

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.

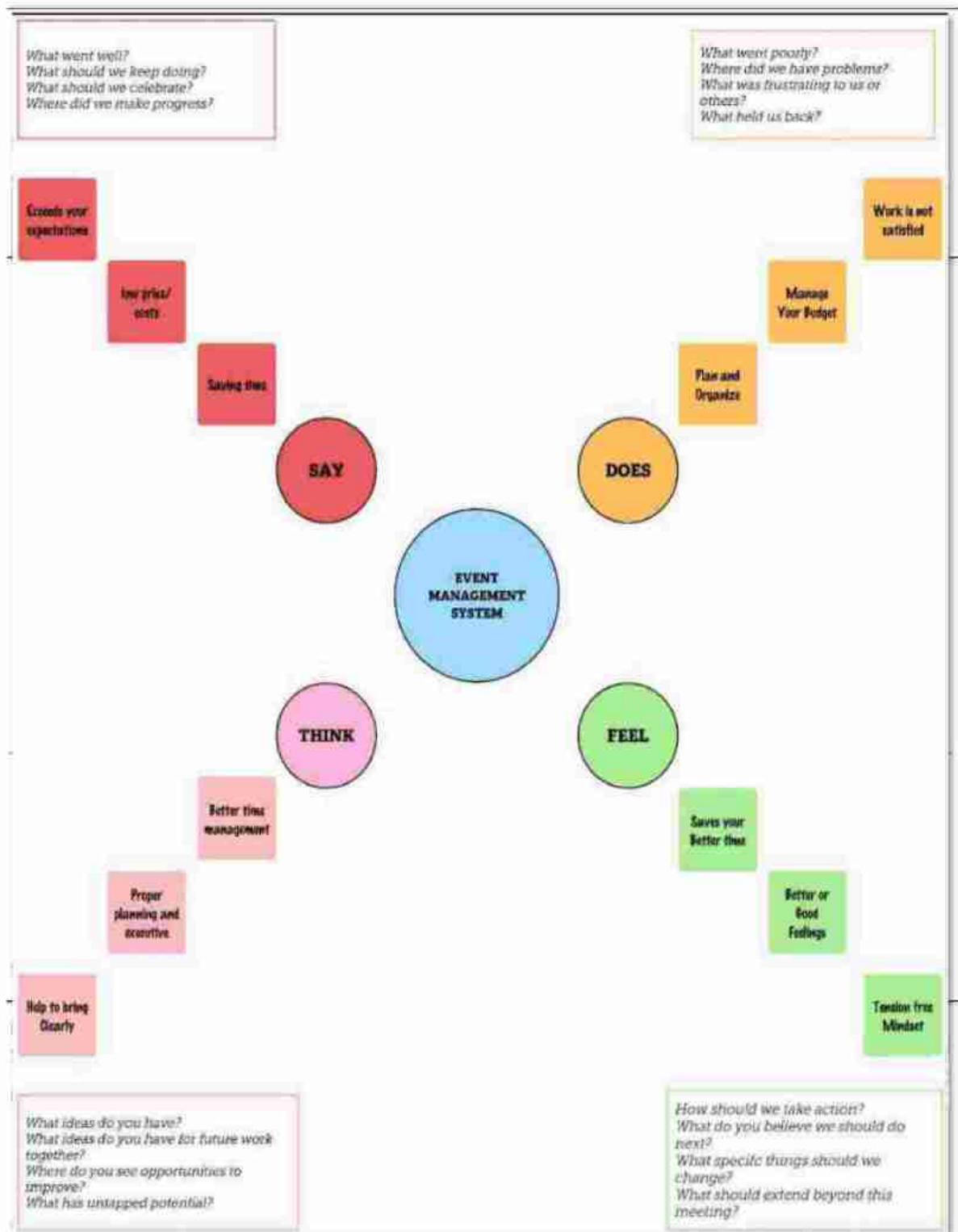
Communication — communications serve as the foundation of your entire event. Every event organizer's worst nightmare is running an event where no one shows up. Every event organizer's second-worst nightmare is running an event where a group of people get the wrong message and forget to show up / show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

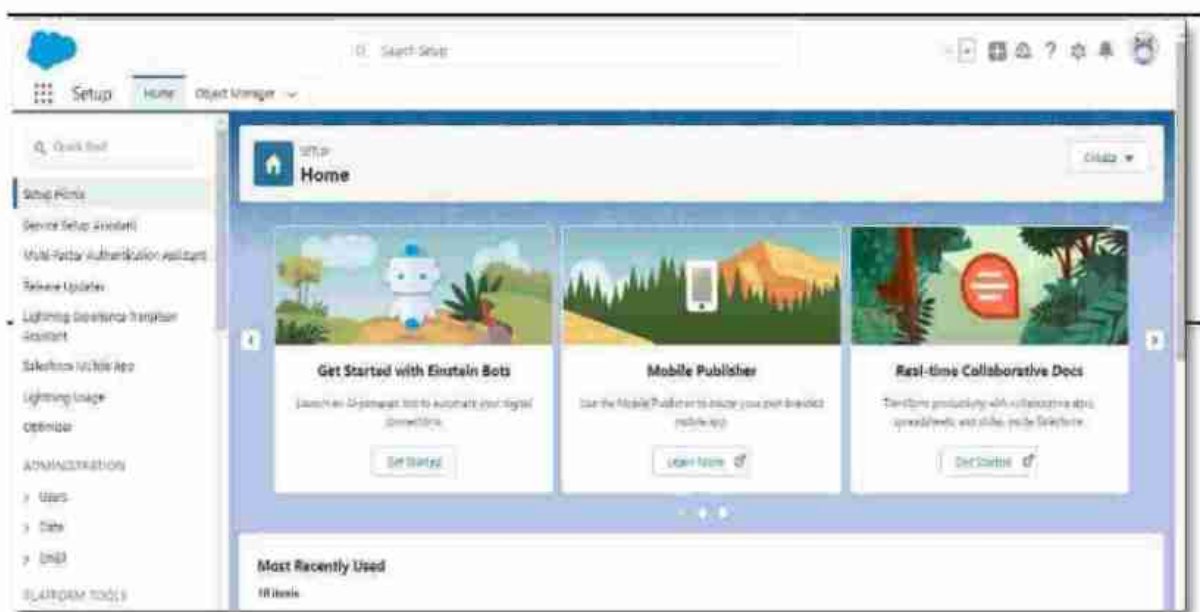
OBJECT NAME	FIELDS IN THE OBJECT	
Event	Field Label	Data Type
	City	Text Area
	Date/Time	Start Date
	Event Name	Master-Detail Relationship

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										
Phone	Phone										
Email	Email										
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										
Bio	Text Area										
Email	Email										
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										
Email	Email										
Phone	Phone										
Service Provider	Text										
Event Name	Look-Up Relationship										

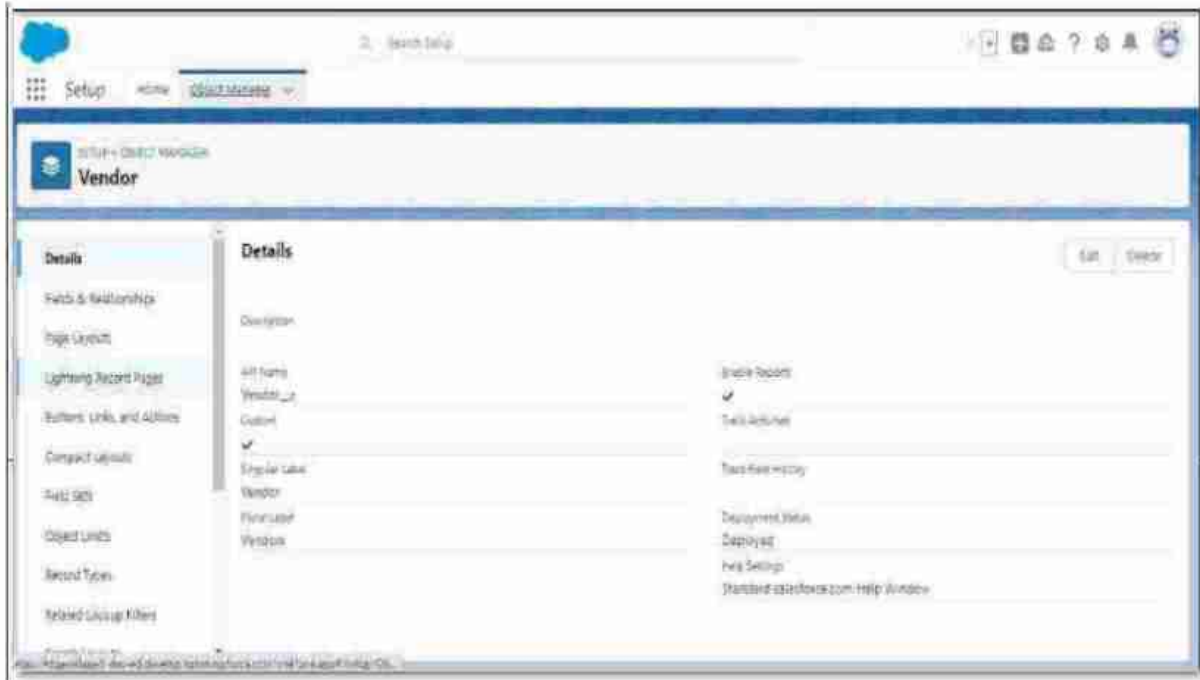
3.1 Activity & Screenshot

1. Salesforce

Home page

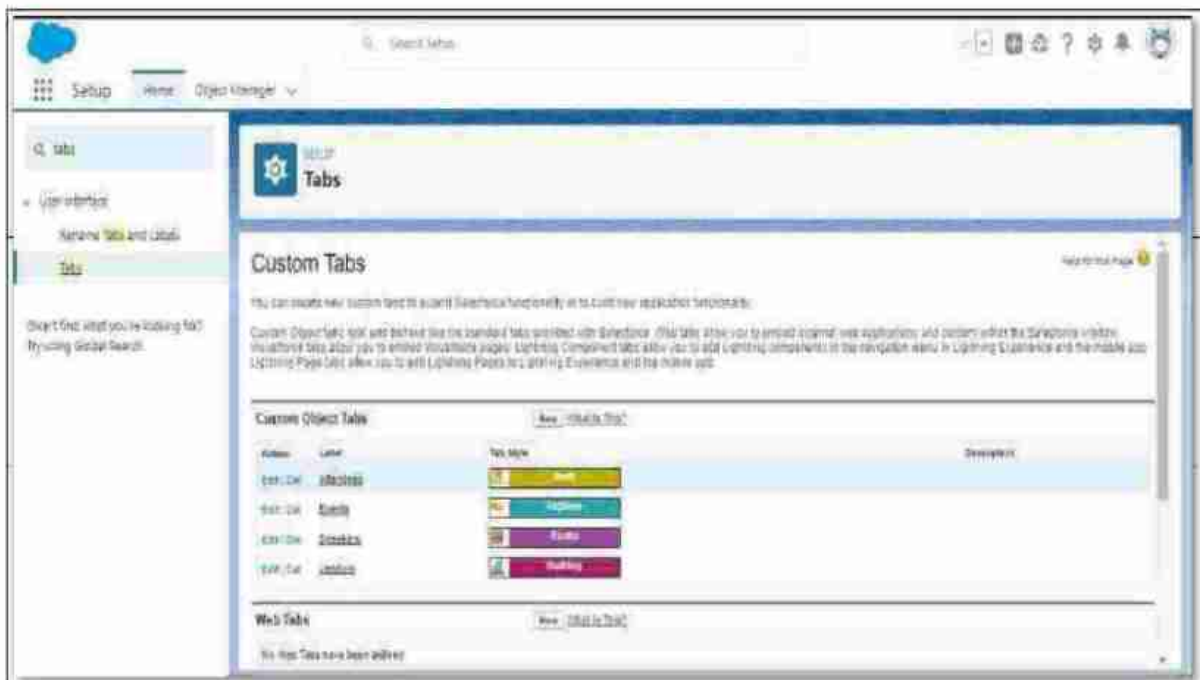


2. Objects

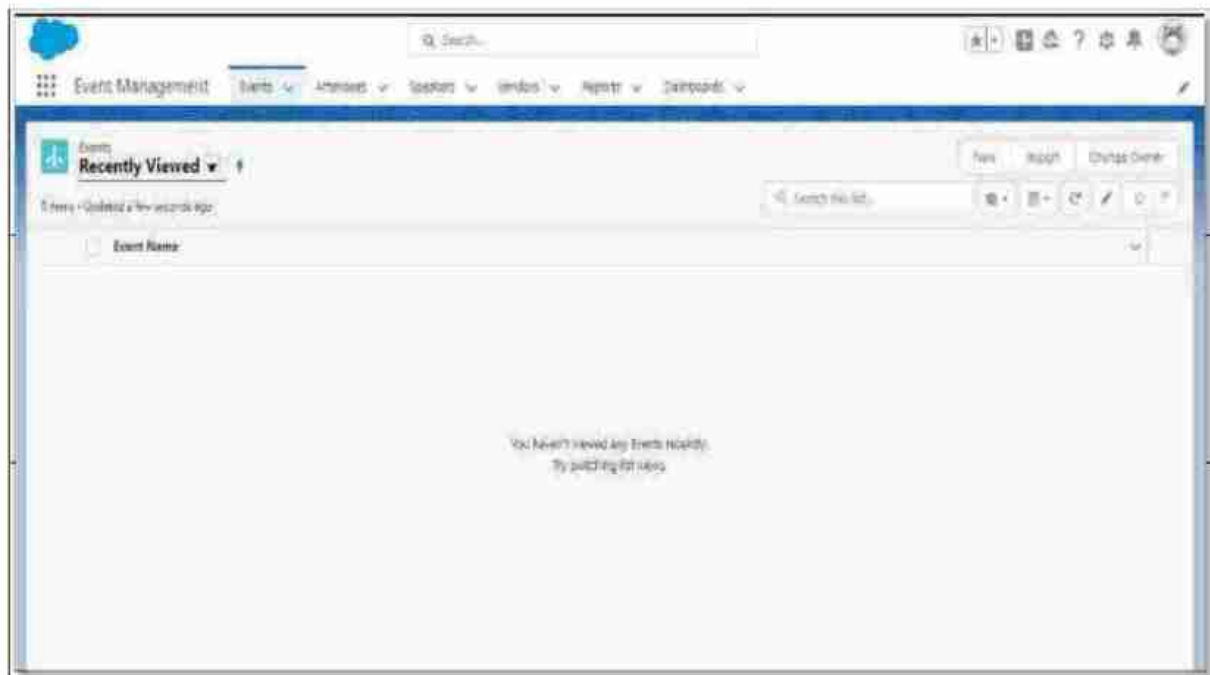


3. Tab

Custom Tabs



Application

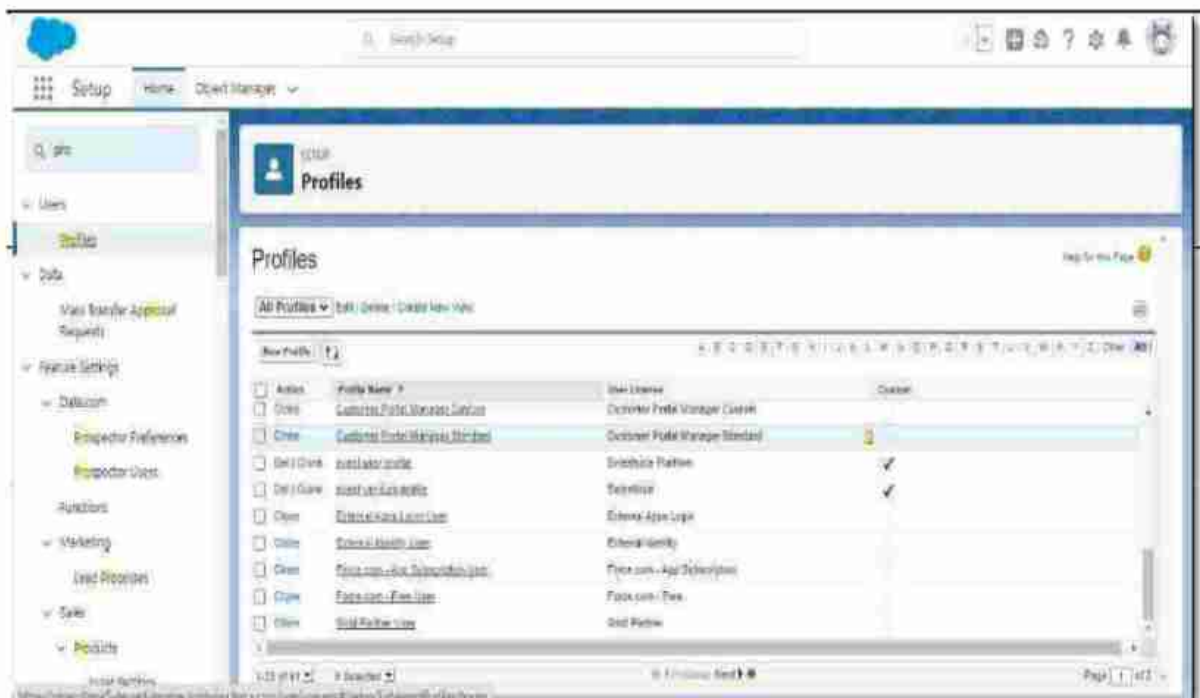


4. Fields

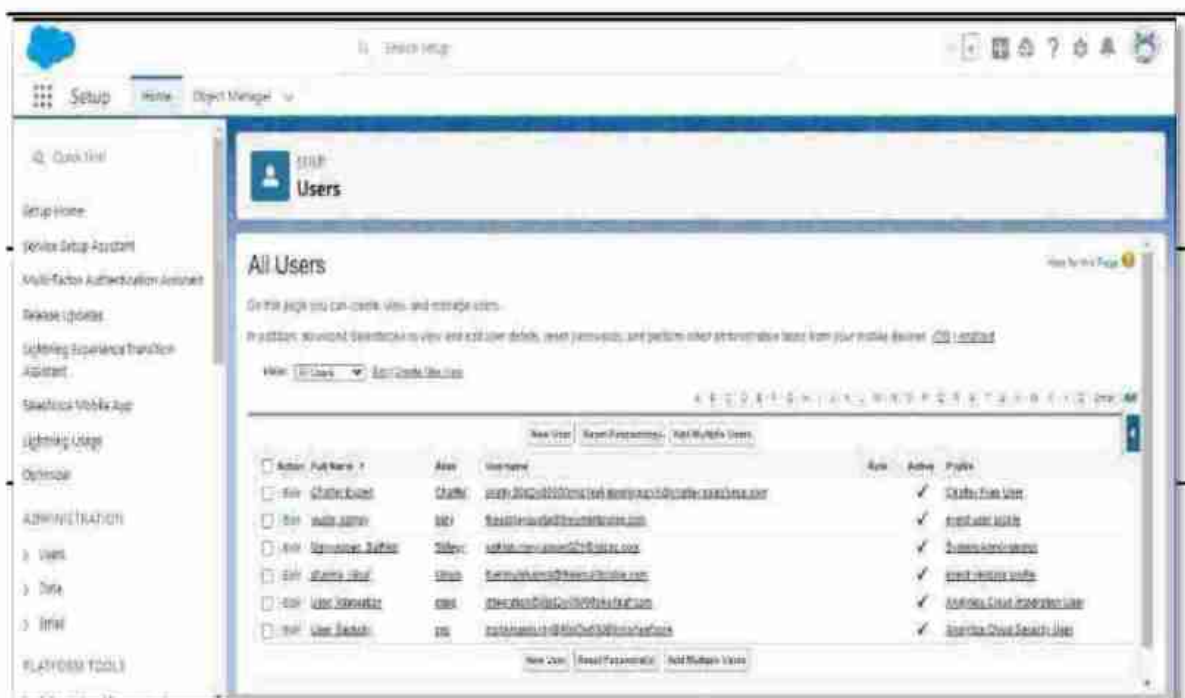
The screenshot shows the 'Object Manager' application interface. The top navigation bar includes a search bar and menu items: Setup, Home, and Object Manager. The main content area is titled 'Object Manager' and 'Setup'. It features a search bar and a table with the header 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The table contains the following data:

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



6. User



7. Permission sets

The screenshot shows the 'Permission Sets' page in a software interface. The left sidebar contains a navigation menu with options like 'Setup', 'Home', 'Object Manager', 'Users', 'Permission Set Groups', 'Permission Sets', 'Feature Settings', 'Digital Experiences', 'Settings', 'Integrations', 'Sales', 'Accounts', 'System Accounts', 'Salesforce Scheduler', 'Assignment Policies', 'Salesforce Scheduler', and 'Reports'. The main content area is titled 'Permission Sets' and has a 'Create' button. Below this, there is a section 'Enter permission set information' with fields for 'Label', 'API Name', and 'Description'. There is also a checkbox for 'Grant Access to Records'. Below this, there is a section 'Select the type of users who will use this permission set' with a dropdown menu and a list of 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. Choose a specific permission set license if you want this permission set license to be assigned with the permission set.'

8. Reports

The screenshot shows the 'Reports' page in a software interface. The left sidebar contains a navigation menu with options like 'Event Management', 'Events', 'Attendees', 'Speakers', 'Vendors', 'Reports', and 'Dashboards'. The main content area is titled 'Reports' and has a 'New Report' button. Below this, there is a table with columns: 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The table contains two rows of data.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Attendee Report		Private Reports	Samuel Mayagual	1/24/2023 10:04 pm	
Weekly Report Summary	Which days run, what's the status of each interview, and how long do users take to complete the interview?	Public Reports	Automated Process	25/1/2023 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.