ONEPLACE

OnePlace – Admin Guide

LIGHTNING

2018

Contents

Overview and terminology

Objects and Record Types

Each type of record within OnePlace is referred to as an object, for example, Companies, Contacts, Matters, Lists, Functions Publications etc.

Standard objects – objects which are part of standard Salesforce including: Companies, Contacts and Opportunities.

Custom objects – OnePlace specific objects including: Functions, Publications, Lists, Referrals, Matters, Relationships and Surveys.

Objects can have different Record Types. For example, within the company object, you may have record types for Clients and Non-Clients. For Contacts you may have contacts (of the firm), employees (of the firm) and former employees (of the firm).

The record type determines which fields are used and are visible for that type of company or contact. For example, clients may show fields such as client partner, client number and financial related fields but the non-client would not need to display these fields. For your employees, you may want to show internal information e.g. firm initials, date joined firm and for former employees, date left firm, department employed etc.

Some common examples include:

Objects →	**Companies**	**Contacts**	**Lists**	**Functions**	**Publication**	**Matters**
Record Types →	• Client • Non-Client	• Contacts • Employees • Former Employees		• Event • Training		

NOTE: The standard field for companies is named Accounts by default but this is amended for all clients. When making changes to the object, you may see reference to Accounts as well as Companies.

Profiles and Users

Each user will be assigned a profile. The profile a user is given determines:

- Which objects are visible to the user e.g. you may not want lawyers to see Functions or Publications
- Default record types e.g. when creating a new company, lawyers and secretaries may create a non-client by default, but system administrators may create a client by default
- Field security i.e. read/edit rights for each field
- Which page layout is seen by the user – see page layout section below

Profiles are usually based on the user's role, so you would have profiles for Marketing/BD who would have high access rights, secretaries with slightly less access and then fee earners with slightly less access again for administrative tasks. Then fee earners may have greater access to client financial information than secretaries.

You will always have a System Administrator profile will full access to the system, profiles which would need full access would include the internal administrator and any profiles set up for integration with other systems e.g. PMS or eMarketing integration.

A firm is likely to have profiles for the following:

- System Administrator
- Integration(s) e.g. integration from PMS / emarketing software
- Marketing & Business development
- Secretaries
- Lawyers/Fee earners

Page layouts

Page layouts determine the order fields are displayed for each object/record type combination. For example, when viewing a company, you will have different page layouts when viewing a client vs viewing a non-client.

Client may show: Name, Address, Website, Client Number, Client Partner and Billings YTD.

Non-client may show: Name, Address and Website only.

If all users will have the same view of an object e.g. companies, you can use the same page layout across multiple profiles. However, if you want fee earners to see a different layout to the secretaries (e.g. secretaries see the company address, phone, website at the top of the page but fee earners see the client financials at the top of the page) you can create different page layouts for different profiles.

Using the examples above, you would have 3 different page layouts for Companies:

- Client – fee earner view
- Client – secretary view
- Non-client

Page layouts are then assigned to a profile / record type combination, for example:

	Record Types:	
Profiles:	**Client**	**Non-client**
Fee Earner	Client – fee earner view page layout	Non-client page layout
Secretary	Client – secretary view page layout	Non-client page layout

Switching from Classic to Lightning admin tasks

OnePlace has two types of view: Classic and Lightning. Classic is the older version of OnePlace and Lightning is a new interface with improved graphics and layouts. For any administrators who are familiar with tasks in classic mode, the table below sets out the path within Lightning for common tasks:

Task	**Classic**	**Lightning**
Users	Setup > Manage Users > Users	Cog > Setup > Users > Users
Profiles	Setup > Manage Users > Profiles	Cog > Setup > Users > Profiles
Fields (Salesforce)	Build > Customize > select object > Fields > select field	Cog > Setup > Object Manager > select object > Fields and Relationships > select field
Fields (OnePlace)	Build > Create > Objects > select object > Fields > select field	As above
Areas of Interest	'+' tab > Interests	> Interests
Record Types	Customize or Create > select object > Record Types > select record type	Cog > Setup > Object Manager > select object > Record Types > select record type
Page Layouts	Customize or Create > select object > Page Layouts > select layout	Cog > Setup > Object Manager > select object > Page Layout > select layout

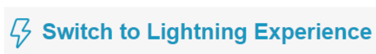
Switching users from Classic to Lightning

When your firm transitions from using classic to lightning view, users can switch between views which is useful for testing. Access to lightning is enabled by profile and you can also force users to view lightning rather than classic interface post any training or communications you may plan.

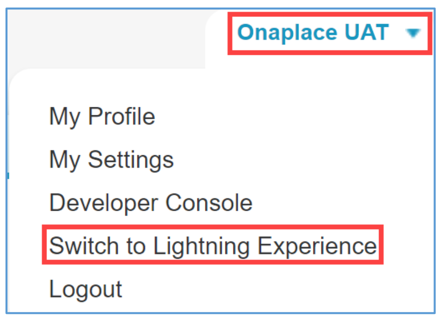
Toggle between classic and lightning views

If a user has access to the lightning interface they can toggle between views. See **Grant access to lightning view** section below to give access.

To toggle from classic to lightning:

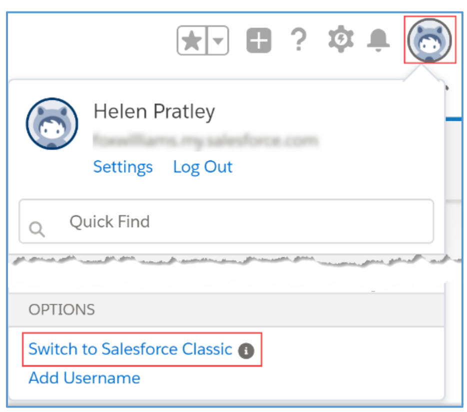
1. Click 

at the top of the page OR
2. Click your user name at the top of the page
3. Select **Switch to Lightning Experience**



To toggle from lightning to classic:

1. Click your user profile at the top of the page
2. Select **Switch to Salesforce Classic**



Granting access to lightning view

Permission to switch to the lightning interface is granted by the profile a user has assigned to them.

For more information about profiles – see **Profiles and users** section in the Overview.

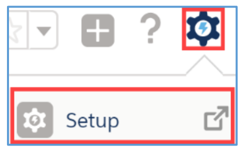
From the classic view:

1. Select 

 at the top of the page
2. On the left-hand side expand **Manager Users** > select **Profiles**

From the lightning view:

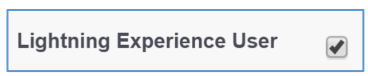
1. Select the  icon at the top of the page and click **Setup**



2. On the left-hand side expand **Users** > select **Profiles**

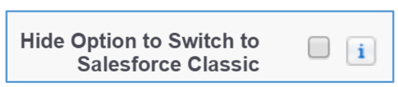
Then:

3. Click **Edit** next to the relevant profile
4. Scroll down to the **Administrative Permissions** section and tick **Lightning Experience User**



5. Click **Save**

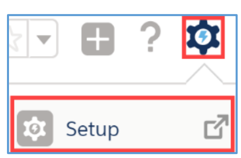
In order to prevent users from switching back to classic, select **Hide Option to Switch to Salesforce Classic**:



Switching users to lightning view

Individual users can be selected to automatically switch to the lightning interface:

1. Select the  icon at the top of the page and click **Setup**



2. On the left-hand side select **Lightning Experience**
3. Click **Set Up Users**
4. Click **Switch Users** at the bottom of the page:

5. Select the relevant users
6. Click **Save**

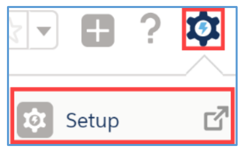
Creating new users

Users can be created individually or imported in bulk using a tool such as Demand Tools which is a data quality & data cleansing toolset for salesforce.com.

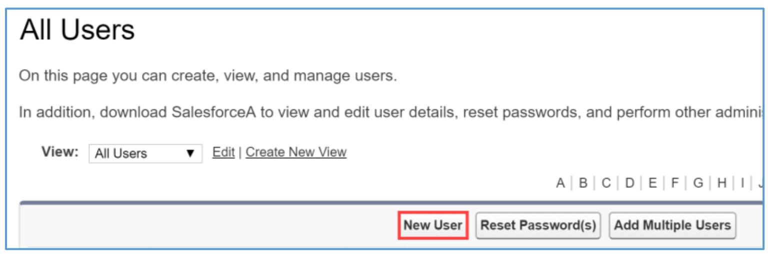
Creating a new user

To enter a new user:

1. Select the  icon at the top of the page and click **Setup**



2. On the left-hand side expand **Users** > select **Users** > click **New User**



3. Fill out the following fields:

- First Name
- Last Name
- Alias – defaults to first initial of the first name and first 4 initials of the last name
- Email
- Username will default to using the email address
- Nickname will default to the email name (excluding the domain)
- Company
- User license = Salesforce Platform
- Profile = select the relevant profile for the user (e.g. Marketing, Secretary, Fee Earner)
- The user will be set to 'Active'

NOTE: When the user logs in for the first time or on a new device, they will be sent a verification code. This will be sent to the mobile number if one is entered here. If not, it will be sent to the email address entered. If you do not want users to receive verification codes via mobile, leave the mobile field blank.

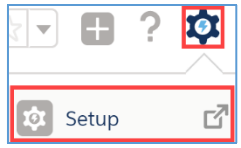
- Untick **Generate new password and notify user immediately** if you do not want the user to be sent an email to set their own password immediately.

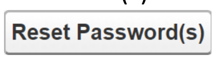
NOTE: Activation emails expire after 24 hours so you may want to time this around training / communication to the user(s).

Resetting passwords

To generate the initial activation emails or to reset a password which a user has forgotten:

1. Select the icon at the top of the page and click **Setup**



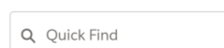
2. On the left-hand side expand **Users** > select **Users**
3. Select the user(s) to reset the passwords for using the tick boxes to the left of each name
4. Click 

This will send each user an email which includes a link allowing them to reset their password.

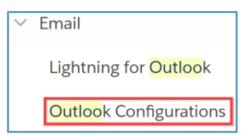
Enable the Salesforce for Outlook panel for new users

If your firm is using the classic Salesforce panel within Outlook, new users need to have this enabled:

1. Select the icon at the top of the page and click **Setup**

2. On the left-hand side type **Outlook** into the quick find bar 

3. Select **Outlook configurations**



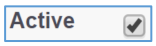
4. Click the **Edit** link next to **Outlook Side Panel With Sync**
5. Add new users to the **Assigned Members** list
6. Click **Save**

Leavers/Deactivating user accounts

Each active user account will use a license. When people leave your organisation, you can deactivate their account so that the license can be used for another user.

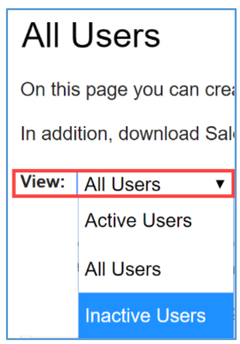
1. Select the icon at the top of the page and click **Setup**

2. On the left-hand side expand **Users** > select **Users**
3. Click **Edit** next to a user 

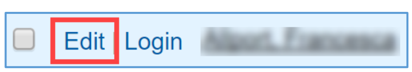
4. Untick **Active**: 

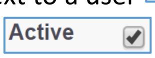
5. Click **Save**

At the top of the All Users page, you can filter the results to show Active Users, Inactive Users or All Users:



Should you need to reactivate a user:

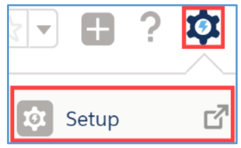
1. Set the **View** to **Inactive users**
2. Click **Edit** next to a user 

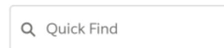
3. Tick **Active**: 

4. Click **Save**

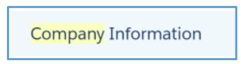
Checking spare licenses

1. Select the  icon at the top of the page and click **Setup**



2. On the left-hand side type **Company** into the quick find bar 

3. Select **Company Information**



This will show you details about your OnePlace Organisation including the number of remaining and available licenses.

When viewing **Company Information** the User licenses you have available show as **Salesforce Platform**. Whether they're *Lite* or *standard* licenses is determined by how OnePlace charges you for them. It's based on which *profiles* are assigned to a user so when purchasing new licenses, just let OnePlace know how many lite/standard licenses you need and all licenses will display in this view as **Salesforce Platform** licenses.

User Licenses — Buy More Licenses — User Licenses Help

Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Chatter Free	Active	5,000	1	4,999	07/08/2018
Salesforce	Active	5	5	0	07/08/2018
Salesforce Platform	Active	36	35	1	07/08/2018
Chatter External	Active	500	0	500	07/08/2018

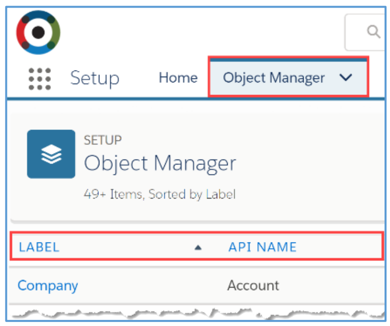
Adding new list values

For details on editing field labels – see **Editing Field Names** section.

To update values shown in Areas of Interest – see **Areas of Interest** section.

1. Select the icon at the top of the page and click **Setup**

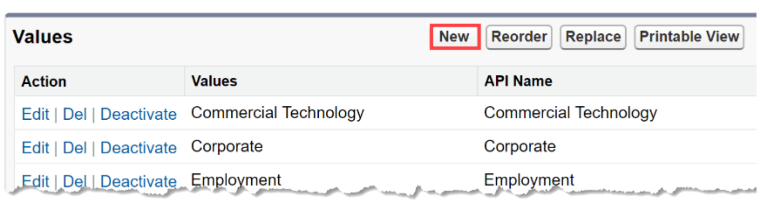
2. Select the **Object Manager** tab at the top of the page



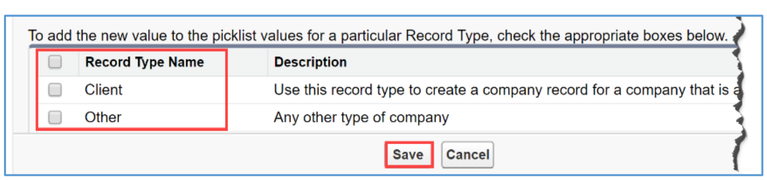
3. Select the **relevant object** e.g. Company

NOTE: The **Label** column shows the object name used within your organisation, the **API Name** shows the default name. For example, most firms rename Accounts to become Companies – sort by the label column to easily find the right object.

4. Select **Fields & Relationship** on the left
5. Select the relevant field
6. Scroll to the **Values** list and click **New**



7. Type or paste in the new value(s) - multiple values should be separated by a line break
8. If the object has record types, select which record type(s) the new value(s) relate to

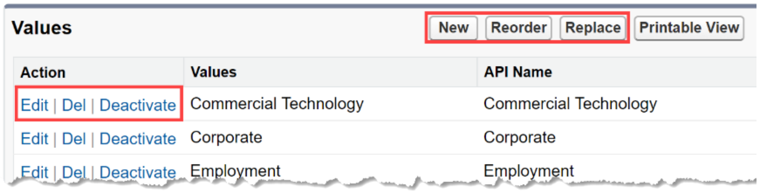


9. Click **Save**

For more information about objects and record types – see the **Overview and Terminology** section.

Editing and deleting list values

When viewing list values, you can select the relevant button or link to reorder, edit or delete a value:



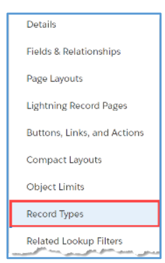
Button / Link	Use
New	Enter new value(s)
Reorder	By default, values will display in the order they were entered, you can manually reorder fields, set them to display alphabetically and also set a default value to display in the pick list
Replace	To merge values, e.g. if you have 2 active values and you want to replace 1 with the other
Edit	Allows you to change the label, API Name or set as default value for the pick list
Del	This will delete the existing values in the system and the option will no longer be available in the field
Deactivate	The value will be moved to the **Inactive Values** section. Existing values will remain in the system but the option can no longer be selected

Error when deleting pick list values

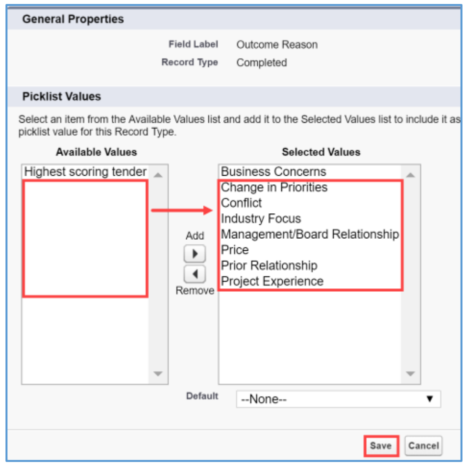
If all existing values on a pick list field are deactivated or deleted, you may receive an error message when deleting the last remaining option. This will occur where the object has multiple record types and the value you are deleting is the final value assigned to a record type.

To resolve this:

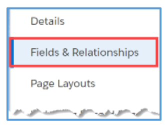
1. Add any new pick list values and select which record type(s) they apply to
2. Click **Record Types** on the menu on the left



3. Select the first record type which is stopping you delete the final value
4. Select **Edit** next to the relevant field
5. Move the new values to the right-hand column
6. Click **Save**



7. Repeat steps 3-7 for each relevant record type
8. Go back to the **Fields and Relationships** section from the menu on the left

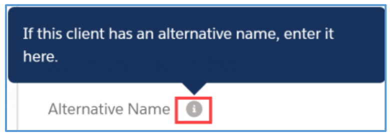


9. Select the relevant field
10. In the **Values** section, delete or deactivate the remaining incorrect picklist value

Adding help text to fields

Each field can have help text displayed to guide the user.

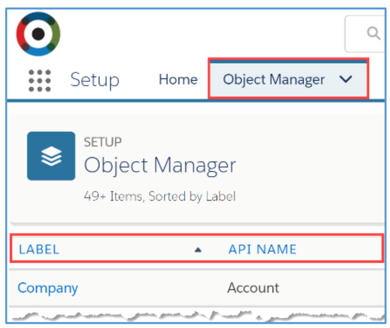
Help text is displayed like this:



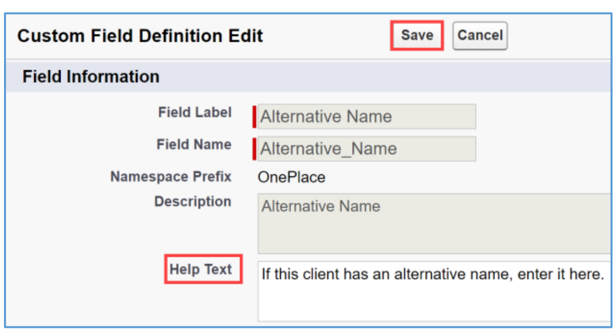
To edit or add help text to a field

1. Select the  icon at the top of the page and click **Setup**

2. Select the **Object Manager** tab at the top of the page



3. Select the **relevant object** e.g. Company
4. Select **Fields & Relationship** on the left
5. Select the relevant field
6. Click **Edit** at the top of the page
7. Enter or edit the help text
8. Click **Save**



Areas of Interest

To edit the **Areas of Interest** values:

1. Click the icon
2. In the All Items section click **Interests**
    a. You can search for it using the search box at the top of the page
3. This will show your **recently viewed** items > select **All** from the view drop down at the top
4. You can click an *interest* to edit it
5. Click the **New** button at the top to create new values within the list
6. This list can have multiple layers by selecting a **Parent Interest**
7. [Vuture integration] – Vuture will integrate with this field, you may want to display only certain values on your Vuture preference form. In the **Usage** section, select Vutu.re for any values you want to be available within Vuture

NOTE: Adding **Vutu.re** as a chosen value does not automatically add it to your preference form – you will need to contact Vuture to update the preference form.

Editing field names

Editing field names within OnePlace varies depending on the object and type of field. OnePlace includes both standard and custom objects. Standard objects are made up of a set of standard fields, but custom fields can also be added to an object.

Standard objects e.g. Companies, Contacts and Opportunities.

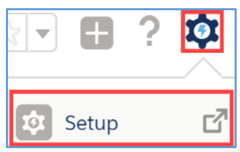
Custom objects e.g. Functions, Publications, Lists, Referrals, Matters, Relationships and Surveys.

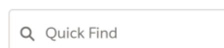
Editing OnePlace objects and Salesforce custom fields using Override

Override is used to update OnePlace objects or custom field on a Salesforce object.

You can change the field names which are displayed in OnePlace – for example you may want to display *County* instead of *State* for address fields:

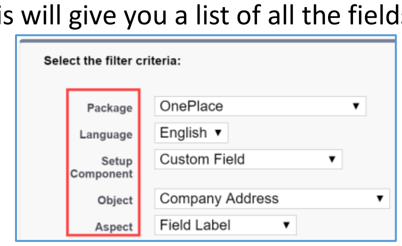
1. Select the  icon at the top of the page and click **Setup**



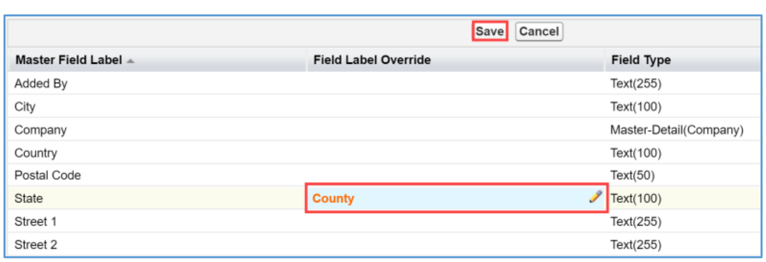
2. On the left-hand side type **Override** into the quick find bar 

3. Select **Override**
4. Set the values to the following:

- Package = **OnePlace**
- Setup component = **Custom field**
- Object = select the **relevant object** e.g. Account, Contact, Function
- Aspect = **Field Label** – this will give you a list of all the fields for the selected object



5. In the **Field Label Override** column you can enter a new label name by double clicking to edit the column


Save Cancel

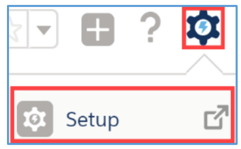
Master Field Label	Field Label Override	Field Type
Added By		Text(255)
City		Text(100)
Company		Master-Detail(Company)
Country		Text(100)
Postal Code		Text(50)
State	County	Text(100)
Street 1		Text(255)
Street 2		Text(255)

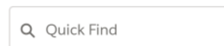
Tip – at the bottom of the page use the **Previous** and **Next** buttons or enter a page number to find the field(s) you want to update.

Editing Object names and standard Salesforce fields using Rename

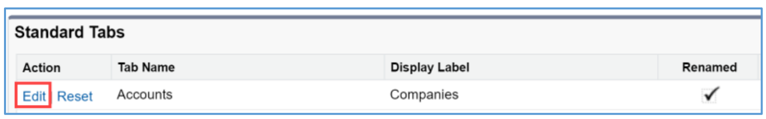
Object names and any related fields can be edited to match your firm's nomenclature.

1. Select the  icon at the top of the page and click **Setup**

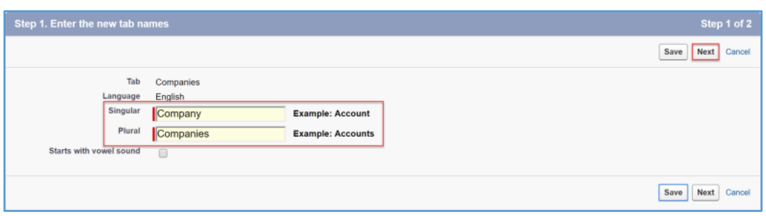




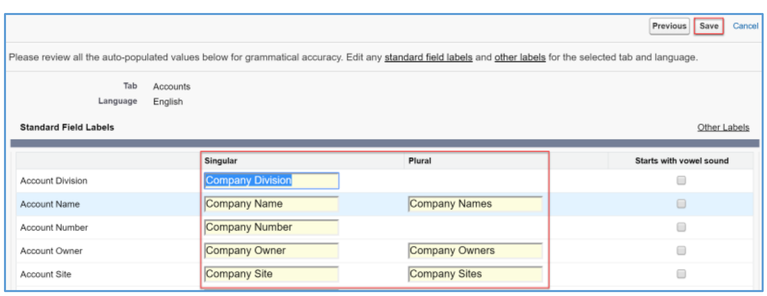
2. On the left-hand side type **Rename** into the quick find bar
3. Select **Rename Tabs and Labels**
4. Click **Edit** next to the relevant object



5. Enter a new object name in singular and plural
6. Click **Next**



7. Enter any new field names
8. Click **Save**



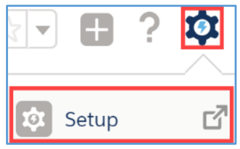
Changing field level security

A profile will determine which objects and fields are visible to a user. Therefore, field level security is managed on profiles.

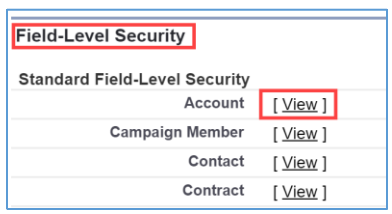
For more information about profiles – see **Profiles and users** section in the Overview.

NOTE: Never remove access from System Administrator or Integration profiles.

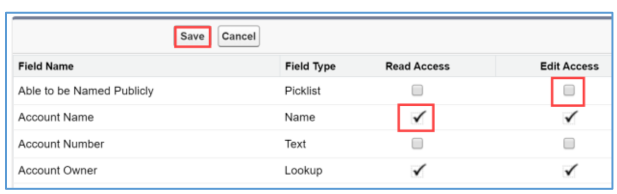
1. Select the  icon at the top of the page and click **Setup**



2. On the left-hand side expand **Users** > select **Profiles**
3. Select the relevant profile
4. Scroll down to the **Field Level Security** section
5. Click **View** next to the relevant object



6. Click **Edit**
7. Tick/untick **Read** and **Edit Access** as needed
8. Click **Save**



NOTE: To make a field visible for a user, add the field to the relevant page layout(s) and ensure the profile which the user is assigned has at least *Read* access to the field.

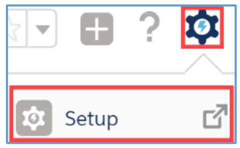
Tip: To ensure you're amending access to the correct fields on a profile, you can view the relevant page layout(s) and note down the fields which are in use for an object. If you do this in excel you can include a column which shows the order of the fields, then sort the data alphabetically. This will make it easier to compare with / update the security on the fields (as noted above).

Default Record Types

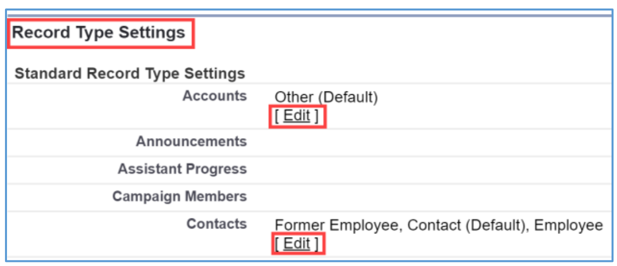
A profile will determine which Record Types are visible and used by default for a user. Therefore, record types are managed on profiles.

For more information about record types or profiles – see the **[Objects and Record Types]** and **[Profiles and users]** sections in the Overview.

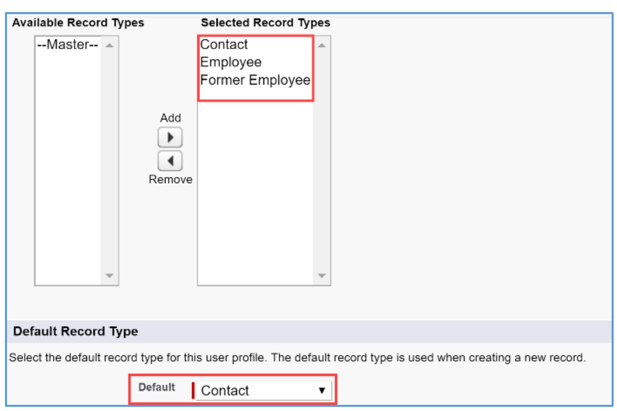
1. Select the  icon at the top of the page and click **Setup**



2. On the left-hand side expand **Users** > select **Profiles**
3. Select the relevant profile
4. Scroll down to the **Record Type Settings** section
5. Click **Edit** next to the relevant object



6. Ensure the record types you want this profile to be able to create are in the **Selected Record Types** column
7. At the bottom of the page, select the default record type for the profile
8. Click **Save**



See below an example of typical set up. Default record types are show in **bold:**

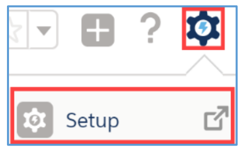
Profile →	**Marketing & BD**	**Standard / Secretary**	**Lite**
Account (Company)	Other	Other	Other
Contact	**Contact** Employee Former Employee	Contact	Contact
Matter contacts	Internal **External**	Internal **External**	Internal **External**
Pipeline	**Formal** Informal	Formal **Informal**	Formal **Informal**
Pipeline contacts	Internal **External**	Internal **External**	Internal **External**
Referrals	Outbound **Inbound**	**Outbound** Inbound	**Outbound** Inbound
Relationships	Client Relationship Partner **Known By** Former Employee of	Client Relationship Partner **Known By** Former Employee of	Client Relationship Partner **Known By** Former Employee of

Other Profile settings

A profile determines what a user has access to, therefore many access options are available at the profile level.

For more information about profiles – see the **Profiles and users** section in the Overview.

1. Select the  icon at the top of the page and click **Setup**



2. On the left-hand side expand **Users** > select **Profiles**
3. Select the relevant profile
4. Click **Edit**

See the table below for available permission options:

Permission	Section on profile page	Next Action
Access to ‘Setup and configuration’ options	Administrative Permissions	Tick **View Setup and Configuration**
Allow user to import custom objects (e.g. relationships)	Administrative Permissions	Tick **Import Custom Objects**
Stop users from editing shared list views (saved searches)	Administrative Permissions	Untick **Manage Public List Views**

5. Click **Save**

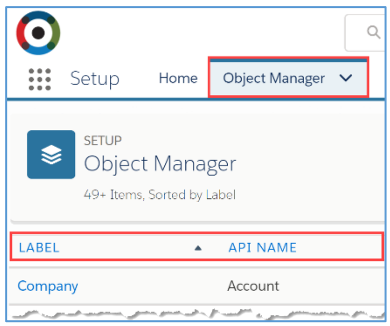
Tip: To quickly find the relevant option on the profile page, use **Ctrl** + **F** to search

Page Layouts

Page layouts determine the order fields are displayed for each object/record type combination. For example, when viewing a company, you will have different page layouts when viewing a client vs viewing a non-client.

1. Select the icon at the top of the page and click **Setup**

2. Select the **Object Manager** tab at the top of the page



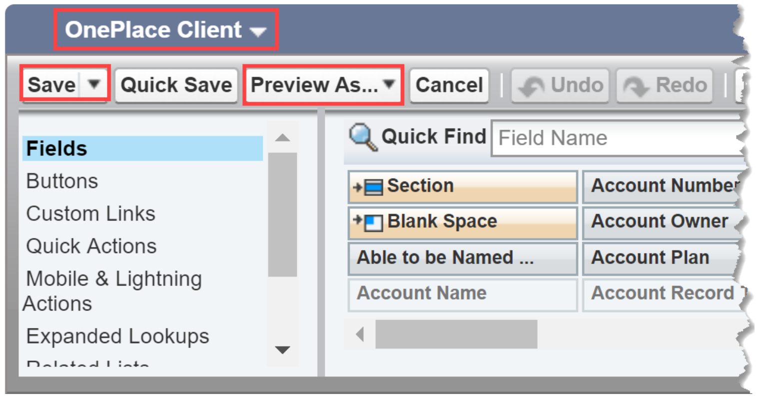
3. Select the **relevant object** e.g. Company

NOTE: The **Label** column shows the object name used within your organisation, the **API Name** shows the default name. For example, most firms rename Accounts to become Companies – sort by the label column to easily find the right object.

4. Select **Page Layouts** on the left
5. Select the relevant page layout

When viewing a page layout, you can:

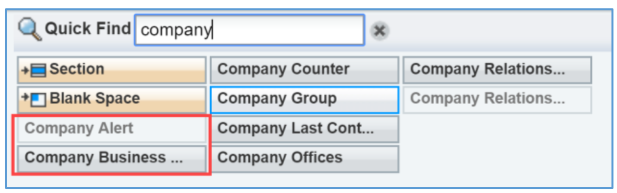
- Switch between layouts for the selected object using the drop-down at the top of the page.
- **Save** and **Save As** (drop-down arrow next to **Save**)
- The **Preview As** drop-down allows you to select which profile settings to view the page layout with, allowing you to check hidden fields etc.



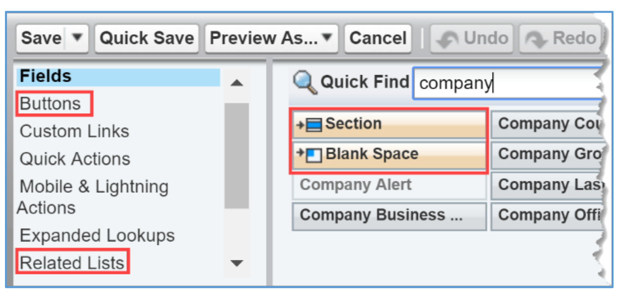
Adding fields, buttons and related lists to Page Layouts

Fields can be added to your page by dragging and dropping them onto the page layout. Fields can only be displayed once on each page layout.

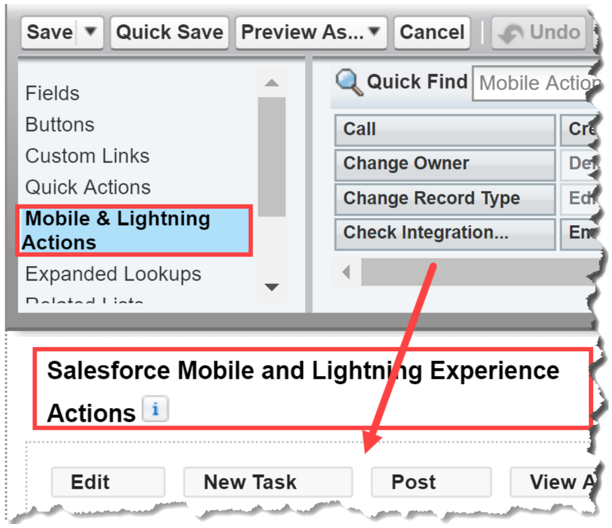
You can find fields easily using the **Quick Find** box – fields which are greyed out are already on the page layout – click the field to locate where it's being used. Fields in bold can be dragged and dropped on to the page.



You can also drag new **Sections**, **Blank Spaces**, **Buttons** and **Related Lists**:

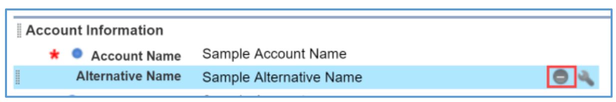


For buttons to be available on the mobile app and/or lightning views, select options from the **Mobile & Lightning Actions** section and drag them to the **Salesforce Mobile & Lightning Experience Actions** area on the page layout.



Hiding fields on page layouts

To remove a field from the page layout completely, hover over the relevant field and click the minus sign:

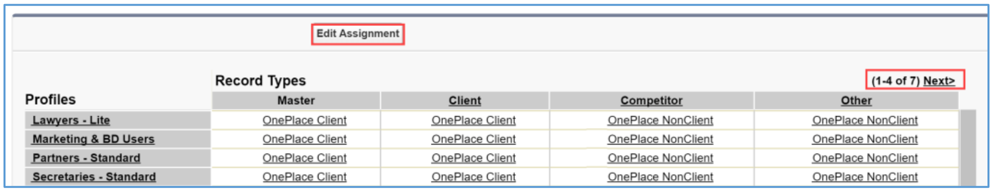


To hide a field from a specific set of users, you need to amend the field security on the profile – see **Changing field level security** section for more information.

Assigning page layouts

Once a page layout has been created it must be assigned to a profile for those users to view the new layout.

1. From the list of page layouts, click **Page Layout Assignment** button (top of the page)
2. Click **Edit Assignment**



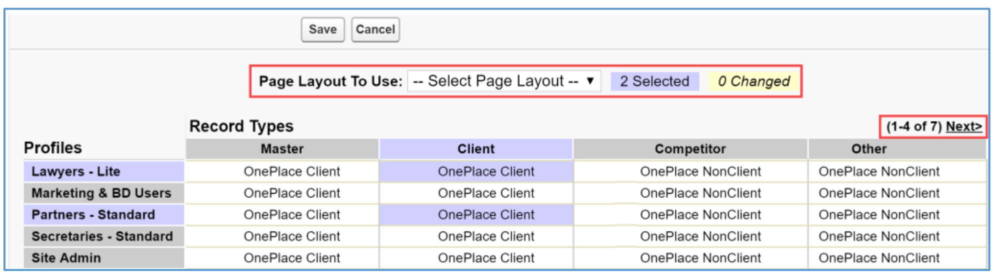
Edit Assignment

Record Types (1-4 of 7) Next>

Profiles	Master	Client	Competitor	Other
Lawyers - Lite	OnePlace Client	OnePlace Client	OnePlace NonClient	OnePlace NonClient
Marketing & BD Users	OnePlace Client	OnePlace Client	OnePlace NonClient	OnePlace NonClient
Partners - Standard	OnePlace Client	OnePlace Client	OnePlace NonClient	OnePlace NonClient
Secretaries - Standard	OnePlace Client	OnePlace Client	OnePlace NonClient	OnePlace NonClient

3. Select the relevant profile / record type(s) (use Ctrl to select multiple cells)
4. Select the newly created page layout from the drop down at the top of the page

TIP: Remember to click **Next** (top right of list), if necessary, to see the other record types and assign the new layouts to the relevant record types.



Save Cancel

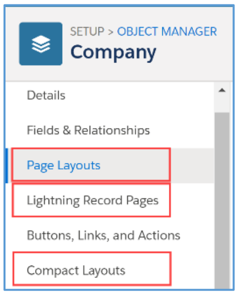
Page Layout To Use: -- Select Page Layout -- 2 Selected 0 Changed

Record Types (1-4 of 7) Next>

Profiles	Master	Client	Competitor	Other
Lawyers - Lite	OnePlace Client	OnePlace Client	OnePlace NonClient	OnePlace NonClient
Marketing & BD Users	OnePlace Client	OnePlace Client	OnePlace NonClient	OnePlace NonClient
Partners - Standard	OnePlace Client	OnePlace Client	OnePlace NonClient	OnePlace NonClient
Secretaries - Standard	OnePlace Client	OnePlace Client	OnePlace NonClient	OnePlace NonClient
Site Admin	OnePlace Client	OnePlace Client	OnePlace NonClient	OnePlace NonClient

Lightning page layouts

When viewing an object (from the Object Manager) you will see several options which determine the way the object is seen in OnePlace.



The **Page Layouts** determine:

- The **buttons** at the top of the lightning view
- The order of fields in the **Details** tab
- The order of related lists in the **Related** tab

Lightning Record Pages determine the overall layout of the page.
Compact Layouts determine the fields visible in the top section of each page – referred to as the Highlights Panel.

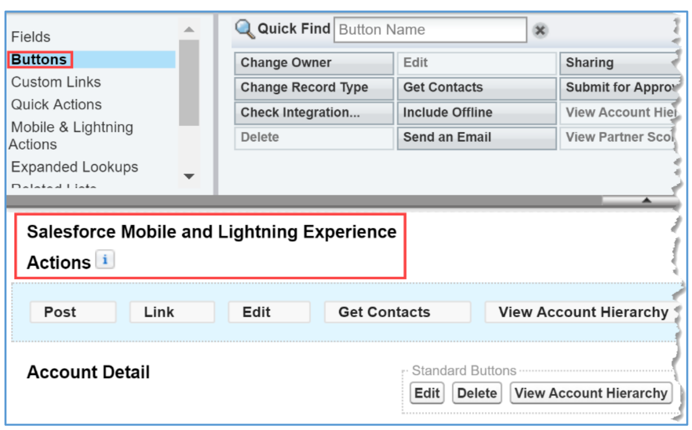
Buttons

The buttons selected on the page layout are a list of all actions you want the users to be able to perform on the page.

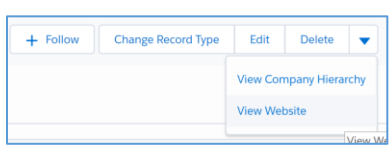
Users will only see the action they have security right to perform – e.g. if a user doesn't have access to delete companies, they will not see the delete button on the page. Some buttons will only be visible when using the mobile app e.g. Send an Email, Call and Send Text. If you want your users to be able to perform these actions they should be included here.

When editing the page layout, the available actions are shown in the **Salesforce Mobile and Lightning Experience Action** section.

New buttons can be added by selecting **Buttons** from the panel at the top of the page and dragging and dropping them onto the page layout:



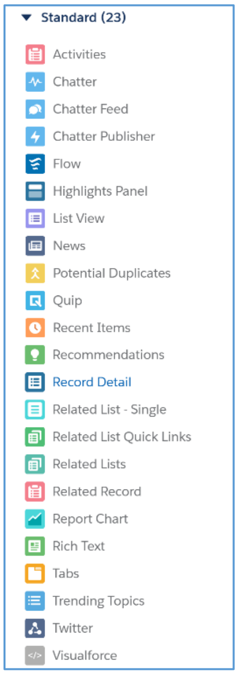
Buttons will appear in the top right of the page, a drop-down will automatically display if there is not enough space to display all selected options:



Lightning Record Pages

1. Select **Lightning Record Pages**
2. Select the relevant layout
3. Click **Clone** to make a copy of an existing layout; or
4. Click **Edit**

Components can be added and moved by dragging and dropping from the options available on the left of the screen.



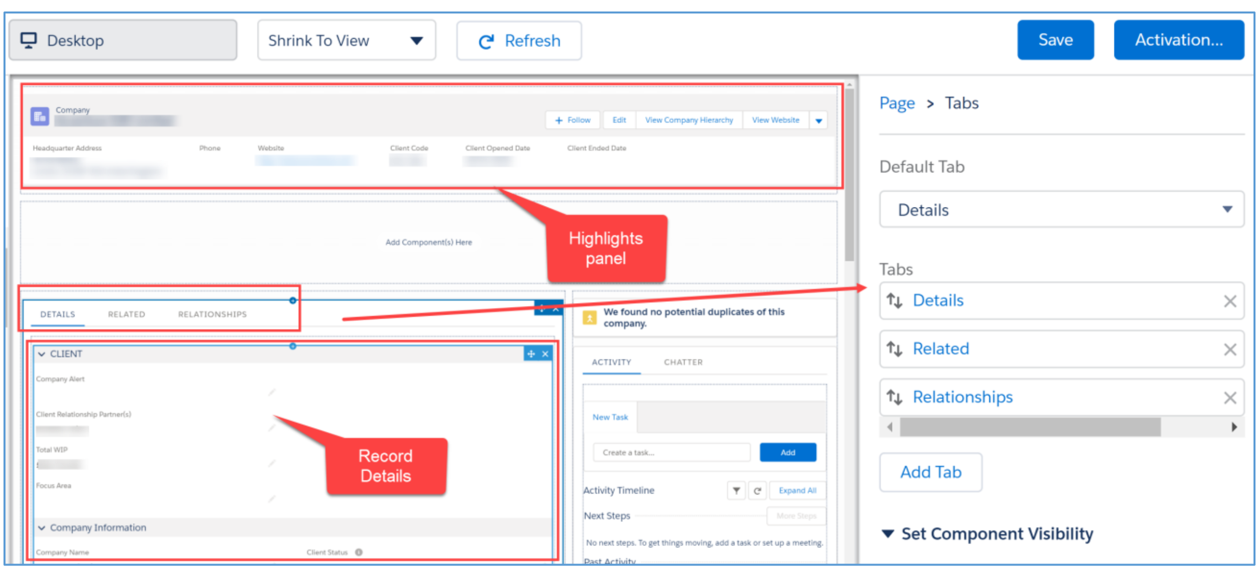
The **Highlights Panel** will include the action buttons and the fields selected in the **Compact Layout** (see below).

Record Details will display the relevant page layout

Related Lists will display the related lists specified at the bottom of the relevant page layout

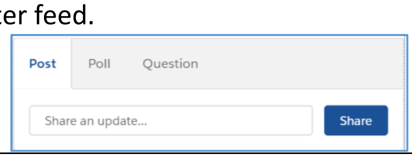
Related List – Single allows you to display 1 or more of the related lists specified at the bottom of the relevant page layout

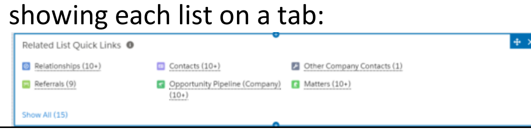
Selecting a component will display the available options on the right-hand side, allowing you to select, reorder and add new items such as tabs.

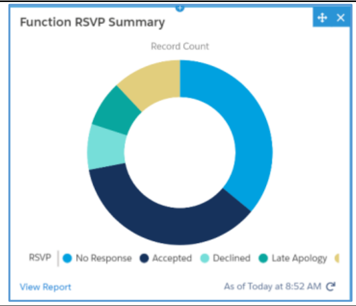
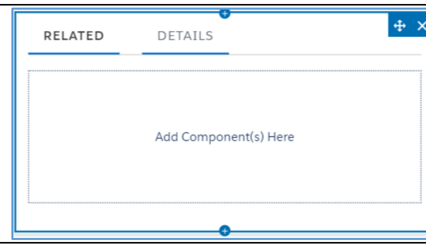


Lightning Page Layout components

When editing a Lightning Page Layout, the following standard components are available to include:

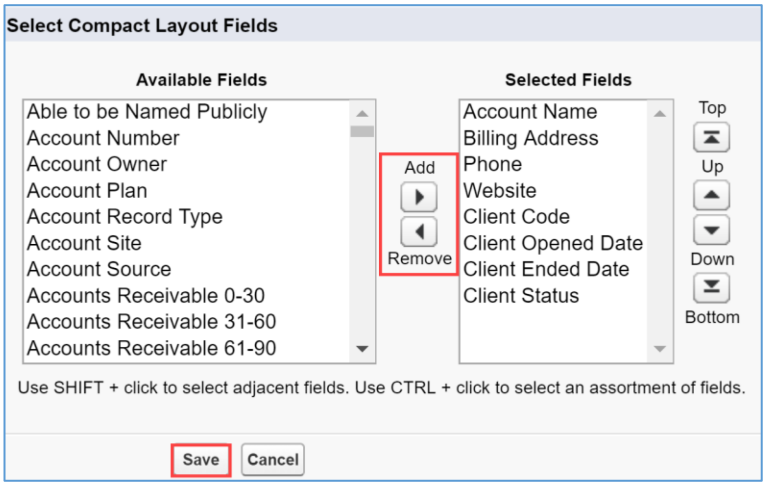
Component	Description	Use / Details / Example:
Accordion	Display a set of vertically stacked sections.	
Activities	Display the timeline of activities for the record.	Displays the Activities for the record (e.g. company or contact in view).
Chatter	The publisher and chatter feed for the record.	Displays the Chatter feed for the record and allow users to add posts and polls to the feed. To be used on record page layouts.
Chatter Feed	A place to add post, polls, and questions to the record feed.	Let users view different types of Chatter Feeds: • Record • Bookmarked • What I Follow • To Me Can be used on the home page to show each user their required chatter view. The user can select the relevant Chatter feed to view.
Chatter Publisher	A place to add post, polls, and questions to the record feed.	Let users add posts, questions and polls to a chatter feed. 
Flow	Runs a flow.	Custom workflows which can be built within OnePlace.
Highlights Panel	Show a header that contains page-level actions and key level record fields.	Displays the fields specified in the relevant **Component Record Page** and the action buttons specified in the relevant page layout **Mobile and Lightning actions** section. 
List View	Display a list view for an object.	Displays the results of a list view (saved search) – most often used on the home page.
News	Displays top news articles for the account, contact or lead.	By default, this section shows North American news sources. If used on a Company record, it will display news related to the selected company.

		If used on the home page, news on recently viewed companies for each user will be displayed.
Path	Visual representation of a business process.	Guides a user through a process. Paths are created in **Setup** > **Path Settings**. 
Potential Duplicates	On a record's homepage, display the number of duplicate records.	Will identify potential duplicates of the record and allow users to merge. Duplicate rules are set up/activated in **Setup** > **Matching Rules**. Then put in place in **Setup** > **Duplicate Rules**.
Quip	Quip Component.	A licensed application from Salesforce that can be purchased. Quip allows for collaboration on documents that can be attached to contacts and companies.
Recent Items	Display a set of recently viewed records.	Best used on the home page to display records recently viewed by the user.
Recommendations	Display personalized recommendations.	Not applicable to OnePlace customers.
Record Detail	Show the fields, report charts, and Visualforce components from the record's page layout.	Displays the fields specified on the **Page Layout** for the relevant object / record type.
Related List - Single	Display one related list for the record.	Displays one related list for the object. Can be added multiple times to show different related lists on a tab e.g. Invitees and Publication Subscribers. Related Lists are specified on the **Page Layout** for the relevant object / record type.
Related List Quick Links	Show quick links with hovers to preview related list data.	Displays links to the related lists rather than showing each list on a tab: 
Related Lists	Show the set of related lists available for the record.	Displays the set of related lists as a block. The order of the related lists is specified on the **Page Layout** for the relevant object / record type.
Related Record	Display a related record's details.	Let users view a related record, for example, when viewing a function, you can see the parent function details. This component also allows users to edit the related record inline, change the related record and create a new related record.
Report Chart	Display a chart from a report.	Displays a chart generated from a report, e.g. when viewing a function, display the RSVP chart:

		
Rich Text	Display HTML-formatted rich text.	Useful for a rich text notes field.
Tabs	Display a set of tabs.	
Trending Topics	Displays the populate topics in organization.	Applicable when the firm is using Chatter and has created Topics of interest against which chatter posts have been made.
Twitter	Displays Twitter profile information for the account, contact or lead.	Allows users to log into Twitter, connect the record in OnePlace with a Twitter account and then view the Twitter feed within OnePlace. Required each user to log into Twitter independently to view the Twitter feed.
Visualforce	Display a Visualforce page.	Not applicable to OnePlace customers.

Compact Layouts

1. Select **Compact Layouts**
2. Select the relevant layout
3. Click **Edit**
4. Select a field on the left and click the **Add** button to include the field at the top of the page
5. Click **Save**



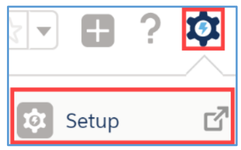
TIP: This section should contain a small number of key fields – consider the width of the page when adding fields.

Auditing fields

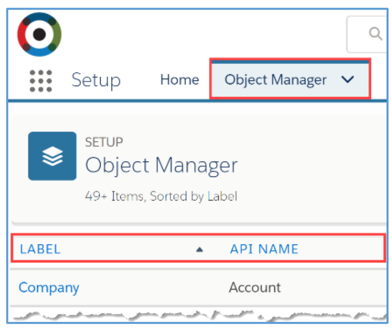
Up to 20 field for each object can be set to be audited. The changes made to the object e.g. companies or contacts can be published by including an history section to show users which field was changed, when, by whom and the previous value.

Selecting fields to audit

1. Select the  icon at the top of the page and click **Setup**



2. Select the **Object Manager** tab at the top of the page



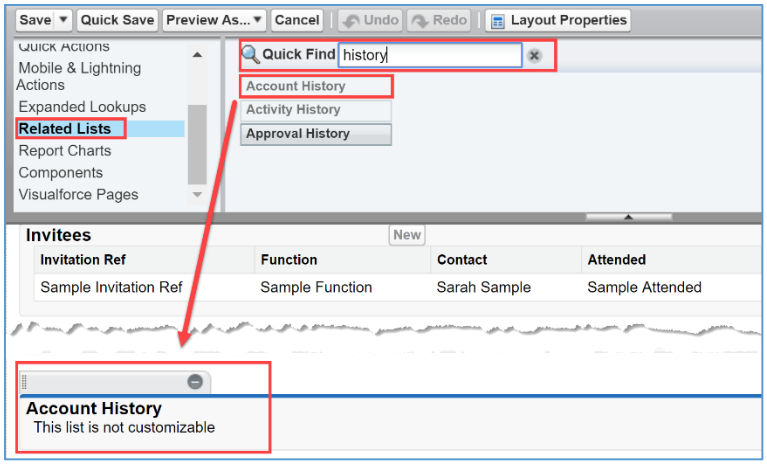
3. Select the **relevant object** e.g. Company
4. Select **Fields & Relationship** on the left
5. Click Set History Tracking at the top of the page
6. Select the field(s) you would like to include in the audit
7. Click **Save**

Adding an 'history' section to page layouts

To display changes to the audited fields you need to add the relevant history section to the page layout:

1. Edit the page layout for the relevant object e.g. companies
2. Select **Related Lists** from the panel at the top of the page
3. Use the **Quick Find** box to find the relevant history section e.g. **Account History**
4. Drag and drop the section on to the page layout

You will need to add the history section to all relevant page layouts e.g. for clients and non-clients.


Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Components
Visualforce Pages
Quick Find
history
Account History
Activity History
Approval History
Invitees
New
Invitation Ref
Function
Contact
Attended
Sample Invitation Ref
Sample Function
Sarah Sample
Sample Attended
Account History
This list is not customizable

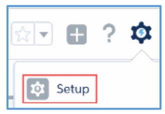
Setting up Relationships Types

There are 3 steps to creating a new relationship:

1. Create the Relationship Type
2. Create the Page Layout
3. Create the Relationship Record Type

Creating the Relationship Type

1. Click the cog icon and select **Setup**

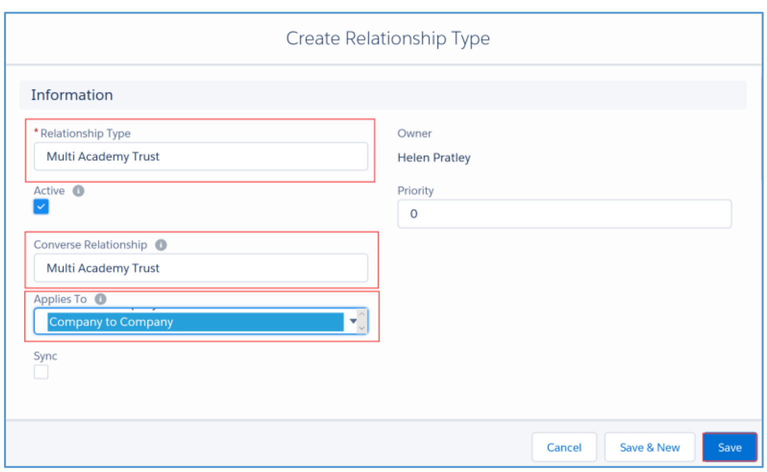


2. Click **Setup** (top left) to see the App Launcher

3. Search for and select **Relationship Types** in the App Launcher
4. Click **New** (top right) > enter the ***Relationship Type***, ***Converse Relationship*** and select the objects the relationship applies to (e.g. Company to Company or Person to Company) > click **Save**

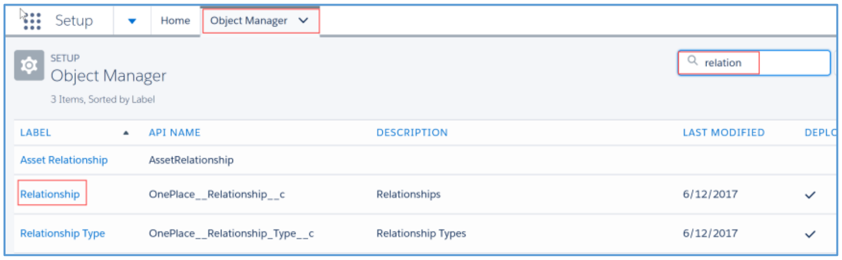
Tips:

- The converse relationship value isn't shown in OnePlace when the relationship is recorded so it's best to use the same relationship description for the type and the converse.
- Note the *exact name and case* of the Relationship Type – this must be used for the Record Type for the relationship to display in OnePlace.

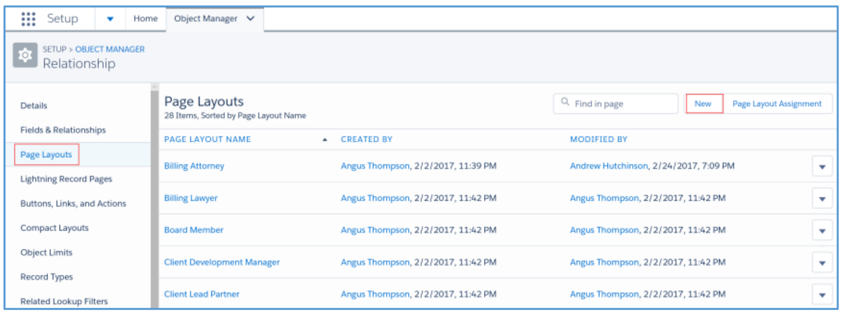


Creating the Page Layout

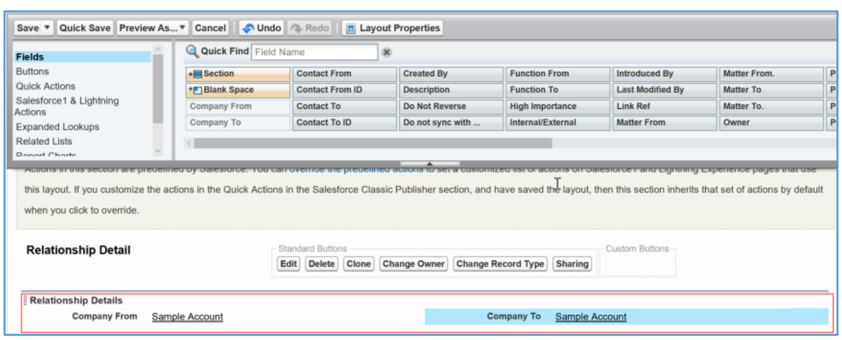
1. Click the **Object Manager** tab and select **Relationship** – you can use the search box to quickly find objects:



2. Click **Page Layouts** > click **New**

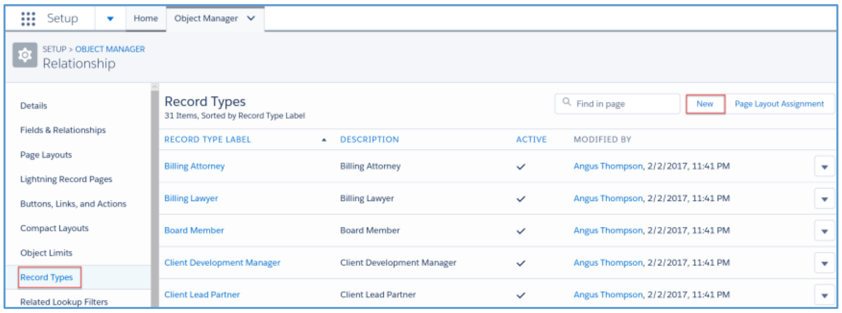


3. Enter a name for your page layout > add a section and include the relevant fields by dragging and dropping from the options at the top of the screen (e.g. Company from, Contact To etc)
4. Click **Save**

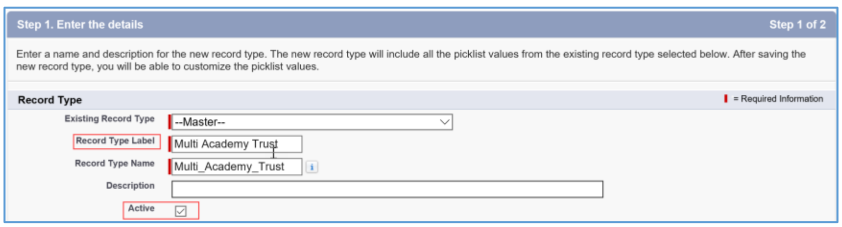


Creating the Relationship Record Type

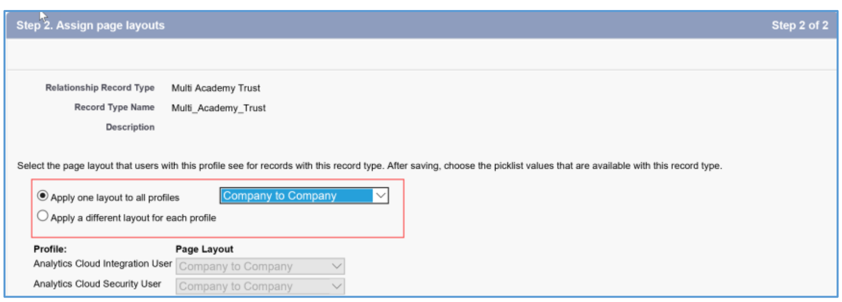
1. Click **Record Types** > click **New**



2. Enter the *exact* name used for the relationship type as the **Record Type Label**
3. Tick the **Active** box
4. Select the profiles you wish to enable this relationship for (e.g. Marketing, Fee Earners) > click **Next**



5. Select the Page Layout created in the previous step. You can apply one Page Layout to all profiles or apply different layouts for each profile as necessary > click **Save**



Batch Processes

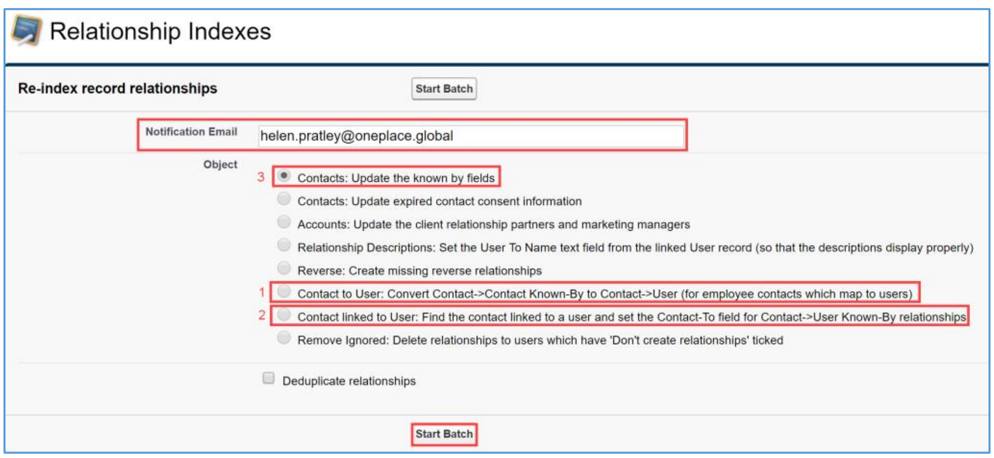
The Batch Process (previously known as Relationship Index) can be used to update relationships stored in OnePlace for various purposes such as updating client relationship partners on companies or creating missing reverse relationships.

Updating known by relationships

If you create ‘known by’ relationships before you have created user accounts, the relationships will be built to the contact record for the internal person. Once the user records have been created, you can convert the relationship so that it’s recorded against the user, rather than the contact.

1. Click the icon
2. Select **Batch Processes**
3. Select **Contact to User** > click **Start Batch**
4. Once complete, select **Contact Linked to User** > click **Start Batch**
5. Once complete, select **Contacts** > click **Start Batch**

NOTE: Wait for the confirmation of completion email which will be sent to the address listed at the top of the page before running the next step



If the confirmation email doesn’t arrive you can check if the process has run successfully by going to:

Set up > Jobs > Apex Jobs

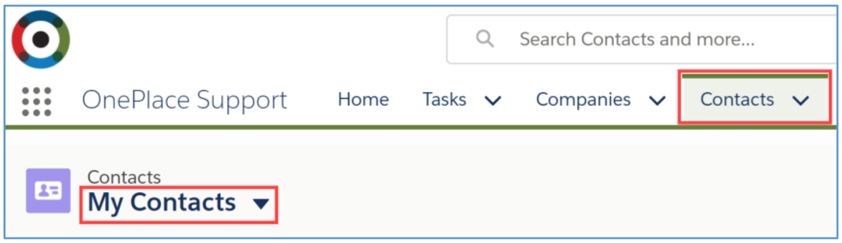
Known by Relationship and My Contacts

Known by relationships are created when you add a new contact to OnePlace or by clicking the **I know** button on a contact record which already exists in the system. Known by relationships can also be imported into the system.

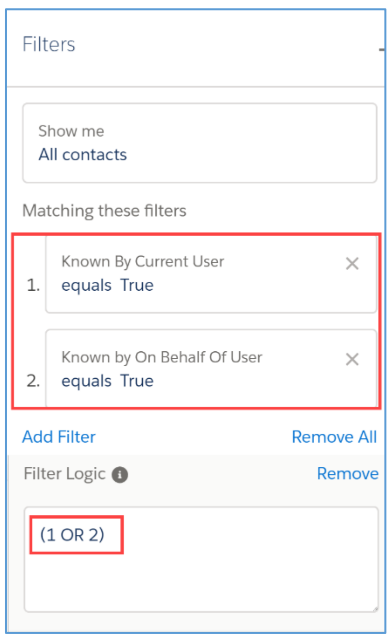
If relationships are imported before a user is created the **Known by Users** field is populated. If the user already exists, both the **Known by Users** field and the **Known by aliases** fields are populated.

Once a user is created, the relationship indexer batch process can be run to update the relationships to populate the known by aliases field too. See the Batch Processes section below for details.

A user can view the contacts they know in the My Contacts view (search):



This search will display contacts which are known by the current user OR known by the on behalf of user. Both searches look at the **alias** field only, therefore, if the user does not yet exist in OnePlace, the contacts they have a relationship built with will not display until the user record is created and the relationship indexer is run to populate the alias field:



NOTE: The employee contact record had a field called **Internal User**, when the user record is created, this field should be populated with the user details. The field must be populated when the relationship reindexer is run in order to populate the **known by alias** field and therefore have the My Contacts view display the relevant contacts.

Button to run a report on function or publication

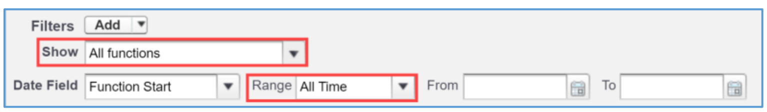
A button can be added to the function or publication page which will run a specified report. This allows you to determine exactly which fields you want to include on a report and have it run from a function or publication page by any user.

There are 3 main steps, full details of each step can be found below:

1. Create a report containing the required fields
2. Create a button linking to the report
3. Add the button to the function or publication page layout

Create a report containing the required fields

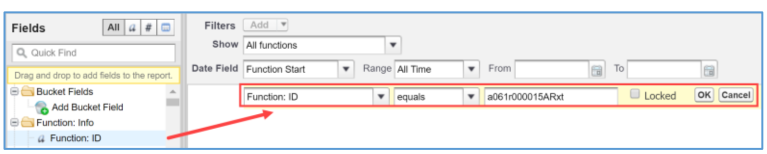
1. Open an existing function or publication and copy the function ID or publication ID from the URL (e.g. a061r000015ARxtAAG)
2. Create a new report which includes the fields you want to include on the export:
    a. **Reports** tab
    b. **New Report**
    c. **Function with Invitees and Contact** OR **Publication with Subscribers and Contacts**
    d. **Create**
    e. Ensure the filters are showing **All functions** and the Date Field is set to **All Time**



3. Drag the **Function: ID** or **Publication ID** field into the filters area and paste in the function ID or publication ID copied (above). You will also need this ID again later.

Please note that a function ID must be included in the filter, the ID is then replaced with the relevant function ID or publication ID when the button is used on a different function or publication.

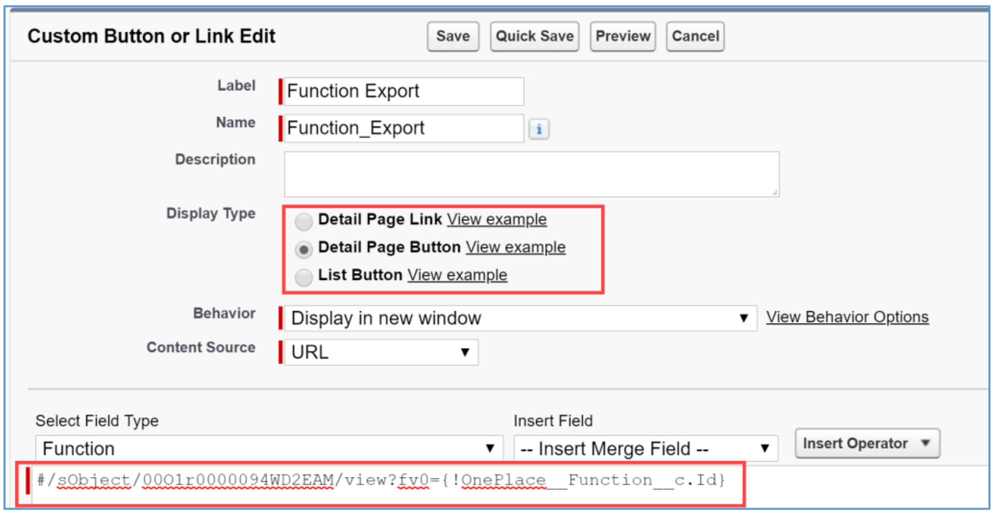
4. Delete the last 3 characters of the Function ID or Publication ID (so it's 15 characters long) and click **OK**



5. Drag the Function ID or Publication ID column to appear on your report – if this is not included, the report may not run accurately
6. Include any other columns you want to see on your report
7. Click **Save**
8. Enter a report name and save the report to a shared location e.g. **OnePlace Function Reports / OnePlace Publication Reports**
9. **Save** > **Close** > **Save & Close**
10. Re run the report and copy the **Report ID** from the URL e.g. 00O1r0000094WD2EAM

Create a button linking to the report

11. Select the icon at the top of the page and click **Setup**
12. Click **Object Manager**
13. Select the **Function** or **Publication** object (as necessary)
14. Click **Buttons, Links, and Actions**
15. Click **New Button or Link**



16. Enter a label – this will be the text displayed on the button
17. Select **Detail Page Button** from the Display Type options
18. Select **URL** in the Content Source field
19. Paste the following text into the area at the bottom of the page:

For a function:

#/sObject/[Report ID]/view?fv0={!OnePlace__Function__c.Id}

Replace the ID with your Report ID (copied above)

For a publication:

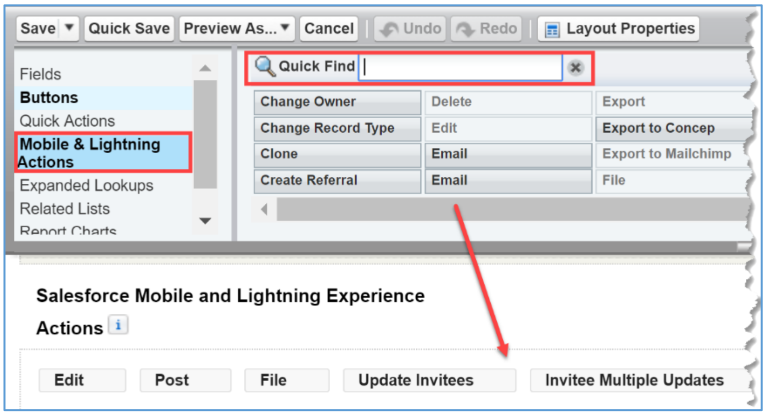
#/sObject/[Report ID]/view?fv0={!OnePlace__Publication__c.Id}

Replace the [Report ID] section with your Report ID (copied above)

20. Click **Save**

Add the button to the function or publication page layout

21. Select **Page Layouts** from the menu on the left
22. Select the relevant page layout(s) from the Page Layout menu
23. Select the **Mobile and Lightning Actions** section
24. Drag the new button to the **Salesforce Mobile and Lightning Experience Actions** section (you can use Quick Find to search)
25. Click **Save**



Configuring Referrals

When initially setting up referrals in OnePlace, follow these high-level steps (full details on each step below):

1. Update page layouts for Inbound and Outbound referrals to include the relevant fields
2. Update field security so only fields in use are visible on each relevant profile
3. Update help text on fields (if needed)
4. Add 'Referrals' related lists to Company and Contact page layouts
    a. Update to display the relevant fields
    b. Update to include the 'New' button
5. Update Lightning page layout to include referrals related list

Update page layouts for inbound and Outbound referrals

For full details on updating page layouts, please see **Page Layouts** section above.

Referrals screens would typically include the following fields:

Referrals (Inbound)	**Use and suggested Help Text on field:**
Company	Inbound: Company who is referring work to the firm Outbound: Company you are referring work to
Contact Who Referred	Contact who referred work to the firm
Referral Stage	
Referral Date	
Referred Company	Which company was referred to the firm
Referred	Which company was referred to the firm (free text)
First Name	Contact at referred company
Last Name	Contact at referred company
Potential Value	
Matter	
Potential Business	
Additional Comments	
Created by	
Last Modified By	
Record Type	

Referrals (Outbound)	**Use and suggested Help Text on field:**
Company	Inbound: Company who is referring work to the firm Outbound: Company you are referring work to
Contact Referred To	Contact the work was referred to
Referral Date	
Referred Company	Which company was referred to the firm
Referred	Which company was referred to the firm (free text)
First Name	Contact at referred company
Last Name	Contact at referred company

Potential Value	
Potential Business	
Additional Comments	
Created by	
Last Modified By	
Record Type	

Typically, the following buttons would be included on the page layout in the **Salesforce Mobile and Lightning Experience Actions section**: Edit, Post (if using Chatter) and Delete.

Update field security

For full details on updating field security, please see **Changing field level security** section for more information.

Update help text

For full details on updating help text on fields, please see **Adding help text to fields** section for more information.

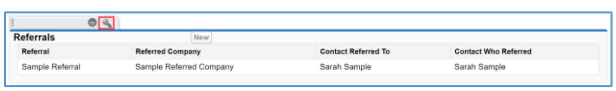
You can use the help text suggestions provided above.

Add ‘Referrals’ related list to Company and Contact page layouts

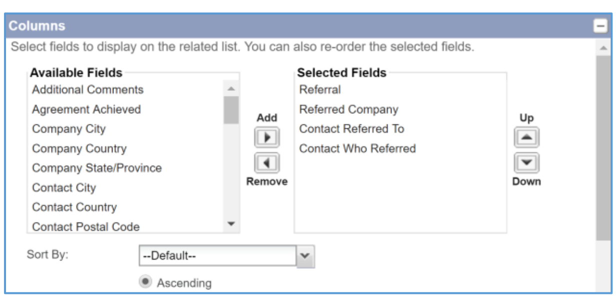
For the referrals section to be visible when viewing a company or contact, the **Referrals Related List** needs to be added to the company and contact page layouts.

For full details on adding related lists, please see **Adding fields, buttons and related lists to Page Layouts** section for more information.

1. Once you have included the **Referrals** related list on each page layout, update the fields to be displayed using the spanner icon:



2. Select the fields you want to display e.g.:



3. To allow users to create new referrals, expand the **Buttons** section and tick **New**

4. Click **OK**
5. Click **Save** on the page layout

Update Lightning page layout

You may also need to include the **Referrals** related list on the lightning page layout.

For full details on updating lightning page layouts, please see the **Lightning page layouts** section for more information.

If all related lists are not included on the lightning page layout by default, you will need to add it to each layout:

1. Whilst editing the relevant **Lightning Record Page**(s) for Companies and Contacts, on the **Related** tab, drag the **Related List – Single** option from menu on the left on to the page layout
2. On the right-hand section of the page select **Referrals** from the **Related List** drop down
3. Click **Save**
4. Click **Back**