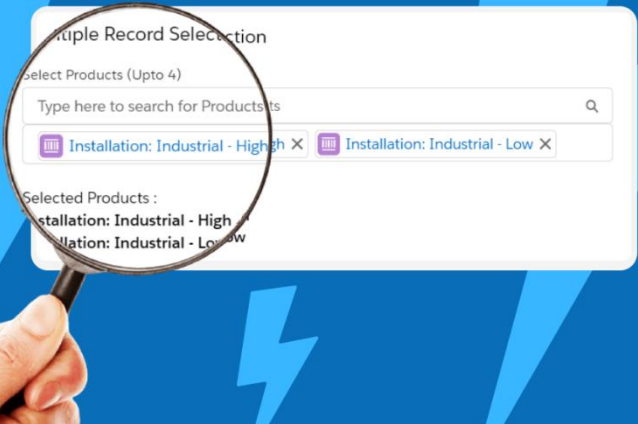




Multiple Record Selection

Select Products (Upto 4)

Type here to search for Products

Installation: Industrial - High X Installation: Industrial - Low X

Selected Products :

Installation: Industrial - High

Installation: Industrial - Low

TRANZEVO

ADVANCED MULTISELECT LOOKUP

LIGHTNING COMPONENT



Features



Contents

1. Introduction	3
2. Features	4
1. Custom Metadata Driven	4
2. Single Record Selection	4
3. Multiple Record Selection	5
4. Supports Standard and Custom Objects	5
5. Advanced Filtering Options	6
6. Get all records meeting the search criteria	6
7. Search on Multiple Text Fields	7
8. Dependent Lookup Component	7
9. Accessibility Checks	7



1. Introduction

Salesforce comes up with many out of box UI components and Lightning Base components.

We have created a lightning component which is an advanced version of the lookup component. It has all the basic features of any lightning lookup plus it allows selection of multiple records. Multiple record selection will give us more flexibility when we need to create junction object records from a custom component. Some of the examples include adding invitees to event, link multiple contacts to an Account, etc.

The component is metadata driven. So, no more code changes are required when we need to update the lookup configurations like updating the search criteria, updating fields to be displayed on UI, etc. The package also involves a dependent lookup component which will help to configure the results of one lookup to be based on results of another lookup (Parent – Child Relationship).

This component supports standard as well as custom objects. It is also supported in Salesforce1.



2. Features

This lightning lookup component has following features,

1. Custom Metadata Driven

The Lookup field configuration details are defined as a custom metadata record in Salesforce.

This Custom Metadata Record Name is used in parent lightning component to fetch the configuration details and use it.

Below is the example of sample lookup setting for Account Object. For more details on Metadata fields refer Advanced Multiselect Lookup Tool – Dev and Admin

Custom Lookup Setting Detail Edit Delete Clone

Label	AccountLookup	Protected Component	☐
Custom Lookup Setting Name	AccountLookup	Namespace Prefix	
Maximum No of Records Allowed to Select	1		
Object Name	Account		
Field Text	Name		
Placeholder	Type here to Search for Accounts		
Additional Field	Website		
Field Value	Id		
Maximum No of Records to be Displayed	5		
Record Type			
Search Field	Name		
Lookup Icon	standard:account		
Condition String			
Label	Account		
Relationship Field Name (Parent)			

2. Single Record Selection

This component allows Single Record Selection for the Lookup Field. And returns the fields values as per the configuration.

Account

 University of Arizona ×

Opportunity

 University of AZ Installations ×



3. Multiple Record Selection

The number of records to be selected can be configured. The Lookup field is automatically disabled when maximum record selection count is reached.

Multiple record selection will give us more flexibility when we need to create junction object records from a custom component. Some of the examples include adding invitees to event, link multiple contacts to an Account or linking a contact to multiple Accounts. This component returns list of all the selected records to the parent component where this component is added.

Select Products

4. Supports Standard and Custom Objects

The lookup component can be used for standard objects as well as custom objects assuming that the user has permission on the required object.

Add Team Members



5. Advanced Filtering Options

Like the standard lookup filter option, Advanced Multiselect Lookup Tool also allows to add filter to the lookup search results.

The filter criteria can be defined using record types and condition string in the Custom Metadata Record.

To apply filter based on the record types set the Record Type field on Custom Metadata. For. Ex if user wants to filter the accounts having record type as “Individual” or “Business” put value as (*'Business', 'Individual'*).

To specify any other conditions for WHERE clause in SOQL query use the Condition String field on Custom Metadata record.

Here are some examples of Condition String:

Sr No.	Criteria	Condition String
1	Filter Active account with Ratings Hot. Here Active__c is custom field on Account Object	Active__c = 'Yes' AND Rating = 'Hot'
2	Filter Active Products on a Product Lookup	IsActive = true
3	Filter contact records with either of Email or Phone populated.	Email!=Null OR Phone!=Null

6. Get all records meeting the search criteria

With this feature, user will be able to get all the records which meet the search criteria.

Just click the Lookup Icon in the right side of the lookup field and a modal will be displayed which will allow user to find and select the required record.



Type here to search for Contacts

CONTACT RESULTS

☐	FULL NAME	EMAIL
☐	Rose Gonzalez	rose@edge.com
☐	Sean Forbes	sean@edge.com
☐	Jack Rogers	jrogers@burlington.com
☐	Pat Stumuller	pat@pyramid.net
☐	Tim Barr	barr_tim@grandhotels.com
☐	Lauren Boyle	lboyle@uog.com
☐	Babara Levy	b.levy@expressl&t.net

Select

Click here to get a list of all associated records satisfying the search criteria.

7. Search on Multiple Text Fields

The component has ability to search across multiple fields. You can specify up to 5 search fields while configuring the lookup using metadata record.

If user wishes to have search option on Name and Website field on Account object then specify the search field as *Name,Website*.

8. Dependent Lookup Component

A dependent lookup is a relationship between a parent and child object with a lookup filter that references fields on the source object.

For example, you can configure the Contact lookup field to only show contacts associated with the account selected in the parent lookup.

Dependent Lookup

Account

Type here to search for an Account

Related Contacts

Type here to search for related Contacts

9. Accessibility Checks

On component initialization, the object and field level permissions are checked for the running user.

If the user does not have any of the permissions then, the lookup field is disabled and



error message is displayed as below. A message will be displayed as below:

Contact

ERROR : You don't have necessary permissions to access the object 🔍

The message in the component can be configured by changing value of custom label:
Lookup Alert Message.