

Data Creator: Setup Guide

Introduction

This guide aims to help you setup a Data Creator instance from Start to End.

Quick recap: An instance can be defined as a group of related/unrelated DM Objects (Which are really SOBJets) that are related in some form or would ideally need to be looked at when something breaks.

As an example, we will now create a flow for a user to create Account - Contact Data.

The screenshot shows the Salesforce 'Account-Contact Wizard' interface. At the top, there's a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below this, a breadcrumb trail shows 'Sales' > 'Home' > 'B2B Commerce Training Assistant' > 'DineshTest' > 'Opportunities' > 'Leads' > 'Tasks' > 'Files' > 'Accounts' > 'Contacts' > 'Account-Contact Wizard'. The main header of the wizard is 'Account-Contact Wizard'. Below the header, it says 'Instance Name: Account-Contact Flow' with buttons for 'Save Draft', 'Reset', and 'Submit'. A progress bar shows two steps: 'Account' (active, highlighted in blue) and 'Contact'. The 'Account' step is expanded, showing a form with two input fields: 'Account Name' and 'Account Phone'. At the bottom of the form are 'Back' and 'Next' buttons.

Metadata Setup

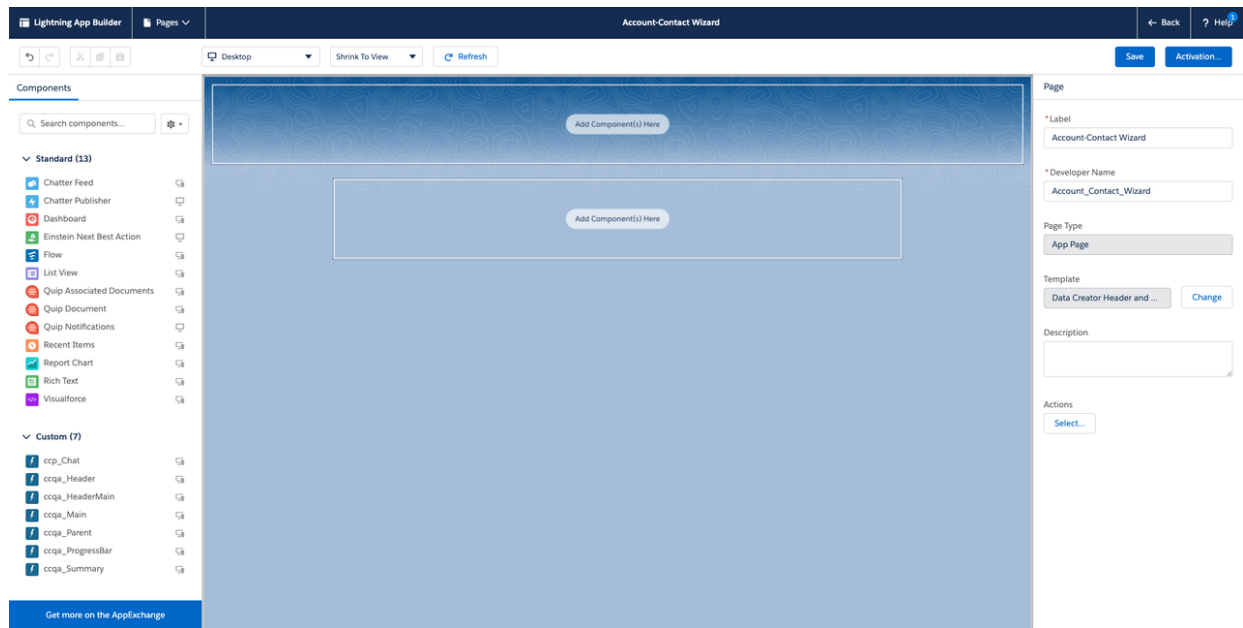
1. The first step of setting up an instance is making sure that you have setup all DM Objects as required. **If you already have these setup, skip to Step 3.** In this example, we are going to setup an instance to create a flow that creates Accounts and Contacts. To Create a DM Object:
 - a. Go to **Setup > Custom Metadata Types > DM Object > Manage Records > New**
 - b. Create a **DM Object** for the **Account** Object by setting the following fields
 - i. **MasterLabel:** Account
 - ii. **DM Object Name:** Account
 - iii. **API Name:** Account
 - c. Create a **DM Object** for the **Contact** Object by setting the following fields
 - i. **MasterLabel:** Contact
 - ii. **DM Object Name:** Contact
 - iii. **API Name:** Contact
2. Once we have **DM Object** records setup, we need to create **DM Field** (**Setup > Custom Metadata Types > DM Field > Manage Records > New**) records for all the fields we want the user to create data for:

- a. Create a **DM Field** for the **Account** Object by setting the following fields
 - i. **MasterLabel:** Account Name
 - ii. **DM Field Name:** Account_Name
 - iii. **Object Name:** Account (From Step 1)
 - iv. **API Name:** Name
 - v. **Sequence:** 1
 - vi. **Enabled:** Checked
 - vii. **Field Type:** Text
- b. Create a **DM Field** for the **Account** Object by setting the following fields
 - i. **MasterLabel:** Account Phone
 - ii. **DM Field Name:** Account_Phone
 - iii. **Object Name:** Account (From Step 1)
 - iv. **API Name:** Phone.
 - v. **Sequence:** 2
 - vi. **Enabled:** Checked
 - vii. **Field Type:** Number
- c. Create a **DM Field** for the **Contact** Object by setting the following fields
 - i. **MasterLabel:** Contact Last Name
 - ii. **DM Field Name:** Contact_Last_Name
 - iii. **Object Name:** Contact (From Step 1)
 - iv. **API Name:** LastName
 - v. **Sequence:** 1
 - vi. **Enabled:** Checked
 - vii. **Field Type:** Text
- d. Create a **DM Field** for the **Contact** Object by setting the following fields
 - i. **MasterLabel:** Contact First Name
 - ii. **DM Field Name:** Contact_First_Name
 - iii. **Object Name:** Contact (From Step 1)
 - iv. **API Name:** FirstName
 - v. **Sequence:** 2
 - vi. **Enabled:** Checked
 - vii. **Field Type:** Text
- e. Create a **DM Field** for the **Contact** Object by setting the following fields
 - i. **MasterLabel:** Contact Account
 - ii. **DM Field Name:** Contact_Account
 - iii. **Object Name:** Contact (From Step 1)
 - iv. **API Name:** AccountId
 - v. **Enabled:** Checked
 - vi. **Field Type:** Reference
 - vii. **Populate From Session:** Checked

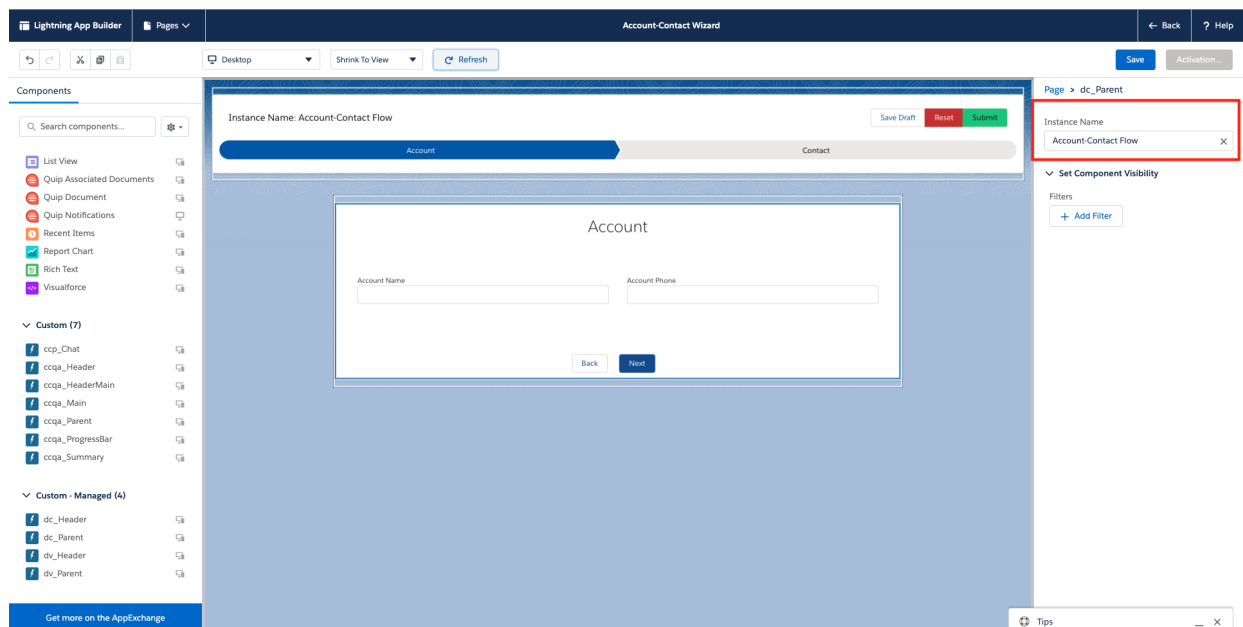
3. The next step is to setup an instance of the **Data Creator Instance** (**Setup > Custom Metadata Types > Data Creator Instance > Manage Records > New**). To do this create a new record by setting the following fields
 - a. **MasterLabel**: Account-Contact Flow
 - b. **Data Creator Instance Name**: Account_Contact_Flow
4. Once we have our DM Object, DM Field and Data Creator Instance records, the last step is to associate DM Object records to the Data Creator Instance record that we created in Step 3. To do this, we create Data Creator Instance-Object records (**Setup > Custom Metadata Types > Data Creator Instance-Object > Manage Records > New**).
 - a. Add the Account object:
 - i. **MasterLabel**: Account-Contact-Flow_Account
 - ii. **Data Creator Instance-Object Name**: Account_Contact_Flow_Account
 - iii. **Instance Name**:Account Contact Flow (From Step 3)
 - iv. **Object Name**: Account (From Step 1)
 - v. **Sequence**: 1
 - b. Add the Contact object.
 - i. **MasterLabel**: Account-Contact-Flow_Contact
 - ii. **Data Creator Instance-Object Name**: Account_Contact_Flow_Contact
 - iii. **Instance Name**:Account Contact Flow (From Step 3)
 - iv. **Object Name**: Contact (From Step 1)
 - v. **Sequence**: 2

Lightning Page to host instance

1. To host a Data Creator Instance, we need a lightning page. You can use an existing page or create a new one. To create a new one, navigate to **Setup > Lightning App Builder > New**
2. In the new page wizard, set the following fields:
 - a. **Page Type**: App Page
 - b. **Label**: Account-Contact Wizard
 - c. **Template**: Data Creator Header and Main Content Region



- Once your page is created, drag and drop the **dc_Header** into the top region and **dc_Parent** into the bottom region.
- After dragging the **dc_Parent** into the region, select the Account-Contact Flow under the **Instance Name** pick-list from the ride side bar.



- Hit **Save**.
- Hit **Activate** and select a lightning app to add the new page to under the Lightning Experience and hit Save.
- If all goes well, you should be able to find the **Account-Contact Wizard** page in the App Launcher.