

Custom Object Teams:

Implementation Guide and

User Manual

About the App:

The Custom Teams App is a Salesforce Native App built using the Force.com platform. It is a simple yet powerful tool to maintain access to Private Custom Objects with Team Members, for example, Project Teams, Proposal Teams etc.

Features:

- Provide access to single or multiple Custom Objects using Teams
- Provide access to single or multiple users with a single click using Team Members
- Add or delete Team Members directly from Custom Object Record
- Manage Teams and confidential data

1 Setup Instructions:

1.1 Link Custom Object to Teams Object:

1. Download the App using the link provided
2. Create a custom field on the Custom Object in your org with Master Detail relationship to the "Teams" object in the Package
3. If you already have data in your Custom Private Object, you might not be able to create the Master Detail field directly. In that case, please follow the below 2 steps,
 - a. Create a look up field on the Custom Private Object to the "Teams" Object of the Package
 - b. Create a default team record on the "Teams" object in the package and assign this Team to all the Custom Private Object records
 - c. Convert the look up field on the Custom Private Object to Master detail field
4. Assign Custom Teams App to the user profile which needs access
5. Assign Read, Write, Create, Delete access to the user profiles for the Package Objects "Team" and "Team Members"
6. Make all the fields visible to the profiles
7. Make Tabs "Default on"

1.2 Add Team Members Related list to your Custom Object in Lightning by following the below Steps:

1. Navigate to Setup | User Interface | Lightning App Builder
2. Click Edit on the Custom Object Lightning page or create one.
3. Add the Lightning component called Related List-Single.
4. Customize the component with the following values:
 - a. Parent Record: Teams
 - b. Change Related List: Team Members
5. Save and activate.

2 Functionalities

1. Any number of Team Members can be added to a Team.
2. The level of access of the Team Members to the Teams will govern the level of access of the Team Members to the related Custom Private Object.
3. The Level of access of the Team Member can be changed from “Read” to “Edit” and vice versa
4. Deleting a Team Member would delete the access of the Team Members to the Team and associated Custom Object records
5. Only a Team Owner can edit Team Members access or delete the Team
6. In order to remove access for all Team Members at once, click on “Inactivate” button on the Teams record
7. In order to delete the Team, Team Members and the associated custom Object records, click on “Delete” button on Teams Record.