

Product Documentation:

# Salesforce Managed Package & Field Definitions



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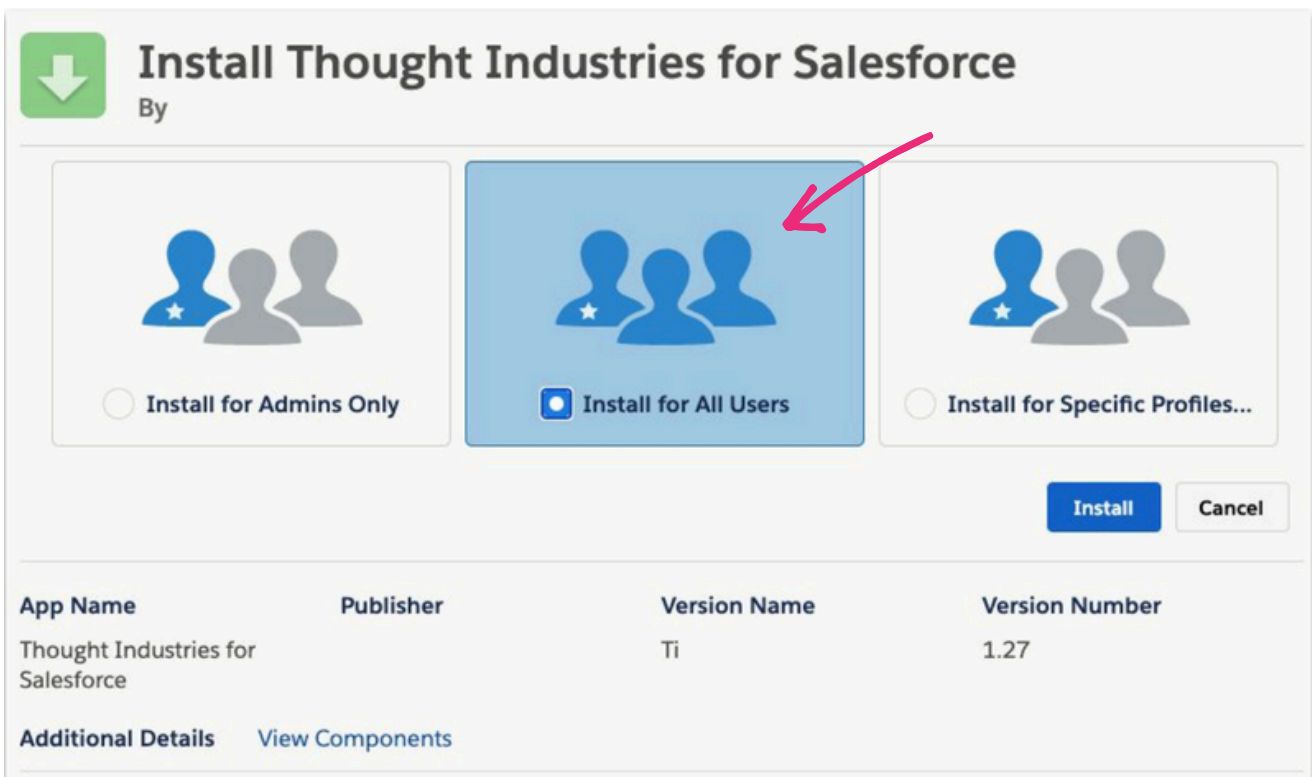
## INSTALLATION INSTRUCTIONS: ADDING THE MANAGED PACKAGE – STEP 1

**Note:** To begin the installation, place the version link in the URL Bar of your browser. The URL link you need can only be acquired from a member of Thought Industries. Please reach out to your Account Team to obtain the link.

There are two links, 1 for sandbox testing and one for live production, the Account Team can provide the appropriate link when necessary.

After loading the page, you will see three options:

- Install for Admins Only
- Install for All Users
- Install for Specific Profile



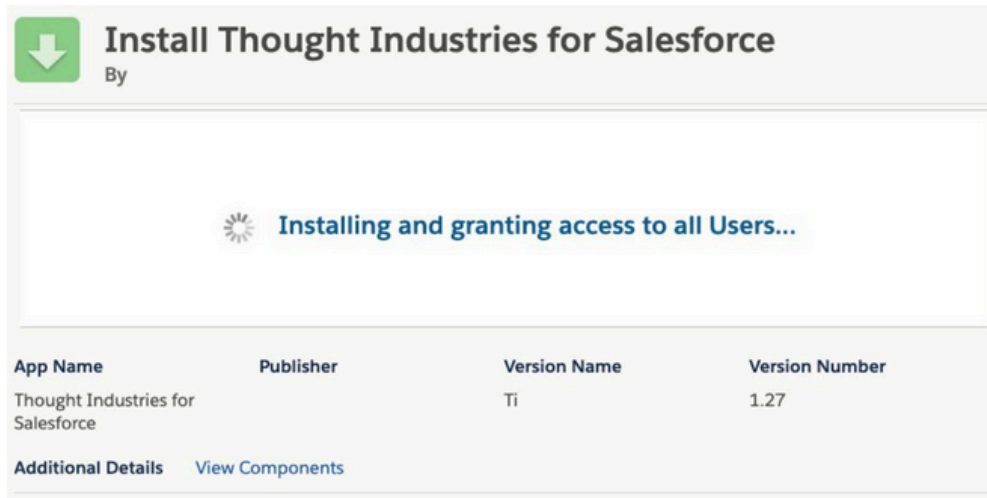
App Name	Publisher	Version Name	Version Number
Thought Industries for Salesforce	Ti	Ti	1.27

[Additional Details](#) [View Components](#)

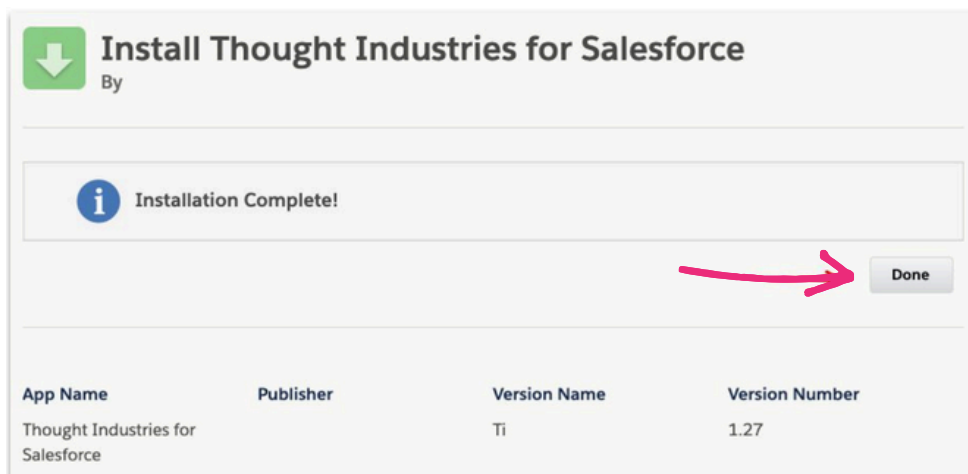
Because this package is governed at the instance level and individual access to the package is provided through permission sets, select the **Install for All Users** option, and then click **Install**.

## ADDING THE MANAGED PACKAGE – STEP 2

The package will then be installed based on your selection during Step 1.



The system will let you know once the package has been installed. From there, simply click **Done**.



After the package is installed, you will be directed to a Salesforce Setup page for Installed Packages. To confirm the package is installed, look for **Thought Industries for Salesforce** on the page.

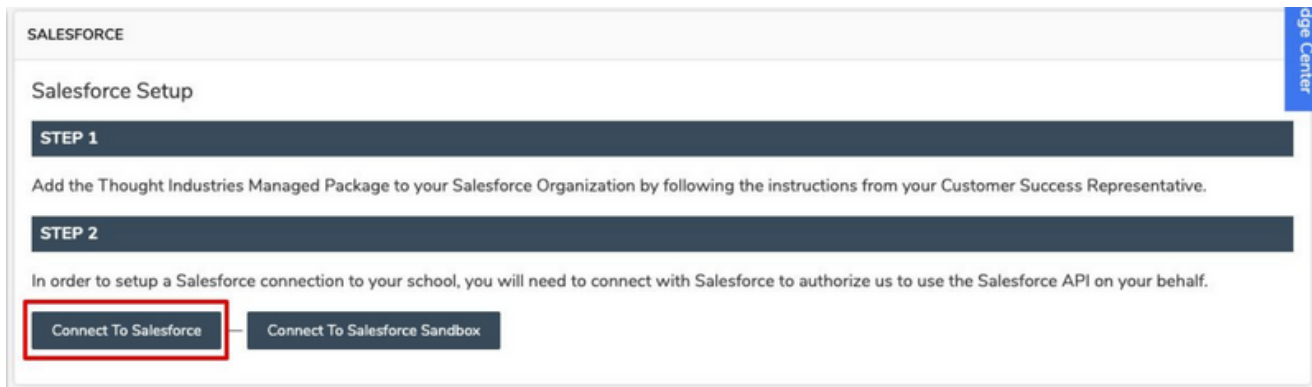
**Note:** The Managed Package creates **two** permission sets: the TI Admin User and the TI Standard User. The TI Admin User has access to the following tabs: TI Admin Panel, TI Content, & TI Portal, while the TI Standard User *only* has access to the TI Content tab.

## CONNECTING TO SALESFORCE

Once the package is successfully installed, users can connect to Salesforce in Thought Industries.

### To connect to Salesforce:

1. Log into Thought Industries as an admin user.
2. Navigate to **Settings > Connections > Third-Party**.
3. Scroll down to the Salesforce container and in Step 2, click **Connect to Salesforce**, as shown below.

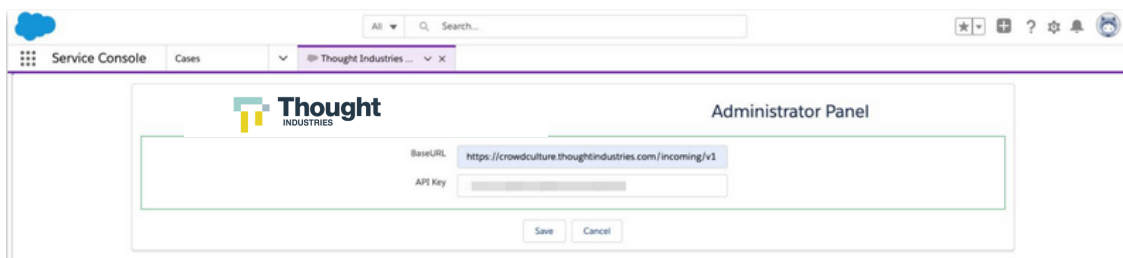


## SYNCING Thought Industries & SALESFORCE

Before syncing Thought Industries & Salesforce, the TI Admin Panel will need to be populated in Salesforce, and your base URL with the API Key will need to be entered.

### To populate the TI Admin Panel in Salesforce:

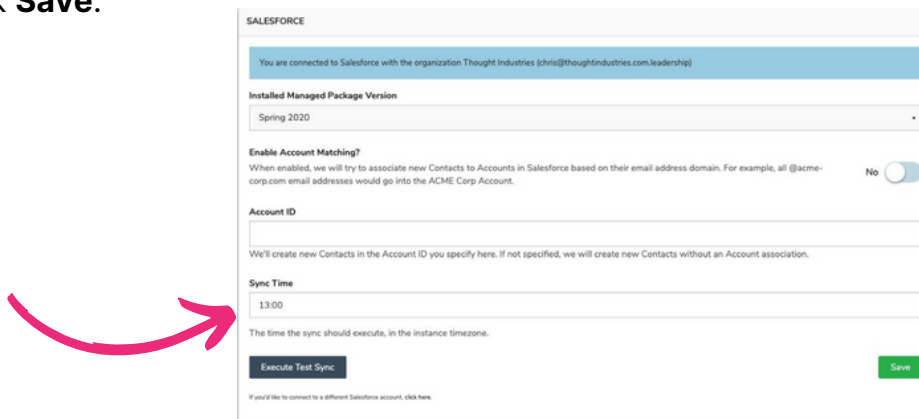
1. From the Salesforce home page, select the **App Launcher**.
2. Search for "TI Admin Panel" in the search field, then select it from the results.
3. Input your BaseURL.
  - This is your site's URL with "/incoming/v1" added to the end.
  - e.g. https://home.thoughtindustries.com/incoming/v1
4. Input your API Key.
  - **Thought Industries Platform > Settings > Security**



After the TI Admin Panel is configured in Salesforce, a sync time can be set in the TI Platform.

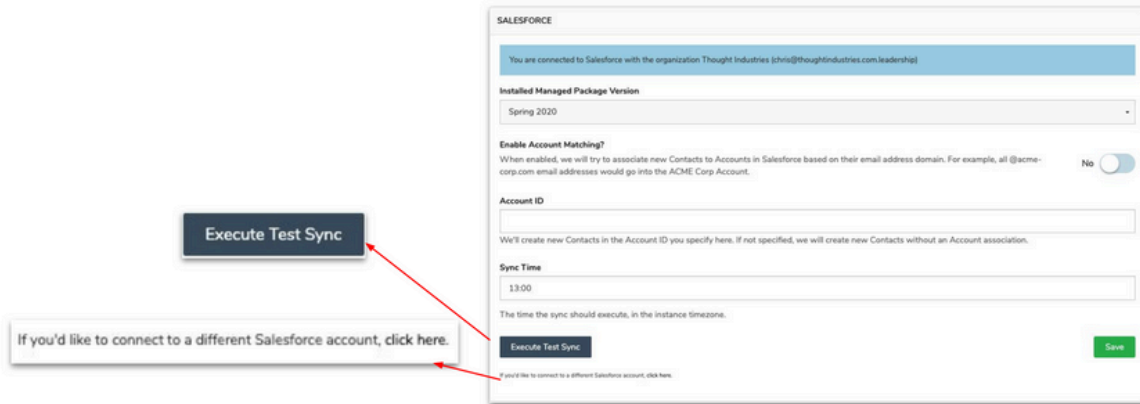
### To set a sync time in Thought Industries:

1. In the Thought Industries Platform, navigate to **Settings > Connections > Third-Party**.
2. In the **Salesforce** Section, enter a time in the **Sync Time Field**.
3. Click **Save**.



## Syncing Thought Industries & Salesforce– Continued

If immediate syncing is required, click the **Execute Test Sync** button found below the **Sync Time Field**. Also, if a different Salesforce account needs to be connected, click the **Click Here** link below the **Execute Test Sync** button.

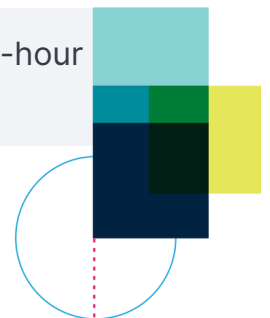


At the sync time specified in the Thought Industries management interface, Thought Industries will execute a series of “Bulk Upsert” API Commands utilizing SFDC’s Bulk APIs. These APIs are designed to quickly load large amounts of data into a particular SFDC organization.

Using the upsert operation, we can either insert or update an existing record in one call. To determine whether a record already exists, the upsert statement uses the record’s ID as the key to match: records, a custom external ID field, or a standard field. If the key is not matched, then a new object record is created. If the key is matched, then the existing object record is updated.

Salesforce queues a new job for processing once we’ve created the job and uploaded data for it. Salesforce then moves the job to the **UploadComplete** state. Once the job is de-queued, Salesforce starts processing the job operation and moves the job to the **InProgress** state. After the job is fully processed, Salesforce moves the job to the **JobComplete** state.

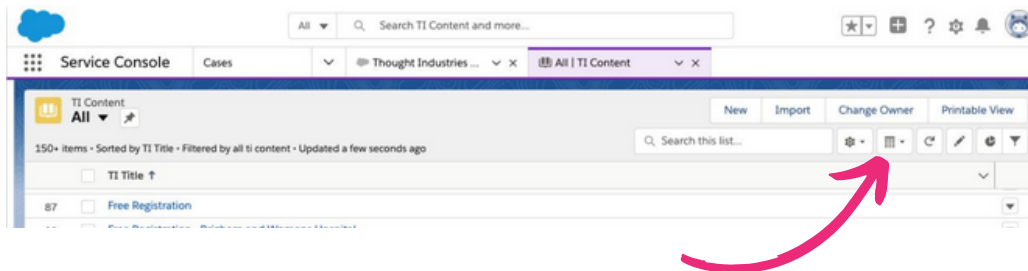
**Note:** The SFDC-imposed record limit is 100 million records per 24-hour period.



## Viewing Content in Salesforce

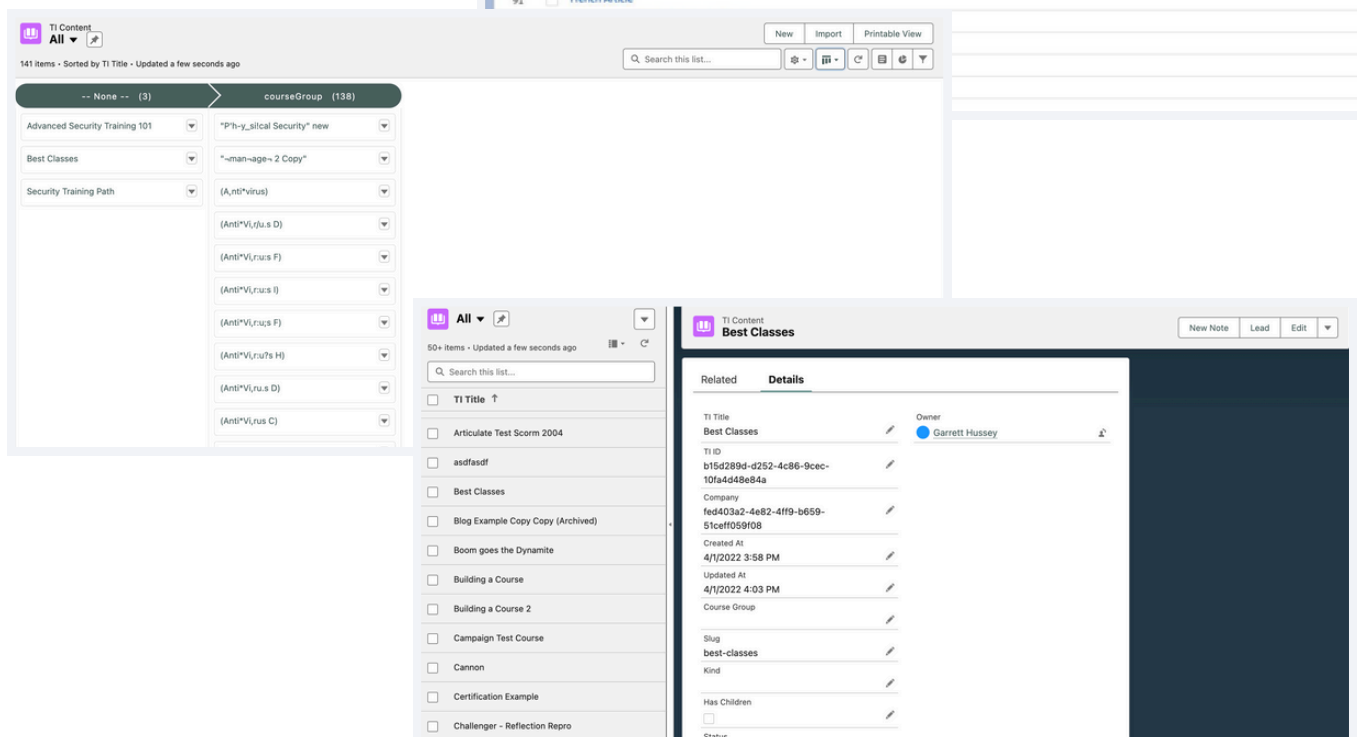
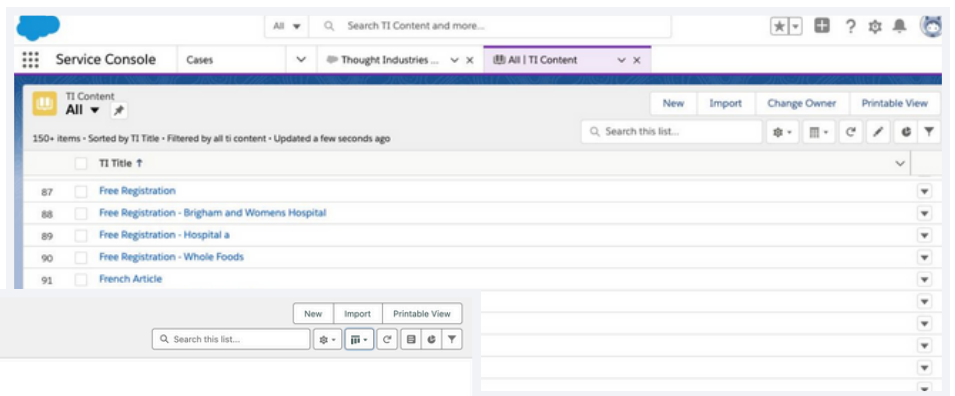
1. To view Content, from the Salesforce home page, select the App Launcher.
2. Search for "TI Content" in the search field, then select it from the results.

The Content can be viewed in 3 different styles using the "select list display".



The options consist of the following:

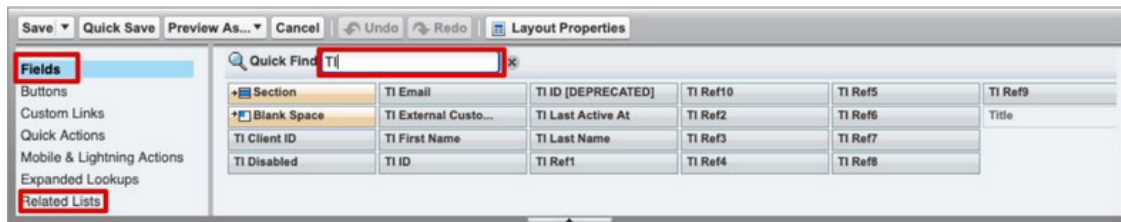
1. Table View
2. Kanban View
3. Split View



## OPTIONAL FEATURES: SETTING UP A CONTACT LAYOUT

To add TI Fields and Related Lists to the contact layout, navigate to **Setup > Object Manager > Contact > Page Layouts**.

Search “TI” in both **Fields** and **Related Lists** sections.



While this step is optional, we do recommend adding all TI Fields and Related Lists to the contact layout.

These will include:

### **TI Fields**

- TI Client ID
- TI Disabled
- TI Email
- TI External Customer ID
- TI First Name
- TI ID
- TI Last Active At
- TI Last Name
- TI Ref1-10

### **TI Related List**

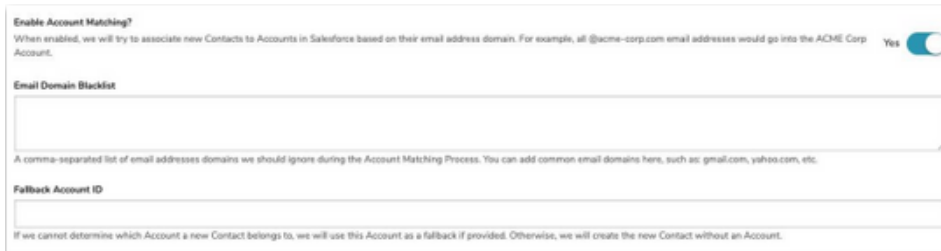
- TI Assessment Attempts
- TI Assignment Submissions
- TI Certificates
- TI Content Actions
- TI Learning Path
- TI Purchased Courses
- TI Purchases

## ACCOUNT MATCHING

Path: **Settings > Connections > Third-Party > Salesforce**

By default, account matching is disabled in Thought Industries. Once a learner is created, we will create Salesforce Contacts either in the Account specified in the Account ID field, or, if left blank, without an Account associated.

To enable Account matching, simply toggle the option to **Yes**.



Enable Account Matching?  
When enabled, we will try to associate new Contacts to Accounts in Salesforce based on their email address domain. For example, all @acme-corp.com email addresses would go into the ACME Corp Account. **Yes**

Email Domain Blacklist

A comma-separated list of email addresses domains we should ignore during the Account Matching Process. You can add common email domains here, such as: gmail.com, yahoo.com, etc.

Fallback Account ID

If we cannot determine which Account a new Contact belongs to, we will use this Account as a fallback if provided. Otherwise, we will create the new Contact without an Account.

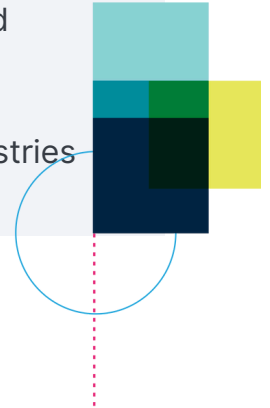
Once enabled, Thought Industries will attempt to find a Contact by email address in Salesforce. If there is more than one Contact found, Thought Industries will use the first Contact found. If there are no Contacts found, Thought Industries will create the Contact into an Account based on their email address. In order to find the correct Account, we search Salesforce Contacts for the domain portion of the email address (e.g. **@thoughtindustries.com** in the address of support@thoughtindustries.com.) We then group these results by Account and pick the Account with the most matches. For example, if Acme Corp has two **@thoughtindustries.com** email addresses, and Marvin Corp has just one **@thoughtindustries.com** email address, we will create the Contact in the Acme Corp Account. In addition to this, you can also pre-match by providing a **sfContactId** as part of your SSO or via Thought Industries' [create/update user API](#). If Thought Industries' system is provided a **sfContactId**, it skips the matching process.

If no matches are found by email domain, we have the option of creating the Contact in a fallback Account specified by the client. If no fallback Account is specified, we will create a Contact without an Account association.

The option to blacklist email domains will be present if account matching is enabled. The domains provided will be ignored during the account matching process. Blacklisting domains is primarily used for common domains like gmail.com, Yahoo, etc.

## ACCOUNT MATCHING

**Note:** You can also use Thought Industries' bulk import process to upload new learners to Thought Industries and connect them to their existing contacts- specified by you at the the time of the import. This option can currently only be done with learners that are not yet in the Thought Industries system.



### IMPORT LEARNERS

To begin the bulk import process, please download the following CSV template.

[Download CSV Template](#)

After you have downloaded the template, fill in the information for the learners you want to import, and then export as a CSV. Once you have done that, click the button below.

[I've downloaded and filled in the template](#)

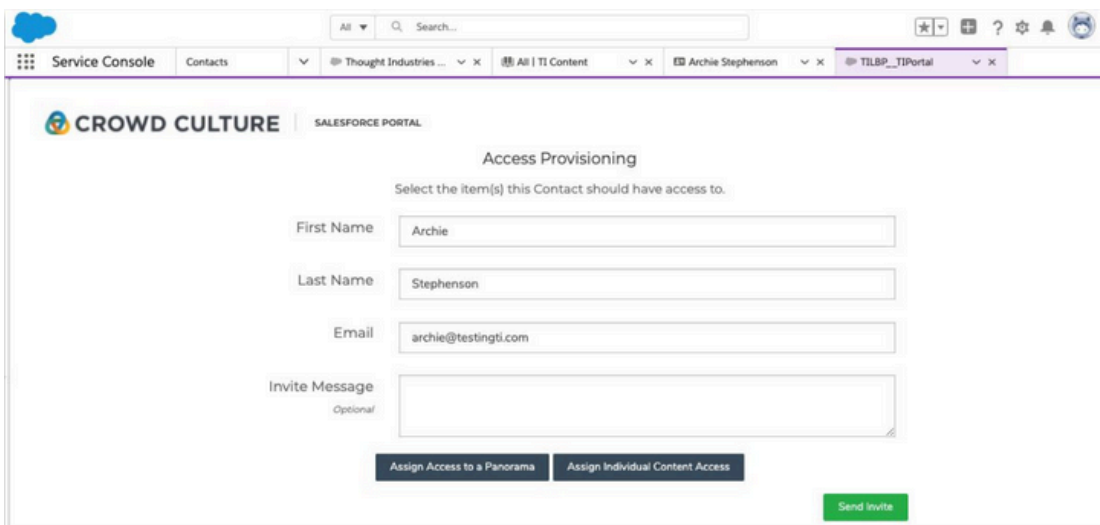
## TI PORTAL

Managers can invite Salesforce Contacts to their Thought Industries school through the TI Portal Tab. Existing Contacts can also have additional content access provisioned to them through the TI Portal.

Before accessing the TI Portal in Salesforce, make sure Frame Options in Thought Industries is set to **Allow** by going to **Thought Industries > Settings > Security > Security Options**.

### Assigning Access Instructions:

1. Navigate to the TI Portal tab.
2. Enter the contact's first name, last name, or email address in the Contact Search field.
3. Click **Find Contact**.
4. Select the Contact from the populated list.
5. Ensure the populated first name, last name, and email address are correct.
6. Enter an Invite Message (optional).
7. Click **Assign Individual Content Access** or **Assign Access to a Panorama**.
8. Enter the content name or client name and click **Search**.
9. Select the content or client from the populated list.
  - a. If assigning individual content and more content needs to be added, repeat steps 8 and 9.
10. Click **Send Invite**.



The screenshot shows the Salesforce interface for the TI Portal. The browser tabs include 'Service Console', 'Contacts', 'Thought Industries', 'All TI Content', 'Archie Stephenson', and 'TI Portal'. The main content area is titled 'CROWD CULTURE | SALESFORCE PORTAL' and 'Access Provisioning'. Below this, it says 'Select the item(s) this Contact should have access to.' The form contains the following fields:

- First Name: Archie
- Last Name: Stephenson
- Email: archie@testingt1.com
- Invite Message: (Optional)

At the bottom of the form, there are two buttons: 'Assign Access to a Panorama' and 'Assign Individual Content Access'. A green 'Send invite' button is located at the bottom right of the form area.

## FIELD DEFINITIONS

- Through a Managed Package, engagement data created by learners will be sent to Salesforce and stored in relevant TI Fields and Related Lists.
- All TI fields and data accessed through Managed Package can be utilized in SFDC custom reporting functionality.
- Within this section, you will find a Field Name, API Name, Type and Definition of all fields in the Thought Industries Salesforce Managed Package.
- Keep in mind, data is synced every 24 hours. So, exact parity of information across Salesforce and Thought Industries at all times is not expected.

**TABLE: CONTACT**

Field Label	API Name	Type	Definition
Account ID	AccountId	Lookup (Account )	Salesforce Account ID Associated with Contact
Contact ID	Id	Id (18)	Salesforce Contact ID
Email	Email	Email (80)	Existing Contact Field. If TI creates the contact, this field will match TI Email
First Name	FirstName	Text (40)	Existing Contact Field. If TI creates the contact, this field will use TI First Name and keep static
Last Name	LastName	Text (80)	Existing Contact Field. If TI creates the contact, this field will use TI Last Name and keep static
TI Client ID	TILBP__TI_Client_ID__c	Text (50)	ID number of the Client the Learner belongs to (Panorama only)
TI Disabled	TILBP__TI_Disabled__c	Checkbo x	If checked, Learner has been disabled by an admin on TI
TI Email	TILBP__TI_Email__c	Email (80)	Learner's Email Address as entered on TI

**TABLE: CONTACT**

Field Label	API Name	Type	Definition
TI External Customer ID	TILBP__TI_externalCustomerId_c	Text (255)	Learner's TI External Customer Id (SSO only)
TI First Name	TILBP__TI_FirstName_c	Text (255)	Learner's First Name as entered on TI
TI ID	TILBP__TI_ID_c	Text (50)	Internal Identifier
TI Last Active At	TILBP__TI_LastActiveAt_c	DateTime	Date and Time Learner was last active on TI
TI Last Name	TILBP__TI_LastName_c	Text (255)	Learner's Last Name as entered on TI
TI Ref1	TILBP__TI_Ref1_c	Text (255)	Text associated with Reference 1 field in TI
TI Ref2	TILBP__TI_Ref2_c	Text (255)	Text associated with Reference 2 field in TI
TI Ref3	TILBP__TI_Ref3_c	Text (255)	Text associated with Reference 3 field in TI

**TABLE: CONTACT**

Field Label	API Name	Type	Definition
TI Ref4	TILBP__TI_Ref4__c	Text (255)	Text associated with Reference 4 field in TI
TI Ref5	TILBP__TI_Ref5__c	Text (255)	Text associated with Reference 5 field in TI
TI Ref6	TILBP__TI_Ref6__c	Text (255)	Text associated with Reference 6 field in TI
TI Ref7	TILBP__TI_Ref7__c	Text (255)	Text associated with Reference 7 field in TI
TI Ref8	TILBP__TI_Ref8__c	Text (255)	Text associated with Reference 8 field in TI
TI Ref9	TILBP__TI_Ref9__c	Text (255)	Text associated with Reference 9 field in TI
TI Ref10	TILBP__TI_Ref10__c	Text (255)	Text associated with Reference 10 field in TI

**TABLE: TILBP\_\_TI\_Assessment\_Attempt\_**

Field Label	API Name	Type	Definition
Answered Questions Count	TILBP__answeredQuestionsCount__c	Number (18, 0)	Total number of questions within the assessment that the learner answered
Company	TILBP__Company__c	Text (50)	Internal Identifier of Site
Correct Questions Count	TILBP__correctQuestionsCount__c	Number (18, 0)	Total number of questions within the assessment that the learner answered correctly
Course	TILBP__SFContent__c	Lookup (Tilbp__Ti_Content__c)	Pointer to the Course the Assessment was attempted in
Created At	TILBP__CreatedAt__c	Datetime	Start time of the assessment attempt
Grade	TILBP__Grade__c	Number (18, 0)	Grade earned on assessment (percentage)
Passed?	TILBP__Passed__c	Checkbox	If checked, the user passed the assessment according to any settings specified in TI
Questions With Choices Count	TILBP__QuestionsWithChoicesCount__c	Number (18, 0)	Total number of questions with choices (multiple choice, image comparison, T/F, select boxes)
Record ID	Id	Id (18)	Salesforce Unique Identifier

**TABLE: TILBP\_\_TI\_Assessment\_Attempt\_**

Field Label	API Name	Type	Definition
Status	TILBP__Status_c	Text (255)	Learners assessment completion status (Started, Finished)
TI Assessment Attempt ID	Name	Text (80)	Internal Identifier of Assessment Attempt
TI ID	TILBP__TI_ID_c	Text (50)	Internal Identifier of Assessment Attempt
Time Elapsed In Seconds	TILBP__timeElapsedInSeconds_c	Number (18, 0)	Total time (in seconds) learner took to complete the assessment
Topic	TILBP__Topic_c	Text (255)	Internal Identifier of Assessment
Topic Title	TILBP__TopicTitle_c	Text (255)	Assessment Title entered on TI
Topic Type	TILBP__TopicType_c	Text (255)	Assessment Type (Quiz, Test, Survey, or Tally)
Unanswered Questions Count	TILBP__UnansweredQuestionsCount_c	Number (18, 0)	Total number of questions within the assessment that the learner did not answer

**TABLE: TILBP\_\_TI\_Assessment\_Attempt\_**

Field Label	API Name	Type	Definition
Updated At	TILBP_UpdatedAt__c	Datetime	Completion time of the assessment attempt
User	TILBP_SFContact__c	Lookup (Contact)	Pointer to the Learner Contact Record

**TABLE: TILBP\_\_TIAssignmentSubmission**

Field Label	API Name	Type	Definition
Asset	TILBP__Asset_ _c	Text (255)	URL of file uploaded by learner
Assignment	TILBP__Assig nmen t_c	Text (50)	Internal Identifier of Assignment
Assignment Title	TILBP__Assig nmen tTitle_c	Text (255)	Title of Assignment entered in TI (full)
Body	TILBP__Body_ _c	Textarea (32768)	Learner's typed submission or comment entered along with upload
Comments Count	TILBP__Comm ents Count_c	Number (18, 0)	Number of comments left on the assignment submission from both the learner and admin
Company	TILBP__Comp any_c	Text (50)	Internal Identifier of Site
Course	TILBP__TICou rse_c	Lookup (Tilbp__Ti_ Content_ C)	Pointer to Content

**TABLE: TILBP\_\_TIAssignmentSubmission**

Field Label	API Name	Type	Definition
Created At	TILBP__CreatedAt__c	Datetime	Time of Assignment Submission
Record ID	Id	Id (18)	Salesforce Unique Identifier
TI Assignment Title	Name	Text (80)	Title of Assignment entered in TI (limited to 80 characters)
TI ID	TILBP__TI_ID__c	Text (50)	Internal Identifier
Updated At	TILBP__UpdatedAt__c	Datetime	Completion time of the assignment submission
User	TILBP__TIUser__c	Lookup (Contact)	Pointer to Learner Contact Record
Video Asset	TILBP__VideoAsset__c	Text (255)	Internal Identifier of Video

**TABLE: TILBP\_\_TI\_Content\_\_c**

Field Label	API Name	Type	Definition
Asset	TILBP__Asset__c	Text (255)	URL
Company	TILBP__Company__c	Text (50)	Internal Identifier of Site
Content Type	TILBP__ContentType__c	Text (255)	Content Type as entered on TI
Course End Date	TILBP__CourseEndDate__c	Datetime	Course End Date as selected on TI
Course Group	TILBP__CourseGroup__c	Text (50)	Internal Identifier of Content
Course Start Date	TILBP__CourseStartDate__c	Datetime	Course Start Date as selected on TI
Created At	TILBP__CreatedAt__c	Datetime	Date and time the Content was created in TI at
Description	TILBP__Description__c	Text (255)	Content Description as entered on TI
Has Children	TILBP__HasChildren__c	Checkbox	If checked, this content is part of a Panorama group
Kind	TILBP__Kind__c	Picklist (courseGroup)	Template Type

**TABLE: TILBP\_\_TI\_Content\_\_c**

Field Label	API Name	Type	Definition
Price In Cents	TILBP_Pri celnCents_ _c	Number (18, 0)	Suggested Retail price (in cents) as entered on TI
Record ID	Id	Id (18)	Salesforce Unique Identifier
Sku	TILBP__Sku _c	Text (255)	Content SKU as entered on TI
Slug	TILBP__Slu g_c	Text (255)	Content slug
Status	TILBP__Sta tus_c	Text (255)	Status of Content (Draft, Published)
Suggested Retail Price In Cents	TILBP__Su ggestedRe tailPricel nCents_c	Number (18, 0)	Suggested Retail price (in cents) as entered on TI
TI ID	TILBP__TI_ D_c	Text (50)	Internal Identifier of Content
TI Title	Name	Text (80)	Content Title as entered on TI
Updated At	TILBP__Up datedAt_c	Datetime	Date and time the Content was last updated in TI at

**TABLE: TILBP\_\_TI\_Content\_Action\_\_c**

Field Label	API Name	Type	Definition
TI Content	TILBP__SF Content__ c	Master-Detail (TI_Content__ c)	Pointer to Content
Source	TILBP__St atus__c	Text (255)	Source of the content action (e.g. started course, certificate grant)
Type	TILBP__Ty pe__c	Text (255)	Type of the content action (e.g. enrollment, status change, certificate grant)
User	TILBP__SF Contac t__c	Lookup (Contact)	Pointer to Contact
Timestamp	TILBP__Cr eatedA t__c	Datetime	Date and time the Content Action occurred

## Common Types & Sources

Type	Source
'enrollment'	'collection_purchase'
'enrollment'	'course_purchase'
'enrollment'	'giftRedemptionCode'
'enrollment'	'manager_bulk_user_creation'
'enrollment'	'manager_course_enrollment'
'enrollment'	'manager_created_user'
'enrollment'	'redemptionCode'
'revoked_access'	'access_expiration'
'revoked_access'	'manager_revoked_access'
status_change'	'course_completed'
status_change'	'course_started'
'certificate_grant'	'passed_exam'
'certificate_grant'	'manager_grant'

**TABLE: TILBP\_\_TIContentTag\_\_c**

Field Label	API Name	Type	Definition
Record ID	Id	Id (18)	Salesforce Unique Identifier
TI Content	TILBP__Content__c	Lookup (Tilbp__Ti_Content__C)	Pointer to Content
TIContentTag ID	Name	Text (80)	Internal Identifier
TI Tag	TILBP__Tag__c	Lookup (Tilbp__Titag__C)	Pointer to Tag

**TABLE: TILBP\_\_TICourseAuthor\_\_c**

Field Label	API Name	Type	Definition
Record ID	Id	Id (18)	Salesforce Unique Identifier
TI Content	TILBP__Content__c	Lookup (Tilbp__Ti__Content__C)	Pointer to Content
TI Course Author Name	Name	Text (80)	Course Author OR Webinar Organizer/Co-Organizer

**TABLE: TILBP\_\_TICustomCourseField\_\_c**

Field Label	API Name	Type	Definition
Content	TILBP__Content__c	Lookup (Tilbp__Ti_Content__C)	Pointer to Content
Field	TILBP__Field__c	Lookup (Tilbp__Ticustomfield__C)	Pointer to Custom Field
Record ID	Id	Id (18)	Salesforce Unique Identifier
TI Custom Course Field Name	Name	Text (80)	Internal Identifier
Value	TILBP__Value__c	Text (255)	Value of Custom Field

**TABLE: TILBP\_\_TICustomField\_\_c**

Field Label	API Name	Type	Definition
Record ID	Id	Id (18)	Salesforce Unique Identifier
TI Custom Field Name	Name	Text (80)	Name of Custom Field as entered on TI

**TABLE: TILBP\_\_TIPurchasedCourse\_\_c**

Field Label	API Name	Type	Definition
Course	TILBP__TICourse__c	Lookup (Tilbp__Ti_Content__C)	Pointer to Content
Status	TILBP__Status__c	Text (255)	Learner's Status (started, not-started, completed)
TI Purchased Course Name	Name	Text (80)	Title of Content as entered in TI
TI User	TILBP__TIUser__c	Lookup (Contact)	Pointer to Contact
Total Time Seconds	TILBP__TotalTimeSeconds__c	Number (18, 0)	Total time in seconds that the learner has spent in the content
Total Views	TILBP__TotalViews__c	Number (18, 0)	Total # of times the learner has viewed content
Percent Complete	TILBP__PercentComplete__c	Number (3, 0)	Percent Complete

**TABLE: TILBP\_\_TI\_Question\_\_c**

Field Label	API Name	Type	Definition
Answer	TILBP__Answer__c	Text (255)	Answer selected in Assessment Attempt
Assessment Attempt	TILBP__SFAssessmentAttempt__c	Lookup (Tilbp__Ti_Assessment_Attempt__C)	Pointer to Assessment Attempt
Correct?	TILBP__Correct__c	Checkbox	If checked, the answer selected is correct
Question	TILBP__Question__c	Text (255)	Question text as entered on TI
Record ID	Id	Id (18)	Salesforce Unique Identifier
TI Question ID	Name	Text (80)	Internal Identifier

**TABLE: TILBP\_\_TITag\_\_c**

Field Label	API Name	Type	Definition
Record ID	Id	Id (18)	Salesforce Unique Identifier
Tag	Name	Text (80)	Tag Label as entered on TI

**TABLE: TILBP\_\_TI\_LearningPathAction\_\_c**

Field Label	API Name	Type	Definition
TI Learning Path Action ID	Name	Text(80)	Name of the learning path action
Ti Content	TILBP__TI_SFContent__c	Lookup (TI Content)	Content within the Learning Path
Milestone Name	TILBP__MilestoneName__c	Text(50)	Name of Milestone in Learning Path
Source	TILBP__Source__c	Text(255)	Source of the Learning Path Action (started, completed)
Timestamp	TILBP__Timestamp__c	Date/Time	Date and time the Learning Path Action occurred
Type	TILBP__Type__c	Text(255)	Type of Learning Path Action (e.g. enrollment, status change, certificate grant)
Contact	TILBP__Contact__c	Lookup(Contact)	Learner contact performing the Learning Path action
TI ID	TILBP__TI_ID__c	Text(50)	ID of the Learning Path as entered in TI

**TABLE: TILBP\_\_TI\_Certificate\_\_c**

Field Label	API Name	Type	Definition
TI Certificate ID	Name	Auto Number: TICT- {0000000}	Salesforce auto-generated certificate identifier
Expiration Date	TILBP__ExpirationDate__c	Date/Time	Expiration of the certificate
Issue Date	TILBP__IssueDate__c	Date/Time	Granted date of the certificate
Progress Was Reset	TILBP__ProgressWasReset__c	Boolean	True/False value on whether content progress was reset for recertification
TI Content	TILBP__TIFContent__c	Lookup(TI Content)	Content completed to grant certificate
URL	TILBP__URL__c	URL	URL of the Certificate when granted to learner
Contact	TILBP__Contact__c	Lookup(Contact)	Learner contact recipient of the certificate
TI ID	TILBP__TI_ID__c	Text(50)	ID of the Certificate

**TABLE: TILBP\_\_TI\_Purchase\_\_c**

Field Label	API Name	Type	Definition
TI Purchase Name	Name	Text(80)	Name of the Purchase
TI ID	TILBP__TI_ID__c	Text(50) (External ID) (Unique Case Sensitive)	Unique transaction id mapped as '[companyId]-[timestamp]-[charged]'
Amount Charged (number)	TILBP__AmountCharged__c	Number(18,0)	Amount customer was charged (only for charges)
Amount Discounted (number)	TILBP__AmountDiscounted__c	Number(18,0)	Amount discounted from the original price
Amount Disputed (number)	TILBP__AmountDisputed__c	Number(18,0)	Amount disputed by customer (only for disputes)
Amount Net (number)	TILBP__AmountNet__c	Number(18,0)	Net amount charged (negative for refund/dispute)
Amount Refunded (number)	TILBP__AmountRefunded__c	Number(18,0)	Amount customer was refunded (only for refunds)
Coupon (string)	TILBP__Coupon__c	Text(255)	Coupon code used to purchase the course

**TABLE: TILBP\_\_TI\_Purchase\_\_c**

Field Label	API Name	Type	Definition
Timestamp (date/time)	TILBP__Timestamp__c	Date/Time	Date and time of charge
Failure Code (string)	TILBP__FailureCode__c	Text(255)	Failure code in case of failed charge
Failure Message (string)	TILBP__FailureMessage__c	Text(255)	Reason for the failure
Gift Recipient Email (email/string)	TILBP__GiftRecipientEmail__c	Email	Email of the recipient of the gifted purchase
Group ID (String, External ID, non-unique)	TILBP__Group_ID__c	Text(255) (External ID)	Original stripe charge's id (for charges, identical to charged, for refunds/disputes, charged of original refunded/disputed charge)
Description (String)	TILBP__Description__c	Text(255)	Description of the purchase
Items (number)	TILBP__Items__c	Number(18,0)	Items within the purchase
Order ID (String, External ID, non-unique)	TILBP__Order_ID__c	Text(255) (External ID)	TI-assigned order id for cart (more reliable for grouping cart items when there are free courses)

**TABLE: TILBP\_\_TI\_Purchase\_\_c**

Field Label	API Name	Type	Definition
Purchase ID (String, External ID, non-unique)	TILBP__Purchase_ID__c	Text(255) (External ID)	ID of the Purchase
Purchase Revenue Type (String)	TILBP__PurchaseRevenueType__c	Text(255)	Purchasable's unique id
Purchase Type (String)	TILBP__PurchaseType__c	Text(255)	'course', 'product', or 'discountGroup' (collection)
Quantity (number)	TILBP__Quantity__c	Number(18,0)	Quantity of items purchased, usually 1
Success (boolean)	TILBP__Success__c	Boolean	True/False if charge was successful
Type (String)	TILBP__Type__c	Text(255)	Charge, refund, dispute, or free
Contact (linking to Contact Object)	TILBP__Contact__c	Lookup(Contact)	Contact who made the purchase

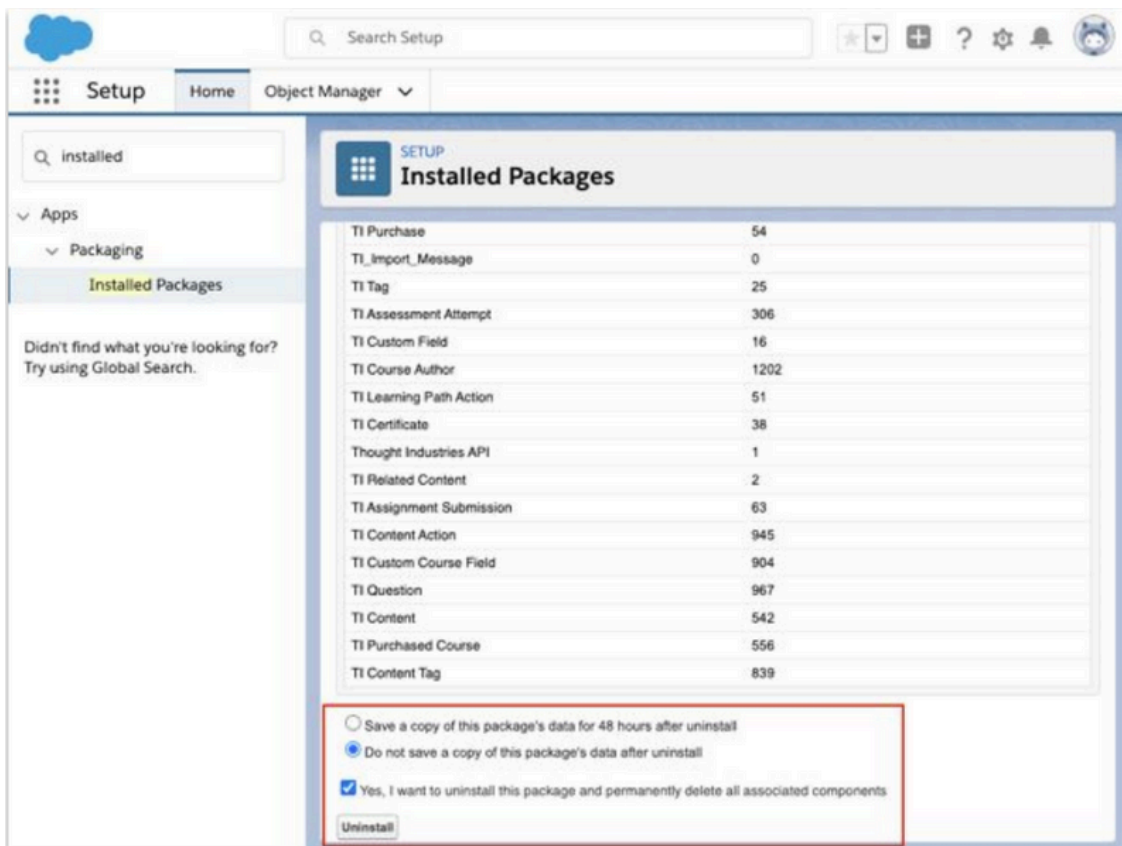
**TABLE: TILBP\_\_TI\_Related\_Content\_\_c**

Field Label	API Name	Type	Definition
Primary Content	TILBP__Primary_Content__c	Master-Detail(TI Content)	Collection name
Secondary Content	TILBP__Secondary_Content__c	Lookup(TI Content)	Content within the Collection name

## UPGRADE SALESFORCE MANAGED PACKAGE

### Uninstall Package

Navigate to **Setup**, then use Quick Find to find **Installed Packages**. From there, locate the **Thought Industries** and click **Uninstall**. At the bottom of the next page, you can save a copy of the data if you want, but we recommend checking **Do not save a copy of this package's data after uninstall** as the upgrade process will sync this data from Thought Industries directly; no data will be lost.



Package Name	Count
TI Purchase	54
TI_import_Message	0
TI Tag	25
TI Assessment Attempt	306
TI Custom Field	16
TI Course Author	1202
TI Learning Path Action	51
TI Certificate	38
Thought Industries API	1
TI Related Content	2
TI Assignment Submission	63
TI Content Action	945
TI Custom Course Field	904
TI Question	967
TI Content	542
TI Purchased Course	556
TI Content Tag	839

Save a copy of this package's data for 48 hours after uninstall  
 Do not save a copy of this package's data after uninstall  
 Yes, I want to uninstall this package and permanently delete all associated components

You will need to wait until the uninstallation is complete before reinstalling. You can see the uninstallation status at the bottom of the next page.

Uninstalled Packages					
Action	Package Name	Namespace	Expiration Date	Uninstall Status	Uninstall Date
	Thought Industries for Salesforce (Version Name Ti)	TILBP	6/4/2020 3:22 PM	In Progress	6/2/2020 3:22 PM

## UPGRADE SALESFORCE MANAGED PACKAGE

### Adding the Upgraded Managed Package

To continue upgrading, place the version link in the URL Bar of your browser. After loading the page, you will see three options:

1. Install for Admins Only
2. Install for All Users
3. Install for Specific Profiles

Because this package is governed at the instance level and individual access to the package is provided through permission sets, select the **Install for All Users** option, and then click **Install**.

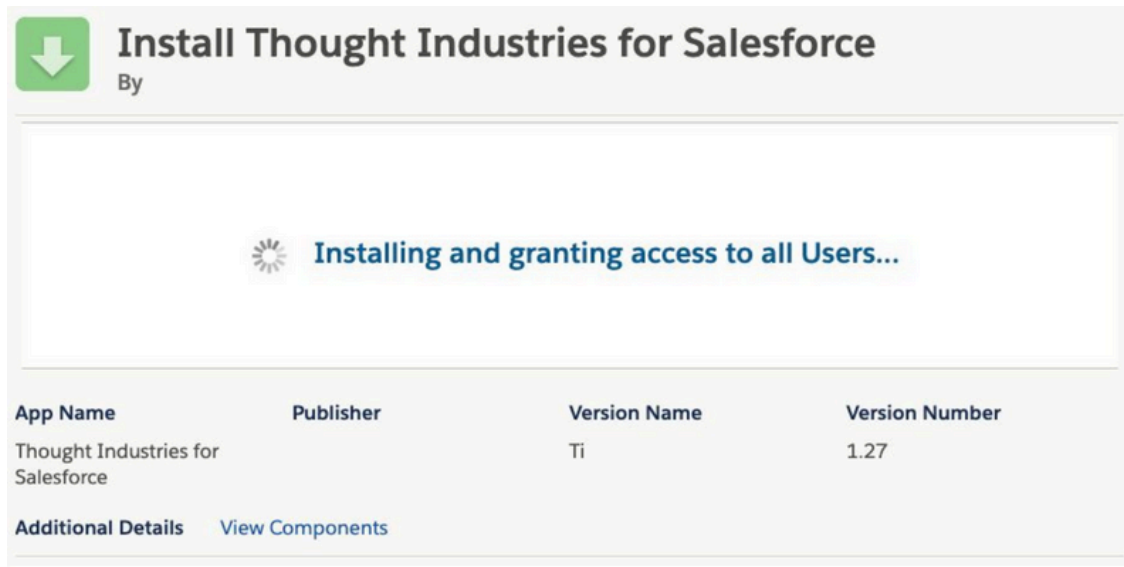


App Name	Publisher	Version Name	Version Number
Thought Industries for Salesforce		Ti	1.27

[Additional Details](#) [View Components](#)

## UPGRADE SALESFORCE MANAGED PACKAGE

The package will then be installed based on your selection during Step 1.



The system will let you know once the package has been installed. From there, simply click **Done**.



After the package is installed, you will be directed to a Salesforce Setup page for Installed Packages. To confirm the package is installed, look for Thought Industries for Salesforce on the page.

## UPGRADE SALESFORCE MANAGED PACKAGE

### Connecting to Salesforce

Once the new package is installed, you will need to reconnect in Thought Industries.

To reconnect, simply navigate to **Settings > Connections > Third-Party**. Click **Reconnect to a different account**.

SALESFORCE

You are connected to Salesforce with the organization Thought Industries (chris@thoughtindustries.com.leadership)

**Installed Managed Package Version**

Spring 2020

**Enable Account Matching?**  
When enabled, we will try to associate new Contacts to Accounts in Salesforce based on their email address domain. For example, all @acme-corp.com email addresses would go into the ACME Corp Account. No

**Account ID**

We'll create new Contacts in the Account ID you specify here. If not specified, we will create new Contacts without an Account association.

**Sync Time**

13:00

The time the sync should execute, in the instance timezone.

[Execute Test Sync](#) [Save](#)

[If you'd like to connect to a different Salesforce account, click here.](#)



# Powering the Business of Learning

