

PROJECT REPORT TEMPLATE

Build An Event Management System Using Salesforce view

1) Introduction

1.1. Overview

Salesforce is a powerful platform for building event management systems, allowing you to manage all aspects of your event from registration and ticketing to scheduling and marketing. Here's an overview of how you can build an event management system using Salesforce:

Create an "Event" Object: Start by creating a custom object in Salesforce called "Event". This will serve as the central hub for all of your event data.

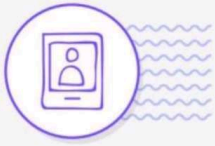
1.2 Purpose

The purpose of building an event management system using Salesforce is to have a centralized platform to manage and track all aspects of events, including planning, registration, attendee management, and post-event analysis. With Salesforce's robust suite of tools, it is possible to create a comprehensive solution that streamlines the entire event lifecycle.



2 Problem Definition & Design Thinking

2.1 Empathy Map



Empathy map

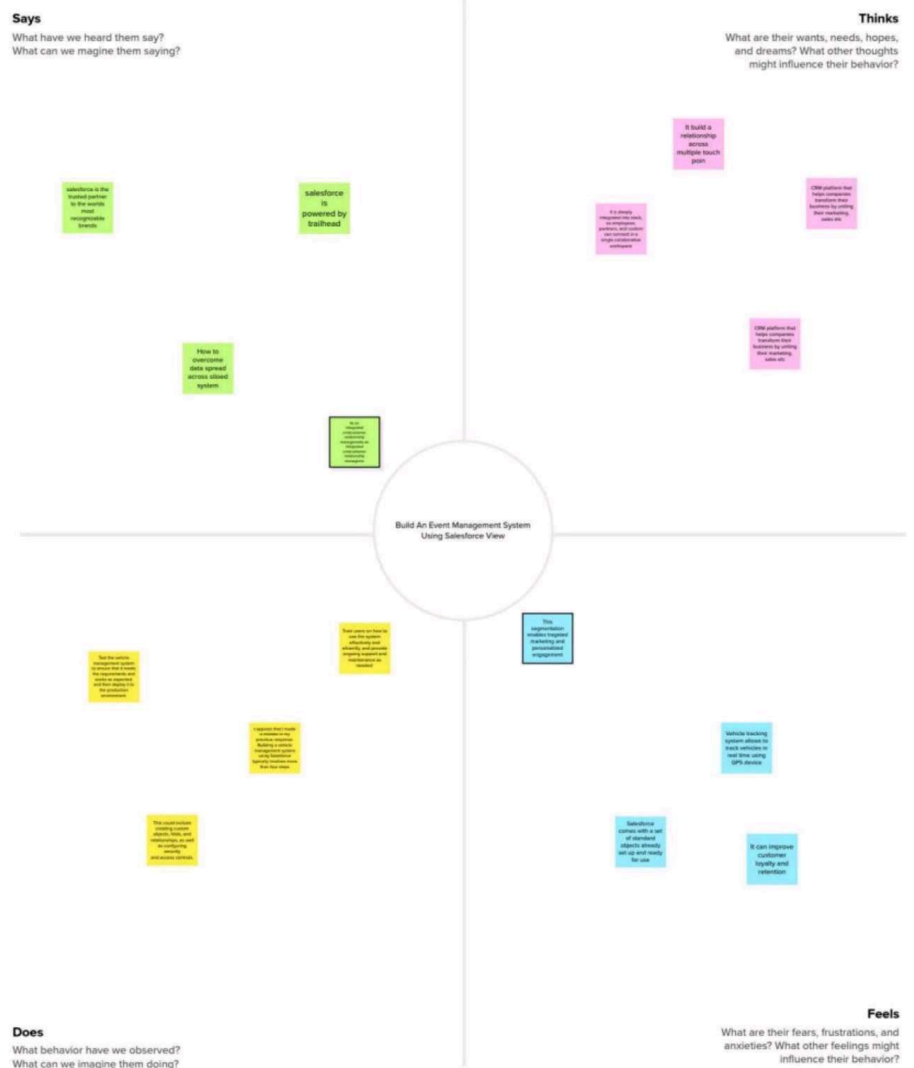
Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)



Build empathy

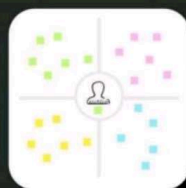
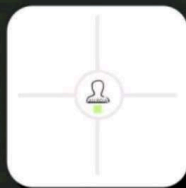
The information you add here should be representative of the observations and research you've done about your users.



Need some inspiration?

See a finished version of this template to kickstart your work.

[Open example](#) →



2.2 IDEATION & BRAINSTORMING MAP

2

Brainstorm solo

Have each participant begin in the "solo brainstorm space" by silently brainstorming ideas and placing them into the template. This "silent-storming" avoids group-think and creates an inclusive environment for introverts and extroverts alike. Set a time limit. Encourage people to go for quantity.

10 minutes



3

Brainstorm as a group

Have everyone move their ideas into the "group sharing space" within the template and have the team silently read through them. As a team, sort and group them by thematic topics or similarities. Discuss and answer any questions that arise. Encourage "yes, and..." and build on the ideas of other people along the way.

15 minutes

TIP
You can use the Voting
template that comes to focus
on the strongest ideas.

4

Decide your focus

Give each person two icons to vote which idea should your team focus on.

5 minutes



3.1 ACTIVITY & SCREENSHOT

Milestone 2 – Object:

Details

EditDelete

Description

API Name

S_c

Custom

✓

Singular Label

Speaker

Plural Label

Speakers

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Details

EditDelete

Description

API Name

V__c

Custom

✓

Singular Label

Vendor

Plural Label

Vendors

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Milestone 3 – Tab:

Home | Salesforce

Event | Salesforce

Tab | Salesforce

gacsalem72-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Search Setup

Setup Home Object Manager

Q tabs

User interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What is This?

Action	Label	Tab Style	Description
Edit Del	Attendees	TV Widescreen	
Edit Del	Events	Camera	
Edit Del	Speakers	Computer	
Edit Del	Vendors	Shopping Cart	

Web Tabs

New What is This?

No Web Tabs have been defined

Details

EditDelete

Description

API Name

S_c

Custom

✓

Singular Label

Speaker

Plural Label

Speakers

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Details

EditDelete

Description

API Name

S__c

Custom

✓

Singular Label

Speaker

Plural Label

Speakers

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Milestone 4 – Fields:

Fields & Relationships				
4 Items, Sorted by Field Label				
		<input type="text" value="Quick Find"/>	<input type="button" value="New"/>	<input type="button" value="Deleted Fields"/>
			<input type="button" value="Field Dependencies"/>	<input type="button" value="Set History Tracking"/>
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Speaker Name	Name	Text(80)		✓

Edit Delete

Speakers

Standard salesforce.com Help Window

Milestone 5 – Profile:

Q pro

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Lead Processes

Sales

Products

Asset Settings

Product Schedules Settings

Search the web and Windows

SETUP

Profiles

Profile Detail

Edit Clone Delete View Users

Name	Event
User License	Salesforce
Description	
Created By	ANB.Palanisamy, 16/04/2023, 5:42 pm
Modified By	ANB.Palanisamy, 16/04/2023, 5:42 pm

Custom Profile ☒

Page Layouts

Standard Object Layouts	
Global	Global Layout [View Assignment]
Email Application	Not Assigned [View Assignment]
Home Page Layout	DE Default [View Assignment]
Account	Account Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]
Asset	Asset Layout [View Assignment]
Asset Action	Asset Action Layout [View Assignment]
Asset Action Source	Asset Action Source Layout
Object Milestone	Object Milestone Layout [View Assignment]
Operating Hours	Operating Hours Layout [View Assignment]
Opportunity	Opportunity Layout [View Assignment]
Opportunity Product	Opportunity Product Layout [View Assignment]
Order	Order Layout [View Assignment]
Order Product	Order Product Layout [View Assignment]
Payment	Payment Layout [View Assignment]
Payment Authorization	Payment Authorization Layout [View Assignment]
Payment Authorization Adjustment	Payment Authorization Adjustment Layout

ENG 5:42 PM 4/16/2023

- Profiles
- ☒ Data
- ☒ Feature Settings
- ☒ Data.com
- ☒ Prospect Preferences
- ☒ Prospect Users
- ☒ Functions
- ☒ Marketing
- ☒ Lead Processes
- ☒ Sales
- ☒ Products
- ☒ Asset Settings
- ☒ Product Relationship

Profile

Event

Help for this Page

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#)

[Enabled Apex Class Access](#)

[Enabled Visualforce Page Access](#)

[Enabled External Data Source Access](#)

[Enabled Named Credential Access](#)

[Enabled Custom Metadata Type Access](#)

[Enabled Custom Settings Definitions Access](#)

[Enabled Flow Access](#)

[Enabled Service Presence Status Access](#)

[Enabled Custom Permissions](#)

Profile Detail

[Edit](#)

[Clone](#)

[Delete](#)

[View Users](#)

Name	Event		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	Aish Palanisamy , 16/04/2023, 5:42 pm		Modified By Aish Palanisamy , 16/04/2023, 5:44 pm

Page Layouts

Standard Object Layouts			
Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity	Opportunity Layout [View Assignment]

Milestone 6 – User:

SETUP

Users

All Users

Help for this Page

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users

Edit

Create New User

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

New User

Reset Password(s)

Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chally00d2w00000rqhceaz.zry3wfyg4xwt@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	P.Akh	pa	pa@9361.com		✓	Custom Sales Profile
<input type="checkbox"/> Edit	P.Akh	pa	pa@93617.com		✓	Cross Org Data Proxy User
<input type="checkbox"/> Edit	Palanisamy, Apm	APala	ap@ap@dhala2003@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	User_Integration	inteq	integration@00d2w00000rqhceaz.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@00d2w00000rqhceaz.com		✓	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Details

EditDelete

Description

API Name

E_c

Custom

✓

Singular Label

Event

Plural Label

Events

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard [salesforce.com Help Window](#)

Details

EditDelete

Description

API Name

A_c

Custom

✓

Singular Label

Attendee

Plural Label

Attendees

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Milestone 7 – Permission sets:

SETUP

Permission Sets

Permission Sets

Help for this Page ?

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets ▾ [Edit](#) | [Delete](#) | [Create New View](#)

New ↕

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

<input type="checkbox"/>	Action	Permission Set Label ↑	Description	License
<input type="checkbox"/>	Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
<input type="checkbox"/>	Clone	Commerce Admin	Allow access to commerce admin features	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
<input type="checkbox"/>	Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
<input type="checkbox"/>	Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
<input type="checkbox"/>	Del Clone	Event Permis		
<input type="checkbox"/>	Del Clone	Experience Profile Manager		Salesforce

Milestone 8 - Reports

The screenshot shows the Salesforce Setup interface for Custom Report Types. The browser tabs include 'Home | Salesforce', 'Event | Salesforce', and 'Report Types | Salesforce'. The address bar shows the URL: 'gacsalem72-dev-ed.develop.lightning.force.com/lightning/setup/CustomReportTypes/home'. The left sidebar contains a search bar with 'repo' and a list of navigation items: Feature Settings, Analytics, Reports & Dashboards (selected), Access Policies, Historical Trending, Report Types (highlighted), Reporting Snapshots, and Reports and Dashboards Settings. The main content area is titled 'Report Types' and 'All Custom Report Types'. It includes a description: 'With custom report types, you can enable users to create reports from the predefined objects, object relationships, and fields that you specify.' Below this is a table with one entry: 'Screen Flows' with a description 'Find out which flows get executed and how long users take to complete each flow screen.' The table has columns for Action, Label, Description, Category, Deployed, Created By Alias, and Created Date. A 'New Custom Report Type' button is visible above the table.

There are 3 types of access levels of folders:

1. Viewer:

1. Viewer:

With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

2. Editor:

With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

3. Manager:

With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

Setup Roles

Users

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

Setup Roles

- SVP_Human Resources Edit | Del | Assign
 - Add Role
- SVP_Sales & Marketing Edit | Del | Assign
 - Add Role
 - VP_International Sales Edit | Del | Assign
 - Add Role
 - VP_Marketing Edit | Del | Assign
 - Add Role
 - Marketing Team Edit | Del | Assign
 - Add Role
 - VP_North American Sales Edit | Del | Assign
 - Add Role
 - Director_Channel Sales Edit | Del | Assign
 - Add Role
 - Channel Sales Team Edit | Del | Assign
 - Add Role
 - Director_Direct Sales Edit | Del | Assign
 - Add Role
 - Eastern Sales Team Edit | Del | Assign
 - Add Role
 - Western Sales Team Edit | Del | Assign
 - Add Role
- Vehicle Management Edit | Del | Assign
 - Add Role

Login | Salesforce Reports | Salesforce

governmentartscollegesalem-2-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mr

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Reports

Recent

2 items

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Contacts & Accounts Report		Private Reports	GOKUL KANNAN	13/4/2023, 10:12 am	
Created by Me	New Vehicles Report		Private Reports	GOKUL KANNAN	11/4/2023, 12:53 pm	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

To Do List

Log in | Salesforce

Dashboards | Salesforce

governmentartscollegesalem-2-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Dashboards

Recent

3 items

Search recent dashboards...

New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Vehicle and customer details		Private Dashboards	GOKUL KANNAN	13/4/2023, 10:15 am	
Created by Me						
Private Dashboards						
All Dashboards						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

To Do List

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

4)TRAILHEAD PROFILE PUBLIC URL

Team Leader -<https://trailblazer.me/id/ajith702>

Team member 1- <https://trailblazer.me/id/abimr1>

Team member 2- <https://trailblazer.me/id/prabhu727>

Team member 3- <https://trailblazer.me/id/shanv29>

Team member 4-

5.ADVANTAGES

1) Centralized data management: Salesforce is a powerful customer relationship management (CRM) platform that enables you to store all your event-related data in one centralized location.

2) Streamlined event planning: Salesforce allows you to automate many aspects of event planning, such as scheduling, email communications, and registration tracking.

DISADVANTAGE

1)Salesforce is a powerful CRM platform that can be used for event management, but there are also some disadvantages to consider. Here are some steps to build an event management system using Salesforce and the associated drawbacks:

6.APPLICATIONS

*** Building an event management system using Salesforce can be a powerful solution that streamlines your event planning and management process. Here are some steps to consider:**

***Define your event management process:** Start by defining your event management process and what you want to achieve with the system. This will help you determine which Salesforce features to use and how to customize them.



7.CONCLUSION

Salesforce also offers various customization options and integrations with other tools to provide a personalized event experience. Event organizers can create custom registration forms, design event websites, and integrate with payment processors to make ticket purchases seamless.

8.FUTURE SCOPE

Virtual and Hybrid Event Management: With the rise of virtual and hybrid events, event management systems built on Salesforce will need to adapt to support these new formats

Increased Customization and Personalization: As businesses continue to prioritize personalized experiences for their customers, event management systems built on Salesforce will need to offer even more customization and personalization options. This could include personalized event agendas, targeted marketing campaigns, and more..

