LDRD (Lightning Dynamic Relation Data) Admin Setup Guide

Table of Contents

1. Features

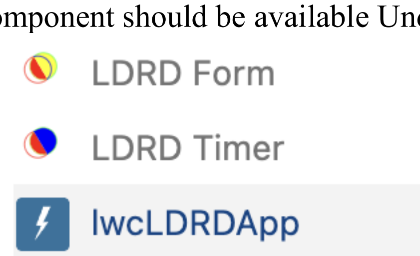
Lightning Dynamic Relation Data Component is a powerful and versatile component that every Salesforce Admin should consider as part of their Lightning page strategy. It enables seamless display of data from the current record, parent records, or related child records, allowing admins to build highly modular, filtered, and conditionally rendered Lightning pages with optional auto-refresh capabilities. The component can be deployed across Record Pages, Home Pages, and even User-based contexts, with support for Apex plug-ins to extend its behavior.

With the addition of **AI Insights**, the component goes beyond data presentation to deliver *actionable intelligence*. AI-generated summaries highlight key trends, surface important relationships, and identify potential data gaps across related records in real time. The advanced Apex plug-in framework supports retrieval of complex direct and indirect relationships, enabling AI to analyze broader data context and provide meaningful recommendations—helping users move from viewing data to making informed decisions faster.

- 100% Native Salesforce Lightning Component with **AI Enabled**
- Data is Secured with in the Org and Respect User Security
- Allowed to Setup on any Record Page, Home Page, Community Page and Console Pages with Setup Parameters and metadata Setup.
- Available to Use in Unlimited, Enterprise, Professional, Group and Community Builder.
- Data shows in Tab, Stack, Accordion, Map, Grid, Carousal, Pdf , **AI Insights** styles.
- Generate Pdf Document with Setup from any data object in your Org.
- Grid In-line Edit with Data Validations and Error messages for each row.
- Advanced Features like Pagination, Auto Refresh, Dynamic binding filters
- Component can be Setup to Show any direct or Indirect Related Data and has Apex Plugin feature.
- Allow to Setup Sub (Child) Component with Tab, Stack or Accordion Style Components to Support Master Detail(s) relation.
- Optionally allow to show Popup or Toast message based on Data Conditions. Alert anyway with any condition.
- Optionally Allow to Create New Record of Required sObject with Meta data Setup.
- Now you can show custom message when no records fetched by component.
- Allow to Embed in Flow and pass All Parameters (See Flow Enable Section).
- This Component Can be used in Org with Data Shield also
- Copy to Clipboard button will copy the Component Data into Tab delimited format to Clip board. User can paste the data into spreadsheet or Text Editor as needed.

1.1. Availability

- Component should be available Under Custom – Managed Section in Lightning Component Section.



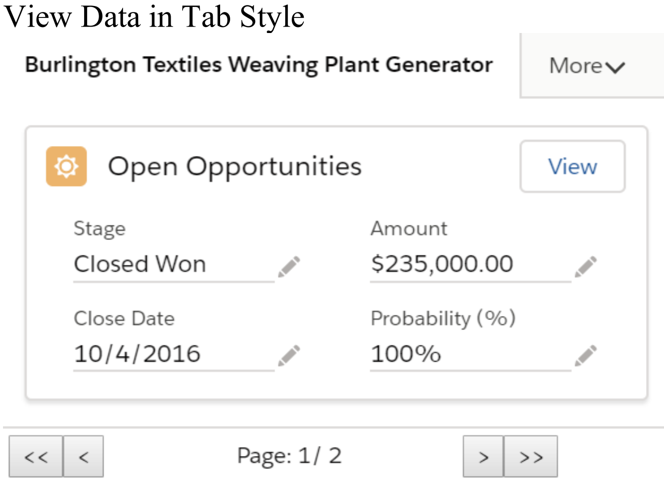
1.2. Output Styles

1.2.1. Stack

- View Data in Stack format
- Allow to do Pagination with number of records per Page
- Allow to do In-line Edit on the same Page and Auto Save records
- Auto Refresh Data Every #n minutes

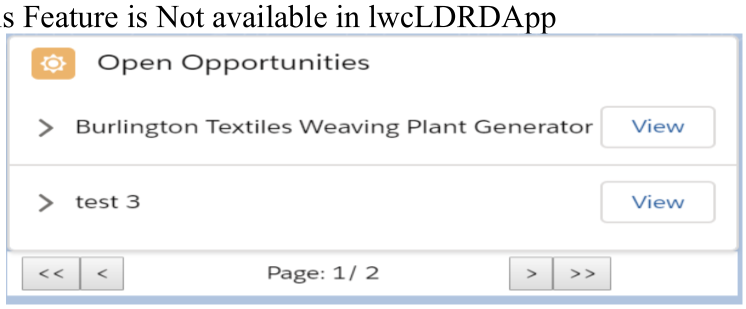
1.2.2. Tab

- View Data in Tab Style



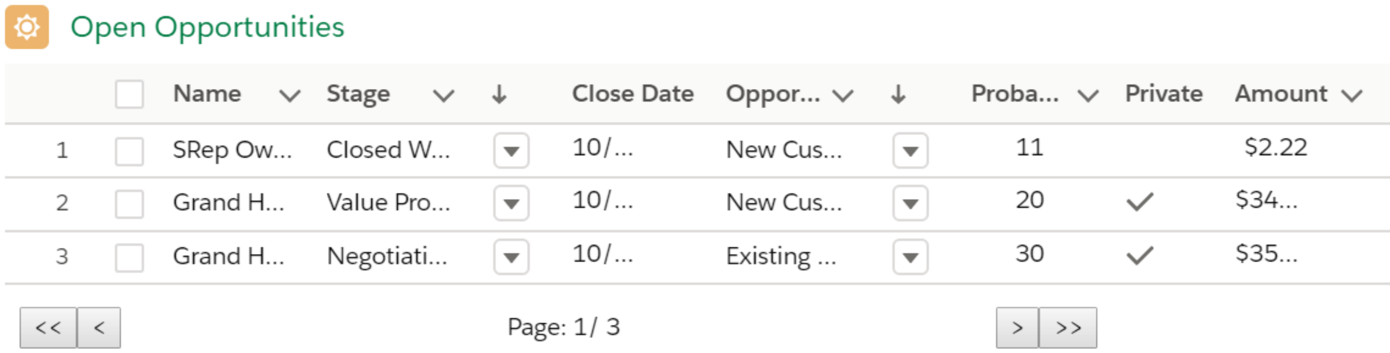
1.2.3. Accordion

- View Data in Accordion Style
- This Feature is Not available in lwcLDRDApp



1.2.4. Grid

- View Data in Grid Style. In-line Edit of Grid allow the mass updates and allow to save with single Save.
- Picklist Fields has Special Button to show Possible Values and allow to assign for all Selected Rows.
- Grid data performance is based on Number of Records and number columns in output.
- Recommended grid number records is below 50. If Number of records in Grid is more than 50 rows please use pagination setup.
- Allow to Select Parent or Grand Parent Field with dot notation. Ex. Account.Name, Owner.Email

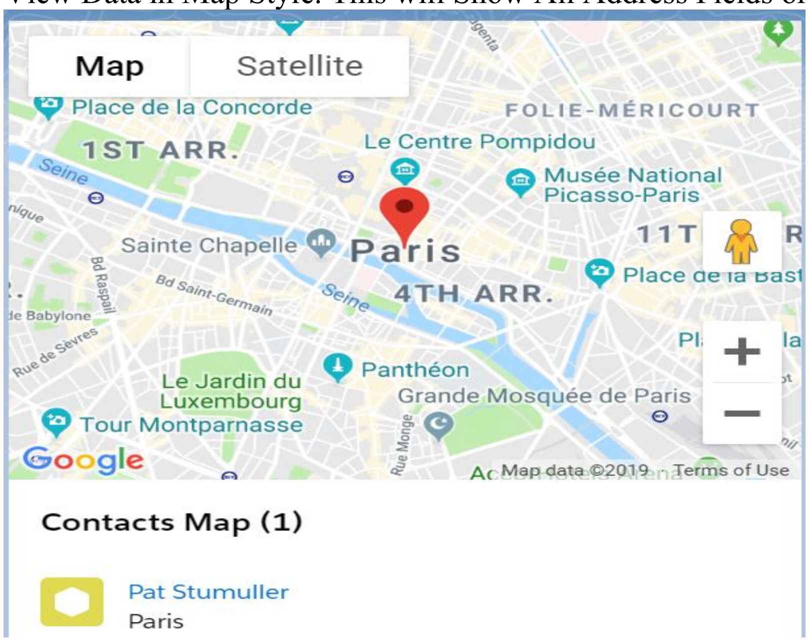


Open Opportunities

		Name	Stage		Close Date	Oppor...		Proba...	Private	Amount
1		SRep Ow...	Closed W...		10/...	New Cus...		11		$2.22
2		Grand H...	Value Pro...		10/...	New Cus...		20	✓	$34...
3		Grand H...	Negotiati...		10/...	Existing ...		30	✓	$35...

1.2.5. Map

- View Data in Map Style. This will Show All Address Fields or Latitude, Longitude on Map.



1.2.6. Carousal

- View Photos Urls in Carousal Style

-

1.2.7. Pdf

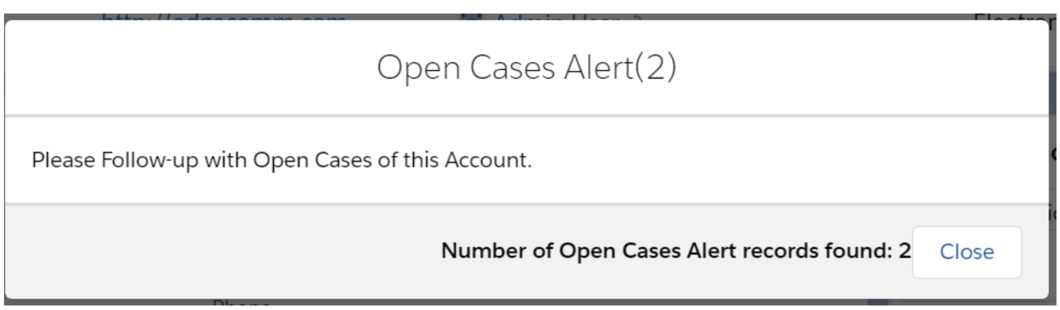
This Option will show the Data in PDF Document Format with Standard Visualforce page format. You can show Pdf Page any Other Styles with Custom Metadata Set. Please See S16 Parameter in myDynPro Setup.

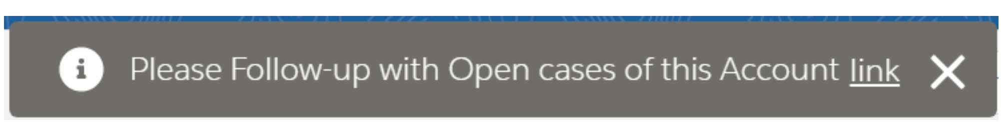
1.2.8. AI Insights

This Option will Show AI Summary of the Component Current Record and Relation Data in Summarized with Custom Prompt and Instructions to AI Agent. See **AI Insights Setup** Section to Enable this Feature.

1.2.9. Alert Management

This new Feature brings the LDRD App to next level to provide the Conditional Alerts to users based on the Data on Record and/or Child records. As an optionally you can Hide the App and still show the Alert to Users to follow next steps.
Example: On Account show Alert when Open Cases exists for this Account.





1. Add Component and Set Parameters to Show Data (Add the Component on Main to show Alert when you want to display immediately open record page)
2. Add Custom Metadata record for myDynPro Setup with Title, Account Combination
3. Select Value in S22: Show Popup Message . Set S26: Alert Toast type to show message as Toast instead of Popup message.
4. Enter Text Message to show on Popup Alert in S23: Popup Message Text
5. If you don’t want to Show Data on Page then Check S25: Hide Component View

2. Setup

2.1. Parameters

1. **Install LDRD Form Component from App Exchange (myDunPro Pack)**
   1. Select Admin, Selected profiles or All profile as per your Org requirements

2. **Using my LDRD Form / lwc LDRD App Component**
   1. Navigate to a Lightning Record page or Home Page, click on the Edit Page to Add this component
   2. Drag and Drop the Component, LDRD Form,/lwcLDRDApp to the desired location

3. When you click on the component, 12 fields will display on the right-side of the screen. Complete the fields with the desired results. Note: Setup this Component on a record page where you have a data so you can see preview while setting component parameters.

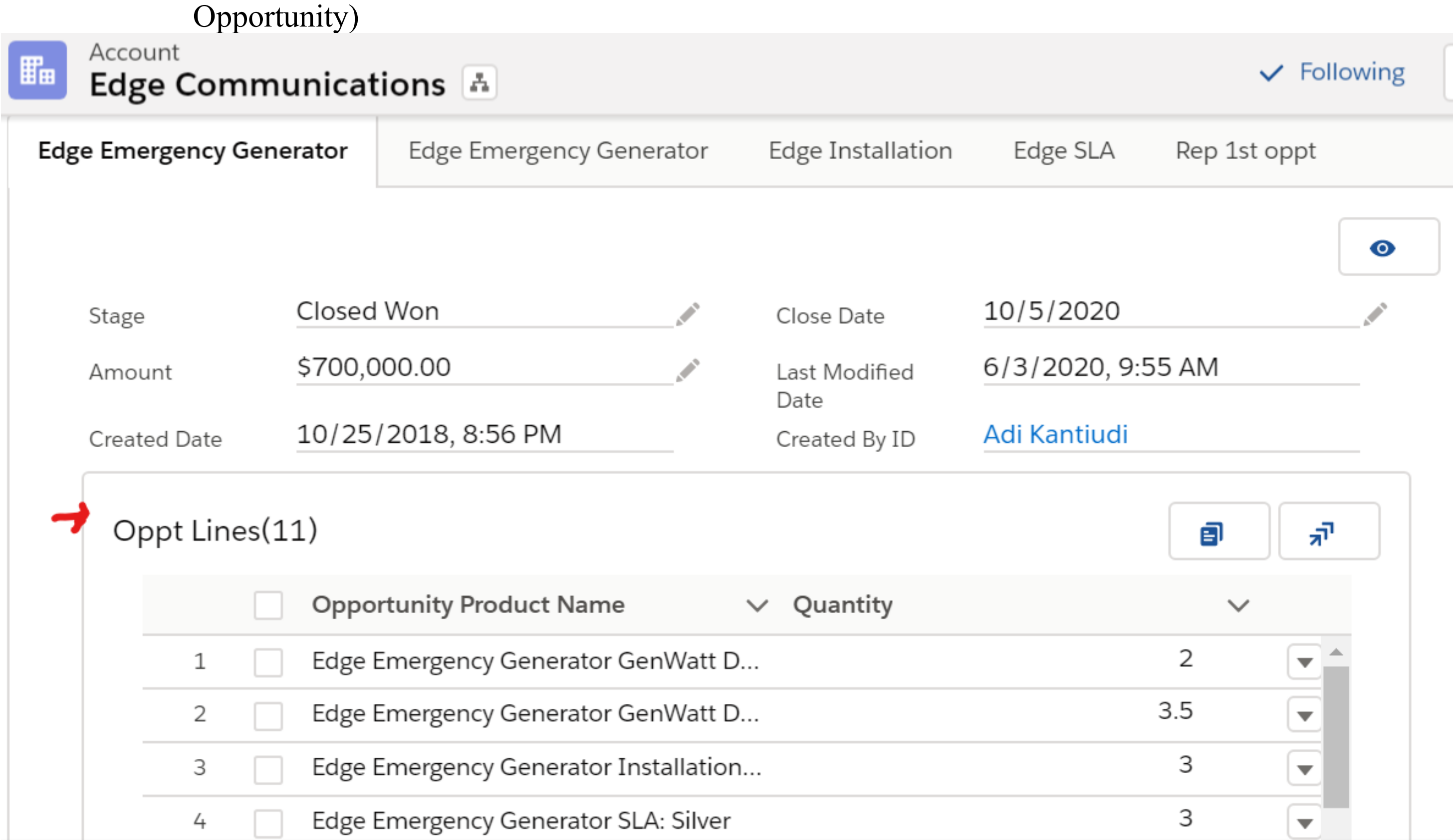
3. **Component Parameters**
   1. **Label** – Title or Heading of your Component to display. The Same Label is used in myDynPro Setup Meta data records. For a single record, the title you want displayed on the component. If multiple records, title will display on each record. Decide your title so it will fit based on your layout.
   2. **Icon Name** - Show Icon for Data records. Use SLDS to find an icon : Format: category:iconname, Example custsom:custom5
   3. **# of Columns to show** - The number of columns you want to display in the output for Tab, Stack or Accordion Style.
   4. **Mode to show your data** (respects SF User security settings)
      i. **view**: User can view and allows In-line Edit, if Editable by User.
      ii. **edit**: fields are editable and edit ready if Editable by User.
      iii. **readOnly**: field display only. Edit is not possible in this mode.
   5. **Lookup Field Name for the Target Object** - This is the most important field for the form. This field determines which Object you want to get the data or it's child records. Open Current Object in Object Manager → copy the Lookup Field's API Name. Enter to See Possible ID Fields.
      - ID → Current Object. Use this when you want get current Object fields or its child relations.
      - Lookup Field ID → Lookup Object. Use this to go one Level up to Lookup Object Field API Name
      - Parent or Grand Parent ID -> Use dot notation to look up to Parent or Grand Parent. Ex. Account.Parent.Id
      - Text Formula → Parent-Parent-Parent-Id (you can go as many Levels Up as you need. This way you can have Conditional ID (Same Lookup Object Type) Based on Current Object's Field value.)
   6. **Child Relationship Name(s)** - In order to display Child records of the Target Object ID you choose in Step 5, provide the Child records relationship name. Enter or Partial name so you can see possible relations
      - HINT: Open Child Object, find Parent Lookup Field and click on field details. Copy and paste child relationship.
      - Enter multiple child relationship Names by semicolon (;) separated, if required. Format: ChildRelation1;ChildRelation2;ChildRelation3
      - Example: ChildAccounts;Contacts;Cases
      - Note1: For Custom Object Relations don't forget to add __r at the end
      - Note2: For Managed Package Relations add Name Space Prefix ("Prefix__Objectname")
      - Example: sbqq__Quotes__r to show CPQ Quotes on Account Object
   7. **Field names of Target Object or Child Object** - Enter the API field name(s) separated by a comma from Target Object or Child Object (names are not case sensitive). You can Enter dot notation to parent and/or grandparent feeds in Grid. Enter or Partial name so you can see possible Field Names.
      - Note1: For Custom Object don't forget to add __c at the end
      - For Map to show correct Place you should Enter Street, City, State, Postal Code, Country and/or Latitude, Longitude Fields.
   8. **Child record title field name** - If you selected Child record relationship in Step 6, here you select the field name to display as the Title for Each child record. Use one of the Fields from parameter 7 so it will not add an extra column on Grid.
   9. **Filter criteria for Child records, if any** - You can filter the Child records selected, if any, by adding a filter. You can add filter logic (and/or operators). You can Enter semicolon (;) separated filter conditions for each child relation in the order specified in step 6. If no semicolon (;) entered the filter will apply to Last child object. Due to SOQL Injection Security reasons **literal** filter values are not allowed. So Use Formula Fields with true/false.
      - ~~Filter by Static Values allowed. Ex. StangeName <> 'ClosedWon' and ClosedName <> 'ClosedLost'~~
      - Static Variables with literals not allowed but you can use formula Fields. Ex. isClose = false, ex. ismyCondOk__c = true
      - Filter by System Variables like Today, Date Formulas, True or False. Ex. CloseDate > Today, `CloseDate > NEXT_N_DAYS:15`

- Filter by Dynamic Binding Fields from Current Object by Enter colon twice (::) in front of fieldname. Example: ClosedDate > ::AccountLastOrderDate

10. **Sort Order of Child records, If any** - Select the display order by adding comma separated list of fields from Child Object.
11. **Data View Style -** Show the selected Data records in the selected Style
    - **Tab**: record(s) displayed in Tab format
    - **Stack**: record(s) displayed in Card format stacked up.
    - **Accordion**: record(s) in a list, will open if multiple records
    - **Grid** – record(s) display only in Table format.
        1) Each Column Sortable
        2) View Record by Choosing View Action At the end of record
        3) Copy to Clipboard by Choosing To Clipboard Action At the end of record
        4) Copy to Clipboard All Data by Choosing To Clipboard on First Column
    - **Map** – Show Map for the record(s) selected with Address Fields entered in step 7.
        1) Admin Set Zoom Level for Each Component by Metadata Setup (See Metadata Section)
        2) Non Address fields from step 7 will show as description of the location.
    - **Carousel –** Show the List of images from Data links based on the records.
    - **Pdf** – Show the Data in Pdf format with Standard Pdf or Custom Pdf.
12. **Description** – Document your Component Setup, so that Admin can review as needed.
13. **Record Id Param** – This the Parameter will be required to Pass the current Object record Id from Flow or communities. The Variable value can be passed like {!recordId} . Don't use this parameter when you Setup on Home or Record Page.

2.2. Sub Component Parameters (If this is Child Component to a Component)

- Setup Sub (Child) Component with in a Component using custom metadata record.
- Sub Components only allowed with in Tab, Stack, or accordion style of Parent Component.
- Sub Component data can be any Style as you specified in Meta data.
- Setup up Meta Data parameters SP00 to SP11 to show sub component.
- See Setup metadata documentation for each parameter.
- Subcomponent metadata record Object Name should be Parent Record's Object API Name. (Ex. Opportunity)



2.3. Metadata Setup

myDynPro Setup Metadata – Admin can Setup Additional Controls for Each Object/Component in myDynPro Setup metadata records. Setup->Custom Metadata Types->myDynProSetup->Manage myDynProSetup . Add New Record with following fields. Deploy metadata records to your target system along with LEX Page Layouts. (Note: If you don't see these fields on Layout Edit Page Layout and Add, so you can maintain the values). A New metadata record required for each subcomponent to setup.

myDynProSetup

Help for this Page

myDynProSetup Detail Edit Delete Clone

Label	Contacts	myDynProSetup Name	Contacts_on_Account
ObjectName	Account	Namespace Prefix	DynPro
S00: Deactivate	☐	Protected Component	☐

Gneral Parameters

S01:MaxRows	0	S02:Title Text Color	slds-text-color_destructive
S03:Records Per Page	0	S04:Auto Refresh	0
S05:Custom Apex Data Class		S10:No Records Message	You have Contacts for this Account. Please Update Contact Email and Phone Numbers if not exists.
S09:New Button Object		S13:Hide View Button	☐
S14:Lazy View	✓	S15. Hide Copy to Clipboard	☐
S21: Show Search Option	☐		

Alert Parameters

S22: Show Popup Message	All The Time	S25: Hide Component View	☐
S26: Alert Toast Type	success	S27: Alert Toast Mode	dismissible
S23: Popup Message Text	Follow-up with contact {0} and maintain required info here {4}		

Grid Parameters

S06:Grid/Pdf Height	500	S07:Grid All or Nothing	☐
S08:Grid Fields Editable Control		S18: URL to Child Relation	
S19:Grid Fields Widths		S20: Grid Columns Wrap Text Control	
S24: Wrap Text Max Lines			

Pdf Parameters

S16. Show Pdf Button	☐	S17. Custom PDF VF Page	

Map Parameters

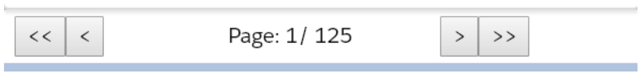
S11:MapZoomLevel	10	S12:Map List View	auto

Sub Component Parameters (If this is Child Component to a Component)

		SP00: Parent Setup Name	
SP02: SubComp IconName		SP03. SubComp #Columns	2
SP04: SubComp Mode	view	SP05: SubComp Lookup Field Name	Id
SP06. SubComp Child Relationship Name(s)		SP07: SubComp Field Names	Id,Name
SP08: Sub Comp Child Record field Name	Name	SP09: SubComp Filter criteria	
SP10: SubComp Sort Order		SP11. Sub Comp Style	Grid

14. **Label –** Label of the Component Entered in Step 1 of Parameters. This is the Part of the Key along with Object Name, so make sure to copy and paste same Value .
15. **myDynPro Setup Name –** Enter Unique Name for Each Record in this metadata setup.

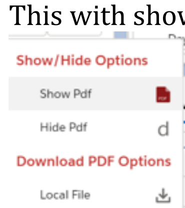
16. **Object Name –** Name of the Object where you used myDynPro Component (ex. Account). Use 'Home' when you want to Setup Component on Home Page. Note: Label and Object Name is Key Combination to Identify by Component.
17. **S00: Deactivate –** When Checked this Component will not display but setup save on lightning page.
18. **S01:MaxRows –** Restrict Maximum number rows on output to display, if needed
19. **S02:Title Text Color –** Title Text Color Name from SLDS Color. Ex. slds-text-color--error
20. **S03:Records Per Page** – Allow your User to see records with Pagination. This Option is recommended if you expect more than 5 records in your component Output. Pagination Tab will come at the bottom of the Data will allow the user to Navigate to First, Previous, Next and Last Pages.



21. **S04:Auto Refresh** – Number of Minutes your Data like to refresh automatically w/o refreshing entire page. Enter 0(Zero), if you don't want to Auto refresh data. This Auto refresh Option is very useful to business Users while they are working long time on a Record Page and child records status and/or date time changes.
22. **S05:Custom Apex Data Class** – This is Apex Plug-in Class that will allow to retrieve and display complicated direct and/or indirect related data from Customer Org data. This Can Return any SObject records from your Org based on Current Object Id or Lookup Id Specified in Component Setup. This Option can be Used on any Record page, but this is best option to show data on Home Page based on Custom Requirements.
    - Custom Apex Class should be Global class with Implementation of dynpro.Custom_data_Interface_Class
    - Class getData method with 4 Parameters and return List of SObject Records
    - Assign Apex Class to User Profile(s) who uses this App feature.
    - Sample Custom Apex Class:

```
global with sharing class Custom_data_myHomepage_Oppt implements
dynpro.Custom_data_Interface_Class {
  global Static List<SObject> getData(String CurrObject, Id CurrId, String LookupObject, Id
  LookupId) {
    List<SObject> lstCustomData = new List<SObject>();

    System.debug('Custom Data Process Started....');
    system.debug('CurrObject:' + CurrObject );
    system.debug('CurrId:' + CurrId );
    system.debug('LookupObject:' + LookupObject );
    system.debug('LookupId:' + LookupId );

            lstCustomData = [select id, Name, CloseDate , Amount , StageName
                 from Opportunity
                where StageName <> 'Closed Won'
                order by StageName, CreatedDate];

    System.debug('Custom Data Process End....' + lstCustomData.size());
    return lstCustomData;
  }

}
```

23. **S06: Grid height –** Set the height of Grid when Grid Style is selected in terms of px. Set 50 for Each Row. Ex. 300 for 6 rows to show.
24. **S07: Grid All or Nothing –** Check this to Allow User to Save grid data All or Nothing. By Default Unchecked means save records Success and show Errors on Failed records.
25. **S08:Grid Fields Editable Control** - Enter String for Each Field to be Editable (1) or Not Editable (0) , Not URL Link (N) for Parent or grandparent field in the same Order of Fields display. Ex. 0010 (Read only, Read Only, Editable, Read only Fields). If Blank All Fields are Editable if User has Edit Access.
    - Example: **01N** (Read Only, Editable, NO Lookup URL)

26. **S09: New Button Object –** Enter API name of the sObject to New Button to user, so they can Create New Record for given sObject. It only Create a default record type record. There is no option to choose record type.
27. **S10: No Records Message –** Show this message on Component Card when No record found. If this is blank this option is ignored.
28. **S11:Map Zoom Level –** Enter Zoom Level based on your data (default set to 2)
29. **S12: Map List View** – Show the List of Records at the bottom of Map.
    - **Auto –** Show List if more than one Record
    - **Visible –** Show List All Times
    - **Hidden –** Don't show List of Data
30. **S13: Hide view button –** Check this Option if your users don't want to see View button.
31. **S14: Lazy View** – Check this option to Show Compress View of the Data in Component. Checking this box will improve performance by Not Render Data Immediately, so you can click Expand with show data view button when needed. By default this is Off, so current components show the data immediately. User can hide Data with Hide data View button as needed.
32. **S15. Hide Copy to Clipboard –** Check this option to hide Copy to Clipboard
33. **S16. Show Pdf Button –** Check this option to show Pdf button on Component which will let the user to show/hide Data in Pdf Style. This is an Additional Option on top of the Style selected in Component.
    - This with show the data in Standard Pdf page comes from LDRD managed package
    - 

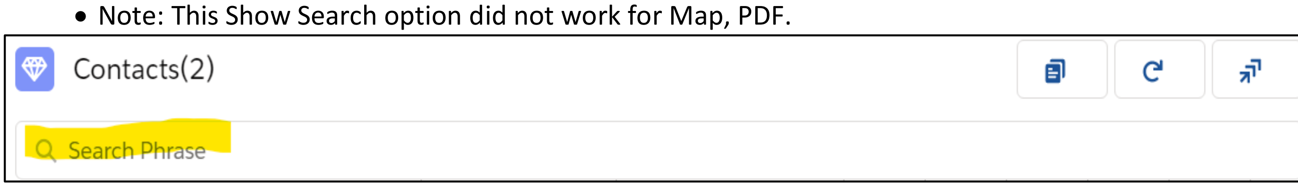
    - Show Pdf – shows the Data in Pdf format based on Standard or Custom Pdf page
    - Hide Pdf – Hide the Pdf page and shows data back in the style selected in parameter 11.
    - Local File – This will Open Pdf page in Full page, so use can download to Local file and/or Print.
    -
34. **S17. Custom PDF VF Page**
    - With this option you can setup a custom Pdf page. With managed package the Sample page **dynpro__mydynproSample**.
    - You can use this Sample page and create your own Visualforce page and customize as per your business requirements.
    - Setup your custom Page name in this option start with c__ or your Org name space. Example: c__myCustomPdf1
    - With this custom Option you can use the following parameters in Visualforce page
        - **data** have all the Sobject records retrieved
        - **cols** have all the Columns setup in Display Columns . col.fieldName is Technical Name
        - **current** reocord data of all the felds of the Current Object where this Dynpro Se tup
        - Ex: {!current['Id']} {!current['Name']}
        - **lookup** reocord data of all the felds of the Lookup object based on Param 5
        - Ex: {!lookup['Id']} {!lookup['Name']}
    - Custom Additional data retrieval possible with extensions="myExt1" in the VF Page.

```
global  with sharing class myExt1 {

    global String title{get; set;}
    global String subtitle{get; set;}

   global myExt1(DynPro.dynprovfExtController controller) {
```

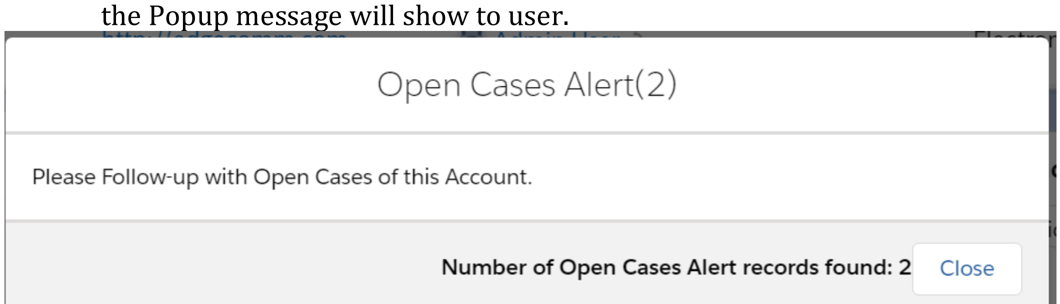
```
        title = 'This is my Custom Title';
        subtitle = 'Subtitle here';

      }

    }
```

35. **S18: URL to Child Relation**
    - This option will provide a Link to a related list based on Component Title. This will be useful when user likes to see standard List.

    -
    - URl: /lightning/r/{Current Object ID}/related/{S18 Param} /view
    - Example: /lightning/r/001f400000dz9l7AAA/related/**Opportunities**/view
36. **S19: Grid Fields Widths**
    - This option will help to setup predefined Grid column width with number of pixels required.
    - Enter Width in Pixel Size numeric format for Each Field to set the Initial Width in the same Order of Fields display. Enter Column Sizes in Comma Separated format.
    - Ex. 60,125,50,0,250. If Blank All Fields are Auto Sized. Note: 0 indicate that Column will be set as Auto Width.
    - If Non numeric Values Entered then you get Error on Component like 'Invalid integer: 140p'. so Enter only numeric size.
37. **S20: Grid Columns Wrap Text Control**
    - Set a W(Wrap Text) or C(Clip Text) for Each Column in the same Order of Fields display. Enter Column Sizes in Comma Separated format.
    - Wrap Text Off as Default for each Column.
    - Ex. CWWCC. This means Col1 Clip, Col2 Wrap, Col3 Wrap, Col 4 Clip, Col5 Clip
38. **S21: Show Search Option**
    - Activate the Search Filter to allow Text Search. This will show a Search Filter field above Component Data and let the User Search to Filter records on Client side.
    - This will do Text search and filter data and display filtered rows.
    - Search phrase will do text comparison. Use true/false to find checked or unchecked records. Use Date time in UTC format yyyy-mm-ddThh:mm:ssZ.
    - Note: This Show Search option did not work for Map, PDF.



39. **S22: Show Popup Message**
    - This Option allow to Popup message specified in S23 Parameter text based on Data Conditions.
        1) –None—This will Not show any Popup message
        2) All the Time – When Component Present on a Page the Popup message will show to user.
        3) Only When No Records Found – When Component Present with No data records found then the Popup message will show to user.
        4) Only When Records Found – When Component Present with data records found then the Popup message will show to user.



    -

40. **S23: Popup Message Text**

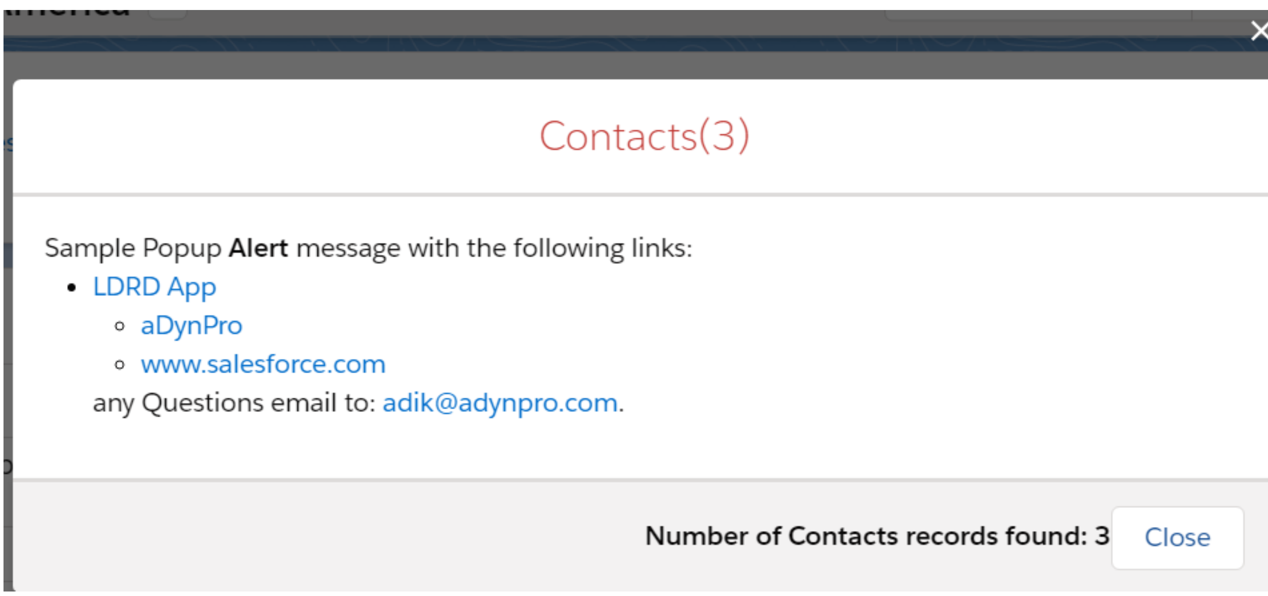
- This will the body of the Popup message Text. This will show Rich text with Hyper links as defined in this field in Popup Window.
- This Message text will allow to Show Data content from the fields specified in Parameter 7 in the Order starting 0 index. You can enter combination of fixed text and dynamic parameters here.
    1) For Related list data it shows 1st record from list return
    2) For Current record (w/o Parameter 6 Value) it shows values from Current record.
- Example for Toast Message:

    Work with Open Case {1} as soon as Possible. Follow-up with Customer {3}.
- Example for Popup Window:

    Sample Popup Alert message with the following links:

    <a
    href="https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FYEGwUAP&channel=recommended">LDRD App
    aDynPro
    www.salesforce.com

    any Questions email to: adik@adynpro.com.



41. **S24: Wrap Text Max Lines**

- Number Text Lines will display when Wrap Text on Grid Column

42. **S25: Hide Component View**

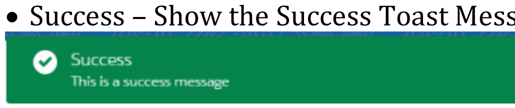
- This will hide the Component from Page, but is Not Deactivate. When this checked it will not display Component on Page but will show Popup message as per S22 Parameter.

43. **S26: Alert Toast Type**

- None – Show message as Popup window, Based on S22 Parameter
- Warning – Show as Warning Toast message

- Error – Show the Error Toast message

- Success – Show the Success Toast Message



- Info – Show the Information Toast Message

44. **S27: Alert Toast Mode**
    - None/Dismissible – Show message and allow user to close before auto hide (5 Secs)
    - Pester - Show message before auto hide (5 Secs)
    - Sticky - Show message and user has to close
45. **S28: Allow Delete**
    - Allow to delete records in Grid. This will delete the record(s) selected and will show success message. If any deletes fail then the error message will show on Grid for each failed record.
    - This will Use S07: Grid All or Nothing option when deleting records.
46. **S30: Show AI Button**
    - Check this box to activate AI Insites for this Component
47. **S31: AI Prompt API Name**
    - **E**nter the Custom Prompt Builder API Name (ex. myDynProForm_Data) from Unmanaged Package or your Own Prompt API Name
    - makesure Permission Set Prompt Template Manager added to Admin to Create your own Prompt Templates in Prompt Builder
    - Note: you can use myDynProForm_Custom to provide your own Instructios
48. **S32: AI Prompt Instructions**
    - This Field is optional allow you to Customize the Prompt instructions specific to this component objects.
    - Example:

Your goal is to summarize the record, using the 3rd person point of view.
You must avoid complex language, industry jargon, or technical terms.
When generating the summary, you must not follow the sequence of the data given to you; instead, generate the summary in a cohesive narrative that enhances clarity with a beginning, middle, and ending.
When referring to the summarized record, you must not include articles, such as "the", or any other determiners. For example, you must not say "the Account" nor "the record is an Account", instead, you must say "Account is...".

The following sections should be included in the summary in the following order:
1. Overview
Start with the name bold and linked
Summarize High level details including: Description, Count, Industry, Owner.
2. Related Records only when Provided Relate Records Data:
You MUST include detailed data about key Records
Include data from Related Records
All Related Records MUST be linked

**Do not*summarize each related record in a separate paragraph.
Make the summary concise, each section should contain 2-3 sentences max.
Do not explicitly mention the Name in each section.
Summarize trends across the related records, intermixed with the summary of the main record.
You must not invent any information that is not part of the DATA provided.
If the detail such as Employee Count is not part of the DATA provided, **do not*generate any generic information, instead skip that detail and move on.

49. **SP00: Parent Setup Name**
    - This is the Parent Component metadata record Name (myDynPro Setup Name). This field is the one links the sub components with parent component.
50. **SP02: SubComp Icon Name**
    - Show Icon for Data records. Use SLDS to find an icon : Format: category:iconname, Example standard:case
51. **SP03. SubComp #Columns**
    - **# of Columns to show -** The number of columns you want to display in the output for Tab, Stack or Accordion Style.

52. **SP04: SubComp Mode**
    - Mode to show your data (respects SF User security settings)-view, edit, readonly
53. **SP05: SubComp Lookup Field Name**
    - Lookup Field API Name for the Target Object. This is the field from the parent Component to query sub component data.
54. **SP06. SubComp Child Relationship Name(s)**
    - Display Child records for a Parent Component, provide the Child records relationship API name. Example. Opportunityitems
    -
55. **SP07: SubComp Field Names**
    - Enter the API field name(s) separated by a comma from Target Object or Child Object (names are not case sensitive). Dot Notation to Parent and/or grandparent fields allowed for Grid Style.
    - Example: Name, Email, Account.Phone, Owner.Alias
56. **SP08: Sub Comp Child Record field Name**
    - If you selected Child record relationship in Step SP06, here you select the field name to display as the Title for Each child record. Use one of the Fields from parameter SP07 so it will not add an extra column on Grid.
    -
57. **SP09: SubComp Filter criteria**
    - You can filter the Child records selected, if any, by adding a filter.
58. **SP10: SubComp Sort Order**
    - Select the display order by adding comma separated list of fields from Child Object.
    -
59. **SP11. Sub Comp Style**
    - Show the selected Data records in the selected Style (Tab, Stack, Accordion, Grid, Map, Carousel, pdf)

2.4. Mobile Enable

2.4.1. ***This component can be activated to Phone form Factor on Lighting Page Setup***. Setup your component Fields fit to your mobile requirement.

2.4.2. ***There is No NEED to do the following steps as per older version***. This is Old Code is Obsolete.

2.4.3. This Component can be used in Lightning Action and use that Action in LEX Page and Salesforce 1 Mobile App. follow the steps below.

- Create Lightning Component
    - Open Setup->Developer Console
    - Create New Lightning Component and Enter Name and Submit
    - Copy the Following Sample Component and Change All 12 Component Parameters as per your requirement.

```
<aura:component implements="force:appHostable,
                     flexipage:availableForAllPageTypes,
                flexipage:availableForRecordHome,
               lightning:availableForFlowScreens,
                force:hasRecordId,
               forceCommunity:availableForAllPageTypes,
                force:lightningQuickAction"
                access="global" >

                <aura:attribute name="recordId" type="Id"/>

    <DynPro:myDynProForm
       recordId ="{!v.recordId}"

       title="Acct Open Oppt"
```

```
                icon="standard:Opportunity"
                numberOfColumns="2"
                mode="view"
                lookupField="Id"
                ChildRelationshipName="Opportunities"
                fieldsToDisplay="Name,StageName, CloseDate, Amount"
                ChildRecordTitleField="Name"
                ChildRecordFilter=""
                ChildRecordsOrderBy=""
                Style="Stack"
                compDescription="Ths is to Display Open Oppt"
               />
</aura:component>
```

2.4.4. Create Lightning Action – Create New Action with Action Type 'Lightning Component' and choose the Component you created in previous step.

2.4.5. Assign Lightning Action to Page Layout – Open Page Layout and Drop your new Action in 'Salesforce Mobile and Lightning Experience Actions' Section.

2.5. Flow Enable

Admin can use LDRD form/lwcLDRDApp Component in a flow and use the flow in Quick Action.

2.5.1. Create a flow and Add a Screen

2.5.2. Screen Components->Custom->LDRD Form you see this component and drag and drop into screen Area.

2.5.3. Setup Parameters as required

2.5.4. Pass {!recordId} to 13. Record Id Param , so component will have a record context. This is a required field from flow.

2.5.5. For lwcLDRDApp reactive results comes from Component variable selectedrecordIds.

2.5.5.1. Example : {!ContactsFlow.selectedrecordIds} in Display Text

2.5.6. Save and Activate flow and Use flow where ever allowed to use.

2.6. Reactive Setup

Admins or Developers can Publish Platform Events to Auto Refresh, Hide Data View , Show Data View

2.6.1. Publish a Plat form Event DynPro__LDRD_Component__e from your Lwc, Aura, Trigger and Flow

2.6.2. DynPro__Title__c = Title of your lwc Component

2.6.3. DynPro__recordId__c = Record ID of the Page your Component Setup

2.6.4. DynPro__Action__c = Action Required to Perform. (Refresh, Show Data View, Hide Data View)

```
// Publish Refresh Component for Account Record
List<DynPro__LDRD_Component__e> events = new List<DynPro__LDRD_Component__e>();
DynPro__LDRD_Component__e event = new DynPro__LDRD_Component__e();
event.DynPro__Title__c = 'Test3';
event.DynPro__recordId__c = '001f400000dz9l8AAA';
event.DynPro__Action__c =  'Refresh';
events.add(event);

if (!events.isEmpty()) {
EventBus.publish(events);
}
```

2.7. Subscribe Events

Developer can subscribe to the following Events in lwc components to interact with lwc LDRD App published by lwc LDRD App Component.

2.7.1. Data Refreshed - LDRDAppDataRefreshed__c

2.7.2. Grid Data Saved - LDRDAppGridSaved__c

2.7.3. Grid Row Selection - LDRDAppGridRowSelection__c

Sample:
```
import LDRDAppDataRefreshed from "@salesforce/messageChannel/LDRDAppDataRefreshed__c";
```

AI Insights – One-Time Organization Setup

The **AI Insights** feature requires a **one-time setup per Salesforce org** to enable AI functionality for each component. Follow the steps below to complete the configuration.

3. Document AI Insights Setup

3.1. Enable Einstein

- Go to Setup → Einstein Setup then Activate : Turn on Einstein
- If you don't see this Option as an Admin then contact your AR or Open Salesforce Support Case.

3.2. Install the Unmanaged Package (Prompt Templates)

Install the unmanaged package to access the pre-defined prompt templates.

Package ID: `04tHs000001RItn`

- **Sandbox:** https://test.salesforce.com/packaging/installPackage.apexp?p0=04tHs000001RItn
- **Production:** https://login.salesforce.com/packaging/installPackage.apexp?p0=04tHs000001RItn

After installation, verify the templates:

1. Setup->Permission Set : Prompt Template User to be Assigned to All Users
2. Setup → Prompt Builder
3. Confirm the following templates are available:
   - myDynProForm_Data – Custom prompt with instructions and parameters
   - myDynProForm_Custom – Custom prompt with parameters only

3.3. Configure Named Credentials and Authentication

- Setup → Named Credentials
- Edit Einstein_API
- URL : https:// my Domain Value (Copy your My Domain URL from Setup → My Domain) and Paste the URL into the Named Credential and Save
  - Example: https://**mydynprodemo-dev-ed.my.salesforce.com**

3.4. Configure Auth Provider

- Setup → Auth. Providers
- Open Salesforce_API
- Copy the Callback URL (used in the next step)

3.5. Create External Client App

- Setup → External Client App Manager
- Click New External Client App and Enter the following details:
- External Client App Name: API Connector
- API Name: API_Connector

- Enable OAuth: ✓ Checked
- Callback URL: Paste the URL copied from Auth Provider
- OAuth Scopes: Full Access (full), Perform Requests at any time (refresh_token, offline_access)
- Create the app
- Go to Settings Tab → OAuth Settings
- Click Consumer Key and Secret button
- login with Admin credentials
- Copy the Consumer Key and Consumer Secret (will be used in Next Step)

3.6. Update Auth Provider with OAuth Credentials

- Setup → Auth. Providers
- Open Salesforce_API
- Edit and paste: Consumer Key & Consumer Secret from External Client App
- Set Default Scopes: full
- Save

3.7. Authenticate External Credential

- Setup → Named Credentials
- Select the External Credentials tab
- Open EC_Salesforce_API
- In the Principals section:
- Click the Action dropdown in the Einstein line
- Select Authenticate
- Log in using an Admin user
- Allow Access and Confirm External Access
    - Note: You may need to wait 20–30 minutes after the previous steps before authenticating.
- Verify the Authentication Status shows Configured

3.8. Assign Permissions

- Assign the myDynPro Pack permission set to all users who will use the LDRD App
- If your org using custom profiles or permission sets, ensure users have:
    - Access to External Credential Principal
    - EC_Salesforce_API – Einstein authorization
    - Permission Set Prompt Template User to be Assigned to All Users

3.9. Setup Complete

- AI Insights enabled and ready for use New Feature across applicable lwcLDRD App components
- AI Insights feature in Component Parameter Style is 'AI Insight' should work without any Metadata Setup. If you want a Component Should Show AI Insights button then you have to Setup Custom Metadata.
    - Setup->Custom Metadata Types: Open My DynPro Pack
        - Page Layouts -> Page Layout Assignment
        - Edit Assignment and Assign the Layout to Admin Profile(s)
    - Navigate to Metadata Setup: AI Insights Parameters (S30 - S322)

- Enable the AI features using Custom Metadata for Each Component in my Dynpro Setup Custom Meta Data.

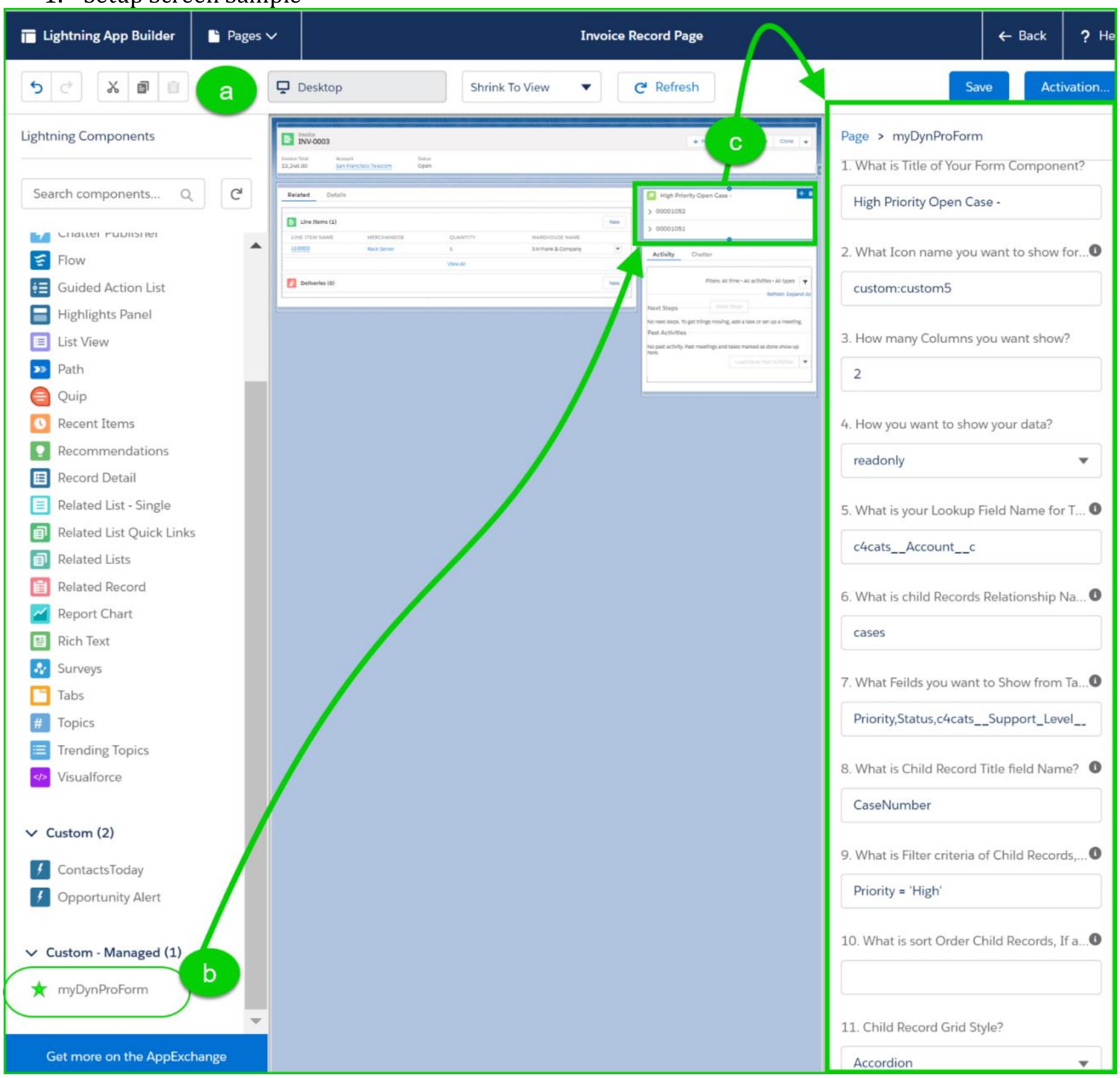
.

4. Business Use Cases and Samples

4.1. Business Requirement Statement

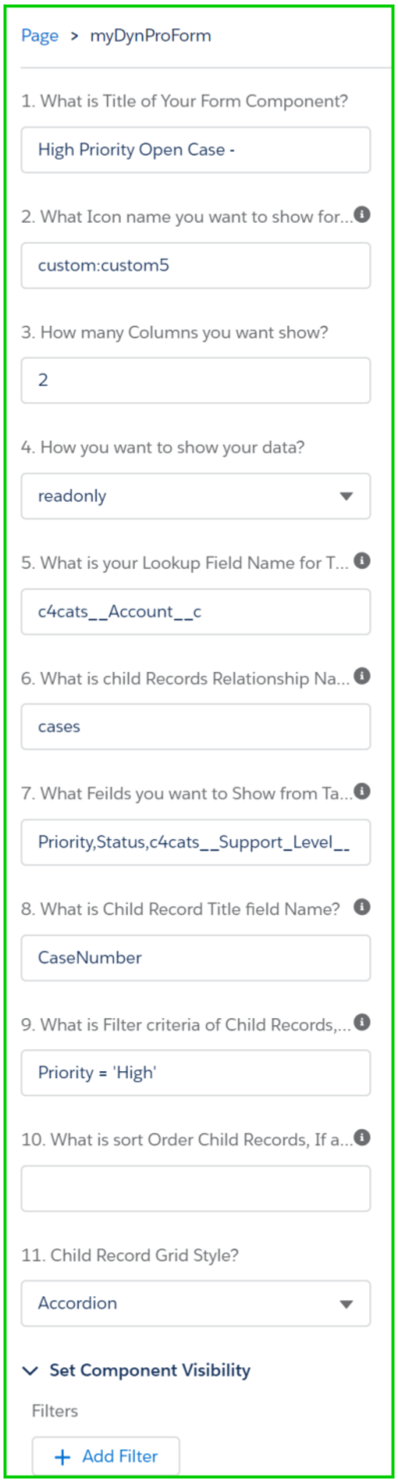
- The Following Business requirement statement will help Admins to Setup Component as needed.
- I want to View(4) two (3) columnar Fields (7) of Parent Account(5) Contacts(6) with filter Condition (9) in Required sort Order (10) in required Style (11) with title (1) & Icon (2)

1. Setup Screen Sample



4.2. Samples

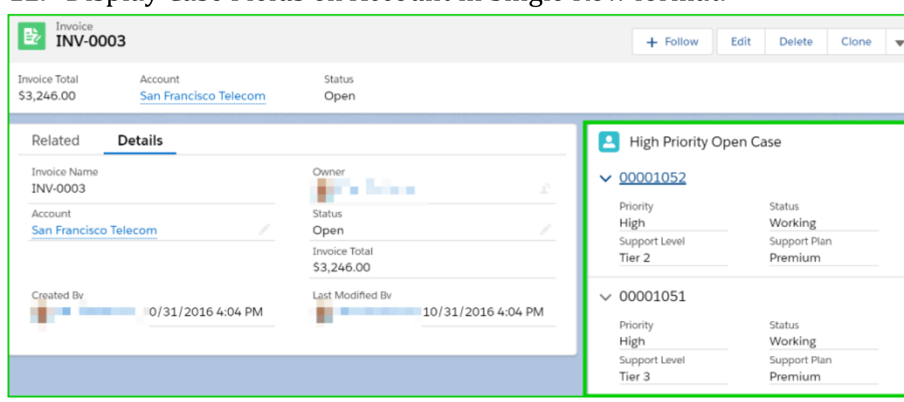
#1 – Complete form to display Cases on an Invoice Lightning Page



Example 1 –
Display Cases fields on Invoice page

Component Parameters:

1. High Priority Open Cases
2. custom:custom7
3. 6
4. View
5. AccountID
6. Cases
7. Active__c,Type,AmountClosedthisYear__c,AnnualRevenue,Customer Priority__c,SLA__c
8. CaseNumber
9. LEAVE BLANK
10. LEAVE BLANK
11. Accordion
12. Display Case Fields on Account in Single Row format.



Example 2 –
Display Account fields on Contact page

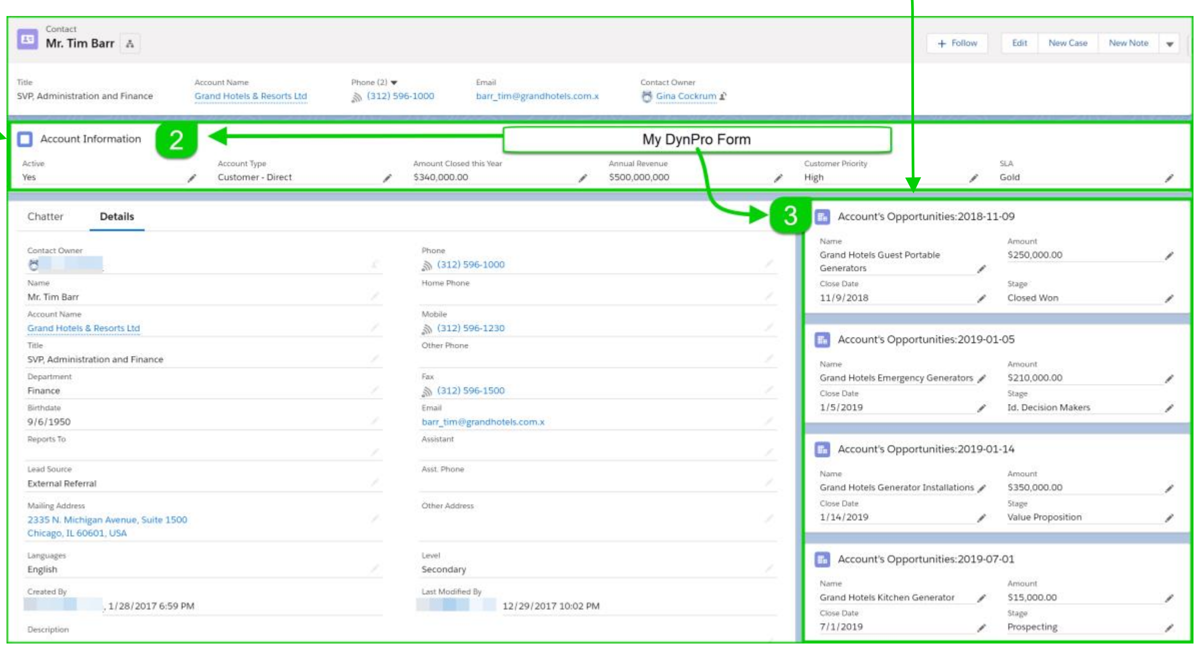
Component Parameters:

1. Account Information
2. custom:custom7
3. 6
4. View
5. AccountID
6. LEAVE BLANK
7. Active__c,Type,AmountClosedthisYear__c,AnnualRevenue,CustomerPriority__c,SLA__c
8. Name
9. AccountId__r
10. LEAVE BLANK
11. Tab
12. Display Account Field on Contact in Single Row format.

Example 3 –
Display related Opportunities by Closed Date on a Contact Page

Component Parameters:

1. Account's Opportunities
2. standard:opportunity
3. 2
4. View
5. AccountId
6. Opportunities
7. Name,Amount,CloseDate,StageName,CloseDate
8. CloseDate
9. CloseDate > Today
10. CloseDate
11. Stack
12. Display Opportunities of Account by Close Date in Stackable format.



Example 4 – Show CPQ (Managed Package) Non Accepted Quote's For the Same Account on CPQ Quote **Component Parameter:** 1. Other Quotes in Process 2. custom:custom2 3. 2 4. View 5. SBQQ__Account__c 6. SBQQ__Quotes__r 7. Name, SBQQ__Status__c, SBQQ__Primary__c, SBQQ__SalesRep__c, SBQQ__PrimaryContact__c 8. Name 9. SBQQ__Status__c != 'Accepted' 10. SBQQ__StartDate__c, SBQQ__Status__c 11. Stack 12. Show Un-Accepted Quotes of the same Account on CPQ Quote .	**Example 5 –** Show Open Cases from Grand Parent Child Account's Contacts 3 per page. **Component Parameter:** 1. Parents Cases 2. standard:case 3. 2 4. View 5. grandparentid__c 6. ChildAccounts;Contacts;Cases 7. CaseNumber,Status,Priority 8. CaseNumber 9. Status != 'Closed' 10. CreatedDate desc, Priority 11. Stack 12. Show Grand Parent Account All Child Accounts Contact's Cases that Not Closed by Created Date in Descending Order . **<u>Mata data Setup</u>**: Add myDynProSetup record with Label and Assign Records Per Page value to '3'.
Example 6 – Show Map of All Contacts of Grand Parent Accounts. **Component Parameter:** 1) Parents Contacts 2) standard:contact 3) 2 4) View 5) grandparentid__c 6) ChildAccounts;Contacts 7) Name,MailingStreet,MailingCity, MailingState, MailingPostalCode, MailingCountry 8) Name 9) 10) 11) Map 12) Show Map of All Contacts of Grand Parent Accounts.	**Example 7 –** Show Grid of All Contact's Open Cases of Grand Parent Accounts with Latest Cases on Top w/Auto Refresh . **Component Parameter:** 1) Parents Contacts Cases 2) standard:case 3) 6 4) ReadOnly 5) grandparentid__c 6) ChildAccounts;Contacts;Cases 7) CaseNumber, Origin, Reason, ClosedDate, Priority, Subject 8) CaseNumber 9) Status <> 'Open' 10) ClosedDate Desc 11) Grid 12) Show All Contact's Open Cases of Grand Parent Accounts with Latest Cases on Top. **<u>Mata data Setup</u>**: Add myDynProSetup record with Label and Assign Auto Refresh Minutes.

5. Support

aDynPro Team has dedicated to support all the Customers to best use of this myDynPro Pack. Please reach aDynPro Support Team adik@adynpro.com for any questions or any help need to Setup.

5.1.1. Setup first in Sandbox and Test it before deploy to Production

5.1.2. Customer is responsible to setup the Component as per their requirements.

5.1.3. aDynPro support team can help to give tips on how it can be used, but not able to setup for customer in their org.

5.1.4.

Einstein call failed with HTTP 403 Forbidden [{"message":"This feature is not currently enabled for this user.","errorCode":"FUNCTIONALITY_NOT_ENABLED"}]