

PWR Components User Guide

By Orektic Solutions LLP





Contents

I	Intro	oduction	2
	1.1	Orektic Solutions LLP	2
	1.11	Enzigma LLC	2
II	Proc	duct Introduction	3
ш	Proc	duct Features	4
IV	Proc	duct Versions	5
v	Con	figuration Guide	6
	V.I	Installation Steps	6
	V.II	Pre-requisites	7
	V.III	Step by Step Walk through	8
		V.III.1 PWR Button Group	8
		V.III.2 PWR Icon:	
		V.III.3 <mark>PW</mark> R Progress Bar:	38
		V.III.4 PWR Rating:	53
		V.III.5 PWR Related List: Solutions to socie your business · · · · · · ·	68
		V.III.6 PWR Timeline	
	V.IV	Steps To Configure the PWR Components on the Record Page, Home Page, and	
		Flows:	98

VI Contact Us

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Introduction

I.I Orektic Solutions LLP

Orektic Solutions LLP is known for state-of-the-art cloud-based, SAAS solutions that help our clients to transform the way they do their business.

We exist to solve the critical issues facing our clients, both large and small. Our unique approach is not only what differentiates us, but also what makes us successful. We provide a broad range of services and solutions to help organizations facilitate change, achieve their vision, and optimize performance and productivity.

From implementing new business strategies to ultra-efficient work processes, Orektic Solutions is ready to tackle any challenge and put you on the path to success. With state-of-the-art cloud-based, SAAS solutions transform the way you do business.

Orektic is a sister concern of Enzigma Software, a pioneer company in the Salesforce ecosystem for almost 20+ years.

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I.II Enzigma LLC

Enzigma LLC is the exclusive reseller of Orektic products



Solutions to scale your busines



I Product Introduction

With our innovative thoughts, we have our new innovative product launched on AppExchange, which is an added advantage for all the Salesforce admins and developers, which enables them with drag and drop-able Lightning Web Components that can be used on the following pages:

- Home page
- App page
- Record details page
- Lightning flows
- Communities

To enhance usability and reduce the time to market for custom requirements. We all know Salesforce Lightning is the new world and classic deprecating soon. Due to many limitations and restrictions, which increase time to market and budgets. Lack of configuration and custom development results in slow adoption for Salesforce. To keep the time to market and budget at a minimum, with the ease of configuration, PWR Components can be the perfect fit.

PWR Components is not just a bundle to extend Salesforce limitations but also helps users to configure and use our new and innovative components which are totally new in the ecosystem.

- PWR Button Group
- PWR Icons
- PWR Progress Bar
- PWR Ratings
- PWR Related List
- PWR Timeline

The above components provide more power to the admins, and developers to format data in a specific format as per the requirements.

All components in the bundle are supported on the Record Page, Home Page, App Page, Lightning Flows, and Communities

It helps Reduce Cost and Time to Production.



III * Product Features

1. PWR Button Group:

- PWR Button is used for calling any actions on the Lightning UI. PWR Buttons can be placed anywhere on the Lightning Pages
- It looks like the button group in Salesforce. The advantage of using PWR Buttons is that they can be placed anywhere on the Pages so it is easily accessible

2. PWR lcon:

• With the help of Icons users can show their data in a pictorial format or in the icon format

3. PWR Progress Bar:

- PWR Progress Bar component helps salesforce users to get a graphical representation to show the progress of the work
- PWR Progress Bar can be configured to show/hide the Percentage of the progress, on hovering over the component it shows the current percentage.

4. PWR Rating:

- The PWR Rating component is used for rating purposes. With the help of the PWR Rating component, users can give ratings in different categories
- We provide the Rating component to give feedback and provide the feature to change the appearance of the stars or the way the ratings are displayed

5. PWR Related List:

- Solutions to scale your business
- With the help of a related list, we can show the related data of objects and we can show the data up to 5 the level hierarchy
- · We can add more than 10 fields to the related list and so on

6. PWR Timeline:

- · We can show the timeline view for all the objects
- The Timeline helps users view the activity Timeline for all configured objects. We can observe the activity timeline accordingly
- The filtered format and many more functionalities are available in the timeline



IV Product Versions

Version	Release Date	Description
PWR Components 3.8/3.8.3	04/24/2024	We have added new features in the button group
PWR Components 3.5/3.5.21	02/20/2024	We have added new features of the Summarize field and period component in filter
PWR Components 3.4/3.4.5	10/31/2023	We have introduced the components: Button Group, Icon, Progress Bar, Rating, Related List, Timeline
PWR Components 1.9/1.9.3	11/26/2021	First release





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V Configuration Guide

V.I Installation Steps

To install PWR Components managed package do follow the mentioned steps here:

- 1. To install PWR Components click here
- 2. The link will direct you to the PWR Commons application page, it is a prerequisite package for PWR Components
- 3. Click on Get it now from the apps information page
- 4. Enter the credentials for the org in which you want to install and log in
- 5. Choose to install the package in either the production org or Sandbox by clicking "Install in Production" or "Install in Sandbox"
- 6. Tick the checkbox indicating your agreement with the terms and conditions, then proceed by clicking on the "Confirm and Install" button
- 7. Select the desired installation option (Install for All Users, Install for Admins Only, or Install for Specific Profiles), and click "Install"
- 8. Click "Done" once the installation is complete
- 9. It may take some time to complete the installation package. You will be notified through Email once the installation is completed
- 10. Now open the PWR Commons application from the application manager
- 11. Click "Install Now" in front of the PWR Components application in the list of products
- 12. Enter the credentials of the logged-in organization and log in
- 13. Select the desired installation option, and click "Install"
- 14. Click on Done once the installation is completed
- 15. It may take some time to complete the installation package. You will receive an email notification when the installation is finished

** For reference and more details about package installation, please click here

Any potential customer with a package link for PWR Components from the support or sales team, then to install PWR Components managed package do follow the mentioned steps here:

- 1. Open the installation URL received from our sales or support team in the browser.
- 2. Enter your credentials for the Salesforce organization in which you want to install the package and then click on **Log In**.
- 3. Repeat the steps as mentioned above from step 5.

V.II[®] Pre-requisites

As a prerequisite, the Salesforce admin needs to make sure that the Salesforce org is already set up with their domain name.

In case your org is not set up with the Domain Name then the contents of the Package will not be available for use. To enable the domain name open Setup from the Quick Find box, find "My Domain" and Set up a Domain Name for your org. For more details and information, please <u>click here</u>







V.III Step by Step Walk through

V.III.1 PWR Button Group

• Introduction:

PWR Button is used for calling any actions on the Lightning UI. PWR Buttons can be placed anywhere on the Lightning Pages. It looks like the button group in Salesforce. The advantage of using PWR Buttons is that they can be placed anywhere on the Pages, making it easily accessible.



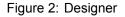
Figure 1: PWR Button Group

PWR Button supports no of Actions like Quick Actions, Global Actions, Redirect, and many more. All the actions are supported on the Home Page, App Page, Record Page, flows, and Community pages as well.

Steps to create Button Group config:

- Go to the designer tab

© ₽ <mark>₿</mark> ₽	Q Search	
PWR Components	Designer	
Component C Select Component	Designer	





- Select PWR Button Group component from the list of components

₽ <mark>₿</mark> ₽		Q Search	
PWR Componer	nts Designer		
PWR Component Component Select Componen		AGUL NNNNSJHIU⊂ JESSEJAC. ▼	<i>////:</i> ∽.\(C / \\\\\\\/////////////////////////////
Button Group	2		
Progress Bar Rating			
Rating			

Figure 3: Select Component

- Users can use existing Config, or users can create a new Config

		**) H 🚓 ? 1	¢ 🌲 💿
THE SUCTONNET DE	Config 🚺	Select Existing Config	Create	e New Config
•	Search Config		Q	+ 💼
	University Actions New Student New Action New Contact			500

Figure 4: Select Config



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- If the user creates a new config

	Search Config	×
	New Config	
*Label	*Name	
New Opportunity	New_Opportunity	
* Page Type	* Object Name	
Record Page	 Opportunity 	•

Figure 5: Create Config

- * Label: Here user can set the title for the config of the component
- * Name: The API name of the label is shown here
- * **Page Type:** Here user can select page type as record page or non-record page; depending on which page the user wants to show the component
 - Non-Record Page: By choosing the non-record page user can use this config on the home page and app page
 - Record Page: By choosing the record page user can use this config on a related record object
- * **Object Name:** Here user can choose any object on which that created config will be shown



Here are the details around different attributes, and which valid information can be input for the same.

Attributes

Attributes		
Record Object	• •	
Account		•
*Buttons)	
•		
Label :	New Account	
Label :	New Contact	
Label :	Edit Account	•
Label :	New Lead	
Overflow Afte	r 🚯	
3		

Figure 6: Configuration Section

- Record Object: The object name is auto-populated here as you select the object at the time of config creation
- Buttons: Here user can add multiple buttons
- Button Type: Here user can select the type of button to configure; by default button type is selected
 - * Button Here user can add buttons to configure actions
 - * **Header** Providing a distinct title or label for the button group facilitates the categorization of buttons
 - * **Separator** Visual element creating a visible division between buttons, enhancing clarity and categorization within the group
 - * **Submenu** Secondary buttons nested within the main button group, offering additional options or actions related to the primary buttons
 - * Label: The label is displayed on the button
 - · Name: The name attribute specifies the name for the Button
 - $\cdot\,$ Icon: You can add the icon to the button

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· Left Icon: Displays the icon on the left side of the action label

 $\cdot\,$ Right lcon: Displays the icon on the right side of the action label

nts Designer		×
	New Action	
*Label Edit Account Left Icon	*Name C Edit_Account Right Icon C	
Variant 0 Neutral	*Action *Type *Type Edit *Record Id Record Field>Account ID	
Visible O Criteria Type	Disable Criteria Type	-
	Cancel Add	

Figure 7: New Button Creation

- * Variant: Allows to show Buttons in different color formats
 - Neutral: Neutral is the default variant of the Button which is displayed in white color
 - Brand: Brand is a blue Button, used to draw attention to the primary action on a page
 - · Outline-brand: Outline-brand is like the brand variant, but the color is used for the label and border only, not the Button color
 - Destructive: Destructive is a red Button used to warn that the action has a negative effect
 - $\cdot\,$ Success: Success is a green Button used to indicate a successful action
 - Text Destructive: This button is used to indicate a destructive action to the user





* Action: User can create the actions here. For example, creating new records, navigating to any URL, editing any record, etc

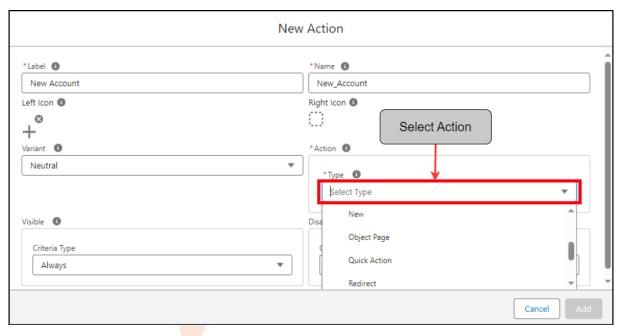


Figure 8: Select Action

• Type: Here user can select any specific type for that particular action

• Edit: This Action is a feature that allows a user to create a Button for Editing or Modifying an existing Record in the system. The process involves the following steps:

- 1. The user fills out the necessary fields such as Label and Name
- 2. The user selects 'Edit' from the Action Type picklist
- 3. The user has to provide the Record ID of the Record that needs to be edited or modified. This ID can be passed through various methods such as Custom Metadata, Custom Setting, Record Field, or Static which can be selected by the User from the Picklist named as 'Value Source' which appears after the Selection of Action Type
- 4. Once these steps are completed, the button is created. When clicked, this button fetches the corresponding record using the provided ID and allows the user to make changes to it
- **New:** This Action is a feature that allows a user to create a Button for generating a New Record for a specific Object in the system. The process involves the following steps:
 - 1. The user fills out the necessary fields such as Label and Name
 - 2. The user selects 'New' from the Action Type picklist



- 3. The user Selects the name of the Object for which a new Record needs to be created from the Object Picklist which has appeared after choosing the Action type as 'New'
- 4. Once these steps are completed, the button is created. When clicked, this button initiates the process of creating a new record for the specified object.
- **View:** This Action is a feature that allows a user to create a button for viewing an existing record in the system. The process involves the following steps:
 - 1. The user fills out the necessary fields such as Label and Name
 - 2. The user selects 'View' from the Action Type picklist
 - 3. The user has to provide the Record ID of the Record that needs to be Viewed. This ID can be passed through various methods such as Custom Metadata, Custom Setting, Record Field, or Static which can be selected by the User from the Picklist named as 'Value Source' which appears after the Selection of Action Type
 - 4. Once these steps are completed, the button is created. When clicked, this button fetches the corresponding record using the provided ID and allows the user to view it
- **Delete:** This Action is a feature that allows a user to create a button for Deleting an existing record in the system. The process involves the following steps:
 - 1. The user fills out the necessary fields such as Label and Name
 - 2. The user selects 'Delete' from the Action Type picklist
 - 3. The user must provide the Record ID of the Record that needs to be Deleted. This ID can be passed through various methods such as Custom Metadata, Custom Setting, Record Field, or Static which can be selected by the User from the Picklist named as 'Value Source' which appears after the Selection of Action Type
 - Once these steps are completed, the button is created. When clicked, this button fetches the corresponding record using the provided ID and Deletes it from the system
- **Redirect:** This Action is a feature that allows a user to create a button for Redirecting to a different website or page. The process involves the following steps:
 - 1. The user fills out the necessary fields such as Label and Name
 - 2. The user selects 'Redirect' from the Action Type picklist
 - 3. The user provides the URL of the website or page to which they want to Redirect. This can be done by entering or pasting the URL in the designated field, which appears after the Selection Action Type
 - 4. If needed, the user can add custom parameters by clicking on 'Add parameters', which helps to Redirect to a specific Page on the Website,



is Redirected

5. Once these steps are completed, the button is created. When clicked, this button Redirects the user to the specified URL

• **Global Action:** This Action is a feature that allows a user to create a button for executing an existing Global Action in the system. The process involves the following steps:

- 1. The user fills out the necessary fields such as Label and Name
- 2. The user selects 'Global Action' from the Action Type picklist
- 3. The user Selects the name of the Global Actions which is to be used or executed, from Picklist which has appeared after choosing the action type as 'Global Action'
- 4. Once these steps are completed, the button is created. When clicked, this button executes the specified Global Action. This functionality ensures a streamlined process for utilizing existing Global Actions within the system
- **Quick Action:** This Action is a feature that allows a user to create a button for executing an existing Quick Action related to a specific Object in the system. The process involves the following steps:
 - 1. The user fills out the necessary fields such as Label and Name
 - 2. The user selects 'Quick Actions' from the Action Type picklist
 - 3. The user selects the name of the Object from the picklist whose Quick Action is to be executed
 - 4. After selecting the Object, the user then selects the specific Quick Action of that object which is to be executed from the picklist that appears
 - 5. Once these steps are completed, the button is created. When clicked, this button executes the specified Quick Action related to the chosen Object. This functionality ensures a streamlined process for utilizing existing Quick Actions within the system
- **List View:** This Action is a feature that allows a user to create a button for redirecting/ Opening a List View of an Object in the system, on the new Tab/Page. The process involves the following steps:
 - 1. The user fills out the necessary fields such as Label and Name
 - 2. The user selects 'List View' from the Action Type picklist
 - 3. The user provides the name of the Object related to the List View that needs to be displayed. This can be done by selecting the desired Object from the picklist
 - 4. After selecting the object, the user has to provide the Record ID of the List View in the Filter Name field for that Object's List View. The default filter is 'Recent', but users can select other filters from options such as Custom Metadata, Custom Setting, Record Field, or Static



5. Once these steps are completed, the button is created. When clicked, this button redirects the user to the specified List View related to the chosen Object with the selected filter applied

• **Tab:** This action is a feature that allows a user to create a button for redirecting to a specific Tab related to an Object in the system. The process involves the following steps:

- 1. The user fills out the necessary fields such as Label and Name
- 2. The user selects 'Tab' from the Action Type picklist
- 3. The user provides the name of the Object whose Tab needs to be displayed. This can be done by selecting the desired Object from the picklist
- 4. Once these steps are completed, the button is created. When clicked, this button redirects the user to the specified Tab related to the chosen Object
- Object Page: This action is a feature that allows a user to create a button for redirecting to a specific Object Page related to an object in the system, on the same Page/Tab where the button is located. The process involves the following steps:
 - 1. The user fills out the necessary fields such as Label and Name
 - 2. The user selects 'Object Page' from the Action Type picklist
 - The user provides the name of the object whose Object Page needs to be displayed. This can be done by selecting the desired object from the picklist
 - 4. Once these steps are completed, the button is created. When clicked, this button redirects the user to the specified Object Page related to the chosen object. This functionality ensures a streamlined process for navigating and viewing specific sections of the system
- Custom Component: This action is a feature that allows a user to create a button for opening or redirecting to a Custom Component present in the system. The custom component could be a Visualforce Component, Lightning Component, etc. The process involves the following steps:
 - 1. The user fills out the necessary fields such as Label and Name
 - 2. The user selects 'Custom Components' from the Action Type picklist
 - 3. The user provides the name of the Custom Component that needs to be opened or redirected to. This can be done by entering the name of the Custom Component in the designated field
 - 4. Once these steps are completed, the button is created. When clicked, this button opens or redirects the user to the specified Custom Component. This functionality ensures a streamlined process for navigating and accessing specific custom components within the system.

· Visible:

/ariant	*Action (1)	
Neutral	*Type 1	
	Edit	•
Select Visibility Type	* Record Id Record Field>Account>Account ID	\$X
/isible ①	Disable 🔘	
Criteria Type	Criteria Type	
	▼	*
Always		
Never		
Conditional		

Figure 9: Select Visibility Type

- Never: The button is hidden
- · Always: The button is always visible
- · Conditional: Conditional visibility specifies when a Button is visible
- · Disable:

	New Action
Variant () Neutral	Action Action Little
Visible ① Criteria Type	* Record Id Record Field > Acc Select Disability Disable O Criteria Type
Always	Always Never
	Conditional Cancel Add

Figure 10: Select Disability Type

· Never: The button is visible



- · Always: The button is always disabled
- · Conditional: Conditional disability specifies when a Button is disabled
- * Overflow After:

Overflow After 🚯			
3			
Alignment 🕕			
Right	•		
Default Variant 🕕			
Neutral	•		
Padding Location 🕕			
Select Padding Location	•		

Figure 11: Overflow After

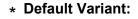
It is a numerical value that determines the number of buttons to be displayed on the page and the number to be displayed in the dropdown. For example, if 'Overflow After' is set to 3, then 3 buttons are displayed on the page and the remaining buttons are displayed in the dropdown

* Alignment:

Overflow After 🕕	
3	
Alignment 🕦	
Select Alignment	•
Center	
Left	
Right	
Margin Location 🚯	
Select Margin Location	Ψ.

Figure 12: Select Alignment

Here user can select alignment if the buttons



Alignment 🕕	
Select Alignment	•
Default Variant 🕕 🗸	
Select Default Variant	•
Brand	▲
Destructive	
Neutral	•
Outline Brand	-

Figure 13: Select Varient

Here user can select the default variant

* Padding Location:

Defines the position of the padding for a component. The padding creates extra space within a component.

Default Variant 🚯	
Neutral	•
Padding Location 🕚 😽	
Select Padding Location	•
Around	î
Bottom	
Horizontal	
Left	-

Figure 14: Select Padding Location

- $\cdot\,$ Around: Creates padding around the component
- $\cdot\,$ Top: Creates padding at the top of the component
- $\cdot\,$ Left: Creates padding at the left side of the component
- $\cdot\,$ Bottom: Creates padding at the bottom of the component
- $\cdot\,$ Right: Creates padding at the right side of the component
- · Horizontal: Creates padding horizontally



- Vertical: Creates padding vertically
- * Padding Size: The padding size of the component can be set to:

Padding Location 🕕	
Around	•
Padding Size 🕕 🕚	7
Select Padding Size	Ψ
Small	*
Medium	
Large	
X Large	



- · None
- · xxx-small
- xx-small
- · x-small
- · Small
- · Medium
- · Large
- · x-large
- * **Margin Location:** Defines the position of the margin for a component. margin creates extra space around a component.

	Padding Size 🕕	
	Small	•
	Margin Location 🕚 🔶	
	Select Margin Location	Ψ
_	Bottom	
	Horizontal	
	Left	
	Right	-

Figure 16: Select Margin Location



- \cdot Around: Creates padding around the component
- $\cdot\,$ Top: Creates padding at the top of the component
- $\cdot\,$ Left: Creates padding at the left side of the component
- $\cdot\,$ Bottom: Creates padding at the bottom of the component
- · Right: Creates padding at the right side of the component
- · Horizontal: Creates padding horizontally
- · Vertical: Creates padding vertically
- * Margin Size: The margin size of the view can be set to:

Margin Location 🚯
Bottom 💌
Margin Size 🗊 🗸
Select Margin Size 🔹
Small
Medium
Large
X Large
Figure 17: Select Margin Size
None Solutions to scale your business
· xxx-small
· xx-small
· x-small
· Small
· Medium
· Large
· x-large

After clicking on the Save button the config will get saved on the component config object and the user can view this button on the Record page, App page, Home Page, Flows, and Community.

- Preview Section:

After the user has selected and filled the fields according to their requirements, they can preview the components in the Preview section before saving them on the Record Page, App Page, Flows, and Community Page.

PBR	Q Search		** 🖬 🚓 ? 🌣 🐥 🚫
PWR Components Designer			/
PWR Component Designer Component Button Group		Config New Action	×) +) ê
Preview	11) - 21 V - XO JAZAN ZAU - 21	A	Attributes
- Teview			
C New Account 2 New Contact	🖍 Edit Account 🛛 🛋 New Lead		Record Object Account
			*Buttons 💿
			•
			Label : New Account
			Label : New Contact
			Label : Edit Account
			Label : New Lead
			Overflow After
			4
	Figure 18: Pres		
* PWR Butte	on Group on Home Page		
* PWR Butte	on Group on Home Page	e: kt	Assistant
* PWR Butte	Froup screenshots: on Group on Home Page	e: kt	Assistant Ceptortunity is overdue
* PWR Butte	Froup screenshots: on Group on Home Page	e: kt	Assistant
* PWR Butte	aroup screenshots: on Group on Home Page Q Search V Contacts V Cases V Reports V Dasi at Account V Leve Level	e: kt	Assistant Copportunity is overdue
* PWR Butte	aroup screenshots: on Group on Home Page Q Search V Contacts V Cases V Reports V Dasi at Account V Leve Level	e: kt	Assistant Copportunity is overdue
* PWR Butte	aroup screenshots: on Group on Home Page Q Search V Contacts V Cases V Reports V Dasi at Account V Leve Level	e: Kt	Assistant Opportunity is overdue Edge Emergency Generator
* PWR Butte	aroup screenshots: on Group on Home Page Q Search V Contacts V Cases V Reports V Dasi at Account V Leve Level	e: Kt	Assistant Copportunity is overdue Code Emergency Generator Recent Records
* PWR Butte	aroup screenshots: on Group on Home Page Q Search V Contacts V Cases V Reports V Dasi at Account V Leve Level	e: Kt	Assistant Corportunity is overdue Code Emergency Generator Recent Records Perry Landstone Communications
* PWR Butte	aroup screenshots: on Group on Home Page Q Search V Contacts V Cases V Reports V Dasi at Account V Leve Level	e: Kt	Assistant Copportunity is overdue Code Emergency Generator Recent Records
* PWR Butte	aroup screenshots: on Group on Home Page Q Search V Contacts V Cases V Reports V Dasi at Account V Leve Level	e: Kt	Assistant Corportunity is overdue Code Emergency Generator Recent Records Perry Landstone Communications
PWR Butte Service Home Chatter Accounts New Account New Account New Contact Ed Quarterly Performance CLOSED ₹18,20,000 OPEN (>70%) ₹2,70,000 2.54 154 154	Condension on Home Page	e: Kt	Assistant Corportunity is overdue Corportunity is overdue Edge Emergency Generator Recent Records Perry Landstone Communications Corporations Corpor

Figure 19: PWR Button Group on Home Page

Duringtion fextures Corp of America Memory Corp Account Conner Account Site Industry Type Phone (336) 222-7000 Website Account Owner New York Apparel Related Details Account Image: Corp of America Rating Image: Corp of America Rating Image: Corp of America Refresh - Expand All - View Account Name Phone Gais (222-7000 Phone Image: Corp of America Gais (222-7000 Image: Corp of America Or-Dec or Corp. Parent Account Image: Corp of America Image: Corp. Image: Corp. Image: Corp. Image: Corp. Image: Corp. Parent Account Image: Corp. Image	Service Home Chatter Accounts	Q Sear		ooards 🗸		★▼ 日 ☆ ? ☆ ♣ 《
Customer - Direct (336) 222-7000 www.burlington.com Purc release New York Apparel		erica 🔝				+ Follow New Contact New Case New Note V
Related Details Account Owner Rating \overrightarrow{o} pwrc release \overrightarrow{v} Account Name Phone Burlington Textiles Corp of America (336) 222-7000 Parent Account Fax (336) 222-000 (336) 222-000	// -					
Related Details Account Owner Rating Processe Image: Composition of America Burlington Textiles Corp of America (336) 222-7000 Parent Account Fax (336) 222-8000	C New Account S New Contect				_	
Account Owner Rating Refresh - Expand All - View © pwc release Warm Phone Account Name Phone Qiash 222-7000 Parent Account Fax (336) 222-8000		Edit Account	New Lead			Activity Chatter
© pwrc release Warm Account Name Phone Burlington Textiles Corp of America (336) 222-7000 Parent Account Fax (336) 222-8000 You have an upcoming task with Ben Louis		Edit Account	New Lead		_	
Account Name Phone Burlington Textiles Corp of America (336) 222-7000 / Call 07-Dec Parent Account Fax (336) 222-8000 / Vou have an upcoming task with Ben Louis	Related Details				_	
(336) 222-8000	Related Details	Rating			_	Filters: All time • All activities • All types Refresh • Expand All • View J
Account Number Vebsite > 🗎 Email 2:00 PM Today	Related Details Account Owner Details Account Name	Rating			-	Filters: All time • All activities • All types
	Related Details Account Owner C pwrc release Account Name Burlington Textiles Corp of America	Aating Warm (336) Fax	222-7000		/	Filters: All time • All activities • All types Filters: All time • All activities • All types Refresh • Expand All • View J Upcoming & Overdue > 😭 Call 07-Dec (V)
Account Site Ticker Symbol	Related Details Account Owner The provide the second terms of	Rating Warm Phone Fax (336) Websi Websi	222-7000 222-8000 te burlington.com		/	Filters: All time + All activities + All types Filters: All time + All activities + All types Refresh + Expand All + View J V Upcoming & Overdue Call 07-Dec You have an upcoming task with <u>Ben Louis</u>

Figure 20: PWR Button Group on Record Page





V.III.2 PWR Icon:

- Introduction:

The Icon is a symbolic image that helps users quickly and easily identify the content. There are various types of categories in Icons. In that category, the user can select one icon.

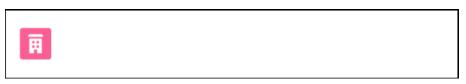


Figure 21: PWR Icon

- Steps to create icon config:

* Go to the designer tab

© ₽ [₫] R	Q Search	
PWR Components Desig	ner	
PWR Component Designe Component Component Select Component	9779777777888777888777889778777777789777777	▼

Figure 22: Designer

* Select the Icon component from the list of components

₽ d R	Q Search	
PWR Components Designer		
PWR Component Designer	NOMME DISSICTION STORES (DIMEDISSICTION)	
Select Component Button Group	•	
Icon		
Progress Bar		
Rating	*	
Figure 23: Se	lect Component	

		* 🖬 🚓 ? 🌣 🐥 🐻
//~~	Config	Create New Config
	Search Config	Q + 💼
	Company Type Case Format Opportunity Status Account Type	

* Users can use existing Config, or users can create a new Config

Figure 24: Select Config

* If the user creates a new config

	New	Config	
*Label		*Name	
Account Type		Account_Type	
* Page Type		* Object Name	
Record Page	•	Account	•

Figure 25: Create Config

- · Label: Here user can set the title for the config of the component
- · Name: The API name of the label is shown here
- **Page Type:** Here user can select page type as record page or non-record page; depending on which page the user wants to show the component



- Non-Record Page: By choosing the non-record page user can use this config on the home page and app page
- Record Page: By choosing the record page user can use this config on a related record object
- **Object Name:** Here user can choose any object on which that created config will be shown

Here are the details around different attributes, and which valid information can be input for the same.

- Attributes:

- * **Record Object:** The object name is auto-populated here as you select the object at the time of config creation
- * **Record To Preview:** This feature helps you preview and evaluate the icon's appearance according to the selected record

Attributes	
Record Object 🚯	
Account	
Record To Preview 🚯	
Select Record To Preview	٩
Perry Landstone Communications	
Burlington Textiles Corp of America	
Sample Account for Entitlements	
sForce	
GenePoint	
Is Read Only	
	ŵ
Padding Location 🚯	
Select Padding Location	•

Figure 26: Record To Preview

* Select Icon: Here user can select the icon, click on the gearbox (icon configuration)

Attributes	
Record Object 🚯	
Account	-
Record To Preview 🕚	
Burlington Textiles Corp of America	×
Select Icon 🚯	→ \$

Figure 27: Icon Configuration

• Value Source: Here user can select a value source to select an icon and by default value source selected is static

		Attributes
	Select Icon Configuration	
* Value Source 🕚 🔻		
Static		▼ 🛛 iew
Custom Metadata		_ Fex
Custom Setting		
Record Field		
✓ Static		
		Cancel Save 0

Figure 28: Value Source Configuration

- **Value Type:** This is a read-only field that shows the data type of the field for the icon
- \cdot Value: Here user can select the icon and the selected icon will display here

			Attributes X
	Select Icon Configuration		G
* Value Source 🚯			iew Fext
Static			,
* Value Type			m}
Value			/
			_
		Cancel	Save
			on

Figure 29: Value Configuration

* **Categories**: Here user can select a category for the icon, click on the gearbox (icon configuration)

Account	*
Record To Preview 🕚	
Burlington Textiles Corp of America	×
Select Icon 🚯	
Static>{custom}:{custom63}:{large} (lcon)	$\infty \times$

Figure 30: Categories Configuration

• Value Source: Here user can select a value source for Category and by default value source selected is static

		Config 🚯		Х
	Categories Configuration			
* Value Source 🚯 🔻				î
Static			•	0
Custom Metadata			^	
Custom Setting				iew
Record Field				Texti
✓ Static				∽ m}:
		Cancel	Save	
			Sizes U	

Figure 31: Value Source Configuration

- Value Type: This is a read-only field that shows the data type of field for the category
- Value: Here user can select the category and the selected category will display here

Solutions to scale your business



			Attributes 🗙
	Categories Configuration		0
* Value 🚯			- iew
Utility			m}:
Doctype			
Custom			
Cultoni		Cancel	Save
		Cancer	Select Padding

Figure 32: Categories Value Configuration



* **Sizes:** Here user can select the size for the icon selected icon will display, click on the gearbox (icon configuration) here

Record To Preview 🕕	
Burlington Textiles Corp of America	×
Select Icon 🕕	
Static>{custom}:{custom63}:{large} (lcon)	$\mathfrak{a} \times$
Categories 🚯	
Static>standard (Multi Picklist)	$\mathfrak{a} \times$
Sizes 🚯	
	→ ‡

Figure 33: Size Configuration

• **Value Source**: Here user can select a value source for size and by default value source selected is static

			Config 🕕	×	<
		Sizes Configuration			
	* Value Source 🕕				
	Static			•	6
	Custom Metadata			^	
	Custom Setting				iew
I	Record Field			- 114	fext
I	✓ Static				′ m}:
			Cancel	Save) ard
				Sizes	

Figure 34: Value Source Configuration

- Value Type: This is a read-only field that shows the data type of the field for size
- Value: Here user can select the size and the selected size will display here



31

		Config 🚯	×
	Sizes Configuration		
* Value 🚺 🗸			_
X Small			
Small			iew
Medium			Text
Large			• m}:
		Cancel	Save
			Sizes

Figure 35: Size Value Configuration



* **Is Read Only:** This field is a checkbox type of field and if the value is checked as true then the user cannot change the value from the page/preview

Record To Preview 🕕	
Burlington Textiles Corp of America	×
Select Icon 🕕	
Static>{custom}:{custom63}:{large} (lcon)	$\infty \times$
Categories 🕕	
Static>standard (Multi Picklist)	\$ \$
Sizes 🕕	
Static>medium (Multi Picklist)	\$ \$ \$
Is Read Only 🕕	
	⇒ 🌣

Figure 36: Read Only Configuration

- Value Source: Here user can select a value source for is read-only and by default value source selected is static
- Value Type: This is a read-only field that shows the data type of field for read-only
- · Value: Here user can check the checkbox

		Account Type	\rightarrow
	Is Read Only Configuration	Account type	
* Value Source 🕕			
Static			•
* Value Type 🚯			
Checkbox			•
🗌 Value			
		Cancel	ave
		Sizes	0

Figure 37: Read Only Value Configuration

* **Padding Location:** Defines the position of the padding for a component. The padding creates extra space within a component

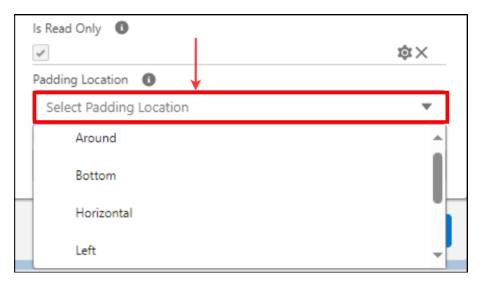
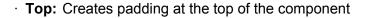


Figure 38: Padding Location Configuration

· Around: Creates padding around the component



- · Left: Creates padding at the left side of the component
- · Bottom: Creates padding at the bottom of the component
- · Right: Creates padding at the right side of the component
- · Horizontal: Creates padding horizontally
- · Vertical: Creates padding vertically
- * Padding Size: The padding size of the component can be set to:

Padding Location 🕕	
Around	-
Padding Size 🚯 🕌	
Select Padding Size	•
X Small	*
Small	
Medium	
Large	-

Figure 39: Padding Size Configuration

- · None
- · xxx-small
- · xx-small
- · x-small
- Small
- Medium
- · Large
- · x-large
- Margin Location: Defines the position of the margin for a component. margin creates extra space around a component.

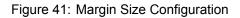


Padding Size 🕕	
Small	•
Margin Location 🚯 😽	
Select Margin Location	•
Around	
Bottom	
Horizontal	
Left	-

Figure 40: Margin Location Configuration

- · Around: Margin gets added around the component
- Top: Margin gets added at the top of the component
- Left: Margin gets added at the left side of the component
- Bottom: Margin gets added at the bottom of the component
- Right: Margin gets added at the right side of the component
- Horizontal: Margin gets added horizontally
- · Vertical: Margin gets added vertically our business
- * Margin Size: The margin size of the view can be set to:

Margin Location 🚯		
Bottom	•	
Margin Size 🚯 😽		_
Select Margin Size		
X Small		
Small		
Medium		
Large	-	





- None
- xxx-small
- · xx-small
- · x-small
- · Small
- · Medium
- · Large
- · x-large

After clicking on the Save button the config will get saved on the component config object and the user can view this button on the Record page, App page, Home Page, Flows, and Community.

- Preview Section:

After the user has selected and filled the fields according to their requirements, they can preview the components in the Preview section before saving them on the Record Page, App Page, Flows, and Community Page.

Q Search	★▼ 🖩 🌣 ? 🌣 🐥 🐻
PWR Components Designer	/
PWR Component Designer Component Component Component	Config ♥ ▼ Account Type × + 章
Preview	Attributes
	Record Object Account Record To Preview Burlington Textiles Corp of America
	Select (con ① Static>(custom):(custom63):(large) (lcon) 拉× Categories ①
	Static>standard (Multi Picklist) Sizes Static>medium (Multi Picklist) Static>medium (Multi
	Padding Location

Figure 42: Preview Section

2.51

1.5M

1м

500k

Od

- PWR Icon screenshots:

* PWR Icon on Record Page:

٠	Q Search	🖈 🖬 🖨 ? 🌣 🐥 🐻
Service Home Chatter Accounts V Contacts	✓ Cases ✓ Reports ✓ Dashboards ✓	0
Burlington Textiles Corp of America 🛦		+ Follow New Contact New Case New Note V
Type Phone Website Customer - Direct (336) 222-7000 www.burling	Account Owner Account Site ton.com Spwrc release & New York	Industry Apparel
۲		Activity Chatter
Related Details		Filters: All time + All activities + All types
Account Owner	Rating Warm	Refresh • Expand All • View All
Account Name Burlington Textiles Corp of America	Phone (336) 222-7000 Fax (336) 222-8000	Call 07-Dec Vou have an upcoming task with Ben Louis
Account Number CD656092 Account Site New York	Website www.burlington.com Ticker Symbol RTXT	November - 2023 This Month Second S
F * PWR Icon on H	igure 43: PWR Icon on Record	Page
➡ Service Home Chatter Accounts ∨ Contacts	Q Search V Cases V Reports V Dashboards V	★ ▼ 🖬 🌣 ? 🌣 🐥 🧑 ●
Ħ		Assistant
Quarterly Performance CLOSED 록18,20,000 OPEN (>70%) 룩2,70,000 GOAL 🎤		C ^e Edge Emergency Generator Edge Communications - 31/10/2023 - ₹35,000.00 Edit

Figure 44: PWR Icon on Home Page

Dec Closed + Open (>70%)

Closed

Goal

Recent Records

1

E.

÷.

Ben Louis

Burlington Textiles Corp of America

Sample Flow Report: Screen Flows

Perry Landstone Communications

Edge Emergency Generator

V.III.3 PWR Progress Bar:

 Introduction: Progress Bar displays the progress of an operation. Generally, the Progress Bar displays horizontally from left to right indicating the progress of an operation.

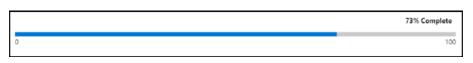


Figure 45: PWR Progress Bar

- Steps to create progress bar config:
 - * Go to the designer tab

	Q Search
PWR Components Designer	<u> </u>
PWR Component Designer Component Select Component	

So Figure 46: Designer – your business

* Select any component from the list of components

₽ <u></u> dR		Q Search		
PWR Components	Designer		1.1111. 1111. A.1.11	
PWR Component D	esigner		(
Select Component			*	
Button Group				
Icon				
Progress Bar			¯ <u>≤2242(</u> \	
Rating			•	
	Figure 47: Se	elect Component		

* Users can use existing Config, or users can create a new Config

		*• 🖿 🚓 ? 🌣 🖡	6
	Config 1	Create New	v Config
•	Search Config	Q +	
	Tasks progress Account Revenue Progress Opportunity Progress		
	Case Progress		

Figure 48: Select Config

* If the user creates a new config

		•	Search Config	×
	New (Config		5
* Label Revenue Progress		* Name Revenue_Progress		
* Page Type Record Page	•	* Object Name Account		•
				Save

Figure 49: Create Config

- · Label: Here user can set the title for the config of the component
- \cdot Name: The API name of the label is shown here
- Page Type: Here user can select page type as record page or non-record page; depending on which page the user wants to show the component
- **Non-Record Page:** By choosing the non-record page user can use this config on the home page and app page

Ê



- **Record Page:** By choosing the record page user can use this config on a related record object
- **Object Name:** Here user can choose any object on which that created config will be shown

Here are the details around different attributes, and which valid information can be input for the same.

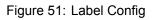
- Attributes:
 - * **Record Object:** The object name is auto-populated here as you select the object at the time of config creation.
 - * **Record To Preview:** This feature helps you preview and evaluate the progress bar's appearance according to the selected record.

Attributes		
Record Object	t ()	
Account		•
Record To Pre	view 🕕 🗸	
Select Rec	ord To Preview	Q
Burlington	Textiles Corp of America	
Perry Lands	stone Communications	
Sample Acc	count for Entitlements	
sForce		
GenePoint		
Value 0		
0		tột L
Show Value	0	
		\$

Figure 50: Select Record to Preview

* Label: Here user can set the title for the component. User can set the label by given value sources in the property binder.

Attributes	
Record Object 🚯	
Account	•
Record To Preview 🕚	
Burlington Textiles Corp of America	×



		Config 🚺	×
	Label Configuration		
* Value Source (
Static			-
* Value Type 🕚			
Text			▼ iew
* Value 🕚 🗸			ſex
Enter Value			
			_
		Cancel	Save
			End value

Figure 52: Label Value

* **Start Value:** "Start Value" refers to the initial point or position on a progress bar where the tracking of progress begins. You can set the start value for the progress bar by given value sources in the property binder, by default start value is set as 0.



Record To Preview 🕕	
Burlington Textiles Corp of America	×
Label 🕦	
Static>Total Revenue (Text)	\$X
Start Value 🕚	
0	tột
End Value 🕕	
100	tột

Figure 53: Start & End value Config

- * **End Value:** "End Value" refers to the maximum or final point of progress indicated on a progress bar. User can set the end value for the progress bar by giving value sources in the property binder, by default end value is set as 100.
- * **Value:** "Current Value" refers to the current progress within a process or task that is represented by a progress bar. User can set the progress value for the progress bar by given value sources in the property binder.

Label 🕕	
Static>Total Revenue (Text)	ά×
Start Value	
0	ţ.
End Value 🕕	
100	tột
Value 🚯	
0	∞

Figure 54: Value Config



		Attributes 🗙
	Value Configuration	
* Value Source 🕚		
Static		•
* Value Type 🕕		
Number		Ψ
* Value 🕚 🗸		
0		
		Cancel Save

Figure 55: Progress Value

* **Show Value:** "Show Value" is a feature in a progress bar that allows you to display the start value and end value on the progress bar.

	×-
Show Value Configuration	
* Value Source ()	lew Text
Static	
* Value Type 1 Checkbox	•
Value	
	Cancel Save
	Show Value 🕕

Figure 56: Show Value Config

 Show Percentage: "Show Percentage" is a feature in a progress bar that allows you to display the completion percentage on the progress bar. User can set the show progress for the progress bar by given value sources in the prop



erty binder.

)	×
	Show Percentage Configuration			0
ł.				iew
	*Value Source 🕕			ſexti
	Static		•	
	* Value Type 🕚			Reve
	Checkbox		-	1
l	Value			
		Cancel	Save	
			Show Value	0

Figure 57: Show Percentage Config

* **Is Vertical:** This checkbox property enables the user to show their progress bar vertically. User can set the progress value for the vertical by given value sources in the property binder.

			×	<
	Is Vertical Configuration			
* Value Source 🚯				iev Tex
Static			-	I
* Value Type 🕚				<e'< th=""></e'<>
Checkbox			~	1
🗌 Value <	-			
		Cancel	Save	
			Show Value	0

Figure 58: Is Vertical Config

 Show Radius: This property enables the user to show their progress bar with rounded corners. Users can set the progress value for the show radius by given



value sources in the property binder.

			0	×
	Show Radius Configuration			
* Value Source 🚯				
Static				
* Value Type 🕚				ge
Checkbox			*	
🗌 Value <	-			
		Cancel	Save	0
			Variant	0

Figure 59: Show Radius Config

* **Variant:** Variants display the Progress Bar with different colors to convey different meanings, user can change the appearance of the progress bar by selecting one of the options given, by default Brand variant is selected. Progress bar comes in five variants:

			Value 🚺	×	
	Variant Configuration			>	
* Value Type				ge	
Picklist			-		
* Value 🕚 🗸					
Select Value			-	0	
Brand					
Success				÷	
		Cancel	Save	2n	
			Colort D	ad all in an	
	Figure 60: Varient Config				

· **Brand:** Shows Progress Bar in Blue color

- Success: Shows Progress Bar in green color
- * **Size:** User can set their preference for the thickness of the Progress Bar; Users can get the size through the different value sources in the property binder.

	Size Configuration		
Value 🚯 😽			
Select Value			•
X Small			-
Small			- 11
Medium			
Large			-
		Cancel	Save

Progress Bars are available in four sizes i.e.

- · x-small
- small
- · medium
- · large
- * **Padding Location:** Defines the position of the padding for a component. The padding creates extra space within a component.



Is Read Only 🕕	
*	ΰ×
Padding Location 🚯 🔶	
Select Padding Location	-
Around	
Bottom	
Horizontal	
Left	-

Figure 62: Padding Location Config

- **Around:** Creates padding around the component
- **Top:** Creates padding at the top of the component
- · Left: Creates padding at the left side of the component
- · Bottom: Creates padding at the bottom of the component
- **Right:** Creates padding at the right side of the component
- · Horizontal: Creates padding horizontally
- · Vertical: Creates padding vertically
- * Padding Size: The padding size of the component can be set to:

Padding Location 🚯	
Around	•
Padding Size 🚯 😽	
Select Padding Size	•
X Small	*
Small	
Medium	
Large	-

Figure 63: Padding Size Config



- · None
- xxx-small
- xx-small
- · x-small
- Small
- · Medium
- · Large
- · x-large
- * **Margin Location:** Defines the position of the margin for a component. margin creates extra space around a component.

Padding Size 🚯	
Small	•
Margin Location 🕕 🔶	
Select Margin Location	Ψ
Around	A
Bottom	
Horizontal	
Left	-

Figure 64: Margin Location Config

- · Around: Margin gets added around the component
- Top: Margin gets added at the top of the component
- · Left: Margin gets added at the left side of the component
- · Bottom: Margin gets added at the bottom of the component
- · Right: Margin gets added at the right side of the component
- · Horizontal: Margin gets added horizontally
- · Vertical: Margin gets added vertically



* Margin Size: The margin size of the view can be set to:



Figure 65: Margin Size Config







- None
- xxx-small
- xx-small
- · x-small
- Small
- · Medium
- · Large
- · x-large

After clicking on the Save button the config will get saved on the component config object and the user can view this button on the Record page, App page, Home Page, Flows, Community.

- Preview Section:

After the user has selected and filled the fields according to their requirements, they can preview the components in the Preview section before saving them on the Record Page, App Page, Flows, and Community Page.





	Q Search 🖈 🖿 🏩 😤 ?) 🌣 🛊 🧐
PWR Components Designer	nn i waonat - DAST (The and Asao and - DAST (The and Asao and - DAST (The a	
PWR Component Designer Component © Progress Bar	Config 💿 Revenue Progress	× + 💼
Preview	Attributes	
Total Revenue	35% Complete Account	Ŧ
٥	1000000 Record To Preview Burlington Textiles Corp of America	×
	Label Static>Total Revenue (Text)	¢×
	Start Value • 0 End Value •	¢
	Static>100000 (Number) Value 💿	\$X
	Record Field>Account>Annual Revenue Show Value	ø×

(č.

Figure 66: Preview Section

- PWR Progress Bar screenshots:

* PWR Progress Bar on Record Page:

Service Home Chatter Accounts V Contacts	Q Search V Cases V Reports V Dashboards V	× 🖬 🌣 ? 🌣 🖡 🐻
Account Burlington Textiles Corp of America	SOME DISSUE <u>TIO</u> SISEEESSISEESSISE	+ Follow New Contact New Case New Note V
Type Phone Website Customer - Direct (336) 222-7000 www.burlingt	Account Owner Account Site	Industry Apparel
Related Details	Rating	Total Revenue 75% Complete 0 1000000
Count Name Burlington Textiles Corp of America	Warm Phone (336) 222-7000	Activity Chatter
Parent Account	Fax (336) 222-8000	
Account Number CD656092	Website www.burlington.com Ticker Symbol	Filters: All time • All activities • All types 🕸 Refresh • Expand All • View All
New York	BTXT Ownership	✓ Upcoming & Overdue
Customer - Direct	Public Employees	Call 07-Dec Vou have an upcoming task with <u>Ben Louis</u>

Figure 67: PWR Progress Bar on Record Page

* PWR Progress Bar on Home Page:

Q Search	ו 🖩 🌣 ? 🌣 🖡 🐻
Service Home Chatter Accounts V Contacts V Cases V Reports V Dashboards V	
Quarterly Performance CLOSED ₹18,20,000 OPEN (>70%) ₹2,70,000 GOAL 🖋	C ⁴ Tasks Progress 79% Complete
2.5M 2M 1.5M 1M	Assistant Image: Second state state Image: Second state state state Edge: Emergency Generator Edge: Communications + 31/10/2023 + ₹35,000.00 Edit Edit
500k 0 2023,12-01 Oct Nov 2023,12-01 Today's Events Goal Closed + Open (>70%)	Recent Records Image: Burlington Textiles Corp of America Image: Sample Flow Report: Screen Flows
Most Recent Activity V Q. Search this	feed C ^a Edge Emergency Generator

Figure 68: PWR Progress Bar on Home Page





V.III.4 PWR Rating:

- Introduction:

The PWR Rating component is used for rating purposes. It can be used for giving ratings to an object, fields, etc. We can display the rating on the Home Page, Record Page, Flows, Community Page, etc.

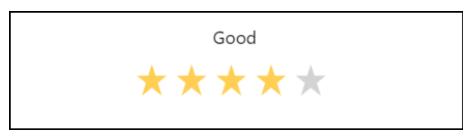


Figure 69: PWR Rating

- Steps to create rating config:

* Go to the designer tab

(€ P ^d R	Q Search	
PWR Components	Designer	
Component Component	signer	INSENT

Figure 70: Designer

* Select any component from the list of components



₽ <mark>₫</mark> ₽	Q Search
PWR Components Designer	
PWR Component Designer	CNN SOMME ODSOLUTION AUTONOCIMUE ODSOLUTION
Select Component	*
Icon	
Progress Bar	
Rating	
Related List	-

Figure 71: Select Component

* Users can use existing Config, or users can create a new Config

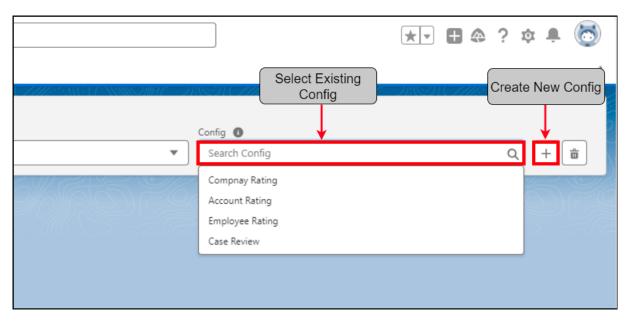


Figure 72: Select Config

* If the user creates a new config

		Search Config	>
	New	Config	
* Label		* Name	
Account Rating		Account_Rating	
* Page Type		* Object Name	
Record Page	•	Account	-

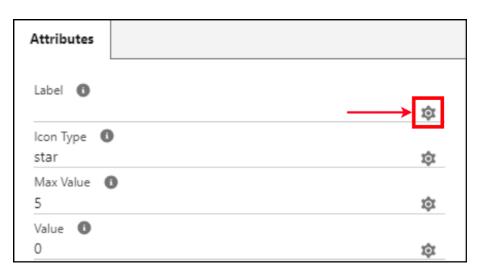
Figure 73: Create Config

- · Label: Here user can set the title for the config of the component
- Name: The API name of the label is shown here
- **Page Type:** Here user can select page type as record page or non-record page; depending on which page the user wants to show the component
- **Non-Record Page:** By choosing the non-record page user can use this config on the home page and app page
- **Record Page:** By choosing the record page user can use this config on a related record object
- **Object Name:** Here user can choose any object on which that created config will be shown

Here are the details around different attributes, and which valid information can be input for the same.

– Attributes:

- * **Record Object:** The object name is auto-populated here as you select the object at the time of config creation.
- * **Record To Preview:** This feature helps you preview and evaluate the rating's appearance according to the selected record.
- Label: Here user can set the title for the component. Users can set the label by given value sources in the property binder.



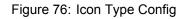


		Config 🕕	×
	Label Configuration		
	Value Source 🕕		
	Static		•
	Value Type 🚯		
7	Text		-
	Value 🗊 🚽		
	Enter Value		
			_
		Cancel	Save



* **Icon Type:** This feature allows users to choose the style of icons or symbols that will be displayed to users when they rate or provide feedback. Users can set the icon type by given value sources in the property binder.

Attributes	
Label 🚯 Static>Account Rating (Text)	\$ \$
lcon Type 🕚 star	→ \$
Max Value 🚯	¢



			Attributes
		Icon Type Configuration	
	Picklist		▼ _ nt
	*Value 🕕	↓	
7	Select Value		
ĺ	Circle		
	Smiley		
L	Star		
		Cance	Save

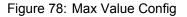
Figure 77: Icon Type Value

There are three Icon types, in which the user can fill in the feedback/ ratings by default star icon type is selected

- **Circle:** If the user selects the icon type value as a circle, then the circle will display
- **Smiley:** If the user selects the icon type value as smiley, then smiley will display
- **Star:** If the user selects the icon type value as a star, then the star will display

* **Max Value:** "Max Value" in ratings refers to the highest or maximum achievable value within a rating scale. For example, on a rating scale of 1 to 10 where 10 represents the "Max Value", by default max value is set as 5. Users can set the max value through the different value sources in the property binder.

Icon Type 🕚 star	\$
Max Value 🚯 5	→ \$
Value 🕕	
0	ţ.



		Attributes	
	Max Value Configuration		
	* Value Source 🕕	nt	R
	Static	•	
\mathcal{V}	* Value Type 🔹		
	Number	•	
	* Value 🕚		
	Enter Value	D	
		Cancel Save	

Figure 79: Max Value

* Value: The rating will be measured by the value in this field. Users can get the value through the different value sources in the property binder. By default, the value is set as 0. Users can set the value through the different value sources in the property binder.

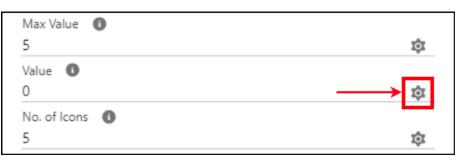


Figure 80: Value Config

	Account Rating	101	Static>A	X
7	Value Configuration			
	* Value Source 0			
	Static		-	D
	* Value Type 🕚			
	Number		*	
	* Value 🚯			
	Enter Value			
	Ca	ancel	Save	
				bn De daliare

Figure 81: Progress Value

 No. of icons: This feature allows users to determine how many individual icons or symbols will be displayed to users when they provide feedback, by default no. of icons is selected as 5. Users can get the no. of icons through the different value sources in the property binder.

Value 🚯 O	¢
No. of Icons 🚯 5	→ ©
Size 🕕 small	ŵ

Figure 82: No of Icons Config

ļ	Account Rating	Icon Type	X
Y	No. of Icons Configuration		
	* Value Source 🚯		
	Static * Value Type	•	D
I	Number *Value	Ψ.	
I	Enter Value		
I	Cancel	Save	an
		Soloct P	

Figure 83: No of Icons Value

* Size: User can set the size of the rating icons; Users can get the size through the different value sources in the property binder.

No. of Icons 🚯 5	\$
Size 🕕 small	→ ¢
Show Value 🚯	
	\$

Figure 84: Size Config



	Account Rating			Static>Ac	X
7		Size Configuration			
	* Value 🚯 🗸				^
	Select Value			-	
	X Small				
I	Small				
I	Medium				3
	Large			-	
I			Cancel	Save	on
				Coloct D	

Figure 85: Size Value

Rating sizes are available in four sizes i.e., x-small, small, medium, and large

* **Show Value:** "Show Value" is a feature in a rating that allows the user to display the rating value on the rating component. Users can set the show value through the different value sources in the property binder.

		×
	Show Value Configuration	iew
* Value Source (1)		Text
Static		•
* Value Type 🕚		Rev
Checkbox		*
Value		
		Cancel Save
		Show Value 🚯

Figure 86: Show Value Config

61

* Read Only: If the value is checked as true then the user cannot change/edit the

Æ

value from the page/ preview. Users can set the read-only through the different value sources in the property binder.

		~
	Account Type	
Is Read Only Configuration		
* Value Source () Static		•
* Value Type Checkbox		▼ iew
Value		fext
	Cancel	Save ard
		Sizar A

Figure 87: Read Only Config

* **Padding Location:** Defines the position of the padding for a component. The padding creates extra space within a component.

Is Read Only 🕕	
~	\$\$
Padding Location 🕕 🗸	
Select Padding Location	•
Around	
Bottom	
Horizontal	
Left	-

Figure 88: Padding Location Config

- · Around: Creates padding around the component
- $\cdot\,$ Top: Creates padding at the top of the component
- $\cdot\,$ Left: Creates padding at the left side of the component



- · Bottom: Creates padding at the bottom of the component
- $\cdot\,$ Right: Creates padding at the right side of the component
- · Horizontal: Creates padding horizontally
- · Vertical: Creates padding vertically
- * Padding Size: The padding size of the component can be set to:

 Padding Location 🕕	
Around	•
Padding Size 🕕 🗸	
Select Padding Size	•
X Small	
Small	
Medium	
Large	-

Figure 89: Padding Size Config

- · None
- · xxx-small
- xx-small
- · x-small
- Small
- · Medium
- Large
- · x-large
- * **Margin Location:** Defines the position of the margin for a component. margin creates extra space around a component.



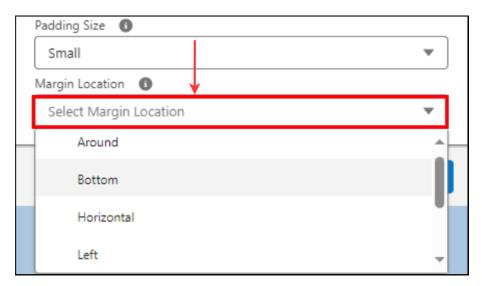


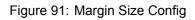
Figure 90: Margin Location Config

- · Around: Margin gets added around the component
- Top: Margin gets added at the top of the component
- Left: Margin gets added at the left side of the component
- · Bottom: Margin gets added at the bottom of the component
- · Right: Margin gets added at the right side of the component
- Horizontal: Margin gets added horizontally
- · Vertical: Margin gets added vertically OUNDUSINESS
- * Margin Size: The margin size of the view can be set to:





	Margin Location 🕕		
	Bottom	•	
	Margin Size 📵 🚽		
	Select Margin Size	•	
_	X Small	^	_
	Small		
	Medium		
	Large	-	





After clicking on the Save button the config will get saved on the component config object and the user can view this button on the Record page, App page, Home Page, Flows, and Community.



- Preview Section:

After the user has selected and filled the fields according to their requirements, they can preview the components in the Preview section before saving them on the Record Page, App Page, Flows, and Community Page.

^d ℝ	Q Search		** 🖬 🗠 ? 🌣 🐥 🐻
PWR Components Designer			1
DWR Component Designer	COMESTIC INNOVICE AREACOMESTIC	NING THE TREASURED STREET	ANTE ANNOUNCE DISSUE THE SALE EXAMPLE
Component O Component		Config (0	
Rating		Account Rating	× + a
Preview		At	ributes
			Del O
			atic>Account Rating (Text) 🕸 🗙
	Account Rating		n Type 🔘
	Good	st	Ψ
		M: 5	ix Value 🕚
	\star \star \star \star		ue O
			atic>4 (Number) 🕸 🗙
			of Icons
		5	\$
			e 🛈 nall 🖄
			all 🕸
			-
			ad Only
•	Q Search		business 🖈 🖩 🏟 ? 🌣 🖡 👼
Service Home Chatter Acco	Q Search Q Search Contacts V Cases V Reports V Dashb		
Service Home Chatter Acco	ounts V Contacts V Cases V Reports V Dashb	oards V	** 🗄 🏩 ? 🌣 🖡 🐻
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Account Burlington Textiles Corp of A	ounts V Contacts V Cases V Reports V Dashb America A Website Account Owner	oards V + I Account Site Industry	★▼ ■ � ? \$ # @
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Account Burlington Textiles Corp of J Type Phone Customer - Direct (336) 222-7000 Related Details	ounts ✓ Contacts ✓ Cases ✓ Reports ✓ Dashb America A Website www.burlington.com Öpvrcratease ₽	oards V + I Account Site Industry	Image: Customer Rating Good
Account Burlington Textiles Corp of A type Phone Customer - Direct Related Details Account Owner Customer Custo	America A Website Account Owner www.burlington.com Rating Warm Phone	oards V + I Account Site Industry New York Apparel	Illow New Contact New Case New Note V
Account Burlington Textiles Corp of A type Customer - Direct Related Details Account Owner Customer Cu	America A Website Account Owner www.burlington.com Rating Warm Phone (336) 222-7000	oards V + I Account Site Industry New York Apparel	Image: Customer Rating Good
Account Burlington Textiles Corp of A Uppe Customer - Direct Related Details Account Owner Customer Account Name	America A Website www.burlington.com Rating Phone (356) 222-7000 Fax	oards v	Image: Contact New Contact New Case New Note Image: Customer Rating Good Image: Customer Rating Image: Customer Rating <t< td=""></t<>
Account Burlington Textiles Corp of <i>I</i> Type Customer - Direct Related Details Account Owner Cmyrcrelease Account Name Burlington Textiles Corp of America Parent Account	America A Website www.burlington.com Phone (336) 222-2000 Fax (336) 222-2000	oards v	Image: Customer Rating Good
Account Burlington Textiles Corp of A Type Customer - Direct Related Details Account Owner Customer Account Name Burlington Textiles Corp of America	America A Website www.burlington.com Rating Warm Phone (336) 222-7000 Fax (335) 222-8000 Website	oards v	Image: Contact New Contact New Case New Note Image: Customer Rating Good Image: Customer Rating Image: Customer Rating <t< td=""></t<>
Account Burlington Textiles Corp of A	America A Website www.burlington.com Rating Warm Phone (336) 222-7000 Fax (335) 222-8000 Website	oards + I Account Site Industry New York Apparel	Image: Contact New Contact New Contact New Case New Note Image: Contact Customer Rating Good Image: Contact Good Image: Contact Image: Contact Image: Contact New Contact New Contact New Contact New Contact New Case New Note Image: Contact
Account Burlington Textiles Corp of A Type Customer - Direct Customer Custo	America A Website www.burlington.com Rating Warm Phone (336) 222-7000 Fax (336) 222-7000 Fax (336) 222-7000 Website www.burlington.com	oards + I Account Site Industry New York Apparel	Image: Contact New Contact New Contact New Case New Note Image: Contact Customer Rating Good Image: Contact Good Image: Contact Image: Contact Image: Contact New Contact New Case New Note Image: Contact New Contact New Case New Note Image: Contact Im
Account Burlington Textiles Corp of A Super Sup	America A Website www.burlington.com Bating Warm Phone (336) 222-7000 Fax (336) 222-7000 Fax (357) 7 Fax (357) 7 Fa	oards v	Image: Contact New Contact New Contact New Case New Note Image: Contact Customer Rating Good Image: Contact Good Image: Contact Image: Contact Image: Contact New Contact New Contact New Contact New Contact New Case New Note Image: Contact
Account Burlington Textiles Corp of A Type Customer - Direct Customer - Direct Customer - Direct Customer Custo	America	oards V Account Site Industry New York Apparel	Image: Contact New Contact New Contact New Case New Note Image: Contact Customer Rating Good Image: Contact Good Image: Contact Image: Contact Image: Contact New Contact New Case New Note Image: Contact New Contact New Case New Note Image: Contact Im

Figure 93: PWR Rating on Record Page

* PWR Rating on Home Page:

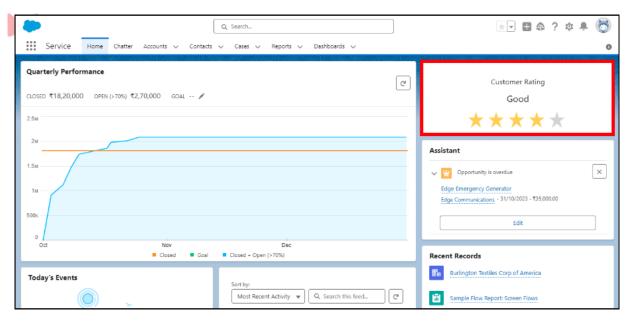


Figure 94: PWR Rating on Home Page





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V.III.5 PWR Related List:

- Introduction:

With the help of a related list, the user can show the related data of objects and the user can show the data up to 3 the level hierarchy.

7 Records.					Q 54	sarch	C" 🔻
Invoice Id	~	Due Date	~	Total Charges	~	Status	~
IN-0007		20/12/2023		9800		Completed	Ŧ
IN-0006		16/11/2023		5700		Pending	¥
IN-0005		14/12/2023		90000		Pending	
IN-0004		13/11/2023		40000		Pending	
IN-0003		16/11/2023		56000		Processed	
IN-0002		23/11/2023		5500		Pending	
IN-0001		24/10/2023		6000		Completed	

Figure 95: PWR Related List

- Steps to create related list config:
 - * Go to the designer tab

© ₽ [€] R	Q Search	
PWR Components	Designer	
Component Component	Designer	▼

Figure 96: Designer

* Select any component from the list of components

₽ [₿] ℝ				Q Search	
PWR	Components	Designer	Accounts 🗸	Contacts 🗸	
	/R Component De	signer		TANNOMME DISCH CHHISTANIS (TANNOMME DISC	
s and the second	elect Component			*	
201	Progress Bar				
	Rating				
	Related List				
	Timeline			*	

Figure 97: Select Component

* Users can use existing Config, or users can create a new Config

			* -	₽ 🍣	?:	¢	6
92555 ((S. 17 NINKO //////C D)	Config 🚯	Select Existing Config			Creat	e New C	Config
•	Search Config				Q	+	a
	All Contracts					X	
	Order Items						
	Product Invoices	5					
	Contact Roles						

Figure 98: Select Config

* If the user creates a new config

		•	Search Config	×
	New (Config		
* Label Product Invoices]	*Name Product_Invoices		
* Page Type		* Object Name		
Record Page	•	Account		_
				Save



- · Label: Here user can set the title for the config of the component
- Name: The API name of the label is shown here
- **Page Type:** Here user can select page type as record page or non-record page; depending on which page the user wants to show the component
- **Non-Record Page:** By choosing the non-record page user can use this config on the home page and app page.
- **Record Page:** By choosing the record page user can use this config on a related record object
- **Object Name:** Here user can choose any object on which that created config will be shown

Here are the details around different attributes, and which valid information can be input for the same.

- Attributes:
 - * **Record Object:** The object name is auto-populated here as you select the object at the time of config creation.
 - * **Record To Preview:** This feature helps you preview and evaluate the related list's appearance according to the selected record.

Attributes		
Record Objec	t 🛈	
Account		-
Record To Preview 🕦 🗸 🗸		
Select Record To Preview		Q
Burlington Textiles Corp of America		
Perry Landstone Communications		
Sample Account for Entitlements		
sForce		
GenePoint		

Figure 100: Select Record to Preview

* **Child relationship:** The "Child relationship" field allows you to choose the child object you want to display in the related list.

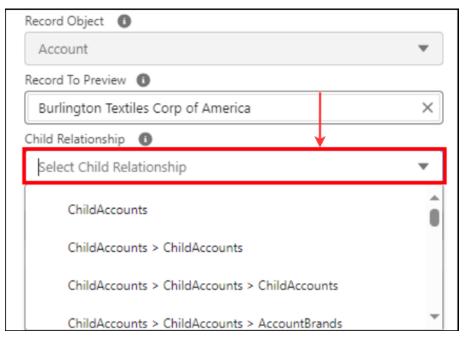


Figure 101: Child Relationship Config

 * Object Name: Selected child relationship object name will be auto-populated here in read-only format. If no child relationship object is selected, then by default, the record object is auto-populated in this field, or else here you have to



choose an object.

Child Relationship 🕕	
Select Child Relationship	▼
* Object Name 🚯	
Select Object Name	•
Account	Ô
Account Brand	
Address	
Al Insight Action	-

Figure 102: Object Config

* **Display Fields:** Display Fields allow you to choose the fields from the display fields that you want to display in the related list. The fields that you selected here are displayed in the selected fields.

* Display Fields 🚯		
Search Field		Q
Account Desc	C Account Fax	-
Aa Account ID	A _a Account Name	
Aa Account Num	Account Phone	-
Selected Fields		
No Fields Selected		

Figure 103: Display Fields Config

* **Show Search:** The "Show Search" checkbox allows you to enable or disable the search functionality within the related list. Search Bar will be displayed at the top of the related list.

* **Search Fields:** "Search Fields" allows you to customize the search experience by choosing which fields you want to be included in the search results for this related list.

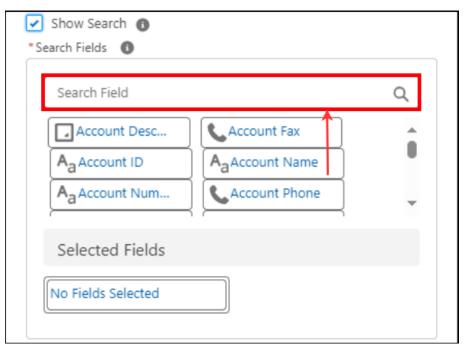


Figure 104: Search Fields Config

* Filter Criteria: The "Filter Criteria" section allows you to customize the display of the related list based on specific criteria. Criteria can be set from multiple value sources

Filter Criteria 🚯	
Evaluation Criteria	
All Conditions Are Met	•
+ Add Condition	Remove All
Show Checkbox 🚯	

Figure 105: Filter Criteria Config

73

- * **Record Selection:** The "Record Selection" is a picklist type field in which it contains "No Selection", "Single Select", "Multi Select" and by default, the "No Selection" is selected
- Single Select: The Single Select activates the radio button for choosing a single record



- * **Multi Select:** The Multi-select activates the checkboxes for choosing multiple records at once
- * **Max Selected Record Count:** The "Max Selected Record Count" field allows you to set a maximum limit for the number of records that can be selected in this related list.
- * **Infinite Scrolling:** Enabling the "Infinite Scrolling" checkbox will assist users in scrolling through the data table and retrieving records according to scrolling.
- * **Page Size:** The "Page Size" option allows you to specify the number of records displayed per page in the related list.

Show Checkbox	0	
Page Size 🛛 🕕		
20		•
Order By 🕚	1	
٩		

Figure 106: Page Size Config

- * **Summarize Field:** "In Related List, we employ a 'summarize' field to calculate data based on various filters such as static, all records, and custom filters. Users have the flexibility to choose from different aggregate types, including sum, min, max, average, count, and distinct count. Depending on the selected aggregate type and the applied filter conditions, the 'summarize' field generates calculated results. This functionality allows users to obtain specific insights and metrics from the data table by aggregating information according to their preferences and requirements"
- * UI of the summarize field using this UI user can easily config the summary metrics

Sumr	marize Field
'Label 🚺	*Name 0
Total Accounts	Total_Accounts
Help Text	*Aggregate Type 🕚
Enter Help Text	Count 💌
* Field : Opportunity () > Account	* Filter Type 🚺
Account Name	▼ Static Filter ▼
	Cancel Save

Figure 107: Summarize field Config

* From here user can give the label, and help text to the summarize field



	Update Sum	imarize Field	
*Label Sum Of Amount		*Name O Sum_Of_Amount]
Help Text 0 Here you can see the sum of all amount		*Aggregate Type ① Sum]
* Field : Opportunity Amount	↑	* Filter Type Static Filter]
		Cancel Save	

Figure 108: Summarize field Config

* Using Aggregate Type user can select the aggregate type like sum, max, min, etc., and apply the summary metrics on the data

(B)) 5 5 11 (D) (D) (B)) 5 5 11		×
Sum	nmarize Field	
*Label 🚺	*Name 🕕	
Sum Of Amount	Sum_Of_Amount	
Help Text 🕚	*Aggregate Type 🕕 🔻	
Here you can see the sum of all amount	Select Aggregate Type	
	Avg	<u> </u>
	Count	
	Count Distinct	
	Max	•

Figure 109: Aggregate of Summarize field

* Here user can select the field on which the user wants to create summary metrics so, from the picklist user can select the object field

			Table Actions
	Summar	ize Field	
*Label 🕕		Name	
Sum Of Amount		Sum_Of_Amount	
Help Text 🕚		*Aggregate Type 🕚	
Here you can see the sum of all amount		Sum	~
* Field : Opportunity 0			
Select Field	•		
Account >	<u>.</u>		Cancel Save
Amount			Cancer Save
Campaign >			Label : Delete
Contact >	•		Show Row Number

Figure 110: Field for Summarize config

- * From here user can select the filter type as mentioned below:
 - 1. Custom filter
 - 2. All records
 - 3. Static filter





so, based on this filter user can show summary metrics using a data table.

- * **Custom filter:** When the user selects the custom filter then the user can apply the custom logic for the summary metrics and this logic overrides the static filter applied on the data table and shows the summarize metric
- * All records: When the user selects the all records filter the summarize filter is applied to the total data present in the object and then the summary calculation proceeds
- * **Static Filter:** When the user selects the static filter then summarizes fieldwork according to the static filter and shows the data according to the static filter

	Table Actions
Summa	rize Field
*Label 🔕	'Name 🕕
Sum Of Amount	Sum_Of_Amount
Help Text 🔘	*Aggregate Type 0
Here you can see the sum of all amount	Sum 💌
* Field : Opportunity 0	* Filter Type 0
Amount	Select Filter Type
	All Records
	Custom Filter
	Static Filter

Figure 111: Filter of summarize config

* Here user can see the summary metrics of all the config of the summarize field with the proper name of the config and calculation of the summary field

Ψ	Opportuni All Oppor								
Total 17	Accounts	Sum Of Amount ① 201000							
7 Rec	ords.						٩	Search	C,
	Nam	e	~ Amou	t	~	Account ID>Account Name	~	Account ID>Employees	\sim
1	Zept	0	13000			Swiggy		4	(
2	Uber	Eats	15000			Swiggy		4	(
3	Peter	r Spring	15000			Swiggy		4	(
4	Senk	ers	12500			Swiggy		4	(
5	Melt	on	20000			Swiggy		4	(
6	Peter	England				Swiggy		4	(
7	E - S	port	12000			Swiggy		4	(
8	Dell		12000			Swiggy		4	(
9	Cyba	ge	16000			Swiggy		4	(
10	Bosh		14500			Swiggy		4	(

Figure 112: Summarize Column

 Order By: "Order By" allows the user to specify the way they want the related list items to be displayed; "Order " allows the user to organize the items in this related list either in ascending or descending, by default ascending is selected.

Order By 🟮		
⊕ ←		
No Order By		

Figure 113: Order By Config

		×
	Order By	0
* Field { Invoice }		Drite
Invoice Id		▼ itio
Order 🕚	•	Con
Ascending		-
		CKI
	Cancel	Add
		Order By 🕚

Figure 114: Order By value

* **Table Action:** The user can create multiple table actions on the related list. By default, only new actions are displayed, which are visible in the top right corner.

Table Actions 🕚		
0		
Label :	New	•

Figure 115: Table Action Config



	lable	Actions	
*Label 🚯		*Name 🚯	_
New Invoice		New_Invoice	
Left Icon 🕕		Right Icon 🕕	
+		0	
Variant 🕕		Min Selected Count 🚯	_
Neutral	•	Enter Min Selected Count	
Hide Action 1			
*Type 🚯			
New	•		
* Object Name			
Invoice	•		

Figure 116: Table Action Value

- · Label: The Label provide a name or description for a specific table action
- Name: API name of the label is shown here.
- Left Icon: This feature enables you to display an icon on the left side of an action, adding visual context and clarity to the action it represents.
- **Right Icon:** This feature enables you to display an icon on the right side of an action, adding visual context and clarity to the action it represents.
- · Variant: Allows to show Buttons in different color formats.
- **Neutral:** Neutral is the default variant of the Button which is displayed in white color
- **Brand:** Brand is a blue Button, used to draw attention to the primary action on a page
- Outline-brand: Outline-brand is similar to the brand variant, but the color is used for the label and border only, not the Button color



- **Destructive:** Destructive is a red Button used to warn that the action has a negative effect
- · Success: Success is a green Button used to indicate a successful action
- **Text Destructive:** This button is used to indicate a destructive action to the user
- * **Min Selected Count:** The "Min Selected Count" option allows the user to specify the minimum number of items that must be selected in the related list.
- * **Hide Action:** The Hide Action feature allows the user to control the visibility of specific items within a related list.
- * Action: User can create the actions here. For example, creating new records, navigating to any URL, editing any record, etc.
 - **Type:** Here user can select any specific type for that particular action
 - · Bulk Delete
 - · Custom Component
 - · Edit
 - Global Action
 - List View
 - · New
 - · Object Page Solutions to scale your business
 - · Quick Action
 - · Redirect
 - · Tab
 - · View
 - · Delete
- * **Row Actions:** User can create the row actions here, Actions to be performed at the record level for the respective record by default three actions are created view, edit, delete.



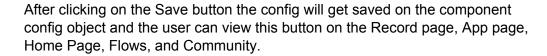
Row Actions 🕚		
•	-	
Label :	View	
Label :	Edit	•
Label :	Delete	•

Figure 117: Row Action Config

	Row Actions
*Label Edit Hide Action	*Name ① Edit *Action ① *Type ① Edit *Record Id Record Field>Invoice Invoice Id @X
	Cancel Save * Related List Icor

Figure 118: Row Action Value

- · Label: The Label provide a name or description for a specific table action.
- Name: API name of the label is shown here.
- **Hide Action:** The Hide Action feature allows you to control the visibility of specific items within a related list.
- Action: You can create the actions here. For example, creating new records, navigating to any URL, editing any record, etc.
- \cdot Type: Here user can select any specific type for that particular action



* **Preview Section:** After the user has selected and filled the fields according to their requirements, they can preview the components in the Preview section before saving them on the Record Page, App Page, Flows, and Community Page.

P		Q Search_			* 🖬 🗠 ? 🌣	t 🌲 🐻
PWR Compor	nents Designer Ac	counts 🗸 Contacts 🗸				1
PWR Component Component	onent Designer	an a		Config 🜒	nvoices X	+ 💼
Preview					Attributes	
7 Records.			Q Search	New C	Record Object Account Record To Preview Burlington Textiles Corp of America	• ×
Invoice Id	∽ Due Date	✓ Total Charges	 ✓ Status 	~	Child Relationship	
IN-0007	20/12/2023	9800	Completed		Contacts > Invoices_r	•
IN-0006	16/11/2023	5700	Pending		* Object Name 🚯	
IN-0005	14/12/2023	90000	Pending		Invoice	•
IN-0004	13/11/2023	40000	Pending		* Display Fields	
IN-0003	16/11/2023	56000	Processed		Search Field	Q
IN-0002	23/11/2023	5500	Pending			
IN-0001	24/10/2023	6000	Completed	V	A _a Record ID	

Figure 119: Preview Section





* PWR Related List on Record Page:

* PWR Related List on Home Page:

		Q Search			*	💩 ? 🕸 🖡 💿
*** Service Hom	e Chatter Accounts 🗸	Contacts 🗸 Cases 🗸	🗸 Reports 🗸 Dashboards 🗸	Invoices 🗸 Con	nponent Configs 🗸	0
Account Burlington Te	xtiles Corp of America	٨		(+ Follow New Contact New	Case New Note 🔻
Related Detail	s				Activity Chatter	
Invoice Invoice 7 Records. Invoice Id Invoice Id Invoice IN-0007 Invoice IN-0006 Invoice IN-0003 Invoice IN-0003 Invoice IN-0002 Invoice				New		
7 Records.			Q, Search	C" 🔻		Il activities • All types 🕸
Invoice Id	✓ Due Date	✓ Total Charges	✓ Status	\sim		fresh • Expand All • View All
IN-0007	20/12/2023	9800	Completed		✓ Upcoming & Overdue	
IN-0006	16/11/2023	5700	Pending		> 🖆 🗌 Call	07-Dec 💌
IN-0005	14/12/2023	90000	Pending		You have an upcoming task	with Ben Louis
IN-0004	13/11/2023	40000	Pending		V November - 2023	This Month
IN-0003	16/11/2023	56000	Processed			
IN-0002	23/11/2023	5500	Pending		> Email You had an event	2:00 PM 06-Nov 💌
IN-0001	24/10/2023	6000	Completed			
20 💌		\$	First < Prev 1 Next	: > Last >	No more past activiti	es to IOad.

Figure 120: PWR Related List on Record Page

Account	Accounts V Contact	Q Search	✓ Dashboards ✓ Invoices ✓	Component Configs		 2 2 4 2 4 4 5 4 5
Burlington Textiles	Corp of America 🛦			+ Follow	New Contact New Cas	e New Note 🔻
Related Details				5		
				Activity	Chatter	
7 Records.		Q, se	earch]	Filters: All time • All an Refree	tivities • All types
Invoice Id 🗸	Due Date 🗸	Total Charges V			ning & Overdue	
IN-0007 IN-0006 IN-0005	20/12/2023 16/11/2023 14/12/2023	9800 5700 90000	Completed Pending Pending T	j - > 🗐 (Call You have an upcoming task wit	07-Dec 💌
IN-0004	13/11/2023	40000	Pending 💌	√ Nover	mber - 2023	This Month
IN-0003 IN-0002	16/11/2023 23/11/2023	56000 5500	Processed Pending		Email	2:00 PM 06-Nov 💌
IN-0001	24/10/2023	6000 ☆ First <	Completed)	You had an event No more past activities t	to load.

Figure 121: PWR Related List on Home Page

V.III.6 PWR Timeline

- Introduction:

The timeline in Salesforce displays a chronological list of these activities, making it easier for users to understand the history and progression of a record.

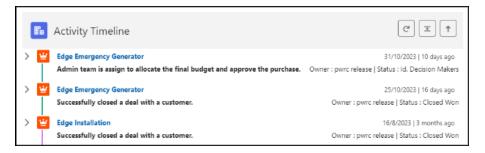


Figure 122: PWR Timeline

- Steps to create timeline config:
 - * Go to the designer tab

©P\$	R		Q Search		
P	WR Components	Designer 🗲			
Ű	PWR Component De Component ③ Select Component	esigner			JM€Л(<i>////</i>

Figure 123: Designer

* Select any component from the list of components



₽. ^d R	Q Search
PWR Components Designer	
PWR Component Designer Component Select Component Progress Bar Rating Related List	CANNOLING CONSCILCTNC AND CONTROL OF AND CONTRO
Timeline	

Figure 124: Select Component

* Users can use existing Config, or users can create a new Config

		* •	₽ �	? \$	à 🛉	6
A C <i>ATHE</i> S AND TO NUMBER OF DE	Config			Create	New (Config
•	Search Config			Q	+	
	Activity Timeline Timeline-Event Timeline- Case Activity Timeline- Opportunity Timeline- Contact				5	

Figure 125: Select Config

* If the user creates a new config

		•	Search Config	>
	New	Config		
* Label		*Name		
Activity Timeline		Activity_Timeline		
* Page Type		* Object Name		
Record Page	-	Account		-



- · Label: Here user can set the title for the config of the component
- Name: The API name of the label is shown here
- **Page Type:** Here user can select page type as record page or non-record page; depending on which page the user wants to show the component
- **Non-Record Page:** By choosing the non-record page user can use this config on the home page and app page
- **Record Page:** By choosing the record page user can use this config on a related record object
- **Object Name:** Here user can choose any object on which that created config will be shown

Here are the details around different attributes, and which valid information can be input for the same.

- Attributes:
 - * **Record Object:** The object name is auto-populated here as you select the object at the time of config creation.
 - * **Record To Preview:** This feature helps you preview and evaluate the related list's appearance according to the selected record.

Attributes	
Record Object 🚯	
Account	•
Record To Preview 🕚 🗸	
Select Record To Preview	Q
Burlington Textiles Corp of America	
Perry Landstone Communications	
Sample Account for Entitlements	
sForce	
GenePoint	

Figure 127: Record to Preview Config

* **Related Object:** This is an array type where we can configure activity details for different objects, as we can see multiple activities of different objects on a single timeline, once clicked, we will have the following things to configure:

Related Object 🕕]
⊕ ←	
No Related Object	

Figure 128: Related Object Config

• **Child relationship:** The "Child relationship" field allows you to choose the child object you want to display in the related list.



Designer			
	New	Activity	
Child Relationship 🚯 🤟		* Object Name 🛛 🚯	
Select Child Relationship	*	Select Object Name	•
ChildAccounts	î	*Sub Header	ŵ
ChildAccounts > ChildAccounts	, in the second s	Owner Field	÷
ChildAccounts > ChildAccounts > ChildAccounts		Select Field	•
ChildAccounts > ChildAccounts > AccountBrands Select Field			
Addtional Fields		Filter Criteria	
Search Field	Q	Evaluation Criteria	
		All Conditions Are Met All Condition	ן רך
· · · · · · · · · · · · · · · · · · ·		Cancel	Add

Figure 129: Child Relationship Config

- **Object Name:** Selected child relationship object name will be auto-populated here in read-only format. If no child relationship object is selected, then by default, the record object is auto-populated in this field, or else here you have to choose an object.
- * Merge Text: When user clicks on the gear icon of the header and Sub Header then,
 - For the Activity Timeline, the user requires functionality that merges the text and displays the merged values.
 - This will be a collection of property binders that will allow a user to use multiple property binder values along with some static ones.
 - To provide the sub header and header user will need this merge text component because sub header contains some static text and some dynamic text which changes according to records.
- * **Header:** We can use merge text for the Header, we can add static text along with some values from the field, we can use merge text component to create a custom text for the header, also we can see if we can make the whole header as a hyperlink of the record whose details are being shown

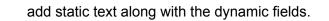
ents Designer	×
nei Ne	ew Activity
Child Relationship Opportunities	*Object Name Opportunity
	* Sub Header
	Owner Field{ Opportunity } Select Field
occer not	
Additional Field Q Search Field Q Campaign > Close Date	
	Cancel Add

Figure 130: Header Config

	New Activity	×
	Merge Text	
* Field Source		
Record Field		•
* Field { Opportunity }		
Name		•
Merge Field Expression		
{Record Field>Name}		+ 0
*Merge Text		
{Record Field>Name}		
		Cancel Save

Figure 131: Merge text

* Sub header: User can use merge text for the sub header so that the user can



nts	Designer		×
e	New	Activity	
	Child Relationship Opportunities	*Object Name ① Opportunity	Î
	*Header • {Record Field>Name} •	*Sub Header 0	
li	Date Field (Opportunity) Select Field	Select Field	l
	Status Field{ Opportunity } Select Field	0	
	Addtional Field Q Search Field Q Account > CAmount Campaign > Close Date	Filter Criteria Evaluation Criteria All Conditions Are Met Add Condition Remove All	Ţ
		Cancel Add	

Figure 132: Sub Header Config

	New Activity	×
	Merge Text	
Field Source		
Record Field		•
* Field { Opportunity } 🚯		
Stage		•
lerge Field Expression		
{Record Field>StageName}		+ 0
Merge Text		
{Record Field>StageName}		
		Cancel Save 8
	Figure 133: Merge text	
	89	

Œ

* **Date Field:** This is the field that will be used to order the records on the Timeline, if we consider the example of Case as a source object and from it if we select the date field as a close date then the records in the timeline will be sorted using the close date field only.

nts Designer				×
e1	Ν	lew	Activity	
Child Relationship () Opportunities		•	Object Name Opportunity	Î
* Header ① {Record Field>Name}		¢	*Sub Header (Record Field>StageName)	
*Date Field{ Opportunity }		•	Owner Field{ Opportunity } Select Field	
Account > Account ID		Î	Icon Filter Criteria	
Campaign > Campaign ID		-	Evaluation Criteria	
बि Account > बि Campaign >	Close Date	Î	+ Add Condition Remove All	-
			Cancel Add	

Figure 134: Date Field Config

- * Owner Field: Users need to map one field from the source object that will be used to show who owns the activity, if we consider the same example of the case then we will map the case owner field to this one so we will be able to see that who was the owner of the case directly in the timeline
- * **Status:** Users need to map one status field from the source object so that it will be displayed on the timeline.
- * **Icon:** This is the field that will decide which icon needs to be shown for each activity in the timeline

90



Select Icon																						
Category Search Icon Size																						
Stan	dard					•		Q Sea	rch						Me	edium					*]
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Figure 135: Icon Config

* Additional Fields: Users need to show some fields when user expand the activity to provide more details about the activity from the record, we will use our field selector which will allow us to select the field of the source object and its upward parent objects up to 3 levels.

	New Activity	
tus Field{ Opportunity } Select Field dtional Fields Search Field Campaign Close Date Closed Selected Fields No Fields Selected	C C Criteria C Criteria All Condition Are Met	Remove All
		Cancel Add

Figure 136: Additional Fields Config



- * Filter Criteria: The "Filter Criteria" section allows users to customize the display of the timeline based on specific criteria.
 - Evaluation Criteria: This will have three options, The first one is "All Conditions Are Met" which means it works as an AND operator. The second one is "Custom Logic Is Met" where we can give custom logic like (1 AND 2) OR 3 and the third one will be "Any Condition Is Met" which works as an OR operator

nts Designer			×
ents Designer	•	Activity	
Close Date X Amount X		Cancel	Ţ
	-		

Figure 137: Evaluation Criteria Config

User will have two buttons one is Add Condition which is used to provide a condition, once clicked the UI will open to add a condition, another button is Remove All which will remove all the applied conditions

- **Field** When the user clicks on the field section, the user will see the list of fields from the source field and then the user can walk to the parent records up to 3 levels and can select any field to give condition.
- **Operator** In Operator user will have options like the following- Equals, Not Equals, Contains, Does Not Contains, Starts With, Ends With.
- Field Source In this user will have two options Static and Record Field, when the user selects static, one more text box will open to select static values and when the user selects Record Field, then the user will have a source fields and also user can walk through up to 3 levels from there and it will fetch the value from that field to validate.
- Show Age: This will be a checkbox type, and this will show the relative time as 2 days ago.



Show Age 🔹	→ ‡
Hide Datetime 🕚	ŵ
Expand All 🚯	¢

Figure 138: Show Age Config

erator		31/8/2023	Burlingto	n Texti
	Show Age Configuration			t C
* Value Source 🕚				
Static			•	ne :
* Value Type 🚯				n 0
Checkbox			*	
Value	-			
		Cancel	Save	0
			Expand All	0

Figure 139: Show Age Value

 Hide Datetime: In Timeline user uses one field which will be mapped to the date field, this field derives the sorting of activities in the timeline, this hide option will be of checkbox type that will confirm if the user wants to show that date & Time on a timeline or not by default this will be Unchecked.



erator	31/8/202:	3	Burlingto	\sim
	Hide Datetime Configuration			t O
	Value Source () Static		•	ne :
	* Value Type Checkbox		•	n O
	Value			
		Cancel	Save Expand All	0

Figure 140: Hide date time config

* **Expand All:** This option will allow users to expand all the activities and collapse all activities, after refreshing the page this will go away to the original config.

erator		31/8/2023	Burlingt	ton Texti
	Expand All Configuration			t 🖸
	Value Source 🕕			
	Static		•	ne:
	Value Type 🔹			n 0
	Checkbox			
	Value			
L		Cancel	Save	0
			Expand All	0

Figure 141: Expand All config

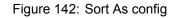
* Sort As: User can sort the records using the date field only because the timeline is based on the date field, so the user can sort from OldestDateFirst and NewestDateFirst, as per the name when a user says oldest first then it will be sort in ascending order and newest first means it will be ordered in descending order if user don't give anything then by default it will be selected as Newest-

Æ



DateFirst.

Expand All 🚯	¢	
Sort As 👩 🗸		
Newest First	•	
Newest First Oldest First		



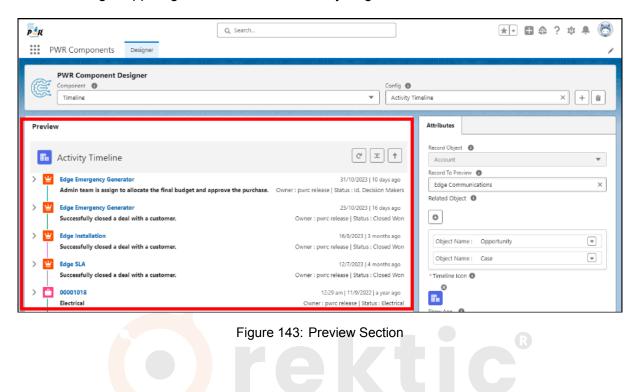
- * **Refresh:** This will be an option to refresh the component and whatever changes we applied to our component on runtime will be reversed back as per config like filters and sorting.
- * Show Search: There are many chances that the user doesn't apply filters for objects, so the timeline might have too many records combining all objects to show, so the user needs to have a setting to fetch the records and show it on a timeline, so when user clicks on show more button than next records including current records on a timeline will show.

After clicking on the Save button the config will get saved on the component config object and the user can view this button on the Record page, App page, Home Page, Flows, and Community.



- Preview Section:

After the user has selected and filled the fields according to their requirements, they can preview the components in the Preview section before saving them on the Record Page, App Page, Flows, and Community Page.



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* PWR Timeline on Record Page:

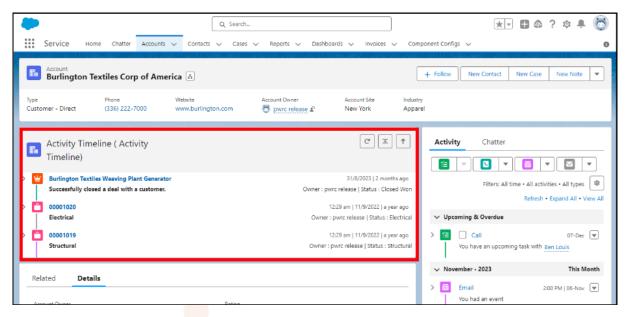


Figure 144: PWR Timeline on Record Page

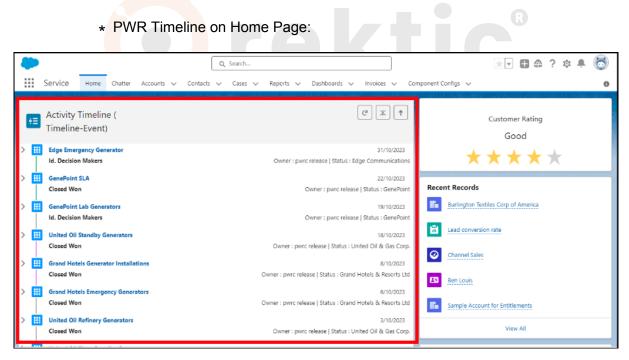


Figure 145: PWR Timeline on Home Page

V.IV Steps To Configure the PWR Components on the Record Page, Home Page, and Flows:

Select where to Configure the Required Component: User need to select where they
want to configure or show the required/ any Component, i.e. if they want it on the
Home Page or Record Page of an Object. If they want to Configure/ show the Component on the Home Page or App Page or Record Page, then they must select it from
the Lightning App Builder

+	🔲 Lightning App Builder	Pages	✓ Home Page Default						
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Comp	ponents		Quarterly Performence	٦	Customer Rating	Page			
Q	Search	\$ -	closez ₹18,20,000 cress(+3mi) ₹2,70,000 cost ≠		Good ★ ★ ★ ★ ★	* Label Home Page Default			
	Visualforce		N (N		Recent Records	* API Name			
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	omponents available.		e Di Priv Couri Couri	DN: Eliand + Open (r 1970)	E Ben Louis	 Page Type Home Page 			
~ (Custom - Managed (6)	71	Today's Events	See by Not Room Active, V Q. Seach Histord.	Sergie Account for Britisments Value All	Template			
	PWR Button Group		A CONTA		Assistant	Standard Home Page	Change		
	PWR Icon PWR Progress Bar		Looks like you're free and clear the rest of the day. Very Calendar		A CAL	Description			
	PWR Rating PWR Related List				telfting next; yne allerten nyfe now c'hest laak lake. Tedayte Taale		li		
	PWR Timeline			No bookmarks? You're missing out! Boknark ustulpets and the will boome a handy refusees for Very	AR THE				
	Get more on the AppExchang	e		Key Deals - Recent Opportunities (7 +	Noting due today, Se e ps getter, and dwelch back seen. Very AB				

Figure 146: Edit Lightning Page

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	Edit Screen		
Components lields	buttonGroupAction	Screen Properties	
Search components Q		screen1 (screen1)	
Custom (6)	Record ID from record page -> (irecordid) account name ->	> Configure Header	
PWR Icon PWR Progress Bar	(laccountName)	> Configure Footer	
PWR Rating PWR Related List	Pause Previous Finish		
Get more on the AppExchange			
		Cancel Done	
- x [*] +			

Figure 147: Edit Flow Page

 Drag and Drop the Component: Now users will have to Drag and Drop the required Component from the Custom Components section of the list of Components on the section according to their requirements.

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c	Get more on the AppExchang	e		Most Re	ont Activity 😺 🔍 Search this fee		Nathing due today. Be a go getter, and check back scen. View All	v	

Figure 148: Drag and drop component

- Select Config: Once they have Dragged and Dropped the Component on the Page, they have to Select a Config name for that Component, if the User has selected the Home-Page or App-Page they can only see or select the Non-Record Page Config, but if they have selected Record-Page of an Object, then they can see and select Configs of all record page configs as well as non-record page configs.
- Save the Page: Now User has to save the Page so that the changes and the components they have added are saved and can be viewed on the specific Pages.



← 🖬 Lightnin	vg App Builder	쀁 Pages 🗸	- Home	Page Default							_	? Help
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Components			Invoice All Invoice 7 Recents			a	Search	New C Y	Customer Rating Good	Ì	Page > PWR Related List	
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 Custom (0) No components ava 	alabla		N 0000	34/10/2028 34/10/2028	6000		Panding Completed Prov. 1 N	e at y	Burlington Totelles Corp.of America		Filters	
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Get more or	n the AppExchang)e				ny aut Recont Activity 👻	9, Search this he	d@	Nothing due tasky, Be e go getter, and check back soon. Verw AB			

Figure 149: Save

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			Edit Screen		
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	PWR Related List Get more on the App	_	Penous Prenous	Record ID from record page -> (recordid) account name -> Cancel Done	
_	<u>*</u> +				

Figure 150: Save



VI Contact Us

For more information visit www.orektic.com

You can also schedule a product demo to know more about **PWR Forms** simply by filling out the form <u>here</u>.

If you have any concerns or queries then please contact us at support@orektic.com



