
SMART CUSTOMIZER LWC COMPONENT SETUP

Initial Setup Guide

v1.0 – DRAFT – Work in progress

Dated: 1st July 2020

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RELATEDLIST_LWC PACKAGE INSTALLATION

To make the RelatedList_LWC package ready to use, perform the instructions in the sections below

Prerequisites for Installation

The supported editions for RelatedList_LWC package are:

1. Enterprise Edition.
2. Unlimited Edition.
3. Developer Edition.
 - The Related LWC application is built to work only in the Salesforce Lightning Experience using Lightning Components and Web Components. For this, *My Domain* and *Lightning Experience* must be enabled in your Salesforce Org.
 - These actions may have 'change consequences' and they should be analyzed in advance. It is best to contact your Salesforce Admin and other Org Stakeholders to do an impact analysis before proceeding.

Installing Package

Follow below-mentioned steps to install the package on the org:

1. To install the RelatedList_LWC package, click [here](#).
2. The URL will redirect you to the Login screen.
3. Follow the following steps to access the Org
Login URL: **login.salesforce.com**
Username: **xxx@x.com**
Password: **xxxxxxxxxx**
4. After successful login into the org, you will be redirected to the installation screen.

Install Related List LWC v1.0
By R List LWC

☒ Install for Admins Only ☐ Install for All Users ☐ Install for Specific Profiles...

You're installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

☒ I acknowledge that I'm installing a Non-Salesforce Application that is not authorized for distribution as part of Salesforce's AppExchange Partner Program.

Install **Cancel**

App Name	Publisher	Version Name	Version Number
Related List LWC v1.0	R List LWC	Related List LWC	1.0

[Additional Details](#) [View Components](#)

Figure 2. Installation of the package

5. Select **Install for All Users** and check the box for **Acknowledgement**.
6. Click on the **Install** button.
7. **Note** – Install for all users will give RelatedList_LWC system access to all users.
8. Once the installation is finished, a success message will be shown. Click on **Done**.
9. You will be navigated to **Installed Packages** screen where the package "**RelatedList_LWC**" will be shown as installed.

CONFIGURING CUSTOM RELATED LIST COMPONENT - ADMIN

Adding Custom Related List Component to Object

This LWC Related list component can be configured by the Administrator of the Org to any standard or custom object. To help understand the configuration steps, we are considering the Account object.

1. Click on App Launcher  icon
2. Select Sales App
3. Search for **Account** or Click on **Account** from **All Items** Menu.
4. Click on an account Record from the Account tab (if a Case record does not exist, create a new one).
5. Click on the **Gear** icon on the top right corner.
6. Click on the **Edit Page** to navigate to the Lightning App builder Screen.

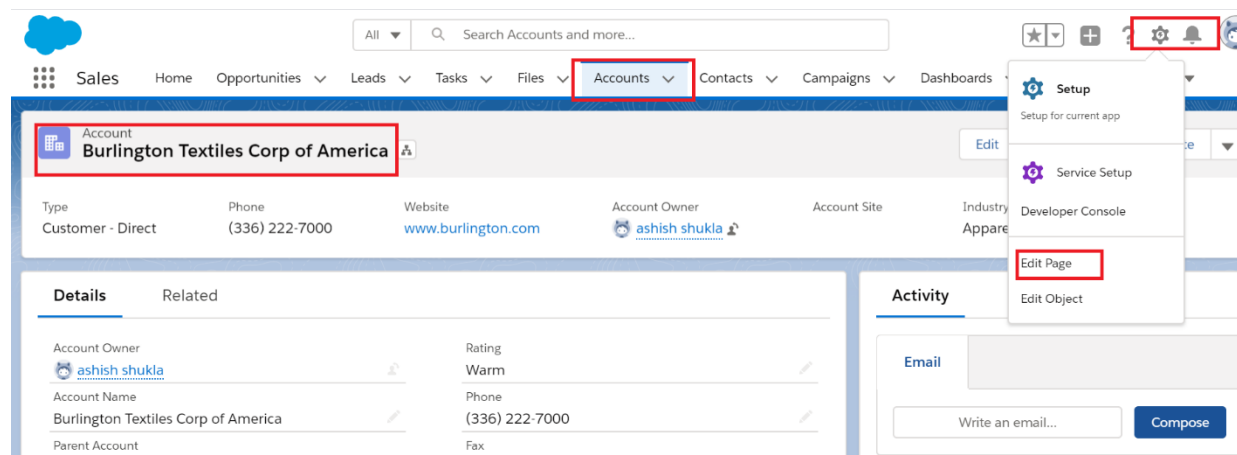
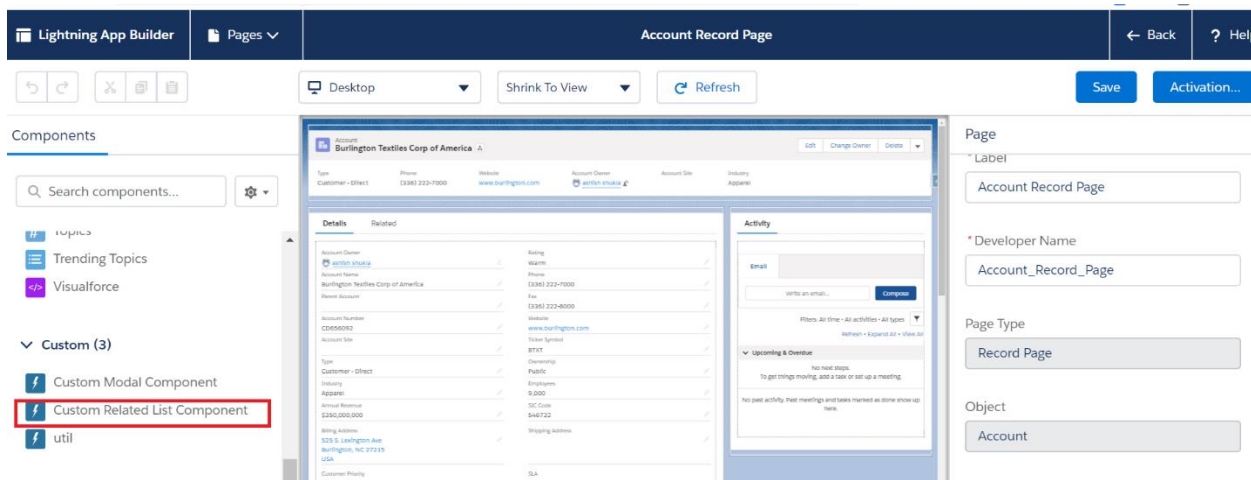


Figure 3. Editing the Account page layout.

7. Search for the **Custom_Related_List_Component**



8. Drag the **Custom_Related_List_Component** from the left panel and drop it on the **Account** Record Page under a related list tab.

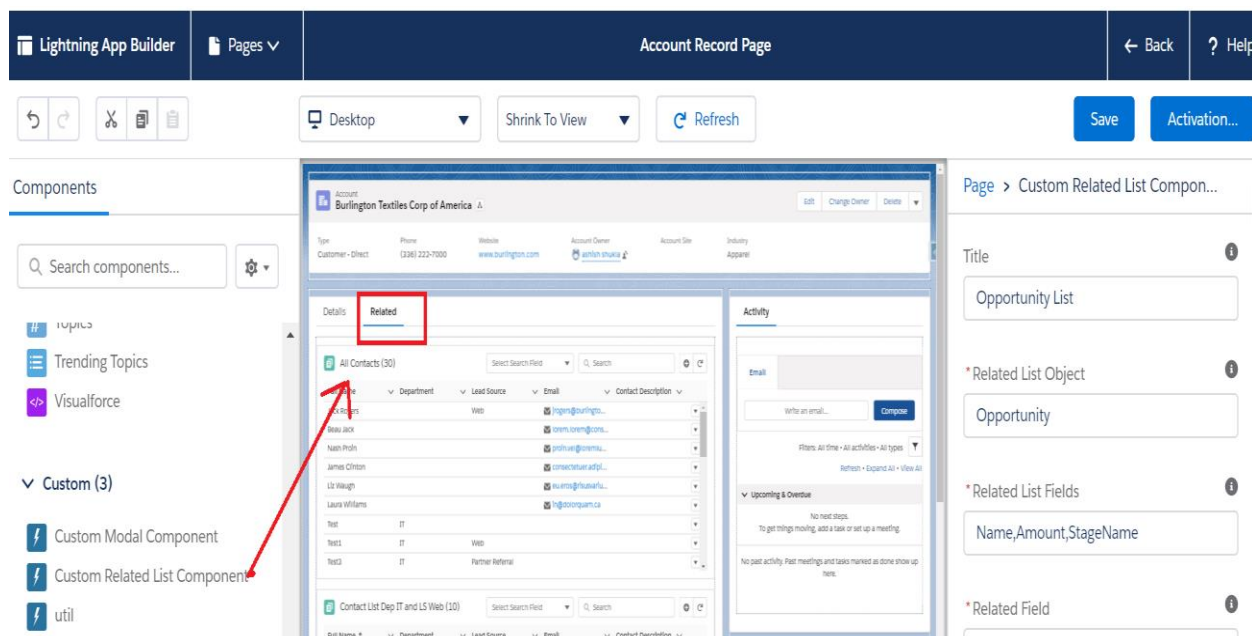
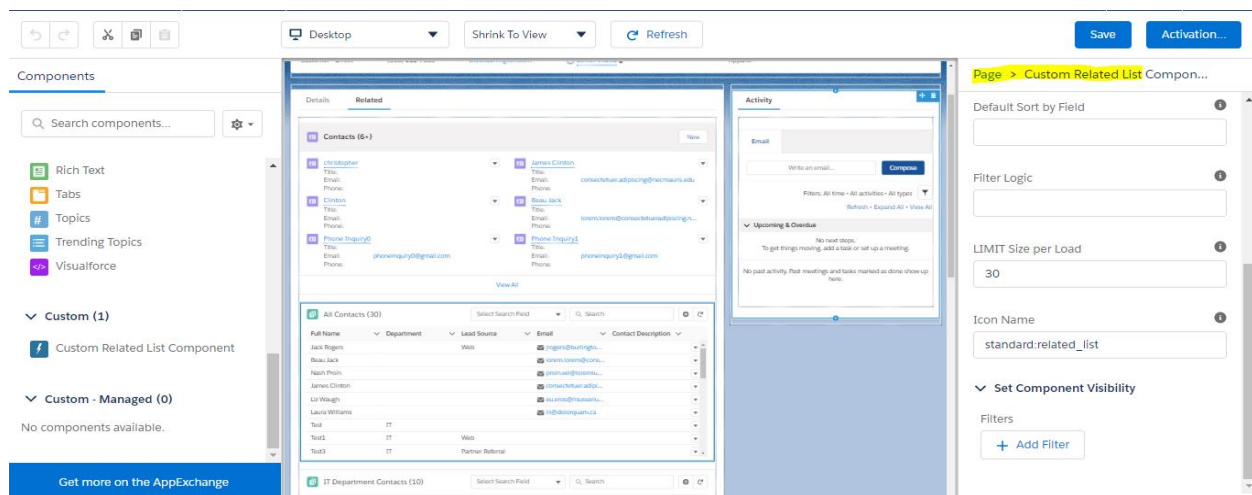


Figure 5. Adding the Custom Related List Component on the Account page layout under the Related tab.

9. **Related List Component configuration** screen appears to the **right** as shown below.



DESIGN PROPERTIES (CONFIGURATIONS)

1. Below filter option can be customized as per your need

- **Title** – Specify the title for the custom related list. If you wish you to leave it blank, then the plural label of the object would be the default title. For example, “Contacts with Empty Email and Phone”.
- **Related List Object** – Enter the object API name for the records to be displayed. For example, “Contact”.

Page > Custom Related List Compon...

Title ⓘ
Contacts With Empty Email and Phone

Related List Object ⓘ
Contact

Related List Fields ⓘ
name, Extentia_RLC__Contact_Status__c, eMail, P

Related Field ⓘ
AccountId

Default Sort by Field ⓘ
Name

Filter Logic ⓘ
((email <> null) and phone <> Null)

LIMIT Size per Load ⓘ
30

Icon Name ⓘ
standard:related_list

UnescapedHTML Field List ⓘ
Contact_Status__c, Link__c

• **Related List Fields** – Specify comma-separated multiple fields (API name) which will be shown as columns in the related list. For example, “Name, Email, Title, Phone”.

• **Related Field** – The relationship field’s API name must be entered. For example, “AccountId”.

• **Default Sort by Field** – For the List to be sorted by a specific field by default, enter the field’s API name. For example, “Name”.

• **Filter Logic** – To display records based on specific criteria, enter the default filters in this field. This field will allow to enter multiple **operator** conditions with logic i.e using AND, OR.

• **LIMIT Size per Load** – This field enables default records to be displayed. Enter the limit number of records to be shown initially and every time you scroll to the end of the table to load more data. By default, the limit size will be considered as “30” if you leave it blank.

• **Icon Name** – Provide the Lightning Design System’s name of the icon. The name can be written in the format 'standard:related_list' where 'standard' is the category, and 'related_list' is the specific icon to be

displayed. This icon is used by default. The icon is displayed in the header to the left of the title.

- **UnescapedHTML Field List** – Specify comma-separated field API names for showing field with UnescapedHTML. For example, “Name, Image__c”.

5. Click on **Save** to save changes.
6. Now click on the Activation button to activate the changes made.
7. A new popup for **Activation: Account Record Page**. In Org Default select Assign as Org Default and click on the Next button.

8. In the next popup select **Desktop and Phone** and click Next button and save changes.

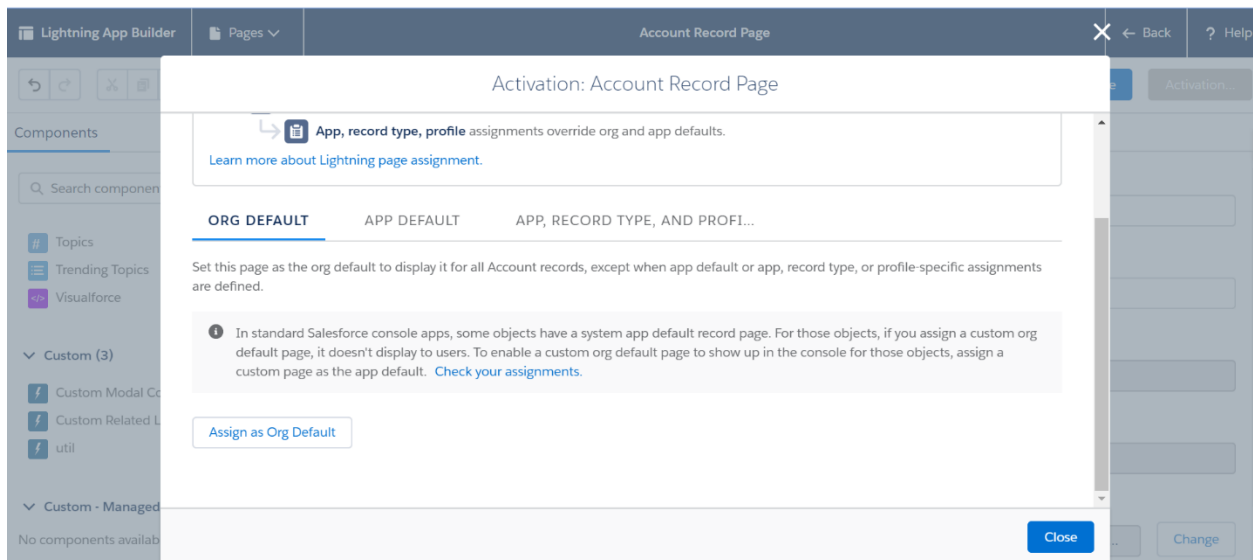


Figure 6. Assigning the updated Account page layout as ORG default

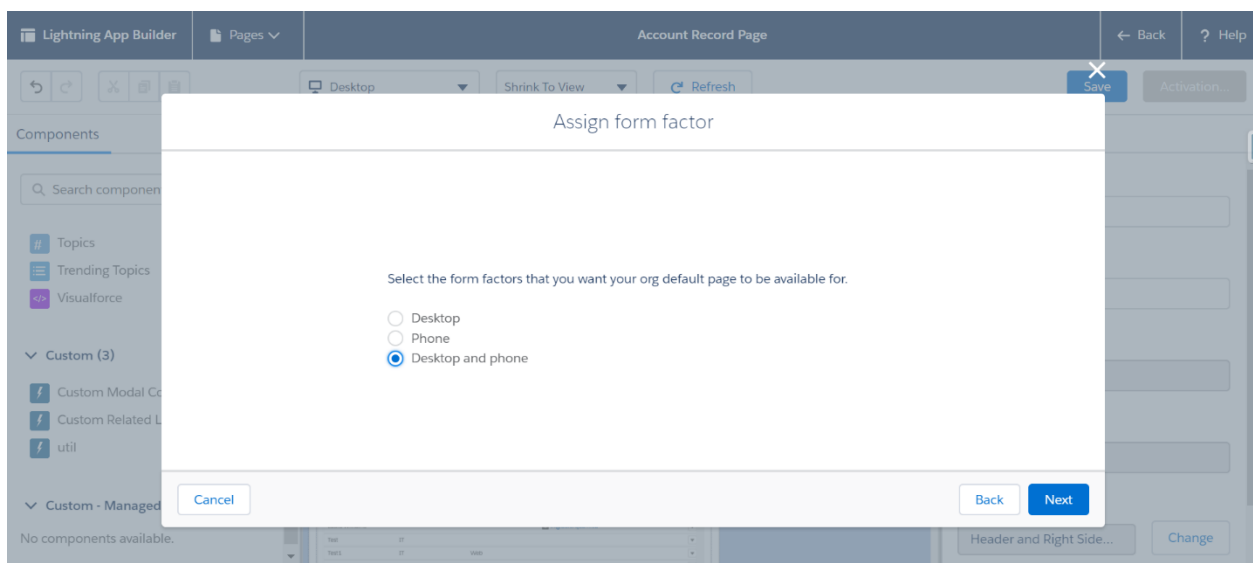
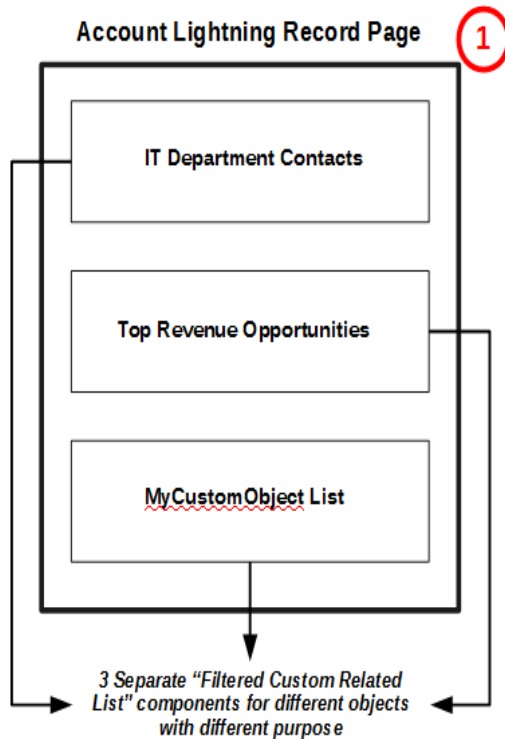


Figure 7. Applying the Case page layout for Desktop and phone.

9. Click on the Back button to navigate to **Account Record details** and check if the Custom Related List Component is present.

FEATURES OF OUR CUSTOM RELATED LIST COMPONENT



1. Supports Any Object which has a relationship (lookup or master-detail) with its parent object.
2. Add default filters while configuring this component on the records page to show specific records.
3. In addition to default sorting, sort records by clicking on columns in any direction.
4. The component provides infinite scrolling to display more data when users scroll to the end of the table.
5. Search records using all column fields except date, date/time, and Boolean fields.
6. This component has to be configured according to need as well as design attributes.
7. The data in the related list displayed in formatted columns according to their field's data type, such as email, phone, currency, etc.
8. You can view, edit, or delete any record from the related list.
9. You can also create a new record of the object-specific to the related list.

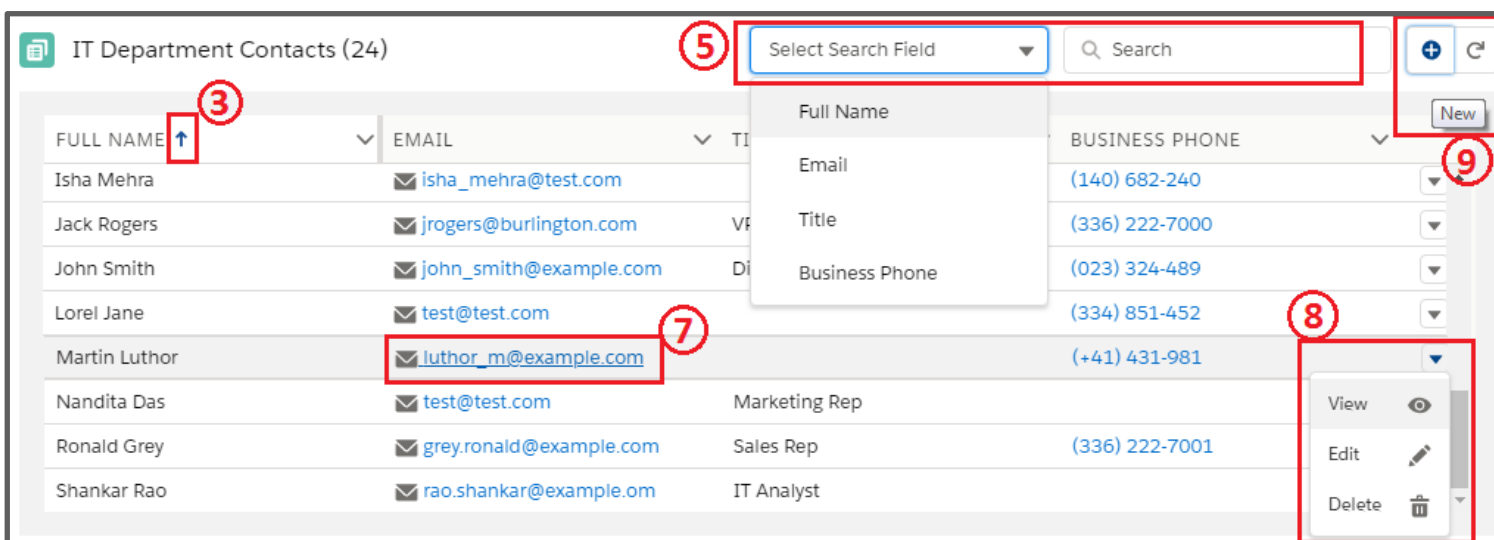


Figure 8. The Account page layout with Custom Related List Component.

NOTE: Currently LIKE operator is supported for string fields only.