

# 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.

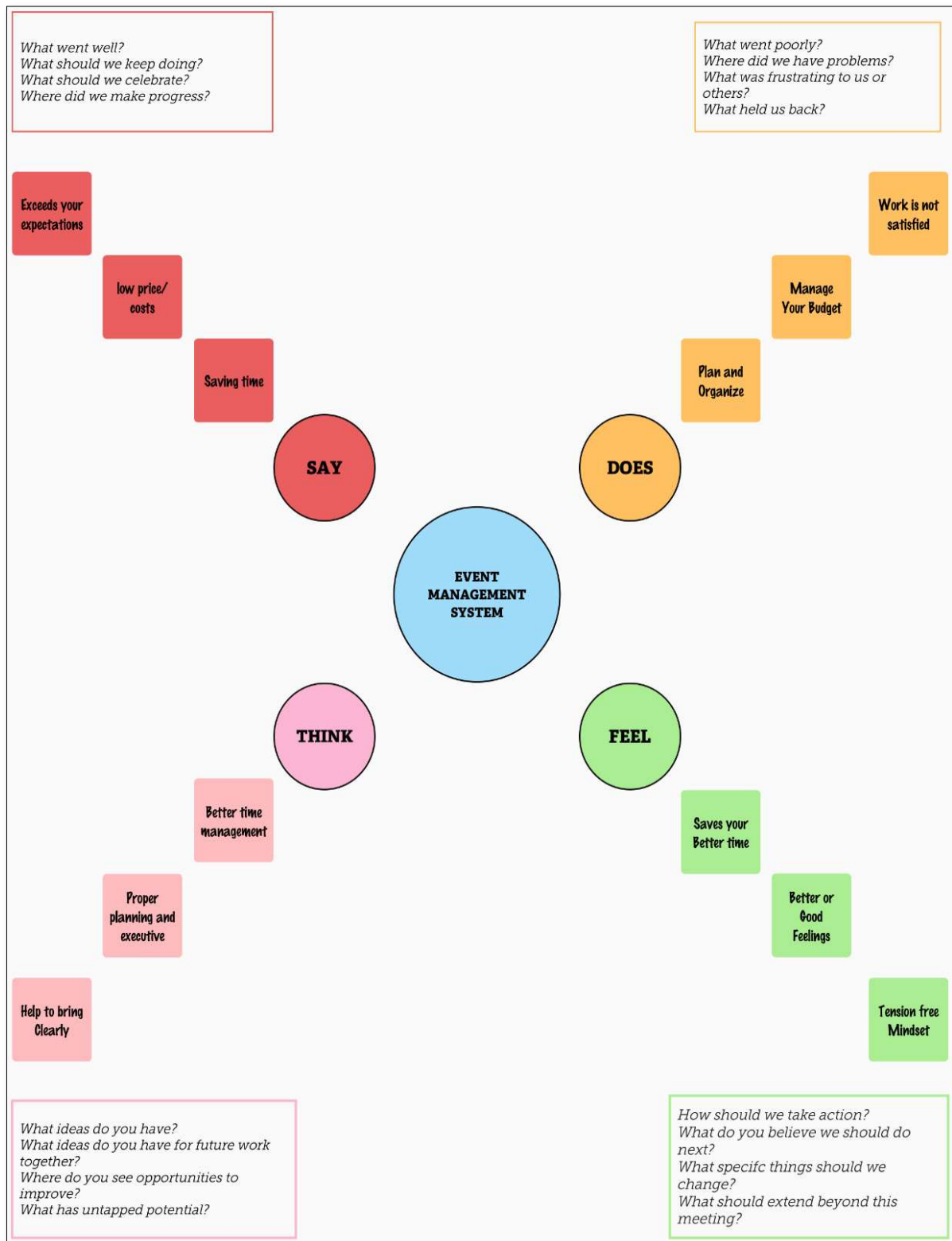
**Communication** — communications serve as the foundation of your entire event. Every event organizer's worst nightmare is running an event where no one shows up. Every event organizer's second-worst nightmare is running an event where a group of people get the wrong message and forget to show up /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

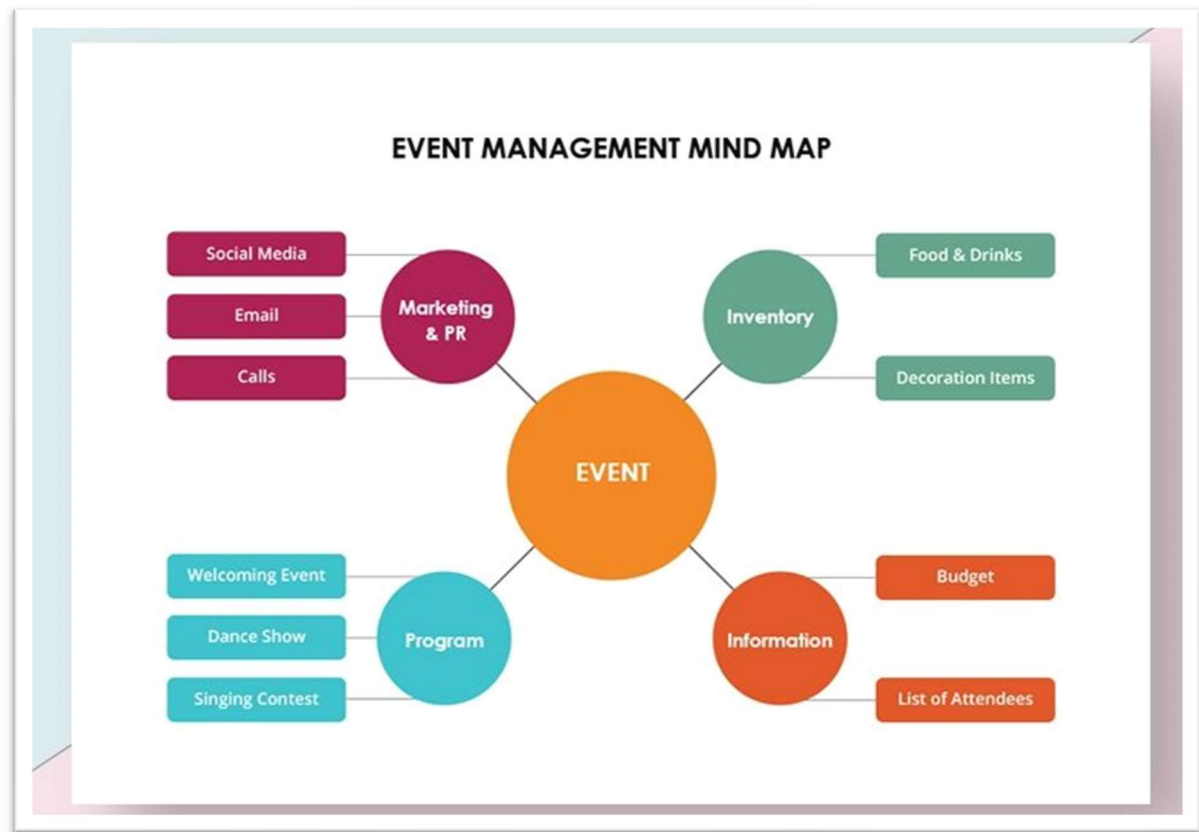
**Personalization** — Every business is unique. You probably want to see your events info in the context of your leads, contacts, opportunities, etc. which means you'll need to integrate any event management apps you use with your database. In doing so you might run into compatibility issues, certain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

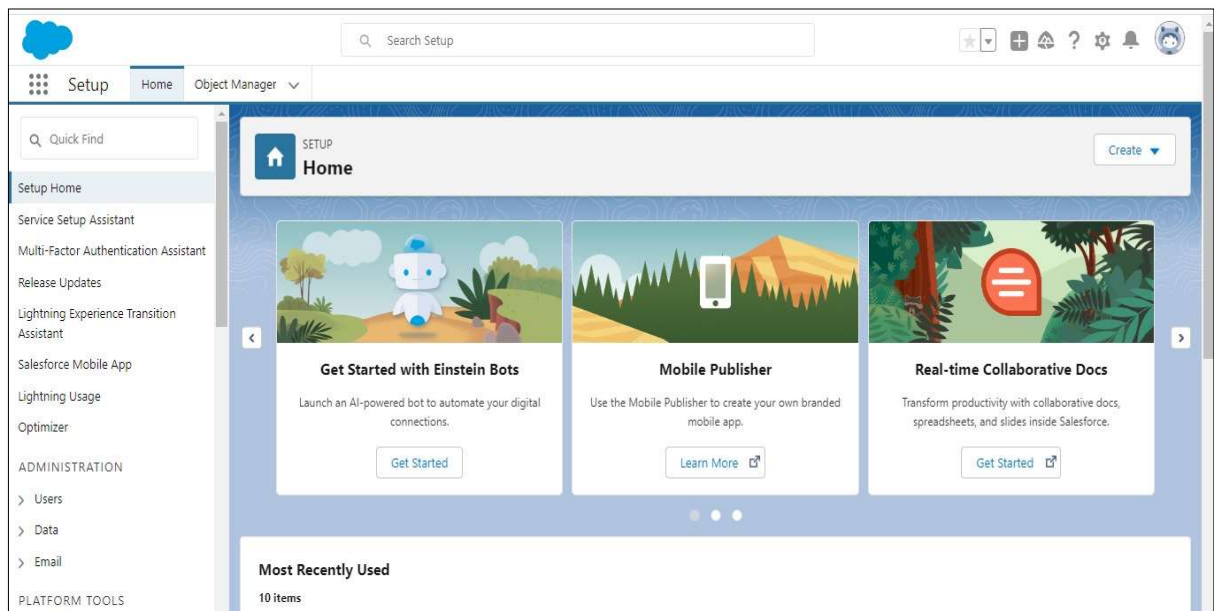
OBJECT NAME	FIELDS IN THE OBJECT	
Event	Field Label	Data Type
	City	Text Area
	Date/Time	Start Date
	Event Name	Master-Detail Relationship

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the "Setup" menu is open, showing "Home" and "Object Manager". The "Object Manager" dropdown is selected, and the "Vendor" object is highlighted. The main content area displays the "Details" for the "Vendor" object. On the left, a sidebar lists various configuration 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 on the right includes fields for Description, API Name (Vendor\_\_c), Custom (checked), Singular Label (Vendor), Plural Label (Vendors), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), Help Settings (Standard salesforce.com Help Window), and Edit/Delete buttons.

Setup > OBJECT MANAGER  
**Vendor**

**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://rdgacollege5-dev-ed.develop.lightning.force.com/one/one.app#/setup/Ob...

## 3. Tab

### Custom Tabs

The screenshot shows the Salesforce Setup interface for Custom Tabs. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the "Setup" menu is open, showing "Home" and "Object Manager". The "Object Manager" dropdown is selected, and the "Tabs" object is highlighted. The main content area displays the "Custom Tabs" page. On the left, a sidebar lists various configuration options: User Interface, Rename Tabs and Labels, and Tabs. The "Tabs" section on the right includes a "Custom Tabs" header, a "Help for this Page" link, and a table of custom tabs. The table has columns for Action, Label, Tab Style, and Description. The table lists four tabs: Attendees (Bank), Events (Airplane), Speakers (Books), and Vendors (Building). Below the table, there is a section for "Web Tabs" which states "No Web Tabs have been defined".

Setup > TABS  
**Tabs**

**Custom Tabs** Help for this Page

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.

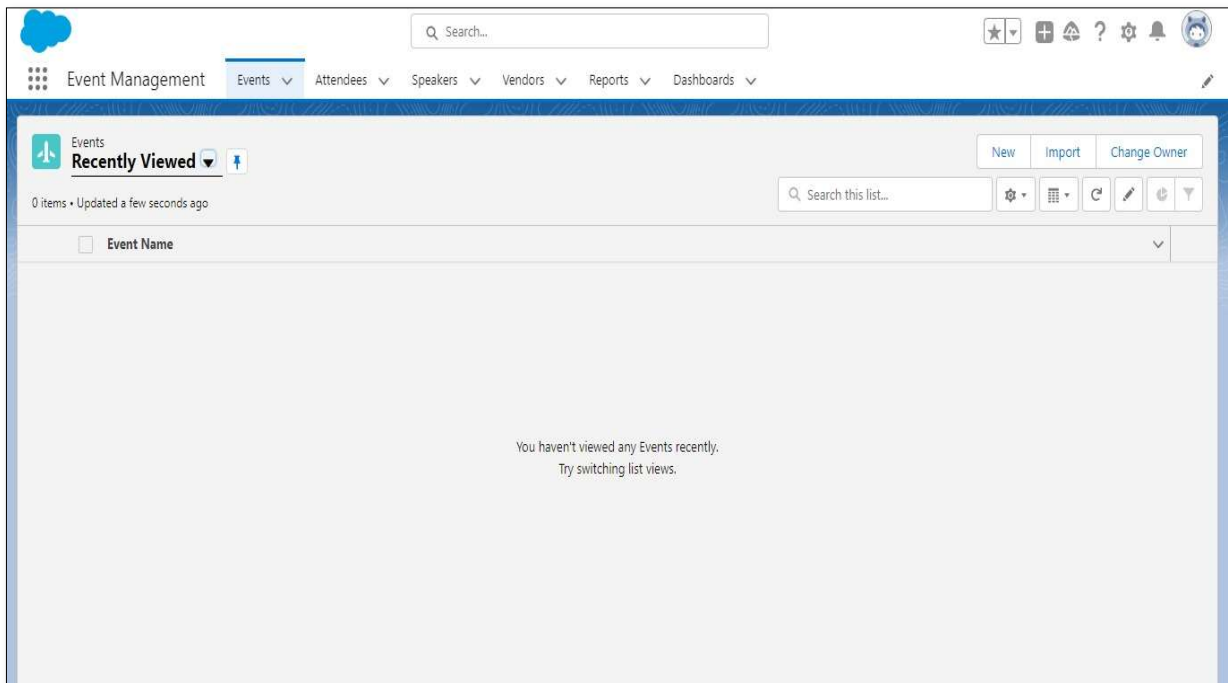
**Custom Object Tabs** New What Is This?

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

**Web Tabs** New What Is This?

No Web Tabs have been defined

# Application

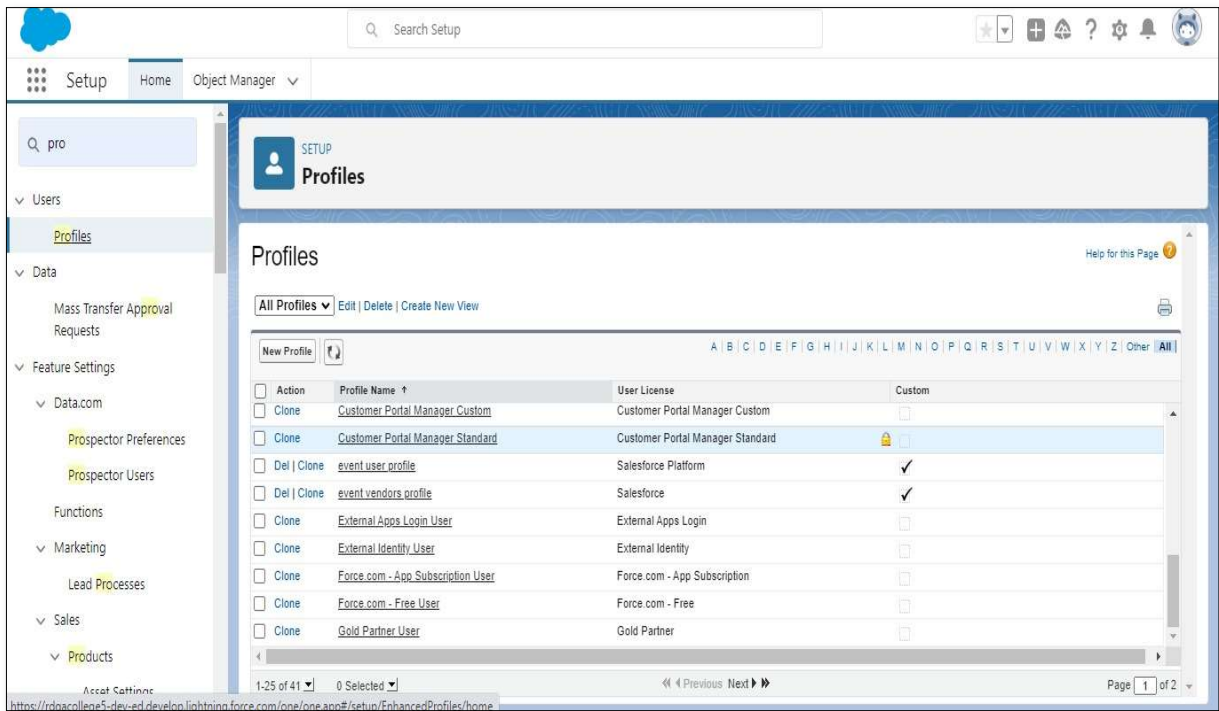


## 4. Fields

The screenshot shows the 'Object Manager' application interface. The top navigation bar includes a search bar and icons for settings, help, and notifications. The main menu on the left lists 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' section is active, showing a 'Quick Find' bar and a 'Schema Builder' button. The main content area displays a table of 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			

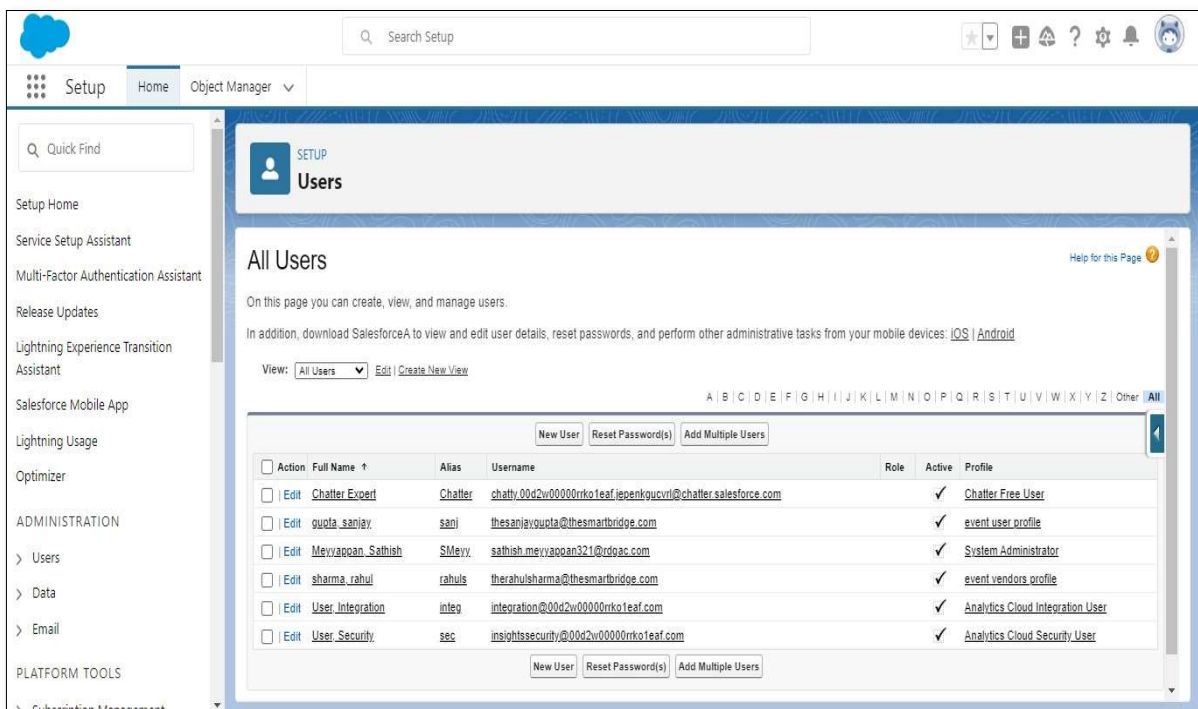
## 5. Profile



The screenshot shows the Salesforce Setup interface for the 'Profiles' page. The left sidebar contains a navigation menu with 'Users' and 'Profiles' highlighted. The main content area displays a table of profiles with columns for Action, Profile Name, User License, and Custom. The table lists several profiles, including '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'. The 'event user profile' and 'event vendors profile' are marked as 'Standard' and 'Salesforce Platform' respectively. The 'Force.com - App Subscription User' is marked as 'Force.com - App Subscription'. The 'Force.com - Free User' is marked as 'Force.com - Free'. The 'Gold Partner User' is marked as 'Gold Partner'. The table is sorted by 'Profile Name' and shows 1-25 of 41 profiles. The page number is 1 of 2.

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' page. The left sidebar contains a navigation menu with 'Users' highlighted. The main content area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Chatter Expert', 'gupta\_sanjay', 'Mevvaqan Sathish', 'sharma\_rahul', 'User Integration', and 'User Security'. The 'Chatter Expert' user is marked as 'Chatter Free User'. The 'gupta\_sanjay' user is marked as 'event user profile'. The 'Mevvaqan Sathish' user is marked as 'System Administrator'. The 'sharma\_rahul' user is marked as 'event vendors profile'. The 'User Integration' user is marked as 'Analytics Cloud Integration User'. The 'User Security' user is marked as 'Analytics Cloud Security User'. The table is sorted by 'Full Name' and shows 1-25 of 41 users. The page number is 1 of 2.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2v00000rko1eaf@jeepnigucvri@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	gupta_sanjay	sanj	thesanjaygupta@thesmartbridge.com		<input checked="" type="checkbox"/>	event user profile
<input type="checkbox"/> Edit	Mevvaqan Sathish	SMevv	sathish.mevvaqan321@rdpac.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	sharma_rahul	rahuls	therahulsharma@thesmartbridge.com		<input checked="" type="checkbox"/>	event vendors profile
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2v00000rko1eaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d2v00000rko1eaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## 7. Permission sets

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories like Users, Feature Settings, and Sales. The main content area is titled 'Permission Sets' and shows a 'Create' form. The form has two main sections: 'Enter permission set information' and 'Select the type of users who will use this permission set'. The first section includes fields for Label, API Name, and Description, with a 'Session Activation Required' checkbox. The second section provides instructions on how to choose the user type.

Setup

Search Setup

per

Lightning Experience Transition Assistant

Users

Permission Set Groups

Permission Sets

Feature Settings

Digital Experiences

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler Settings

SETUP

Permission Sets

Permission Set 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 categories like Reports, Folders, and Favorites. The main content area is titled 'Reports' and shows a list of reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The first report is 'New Attendees Report' and the second is 'Sample Flow Report: Screen Flows'.

Event Management

Events Attendees Speakers Vendors Reports Dashboards

Reports

All Reports

Search all reports...

New Report New Folder

2 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Attendees Report		Private Reports	Sathish Meyyappan	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	
Private Reports						
Public Reports						
All Reports						
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.