



Installation & Customization Guide

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Installing ActevaRSVP in Salesforce

ActevaRSVP runs only in Salesforce Professional, Enterprise or Unlimited edition. If you have Professional edition, make sure that it has the Campaign option. You also need administration permission to install ActevaRSVP.

Make sure that you have enough tabs and custom objects to install ActevaRSVP. ActevaRSVP needs two tabs and includes ten custom objects. The **Salesforce User Guide** has a table listing the tab and custom object limits for each Salesforce Edition. The table, titled **Salesforce Editions and Limits**, is in the Develop chapter of the **Salesforce User Guide**.

You can limit access to ActevaRSVP to certain user profiles. We recommend setting up the profiles before installing ActevaRSVP, if you want to limit access.

Installing ActevaRSVP is quick and easy:

1. Go to the Appexchange and log in with your Salesforce Administrator credentials.
2. Go to the ActevaRSVP listing on the AppExchange. Click the red **Get It Now** button.
3. Read the Terms and Conditions. Click the red **Install** button if you agree to the terms.
4. Follow the installation instructions, clicking the red **Continue** button. Click **Next** and choose the security level. You can specify what profiles have access to ActevaRSVP at this point.
5. Click **Next**, then click the **Install** button to start installation.
6. **Important:** Make sure that you click the **Deploy Now** button, then the **Deploy** button to complete the installation.

You will now see **ActevaRSVP** as a new choice in your force.com apps drop down list in the upper right side of Salesforce.

You can use ActevaRSVP once installation is complete. Your Salesforce Administrator will need to change Contact and Lead page layouts to make RSVP activity lists visible on those records. See [Adding the RSVP Activity Record List to Contact and Lead Pages](#) below for details about adding RSVP activity lists to Contacts and Leads.

Feel free to contact us at any point before, during or after the installation process.

Or, get started right away by Clicking on the RSVP Manager tab. Simply follow the instructions in the QuickStart Guide or read the Printable User Guide inside the Help Center (available at the bottom of the RSVP Manager page).

Adding the RSVP Activity List to Contact and Lead Pages

ActevaRSVP creates an RSVP activity for a contact or lead when that person is sent an invitation, opens an invitation, registers for or declines an RSVP event. The RSVP activity records appear in their own related list, which requires editing the contact and lead page layouts to add the RSVP Activity related list. The steps below show how to add the RSVP Activity list to the Contact page:

1. Click the **Setup** link at the top of a Salesforce page.
2. Find the **App Setup** section and expand the Customize menu (click the +).
3. Expand the Contacts menu under Customize.
4. Find the **Page Layouts** link and click it. The page should look like this:

1. Click **Setup** link

2. Open Customize menu

3. Open Contacts menu

4. Click **Page Layouts** link

5. Edit page layout

Page Layout Name	Created By	Modified By
Edit Del Contact (Marketing) Layout	Richard Cunningham, 3/16/2006 2:31 PM	Richard Cunningham, 6/19/2008 2:51 PM
Edit Del Contact (Sales) Layout	Richard Cunningham, 3/16/2006 2:31 PM	Richard Cunningham, 6/19/2008 2:51 PM
Edit Del Contact (Support) Layout	Richard Cunningham, 3/16/2006 2:31 PM	Richard Cunningham, 6/19/2008 2:51 PM
Edit Del Contact Layout	Richard Cunningham, 3/16/2006 2:31 PM	Richard Cunningham, 6/19/2008 2:51 PM

5. Click the **Edit** link next to the page layout you want to change.
6. Choose **Related Lists** from the menu in the upper left corner.
7. Find the Related List labeled "Contact RSVP Activities". You can roll your mouse over a label to see the full name of the list.

8. Drag the “Contact RSVP Activities” list to the Related List Section on the page layout. Drop the list where you want it to go in the related lists, as shown below.

1. Choose **Related Lists**

2. Drag "Contact RSVP Activities" to where you want it in related lists

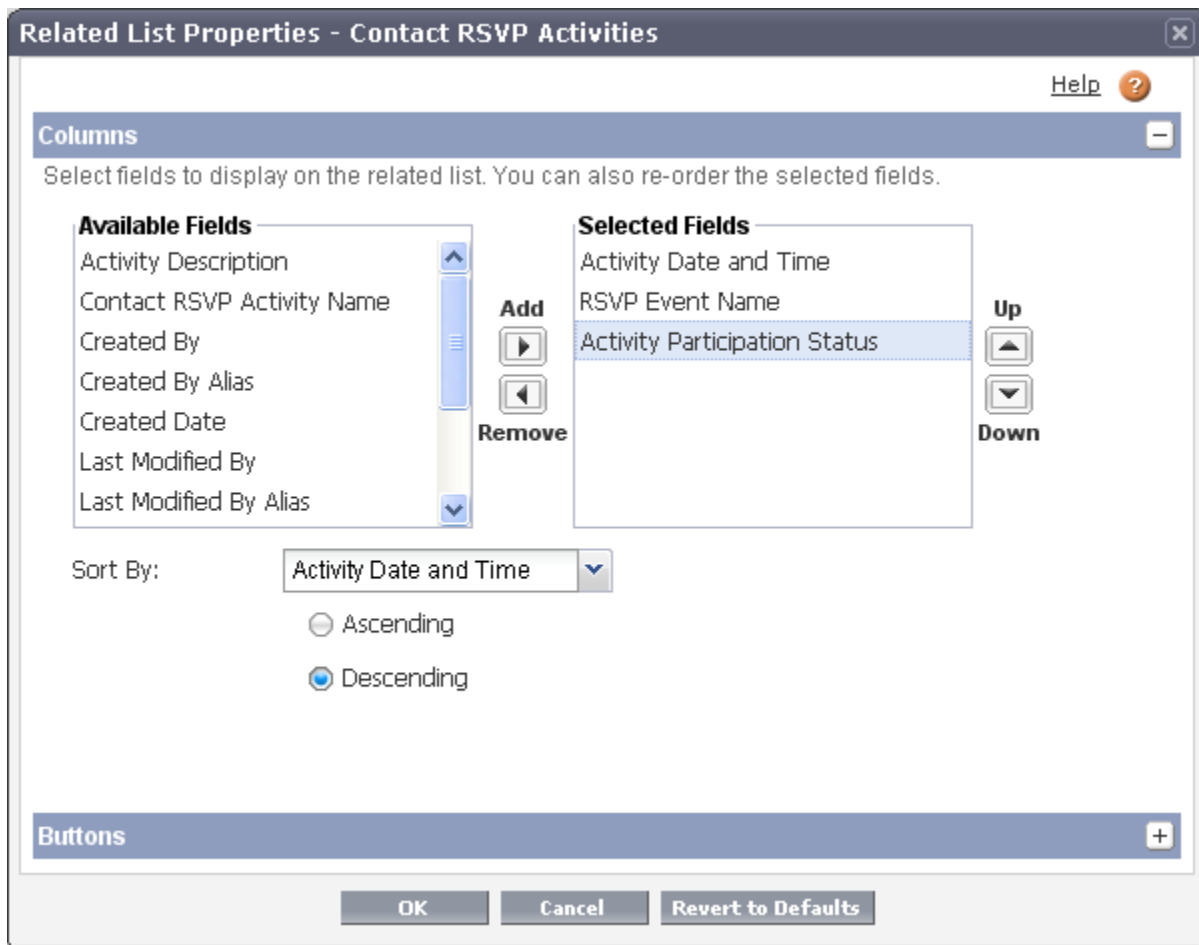
3. Click to change list properties

Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Sample Subject	Sample Related To	✓	3/10/2009 10:43 AM	Sarah Sample	3/10/2009 10:43 AM

Campaign Name	Start Date	Type	Status	Responded	Member Status Updated
Sample Campaign Name	3/10/2009	Sample Type	Sample Status	✓	3/10/2009 10:43 AM

9. Click the Properties icon on the Contact RSVP Activities related list tab. The “Related List Properties - Contact RSVP Activities” window will open.

10. Add “Activity Date and Time”, “RSVP Event Name” and “Activity Participation Status” to the **Selected Fields** list. Remove the “Contact RSVP Activity Name”. Select “Activity Date and Time” in the **Sort By** selection and check the Descending box to put the most recent activities at the top. The “Edit Related List” window should look like this:



11. Click **OK** to save the related list changes. Click the **Save** button to save the Contact page layout.

Repeat the steps above for Leads. Expand the Leads menu in step 3, and follow the same steps for Leads through step 11.

Introduction to ActevaRSVP Customization

You can customize ActevaRSVP from the Administration page, accessed by clicking the Administration button in the lower right corner of the RSVP Manager tab:

RSVP Manager Home [Help for this Page](#)

Set Up and Manage an RSVP Event

1. [Create an RSVP Event Venue, or Choose an existing RSVP Event Venue](#) (optional)
2. [Create an RSVP Event, or Choose an existing RSVP Event](#)
3. Preview Registration Web Page after choosing an RSVP Event

Choose an existing RSVP Event to ...

4. Create an invitation list or add Invitees
5. [Create an RSVP Email Template, or Choose an existing RSVP Email Template](#)
6. Send RSVP Group Email to Invitees
7. Take RSVP Event Attendance

Track Registration Information

8. [Run a Report](#) to track event participation and answers to RSVP Questions

About ActevaRSVP

[QuickStart](#) [Help Center](#) [Subscribe Now](#) [Overview](#) [Administration](#)

Click **Administration** button to start customizing ActevaRSVP

Clicking the button displays the Administration page:

ActevaRSVP Administration [Help for this Page](#)

ActevaRSVP Customization Options

Choose Color Scheme for Registration and Acknowledgement Pages
[Color selection page](#)

Choose a Queue for Leads Generated by ActevaRSVP
ActevaRSVP creates a lead for each invitee that changes their contact information on the registration form as well as for each invited friend. The person who creates the RSVP Event owns these leads by default. If you want these leads to instead go into a queue, please choose that queue below.

[Select Queue](#) [Previous](#)

Choose a Template for Registration Acknowledgement
ActevaRSVP sends an acknowledgement email when a participant registers for an event. You can specify an email template that you have created for the acknowledgement message, or choose "--- No Acknowledgement ---" to disable registration acknowledgement.

[Select Template](#) [Previous](#)

Customization – Changing Colors on Registration Pages

Click the [Color selection page](#) link to start customizing the color scheme of your registration pages. You can customize colors three different ways:

- Choose from six colors on the Color Selection page
- Open a color picker to pick from over 200 colors
- Enter color codes (RGB hexadecimal)

The page image below shows each of these options.

The screenshot shows a web interface for color selection. At the top, there's a blue header with 'Color Selection' on the left and 'Help for this Page ?' on the right. Below the header, a paragraph instructs the user to choose a color from a list or enter custom colors. The main content area is divided into several sections:

- Color Selection List:** A vertical list of six 'Registration' buttons in different colors: blue, green, dark blue, red, grey, and black. A callout box points to this list with the text: 'Choose one of these six colors -- or -- Click the color wheel to pick from 200 colors -- or -- Enter a color code (RGB hex)'. Below this list is a section for 'Enter or pick your own colors:' with input fields for 'Heading Color' and 'Shading Color', each with a color wheel icon, and a 'Show' button. A callout box points to the 'Show' button with the text: 'Click the Show button to see entered color codes'.
- Chosen Color Preview:** A section on the right showing a preview of the chosen color scheme. It includes fields for 'Event Name' (Company Event), 'Hosted By' (Host Company), 'Date, Time and Location' (When: February 14, 2008, 4:00 PM; February 14, 2008, 6:00 PM; Where: Your Favorite Venue, 1234 Enterprise Way, Anytown, US 99999), and 'Event Details' (a text area for a detailed description).
- Registration Form:** A section at the bottom right with input fields for 'First Name', 'Last Name', 'Company', and 'Email'.
- Navigation:** At the bottom left, there are 'Previous' and 'Done' buttons. A callout box points to the 'Done' button with the text: 'Click the Done button to apply the colors to pages'.

Choosing or picking a color immediately shows the color scheme in the preview on the right side of the page. Click the **Show** button after entering color codes to see them in the preview. When you are satisfied with the colors, click the **Done** button to apply the color changes to your registration pages.

Customization – Registration Acknowledgement Email

When an invitee registers for an RSVP event, ActevaRSVP sends an email to the invitee acknowledging their registration. You can customize this acknowledgement email by creating a template for it in ActevaRSVP. The ActevaRSVP Administration page includes a section where you can choose your custom acknowledgement template.

All RSVP event registrations send acknowledgement email based on the template selected on the administration page. Therefore, you should make the acknowledgment template work with any RSVP event by using merge fields to show specific information about the event.

Here is an example of a simple acknowledgement template that includes the participant's name, as well as the RSVP event name.

Dear {!RSVP_Participant_First_Name},

You have registered for {!RSVP_Event_Name}

We look forward to seeing you!

You can use the Mail Merge field in the acknowledgment template to provide information to the participant only after he or she registers for the event. For example, an organization uses ActevaRSVP to register people for webinars. The organization wants to provide the webinar access information only after someone has registered for the webinar. They put the webinar link and access instructions in the Mail Merge field on the RSVP Event page. Then they include the Mail Merge field {!RSVP_Mail_Merge} in the acknowledgment template on a line by itself. When someone registers for the event, that person gets an email that tells him or her how to access the webinar.

The acknowledgement email always comes from the owner of the RSVP Event. If you want to change the RSVP Event owner, you will first need to add the Owner field to the RSVP Event page layout by following the steps below:

1. Click the **Setup** link at the top of a Salesforce page.
2. Find the **App Setup** section and expand the Create menu (click the +).
3. Click **Objects** under the Create menu. A list of custom objects appears in the main right pane.

- Find the label RSVP Event and click on it. The segment below the Salesforce tabs should look like this:

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
- Build
 - Apps
 - Objects
 - Tabs
 - S-Controls
 - Report Types
 - Code
 - Email Services
 - Tools
- Exchange
- Integrate

Administration Setup

Custom Object
RSVP Event (Managed) [Help for this Page](#)

Below is the information for the custom object. Click [Edit](#) to change the custom object.

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

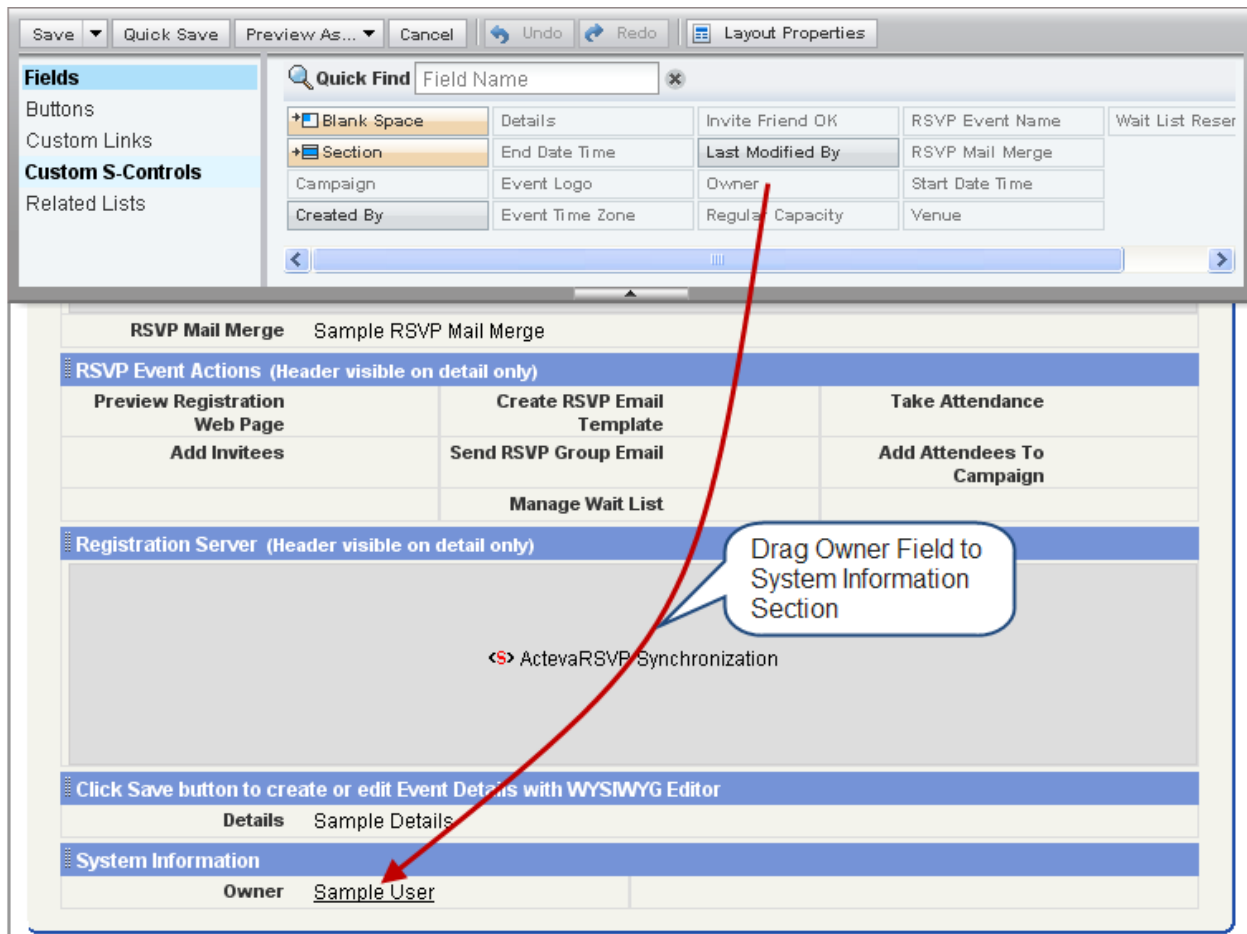
[Standard Fields \(4\)](#) | [Custom Fields & Relationships \(6\)](#) | [Validation Rules \(3\)](#) | [Standard Buttons and Links \(7\)](#) | [Custom Buttons and Links \(6\)](#) | [Page Layouts \(1\)](#) | [Search Layouts \(6\)](#) | [Record Types \(0\)](#)

Custom Object Definition Detail [Edit](#)

Singular Label	RSVP Event	Object Name	RSVP_Event
Plural Label	RSVP Events	Description	An RSVP event provides online registration for invitees.
		Enable Reports	<input checked="" type="checkbox"/>
		Track Activities	<input checked="" type="checkbox"/>
		Track Field History	<input type="checkbox"/>
		Deployment Status	Deployed
		Help Settings	Standard Salesforce Help Window
		Namespace Prefix	RSVP
API Name	RSVP__RSVP_Event__c	Created By	Elias Terman , 9/4/2007 3:48 PM
		Modified By	Elias Terman , 9/4/2007 3:48 PM

- Scroll down to the **Page Layouts** list. Click the **Edit** link next to the Page Layout named RSVP Event Layout.

Choose **Fields** from the menu in the upper left corner. Drag the “Owner” field to the **Information** section as shown below.



Customization – Specifying a Queue for New Leads

ActevaRSVP creates a new lead for each invited friend and any invitee that changes their contact information in the registration form. The person who creates an RSVP event owns these leads by default. If you would like those leads to go into a queue instead, you can specify a queue for the new leads on the ActevaRSVP Administration page.

You can choose any lead queue from the selection box. Click the “Select Group” button to make new leads created by ActevaRSVP owned by the selected queue.

Introduction to Upgrading ActevaRSVP

Acteva will notify you when upgrades to ActevaRSVP become available. Upgrades do not carry any additional cost, nor do they affect your ActevaRSVP subscription. Start the upgrade by following the steps in [Installing ActevaRSVP in Salesforce](#) above. Step 4 will show a Package Upgrade Details page. Click the red Continue button, then continue with the installation process to upgrade.

Important Notice for Organizations Using Salesforce Professional Edition

Make sure you perform all of the upgrade steps before using your upgraded ActevaRSVP. Specifically, make sure you update the page layouts to include new fields as described in the upgrade steps. If new fields are not in the page layout(s), ActevaRSVP may not work correctly.

The sections below show you how to upgrade to each new release of ActevaRSVP. Note that if you are upgrading by more than one version, you should follow the steps for all versions in between. For example, if you are upgrading from ActevaRSVP 2.0.0 to 2.1.0, then you should follow the steps for upgrading to 2.0.4 and 2.0.5, as well as 2.1.0.

Upgrading to ActevaRSVP Version 2.0.0

ActevaRSVP Version 2.0.0 offers several features, including

- RSVP event capacity and wait listing
- RSVP activity records for leads and contacts
- Ability to send mail on behalf of someone else (name and email address)
- Customization of the registration acknowledgement message

You will need to add RSVP Activity lists to contact and lead records when upgrading to version 2.0.0. See [Adding the RSVP Activity List to Contact and Lead Pages](#).

Important Notice for Organizations Using Salesforce Professional Edition

Make sure you perform all of the upgrade steps before using your upgraded ActevaRSVP. Specifically, make sure you update the page layouts to include new fields as described in the upgrade steps. If new fields are not in the page layout(s), ActevaRSVP may not work correctly.

Adding Wait List content to the RSVP Event Page

1. Click the **Setup** link at the top of a Salesforce page.
2. Find the **App Setup** section and expand the Create menu (click the +).
3. Click **Objects** under the Create menu. A list of custom objects appears in the main right pane.

- Find the label RSVP Event and click on it. The segment below the Salesforce tabs should look like this:

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
- Build
 - Apps
 - Objects
 - Tabs
 - S-Controls
 - Report Types
 - Code
 - Email Services
 - Tools
- Exchange
- Integrate

Administration Setup

Custom Object
RSVP Event (Managed) [Help for this Page](#)

Below is the information for the custom object. Click [Edit](#) to change the custom object.

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Standard Fields \(4\)](#) | [Custom Fields & Relationships \(6\)](#) | [Validation Rules \(3\)](#) | [Standard Buttons and Links \(7\)](#) | [Custom Buttons and Links \(6\)](#) | [Page Layouts \(1\)](#) | [Search Layouts \(6\)](#) | [Record Types \(0\)](#)

Custom Object Definition Detail [Edit](#)

Singular Label	RSVP Event	Object Name	RSVP_Event
Plural Label	RSVP Events	Description	An RSVP event provides online registration for invitees.
		Enable Reports	<input checked="" type="checkbox"/>
		Track Activities	<input checked="" type="checkbox"/>
		Track Field History	<input type="checkbox"/>
		Deployment Status	Deployed
API Name	RSVP__RSVP_Event__c	Help Settings	Standard Salesforce Help Window
		Namespace Prefix	RSVP
Created By	Elias Terman , 9/4/2007 3:48 PM	Modified By	Elias Terman , 9/4/2007 3:48 PM

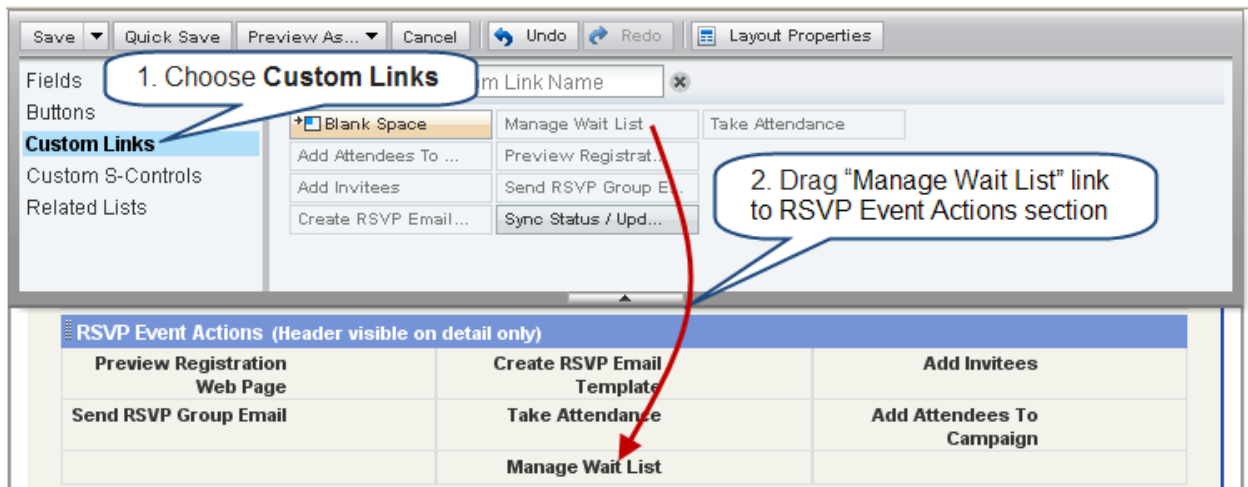
- Scroll down to the **Page Layouts** list. Click the **Edit** link next to the Page Layout named RSVP Event Layout.

- Choose **Fields** from the menu in the upper left corner. Drag the “Wait List Reserve” field to the **Information** section as shown below. You may also want to move the “Regular Capacity” field above the “<S> ActevaRSVP Event details View and Edit” block as shown.

The screenshot shows the 'RSVP Event Layout' editor interface. At the top, there are navigation buttons like 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below this is the 'Fields' menu, which is currently open. A callout box labeled '1. Choose Fields' points to the 'Fields' menu header. The 'Fields' menu contains several categories: Buttons, Custom Links, Custom S-Controls, and Related Lists. Under 'Buttons', there are options for 'Blank Space', 'Section', 'Campaign', and 'Created By'. Under 'Custom Links', there are 'Details', 'Event Logo', and 'Invite Friend OK'. Under 'Custom S-Controls', there are 'Last Modified By', 'Owner', 'Regular Capacity', and 'RSVP Event Name'. Under 'Related Lists', there are 'Start Date Time', 'Venue', and 'Wait List Reserve'. A red arrow originates from the 'Wait List Reserve' field in the 'Related Lists' section and points to the 'Wait List Reserve' field in the 'Information' section of the event detail page below. The event detail page has a header 'RSVP Event Sample' and a sub-header 'RSVP Event Detail' with buttons for 'Edit', 'Delete', 'Clone', and 'Sharing'. The 'Information' section is expanded, showing a list of fields with their values: 'RSVP Event Name' (Sample RSVP Event Name), 'Start Date Time' (3/10/2009 1), 'End Date Time' (3/10/2009 1), 'Venue' (Sample RSVP Event Venue), 'Invite Friend O', 'Event Lo', 'Campaign' (Sample Campaign), 'Regular Capacity' (Sample Regular Capacity), and 'Wait List Reserve' (Sample Wait List Reserve). A callout box labeled '2. Drag "Wait List Reserve" field to Information section.' points to the 'Wait List Reserve' field in the 'Information' section. Another callout box labeled 'Move "Regular Capacity" field above Details area' points to the 'Regular Capacity' field in the 'Information' section.

- Choose **Custom Links** from the menu in the upper left corner.
- Find the RSVP Event Custom Link labeled “Manage Wait List”. You can roll your mouse over a link to see the full name of the link.

9. Drag the “Manage Wait List” link to the Custom Links section on the page layout as shown below.



10. Click the **Save** button to save the RSVP Event page layout.

Adding the Country Field to the Participant Page Layout Required for Professional Edition

1. Click the **Setup** link at the top of a Salesforce page.
2. Find the **App Setup** section and expand the Create menu (click the +).
3. Click **Objects** under the Create menu. A list of custom objects appears in the main right pane.

- Find the label Participant and click on it. The segment below the Salesforce tabs should look like this:

Custom Object Participant (Managed) [Help for this Page ?](#)

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

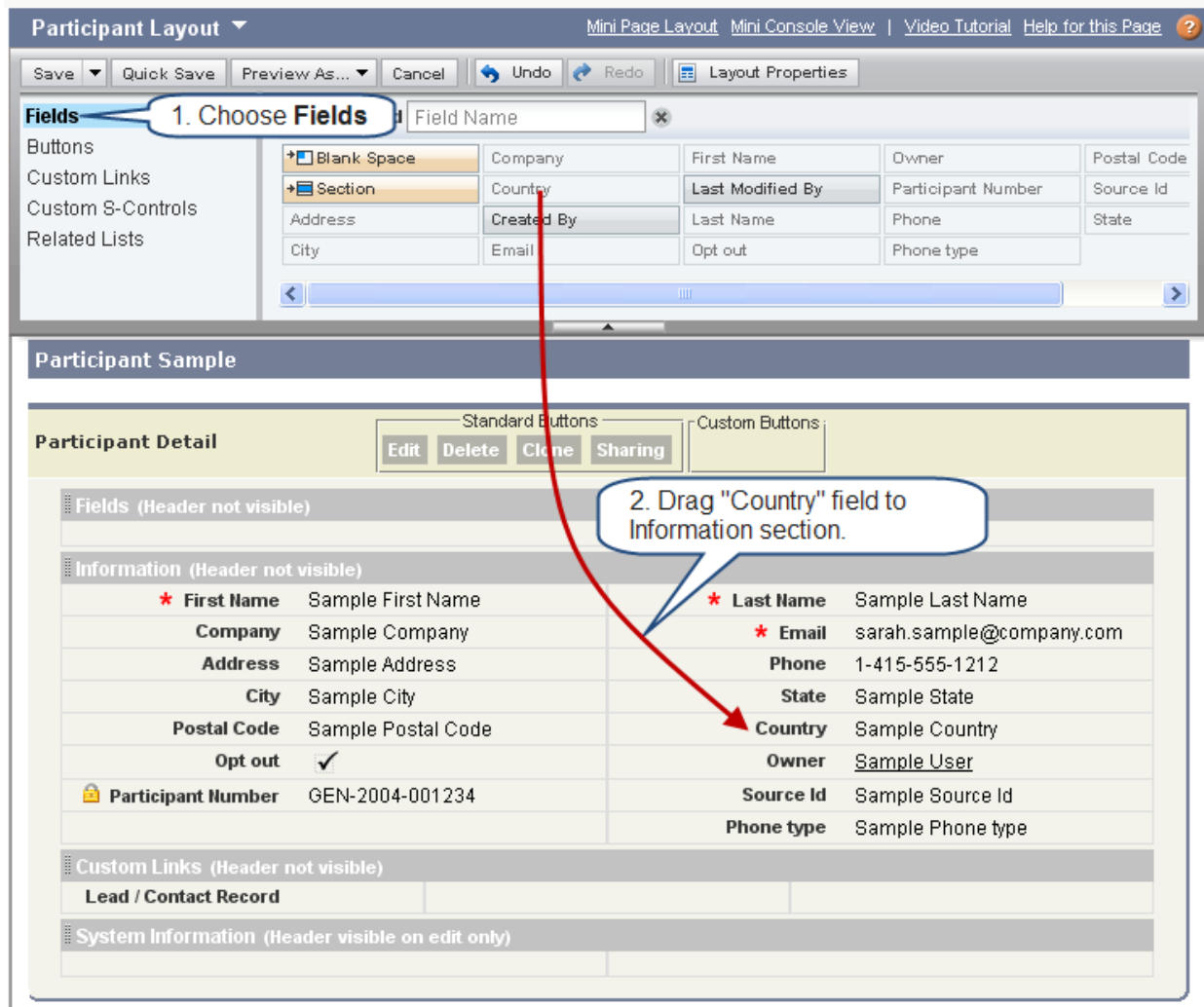
[Standard Fields \[4\]](#) | [Custom Fields & Relationships \[13\]](#) | [Validation Rules \[0\]](#) | [Standard Buttons and Links \[8\]](#) | [Custom Buttons and Links \[1\]](#) | [Page Layouts \[2\]](#) | [Search Layouts \[4\]](#) | [Record Types \[0\]](#) | [Apex Sharing Reasons \[0\]](#)

Custom Object Definition Detail [Edit](#)

Singular Label	Participant	Description	A person invited to an Acteva RSVP event.
Plural Label	Participants	Enable Reports	<input checked="" type="checkbox"/>
Object Name	Participant	Track Activities	<input checked="" type="checkbox"/>
Namespace Prefix	RSVP	Track Field History	<input type="checkbox"/>
Installed By	ActevaRSVP	Deployment Status	Deployed
API Name	RSVP__Participant__c	Help Settings	Standard Salesforce Help Window
Created By Ed Lemire , 7/5/2007 9:08 AM		Modified By Richard Cunningham , 7/1/2008 4:27 PM	

- Scroll down to the **Page Layouts** list. Click the **Edit** link next to the Page Layout named Participant Layout.

- Choose **Fields** from the menu in the upper left corner. Drag the “Country” field to the **Information** section as shown below.



Participant Layout Mini Page Layout Mini Console View Video Tutorial Help for this Page

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields 1. Choose Fields Field Name

Blank Space	Company	First Name	Owner	Postal Code
Section	Country	Last Modified By	Participant Number	Source Id
Address	Created By	Last Name	Phone	State
City	Email	Opt out	Phone type	

Participant Sample

Participant Detail Standard Buttons: Edit Delete Clone Sharing Custom Buttons

Fields (Header not visible)

Information (Header not visible)

* First Name	Sample First Name	* Last Name	Sample Last Name
Company	Sample Company	* Email	sarah.sample@company.com
Address	Sample Address	Phone	1-415-555-1212
City	Sample City	State	Sample State
Postal Code	Sample Postal Code	Country	Sample Country
Opt out	<input checked="" type="checkbox"/>	Owner	Sample User
Participant Number	GEN-2004-001234	Source Id	Sample Source Id
		Phone type	Sample Phone type

Custom Links (Header not visible)

Lead / Contact Record

System Information (Header visible on edit only)

2. Drag "Country" field to Information section.

- Click the **Save** button to save the Participant page layout.

Adding the Source Field to the Participation Page Layout Required for Professional Edition

1. Click the **Setup** link at the top of a Salesforce page.
2. Find the **App Setup** section and expand the Create menu (click the +).
3. Click **Objects** under the Create menu. A list of custom objects appears in the main right pane.
4. Find the label **Participation** and click on it. The segment below the Salesforce tabs should look like this:

Custom Object Help for this Page ?
Participation (Managed)

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Standard Fields \[3\]](#) | [Custom Fields & Relationships \[4\]](#) | [Validation Rules \[0\]](#) | [Standard Buttons and Links \[8\]](#) | [Custom Buttons and Links \[4\]](#) | [Page Layouts \[1\]](#) | [Search Layouts \[4\]](#) | [Record Types \[0\]](#)

Custom Object Definition Detail Edit

Singular Label	Participation	Description	Participation connects a Participant to an RSVP Event. It enables a Participant to participate in more than one event.
Plural Label	Participation	Enable Reports	<input checked="" type="checkbox"/>
Object Name	Participation	Track Activities	<input type="checkbox"/>
Namespace Prefix	RSVP	Track Field History	<input type="checkbox"/>
Installed By	ActevaRSVP	Deployment Status	Deployed
API Name	RSVP__Participation__c	Help Settings	Standard Salesforce Help Window
Created By Ed Lemire , 7/5/2007 9:08 AM		Modified By Richard Cunningham , 11/20/2008 2:29 PM	

5. Scroll down to the **Page Layouts** list. Click the **Edit** link next to the Page Layout named **Participation Layout**.

6. Choose **Fields** from the menu in the upper left corner. Drag the “Source” field to the **Information** section as shown below.

The screenshot shows the 'Participation Layout' editor interface. At the top, there is a menu with 'Fields' selected. A callout bubble points to this menu with the text '1. Choose Fields'. Below the menu, a table lists available fields: 'Participant', 'Participant Name', 'RSVP Event', and 'Source'. A red arrow points from the 'Source' field in this table to the 'Source' field in the 'Participation Sample' section below. Another callout bubble points to this 'Source' field with the text '2. Drag "Source" field to Information section.' The 'Participation Sample' section is divided into 'Fields (Header not visible)' and 'Information (Header visible on edit only)'. The 'Fields' section contains 'Participant Name' and 'RSVP Event'. The 'Information' section is currently empty.

7. Click the **Save** button to save the Participation page layout.

Upgrading to ActevaRSVP Version 2.0.4


ActevaRSVP Version 2.0.4 enables you to register an invitee as if you had a copy of their invitation and clicked the registration link. This is useful when an invitee calls your organization to register. You can answer RSVP questions or change contact information on behalf of the invitee as well. This creates an RSVP activity record on the invitee's contact or lead record. After installing the upgrade to version 2.0.4, your Salesforce administrator will need to add the new Registration Page link to the participation details page, as outlined in the steps below.

ActevaRSVP Version 2.0.4 also adds titles to the list of contacts or leads that you invite to the RSVP event.

Adding the Title Field to the Participant Page Layout Required for Professional Edition

1. Click the **Setup** link at the top of a Salesforce page.
2. Find the **App Setup** section and expand the Create menu (click the +).
3. Click **Objects** under the Create menu. A list of custom objects appears in the main right pane.
4. Find the label **Participant** and click on it. The segment below the Salesforce tabs should look like this:

Custom Object
Participant (Managed) [Help for this Page](#) ?

 This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Standard Fields \[4\]](#) | [Custom Fields & Relationships \[13\]](#) | [Validation Rules \[0\]](#) | [Standard Buttons and Links \[8\]](#) | [Custom Buttons and Links \[1\]](#) | [Page Layouts \[2\]](#) | [Search Layouts \[4\]](#) | [Record Types \[0\]](#) | [Apex Sharing Reasons \[0\]](#)

Custom Object Definition Detail [Edit](#)

Singular Label	Participant	Description	A person invited to an Acteva RSVP event.
Plural Label	Participants	Enable Reports	<input checked="" type="checkbox"/>
Object Name	Participant	Track Activities	<input checked="" type="checkbox"/>
Namespace Prefix	RSVP	Track Field History	<input type="checkbox"/>
Installed By	ActevaRSVP	Deployment Status	Deployed
API Name	RSVP__Participant__c	Help Settings	Standard Salesforce Help Window
Created By	Ed Lemire , 7/5/2007 9:08 AM	Modified By	Richard Cunningham , 7/1/2008 4:27 PM

5. Scroll down to the **Page Layouts** list. Click the **Edit** link next to the Page Layout named "Participant Layout".

6. Choose **Fields** from the menu in the upper left corner. Drag the “Title” field to the **Information** section as shown below.

The screenshot shows the 'Participant Layout' editor interface. At the top, there are navigation buttons: Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below this is the 'Fields' menu, which is highlighted with a blue callout box containing the text '1. Choose Fields'. The Fields menu displays a grid of fields including: Blank Space, Section, Address, City, Company, Country, Created By, Email, First Name, Last Modified By, Last Name, Opt out, Owner, Participant Number, Phone, Phone type, Postal Code, Source Id, State, and Title. A red arrow originates from the 'Title' field in this menu and points to the 'Title' field in the 'Information' section of the 'Participant Sample' detail view below. The 'Participant Sample' detail view shows a 'Participant Detail' section with 'Standard Buttons' (Edit, Delete, Clone, Sharing) and 'Custom Buttons'. Below this are sections for 'Fields (Header not visible)', 'Information (Header not visible)', 'Custom Links (Header not visible)', and 'System Information (Header visible on edit only)'. The 'Information' section contains a table of fields with sample data: First Name (Sample First Name), Last Name (Sample Last Name), Company (Sample Company), Email (sarah.sample@company.com), Address (Sample Address), Phone (1-415-555-1212), City (Sample City), State (Sample State), Postal Code (Sample Postal Code), Title (Sample Title), Opt out (checked), and Country (Sample Country). A blue callout box with the text '2. Drag "Title" field to Information section.' points to the 'Title' field in this table.

7. Click the **Save** button to save the Participant page layout.

Adding the Registration Page Link to the Participation Details Page

1. Click the **Setup** link at the top of a Salesforce page.
2. Find the **App Setup** section and expand the Create menu (click the +).
3. Click **Objects** under the Create menu. A list of custom objects appears in the main right pane.
4. Find the label **Participation** and click on it. The segment below the Salesforce tabs should look like this:

Custom Object
Participation (Managed) [Help for this Page](#) ?

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Standard Fields](#) [3] | [Custom Fields & Relationships](#) [4] | [Validation Rules](#) [0] | [Standard Buttons and Links](#) [8] | [Custom Buttons and Links](#) [4] | [Page Layouts](#) [1] | [Search Layouts](#) [4] | [Record Types](#) [0]

Custom Object Definition Detail [Edit](#)

Singular Label	Participation	Description	Participation connects a Participant to an RSVP Event. It enables a Participant to participate in more than one event.
Plural Label	Participation	Enable Reports	<input checked="" type="checkbox"/>
Object Name	Participation	Track Activities	<input type="checkbox"/>
Namespace Prefix	RSVP	Track Field History	<input type="checkbox"/>
Installed By	ActevaRSVP	Deployment Status	Deployed
API Name	RSVP__Participation__c	Help Settings	Standard Salesforce Help Window
Created By	Ed Lemire , 7/5/2007 9:08 AM	Modified By	Richard Cunningham , 11/20/2008 2:29 PM

5. Scroll down to the **Page Layouts** list. Click the **Edit** link next to the Page Layout named **Participation Layout**.

6. Choose **Custom Links** from the menu in the upper left corner. Drag the **Registration Page** link to an empty slot in the **Custom Links** section, as shown below.

The screenshot shows the 'Participation Layout' editor interface. The top toolbar includes buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. A 'Quick Find' search box is set to 'Custom Link Name'. A list of links is displayed, including 'Blank Space', 'Registration Page', 'Update from Lead...', and 'View Lead / Conta...'. A callout box labeled '1. Choose Custom Links' points to the 'Custom Links' option in the left-hand menu.

Below this, a 'Participation Sample' is shown. It features a 'Participation Detail' section with 'Standard Buttons' (Edit, Delete, Clone) and a table of fields. A callout box labeled '2. Drag The Registration Page link to the Custom Links section' points to the 'Registration Page' link in the 'Custom Links' section of the sample layout.

Participation Detail			
Fields (Header not visible)			
* ● Participant Name	Sample Participant Name	Status	Sample Status
Participant	<u>Sample Participant</u>	* ● RSVP Event	<u>Sample RSVP Event</u>
Source	Sample Source		
Information (Header visible on edit only)			
System Information (Header visible on edit only)			
Custom Links (Header visible on detail only)			
View Lead / Contact Record	Update from Lead / Contact Record	Registration Page	

7. Click the **Save** button to save the Participation page layout.

Upgrading to ActevaRSVP Version 2.0.5

ActevaRSVP Version 2.0.5 introduces consistent viewing and editing of RSVP events across time zones in Salesforce. RSVP events created in version 2.0.5 will have a time zone that applies to the start and end times. The RSVP event time zone will show on the registration page. The template editor now has a merge field for the event's time zone as well.

Adding Time Zone to the RSVP Event Page

1. Click the **Setup** link at the top of a Salesforce page.
2. Find the **App Setup** section and expand the Create menu (click the +).
3. Click **Objects** under the Create menu. A list of custom objects appears in the main right pane.
4. Find the label **RSVP Event** and click on it. The segment below the Salesforce tabs should look like this:

The screenshot shows the Salesforce Setup interface for the 'RSVP Event (Managed)' custom object. On the left is a navigation sidebar with sections: Personal Setup, App Setup, and Administration Setup. The 'App Setup' section is expanded to show 'Objects'. The main content area displays the 'Custom Object Definition Detail' for 'RSVP Event'. It includes a table with fields like Singular Label, Plural Label, Object Name, Description, and API Name. Below the table are several configuration options with checkboxes, such as 'Enable Reports' and 'Track Activities', which are checked. The 'Created By' and 'Modified By' fields show 'Elias Terman' on '9/4/2007 3:48 PM'.

Custom Object Definition Detail		Edit	
Singular Label	RSVP Event	Object Name	RSVP_Event
Plural Label	RSVP Events	Description	An RSVP event provides online registration for invitees.
API Name	RSVP__RSVP_Event__c	Enable Reports	<input checked="" type="checkbox"/>
Created By	Elias Terman, 9/4/2007 3:48 PM	Track Activities	<input checked="" type="checkbox"/>
		Track Field History	<input type="checkbox"/>
		Deployment Status	Deployed
		Help Settings	Standard Salesforce Help Window
		Namespace Prefix	RSVP
		Modified By	Elias Terman, 9/4/2007 3:48 PM

5. Scroll down to the **Page Layouts** list. Click the **Edit** link next to the Page Layout named **RSVP Event Layout**.

- Choose **Fields** from the menu in the upper left corner. Drag the “Event Time Zone” field to the **Information** section as shown below.

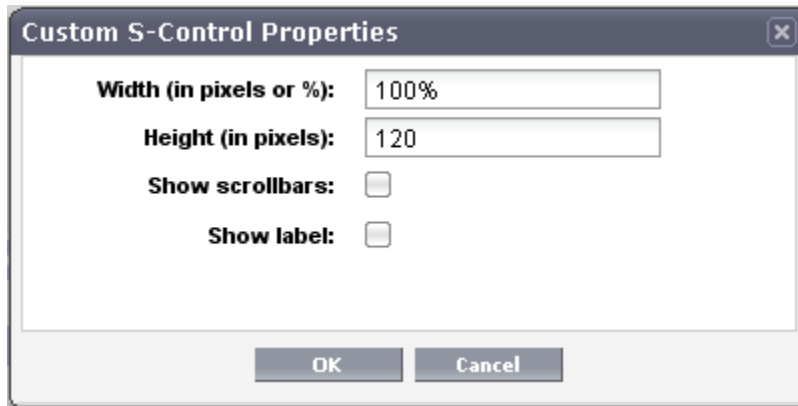
The screenshot shows the 'RSVP Event Layout' editor. At the top, there is a menu bar with options like 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. Below this is a 'Fields' menu with a search box labeled 'Field Name'. A callout bubble points to the 'Fields' menu with the text '1. Choose Fields'. The 'Fields' menu is open, showing a list of fields: Blank Space, Section, Campaign, Created By, Details, End Date Time, Event Logo, Event Time Zone, Invite Friend OK, Last Modified By, Owner, Regular Capacity, RSVP Event Name, RSVP Mail Merge, Start Date Time, and Venue. A red arrow points from the 'Event Time Zone' field in the list to the 'Information' section of the event detail below. The 'Information' section is titled 'Information (Header visible on edit only)' and contains a table of event details. A callout bubble points to the 'Event Time Zone' field in the table with the text '2. Drag "Event Time Zone" field to Information section.' The table contains the following data:

Information (Header visible on edit only)		
* ● RSVP Event Name	Sample RSVP Event Name	
Start Date Time	5/18/2009 2:49 PM	
End Date Time	5/18/2009 2:49 PM	
Event Time Zone	Sample Event Time Zone	
Venue	Sample RSVP Event Venue	
Invite Friend OK	<input checked="" type="checkbox"/>	
Event Logo	www.salesforce.com	
Campaign	Sample Campaign	
* ● Regular Capacity	Sample Regular Capacity	
Wait List Reserve	Sample Wait List Reserve	

- Continue scrolling down the RSVP Layout until you get to the Registration Server section. Move the cursor down to the box containing “<S> ActevaRSVP Synchronization” and click the Properties icon as shown below.

The screenshot shows the 'Registration Server (Header visible on detail only)' section. It contains a box with the text '<S> ActevaRSVP Synchronization'. A callout bubble points to the Properties icon (a small gear) in the top right corner of the box with the text 'Click to pop up Properties dialog'.

8. Change the height to 120, as shown below:



9. Click OK on the dialog box.
10. Click the Save button in the upper left corner of the page layout page.

Setting a Default RSVP Event Time Zone (Recommended)

You can specify a default time zone for RSVP Events. Each new RSVP Event will have the default time zone, unless it is changed when created or edited.

If you have just finished changing the RSVP Event Page layout, skip steps 1-4 below.

1. Click the **Setup** link at the top of a Salesforce page.
2. Find the **App Setup** section and expand the Create menu (click the +).
3. Click **Objects** under the Create menu. A list of custom objects appears in the main right pane.

- Find the label RSVP Event and click on it. The segment below the Salesforce tabs should look like this:

Custom Object
RSVP Event (Managed) [Help for this Page](#)

Below is the information for the custom object. Click [Edit](#) to change the custom object.

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Standard Fields \[4\]](#) | [Custom Fields & Relationships \[6\]](#) | [Validation Rules \[3\]](#) | [Standard Buttons and Links \[7\]](#) | [Custom Buttons and Links \[6\]](#) | [Page Layouts \[1\]](#) | [Search Layouts \[6\]](#) | [Record Types \[0\]](#)

Custom Object Definition Detail [Edit](#)

Singular Label	RSVP Event	Object Name	RSVP_Event
Plural Label	RSVP Events	Description	An RSVP event provides online registration for invitees.
		Enable Reports	<input checked="" type="checkbox"/>
		Track Activities	<input checked="" type="checkbox"/>
		Track Field History	<input type="checkbox"/>
		Deployment Status	Deployed
		Help Settings	Standard Salesforce Help Window
		Namespace Prefix	RSVP
API Name	RSVP__RSVP_Event__c	Created By	Elias Terman , 9/4/2007 3:48 PM
		Modified By	Elias Terman , 9/4/2007 3:48 PM

- Find the **Custom Fields & Relationships** section of the page, then locate the field labeled Event Time Zone. Click Event Time Zone.
- Go to the **Picklist values** section of the page and locate your time zone on the list. Click the Edit link to the left of your time zone.
- Check the box labeled “Make this value the default for the master picklist”.
- Click the Save button.

Adding Account Field to Contact RSVP Activity Required for Professional Edition

- Click the Setup link at the top of a Salesforce page.
- Find the **App Setup** section and expand the Create menu (click the +).
- Click Objects under the Create menu. A list of custom objects appears in the main right pane.

- Find the label Contact RSVP Activity and click on it. The segment below the Salesforce tabs should look like this:

Personal Setup

- ☑ My Personal Information
- ☑ Email
- ☑ Import
- ☑ Desktop Integration

App Setup

- ☑ Customize
- ☑ Create
 - Apps
 - Custom Labels
 - Objects
 - Packages
 - Report Types
 - Tabs
- ☑ Workflow & Approvals
- ☑ Develop
- ☑ Deploy
 - View Installed Packages
 - Critical Updates

Custom Object
Help for this Page ?

Contact RSVP Activity (Managed)

This Custom Object Definition is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Standard Fields \[3\]](#) | [Custom Fields & Relationships \[8\]](#) | [Validation Rules \[0\]](#) | [Standard Buttons and Links \[8\]](#) | [Custom Buttons and Links \[0\]](#) | [Page Layouts \[1\]](#) | [Search Layouts \[4\]](#) | [Record Types \[0\]](#)

Custom Object Definition Detail Edit

Singular Label	Contact RSVP Activity	Description	Activity record created by ActevaRSVP registration server to show changes to RSVP status and other information pertaining to an RSVP event.
Plural Label	Contact RSVP Activities	Enable Reports	<input checked="" type="checkbox"/>
Object Name	Contact_Activity	Track Activities	<input type="checkbox"/>
Namespace Prefix	RSVP	Track Field History	<input type="checkbox"/>
Installed Package	ActevaRSVP [Available in Versions: 1.33 - Current]	Deployment Status	Deployed
API Name	RSVP__Contact_Activity__c	Help Settings	Custom Help S-control Window (ActevaRSVP Contact Activity Help)
Created By	Richard Cunningham , 5/18/2009 2:22 PM	Modified By	Richard Cunningham , 5/18/2009 2:23 PM

- Scroll down to the **Page Layouts** list. Click the **Edit** link next to the Page Layout named Contact RSVP Activity Layout.

12. Choose **Fields** from the menu in the upper left corner. Drag the “Account” field to the **Information** section as shown below.

The screenshot displays the 'Contact RSVP Activity Layout' editor. At the top, there are navigation buttons: Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below this is a 'Fields' menu with a search box labeled 'Field Name'. A callout bubble points to the 'Fields' menu with the text '1. Choose Fields'. The 'Fields' menu is open, showing a list of fields: Blank Space, Section, Account, and Activity Date and Time. A red arrow points from the 'Account' field in the list to the 'Information' section of the activity detail page below. The 'Information' section is titled 'Information (Header visible on edit only)' and contains several fields: Contact RSVP Activity Name (GEN-2004-001234), Contact (Sample Contact), Participation (Sample Participation), Activity Date and Time (6/17/2009 9:57 AM), RSVP Event Name (Sample RSVP Event Name), Previous Participation Status (Sample Previous Participation Status), Activity Participation Status (Sample Activity Participation Status), Activity Description (Sample Activity Description), and Account (Sample Account). A callout bubble points to the 'Account' field in the 'Information' section with the text '2. Drag Account field to Information section.' Below the 'Information' section is the 'System Information' section, which includes 'Created By' (Sample User) and 'Last Modified By' (Sample User). At the bottom is the 'Custom Links' section.

13. Click the Save button in the upper left corner of the page layout page.

Upgrading to ActevaRSVP Version 2.1.0

ActevaRSVP Version 2.1.0 enhances the registration page, including an event contact block. This event contact information comes from a field on the RSVP event page, which you add to the RSVP event page layout when upgrading from earlier versions. You can also add the “Mail Merge” field to the RSVP Event page, if you plan to use it.

First, install ActevaRSVP version 2.1.0. See [Introduction to Upgrading ActevaRSVP](#) for details.

Adding Event Contact Field to the RSVP Event Page

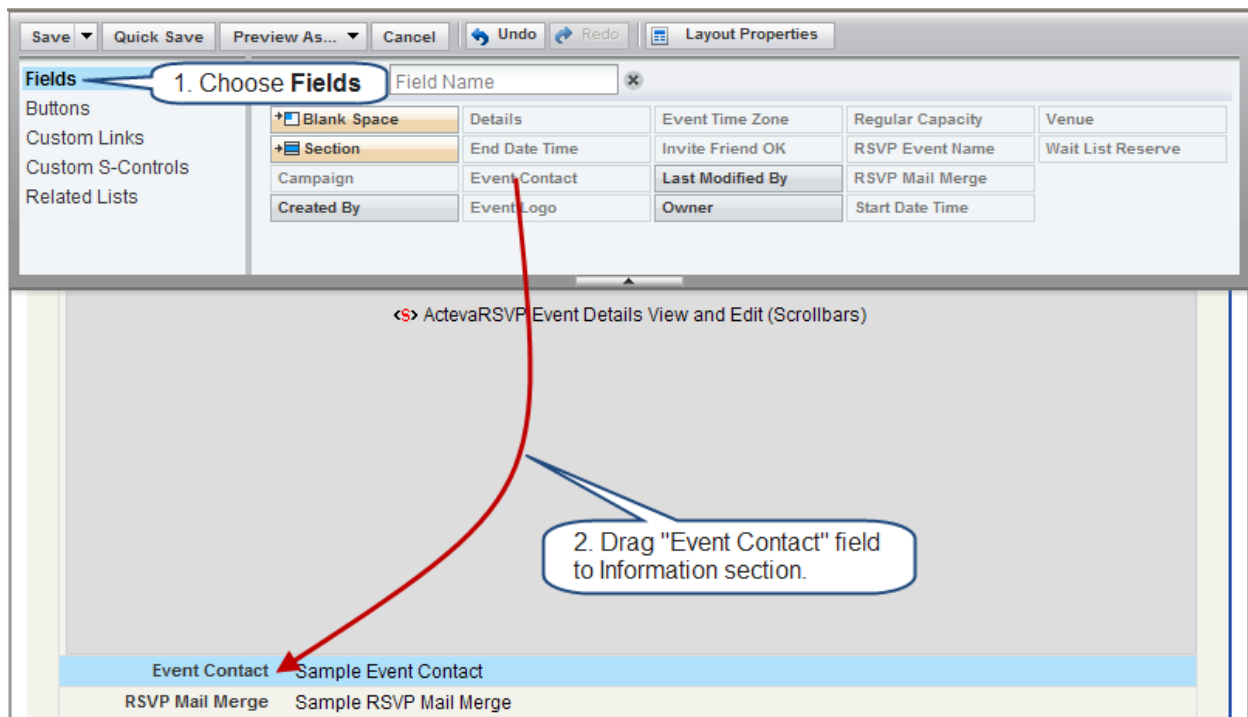
1. Click the **Setup** link at the top of a Salesforce page.
2. Find the **App Setup** section and expand the Create menu (click the +).
3. Click **Objects** under the Create menu. A list of custom objects appears in the main right pane.
4. Find the label **RSVP Event** and click on it. The segment below the Salesforce tabs should look like this:

The screenshot shows the Salesforce Setup interface for a custom object named "RSVP Event (Managed)". On the left is a navigation sidebar with sections for Personal Setup, App Setup, and Administration Setup. The "Objects" link under App Setup is highlighted. The main content area shows the "Custom Object Definition Detail" for the "RSVP Event" object. It includes fields for Singular Label, Plural Label, Object Name, Description, Enable Reports, Track Activities, Track Field History, Deployment Status, API Name, Help Settings, Namespace Prefix, Created By, and Modified By.

Custom Object Definition Detail		Edit	
Singular Label	RSVP Event	Object Name	RSVP_Event
Plural Label	RSVP Events	Description	An RSVP event provides online registration for invitees.
		Enable Reports	<input checked="" type="checkbox"/>
		Track Activities	<input checked="" type="checkbox"/>
		Track Field History	<input type="checkbox"/>
		Deployment Status	Deployed
API Name	RSVP__RSVP_Event__c	Help Settings	Standard Salesforce Help Window
		Namespace Prefix	RSVP
Created By	Elias Terman, 9/4/2007 3:48 PM	Modified By	Elias Terman, 9/4/2007 3:48 PM

5. Scroll down to the **Page Layouts** list. Click the **Edit** link next to the Page Layout named **RSVP Event Layout**.

6. Choose **Fields** from the menu in the upper left corner. Drag the “Event Contact” field to the **Information** section as shown below.



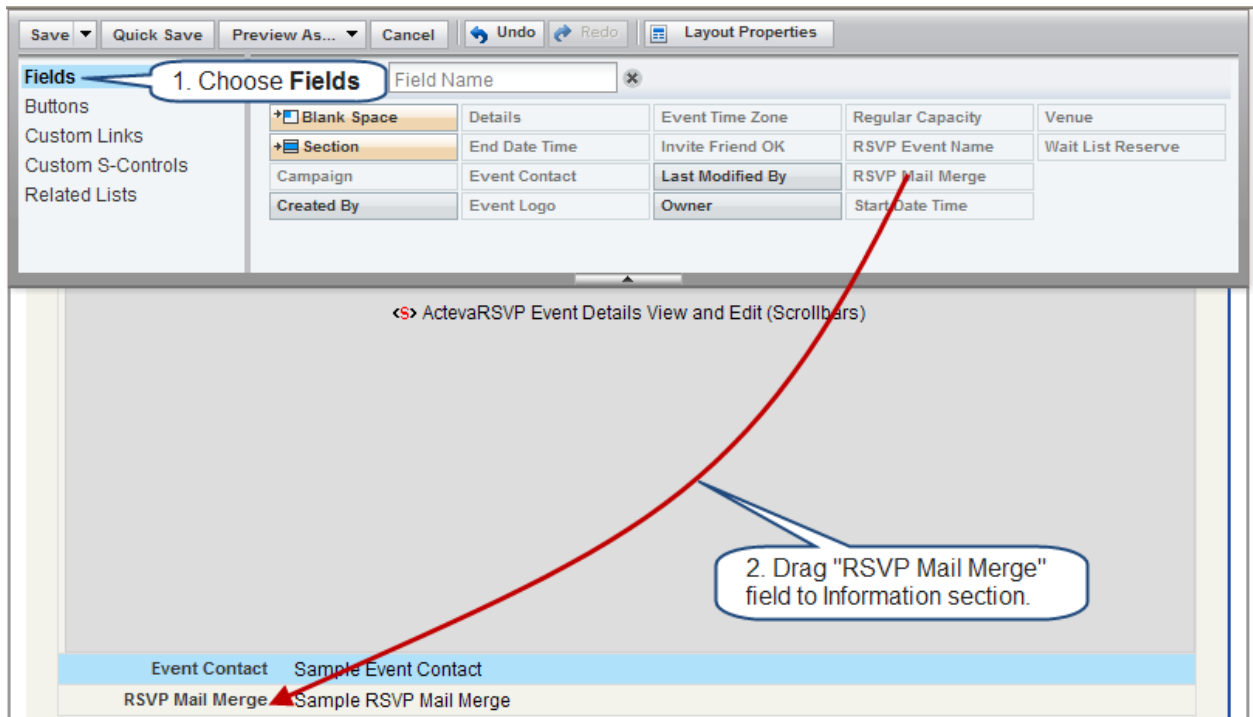
7. Click the Save button in the upper left corner of the page layout page, unless you plan to add the Mail Merge field as well.

Adding the Event Mail Merge Field to the RSVP Event Page (Optional)

Event organizers typically use the RSVP Event Mail Merge field along with a custom registration acknowledgment template to send event-specific information only to those who have registered for the event. See [Customization – Registration Acknowledgement Email](#) for more details about the registration acknowledgment template and example of how you can use it with the mail merge field.

If you still have the RSVP Event page layout open from adding the Event Contact field, continue with the steps below. Otherwise, follow steps 1 through 5 above.

1. Choose **Fields** from the menu in the upper left corner. Drag the “Mail Merge” field to the **Information** section as shown below.



2. Click the Save button in the upper left corner of the page layout page.