

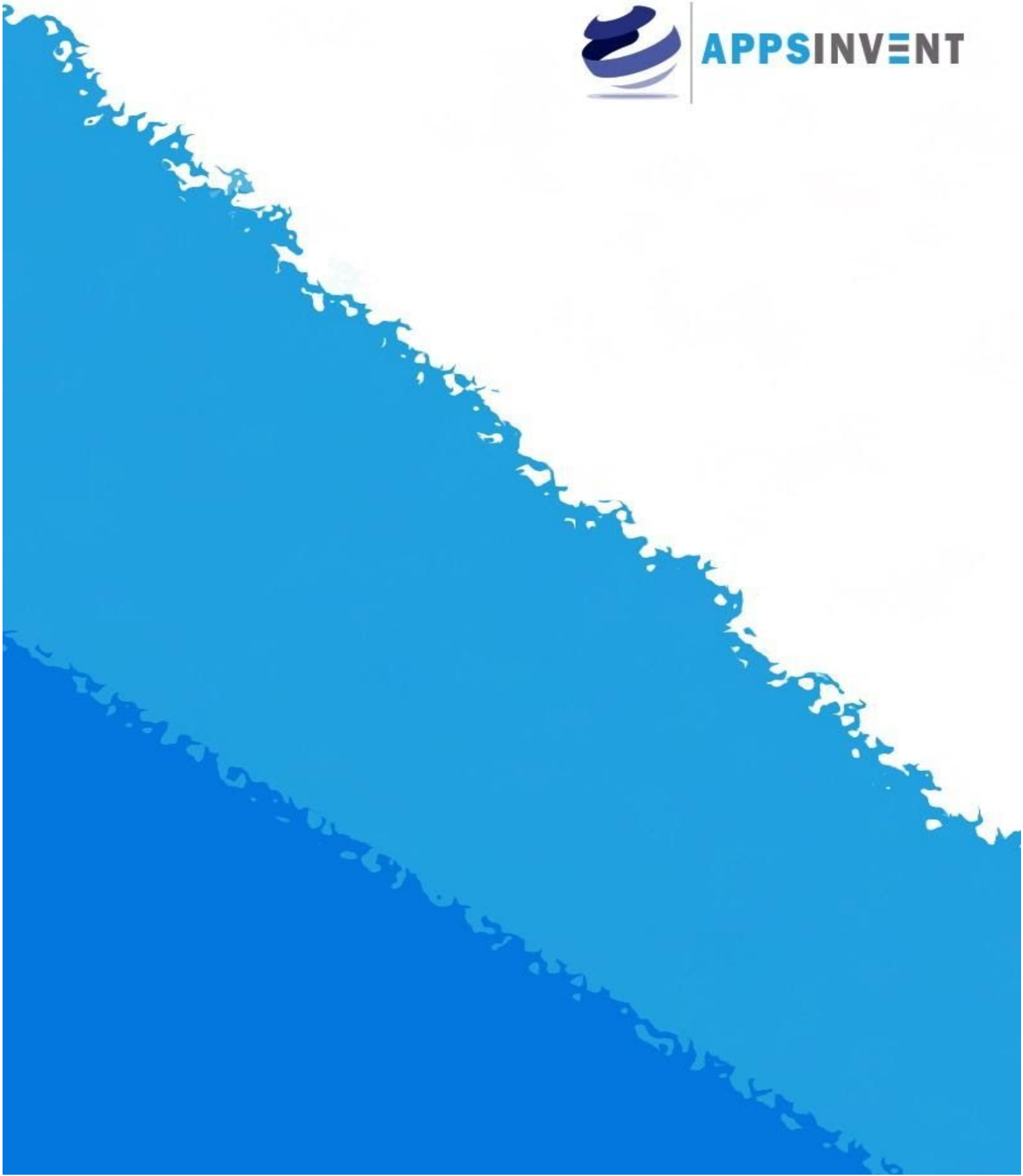


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Install

Install the product from AppExchange

Where do you want to install this package?

Before you install in a production org, we suggest testing in a sandbox.

Install in a Production Environment

Install where you or your users work, including developer orgs.

[Install in Production](#)

Install in a Sandbox

Test in a copy of a production org.

[Install in Sandbox](#)

[Cancel](#)

Provide your credentials for sandbox or production.


Install Record Grid View
 By APPSInvent Inc.


☐ Install for Admins Only


☒ Install for All Users


☐ Install for Specific Profiles...

Install

Cancel

App Name	Publisher	Version Name	Version Number
Record Grid View	APPSInvent Inc.	April 2020	1.2

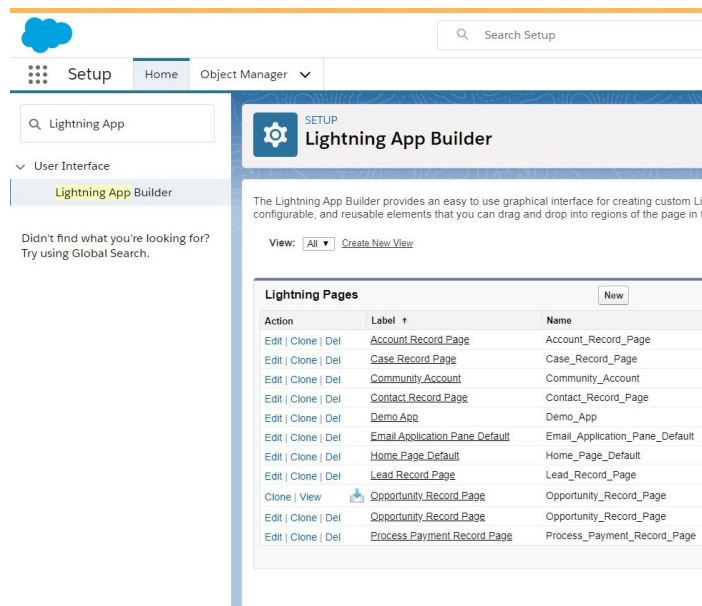
Description
Record Grid View, will show you all your records in one page and you can view and edit the record without leaving the list of the record.

[Additional Details](#) [View Components](#)

It might take some time to install sometimes. Wait for the email to confirm it's installed without any issues.

Adding the component to the home page

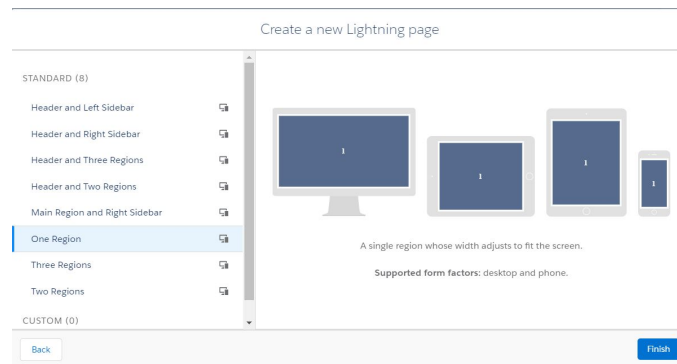
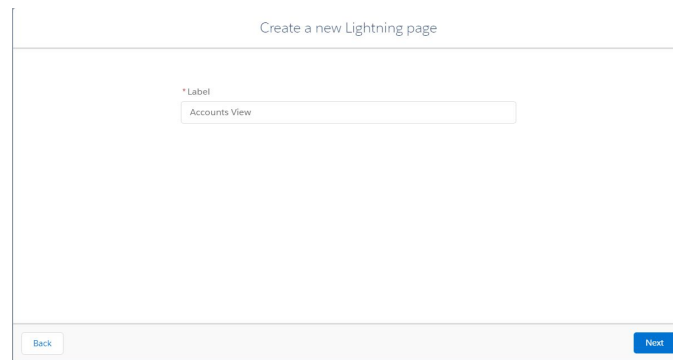
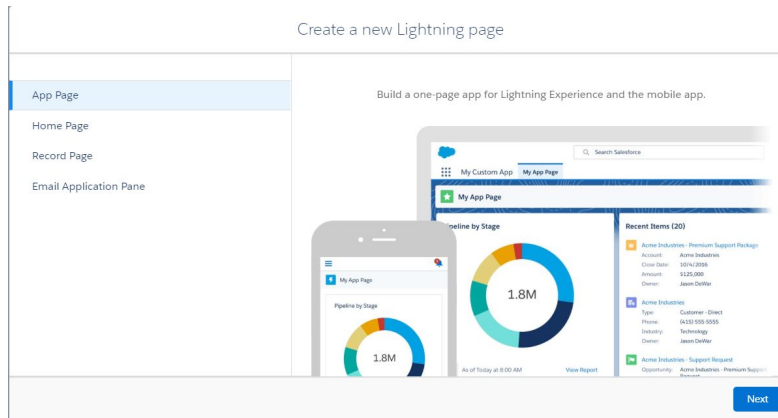
Go to settings as an administrator and find Lightning App Builder:



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "Lightning App" entered. Under "User Interface", "Lightning App Builder" is selected. The main content area shows the "Lightning App Builder" setup page. It includes a "View:" dropdown set to "All" and a "Create New View" link. Below this is a table titled "Lightning Pages" with a "New" button in the top right corner.

Action	Label ↑	Name
Edit Clone Del	Account Record Page	Account_Record_Page
Edit Clone Del	Case Record Page	Case_Record_Page
Edit Clone Del	Community Account	Community_Account
Edit Clone Del	Contact Record Page	Contact_Record_Page
Edit Clone Del	Demo App	Demo_App
Edit Clone Del	Email Application Pane Default	Email_Application_Pane_Default
Edit Clone Del	Home Page Default	Home_Page_Default
Edit Clone Del	Lead Record Page	Lead_Record_Page
Clone View	Opportunity Record Page	Opportunity_Record_Page
Edit Clone Del	Opportunity Record Page	Opportunity_Record_Page
Edit Clone Del	Process Payment Record Page	Process_Payment_Record_Page

Click on New and create an App Page:



Search for the component called “Add Grid View” from the left list and add it to the page. Select the options you want to see in your page from the right hand side.

Once activated the page assign the appropriate profiles and record types. Save it.

Activation: Account View

PAGE SETTINGS LIGHTNING EXPERIENCE MOBILE NAVIGATION

Give this app page a name, set the page visibility, and choose an icon.

App Name
Enter a name for your app.
Account View

Icon
Choose an icon to represent your app in Lightning Experience and the mobile app.
 [Change...](#)

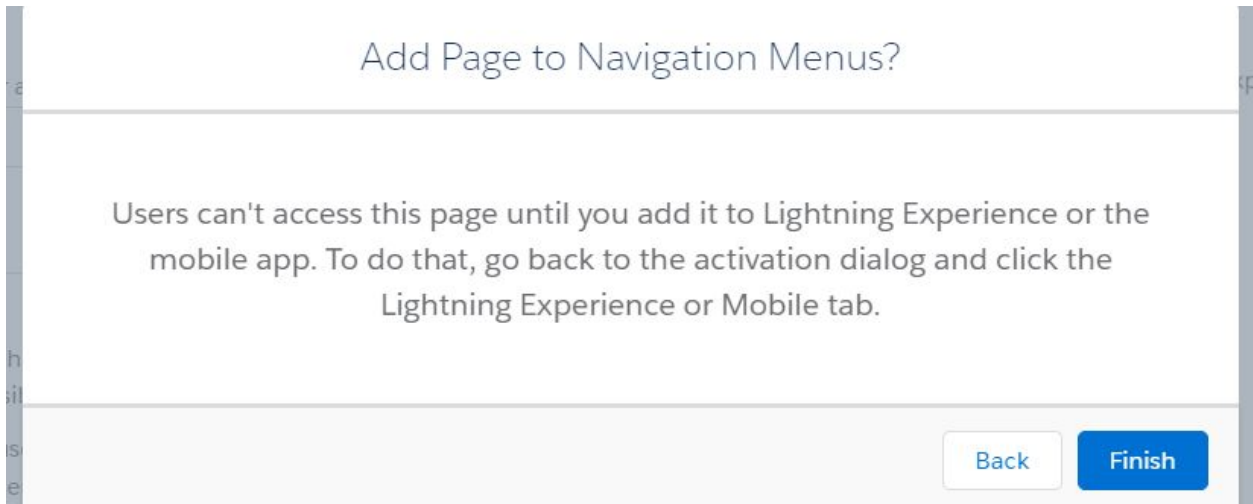
Page Activation
When you activate this page, a custom tab is created for it. You can manage the tab's visibility in Setup.

☒ Activate for all users
☐ Activate for System Administrators only

To set further restrictions on who sees this page, use permission sets and profile assignments in Setup.

[Cancel](#) [Save](#)

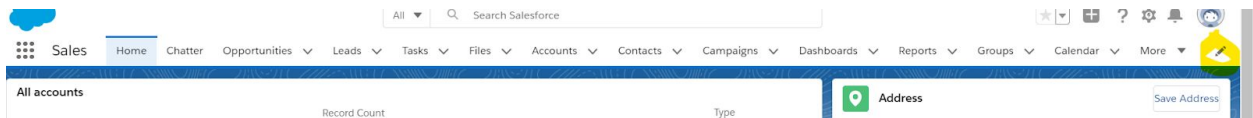
Click finish if you get the popup as below:



Assigning the page to your App

Once the page is saved/created we need to assign it to the app so that users can access it.

Go to your app and click the pencil icon to edit the navigation bar. (Check with your admin if you don't see this icon or contact us from our support channel for help)



Click "Add More Items".

Edit Sales App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.
[Learn More](#)

NAVIGATION ITEMS (33)

Add More Items

Home

Chatter

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Reset Navigation to Default

Cancel

Save

Add Items

Available Items

Favorites

All1

Search all items...

Account View X

1 item selected

Account View

Admin Tools

Advanced

All Templates

Amendments

App Launcher

Approval Requests

Assets

Authorization Form

Authorization Form Consent

Cancel

Add 1 Nav Item

Edit Sales App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.
[Learn More](#)

1 item added to your list. Save your updates.

NAVIGATION ITEMS (34) [Add More Items](#)

- Purchase Orders
- Jobs
- Applicants
- Process Payments
- Notes
-
-
-
- Account View

[Reset Navigation to Default](#)

[Cancel](#) [Save](#)

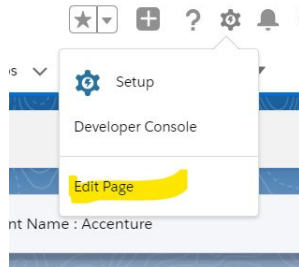
Now you can access the page form the navigation menu

Sales Home Chatter Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Groups **Account View** More

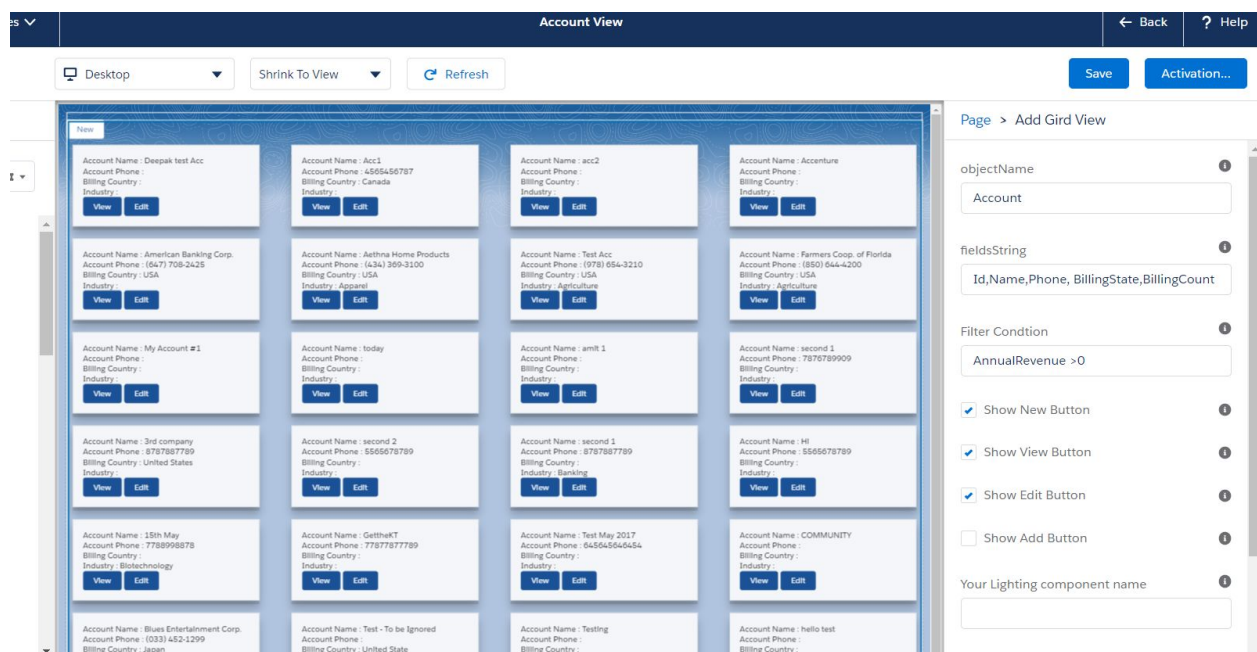
Account View

Account Name : Deepak test Acc	Account Name : Acc1	Account Name : acc2	Account Name : Accenture
Account Name : American Banking Corp.	Account Name : Aethna Home Products	Account Name : Test Acc	Account Name : Farmers Coop. of Florida
Account Name : My Account #1	Account Name : today	Account Name : amit 1	Account Name : second 1
Account Name : 3rd company	Account Name : second 2	Account Name : second 1	Account Name : Hi
Account Name : 15th May	Account Name : GettheKT	Account Name : Test May 2017	Account Name : COMMUNITY
Account Name : Blues Entertainment Corp.	Account Name : Test - To be Ignored	Account Name : Testing	Account Name : hello test

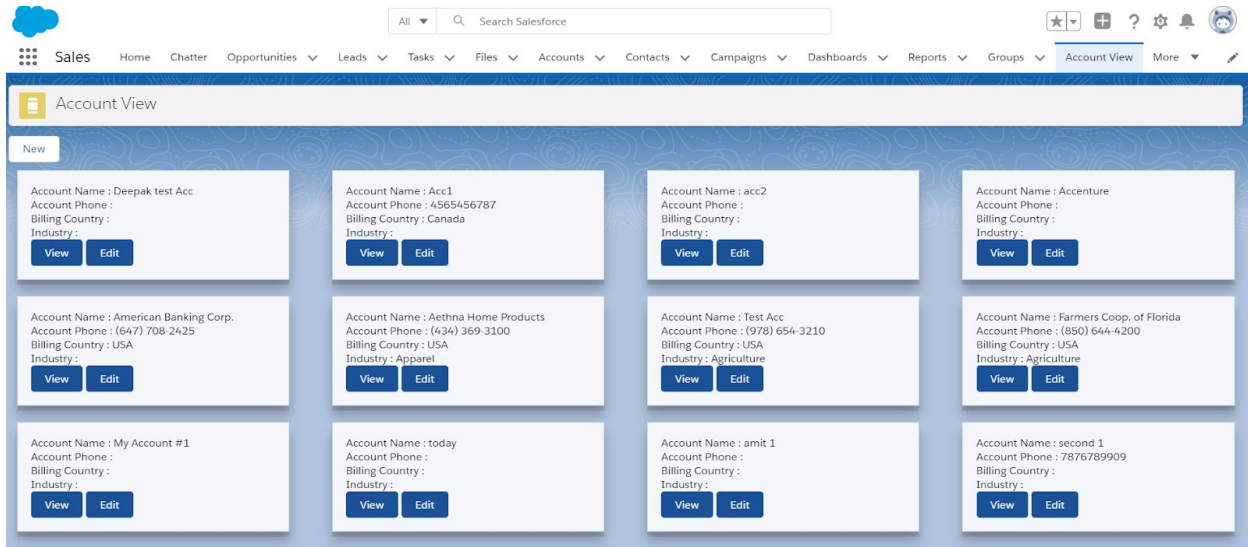
Edit the page to change the options



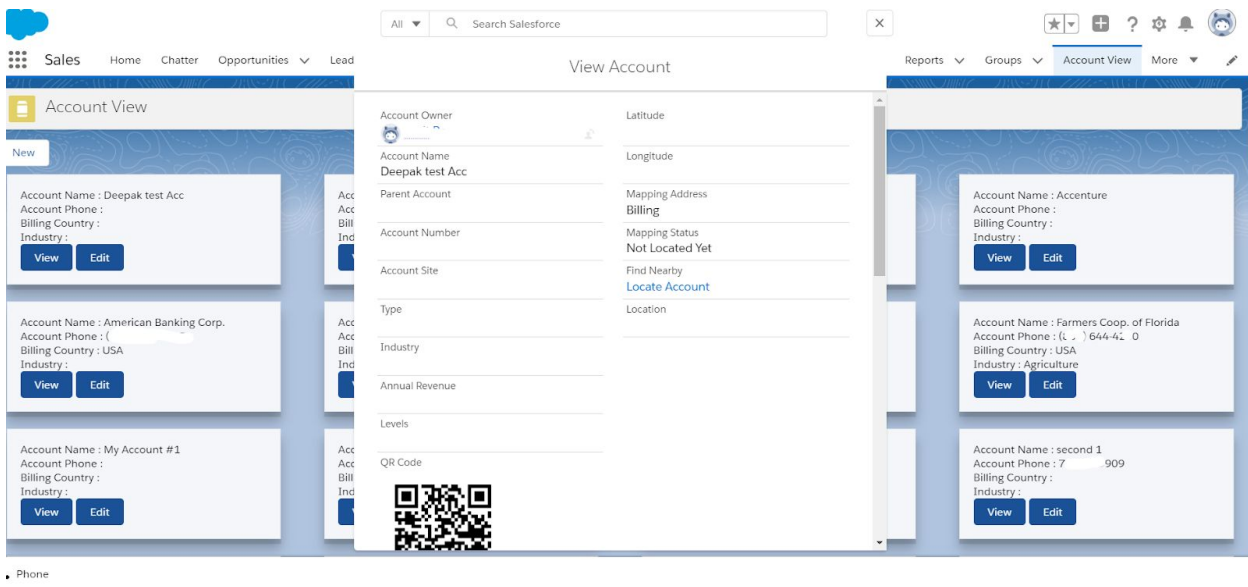
Add the fields you want to see in there and the buttons you would like to see.



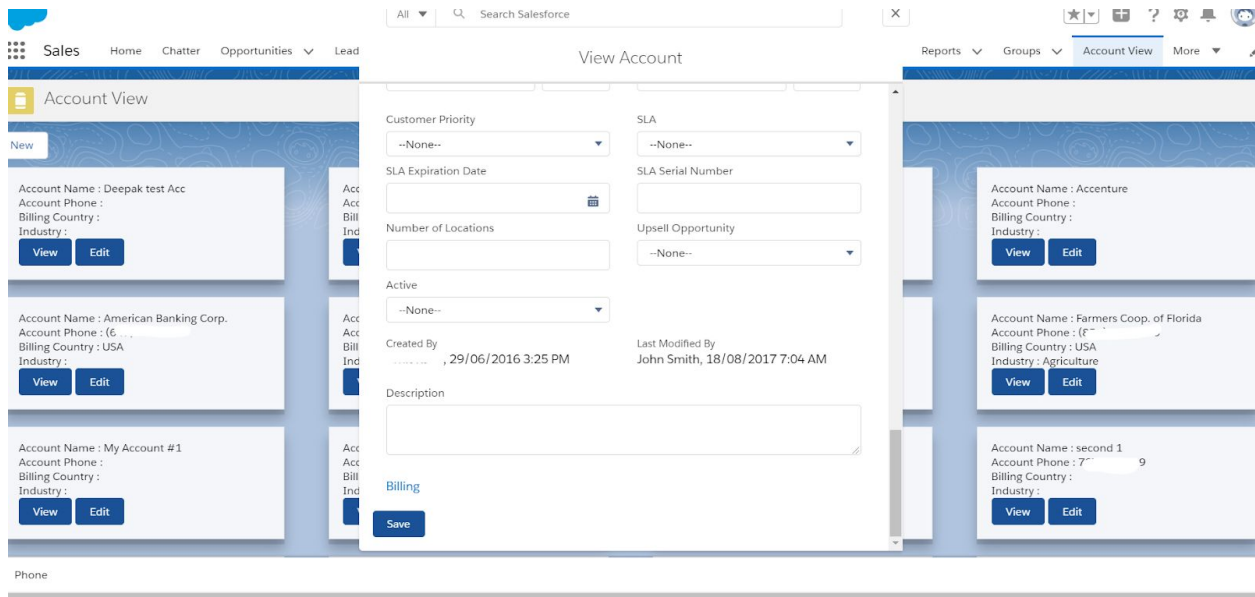
Once saved your page should look like below:



Click view to view an account record. The fields are derived from your page layout:

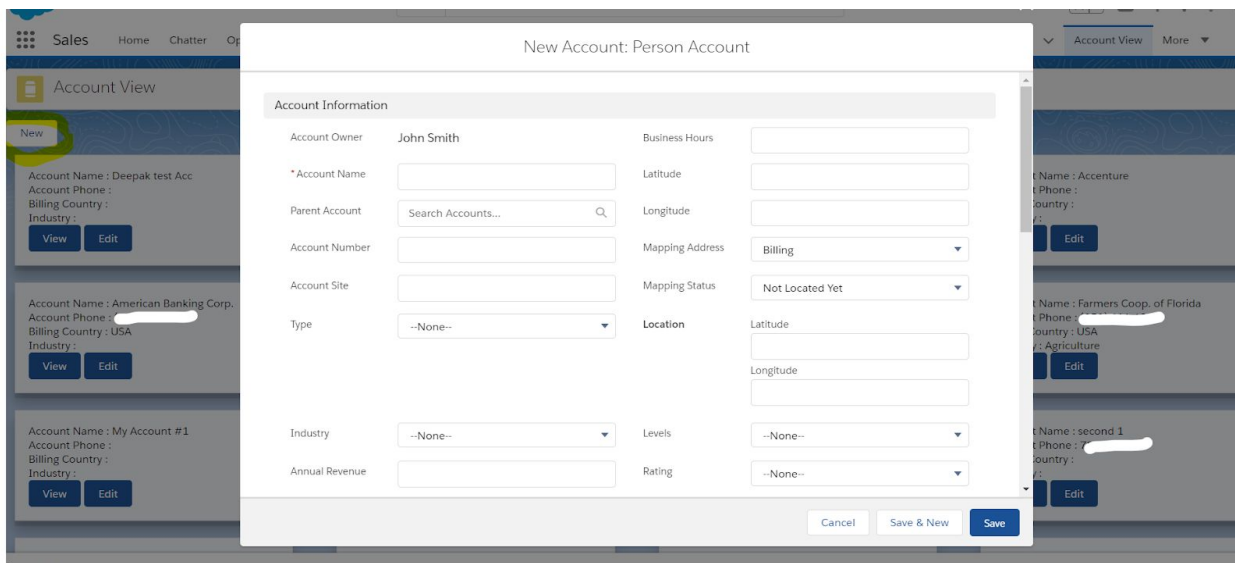


Click Edit to make changes to the record and Save the record using the save button within the small record view window.



Adding new records to the object

You can create a new record by simply clicking on the “New” button on the left hand side and you will be presented the form based on your object settings. The record type selected is the default record type for the profile.



Configuration Options

- ❖ In the 1st Box (i.e. objectName) give the API name of the object you want the grid to pull the data from
- ❖ In 2nd Box (i.e. fieldsString) put the comma (",") name of the fields you want to show in each tiles
Note: - MAKE SURE YOU INCLUDE "Id" as one of the fields
- ❖ In 3rd Box You can write a filter condition (it won't take dynamic filters in this version of grid) Example : where Industry = 'Chemicals'
- ❖ Check the "Show New Button" if you like to show the New button which allow to create record
- ❖ Check the "Show View Button" if you like to show the View button which allow to view the record details
- ❖ Check the "Show Edit Button" if you like to show the Edit button which allow to edit the record
- ❖ If Check "Show Add Button" Grid will put a "Add" button on each tile which act as "Add to cart"
- ❖ If you like to receive the selected components in you lighting component, fill the Name of your lighting component in text box which is label as "Your Lighting Component Name" for example if i like to receive the id of selected components in my component (let say i named it "myComponent") then i will put the lighting component nause as, "c:myComponent" do include c: as suffix or your namespace, **also implement list type attribute name as 'ListOfSelectedId' in your lighting component** to get the selected Id from this list use **ListOfSelectedId[i].name**

Known issue

1. Filter condition is not working. Will be fixed in the next release.

Support or Ideas

We are open to receive ideas how to improve it. Please share your ideas and suggestions to info@appsinvent.com and we will be glad to add the features in future releases.

For any support on this as well, you can send an email to info@appsinvent.com with the description and our team will be assisting you