

# **Government Arts College Ooty**

## **Department Of Mathematics**

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## **Build An Event Management System Using Salesforce**

### **INTRODUCTION :**

Event management is a complex and multifaceted task that requires attention to detail, effective communication, and seamless coordination. Salesforce, as a cloud-based customer relationship management platform, provides a comprehensive suite of tools for managing events. In this project, we will build an event management system using Salesforce that will enable event organizers to streamline their workflows and ensure a successful event.

### **BODY :**

**The event management system we will build using Salesforce will comprise several modules, including attendee management, agenda management, speaker management, and sponsor/exhibitor management. The attendee management module will allow organizers to capture attendee information, track registration and ticket sales, and generate attendee reports. The agenda management module will enable organizers to create and manage event schedules, track session attendance, and provide real-time updates to attendees.**

**The speaker management module will allow organizers to manage speaker profiles, track speaker availability, and schedule sessions. The sponsor/exhibitor management module will enable organizers to manage sponsor/exhibitor profiles, track sponsorship levels, and allocate exhibit space.**

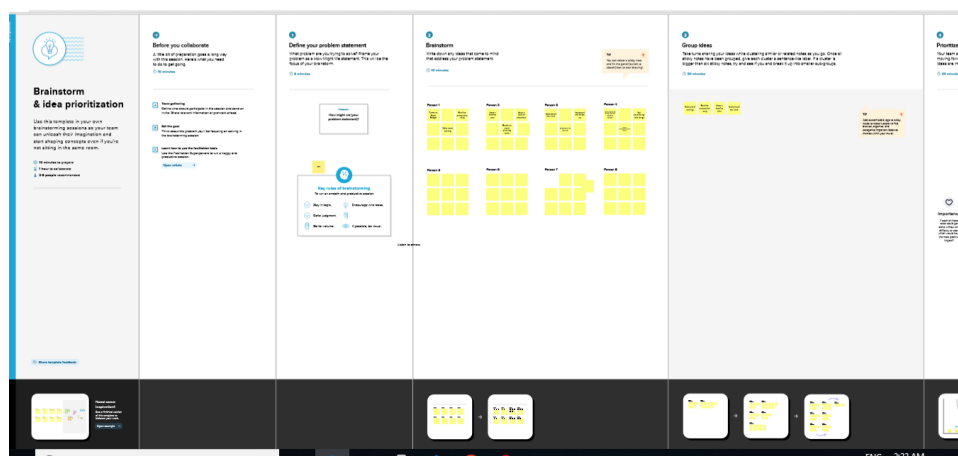
**The event management system will also include a communication module that will allow organizers to send event-related communications, such as registration confirmations, session reminders, and sponsor/exhibitor updates. The system will also provide real-time analytics and reporting, enabling organizers to track attendance, monitor event performance, and make data-driven decisions.**

## **PROBLEM DEFINITION & DESIGN THINKING :**

### **EMPATHY MAP :**



## IDEATION & BRAINSTORMING MAP :

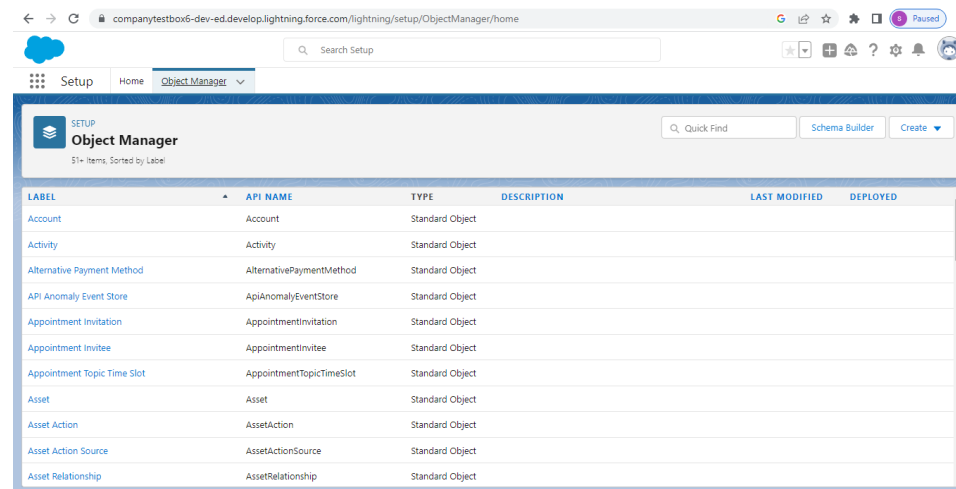
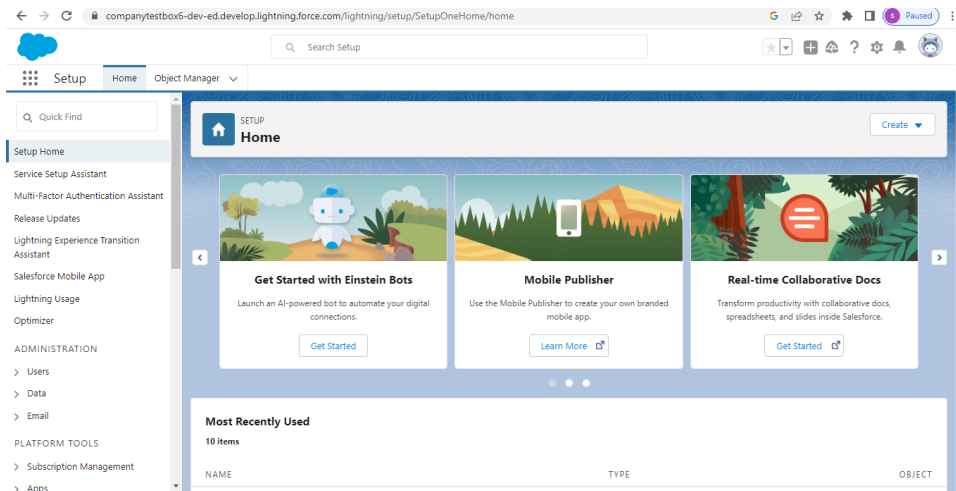
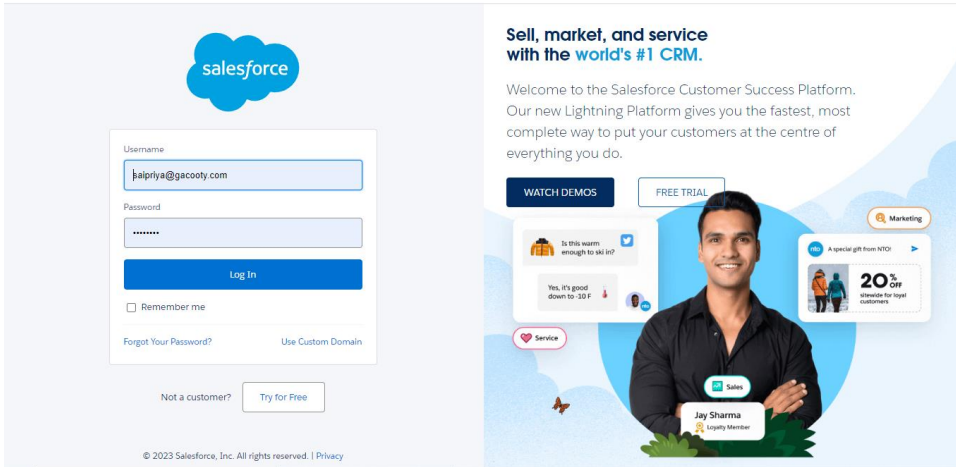


## RESULT:

### Data Model :

Object	Fields in the Object	
Event	Field Label	Datatype
	City	Text
	Start Date	Date/Time
	End Date	Date/Time
Attendees	Field Label	Data Type
	Id	Auto Number
	Phone	Number
	Email	Email
	Tickets	Picklist
Speakers	Field Label	Data Type
	Bio	Text Area
	e-mail	E-Mail
Vendors	Field Label	Data Type
	e-mail	E-Mail
	Phone	Phone
	e-mail	E-Mail
	Service Provider	Text
	Event Name	Lookup Relationship

### ACTIVITY & SCREENSHOT :



companytestbox6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Search Setup

Setup Home Object Manager

SETUP

New Custom Object

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

☐ In Development

☒ Deployed

[What Is This?](#)

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☐ Allow Search

Object Creation Options (Available only when custom object is first created)

☐ Add Notes and Attachments related list to default page layout

☐ Launch New Custom Tab Wizard after saving this custom object

Search Setup

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP

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
<a href="#">Edit</a> <a href="#">Del</a>	Attendees	Bus	
<a href="#">Edit</a> <a href="#">Del</a>	Events	Computer	
<a href="#">Edit</a> <a href="#">Del</a>	Scanners	Cell phone	
<a href="#">Edit</a> <a href="#">Del</a>	Windows	Monitor	

Web Tabs

New What Is This?

No Web Tabs have been defined

Mobile Menu Tabs

New What Is This?

Search Setup

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP

Tabs

New Custom Object Tab

Help for this Page

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

Object --None--

Tab Style --None--

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.  
Splash Page Custom Link --None--

Enter a short description.  
Description

companytestbox6-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app manager

Apps

App Manager

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

### 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		11/03/2023, 8:33 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	11/03/2023, 8:33 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	11/03/2023, 8:33 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your in...	11/03/2023, 8:35 pm	Lightning	✓
5	Community	Community	Salesforce CRM Communities	11/03/2023, 8:33 pm	Classic	✓

companytestbox6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

### Account

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

List View Button Layout

#### New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

Data Type

☒ None Selected

Select one of the data types below.

☐ Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

companytestbox6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/FieldsAndRelationships/new

Setup

Account

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

Account

New Custom Field

Step 1. Choose the field type

Specify the type of information that the custom field will contain.

None Selected

Select one of the data types below

Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

companytestbox6-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Setup

Profiles

profile

Users

Profiles

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

Profiles

All Profiles

New Profile

Action	Profile Name	User License	Custom
<a href="#">Edit   Clone</a>	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Chatter External User	Chatter External	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Chatter Free User	Chatter Free	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Contract Manager	Salesforce	<input type="checkbox"/>
<a href="#">Edit   Clone</a>	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<a href="#">Edit   Del</a>	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>

1-10 of 420 Selected4 PreviousNextPage 1 of 5

companytestbox6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Account/FieldsAndRelationships/view

Setup

Account

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

Fields & Relationships

33+ Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Name	Name		✓
Account Number	AccountNumber	Text(40)		
Account Owner	OwnerId	Lookup(User)		✓
Account Site	Site	Text(80)		
Account Source	AccountSource	Picklist		
Active	Active_c	Picklist		
Annual Revenue	AnnualRevenue	Currency(18, 0)		
Billing Address	BillingAddress	Address		
Clean Status	CleanStatus	Picklist		✓



companytestbox6-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

Setup Home Object Manager

profile

Users

Profiles

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

### SETUP Profiles

#### Profiles

Help for this Page

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
Edit   Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit   Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit   Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit   Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit   Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit   Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit   Clone	Contract Manager	Salesforce	<input type="checkbox"/>
Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
Edit   Del ...	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>

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companytestbox6-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home

Search Setup

Setup Home Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

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

### SETUP Permission Sets

#### Permission Sets

Help for this Page

On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All Permission Sets Edit Delete Create New View

New

Action	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see products and c...	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to mana...	B2B Buyer Manager Permission Set One Seat
Clone	CRM User	Denotes that the user is a Sales Cloud or Service Cloud u...	CRM User
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seats
Clone	Contact Center Admin	Manage Service Cloud Voice contact centers that use Am...	Service Cloud Voice User
Clone	Contact Center Agent	Access agent features in Service Cloud Voice contact cent...	Service Cloud Voice User
Clone	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact...	Service Cloud Voice User
Del   Clone	Event permit		
Del   Clone	Experience Profile Manager		Salesforce

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companytestbox6-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mnu

Search...

Event management Events Attendees Speakers vendors Reports Dashboards

### Reports

Recent

1 item

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Attendees Report		Private Reports	vignesh K	12/3/2023, 3:16 pm	

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

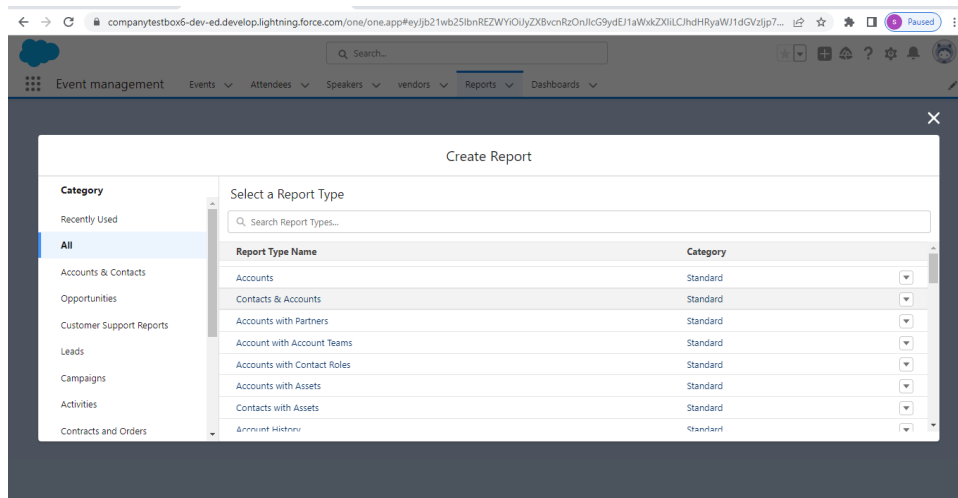
All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites



## TRAILHEAD PROFILE PUBLIC URL:

**Team Leader - <https://trailblazer.me/id/vignk20>**

**Team Member 1- <https://trailblazer.me/id/sramalingam31>**

**Team Member 2- <https://trailblazer.me/id/umageshwaris>**

**Team Member 3- <https://trailblazer.me/id/sowmp14>**

## ADVANTAGE & DISADVANTAGE :

### Advantage of event management :

**There are several advantages of event management, including:**

**Strategic planning: Event management involves detailed planning, from conceptualization to execution, which helps to ensure**

**that the event meets its objectives and is aligned with the organization's overall strategy.**

**Efficient use of resources: Effective event management involves careful allocation and management of resources, such as time, money, and personnel. This ensures that the event is delivered within the allocated budget and achieves maximum impact with minimum wastage.**

**Professionalism and expertise : Event management professionals have specialized knowledge and experience in planning and executing events, which helps to ensure that the event is of high quality and runs smoothly.**

**Brand building : Events provide an opportunity for organizations to showcase their brand, products, or services, and to build relationships with customers, stakeholders, and the wider community. A well-executed event can enhance an organization's reputation and increase its visibility.**

**Networking and relationship building : Events bring together people from different industries and backgrounds, providing opportunities for networking and relationship building. This can lead to new partnerships, collaborations, and business opportunities.**

**Measurable results : Event management involves setting clear objectives and measuring the outcomes of the event against those objectives. This helps to determine the success of the event and identify areas for improvement in future events.**

## **Disadvantage of event management using Salesforce**

**While Salesforce can be a useful tool for event management, there are also potential disadvantages to using it for this purpose, including:**

**Cost:** Salesforce is a powerful tool, but it can also be expensive, particularly if you need to purchase additional modules or integrations to fully support your event management needs.

**Complexity:** Salesforce can be a complex platform to navigate, particularly if you are not familiar with its features and functionality. This can make it challenging to set up and manage your event management processes, which may require additional training or support.

**Customization:** While Salesforce is highly customizable, this can also be a double-edged sword. Creating custom workflows or fields can require significant time and resources, and may also require the expertise of a Salesforce developer or consultant.

**Integration:** While Salesforce is designed to integrate with a wide range of third-party applications and services, integrating these tools can also be complex and time-consuming.

**Data management:** Salesforce is a powerful data management tool, but this also means that it can be challenging to

**manage and maintain large volumes of data related to your event management processes. This can require additional resources and expertise to ensure that your data remains accurate and up-to-date.**

## **APPLICATIONS :**

### **Application of event management using Salesforce**

**Salesforce can be used for various aspects of event management, including:**

**Event registration and attendee management: Salesforce can be used to manage the registration process for events, including capturing attendee information, managing ticket sales, and sending out confirmation and reminder emails.**

**Agenda and session management: Salesforce can be used to manage the agenda and session details for events, including scheduling sessions, managing speaker information, and publishing session details to attendees.**

**Venue and logistics management: Salesforce can be used to manage the logistics of events, including managing venue details, coordinating vendors, and managing equipment and supplies.**

**Marketing and promotion: Salesforce can be used to manage the marketing and promotion of events, including creating targeted email campaigns, managing social media promotions, and tracking event-related web traffic.**

**Sponsor and exhibitor management:** Salesforce can be used to manage sponsor and exhibitor relationships, including tracking sponsor and exhibitor details, managing sponsor and exhibitor contracts, and coordinating sponsor and exhibitor logistics.

**Reporting and analytics:** Salesforce can be used to track and analyze event-related data, including attendee demographics, session attendance, and sponsorship and exhibitor ROI

## **CONCLUSION :**

**Conclusion of event management system using Salesforce**

In conclusion, using Salesforce for event management can provide numerous benefits, including streamlining the planning process, improving attendee management, enhancing marketing and promotion, and providing valuable data and analytics. However, there are also potential drawbacks to using Salesforce for event management, including cost, complexity, and the need for customization and integration.

Despite these potential challenges, many organizations have successfully implemented Salesforce for event management, leveraging the platform's flexibility and robust features to optimize their event strategies and drive success. Ultimately, whether or not Salesforce is the right solution for your organization's event management needs will depend on a range of factors, including your budget, technical expertise, and specific event management requirements. Careful consideration of these factors can help ensure that you choose the right platform for your organization's unique needs and objectives.

## **FUTURE SCOPE :**

## **Future scope of event management system using Salesforce**

**The future scope of event management systems using Salesforce is promising, as the platform continues to evolve and expand its capabilities. Some potential future developments in this area may include:**

**Increased automation:** As Salesforce continues to invest in artificial intelligence and machine learning capabilities, event management systems may become increasingly automated, with features such as automated scheduling, attendee recommendations, and personalized content delivery.

**Greater customization:** As more organizations adopt Salesforce for event management, there may be an increased demand for customization and personalization options, allowing organizations to tailor the platform to their specific needs and workflows.

**Enhanced mobile capabilities:** With the increasing use of mobile devices for event management, there may be a greater focus on mobile optimization and mobile-first design, allowing users to access event information and manage their event experience from their mobile devices.

**Integration with other tools and platforms:** Salesforce already integrates with a wide range of third-party tools and platforms, but this integration may become even more seamless and streamlined, allowing organizations to manage all aspects of their event management workflows within a single platform.

**Increased focus on data analytics:** As data continues to play an increasingly important role in event management, there may be a greater focus on data analytics and visualization within Salesforce, allowing

**organizations to gain deeper insights into attendee behavior, event performance, and ROI.**

**Overall, the future of event management systems using Salesforce is likely to be marked by increased automation, customization, mobile optimization, and data analytics, as the platform continues to evolve and meet the changing needs of organizations and event attendees alike.**