Getting around Modules

Consider a newly created text field, **Suffix**, in the Financial Account Role object in Salesforce.

Below steps enlist how to add **Suffix** to the NAO screen, how to control some UI level rules around it and how to connect field level and screen level values of **Suffix.**

Defining the field

Module	nao_nfs_owner_individual	
Fields		
Name	UI Component	Options
suffix	sk-inputText	

Depending on the scenario, different Modules worksheets are to be updated.

For an Individual role and given NF is the Custodian in question, **NFS Owner Individual** worksheet is to be updated. Update as above.

Click here for more. Refer to section **Module's sheet Field section**

Adding field to the layout

Layout					
Type	Label	Visibility Condition	Validation Conditions	Reference	Mandatory
Page	Personal Information				
Section	Section 1				
Field	Suffix	SKISNOTBLANK(model.text_2)	SKIF(SKAND(SKISNO TBLANK(model.suffix), SKLENGTH(model.suff ix) > 2), "Suffix length should not be more than 2		TRUE

To add the field **Suffix** to a new section **Primary Details** of the *Personal Information* screen, define as above in the table present on the RHS of the sheet.

Click here for more. Refer to section **Module's sheet Layout section**

Add custom Validations

Layout					
Type	Label	Visibility Condition	Validation Conditions	Reference	Mandatory
Page	Personal				
Section	Primary Details				
Field	Suffix	SKISNOTBLANK(model.text_2)	SKIF(SKAND(SKISNOTBLANK(model.suffix), SKLENGTH(model.suffix) > 2), "Suffix length should not be more than 2 characters",null)	suffix	TRUE

To throw a custom validation message if the Advisor enters more than 2 characters in **Suffix**, **Validation Conditions** column is to be updated as above.

To make **Suffix** mandatory or required on the UI, **Mandatory** column is set to TRUE.

Add Visibility Conditions

To make **Suffix** visible on the screen only if another field **Prefix** is not blank, **Visiblity Conditions** column is to be updated as above.

Other features that can be controlled in Modules

To call a custom script(defined in the Connector spreadsheet in a separate tab) onchange,on new,on search, on add columns can be updated with the name of custom script.

Read-Only column is used to make the field Read Only on the UI. Help-text enables giving a custom text on hovering over the field.

Update the Query Fields Worksheet

Configuration Name	query_fields	
name	field_list	
Name	Field List	
Financial Account	id, Name, SkienceFinSln__Account_Type__c, SkienceFinSln__Agency_Code__c, Skie
Suitability	SkienceFinSln__Capital_Preservation_Rank__c,Id,SkienceFinSln__Income_Rank__
Financial Account Role	id, text_1__c, suffix__c

For Salesforce fields to be used and referenced in the digital platform, we need them to be queried from the Salesforce database. The exhaustive list of queries are stored in the Query Fields tab in the **Configurations** spreadsheet.

Add **Suffix** to the Financial Account Role query.

Connectors

So far, **Suffix** has been added to the Financial Account Role query in the Configurations sheet and to the appropriate layout in the Modules sheet.some custom UI level rules around **Suffix** has also been adjusted.

What connects what we see on NAO screen and the Salesforce schema? Connectors!

Saving value from NAO screen into Salesforce field

Name	mapNAOOwnerNF	
Type	Mapper	
Condition		
Condition	Target Field	Value
faRole.suffix__c		owner.nao_nf_owner_individual.suffix
faRole.text_1__c		owner.nao_nf_owner_individual.text_1

To save the value enters by the Advisor in the Suffix field on the screen into the Suffix field on Financial Account Role, a Connector needs to be updated.

Based on the scenario, different Connector sheets are to be updated.

To save from NAO to FAR and given NF is the custodian in question, we will need to look at the **mapNAOOwnerNF** tab.

By **spurthy.prabhakar**
cheatography.com/spurthy-prabhakar/

Not published yet.
Last updated 12th June, 2020.
Page 1 of 2.

Sponsored by **CrosswordCheats.com**
Learn to solve cryptic crosswords!
http://crosswordcheats.com

Loading the value from SF field into NAO screen

Name	mapFARoleToNAOPershing	
Type	Mapper	
Condition		
Condition	Target Field	Value
	owner_nao_nf_owner_individual.suffix	faRole.suffix__c
	owner_nao_nf_owner_individual.text_1	faRole.text_1__c

To load the field level value back to the NAO screen on edit of FA, a (reverse) Connector needs to be updated.

To load from FAR suffix field to NAO and given NF is the custodian in question, we will need to look at the **mapFARoleToNAONF** tab.

Prefilling values from Contact on Load of NAO

This requires update of a connector sheet to map values from the underlying Contact record associated with the role into the screen when NAO loads.

Given NF is the custodian in question, MapOwnerModulesNF is the sheet to be updated to prefill **Suffix** from Contact.

More about Connectors

Click here to gain a deeper understanding on Connectors

A Note about Modules worksheets

Based on which screen you want the field in, different Modules sheets are to be updated..

For Account Instructions/Account Details screens and given NF is the custodian in question, **NFS NAO** worksheet is to be updated.

A Note about Built-In functions

SKIF, SKAND, etc. are SKDP defined built-in functions. Refer to the Built-in spreadsheet in the google folder To see the exhaustive list of SKDP built-in functions and what each of them does.Your own built-in functions can be written on separate worksheets of the Built-In spreadsheet if your implementation demands it.

A Note on Picklists tab of Modules

If Suffix were a picklist field with values Mr., Mrs. and Miss, these picklist values would be defined in the Picklists sheet.

Click here and refer to section **Module's Sheet picklist**

Note on Saving to JSON versus Discrete Field

Which Connector to update when also depends on whether the screen value is being saved into/loaded from the actual field or from the Json Long Text field present in the object.

Note on Orchestrations

Orchestrations are a collection of Modules.

Orchestrations are updated at the beginning of each impementation to bring up a bundle of screens specific to the product company.

If any new screen is to be added, the orchestrations will have to be updated with the newly added screen.

More about Orchestrations sheet

Note on Components

Components sheet defines all the UI components used in Modules. Eg: sk-inputtext.

Our own Components can be defined if our implementation demands it.