

1.INTRODUCTION

Overview

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in cross -technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

What you'll learn

1. Real Time Salesforce Project
- 2.Object & Relationship in Salesforce
- 3.Create Salesforce Org

Purpose

An event management system within Salesforce allows you to access all relevant data in one centralized location—your database!

You'll be able to manage all event-related tasks without leaving Salesforce, providing you with a seamless and comprehensive event-planning experience.

2.PROBLEM DEFINITION & DESIGN THINKING

Empathy Map

Template



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.

Says

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

An event management system within salesforce allows you to access all relevant data in one centralized location-your database

Salesforce is a powerful Customer Relationship Management (CRM) platform that can be customized to support event management process

A great way to streamline your event planning process and manage all aspects of your events in one place

Using salesforce for post event analysis is a valuable tool for organizers

It is providing a seamless and comprehensive event-planning experience

Building an event management system using salesforce can be a powerful tool for event organizers

Salesforce events allow you to track meetings and other engagements with customers, prospects, etc.,

Using salesforce to create a custom solution that allows you to manage events from start to finish



Build an event management system using salesforce



Salesforce is a highly customizable platform, so you can create custom objects, files, and workflows to meet your event management requirements

You can store and manage information about attendees, sponsors, vendors and other stakeholders in one central location

Easy-to-read formatting and organization

Salesforce provides powerful analytics tools that you can use to analyse event data, including attendance, revenue and engagement

To generate reports and dashboards can help event organizers visualize data by using salesforce

Integrate your events with the leading Customer Relationship Management (CRM)

Your event management software should help you keep track of every aspect and step of the event-planning process

It helps to the process of creating and maintaining an event

Does

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

Thinks

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

Feels

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



Need some inspiration?

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

[Open example](#)



Ideation & Brainstorming Map

Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

10 minutes to prepare
 1 hour to collaborate
 2-8 people recommended

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Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

10 minutes

Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

Set the goal

Think about the problem you'll be focusing on solving in the brainstorming period.

Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#)

1

Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

5 minutes

Understanding an event is a common event problem

Key rules of brainstorming

To run an smooth and productive session:

- Stay in topic.
- Defer judgment.
- Go for volume.
- Encourage wild ideas.
- Listen to others.
- If possible, be visual.

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

10 minutes

Durgadevi M

Learn more about this idea

Dhruvashree M

Learn more about this idea

Deepika A

Learn more about this idea

Jeeva G

Learn more about this idea

Tip

You can select a sticky note and to the period (which is attached to the board) to move it to your board.

Need some inspiration?

See a featured version of this template to get your work started.

[Open example](#)

Share the mood

You can export the mood as an image or pdf to share with members of your company who might find it helpful.

3

Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

20 minutes

Offer benefits

Durgadevi M

Dhruvashree M

Deepika A

Jeeva G

Embrace flexibility

Increase wages

Train the team to do more

Understanding an event

Tip

Add a sentence-like label to sticky notes to make it easier to share relevant information and to make your work more organized.

4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

20 minutes

Importance

Rank your ideas on this grid to determine which ideas are important and which are feasible.

Feasibility

Rank your ideas on this grid to determine which ideas are important and which are feasible.

Tip

Participants can use their own ideas to guide the session. The facilitator can guide the session by using the board and other tools to help the team move forward.

5

After you collaborate

You can export the mood as an image or pdf to share with members of your company who might find it helpful.

Quick add-ons

Share a view link

Share a view link to the mood with stakeholders to keep them in the loop about the outcomes of the session.

Export the mood

Export a copy of the mood as a PDF or PNG to share with stakeholders, include in slides, or save in your drive.

Keep moving forward

Strategy blueprint

Define the components of a new idea or strategy.

Customer experience journey map

Understand customer needs, motivations, and obstacles for an experience.

Strengths, weaknesses, opportunities & threats

Identify strengths, weaknesses, opportunities, and threats (SWOT) to develop a plan.

[Share template feedback](#)

3. RESULT

Data Model

OBJECT NAME	FIELDS IN THE OBJECT	
EVENT	FIELD LABEL	DATA TYPE
	City	Text(30)
	Created By	Lookup(User)
	End Date	Date/Time
	Event Name	Text(80)
	Last Modified By	Lookup(User)
	Owner	Lookup(User,Group)
	Start Date	Date/Time
ATTENDEE	FIELD LABEL	DATA TYPE
	Attendee Name	Text(80)
	Created By	Lookup(User)
	Email	Email
	Event Name	Master-Detail(Event)
	ID	Auto Number
	Last Modified By	Lookup(User)
	Phone	Phone
SPEAKER	FIELD LABEL	DATA TYPE
	Bio	Text Area(255)
	Created By	Lookup(User)
	e-mail	Email
	Event Name	Lookup(Event)
	Last Modified By	Lookup(User)
	Owner	Lookup(User,Group)
	Speaker Name	Text(80)
VENDOR	FIELD LABEL	DATA TYPE
	Created By	Lookup(User)
	e-mail	Email
	Event Name	Lookup(Event)
	Last Modified By	Lookup(User)
	Owner	Lookup(User,Group)
	Phone	Phone
	Sevice Provider	Text(30)

	Vendor Name	Text(80)	
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STUDENT	Created By	Lookup(User)	
	Last Modified By	Lookup(User)	
	Owner	Lookup(User,Group)	
	Student Name	Text(80)	
	Tickets	Picklist	

ACTIVITY & SCREENSHOTS

ACTIVITY 1:[EVENT]

Browser tabs: New Attendees with events Rep..., Event | Salesforce

URL: <https://muthurangamgovernmentartsc8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kCmp/Details/view>

Search Setup

Setup Home Object Manager

Event

Details

Description

API Name: Event_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

Edit Delete

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Type here to search

Browser tabs: New Attendees with events Rep..., Event | Salesforce

URL: <https://muthurangamgovernmentartsc8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kCmp/FieldsAndRelati...>

Search Setup

Setup Home Object Manager

Event

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City_c	Text(30)		<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		<input type="checkbox"/>
End Date	End_Date__c	Date/Time		<input type="checkbox"/>
Event Name	Name	Text(80)		<input checked="" type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Start Date	Start__c	Date/Time		<input type="checkbox"/>

Type here to search

ACTIVITY 2:[ATTENDEE]

Browser tabs: New Attendees with events Rep..., Attendee | Salesforce

Address bar: <https://muthurangamqovernmentarts8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0T1Zw0U0U3kCnt/Details/new>

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Attendee

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout

Details

Edit Delete

Description

API Name: Attendee__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

Details

Fields & Relationships
7 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		<input checked="" type="checkbox"/>
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Event Name	Event_Name__c	Master-Detail(Event)		<input checked="" type="checkbox"/>
ID	ID__c	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Phone	Phone__c	Phone		

ACTIVITY 3:[SPEAKER]

Browser tabs: New Attendees with events Repo... Speaker | Salesforce

URL: https://muthurangamgovernmentarts8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00003kCnO/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Speaker

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout

Details

Edit Delete

Description

API Name: Speaker__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

Type here to search

Browser tabs: New Attendees with events Repo... Speaker | Salesforce

URL: https://muthurangamgovernmentarts8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00003kCnO/FieldsAndRelat...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Speaker

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout

Fields & Relationships

7 Items, Sorted by Field Label

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bio	Bio__c	Text Area(255)		<input type="checkbox"/>
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		<input type="checkbox"/>
Event Name	Event__c	Lookup(Event)		<input checked="" type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Speaker Name	Name	Text(80)		<input checked="" type="checkbox"/>

Type here to search

ACTIVITY 4:[VENDOR]

The screenshot displays the Salesforce Setup interface for the 'Vendor' object. The browser address bar shows the URL: <https://muthurangamqovernmentarts8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0T1zW0U0U3kCnn/Details/view>. The page title is 'Vendor' under 'SETUP > OBJECT MANAGER'. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout.

The 'Details' section shows the following information:

- Description: (Empty field)
- API Name: Vendor__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

The 'Fields & Relationships' section shows a table of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains 8 rows of fields.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		<input type="checkbox"/>
Event Name	Event_Name__c	Lookup(Event)		<input checked="" type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Phone	Phone__c	Phone		<input type="checkbox"/>
Service Provider	Service__c	Text(30)		<input type="checkbox"/>
Vendor Name	Name	Text(30)		<input checked="" type="checkbox"/>

ACTIVITY 5:[STUDENT]

Browser tabs: New Attendees with events Repor... Student | Salesforce

Address bar: <https://muthurangamgovernmentarts8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0U00U3kHSZ/Details/view>

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Student

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View, Button Layout

Details

Edit Delete

Description

API Name: Student__c

Custom: ✓

Singular Label: Student

Plural Label: Students

Enable Reports: ✓

Track Activities

Track Field History

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Windows taskbar: Type here to search, 23:09 17-04-2023

Browser tabs: New Attendees with events Repor... Student | Salesforce

Address bar: <https://muthurangamgovernmentarts8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0U00U3kHSZ/FieldsAndRelati...>

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Student

Details

Fields & Relationships

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View, Button Layout

5 Items, Sorted by Field Label

Quick Find

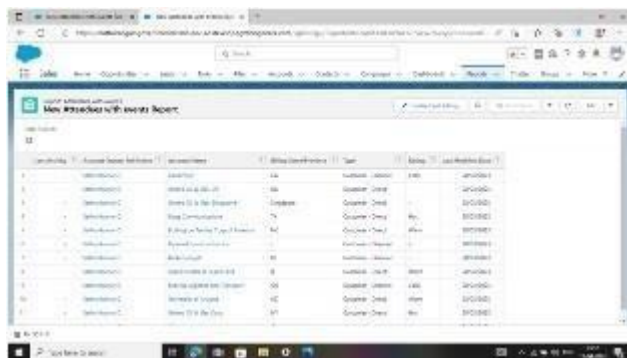
New Deleted Fields Field Dependencies Set History Tracking

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)		✓
Student Name	Name	Text(80)		✓
Tickets	Tickets__c	Picklist		

ACTIVITY 6:[USERS]



ACTIVITY 7:[REPORTS]



4. TRAILHEAD PROFILE PUBLIC URL

Team Lead -

<https://www.salesforce.com/trailblazer/dhakashinaprabup>

Team Member 1 -

<https://www.salesforce.com/trailblazer/jaishankerbg0rm8xxyx56o>

Team Member 2 –

<https://www.salesforce.com/trailblazer/pushparajski4hgyqv3qno>

Team Member 3 –

<https://www.salesforce.com/trailblazer/kumaravel4324>

5. ADVANTAGE & DISADVANTAGE

ADVANTAGES:

***Customizable:** Salesforce allows for a high degree of customization, so you can tailor the event management system to your specific needs

***Centralized Data:** All data related to an event, including attendees, vendors, sponsors, and budget can be stored in a single location within Salesforce.

***Collaboration:** Salesforce allows multiple team members to work together on an event and collaborate in real-time.

***Reporting:** With Salesforce, you can generate reports and analytics that provide insights into event performance, such as attendance and revenue.

DISADVANTAGES:

***Cost:** Salesforce can be expensive, especially if you need to customize it extensively for your event management needs.

***Complexity:** Salesforce can be complex to set up and use, especially for those who are not familiar with the platform.

***Training:** If your team is not familiar with Salesforce, it may take some time and resources to train them on how to use the platform effectively.

6.APPLICATIONS

1. Define the requirements: Determine the business requirements for the management system, including the types of data to be managed, the workflows, and the reporting requirements.

2. Configure Salesforce: Configure the Salesforce platform to meet the requirements of the management system. This can involve customizing fields, creating new objects, setting up workflows and rules, and configuring security settings.

3. Install Salesforce applications: Install any necessary Salesforce applications that will enhance the functionality of the management system. For example, you

may need to install an accounting or project management application.

4. Integrate with external systems: If necessary, integrate the management system with external systems, such as marketing automation or e-commerce platforms.

5. Test and deploy: Test the management system to ensure that it meets the business requirements and is functioning correctly. Once testing is complete, deploy the system to users.

6. Train users: Train users on how to use the management system effectively. This can involve creating documentation, providing online training materials, or conducting in-person training sessions.

7. Monitor and maintain: Monitor the system to ensure that it continues to meet business requirements and that data is being managed correctly. Perform regular maintenance tasks, such as archiving old data or upgrading Salesforce applications, to ensure that the system continues to function properly.

7. CONCLUSION

Building an event management system using Salesforce can provide many benefits, including customizable workflows, centralized data management, collaboration, reporting, and integration with other tools. However, it is important to consider the potential disadvantages, such as cost, complexity, limited functionality, and security concerns, when making the decision to build an event management system using Salesforce.

8. FUTURE SCOPE

1. AI and automation: Salesforce has already integrated artificial intelligence and automation features into its platform, and these capabilities could be leveraged to enhance event management systems. For example, AI could be used to analyze attendee data and provide insights into attendee behavior, while automation could be used to streamline repetitive tasks such as registration and communication.

2. Mobile and social capabilities: As more people use mobile devices and social media to engage with events, future event management systems built on Salesforce could incorporate mobile and social capabilities to enhance the attendee experience. This could include mobile event apps that provide real-time information and engagement opportunities, or social media integrations that allow attendees to share their experiences and connect with others.

3. Virtual and hybrid events: The COVID-19 pandemic has accelerated the trend towards virtual and hybrid events, and future event management systems built on Salesforce could incorporate these capabilities to provide a seamless virtual event experience. This could include features such as virtual event platforms, live streaming, and virtual exhibitor booths.

4. Analytics and data visualization: As data becomes more important in event management, future event management systems built on Salesforce could incorporate advanced analytics and data visualization capabilities. This could include real-time dashboards that provide insights into event performance, or predictive analytics that help event organizers anticipate attendee behavior.

5. Integration with IoT devices: As the Internet of Things (IoT) continues to grow, future event management systems built on Salesforce could integrate with IoT devices to enhance the attendee experience. For example, RFID-enabled badges could be used to track attendee behavior and provide personalized recommendations, or beacons could be used to guide attendees through the event space.