

Attendance Tracker Customization Guide

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Introduction:

This FAQ is divided into 3 parts: how to use attendance tracker, how to customize attendance tracker, and future of attendance tracker.

For the most part attendance tracker is just like any other salesforce app, but some of you may be unfamiliar with how to customize salesforce so this document will go over some common request. If a lot of the stuff in this doc is new to you then you may need training on salesforce, as this app is mostly just salesforce customizations.

The visual force page and trigger are 2 areas that are not customizable. If you need major changes and have the budget for it a custom solution can be done and we can discuss this more later. There are future changes planned and I'm open to suggestions, however, new features must be useful to all users for me to add them to this app. Remember this app is designed to be used in a variety of organizations, and flexible enough to be combined with other applications.

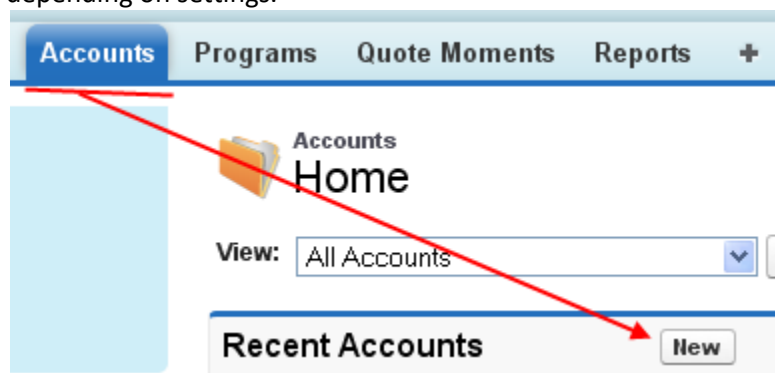
How to use:

Our tutorial screen shot are taken in Classic, since Lightning still does not have all the features of classic built yet & salesforce keeps rearranging the menu to confuse us all. You'll be able to search in Lightning for the features listed or switch back to classic if you want an easier time finding stuff. Lightning is just a different front end and our app does work in lightning.

Add contacts

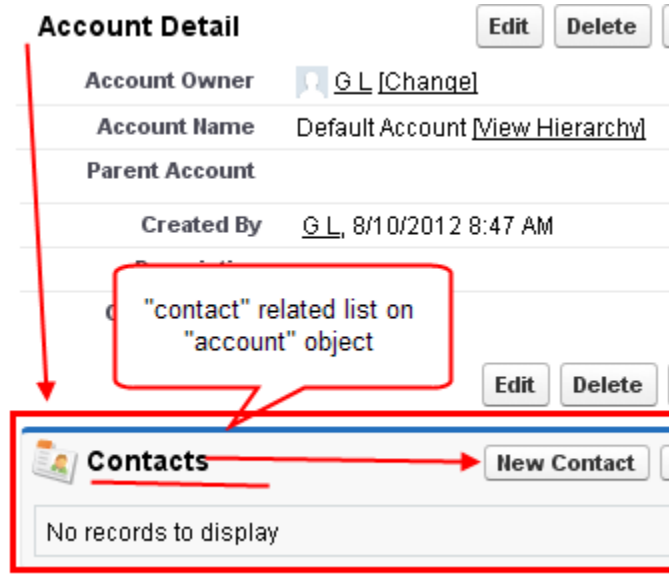
Adding contacts is no different than adding a contact in salesforce. If you are not on the non-profit edition then you will need to add an account to your contacts, as the non profit edition does this automatically depending on your settings. Recall that a contact without an account is private. You may also notice that the contacts have record types, which for the most part have no effect on anything, but were requested by early investors in this app. You have the option of turning them off or updating your existing contact which is discussed in the "set up customize section of this document under "Record types". The same is true for fields

To add an account, click on the account tab and then click new. Then fill out the details and click "save". If using the nonprofit edition app then this may be automatically done when you add a contact depending on settings.



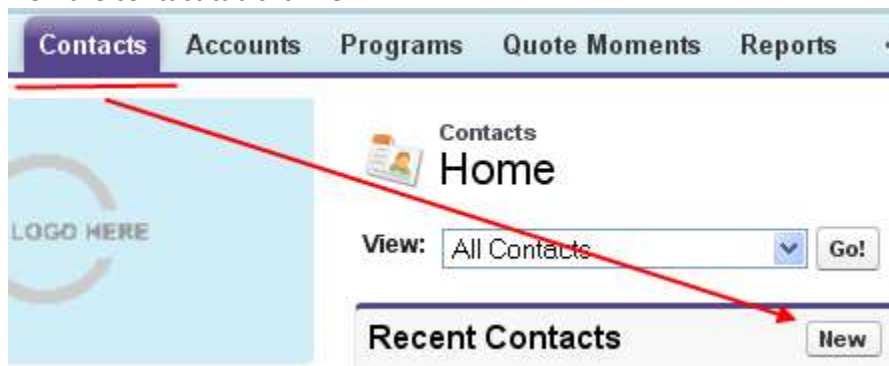
To add a contact there are 2 options:

1 From the account you just added, find the related list for “contact” and click “new”.



Select a record type if you didn't disable them, and fill in the remaining details on the next page and click save when done.

2 On the contact tab click new.



Select a record type if you didn't disable them.



New Contact

Select Contact Record Type

Select a record type for the new contact. To skip this page in the setup page.

Select Contact Record Type

Record Type of new record: Student

Continue Cancel

If not using the nonprofit edition app that auto adds the account, then use the look up field to add find and add account.

Contact Edit Save Save & New Cancel

Contact Information

Contact Owner: G L

First Name: -None-

Last Name:

Account Name: 

Birthdate:

Gender: -None-

Ethnicity: -None-

Address Information

Mailing Street:

Lookup

Search: Go! New

You can use "*" as a wildcard next to other c

Recently Viewed Accounts

Account Name	Acc
Aethna Home Products	
Default Account	

Add programs

Click on the program tab and then click "new".

Programs Quote Moments Reports +

Programs Home

View: All Go! Edit | C

Recent Programs New

Program Edit Help for tr

New Program

Program Edit Save Save & New Cancel

Information = Required In

Program Name	Test program	Owner	G L
Program Type	CAMP	Start Date	8/10/2012 [8/10/2012]
other program type		End Date	11/9/2012 [8/10/2012]
Program Year	2012		
Program Season	-None-		
Program Site	-None-		
other program site			

Add enrollments (link Contacts to Programs)

You must have first added the contacts and programs you want to link up.

There are 2 ways to add enrollments:

1 Click "new" from the "enrollments" related list on "programs".

Enrollments New Enrollment

No records to display

Then use the "contacts" look up to find the "contacts" you want to enroll in the "programs".

2 Click "new" from the "enrollments" related list on "contacts".

Enrollments New Enrollment

No records to display

Then use the "programs" look up to find the "programs" you want to enroll the "contacts" in.

Enrollment Edit Save Save & New

Information

Program

Youth

Save Save & New

Search ~ salesforce.com

https://na9.salesforce.com/_ui

Lookup

Search

You can use "*" as a wild

Recently Viewed Contact

Name

[Bart Simpson](#)

[Chris Griffin](#)

It recommended to use the related list on programs, you can make use of the “save and new” button on the enrollments to quickly add the next contact.

Enrollment Edit Save Save & New Cancel

Information

Program

Youth

Save Save & New Cancel

Add sessions and system will add attendances for each contact in the program

Adding an enrollment for each contact in a program may seem time consuming, but after doing this the system will be able to add the attendances to save huge amounts of time. This system is best used when you have to track daily attendance over the several months, not when just want to track one day.

Sessions are best used for daily attendance, in which case you create 1 attendance for each day you want to track.

To add a “session”, find the related list on “program” and click “new”.

Enrollments New Enrollment		
Action	Enrollment: Enrollment Name	Last Name
Del	e00000	Simpson
Del	e00001	Griffin
Del	e00002	Cartman
Del	e00003	Simpson
Del	e00004	Griffin
Show 1 more » Go to list (6) »		

Sessions New Session	
-----------------------------------	--

Make sure the “session date” field is filled in as this is used by the trigger to populate the attendance date. Then click save.

Next look at the “attendance” related list on “session”, to see the attendances where created automatically by the system.

Session Detail
Edit Delete Clone

Session Name	s00000	Session Date	8/10/2012
Program	Test program		
Injuries			
Major			
Conflicts/Issues			

Attendance calcs

Attendance Total Present	0	AttendanceTotal Not Present	6.00
Attendance Total Possible	6	Session Attendance	0%
Created By	G L , 8/10/2012 1:35 PM	Last Modified By	G L , 8/10/2012 1:35 PM

Edit Delete Clone

Attendances Update

attendance that were auto created by saving the session with a session date

Action	Attendance: Attendance Name	Attendance date	Present	Excused Absence	Excuse Details	Last Name
Edit Del	a00000	8/10/2012	☐	☐		Simpson
Edit Del	a00001	8/10/2012	☐	☐		Griffin
Edit Del	a00002	8/10/2012	☐	☐		Cartman
Edit Del	a00003	8/10/2012	☐	☐		Simpson
Edit Del	a00004	8/10/2012	☐	☐		Griffin
Show 1 more » Go to list (6) »						

Chat

However, they can also be used for classes in a day. In this case you may add a pick list or look up field to the session to separate on reports. This only works if all the classes are in the same program. So this may work for first grade, but not in high school where they switch classes.

Update attendance

Click the “update” button on the “attendance” related list on “session”, to get the update page. (In versions before 1.7, you got a pop window in some browsers caused an error. There was bug fix for this in the details tab under customization guides on the app exchange listing, which you undue after upgrading if you used the fix.

<https://appexchange.salesforce.com/listingDetail?listingId=a0N30000005uqk2EAA>)

Attendances			
			Update
Action	Attendance: Attendance Name	Attendance date	Present
Edit Del	a00000	8/10/2012	☐
Edit Del	a00001	8/10/2012	☐
Edit Del	a00002	8/10/2012	☐
Edit Del	a00003	8/10/2012	☐
Edit Del	a00004	8/10/2012	☐
Show 1 more » Go to list (6) »			

2 edit/ update the attendance info.

3 Optionally use the Next button to get to more records

4 Click save when done

5 Click on session to leave the update page and return the session.

Attendance List					
			Save	Cancel	
		Next			
Attendance Name	Youth	Session	Present	Excused Absence	Excuse Details
a00825	Geoff Minor	s00705	☒	☐	
a00826	Carole White	s00705	☒	☐	
a00827	Jon Amos	s00705	☒	☐	

Roll up fields

Now that attendances have been added, you can see the following rollup total metrics. Hover the mouse over the orange question mark in the app to find more detailed explanation of each one.

On programs:

▼ Program Totals

Total Youth Enrolled 2 6

total Session 2
Attendances

Total Session Days 1

Average Program 33%
attendance

On Sessions:

▼ Attendance calcs

Attendance Total 2
Present

AttendanceTotal Not 4.00
Present

Attendance Total 6
Possible

Session Attendance 33%

Projects

A program may have many projects, or lesson plans.

Add a project by going to the "project" related list on the "program".

Projects 			
New Project			
Action	Projects Name	Project Type	Date of Project Completion
Edit Del	Public Education Projects	Outreach	8/24/2012
Edit Del	C-SAPs	Social Service	8/10/2012

Quote able moments

These are used for capturing quotes that contacts may say while in the program. This can be thought of as testimonials or students showing they learned the lessons of the program. For example some one that read this document may say they like attendance tracker because it saves them the time of adding attendances. If someone went to church they may state how the verse fits their own like with an example. Student may show they learn about helping by explaining the lesson to another student.

Quotes can be added from a related list on either a program or a contact.

They can also be added from the quote moments tab.

Quote Moment Edit

New Quote Moment

Quote Moment Edit

SaveSave & NewCancel

Information

Quote NameReport lesson

Date8/10/2012

Person QuotedBart Simpson

ProgramTest program

QuoteI see all green in my dashboards, that how I know my company is doing good. Green is good.

Feedback forms

The idea is you would distribute forms to get feedback from those involved in the program. This feature was designed so question could be created on the fly.

You add feedback questions and results on the related list on programs.

Feedback Form Edit

SaveSave & NewCancel

Information

ProgramTest program

Form TypeYouth Feedback Form

QuestionYou learned something?

Significantly Agree2

Agree2

Neutral1

Disagree3

Significantly Disagree0

Number who answered question8

filter for reports

question asked

Total for each answer after you collect back the forms

some may have left the question blank

▼ End of Season Feedback from Forms Outcomes

Family Feedback
Forms Collected

Youth Feedback  8 
Forms Collected

Partner Feedback 
Forms Collected

Created By Your User Name, 8/10/2012 10:53 AM

Last Modified By Your User Name, 8/10/2012 1:50 PM

Feedback Forms

[Feedback Forms Help](#) 

Action	Question	Question	Form Type	Significantly Agree	Agree	Neutral	Disagree	Significantly Disagree
Edit Del	QC00000	You learned something?	Youth Feedback Form	2	2	1	3	0
Edit Del	QC00001	Cats are cute	Youth Feedback Form	3	0	2	1	0
Edit Del	QC00002	cloud is useful	Youth Feedback Form	3	0	0	0	0

Set up / customize:

Adding fields to an object (contacts, enrollments, programs, sessions, etc)

Adding / removing a field to a layout:

You may need to add more fields or remove extra field to use this app. You do this the same as you would in salesforce.



App Setup

Customize

Create

- Apps
- Custom Labels
- Interaction Log Layouts
- Objects**
- Packages
- Report Types
- Tabs

Workflow & Approvals

Custom Fields & Relationships

New Field

Action	Label	Installed Package
Edit	Attendance	YAT
Edit	Enrollment	YAT
Edit	Feedback Form	YAT
Edit	Program	YAT
Edit	Project	YAT
Edit	Quote Moment	YAT
Edit	Session	YAT

Action	Field Label	API Name
Edit	Attendance date	yat__date__c
Edit	Excused Absence	yat__Excused_Absence__c

Changing a picklist

Yes, you can change the value of a picklist in an app. The same way you change it for any other field. In setup, find an click on the field you want to change and edit its values.

Picklist Values

New Reorder Replace Pr

Chart Colors

Action	Values	Default	Chart Colors
Edit Del	Beautification	☐	Assigned dynamically
Edit Del	Clean-Up	☐	Assigned dynamically
Edit Del	Advocacy	☐	Assigned dynamically

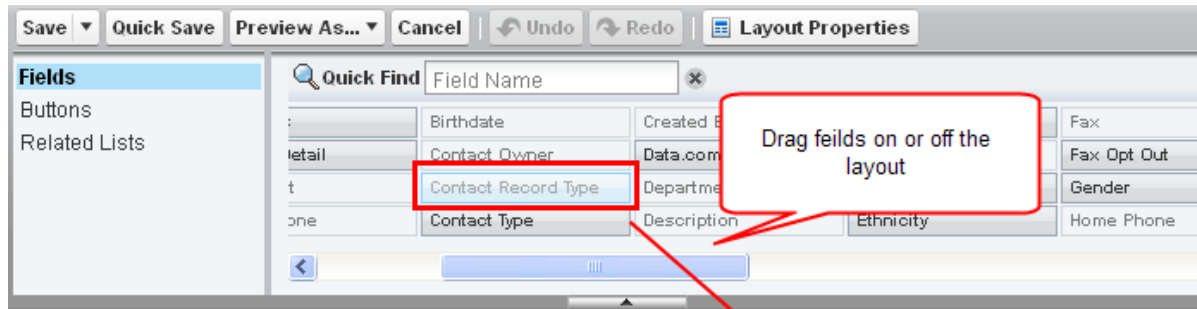
Changing a record type:

Record type and page layouts don't affect the triggers or visual force pages.

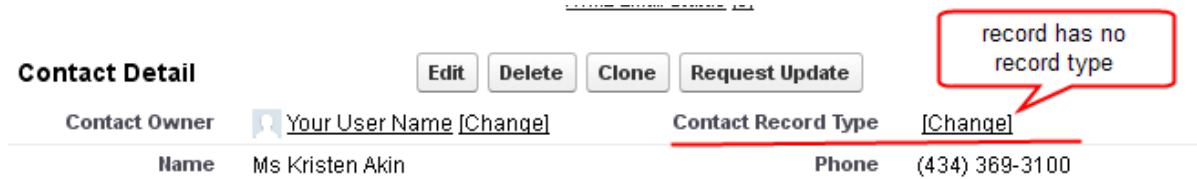
You may have existing contact and want to use record types.

You many need to add the record type field as it necessary to change the record type.

This also where you can remove fields form a layout.



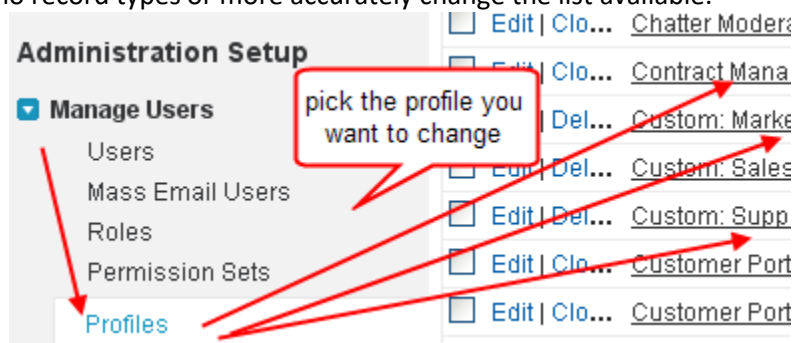
Then click save.



Click "change" to change the record type and just follow the wizard.

Hiding a record type:

To use no record types or more accurately change the list available.



Record Type Settings	
Standard Record Type Settings	
Accounts	
Campaigns	
Campaign Members	
Cases	
Contacts	Family (Default), Partner-Individual, Staff, Student, Volunteer, Youth [Edit]
Content	
Contracts	
Custom Record Type Settings	
Attendances	

Selected Record Types

Select the record types for this user profile. You need to add display it on record detail and edit pages.

Available Record Types

- Family
- Partner-Individual
- Staff
- Student
- Volunteer
- Youth

Selected Record Types

- Master-

Add

Remove

Set up like above, where “-Master-” is the default NO record type. Note this does not affect existing records.

Manually add attendances button

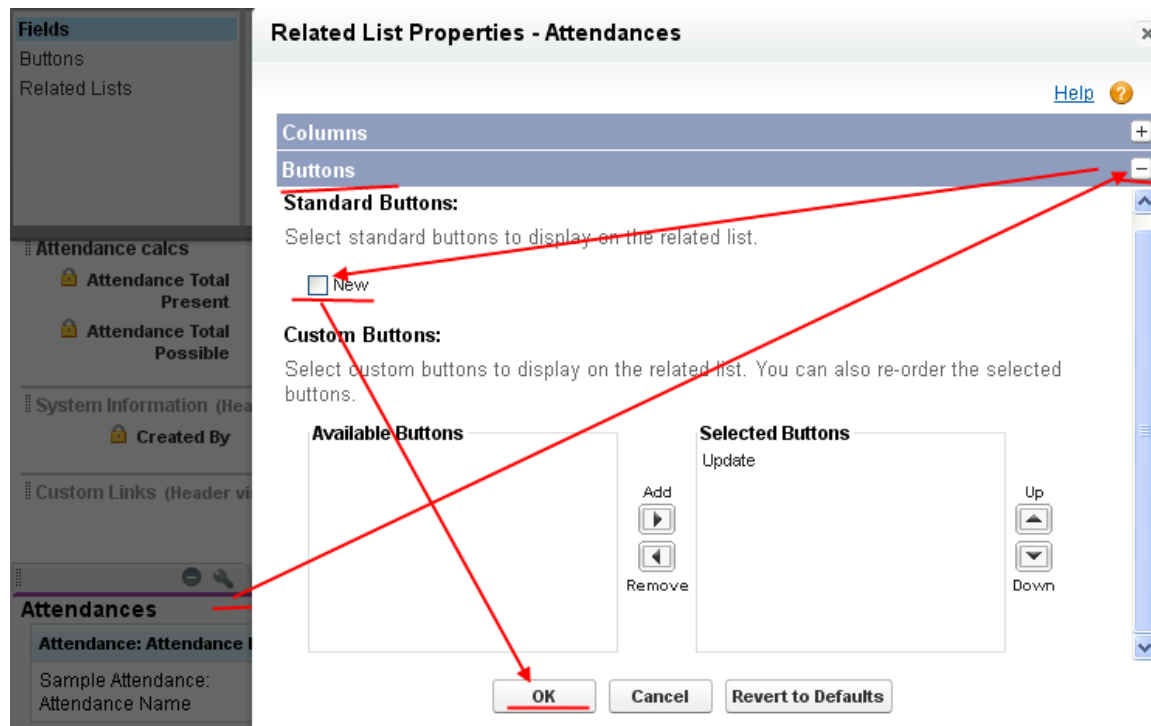
Sometimes you forget to enroll a contact in a program until after you add a session. In this case there is a manual way to add attendance; similar to adding a session, but first you need to put the new button on for attendance on the related list for a “session”.



On a session, edit the layout

[Customize Page](#) | [Edit Layout](#) | [Printable](#)

On the related “attendance” check the “new” button box and save.



Now you have manual way to add attendance to a session.

New Customization for Version 1.7:

Setting up user licenses

In an effort to make the pricing more economical and fair we will be offering a per user model. Those of you on the old model of a whole org have the option of switching to this new model or keeping the old model. With the old model you will not need to set licenses as the old model is for the entire org. Only with the new model will you need to do this extra step to enable the users to use the Attendance Tracker App. This in addition to basic permission set up like role, profiles which are not covered in this manual.

In Setup

Under App Setup – Installed Packages

Click “Manage Licenses” for Package “YAT” to get the Licenses Users page

My Chatter Settings

App Setup

Customize

Create

Develop

Deploy

Schema Builder

Canvas App Previewer

Installed Packages

AppExchange Marketplace

Installed Packages

Action	Package Name	Publisher	V
Uninstall	Salesforce for Google AdWords	SFGA Build	1
Description Salesforce for Google AdWo generation activity....			
Uninstall Manage Licenses	YAT	ES	1
Description Attendance Tracking			

To add a user

Click add user

Package Name	YAT	Publisher	ES
Status	Active	Allowed Licenses	2
Expiration Date	11/21/2013	Used Licenses	1

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T |

Licensed Users				
Add Users Remove Multiple Users				
Action	Full Name ↑	Role	Active	Profile
Remove	Stephenson, Eric		☒	System Administrator

Select the users or user you want to add, then click Add button

View: All Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M

Available Users

Select Shown

Deselect Shown

Deselect All

Add All Users

Action	Full Name ↑	Role	Active
☒	Stephenson, Eric		☒

Selected Users

Action	Full Name
☒	Stephenson, Eric

Add

Cancel

To remove a user

Click remove button for the user you want to remove

Package Name	YAT	Publisher	ES
Status	Active	Allowed Licenses	2
Expiration Date	11/21/2013	Used Licenses	1

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T |

Licensed Users				
		Add Users	Remove Multiple Users	
Action	Full Name ↑	Role	Active	Profile
Remove	Stephenson, Eric		✓	System Administrator

Adding a Site (external website User)

UPDATE/Warning – Salesforce has released a new security update in 2020 that may break an external site. Site users can no longer view all records which sharing rules may allow sharing records with the site user. There are several other security enhancements which are basically done to increase sale of community licenses.

Before Site.com there was Sites. Enterprise editions and up can have client facing websites using visual force. Since most of our users don't know how to write visual force, we are working on Visual Flow extension package that you can use and modify to allow external users to sign up and enroll in programs. However, to use Attendance tracker on a site does require a full user license.

Once you've created a site you can add a attendance tracker license to the site.

Under set up

Develop – Sites – <Site Label>

Customize

Create

Develop

Apex Classes

Apex Triggers

Apex Test Execution

API

Components

Custom Settings

Email Services

Pages

Sites

Your Force.com domain name is **speakerdb-developer-edition**

Force.com Sites [Terms and Conditions](#)

Sites (speakerdb-developer-edition.na15.force.com) New

Action	Site Label ↑	Site URL
Edit Deactivate	speaker	http://speakerdb-developer-edition.na15.force.com/

« [Back to List: Sites](#)

Site Detail

Site Label speaker

Edit

Public Access Settings

Login Settings

Site Name

Profile Detail

Edit

View Users

Name speaker Profile

speaker Profile

A | B

☐ Action	Full Name ↑	Alias	Username
☐ Edit	Site Guest User, speaker	guest	speaker editor

On the User record for the site the related list Manage Packages does not have a quick link so you need to scroll down to bottom of the page.

User

[Edit Layout](#) | [Help for this Page](#)

speaker Site Guest User

[Permission Set Assignments \[0\]](#) | [Permission Set License Assignments \[0\]](#) | [Public Group Membership \[0\]](#) | [Queue Membership \[0\]](#)

User Detail

Edit

not listed

scroll
down

Name	speaker Site Guest User
Alias	guest

User License	Guest
Profile	speaker Profile

No records to display

Queue Membership

New Queue

No records to display

Managed Packages

Assign Licenses

No managed packages assigned.

Assign Licenses

Select the checkbox next to each package you want to assign to this user, and then click Assign. The have sufficient licenses available or the package status is expired or suspended.

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S

Unassigned Packages				Select Shown	Deselect Shown	Deselect All
Action	Package Name ↑	Status	Allowed Licenses	Used Licenses		
☒	YAT	Active	3	1		

Selected Packages	
Action	Package Name
☒	YAT

Override all labels:

You've asked to be able re label tabs and fields. Well we've gone a step further by making the app work with the translation workbench. This means you can now override all field labels including on the visual force page. Additionally you can override record type labels, validation error messages and more. Those of you saying that management wants "programs" to be labeled "class" or "youth" to "contact", can now do all that.

Language Support:

This should give multi language support since the translation workbench is used for translating as well.
(Unable to fully test)

To Override:

Youtube video instructions:

<https://www.youtube.com/watch?v=PTsTtkvlo04>

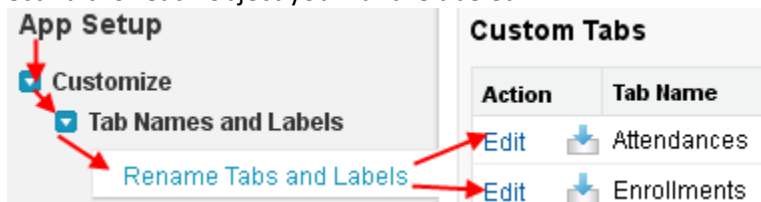
Written instructions:

The object (includes Tab) and record name field:

Under Setup

In App Setup – Customize – Tab Names and Labels - Renames Tab and Labels

Then select Edit for each object you want relabeled



EX change Programs to Classes

Tab	Programs
Language	English
Record Name	Program Name
Singular	Program Example: Account
Plural	Programs Example: Accounts
Starts with vowel sound	☐

Tab	Classes	Quote Moments	Reports
Language	English		
Record Name	Class Name		
Singular	Class		
Plural	Classes		
Starts with vowel sound	☐		



Class

test program 1

[« Back to List: Custom Object Definition](#)
[Feedback Form](#)

Class Detail

Class Name

test program 1

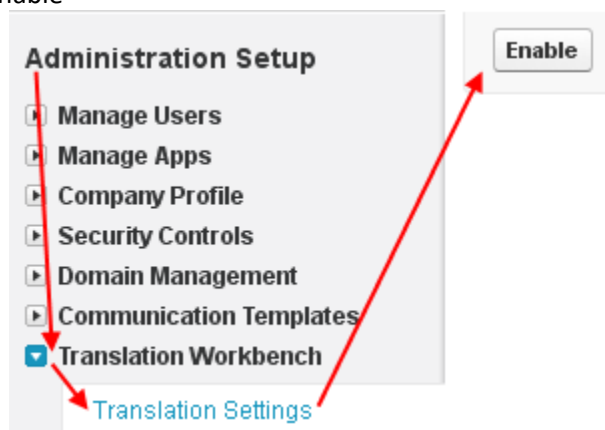
Program Type

To override the rest of the app, use Translation Workbench:

Under Setup

In Administration Setup – Translation Workbench – Translation Settings

Click “Enable”



Then add a language, which is your default language.

Translation Workbench

Click Add to select the languages your organization support

Supported Languages

Add

No languages added.


The Translation Workbench is currently enabled for yo

Language Translation Edit

Select Language

LanguageEnglish

Active☒

Identify Translators for this Language

To make users translators for this language, select them from the "Add Setup and Configuration" permission so that they can begin translating.

Search Users

Available List

Selected List

Eric Stephenson

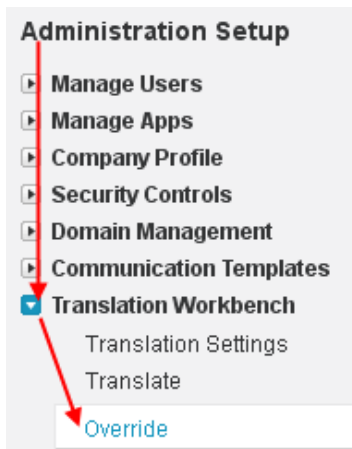
Add

Remove

Your not translating
Leave this blank

-None-

Now you can "Override" English for the rest of the app.



Translation Workbench

[Help for this](#)

Override

To get started in the translation workbench

1. If you have items to override in more than one language, select a language.
2. Select a setup component.
3. If necessary, select an object and aspect. For example, a workflow task has an object (Account, Contact, etc.) and aspect (Subject or Comment) to filter for overridable terms.
4. Double click in the override column to enter new values. You can tab to jump to the next row.

A screenshot of the 'Select the filter criteria' dialog box. It has fields for Package (YAT), Language (English), Setup Component (Action), and Object (a dropdown menu). A red box around the Package field is annotated with 'YAT is the Attendance Tracker's package name'. A red box around the Object dropdown is annotated with 'Pick what you want to override'. The Object dropdown menu is open, showing options: Action, Apex Sharing Reason, Button and Link Label, Custom Field, Custom Report Type, Lookup Filter, Record Type, S-Control, Validation Error Message, Web Tab, and Workflow Task. Below the dialog, a table header is visible with columns: Overri..., Quick Action Name, and Out of D.

For fields: You may need to update more than one object to relabeled all places a term shows up.

Package: YAT

Language: English

Setup Component: Custom Field

Object: Class

Aspect: Field Label

Field Label: Field Label

Related List Label: Related List Label

type the override text

Master Field Label	Field Label Override	Field Type
Average Program attendance	Average Class Attendance	Formula (Percent)
End Date		Date
Family Feedback Forms Colle...		Number(18, 0)
other program site	other class site	Text(65)
other program type	other program type	Text(65)
Partner Feedback Forms Coll...		Number(18, 0)
Program Season	Class Season	Picklist
Program Site	Class Site	Picklist

Rubric number field on attendances:

On attendances a new field for Rubric number, which can be used to track test scores or some other metric. This number can have up to 2 decimal places.

Default Value present

Now when you add a session, you can pick a default value for the attendances that are generated. This only affects the attendance when they auto created and does not update an attendance afterwards. Adding this field to a layout will allow your user to make this choice on when creating each session. Alternatively the field can be set by the admin.

Setting a Default Value present for all sessions

In set up

Under App Setup – Create – Objects

Click on “session”

App Setup

- Customize
- Create**
 - Apps
 - Custom Labels
 - Objects**

Then in "Custom fields & relationships" find "Default Value Present"

Action	Field Label	API Name	Install
Edit	AttendanceTotal Not Present	yat__AttendanceTotal_Not_Present__c	YAT
Edit	Attendance Total Present	yat__AttendanceTotalPresent__c	YAT
Edit Replace	Default Value Present	yat__Default_Value_Present__c	YAT

Then in "Custom fields & relationships" find "Default Value Present"

Custom Fields & Relationships New Field Dependencies

Action	Field Label	API Name	Install
Edit	AttendanceTotal Not Present	yat__AttendanceTotal_Not_Present__c	YAT
Edit	Attendance Total Present	yat__AttendanceTotalPresent__c	YAT
Edit Replace	Default Value Present	yat__Default_Value_Present__c	YAT

In the "Picklist values section and on the value you want to be default for the org and check the "Default" box to make it the default. Values are used to when the attendance are auto created to check (true) or uncheck (false) the "present" field on the attendances.

Picklist Values New

Action	Values	Default	Chart Color
Edit Del	true	☐	Assigned dynamically
Edit Del	false	☒	Assigned dynamically

Default Value Present

Default ☐ Make this value the default for the master picklist

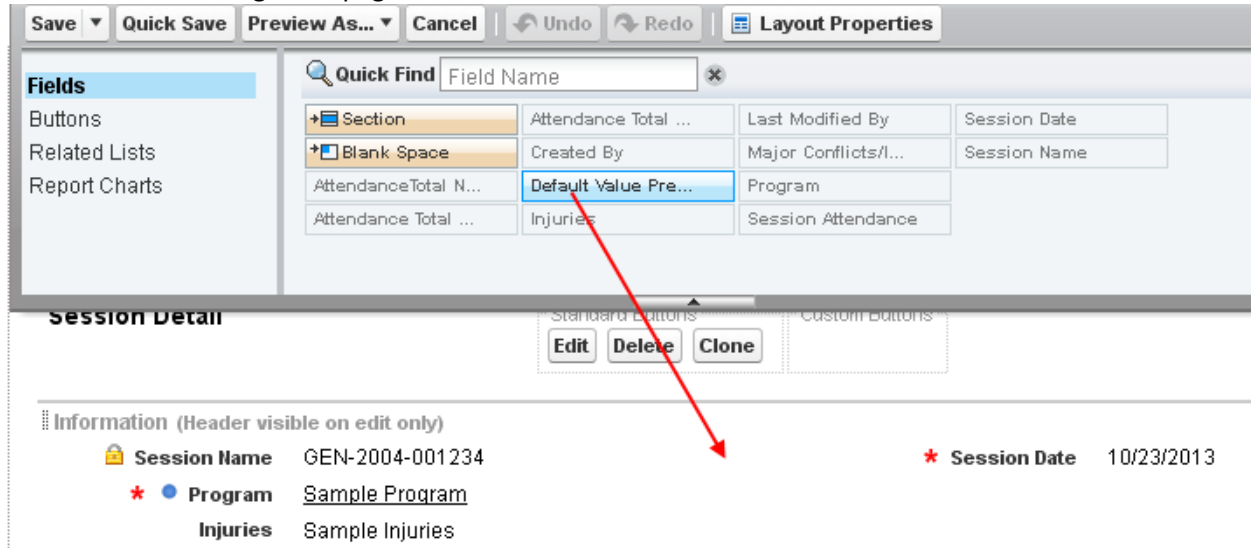
Chart Color Assigned dynamically 

Save Cancel

Adding a new field to a page layout

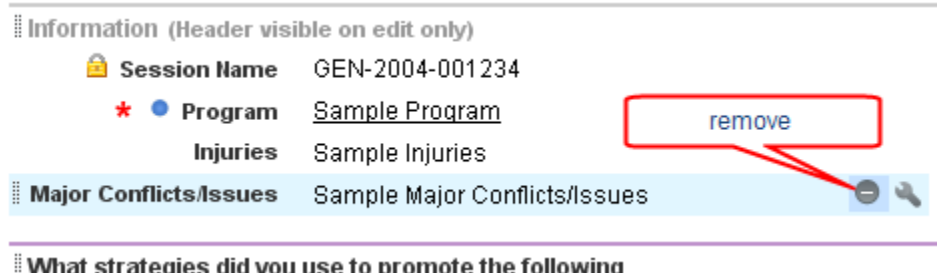
When upgrading to a new version, you may want to add new fields to a page layout or remove one. Click edit Layout

Click on a field to drag on to page



Remove the field from page layout

Click the Minus Circle image.



New Customization for Version 1.8:

Session Attendance Creation OverRide

If you don't want to create Attendances when adding a new Sessions, then set the AttendanceOverRide field to "NoFire" before saving the session. Often this is useful if you are integrating with another system that creates attendances, or inserting new attendances using the dataloader. Like with the "Default Present Value" (See above), "AttendanceOverRide" field also is a field that uses picklist values to determine if:

"None" - default trigger fires normally to create Attendances

"NoFire" - prevents trigger from firing when creating a new session

FieldSets for Update Attendance pages

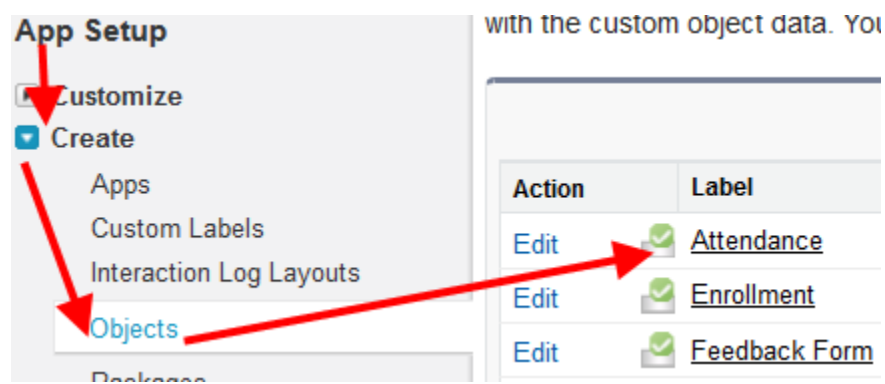
While Grid Buddy is a great app that works on any object, we realize that by adding fieldsets to the update attendances page can add value and save money for large customers including ones that use communities.

Fieldsets are used to add fields to a visualforce page without coding. Like page layouts to can drag and drop custom fields and standard fields on the page. Fields sets have been added to 2 pages.

- 1 The original attendance Update page that you use the “update” button to get to
 - 2 The new attendance UpdateFS page that you use the “updateFS” button to get to
- In both cases, you are still clicking on a session name field to get back.

Editing fields to FieldSets

To find FieldSets for attendances in SetUp, under App Setup, Click Create – Objects – Attendances



Then find the section for FieldSets and click the edit button to change the displayed fields.

Field Sets New Field Sets				
Action	Field Label	Installed Package	API Name	Where is this used?
Edit	ADFieldSet	YAT	yat__ADFieldSet	On Update attendance page add new fields to end of page
Edit	FS1_outputFields	YAT	yat__FS1_outputFields	On Update2FS button/page. This is for Non-Editable Output fields
Edit	FS2_InputFields	YAT	yat__FS2_InputFields	On Update2FS button/page. This is for Editable input fields
Edit	FS3_outputFields	YAT	yat__FS3_outputFields	On Update2FS button/page. This is for Non-Editable Output fields

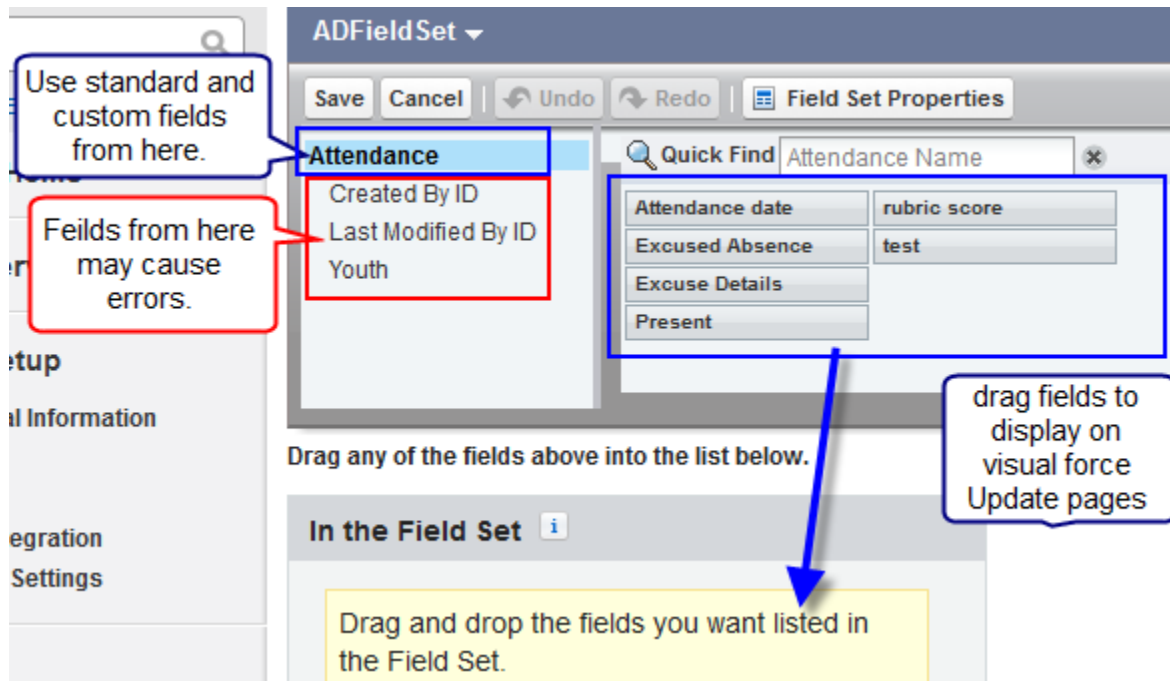
1 The original attendance Update page that you get to by using the “update” button. The “ADFieldSet”, FieldSets have been added to the end of the original attendance Update page.

2 The new attendance UpdateFS page that you get to by using the “updateFS” button. This Update page is divided into 3 parts. From left to right is:

The “FS1_outputFields” FieldSets is for Non-Editable fields, which by default has the Session Name field for a link back to the Session record.

The “FS2_InputFields” FieldSets is for Editable fields that can be saved.

The “FS3_outputFields” FieldSets is for Non-Editable fields.



You can optionally leave any of these FieldSets blank.

If you create custom fields you can add them to the above FieldSets to include on either page.

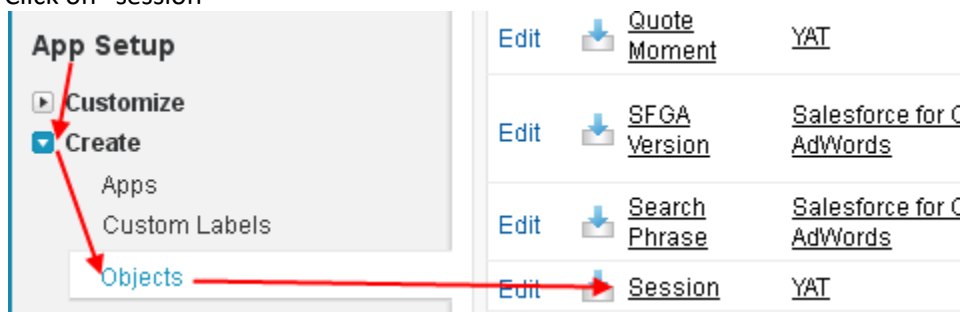
These fieldSets are for Attendance fields ONLY, regardless of if Salesforce offers an option to add related fields. Instead of adding related fields, a formula field can be created on the Attendance object to display the related fields.

Displaying the update button

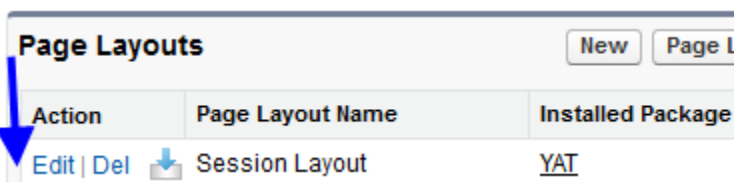
In set up

Under App Setup – Create – Objects

Click on “session”



Then find the section for Page Layouts and click the “Edit” button to change the displayed fields.



Related List Properties - Attendances

Buttons

Standard Buttons:
Select standard buttons to display on the related list.

☐ New

Custom Buttons:
Select custom buttons to display on the related list. You can also remove buttons.

Available Buttons
UpdateFS

Selected Buttons
Update

select buttons and use arrows to determine if "selected" to be displayed on session

OK Cancel Revert to Default

Example of FieldSet Uses:

Session *	Monday	Wednesday	Tuesday	Thursday	Friday	Youth *
100208						Alexandra Dusz
100208						Diana Milburn
100208						Amy Bryan
100208						Haley Dent

Youth	Session	Clock In
Alexandra Duszak	\$00208	7/12/2014 9:34 AM (7/12/2014)
Diana Milburn	\$00208	(7/12/2014)

[illegible]

New Customization for Version 1.11:

Custom Label for update attendance page

There are several labels that can now be changed on the update attendance page, including buttons and messages. This additionally improves the Translation Workbench abilities to support other languages.

Salesforce1 Quick Start

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- Salesforce Files *New!*
- My Connected Data

App Setup

- Customize
- ☒ Create
 - Apps
 - Custom Labels**

Custom Labels are custom text values, up to 1,000 characters, that can be accessed from Apex Classes or Visualforce Pages. If Translation Workbench has been enabled for your organization, these labels can then be translated into any of the languages salesforce.com supports. This allows developers to create true multilingual apps by presenting information to users - for example, help text or error messages - in their native language. You can create up to 5,000 custom labels.

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

New Custom Label

Action	Name ↑	Categories	Short Description	Value	Language
↓	AttendanceButtonCancel	Attendance	AttendanceButtonCancel	Cancel	English
↓	AttendanceButtonNext	Attendance	AttendanceButtonNext	Next	English
↓	AttendanceButtonPrev	Attendance	AttendanceButtonPrev	Prev	English
↓	AttendanceButtonSave	Attendance	AttendanceButtonSave	Save	English
↓	AttendanceCount	Attendance	AttendanceCount	Number of records in Session	English
↓	AttendanceMessage	Attendance	AttendanceMessage	After saving Click on the session number to return to the session.	English
↓	AttendanceTitle	Attendance	AttendanceTitle	Attendance List	English

The “Value” in the above image corresponds the Text in the below image.

Attendance List

[Save](#) [Cancel](#)

After saving Click on the session number to return to the session.

[Prev](#) [Next](#)

Attendance Name	Youth	Session	Present	Excused	Absence	Excuse Details	rubric score
a06083	Dalila Perez	s00896	☐	☐			
a06084	Maria Perez	s00896	☐	☐			
a06085	Hawa Toure	s00896	☐	☐			

[Prev](#) **3 number of records in Session** [Next](#)

[Save](#) [Cancel](#)

Click on the Name of the Custom label you want to change. *Note you must have already enabled the translation work bench in order to see the below button (also see above section on Overriding Labels to learn more about translation workbench and overriding labels).*

Click the “New Local Translations / Override”.

AttendanceButtonCancel (Managed)

« [Back to List: Custom Labels](#)



This Custom Label is managed, meaning that you may only edit certain attributes. [Display More Information](#)

[Local Translations / Overrides](#) [0] | [Packaged Translations](#) [0]

Custom Label Detail

Short Description	AttendanceButtonCancel	Name	AttendanceButtonCancel
Language	English		
Namespace Prefix	yat		
Installed Package	<u>YAT</u>		
Categories	Attendance		
Value	Cancel		
Created By	<u>Eric Stephenson</u> , 4/20/2016 12:11 PM	Modified By	<u>Eric Stephenson</u> , 4/20/2016 12:11 PM

Local Translations / Overrides



[New Local Translations / Overrides](#)



These translations were created by administrators in your company. Local translations override packaged ones.

No records to display

Packaged Translations



These translations were automatically created when the upgradeable AppExchange package containing this custom label was installed. Although you cannot delete packaged translations, you can override them with your own text by clicking the Override link next to the desired language. Overridden translations appear in gray.

Select a language & type the new Translations / Override.

New Translation

Translation Edit

SaveCancel

Master Label Information

Master Label

AttendanceButtonCancel

Master Label Text

Cancel

Translation Information

Language

English

i

Translation Text

stop

Check page, to see results.

Attendance List

Save

stop

Limit return results for update attendance page

In the past, the number of results returned on the Update Attendances Pages, was limited to 10. Now you can increase this limit to see more attendances on a single page. We recommend keeping this under 50.

Click Develop-Custom Settings-Manage (for the AT Setting Public)

Customize

Create

Develop

Apex Classes

Apex Triggers

Apex Test Execution

API

Visualforce Components

Custom Permissions

Custom Metadata Types

Custom Settings

Percentage of custom settings data used: 0%

You are currently using 0 MB of custom settings data in your organization, out of an allowed limit of 10 MB.

View: All

Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

New

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records	Total Si
Manage	AT Setting Public	Public	Hierarchy	yat		103	1	103

You can settings for the entire org or different settings for profiles or even different users. If you choose not to set this up then the old default is still 10.

AT Setting Public

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

New **Org wide default**

▼ **Default Organization Level Value**

View: **All** ▼ [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other **All**

New

Setup Owner ↑	Location
No records to display.	

Profiles or Users

Click new to set an Org Wide Default for all users. Then change the limit & click save the button.

Edit AT Setting Public **Save** **Cancel**

AT Setting Public Information

Location

Limit

The org wide default can be overridden for Profiles & Users. Click new for Profile or Users then select either Profile or User from the location picklist & use the magnifying glass to look up the Profile or User. Change the limit & click save the button.

Edit AT Setting Public **Save** **Cancel**

AT Setting Public Information

Location **Profile** ▼ 🔍

Limit

Alphabetical Sort Order for Update Attendances Pages

Now the Sort Order, for youth contacts on the update attendance page, can be sorted alphabetical by starting with either a First or Last name. By default, the update attendance page was not sorted alphabetical contact name, but now it can be.

This is controlled by the "Attendance Sort Order" field on the Session record. So users can control the sort order. (For older orgs you may need to add this field to the page layout.)

Session Edit Save Save & New Cancel

Information | = Required Information

Session Name s00000 Session Date 4/20/2016 [4/20/2016]

Program tes program

Injuries ?

Major ?

Attendance Sort Order ? 3 First Name, Last Name ▼

--None--
1 ID
2 Last Name, First Name
3 First Name, Last Name

The default can be changed for new session's records for the entire org.

Find the "Attendance Sort Order" field under:

Custom Objects-Session- Attendance Sort Order

App Setup

- Customize
- ☒ Create
 - Apps
 - Custom Labels
 - Objects**
 - Picklists BETA
 - Packages
 - Report Types
 - Tabs
 - Action Link Templates
- Global Actions

Action	Label	Install
Edit	Attendance	YAT
Edit	Enrollment	YAT
Edit	Feedback Form	YAT
Edit	Program	YAT
Edit	Project	YAT
Edit	Quote Moment	YAT
Edit	Session	YAT

After clicking on the "Attendance Sort Order" field, select edit for the value you want to use.

Picklist Values New R Chart Col

Action	Values	Default
Edit Del	1 ID	☐
Edit Del	2 Last Name, First Name	☒
Edit Del	3 First Name, Last Name	☐

Then select the "Make this value the default for the master picklist" checkbox & save to change the default .

Attendance Sort Order: 3 First Name, Last Name

Default: ☐ Make this value the default for the master picklist

Chart Color: Assigned dynamically [Color Picker Icon]

Note: If you change the text for the value, remember that first number is what controls how the code sorts, so don't change the first number.

Older orgs can use the data loader to mass update old records if needed. Remember best practice is to create attendance on the same day you take attendance so only orgs that create attendances in advance may want to mass update old records.

Lightning page with Related List for Sessions or I don't want a popup button

Salesforce does not support Actions for related list, meaning that Java script buttons are the only option. Worse Salesforce threatens to end support of Java script buttons & we've had issues with them in the past due to several different ways to write them. Therefore we went with the "ForURL" function for a formula field like button to reduce problems.

Fear not, we've actually got another solution. Turns out when we add visual force (to update Attendances) to the Lightning App page layout for the Sessions object, it just works.

"Lightning app builder" uses existing salesforce page layouts for some things but does its own layout for other things. This results in hopping back and forth between app builder & page layouts. Additionally its got its own permissions so if you're not completely confused yet, let get started.

There is a sample page called "Session Sample" as part of this managed package. Which you can clone to modify, or create your own from scratch. Here's how we created this page:

Start with "Lightning App Builder" under "Setup."

Next select "Record Page"

Enter a name & for the Object select "Session" because that's what we are replacing.

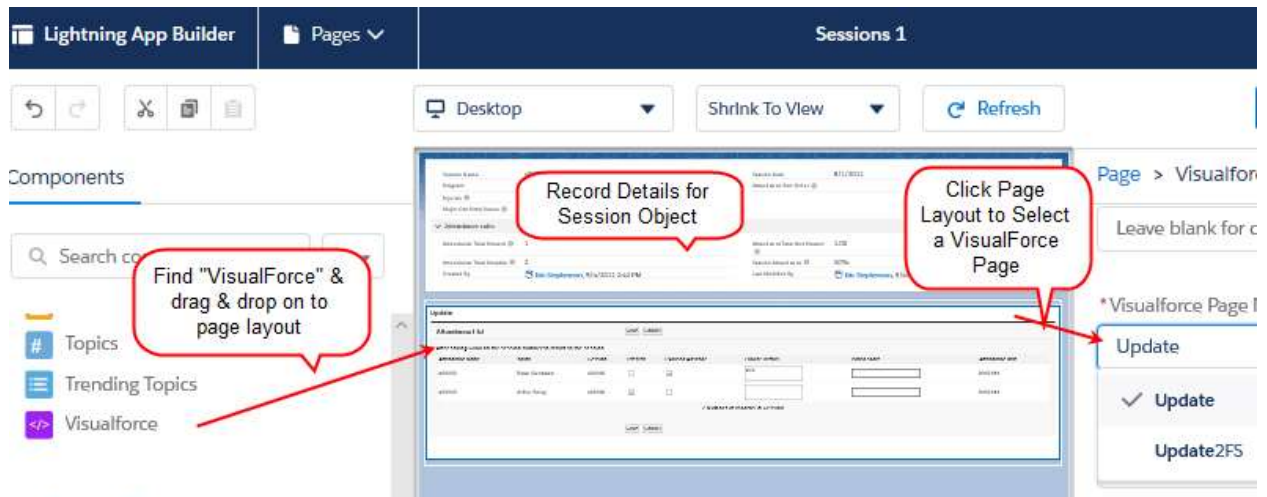
Select a page layout, which will be blank so its up to you. We choose "Grouped Header and 1 region".

In the below image, we can see how to use the left side to drag & drop to the middle section. We dragged Record Details to get the Session record details.

We also dragged the "Visual Force" so that our update page is on the page instead of a pop up from a button. Then we selected "Update" which does not have the field sets. Both pages do work.

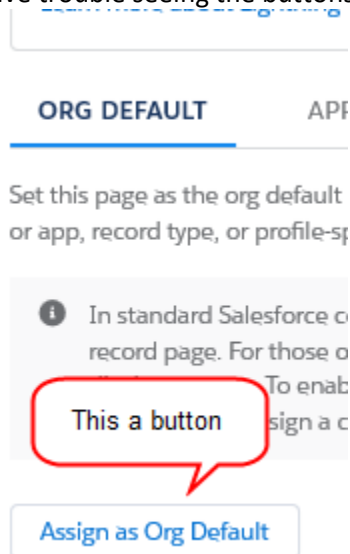
The image does not show, but for VisualForce there is an option for "Height in pixels" which depending we may want to increase if records don't show, so we set a height of 1000 instead of 300 default.

Lightning is supposed to automatically adjust but the fact that it usually does not is one our many reasons to be against using lightning. Otherwise we get second scroll bar which is better than clipping the page (at least from my testing.)



Lighting Page Permissions

Next we need to click "Activate" to "Assign" the page to users. We need to click the "Assign as Default" which may be difficult to see the light blue boarder. The default color choice is another issue since we have trouble seeing the buttons. Just click next and select something for the next few steps flow wizard.



Then go check a session

Session Name	s00036	Session Date	9/12/2013
Program	CAMP-2011-Fall-Citywide	Attendance Sort Order	
Injuries	15		
Major Conflicts/Issues			

Attendance calcs

Attendance Total Present
7

Attendance Total Possible
15

Created By
Eric Stephenson, 9/12/2013 4:16 PM

AttendanceTotal Not Present
8.00

Session Attendance
47%

Last Modified By
Eric Stephenson, 10/21/2013 2:40 PM

Update

Visual force page to update attendances

Second scroll

Next

ATTENDANCE NAME	YOUTH	SESSION	PRESENT	EXCUSED	ABSENCE	EXCUSE DETAILS	RUBRIC SCORE	ATT
a00079	Dalila	s00036	☐	☒		updated		9/1
a00080	Binyam	s00036	☒	☐		test		9/1

Also note that different browser may work differently and may require the browser to be refreshed but here's what we noticed:

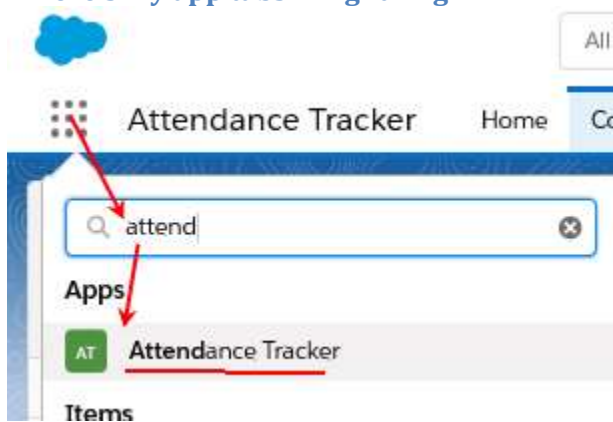
After clicking "save," its recommended to refresh the page

Cancel was designed to return to the Session page by closing the Popup update page, in lightning page Cancel seems to work as refresh button.

In the session, editing the "Attendance Sort Order" did refresh the page and sort the VisualForce Update grid.

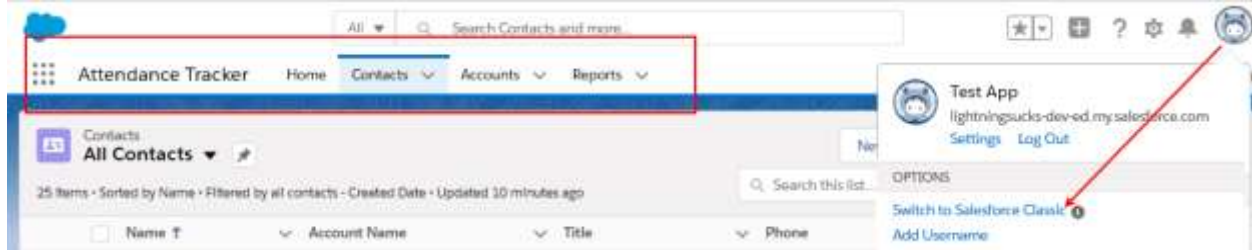
You can get more complex with permissions if you like, but that's out the scope of this tutorial so find salesforce tutorial if that interest you.

Where's my app tabs in lightning

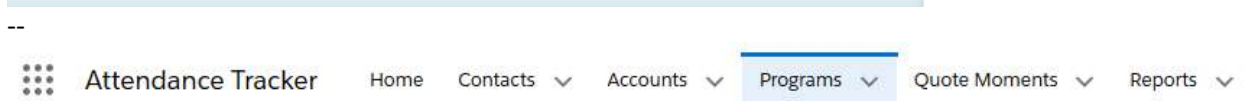


Another bizarre issue with Lightning we noticed is if we use the square 9 dots on the right side of Lightning to select "Attendance Tracker" app, we were missing the custom objects. To fix this we

needed to switch back to classic & select Attendance Tracker from the left pick list & then switch back to Lightning. We have no idea why but it wasted our day trying to figure this out.



Salesforce is rolling out security enhancements that can impact your org. [Review Security Alerts](#)



If you find more bizarre activity, report it Salesforce. They have dedicated support team that will try to pass us off their possibly intern program or as they prefer to call it trailhead Community. On a side note it is a violation of inter laws for a company to profit from an intern & the Supreme Court can reclassify volunteers as interns. When I notified [salesforces ethics line](#) that it's targeting of schools to buy certification & possibly replace paid help desk employees with underage trailhead interns; this resulted in salesforce ending a large repeat revenue stream for certification renewals. It also resulted in limiting my access to my app & community portals.

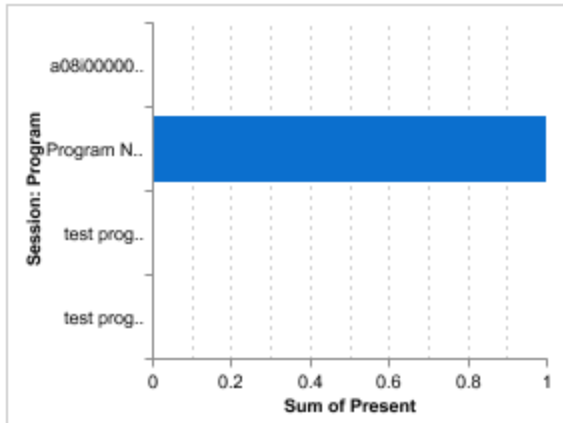
Report Charts:

Report charts can be used to display totals from a program. This comes in handy when

For example this report type "Contacts with Attendances and Session" totals the number present & groups by "program name" Attendance field. Also add a chart to the report.



Then then the "report chart" is added to the Contact "page layout" which filters the report by that contact to show its total present for each program.



Report charts auto refresh once a day, or can be manually updated.

Increase Functionality with other Apps

Attendance Tracker enhancements take time for us to create, but you don't need to wait when there are an app exchange full of apps to enhance and build upon ours.

Grid Buddy for Attendance Tracker

Attendance Tracker app has now has FieldSets on the update Attendances page. Fields Sets, allows the admin to pick the fields that show on a visual force page; however, you may have more complex needs then we have covered.

"Grid Buddy" is an app, on the Salesforce AppExchange, that lets you edit multiple records for most Salesforce objects (contacts, attendances, etc). You can use Grid Buddy to replace the visual force page for mass updating attendances by using custom fields. Grid Buddy has its own support, so this tutorial is to focus on how to replace the Update Attendance page in the Attendance Tracker app.

Grid Buddy has a paid edition and a free edition.

The free edition is limited to 5 user and 3 grids, where the grid is limited to 8 fields from an object (Attendances).

<https://appexchange.salesforce.com/listingDetail?listingId=a0N300000055r6aEAA>

The paid version allows you to have more users, grids and up to 40 fields.

<https://appexchange.salesforce.com/listingDetail?listingId=a0N300000031kInEAK>

Common examples include:

Days of the week for hours worked each day, for time cards often used in project management.

Alternatively, you can use checkboxes instead of numbers; and I've heard some use "day1", "day2", ... "day30", day31 (but I think that increases the chances of checking the wrong box).

attendanceGrid [\(configure\)](#)

Save Refresh Cancel More Actions ▾

Attendances (25)

☐	Session *	Contact *	Monday	Tuesday	Wednesday	Thursday	Friday
☐	s00077	Geoff Minor					
☐	s00077	Carole White					
☐	s00077	Jon Amos					
☐	s00077	Edward Stamos					

Clock In / Clock Out for tracking actual time worked, or tracking time lost due to lateness. If using the date time field I recommend set the default value to “Now()” if you plan on creating sessions on the day that you track attendance for. For project management you may have a lunch In/Out. Alternatively, you use 3 picklist fields for hour, minute and AM/PM.

attendanceGrid [\(configure\)](#)

Save Refresh Cancel More Actions ▾

Attendances (25)

☐	Session *	Contact *	Clock In	Clock Out
☐	s00077	Tony Stark	11/10/2013 6:18 AM	11/10/2013 6:00 PM
☐	s00077	Steve Rogers	11/10/2013 6:00 AM	11/10/2013 6:00 PM
☐	s00077	Stan Lee	11/10/2013 6:15 AM	11/10/2013 6:00 PM

Replace the update attendances grid

Grid Buddy free comes with 2 sample templates, so creating a new one will bring you to your max number allowed. You can also modify or delete the existing grids.

After you’ve installed grid buddy, you can create a grid by Clicking the “Grid Wizard” Tab, then selecting the “Create New” Option. (Alternatively you can select an existing grid and modify it.)



The main object is the Session (parent) so you can drill into the Attendance (child). Later we will create a button that will pass the session ID, to filter the grid for attendances for just 1 session. Here is how I set up step 1 of the grid wizard.

Grid *

URL

Use this URL to:

- Create a Tab**
Setup > App Setup > Create > Tabs > Web Tabs
- Create a Custom Link from:**
 - Home page:** Setup > App Setup > Customize > Home > Custom Links
 - Standard Object:** Setup > App Setup > Customize > [Standard Object] > Buttons and Links
 - Custom Object:** Setup > App Setup > Create > Objects > [Custom Object] > Custom Buttons and Links

See the [User Guide](#) for more details.

Name * (Alphanumeric, hyphen -, underscore _, and space characters only; 35 characters max.)

Parent Object *

Created By Eric Stephenson, 10/29/2013 9:42 AM

Last Modified By Eric Stephenson, 11/10/2013 3:30 PM

Data Management Options

Enable creates ☐ Specify whether inline creates are enabled on this Grid.

Make this grid editable ☒ Specify whether this Grid is editable or read-only.

Roll back saved records on error ☐ Specify whether the Save operation allows partial success. If you do not check this box and a record fails, the remainder of the Save operation can still succeed.

Enable deletes ☐ Specify whether a user can mass delete records on a single Grid page.

Display Options

Specify display options that the grid will launch with by default. These options can be overwritten using URL parameters the [User Guide](#).

Show header ☒ Show the standard Salesforce tab header at the top of the page.

Show sidebar ☐ Show the standard Salesforce sidebar at the left side of the page.

Display as read-only ☐ Display the grid in read-only mode. You will need to click the Edit button to enter Edit mode.

Repeat parent object header ☒ Specify whether the parent object header is repeated if related records exist.

Expand all records ☐ Display the grid with child related lists expanded.

Records per page Specify the number of records that display per grid page.

Effects only the parent (session) and not the child (attendance)

You may note that the grid does not limit the display to 10 attendances per page. This is because the limit of 10 is actually for the sessions so it is unclear if there is a limit for the number attendances that can be displayed on the page as, I tested with 25 attendances.

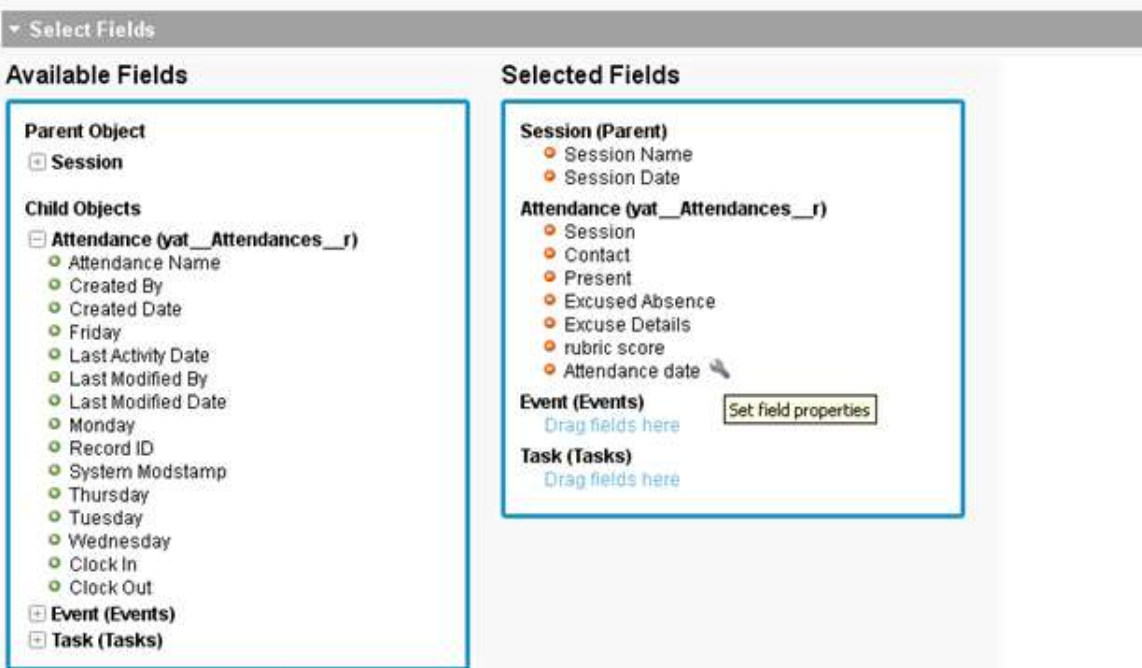
Here is how I set up step 2. Note that the fields in the “session (parent)” will not show up because the grid will be filtered by the button. This is the step where you add fields from the object by clicking the green plus icon. Also, not in the below screen shot instructions, but on each field, there is a wrench icon for making the field read only so users don’t edit the Attendance Date field. Also I include the session field if you want to link back to the session.

✔ Upgrade to **GridBuddy Unlimited** to manage up to 40 fields per object and grid. [Learn more >](#)

Click on the parent and child objects on the left to view their fields.

Select fields from the left by dragging and dropping them in their related object section on the right, or click on the green plus "+" icon  to add fields to the selected list and the orange minus "-" icon  to remove fields from the selected list. **Limits:** 15 fields per grid, 8 fields per object, 4 child objects.

Sort selected fields within an object by dragging and dropping them vertically.



Step 3 is not important.

To replace the update button

Get the URL `"/apex/gbfree__Grid?gname=attendanceGrid"` from step 1, where the grid was called `"attendanceGrid"`. We will modify the link by adding the session ID `"&id={!yat__Session__c.Id}"` so that the link is

```
/apex/gbfree Grid?gname=attendanceGrid&id={!yat Session c.Id}
```

Then on Session create a button.

Under setup – Create – Objects

On “Session” click in the related list for “Buttons, Links, and Actions” click “New Button or Link”

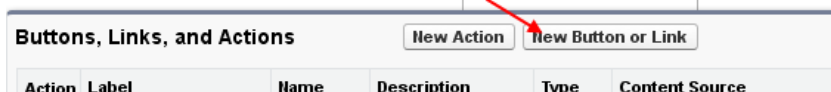
Custom Object

Session (Managed)

 This Custom Object Definition is managed, meaning that you may only edit certain attributes.

[Standard Fields \[3\]](#) | [Custom Fields & Relationships \[9\]](#) | [Validation Rules \[0\]](#) | [Page Layouts \[1\]](#)

Search Layouts [4] Buttons, Links, and Actions [8] Record Types [0]



Label
 Name [i](#)
 Description
 Display Type
☐ Detail Page Link [View example](#)
☐ Detail Page Button [View example](#)
☒ List Button [View example](#)
☐ Display Checkboxes (for Multi-Record Selection)
 Behavior [View Behav](#)
 Content Source

Select Field Type Insert Field

Next replace the “update” button on the session layout. Replacing a button on a layout was covered in the “Manually add attendances button” section above.

Original Update Attendances page replaced with grid buddy.

attendanceGrid [\(configure\)](#)

Attendances (2)

	Session	Contact	Present	Excused	Absence	Excuse Details	rubric score	Attendance date
☐	s00077	Geoff Minor	☒	☐		hello		01/03/2013
☐	s00077	Carole White	☒	☐				01/03/2013

Clone Related List

Clone Related List is a free unmanaged app on the salesforce appexchange that can clone the related list of an object to a new or existing record for the same object. For example: After you created a program and added enrollments to it; you want to clone the program and its related list of enrollments; rather then, manually add a new program and manually add each enrollment.

Because this app is unmanaged it will not work on Professional Edition or lower, it we receive large interest from lower editions then we will consider making this part of attendance tracker but for now this existing app fits the need of our current user base.

Link to Clone Related List

<https://appexchange.salesforce.com/listingDetail?listingId=a0N30000004cbbDEAQ&tab=r>

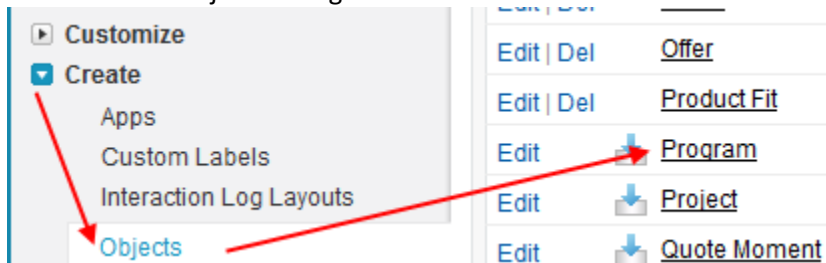
Demo Video:

<http://youtu.be/duwf56IY0bg>

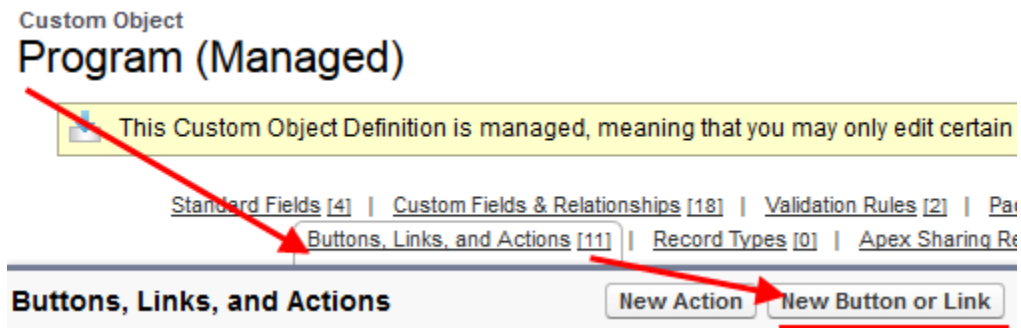
Creating a button for cloning a program

Clone Related List comes with a sample button for cloning the related list of accounts so we create similar button for Programs. You can additionally create similar buttons for other object if needed.

In setup under App Setup or Build
Click Create – Objects - Program



In Program Object Find “Buttons, Links, and Actions” and click “New Button or Link”



Create a button like below.

Custom Button or Link Edit Save Quick Save Preview Cancel

Label

Name i

Description

Display Type
☐ Detail Page Link [View example](#)
☒ Detail Page Button [View example](#)
☐ List Button [View example](#)

Behavior [View](#)

Content Source

Select Field Type Insert Field Insert Operator

`/apex/CloneListPage?sourceId={!yat__Program__c.Id}`

Note that “yat__Program__c.Id ” is the name of the program ID field that is used to determine the record that we are cloning. So if you want to create buttons on objects other than Program, you would need to change this value to the ID field for that object.

Then add the button to the layout. By finding the section for “Page Layouts” on the Program Object and clicking edit.

Then on the page Layout, use the “Buttons” to find and drag the cloneProgram button you created into the Custom Buttons area. Click Save when done.

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields
Buttons
 Actions
 Expanded Lookups
 Related Lists
 Report Charts

Quick Find

Clone	ProgramNameHolder
cloneProgram	Sharing
Delete	Submit for Approval
Edit	

Program Detail

Standard Buttons: Edit Delete Clone Sharing

Custom Buttons: cloneProgram

How to clone a program and its related enrollments

After you created a program and added enrollments to it; you want to clone the program and its related list of enrollments; rather than, manually add a new program and manually add each enrollment.

Now that you created your “cloneProgram” button, (by following the above instructions), you can click the “cloneProgram” button on the Program that has the related enrollments you want to clone.

[Feedback Forms \[0\]](#) | [Enrollments \[5+\]](#) | [Sessions \[4\]](#)

Program Detail

EditDeleteClonecloneProgram

Program Name test program3

Record SObject Types
The sObject types for each Id must be the same

must be >0 records to clone

Source Record

Select related object to clone

Select	Name	Master Detail	Record Amount
☐	Attachment	☒	0
☐	ContentVersion	☐	0
☐	Event	☒	0
☐	Note	☒	0
☐	Task	☒	0
☒	yat__Enrollment__c	☒	6
☐	yat__FeedbackForms__c	☒	0
☐	yat__Project__c	☒	0
☐	yat__Quote_Moment__c	☒	0
☐	yat__Session__c	☒	4

Find and check Enrollments

Destination Record

Click here after checking related records to clone

Copy Selected Objects

Next find and select the related record to clone. In this case its Enrollments, however, **note** that this app uses the field **API Name**, which is **yat__enrollments_c**, so if you relabeled enrollments using the **translation workbench**, this **will not change the API name** so you may need to train users on this.