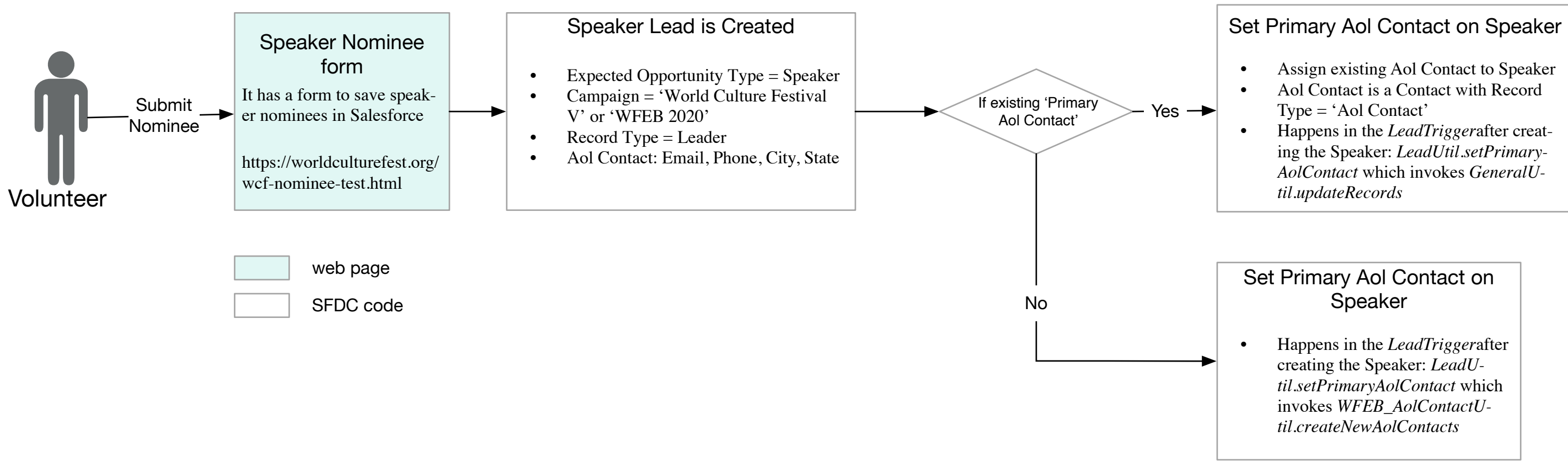
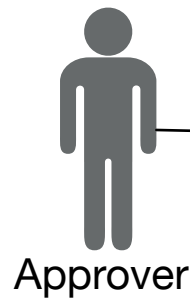


Process for Nominee Submission for WCF and WFEB

Submit Nominees



Approve Nominee



Approve Nominee

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	

Login to Speakers Approval Page

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

breath-app Heroku app: <https://id.heroku.com/login>
Username: castigliana@gmail.com

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’

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)

Work to be done:

- 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

Lead Conversion to Contact with Speaker Opportunity

When Speaker lead is approved (Approval Status = Approved) it is convert to Contact with opportunity, which has Opportunity Stage = *Generate Invitation*

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

Change record type for Speaker Opportunity

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

Work to be done:

- RecordTypeId is hardcoded and should be the “Expected Opportunity Type” set in the Speakers Approval Page
- campaign name is hardcoded: Campaign.Name

Set Primary Contact field on Speaker Opportunity

WFEB_LeadConversion.setPrimaryContactOnOpportunity()



web page



SFDC code

Work to be done:

- fix hardcoded values in *WFEB_SpeakerInvitationController*:
 - email address associated with the outgoing email (owes)
 - invitationDocumentName
 - emailTemplateApiName
- Invitation Letter pdf name should be dynamic by reflecting the campaign in the pdf name (not WFEB)
- create new invitation letter for WCF
- create new email template for WCF
- code should select the right invitation letter and invitation email based on campaign

Email Invitation to Aol Contact (Volunteer)

- Generate invitation letter
Based on *WFEB_LeadConversion.sendWfebInvitations()* which invokes *WFEB_SpeakerInvitationController*
- Set Opportunity Stage = Generate Invitation
It also changes the record type for Opportunity
Based on ‘*Map Opportunity Record Type at Lead Conversion*’ workflow (Process Builder)

OPP_WFEBSpeakerInvitationBTN - Visualforce Page -

Invokes the SendInvitations {} method in OPP_WFEBSpeakerInvitationBTN_CTRL control

OPP_WFEBSpeakerInvitationBTN_CTRL - Apex Class -

Action method called when the user clicks on the Generate Invitations button.

For each opportunity selected:
1. Generate Invitation PDF
2. Email PDF to Primary Aol Contact email

WFEBPdfGeneratorTemplate - Visualforce Page -

Invitation PDF

Has 4 dynamic fields with values from selected opportunity:
1. Envelope
2. Title
3. Company
4. Letter Salutation

See Approved Nominees



Approver

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'

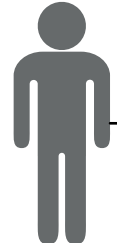


web page



SFDC code

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'

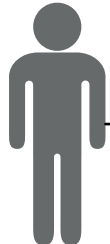


Generate Invitation Manually

- 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)

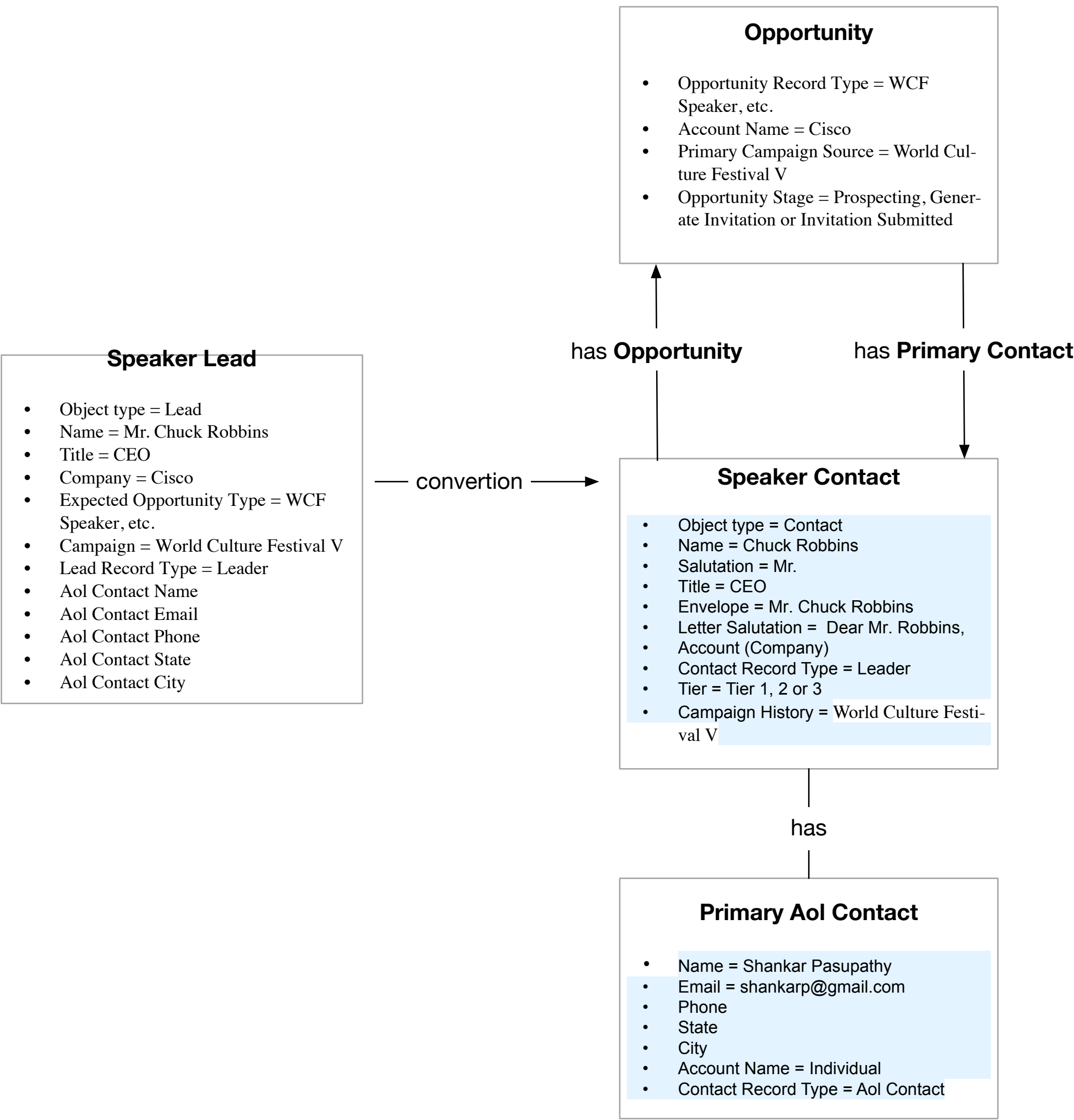


Admin

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](#)

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](#), [GLF Speaker](#), etc.

Opportunity Name is populated based of setting in: NPSP Settings->Donations->Opportunity Names or Worklfow rule: [WFEB Set Opportunity Name](#)