

Project Title: Event Venue CRM

Phase 9 — Reporting, Dashboards & Security (Developer)

9.1 Report — Bookings by Venue

Purpose: Provide summary of bookings grouped by venue.

Setup:

- Reports → New → Custom Report Type → Bookings with Venues
- Fields: Venue_c, Start_DateTime_c, Booking_Amount_c
- Group Rows: Venue_c
- Summarize Booking_Amount_c → SUM

Outcome: Venue-wise booking summary ready for dashboards.

The screenshot shows the Salesforce interface with the following details:

Dashboard View: A chart titled "Bookings by Venue Summary" showing a single data point for "Royal Hall" with a value of ₹40k. The Y-axis is labeled "Sum of Booking Amount" with ticks at ₹0, ₹10k, ₹20k, ₹30k, and ₹40k. The X-axis is labeled "Venue". Below the chart is a link "View Report (Bookings by Venue Summary.)".

Report View: A detailed report titled "Report: Bookings Bookings by Venue Summary." showing the following data:

Total Records	Total Booking Amount		
3	₹40,000.00		
Venue ↑	Booking: Booking Number	Start Date/Time	Booking Amount
Royal Hall (3)	BK-0001	9/20/2025, 6:00 PM	₹20,000.00
	BK-0002	9/23/2025, 12:00 PM	₹20,000.00
	BK-0003	9/24/2025, 12:00 PM	₹0.00
Subtotal			₹40,000.00
Total (3)			₹40,000.00

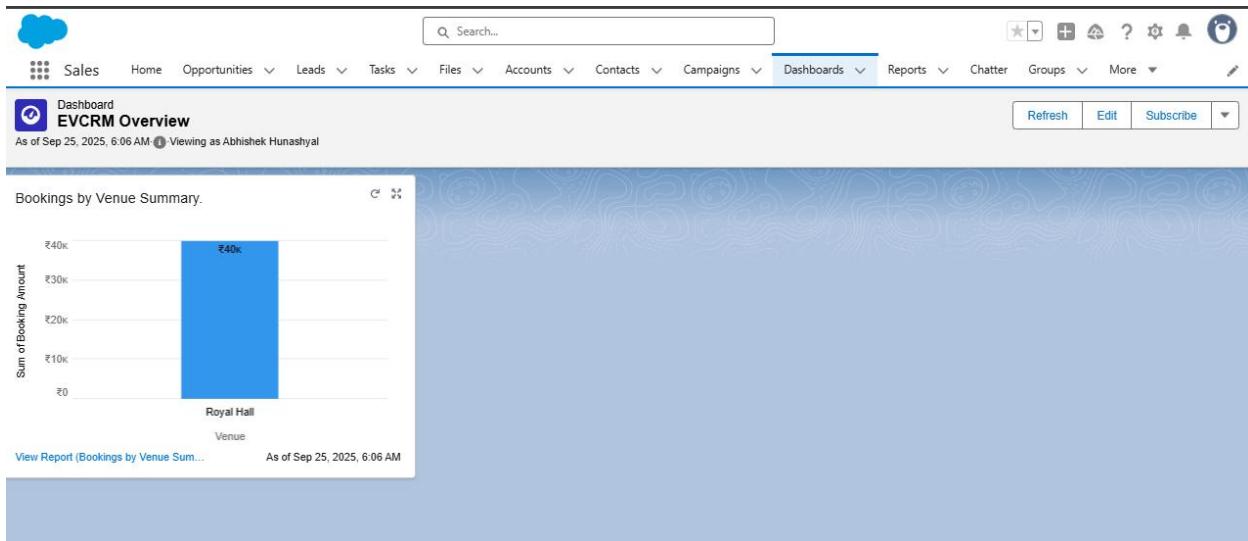
9.2 Dashboard — EVCRM Overview

Purpose: Visualize booking metrics in one view.

Setup:

- Dashboards → New → Name: EVCRM Overview
- Add Component → Bookings by Venue Summary report
- Chart Type: Bar or Donut

Outcome: Dashboard provides key booking insights to users.



9.3 Sharing & Security

Public Group Setup:

Purpose: Define group for Venue Managers.

Setup:

- Setup → Quick Find → Public Groups → New
- Label/Name: Venue Managers
- Add Users: Venue Manager 1, etc.
- Save

Owner-Based Sharing Rule:

Purpose: Share Booking__c records with Venue Managers.

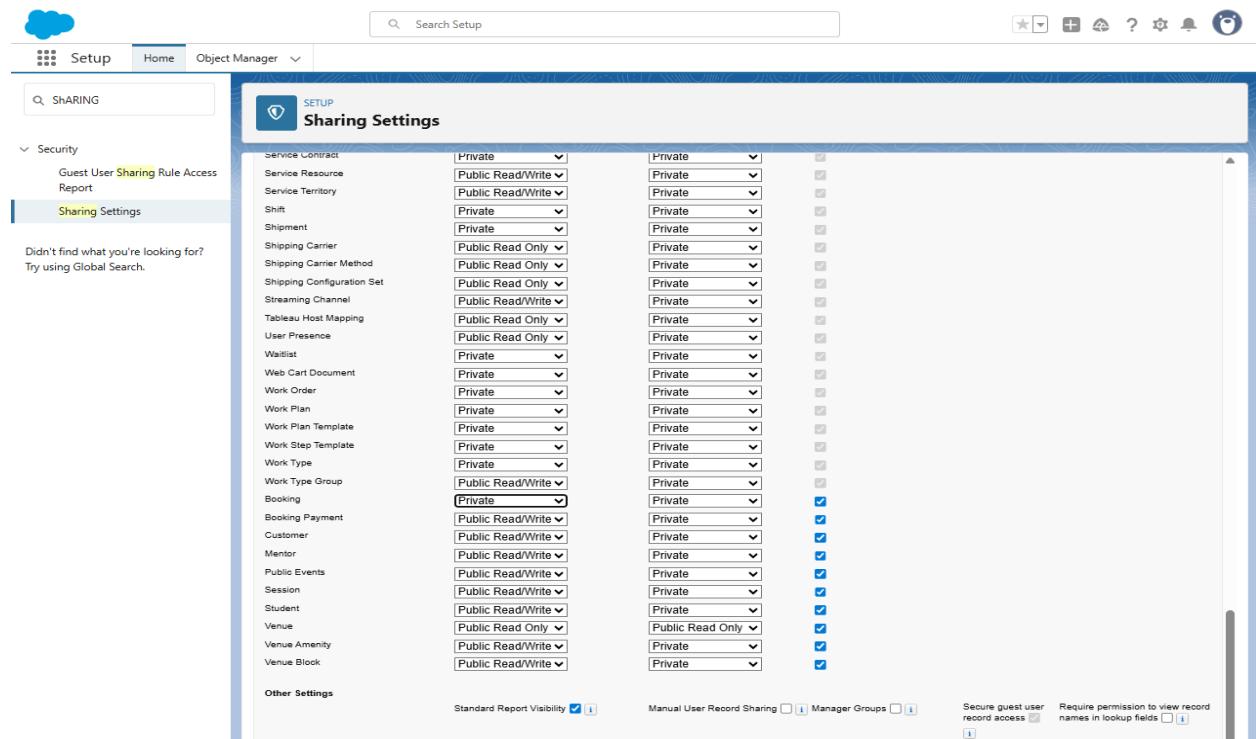
Setup:

- Setup → Sharing Settings → Booking_c → Sharing Rules → New
- Label: Share Bookings with Venue Managers
- Rule Type: Owner-based → Records owned by All Internal Users or specific role
- Share with: Public Group → Venue Managers
- Access Level: Read/Write

Verification:

- Login as Venue Manager → confirm access to Booking_c records
- Test: Create Booking as Admin → Venue Manager can view/edit based on sharing

Outcome: Venue Managers have correct access to bookings; org security implemented



The screenshot shows the Salesforce Sharing Settings page under the Setup menu. The left sidebar has a 'Sharing' section selected. The main area displays a table of sharing rules for various objects. The 'Booking' object is highlighted with a yellow background. The table columns include Service Contract, Service Resource, Service Territory, Shift, Shipment, Shipping Carrier, Shipping Carrier Method, Shipping Configuration Set, Streaming Channel, Tableau Host Mapping, User Presence, Walllist, Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Work Type, Work Type Group, and other objects like Customer, Mentor, Public Events, Session, Student, Venue, Venue Amenity, and Venue Block. The 'Sharing Rule Access' dropdown for most objects is set to 'Private'. For 'Booking', it is set to 'Public Read/Write'. The 'Sharing Rule Type' dropdown for most objects is set to 'Owner-based'. For 'Booking', it is set to 'All Internal Users'. The 'Sharing Rule Condition' dropdown for most objects is set to 'None'. For 'Booking', it is set to 'Custom Condition'. The 'Sharing Rule Action' dropdown for most objects is set to 'Share'. For 'Booking', it is set to 'Edit'. The 'Sharing Rule Status' dropdown for most objects is set to 'Active'. For 'Booking', it is set to 'Inactive'. The 'Sharing Rule Description' field for 'Booking' is empty.

Object	Sharing Rule Access	Sharing Rule Type	Sharing Rule Condition	Sharing Rule Action	Sharing Rule Status
Service Contract	Private	Owner-based	None	Share	Active
Service Resource	Public Read/Write	Owner-based	None	Share	Active
Service Territory	Public Read/Write	Owner-based	None	Share	Active
Shift	Private	Owner-based	None	Share	Active
Shipment	Private	Owner-based	None	Share	Active
Shipping Carrier	Public Read Only	Owner-based	None	Share	Active
Shipping Carrier Method	Public Read Only	Owner-based	None	Share	Active
Shipping Configuration Set	Public Read Only	Owner-based	None	Share	Active
Streaming Channel	Public Read/Write	Owner-based	None	Share	Active
Tableau Host Mapping	Public Read Only	Owner-based	None	Share	Active
User Presence	Public Read Only	Owner-based	None	Share	Active
Walllist	Private	Owner-based	None	Share	Active
Web Cart Document	Private	Owner-based	None	Share	Active
Work Order	Private	Owner-based	None	Share	Active
Work Plan	Private	Owner-based	None	Share	Active
Work Plan Template	Private	Owner-based	None	Share	Active
Work Step Template	Private	Owner-based	None	Share	Active
Work Type	Private	Owner-based	None	Share	Active
Work Type Group	Public Read/Write	Owner-based	None	Share	Active
Booking	Public Read/Write	All Internal Users	Custom Condition	Edit	Inactive
Booking Payment	Public Read/Write	Owner-based	None	Share	Active
Customer	Public Read/Write	Owner-based	None	Share	Active
Mentor	Public Read/Write	Owner-based	None	Share	Active
Public Events	Public Read/Write	Owner-based	None	Share	Active
Session	Public Read/Write	Owner-based	None	Share	Active
Student	Public Read/Write	Owner-based	None	Share	Active
Venue	Public Read Only	Owner-based	None	Share	Active
Venue Amenity	Public Read/Write	Owner-based	None	Share	Active
Venue Block	Public Read/Write	Owner-based	None	Share	Active

At the bottom of the page, there are several checkboxes: Standard Report Visibility (checked), Manual User Record Sharing (unchecked), Manager Groups (unchecked), Secure guest user record access (unchecked), and Require permission to view record names in lookup fields (unchecked).

The screenshot shows the Salesforce Setup interface for creating a new Sharing Rule. The left sidebar has a 'Sharing' search bar and sections for Security (Guest User Sharing Rule Access Report, Sharing Settings), and Global Search. The main content area is titled 'Sharing Settings' under 'SETUP'. It's specifically for a 'Booking Sharing Rule'. The steps are as follows:

- Step 1: Rule Name**: Label is 'Share Bookings with Venue', Rule Name is 'Share_Bookings_with_Venue', and Description is empty.
- Step 2: Select your rule type**: Rule Type is set to 'Based on record owner'.
- Step 3: Select which records to be shared**: Booking owned by members of 'Public Groups' and All Internal Users.
- Step 4: Select the users to share with**: Share with 'Public Groups' and 'Venue Managers'.
- Step 5: Select the level of access for the users**: Access Level is 'ReadWrite'.

At the bottom are 'Save' and 'Cancel' buttons. A note at the top right says 'Help for this Page'.