

THINKIFIC +

# Thinkific Salesforce Connector

User  
Guide

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## Table of Contents

Introduction.....	3
Thinkific Connector Limitations and Requirements.....	3
Limitations.....	3
Requirements.....	3
Upgrading the Thinkific Connector Package.....	4
Before Updating the Package.....	4
Updating the Package.....	6
Installing Thinkific Connector Package.....	7
Thinkific Connector Lightning Application.....	9
Configuring Thinkific Connector Package.....	10
1) Setup the Force.com Site.....	10
Create a new Force.com Site.....	11
Setup the Site Permissions.....	13
Enable access for your newly created Force.com Site.....	16
Save and Verify your Force.com Site on the Connector Configuration Page.....	17
2) Setup the School connection.....	18
Connecting to a School.....	18
Thinkific Connector Lightning Application in Details.....	20
Student User Tab.....	20
Linking orphan Student Users with Salesforce Contacts.....	20
Courses Tab.....	22
Course Enrollment Tab.....	22
Lessons Tab.....	23
Lessons Enrollment Tab.....	23

# THINKIFIC +

Integration Logs Tab.....	24
Enabling / Disabling Integration Logs.....	24
Contact Quick Action Button to Create Student User.....	26
Adding the Quick Action Button on Contact Record page.....	26
Creating Reports with Schools data.....	28
School data custom objects.....	28
Site.....	28
Course.....	28
Lesson.....	28
Student User.....	28
Course Enrollment.....	28
Lesson Enrollment.....	28
Default Reports Types.....	29
Creating a report.....	29
School x Salesforce Data Mapping.....	31

## Introduction

With Thinkific Plus you can integrate with Salesforce to view Thinkific course enrollments, student progress and completion data from directly within Salesforce. This unifies your customer education data into one central place for your customer success and marketing teams.

Below you will find the User Guide to take you through the steps to setup your Thinkific Salesforce Connector and answer common questions. For more information, please do not hesitate to reach out to your Customer Success Manager.

## Thinkific Connector Limitations and Requirements

The Salesforce Thinkific Connector was developed using Salesforce Lightning Experience. Some connector functionalities will not be available in Salesforce Classic.

### Limitations

The current Salesforce Thinkific Connector doesn't sync the existing School data. Only new events will be sent to the Salesforce Org.

Functionalities not available in Salesforce Classic:

- Contact Quick Action to create users in Thinkific Schools directly from a Salesforce Contact.
- Thinkific Connector Lightning Application

### Requirements

It's necessary to enable Salesforce **My Domain** on your Salesforce Org.

- Learn about Salesforce My Domain [here](#).
- Learn how to enable Salesforce My Domain [here](#).

## Upgrading the Thinkific Connector Package

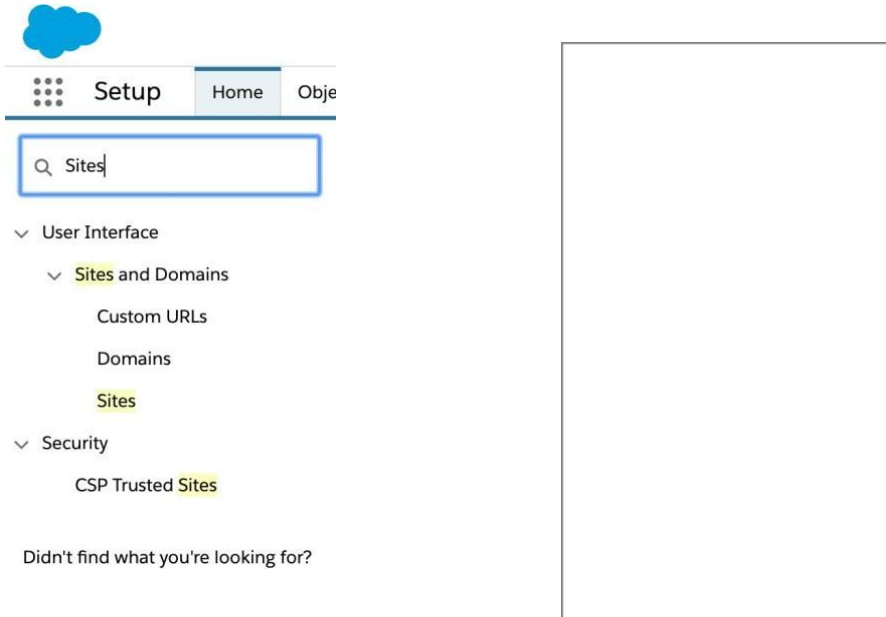
Since the Winter '21 release, Salesforce reduced the permission available for Guest Users ([see Salesforce release notes](#)). Due to these changes, the connector permissions have been updated to support the new Salesforce security requirements. Some steps are required before and after upgrading the connector package version:

### Before Updating the Package

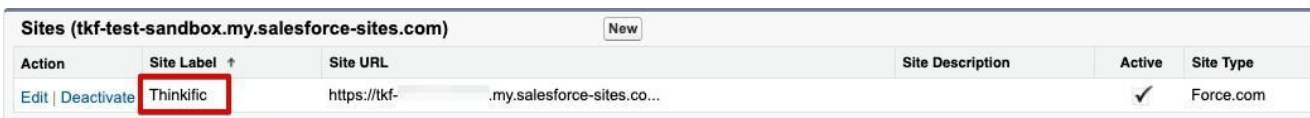
Remove the old permission set assigned to the connector public site's user:

**NOTE: The synchronization will stop working while the configuration and update are not completed**

1. From *Salesforce Setup Page* enter *Sites* in the *Quick Find* box, then navigate to *Sites*.



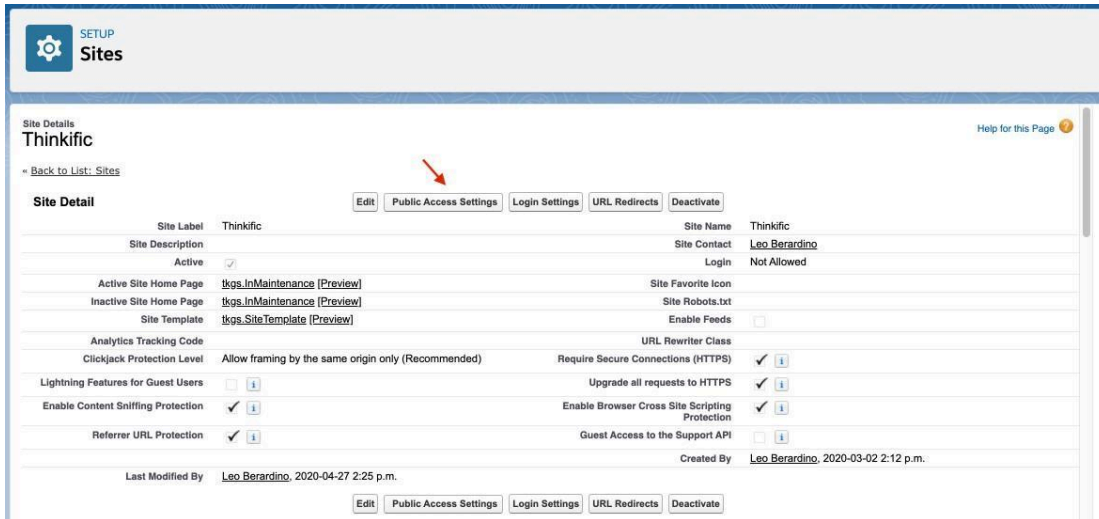
2. On the Sites page locate the *Thinkific Connector site* and click on the *site label*.



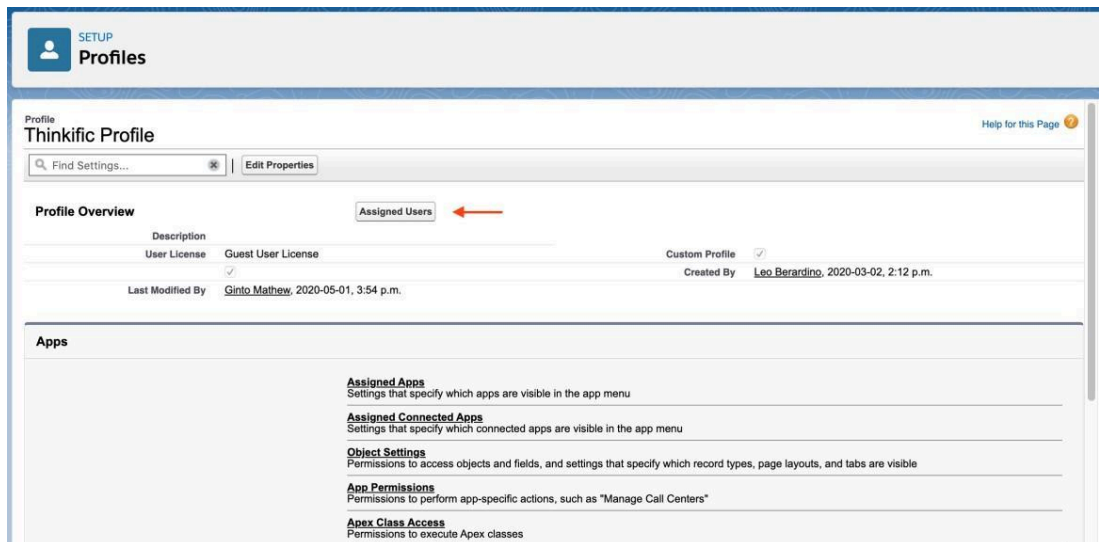
Sites (tkf-test-sandbox.my.salesforce-sites.com) <span>New</span>					
Action	Site Label ↑	Site URL	Site Description	Active	Site Type
<a href="#">Edit</a>   <a href="#">Deactivate</a>	Thinkific	https://tkf-...my.salesforce-sites.co...		<input checked="" type="checkbox"/>	Force.com

# THINKIFIC +

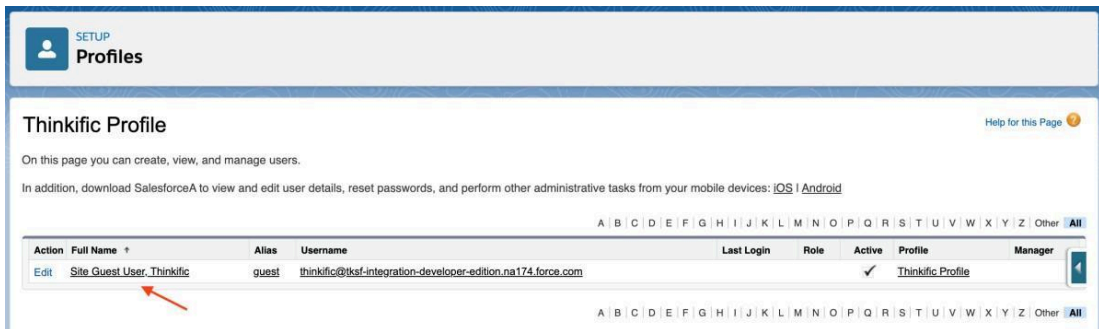
3. On the Thinkific site page click on the **Public Access Settings** button.



4. In the Thinkific profile page click on **Assigned Users** button.

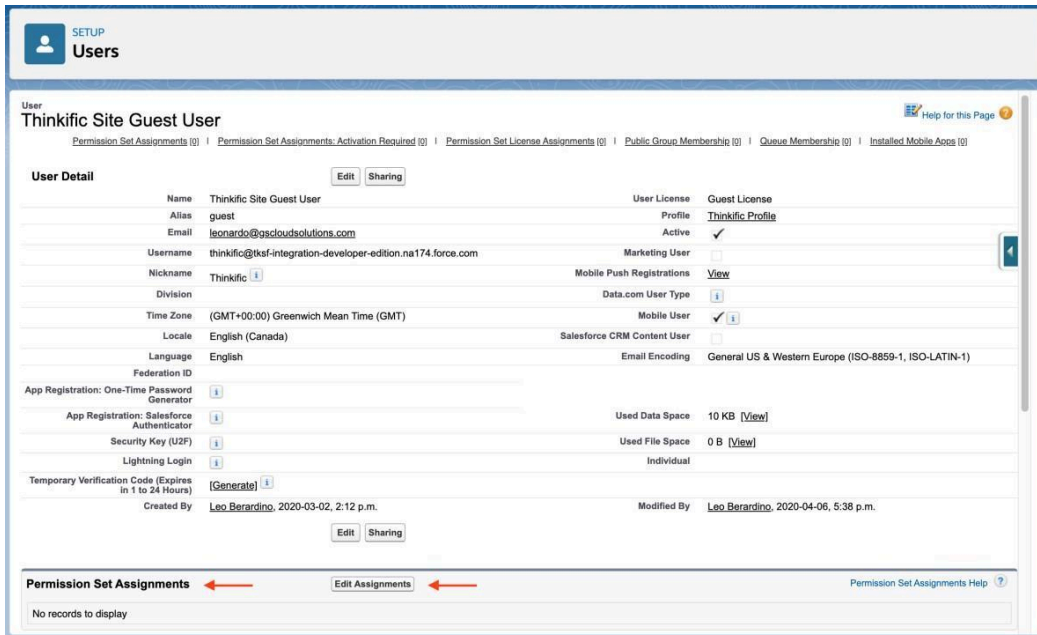


5. Click on the **Site Guest User Full Name** hyperlink.

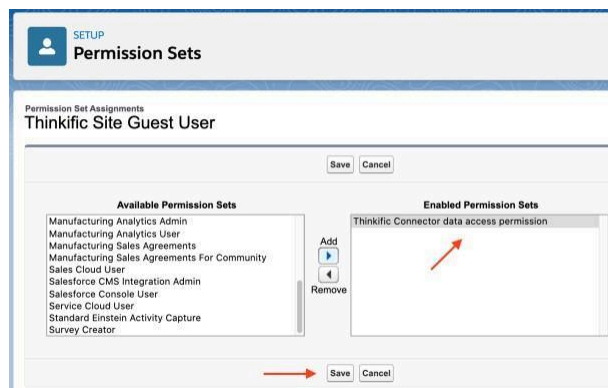


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- Now, on the Site Guest User, go to the **Permission Set Assignments** section and click on the **Edit Assignments** button.



- Select the **Thinkific Connector Data Access Permission Set** on the **Enabled Permission Sets** list and click on the **Remove** button. Click on the **Save** button.



## Updating the Package

After removing the old permission set assigned to the connector public site's user, follow the steps in the [Installing/Upgrading Thinkific Connector Package](#) section.

When the update is completed, you will need to assign the new permission set to the site guess user as described in the [Setup the Site Permissions](#) section.

## Installing/Upgrading Thinkific Connector Package

The Thinkific Salesforce Connector is distributed from the Salesforce AppExchange. To install it, access the Thinkific Connector page in AppExchange using the links below (Sandbox installation or Product installation) and follow the instructions.

- [Sandbox installation](#) (For beta/testing purposes)
  - [Production installation](#) (Full package release)
1. Choose the type of installation: Install for **Admins Only**, Install for **All Users** or Install for **Specific Profiles**.
  2. Enter Installation Key tqF5BInRG90TgpBK1dWi7itgsrkVr2SI
  3. Verify that you have read the **acknowledgement message**.
  4. If you are installing the connector for the first time, click on the **Install** button. If you are updating it, click on the **Update** button.
  5. If you are **updating the connector package version**, wait for the update to be completed and go to the [Setup the Site Permissions](#) section.

**Install ThinkificGS**  
By Groundswell Cloud Solutions Inc.

**Warning:** This app is protected by an installation key.

Password

Install for Admins Only

Install for All Users

Install for Specific Profiles...

**Warning:** You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

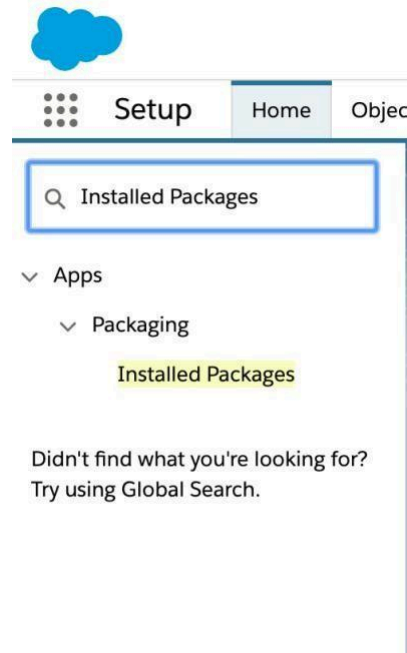
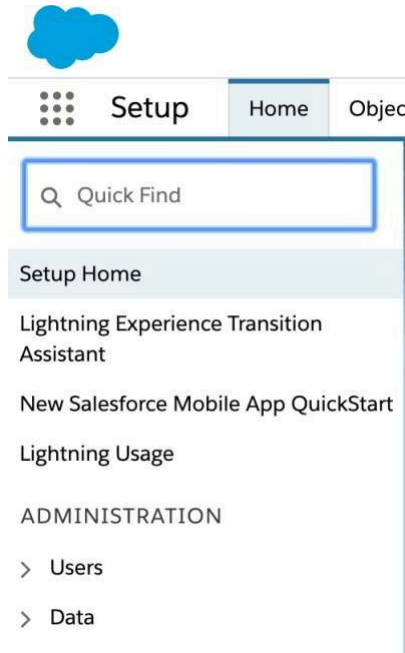
I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.



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After the installation process, the package will be visible in the *Salesforce Installed Packed* page. To access it go to the *Salesforce Setup* page and in the *Quick Find* input box type *Installed Packages*.

From *Installed Packages* pages it's also possible to uninstall the package.



The Installed *Packages* page:

A screenshot of the Salesforce 'Installed Packages' page. The page header shows 'SETUP' and 'Installed Packages'. Below the header, there is a section titled 'Installed Packages' with a brief introduction and instructions. Below this is a table of installed packages. The table has columns for Action, Package Name, Publisher, Version Number, Namespace Prefix, Install Date, Limits, Apps, Tabs, and Objec. One package is listed: 'ThinkificGS' by 'Groundswell Cloud Solutions Inc.' with version '0.1 (Beta 265)' and namespace 'tkgs'. Below the table, there is a section for 'Uninstalled Packages' which is currently empty.

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objec
<a href="#">Uninstall</a>	ThinkificGS	Groundswell Cloud Solutions Inc.	0.1 (Beta 265)	tkgs	4/24/2020, 1:08 PM	✓	1	8	

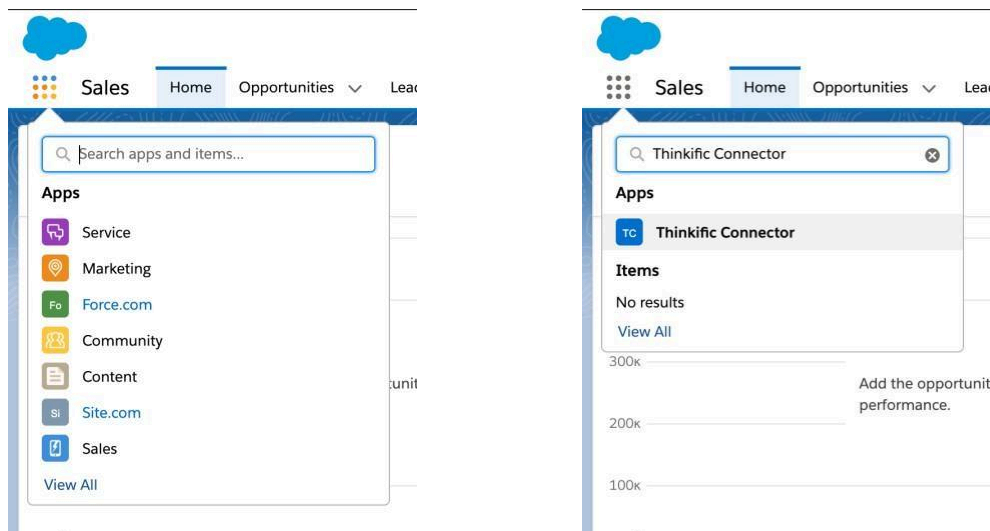
**Uninstalled Packages**

No uninstalled package data archives

## Thinkific Connector Lightning Application

The Thinkific Connector comes with a new Lightning Application that allows Salesforce users to access the school data and reports.

To open the Thinkific Connector Lightning Application click on **Salesforce App Launcher** and type **Thinkific Connector**.



After opening the Thinkific Connector Lightning Application for the first time it will be necessary to configure the Thinkific Connector.

More details about the Thinkific Connector Lightning Application could be found on [Thinkific Connector Lightning Application in Details](#) topic.

## Configuring Thinkific Connector Package

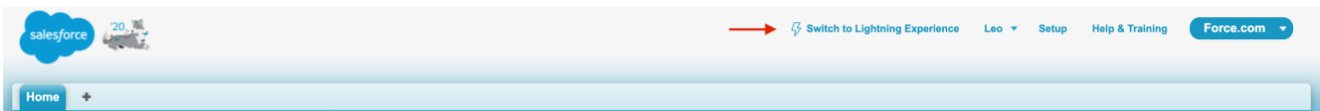
Go to the [Setup the Site Permissions](#) section if you are *updating the connector package version* and you *already have the site created*.

Now that you've installed the package, it is time to do a one-time configuration to connect the Salesforce Org\* to your Thinkific schools. To start the connector configuration go to the [Thinkific Connector Lightning Application](#) and open the *Package Setup* tab.

The configuration is made in two steps:

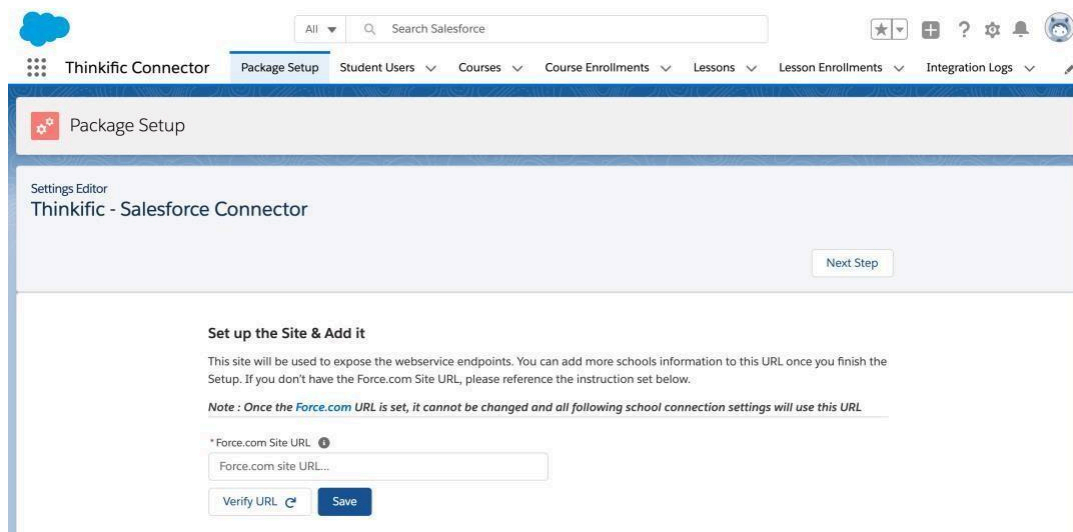
- [Set up the Force.com Site](#) used to receive data from the Thinkific School.
- [Setup the School connection](#).

\* If your Salesforce Org is using Classic Version instead of Lightning experience, it'll be necessary to switch to Lightning Experience to perform the setup steps. After the Connector setup you can switch back to Classic.



### 1) Setup the Force.com Site

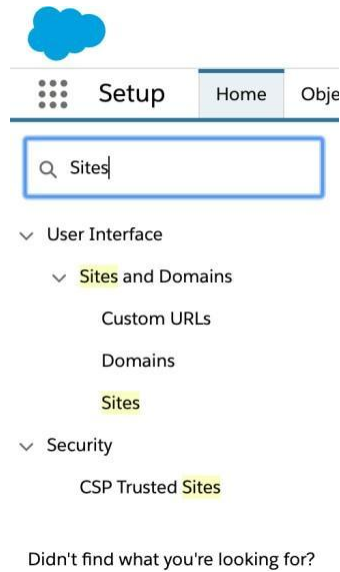
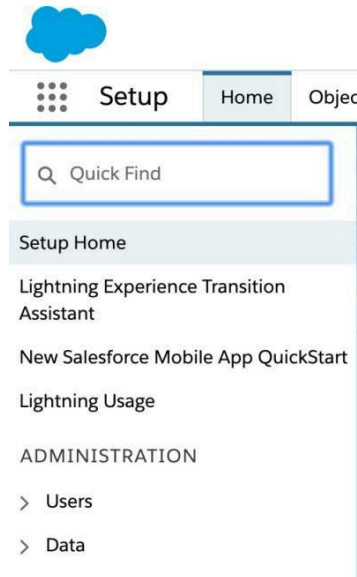
To receive the data from your School you will need to create a Force.com Site that will be called from the connected Schools to send data to Salesforce. This is a one-time configuration. If you already have a site you can skip ahead to the *Setup Site Permissions* section below.



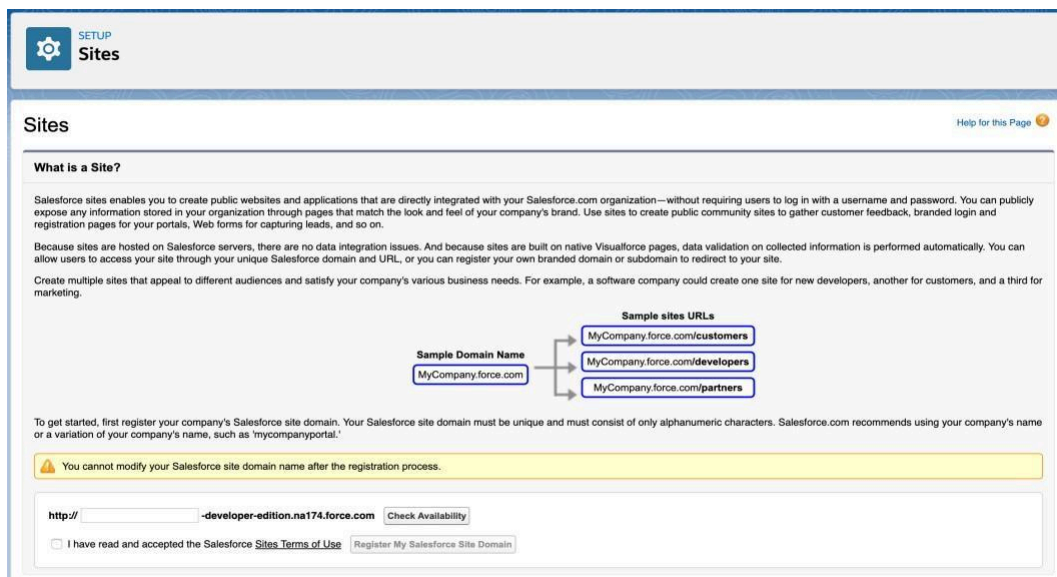
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## Create a new Force.com Site

1. From *Salesforce Setup Page* enter *Sites* in the *Quick Find* box, then navigate to *Sites*.

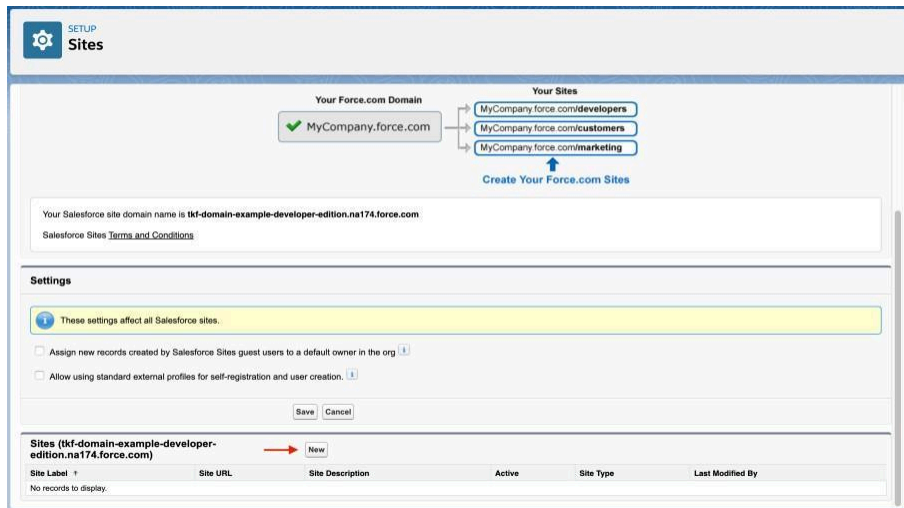


2. If you don't have a Site already created, register a custom Salesforce Sites domain for your organization. This domain will be used for all of your company's public Salesforce sites. To do so, input the site domain for your company and click on the *Check Availability* button. If the domain is available, check the *Sites Terms of Use* checkbox and click on the button to register the domain.



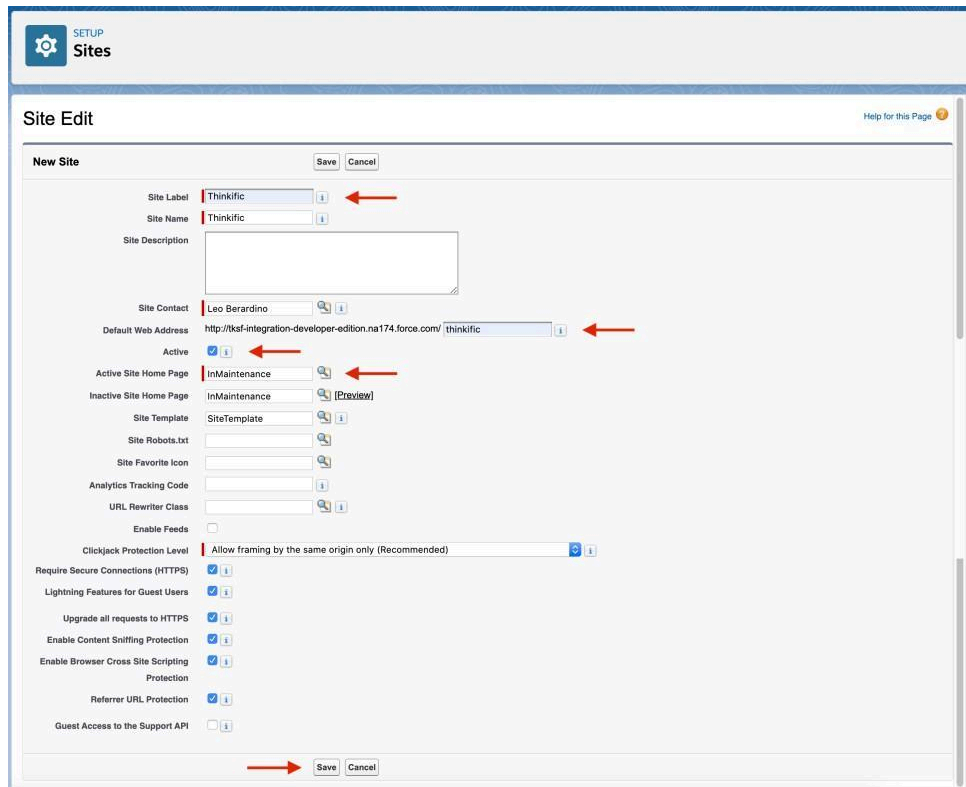
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3. Create a new site clicking on the **New** button.



4. In the new site creation form fill in the following values and save the configuration.

- Site Label: **Thinkific**
- Default Web Address: **thinkific**
- Active: **Checked**
- Active Site Home Page: **InMaintenance**

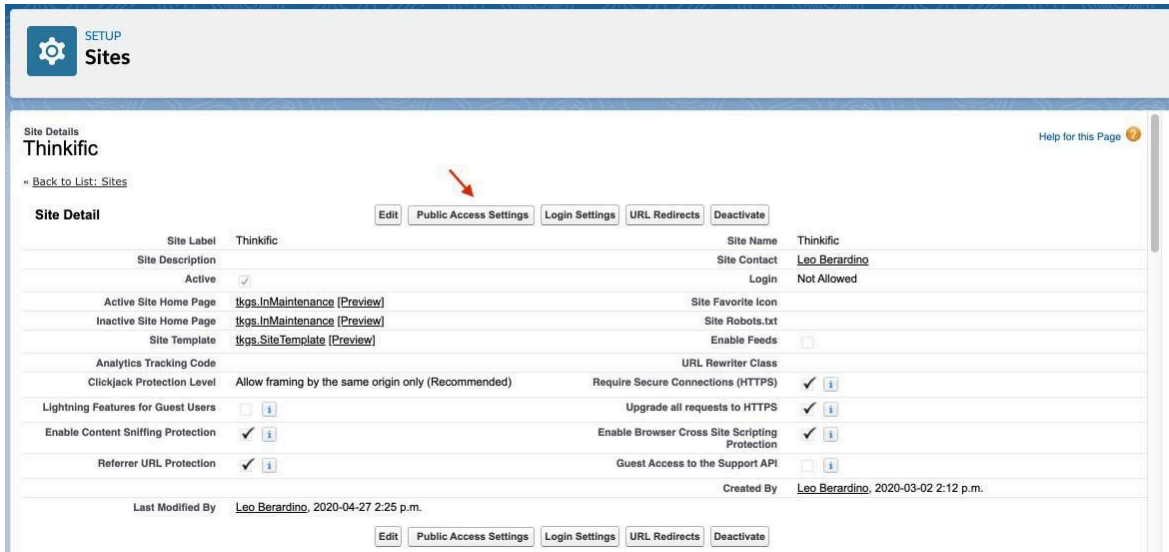


# THINKIFIC +

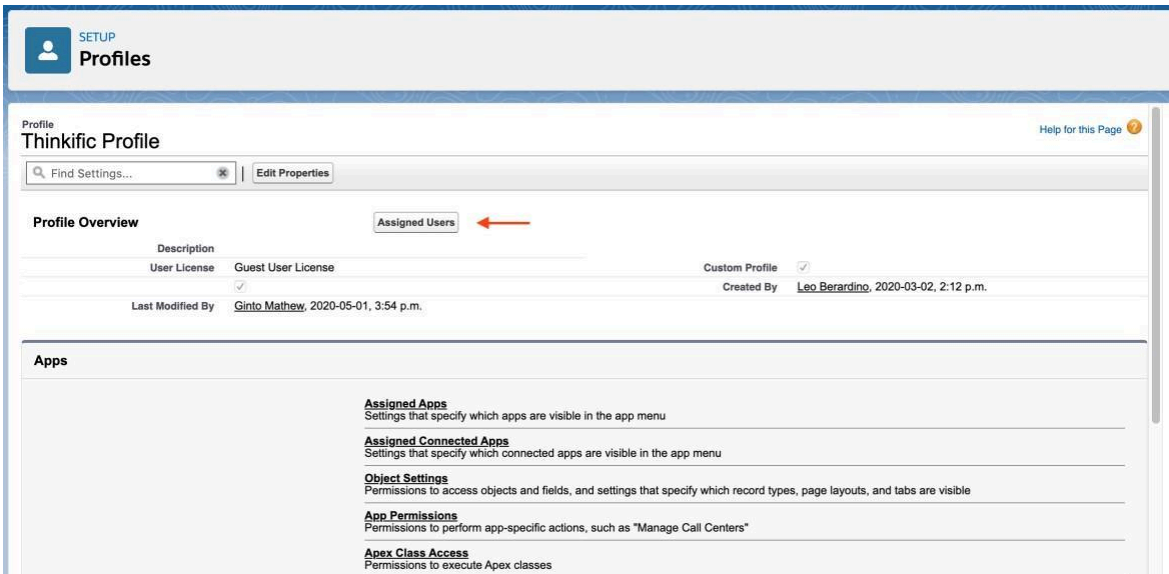
## Setup the Site Permissions

You're almost there! In this step, the Thinkific Salesforce Connector will receive access permission to the newly created site.

1. After saving the new site, you will be taken to the *Site Details* page. On this page click on the *Public Access Settings* button.

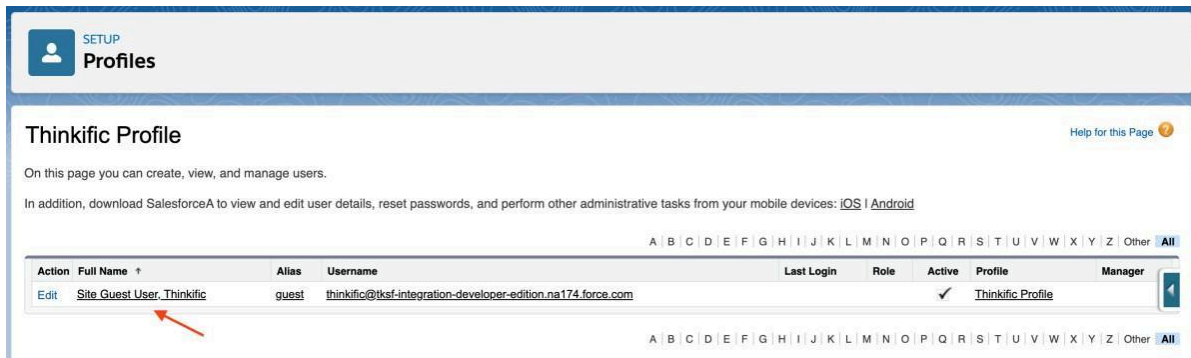


2. In the Thinkific profile page click on *Assigned Users* button.



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3. Click on the Site Guest User Full Name hyperlink.



**SETUP Profiles**

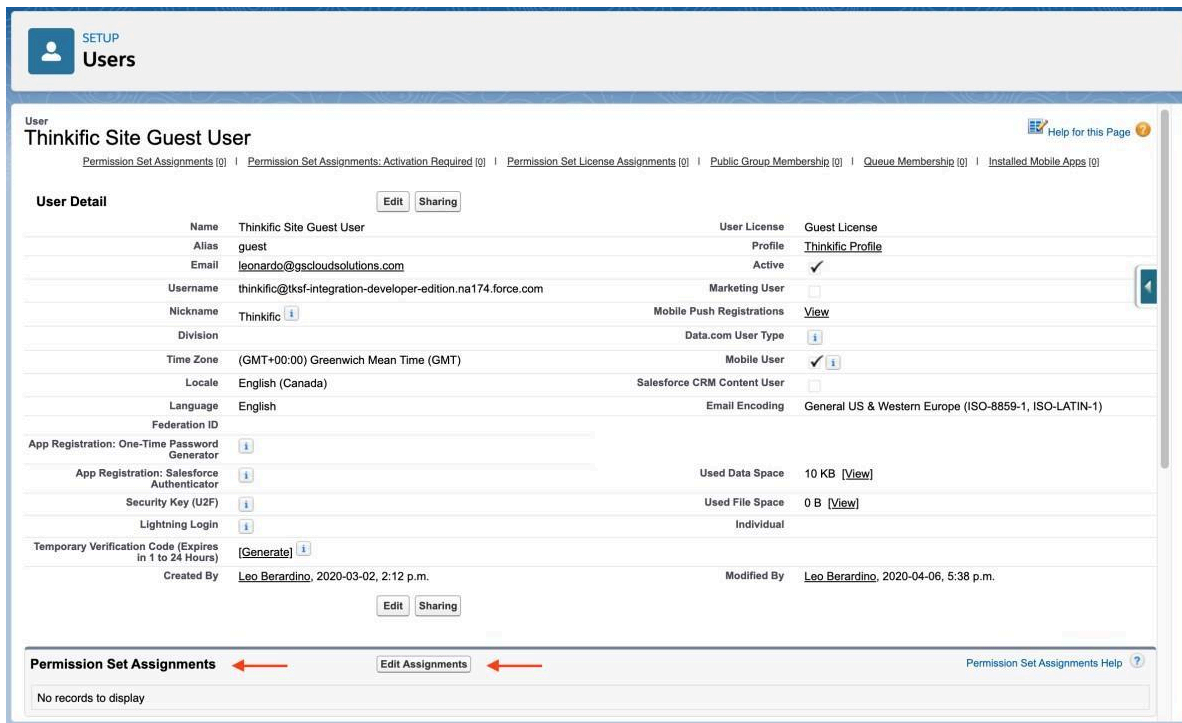
### Thinkific Profile

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
<a href="#">Edit</a>	<a href="#">Site Guest User, Thinkific</a>	guest	thinkific@tksf-integration-developer-edition.na174.force.com			<input checked="" type="checkbox"/>	Thinkific Profile	

4. Now, on the Site Guest User, go to the Permission Set Assignments section and click on the Edit Assignments button.



**SETUP Users**

### User Thinkific Site Guest User

[Permission Set Assignments \(0\)](#) | [Permission Set Assignments: Activation Required \(0\)](#) | [Permission Set License Assignments \(0\)](#) | [Public Group Membership \(0\)](#) | [Queue Membership \(0\)](#) | [Installed Mobile Apps \(0\)](#)

**User Detail** [Edit](#) [Sharing](#)

Name	Thinkific Site Guest User	User License	Guest License
Alias	guest	Profile	<a href="#">Thinkific Profile</a>
Email	<a href="mailto:leonardo@gsccloudsolutions.com">leonardo@gsccloudsolutions.com</a>	Active	<input checked="" type="checkbox"/>
Username	thinkific@tksf-integration-developer-edition.na174.force.com	Marketing User	<input type="checkbox"/>
Nickname	Thinkific	Mobile Push Registrations	<a href="#">View</a>
Division		Data.com User Type	<a href="#">i</a>
Time Zone	(GMT+00:00) Greenwich Mean Time (GMT)	Mobile User	<input checked="" type="checkbox"/> <a href="#">i</a>
Locale	English (Canada)	Salesforce CRM Content User	<input type="checkbox"/>
Language	English	Email Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)
Federation ID			
App Registration: One-Time Password Generator	<a href="#">i</a>	Used Data Space	10 KB <a href="#">View</a>
App Registration: Salesforce Authenticator	<a href="#">i</a>	Used File Space	0 B <a href="#">View</a>
Security Key (U2F)	<a href="#">i</a>	Individual	
Lightning Login	<a href="#">i</a>		
Temporary Verification Code (Expires in 1 to 24 Hours)	<a href="#">(Generate)</a> <a href="#">i</a>		
Created By	<a href="#">Leo Berardino</a> , 2020-03-02, 2:12 p.m.	Modified By	<a href="#">Leo Berardino</a> , 2020-04-06, 5:38 p.m.

[Edit](#) [Sharing](#)

**Permission Set Assignments** [←](#) [Edit Assignments](#) [←](#) [Permission Set Assignments Help](#) [?](#)

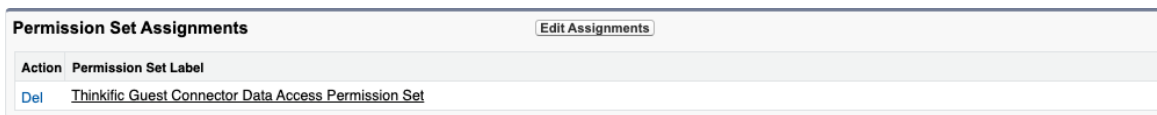
No records to display

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5. Select the *Thinkific Guest Connector Data Access Permission Set* on the *Available Permission Sets* list and click on the *Add* button. After enabling the permission set, click on the *Save* button.



6. The new permission set should be shown on the *Permission Set Assignments* section.

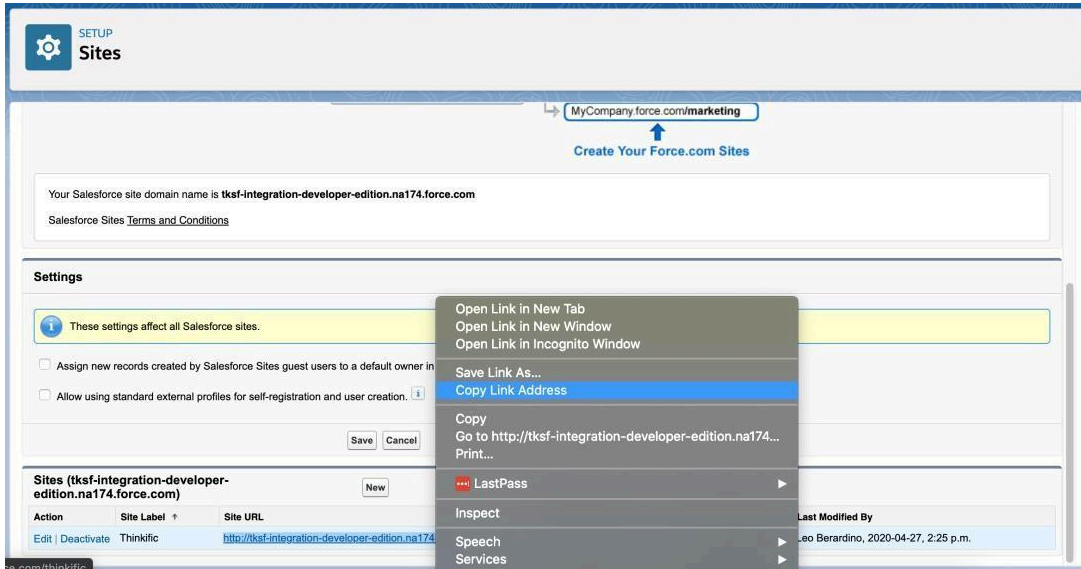


7. This is the last configuration step if you are *updating the connector to a new version*.

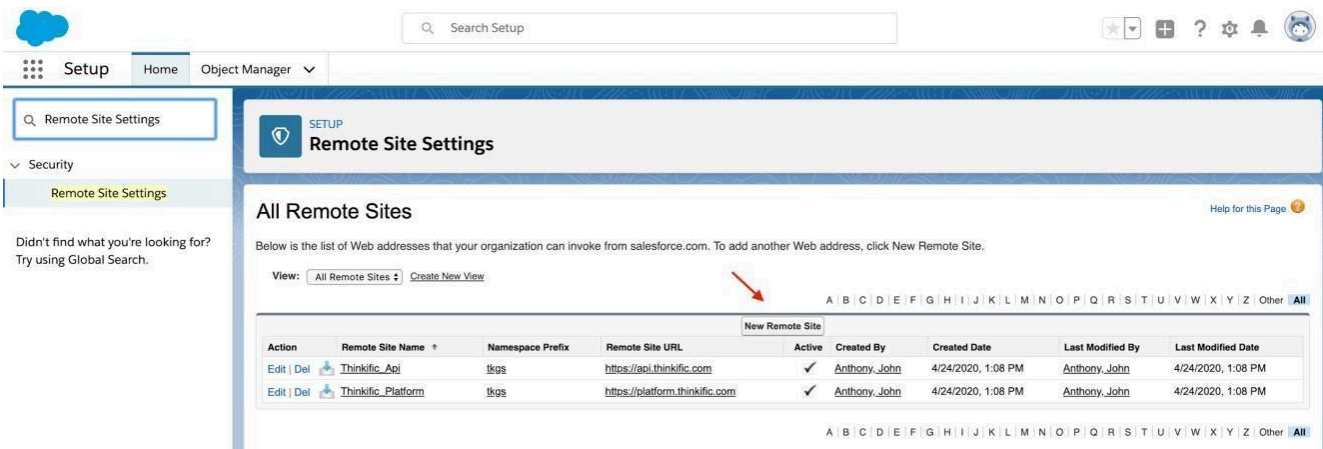


## Enable access for your newly created Force.com Site

1. Go again to the **Salesforce Sites** page typing **Sites** in the **Quick Find** input box of the Salesforce Setup. Your new Force.com site will be listed on this page.
2. Copy your Force.com site URL clicking over the link in the **Site URL** column with the right button of the mouse and click on **Copy Link Address** option. Now your new site URL was copied to the clipboard.



3. On the **Salesforce Setup Quick Find** input box type **Remote Site Settings** and access this page. Click on the **New Remote Site** button.



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4. Fill in the remote site configuration following the below instructions.
  - Remote Site Name: **Thinkific\_Site**
  - Remote Site URL: Paste your Force.com site URL copied from the site's configuration page. **Be sure that the URL protocol is HTTPS instead of HTTP!**
  - Active: **Checked**
  - Click on the Save button.

SETUP  
Remote Site Settings

### Remote Site Edit

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

Remote Site Edit Save Save & New Cancel

Remote Site Name

Remote Site URL

Disable Protocol Security

Description

Active

Save Save & New Cancel

## Save and Verify your Force.com Site on the Connector Configuration Page

Now all Force.com Site configuration is ready. It's time to save your Force.com Site URL in the Thinkific Connector Configuration.

1. Open the Thinkific Salesforce Connector Lightning Application
2. In the **Package Setup** tab paste your **Force.com Site URL** in the input box.

Package Setup

Settings Editor  
Thinkific - Salesforce Connector

Next Step

**Set up the Site & Add it**

This site will be used to expose the webservice endpoints. You can add more schools information to this URL once you finish the Setup. If you don't have the Force.com Site URL, please reference the instruction set below.

*Note : Once the Force.com URL is set, it cannot be changed and all following school connection settings will use this URL*

\*Force.com Site URL

Verify URL Save

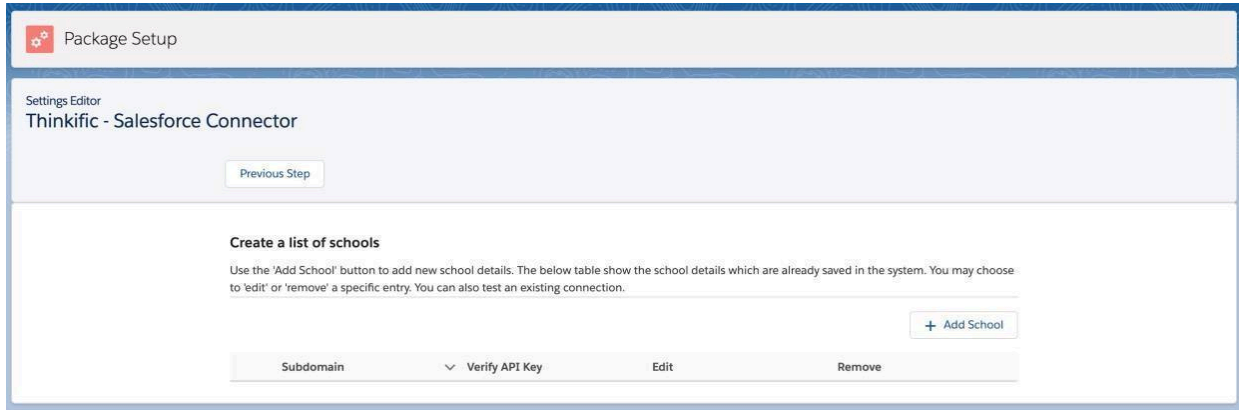
3. Click on the **Verify URL** button and, after the verification, on the **Save** button. P.S.: If the URL verification URL fails, review the Force.com Site configuration steps.
4. Click on the **Next Step** button.

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## 2) Setup the School connection

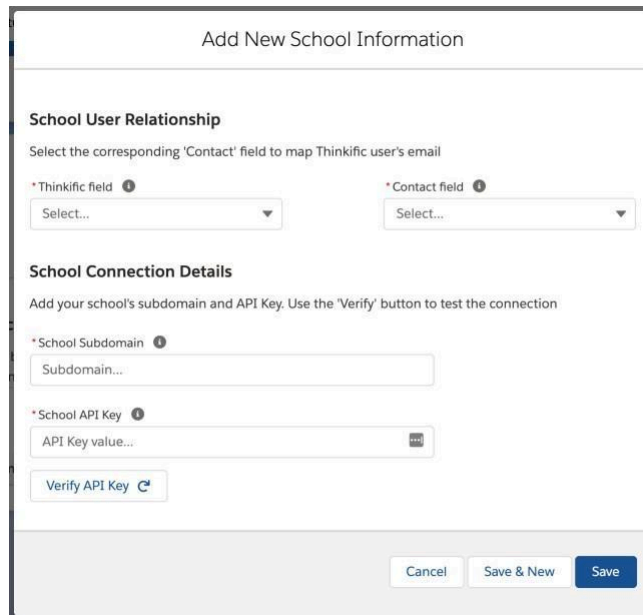
Now it's time to connect your Salesforce Org to all your Thinkific Schools. After clicking on the **Next Step**

button in the last step, you will see the below page.



## Connecting to a School

1. Click on the **Add School** button.

The screenshot shows the 'Add New School Information' form. It is divided into two main sections: 'School User Relationship' and 'School Connection Details'.  
**School User Relationship:** This section asks to 'Select the corresponding 'Contact' field to map Thinkific user's email'. It contains two dropdown menus: '\* Thinkific field' and '\* Contact field', both currently set to 'Select...'.  
**School Connection Details:** This section asks to 'Add your school's subdomain and API Key. Use the 'Verify' button to test the connection'. It contains three input fields: '\* School Subdomain' (with 'Subdomain...' as a placeholder), '\* School API Key' (with 'API Key value...' as a placeholder and a password icon), and a 'Verify API Key' button with a refresh icon.  
At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

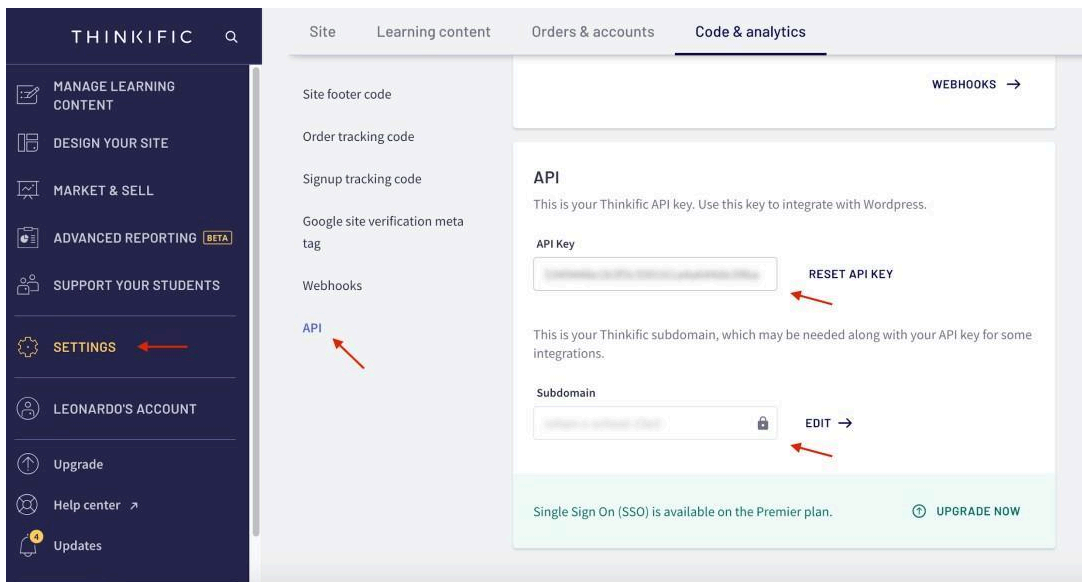
2. Fill in School User Relationship:

This configuration will define what fields will be used to link a School Student User to an existing Salesforce Contact. If no Contact is found for a new School Student User, the record will be created without a link to a Salesforce Contact. Orphans records could be linked to Contacts in the [Student Users tab of the Connector Lightning Application](#).

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3. Fill in School Connection Details: The Thinkific *School Subdomain* and *API Key*.

To get that information go to the *school manager page* and access the **SETTINGS** menu option > **Code & Analytics** > **API**



4. Click on **Verify API Key** button
5. Click on **Save** button
6. Repeat those steps for all schools

Now your Salesforce Thinkific Connector is ready to receive data from the connected schools.

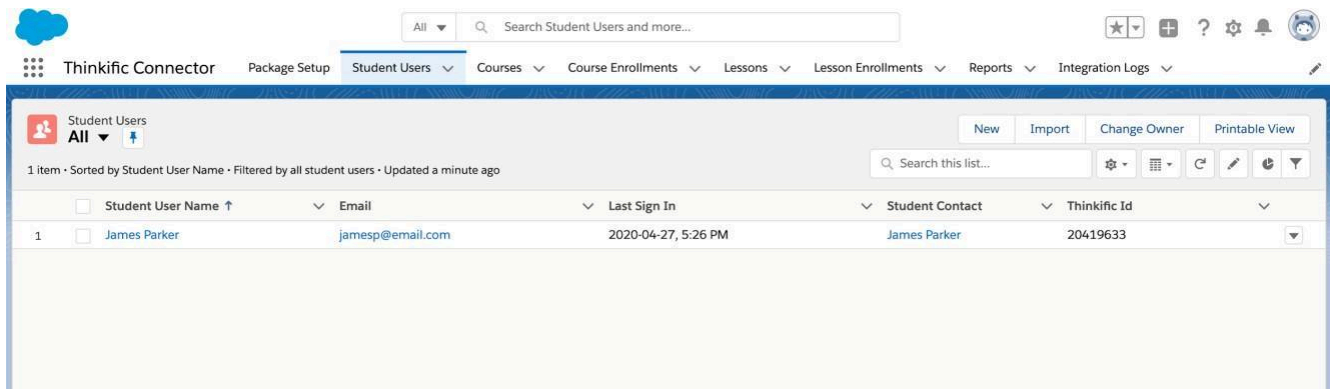
## Thinkific Connector Lightning Application in Details

The Thinkific Connector Lightning Application allows the Salesforce users to access the connected Schools data like Students registered, Courses, Lessons, Enrollments and Enrollments progress. That information can be accessed through the Thinkific Connector Lightning Application tabs.

### Student User Tab

Shows the Student Users registered on the connected Schools and the user Creation and Last Sign In Date.

The Student User is created in Salesforce every time a new user is created on a School or when a non- existing user in Salesforce logs on a School.

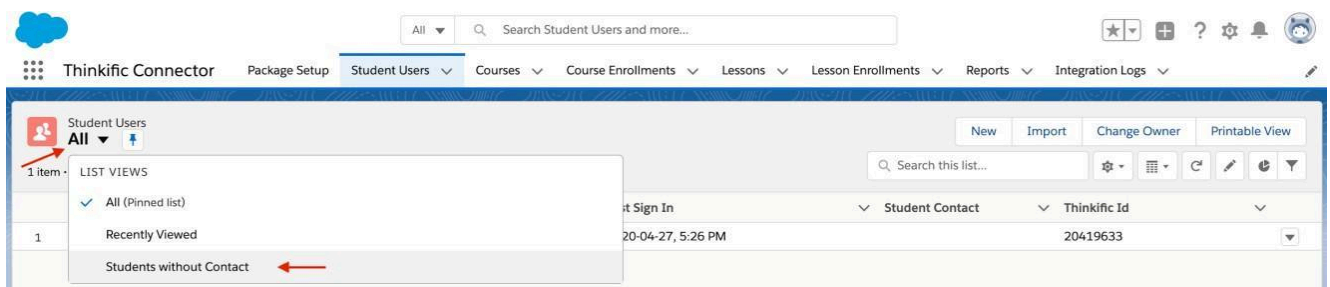


### Linking orphan Student Users with Salesforce Contacts

In this tab is also possible to link orphan Student User with Salesforce Contacts.

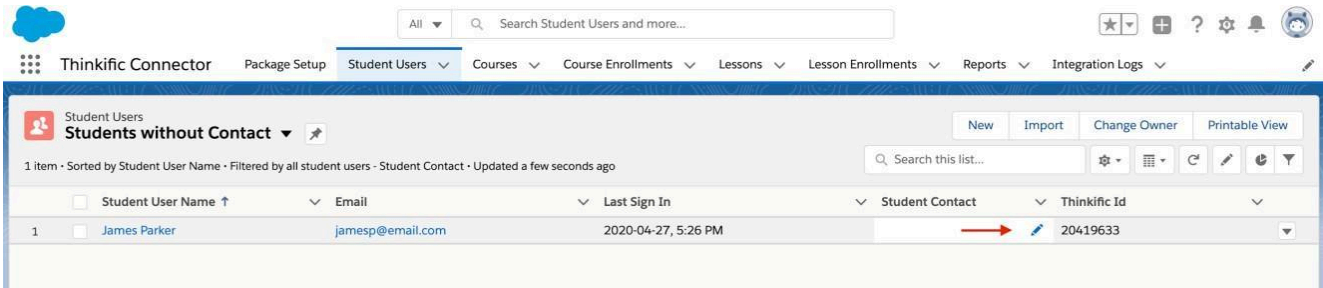
To link a Student User with a Contact follow instructions:

1. Select the Students without Contact list view

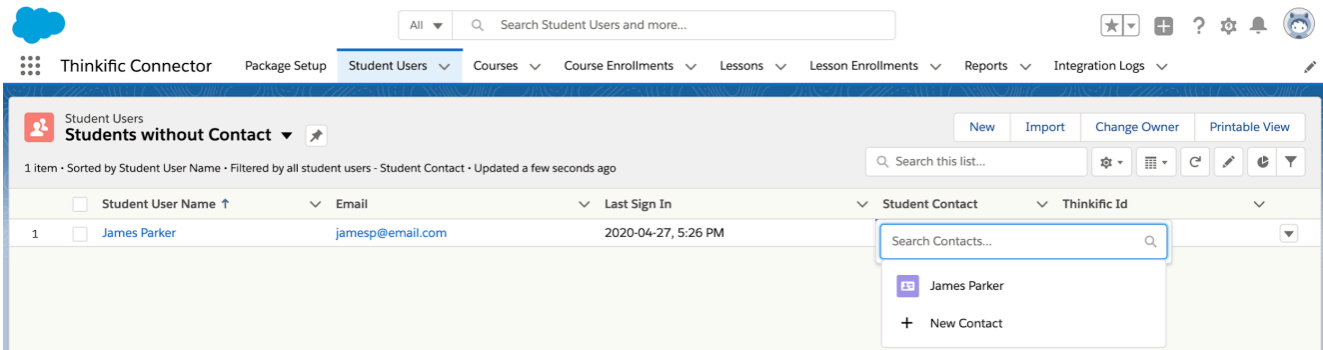


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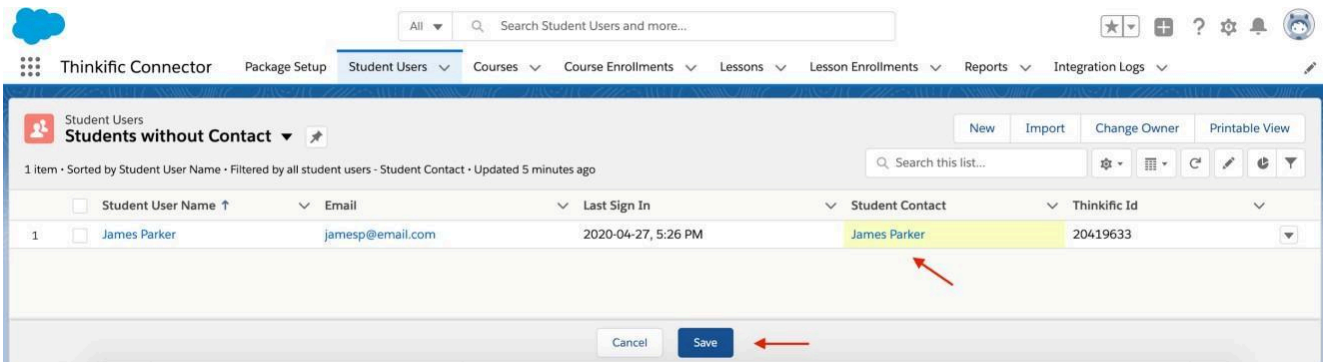
2. Click on the Student Contact edit button



3. Select an existing Contact or create a new one.



4. Save the Student User record.



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## Courses Tab

Shows the connected Schools courses.

A course is created in the Salesforce Org every time a Course is created in a School or if a School sends a new Course enrollment or Lesson completion for a non-existent Course.

Thinkific Connector Package Setup Student Users Courses Course Enrollments Lessons Lesson Enrollments Reports Integration Logs

Courses All

1 item - Sorted by Course Name - Filtered by all courses - Updated 2 minutes ago

	Course Name ↑	Site	Slug	Thinkific Id	Owner First Name	Owner Last Name
1	The Thinkific Fast Track Demo	rohan-s-school-15e3	the-thinkific-fast...	629379	Thinkific	Site Guest User

## Course Enrollment Tab

Show the Student users course enrollments and their progress and completion date.

Thinkific Connector Package Setup Student Users Courses Course Enrollments Lessons Lesson Enrollments Reports Integration Logs

Course Enrollments All

1 item - Sorted by Course Enrollment Name - Filtered by all course enrollments - Updated a few seconds ago

	Course Enrollme... ↑	Course	Progress	Student User	Thinkific Id	Created At	Comple...	Comple...
1	ENROL-00563	The Thinkific Fast Track Demo	37.50%	James Parker	58141520	2020-04-24, 1:43 PM	<input type="checkbox"/>	

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## Lessons Tab

Shows the Course Lessons and their type.

	Lesson Name ↑	Course	Thinkific Id	Type	Created Date	Last Modified Date
1	Adding your lessons	The Thinkific Fast Track Demo	10886007	Video	2020-04-27, 5:27 PM	2020-04-27, 5:27 PM
2	Before you begin...	The Thinkific Fast Track Demo	10885997	IFrame	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
3	Before you begin...	The Thinkific Fast Track Demo	10885998	Survey	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
4	Creating your online course	The Thinkific Fast Track Demo	10886006	Video	2020-04-27, 5:27 PM	2020-04-27, 5:27 PM
5	Get the Fast Track Workbook!	The Thinkific Fast Track Demo	10886002	Download	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
6	How to use this course	The Thinkific Fast Track Demo	10885995	Lesson	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
7	How to use this course	The Thinkific Fast Track Demo	10886001	Download	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
8	Thinkific examples	The Thinkific Fast Track Demo	10885999	HtmlItem	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
9	Welcome to the Thinkific Fast Track!	The Thinkific Fast Track Demo	10885994	Lesson	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
10	Welcome to Thinkific	The Thinkific Fast Track Demo	10886004	Video	2020-04-27, 5:27 PM	2020-04-27, 5:27 PM
11	What is Thinkific?	The Thinkific Fast Track Demo	10885996	Lesson	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
12	What is Thinkific?	The Thinkific Fast Track Demo	10886000	HtmlItem	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
13	Your coming soon page	The Thinkific Fast Track Demo	10886005	Video	2020-04-27, 5:27 PM	2020-04-27, 5:27 PM

## Lessons Enrollment Tab

Shows the Lessons completed by the Student Users.

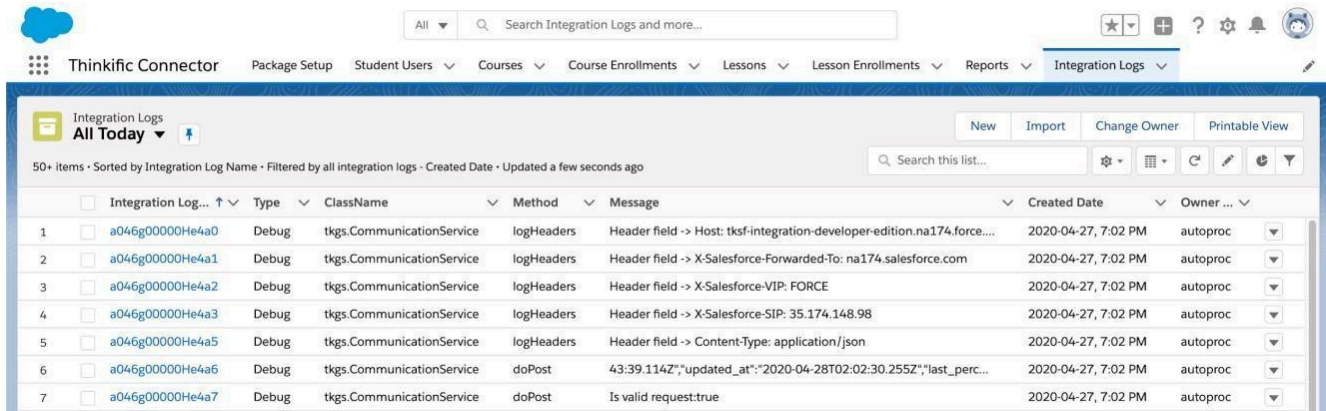
	Lesson Enrollment Name ↑	Course Enrollment	Created At	Lesson	Completed
1	LES-ENR-00324	ENROL-00563	2020-04-27, 5:27 PM	Welcome to Thinkific	✓
2	LES-ENR-00325	ENROL-00563	2020-04-27, 5:27 PM	Your coming soon page	✓
3	LES-ENR-00326	ENROL-00563	2020-04-27, 5:27 PM	Creating your online course	✓
4	LES-ENR-00327	ENROL-00563	2020-04-27, 5:27 PM	Adding your lessons	✓



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## Integration Logs Tab

Shows the integration logs. The logs are captured only if the logger configuration is enabled.



Integration Logs

All Today

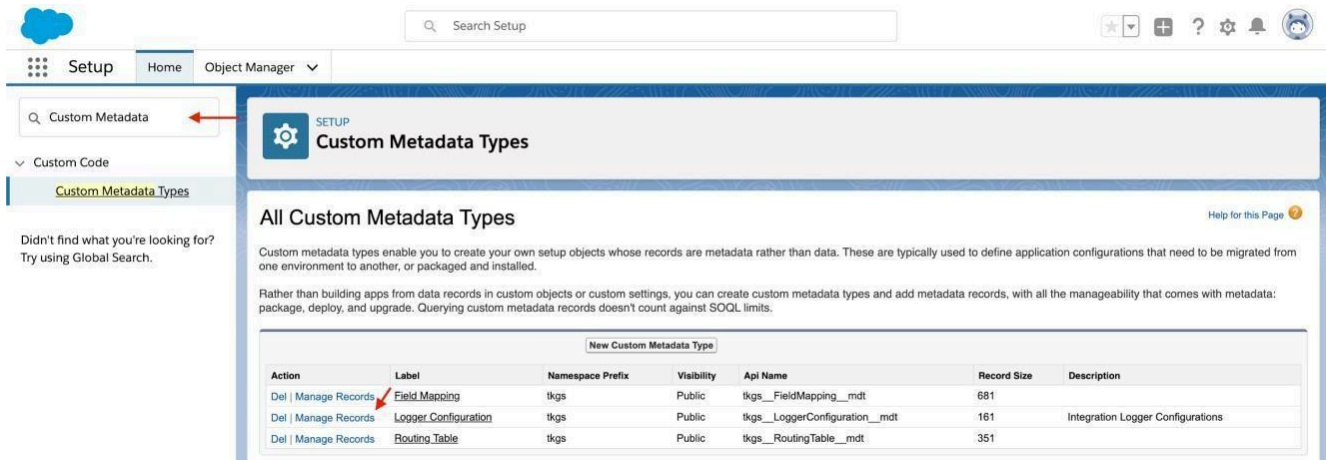
50+ items · Sorted by Integration Log Name · Filtered by all integration logs · Created Date · Updated a few seconds ago

Integration Log...	Type	ClassName	Method	Message	Created Date	Owner ...
1 a046g00000He4a0	Debug	tkgs.CommunicationService	logHeaders	Header field -> Host: tksf-integration-developer-edition.na174.force....	2020-04-27, 7:02 PM	autoproc
2 a046g00000He4a1	Debug	tkgs.CommunicationService	logHeaders	Header field -> X-Salesforce-Forwarded-To: na174.salesforce.com	2020-04-27, 7:02 PM	autoproc
3 a046g00000He4a2	Debug	tkgs.CommunicationService	logHeaders	Header field -> X-Salesforce-VIP: FORCE	2020-04-27, 7:02 PM	autoproc
4 a046g00000He4a3	Debug	tkgs.CommunicationService	logHeaders	Header field -> X-Salesforce-SIP: 35.174.148.98	2020-04-27, 7:02 PM	autoproc
5 a046g00000He4a5	Debug	tkgs.CommunicationService	logHeaders	Header field -> Content-Type: application/json	2020-04-27, 7:02 PM	autoproc
6 a046g00000He4a6	Debug	tkgs.CommunicationService	doPost	43-39.114Z";updated_at":"2020-04-28T02:02:30.255Z";last_perc...	2020-04-27, 7:02 PM	autoproc
7 a046g00000He4a7	Debug	tkgs.CommunicationService	doPost	Is valid request:true	2020-04-27, 7:02 PM	autoproc

## Enabling / Disabling Integration Logs

For enabling or disabling the log capture it's necessary to change the log capture level.

1. From the Salesforce Setup page type *Custom Metadata* in the Quick Find input box and open the *Custom Metadata Types* page. Click on *Logger Configuration Manage Records* hyperlink.



Setup

Search Setup

Custom Metadata

Custom Metadata Types

All Custom Metadata Types

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

Action	Label	Namespace Prefix	Visibility	Api Name	Record Size	Description
Del   Manage Records	Field Mapping	tkgs	Public	tkgs__FieldMapping__mdt	681	
Del   Manage Records	Logger Configuration	tkgs	Public	tkgs__LoggerConfiguration__mdt	161	Integration Logger Configurations
Del   Manage Records	Routing Table	tkgs	Public	tkgs__RoutingTable__mdt	351	

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2. Click on the Logger Configuration Edit hyperlink.



SETUP Custom Metadata Types

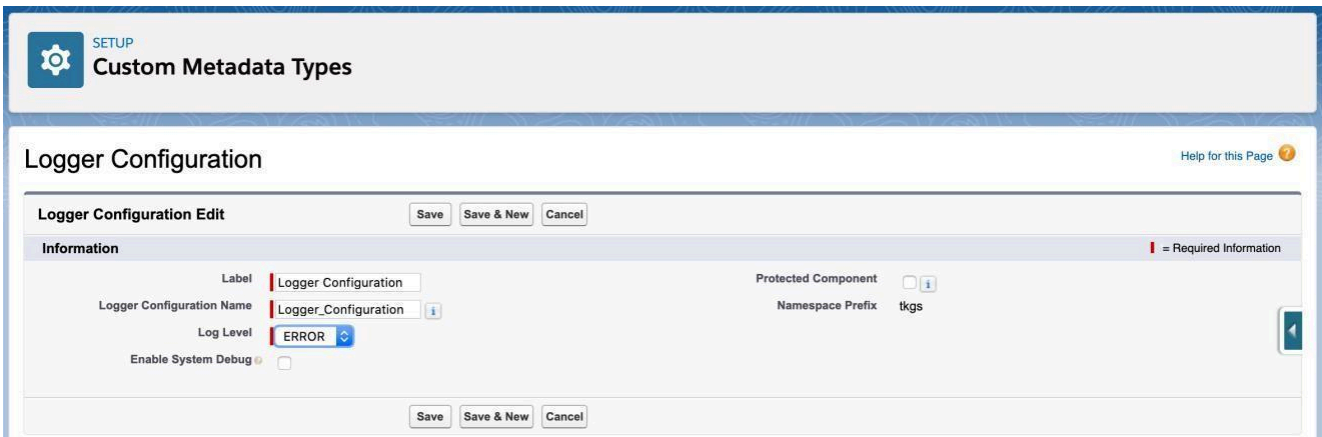
### Logger Configurations

View: All | Edit | Create New View

Action	Label	Logger Configuration Name	Namespace Prefix	Log Level	Enable System Debug
<a href="#">Edit</a>   <a href="#">Del</a>	Logger_Configuration	Logger_Configuration	tkgs	ERROR	<input type="checkbox"/>

3. Change the Log Level to Trace, Debug, Info, Warning or Error to enable the log or to None to disable it.

**Important: Enabling log capturing in production environments should be done with caution because of its high data storage consumption and also leads Platform Events Consumption. The log level should be ideally kept on Error (default) or None levels only being changed to another level for error debugging purposes.**



SETUP Custom Metadata Types

### Logger Configuration

Logger Configuration Edit

Save Save & New Cancel

Information ! = Required Information

Label  Protected Component  [?](#)

Logger Configuration Name  [?](#) Namespace Prefix

Log Level  [?](#)

Enable System Debug

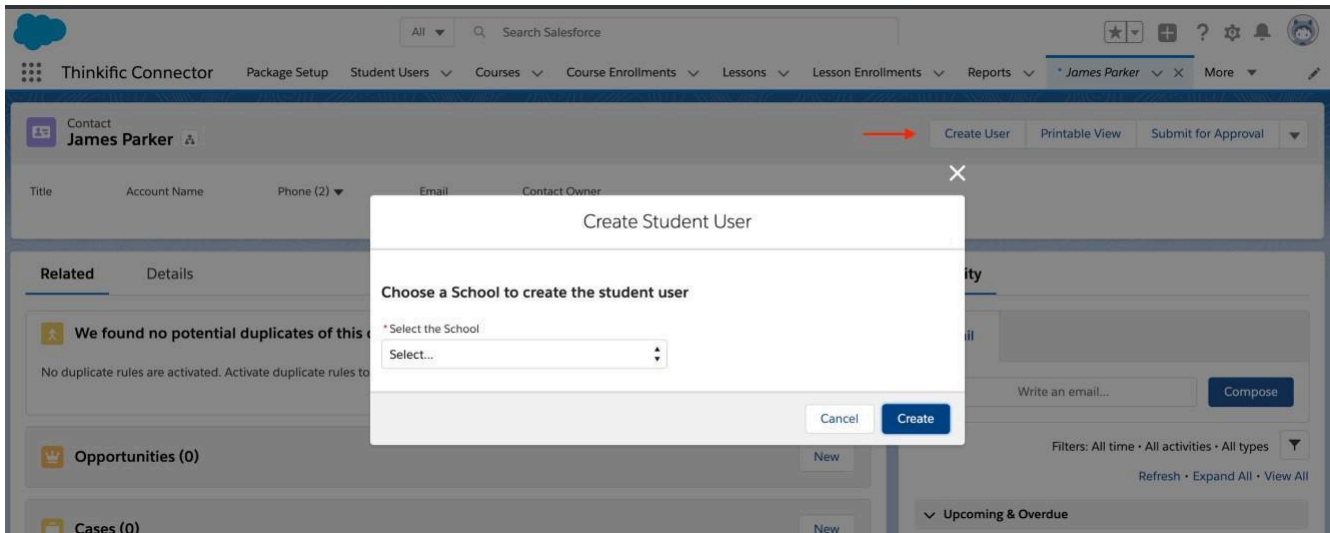
Save Save & New Cancel

4. Save the Logger Configuration clicking on the *Save* button.

## Contact Quick Action Button to Create Student User

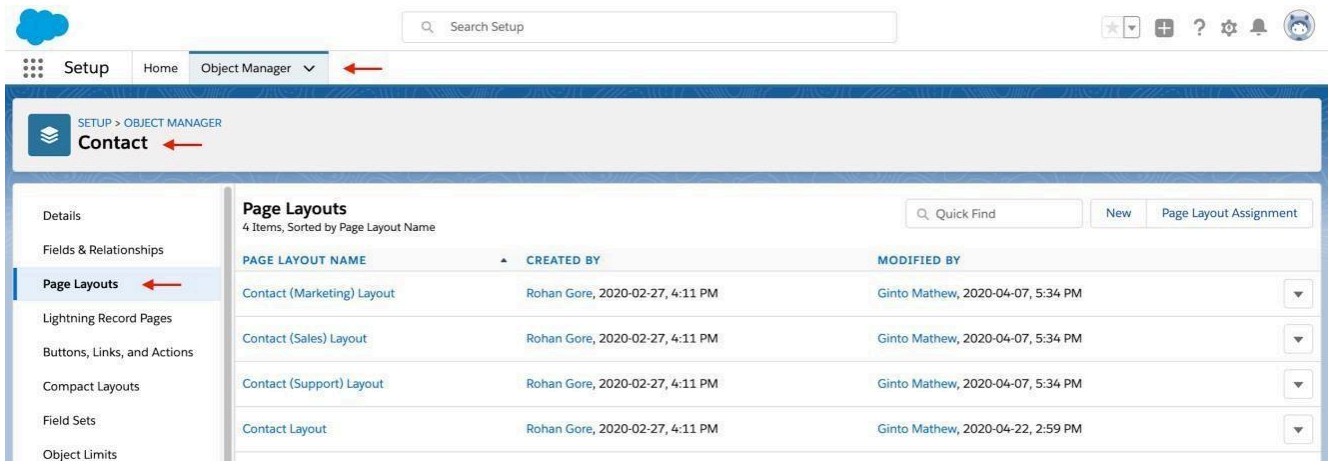
The Contact Quick Action Button allows the Salesforce users to create new Student Users in the connected Schools in Thinkific directly from the Salesforce Org.

This button can be added on the Contact Record Page and uses the Contact Email field mapped during the Connector setup, the First and the Last Names to create the user remotely.



## Adding the Quick Action Button on Contact Record page

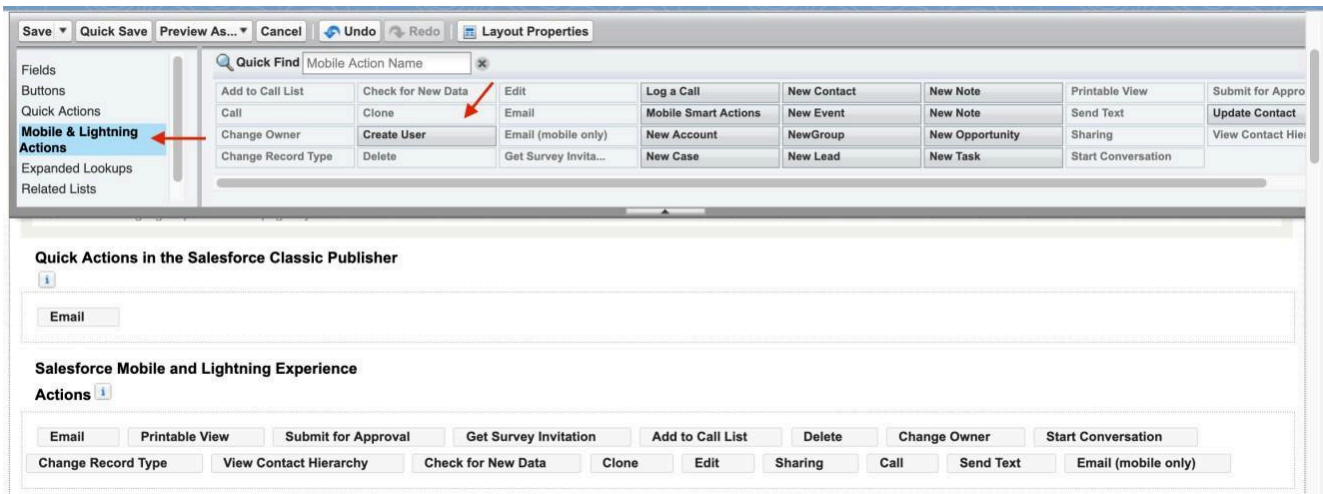
1. In the Salesforce Setup click on *Object Manager Tab*, click on the *Contact* object and after opening the Contact configuration page click on *Page Layouts*.



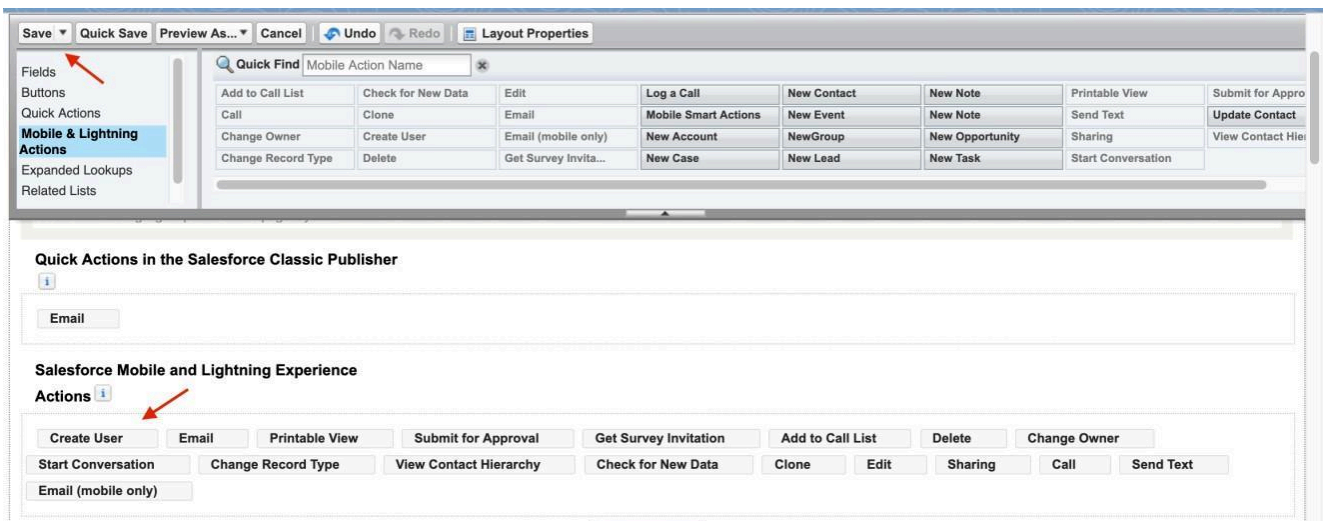
2. Choose the layout to add the Quick Action and edit it.

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3. Click on Mobile & Lightning Actions.

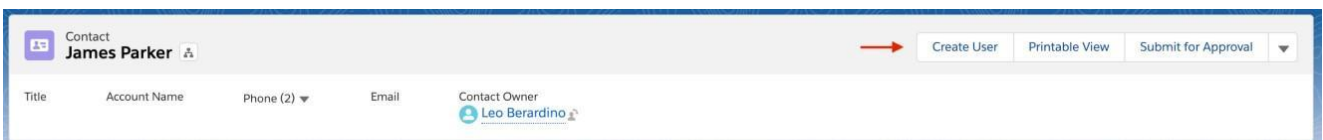


4. Drag the Create User quick action button and drop it into the Salesforce Mobile and Lightning Experience Actions section.



5. Click on the Save button.

6. The Create User button will be shown on the Contact record page as follows.



## Creating Reports with Schools data

Before starting to create reports it's necessary to understand the Thinkific Connector data model and how School data is stored in Salesforce.

### School data custom objects

The School data is stored in six custom objects:

#### **Site**

It stores Thinkific School data. Each Site represents a Thinkific School and has Student Users and Courses.

#### **Course**

It stores Thinkific School Course data.

Each Course is comprised of Lessons.

#### **Lesson**

It stores Thinkific School Lesson data.

#### **Student User**

It stores Thinkific School User data.

Each Student User is of one Site (School) and it can have zero or more Course Enrollments.

#### **Course Enrollment**

It stores the Student User progress, enrollment date and completion data of a specific Course.

#### **Lesson Enrollment**

It stores the Student User lesson completion of a Course Enrollment.

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## Default Reports Types

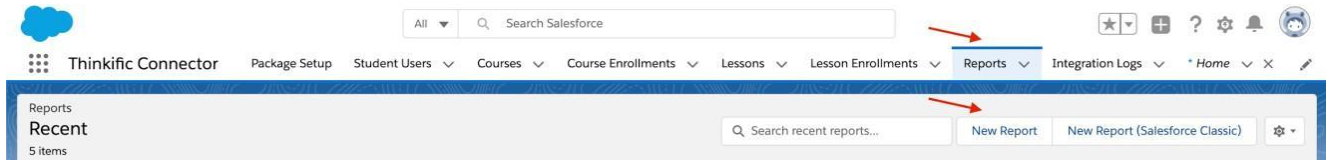
The Thinkific Connector package comes with 13 report types:

- Courses
- Courses with Site
- Lesson Enrollments
- Lesson Enrollments with Course Enrollment
- Lesson Enrollments with Lesson
- Lessons
- Lessons with Course
- Sites
- Student Users
- Student Users with Course Enrollments
- Student Users with Course Enrollments and Course
- Student Users with Site
- Student Users with Student Contact

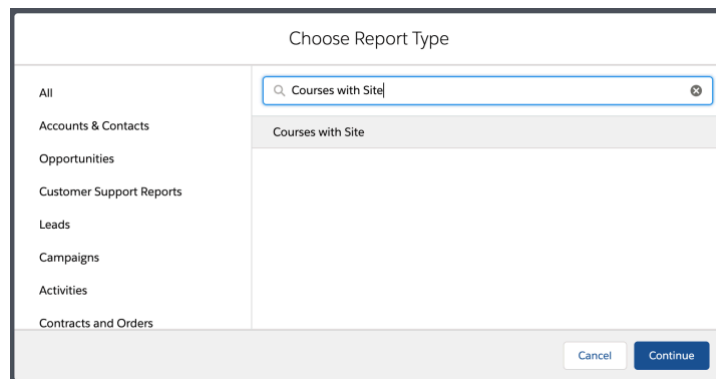
## Creating a report

For this example we will create a Course report by Site (Schools).

1. Go to the [Thinkific Connector Lightning Application](#) and click on the *Reports* tab then click on *New Report* button.



2. Choose the *Course with Site* report type and click on the *Continue* button.



### 3. Change the report filter from *Show me My courses* to *Show me All courses*.

The screenshot shows the 'Filters' section of a report titled 'New Courses with Site Report'. The 'Show Me' filter is currently set to 'My courses'. An 'Edit Filter' dialog box is open, showing a dropdown menu with 'All courses' selected. Red arrows point to the 'Filters' tab and the 'All courses' option.

### 4. Add the *Site Name* in Grouped Columns Fields Group.

The screenshot shows the 'Fields' section of a report titled 'New Courses with Site Report'. The 'Site: Site Name' field is added to the 'GROUP COLUMNS' section. A table preview is visible showing columns for 'Site: Site Name' and 'Course: Course Name'. Red arrows point to the 'Fields' tab and the 'Site: Site Name' field.

Site: Site Name	Course: Course Name
rohan-s-school-15e3 (5)	In Home Workout
	Course 2
	Course 1
	The Thinkific Fast Track Demo
	Introduction to JavaScript
Subtotal	
Total (5)	

### 5. Change the Report Name and click on the *Save & Run* button.

The screenshot shows the report name changed to 'Courses by School'. The 'Save & Run' button is highlighted with a red arrow.

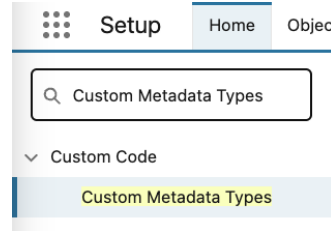


## School x Salesforce Data Mapping

The Thinkific Connector uses a data mapping framework to map the data received from the school portal to the connector Salesforce objects. The mapping configuration is available on Salesforce as a Custom Metadata called Field Mapping.

To access the mapping configuration:

- 1) Open the *Salesforce Setup Page*
- 2) Search for *Custom Metadata Types*
- 3) Click on *Manage Records* of the *Field Mapping* custom metadata



New Custom Metadata Type				
Action	Label	Namespace Prefix	Visibility	API Name
Del   <a href="#">Manage Records</a>	<a href="#">Field Mapping</a>		Public	FieldMapping__mdt
Del   <a href="#">Manage Records</a>	<a href="#">Logger Configuration</a>		Public	LoggerConfiguration__mdt
Del   <a href="#">Manage Records</a>	<a href="#">Routing Table</a>		Public	RoutingTable__mdt

The field mapping is defined as following:

- Source: The webhook source entity and the JSON field path
- Target: The target Salesforce Object and Field

### Field Mapping

The screenshot shows the 'Field Mapping Detail' page in Salesforce. It includes buttons for 'Edit', 'Delete', and 'Clone'. The 'Label' is 'CourseEnrollment.User.FirstName' and 'Protected Component' is checked. The 'Field Mapping Name' is 'CourseEnrollment\_User\_FirstName' and the 'Namespace Prefix' is empty. Under the 'Source' section, the 'Source Entity' is 'enrollment' and the 'Source Property' is 'payload.user.first\_name'. Under the 'Target' section, the 'Target Object' is 'Student User' and the 'Target Field' is 'First Name'. There are also fields for 'Created By' and 'Last Modified By'.