Create Custom Fields and Corresponding Workflow Rules in Fonteva

⚠ Higher Logic will be creating any custom fields/workflows during implementation. These directions are here for troubleshooting /information.

To determine if a user on the online community platform has updated any information within Salesforce, the Higher Logic Fonteva integration requires the creation of custom fields on various objects and corresponding workflow rules. **To follow this guide, please make sure you are using Salesforce's classic view.**

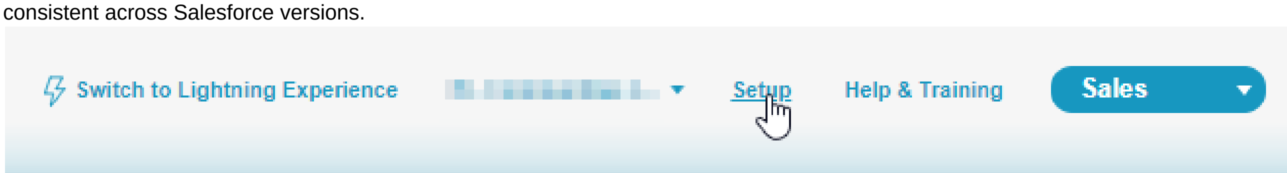
Creating a custom field

Higher Logic's periodic refresh service queries objects based on a custom datetime field. This field is used to determine if a user requires an update on the Higher Logic side. Custom fields will need to be created on all objects that are within scope for the integration.

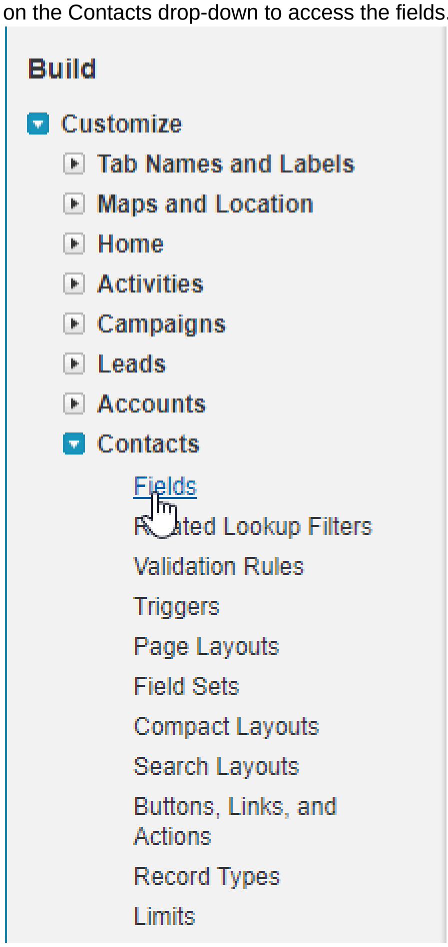
For example, if Higher Logic is extracting badges, a custom field will need to be created on the Badge object. **The directions below cover how to create a custom field that will live on the Contact object.**

ⓘ There will be at least 1 custom field that needs to be created for the integration. This custom field will need to live on the Contact object.

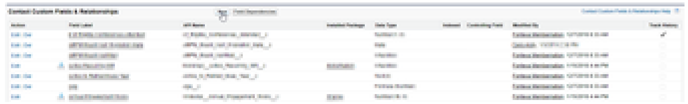
1. Navigate to "Setup" - located in the top right corner of the screen. Sometimes it can be in a drop down but the location stays fairly consistent across Salesforce versions.



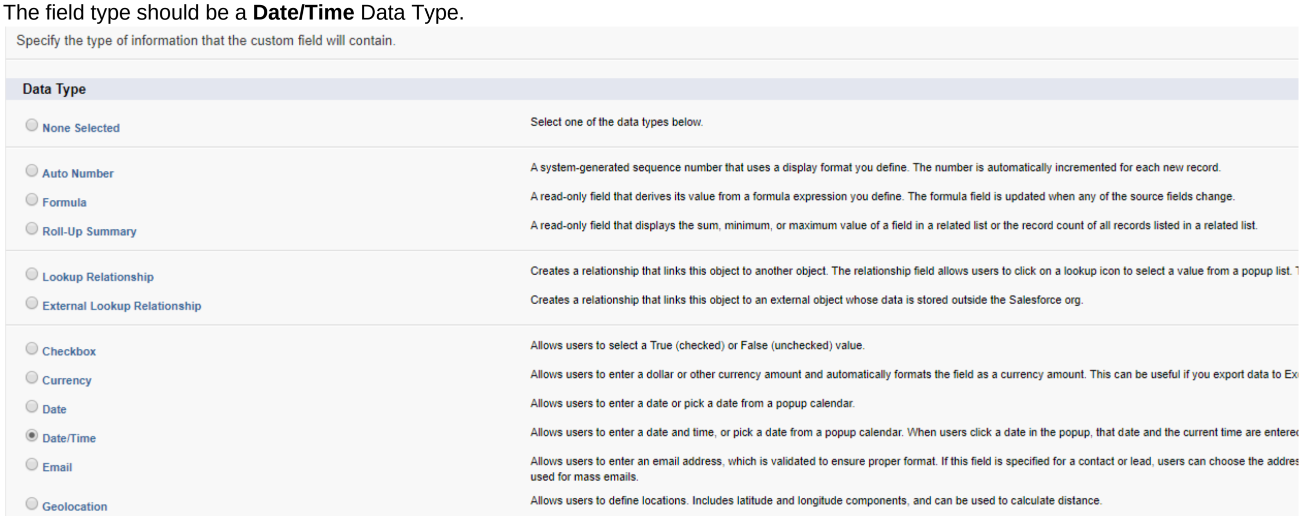
2. On the left side of the page contains a Quick Start menu. Scroll down to the Build section and click on the Customize drop-down. Click on the Contacts drop-down to access the fields.



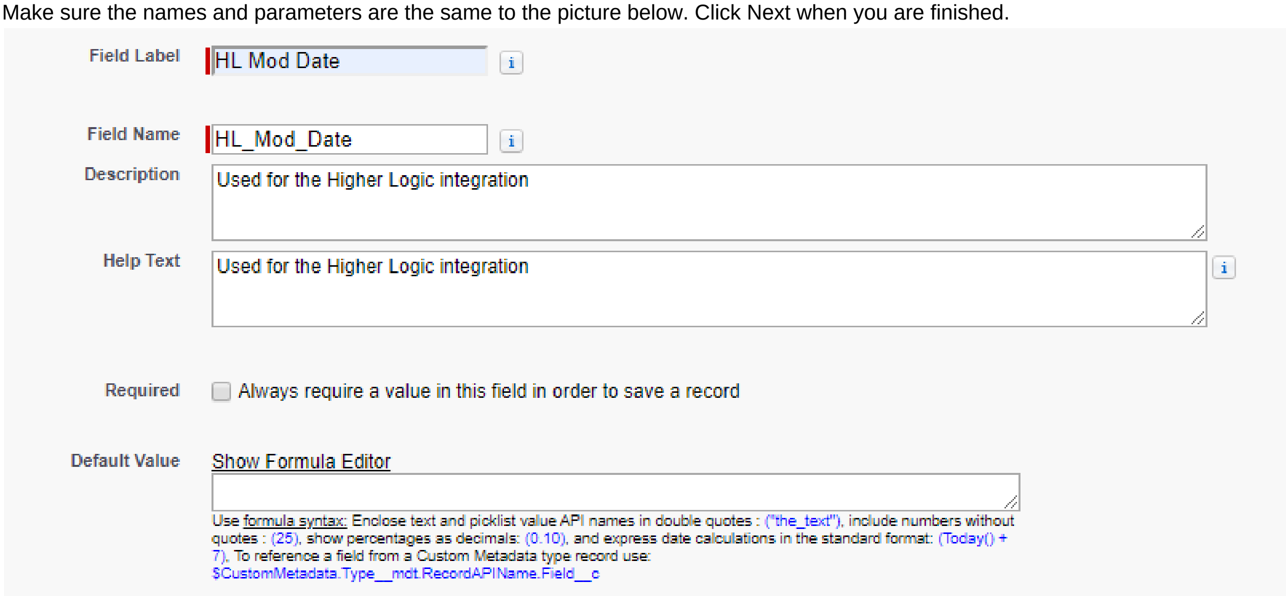
3. Scroll down to see the Contact Custom Fields & Relationships - click on "New".



4. The field type should be a **Date/Time** Data Type.



5. Make sure the names and parameters are the same to the picture below. Click Next when you are finished.



6. Set the Profile level security. **The profile that the Higher Logic user is using needs to be set to "Visible" or the integration will not work**. Hit Next when you are done.

Field-Level Security for Profile	Visible	Read-Only
[illegible]	☐	☐
[illegible]	☐	☐
[illegible]	☐	☐
[illegible]	☐	☐
Contract Manager	☐	☐
Customer Community Login User	☐	☐
Customer Community User	☐	☐
Finance Platform User	☐	☐
Fonteva Customer Community Login User	☐	☐
Fonteva Customer Community User	☐	☐
Fonteva Partner Community Login User	☐	☐
Fonteva Partner Community User	☐	☐
[illegible]	☑	☐
[illegible]	☐	☐
[illegible]	☐	☐
[illegible]	☐	☐
Marketing User	☐	☐
OrgSource	☐	☐
Partner Community Login User	☐	☐
Partner Community User	☐	☐
Read Only	☐	☐
Solution Manager	☐	☐
Standard Platform User	☐	☐
Standard User	☐	☐
System Administrator	☑	☐

7. Remove it from any Layout (all of them will be checked by default). This field should not be disabled on any public facing layout/page. Click Save when you are finished.

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field	Page Layout Name
☐	[illegible]
☐	[illegible]
☐	[illegible]
☐	[illegible]

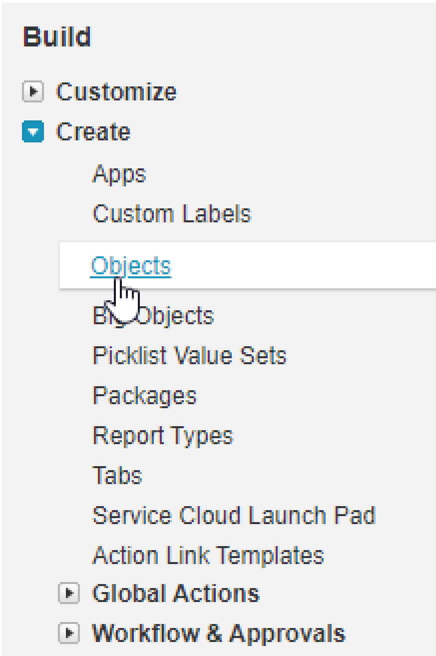
8. After saving, you should see that the field has been created under Contact Custom Fields & Relationships.

Edit | Del	HL Mod Date	HL_Mod_Date__c	Date/Time	[illegible] 12/9/2019 12:41 PM

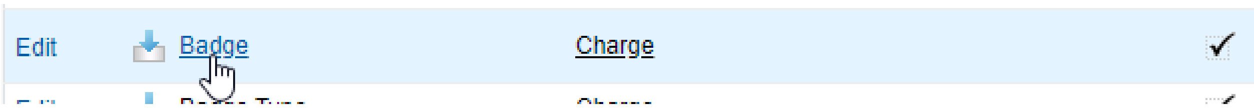
Again these instructions were only for the Contact object. A custom field will need to be created for every object. See below for the other objects and where to find them in the Salesforce Setup view. To create a custom field on Account is the exact same process but you click on the Accounts drop down instead of Contacts in step 2.

Creating a custom field on the Fonteva objects

1. On the left side of the page contains a Quick Start menu scroll down to the Build section. To access the other Fonteva objects, you'll need to navigate to the Create drop-down and go to Objects.



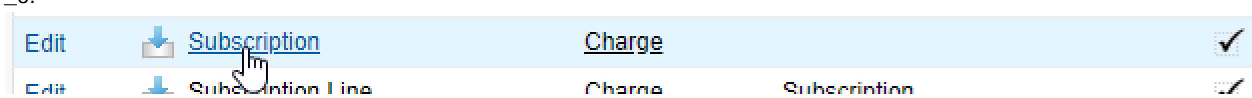
2. **Badges** should be part of the installed package, Charge. Please check the API Name as it should be `OrderApi__Badge__c`.



3. Community Group Member should be part of the installed package, Engage. It should have a master object of Community Group. Please check the API Name as it should be

   `PagesApi__Community_Group_Member__c`.

4. Subscription should be part of the installed package, Charge. Please check the API Name as it should be `OrderApi__Subscription__c`.

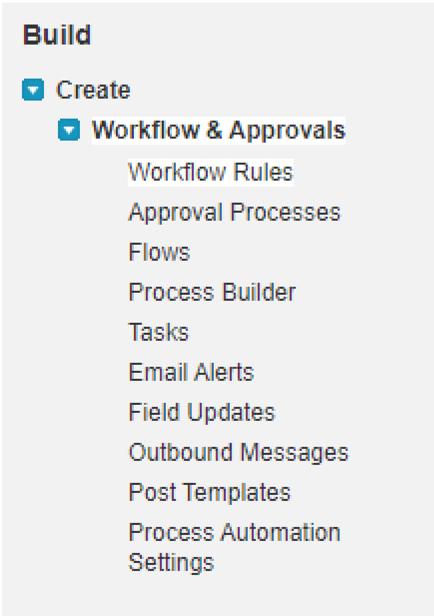


Creating the corresponding workflow rule

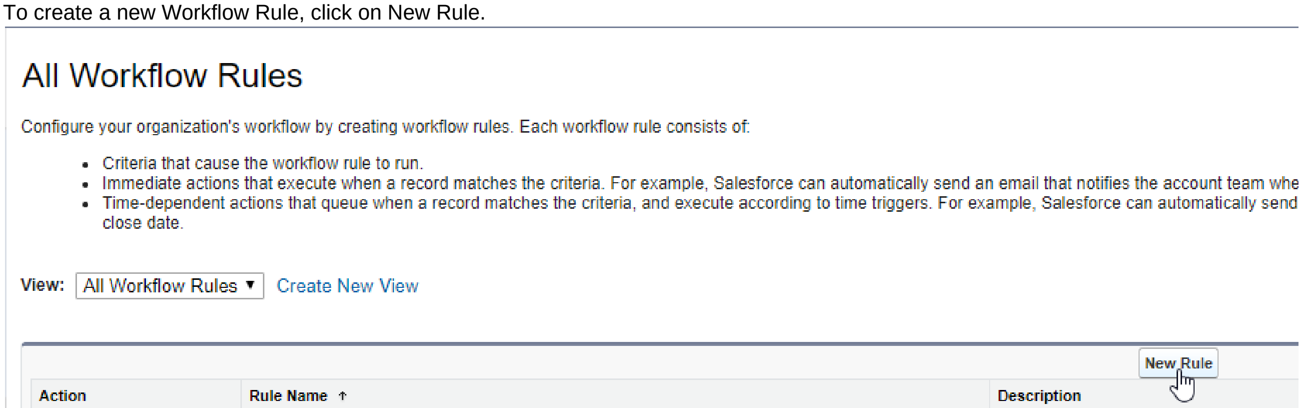
After all the custom fields have been created in all the right objects, the corresponding workflow rules need to be created with the logic generated from the tool.

> ⚠ The custom fields need to be generated first or they will not appear when configuring the workflow rules.

1. Back to the Quick Start menu, scroll down to the Build section. Under the Create drop-down should have the Workflow & Approvals drop-down. Click on Workflow Rules.



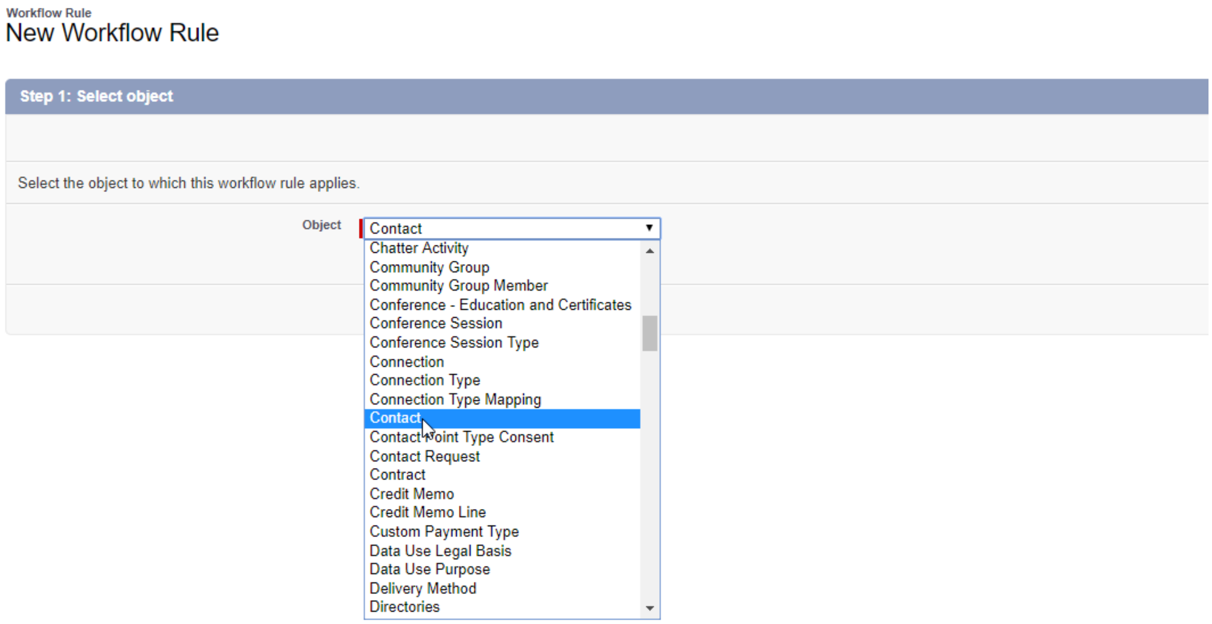
2. To create a new Workflow Rule, click on New Rule.



3. Scroll down to find Contact.

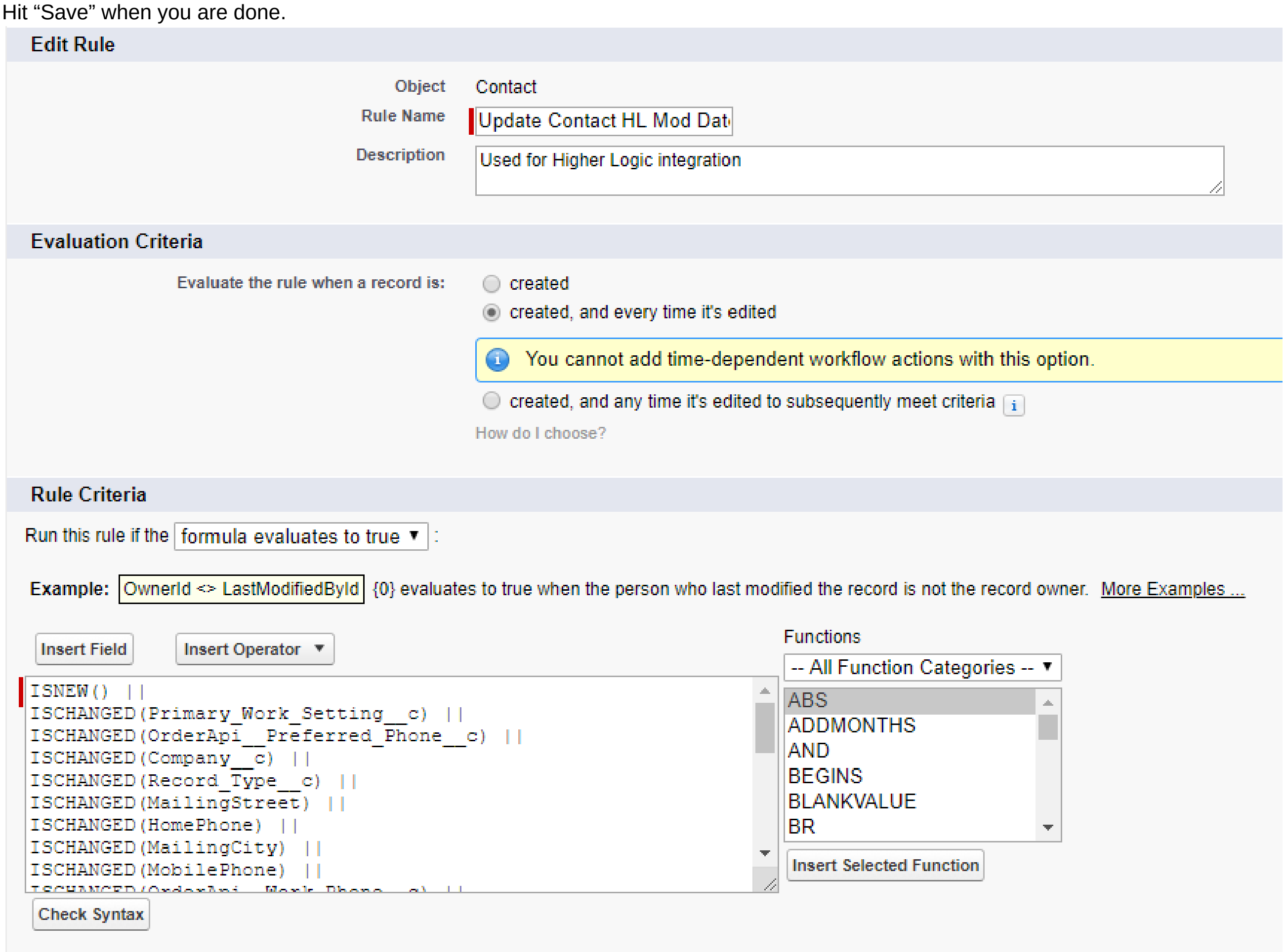
For the other Fonteva objects, the main Object should be called:

- Account = Account
- Badge = Badge (Installed Package: Charge)
- Community Group = Community Group Member
- Subscription = Membership OR Subscription (Installed Package: Charge) OR Subscription

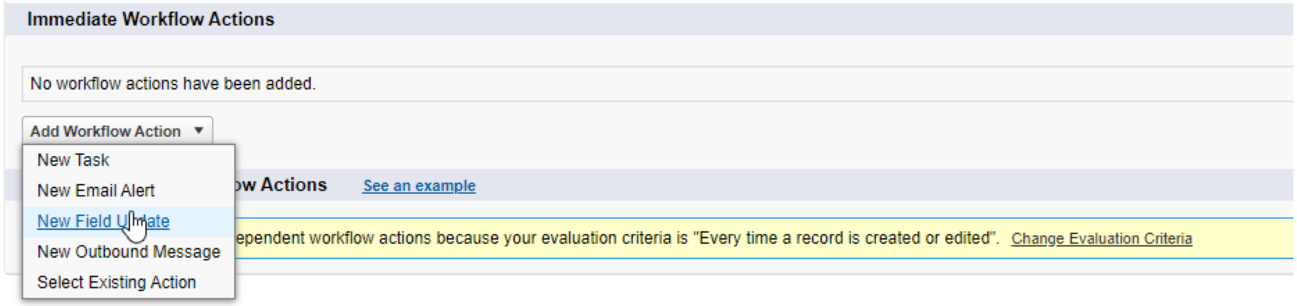


4. The rule is named “Update {Object} HL Mod Date”.
   - Check “created, and every time it’s edited” for Evaluation Criteria
   - Set the Rule Criteria to “formula evaluates to true”. The logic should have been generated from Higher Logic. Please contact your project manager if you do not have the logic.

   Hit “Save” when you are done.

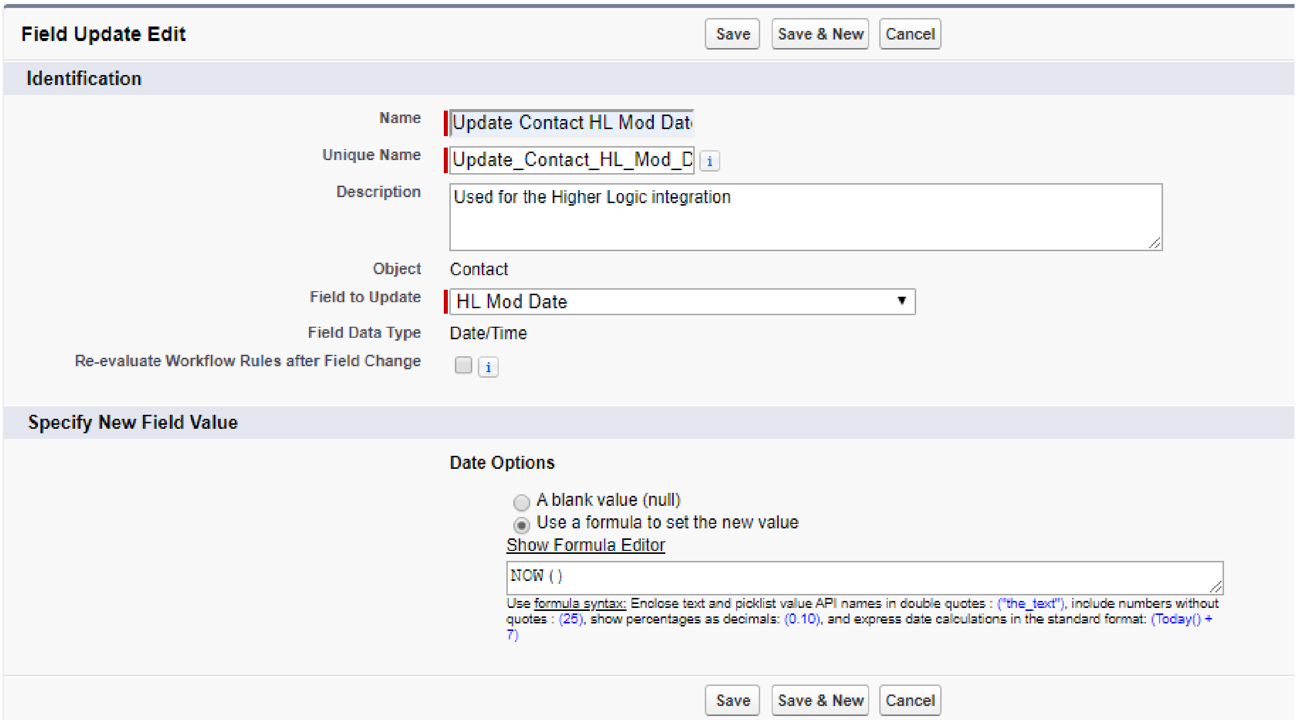


5. The workflow logic is set. Under “Immediate Workflow Actions”, select “New Field Update”.

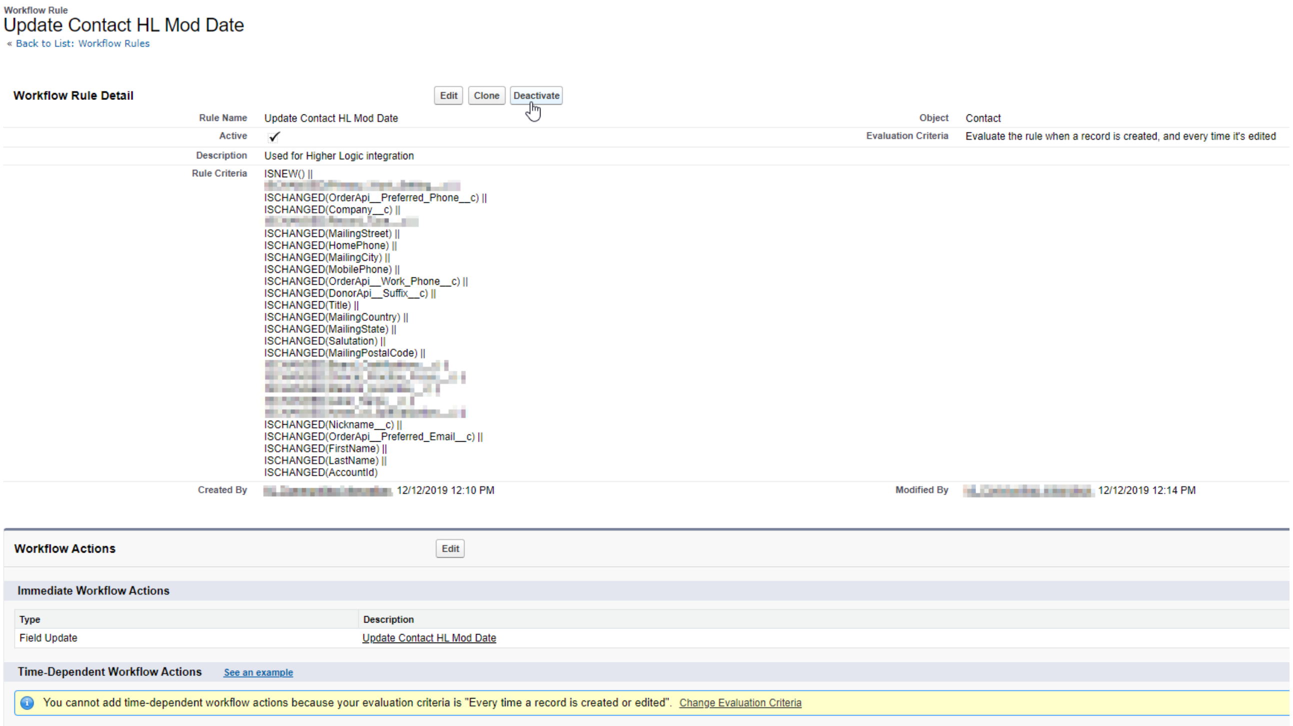


6. Field To Update should be set to the custom field name that was created. Should be called “HL Mod Date”.

   Make sure that “Use a formula to set the new value” is checked. The formula should be `NOW()`. Press Save once you are finished.



7. Last step is to Activate the workflow rule. Press Activate next to Clone. The Active field should be checked.



Please do this for all of the other objects that have a custom field. Make sure the right object was selected back in step 3. Once this is done, please contact your project manager. They will need to do some finishing touches to the integration.