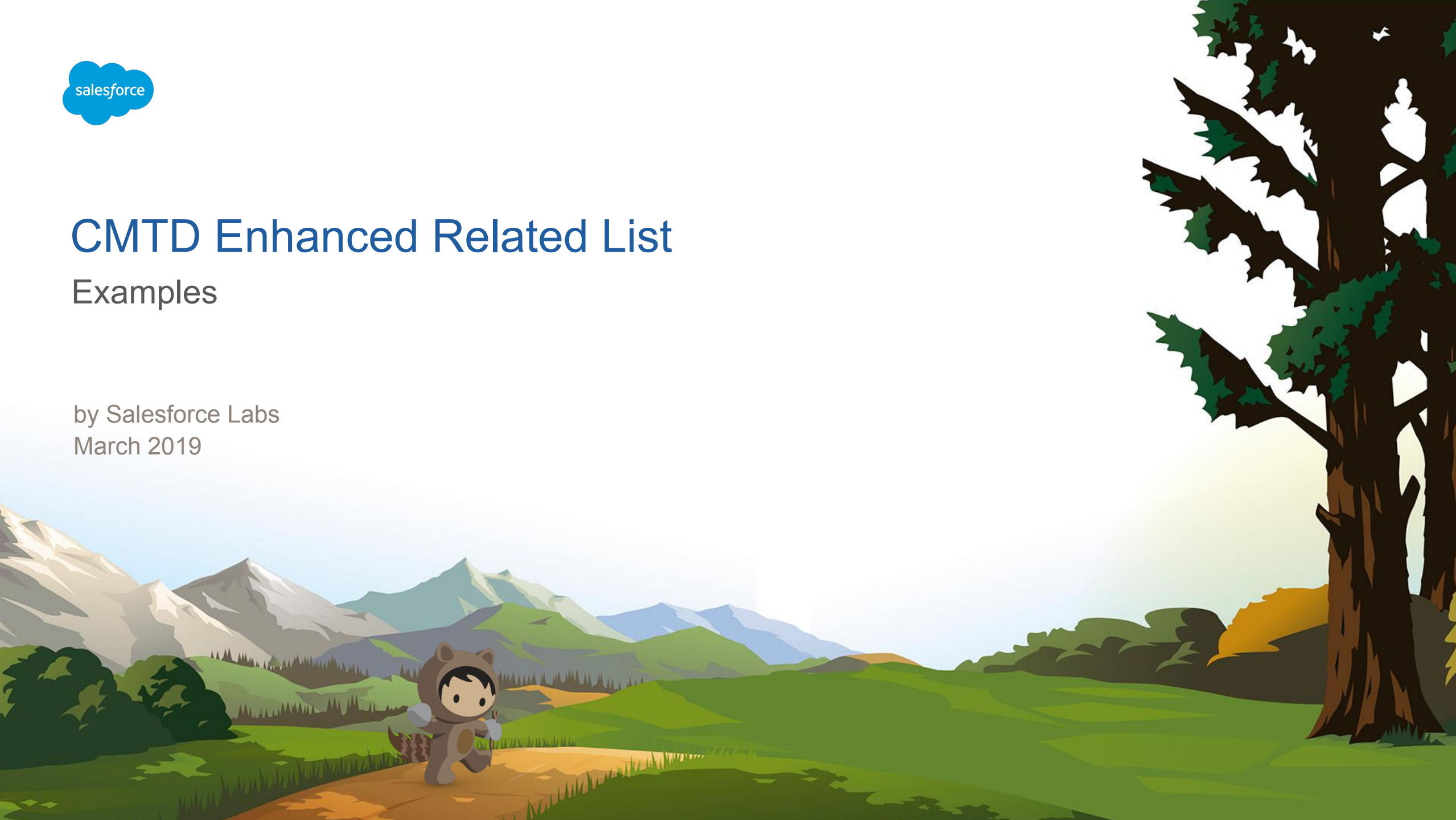




CMTD Enhanced Related List

Examples

by Salesforce Labs
March 2019



Contents



1. Different Fields
2. Common Fields
3. Using Badge UI Type
4. Using Target API Name
5. Multiple Sort Options
6. New Record with Record Types
7. Using Default Record Type

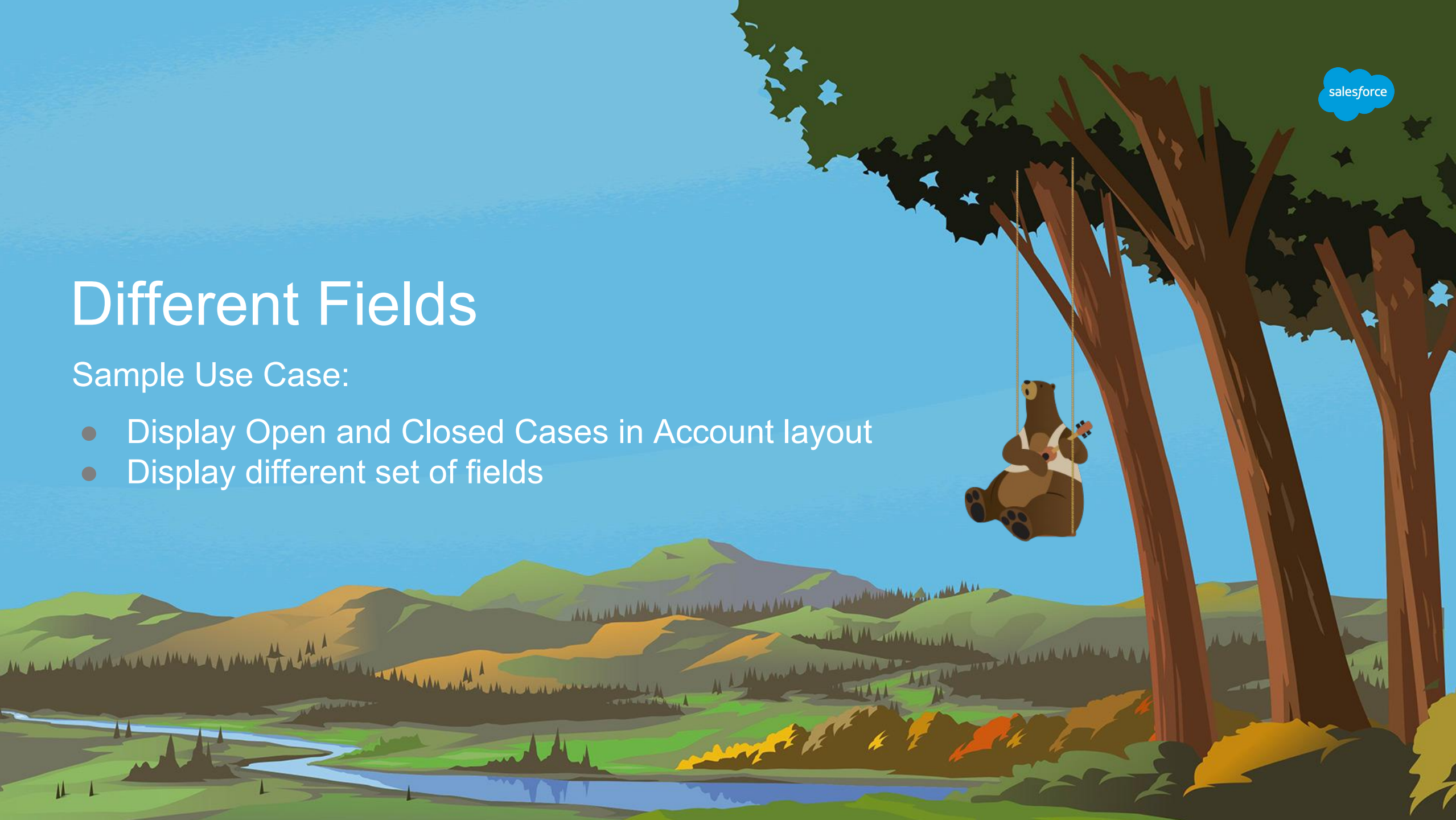
Note:

These examples are for illustration only

Different Fields

Sample Use Case:

- Display Open and Closed Cases in Account layout
- Display different set of fields



Preview



Account: Grand Hotels & Resorts Ltd

Type: Customer - Direct | Phone: (312) 596-1000 | Website: www.grandhotels.com | Account Owner: Denny Chandra | Industry: Hospitality

OPEN OPPTY

Open Oppty (3)

- Service Cleaning - Prospecting**
Amount: \$ 25
Forecast: Pipeline
Type: Existing Customer - Upgrade
Created Date: 2018-08-09 14:20:54
Close Date: 2018-08-15 00:00:00
- Grand Hotels Guest Portable Generators - Value Proposition**
Amount: \$ 250000
Forecast: Pipeline
Type: Existing Customer - Upgrade
Created Date: 2018-06-05 11:28:02
Close Date: 2018-06-01 00:00:00
- Grand Hotels Kitchen Generator - Id. Decision Makers**
Amount: \$ 15000
Forecast: Pipeline
Type: Existing Customer - Upgrade
Created Date: 2018-06-05 11:28:02
Close Date: 2018-02-21 00:00:00

Open Cases (5)

- 00001028 - Working - Low**
Type: Electrical
Origin: Web
Reason: Breakdown
Created Date: 2018-08-09 13:18:54
Created By: Denny Chandra
- 00001027 - New - Medium**
Type: Structural
Origin: Phone
Reason: Performance
Created Date: 2018-08-09 13:09:30
Created By: Denny Chandra

Closed Cases (3)

- 00001029 - Medium**
Type: Mechanical
Created Date: 2018-08-09 13:19:16
Reason: Performance
Closed Date: 2018-08-09 13:19:16
- 00001026 - Medium**
Type: Mechanical
Created Date: 2018-08-09 01:07:48
Reason: Feedback
Closed Date: 2018-08-09 01:07:59

ACTIVITY

New Task | Log a Call | New Event | Email

Create a task... **Add**

Filters: All time • All activities • All types

Next Steps | More Steps

Call | You have an upcoming Task with John Bond | 15/08

Step 1a - Create OpenCases CMTD records



Related List Name = OpenCases

Name	Label	Related List Name	Field API Name	Header	Order	UI Type Override	Colour	Target API Name
OpenCases_CaseNumber	Case Number	OpenCases	CaseNumber	true	1			Id
OpenCases_Status	Status	OpenCases	Status	true	2			
OpenCases_Priority	Priority	OpenCases	Priority	true	3			
OpenCases_Type	Type	OpenCases	Type		10			
OpenCases_Origin	Origin	OpenCases	Origin		11			
OpenCases_Reason	Reason	OpenCases	Reason		12			
OpenCases_CreatedDate	Created Date	OpenCases	CreatedDate		13			

Enhanced Related List Help for this Page ?

View Open Cases 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	OpenCases_CaseNumber	<u>Case Number</u>	OpenCases	CaseNumber	<input checked="" type="checkbox"/>	1			Id
Edit Del	OpenCases_Status	<u>Status</u>	OpenCases	Status	<input checked="" type="checkbox"/>	2			
Edit Del	OpenCases_Priority	<u>Priority</u>	OpenCases	Priority	<input checked="" type="checkbox"/>	3			
Edit Del	OpenCases_Type	<u>Type</u>	OpenCases	Type	<input type="checkbox"/>	10			
Edit Del	OpenCases_Origin	<u>Origin</u>	OpenCases	Origin	<input type="checkbox"/>	11			
Edit Del	OpenCases_Reason	<u>Reason</u>	OpenCases	Reason	<input type="checkbox"/>	15			
Edit Del	OpenCases_CreatedDate	<u>Created Date</u>	OpenCases	CreatedDate	<input type="checkbox"/>	16			

Screenshot of the OpenCases CMT records after creation.

Hint:

Create the 'Open Cases' list view to manage your records (Related List Name = OpenCases)

Step 1b - Create ClosedCases CMTD records



Related List Name = ClosedCases

Name	Label	Related List Name	Field API Name	Header	Order	UI Type Override	Colour	Target API Name
ClosedCases_CaseNumber	Case Number	ClosedCases	CaseNumber	true	1			Id
ClosedCases_Priority	Priority	ClosedCases	Priority	true	2			
ClosedCases_Type	Type	ClosedCases	Type		10			
ClosedCases_CreatedDate	Created Date	ClosedCases	CreatedDate		11			
ClosedCases_Reason	Reason	ClosedCases	Reason		12			
ClosedCases_ClosedDate	Closed Date	ClosedCases	ClosedDate		13			

Enhanced Related List Help for this Page ?

View: Closed Cases | [Edit](#) | [Create New View](#)

[New](#)

Action	Enhanced Related List Name	Label	Related List Name	Field API Name	Header	Order	UI Type Override	Colour	Target API Name
Edit Del	ClosedCases_CaseNumber	<u>Case Number</u>	ClosedCases	CaseNumber	<input checked="" type="checkbox"/>	1			Id
Edit Del	ClosedCases_Priority	<u>Priority</u>	ClosedCases	Priority	<input checked="" type="checkbox"/>	3			
Edit Del	ClosedCases_Type	<u>Type</u>	ClosedCases	Type	<input type="checkbox"/>	10			
Edit Del	ClosedCases_CreatedDate	<u>Created Date</u>	ClosedCases	CreatedDate	<input type="checkbox"/>	14			
Edit Del	ClosedCases_Reason	<u>Reason</u>	ClosedCases	Reason	<input type="checkbox"/>	15			
Edit Del	ClosedCases_ClosedDate	<u>Closed Date</u>	ClosedCases	ClosedDate	<input type="checkbox"/>	18			

Screenshot of the ClosedCases CMT records after creation.

Hint:
Create the 'Closed Cases' list view to manage your records (Related List Name = ClosedCases)

Step 2 - App Builder

Drag 2 components for Open and Closed Case



Lightning App Builder | Pages | Account_Page_2-1 | Back | Help

Desktop | Shrink To View | Refresh | Save | Activation...

Lightning Components

- Standard (0)
- Custom (0)
- Custom - Managed (1)
 - CMTD Enhanced Related List

Account: Grand Hotels & Resorts Ltd

Type: Customer - Direct | Phone: (312) 596-1000 | Website: www.grandhotels.com | Account Owner: Denny Chandra | Account Site: | Industry: Hospitality

OPEN OPPTY

- Open Oppty (3)**
 - Service Cleaning - Prospecting**
 - Amount: \$ 25
 - Forecast: Pipeline
 - Type: Existing Customer - Upgrade
 - Created Date: 2018-08-09 14:20:54
 - Close Date: 2018-08-15 00:00:00
 - Grand Hotels Guest Portable Generators - Value Proposition**
 - Amount: \$ 250000
 - Forecast: Pipeline
 - Type: Existing Customer - Upgrade
 - Created Date: 2018-06-05 11:28:02
 - Close Date: 2018-06-01 00:00:00
 - Grand Hotels Kitchen Generator - Id. Decision Makers**
 - Amount: \$ 15000
 - Forecast: Pipeline
 - Type: Existing Customer - Upgrade
 - Created Date: 2018-06-05 11:28:02
 - Close Date: 2018-02-21 00:00:00

Open Cases (5)

- 00001028 - Working - Low**
 - Type: Electrical
 - Origin: Web
 - Reason: Breakdown
 - Created Date: 2018-08-09 13:18:54
 - Created By: Denny Chandra
- 00001027 - New - Medium**
 - Type: Structural
 - Origin: Phone
 - Reason: Performance
 - Created Date: 2018-08-09 13:09:30
 - Created By: Denny Chandra

Closed Cases (3)

- 00001029 - Medium**
 - Type: Mechanical
 - Created Date: 2018-08-09 13:19:16
 - Reason: Performance
 - Closed Date: 2018-08-09 13:19:16
- 00001026 - Medium**
 - Type: Mechanical
 - Created Date: 2018-08-09 01:07:48
 - Reason: Feedback
 - Closed Date: 2018-08-09 01:07:59

ACTIVITY | CHATTER | DETAILS

New Task: Log a Call | New Event | Email

Create a task... Add

Filters: All time | All activities | All types

Next Steps: Call (15/08) - You have an upcoming Task with John Bond

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

Page > CMTD Enhanced Related List

- Object API Name: Case
- Related List Name: ClosedCases
- Parent Field: AccountId
- Records Display Type: Tile 1
- Fields Layout Type: 1 Column
- Filter: Status='Closed'
- Sort: CreatedDate DESC

Get more on the AppExchange



Step 3 - Configure Component Attributes

Open Cases and Closed Cases

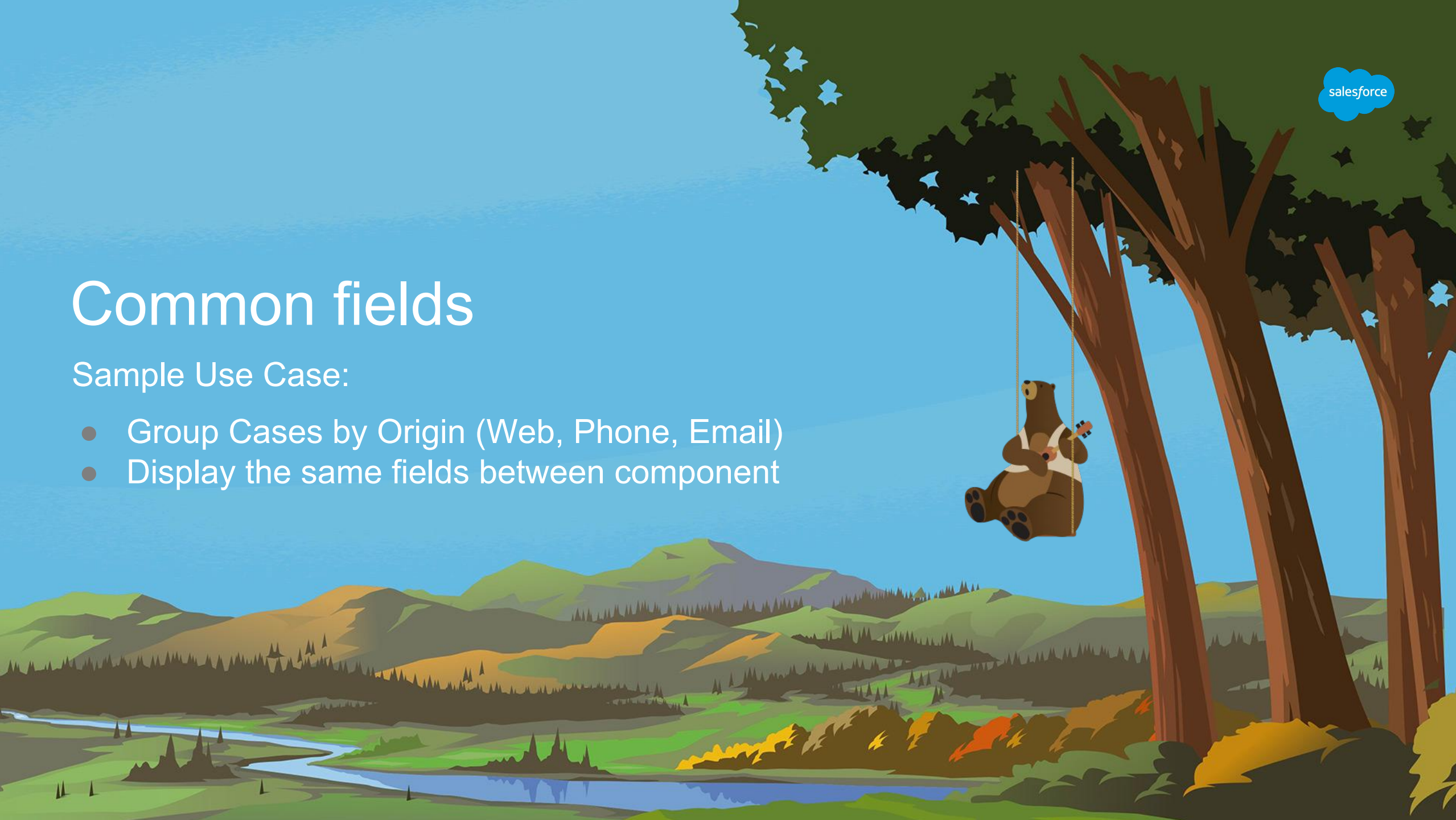
	Open Cases	Closed Cases
Object API Name	Case	Case
Related List Name	OpenCases	ClosedCases
Parent Field	AccountId	AccountId
Record Display Type	Tile 1	Tile 1
Fields Layout Type	1 Column	1 Column
Filter	Status!='Closed'	Status='Closed'
Sort	CreatedDate DESC	CreatedDate DESC
Default Number of Records to Display	2	2
Title	Open Cases	Closed Cases
Icon Name	standard:case	standard:case
New Record	Standard	Standard
Show Header?	true	true
Show Refresh Button?	true	true

Hint: Use 'Tile 2' for wide layout

Common fields

Sample Use Case:

- Group Cases by Origin (Web, Phone, Email)
- Display the same fields between component



Preview



Account: **Grand Hotels & Resorts Ltd**

Type: Customer - Direct | Phone: (312) 596-1000 | Website: www.grandhotels.com | Account Owner: Denny Chandra | Account Site: | Industry: Hospitality

OPEN OPPTY

Open Oppty (3)

- Service Cleaning · Prospecting**
Amount: \$ 25
Forecast: Pipeline
Type: Existing Customer - Upgrade
Created Date: 2018-08-09 14:20:54
Close Date: 2018-08-15 00:00:00
- Grand Hotels Guest Portable Generators · Value Proposition**
Amount: \$ 250000
Forecast: Pipeline
Type: Existing Customer - Upgrade
Created Date: 2018-06-05 11:28:02
Close Date: 2018-06-01 00:00:00
- Grand Hotels Kitchen Generator · Id. Decision Makers**
Amount: \$ 15000
Forecast: Pipeline
Type: Existing Customer - Upgrade
Created Date: 2018-06-05 11:28:02
Close Date: 2018-02-21 00:00:00

[View All](#)

Web (2)

- 00001028 · Working · Low**
Type: Electrical
Reason: Breakdown
Created Date: 2018-08-09 13:18:54
[View All](#)

Phone (2)

- 00001026 · Closed · Medium**
Type: Mechanical
Reason: Feedback
Created Date: 2018-08-09 01:07:48
[View All](#)

Email (1)

- 00001007 · New · Medium**
Type: Structural
Reason: Breakdown
Created Date: 2018-06-05 11:28:02
[View All](#)

ACTIVITY

New Task | Log a Call | New Event | Email

Create a task... [Add](#)

Filters: All time · All activities · All types

Next Steps: [More Steps](#)

- Call | You have an upcoming Task with [John Bond](#) | 15/08

Past Activities

No past activity. Past meetings and tasks marked as done show up here. [Load More Past Activities](#)

Step 1 - Create Cases CMTD records



Related List Name = Cases

Name	Label	Related List Name	Field API Name	Header	Order	UI Type Override	Colour	Target API Name
Cases_CaseNumber	Case Number	Cases	CaseNumber	true	1			Id
Cases_Status	Status	Cases	Status	true	2			
Cases_Priority	Priority	Cases	Priority	true	3			
Cases_Type	Type	Cases	Type		10			
Cases_Reason	Reason	Cases	Reason		12			
Cases_CreatedDate	Created Date	Cases	CreatedDate		13			

Enhanced Related List Help for this Page

View: Cases [Edit](#) | [Create New View](#)

[New](#)

Action	Enhanced Related List Name	Label	Related List Name	Field API Name	Header	Order	UI Type Override	Colour	Target API Name
Edit Del	Cases_CaseNumber	<u>Case Number</u>	Cases	CaseNumber	<input checked="" type="checkbox"/>	1			Id
Edit Del	Cases_Status	<u>Status</u>	Cases	Status	<input checked="" type="checkbox"/>	2			
Edit Del	Cases_Priority	<u>Priority</u>	Cases	Priority	<input checked="" type="checkbox"/>	3			
Edit Del	Cases_Type	<u>Type</u>	Cases	Type	<input type="checkbox"/>	10			
Edit Del	Cases_Reason	<u>Reason</u>	Cases	Reason	<input type="checkbox"/>	15			
Edit Del	Cases_CreatedDate	<u>Created Date</u>	Cases	CreatedDate	<input type="checkbox"/>	16			

Screenshot of the Cases CMT records after creation.

Hint:

Create the 'Cases' list view to manage your records (Related List Name = Cases)

Step 2 - App Builder



Drag 3 components for Web, Phone and Email Case

Lightning App Builder | Pages | Account_Page_2-1 | Back | Help

Desktop | Shrink To View | Refresh

Lightning Components

- Standard (0)
- Custom (0)
- Custom - Managed (1)
 - CMTD Enhanced Related List

Account: Grand Hotels & Resorts Ltd

Type: Customer - Direct | Phone: (312) 596-1000 | Website: www.grandhotels.com | Account Owner: Denny Chandra | Account Site: | Industry: Hospitality

OPEN OPPTY

- Open Oppty (3)**
 - Service Cleaning - Prospecting
 - Amount: \$ 25
 - Forecast: Pipeline
 - Type: Existing Customer - Upgrade
 - Created Date: 2018-08-09 14:20:54
 - Close Date: 2018-08-15 00:00:00
 - Grand Hotels Guest Portable Generators - Value Proposition
 - Amount: \$ 250000
 - Forecast: Pipeline
 - Type: Existing Customer - Upgrade
 - Created Date: 2018-06-05 11:28:02
 - Close Date: 2018-06-01 00:00:00
 - Grand Hotels Kitchen Generator - Id. Decision Makers
 - Amount: \$ 15000
 - Forecast: Pipeline
 - Type: Existing Customer - Upgrade
 - Created Date: 2018-06-05 11:28:02
 - Close Date: 2018-02-21 00:00:00

Web (2)

- 00001028 - Working - Low
 - Type: Electrical
 - Reason: Breakdown
 - Created Date: 2018-08-09 13:18:54

Phone (2)

- 00001026 - Closed - Medium
 - Type: Mechanical
 - Reason: Feedback
 - Created Date: 2018-08-09 01:07:48

Email (1)

- 00001007 - New - Medium
 - Type: Structural
 - Reason: Breakdown
 - Created Date: 2018-06-05 11:28:02

ACTIVITY | CHATTER | DETAILS

New Task: Log a Call | New Event | Email

Create a task... Add

Filters: All time - All activities - All types

Next Steps: Call (15/08) - You have an upcoming Task with John Bond

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

Save | Activation...

Page > CMTD Enhanced Related List

- Object API Name: Case
- Related List Name: Cases
- Parent Field: AccountId
- Records Display Type: Tile 1
- Fields Layout Type: 1 Column
- Filter: Status!='Closed' AND Origin='Email'
- Sort: CreatedDate DESC

Get more on the AppExchange

Step 3 - Configure Component Attributes



Web, Phone and Email Case

	Web	Phone	Email
Object API Name	Case	Case	Case
Related List Name	Cases	Cases	Cases
Parent Field	AccountId	AccountId	AccountId
Record Display Type	Tile 1	Tile 1	Tile 1
Fields Layout Type	1 Column	1 Column	1 Column
Filter	Status!='Closed' AND Origin='Web'	Status!='Closed' AND Origin='Phone'	Status!='Closed' AND Origin='Email'
Sort	CreatedDate DESC	CreatedDate DESC	CreatedDate DESC
Default Number of Records to Display	1	1	1
Title	Web	Phone	Email
Icon Name	standard:case	standard:case	standard:case
New Record	standard	standard	standard
Show Header?	true	true	true
Show Refresh Button?	true	true	true

Using Badge UI Type

Sample Use Case:

- Using the same scenario to display Open and Close Cases
- Use Badge to highlight important fields
(When a case is Escalated or breached SLA)



Preview



Service Console | Accounts | Grand Hotels & Res...

Account: Grand Hotels & Resorts Ltd

Type: Customer - Direct | Phone: (312) 596-1000 | Website: www.grandhotels.com | Account Owner: Denny Chandra | Account Site: | Industry: Hospitality

CASES | DETAILS

Open Cases (5)

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

[View All](#)

Closed Cases (3)

00001029 · Medium Type: Mechanical Created Date: 2018-08-09 13:19:16 Reason: Feedback Closed Date: 2018-08-09 13:19:16	00001026 · Medium Type: Mechanical Created Date: 2018-08-09 01:07:48 Reason: Feedback Closed Date: 2018-08-09 01:07:59
00001014 · High Type: Other Created Date: 2018-06-05 11:28:02 Reason: Installation Closed Date: 2017-04-17 18:59:51	

[View All](#)

ACTIVITY | CHATTER | OPPTY

New Task | Log a Call | New Event | Email

Create a task... **Add**

Filters: All time · All activities · All types

Refresh Expand All

Next Steps [More Steps](#)

Call **15/08**
You have an upcoming Task with [John Bond](#)

Past Activities

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

[Load More Past Activities](#)

History



Step 1 - Create CMTD records with Badge

Related List Name = OpenCases

This example is an extension from the “Different Fields” example (Related List Name = OpenCases)

Create additional records:

Name	Label	Related List Name	Field API Name	Header	Order	UI Type Override	Colour	Target API Name
OpenCases_Escalated	Escalated	OpenCases	Escalated_Flag_F__c	true	4	Badge	FF7F50	
OpenCases_SLAViolated	SLA Violated	OpenCases	SLA_Violation_Flag_F__c	true	5	Badge	FF0000	

Case custom fields (formula):

- Escalated_Flag_F__c (Display ‘Escalated’ text when case is escalated)
 - If(IsEscalated , "Escalated", "")
- SLA_Violation_Flag_F__c (Display ‘SLA’ text when case violated SLA):
 - If(ISPICKVAL(SLAViolation__c, "Yes"), "SLA", "")

Step 1 - Create CMTD records with Badge



Related List Name = OpenCases

Screenshot of the OpenCases CMT records after creating the additional records.

Enhanced Related List Help for this Page ?

View **Open Cases** | Edit | Create New View

New

Action	Enhanced Related List Name	Label	Related List Name	Field API Name	Header	Order ↑	UI Type Override	Colour	Target API Name
Edit Del	OpenCases_CaseNumber	<u>Case Number</u>	OpenCases	CaseNumber	✓	1			Id
Edit Del	OpenCases_Status	<u>Status</u>	OpenCases	Status	✓	2			
Edit Del	OpenCases_Priority	<u>Priority</u>	OpenCases	Priority	✓	3			
Edit Del	OpenCases_Escalated	<u>Escalated</u>	OpenCases	Escalated_Flag_F__c	✓	6	Badge	FF7F50	
Edit Del	OpenCases_SLAViolated	<u>SLA Violated</u>	OpenCases	SLA_Violation_Flag_F__c	✓	7	Badge	FF0000	
Edit Del	OpenCases_Type	<u>Type</u>	OpenCases	Type	☐	10			
Edit Del	OpenCases_Origin	<u>Origin</u>	OpenCases	Origin	☐	11			
Edit Del	OpenCases_Reason	<u>Reason</u>	OpenCases	Reason	☐	15			
Edit Del	OpenCases_CreatedDate	<u>Created Date</u>	OpenCases	CreatedDate	☐	16			

Using Target API Name

Sample Use Case:

- Using the same scenario to display Open and Close Cases
- Display hyperlink field (Created By)
User will be navigated to a User record



Preview



Account: **Grand Hotels & Resorts Ltd**

Type: Customer - Direct | Phone: (312) 596-1000 | Website: www.grandhotels.com | Account Owner: Denny Chandra | Account Site: | Industry: Hospitality

OPEN OPPTY

Open Oppty (3)

- Service Cleaning · Prospecting**
Amount: \$ 25
Forecast: Pipeline
Type: Existing Customer - Upgrade
Created Date: 2018-08-09 14:20:54
Close Date: 2018-08-15 00:00:00
- Grand Hotels Guest Portable Generators · Value Proposition**
Amount: \$ 250000
Forecast: Pipeline
Type: Existing Customer - Upgrade
Created Date: 2018-06-05 11:28:02
Close Date: 2018-06-01 00:00:00
- Grand Hotels Kitchen Generator · Id. Decision Makers**
Amount: \$ 15000
Forecast: Pipeline
Type: Existing Customer - Upgrade
Created Date: 2018-06-05 11:28:02
Close Date: 2018-02-21 00:00:00

Open Cases (5)

- 00001028 · Working · Low · ESCALATED**
Type: Electrical
Origin: Web
Reason: Breakdown
Created Date: 2018-08-09 13:18:54
Created By: Denny Chandra
- 00001027 · New · Medium**
Type: Structural
Origin: Phone
Reason: Performance
Created Date: 2018-08-09 13:09:30
Created By: Denny Chandra

Closed Cases (3)

- 00001029 · Medium**
Type: Mechanical
Created Date: 2018-08-09 13:19:16
Reason: Performance
Closed Date: 2018-08-09 13:19:16
- 00001026 · Medium · ESCALATED**
Type: Mechanical
Created Date: 2018-08-09 01:07:48
Reason: Feedback
Closed Date: 2018-08-09 01:07:59

ACTIVITY

New Task: Log a Call | New Event | Email

Create a task... **Add**

Filters: All time · All activities · All types

Next Steps

- Call **15/08**
You have an upcoming Task with [John Bond](#)

Past Activities

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

[Load More Past Activities](#)

Step 1 - Create CMTD records using Target API Name



Related List Name = OpenCases

This example is an extension from the “Different Fields” example (Related List Name = OpenCases)

Create additional record:

Name	Label	Related List Name	Field API Name	Header	Order	UI Type Override	Colour	Target API Name
OpenCases_CreatedBy	Created By	OpenCases	CreatedById.Name		17			CreatedById

Note:

- CreatedById (Standard Salesforce field that contain the user record Id)

Step 1 - Create CMTD records using Target API Name



Related List Name = OpenCases

Screenshot of the OpenCases CMT records after creating the additional records.

Enhanced Related List Help for this Page ?

View **Open Cases** Edit | Create New View

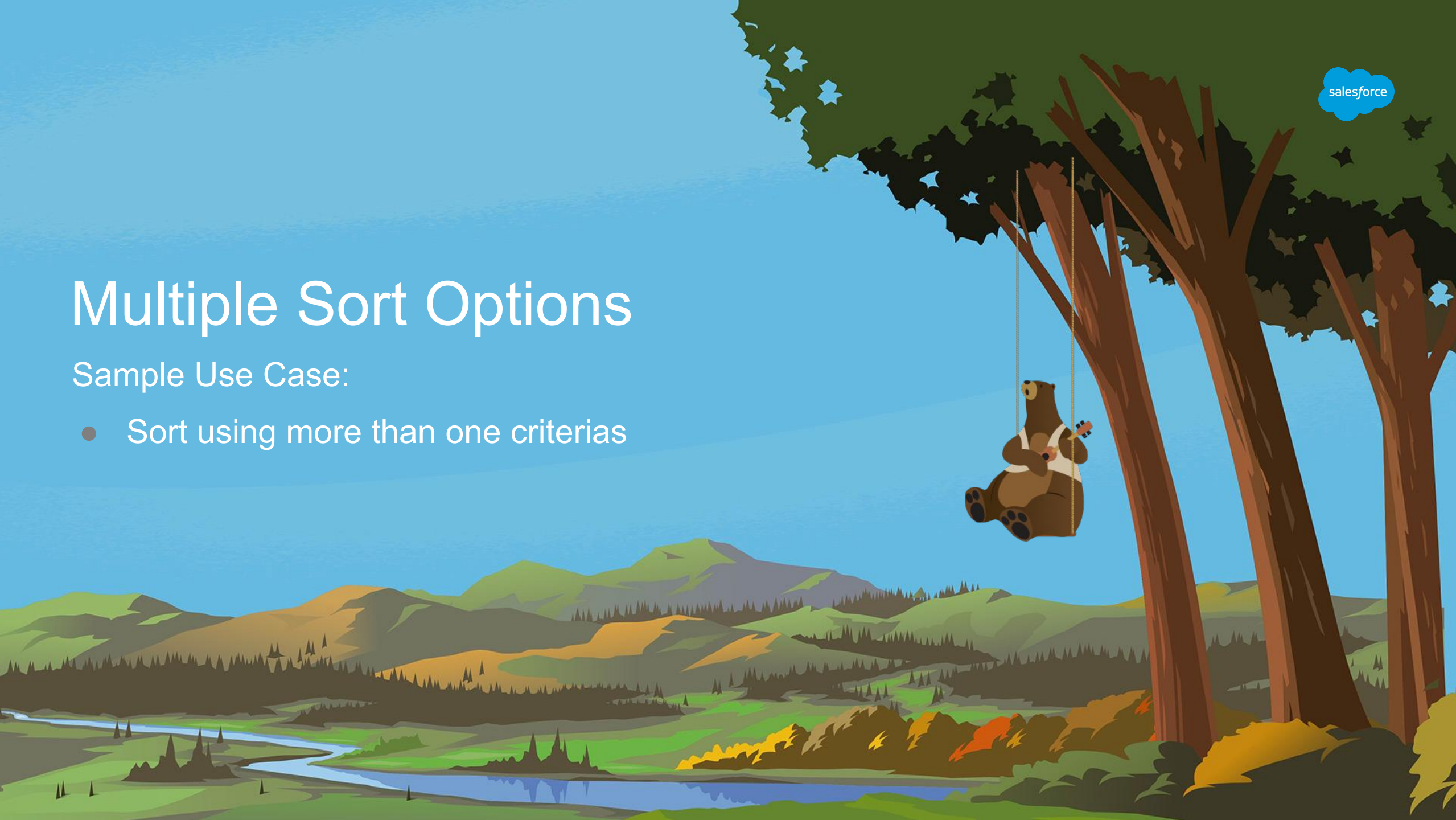
New

Action	Enhanced Related List Name	Label	Related List Name	Field API Name	Header	Order ↑	UI Type Override	Colour	Target API Name
Edit Del	OpenCases_CaseNumber	<u>Case Number</u>	OpenCases	CaseNumber	<input checked="" type="checkbox"/>	1			Id
Edit Del	OpenCases_Status	<u>Status</u>	OpenCases	Status	<input checked="" type="checkbox"/>	2			
Edit Del	OpenCases_Priority	<u>Priority</u>	OpenCases	Priority	<input checked="" type="checkbox"/>	3			
Edit Del	OpenCases_Escalated	<u>Escalated</u>	OpenCases	Escalated_Flag_F__c	<input checked="" type="checkbox"/>	6	Badge	FF7F50	
Edit Del	OpenCases_SLAViolated	<u>SLA Violated</u>	OpenCases	SLA_Violation_Flag_F__c	<input checked="" type="checkbox"/>	7	Badge	FF0000	
Edit Del	OpenCases_Type	<u>Type</u>	OpenCases	Type	<input type="checkbox"/>	10			
Edit Del	OpenCases_Origin	<u>Origin</u>	OpenCases	Origin	<input type="checkbox"/>	11			
Edit Del	OpenCases_Reason	<u>Reason</u>	OpenCases	Reason	<input type="checkbox"/>	15			
Edit Del	OpenCases_CreatedDate	<u>Created Date</u>	OpenCases	CreatedDate	<input type="checkbox"/>	16			
Edit Del	OpenCases_CreatedBy	<u>Created By</u>	OpenCases	CreatedById.Name	<input type="checkbox"/>	17			CreatedById

Multiple Sort Options

Sample Use Case:

- Sort using more than one criterias



Preview



Account: **Grand Hotels & Resorts Ltd**

Type: Customer - Direct | Phone: (312) 596-1000 | Website: www.grandhotels.com | Account Owner: Denny Chandra | Account Site: | Industry: Hospitality

OPEN OPPTY | CLOSED OPPTY

Open Oppty (3)

- Grand Hotels Guest Portable Generators** - Value Proposition
Amount: \$ 250000
Forecast: Pipeline
Type: Existing Customer - Upgrade
Created Date: 2018-06-05 11:28:02
Close Date: 1/6/2018
- Grand Hotels Kitchen Generator** - Id. Decision Makers
Amount: \$ 15000
Forecast: Pipeline
Type: Existing Customer - Upgrade
Created Date: 2018-06-05 11:28:02
Close Date: 21/2/2018
- Service Cleaning** - Prospecting
Amount: | Forecast: Pipeline
Type: Existing Customer - Upgrade
Created Date: 2018-08-09 14:20:54
Close Date: 15/8/2018

Web (2)

- 00001028** - Working - Low
Type: Electrical
Reason: Breakdown
Created Date: 2018-08-09 13:18:54
- 00001026** - Closed - Medium
Type: Mechanical
Reason: Feedback
Created Date: 2018-08-09 01:07:48

Email (1)

- 00001007** - New - Medium
Type: Structural
Reason: Breakdown
Created Date: 2018-06-05 11:28:02

ACTIVITY | CHATTER | DETAILS

New Task | Log a Call | New Event | Email

Create a task... **Add**

Filters: All time - All activities - All types

Next Steps: **Call** (15/08) - You have an upcoming Task with **John Bond**

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

Records are sorted using Amount (NULL last) and CreatedDate field

Step 3 - Configure the Component Attributes

Open Oppty

	Open Oppty
Object API Name	Opportunity
Related List Name	OpenOppty
Parent Field	AccountId
Record Display Type	Tile 1
Fields Layout Type	1 Column
Filter	StageName!='Closed Won' AND StageName!='Closed Lost'
Sort	Amount DESC NULLS LAST, CreatedDate DESC
Title	Open Oppty
Icon Name	standard:opportunity
New Record	Standard

Syntax as per SOQL

Note: Please use sorting considerably as it will impact performance

New Record with Record Types

Sample Use Case:

- Work Order object has 2 record types
'Fault' and 'Maintenance'
- Display list of Work Orders (common) under a Case
- Record Type selection is presented on New record



Preview



The screenshot displays the Salesforce Service Console interface. At the top, there is a navigation bar with 'Service Console', 'Accounts', and 'Grand Hotels & Res...' tabs. A search bar contains 'Search Salesforce'. Below this, a breadcrumb trail shows 'Grand Hotels & Res...' and a case ID '00001027'. The main content area is divided into sections: 'Case' (Priority: Medium, Status: New, Case Number: 00001027), 'CHATTER', 'RELATED', and 'WORK ORDERS'. The 'WORK ORDERS' section is active, showing four work orders with details like subject, priority, and status. A 'Record Type Selector' dialog box is overlaid on the work orders, allowing selection of a record type (currently 'Fault'). To the right, a detailed view of the case record is shown, including fields for Case Number, Contact Name, Account Name, Type, Case Reason, Web Email, and Web Name.

Priority	Status	Case Number
Medium	New	00001027

Case Number	Priority
00000004	Maintenance - New
00000002	Fault - New
00000003	Maintenance - New
00000001	Fault - New

Field	Value
Case Number	00001027
Contact Name	John Bond
Account Name	Grand Hotels & Resorts Ltd
Type	Structural
Case Reason	Performance
Web Email	
Web Name	
Priority	Medium
Contact Phone	(312) 596-1000
Contact Email	bond_john@grandhotels.com
Case Origin	Phone
Escalated	<input type="checkbox"/>
Web Company	
Web Phone	

Step 1 - Create WorkOrders CMTD records



Related List Name = WorkOrders

Name	Label	Related List Name	Field API Name	Header	Order	UI Type Override	Colour	Target API Name
WorkOrders_WorkOrderNumber	Work Order Number	WorkOrders	WorkOrderNumber	true	1			Id
WorkOrders_RecordType	Record Type	WorkOrders	RecordTypeId.Name	true	2			
WorkOrders_Status	Status	WorkOrders	Status	true	3			
WorkOrders_Subject	Subject	WorkOrders	Subject		10			
WorkOrders_Priority	Priority	WorkOrders	Priority		11			

Step 1 - Create WorkOrders CMTD records



Related List Name = WorkOrders

Screenshot of the WorkOrders CMT records after creating the additional records.

Enhanced Related List Help for this Page ?

View: Work Orders [Edit](#) | [Create New View](#)

[New](#)

Action	Enhanced Related List Name	Label	Related List Name	Field API Name	Header	Order ↑	UI Type Override	Colour	Target API Name
Edit Del	WorkOrders_WorkOrderNumber	<u>Work Order Number</u>	WorkOrders	WorkOrderNumber	<input checked="" type="checkbox"/>	1			Id
Edit Del	WorkOrders_RecordType	<u>Record Type</u>	WorkOrders	RecordTypeId.Name	<input checked="" type="checkbox"/>	2			
Edit Del	WorkOrders_Status	<u>Status</u>	WorkOrders	Status	<input checked="" type="checkbox"/>	3			
Edit Del	WorkOrders_Subject	<u>Subject</u>	WorkOrders	Subject	<input type="checkbox"/>	10			
Edit Del	WorkOrders_Priority	<u>Priority</u>	WorkOrders	Priority	<input type="checkbox"/>	11			

Step 2 - App Builder

Drag a components for the Work Order



Lightning App Builder Pages Case Record Page Back Help

Desktop Shrink To View Refresh Save Activation...

Lightning Components

cmtd

- Standard (0)
- Custom (0)
- Custom - Managed (1)
 - CMTD Enhanced Related List

Case

Priority	Status	Case Number
Medium	New	00001027

CHATTER RELATED WORK ORDERS

Work Orders (4)

Subject	Priority	Subject	Priority
00000004 - Maintenance - New Major part replacement Medium	Medium	00000003 - Maintenance - New Require Asset Maintenance Critical	Critical
00000002 - Fault - New Machine Fault Medium	Medium	00000001 - Fault - New Test Subject Low	Low

View All

Case Owner: Denny Chandra

Case Number: 00001027

Contact Name: John Bond

Account Name: Grand Hotels & Resorts Ltd

Type: Structural

Case Reason: Performance

Web Email:

Web Name:

Date/Time Opened: 9/08/2018 11:09 PM

Product:

Potential Liability:

Created By: Denny Chandra, 9/08/2018 11:09 PM

Subject:

Description:

Internal Comments:

Up-sell / Cross-sell Opportunity

Status: New

Priority: Medium

Contact Phone: (312) 596-1000

Contact Email: band_john@grandhotels.com

Case Origin: Phone

Escalated:

Web Company:

Web Phone:

Date/Time Closed:

Engineering Req Number:

SLA Violation:

Last Modified By: Denny Chandra, 9/08/2018 11:09 PM

Page > CMTD Enhanced Related List

Sort: CreatedDate DESC

Default Number of Records to Display: 4

Title: Work Orders

Icon Name: standard:work_order

New Record: StandardWithRecordType

Default Record Type:

Show Header?

Show Refresh Button?

Get more on the AppExchange

Step 3 - Configure the Component Attributes



Work Order

	Work Order
Object API Name	WorkOrder
Related List Name	WorkOrders
Parent Field	Caseld
Record Display Type	Tile 2
Fields Layout Type	1 Column
Filter	
Sort	CreatedDate DESC
Title	Work Orders
Icon Name	standard:work_order
New Record	StandardWithRecordType
Default Record Type	

Using Default Record Type

Sample Use Case:

- Work Order object has 2 record types 'Fault' and 'Maintenance'
- Group 'Fault' and 'Maintenance' Work Order under a Case
- New Record is created with the correct Record Type



Preview

Fault Work Order



Service Console Accounts Grand Hotels & Res... 00001027

Case

Priority	Status	Case Number
Medium	New	00001027

CHATTER RELATED **FAULT** MAINTENANCE

Work Orders (2)

Case ID	Subject	Priority
00000002	Machine Fault	Medium
00000001	Test Subject	Low

[View All](#)

Service Console Accounts Grand Hotels & Res... 00001027 New Work...

New Work Order: Fault

Information

Work Order Number	Owner
00001027	Denny Chandra
Status	Priority
New	Low
Parent Work Order	Contact
Search Work Orders...	Search Contacts...
Account	Asset
Search Accounts...	Search Assets...
Case	
00001027	

Description

Subject

Cancel Save & New Save

History

Case Number	00001027	Priority	Medium
Contact Name	John Bond	Contact Phone	(312) 596-1000
Account Name	Grand Hotels & Resorts Ltd	Contact Email	bond_john@grandhotels.com
Type	Structural	Case Origin	Phone
Case Reason	Performance	Escalated	<input type="checkbox"/>
Web Email		Web Company	
Web Name		Web Phone	
Date/Time Opened	9/08/2018 11:09 PM	Date/Time Closed	

Preview

Maintenance Work Order



Service Console Accounts Grand Hotels & Res... 00001027

Case

Priority	Status	Case Number
Medium	New	00001027

CHATTER RELATED FAULT MAINTENANCE

Work Orders (2)

Case Number	Subject	Priority
00000004	Major part replacement	Medium
00000003	Require Asset Maintenance	Critical

[View All](#)

Service Console Accounts Grand Hotels & Res... 00001027 New Work...

New Work Order: Maintenance

Information

Work Order Number	00001027	Owner	Denny Chandra
Status	New	Priority	Low
Parent Work Order	Search Work Orders...	Contact	Search Contacts...
Account	Search Accounts...	Asset	Search Assets...
Case	00001027		

Description

Subject

Cancel Save & New Save

Case Number	00001027	Priority	Medium
Contact Name	John Bond	Contact Phone	(312) 596-1000
Account Name	Grand Hotels & Resorts Ltd	Contact Email	bond_john@grandhotels.com
Type	Structural	Case Origin	Phone
Case Reason	Performance	Escalated	<input type="checkbox"/>
Web Email		Web Company	
Web Name		Web Phone	
Date/Time Opened	9/08/2018 11:09 PM	Date/Time Closed	

Step 1 - Create WorkOrders CMTD records

Related List Name = WorkOrders



This step is not needed as it is already done in Step 1 of “New Record with Record Types” example

Step 2 - App Builder



Drag 2 components for Fault and Maintenance Work Order

Lightning App Builder Pages Case Record Page Back Help

Desktop Shrink To View Refresh Save Activation...

Lightning Components

Search components...

Standard (25)

- Accordion
- Activities
- Chatter
- Chatter Feed
- Chatter Publisher
- Flow
- Guided Action List
- Highlights Panel
- List View
- Path
- Quip
- Recent Items
- Recommendations
- Record Detail
- Related List - Single
- Related List Quick Links
- Related Lists

Get more on the AppExchange

Case

+ Follow Edit Delete Change Owner

Priority	Status	Case Number
Medium	New	00001027

CHATTER RELATED FAULT MAINTENANCE

Work Orders (2)

Subject	Priority	Subject	Priority
00000004 · Maintenance · New Major part replacement	Medium	00000003 · Maintenance · New Require Asset Maintenance	Critical

View All

Case Owner: Denny Chandra

Case Number: 00001027

Contact Name: John Bond

Account Name: Grand Hotels & Resorts Ltd

Type: Structural

Case Reason: Performance

Web Email

Web Name

Date/Time Opened: 9/08/2018 11:09 PM

Product

Potential Liability

Created By: Denny Chandra, 9/08/2018 11:09 PM

Subject

Description

Internal Comments

Status: New

Priority: Medium

Contact Phone: (312) 596-1000

Contact Email: bond_john@grandhotels.com

Case Origin: Phone

Escalated:

Web Company

Web Phone

Date/Time Closed

Engineering Req Number

SLA Violation

Last Modified By: Denny Chandra, 9/08/2018 11:09 PM

Page > CMTD Enhanced Related List

Object API Name: WorkOrder

Related List Name: WorkOrders

Parent Field: CaseId

Records Display Type: Tile 2

Fields Layout Type: 1 Column

Filter: Record_Type_Name_F__c='Maintenance'

Sort: CreatedDate DESC



Step 3 - Configure Component Attributes

Fault and Maintenance Work Order

	Fault	Maintenance
Object API Name	WorkOrder	WorkOrder
Related List Name	WorkOrders	WorkOrders
Parent Field	Caseld	Caseld
Record Display Type	Tile 2	Tile 2
Fields Layout Type	1 Column	1 Column
Filter	RecordType.Name='Fault'	RecordType.Name='Maintenance'
Sort	CreatedDate DESC	CreatedDate DESC
Title	Fault Work Orders	Maintenance Work Orders
Icon Name	standard:work_order	standard:work_order
New Record	Standard	Standard
Default Record Type	Fault	Maintenance

Syntax as per SOQL

THANK YOU

