



Build An Event Management Using Salesforce

1.Introduction

1.1 Overview

Event management is the process of creating and maintaining an event. This process spans from the very beginning of planning all the way to post-event strategizing.

At the start, an event manager makes planning decisions, such as the time, location and theme Of their event. During an event, event managers oversee the event live and make sure things run smoothly. After an event, event managers are tasked with reviewing event data, submitting KPI and ROI findings, and staying on the ball for any post-event offerings.

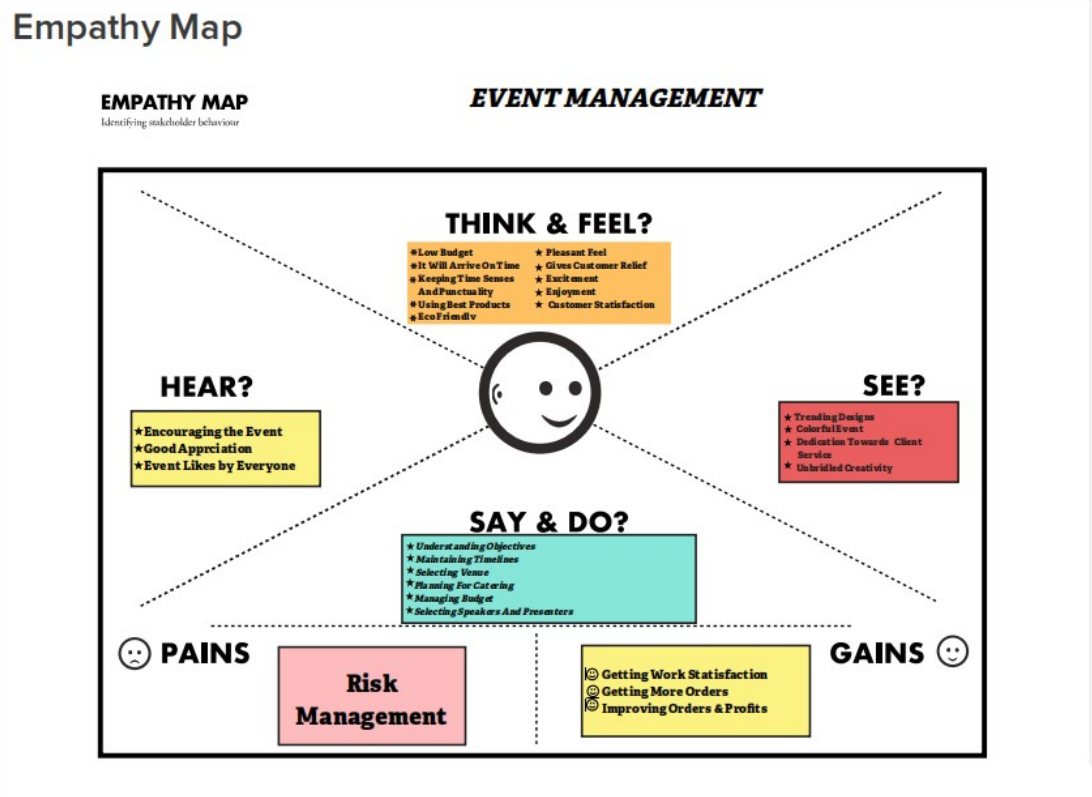
All different branches of planning go into event management including various types of sourcing, designing, regulation checks and on-site management. In event management, you could be in the process of creating a conference, a product launch, an internal sales kick-off or even a wedding. Really any event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

1.2 Purpose

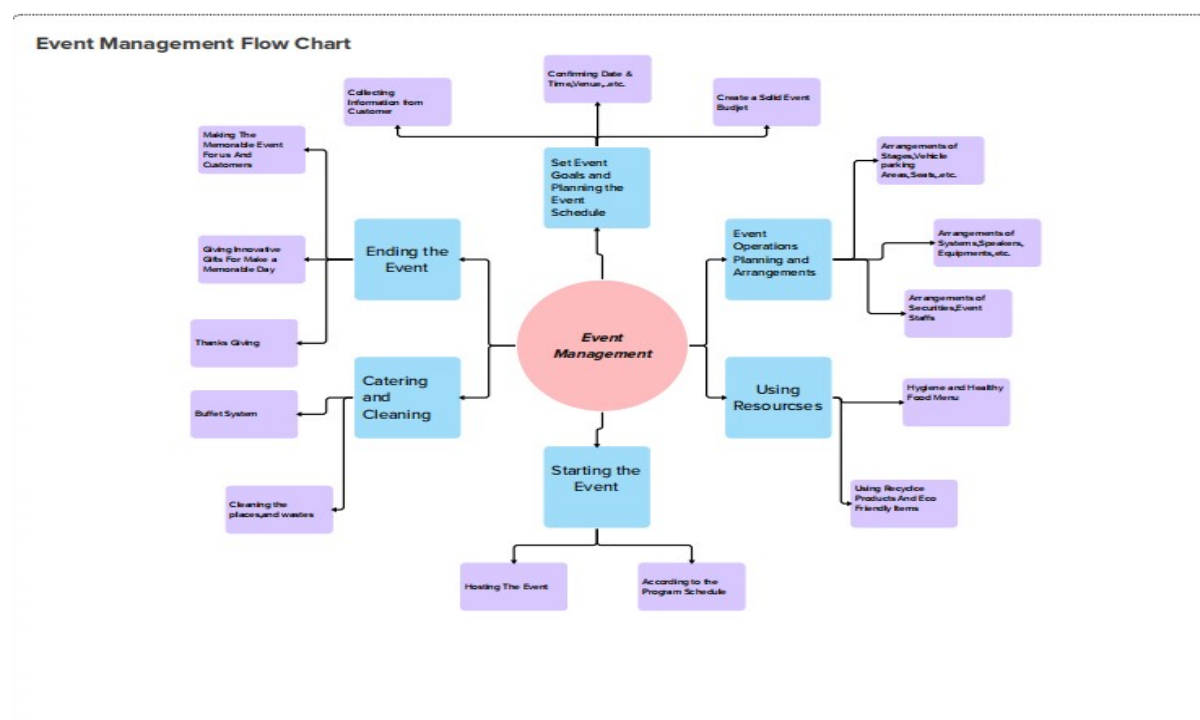
- You'll be able to manage all event-related tasks without leaving Salesforce, providing you with a seamless and comprehensive event-planning experience
- To Manage all event data in one place, you'll need a compatible Salesforce event management app.
- These platforms work together to create a holistic view of your event and constituent data, using intuitive event-planning features such as streamlined guest management, comprehensive analytics, and personalized marketing.
- When choosing your Salesforce event management app, search for software that can work seamlessly within your CRM.
- Using a Salesforce native app means seamless data transfer, up-to-date information and no manual data entry.

2. Problem Definition & Design Thinking

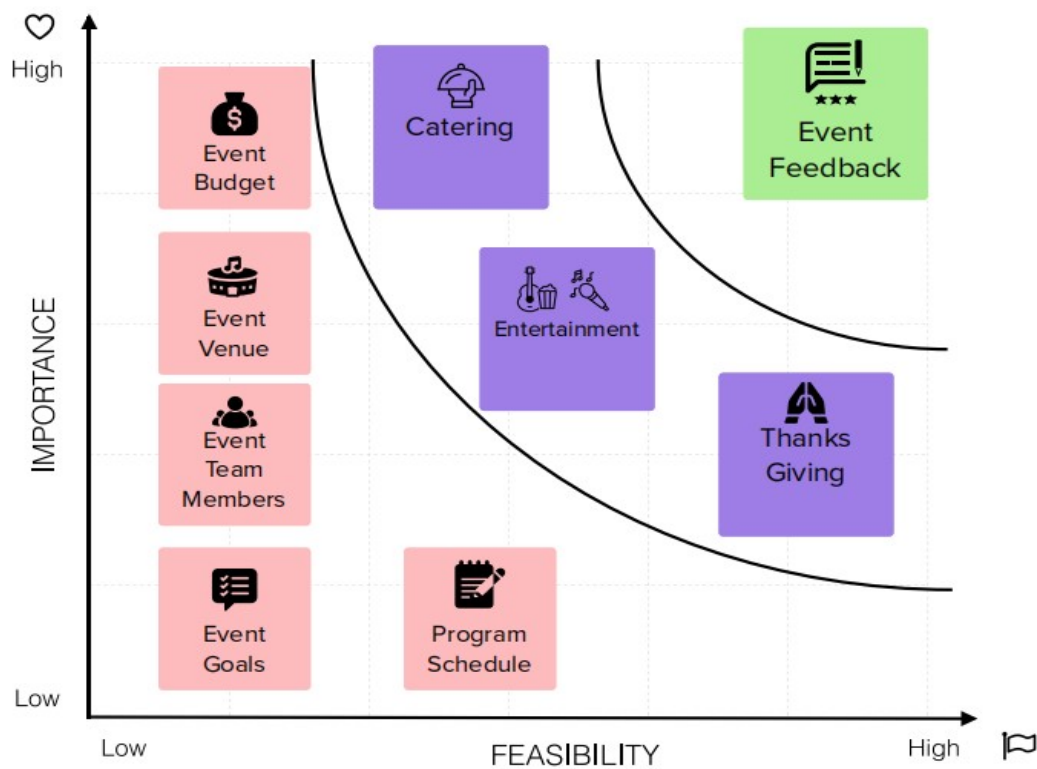
2.1 Empathy Map



2.2 Ideation & Brainstorming Map



Idea Prioritization



3. Result

3.1 Data Model:

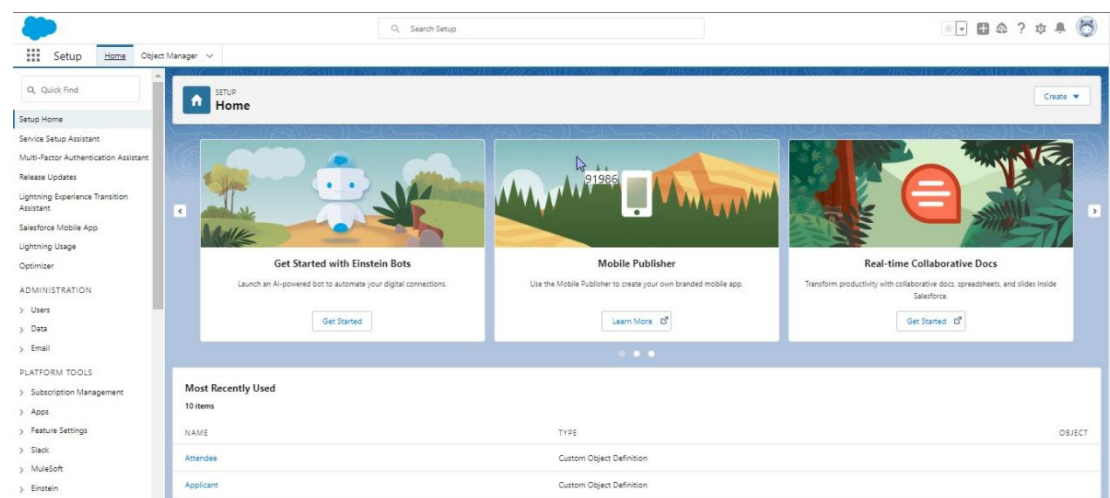
Object name	Fields in the Object	
	Field label	Data type
Event	City	Text
	Start Date	Date/time
	End Date	Date/time
	Event Name	master-detail Relationship
	Event Name	Look-up relationship
Attendee	enter Id	Auto number
	Phone	Phone
	Email	Email
Student	Tickets	Picklist
Speaker	Text Area	enter Bio
	Email	e-mail

Vendor	Email	e-mail
	Phone	Phone
	Service Provider	Text
	Event Name	Look-up Relationship

3.2 Activity: 1

Creating a Salesforce Developer Org:

A Developer org has all the features and licenses you need to get started with Salesforce.



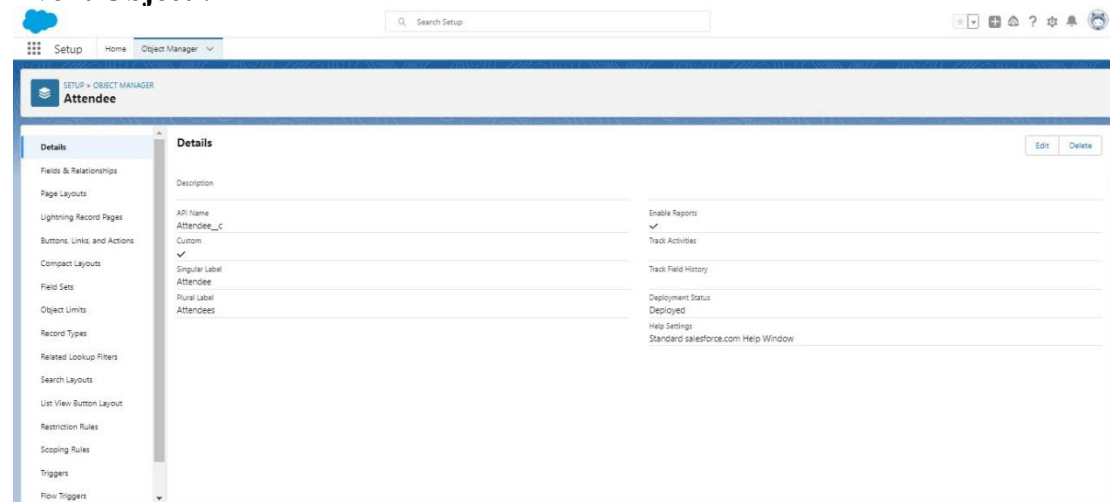
Activity: 2

Creating of Objects for Event Management:

For this Event management we need to create 4 objects

- Events,
- Attendees,
- Speakers &
- Vendors.

Event Object :



Attendee object :

The screenshot shows the Salesforce Setup interface for the 'Event' object. The left sidebar contains a list of configuration categories: 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, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The 'Details' section is selected and expanded, showing the following fields: Description, API Name (Event__C), Custom (checked), Singular Label (Event), and Plural Label (Events). On the right side, there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), and 'Track Field History' (checked). Below these, the 'Deployment Status' is 'Deployed' with a version number of 91986. A link to 'Help Settings' and a link to 'Standard salesforce.com Help Window' are also present.

Setup > OBJECT MANAGER
Event

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

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Details

Description

API Name
Event__C
Custom ✓

Singular Label
Event

Plural Label
Events

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed 91986

Help Settings
Standard salesforce.com Help Window

Speaker object:

The screenshot shows the Salesforce Setup interface for the 'Speaker' object. The left sidebar contains a list of configuration categories: 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, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The 'Details' section is selected and expanded, showing the following fields: Description, API Name (Speaker__C), Custom (checked), Singular Label (Speaker), and Plural Label (Speakers). On the right side, there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), and 'Track Field History' (checked). Below these, the 'Deployment Status' is 'Deployed'. A link to 'Help Settings' and a link to 'Standard salesforce.com Help Window' are also present.

Setup > OBJECT MANAGER
Speaker

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

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Details

Description

API Name
Speaker__C
Custom ✓

Singular Label
Speaker

Plural Label
Speakers

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Vendors object:

The screenshot shows the Salesforce Setup interface for the 'Vendor' object. The left sidebar contains a list of configuration categories: 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, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The 'Details' section is selected and expanded, showing the following fields: Description, API Name (Vendor__C), Custom (checked), Singular Label (Vendor), and Plural Label (Vendors). On the right side, there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), and 'Track Field History' (checked). Below these, the 'Deployment Status' is 'Deployed'. A link to 'Help Settings' and a link to 'Standard salesforce.com Help Window' are also present.

Setup > 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

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Details

Description

API Name
Vendor__C
Custom ✓

Singular Label
Vendor

Plural Label
Vendors

Enable Reports
✓

Track Activities
✓

Track Field History
✓

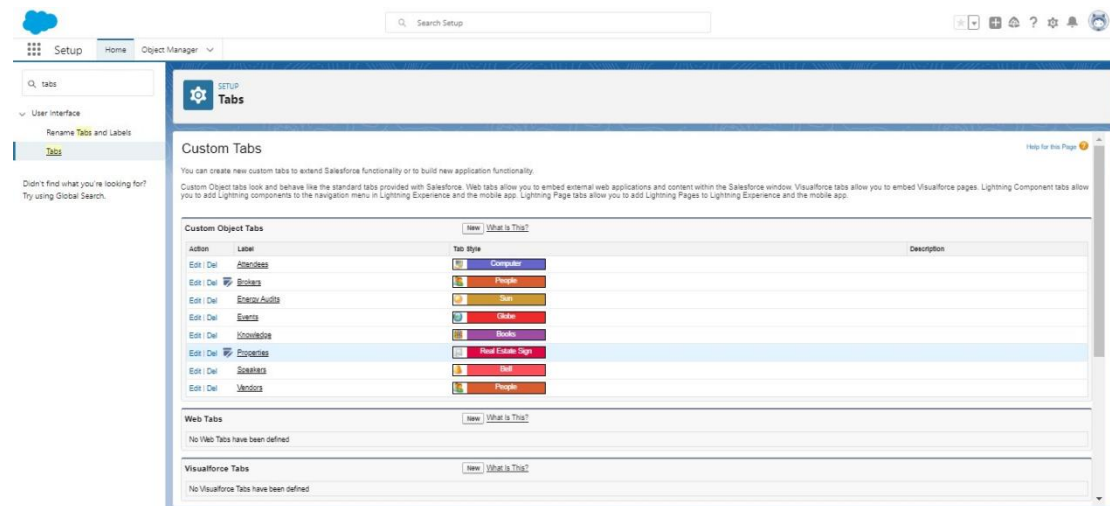
Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Creation of tabs:

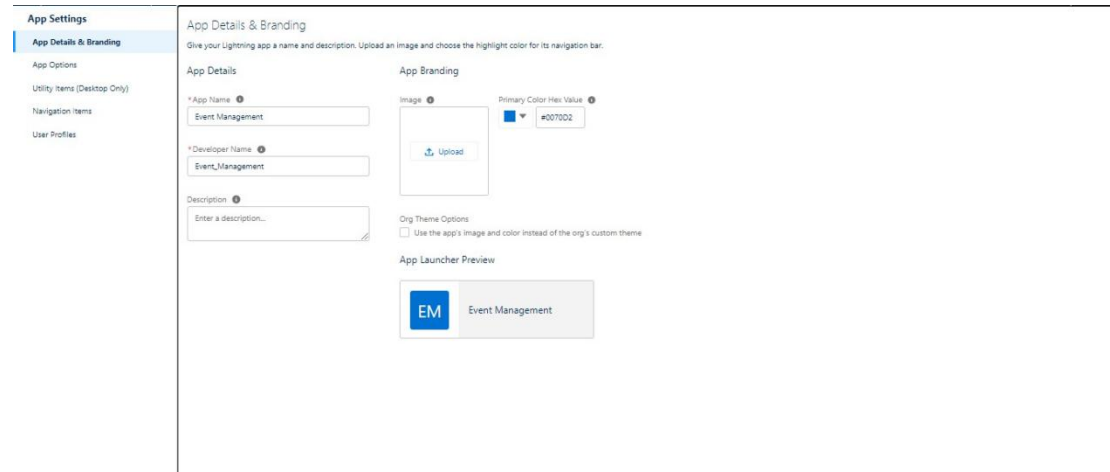
Now create a custom tabs.

- Event Tab,
- Attendee Tab,
- Speaker Tab&
- Vendor Tab



Activity: 4

Create the Event Management Construction app



Activity: 5

Creation of fields:

Now create a Fields.

- Event,
- Attendee,
- Speaker &
- Vendor.

Event fields

Setup

Home

Object Manager

Search Setup

Event

Fields & Relationships

10 Items. Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
City	City__c	Text Area(255)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
End Date	End_Date__c	Date/Time		
enter Id	enter_id__c	Auto Number		
Event Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Phone	Phone__c	Phone		
Start date	Start_date__c	Date/Time		

Attendee fields

Setup

Home

Object Manager

Search Setup

Attendee

Fields & Relationships

7 Items. Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Attendee Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
enter Email	enter_Email__c	Email		
Enter Id	Enter_id__c	Auto Number		
Event Name	Event__c	Master-Detail(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Phone	Phone__c	Phone		

Vendor Fields

Setup

Home

Object Manager

Search Setup

Vendor

Fields & Relationships

8 Items. Sorted by Field Label

Quick Find

New

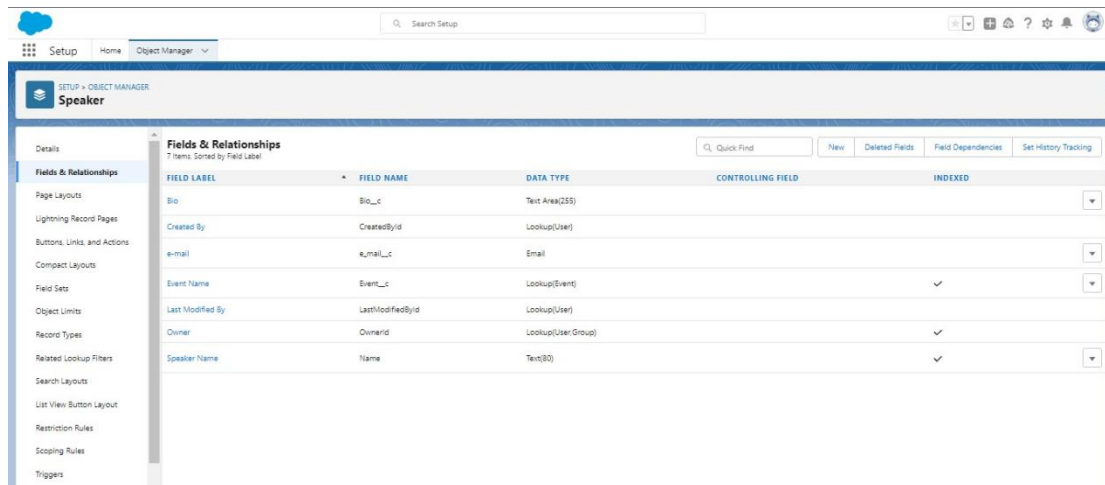
Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
e-mail	e_mail__c	Email		
Event Name	Event_Name__c	Lookup(Event)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Phone	Phone__c	Phone		
Service Provider	Service_Provider__c	Text(100)		
Vendor Name	Name	Text(80)		✓

Speaker Fields



The screenshot shows the 'Fields & Relationships' page for the 'Speaker' object in Salesforce Setup. The left sidebar contains a navigation menu with options like 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, Restriction Rules, Scoping Rules, and Triggers. The main content area displays a table of fields for the 'Speaker' object, sorted by field label. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Bio, Created By, e-mail, Event Name, Last Modified By, Owner, and Speaker Name.

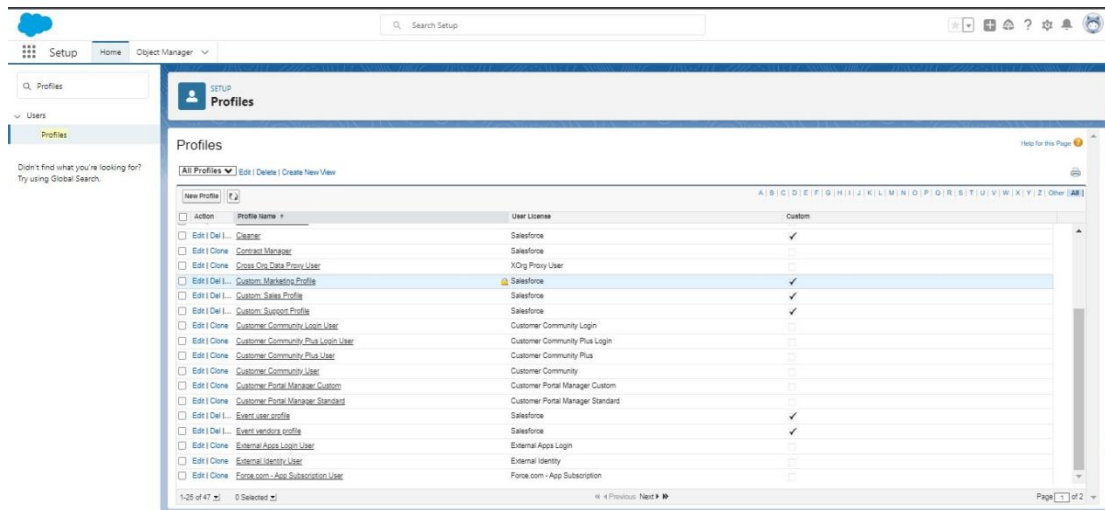
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bio	Bio_c	Text Area(255)		
Created By	CreatedBy	Lookup(User)		
e-mail	e-mail_c	Email		
Event Name	Event_c	Lookup(Event)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Speaker Name	Name	Text(80)		✓

Activity: 6

Creation on profile:

Create a profile with the profile name as,

- Event user profile
- Event vendors profile



The screenshot shows the 'Profiles' page in Salesforce Setup. The left sidebar has a search bar and a 'Users' section with a 'Profiles' link. The main content area displays a table of profiles. The table has columns for Action, Profile Name, User License, and Custom. The profiles listed include various standard and custom profiles, such as 'Custom: Marketing Profile', 'Custom: Sales Profile', 'Custom: Support Profile', 'Customer Community Login User', 'Customer Community Plus Login User', 'Customer Community Plus User', 'Customer Community User', 'Customer Portal Manager: Custom', 'Customer Portal Manager: Standard', 'Event user profile', 'Event vendors profile', 'External Apps Login User', 'External Identity User', and 'Force.com - App Subscription User'.

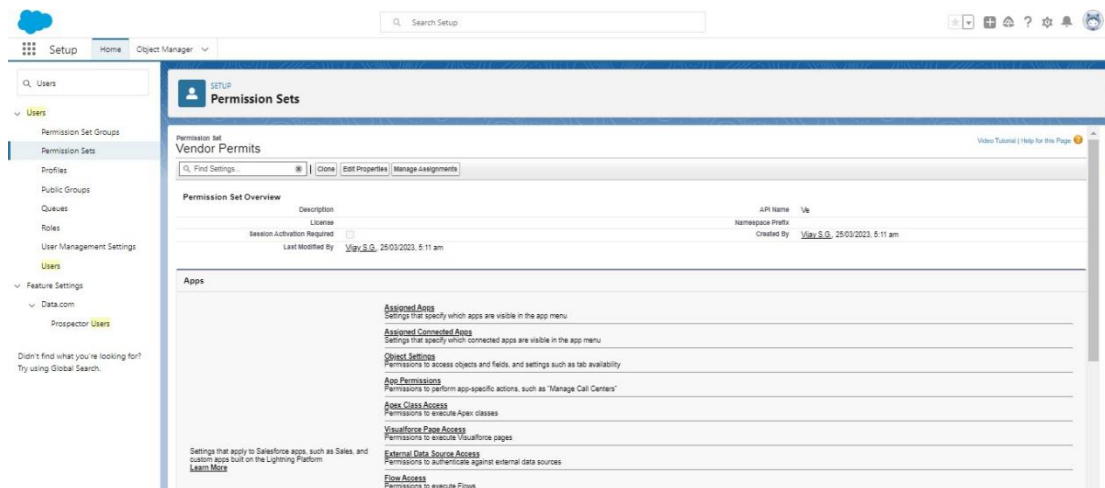
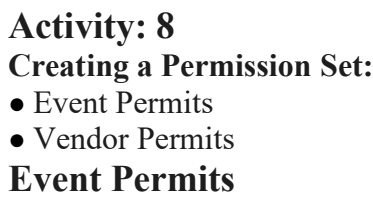
Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Custom: Marketing Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Custom: Sales Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Custom: Support Profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Customer Community Login User	Customer Community Login	
<input type="checkbox"/> Edit Del ...	Customer Community Plus Login User	Customer Community Plus Login	
<input type="checkbox"/> Edit Del ...	Customer Community Plus User	Customer Community Plus	
<input type="checkbox"/> Edit Del ...	Customer Community User	Customer Community	
<input type="checkbox"/> Edit Del ...	Customer Portal Manager: Custom	Customer Portal Manager Custom	
<input type="checkbox"/> Edit Del ...	Customer Portal Manager: Standard	Customer Portal Manager Standard	
<input type="checkbox"/> Edit Del ...	Event user profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	Event vendors profile	Salesforce	✓
<input type="checkbox"/> Edit Del ...	External Apps Login User	External Apps Login	
<input type="checkbox"/> Edit Del ...	External Identity User	External Identity	
<input type="checkbox"/> Edit Del ...	Force.com - App Subscription User	Force.com - App Subscription	

Activity: 7

Creating a User :

Create a user with a username as

- Sanjay Gupta
- Rahul Sharma



Activity: 9 Creating a Report:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Cases by Status		Public Reports	Vijay S.G.	9/4/2023, 1:41 pm	
Created by Me	DB-Adoption: New LEADS Last 30 Days	New leads created in the last 30 Days	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
Private Reports	DB-Adoption: ACCOUNTS w/o Fields Pop	Show me how many accounts do not have key fields populated	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
Public Reports	DB-Adoption: Active User LOGINS	# of Active Users that have logged in the last 14 days	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
All Reports	DB-Adoption: Active USERS	# of Active Users	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
FOLDERS	DB-Adoption: CAMPAIGNS by Status	Status of all campaigns on a monthly basis	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
All Folders	DB-Adoption: CAMPAIGNS Created Last 365	All Campaigns in Salesforce created in the last 365 days	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
Created by Me	DB-Adoption: CAMPAIGNS Last 30 Days	New campaigns created in the last 30 Days	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
Shared with Me	DB-Adoption: CONTACTS w/o Key Fields	Contact WITHOUT key fields are populated	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
FAVORITES	DB-Adoption: Count of ALL ACCOUNTS	Count of all accounts in Salesforce	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
All Favorites	DB-Adoption: Count of ALL CONTACTS	How many contacts are there in Salesforce	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
	DB-Adoption: Count of LEADS	Count of all PROSPECTS/LEADS in Salesforce	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
	DB-Adoption: Count of OPPYS	Count of all opportunities	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
	DB-Adoption: Count of OPPYS last 365	Opportunities Created in the last 365 days	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
	DB-Adoption: Highest # of Activities	Top 5 - Users with the most activities created in the last 30 days	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	
	DB-Adoption: Last Run REPORTS	When is the last time reports were run	DB - Adoption	Vijay S.G.	28/3/2023, 9:40 am	

4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/vjvijay>

Team Member 1 - <https://trailblazer.me/id/tmalai7>

Team Member 2 - <https://trailblazer.me/id/sivak232>

Team Member 3 - <https://trailblazer.me/id/mkumar2890>

5. Advantages

- The benefit of working with a [Salesforce app](#), as opposed to a separate platform, is that all your data will be available in one place.
- Put simply, a native app is one that was built to work within your Salesforce CRM. A non-native app, on the other hand, is built on a third-party platform and must be integrated.
 - ▶ **Guaranteed compatibility**
 - ▶ **Continual data updates**
 - ▶ **Reduced manual data entry**
- However, if you use your Salesforce data to tailor your event-planning tactics, your guests are sure to take notice!
- Salesforce event to-do list when you've segmented your database and come away with relevant insights that can help your event be more strategic, profitable, and guest-specific.
- Use your Salesforce event management app to devise a pricing plan that's customized to your guests and can help you bring in the ticket sales you need
- Luckily, with an event management app that works within Salesforce, you won't have to leave your CRM to manage all the details of your event, big or small.
- Plus, accepting registrations in a variety of formats can help you maximize your event revenue and boost the turnout overall.
 - ▶ **Make online registration mobile-friendly.**
 - ▶ **Allow guests to build their own schedules.**
 - ▶ **Make multi-session sign up intuitive.**

6.Disadvantages

- Check-in-features
- Expanded fund raising tools
- Accommodates Many Event Sizes
- Unconventional Work Hours
- Time Away From Family
- Multiple Event at the same time

7.Applications

- **Native Salesforce Event Management Apps**
- **Integrated Salesforce Event Management Apps**
- **AI-powered Smart Apps**
- **Big Data Analytics**
- **Wearable Technology**

8.Conclusion

In the Salesforce, we create Event management app. Also we created some test data which used to work correctly in Objects, Tabs, Fields, Profiles, Permission Sets, Reports & Dashboards. We have tested the app works well as per the required functions and compatibility. Risk management and timely delivery of high-quality Salesforce releases require testing and test automation. A sophisticated strategy is needed to get it right and context is essential in deciding which option is best. Accept that test automation (and quality) is a continuous process because Salesforce is a very dynamic platform where change is driven by both Salesforce's platform expansion and modifications to meet business objectives.

9.Future Scope

Here are a few of the future advancements that can be made in the application :

- Using Lightning Web Component, and we develop this application in a more efficient way.
- Incorporating a consumer complaint section where people can get help from the authority quickly.
- Adding a social network to the app where people can connect with each other.
- Adding a shipment feature to the application like UPS or FedEx by buying their subscription.

- Providing a platform for the event managers in the city to publish and advertise their events and also sell their products.
- Developers or business owners can also use the community cloud to create this application.