

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.

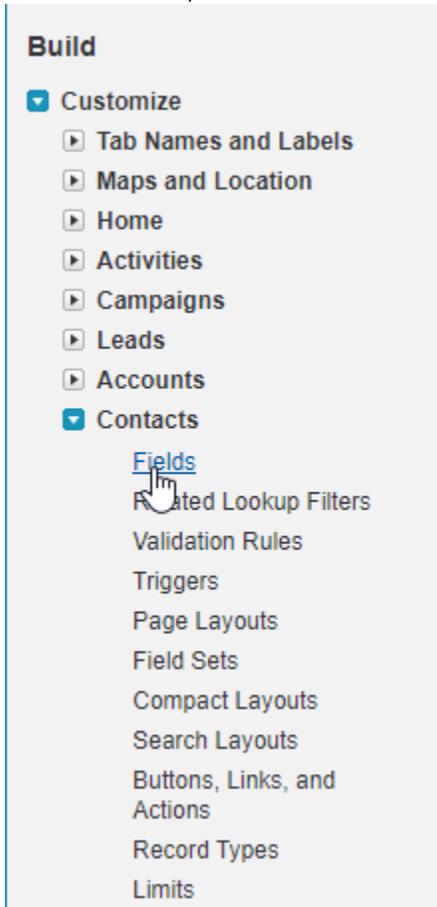
For example, if Higher Logic is extracting badges, a custom field will need to be created on the Badge object. **The directions below cover how to create a custom field that will live on the Contact object.**

 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".

Field Name	Field Label	API Name	Field Type	Required	Controlling Field	Modified By	Track History
HL_001	HL Mod Date	HL_Mod_Date	Date/Time	Yes		System Administrator	1/17/2019 10:00 AM
HL_002	HL Mod Date	HL_Mod_Date	Date/Time	No		System Administrator	1/17/2019 10:00 AM
HL_003	HL Mod Date	HL_Mod_Date	Date/Time	No		System Administrator	1/17/2019 10:00 AM
HL_004	HL Mod Date	HL_Mod_Date	Date/Time	No		System Administrator	1/17/2019 10:00 AM
HL_005	HL Mod Date	HL_Mod_Date	Date/Time	No		System Administrator	1/17/2019 10:00 AM
HL_006	HL Mod Date	HL_Mod_Date	Date/Time	No		System Administrator	1/17/2019 10:00 AM
HL_007	HL Mod Date	HL_Mod_Date	Date/Time	No		System Administrator	1/17/2019 10:00 AM
HL_008	HL Mod Date	HL_Mod_Date	Date/Time	No		System Administrator	1/17/2019 10:00 AM
HL_009	HL Mod Date	HL_Mod_Date	Date/Time	No		System Administrator	1/17/2019 10:00 AM
HL_010	HL Mod Date	HL_Mod_Date	Date/Time	No		System Administrator	1/17/2019 10:00 AM

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

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox Allows users to select a True (checked) or False (unchecked) value.

Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel.

Date Allows users to enter a date or pick a date from a popup calendar.

Date/Time Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, that date and the current time are entered.

Email Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address used for mass emails.

Geolocation Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

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

Field Label i

Field Name i

Description

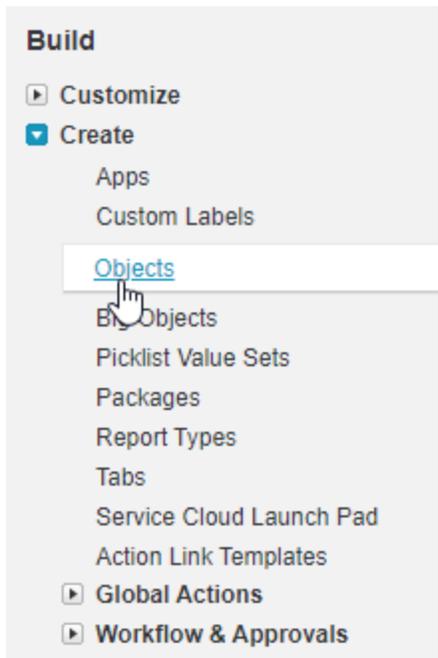
Help Text i

Required Always require a value in this field in order to save a record

Default Value

Use [formula syntax](#): Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

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.



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

Edit	↓	<u>Badge</u>	<u>Charge</u>	✓
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- 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.

Edit	↓	<u>Community Group Member</u>	<u>Engage</u>	<u>Community Group</u>	✓
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- Subscription should be part of the installed package, Charge. Please check the API Name as it should be OrderApi__Subscription__c.

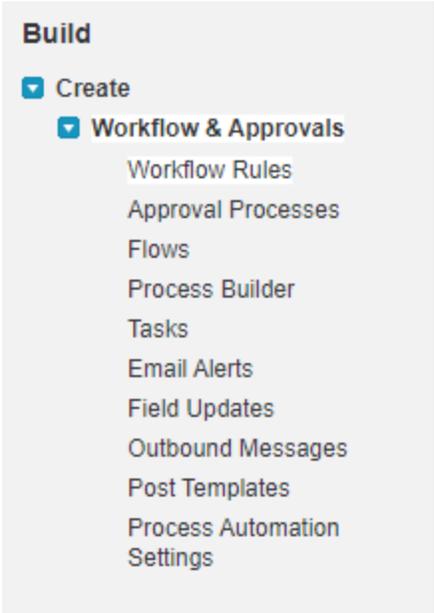
Edit	↓	<u>Subscription</u>	<u>Charge</u>	✓
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Creating the corresponding workflow rule

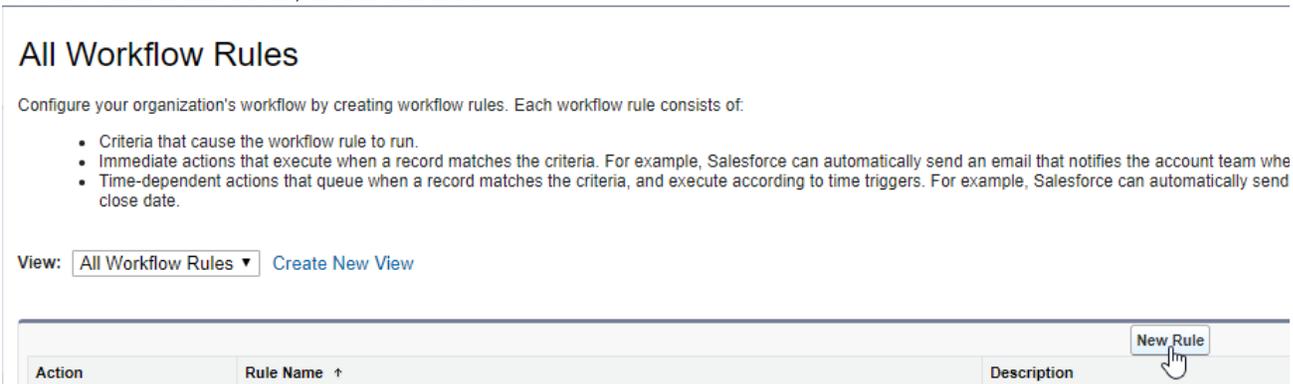
After all the custom fields have been created in all the right objects, the corresponding workflow rules need to be created with the logic generated from the tool.

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

- 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

Workflow Rule
New Workflow Rule

Step 1: Select object

Select the object to which this workflow rule applies.

Object: **Contact**

- Contact
- Chatter Activity
- Community Group
- Community Group Member
- Conference - Education and Certificates
- Conference Session
- Conference Session Type
- Connection
- Connection Type
- Connection Type Mapping
- Contact
- Contact Point Type Consent
- Contact Request
- Contract
- Credit Memo
- Credit Memo Line
- Custom Payment Type
- Data Use Legal Basis
- Data Use Purpose
- Delivery Method
- Directories

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.

Edit Rule

Object: Contact

Rule Name: Update Contact HL Mod Date

Description: Used for Higher Logic integration

Evaluation Criteria

Evaluate the rule when a record is:

- created
- created, and every time it's edited
- created, and any time it's edited to subsequently meet criteria

You cannot add time-dependent workflow actions with this option.

How do I choose?

Rule Criteria

Run this rule if the **formula evaluates to true**:

Example: OwnerId <> LastModifiedById {0} evaluates to true when the person who last modified the record is not the record owner. [More Examples...](#)

Insert Field Insert Operator

```
ISNEW() ||
ISCHANGED(Primary_Work_Setting__c) ||
ISCHANGED(OrderApi__Preferred_Phone__c) ||
ISCHANGED(Company__c) ||
ISCHANGED(Record_Type__c) ||
ISCHANGED(MailingStreet) ||
ISCHANGED(HomePhone) ||
ISCHANGED(MailingCity) ||
ISCHANGED(MobilePhone) ||
ISCHANGED(OrderApi__Work_Phone__c) ||
```

Check Syntax

Functions

- All Function Categories --
- ABS
- ADDMONTHS
- AND
- BEGINS
- BLANKVALUE
- BR

Insert Selected Function

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

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▾

- New Task
- New Email Alert
- New Field Update**
- New Outbound Message
- Select Existing Action

Workflow Actions [See an example](#)

dependent workflow actions because your evaluation criteria is "Every time a record is created or edited". [Change Evaluation Criteria](#)

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.

Field Update Edit Save Save & New Cancel

Identification

Name: Update Contact HL Mod Date

Unique Name: Update_Contact_HL_Mod_D i

Description: Used for the Higher Logic integration

Object: Contact

Field to Update: HL Mod Date ▾

Field Data Type: Date/Time

Re-evaluate Workflow Rules after Field Change i

Specify New Field Value

Date Options

A blank value (null)

Use a formula to set the new value

[Show Formula Editor](#)

NOW ()

Use [formula syntax](#); Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7)

Save Save & New Cancel

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

Workflow Rule
Update Contact HL Mod Date

[Back to List: Workflow Rules](#)

Workflow Rule Detail Edit Clone Deactivate

Rule Name	Update Contact HL Mod Date	Object	Contact
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and every time it's edited
Description	Used for Higher Logic integration		
Rule Criteria	ISNEW() ISCHANGED(OrderAppl__Preferred_Phone__c) ISCHANGED(Company__c) ISCHANGED(MailingStreet) ISCHANGED(HomePhone) ISCHANGED(MailingCity) ISCHANGED(MobilePhone) ISCHANGED(OrderAppl__Work_Phone__c) ISCHANGED(DonorAppl__Suffix__c) ISCHANGED(Title) ISCHANGED(MailingCountry) ISCHANGED(MailingState) ISCHANGED(Salutation) ISCHANGED(MailingPostalCode) ISCHANGED(Nickname__c) ISCHANGED(OrderAppl__Preferred_Email__c) ISCHANGED(FirstName) ISCHANGED(LastName) ISCHANGED(AccountId)		
Created By	HL_Combustion_Administrator	Modified By	HL_Combustion_Administrator
	12/12/2019 12:10 PM		12/12/2019 12:14 PM

Workflow Actions Edit

Immediate Workflow Actions

Type	Description
Field Update	Update Contact HL Mod Date

Time-Dependent Workflow Actions [See an example](#)

You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited". [Change Evaluation Criteria](#)

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.