

Event Management MAX FIT - Phase 1 Development

Problem Statement

Event management processes often suffer from data inconsistencies, duplicate records, and lack of structured access control. Without a proper system, organizers face difficulties in validating event details, ensuring accurate attendee/speaker information, and maintaining secure access to records. This leads to inefficiencies, poor collaboration, and risks of errors in event operations. The problem is to design a Salesforce-based solution that ensures clean data capture, duplicate prevention, and a secure access model to support smooth event management operations.

Overview

Phase 1 establishes the foundation of the system by creating the necessary Salesforce data model, enforcing data integrity and validation, preventing duplicates, and setting up the security/access control structure. This phase ensures clean and secure data collection for event management operations.

Phase 1 Components

1. Object Structure Setup

Create custom Salesforce objects representing core entities such as: - Location with attributes like Address, City, State, Country, Verified Checkbox. - Event Organizer tracking organizer details including emails, phone numbers, and linked address. - Event with fields such as Auto Number for ID, Name, Status, Start and End DateTime, Max Seats, Remaining Seats (formula), Location, Event Type, Recurring, Frequency. - Attendee recording participants with fields like Name, Email, Phone, Company, Address. - Speaker capturing speaker details associated with events. - Junction objects for many-to-many relationships (Event-Attendee, Event-Speaker). Each field must have a valid data type and description/help text.

2. Validation Rules

Validation rules enforce business constraints: - If 'Recurring?' checkbox is selected, 'Frequency' is mandatory. - If Event Type = Virtual, Location not selectable; if In-Person, Location required. - End DateTime must be at least one day after Start DateTime. - Attendees can only join live Events (End Date in future, Live checkbox true, Seats available). - Speakers can only be linked to live Events.

3. Duplicate Rules Setup

Duplicate prevention rules: - Speaker: prevent duplicates by Email and Phone. - Attendee: prevent duplicates by Name, Email, and Phone. - Event Organizer: prevent duplicates by Email and Phone.

4. Security Model (Profiles, Roles, Sharing)

Salesforce security setup: - Profiles: Event Organizer, Event Attendee, Speaker (object-level and field permissions). - Roles: CEO top-level, then Organizer, Attendee, Speaker. Organizers can manage Speakers and Attendees. - OWD: Event Public Read Only, Speaker Private. - Sharing Rules: Share Speaker and Attendee records with Organizers (Read/Edit). - Field-level security for sensitive data.

Deliverables for Phase 1

- Salesforce objects and fields deployed per data model. - Validation rules ensuring data integrity. - Duplicate rules implemented. - Profiles and roles created per least privilege principle. - Sharing rules configured. - Documentation of schema, validation, and security settings.

Importance of Phase 1

Phase 1 lays the groundwork for the application by ensuring clean, valid, and secure data. It reduces errors in automation and ensures a controlled environment for event management. Later phases build with Apex, Lightning, and integrations.