![Pletra Technology logo]

Pletra Technologies

Tailored Salesforce solutions for your business success.

About Us

Pletratech's certified Salesforce specialists deliver tailored solutions to maximize ROI and streamline workflows. From setup to optimization, we have the experts to drive your success.

Why Us?

Pletra has a strong presence in multiple countries, with a focus on India. The company prides itself on delivering the best solutions to its clients while creating a friendly work environment for its employees. Pletra's team of experienced developers and designers work closely with clients to understand their unique needs and provide tailored solutions to meet their specific business requirements.

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Our Client

Workaround to overcome filter storage as per user preference

Challenges

- In Salesforce, the requirement is to manage user-specific preferences and filter settings within a Lightning Web Component (LWC).
- When a new user logs in for the first time, the system must automatically create a User Preference record for them.
- Additionally, when the user creates and saves a filter on the LWC page, a Document must be created to store the filter data, which is then attached to the User Preference record
- If the user modifies the filter values later, the existing Document should be updated with the new filter data.

Solution

- Create User Preference Record on First Login: Implement an LWC that triggers when a user logs in Use the connected Call back method in LWC to check if a User Preference record exists for the current user. If no record exists, call an Apex method to create a new User Preference record linked to the user.
- Save Filter Data as a Document: When a user saves a filter, capture the filter data and call an Apex method to create or update a Document with this data. Attach this Document to the User Preference record
- Update Document When Filter Changes: The same save Or Update Filter method in Apex will handle the update of the Document when the filter values change. This ensures the existing Document is overwritten with the new filter data.

Result

- When a new user logs into the LWC for the first time, a User Preference record is created automatically.
- Each time the user saves a filter, a Document is created with the filter data and attached to the User Preference record.
- If the user updates the filter, the existing Document is updated with the new filter data, ensuring the User Preference remains consistent and up-to-date.
- This solution ensures that user preferences and filters are managed efficiently, with seamless updates to existing records whenever changes occur.