



Junction Builder

USER MANUAL



CMMISVC/3SM
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gold
cloud alliance
partner

Junction Builder

Overview

Junction Builder allows you to create multiple junction records with minimal efforts. You can drag and drop the component on any record detail page and configure accordingly to create mass junction records. You need to setup your metadata configuration according to your requirement. You can then create multiple junction records easily. You can edit or delete your newly created junction records in just one click. The component works well for both standard as well as custom objects.

Custom Metadata Setup

Junction Builder requires minimal configuration setup. You need to create metadata setup based on your requirement.

S.no	Fields	Description	Example
1.	Parent1 API Name	API name of parent in which component is residing.	<i>Account /namespace__Job__c</i>
2.	Parent2 API Name	API name of the other parent.	<i>User/namespace__Candidate__c</i>
3.	Junction Object API Name	API of the Junction Object.	<i>AccountTeamMember, namespace__Application__c</i>
4.	Search Condition	Search condition based on which parent records are displayed. This condition will be directly added to the query so add 'AND, OR' while adding multiple conditions.	<i>Name!=null, Name!=null AND Phone!=null</i>
5.	Parent Search Field API Name	API Name of the field based on which the Parent records will be filtered from the search box.	<i>Name</i>
6.	Parent Field Name	Comma separated parent field API names on junction Object. The first name must be the API name of the parent on which the component is placed.	<i>AccountId, UserId</i>

7.	Parent Column Name	API Name of the field to display in the Parent's record table from which junction record is created.	<i>Name, Phone</i>
8.	Junction Column Name	API Name of the field to display in the Junction records table.	<i>Title, Name</i>
9.	Junction Table search field	API name of the field based on which the Junction records will be searched in search bar above Junction record table.	<i>Name</i>

Junction Record Creator

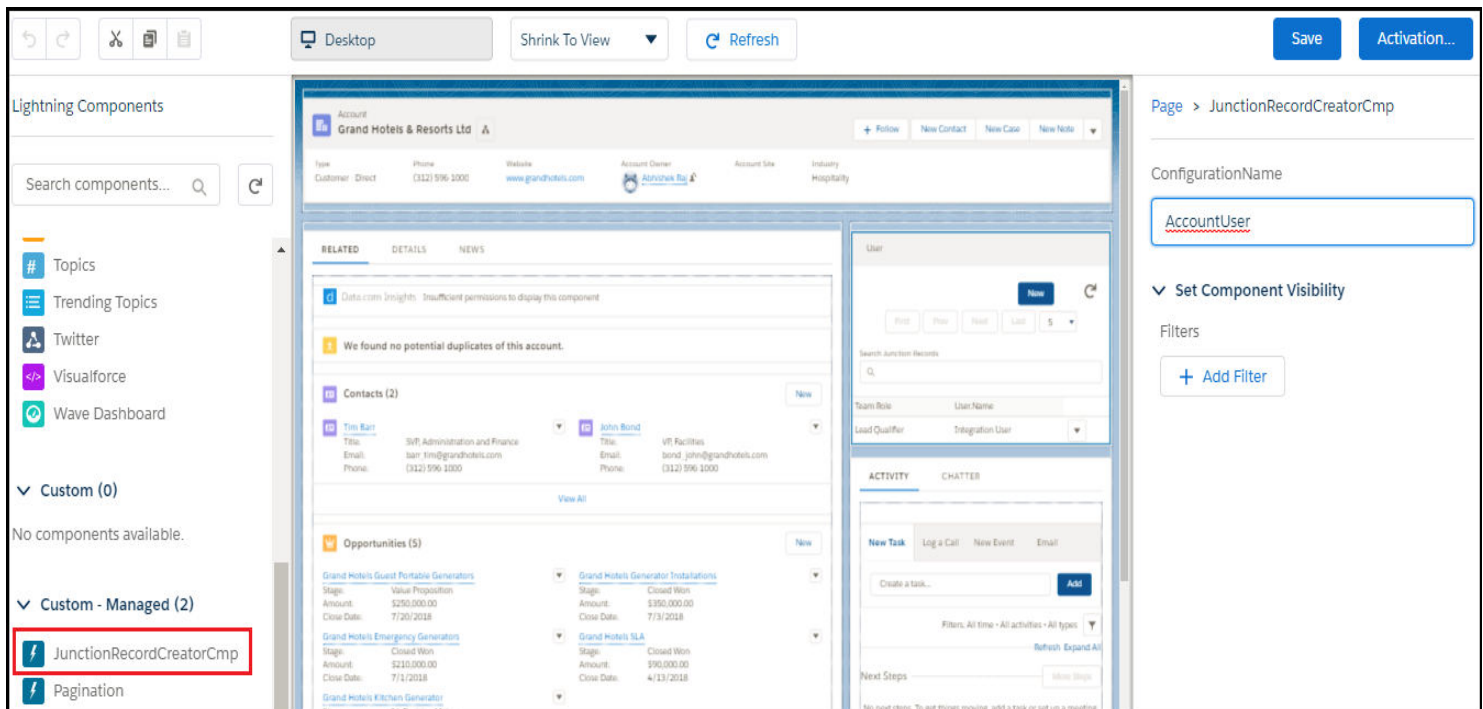
Junction Record Creator Detail

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Label	AccountUser	Protected Component	☐
Junction Record Creator Name	AccountUser	Namespace Prefix	
Parent1 API Name	Account		
Parent 2 API Name	User		
Junction Object API Name	AccountTeamMember		
Search Condition	Name!=null		
Parent Search Field API Name	Name		
Parent Field Names	AccountId,UserId		
Parent Column Name	Name		
Junction Column Name	TeamMemberRole,User.Name		
Junction Table search field	TeamMemberRole		
Created By	Abhishek Raj, 7/25/2018 4:48 AM		Last Modified By
			Abhishek Raj, 7/25/2018 4:48 AM

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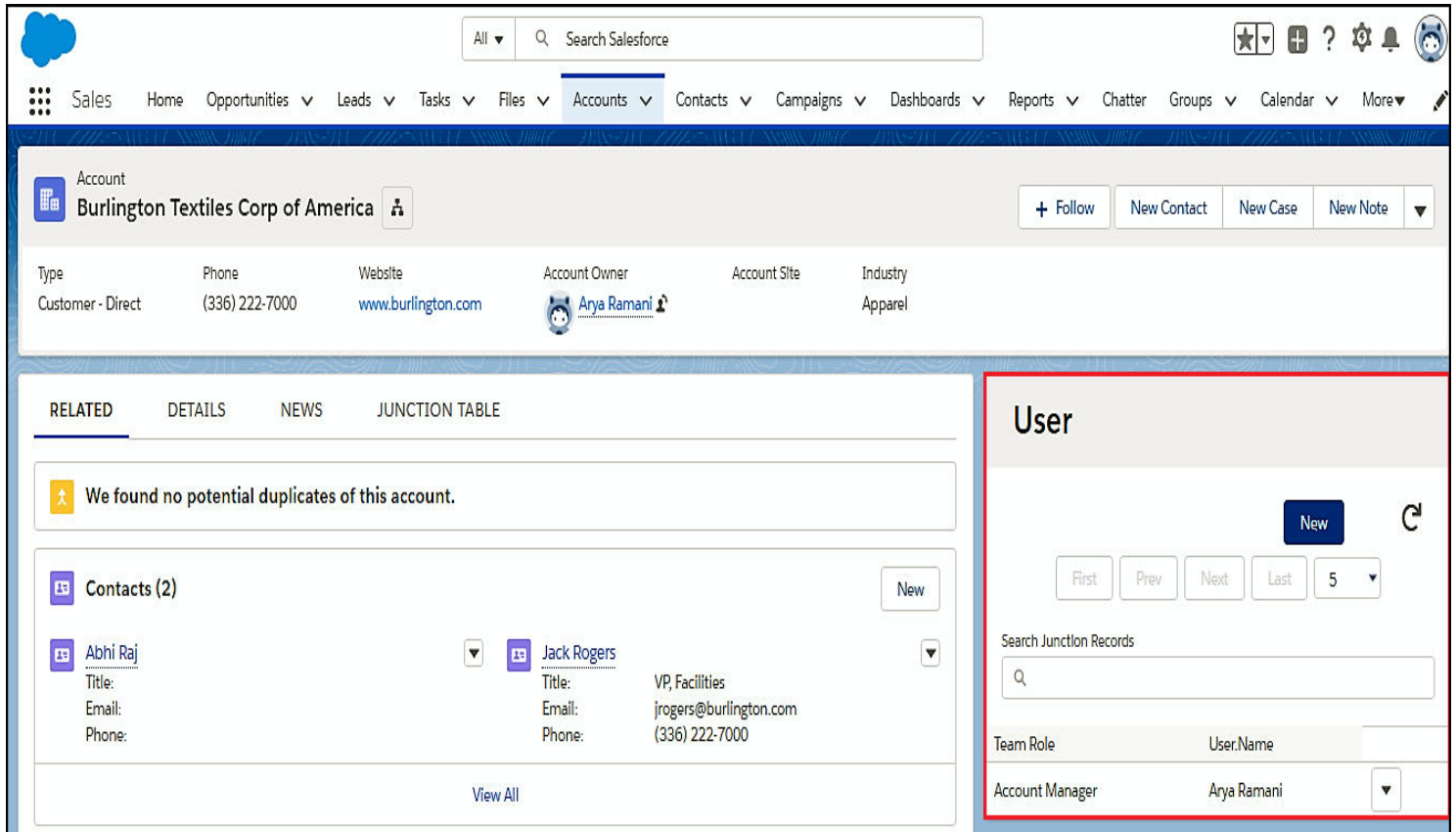
1. Drag and drop the component on parent record page. Provide the developer name of the metadata record on the top right box as shown in the figure below.



The screenshot shows the Salesforce Lightning Components interface. On the left, the 'Lightning Components' sidebar is visible, with a search bar and a list of components. The 'JunctionRecordCreatorCmp' component is highlighted in the 'Custom - Managed (2)' section. The main area displays a parent record page for 'Grand Hotels & Resorts Ltd'. The right sidebar shows the configuration for the 'JunctionRecordCreatorCmp' component, with the 'ConfigurationName' field set to 'AccountUser'.

2. After adding the component on the parent object detail page, save and activate it. Now you can get started with creating junction records.

3. Existing junction records will be visible in junction record table in the component.



The screenshot shows the Salesforce interface for the account "Burlington Textiles Corp of America". The account owner is Arya Ramani. The page includes tabs for RELATED, DETAILS, NEWS, and JUNCTION TABLE. The JUNCTION TABLE tab is active, showing a message: "We found no potential duplicates of this account." Below this, there are two contact cards: Abhi Raj and Jack Rogers. Jack Rogers is highlighted, showing his details: Title: VP, Facilities; Email: jrogers@burlington.com; Phone: (336) 222-7000. A "View All" link is present. On the right, there is a "User" section with a "New" button, pagination controls, and a search bar for "Search Junction Records". Below the search bar, there is a table with columns "Team Role" and "User.Name". The table shows one record: "Account Manager" for "Arya Ramani".

Account: Burlington Textiles Corp of America

Type: Customer - Direct | Phone: (336) 222-7000 | Website: www.burlington.com | Account Owner: Arya Ramani | Account Site: | Industry: Apparel

RELATED | DETAILS | NEWS | JUNCTION TABLE

We found no potential duplicates of this account.

Contacts (2)

Contact	Title	Email	Phone
Abhi Raj			
Jack Rogers	VP, Facilities	jrogers@burlington.com	(336) 222-7000

View All

User

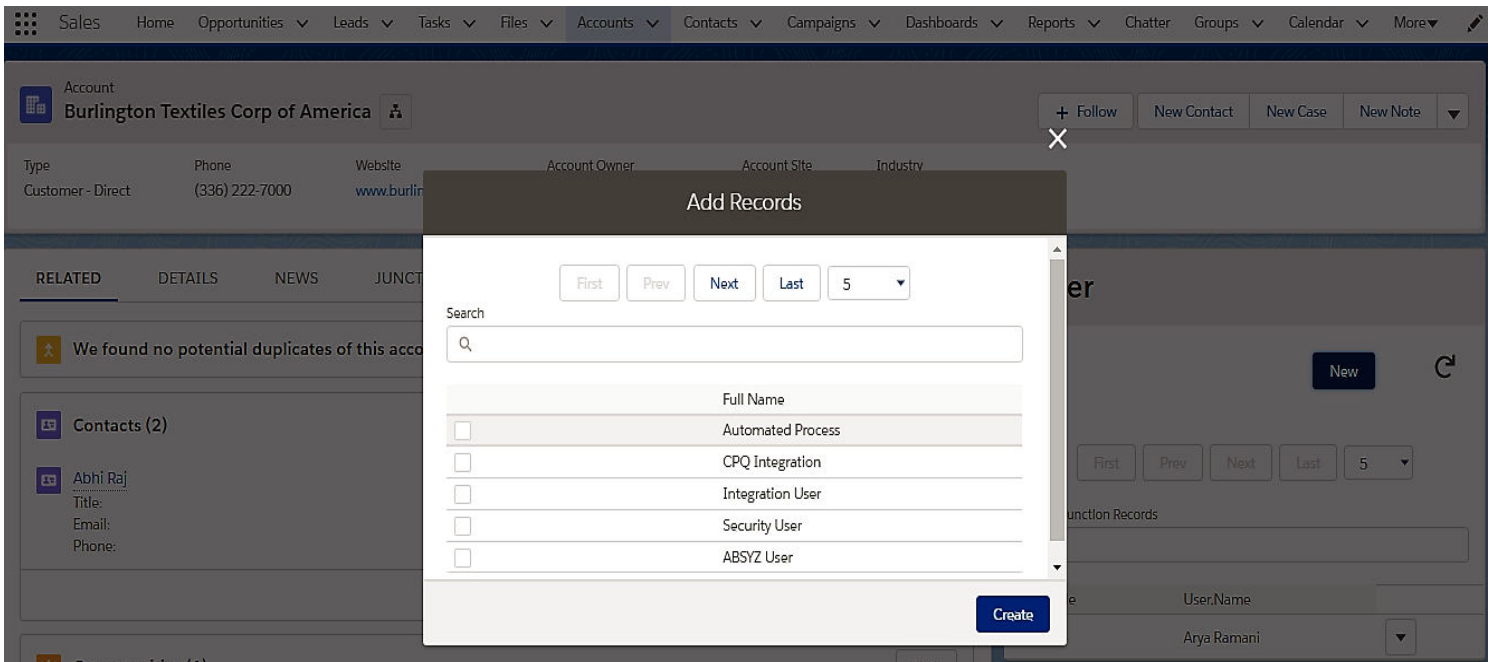
New

First | Prev | Next | Last | 5

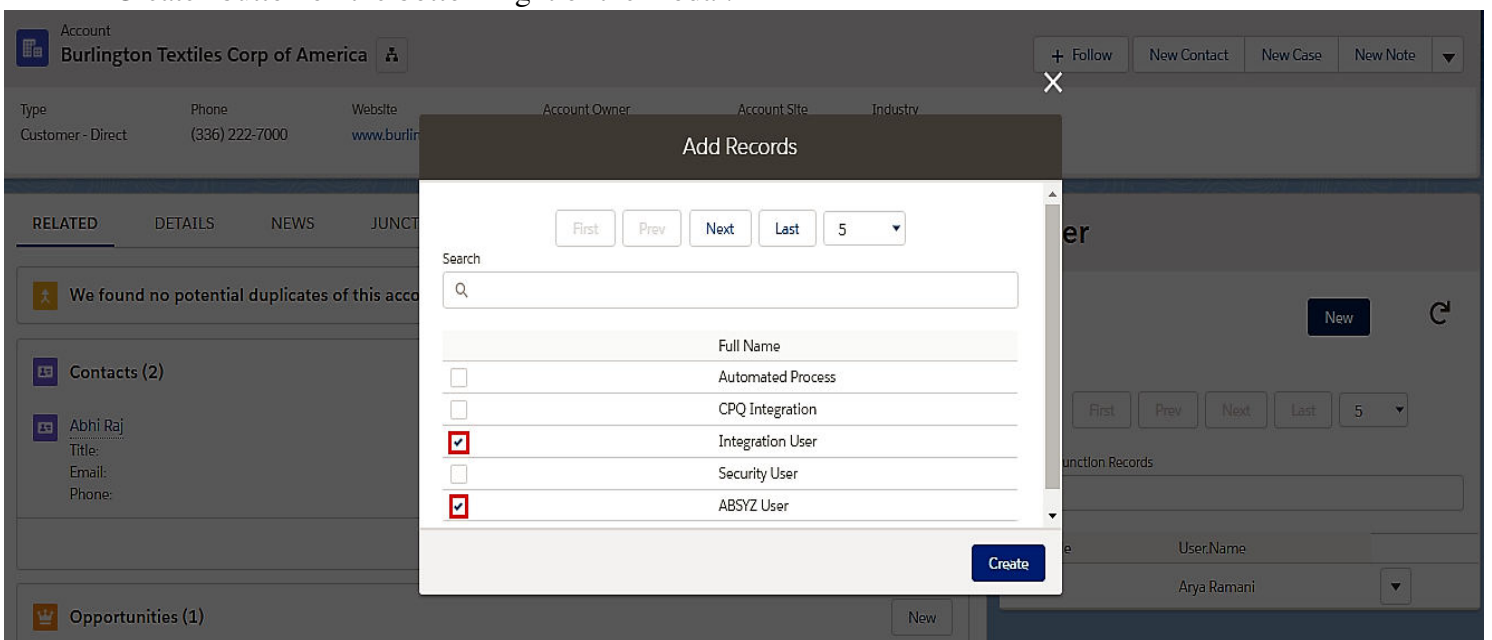
Search Junction Records

Team Role	User.Name
Account Manager	Arya Ramani

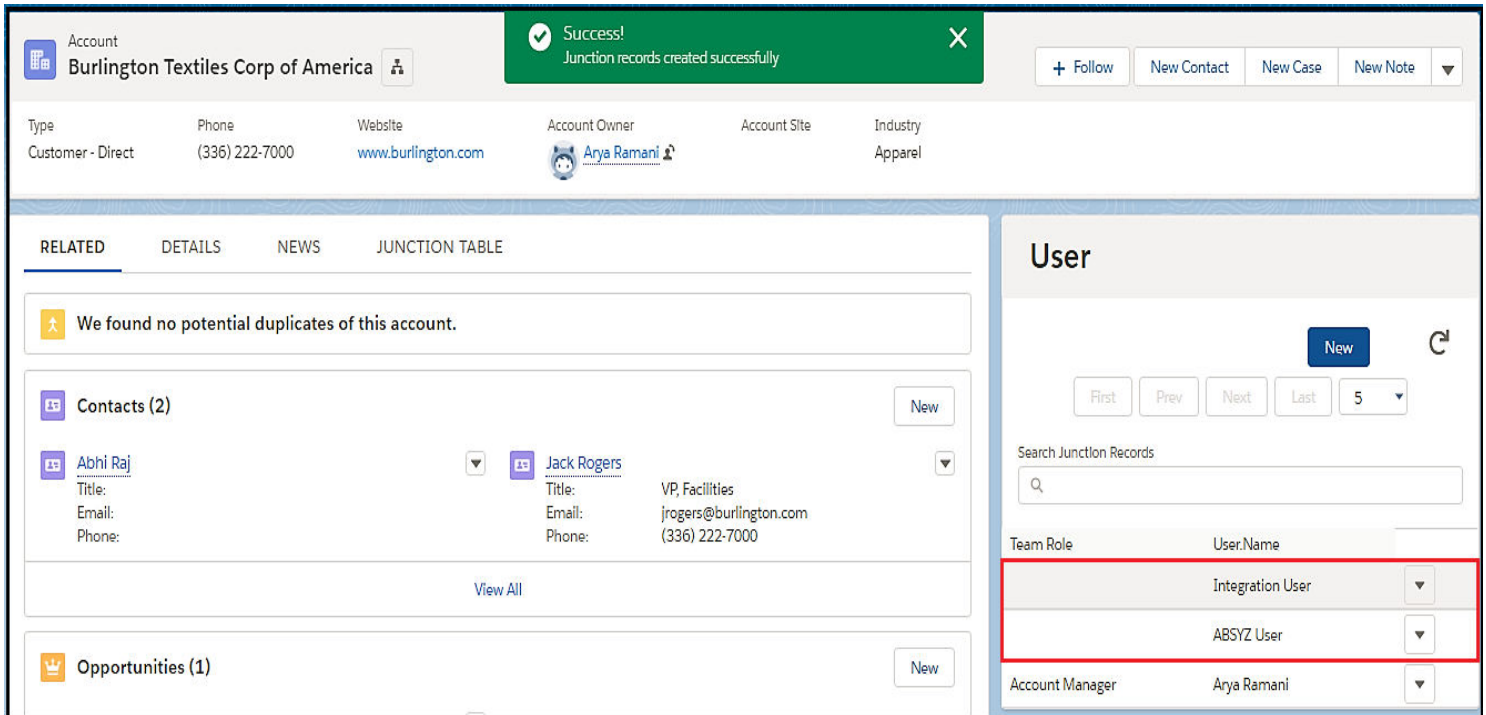
- To create junction records, click on the “New” button in the component and a modal pops up. The modal consists of records of second parent object. Records in the table are filtered based on the conditions that are specified in the custom metadata setup.



- Select the record(s) for which junction record needs to be created. After selecting the record(s), click on “Create” button on the bottom right of the modal.



- After the junction record is created, a toast message will be visible on top of the page and the record gets added to the table in the component as shown below.



Account: Burlington Textiles Corp of America

Success! Junction records created successfully

Follow New Contact New Case New Note

Type: Customer - Direct Phone: (336) 222-7000 Website: www.burlington.com Account Owner: Anya Ramani Account Site: Industry: Apparel

RELATED DETAILS NEWS JUNCTION TABLE

We found no potential duplicates of this account.

Contacts (2) New

Contact	Title	Email	Phone
Abhi Raj			
Jack Rogers	VP, Facilities	jrogers@burlington.com	(336) 222-7000

View All

Opportunities (1) New

User

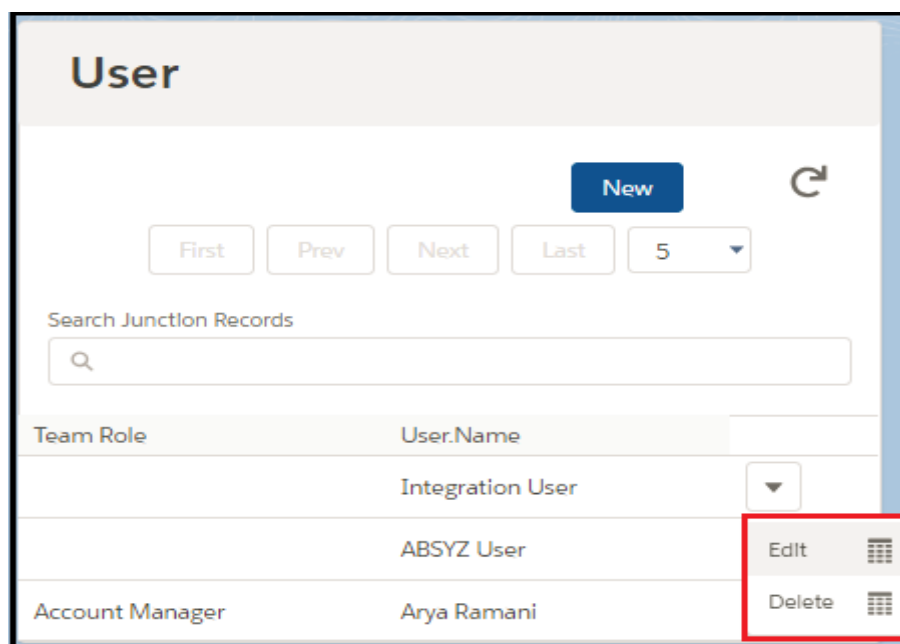
New

First Prev Next Last 5

Search Junction Records

Team Role	User.Name
Integration User	
ABSYZ User	
Account Manager	Arya Ramani

- In the junction record table, there is option to Edit/Delete junction record.



User

New

First Prev Next Last 5

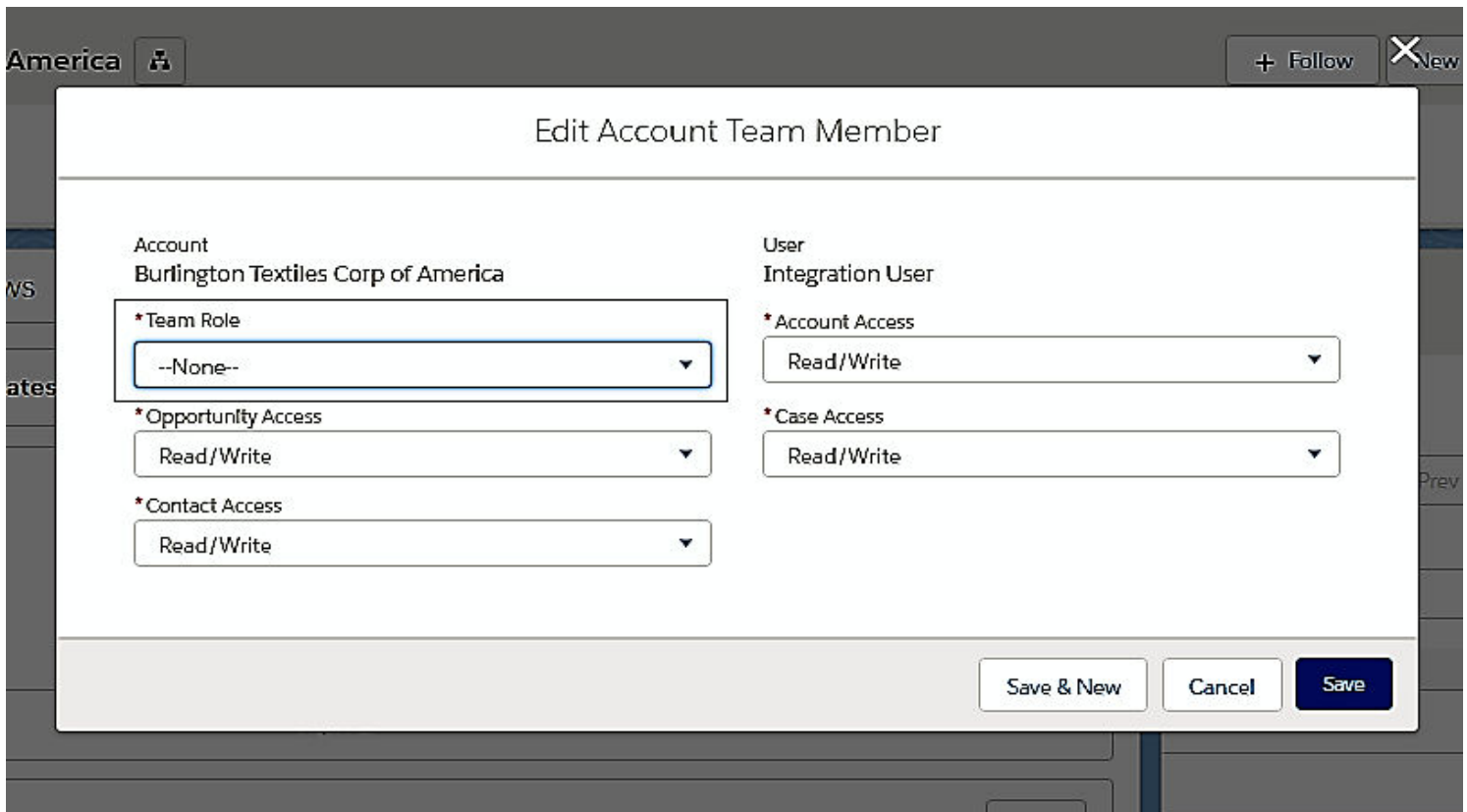
Search Junction Records

Team Role	User.Name
Integration User	
ABSYZ User	
Account Manager	Arya Ramani

Edit

Delete

8. On click of Edit option, standard edit page opens up to edit and save the record.

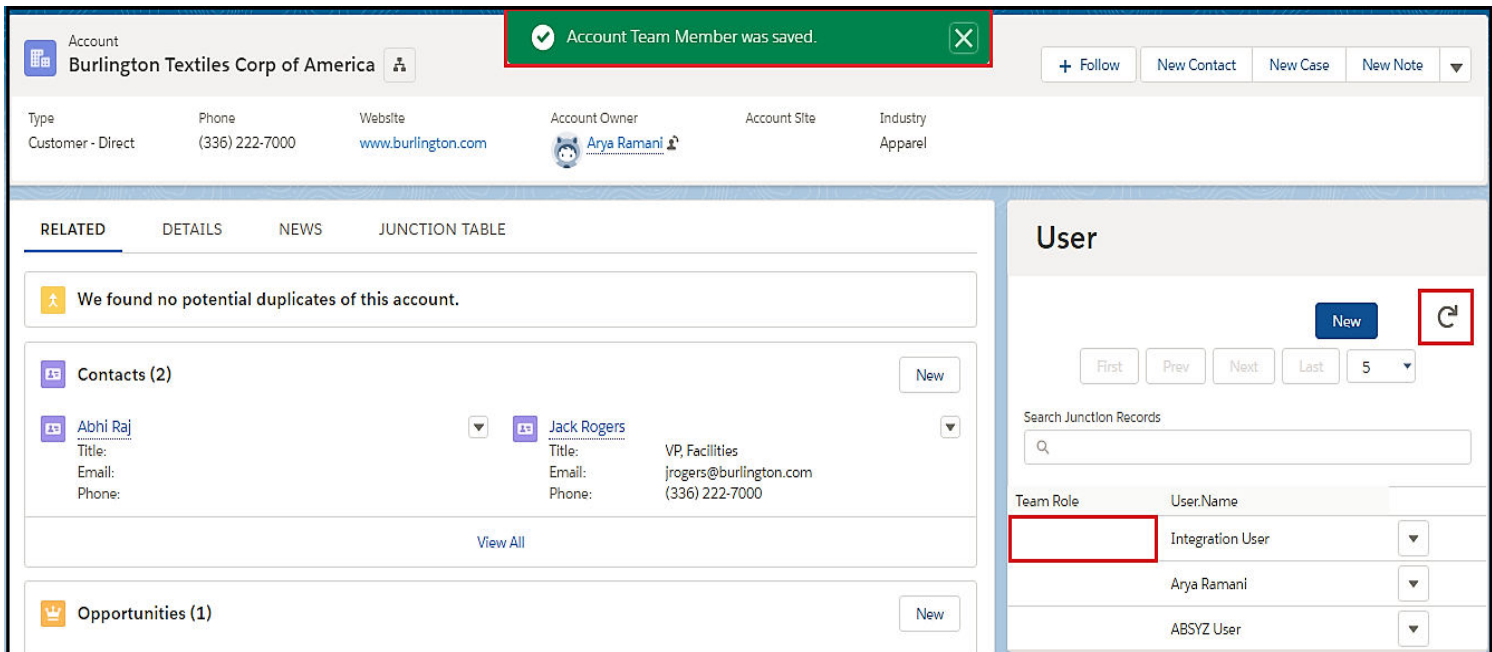


The screenshot shows a web application interface for editing a team member. At the top left, there's a header with 'America' and a user icon. At the top right, there are buttons for '+ Follow' and 'X New'. The main content area is titled 'Edit Account Team Member'. It is divided into two columns: 'Account' and 'User'. The 'Account' column shows 'Burlington Textiles Corp of America' and three dropdown menus for '*Team Role' (set to '--None--'), '*Opportunity Access' (set to 'Read/Write'), and '*Contact Access' (set to 'Read/Write'). The 'User' column shows 'Integration User' and two dropdown menus for '*Account Access' (set to 'Read/Write') and '*Case Access' (set to 'Read/Write'). At the bottom right, there are three buttons: 'Save & New', 'Cancel', and 'Save'.

Account	User
Burlington Textiles Corp of America	Integration User
*Team Role --None--	*Account Access Read/Write
*Opportunity Access Read/Write	*Case Access Read/Write
*Contact Access Read/Write	

Save & New Cancel Save

9. After saving the record, a toast message is visible on the top of the page. Click on refresh icon on the upper right corner to see the changes in the junction record table.



Account: Burlington Textiles Corp of America

Type: Customer - Direct | Phone: (336) 222-7000 | Website: www.burlington.com | Account Owner: Arya Ramani | Account Site: | Industry: Apparel

RELATED | DETAILS | NEWS | JUNCTION TABLE

We found no potential duplicates of this account.

Contacts (2)

Name	Title	Email	Phone
Abhi Raj			
Jack Rogers	VP, Facilities	jrogers@burlington.com	(336) 222-7000

View All

Opportunities (1)

User

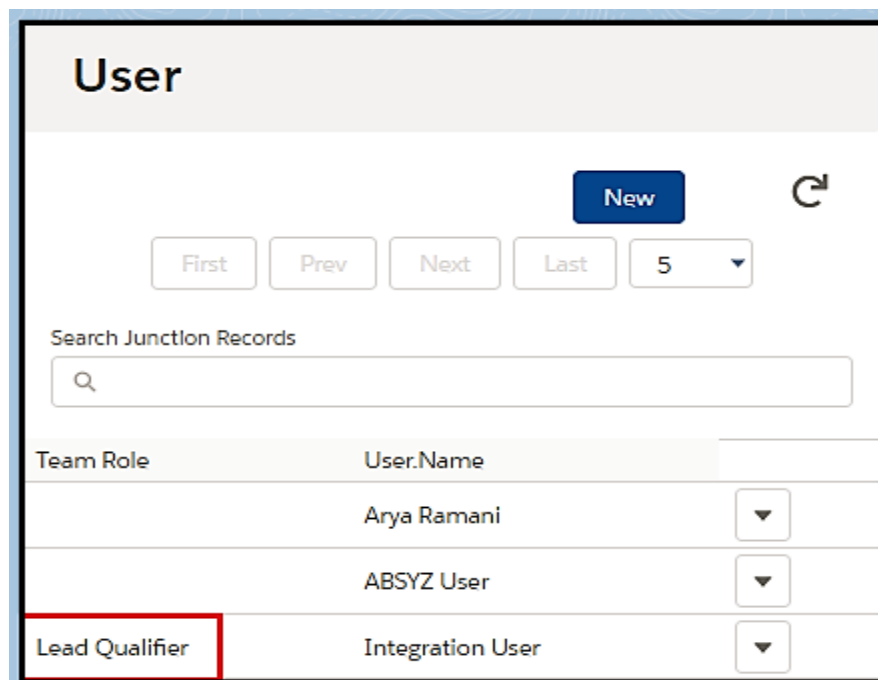
New

First Prev Next Last 5

Search Junction Records

Team Role	User.Name
	Integration User
	Arya Ramani
	ABSYZ User

10. On click of refresh icon, the edited changes are reflected in the junction table.



User

New

First Prev Next Last 5

Search Junction Records

Team Role	User.Name
Lead Qualifier	Integration User
	Arya Ramani
	ABSYZ User

11. Junction builder also provides an option to delete the existing junction records.

User

[New](#) 

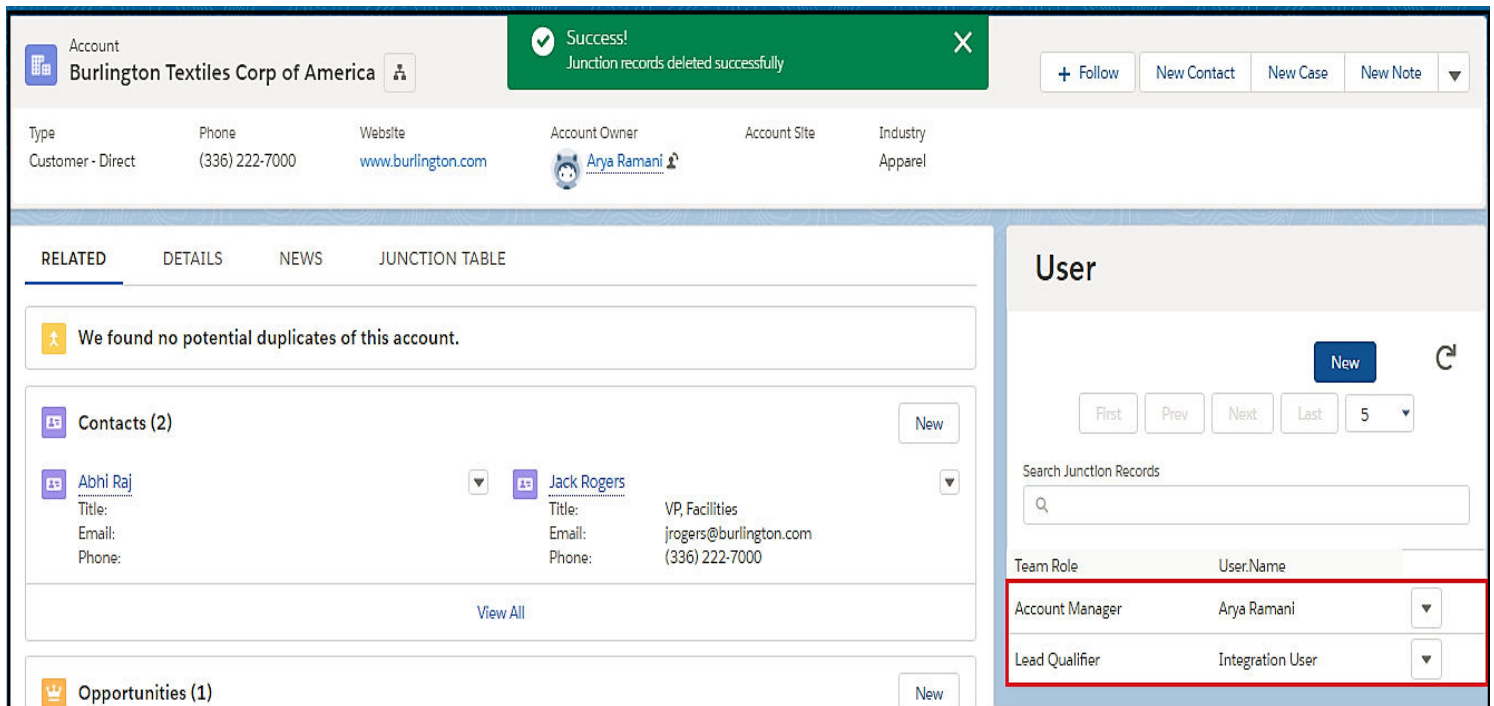
[First](#) [Prev](#) [Next](#) [Last](#) [5](#) ▼

Search Junction Records

Team Role User.Name

	ABSXYZ User	▼
Account Manager	Arya Ramani	Edit 
Lead Qualifier	Integration User	Delete 

12. On click of “Delete”, the record gets deleted and a toast notification message is visible on top of the page.



Account: Burlington Textiles Corp of America

Success! Junction records deleted successfully

+ Follow New Contact New Case New Note

Type: Customer - Direct Phone: (336) 222-7000 Website: www.burlington.com Account Owner: Arya Ramani Account Site: Apparel Industry: Apparel

RELATED DETAILS NEWS JUNCTION TABLE

We found no potential duplicates of this account.

Contacts (2) New

Abhi Raj Title: Email: Phone: Jack Rogers Title: VP, Facilities Email: jrogers@burlington.com Phone: (336) 222-7000 View All

Opportunities (1) New

User

New

First Prev Next Last 5

Search Junction Records

Team Role User.Name

Account Manager	Arya Ramani
Lead Qualifier	Integration User