

SALESFORCE INTEGRATION

User's Manual



USER'S MANUAL

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1.0 OVERVIEW

Salesforce.com Inc. is a global cloud computing company headquartered in San Francisco, California. They are best known for their customer relationship management (CRM) product. At its simplest, a CRM system allows businesses to manage business relationships and the data and information associated with them. With CRM, you can store customer and prospect contact information, accounts, leads and sales opportunities in one central location, ideally in the cloud so the information is accessible by many, in real time.

TryBooking's integration with Salesforce allows you to fully utilize your TryBooking data inside Salesforce. When your TryBooking account is connected to a Salesforce account and with the TryBooking app installed, TryBooking can upload the details of the bookings made for your events to Salesforce.

2.0 GETTING STARTED

Click *Salesforce* link under the configuration setup to connect or integrate your account to Salesforce.

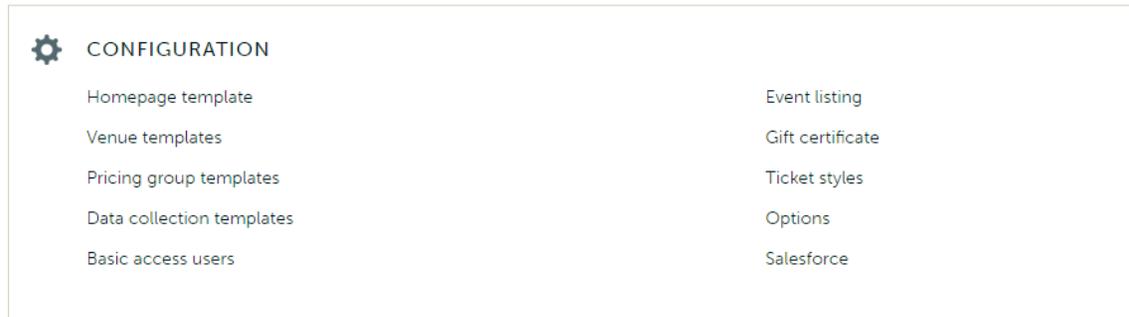


Figure 2.0.1 | Salesforce Link

2.1 Installation and Logging In

To install the TryBooking app in your Salesforce account, click the [here](#) link in the Salesforce Account Details tab.

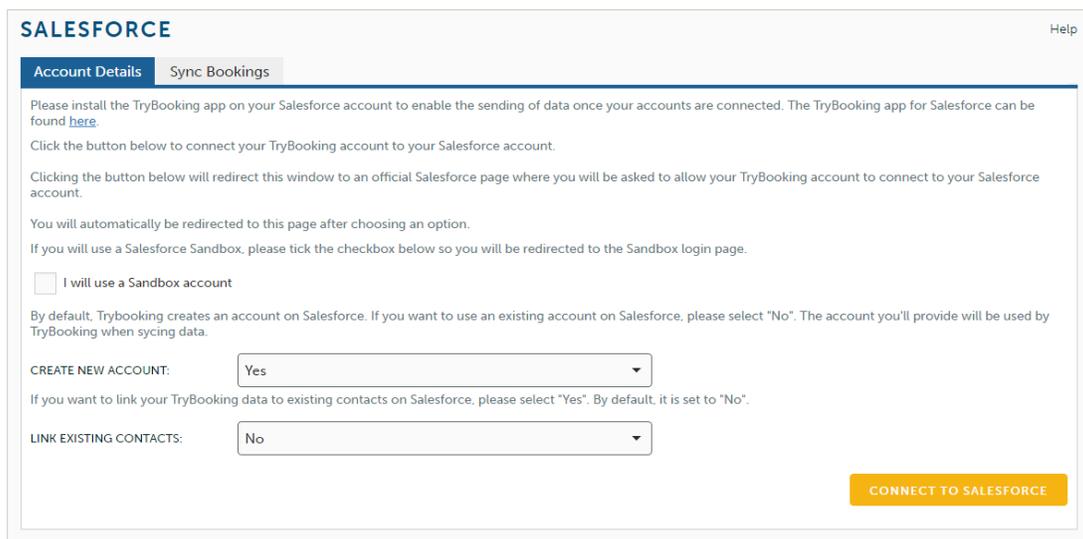
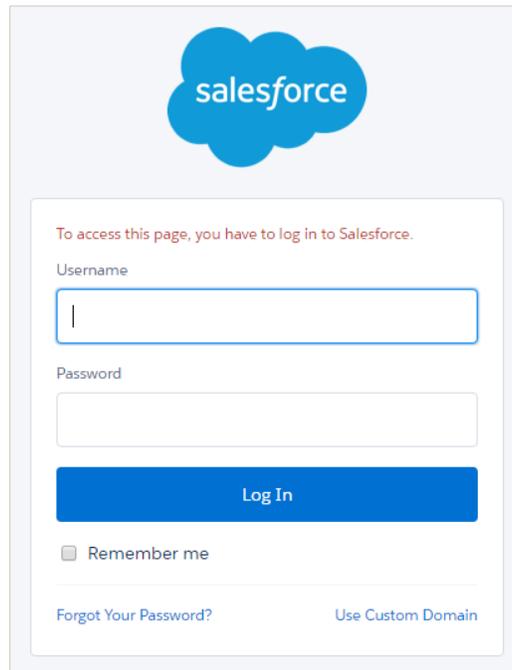


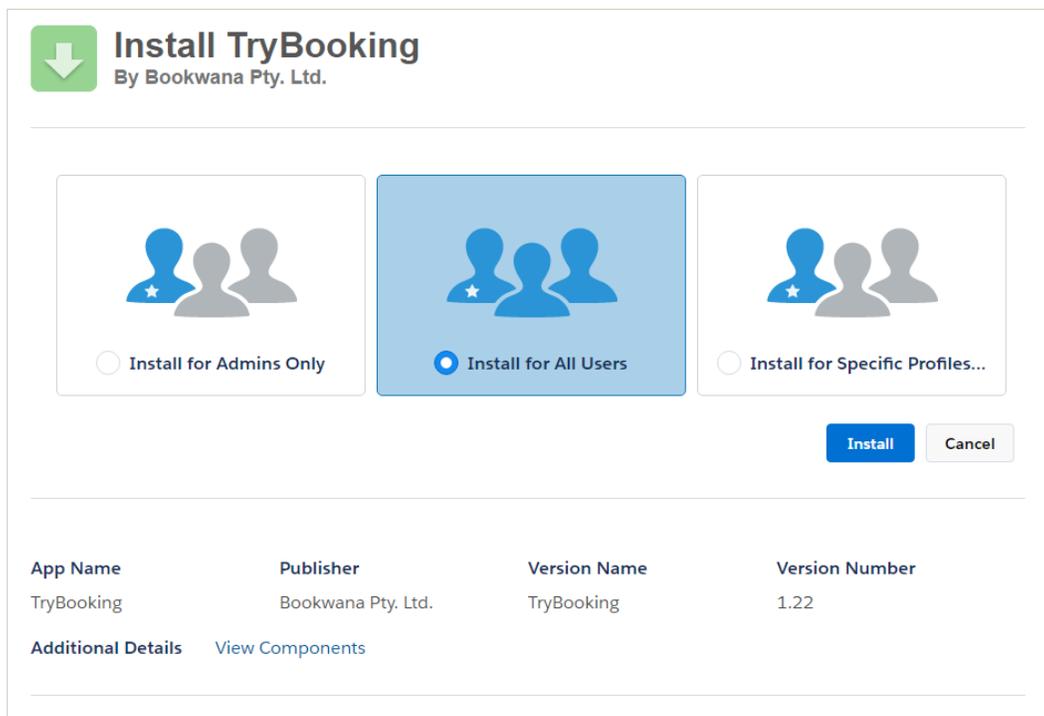
Figure 2.1.1 | Salesforce Account Details Page

Upon clicking the [here](#) link, you will be redirected to the Salesforce Package Installation Details Page as shown in Figure 2.1.3. If you are not yet logged in to Salesforce, you will be asked to log in, as shown in Figure 2.1.2, once logged-in you will then be redirected to the installation page.



The image shows the Salesforce login page. At the top is the Salesforce logo. Below it, a message states: "To access this page, you have to log in to Salesforce." There are two input fields: "Username" and "Password". A blue "Log In" button is positioned below the password field. Underneath the button is a "Remember me" checkbox. At the bottom of the login form, there are two links: "Forgot Your Password?" and "Use Custom Domain".

Figure 2.1.2 | Salesforce Login Page



The image shows the Salesforce Package Installation Details Page for "Install TryBooking" by Bookwana Pty. Ltd. The page features three installation options, each with a radio button and an icon of three people:

- Install for Admins Only
- Install for All Users
- Install for Specific Profiles...

At the bottom right of the options are "Install" and "Cancel" buttons. Below the options is a table with the following details:

App Name	Publisher	Version Name	Version Number
TryBooking	Bookwana Pty. Ltd.	TryBooking	1.22

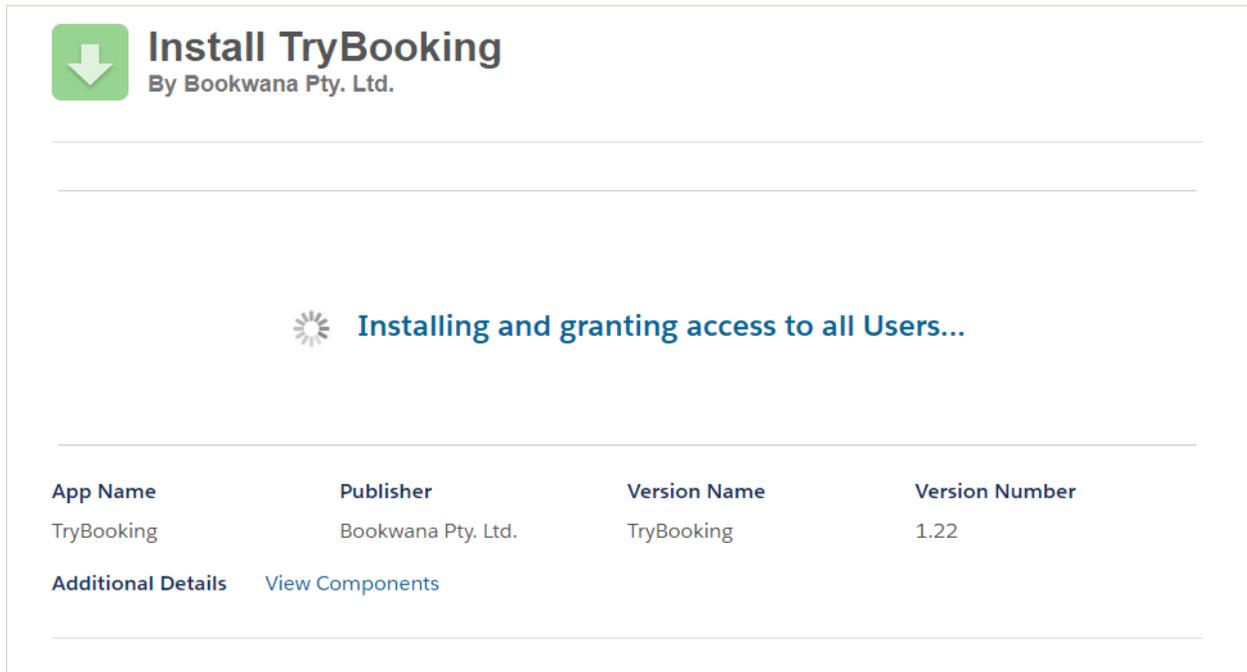
Below the table, there is an "Additional Details" section with a "View Components" link.

Figure 2.1.3 | Salesforce Package Installation Details Page

On the installation page, Salesforce will display the details of the package that will be installed. You will need to specify a security level setting as shown in Figure 2.1.3.

If you want to grant access to admins only, choose the first option. If you want to grant access to all users, choose the second option. If you want to customise the security, choose the third option. After specifying the security level, the TryBooking app is ready to install. Click the **Install** button to continue.

After clicking the button, a notification page may be displayed while the installation is still in progress as shown in Figure 2.1.4, then wait for the site to prompt you that the installation is already complete as shown in Figure 2.1.5.

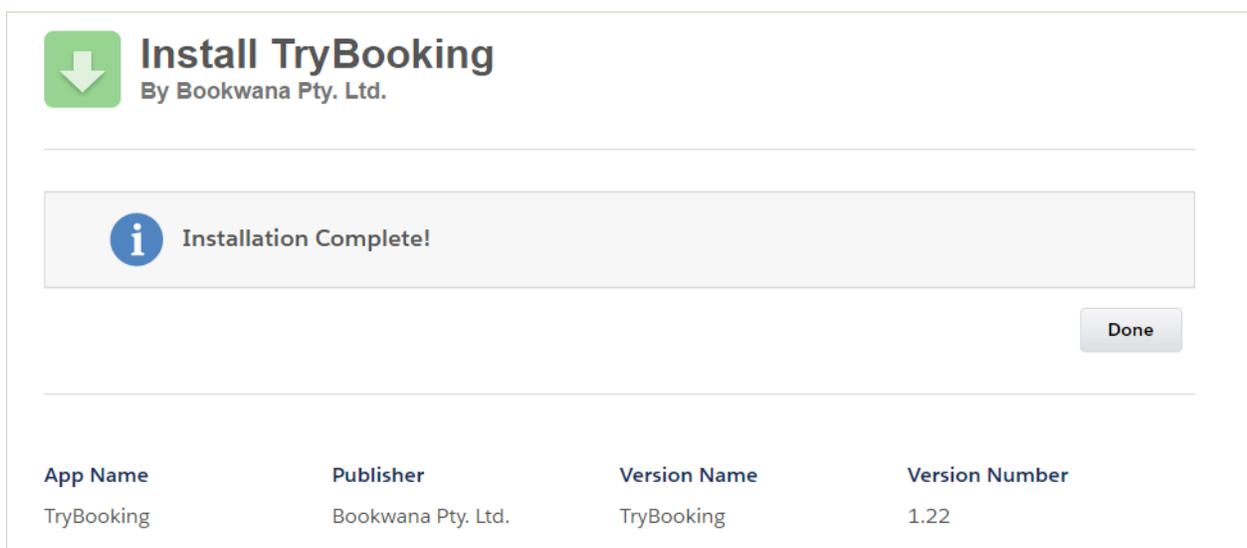


The screenshot shows the 'Install TryBooking' page by Bookwana Pty. Ltd. The page is in a progress state, indicated by a loading spinner and the text 'Installing and granting access to all Users...'. Below this, a table displays the app details:

App Name	Publisher	Version Name	Version Number
TryBooking	Bookwana Pty. Ltd.	TryBooking	1.22

At the bottom of the table, there are two links: 'Additional Details' and 'View Components'.

Figure 2.1.4 | Salesforce Package Installation in Progress



The screenshot shows the 'Install TryBooking' page by Bookwana Pty. Ltd. The installation is complete, indicated by an information icon and the text 'Installation Complete!'. A 'Done' button is visible in the bottom right corner. Below this, a table displays the app details:

App Name	Publisher	Version Name	Version Number
TryBooking	Bookwana Pty. Ltd.	TryBooking	1.22

Figure 2.1.5 | Salesforce Package Installation Complete Page

2.2 Connecting your TryBooking Account

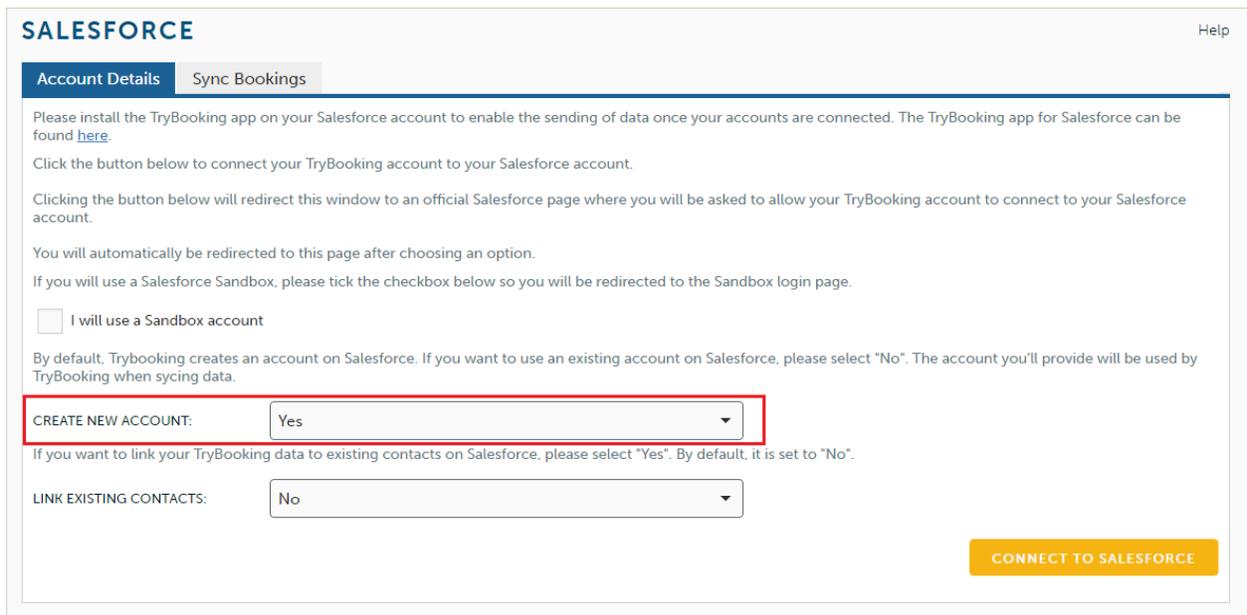
2.2.1 Salesforce Account Settings

There are several ways on how you connect your TryBooking account to Salesforce, these involves the settings which are displayed in the Account Details page. These settings are as follows:

- Create New Account
- Link Existing Contacts
- Connect using Sandbox

Create New Account

Basically, this setting determines whether you want TryBooking to create a new account or use an existing account on your Salesforce to which your contacts will be linked. By default, this setting is set to Yes, as highlighted in Figure 2.2.1.1. If you choose to create a new account, the account will have the following naming format: TryBooking – Name of Account (*e.g. TryBooking – The New Theatre Company*).



The screenshot shows the 'SALESFORCE' interface with a 'Help' link in the top right. Below the header, there are two tabs: 'Account Details' (selected) and 'Sync Bookings'. The main content area contains several paragraphs of text and instructions. A red box highlights the 'CREATE NEW ACCOUNT:' dropdown menu, which is currently set to 'Yes'. Below this, there is a 'LINK EXISTING CONTACTS:' dropdown menu set to 'No'. At the bottom right, there is a yellow button labeled 'CONNECT TO SALESFORCE'.

Figure 2.2.1.1 | Salesforce Account Details Page – Create New Account

However, when you want to use an existing account on your Salesforce, just select No and a new field will be displayed where you will need to enter the Account ID as highlighted on Figure 2.2.1.2.

SALESFORCE Help

Account Details | Sync Bookings

Please install the TryBooking app on your Salesforce account to enable the sending of data once your accounts are connected. The TryBooking app for Salesforce can be found [here](#).

Click the button below to connect your TryBooking account to your Salesforce account.

Clicking the button below will redirect this window to an official Salesforce page where you will be asked to allow your TryBooking account to connect to your Salesforce account.

You will automatically be redirected to this page after choosing an option.

If you will use a Salesforce Sandbox, please tick the checkbox below so you will be redirected to the Sandbox login page.

I will use a Sandbox account

By default, Trybooking creates an account on Salesforce. If you want to use an existing account on Salesforce, please select "No". The account you'll provide will be used by TryBooking when syncing data.

CREATE NEW ACCOUNT:

Please indicate the Id of the account in Salesforce to which TryBooking will sync your data. To locate the Id, please click [here](#).

SALESFORCE ACCOUNT ID:

If you want to link your TryBooking data to existing contacts on Salesforce, please select "Yes". By default, it is set to "No".

LINK EXISTING CONTACTS:

CONNECT TO SALESFORCE

Figure 2.2.1.2 | Salesforce Account Details Page – Salesforce Account ID

If you opted to use an existing account on your Salesforce, make sure that you use the correct ID. To get the account's ID on your Salesforce, just follow these steps:

1. Login to your Salesforce Org.
2. In the Salesforce Homepage, go to the Accounts tab. Please see Figure 2.2.1.3 to locate the Accounts Tab.

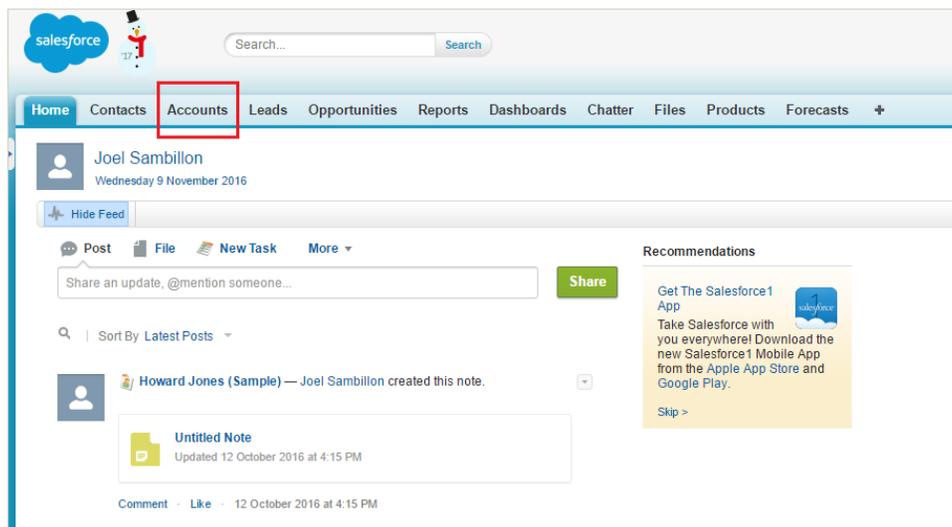


Figure 2.2.1.3 | Accounts tab in Salesforce Org Homepage

3. From the List of all your accounts, select the account you want to use.
4. Once you're on the Account Details page, go to the browser's address bar.

5. The Account ID is the string (except the “/”) after the Salesforce domain (e.g. <https://ap2.salesforce.com/0012800000utCL4>, the Account ID is *0012800000utCL4*. Please see Figure 2.2.1.4 to locate your Account ID.

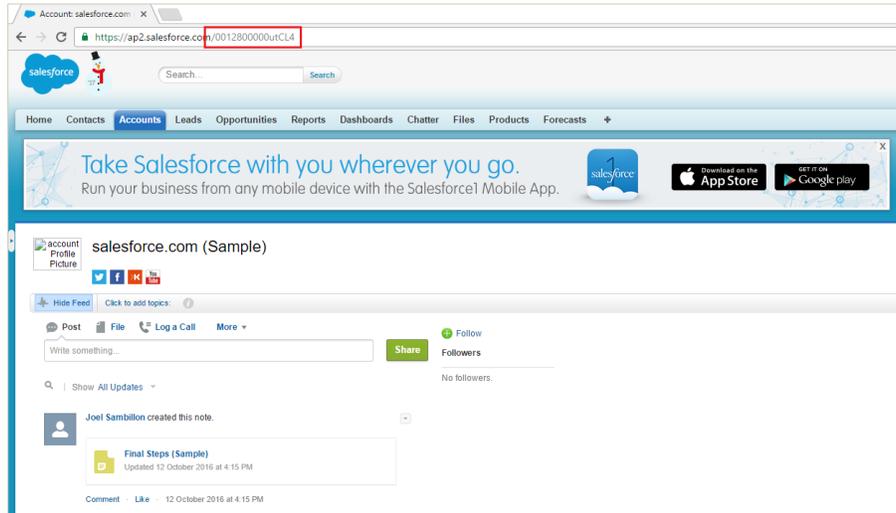


Figure 2.2.1.4 | Accounts tab in Salesforce Org Homepage

Copy the Account ID and paste it on the field provided for the Salesforce Account Id. This will be the reference account used to sync your contacts during booking and syncing.

Link Existing Contacts

Generally, this setting as highlighted in Figure 2.2.1.5 will determine whether TryBooking will link bookings to existing contacts on your Salesforce or create a new contact regardless if the contact exists on your Salesforce. The contact’s email will be used as a reference in determining if the contact exists on your Salesforce.

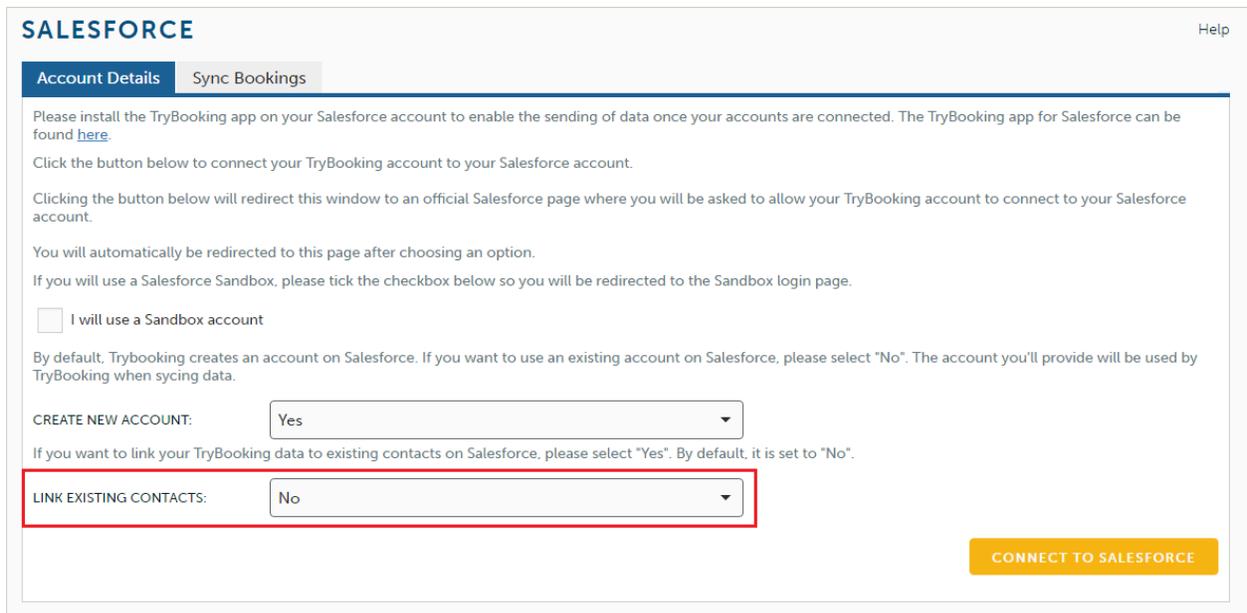


Figure 2.2.1.5 | Salesforce Account Details Page – Link Existing Contacts

Connect Using Sandbox

In Salesforce, Sandbox is a nearly identical copy of your production environment, which can include data, configurations, or both. It is available to Enterprise and Unlimited Edition customers.

If you have Sandbox and want to use it for testing TryBooking to Salesforce connection, you can do so by marking the **"I will use a Sandbox account"** checkbox on the Salesforce Account Details page in TryBooking as shown in Figure 2.2.1.6.

The screenshot shows the 'SALESFORCE' section of the TryBooking interface. It has two tabs: 'Account Details' (active) and 'Sync Bookings'. The main content area contains instructions for connecting the TryBooking app to a Salesforce account. A checkbox labeled 'I will use a Sandbox account' is checked and highlighted with a red border. Below this are two dropdown menus: 'CREATE NEW ACCOUNT:' set to 'Yes' and 'LINK EXISTING CONTACTS:' set to 'No'. A yellow 'CONNECT TO SALESFORCE' button is located at the bottom right of the form.

Figure 2.2.1.6 | Accounts tab in Salesforce Org Homepage

2.2.2 Connecting to Salesforce

Click the **CONNECT TO SALESFORCE** button to connect your TryBooking account with your Salesforce account. Upon clicking the button, you will be redirected to the Salesforce login page for authentication.

This screenshot is identical to Figure 2.2.1.6, but the 'I will use a Sandbox account' checkbox is unchecked. The rest of the form, including the dropdown menus and the 'CONNECT TO SALESFORCE' button, remains the same.

Figure 2.2.2.1 | Salesforce Account Details Page

Enter your user name and password. After entering your login credentials, click the

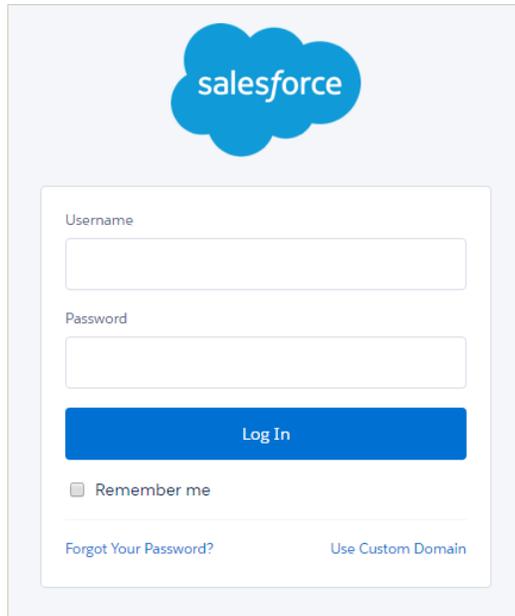


Figure 2.2.2.2 | Salesforce Login Page

After successfully logging in to Salesforce, click the



button to allow TryBooking to access your Salesforce account.

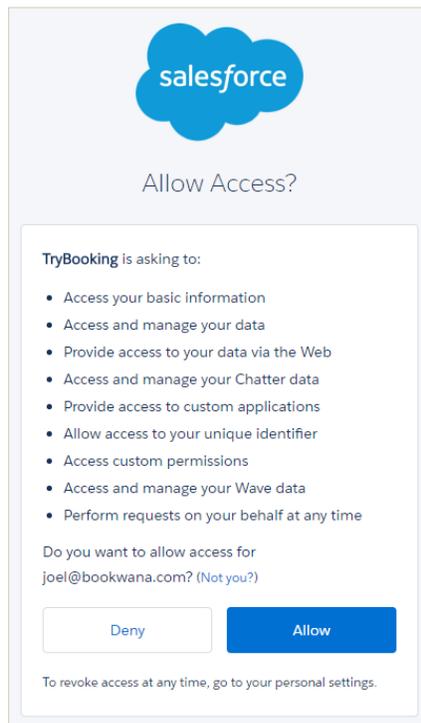
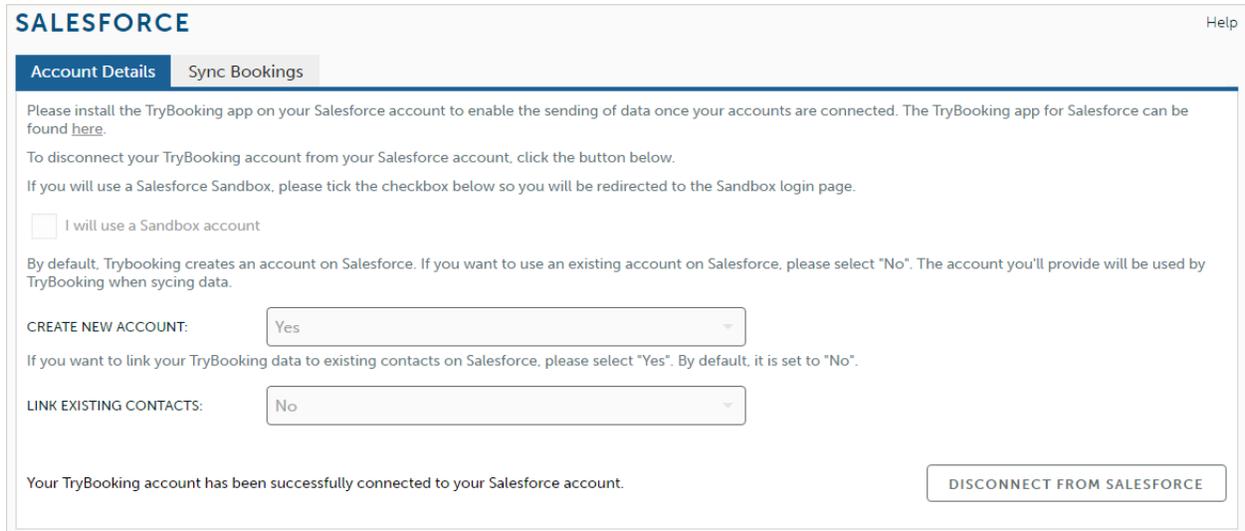


Figure 2.2.2.3 | Salesforce App Permission Page

2.3 Salesforce Account Verification

When connecting your TryBooking account with your Salesforce account, regardless if your application permission is successful or denied, the page will automatically be redirected back to the TryBooking Salesforce page.

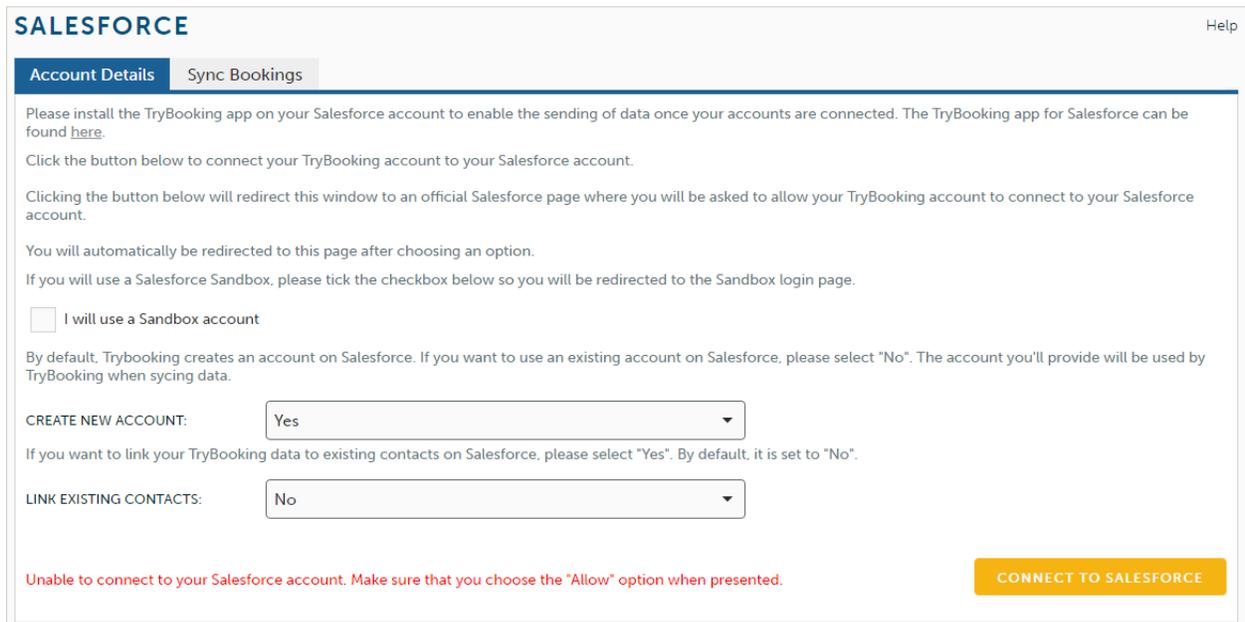
After Salesforce authentication when your account is successfully connected, a notification message will be displayed in the account details tab that your TryBooking account has been successfully connected to your Salesforce account. See Figure 2.3.1.



The screenshot shows the 'SALESFORCE' interface with a 'Help' link in the top right. The 'Account Details' tab is active, and the 'Sync Bookings' sub-tab is selected. The main content area contains the following text: 'Please install the TryBooking app on your Salesforce account to enable the sending of data once your accounts are connected. The TryBooking app for Salesforce can be found [here](#). To disconnect your TryBooking account from your Salesforce account, click the button below. If you will use a Salesforce Sandbox, please tick the checkbox below so you will be redirected to the Sandbox login page.' Below this is a checkbox labeled 'I will use a Sandbox account' which is unchecked. Further down, it says 'By default, Trybooking creates an account on Salesforce. If you want to use an existing account on Salesforce, please select "No". The account you'll provide will be used by TryBooking when syncing data.' There are two dropdown menus: 'CREATE NEW ACCOUNT:' with 'Yes' selected, and 'LINK EXISTING CONTACTS:' with 'No' selected. At the bottom, a message states 'Your TryBooking account has been successfully connected to your Salesforce account.' and a button labeled 'DISCONNECT FROM SALESFORCE' is visible on the right.

Figure 2.3.1 | Successful Login

When you click the  button after successful log in to Salesforce, this message will be displayed.



The screenshot shows the 'SALESFORCE' interface with a 'Help' link in the top right. The 'Account Details' tab is active, and the 'Sync Bookings' sub-tab is selected. The main content area contains the following text: 'Please install the TryBooking app on your Salesforce account to enable the sending of data once your accounts are connected. The TryBooking app for Salesforce can be found [here](#). Click the button below to connect your TryBooking account to your Salesforce account. Clicking the button below will redirect this window to an official Salesforce page where you will be asked to allow your TryBooking account to connect to your Salesforce account. You will automatically be redirected to this page after choosing an option. If you will use a Salesforce Sandbox, please tick the checkbox below so you will be redirected to the Sandbox login page.' Below this is a checkbox labeled 'I will use a Sandbox account' which is unchecked. Further down, it says 'By default, Trybooking creates an account on Salesforce. If you want to use an existing account on Salesforce, please select "No". The account you'll provide will be used by TryBooking when syncing data.' There are two dropdown menus: 'CREATE NEW ACCOUNT:' with 'Yes' selected, and 'LINK EXISTING CONTACTS:' with 'No' selected. At the bottom, a red error message states 'Unable to connect to your Salesforce account. Make sure that you choose the "Allow" option when presented.' and a yellow button labeled 'CONNECT TO SALESFORCE' is visible on the right.

Figure 2.3.2 | Denied Access to Salesforce Application

When your Salesforce account organization is not an enterprise edition, this message will be displayed.

The screenshot shows the Salesforce interface for connecting a TryBooking account. At the top, there are tabs for 'Account Details' and 'Sync Bookings'. The main content area contains instructions: 'Please install the TryBooking app on your Salesforce account to enable the sending of data once your accounts are connected. The TryBooking app for Salesforce can be found [here](#). Click the button below to connect your TryBooking account to your Salesforce account. Clicking the button below will redirect this window to an official Salesforce page where you will be asked to allow your TryBooking account to connect to your Salesforce account. You will automatically be redirected to this page after choosing an option. If you will use a Salesforce Sandbox, please tick the checkbox below so you will be redirected to the Sandbox login page.' There is a checkbox labeled 'I will use a Sandbox account' which is currently unchecked. Below this, a note states: 'By default, Trybooking creates an account on Salesforce. If you want to use an existing account on Salesforce, please select "No". The account you'll provide will be used by TryBooking when syncing data.' There are two dropdown menus: 'CREATE NEW ACCOUNT:' with 'Yes' selected, and 'LINK EXISTING CONTACTS:' with 'No' selected. At the bottom, a red error message reads: 'Unable to connect to your Salesforce account. Salesforce integration is only allowed for organizations using Salesforce Enterprise Edition.' A yellow button labeled 'CONNECT TO SALESFORCE' is positioned to the right of the error message.

Figure 2.3.3 | Non-enterprise Salesforce Account Organization

2.4 Create a New User (Optional)

You can create a new user for your account named TryBooking, so that the data you will sync from the TryBooking site to Salesforce will be owned and created by TryBooking.

The screenshot shows the 'TryBooking Event Detail' page for an event named 'Le Fantôme de l'Opéra - Musicale'. The page includes navigation links like 'Session Times (1)', 'Sections (3)', and 'Bookings (5)'. The event details are displayed in a table-like format: Name 'Le Fantôme de l'Opéra - Musicale', Owner 'TryBooking [Change]', Genre (blank), Created By 'TryBooking, 16/04/2014 1:39 PM', and Last Modified By 'TryBooking, 16/04/2014 1:39 PM'. There are 'Edit' buttons for the event name and the user information.

Figure 2.4.1 | TryBooking App Details – New User

To go to the Create New User page:

1. Click the **Setup** link located at the upper right corner of the Salesforce page
2. Click the down arrow beside the Manage Users link to bring down its menu
3. Click the Users link to display the user's setup
4. Click the **New User** button

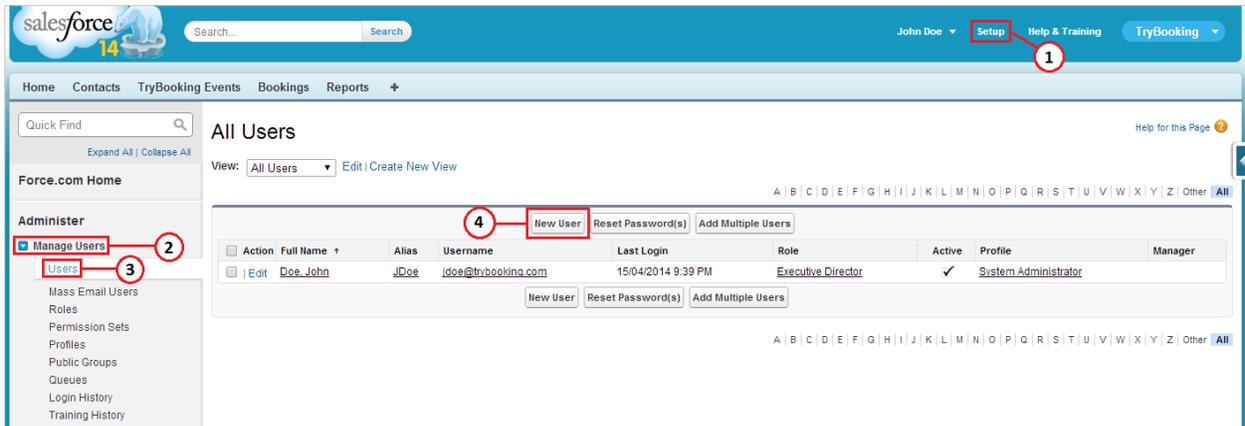


Figure 2.4.2 | TryBooking App Managed User

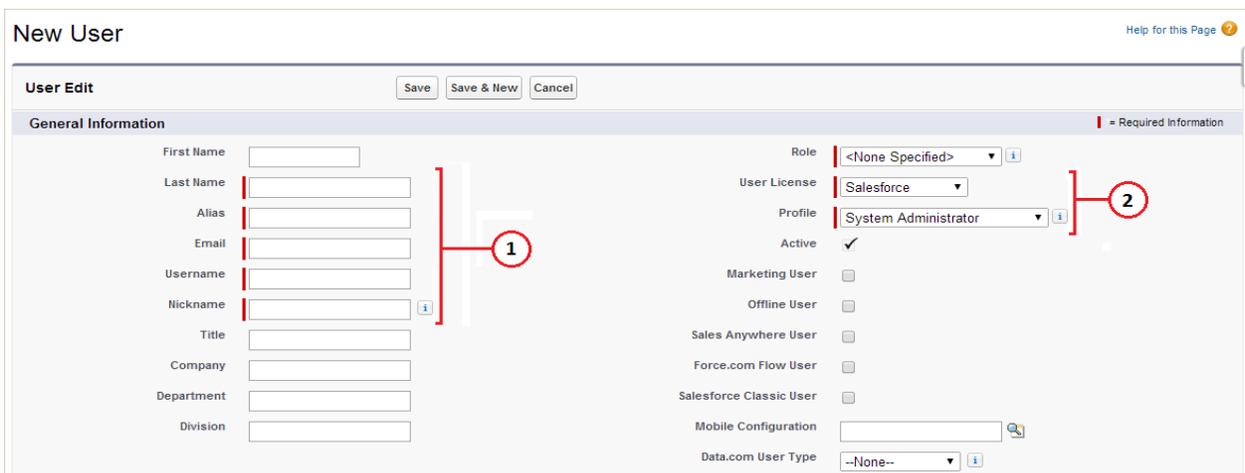


Figure 2.4.3 | TryBooking App New User Setup 1

On the New User setup page:

1. Fill in the required fields as indicated. We suggest making the First Name blank then put **TryBooking** on the Last Name.
2. Under the User License, select **Salesforce** then choose the Profile as **System Administrator**.
3. Check the **Generate new password and notify the user immediately** option.
4. Click the button to create a new user.

Figure 2.4.4 | TryBooking App New User Setup 2

Upon creating a new user, an email will be sent to your indicated address with the following details.

1. To login automatically, click the link provided by the email.

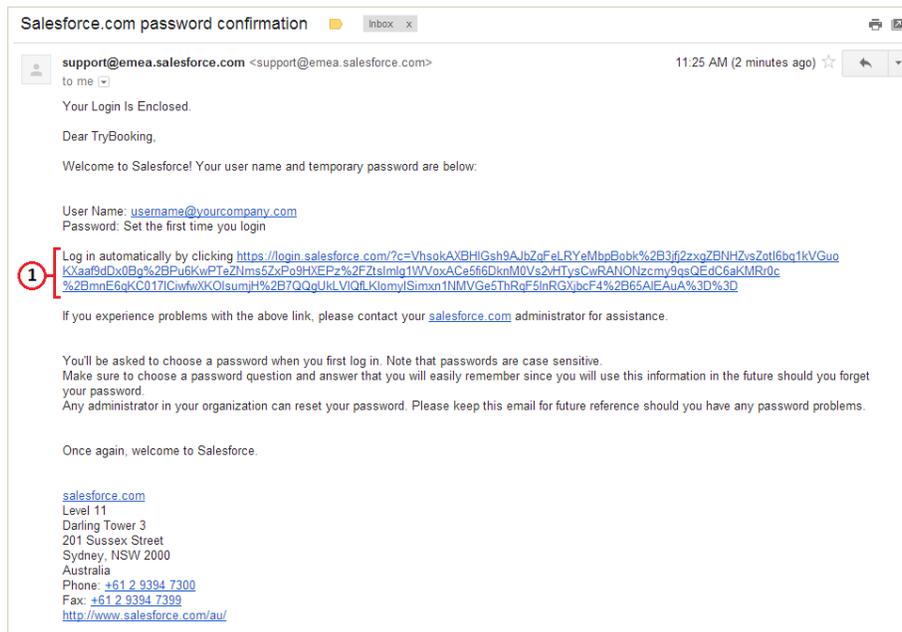


Figure 2.4.5 | Salesforce Password Confirmation Email

After clicking the link, you will be redirected to the Salesforce Change Password page. Enter your new password and your security question and answer, then click the **Save** button.

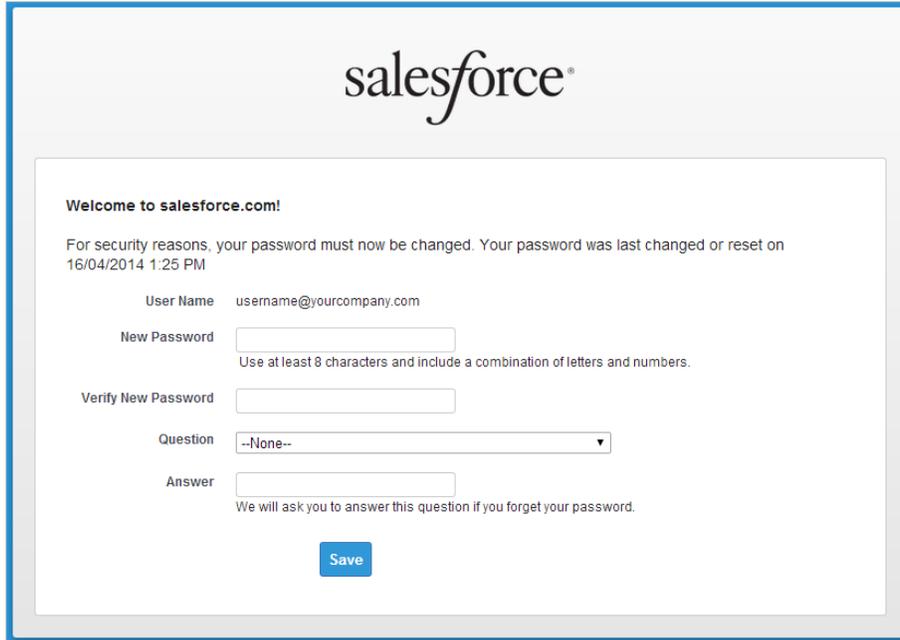


Figure 2.4.6 | Salesforce Change Password Page

You have now created a new user which can be used when connecting your TryBooking account to Salesforce.

3.0 BOOKING WITH SALESFORCE INTEGRATION

Once you have connected your TryBooking account with Salesforce, an account will be automatically created in your Salesforce account. The account name of the created account will be in this format: **TryBooking – [Account Name]**. [Account Name] refers to your TryBooking account name.



Figure 3.0.1 | Salesforce TryBooking Account

The ticket buyer’s contact details from TryBooking will be exported and saved as contacts under this account. If you delete this account all of your contacts will also be deleted. Subsequent contacts will be saved on the contacts tab without the account name.

Aside from ticket buyer’s contact details, event and booking details will also be exported to your account contacts after every successful booking. Managing your data will be further explained in **4.0 Getting to Know the TryBooking App**.

Note: If the TryBooking app is not installed in your Salesforce account or if a booking is a Quicksale, the ticket buyer’s contact, event and booking details will not be exported to your Salesforce account.

4.0 GETTING TO KNOW THE TRYBOOKING APP

After logging-in you can access the application by:

1. Clicking the Force.com App Menu on the upper right corner of your Salesforce account page, and then
2. Clicking on the TryBooking App

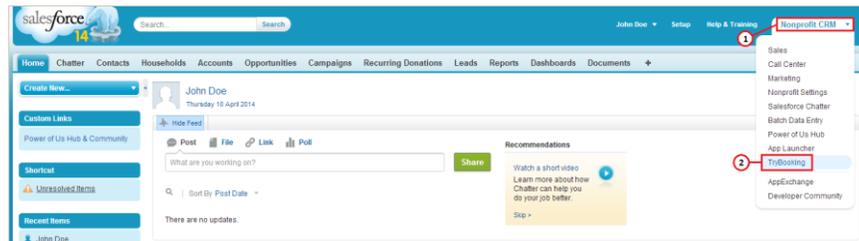


Figure 4.0.1 | Salesforce Home Page

In the application, there are five (5) available tabs on the menu bar (Home, Contacts, TryBooking Events, Bookings, and Reports). By default, the Booking tab is shown when accessing the TryBooking App. Other available tabs may be accessed by clicking the '+' beside the last tab.



Figure 4.0.2 | TryBooking App Tabs

4.1 Home Tab

This is where you will see your posts, calendar, tasks, and other objects that you have added.

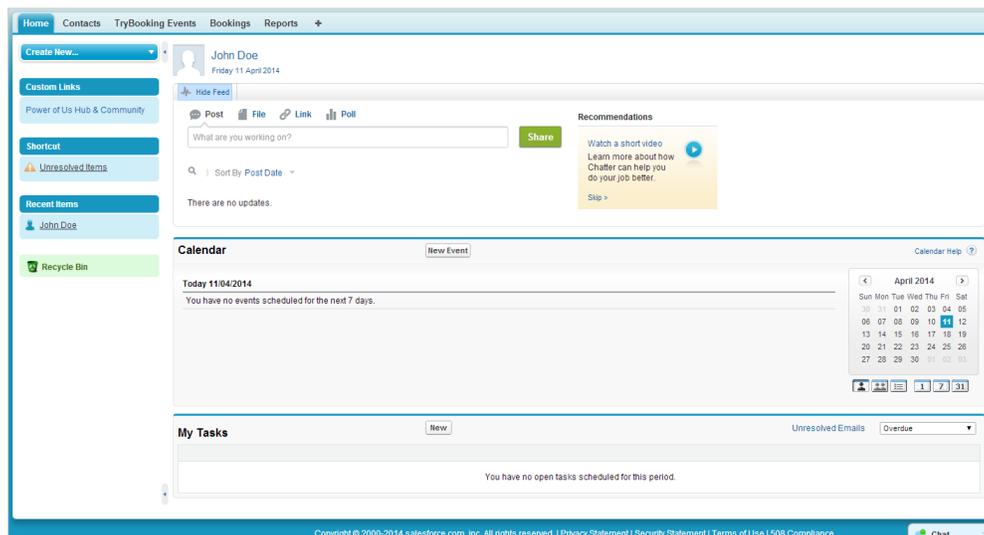


Figure 4.1.1 | TryBooking App Home Tab

4.2 Contacts Tab

On this tab's Home page, the recent contacts will be displayed together with contact reports and access for tools like sending mass emails. You can:

1. Add new contacts by clicking the **New** button
2. Create, edit, or delete views and display contacts based on the selected view on the view drop down list.
To go to selected view, click **Go!**

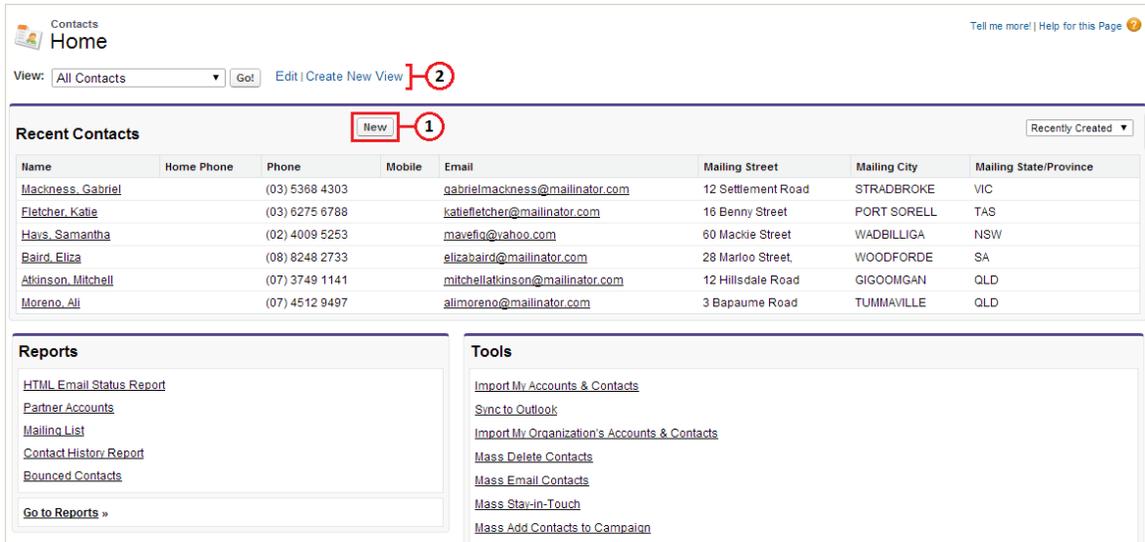


Figure 4.2.1 | TryBooking App Contacts Tab

On the view, you can:

1. Add a new contact
2. As well as edit or delete existing contacts.
3. When a contact is clicked, you will see the contact's details.

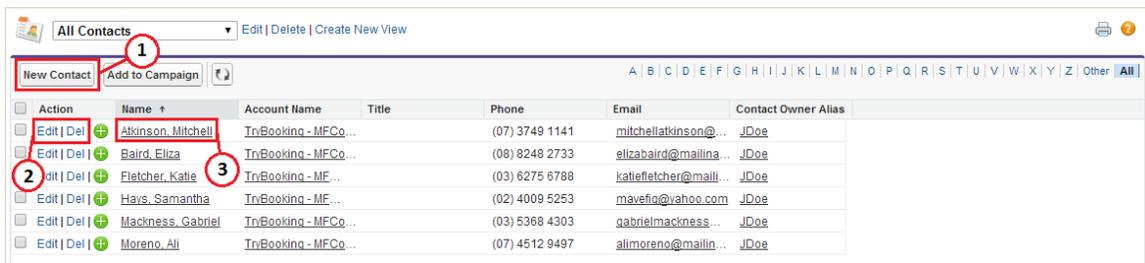


Figure 4.2.2 | TryBooking App Contacts View

You can also add the list of your bookings on the "Related Lists" area on the bottom of the page. To do this:

Click the **Edit Layout** link located on the upper right corner of the page.

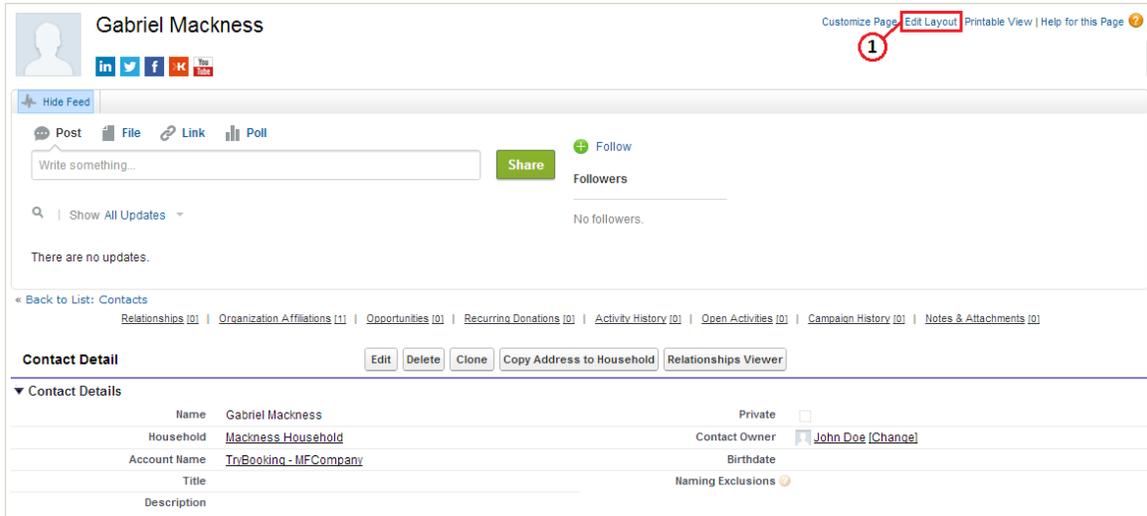


Figure 4.2.3 | TryBooking App Contacts View

In the Edit layout page, you can choose what fields, buttons, etc. you want to see in your contact's details. To add your contact's bookings:

1. Click Related Lists. It will hover to the Related List section.
2. Click and drag **Bookings** label located on the dialog box above the page to the Related List section (3).

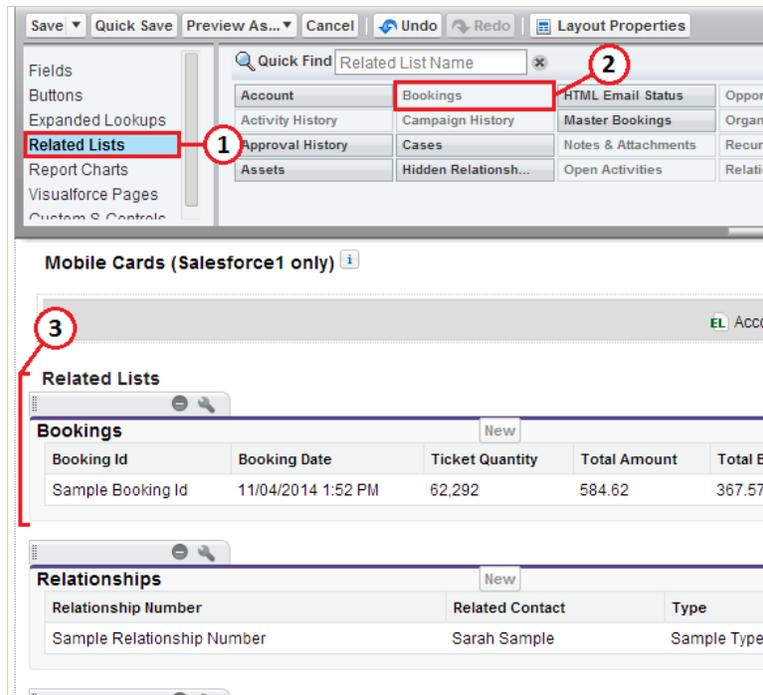


Figure 4.2.4 | TryBooking App Contacts Edit Layout

4.3 TryBooking Events Tab

Recent events are displayed on this tab's home page together with:

1. The **New** Event button for creating new events and
2. A drop down list for different views where links for creating or editing view is also located. Clicking the **Go!** button will display the events based on the selected view.



Figure 4.3.1 | TryBooking App Events Tab

On an Event View:

1. You can add a new TryBooking event by clicking the **New TryBooking Event** button,
2. Edit or delete events, and
3. Click on event name to see the details for that event.

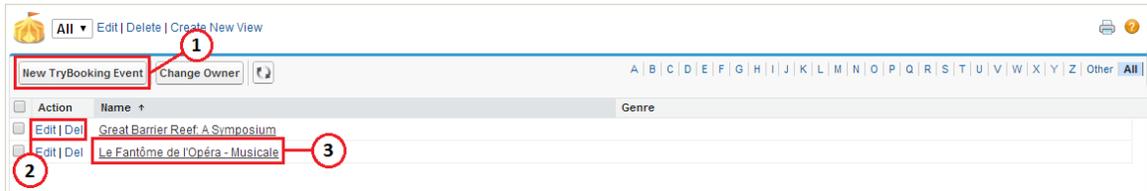


Figure 4.3.2 | TryBooking App Events View

When an event is clicked, you will see the event's details including related lists which are the **Session Times**, **Sections** and **Bookings** that are available under that event. Also in the event's detail, you can:

1. Click the Edit button to edit the event's name and assign or change its genre (See Figure 4.3.7)
2. See a more detailed view of Session Time by clicking on its name.
3. Also, the Section's details can be viewed by clicking its name. Bookings will be explained on section 4.4.

TryBooking Event
Le Fantôme de l'Opéra - Musicale
 < Back to List: TryBooking Events

Customize Page | Edit Layout | Printable View | Help for this Page ?

Session Times (1) | Sections (3) | Bookings (8)

TryBooking Event Detail

Name: Le Fantôme de l'Opéra - Musicale Owner: John Doe [Change]

Genre: _____

Created By: John Doe, 14/04/2014 3:47 PM Last Modified By: John Doe, 14/04/2014 3:47 PM

[Edit](#)

Session Times Session Times Help ?

Action	Session Time
Edit Del	One Night Only

Sections Sections Help ?

Action	Name
Edit Del	Stall
Edit Del	Lower Circle
Edit Del	Upper Circle

Bookings Bookings Help ?

Action	Booking Id	Booking Date	Contact Name	Ticket Quantity	Total Payment
Edit Del	66889c4f-f2f-49c9-bd3c-4a2a1cc28a26	8/04/2014 5:42 PM	Ali Moreno	1	\$370.00
Edit Del	f484fb24-4c65-4e95-a67c-569083f4efe0	8/04/2014 5:46 PM	Eliza Baird	3	\$690.00
Edit Del	3f42e69f-f13d-457e-8ff3-14bf854fb6a9	10/04/2014 11:36 AM	Ali Moreno	1	\$190.00

Figure 4.3.3 | TryBooking App Events Details

Upon clicking the session time, you will see its details which include the **Tickets**, **Donations** and **Box Office Fees**. Click any of the ticket names to see its details (1).

Session Time
One Night Only
 < Back to List: TryBooking Events

Customize Page | Edit Layout | Printable View | Help for this Page ?

Tickets (10) | Donations (1) | Box Office Fees (1)

Session Time Detail

Session Time: One Night Only Owner: John Doe [Change]

Event Name: Le Fantôme de l'Opéra - Musicale

Created By: John Doe, 14/04/2014 3:47 PM Last Modified By: John Doe, 14/04/2014 3:47 PM

Tickets Tickets Help ?

Action	Ticket Type Name	Booking Id	Section Name	Quantity	Total Payment
Edit Del	VIP	66889c4f-f2f-49c9-bd3c-4a2a1cc28a26	Stall	1	\$370.00
Edit Del	Standard	f484fb24-4c65-4e95-a67c-569083f4efe0	Lower Circle	1	\$250.00
Edit Del	Standard	f484fb24-4c65-4e95-a67c-569083f4efe0	Lower Circle	1	\$250.00
Edit Del	Concession	f484fb24-4c65-4e95-a67c-569083f4efe0	Lower Circle	1	\$190.00
Edit Del	Concession	3f42e69f-f13d-457e-8ff3-14bf854fb6a9	Upper Circle	1	\$190.00
Edit Del	Standard	daaca818-1e5a-4257-9975-107e6e7b4c82	Lower Circle	1	\$250.00
Edit Del	VIP	b7db8d25-74de-4bb9-8f6f-2aac39e630c9	Stall	1	\$370.00
Edit Del	Standard	5a4fe262-8f5a-4b57-ab5c-696cd9b407cb	Lower Circle	1	\$250.00
Edit Del	Concession	d3222d97-a2bc-4039-abce-7ad72e05c79d	Upper Circle	1	\$190.00
Edit Del	Standard	bc389846-3d4a-4fe1-a624-f75246f3391b	Stall	1	\$200.00

Show 1 more » | Go to list (11) »

Donations Donations Help ?

Action	Booking Id	Total Donation
Edit Del	bc389846-3d4a-4fe1-a624-f75246f3391b	\$75.00

Box Office Fees Box Office Fees Help ?

Action	Booking Id	Total Box Office Fee
Edit Del	bc389846-3d4a-4fe1-a624-f75246f3391b	\$100.00

Figure 4.3.4 | TryBooking App Session Time Details

The Ticket Detail page displays the details for that booked ticket including the Ticket Price, Discount, and other pertinent details. It also displays a related list for the Ticket Breakdown with its ticket number.

Ticket Detail

Ticket Type Name	Standard
Booking Id	bc389846-3d4a-4fe1-a624-f75246f3391b
Event Name	Le Fantôme de l'Opéra - Musicale
Session Time	One Night Only
Section Name	Stall
Ticket Price	\$250.00
Quantity	1
Discount	\$50.00
Applied Gift Certificate	\$0.00
Total Payment	\$200.00
Created By	John Doe, 14/04/2014 3:47 PM
Last Modified By	John Doe, 14/04/2014 3:47 PM

Ticket Breakdown

Action	Ticket Number
Edit Del	CEW-35644-33084

Figure 4.3.5 | TryBooking App Ticket Details

When a section name is clicked, it will display its details just like the session time.

Section Detail

Name	Stall	Owner	John Doe [Change]
Event Name	Le Fantôme de l'Opéra - Musicale		
Created By	John Doe, 10/04/2014 8:50 PM	Last Modified By	John Doe, 10/04/2014 9:53 PM

Tickets

Action	Ticket Type Name	Booking Id	Session Time	Quantity	Total Payment
Edit Del	Group	ea058db0-4d1c-4bae-9448-a25592164e77	One Night Only	8	1,200.00
Edit Del	VIP	66889c4f-f2f-49c9-bd3c-4a2a1cc28a26	One Night Only	1	370.00
Edit Del	VIP	82cbabf9-37d2-488f-83b0-b827eb912e49	One Night Only	1	370.00

Figure 4.3.6 | TryBooking App Section Details

You can add a specific **Genre** to your event. To do this, click **Edit** button on the event details then:

1. Enter any genre you want for your event then
2. Click the **Save** button.



Figure 4.3.7 | TryBooking App Event Edit - Genre

4.4 Bookings Tab

Same as the functionalities on the Events tab, the recent bookings are viewed here. You can also:

1. Create a new booking by clicking **New** button or
2. Create, edit, or delete views for bookings.

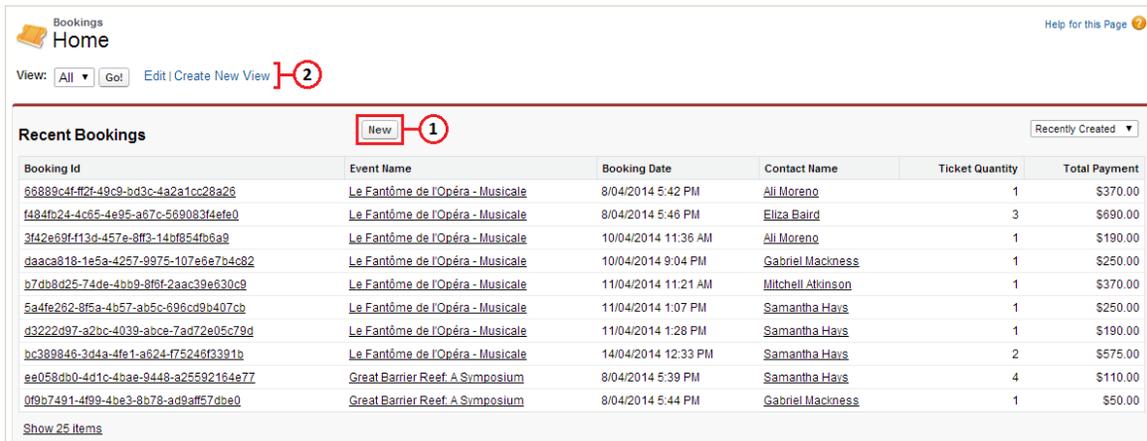


Figure 4.4.1 | TryBooking App Bookings Home

When a booking is clicked, you will see the booking's general details and all other details of the booking.

Booking
bc389846-3d4a-4fe1-a624-f75246f3391b

Customize Page | Edit Layout | Printable View | Help for this Page

< Back to List: TryBooking Events

Tickets (2) | Box Office Fees (1) | Donations (1)

Booking Detail

Booking Id: bc389846-3d4a-4fe1-a624-f75246f3391b Owner: John Doe [Change]

Event Name: Le Fantôme de l'Opéra - Musicale

Booking Date: 14/04/2014 12:33 PM

Contact Name: Samantha Hays

Ticket Quantity: 2

Total Payment: \$575.00

Created By: John Doe, 14/04/2014 3:47 PM Last Modified By: John Doe, 14/04/2014 3:47 PM

Tickets

Action	Ticket Type Name	Session Time	Section Name	Quantity	Total Payment
Edit Del	Standard	One Night Only	Stall	1	\$200.00
Edit Del	Standard	One Night Only	Stall	1	\$200.00

Box Office Fees

Action	Session Time	Total Box Office Fee
Edit Del	One Night Only	\$100.00

Donations

Action	Session Time	Total Donation
Edit Del	One Night Only	\$75.00

Figure 4.4.2 | TryBooking App Booking Details

4.5 Reports Tab

This is where you can generate reports to keep track of your needed information. In this page, you can:

1. Create a new report by clicking the **New Report...** button.
2. Generate a pre-installed report made for TryBooking by clicking the report name (3) (See Figure 4.5.2)

Reports & Dashboards

[New Report...](#) [New Dashboard...](#)

TryBooking

Find reports and dashboards...

All Folders

- Unfiled Public Reports
- My Personal Custom Reports
- My Personal Dashboards
- Household Reports (Installed Package: Hou...
- Nonprofit Edition Reports (Installed Package...
- NPSF Donor Management Dashboard
- NPSF Donor Management Reports
- NPSF Grants Management Dashboard
- NPSF Grants Management Reports
- NPSF Membership Management Dashboard
- NPSF Membership Management Reports
- TryBooking**
- Sales Reports
- Lead Reports
- Support Reports
- Self-Service Reports
- Product and Asset Reports
- Call Center Reports
- Account and Contact Reports
- Opportunity Reports
- Campaign Reports
- Administrative Reports
- Activity Reports

Action	Name	Folder
Event Bookings	Bookings grouped by Event	TryBooking
Event Contacts	Contacts grouped by Event	TryBooking
Genre Bookings	Bookings grouped by Genre and Event <small>*All Events without genre will be under one group.</small>	TryBooking
Genre Contacts	Contacts grouped by Genre and Events <small>*All Events without genre will be under one group.</small>	TryBooking

1-4 of 4

Page 1 of 1

Figure 4.5.1 | TryBooking App Reports Tab

 **Event Bookings**

Report Generation Status: Complete

Report Options:

Summarize information by: Show

Time Frame

Date Field: Range:
 From: To:

Booking Id	Booking Date	Contact Name: Full Name	Ticket Quantity	Total Payment
<input type="checkbox"/> Event Name: <u>Great Barrier Reef: A Symposium</u> (7 records)				
ee058db0-4d1c-4bae-9448-a25592164e77	8/04/2014 5:39 PM	Samantha Hays	4	\$110.00
0f9b7491-4f99-4be3-8b78-ad9aff57d8e0	8/04/2014 5:44 PM	Gabriel Mackness	1	\$50.00
4c41e8bd-6723-4ab4-8f09-c3a7241a366e	8/04/2014 5:48 PM	Katie Fletcher	3	\$100.00
82cbaf9-37d2-488f-83b0-b827eb912e49	8/04/2014 5:50 PM	Mitchell Atkinson	1	\$50.00
43e01549-7278-4794-a9d2-5ed9e91091f1	11/04/2014 11:07 AM	Eliza Baird	1	\$50.00
d3f09bb8-c52d-42a9-880a-35b1e502b763	11/04/2014 11:37 AM	Samantha Hays	2	\$75.00
bf8d3a66-b35b-4ae7-a52c-9b8e743cab02	11/04/2014 1:16 PM	Samantha Hays	4	\$110.00
<input type="checkbox"/> Event Name: <u>Le Fantôme de l'Opéra - Musicale</u> (8 records)				
66889c4f-ff2f-49c9-bd3c-4a2a1cc28a26	8/04/2014 5:42 PM	Alli Moreno	1	\$370.00
f484fb24-4c65-4e95-a67c-569083f4efe0	8/04/2014 5:46 PM	Eliza Baird	3	\$690.00
3f42e69f-f13d-457e-8ff3-14bf854fb6a9	10/04/2014 11:36 AM	Alli Moreno	1	\$190.00
daaca818-1e5a-4257-9975-107e6e7b4c82	10/04/2014 9:04 PM	Gabriel Mackness	1	\$250.00
b7db8d25-74de-4bb9-8ff6-2aac39e630c9	11/04/2014 11:21 AM	Mitchell Atkinson	1	\$370.00
5a4fe262-8f5a-4b57-ab5c-696cd9b407cb	11/04/2014 1:07 PM	Samantha Hays	1	\$250.00
d3222d97-a2bc-4039-abce-7ad72e05c79d	11/04/2014 1:28 PM	Samantha Hays	1	\$190.00
bc389846-3d4a-4fe1-a624-f75246f3391b	14/04/2014 12:33 PM	Samantha Hays	2	\$575.00
Grand Totals (15 records)				

Check rows to filter, then drill down by:

Figure 4.5.2 | TryBooking App Generated Report

5.0 SYNC BOOKINGS

Once you have connected your TryBooking account with your Salesforce account and installed the TryBooking app in Salesforce, you can sync bookings made for all events or a specific event to your Salesforce.

To sync your bookings with your Salesforce account, click on the Salesforce link on the account dashboard under the configuration section and then click on the Sync Bookings Tab. Make sure that you have already connected your TryBooking account with your Salesforce account, if not, a validation message will be display as shown in Figure 5.0.2.

 **CONFIGURATION**

Homepage template	Event listing
Venue templates	Gift certificate
Pricing group templates	Ticket styles
Data collection templates	Options
Basic access users	Salesforce

Figure 5.0.1 | Salesforce Link

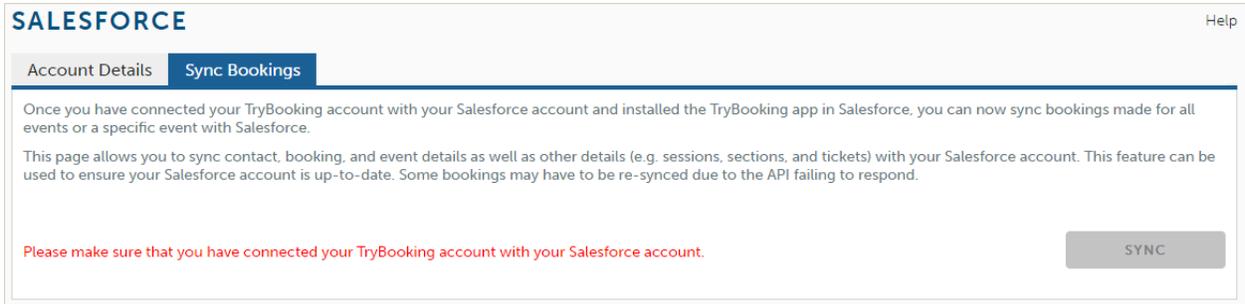


Figure 5.0.2 | TryBooking Account not connected to Salesforce Account

Aside from connecting your TryBooking account with your Salesforce account you should install the TryBooking app to sync your bookings with your Salesforce account. Otherwise, a validation message will be displayed indicating that you need to install TryBooking app in your Salesforce account, see Figure 5.0.3.

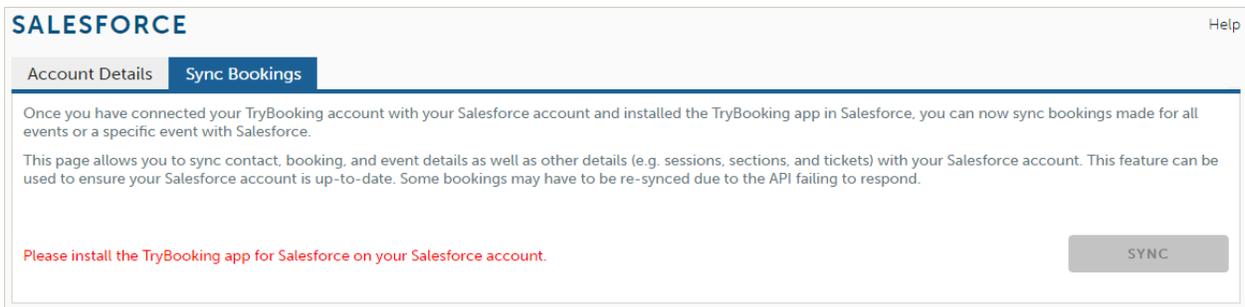


Figure 5.0.3 | TryBooking app is not installed

You can sync bookings made for a specific event, select Event Name from dropdown list, and then check All Bookings if you want to sync all bookings, if not, specify a date range, see Figure 5.0.4.

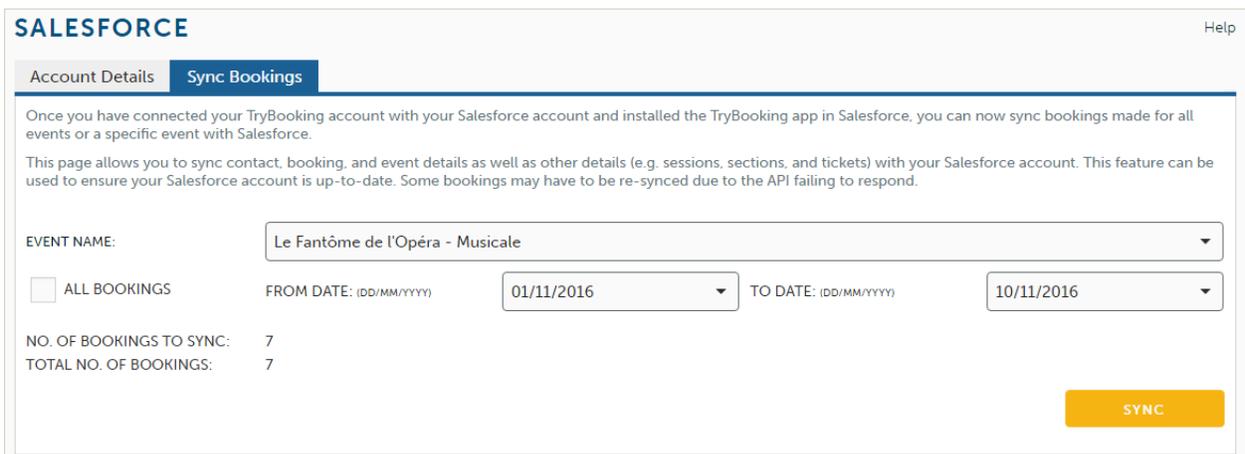


Figure 5.0.4 | Sync Bookings made for Specific Event

If you want to sync all bookings made for all events, select All Events from dropdown list and specify a date range to sync with your Salesforce account.

SALESFORCE Help

Account Details **Sync Bookings**

Once you have connected your TryBooking account with your Salesforce account and installed the TryBooking app in Salesforce, you can now sync bookings made for all events or a specific event with Salesforce.

This page allows you to sync contact, booking, and event details as well as other details (e.g. sessions, sections, and tickets) with your Salesforce account. This feature can be used to ensure your Salesforce account is up-to-date. Some bookings may have to be re-synced due to the API failing to respond.

EVENT NAME:

ALL BOOKINGS FROM DATE: (DD/MM/YYYY) TO DATE: (DD/MM/YYYY)

NO. OF BOOKINGS TO SYNC: 11
TOTAL NO. OF BOOKINGS: 11

SYNC

Figure 5.0.5 | Sync Bookings made for All Events

Note: If no bookings were made for the specified event or date range, the Sync button will be disabled.

Upon clicking the **Sync** button a notification message will be displayed, indicating that the sync operation is currently processing as shown in Figure 5.0.5. Once the sync operation is complete a notification email will be sent to you. See Figure 5.0.6 for the sample email. It contains number of bookings to sync and number of bookings synced.

SALESFORCE Help

Account Details **Sync Bookings**

Once you have connected your TryBooking account with your Salesforce account and installed the TryBooking app in Salesforce, you can now sync bookings made for all events or a specific event with Salesforce.

This page allows you to sync contact, booking, and event details as well as other details (e.g. sessions, sections, and tickets) with your Salesforce account. This feature can be used to ensure your Salesforce account is up-to-date. Some bookings may have to be re-synced due to the API failing to respond.

EVENT NAME:

ALL BOOKINGS FROM DATE: (DD/MM/YYYY) TO DATE: (DD/MM/YYYY)

NO. OF BOOKINGS TO SYNC: 14
TOTAL NO. OF BOOKINGS: 14

Processing Sync. An email notification will be sent to you when the sync is complete. **SYNC**

Figure 5.0.6 | Processing Sync

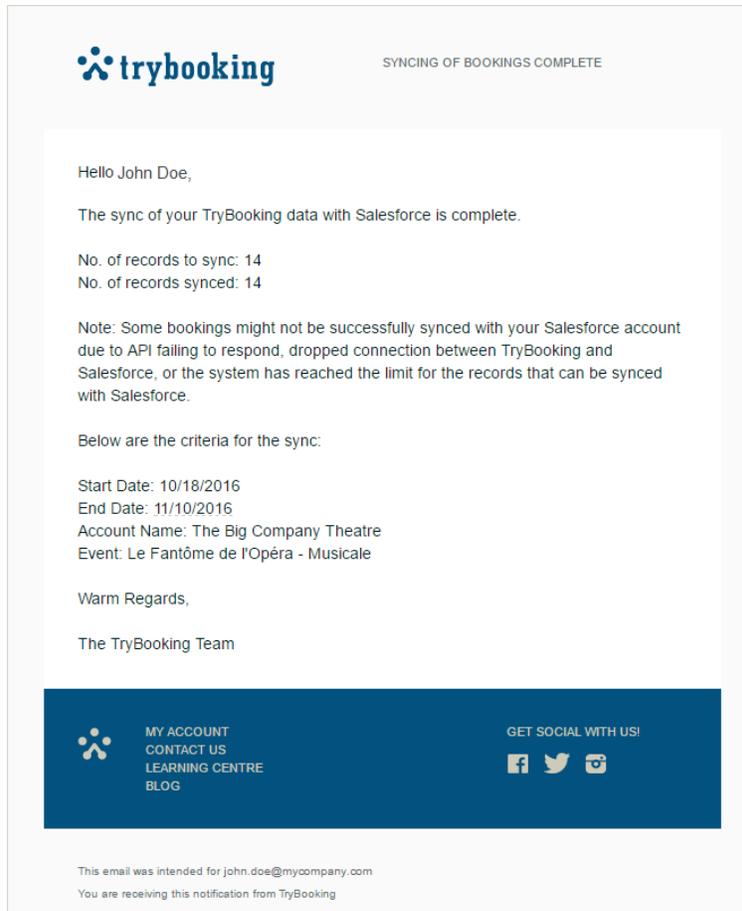


Figure 5.0.7 | Sync Bookings Email Notification

Note: Some bookings might not be successfully synced with your Salesforce account due to API failing respond, dropped connection between TryBooking and Salesforce, or system has reached the limit for the records that can be synced with Salesforce.

6.0 DISCONNECTING YOUR TRYBOOKING ACCOUNT

You can disconnect your account from Salesforce so that your booking data are no longer sent to Salesforce. Note that disconnecting your account will not delete the booking data in your Salesforce account. There are two ways to disconnect your account to Salesforce:

1. Disconnect thru the TryBooking site
2. Revoke Connected Apps thru the Salesforce site

6.1 Disconnect thru the TryBooking Site

To disconnect thru the TryBooking site, login to your account the go to the Salesforce Details page. Click the  button.

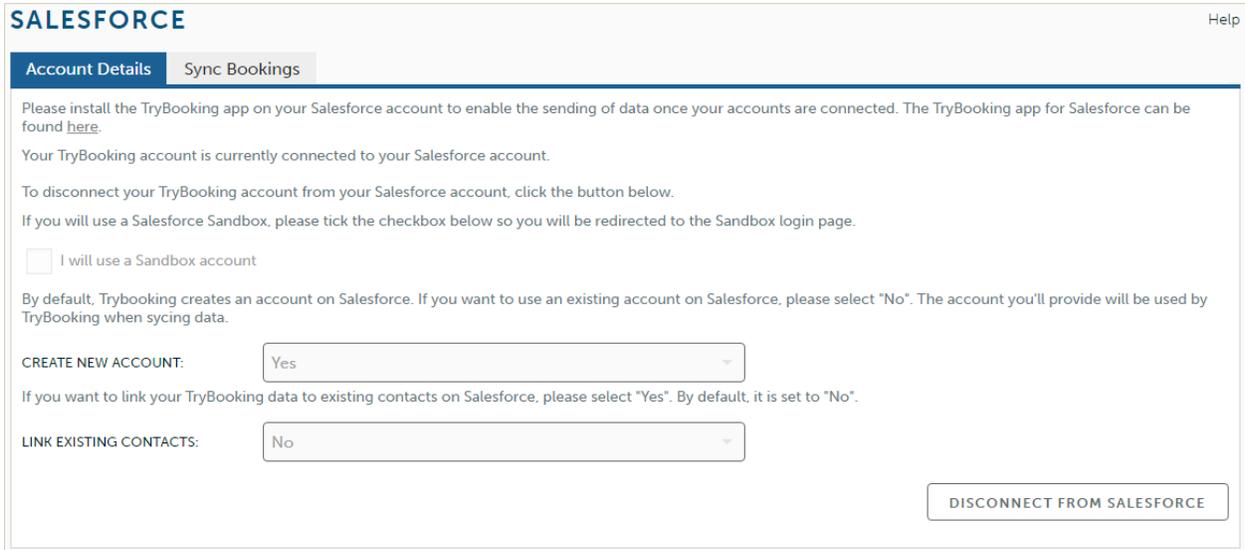


Figure 6.1.1 | TryBooking Site Disconnect from Salesforce

Upon clicking the button, a popup will appear to confirm your action. Click OK to disconnect your account from Salesforce.

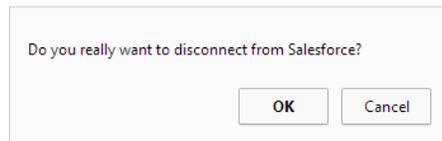


Figure 6.1.2 | TryBooking Site Disconnect Pop-up

A confirmation message will appear to indicate that your account is successfully disconnected.

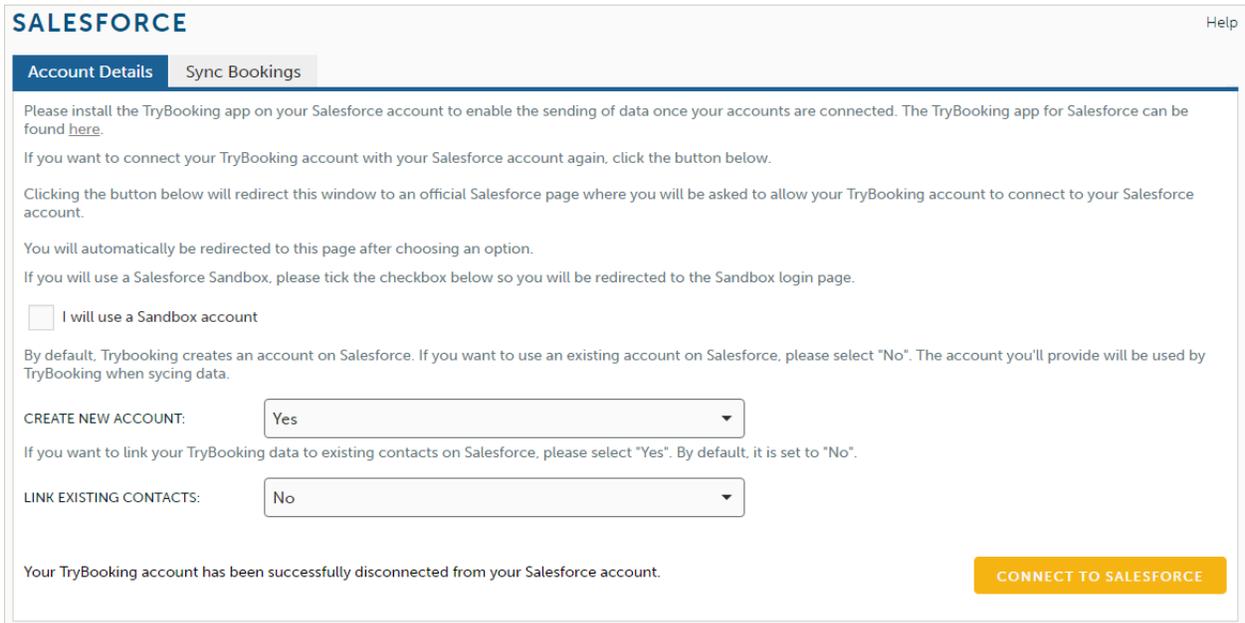


Figure 6.1.3 | TryBooking Site Disconnect Success

6.2 Revoke Connected Apps thru the Salesforce Site

To revoke connected app thru the Salesforce site, login to your Salesforce account then:

1. Click the down arrow next to your name
2. From the menu under your name, click My Settings

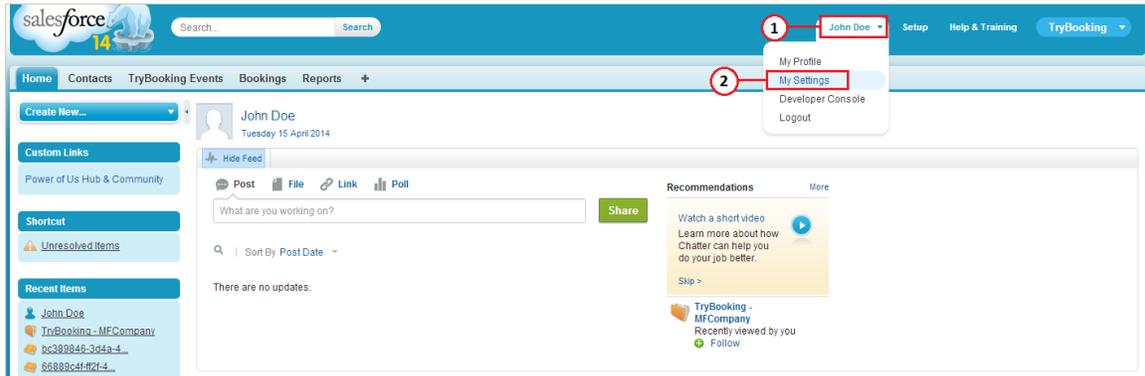


Figure 6.2.1 | Salesforce Site Revoke Step 1

On My Settings,

1. Click Personal then
2. Click Advanced User Details

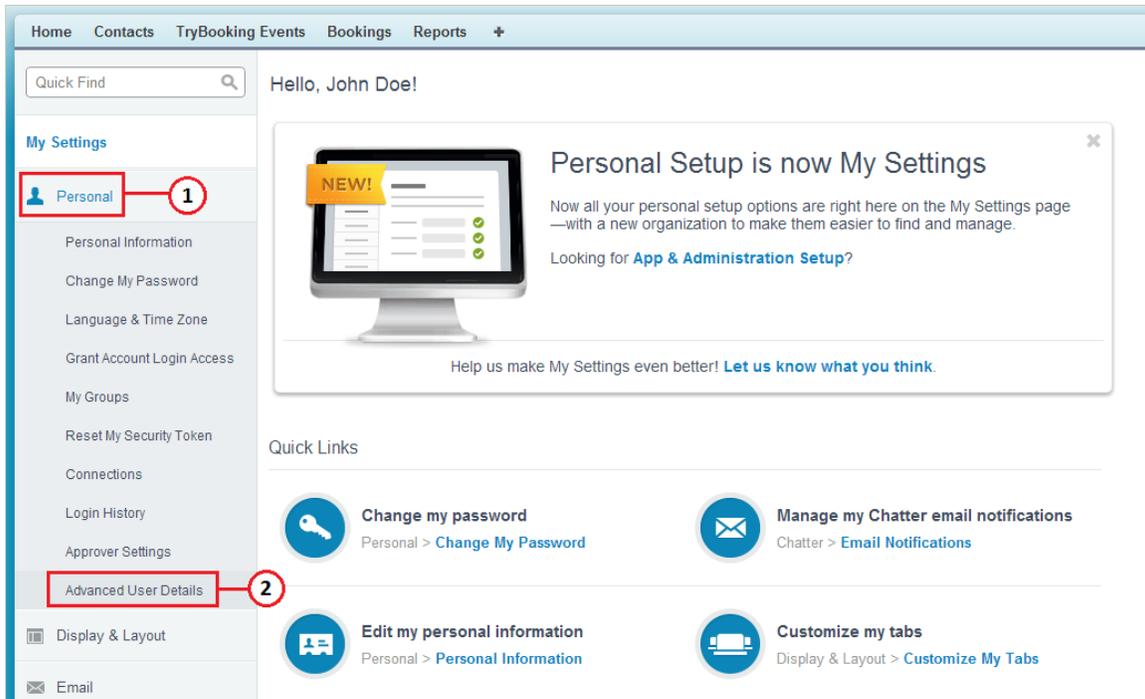


Figure 6.2.2 | Salesforce Site Revoke Step 2

On the Advanced User Details, scroll down until you see the OAuth Connected Apps section. Click the [Revoke](#) link to revoke/disconnect your account to Salesforce.



Action	Created Date	Last Used	Application	Use Count
Revoke	15/04/2014 5:03:24 PM	15/04/2014 5:03:27 PM	TryBooking App	1

Figure 6.2.3 | Salesforce Site Revoke Step 3

A popup will appear to confirm your action. Click OK to revoke/disconnect your account from Salesforce.



Figure 6.2.3 | Salesforce Site Revoke Pop-up

Your account is now successfully disconnected from Salesforce.