

- **Smart Event Management & Ticketing System**

- **Problem Statement**

Event organizers face multiple challenges:

- Ticket sales are fragmented across different channels (online, offline, sponsors).
- No centralized system to manage seat allocation, VIP access, cancellations, and refunds.
- Sponsors don't get proper visibility into performance .
- Attendees lack a smooth digital experience (QR tickets, real-time updates, group discounts).

To solve this, we want a system to:

- Centralize event, ticket, and sponsor management.
- Automate approval workflows for VIP tickets and cancellations.
- Enable digital payments and QR-based entry passes.
- Provide real-time dashboards for ticket sales, sponsorship revenue, and attendee engagement.

## **Phase 1: Problem Understanding & Industry Analysis**

### **1 Requirement Gathering**

- Capture event details (type, date, location, capacity).
- Manage ticket categories (General, VIP, Early Bird, Group Discounts).
- Automate seat allocation and group bookings.
- Track sponsorship deals and benefits.
- Send digital tickets/QR codes to attendees.
- Enable refunds and cancellations with approval workflows.
- Provide dashboards for ticket sales, revenue, and attendance.

### **2 Stakeholder Analysis**

- Event Organizers: Need event setup, sponsor management, ticket monitoring.
- Attendees: Need smooth booking, payments, QR entry, and refund options.
- Sponsors: Need visibility into event reach audience size, and engagement.
- Administrators (CRM Managers): Ensure secure access, data integrity, and reporting.

### **3 Business Process Mapping**

#### **Current:**

- Tickets sold via third-party sites or offline.
- Manual sponsor agreement tracking.
- Attendees face delays in receiving confirmation.
- No unified dashboard for revenue analysis.

#### **Proposed:**

- Centralized Event, Ticket, Sponsor objects.
- Automated VIP approvals and refund workflows.
- QR-code ticketing + calendar sync for attendees.
- Dashboards for organizers & sponsors to track revenue, seats, and engagement.

## 4 Industry-specific Use Case Analysis

- Concerts & Music Festivals → VIP, General, Early Bird ticketing.
- Corporate Conferences → Multi-track event scheduling, sponsor branding.
- Sports Events → Seat allocation and bulk ticket sales.
- Weddings & Private Events → Guest management with QR invitations.

## 5 AppExchange Exploration


- Explore apps for payment gateways (Razorpay).
- Explore apps for QR code generation.
- Check Event Management accelerators available on AppExchange and customize instead of reinventing everything.

## Phase 2: Org Setup & Configuration

- This phase focused on setting up and configuring the Salesforce Developer Org for the Smart Event Management Project. The goal was to establish a solid foundation for the CRM system, ensuring proper organizational structure, security, and access controls. The configuration was carried out entirely using Salesforce’s declarative (point-and-click) tools without coding.

### Steps Completed in Phase 2:

#### 1. Company Profile Setup

 **SETUP**

**Company Information**

Company Information

Smart Event Management CRM

[Help for this](#)

The organization's profile is below.

[User Licenses \(10+\)](#) | [Permission Set Licenses \(10+\)](#) | [Feature Licenses \(11\)](#) | [Usage-based Entitlements \(10+\)](#)


**Organization Detail**

[Edit](#)

Organization Name	Smart Event Management CRM	Phone	
Primary Contact	OrgFarm EPIC	Fax	
Division		Default Locale	English (United States)
Address	India	Default Language	English
Fiscal Year Starts In	January	Default Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (India) - INR
Enable Data Translation	<input type="checkbox"/>	Used Data Space	342 KB (7%) <a href="#">View</a>
Newsletter	<input checked="" type="checkbox"/>	Used File Space	17 KB (0%) <a href="#">View</a>
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	14 (15,000 max)
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)
Locale Formats	ICU	Salesforce.com Organization ID	00DgL00000BeZWN
		Organization Edition	Developer Edition
		Instance	CAN98

- Configured company information, business hours, and holidays.

#### 2. Business Hours

 **SETUP**

**Business Hours**

Organization Business Hours

[Help for this](#)

Select the days and hours that your support team is available. These hours, when associated with escalation rules, determine the times at which cases can escalate.

If you enter blank business hours for a day, that means your organization does not operate on that day.

[Holidays \(0\)](#)

**Business Hours Detail**

[Edit](#)

Business Hours Name	Smart Event Default Hours	Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)														
Business Hours	<table><tr><td>Sunday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Monday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Tuesday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Wednesday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Thursday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Friday</td><td>9:00 AM to 6:00 PM</td></tr><tr><td>Saturday</td><td>9:00 AM to 6:00 PM</td></tr></table>	Sunday	9:00 AM to 6:00 PM	Monday	9:00 AM to 6:00 PM	Tuesday	9:00 AM to 6:00 PM	Wednesday	9:00 AM to 6:00 PM	Thursday	9:00 AM to 6:00 PM	Friday	9:00 AM to 6:00 PM	Saturday	9:00 AM to 6:00 PM	Default Business Hours	<input checked="" type="checkbox"/>
Sunday	9:00 AM to 6:00 PM																
Monday	9:00 AM to 6:00 PM																
Tuesday	9:00 AM to 6:00 PM																
Wednesday	9:00 AM to 6:00 PM																
Thursday	9:00 AM to 6:00 PM																
Friday	9:00 AM to 6:00 PM																
Saturday	9:00 AM to 6:00 PM																
Active	<input checked="" type="checkbox"/>																
Created By	Samhitha.M.C 9/17/2025, 4:36 AM	Last Modified By	Samhitha.M.C 9/17/2025, 4:36 AM														

[Edit](#)

3. Holidays

SETUP

Holidays

Holiday Detail

Holidays are dates and times at which business hours are suspended. These dates and times, when associated with business hours, suspend business hours and escalation rules during the holidays.

Add or remove business hours to holidays to suspend business hours and escalation rules during the holidays.

[Business Hours \[0\]](#)

Holiday Detail

Edit

Delete

Holiday Name	NEW YEAR
Description	
Date and Time	1/1/2026 All Day
Recurring Holiday	Occurs every January 1 effective 1/1/2026
Created By	Samhitha M C 9/17/2025, 4:48 AM

4. User Setup

- Created multiple users with different roles (Event Manager, Sponsor, Attendee).

SETUP

Users

User Edit  
John Event Manager

User Edit

Save

Save & New

Cancel

General Information

First Name

John

Last Name

Event Manager

Alias

jeven

Email

johneventmanager@gmail

Username

johneventmanager@smarte

Nickname

User175819948553334175

Title

Company

Department

Role

Event Manager

User License

Salesforce

Profile

Standard User

Active

☒

Marketing User

☐

Offline User

☐

Knowledge User

☐

Flow User

☐

Service Cloud User

☐

i. Event Manager

SETUP

Users

User Edit  
Sarah Sponsor

User Edit

Save

Save & New

Cancel

General Information

First Name

Sarah

Last Name

Sponsor

Alias

spon

Email

sam+smarteentsponsor@h

Username

sam+sponsor@smarteent

Nickname

User175819973517988547

Title

Company

Department

Role

Sponsor

User License

Salesforce

Profile

Standard User

Active

☒

Marketing User

☐

Offline User

☐

Knowledge User

☐

ii. Sponsor

SETUP

Users

User Edit  
David Attendee

User Edit

Save

Save & New

Cancel

General Information

First Name

David

Last Name

Attendee

Alias

datte

Email

sam+attendee@gmail.com

Username

attendee@smarteent.com

Nickname

User175819995070990819

Title

Company

Department

Division

Role

Attendee

User License

Salesforce Platform

Profile

Standard Platform User

Active

☒

Marketing User

☐

Offline User

☐

Knowledge User

☐

Flow User

☐

Service Cloud User

☐

Site.com Contributor User

☐

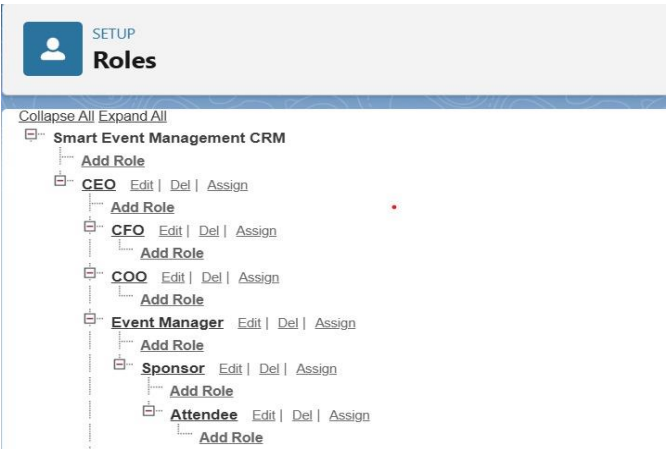
Site.com Publisher User

☐

iii. Attendee

5. Roles

- Defined role hierarchy to manage data visibility across the organization.



6. Profiles


- Created and customized profiles by cloning standard profiles and adjusting object-level permissions.

The screenshot shows the 'Profiles' setup page in Salesforce. At the top, there's a 'SETUP' header with a user icon and the title 'Profiles'. Below this, there's a 'Profile' section with the title 'Event Manager Profile'. A description states: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one.' Below the description, there are links for 'Login IP Ranges [0]', 'Enabled Apex Class Access [0]', 'Enabled Visualforce Page Access [0]', 'Enabled External Credential Principal Access [0]', 'Enabled Custom Metadata Type Access [0]', 'Enabled Custom Setting Definition [0]', and 'Enabled Custom Permissions [0]'. Below these links, there's a 'Profile Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. The 'Profile Detail' section contains a table with the following information: Name: Event Manager Profile, User License: Salesforce, Description: , and Created By: Samhitha M.C, 9/19/2025, 9:04 PM.

iv. Event Manager Profile

The screenshot shows the 'Profiles' setup page in Salesforce. At the top, there's a 'SETUP' header with a user icon and the title 'Profiles'. Below this, there's a 'Profile' section with the title 'Sponsor Profile'. A description states: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one.' Below the description, there are links for 'Login IP Ranges [0]', 'Enabled Apex Class Access [0]', 'Enabled Visualforce Page Access [0]', 'Enabled External Credential Principal Access [0]', 'Enabled Custom Metadata Type Access [0]', 'Enabled Custom Setting Definition [0]', and 'Enabled Custom Permissions [0]'. Below these links, there's a 'Profile Detail' section with buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. The 'Profile Detail' section contains a table with the following information: Name: Sponsor Profile, User License: Salesforce, Description: , and Created By: Samhitha M.C, 9/19/2025, 9:12 PM.

v. Sponsor Profile



SETUP

Profiles

Profile

Attendee Profile

Users with this profile have the permissions and page layouts listed below. Administrators can cha

If your organization uses Record Types, use the Edit links in the Record Type Settings section bel

[Login IP Ranges \[0\]](#) | 
 [Enabled Apex Class Access \[0\]](#) | 
 [Enabled Visualforce Page Acces](#)  
[Enabled External Credential Principal Access \[0\]](#) | 
 [Enabled Custom Metadata Type Access \[0\]](#) | 
 [Enabled Cu](#)  
[Enabled Custom](#)

Profile Detail

Edit

Clone

Delete


View Users

Name	Attendee Profile
User License	Salesforce
Description	
Created By	Samhitha M.C, 9/19/2025, 9:13 PM

vi. Attendee Profile

## 7. Login Access Policies

- Enabled admin login access for troubleshooting and testing.



SETUP

Login Access Policies

Login Access Policies

Control which support organizations your users can grant login access to.

Changes Saved

Manage Support Options

Save

Cancel

Setting	Enabled
Administrators Can Log in as Any User	<input checked="" type="checkbox"/>


Support Organization	Packages	Available to Users	Available to Administrators Only <a href="#">i</a>
Salesforce.com Support		<input checked="" type="radio"/>	<input type="radio"/>

Save

Cancel

## 8. Sharing Rules

- Created exceptions to OWD (e.g., Event Manager access to Attendees, Sponsors, and Tickets).



SETUP

Sharing Settings

No sharing rules specified.

Work Type Group Sharing Rules

New

Recalculate

Work Type Group Sharing Rules Help [?](#)

No sharing rules specified.

Attendee Sharing Rules

New

Recalculate

Attendee Sharing Rules Help [?](#)

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in Role: Attendee	Role: Event Manager	Read Only

New

Recalculate

Event Sharing Rules Help [?](#)

No sharing rules specified.

Sponsor Sharing Rules

New

Recalculate

Sponsor Sharing Rules Help [?](#)

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in Role: Sponsor	Role: Event Manager	Read/Write

New

Recalculate

Ticket Sharing Rules Help [?](#)

Ticket Sharing Rules

New

Recalculate

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in Role: Attendee	Role: Event Manager	Read Only

9. Organization wide Defaults(OWD)

- Configured baseline record access (Event = Public Read Only, Attendee/Sponsor/Ticket = Private).

Attendee	Private	Private	✓
Event	Public Read Only	Public Read Only	✓
Sponsor	Private	Private	✓

10. Permission Sets

- Assigned extra permissions without modifying base profiles.

Custom Object Permissions									
	Basic Access				Data Administration				
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields		
Attendees	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Events	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

	Basic Access				Data Administration				
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields		
Sponsors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		