**Important Note – From LUI 2.43 onwards we will need to import UI Rules and UI actions. This step needs to be done for all upgrades and installation.**

**Rootstock Lightning Toolkit:**

Installation URL 1.23: [https://login.salesforce.com/packaging/installPackage.apexp?p0= 04t3p000000xalgAAA](https://login.salesforce.com/packaging/installPackage.apexp?p0=04t3p000000xZzSAAU)

Toolkit 1.46

1.46 - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4y000000kpBcAAI

**Installation Steps:**

1. Assign the permission set "Rootstock Lightning Toolkit User" to the users in the org. This enables the "Run Flows" permission. – Skip this

**Rootstock ERP Lightning Native Experience(LUI):**

Installation URL 2.25: [https://login.salesforce.com/packaging/installPackage.apexp?p0= 04t3p000000xam0AAA](https://login.salesforce.com/packaging/installPackage.apexp?p0=04t3p000000xa0BAAQ)

**Installation Steps:**

1. Assign the "Rootstock Non-Admin User" to the users that are supposed to use the ERP LUI. – Skip this
2. Override standard "New" and "Edit" buttons to use "rootstock:RecordEdit" lightning component for the following objects:  
     
   Work Orders   
   Sales Order Header  
   Sales Order Line  
   Sales Order Override Address  
   Sales Order Package  
   Shipper Line

**LUI 2.34 – Minimum ERP 21.90 is needed**

2.34 <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4y000000tD4gAAE>

**LUI 2.43 – Minimum ERP 21.90 is needed**

LUI 2.43 - <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4y000000kpB3AAI>

Toolkit 1.46

[https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4y000000kpBcAAI](https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4y000000kpB3AAI)

1. Import UI Rules and UI Actions -

### Dataload Custom UI Rules and Custom UI Actions

We maintain two separate CSV data load files contains all UI rules and actions that we release. We have an external Id field in both objects which will be helpful for easier dataloading into customer orgs. Using this external Id upsert mechanism we can create new records, update existing records (for example, deactivating a rule/action). **These rules and actions will be dataloaded in customer orgs for the first install and/or each package upgrade** **every time**.

#### Master CSV files

 

#### Import using UI Rules and UI Actions using Data Loader

##### Import UI Rule

1.Open Salesforce Data Loader, click Upsert and login into your salesforce org.

2. Select the custom object as “Custom\_UI\_Rule\_\_c” as below to import the data into and choose the CSV file to be loaded.

3. Select “Unique\_Key\_\_c” as the external ID field as below for the upsert action to work.

4. Click on the “Auto-Match Fields to Columns” button on the below mapping dialog and verify all the fields being imported are mapped correctly. Click on “Ok” after verifying the field mappings.

5. Click on “Create or Edit a Map” button.

6. Click “Next” button on the below screen and proceed – Dataloader will import the UI rule records into your org.

##### Import UI Actions

1. Open Salesforce Data Loader, click Upsert and login into your salesforce org.

2. Select the custom object as “Custom\_UI\_Action\_\_c” as below to import the data into and choose the CSV file to be loaded.

3. Select “rootstock\_Unique\_Key\_\_c” as the external ID field for the upsert action to work.

4. Select “rootstock\_Unique\_Key\_\_c” as the external ID field to use for matching UI\_Rule\_r.

4. Click on “Create or Edit a Map” button.

5. Click on the “Auto-Match Fields to Columns” button on the below mapping dialog and verify all the fields being imported are mapped correctly. Click on “Ok” after verifying the field mappings.

6. Though the field mappings are correctly auto mapped, still the UI Rule parent field mapping is not mapped correctly with the Unique\_Key\_\_c field. So drag rootstock\_\_UI\_Rule\_\_r:rootstock\_\_Unique\_Key\_\_c field from the top section to the botton ROOTSTOCK\_\_UI\_RULE\_\_R.ROOTSTOCK\_\_UNIQUE\_KEY\_\_C field mapping.

7. Make sure the ROOTSTOCK\_\_UI\_RULE\_\_R.ROOTSTOCK\_\_UNIQUE\_KEY\_\_C column is mapped with rootstock\_\_UI\_Rule\_\_r:rootstock\_\_Unique\_Key\_\_c.

8. Click “Next” button on the below screen and proceed – Dataloader will import the UI Action records into your org.

**IMPORTANT**: Do not open & save the exported CSV file(s) in Microsoft Excel software as it will corrupt the csv data format(quote, line ending characters, etc) which will cause issues while importing the csv back into org.

Detailed information for importing UI Rules and UI actions with screenshots can be found in “Rootstock Custom UI Rules and Actions – Design.doc” document