

Contact Object

Creating and populating the Contact Object

The Contact object is will be linked to many different objects (eg. Customer, Vendor, ...). When we create this object, we're not going to create a top level menu, as we'd prefer contacts be maintainable at the parent object level.

Contacts
Integer id Text name Text address1 Text address2 Text city Picklist state Text zipCode Email emailAddress Email alternateEmailAddress Phone primaryPhoneNumber Text Area notes String title Picklist contactType
Attributes
Attribute Contact
Relationships
Relationship Customer Relationship Customer Contact Phone
Permissions
Permission all
Views
View new View edit View view

Simply create. Remember to use the cc prefix. When asked if it's a top level object, change it's parent to Customers.

Object: New Object [Save] [Cancel]

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

After the object is created, we need to add the rest of the fields and the relationship to Customers.

To create the relationship to Customers, click on New Relationship. Choose the correct customer (the one with the cc prefix).

Contact: New Relationship [Next >] [Cancel]

Choose Related Object
Choose the object to establish a relationship with.

Related Object

Object Name	Description
<input type="radio"/> Approval	Approvals is a system controlled table used to manage and route approvals for objects with the Approval attribute enabled. This object is required in order to use the approval feature.
<input type="radio"/> Certified Payroll	
<input type="radio"/> Certified Payroll Detail 1-4	
<input type="radio"/> Certified Payroll Detail 5-8	
<input type="radio"/> Company [ccCompany]	
<input type="radio"/> Company [company18]	
<input type="radio"/> Concrete Item	
<input type="radio"/> Contact [ccContact] (hierarchy)	
<input type="radio"/> Contact	
<input type="radio"/> Contractor [contractor6]	
<input type="radio"/> Crew	
<input checked="" type="radio"/> Customer [ccCustomer]	

Hit "Next" and then set the Cardinality to "Many Contacts to One Customer". Once this is done, we'll head to the Customer screens to verify the list of contacts was added.



As you can see, the View screen has been updated to include contacts. You can now add or attach contacts at will.

Customer: Demo Company

[Back to List](#) [Edit](#) [Delete](#) [More actions...](#)

Customer Info System Info

Customer Information

Customer [Demo Company](#)
Email demo@democompany.com
Phone Number (239)101-0999
Fax Number (239)221-1211
Christmas Card

Addresses

Physical Address	Billing Address
Address 1 123 South Main St. Address 2 City Fort Myers State Florida Zip Code 33912	Address 1 345 South Secondary St. Address 2 City Fort Myers State Florida Zip Code 33912

Contacts [Attach Contact](#) [New Contact](#) [All Contacts](#)

No records to display.

If you add a contact, you'll quickly see that the contact grid doesn't really have all the fields we might want to see, so we'll customize it to suit our needs. Click the gear icon ("Edit this View") and let's edit the grid.

Remove the Updated At and Updated By fields, then add the following fields (Title, Phone, Email).

Customer: Demo Company

[Back to List](#) [Edit](#) [Delete](#) [More actions...](#)

Customer Info System Info

Customer Information

Customer [Demo Company](#)
Email demo@democompany.com
Phone Number (239)101-0999
Fax Number (239)221-1211
Christmas Card

Addresses

Physical Address	Billing Address
Address 1 123 South Main St. Address 2 8341 Arborfield Ct. City Fort Myers State Florida Zip Code 33912	Address 1 345 South Secondary St. Address 2 City Fort Myers State Florida Zip Code 33912

Contacts [Attach Contact](#) [New Contact](#) [All Contacts](#)

Select [More actions...](#) Contacts 1-1 of 1 [K](#) [<](#) [>](#) [H](#)

Action	Contact	Title	Phone	Email Address
Edit Del Detach	Craig Ellis	President	(239)284-8343	cellis2002@comcast.net

We want to edit this list on the “Edit” screen, but it does not receive the list of contacts, so we’ll edit this screen and add a Grid Component to allow us to edit contacts there as well. If you have not already done so, add a contact so you can “Edit” it. Once on the edit screen, click [Edit this Page](#)

First you need to add a new section below the address section. Call it Contacts, with 1 column, and select Title & Rounded Border Style. Next, find the “Grid Control” in the list of Available Components and drag it into the new section. (Note: A grid control must be the only control in a section). Once done, hit the “Save” button. You will be returned to that screen as shown:

Customer: Demo Company

Save Save & New Cancel

Customer Information

Customer Demo Company

Email demo@democompany.com

Phone Number (239)101-0999

Fax Number (239)221-1211

Christmas Card

Addresses

Physical Address

Address 1 123 South Main St.

Address 2 8341 Arborfield Ct.

City Fort Myers

State Florida

Zip Code 33912

Billing Address

Address 1 345 South Secondary St.

Address 2

City Fort Myers

State Florida

Zip Code 33912

Contacts

At the moment, you have not configured the grid. To do so, click the button. You will then need to select the Relationship.

Customer: Configure Grid Control

Next > Cancel

Select Related Object for Grid

Relationship Contacts - Customers

At this time, the only relationship in the drop down should be for Customers. Go ahead and select it and hit the “Next” button. Pick the fields you want to see and then hit “Next” again.

Customer: Configure Grid of Related Contacts

Next > Cancel

Select Fields for Columns of Grid

Please select fields for grid columns. Formula fields will be automatically calculated during data entry process.

Grid Columns	Available Columns	Selected Columns
	Contact Type	Last Name
	Created At	First Name
	Created By	Title [title]
	Fax	Phone
	ID	Email Address
	Middle Name	
	Mobile Phone	
	Notes	
	State	
	Title [contact_title]	
	Updated At	
	Updated By	

On the last screen, I chose to sort the rows by “Last Name”. Finally click “Save”.

Initial Rows Sorting

Select sorting criteria for existing records. This does not imply dynamic sorting for updated or newly created records.

Sort By

You will now have inline editable rows for your contacts. You can simply add them on the fly.

Customer: Demo Company

Customer Information

Customer

Email

Phone Number

Fax Number

Christmas Card

Addresses

Physical Address

Address 1

Address 2

City

State

Zip Code

Billing Address

Address 1

Address 2

City

State

Zip Code

Contacts

Last Name ▲	First Name	Title	Phone	Email Address	
<input type="text" value="Ellis"/>	<input type="text" value="Craig"/>	<input type="text" value="President"/>	<input type="text" value="(239)284-8343"/>	<input type="text" value="cellis2002@comcast.net"/>	<input type="button" value="Delete"/>

If so desired, you could repeat this process on the “New” screen, but for now I won’t make that change.

