

BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

INTRODUCTION

1.1 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.

1.2 Purpose

A custom event management application in Salesforce can make managing events a lot easier. We've seen clients struggle with challenges in four main areas.

Logistics — From security to catering to facilities staff, there are many moving parts that need to align, and they're usually time-sensitive. Plus, you may have a range of equipment coming into the space, from technical and A/V components to industrial kitchen tools and catering appliances.

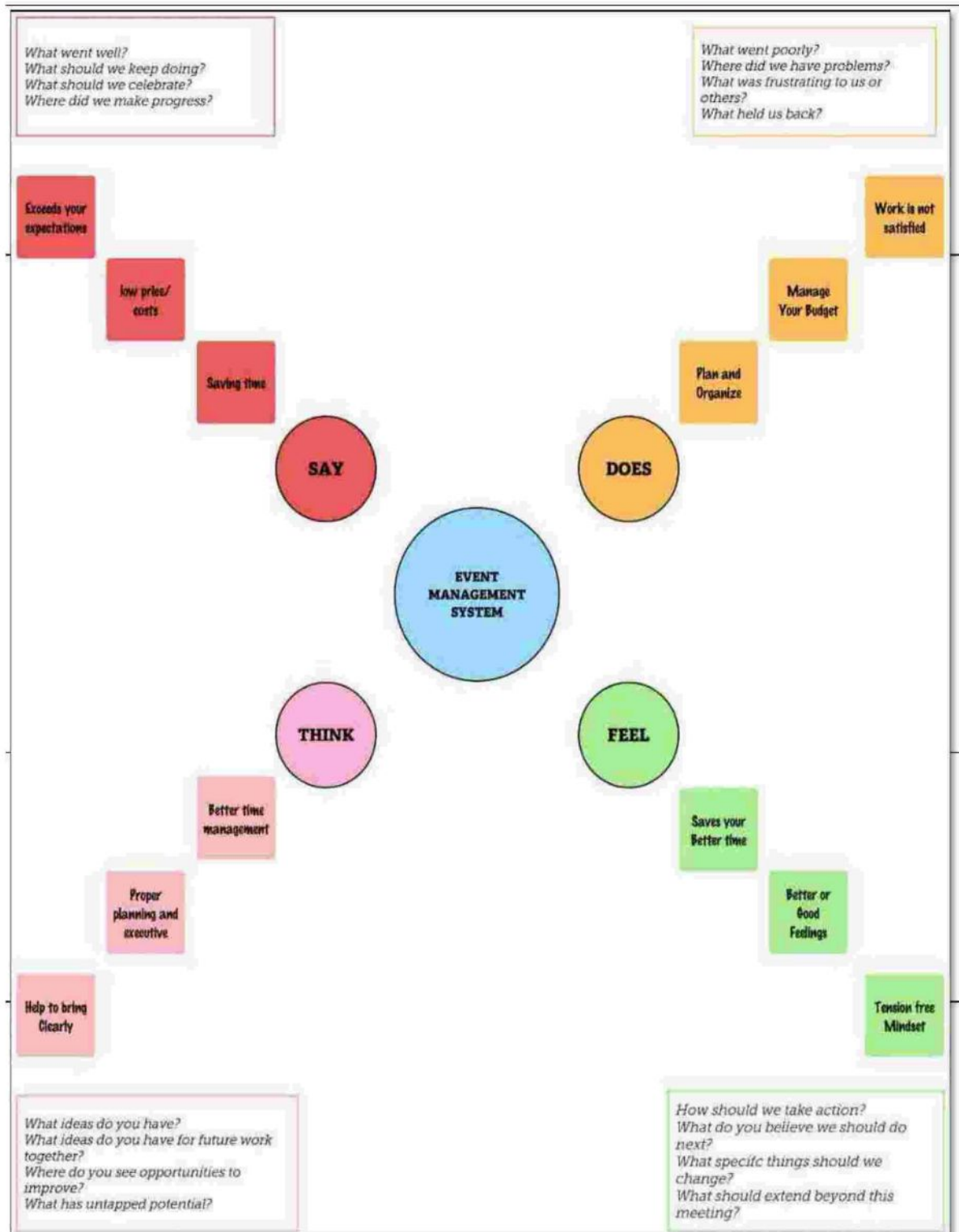
Communication — communications serve as the foundation of your entire event. Every event organizer's worst nightmare is running an event where no one shows up. Every event organizer's second-worst nightmare is running an event where a group of people get the wrong message and forget to show up / show up at the wrong time / go to the wrong place, etc. But with so many stakeholders, from staff to speakers to attendees, event communications are often more complicated than sending out the occasional email.

Marketing — Most event organizers don't have a native place for event listings, so they use third-party platforms like Eventbrite or Splash or Eventzilla. These platforms are all perfectly decent, but they don't allow for much customization. What if your event requires attendees to apply and be accepted only after their application is reviewed? What if you want to feature your logo or other partner logos prominently on the event listing? Marketing an event is more challenging when you're unhappy with your customization capabilities.

Personalization — Every business is unique. You probably want to see your events info in the context of your leads, contacts, opportunities, etc. which means you'll need to integrate any event management apps you use with your database. In doing so you might run into compatibility issues, certain apps might not be available in Salesforce's AppExchange, or you might not have the resources on your team to build a custom integration if it's needed.

PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



RESULT

3.1 Data Model

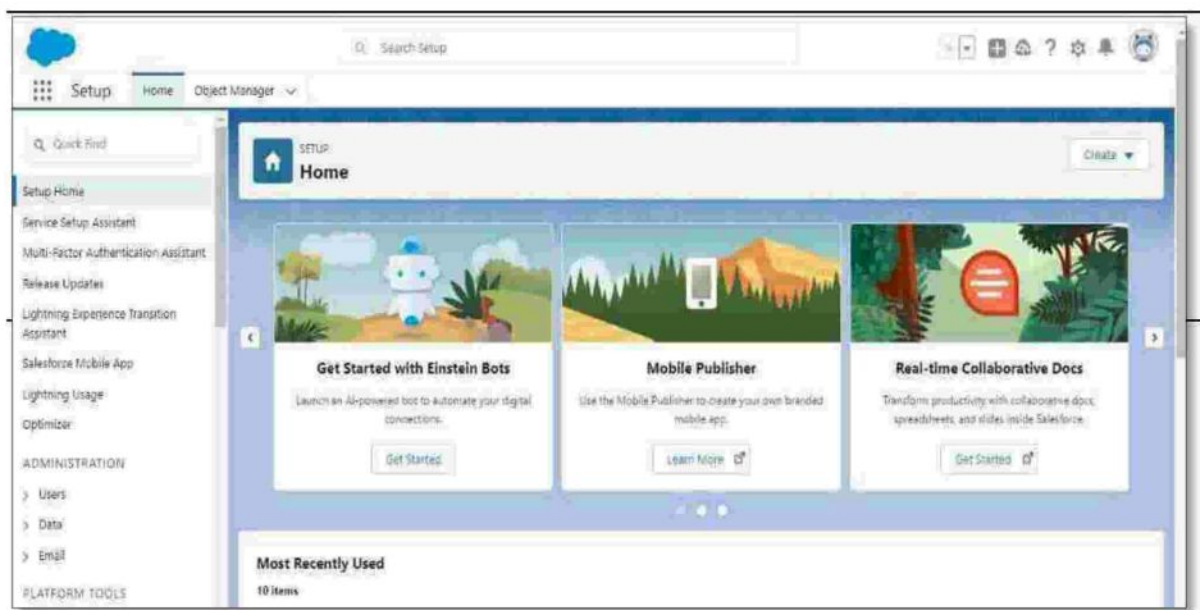
OBJECT NAME	FIELDS IN THE OBJECT	
Event	Field Label	Data Type
	City	Text Area
	Date/Time	Start Date
	Event Name	Master-Detail Relationship

Attendees	<table border="1"> <thead> <tr> <th>Field Label</th><th>Data Type</th></tr> </thead> <tbody> <tr> <td>Id</td><td>Auto Number</td></tr> <tr> <td>Phone</td><td>Phone</td></tr> <tr> <td>Email</td><td>Email</td></tr> <tr> <td>Tickets</td><td>Picklist</td></tr> </tbody> </table>	Field Label	Data Type	Id	Auto Number	Phone	Phone	Email	Email	Tickets	Picklist
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Speakers	<table border="1"> <thead> <tr> <th>Field Label</th><th>Data Type</th></tr> </thead> <tbody> <tr> <td>Bio</td><td>Text Area</td></tr> <tr> <td>Email</td><td>Email</td></tr> <tr> <td>Event Name</td><td>Look-Up Relationship</td></tr> </tbody> </table>	Field Label	Data Type	Bio	Text Area	Email	Email	Event Name	Look-Up Relationship		
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Event Name	Look-Up Relationship										
Vendors	<table border="1"> <thead> <tr> <th>Field Label</th><th>Data Type</th></tr> </thead> <tbody> <tr> <td>Email</td><td>Email</td></tr> <tr> <td>Phone</td><td>Phone</td></tr> <tr> <td>Service Provider</td><td>Text</td></tr> <tr> <td>Event Name</td><td>Look-Up Relationship</td></tr> </tbody> </table>	Field Label	Data Type	Email	Email	Phone	Phone	Service Provider	Text	Event Name	Look-Up Relationship
Field Label	Data Type										
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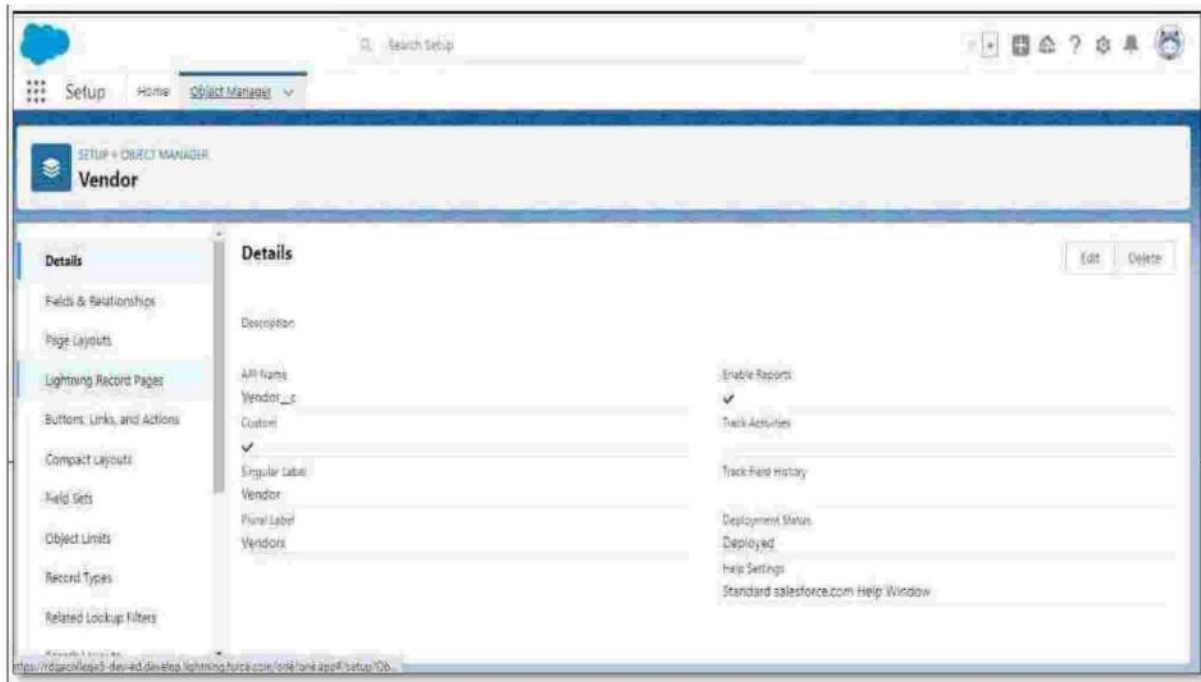
3.1 Activity & Screenshot

1. Salesforce

Home page

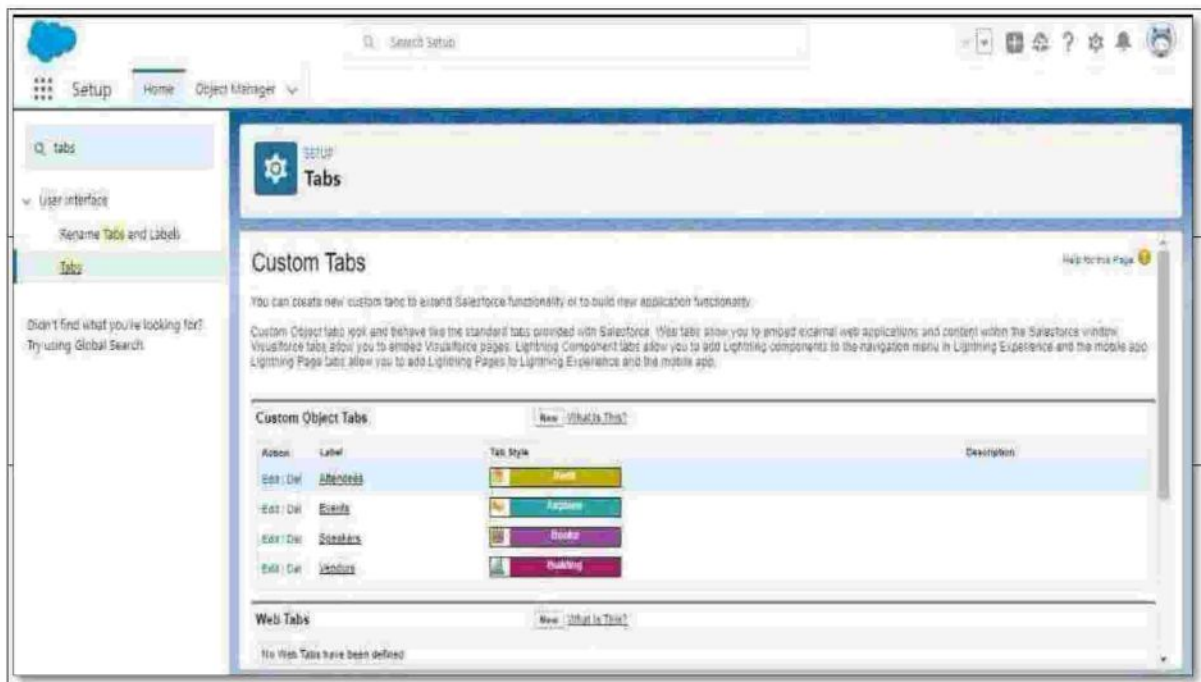


2. Objects

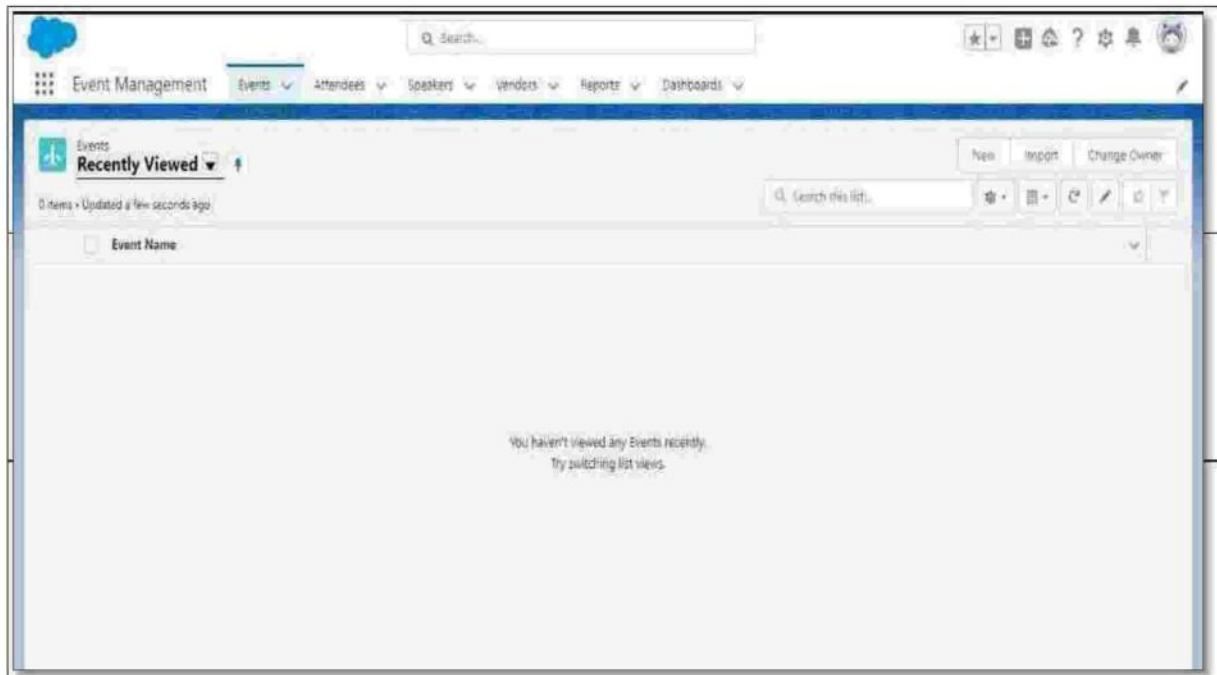


3. Tab

Custom Tabs



Application



4. Fields

The screenshot shows the 'Object Manager' interface. The top navigation bar includes a search bar and several menu items: Setup, Home, and Object Manager. The main content area is titled 'Object Manager' and shows a message: '30 Items Sorted by Label'. Below this, there is a table with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			
Work Step	WorkStep	Standard Object			
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object			
Work Plan Template	WorkPlanTemplate	Standard Object			
Work Plan	WorkPlan	Standard Object			
Work Order Line Item	WorkOrderLineItem	Standard Object			
Work Order	WorkOrder	Standard Object			

5. Profile

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories like Users, Data, Feature Settings, Marketing, Sales, and Products. The main content area is titled 'Profiles' and includes a search bar, a 'New Profile' button, and a table of existing profiles. The table has columns for Action, Profile Name, User License, and Custom. The 'Profiles' page is currently selected in the sidebar.

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Customer Portal Manager Custom	Customer Portal Manager Custom	
<input type="checkbox"/>	Customer Portal Manager Standard	Customer Portal Manager Standard	
<input type="checkbox"/>	event user profile	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	event vendors profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	External Apps Login User	External Apps Login	
<input type="checkbox"/>	External Identity User	External Identity	
<input type="checkbox"/>	Force.com - App Subscription User	Force.com - App Subscription	
<input type="checkbox"/>	Force.com - Free User	Force.com - Free	
<input type="checkbox"/>	Gold Partner User	Gold Partner	

6. User

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a navigation menu with categories 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 is titled 'All Users' and includes a search bar, a 'New User' button, and a table of existing users. The 'Users' page is currently selected in the sidebar.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Event	Chatter	chatter.00000000000000000000000000000000@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	event user	event	eventuser@theeventcloud.com		<input checked="" type="checkbox"/>	event user profile
<input type="checkbox"/>	System Administrator	Admin	admin@theeventcloud.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	event vendors	vendors	eventvendors@theeventcloud.com		<input checked="" type="checkbox"/>	event vendors profile
<input type="checkbox"/>	Analytics Cloud Integration User	Analytics	analytics@theeventcloud.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Analytics Cloud Session User	Analytics	analytics@theeventcloud.com		<input checked="" type="checkbox"/>	Analytics Cloud Session User

7. Permission sets

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Feature Settings, Digital Experiences, Settings, Functions, Sales, Accounts, Person Accounts, Salesforce Scheduler, Assignment Policies, and Salesforce Scheduler. The main content area is titled 'Permission Sets' and shows a 'Create' form. The form has fields for Label, API Name, and Description. Below these fields is a checkbox for 'Session Activation Required'. At the bottom, there is a section titled 'Select the type of users who will use this permission set' with instructions on how to choose between 'None', 'Specific user license', and 'Specific permission set license'.

Setup

Permission Sets

Create

Save Cancel

Enter permission set information

Label

API Name

Description

Session Activation Required

Select the type of users who will use this permission set

Who will use this permission set?

Choose 'None' if you plan to assign this permission set to multiple users with different user and permission set licenses.
Choose a specific user license if you want users with only one license type to use this permission set.
Choose a specific permission set license if you want this permission set license auto-assigned with the permission set.

8. Reports

The screenshot shows the Salesforce Reports page. The left sidebar contains a navigation menu with options like Reports, Recent, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, and All Favorites. The main content area is titled 'All Reports' and shows a table of reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. There are two reports listed: 'New Attendees Report' and 'Sample Flow Report: Screen Flows'.

Event Management

Reports

All Reports

2 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Attendees Report		Private Reports	Sathish Mejjappan	12/4/2023, 10:24 pm	
Created by Me	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	29/3/2023, 8:15 pm	

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Trailhead Profile Public URL

- **Team Lead** - <https://trailblazer.me/id/sathishrdm>
- **Team Member 1** - <https://trailblazer.me/id/vallarasurdm>
- **Team Member 2** - <https://trailblazer.me/id/anbarasanrdm>
- **Team Member 3** - <https://trailblazer.me/id/ranjanirdm>
- **Team Member 4** - <https://trailblazer.me/id/bharathirdm>

ADVANTAGES

- Easier event management. A dedicated event platform makes the entire event easier to manage.
- Saves time.
- Cut costs.
- Increase engagement.
- Analyze and improve.
- Automate your event.
- Display a greater level of professionalism.
- Take a holistic approach to event management.

DISADVANTAGES

- Unconventional work hours.
- Time away from family and friends.
- Experience requirements.
- Job instability.
- Multiple events at the same time.
- High level of responsibility.

APPLICATIONS

- An Event Management System (or Event Management Software) helps organizers plan, execute and report on events, driving success for their business.

CONCLUSION

- Event Management System is user friendly and cost effective system, it is customized with activities related to event management life-cycle. It provides a new edge to management industry.
- Solution Dot always keep your objectives and goals on top priority while developing any plan of work.

FUTURE SCOPE

- The scope of event management as a career in India is immense. This career provides a unique opportunity to rephrase our social beliefs.
- Hosting events can redesign the structure of a city by facilitating economic growth, employment opportunities, urban development, and promoting indigenous culture and heritage.