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

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

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
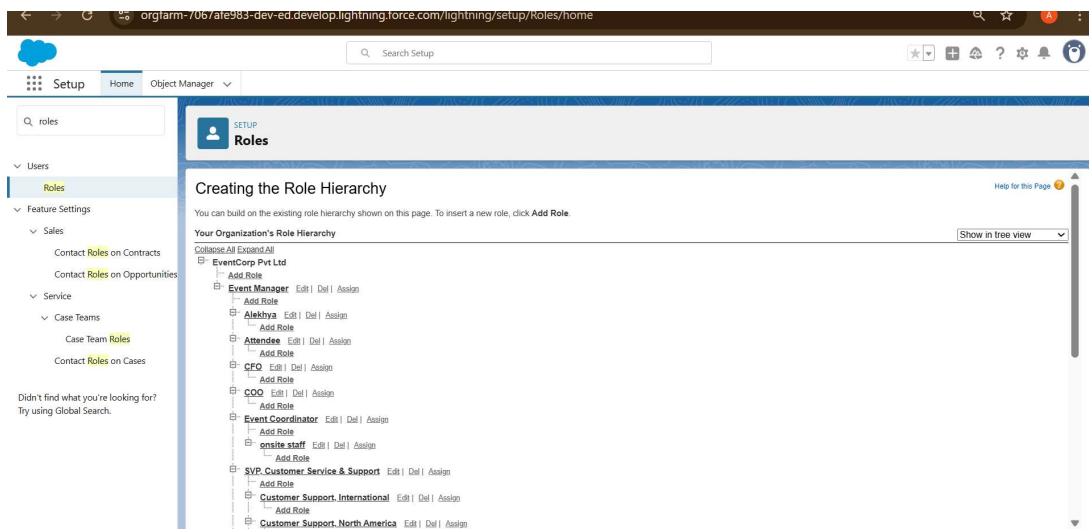
- Feedback__c: Read

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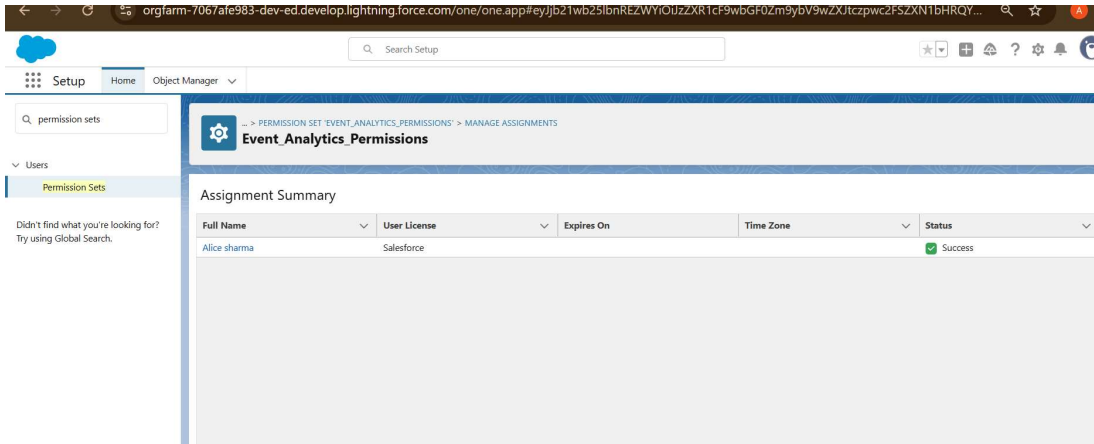
10. Organization-Wide Defaults (OWD) & Sharing Rules

Setup: Setup → Sharing Settings → Edit

Object	OWD
Event__c	Private
Registration__c	Private
Session__c	Public Read Only
Feedback__c	Private
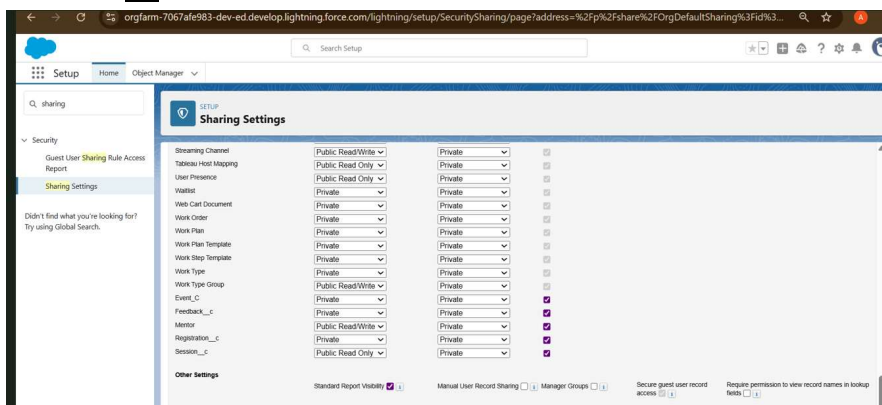
11. Login & Security Policies

- 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