BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

1. INTRODUCTION

1.1. OVERVIEW

Event management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post-event strategizing. At the start, an event manager makes planning decisions, such as the time, location, and theme of their event. During an event, event managers oversee the event live and make sure things run smoothly. After an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and staying on the ball for any post-event offerings

All different branches of planning go into event management, including various types of sourcing, designing, regulation checks, and on-site management. In event management, you could be in the process of creating a conference, a product launch, an internal sales kick-off, or even a wedding. Really, any event that requires considerable planning and execution is event management.

Salesforce is the one of the best options to make any projects like build an even management system, CRM projects and so on. In Salesforce we make any projects easily, because there is almost every function needed to create an event, management and etc. are built in.

Anyone can create this project, this is the most important thing to make this project in Salesforce.

1.2. PURPOSE

The purpose of an event management system is to help individuals and organizations plan, organize, and execute events more efficiently and effectively. Event management systems offer a range of tools and features that facilitate the entire event lifecycle, from planning and registration to post-event analysis.

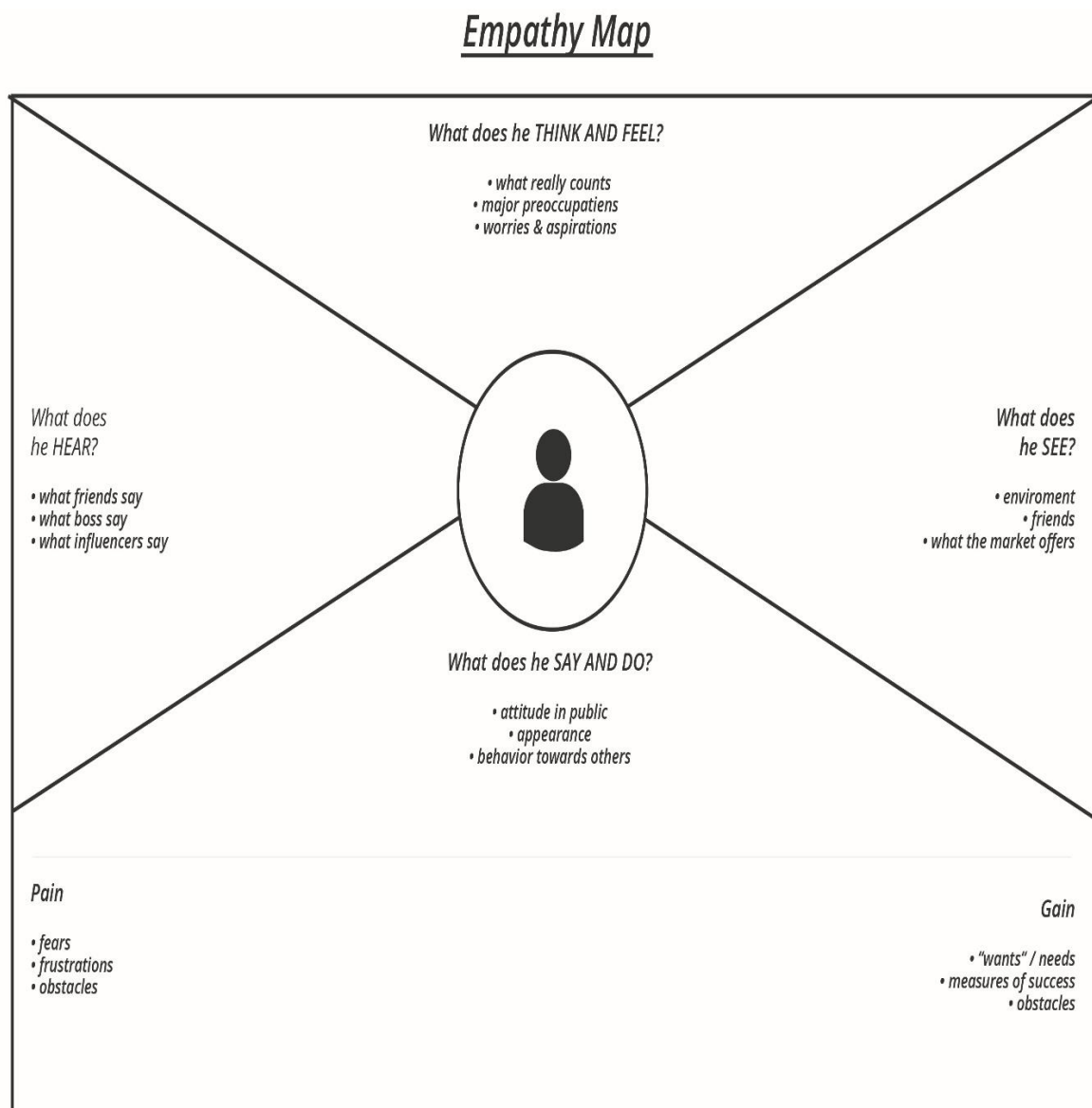The primary objectives of an event management system are to:

- Simplify the event planning process: Event management systems provide users with easy-to-use tools and templates to help them plan and execute events with minimal effort.

- Automate time-consuming tasks: An event management system automates many manual and time-consuming tasks such as sending event invitations, tracking registrations, and managing payments.

- Streamline communication: Event management systems help to streamline communication between event organizers and attendees, with features such as automated email reminders, event updates, and chatbots.

- Enhance attendee engagement: An event management system can enhance attendee engagement by providing personalized event experiences, including tailored schedules, networking opportunities, and event feedback.

- Provide actionable insights: Event management systems capture valuable data on event attendance, engagement, and ROI. This data can be used to optimize future events and improve overall event performance.

Overall, the purpose of an event management system is to make event planning and execution more efficient, engaging, and successful.

2. PROBLEM DEFINITION AND DESIGN THINKING

2.1. EMPATHY MAP

An empathy map is a square divided into four quadrants with the user or client in the middle. Each of the four quadrants comprises a category that helps us delve into the mind of the user. The four empathy map quadrants look at what the user says, thinks, feels, and does.

Empathy Map

What does he THINK AND FEEL?

• what really counts
• major preoccupatiens
• worries & aspirations

What does he HEAR?

• what friends say
• what boss say
• what influencers say

What does he SEE?

• enviroment
• friends
• what the market offers

What does he SAY AND DO?

• attitude in public
• appearance
• behavior towards others

Pain

• fears
• frustrations
• obstacles

Gain

• "wants" / needs
• measures of success
• obstacles

EDUCATION

WHO are we empathizing with?
Who is the person we want to understand?
What is the situation they are in?
What is their role in the situation?

- The persons whose are trying to get information from us
- Some financial situation....
- Steps forward and never give up

What do they need to DO?
What do they need to do differently?
What job(s) do they want or need to get done?
What decision(s) do they need to make?
How will we know they were successful?

- Self-Study
- Administrative jobs
- Decisions Based on Experience
- From their performance

What do they HEAR?
What are they hearing others say?
What are they hearing from friends?
What are they hearing from colleagues?
What are they hearing second-hand?

- Available opportunities for Employment
- Improvements
- That are easy ....or that are not easy
- Motives and Encouragements

What do they THINK and FEEL?
What other thoughts and feelings might influence their behavior?

- Does not want to waste time
- Be positive
- Memories of our family while studying abroad
- Lack of teaching

What do they SEE?
What do they see in their immediate environment?
What do they see others saying and doing?
What are they watching and reading?

- Saying is good but Doig is not very well
- Inflation
- Disturbances occurring in the villages through lack of current and water
- Current Affairs

What do they SAY?
What have we heard them say?
What can we imagine them saying?

- We can do it
- Spread advanced techincs

What do they DO?
What do they do today?
What behavior have we observed?
What can we imagine them doing?

- Practice themselves for exams
- Good behaviour
- Say goodluck and wishes them

PAINS
What are their fears, frustrations, and anxieties?

- About the feelings of uneducated people
- No time to eat and purchase with their family

GAINS
What are their wants, needs, hopes, and dreams?

- Want to be an IAS officer
- Hoping bright and a peaceful life

2.2. IDEATION AND BRAINSTORMING MAP

An idea map is a visual representation of your thinking process. It's a tool for planning and organizing your ideas visually that doesn't rely on traditional note-taking. Traditional linear pages of notes can slow down the process of planning a project, but an idea map lays everything out in a clear way that's easy for anyone to understand.

2

Brainstorm

JEYA LAKSHMI V P R

Building an even management system using Salesforce is a great way to streamline our event planning process, manage event details and track attendee information.

Salesforce is a powerful customer relationship management platform that can be customized to fit our specific event management needs.

1. First we need to identify our event management needs and determining the features we want to include in our system.

2. Then we need to create custom objects to store event details,locations and registration information.

3. Using Salesforce we can build workflows and automative repetitive tasks.

4. For example, we can set up automated email reminders to be sent to attendees before an event.

5. Salesforce can be integrated with other systems, such as marketing automation platforms, ticketing systems and social media platforms.

6. By streamlining the event planning process, the system can help to reduce the time and costs involved in planning and executing events.

7. By automating many of the manual tasks involved in event planning, the system can help to reduce the potential for human error and increase the efficiency of event planning processes.

DHIVYAPRABA S G

There are several applications found in our Salesforce platform.

1. We can add fields to the custom object to capture relevant information about the events, such as attendees, speakers, sponsors and sessions.

2. By using this event management project we can create page layouts to display information about the events in an easy-to-understand manner.

3. One of the important uses is automate processes related to events, such as sending confirmation emails to attendees, scheduling reminders, and updating the event status.

4. We can create reports and dashboards to track event performance, such as registration numbers, attendance raters, and feedback from attendees.

5. We can use Salesforces reporting and analytics tools to monitor the performance of your events.

6. We can generate reports on attendance, ticket sales, and other key metrics to help you make data-driven decisions.

7. It is very important to continuously improve our event management system.

8. We can use feedback from attendees and event data to identify areas for improvement and make changes to your system accordingly.

GOKILA K

Generally, the Event Management Software for most commonly used in the field of entertainment, sports, trade shows, and special events.

1. It is a software tool that allows event planners to manage the entire event process, from planning and booking to event coordination and execution.

2. In the management business, we need to handle lots of data.

3. Without the software we will have to maintain all that with papers, which is a little difficult.

4. So, the software will allow us to access and upgrade the data anytime, from anywhere.

5. There are different kinds of data, such as seating charts, lists of names and other information.

6. By using the software, we will arrange all the kinds of data without paper.

7. The software will give real-time analysis. It will also help us to allot the approximate budget as the best event management software.

8. With the event management software development, it will be easier the track of what and when we need to do the tasks and will remind us at the right time.

JANANI P

The built-in website will make us more comfortable and give you accurate data.

1. We can collect the needed information to make the event successful through the website.

2. Our entire online management team can use the platform to collaborate, track engagement, conduct outreach and all the other little tasks that go in our event.

3. We don't have to vet multiple solutions for every phase of our event.

4. During the meeting or any conference, we can use interactive tools to collect questions, poll answers, or shout-outs.

5. After the event is over, our event management software can keep the conservation going.

6. Speaking of improvement, event planning software helps us decide where to make changes to our events based on data, not hunches.

7. Display a greater level of professionalism.

8. In the era of hybrid and virtual events, using purpose-built tools for these events style can help us to maximize our event's potential.

Group ideas

Event infrastructure is must be good.

Target audience and clients.
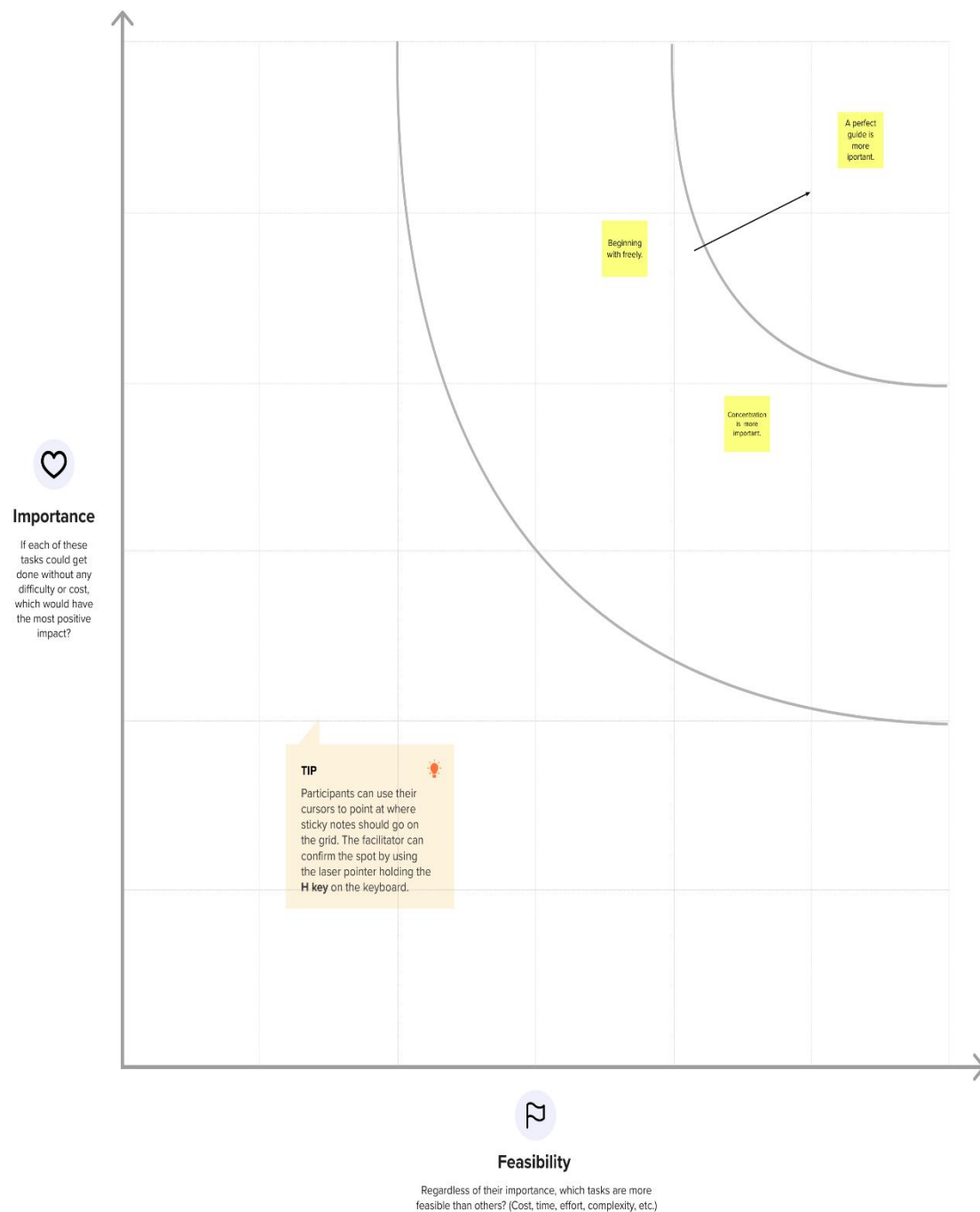
Understand the objective of the event.

Suitable timing is more important.

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

If each of these tasks could get done without any difficulty or cost, which would have the most positive impact?

A perfect guide is more iportant.

Beginning with freely.

Concentration is more important.

TIP

Participants can use their cursors to point at where sticky notes should go on the grid. The facilitator can confirm the spot by using the laser pointer holding the **H key** on the keyboard.

⚑

Feasibility

Regardless of their importance, which tasks are more feasible than others? (Cost, time, effort, complexity, etc.)

3. RESULT

3.1. DATA MODEL

OBJECT NAME	FIELDS IN THE OBJECT	
Event	**FIELD LABEL**	**DATA TYPE**
	City	Text
	Start Date	Date\time
	End Date	Date\time
	Event Name	Master-detail relationship
	Event Name	Look-up relation ship
Attendee	**FIELD LABEL**	**DATA TYPE**
	Id	Auto number
	Phone	phone
	Email	Email
Speaker	**FIELD LABEL**	**DATA TYPE**
	Bio	Text Area
	e-mail	Email
Vendor	**FIELD LABEL**	**DATA TYPE**
	e-mail	Email
	Phone	phone
	Service Provider	Text
	Event Name	Look-up Relationship
Student	**FIELD LABEL**	**DATA TYPE**
	Tickets	Picklist

3.2. ACTIVITY AND SCREENSHOTS

Milestone 1

Activity

Salesforce

Salesforce is our customer success platform, designed to help you sell, service, market, analyse, and connect with our customers.

Creation of Salesforce Organization
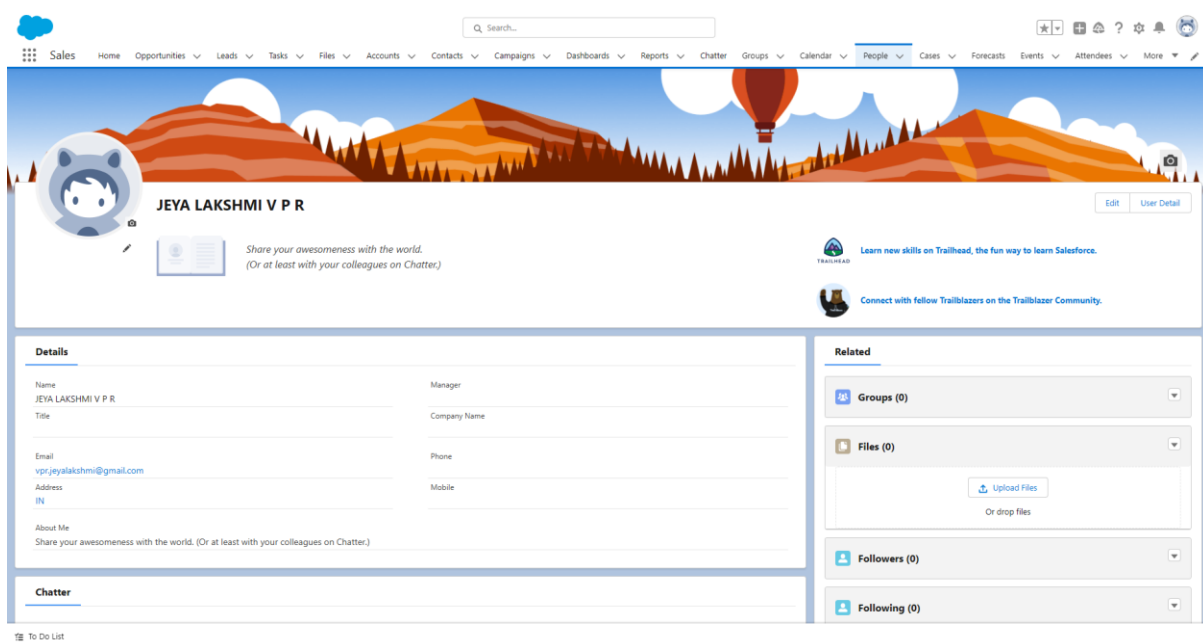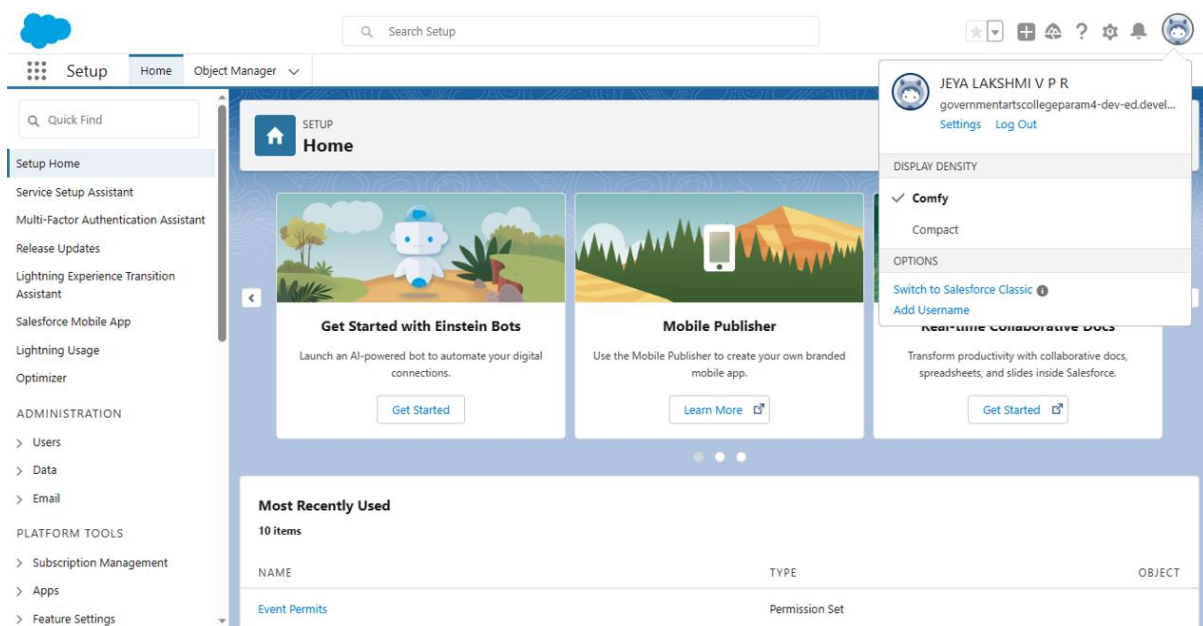
Milestone 2

Activity 1

Object

objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Creation of Custom Objects

Creation of Event Object

Label: Event

Plural Label: Events

Record Name: Event Name
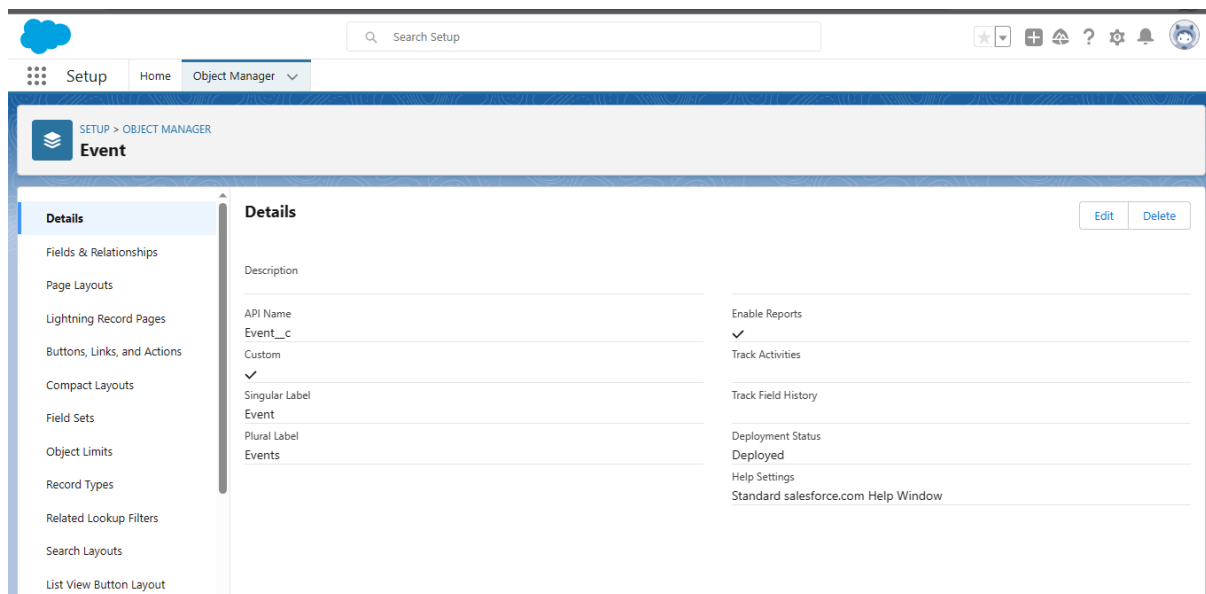
Activity 2: Creation of Attendees Object

Label: Attendee

Plural Label: Attendees

Record Name: Attendee Name
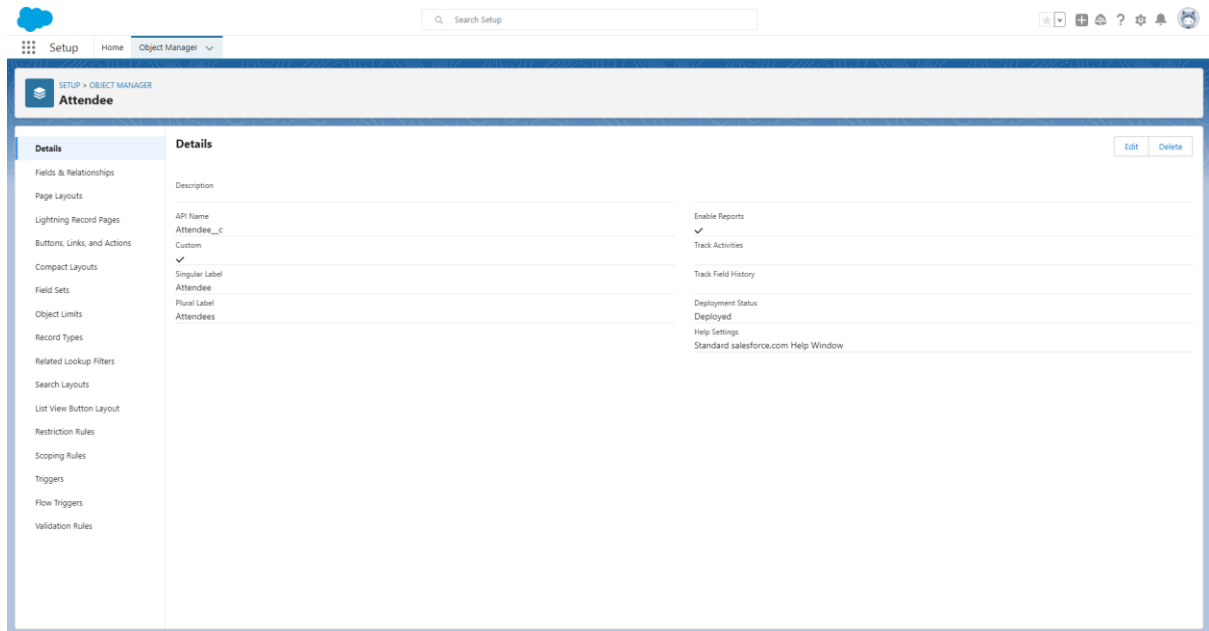
Activity 3

Creation of Speaker object

Label: Speaker

Plural Label: Speakers

Record Name: Speaker Name
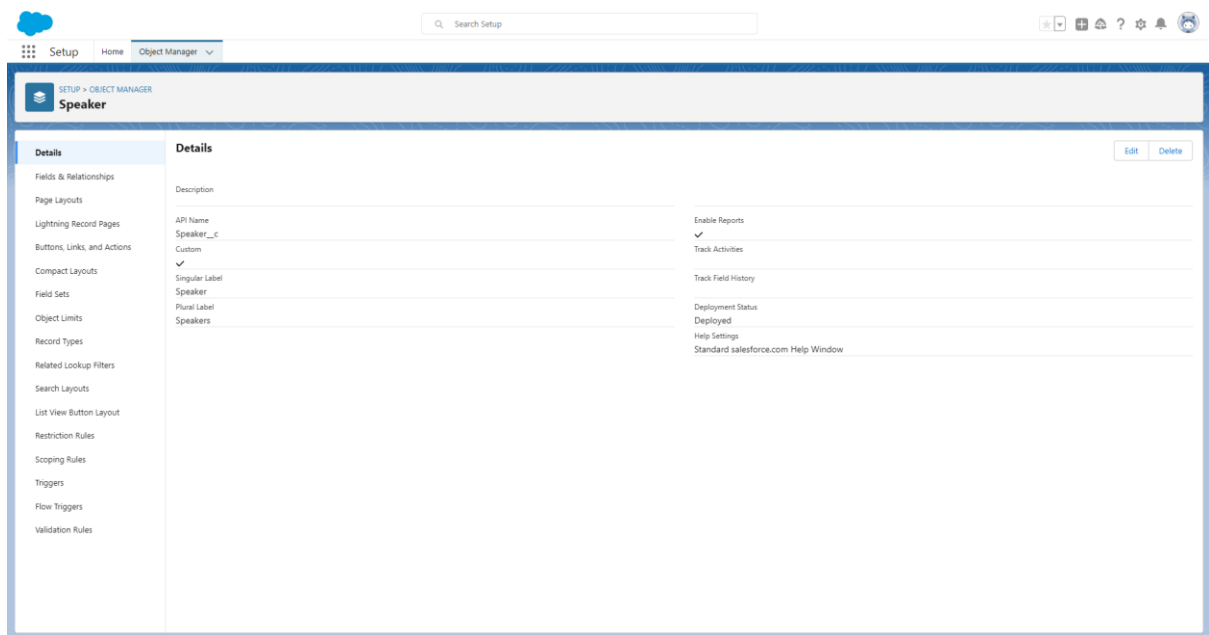
Activity 4

Creation of Vendors object

Label: Vendor

Plural Label: Vendors

Record Name: Vendor Name
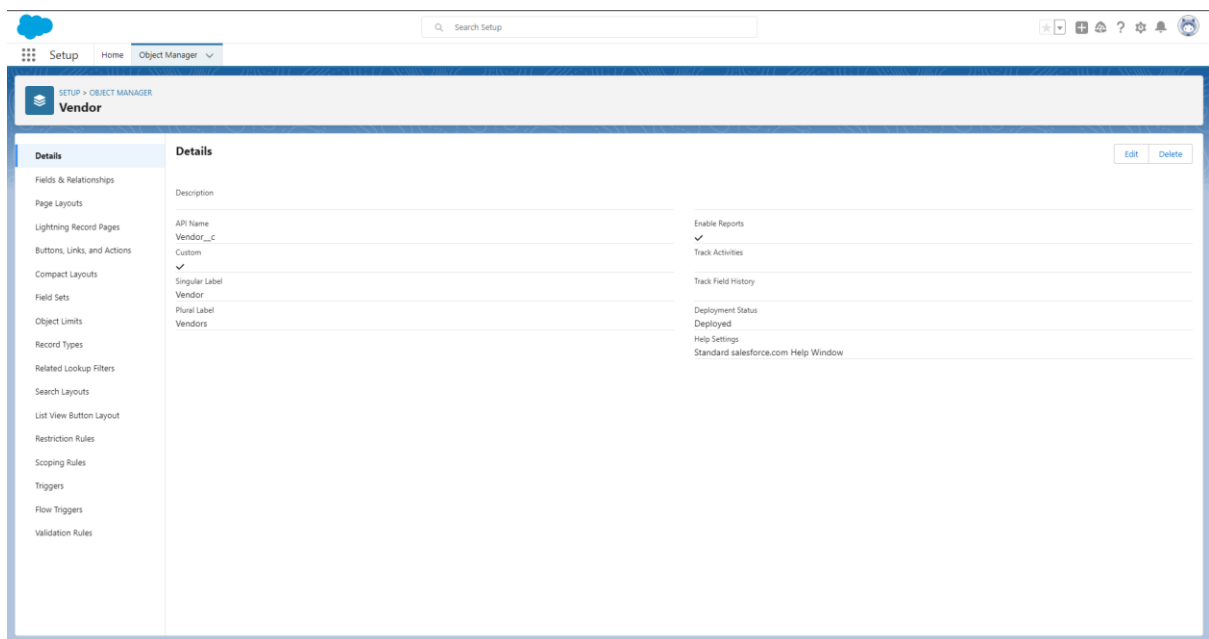
Milestone 3 – Tab

Tab

      Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

Creation of custom tabs

Activity 1

Creation of Event tab
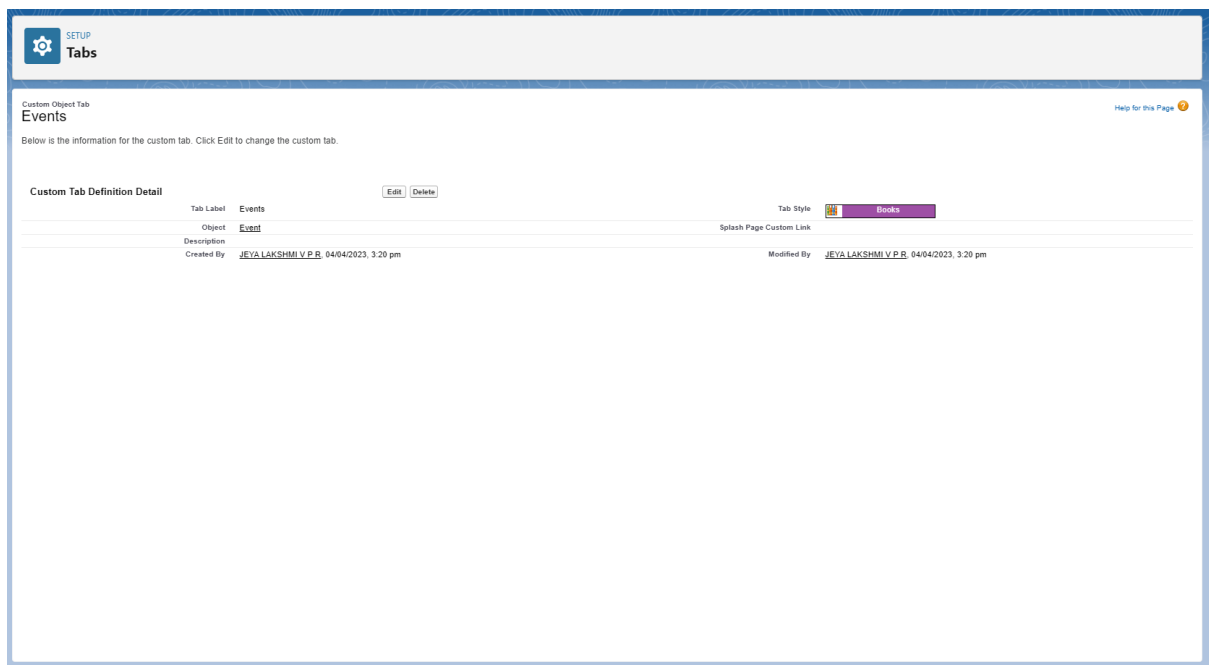
Related with event object, tab style is book

Activity 2:

Creation of Attendee tab:

Related with attendee object, tab style is presenter.

Activity 3

Creation of Speakers tab:

Related with speaker object, tab style is microphone.

Activity 4

Creation of Vendor tab

Related with vendor object, tab style is train.

Milestone 3 – Application

App

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

Creation of custom app

Creation of event management app

Milestone 4 – Fields

Fields

      Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

Activity 1

Creation of fields for the Event objects

Activity 3

Create a master-detail relationship with Event object

Sub-division of activity 4

Create a Look-up relationship with Event object

<table>
<tr><td rowspan="7" align="center">Event</td><td>FIELD LABEL</td><td>DATA TYPE</td></tr>
<tr><td>City</td><td>Text</td></tr>
<tr><td>Start Date</td><td>Date\time</td></tr>
<tr><td>End Date</td><td>Date\time</td></tr>
<tr><td>Event Name</td><td>Master-detail relationship</td></tr>
<tr><td>Event Name</td><td>Look-up relation ship</td></tr>
</table>

SETUP > OBJECT MANAGER
Event

Details	**Fields & Relationships** 8 Items, Sorted by Field Label				Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
City	City__c	Text(4)			▼
Created By	CreatedById	Lookup(User)			
End Date	End_Date__c	Date/Time			▼
Event Name	Event_Name_c__c	Lookup(Event)		✓	▼
Event Name	Event_Name__c	Master-Detail(Engagement Channel Type)		✓	▼
Event Name	Name	Text(80)		✓	▼
Last Modified By	LastModifiedById	Lookup(User)			
Start Date	Start_Date__c	Date/Time			▼

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
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Activity 2

Creation of fields for the Attendees objects

Attendee	**FIELD LABEL**	**DATA TYPE**
	Id	Auto number
	Phone	phone
	Email	Email

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Attendee Name	Name	Text(80)		✓	▼
Created By	CreatedById	Lookup(User)			
Email	Email__c	Email			▼
Event Name	Event_Name__c	Master-Detail(Event)		✓	▼
Id	Id__c	Auto Number			▼
Last Modified By	LastModifiedById	Lookup(User)			
Phone	Phone__c	Phone			▼
Tickets	Tickets__c	Picklist			▼

Sub-division of activity 2

Creation of field for the student object

Student	**FIELD LABEL**	**DATA TYPE**
	Tickets	Picklist

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
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Fields & Relationships
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 4

Creation of fields for the Speakers objects

Speaker	FIELD LABEL	DATA TYPE
	Bio	Text Area
	e-mail	Email

Fields & Relationships
7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bio	Bio__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		
Event Name	Event_Name__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Speaker Name	Name	Text(80)		✓

Activity 5

Creation of fields for the Vendors objects

	FIELD LABEL	DATA TYPE
Vendor	e-mail	Email
	Phone	phone
	Service Provider	Text
	Event Name	Look-up Relationship

Milestone 5 – Profile

Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

Activity 1

Creation of event user profile

Activity 2

Creation of Event vendors profile

Milestone 6 – User

User

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Activity 1

Creating a User

- First Name: Sanjay
- Last Name: Gupta
- Alias: Sanj
- Email: vpr.jeyalakshmi@gmail.com
- Username: sanjaygupta22@thesmartbridge.com
- Nickname: Sanju
- Role: leave it as default
- User License: Salesforce
- User Profile: event user profiles

Activity 2

• First Name: Rahul

• Last Name: Sharma

• Alias: Rahus

• Email: vpr.jeyalakshmi@gmail.com

• Username: rahulsharma202@thesmartbridge.com

• Nickname: Rahu

• Role: leave it as default

• User License: Salesforce

• Profile: Event vendors profile

Milestone 7 – Permission sets

Permission set

A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Create permission sets to grant access among logical groupings of users, regardless of their primary job function. For example, let's say you have several users who must delete and transfer leads. You can create a permission set based on the tasks that these users must perform and include the permission set within permission set groups based on job functions.

Activity 1

Creation of event permits permission set

Activity 2

Creation of vendor permits permission set

Permission Set
Vendor Permits

Video Tutorial | Help for this Page

| Find Settings... | Clone | Edit Properties | Manage Assignments |

Permission Set Overview

Description		API Name	Vendor_Permits
License		Namespace Prefix	
Session Activation Required	☐	Created By	JEYA LAKSHMI V P R, 10/04/2023, 10:21 am
Last Modified By	JEYA LAKSHMI V P R, 10/04/2023, 10:21 am		

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
Learn More

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

Named Credential Access
Permissions to authenticate against named credentials

Custom Permissions
Permissions to access custom processes and apps

Custom Metadata Types
Permissions to access custom metadata types

Custom Setting Definitions
Permissions to access custom settings

System

Milestone 8 - Reports

Reports

      Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

Activity 1

Report Name: Attendees with event

4. TRAILHEAD PROFILE PUBLIC URL

Team Lead: https://trailblazer.me/id/jevpr

Team Member 1:   https://trailblazer.me/id/gokik2

Team Member 2:   https://trailblazer.me/id/janpa8

Team Member 3:   https://trailblazer.me/id/sdhivyapraba

5. ADVANTAGES AND DISADVANTAGES

Advantages

1. Students can gain knowledge to solve a problem and know the solutions.
2. Students will gain communication and team-player skills.
3. Opportunities for creativity.
4. Ability to work on different event.
5. Change to work with diverse clients.
6. Collaborative work environment.
7. High projection for job growth.
8. Lot of knowledge base.
9. Easy to create events and objects

Disadvantages

1. This project needs a system to fulfil it.
2. Sometimes signal is rarely appearing due to server problem.
3. Unconventional work hours.
4. Time away from family and friends.
5. Experience requirements.
6. Multiple events at the same time.
7. High level of responsibility.

6. APPLICATIONS

- Corporate events: Event management systems are commonly used for planning and executing corporate events such as conferences, seminars, and product launches.
- Trade shows: Event management systems can help trade show organizers manage booth reservations, exhibitor registrations, and event logistics.
- Sporting events: Event management systems are used to manage ticket sales, event promotions, and scheduling for sporting events such as marathons, tournaments, and competitions.
- Fundraising events: Event management systems can be used to manage donor registrations, event marketing, and donation processing for fundraising events such as charity galas and benefit concerts.
- Social events: Event management systems can be used to manage guest lists, send invitations, and track RSVPs for social events such as weddings, birthday parties, and reunions.

7. CONCLUSION

In this project we learned about objects, fields, tabs, apps, profile and so on in salesforce. We created events, objects, fields, tabs, apps, profile in salesforce by the knowledge we gained during this project and how to use them. Event management systems are powerful tools that help individuals and organizations plan, organize, and execute events more efficiently and effectively. These systems offer a range of features and functionalities that automate many time-consuming tasks, streamline communication, enhance attendee engagement, and provide valuable insights for future event planning.

8. FUTURE SCOPE

future scope of event management systems is promising, as technology continues to advance and new innovations emerge. Here are some:

- Hybrid events: The rise of remote work, hybrid events that combine both in-person and virtual components are likely to become more popular. Event management systems will need to adapt to accommodate this shift, with features for live streaming, virtual networking, and remote attendance.
- Artificial intelligence: The use of artificial intelligence (AI) in event management systems can help automate many tasks such as attendee matchmaking, event recommendations, and personalized content delivery.
- Augmented reality: Augmented reality (AR) can enhance the attendee experience by providing interactive event displays, real-time translation, and virtual tours.
- Sustainability: As the importance of sustainability continues to grow, event management systems can play a crucial role in helping organizers reduce waste, carbon footprint, and energy consumption.
- Gamification: Gamification elements such as scavenger hunts, leader boards, and rewards can make events more engaging and interactive for attendees.

Overall, the future scope of event management systems is wide-ranging and exciting, with the potential to revolutionize the way events are planned, executed, and experienced.