

Event Management MAX FIT - Phase 2 Development

Problem Statement

While Phase 1 established a strong data foundation, the system currently lacks automation, streamlined processes, and user-friendly interfaces. Event organizers still need to manually update seat counts, change event statuses, and handle attendee communications. This creates delays, potential errors, and inefficiencies. Phase 2 aims to solve these issues by introducing automation, approval workflows, and improved user interfaces, ensuring efficient event operations and a better user experience.

Overview

Phase 2 builds upon the foundational data model and security structure created in Phase 1. The focus is on implementing automation, process optimization, and user interface enhancements. This ensures efficient event operations, streamlined workflows, and improved user experience for organizers, attendees, and speakers.

Phase 2 Components

1. Automation with Salesforce Flows & Processes

- Event Capacity Management: • Auto-update Remaining Seats when Attendees register or cancel.
- Prevent new Attendee record creation if seats are full.
- Event Status Updates: • Automatically update Event Status from Created → Published → In Progress → Completed based on Start/End DateTime.
- Recurring Event Automation: • When "Recurring?" is checked, automatically generate related Events based on Frequency (Weekly/Monthly).
- Email Alerts & Notifications: • Send confirmation emails to Attendees upon registration.
- Notify Organizers when seat capacity reaches 80%.
- Send reminders to Speakers one day before the event.

2. Approval Processes

- Event Publishing Approval: • New Events require approval before status changes to "Published."
- Approval routed to CEO or designated approver role.
- Speaker Confirmation: • Speakers must confirm availability before being added to Published Events.

3. User Interface Enhancements

- Lightning Record Pages: • Event page with tabs for Attendees, Speakers, and related lists.
- Quick Actions: Register Attendee, Add Speaker, Publish Event.
- Dynamic Forms & Layouts: • Show/Hide fields based on conditions (e.g., Frequency field visible only if Recurring = true).
- List Views & Reports: • Event Attendance Report (Registered vs. Remaining Seats).
- Speaker Engagement Report (Speakers assigned across events).
- Attendee Participation Report (Events attended per attendee).

4. Integration Preparation

- Email-to-Salesforce for Attendee queries. - Calendar Sync (Outlook/Google) to push Event schedules (future phase integration).

Deliverables for Phase 2

- Automated Flows for seat management, status updates, and notifications. - Approval processes for publishing events and confirming speakers. - Configured Lightning Record Pages with dynamic layouts. - Standard & custom Reports and Dashboards. - Documentation of automation, approvals, and UI enhancements.

Importance of Phase 2

Phase 2 transforms the static data model into an interactive, automated event management system. By automating capacity management, streamlining approvals, and improving the UI, users gain efficiency, accuracy, and visibility. This phase prepares the system for future integrations and advanced Apex/Lightning development in Phase 3.