

# Project Title: Venue Connect 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:

**Top Navigation Bar:** Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, More.

**Dashboard Overview:** EVCRM Overview. A chart titled "Bookings by Venue Summary" shows a single data point for "Royal Hall" with a value of ₹40k. Below the chart is a link to "View Report (Bookings by Venue Summary.)".

**Report View:** Report: Bookings by Venue Summary. Total Records: 3, Total Booking Amount: ₹40,000.00. The report table includes columns: Booking: Booking Number, Start Date/Time, Booking Amount. Data rows show three bookings for Royal Hall on different dates at ₹20,000 each, totaling ₹40,000.

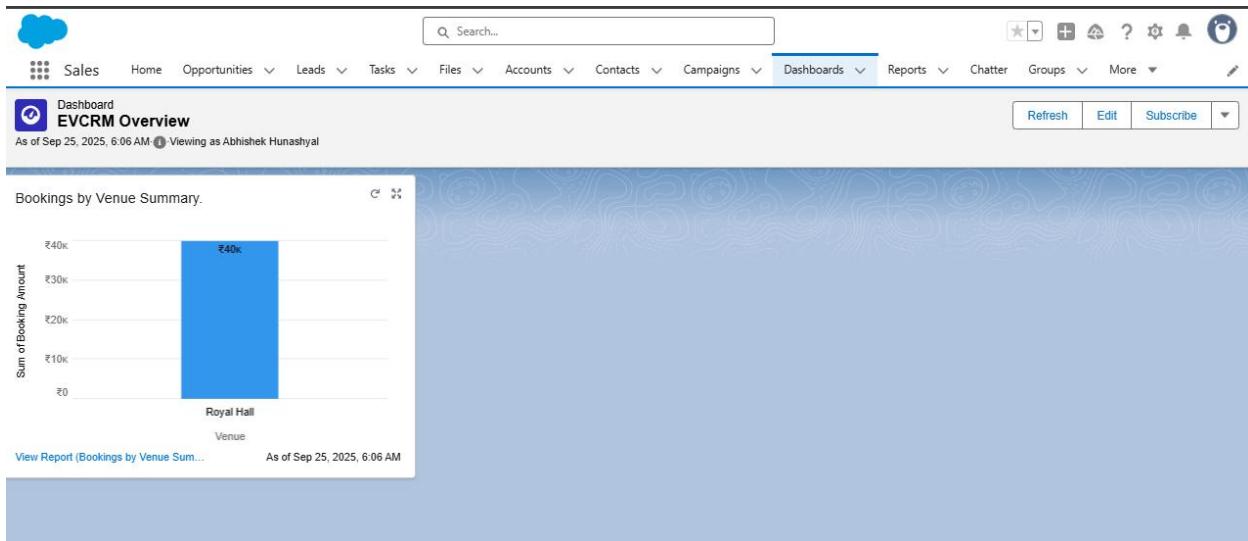
## 9.2 Dashboard — EVCRM Overview

*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.

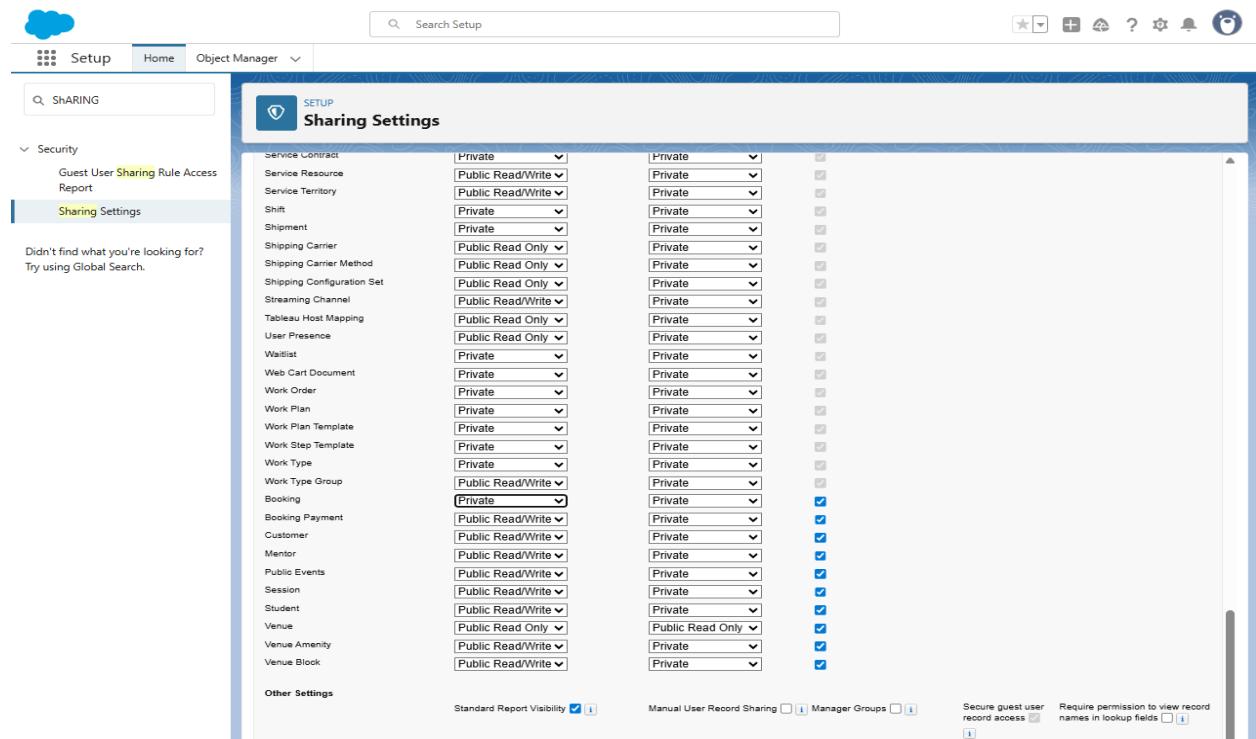
*Setup:*

- 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. Most objects have their sharing set to 'Private'. The 'Booking' object is explicitly set to 'Private'. Other objects like 'Service Contract', 'Service Resource', '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', 'Customer', 'Mentor', 'Public Events', 'Session', 'Student', 'Venue', 'Venue Amenity', and 'Venue Block' all have their sharing set to 'Public Read/Write'. There are checkboxes for 'Secure guest user record access' and 'Require permission to view record names in lookup fields' at the bottom.

Object	Sharing Rule	Sharing Rule
Service Contract	Private	Private
Service Resource	Public Read/Write	Private
Service Territory	Public Read/Write	Private
Shift	Private	Private
Shipment	Private	Private
Shipping Carrier	Public Read Only	Private
Shipping Carrier Method	Public Read Only	Private
Shipping Configuration Set	Public Read Only	Private
Streaming Channel	Public Read/Write	Private
Tableau Host Mapping	Public Read Only	Private
User Presence	Public Read Only	Private
Walllist	Private	Private
Web Cart Document	Private	Private
Work Order	Private	Private
Work Plan	Private	Private
Work Plan Template	Private	Private
Work Step Template	Private	Private
Work Type	Private	Private
Work Type Group	Public Read/Write	Private
Booking	Private	Private
Booking Payment	Public Read/Write	Private
Customer	Public Read/Write	Private
Mentor	Public Read/Write	Private
Public Events	Public Read/Write	Private
Session	Public Read/Write	Private
Student	Public Read/Write	Private
Venue	Public Read Only	Public Read Only
Venue Amenity	Public Read/Write	Private
Venue Block	Public Read/Write	Private

Other Settings

Standard Report Visibility  [i]    Manual User Record Sharing  [i]    Manager Groups  [i]

Secure guest user record access     Require permission to view record names in lookup fields

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'.