**Salesforce Indicators Social Housing Recipe**

Salesforce Indicators is a Lightning Component that uses Custom Metadata to show a series of visual alerts on standard and custom component Lightning Pages. This allows Salesforce users to easily visualize key information without having to scroll down to different sections of the page.

General Notes on how to install the application are provided [here](https://sfdo-community-sprints.github.io/indicators-documentation/docs/install-salesforce-indicators/).

Three recipes have been provided which demonstrate the capabilities of the package specific to social housing.

**Person Alerts**

This provides a series of queries against common tenant attributes.

This is made up of a series of queries which look for different features.

*Count High Priority Alerts* – indicates if there is at least one high priority alert against the tenant. This is based on a review of entities in the Household Alerts entity. To refine the criteria, simply update the roll up summary to refer to your required formula. The position of this field is always shown as the first item in the list.

*Arrears Net HB* – this shows an alert (money bag) if there is an arrear greater than a configurable amount against a pre-stored field.

*Count Service Adjustments* – this renders an indicator if there is at least one service adjustment against the tenant.

*Is Deceased* – this indicates if the tenant is deceased via a formula field which refers to a custom field (e.g. if the Date Of Death Is populated, it is assumed that the tenant has died). For example, the formula could be set to NOT ISBLANK(TEXT( Date\_Of\_Death\_\_c))

*Person Alert* – this illustrates a simple implementation referring to a multi-select picklist to render other useful indicators.

The fields in support of these queries are included via an .xml file which can be uploaded via the [Ant Migration Tool](https://developer.salesforce.com/docs/atlas.en-us.daas.meta/daas/meta_development.htm) or [Salesforce CLI](https://developer.salesforce.com/docs/atlas.en-us.sfdx_setup.meta/sfdx_setup/sfdx_setup_install_cli.htm).

**Person Comms**

This indicator item provides a useful set of icons which can be easily used with this application. This has a set of 5 icons which cover off SMS, Post, WhatsApp, Phone and Email. This is driven by a Communication Preference picklist field (which is also included in the Account .xml file).

**Properties**

This indicator item provides a useful set of icons which can be easily to illustrate features of a property. These are currently set against a multi-select picklist, but the logic could be easily extended to make use of other fields in a similar way to those shown against the Person Account entry. To illustrate the use of asset indicators, a custom field Property\_Notification\_\_c has been created (which can be found in Asset .xml file).

**Data Loading**

To load the custom metadata you will need to install another AppExchange package as custom metadata cannot be directly uploaded via the Data Loader. One such package is available [here](https://appexchange.salesforce.com/appxListingDetail?listingId=a0N4V00000HrQTdUAN). The data needs to be loaded in a set order to ensure referential integrity is enforced. As such, Indicator Bundle and Indicator Items need to be loaded first, followed by Indicator Item Extension and Indicator Bundle Item. Refer to the Custom Metadata Type Loader Guide available [here](https://appexchange.salesforce.com/image_host/f8a5d6f2-5d41-4439-9cad-d851470c34ca.pdf) for further details on the format of the data files for load. Please note the file needs to be in .csv format, if it is in CSV UTF8 the insert will fail with an error stating that there is an issue with the API field name.

When loading the data, be sure to refer to the generated Salesforce user email as it identifies if there were failures on upload. Updates to the .csv files can also be applied by reloading the files through the UI.

**Data Structures**

We make use of an object Housing Alerts to identify different types of red flags and service adjustments that are captured against a tenant. This object can be installed using the Salesforce metadata API using the Housing\_Alert .xml script.

Optionally, you can also load the supporting Asset and Account fields by referencing the Asset and Account .xml files respectively.

Also ensure that any new fields added are allocated to the appropriate profile or permission set.

Once the Housing Alerts entity has been added, add it as a related list to an existing Account page so you can clearly see associated housing tenant alerts.

**Supporting Notes**

The Lightning Design System has a set of icons which can be easily used with this application. These are viewable [here](https://www.lightningdesignsystem.com/icons/#site-main-content).

Your own icons can also be easily added. In our example, we host these in a public S3 bucket on AWS. To reference the icon simply update the Image field on the Indicator Item Extension rather than the Icon Value.

Formula fields referring to a Boolean value behave slightly differently, these require the entry to be set directly against the Indicator Item rather than via a query on the Item Extension, refer to Account Is Deceased as an example of how this works.

Person Account fields also need to be referenced in a different way, these are done via setting a value on the Indicator Item and referencing it via the Advanced Field section rather than the Field metadata setting.

To review the indicators that have been setup just locate “Indicator Setup” via the navigation waffle and select the appropriate bundle. Three bundles have been provided: Person Alerts (a set of indicators against an Account), Person Comms (used to show the Communication Preference against an Account) and finally, Properties (a simple multi-select picklist against the Asset).

The example below illustrates the Person Alerts bundle against the Account.

A screenshot of a computer

Description automatically generated

To add the indicator component to your page, open up the respective Lightning Page, e.g. Asset or Account and add the “Indicator Bundle” component. For example, on the Account we would suggest adding the Person Alert and Person Comms components to the Page Layout.

An example of the properties bundle shown against the Asset is illustrated below.

A close-up of icons

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This is a powerful feature and can be applied to both standard and custom objects. For more granular information relating to the Indicator Lightning Component please refer [here](https://sfdo-community-sprints.github.io/indicators-documentation/docs/install-salesforce-indicators/).

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