

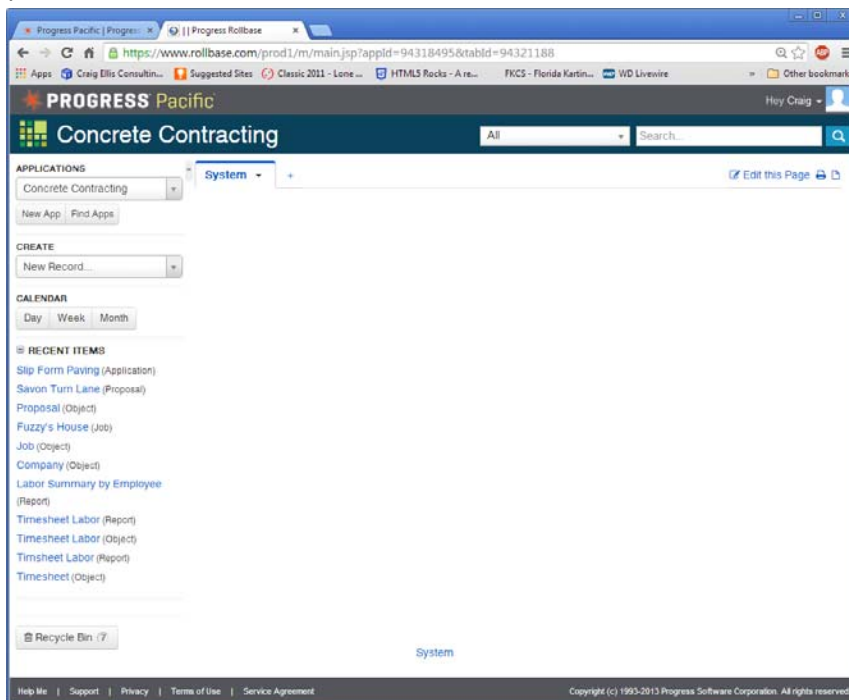
Company Object

Creating and populating the Company Object

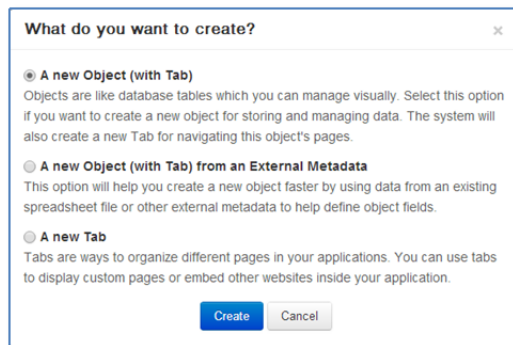
The company object represents the main entity in the entire system. In this instance, that will represent our client Tinchter Concrete Construction. There will be only one company in this application, but the application can certainly contain multiple companies, and all instances underneath that top object can be related to a particular company.

Creating the Company Tab and Object

If you have not already created your system tab, please refer to the prior instructions. If you have, then you should see the screen below:



Click the + symbol to the right of the system tab and you'll see the following screen:



We will select the first option to create both an object and a tab.

We will name our object "Company". By default, it wants to append an "s" for the plural name, but we can override that for proper spelling. For the integration name, we will be using the "cc" prefix on all of our new objects in order to truly make them identifiable as unique to our application. Notice I have turned on the Audit Trail feature for this object.

The screenshot shows the Rollbase Setup interface for creating a new object. The browser address bar shows the URL: <https://www.rollbase.com/prod1/setup/objectEdit.jsp?act=app>. The page title is "Setup" and the breadcrumb is "Application Setup > Objects > New".

Tip: Objects are like database tables that you can manage visually. They are the basic building blocks of all applications. This form walks you through the first steps of creating a new Object Definition. You can define Objects to represent any kind of business data such as a Customer, Employee, Product, Quote, Invoice, Purchase Order, Partner, Project, Meeting, Conference, Bug Report, Support Request, Help Ticket, Asset, etc.

Object: New Object

Object Properties

Define a singular and plural name for this object definition. These names will be used throughout your account to refer to one or more records of this type.

Singular Name: **Example: Project**

Plural Name: **Example: Projects**

What are Records of this object called? The Record Name field is used in pages, views, selectors, and search results that reference records of this type. Once this object has been created you can customize the display format of the Record Name field using merge fields.

Record Name: **Example: Project**

The Integration Name is used to reference this object via merge fields and the Web Services APIs. This name must be unique. Be careful when changing the Integration Name as it may affect existing templates, formulas and integrations.

Integration Name: **Example: Project**

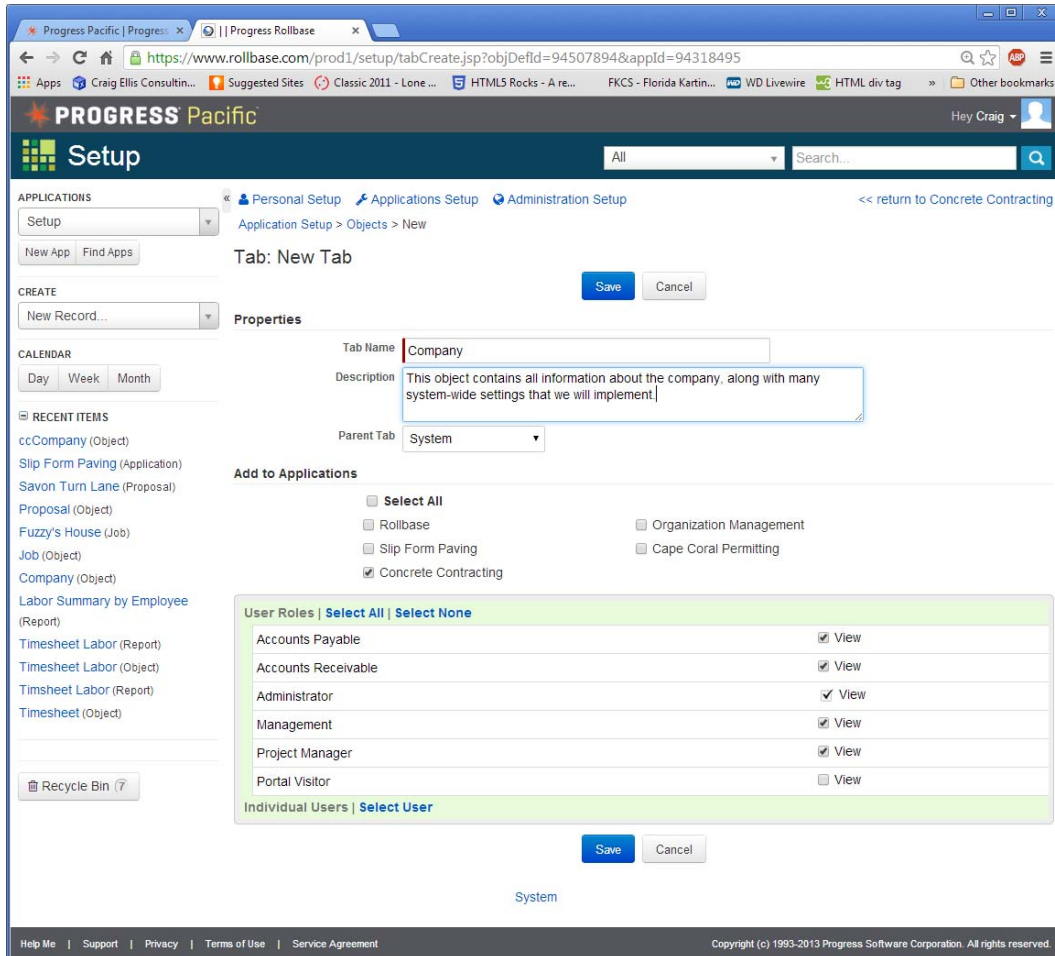
Description:

Optional Object Properties

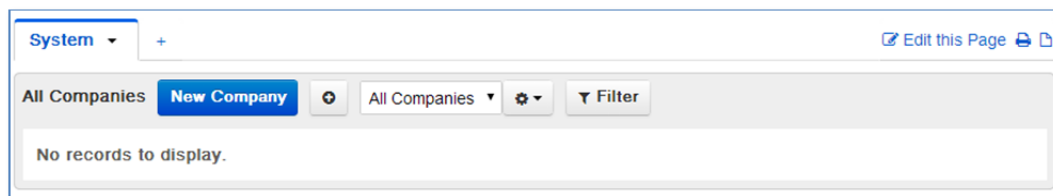
Select the appropriate properties based on how you want records of this object type to behave:

Property	Description
<input checked="" type="checkbox"/> Audit Trail	Select this option to enable creation of Audit logs when values of selected fields are changes or by invoking triggers and API. In addition create Audit logs when record is: <input checked="" type="checkbox"/> Viewed <input checked="" type="checkbox"/> Created <input checked="" type="checkbox"/> Edited <input checked="" type="checkbox"/> Deleted
<input type="checkbox"/> Flagging	Select this option if you want the ability to flag records for follow-up. Flagging applies uniquely to each user.
<input type="checkbox"/> Viewed Tracking	Select this option if you want to visually differentiate records that

After you hit the Save button, you will see the following screen. I have changed the Tab Name to “Company” from “Companies” as we only plan on using one. Also not that the parent tab is now set to “System”. Select all user roles that should be able to view this tab.



Once you hit save, you should return to the System tab, which now has an “All Companies” section.



While it is tempting to click the “New Company” at this point, we must resist the urge and now start to build out this object per our original design specification. There is more than one way to get to the object definition. If you click the down arrow on the System Tab, you will see a menu item for “Object Definition”. Alternatively, you can click the Applications drop down in the upper left hand corner and click “Setup”. From there you would click the “Objects” link in the Application Setup section.

From our design specification document, we have tentatively designed our Company object to require the following fields. We won't worry about view or relationships just yet, as we have no other objects in the system yet. The first two fields are always created by default for any new object.

Company
Integer id Text name Text address1 Text address2 Text city Picklist state Text zipCode Text signerTitle Email mainEmailAddress Phone phoneNumber Phone faxNumber Text defaultFuelCode email accountingManagerEmail email collectionManagerEmail Integer defaultLienDays Decimal defaultOverheadRate Decimal defaultProfitRate Integer defaultWarrantyYears
Relationships
Relationship Opportunity Relationship Customer Relationship Project Manager
Permissions
Permission administrators
Views
View new View edit View view

If you look at all fields in the Company object before we begin, you'll also notice that several other fields get system created.

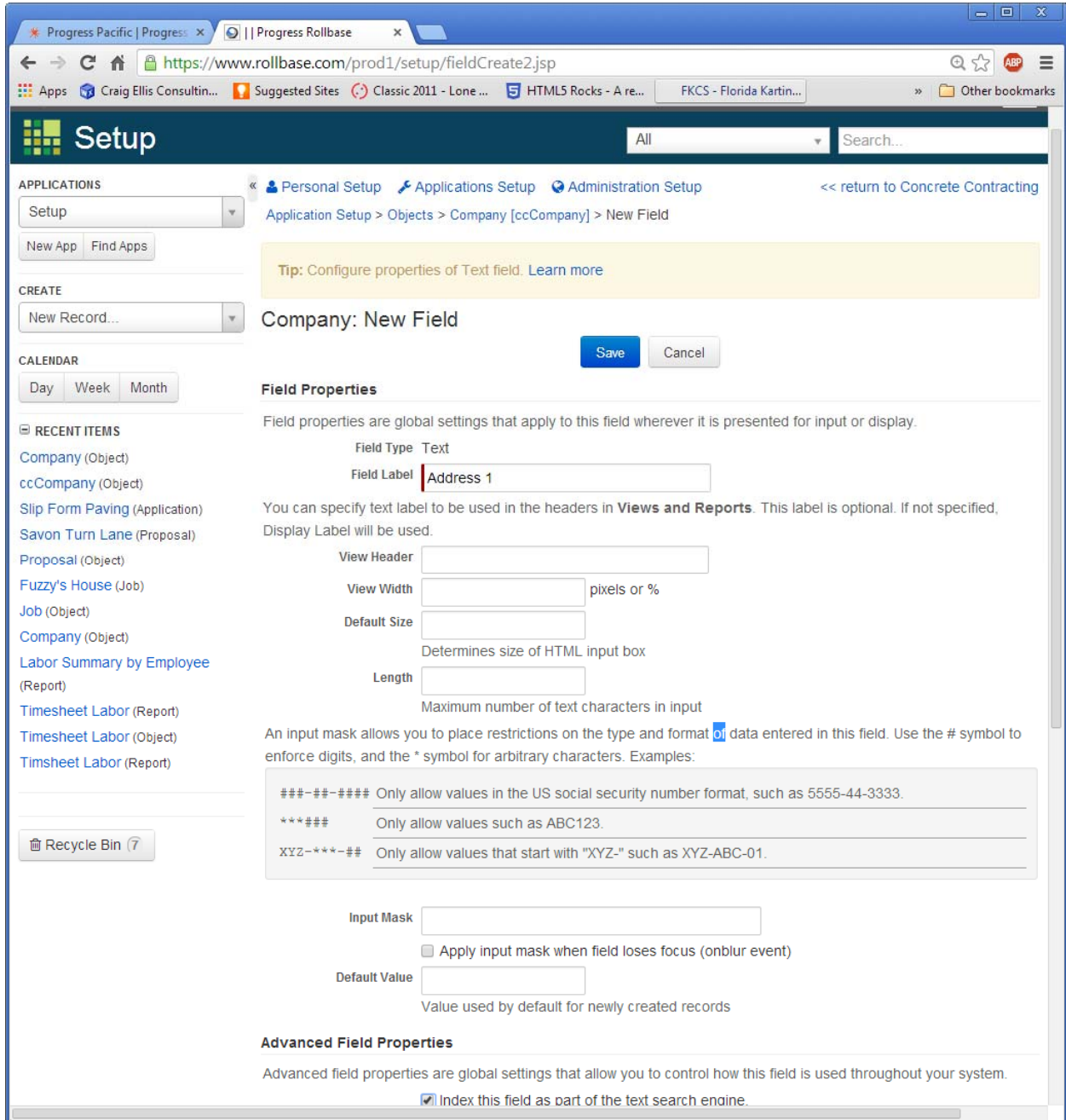
Action	Field Label ▲	Data Type	Integration Name	Def. Value	Text Index	Track Changes
Edit Events Permissions	Comments	Text Area	comment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit Validation Events Permissions	Company	Record Name	name	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit Permissions	Created At	Date/Time	createdAt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit Permissions	Created By	User Link	createdBy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit Permissions	ID	Integer	id	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit Permissions	Tags	Search Tag	tag	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit Permissions	Updated At	Date/Time	updatedAt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edit Permissions	Updated By	User Link	updatedBy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

We are going to go down the list from above and create all of the fields that we have specified. Click on the New Field button to begin. You should see the screen below. Since the first field we'll be entering is address1, we'll go ahead and leave the type as Text. Click the Next button.

The screenshot shows the 'New Field' configuration page in the Rollbase system. The page title is 'Company: New Field'. There are two buttons: 'Next >' and 'Cancel'. Below the buttons is a section titled 'Field Type' with the instruction 'Choose the type of information that this field will contain.' A table lists the available field types:

Type	Description
<input checked="" type="radio"/> Text	Users can enter any combination of characters. You can optionally define an input mask to enforce certain kinds of input.
<input type="radio"/> Text Area	Users can enter multiple lines of text. You can optionally enable a rich text editor so users can enter text as formatted HTML.
<input type="radio"/> Checkbox	Users can select a Checked (true) or Unchecked (false) value.
<input type="radio"/> Currency	Users can enter a dollar or other currency amount.
<input type="radio"/> Decimal	Users can enter any number including decimals. You can optionally define a maximum number of decimal places.
<input type="radio"/> Integer	Users can enter any number (without decimals).
<input type="radio"/> Percent	Users can enter a percentage number including decimals, % sign is automatically added.
<input type="radio"/> Date	Users can enter a date or pick a date from a calendar popup.
<input type="radio"/> Date/Time	Users can enter a date and a time, or pick a date from a

The only required information at this time is the Field Label, which we'll enter "Address 1". It is worth browsing around what's available on this screen, as you can control lots of features for this field including default values, audit trail, indexing, and so on. Please refer to Rollbase in Action for a complete listing of the features.



Once you hit save, you'll see a list of views that will contain the newly created field. You can accept the default for now, but you'll also see a "Save & New" button. We'll use that until we complete our list. Repeat this procedure for all remaining fields, save for the "State" field, as we'll talk about that one next.

The State field we have defined as type "Picklist".

Picklist

Users can select a value from a list of values defined by you.

In this Picklist field, we have populated the values with both the state name and the state abbreviation with a pipe "|" in between. Also notice that we have put a {D} in front of Florida, as Tincer Concrete is a Florida company, and nearly all work and customers are based in Florida. Additionally, we have turned on the Share As property, as we'll reuse this list for other objects that require a state.

Progress Pacific | Progress x | Progress Rollbase x

https://www.rollbase.com/prod1/setup/fieldCreate2.jsp

Apps Craig Ellis Consultin... Suggested Sites Classic 2011 - Lone... HTML5 Rocks - A re... FKCS - Florida Karti...

Hey Craig

Setup All Search...

APPLICATIONS Setup Personal Setup Applications Setup Administration Setup << return to Concrete Contracting

Application Setup > Objects > Company [ccCompany] > New Field

Tip: Configure properties of Picklist field. Learn more

Company: New Field Save Cancel

Field Properties

Field properties are global settings that apply to this field wherever it is presented for input or display.

Field Type Picklist

Field Label State

You can specify text label to be used in the headers in **Views and Reports**. This label is optional. If not specified, Display Label will be used.

View Header

View Width pixels or %

Picklists may be shared between objects.

Shared As Share as New

Enter the list of values for the picklist field below. Each value should appear on its own line.

Values

- Alabama|AL
- Alaska|AK
- Arizona|AZ
- Arkansas|AR
- California|CA
- Colorado|CO
- Connecticut|CT
- Delaware|DE
- {D}Florida|FL
- Georgia|GA
- Hawaii|HI
- Idaho|ID

You can use the "}" symbol to associate an integration code with each value (512 characters max). For example: **Accounts Receivable|AR**

Use {D} symbol to indicate value selected by default: **{D}Medium**

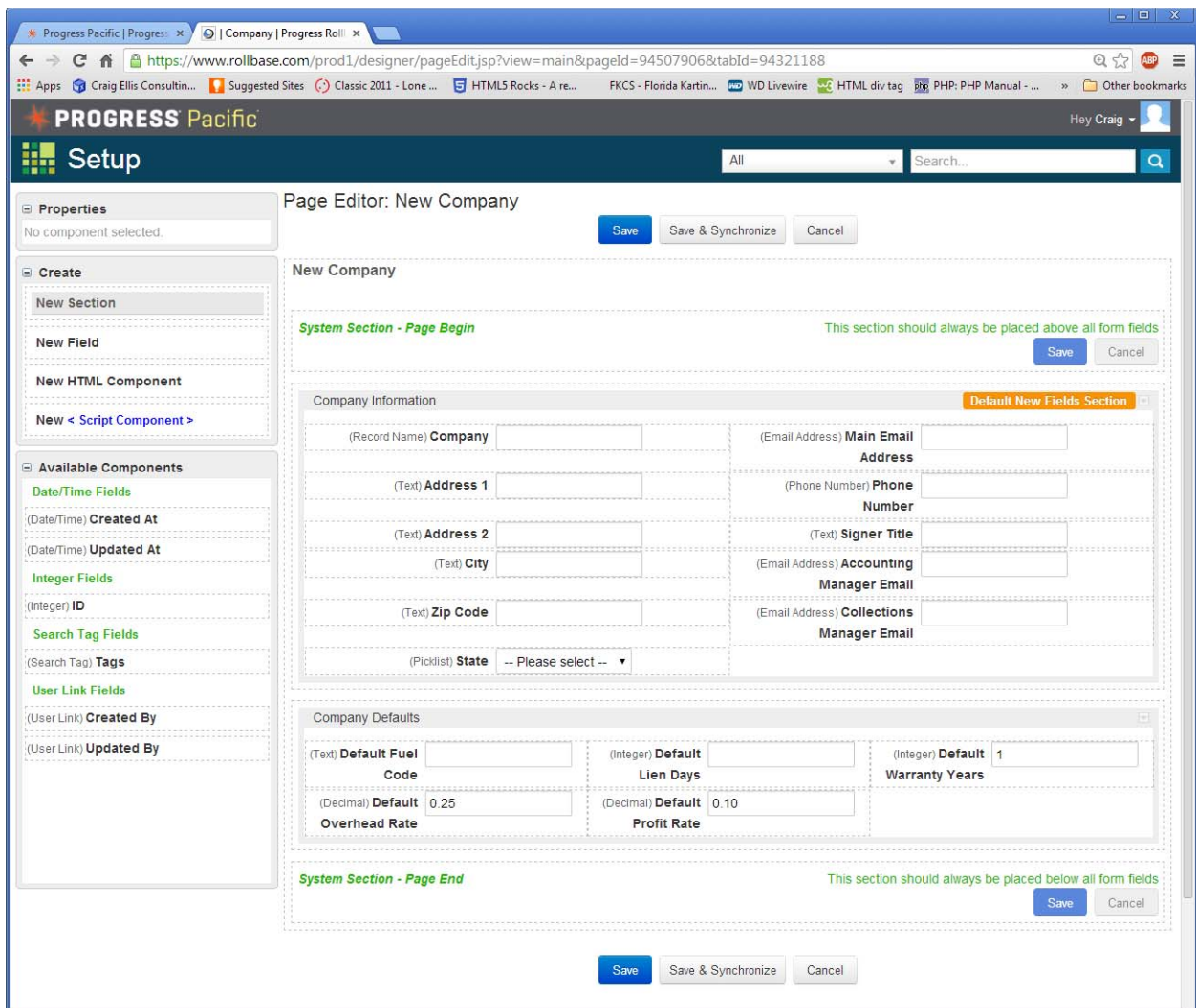
Sort values alphabetically, not in the order entered

Advanced Field Properties

Once we complete all of the fields, we can now actually create a new company. You will notice that the layout of the fields we created may not be very elegant. We can improve the look by clicking on the “Edit this Page” link in the upper right hand corner.

By default, a new screen is only 1 column wide. We can change it to 2 or 3, but for this screen, we’ll change it to 2. From there, we can drag the fields around until we are happy with the layout. In fact, we over use the word “Default” in our object design, so we’ll break those fields off into a new section called “Company Defaults”. To do this, click and drag “New Section” to the bottom of the screen until the screen turns green and lets you drop it. For our purposes, we’ll put it below the Company Information.

We have made that section have 3 columns, and from there simply drag and drop all of the default fields to the newly created section.



Because the word “Default” is redundant now, you can simply return back to the object definition screen and edit the Field Label for each default field and remove the word “Default”.

If you have done everything right, you should have a screen that looks something like this:

PROGRESS Pacific
Concrete Contracting

System

New Company

Save Save & New Cancel

Company Information

Company	Tincher Concrete Const	Main Email Address	information@tinchercon
Address 1	16900 Gator Rd	Phone Number	(239)267-7766
Address 2		Signer Title	EEO Officer
City	Fort Myers	Accounting Manager Email	andy@tincherconcrete.c
State	Florida	Collections Manager Email	eric@tincherconcrete.cc
Zip Code	33912		

Company Defaults

Fuel Code	BGS	Lien Days	90	Warranty Years	1
Overhead Rate	0.25	Profit Rate	0.10		

Save Save & New Cancel

System

I'm still not completely satisfied with the look of this screen because the content of several fields is being hidden due to the size of the box. We can correct this by changing the "Default Size" property on each field in question. Through trial and error, it appears as if a size of 30 will correct this problem.

PROGRESS Pacific
Concrete Contracting

System

New Company

Save Save & New Cancel

Company Information

Company	Tincher Concrete Construction, Inc	Main Email Address	information@tincherconcrete.com
Address 1	16900 Gator Rd	Phone Number	(239)267-7766
Address 2		Fax Number	(239)267-3532
City	Fort Myers	Signer Title	EEO Officer
State	Florida	Accounting Manager Email	andy@tincherconcrete.com
Zip Code	33912	Collections Manager Email	eric@tincherconcrete.com

Company Defaults

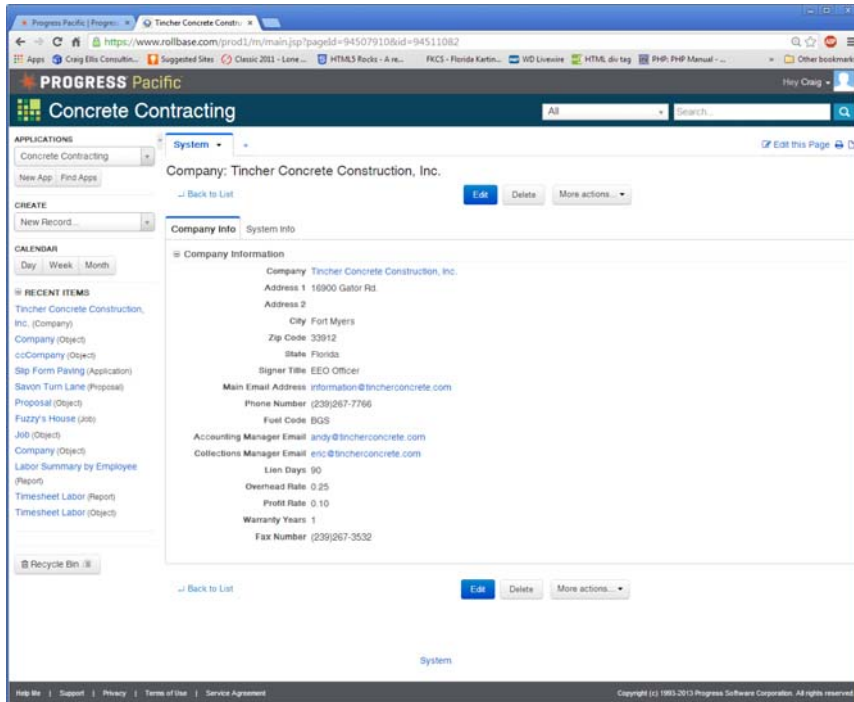
Fuel Code	BGS	Lien Days	90	Warranty Years	1
Overhead Rate	0.25	Profit Rate	0.10		

Save Save & New Cancel

System

The screen which we just edited is for “New” only. That means that “View” and “Edit” will still be single column. Edit those screens accordingly to taste.

Before



After

