

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.

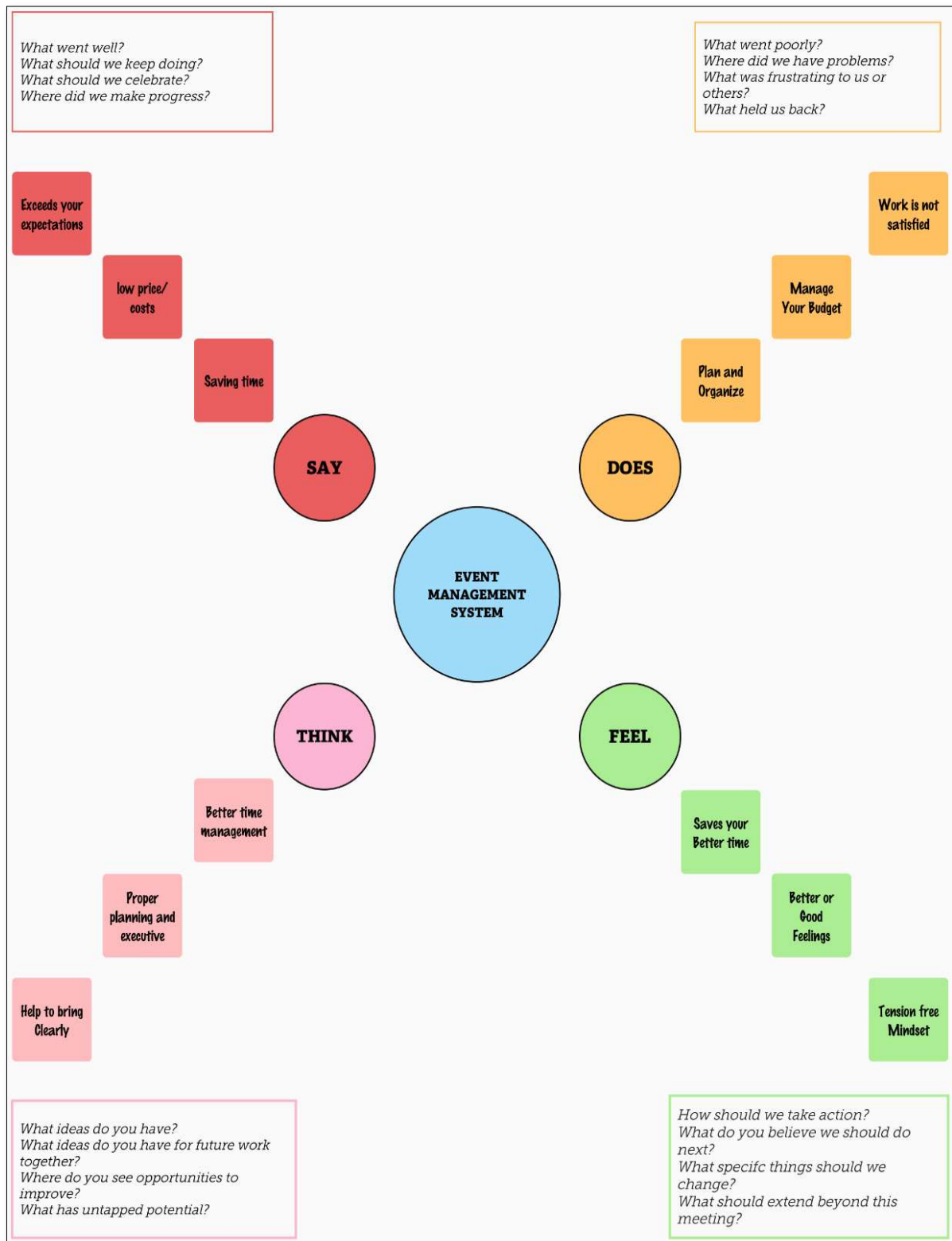
Communication — communications serve as the foundation of your entire event. Every event organizer's worst nightmare is running an event where no one shows up. Every event organizer's second-worst nightmare is running an event where a group of people get the wrong message and forget to show up / show 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.

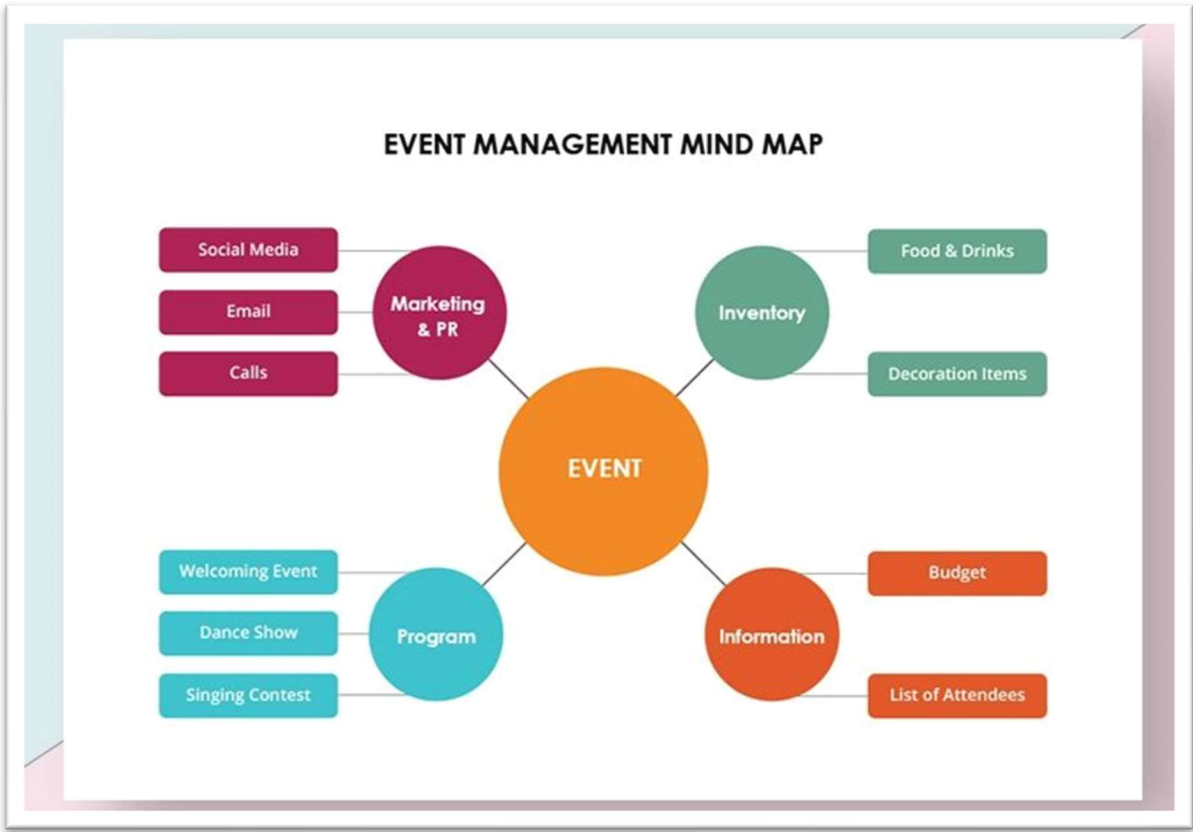
Personalization — Every business is unique. You probably want to see your events info in the context of your leads, contacts, opportunities, etc. which means you'll need to integrate any event management apps you use with your database. In doing so you might run into compatibility issues, certain apps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

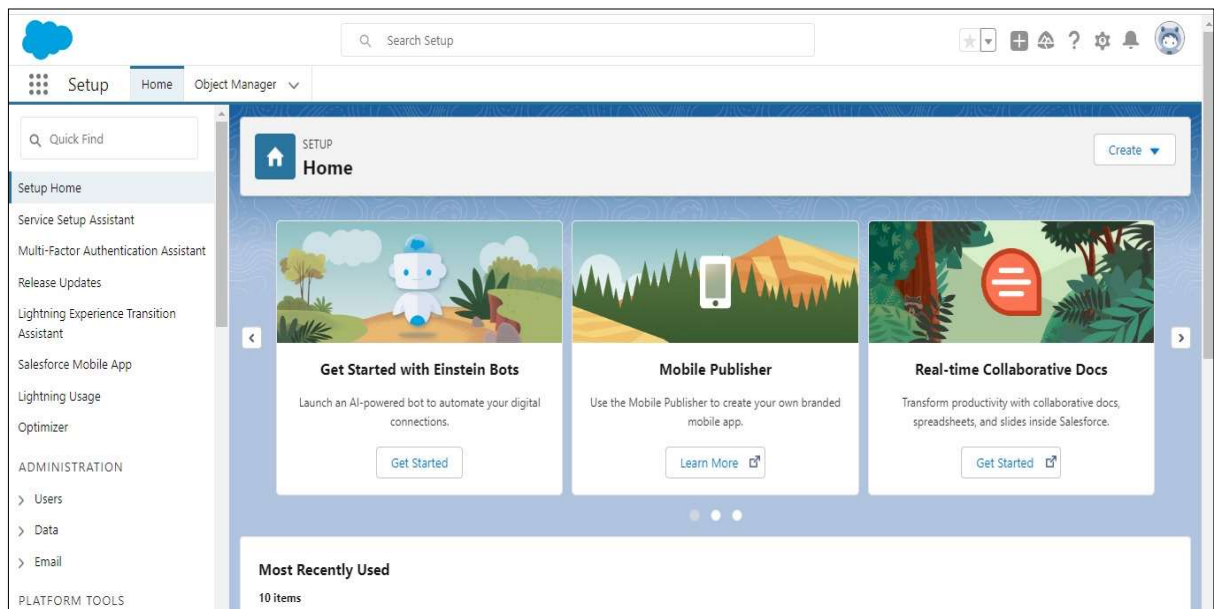
| OBJECT NAME | FIELDS IN THE OBJECT | |
|-------------|----------------------|----------------------------|
| Event | Field Label | Data Type |
| | City | Text Area |
| | Date/Time | Start Date |
| | Event Name | Master-Detail Relationship |
| | | |

| 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 | | | | | | | | | | |

3.1 Activity & Screenshot

1. Salesforce

Home page



2. Objects

Events

The screenshot shows the Salesforce Setup interface for the 'Event' object. 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, and Related Lookup Filters. The main content area is titled 'Event' and includes a 'Details' section with the following fields:

| Field | 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 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, and Related Lookup Filters. The main content area is titled 'Attendee' and includes a 'Details' section with the following fields:

| Field | 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



Search Setup

SetupHomeObject 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

Details

EditDelete

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

rdgacollege5-dev-ed.develop.lightning.force.com/lightning/setup/.../view

Vendors



Search Setup

SetupHomeObject Manager

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

EditDelete

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://rdgacollege5-dev-ed.develop.lightning.force.com/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, showing results under "User Interface" including "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 an explanatory text: "You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app."

Custom Object Tabs

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

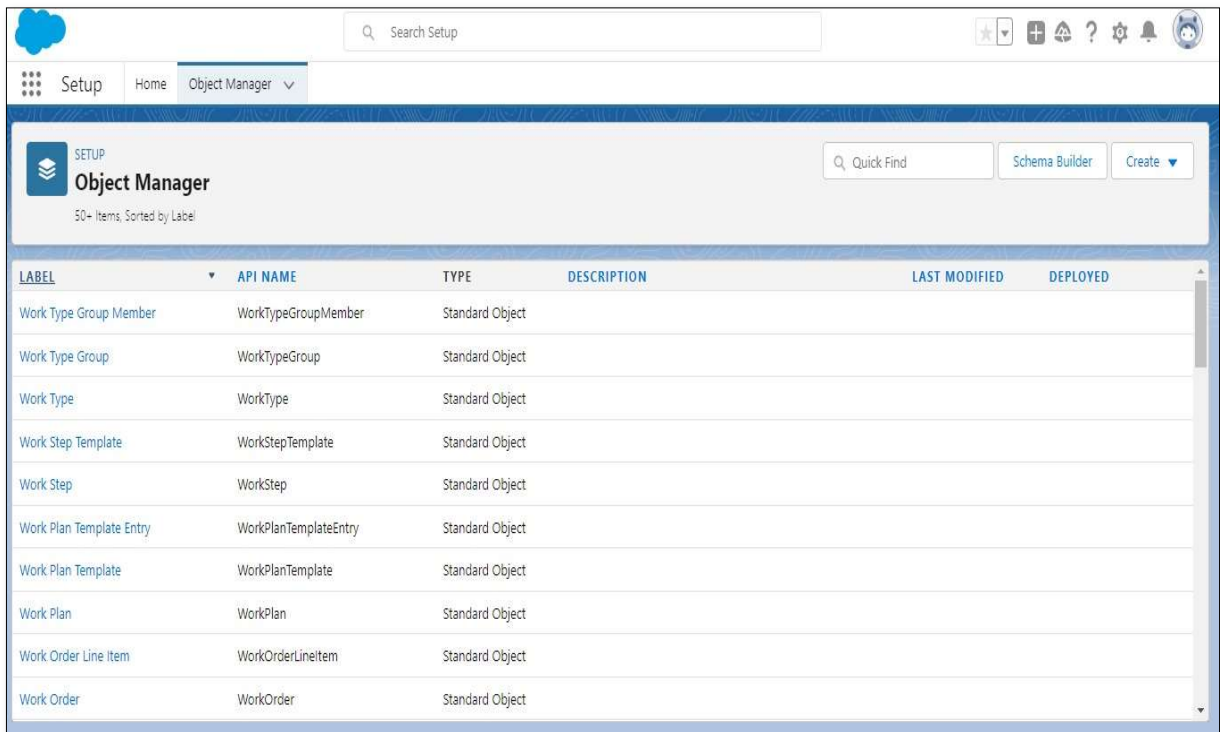
Web Tabs

No Web Tabs have been defined

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 includes a "Recently Viewed" section. Below this, there is a search bar and a table with the following columns: "Event Name". The table is currently empty, and a message states: "You haven't viewed any Events recently. Try switching list views."

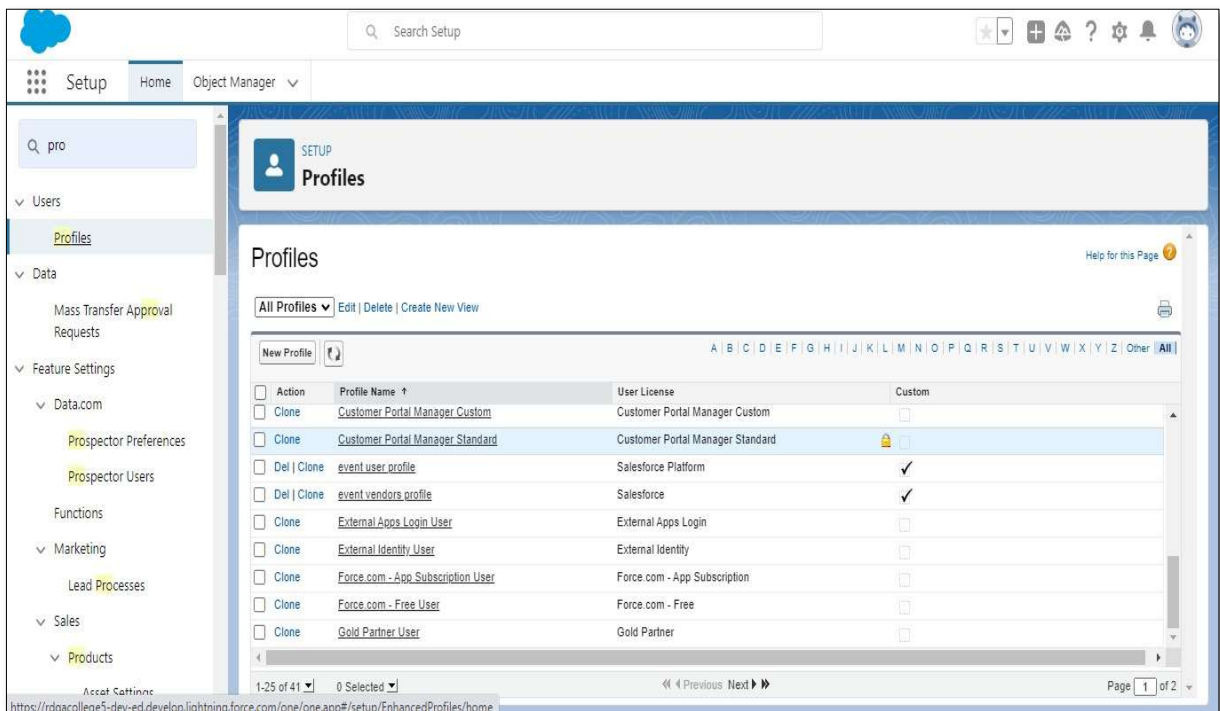
4. Fields



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header area displays 'Object Manager' with a search bar and 'Schema Builder' and 'Create' buttons. Below the header, a table lists various standard objects. The table has columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The objects listed are: Work Type Group Member, Work Type Group, Work Type, Work Step Template, Work Step, Work Plan Template Entry, Work Plan Template, Work Plan, Work Order Line Item, and Work Order.

| 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 Profiles interface. The left sidebar contains a navigation menu with 'Users', 'Data', 'Feature Settings', 'Marketing', 'Sales', and 'Products'. The main content area is titled 'Profiles' and includes a search bar and a 'New Profile' button. Below the header, a table lists various profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The profiles listed are: Customer Portal Manager Custom, Customer Portal Manager Standard, event user profile, event vendors profile, External Apps Login User, External Identity User, Force.com - App Subscription User, Force.com - Free User, and Gold Partner User.

| 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 checked="" 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

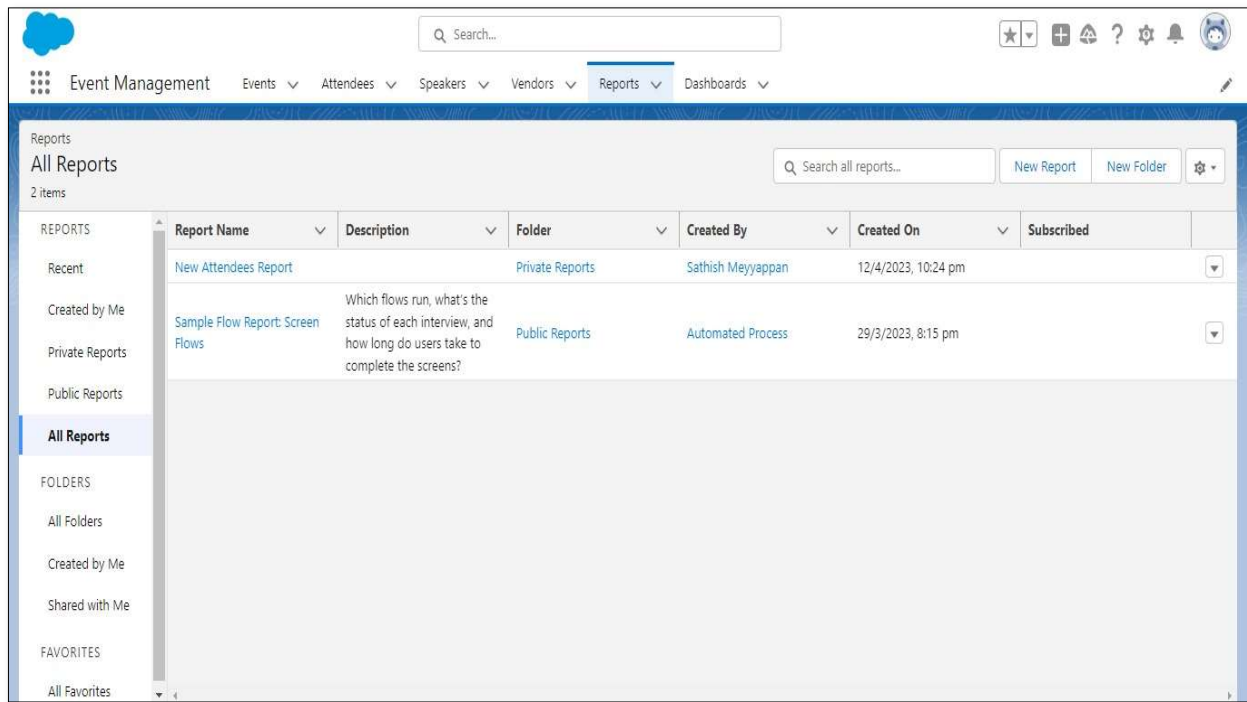
The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains navigation links: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Subscription Management). The main content area is titled 'All Users' and includes a search bar, a 'View: All Users' dropdown, and a 'Create New View' link. Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists six users: Chatter Export, gupta_sanjay, Mevvaogan, Sathish, sharma_rahul, and User Integration. Each user has an 'Edit' link and a 'New User' button. The table also includes buttons for 'Reset Password(s)' and 'Add Multiple Users'.

| Action | Full Name | Alias | Username | Role | Active | Profile |
|----------------------|--------------------|---------|---|------|--------|----------------------------------|
| Edit | Chatter Export | Chatter | chatty.00d2v00000rko1eaf@openyucvrtl@chatter.salesforce.com | | ✓ | Chatter Free User |
| Edit | gupta_sanjay | sani | thesanjaygupta@thesmartbridge.com | | ✓ | event user profile |
| Edit | Mevvaogan, Sathish | SMevv | sathish.mevvaogan321@rdgac.com | | ✓ | System Administrator |
| Edit | sharma_rahul | rahuls | therahulsharma@thesmartbridge.com | | ✓ | event vendors profile |
| Edit | User Integration | intleg | integration@00d2v00000rko1eaf.com | | ✓ | Analytics Cloud Integration User |
| Edit | User Security | sec | insightssecurity@00d2v00000rko1eaf.com | | ✓ | Analytics Cloud Security User |

7. Permission sets

The screenshot shows the Salesforce Setup interface for the 'Permission Sets' section. The left sidebar contains navigation links: Lightning Experience Transition Assistant, Users, Permission Set Groups, Permission Sets, Feature Settings (Digital Experiences, Settings, Functions), Sales, Accounts, Person Accounts, and Salesforce Scheduler (Assignment Policies, Salesforce Scheduler Settings). The main content area is titled 'Permission Sets' and includes a search bar, a 'Create' button, and a 'Help for this Page' link. Below this is a form titled 'Enter permission set information' with fields for Label, API Name, and Description. The 'Session Activation Required' checkbox is also present. The form includes 'Save' and 'Cancel' buttons. Below the form is a section titled 'Select the type of users who will use this permission set' with a question 'Who will use this permission set?' and three options: '-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.', and '-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/ranjanirdm>
- Team member 2** - <https://trailblazer.me/id/anbarasanrdm>
- Team member 3** - <https://trailblazer.me/id/bharathirdm>
- Team member 4** - <https://trailblazer.me/id/vallarasurdm>

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.