

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.

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.

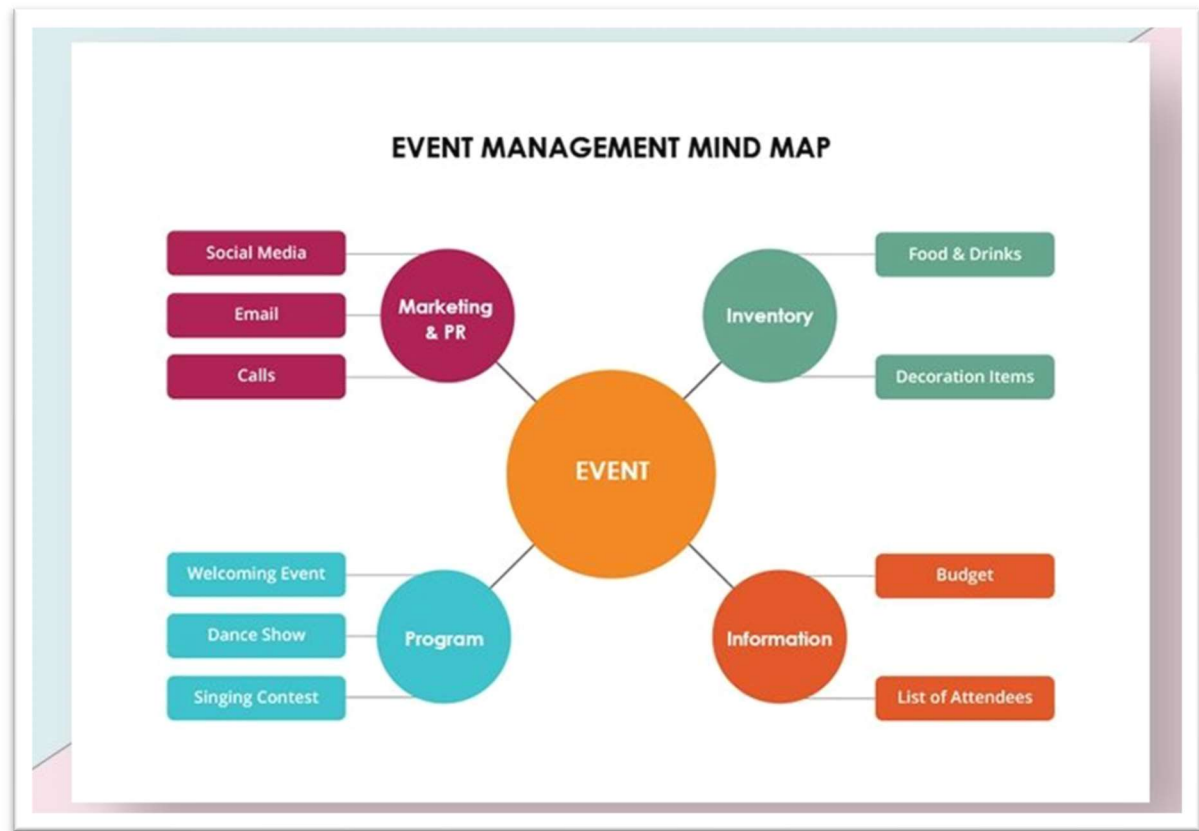
Personalization — Every business is unique. You probably want to see your events info in the context of your leads, contacts, opportunities, etc. which means you'll need to integrate any event management apps you use with your database. In doing so you might run into compatibility issues, certain apps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

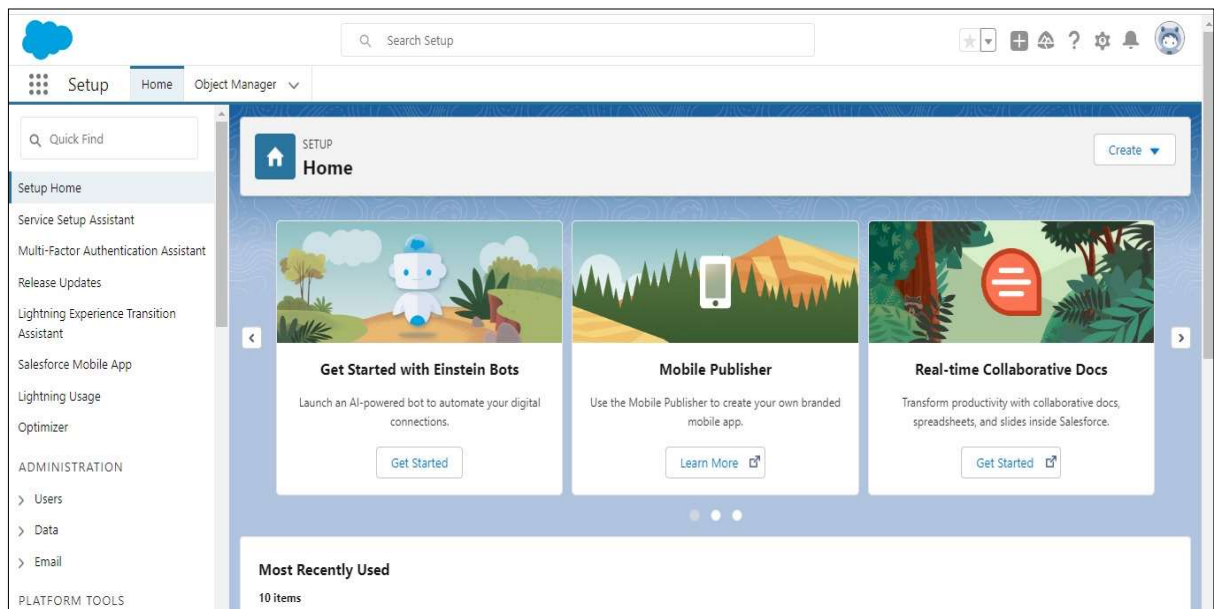
OBJECT NAME	FIELDS IN THE OBJECT	
Event	Field Label	Data Type
	City	Text Area
	Date/Time	Start Date
	Event Name	Master-Detail Relationship

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" page is displayed, showing the "Vendor" object. The left sidebar contains a list of 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 is selected, showing the object's configuration. The "Details" section 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. 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 "Custom Tabs" page is displayed. The left sidebar contains a search bar labeled "tabs" and a list of configuration options: User Interface, Rename Tabs and Labels, and Tabs. The "Tabs" section is selected, showing the "Custom Tabs" page. The "Custom Tabs" page includes a description of custom tabs and a table of existing custom object tabs. The table has columns for Action, Label, Tab Style, and Description. The existing tabs are Attendees, Events, Speakers, and Vendors. The "Web Tabs" section is also visible, showing that no web tabs have been defined.

Setup > CUSTOM 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.

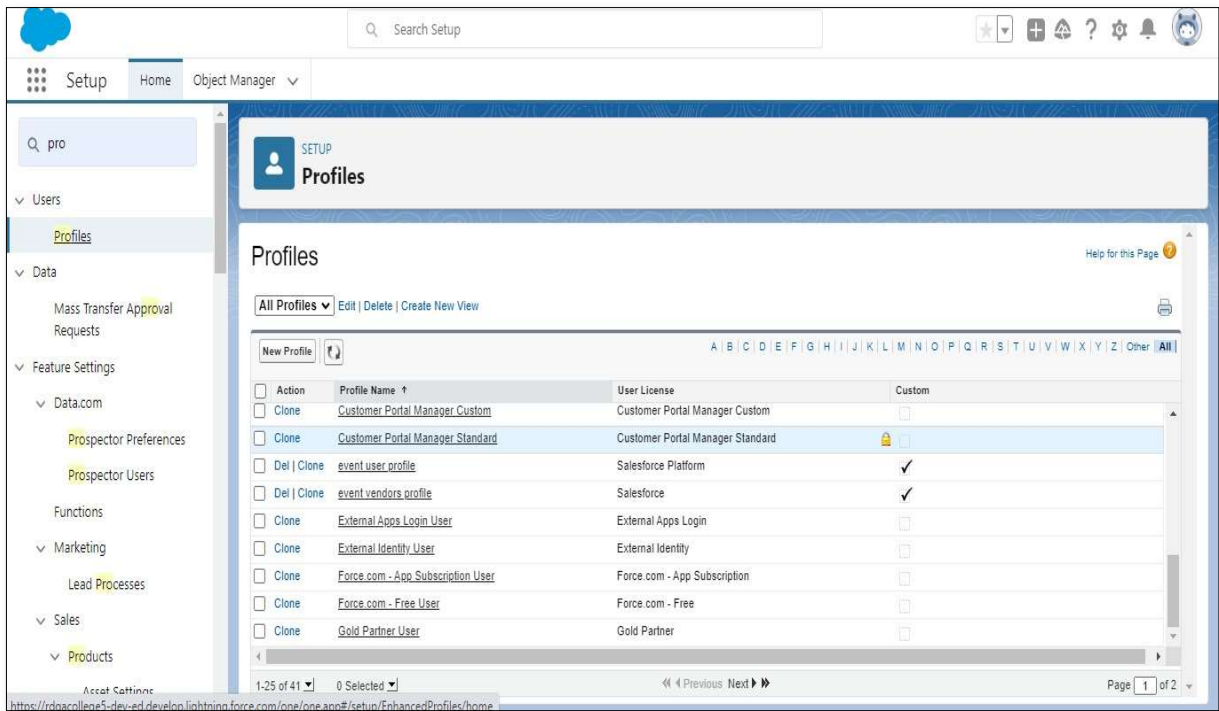
Custom Object Tabs New What Is This?

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

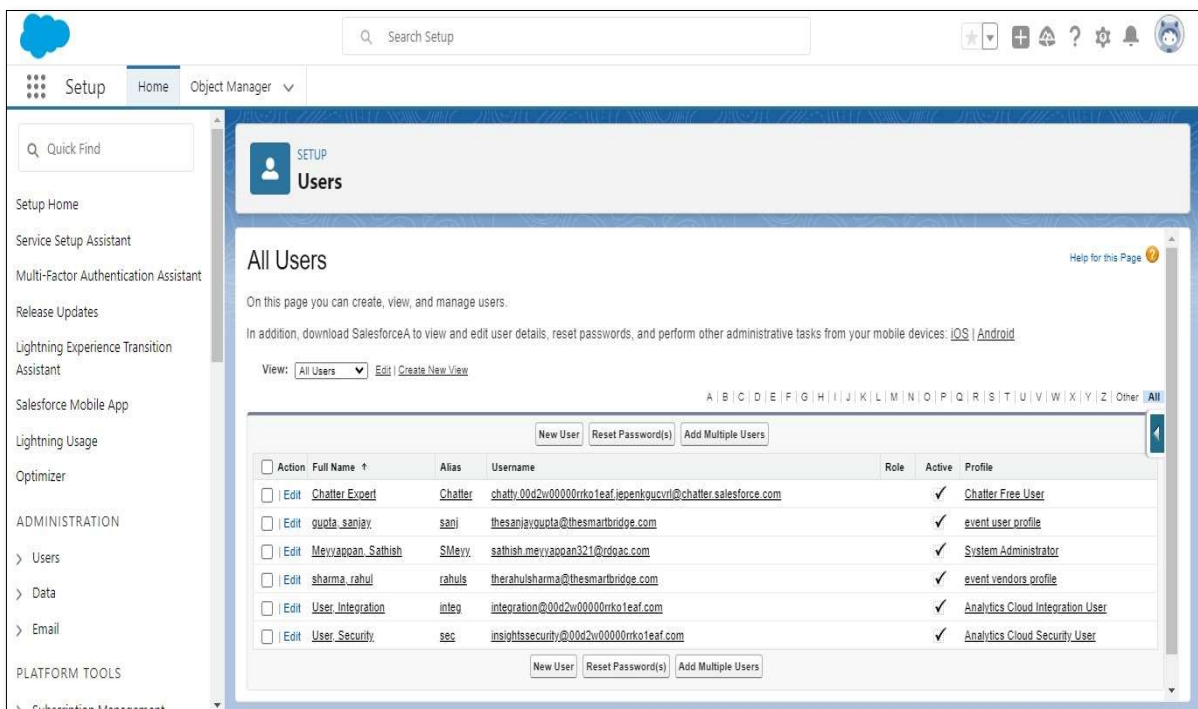
4. Profile



The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. 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 various profiles such as '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 'Custom' column has checkboxes for each profile, with 'event user profile' and 'event vendors profile' checked. The bottom of the page shows pagination information: '1-25 of 41', '0 Selected', and 'Page 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 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"/>

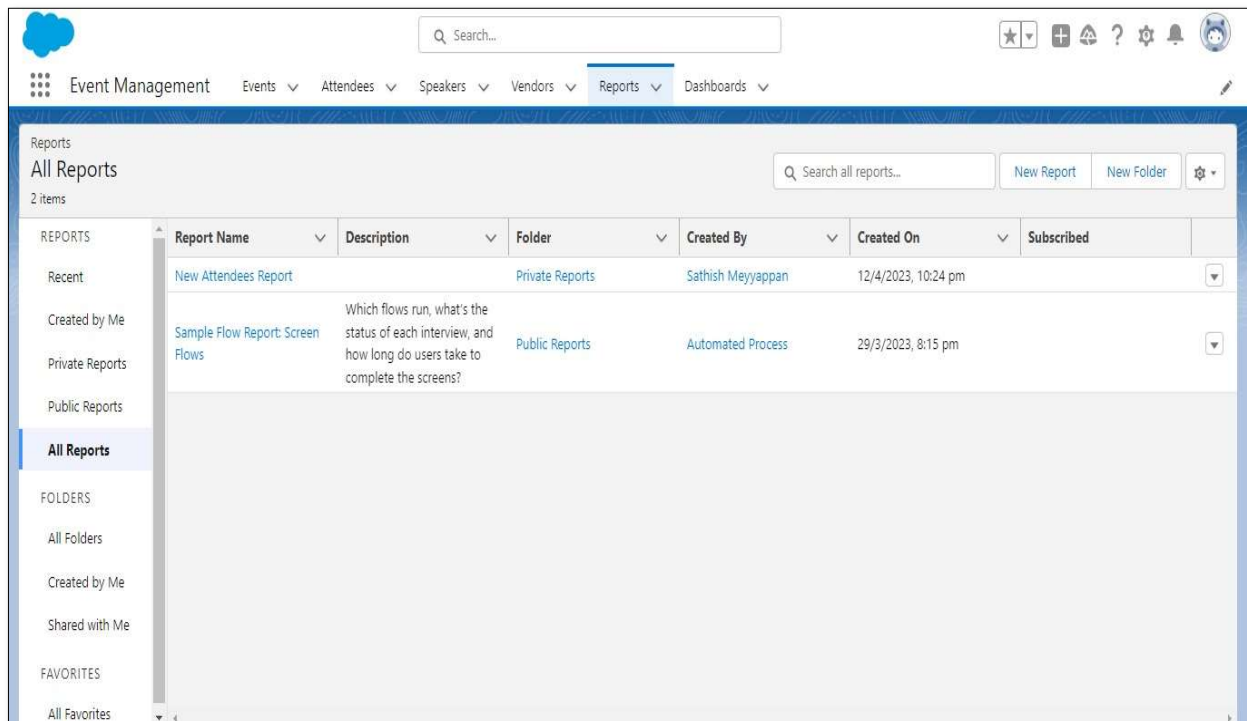
5. User



The screenshot shows the Salesforce Setup interface with the 'Users' page selected. 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 various users such as 'Chatter Expert', 'gupta_sanjay', 'Mevvaqan Sathish', 'sharma_rahul', 'User Integration', and 'User Security'. The 'Active' column has checkboxes for each user, with all users checked. The bottom of the page shows pagination information: '1-25 of 41', '0 Selected', and 'Page 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

6. Reports



The screenshot displays the Salesforce Reports interface. At the top, there's a navigation bar with 'Event Management' and various dropdown menus. Below this, the 'Reports' section is active, showing 'All Reports' with a search bar and buttons for 'New Report' and 'New Folder'. A table lists two reports:

Report Name	Description	Folder	Created By	Created On	Subscribed
New Attendees Report		Private Reports	Sathish Meyyappan	12/4/2023, 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	29/3/2023, 8:15 pm	

The left sidebar shows navigation options like 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports' (selected), 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and '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.

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.