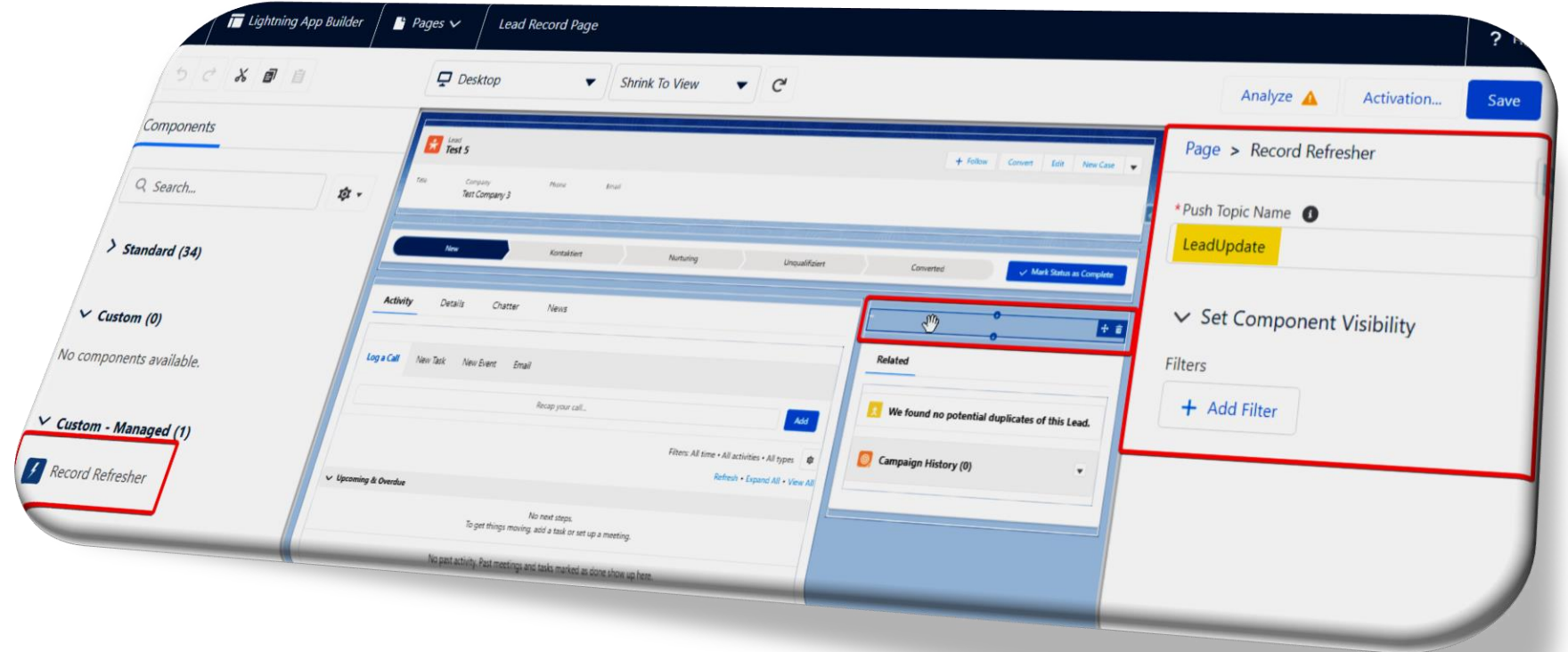


Record Page Refresher

Admin Guide

Content

Lightning component that can be include in a Lightning Record Page to refresh the page when a record change is detected based on Push Topic events.



Use Cases - Samples

Refresh the record page information when other user o API integration:

Update the record.

Two users working simultaneously.

Execute an async process that update a field value.

Create/delete/update
a related record.

CTI (API Integration) create a call record for an
account that the user is working on.

Implementing Steps

1. Install the package.
2. Identify the Object and Lightning Record Page to be refreshed.
3. Assign permission to RecordRefresher component to users who make use of the Lightning Record Page. (Profiles/Permission Sets)
4. Create a PushTopic on the Object, to notify updates, preferably on the possible fields that can be modified according to the use case.
5. Insert the component RecordRefresher in the Lightning Record Page. Set the PushTopic attribute with the same name that the PushTopic event created in step before.

Notes:

- For use cases on related records, some process must be implemented to update some field of the main record, so that the PushTopic can raise the event.
- Keep in mind [PushTopic Allocations](#).

Step 4 – Create PushTopic - Sample

Sample script to create a PushTopic on Lead. Execute in Immediate Window.

```
PushTopic pushTopic = new PushTopic();  
pushTopic.Name = 'LeadUpdate';  
pushTopic.Query = 'SELECT Id from Lead';  
pushTopic.ApiVersion = 50.0;  
pushTopic.NotifyForOperationCreate = false;  
pushTopic.NotifyForOperationUpdate = true;  
pushTopic.NotifyForOperationUndelete = false;  
pushTopic.NotifyForOperationDelete = false;  
pushTopic.NotifyForFields = 'ALL';  
insert pushTopic;
```

Step 5 – Insert Component - Sample

The screenshot displays the Lightning App Builder interface for editing a 'Lead Record Page'. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Lead Record Page'. The main workspace shows a preview of the lead record page layout, which includes a header with 'Lead Test 5', a table with columns 'Title', 'Company', 'Phone', and 'Email', and a section titled 'Activity' with tabs for 'Details', 'Chatter', and 'News'. A red box highlights the 'Record Refresher' component in the 'Custom - Managed (1)' section of the left-hand 'Components' panel. Another red box highlights the 'Record Refresher' component in the 'Related' section of the page preview, indicating its placement. A third red box highlights the 'Record Refresher' component in the right-hand 'Properties' panel, showing settings such as 'Push Topic Name' (LeadUpdate), 'Set Component Visibility', and 'Filters' (+ Add Filter). The 'Record Refresher' component is a lightning bolt icon.

Lightning App Builder Pages Lead Record Page ? Help

Desktop Shrink To View

Analyze Activation... Save

Components

Search...

Standard (34)

Custom (0)

No components available.

Custom - Managed (1)

Record Refresher

Lead Test 5

+ Follow Convert Edit New Case

Title Company Phone Email

Test Company 3

New Kontaktiert Nurturing Unqualifiziert Converted Mark Status as Complete

Activity Details Chatter News

Log a Call New Task New Event Email

Recap your call... Add

Filters: All time • All activities • All types Refresh Expand All View All

Upcoming & Overdue

No next steps. To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

Related

We found no potential duplicates of this Lead.

Campaign History (0)

Page > Record Refresher

* Push Topic Name LeadUpdate

Set Component Visibility

Filters + Add Filter

By:



Systemyc

Solutions that work