

LDRD (Lightning Dynamic Relation Data) Installation Guide

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1. Installation

- 1.1. Install Latest App from [App Exchange](#)
- 1.2. LDRD App <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FYEGwUAP>
- 1.3. Get it Now
- 1.4. Login in with your SFDC PRD Credentials (This will just Validate Org, Not Install in it)
- 1.5. Where do you want to install this package? Will show Options to Install.
 - 1.5.1. Install In Production – This Option Will Install App in your Production Org with user credentials you entered.
 - 1.5.2. Install in Sandbox – This option will Install App in your Company Sand box which you can choose in next step.
 - 1.5.3. Install in Trail – This will be give a copy of trail Org which already setup with this App. (Note: This New Org will not have your company Org Setup). Fill Ready to start your trial? Form and get New Org to Test this App.
- 1.6. Note: Choose Install in Sandbox First and test the app before install in Production Org.
- 1.7. Install for All users
- 1.8. After Installation done assign Layout.
- 1.9. Setup-> Custom Metadata Type->myDynProSetup assign Page Layout 'myDynProSetup Layout 4.0' / Latest Layout to All Admin Profile(s).
- 1.10. Files->Upload Files
 - 1.10.1. Choose your Company Logo file, so it will show on all Pdf Pages.
 - 1.10.2. Save.
 - 1.10.3. Title of Logo file should be 'companylogo'. Edit Files and Set Title name to 'companylogo'.
 - 1.10.4. Give Viewer Access to All Users who Uses PDF option.
- 1.11. After Installation follow License Steps.
- 1.12. Note: If you need a Quote to get Approval before Checkout, send Email to Support with your Requirements.

2. AppExchange Checkout

- 2.1. Login to App Exchange with Production User.
- 2.2. Your User Name (Top right Corner) -> [My Installs & Subscriptions](#)
- 2.3. LDRD : Lightning Dynamic Relational Data (myDynPro Pack) -> Chose Option (Down at the End)
- 2.4. Click Buy Now
- 2.5. Enter Company Details Click Next
- 2.6. Choose Pricing Model as per your requirement. Enter Coupon Code (If any)
- 2.7. Enter Credit Card or Bank Details (Note : CC or Bank will not be Charged for 10 days of Free Trail then Charge 1st Payment and send Invoice)
- 2.8.

3. License Management

- 3.1. This step is required in Production Org and have a User License model. For Org Level Checkouts there is No License to Individual users required.
- 3.2. Setup->Installed Packages
- 3.3. Click Manage Licenses next to My DynPro pack (Only User based License model, skip this step for Org based license model) -> Add Users

4. User Permissions

- 4.1. The Following Authorizations required for each Profile that uses this app.
- 4.2. You can assign these authorizations in User profile(s) or Use myDynPro Pack permission set and assign permission set to Users.
 - 4.2.1.1. Setup->Permission Sets->my Dynpro Pack->Manage Assignments->Add Assignments
 - 4.2.1.2. Select Users and Assign
- 4.3. Enable Custom Metadata Type Access-> Add myDynPro Setup Metadata Permission (This Step is required from Spring 20 onwards)
- 4.4. Enable Apex Classes Access->Edit Add DynPro.myDynProGridController Class
- 4.5. If you Use Apex Plug-in add each Apex class to user Profile so user can see the data based on Plug-in results.

5. License model change

- 5.1. Login to App Exchange with Production User.
- 5.2. Your User Name (Top right Corner) -> [My Installs & Subscriptions](#)
- 5.3. LDRD : Lightning Dynamic Relational Data (myDynPro Pack) -> Chose Option (Down at the End)
- 5.4. Click Edit (or Buy Now)
- 5.5. Enter or Update Billing Details then Click Next
- 5.6. Choose Correct Number of User Licenses required
- 5.7. Choose Correct Plan 'Choose your payment plan' then Click Next
- 5.8. Enter your Credit Card Details and Click Next and Save

6. Cancel/Un-Install

- 6.1. Login to App Exchange with Production User.
- 6.2. Your User Name (Top right Corner) -> [My Installs & Subscriptions](#)
- 6.3. LDRD : Lightning Dynamic Relational Data (myDynPro Pack) -> Chose Option (Down at the End)
- 6.4. Click Uninstall
- 6.5. Login to your Org
- 6.6. Choose Radio button 'Do not save a copy of this package's data after uninstall'
- 6.7. Check 'Yes, I want to uninstall this package and permanently delete all associated components'
- 6.8. Click Uninstall button
- 6.9.