**Standard Operating Procedure (SOP) for TeamOB CloudDB**

**1. Purpose**

This SOP provides a comprehensive guide to using TeamOB CloudDB for creating, managing, and interacting with dynamic tables and apps without coding. It covers table creation, data entry, sharing rules, events, custom menus, app creation, and API integration. This document is designed to help both new and experienced users navigate CloudDB smoothly.

**2. Scope**

This SOP applies to all TeamOB CloudDB users, including administrators, team leaders, and general users, involved in managing business data within the platform.

**3. Definitions**

* **CloudDB:** A cloud-based database service for dynamic business data management.
* **OnChange Event:** A trigger that updates fields automatically based on user input and defined operations.
* **Custom Menu:** Quick links for rapid access to essential functions within a table.
* **API:** Endpoints for integrating CloudDB tables with external systems.

**4. Roles and Responsibilities**

* **Administrator:** Manages table setup, sharing rules, and app creation.
* **Team Leader:** Manages team data, monitors records, and configures relevant settings.
* **User:** Inputs, views, and edits data based on assigned permissions.

**5. Procedure**

**5.1 Accessing TeamOB CloudDB**

1. **Login:** Access the TeamOB portal with valid credentials.
2. **Navigate:** Click on 'Cloud DB' in the main menu.
3. **Open Setup:** Click on 'Setup' to view and manage tables.

**5.2 Creating a New Table**

1. **Click on 'Add New':** Found at the top-right corner of the setup screen.
2. **Fill Table Details:**
   * **Object Name:** Enter a unique name for the table.
   * **Project:** Choose the relevant project (default is 'All').
   * **Icon:** Select an icon to represent the table.
   * **View Type:** Choose either:
     + **Tabular View:** Allows multiple entries at a time (like a spreadsheet).
     + **Form View:** Allows only one entry at a time (like a form submission).
3. **Click 'Next':** Proceed to field configuration.

**5.3 Configuring Table Fields**

1. **Add Fields:** Click 'Add Field' to create data entry points.
2. **Define Field Properties:**
   * **Field Name:** Enter the field label.
   * **Data Type:** Choose from various options:
     + **Auto:** Auto-generated values.
     + **DateTime, Date, Timestamp:** Date-based inputs.
     + **Number, Float:** Numeric values.
     + **String, Text:** Text inputs.
     + **Enum:** Dropdown of predefined values.
     + **Custom Objects:** Fetch fields from other CloudDB tables.
     + **System Table:** Fetch data from internal TeamOB tables.
     + **Formula:** Calculate values based on other fields.
     + **File:** Upload documents or media.
3. **Set Attributes:** Define field length, mark mandatory fields, and configure default values.
4. **Click 'Next':** Proceed to set sharing rules.

**5.4 Configuring Sharing Rules**

1. **Role-Based Access:** Configure who can access which records:
   * **Admin:** View all records.
   * **Team Leader:** View team records.
   * **User:** View only personal records.
2. **Column Visibility:** Set each field as 'Visible', 'Hidden', or 'Read-Only' for each role.
3. **Delete Permissions:** Enable delete rights for specific roles.
4. **Publish the Table:** Enable the 'Publish' option to activate the table.
5. **Submit the Table:** Finalize the table creation.

**5.5 Managing and Viewing Tables**

1. **View Tables:** In the 'Setup' section, click 'View' to see the table.
2. **Enter Data:** In the 'Create' tab:
   * Fill out the fields.
   * Click 'Submit' to save data.
3. **Edit Data:** Double-click on a field value to modify it.
4. **Search & Filter:**
   * Use the search bar for keywords.
   * Filter records by date range.

**5.6 Using OnChange Events**

1. **Trigger Field Updates:** Automate field changes based on user input.
2. **Set OnChange Parameters:**
   * **Field:** The field that triggers the event.
   * **Target Field:** The field that gets updated.
   * **Target:** The action to perform.
   * **Target Value:** The query or operation to run.
3. **Example:** If entering a quantity in 'Field A', automatically calculate the total price in 'Field B'.

**5.7 Custom Menus**

1. **Add Quick Links:** Create shortcuts for frequently accessed functions.
2. **Configure Menu Items:** Link to external pages or specific table views.
3. **Save the Menu:** Apply the custom menu to the table.

**5.8 Creating Apps**

1. **Navigate to 'Apps':** Below the 'Setup' section.
2. **Add New App:**
   * Enter the app name.
   * Choose an icon.
   * Check 'Top Nav' to add the app to the top navigation bar.
   * Add a description.
3. **Select Tables:**
   * Shift desired tables from the left panel to the right.
   * Use arrow buttons to move tables in or out.
4. **Submit the App:** Finalize app creation. The app will appear in the app list and navigation bar.

**5.9 API Integration**

1. **Access API Details:**
   * Go to 'Setup' and click 'Properties' for the desired table.
2. **Use Endpoints:**
   * **GET:** Retrieve table data.
   * **POST:** Add new records.
   * **PUT:** Update existing records.
   * **DELETE:** Remove records.
3. **Integrate with External Systems:** Use API keys and endpoints for secure data exchange.