



Many2Many
November 2019

Table of Contents

Overview	3
Using Many2Many	4
Opening & closing the tag catalog	4
Searching for tags	5
Selecting multiple tag records	5
Adding multiple rows of tags	6
Displaying long text tags	6
Removing tags	7
Installation & Configuration	8
Installation	8
Junction Object Configuration	8
Create a Tag Setting	11
Naming the Tag Settings Record	11
Setup Wizard	11
Filtering on Catalog, Target, and Child Object Records	15
Archive Mode	18
Add Many2Many to Lightning Pages	19
Setting up Many2Many in Flow	20
Setting up Many2Many for Salesforce Mobile	24
Create an Object-Specific Action	24
	1



Create a Global Action	29
Tag Records & Create Reports	32
Tag Records	32
Report on Tags	32
Field Map	33
Set User Permissions	34
Junction Object-level permissions	35
Lightning Page-level permissions	35
Many2Many-level permissions	35
Read Only	35
Read and Add New	36
Read and Remove	36
Full Access	37



Overview

Built as a Lightning Component, Many2Many can be added to any Lightning Page for use by any End User to auto-create junction records between any two objects. On install, the system admin will create Tag Settings records and configure the junction objects.

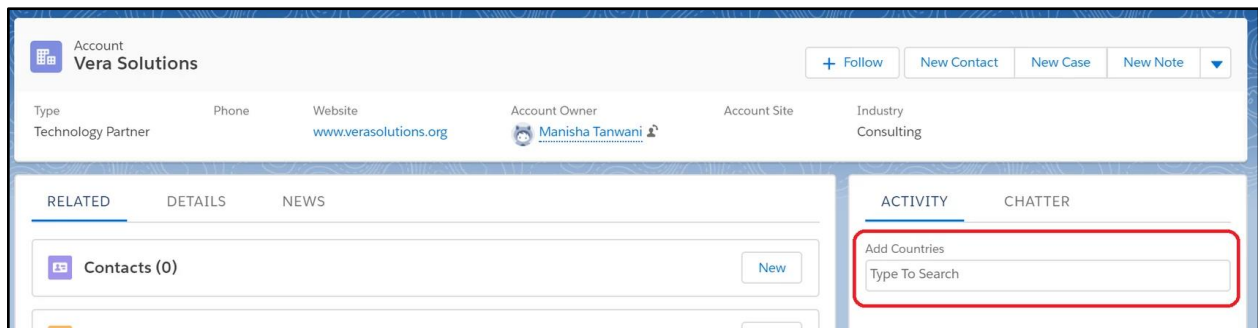


Figure: Sample Lightning record page to view the Many2Many component after completing setup.

Many2Many allows users to:

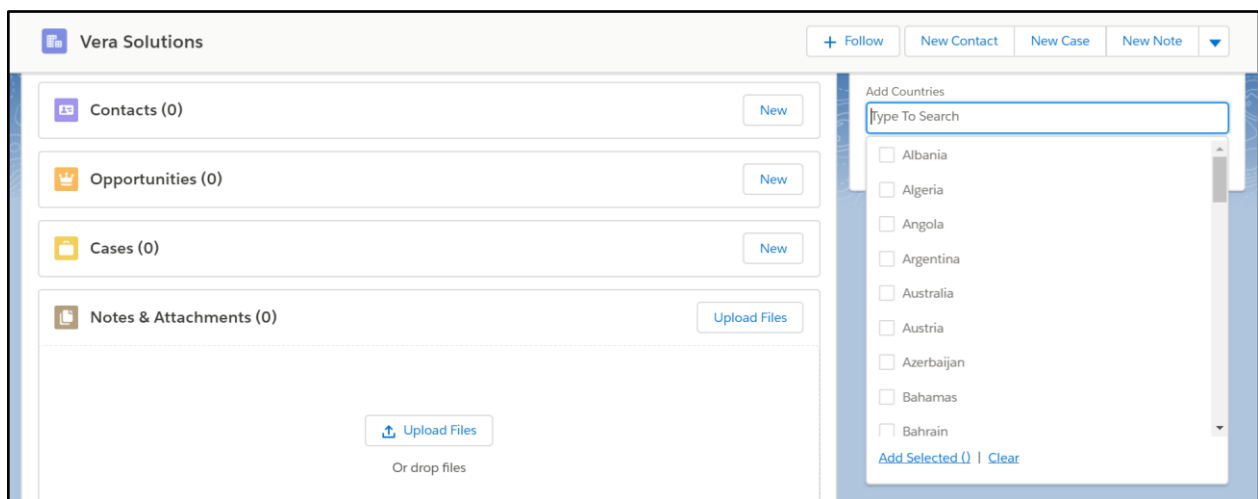
1. Assign tags from one object to another.
2. Use a type-ahead search box.
3. Select one or multiple tags through a drop-down catalog of available records. Users can select relevant tags using two options:
 - a. Use type-ahead search to find the relevant option(s) and then check the checkbox next to that option
 - b. Scroll down the list and check the box for one or more options
4. Add the selected options by clicking on “Add Selected”. This displays the number of options selected in ().
5. View selected tags as pills that a) can be deleted by clicking on the “x” and b) are hyperlinked to a relevant detail page.



Using Many2Many

Opening & closing the tag catalog

Users open the dropdown catalog of tags by clicking into the search box. This displays a scrollable, alphabetized list of the first 50 available tags, with the first 9 visible immediately in the dropdown.



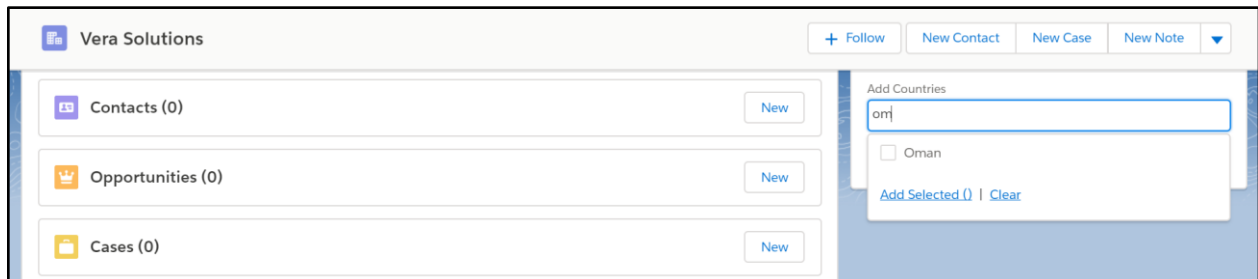
Users close the dropdown catalog of tags by clicking outside the area of the entire Lightning component.

If any tags were selected from the dropdown catalog and the user doesn't click on "Add Selected" but instead closes the component, that selection will be preserved when the catalog is re-opened. This will happen unless the page is refreshed.



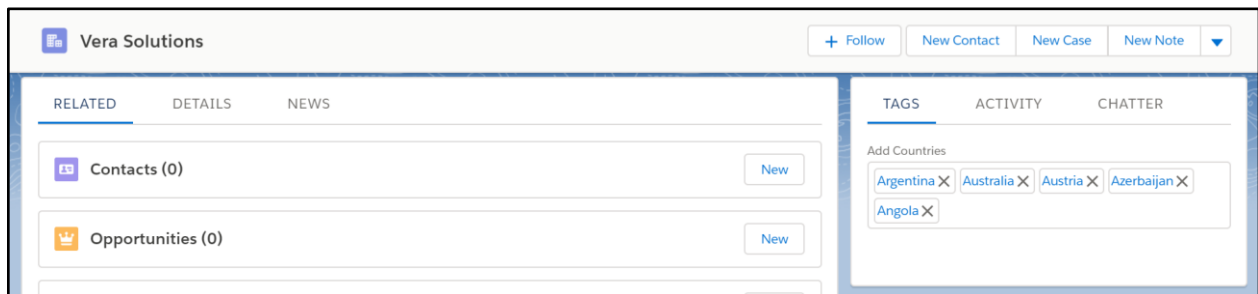
Searching for tags

When typing into the search box to filter tags, Many2Many will display only available tag records that start with the same string as entered in the search box, and not available tags that contain the string. For example, if a user enters “om” into the search box setup to tag countries, **Oman** will show up in the filtered available tags, but not **Comoros** or **Somalia**.

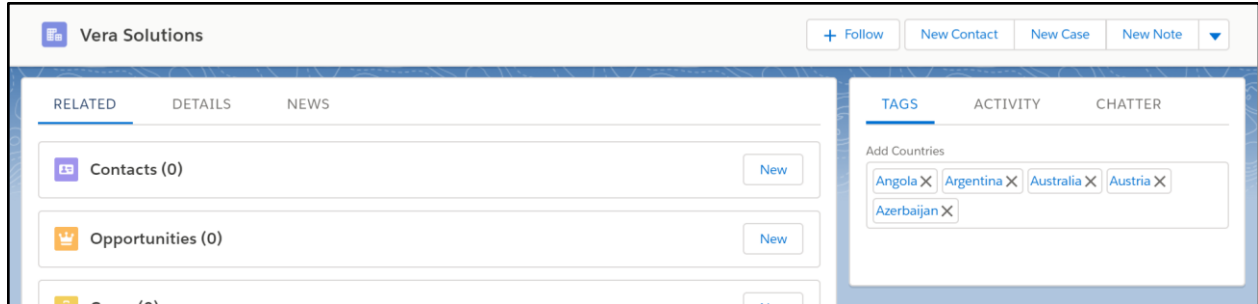


Selecting multiple tag records

When a user selects multiple tags and clicks “Add Selected”, the tags are created and added to the container as pills in the order in which they were selected.



On refresh of the page, the list of tag pills will re-render such that the newly created tags and any previously created tags are all listed in alphabetical order.



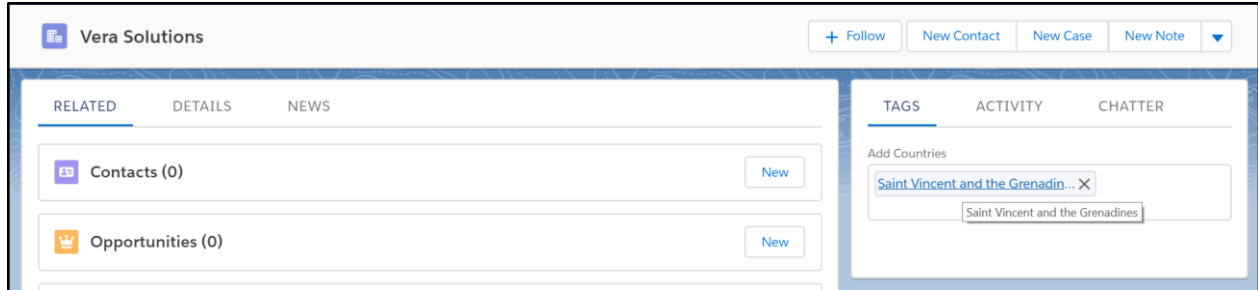
Adding multiple rows of tags

The pill container expands when adding multiple rows of tag pills. Because the pill container must also accommodate the input search box, it may expand one row beyond the rows of pills, depending on the position of the last pill.



Displaying long text tags

Tags longer than 30 characters are displayed with the first 30 characters, followed by ellipses. To see the full text for a tag, hover over the tag pill.



Removing tags

Users remove tags from the component by clicking on the X in the tag pill.



By default, when a user clicks on the X in the tag pill, the junction record is deleted and placed in the Recycle Bin.

Many2Many also supports archiving of tags - that is, the removal of tags from the component without deleting the junction record. Users can activate this functionality by selecting the *Archive Mode* checkbox on Tag Settings.



Installation & Configuration

Installation

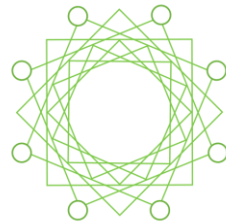
1. Install the Many2Many Package into your [chosen environment](#) using the installation link provided below. Select the option that grants package access to all users.
 - a. [Install for Production](#)
 - b. [Install for Sandbox](#)

❶ If My Domain has already been set up, replace “test” or “login” in the installation links with the specific domain for the org.

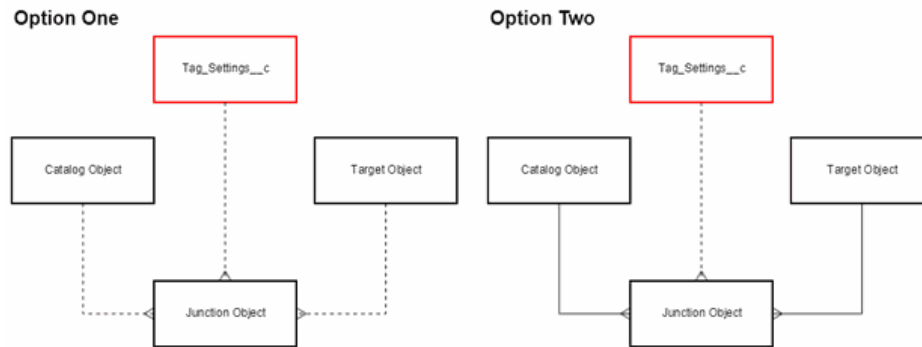
2. For security purposes, Salesforce requires you to [activate MyDomain in order to use Lightning Components](#).
 - a. Learn more about how MyDomain works and how to set it up [here](#). *Please note that it can take up to 30 minutes for MyDomain to activate, depending on the complexity of your system.*
3. Once the package is installed into your Salesforce instance, assign the Many2Many Admin permission set to the admin(s) who will be configuring Many2Many. This will give them modify access for all Many2Many objects (i.e. Tag_Settings__c).

Junction Object Configuration

Functionally, this tool creates a junction between two records of different objects. To use this tool, you may configure your objects in several ways (outlined below). The Tag Settings object, highlighted in red, is installed as part of the package.



MANY 2 MANY



From these object models, you can see that you'll need a many-to-many relationship between the two objects you want to use for tagging. This can be achieved through a separate junction object.

You should select one or any combination of the above object models based on the system's overall data model. The Many2Many currently supports two models, so you can make a decision based on reporting needs and/or object limitations.

One important consideration when creating the junction object is the user permissions (See [Set User Permissions](#) section) that need to be in place.

Name Field: The junction object's Name field must be set as an Auto-number field. Otherwise, if you set it as a Text field, you will need additional custom development for the Name to populate correctly on creation of each record.

Lookup to Tag Settings: You must create a lookup relationship between your junction object and the Tag Settings Object.

Archive Mode: If you decide to use Archive Mode on your tags, you will need to create two date fields on your junction object(s):

- **Tag Date:** This field will populate with the date when a tag is added through the component and Archive Mode is enabled. If a tag is removed and then added again, this field will re-populate with the most recent add date.
- **Archive Date:** This field will populate with the date when a tag is removed through the component and Archive Mode is enabled. If a tag is removed and then added again, this field will become blank until the tag is again removed.



Once the package is installed and you have configured each object correctly, you can move to the next section: [*Create Tag Setting Records*](#).



Create a Tag Setting

Tag Settings records define the parameters for the tagging interface seen on this page, including which objects the component appears on, which objects' records populate the MSPL values, and filtering of those records.

Naming the Tag Settings Record

We recommend a consistent format when naming Tag Settings records in order to clarify to the client System Admins what a particular Tag Settings record accomplishes.

In general, when naming the Tag Settings, the record should follow this format: “Tag {TargetObject} with {CatalogObject}s” (e.g. “Tag Project with Countries” for a Tag Setting record that allows the user to create Country tags on the Project object).

Setup Wizard

Instead of manually filling out the Details tab, users may use the setup wizard to populate API names. Please ensure the Junction Object has been configured before moving onto the setup wizard.

This tool dynamically displays a dropdown list of compatible standard and custom objects in the system. All custom objects will be included. The standard objects include:

- Account
- Asset
- Campaign
- CampaignMember
- Case
- Contact
- Contract
- Event
- Lead
- Opportunity
- OpportunityLineItem
- Order
- OrderItem
- PricebookEntry
- Product2
- Task
- User



In the example below, the Contact Full Name will be tagged onto the Account Name which creates an Account Contact record between the two. Users can begin by selecting the Target Object which will be tagged by the Catalog Object.

This is a screenshot of a web application interface titled "Tag Settings" with a sub-header "Tag Contact to Account". It has two tabs: "Setup" (active) and "Details". Under the "Setup" tab, there is a "Tag Setting Wizard" section. It contains three main fields: "Catalog Object" with a dropdown menu showing "Contact", "Catalog Object Display Field" with a dropdown menu showing "Full Name", and "Catalog Header Label" with a text input field containing "Tag Contact". Below these fields is a "Which Records?" section with two radio buttons: "All Records" (selected) and "Some Records". A blue "Next" button is located at the bottom right of the form.

The *Select field to display* dropdown enables users the flexibility to select what field to tag onto the Target Object.

The *Header Label* displays above the tagging component in the Account record itself, as shown in the screenshot below.

This screenshot shows a tagging component within an account record. At the top, the text "Contact Full Name" is displayed and highlighted with a red rectangular box. Below this text is a large, empty rectangular input field with a blue border. At the bottom of the component, there is a list of items, each preceded by a checkbox. The first item is "Brinda Shah", which is currently unchecked.



After clicking *Next*, the following screen will display the same interface for users to then select the Catalog Object.

 Tag Settings

Tag Contact to Account

Setup

Details

Tag Setting Wizard

Target Object

Account

Target Object Display Field

Account Name

Target Header Label

Tag Account

Which Records?

☒ All Records

☐ Some Records

Previous

Next



The final screen of this Flow is to link the Catalog and Target Objects to the Junction Object, as shown in the screenshot below.

The screenshot shows a web interface for configuring tag settings. At the top, there's a header with a red globe icon, the text "Tag Settings", and the title "Tag Contact to Account". Below the header, there are two tabs: "Setup" (which is active and underlined) and "Details". The main content area is titled "Tag Setting Wizard". It contains six dropdown menus arranged in three rows. The first row has "Junction Object" set to "Account Contact" and "Junction's Tag Setting Field" set to "Tag Settings". The second row has "Junction's Catalog Field" set to "Contact" and "Junction's Target Field" set to "Account". The third row has "Junction's Tag Date Field" set to "Tag Date" and "Junction's Archive Date Field" set to "Archive Date". At the bottom right, there are two buttons: "Previous" (disabled) and "Next" (active).

① **Note:** While the options in the drop-down display the object/field label, the actual value stored in the Tag Settings record is the object/field API Name.

Upon clicking Next, users can return to the *Details* tab and see all necessary fields are now populated.



Filtering on Catalog, Target, and Child Object Records

From the same setup wizard, a system admin may apply filters to the Catalog, Target and Junction object records to display only the relevant records to an organization's use case.

On the Flow tab on the Tag Settings record, users may select *Some Records*. Doing so will prompt additional fields to display, in which the user may specify *AND*, *OR* filter logic, as shown in the screenshot below.

A screenshot of a user interface for selecting filter logic. It contains two sections. The first section, labeled "Which Records?", has two radio button options: "All Records" (which is unselected) and "Some Records" (which is selected with a blue dot). The second section, labeled "Specify Filter Logic", contains a dropdown menu that currently displays the word "AND".

The dropdown for specifying filter logic defines how the following criteria will be applied to the records. The table below displays the two available options, *AND* and *OR*.

Filter Logic Definitions

Operator	Definition
AND	Finds records that match all of the record field types selected. This filter applies in conjunction with the available field type filter operators described below.
OR	Finds records that match any of the record field types selected. This filter applies in conjunction with the available field type filter operators described below.



After specifying filter logic, system admins may choose one of several available operators for the selected field as shown below.

Specify Filter Logic

AND

Where

Contact ID

equals

contains

0036g000002gft3AAA

+

Email

@verasolutions.org

+

🗑️

The following table includes the supported field types and its corresponding operator:

Supported Field Types and Available Operators for Filter

Field Type	Available Operators
Date	equals, not equal to, less than, greater than, less or equal, greater or equal
Number (Integer, Double, Currency, Percent)	equals, not equal to, less than, greater than, less or equal, greater or equal
Phone	equals, no equal, contains, not contain, start with
Text	equals, no equal, contains, not contain, start with
Picklist	equals, no equal, contains, not contain, start with
Multiselect Picklist	equals, no equal, contains, not contain
URL	equals, no equal, contains, not contain, start with
Reference	equals, no equal, contains, not contain, start with



Boolean	equals, not equal
Id	equals, no equal, contains, not contain, start with
Email	equals, no equal, contains, not contain, start with
RecordType Name	equals, no equal, contains, not contain, start with

Additionally, users may filter child object records by up to two different child objects as shown below. The same filter logic specified above also applies to the child objects.



Archive Mode

Tags are automatically set to delete the junction record on removal of tag from the tagging component. If tags need to be archived for reporting purposes, ensure that the **Archive Mode** checkbox field is selected as TRUE, as shown in the screenshot below.

A screenshot of a user interface element. It consists of a rectangular box with a light gray background. Inside the box, the text "Archive Mode" is displayed in a dark gray font, followed by a small circular information icon (an 'i' inside a circle). Below the text, there is a checkbox that is currently checked, indicated by a small checkmark inside the box.

When Archive Mode is activated, the following fields must be populated:

- **Junction Object Tag Date Field:** The date field on the junction object that is populated whenever a tag is added through the component in Archive Mode.
- **Junction Object Archive Date Field:** The date field on the junction object that is populated whenever a tag is removed through the component in Archive Mode.

① Note: While the options in the drop-down display the object/field label, the actual value stored in the Tag Settings record is the object/field API Name.

See screenshot below for reference.

A screenshot showing two side-by-side dropdown menus. The left dropdown is titled "Junction's Tag Date Field" and has "Tag Date" selected. The right dropdown is titled "Junction's Archive Date Field" and has "Archive Date" selected. Both dropdowns have a small upward and downward arrow icon on the right side.

Both the Tag Date and Archive Date fields may be added to the Junction Object as custom fields from Object Manager.

If you try to save your Tag Settings record while Archive Mode is TRUE but either Junction Object Tag Date Field or Junction Object Archive Date Field is not populated, then a validation rule will give you an error message notifying you that the two fields must be populated.

For additional details on the Tag Setting object, you may refer to the [Field Map](#) section.



Add Many2Many to Lightning Pages

1. Open the Lightning App Builder (for access instructions, see here: [Lightning App Builder](#))
2. Locate *TaggingUI* under Custom - Managed and place on page layout
3. Configure the following fields as needed, see below for reference:
 - a. **Tag Setting Ids.** Enter the unique Salesforce Id of the Tag Setting record. Add multiple, comma- separated Ids if your users need to be tagging multiple object records.
 - b. **Tag Record Id.** This field is only required if component is added to Lightning page that is not a record page. Enter the unique Salesforce Id of the object record to which tags will be added.
 - c. **Add Tag?** Select if users need to be able to create tags.
 - d. **Remove Tag?** Select if users need to be able to remove tags.

A screenshot of the configuration interface for the 'TaggingToolComponent' in the Lightning App Builder. The breadcrumb at the top reads 'Page > TaggingToolComponent'. There are four configuration fields, each with an information icon (i) to its right. The first field, 'Tag setting Ids', contains the text 'a007F0000040gFTQAY'. The second field, 'Tag record Id', is empty. The third field, 'Add Tag?', has a checked checkbox. The fourth field, 'Remove Tag?', also has a checked checkbox.

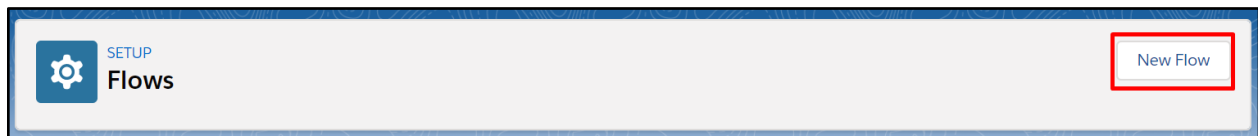
2. Set [Activation](#) based on user requirements to customize user permissions.



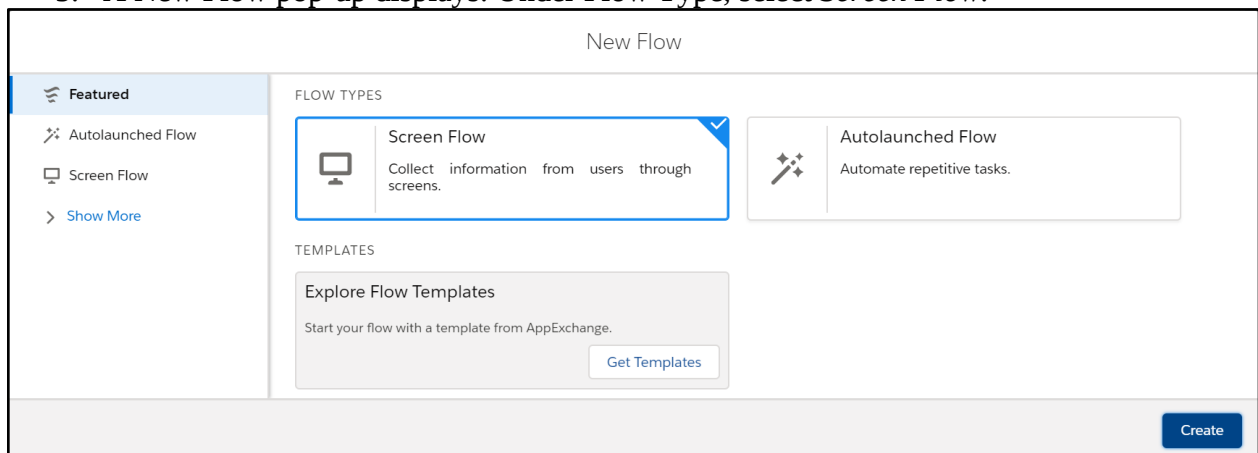
Setting up Many2Many in Flow

Many2Many's functionality can be accessed as a component via Salesforce Flow instead of a Lightning Record page.

1. To set up the Many2Many Lightning Component in Flow, navigate to Setup.
2. Using the Quick Find search bar, type *Flows*.
3. Select *Flows* under Process Automation.
4. Click *New Flow*, as shown in the screenshot below.

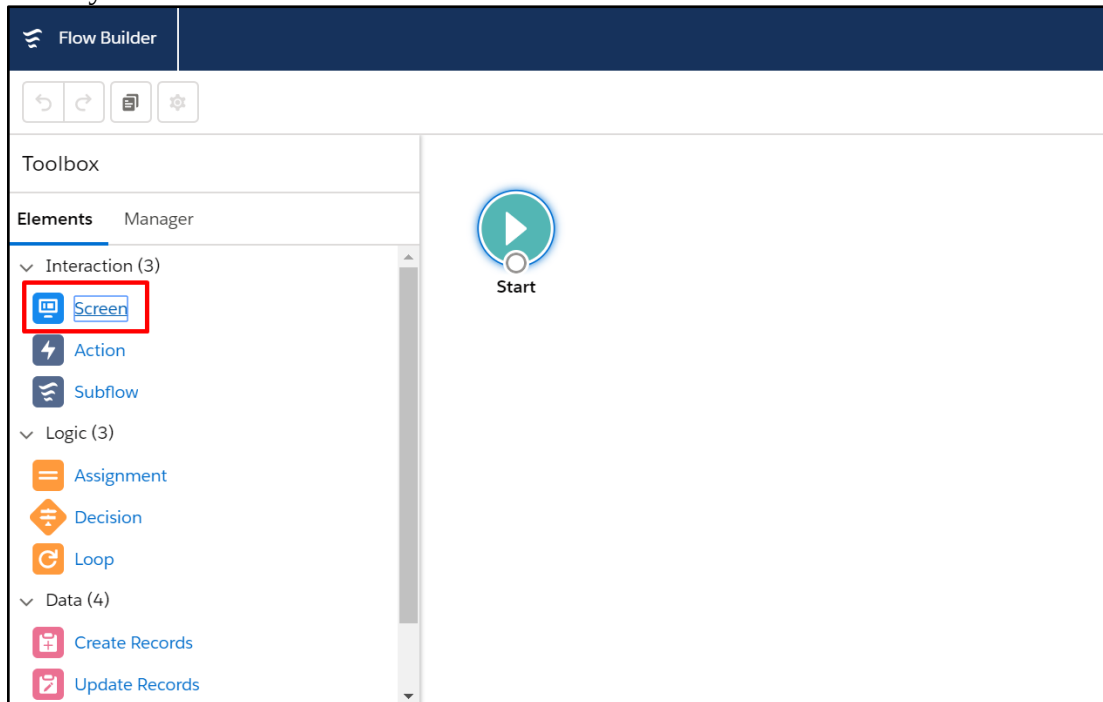


5. A New Flow pop-up displays. Under Flow Type, select *Screen Flow*.

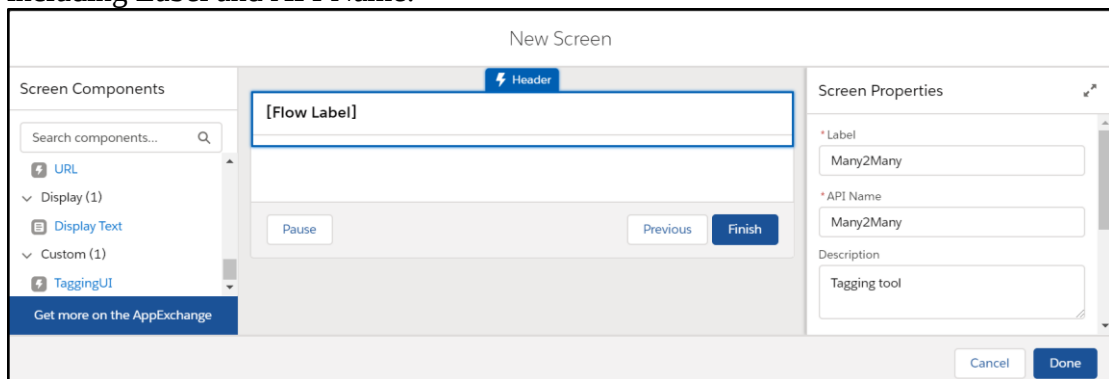




6. On the Flow Builder, drag the Screen element, as highlighted below in the screenshot, directly onto the interface where the *Start* is.

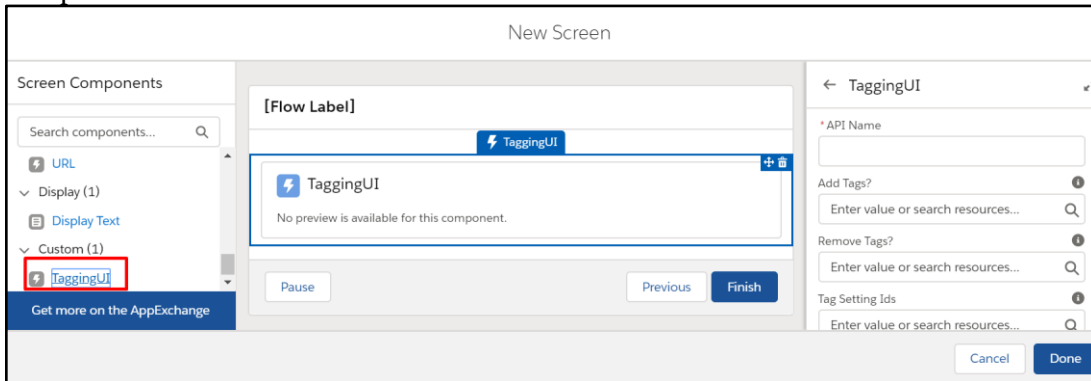


7. A New Screen pop-up displays. Click into *Flow Label* to edit its screen properties including Label and API Name.

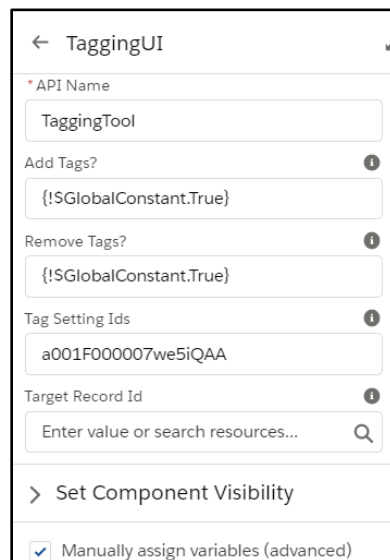




8. Search for the *TaggingUI* component under Custom Components. Drag and drop the component under the *Flow Label*.



9. In the right-hand side, complete the following fields. Note that the asterisked field indicates that it is required.
 - a. API Name: TaggingTool
 - b. Add Tags?: {!\$GlobalConstant.True}
 - i. Setting this field as TRUE enables users to add tags
 - c. Remove Tags?: {!\$GlobalConstant.True}
 - i. Setting this field as TRUE enables users to delete tags





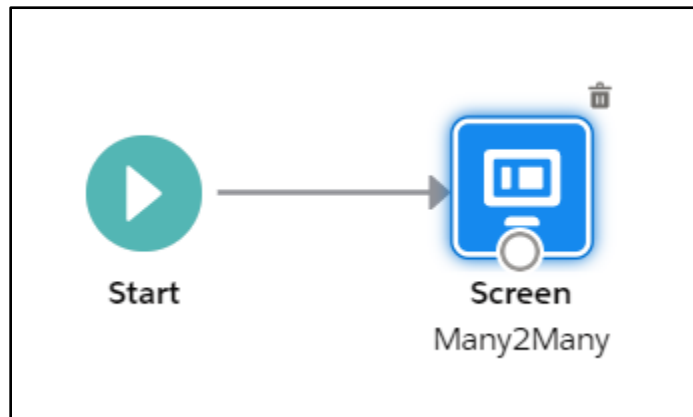
10. To identify the Tag Settings ID, go into the Tag Settings object and select which record to display in the Lightning component.

11. In the address bar of the Tag Setting record, copy and paste the unique record ID that displays after the object API name. See screenshot below.

lightning.force.com/lightning/r/tag__Tag_Settings__c/a001F000007we5iQAA/view

12. Return to the New Screen pop-up. Click *Done*.

13. In Flow Builder, click on *Start* and drag the white circle that appears below the icon until it forms an arrow to connect with the *Screen* component. Refer to the screenshot below.



14. Click *Save*.

15. Click *Activate*.



Setting up Many2Many for Salesforce Mobile

Many2Many can be set up from the web by following the instructions provided in [Create a Tag Setting](#). Additional configuration is needed to optimize Many2Many for mobile users.

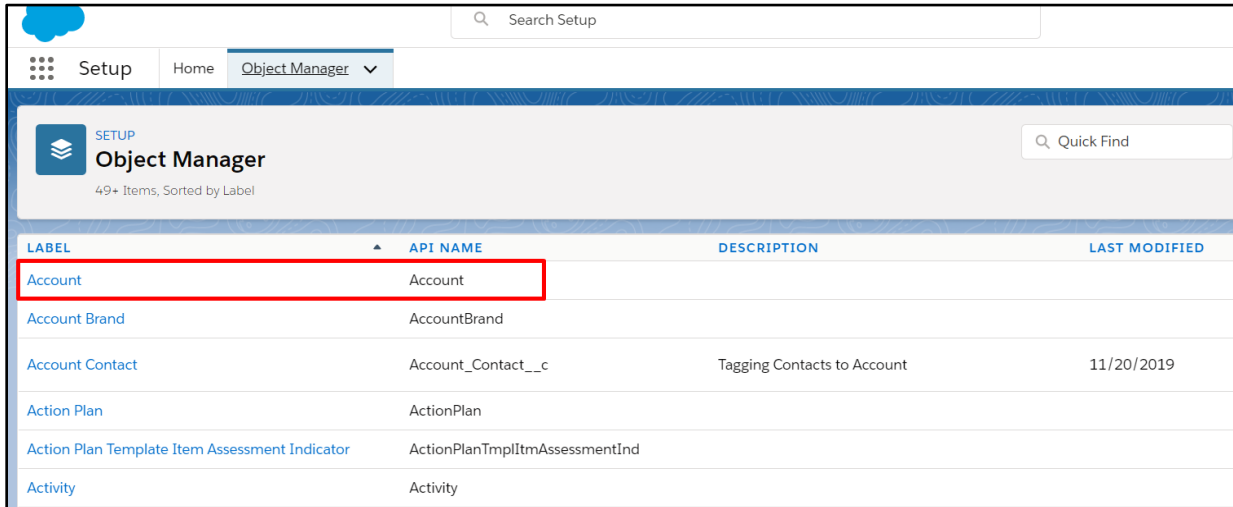
System Admins have the option to set up Many2Many for mobile from an object relevant to their organization's use case, or as a Global Action. The key difference is that object-specific actions can only be added to record detail pages, since they are associated with a specific object. Global Actions can be placed anywhere actions are supported, including record detail pages or Chatter groups. Global Actions enable users to create object records, but the new record has no relationship with other records.

Create an Object-Specific Action

1. Before starting, please review steps for creating Tag Settings and ensure Many2Many setup is complete for web.
2. Navigate to Setup.
3. Click on Object Manager.



4. Select the object where Many2Many will display. In the example below, Many2Many will be configured on the Account object.

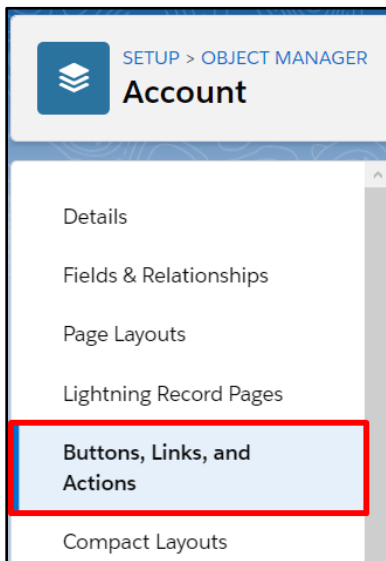


The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with "Setup", "Home", and "Object Manager" (selected). Below this, the "Object Manager" section is displayed, showing a list of objects. The "Account" object is highlighted with a red box. The table below lists several objects with their API names, descriptions, and last modified dates.

LABEL	API NAME	DESCRIPTION	LAST MODIFIED
Account	Account		
Account Brand	AccountBrand		
Account Contact	Account_Contact__c	Tagging Contacts to Account	11/20/2019
Action Plan	ActionPlan		
Action Plan Template Item Assessment Indicator	ActionPlanTplItemAssessmentInd		
Activity	Activity		



5. On the left-hand pane, click *Buttons, Links, and Actions* as shown below.



6. Click *New Action*.



7. Complete the fields as shown below. Please note the following fields are mandatory:
 - a. Action Type: Lightning Component
 - b. Lightning Component: tag: TaggingUI
 - c. Height: 250px
 - i. This is the default value and may be customized.
 - d. Label: Tag Contact to Account
 - i. This may be customized to the object and use case of your organization.
 - e. Name: Tag_Contact_to_Account
 - i. This automatically populates when *Label* is inputted.

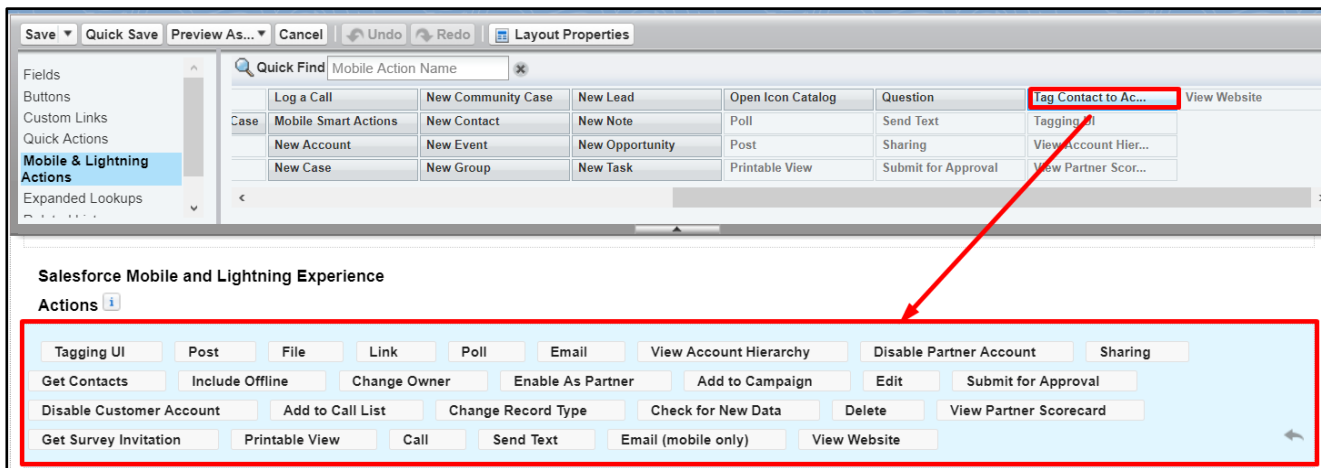
A screenshot of the 'New Action' form in Salesforce. The form is titled 'Account Actions' and 'New Action'. It has a header 'Enter Action Information' with 'Save' and 'Cancel' buttons. The form fields are: 'Object Name' (Account), 'Action Type' (Lightning Component), 'Lightning Component' (tag:TaggingUI), 'Height' (250px), 'Standard Label Type' (--None--), 'Label' (Tag Contact to Account), 'Name' (Tag_Contact_to_Account), 'Description' (empty), and 'Icon' (Change Icon). Each field has an information icon (i) next to it. At the bottom, there are 'Save' and 'Cancel' buttons.

8. If desired, Standard Label Type, Description, and Icon may be customized.
9. Click *Save*.
10. On the left hand pane, click Page Layouts.



11. Click Mobile and Lightning Actions.

12. Drag and drop the *Tag Contact to Account* action from Step 7 to the Salesforce Mobile and Lightning Actions section. See screenshot below for reference.



13. Click Save.



Create a Global Action

1. Before starting, please review steps for creating Tag Settings and ensure Many2Many setup is complete for web.
2. Navigate to Setup.
3. Using Quick Find, search for *Global Actions*.
4. Click *New Action* as shown below.

Global Actions

Create, edit, and view global actions, which can be used on detail pages, the home page, and the Chatter tab.

Actions

New Action



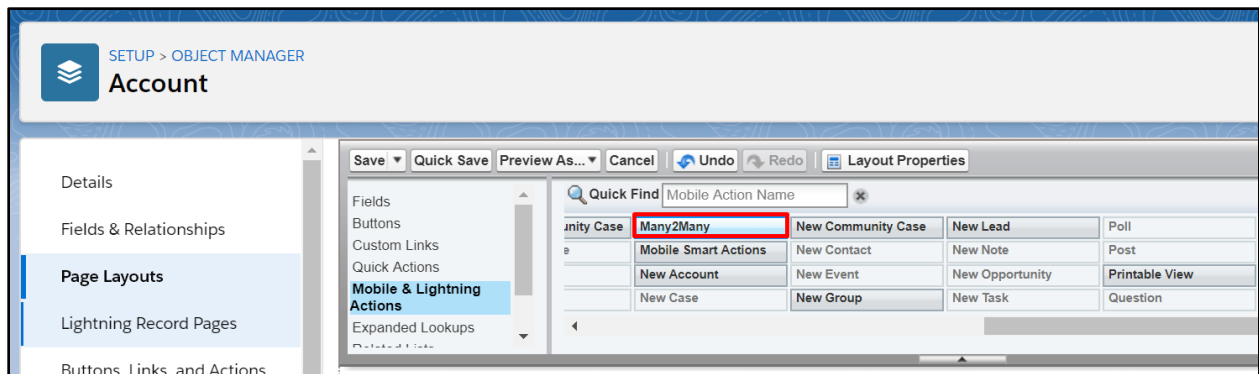
5. In Enter Action Information, the following fields are mandatory:
 - a. Action Type: Lightning Component
 - b. Lightning Component: TaggingUI
 - c. Label: Many2Many
 - i. This may be customized per use case, such as Tag Countries.
 - d. Name: Many2Many
 - i. If customized, the name may be Tag_Countries.

A screenshot of a software dialog box titled "Enter Action Information". It has "Save" and "Cancel" buttons in the top right corner. The dialog contains several input fields: "Action Type" is a dropdown menu set to "Lightning Component"; "Lightning Component" is a dropdown menu set to "c:TaggingUI" with an information icon; "Height" is a text input field set to "250px" with an information icon; "Standard Label Type" is a dropdown menu set to "--None--" with an information icon; "Label" is a text input field set to "Many2Many"; "Name" is a text input field set to "Many2Many" with an information icon; "Description" is a text input field set to "Tagging tool" with an information icon; and "Icon" is a section with a lightning bolt icon and a "Change Icon" link.

6. If desired, Standard Label Type, Description, and Icon may be included or customized.
7. Click *Save*.
8. Return to Setup.
9. Navigate to Object Manager.
10. Select the Target Object from Object Manager.
11. Navigate to the Page Layout of the Target Object.



12. On Page Layout, click into Mobile & Lightning Actions, and locate the custom action *Many2Many*. See screenshot below.
 - a. If the Quick Action was given a custom label, then the Quick Action name would follow accordingly.



13. Drag the *Many2Many* Action under the Salesforce Mobile and Lightning Experience Actions header, as shown below.



14. Click Save.



Tag Records & Create Reports

Tag Records

Once a Tag Settings record has been created and the Lightning component has been added to at least one of the Catalog or Target object's detail pages, users can begin tagging records.

To get started, open the detail page of a Catalog or Target object record. Click into the Many2Many component and begin typing to search for an available tag. Once you have selected the tag you want to create, click the “Add Selected” button. To delete/archive any tags, click the “X” next to the tag label in the pill.

For more information on creating, editing and deleting tags, refer to the [Using Many2Many](#) section of this guide.

Report on Tags

Salesforce details how to report on many-to-many relationships in [the final section of this page](#). When creating a report on two Objects related to each other using Many2Many, you may need to create a Custom Report Type in Setup. Keep in mind that when creating the Report Type, you will only be able to add one parent object (either Catalog or Target) and the junction object. You will be able to add fields from the second parent object by using the lookup on the junction object, as detailed in [Step 4 here](#).



Field Map

Field Label	Field Name	Type	Help Text
Archive Mode	tag__Archive_Mode__c	Checkbox	Select if you want to enable Archive Mode, i.e. allow users to remove tags without deleting the junction records.
Catalog Filter Logic	tag__Catalog_Filter_Logi c__c	Long Text Area(32768)	
Catalog Header Label	tag__Catalog_Header_La bel__c	Text(255)	Header label for Tagging Tool component on Target object (i.e. header label for Catalog records)
Catalog Object	tag__Catalog_Object__c	Text(50)	API name of Object that is the source catalog for tagging (e.g. Geographic_Area__c)
Catalog Object Rollup Field	tag__Catalog_Object_Rol lup_Field__c	Text(255)	API name of field on the Catalog Object that user would like to see as comma separated values (e.g. Name)
Catalog Object Display Field	tag__Catalog_Object_Dis play_Field__c	Text(50)	API name of field on the Catalog Object that user would like to see as dropdown picklist value (e.g. Name)
Junction Object	tag__Junction_Object__c	Text(50)	API name of the junction Object between Catalog and Target (e.g. Project_Contact_Junction__c)
Junction Object Archive Date Field	tag__Junction_Object_Ar chive_Date_Field__c	Text(255)	API name of the field on the junction Object that stores the Archive Date of a tag (e.g. Archive_Date__c)
Junction Object Catalog Field	tag__Junction_Object_Ca talog_Field__c	Text(50)	API name of the field on the junction Object that stores the Id of the Catalog Object (e.g. Country__c)
Junction Object	tag__Junction_Object-Ta	Text(255)	API name of the field on the junction



Tag Date Field	g_Date_Field__c		Object that stores the Tag Date of a tag (e.g. Tag_Date__c)
Junction Object Tag Setting Field	tag__Junction_Object_Tag_Setting_Field__c	Text(50)	API name of the field on the junction Object that stores the Id of the Tag Settings Object (e.g. Tag_Settings__c)
Junction Object Target Field	tag__Junction_Object_Target_Field__c	Text(50)	API name of the field on the junction Object that stores the Id of the Target Object (e.g. Account__c)
Tag Settings	tag__Tag_Settings__c	Lookup(Tag Settings)	
Tag Settings Name	Name	Text(80)	
Target Filter Logic	tag__Target_Filter_Logic__c	Long Text Area(32768)	
Target Header Label	tag__Target_Header_Label__c	Text(255)	Header label for Tagging Tool Component on Catalog object (i.e. header label for Target records)
Target Object	tag__Target_Object__c	Text(50)	API name of object to be tagged (e.g. Project__c)
Target Object Display Field	tag__Target_Object_Display_Field__c	Text(50)	API name of field on the Target Object that user would like to see as dropdown picklist value (e.g. Name)
Target Object Rollup Field	tag__Target_Object_Rollup_Field__c	Text(255)	API name of field on the Target Object that user would like to see as comma separated values (e.g. Name)



Set User Permissions

Junction Object-level permissions

If a User will be using the Many2Many, they will need CRUD access enabled for the Junction Object(s) that will have records created by the Many2Many. If CRUD access is not enabled, Users may encounter an error when using the Many2Many.

Note: Modify All permission must be granted for users who wish to add and delete tags created by other users.

Lightning Page-level permissions

Access to Many2Many is controlled at the Lightning Page level by adding the Many2Many to a Lightning Page and then enabling/restricting access to that page. For more information on how to enable or restrict access to a Lightning Page, read [this page on activation](#).

Many2Many-level permissions

Many2Many allows a System Administrator to determine whether Users who have read access to the component will also have the ability to add and/or remove tags. This is controlled from the Lightning App Builder menu.

See below for the different options of configuration for the Many2Many's Add/Remove capabilities.

Read Only

Users can only view created tags and open hyperlinks to see record details. Users cannot remove tags that have been created. Users do not have access to the catalog of available tags.

Tag Countries

India

Nepal

Pakistan



Read and Add New

Users can access catalog of available tags and add them to a record. Users can view created tags and open hyperlinks to see record details. Users cannot remove tags that have been created.

Tag Countries

India

Nepal

Pakistan

☐ Afghanistan

☐ Albania

☐ Algeria

☐ Angola

☐ Argentina

☐ Armenia

☐ Aruba

☐ Australia

☐ Austria

[Add Selected \(\)](#) | [Clear](#)

Read and Remove

Users can view created tags and open hyperlinks to see record details. Users can remove tags that have been created. Users do not have access to the catalog of available tags.

Tag Countries

India X

Nepal X

Pakistan X



Full Access

Users can view catalog of available tags and add them to a record. Users can view created tags and open hyperlinks to see record details. Users can remove tags that have been created.

Tag Countries

India X

Nepal X

Pakistan X

☐ Afghanistan

☐ Albania

☐ Algeria

☐ Angola

☐ Argentina

☐ Armenia

☐ Aruba

☐ Australia

☐ Austria

[Add Selected \(\)](#)

[Clear](#)