

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 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 [here](#).
- 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 ([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 the **Installation Key** *tqF5BlnRG90TgpBK1dWi7itgsrkVr2SI*
  3. Verify that you have read the **acknowledgement message**.
  4. Click on the **Install** button.

**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...

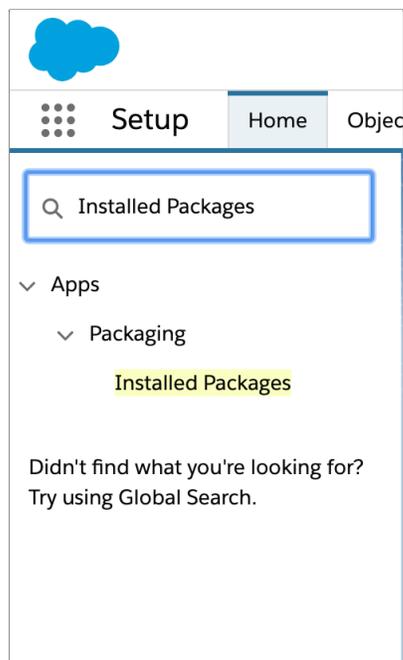
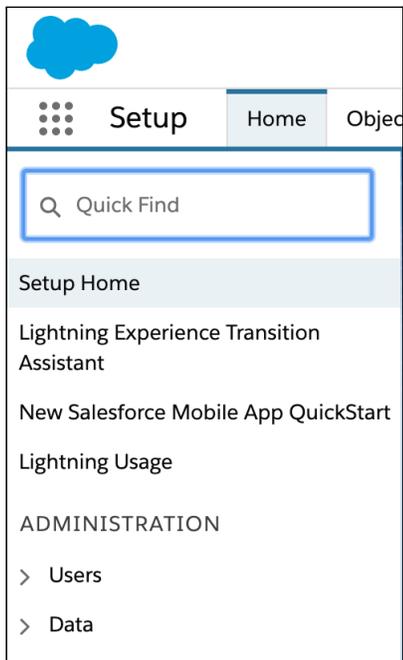
**Warning:** You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

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

**Install** **Cancel**

After you have completed the installation process, the package will be visible on 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 the **Installed Packages** page it's also possible to uninstall the package.



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

SETUP
Installed Packages

## Installed Packages

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	Obj
<a href="#">Uninstall</a>	<a href="#">ThikificGS</a>	Groundswell Cloud Solutions Inc.	0.1 (Beta 265)	tkgs	4/24/2020, 1:08 PM	✓	1	8	
	Description Salesforce Connector for Thinkific								

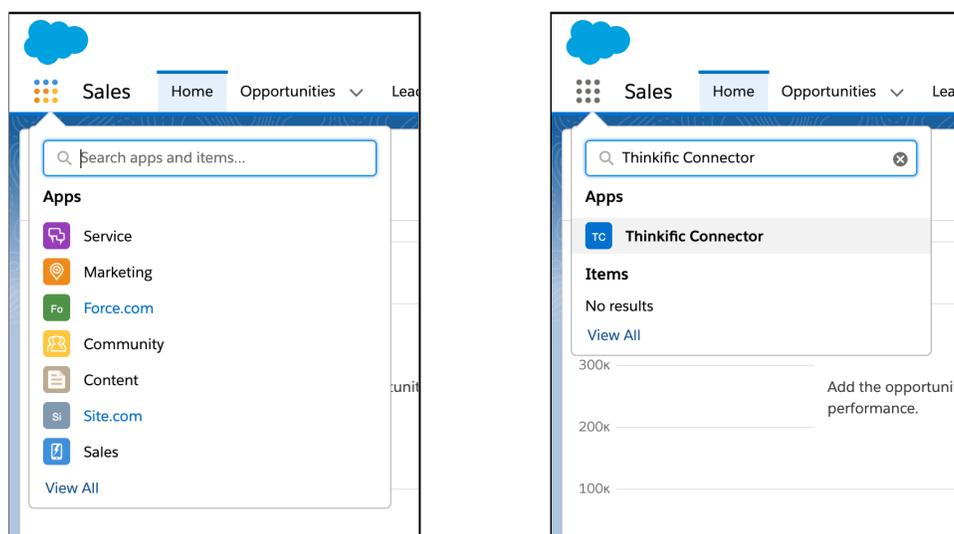
### Uninstalled Packages

No uninstalled package data archives

## 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**.



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

For more details about the Thinkific Connector Lightning Application please view the [Thinkific Connector Lightning Application in the details](#) 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\* 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:

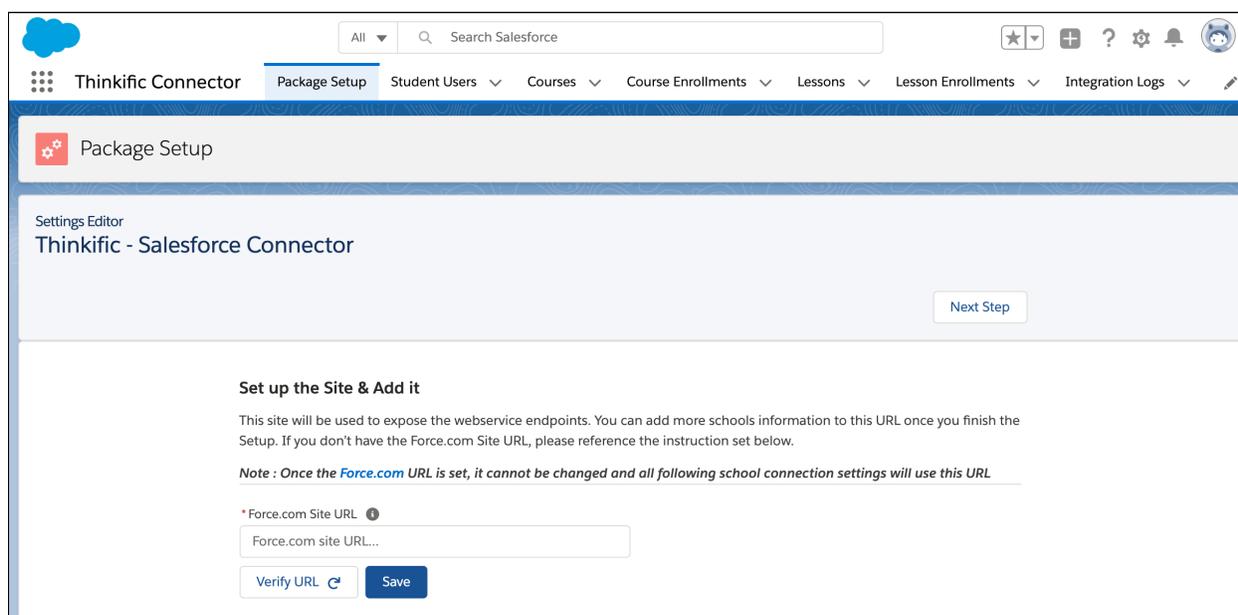
- [Set up the Force.com Site](#) used to receive data from the Thinkific School.
- [Setup the School connection](#).

**\*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 is set up you can switch back to Classic.**



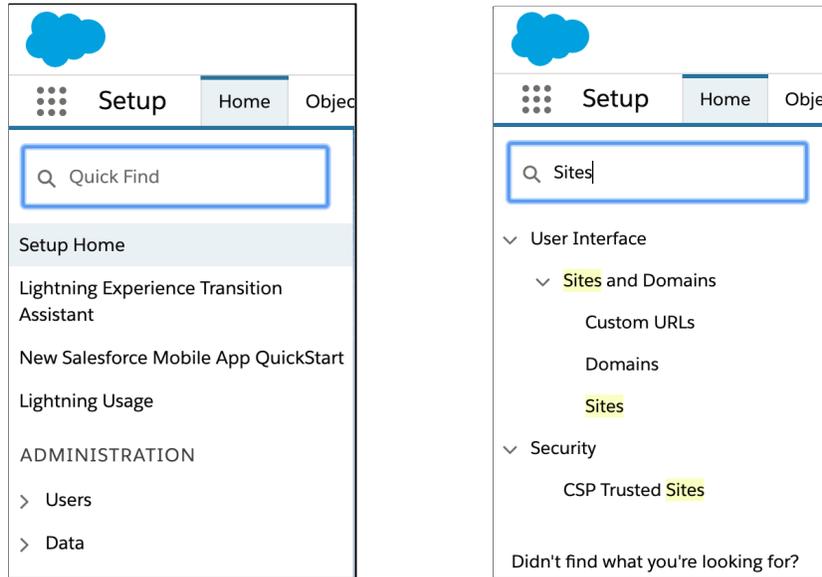
### 1) Setup the Force.com Site

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.

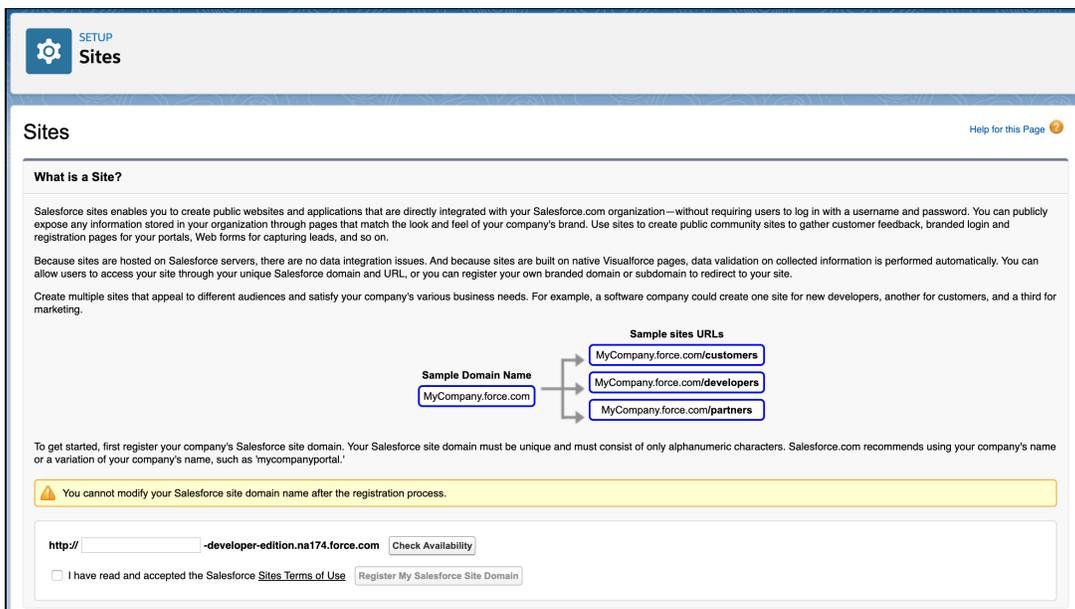


## Create a new Force.com Site

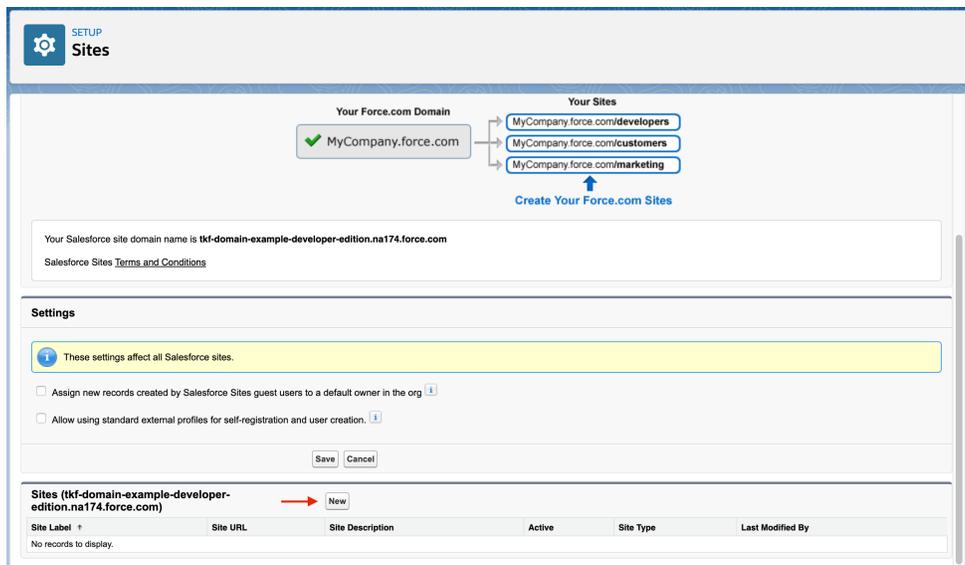
- From the **Salesforce Setup Page** select or type **Sites** in the **Quick Find** box, then navigate to **Sites**.



- 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.

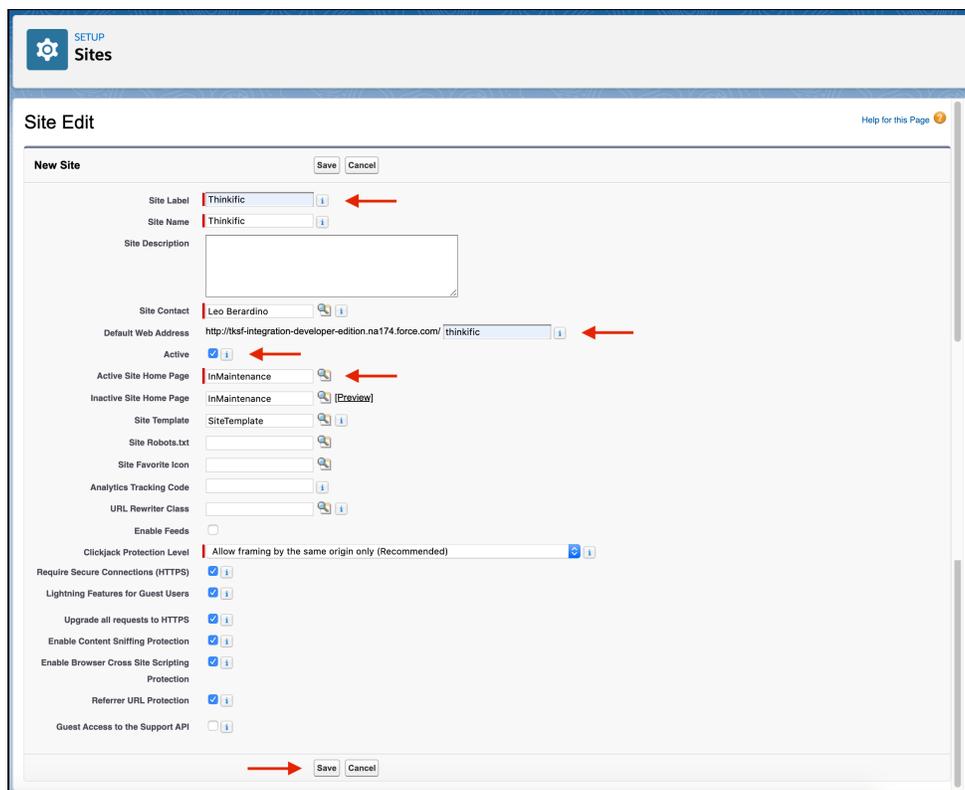


- Create a new site clicking on the **New** button.



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

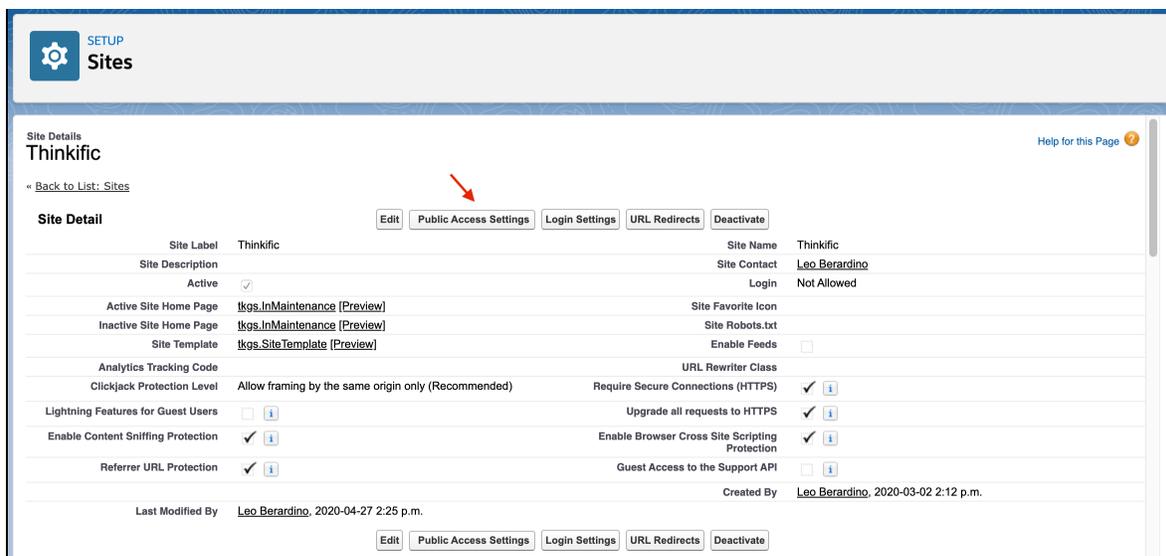
- Site Label: **Thinkific**
- Default Web Address: **thinkific**
- Active: **Checked**
- Active Site Home Page: **InMaintenance**



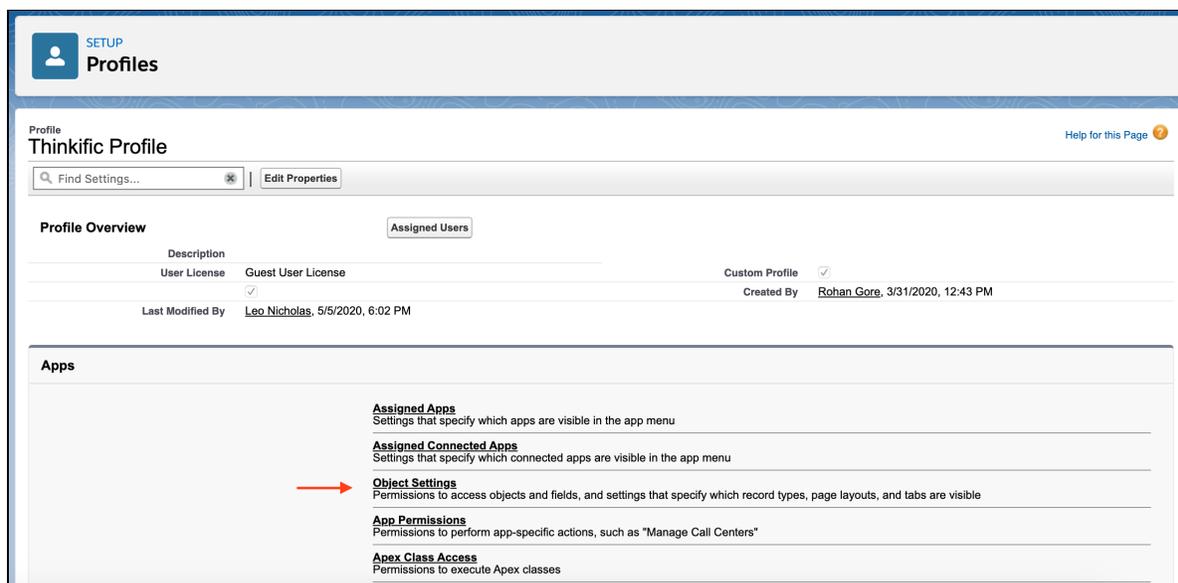
## Setup the Site Permissions

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 **Object Settings** hyperlink. If you don't have the enhanced profile interface enabled follow the steps on the [here](#) enable it.



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

Object Name	Access	Count	Tab Visibility	Layout
CMS 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
<b>Contacts</b>	No Access	30	Tab Hidden	Contact Layout
Content	--	--	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	--
Engagement Channel Types	No Access	7	Tab Hidden	Not Assigned

4. Click on the **Edit** button.

Profile: Thinkific Profile Help for this Page

Find Settings... | Edit Properties

Profile Overview > Object Settings > **Contacts**

**Contacts** Edit

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

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>

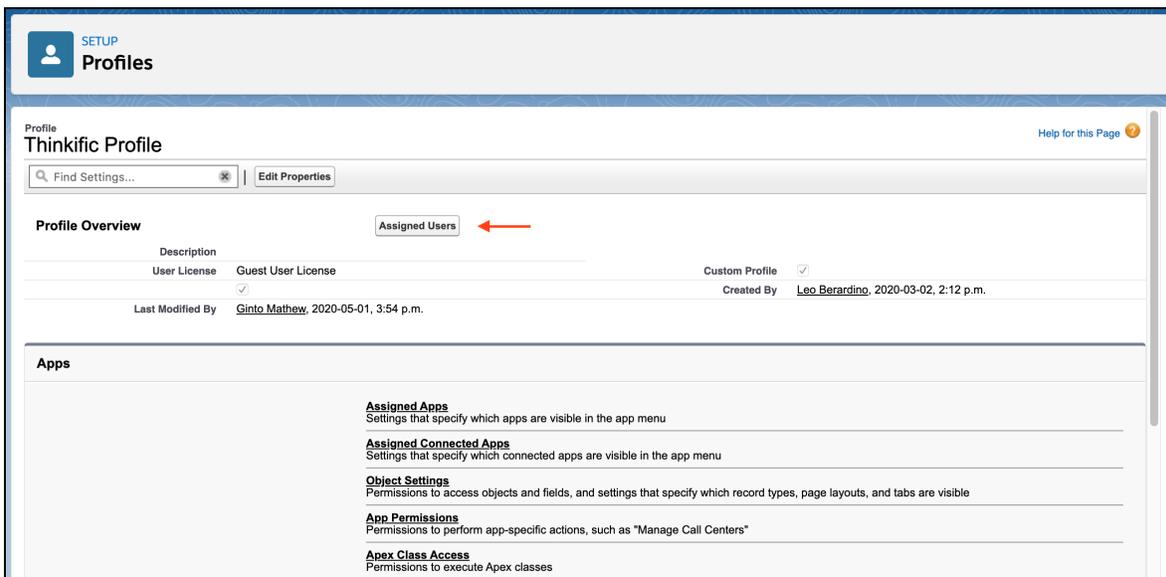
Field Permissions

Field Name	Read Access	Edit Access
Account Name	<input type="checkbox"/>	<input type="checkbox"/>
Assistant	<input type="checkbox"/>	<input type="checkbox"/>
Asst. Phone	<input type="checkbox"/>	<input type="checkbox"/>
Birthdate	<input type="checkbox"/>	<input type="checkbox"/>
Contact Owner	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Created By	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data.com Key	<input type="checkbox"/>	<input type="checkbox"/>
Department	<input type="checkbox"/>	<input type="checkbox"/>
Description	<input type="checkbox"/>	<input type="checkbox"/>
Do Not Call	<input type="checkbox"/>	<input type="checkbox"/>
<b>Email</b>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Email Opt Out	<input type="checkbox"/>	<input type="checkbox"/>

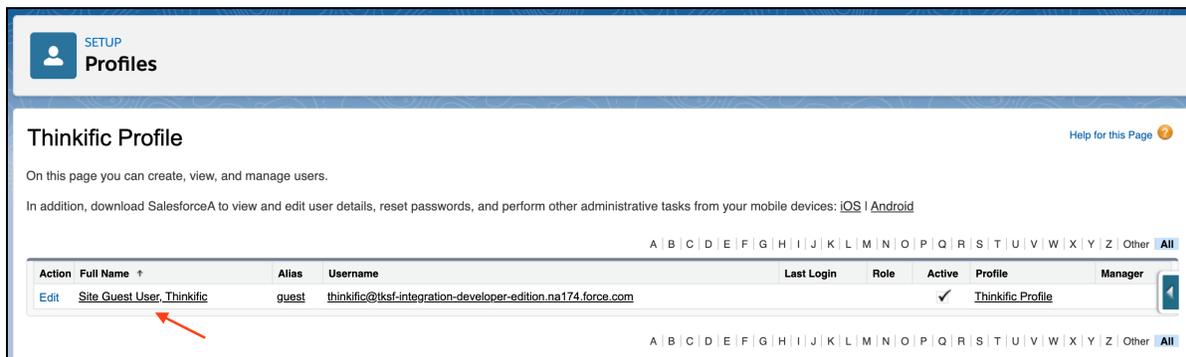
6. After saving the **Contacts** permissions click on **Profile Preview** hyperlink.



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



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



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

**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	Thinkific Profile
Email	leonardo@gscsolutions.com	Active	<input checked="" type="checkbox"/>
Username	thinkific@ksf-integration-developer-edition.na174.force.com	Marketing User	<input type="checkbox"/>
Nickname	Thinkific	Mobile Push Registrations	View
Division		Data.com User Type	
Time Zone	(GMT+00:00) Greenwich Mean Time (GMT)	Mobile User	<input checked="" type="checkbox"/>
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		Used Data Space	10 KB [View]
App Registration: Salesforce Authenticator		Used File Space	0 B [View]
Security Key (U2F)		Individual	
Lightning Login			
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate]		
Created By	Leo Berardino, 2020-03-02, 2:12 p.m.	Modified By	Leo Berardino, 2020-04-06, 5:38 p.m.

[Edit] [Sharing]

**Permission Set Assignments** [Edit Assignments] [Permission Set Assignments Help]

No records to display

- 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 Set Assignments: **Thinkific Site Guest User**

[Save] [Cancel]

Available Permission Sets	Enabled Permission Sets
<ul style="list-style-type: none"> <li>Manufacturing Analytics User</li> <li>Manufacturing Sales Agreements</li> <li>Manufacturing Sales Agreements For Community</li> <li>Sales Cloud User</li> <li>Salesforce CMS Integration Admin</li> <li>Salesforce Console User</li> <li>Service Cloud User</li> <li>Standard Einstein Activity Capture</li> <li>Survey Creator</li> <li><b>Thinkific Connector data access permission</b></li> </ul>	<ul style="list-style-type: none"> <li>None</li> </ul>

[Add] [Remove]

[Save] [Cancel]

**Permission Sets**

Permission Set Assignments: **Thinkific Site Guest User**

[Save] [Cancel]

Available Permission Sets	Enabled Permission Sets
<ul style="list-style-type: none"> <li>Manufacturing Analytics Admin</li> <li>Manufacturing Analytics User</li> <li>Manufacturing Sales Agreements</li> <li>Manufacturing Sales Agreements For Community</li> <li>Sales Cloud User</li> <li>Salesforce CMS Integration Admin</li> <li>Salesforce Console User</li> <li>Service Cloud User</li> <li>Standard Einstein Activity Capture</li> <li>Survey Creator</li> </ul>	<ul style="list-style-type: none"> <li>Thinkific Connector data access permission</li> </ul>

[Add] [Remove]

[Save] [Cancel]

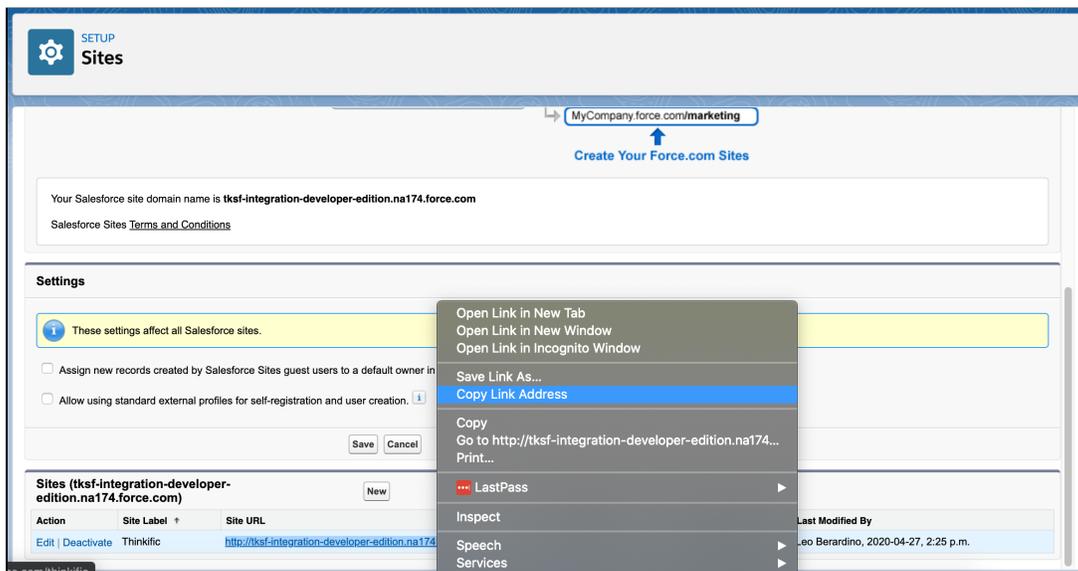
- The new permission set should be shown on the **Permission Set Assignments** section.

**Permission Set Assignments** [Edit Assignments] [Permission Set Assignments Help]

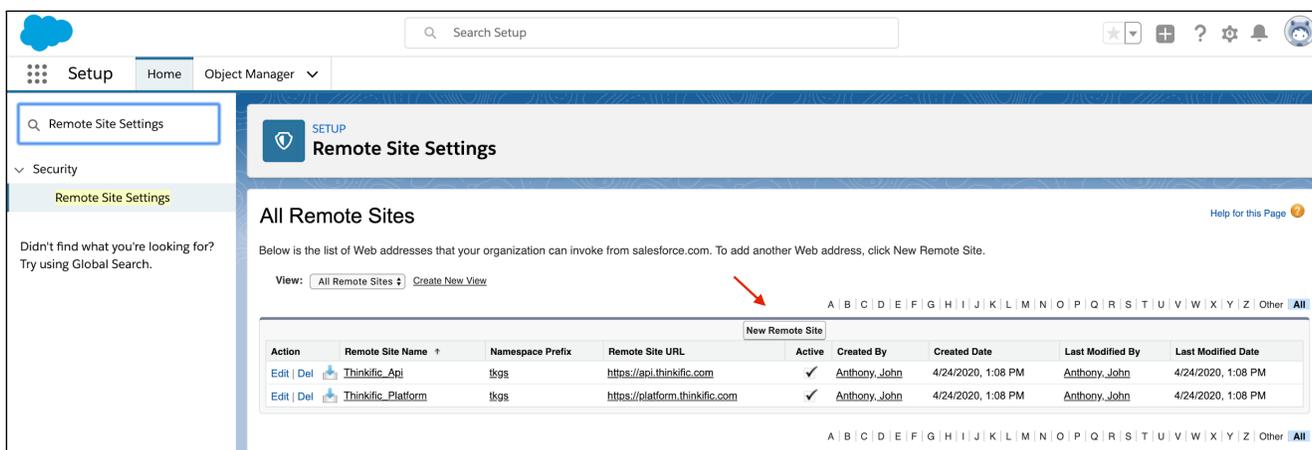
Action	Permission Set Label	Date Assigned
Del	Thinkific Connector data access permission	2020-05-04

## 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.



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



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.

The screenshot shows the 'Remote Site Settings' page in Salesforce. The page title is 'Remote Site Edit'. Below the title, there is a help link 'Help for this Page'. A warning message states: '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.' The form contains the following fields and controls:

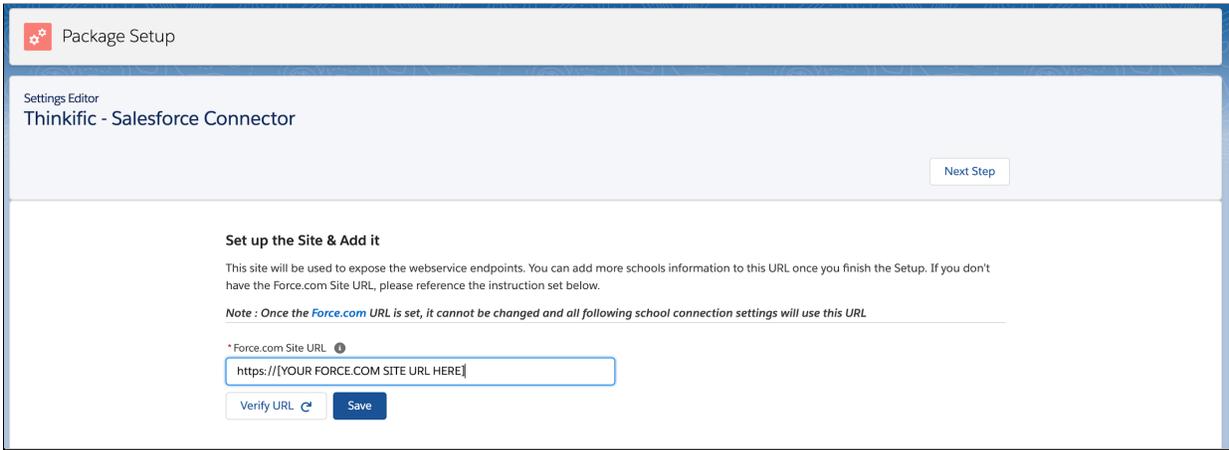
- Remote Site Name:** Text input field containing 'Thinkific\_Site'.
- Remote Site URL:** Text input field containing 'http://[YOUR SITE URL HERE]'. The text is highlighted in blue.
- Disable Protocol Security:** A checkbox that is currently unchecked, with an information icon to its right.
- Description:** A large text area for entering a description.
- Active:** A checkbox that is checked.

At the top and bottom of the form, there are three buttons: 'Save', 'Save & New', and '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.

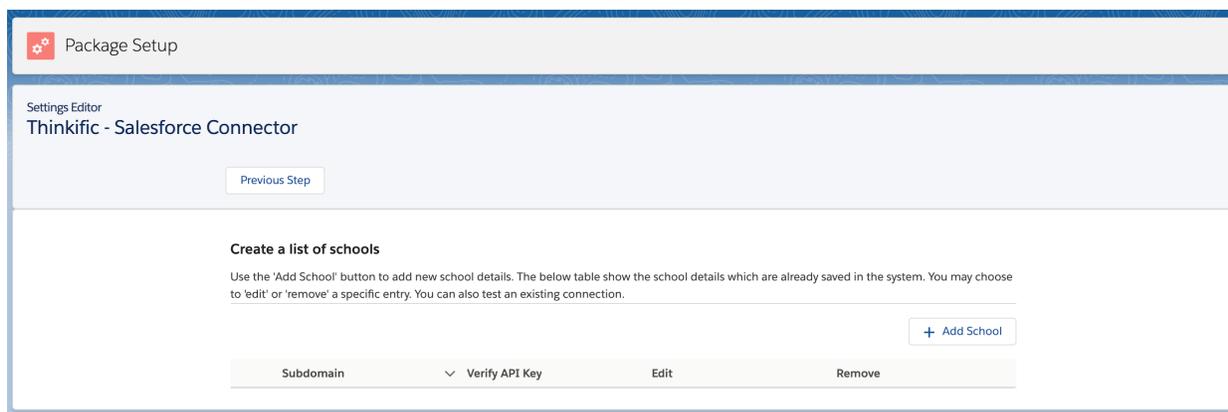


The screenshot shows the 'Package Setup' interface for 'Thinkific - Salesforce Connector'. The page title is 'Settings Editor Thinkific - Salesforce Connector'. A 'Next Step' button is visible in the top right corner. The main content area is titled 'Set up the Site & Add it' and contains the following text: '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.' Below this is a note: 'Note : Once the Force.com URL is set, it cannot be changed and all following school connection settings will use this URL'. A label '\* Force.com Site URL' is followed by an input field containing the placeholder text 'https://[YOUR FORCE.COM SITE URL HERE]'. At the bottom of the input field are two buttons: 'Verify URL' with a checkmark icon and a 'Save' button.

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.

## 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

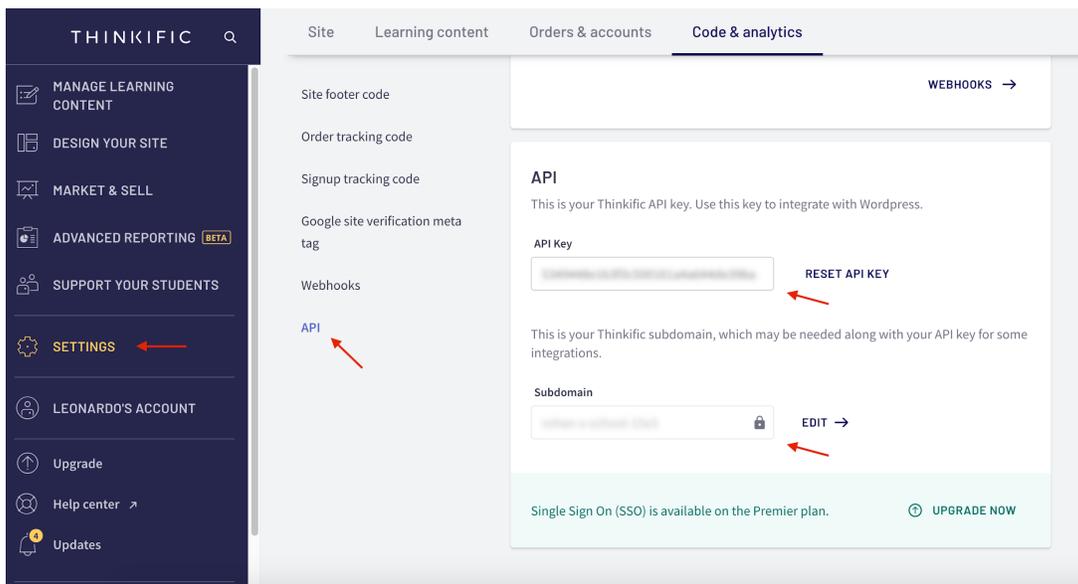
1. Click on the **Add School** button.

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*



- 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.

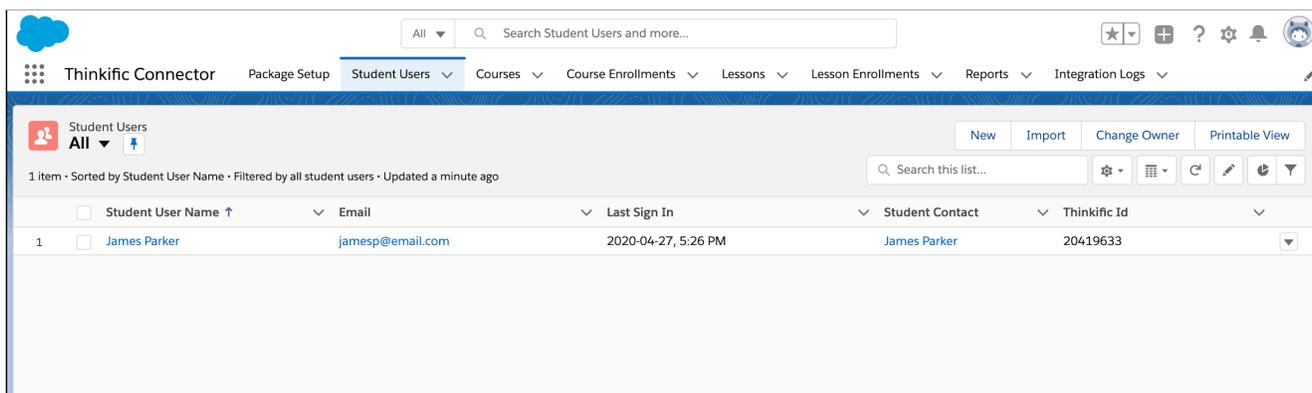
# Thinkific Connector Lightning Application in Details

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.

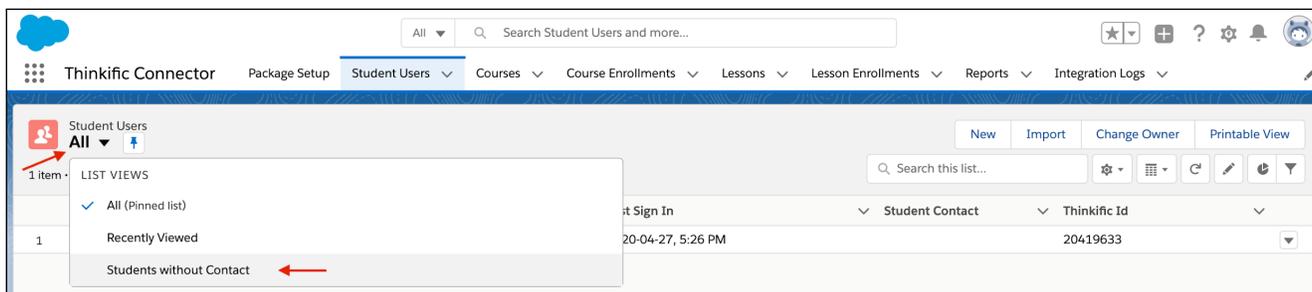


## Linking orphan Student Users with Salesforce Contacts

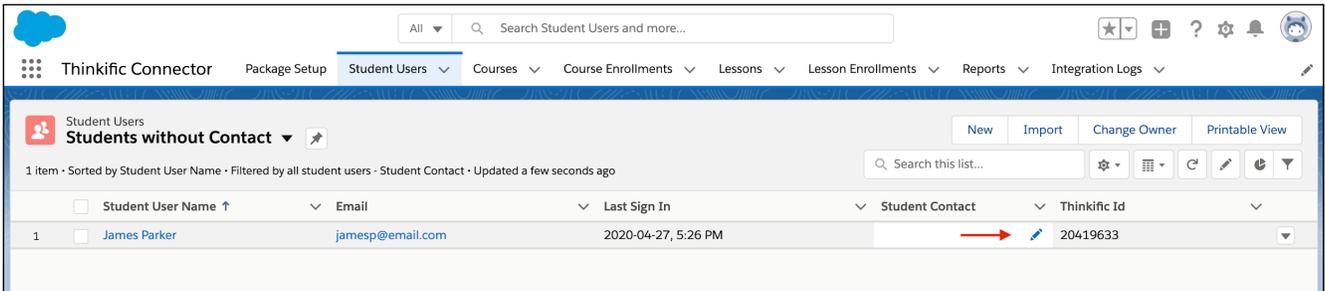
In this tab is also possible to link orphan Student User with Salesforce Contacts.

To link a Student User with a Contact follow instructions:

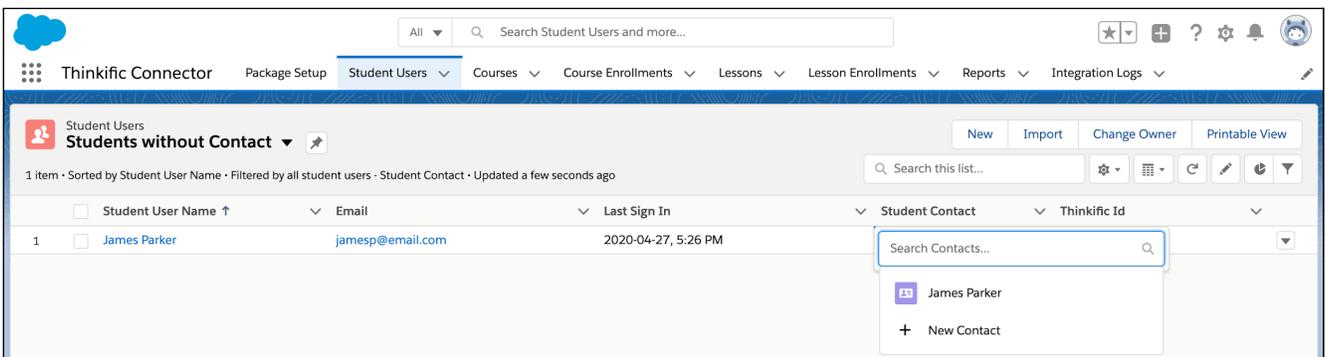
1. Select the *Students without Contact* list view



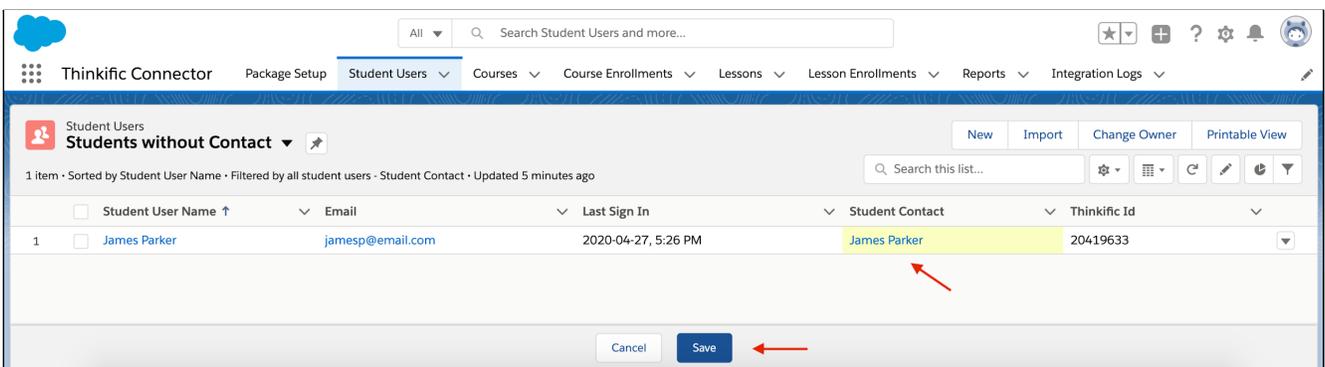
2. Click on the Student Contact edit button



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



4. 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 Name ↑	Site	Slug	Thinkific Id	Owner First Name	Owner Last Name
1	<a href="#">The Thinkific Fast Track Demo</a>	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.

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

## Lessons Tab

Shows the Course Lessons and their type.

The screenshot shows the 'Lessons' tab in the Thinkific interface. It displays a list of 13 lessons for the course 'The Thinkific Fast Track Demo'. The interface includes a search bar, navigation tabs, and a table with columns for Lesson Name, Course, Thinkific Id, Type, Created Date, and Last Modified Date.

Lesson Name	Course	Thinkific Id	Type	Created Date	Last Modified Date
Adding your lessons	The Thinkific Fast Track Demo	10886007	Video	2020-04-27, 5:27 PM	2020-04-27, 5:27 PM
Before you begin...	The Thinkific Fast Track Demo	10885997	Iframe	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
Before you begin...	The Thinkific Fast Track Demo	10885998	Survey	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
Creating your online course	The Thinkific Fast Track Demo	10886006	Video	2020-04-27, 5:27 PM	2020-04-27, 5:27 PM
Get the Fast Track Workbook!	The Thinkific Fast Track Demo	10886002	Download	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
How to use this course	The Thinkific Fast Track Demo	10885995	Lesson	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
How to use this course	The Thinkific Fast Track Demo	10886001	Download	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
Thinkific examples	The Thinkific Fast Track Demo	10885999	HtmlItem	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
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
Welcome to Thinkific	The Thinkific Fast Track Demo	10886004	Video	2020-04-27, 5:27 PM	2020-04-27, 5:27 PM
What is Thinkific?	The Thinkific Fast Track Demo	10885996	Lesson	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
What is Thinkific?	The Thinkific Fast Track Demo	10886000	HtmlItem	2020-04-27, 5:26 PM	2020-04-27, 5:26 PM
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.

The screenshot shows the 'Lesson Enrollments' tab in the Thinkific interface. It displays a list of 4 lesson enrollments that have been completed. The interface includes a search bar, navigation tabs, and a table with columns for Lesson Enrollment Name, Course Enrollment, Created At, Lesson, and Completed.

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

## Integration Logs Tab

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

The screenshot shows the 'Integration Logs' tab in the Thinkific Connector interface. The page title is 'Integration Logs' and it shows 'All Today'. There are 50+ items, sorted by Integration Log Name. The logs are filtered by all integration logs, created date, and updated a few seconds ago. The table below shows the first seven log entries:

ID	Type	ClassName	Method	Message	Created Date	Owner
1	Debug	tkgs.CommunicationService	logHeaders	Header field -> Host: tksf-integration-developer-edition.na174.force....	2020-04-27, 7:02 PM	autoproc
2	Debug	tkgs.CommunicationService	logHeaders	Header field -> X-Salesforce-Forwarded-To: na174.salesforce.com	2020-04-27, 7:02 PM	autoproc
3	Debug	tkgs.CommunicationService	logHeaders	Header field -> X-Salesforce-VIP: FORCE	2020-04-27, 7:02 PM	autoproc
4	Debug	tkgs.CommunicationService	logHeaders	Header field -> X-Salesforce-SIP: 35.174.148.98	2020-04-27, 7:02 PM	autoproc
5	Debug	tkgs.CommunicationService	logHeaders	Header field -> Content-Type: application/json	2020-04-27, 7:02 PM	autoproc
6	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	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.

- 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.

The screenshot shows the Salesforce Setup page for 'Custom Metadata Types'. The search bar contains 'Custom Metadata'. The page title is 'Custom Metadata Types'. Below the title, there is a description of custom metadata types and a table listing them:

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	

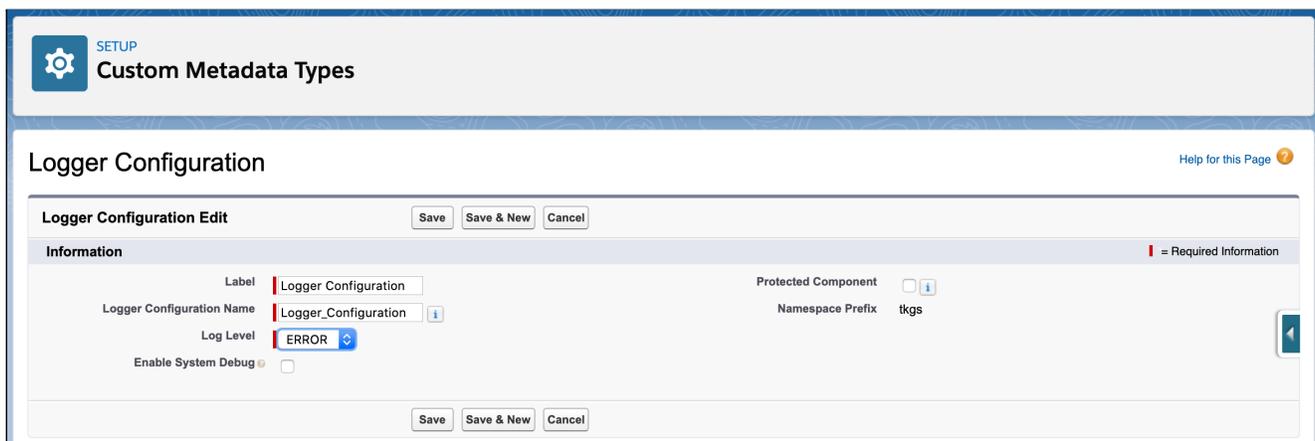
2. Click on the *Logger Configuration Edit* hyperlink.



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.**

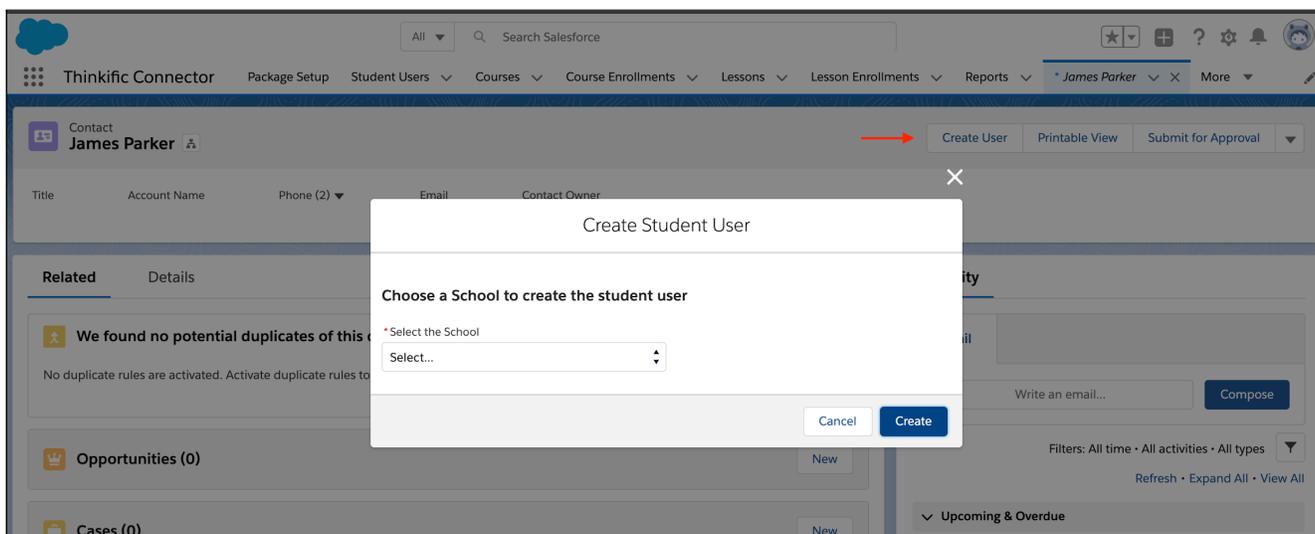


4. Save the Logger Configuration clicking on the Save button.

# Contact Quick Action Button to Create Student User

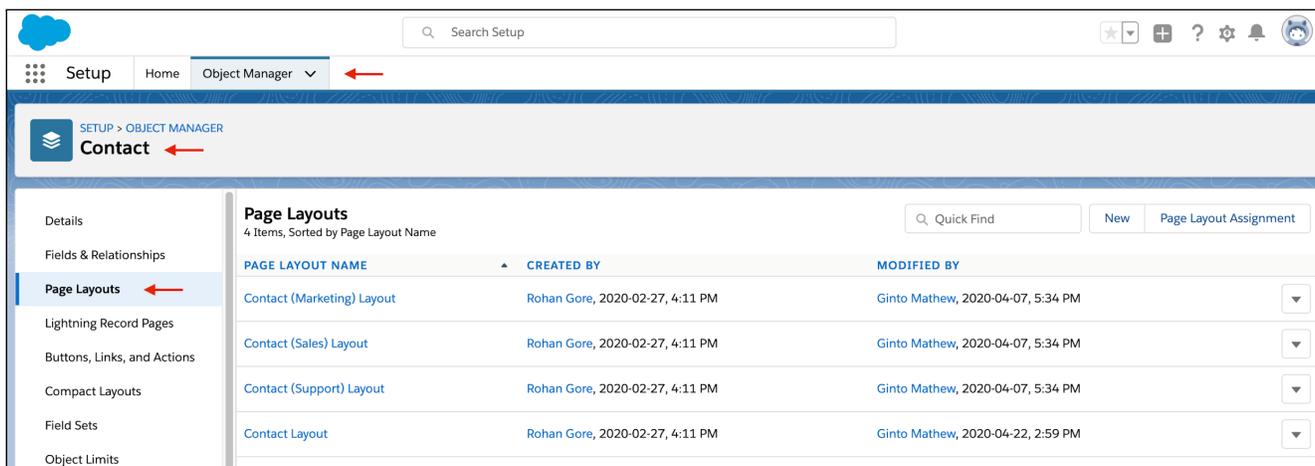
The Contact Quick Action Button allows the Salesforce users to create new Student Users in the connected Schools in Thinkific directly from the Salesforce Org.

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.



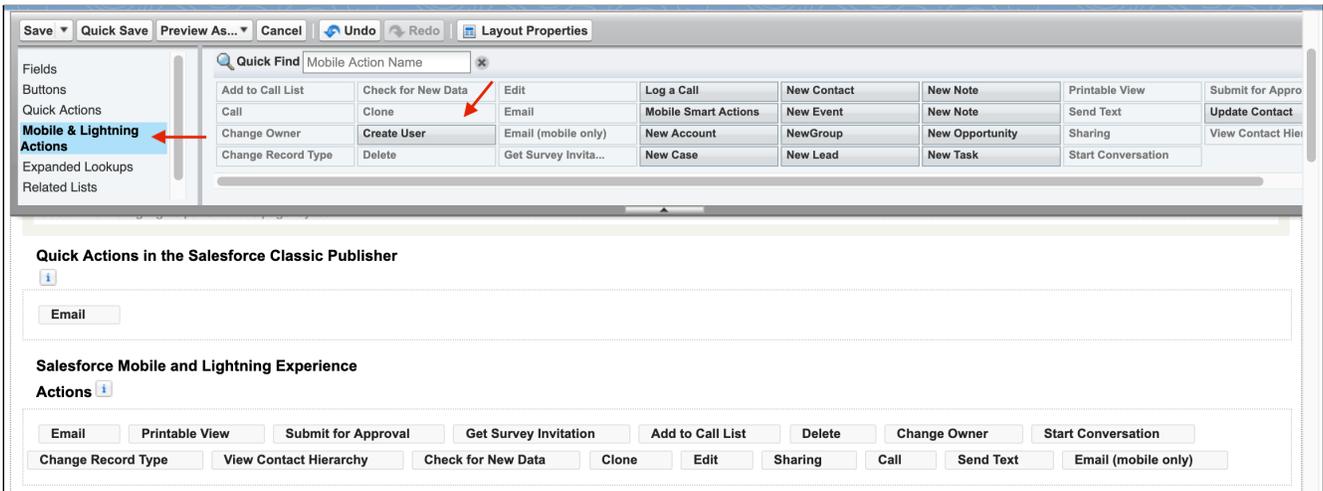
## Adding the Quick Action Button on Contact Record page

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*.

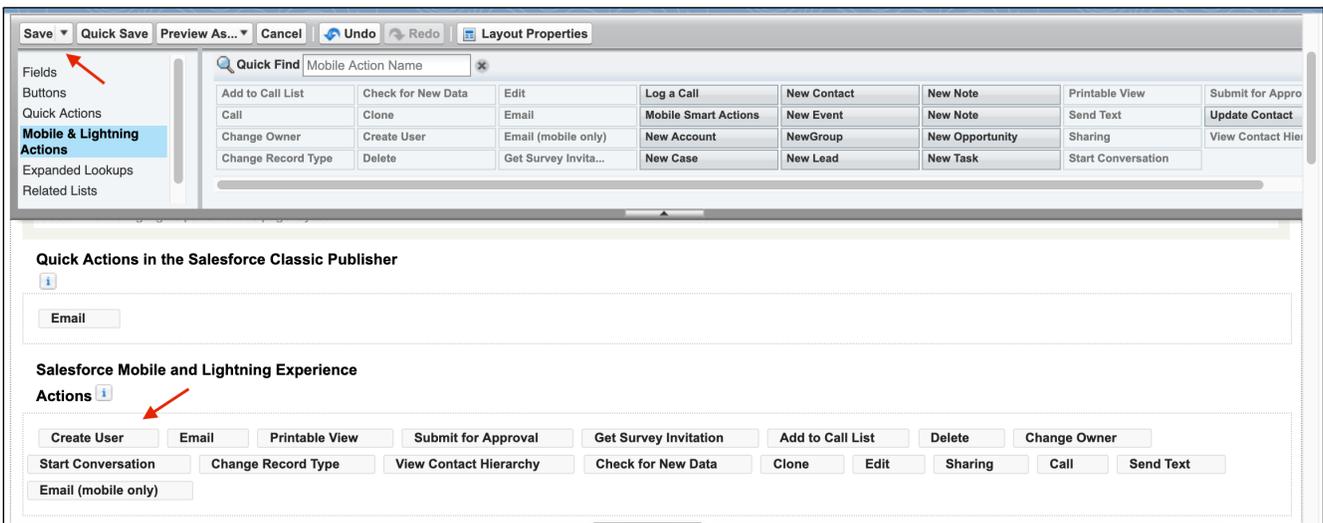


2. Choose the layout to add the Quick Action and edit it.

3. Click on *Mobile & Lightning Actions*.

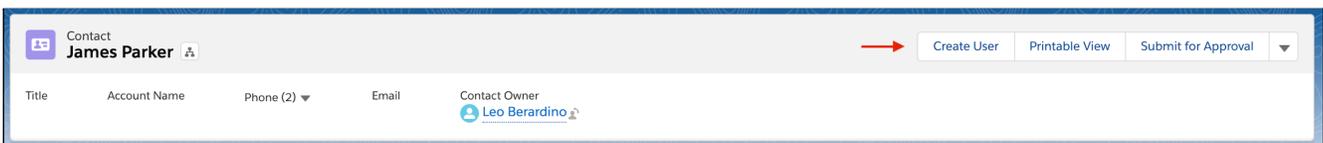


4. Drag the *Create User* quick action button and drop it into the *Salesforce Mobile and Lightning Experience Actions* section.



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 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

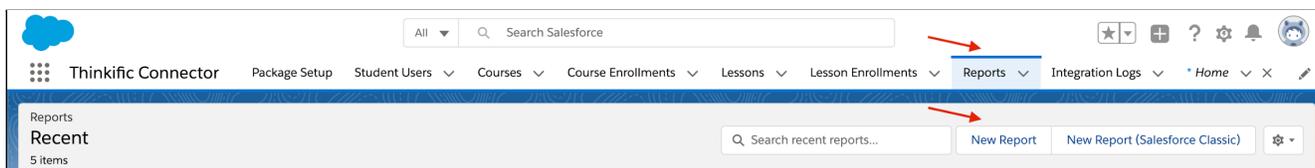
The Thinkific Connector package comes with 13 report types:

- 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

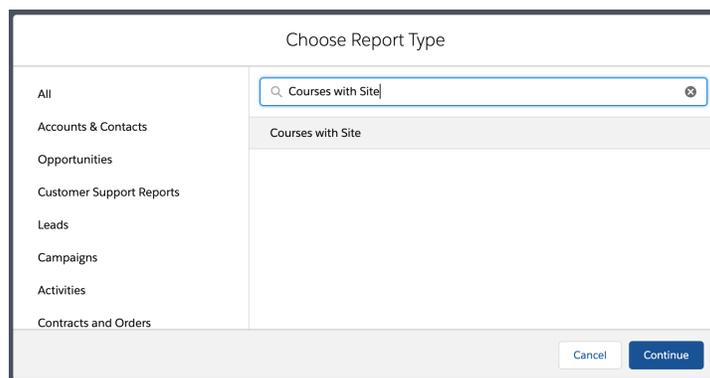
## Creating a report

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

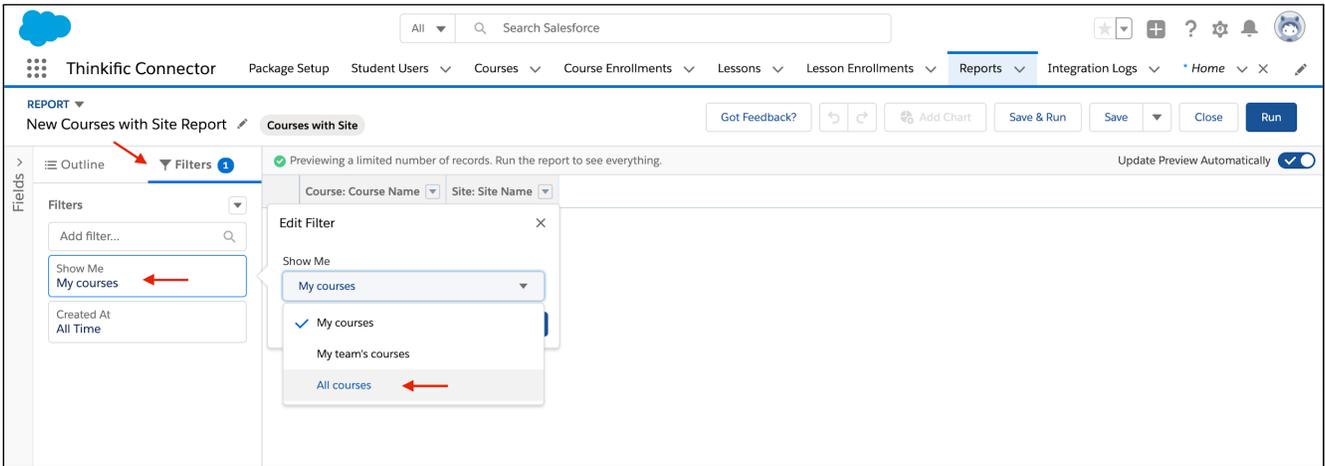
1. Go to the [Thinkific Connector Lightning Application](#) and click on the *Reports* tab then click on *New Report* button.



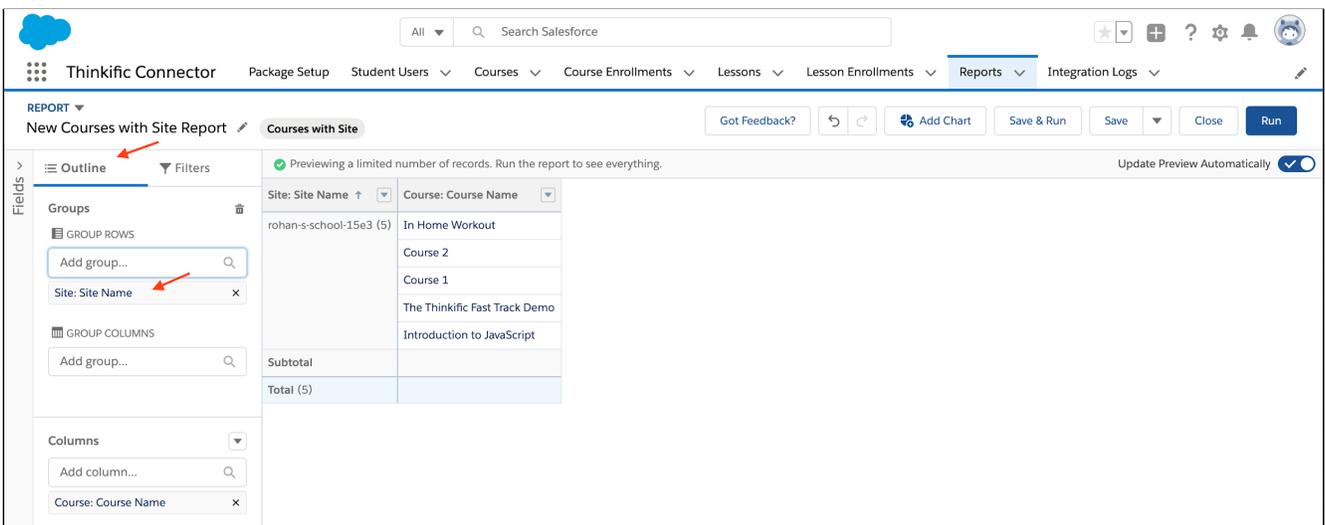
2. Choose the *Course with Site* report type and click on the *Continue* button.



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



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



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

