

Salesforce Project

Smart Event Management System with AI & Automation

Problem Overview

Most event systems only handle registrations and ticketing, lacking intelligence and engagement. Our Smart Event Management System automates the full event lifecycle on Salesforce. It ensures capacity enforcement, QR-based ticketing, and real-time attendance dashboards. AI-driven forecasting predicts turnout and triggers smart reminder campaigns. Gamification encourages attendee participation with points and leaderboards. Post-event automation delivers feedback, thank-you emails, and personalized recommendations.

Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering

- **Event Manager:**
 - Create and manage events with capacity limits.
 - Track registrations and prevent overbooking.
 - View real-time check-in dashboards.
 - Generate reports on attendance and feedback
- **Marketing Team:**
 - Send automated reminders and promotional emails.
 - Segment attendees for targeted campaigns.
 - Track engagement and feedback for future events.
- **Finance Team:**
 - Manage ticket payments and refunds.
 - Generate revenue and expense reports.
 - Ensure secure transactions and compliance.
- **On-site Operations:**
 - Quick check-in via QR code scanning.
 - Monitor live attendance status.
 - Manage walk-in registrations.
- **Attendees:**
 - Register easily for events and sessions.
 - Receive confirmation with QR code ticket.
 - Get personalized session recommendations.
 - Earn points for engagement (gamification).

2. Stakeholder Analysis

- **Primary Stakeholders:**
 - Event Managers
 - Marketing Team
 - Finance Team
 - On-site Operations
 - Attendees
- **Secondary Stakeholders:**
 - Sponsors
 - Speakers
 - Vendors/Partners

3. Business Process Mapping

- **Flow:**
Event Creation → Registration → Ticket & QR Code Generation → Payment → Check-in → Session Attendance → Feedback → Post-event Engagement

4. Industry-Specific Use Case Analysis

- **Problems in Event Management:**
 - Overbooking and poor capacity planning.
 - Low attendee engagement and satisfaction.
 - Manual or slow check-in processes.
 - Lack of personalized attendee experiences.
 - Limited post-event insights and follow-up
- **Salesforce Solutions:**
 - **Capacity Forecasting & Enforcement** → Validation rules + Einstein Analytics
 - **QR Code Check-in** → Apex + Salesforce Mobile App for real-time scanning
 - **Personalized Recommendations** → Recommendation Engine using Apex/AI
 - **Gamification** → Custom Object + Apex logic + Leaderboard dashboards
 - **Post-Event Automation** → Flows + Email templates for follow-ups

Phase 2:Salesforce Org Setup & Configuration

This phase covers the foundational setup of the Salesforce org, including company information, user management, profiles, roles, permission sets, sharing rules, security policies, and sandbox strategy. The configurations were implemented in a Salesforce Developer Edition org for demo purposes.

1. Salesforce Edition & Developer Org

- **Edition used:** Developer Edition (free) for building and demonstrating features.
- **Reason:** Developer Edition provides core functionality including custom objects, apps, and limited sandbox access.
- **Notes:** For production deployments, Enterprise or Unlimited editions are recommended for advanced sharing, reports, and full sandbox usage.

2. Company Profile / Company Information

Setup: [Setup](#) → [Company Information](#) → [Edit](#)

Field	Value
Company Name	EventCorp Pvt Ltd
Default Language	English (India)
Default Time Zone	(GMT+05:30) Kolkata
Default Locale	English (India)
Default Currency	INR
Primary Contact Email	admin@eventcorp.com
Address	As appropriate

Notes: Timezone, currency, and locale affect reports, business hours, and org behavior

orgfarm-7067afe983-dev-ed.develop.lightning.force.com/lightning/setup/CompanyProfileInfo/home

Setup Home Object Manager

Search Setup

Company Information

Company Information
EventCorp Pvt Ltd

The organization's profile is below.

User Licenses (10+) | Permission Set Licenses (10+) | Feature Licenses (11) | Usage-based Entitlements (10+)

Organization Detail

Organization Name: EventCorp Pvt Ltd
Primary Contact: admin@eventcorp.com
Division: Hyderabad
Address: India
Fiscal Year Starts In: April
Activate Multiple Currencies: ☒
Enable Data Translation: ☐
Newsletter: ☒
Admin Newsletter: ☒
Hide Notices About System Maintenance: ☐
Hide Notices About System Downtime: ☐
Locale Formats: ICU

Phone:
Fax:
Default Locale: English (United States)
Default Language: English
Default Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
Corporate Currency: Indian Rupee
Used Data Space: 364 KB (7%) [View]
Used File Space: 17 KB (0%) [View]
API Requests, Last 24 Hours: 0 (15,000 max)
Streaming API Events, Last 24 Hours: 0 (10,000 max)
Restricted Logins, Current Month: 0 (0 max)
Salesforce.com Organization ID: 00Dgl000007qDTN
Organization Edition: Developer Edition
Instance: CAN98

Created By: OrgFarm EPIC, 7/24/2025, 9:48 AM
Modified By: Alekhya Kaki, 9/22/2025, 5:06 AM

3. My Domain

Setup: Setup → Quick Find → My Domain

- Subdomain registered, provisioned, and deployed to users.
- **Purpose:** Ensures unique org URL, supports SSO and custom login pages.

4. Business Hours & Holidays

Setup:

- Setup → Quick Find → Business Hours → New
- Setup → Quick Find → Holidays → New

Business Hours:

Name	Timezone	Mon–Fri	Sat/Sun
EventCorp - India Hours	Kolkata	09:30–18:30	Closed

Holidays:

- Republic Day — 2026-01-26

- Independence Day — 2026-08-15
- Company Offsite — 2025-12-18

The screenshot shows the Salesforce Setup interface for configuring Business Hours. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled 'Business Hours' and includes a search bar. Below the title, there is a section for 'Organization Business Hours' with instructions on how to set business hours. A table shows the current business hours for 'EventCorp - India Hours' across the days of the week. The table indicates that the organization is active and was created by 'Alekhya Kati' on 9/22/2025 at 3:19 AM. Below the table, there is a 'Holidays' section with a table listing holidays such as Christmas, Company offsite, and Republic day.

Business Hours Name	EventCorp - India Hours	Time Zone																
Business Hours	<table border="1"> <thead> <tr> <th>Day</th> <th>Hours</th> </tr> </thead> <tbody> <tr> <td>Sunday</td> <td>No Hours</td> </tr> <tr> <td>Monday</td> <td>9:00 AM to 6:30 PM</td> </tr> <tr> <td>Tuesday</td> <td>9:00 AM to 6:30 PM</td> </tr> <tr> <td>Wednesday</td> <td>9:00 AM to 6:30 PM</td> </tr> <tr> <td>Thursday</td> <td>9:00 AM to 6:30 PM</td> </tr> <tr> <td>Friday</td> <td>9:00 AM to 6:30 PM</td> </tr> <tr> <td>Saturday</td> <td>No Hours</td> </tr> </tbody> </table>	Day	Hours	Sunday	No Hours	Monday	9:00 AM to 6:30 PM	Tuesday	9:00 AM to 6:30 PM	Wednesday	9:00 AM to 6:30 PM	Thursday	9:00 AM to 6:30 PM	Friday	9:00 AM to 6:30 PM	Saturday	No Hours	(GMT+05:30) India Standard Time (Asia/Kolkata)
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Friday	9:00 AM to 6:30 PM																	
Saturday	No Hours																	

Holiday Name	Description	Date and Time
Christmas		12/25/2025 All Day
Company offsite		12/18/2025 All Day
Diwali		10/20/2025 All Day
Republic day		1/26/2026 All Day

5. Fiscal Year

Setup: Setup → Quick Find → Fiscal Year

- Standard fiscal year starting April (common in India).

6. Users

Setup: Setup → Quick Find → Users → Add Multiple Users

7. Profiles

Setup: Setup → Profiles → Clone Standard Profile → Rename

Event Manager Profile

- Event__c: Create, Read, Edit, Delete
- Session__c: Create, Read, Edit, Delete
- Registration__c: Read, Edit
- Feedback__c: Read, Edit, Delete
- App Visibility: Event Management App
- System Permissions: Run Reports

Event Coordinator Profile

- Event__c: Read, Edit
- Registration__c: Create, Read, Edit
- Feedback__c: Read

Attendee (Community) Profile

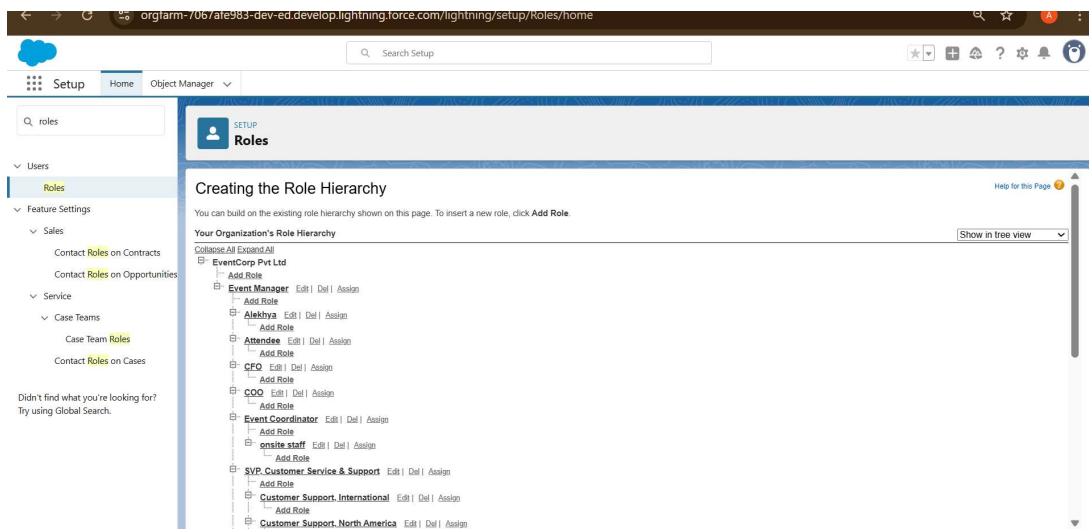
- Event__c: Read
- Registration__c: Create (own), Read (own)

8. Roles & Role Hierarchy

Setup: [Setup](#) → [Roles](#) → [Set Up Roles](#)

Suggested hierarchy:

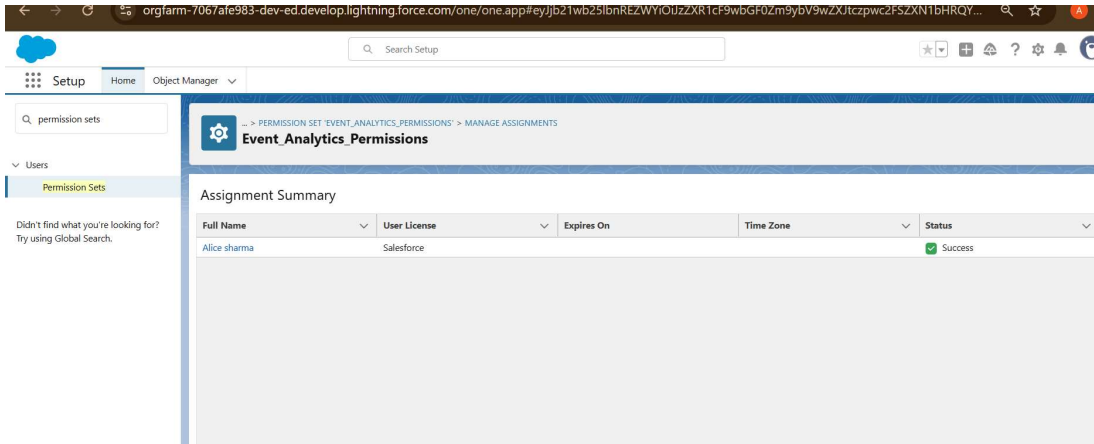
- CEO / Org Owner
- Head of Events
- Event Director
- Event Manager
- Event Coordinator
- Onsite Staff



9. Permission Sets

Setup: Setup → Permission Sets → New

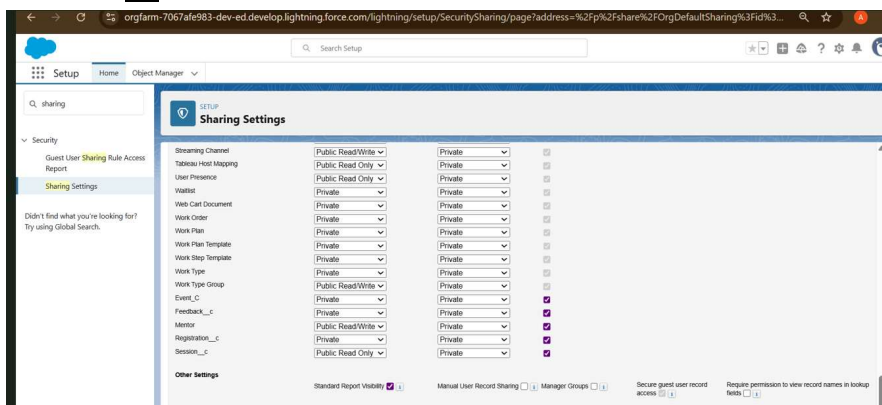
Permission Set	Users Assigned	Key Permissions
QR_Scanner_Permissions	Onsite Scanner	Registration__c: Read/Write, Mobile App access
Event_Analytics_Permissions	Event Manager, Event Director	Reports/Dashboards, Analytics App



10. Organization-Wide Defaults (OWD) & Sharing Rules

Setup: Setup → Sharing Settings → Edit

Object	OWD
Event__c	Private
Registration__c	Private
Session__c	Public Read Only
Feedback__c	Private



11. Login & Security Policies

- Session timeout: 2 hours (internal), 30 mins (community)
- Login IP Ranges: restricted by profile where applicable
- Login Hours: restricted for contractors/attendees
- Two-Factor Authentication: enabled for Admin and Event Managers