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AN OUTSTANDING ATMOSPHERE TO PLAY HOCKEY!



CASE STUDY: ONE HOCKEY

Event Registration and Players
Integration with Salesforce

PRESENTED BY

CloudSharks

Summary

The One Hockey project aimed to enhance the event registration process and player integration by implementing a series of strategic updates and integrations within Salesforce. The focus was on creating a seamless and efficient system that would benefit both the organization and its users.

Key objectives included:

- Introducing a \$200 referral refund field for out-of-town team referrals.
- Updating missing tournament details in the Registered All Event record sheet.
- Integrating new events using Zapier.
- Optimizing the Event Connect-Salesforce integration for seamless registration synchronization.
- Configuring a Zap for Salesforce-Google Doc sheet sync with duplicate prevention rules.

Challenges

The project faced several challenges that required innovative solutions:

1. **Tracking Referral Refunds:** Adding a new field to track a \$200 refund for teams referring out-of-town teams and integrating this into the All Registration Report.
2. **Updating Tournament Information:** Ensuring all tournament details were accurately updated in the Registered All Event record sheet.
3. **New Event Integration:** Utilizing Zapier to integrate new events into Salesforce efficiently.
4. **Synchronization Optimization:** Enhancing the integration between Event Connect and Salesforce to ensure seamless registration synchronization.
5. **Data Synchronization and Duplication Prevention:** Configuring a Zap to synchronize registration data from Salesforce to a Google Document sheet while preventing data duplication to maintain workflow efficiency.

Solutions Implemented

To address these challenges, the following solutions were implemented:

1. **Referral Refund Field:** A new "Referral Refund" field of \$200 was introduced specifically for out-of-town team referrals. This field was integrated into the All Registration Report, allowing for accurate tracking and reporting of referral refunds.
2. **Tournament Details Update:** Missing tournament details were corrected and updated on the Registered All Event record sheet. This ensured that all event information was complete and accurate, facilitating better event management and reporting.
3. **Zapier Integration for New Events:** Zapier was utilized to seamlessly integrate new events between Event Connect and Salesforce. This automation ensured that new event information was promptly and accurately reflected in Salesforce.
4. **Event Connect-Salesforce Synchronization:** The integration between Event Connect and Salesforce was optimized to streamline the registration process. This enhancement reduced manual data entry, minimized errors, and improved the overall efficiency of the registration system.
5. **Salesforce-Google Doc Synchronization:** A Zap was configured to synchronize registration data from Salesforce to a Google Document sheet. This integration included rules to prevent duplicate entries, ensuring data integrity and improving workflow efficiency.

Challenges

The One Hockey project successfully addressed the challenges of integrating event registration and player data with Salesforce. By implementing strategic updates and leveraging Zapier for seamless integration, the project achieved a more efficient and accurate registration process. The introduction of the referral refund field, updates to tournament details, and enhanced synchronization between platforms contributed to the overall success of the project, providing a robust and streamlined system for managing event registrations and player information.