

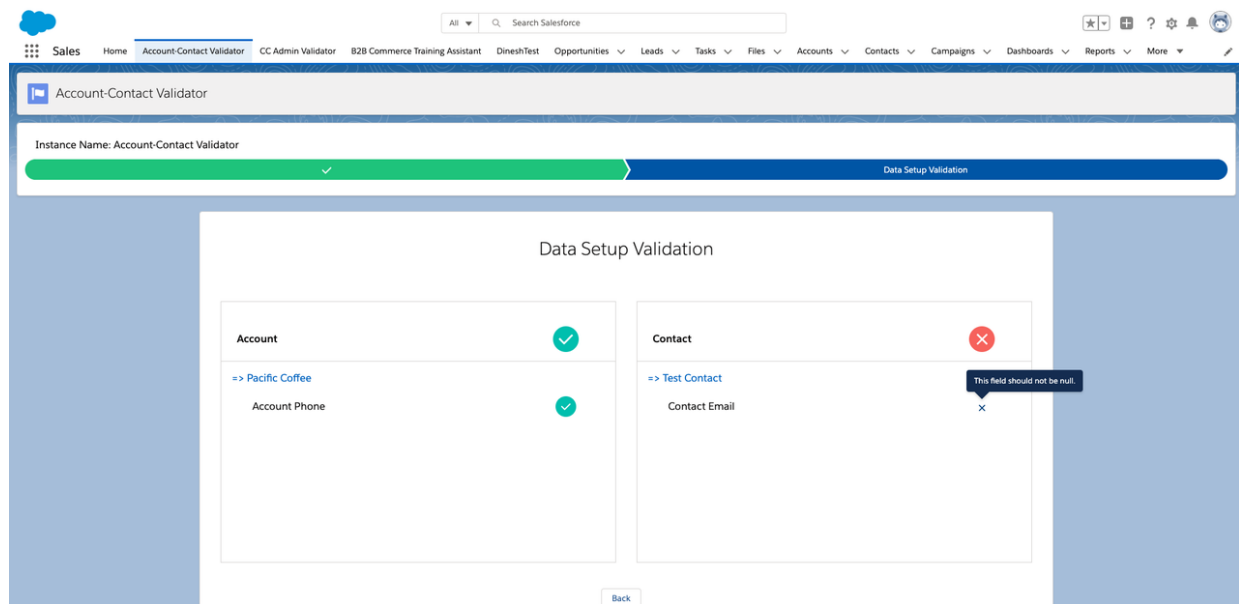
Data Validator: Setup Guide

Introduction

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

Quick recap: An instance can be defined as a group of related/unrelated DM Objects (Which are really SOjects) that a user can create data for on a single screen. Data Creator instances are setup by creating custom metadata records for the Data Creator Instance object and subsequently creating Data Creator Instance-Object records to single/multiple DM Objects that you wish to include in this instance.

As an example, we will now create a validator to validate Account - Contact Data.



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:

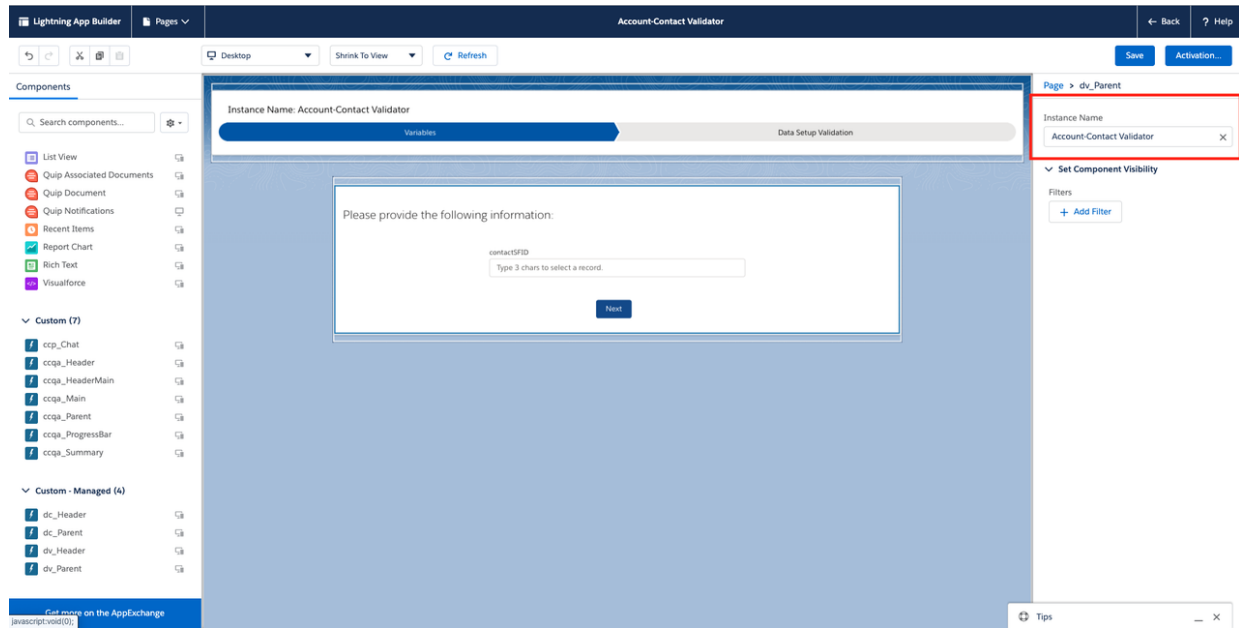
- a. Create a **DM Field** for the **Account** Object by setting the following fields
 - i. **MasterLabel:** Account Name
 - ii. **DM Field Name:** Account_Name
 - iii. **Object Name:** Account (From Step 1)
 - iv. **API Name:** Name
 - v. **Sequence:** 1
 - vi. **Enabled:** Checked
 - vii. **Field Type:** 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 Email
 - ii. **DM Field Name:** Contact_Email
 - iii. **Object Name:** Contact (From Step 1)
 - iv. **API Name:** Email
 - v. **Enabled:** Checked
 - vi. **Field Type:** Text
 - vii. **Sequence:** 3
- f. 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. To validate specific fields, we need to associate rules to these. We do these by creating DM Rule records. In this example we are going to ensure that certain fields on the Account and Contact records are not null. Create the following DM Rule Record:
 - a. **MasterLabel:** Not NULL
 - b. **DM Rule Name:** Not_NULL
 - c. **Rule Operator:** NOT NULL
 - d. **Error Message:** This field should not be null.
 - e. **Enabled:** Checked
- 4. Now that we have a DM Rule, let's associate them to certain DM Fields by creating DM Field-Rule records. In this example, we'll validate that the Account Phone and Contact email fields are not null. To do this, create the following DM Field=Rule records:
 - a. Create a **DM Field-Rule** for the **Account Phone** field by setting the following fields
 - i. **MasterLabel:** Account Phone NOT NULL
 - ii. **DM Field-Rule Name:** Account_Phone_NOT_NULL
 - iii. **Field Name:** Account Phone
 - iv. **Rule Name:** Not NULL
 - b. Create a **DM Field-Rule** for the **Contact Email** field by setting the following fields
 - i. **MasterLabel:** Contact Email NOT NULL
 - ii. **DM Field-Rule Name:** Contact_Email_NOT_NULL
 - iii. **Field Name:** Contact Email
 - iv. **Rule Name:** Not NULL
- 5. The next step is to setup an instance of the **Data Validator 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 Validator
 - b. **Data Creator Instance Name:** Account_Contact_Validator
- 6. Next we need variables to filter our data to only check records that the user cares about. In this particular case, we are going to collect a Contact record from the user. To do this, we create Data Validator Variable record (**Setup > Custom Metadata Types > Data Validator Variable > Manage Records > New**).
 - a. **MasterLabel:** The contact to be validated
 - b. **Data Validator Variable Name:** contactSFID
 - c. **Field Type:** Reference
 - d. **Instance Name:**Account Contact Validator (From Step 3)
 - e. **Lookup To Object Name:** Contact
 - f. **Required:** Checked

7. Once we have our DM Object, DM Field and Data Validator 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 Validator Instance-Object > Manage Records > New**).
 - a. Add the Account object:
 - i. **MasterLabel:** Account-Contact-Validator_Account
 - ii. **Data Creator Instance-Object Name:** Account_Contact_Validator_Account
 - iii. **Instance Name:**Account Contact Validator (From Step 3)
 - iv. **Object Name:** Account (From Step 1)
 - v. **WHERE Clause:** Id IN (SELECT AccountId FROM Contact WHERE Id = :{{contactSFID}})
 - b. Add the Contact object.
 - i. **MasterLabel:** Account-Contact-Flow_Contact
 - ii. **Data Creator Instance-Object Name:** Account_Contact_Validator_Contact
 - iii. **Instance Name:**Account Contact Validator (From Step 3)
 - iv. **Object Name:** Contact (From Step 1)
 - v. **WHERE Clause:** Id = {{contactSFID}}

Lightning Page to host instance

1. To host a Data Validator 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 Validator
 - c. **Template:** Data Validator Header and Main Content Region
3. Once your page is created, drag and drop the **dv_Header** into the top region and **dv_Parent** into the bottom region.
4. After dragging the **dv_Parent** into the region, select the Account-Contact Validator under the **Instance Name** pick-list from the ride side bar.



5. Hit **Save**.

6. Hit **Activate** and select a lightning app to add the new page to under the Lightning Experience and hit Save.