

‘Check-in App’**Managed Package Guide Version 1.2**

March 2021

About ‘Check-in App’

Employees, visitors and guests can use their own mobile device to check-in and check-out by scanning a QR code and completing their registration. The solution is configurable to meet your specific requirements:

- Add your own branding banner
- Personalised messaging
- Screen for specific data and questions
- QR Codes for multiple locations
- Check-in and Check-out Activity creation against existing or new Contacts / Leads
- Allow contacts to upload their photos
- Hyperlink to a list of resources, for example, hotspot areas
- Hyperlink to the Terms & Conditions and Privacy Policy pages
- Add Guests when Checking-in
- Flag for check-in screening based on answers
- Email confirmations sent for check-in
- Automated check-out reminders
- Check-in and check-out from calendar invite using secure tokenised URL
- Reports for contacts checked-in and out for compliance

Document Contents & Scope

This document provides installation and outlines the fields returned by the service.

- The intended audience for this document is salesforce.com aware Business Analysts, Systems Analysts, Developers and Administrators.

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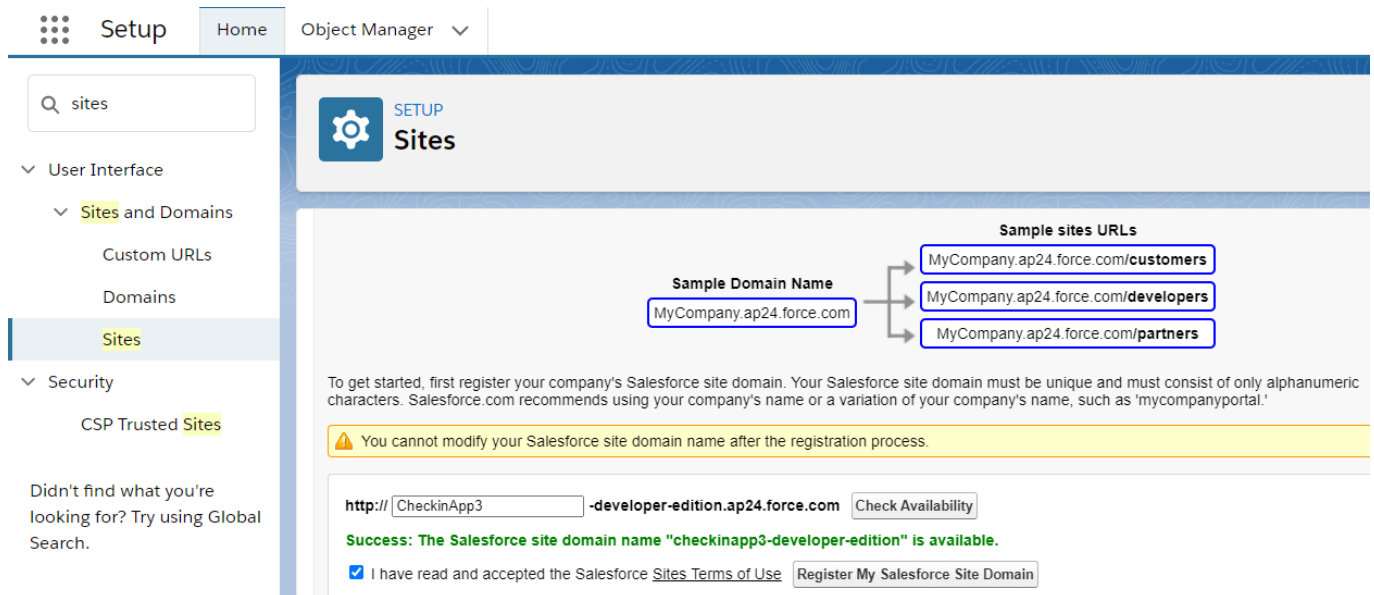
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Preparation for Installing Check-in App

Create the Site Domain

To get started using Salesforce Sites, from Setup, enter **Sites** in the Quick Find box, then select **Sites**. From this page, you can:

1. Register your Salesforce Sites domain, (you have not already set one up for your business)
2. Type in your preferred Site Domain Name
3. Click on the **Check Availability**
4. Check the box for Terms of Use
5. And click on the **Register my Salesforce Site Domain** button



Setup Home Object Manager

Q sites

User Interface

Sites and Domains

Custom URLs

Domains

Sites

Security

CSP Trusted Sites

Didn't find what you're looking for? Try using Global Search.

SETUP Sites

Sample sites URLs

Sample Domain Name: MyCompany.ap24.force.com

MyCompany.ap24.force.com/customers

MyCompany.ap24.force.com/developers

MyCompany.ap24.force.com/partners

To get started, first register your company's Salesforce site domain. Your Salesforce site domain must be unique and must consist of only alphanumeric characters. Salesforce.com recommends using your company's name or a variation of your company's name, such as 'mycompanyportal.'

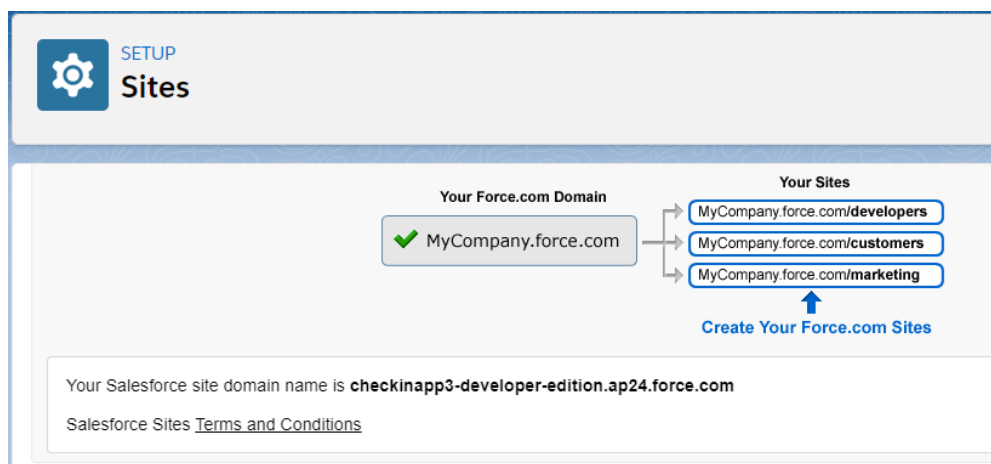
You cannot modify your Salesforce site domain name after the registration process.

http:// CheckinApp3 -developer-edition.ap24.force.com Check Availability

Success: The Salesforce site domain name "checkinapp3-developer-edition" is available.

☒ I have read and accepted the Salesforce [Sites Terms of Use](#) Register My Salesforce Site Domain

Congratulations, you now have the Site Domain Registered and ready to download your copy of the Check-in App from the App Exchange.



SETUP Sites

Your Force.com Domain

MyCompany.force.com

Your Sites

MyCompany.force.com/developers

MyCompany.force.com/customers

MyCompany.force.com/marketing

Create Your Force.com Sites

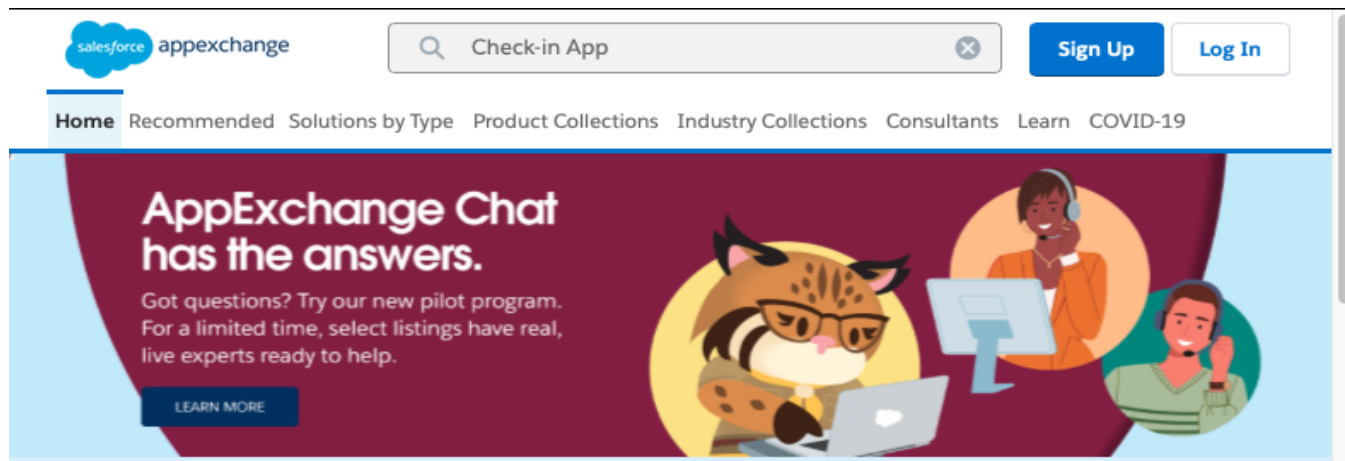
Your Salesforce site domain name is checkinapp3-developer-edition.ap24.force.com

Salesforce Sites [Terms and Conditions](#)

Installing the Check-in App

Installation of the 'Check-in App' to your Production, Developer or Sandbox Org is via the **AppExchange**.

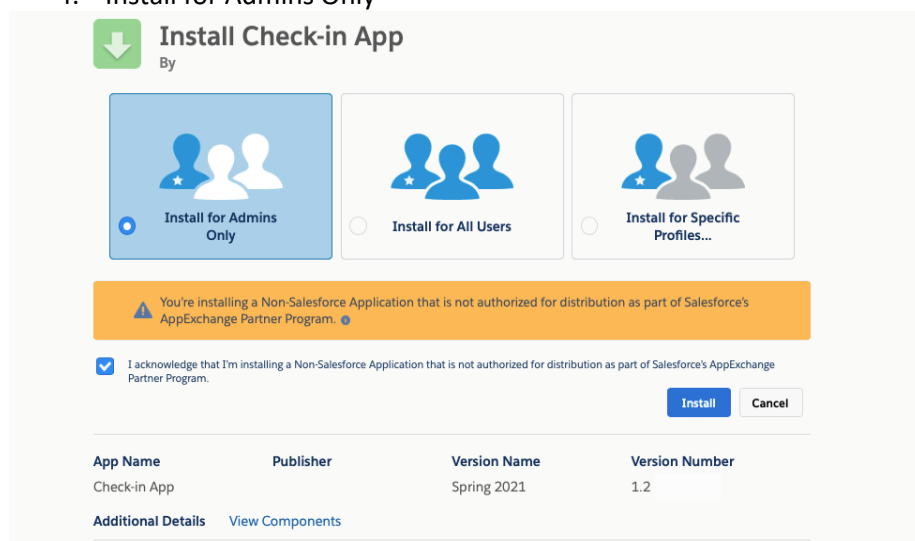
1. Sign into your Salesforce Org, and click on the **AppLauncher**.
2. Now click on the **AppExchange** button
3. Search for '**Check-in App**' and use the "Get it Now" option to install.



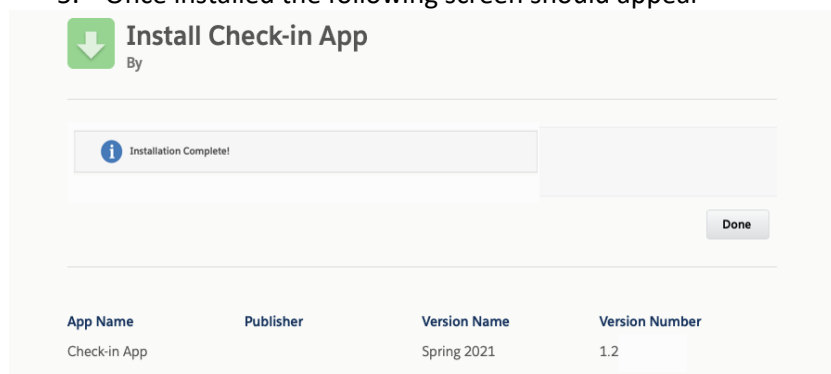
Installing the application

Follow the standard steps for installing AppExchange products into your Production, Developer or Sandbox org.

4. Install for Admins Only



5. Once installed the following screen should appear



Confirm the application has been successfully installed

v Apps

v Packaging

Installed Packages

Didn't find what you're looking for? Try using Global Search.

SETUP
Installed Packages

Installed Packages

[Help for this Page](#)

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#).

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Expiration Date	Install Date	Limits	Apps
Uninstall Check in App	Datacolada	1.2	DCcheckin	Trial	Unlimited	0	26/5/2021	26/4/2021, 2:05 pm	☐	1	

Configuring the Application

This section provides details on setup & configuration of the **'Check-in App'**.

Salesforce Sites

The **'Check-in App'** uses Salesforce Sites to create a public website that is directly integrated with your Salesforce organisation.

NOTE: Pre-Requisite: Ensure that you have a domain registered before creating a site

Create the Check-In Site

To get started using Salesforce Sites, from Setup, enter **Sites** in the Quick Find box, then select **Sites**.

1. Scroll down to the bottom section of the page, to the Sites section, click **New**
2. Enter the Site Label: **Check-in**
3. Site Name will auto populate.
4. Lookup the Site Contact if different from Logged in User.
5. At the end of the **Default Web Address** field, enter **checkinapp**
6. Select **Active**
7. Lookup & Select **'checkinpage'** from the Active Site Home Page list.

Site Edit

[Help for this](#)

New Site

Save Cancel

Site Label

Check-in

Site Name

Check_in

Site Description

Site Contact

User User

Default Record Owner

User User

Default Web Address

http://sandbox-app-test-developer-edition.cs73.force.com/

checkinapp

Active

☒

Active Site Home Page

checkinpage

Inactive Site Home Page

InMaintenance

Site Template

SiteTemplate

Site Robots.txt

Site Favorite Icon

Analytics Tracking Code

URL Rewriter Class

Enable Feeds

☐

Clickjack Protection Level

Allow framing by the same origin only (Recommended)

Require Secure Connections (HTTPS)

☒

Lightning Features for Guest Users

☒

Upgrade all requests to HTTPS

☒

8. Click on **Save**.

NOTE: To review the 'Check-in App' Site URL, click on the Sites page in the setup menu and scroll down to the Sites section at the bottom of the page.

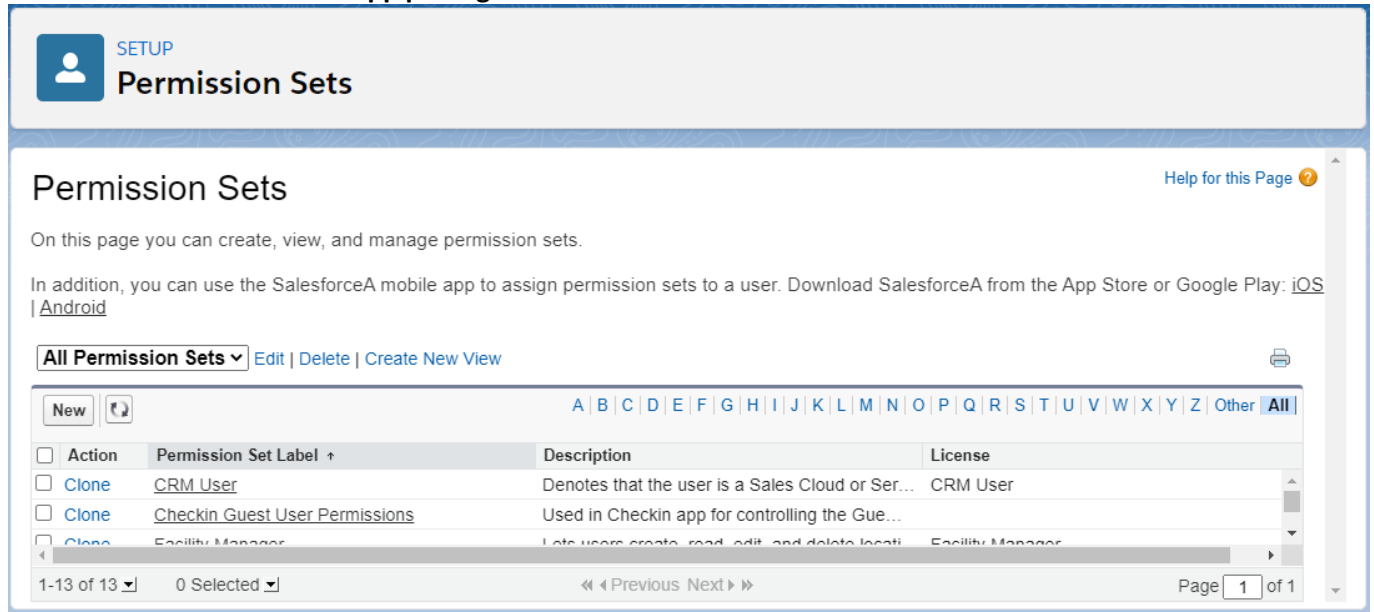
Create a new Permission Set

In this section we will be:

- Create a new Permission Set: **CheckinAppPermission**
- Give access to the Account / Contact and Leads object.

1. From **Setup**, Search and select **Permission Sets**

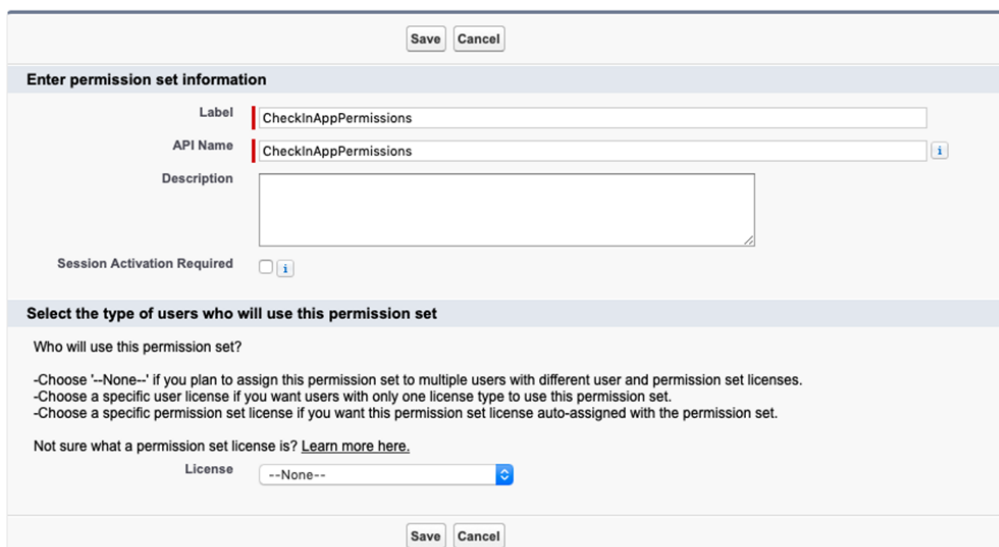
NOTE: The Check-in App package has created the Checkin Guest User Permission



The screenshot shows the Salesforce Setup interface for Permission Sets. At the top, there's a 'SETUP' header with a user icon and the text 'Permission Sets'. Below this, a sub-header 'Permission Sets' is followed by a help link 'Help for this Page'. A descriptive text states: 'On this page you can create, view, and manage permission sets. In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)'. Below the text, there's a filter dropdown 'All Permission Sets' and links 'Edit | Delete | Create New View'. A table lists existing permission sets with columns: Action, Permission Set Label, Description, and License. The table shows three entries: 'CRM User', 'Checkin Guest User Permissions', and 'Facility Manager'. At the bottom, there's a pagination bar showing '1-13 of 13' items, '0 Selected', and 'Page 1 of 1'.

2. Click on **New**
3. In the Label field, enter the name: **CheckinAppPermission**
(The API Name will auto-populate with CheckinAppPermission)
Leave the Session Activation unselected and the License unselected (-- none--)

Permission Set
Create



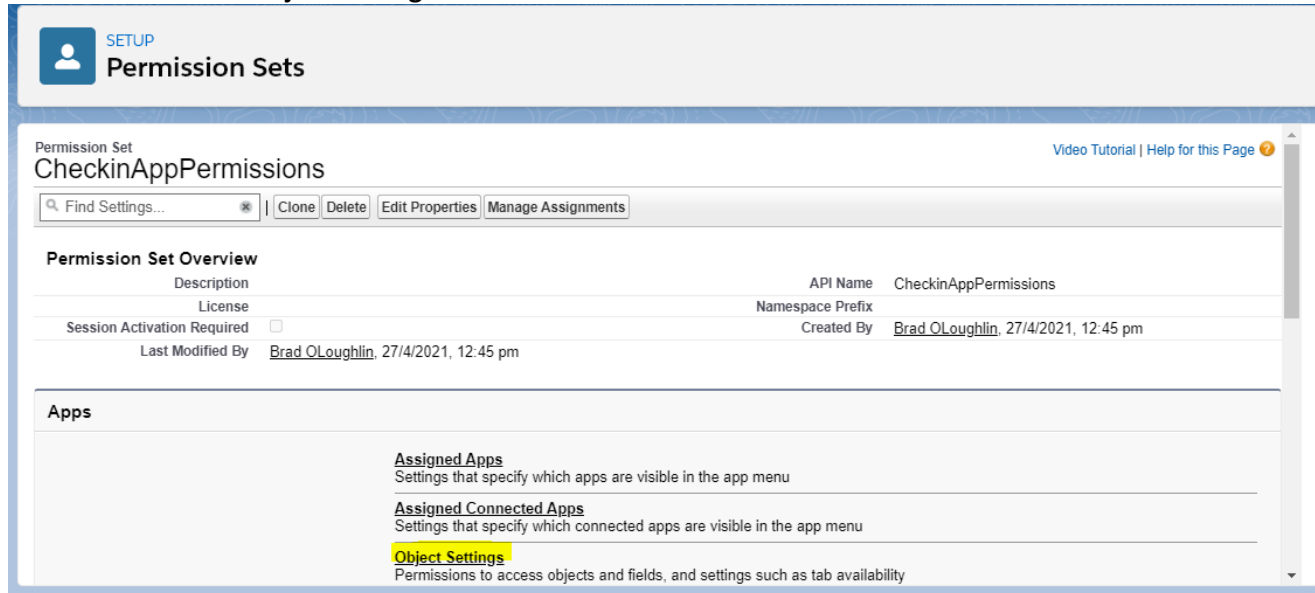
The screenshot shows the 'Create Permission Set' form. At the top, there are 'Save' and 'Cancel' buttons. The form is divided into two main sections. The first section, 'Enter permission set information', contains fields for 'Label' (pre-filled with 'CheckinAppPermissions'), 'API Name' (pre-filled with 'CheckinAppPermissions'), and 'Description' (an empty text area). Below these is a checkbox for 'Session Activation Required' which is unchecked. The second section, 'Select the type of users who will use this permission set', contains a dropdown for 'License' with the selected value '--None--'. At the bottom, there are 'Save' and 'Cancel' buttons.

4. Click **Save**

Edit the Object Settings

In the newly created Permission Set: **CheckinAppPermission**, give access to the **Account**, **Contact** and **Leads** object using the **Object Settings**

1. Click on the **Object Settings**



Permission Set Overview

Description	API Name	CheckinAppPermissions
License	Namespace Prefix	
Session Activation Required ☐	Created By	Brad OLoughlin, 27/4/2021, 12:45 pm
Last Modified By	Brad OLoughlin, 27/4/2021, 12:45 pm	

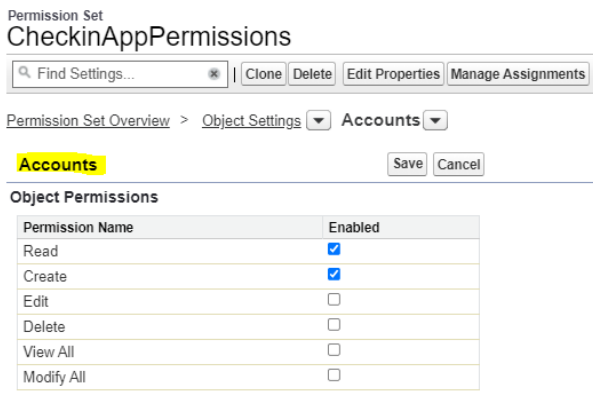
Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

2. Click on the **Account Object** and click on the **Edit button**
3. Click on the **Enabled Checkbox** for **Read** and **Create**



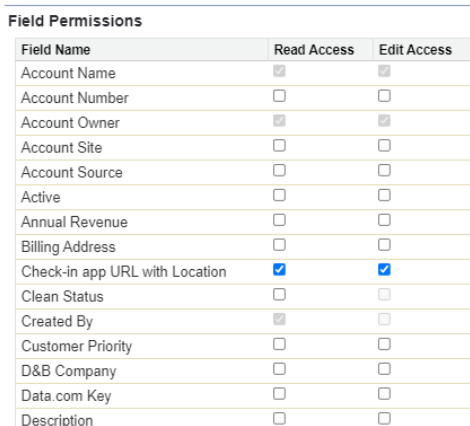
Permission Set Overview > Object Settings > Accounts

Accounts [Save] [Cancel]

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒
Edit	☐
Delete	☐
View All	☐
Modify All	☐

4. In the **Field Permission** section below, give **Read Access** and **Edit Access** to the Fields required



Field Permissions

Field Name	Read Access	Edit Access
Account Name	☒	☒
Account Number	☐	☐
Account Owner	☒	☒
Account Site	☐	☐
Account Source	☐	☐
Active	☐	☐
Annual Revenue	☐	☐
Billing Address	☐	☐
Check-in app URL with Location	☒	☒
Clean Status	☐	☐
Created By	☒	☐
Customer Priority	☐	☐
D&B Company	☐	☐
Data.com Key	☐	☐
Description	☐	☐

5. Then click **Save**

6. Now select the **Contact Object** and click on the **Edit button**
7. Click on the **Enabled Checkbox** for **Read** and **Create**

Permission Set
CheckinAppPermissions

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings > **Contacts**

Contacts Save Cancel

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒
Edit	☐
Delete	☐

8. In the **Field Permission** section below, give **Read Access** and **Edit Access** to all Fields required

Field Name	Read Access	Edit Access
Account Name	☒	☒
Assistant	☐	☐
Asst. Phone	☐	☐
Birthdate	☐	☐
Clean Status	☐	☐
Contact Owner	☒	☒
Created By	☒	☐
Data.com Key	☐	☐
Department	☐	☐
Description	☐	☐
Do Not Call	☐	☐
Email	☒	☒
Email Opt Out	☐	☐

9. Then click **Save**

10. Now click on the **Leads Object** and click on the **Edit button**
11. Click on the **Enabled Checkbox** for **Read** and **Create**

Permission Set
CheckinAppPermissions

Find Settings... | Clone Delete Edit Properties Manage Assignments

Permission Set Overview > Object Settings > **Leads**

Leads Save Cancel

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒
Edit	☐
Delete	☐

12. In the **Field Permission** section below, give **Read Access** and **Edit Access** to all Fields required

Field Name	Read Access	Edit Access
Do Not Call	☐	☐
Email	☒	☒
Email Opt Out	☐	☐
Encrypted Lead Id	☐	☐
Fax	☐	☐
Fax Opt Out	☐	☐
Individual	☒	☒
Industry	☐	☐
Last Modified By	☒	☐
Last Transfer Date	☐	☐
Lead Owner	☒	☒
Lead Source	☒	☒
Lead Status	☒	☒
Mobile	☐	☐
Name	☒	☒
No. of Employees	☐	☐
Number of Locations	☐	☐
Phone	☒	☒

13. Then click **Save**

14. Now click on the **Checkin/Checkout Transactions Object** and click on the **Edit button**

15. In the **Tab Settings** section, Click on the **Enabled Checkbox** for **Available** and **Visible**

16. In the **Checkin/Checkout Transaction: Record Type Assignments** section

check the **Record Types: Assigned Record Types**

17. In the **Object Permissions** click on the checkbox for **Read** and **Create (Enabled)**

Permission Set Overview > Object Settings

Checkin/Checkout Transactions

Tab Settings

Available	Visible
☒	☒

Checkin/Checkout Transaction: Record Type Assignments

Record Types	Assigned Record Types
Checkin	☒
Checkout	☒

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒
Edit	☐

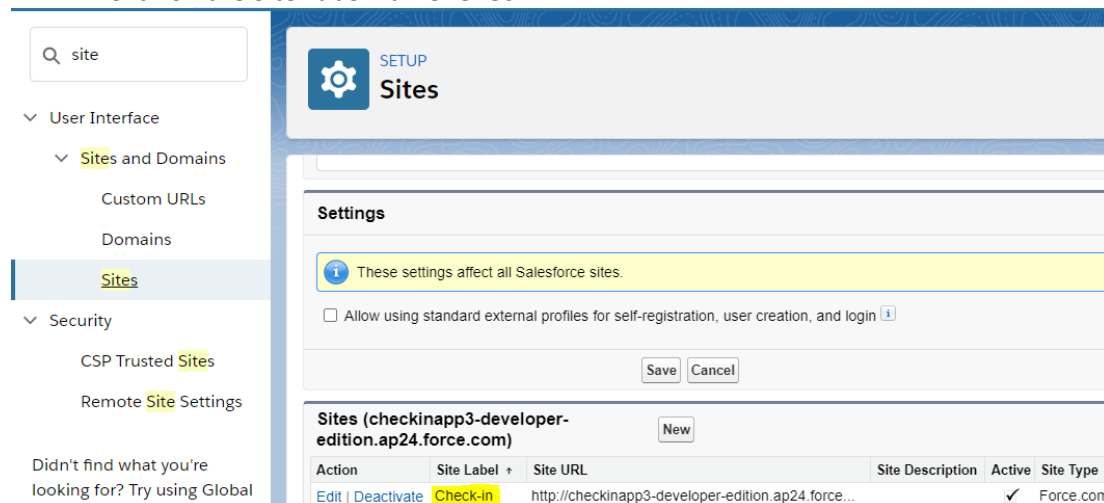
18. Then click **Save**

Site Permissions (Public Access Settings)

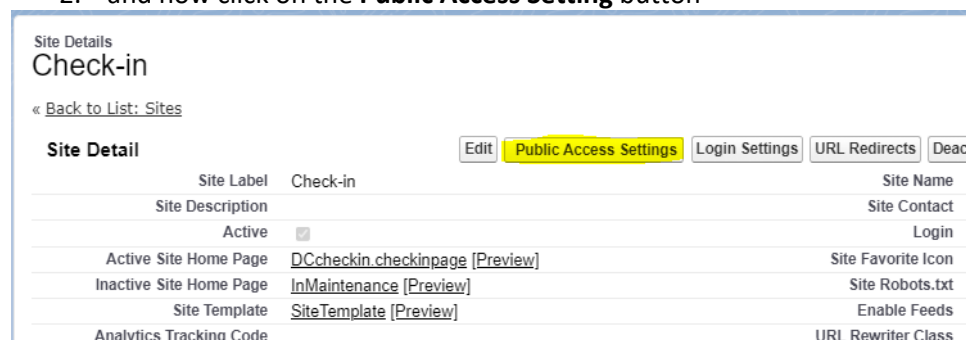
We need to assign the **permission set: CheckinAppPermission** to the **public site guest user**.

Navigate to the **site domain** you created earlier, on the **Sites page**

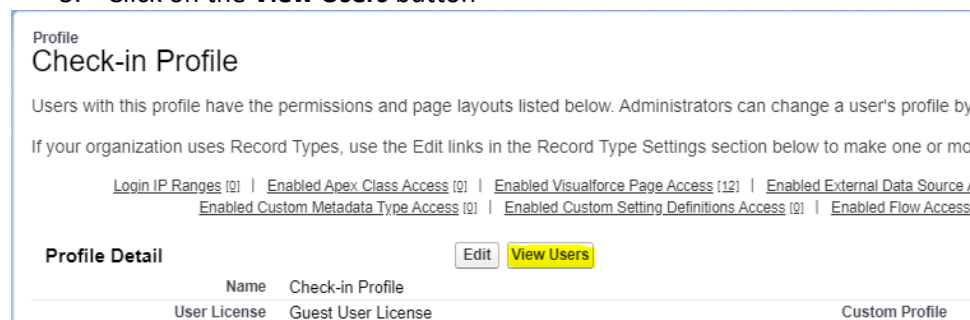
1. Click on the Site Label name: **Check-in**



2. and now click on the **Public Access Setting** button



3. Click on the **View Users** button



- This will take you to the Profile page for the Check-in Profile.


SETUP
Profiles

Check-in Profile

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other [Android](#)

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

Action	Full Name +	Alias	Username
Edit	Site Guest User, Check-in	guest	check_in@checkinapp3-developer-edition.ap24.force.com

- Click on **Site Guest User, Check-in**, which will take you to the **User: Checkin Site Guest User Page**


SETUP
Users

User

Check-in Site Guest User

[Permission Set Assignments \(0\)](#) |
 [Permission Set Assignments: Activation Required \(0\)](#) |
 [Permission Set Group Assignments \(0\)](#) |
 [Permission Set Licenses](#)
[Public Group Membership \(0\)](#) |
 [Queue Membership \(0\)](#) |
 [Installed Mobile Apps \(0\)](#)

User Detail
[Edit](#)
[Sharing](#)

Name	Check-in Site Guest User	User License	Guest License
------	--------------------------	--------------	---------------

- On the **USER: Check-in Site Guest User page**, scroll down to the **Permission Set Assignment** and click **Edit Assignments**.

Permission Set Assignments
[Edit Assignments](#)
[Permission Set Assignments Help ?](#)

No records to display

- On the **Permission Set Assignment page**, From the available **Permission Sets** select **Checkin Guest User Permissions** and **CheckinAppPermissions**
- and add them to the **Enabled Permission Sets**

Permission Set Assignments
Check-in Site Guest User

Save
Cancel

Available Permission Sets

- CRM User
- Facility Manager
- Order Management Agent
- Order Management Operations Manager
- Order Management Shopper
- Queue Manager
- Sales Cloud User
- Salesforce CMS Integration Admin
- Salesforce Console User
- Security Center Integration User

Add
Remove

Enabled Permission Sets

- Checkin Guest User Permissions
- CheckinAppPermissions

Save
Cancel

- Now your **Check-in Site Guest User** has the **Permission Sets** required

Permission Set Assignments
[Edit Assignments](#)
[Permission Set Assignments Help](#)

Action	Permission Set Label	Date Assigned
Del	Checkin Guest User Permissions	27/4/2021
Del	CheckinAppPermissions	27/4/2021

Custom Metadata Settings

Ensure the **Check In site Base URL** matches the '**Check-in**' Site domain you have created earlier.

To find your **Check-In Site URL** created in the 1st step,

1. Go to Setup, enter **Sites** in the Quick Find box, then select **Sites**.
2. Scroll down to the bottom of the page and right click on your **Check-in Site URL Link** and click on the **Copy Link Address** option.

Q site

Setup Sites

Settings

These settings affect all Salesforce sites.

☐ Allow using standard external profiles for self-registration, user creation, and login.

Save Cancel

Sites (checkinapp3-developer-edition.ap24.force.com)

New

Action	Site Label	Site URL
Edit Deactivate	Check-in	http://checkinapp3-developer-edition.ap24.force.com

Open link in new tab
Open link in new window
Open link in incognito window
Save link as...
Copy link address
Inspect

3. Paste the link somewhere handy (ie: in a Notepad) for the next step.

*Untitled - Notepad

File Edit Format View Help

http://checkinapp2-developer-edition.ap24.force.com/checkinapp

4. In **Setup**, search and select the **Custom Metadata Types**
5. On the **All Custom Metadata Types** page, click on the Label: **Checkin App Static Data**

Q meta

Setup Custom Metadata Types

All Custom Metadata Types

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SOQL limits.

New Custom Metadata Type

Action	Label	Installed Package	Namespace Prefix	Visibility	API Name
Manage Records	Check-in App Static data	Check-in App	DCcheckin	Public	DCcheckin__CheckinApp_Static_data__mdt

- Now click on the **Manage Check-in App Static Data** button

Custom Metadata Type

Check-in App Static data (Managed)

This custom metadata type is managed. You can only edit certain attributes. [Display More Information](#)

[Standard Fields \(6\)](#) | [Custom Fields \(3\)](#) | [Validation Rules \(0\)](#) | [Page Layouts](#)

Custom Metadata Type Detail [Edit](#) [Manage Check-in App Static data](#)

Singular Label	Check-in App Static data	Description
Plural Label	Check-in App Static data	Visibility
Object Name	CheckinApp_Static_data	Protection Level
Namespace Prefix	DCcheckin	Record Size
API Name	DCcheckin__CheckinApp_Static_data__mdt	

- And then under the Label, click on the **Check-in Static Data** link

Check-in App Static data

View: [All](#) [Create New View](#) [New](#)

Action	Label +	Check-in App Static data Name
Edit	Check-in Static Data	checkinStaticData

- On the Check-in App Static Data page, click on the **edit** button
- From the **Notepad** you saved your **Checkin Site Base URL** earlier, copy and paste your **Checkin Site Base URL** into the field and click **Save**

Check-in App Static data (Managed)

This Check-in App Static data is managed, meaning that you may only edit certain attributes. [...](#)

Check-in App Static data Detail [Edit](#) [Clone](#)

Label	Check-in Static Data
Check-in App Static data Name	checkinStaticData
Checkin Site Base URL	https://dc-check-in-developer-edition.ap16.forc...
Contact Encryption PrivateKey	+EPb7eEUW4YUVUh3PLpe+w==
Enable Checkin Email	☒
Created By	Brad OLoughlin, 26/4/2021, 2:05 pm

[Edit](#) [Clone](#)

- Your '**Check-in**' App will now refer to your site (instead of ours)

Check-in App Static data (Managed)

This Check-in App Static data is managed, meaning that you may only edit certain attributes. [...](#)

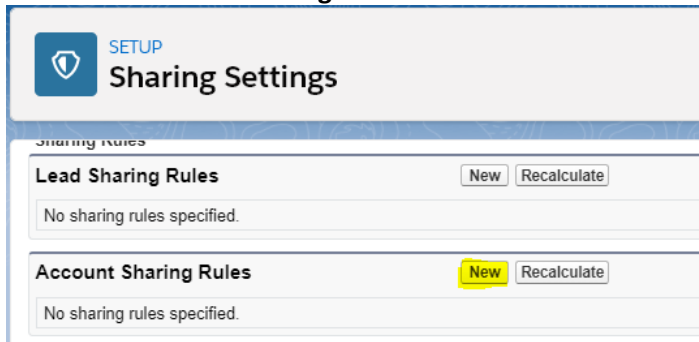
Check-in App Static data Detail [Edit](#) [Clone](#)

Label	Check-in Static Data
Check-in App Static data Name	checkinStaticData
Checkin Site Base URL	http://checkinapp3-developer-edition.ap24.force...
Contact Encryption PrivateKey	+EPb7eEUW4YUVUh3PLpe+w==

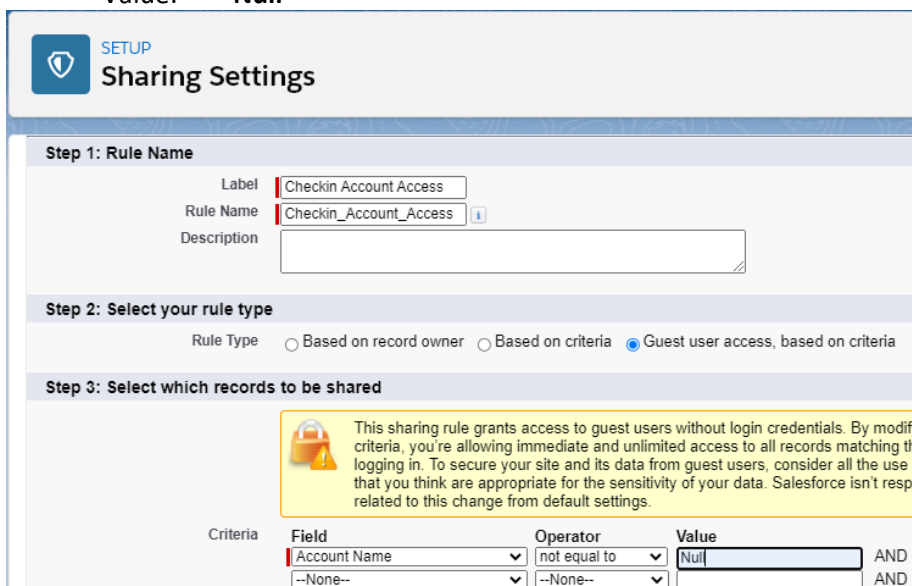
Sharing Setting Rules

Define the following rules and assign them to the **Check-in Site Guest User profile** with the **Read Only** access level

1. In **Setup**, search and select **Sharing Settings** and scroll down to the bottom section to **Account Sharing Rules**:

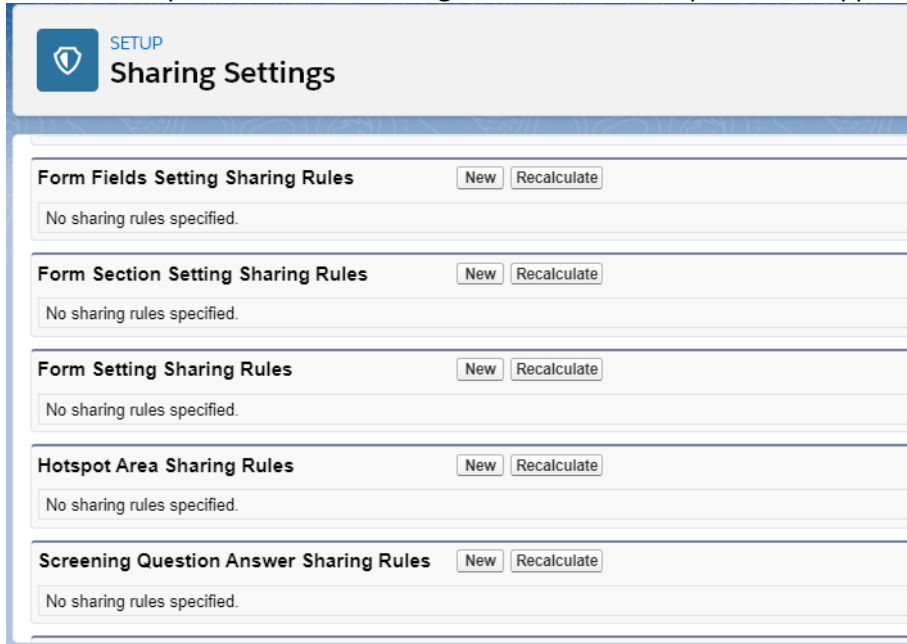


1. Click on the **New** button, and enter the following
 Label: **Checkin Account Access**
 Rule type: **Guest user access, based on Criteria**
 Field: **Account Name**
 Operator: **Not equal to**
 Value: **Null**

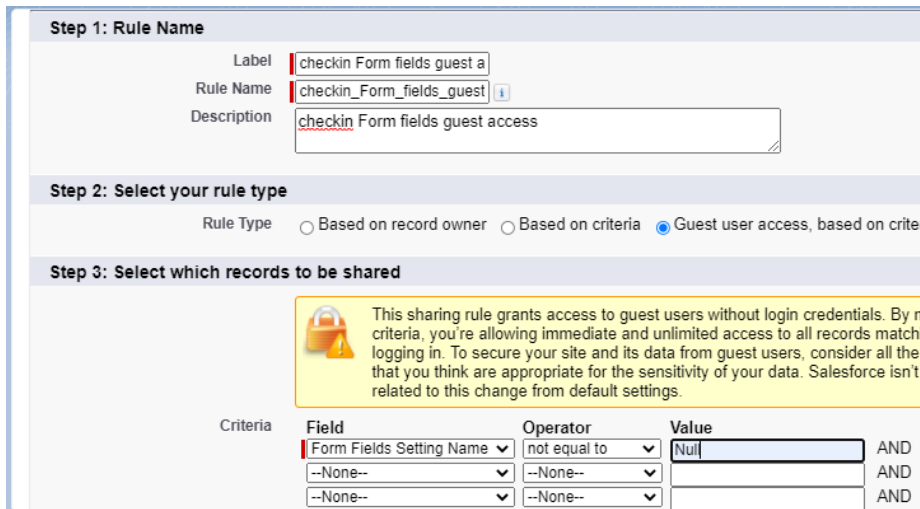


2. and click **Save**

Now will complete the 3 new **Sharing Rules** for the **Form** part of the App



3. Scroll down to the very bottom section to **Form Fields Setting Sharing Rules**:
4. Click on the **New** button, and enter the following
 Label: **Checkin Form Fields Guest Access**
 Rule type: **Guest user access, based on Criteria**
 Field: **Form Fields Setting Name**
 Operator: **Not equal to**
 Value: **Null**



Step 1: Rule Name

Label: checkin Form fields guest a
 Rule Name: checkin_Form_fields_guest
 Description: checkin Form fields guest access

Step 2: Select your rule type

Rule Type: ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

Step 3: Select which records to be shared

This sharing rule grants access to guest users without login credentials. By using criteria, you're allowing immediate and unlimited access to all records matching the criteria. To secure your site and its data from guest users, consider all the implications that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for this change from default settings.

Criteria	Field	Operator	Value	
	Form Fields Setting Name	not equal to	Null	AND
	--None--	--None--		AND
	--None--	--None--		AND

5. and click **Save**

6. Scroll down to the bottom section to **Form Section Setting Sharing Rules**:
7. Click on the **New** button, and enter the following
 - Label: **Checkin Guest Form Section Access**
 - Rule type: **Guest user access, based on Criteria**
 - Field: **Form Section Setting Name**
 - Operator: **Not equal to**
 - Value: **Null**

Step 1: Rule Name

Label

Checkin Guest Form Sectic

Rule Name

Checkin_Guest_Form_Sec

Description

Checkin Guest Form Section Access

Step 2: Select your rule type

Rule Type

☐ Based on record owner
 ☐ Based on criteria
 ☒ Guest user access, based on criteria

Step 3: Select which records to be shared



This sharing rule grants access to guest users without login credentials. By modifying the criteria, you're allowing immediate and unlimited access to all records matching the logging in. To secure your site and its data from guest users, consider all the use cases and information that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for any data loss related to this change from default settings.

Criteria	Field	Operator	Value	
	Form Section Setting Name	not equal to	Null	AND
	--None--	--None--		AND
	--None--	--None--		AND

8. and click **Save**

9. Scroll down to the bottom section to **Form Setting Sharing Rules**:
10. Click on the **New** button, and enter the following
 - Label: **Checkin Guest Form Setting Access**
 - Rule type: **Guest user access, based on Criteria**
 - Field: **Form Type Name**
 - Operator: **Not equal to**
 - Value: **Null**

SETUP

Sharing Settings

Step 1: Rule Name

Label

Checkin Guest Form setting

Rule Name

Checkin_Guest_Form_setti

Description

Checkin Guest Form setting Access

Step 2: Select your rule type

Rule Type

☐ Based on record owner
 ☐ Based on criteria
 ☒ Guest user access, based on criteria

Step 3: Select which records to be shared



This sharing rule grants access to guest users without login credentials. By modifying the default criteria, you're allowing immediate and unlimited access to all records matching these criteria logging in. To secure your site and its data from guest users, consider all the use cases and information that you think are appropriate for the sensitivity of your data. Salesforce isn't responsible for any data loss related to this change from default settings.

Criteria	Field	Operator	Value	
	Form Type Name	not equal to	Null	AND
	--None--	--None--		AND
	--None--	--None--		AND

11. and click **Save**

DataColada Pty Ltd

ABN 59 603 638 393

Email: support@datacolada.com

12. When you scroll down through the Sharing Rules, you should have (x4) Sharing Rules similar to these


SETUP
Sharing Settings

Account Sharing Rules
[New](#) [Recalculate](#)
[Account Sharing Rules Help ?](#)

Action	Criteria	Shared With	Account and Contract	Opportunity	Case
Edit Del	Account: Account.TextName NOTEQUALTO Null	Check-in Site Guest User	Read Only	Private	Private

Form Fields Setting Sharing Rules
[New](#) [Recalculate](#)
[Form Fields Setting Sharing Rules Help ?](#)

Action	Criteria	Shared With	Access Level
Edit Del	Form Fields Setting: Form Fields Setting Name NOTEQUALTO Null	Check-in Site Guest User	Read Only

Form Section Setting Sharing Rules
[New](#) [Recalculate](#)
[Form Section Setting Sharing Rules Help ?](#)

Action	Criteria	Shared With	Access Level
Edit Del	Form Section Setting: Form Section Setting Name NOTEQUALTO Null	Check-in Site Guest User	Read Only

Form Setting Sharing Rules
[New](#) [Recalculate](#)
[Form Setting Sharing Rules Help ?](#)

Action	Criteria	Shared With	Access Level
Edit Del	Form Setting: Form Type Name NOTEQUALTO Null	Check-in Site Guest User	Read Only

Check-in App Settings

Change the ownership of the Forms and Fields

By default, the ownership is “**CheckInApp**” so this needs to be changed by the admin.

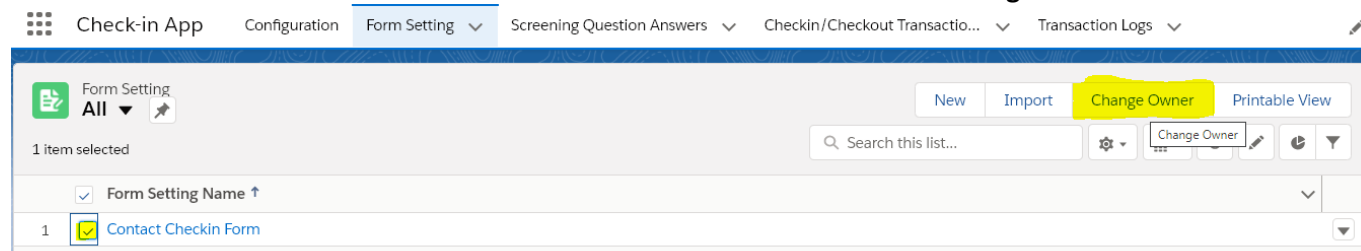
We need to change the ownership of the created records to the **admin user** for your organisation.

This is a critical step, will take us through the Form, Form Record & Form Fields:

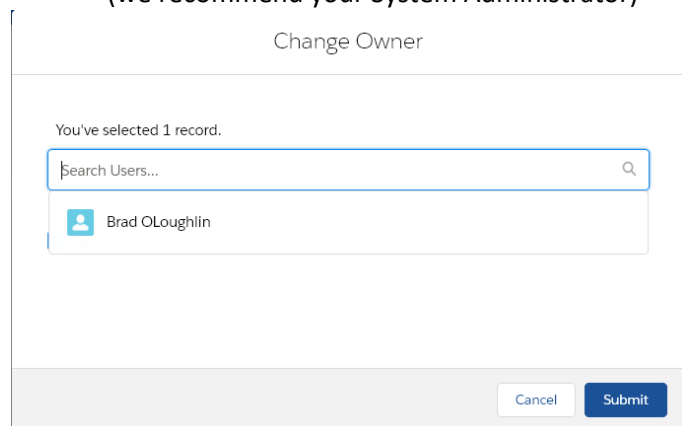
- **Contact CheckIn form** (and its related list’s and related fields)
- **Contact Personal Details** (and its related list’s and related fields)
- **Contact Questionnaire** (and its related list’s and related fields)

Starting from the Form Setting Record change the ownership, then select the related list and change the ownership for each record, etc...

1. Click on the **App Launcher** and select the **Check-in App** tile
2. Click on the **Form Setting** tab
3. From the **Form Setting** List View drop down, and select the List View: **All**
4. Now check the box next to the **Contact Checkin Form** and click on the **Change Owner** button



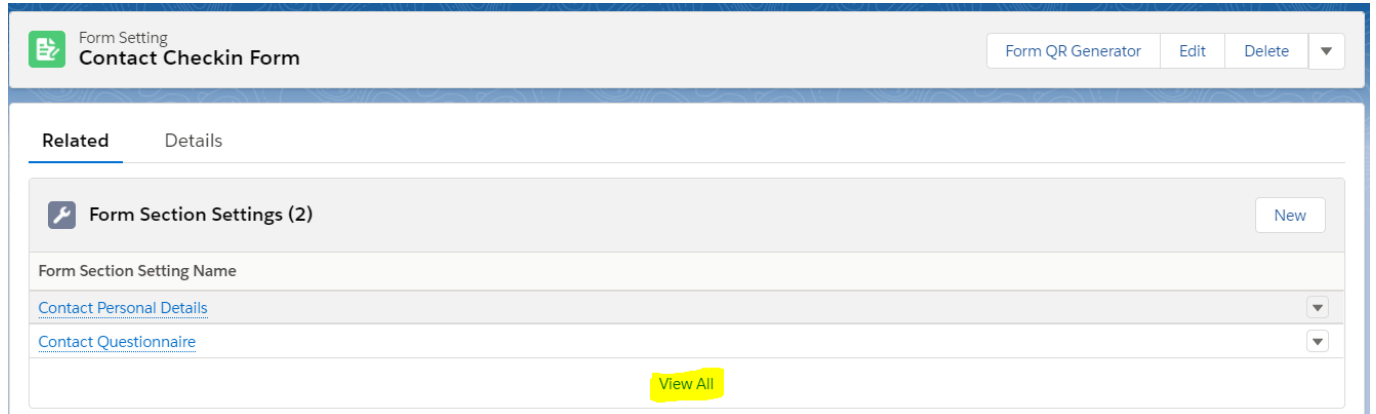
5. Now select the new **owner** of the records for the Checkin App (we recommend your System Administrator)



6. And click on the **Submit** button

Next step is to Change the **Owner** of the **Related Forms**

1. Click on the **Related Tab** and click on **View All**



Form Setting
Contact Checkin Form

Form QR Generator Edit Delete

Related Details

Form Section Settings (2) New

Form Section Setting Name

[Contact Personal Details](#)

[Contact Questionnaire](#)

View All

Check-in App Configuration Form Setting Screening Question Answers Checkin/Checkout Transaction... Transaction Logs

Form Setting > Contact Checkin Form
Form Section Settings New Change Owner

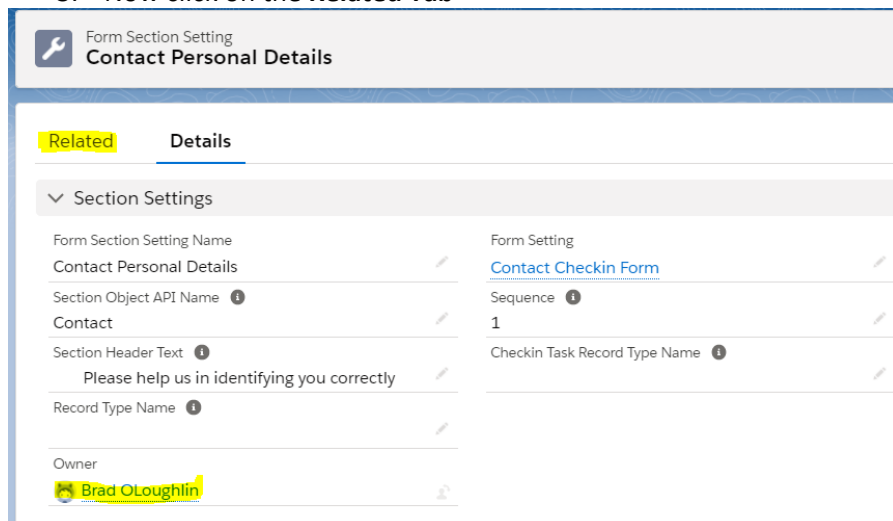
2 Items selected

	Form Section Setting Name	
1	☒ Contact Personal Details	
2	☒ Contact Questionnaire	

2. Click on the checkboxes for the (x2) Form Section Setting Name and click on the **Change Owner** button
3. Now select the designated **User** (as per the previous step)

Next Step is Changing the Owner of the Child Records

1. Click on **Contact Personal Details** to open the **Form Section Setting** for **Contact Personal Details** (if your Details tab is blank, please click on the refresh button in your browser)
2. You can verify the Contact Personal Details record **Owner** has been changed to the designated User
3. Now click on the **Related Tab**



Form Section Setting
Contact Personal Details

Related Details

Section Settings

Form Section Setting Name	Form Setting
Contact Personal Details	Contact Checkin Form
Section Object API Name	Sequence
Contact	1
Section Header Text	Checkin Task Record Type Name
Please help us in identifying you correctly	
Record Type Name	
Owner	
Brad O'Loughlin	

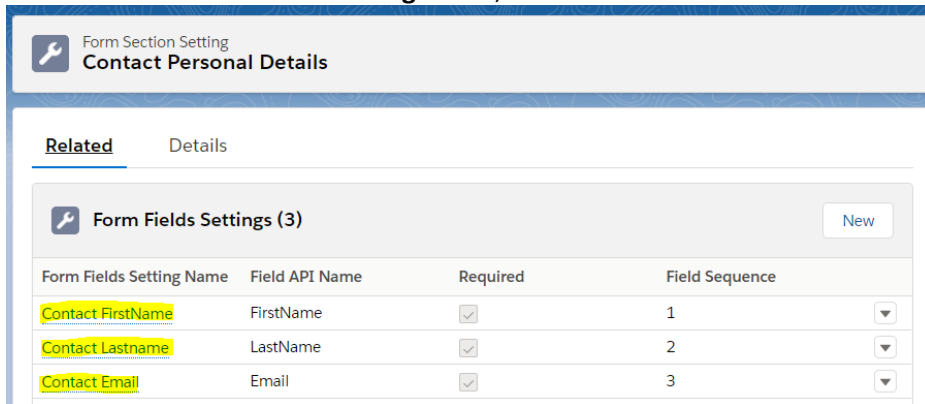
NOTE: If you are not seeing the fields in the details tab, try clicking on the refresh button in your browser.

NOTE: If you are not seeing the **Owner Field**, you may have to add the **owner field** to the following page layouts:

- Form Fields Setting
- Form Section Settings
- Form Setting

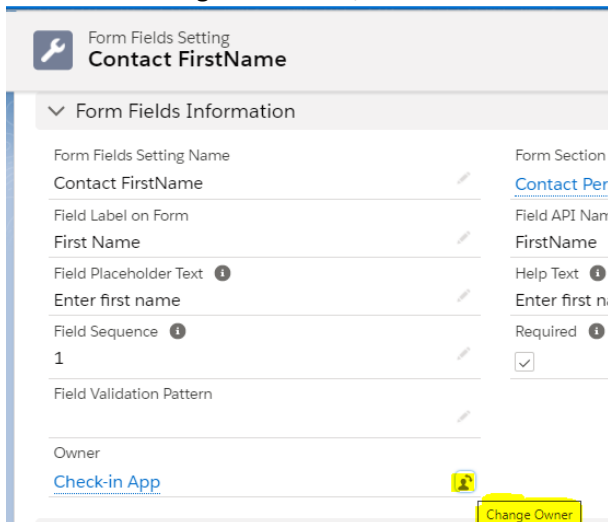
Change the Field Ownership

1. In this next step, we will be changing the **Owner** of the **Fields**
2. Under **Form Fields Setting Name**, click on the **Contact FirstName**



Form Fields Setting Name	Field API Name	Required	Field Sequence
Contact FirstName	FirstName	☒	1
Contact LastName	LastName	☒	2
Contact Email	Email	☒	3

3. To change the owner, click on the **small icon** highlighted for the **Change Owner** option to appear.



Form Fields Setting
Contact FirstName

Form Fields Information

Form Fields Setting Name: Contact FirstName

Field Label on Form: First Name

Field Placeholder Text: Enter first name

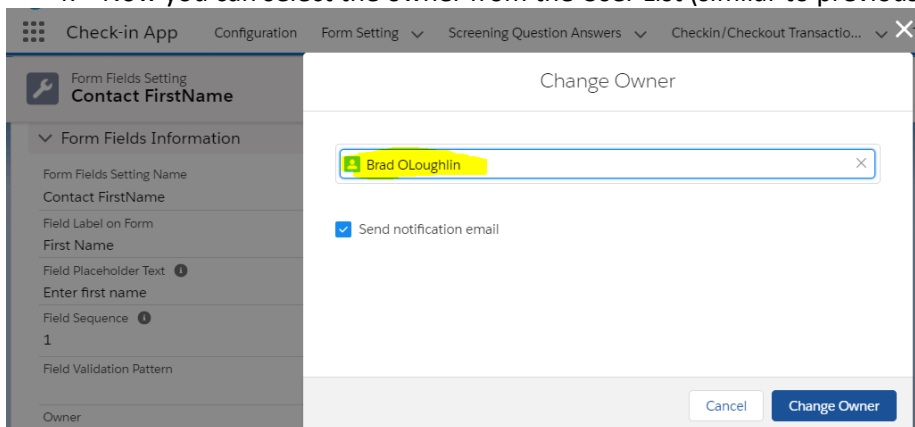
Field Sequence: 1

Field Validation Pattern:

Owner: [Check-in App](#)

Change Owner

4. Now you can select the owner from the User List (similar to previous steps)



Check-in App Configuration Form Setting Screening Question Answers Checkin/Checkout Transactio...

Form Fields Setting
Contact FirstName

Form Fields Information

Form Fields Setting Name: Contact FirstName

Field Label on Form: First Name

Field Placeholder Text: Enter first name

Field Sequence: 1

Field Validation Pattern:

Owner: [Check-in App](#)

Change Owner

Brad O'Loughlin

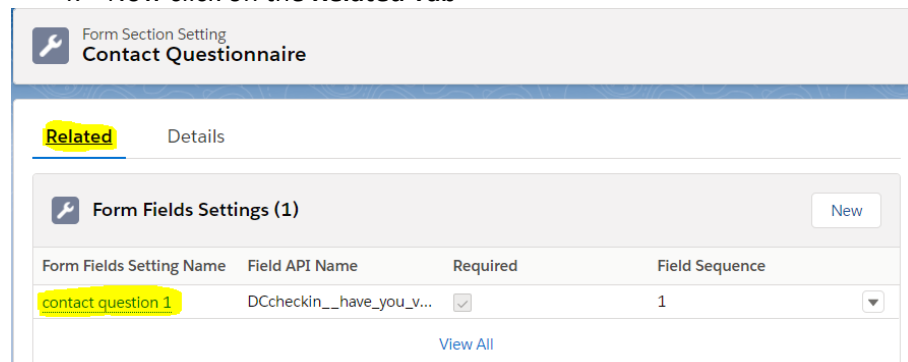
☒ Send notification email

Cancel Change Owner

5. And click on the **Change Owner** button
6. You can click on the **Go Back button** in your browser to return to the previous page.
7. Now repeat these steps for the other 2 Fields
Contact LastName
Contact Email

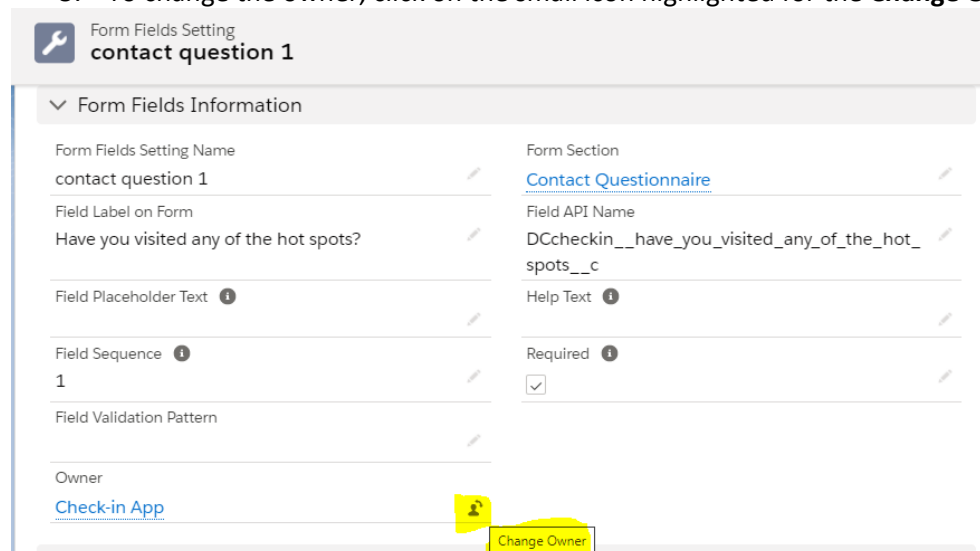
Now we need to change the ownership for the **Contact Questionnaire** following similar steps just completed for the **Contact Personal Details**.

1. Navigate back to the **Form Setting** Tab and click on the **Contact Checkin Form**, then select the **related Tab**
2. Click on **Contact Personal Details** to open the **Form Section Setting** for **Contact Questionnaire**
3. You can verify the Contact Personal Details record **Owner** has been changed to the designated User
4. Now click on the **Related Tab**



Form Fields Setting Name	Field API Name	Required	Field Sequence
contact question 1	DCcheckin__have_you_v...	☒	1

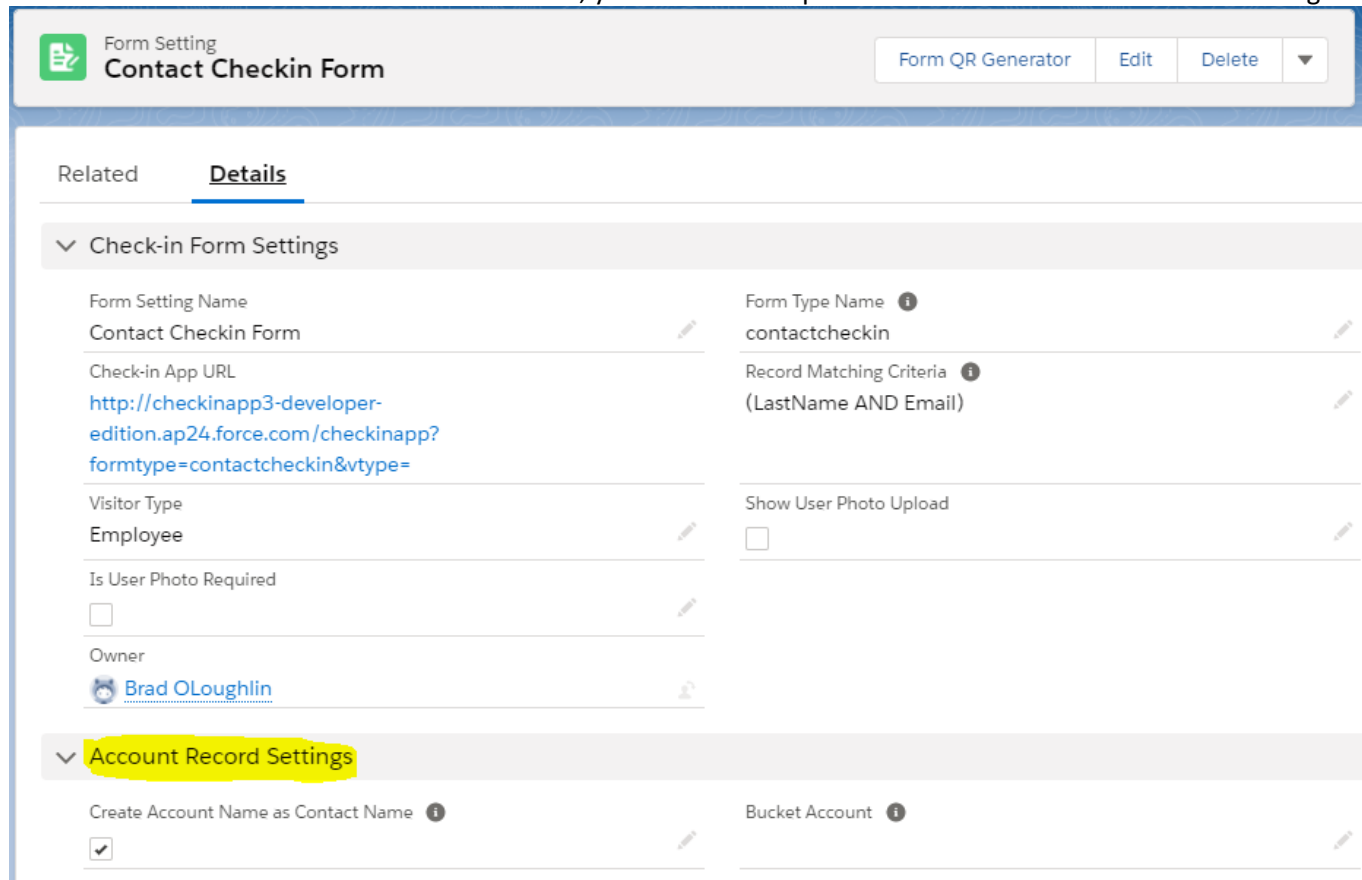
5. To change the owner, click on the small icon highlighted for the **Change Owner** option to appear.



6. Now you can select the **owner** from the User List (similar to previous steps)
7. And click on the **Change Owner** button

Account Record Settings

On the Details Tab of the **Contact Checkin Form**, you can see the option to choose the Account Record Settings.



The screenshot shows the 'Form Setting' interface for the 'Contact Checkin Form'. The 'Details' tab is active. Under 'Check-in Form Settings', the following fields are visible:

- Form Setting Name:** Contact Checkin Form
- Check-in App URL:** <http://checkinapp3-developer-edition.ap24.force.com/checkinapp?formtype=contactcheckin&vtype=>
- Visitor Type:** Employee
- Is User Photo Required:** ☐
- Owner:** Brad O'Loughlin
- Form Type Name:** contactcheckin
- Record Matching Criteria:** (LastName AND Email)
- Show User Photo Upload:** ☐

The 'Account Record Settings' section is highlighted in yellow and contains the following options:

- Create Account Name as Contact Name:** ☒ (This option is selected)
- Bucket Account:** (This option is not selected)

The options are:

Create Account Name as Contact Name

When selected all new Contacts will have an Account created (Contact FirstName & LastName).

This option should not be selected if using "Household Account Model" or "Bucket Account"

Bucket Accounts

Contacts are automatically assigned to the "Bucket Account" selected.

This option should not be selected if using "Household Account Model" or "Create Account Name as Contact Name" has been selected.

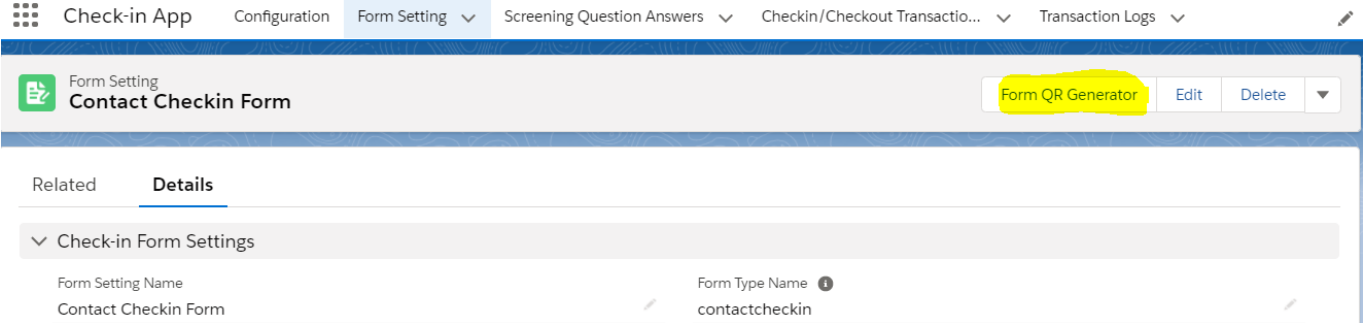
Lightning App Form Details

The Checkin Form

We are almost there, now its time to set up the **QR Code**.

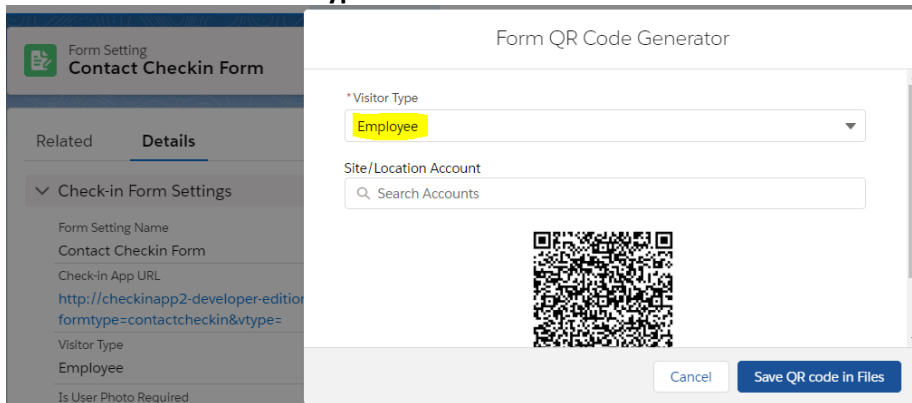
Setting up the Form QR Generator

1. To Generate a QR Code we use the form QR Generator that is located on the **Form Settings Page**.
2. Launch the Form QR Generator by clicking on the **Form QR Generator** button



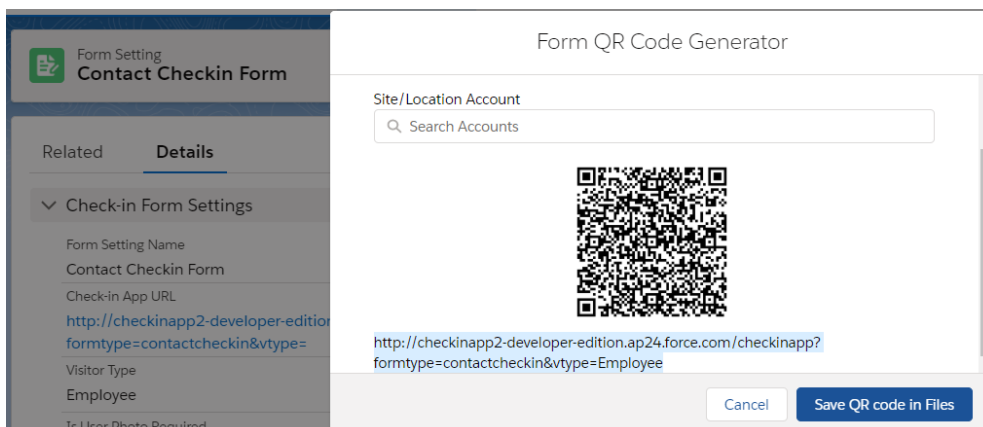
The screenshot shows the 'Form Setting' page for 'Contact Checkin Form'. The navigation bar includes 'Check-in App', 'Configuration', 'Form Setting', 'Screening Question Answers', 'Checkin/Checkout Transactio...', and 'Transaction Logs'. The 'Form QR Generator' button is highlighted in yellow. Below the navigation bar, there are tabs for 'Related' and 'Details'. The 'Details' tab is active, showing 'Form Setting Name' as 'Contact Checkin Form' and 'Form Type Name' as 'contactcheckin'.

1. select the **Visitor Type**



The screenshot shows the 'Form QR Code Generator' dialog box. The 'Visitor Type' dropdown is set to 'Employee'. Below the dropdown is a 'Site/Location Account' search bar. A QR code is displayed in the center. At the bottom, there are 'Cancel' and 'Save QR code in Files' buttons.

NOTE: At this stage, we highly recommend that you test the Check-in App URL, to ensure you are on track. Just below the QR Code image, copy the **Checkin Page URL** just created and paste the URL into a new incognito browser. If the check-in page appears, your setup has been successfully completed. If you get an error, please go through the steps again reviewing each screen with the images in this document.



The screenshot shows the 'Form QR Code Generator' dialog box. The 'Checkin Page URL' is displayed below the QR code: <http://checkinapp2-developer-edition.ap24.force.com/checkinapp?formtype=contactcheckin&vtype=Employee>. At the bottom, there are 'Cancel' and 'Save QR code in Files' buttons.

2. Now you can click on the **Save QR Code in Files** button.

This QR code will now be located on the **Related Tab** under **Files**.

You can rename your QR Code without affecting the functionality if required.


Form Setting
Contact Checkin Form

[Form QR Generator](#)
[Edit](#)
[Delete](#)

Related
Details


Form Section Settings (2)
[New](#)

Form Section Setting Name

[Contact Personal Details](#)

[Contact Questionnaire](#)

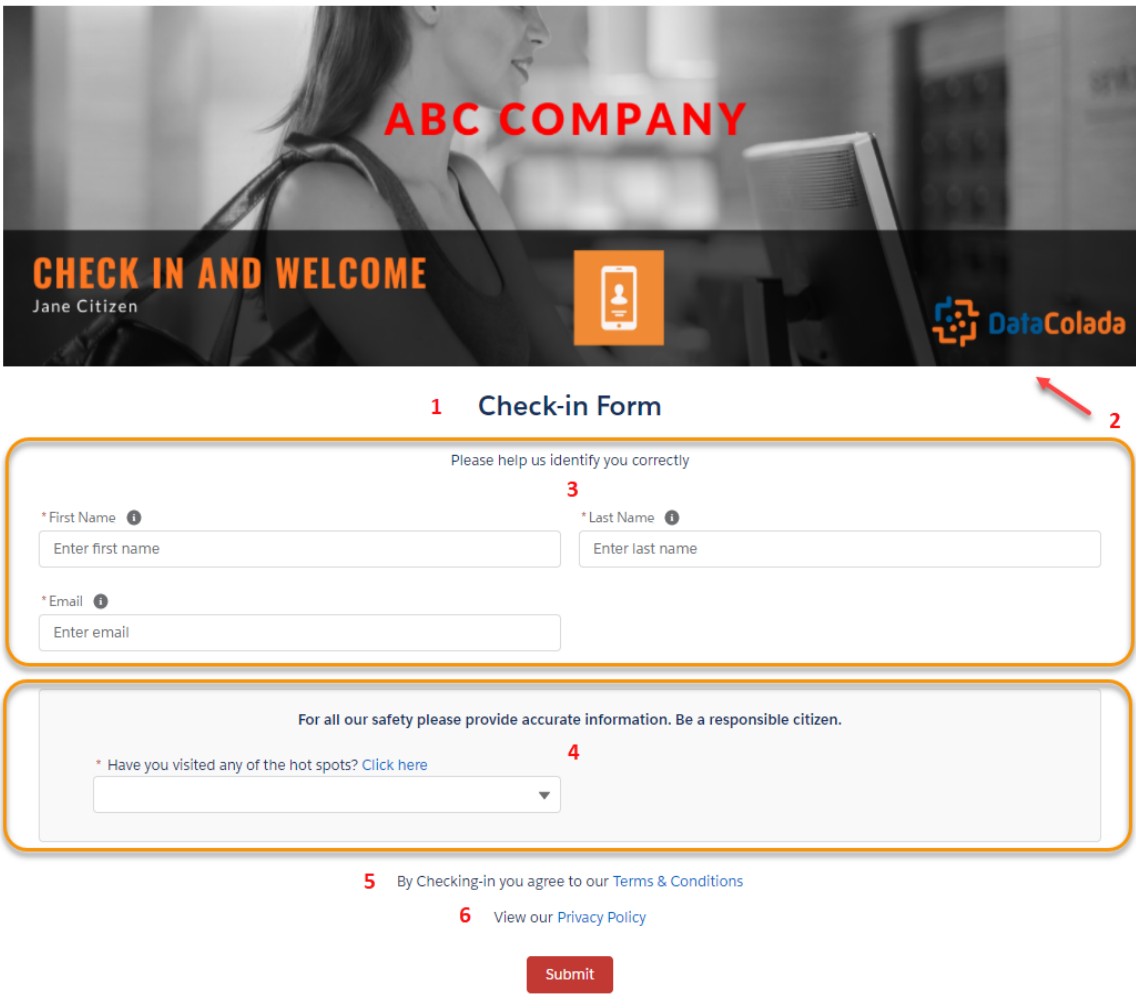
[View All](#)


Files (1)
[Add Files](#)


Employee form QR code.jpg
17 Dec 2020 • 3KB • jpg

[View All](#)

Personalisation of The App & Forms



The screenshot displays a 'Check-in Form' interface. At the top, a banner features the text 'ABC COMPANY' in red, 'CHECK IN AND WELCOME' in orange, and 'Jane Citizen' in white. Below the banner, the form is titled '1 Check-in Form'. A red arrow points to the 'DataColada' logo in the top right corner, labeled '2'. The form contains three input fields: '* First Name' (labeled '3'), '* Last Name' (labeled '3'), and '* Email'. Below these fields is a section titled '4' with the text 'For all our safety please provide accurate information. Be a responsible citizen.' and a dropdown menu. At the bottom, there are two links: '5 By Checking-in you agree to our Terms & Conditions' and '6 View our Privacy Policy'. A red 'Submit' button is located at the very bottom.

The **Check-in Form** is dynamic and can be personalised through **Form Settings, Form Section Settings & Form Field Settings**:-

1. Lightning App or Site page Form Header (Form Settings)
2. Desktop & Mobile Banner (Form Settings)
3. Contact Personal Details (Form Section Settings)
4. Contact Questionnaire (Form Section Settings)
5. Terms & Conditions (Form Settings)
6. Privacy Policy (Form Settings)

 Form Setting

Form QR GeneratorEditDelete

Lightning App Form Details

Form Header for Lightning App

Check-in Form

Check-in Form Details

Static Resource URL for Desktop Banner

/resource/DCcheckin__checkinAppData/desktopBanner.png

Static Resource URL for Mobile Banner

/resource/DCcheckin__checkinAppData/mobileBanner.png

Form Header Text

Check-in Form

Terms & Conditions Message

By Checking-in you agree to our

Terms & Conditions

Your terms & condition rich text come here

Privacy Policy Message

View our

Privacy Policy

Your privacy policy rich text come here

Confirm Form Details

Show Add Guest Button

☒

Show Add Guest Button (Caution Response)

☒

Confirm Details Message

I confirm that all details are correct

The Header displayed on the Check-in form of the Lightning App, which can be entered in Rich Text Format.

This field contains the static resource image file url used for the Desktop Banner, from Setup, enter Static Resources.

1. You can package a collection of files into a directory hierarchy and upload that hierarchy as a .zip.
Eg: /resource/checkinAppData/desktopBanner.png
2. You can also directly upload an image file in a static resource & provide a link.
Eg: /resource/checkinDesktopBanner

This field contains the static resource image file url used for the Mobile Banner, which should use the above formats

This is the Form Header displayed on the Check-in Form Site page, which can be entered in Rich Text Format.

Terms & Conditions Message

This is the Terms & Conditions Message appearing on the Check-in Form Site page next to the Hyperlink, which can be entered in Rich Text Format.

Terms & Conditions

Your Terms & Conditions can be entered in Rich Text Format.

Privacy Policy Message

This is the Privacy Policy Message appearing on the Check-in Form Site page. Your Terms & Conditions can be entered in Rich Text Formatted next to the Hyperlink, which can be entered in Rich Text Format.

Privacy Policy

Your Privacy Policy can be entered in Rich Text Format.

The Confirm Details Message can be updated (Form Settings)



ABC COMPANY

CHECK IN AND WELCOME
Jane Citizen

Welcome Jane Citizen

Please confirm details below

First Name:	Jane
Last Name:	Citizen
Email:	jane.citizen@example.com
Have you visited any of the hot spots?:	No

7 ☒ I confirm that all details are correct

8 ☐ Add Guest

[Edit](#) [Check In >](#)

7. Ability to Add Guests can be controlled by the **Show Add Guest Button** (Form Settings)

8. **Show Add Guest Button**, This Checkbox will display the Add Guest Button on the Confirm Details page.

▼ Confirm Form Details

Show Add Guest Button	Show Add Guest Button (Caution Response)
☒	☒
Confirm Details Message	
I confirm that all details are correct	

Show Add Guest Button (Caution Response)

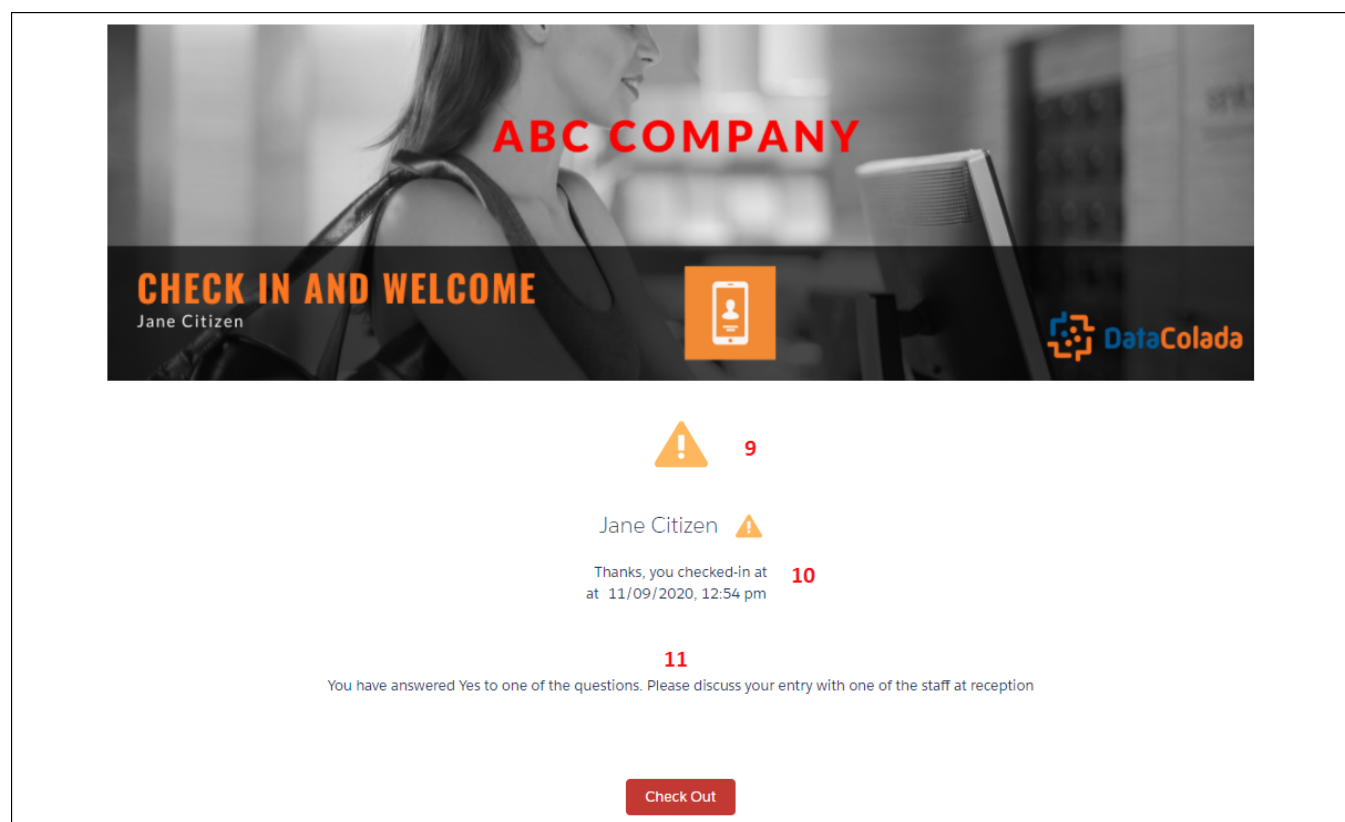
This Checkbox will display the Add Guest Button on the Confirm Details page when the Caution Response Answer is selected. If Unchecked the Add Guest button will be hidden.

Confirm Details Message

Confirm Details Message appearing on the confirm form. The message can be entered in Rich Text Format.

Thank You Message on Check-in

The Thank You Message displayed on the Confirmation & Check-out Details page. The message can be entered in Rich Text Format.



9. Disable the Caution Response & Message by unchecking Show Caution Response.

The **Caution Response Message** can be updated (Form Settings)

10. The Thank you Message on Check-in can be updated (Form Settings)

11. The Caution Response Message on Check-in can be updated (Form Settings)

Caution Response Message

The Caution Response Message will be displayed on the Check-in form if Enabled when a Caution Response Answer is selected and can be entered in Rich Text Format.

Show Caution Response

When checked the **Caution Response Message & Icon** will be displayed on the Confirmation & Check-out Details page when the Caution Response Answer is selected. If Unchecked the message & Icon will not be displayed.

Please Note: The Caution Response Answer field is referenced in Form Field Settings

The Confirmation & Check-out Form Details



12 Thanks!, you checked-out successfully. Visit again.

11/09/2020, 01:40 pm

12. The Thank you Message on Check-out can be updated (Form Settings)

 Form Setting

Contact Checkin Form

[Form QR Generator](#)
[Edit](#)
[Delete](#)

Confirmation & Check-out Form Details

Caution Response Message ⓘ
 You have answered Yes to one of the questions. Please discuss your entry with one of the staff at reception

Thank You Message on Check-in ⓘ
 Thanks, you checked-in

Show Caution Response ⓘ
☒

Already Checked-in Message ⓘ
 You are already checked in. Do you want to checkout, then please use the button below.

Check-out Form Details

Thank You Message on Check-out ⓘ
 You have successfully checked out. Visit again.

Thank You Message on Check-out

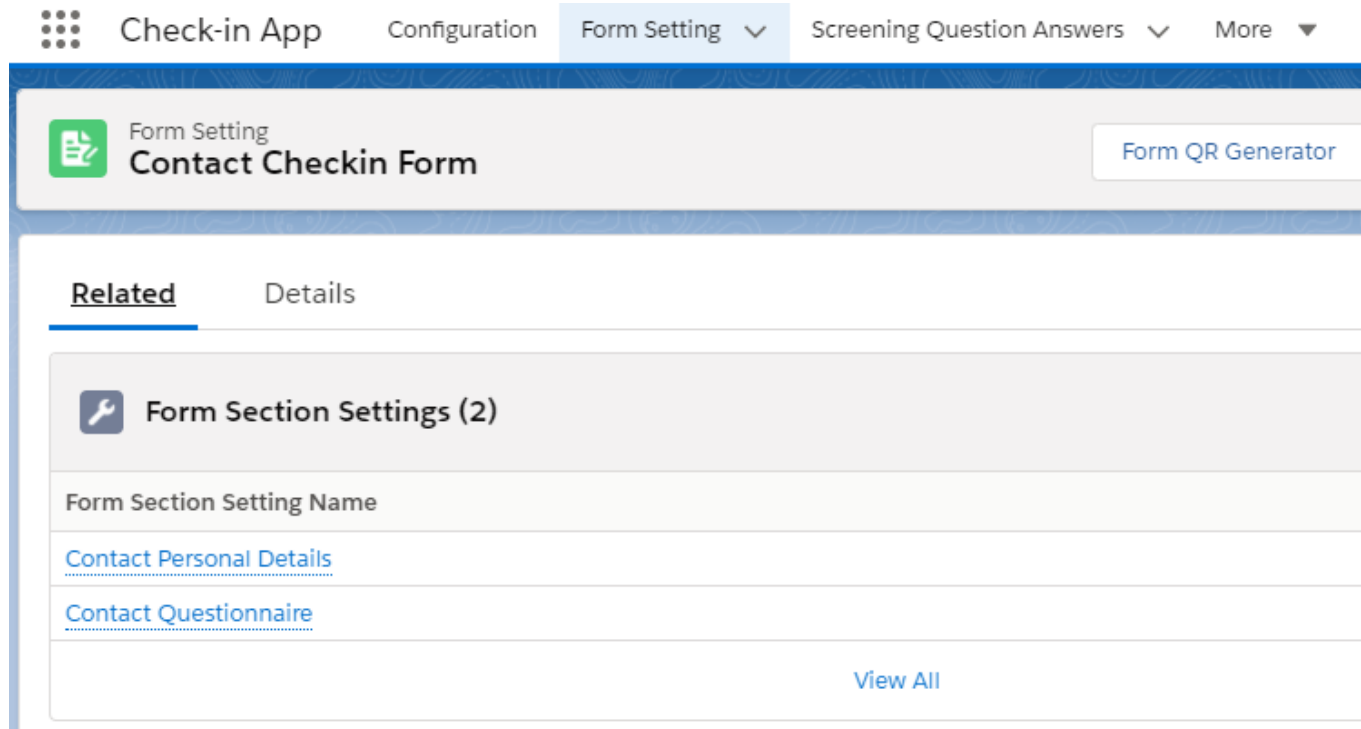
The Thank You Message displayed on the Check-out page. The message can be entered in Rich Text Format.

Form Section Setting

This object record contains the information which we want to show on the form header above personal information fields & section header description above questionnaire sections as explained below in the table below.

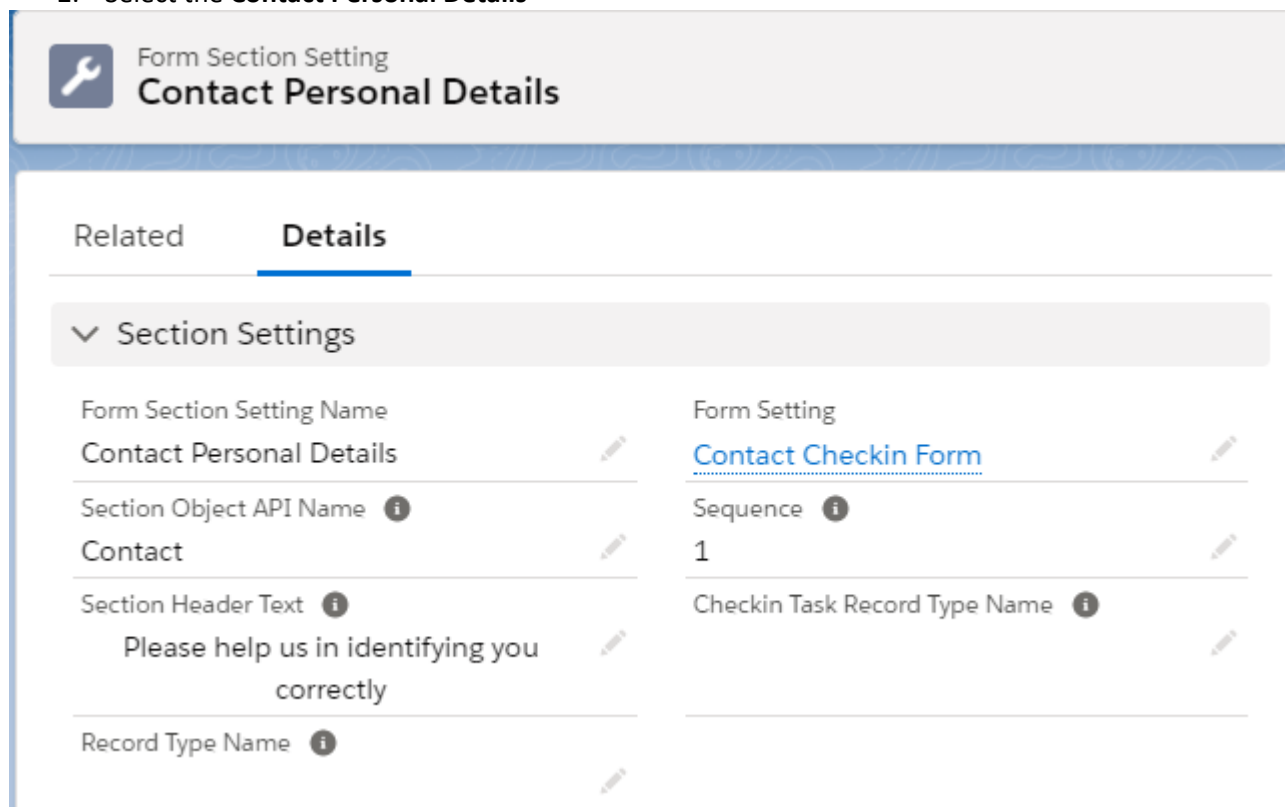
You can configure a new Form Section Setting record for Leads or a Custom App by following the steps below: -

1. From the **Contact Checkin Form** select the **Related** List Tab.



The screenshot shows the 'Form Setting' page for 'Contact Checkin Form'. The top navigation bar includes 'Check-in App', 'Configuration', 'Form Setting' (selected), 'Screening Question Answers', and 'More'. The page header shows 'Form Setting' and 'Contact Checkin Form' with a 'Form QR Generator' button. The 'Related' tab is selected, showing a list of 'Form Section Settings (2)'. The list includes 'Contact Personal Details' and 'Contact Questionnaire'. A 'View All' link is at the bottom right.

2. Select the **Contact Personal Details**



The screenshot shows the 'Form Section Setting' page for 'Contact Personal Details'. The top navigation bar includes 'Form Section Setting' and 'Contact Personal Details'. The page header shows 'Form Section Setting' and 'Contact Personal Details'. The 'Details' tab is selected, showing a table of settings. The table has two columns: 'Form Section Setting Name' and 'Form Setting'. The settings include 'Contact Personal Details', 'Section Object API Name', 'Contact', 'Section Header Text', 'Record Type Name', 'Form Setting', 'Contact Checkin Form', 'Sequence', and 'Checkin Task Record Type Name'.

Form Section Setting Name	Form Setting
Contact Personal Details	Contact Checkin Form
Section Object API Name	Sequence
Contact	1
Section Header Text	Checkin Task Record Type Name
Please help us in identifying you correctly	
Record Type Name	

Form Section Setting Name

The Form selected.

Form Setting

The link to the Form settings detail page

Section Object API Name

The name of the object that the fields in this Section are related to.

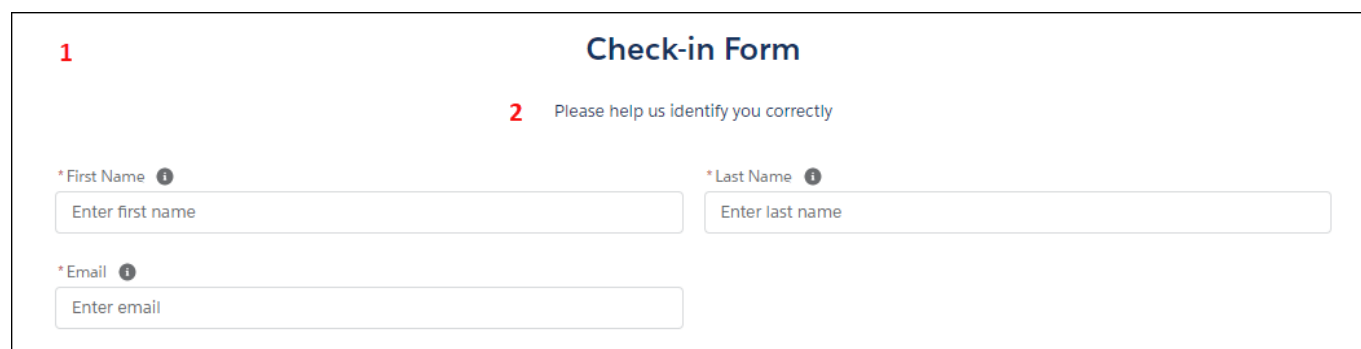
Sequence

Select the order for the Personal Detail section and Screening Questions on the Check-in form.

Section Header Text

The section message displayed on the Check-in form which can be entered in Rich Text Format.

The Check in Form



1. Form Section
2. Section Header Text

Form Setting Name

Form Type Name

This field is a unique field as this field value we are using as a formType parameter for the site page.

If the User wants to render another form in the same org then the user needs to create a new record of this object & pass this field value in parameter.

Record Matching Criteria

The Record Matching Criteria determines which fields on a new record matches the same field on an existing record.

If a match is found the record will be updated or a new record will be created if there isn't a match.

Check-in Site URL This is the Site URL for the Check-in Site page created previously.

Check-in App URL This formula field is a combination of the Check-in Site URL value (above), appended with formtype = Form Type Name field value and the vtype=**Employee**

When copied into a web search your Check-in Form will be rendered

Create Account Name as Contact Name

When selected all new Contacts will have an Account created (Contact FirstName & LastName).

- This option should not be selected if using "Household Account Model" or "Bucket Account" Bucket Account Contacts are automatically assigned to the "Bucket Account" selected.
- This option should not be selected if using "Household Account Model" or "Create Account Name as Contact Name" has been selected.

Form Fields Setting

This object record contains the information which we want to show on the form header above personal information fields & section header description above questionnaire sections as explained below in the table below.

1. From the **Contact Personal Details** record, select the **Related** List Tab.

 Check-in App
 Configuration
 Form Setting ▼
 Screening Question Answers ▼
 More ▼

 Form Setting
 Contact Checkin Form
 Form QR Generator

Related Details

 Form Section Settings (2)

Form Section Setting Name

[Contact Personal Details](#)

[Contact Questionnaire](#)

[View All](#)

2. Select the **Contact Personal Details**

 Form Section Setting
 Contact Personal Details

Related Details

 Form Fields Settings (3)
 New

Form Fields Setting N...	Field API Name	Required	Field Sequence
Contact FirstName	FirstName	☒	1
Contact Lastname	LastName	☒	2
Contact Email	Email	☒	3

[View All](#)

Check-in Form

Please help us identify you correctly

1 *First Name **2** **3**

*Last Name **1**

*Email **1**

1. Form Section
2. Field Label on Form
3. Field API Name

Form Fields Setting Name

Field Placeholder Text

Define the Placeholder Text that appears in the field on the Check-in form.

Help Text

Define custom help text for your fields to provide users with a helpful description.

Field Sequence

The Field Sequence order can be specified on the Check-in form (Left to Right) as required.

Required

When selected a value will be Required in this field in order to Submit a record.

Field Validation Pattern

Caution Response Answer

Enter the Questions Answer that will trigger the Caution Message & Icon on the Confirmation & Check-out Details Form

Show Hotspot List

When selected the Hyperlink for the Hotspot Area a Modal Popup will display next to this Question.

CheckIn/CheckOut Transactions

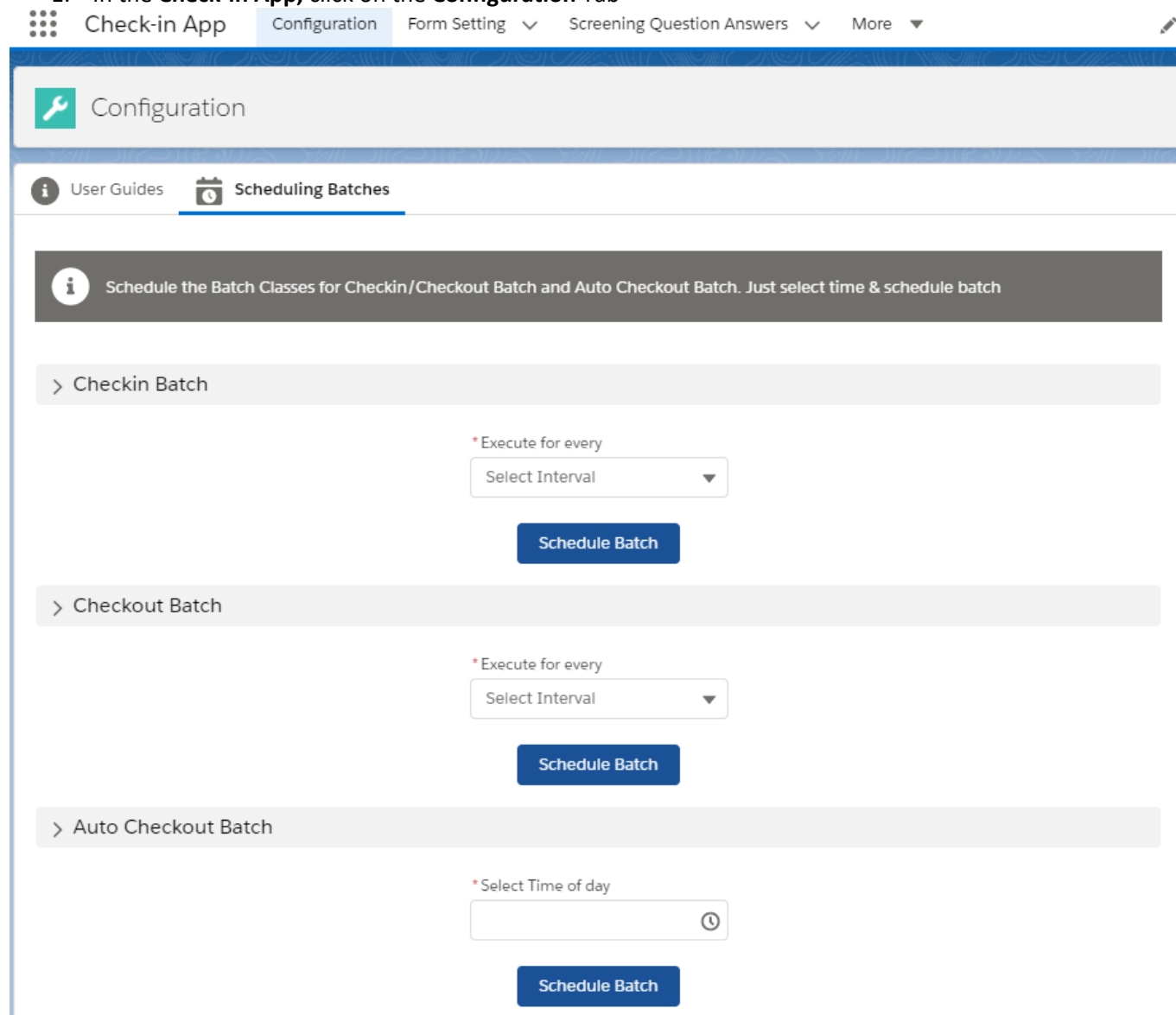
All checkin/checkout requests are stored in DCcheckin__Checkin_Checkout_Transaction__c table. These records are processed by a batch job that is scheduled by the admin

The Configuration Scheduler

The Configuration of the Schedule Batches is where the Account and Contact records for the people Checking In. If your duplicate rules are in place, this is also where existing Account and Contacts will be update with any changes to their contact details (ie: phone number)

The unique required fields for the Check-in App are: First Name, Last Name & Email Address.

1. In the **Check-in App**, click on the **Configuration Tab**



The screenshot shows the 'Check-in App' interface with the 'Configuration' tab selected. The top navigation bar includes 'Check-in App', 'Configuration', 'Form Setting', 'Screening Question Answers', and 'More'. The main header is 'Configuration'. Below it, there are tabs for 'User Guides' and 'Scheduling Batches'. A dark grey banner with an information icon states: 'Schedule the Batch Classes for Checkin/Checkout Batch and Auto Checkout Batch. Just select time & schedule batch'. The interface is divided into three sections for scheduling:

- Checkin Batch:** Includes a dropdown menu labeled '* Execute for every' with 'Select Interval' selected, and a blue 'Schedule Batch' button.
- Checkout Batch:** Includes a dropdown menu labeled '* Execute for every' with 'Select Interval' selected, and a blue 'Schedule Batch' button.
- Auto Checkout Batch:** Includes a text input field labeled '* Select Time of day' with a clock icon, and a blue 'Schedule Batch' button.

2. For the Checkin Batch, under ***Execute for every**, click on the **Select Interval** drop down and select the time intervals between batch process

> Checkin Batch

* Execute for every

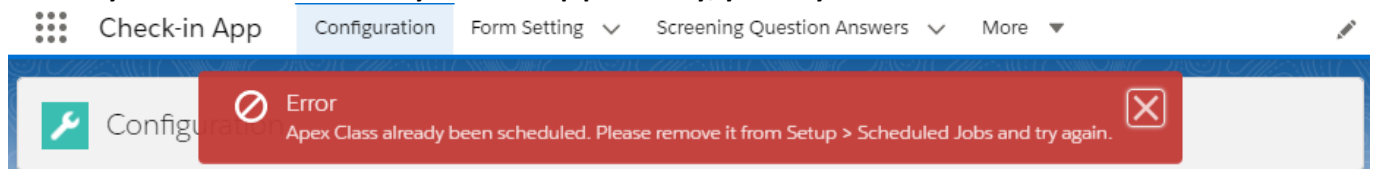
Select Interval ▼

- 10 min
- 15 min
- 30 min
- 1 hour

> Checkout Batch

3. And click on the **Schedule Batch** button
4. Now do the repeat the steps for the **Checkout Batch** and the **Auto Check out Batch**

Note: If your batches have already been set up previously, you may see this error



Verify CheckIn Batch Processed the record

When the Checkin Processor processes the record the status on the record will be set to processed.

1. To view your Checkin/Checkout Logs, click on the **Checkin/Checkout Transaction tab**

Check-in App Configuration Form Setting **Checkin/Checkout Transaction...** * More

Checkin/Checkout Transactions

All  

4 items • Sorted by Checkin Checkout Transaction Name • Filtered by All checkin/checkout transactions • Updated a few seconds ago

Search this list...

New Import Change Owner Printable View

	☐ Checkin Che... ↑ ↓	Form Setting ↓	Base Obj... ↓	Visitor Type ↓	Record Type ↓	Status ↓	
1	☐ CHK-000000	Contact Checkin Form	Contact	Employee	Checkin	Processed	▼
2	☐ CHK-000001				Checkout	Processed	▼
3	☐ CHK-000002	Contact Checkin Form	Contact	Employee	Checkin	Processed	▼
4	☐ CHK-000003				Checkout	Processed	▼

2. You can also, edit the **List view** to show the fields as you'd like to view them

	☐ Checkin C... ↑ ↓	Visitor Ty... ↓	Record T... ↓	Checkin Date/Time ↓	Checkout Date/Time ↓	Status ↓	
1	☐ CHK-000000	Employee	Checkin	28/4/2021, 3:11 PM		Processed	▼
2	☐ CHK-000001		Checkout		28/4/2021, 3:11 PM	Processed	▼
3	☐ CHK-000002	Employee	Checkin	30/4/2021, 10:19 AM		Processed	▼
4	☐ CHK-000003		Checkout		30/4/2021, 10:19 AM	Processed	▼

3. To view the records of the people checking in, click on the **Checkin Checkout Transaction Name**

	☐ Checkin C... ↑ ↓	Visitor Ty... ↓	Record T... ↓	Checkin Date/Time ↓	Checkout Date/Time ↓	Status ↓	
1	☐ CHK-000000	Employee	Checkin	28/4/2021, 3:11 PM		Processed	▼
2	☐ CHK-000001		Checkout		28/4/2021, 3:11 PM	Processed	▼
3	☐ CHK-000002	Employee	Checkin	30/4/2021, 10:19 AM		Processed	▼
4	☐ CHK-000003		Checkout		30/4/2021, 10:19 AM	Processed	▼

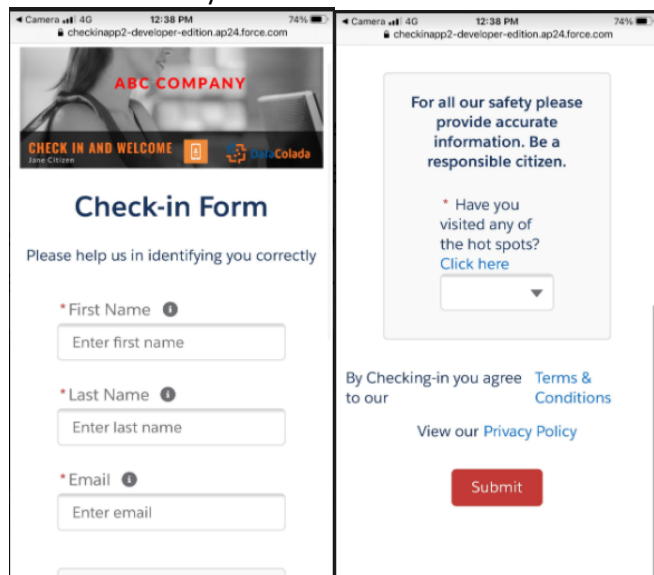
Testing the Check in App

We can use the QR Code file stored above to launch our check in app.

1. Click on the **Related Tab** and scroll down to the **Files** section.
2. Click on the **Employee Form QR Code jpg** file
3. Using the **Camera app** on your **mobile device**, scan the QR code and select the App Link popup, which will send you to the check in app landing.



4. Enter in your contact details and click on the **Submit** Button



Camera 4G 12:38 PM 74%

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ABC COMPANY

CHECK IN AND WELCOME 

Jane Citizen

Check-in Form

Please help us in identifying you correctly

*First Name 

Enter first name

*Last Name 

Enter last name

*Email 

Enter email

Camera 4G 12:38 PM 74%

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For all our safety please provide accurate information. Be a responsible citizen.

* Have you visited any of the hot spots?
[Click here](#)

By Checking-in you agree [Terms & Conditions](#) to our

[View our Privacy Policy](#)

Submit

5. You should see the confirmed details Page and the **Check In** button

Have you visited any of the hot spots?: **No**

☒ I confirm that all details are correct

[Add Guest](#)

[Edit](#) [Check In >](#)

6. After Checking In, you will see the Confirmed Checkin Page with the **Check Out** button



Brad OLoughlin 

Thanks, you checked-in
at 28/04/2021, 02:38 am

[Check Out](#)

Checkin/Checkout Transactions

7. To review the list of people checking In and Out, click on the **Checkin/Checkout Transaction Tab**

 [Check-in App](#) [Configuration](#) [Form Setting](#) [Screening Question Answers](#) [Checkin/Checkout Transaction...](#) [Transaction](#)

Checkin/Checkout Transactions					
New Import Check					
4 items • Sorted by Checkin Checkout Transaction Name • Filtered by All checkin/checkout transactions • Updated a few seconds ago					
	Checkin Checkout T...	Form Setting	Base Object Name	Visitor Type	Record Type
1	☐ CHK-000000	Contact Checkin Form	Contact	Employee	Checkin
2	☐ CHK-000001				Checkout
3	☐ CHK-000002	Contact Checkin Form	Contact	Employee	Checkin
4	☐ CHK-000003				Checkout

8. To view the contact details of the person checking in, click on the **Checkin Checkout Transaction ID**

9. Click on the **Contact Name** and then the **Related tab**

Customizing the Email Templates

The email templates need to be customized per user's needs.

Four custom email templates have been provided and need to be altered.

- Caution Email
- Contact check in Successful
- Lead check In Successful
- PersonAccount check in

About us & support

About Us

Established in 2014, DataColada is a Salesforce.org Premium Partner.

We apply the art and science of personalisation, prediction and platform to engage customers. At our core, our deep expertise in data science, design and devops allows for unique and exceptional customer experiences across all devices. We extend your digital value chain by connecting you to your customers, partners and suppliers over all digital channels.

At DataColada, we deliver digital 'systems of engagement' on Salesforce!

Contacting Customer Service & Support

Our Support Team from DataColada are here to help with any Check-in App issues, questions or assistance you may require.

Web: www.datacolada.com

Email: support@datacolada.com