Spyrosoft Enhanced Related List User Guide

1. Overview

Spyrosoft Enhanced Related List is a Salesforce managed package that gives users a more flexible way to work with related records and object-based lists on Lightning pages. It extends the standard Salesforce experience with extra options for viewing, filtering, sorting, editing, formatting, and exporting data.

The package includes two Lightning components:

- **Sweet Related List**: displays related records for the current record, such as an Account's Contacts or Opportunities. This component is used on **Record Pages**.
- **Sweet Object List View**: displays records from a selected object based on the configured criteria. This component can also be added in **App Builder** and configured directly on the page.

Compared with the standard Salesforce related list, these components provide a more advanced and user-friendly way to work with data. Depending on configuration and permissions, users can search records, apply filters, sort by multiple fields, edit values inline, update several records at once, export results, use conditional formatting, and display image previews from URL fields.

This guide explains how to install the package, assign access, place the components on Lightning pages, configure them, and use their main features in daily work.

Why use Spyrosoft Enhanced Related List

Standard Salesforce related lists are useful for basic record access, but they offer limited flexibility when teams need to review, update, and manage larger sets of related data. Spyrosoft Enhanced Related List adds a richer toolbar and more control over how records are displayed and maintained. This helps users work faster and reduces the number of clicks needed for common actions. The updated interface also supports features such as mass update, advanced filtering, export to file, and image previews directly in the list.

2. Installation

Install or upgrade the Spyrosoft Enhanced Related List managed package using the package installation link provided by your team or available on the AppExchange listing. Use the link that matches your Salesforce environment:

- Sandbox: https://test.salesforce.com/packaging/installPackage.apexp?p0=04tQB000000U2fVYAS
- Production: https://login.salesforce.com/packaging/installPackage.apexp?p0=04tQB000000U2fVYAS

During installation, Salesforce will ask you to choose which users should receive access to the package. Select the option that best matches how you want to manage permissions in your org.

Choose the right access level

You can install the package for:

- **All Users**
- **Admins Only**
- **Specific Profiles**

The selected option affects who can access the components after installation and who can manage their configuration.

In most cases, **Admins Only** or **Specific Profiles** is the safer choice during initial setup. This gives administrators time to test the package, review access, and assign permissions in a controlled way.

If you choose **Install for All Users**, users may automatically receive access to the component. You should then review permissions and remove configuration access from users who should not be allowed to change list settings.

Recommended approach

For most implementations, the recommended approach is:

1. Install the package for **Admins Only** or **Specific Profiles**.
2. Test the components in a sandbox or selected environment.
3. Assign the required permission sets to the right users.
4. Add the components to Lightning pages and complete configuration.

This approach helps reduce the risk of giving edit access too broadly before setup is complete.

Important note

After installation, users still need the correct permission sets to work with the package properly. Installation alone may not be enough to let users open or configure the component. Permission assignment is covered in the next section.

3. Assigning Permissions for Users

The Spyrosoft Enhanced Related List managed package includes two permission sets. These permission sets control who can use the component and who can change its configuration.

Related List User

Assign **Related List User** to anyone who needs to view and work with Sweet Related List or Sweet Object List View on a Lightning page. This permission set gives users access to the standard functionality of the component.

Users without this permission set may see an error when opening the component and will not be able to use it correctly.

Related List Editor

Assign **Related List Editor** only to users who should be able to configure the component. In addition to standard user access, this permission set allows users to open the configurator and save changes to the shared configuration. These changes can affect how the component is displayed for other users who use the same configuration name.

This permission should usually be limited to administrators, power users, or selected business users responsible for maintaining list setup.

Recommended permission model

In most cases, it is best to separate users into two groups:

- **Regular users**: assign **Related List User**
- **Administrators or editors**: assign **Related List Editor** and, where needed, **Related List User** as part of the setup model used in your org

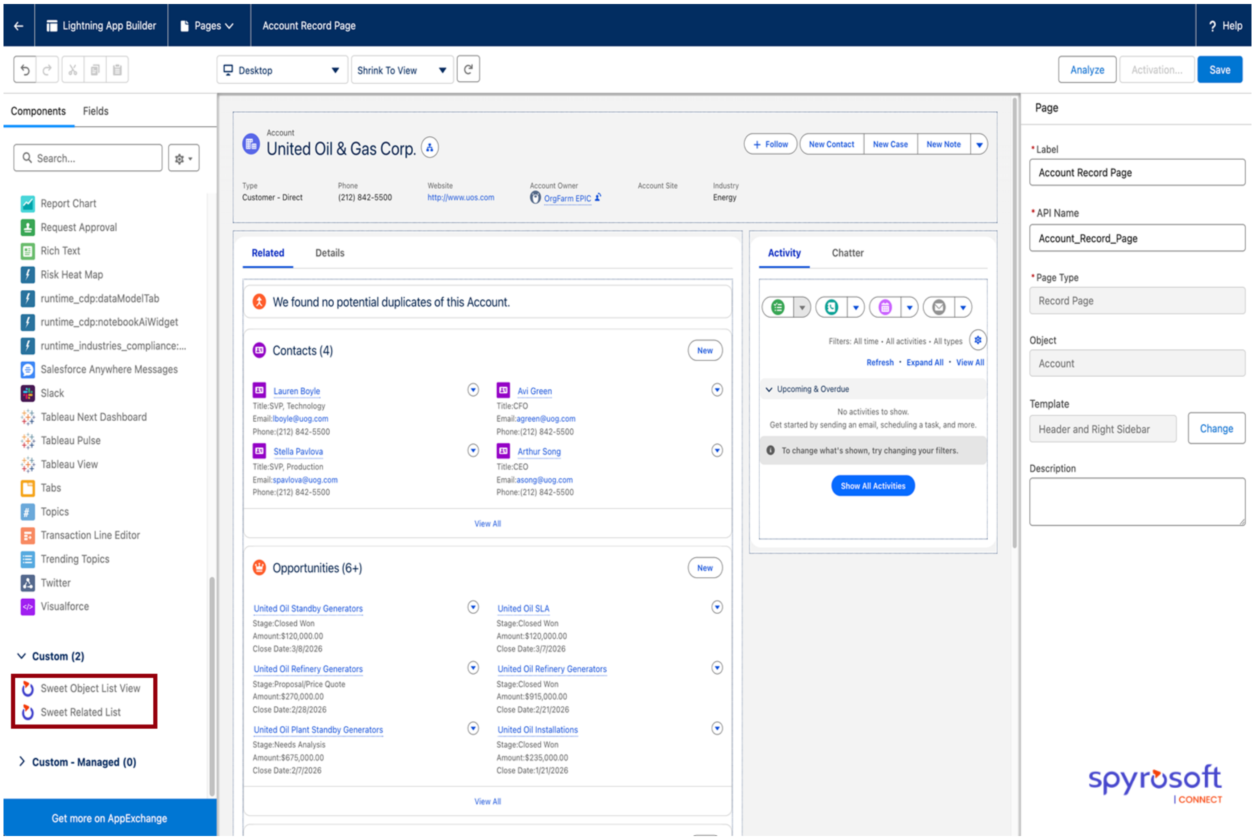
This helps prevent accidental configuration changes while still allowing end users to work with the list.

4. Setting Up Spyrosoft - Enhanced Related List Components

The **Spyrosoft - Enhanced Related List** app includes two Lightning components that can be added to Salesforce Lightning pages:

- **Sweet Related List**
- **Sweet Object List View**

These components extend the standard Salesforce experience and give users more control over how records are displayed, filtered, sorted, edited, and exported.



Sweet Related List

Sweet Related List displays records related to the current record. For example, on an Account page, it can show related Contacts, Opportunities, Cases, or other related records. This component is intended for **Record Pages**.

Use this component when you want to improve how users work with related records directly from a record page.

Sweet Object List View

Sweet Object List View displays records from a selected object based on the configured setup. Unlike Sweet Related List, it is not limited to records related to the current page record. It can be used to display records from standard or custom objects, depending on the selected configuration.

Use this component when you want to place a flexible object-based list on a Lightning page.

Where to find the components

In **Lightning App Builder**, both components are available in the **Custom** section. From there, an administrator can drag the selected component onto the page and configure it using the panel on the right.

When to use each component

Choose **Sweet Related List** when:

- you want to display records related to the current record,
- you are working on a Salesforce Record Page,
- you want to replace or improve a standard related list.

Choose **Sweet Object List View** when:

- you want to display records from a specific object,
- you need a configurable list that is not tied to one related list,
- you want more flexibility in deciding which records should be shown on the page.

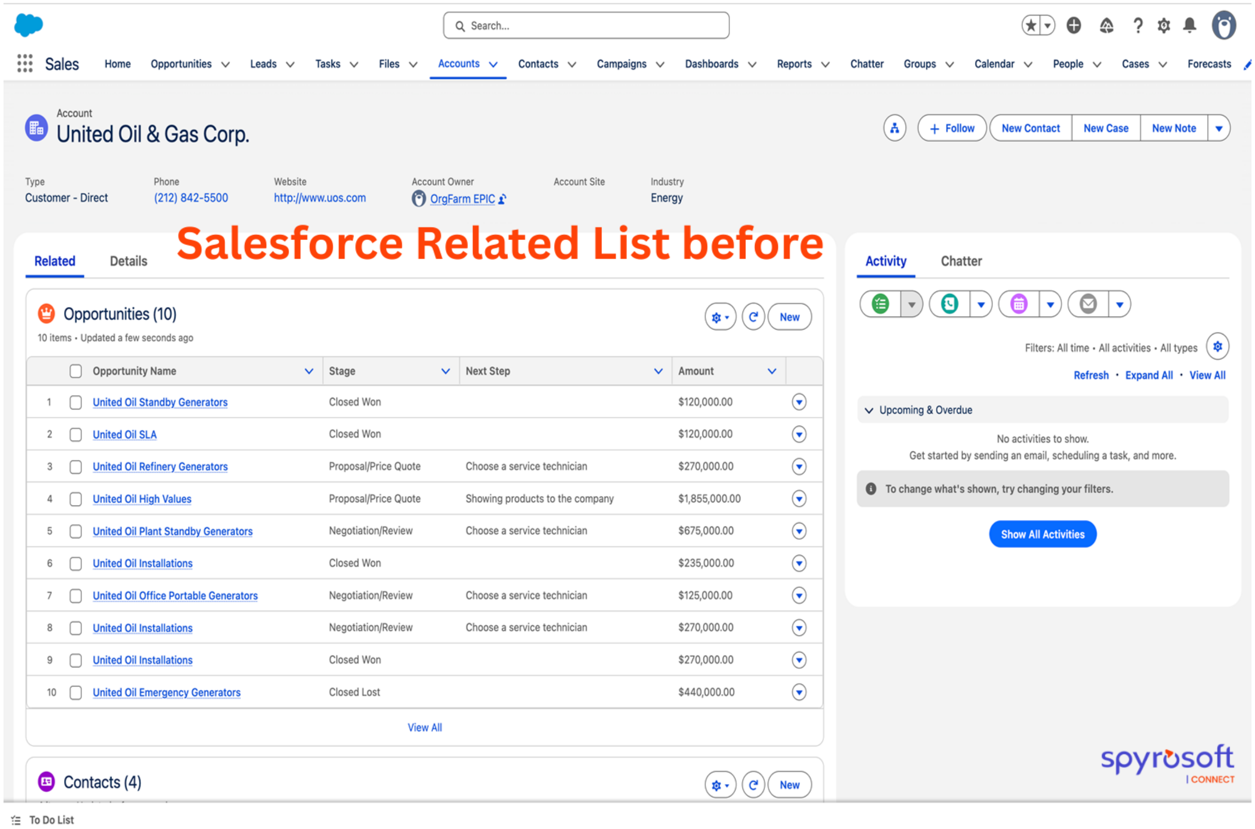
Before you start

Before adding either component to a page, make sure that:

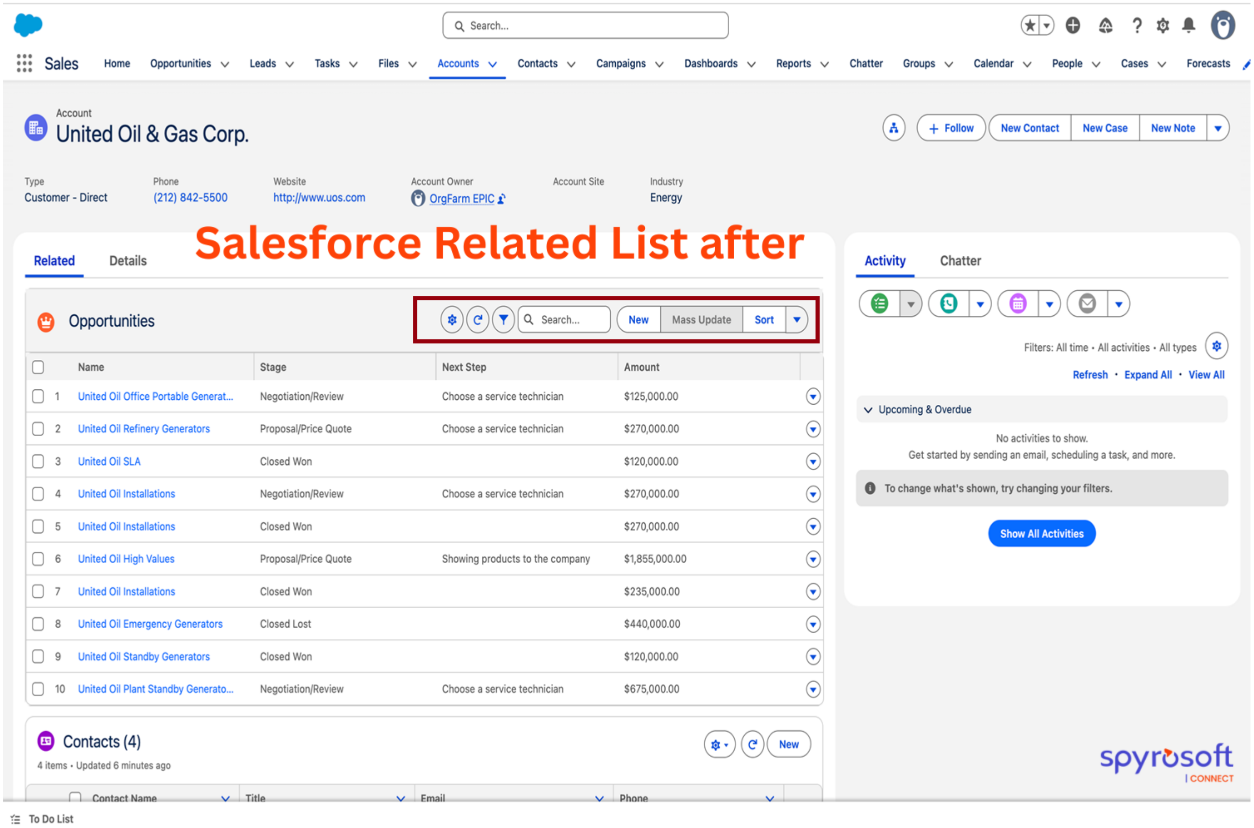
- **Spyrosoft - Enhanced Related List** is installed,
- the correct permission sets are assigned,
- you know which records or object data you want to display,
- you are editing the correct Lightning page.

This will make the setup easier and help avoid issues during configuration.

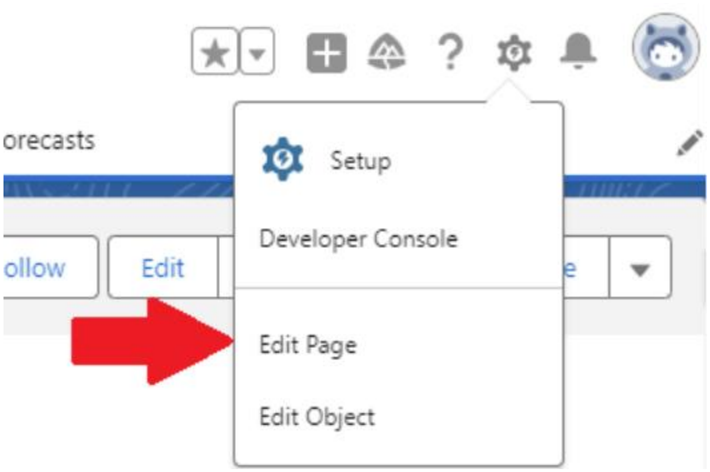
5. Sweet Related List Setup



Use **Sweet Related List** when you want to display and manage records related to the current record, such as Contacts on an Account or Opportunities on a related page. This component is added to a **Record Page** in Salesforce Lightning App Builder.



Add the component to the page



1. Open the record page where you want to place the component.
2. Click the **gear icon** in the top-right corner.
3. Select **Edit Page**.
4. In **Lightning App Builder**, use the search box to find **Sweet Related List** in the **Custom** section.
5. Drag the component to the desired area on the page.

After you add the component, its properties will appear in the panel on the right. This is where you define the basic setup for the list.

Configure the required properties

To make the component work correctly, complete the required fields in the right-side panel.

List Name

Enter the title that will appear above the list. Use a clear name that helps users understand what the list shows, for example **Open Cases**, **Related Contacts**, or **Active Opportunities**.

Related List

Select the related list you want to display. This defines which related records will appear in the component for the current record.

Number of Records to Display

Set how many records should be shown when the component first loads. The default value is **10**.

Choose a smaller number if you want a cleaner page layout, or a larger number if users often need to review more records without paging.

Config Name

Enter the configuration name used by this component. This name connects the component to its saved settings, such as selected columns, filters, sorting, and formatting rules. For example, you might use names like **Open Cases**, **Priority Contacts**, or **Recent Opportunities**.

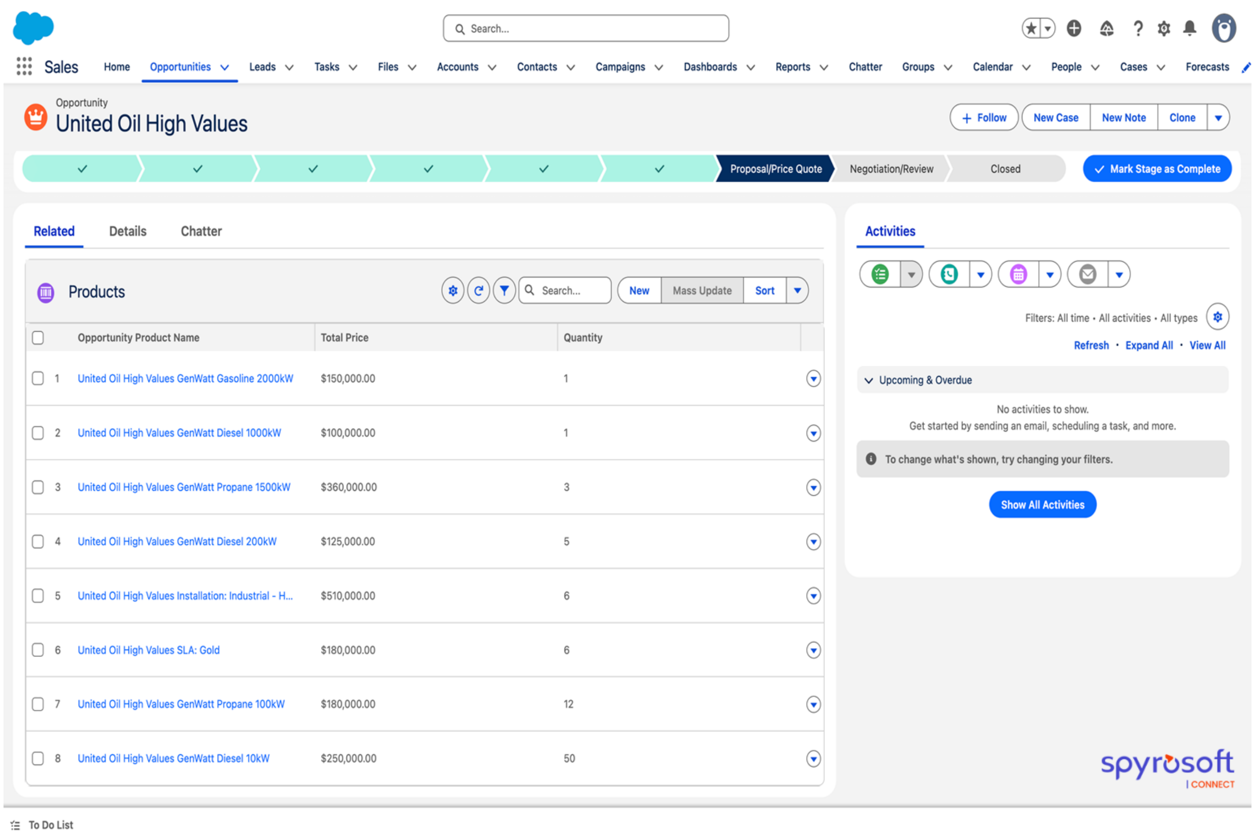
Users with the appropriate editor permission can update the shared configuration linked to this name. If the same configuration name is used in more than one place, the saved settings can apply across those component instances.

What happens after setup

Once all required values are entered, the component reloads in the page preview and displays the related records.

For a new configuration name, the preview may initially show only the **Id** column until the configuration is updated. If you use an existing configuration name, the preview can show the previously saved setup right away.

6. Sweet Object List View Setup



Use **Sweet Object List View** when you want to display records from a selected object on a Lightning page. Unlike **Sweet Related List**, this component is not limited to records related to the current record. It can be used to show records from standard or custom objects based on the selected configuration.

Add the component to the page

1. Open the Lightning page where you want to place the component.
2. Click the **gear icon** in the top-right corner.

3. Select **Edit Page**.
4. In **Lightning App Builder**, use the search box to find **Sweet Object List View** in the **Custom** section.
5. Drag the component to the desired location on the page.

After the component is added, its properties appear in the panel on the right. This is where you define the basic setup for the list.

Configure the required properties

To make the component work correctly, complete the required fields in the right-side panel.

List Name
Enter the title that should appear above the list. Use a clear name that helps users understand what the list shows, such as **Open Cases**, **Active Opportunities**, or **Recent Requests**.

Object
Select the object you want to display. This can be a standard or custom object available in your Salesforce org. The selected object defines which records will be available in the list.

Number of Records to Display
Choose how many records should be shown when the component first loads. The default value is **10**.

Use a smaller number if you want a more compact layout. Use a larger number if users usually review more records at once.

Config Name
Enter the configuration name for the component. This name connects the component to its saved settings, such as selected columns, filters, sorting, and formatting rules. Examples include **Open Cases**, **High Priority Opportunities**, or **Recent Orders**.

Users with the appropriate editor permission can update the shared configuration linked to this name. If the same configuration name is used in multiple places, the saved settings can apply across those component instances.

How this setup differs from Sweet Related List

The setup process is very similar to **Sweet Related List**, but there is one important difference:

- in **Sweet Related List**, you select a **Related List**
- in **Sweet Object List View**, you select an **Object**

This means **Sweet Object List View** is used for object-based lists, while **Sweet Related List** is used for records related to the current record.

What happens after setup

After all required values are entered, the component reloads in the page preview and displays the first set of matching records.

If you use a new configuration name, the preview may initially show only the **Id** column until the configuration is updated. If you use an existing configuration name, the preview may already display the saved setup.

7. Related List Configuration

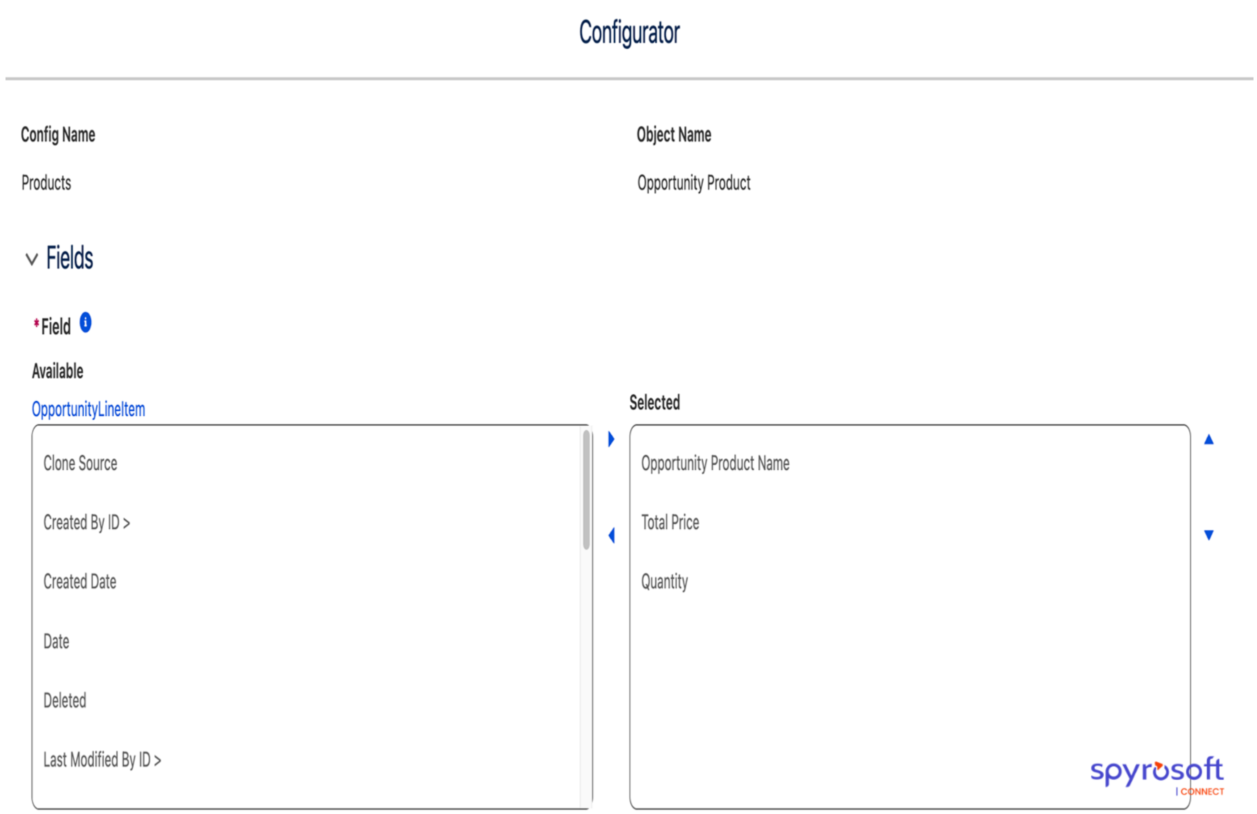
Once **Spyrosoft - Enhanced Related List** has been added to the page, users with the **Related List Editor** permission set can configure how the component works and how records are displayed. These settings control the shared configuration connected to the selected **Config Name**.

This configuration applies to both **Sweet Related List** and **Sweet Object List View**. Depending on the component, the configuration is linked either to a related list or to an object.

Open the configurator

To open the configurator on desktop:

1. Go to the page where the component is placed.
2. Find the component you want to configure.
3. Click the **gear icon** in the component header.



If you do not see the gear icon, make sure your user has the **Related List Editor** permission set assigned.

After clicking the icon, a configuration window opens. At the top, you can see:

- the **configuration name** you are editing,
- the **object** used by that configuration.

After making changes, click **Save** in the bottom-right corner to apply them. If there are any errors, the affected section is marked with a warning icon, and the relevant field displays an error message to help you fix it.

Configuration sections

The configurator includes the following sections:

- **Fields**
- **Mobile Fields**
- **Sorting**
- **Conditional Formatting**

- **Filters**

Each section controls a different part of how the component behaves and how records are shown to users.

Fields

In the **Fields** section, you choose which fields should be displayed as columns in the list. You can select up to **10 fields**.

Move fields between the **Available** and **Selected** columns using the arrow buttons. To change the order of selected fields, choose a field in the **Selected** column and move it up or down.

If a field is a **Lookup** or **Master-Detail** field, it is marked with a **>** symbol. Clicking this symbol lets you navigate to fields on the related object. You can go up to **5 levels deep** and add those fields to the selected columns. A breadcrumb above the list shows your current path and lets you move back if needed.

Mobile Fields

In the **Mobile Fields** section, you can define a separate field layout for the Salesforce mobile app. This step is optional. If you do not set a mobile-specific layout, the component uses the same fields as the desktop version.

By default, mobile view shows only the first few fields in a compact layout, with the option to expand the record and see more. This helps keep the mobile experience cleaner and easier to read.

Sorting

In the **Sorting** section, you define how records should be ordered in the list. You can select one or more fields and set the order in which sorting rules are applied.

To configure sorting:

- move fields into the selected sorting area,
- arrange them in the desired order,
- change the sorting direction from ascending to descending where needed.

For example, you can sort records first by **Amount** in descending order and then by **Created Date** in ascending order.

Conditional Formatting

In the **Conditional Formatting** section, you can create up to **4 rules** that change how fields or rows appear in the list.

To create a rule:

1. Select the field to evaluate under **Field to Format**.
2. Choose the condition operator.
3. Enter the value to compare against.
4. Optionally select **Color the row** if you want the formatting to apply to the entire row instead of a single cell.
5. Choose the background and text colors.
6. Click **Add** to save the rule.

Saved rules appear in the list above. You can review them, edit them, or remove them if needed.

Filters

In the **Filters** section, you control which records should appear in the list. You can create filter conditions and define the logic that connects them.

First, choose one of the available logic types:

- **All Conditions Are Met (AND)**
- **Any Condition Is Met (OR)**
- **Custom Logic**

If you choose **Custom Logic**, enter the logic using standard Salesforce-style numbering, for example:
`(1 OR 2) AND 3`

To add a condition:

1. Select the field to filter by.
2. Choose the operator.

3. Enter the value.
4. Click **Add**.

Like in the Fields section, you can also navigate through lookup fields marked with **>** and use the breadcrumb to move between levels. Existing conditions can be removed using the **X** icon.

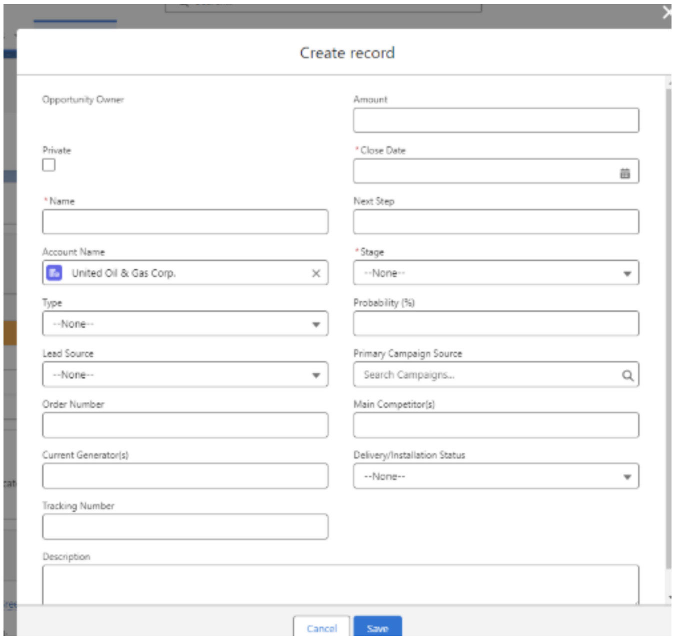
8. Using Spyrosoft - Enhanced Related List

After the component is set up and configured, users with the required permissions can start working with the list. Both **Sweet Related List** and **Sweet Object List View** are designed to feel familiar to Salesforce users, while adding more flexibility and more powerful actions.

Depending on the configuration and user permissions, the component can support the following actions:

- create new records,
- edit, delete, clone, or change owner,
- edit values directly in the list,
- update multiple records at once,
- personalize sorting, filters, and conditional formatting,
- export results to a file,
- import and export configuration for editor-level users.

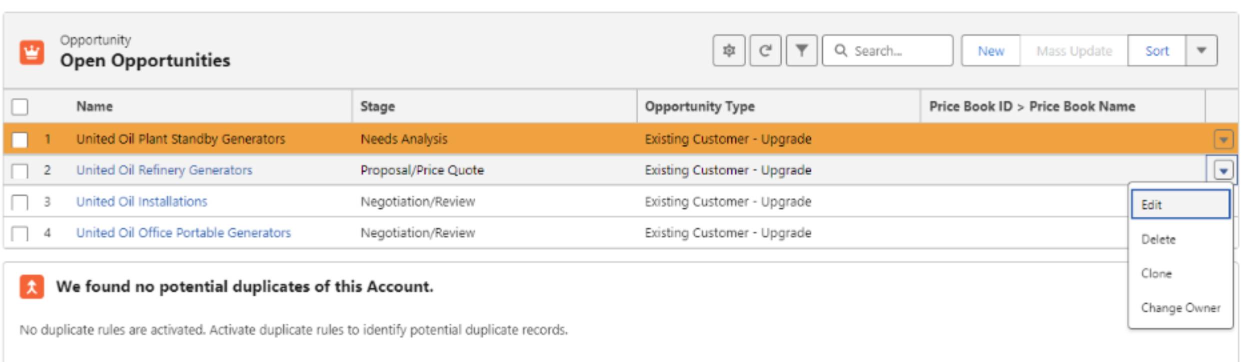
Create a new record



To create a new record, click the **New** button in the component toolbar. This opens a modal window where you can enter the details for the new record.

This option is useful when users want to add a related record without leaving the current page.

Edit, delete, clone, or change owner



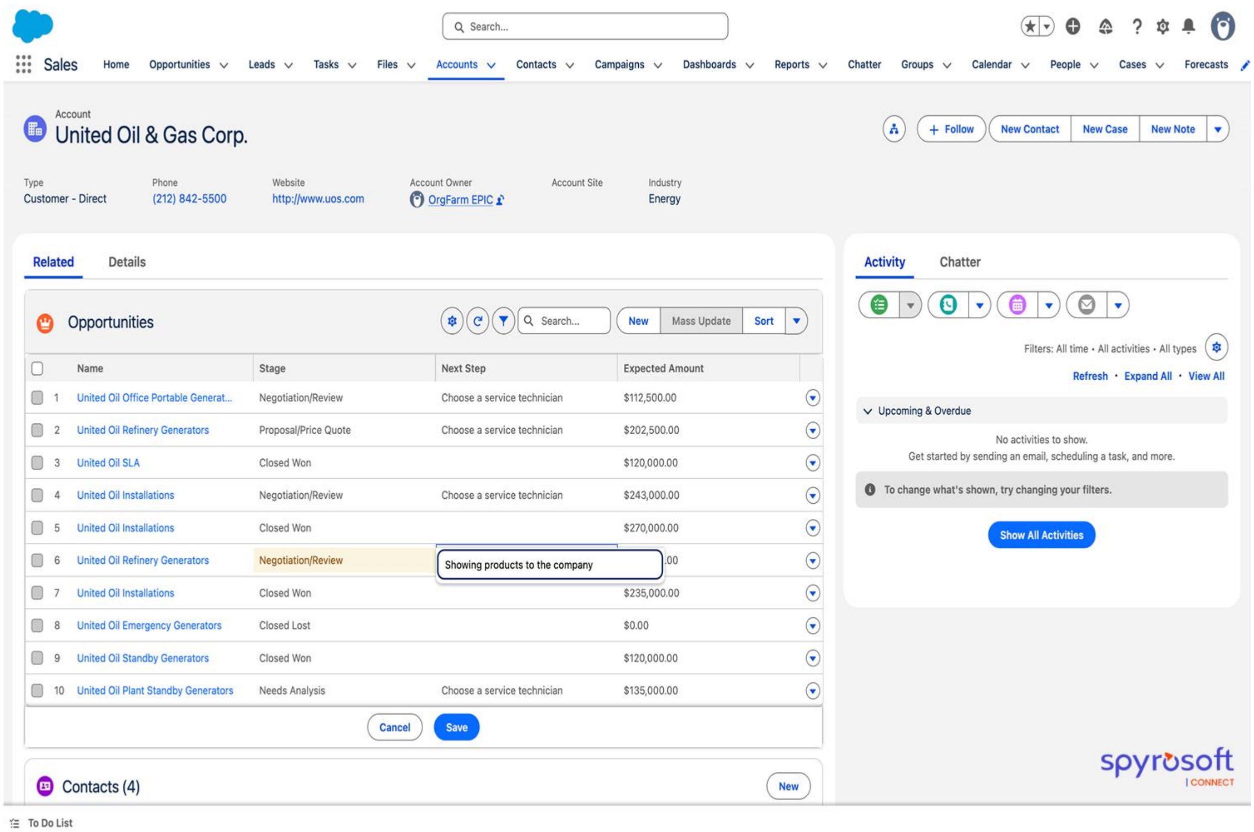
To perform actions on a single record, open the action menu at the end of the row. Depending on the available actions and your Salesforce permissions, you can:

- **Edit**

- **Delete**
- **Clone**
- **Change Owner**

These actions make it easier to manage records directly from the list, without opening each record first.

Inline editing



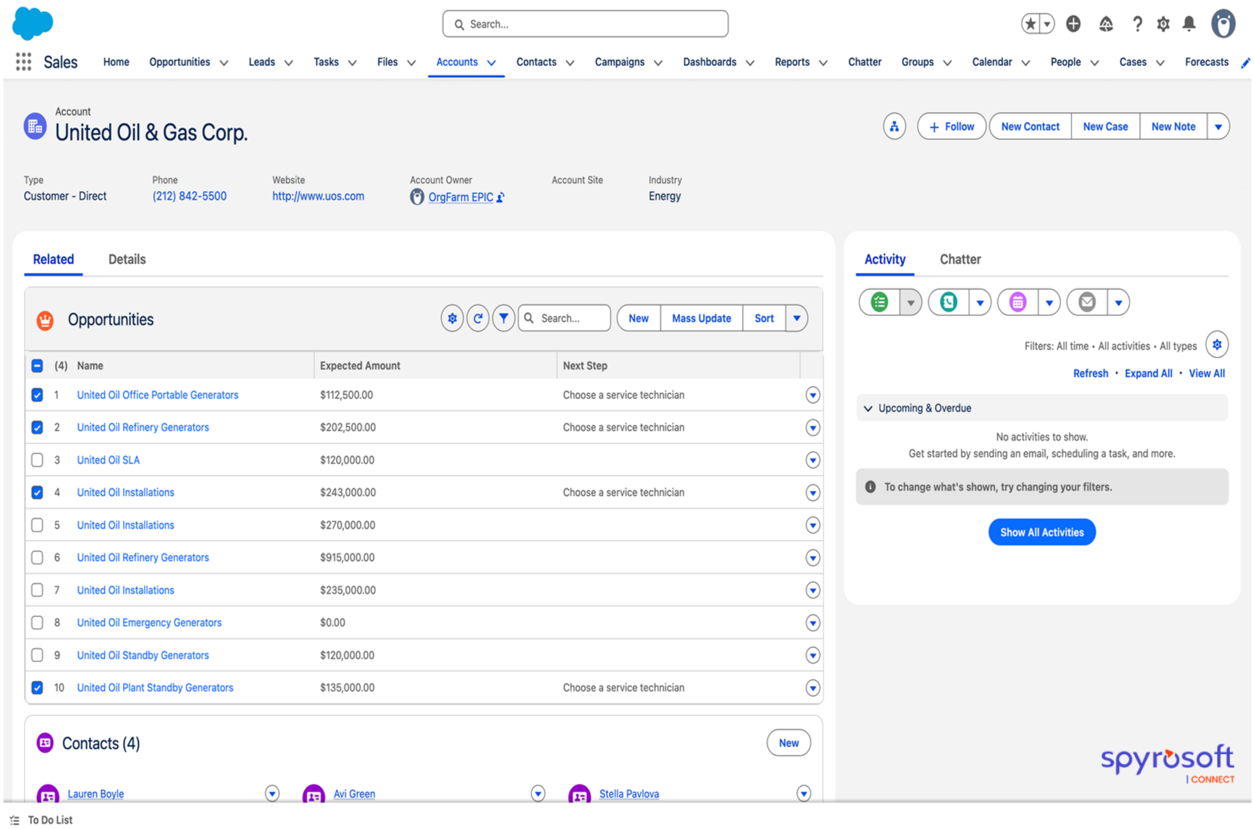
Spyrosoft - Enhanced Related List supports inline editing for fields shown in the table. To edit a value, hover over a cell and click the edit icon when it appears.

You can update more than one field before saving. When you finish, click:

- **Save** to keep the changes
- **Cancel** to discard them

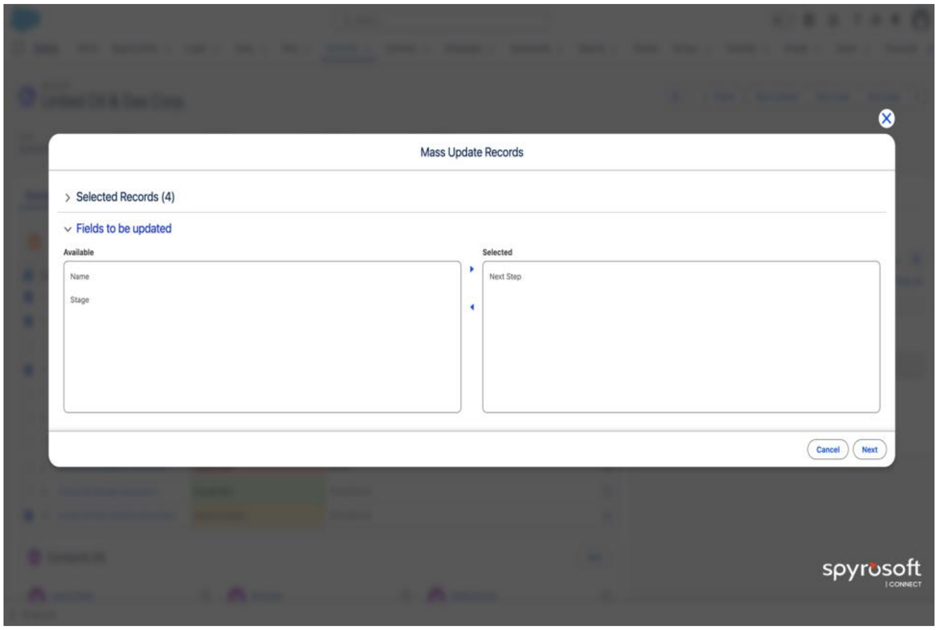
Inline editing is especially useful for quick updates across multiple records.

Mass update



The component also supports updating multiple records at the same time. To use this feature:

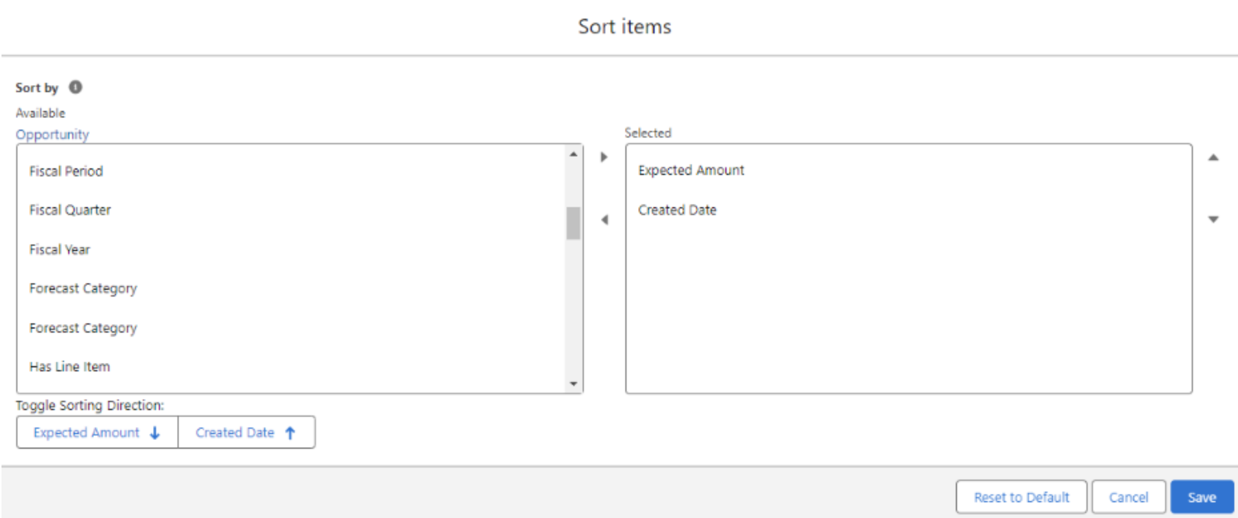
1. Select the records you want to update by checking the boxes next to them.
2. Click **Mass Update** in the toolbar.
3. Choose the fields you want to update.



4. Move to the next step and enter the new value or values.
5. Click **Save** to apply the changes, or **Cancel** to exit without saving.

Mass update is one of the most practical features in the component, especially when users need to make the same change across many records.

Personalize list settings



Users can personalize parts of the list behavior without changing the shared configuration. According to the guide, all settings except displayed fields can be personalized at user level.

This includes:

- **Sorting**
- **Filters**
- **Conditional Formatting**

These changes apply only to the current user and do not affect other users.

Personalize sorting

Users can change sorting by clicking the **Sort** button or by selecting a column header. This opens the sorting settings, where they can adjust the sort order for their own view.

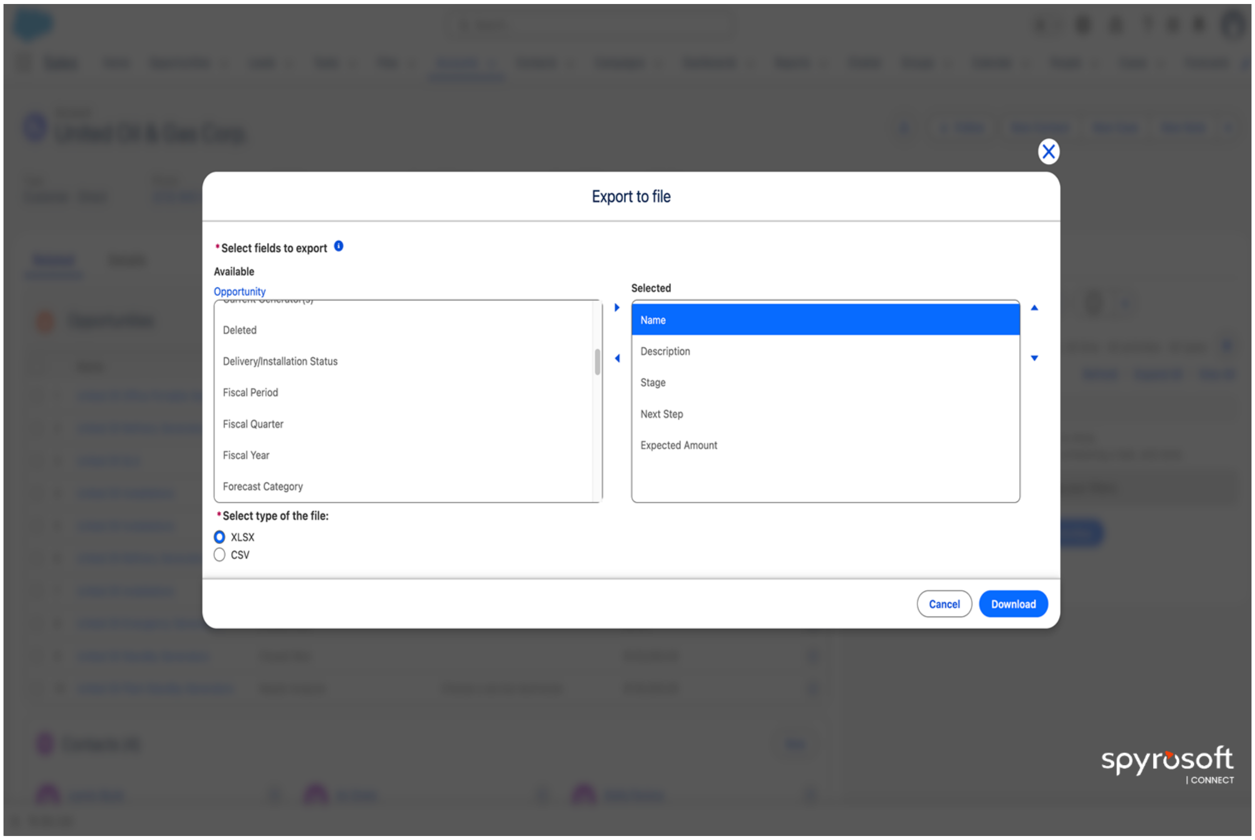
Personalize filters

Users can click the **filter icon** to update the filter conditions used in their own view of the list.

Personalize conditional formatting

Users can click **Conditional Formatting** to change how records are highlighted in their own view. This option may appear directly in the toolbar or inside the additional actions menu.

Export to file



The component allows users to export list content to **XLSX** or **CSV**. To do this:

1. Open the toolbar menu.
2. Select **Export to file**.
3. Choose the fields that should be included.
4. Select the file format.
5. Click **Download**.

This feature is useful when users need to review the data outside Salesforce or share the results with others.

Export or import configuration

Users with the **Related List Editor** permission set can also export and import configurations. This option allows teams to move saved component configurations between environments, such as from Sandbox to Production. Supported formats include **XLSX** and **CSV**.

This feature is intended for admins or editors who manage component setup across orgs.

Best practice

Use shared configuration changes only when you want to affect all users of the same configuration. For personal changes, use the user-level sorting, filters, and formatting options instead.

It is also a good idea to:

- save inline edits only after reviewing all changed values,
- double-check selected records before running mass update,
- export only the fields that are really needed.

Important note

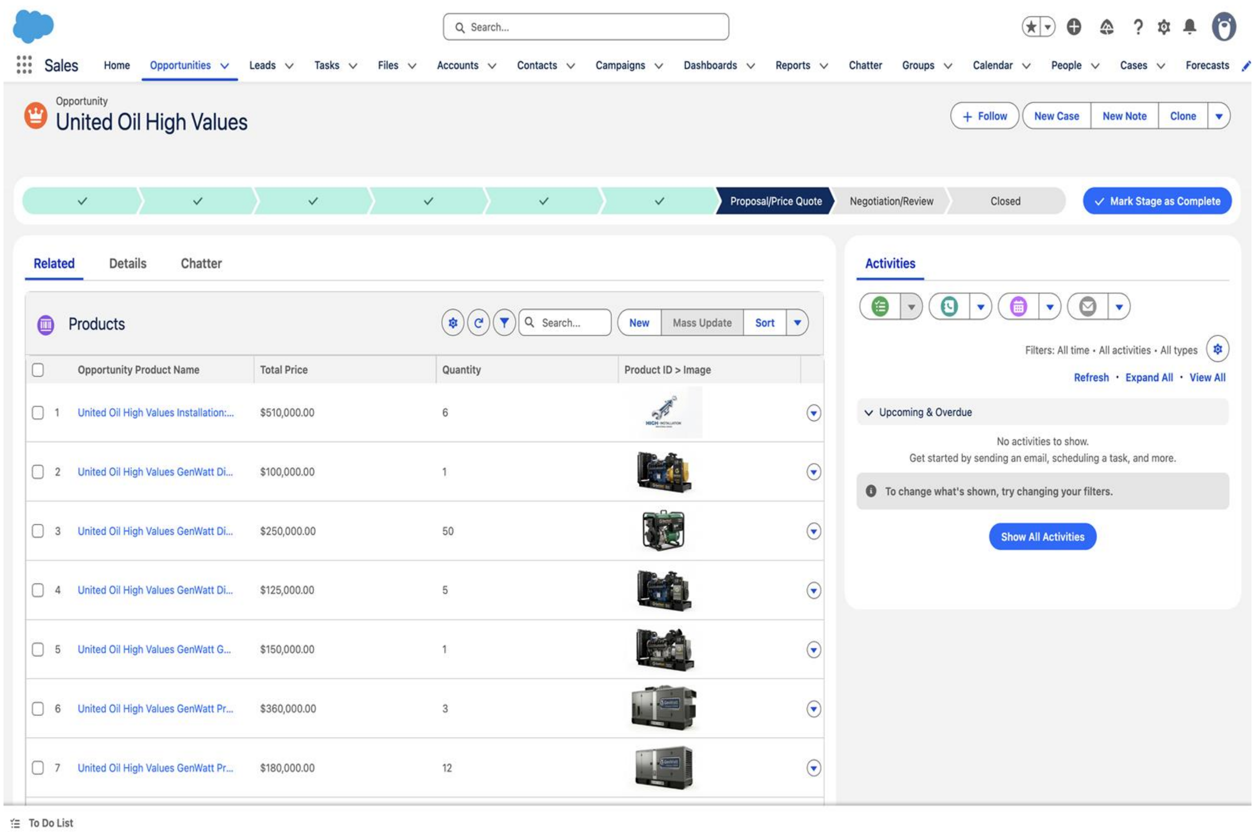
The actions available in the component can depend on:

- the component configuration,
- object settings,
- Salesforce user permissions,
- record-level access.

Because of this, some users may see different actions than others.

9. Displaying Images from URL Fields

Spyrosoft - Enhanced Related List can display image previews in both **Sweet Object List View** and **Sweet Related List** when a field contains a supported image URL. This feature helps users recognize records faster and makes lists easier to scan, especially when working with product images, profile photos, or other visual references.



Supported image values

Image preview works when a **URL** field contains:

- a direct link to an image file, such as `.jpg`, `.png`, or `.gif`
- a value marked with the **IMG:** prefix, for example: `IMG:https://yourdomain.com/image`

By default, the component recognizes both formats.

Trusted URLs

If the image is hosted on an external domain, that domain must be added to **Trusted URLs** in Salesforce. Without this step, image previews from that domain may not display correctly.

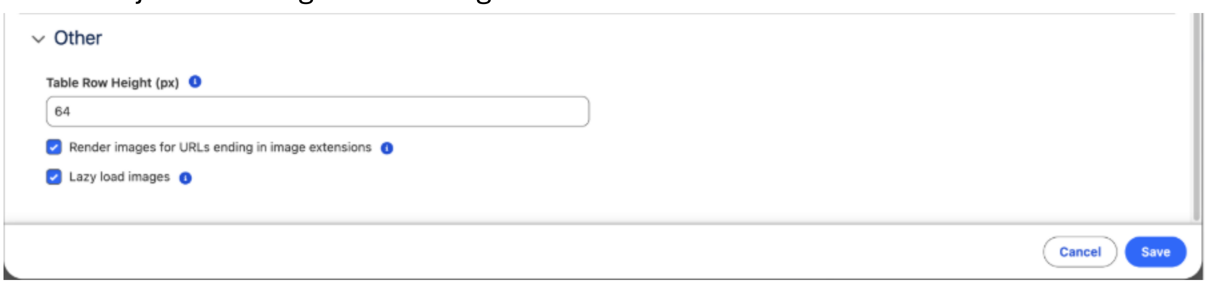
This is an important setup step for administrators, especially when image links come from third-party systems or external websites.

Default image size

By default, image previews are displayed at **32 px**, which matches the standard row height in the list. This keeps the layout compact and readable.

If needed, the image size can be changed in the component settings:

1. Click the **gear icon**.
2. Open the **Other** section.
3. Adjust the image size setting.



Control how image links are detected

By default, the component displays image previews when the link:

- ends with a supported image file extension,
- or starts with the **IMG:** prefix.

This behavior can be changed. If the option is turned off, the component will display previews **only** for links that use the **IMG:** prefix.

This can be useful when you want more control over which URL fields should be treated as images.

Performance and lazy loading

To improve performance, the component uses **lazy loading** by default. Images are loaded only when they are close to the visible part of the screen. This helps the list stay responsive, especially when it contains many rows or larger image files.

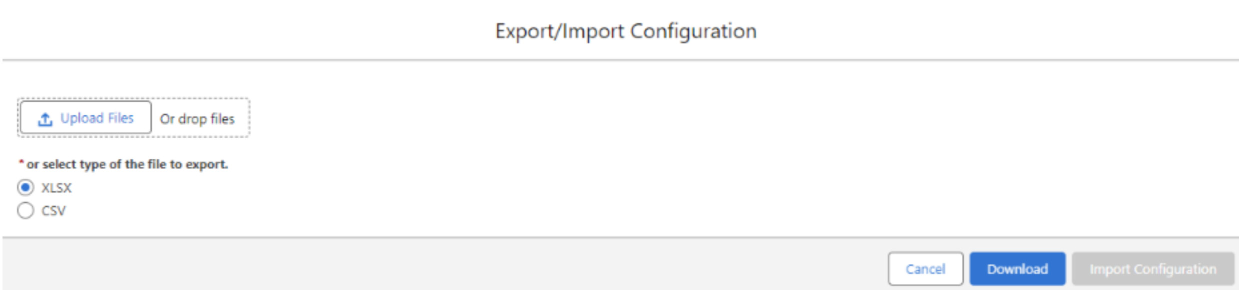
Best practice

For the best results:

- use direct image links in URL fields,
- add external domains to **Trusted URLs** before testing,
- use the **IMG:** prefix when you want to control exactly which values should display as images,
- keep image size consistent for a cleaner layout.

10. Export and Import Configuration

Users with the **Related List Editor** permission set can export and import component configurations. This makes it easier to reuse existing setups and move them between Salesforce environments, for example from **Sandbox** to **Production**. Supported file formats include **XLSX** and **CSV**.



This feature is useful when you want to:

- copy a working configuration to another org,

- keep a backup of an existing setup,
- speed up deployment across environments,
- avoid rebuilding the same configuration manually.

Export a configuration

To export a configuration:

1. Open the component on the page.
2. Open the toolbar menu if the option is not visible directly.
3. Click **Export/Import Configuration**.
4. Choose the export format: **XLSX** or **CSV**.
5. Download the file.

The exported file can then be saved for documentation, backup, or reuse in another Salesforce org.

Import a configuration

To import a configuration:

1. Open the component on the page.
2. Open the toolbar menu if needed.
3. Click **Export/Import Configuration**.
4. Select the file you want to import.
5. Complete the import process and save the configuration.

This allows administrators and editors to move previously created component settings into another environment more efficiently.

When to use this feature

Export and import configuration is especially helpful when:

- the same list setup is needed in more than one org,
- you are preparing for deployment from Sandbox to Production,
- several pages use a similar configuration,
- you want to preserve a working setup before making further changes.

Best practice

Before importing a configuration into another environment, review whether the target org contains:

- the same object structure,
- the same fields,
- the same related lists where required,
- matching configuration needs.

A configuration may need small adjustments after import if the source and target orgs are not fully aligned.

It is also a good idea to:

- keep a backup copy before replacing or updating an existing configuration,
- use clear file names so exported configurations are easy to identify later,
- test the imported configuration before releasing it to end users.

Important note

This feature is available only to users with the **Related List Editor** permission set. Regular users can work with the component, but they cannot import or export shared configurations.

11. Troubleshooting

If Spyrosoft - Enhanced Related List does not work as expected, the issue is usually related to permissions, configuration, page setup, or missing Salesforce trust settings. The points below cover the most common situations described or implied in the guide and the update notes.

The component shows an error or does not load

Make sure the user has the correct permission set assigned.

- Users who need to work with the component should have **Related List User**
- Users who need to configure the component should have **Related List Editor**

If the required permission set is missing, the component may show an error or may not work correctly.

The gear icon is not visible

If the **gear icon** is missing, the user most likely does not have the **Related List Editor** permission set. Only users with editor access can open the configurator and update the shared configuration.

The component appears, but the data is not correct

Check the component setup in **Lightning App Builder**.

For **Sweet Related List**, confirm that:

- the correct **Related List** was selected,
- the **Config Name** is correct,
- the component is placed on the intended **Record Page**.

For **Sweet Object List View**, confirm that:

- the correct **Object** was selected,
- the **Config Name** is correct,
- the component was added to the intended page.

A wrong configuration name can cause the component to load an unexpected saved setup.

Only the Id column is shown

This usually happens when the component is using a **new configuration name** that has not been fully configured yet. In that case, the preview may show only the **Id** column until fields and other settings are saved in the configurator.

Open the configurator and define the required fields, sorting, filters, and other settings.

Changes appear in another component too

This is usually caused by reusing the same **Config Name** in more than one place. The guide explains that configuration is tied to the configuration name, so components using the same name can share the same saved setup.

If you want separate behavior, create a different configuration name.

Filters, sorting, or formatting do not behave as expected

Open the configurator and review:

- selected fields,
- sorting order,
- filter logic,
- conditional formatting rules.

Pay special attention to:

- the order of sorting fields,
- whether filter logic is set to **AND**, **OR**, or **Custom Logic**,
- whether conditional formatting rules are targeting the correct field and value.

A small mistake in configuration logic can change the results significantly.

Records cannot be edited or updated

If inline editing, mass update, or record actions are unavailable, check:

- Salesforce object permissions,
- field-level access,
- record-level access,
- component configuration,
- user permissions in Salesforce.

Some actions depend not only on the component itself, but also on the user's Salesforce access.

Image previews do not display

If images from URL fields are not shown, check the following:

- the field contains a supported image link such as `.jpg`, `.png`, or `.gif`
- or the value uses the **IMG:** prefix
- the external domain is added to **Trusted URLs**
- the image preview settings in the **Other** section are configured as expected

Also remember that if the detection option is changed, the component may display previews only for links with the **IMG:** prefix.

Export or import does not work

Make sure the user has the **Related List Editor** permission set, since export/import of configuration is available only to editor-level users.

If you are importing a configuration into another org, also check whether the target org has:

- matching objects,
- matching fields,
- matching related lists where needed.

Differences between environments can cause import issues or require manual adjustments after import.

Mobile view looks different from desktop

This may be expected behavior. The guide explains that **Mobile Fields** can use a separate layout, and mobile view may show only the first few fields in a compact format by default.

Check the **Mobile Fields** configuration if the mobile layout does not match what you expect.

Best practice

When troubleshooting, start with these four checks:

1. confirm the correct permission set is assigned,
2. confirm the page component properties are correct,
3. confirm the **Config Name** is the intended one,
4. review the shared configuration in the configurator.

In most cases, the issue can be found in one of these areas.

12. Support

If you have any additional questions or need help with setup, configuration, or troubleshooting, please feel free to reach out to our team.

Support form: https://spyro-soft.com/services/crm-systems#form
Contact email: salesforce.support@spyro-soft.com