

# BUILD AN EVENT MANAGEMENT SYSTEM USING SALESFORCE

PROJECT BASED EXPERIMENTAL

LEARNING PROGRAM

SALESFORCE

# INTRODUCTION

## 1.1 OVERVIEW

Event management is the process of creating and maintaining an event .

This process spans from the every beginning of planning all way to post event

strategizing.

At the start, an event manager makes planning decision, such as the time , location and theme of the event during an event , event managers

All different branches of planning go into event management , including variuos type of sourcing, designing, regulation checks, and on-site management. In event management you could be in the process creating a conference, a product launch an internal sales kick-off, or even a wedding. Really, any event that requires considerable planning and excution is event management.

## 1.2 PURPOSE

An event management system hepls oragnizers plan execute and report on events, driving success for their business.Purpose to manage events throughout their lifecycle is the process of event management.An event theme is the bid idea behind the entire shinding . It ofen involves the overall

tone, structure and goals of the event .

An event concept sounds similar but is distinctly unique . An event concept is the event details and elements that make up the practical aspects of the event management.

An event management system within salesforce allows you to access all relevant data in one centralized location- your database. To manage all event related task without leaving salesforce, providing you with a seamless and comprehensive event- planning experience.

## **2. PROBLEM DEFINITION & DESIGN THINKING**

### **2.1 Empathy map**



## Reflect on the topic

Working silently and individually, have each person create a few sticky notes in all four quadrants below for about five minutes. With the remaining time, discuss notes in each quadrant.

### What went well?

What should we keep doing?  
What should we celebrate?  
Where did we make progress?

TOPIC

**BUILD AN EVENT  
MANAGEMENT SYSTEM  
USING SALESFORCE**

GAIN INSIGHTS  
TO THE  
SHORTCOMING  
OF PAST EVENT  
MANAGEMENT  
APPROCHES

REAL TIME  
SALESFORCE  
PROJECT

OBJECT &  
RELATIONSHIP  
IN SALESFORCE

AN EVENT  
MANAGER MAKES  
PLANNING  
DECISIONS, SUCH  
AS TIME,  
LOCATION, ETC



FIRST, CREATE  
DIFFERENT  
PROJECTS FOR  
EACH  
PROJECTS

USE THOSE  
PROJECTS  
TO CREATE  
TEMPLATES

THE TEMPLATES  
CAN BE USED TO  
AUTOMATICALLY  
CREATE NEW  
PROJECTS FROM  
CAMPAGAINS



## 2.2 Ideation & Brainstorming Map

12:49



VoLTE

4G

62

# ← BRAINSTONE (1)



1

## Choose your best "How Might We" Questions

Share the top 5 brainstorm questions that you created and let the group determine where to begin by selecting one question to move forward with based on what seems to be the most promising for idea generation in the areas you are trying to impact.

10 minutes

QUESTION  
How might we... [insert problem statement here?]

QUESTION  
How might we... [insert problem statement here?]

QUESTION  
How might we... [insert problem statement here?]

QUESTION  
How might we... [insert problem statement here?]

QUESTION  
How might we... [insert problem statement here?]

2

## Brainstorm solo

Have each participant begin in the "solo brainstorm space" by silently brainstorming ideas and placing them into the template. This "silent storming" avoids group think and creates an inclusive environment for introverts and extroverts alike. Set a time limit. Encourage people to go for quantity.

10 minutes

FERTHUSNISHA M

QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME

DHEEP KUMAR R

QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME

SUMALAI P

QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME

BLANCHEZHIAN R

QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME

Person 5

QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME

Person 6

QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME

Type your heading...

QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME

Person 8

QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME
QUESTION	LOCATION	TIME

3

## Brainstorm

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15 minutes

### 3. RESULT

#### 3.1 Data Model:

##### 1. Data Model:



OBJECT

NAME

FIELDS IN THE OBJECT

FIELD LABEL DATA TYPE

OBJECT 1 EVENT TEXT

OBJECT 2 ATTENDEES PHONE

OBJECT 3 SPEAKER TEXT AREA

OBJECT 4 VENDORS PHONE

3.2 ACTIVITY & SCREEN SHORT

Home | Salesforce | Event | Salesforce | Attendee | Salesforce

dmrgovernmentartsandscie8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000048WQJQ/Details/view

Search Setup

Setup Home Object Manager

### Attendee

Details

Fields & Relationships  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Limits  
Record Types  
Related Lookup Filters  
Search Layouts

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

Edit Delete

Home | Salesforce | Event | Salesforce | Attendee | Salesforce | Speaker | Salesforce | Vendor | Salesforce

dmrgovernmentartsandscie8-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000048WQJQ/Details/view

Search Setup

Setup Home 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  
Search Layouts

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

Edit Delete

Home | Salesforce | Event | Salesforce | Attendee | Salesforce | Speaker | Salesforce | Tabs | Salesforce

dimrgovernmentartsandsce8-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fu%2Fcustomtabs.jsp%3Fsetupid%3DCust...

Search Setup

Setup Home Object Manager

tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.


### SETUP Tabs

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
<a href="#">Edit</a> / <a href="#">Del</a>	<a href="#">Events</a>	 Checkmark	

#### Web Tabs

New What is This?

No Web Tabs have been defined

#### Visualforce Tabs

New What is This?

No Visualforce Tabs have been defined

#### Lightning Component Tabs

New What is This?

01:41 PM 11-Apr-21

Home | Salesforce | Event | Salesforce | Attendee | Salesforce | Speaker | Salesforce | Tabs | Salesforce

dimrgovernmentartsandsce8-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fu%2Fcustomtabs.jsp%3Fsetupid%3DCust...

Search Setup

Setup Home Object Manager

tab

User Interface

Loaded Console Tab Limit

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#### Custom Object Tabs

New What is This?

Action	Label	Tab Style	Description
<a href="#">Edit</a> / <a href="#">Del</a>	<a href="#">Attendees</a>	 Flashcard	
<a href="#">Edit</a> / <a href="#">Del</a>	<a href="#">Events</a>	 Checkmark	

#### Web Tabs

New What is This?

No Web Tabs have been defined

#### Visualforce Tabs

New What is This?

No Visualforce Tabs have been defined

01:45 PM 11-Apr-21

Home | Salesforce x | Event | Salesforce x | Attendee | Salesforce x | Speaker | Salesforce x | Tabs | Salesforce x | Tabs | Salesforce x

dmrgovernmentartsandscie8-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2Fcustomtabs.jsp%3Fsetupid%3DCust...

Search Setup

Setup Home Object Manager

Q tabs

User Interface

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##### Custom Object Tabs

New What is This?

Action	Label	Tab Style	Description
Edit   Del	Attendees	Handbase	
Edit   Del	Events	Cheekboard	
Edit   Del	Speakers	Manager	

##### Web Tabs

New What is This?

No Web Tabs have been defined.

##### Visualforce Tabs

New What is This?

Home | Salesforce x | Event | Salesforce x | Attendee | Salesforce x | Speaker | Salesforce x | Tabs | Salesforce x | Tabs | Salesforce x | App Manager | Salesforce

dmrgovernmentartsandscie8-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

Mobile Apps

Salesforce

- Salesforce Branding
- Salesforce Navigation
- Salesforce Notifications
- Salesforce Offline
- Salesforce Settings

Packaging

- Installed Packages
- Package Manager
- Package Usage

Feature Settings

- Analytics
- Apps
  - App Install History
  - Auto-Installed Apps
- Data.com
- Field Mapping

### SETUP Lightning Experience App Manager

New Lightning App New Connected App

#### Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#).

Enable App Cloning ☐ Disabled

22 items • Sorted by App Name • Filtered by All appmenuitems • TabSet Type

	App Name	Developer Name	Description	Last Modified	Ap...	VL...
1	All Tabs	AllTabSet		23/03/2023, 10:45 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	23/03/2023, 10:45 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	11/04/2023, 2:08 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your L...	23/03/2023, 10:47 am	Lightning	✓
5	Community	Community	Salesforce CRM Communities	23/03/2023, 10:45 am	Classic	✓



Home | Sales | Event | Sales | Attendee | Speaker | Sales | Tabs | Sales | Tabs | Sales | App Manager | Home | Sales | Users | Sales

dmgrgovernmentartsandscie8-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/pageAddress=%2F0052w00000GerLk%3Fnoredirect%3D1%26isUser...

Search Setup

Setup Home Object Manager

User

Users

User: Rahul Sharma - Salesforce - Developer Edition

Permission Set Assignments | Permission Set Assignments: Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Permission Set Groups | Public Group Membership | Queue Membership | Teams | Metadata in the Role Hierarchy | Default Connected App | Third-Party Account Link | Unrelated Mobile App | Authentication Settings for External Systems | Login History | User Privacy Policy

User Detail

Edit | Sharing | Reset Password | Freeze

User Profile Help for this Page

Name	Rahul Sharma	Role	Customer Support (International)
Alias	Rahul	User License	Salesforce
Email	rahulsharma@gmail.com	Profile	Profile User Profile
Username	rahulsharma@theemartbridge.com	Active	<input checked="" type="checkbox"/>
Nickname	Rahu	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	SDOC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	YORK
Delegated Approver		Data.com User Type	

Home | Sales | Event | Sales | Attendee | Speaker | Sales | Tabs | Sales | Tabs | Sales | App Manager | Home | Sales | Permission | Sales

dmgrgovernmentartsandscie8-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb251bnRlZlZlZWY0UzZXR1cF9wbGF0Zm9ybV9wZXhtcpw2FSZKN1bHRQYWdL...

Search Setup

Setup Home Object Manager

permission set

Users

Permission Set Groups

Permission Sets

Didn't find what you're looking for? Try using Global Search.

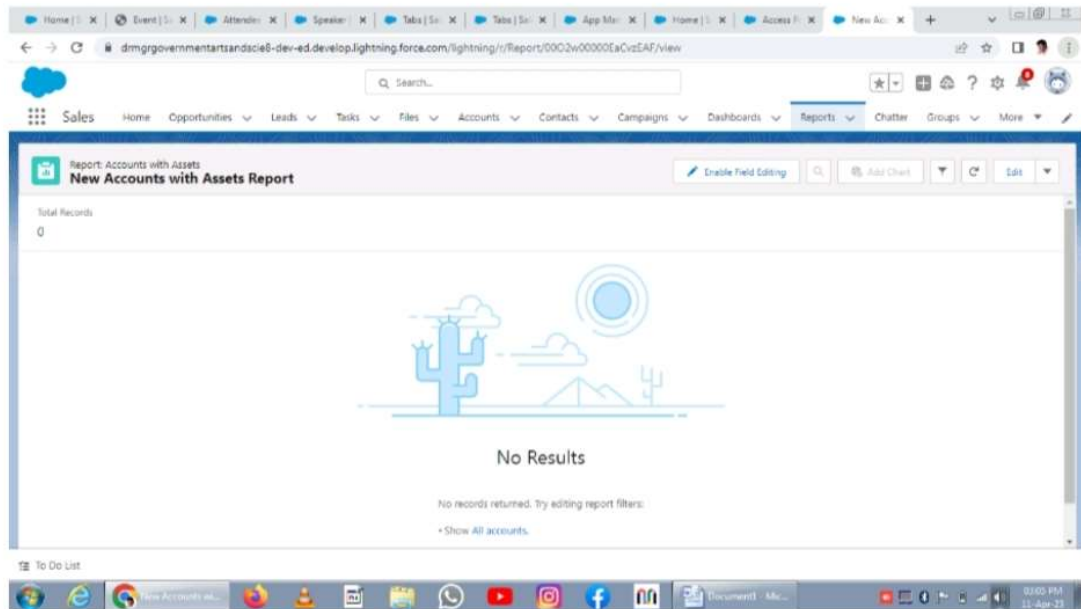
1 assignments were successful.

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Dhanisha A	Salesforce			Success

Done





## 4. TRAILHEAD PROFILE PUBLIC URL

Team leader - <https://trailblazer.me/id/nyasin3>

Team member 1-<https://trailblazer.me/id/dhilip4>

Team member 2-<https://trailblazer.me/id/elumalai12>

Team member 3-<https://trailblazer.me/id/elanzheyian67>



## 5. ADVANTAGE & DISADVANTAGE

### 5.1 ADVANTAGE

Finalizing contracts with vendors and performers

Organizing transportation

Designing event documents

Securing a venue for the event

Resolving issues during the event

### 5.2 DISADVANTAGE

Customer support has a poor reputation

Configuration and setup is complex and time consuming

The learning curve never seems to end

Cluttered interface makes navigation and simple tasks

unnecessarily complex

You have to pay for add-ons to get the most out of the software

## 6. APPLICATION

Salesforce is the customer relationship management (CRM) platform

.Apps in salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs.

The simplest app usually has just two tabs. Salesforce products include several customer relationship management technologies, including sales cloud, service cloud, marketing cloud, and commerce cloud and platform. Additional technologies include slack, mulesoft, tableau analytics and Trailhead.

## 7. 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. Salesforce has been growing

tremendously its employees, customers, offices throughout the world by providing innovative and best ideas/solutions to solve present generation business problems.

## 8. FUTURE SCOPE

It involves management creation and development of events such as corporate conferences, wedding festivities, formal parties etc. It involves a lot

of research about the brand target audience and the concept of the event before planning the actual event . The scope of event management as a

career in India is vast. It is a thriving industry and is home to a million people.

So, if you have a knack for creativity and want to redesign the perceptions of

society, the event management industry.