

Events Change Log

Changes introduced in Events 4.3

- Added new object **Event Expenses** with fields for tracking: **Related Event** (Master-Detail, related to Event), **Amount** (Currency) and **Type** (Picklist: Site Rental, Catering, Transportation, Décor, Printing, Activities & Entertainment and Other). Other fields:
 - Business Purpose (Text 100)
 - City/State (Text 100)
 - Transaction Data (Date)
 - Vendor name (Text 100)
 - Comment (Text Area 255)
- Added New budgeting fields:
 - Activities & Entertainment Budget (Currency)
 - Catering Budget (Currency)
 - Contingency Budget (Currency)
 - Décor Budget (Currency)
 - Other Budget (Currency)
 - Printing Budget (Currency)
 - Site Rental Budget (Currency)
 - Transportation Budget (Currency)
 - Total Budget (Expected Gross Cost) - (Formula: Activities + Catering + Contingency+ Décor + Other + Printing+ Site Rental = Transportation)
- Added New expense Roll-Up Summary fields:
 - Activities & Entertainment Expenses (Currency)
 - Catering Expenses (Currency)
 - Contingency Expenses (Currency)
 - Décor Expenses (Currency)
 - Other Expenses (Currency)
 - Printing Expenses (Currency)
 - Site Rental Expenses (Currency)
 - Transportation Expenses (Currency)
 - Total Expenses (Actual Gross Cost) (Formula: Activities + Catering + Contingency+ Décor + Other + Printing+ Site Rental = Transportation)
- Added new object **Event MDF** with fields for tracking: **Related Event** (Master-Detail, related to Event), **MDF Partner Account** (Lookup - Account), **MDF Partner Contact** (Lookup – Contact, filtered by Account), **MDF Amount** (Currency) and **Agreement Details** (Long Text)
- Added **Total Expected MDF** expense Roll-Up Summary (Currency)
- Added **Total Actual MDF** expense Roll-Up Summary (Currency)
- Deprecated previous “**MDF**” field, replaced by **Total Expected MDF**, **Total Actual MDF** and new Event MDF object
- Deprecated previous “Total Budget” field, replaced by Total Budget (Expected Gross Cost)

- Depreciated previous “Gross Cost” field, replaced by Total Expenses (Actual Gross Cost) and new Event Expense object
- Depreciated previous “Net Cost” field, replaced by **Net Expected Cost** and **Net Actual Cost** fields

Events 4.0 Release Notes:

- Your system administrator will need to create a new Account Types named “**Event Vendor**”, a Page layout named “Account (Vendor) Page Layout” has been provided for optional use

Changes introduced in Events 4.0

- The object “**Vendors**” was removed, this is superseded by Accounts with the Type = “**Event Vendor**”. Please make certain to manually create this account type in your system for proper filtering on the Event Page Layout
- Event - Revised Search Layouts, Now includes Event Name, Event Start Date, Venue City, Venue State
- Session - Revised Search Layouts, Now includes Session Name, Link to Event, Track, Room, Owner Alias
- Speaker - Revised Search Layouts, Now includes Speaker Id, Speaker Display Name, Session, Track
- Room - Revised Search Layouts, Now includes Room Name, Venue
- Venue - Revised Search Layouts, Now includes Venue Name, City, State, Map to Venue
- Account.Type - Added 'Event Vendor' to the picklist
- Event.Event_Vision - Changed field type from Text Area (Long) to Text Area (Rich)
- Event.Event_Vendor_Account - New lookup field (lookup to Account) with optional filter criteria Account.Type = 'Event_Vendor' - Help text message "Please select an Account with the Type = 'Event Vendor' for this event."
- Event.Map_To_Venue – Formula: Hyperlink to Google map, based on the selected venue address
- Event.Primary_Vendor_Contact - Lookup from contacts, filtered by the list of contacts associated with the selected Vendor Account
- Event.Primary_Vendor_Contact_Phone – Formula: Pulls from Contact.Phone
- Event.Vendor - Removed previous Vendor with its lookup to the custom Vendor object
- Event.Vendor_Street_Address_2 - Corrected name to Venue_Street_Address_2 Field lookup was correct, however name was Vendor, should have been Venue
- Event.Venue_Postal_Code - Formula - Pulls from Venue.Postal_Code
- Event.Venue_Status - Removed this field, relocated to the Event object. Makes more sense for the venue status to be associated with the event after the venue is selected.
- Room.Audio/Visual_Requirements - Removed from Room, moved to Session
- Room.Room_Setup - Changed field type to multi-select pick list
- Room.Venue - Changed the relationship to a master-detail relationship with Venue

- Session.Audio/Visual_Requirements - Text Field (Moved from the Room object)
- Session.Room_Setup - Picklist field, matching the possible options from the Room object
- Session.Track - Changed the relationship to a master-detail relationship with Track
- Speaker.Session - Changed the relationship to a master-detail relationship with Session
- Speaker.Speaker_Name - Corrected label to Speaker ID
- Track.Event - Changed the relationship to a master-detail relationship with Event
- Track.Track_Owner - Owner for each event track
- Track.Track_Website - Subweb for each event track
- Venue.Map_To_Venue – Formula: Hyperlink to google map, based on the venue address
- Venue.Map_To_Location - Removed - Replaced by Map to Venue
- Venue - Venue Image Location: Removed, Superseded by Notes & Attachments and/or Chatter files
- Event - Event Page Layout :General Information, Moved Event Description before Event Vision
- Account - Account (Vendor) Page Layout, New Page Layout, based on Account Layout, dropped Opportunity and Case Related Lists, added Event Related List
- Event - Event Page Layout: Vendor & Venue, Added Map to Venue
- Venue - Venue Page Layout; Venue Detail, Added Map to Venue
- Venue - Venue Image Location Page Layout, Removed
- Chatter enabled on the following objects: Event, Venue, Speaker, and Session
- New Object: Event Registrations (Event, Contact, Primary Track of Interest, Attendee Company, Address and Phone, Name on Badge, Title on Badge, and Dietary Needs)
- Event Page Layout – Added additional fields to “Tracks” Related List
- Event Page Layout – Added Event Registrations related list
- Track Page Layout – Added additional fields to “Sessions” and “Speakers” Related Lists