

PostObject Pro - Automating processes for improved efficiency and reduced cost

Installation and User Guide

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1. Product Overview

Copying data from your Source Object to Target Object & automatically defining default values for your Target Object was never so Easy & Convenient!!!

As a Salesforce administrator your entire focus is to get the processes automated with the best data quality and ease of use.

At Damco Solutions, we constantly innovate to help businesses gain more efficiency with the best automations. Therefore, we have designed & developed a Salesforce Package– PostObject Pro which does exactly what every Salesforce Administrator would love to have in his Salesforce kitty.

Empower your users to do their job easily, efficiently and quickly without writing a single line of code. With no extra configurations and automations to care about save your crucial time, resources and efforts to devote into your core business challenges.

2. Product Benefits

Convenient

Define the field mappings between two objects and use the mapping to auto-populate the values from source object to target object while creating the target object record.

Easy

Forget triggers and other complicated mechanisms to auto-fill values; just 2 step easy configuration to enable automated mapping and record creation.

Extensible

Define mappings for the new objects and addition of new fields to the existing objects on the go.

Timesaver

Auto-matching of fields based on Field Type, Name and API Name to save mapping time.

Intuitive

Intelligent mapping for pick list values to select value from the available options on the target object.

User Friendly

Needs Administrator's involvement for the initial configurations only. Users can then proceed by selecting the right mapping between two objects while creating the target object records from the source object.

Secure

Runs in system mode to bypass user permissions for record creation. However the same permissions will be applied when viewing the created record thus ensuring system level security.

3. Product **Installation**

Salesforce Administrators and Users with the “Download AppExchange packages” permission can download and install ‘PostObject Pro’ package from AppExchange, a complete marketplace for cloud computing applications and consulting partners.

1. Click the AppExchange link in your organization or go to <https://appexchange.salesforce.com/> .
2. Browse the AppExchange site to find the ‘PostObject Pro’ application to install.
3. Click ‘Get It Now’ from the application information page.
4. Select your environment type: production or sandbox (test).
5. Enter the requested information. For production environments, enter your username and password, read the user terms, accept the license agreement and click Install. For sandbox environments, complete the information in the form provided and click Submit. This package is removed from your sandbox organization whenever you create a new sandbox copy.
6. Review the package items and click Continue.
7. Review the API access that package components have been granted to ensure they are acceptable, and click next if they are. If they are not, click Cancel. For more information, see “About API and Dynamic Apex Access in Packages” in the Salesforce online help.
8. Grant access to all users specifies the following settings on all internal custom profiles:
 - Object permissions—“Read,” “Create,” “Edit,” “Delete,” “View All,” and “Modify All” are all enabled.
 - Field-level security—Set to visible and editable for all fields.
 - Apex classes—Enabled.
 - Visualforce pages—Enabled.
 - App settings—Enabled.
 - Tab settings—Determined by the package creator.
 - Page layout settings—Determined by the package creator.
 - Record Type settings—Determined by the package creator.
9. Click Install to install all the components in the package you have selected.

4. Product **Configuration**

Once you have installed the Package from the App Exchange and configured security permissions for the desired users/profiles there is a three-step process to create and use the defined mappings for a standard/custom object. These steps can be performed by a system administrator and the desired field level security for the objects involved in the mapping as well as application itself must be configured.

4.1 Add Objects Applicable with PostObject Pro

Go to PostObject Pro Settings Tab and select Objects to be enabled for PostObject Pro. You can add standard as well as custom objects for the mapping and change them anytime. You will not be able to define Object Mapping without this configuration in place.

4.2 Define Object Mappings

Go to PostObject Pro App and select “Object Mappings” tab. Create your mappings by providing the following details:

Object Mapping Name

Provide a meaningful name to the mapping. This is what the Name of the Button will be on the Source Object.

Description

Give a brief description about this mapping. This description will help the users to identify the correct mapping to use, in case multiple mappings exists between same source and target objects.

Select Source Object

Source Object of the mapping can be selected from the list of available options as configured earlier.

Select Target Object

Target Object of the mapping can be selected from the list of available options as configured earlier. On selection of Target Object a new mapping section will appear below where the mappings can be defined.

Create Button on Source Object

To enable auto creation of the button on Source Object, user will have to select the checkbox ‘**Create Button on Source Object**’.

The mappings are of two types:

Field Mapping

The target object fields will be populated automatically when the target object is selected. The Source Object Fields will be auto populated with the list of fields which have the same field type as that of the selected target object field.

If the Name or the API Name of the source object field matches with the target object field that value is automatically mapped. Otherwise, user has the option to select the most suitable field from the available options for the target object field manually. “Is Value Map” should remain unselected in this case.

Value Mapping

The user can skip the field values and choose to specify a particular value for the target object (hardcoded one) when it is created by selecting this mapping. User must select “Is Value Map” for saving the mapping as a value mapping and then define a value in the “Enter Value” column or select a value from “Available Values” column in case of a pick list field.

Please use the “Format” column to refer the right format of the Value Mapping. A wrong format may result in an error at run time. Please use the table below as the general guideline for defining value mapping.

Field Type	Acceptable Values
Boolean	True or False

Currency	15.78
DateTime	2015-05-24T13:56:56Z
Date	2015-01-25
Double	15.78
Email	Valid Email address
Picklist	Options appearing in "Available Values" Column
Reference	15 digit salesforce record Id
String	Text value
Text Area	Text value
Percentage	15.78

Once you have defined the Field Mappings and Value Mappings for the object click on the "Save Mappings" button to save it.

4.3 Add Custom Button to the Source Object

In order to enable the users to utilize the mappings defined above - Add a Custom Button on the Source object and Add it to the Page Layout of the same.

Click on the "Create Button On Source Object" button from the Object mapping detail page and this will automatically create the Button on the Source Object which you have defined on Object Mapping.

Now, On the Source Object, User can add this button on the required Page layout, to create Target Object record with the same mapping.

4.4 Delete Object Mapping And Custom Button from source object

In order to Delete the Object Mapping and Source Object button on the record detail page, click on 'Delete Object Mapping And Button' button and it will delete both the Object Mapping, that the user created and the button which is on Source Object linked to that mapping.

5 About Damco

Damco is a perfect technology partner enabling enterprises to make profound IT impact on their businesses in the constantly changing marketplace. For around two decades, we have been a steadfast company focused on the progress of our clients and developing trustworthy relationships with our customers, partners and employees.

Damco Salesforce CoE has helped businesses improve workforce productivity, as they work to achieve customer satisfaction and implement technology best practices. Our team of Salesforce Experts and tech pros help businesses to leverage Salesforce to improve workforce productivity, customer satisfaction and develop powerful and scalable products faster.



6 Contact Us

USA

Damco Solutions Inc.

2 Research Way,
Princeton, NJ 08540
Phone: +1 609 632 0350

Luxembourg

Damco Solutions Sarl

42-44, 1st Floor, Rue de Hollerich,
L-1740, Luxembourg
Phone: +352 2088 0491

UK

Damco Solutions Ltd

84 Uxbridge Road,
Ealing, London W13 8RA
Phone: +44 208 799 2800

Australia

Damco Solutions

Level 3, Collins Street Tower, 480 Collins Street,
Melbourne Victoria 3000, Australia
Phone: +61 3 9111 0246

India

Damco Solutions Pvt. Ltd.

Faridabad

108 HSIDC Indl. Estate,
Sector 31, Faridabad 121008
Phone: +91 129 419 1000

Noida

C-111, Sector 63,
Noida 201301
Phone: +91 120 425 0700

Chandigarh

B-Towers, 3rd Floor, DLF Infocity,
Rajiv Gandhi Chandigarh Technology Park,
Chandigarh 160101
Phone: +91 172 400 1122

Hyderabad

Unit: 01 - 04, 1st Floor, Block 2,
Cyber Pearl, Hitech City, Madhapur,
Hyderabad 500081
Phone: +91 40 4064 4064

You can also reach us at Salesforce.Support@damcogroup.com for your queries and issues.