Attendance Tracker Customization Guide

Contents

Introduction:

The 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 customize able. If you need major changes and have the budget for it I custom solution can be done and we can discuss this more latter. There are future changes plan 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 used in a verity of organizations, and flexible enough to be combined with other applications.

How to use:

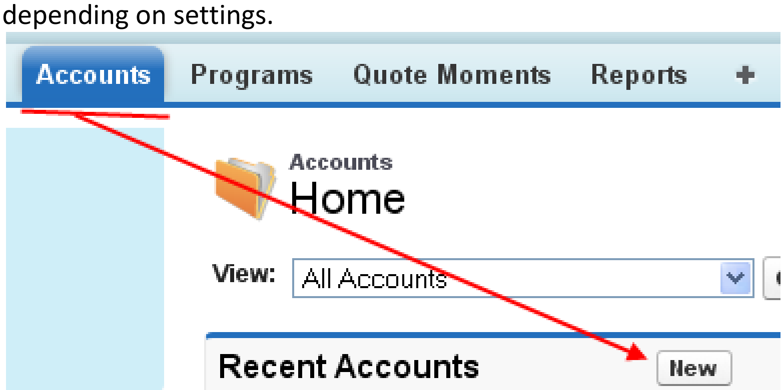
Our tutorial screen shot are taken in Classic, since Lightning still does not have all the features of classic built yet & salesforce keeps rearranging the menu to confuse us all. You'll be able to search in Lightning for the features listed or switch back to classic if you want an easier time finding 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 you contacts, as the non profit edition does this automatically depending on your settings. Recall that a contact without an account is private.

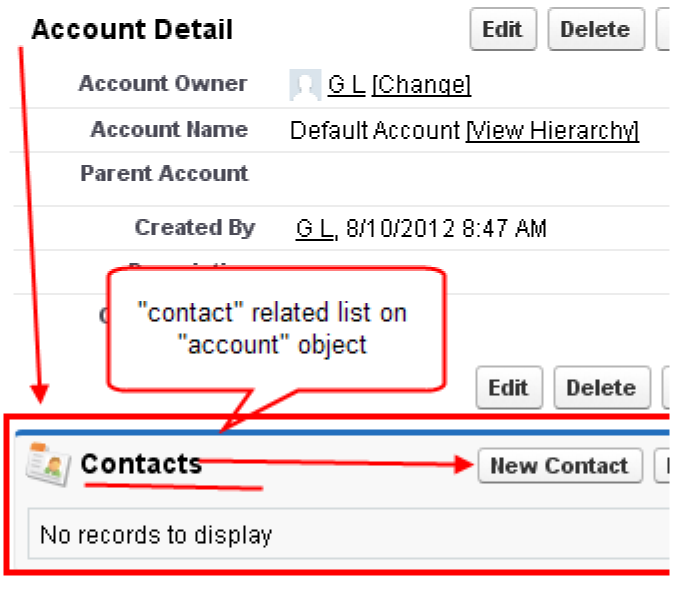
You may also notice that the contacts have record types, which for the most part have no effect on anything, but were requested by early investors in this app. You have the option of turning them off or updating you existing contact which is discussed in the "set up customize section of this document 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.



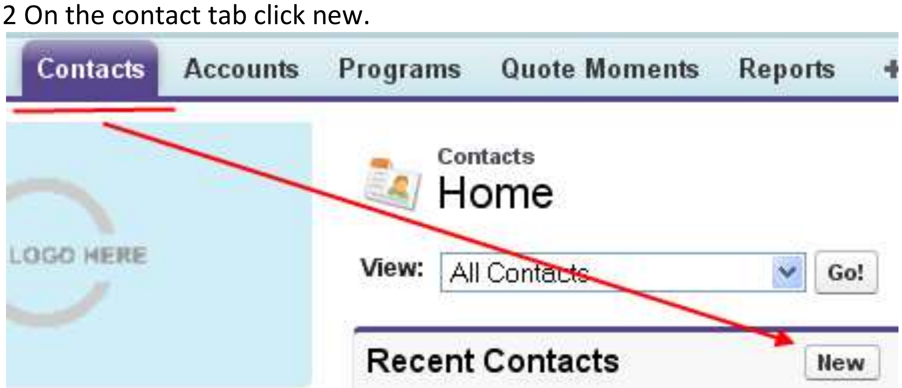
To add a contact there are 2 options:

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

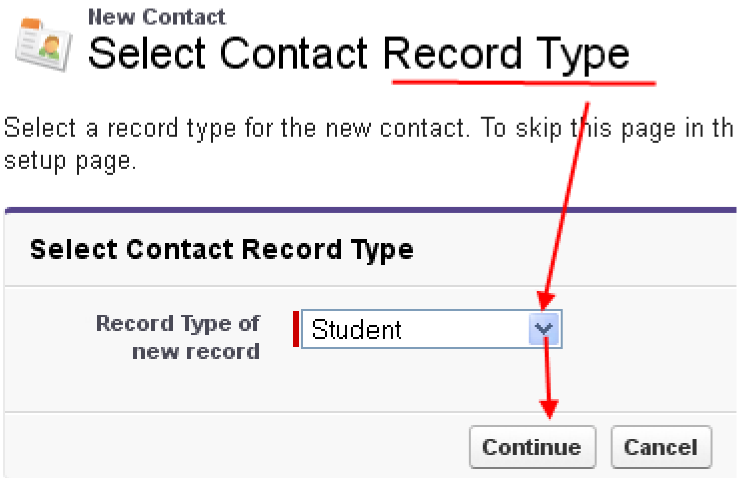


Select a record type if you didn't disable them, and fill in the remaining details on the next page and click save when done.

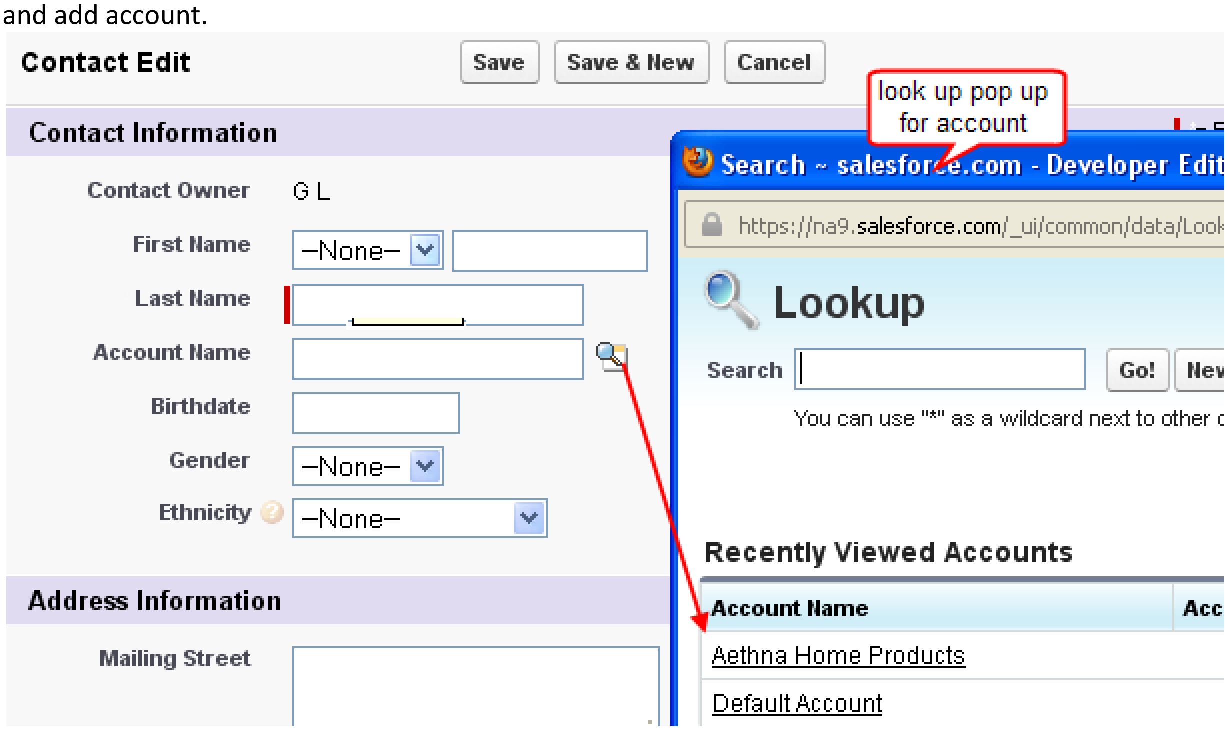
2 On the contact tab click new.



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

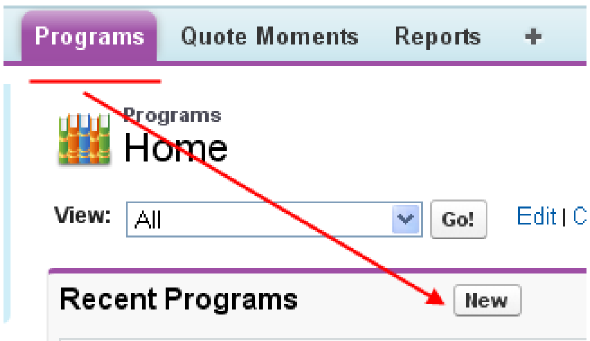


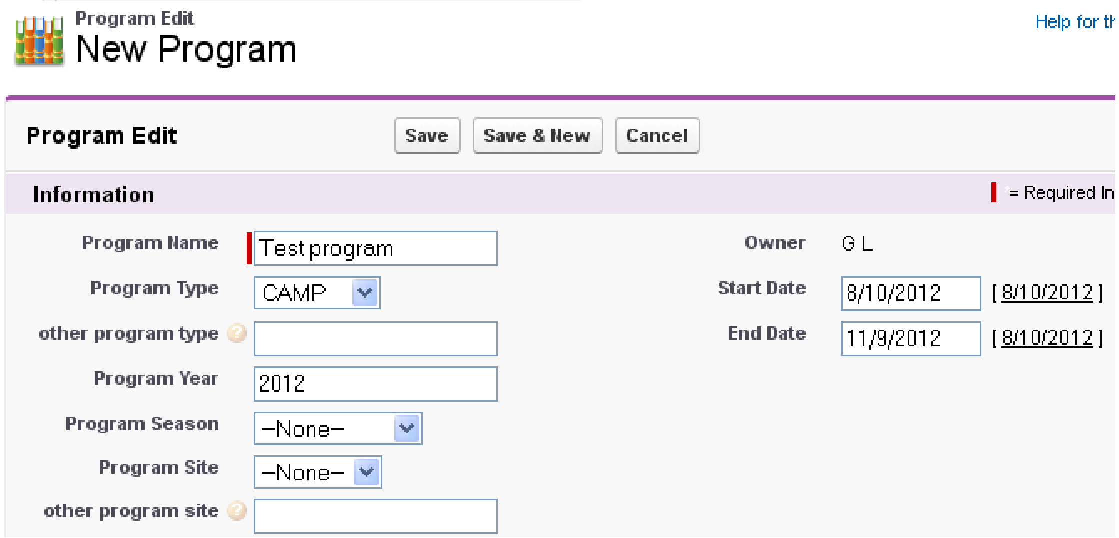
If not using the nonprofit edition app that auto adds the account, then use the look up field to add find and add account.



Add programs

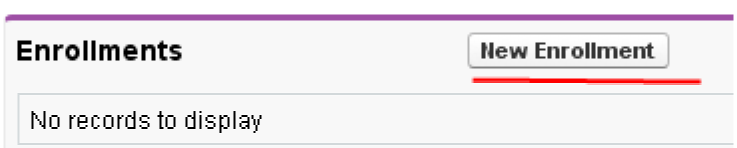
Click on the program tab and then click “new”.





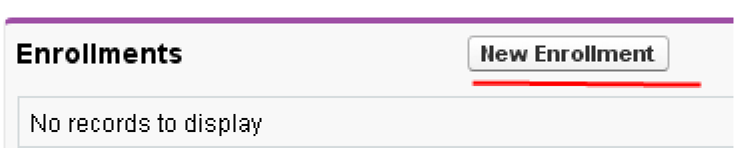
Add enrollments (link Contacts to Programs)

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".

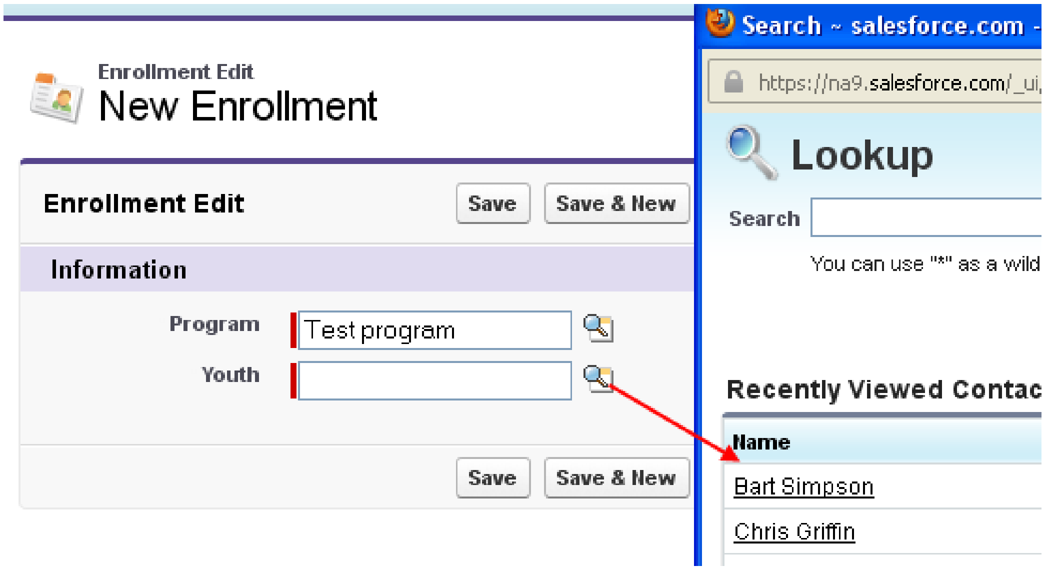


Then use the "contacts" look up to find the "contacts" you want to enroll in the "programs".

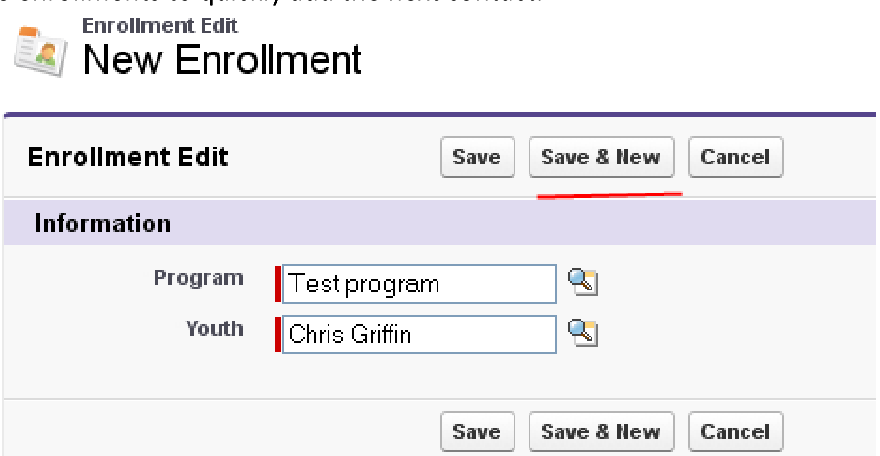
2 Click "new" from the "enrollments" related list on "contacts".



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



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.

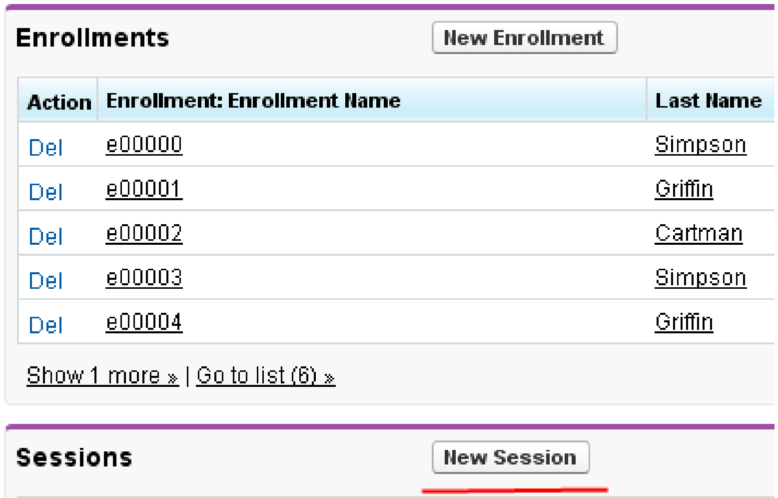


Add sessions and system will add attendances for each contact in the program

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.

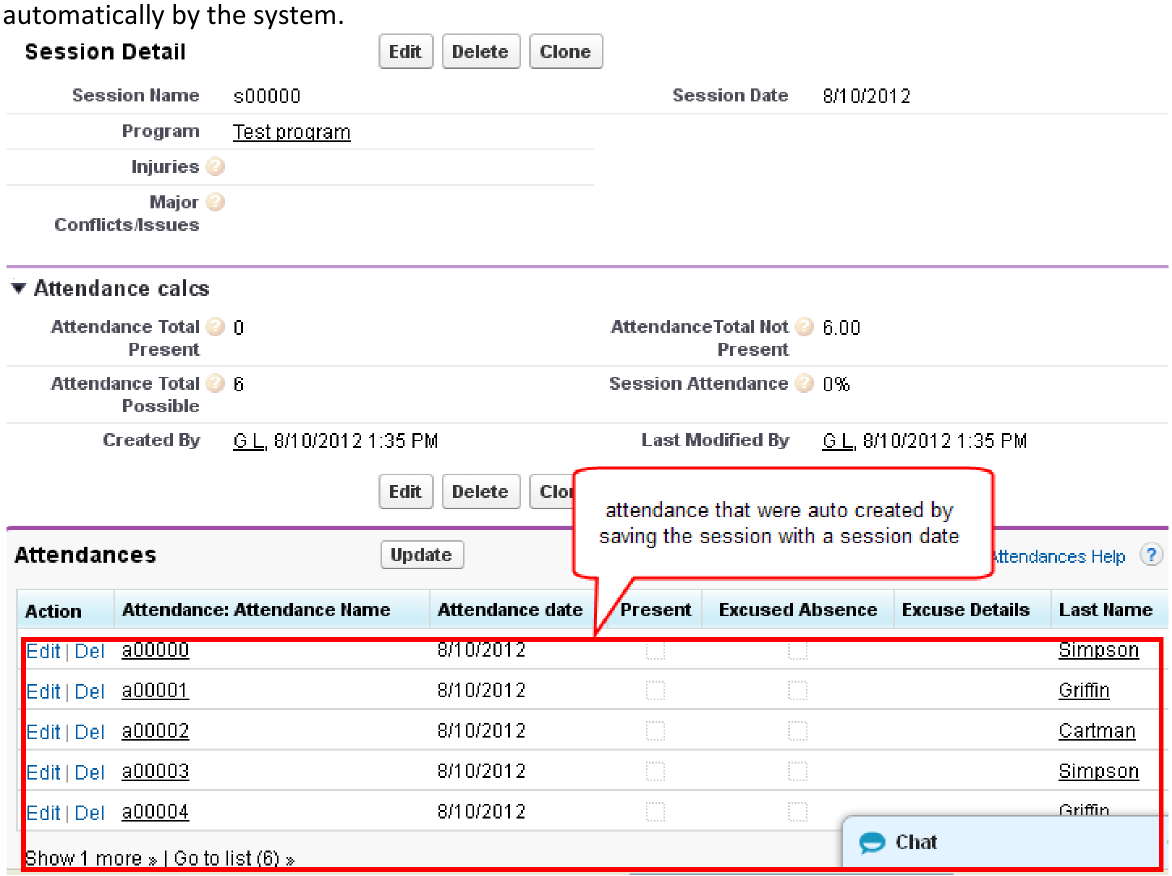
Sessions are best used for daily attendance, in which case you create 1 attendance for each day you want to track.

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



Make sure the “session date” field is filled in as this in 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.

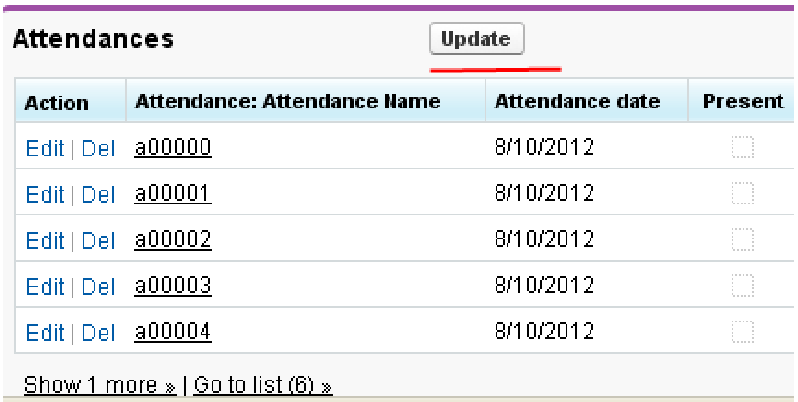


However, they can also be used for classes in a day. In this case you may add a pick list or look up field to the session to separate on reports. This only works if all the classes are in the same program. So this may work for first grade, but not in high school where they switch classes.

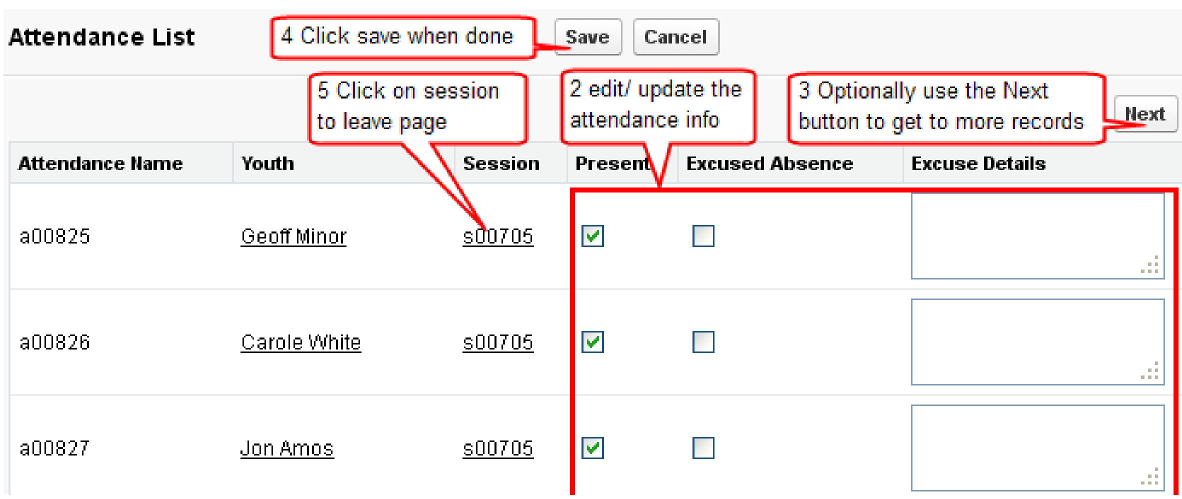
Update attendance

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)



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.



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	6	total Session Attendances	2
Total Session Days	1	Average Program attendance	33%

On Sessions:

Attendance calcs

Attendance Total Present	2	AttendanceTotal Not Present	4.00
Attendance Total Possible	6	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".

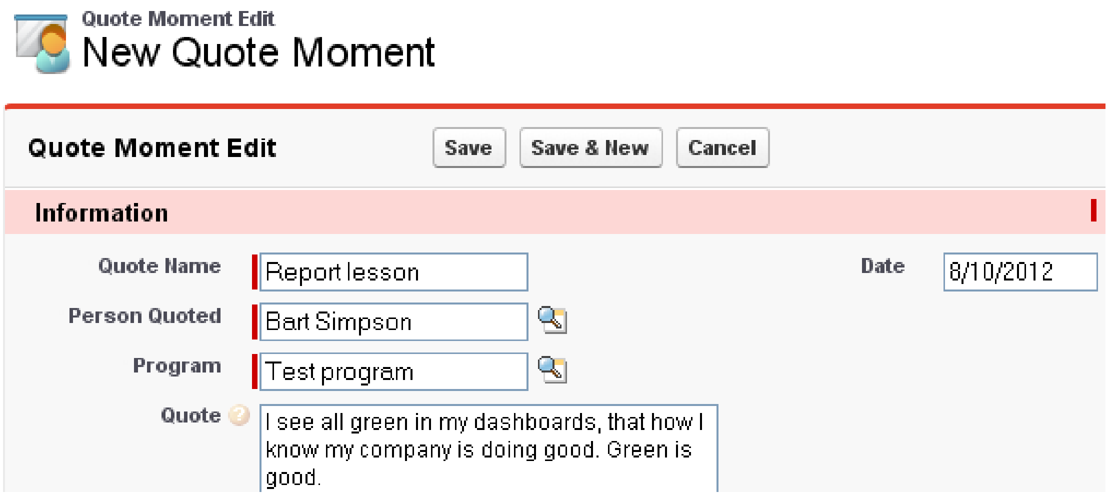
Projects New Project

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

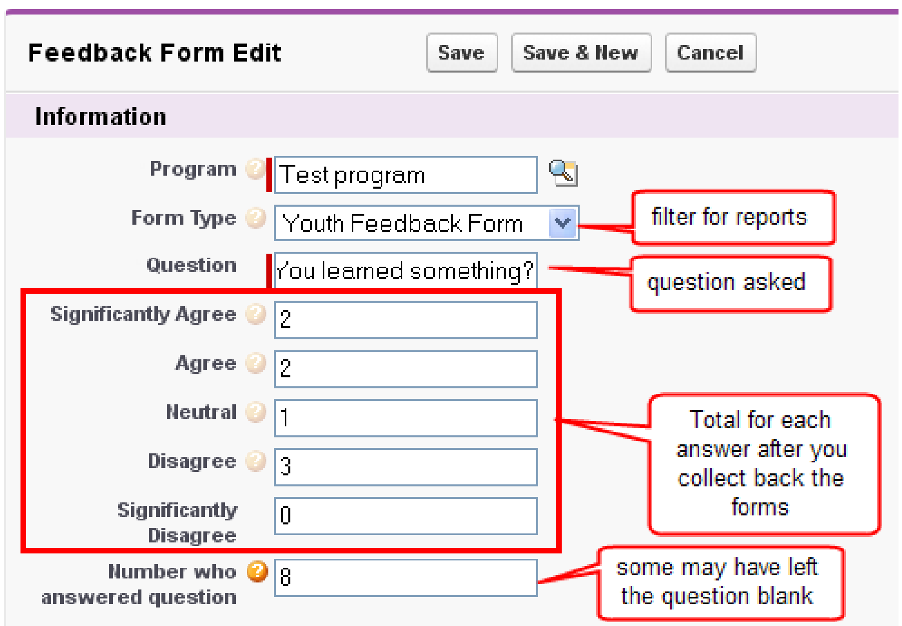
These are used for capturing quotes that contacts may say while in the program. This can be thought of as testimonials or students showing they learned the lessons of the program. For example some one that read this document may say they like attendance tracker because it saves them the time of adding 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.

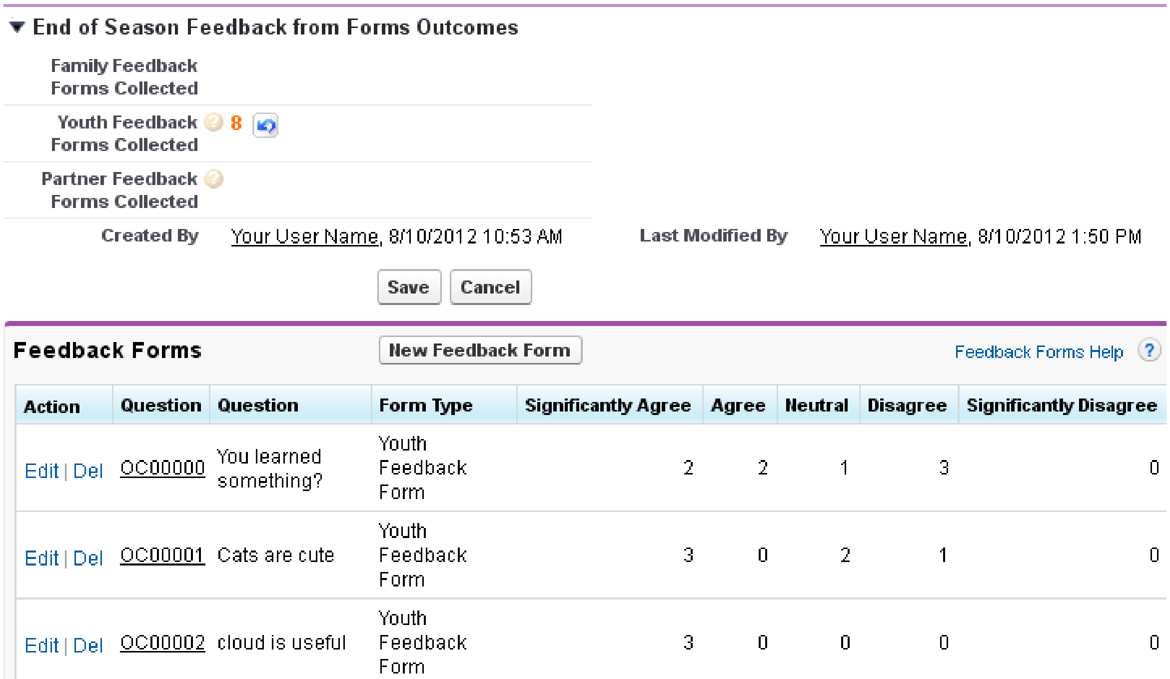
Quotes can be added from a related list on either a program or a contact.
They can also be added from the quote moments tab.



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.



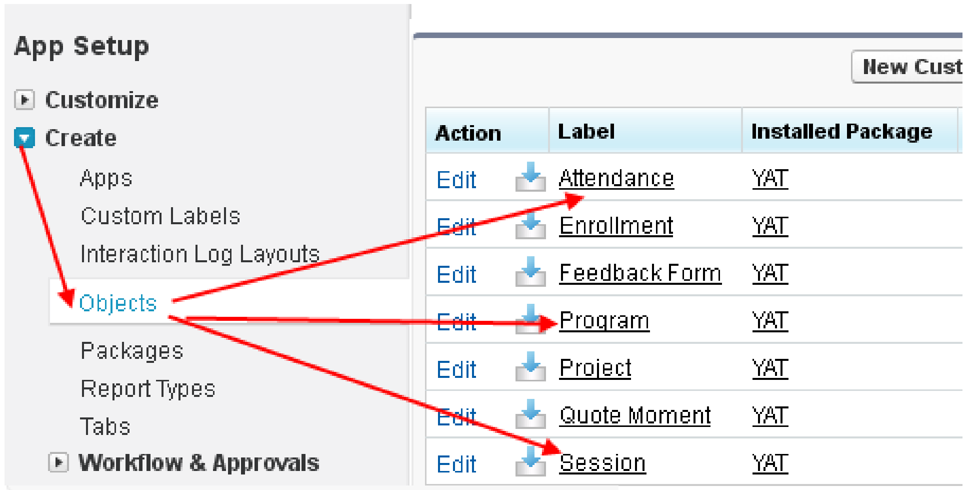


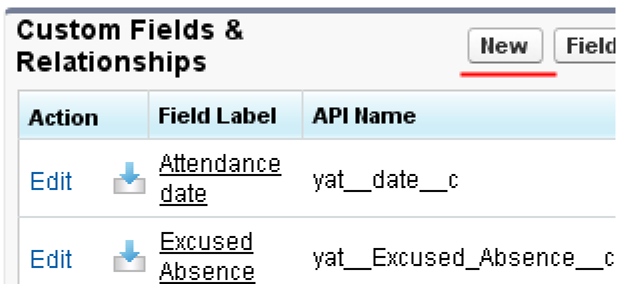
Set up / customize:

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

Adding / removing a field to a layout:

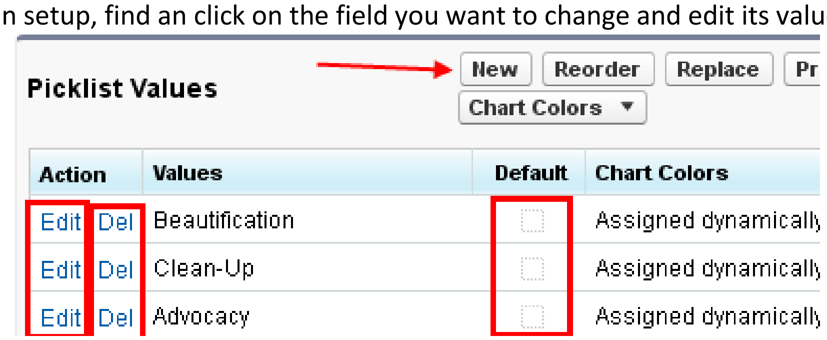
You may need to add more fields or remove extra field to use this app. You do this the same as you would in salesforce.





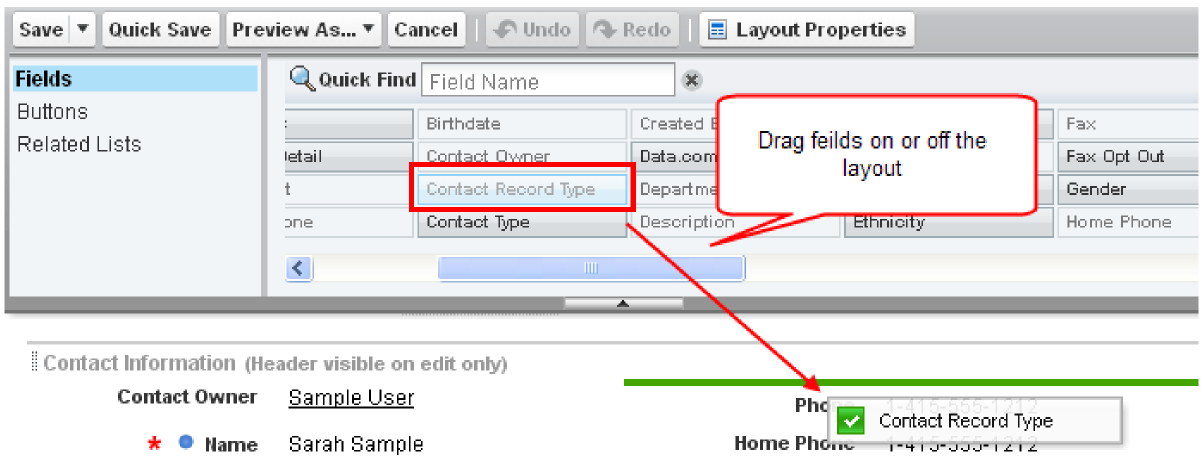
Changing a picklist

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.

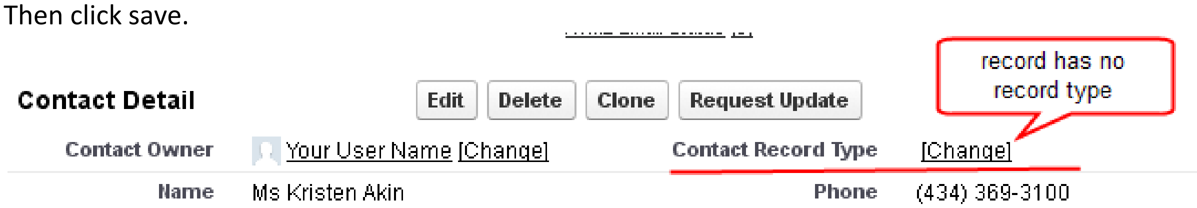


Changing a record type:

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.



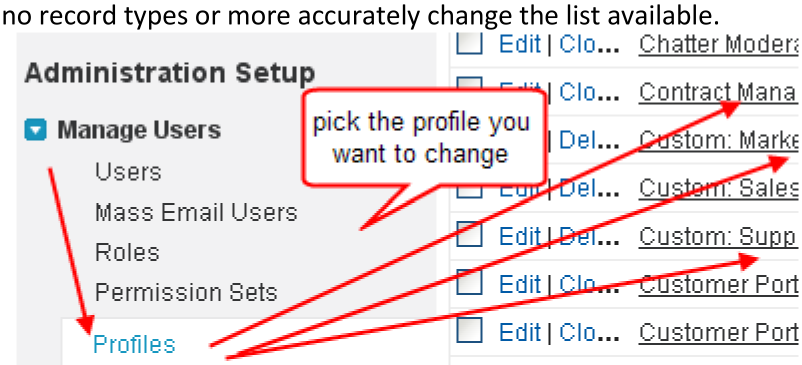
Then click save.

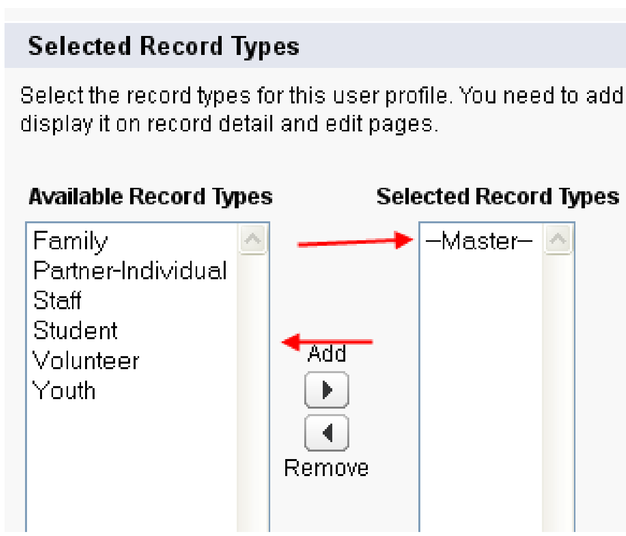


Click "change" to change the record type and just follow the wizard.

Hiding a record type:

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

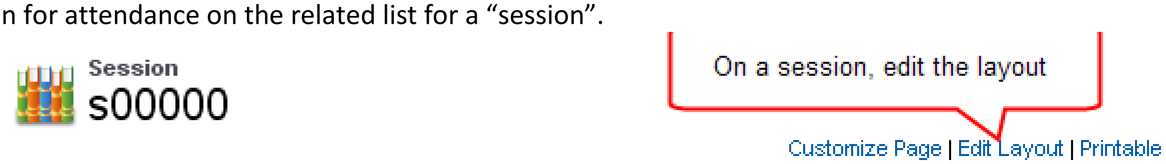




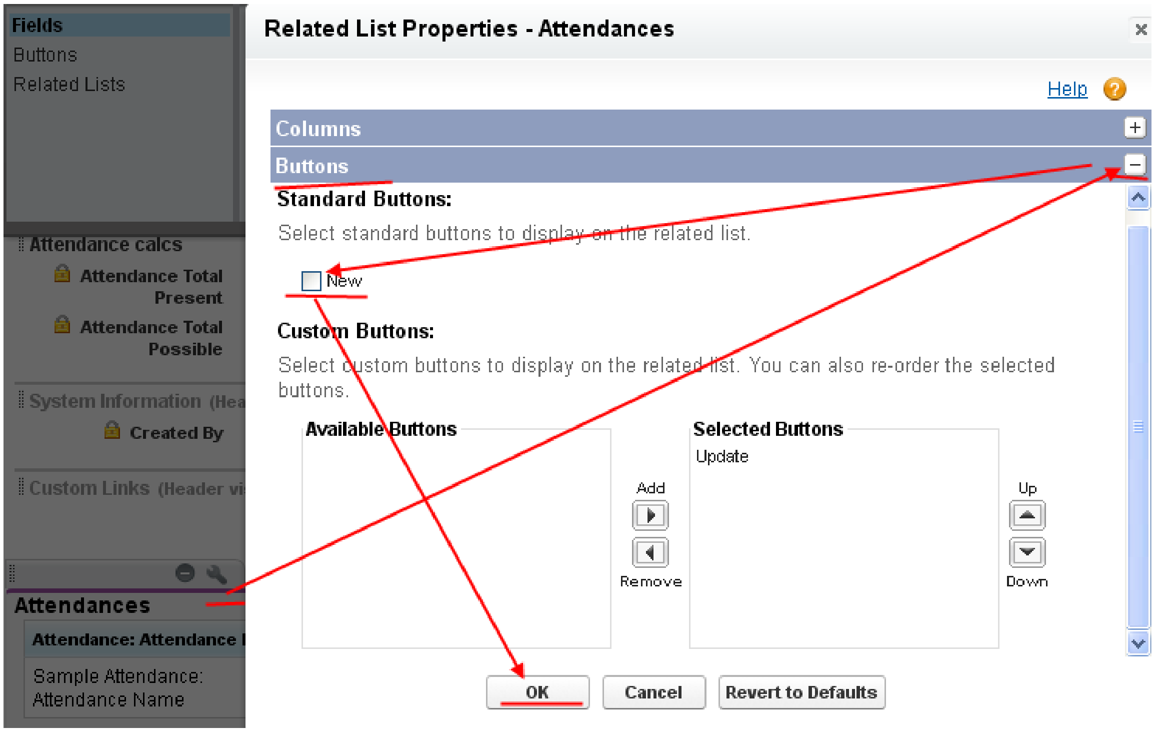
Set up like above, where "-Master-" is the default NO record type. Note this does not affect existing records.

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 the related "attendance" check the "new" button box and save.



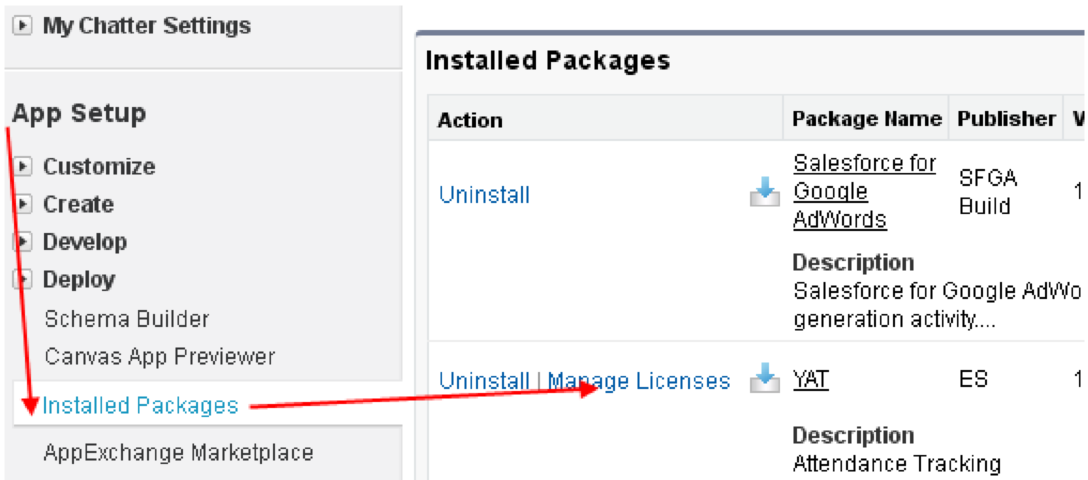
Now you have manual way to add attendance to a session.

New Customization for Version 1.7:

Setting up user licenses

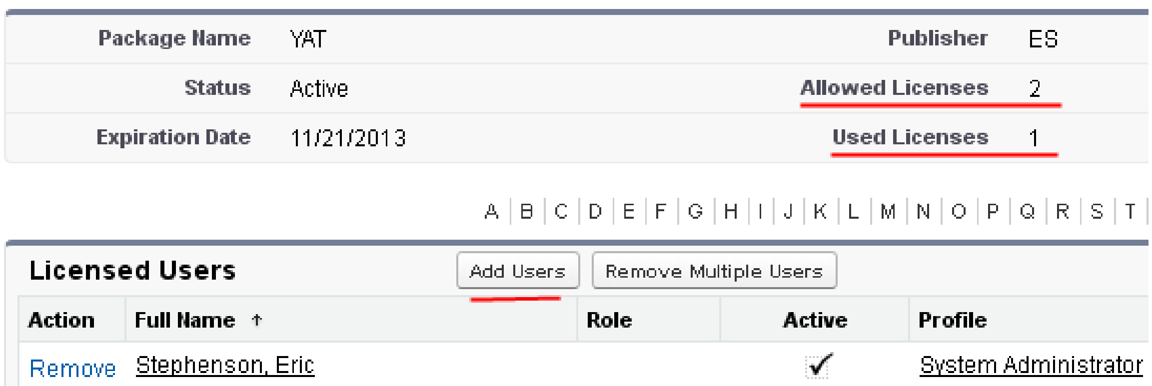
In an effort to make the pricing more economical and fair we will be offering a per user model. Those of you on the old model of a whole org have the option of switching to this new model or keeping the old model. With the old model you will not need to set licenses as the old model is for the entire 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

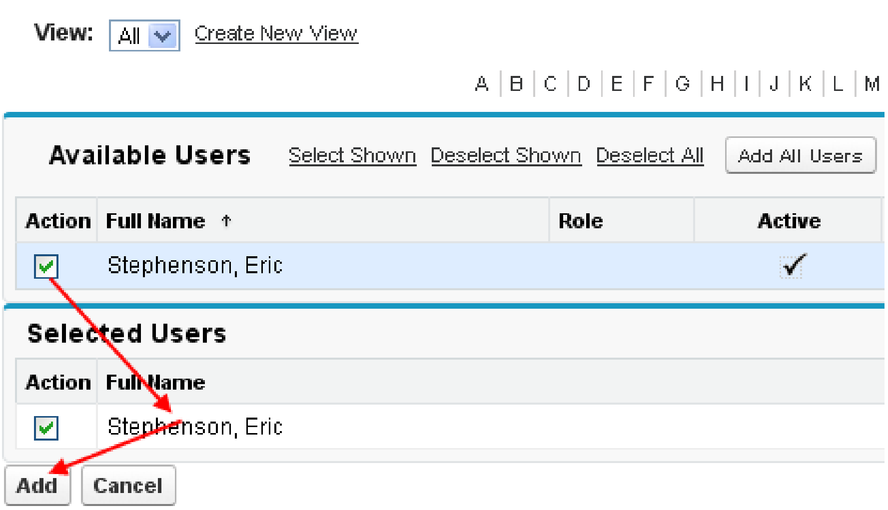


To add a user

Click add user



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



To remove a user

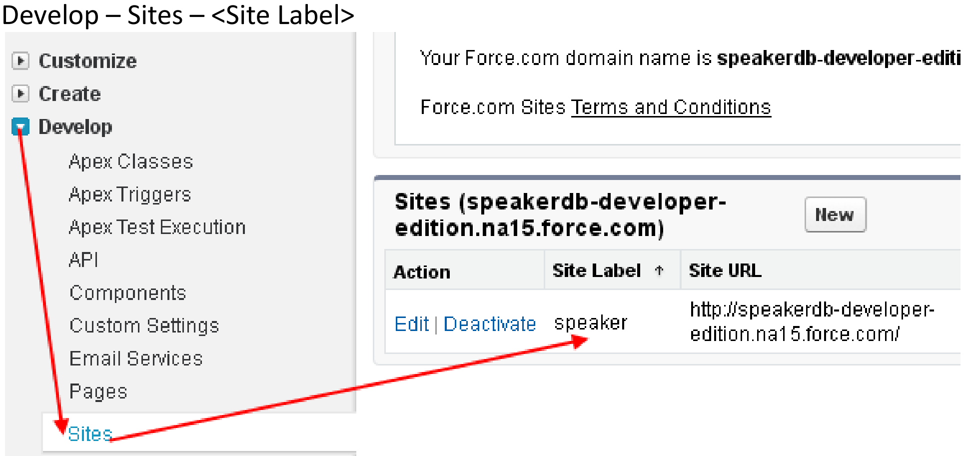
Click remove button for the user you want to remove

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>



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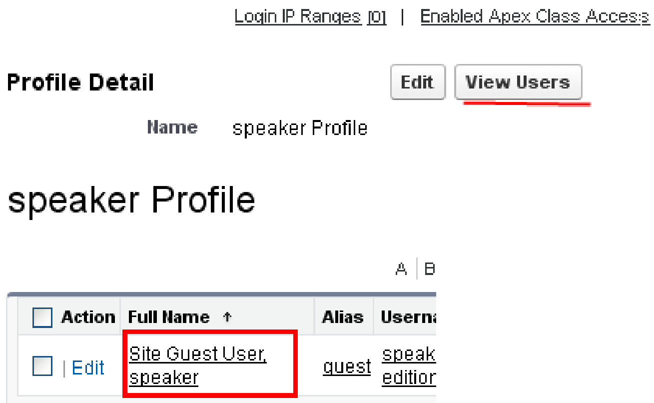
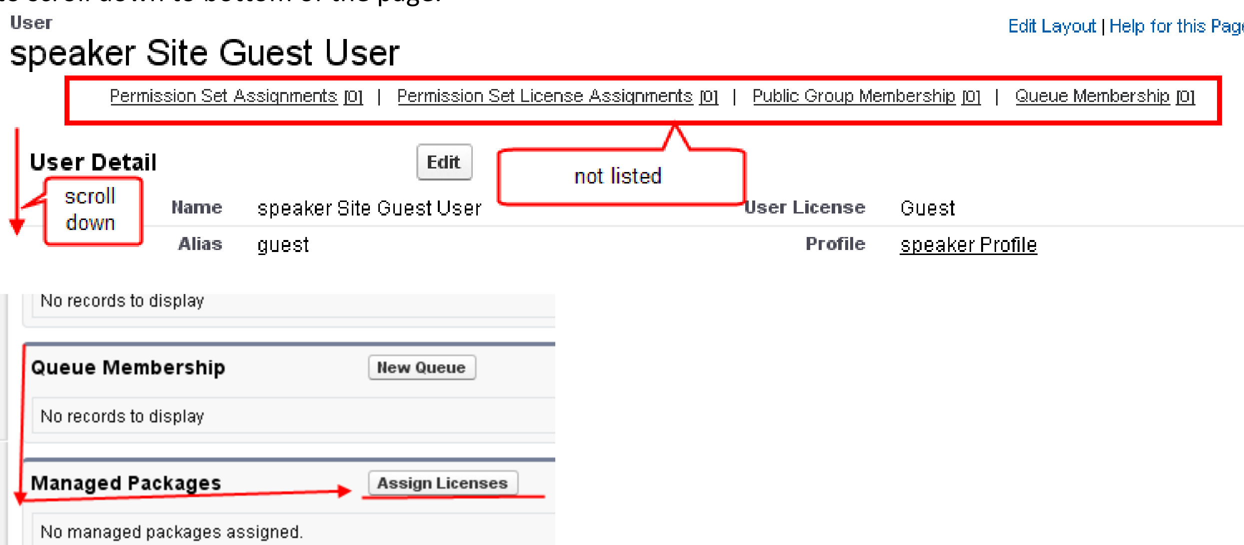
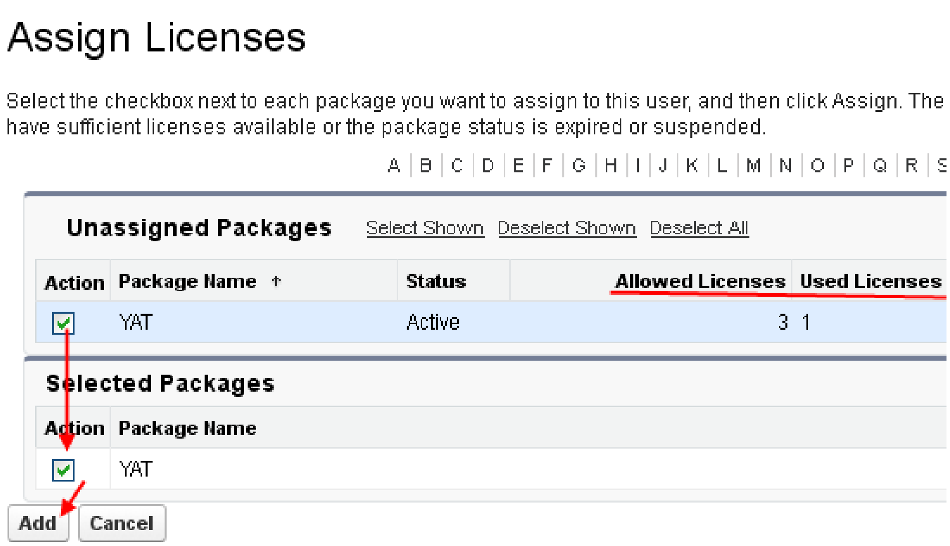


On the User record for the site the related list Manage Packages does not have a quick link so you need to scroll down to bottom of the page.





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. T his 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 re 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=PTsTtkvloo4

Written instructions:

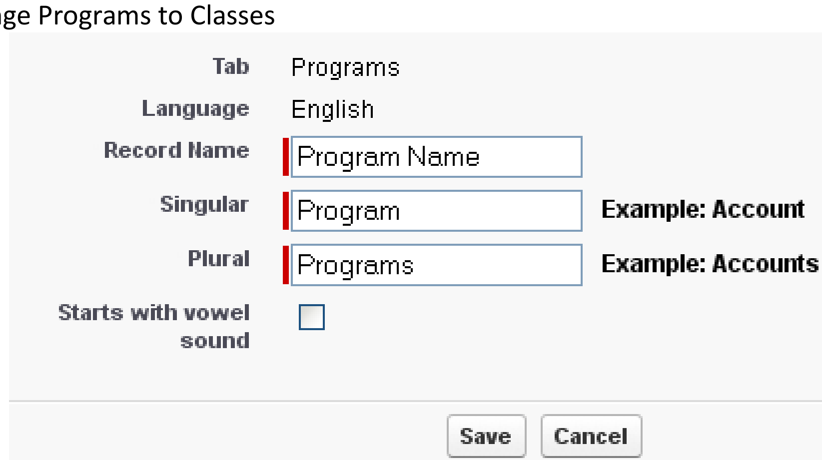
The object (includes Tab) and record name field:

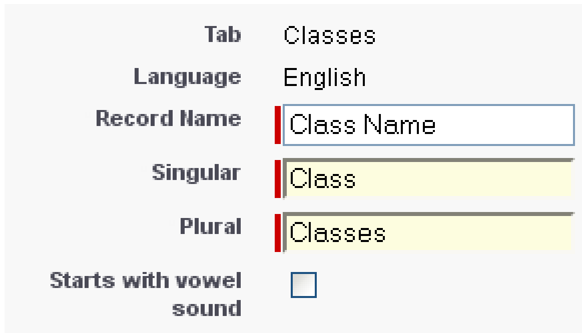
Under Setup

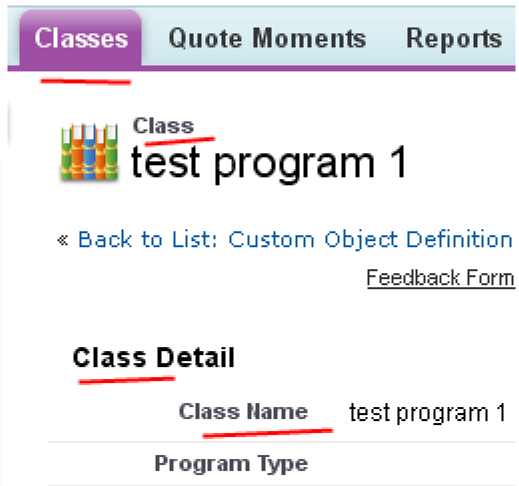
In App Setup – Customize – Tab Names and Labels - Renames Tab and Labels

Then select Edit for each object you want relabeled

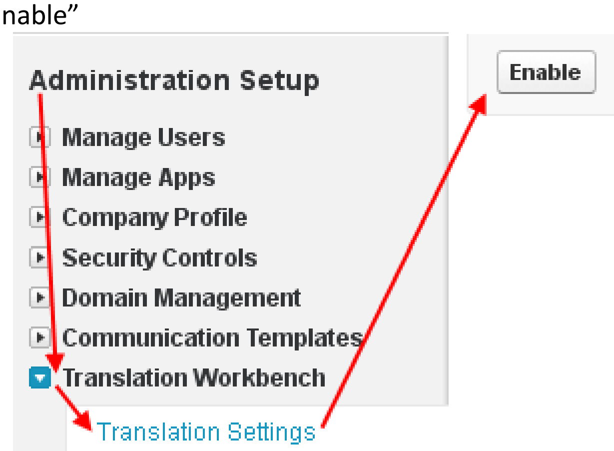
EX change Programs to Classes



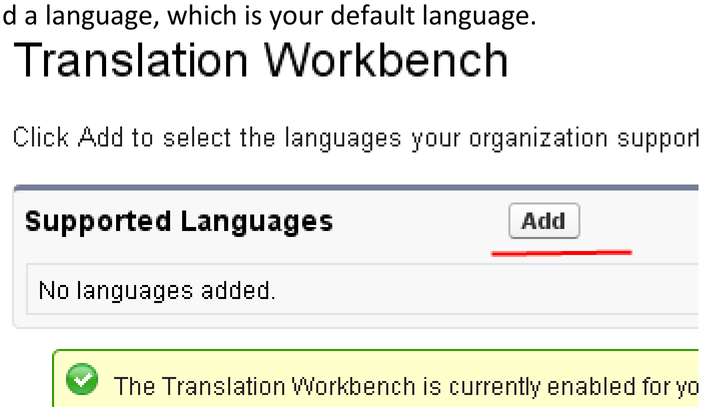


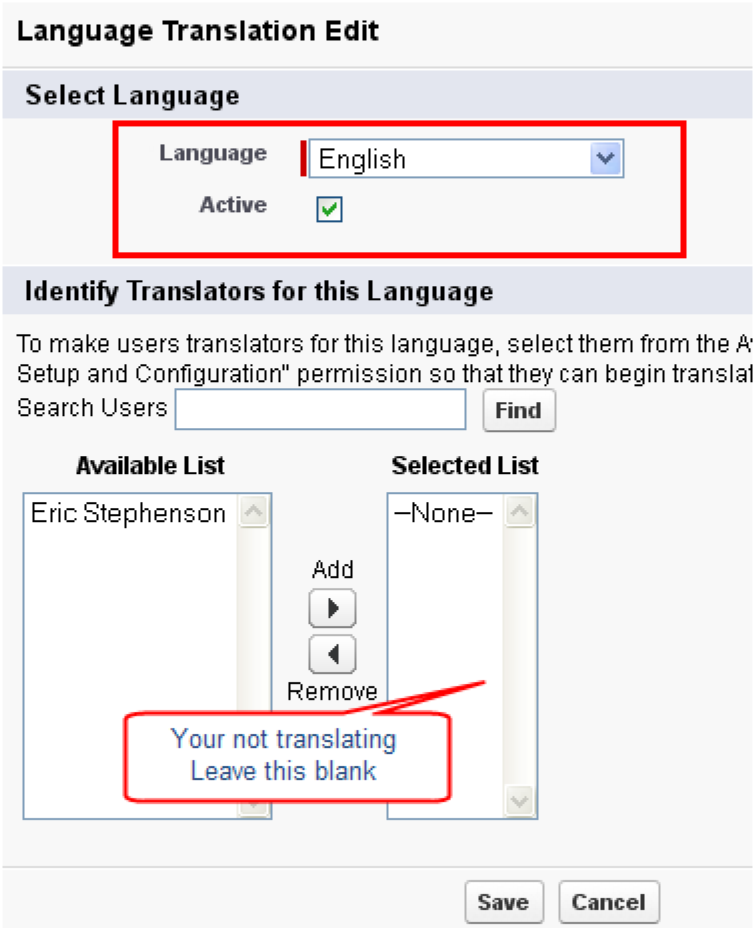


To override the rest of the app, use Translation Workbench:
Under Setup
In Administration Setup – Translation Workbench – Translation Settings
Click "Enable"

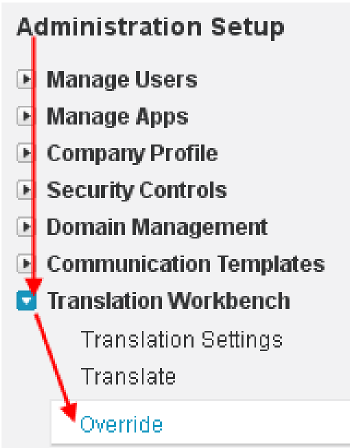


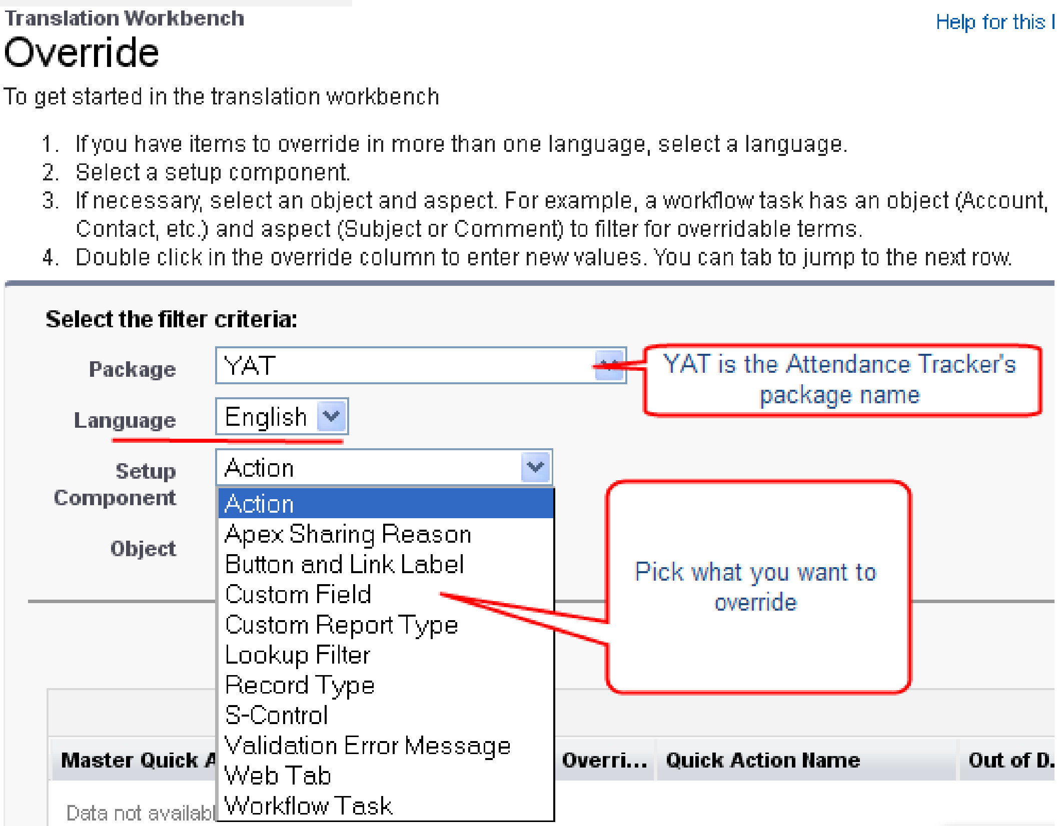
Then add a language, which is your default language.



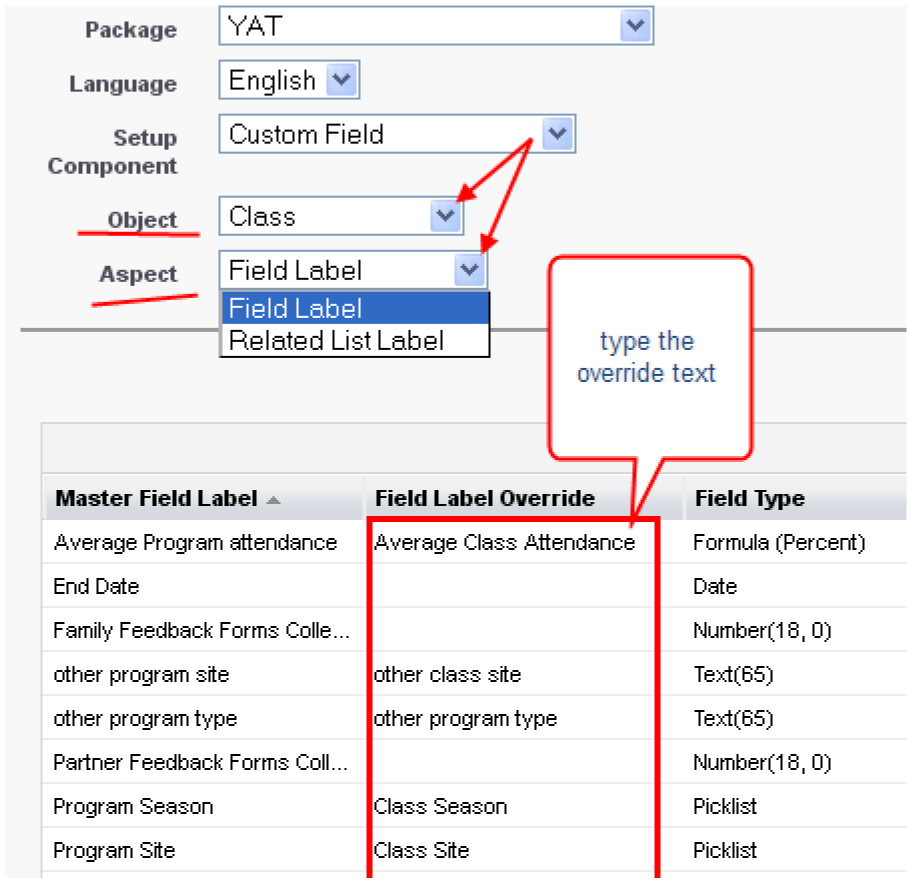


Now you can “Override” English for the rest of the app.





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



Rubric number field on attendances:

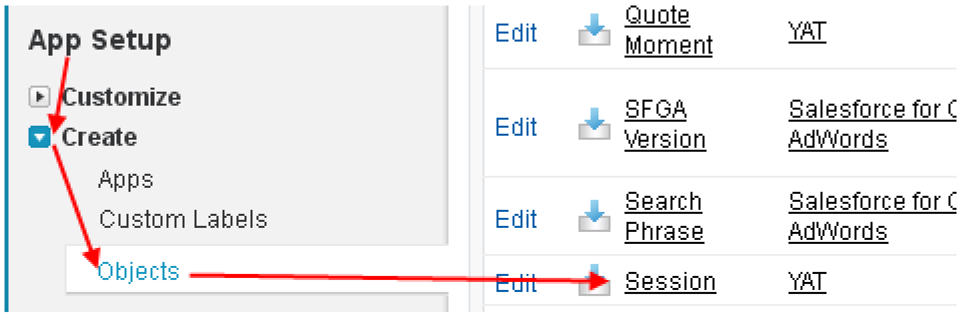
On attendances a new field for Rubric number, which can be used to track test scores or some other metric. This number can have up to 2 decimal places.

Default Value present

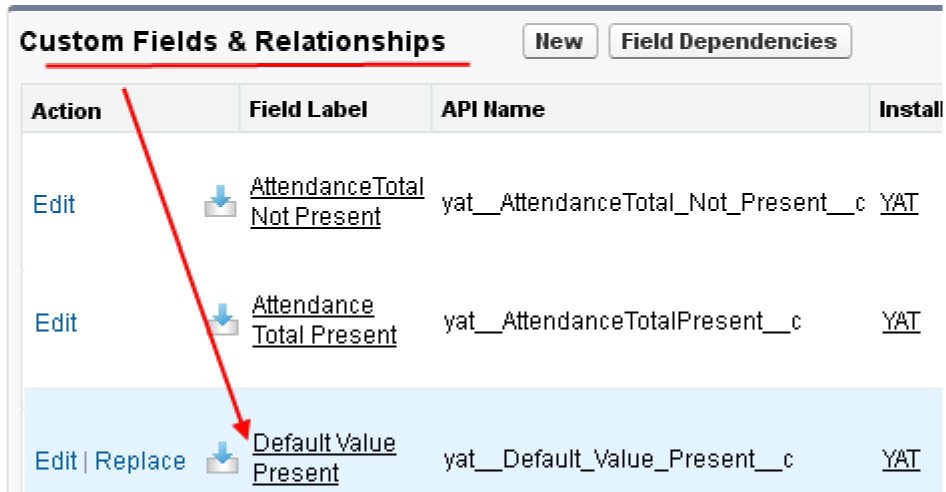
Now when you add a session, you can pick a default value for the attendances that are generated. This only affects the attendance when they auto created and does not update an attendance afterwards. Adding this field to a layout will allow your user to make this choice on when creating each session.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

Setting a Default Value present for all sessions

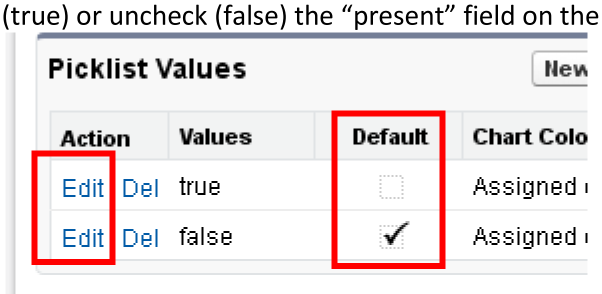
In set up
Under App Setup – Create – Objects
Click on “session”

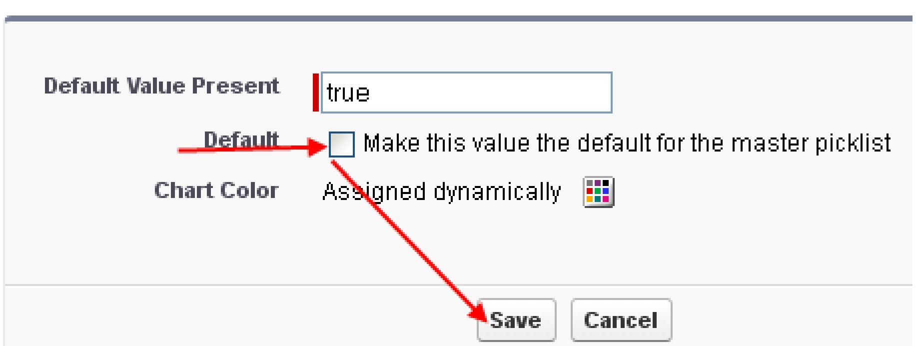


Then in “Custom fields & relationships” find “Default Value Present”



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.

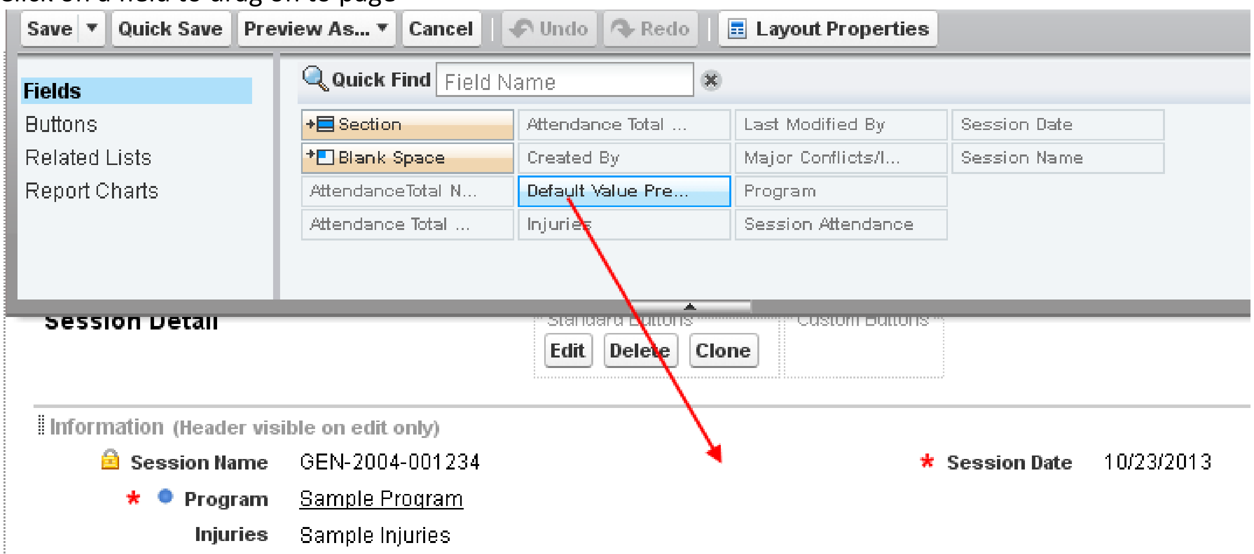




Adding a new field to a page layout

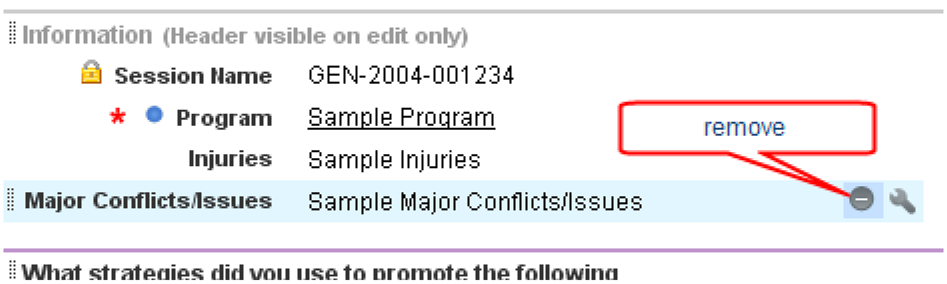
When upgrading to a new version, you may want to add new fields to a page layout or remove one.
Click edit Layout

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

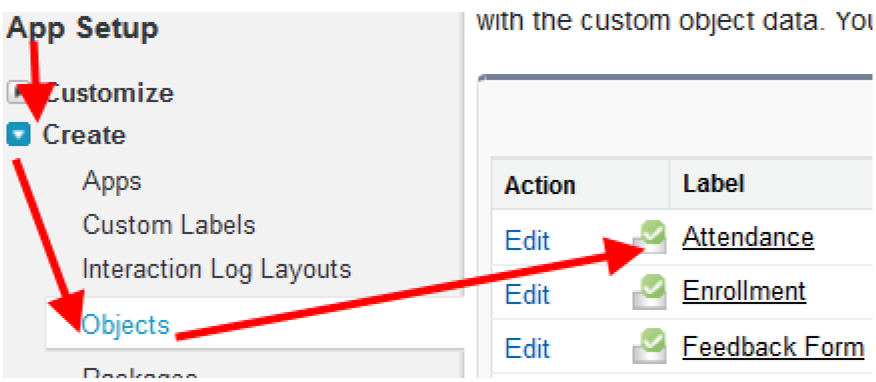
If you don't want to create Attendances when adding a new Sessions, then set the AttendanceOverRide field to "NoFire" before saving the session. Often this is useful if you are integrating with another system that creates attendances, or inserting new attendances using the dataloader.
Like with the "Default 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



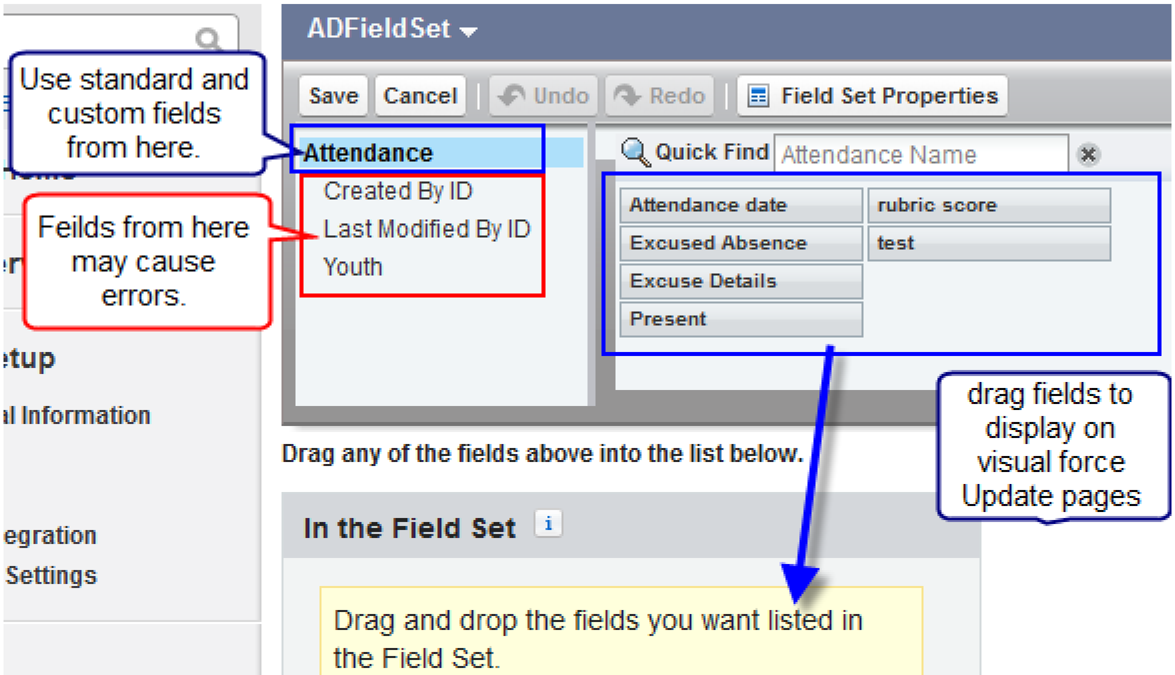
Then find the section for FieldSets and click the edit button to change the displayed fields.

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.

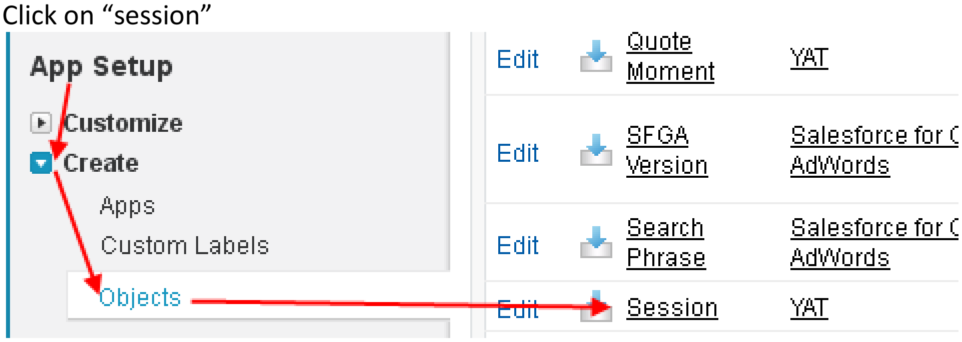
2 The new attendance UpdateFS page that you get to by using the “updateFS” button. This Update page is divided into 3 parts. From left to right is:
The “FS1_outputFields” FieldSets is for Non-Editable fields, which by default has the Session Name field for a link back to the Session record.
The “FS2_InputFields” FieldSets is for Editable fields that can be saved.
The “FS3_outputFields” FieldSets is for Non-Editable fields.



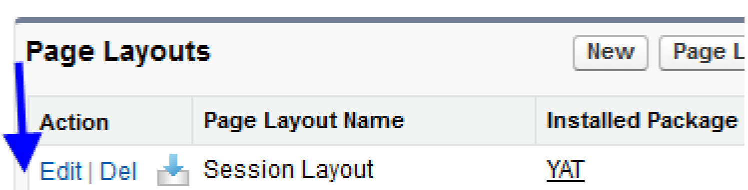
You can optionally leave any of these FieldSets blank.
If you create custom fields you can add them to the above FieldSets to include on either page.
These fieldSets are for Attendance fields ONLY, regardless of if Salesforce offers an option to add related fields. Instead of adding related fields, a formula field can be created on the Attendance object to display the related fields.

Displaying the update button

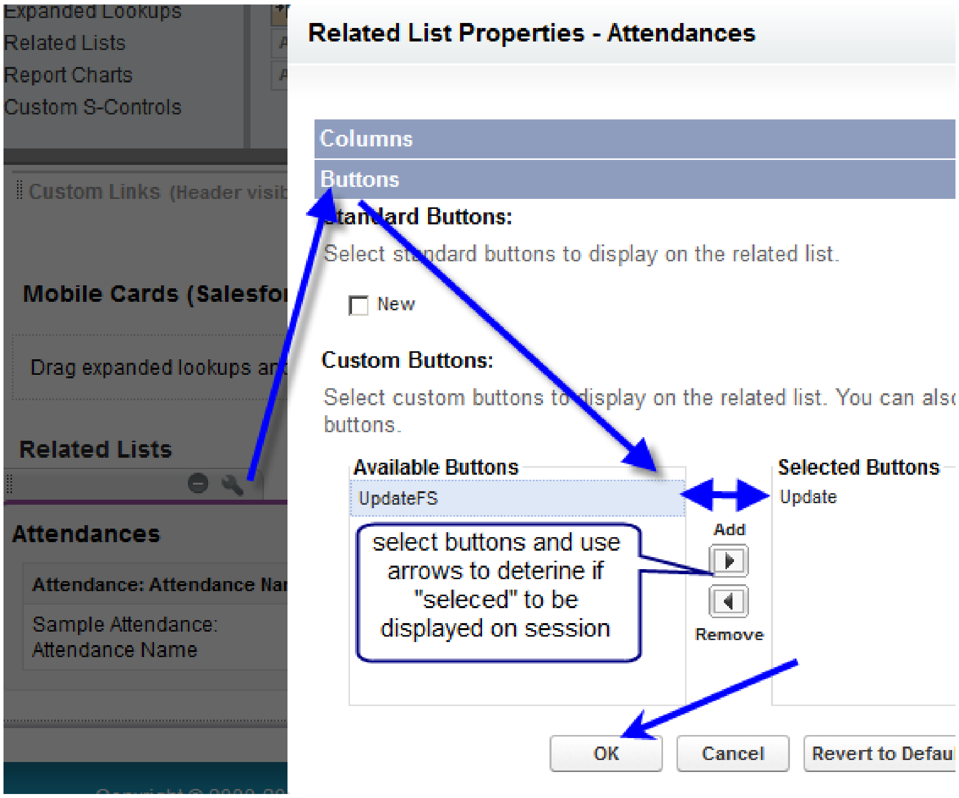
In set up
Under App Setup – Create – Objects
Click on “session”



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



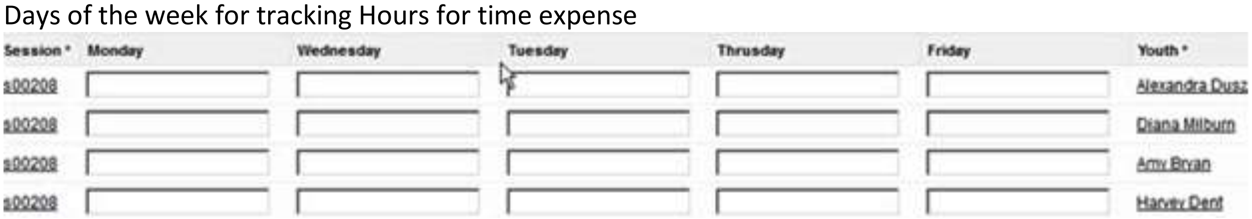
On the Page Layout, scroll down to the related Attendance Section and click the Wrench image. Then in the pop up “Related List Properties” page expand the “Buttons” section (near bottom), and use the arrows to “select” which buttons will be displayed to the users and click “OK” and then “save”.



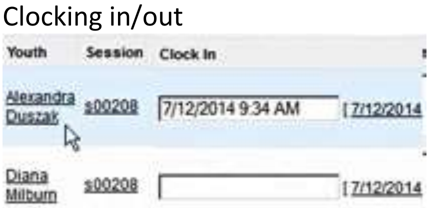
Example of FieldSet Uses

Example of FieldSet Uses:

Days of the week for tracking Hours for time expense



Clocking in/out

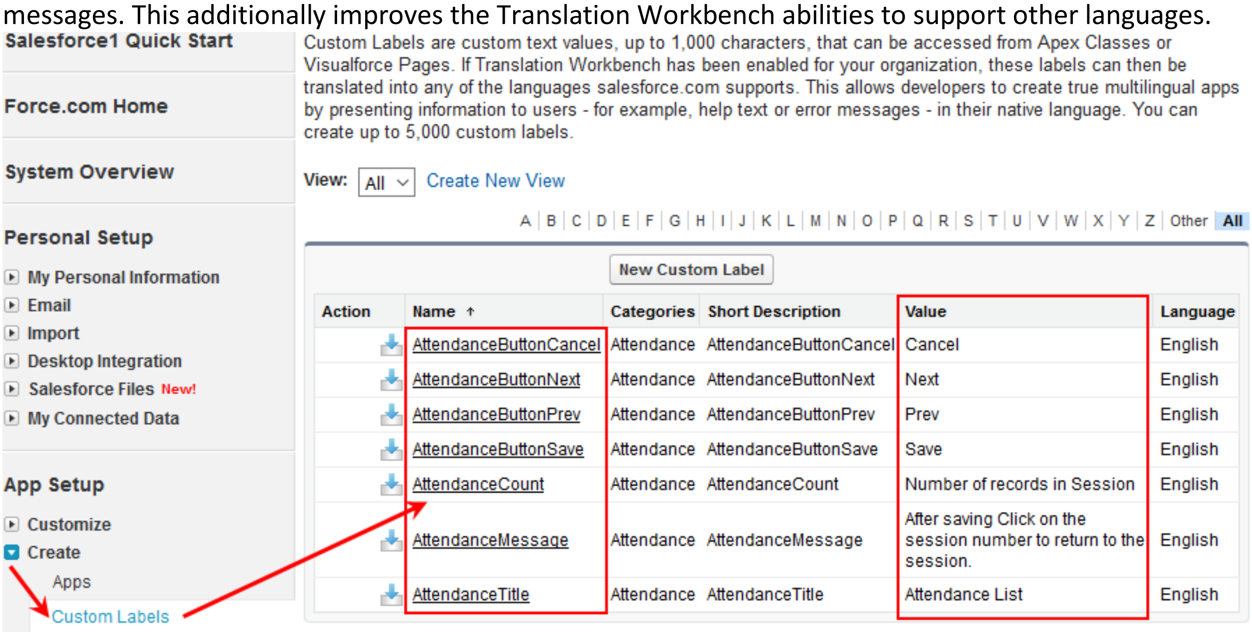


Days of the Month for reducing space used by attendances

New Customization for Version 1.11:

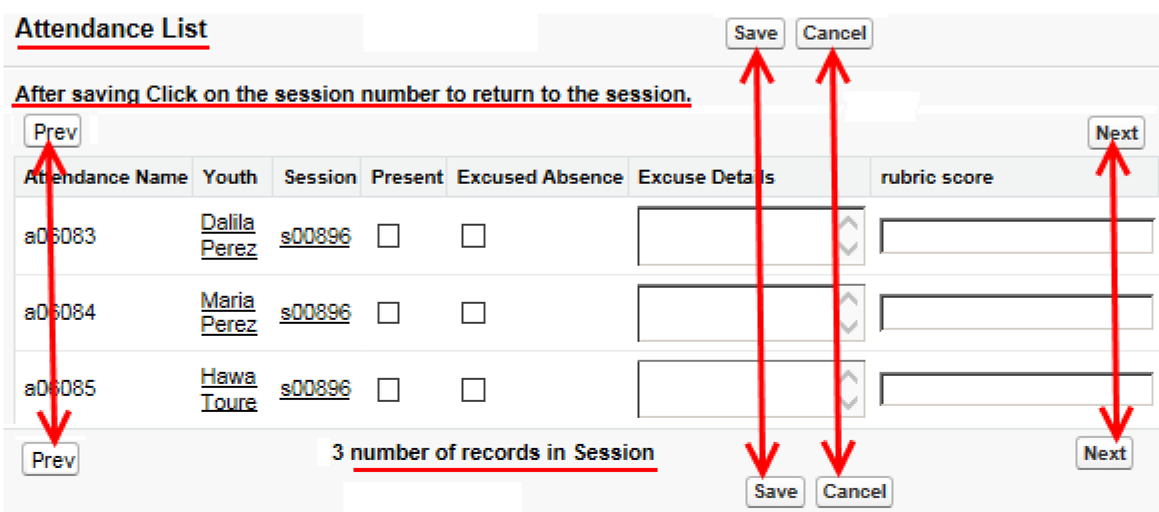
Custom Label for update attendance page

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.



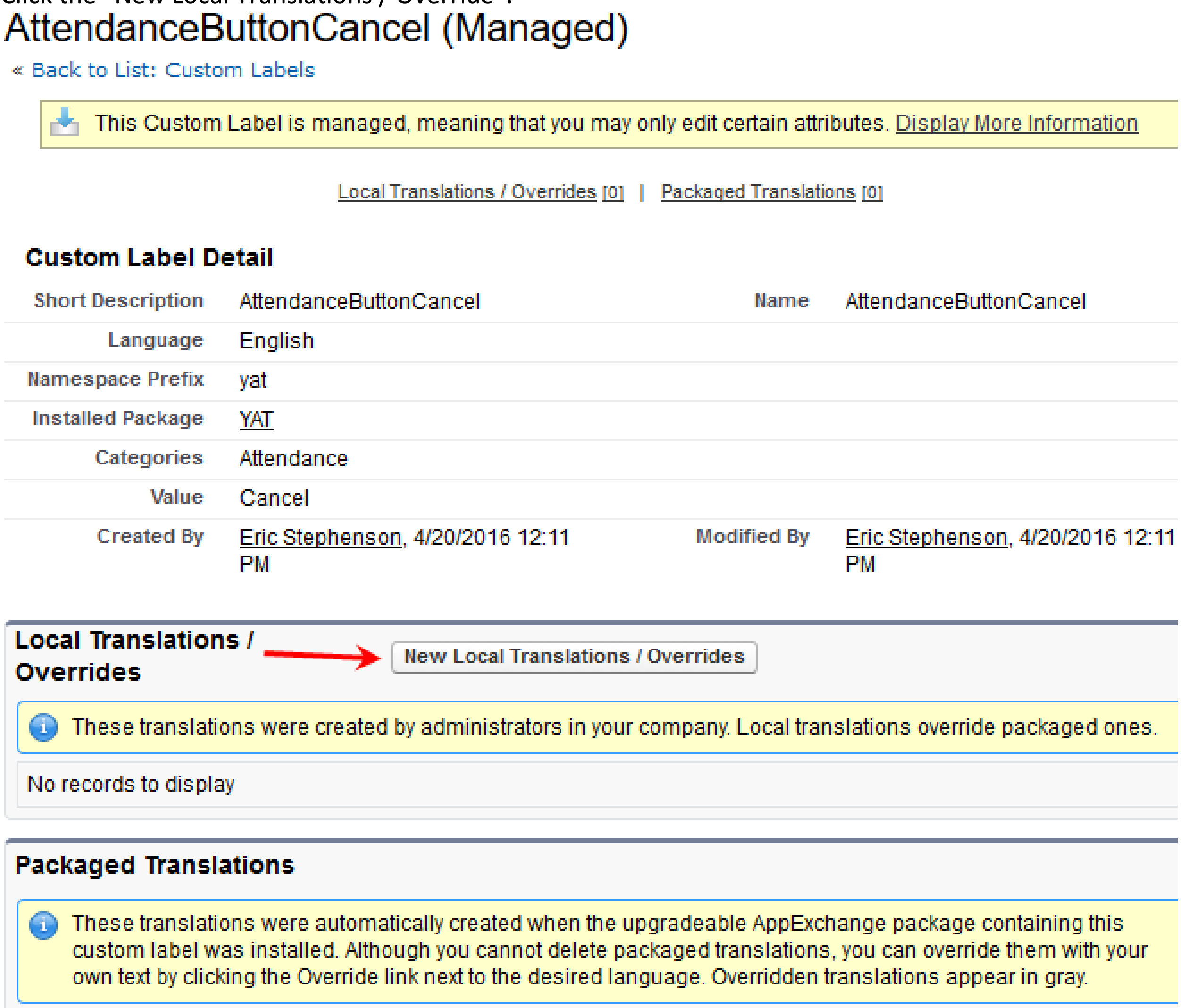
Action	Name ↑	Categories	Short Description	Value	Language
	AttendanceButtonCancel	Attendance	AttendanceButtonCancel	Cancel	English
	AttendanceButtonNext	Attendance	AttendanceButtonNext	Next	English
	AttendanceButtonPrev	Attendance	AttendanceButtonPrev	Prev	English
	AttendanceButtonSave	Attendance	AttendanceButtonSave	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.

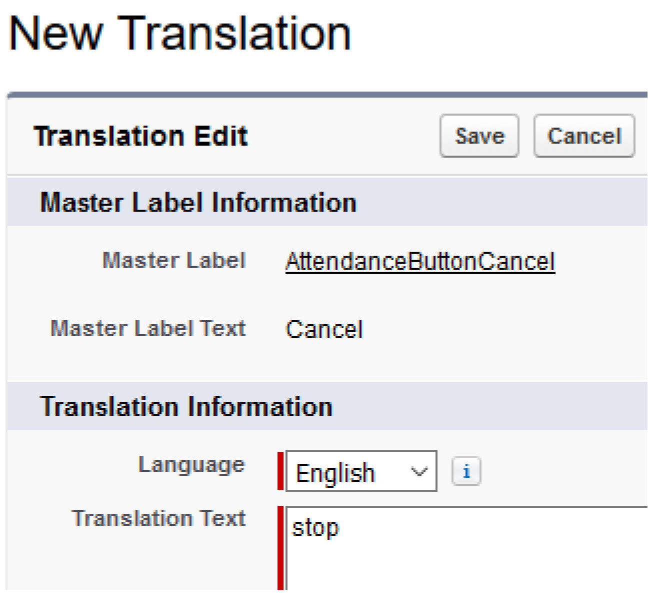


Click on the Name of the Custom label you want to change. *Note you must have already enabled the translation work bench in order to see the below button (also see above section on Overriding Labels to learn more about translation workbench and overriding labels).*

Click the “New Local Translations / Override”.



Select a language & type the new Translations / Override.

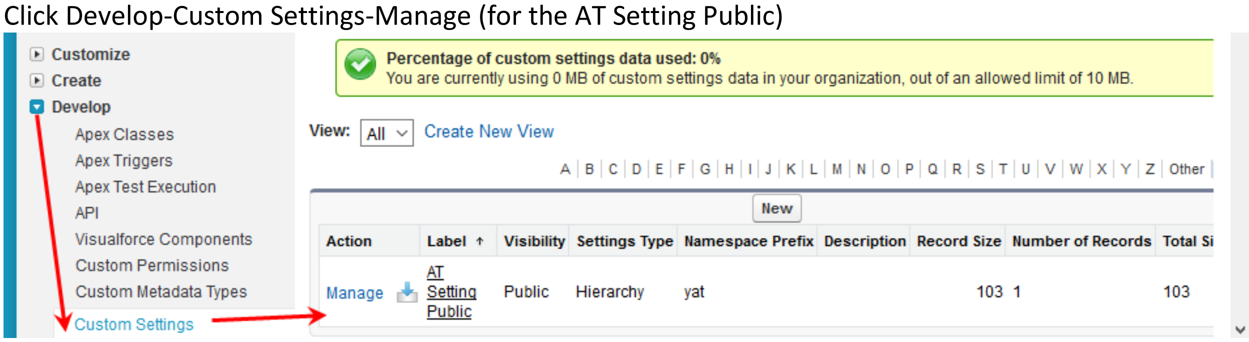


Check page, to see results.

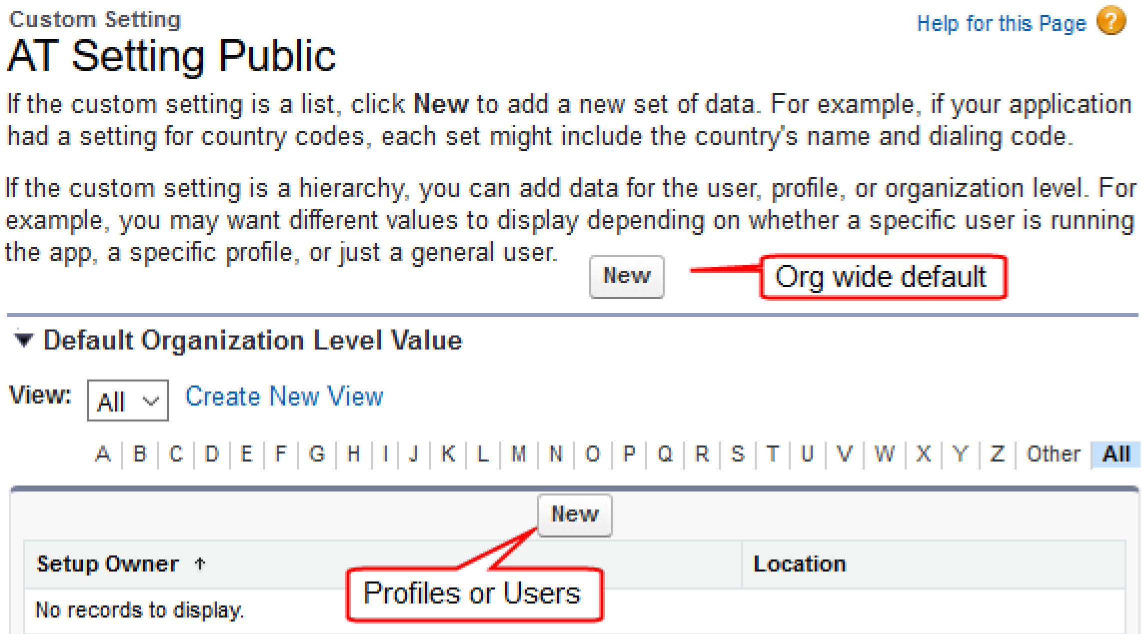
Limit return results for update attendance page

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.

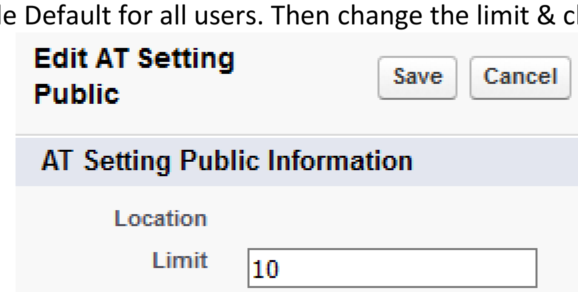
Click Develop-Custom Settings-Manage (for the AT Setting Public)



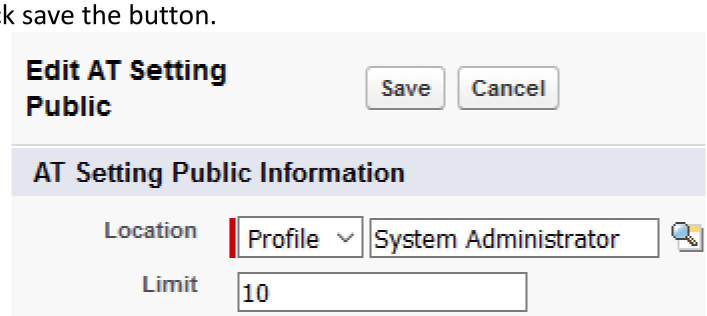
You can settings for the entire org or different settings for profiles or even different users. If you choose not to set this up then the old default is still 10.



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

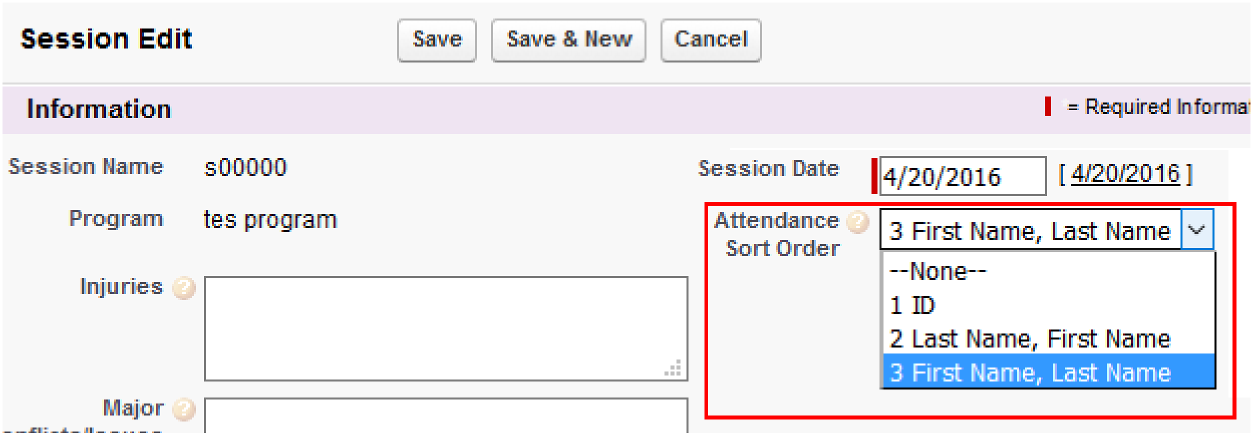


The org wide default can be overridden for Profiles & Users. Click new for Profile or Users then select either Profile or User from the location picklist & use the magnifying glass to look up the Profile or User. Change the limit & click save the button.

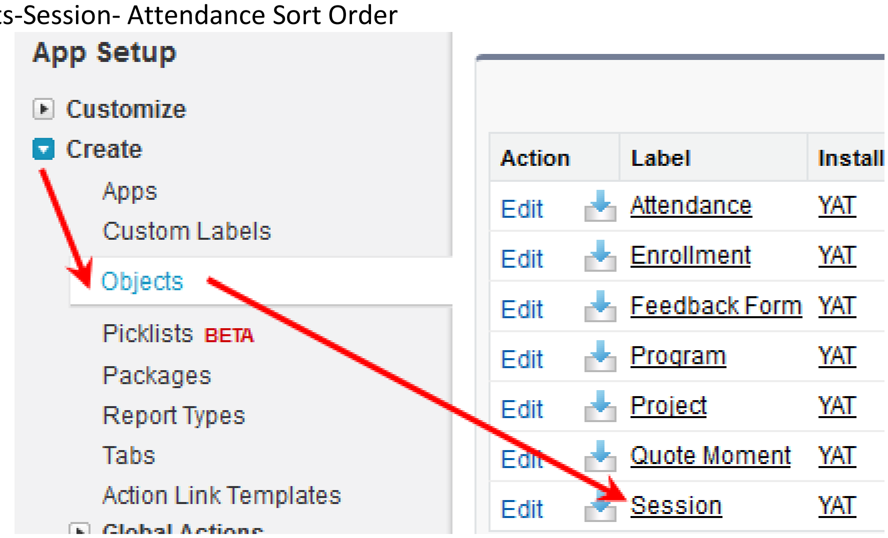


Alphabetical Sort Order for Update Attendances Pages

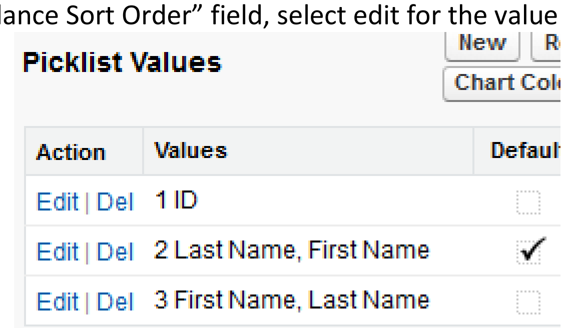
Now the Sort Order, for youth contacts on the update attendance page, can be sorted alphabetical by starting with either a First or Last name. By default, the update attendance page was not sorted alphabetical contact name, but now it can be.
This is controlled by the “Attendance Sort Order” field on the Session record. So users can control the sort order. (For older orgs you many need to add this field to the page layout.)



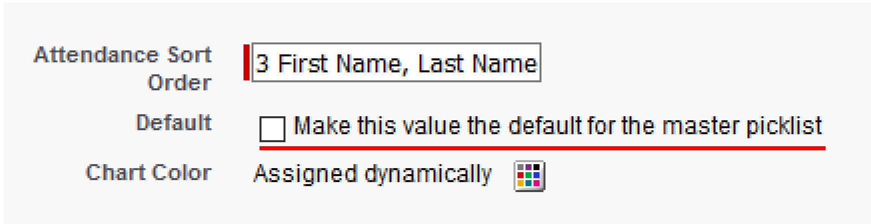
The default can be changed for new session's records for the entire org.
Find the "Attendance Sort Order" field under:
Custom Objects-Session- Attendance Sort Order



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



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



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.

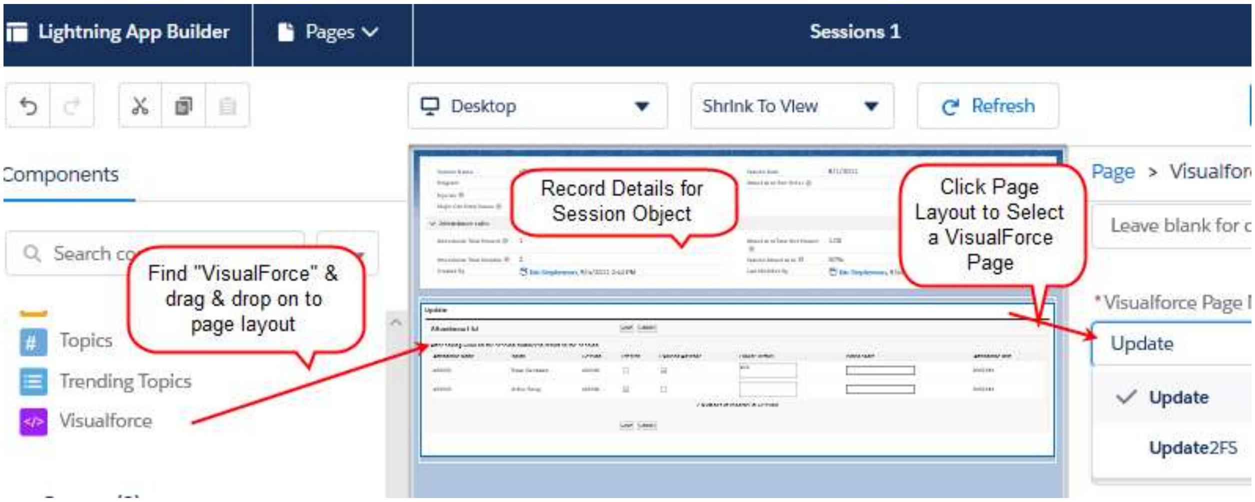
Lightning page with Related List for Sessions or I don't want a popup button

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. Therefor 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.

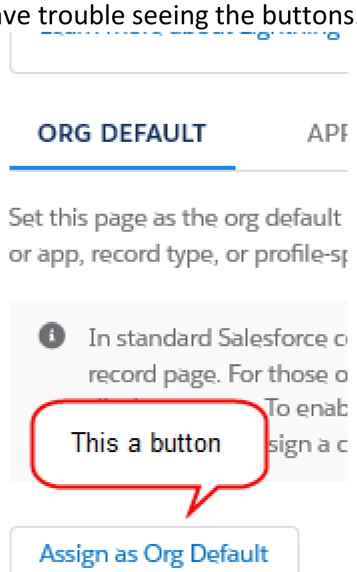
"Lightning app builder" uses existing salesforce page layouts for some things but does its own layout for other things. This results in hopping back and forth between app builder & page layouts. Additionally its got its own permissions so if you're not completely confused yet, let get started.

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 "Lighting 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.)

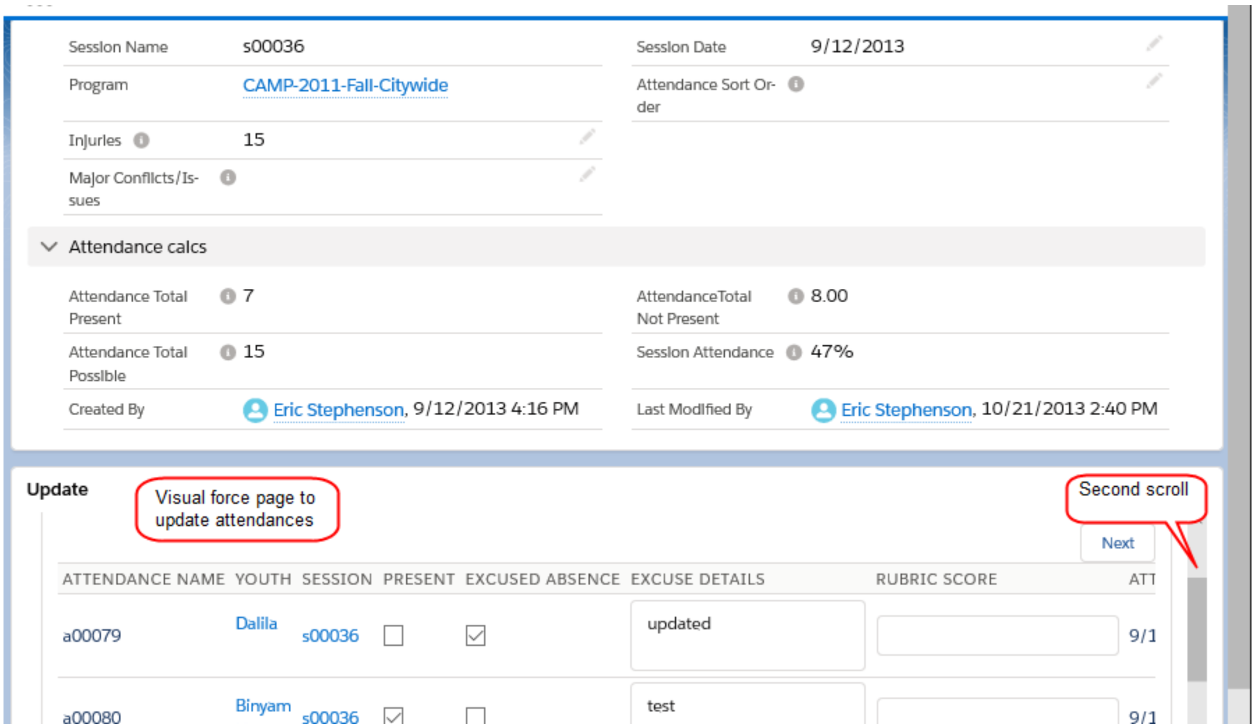


Lighting Page Permissions

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

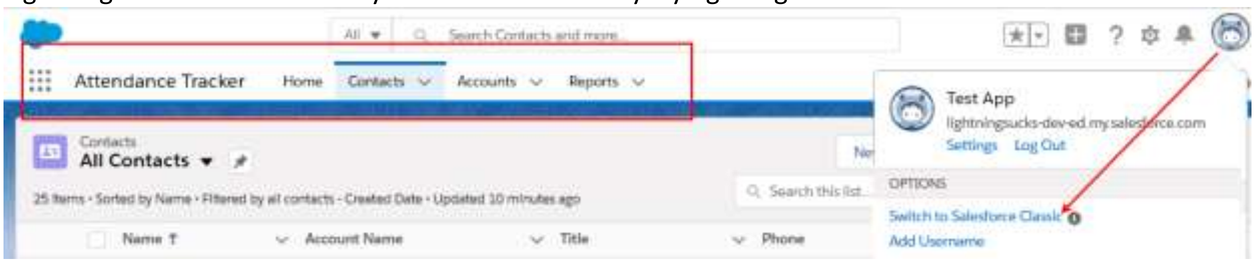


Also note that different browser may work differently and may require the browser to be refreshed but here's what we noticed:
After clicking "save," its recommended to refresh the page
Cancel was designed to return to the Session page by closing the Popup update page, in lighting page Cancel seems to 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.



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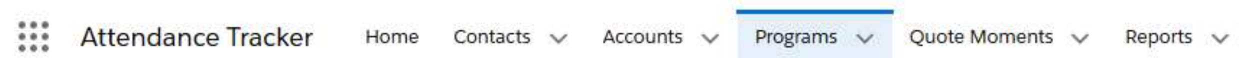


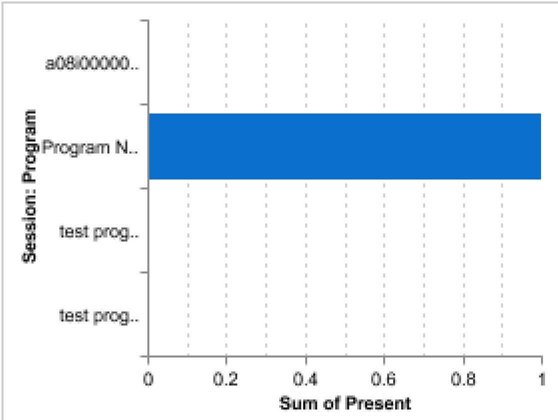
If you find more bizarre activity, report it Salesforce. They have dedicated support team that will try to pass us off their possibly intern program or as they prefer to call it trailhead Community. On a side note it is a violation of inter laws for a company to profit from an intern & the Supreme Court 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 an app exchange full of apps to enhance and build upon ours.

Grid Buddy for Attendance Tracker

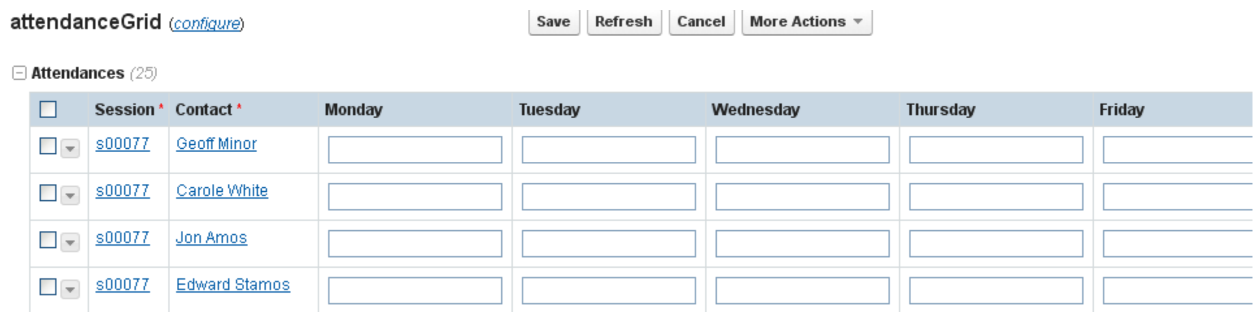
Attendance Tracker app has now has FieldSets on the update Attendances page. Fields Sets, allows the admin to pick the fields that show on a visual force page; however, you may have more complex needs then we have covered.

"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.

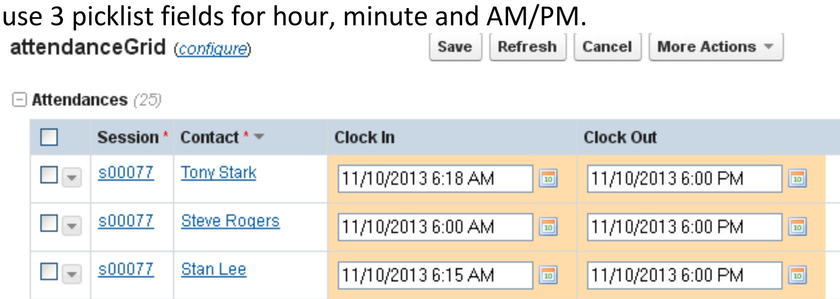
Grid Buddy has a paid edition and a free edition.
The free edition is limited to 5 user and 3 grids, where the grid is limited to 8 fields from an object (Attendances).
https://appexchange.salesforce.com/listingDetail?listingId=a0N300000055r6aEAA
The paid version allows you to have more users, grids and up to 40 fields.
https://appexchange.salesforce.com/listingDetail?listingId=a0N30000003IkInEAK

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).



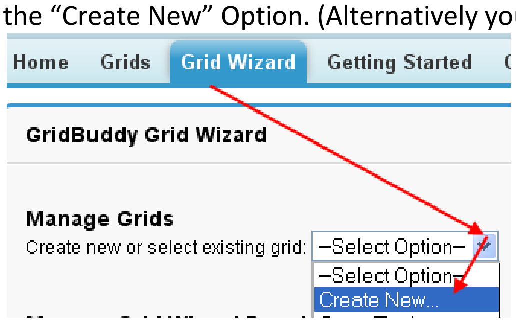
Clock In / Clock Out for tracking actual time worked, or tracking time lost due to lateness. If using the date time field I recommend set the default value to "Now()" if you plan on creating sessions on the day that you track attendance for. For project management you may have a lunch In/Out. Alternatively,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



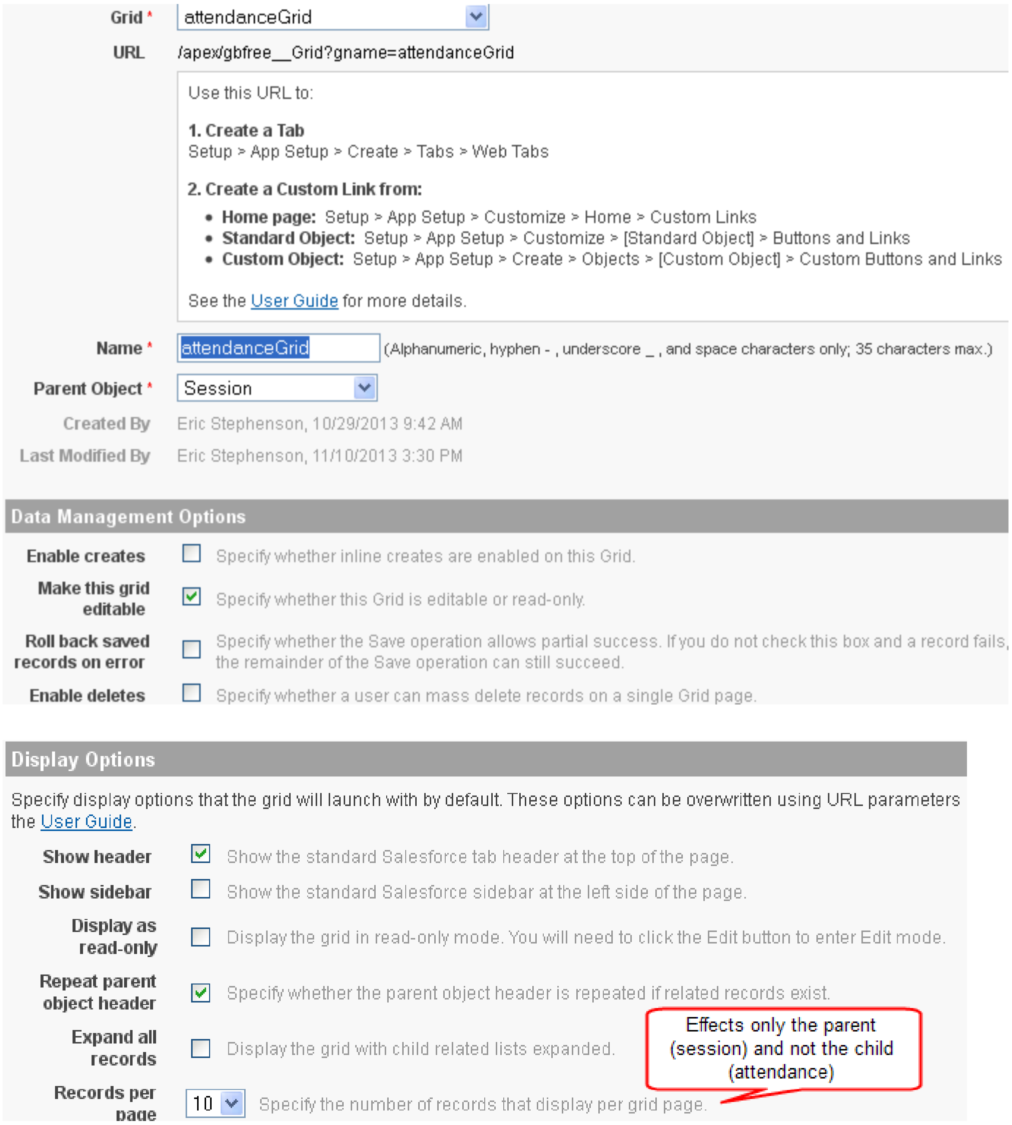
Replace the update attendances grid

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.)

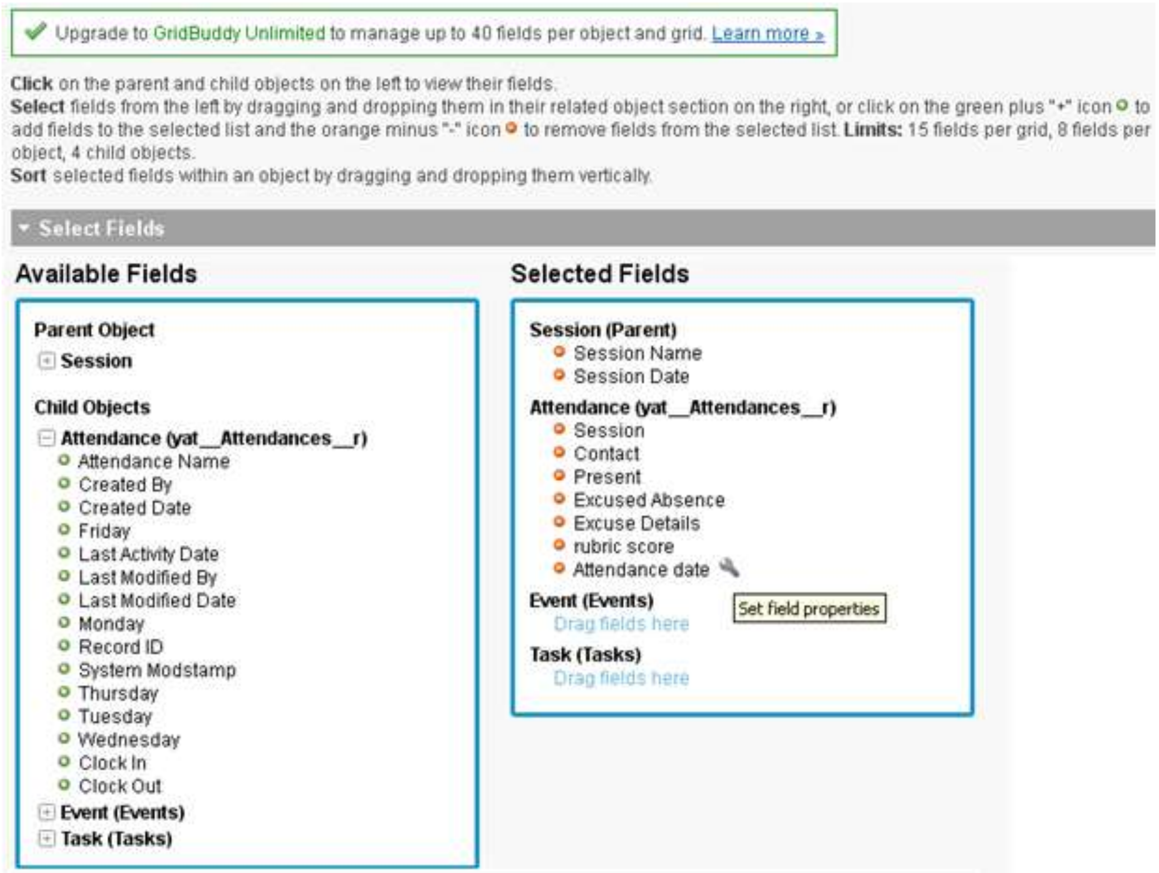


The main object is the Session (parent) so you can drill into the Attendance (child). Later we will create a button that will pass the session ID, to filter the grid for attendances for just 1 session. Here is how I set up step 1 of the grid wizard.



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.

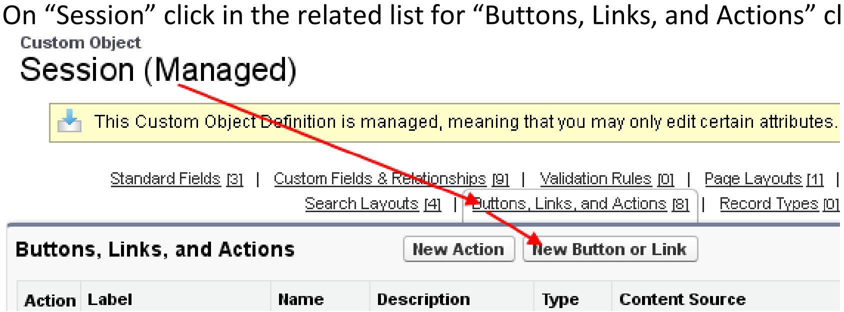


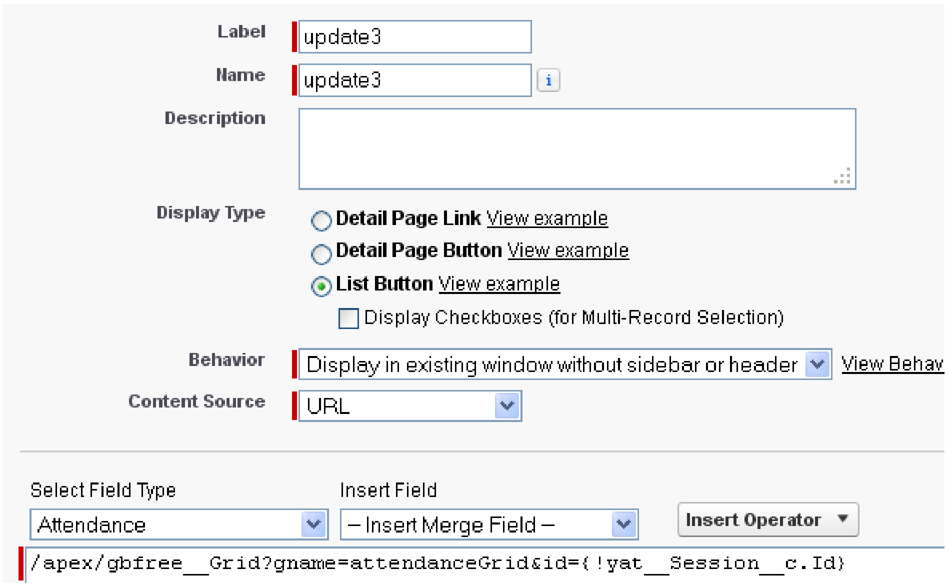
Step 3 is not important.

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}

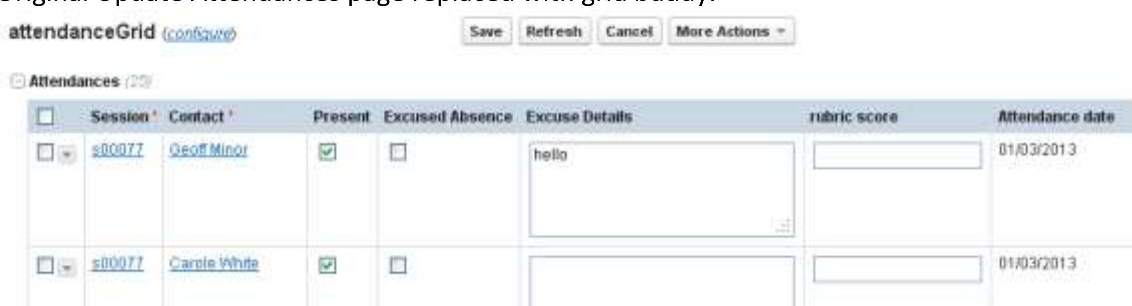
Then on Session create a button.
Under setup – Create – Objects
On "Session" click in the related list for "Buttons, Links, and Actions" click "New Button or Link"





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.



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.

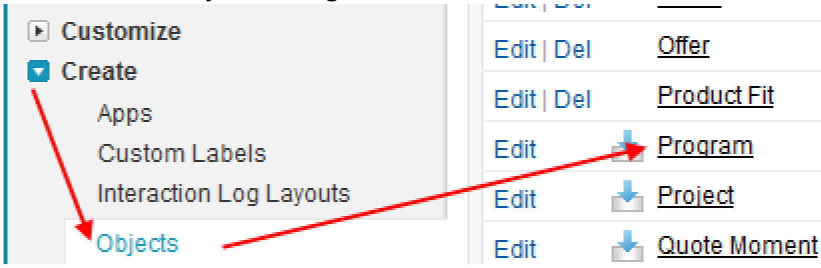
Because this app is unmanaged it will not work on Professional Edition or lower, it we receive large interest from lower editions then we will consider making this part of attendance tracker but for now this existing app fits the need of our current user base.

Link to Clone Related List
https://appexchange.salesforce.com/listingDetail?listingId=a0N30000004cbbDEAQ&tab=r
Demo Video:
http://youtu.be/duwf56IY0bg

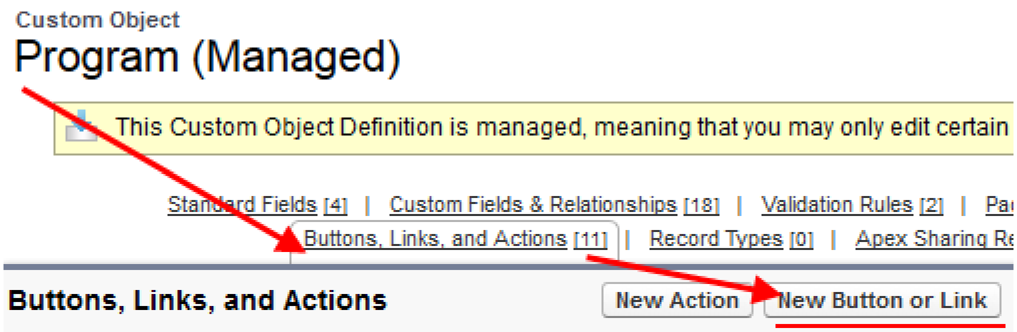
Creating a button for cloning a program

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.

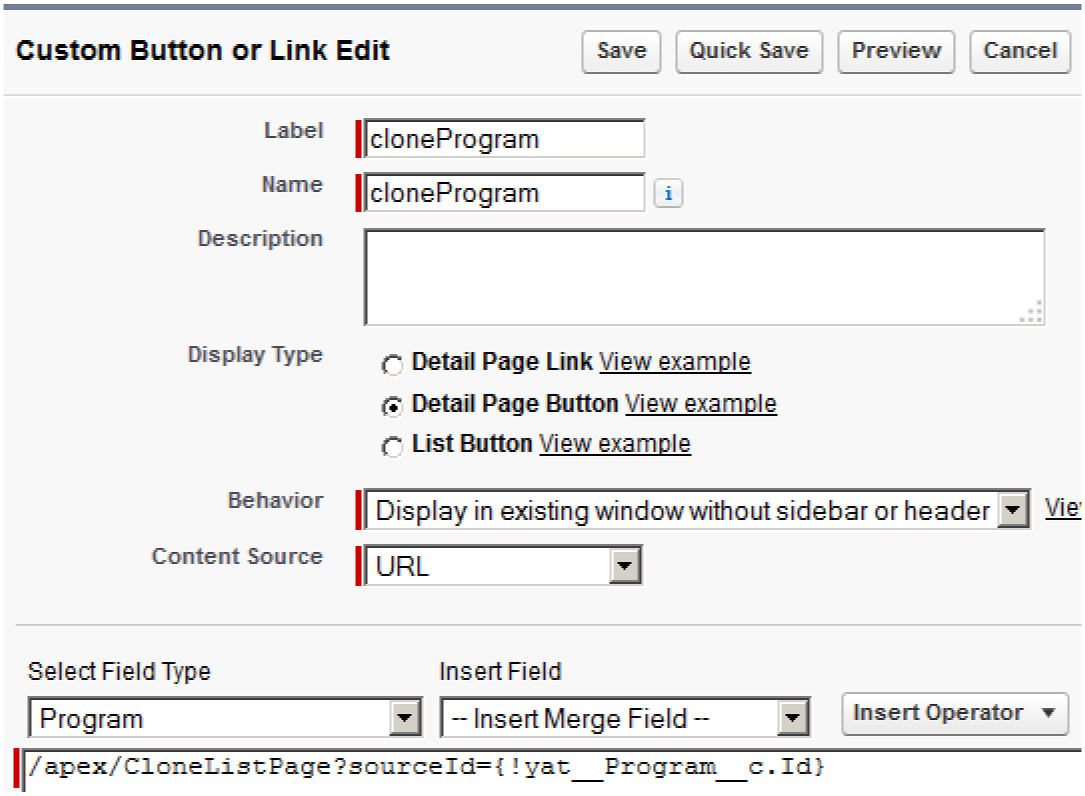
In setup under App Setup or Build
Click Create – Objects - Program



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

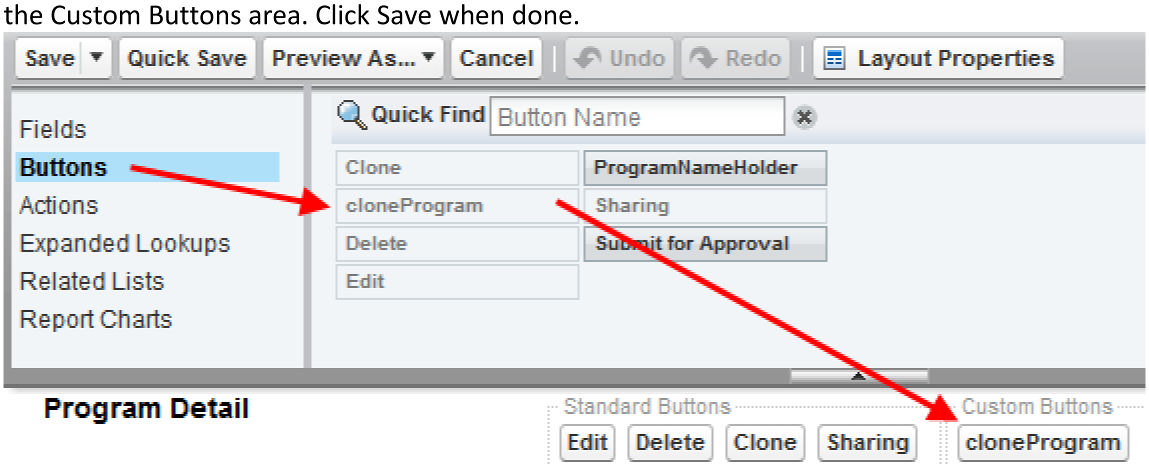


Create a button like below.



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.

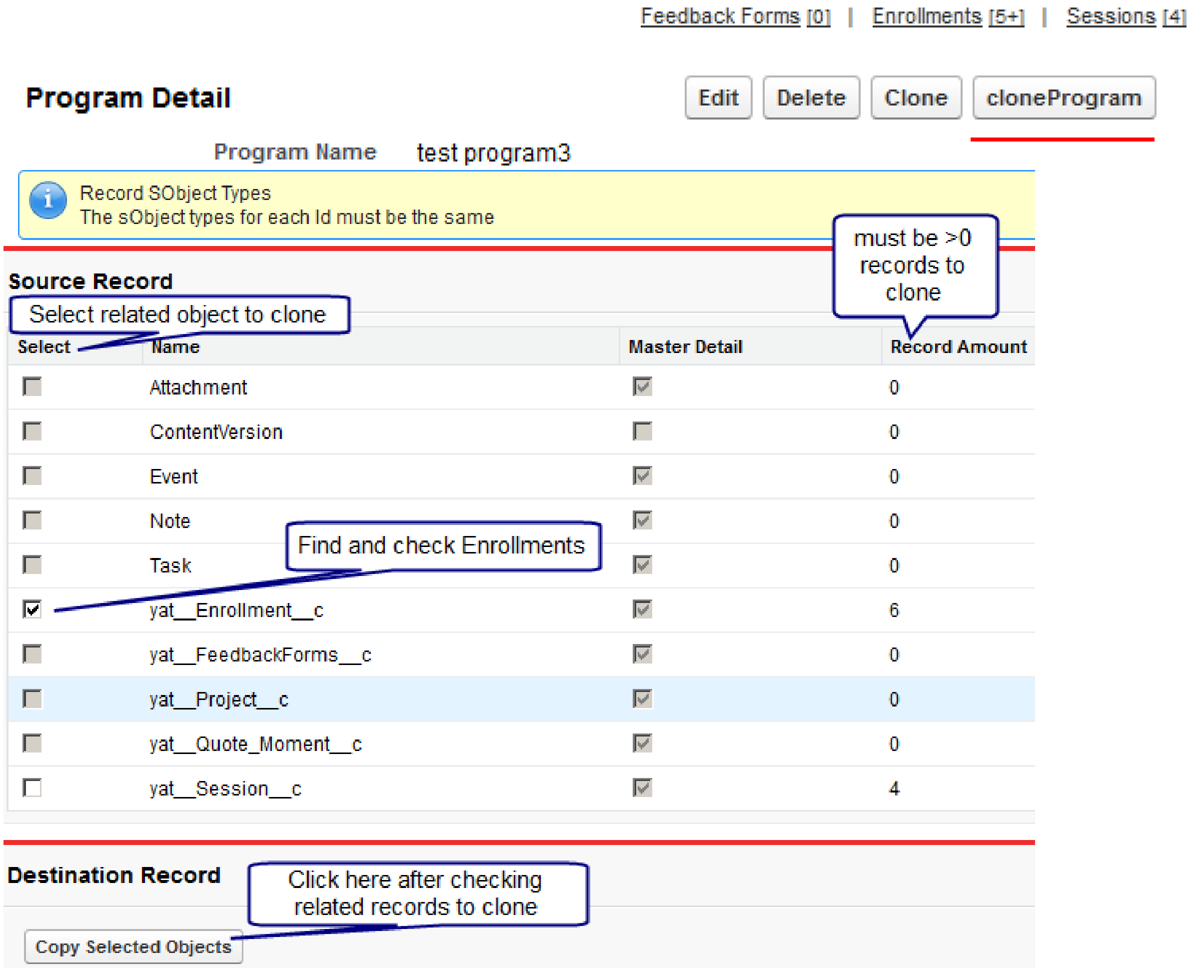
Then add the button to the layout. By finding the section for "Page Layouts" on the Program Object and clicking edit.
Then on the page Layout, use the "Buttons" to find and drag the cloneProgram button you created into the Custom Buttons area. Click Save when done.



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 then, 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.



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 **<u>will not change the API name</u>** so you may need to train users on this.