



TARGETX
SUMMER '16

Upgrade Guide



Revision History

Version	Date	Log
1.0	8/26/16	Initial Released Version
1.1	9/12/16	Added step to Events to Configure Remote Site Setting



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READ ME FIRST

This document outlines the upgrade steps for the various TargetX product packages which are part of the [Summer '16 Release](#). You are encouraged to read over this document **before you begin** installation in order to familiarize yourself with prerequisites, new fields, and basic steps for upgrading.

A. Use of this Guide

This document is intended to be used by **Administrators** as a guide to upgrade to the new Summer '16 release. This document assumes the following:

1. Administrators have an intermediate level of Salesforce administrative knowledge
2. Upgrades are being implemented on top of the previous TargetX Spring '16 release
3. Administrators are aware of customizations to their orgs beyond or separate from the initial TargetX CRM implementation

We have made every attempt possible to provide clear instructions for standard baseline org, and please note that certain adaptations may need to be made based on your customizations.

B. Upgrade Instructions

This document is an overview of how to upgrade TargetX . You are strongly encouraged to review this document before beginning any upgrades.

If you are upgrading ALL the packages:

Follow the upgrade steps in the order listed in the *Table of Contents*.

If you are upgrading ONE or SOME of the packages:

Follow the upgrade steps in the order listed in the Table of Contents, skipping any steps that don't apply to your institution's implemented solution.

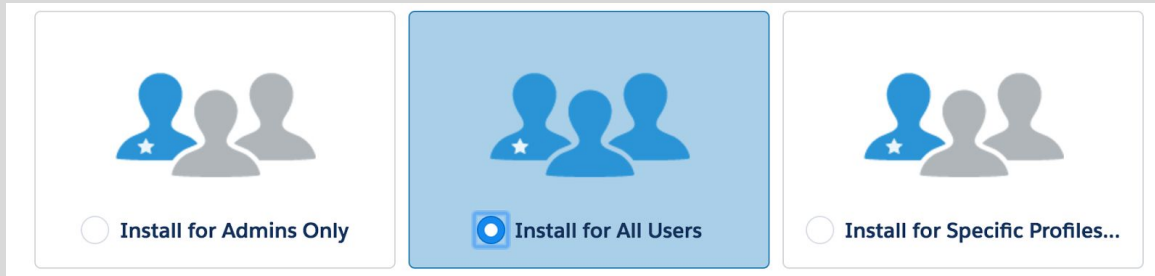
Note: Per the order of packages upgrade instructions in this document, please be aware that all clients must begin their upgrade with the **TargetX Base** and **TargetX Recruitment Manager** packages first. Following the Base and Recruitment Manager upgrades, proceed with the upgrade steps for each of the various products to which your institution has subscribed.

If your institution is interested in adding additional product subscriptions, please contact your friendly account executive.



***** Important - Please Read *****

TargetX **highly recommends** completing all upgrades in a **sandbox environment** prior to upgrading in production. Once packages are installed into your production environment, they cannot be uninstalled or rolled back.



TargetX also recommends installing with access for *All Users* for full product functionality to be available. Post-installation, CRM Admins should review institutional user profiles, in conjunction with new fields and objects included in this package, to ensure appropriate access levels are defined. Minimum permissions are specified where required.

SUMMER '16 RELEASE SCOPE

The feature matrix below provides a high level overview of the features that are either new or have been enhanced within each module.

How to use this matrix: The columns are TargetX modules and the rows are features that are in scope for the Summer '16 release.

- First, identify which TargetX modules apply to your institution.
- Second, note the check marks in the module column because the associated features are either new or have been enhanced.

Note: For more details or questions about licensing products, please reach out to your friendly account executive.

Release scope matrix on next page



The use of each Summer '16 Feature does not apply to all institutions and depends on the implemented solution. For example, if your institution uses Prospect then you may be interested in updates to Events, Email, Portal, Group Assignments, and Schools App, but you may not be currently using those features.

Summer '16 Feature	Recruitment CRM			Retention CRM
	Prospect	Online Application	Decision	
Events (version 6.1) NEW DESIGN <ul style="list-style-type: none"> - Mobile-First Design - Calendar & list views - Featured Events Carousel - Search & filtering (including nearby events based on geolocation) - My Events for self-management - Streamlined Event Registration - Event confirmation page with recommended events 	✓	✓		✓
Email <ul style="list-style-type: none"> - Email Content Block Designer - Email Broadcast Preview - Follow Up Broadcast Email 	✓	✓	✓	✓
TargetX Portal NEW <ul style="list-style-type: none"> - Powered by New TargetX Builder - Point & click creation of student portals - Configurable dynamic content - Widgets such as Application, Checklist, and Events (requires separate licensing)	✓	✓	✓	✓
Applicant Dashboard <ul style="list-style-type: none"> - Now for all applicants including Common App 		✓		
Group Assignments NEW <ul style="list-style-type: none"> - Point & click usability! No more code. 	✓	✓		
Schools App (Available October 2016) <ul style="list-style-type: none"> - Study Group Finder - Group Messaging 	✓			✓
Online Application <ul style="list-style-type: none"> - Application Fee Discounts - School Picker for registration - Students can update "key questions" - View submitted application snapshot 		✓		
TargetX Decision <ul style="list-style-type: none"> - PDF caching for faster load times - Easy navigation between applications 			✓	



PRODUCT UPGRADE INSTRUCTIONS

A. Base

This update includes new product enhancements that include:

- TargetX Builder
 - Group Assignments
- Locations with Geocoding

For further information, please see: [Summer '16 Release Notes](#).

Released Version	TargetX Base 1.77	
Prerequisites	None	
New Objects/ Fields	<u>Objects</u>	<u>New Fields</u>
	Assignment Group (NEW)	Active Description Expression OrderNr Target Object
	Assignment Group Member (NEW)	Assignment Group Group Member Records Owned
	Configuration (NEW)	Category Configuration Type Description JSON 1 JSON 2 JSON 3 Package Version Published Revision TX ID
	Expression (NEW)	AdvancedExpression Function OrderNr ParameterExpression ParameterField ParameterValueBoolean ParameterValueDate ParameterValueDateTime ParameterValueNumber ParameterValueText ParentExpression
	Group Assignment Settings	Active Evaluation Field Object Owner Field Use @ Future
	Location (NEW)	Building



		Campus City Country Geolocation Room State/Province Street Zip/Postal Code
	Remote Connections	Client Id Client Secret Login Url
	TargetX Profile Settings	Events Access SSC Access
	TargetX License Settings (NEW Custom Setting)	License Check Enabled
	TargetX CRM Base Settings	Google Maps Geocoding API Key

Step 1 Install TargetX Base Package

1. To obtain package links and passwords, please see the [CRM Community Chatter Feed](#).
2. Choose ALL USERS. If additional security is required, please update the appropriate Profiles.
3. When the base package is installed successfully, click on **Done** when you see the following message:



Step 2 Confirm Upgrade Is Complete

Congratulations! You've successfully completed the install/upgrade of TargetX Base package!

1. Verify **Installed Packages** lists TargetX Base package as version 1.77.

<u>TargetX Base</u>	TargetX	1.77	TargetX_Base
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For detailed information on Permissions, see: [Field-Level Security by Product](#).

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B. Recruitment Manager

This update includes a new field for Applicant Dashboard and new fields for the Common Application 2016-17 data import. See also: [Summer '16 Release Notes](#).

Released Version	TargetX Recruitment Manager 2.79	
Prerequisites	TargetX Base package 1.77 and above	
New Objects/ Fields	Objects	New Fields
	Application <i>(Support the Applicant Dashboard)</i>	Portal Application Label
	Contact <i>(Support the 2016-2017 Common Application Import)</i>	Gender Identity Military Branch Military Branch2 Military Branch3 Military Service Start Date2 Military Service Start Date3 Military Service End Date2 Military Service End Date3 Parent's Divorce Year Visa Date Issued Visa Number
<i>The new fields delivered with TargetX Recruitment Manager 2.79 support the 2016-2017 Common Application Data Import and TargetX Applicant Dashboard.</i>		

Table 1. New Recruitment Manager Objects and Fields in Summer '16

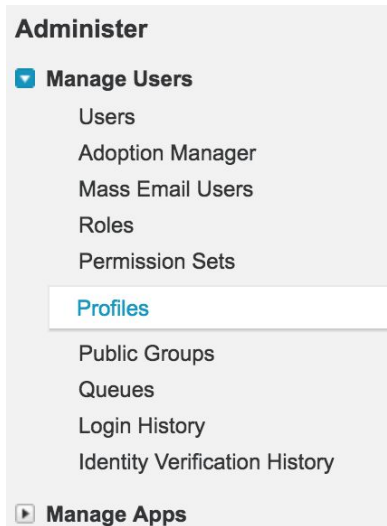
Step 1 Install TargetX Recruitment Manager Package

1. To obtain package links and passwords, please see the [CRM Community Chatter Feed](#).
2. Choose **ALL USERS**. If additional security is required, please update the appropriate *Profiles*.
3. Click **Upgrade/Install** to continue the installation process.
4. Once the installation is complete; Click on **Done**.

Step 2 Update Internal CRM User Profile Permissions

Upon install, all internal user profiles will have edit access to new fields and objects (see Table 1 above) installed as part of the upgrade. Please review your individual profiles to further restrict access as desired.

To update profiles, please navigate to **Setup -> Administer -> Manage Users -> Profiles**:



Step 3 Update Page Layouts (optional)

[New fields delivered in the upgrade](#) must be added to page layouts for full user access. There are two page layouts that you may wish to add some or all of the new fields to: **Application** and **Contacts**.

1. **Application Page Layout:**
Navigate to the Objects Section; **Setup > Build > Create > Objects**.
2. Click on the *Object Label* for the **Application** object:
3. Scroll down to the *Page Layouts* section click **Edit** next to the layout you wish to update.
4. From the page layout palette, select the *Fields* group and then drag the [new fields](#) and place them on the layout as desired.
5. **Save** your changes.
6. For the **Contacts** Page Layout:
Navigate to **Setup > Build > Customize > Contacts > Page Layouts**
7. Select those Page Layouts you wish to update and click **Edit**.
8. Search for **new fields** below and place them on the layout as desired:
 - Gender Identity
 - Military Branch
 - Military Branch2
 - Military Branch3
 - Military Service Start Date2
 - Military Service Start Date3
 - Military Service End Date2
 - Military Service End Date3
 - Parent's Divorce Year
 - Visa Date Issued



- Visa Number

9. **Save** your changes.

Step 4 Confirm Upgrade Is Complete

Congratulations! You've successfully completed the install/upgrade of TargetX Recruitment Manager package!

1. Verify **Installed Packages** lists TargetX Recruitment Manager package as version 2.79.

<u>TargetX Recruitment Manager</u>	TargetX	2.79	TargetX_SRMb
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C. Payment Connector

Released Version	TargetX Payment Connector 1.52	
Prerequisites	None	
New Objects/ Fields	Objects	New Fields
	Payment Connector	TransID Name

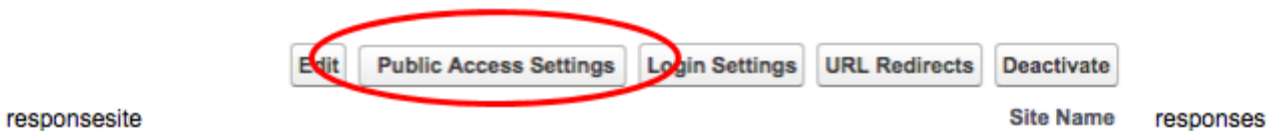
Step 1 Install TargetX Payment Connector

1. To obtain package links and passwords, please see the [CRM Community Chatter Feed](#).
2. Choose "Install for All Users". If additional security is required, please update the appropriate Profiles.

Step 2 Enable Field Level Security for Sites

If you are currently using Sites, Field level security needs to be updated, for the **TransID Name** field, for your *Online Application* and *Events* sites.

1. Navigate to **Setup > Develop > Sites**.
2. Click on your Site Label for your Events site.
3. Click the **Public Access Settings** button.



4. In the **Field-Level Security > Custom Field-Level Security** section, click on [[View](#)] to the right of the *Payment Connector* object.

Organization Event	[View]
Payment Connector	[View]
Payment Detail	[View]



5. Click the **Edit** button.
6. Check the **Read access** permission to the right of the TransID Name field.

TransID Name	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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7. Click the **Save** button.
8. If you are using the Online Application , perform the same steps for your Online Application site.

See also: [How to Configure Payment Gateways.](#)

Step 3 Enable Field Level Security for Community Profiles

This step is required for customers using Salesforce Communities. Field level security needs to be updated for the **TransID Name** field for all community profiles that are involved in Payment Connector. This includes any community profile that has access to payments in your Events and/or Online Application community.

Note: These instructions assume you are using the Salesforce Standard View. If you are instead using the Enhanced User Profile Interface your experience will be significantly different. To activate/deactivate the Enhanced User Profile Interface see [this](#) document.

1. Navigate to **Setup > Manage Users > Profiles.**
2. Click on the name of the community profile.
3. In the **Field-Level Security > Custom Field-Level Security** section, click on [[View](#)] to the right of the Payment Connector object.
4. Click the **Edit** button.
5. Check the Read-Only permission to the right of the TransID Name field.

TransID Name	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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6. Click the **Save** button.
7. Perform the same steps for your any other Community Profile(s).

Step 4 Confirm Upgrade Is Complete

Congratulations! You've successfully completed the install/upgrade of TargetX Payment Connector package!

1. Verify **Installed Packages** lists TargetX Payment Connector package as version 1.52.



<u>TargetX Payment Connector</u>	TargetX	1.52	targetx_payment
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D. Email

We have added the following enhancements to our Email product giving our users additional campaign planning tools for an improved Admin experience, including:

- As a follow up to the Spring '16 release of email conditional content, **labels** can now be assigned to conditional conditional and dynamics content blocks to make it easier to organize and find content.
- A new **Email Broadcast Preview** allows users to preview messages directly in the email campaign builder.
- **Improved screen layout** for viewing email results on a Contact record using consistent column indicators.
- Improvements to the Email Campaign Builder to support email communication flow planning, including the ability to set **follow up email broadcasts** based on whether the recipient opened the original email or not.

See also: [Summer '16 Release Notes](#).

Released Version	TargetX Email 3.32	
Prerequisites	None	
New Objects/ Fields	<u>Objects</u>	<u>New Fields</u>
	Broadcast	Broadcast Type Follow up broadcast Id
	Campaign	EmailTemplate Follow up Open Email EmailTemplate Follow up Un Open Email
	Content Location	Filter
	Rule Action	Label

Step 1 Install Email Package

1. To obtain package links and passwords, please see the [CRM Community Chatter Feed](#).
2. Choose ALL USERS. If additional security is required, please update the appropriate Profiles.
3. Click on **Done**.

Step 2 Verify Conditional Content is enabled

1. Navigate to the **Email Preferences** tab by clicking the + to see *All tabs* available to you.



- Under the *Advanced* section, verify the **Enable Merged Content Blocks** is checked. For more information, please see: [Email Content Blocks](#).

- Click on **“Save the Preferences”**.

Step 3 Contact Client Services to Enable New Features

By default, follow up broadcast features will be turned **off**. After you have upgraded your TargetX Email package, please open a case with **Client Services** to enable the new “Follow up broadcast” feature. For more information, please see: [Email Admin Guide](#) - *Email Campaign Builder and managing email conditional planning*.

Follow Up Broadcast Email Section- On the Email Campaign Builder Page

Follow up broadcast features are an improvement to the **Email Campaign Builder** to support email communication flow planning, including the ability to set follow up email broadcasts from within the Email Campaign Builder (when selecting immediate or once under the Delivery Schedule) based on whether the recipient opened the original email.

Step 4 Confirm Upgrade Is Complete

Congratulations! You’ve successfully completed the install/upgrade of TargetX Email package!

- Verify Installed Packages lists **TargetX Email 3.31**



2. Verify the **Enable Merged Content Blocks** is checked under the email preferences tab
3. Verify the **Preview** button and the **Follow Up Broadcast** section is present under the Email Campaign Builder page.

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E. Events

Improve student and prospect engagement with the updated student-facing user-interface for **Events** that delivers unprecedented usability to help students find and register for events - including recommended events, invited events, and location-based search for events nearby – all on any device. See also: [Summer '16 Release Notes](#).

Released Version	TargetX Events 6.1		
Prerequisites	TargetX Base 1.77 TargetX Payment Connector 1.52		
New Objects/ Fields	Objects	New Fields	Additional Information
	Recommended Events(NEW)	Description Event Name Match Category Match Location Match Type Priority Results Category Results Location Results Type	Allows you to direct the student to other recommended events based on the event for which they just registered.
	Organization Event	Event Keywords Field 1 Required Field 2 Required Field 3 Required Field 4 Required Field 5 Required Field 6 Required Field 7 Required Field 8 Required Field 9 Required Field 10 Required Ignore Recommended Events Location Lookup Cancel Deadline Event Notes Invite Only Invitee Campaign More Information	Fields add support for: <ul style="list-style-type: none"> Enabling custom questions to be supplied either optional or required. Associating an invitee list for Events More information can be provided in Rich Text format
	Location (NEW)	Filter Value	Allows categorization in the events interface as well as a URL parameter. For more information, see: Location Lookup Object .
	Contact Schedule Item	Invited Primary Event Responsibility	Per event for each student attendee, track Invited status. Per event for each staff/volunteer, track their primary event role/responsibility.



	Community Theme	Events Custom Setting	Relates the student-facing events UI (via Community Theme) with a corresponding Events Configuration setting.
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Note: These instructions assume you are using the Salesforce Standard View. If you are instead using the Enhanced User Profile Interface your experience will be significantly different. To activate/deactivate the Enhanced User Profile Interface see [this](#) document.

Step 1 Install TargetX Events Package

1. To obtain package links and passwords, please see the [CRM Community Chatter Feed](#).
2. Choose ALL USERS. If additional security is required, please update the appropriate Profiles.

Step 2 Configure Events Custom Settings

For more information about Event Custom Settings see: [Events Custom Settings](#).

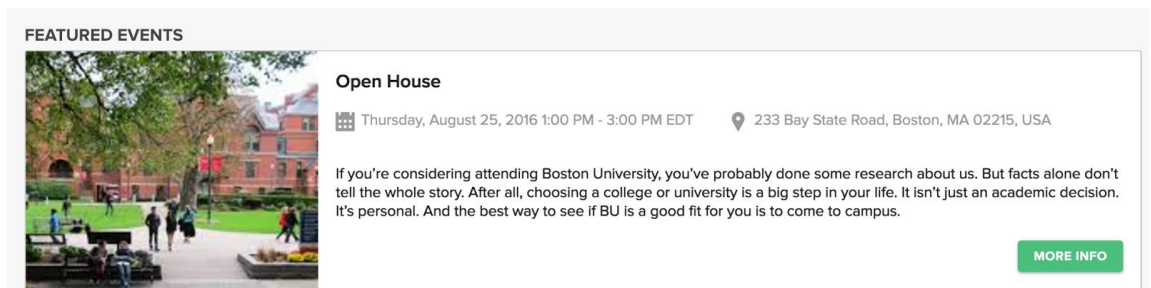
1. Use the following instructions to configure Events custom settings and navigate to the **Events Settings** page:
 - a. **Copy** your Salesforce URL, up and including the .com
 - i. Example: https://na10.salesforce.com
 - b. **Append** your Salesforce URL with /apex/targetx_eventsb__eventssettings
 - i. Example: https://na10.salesforce.com/apex/targetx_eventsb__eventssettings

2. Under the **Advanced Options** section, confirm the following **Events Settings** are defined based on your institutional preferences, see below for details on each setting:
 - *Number of Featured Events Displayed*
 - *Use Location Lookup*
 - *Google Maps Geocoding API Key*
 - *Header Logo URL*



Advanced Options			
Template Override	None	Default Allow Overlap	<input type="checkbox"/>
Default Number of Guests	4	Default Email Sender Id	
Default QR Check In Hours Before Event	1.00	Registration Deadline Days Before Event	0
Default QR Check In Hours After Event	2.00	Events Plus Results Height	750
Maximum Returned Events		Pending Event Reg Expiration	
School Filter Field		Other Defaults	
Cost Column Mode	Always Show	Default Search Duration	90
Restrict Event Ownership	<input type="checkbox"/>	Custom Payment Parameters	
Email Confirmation For Each Event	<input type="checkbox"/>	Email Reminder Days	
Number of Featured Events Displayed		Use Location Lookup	<input type="checkbox"/>
Google Maps API Key		Header Logo URL	

- **Number of Featured Events Displayed** - (Number Field)
Indicates the maximum number of Featured Events that will appear in the *Featured Events Carousel*.
Example:



Events will rotate through the Featured Events carousel starting with the current date forward, showing no more than the number defined in this setting.

- The default Number of Features Events Displayed is four (4) - if this custom setting field is left blank.
- TargetX recommends setting the Number of Featured Events Displayed between two (2) and five (5) Featured Events.
- To avoid or , set the Number of Features Events no larger than twenty (20)
- Do not set the Number of Featured Events Displayed higher than twenty (20) - to ensure properly display to students.



- **Use Location Lookup** - (Checkbox)
If checked, Events can be filtered and searched for using the **Location lookup object**, which supports geolocation searches. Use of this feature requires that your institution obtain a **Google Maps Geocoding API Key** to function properly.

Note: If **Location Lookup** is checked, Events will **no longer use** the "Location" picklist field on the Organization Event object when filtering or searching for events. Existing event URLs that use the Location picklist field will not work unless a matching Location record is created in the Location object.

For more information on how to use and create **Locations**, please see: [Location Lookup Object](#).

- **Google Maps API Key** - (String Field)
Supports populating geolocation information related to event locations (Latitude & Longitude) and the new **Nearby Events** search functionality. To use this feature, you must have a valid Google Maps Geocoding API Key from Google.

Follow the steps below to obtain a Google Maps Geocoding API Key from Google:

1. Click this link:
<https://developers.google.com/maps/documentation/geocoding/get-api-key>
2. Select **Get A Key** (under Standard API section)
3. Create a **Project** of any name
4. Click **Enable API**
5. You will get message stating 'You're all set'.
6. **Copy** the API Key.
7. Paste the API Key into the **Google Maps API Key** field.

***Notes:**

- Events leverages the Standard API Keys (not Premium API Keys).
 - Please copy this Google Maps API Key to a safe location. You will use this Google Maps API Key in a subsequent step.
- **Header Logo URL** - (String Field)
This URL will redirect the student to the specified website when they click on the Header Logo Image.



- Upon completing the **Advanced Options** settings; **Save your changes**.

Step 3 Configure TargetX CRM Base Settings

To complete configuration of the new **Events Nearby** search functionality, you must update the **Google Maps Geocoding API Key** in the **TargetX CRM Base Settings**. This will ensure your Location records are able to get geolocation information (latitude, longitude) any time Location records are inserted or updated with new address information.

- Navigate to **Setup > Build > Develop > Custom Settings**.
- Click **Manage** next to the **TargetX CRM Base Settings**

Custom Settings [Help for this](#)

Use custom settings to create and manage custom data at the organization, profile, and user levels. Custom settings are stored in the application cache. This means you can access it efficiently, without the cost of repeated queries. Custom settings data can be used by formula fields, Visualforce, Apex, and the Force.com Web Services API.

✔ **Percentage of custom settings data used: 0.13%**
You are currently using 0.01 MB of custom settings data in your organization, out of an allowed limit of 10 MB.

View: All [Create New View](#)

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

Action	Label	Visibility	Settings Type	Namespace Prefix	Description	Record Size	Number of Records
Manage	TargetX CRM Base Settings	Public	List	TargetX_Base		425	1
Manage	TargetX PDF Merging Service	Public	Hierarchy	TargetX_Reader	Setting to store heroku app endpoint	610	1



3. Click **Edit** next to the **Default** custom setting
4. Add your **Google Maps Geocoding API Key** and **save** your changes.

TargetX CRM Base Settings Edit Help

Provide values for the fields you created. This data is cached with the application.

Edit TargetX CRM Base Settings Save Save & New Cancel

TargetX CRM Base Settings Information = Required

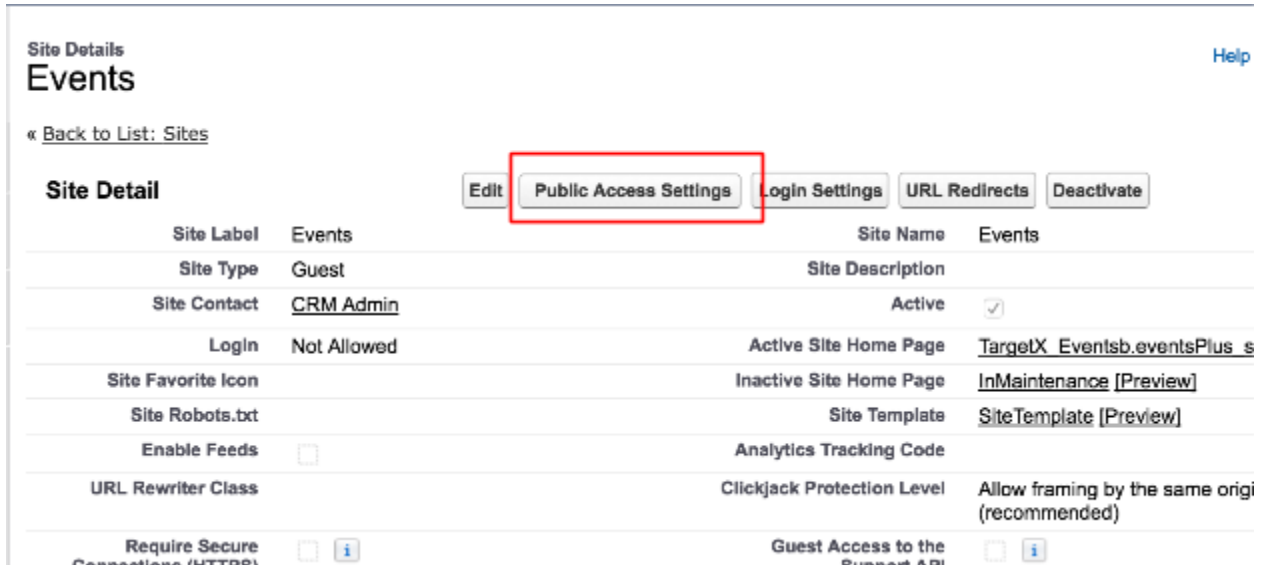
Name	Default
Process Access Keys @future	<input checked="" type="checkbox"/>
Save Contact Merge Ids	<input type="checkbox"/>
Save Lead Merge Ids	<input type="checkbox"/>
Default Account ID	<input type="text"/>
Action Plan Automation	<input checked="" type="checkbox"/>
Currency Symbol	\$
Days to keep logs	<input type="text"/>
Debugging Threshold	<input type="text"/>
Google Maps API Key	AlzaSyAePEMfYEK7iqq_)

Step 4 Configure Remote Site Setting for Google Maps Geocoding API

1. Navigate to **Setup > Administer > Security Controls > Remote Site Settings**.
2. Click **New Remote Site**.
3. Enter the following:
 - Remote Site Name = Google_Maps_Geocoding_API
 - Remote Site URL = <https://maps.googleapis.com>
 - Active = Checked
4. Select **Save**.

Step 5 Configure New Event Permissions

5. Navigate to **Setup > Build > Develop > Sites**.
6. Click the *Site Label* for your Events site. If your institution has not yet setup an Event Site, please see: [Events Community & Site Configuration Guide](#).



7. Click **Public Access Settings**.
8. Update the following Event Site permissions:
 - a. Scroll to the *Enabled Visualforce Page Access* section.
 - b. Click the **Edit** button
 - c. Add the pages below into the **Enabled Visualforce Pages** column:
 - i. TargetX_Eventsb.events
 - ii. TargetX_Eventsb.PayButton
 - d. Click **Save**
9. Include the permissions outlined in the document: [Field-Level Security by Product](#), Event Registration (Student-facing) *tab*.

Note: Customers using the Applicant Dashboard must **repeat Step 4** for the Customer Community User profile used for the Application Community.

Step 6 Configure Default Poster and Thumbnail images

Two (2) types of images can be related to Events in the Summer '16 release:

1. Poster Image → Larger image that displays on the Event Detail page
2. Thumbnail Image → Smaller image that displays if the Event is marked as a Featured Event and appears in the *Featured Events* carousel.

Two (2) levels of images can be configured related to Events in the Summer '16 release:

1. Global default images
 - These images will serve as the default image when event-specific images are not configured.
2. Event-specific images



- If event-specific images exist, these images will override the global default images.

The steps below will allow you to configure global default images for all events - for both Poster and Thumbnail image types.

For additional information on how to configure event-specific images, see: [Events Admin Guide](#).

Steps to setup **global default Poster image**:

1. Ensure desired default images are saved and accessible as image files
2. Go to **Setup > Develop > Static Resources**
3. Click **New**
 - Enter the Name as:
 - eventsDefaultPoster
 - Select and upload your default Poster file image
 - Optimal image size is 768x1024
 - Set Cache Control to *Public*
4. Click **Save**

Static Resource Edit [Save] [Cancel]

Static Resource Information

Name: eventsDefaultPoster

Description:

File: [Choose File] No file chosen

Cache Control: Public

[Save] [Cancel]

Steps to setup **global default Thumbnail image**:

1. Ensure desired default images are saved and accessible as image files
2. Go to **Setup > Develop > Static Resources**
3. Click **New**
 - Enter the Name as:
 - eventsDefaultThumbnail
 - Select and upload your default Poster file image
 - Optimal image size is 500x410
 - Set Cache Control to *Public*
4. Click **Save**



Static Resource Edit
Save Cancel

Static Resource Information

Name

Description

File No file chosen

Cache Control

Save Cancel

For additional information on customizing and branding events, see: [Events Admin Guide](#).

Step 7 Configure Community Theme

Community Themes supports specific User Interface (UI) styling for Events 6.x.

If you do not already have “Community Themes” configured, see: [How to Configure Community Themes](#).

For the ‘default’ Community Theme record, ensure that the following fields are populated:

- **Header Logo (Static Resource Name)** is the logo that appears on the top left of the Community; used in Applicant Dashboard, Events, and Appointments & Interviews [note: should be used for online app in future release]

Note: This Header Logo relates to the Header Logo URL - as defined on the [Events Custom Settings](#)

- **Header Text Line 1:** Typically your institution’s name
- **Events Custom Setting:** The name of the events custom setting you like associated with this community (or events site).
This *Events Custom Setting* field is newly delivered with Events 6.x. and will need to be added to your Community Theme page layout.

Follow the steps below to add this *Events Custom Setting* field to your Community Theme page layout:

1. Navigate to **Setup > Create > Objects**.
2. Click on the *Community Theme* object.
3. In the *Page Layouts* section, click **Edit** next to the *Community Theme Layout*.



- From the page layout palette, select the *Fields* group and then drag the **Events Custom Setting** field onto the layout.

For an example of a Community Theme record, see the screenshot below:

Community Theme Detail		Edit	Delete	Clone
Theme Name	default			
Template Name	c_TX_CommunitiesTemplate			
Static Resource	TX_NewTheme			
Default	<input checked="" type="checkbox"/>			
▼ For Portal				
Header Logo (Static Resource Name)	UniversityLogo			
Header Text Line 1	TargetX University			
Events Custom Setting	default			

For more information on your Events Custom Settings, please see [Events Custom Settings](#). To further customize the CSS (or Javascript) for Events, please see: [Events Admin Guide - Customizing and Branding Events](#).

Step 8 Add new fields to Organization Events page layout

Several new fields were added to Events 6.x - to control event level features and functionality.

To leverage these new fields, follow the steps below to add these new fields to your Organization Events calendar and page layout.

- Navigate to **Setup > Create > Objects**.
- Click on the *Organization Events* object.
- In the *Field Sets* section, click **Edit** next to *Custom Questions*.
- In the **In the Field Set** box, arrange the 'Field # Required' fields similar to the screenshot below.



In the Field Set ⓘ

Field 1 Label
Field 1 Value
Field 1 Required
Field 2 Label
Field 2 Value
Field 2 Required
Field 3 Label
Field 3 Value
Field 3 Required
Field 4 Label
Field 4 Value
Field 4 Required

5. Click **Save**
6. Click **Edit** next to the *Event Details* field set.
7. From the page layout palette, drag the **Ignore Recommended Events** field into the **In the Field Set** box.
8. Click **Save**

Step 9 Verify your FormAssembly Event Registration Web Form

If you would like to continue using your existing FormAssembly Event Registration web form(s), these event registration web forms will continue to work in Events 6.x.

If you would like to implement a new, updated FormAssembly Event Registration web form for use with Events 6.x, go to [How To Set Redirect for Event Registration In Form Assembly](#) to ensure that the web form redirect is configured properly for event registration:

TargetX provides the following recommended Event Registration web form style changes for Events 6.x:

TargetX recommends modifying your event registration web form in the following ways - for optimal display in Events:

- Capture only the minimum information necessary for any event
- Update your CSS styling to align with Events

See the screenshot below for a recommended Formassembly Event Registration web form for use with Events:



FIRST NAME	LAST NAME *
<input type="text"/>	<input type="text"/>
EMAIL *	CONFIRM EMAIL *
<input type="text"/>	<input type="text"/>
SCHOOL *	
<input type="text"/>	

Click the link below to view and add CSS that will align your existing FormAssembly Event Registration web form for Events:

- [Events Admin Guide: Appendix](#)

To apply this CSS to your FormAssembly Event Registration web form(s), follow the steps below:

1. Access FormAssembly from the **App Picker** on the top right.
2. Click on **Manage Web Forms** tab.

For each event registration web form that your institution uses - where you would like to modify the CSS ...

3. Click **Edit > Edit in Form Builder**
4. Click the **Properties** menu and then select *Custom Code*
5. Using the CSS from the [Events Admin Guide: Appendix](#), replace the entire CSS section of this Custom Code (section delimited by <style> </style>) or update selected style tags within this section.

See also: [Form Assembly FAQ](#).

CAUTION

Before proceeding with Events 6, please note that the following steps will activate and update your student-facing Events experience to the new and mobile-friendly Events 6 user interface. As Events 6 is an entirely mobile-responsive experience, it is highly recommended to not use iframes as they are no longer supported or recommended.

We recommend proceeding in consultation with your institution's website team/personnel as you will also need to update your website or any other assets pointing to event registration (e.g. emails, print materials, social media sites, etc) with updated links. If your institution is currently utilizing iframes with the Events 5.x interface, you will need to unpublish/delete that page and replace the inbound link with the new URL provided below.

If you are not yet ready to switch to the new Events 6 interface, the pre-Summer '16 Events 5 interface is still available within the upgraded package.



Step 10 Change Events Home Site

Note: After completing this step in your Production Org, your new Events site will be active to anyone with the link to your current events site.

1. Navigate to **Setup > Build > Develop > Sites**.
2. Click the **Site Label** related to your Events Site.
3. Click **Edit**.
4. Change the **Active Site Home Page** to 'events'.
5. Click **Save**.

Step 11 Confirm Events Site is now accessible

For your student to access events on your institution's website, follow the steps below:

1. Navigate to **Setup > Build > Develop > Sites**.
2. Click **Site URL** link related to your Events Site.
 - a. You should be directed to the main Events page by appending /targetx_eventsb__events to your Events **Site URL**.
 - b. Examples:
 - i. `https://<<Your Events Site URL>>/events`
 - ii. `https://integration-qa-developer-edition.na30.secure.force.com/events`

Note: Make sure to use your secure Site URL when accessing event.

Step 12 Confirm Upgrade Is Complete

Congratulations! You've successfully completed the install/upgrade of TargetX Email package!

1. Verify Installed Packages lists Events 6.x.
2. Check your published Events links to ensure they look and perform as expected.

To configure this product/feature to your needs, please review: [Events Admin Guide](#) and [Events User Guide](#).

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F. Group Assignment

Included in Summer '16 TargetX Base package is an updated, point and click user experience for creating, deploying, and editing group assignments. See also: [Summer '16 Release Notes](#).

The new Group Assignment module is independent of the old Group Assignment Suite standalone package and can exist in your CRM alongside prior versions until you are ready to begin using the new module.

Once the group is defined, a record owner (referred to as a Group Member) is assigned. Multiple Group Members can be assigned to a group. In the case where there are multiple Group Members, record ownership is assigned in a round robin fashion.

Released Version	TargetX Base 1.77	
Prerequisites	None	
New Objects/ Fields	<u>Objects</u>	<u>New Fields</u>
	Broadcast	Broadcast Type Follow up broadcast Id
	Campaign	EmailTemplate Follow up Open Email EmailTemplate Follow up Un Open Email
	Content Location	Filter
	Rule Action	Label

Note Regarding Group Assignment Access

There are two user access options for Group Assignment that can be defined at the profile level.

1. Managing and/or Creating Assignment Groups

Users responsible for creating, updating, publishing and managing Assignment Groups will need full access (Read and Edit) on all Group Assignment objects and fields, the TargetX Builder tab, as well as access to publish to CRM Objects on which assignments are made.

2. All Other Internal and External Users

All users of the CRM who access records on which ownership is being assigned require Read Only access on all Group Assignment objects and fields. They **do not** require access to the TargetX Builder

Step 1 Confirm TargetX Base Package Was Installed

1. Follow steps in [Base section](#).



Step 2 Create TargetX Builder Tab

Note: TargetX recommends only provisioning access to the TargetX Builder tab and Group Assignments for administrators or power users needing access to build or manage Group Assignments. For users who should not have access to TargetX Builder, select the “Tab Hidden” option for the appropriate profile.

1. Navigate to **Setup > Build > Create > Tabs**.
2. In the **Visualforce Tabs** section, select **New**.

Action	Label	Tab Style	Description
Edit	Appointment Calendar	PDA	
Edit	Email Content	Sailboat	

3. There are three steps to create the new New Visualforce Tab:
 - a. Define a New VisualForce Tab:

New Visualforce Tab

[Help for this Pa](#)

Step 1. Enter the Details
Step 1

Choose the page for this new tab. Fill in other details.

Select an existing page or [create a new page now](#).

Visualforce Page:

Tab Label:

Tab Name:

Tab Style: Wrench

- i. In the **Visualforce Page** picklist, select **XBuilder [TargetX_Base__XBuilder]**.
- ii. Enter the **Tab Label** as **TargetX Builder** (tab name will auto-populate, but can be changed).
- iii. Select any **Tab Style** **Click on magnifying glass, choose any**
- iv. Click **Next**.

- b. Add to Profiles:

- i. In the **Add to Profiles** step, select only the Profiles that will need access to this tab.



Note: If the “Apply one tab visibility to all profiles” radio button is marked, you will not be able to individually set visibility on the profiles.

- ii. Select **Next**.
- c. Uncheck Custom Apps:
 - i. In the **Add to Custom Apps** step, you can uncheck the “Include Tab” box to automatically uncheck all apps, and then re add to apps as desired.

Step 3. Add to Custom Apps
Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform	<input type="checkbox"/>

- ii. Select **Save**.

Step 3 Remove Internal User Access to Group Assignment (Optional)

Upon install of the TargetX Base package, permission to Group Assignment objects and fields are set for all internal users. To limit permissions for internal users requiring Read Only access, you can update the Object Level Permissions on the appropriate profiles.

Update Profile Permissions

1. Navigate to **Setup > Administer > Manage Users > Profiles**
2. Click into the appropriate profile(s) for which you would like to restrict access to Group Assignments.
 - a. Select **Edit** next to the appropriate profile
 - b. In the *Custom Object Permissions* section, set the following to **Read** access only:
 - i. Assignment Groups (v2)
 - ii. Asslgnment Group Members (v2)
 - iii. Expression
 - c. **Click Save**

For details on permissions, see: [Field-Level Security by Product](#).



Step 4 Update Community User Profiles

For customers using Salesforce Communities, you must update profile permissions for the Customer Community User profile assigned to users of your community. This ensures that data submitted by those users can trigger owner assignments.

Update Profile Permissions

2. Navigate to **Setup > Administer > Manage Users > Profiles**
3. Click into your Customer Community user profile assigned to users of your community.
 - a. Select **Edit** next to the profile
 - b. In the *Custom Object Permissions* section, set the following objects to **Read** access only:
 - i. Assignment Groups (v2)
 - ii. Asslgnment Group Members (v2)
 - iii. Expression
 - c. In the *Custom Field-Level Security* section, set **Read** access on all fields for the following objects:
 - i. Assignment Groups (v2)
 - ii. Asslgnment Group Members (v2)
 - iii. Expression

Step 5 Confirm Upgrade Is Complete

Congratulations! You've successfully completed the install of Group Assignments!

1. Verify Installed Packages lists **TargetX Base 1.77**
2. Verify that the **TargetX Builder tab** is present
3. Verify **Profile Permissions** have been updated correctly

To begin using this product/feature, please review: [Group Assignments Admin Guide](#).

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Note: *Upgrading Group Assignment* You can keep the previous version of **Group Assignment** running while you setup new Assignment Groups. Once complete, follow the steps for **Publishing Group Assignments** in the [Group Assignment Admin Guide](#) to move your new groups from one Org to another.



G. Communities (Only Required for Online Application Users)

This version of Communities includes an update for the Online Application to add the school picker to the registration form. See also: [Summer '16 Release Notes](#).

Communities Update Instructions

Communities is an unmanaged package. To access new functionality, you will need to update the `TX_CommunitiesSelfReg` Visualforce Page and the `TX_CommunitiesSelfRegController` Apex Class.

Note: If custom modifications were made to your Online Application registration page or the registration apex controller (by you or by TargetX during implementation), you will need to reapply those changes after making this update.

Step 2 Update the `TX_CommunitiesSelfReg` Visualforce Page

1. Navigate to **Setup > Develop > Visualforce Page**.
2. Locate **`TX_CommunitiesSelfReg`** and select **Edit**.
3. Backup the existing Visualforce code by saving it to a text file stored locally on your machine.
4. Replace the existing code with the code below:

```

<apex:page showHeader="false" standardStyleSheets="false" sidebar="false" expires="0"
cache="false" docType="html" controller="TargetX_Base.TX_CommunitiesBase"
extensions="TX_CommunitiesSelfRegController">
  <style>
    .targetx-application-form-slide label span{
      color:#585e69 !important;
    }
  </style>
<apex:composition template="{!defaultTemplate}">

  <apex:define name="content">

    <apex:form id="theForm" forceSSL="true">
      <ul class="targetx-application-form-slides">
        <li class="targetx-application-form-slide targetx-active">
          <apex:pageMessages id="error"/>
          <h1 class="targetx-application-form-title">Sign Up</h1>
          <label>
            <apex:inputText styleClass="targetx-input-text" required="true" id="firstName"
value="{!firstName}" label="First Name"/>
            <span>First Name</span>
          </label>
          <label>
            <apex:inputText styleClass="targetx-input-text" required="true" id="lastName"
value="{!lastName}" label="Last Name"/>
            <span>Last Name</span>
          </label>
          <!--
          <label>

```



```

        <apex:inputText styleClass="targetx-input-text" required="true" id="communityNickname"
value="{!communityNickname}" label="{!$Label.site.community_nickname}"/>
        <span>Nickname</span>
    </label>
    -->
    <label>
        <apex:inputText styleClass="targetx-input-text" required="true" id="email" value="{!email}"
label="{!$Label.site.email}"/>
        <span>Email Address</span>
    </label>
    <!--
    <label>
        <apex:inputSecret styleClass="targetx-input-text" id="password" value="{!password}"/>
        <span>Password</span>
    </label>
    <label>
        <apex:inputSecret styleClass="form-control style_2" id="confirmPassword"
value="{!confirmPassword}"/>
        <span>Confirm Password</span>
    </label>
    -->

    <!--Uncomment below section to enable school picker-->
    <!--
    <label style="margin-top:60px">
        <c:TX_Autocomplete model="{!accountId}" label="School"></c:TX_Autocomplete>
    </label>
    -->
    <div class="targetx-application-form-slide-buttons">
        <apex:commandLink action="{!registerUser}" styleClass="targetx-button"
value="{!$Label.site.submit}" id="submit"/>
    </div>
    </li>
</ul>
</apex:form>
</apex:define>

</apex:composition>
<script>
    function applyDirty(elem){
        if(elem.val()){
            elem.addClass('targetx-dirty');
        }
    }

    function watch() {
        var elems = $('.'+targetx-input-text');
        elems.change(function () {
            applyDirty($(this));
        });

        elems.each(function() {
            applyDirty($(this));
        })
    }
    watch();
</script>
</apex:page>

```

5. Click **Save**.



Step 3 Update the TX_CommunitiesSelfRegController Apex Class

1. Navigate to **Setup > Develop > Apex Classes**.
2. Locate **TX_CommunitiesSelfRegController** and select **Edit**.
3. Backup the existing Apex Class code by saving it to a text file stored locally on your machine.
4. Replace the existing code with the code below:

```

/**
 * An apex page controller that supports self registration of users in communities that allow self
 registration
 */
public with sharing class TX_CommunitiesSelfRegController {
    public String accountId{get;set;}
    public String firstName {get; set;}
    public String lastName {get; set;}
    public String email {get; set;}
    public String password {get; set {password = value == null ? value : value.trim(); }}
    public String confirmPassword {get; set { confirmPassword = value == null ? value : value.trim(); }}
    public String communityNickname {get; set { communityNickname = value == null ? value :
value.trim(); }}

    public TX_CommunitiesSelfRegController(TargetX_Base.TX_CommunitiesBase controller) {
        accountId = null; // To be filled in by customer. (if school picker is on page this will default the
value)
    }
    public TX_CommunitiesSelfRegController() {}

    private boolean isValidPassword() {
        return password == confirmPassword;
    }

    public PageReference registerUser() {
        SavePoint sp = Database.setSavePoint();

        //Uncomment below to make school picker required
        /*
        if (String.isBlank(accountId)) {
            ApexPages.Message msg = new ApexPages.Message(ApexPages.Severity.ERROR, 'Please
Select A School');
            ApexPages.addMessage(msg);
            return null;
        }
        */

        // it's okay if password is null - we'll send the user a random password in that case
        if (!isValidPassword()) {
            ApexPages.Message msg = new ApexPages.Message(ApexPages.Severity.ERROR,
Label.site.passwords_dont_match);
            ApexPages.addMessage(msg);
            return null;
        }

        String profileId = null; // To be filled in by customer.
        String roleEnum = null; // To be filled in by customer.

        Contact[] cs;
        if(String.isBlank(accountId)){
            cs = [select id, accountId, account.ownerid, account.owner.userRoleId from Contact where email
= :email];
        }
        else{

```



```

        cs = [select id, accountid, account.ownerid, account.owner.userRoleid from Contact where
accountid = :accountid];
    }
    if(cs.size() == 1) {
        if(cs[0].account.owner.userRoleid == null) {
            // Send email or something
        } else {
            accountid = cs[0].accountid;
        }
    }

    if(!hasDuplicateUser(email)){

        String userName = email;

        User u = new User();
        u.Username = userName;
        u.Email = email;
        u.FirstName = firstName;
        u.LastName = lastName;
        u.CommunityNickname = getCommunityNickname();
        u.Profileid = profileid;

        String userId = Site.createPortalUser(u, accountid, password);

        if (userId != null) {
            if (password != null && password.length() > 1) {
                return Site.login(userName, password,
ApexPages.currentPage().getParameters().get('startURL'));
            }
            else {
                PageReference page = System.Page.TX_CommunitiesSelfRegConfirm;
                page.setRedirect(true);
                return page;
            }
        }
        Database.rollback(sp);
        return null;
    }

    private static Boolean hasDuplicateUser(String email){
        Boolean hasDupe = [SELECT Count() FROM User WHERE UserName = :email] > 0;
        if(hasDupe){
            ApexPages.Message msg = new ApexPages.Message(ApexPages.Severity.ERROR,
Label.Duplicate_User_Exists);
            ApexPages.addMessage(msg);
        }
        return hasDupe;
    }

    private string getCommunityNickname() {
        // Perhaps make this query the database at some point
        return (communityNickname == null || communityNickname == '') ? (firstName.substring(0,1) +
lastName + randomNumber()).toLowerCase() : communityNickname;
    }

    private string randomNumber() {
        Integer i1 = Math.abs(Crypto.getRandomInteger());
        Integer i2 = Math.abs(Crypto.getRandomInteger());
        Integer i3 = Math.abs(Crypto.getRandomInteger());
        return (String.valueOf(i1) + String.valueOf(i2) + String.valueOf(i3)).substring(0,3);
    }

```



```
    }
}
```

5. Click **Save**.

Step 3 Create the the TX_Autocomplete Controller

1. Navigate to **Setup > Develop > Apex Classes**.
2. Click **New**.
3. Paste the code below in the Apex Class field:

```
public with sharing class TX_AutocompleteController {
    /*
     *Change these values to modify behaviour
     */
    private static FINAL String SUBJECTNAME = 'Account';
    private static FINAL String LABELFIELD = 'Name';
    private static FINAL String VALUEFIELD = 'Id';
    private static FINAL String WHERECLAUSE = '';
    private static FINAL Integer MAXRECORDS = 100;
    //Query Template (Don't Change)
    private static FINAL String QUERYBASE = 'SELECT {0} FROM {1} WHERE Id != NULL';
    private static FINAL String QUERYTEMPLATE = QUERYBASE + ' AND {2} LIKE {3} {4} LIMIT
'+MAXRECORDS;

    private Object modelVar;

    public void setModelVar(Object modelVar){
        if(this.modelVar != modelVar){
            this.modelVar = modelVar;
        }
    }

    public Object getModelVar(){
        return this.modelVar;
    }

    public String getLabelField(){
        return LABELFIELD;
    }

    public String getValueField(){
        return VALUEFIELD;
    }

    @RemoteAction
    public static List<sObject> getRecordByValueField(String v){
        return Database.query(prepareQuery(QUERYBASE,null)+' AND '+VALUEFIELD+'='+'v+' LIMIT 1');
    }

    @RemoteAction
    public static List<sObject> getData(String term){
        return Database.query(prepareQuery(QUERYTEMPLATE,term));
    }

    private static String prepareQuery(String tmp1,String term){
        Set<String> fields = new Set<String>{
            LABELFIELD.toLowerCase(),
            VALUEFIELD.toLowerCase()
        };
    }
}
```




```

return String.format(tmpl,new List<String>{
    String.join(new List<String>(fields),','),
    SUBJECTNAME,
    LABELFIELD,
    '\''+term+'\'' ,
    String.isBlank(WHERECLAUSE) ? '' : ' AND '+WHERECLAUSE
});
}
}

```

4. Click **Save**.

Step 4 Create the the TX_AutocompleteControllerTests Apex Class

1. Navigate to **Setup > Develop > Apex Classes**.
2. Click **New**.
3. Paste the code below in the Apex Class field:

```

@isTest
private class TX_AutocompleteControllerTests {
    static testMethod void shouldInit(){
        TX_AutocompleteController con = new TX_AutocompleteController();
        System.assert(true);
        con.setModelVar("");
        System.assert(con.getModelVar() == "");
        System.assert(con.getLabelField() != NULL);
        System.assert(con.getValueField() != NULL);
        System.assert(TX_AutocompleteController.getRecordByValueField("") != NULL);
        System.assert(TX_AutocompleteController.getData('A') != NULL);
    }
}

```

4. Click **Save**.

Step 5 Create the TX_Autocomplete Visualforce Component

1. Navigate to **Setup > Develop > Visualforce Components**.
2. Click **New**.
3. Add label "TX_Autocomplete". Name will automatically update to "TX_Autocomplete".
4. Locate **TX_Autocomplete** and select **Edit**.
5. Backup the existing Apex Class code by saving it to a text file stored locally on your machine.
6. Paste the code below in the Visualforce markup field:

```

<apex:component controller="TX_AutocompleteController">
    <apex:attribute name="model" access="public" description="model" type="Object"
    assignTo="{!modelVar}"></apex:attribute>
    <apex:attribute name="label" access="public" description="field label"
    type="String"></apex:attribute>
    <apex:attribute name="default" access="public" description="Id of the default record"
    type="String"></apex:attribute>

    <link href="https://cdnjs.cloudflare.com/ajax/libs/angular-ui-select/0.17.1/select.min.css"
    rel="stylesheet" />
    <script src="https://cdnjs.cloudflare.com/ajax/libs/jquery/2.2.3/jquery.js"></script>
    <script src="https://cdnjs.cloudflare.com/ajax/libs/angular.js/1.5.5/angular.min.js"></script>

```



```

<script src="https://cdnjs.cloudflare.com/ajax/libs/angular-ui-select/0.17.1/select.min.js"></script>
<script src="https://cdnjs.cloudflare.com/ajax/libs/angular.js/1.5.5/angular.min.js"></script>
<script src="{!$Resource.TX_NewTheme}/js/tx_autocomplete/app/widgets/widgets.module.js"/>
<script
src="{!$Resource.TX_NewTheme}/js/tx_autocomplete/app/widgets/autocomplete/autocomplete.directive.js"/>
<script
src="{!$Resource.TX_NewTheme}/js/tx_autocomplete/app/widgets/autocomplete/ui-select-infinity.directive.js"/>

<script type="text/javascript">
  TX = {
    getData : '{!$RemoteAction.TX_AutocompleteController.getData}',
    getRecordByValueField :
'{$RemoteAction.TX_AutocompleteController.getRecordByValueField}',
    staticPath: '{!$Resource.TX_NewTheme}'
  }

  var app = angular.module('app',['widgets']);
  app.controller('ctrl',ctrlFn);
  function ctrlFn($scope) {
    $scope.model = '{!model}';
  }
</script>
<style media="screen">
  .ui-select-bootstrap .ui-select-choices-row.active>a {
    color: #fff;
    text-decoration: none;
    background-color: #D9E0E6;
  }

  .ui-select-bootstrap .ui-select-choices-row>a {
    display: block;
    padding: 8px 20px;
    clear: both;
    font-weight: 400;
    line-height: 1.42857143;
    color: #333;
    white-space: nowrap;
    height: 34px;
    text-indent: 8px;
  }

  .ui-select-bootstrap>.ui-select-match>.btn {
    bottom: -2px;
  }

  .ui-select-match > .ui-select-toggle > span.ui-select-placeholder, .ui-select-match >
.ui-select-toggle > span.ui-select-match-text{
    bottom: -4px;
    left : 4px;
  }

  input.tx-auto-hidden{
    display: none !important;
  }

  .ui-select-choices-row > .ui-select-choices-row-inner > span{
    position: relative;
  }

  .ui-select-search{

```



```
        width: 100% !important;
    }
</style>
<div ng-app="app" ng-controller="ctrl">
    <autocomplete ng-model="model" label-field="{!labelField}" value-field="{!valueField}"
label="{!label}" default="{!default}"></autocomplete>
    <apex:inputText value="{!model}" styleClass="tx-auto-hidden"
html-ng-model="model"></apex:inputText>
</div>
</apex:component>
```

7. Click **Save**.

Step 6 Update TX_NewTheme Static Resource

1. Download the [TX_NewTheme.zip](#) file locally to your computer.
2. Navigate to **Setup > Develop > Static Resources**.
3. Locate *TX_NewTheme* and click **Edit** (if there are two, choose the one with no value in the *Namespace Prefix* field).
4. Select **Choose File**.
5. Upload the **TX_NewTheme.zip** file downloaded in step 1.
6. Click **Save**.

Step 7 Confirm Update Is Complete

To confirm you have updated your Registration page correctly:

1. Follow the instructions in the [Online Application](#) section of this guide to enable the school picker on your registration form.
2. Navigate to your Online Application, select **Sign-up**.
3. Confirm the school picker appears on the form.
4. Enter your name, email address, select a school from the school picker, and click the button to register.
5. Confirm the Account for the Contact created during registration in step 4 has been updated to the school chosen during registration.

To add the school picker to the registration form, see the [Online Application](#) section of this guide.

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H. Online Application

Administrators now have the ability to configure **Application Fee Discounts** to reduce or waive the application fee, allow applicants to update their response to the key questions, and view a snapshot of a submitted TargetX online application. See also: [Summer '16 Release Notes](#).

Released Version	TargetX Online Application 1.56	
Prerequisites	TargetX Base package 1.77 TargetX Recruitment Manager 2.79 TargetX Payment Connector 1.52 Communities Update (optional)	
New Objects/ Fields	Objects	New Fields
	App Configuration	Allow Change Key Questions
	Application	Application Fee Discount
	Application Form	Allow Change Key Questions

Step 1 Install TargetX Online Application Package

1. To obtain package links and passwords, please see the [Online Application Chatter Group](#).
2. Choose ALL USERS. If additional security is required, please update the appropriate Profiles.

Step 2 Update Application Page Layout

9. Navigate to **Setup > Create > Objects**.
10. Click on the *Application* object.
11. In the *Page Layouts* section, select to **Edit** the *Application Layout*.
12. From the page layout palette, select the *Buttons* group and then drag the **View Submitted App** button onto the layout.

Note: This is ONLY needed if you are using [View Submitted App](#) functionality. A snapshot of application data is saved at point of submission. Admins can select the View Submitted App button on the application to view a print preview of a submitted application. If the application has not been submitted, you will receive an error. The preview does not include attachments. This functionality is for Online Applications ONLY. This will only work for applications submitted after this upgrade.

13. From the page layout palette, select the *Fields* group and then drag the **Application Fee Discount** field onto the layout.

Note: This is ONLY needed if you are using **Application Fee Discount** functionality.



14. **Save** your changes.

Step 3 Update App Configuration Page Layout

1. Navigate to **Setup > Create > Objects**.
2. Click on the *App Configuration* object.
3. In the *Page Layouts* section, select to **Edit** the *App Configuration Layout*.
4. From the page layout palette, select the *Fields* group and then drag the **Allow Change Key Questions** field onto the layout.
5. **Save**.

Step 4 Update Application Form Page Layout

6. Navigate to **Setup > Create > Objects**.
7. Click on the *Application Form* object.
8. In the *Page Layouts* section, select to **Edit** the *Application Form Layout*.
9. From the page layout palette, select the *Fields* group and then drag the **Allow Change Key Questions** field onto the layout.
10. **Save**.

Step 5 User Profile Permissions

1. Update the **Customer Community User** profile used by Applicants to access the Online Application Community to include the following permissions:

Objects: App Configuration, Application Form		
Read		
Fieldname	Read Access	Edit Access
Allow Change Key Questions	✓	

Object: Application		
Read/Edit		
Fieldname	Read Access	Edit Access
Application Fee Discount	✓	✓

2. Update the profile for **Administrative** users to view the snapshot of a submitted application requires the following permissions:
 - a. Enable access to the **Visualforce page TargetX_App.ApplicationPrintView**.



Step 6 Enable the School Picker on the Community Registration Page (OPTIONAL)

You can choose to include the **School Picker** on the **Self Registration** page so that you can assign a staff member and start communicating with applicants as soon as they sign up. By default, the **Registration** page will NOT include the **School Picker** but you can enable the **School Picker** using the following steps:

Enable School Picker on Registration Page

1. Navigate to **Setup > Develop > Visualforce Page**.
2. Locate **TX_CommunitiesSelfReg** and select **Edit**.
3. Search for the following section:

```
<!--Uncomment below section to enable school picker-->
<!--
<label style="margin-top:60px">
  <c:TX_Autocomplete model="{!accountId}" label="School"></c:TX_Autocomplete>
</label>
-->
```

4. Remove the <!-- and --> symbols.
5. It should look similar to this

```
<!--Uncomment below section to enable school picker-->

<label style="margin-top:60px">
  <c:TX_Autocomplete model="{!accountId}" label="School"></c:TX_Autocomplete>
</label>
```

6. Set the **label** that will display to the user:
 - a. Replace **School** with your preferred text:
 - i. **label="School"**
7. **Save** your changes.

Set School Picker on Registration Page as Required

1. Navigate to **Setup > Develop > Apex Classes**.
2. Locate **TX_CommunitiesSelfRegController** and select **Edit**.
3. Search for the following section:

```
//Uncomment below to make school picker required
/*
if (String.isBlank(accountId)) {
  ApexPages.Message msg = new ApexPages.Message(ApexPages.Severity.ERROR, 'Please Select A School');
  ApexPages.addMessage(msg);
  return null;
}
*/
```

4. Remove the /* and */ symbols.



5. It should look similar to this.

```
//Uncomment below to make school picker required  
  
if (String.isBlank(accountId)) {  
    ApexPages.Message msg = new ApexPages.Message(ApexPages.Severity.ERROR, 'Please Select A School');  
    ApexPages.addMessage(msg);  
    return null;  
}
```

6. Click **Save**.

Step 7 Confirm that the App Configuration has key question values set.

For information on setting up Key Questions, see: How to Setup Key Questions in the [Online Application Admin Guide](#).

Step 8 Confirm Upgrade Is Complete (Optional)

1. To confirm the **Application Fee Discount** enhancement:
 - a. Select a test application for one of your Online Application Application Forms.
 - i. The test application must be tied to a Contact for which you have a username and password to log in to the Online Application Community.
 - ii. The Application Form must have an application fee configured.
 - b. Navigate to the test application record and enter a value into the “Application Fee Discount” field.
 - c. Navigate to the Online Application Community and log in as the user for the test application.
 - d. Select the application updated in step b.
 - e. Click “REVIEW YOUR APPLICATION”.
 - i. The discount will display on the review page.
 - ii. The new amount due will display on the review page.
 - f. Click “SAVE & PAY” and follow the steps to navigate to the payment processor.
 - g. Confirm that the amount sent to the payment processor is the new amount due.
2. To confirm the **View Submitted App** enhancement:
 - a. Submit a test application in your sandbox.
 - b. Navigate to the application record of the submitted test application.
 - c. Click the **View Submitted App** button and confirm you are able to view a snapshot of the submitted application.
3. To confirm the **Update Response to the Key Questions** enhancement:
 - a. Navigate to the Application Form you want to test.
 - b. Click the checkbox Allow Change Key Questions.
 - c. Navigate to the App Configuration for the Application Form chosen in step a.
 - d. Click the checkbox Allow Change Key Questions.
 - e. Log in to the Online Application Community with a test user that has an application for the Application Form from step a.
 - f. Navigate to the Application Form from step a.
 - g. Select the left navigation menu and confirm the “Update Application Type” button appears.
 - h. Select the button and navigate through to update the responses to the key questions.



- i. Navigate to the Application record of the test user and confirm the Application Process has been updated to the Application Form associated with the new responses to the Key Questions.

To configure this product/feature to your needs, please review: [Online Application Admin Guide - Fee Waivers and Discounts](#) and [Online Application Community Configuration Guide](#).

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I. TargetX Decision

TargetX Decision module has now been improved to enable application PDF caching for significantly faster load times within the TargetX Decision reader. Reviewers can also navigate between applications from within the reader without having to navigate back to the Application Review list view. See also: [Summer '16 Release Notes](#).

Released Version	TargetX Decision 1.72	
Prerequisites	TargetX Base package 1.77 TargetX Recruitment Manager 2.79	
New Objects/ Fields	Objects	New Fields
	Application Review Cache (NEW)	Application Review
	Application Review Type	Cache Enabled
	Application Review	Disable Cache

Note: For Decision 1.72 you MUST first upgrade to the Spring '16 version (1.49) if you haven't already. Follow these steps: [How to Upgrade Decision Module](#), before proceeding further.

Step 1 Install TargetX Decision Package

- To obtain package links and passwords, please see the [TargetX Decision Chatter Group](#).
- Choose ALL USERS. If additional security is required, please update the appropriate Profiles.

Step 2 Update User Profile Permissions


- Update the permissions for any profile that includes users who will be reviewing applications using Decision :

Object: Application Review Cache		
Read		
Fieldname	Read Access	Edit Access
ALL FIELDS	✓	

For more information on permissions, see: [Field-Level Security by Product](#).



Step 3 Add Access to Cache Admin Page (OPTIONAL)

The **CacheAdmin Visualforce** page allows a user to create *Application Review* caches on demand and to start the scheduled hourly cache. The page can be accessed via **Setup > Develop > Visualforce pages > CacheAdmin** (click ).

The steps below provide alternative options for accessing the Cache Admin page:

1. To add the **Cache Admin** page as a custom link, see [Define Custom Buttons and Links](#).
A 'custom link' will appear on the left navigation, enabling easier access to the Cache Admin page.
 - a. Navigate to **Setup > Customize > Home > Custom Links**
 - b. Select **New**.
 - c. Enter the following information:
 - i. **Label** - such as *Cache Admin*.
 - ii. **Display Type** - select *Detail Page Link*.
 - iii. **Behavior** - *Display in New Window*.
 - iv. **Content Source** - *Visualforce page*, then choose **CacheAdmin** from the picklist.
 - d. **Save** your changes.
2. To add the *Cache Admin* page as a new tab, see also [Create Visualforce Tabs](#).
 - a. Navigate to **Setup > Create > Tabs**.
 - b. In the *Visualforce Tabs* section, select **New**.
 - c. In the Visualforce page picklist, choose **CacheAdmin [TargetX_Reader_CacheAdmin]**.
 - d. Enter a **Label, Name** and select a **Tab Style**.
 - e. Select **Next**.
 - f. Indicate the **Profiles** that will have access to the tab.
 - g. Select **Next**.
 - h. Indicate any **Custom Apps** that will display the tab.
 - i. Select **Save**.

Step 4 Add related list Application Review Cache to Application Review layout (OPTIONAL)

1. To view an existing cache and cache created date, an admin can add the Application Review Cache related list to the Application Review layout. See also: [Customize Related List](#).

Step 5 Update your 'Application Review Type' records

1. Navigate to the **Application Review Type**.
2. Select the **Basic Configuration Editor** button.
3. For each Document you have available, select the action icon and then **Edit**.
4. For any Visualforce pages, you must reselect the **Page** and **Custom CSS**.
5. **Save** your changes.



6. For any documents that are Essays, Recommendations, Extracurricular and Enrollment Histories you will need to reassign the Order and Filter values as the upgrade will not keep the order and filter values from your previous configuration.
7. **Save** your changes.

Step 6 Confirm Upgrade Is Complete (OPTIONAL)

1. To confirm the **PDF Cache** enhancement in a sandbox:
 - a. Enable caching for a test Application Review Type by checking the **Cache Enabled** checkbox.
 - i. Choose an Application Review Type for which there exists at least one Application Review record to test.
 - b. Navigate to the CacheAdmin page using the Tab or Custom Link you created in Step 3.
 - c. Click the “Start Batch” button.
 - d. Navigate to an Application Review record for the test Application Review Type.
 - e. Confirm that the Application Review Cache related list includes a record.
 - f. Click the Application Review Cache record.
 - g. Confirm that a cache file “cache.json” attachment is included.

Note: Depending on the number of records and size and number of attachments, it may take a few minutes for the cache to be created.

2. To confirm the **Navigate Between Applications** enhancement:
 - a. Navigate to the Application Review list view.
 - b. Select multiple applications by clicking the checkboxes next to the Application Reviews.
 - c. Click the “Read Application(s)” button.
 - d. Confirm that you are able to navigate between the applications within the reader from the picklist in the reader header.

To configure this product/feature to your needs, please review: [TargetX Decision Admin Guide](#).

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J. Applicant Dashboard

Previously known as the static Portal page, the newly enhanced **Applicant Dashboard** provides a single page for all applicants, including those applying outside of the TargetX Application, to access application information. See also: [Summer '16 Release Notes](#).

Released Version	TargetX Applicant Dashboard 1.16	
Prerequisites	TargetX Base 1.77 TargetX Payment Connector 1.52 TargetX Recruitment Manager 2.79 and higher NOT using the Application Requirements Manager 'stand-alone' version. TargetX Events 6.1 (Recommended) Communities 1.8 or higher (Recommended)	
New Objects/ Fields	<u>Objects</u>	<u>New Fields</u>
	None	None

Step 1 Install Applicant Dashboard Package

- To obtain package links and passwords, please see either the [Online Application Chatter Group](#) or [CRM Community Chatter Feed](#).
- Choose ALL USERS. If additional security is required, please update the appropriate Profiles.

Step 2 Update User Profile Permissions

- Community Users** viewing the student-facing portal will need the following permissions:

Object: Application		
Read		
Fieldname	Read Access	Edit Access
Portal Application Label	✓	

Object: Community Theme		
Read		
Fieldname	Read Access	Edit Access
Applicant Dashboard Events URL	✓	

TargetX Recruitment Manager 2.79 includes the addition of a new field (*Portal Application Label*) to support Applicant Dashboard 1.15. This field allows Administrators to provide a unique label for all applications that



display on the Applicant Dashboard. You will need to update your *Application Page Layout*.

Step 3 Add Portal Application Label Field to Application Layout

1. Navigate to **Setup > Create > Objects**.
2. Click on the *Application* object.
3. In the *Page Layouts* section, select to **Edit** the *Application Layout*.
4. From the page layout palette, select the *Fields* group and then drag the **Portal Application Label** onto the layout.
5. **Save** your changes.

Step 4 Add Applicant Dashboard Events URL Field to Community Theme Layout

1. Navigate to **Setup > Create > Objects**.
2. Click on the *Community Theme* object.
3. In the *Page Layouts* section, select to **Edit** the appropriate layout.
4. From the page layout palette, select the *Fields* group and then drag the **Applicant Dashboard Events URL** onto the layout.

Step 5 Configure Events Permissions

1. If you are using Events, you will need to add the appropriate Object and Field Level permissions for the **Community User** profile. For more information on permissions, see: [Field-Level Security by Product](#), *Events Registration* tab.

Step 6 Confirm Upgrade Is Complete (OPTIONAL)

1. To confirm the Applicant Dashboard is available for an external application:
 - a. Select a test external application (i.e., not from the TargetX online application).
 - b. Log in to the Applicant Dashboard Community as the Contact for this application.
 - c. Confirm that the external application appears within the Applicant Dashboard.
2. To confirm the Application Label enhancement:
 - a. Select a test Application record.
 - b. Update the **Portal Application Label** with a label.
 - c. Log in to the Applicant Dashboard Community as the Contact for this application.
 - d. Confirm the application label displays.
3. To confirm the Events Link enhancement:
 - a. Navigate to the Community Theme record for your Applicant Dashboard Community.
 - b. Update the **Applicant Dashboard Events URL** with a valid URL.
 - c. Log in to the Applicant Dashboard Community.
 - d. Click the “Go To...” dropdown and select “Events”.
 - e. Confirm the URL that loads in a new tab is the URL you added in step 3b.

To configure this product/feature to your needs, please review: [Applicant Dashboard Admin Guide](#).

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