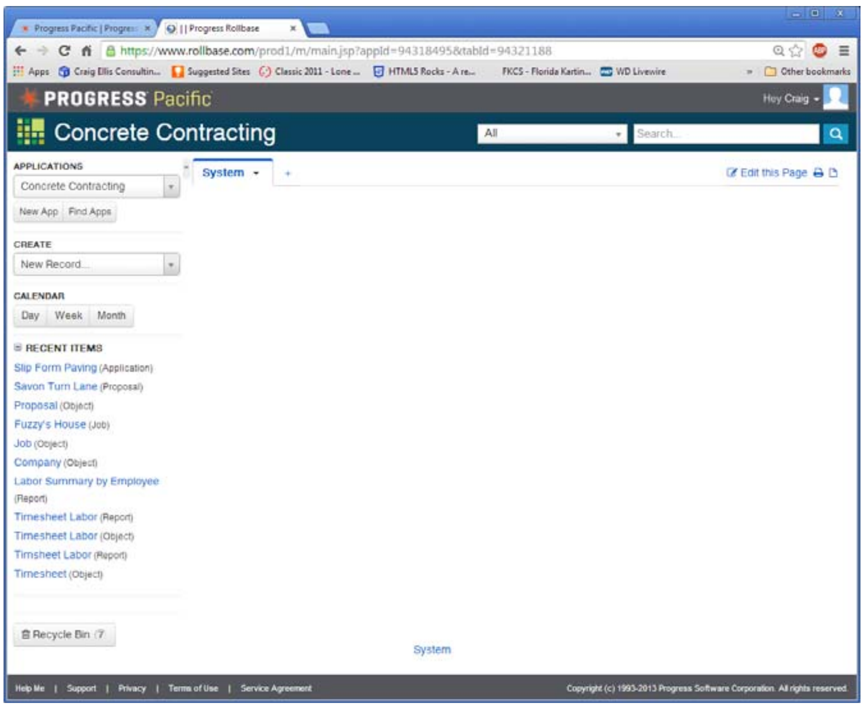
Company Object

Creating and populating the Company Object

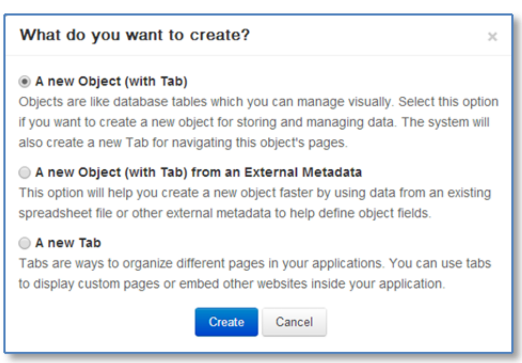
The company object represents the main entity in the entire system. In this instance, that will represent our client Tincher Concrete Construction. There will be only one company in this application, but the application can certainly contain multiple companies, and all instances underneath that top object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

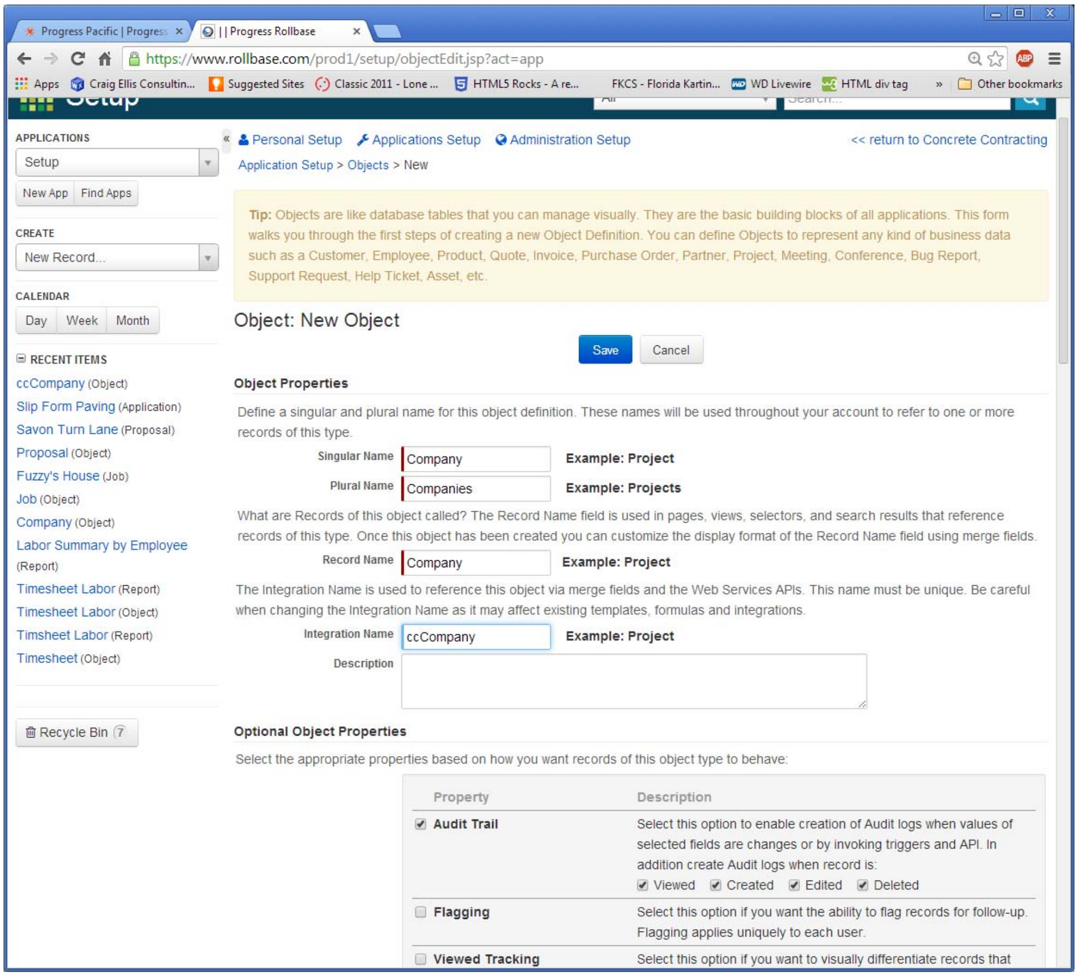


Click the + symbol to the right of the system tab and you'll see the following screen:

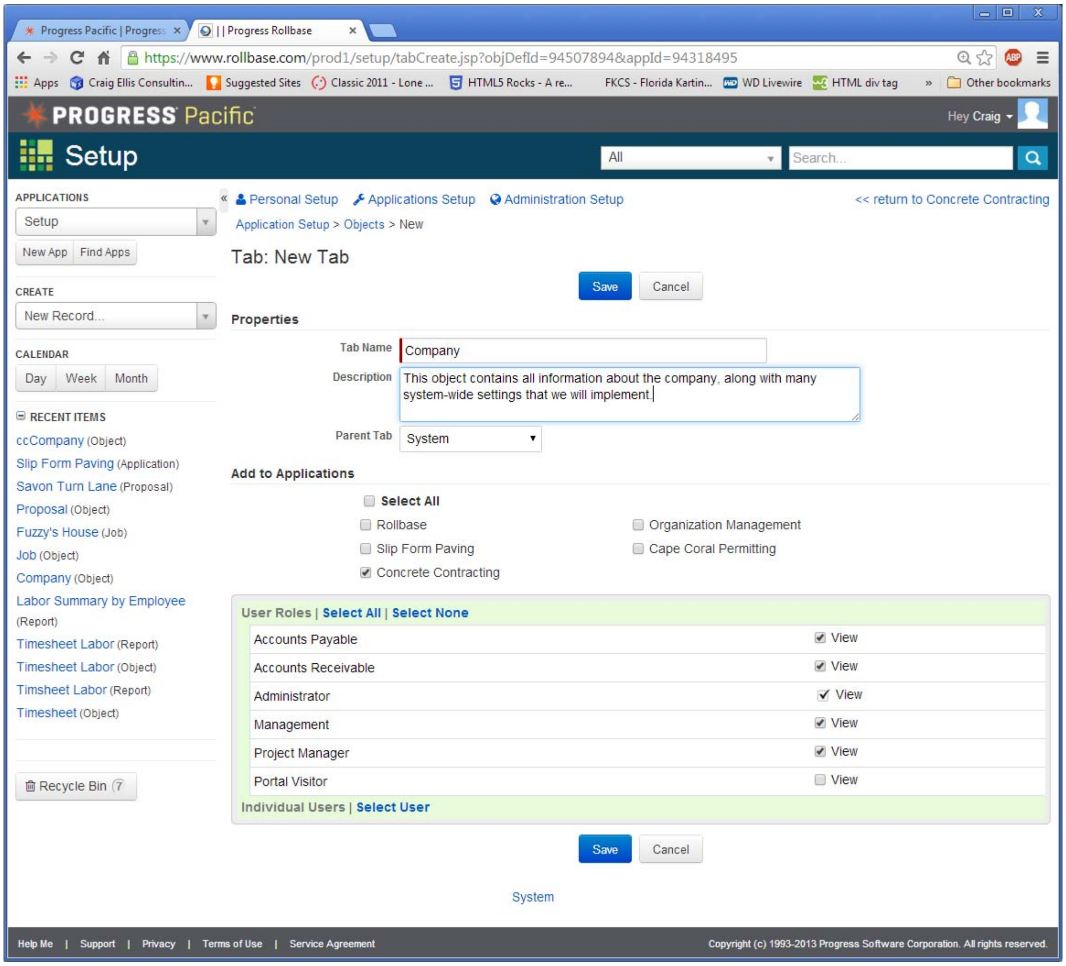


We will select the first option to create both an object and a tab.

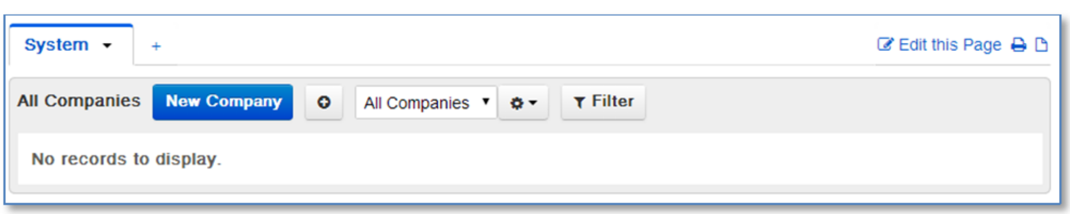
We will name our object “Company”. By default, it wants to append an “s” for the plural name, but we can override that for proper spelling. For the integration name, we will be using the “cc” prefix on all of our new objects in order to truly make them identifiable as unique to our application. Notice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



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

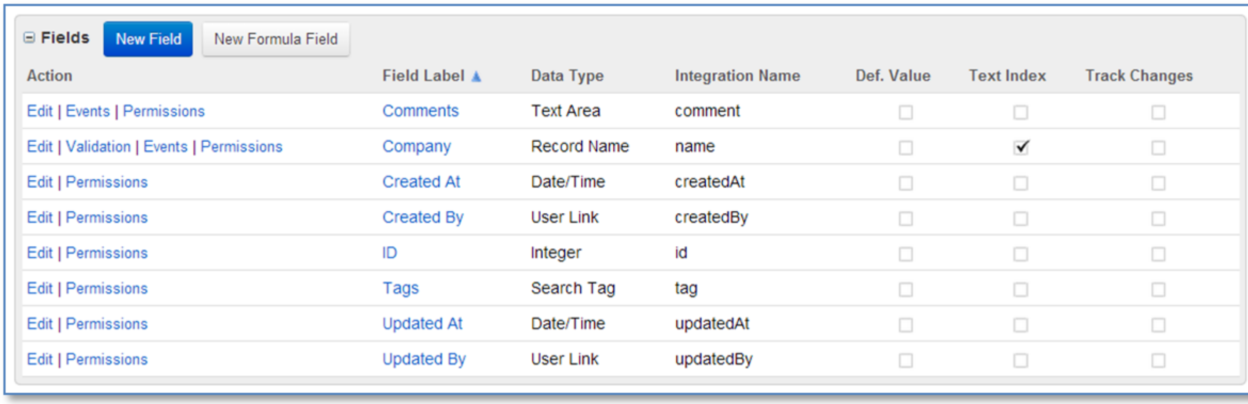
Permissions

Permission administrators

Views

View new
View edit
View view

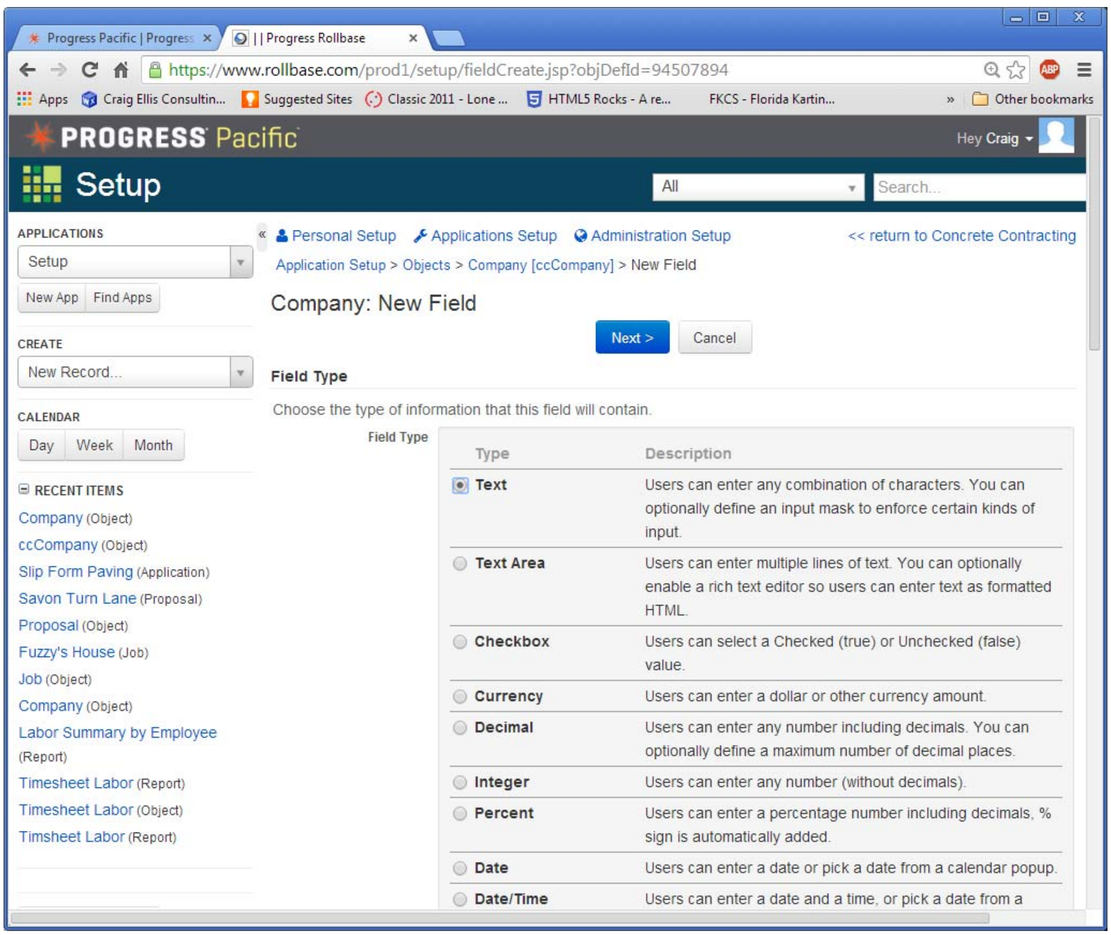
If you look at all fields in the Company object before we begin, you'll also notice that several other fields get system created.



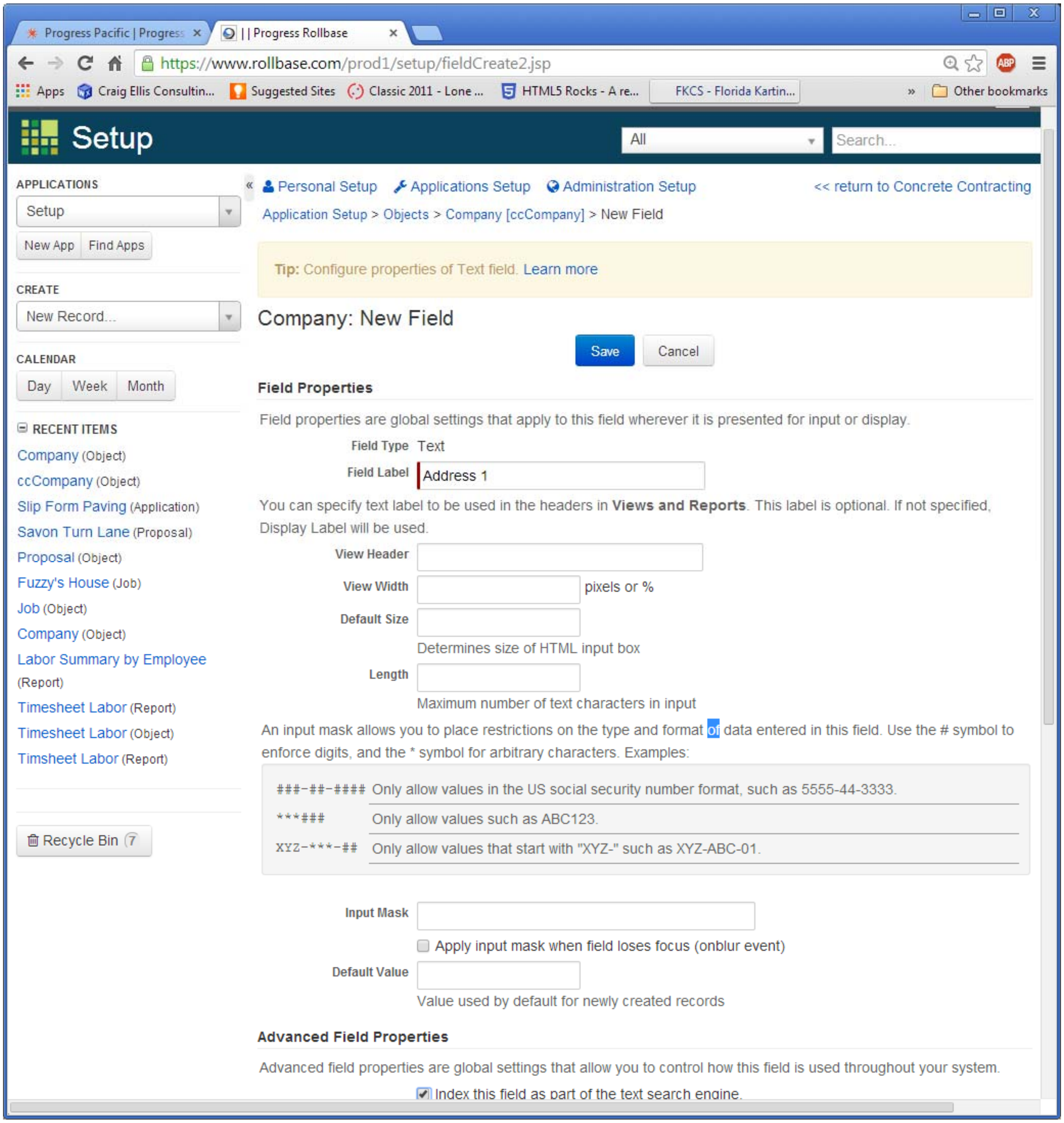
Fields New Field New Formula Field

Action	Field Label	Data Type	Integration Name	Def. Value	Text Index	Track Changes
Edit | Events | Permissions	Comments	Text Area	comment	☐	☐	☐
Edit | Validation | Events | Permissions	Company	Record Name	name	☐	✔	☐
Edit | Permissions	Created At	Date/Time	createdAt	☐	☐	☐
Edit | Permissions	Created By	User Link	createdBy	☐	☐	☐
Edit | Permissions	ID	Integer	id	☐	☐	☐
Edit | Permissions	Tags	Search Tag	tag	☐	☐	☐
Edit | Permissions	Updated At	Date/Time	updatedAt	☐	☐	☐
Edit | Permissions	Updated By	User Link	updatedBy	☐	☐	☐

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.

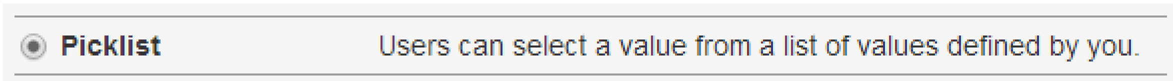


The only required information at this time is the Field Label, which we'll enter "Address 1". It is worth browsing around what's available on this screen, as you can control lots of features for this field including default values, audit trail, indexing, and so on. Please refer to Rollbase in Action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

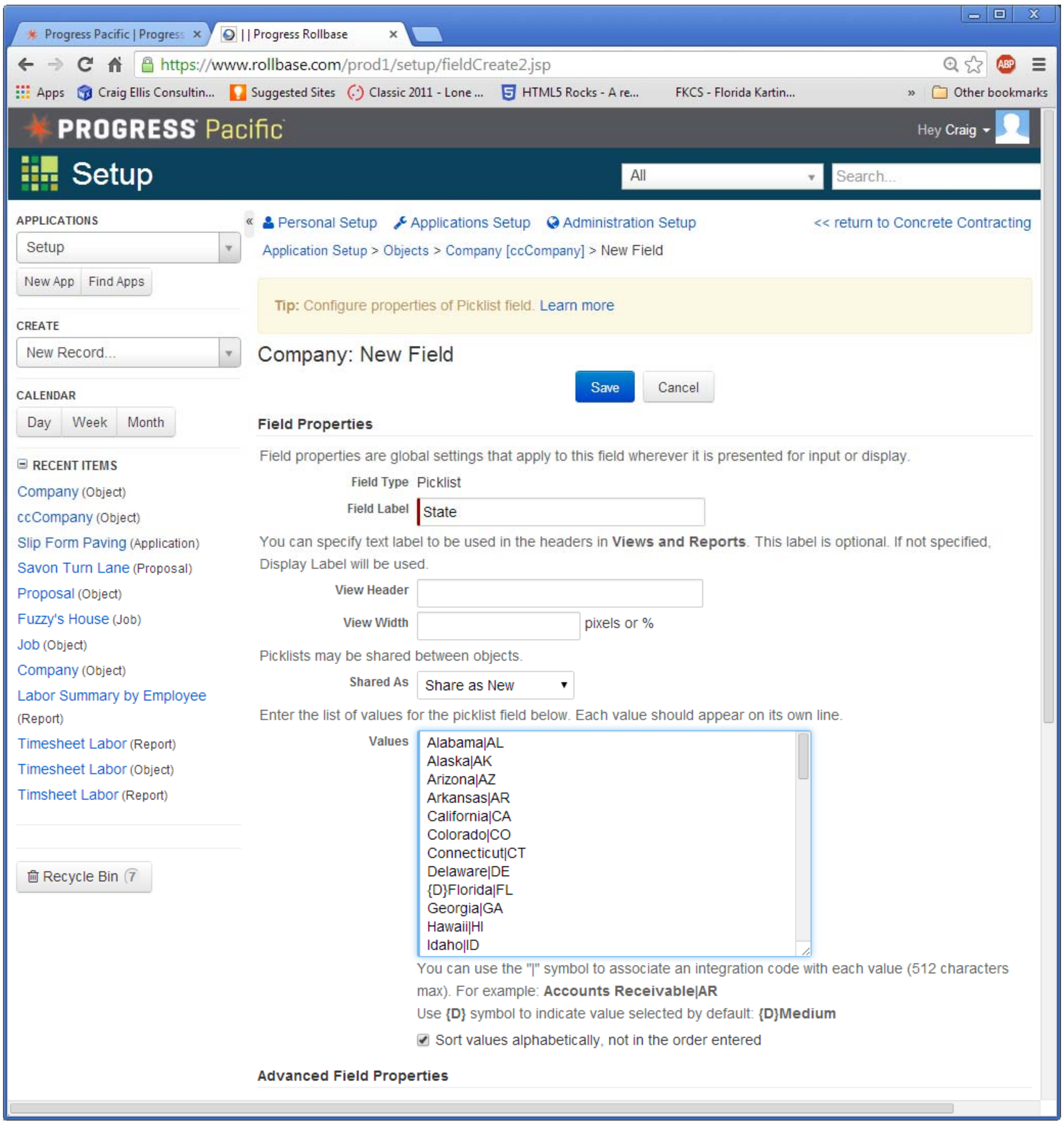


Once you hit save, you'll see a list of views that will contain the newly created field. You can accept the default for now, but you'll also see a "Save & New" button. We'll use that until we complete our list. Repeat this procedure for all remaining fields, save for the "State" field, as we'll talk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

The State field we have defined as type “Picklist”.



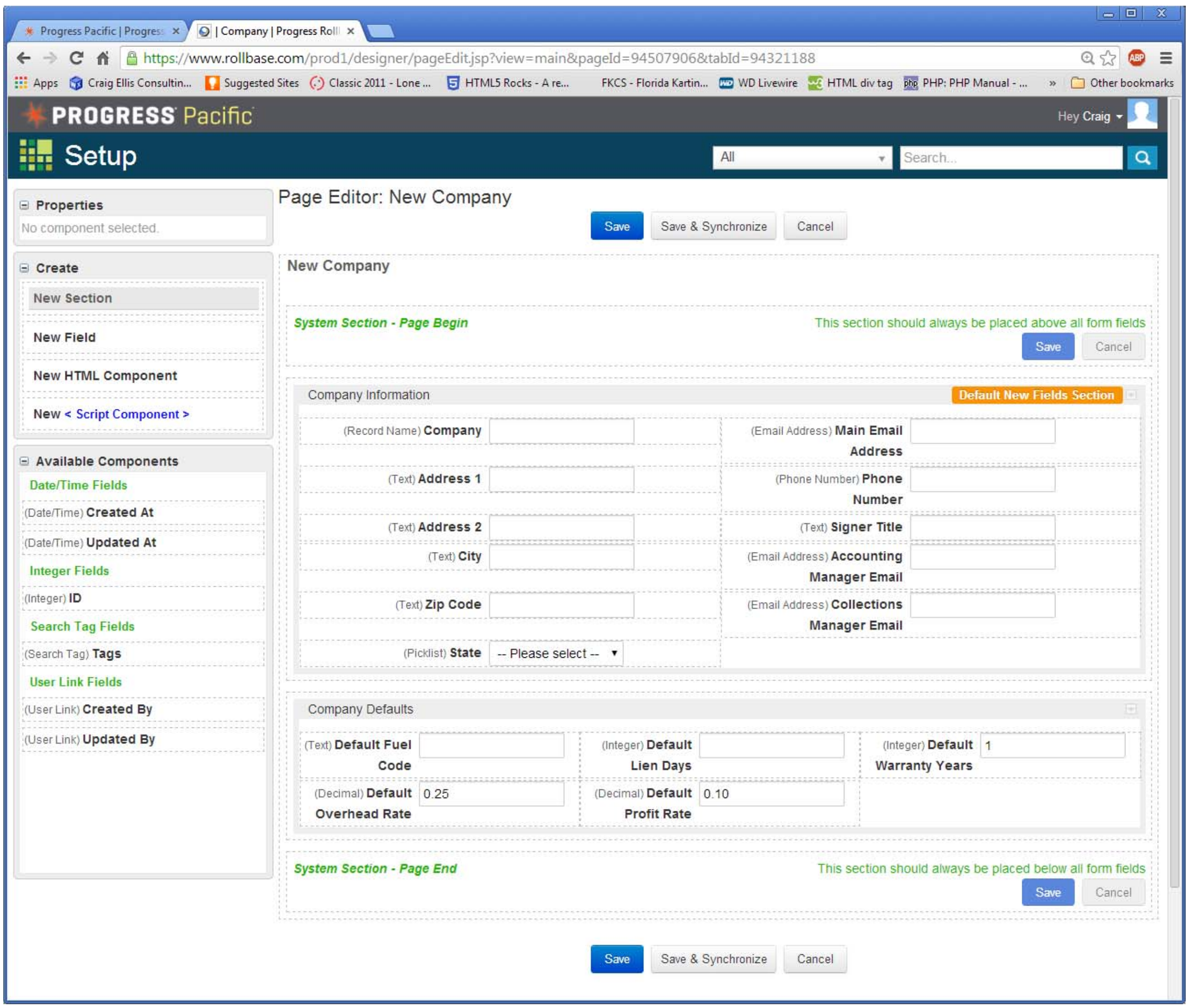
In this Picklist field, we have populated the values with both the state name and the state abbreviation with a pipe “|” in between. Also notice that we have put a {D} in front of Florida, as Tincher Concrete is a Florida company, and nearly all work and customers are based in Florida. Additionally,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



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.

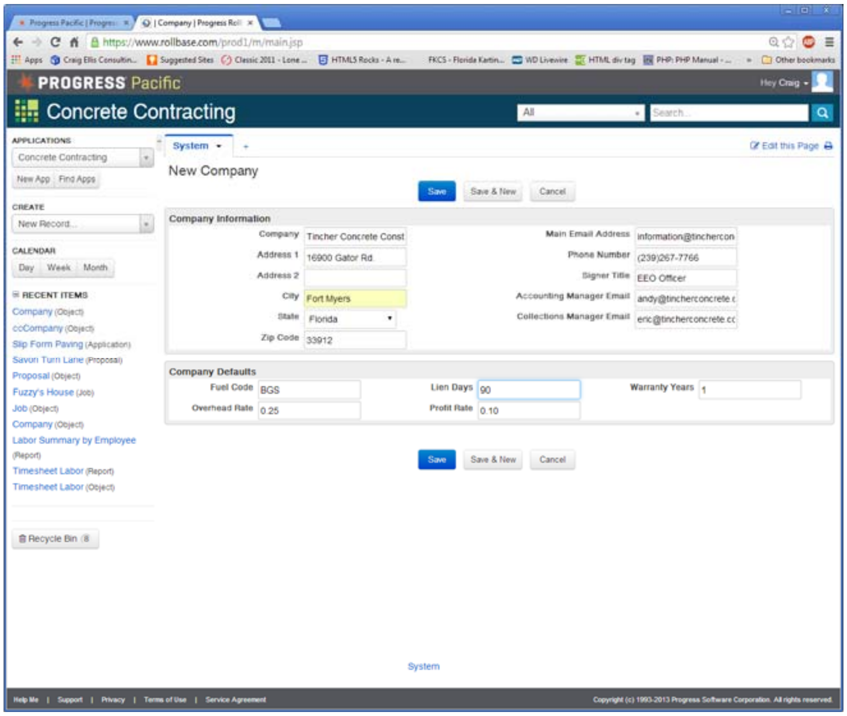
By default, a new screen is only 1 column wide. We can change it to 2 or 3, but for this screen, we'll change it to 2. From there, we can drag the fields around until we are happy with the layout. In fact, we over use the word "Default" in our object design, so we'll break those fields off into a new 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.

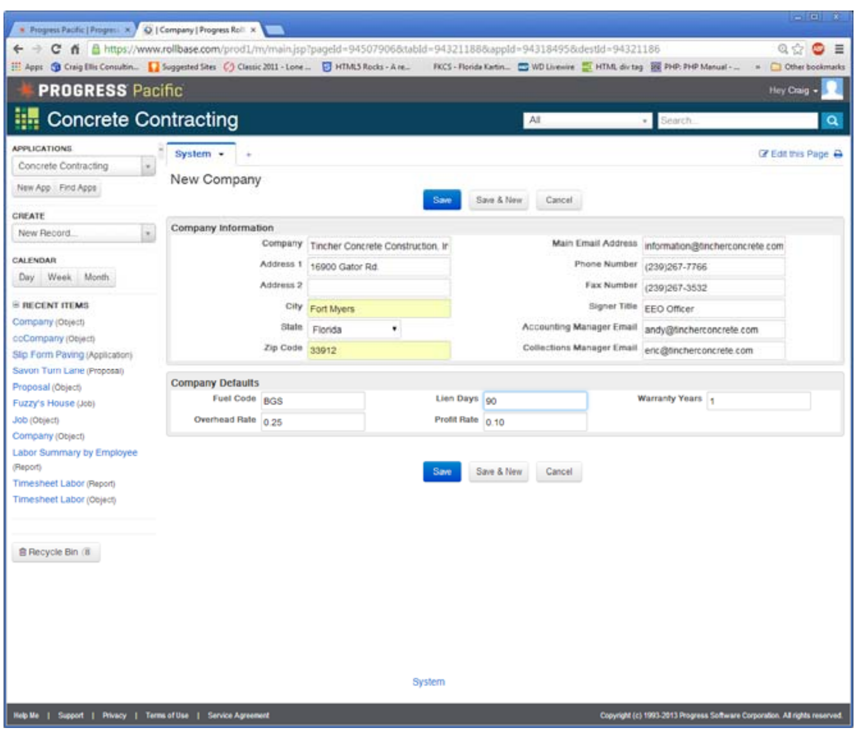


Because the word "Default" is redundant now, you can simply return back to the object definition screen and edit the Field Label for each default field and remove the word "Default".

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

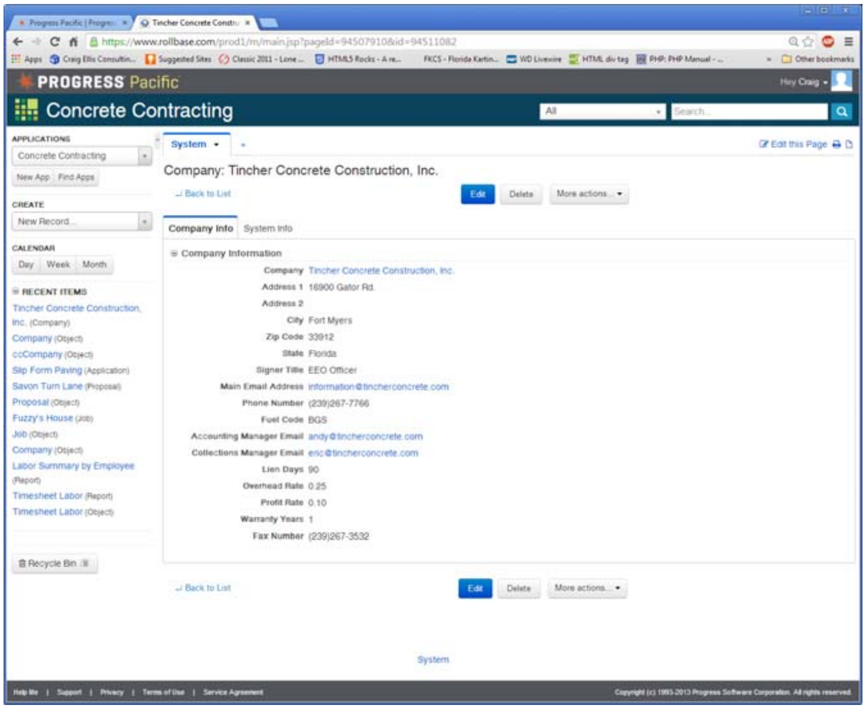


I'm still not completely satisfied with the look of this screen because the content of several fields is being hidden due to the size of the box. We can correct this by changing the "Default Size" property on each field in question. Through trial and error, it appears as if a size of 30 will correct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



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