THINKIFIC +

Thinkific Salesforce Connector

User Guide

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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

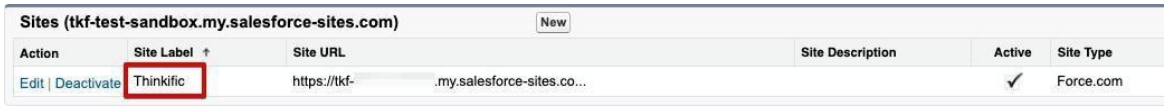
Since the Winter '21 release, Salesforce reduced the permission available for Guest Users (see Salesforce release notes). Due to these changes, the connector permissions have been updated to support the new Salesforce security requirements. Some steps are required before and after upgrading the connector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

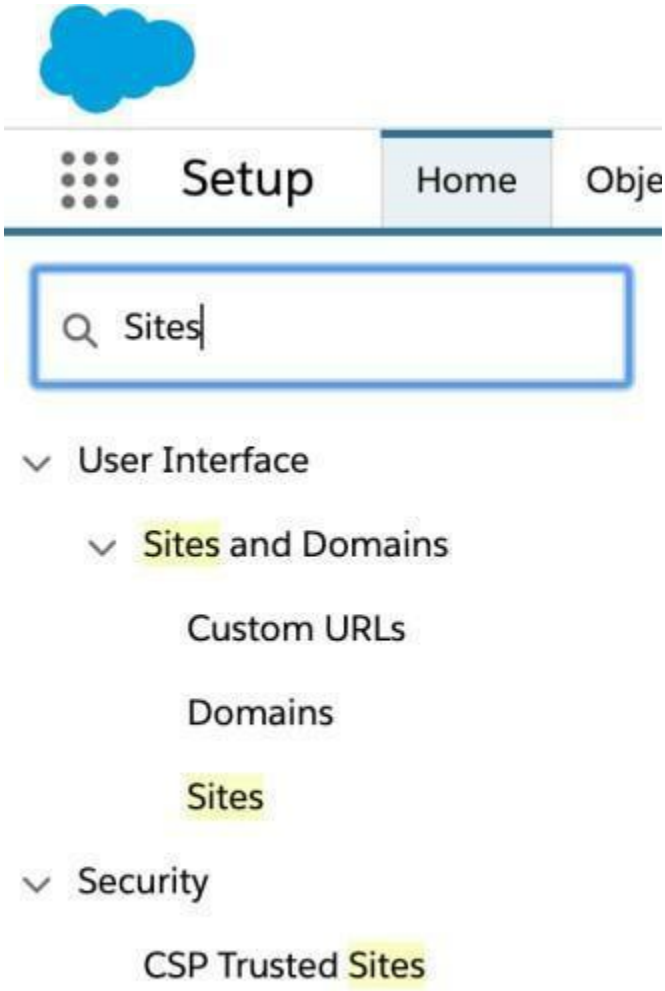
Before Updating the Package

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

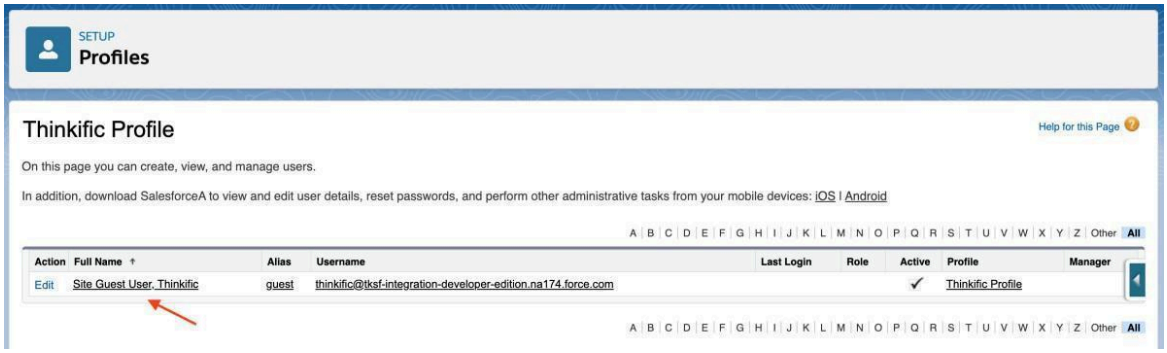
NOTE: The synchronization will stop working while the configuration and update are not completed

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

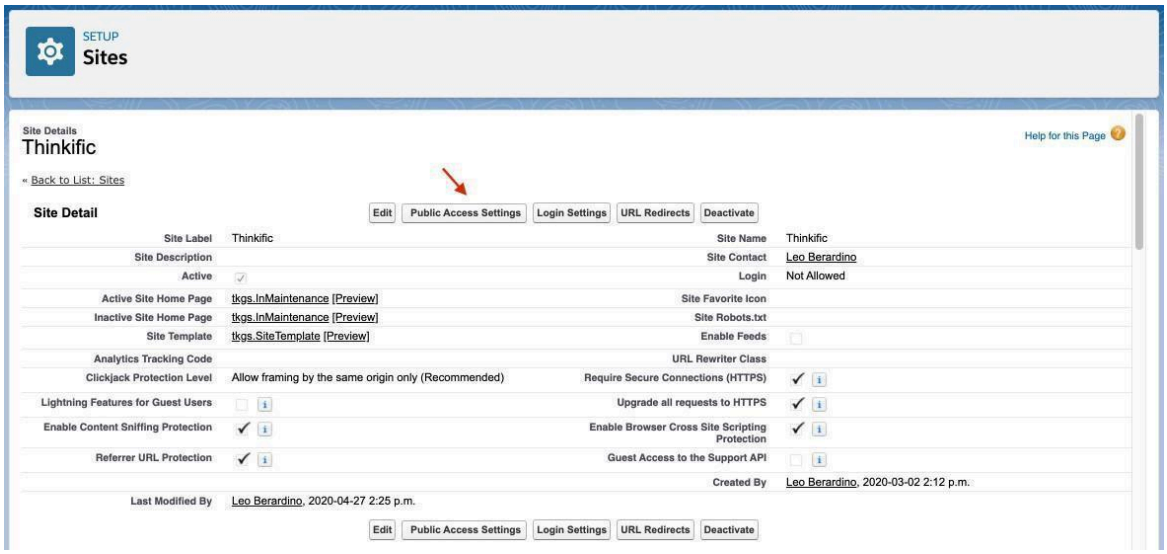




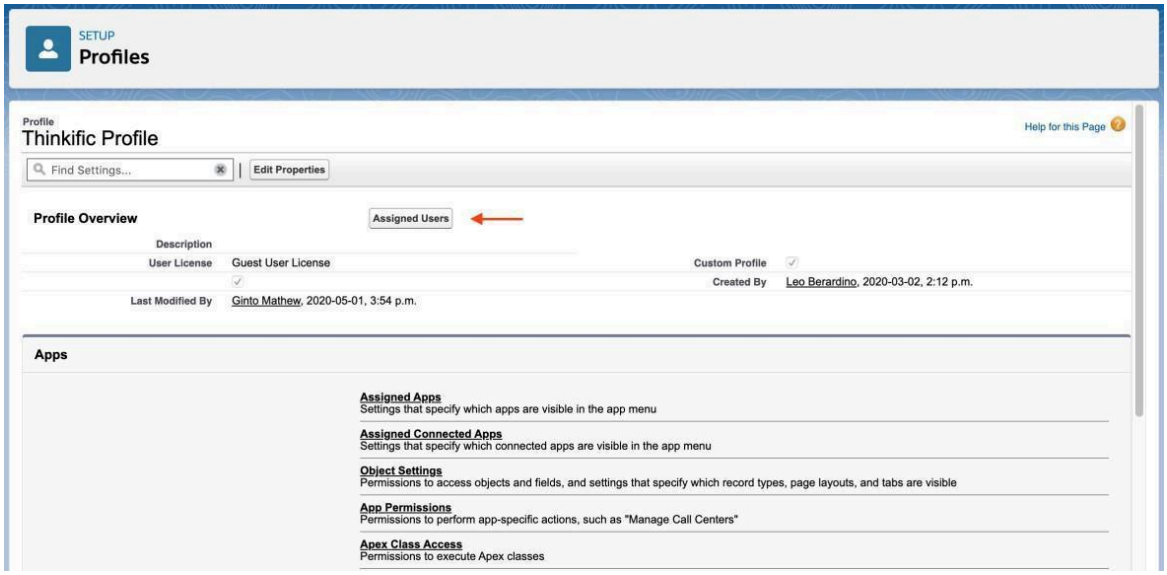
2. On the Sites page locate the **Thinkific Connector site** and click on the **site label**.



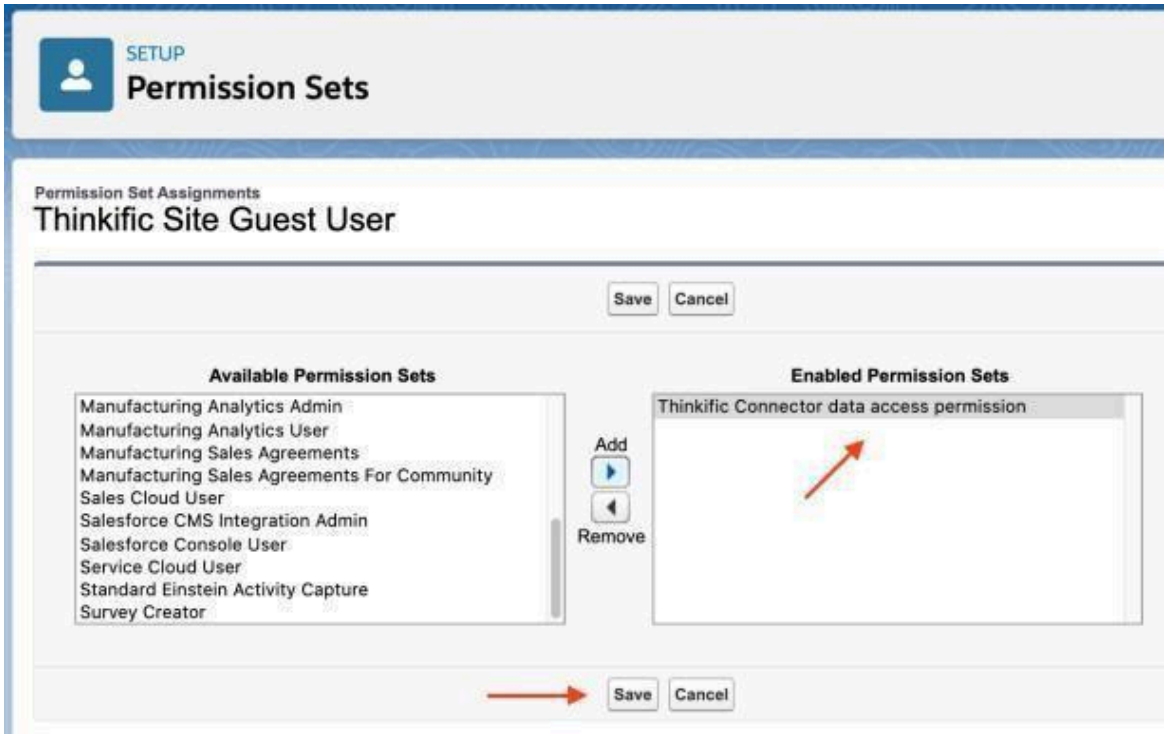
3. On the Thinkific site page click on the **Public Access Settings** button.



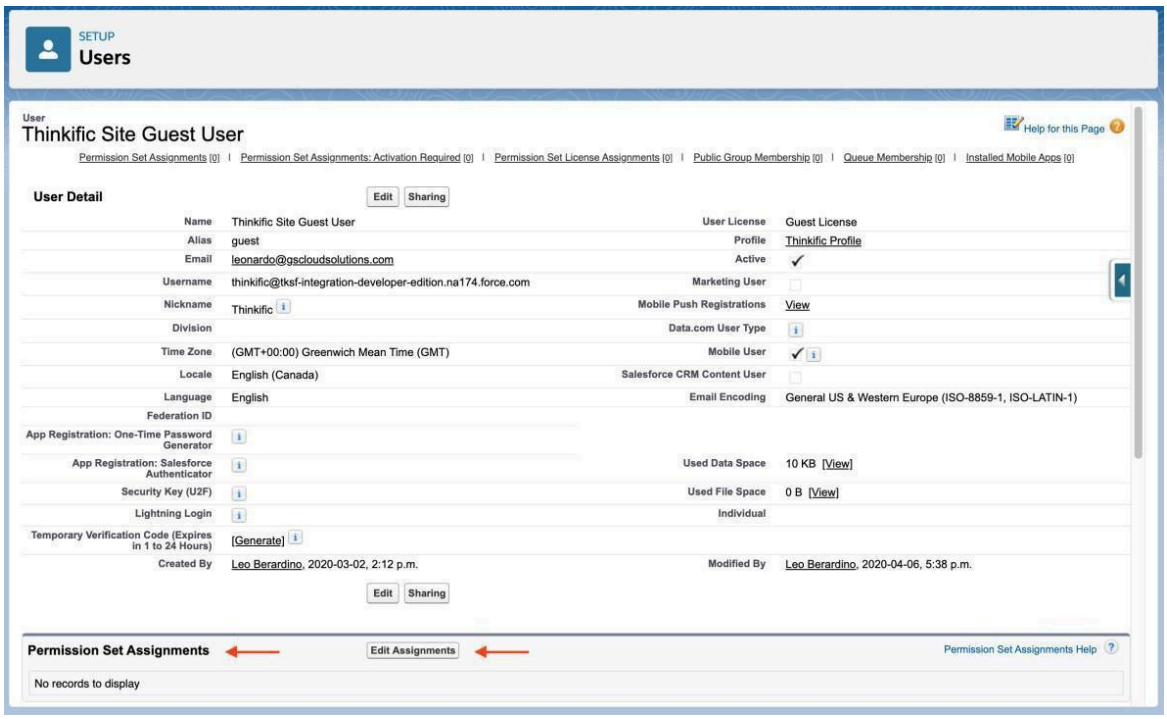
4. In the Thinkific profile page click on **Assigned Users** button.



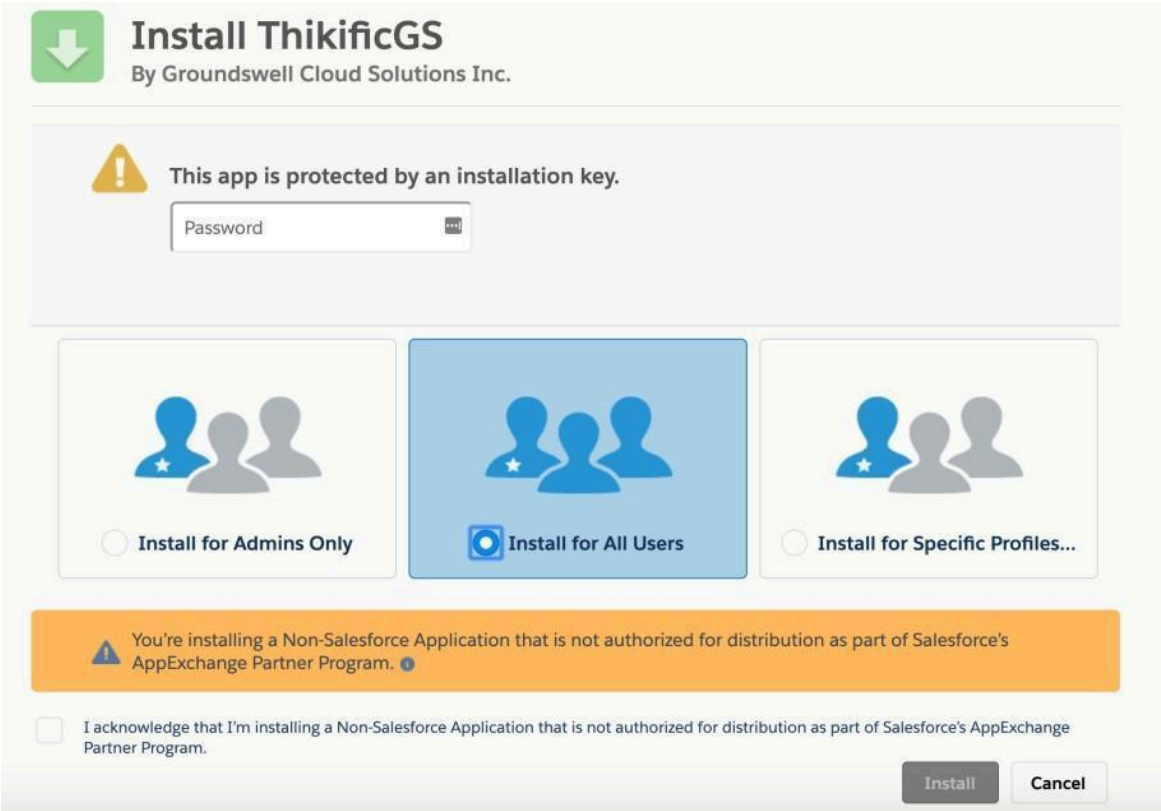
5. Click on the **Site Guest User Full Name** hyperlink.



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



7. 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.

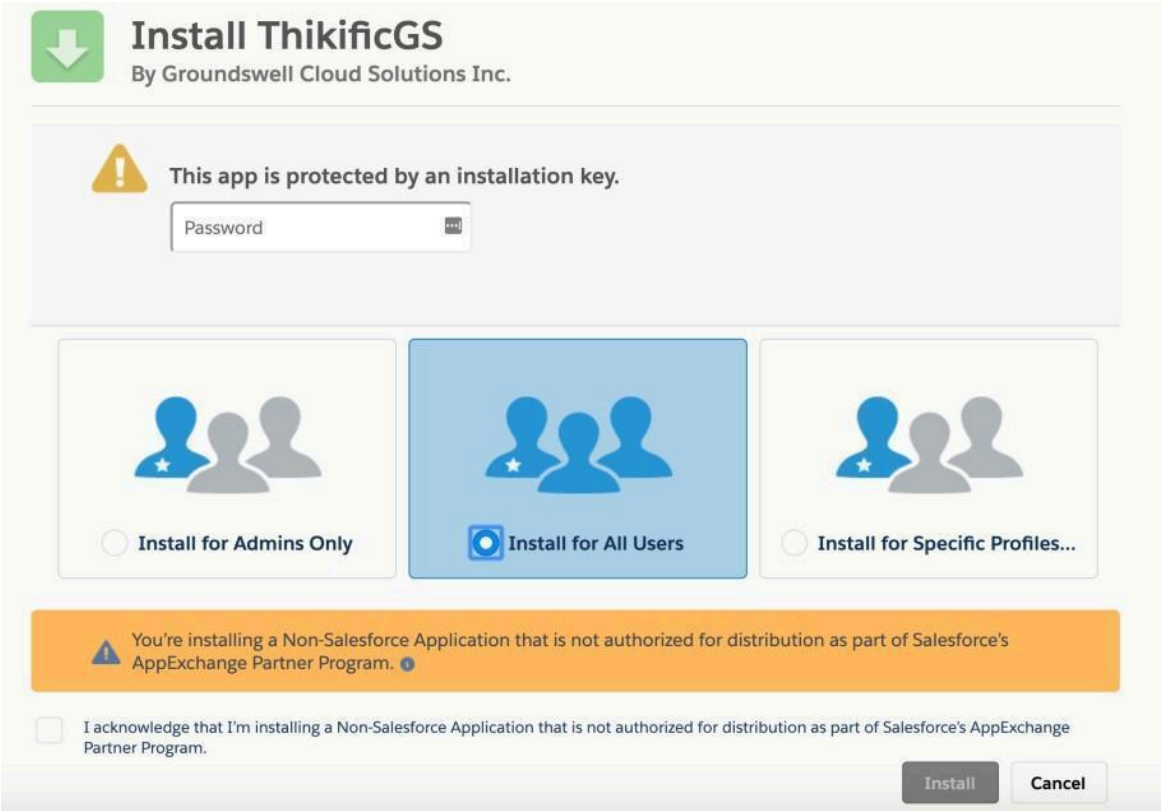
When the update is completed, you will need to assign the new permission set to the site guest user as described in the Setup the Site Permissions section.

Installing/Upgrading Thinkific Connector Package

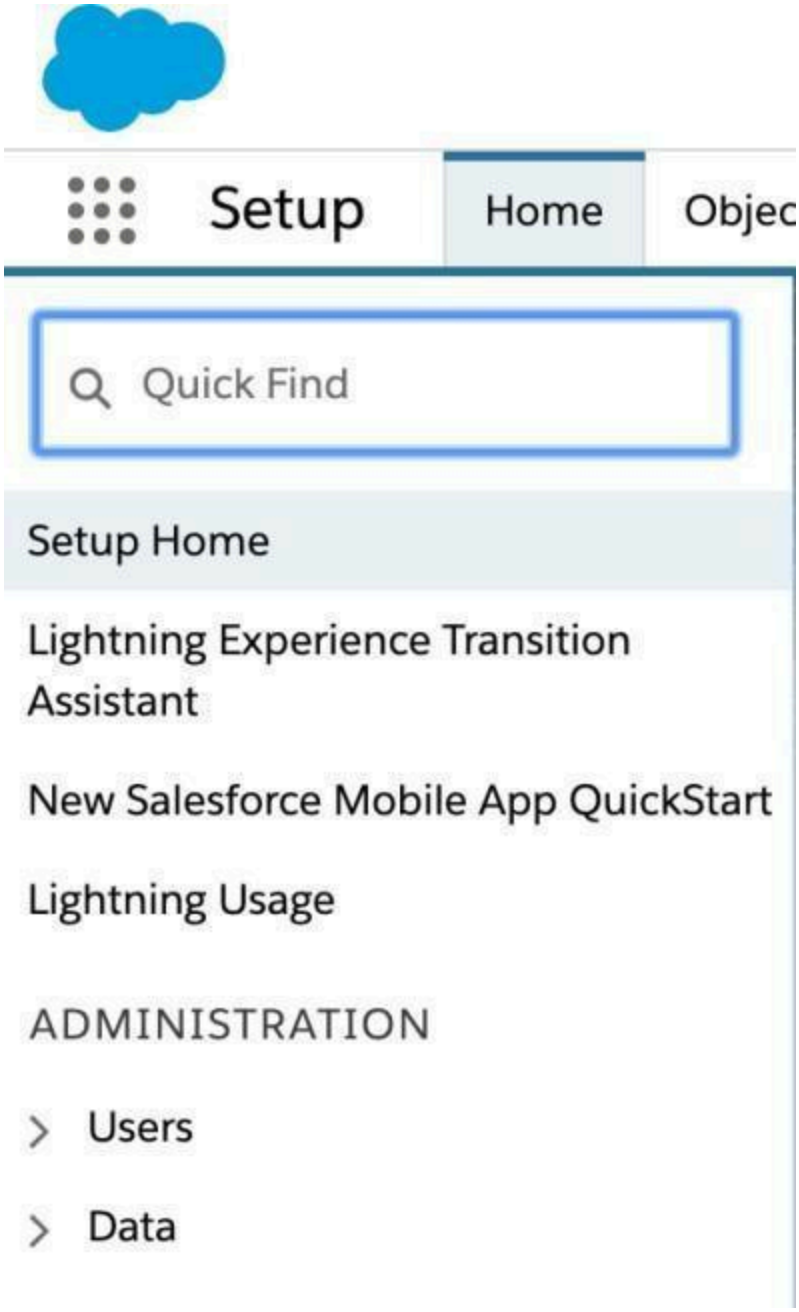
The Thinkific Salesforce Connector is distributed from the Salesforce AppExchange. To install it, access the Thinkific Connector page in AppExchange using the links below (Sandbox installation or Product installation) and follow the instructions.

- Sandbox installation (For beta/testing purposes)
- Production installation (Full package release)

8. Choose the type of installation: Install for **Admins Only**, Install for **All Users** or Install for **Specific Profiles**.
9. Verify that you have read the **acknowledgement message**.
10. 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.
11. If you are ***updating the connector package version***, wait for the update to be completed and go to the Setup the Site Permissions section.



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.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Lightning Experience Transition Assistant
New Salesforce Mobile App QuickStart
Lightning Usage
ADMINISTRATION
Users
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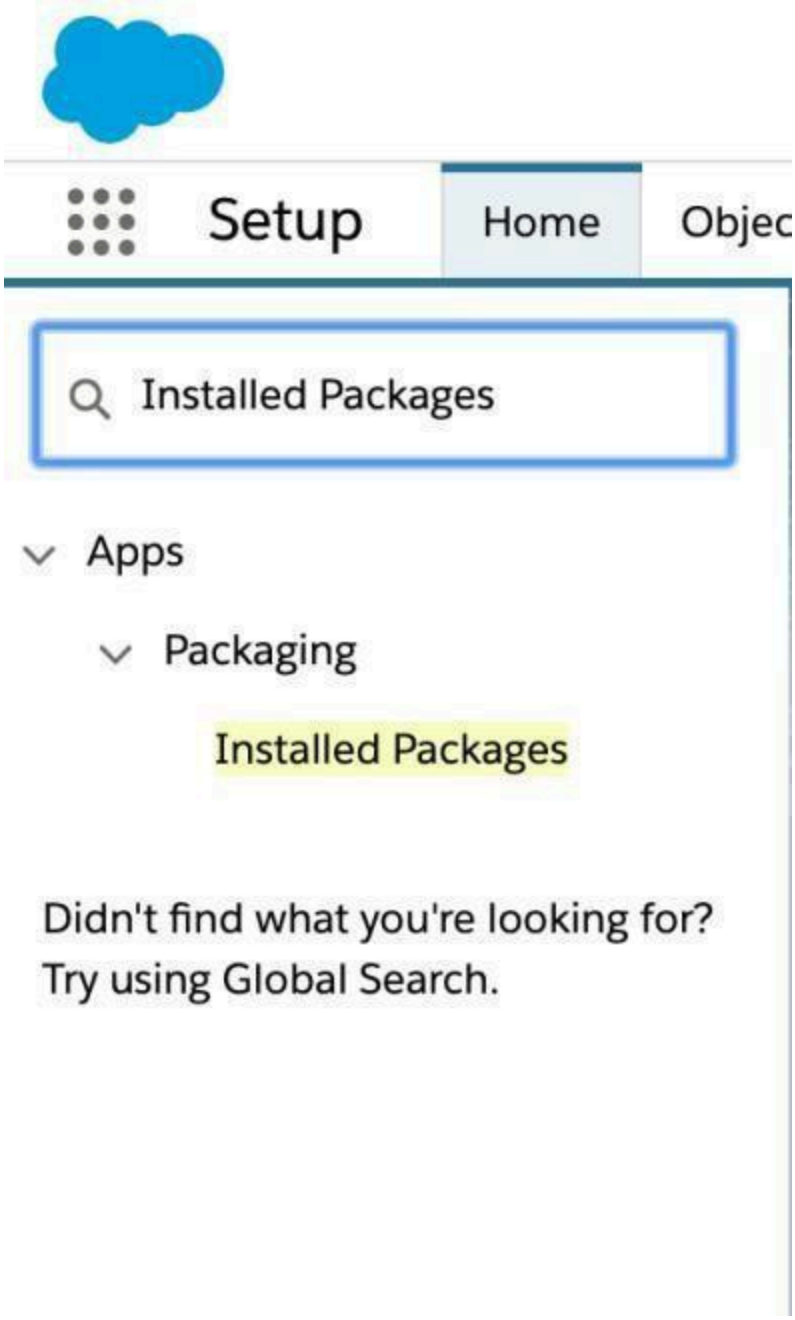
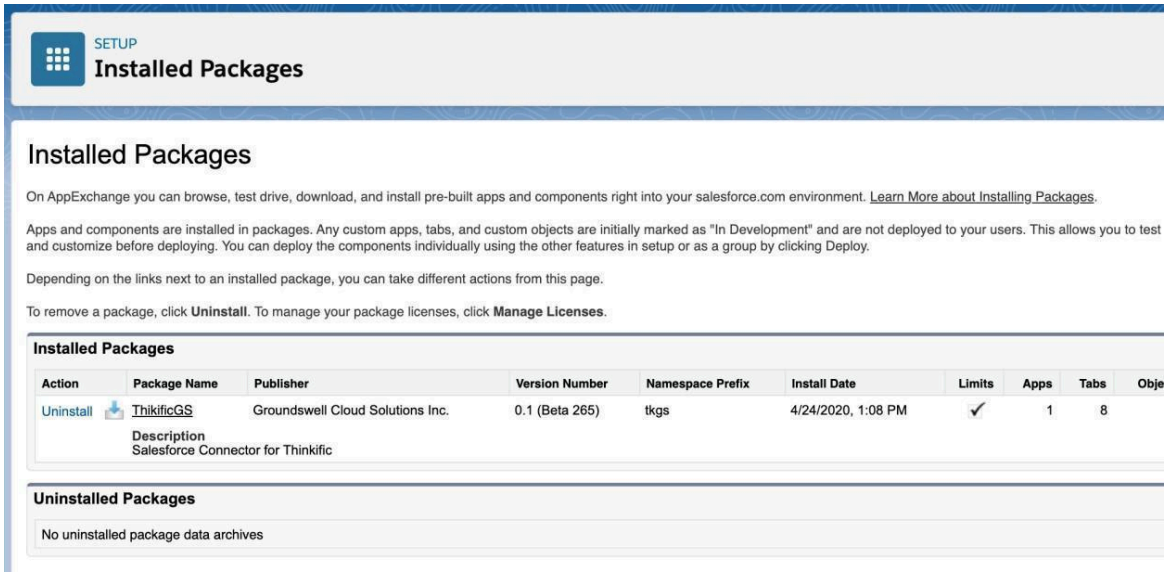


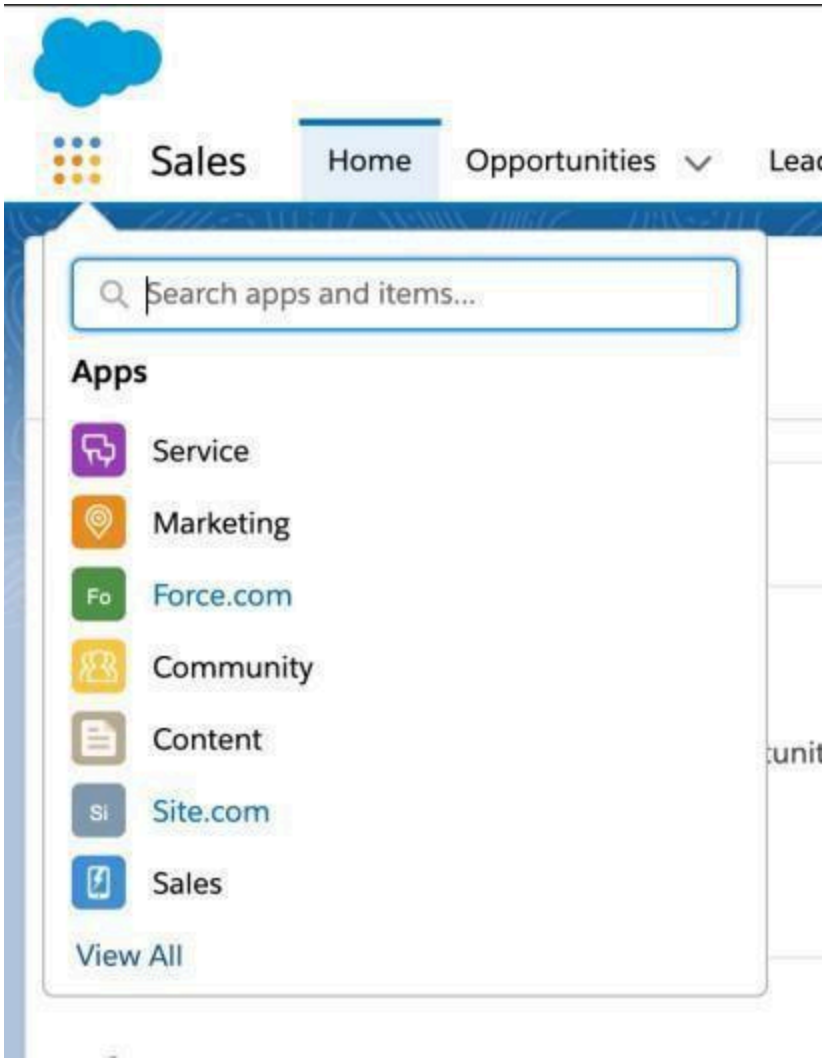
The Installed Packages page:



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**.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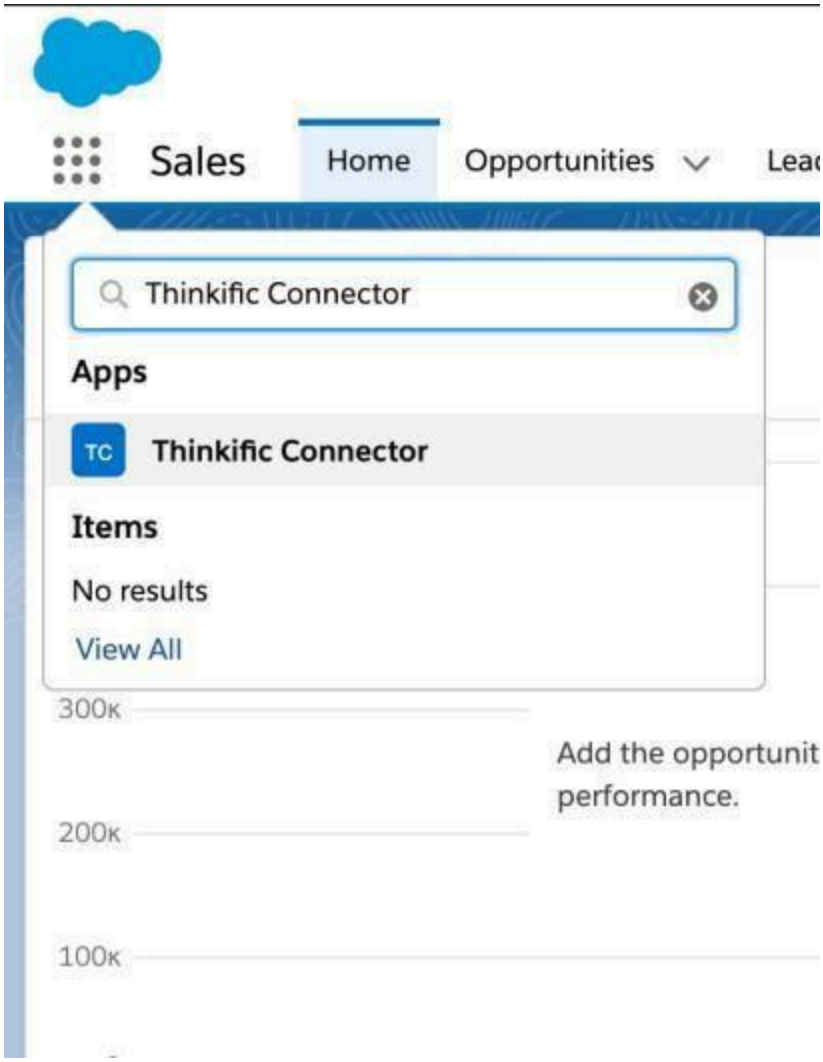


After opening the Thinkific Connector Lightning Application for the first time it will be necessary to configure the Thinkific Connector.

More details about the Thinkific Connector Lightning Application could be found in the Thinkific Connector Lightning Application in Details section.

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.

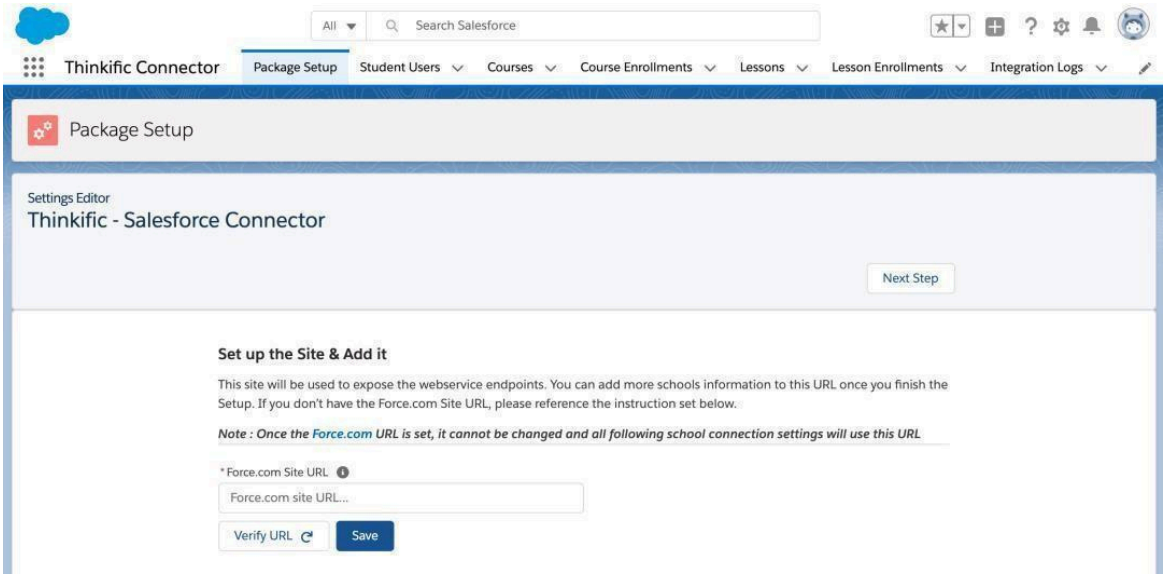
The configuration is made in two steps:

- 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.*

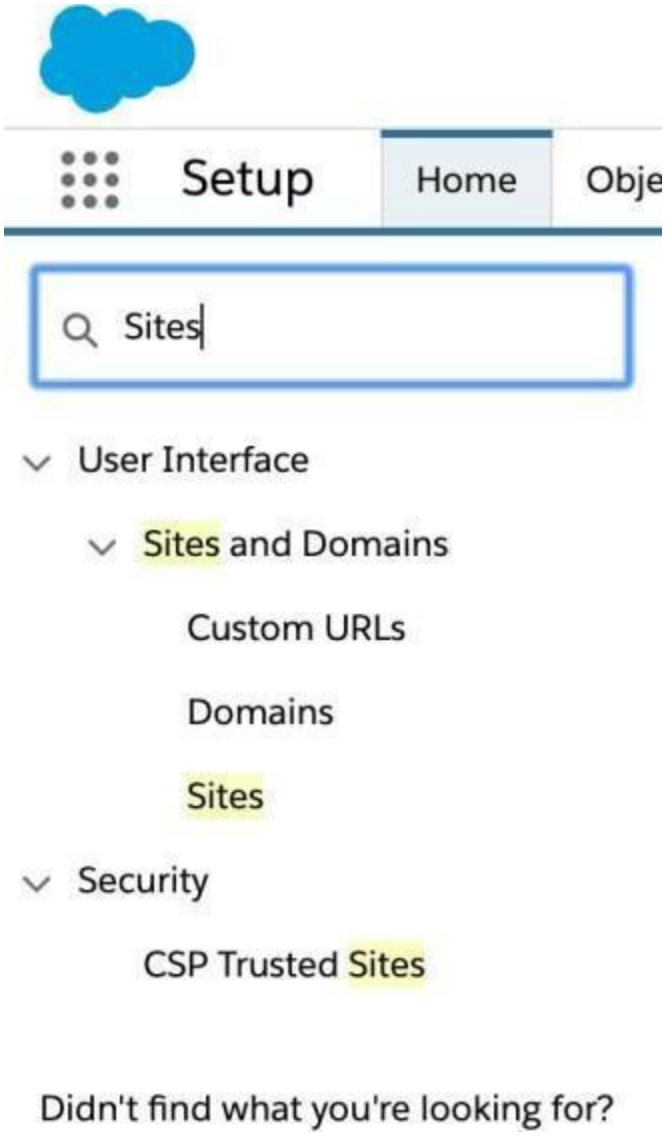
1) Setup the Force.com Site

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.



Create a new Force.com Site

12. From **Salesforce Setup Page** enter **Sites** in the **Quick Find** box, then navigate to **Sites**.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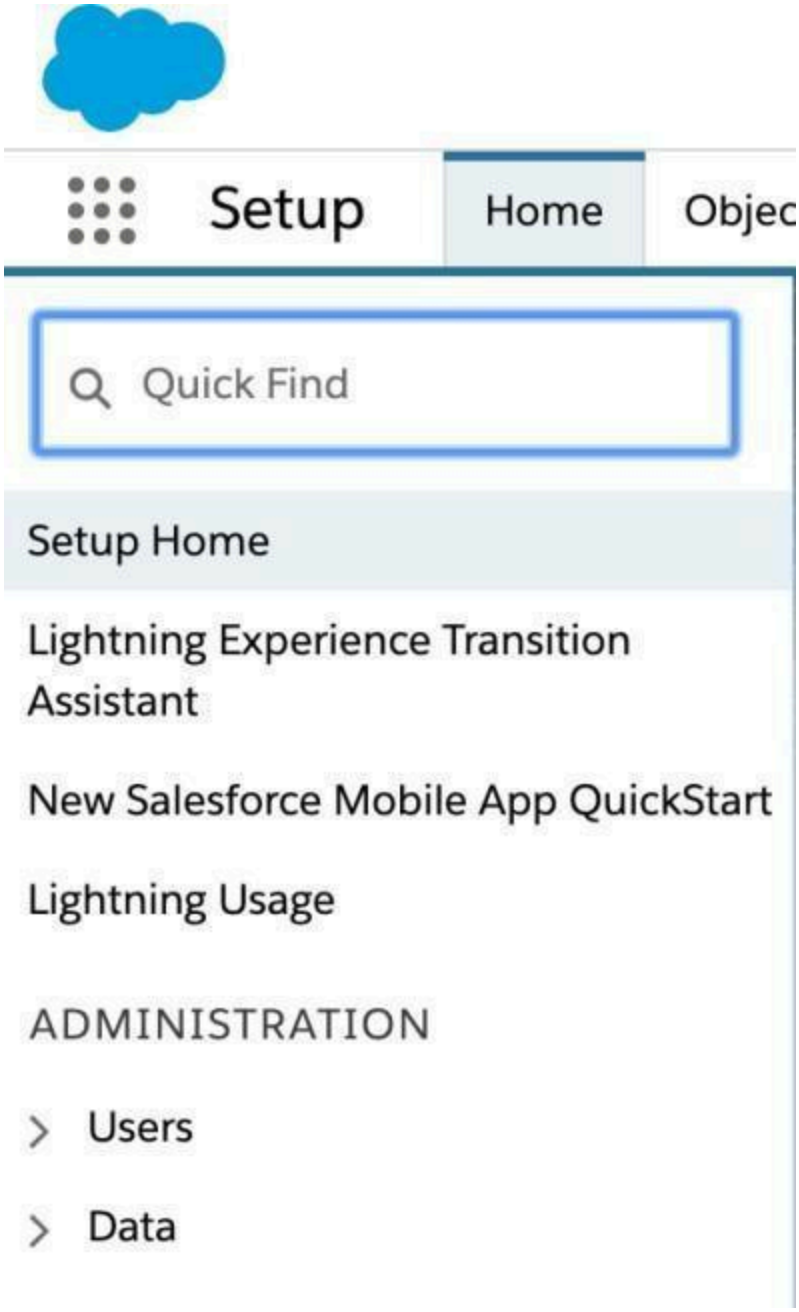
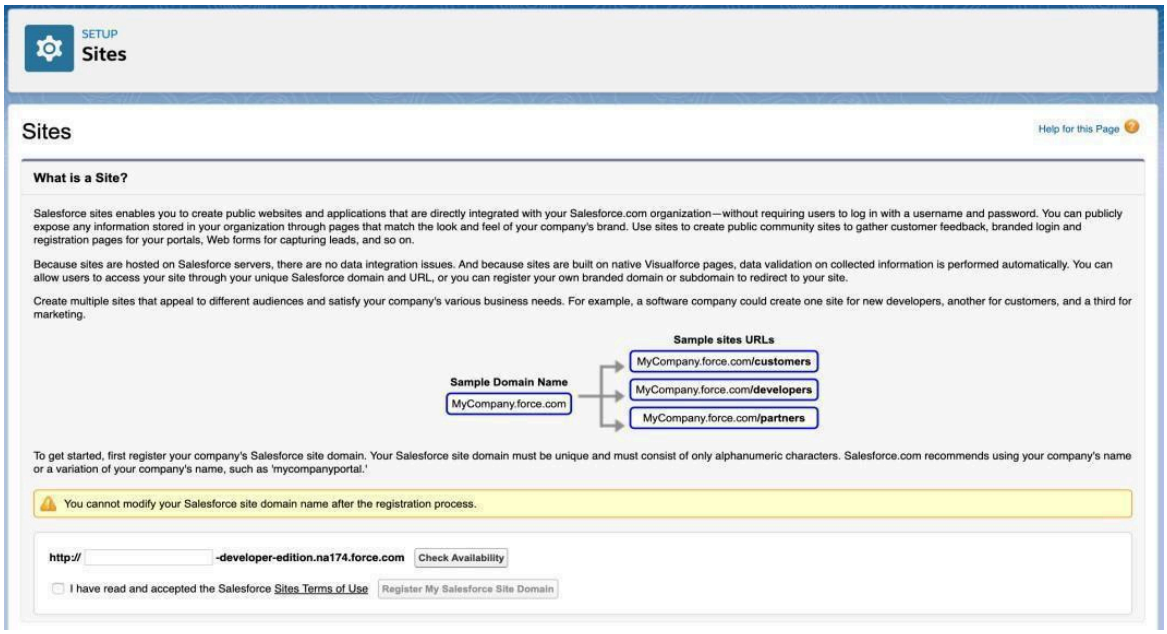
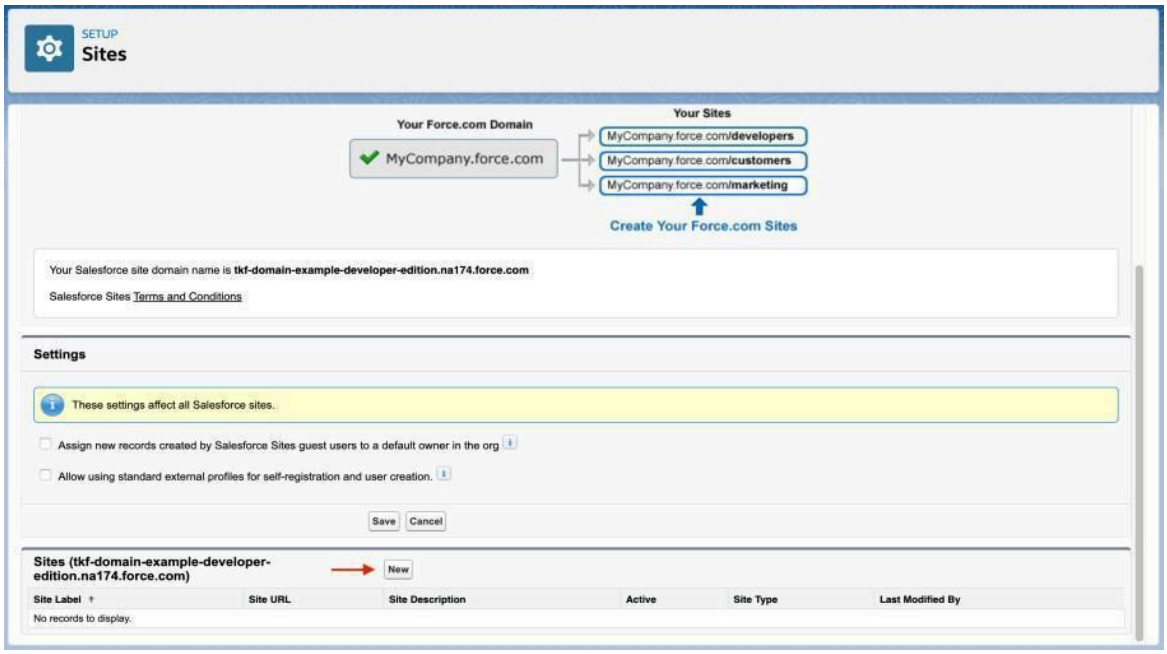
Sites
User Interface
Sites and Domains
Custom URLs
Domains
Sites
Security
CSP Trusted Sites
Didn't find what you're looking for?



13. If you don't have a Site already created, register a custom Salesforce Sites domain for your organization. Input the site domain for your company and click on **Check Availability**. If available, check **Sites Terms of Use** and click the button to register the domain.

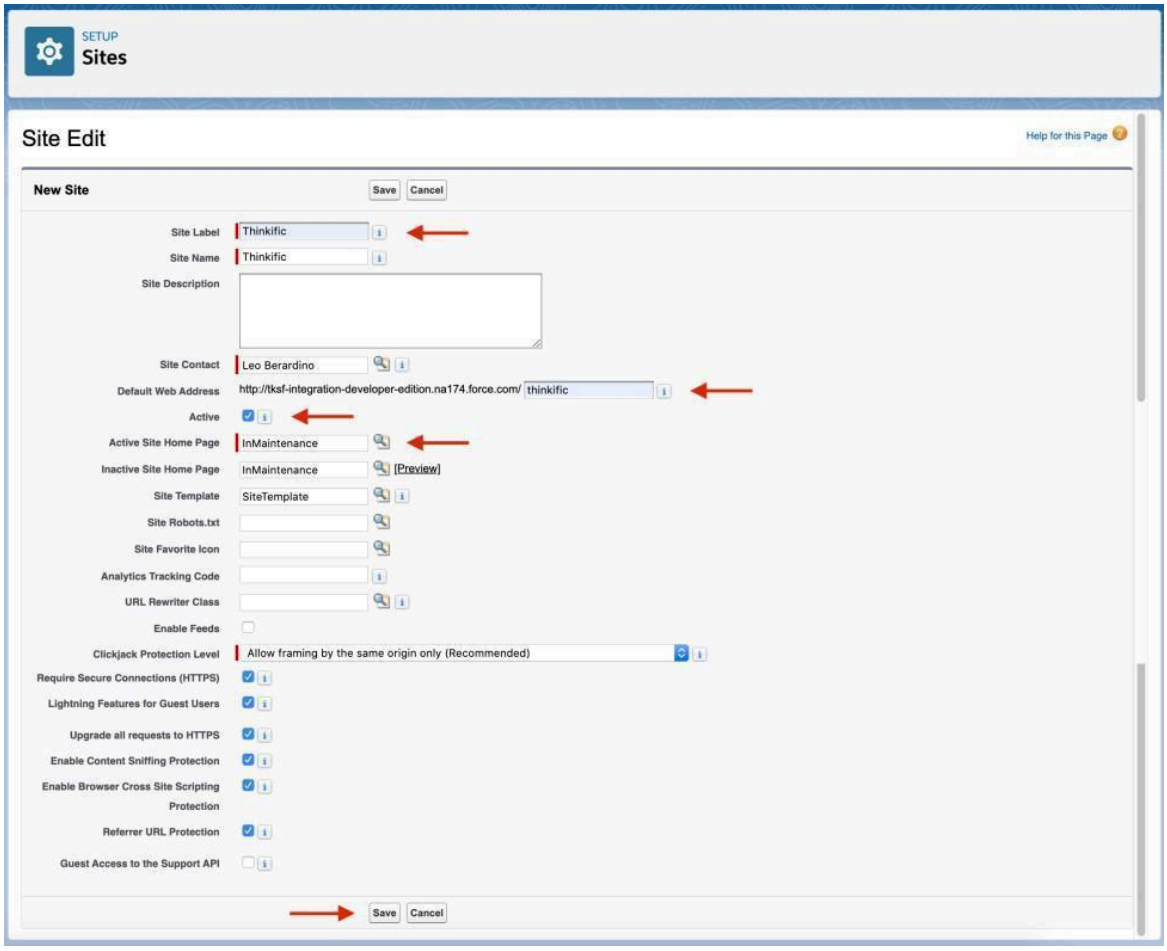


14. Create a new site clicking on the **New** button.



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

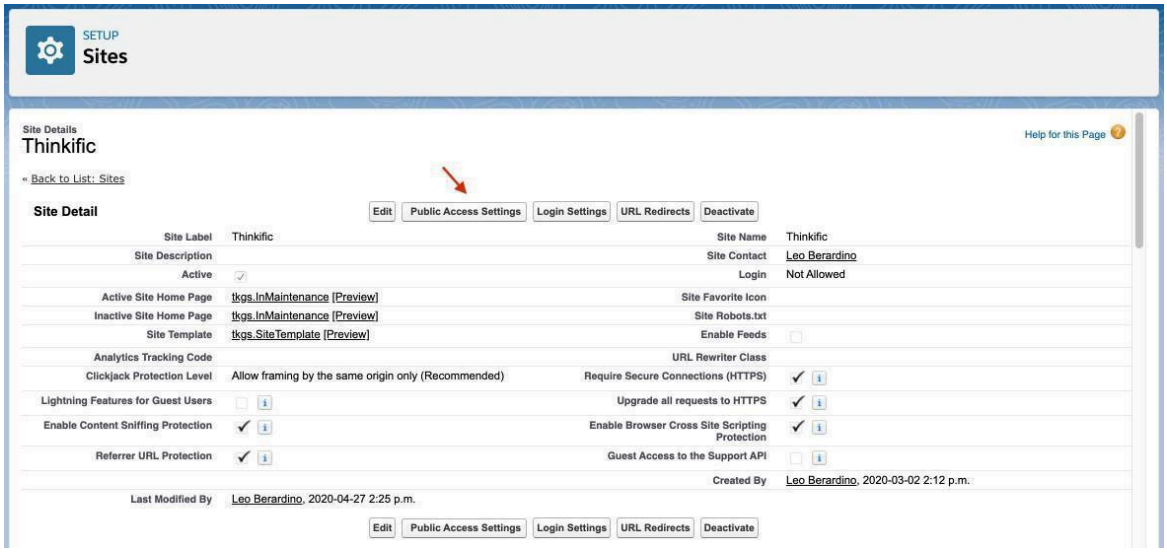
- **Site Label:** Thinkific
- **Default Web Address:** thinkific
- **Active:** Checked
- **Active Site Home Page:** InMaintenance



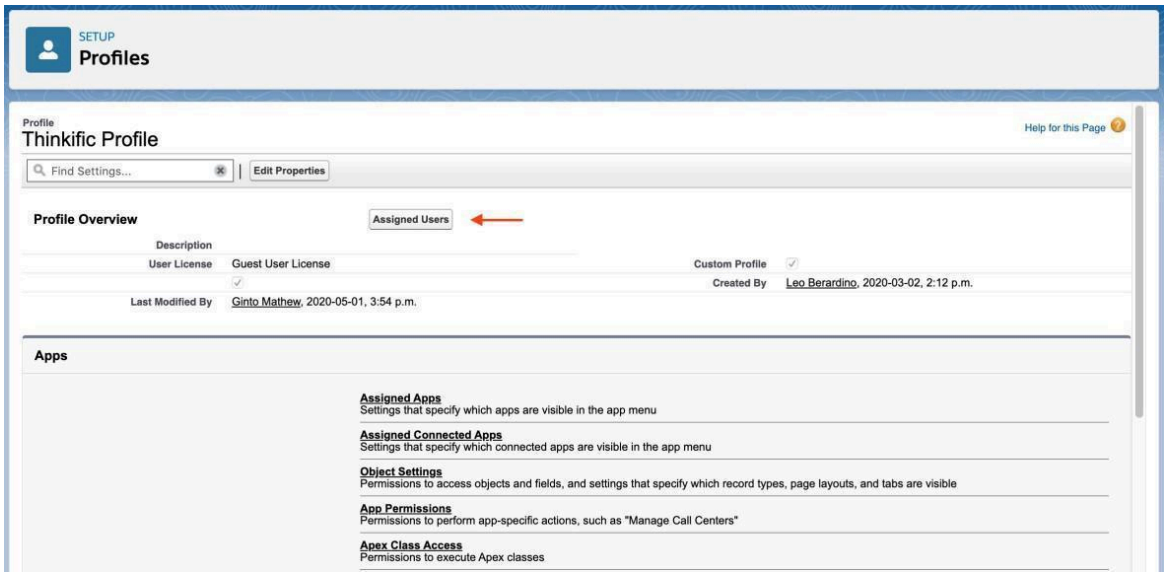
Setup the Site Permissions

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

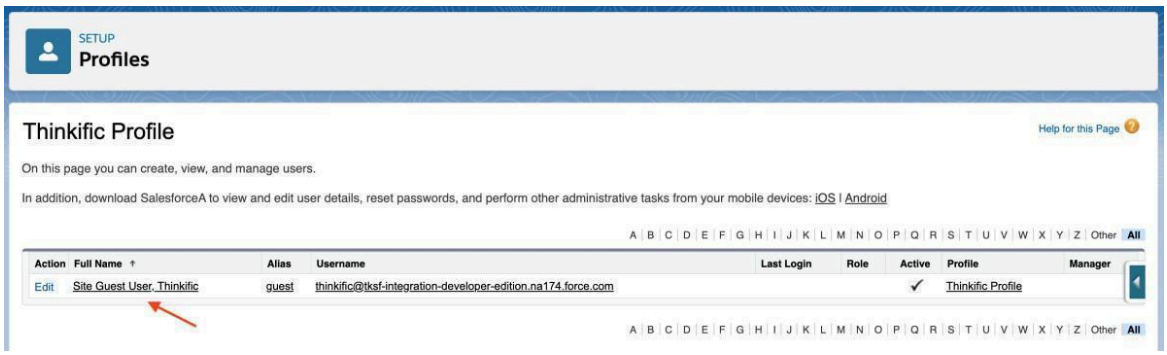
16. After saving the new site, you will be taken to the **Site Details** page. On this page click on the **Public Access Settings** button.



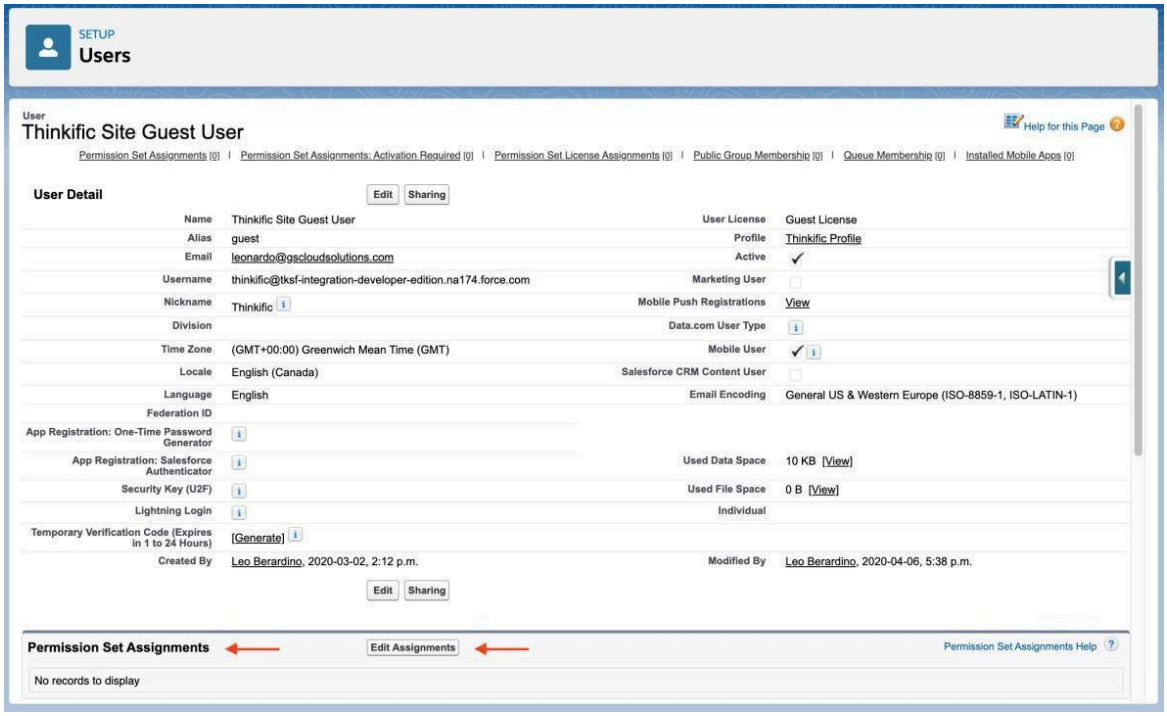
17. In the Thinkific profile page click on **Assigned Users** button.



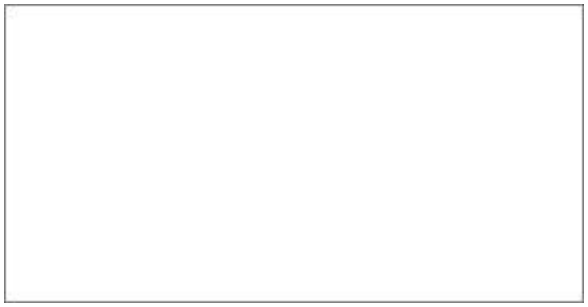
18. Click on the **Site Guest User Full Name** hyperlink.



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



20. 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.

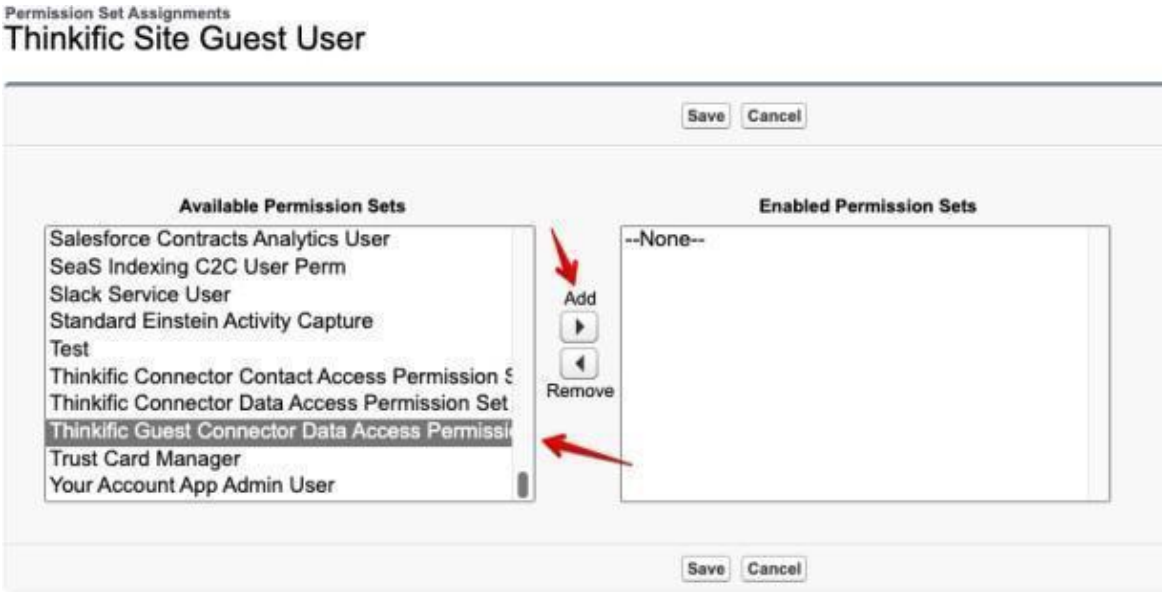


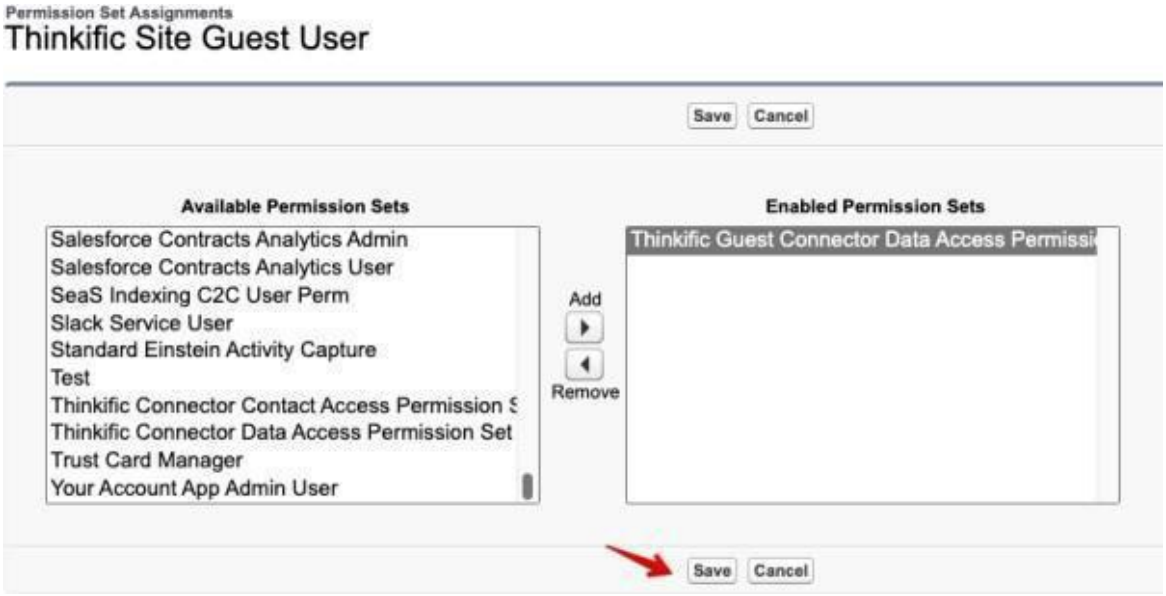
21. The new permission set should be shown on the **Permission Set Assignments** section.

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

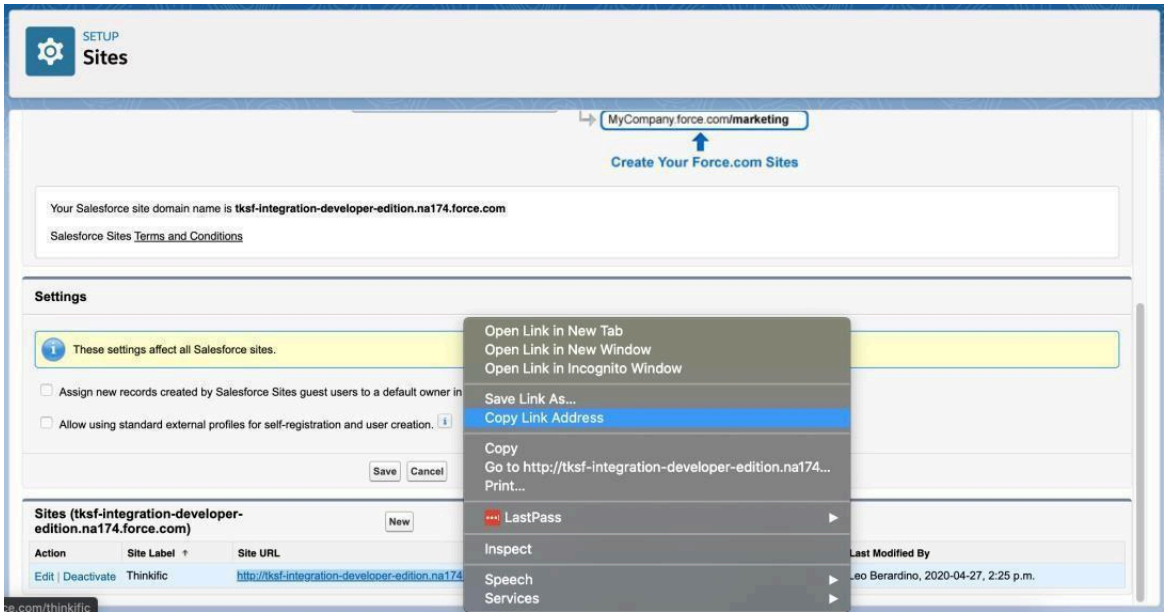
Enable access for your newly created Force.com Site

23. Go back to the **Salesforce Sites** page. Your new Force.com site will be listed on this page.
24. Copy your Force.com site URL by right-clicking the link in the **Site URL** column and clicking **Copy Link Address**.



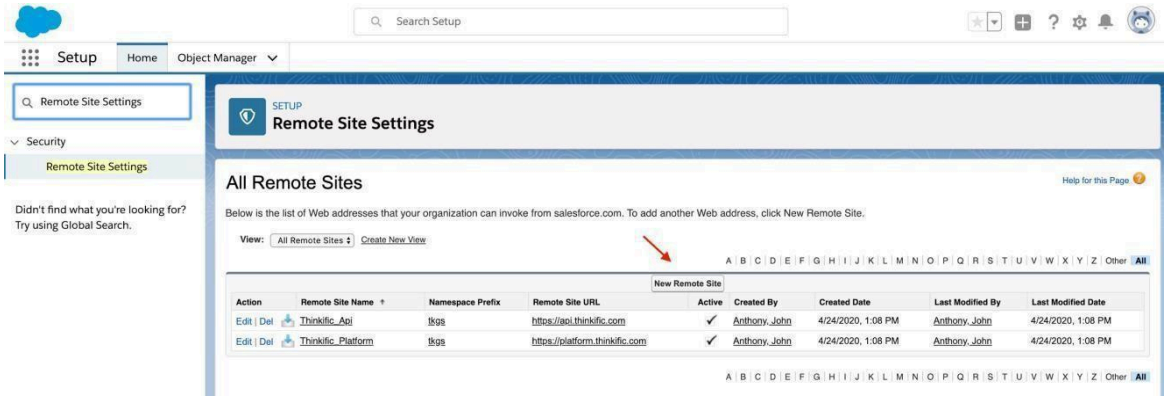


25. On the **Salesforce Setup Quick Find** input box type **Remote Site Settings** and access this page. Click on the **New Remote Site** button.



26. Fill in the remote site configuration:

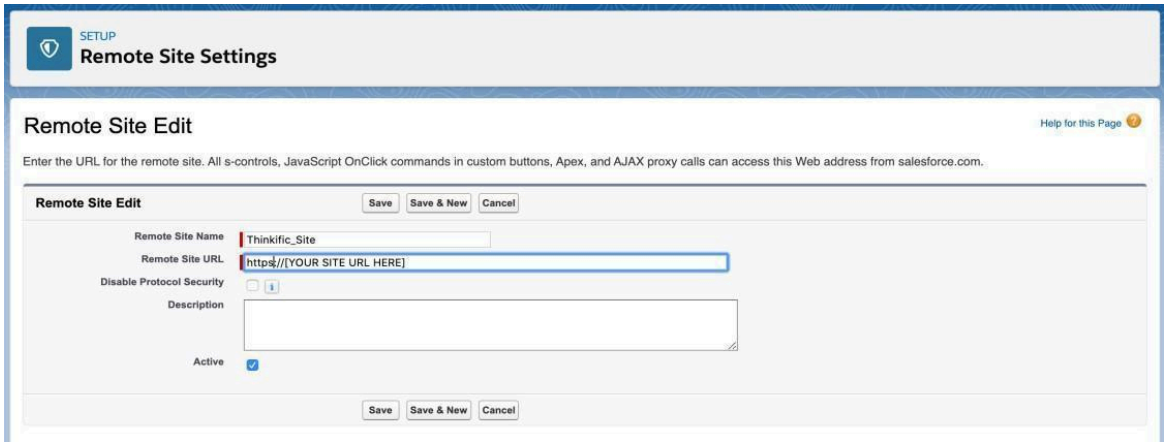
- **Remote Site Name:** Thinkific_Site
- Remote Site URL: Paste your Force.com site URL. **Be sure that the URL protocol is HTTPS instead of HTTP!**
- **Active:** Checked
- Click on the **Save** button.



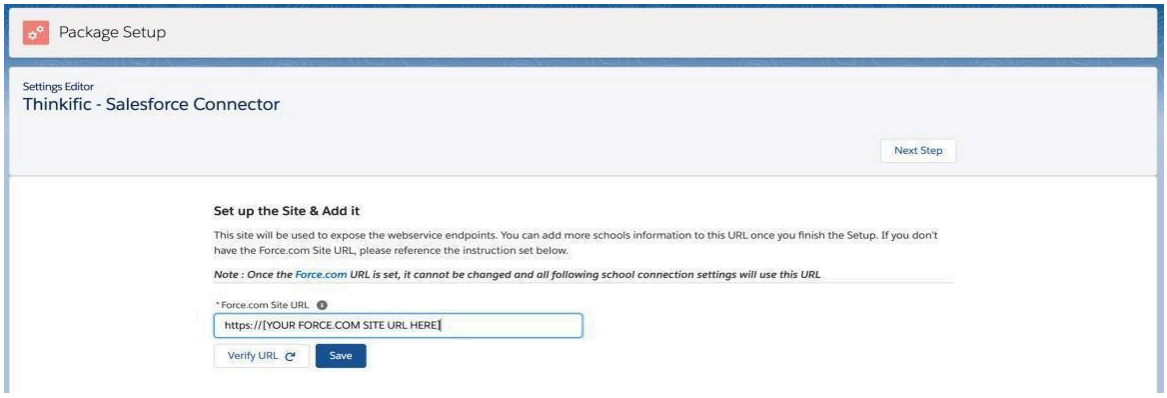
Save and Verify your Force.com Site on the Connector Configuration Page

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

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

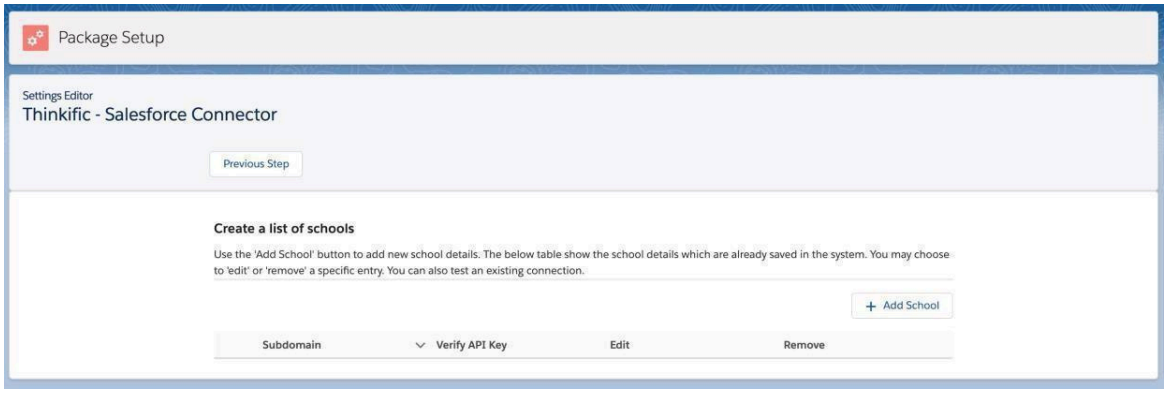


29. Click on the **Verify URL** button and, after the verification, on the **Save** button. If the URL verification fails, review the Force.com Site configuration steps.
30. Click on the **Next Step** button.



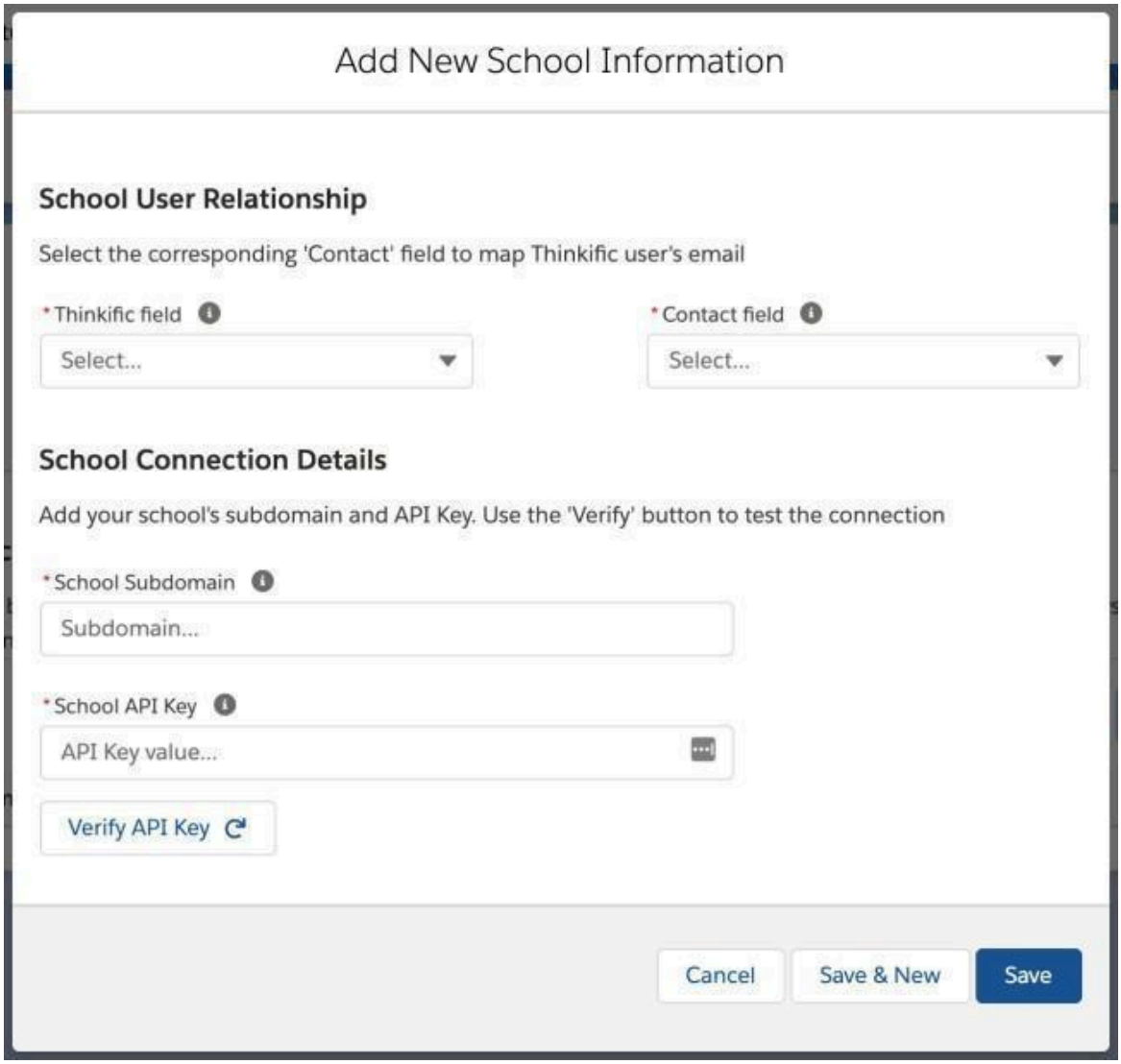
2) Setup the School Connection

Now it's time to connect your Salesforce Org to all your Thinkific Schools. After clicking on **Next Step**, you will see the below page.

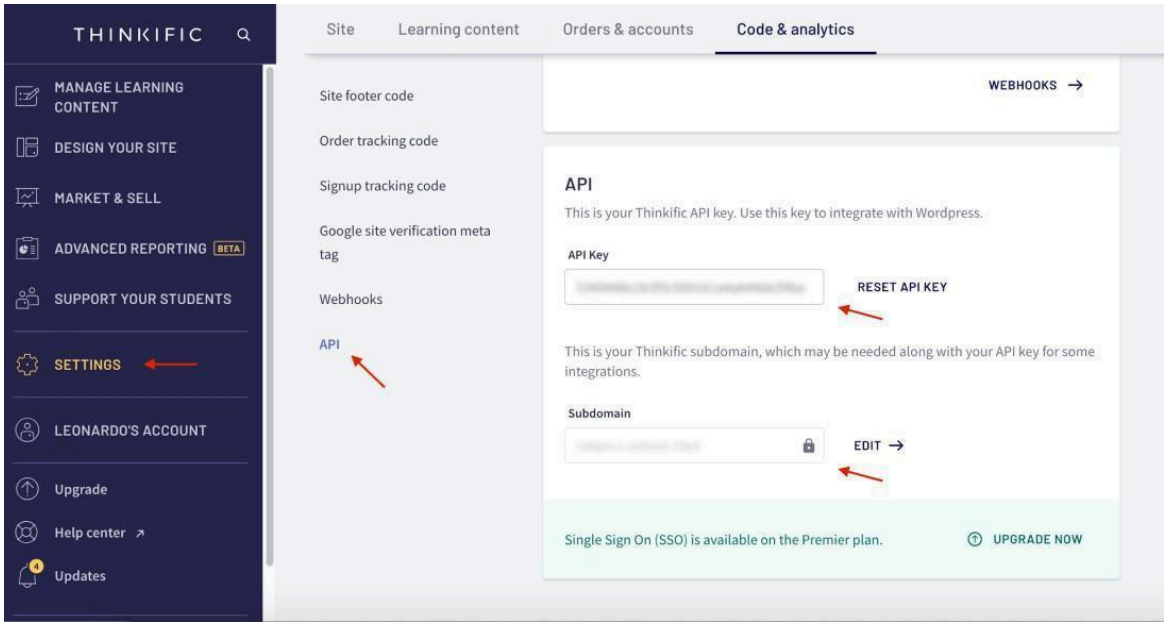


Connecting to a School

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



32. 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. Orphan records could be linked to Contacts in the Student Users tab of the Connector Lightning Application.
33. Fill in **School Connection Details**: The Thinkific School Subdomain and API Key. Go to **SETTINGS > Code & Analytics > API** in the school manager page.



34. Click on **Verify API Key** button.
35. Click on **Save** button.
36. Repeat those steps for all schools.

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

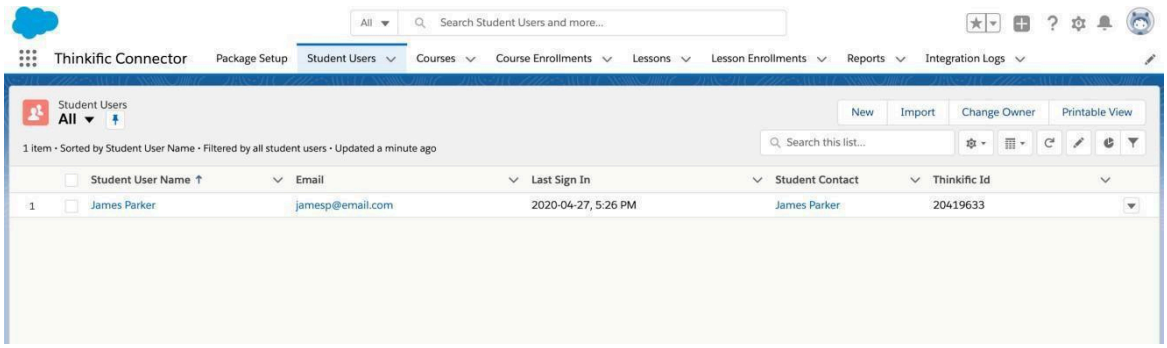
Thinkific Connector Lightning Application in Details

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.

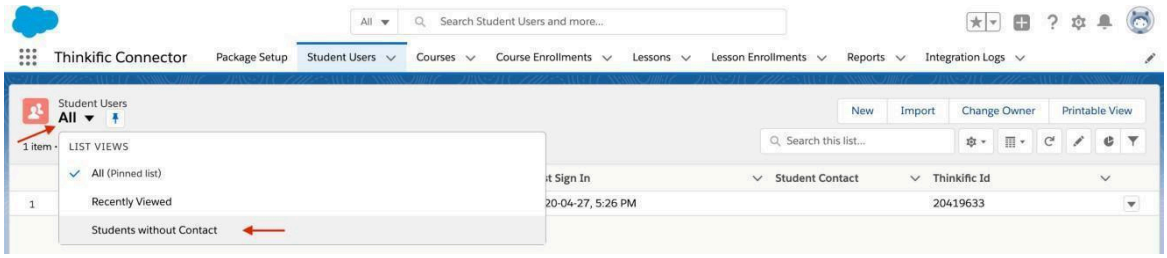


Linking orphan Student Users with Salesforce Contacts

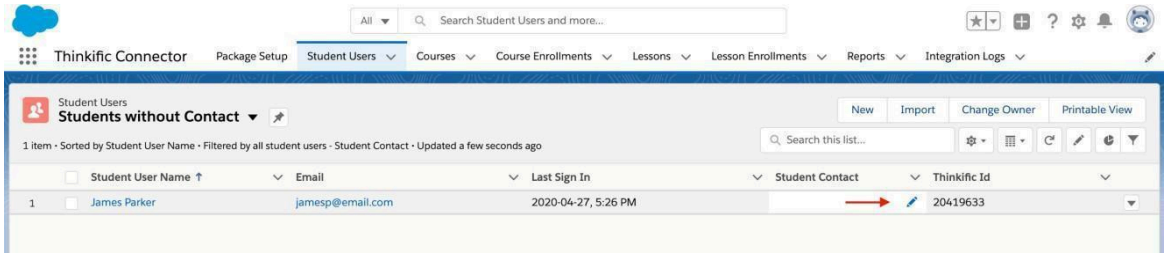
In this tab is also possible to link orphan Student User with Salesforce Contacts.

To link a Student User with a Contact follow instructions:

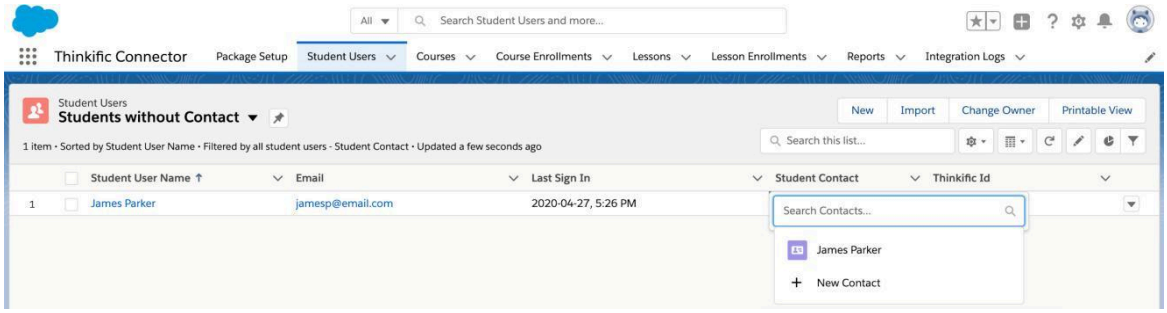
37. Select the **Students without Contact** list view.



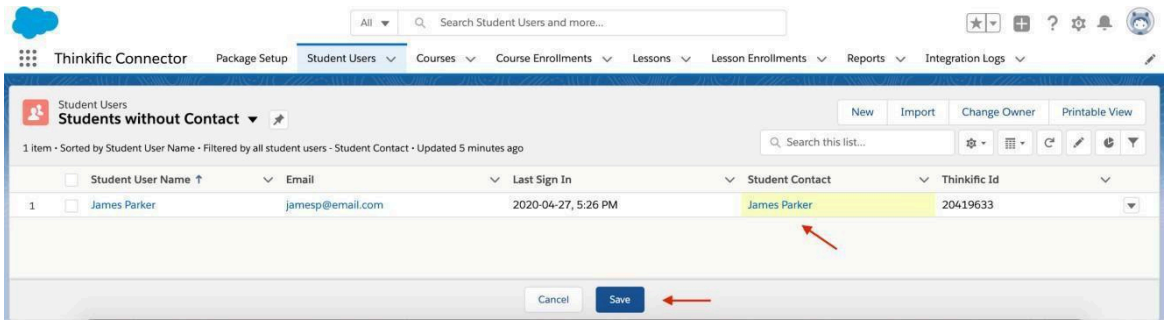
38. Click on the Student Contact edit button.



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



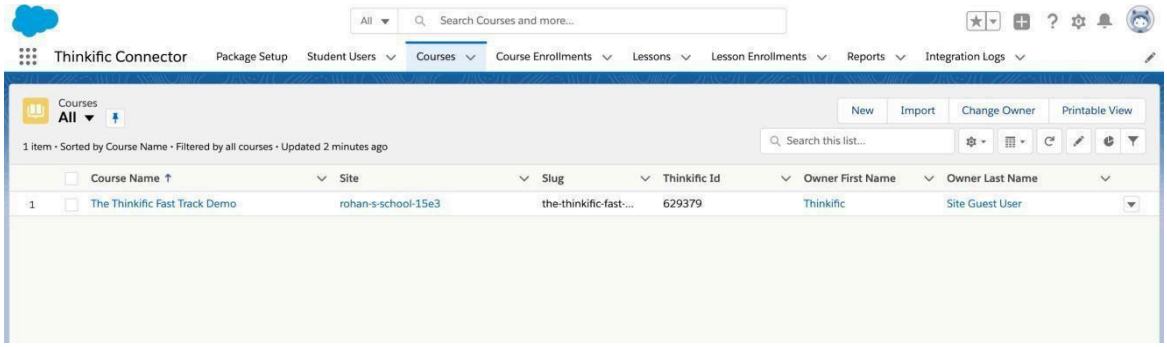
40. Save the Student User record.



Courses Tab

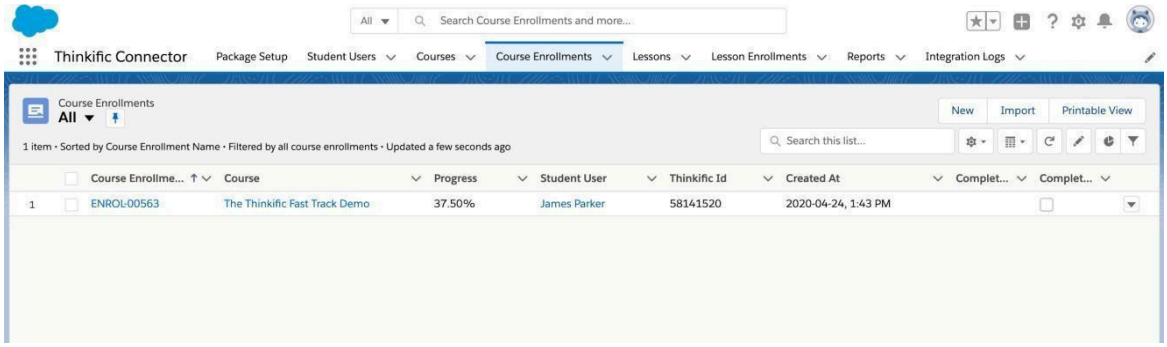
Shows the connected Schools courses.

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.



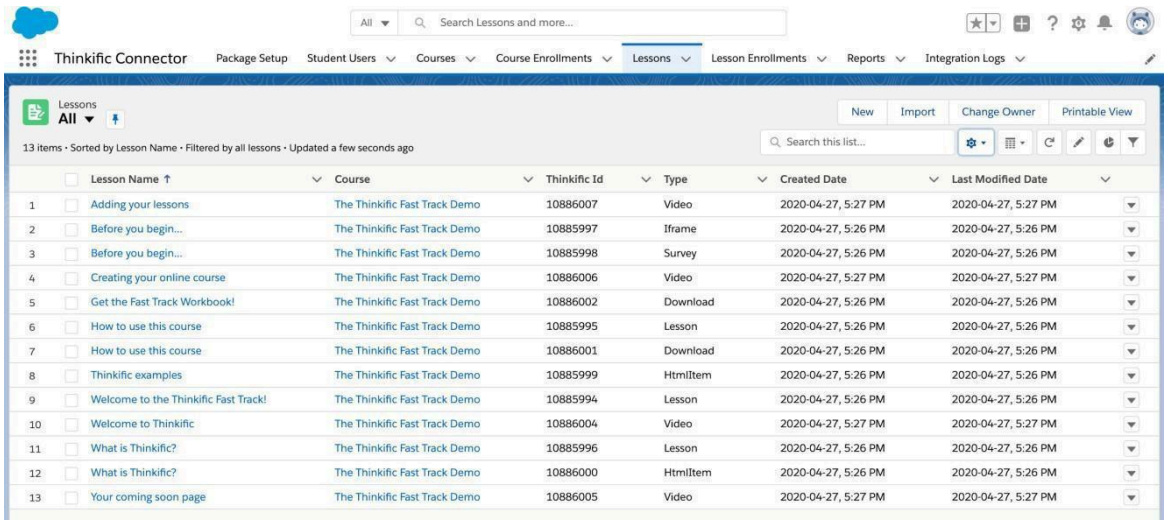
Course Enrollment Tab

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



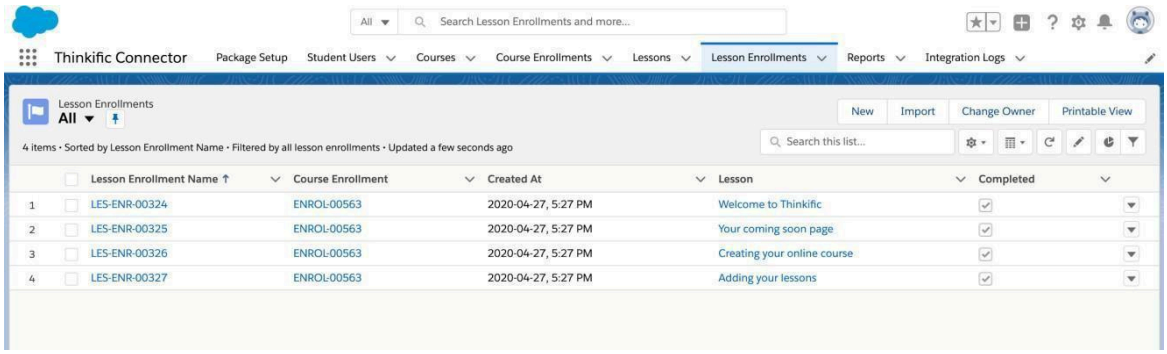
Lessons Tab

Shows the Course Lessons and their type.



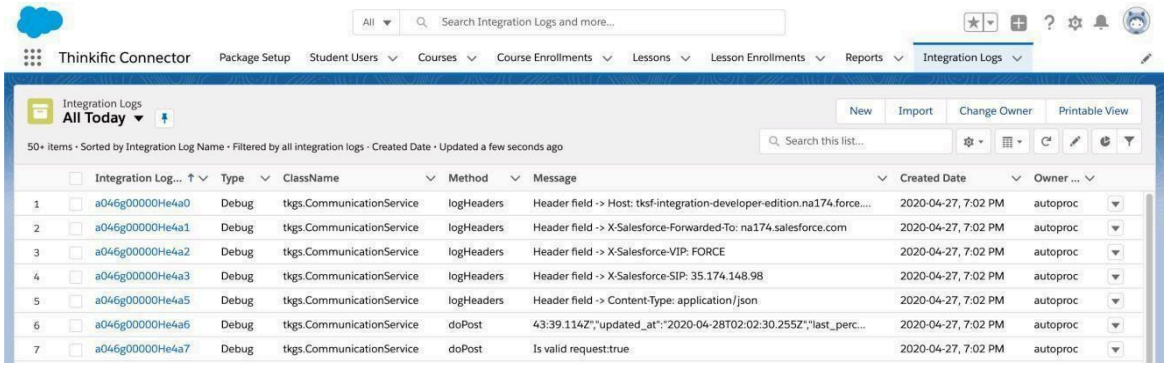
Lessons Enrollment Tab

Shows the Lessons completed by the Student Users.



Integration Logs Tab

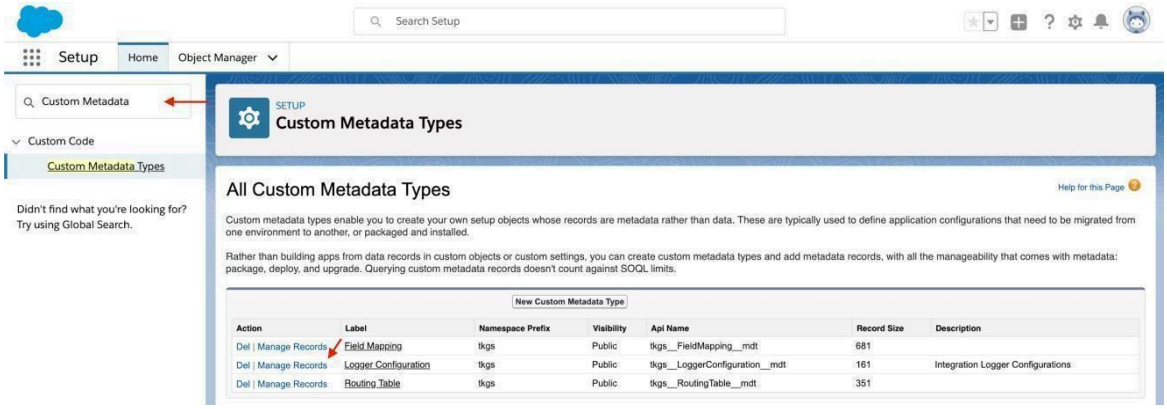
Shows the integration logs. The logs are captured only if the logger configuration is enabled.



Enabling / Disabling Integration Logs

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

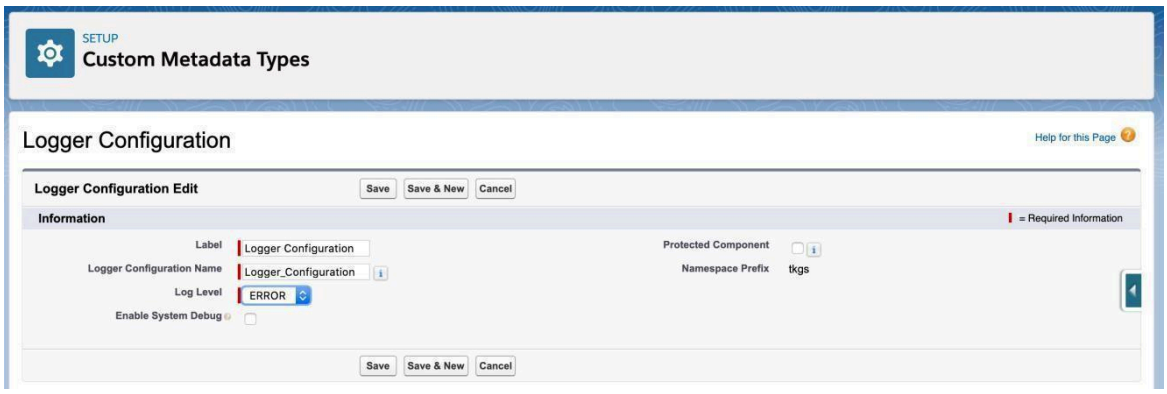
41. From the Salesforce Setup page type **Custom Metadata** in the Quick Find input box and open the **Custom Metadata Types** page. Click on Logger Configuration **Manage Records** hyperlink.



42. Click on the **Logger Configuration Edit** hyperlink.

43. 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.

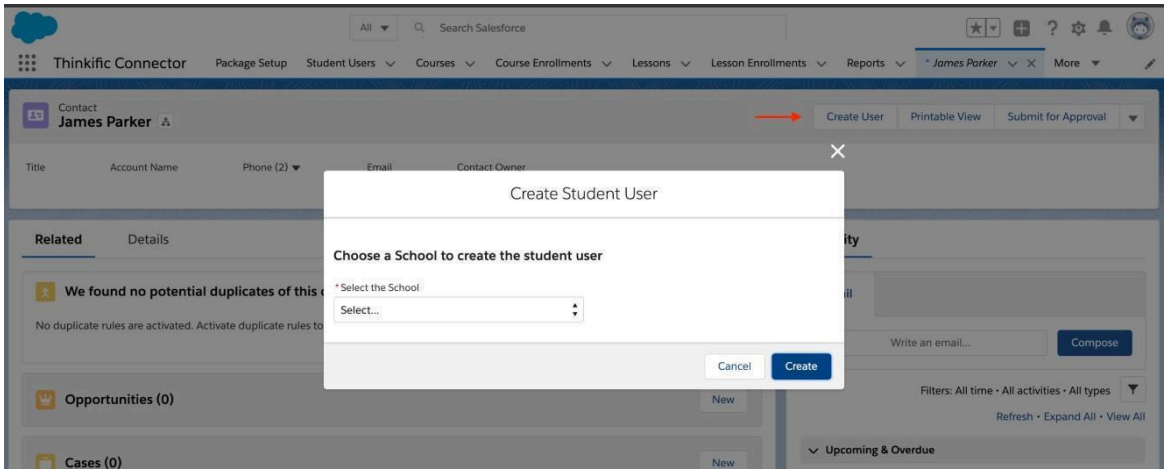


44. Save the Logger Configuration clicking on the **Save** button.

Contact Quick Action Button to Create Student User

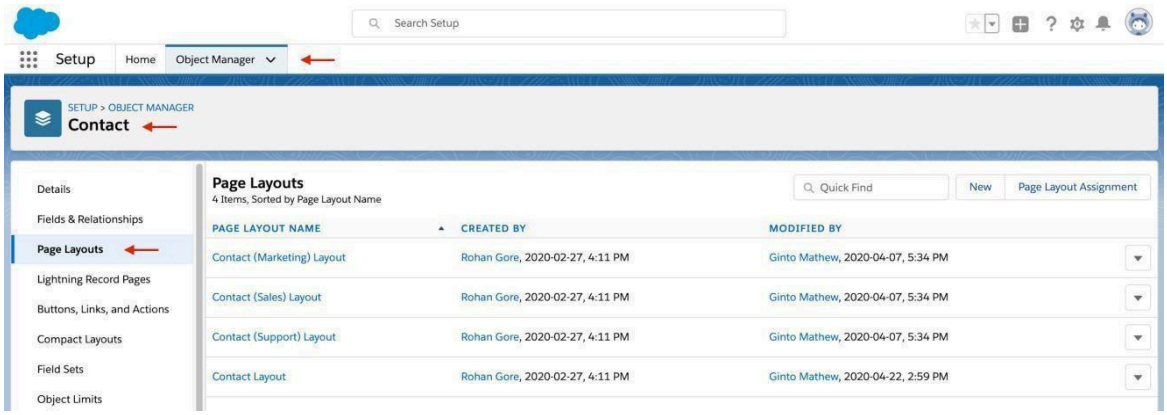
The Contact Quick Action Button allows the Salesforce users to create new Student Users in the connected Schools in Thinkific directly from the Salesforce Org.

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.

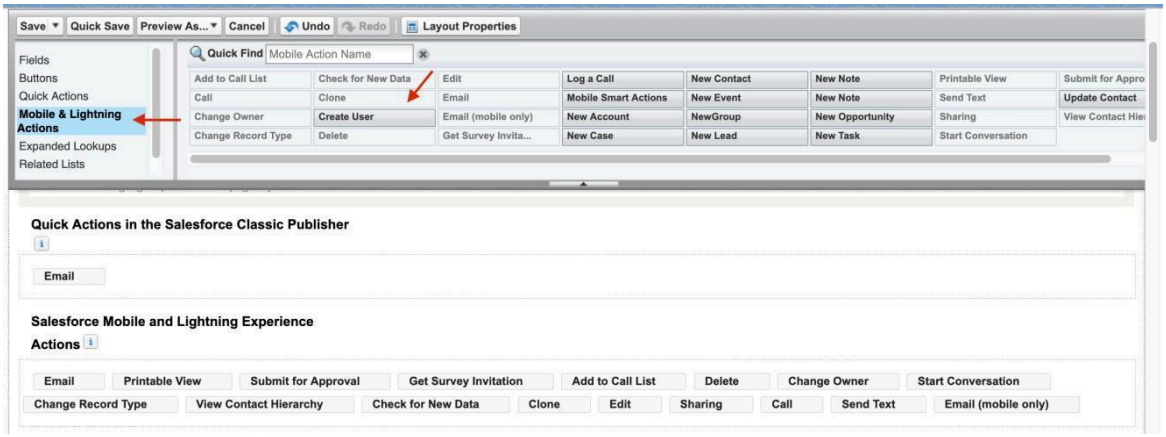


Adding the Quick Action Button on Contact Record page

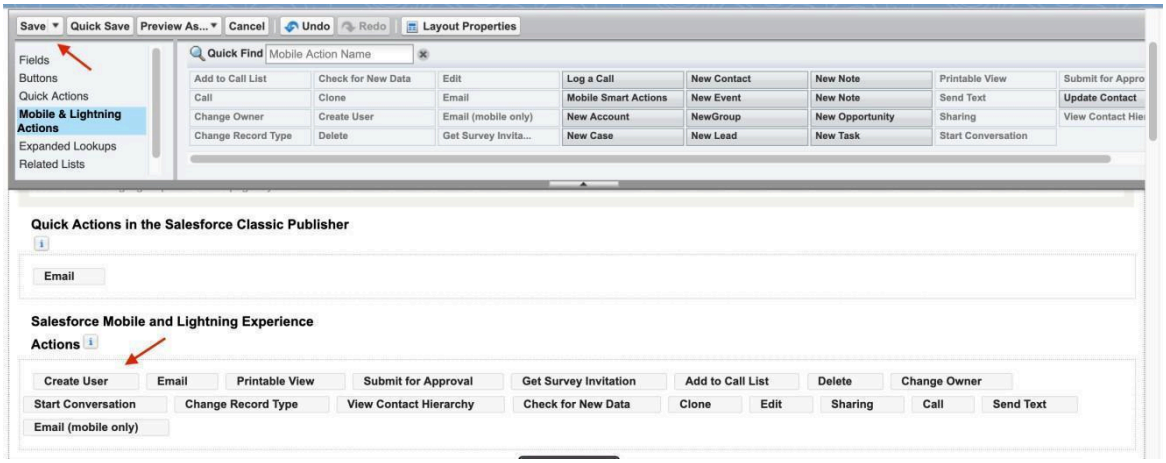
45. In the Salesforce Setup click on **Object Manager Tab**, click on the **Contact** object and after opening the Contact configuration page click on **Page Layouts**.



46. Choose the layout to add the Quick Action and edit it.
47. Click on **Mobile & Lightning Actions**.



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



49. Click on the **Save** button.
50. 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.

Default Reports Types

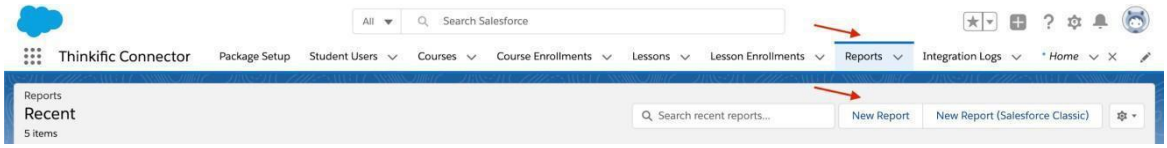
The Thinkific Connector package comes with 13 report types:

- 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

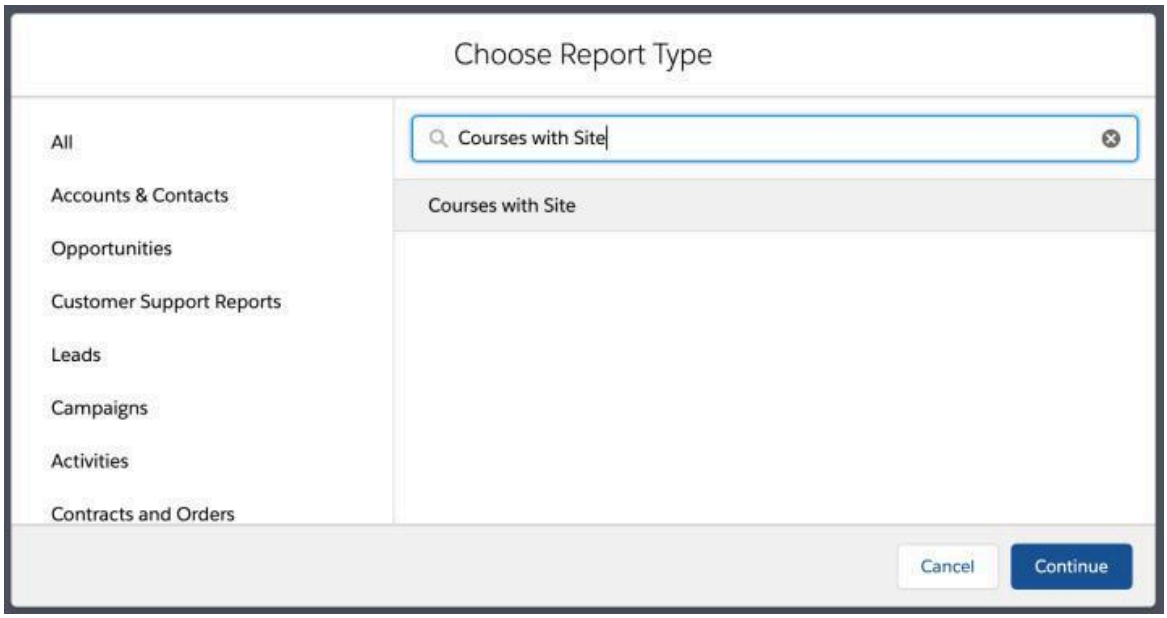
Creating a Report

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

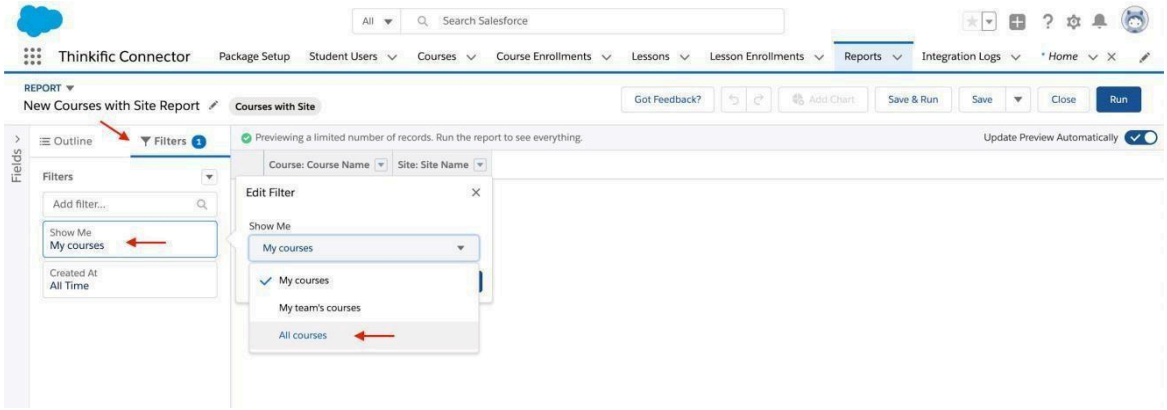
51. Go to the Thinkific Connector Lightning Application and click on the **Reports** tab then click on **New Report** button.



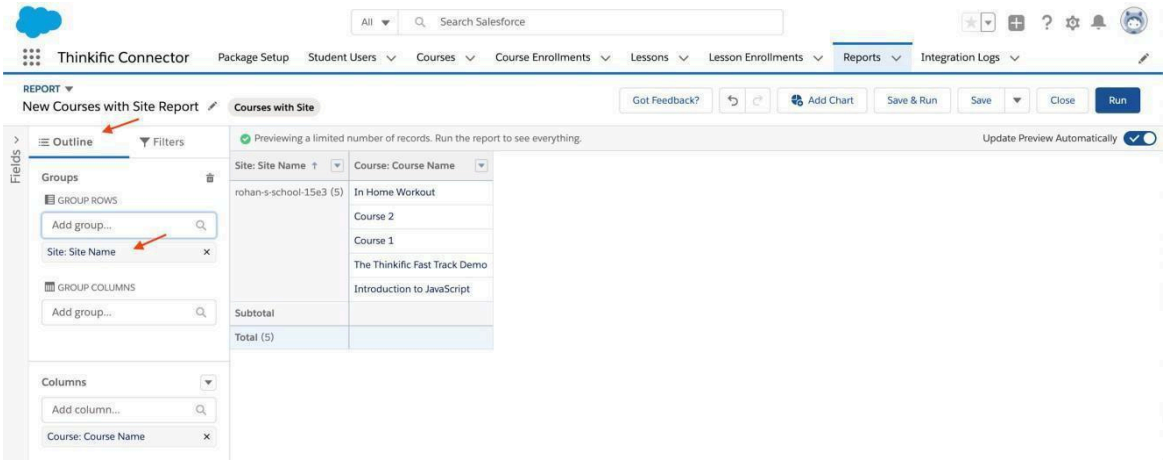
52. Choose the **Course with Site** report type and click on the **Continue** button.



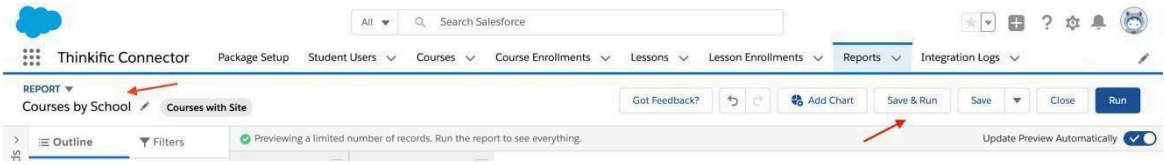
53. Change the report filter from *Show me My courses* to *Show me All courses*.



54. Add the **Site Name** in Grouped Columns Fields Group.



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

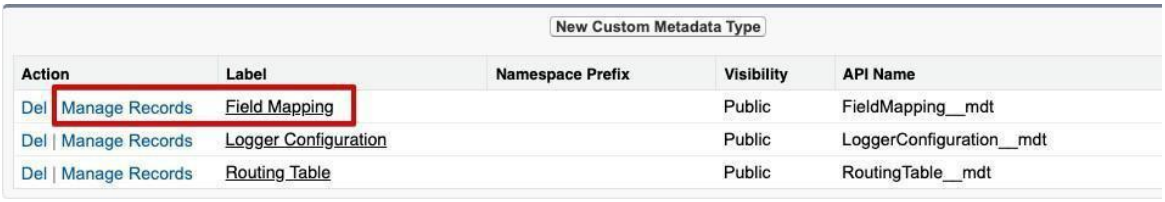


School × Salesforce Data Mapping

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:

56. Open the **Salesforce Setup Page**.
57. Search for **Custom Metadata Types**.



58. Click on **Manage Records** of the **Field Mapping** custom metadata.

The field mapping is defined as follows:

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

Field Mapping