Inline Edit Related List for Salesforce

(This guide is intended for Salesforce System Admins.)

Installation

1. Package installation links – Login to salesforce as a System Administrator and select one of the links below:
   - Production/Developer Org –
     https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0Y000002KNp5
   - Sandbox Org –
     https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0Y000002KNp5

   On the installation page - Select to "Install for All Users" and Click "Install".

Part 1- Create Visualforce Page for Page Layout

1. Go to https:// <instance>.salesforce.com/apex/itmyway-apps__RelatedListVFGenerator
   Replace the <instance> with your specific org instance details. locate your Org instance by looking at the URL while logged into Salesforce. It will be the first part of the URL. For example:

   If you use a custom domain, your instance will be in the form of "CompanyName.my". For example:

2. In the first field write the API name of the master (parent) object

   For example : Account

3. In the second field write the API name of the child object you want to show as lines in the related list.
   For example: Contact

4. The third field is needed only if you want to create a related list between sibling objects meaning objects with the same parent (ex: contact with a related list of Opportunities).

Related List VisualForce Generator

Enter Parent Object Api Name to show Related List on:
Account

Enter Child Object Api Name For Related Records:
Contact

Brother Related Lookup Field Name (if needed - in Standard :Accountid ,in Custom: Object__c):
* if you want to make related list of same object with same parent

VisualForce Page:

```
<apex:page standardController="Account" sidebar="false" showheader="false">
    <script>
    window.onload=function start(){
        window.location.href='/apex/itmyway-apps__DynamicRelated?id={!Account.id}&obj=Account-
Contact&theme='+(document.referrer.includes('lightning')?'true':'false');
    }
    </script>
</apex:page>
```

5. Copy the content of the "visualforce page" field and go to Setup → Visualforce Pages

Click "New" give it a name (Ex: Account_inline_related) and a label and paste the content in the Visualforce Markup (enable "Available for Lightning Experience, Lightning Communities, and the mobile app" if using Lightning) and Click Save.

6. Add the Visulaforce Page from step 5 to a section on a Page layout of the master (parent) object (Account in our example).
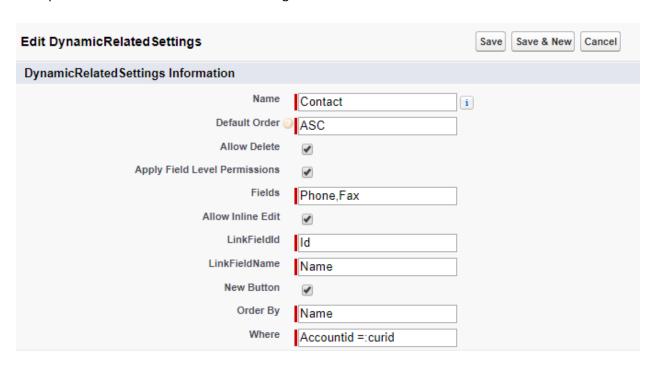
Part 2 - Assign a Custom Setting to the Visualforce page

1. Go to Setup → Custom Settings, and Click "Manage" next to "DynamicRelatedSettings"

   Then Click "New".

2. Fields (see screenshot below):
   2.1. Name → Should be the name of the Visualforce Page you created. *Must
   2.2. Object API Name → Should be the name of the Child Object to create list from (Contact in our example).(if need 2 different child related list for 2 parent object the name should be Parent-Child, like Account-Contact) *Must
   2.3. Default Order → Default is "ASC" it can also be "DESC" (ascending and descending). *Must
   2.4. Allow Delete → will allow a fast "Del" on each row in the list.
   2.5. Apply Field Level Permissions → will apply per User Permissions when viewing.
   2.6. Fields → all fields beside name and id with comma separated (table field order will be the same. Without space between fields and comma separated.)
   2.7. Allow Inline Edit → will allow users to double click on fields for fast update.
   2.8. LinkFieldId → usually "id" field to create link to them.
   2.9. LinkFieldName → usually "Name" for the name in the links.
   2.10. New Button → will allow fast adding of rows.
   2.11. Order By → the Field that Orders the List by. *Must
   2.12. Where → the fields to filter the list by. Standard filter is by parent id for example: "Accountid:curid". *Must
   - If you want to add additional filters to the list, add them after :curid
     For example: "Accountid:curid" and "Title"="CEO" – this will filter the contact related list to CEO's only.
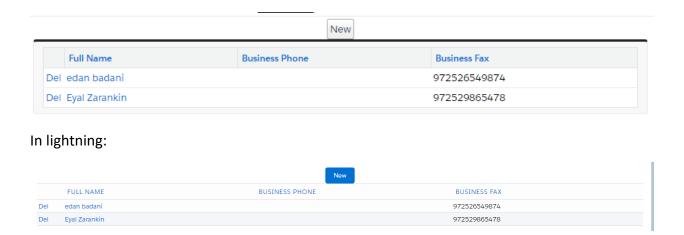   2.13. Limit → the limit records by default per page.

2.14. LinkFieldidFormula -> To send the record to a custom Apex page or external url (ex: https://google.com leave blank by default).

2.15. LinkFieldNameFormula -> To add a static text before the record name (ex: leave blank by default).

Example Contacts for Account Custom Settings:

In classic:

New

	Full Name	Business Phone	Business Fax
Del	edan badani		972526549874
Del	Eyal Zarankin		972529865478

In lightning:

New

	FULL NAME	BUSINESS PHONE	BUSINESS FAX
Del	edan badani		972526549874
Del	Eyal Zarankin		972529865478

If you need to create multiple related lists for the same child object on different parent objects (Account with Tasks AND Opportunity With Tasks) you must name the custom settings for both using "parent obj. Name-Child Obj. Name" For example: "Account-Task" & "Opportunity-Task"

DynamicRelatedSettings Detail

Back to List

Edit

Name	Account-Task		Default Order	ASC
Allow Delete			Apply Field Level Permissions	✓
Fields	ActivityDate,OwnerId,Description		Allow Inline Edit	✓
Limit	50		LinkFieldId	Subject
LinkFieldName	Id		New Button	✓
Order By	ActivityDate		Where	AccountId=:curid