

Dynamic Related List

USAGE GUIDE



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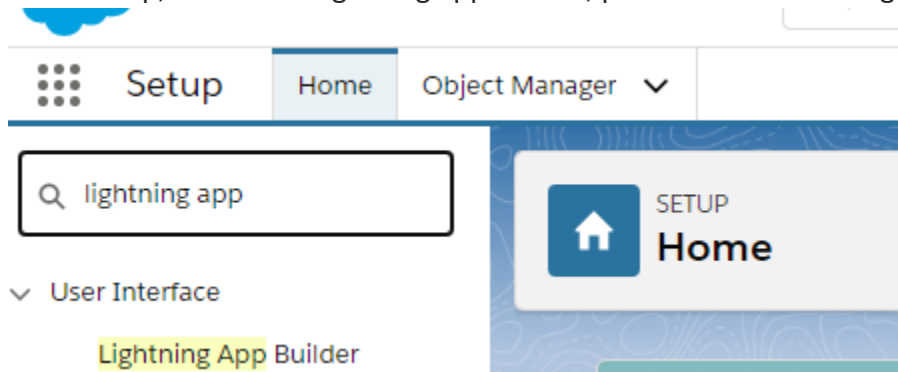
Usage Guide

Pre-Requisites

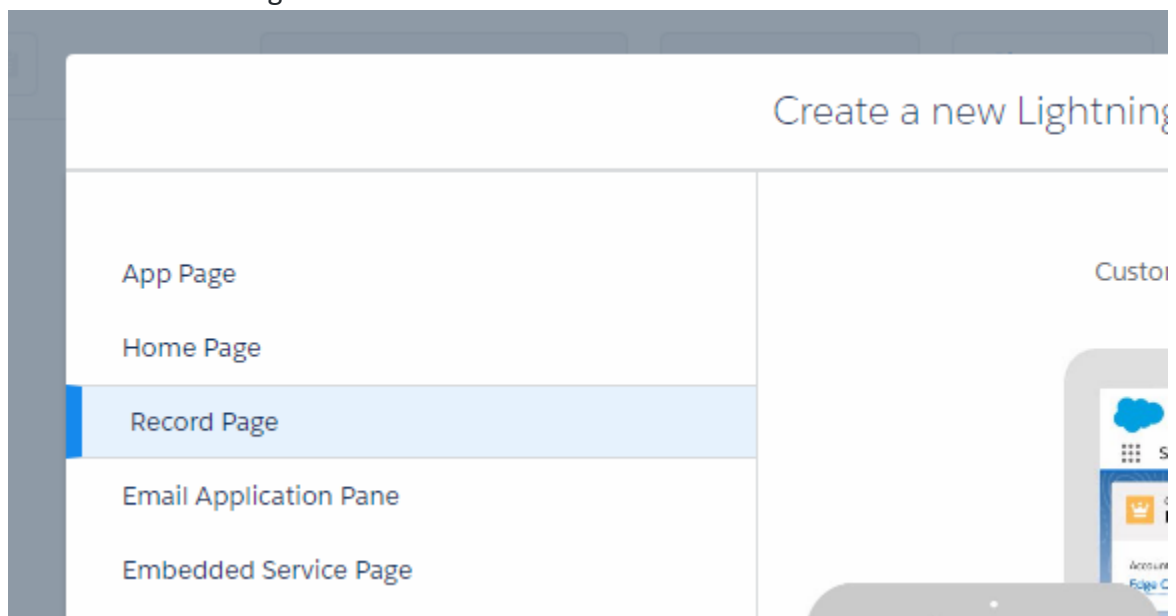
1. Create a fieldset on desired object
2. Add required fields in fieldset

Adding Component to a New Lightning App

- Switch to Lightning Experience if User is in classic.
- From Setup, search for Lightning app builder, please see below image: -



- Click on **Lightning App Builder**, a popup will appear. Please select option **Record Page** as shown in below image:



- Click **Next** button, a new popup screen will appear, and you will be asked to fill:
 - **Label**: This will be label of lightning page created for e.g. Account Page
 - **Object**: Search and select desired Object from lookup. If User want to add our component to Account record, then select Account.
- Click **Next** button
- Select Appropriate layout for the Page or User can clone the default layout, click **Finish** button. (You should now be in new Record Page just created within App Builder)
- Now, search for **dynamicRelatedList** within right hand side component list and drag this component to desired place within the Page
- Now click on our Component then you will see some attributes in right side of the Page in App builder (please refer below image). Please refer below [Set Component Attributes](#) section for filling them with appropriate values.
- Click **Save** button to save page
- Click **Activate** button to activate page as needed

Adding Component to Existing Lightning App

Component can be used with any standard or custom object using Lightning App Builder.

- Create a fieldset on related object for which records are to be displayed
- Simply open a record page for primary object in lightning app builder, add the component and set the component attributes

Set Component Attributes

Example Configurations

- Create a fieldset on Contact with api name **ActiveContacts**
- Open Account's page within Lightning app builder
- Set following attributes on component
 - Title = Contacts
 - Header Icon = standard:contact (for more icons refer <https://www.lightningdesignsystem.com/icons/>)
 - Object = Contact
 - Fieldset Name = ActiveContacts
 - Filters = accountid='[id]' and Status__c = 'ACTIVE'

Attributes

Name	Mandatory	Type	Usage	Example
------	-----------	------	-------	---------

Title	Yes	String	Display title of the related list	Contacts
Header Icon	No	String	Icon	standard:contact
Footer	No	String	Display text in footer	List of active contacts
Object Name	Yes	String	API name of object for which records are to be displayed	Contact
Fieldset Name	Yes	String	API Name of Object's fieldset to display columns in related list	Org_Contacts
Action Field Name	No	String	API Name of field to be displayed as link to the record view	Name
Filters	Yes	String	Filters in SOQL format to filter records <i>Note: The any field of current record can be used as merge field for criteria (as shown ID field being merged)</i>	accountid='[id]' OR account.ParentId='[id]'
Sort by	No	String	API Name of field to sort records	Email
Sort Descending	No	Boolean	Set checked, if data to be sorted in descending order. Default value is false	
Maximum number of records to display	No	Integer	Maximum number of records to display (Default value is 5)	10

Sample Use Cases

Situation: Your org has 2 level account structure (Organization, Office Location) and you want users to see all opportunities linked to the current account and its organization or office locations.

Solution: Use DynamicRelatedList component to display records of Opportunity and set Filter condition as

```
accountId = '[id]' or accountId = '[parentid]' or account.parentid = '[id]' or
account.parentid = '[parentid]'
```

Situation: Your org has a custom object **Transaction** (API Name: Transaction__c) which has a text field storing ID of multiple objects (like a polymorphic key). Field's api name is ParentId. You can users to see all transactions related to the account they are viewing

Solution: Use DynamicRelatedList component to display records of **Transaction__c** object (Important: Provide api name) and set Filter condition as

parentId = '[id]'

Situation: Your users want to see only open opportunities as related list within an account view

Solution: Use DynamicRelatedList component to display records of **Opportunity** object and set Filter condition as

accountId = '[id]' and isclosed = false

The screenshot shows the Salesforce interface for the 'Dickenson plc' account. The 'Related' tab is active, displaying two main sections: 'Hierarchy Contacts (2)' and 'Hierarchy Opportunities (5)'. The 'Hierarchy Contacts' table lists Jack Rogers and Andy Young with their contact details. The 'Hierarchy Opportunities' table lists five opportunities with columns for Name, Opportunity Type, Stage, Amount, and Close Date. The 'Activity' tab on the right shows a 'New Task' button and a list of upcoming and overdue activities.

Full Name	Email	Business Phone	Mobile Phone	Do Not Call	Email Valid?	Annual Salary
Jack Rogers	jrogers@burlington.com	(330) 222-7000			✓	
Andy Young	a_young@dickenson.com	(785) 241-6200	(785) 265-5350	✓	✗	\$1,234,567.77

Name	Opportunity Type	Stage	Amount	Close Date
Burlington Textiles Weaving Plant Gene...	New Customer	Closed Won	\$235,000.00	Jun 7, 2017
Dickenson Mobile Generators	New Customer	Qualification	\$15,000.00	Jun 7, 2017
Edge Emergency Generator	New Customer	Closed Won	\$75,000.00	Jun 7, 2017
Edge Emergency Generator	Existing Customer - Replacement	Id. Decision Makers	\$35,000.00	Jun 7, 2017
Edge Installation	Existing Customer - Upgrade	Closed Won	\$50,000.00	Jun 7, 2017

Advanced Usage

- Multi-Language Support:** We have 2 messages that are displayed on Component when “No Data exists to display” or “Entered fieldset name is not correct or doesn’t exists”.

Below are the labels that we have created: -

- No Data Found
- No Fieldset Found

For Editing these test messages, go to Setup> Custom Labels. Edit any of the above-mentioned label and update “Value” field to desired text.

2. **Display Parent Record Field:** For displaying Parent record field in Component, follow below steps:
 - a. Create new formula field in Child Object
 - b. Add new field to fieldset that will be used

Considerations

- As lightning-datatable is currently not supported in mobile view, this component will also have similar behavior
- Queries should be optimized to ensure better performance for data retrieval