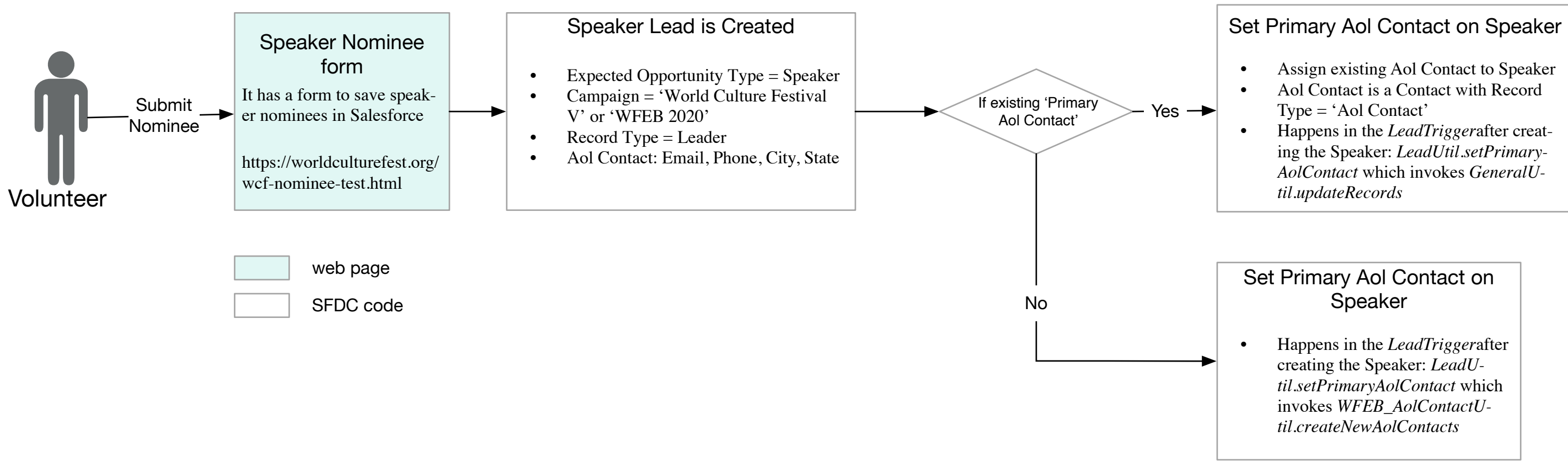


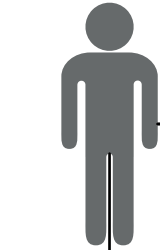
Process for Nominee Submission for WCF and WFEB

Submit Nominees



Approve Nominee

- SFDC code
- VF page



Approver

Send Invitation

Approve Nominee & optionally send invitation

Send Invitation

Leads to be approved

Access from **‘WCF Approve’ tab**

- First Name
- Last Name
- Invitee Type: Speaker (Opportunity Record Type)
- Tier
- Send Invitation (Yes/No)
- Action (Approved, Deferred)

WFEBLeadApprovalList

Leads to be approved

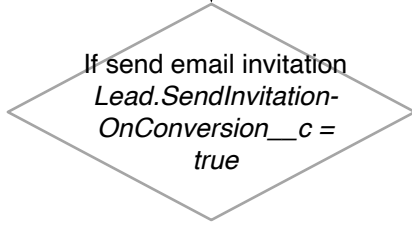
if user approves the lead, set the approval status = Approved

WFEB_LeadApprovalListCTRL

Lead Conversion to Contact with Speaker Opportunity

When Speaker lead is approved (Approval Status = Approved) it is convert to Contact with opportunity

Triggers *‘Trigger Lead Conversion Process’* workflow (Process Builder), which invokes *WFEB_LeadConversion.convertSpeakerLeads()*



WFEB_InviteAsSpeakerController

- Generate invitation letter**
 - invoke the **‘corresponding PDF generator Visual Page:** */apex/‘record type name’_‘campaign name’_Pdf’;*
 - Invitation pdf name:** “opportunity record type name” “speaker last name”.pdf
- Sent Email:**
 - From email** address uses Organization-Wide Email Addresses with Naming Convention: campaign name
 - Invitation **Email Template.** Naming Convention: “opportunity record type name” “campaign name” Invitation
- Set *Opportunity.Stage = ‘Invitation Submitted’*

Based on *WFEB_LeadConversion.sendWfebInvitations()* which invokes *WFEB_SpeakerInvitationController*

Invitation Pdf Generation

Here are the VF pages:

- WCF_Speaker_WCF_V_Pdf
- WFEB_Speaker_WCF_V_Pdf
- WFEB_Speaker_WFEB_2020_Pdf

Naming Convention: */apex/‘record type name’_‘campaign name’_Pdf’;*

Download the pdf and email manually

Has 4 dynamic fields with values from selected opportunity:

- Envelope
- Title
- Company
- Letter Salutation

Work to be done - not a priority:

- If Speaker is already submitted as part of another campaign (e.g. he has a role in World Culture Festival and WFEB 2020) or same campaign but with different Event role (WCF Speaker and GLF Speaker) update existing Contact with a new Opportunity

Change record type for Speaker Opportunity

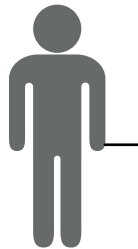
Triggers *‘Map Opportunity Record Type at Lead Conversion’* workflow (Process Builder)

Update Opportunities post Conversion

- Set Primary Contact field on Speaker Opportunity
- Set Opportunity name
- Set Stage = Generate Invitation

WFEB_LeadConversion.setPrimaryContactOnOpportunity()

See Approved Nominees



Approver

See Approved Speakers

Approved Speakers

Access from **'WCF Approved' tab**

- Name
- Title
- Company
- Invitee Type (Speaker)

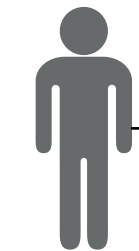
WFEBSpeakerList

Approved Speakers

Show the Speakers for the desired campaign that have been approved

WFEB_SpeakerListCTRL

Admin Process



Admin

Approve Nominee Manually

- Go to Opportunities List view in SFDC
- Click on Convert button
- If existing Company - select it under Account field
- Uncheck 'Do not create a new Opportunity upon conversion'



Generate Invitation Manually

- a. one invitation letter at a time - by clicking "Generate Invitation" button in an Opportunity (download pdf)
- b. in bulk on Opportunity List View page - by clicking "Invite as Speaker" button

Invitation letter PDF naming convention: <<Campaign>> - <<Envelope custom field>> e.g. "World Culture Festival V - Ms. John Doe.pdf"

Opportunity Stage is set to 'Invitation Submitted'



Admin

Add a new 'Event / Role' in the Speaker Form

- update the 'Expected Opportunity Type' picklist for the Lead
- update *Map Opportunity Record Type in the Lead Conversion* Flow (Process Builder)



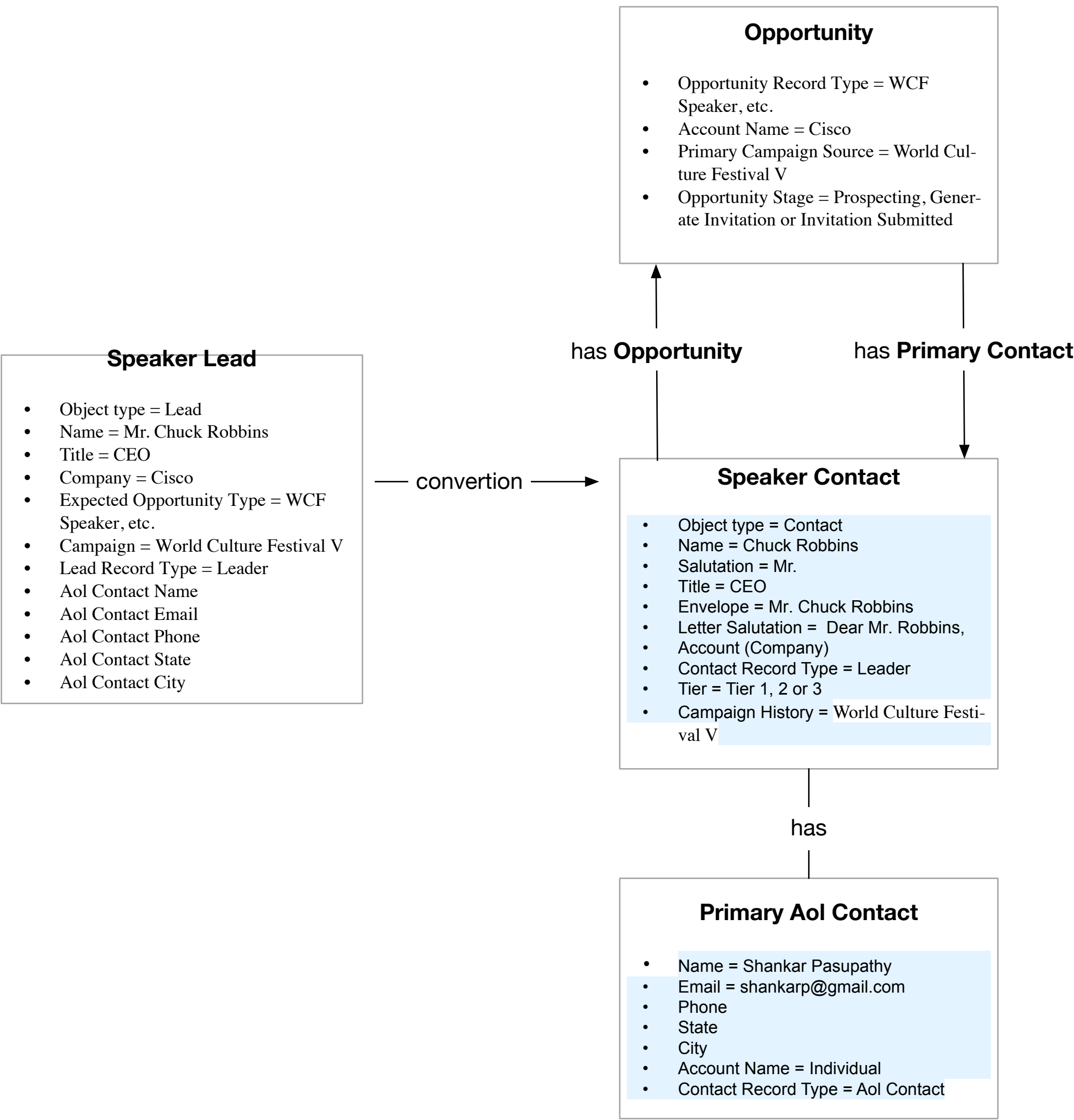
Admin

Update Opportunity Name

- Go to [NPSP Settings](#) (load NSP App) and under Donations left menu, go to "Opportunity Names"
- Workflow rule: [WFEB Set Opportunity Name](#)

Tab order: Setup -> App Manager -> Nonprofit Starter Pack
Customize Home: Setup -> Lightning App Builder

Object Hierarchy



Each contact and lead has **Contact Record Type**: [Leader](#), [Aol Contact](#) and [Congressional Leader](#)

Each contact and lead has a **Tier**: [Tier 1](#), [Tier 2](#), [Tier 3](#)

An Opportunity has a **Primary Contact** (custom field), which is for e.g the speaker.

Opportunity Record Type: [WCF Speaker](#), [WFEB Speaker](#), etc.

Opportunity Name is populated based of ~~setting in: NPSP Settings->Donations->Opportunity Names or Workflow~~ WFEB_LeadConversion.setPrimaryContactOnOpportunity() rule: WFEB Set Opportunity Name

Heroku App - NOT USED

Full Name	Title	Company	Tier	Action
Mr. Tim Cook	CEO	Apple	1	Approved
Ms. Aicha Evans	SVP & GM	Intel	2	Deferred
Mr. Brian Krzanic	CEO	Intel	1	Approved
Mr. Karl Mehta	CEO	Edcast	2	Deferred
Mr. Chuck Robbi	CEO	Cisco	1	Approved
Mr. Ken Bahl	CEO	Sierra Circuits		
Satya Nadella	CEO	Microsoft	1	

Work to be done:

- change title to WCF 2021 Speaker Approval Page
- filter Leads by:
 - Campaign = ‘World Culture Festival V’
 - Expected Opportunity Type = ‘WCF Speaker’, ‘GLF Speaker’ and ‘Innovation Marketplace Speaker’
- Add a new column for ‘Expected Opportunity Type’

Login to Speakers Approval Page

Dev link: <https://limitless-woodland-78842.herokuapp.com/>
Username: castigliana@gmail.com
Password: castiwfeb17

breath-app Heroku app: <https://breath-app.herokuapp.com>

Heroku account: <https://id.heroku.com/login>
Username: castigliana@gmail.com

WCF Speakers Approval Page

- Shows all Speaker leads for:
 - ‘World Culture Festival V’ campaign
 - Expected Opportunity Type = ‘WCF Speaker’, ‘GLF Speaker’ and ‘Innovation Marketplace Speaker’
- For each record approver selects:
 - Tier
 - Expected Opportunity Type
 - Action (Approved or Deferred)

web page

Heroku App is in Github

See Approved Nominees

All Speakers Page

Shows all Speakers already approved, which are opportunities with:

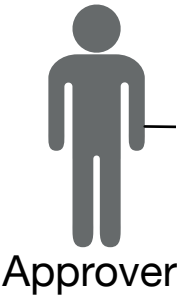
- Campaign = World Culture Festival V’
- Opportunity Record Type=Speaker

Work to be done:

- add “Tier” column
- fix filtering Speaker Opportunities by:
 - Campaign should be ‘World Culture Festival V’ instead of ‘WFEB US 2017’
- Expected Opportunity Type = ‘WCF Speaker’, ‘GLF Speaker’ and ‘Innovation Marketplace Speaker’
- Add a new column for ‘Expected Opportunity Type’

web page

SFDC code



See Approved Nominees