SELECTit

User Guide

Everyone's Platform Ltd

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Introduction

SELECTit is a powerful, 100% native Salesforce application that eliminates the need for admin and development resources to create customized record selections for end users. It empowers business users to perform complex data management tasks through simple point-and-click configurations.

This guide provides comprehensive instructions for using SELECTit's Record Management Engine to search, import, update, create, delete, attach files to, and export Salesforce records.

Throughout this guide, we use a hypothetical security company - SecurityCo - to demonstrate how SELECTit solves real-world data management challenges in Salesforce.

Note: The screenshots in this document are for illustration purposes. Your actual interface may vary slightly depending on your Salesforce configuration.

Chapter 1

Key Features

1.1 Lightning Record Management Engine

SELECTit provides a modern Lightning Web Component interface for all record management operations:

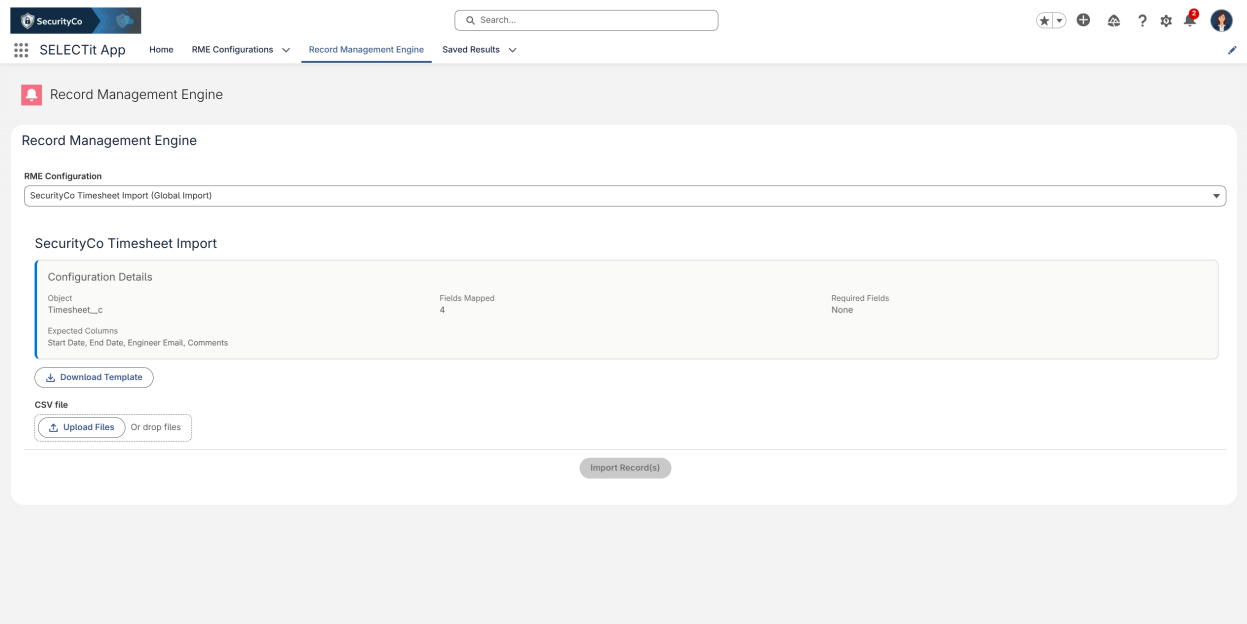

Figure 1.1: The Lightning Record Management Engine interface showing the configuration selector, search filters, additional criteria options, and operation tabs

Key Features:

- **Unified Search Interface** - Search across any Salesforce object with dynamic filters based on your RME Configuration
- **Type-Aware Filtering** - Smart filter inputs that adapt to field types (picklists, dates, numbers, booleans)
- **Quick Filters & Advanced Filters** - Top 3 filters shown prominently with expandable advanced filter section
- **Active Filter Pills** - Visual indicators showing currently applied filters with one-click removal
- **Real-Time Results** - Lightning datatable with inline selection, sorting, and record hyperlinks

- **Saved Selections** - Save and reload record selections for future use
- **Tab-Based Operations** - Easy access to Update, Create, Delete, Attach, and Export operations

1.2 RME Configuration Wizard

A guided 3-step wizard for creating and editing RME Configurations:

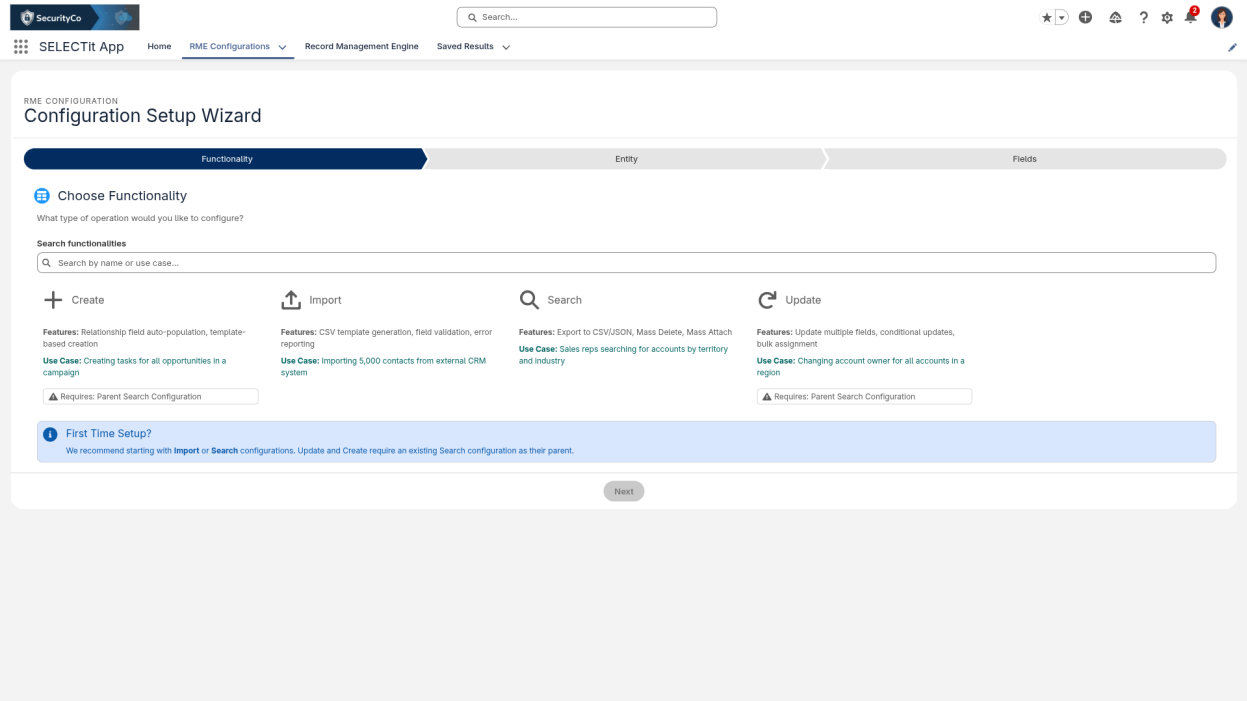

Figure 1.2: Configuration Wizard showing functionality selection with visual cards for Create, Import, Search, and Update operations

Wizard Steps:

1. **Functionality Selection** - Choose the operation type with visual cards
2. **Entity Configuration** - Select the target Salesforce object with autocomplete search
3. **Field Specification** - Configure fields with an intuitive field selector

1.3 Enhanced Import Capabilities

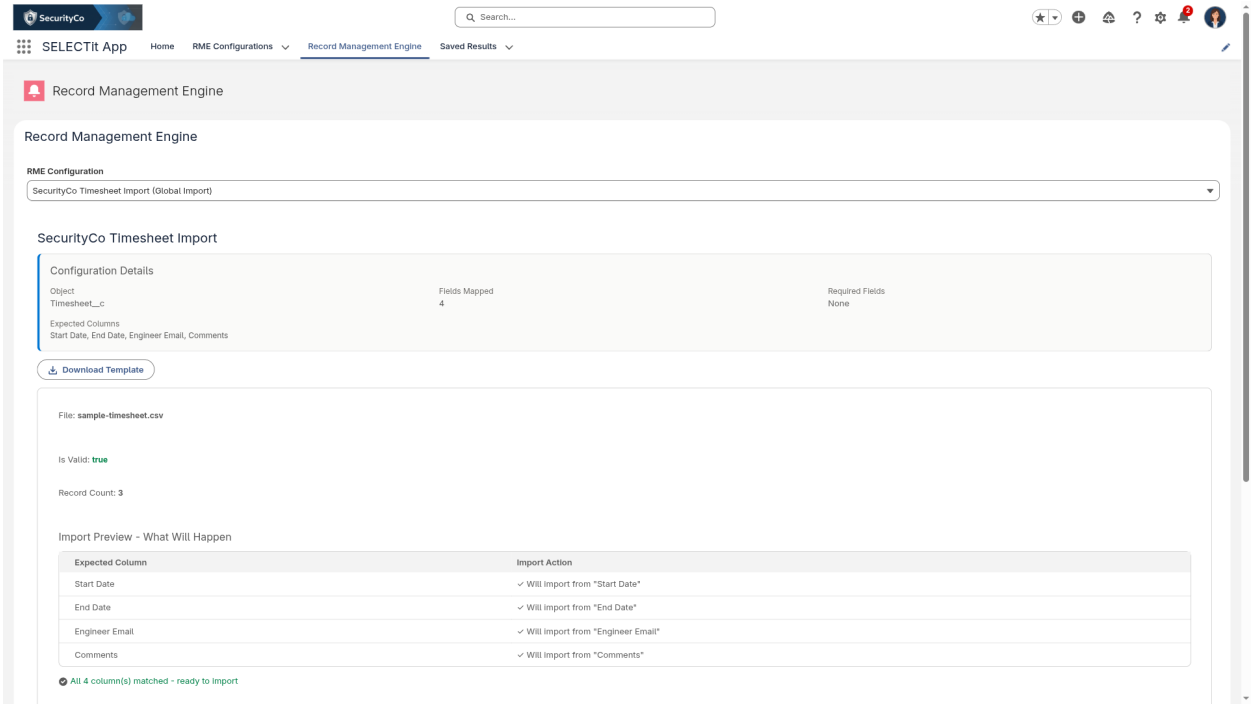

Figure 1.3: Column mapping validation showing configuration details, import preview with expected columns and actions, and data quality check results

Import Features:

- **Column Mapping Validation** - Visual display of how CSV columns map to configured fields
- **Missing Column Detection** - Clear warnings for required fields not present in the CSV
- **Data Quality Preview** - Sample validation of first 100 rows before full import
- **Progress Tracking** - Real-time progress indicators during import processing
- **Error File Generation** - Automatic CSV file with failed rows and detailed error messages

1.4 Adaptive Processing

By default, all imports and exports use Apex Batch processing regardless of record count. This preserves sequential record ordering, which is important for templates that create parent records before child records (e.g. creating a task before attaching a child task to it).

To enable faster processing for small datasets, check **Use Adaptive Processing** on the RME Configuration. When enabled, the system automatically selects the optimal execution strategy:

Record Count	Strategy	Behaviour
1-200	**Synchronous**	Immediate processing with instant results
201-2,000	**Queueable**	Single async job, faster startup than batch
2,001+	**Batch**	Chunked processing for large datasets

When **Use Adaptive Processing** is disabled (the default), the **Batch Process Records No** field controls how many records are processed per batch. This is useful for fine-tuning performance or ensuring strict sequential processing.

1.5 Progress Tracking

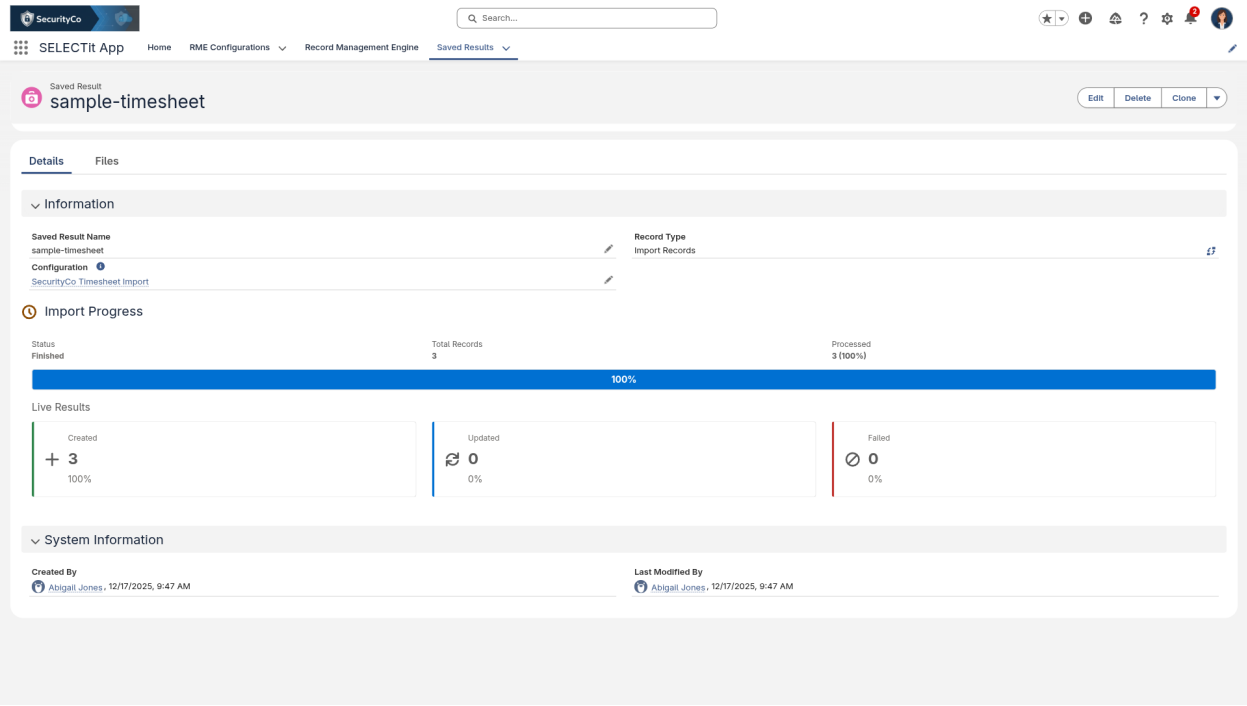

Figure 1.4: Progress tracking showing status, total records, processed count with percentage, and live results

Progress Features:

- Progress percentage and record count
- Processing status updates (Queued, In Progress, Finished, Failed)
- Direct download link when complete
- Auto-refresh capability

Chapter 2

Terminology

2.1 RME Configuration

The part of SELECTit that defines the data and functionality to be made available to end users. These configurations are created by Salesforce admins through a point-and-click UI, respecting the security model of Salesforce.

2.2 Entity Field Specification

Each RME Configuration contains multiple entity field specifications that define the fields available in each functionality. For example, you can define the 'Name' field (entity field specification) on Account (entity) to be available as a search criteria in a Global Search (functionality).

SELECTit supports browsing and selecting fields from parent objects (e.g., `Account.Owner.Email`) using the field specification wizard.

2.3 Record Management Engine

The part of SELECTit that changes records inside Salesforce. End users select a configuration template that admins have created for them (e.g., Global Search) and then use the defined functionality to carry out their Salesforce record management tasks.

The Record Management Engine provides a modern Lightning interface with tab-based operations and real-time results.

Chapter 3

Example Company Scenario

SecurityCo is a global security firm providing alarms to businesses and households. SecurityCo uses Salesforce to manage its Sales, Marketing and HR business processes.

Throughout this document, we'll demonstrate how SecurityCo uses SELECTit to:

- **Import timesheets** from regional offices via CSV files
- **Search for engineers** based on location and skills
- **Create attendance records** for training events across multiple engineers
- **Update customer records** when support contacts change
- **Attach incident documents** to affected customer records
- **Delete archived data** on a scheduled basis
- **Export engineer data** for reporting purposes

Chapter 4

Global Import - Importing CSV Files Within Salesforce

SecurityCo uses third-party contractors to perform maintenance for its alarms on a regional basis. Each month, the SecurityCo regional offices submit spreadsheets documenting hours worked by contractors to SecurityCo Head Office for billing and payment.

SecurityCo needs a simple solution to import timesheet data into Salesforce without demanding regional offices use technical tools like Data Loader. SELECTit provides this capability.

4.1 Global Import Configuration

In order to access the import functionality of SELECTit, admins must create an RME Configuration for the end user. The RME Configuration defines:

- **Entity** - The subject of the import (e.g., Timesheet)
- **Entity Field Specifications** - The fields that can be imported (columns in the CSV file)
- **Published Status** - Whether the configuration is accessible to end users

4.1.1 Creating an Import Configuration

To create a new Global Import configuration using the Configuration Wizard:

1. Navigate to **RME Configurations** tab
2. Click **New** to open the Configuration Wizard
3. Select **Import** as the functionality
4. Search and select the target entity (e.g., Timesheet)
5. Click **Save and Continue**
6. Add the required fields for import using the field selector
7. Set the **Publish Status** to "Published" when ready

4.2 Using the Record Management Engine for Import

Users can import CSV files through either the Record Management Engine tab or the dedicated Global Import component.

4.2.1 Using the Record Management Engine Tab

1. Navigate to the **Record Management Engine** tab in the SELECTit app

2. Select your Import configuration from the dropdown
3. The Import interface will display with template download and file upload options

4.2.2 Using the Global Import Component

The Global Import component can be added to any Lightning page or Community page using Lightning App Builder:

1. Edit the page in Lightning App Builder
2. Search for "Global Import Widget" in the Components panel
3. Drag the component onto the page
4. Configure the RME Enterprise Id property
5. Save and activate the page

4.3 Import Workflow

4.3.1 Step 1: Download Import Template

Click **Download Template** to generate an empty CSV file with the correct column headers based on your configuration.

Example template for timesheet import:

```
StartDate,EndDate,EngineerEmail,Comments
```

4.3.2 Step 2: Prepare Your Data

Fill in the template with your data:

```
StartDate,EndDate,EngineerEmail,Comments
11/28/2024 10:00,11/28/2024 18:00,james.butt@securityco.com,ABC Customer Maintenance
11/29/2024 09:00,11/29/2024 17:00,jane.doe@securityco.com,XYZ Site Installation
```

4.3.3 Step 3: Upload and Validate

1. Click **Choose File** and select your CSV file
2. Click **Validate Record(s)**

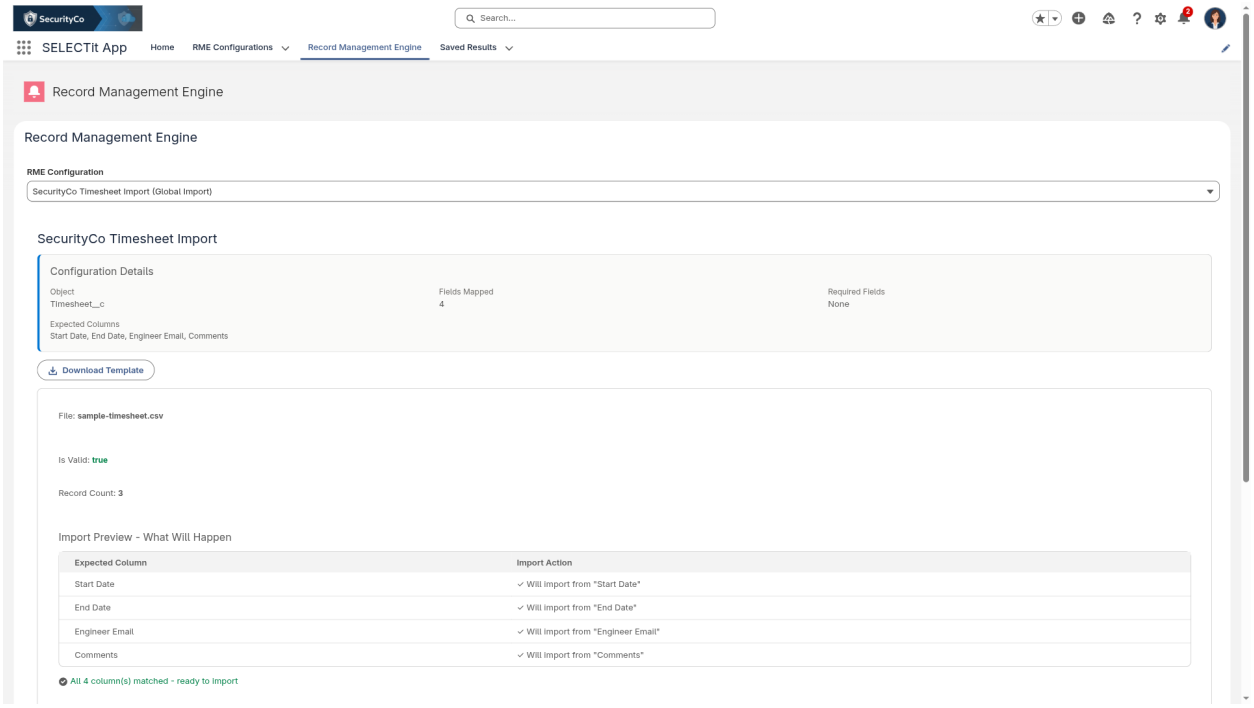

Figure 4.1: Column mapping validation showing matched columns with checkmarks, import actions, and data quality summary

Column Mapping Validation displays:

- **Green checkmarks** for matched columns
- **Yellow warnings** for optional missing columns
- **Red alerts** for required missing columns
- **Estimated success/skip counts** based on sample validation

4.3.4 Step 4: Import Records

Once validation passes, click **Import Record(s)** to begin the import process.

Processing:

By default, all imports use Apex Batch processing. If **Use Adaptive Processing** is enabled on the configuration, small files are processed faster:

- Small files (1-200 records): Processed immediately
- Medium files (201-2,000 records): Uses Queueable for faster processing
- Large files (2,001+ records): Uses Batch processing

4.4 Import Progress Tracking

The Import Progress page provides real-time information:

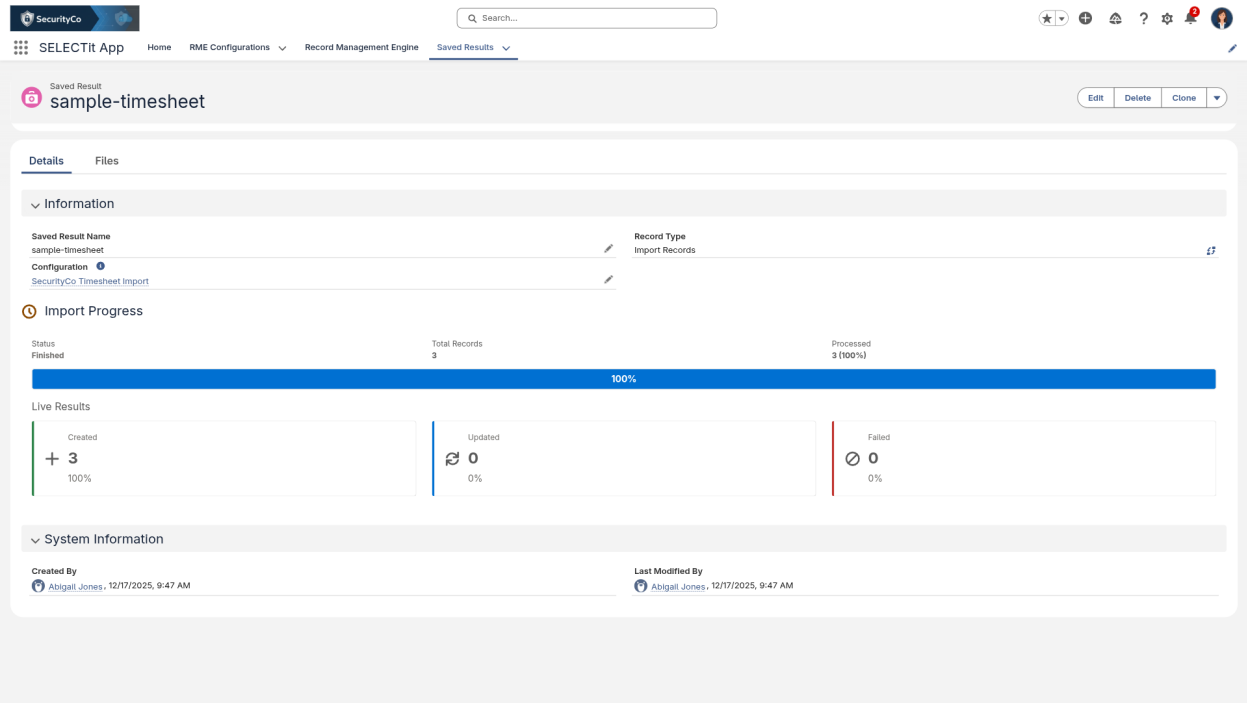

Figure 4.2: Import progress tracking with status indicator, progress bar, record counts, and live results

Progress Information:

- **Processing Status** - Queued, In Progress, Finished, or Failed
- **Progress Bar** - Visual percentage complete
- **Record Counts** - Total, Created, Updated, and Failed records
- **Error File** - Download CSV containing failed rows with error details

4.5 Configuration Options

Field	Description
Use Adaptive Processing	When enabled, small imports use synchronous or queueable processing for faster results. When disabled (default), all imports use Apex Batch, preserving sequential record ordering.
Batch Process Records No	Number of records processed in each batch (default: 100). Only applies when Use Adaptive Processing is disabled.
Ignore Null Values	When checked, import ignores empty cells unless they match the Null Value Indicator
Null Value Indicator	Special value that represents intentional null (e.g., "#NULL#")
Use Advanced Blob Converter	Enable for complex character encoding scenarios

4.6 Import Tips

1. **Use the generated template** - This ensures column headers match exactly
2. **Validate first** - Always validate before importing to catch errors early
3. **Check the error file** - If records fail, download the error CSV to see specific issues
4. **Use lookup fields wisely** - Reference related records by their external ID or unique identifier

Chapter 5

Global Search - Finding Records to Manage

Global Search provides users with an interface to search for the records they want to manage. Search forms the foundation of SELECTit because it is from search that records are found to which other functionalities - such as update, delete, and export - are then applied.

5.1 Global Search Configuration

1. Navigate to **RME Configurations** tab
2. Click **New** to open the Configuration Wizard
3. Select **Search** as the functionality
4. Search and select the target entity (e.g., Engineer)
5. Enter configuration details:
   - **RME Configuration Name** - Descriptive name (e.g., "Engineer Search")
   - **Enterprise Id** - Unique identifier for URL parameters
   - **Enable Export** - Check to allow exporting results
   - **Enable Mass Delete** - Check to allow deleting selected records
   - **Enable Mass Attach** - Check to allow attaching files
6. Click **Save and Continue**
7. Configure Entity Field Specifications

5.2 Entity Field Specification Options

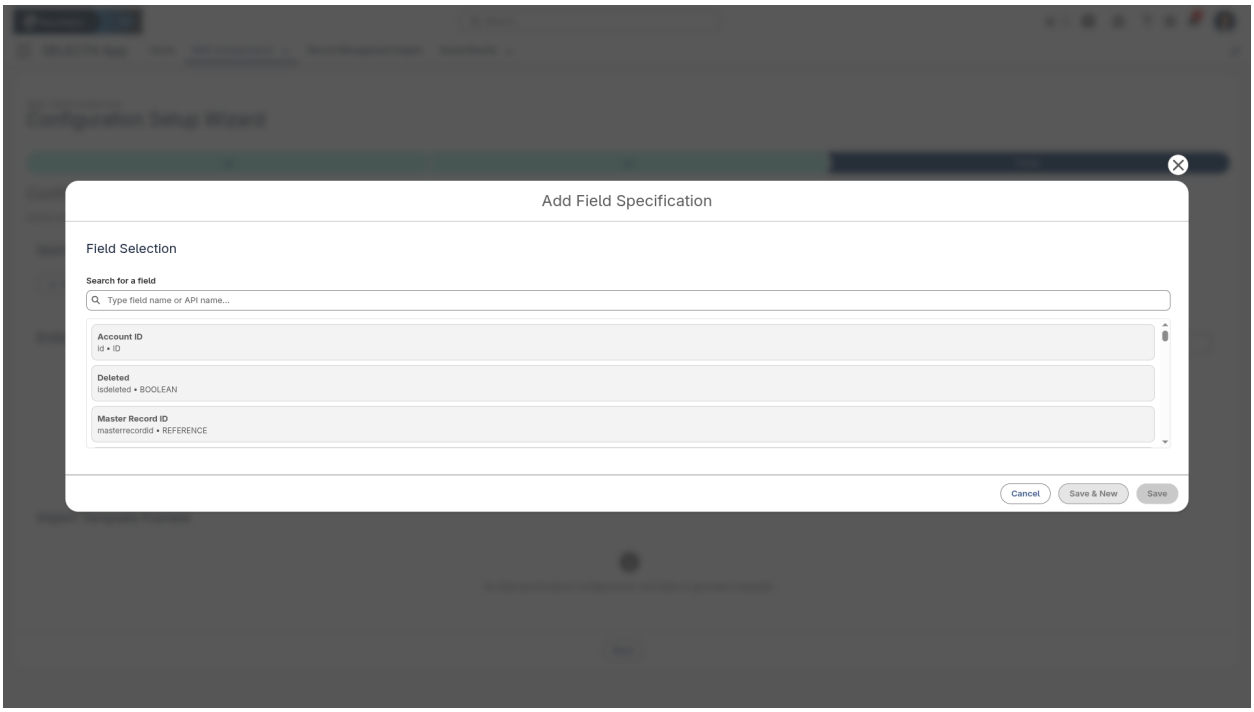

Figure 5.1: Add Field Specification modal showing field selection with search, field list displaying API name and type

For each field, you can configure:

Option	Description
Used In	View (display in results), Filter (use as search criteria), Query (include in SOQL)
Default Search Filter	Default comparison operator (equals, contains, starts with, etc.)
Default Value	Pre-populated filter value
Default Apply Value	When checked, this filter is automatically applied on page load
Hide	Hide from user interface but still include in queries
Use For Hyperlink	Make this field a clickable link to the record
Export To Column	Column name in exported files

5.3 Parent Field Support

You can access fields from parent objects in your configurations:

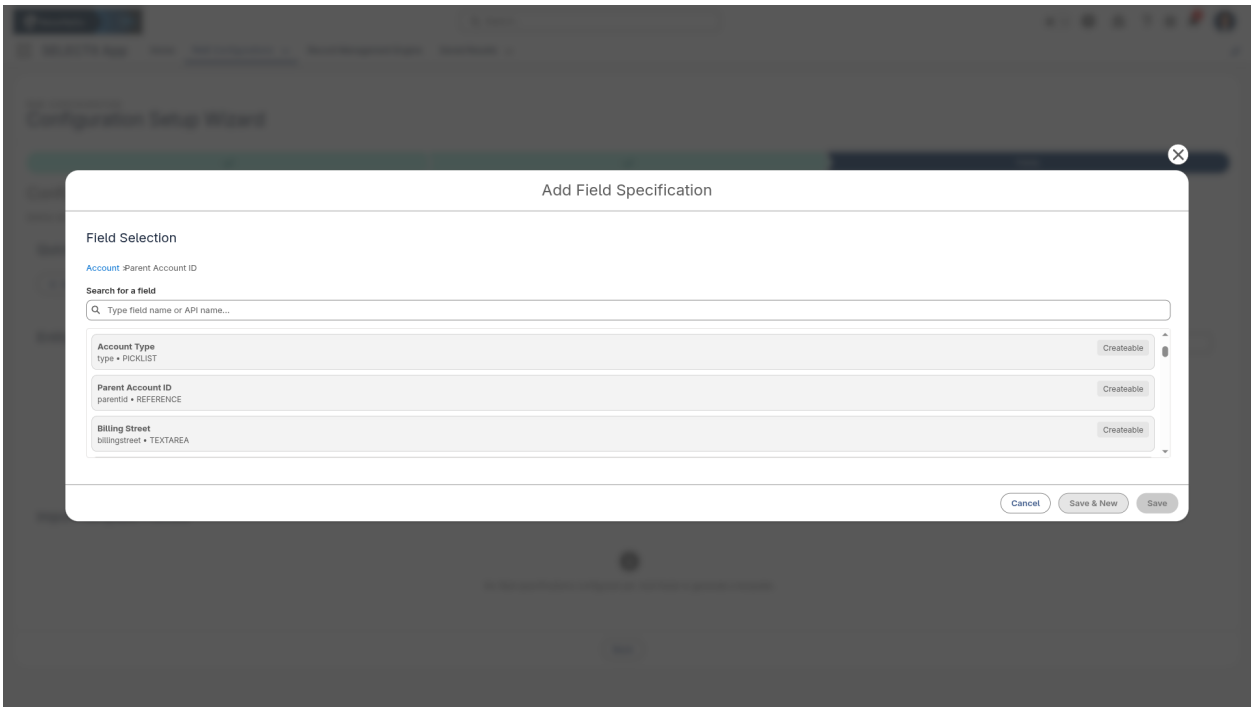

Figure 5.2: Parent field browser showing breadcrumb navigation with available fields from the parent object

To add a parent field:

1. In the field selector, click on a reference field to navigate into it
2. Breadcrumbs show your current path (e.g., Account > Parent Account ID)
3. Select the desired parent field
4. The field path will be automatically constructed (e.g., `ParentId.Type`)

5.4 Using Global Search in the Record Management Engine

The Lightning Record Management Engine provides a modern search experience:

5.4.1 Accessing the Search Interface

1. Navigate to the **Record Management Engine** tab
2. Select your Global Search configuration from the dropdown
3. Or click **Preview RME** from any RME Configuration record

5.4.2 Using the Add Filter Button

Click + **Add Filter** to add search criteria. Each filter allows you to:

- Select a field from your configured fields
- Choose a comparison operator
- Enter a value
- Toggle whether to apply the filter

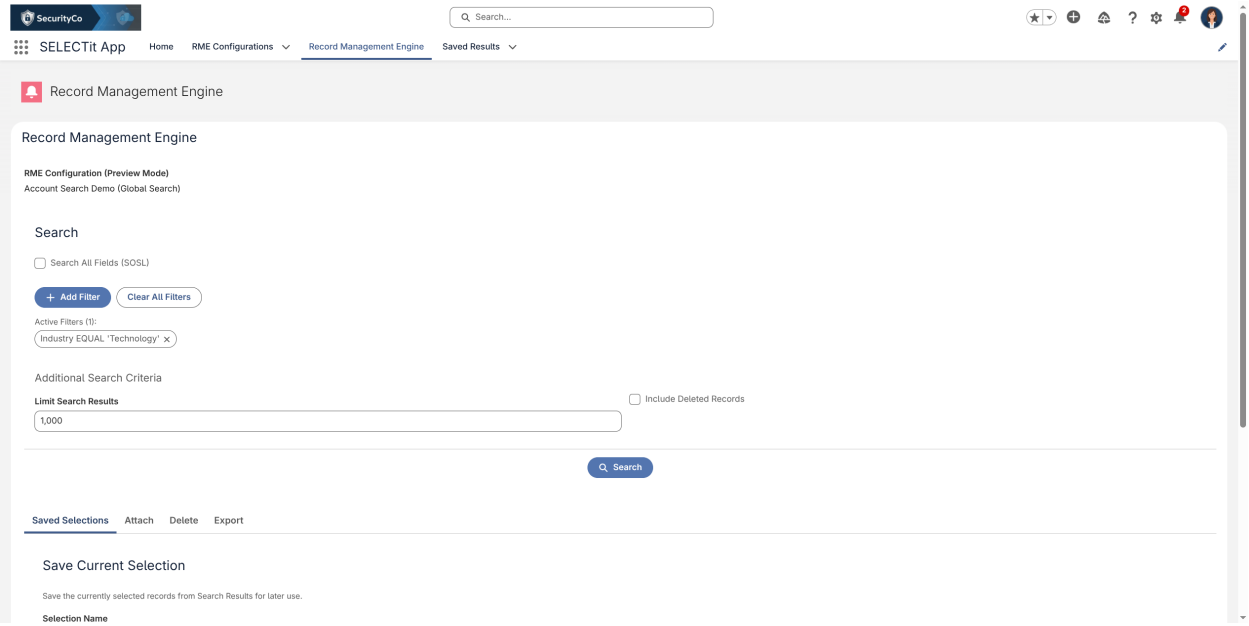

Figure 5.3: Active filter pills showing applied filters with one-click removal

Filter Pills: Applied filters appear as pills above the search results, allowing quick review and one-click removal by clicking the X icon.

5.4.3 Search Results

Results appear in a modern Lightning datatable:

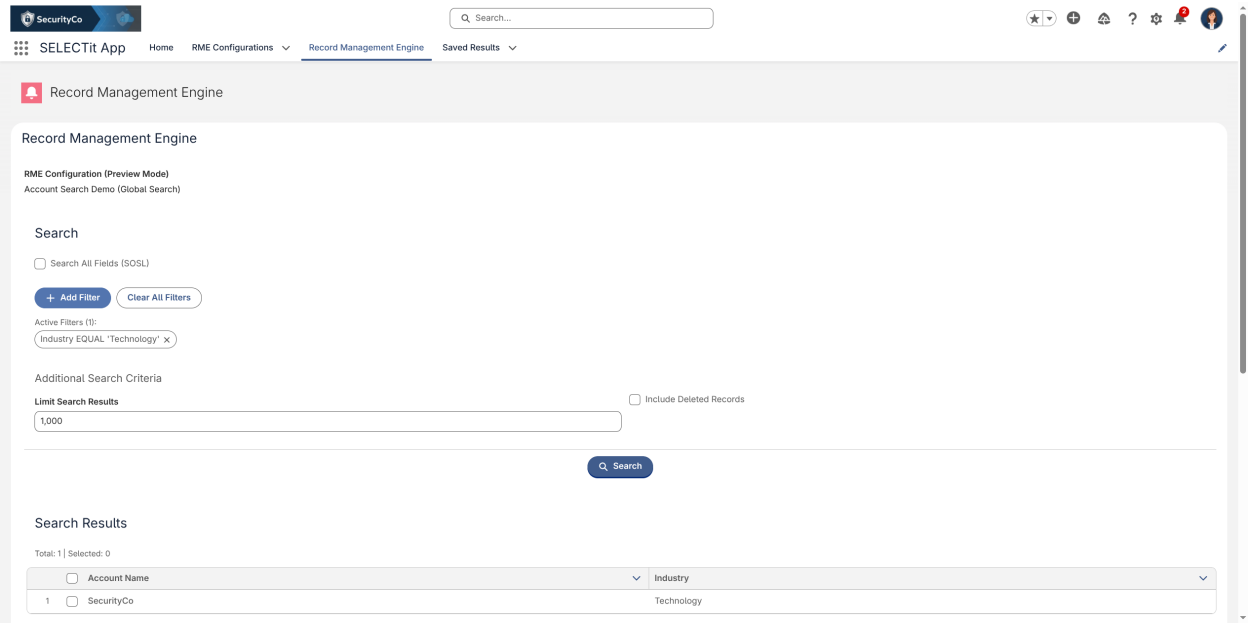

Figure 5.4: Search results showing total count, sortable columns, row selection checkboxes, and data rows

Results Features:

- **Sortable columns** - Click column headers to sort
- **Record links** - Fields configured as hyperlinks open the record
- **Inline selection** - Checkboxes to select individual records
- **Select All** - Checkbox in header to select all visible records
- **Pagination** - Navigate through large result sets

5.4.4 Working with Selected Records

Once you have records selected, use the operation tabs at the bottom:

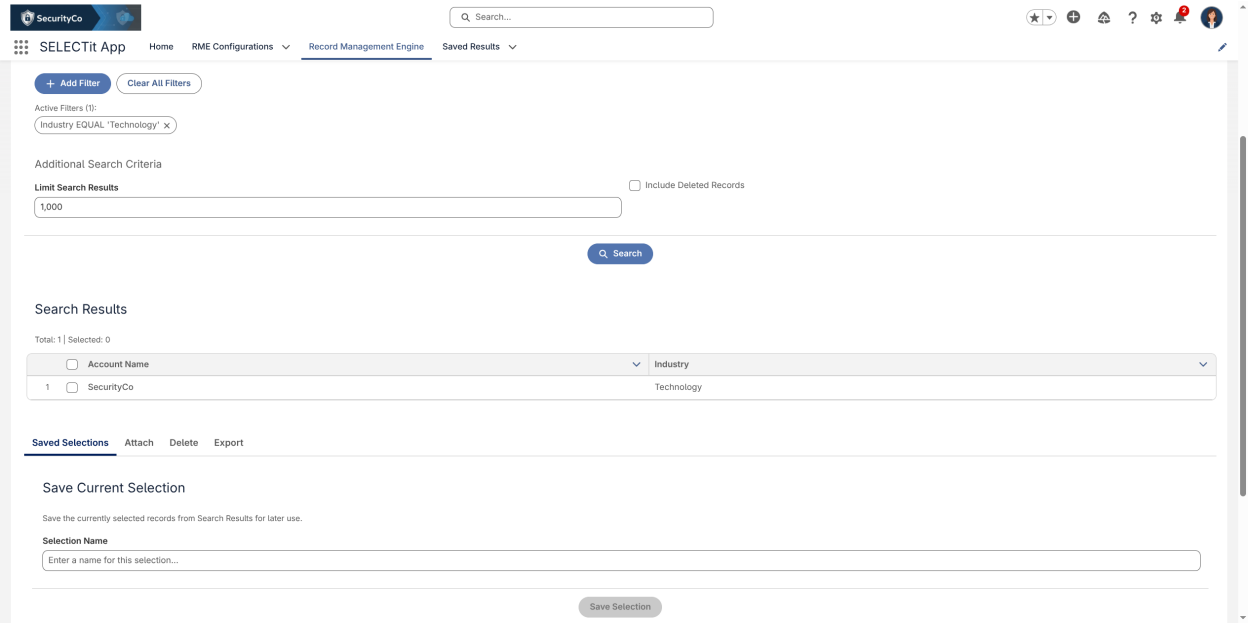

Figure 5.5: Complete Record Management Engine interface showing search results, Saved Selections tab, and Export tab

Available Operations:

- **Saved Selections** - Save current selection or load a previous one
- **Export** - Export selected records to CSV or JSON

Additional tabs appear based on your configuration:

- **Update** - Mass update field values (requires Global Update config)
- **Create** - Create related child records (requires Global Create config)
- **Attach** - Attach files to all selected records
- **Delete** - Delete all selected records

5.5 URL Parameters for Dynamic Filtering

Global Search accepts dynamic filter values via URL parameters:

`/lightning/n/selectit__Record_Management_Engine?c__id=CONFIG_ID&c__FIELD_ENTERPRISE_ID=VALUE`

Example: Pre-filter engineers by region:

`?c__id=a0B5e00000ABC123&c__region=New York`

5.6 Search Options

Option	Description
Limit Search Results to	Maximum number of records to return (default: 1000)
Include Deleted Record(s)	Include records in the recycle bin
Search All Fields (SOSL)	Perform SOSL full-text search across all fields
Auto Select Search Results	Automatically add all results to Record Selection

Chapter 6

Global Create - Creating New Records for Multiple Parent Records

SecurityCo rewards engineers for the number of professional training (PT) events they complete each year. Regional teams need to create the same PT event record for multiple engineers attending it.

6.1 Global Create Configuration

Global Create requires a parent Global Search configuration to find the records for which child records will be created.

1. Navigate to **RME Configurations** tab
2. Click **New** to open the Configuration Wizard
3. Select **Create** as the functionality
4. Select the **Global Search** configuration that will find parent records
5. Select the **Entity** to create (e.g., Attendance)
6. Enter configuration details
7. Click **Save and Continue**
8. Add fields that users will populate when creating records

6.2 Using Global Create in the Record Management Engine

6.2.1 Step 1: Select Parent Records

1. Open the Global Create configuration in the Record Management Engine
2. Use the search filters to find parent records (e.g., engineers in New York)
3. Select the records for which you want to create child records
4. Records appear in the search results

6.2.2 Step 2: Configure Child Records

1. Navigate to the **Create** operation section
2. You'll see the fields configured for the child entity
3. Enter the values for the new records (e.g., Event = "Platform Training 2024", Status = "Registered")

6.2.3 Step 3: Create Records

1. Click **Create New Record(s)**

2. SELECTit creates one child record for each selected parent
3. Results display showing success/failure counts

6.3 Use Cases

- Create attendance records for multiple engineers attending the same training
- Add the same task to multiple accounts
- Create contact records for multiple accounts
- Add notes to multiple cases

Chapter 7

Global Update - Updating Multiple Records

Every SecurityCo customer has a designated alarm support contact assigned to them. When a support contact changes, the regional team needs to update all affected customer records with the new contact details.

7.1 Global Update Configuration

Global Update requires a parent Global Search configuration.

1. Navigate to **RME Configurations** tab
2. Click **New** to open the Configuration Wizard
3. Select **Update** as the functionality
4. Select the **Global Search** configuration that will find records to update
5. Enter configuration details
6. Click **Save and Continue**
7. Add fields that users can update (uses parent's entity field specifications)

7.2 Using Global Update in the Record Management Engine

7.2.1 Step 1: Select Records to Update

1. Open the Global Update configuration in the Record Management Engine
2. Search for records that need updating
3. Select records from the search results

7.2.2 Step 2: Choose Fields to Update

1. Navigate to the **Update** operation section
2. Select which fields you want to update from the available list
3. The selected fields will display input controls

7.2.3 Step 3: Enter New Values and Update

1. Enter the new values for each field
2. Click **Update Selected Record(s)**
3. Results display showing how many records were updated

7.3 Batch Processing

By default, all updates use Apex Batch processing. If **Use Adaptive Processing** is enabled on the parent Global Search configuration:

- 1-200 records: Immediate synchronous update
- 201+ records: Background processing with progress tracking

Chapter 8

Global Attach - Attaching Files to Multiple Records

When SecurityCo has a service outage in a region, they need to attach an incident document to all affected customer records.

8.1 Global Attach Configuration

Global Attach uses Global Search configurations - no separate configuration needed. Simply enable **Enable Mass Attach** on your Global Search configuration.

8.2 Using Global Attach in the Record Management Engine

8.2.1 Step 1: Select Records

1. Open a Global Search configuration with Mass Attach enabled
2. Search for and select the records that need the attachment
3. Selected records appear in search results

8.2.2 Step 2: Upload and Attach

1. Navigate to the **Attach** operation section
2. Click **Choose File** and select the file to attach
3. Click **Attach File to Record Selection**

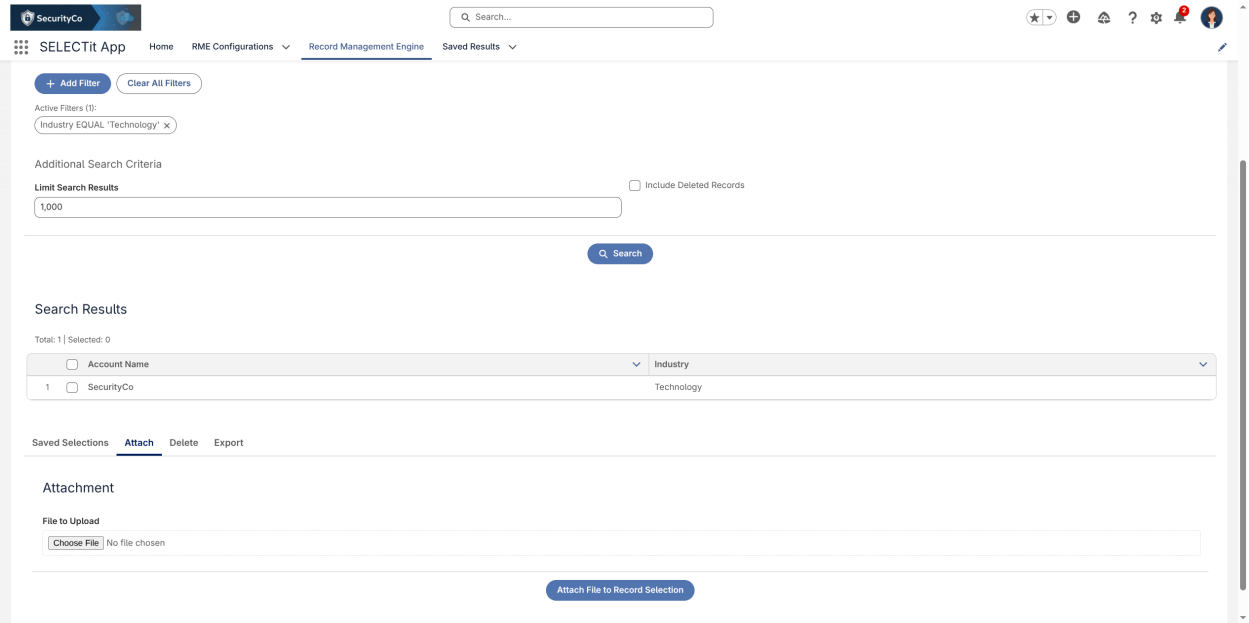

Figure 8.1: Attach operation interface showing file upload control and attach button

8.3 File Storage

Files are attached using Salesforce's ContentDocument model:

- Files appear in the Files related list on each record
- Same file is linked to multiple records (not duplicated)
- Supports all standard file types

Chapter 9

Global Delete - Mass Delete Records

SecurityCo needs to delete all archived customer data within Salesforce every six months.

9.1 Global Delete Configuration

Global Delete uses Global Search configurations - no separate configuration needed. Simply enable **Enable Mass Delete** on your Global Search configuration.

Important: Users must have Delete permission on the object in their profile or permission sets.

9.2 Using Global Delete in the Record Management Engine

9.2.1 Step 1: Select Records to Delete

1. Open a Global Search configuration with Mass Delete enabled
2. Search for records to delete (tip: use "Include Deleted Records" to find records already in recycle bin)
3. Select records from search results

9.2.2 Step 2: Confirm and Delete

1. Navigate to the **Delete** operation section
2. Review the warning message
3. Click **Delete Record Selection**
4. Results display showing how many records were deleted

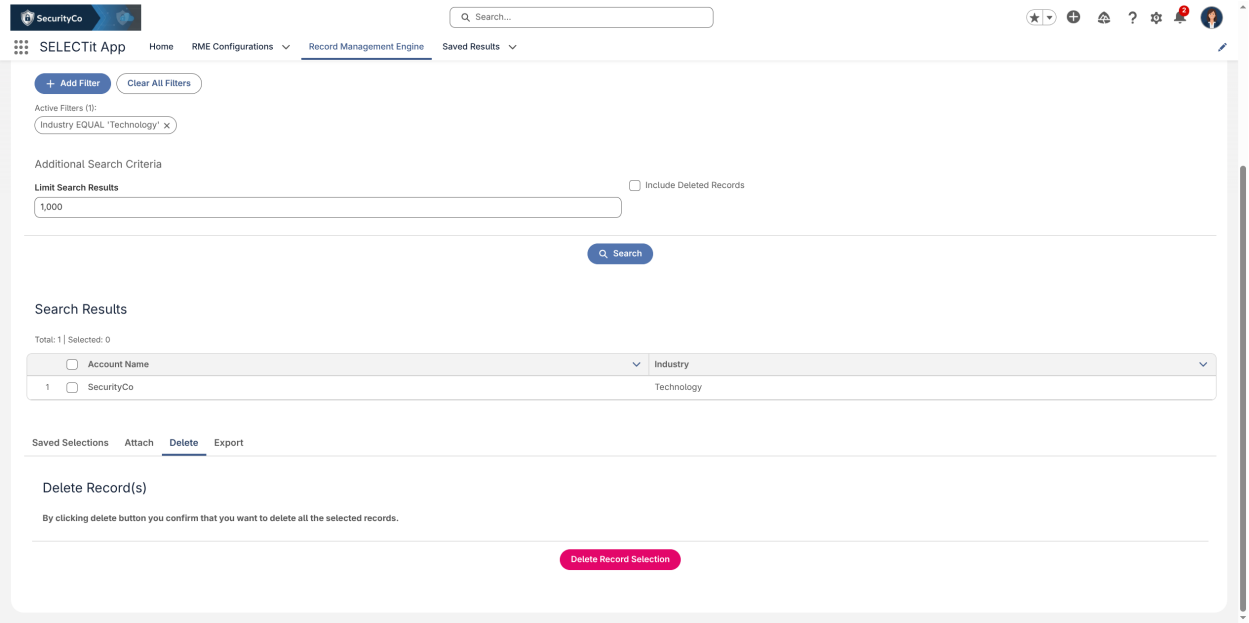

Figure 9.1: Delete operation interface with confirmation message and delete button

9.3 Safety Features

- Deleted records go to the Recycle Bin (can be recovered within 15 days)
- Requires explicit user confirmation
- Only works if user has Delete permission on the object

Chapter 10

Global Export - Exporting Data to CSV or JSON

SecurityCo needs to export engineer data for external reporting and analysis.

10.1 Global Export Configuration

Global Export uses Global Search configurations - no separate configuration needed. Simply enable **Enable Export** on your Global Search configuration.

Configure which fields appear in exports using the **Export To Column** field on each Entity Field Specification.

10.2 Using Global Export in the Record Management Engine

10.2.1 Step 1: Select Records to Export

1. Open a Global Search configuration with Export enabled
2. Search for records to export
3. Select records from search results

10.2.2 Step 2: Configure Export

1. Navigate to the **Export** tab
2. Enter a **File Name** for the export
3. Select **Export Option**: CSV or JSON

10.2.3 Step 3: Export and Download

1. Click **Export Record Selection**
2. For small exports (1-200 records): Download starts immediately
3. For larger exports: You'll see a progress tracker

10.3 Export Progress Tracking

The Export Progress component shows:

- **Status** - Queued, In Progress, Finished, or Failed
- **Progress** - Percentage complete with progress bar

- **Record Count** - Number of records processed
- **Download Link** - Available when export completes
- **Auto-refresh** - Automatically updates status

10.4 Export Limits

- Maximum 50,000 records per export
- Governed by Salesforce iterator limits
- For larger datasets, use multiple filtered exports

Chapter 11

RME Configuration Wizard - Creating Configurations the Easy Way

SELECTit includes a guided wizard for creating and editing RME Configurations, replacing complex traditional forms.

11.1 Accessing the Wizard

- Click **New** on the RME Configurations list view
- Click **Edit** on any existing RME Configuration record (if configured)

11.2 Wizard Steps

11.2.1 Step 1: Functionality Selection

Visual cards display the available functionality types:

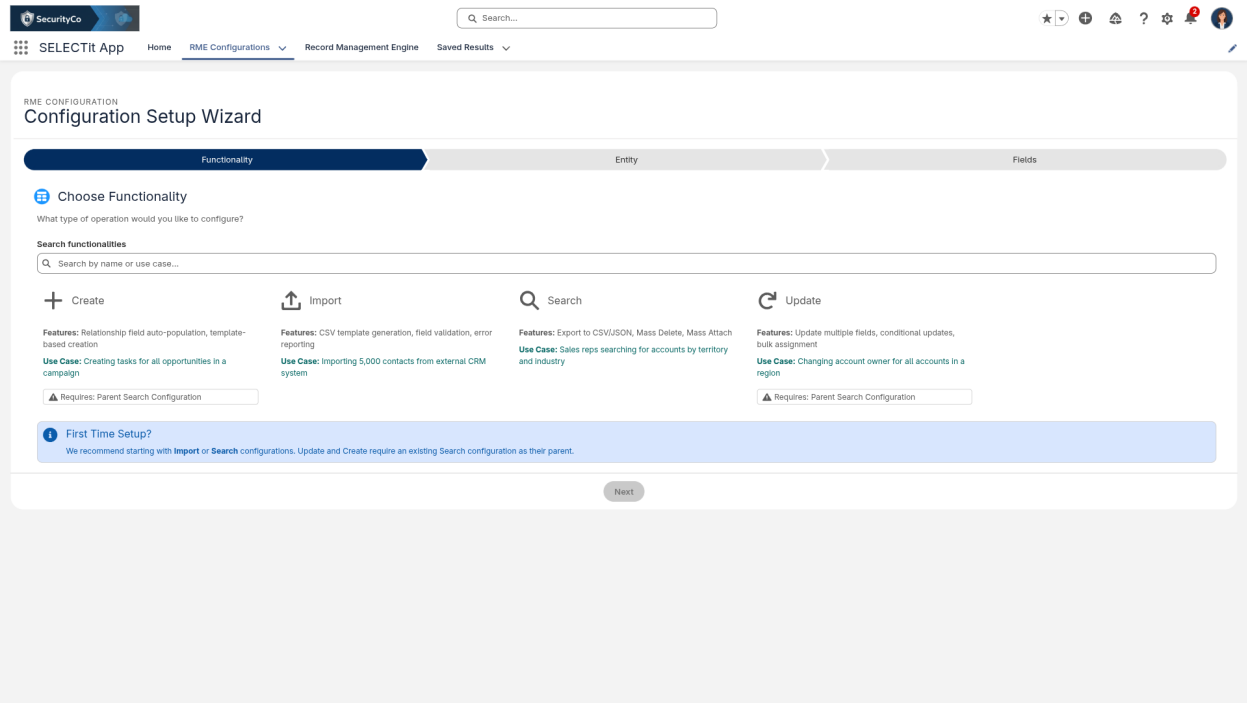

Figure 11.1: Functionality selection showing four operation cards (Create, Import, Search, Update) with features, use cases, and dependency indicators

Functionality	Description
Search	Find and manage records with dynamic filters
Import	Import data from CSV files
Update	Mass update records (requires parent Search)
Create	Create child records for selected parents (requires parent Search)

Select the appropriate functionality for your use case.

Note: Once you select an entity or parent configuration, the functionality type becomes locked and cannot be changed. This ensures data integrity.

11.2.2 Step 2: Entity Configuration

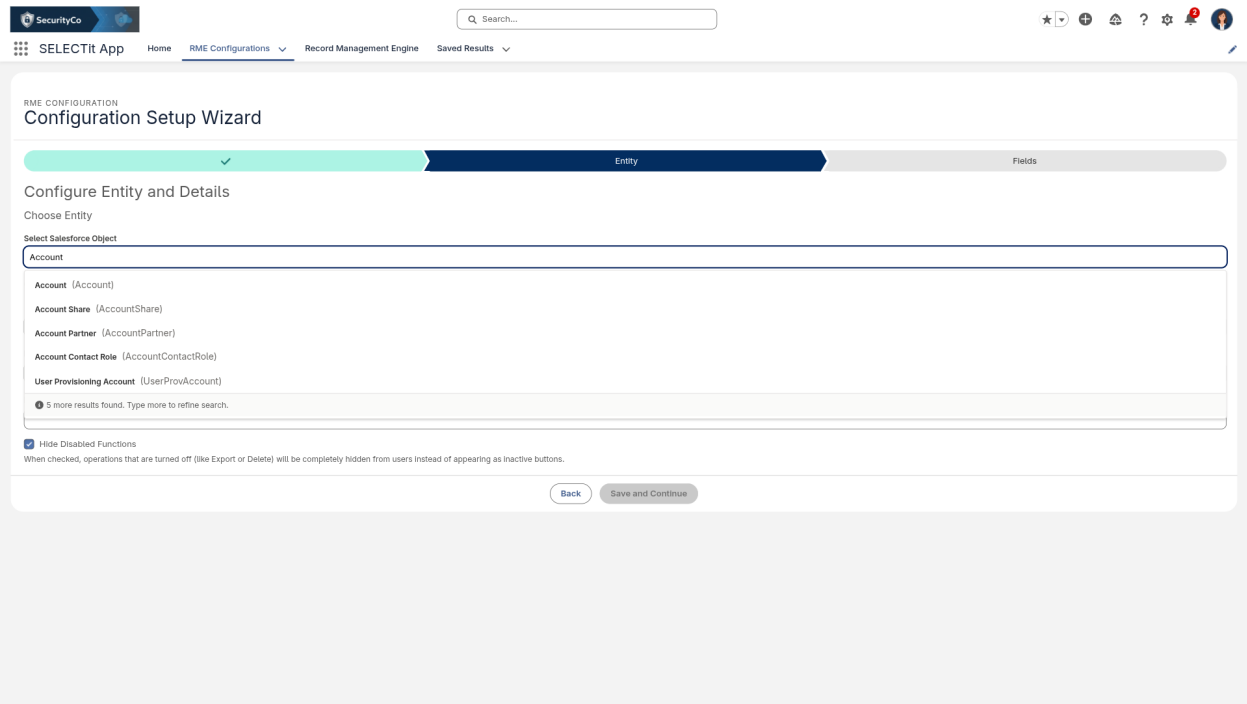

Figure 11.2: Entity selection showing autocomplete search for “Account” with matching results

For Search and Import:

1. Use the autocomplete search to find your target entity
2. Search by object label or API name
3. Select the object from the results

For Update and Create:

1. Select the parent Global Search configuration
2. (Create only) Select the child entity to create

Additional Configuration:

- **RME Configuration Name** - User-friendly name
- **Enterprise Id** - Unique identifier for integrations
- **Publish Status** - Draft or Published
- **Hide Disabled Functions** - Hide unavailable operations from users

11.2.3 Step 3: Field Specification

Add and configure the fields for your configuration:

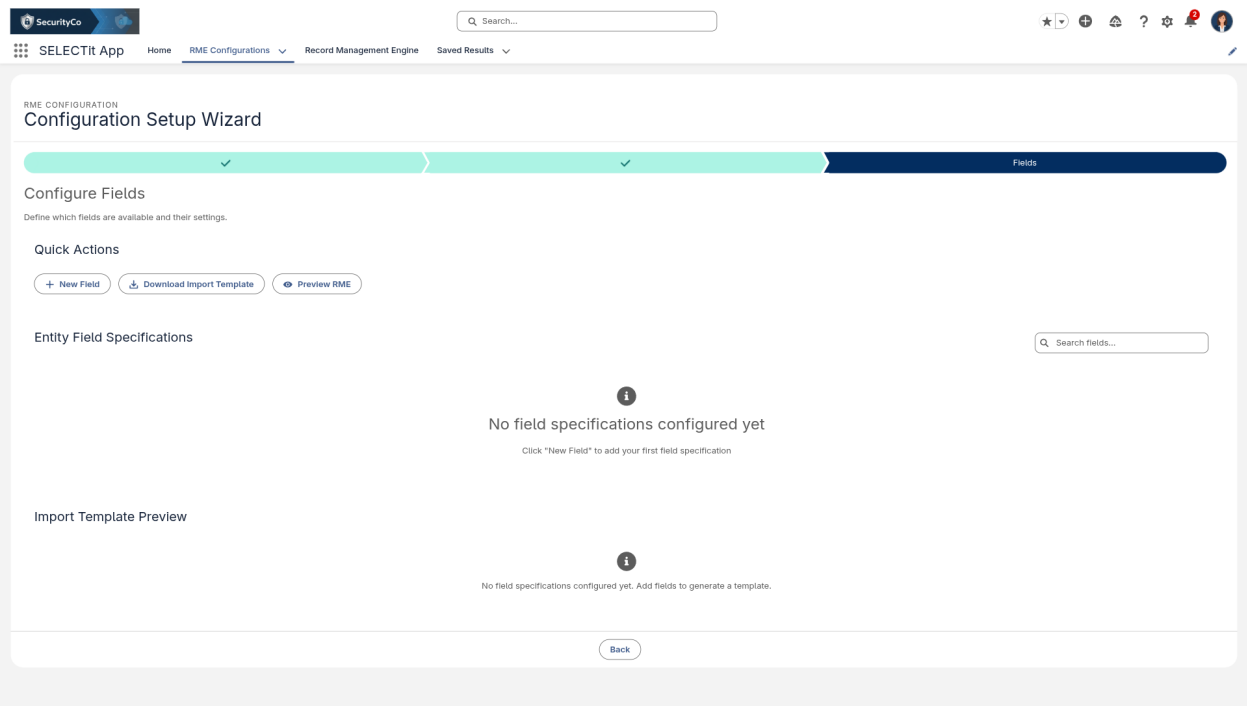

Figure 11.3: Field specification manager showing quick actions, field list with columns for label, API name, and import column

To add a field:

1. Click + **New Field**
2. Use the field selector to choose a field
3. Configure field options (Used In, Default Values, etc.)
4. Click **Save**

Browse Parent Fields:

1. In the field selector, click on a reference field
2. Navigate through relationship fields
3. Breadcrumbs show your current path
4. Select a field from any level in the hierarchy

Import Template Preview: For Global Import configurations, see a real-time preview of the generated CSV template as you add fields.

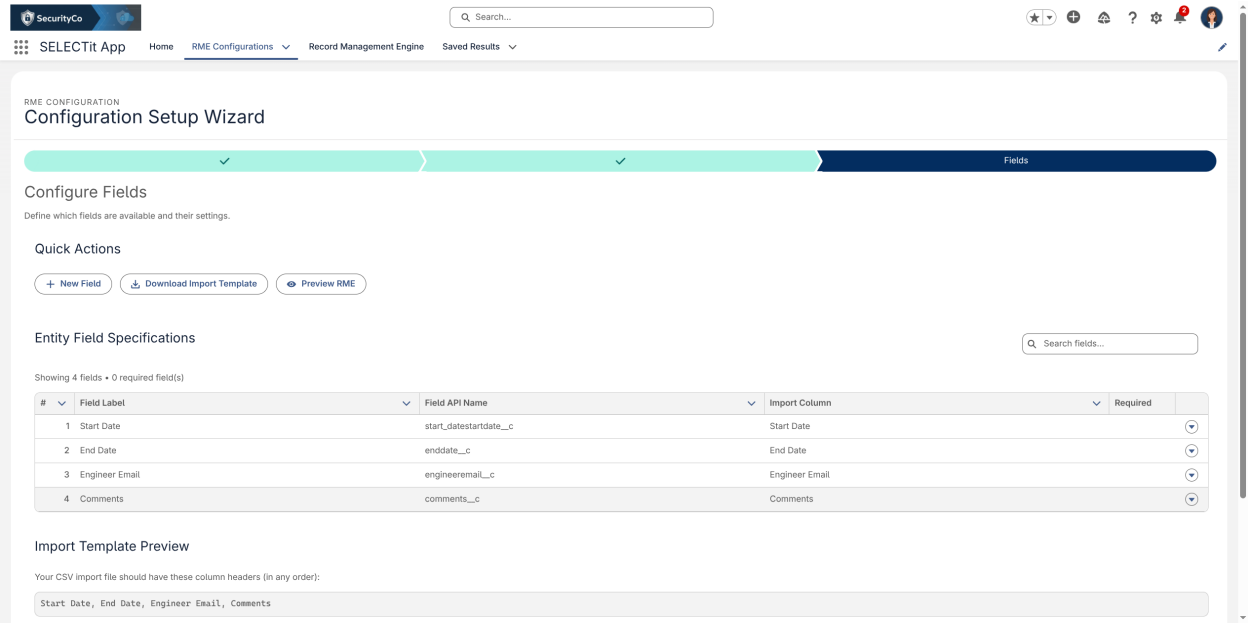

Figure 11.4: Import template preview showing expected CSV column headers at the bottom of the field specification manager

11.3 Saving and Publishing

1. Review all configuration details
2. Click **Save** to save as draft
3. Set **Publish Status** to “Published” when ready for users
4. Click **Preview RME** to test the configuration

Chapter 12

Saved Selections - Save and Reload Record Selections

SELECTit allows users to save their record selections for future use.

12.1 Saving a Selection

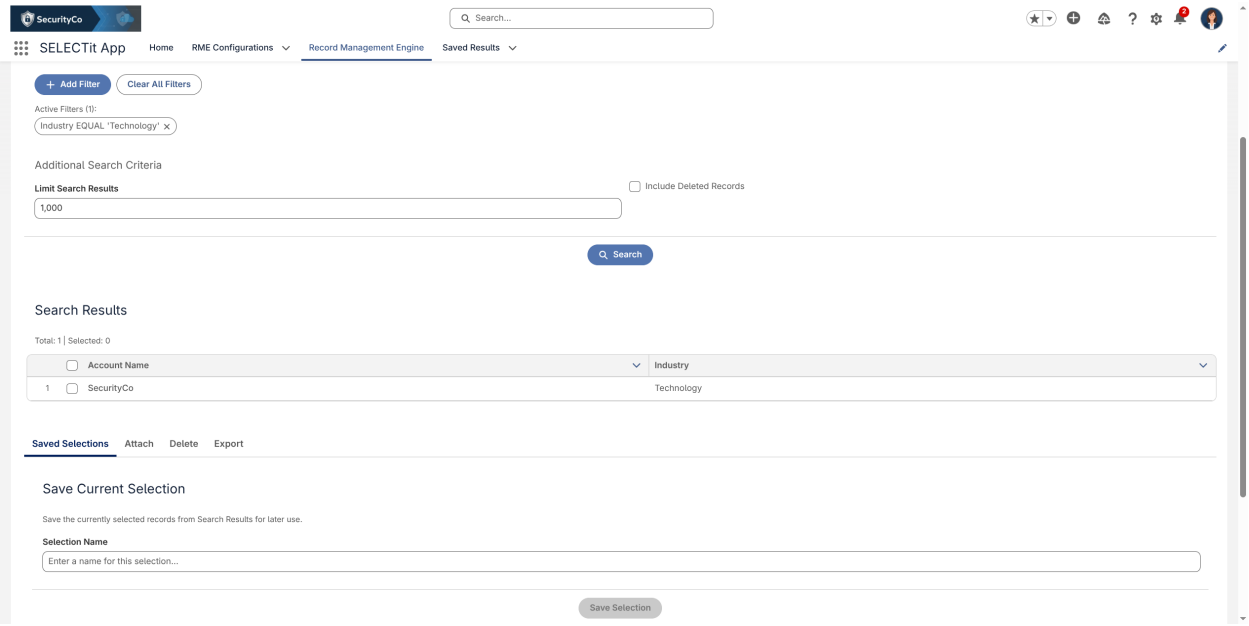

Figure 12.1: Saved Selections interface showing “Save Current Selection” section with name input and “Load Saved Selection” section with dropdown

To save a selection:

1. Build your record selection through search
2. Navigate to the **Saved Selections** tab
3. Enter a name for your selection in the “Selection Name” field
4. Click **Save Selection**

12.2 Loading a Saved Selection

To load a previously saved selection:

1. Open the Record Management Engine
2. Select your configuration
3. Navigate to the **Saved Selections** tab
4. Select from the **Saved Selection** dropdown
5. Click **Load** to add records to your current selection

12.3 Managing Saved Selections

Saved selections are stored as Saved Result records and can be:

- Viewed in the Saved Results tab
- Renamed or deleted as needed
- Shared based on Salesforce sharing rules
- Deleted using the **Delete** button next to Load

Chapter 13

Lightning Components Reference

SELECTit provides several Lightning Web Components that can be embedded in Lightning pages, Experience Cloud sites, and Flows using Lightning App Builder.

13.1 Global Import Widget

Component Name: `selectit__globalImport`

A self-contained import interface that can be embedded anywhere to enable CSV file imports.

13.1.1 Placement Options

- Lightning App Pages
- Lightning Record Pages
- Lightning Home Pages
- Experience Cloud Pages
- Flow Screens

13.1.2 Configuration Properties

Property	Type	Default	Description
RME Enterprise Id	String		Stable identifier for the RME Configuration (recommended for cross-org portability)
RME Configuration Id	String		Salesforce Id of the RME Configuration (use Enterprise Id for cross-org deployments)
Record Id	String		Record Id to associate with imported records
Store Record Id To Field	String		Field API name to populate with the Record Id value
Import Action	Picklist	SavedResultRedirect	Action after import: `SavedResultRedirect` (navigate to progress page) or `None` (stay on page)

13.1.3 Configuration Details Customisation

These properties allow you to customise the appearance of the configuration details section:

Property	Type	Default	Description
Configuration Details Label	String	Configuration Details	Custom heading for the configuration details section
Hide Configuration Details	Boolean	false	Hide the entire configuration details section
Hide Object	Boolean	false	Hide the Object field
Object Label	String	Object	Custom label for the Object field
Hide Fields Mapped	Boolean	false	Hide the Fields Mapped count
Fields Mapped Label	String	Fields Mapped	Custom label for the Fields Mapped field
Hide Required Fields	Boolean	false	Hide the Required Fields list
Required Fields Label	String	Required Fields	Custom label for the Required Fields field
Hide Expected Columns	Boolean	false	Hide the Expected Columns section
Expected Columns Label	String	Expected Columns	Custom label for the Expected Columns section

13.1.4 Usage Example

To embed the Global Import Widget on an Account record page:

1. Edit the Account Lightning Record Page in App Builder
2. Drag the **Global Import Widget** component onto the page
3. Set the **RME Enterprise Id** to your Import configuration's Enterprise Id
4. Optionally set **Record Id** to `{!recordId}` and **Store Record Id To Field** to `Account__c` to link imported records to the Account

13.2 Import Progress

Component Name: `selectit__importProgress`

Displays real-time import progress with live statistics for created, updated, and failed records.

13.2.1 Placement Options

- Lightning Record Pages (Saved Result object)
- Experience Cloud Pages

13.2.2 Configuration Properties

Property	Type	Default	Description
Saved Result Record Id	String		The Id of the Saved Result record (auto-populated on record pages)
Show Related Files	Boolean	false	Display a list of files attached to this Saved Result record

Property	Type	Default	Description
Broadcast Events	Boolean	false	Publish import progress events to the Lightning Message Channel for cross-component communication

13.2.3 Progress Information Displayed

- **Processing Status** - Queued, In Progress, Completed, or Failed
- **Progress Bar** - Visual percentage complete
- **Total Records** - Number of records being processed
- **Created Records** - Count and percentage of new records created
- **Updated Records** - Count and percentage of existing records updated
- **Failed Records** - Count and percentage of records that failed
- **Error Details** - Latest 5 error messages with full details available on the record

13.2.4 Related Files Section

When **Show Related Files** is enabled, a datatable displays all files attached to the Saved Result:

- File Name (clickable download link)
- Created Date
- Created By
- File Size

This is useful for viewing the original import CSV and any error files generated during processing.

13.3 Export Progress

Component Name: `selectit__exportProgress`

Displays real-time export progress with total and exported record counts.

13.3.1 Placement Options

- Lightning Record Pages (Saved Result object)
- Experience Cloud Pages

13.3.2 Configuration Properties

Property	Type	Default	Description
Saved Result Record Id	String		The Id of the Saved Result record (auto-populated on record pages)
Broadcast Events	Boolean	false	Publish export progress events to the Lightning Message Channel for cross-component communication

13.3.3 Progress Information Displayed

- **Processing Status** - Queued, In Progress, Finished, or Failed
- **Progress Bar** - Visual percentage complete

- **Total Records** - Number of records to export
- **Exported Records** - Number of records exported so far
- **Remaining Records** - Count of records still to process

13.4 Lightning Message Service Integration

SELECTit provides Lightning Message Channels that enable cross-component communication for import and export events. This allows your custom components to react to progress in real-time.

13.4.1 Available Message Channels

Channel	Component	Purpose
`selectit__ImportProgressChannel__c`	Import Progress	Broadcasts import events
`selectit__ExportProgressChannel__c`	Export Progress	Broadcasts export events

Important: Both channels are exposed (`isExposed="true"`), meaning components outside the SELECTit namespace can subscribe to them.

13.4.2 Enabling Event Broadcasting

1. Add the **Import Progress** or **Export Progress** component to your page
2. Enable the **Broadcast Events** property
3. Your custom components can subscribe to receive events

13.4.3 Import Progress Event Types

Event Type	When Published
`IMPORT_STARTED`	Import begins processing
`IMPORT_PROGRESS`	Status changes during processing
`IMPORT_COMPLETED`	Import finishes successfully
`IMPORT_FAILED`	Import fails

13.4.4 Import Progress Message Fields

Field	Description
`eventType`	Event type (see above)
`savedResultId`	Id of the Saved Result record
`totalRecords`	Total records to process
`processedRecords`	Records processed so far
`createdRecords`	Records created
`updatedRecords`	Records updated
`failedRecords`	Records that failed
`progressPercentage`	Progress percentage (0-100)
`status`	Current processing status

13.4.5 Export Progress Event Types

Event Type	When Published
`EXPORT_STARTED`	Export begins processing
`EXPORT_PROGRESS`	Status changes during processing
`EXPORT_COMPLETED`	Export finishes successfully
`EXPORT_FAILED`	Export fails

13.4.6 Export Progress Message Fields

Field	Description
`eventType`	Event type (see above)
`savedResultId`	Id of the Saved Result record
`totalRecords`	Total records to export
`exportedRecords`	Records exported so far
`remainingRecords`	Records remaining to export
`progressPercentage`	Progress percentage (0-100)
`status`	Current processing status

13.4.7 Subscribing from Custom Components

To subscribe to import or export events in your own Lightning Web Component:

```
import { LightningElement, wire } from 'lwc';
import { subscribe, MessageContext } from 'lightning/messageService';
import IMPORT_PROGRESS_CHANNEL from
    '@salesforce/messageChannel/selectit__ImportProgressChannel__c';
import EXPORT_PROGRESS_CHANNEL from
    '@salesforce/messageChannel/selectit__ExportProgressChannel__c';

export default class MyCustomComponent extends LightningElement {
    importSubscription = null;
    exportSubscription = null;

    @wire(MessageContext)
    messageContext;

    connectedCallback() {
        this.subscribeToChannels();
    }

    subscribeToChannels() {
        if (!this.importSubscription) {
            this.importSubscription = subscribe(
                this.messageContext,
                IMPORT_PROGRESS_CHANNEL,
                (message) => this.handleImportEvent(message)
            );
        }
        if (!this.exportSubscription) {
            this.exportSubscription = subscribe(
                this.messageContext,
                EXPORT_PROGRESS_CHANNEL,
                (message) => this.handleExportEvent(message)
```

```
            );
        }
    }

    handleImportEvent(message) {
        if (message.eventType === 'IMPORT_COMPLETED') {
            // Refresh data, show notification, etc.
            console.log('Import completed!', message.createdRecords, 'created');
        }
    }

    handleExportEvent(message) {
        if (message.eventType === 'EXPORT_COMPLETED') {
            // Download file, refresh list, etc.
            console.log('Export completed!', message.exportedRecords, 'exported');
        }
    }
}
```

13.4.8 Use Cases

- **Dashboard Refresh** - Automatically refresh a dashboard when imports/exports complete
- **Notification System** - Show custom notifications based on results
- **Workflow Triggers** - Kick off additional processes when operations finish
- **Progress Synchronisation** - Keep multiple components in sync during long operations
- **Download Automation** - Trigger file download when export completes

Chapter 14

Limitations

SELECTit is a native Salesforce application bounded by Salesforce governor limits.

14.1 Global Search Limitations

Limitation	Description
View Size Limit	Use selective search criteria and limit the number of fields to avoid exceeding viewsize
Export Limit	Maximum 50,000 records per export
SOSL Search	Full-text search depends on org's search indexing configuration
Large Picklists	Picklists with 1000+ values may have slight delay in filter dropdowns

14.2 Global Import Limitations

Limitation	Description
CPU Time Limit	Maximum ~800,000 characters per file
File Size Limit	Maximum 25 MB (Salesforce ContentDocument limit)
File Type	CSV (Comma Separated Values) in UTF-8 format only
Batch Queue	Maximum 5 concurrent batch jobs, 100 jobs in holding status

14.3 Processing Thresholds

By default, all operations use Apex Batch processing. The following thresholds only apply when **Use Adaptive Processing** is enabled on the RME Configuration:

Record Count	Processing Method	Notes
1-200	Synchronous	Immediate results
201-2,000	Queueable	Single async job
2,001+	Batch	Chunked processing

Important: If your import template relies on sequential record processing (e.g. creating parent records before child records), leave Use Adaptive Processing disabled and set an appropriate Batch Process Records No.

14.4 Mobile Support

The Record Management Engine is optimized for desktop use. Mobile access is supported but with simplified layout.

14.5 Date/DateTime Fields

For read-only date fields (e.g., CreatedDate), use one of these formats:

- UTC Date: `YYYY-MM-DD`
- UTC DateTime: `YYYY-MM-DD hh:mm:ss`
- Local Date: `DD/MM/YYYY`
- Local DateTime: `DD/MM/YYYY hh:mm:ss`

Permission Sets

SELECTit includes the following permission sets:

Permission Set	Description
SELECTit_Admin_Access	Full access to create and manage RME Configurations
SELECTit_User_Access	Access to use published RME Configurations
SELECTit_External_User_Access	Access for Community/Experience Cloud users
SELECTit_External_User_Admin_Access	Admin access for Community/Experience Cloud users

14.6 Assigning Permission Sets

1. Navigate to Setup > Users > Permission Sets
2. Select the appropriate SELECTit permission set
3. Click **Manage Assignments**
4. Click **Add Assignments**
5. Select users and click **Assign**

Support

For questions, issues, or feature requests:

- Contact your Salesforce administrator
- Visit www.everyonesplatform.com

Thank you for using SELECTit!

SELECTit provides a powerful yet easy-to-use solution for managing Salesforce records at scale, while maintaining the reliability and flexibility your organization needs.