

ILT App - Setup Guide, Architecture, and Details

Setup Guide

This documentation contains instructions on how to install the ILT Components into your org to get you up and running!



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Whats Included?

Custom Components

Calendar - Admin

Images:

< Jun 2020 >						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
		11:00 - Sales B...				
21	22	23	24	25	26	27
28	29	30				

Sales Bootcamp - 16:45

▼ Details

Occurrence Number	EVENT-0026	
Start Date / Time	11/06/2020, 16:45	✓
End Date/Time	11/06/2020, 17:15	✓
Instructor	Daniel Tilley	✓
Training Event	Sales Bootcamp	✓
Event Full	☐	
ProWork	https://www.google.ie	✓
Attendance Confirmation Code	847VY0	✓
Meeting Link	https://www.google.ie	✓
Max Attendees	5	✓
Number of Sign Ups	0	
Number of Attendees	0	
Created By ID	Daniel Tilley	
Created Date	14/04/2020, 17:27	
Last Modified By ID	Daniel Tilley	

Cancel

Sales Bootcamp - 16:45

> Details

▼ Attendees

Name	Email Address	Sign Up Confirmed	Attendance Confirmed	Remove Attendee
Daniel Tilley	dtilley@salesforce.com	✗	✗	

Cancel

CMP Name: Training Event Calendar (Admin View)

Available In:

```
<target>lightning__AppPage</target>
<target>lightning__HomePage</target>
<target>lightning__RecordPage</target>
<target>lightningCommunity__Page</target>
<target>lightningCommunity__Default</target>
```

Description:

The Calendar CMP for admins allows the user to manage their events in an calendar view. The user is able to create and edit their own events (Training_Event_Occurrence__c) and also manage the attendees for a given event. They may also sign up for other events if needed too

Considerations:

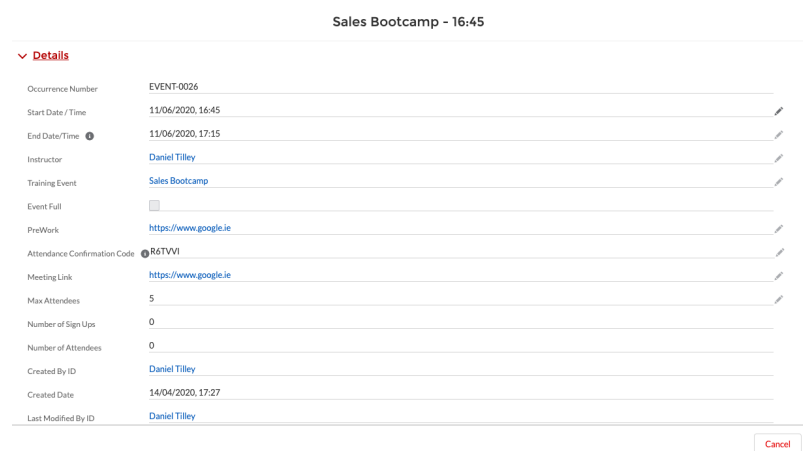
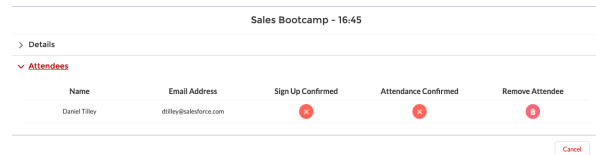
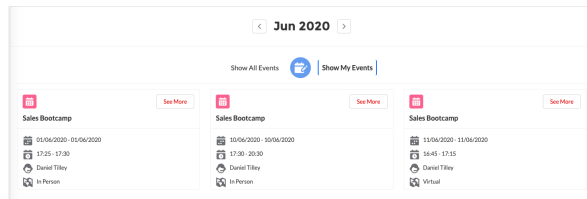
- Builder param can be used to determine whether or not admins / organisers see only their events or everyone's.
- Can be placed anywhere in the org / community and should work straight out of the box.
- Pulls data from the mainly from the Training_Event_Occurrence__c object.
- All record data page layouts are taken from the default page layout for a given user and can be changed from the object manager.

Calendar - Attendee

Images:

List View - Admin

Images:



CMP Name: Training Event List View (Admin View)

Available In:

```
<target>lightning__AppPage</target>
<target>lightning__HomePage</target>
<target>lightning__RecordPage</target>
<target>lightningCommunity__Page</target>
<target>lightningCommunity__Default</target>
```

Description:

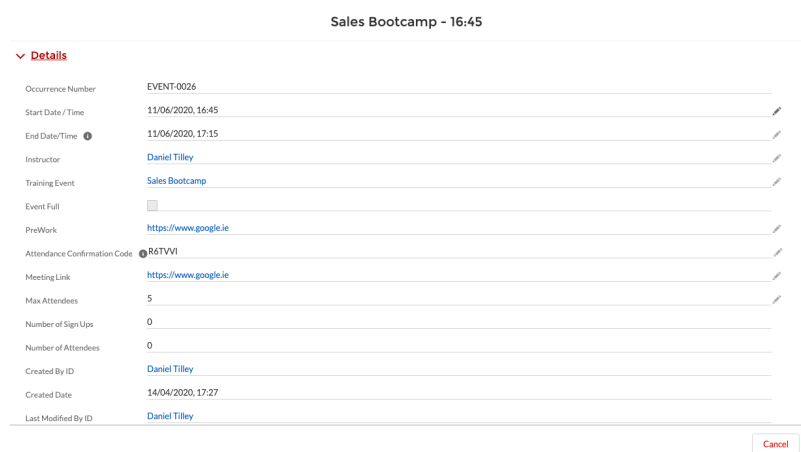
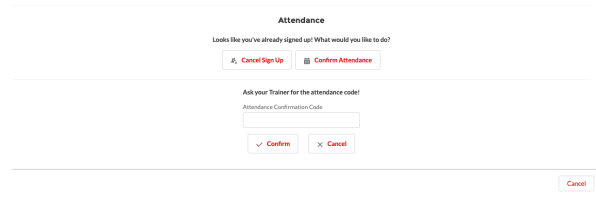
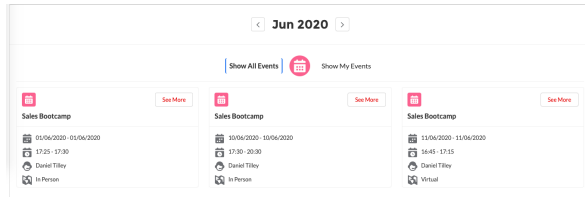
The List View CMP for admins allows the user to manage their events in a card list view. The user is able to create and edit their own events (Training_Event_Occurrence__c) and also manage the attendees for a given event. They may also sign up for other events if needed too

Considerations:

- Can be placed anywhere in the org / community and should work straight out of the box.
- Pulls data from the mainly from the Training_Event_Occurrence__c object.
- All record data page layouts are taken from the default page layout for a given user and can be changed from the object manager.

List View - Attendee

Images:



CMP Name: Training Event List View (Attendee View)

Available In:

```
<target>lightning__AppPage</target>
<target>lightning__HomePage</target>
<target>lightning__RecordPage</target>
<target>lightningCommunity__Page</target>
<target>lightningCommunity__Default</target>
```

Description:

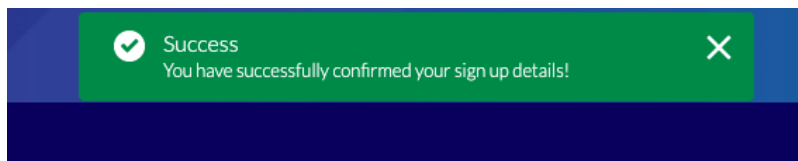
The List View CMP for attendees allows the user to browse events in a card list view. The user is able to view and sign up to events (Training_Event_Occurrence__c) and also manage their attendance for these events.

Considerations:

- Can be placed anywhere in the org / community and should work straight out of the box.
- Pulls data from the mainly from the Training_Event_Occurrence__c object.
- All record data page layouts are taken from the default page layout for a given user and can be changed from the object manager.

Sign Up Confirmation

Images:



Event Signup Confirmation

Thanks for confirming your signup! We hope you enjoy the event.



CMP Name: Training Event - Attendee Confirmation

Available In:

```
<target>lightning__AppPage</target>  
<target>lightning__HomePage</target>  
<target>lightning__RecordPage</target>  
<target>lightningCommunity__Page</target>  
<target>lightningCommunity__Default</target>
```

Description:

The Attendee Confirmation component is used to confirm that the attendee has provided a valid e-mail address that they have access to. The user will be directed back to the page where this item is placed and will confirm their attendance for them.

Considerations:

- Can be placed anywhere in the org / community
- If placed in the org, you will need to update the: **Training_Events_Internal_Confirmation_Page** label with the path to the page CMP. Out of the box, the user is directed to a lightning app by default.
- If placed in a community, you will need to update the: **Training_Events_Community** and **Training_Events_Community_Confirmation_Page** labels with the name of the community and the path to the page where the CMP is placed. This will not work out of the box.

Email Templates

There are 2 email templates included. One for in person confirmation and another for virtual confirmation. They can be found in the following location:

Navigate to setup → Classic Email Templates → Training Events Email Templates Folder

Folder

Training Events Email Templates

[Edit](#) | [Create New Folder](#)

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

New Template

Action	Email Template Name ↑	Template Type	Available For Use	Description	Author	Last Modified Date
Edit Del	Confirm Attendee Signup - In Person	Text	✓		mkohn	6/2/2020
Edit Del	Confirm Attendee Signup - Virtual	Text	✓		mkohn	6/2/2020

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

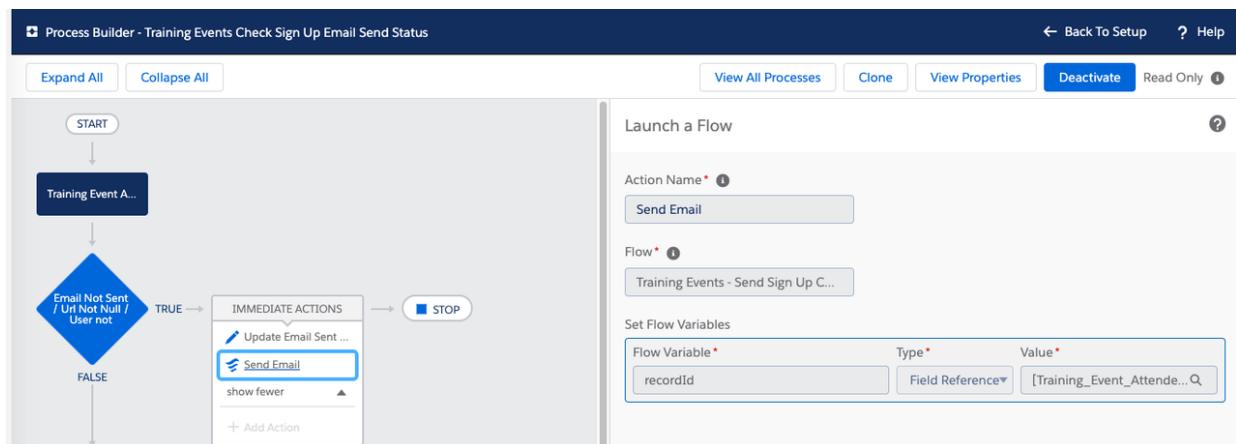
You can add / remove fields or text as needed in each email template.

Flows / Processes

Process - Attendee Sign Up Process

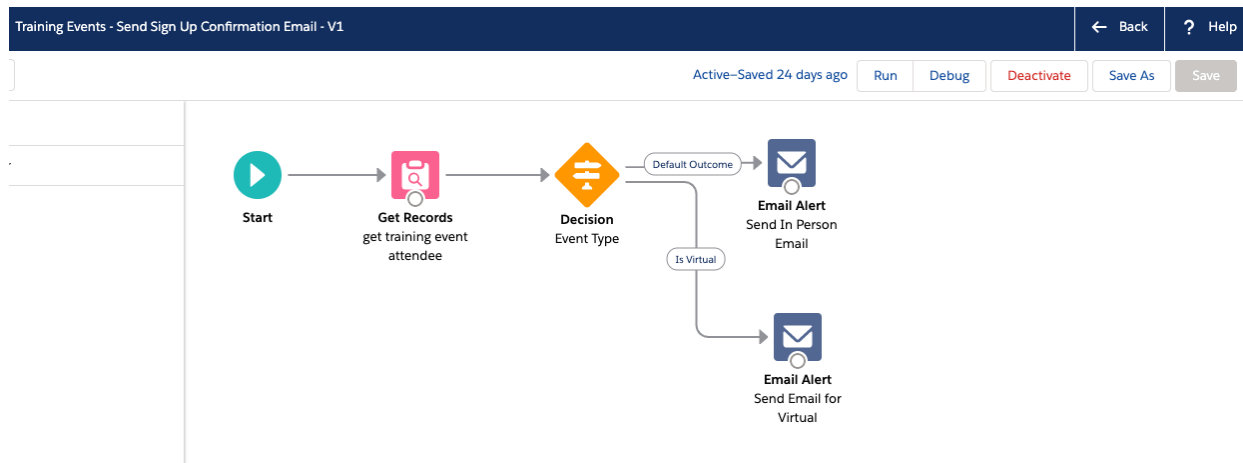
This process is fired when an attendee signs up to an event via the components. The process will set a checkbox to the record to avoid another e-mail sending and will then launch a flow to send the email.

This process is activated by default and if you wish to not use emails. Simply clone the process and remove the flow call and replace it with a record update to set the 'Sign_Up_Confirmed__c' field = checked. This will allow the attendee to skip the e-mail confirmation step.



Flow - Send Attendee Confirmation Signup Email

This flow is fired from the process builder and is used to determine what e-mail template to send to a user.



Installation Instructions

Before installing the package - **Communities Use Only**

There are few things to check before you install the Package into your org.

Ensure Communities are enabled in your Org

In Setup search for “Communities Settings”

Click on it and make sure “Enable Communities” is checked. You’ll be prompted to enter in a domain (Note: once you decide, you can’t change it later).

More Information: [How to enable Salesforce communities](#)

Ensure My Domain is setup, enable Communities



[Set up My Domain Video](#)
[How to enable community](#)

Can’t see Communities Settings in Setup?

This means communities is not enabled for your org. Please contact your account executive.

After installing the package

Perm Sets

1) Assign the right perm set to your profile, user etc

Three perm sets included:

- Training Event Attendee - Anyone attending events (Internal users)
- Training Event Attendee - Community User - Anyone attending events (Portal users)
- Training Events Admin - Anyone organising events
- Training Events Super User - Anyone who needs access to absolutely everything

Sharing Settings

2) Ensure sharing settings for 'Training Events' is set to 'public - read only' for external users. This is to ensure community portal users can see all training events and training event occurrences.

- Navigate to setup → Sharing Settings
- Click 'Edit' beside 'Organisation-Wide Defaults'
- Ensure your settings match for the 'Training Event' Object and save your changes

Training Event	Public Read/Write ▼	Public Read Only ▼	☒
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Labels

3) Ensure all the labels are updated and contain the correct information

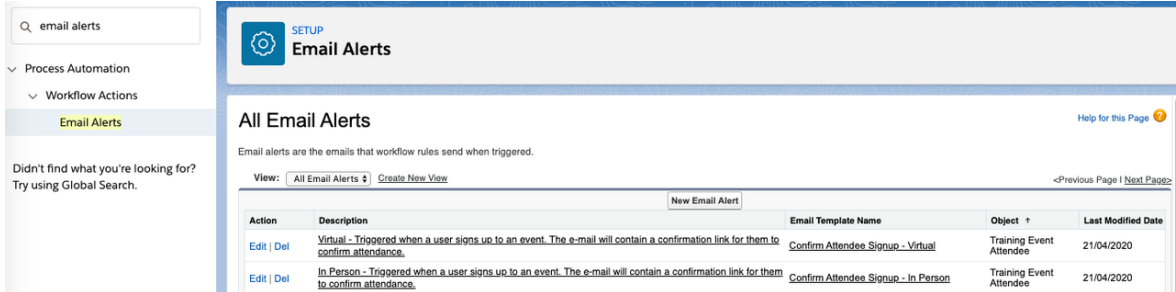
Three Labels included:

- **Training_Events_Internal_Confirmation_Page** - Url for the lightning page with the signup conformation page (works out of the box)
- **Training_Events_Community_Confirmation_Page** - The community page where the user is placing the sign up confirmation cmp (**MUST BE CHANGED**)
- **Training_Events_Community** - The name of the community where the user is placing the cmps - create a new community page or use an existing page as the sign up confirmation (**MUST BE CHANGED**)

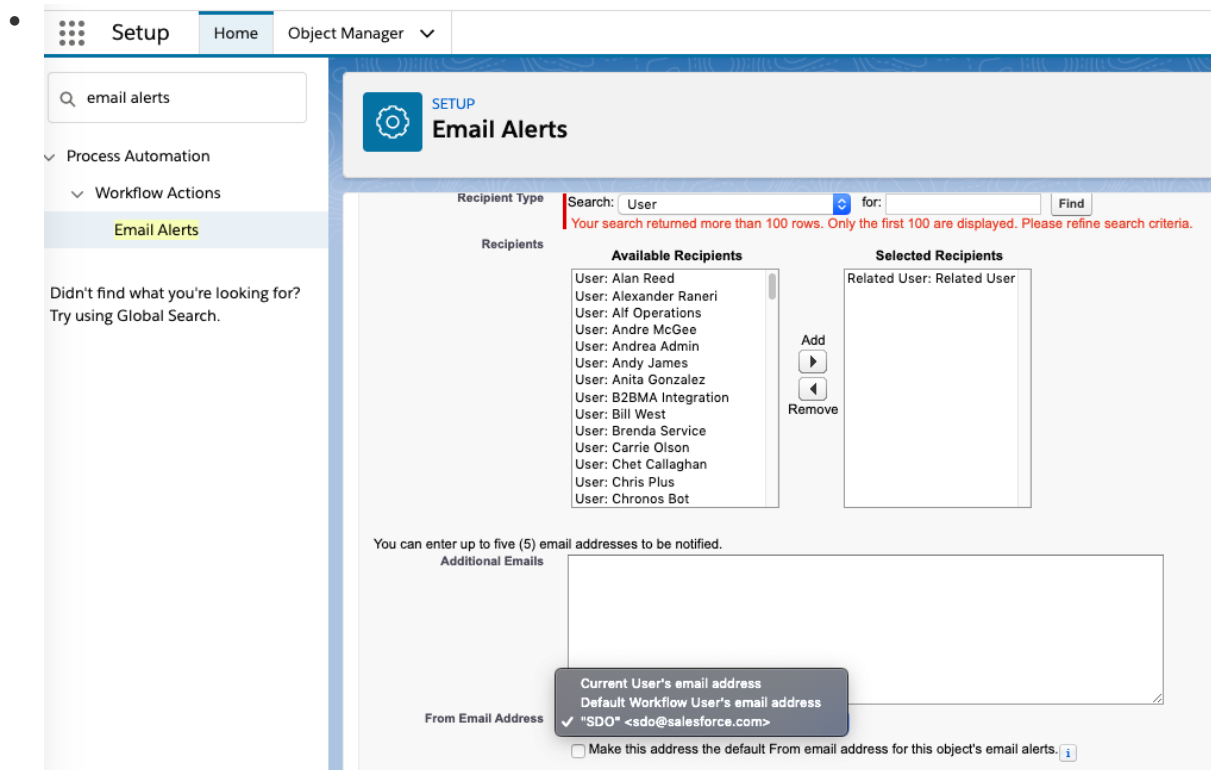
Email Sender Profile

4) Ensure [org wide addresses](#) are setup are ready to be used.

- Navigate to setup → Email Alerts → (Select either virtual / in person alert)

- 

- Scroll to bottom of the page and change the sender to your organisation wide sender address



FAQ's

How Do I change what fields appear in my components?

The calendar and list view components all use the [lightning record form](#) component. As a result, the fields displayed in the modal are based off the page layout assigned to a user's profile. You can create and change the standard page layout and they will be dynamically reflected in the components.

How do I show week long events?

Currently there is no way out of the box to show week long events. We are working on implementing this for version two of the ILT package.