

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.

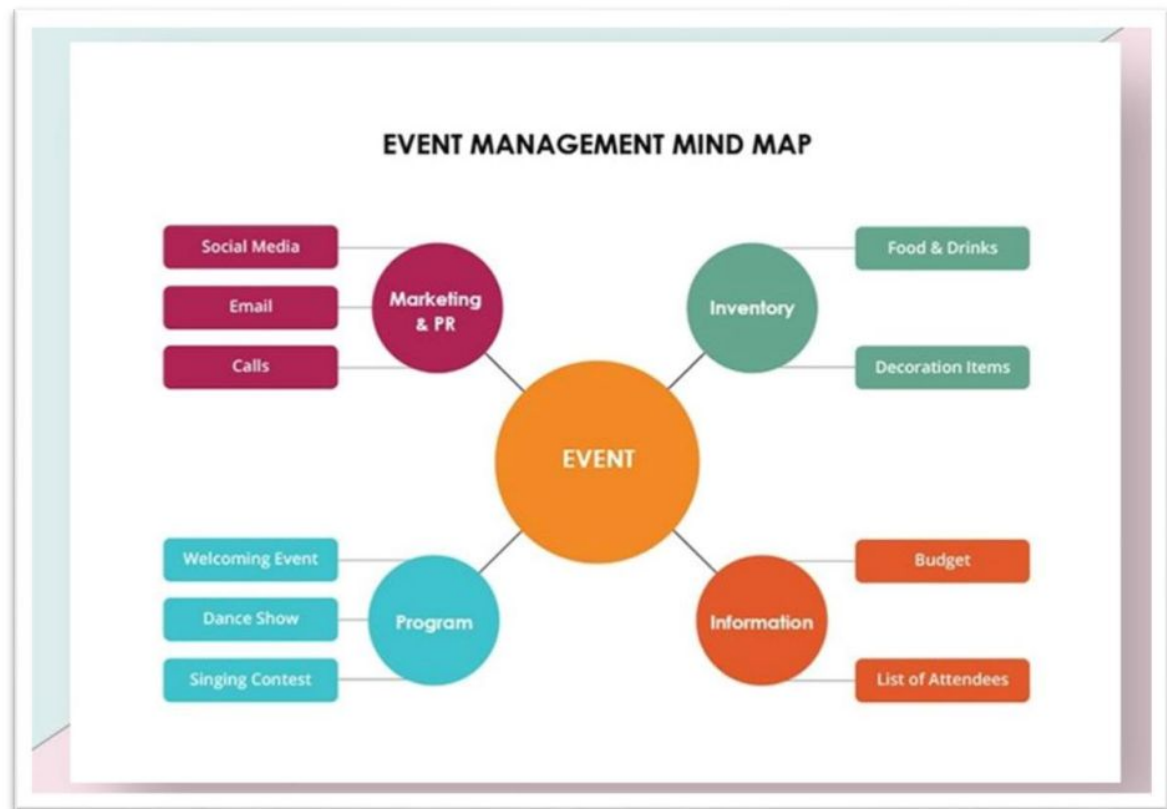
Personalization — Every business is unique. You probably want to see your events info in the context of your leads, contacts, opportunities, etc. which means you'll need to integrate any event management apps you use with your database. In doing so you might run into compatibility issues, certain apps 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

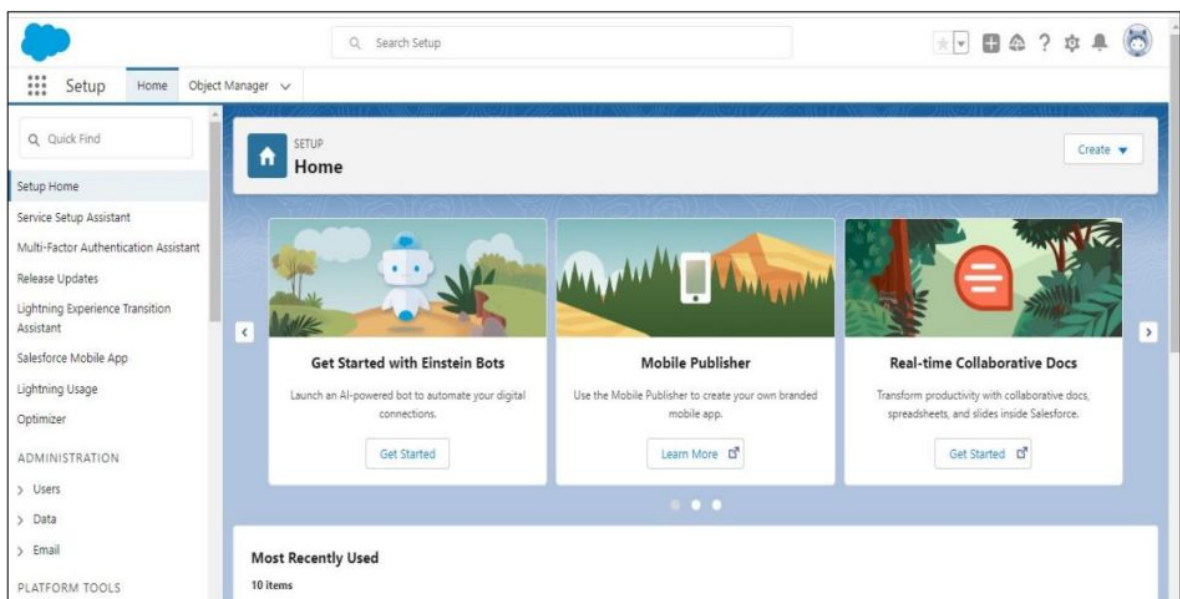
OBJECT NAME	FIELDS IN THE OBJECT	
Event	Field Label	Data Type
	City	Text Area
	Date/Time	Start Date
	Event Name	Master-Detail Relationship

Attendees	<table> <tr> <th>Field Label</th><th>Data Type</th></tr> <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> </table>	Field Label	Data Type	Id	Auto Number	Phone	Phone	Email	Email	Tickets	Picklist
Field Label	Data Type										
Id	Auto Number										
Phone	Phone										
Email	Email										
Tickets	Picklist										
Speakers	<table> <tr> <th>Field Label</th><th>Data Type</th></tr> <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> </table>	Field Label	Data Type	Bio	Text Area	Email	Email	Event Name	Look-Up Relationship		
Field Label	Data Type										
Bio	Text Area										
Email	Email										
Event Name	Look-Up Relationship										
Vendors	<table> <tr> <th>Field Label</th><th>Data Type</th></tr> <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> </table>	Field Label	Data Type	Email	Email	Phone	Phone	Service Provider	Text	Event Name	Look-Up Relationship
Field Label	Data Type										
Email	Email										
Phone	Phone										
Service Provider	Text										
Event Name	Look-Up Relationship										

3.2 Activity & Screenshot

1. Salesforce

Home page



2. Objects

Events

The screenshot shows the Salesforce Setup interface for the 'Event' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Event' and contains a 'Details' section. The 'Details' section has a left-hand menu with options: 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', and 'Related Lookup Filters'. The 'Details' section itself contains the following fields:

Field Name	Value
Description	
API Name	Event__c
Custom	✓
Singular Label	Event
Plural Label	Events
Enable Reports	✓
Track Activities	✓
Track Field History	
Deployment Status	In Development
Help Settings	Standard salesforce.com Help Window

Buttons for 'Edit' and 'Delete' are located in the top right corner of the 'Details' section.

Attendees

The screenshot shows the Salesforce Setup interface for the 'Attendee' object. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The left sidebar shows the 'Setup' menu with 'Object Manager' selected. The main content area is titled 'Attendee' and contains a 'Details' section. The 'Details' section has a left-hand menu with options: 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', and 'Related Lookup Filters'. The 'Details' section itself contains the following fields:

Field Name	Value
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

Buttons for 'Edit' and 'Delete' are located in the top right corner of the 'Details' section.

Speakers

The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various configuration options under 'Details', with 'Lightning Record Pages' currently selected. The main content area displays the 'Details' for the 'Speaker' object, including its API Name, Custom status, Singular Label, Plural Label, and various settings like 'Enable Reports' and 'Track Activities'.

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

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

<https://rdgacollge5-dev-ed.develop.lightning.force.com/lightning/setup/.../view>

Vendors

The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various configuration options under 'Details', with 'Lightning Record Pages' currently selected. The main content area displays the 'Details' for the 'Vendor' object, including its API Name, Custom status, Singular Label, Plural Label, and various settings like 'Enable Reports' and 'Track Activities'.

Setup > OBJECT MANAGER
Vendor

Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Details [Edit] [Delete]

Description

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

<https://rdgacollge5-dev-ed.develop.lightning.force.com/one/one.app#/setup/Ob...>

3. Tab

Custom Tabs

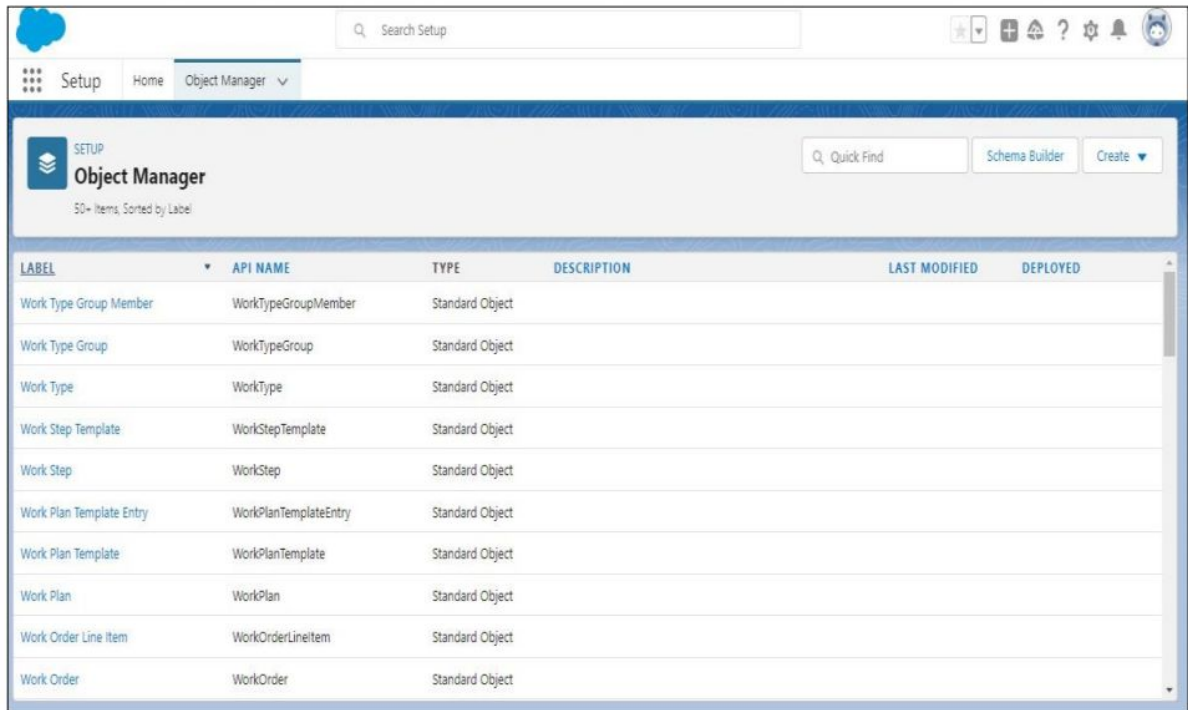
The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "tabs" entered, and the "User Interface" section is expanded, showing "Rename Tabs and Labels" and "Tabs". The main content area is titled "Custom Tabs" and includes a "Help for this Page" link. Below the title, there is a paragraph explaining that custom tabs can be created to extend Salesforce functionality. A section titled "Custom Object Tabs" contains a table with columns for Action, Label, Tab Style, and Description. The table lists four tabs: Attendees (Bank style), Events (Airplane style), Speakers (Books style), and Vendors (Building style). Each row has "Edit" and "Del" links. Below this table is a section for "Web Tabs" which currently shows "No Web Tabs have been defined".

Action	Label	Tab Style	Description
Edit Del	Attendees	Bank	
Edit Del	Events	Airplane	
Edit Del	Speakers	Books	
Edit Del	Vendors	Building	

Application

The screenshot shows the Salesforce Event Management application. The top navigation bar includes "Event Management" and a dropdown menu with "Events", "Attendees", "Speakers", "Vendors", "Reports", and "Dashboards". The main content area is titled "Events" and has a "Recently Viewed" filter. Below the filter, there is a search bar and a table header "Event Name". The table is currently empty, and a message at the bottom states: "You haven't viewed any Events recently. Try switching list views."

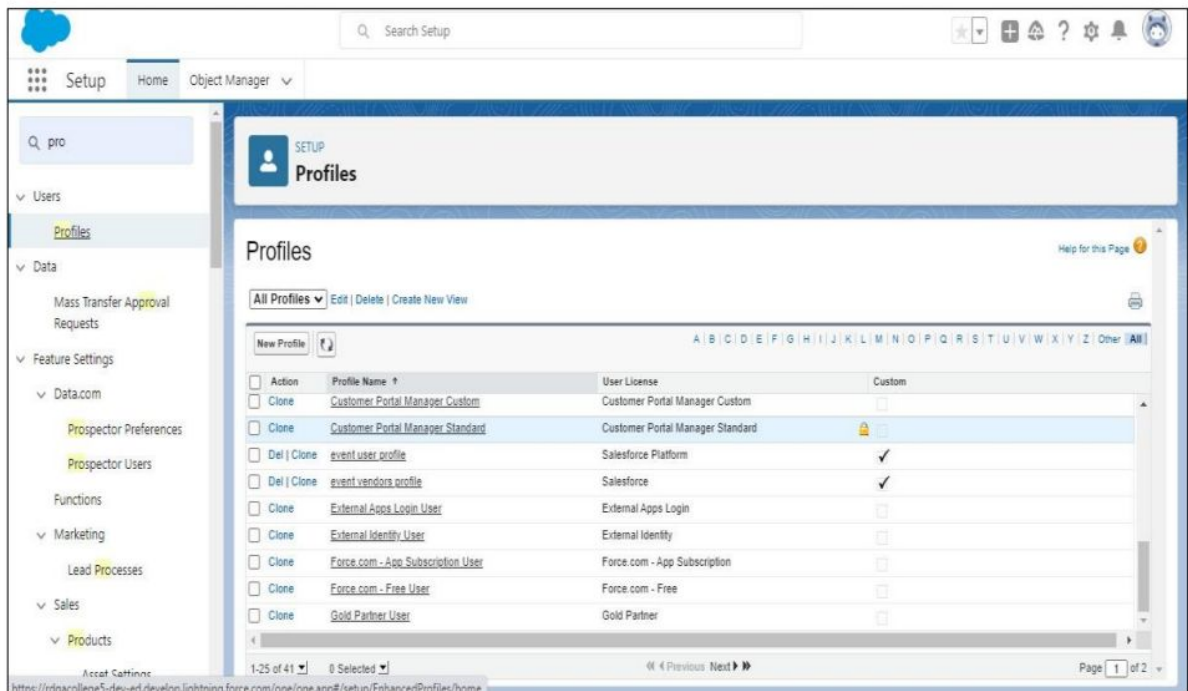
4. Fields



The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The page title is 'Object Manager' with a subtitle '50+ Items, Sorted by Label'. A search bar labeled 'Quick Find' and buttons for 'Schema Builder' and 'Create' are visible. The main content is a table listing various standard objects.

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			

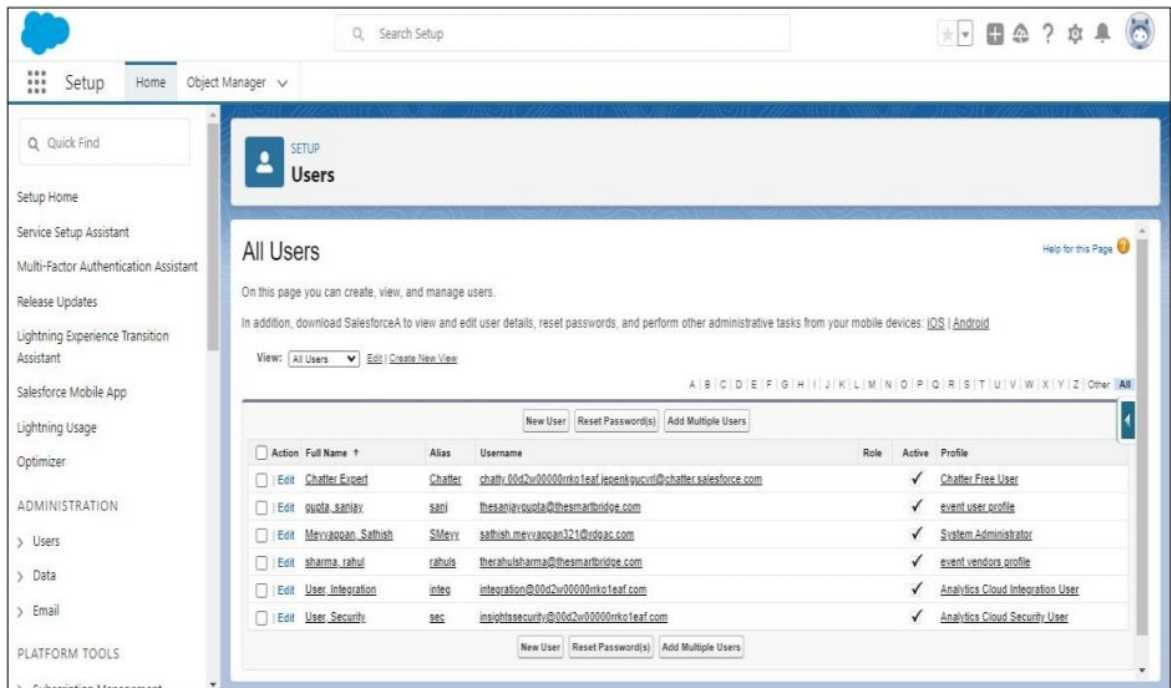
5. Profile



The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The page title is 'Profiles' with a subtitle 'Help for this Page'. A search bar and buttons for 'All Profiles', 'Edit', 'Delete', and 'Create New View' are visible. The main content is a table listing various user profiles.

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

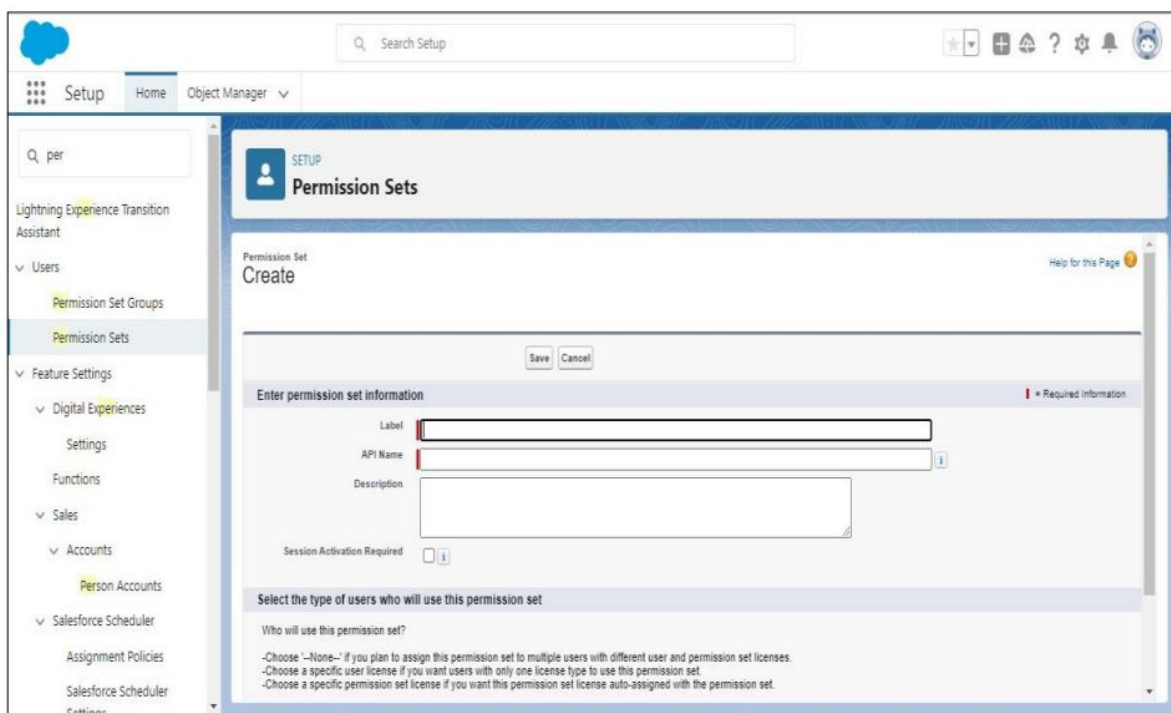
6. User



The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar contains navigation links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS. The main content area is titled 'All Users' and includes instructions on how to manage users. Below the instructions, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A table lists existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table contains six rows of user data.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatter_00d2v00000r0ko1eaf@salesforce.com		✓	Chatter Free User
Edit	quola_santley	santl	thesantleyquola@thesmartbridge.com		✓	event user profile
Edit	Mervaoan_Sathish	SMErv	sathish.mervaoan321@rdpac.com		✓	System Administrator
Edit	sharma_rahul	rahuls	therahulsharma@thesmartbridge.com		✓	event vendors profile
Edit	User_Integration	integ	integration@00d2v00000r0ko1eaf.com		✓	Analytics Cloud Integration User
Edit	User_Security	sec	insightssecurity@00d2v00000r0ko1eaf.com		✓	Analytics Cloud Security User

7. Permission sets



The screenshot shows the Salesforce Setup interface with the 'Permission Sets' page selected. The left sidebar contains navigation links for Lightning Experience Transition Assistant, Users, Permission Set Groups, Permission Sets, Feature Settings (Digital Experiences, Settings, Functions), Sales, Accounts (Person Accounts), Salesforce Scheduler, Assignment Policies, and Salesforce Scheduler Settings. The main content area is titled 'Permission Sets' and includes a 'Create' button. Below the 'Create' button, there is a form to 'Enter permission set information' with fields for Label, API Name, and Description. There is also a checkbox for 'Session Activation Required'. Below the form, there is a section titled 'Select the type of users who will use this permission set' with instructions on how to choose the appropriate user type.

Enter permission set information

Label:

API Name:

Description:

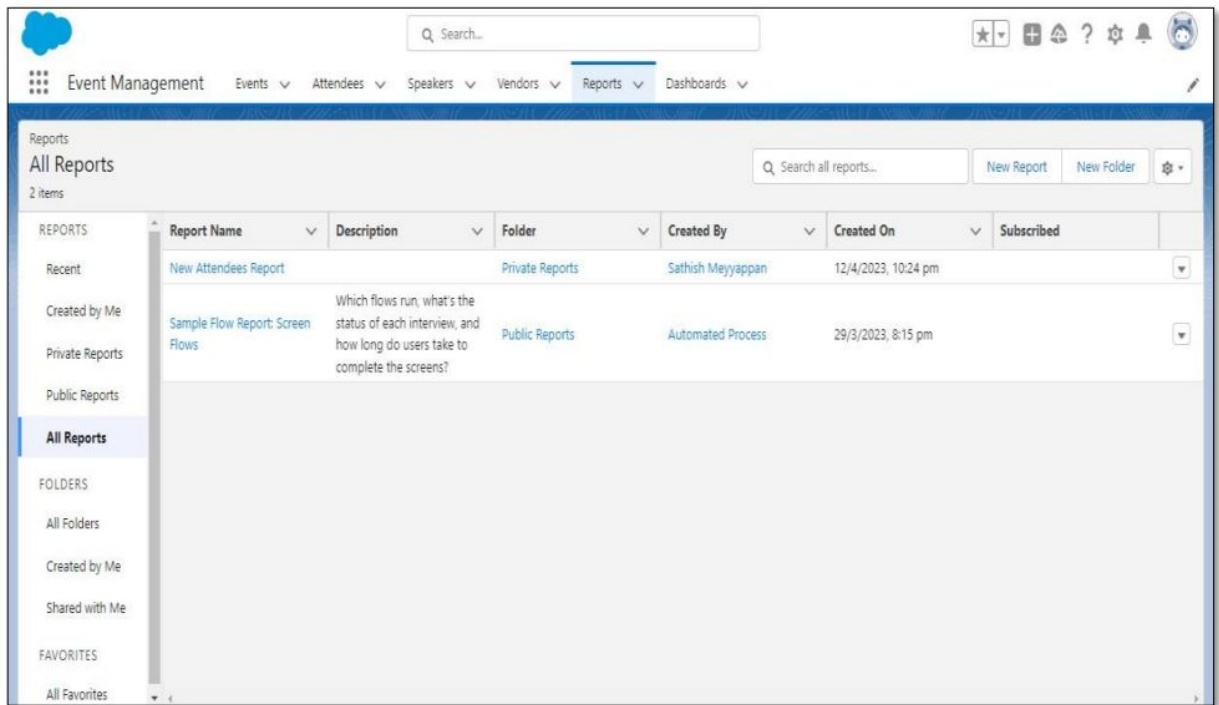
Session Activation Required: ☐

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



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.

