

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.

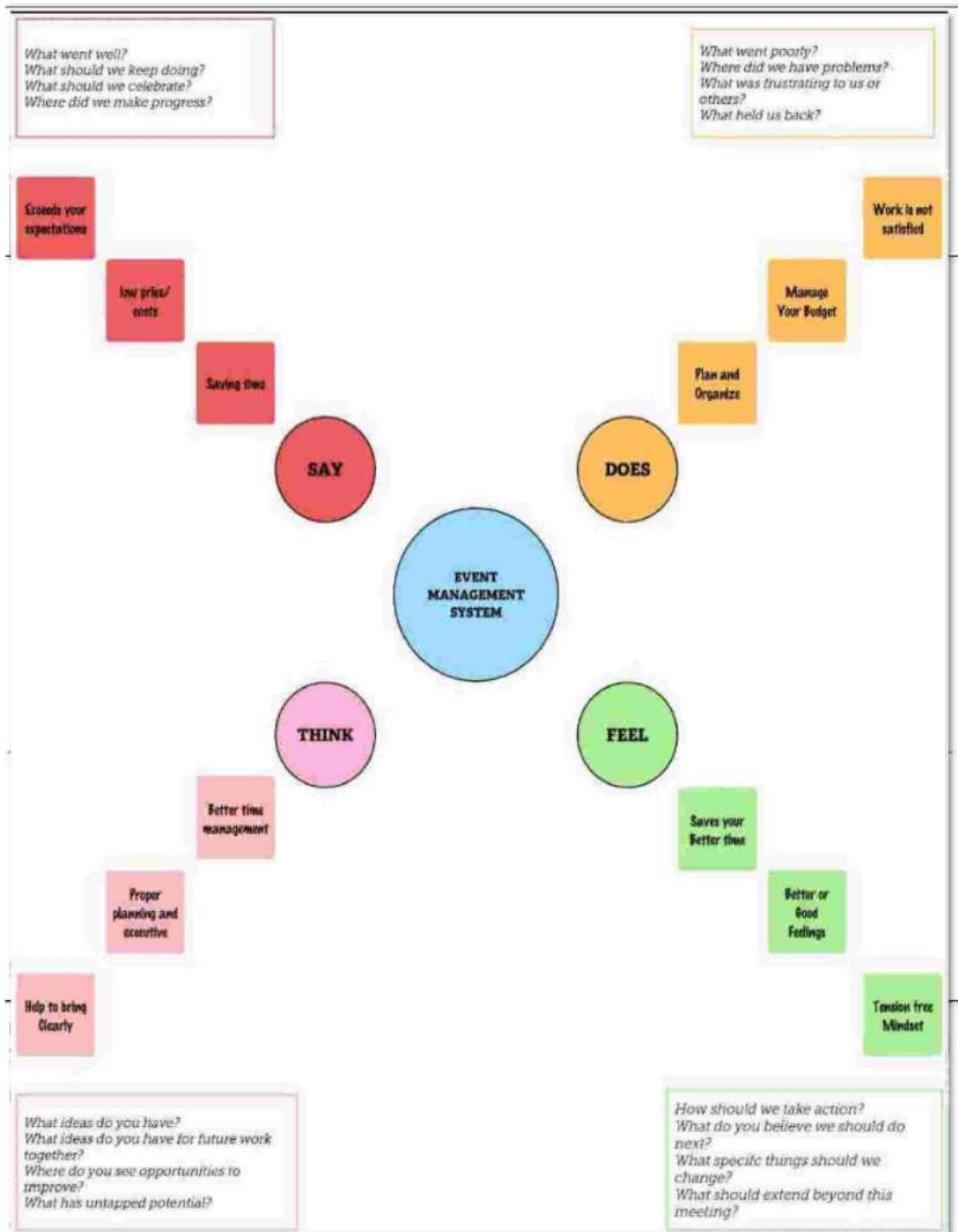
Communication — communications serve as the foundation of your entire event. Every event organizer's worst nightmare is running an event where no one shows up. Every event organizer's second-worst nightmare is running an event where a group of people get the wrong message and forget to show up / show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

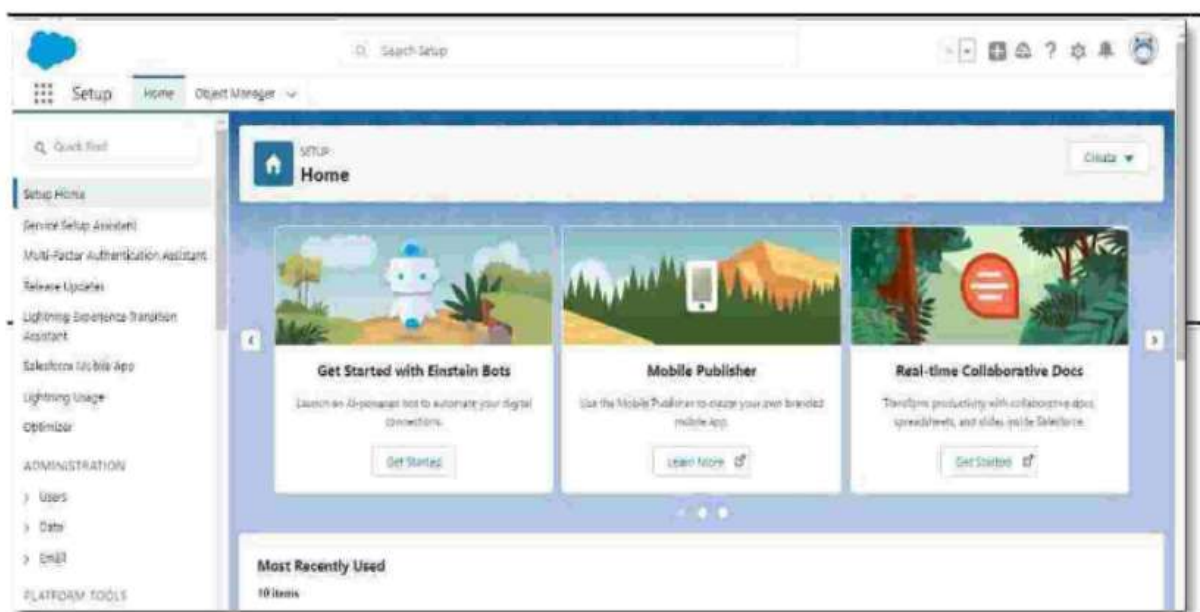
OBJECT NAME	FIELDS IN THE OBJECT	
Event	Field Label	Data Type
	City	Text Area
	Date/Time	Start Date
	Event Name	Master-Detail Relationship

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
Field Label	Data Type										
Id	Auto Number										
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Tickets	Picklist										
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		
Field Label	Data Type										
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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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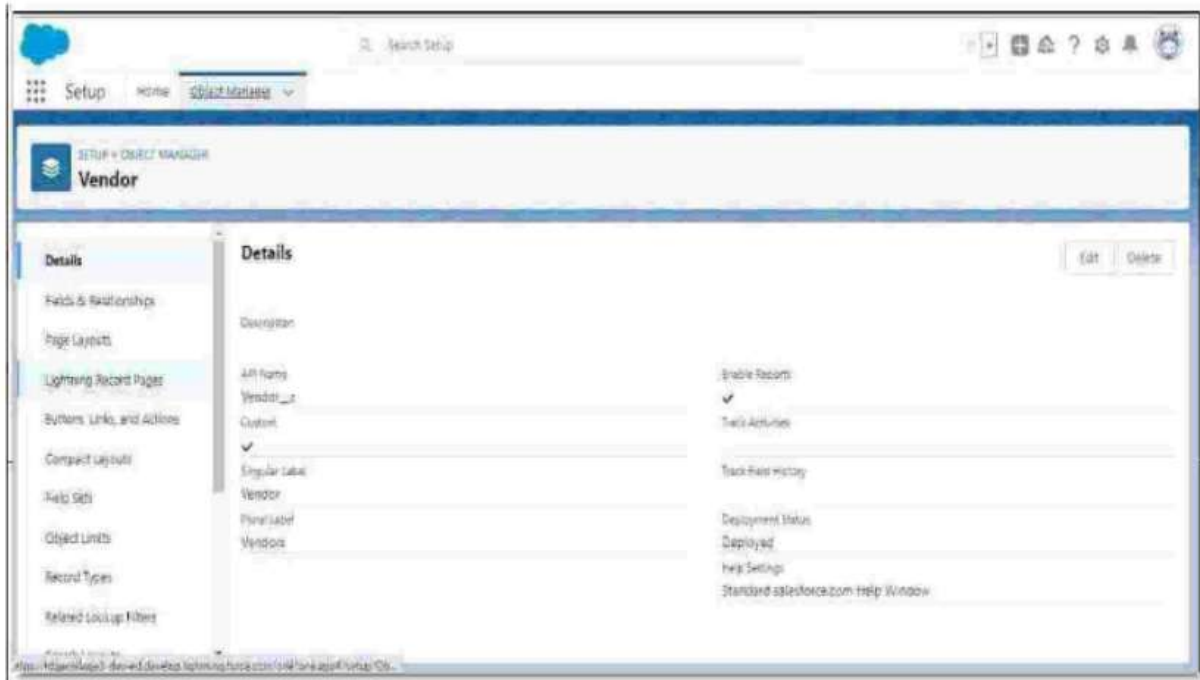
3.1 Activity & Screenshot

1. Salesforce

Home page

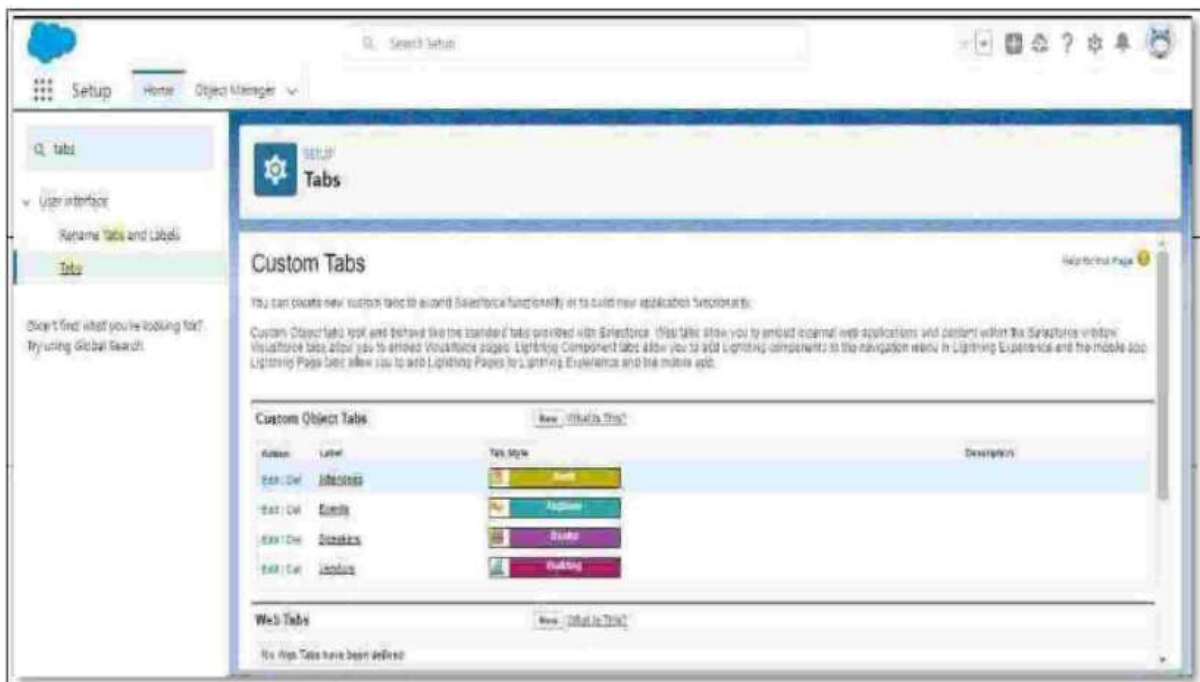


2. Objects

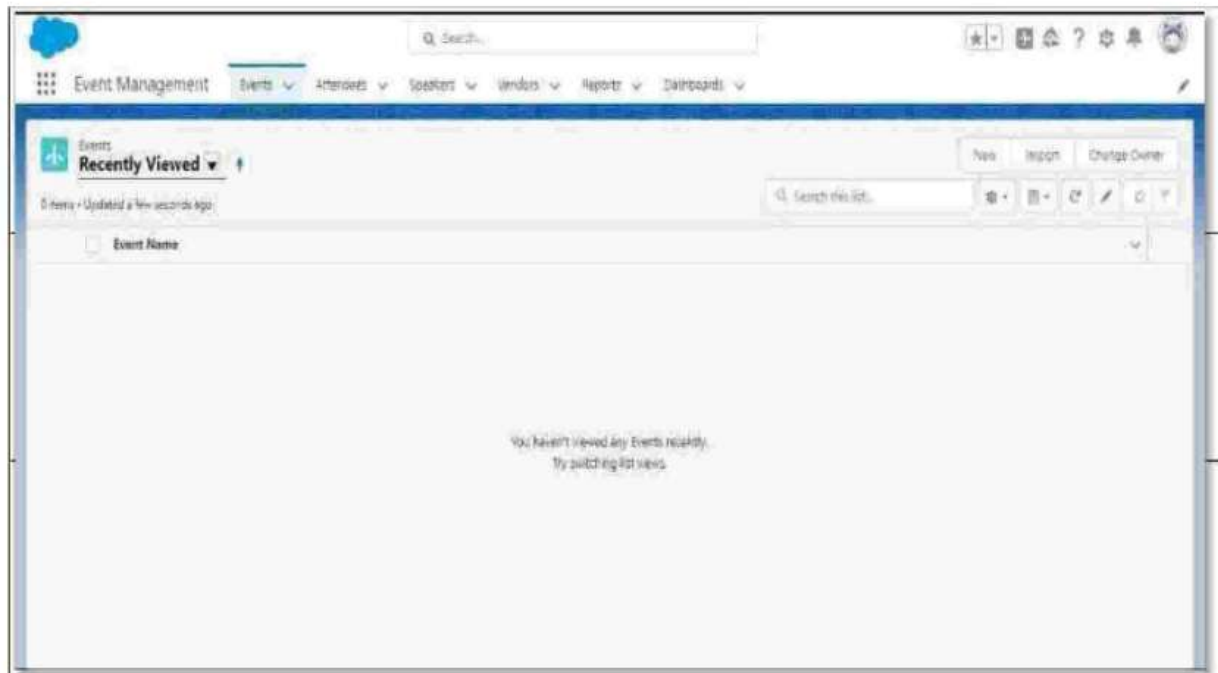


3. Tab

Custom Tabs



Application

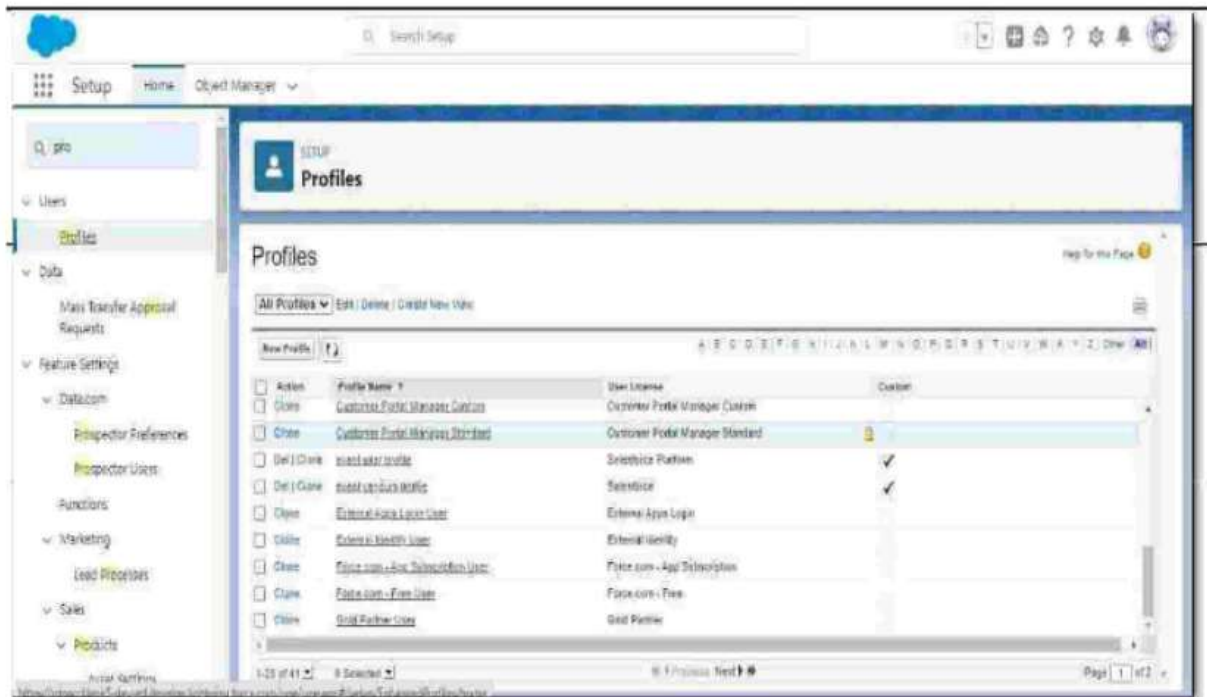


4. Fields

The screenshot shows the 'Object Manager' application 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 displays a table of objects. The table has columns: 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The table lists various objects, including '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



Setup Home Object Manager

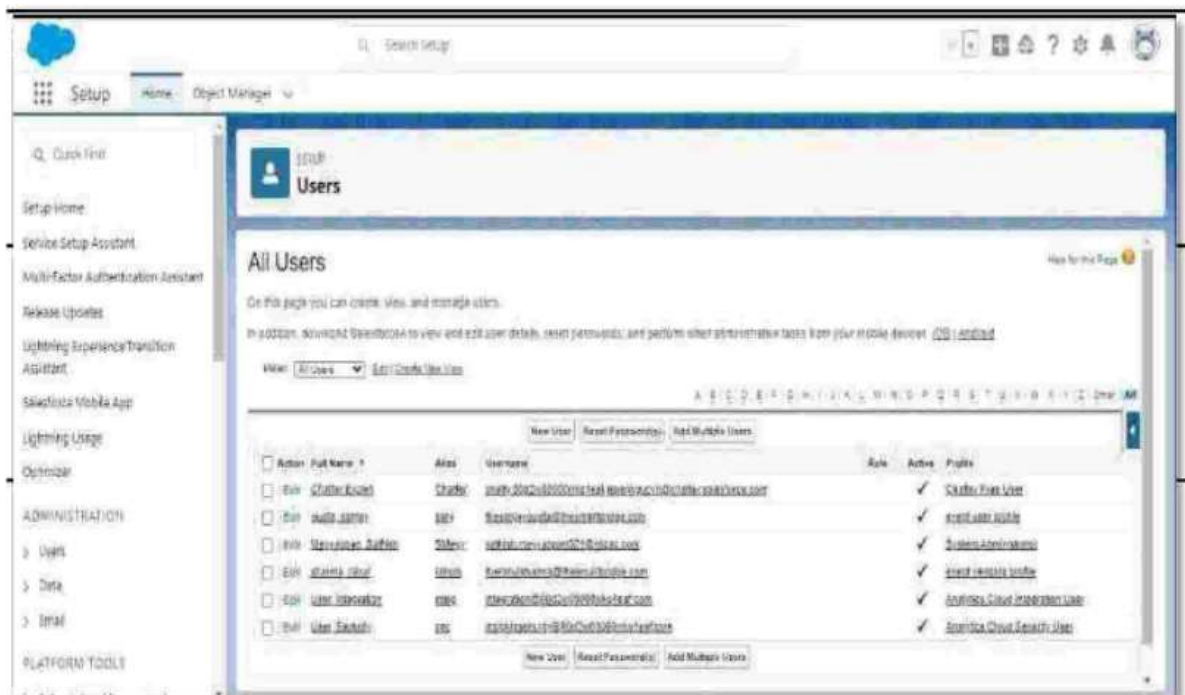
Profiles

All Profiles | Edit | Delete | Create New User

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"/>	Standard Profile	Standard Profile	<input checked="" type="checkbox"/>
<input type="checkbox"/>	External App User	External App User	<input checked="" type="checkbox"/>
<input type="checkbox"/>	External User	External User	
<input type="checkbox"/>	Force.com - App Developer	Force.com - App Developer	
<input type="checkbox"/>	Force.com - Free User	Force.com - Free User	
<input type="checkbox"/>	Guest Profile	Guest Profile	

1-23 of 41 | 0 Selected | 0 Processes Used | Page 1 of 2

6. User



Setup Home Object Manager

Users

All Users | Edit | Create New User

On this page you can create, view, and manage users.

In addition, download SSO metadata to view and edit user details, user passwords, and perform other administrative tasks from your mobile device. [Go to mobile](#)

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Admin	Chatter	chatter.admin@salesforce.com		<input checked="" type="checkbox"/>	Standard Profile
<input type="checkbox"/>	Chatter Admin	Chatter	chatter.admin@salesforce.com		<input checked="" type="checkbox"/>	Standard Profile
<input type="checkbox"/>	Marketing Admin	Marketing	marketing.admin@salesforce.com		<input checked="" type="checkbox"/>	Marketing Admin Profile
<input type="checkbox"/>	Marketing Admin	Marketing	marketing.admin@salesforce.com		<input checked="" type="checkbox"/>	Marketing Admin Profile
<input type="checkbox"/>	User Admin	User	user.admin@salesforce.com		<input checked="" type="checkbox"/>	Standard Profile
<input type="checkbox"/>	User Admin	User	user.admin@salesforce.com		<input checked="" type="checkbox"/>	Standard Profile
<input type="checkbox"/>	User Admin	User	user.admin@salesforce.com		<input checked="" type="checkbox"/>	Standard Profile

New User | Reset Passwords | Add Multiple Users

7. Permission sets

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with options like Setup, Home, and Object Manager. The main content area is titled 'Permission Sets' and features a 'Create' button. Below this, there is a section for 'Enter permission set information' with fields for Label, API Name, and Description. A 'Save' button is visible. Below the information section, there is a section for 'Select the type of users who will use this permission set' with a dropdown menu and a 'Save' button. The interface is clean and professional, with a blue header and a white background.

8. Reports

The screenshot shows the Salesforce Reports page. The left sidebar contains a navigation menu with options like Reports, Folders, and Favorites. The main content area is titled 'All Reports' and features a table of reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The first report is 'New Attendee Report' and the second is 'Sample Flow Report: Screen Flows'.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Attendee Report		Private Reports	Sathish Moleyyappan	12/14/2023, 10:24 pm	
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	29/12/2023, 8:15 pm	

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.