'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.

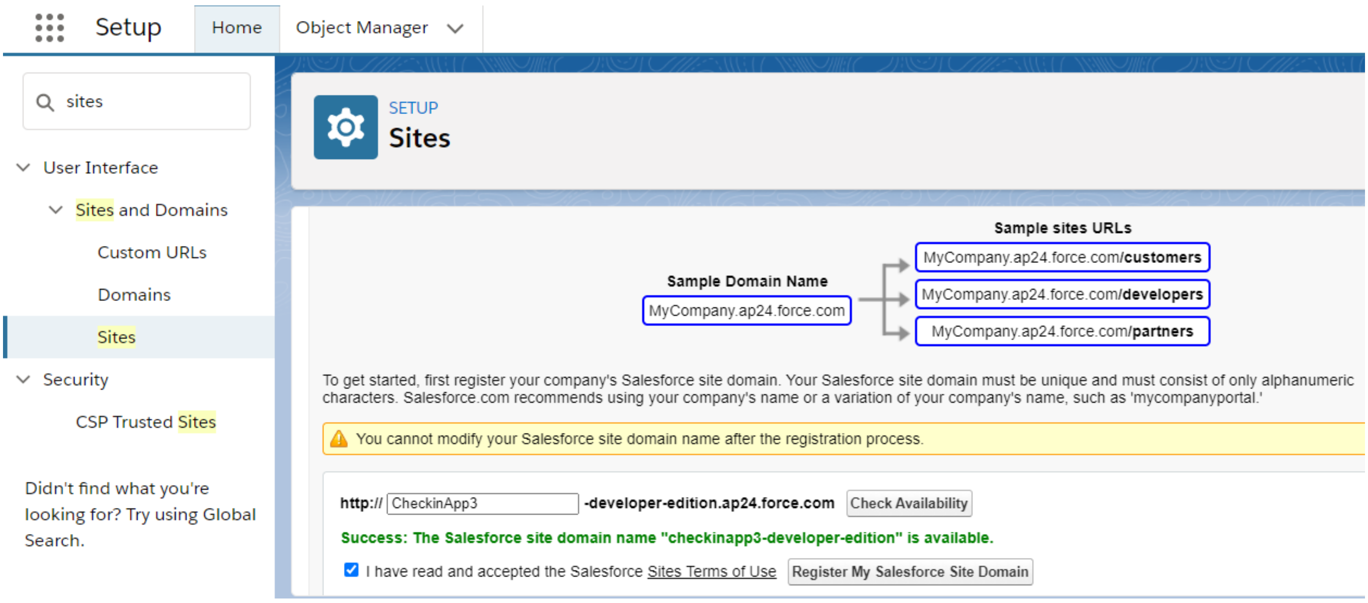
Table of Contents

Preparation for Installing Check-in App

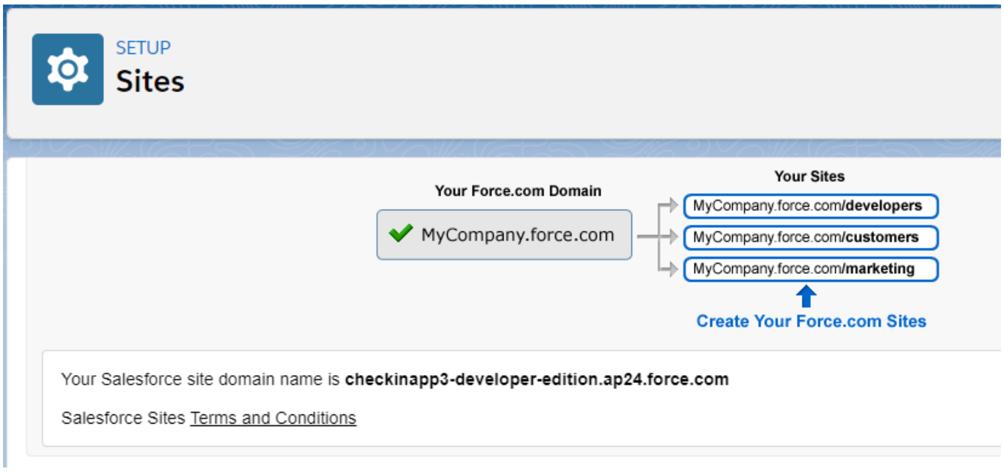
Create the Site Domain

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



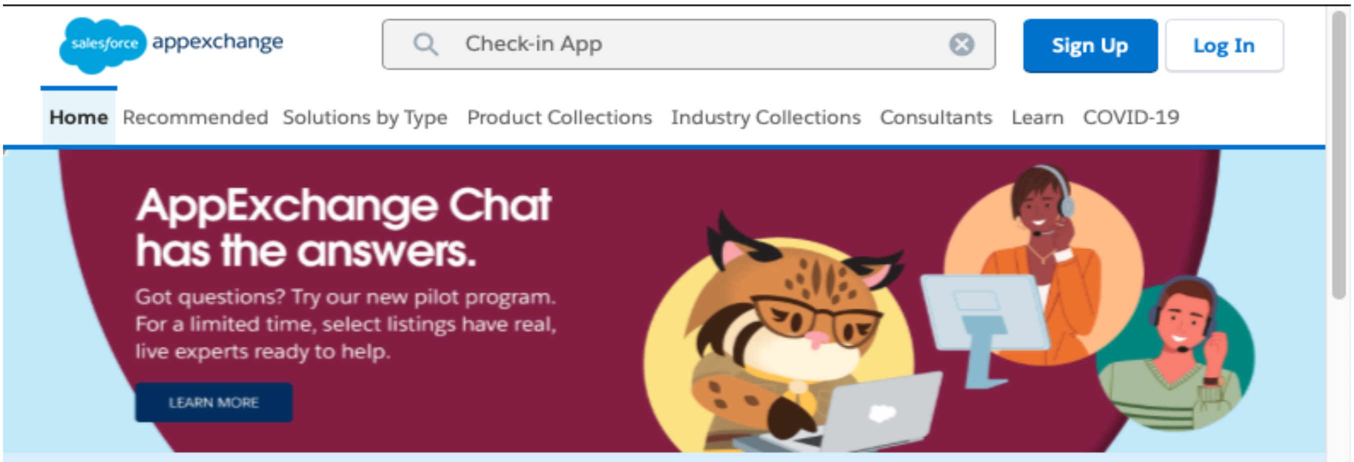
Congratulations, you now have the Site Domain Registered and ready to download your copy of the Check-in App from the App Exchange.



Installing the Check-in App

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

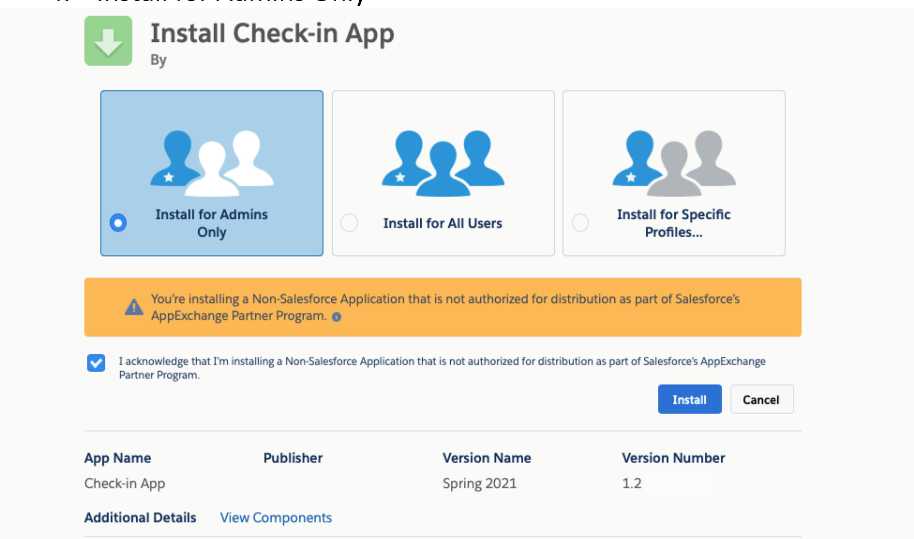
1. Sign into your Salesforce Org, and click on the **AppLauncher**.
2. Now click on the **AppExchange** button
3. Search for **'Check-in App'** and use the "**Get it Now**" option to install.



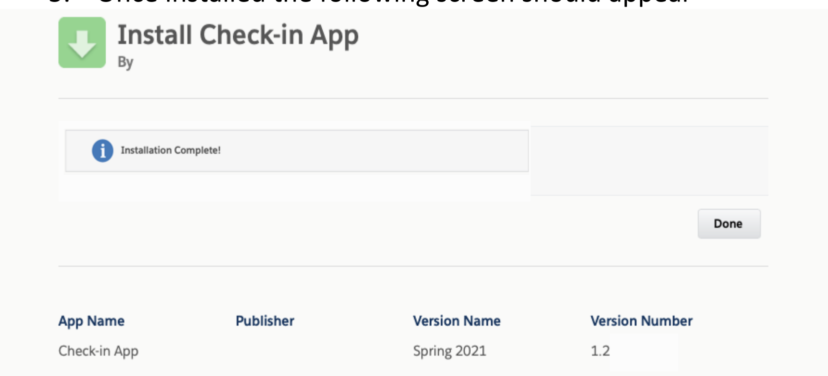
Installing the application

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

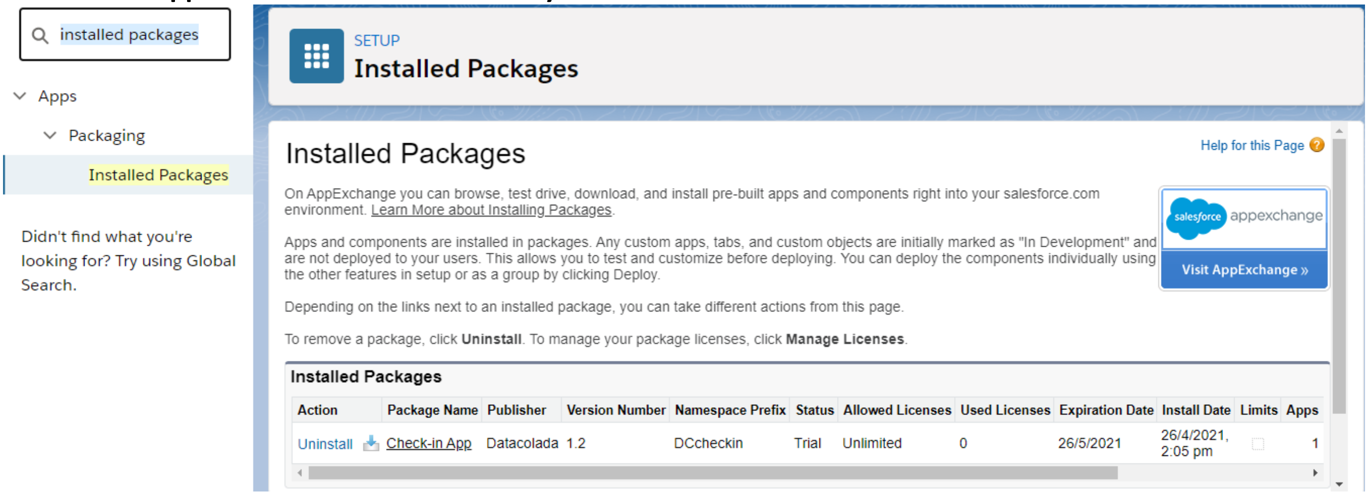
4. Install for Admins Only



5. Once installed the following screen should appear



Confirm the application has been successfully installed



Configuring the Application

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

Salesforce Sites

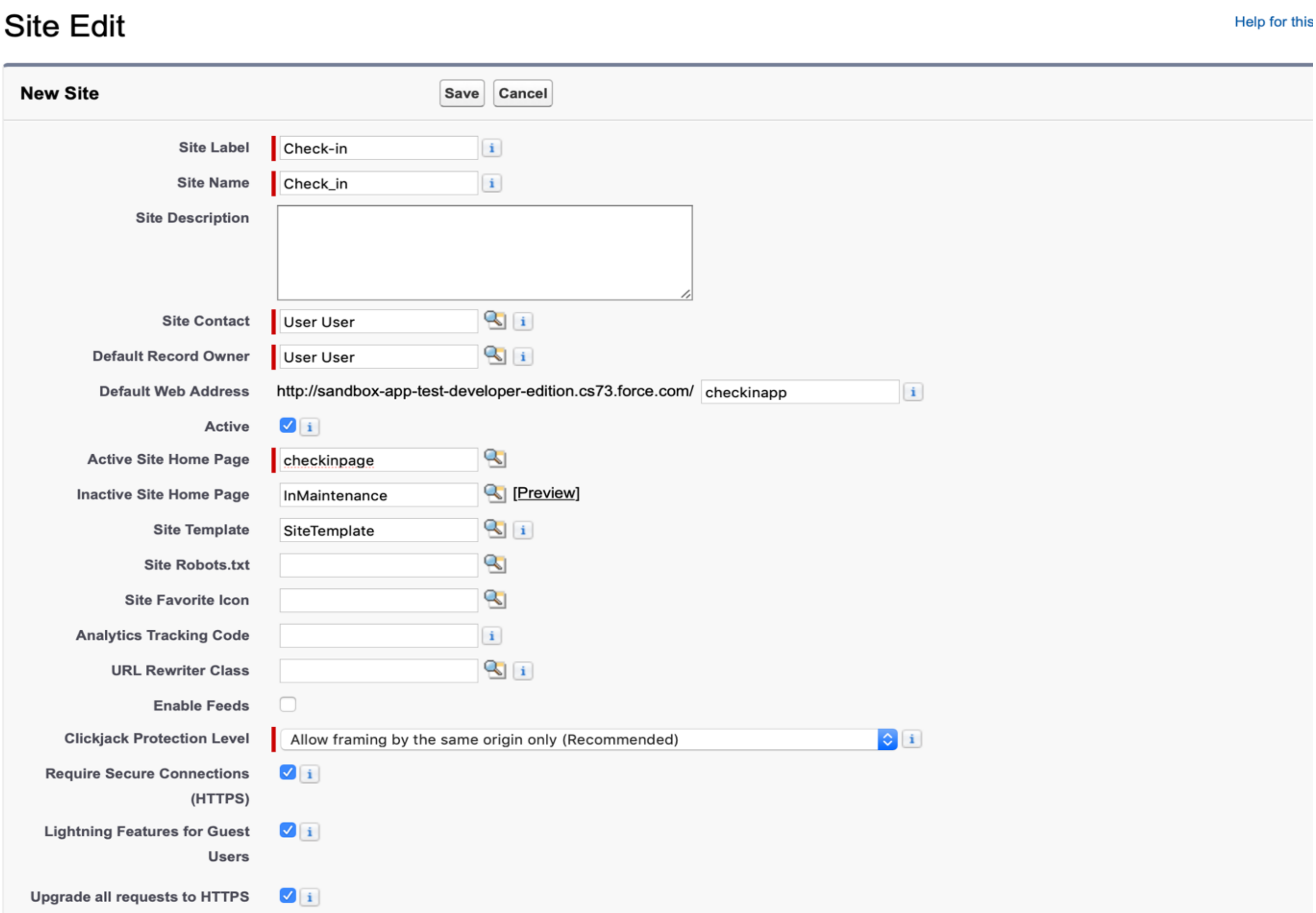
The **'Check-in App'** uses Salesforce Sites to create a public website that is directly integrated with your Salesforce organisation.

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.



8. Click on **Save.**

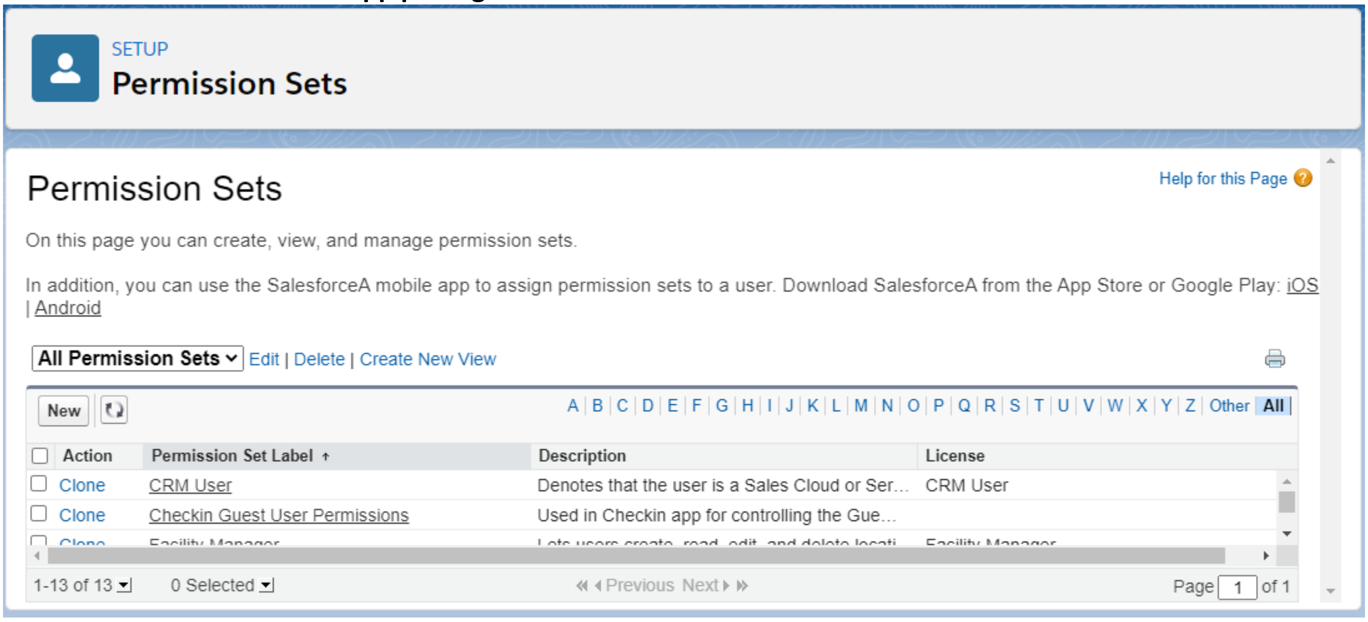
NOTE: To review the 'Check-in App' Site URL, click on the Sites page in the setup menu and scroll down to the Sites section at the bottom of the page.

Create a new Permission Set

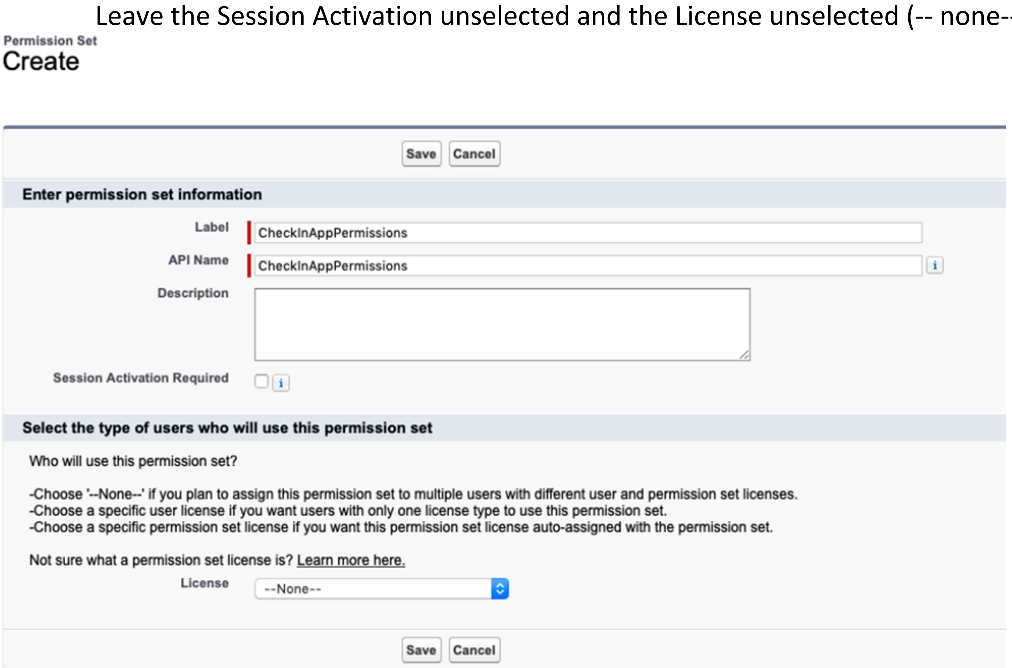
In this section we will be:

- 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



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--)

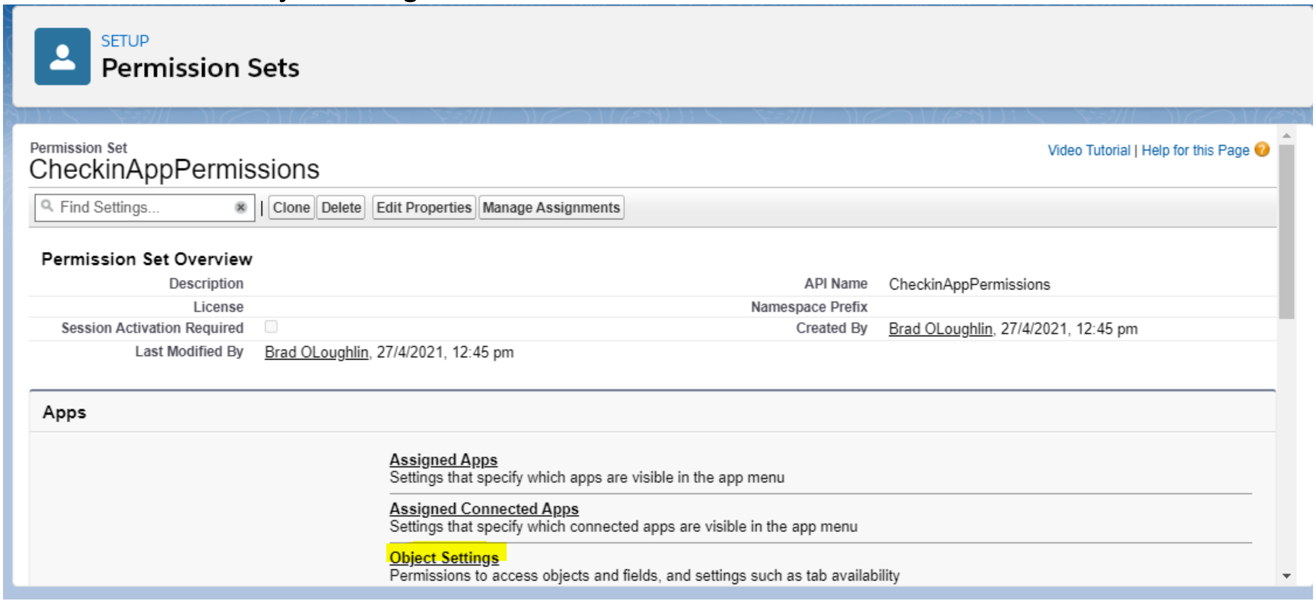


4. Click **Save**

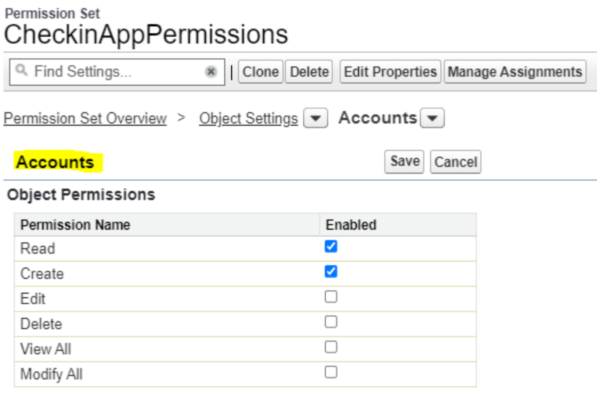
Edit the Object Settings

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

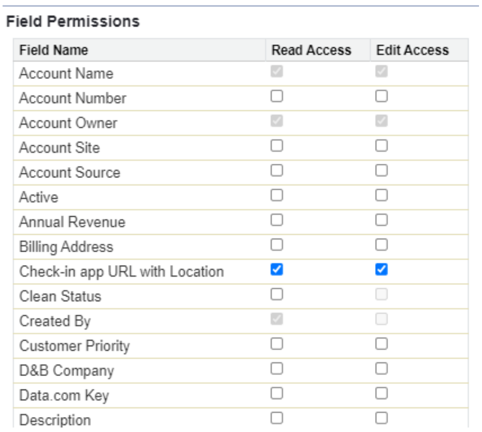
1. Click on the **Object Settings**



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

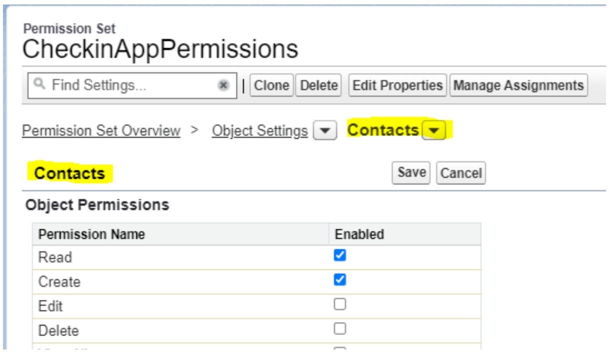


4. In the **Field Permission** section below, give **Read Access** and **Edit Access** to the Fields required

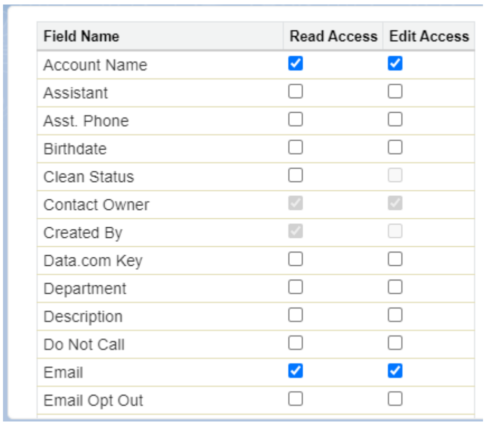


5. Then click **Save**

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

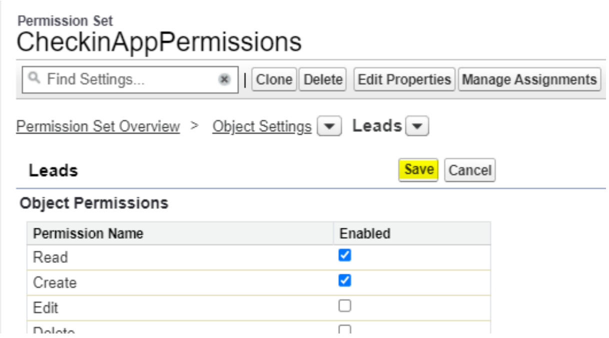


8. In the **Field Permission** section below, give **Read Access** and **Edit Access** to all Fields required

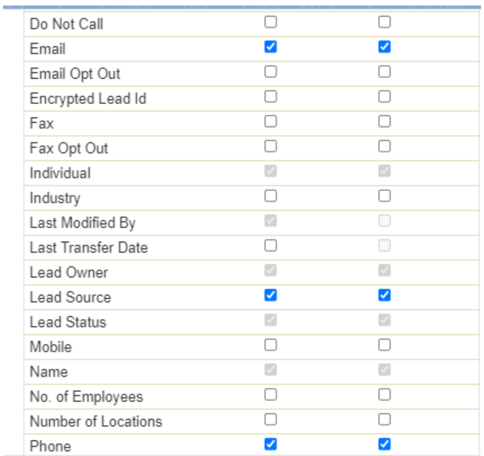


9. Then click **Save**

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

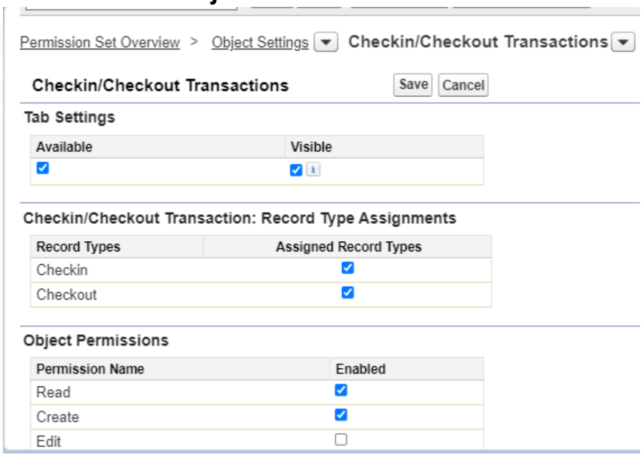


12. In the **Field Permission** section below, give **Read Access** and **Edit Access** to all Fields required



13. Then click **Save**

14. Now click on the **Checkin/Checkout Transactions Object** and click on the **Edit button**
15. In the **Tabs 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)**



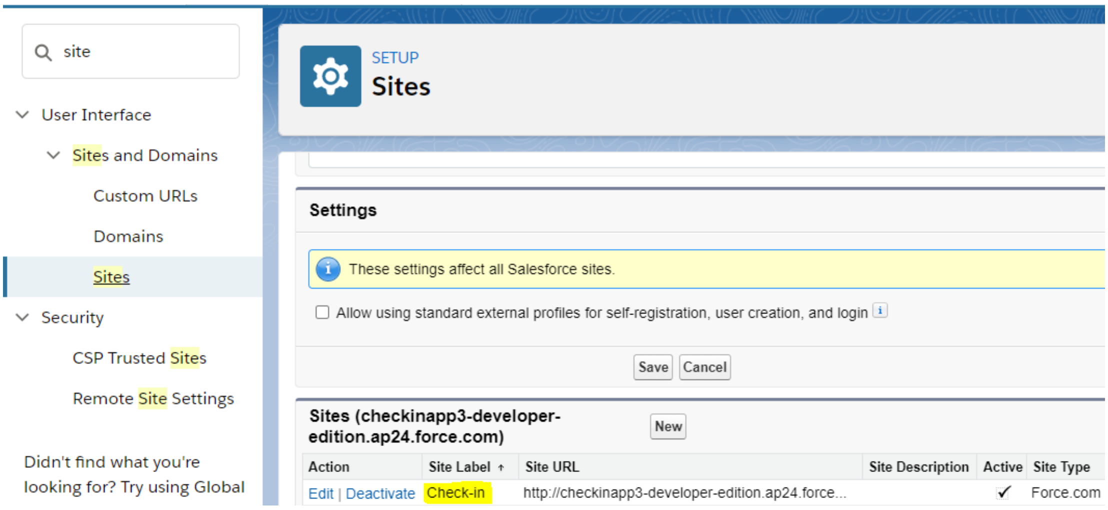
18. Then click **Save**

Site Permissions (Public Access Settings)

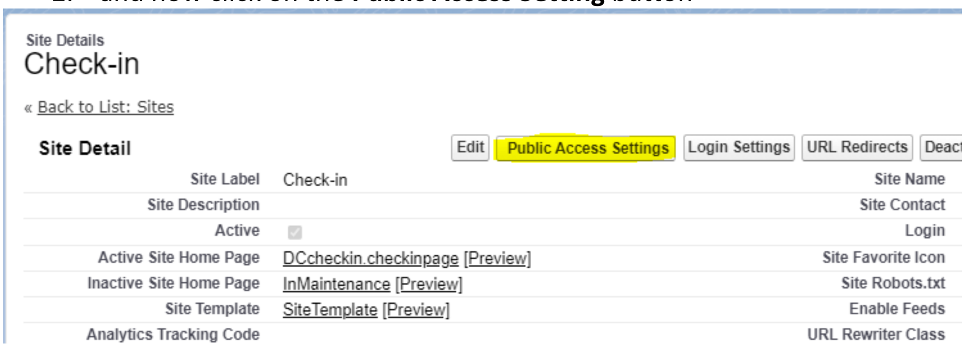
We need to assign the **permission set: CheckinAppPermission** to the **public site guest user**.

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

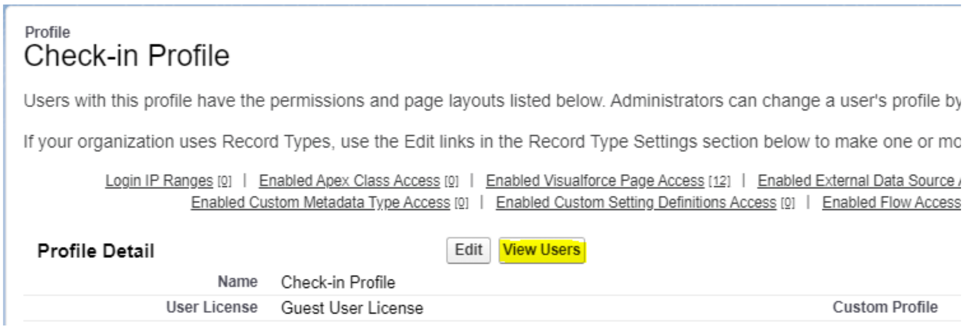
1. Click on the Site Label name: **Check-in**



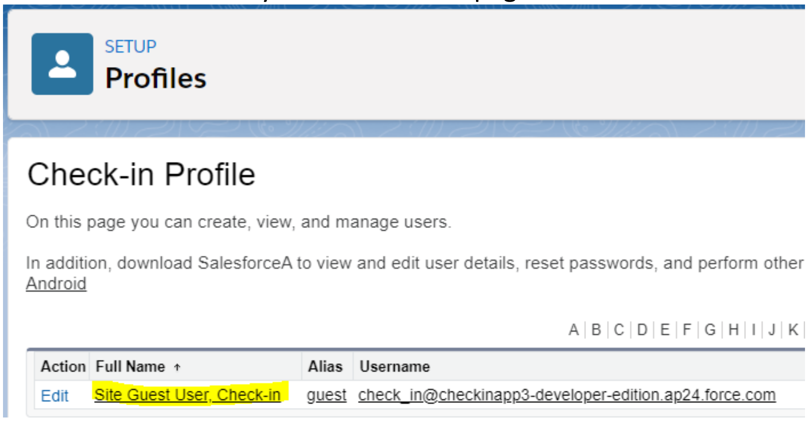
2. and now click on the **Public Access Setting** button



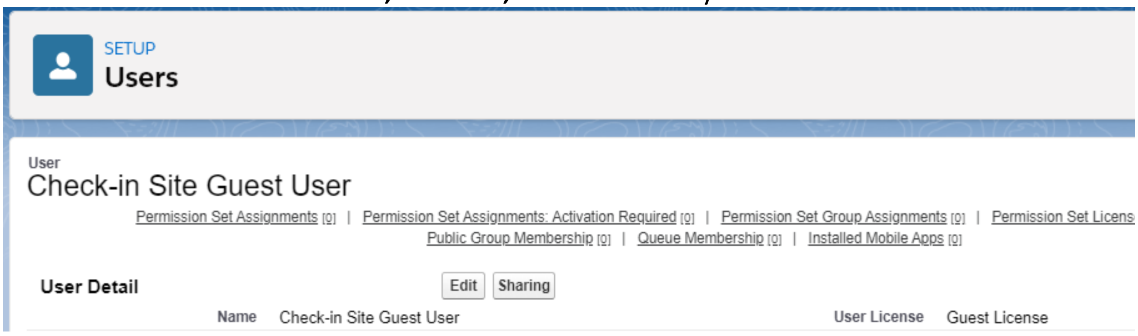
3. Click on the **View Users** button



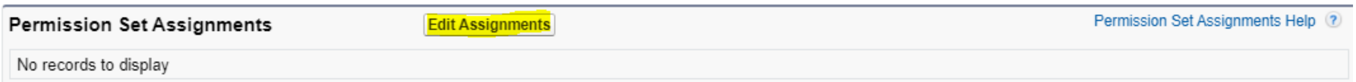
4. This will take you to the Profile page for the Check-in Profile.



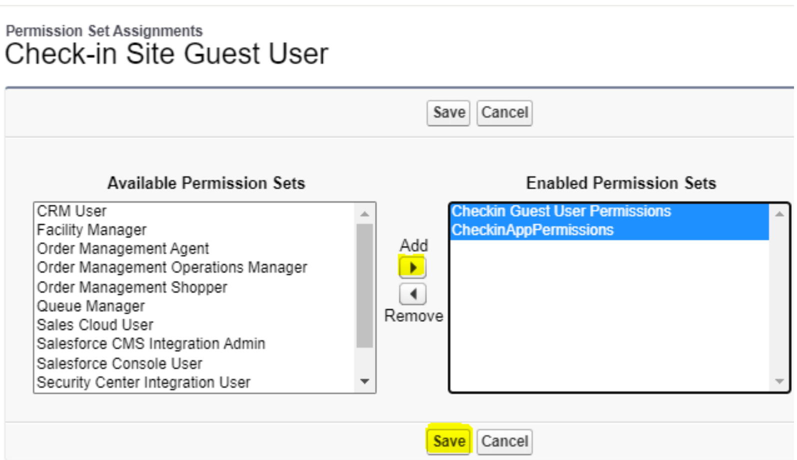
5. Click on **Site Guest User, Check-in,** which will take you to the **User: Checkin Site Guest User Page**



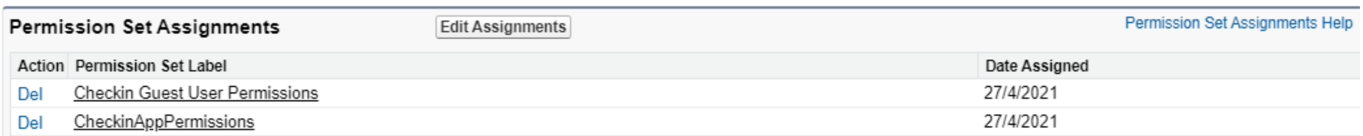
6. On the **USER: Check-in Site Guest User page**, scroll down to the **Permission Set Assignment** and click **Edit Assignments**.



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



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

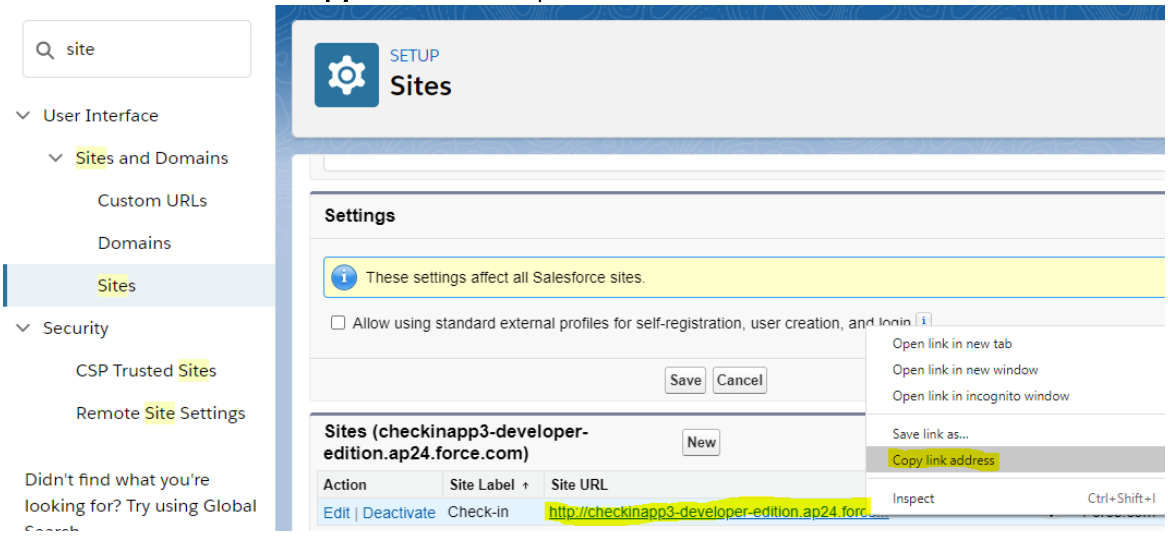


Custom Metadata Settings

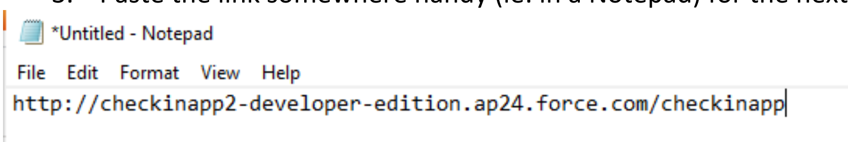
Ensure the **Check In site Base URL** matches the **'Check-in'** Site domain you have created earlier.

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

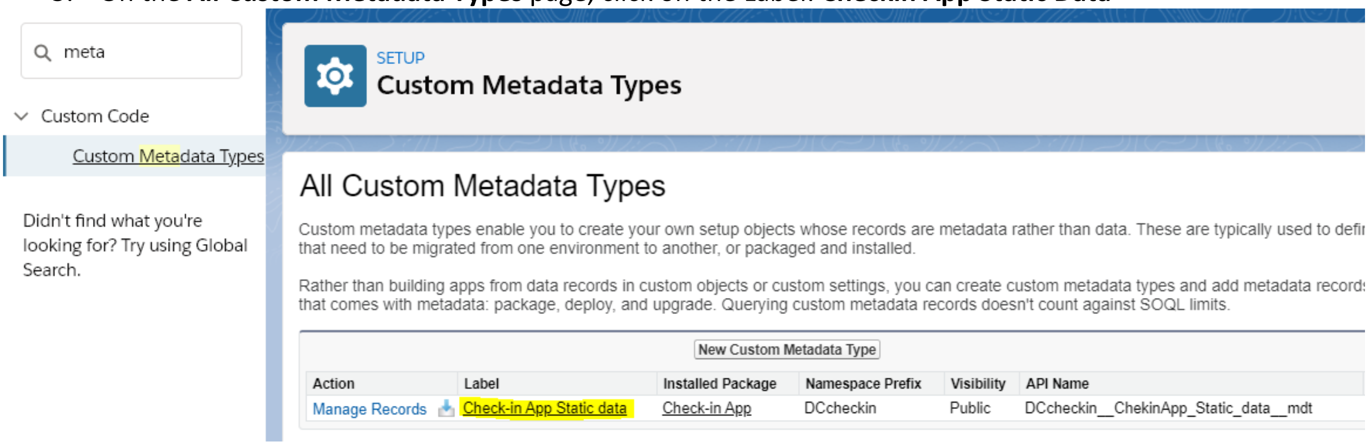
1. Go to Setup, enter **Sites** in the Quick Find box, then select **Sites**.
2. Scroll down to the bottom of the page and right click on your **Check-in Site URL Link** and click on the **Copy Link Address** option.



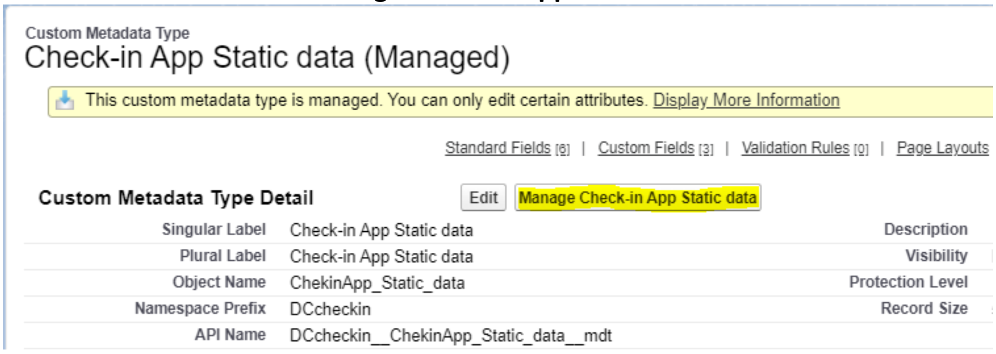
3. Paste the link somewhere handy (ie: in a Notepad) for the next step.



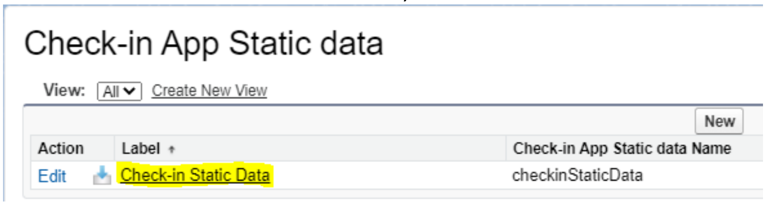
4. In **Setup**, search and select the **Custom Metadata Types**
5. On the **All Custom Metadata Types** page, click on the Label: **Checkin App Static Data**



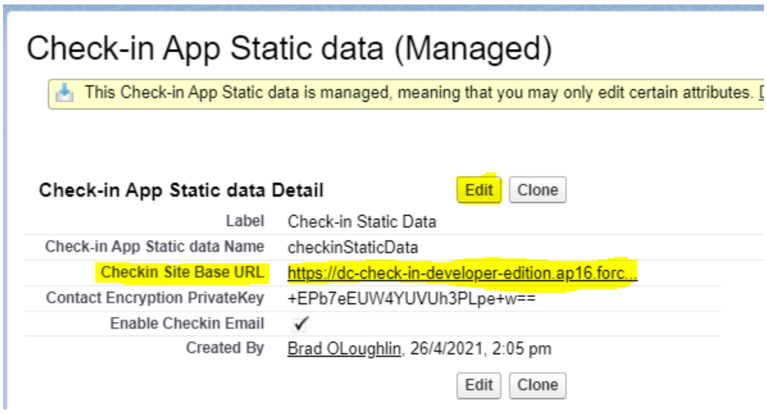
6. Now click on the **Manage Check-in App Static Data** button



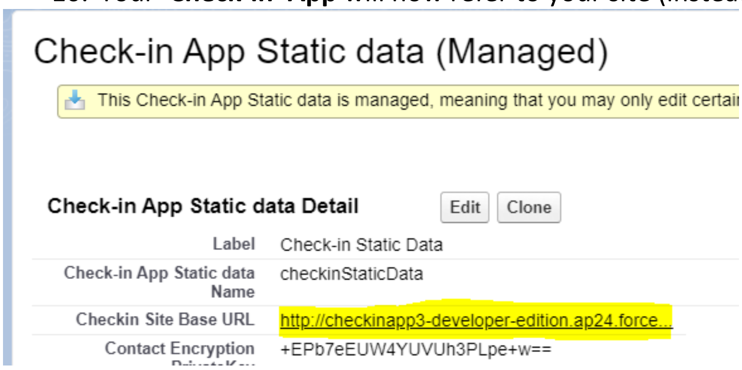
7. And then under the Label, click on the **Check-in Static Data** link



8. On the Check-in App Static Data page, click on the **edit** button
9. 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**



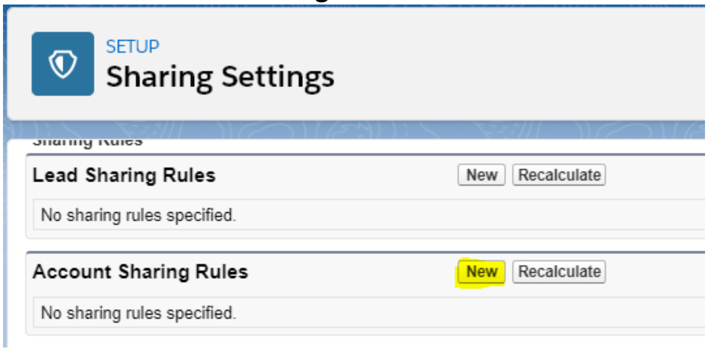
10. Your **'Check-in' App** will now refer to your site (instead of ours)



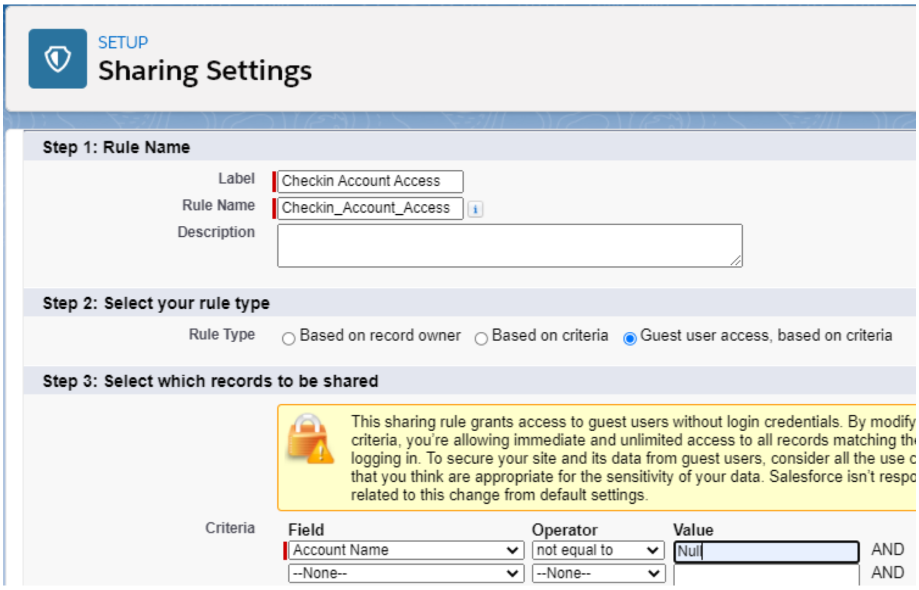
Sharing Setting Rules

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**:

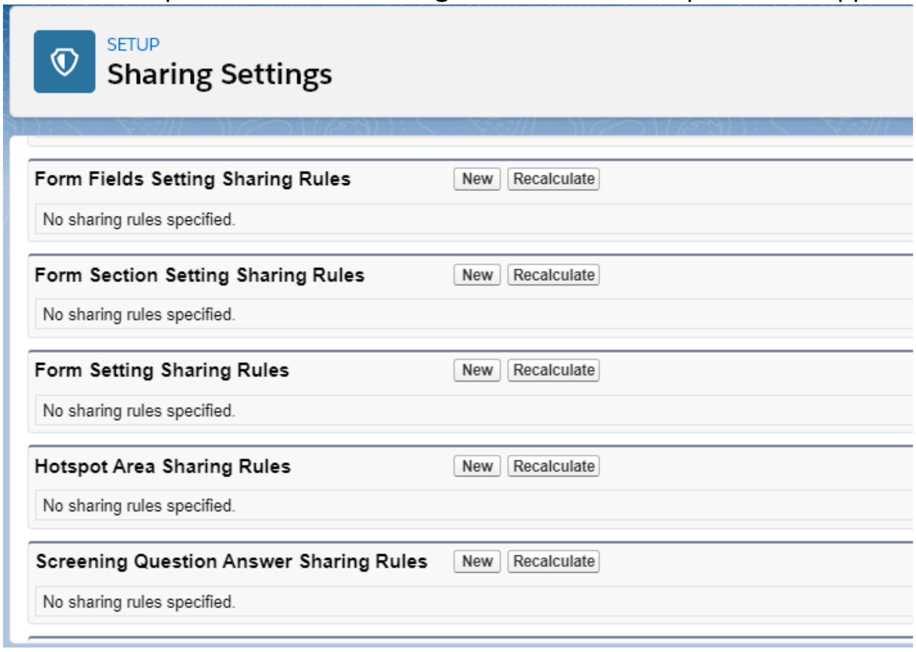


1. Click on the **New** button, and enter the following
   Label: **Checkin Account Access**
   Rule type: **Guest user access, based on Criteria**
   Field: **Account Name**
   Operator: **Not equal to**
   Value: **Null**

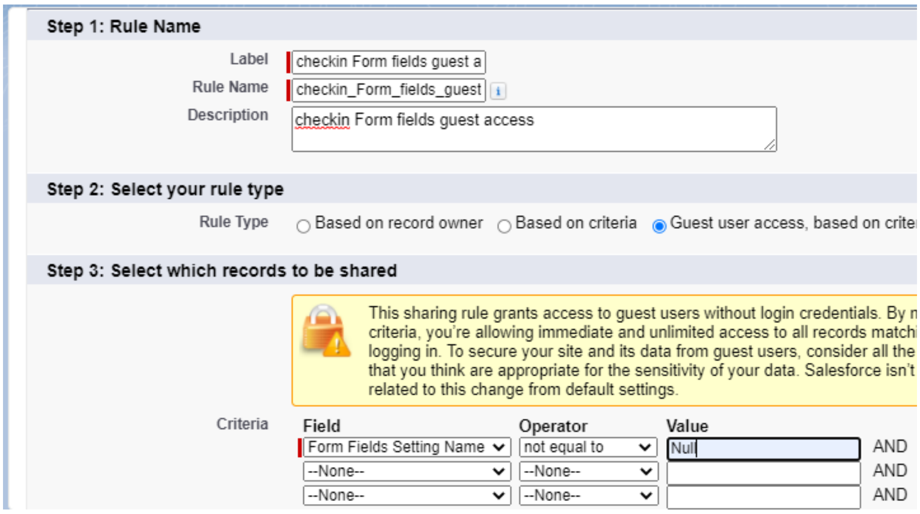


2. and click **Save**

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

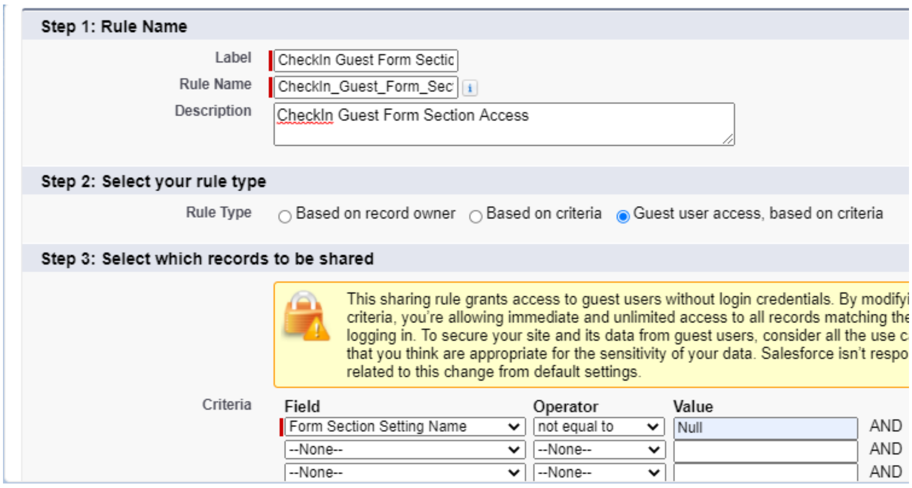


3. Scroll down to the very bottom section to **Form Fields Setting Sharing Rules**:
4. Click on the **New** button, and enter the following
   Label: **Checkin Form Fields Guest Access**
   Rule type: **Guest user access, based on Criteria**
   Field: **Form Fields Setting Name**
   Operator: **Not equal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



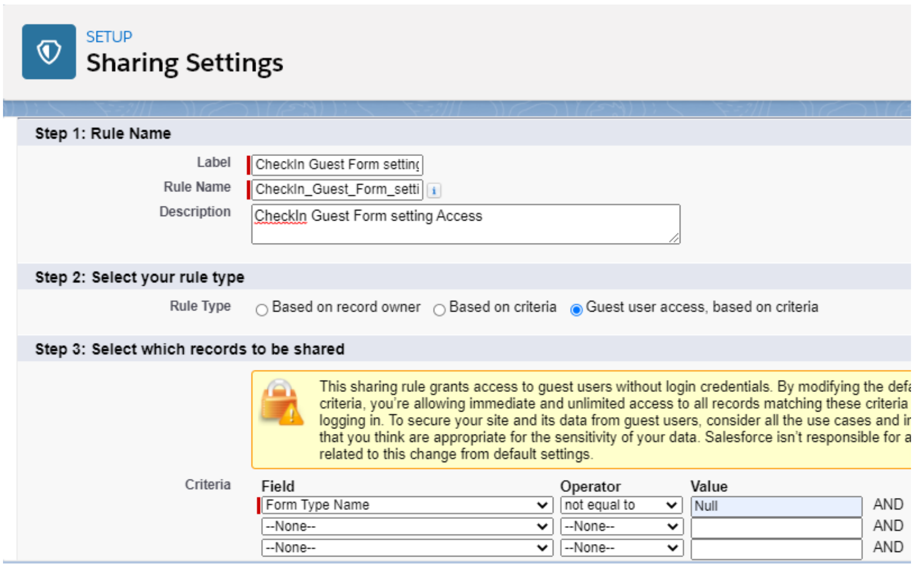
5. and click **Save**

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**



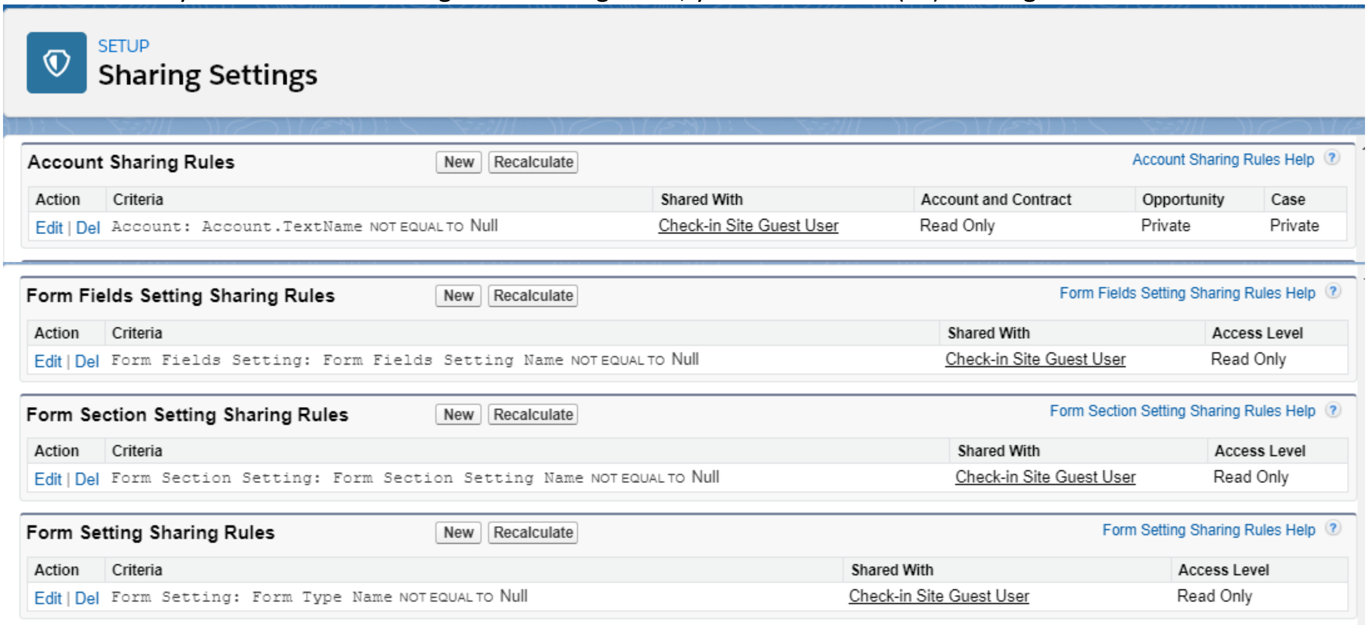
8. and click **Save**

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**



11. and click **Save**

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 NOT EQUAL TO 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 NOT EQUAL TO 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 NOT EQUAL TO 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 NOT EQUAL TO Null	Check-in Site Guest User	Read Only

Check-in App Settings

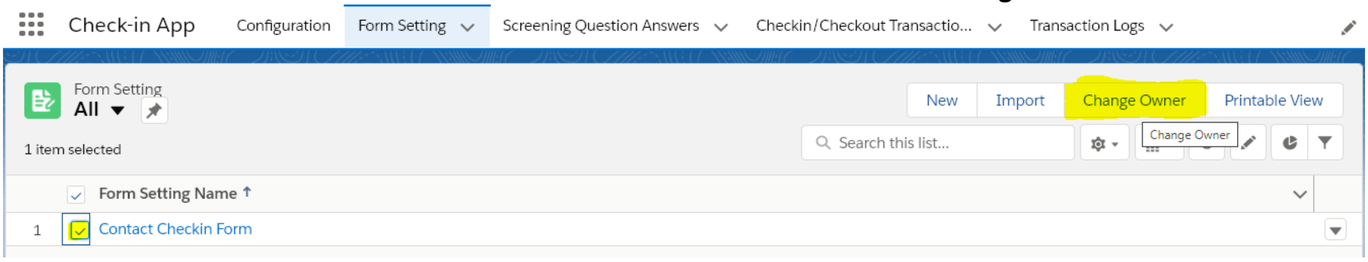
Change the ownership of the Forms and Fields

By default, the ownership is “**CheckInApp**” so this needs to be changed by the admin.
We need to change the owner ship 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:

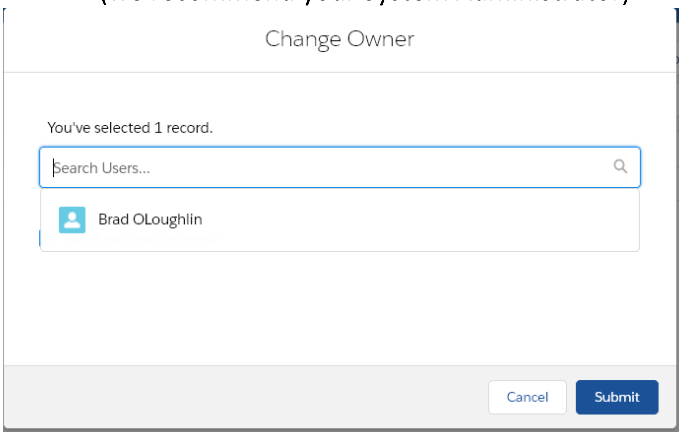
- **Contact CheckIn form** (and its related list’s and related fields)
- **Contact Personal Details** (and its related list’s and related fields)
- **Contact Questionnaire** (and its related list’s and related fields)

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



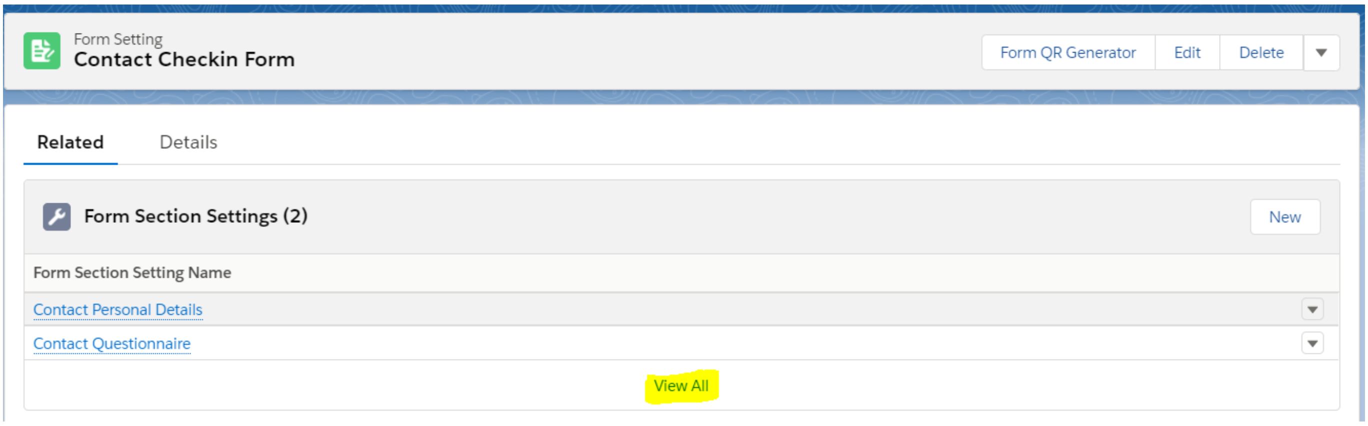
5. Now select the new **owner** of the records for the Checkin App (we recommend your System Administrator)

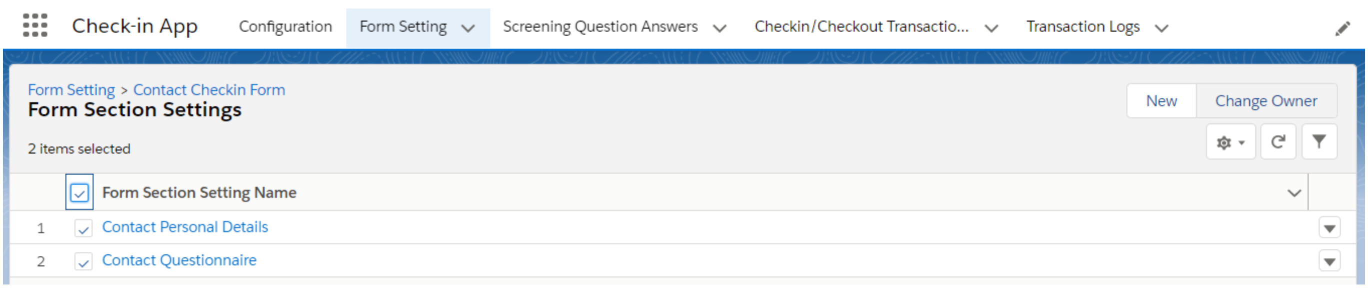


6. And click on the **Submit** button

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

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

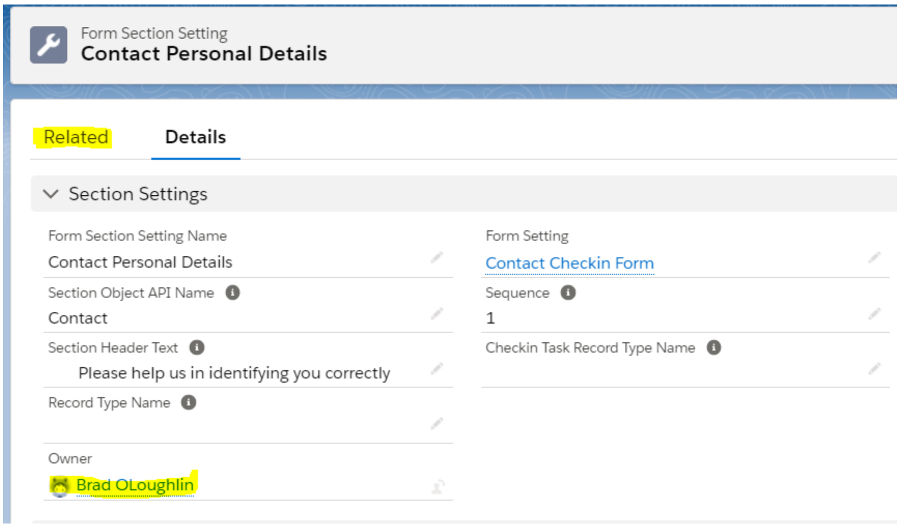




2. Click on the checkboxes for the (x2) Form Section Setting Name and click on the **Change Owner** button
3. Now select the designated **User** (as per the previous step)

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**

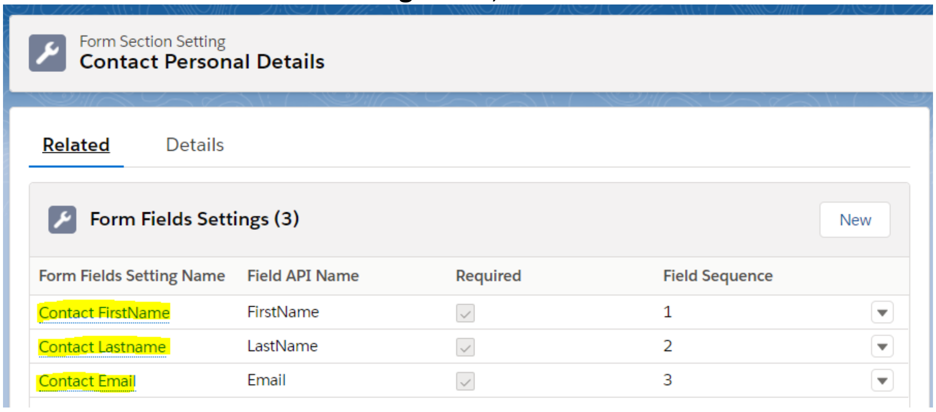


NOTE: If you are not seeing the fields in the details tab, try clicking on the refresh button in your browser.
NOTE: If you are not seeing the **Owner Field,** you may have to add the **owner field** to the following page layouts:

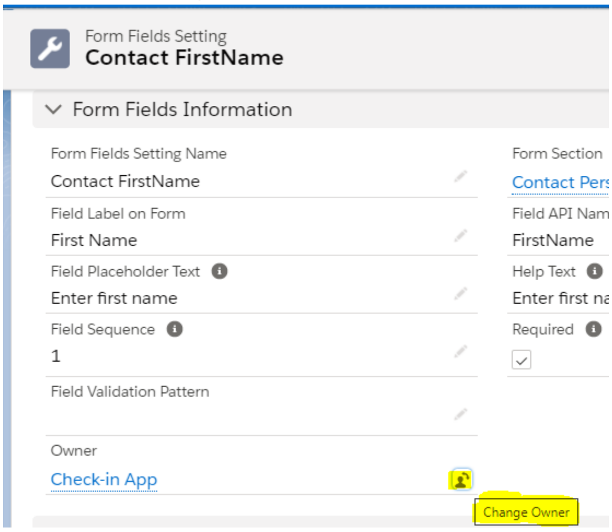
- Form Fields Setting
- Form Section Settings
- Form Setting

Change the Field Ownership

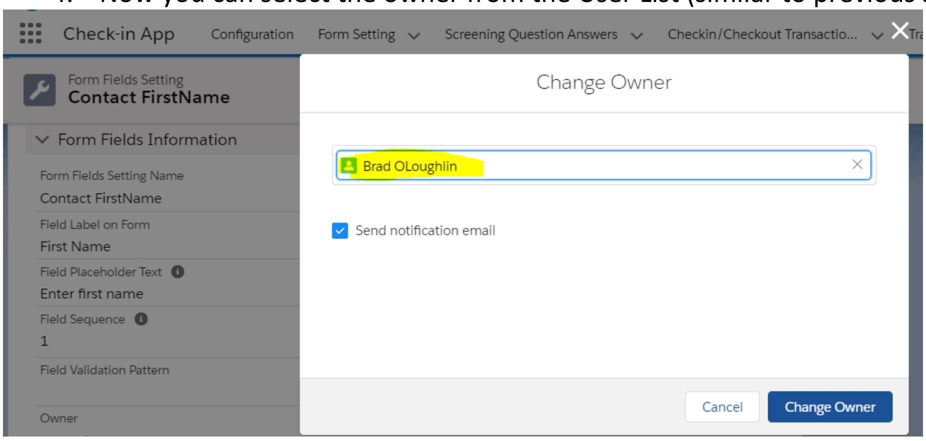
1. In this next step, we will be changing the **Owner** of the **Fields**
2. Under **Form Fields Setting Name**, click on the **Contact FirstName**



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



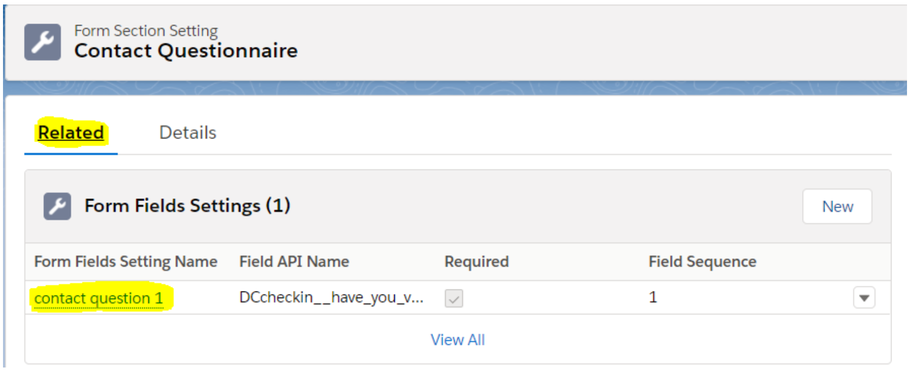
4. Now you can select the owner from the User List (similar to previous steps)



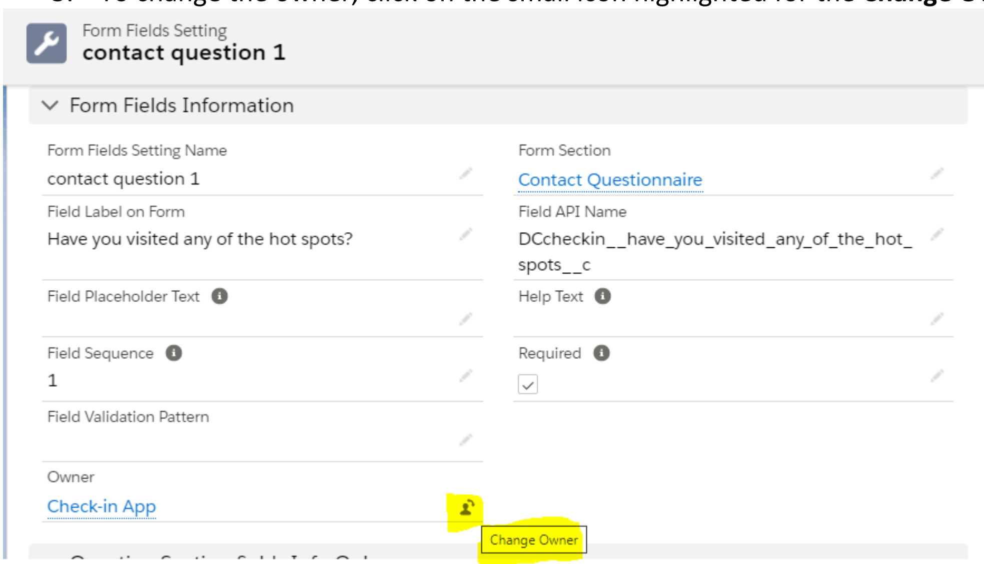
5. And click on the **Change Owner** button
6. You can click on the **Go Back button** in your browser to return to the previous page.
7. Now repeat these steps for the other 2 Fields
   Contact LastName
   Contact Email

Now we need to change the ownership for the **Contact Questionaire** 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**



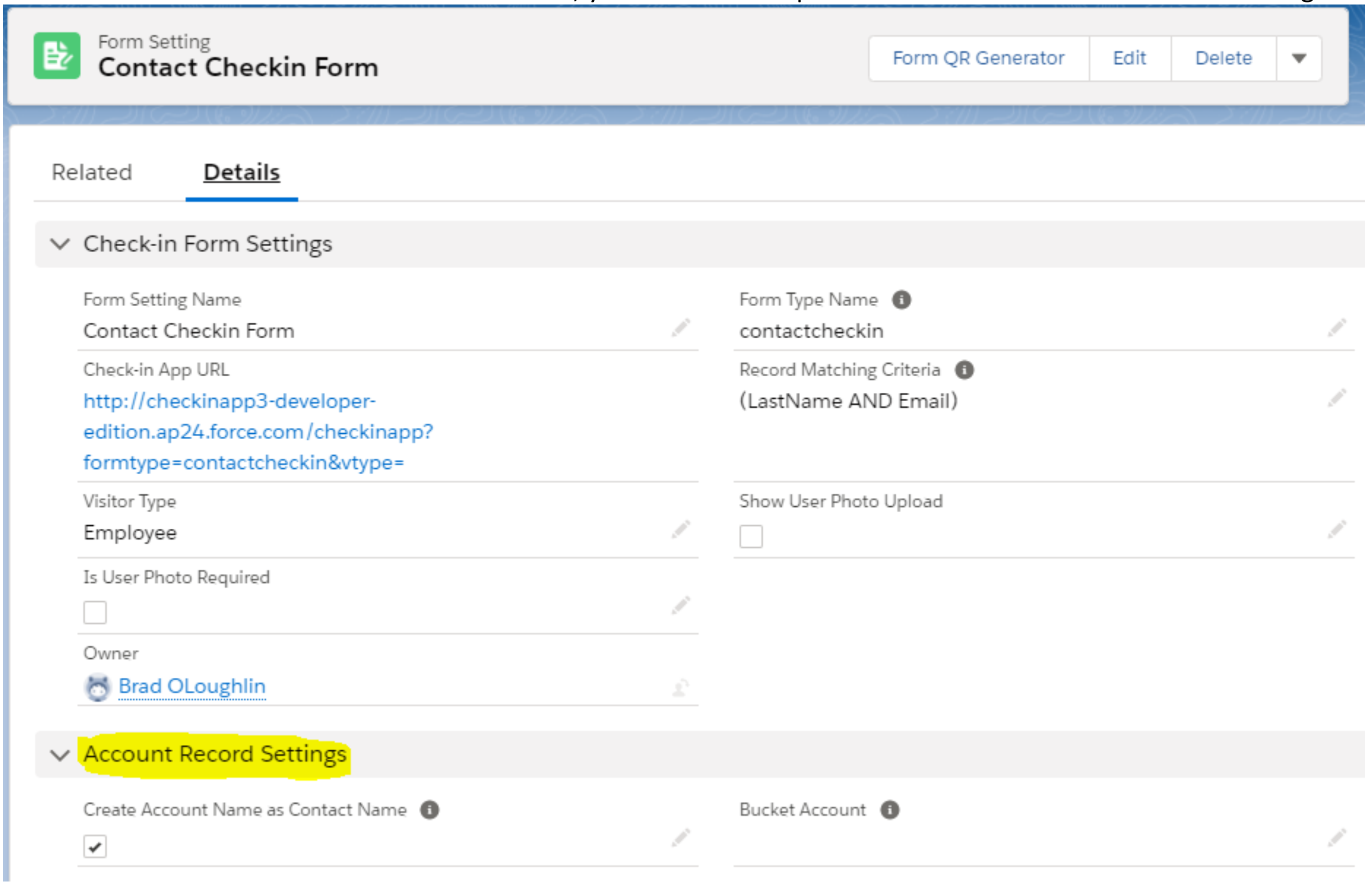
5. To change the owner, click on the small icon highlighted for the **Change Owner** option to appear.



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 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.

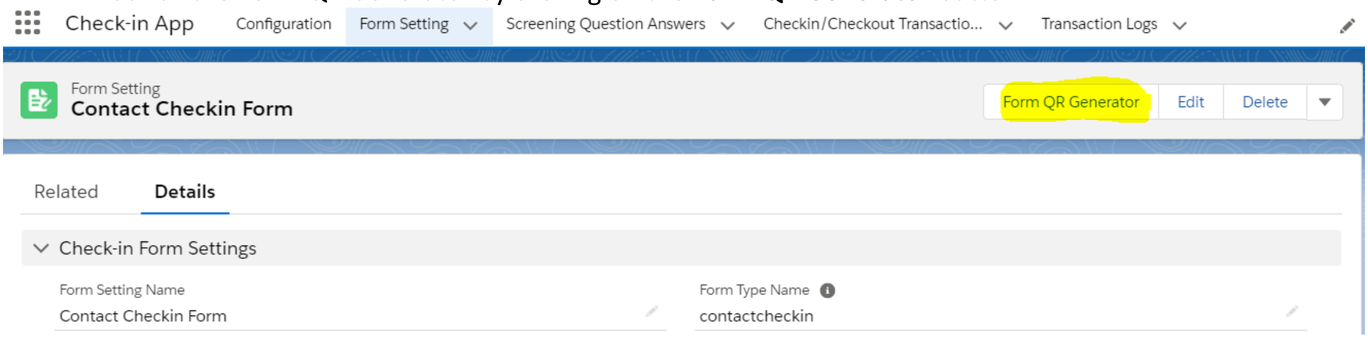
Lightning App Form Details

The Checkin Form

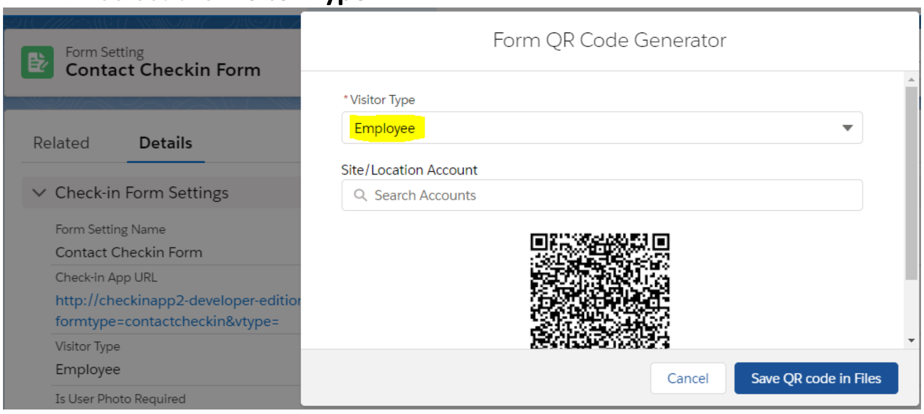
We are almost there, now its time to set up the **QR Code.**

Setting up the Form QR Generator

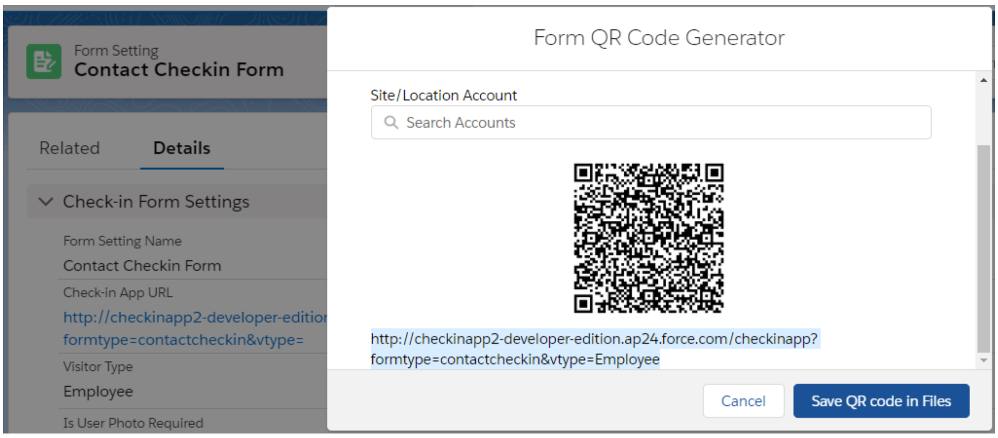
1. To Generate a QR Code we use the form QR Generator that is located on the **Form Settings Page**.
2. Launch the Form QR Generator by clicking on the **Form QR Generator** button



1. select the **Visitor Type**

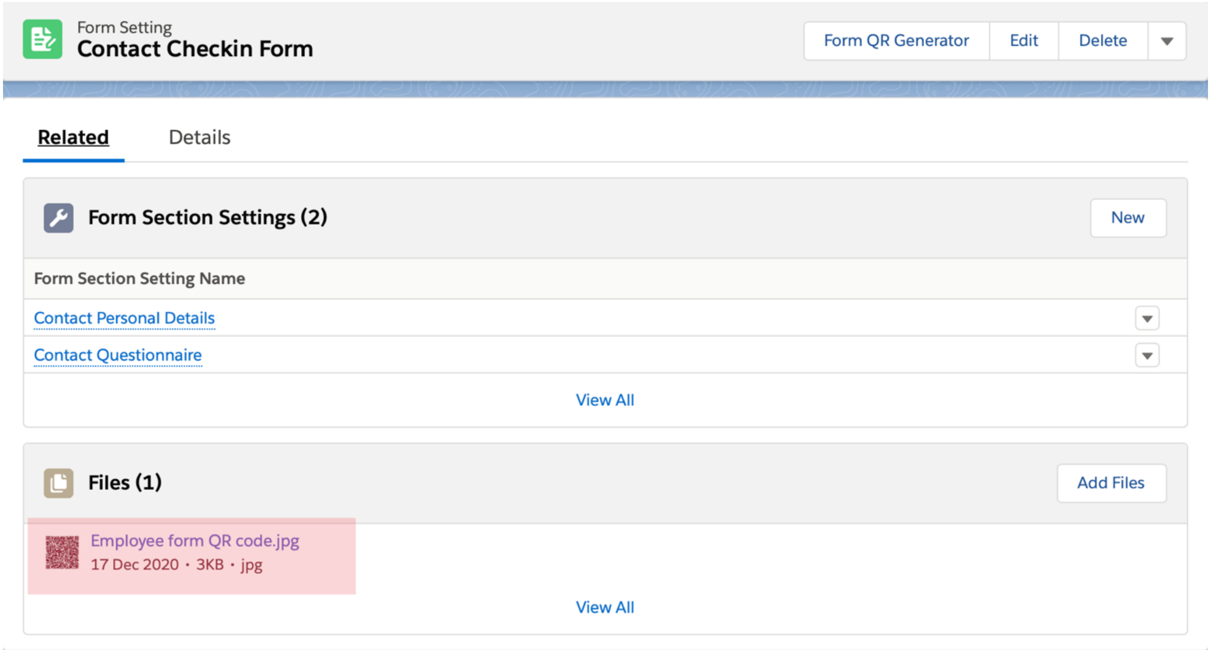


NOTE: At this stage, we highly recommend that you test the Check-in App URL, to ensure you are on track. Just below the QR Code image, copy the **Checkin Page URL** just created and paste the URL into a new incognito browser. If the check-in page appears, your setup has been successfully completed.
If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

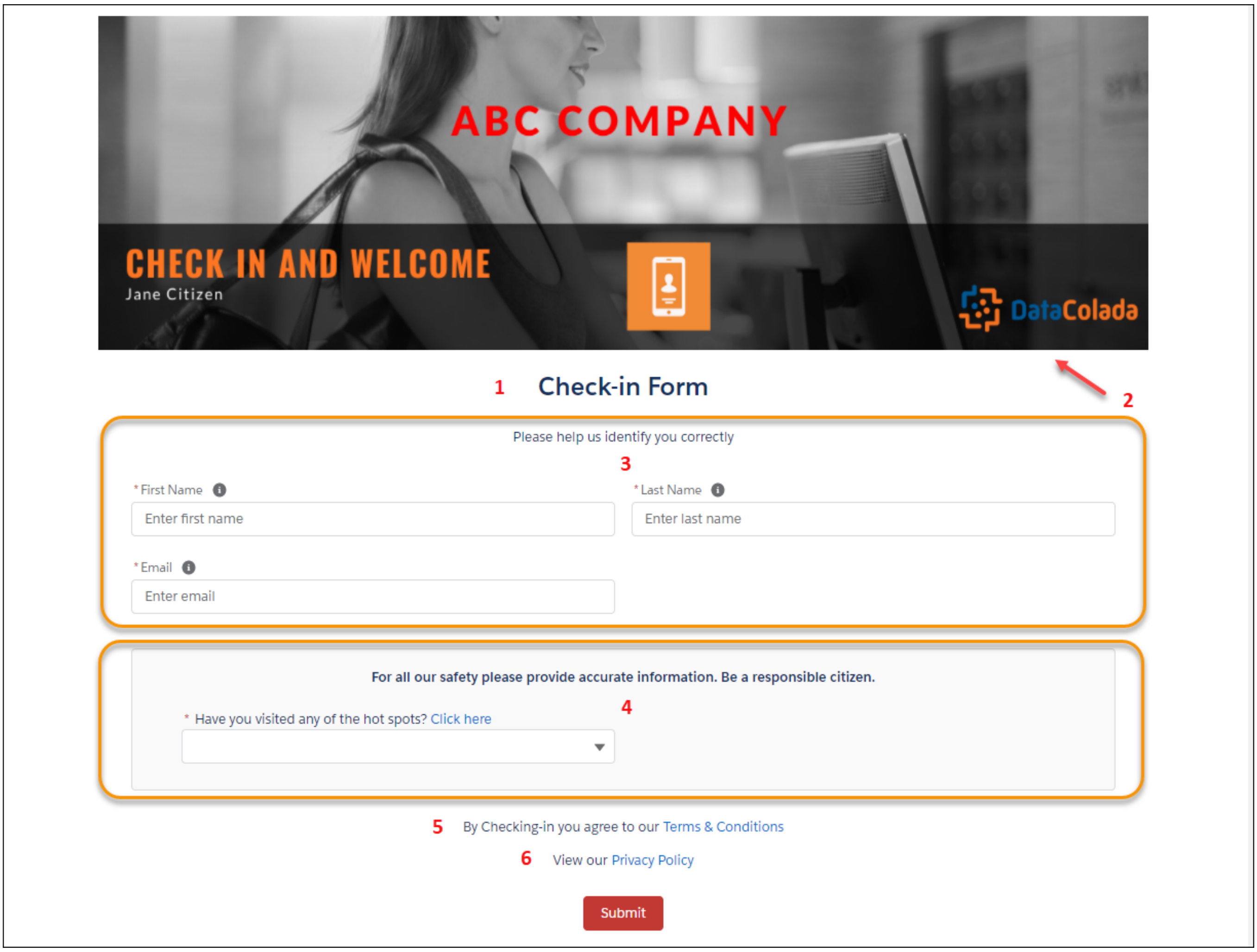


2. Now you can click on the **Save QR Code in Files** button.

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.



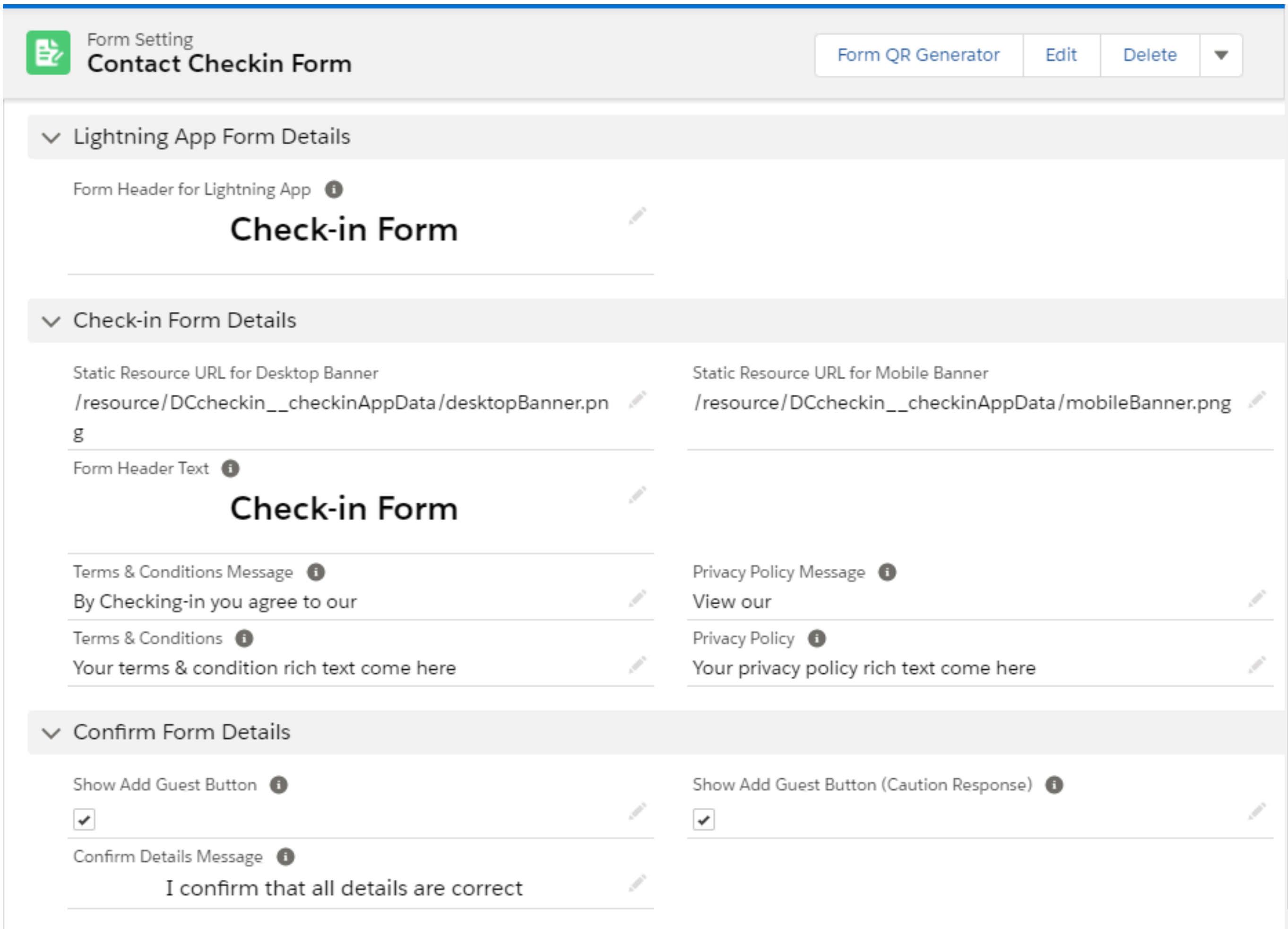
Personalisation of The App & Forms



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)

The Checkin Form



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

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

There are two formats that can be used: -

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

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

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

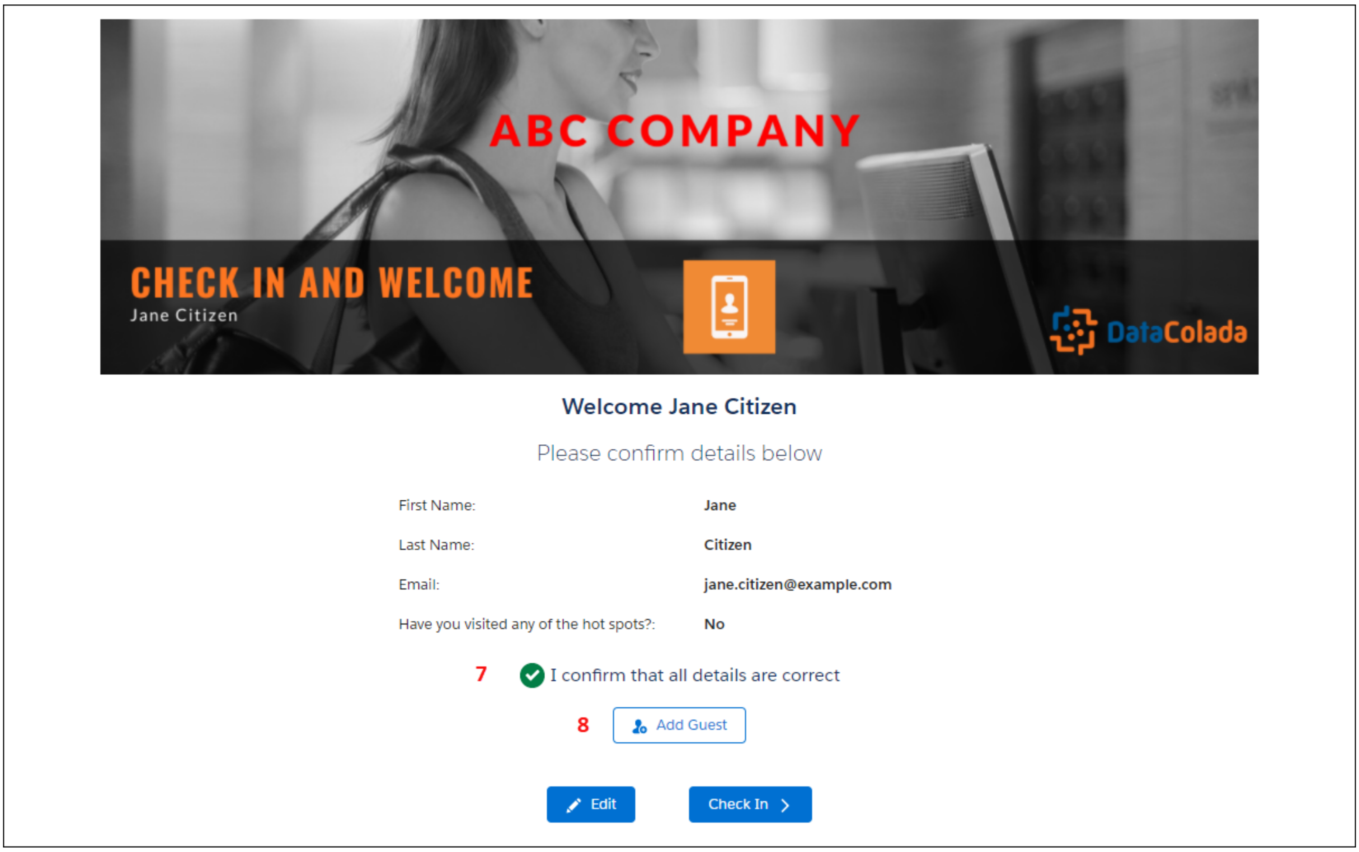
Terms & Conditions Message
This is the Terms & Conditions Message appearing on the Check-in Form Site page next to the Hyperlink, which can be entered in Rich Text Format.

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

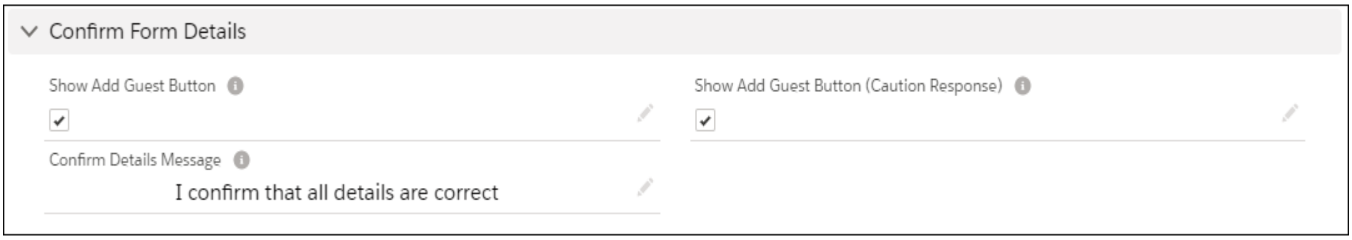
Privacy Policy Message
This is the Privacy Policy Message appearing on the Check-in Form Site page. Your Terms & Conditions can be entered in Rich Text Formatted next to the Hyperlink, which can be entered in Rich Text Format.

Privacy Policy
Your Privacy Policy can be entered in Rich Text Format.

The Confirm Details Message can be updated (Form Settings)



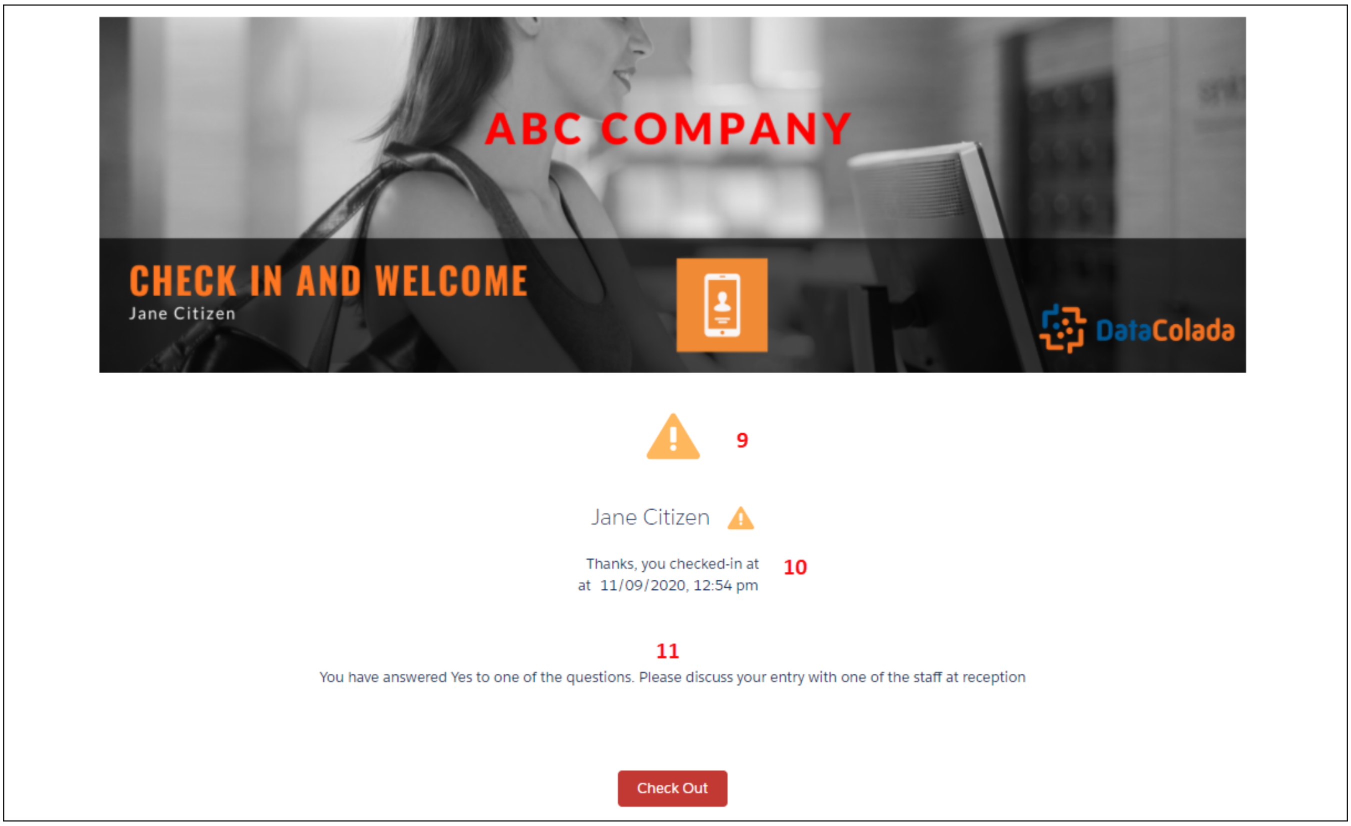
7. Ability to Add Guests can be controlled by the **Show Add Guest Button** (Form Settings)
8. Show **Add Guest Button,** This Checkbox will display the Add Guest Button on the Confirm Details page.



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.

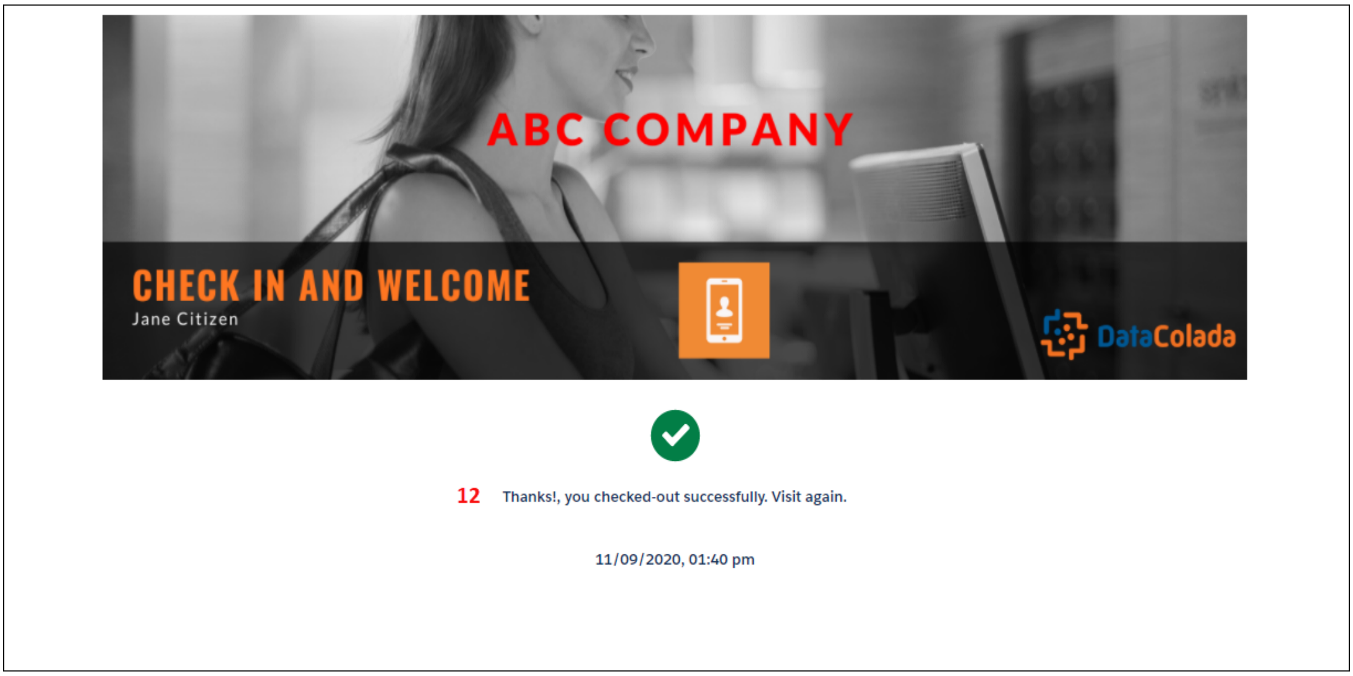


9. Disable the **Caution Response & Message** by unchecking Show **Caution Response.**
   The **Caution Response Message** can be updated (Form Settings)
10. The **Thank you Message** on Check-in can be updated (Form Settings)
11. The **Caution Response Message** on Check-in can be updated (Form Settings)

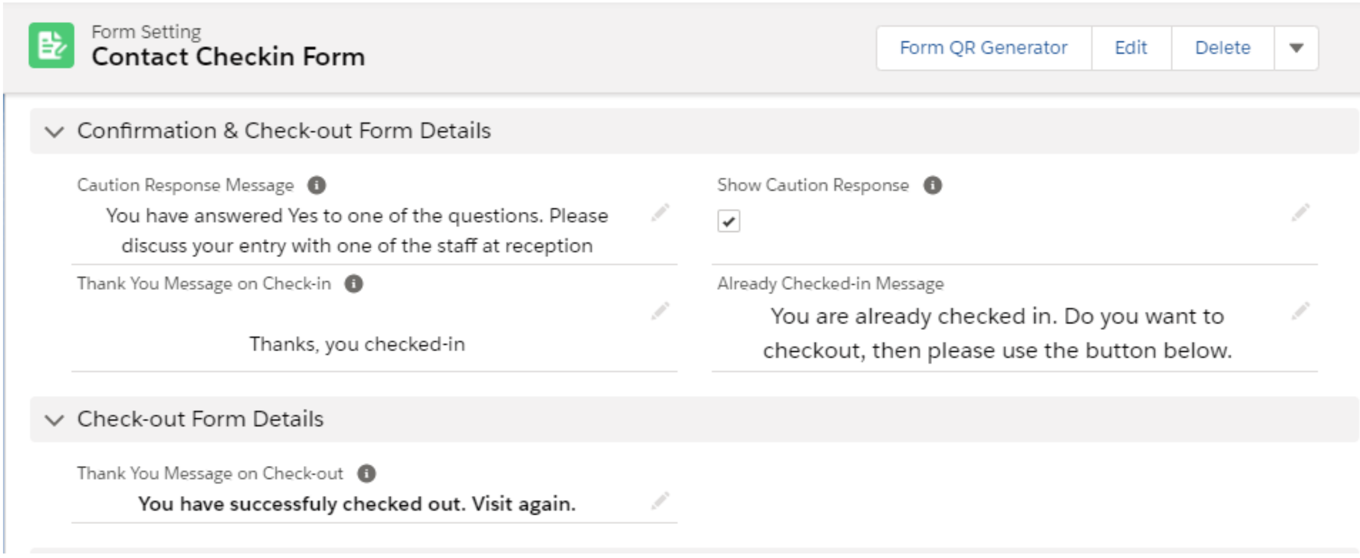
Caution Response Message
The Caution Response Message will be displayed on the Check-in form if Enabled when a Caution Response Answer is selected and can be entered in Rich Text Format.

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



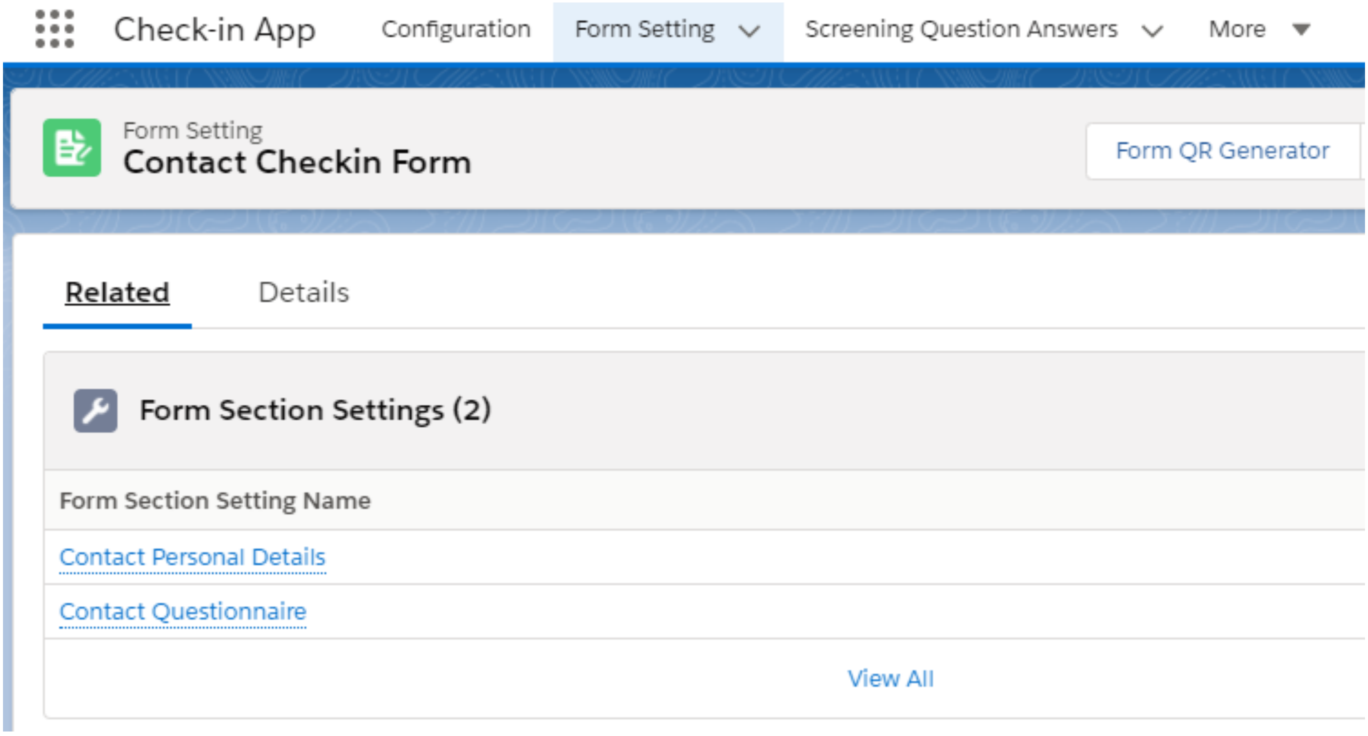
Thank You Message on Check-out
The Thank You Message displayed on the Check-out page. The message can be entered in Rich Text Format.

Form Section Setting

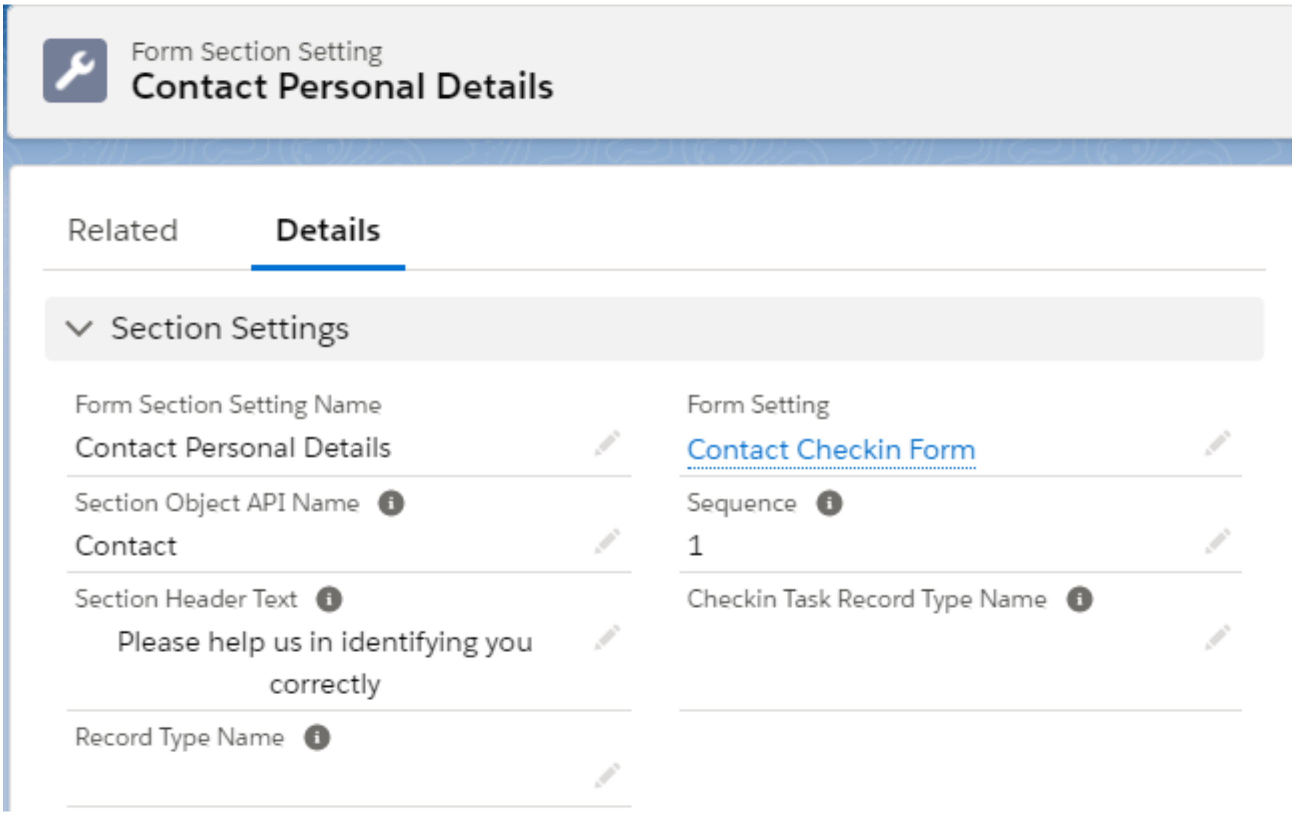
This object record contains the information which we want to show on the form header above personal information fields & section header description above questionnaire sections as explained below in the table below.

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.



2. Select the **Contact Personal Details**



Form Section Setting Name
The Form selected.

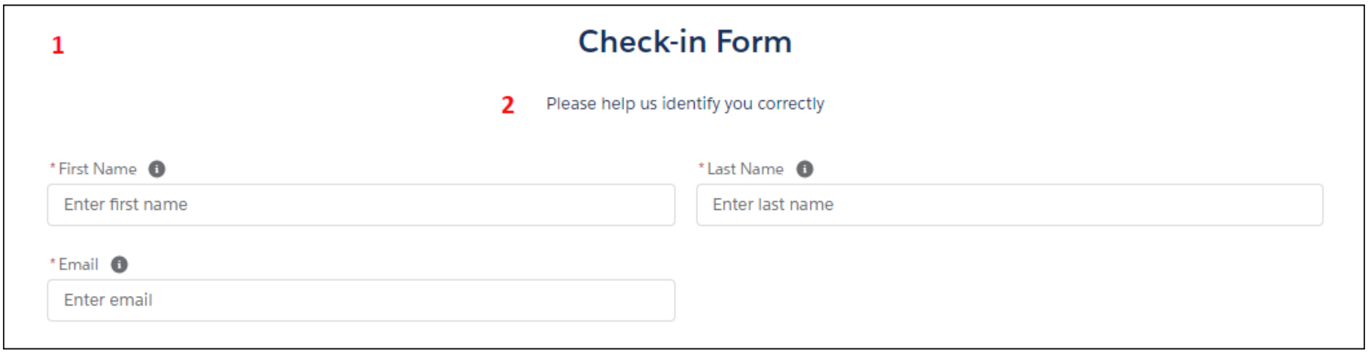
Form Setting
The link to the Form settings detail page

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.

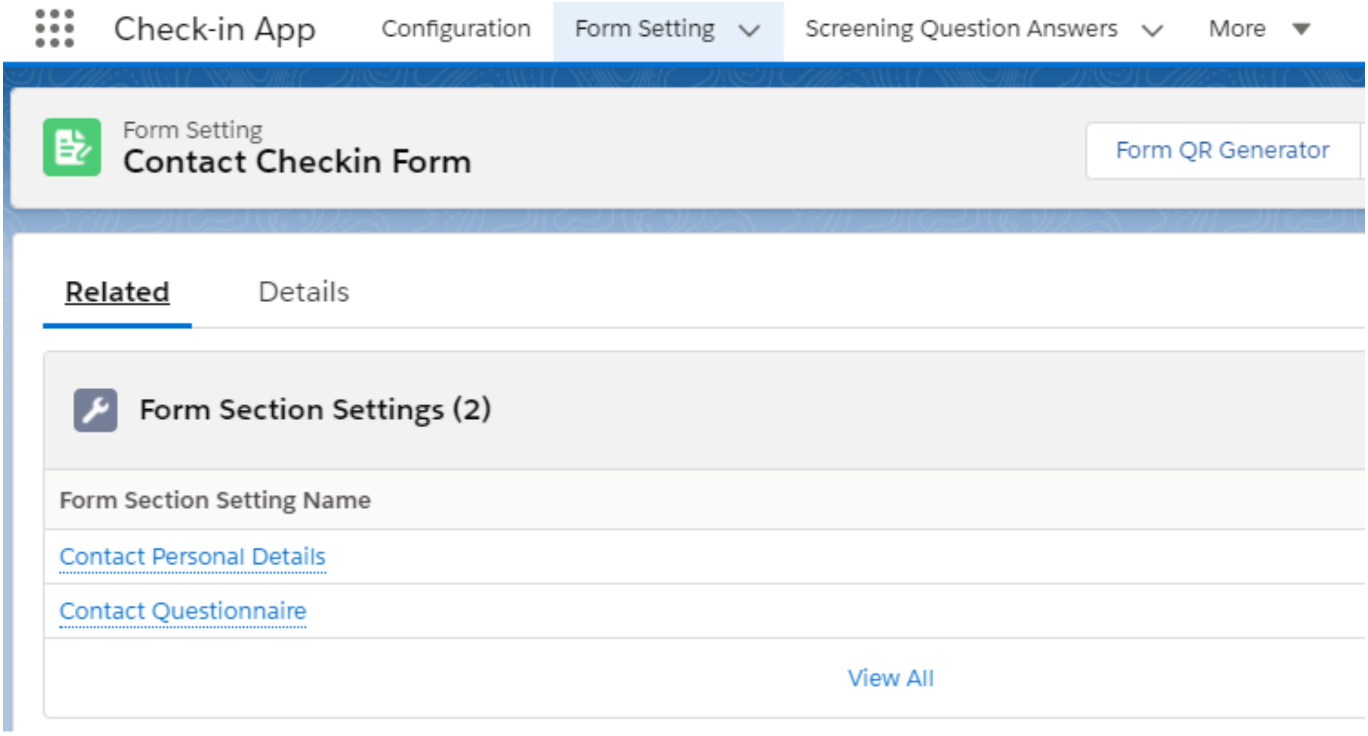
Record Matching Criteria
The Record Matching Criteria determines which fields on a new record matches the same field on an existing record.
If a match is found the record will be updated or a new record will be created if there isn't a match.
Check-in Site URL This is the Site URL for the Check-in Site 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).

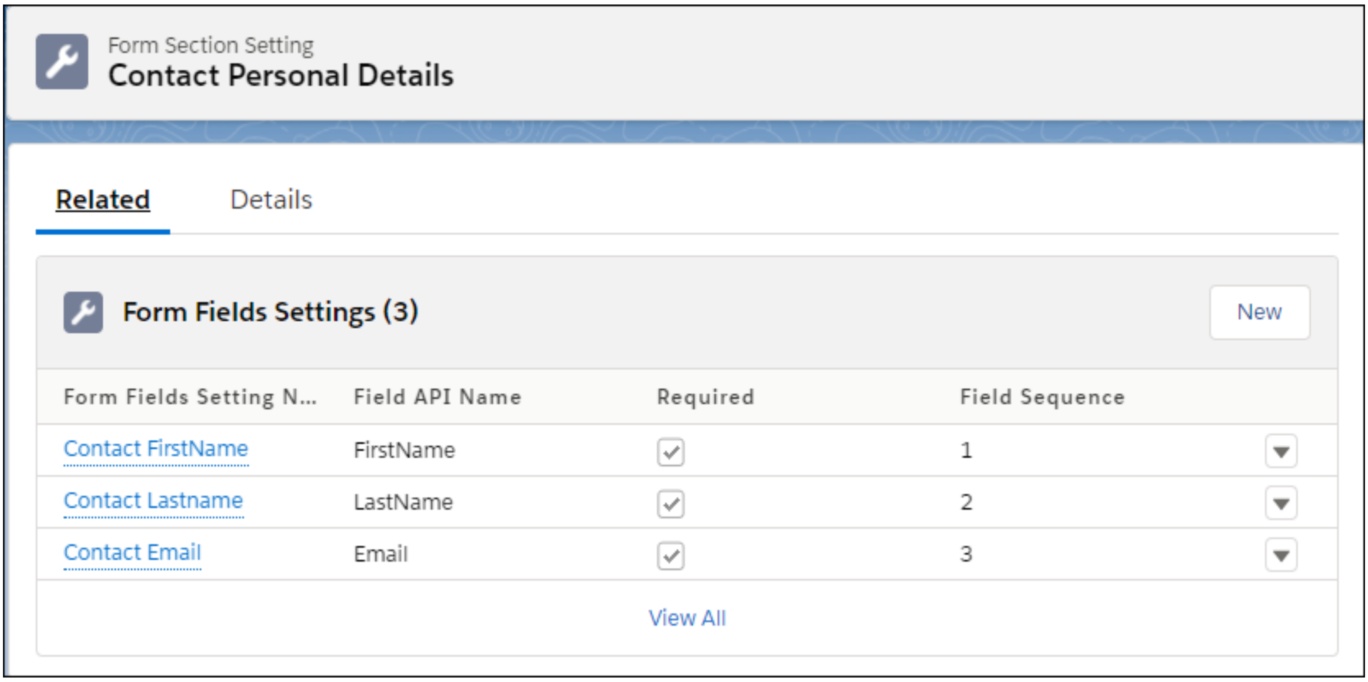
- This option should not be selected if using "Household Account Model" or "Bucket Account"
  Bucket Account Contacts are automatically assigned to the "Bucket Account" selected.
- This option should not be selected if using "Household Account Model" or "Create Account Name as Contact Name" has been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

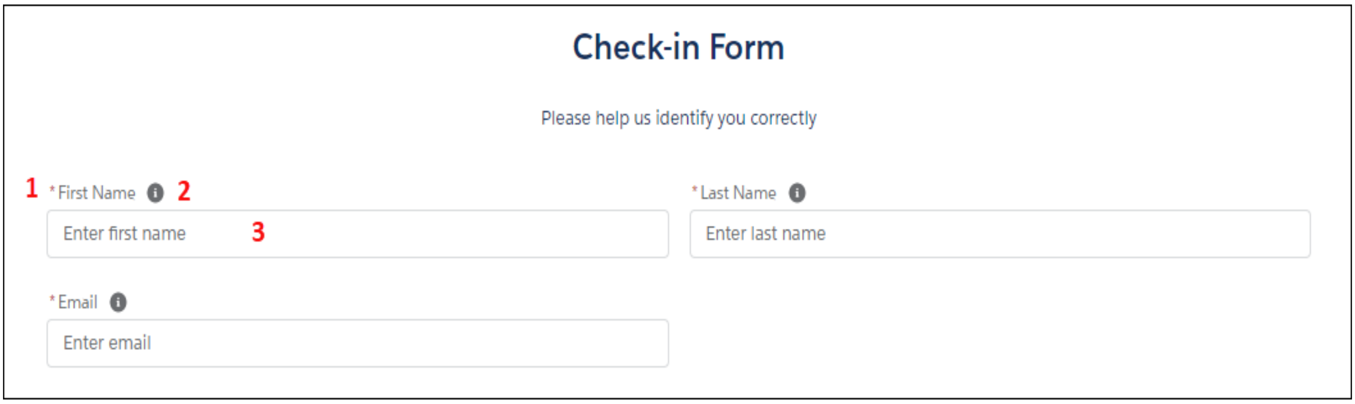
Form Fields Setting
This object record contains the information which we want to show on the form header above personal information fields & section header description above questionnaire sections as explained below in the table below.

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



2. Select the **Contact Personal Details**





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

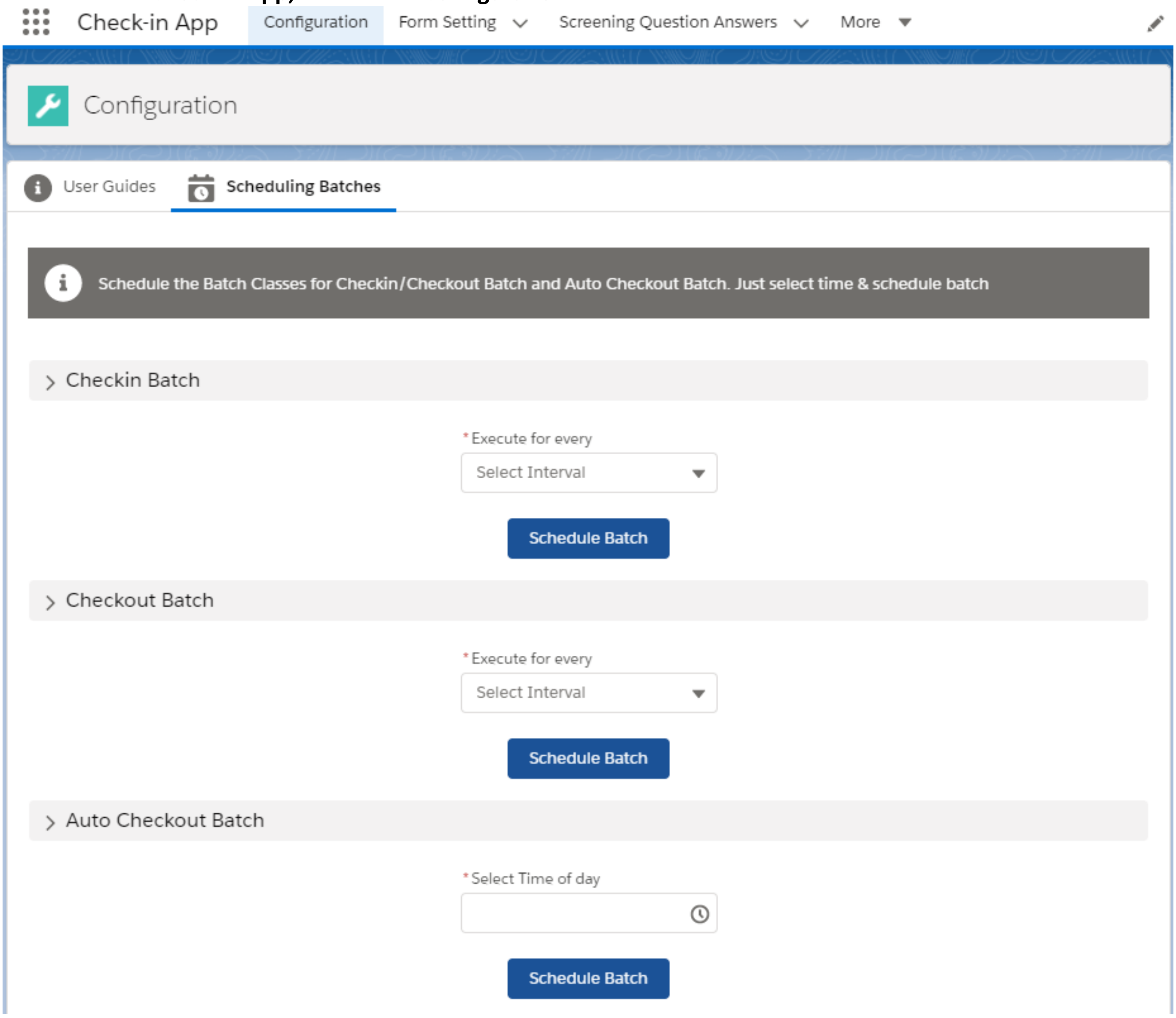
Show Hotspot List
When selected the Hyperlink for the Hotspot Area a Modal Popup will display next to this Question.

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

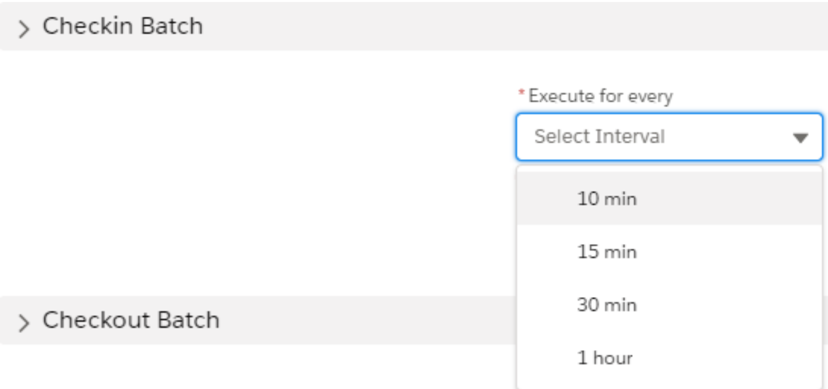
The Configuration Scheduler

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

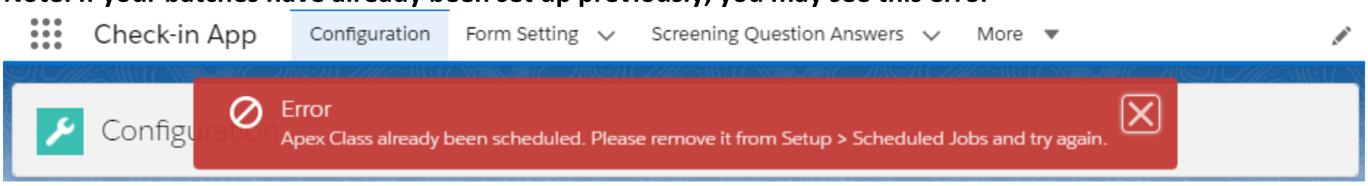


2. For the Checkin Batch, under ***Execute for every,** click on the **Select Interval** drop down and select the time intervals between batch process



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 Transactio... | * More

Checkin/Checkout Transactions
All

New | Import | Change Owner | Printable View

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

Search this list...

	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**

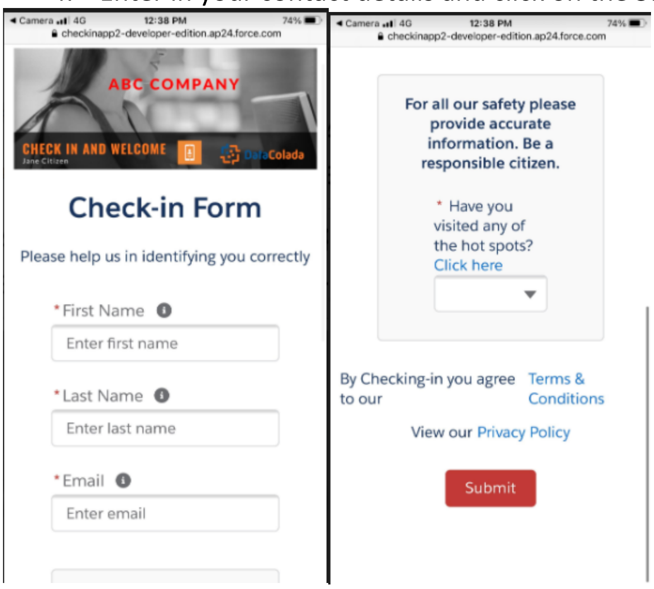
	Checkin C...	Visitor Ty...	Record T...	Checkin Date/Time	Checkout Date/Time	Status
1	CHK-000000	Employee	Checkin	28/4/2021, 3:11 PM		Processed
2	CHK-000001		Checkout		28/4/2021, 3:11 PM	Processed
3	CHK-000002	Employee	Checkin	30/4/2021, 10:19 AM		Processed
4	CHK-000003		Checkout		30/4/2021, 10:19 AM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

Testing the Check in App

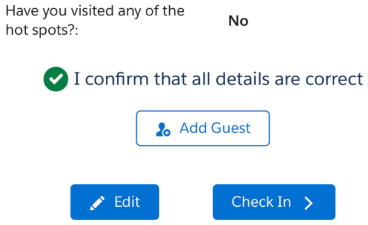
We can use the QR Code file stored above to launch our check in app.

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.

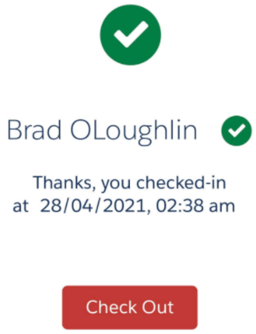
4. Enter in your contact details and click on the **Submit** Button



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

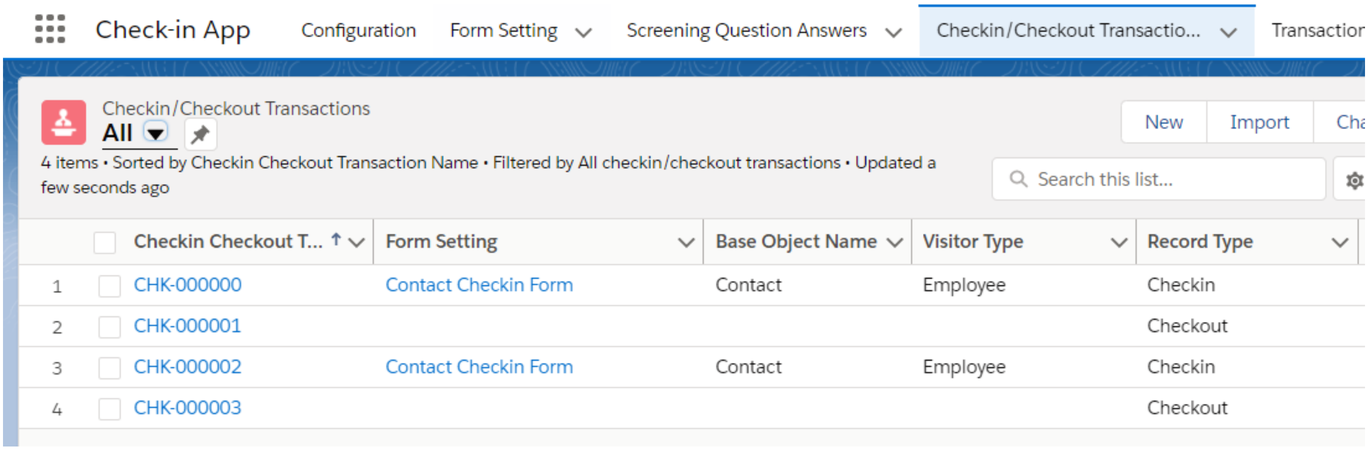


6. After Checking In, you will see the Confirmed Checkin Page with the **Check Out** button



Checkin/Checkout Transactions

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



	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