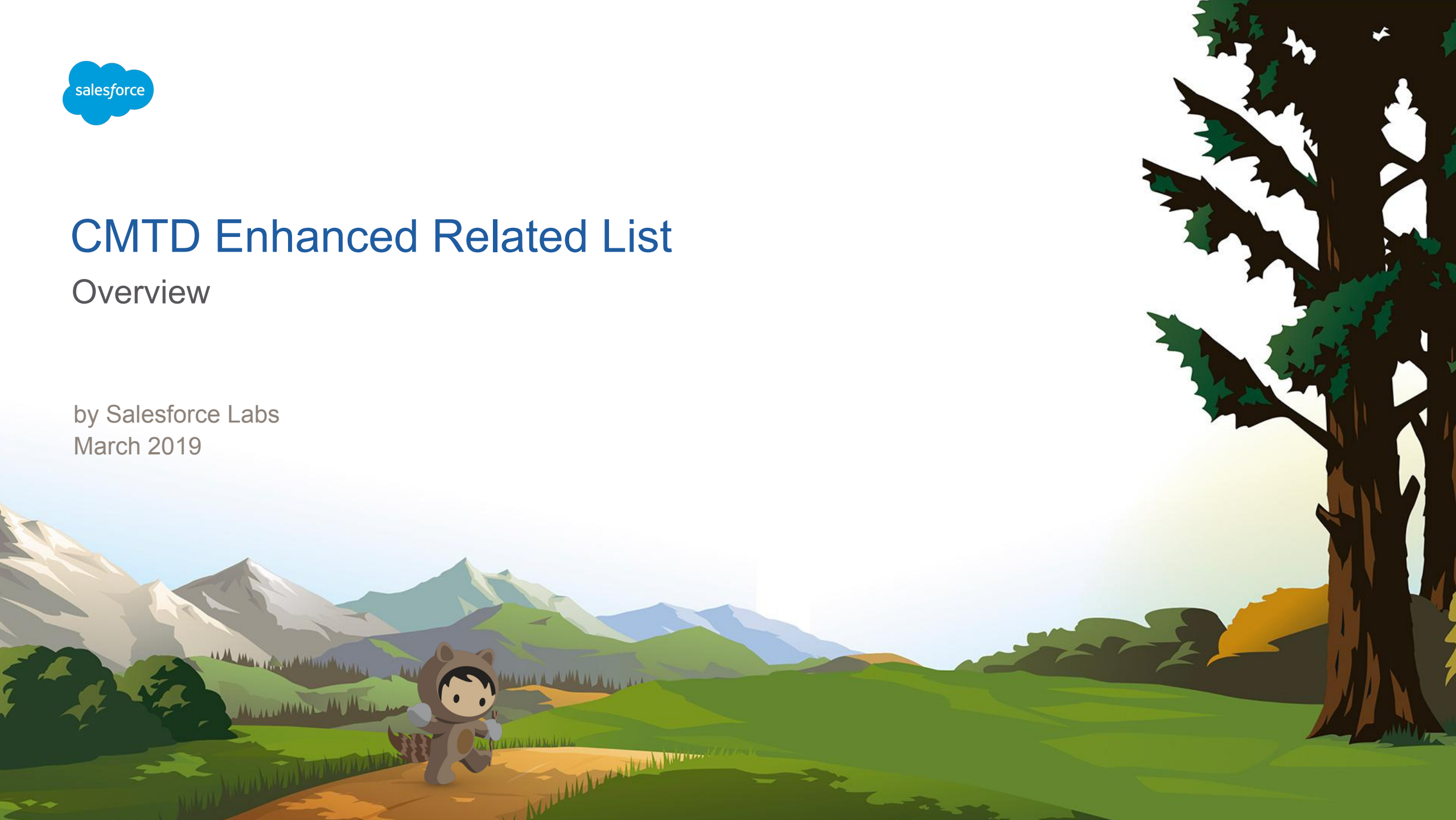




CMTD Enhanced Related List

Overview

by Salesforce Labs
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Overview



CMTD Enhanced Related List is a “[Custom Metadata Type Driven](#)” Lightning Component that provides enhanced features to display related list records in lightning app.

It supports [configurable filter, sort, and fields](#) that allow Administrator to group relevant records in a single page (eg: Open and Closed Cases)

The component is designed with [slds styling](#) and onced installed it is aimed for the administrator to manage using [point and click configuration](#) (no code required*):

- Create configuration data records in the “Enhanced Related List” Custom Metadata Type
- Drag and drop in App Builder
- Configure component attributes to suit your design

Refer to "**Feature Highlights**" for the summary of this component

*except for Advanced features



Overview

IdeaExchange

1. More than 4 fields on Related List in Lightning Experience
<https://success.salesforce.com/ideaView?id=0873A000000IEFbQAM>
2. Related List Sorting - More than one choice
<https://success.salesforce.com/ideaView?id=08730000000BrfNAAS>
3. Intelligent Related Lists (Filterable by Admin)
<https://success.salesforce.com/ideaView?id=08730000000BrbgAAC>
4. Change number of records visible in related list
<https://success.salesforce.com/ideaView?id=08730000000Br1rAAC>



Contents

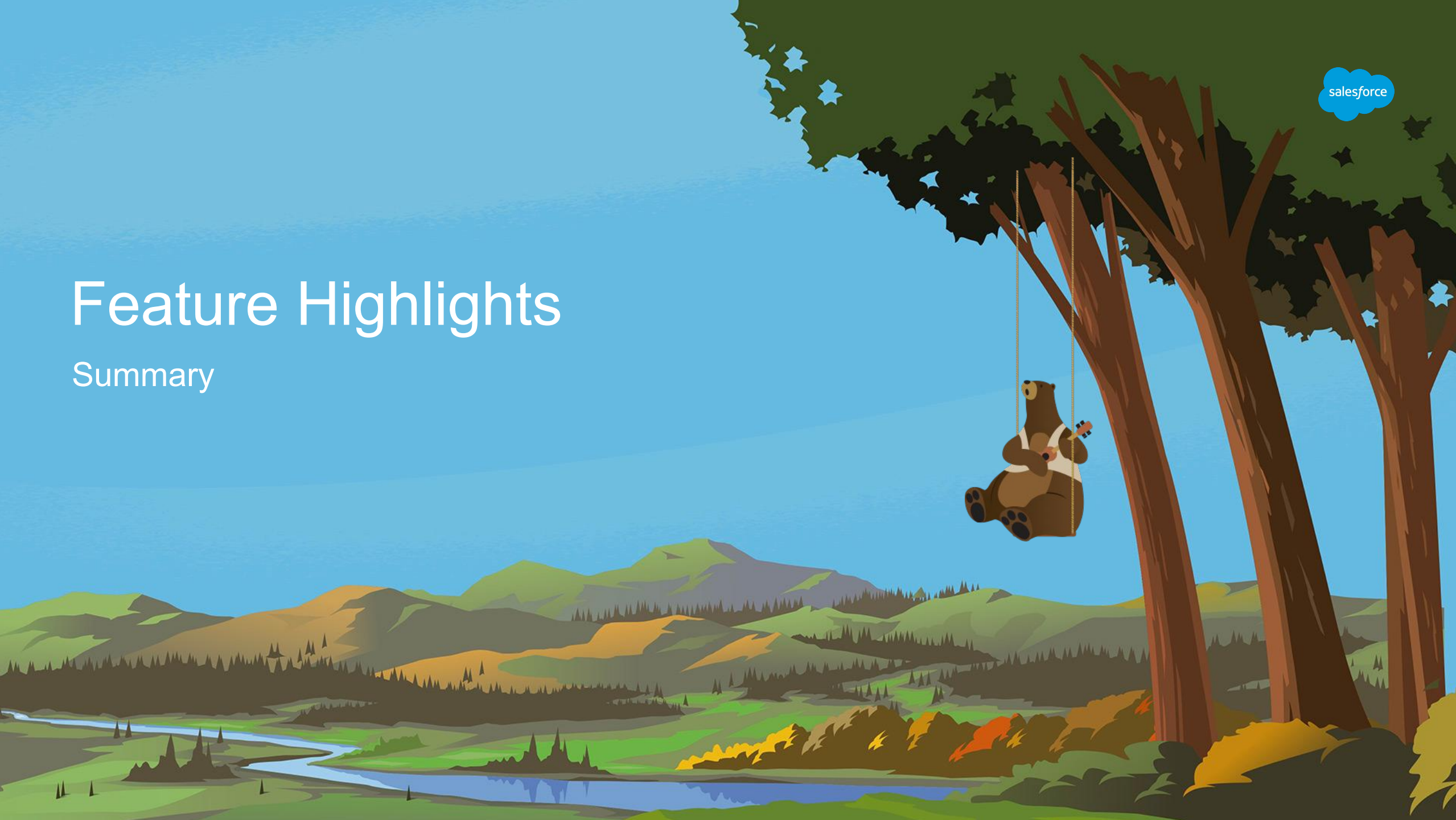


1. Feature Highlights
 - 1.1. Summary
 - 1.2. Comparison
2. Limitations
3. Roadmap
4. Links



Feature Highlights

Summary



Feature Highlights

Summary



1. Records displayed
 - 1.1. Configurable filter and sort criterias
 - 1.2. Configure different fields for each related list

The screenshot shows a Salesforce interface with two related lists: 'Open Cases (5)' and 'Closed Cases (3)'. The 'Open Cases' list is filtered by 'Status != Closed' and displays four cases with various details like Type, Origin, Reason, and Created Date. The 'Closed Cases' list is filtered by 'Status = Closed' and displays two cases with details like Type, Reason, Created Date, and Closed Date. Annotations in blue callouts highlight the filter expressions for each list.

Case ID	Status	Priority	Type	Origin	Reason	Created Date
00001028	Working	Low	Electrical	Web	Breakdown	2018-08-09 13:18:54
00001027	New	Medium	Structural	Phone	Performance	2018-08-09 13:09:30
00001008	Working	High	Other	Phone	Equipment Complexity	2018-06-05 11:28:02
00001013	Working	Medium	Other	Web	Equipment Design	2018-06-05 11:28:02

Case ID	Status	Priority	Type	Reason	Created Date	Closed Date
00001029	Closed	Medium			2018-08-09 13:19:16	2018-08-09 13:19:16
00001026	Closed	Medium	Mechanical	Feedback	2018-08-09 01:07:48	2018-08-09 01:07:59

Feature Highlights

Summary



2. Look and feel

- 2.1. View **Display mode** (List, Tile 1, Tile 2)
- 2.2. Record **header fields** (Tile mode only)
- 2.3. Choices of fields layout (1 column/ 2 columns)
- 2.4. SLDS Badge styling to highlight important field

The screenshot displays the Salesforce 'CASES' interface. At the top, there are tabs for 'CASES' and 'DETAILS'. Below this, there are two main sections: 'Open Cases (5)' and 'Closed Cases (3)'. Each section contains a list of case cards. The 'Open Cases' section shows three cards with details like 'Type', 'Origin', 'Reason', and 'Created Date'. The 'Closed Cases' section shows two cards with details like 'Type', 'Reason', 'Created Date', and 'Closed Date'. Callouts are present: 'Header fields' points to the top of a card in the 'Open Cases' section, and 'Tile 1 - 2 Columns' points to a card in the 'Closed Cases' section. A 'View All' link is visible at the bottom of each section. A 'New' button is in the top right of the 'Open Cases' section. The Salesforce logo is in the top right corner.

Case ID	Status	Priority	Type	Origin	Reason	Created Date
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Feature Highlights

Summary



- 3. Point and click configuration
 - 3.1. Component attributes options
 - 3.2. Custom Metadata Types to control fields data

1. Create Custom Metadata Types to configure the fields

Enhanced Related List

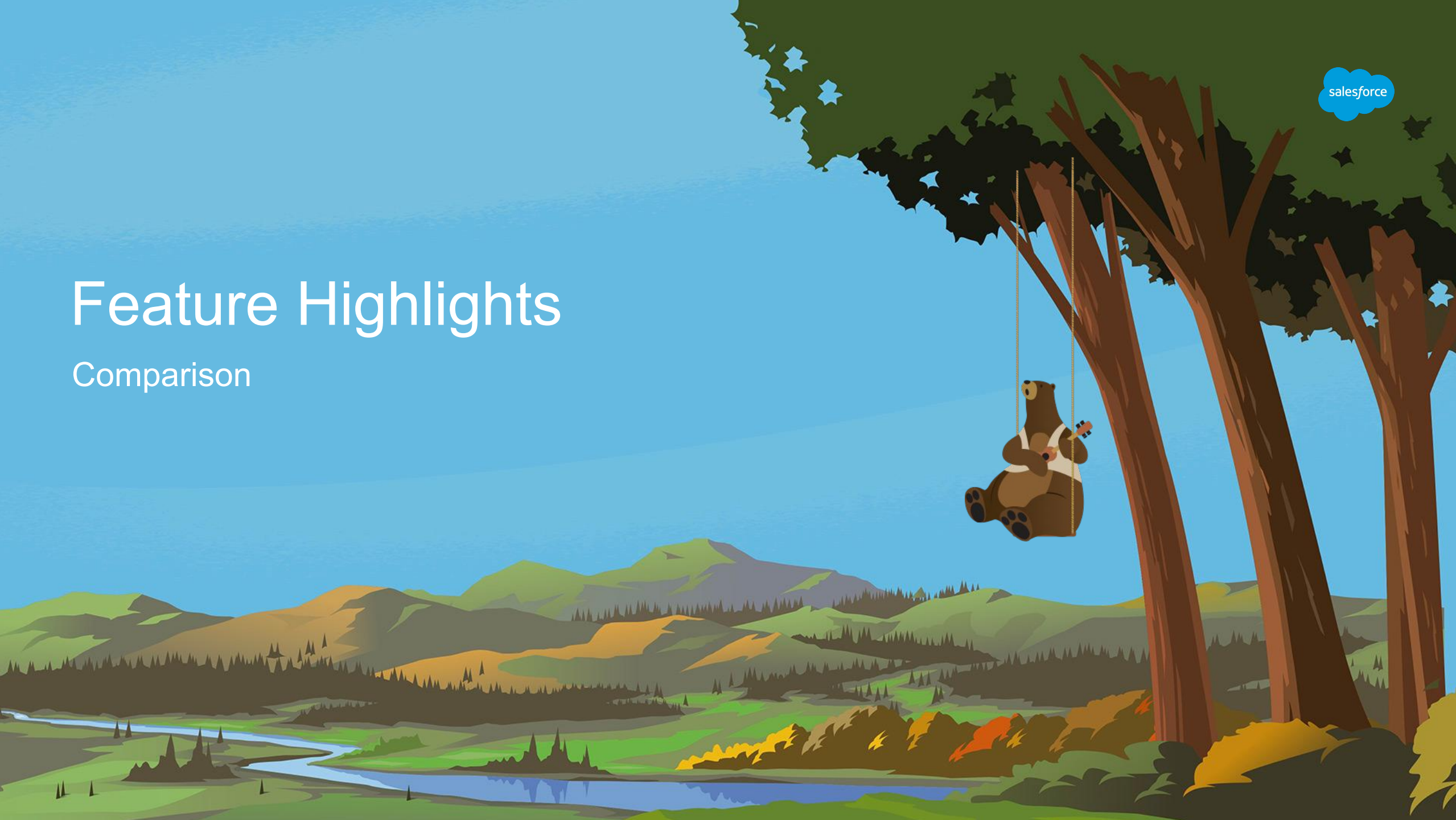
View: All Fields Edit Create New View

Action	Enhanced Related List Name ↑	Label	Related List Name	Field API Name	Header	Order	UI Type Override	Colour	Target API Name
Edit Del	TestOpenCases_CaseNumber	Case Number	TestOpenCases	CaseNumber	✓	1			Id
Edit Del	TestOpenCases_IsEscalated	Escalated	TestOpenCases	IsEscalated	✓	3	Badge	FF7F50	
Edit Del	TestOpenCases_Origin	Origin	TestOpenCases	Origin	☐	11			
Edit Del	TestOpenCases_Priority	Priority	TestOpenCases	Priority	☐	12			
Edit Del	TestOpenCases_Status	Status	TestOpenCases	Status	✓	2			
Edit Del	TestOpenCases_Subject	Subject	TestOpenCases	Subject	☐	13			
Edit Del	TestOpenCases_Type	Type	TestOpenCases	Type	☐	10			

The screenshot shows the Lightning App Builder interface for 'Account_Service_2_1'. On the left, the 'Lightning Components' panel shows 'CMTD Enhanced Related List' selected under 'Custom - Managed (1)'. A blue callout bubble points to the component with the text '2. Drag and drop the component'. The main canvas shows a preview of the component on a page for 'Grand Hotels & Resorts Ltd', displaying a table of 'Open Cases (5)' and 'Closed Cases (3)'. A second blue callout bubble points to the 'Component Attributes' panel on the right, which is titled 'Page > CMTD Enhanced Related List'. This panel contains several configuration options: 'Object API Name' (Case), 'Related List Name' (OpenCases), 'Parent Field' (AccountId), 'Records Display Type' (Tile 2), 'Layout Type' (1 Column), 'Sort' (CreatedDate DESC), and 'Filter' (Status != 'Closed'). A third blue callout bubble points to the 'Filter' attribute with the text '3. Use Component Attributes to control the features'. At the bottom left, there is a button that says 'Get more on the AppExchange'.

Feature Highlights

Comparison



Feature Highlights

Comparison



Category	Feature Type	Standard Related List ¹	CMTD Enhanced Related List
Record/ Field Access	Related list of same object on the same page	Yes <ul style="list-style-type: none"> • same filter and sort • same fields 	Yes <ul style="list-style-type: none"> • support different filter and sort • support different fields
	Related list object availability	Only for objects available in the related list page layout	Any object that has lookup relationships
	Filter	No	Filter configuration on component attributes
	Sort	Yes	Sort configuration on component attributes Support multiple sort option
	FLS Support	Yes	Yes
	Lookup field - Hover mouse	Yes	Yes - using Reference Field
	Lookup field - Record drilldown	Yes	Yes
	Formatted field (eg: Currency, Decimal,etc)	Yes	Yes
	Refresh on update	Auto	Manual

¹As of Spring 19 release

Feature Highlights

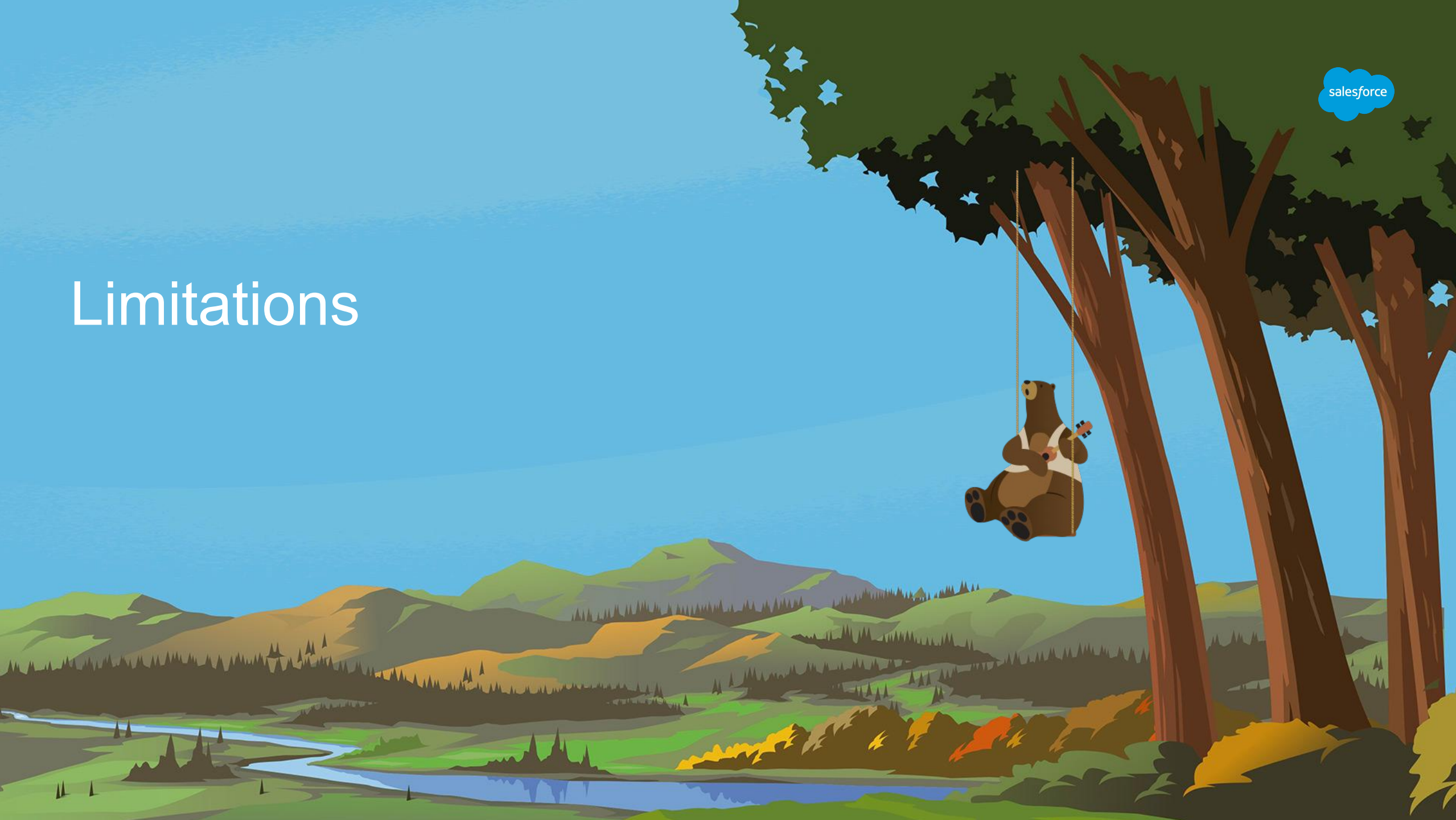
Comparison



Category	Feature Type	Standard Related List ¹	CMTD Enhanced Related List
Actions	New	Record Type Selector	Record Type Selector Default Record Type Custom Lightning Component
	Edit	Yes	Yes
	Delete	Yes	Yes
	Custom Action	Yes	No
Look and Feel	List mode	Yes	Yes
	Tile Mode	Auto	Tile 1: Display records in 1 column tile Tile 2: Display records in 2 column tile
	Header Fields (Tile mode)	Record Name	Multiple fields - Configurable
	Display of fields	1 Column	1 Column 2 Columns
	Label Override	No	Yes
	Enhanced UI	NA	Badge - for field value highlight

¹As of Spring 19 release

Limitations



Limitations



Type	Description
Max number of records = 500	This component is not designed to handle large records. Only the first 500 records are retrieved.
Max number of fields = 30	Only the first 30 records for each “Related List Name” (to display the fields) in the CMT are processed.
Auto Refresh	This component does not auto refresh the records (eg: after Edit or Create New). Please refresh the button manually using the Refresh button provided.
Custom Action	Not supported

Links



Links



1. AppExchange
https://sfdc.co/CMTD_ERL
2. User Guide
https://sfdc.co/CMTD_ERL_UserGuide
3. Examples
https://sfdc.co/CMTD_ERL_Examples
4. Trailblazer Community
https://sfdc.co/CMTD_ERL_Community

THANK YOU

