

salesforce

Event App

Salesforce Labs Event App v5.0
AppExchange Pkg

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New Features

Salesforce Labs Event App v5.0

Event App - New Features

Improvement Areas



**REGISTRATION
MANAGEMENT**



**EVENT
MANAGEMENT**



**USEABILITY
ENHANCEMENTS**

Event App - New Features

Improvement Areas



**REGISTRATION
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Support Registration of Leads

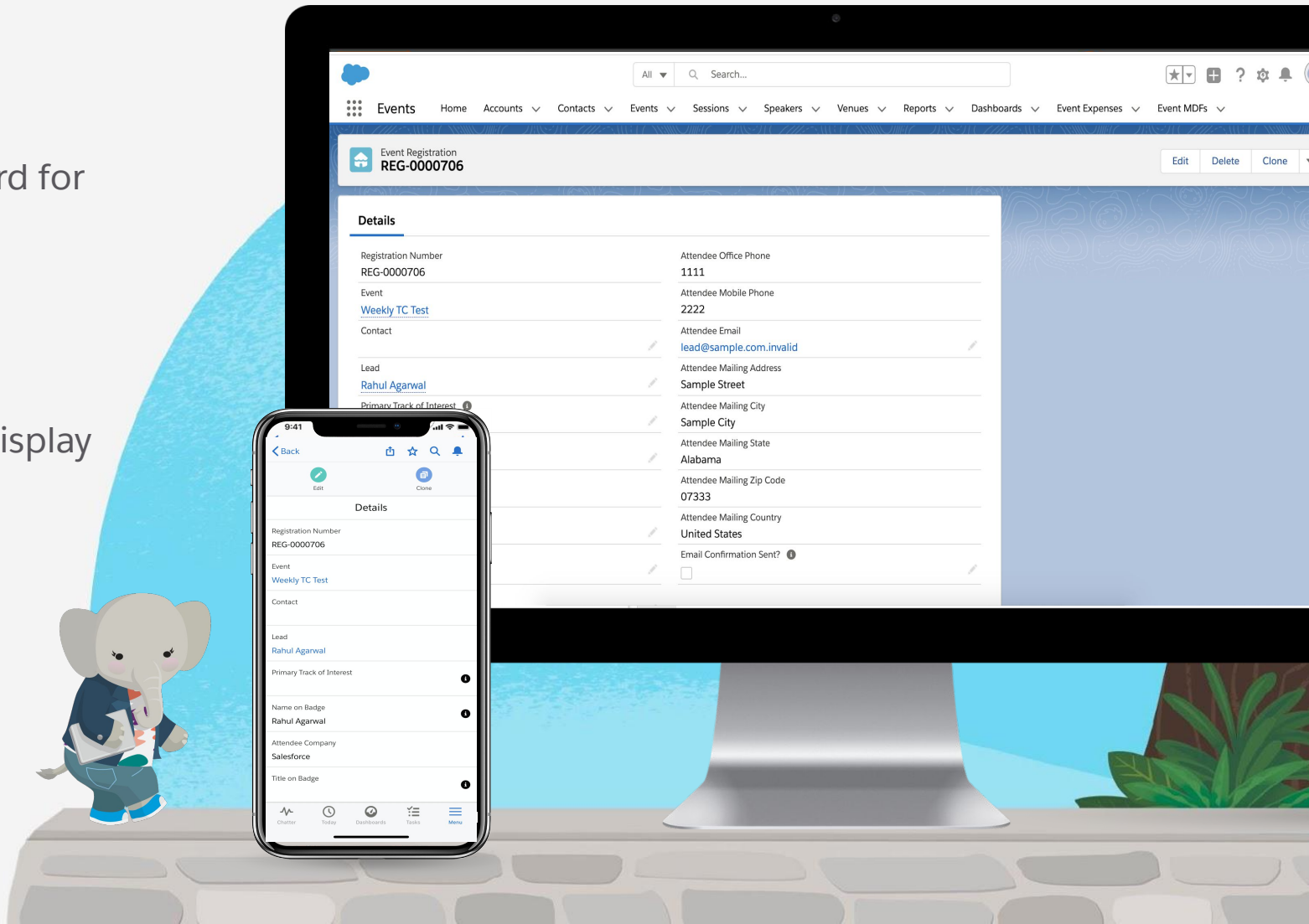
Enable users to register leads to events

Register Lead or Contact

Able to select either a lead or a contact record for the event registration

See Registrant Details

Irrespective of lead or contact, same fields display the registrant details



Register Attendee from Contact or Lead Record*

Register contact/lead to an event directly from their record page

‘Register for Event’ Button

A custom action on lead/contact record launches a wizard (flow) to register an individual for an event

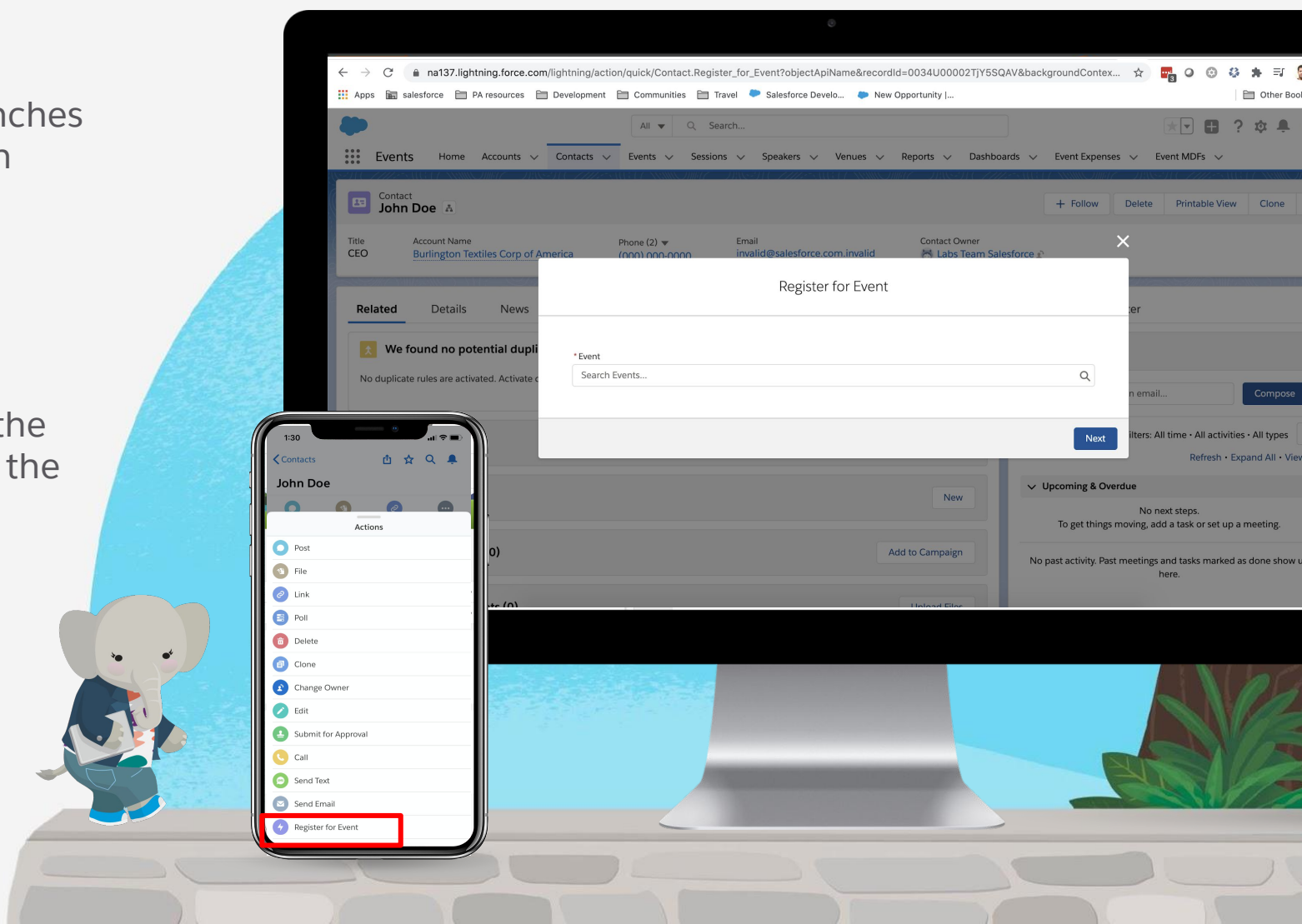
Pre-populated Data

Most of the data is pre-populated based on the contact, lead and event selected minimizing the need for manual data entry

Supports Scheduling Reminder

Allows configuring when to send a reminder email for the registration

* Lightning Required



Schedule Reminder Emails

Enables users to schedule a reminder email to be sent for an upcoming event

Configurable per Registration

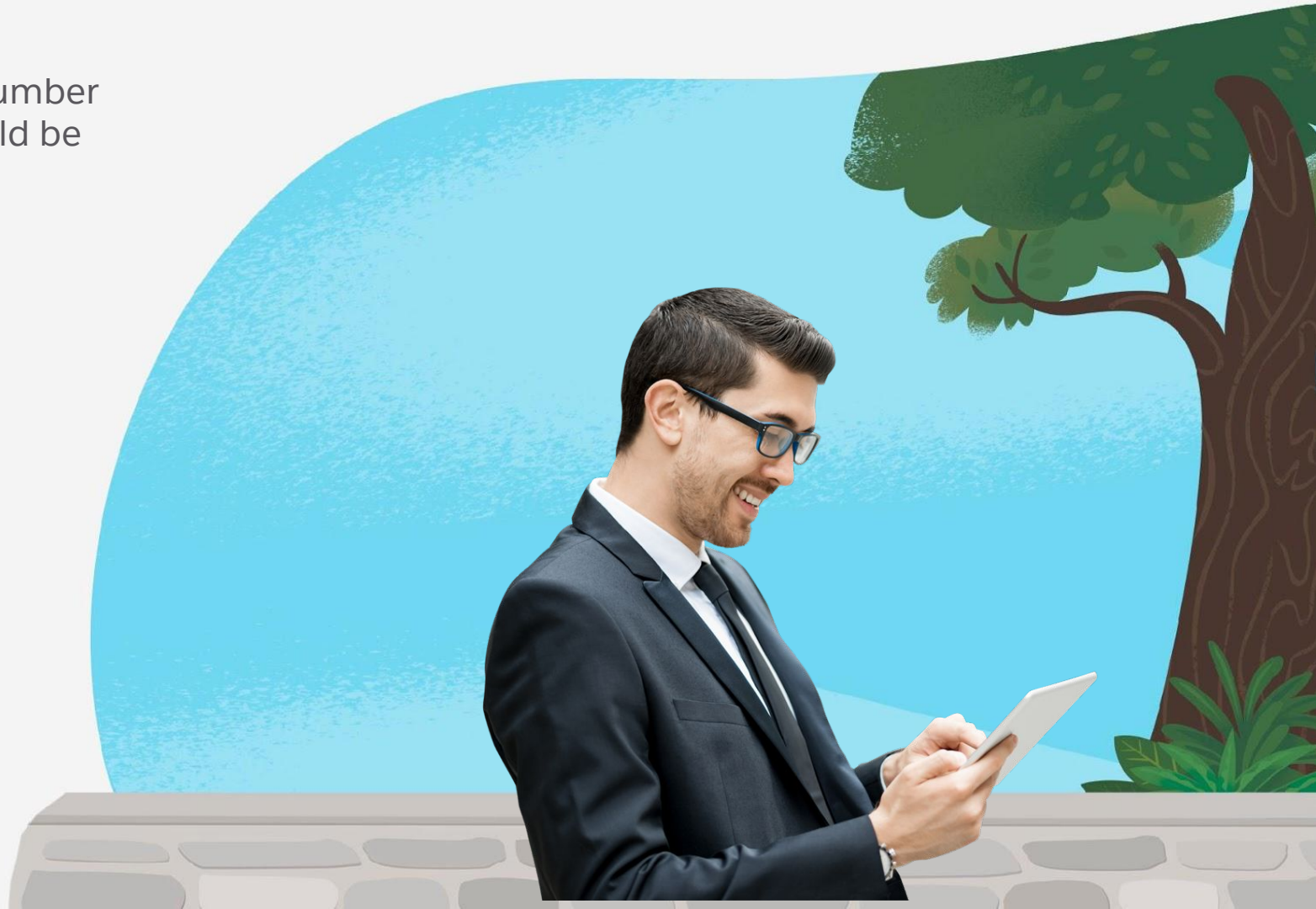
When registering an attendee, specify the number of days prior to the event the reminder should be sent out.

Specify the number of days

Choose 1-99 days ahead

Customize the Reminder Message

Ability to modify the message via an email template



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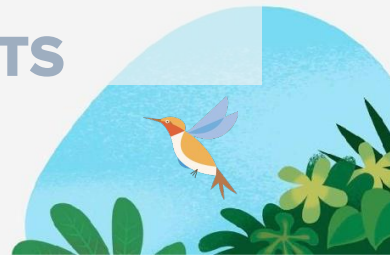
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Create Recurring Events

Easily setup recurring events during initial event creation

Choose Frequency

- Daily
- Weekdays Only
- Weekly
- Monthly

Specify Recurrence End Date

The date the last event should be setup for.

Create over 200+ recurring events from a single event.

A desktop monitor and a smartphone displaying the 'New Event' form. The desktop screen shows the full form with fields for Event Name, Region, Event Type, Event Manager, Event Start Date, Event End Date, Recurrence, and Recurrence End Date. The smartphone shows a mobile version of the same form.

New Event

Information

* Event Name ↶
Weekly Recruiting Event

Region
--None--

Event Type
--None--

Event Manager
Search People... 🔍

* Event Start Date ↶
Date: 1/5/2021 📅 Time: 12:00 PM 🕒

* Event End Date ↶
Date: 1/5/2021 📅 Time: 1:00 PM 🕒

Recurrence 🔔 ↶
Weekly

Recurrence End Date 🔔 ↶
2/26/2021 📅

Cancel New Event Save

Information 🔔

* Event Name
Mobile Weekly

Region
--None--

Event Type
--None--

Send Email Confirmation 🔔
☐

Parent Event 🔍

Event Manager 🔍

* Event Start Date
Jan 5, 2021 at 4:30 PM

* Event End Date
Jan 5, 2021 at 5:30 PM

Recurrence 🔔
Weekly

Recurrence End Date 🔔
Dec 4, 2021

Customize Confirmation & Reminder Emails

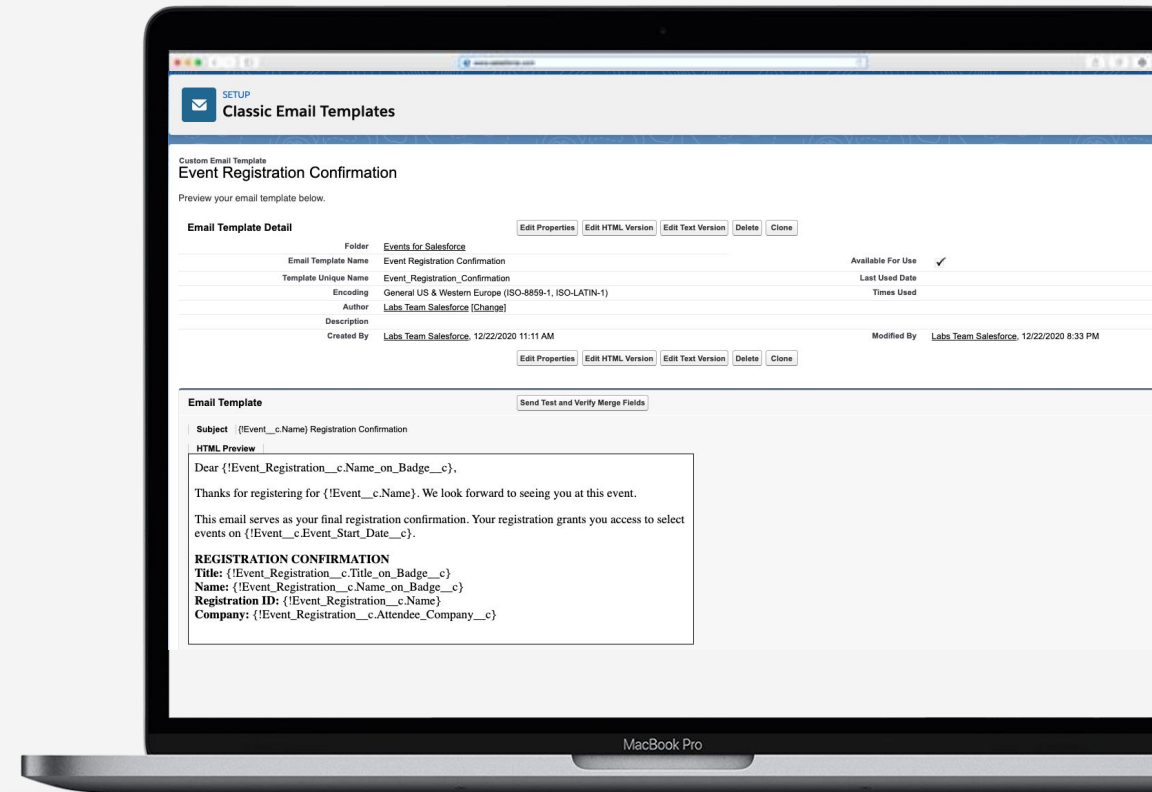
via Email Templates

Simplified the process to customize the emails

- Modify via standard Email Template functionality
- Modify the message
- Add Logos, customize the fonts and colors to be consistent with your brand

Support for HTML and Rich Text formats

Separate templates for Confirmation and Reminder Emails*



* Standard Email Limits apply

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Improve the UX

Lightning Friendly*

- Registration list & Event Capacity report added to Event detail page for easier visibility.
- Event Summary Dashboard added to Event App Home Page

Start Time and End Times

Added the ability to specify an event's start and end times.

Online Meeting Fields

New fields to capture the online mtg URL and passcode

Clean Data Entry thru Validation Rules

OOTB validation rules (e.g. end date can't be before start date) configured for cleaner data entry



* Lightning Required



Thank You

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YOUR
TRAIL

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