

Project Report Template

- **INTRODUCTION**

Overview:

An Event Management System provides campus event planners a flexible, fully integrated solution to simplify the event management process and keep your customers, faculty and students happy, while maintaining important reports and data for making real estate and future planning decisions.


Purpose

Streamlining event management processes: Salesforce's event management system can help automate tasks such as registration, ticketing, scheduling, and marketing, reducing the amount of manual work required and increasing efficiency.

Enhancing attendee experience: With Salesforce, event organizers can personalize the attendee experience by creating targeted marketing campaigns and communications, managing attendee profiles, and providing real-time updates.

Tracking event performance: Salesforce's reporting and analytics capabilities can help event organizers track key metrics such as attendance, revenue, and engagement, allowing them to make data-driven decisions for future events.

- **Problem Definition & Design Thinking**



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, need 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.

Says
What have we heard them say?
What can we imagine them saying?

Date: 2.4.2023
Team: IDAM2023TMD12225
Project Name: Build an Event Management System using Salesforce

Maintaining an Event

Process spans from beginning of plan

Way to post-event strategizing

Sourcing, designing, regulation checks,

A product launch

Internal sales kick-off, or event a wedding

Any event the requires considerable planning and execution is event

Thinks
What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

Provide real-time knowledge

Object & Relationship in Salesforce

Run smoothly

Event manager makes Planning decision

Customer success platform

designed to help you sell, service, market, analyze.


Mange relationships with prospects and customers

Store your data securely in the cloud.


Build an Event Management System using Salesforce

Does
What behavior have we observed?
What can we imagine them doing?

Feels
What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?



Need some inspiration?
Use a related one of this template to kickstart your idea.
[Open example](#)



Ideation & Brainstorming Map

Brainstorm & idea prioritization

Use this template to generate and brainstorm ideas for your project. It helps you to generate ideas, prioritize them, and then implement them. It also helps you to generate ideas, prioritize them, and then implement them.

[Share template feedback](#)

Brainstorm

Use this template to generate and brainstorm ideas for your project. It helps you to generate ideas, prioritize them, and then implement them. It also helps you to generate ideas, prioritize them, and then implement them.

[Share template feedback](#)

Brainstorm

Use this template to generate and brainstorm ideas for your project. It helps you to generate ideas, prioritize them, and then implement them. It also helps you to generate ideas, prioritize them, and then implement them.

[Share template feedback](#)

Brainstorm

Use this template to generate and brainstorm ideas for your project. It helps you to generate ideas, prioritize them, and then implement them. It also helps you to generate ideas, prioritize them, and then implement them.

[Share template feedback](#)

Brainstorm

Use this template to generate and brainstorm ideas for your project. It helps you to generate ideas, prioritize them, and then implement them. It also helps you to generate ideas, prioritize them, and then implement them.

[Share template feedback](#)

Brainstorm

Use this template to generate and brainstorm ideas for your project. It helps you to generate ideas, prioritize them, and then implement them. It also helps you to generate ideas, prioritize them, and then implement them.

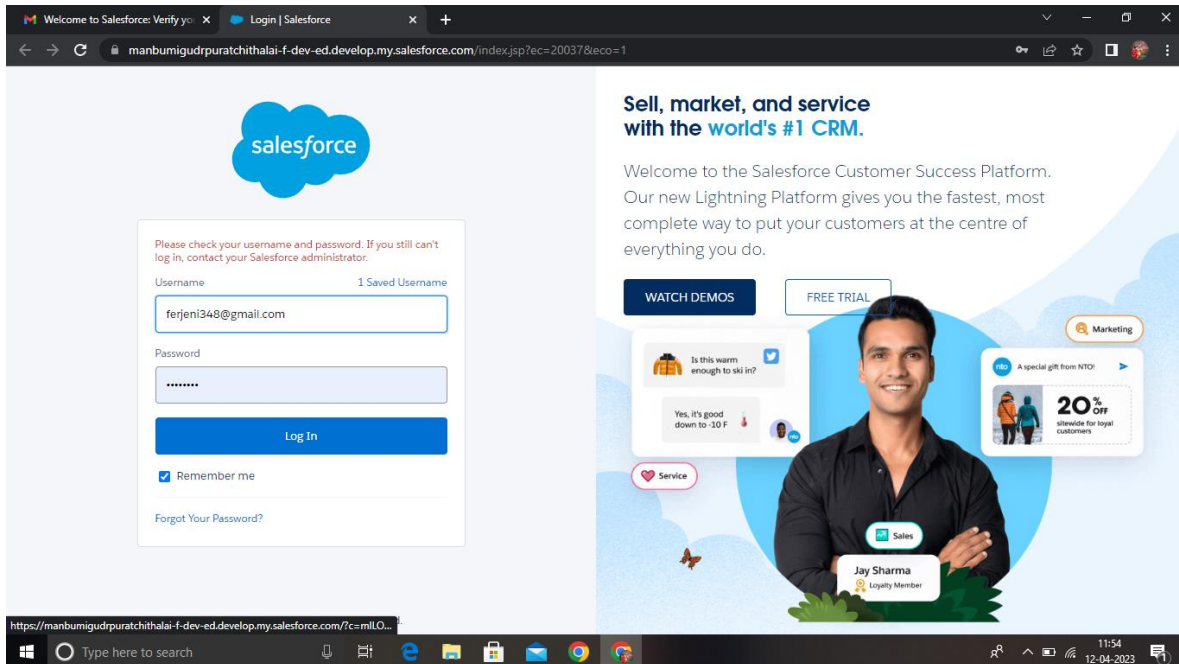
[Share template feedback](#)

Data Model:

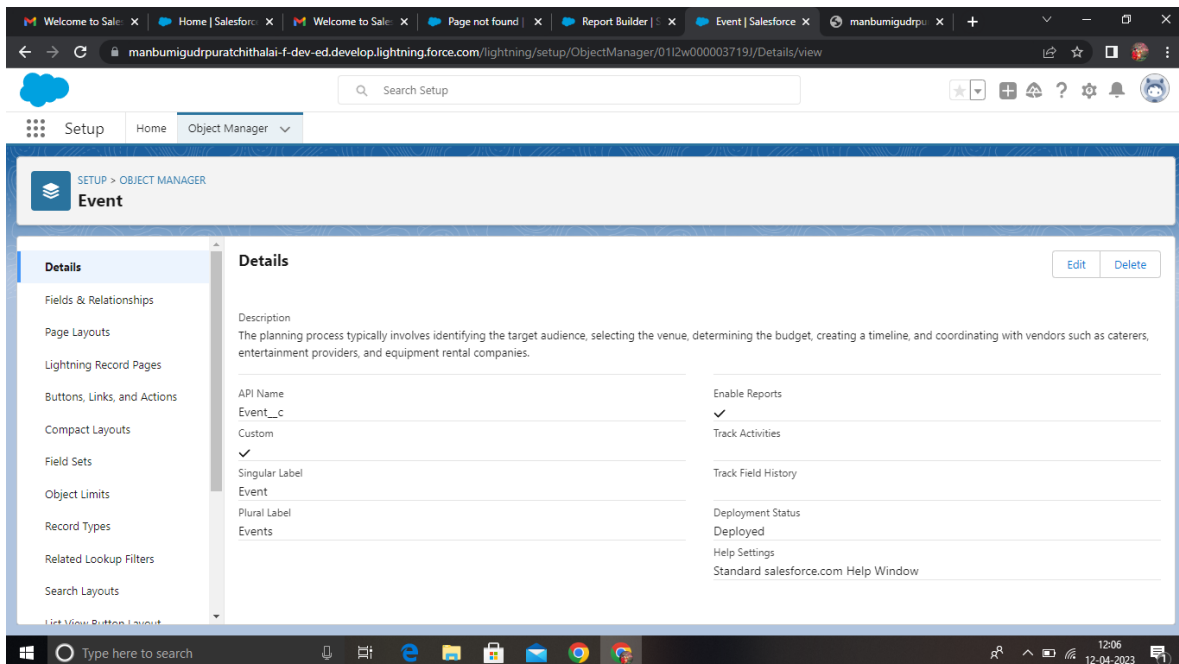
Object name	Fields in the object	
EVENT	Field label	Data type
	City	Text
	Start date	Date / Time
	End date	Date / Time
	Event	Master-detail relationship
ATTENDEES	ID	Auto number
	Phone	Phone
	E-mail	E-mail
	Ticket	Picklist
SPEAKER	Bio	Text area
	E-mail	E-mail
	Event	Look-up relationship
	Event name	Look-up relationship
VENDOR	E-mail	E-mail
	Phone	Phone
	Text	Service provide
	Event	Look-up relationship
	Event name	Look-up relationship

Activity & Screenshot:

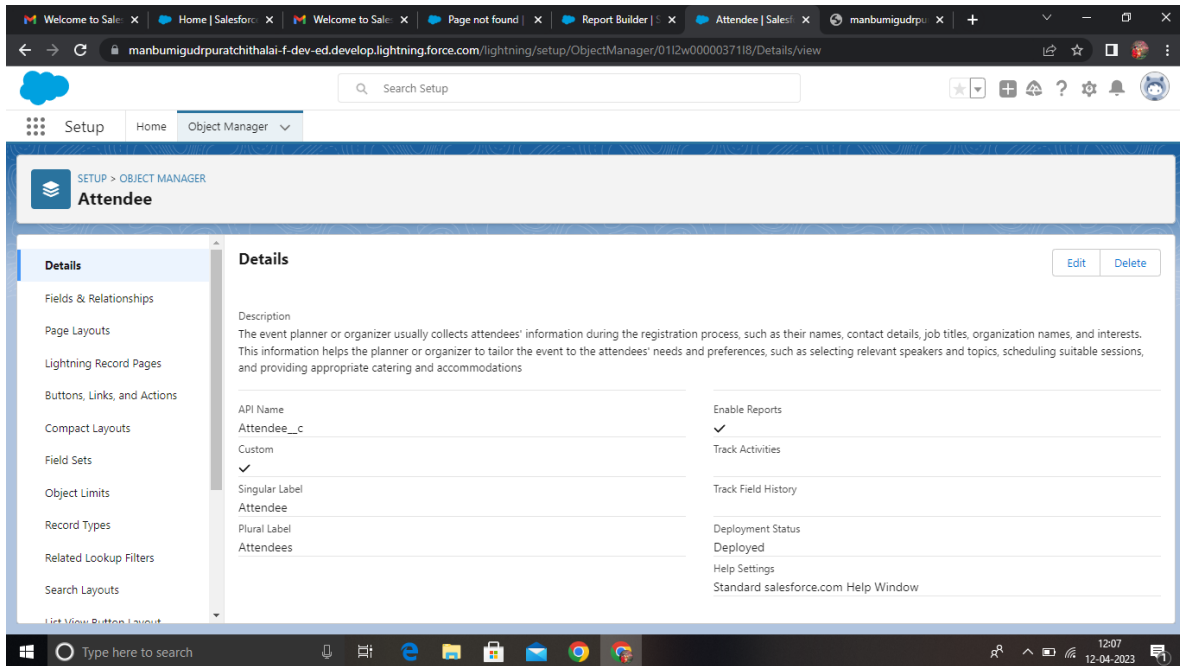
Creating A salesforce Developer Org



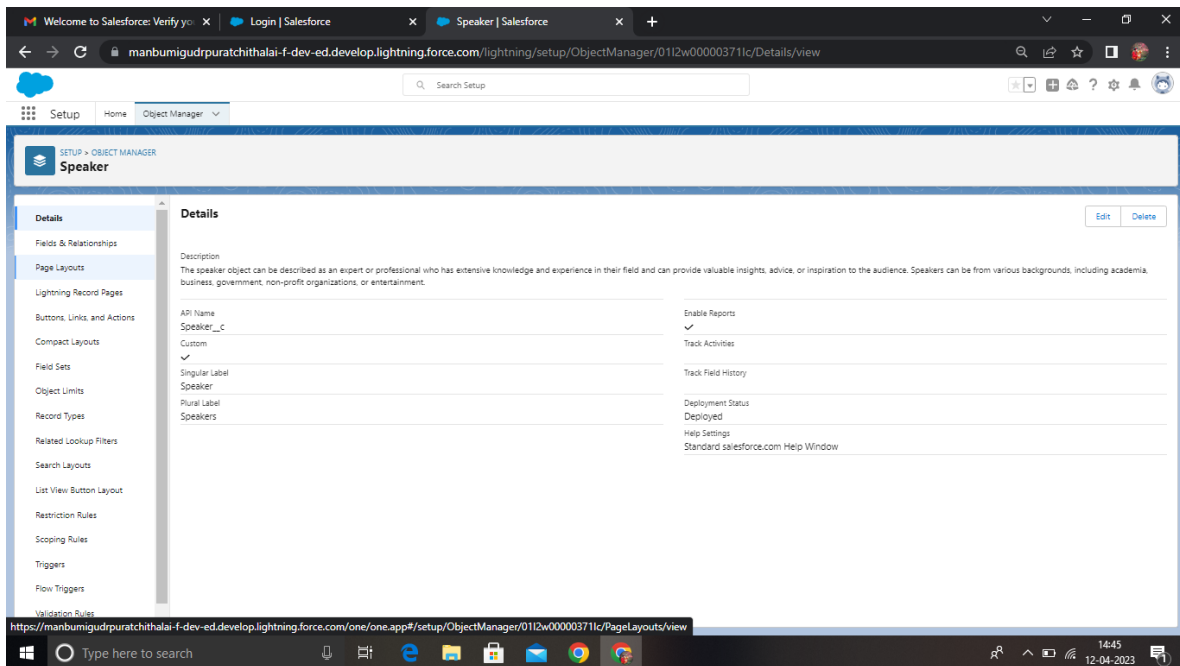
Creation of Object for event management



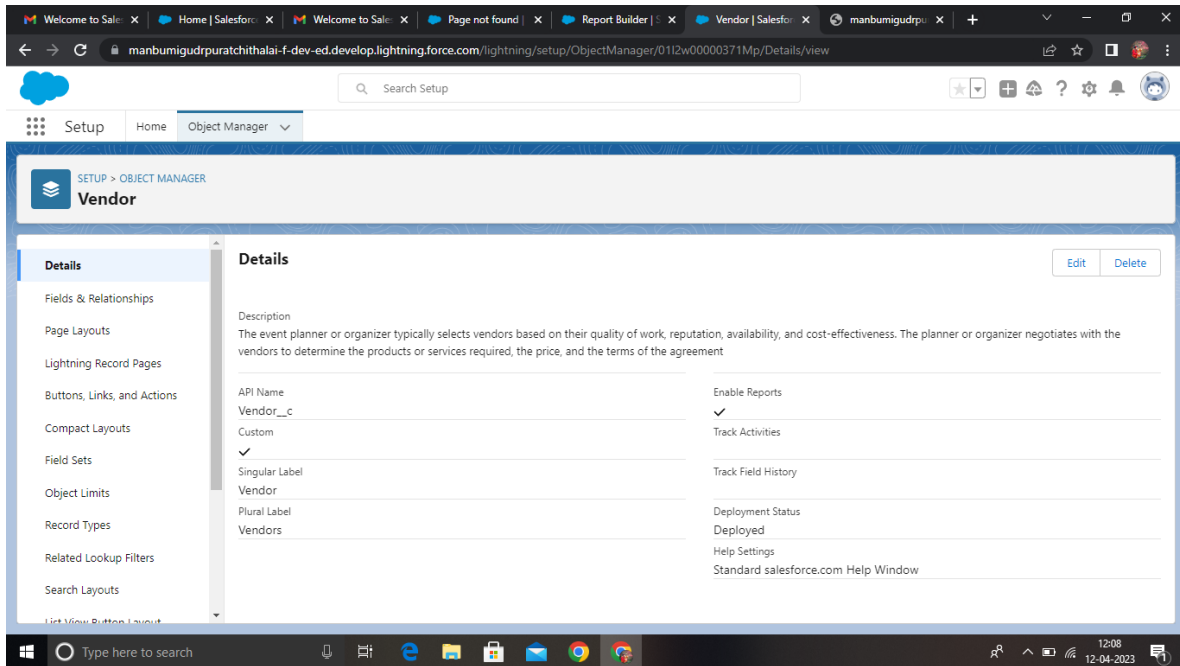
Creation of Attendees Object



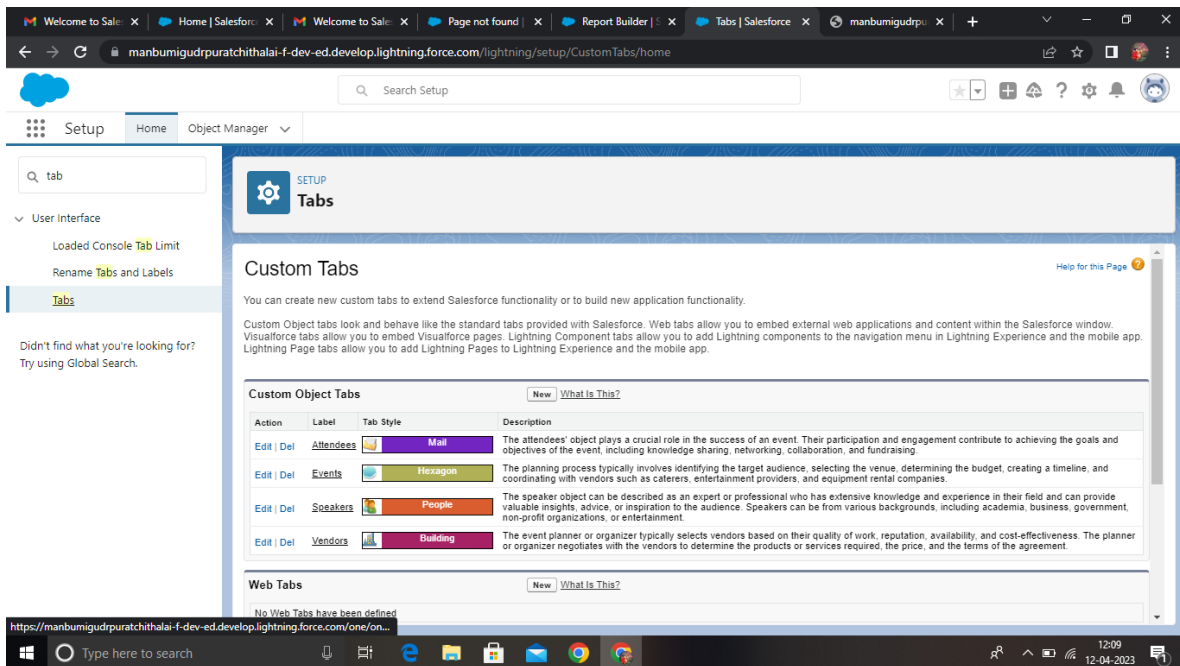
Creation of speaker Object



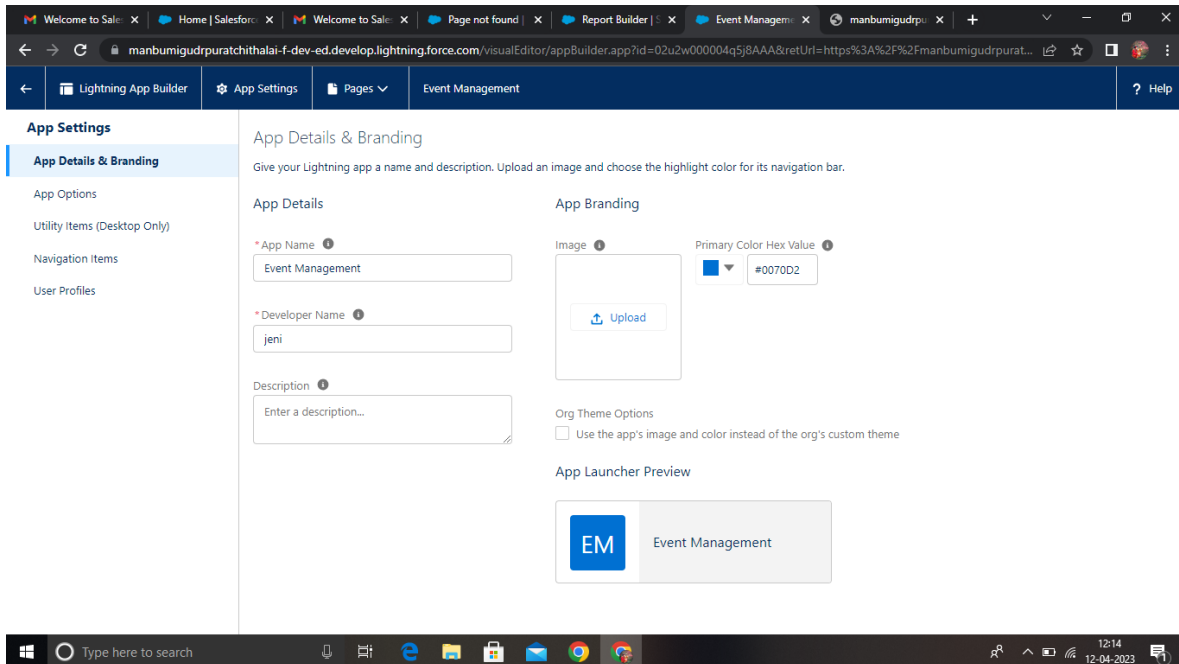
Creation of Vendors Object



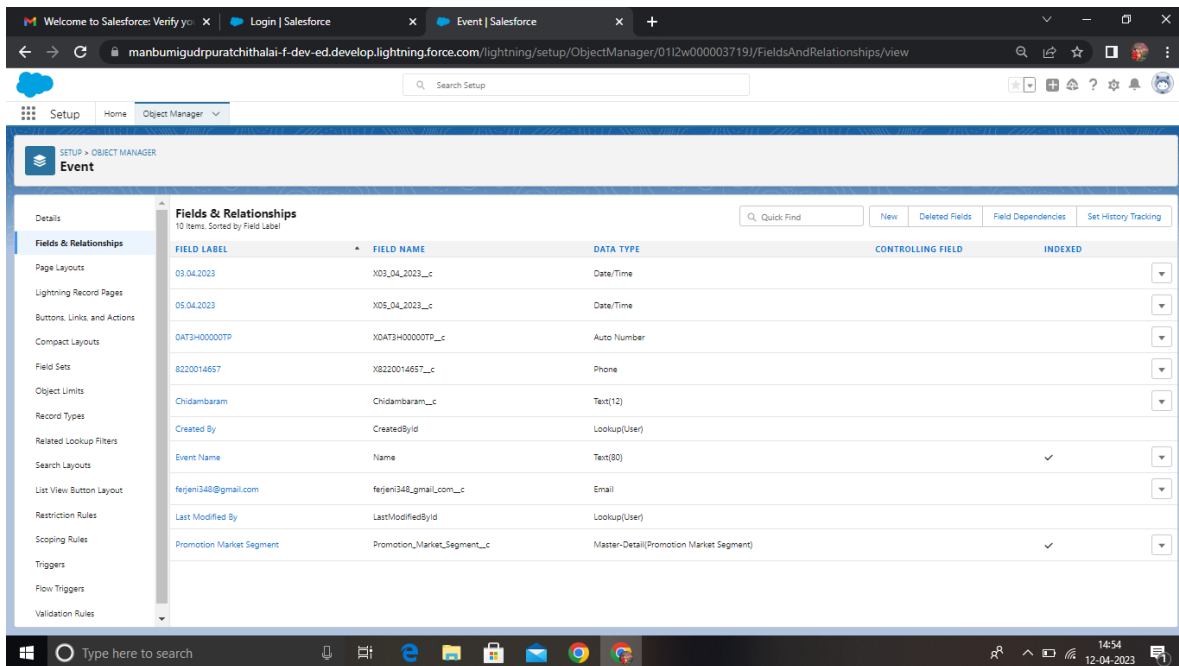
Creation of tabs



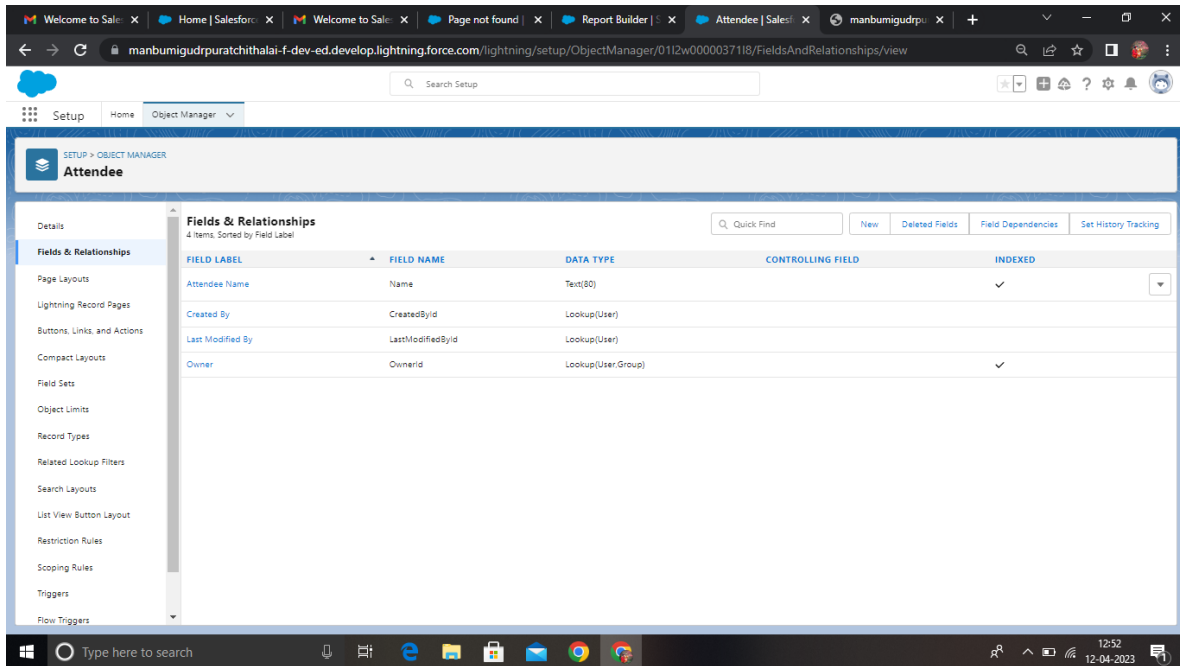
Create the Event Management Construction App



Creation of Fields for the Event Objects



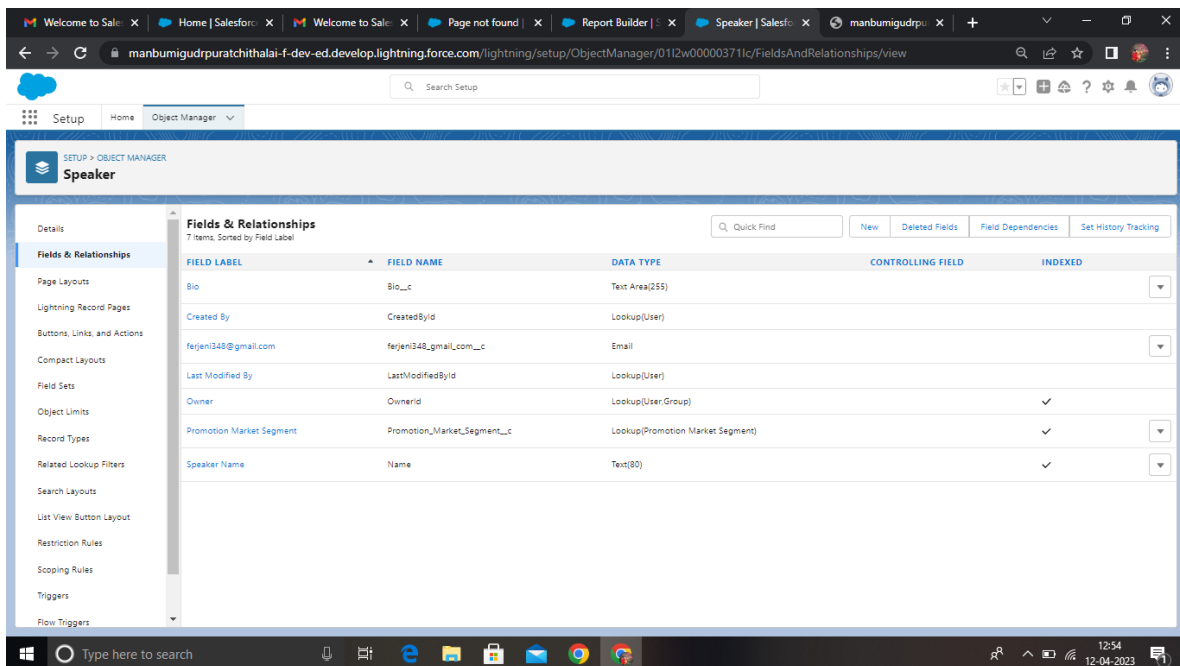
Creation of fields for the Attendees Objects



The screenshot shows the Salesforce Object Manager interface for the 'Attendee' object. The 'Fields & Relationships' tab is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. There are 4 items listed, sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User:Group)		✓

Creation of Fields for the speakers object

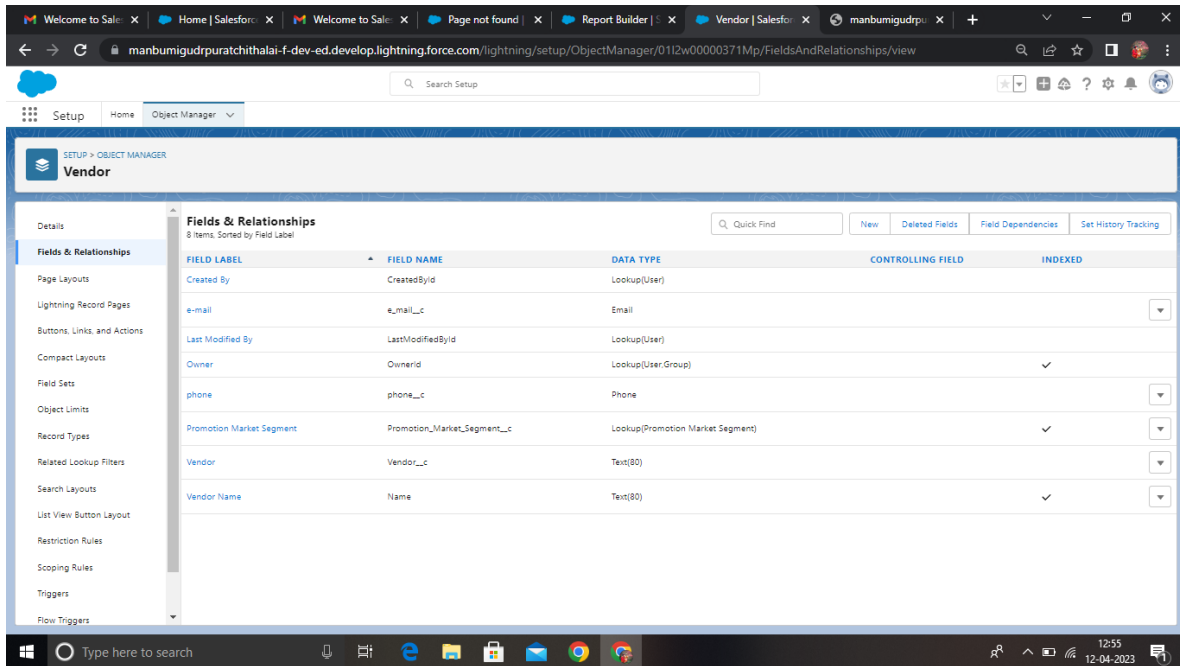


The screenshot shows the Salesforce Object Manager interface for the 'Speaker' object. The 'Fields & Relationships' tab is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. There are 7 items listed, sorted by Field Label.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bio	Bio__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
ferjen348@gmail.com	ferjen348_email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User:Group)		✓
Promotion Market Segment	Promotion_Market_Segment__c	Lookup(Promotion Market Segment)		✓
Speaker Name	Name	Text(80)		✓

Creation of fields for the vendors objects

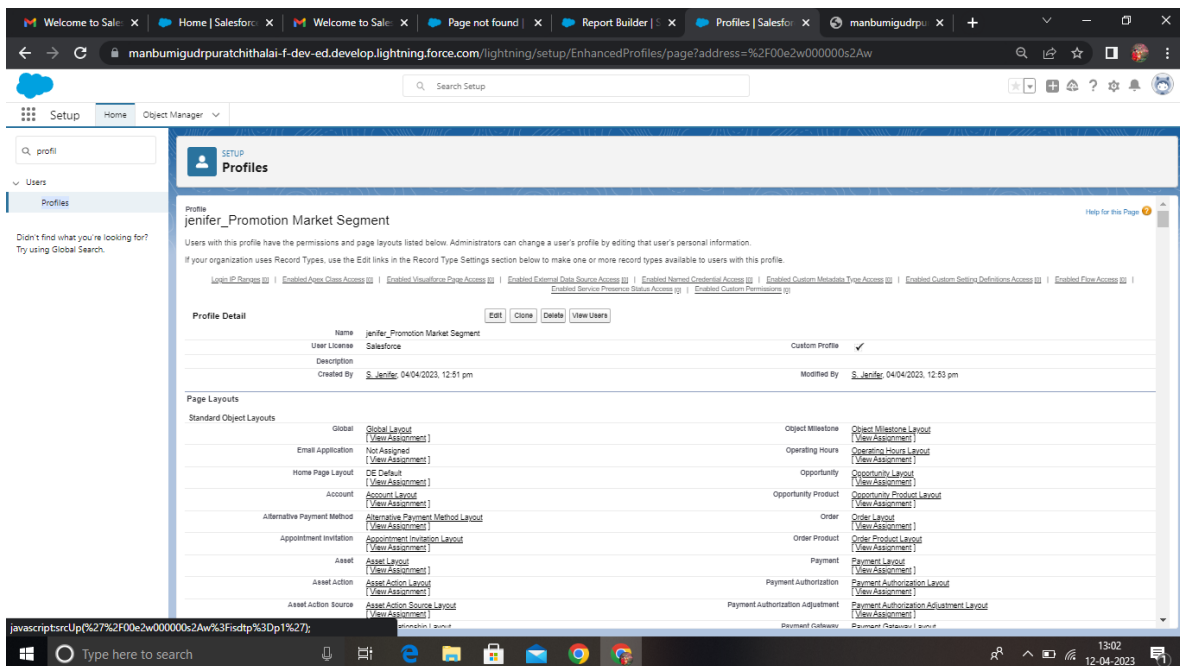
Project Report Template



The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The 'Fields & Relationships' section is active, displaying a list of fields and their relationships. The table below summarizes the fields shown:

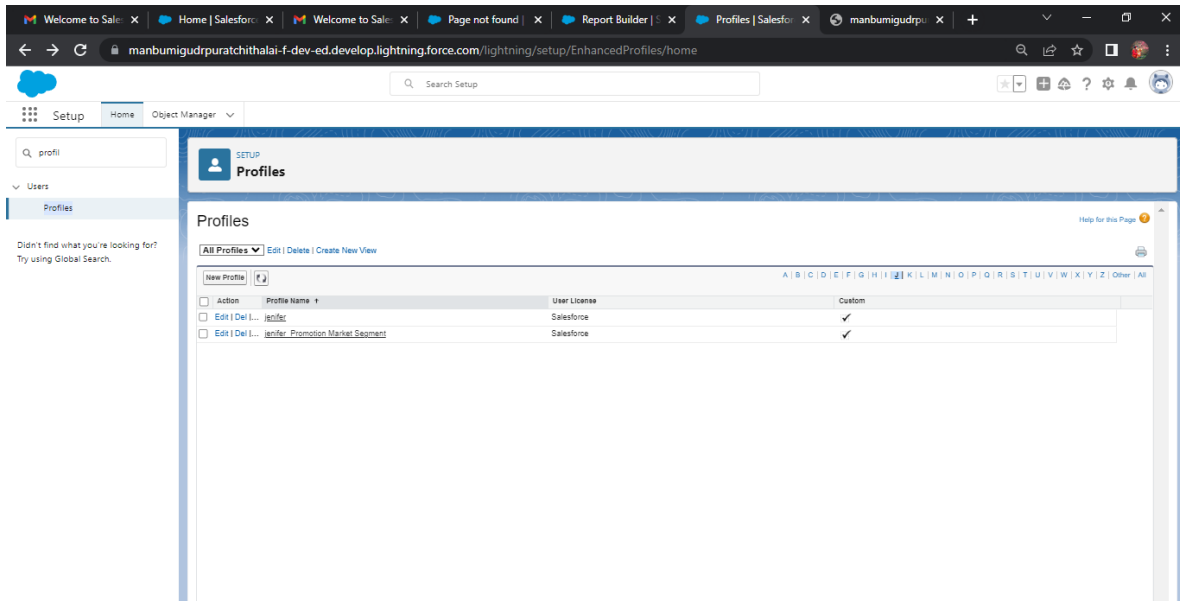
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
e-mail	e_mail_c	Email		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
phone	phone_c	Phone		
Promotion Market Segment	Promotion_Market_Segment_c	Lookup(Promotion Market Segment)		✓
Vendor	Vendor_c	Text(80)		
Vendor Name	Name	Text(80)		✓

Creation on profile

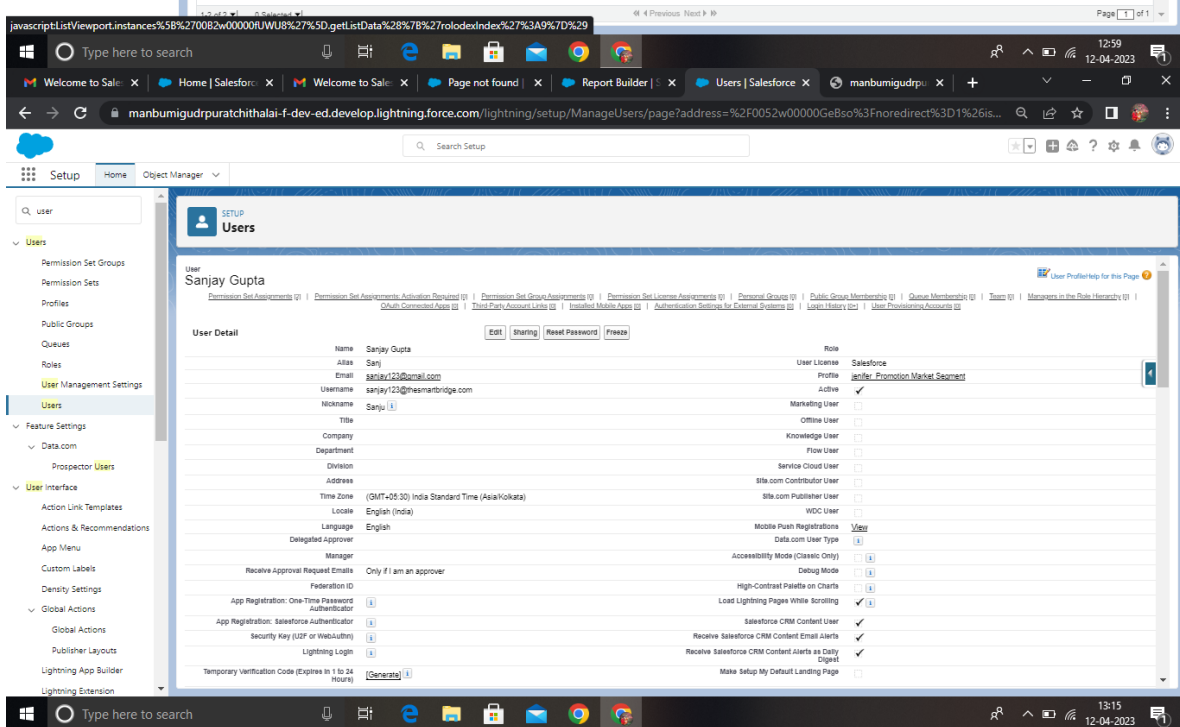


The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The 'Profile Detail' for 'jenifer_Promotion Market Segment' is displayed. The profile is a Custom Profile, created by S. Jenifer on 04/04/2023 at 12:51 pm. The profile is associated with the 'Salesforce' user license. The 'Page Layouts' section shows the following assignments:

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

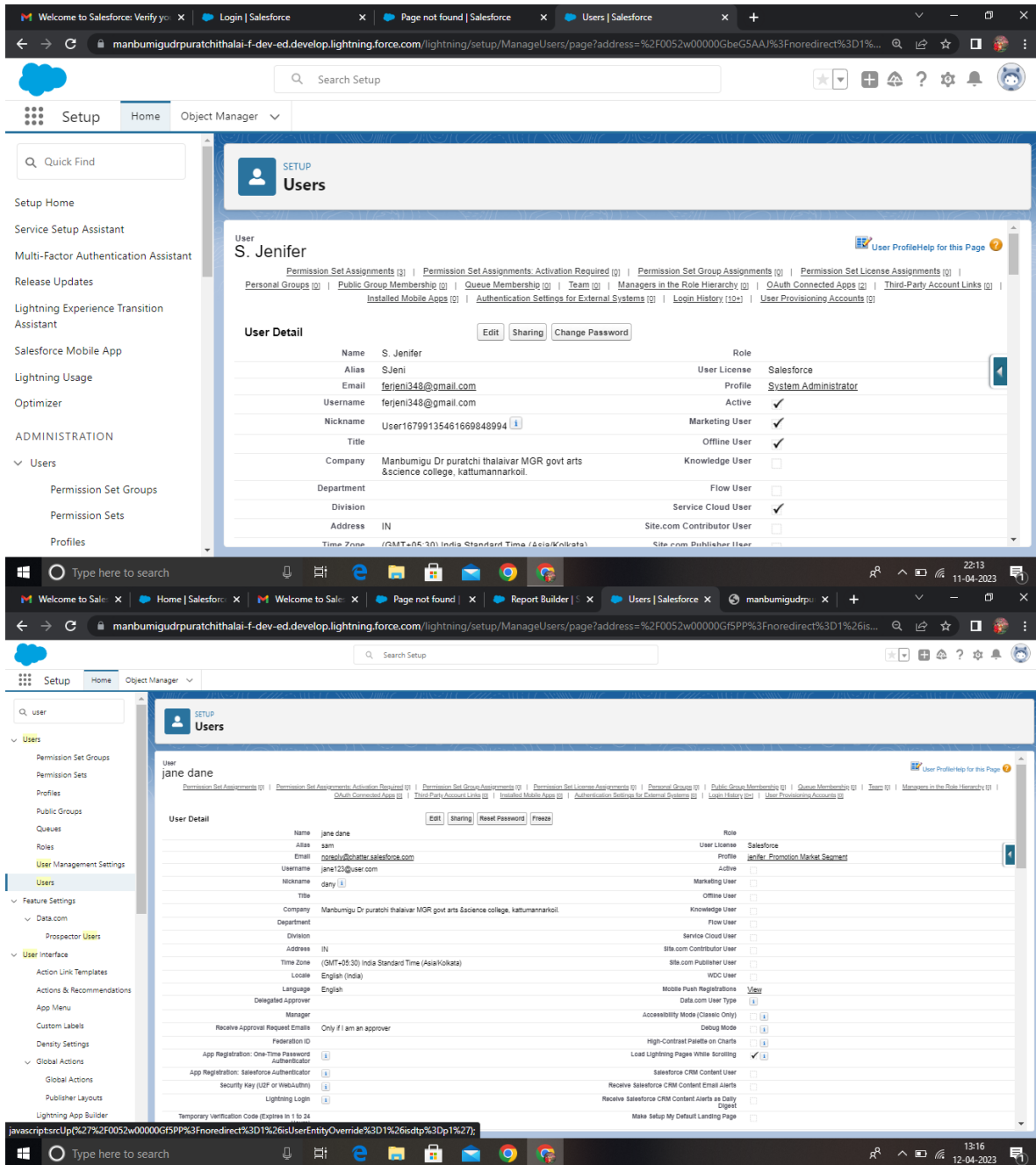


The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profil' and a list of navigation items: Users, Profiles, and a search result for 'profil'. The main content area is titled 'Profiles' and includes a table with columns: Action, Profile Name, User License, and Custom. The table lists two profiles: 'jgiller' and 'jgiller_Promotion Market Segment', both with 'Salesforce' user licenses. The 'Custom' column has checkboxes, with the second profile having a checked box.



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar with 'user' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospector Users, User Interface, Action Link Templates, Actions & Recommendations, App Menu, Custom Labels, Density Settings, Global Actions, Publisher Layouts, Lightning App Builder, and Lightning Extension. The main content area is titled 'Users' and shows the details for a user named 'Sanjay Gupta'. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password Authentication, App Registration: Salesforce Authentication, Security Key (U2F or WebAuthn), Lightning Login, and Temporary Verification Code. The 'Role' section includes fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Salesforce Contributor User, WFO User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Salesforce CRM Content User, Receive Salesforce CRM Content Email Alerts, Receive Salesforce CRM Content Alerts as Daily Digest, and Make Setup My Default Landing Page.

Users:



The screenshot displays the Salesforce Setup interface for managing users. The left sidebar shows the navigation menu with options like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION. The main content area shows the user profile for S. Jenifer, including details like Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Role, User License, Profile, and various permissions.

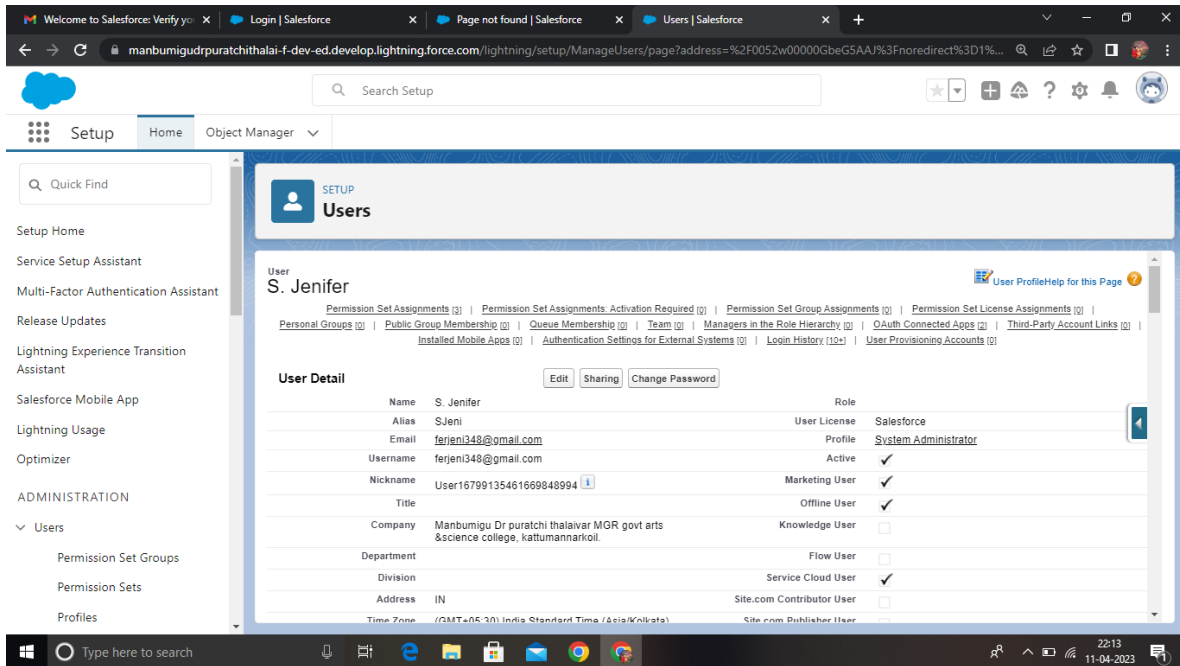
User Detail

Field	Value	Field	Value
Name	S. Jenifer	Role	User License
Alias	SJeni	User License	Salesforce
Email	ferjen348@gmail.com	Profile	System Administrator
Username	ferjen348@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16799135461669048994	Marketing User	<input checked="" type="checkbox"/>
Title		Offline User	<input checked="" type="checkbox"/>
Company	Manbumigu Dr puratchi thalaivar MGR govt arts & science college, kattumannarkoil.	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input checked="" type="checkbox"/>
Address	IN	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>

The second screenshot shows the user profile for jane dane. The left sidebar shows the navigation menu with options like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION. The main content area shows the user profile for jane dane, including details like Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Role, User License, Profile, and various permissions.

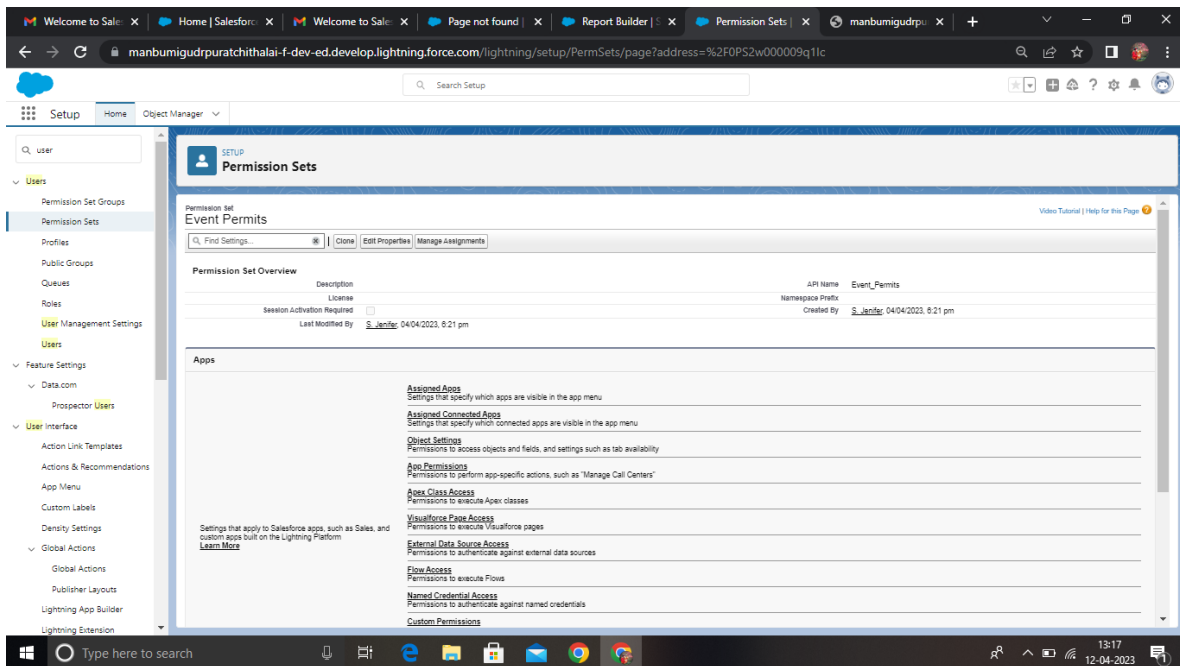
User Detail

Field	Value	Field	Value
Name	jane dane	Role	User License
Alias	sam	User License	Salesforce
Email	noresdy@chatter.salesforce.com	Profile	jenifer_Promotion Market Segment
Username	jane123@user.com	Active	<input type="checkbox"/>
Nickname	dany	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company	Manbumigu Dr puratchi thalaivar MGR govt arts & science college, kattumannarkoil.	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	IN	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WFO User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input checked="" type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authentication	<input type="checkbox"/>	Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authentication	<input type="checkbox"/>	Salesforce CRM Content User	<input type="checkbox"/>
Security Key (UDF or WebAuthn)	<input type="checkbox"/>	Receive Salesforce CRM Content Email Alerts	<input type="checkbox"/>
Lightning Login	<input type="checkbox"/>	Receive Salesforce CRM Content Alerts as Daily Digest	<input type="checkbox"/>
		Make Setup My Default Landing Page	<input type="checkbox"/>

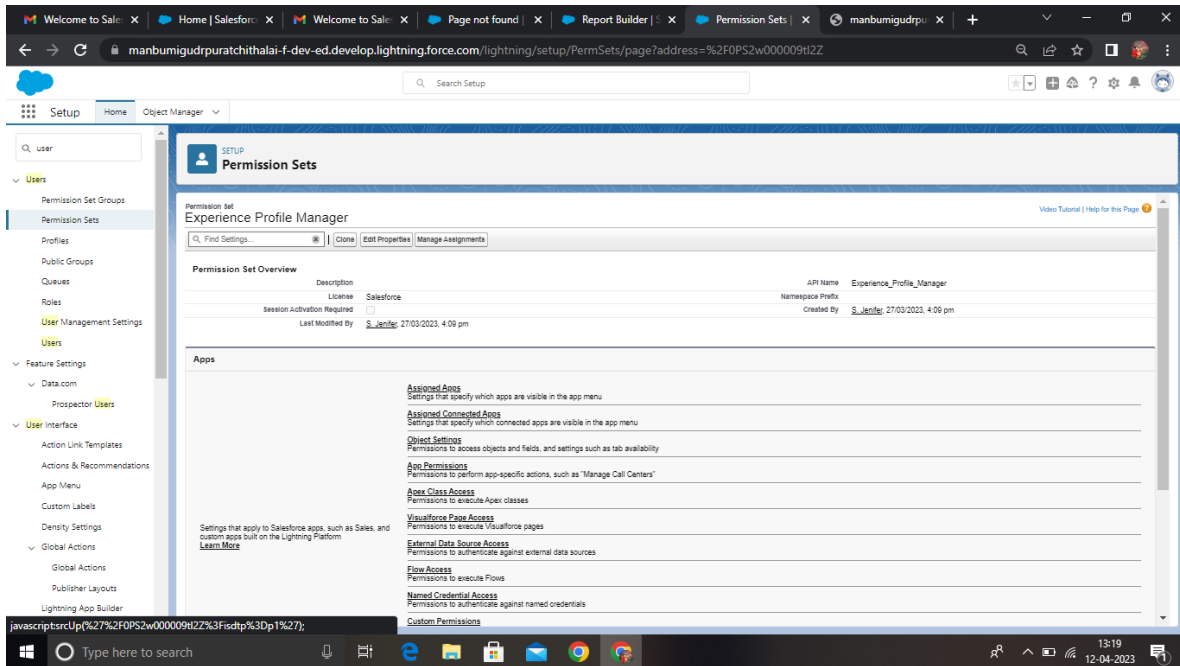


The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links such as 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION'. Under 'ADMINISTRATION', the 'Users' link is selected. The main content area displays the 'User' profile for 'S. Jenifer'. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, and Time Zone. The 'Role' section shows the user's role as 'Salesforce' and 'System Administrator'. The 'Profile' section shows the user's profile as 'Active'. The 'Marketing User' checkbox is checked. The 'Offline User' checkbox is checked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is checked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked.

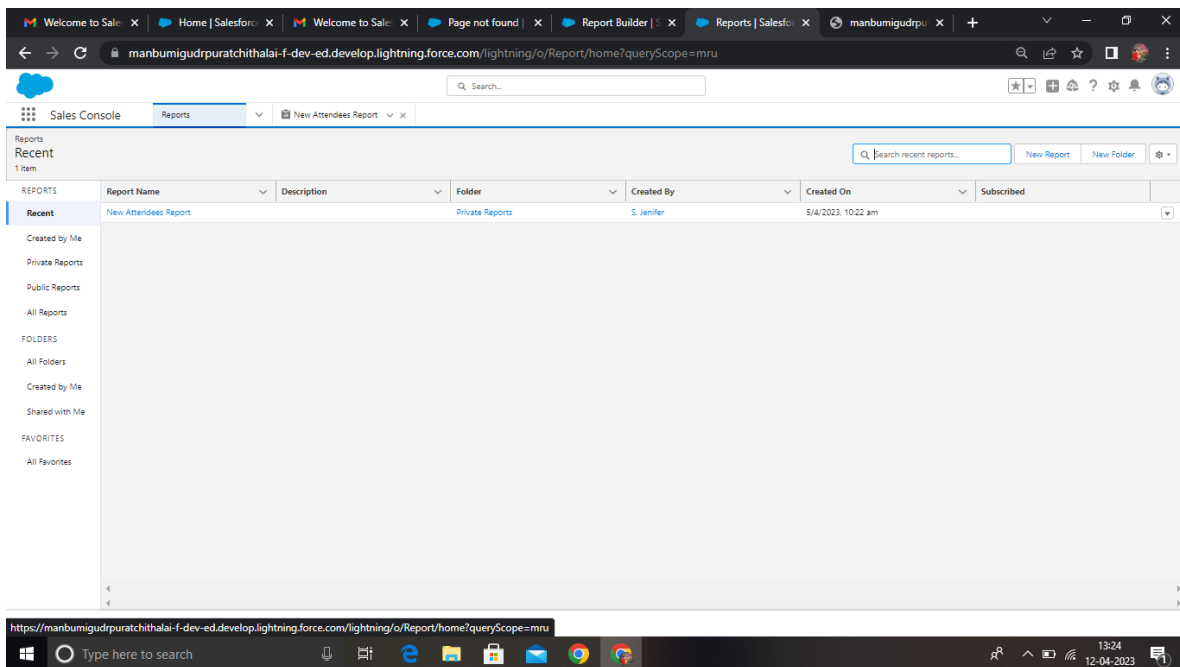
Permission sets:



The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains navigation links such as 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION'. Under 'ADMINISTRATION', the 'Users' link is selected. The main content area displays the 'Permission Set' overview for 'Event Permits'. The 'Permission Set Overview' section includes fields for Description, License, Session Activation Required, Last Modified By, and Created By. The 'Apps' section lists various permission categories and their descriptions, including 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', 'Visualforce Page Access', 'External Data Source Access', 'Flow Access', 'Named Credential Access', and 'Custom Permissions'.



Reports:



Trailhead Profile Public URL

Team Lead - [trailblazer.me /id/sjenifer3](https://trailblazer.me/id/sjenifer3)

Team Member 1 - [trailblazer.me /id/jayab53](https://trailblazer.me/id/jayab53)

Team Member2-[trailblazer.me/id/ kani2](https://trailblazer.me/id/kani2)

Team Member3-trailblazer.me/id/kkathir18

5. ADVANTAGES&DISADVANTAGES:

ADVANTAGES:

Centralized data management: Salesforce allows you to store all your event-related data in one place, making it easier to manage and analyze data from different sources.

Customizable: Salesforce is highly customizable, which means that you can tailor the event management system to your specific needs and requirements.

Integration with other tools: Salesforce integrates with a variety of other tools, such as marketing automation and project management software, allowing you to create a seamless workflow for your event management process.

Collaboration: Salesforce allows you to collaborate with your team and stakeholders, giving everyone access to the same information in real-time.

Mobile accessibility: Salesforce is accessible from any device with an internet connection, which means that you can manage events on-the-go.

Disadvantages:

DISADVANTAGES:

Cost: Salesforce can be expensive, especially if you require additional features or customizations.

Complexity: Salesforce is a complex system that requires a certain level of technical expertise to set up and manage effectively.

Learning curve: Salesforce has a steep learning curve, which means that it may take some time for your team to become proficient in using the system.

Dependence on internet connectivity: Salesforce is cloud-based, which means that it requires a stable internet connection to function properly. If you experience connectivity issues, you may not be able to access your event management system.

Security concerns: As with any cloud-based system, there are security concerns when storing sensitive data online. You will need to take appropriate measures to ensure the security of your event data.

Overall, Salesforce can be an excellent choice for event management, especially for larger organizations with complex event management needs. However, it is important to weigh the advantages and disadvantages carefully before making a decision.

6. APPLICATIONS:

To build an Event Management System using Salesforce applications, you can follow these steps:

- Create a custom object for Events:
- Go to Setup -> Object Manager -> Create -> Custom Object
- Add fields to the custom object such as Event Name, Start Date, End Date, Venue, Registration Deadline, etc.
- Create a custom object for Registrations:
- Go to Setup -> Object Manager -> Create -> Custom Object
- Add fields to the custom object such as Event Name, Contact Name, Registration Date, Payment Status, etc.
- Create a custom object for Attendees:

- Go to Setup -> Object Manager -> Create -> Custom Object
- Add fields to the custom object such as Event Name, Contact Name, Registration Date, Payment Status, etc.
- Set up Event Registration:
- Create a web-to-lead form to capture attendee information.
- Use the Salesforce Marketing Cloud to send email invitations to potential attendees.
- Set up an approval process for event registrations.
- Create a dashboard to track event attendance:
- Use Salesforce Reports and Dashboards to create a dashboard to track event attendance and registration.
- Use the Attendees custom object to track which attendees have registered and attended the event.

7. CONCLUSION:

In conclusion, building an event management system using Salesforce is a smart choice for businesses that want to streamline their event planning process. Salesforce offers a wide range of tools and features that can be customized to meet the unique needs of any organization, including event management.

With Salesforce, event planners can easily manage the entire event lifecycle, from planning and registration to post-event follow-up. The system provides a centralized location for managing attendee data, creating event schedules, sending invitations and

reminders, collecting payments, and more.

Salesforce also offers powerful reporting and analytics capabilities, enabling event planners to track attendance, engagement, and ROI for their events. Plus, the platform can be integrated with other systems, such as marketing automation tools and customer relationship management (CRM) software, to create a seamless experience for attendees and stakeholders.

Overall, building an event management system using Salesforce can help businesses save time, reduce costs, and improve the overall success of their events. With its robust features and customization options, Salesforce is a top choice for organizations looking to streamline their event planning process.

8. FUTURE SCOPE:

Salesforce is a powerful platform that can be used to build a robust event management system. Here are the steps to create an event management system using Salesforce:

Define Object and Fields: Start by defining the objects and fields that will be used to store information about events. For example, you may need objects for events, attendees, speakers, sponsors, and venues. For each object, define the fields that will be used to store information, such as event name, date, location, attendee name, email, etc.

Customize Page Layouts: Customize the page layouts for each object to make it easy to view and edit the information. Add related lists to show related records, such as the attendees for an event or the sponsors for an event.