Getting Started — Administrator Guide

This guide walks a Salesforce administrator through installing OutcomeLens, configuring your org, granting access, and embedding components where your users work.

Audience: Salesforce administrators who will configure the package for their organization. You should be comfortable with Setup, Permission Sets, Lightning App Builder, and Experience Cloud.

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1. Before You Install

Confirm the following before running an install:

- **API-enabled edition** (Enterprise, Unlimited, or equivalent).
- **My Domain** is deployed and active (required for LWC and Experience Cloud).
- **Lightning Web Security** is enabled. Setup → Session Settings → **Use Lightning Web Security for Lightning web components and Aura components**. OutcomeLens uses dynamic LWC imports that are blocked by the legacy Locker Service; install will fail with `LWC1503: Dynamic imports are not allowed` if this setting is off.
- If you plan to use the Experience Cloud renderer, an active site is already provisioned.
- If you intend to link forms to a program object, identify its API name. OutcomeLens defaults to `pmdm__Program__c` (Nonprofit Program Management) but any object can be substituted.

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2. Install the Package

Install OutcomeLens from the AppExchange listing. Choose **Install for Admins Only** during the installer flow. You will grant user access in a later step.

New installs default to a **30-day trial**. Every feature is available during the trial so you can evaluate OutcomeLens end-to-end. At the end of the trial period a full license is required to continue using the product — contact your account representative to purchase and activate.

When the install finishes, OutcomeLens assigns the `OutcomeLens_Admin` permission set to the user who ran the installation. Open the App Launcher and pin the **OutcomeLens** app — the rest of setup happens inside the app.

3. Complete Guided Setup

Open the **OutcomeLens** app and click the **OutcomeLens Home** tab or the **Setup** tab. You will see three guided steps:

1. Assign Permissions
2. Configure Settings
3. Review Email Templates

Each step expands in place and can be marked complete when you finish it.

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4. Assign Permissions

In the Setup tab, open **Assign Permissions**. Grant each of your team members one of three permission sets:

Permission Set	Who It's For
OutcomeLens Admin	Admins who configure templates, categories, and org settings
OutcomeLens User	Program staff who build templates, send forms, and view outcomes
OutcomeLens Guest User	Experience Cloud guest profile for external respondents

To assign:

1. Choose the permission set from the dropdown.
2. Search for users by name or email.
3. Select one or more users from the results.
4. Click **Assign**.

To review or remove existing assignments, click **View Assignments**.

Mark the step complete when you're done.

> Standard fields on standard objects (for example, `Contact.Email`) cannot be granted through a permission set. Verify that assigned users have the expected access on standard objects at the

> profile or object-permission level.

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5. Configure Settings

Still in the Setup tab, open **Configure Settings**. The form is grouped into six sections. Review each one and save.

Experience Cloud

- **Base URL** — the URL of your experience cloud site page where the OutcomeLens Form Renderer will be displayed.

Required if you plan to invite external respondents through email links.

Data Model

- **Program Object API Name** — the object that represents a program (for example, `Account` or `pmdm__Program__c`). Used to group participants in Program Reporting and the Program Dashboard.
- **Enrollment Object API Name** — the junction object that links contacts to programs (for example, `pmdm__ProgramEngagement__c` for NPSP).
- **Enrollment Contact Field** — the lookup on the Enrollment object that points to the Contact.
- **Enrollment Program Field** — the lookup on the Enrollment object that points to the Program.
- **Cohort Object API Name** — the object used to group participants into cohorts (for example, `Campaign`). Leave blank to hide cohort selection from Form Assigner and Bulk Assignment.

Email

- **Org-Wide Email Address** — the verified address invitations are sent from. Leave blank to use the running user's default address.
- **Daily Email Budget** — maximum invitation and reminder emails OutcomeLens will send per day. Keep this below the Salesforce 5,000-per-day org limit so other processes can still send.

Branding

- **Default Theme Color** — the accent color applied to new templates. Use the color picker or paste a hex value. This color is also used by the Form Renderer when no Experience Cloud theme is inherited.

Timing

- **Reminder Days** — days before the due date to send a reminder. Set to 0 to disable reminders.
- **Token Expiry** — days until an invitation link expires.
- **Dropout Window** — days of inactivity before a participant is flagged as a dropout in Program Reporting.
- **Overdue Grace** — days past the due date before a form is marked Overdue.

Snapshots

- **Snapshot Frequency** — how often the scheduled batch captures aggregate outcome data for trend charts. Changes take effect on the next scheduled run.

Click **Save Settings**, then mark the step complete.

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6. Review Email Templates

Open **Review Email Templates** in the Setup tab. Four templates ship with the package:

- **Invitation** — sent when a form is assigned.
- **Reminder** — sent ahead of the due date based on Reminder Days.
- **Overdue Notice** — sent after the due date plus the Overdue Grace period.
- **Completion Notification** — sent after submission.

Select a template to review the subject and body. Edit the copy to match your organization's voice, then click **Save Template**. Merge fields resolve to participant, form, and program data when the message is sent.

Mark the step complete when each template reads the way you want it to.

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7. Embed OutcomeLens Components

OutcomeLens components appear in the Lightning App Builder component palette under **Custom — Managed**.

On Record Pages

Component	Best Placed On	What It Does
Form Launcher	Contact or Lead record page	Launch forms directly from a the current record
Program Snapshot Chart	Program record page	Category trend chart scoped to this program

To embed a component: open the record page in Lightning App Builder, drag the component onto the page, save, and activate.

Custom Actions

OutcomeLens ships with three quick actions that you can add to record page layouts or the highlights panel. These give your users a one-click way to launch common workflows without leaving the record they're working on.

Action	Available On	What It Does
Assign Form	Contact	Open a modal to assign a form to this contact
Assign Form	Lead	Open a modal to assign a form to this lead
Send Invitation	Form	Send (or resend) the invitation email for this form

To add an action to a record page:

1. Open the object in **Setup → Object Manager**.
2. Open **Page Layouts** and select the layout you want to edit.
3. From the palette, drag **Assign Form** (or **Send Invitation**) into the **Salesforce Mobile and Lightning Experience Actions** section.
4. Save the layout.

The action appears in the highlights panel on the record page.

In Screen Flows

- **Form Renderer** — full form fill surface for internal users.
- **OutcomeLens Question** — a single question, identified by Unique Name. Use this when a Flow should ask one targeted question.

Drop either component onto a Flow screen and map the inputs.

In Experience Cloud

The **Form Renderer** is the component designed for external respondents.

1. Open your site in Experience Builder.
2. Create or open the page that will host the form.
3. Drag **Form Renderer** onto the page.
4. In the page's URL parameters, add the following values:
   - `{!formTemplateId}`
   - `{!token}`
5. Publish.

External respondents arrive via tokenized invitation links generated by OutcomeLens. The Form Renderer reads the `formTemplateId` and `token` URL parameters to load the right form for the right participant.

Branding the external form: if your site uses a DXP theme, the Form Renderer inherits your site's fonts, text colors, and brand color automatically. If you are not using DXP theming, set the brand color in **OutcomeLens → Setup → Configure Settings → Branding**, or adjust it per template inside the **Studio**.

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8. Finish Setup and Install Sample Templates

Return to the Setup tab and confirm all three steps are marked complete. Once the checklist is done, the **OutcomeLens → Home** tab replaces the setup wizard with the main home page.

From Home you can install **sample templates** — pre-built Form Definitions and Scoring Categories based on common instruments (PHQ-9, GAD-7, housing stability, education outcomes). Installing sample templates is the fastest way to see a complete data flow in your own org. They are safe to modify, rename, or delete at any time.

Your program staff can now open the Studio and start building.

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9. Get Help

- **Email**: info@majors-consulting.com
- **Documentation**: https://majors-consulting.com/documentation

Reach out anytime. We read every message.