

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

Functionalities not available in Salesforce Classic:

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

#### Limitations

The current Thinkific Salesforce Connector doesn't sync existing School data. Only new events will be sent to the Salesforce Org. This means that once you set up the connector, any new enrollments will be sent from Thinkific to Salesforce but historical data will not be imported.

To add historical data, you will need to export student data from Thinkific and upload it as a CSV into Salesforce.

#### **Requirements**

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

- Learn about Salesforce My Domain <u>here</u>.
- Learn how to enable Salesforce My Domain here.

## Step 1: Installing Thinkific Salesforce 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 <u>(Sandbox installation</u> or <u>Product installation</u>) and follow the instructions.

- <u>Sandbox installation</u> (For beta/testing purposes)
- <u>Production installation</u> (Full package release)
- 1. Choose the type of installation: Install for **Admins Only**, Install for **All Users** or Install for **Specific Profiles**.
- 2. Enter the Installation Key tqF5BInRG90TgpBK1dWi7itgsrkVr2SI
- 3. Verify that you have read the *acknowledgement message*.
- 4. Click on the **Install** button.



After you have completed the installation process, the package will be visible on the <u>Salesforce Installed</u> <u>Packed</u> page. To access it go to the **Salesforce Setup** page and in the **Quick Find** input box type **Installed Packages**.

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



See below for an example of the **Installed Packages** page:

nstalled	Package	S						
1 AppExchange	e you can browse,	test drive, download, and install pre-built a	apps and components rig	ht into your salesforce.co	om environment. <u>Learn Mor</u>	e about Insta	lling Pack	ages.
d customize be apending on the remove a pac nstalled Pac	efore deploying. Ye e links next to an i kage, click <b>Uninst</b> <b>ckages</b>	ou can deploy the components individually nstalled package, you can take different ac all. To manage your package licenses, clic	using the other features ations from this page.	in setup or as a group by	y clicking Deploy.	Limite	A	Take
Action	Package Name ThikificGS	Publisher Groundswell Cloud Solutions Inc.	0.1 (Beta 265)	tkas	Install Date 4/24/2020, 1:08 PM	Limits	Apps 1	Tabs 8
	Description	actor for Thinkifia	,					
	Salesforce Conn							

## Thinkific Salesforce Connector Lightning Application

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

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

Sales Home Opportunities V	Lead		Sales	Home	Opportunit	es 🗸	Lea
<ul> <li>Q. βearch apps and items</li> <li>Apps</li> </ul>		् App:	Thinkific C <b>s</b>	connector		8	)
Service		тс	Thinkific	Connector			
Marketing		Item	าร				
Fo Force.com		No re	esults				
🙉 Community		View	/ All				
E Content	unit	300к -			Add	the opp	ortuni
si Site.com		200%			perfo	ormance	
Sales		2006					
View All		100к					

After opening the Thinkific Connector Lightning Application for the first time you will need to configure the Thinkific Salesforce Connector.

Fore more details about the Thinkific Connector Lightning Application please view the <u>Thinkific</u> <u>Connector Lightning Application in the details</u> below

## Step 2: Configuring Thinkific Connector Package

Now that you've installed the package, it is time to do a one-time configuration to connect the Salesforce Org<sup>\*</sup> to your Thinkific schools. To start the connector configuration go to the <u>Thinkific Connector</u> <u>Lightning Application</u> and open the *Package Setup* tab.

The configuration is made in two steps:

- <u>Set up the Force.com Site</u> used to receive data from the Thinkific School.
- <u>Setup the School connection</u>.

\*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 is set up 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.

		All	<ul> <li>Q Search Sa</li> </ul>	esforce			* •	• ?	¢ 🖡 👩
Thinkifi	c Connector	Package Setup	Student Users 🗸 🗸	Courses 🗸	Course Enrollments	🗸 Lessons 🗸	Lesson Enrollments 🗸 🗸	Integration	Logs 🗸 🏑
📌 Packaş	ge Setup								
Settings Editor Thinkific -	Salesforce C	onnector							
							Next Step		
	Set This Setu Not	t up the Site & a s site will be used to up. If you don't hav te : Once the Force.	Add it o expose the webservic e the Force.com Site U com URL is set, it can	e endpoints. You RL, please refere <b>not be changed c</b>	i can add more schools ir nce the instruction set be and all following school o	oformation to this l slow. connection setting	JRL once you finish the		
	* Fo	orce.com Site URL ( orce.com site URL /erify URL C	Save						

### Create a new Force.com Site

<b>~</b>				
Setup Home Objec	Setup Home			
Q Quick Find	Q Sites			
Setup Home	✓ User Interface			
Lightning Experience Transition Assistant	<ul> <li>Sites and Domains</li> <li>Custom URLs</li> </ul>			
New Salesforce Mobile App QuickStart	Domains			
Lightning Usage	Sites			
ADMINISTRATION	✓ Security			
> Users	CSP Trusted <mark>Sites</mark>			
> Data	Didn't find what you're looking for			

1. From the **Salesforce Setup Page** select or type **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.

Sites
Sites Help for this Page 🥹
What is a Site?
Salesforce sites enables you to create public websites and applications that are directly integrated with your Salesforce.com organization—without requiring users to log in with a username and password. You can publicly expose any information stored in your organization through pages that match the look and feel of your company's brand. Use sites to create public community sites to gather customer feedback, branded login and registration pages for your portal. Web forms for capturing and so on.
Because sites are hosted on Salesforce servers, there are no data integration issues. And because sites are built on native Visualforce pages, data validation on collected information is performed automatically. You can allow users to access your site through your unique Salesforce domain and URL, or you can register your own branded domain or subdomain to redirect to your site.
Create multiple sites that appeal to different audiences and satisfy your company's various business needs. For example, a software company could create one site for new developers, another for customers, and a third for marketing.
Sample sites URLs MyCompany.force.com/ MyCompany.force.com/ MyCompany.force.com/partners
To get started, first register your company's Salesforce site domain. Your Salesforce site domain must be unique and must consist of only alphanumeric characters. Salesforce.com recommends using your company's name or a variation of your company's name, such as 'mycompanyportal.'
You cannot modify your Salesforce site domain name after the registration process.
http://     -developer-edition.na174.force.com     Check Availability       I have read and accepted the Salesforce Sites Terms of Use     Register My Salesforce Site Domain

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

		Your Force.com Domain MyCompany.force.com	Your S MyCompany force of MyCompany force of MyCompany force of MyCompany force of Create Your For	iites com/developers com/customers com/marketing rce.com Sites		
Your Salesforce site domain Salesforce Sites <u>Terms and</u> Settings	name is <b>tkf-domain-example</b>	-developer-edition.na174.force.com				
Settings         Image: These settings affect all Salesforce sites.         Image: These settings affect all Salesforce Sites guest users to a default owner in the org Image: The set of the se						
Allow using standard extension	rnal profiles for self-registration	and user creation.				
Sites (tkf-domain-examp dition.na174.force.com	)	New				

- 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

SETUP Sites		
Site Edit		Help for this Page 🥝
New Site	Save Cancel	
Site Label	Thinkific i	
Site Name	Thinkific	
Site Description		
Site Contact	Leo Berardino	
Default Web Address	http://tksf-integration-developer-edition.na174.force.com/ thinkific	
Active		
Active Site Home Page	InMaintenance	
Inactive Site Home Page	InMaintenance 🕙 (Preview)	
Site Template	SiteTemplate	
Site Robots.txt		
Site Favorite Icon	93	
Analytics Tracking Code	i	
URL Rewriter Class		
Enable Feeds		
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	
Require Secure Connections (HTTPS)		
Lightning Features for Guest Users		
Upgrade all requests to HTTPS	2 i	
Enable Content Sniffing Protection		
Enable Browser Cross Site Scripting Protection		
Referrer URL Protection		
Guest Access to the Support API		
	Save Cancel	

#### **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.

Sites					
site Details Thinkific				Help for this Page 🥝	
« <u>Back to List: Sites</u> Site Detail	Edit Public Access Sett	ings Login Settings URL Redirects Deactivate			
Site Label	Thinkific	Site Name	Thinkific		
Site Description		Site Contact	Leo Berardino		J
Active	$\checkmark$	Login	Not Allowed		
Active Site Home Page	tkgs.InMaintenance [Preview]	Site Favorite Icon			
Inactive Site Home Page	tkgs.InMaintenance [Preview]	Site Robots.txt			
Site Template	tkgs.SiteTemplate [Preview]	Enable Feeds			
Analytics Tracking Code		URL Rewriter Class			
Clickjack Protection Level	Allow framing by the same origin only (Recommended	) Require Secure Connections (HTTPS)	<ul> <li>✓ 1</li> </ul>		
Lightning Features for Guest Users	i i	Upgrade all requests to HTTPS	✓ 1		
Enable Content Sniffing Protection	✓ 1	Enable Browser Cross Site Scripting Protection	🖌 🚺		
Referrer URL Protection	🖌 👔	Guest Access to the Support API			
		Created By	Leo Berardino, 2020-03-02 2:12 p.m.		
Last Modified By	Leo Berardino, 2020-04-27 2:25 p.m.           Edit         Public Access Sett	ings Login Settings URL Redirects Deactivate			

2. In the Thinkific profile page click on **Object Settings** hyperlink. If you don't have the enhanced profile interface enabled follow the steps on the <u>here</u> enable it.

Profiles			
Profile Thinkific Profile			Help for this Page 🤣
Q Find Settings	Edit Properties		
Profile Overview		Assigned Users	
User License	Guest User License	Custom Profile	
	$\checkmark$	Created By Rohan	n Gore, 3/31/2020, 12:43 PM
Last Modified By	Leo Nicholas, 5/5/2020	6:02 PM	
Apps		Assigned Apps Settings that specify which apps are visible in the app menu Assigned Connected Apps	
		Settings that specify which connected apps are visible in the app menu <u>Object Settings</u> Permissions to access objects and fields, and settings that specify which record types, page law	avouts. and tabs are visible
		App Permissions Permissions to perform app-specific actions, such as "Manage Call Centers"	
		Apex Class Access Permissions to execute Apex classes	

3. Click on the **Contacts** hyperlink.

Profiles	222 - 3114 - 17 - 33003220001			
2MS Home	-		Tab Hidden	-
CMS Workspaces	-		Tab Hidden	-
Communication Subscription Channel Types	No Access	8	Tab Hidden	Not Assigned
Communication Subscription Consents	No Access	13	Tab Hidden	Not Assigned
Communication Subscriptions	No Access	8	Tab Hidden	Not Assigned
Communication Subscription Timings	No Access	11	Tab Hidden	Not Assigned
Contact Point Consent	No Access	10	Tab Hidden	Not Assigned
Contact Point Emails	No Access	12		Contact Point Email Layout
Contact Point Phones	No Access	17	-	Contact Point Phone Layout
Contact Point Type Consent	No Access	11	Default On	Contact Point Type Consent Layout
Contacts	No Access	30	Tab Hidden	Contact Layout
2ontent			Tab Hidden	
Contracts	No Access	23	Tab Hidden	Contract Layout
Course Enrollments	No Access	10	Tab Hidden	Course Enrollment Layout
Courses	No Access	10	Tab Hidden	Course Layout
Dashboards			Tab Hidden	
Data.com			Tab Hidden	
Data Use Purposes	No Access	4	Default On	Data Use Purpose Layout
Documents	No Access		Tab Hidden	
Email Messages	-	25	-	Email Message Layout
Email Templates			Tab Hidden	
	M. A	-	<b>T</b> 1 1 1 1 1 1	

4. Click on the *Edit* button.

SETUP Profiles		
Profile Thinkific Profile	Help for this f	age 🥝
C Find Settings   Edit Properties		
Profile Overview > Object Settings  Contacts		
Contacts	Edit 4	

5. Enable **Read Permission** for the object and **Read Access** for the **Contact** email fields, then click on the **Save** button.

ノバマ カモノフロシー ふいい		714 / ///// · · · ·
Q SETUP		
Profiles		
		Sille aviit
Master		
master	Contact Layout	0
Object Permissions		
Permission Name	Enab	ed
Read		←
Create		
Field Permissions		
Field Name	Read Access	Edit Access
Account Name		
Assistant		0
Asst. Phone	0	0
Birthdate	0	0
Contact Owner		
Created By		
Data.com Key		
Department		
Description	0	0
Description De Not Call		
Do Not Call		
Email		
Email Opt Out		

6. After saving the **Contacts** permissions click on **Profile Preview** hyperlink.

SETUP Profiles	
Profile Thinkific Profile	Heip for this Page 🤣
C Find Settings	
Profile Overview > Object Settings  Contacts	

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

Profiles				ZZ - 5333 - 1 ( -				
Profile Thinkific Profile						Help for this Page 🥹		
Q Find Settings	Edit Properties							
Profile Overview		Assigned Users						
Description								
User License	Guest User License			Custom Profile	$\checkmark$			
Look Mad Mad Do	Cista Mathaux 2020 05	01.0-54		Created By	Leo Berardino, 2020-03-02, 2:12 p.m.			
Last mounied by	<u>Onto Mathew</u> , 2020-03-	01, 0.04 p.m.						
Apps								
		Assigned Apps Settings that specify which	apps are visible in the app menu					
		Assigned Connected App Settings that specify which	<u>is</u> connected apps are visible in the app m	ienu				
Object Settings Permissions to access objects and fields, and settings that specify which record types, page layouts, and tabs are visible								
	App Permissions Permissions to perform app-specific actions, such as "Manage Call Centers"							
		Apex Class Access Permissions to execute Ape	ex classes					

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

1	SETUP Profiles									
Thin	kific Profile							ŀ	lelp for this Pag	e 🕜
On this p In additic	page you can create, view, and mai on, download SalesforceA to view a	nage user and edit u	s. ser details, reset passwords, and perform other administrat	tive tasks from your mol	bile devices: iOS	<u>6</u> l <u>Androic</u>	1			
				A   B   C   D   E   F   G	H   I   J   K   L	MNO	P   Q   R	S   T   U   V   W   >	X   Y   Z   Other	r All
Action	Full Name 🕇	Alias	Username		Last Login	Role	Active	Profile	Manager	
Edit	Site Guest User, Thinkific	guest	thinkific@tksf-integration-developer-edition.na174.force.com				$\checkmark$	Thinkific Profile		•
				A   B   C   D   E   F   G	H   I   J   K   L	M   N   O	P   Q   R	S   T   U   V   W   >	. │ Y │ Z │ Othe	r All

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

Users			
r St			
ninkific Site Guest Us	ser		🔤 Help for this Page 🍕
Permission Set Assignments [0]	I Permission Set Assignments: Activation Required [0] I Permission Set Lice	ense Assignments [0]   Public Group Mem	bership [0]   Queue Membership [0]   Installed Mobile Apps [0]
Jser Detail	Edit Sharing		
Name	Thinkific Site Guest User	User License	Guest License
Alias	guest	Profile	Thinkific Profile
Email	leonardo@gscloudsolutions.com	Active	✓
Username	thinkific@tksf-integration-developer-edition.na174.force.com	Marketing User	
Nickname	Thinkific 🚺	Mobile Push Registrations	View
Division		Data.com User Type	1
Time Zone	(GMT+00:00) Greenwich Mean Time (GMT)	Mobile User	✓ 1
Locale	English (Canada)	Salesforce CRM Content User	
Language	English	Email Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)
Federation ID			
p Registration: One-Time Password Generator	<u>i</u>		
App Registration: Salesforce Authenticator	1	Used Data Space	10 KB [ <u>View]</u>
Security Key (U2F)	1	Used File Space	0 B [ <u>View]</u>
Lightning Login	1	Individual	
mporary Verification Code (Expires in 1 to 24 Hours)	[Generate]		
Created By	Leo Berardino, 2020-03-02, 2:12 p.m. Edit Sharing	Modified By	<u>Leo Berardino</u> , 2020-04-06, 5:38 p.m.
	Edit Assignments		Permission Set Assignments Help ?

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

Permission Sets	Permission Sets
Permission Bet Assignments Thinkific Site Guest User	Permission Set Assignments Thinkific Site Guest User
Save     Cancel       Available Permission Sets     Enabled Permission Sets       Monufacturing Sales Agreements     Add       Manufacturing Sales Agreements     Add       Sales force CMS Integration Admin     Salesforce Consolutuser       Salestorce CMS Integration Admin     Salestorce Consolutuser       Salestorce CMS Integration Admin     Remove       Salestorce CMS Integration Admin     Remove       Standard Einstein Activity Capture     Remove	Available Permission Sets     Enabled Permission Sets       Manufacturing Analytics Admin Manufacturing Sales Agreements Manufacturing Sales Agreements For Community Salesforce Console User Salesforce Console User Sarvice Cloud User Standard Einstein Activity Capture Survey Creator     Add Remove
Save Cancel	Save Cancel

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

Permission Set Assignments		[Edit Assignments]	Permission Set Assignments Help 🕐
Actio	n Permission Set Label		Date Assigned
Del	Thinkific Connector data access permission		2020-05-04

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

- 1. Go back 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.

SETUP Sites							
MyCompany force.com/marketing Create Your Force.com Sites							
Your Salesforce site domain name is <b>tkst-integration-developer-edition.na174.for</b> Salesforce Sites <u>Terms and Conditions</u>	Your Salesforce site domain name is tks1-integration-developer-edition.na174.force.com Salesforce Sites Terms and Conditions						
Settings							
These settings affect all Salesforce sites.	Open Link in New Tab Open Link in New Window Open Link in Incognito Window						
Assign new records created by Salesforce Sites guest users to a default owner in     Allow using standard external profiles for self-registration and user creation.	Save Link As Copy Link Address						
Save Cancel	Copy Go to http://tksf-integration-developer-edition.na174 Print						
Sites (tksf-integration-developer- edition.na174.force.com)	LastPass						
Action Site Label * Site URL	Inspect	Last Modified By					
Edit   Deactivate Thinkific http://tksf-integration-developer-edition.na174	Speech Services	.eo Berardino, 2020-04-27, 2:25 p.m.					

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

-		Q Search Setup					$\star$	🗄 ? 🌣 🌲 🐻
Setup Home Object	t Manager 🗸							
Q Remote Site Settings	SETUP Remote Sit	e Settings			-) ( <i>_////</i> ``			
Remote Site Settings	All Remote Site							Help for this Page 🥹
Didn't find what you're looking for? Try using Global Search.	Didn't find what you're looking fo? Try using Global Search. Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site. View: All Remote Sites ‡ Create New View A							
			N	ew Remote Site				
	Action Remote Site N	ame	Remote Site URL	Active	Created By	Created Date	Last Modified By	Last Modified Date
	Edit   Del 📥 <u>Thinkific Api</u>	tkgs	https://api.thinkific.com	1	Anthony, John	4/24/2020, 1:08 PM	Anthony, John	4/24/2020, 1:08 PM
	Edit   Del 📥 <u>Thinkific_Plat</u>	orm tkgs	https://platform.thinkific.com	1	Anthony, John	4/24/2020, 1:08 PM	Anthony, John	4/24/2020, 1:08 PM
					A   B   C   D   E   F	- G   H   I   J   K   L   M   M	4   O   P   Q   R   S   T	U   V   W   X   Y   Z   Other <b>All</b>

- 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.

Remote Site Set	tings	
Remote Site Edit	Help for this Page 🔞	
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	Thinkific_Site	
Remote Site URL	https://[YOUR SITE URL HERE]	
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 <u>Thinkific Salesforce Connector Lightning Application</u>
- 2. In the *Package Setup* tab paste your *Force.com Site URL* in the input box.

¢ <sup>♥</sup> Package Setup	
Settings Editor Thinkific - Salesforce C	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         *force.com Site URL         *thtps://YOUR FORCE.COM SITE URL HERE!         Verify URL C

- 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.

### 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.

✿ Package Setup							
Settings Editor Thinkific - Salesforce Connector							
	Previous Step						
	Create a list of schools Use the 'Add School' button to add to 'edit' or 'remove' a specific entry.	new school details. The below table You can also test an existing connec	show the school details wh tion.	ch are already saved in the system. You may choose			
				+ Add School			
	Subdomain	✓ Verify API Key	Edit	Remove			

### **Connecting to a School**

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

Add New Sch	ool Information
School User Relationship	
Select the corresponding 'Contact' field to map T	hinkific user's email
*Thinkific field 🚯	* Contact field
Select 🔻	Select 💌
Subdomain *School API Key	
API Key value	
Verify API Key C	
	Cancel Save & New 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 with

a Salesforce Contact. Orphans records could be linked to Contacts in the Student Users tab of the Connector Lighting Application.

• 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

THINKIFIC Q	Site Learning content	Orders & accounts Code & analytics
MANAGE LEARNING CONTENT	Site footer code	WEBHOOKS →
DESIGN YOUR SITE	Order tracking code	
MARKET & SELL	Signup tracking code	API This is your Thinkific API key. Use this key to integrate with Wordpress.
ADVANCED REPORTING BETA	tag	API Key
SUPPORT YOUR STUDENTS	Webhooks	RESET API KEY
SETTINGS	API	This is your Thinkific subdomain, which may be needed along with your API key for some integrations.
leonardo's account		Subdomain
() Upgrade		*
🙁 Help center 🦻		Single Sign On (SSO) is available on the Premier plan.  () UPGRADE NOW
( Updates		

- Click on Verify API Key button
- Click on Save button
- Repeat those steps for all schools

Now you 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.

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***	Thinkific Connector Package Setup	Student Users 🗸 Courses 🗸	Course Enrollments 🗸 Lessons 🗸	Lesson Enrollments 🗸 Reports	✓ Integration Logs ✓	
<b>1</b> ite	Student Users All	nt users • Updated a minute ago	9 ( <i>1772 -</i> SUG 17 SUMOMME)	New Q Search this list	Import Change Owner	Printable View
5	Student User Name 1	Email	✓ Last Sign In	✓ Student Contact	✓ Thinkific Id	~
1	James Parker	jamesp@email.com	2020-04-27, 5:26 PM	James Parker	20419633	

### 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

			All 🔻	Q Search St	tudent Users and more					*	2	) ŵ	
000 000 000	Thinkific Connector	Package Setup	Student Users 🗸	Courses 🗸	Course Enrollments 🗸	Lessons $\checkmark$	Lesson Enrollments $$	Reports	∽ Inte	egration Logs 🥄	/		
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	<ul> <li>All (Pinned list)</li> </ul>				it Sign In		✓ Student Cor	ntact	∨ Th	ninkific Id			~
1	Recently Viewed				20-04-27, 5:26 F	M			20	0419633			
	Students without Cont	act 🔶											

#### 2. Click on the Student Contact edit button

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5-71 C		ーノボペークルモンアル	//////////////////////////////////////		-') (_/	(///_=_\\\\\$//_\\\	MUIIII ( ).	ホモリモン	////:=\.\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\		IIII:17	カペーチリーン	[]]]:=\	111:1		Simile ,
2	Student Users Students without Cont	tact 🔻 🖈								New	Impor	t Change	e Owner	P	rintable	View
1 iten	• Sorted by Student User Name • Filt	tered by all studen	t users - Student Contact	Updated a few s	econds a	ago			Q. Search this	s list		\$ ·	<b>II</b> •	C,	/	5 <b>Y</b>
1.0	Student User Name 1	~ 1	Email		$\sim$	Last Sign In		~	Student Cor	itact	$\sim$	Thinkific Id			~	,
1	James Parker	j	м				1	20419633								

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

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0 0 0 0 0 0 0	Thinkific Connector Package Setup	Student Users 🗸 🧹	Courses 🗸	Course Enrollments 🗸	Lessons 🗸	Lesson Enro	llments 🗸	Reports	∨ Integ	gration Logs 🗸 🗸			
	Student Users	///.= <sup>-</sup> .\\\\$//~\\\\\\\\	JIIII C JANE	91 ( <i>7777)</i> - 11677 MG		118-71 (- <i>71</i>	//////////////////////////////////////		IIIIII (C - ) IN	&Л( <i>/////**</i> *		11:11111	
2	Students without Contact 🔻 🖈						O. Casarah this	New	Import	Change Owner	Pr	intable V	iew
1 iter	n • Sorted by Student User Name • Filtered by all stude	nt users - Student Contact	Updated a few se	econds ago			Q Search this	5 IIST		₩ · III ·	e	/ 6	<b>T</b>
	Student User Name ↑ ∨	Email		✓ Last Sign In		~	Student Con	tact	∨ Thi	nkific Id		$\sim$	
1	James Parker	jamesp@email.com		2020-04-27, 5:26	PM		Search Con	tacts		Q			
							📧 Jam + New	es Parker r Contact					

4. Save the Student User record.

			All 🔻	Q Search St	tudent Users and more						* -		?	¢	Ļ (	6
000 000 000	Thinkific Connector	Package Setup	Student Users 🗸	Courses 🗸	Course Enrollments $\lor$	Lessons 🗸	Lesson E	Enrollments 🗸	Reports	∽ Inte	gration Lo	gs 🗸				
1 iter	Student Users Students without Co	ontact 🔻 💉	nt users - Student Contac	ct • Updated 5 min	nutes ago		11:05-71 (	Q. Search thi	New s list	Import	Change Ø •	e Owner	C,	Printab	le Viev	v T
	Student User Name 1	► × E	mail		∨ Last Sign In		~ 5	Student Contact		~ .	Thinkific Io	1			~	
1	James Parker	ja	mesp@email.com		2020-04-27, 5:26 PM		J	James Parker		:	20419633				ŀ	•
								*								
					Cancel Sa	ve 🔶	_									

### 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.

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	•	Thinkific Connector	Package Setup	Student User	rs 🗸 Courses	✓ Course	e Enrollments 🗸 🗸	Lesso	ns 🗸 🛛 Lesson En	rollments 🥆	🗸 Reports 🥆	/ Inte	egration Logs	/			/
1	u) item	Courses All V F · Sorted by Course Name · Filt	ered by all courses • Up	odated 2 minutes	ago	788-71 (77	//////////////////////////////////////			Q Search	New	Import	Change Ow	ner • C	Printa	able Vie	ew T
		Course Name 1		✓ Site		~	<ul> <li>Slug</li> </ul>	$\sim$	Thinkific Id	∨ Ow	ner First Name	$\sim$	Owner Last Na	ame		$\sim$	
	1	The Thinkific Fast Tra	ack Demo	rohan	-s-school-15e3		the-thinkific-fa	st	629379	Thir	hkific		Site Guest Use	r			

### Course Enrollment Tab

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

		All 💌	Q Search Cou	urse Enrollments and more			*• 🗄 ? 🌣 🐥 👼
***	Thinkific Connector	Package Setup Student Users	🗸 Courses 🗸	Course Enrollments 🗸 L	essons 🗸 Lesson E	Enrollments 🗸 Reports 🗸	Integration Logs 🗸 🧳
E 1 iter	Course Enrollments All V F n • Sorted by Course Enrollment N	ame • Filtered by all course enrollments • l	Jpdated a few seconds	ago		Q. Search this list	New     Import     Printable View       ☆ •     Ⅲ •     C'     ✔     ♥
	Course Enrollme ↑	∨ Course	✓ Progress	✓ Student User	✓ Thinkific Id	✓ Created At	✓ Complet ✓ Complet ✓
1	ENROL-00563	The Thinkific Fast Track Demo	37.50%	James Parker	58141520	2020-04-24, 1:43 PM	

### Lessons Tab

Shows the Course Lessons and their type.

				All 🔻	Q Search Le	essons and r	nore								*		?	ŵ	Ļ	6
000 000 000	Thinkific Co	nnector Package Setup	Student U	lsers 🗸	Courses 🗸	Course Er	rollments 🗸	Lesso	ons 🗸	Lesson E	Enrollı	ments 🗸	Reports	√ Int	egration Lo	ogs 🗸				
È	Lessons All 🔻 🖡	1444110 <i>4447 - 17</i> 38-14 (7			JMB(C - JNN		2-5,1113   7 - N		11:1 <i>7 -</i> 11:	NE-71 (			New	Import	Chang	e Owner		Printab	le Viev	w
13 ite	ms • Sorted by Less	on Name • Filtered by all lessons • I	Jpdated a few	seconds ag	0						L u	Search th	is list		<b>\$</b>	•	G		C	Ť
	Lesson N	ame 1	∨ Cou	rse		$\sim$	Thinkific Id	$\sim$	Туре		$\sim$	Created D	ate	$\sim$	Last Mo	dified Da	ate		$\sim$	
1	Adding y	our lessons	The	Thinkific Fa	ast Track Demo		10886007		Video			2020-04-2	7, 5:27 PM		2020-04	-27, 5:27	7 PM			•
2	Before yo	u begin	The	Thinkific Fa	ast Track Demo		10885997		Iframe			2020-04-2	7, 5:26 PM		2020-04	-27, 5:26	5 PM			•
3	Before yo	u begin	The	Thinkific Fa	ast Track Demo		10885998		Survey			2020-04-2	7, 5:26 PM		2020-04	-27, 5:26	5 PM			•
4	Creating	your online course	The	Thinkific Fa	ast Track Demo		10886006		Video			2020-04-2	7, 5:27 PM		2020-04	-27, 5:27	7 PM			•
5	Get the F	ast Track Workbook!	The	Thinkific Fa	ast Track Demo		10886002		Downloa	d		2020-04-2	7, 5:26 PM		2020-04	-27, 5:26	6 PM			•
6	How to u	se this course	The	Thinkific Fa	ast Track Demo		10885995		Lesson			2020-04-2	7, 5:26 PM		2020-04	-27, 5:26	5 PM			•
7	How to u	se this course	The	Thinkific Fa	ast Track Demo		10886001		Downloa	d		2020-04-2	7, 5:26 PM		2020-04	-27, 5:26	5 PM			•
8	Thinkific	examples	The	Thinkific Fa	ast Track Demo		10885999		HtmlIten	n		2020-04-2	7, 5:26 PM		2020-04	-27, 5:26	5 PM			•
9	Welcome	to the Thinkific Fast Track!	The	Thinkific Fa	ast Track Demo		10885994		Lesson			2020-04-2	7, 5:26 PM		2020-04	-27, 5:26	5 PM			•
10	Welcome	to Thinkific	The	Thinkific Fa	ast Track Demo		10886004		Video			2020-04-2	7, 5:27 PM		2020-04	-27, 5:27	PM			•
11	What is T	hinkific?	The	Thinkific Fa	ast Track Demo		10885996		Lesson			2020-04-2	7, 5:26 PM		2020-04	-27, 5:26	5 PM			•
12	What is T	hinkific?	The	Thinkific Fa	ast Track Demo		10886000		HtmlIten	ı		2020-04-2	7, 5:26 PM		2020-04	-27, 5:26	5 PM			•
13	Your com	ing soon page	The	Thinkific Fa	ast Track Demo		10886005		Video			2020-04-2	7, 5:27 PM		2020-04	-27, 5:27	7 PM			•

### Lessons Enrollment Tab

Shows the Lessons completed by the Student Users.

			All 🔻	Q Search L	esson Enrollments and mor	e					* •	Ð	? x	<b>h</b>	6
***	Thinkific Connector	Package Setup	Student Users 🗸	Courses 🗸	Course Enrollments $\lor$	Lessons 🗸	Lesson En	rollments 🗸	Reports	√ Inte	gration Log	s 🗸			
	Lesson Enrollments	- 711、7		SUMUC DAS	S) ( <i>1115</i> \\\\$ (1 \	()))) <i>                                 </i>	118-71 (- )		New	Import	Change	Owner	Pri	ntable V	iew
4 iter	ms • Sorted by Lesson Enrollment N	ame • Filtered by all	lesson enrollments • U	pdated a few secor	nds ago			Q Search thi	s list		\$ <b>1</b>		C,	r e	<b>Y</b>
	Lesson Enrollment Na	me 🕈 🛛 🗸	Course Enrollment	$\sim$	Created At	$\sim$	Lesson				∨ Com	pleted		$\sim$	
1	LES-ENR-00324		ENROL-00563		2020-04-27, 5:27 PM		Welcom	e to Thinkific			~				
2	LES-ENR-00325		ENROL-00563		2020-04-27, 5:27 PM		Your cor	ning soon page			~				
3	LES-ENR-00326		ENROL-00563		2020-04-27, 5:27 PM		Creating	your online cou	irse		~				
4	LES-ENR-00327		ENROL-00563		2020-04-27, 5:27 PM		Adding	our lessons			<b>v</b>				

### Integration Logs Tab

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

				All 🔻	Q	Search Integ	gratio	n Logs and more						*		?	ţ.	Û	6
000 000	Thinkific Connector	Package Set	up Student l	Jsers 🗸	Cour	rses 🗸 🔾	Course	e Enrollments 🗸 🗸	Lessons	✓ Lesson E	nrollments 🗸	Reports	∨ Integ	ration Lo	ogs 🗸				
	Integration Logs All Today 🔻 🖡	フパペーフト		A ANNUL	))IIIii(	イー ノ出ト・ク	1(_/			フド終-フ1(	//////////////////////////////////////	New	Import	Chang	e Owne	r	Printab	le Viev	v
50+ i	tems • Sorted by Integration Log Nam	ne • Filtered by	all integration lo	gs - Created I	Date •	Updated a fev	v seco	onds ago			Q Search thi	s list		\$	•	C	<b>*</b>	¢	•
6	Integration Log $\uparrow$ $\checkmark$	Type 🗸	ClassName		$\sim$	Method	$\sim$	Message				~	Created I	Date	$\sim$	Own	er 🗸		
1	a046g00000He4a0	Debug	tkgs.Communi	cationServic	e	logHeader	5	Header field -> Ho	ost: tksf-integ	gration-develope	er-edition.na174.	force	2020-04-	27, 7:02	PM	autop	proc	▼	
2	a046g00000He4a1	Debug	tkgs.Communi	cationServic	e	logHeader	5	Header field -> X-S	Salesforce-Fo	orwarded-To: na	174.salesforce.co	om	2020-04-	27, 7:02	РМ	autop	proc	▼	
3	a046g00000He4a2	Debug	tkgs.Communi	cationServic	e	logHeader	5	Header field -> X-S	Salesforce-VI	P: FORCE			2020-04-	27, 7:02	PM	autop	proc	▼	
4	a046g00000He4a3	Debug	tkgs.Communi	cationServic	e	logHeader	5	Header field -> X-S	Salesforce-SI	P: 35.174.148.9	8		2020-04-	27, 7:02	PM	autop	oroc	•	
5	a046g00000He4a5	Debug	tkgs.Communi	cationServic	e	logHeader	5	Header field -> Co	ontent-Type: a	application/jsor	ı		2020-04-	27, 7:02	PM	autop	proc	•	
6	a046g00000He4a6	Debug	tkgs.Communi	cationServic	e	doPost		43:39.114Z","upd	ated_at":"20	20-04-28T02:0	2:30.255Z","last_	perc	2020-04-	27, 7:02	PM	autop	oroc	•	
7	a046g00000He4a7	Debug	tkgs.Communi	cationServic	e	doPost		Is valid request:tru	ue				2020-04-	27, 7:02	PM	autop	proc		

### 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.



2. Click on the Logger Configuration Edit hyperlink.

\$	SETUP Custom Metadata Types							
Logge	r Configurations					Help for this Page 🔞		
View:	All      Edit   Create New View							
			New					
Action	Action Label † Logger Configuration Name Namespace Prefix Log Level Enable System Debug							
Edit   Del	Logger Configuration	Logger_Configuration		tkgs	ERROR			

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

P.S.: 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			Help for this Page 🥝
Logger Configuration Edit	Save Save & New Cancel		
Information			= Required Information
Label Logger Configuration Logger Configuration Name Logger_Configuratio Log Level ERROR © Enable System Debug ©	n i	Protected Component i Namespace Prefix tkgs	<pre></pre>
	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.

<b>&gt;</b>	All V Q Search Salesforce		* 🗄 ? 🌣 🖡 🐻
Thinkific Connector Package Setup Stud	dent Users 🗸 Courses 🦂 Course Enrollments 🗸 Less	ons 🗸 Lesson Enrollments 🗸 Reports	✓ James Parker ✓ X More ▼
SHC/1125-SUGU SUBUCE DUS-DUC-11125	SUBTERS IN STRUCT STRUCT STRUCT STRUCT	147 - 718-716 - 7772-5316 F.C. AMMER	NGC - HASSING - CALLES AND TO ANNUAL MULC
James Parker		Create User	Printable View Submit for Approval
		×	
Title Account Name Phone (2) 🔻	Email Contact Owner		
	Create Student Use	r	
Polated Dotails		ity	
	Choose a School to create the student user		
We found no potential duplicates of this	*Select the School	au	
	Select		
No duplicate rules are activated. Activate duplicate rules to			
			Write an email Compose
		Cancel	
Opportunities (0)		New	Filters: All time • All activities • All types
			Refresh • Expand All • View All
		✓ Upcoming &	Overdue
Cases (0)		New	

### 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*.

-				Q Searc	ch Setup				*	• 8	?	¢ 🖡	6
Setup	Home	Object Manager 🗸 🗸	-										
SETUP > OE Contac	BJECT MAN	AGER	))((~~				9):1(~						
Details		Page Layo 4 Items, Sorted	<b>uts</b> by Page Layout	Name				Q Quick Find	Nev	v Paş	ge Layou	ut Assign	ment
Fields & Relations	ships	PAGE LAYOUT	NAME		CREATED BY		MODIF	TED BY					
Page Layouts	←	Contact (Marke	eting) Layout		Rohan Gore, 20	020-02-27, 4:11 PM	Ginto M	Mathew, 2020-04-07, 5:34	PM				•
Lightning Record Buttons, Links, ar	Pages nd Actions	Contact (Sales	) Layout		Rohan Gore, 20	)20-02-27, 4:11 PM	Ginto M	Mathew, 2020-04-07, 5:34	+ PM				•
Compact Layouts	5	Contact (Supp	ort) Layout		Rohan Gore, 20	020-02-27, 4:11 PM	Ginto M	Mathew, 2020-04-07, 5:34	+ PM				•
Field Sets Object Limits		Contact Layour	t		Rohan Gore, 20	020-02-27, 4:11 PM	Ginto M	Mathew, 2020-04-22, 2:59	9 PM				•

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

3. Click on Mobile & Lightning Actions.

ielde	Quick Find Mobile	Action Name	)					
uttons	Add to Call List	Check for New Data	Edit	Log a Call	New Contact	New Note	Printable View	Submit for Ap
uick Actions	Call	Clone	Email	Mobile Smart Actions	New Event	New Note	Send Text	Update Conta
obile & Lightning 🛛 🚤	Change Owner	Create User	Email (mobile only)	New Account	NewGroup	New Opportunity	Sharing	View Contact
ctions	Change Record Type	Delete	Get Survey Invita	New Case	New Lead	New Task	Start Conversation	
panded Lookups								
Quick Actions in the	e Salesforce Classic Pu	blisher						
Quick Actions in the	e Salesforce Classic Pu	blisher						
Quick Actions in the	e Salesforce Classic Pu	blisher						
Quick Actions in the Email Salesforce Mobile a Actions	e Salesforce Classic Pu nd Lightning Experience	blisher :e						

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

ieius	Quick Find Mobile	Action Name	\$					
Buttons	Add to Call List	Check for New Data	Edit	Log a Call	New Contact	New Note	Printable View	Submit for App
uick Actions	Call	Clone	Email	Mobile Smart Actions	New Event	New Note	Send Text	Update Contac
lobile & Lightning	Change Owner	Create User	Email (mobile only)	New Account	NewGroup	New Opportunity	Sharing	View Contact I
suons	Change Record Type	Delete	Get Survey Invita	New Case	New Lead	New Task	Start Conversation	
xpanued Lookups								
Quick Actions in the	e Salesforce Classic Pu	blisher						
Quick Actions in the	e Salesforce Classic Pu	blisher						
Quick Actions in the	e Salesforce Classic Pu	blisher						
Quick Actions in the	e Salesforce Classic Pu	blisher						
Quick Actions in the	e Salesforce Classic Pu	blisher						
Quick Actions in the Email Salesforce Mobile a	e Salesforce Classic Pu nd Lightning Experienc	blisher e						
Quick Actions in the Email Salesforce Mobile a Actions	e Salesforce Classic Pu nd Lightning Experienc	blisher 'e						
Quick Actions in the Email Salesforce Mobile a Actions	e Salesforce Classic Pu nd Lightning Experienc Email Printable Vie	blisher :e w Submit for ,	Approval Get 5	Survey Invitation	Add to Call List	Delete C	hange Owner	
Quick Actions in the	e Salesforce Classic Pu nd Lightning Experienc	blisher e						

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

Contact James Parker	Å			 Create User	Printable View	Submit for Approval	
Title Account Name	Phone (2) 🔻	Email	Contact Owner				

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

#### Course

It stores a Thinkific School Course data.

Each Course is comprised of Lessons.

#### Lesson

It stores a Thinkific School Lesson data.

#### **Student User**

It stores a 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).

1. Go to the <u>Thinkific Connector Lightning Application</u> 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.

	Choose Report Type	
All Accounts & Contacts	Q Courses with Site	8
Opportunities Customer Support Reports Leads		
Campaigns Activities		
Contracts and Orders	Cancel	Continue

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

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∨ *Home ∨ × 🖋
Close     Run
te Preview Automatically 🗸

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

		ackago Sotup - Student	All  Q Search Sale	sforce		Losson Enrollmonts	Paparts + 4		8	?‡	• 🐻
R N	ew Courses with Site Report	Courses with Site			Got Feedback?	5 C & Add	Chart Save &	Run Save	•	Close	Run
>	≡ Outline ▼ Filters	Previewing a limited	number of records. Run the repor	t to see everything.				Upda	ate Prev	iew Auton	natically 🗸
ields	Groups	Site: Site Name 🕇 💌	Course: Course Name								
		rohan-s-school-15e3 (5)	In Home Workout								
	Add group Q		Course 2								
	Site: Site Name ×		Course 1								
			The Thinkific Fast Track Demo								
	IIII GROUP COLUMNS		Introduction to JavaScript								
	Add group Q	Subtotal									
		Total (5)									
	Columns  Add column  Course: Course Name ×										

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

-	All 🔻	Q Search Salesforce			*• +	? 🌣 🌲 🐻
Thinkific Connector Pa	ackage Setup 🛛 Student Users 🗸	Courses 🗸 Course Enrollments 🗸	Lessons 🗸 Lesson Enrollments	∨ Reports ∨	Integration Logs 🗸 🗸	
REPORT  Courses by School  Courses with	Site		Got Feedback? 5	Add Chart Save	& Run Save 💌	Close
> = Outline Filters	Previewing a limited number of re	cords. Run the report to see everything.			Update Pre	view Automatically 🔽