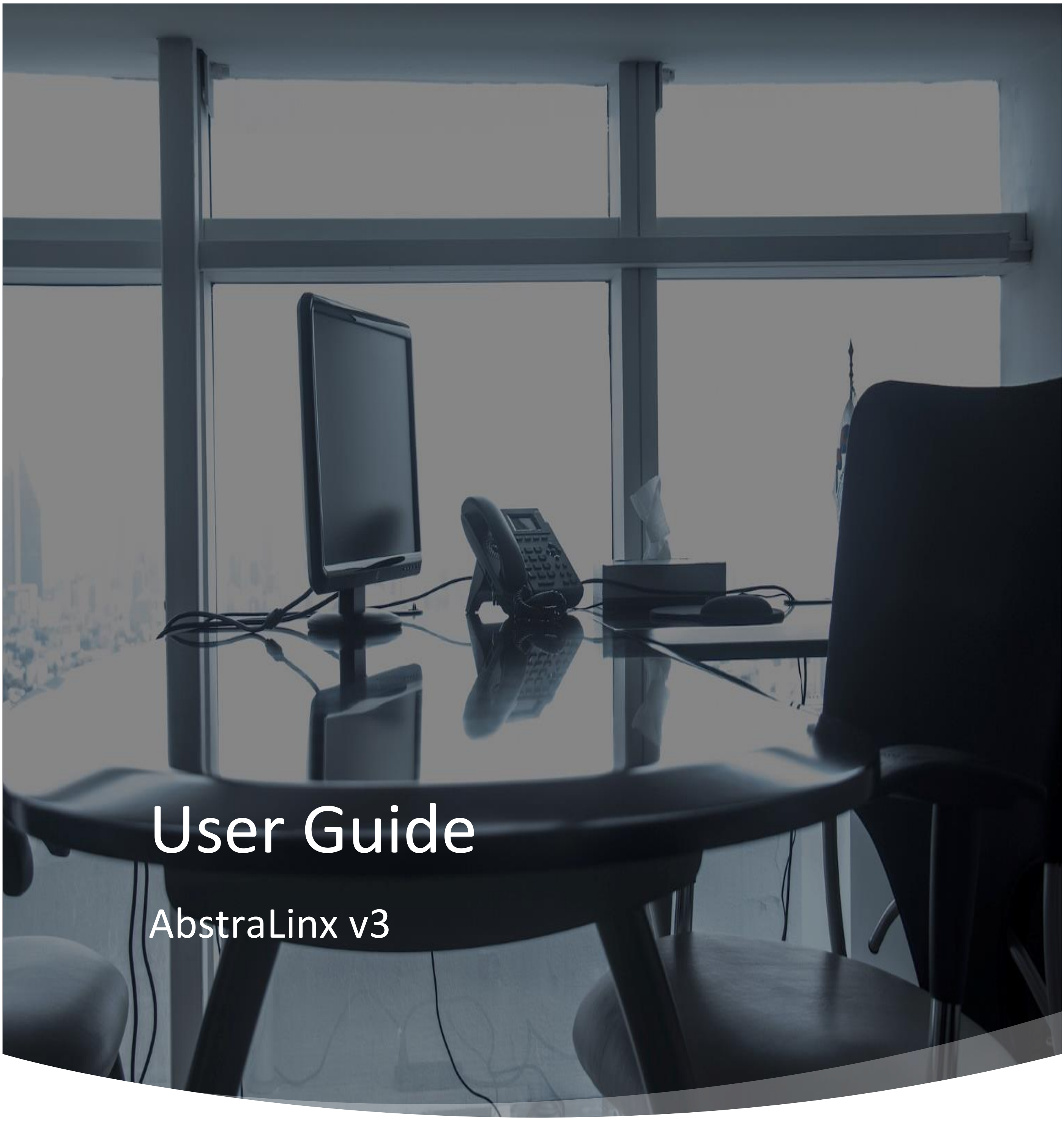


User Guide

AbstraLinx v3

SOFTWARE VERSION 3

BY SOFTBUILDER

AbstraLinx

Leading Metadata Management Solution

Contents

Overview

About AbstraLinx

AbstraLinx is a powerful tool to explore and understand your customized Salesforce system. The tool allows the visualization of the data model for your Salesforce.

AbstraLinx is used to:

- Visualize the ER diagram of a salesforce instance including customized tables and relationships
- Discover Salesforce metadata for your Metadata Management, master data management and data governance projects
- Easily generate and share documentation for the Salesforce data model
- Compare and find differences between two instance of Salesforce

Visit our website for more details:

https://soft-builder.com/erbuilder-for-salesforce/

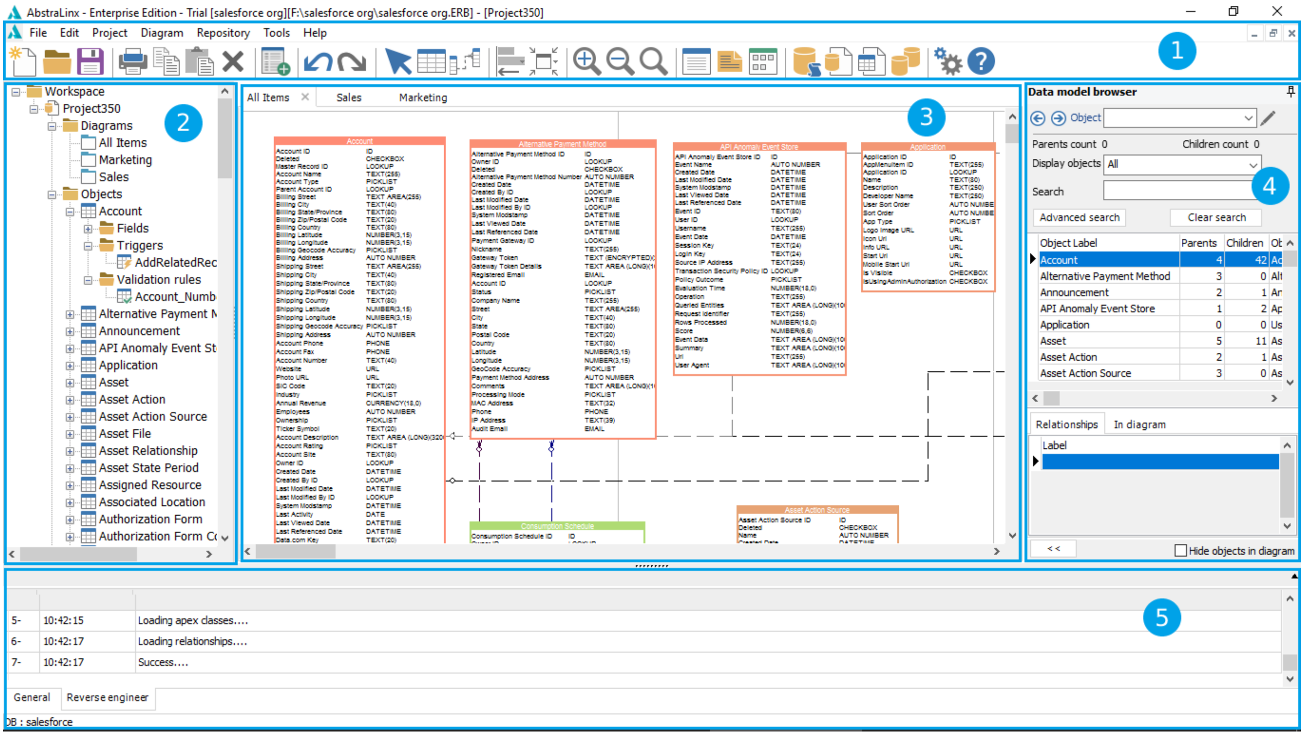
AbstraLinx

Leading Metadata Managment Solution

User interface

AbstraLinx has a simple and user-friendly interface; it consists of five main elements:

1. A toolbar on the top of the main window and contains various buttons to perform some tasks. The toolbar is divided into different sections according to the type of action performed by the button
2. Treeview explorer that enables navigation on the project's objects
3. Diagram area is the drawing area that displays the elements of the designed model
4. Data model browser is an exploration module build for a full and deep exploration of the data structure extracted from Salesforce
5. The status bar displays alerts, errors, and information about the different actions executed


AbstraLinx - Enterprise Edition - Trial [salesforce org][F:\salesforce org\salesforce org.ERB] - [Project350]
File Edit Project Diagram Repository Tools Help
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In diagram
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10:42:15 Loading apex classes....
10:42:17 Loading relationships....
10:42:17 Success....
General
Reverse engineer
DB : salesforce

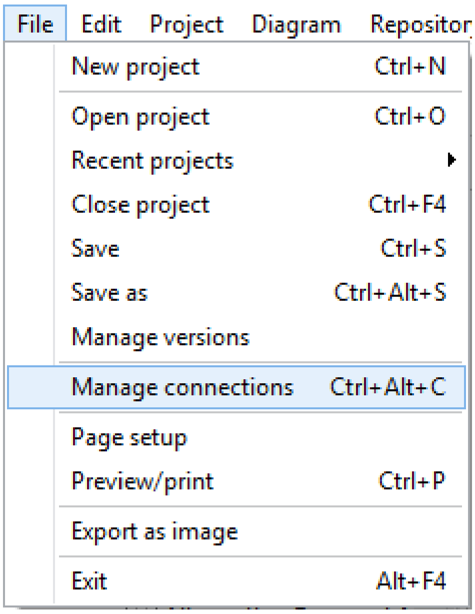
Connections management

AbstraLinx allows you to create multiple connections to different Salesforce organizations.

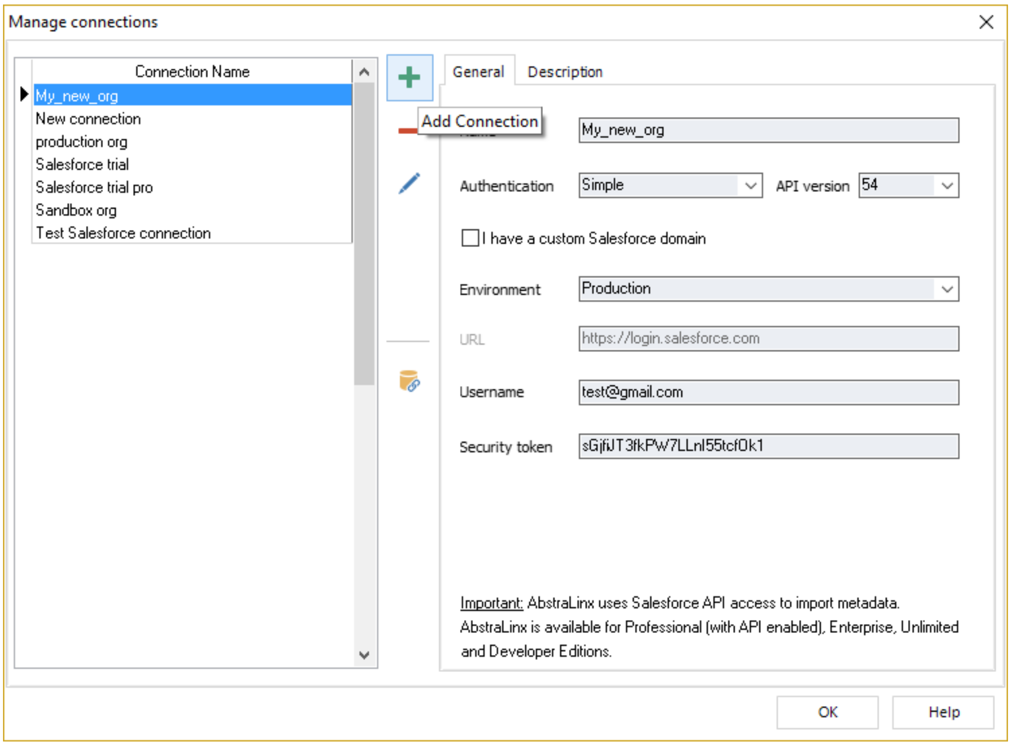
Creating a new connection

To create a new connection to Salesforce:

1. Select "**File | Manage connections**".



2. Then, click "" in the "**Manage connections**" form and fill in the required fields.



3. Choose one of the two-authentication method: Simple or Connected app method.

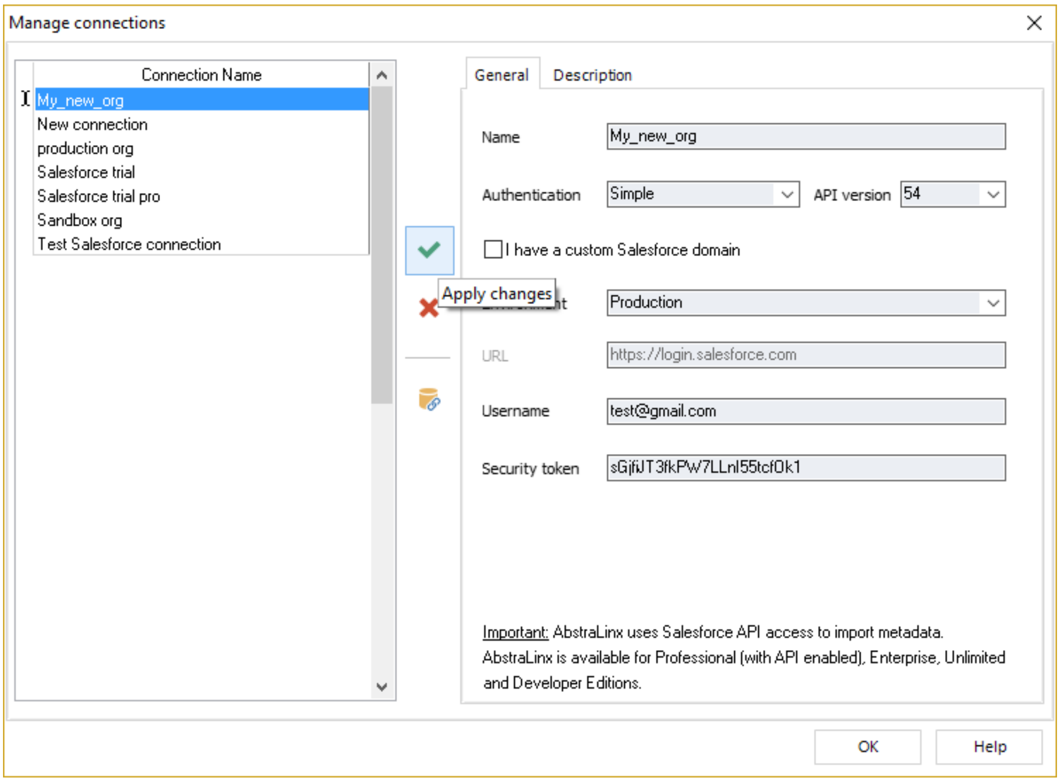
Simple method

If you choose to use the simple authentication method, you have to fill in the following information:

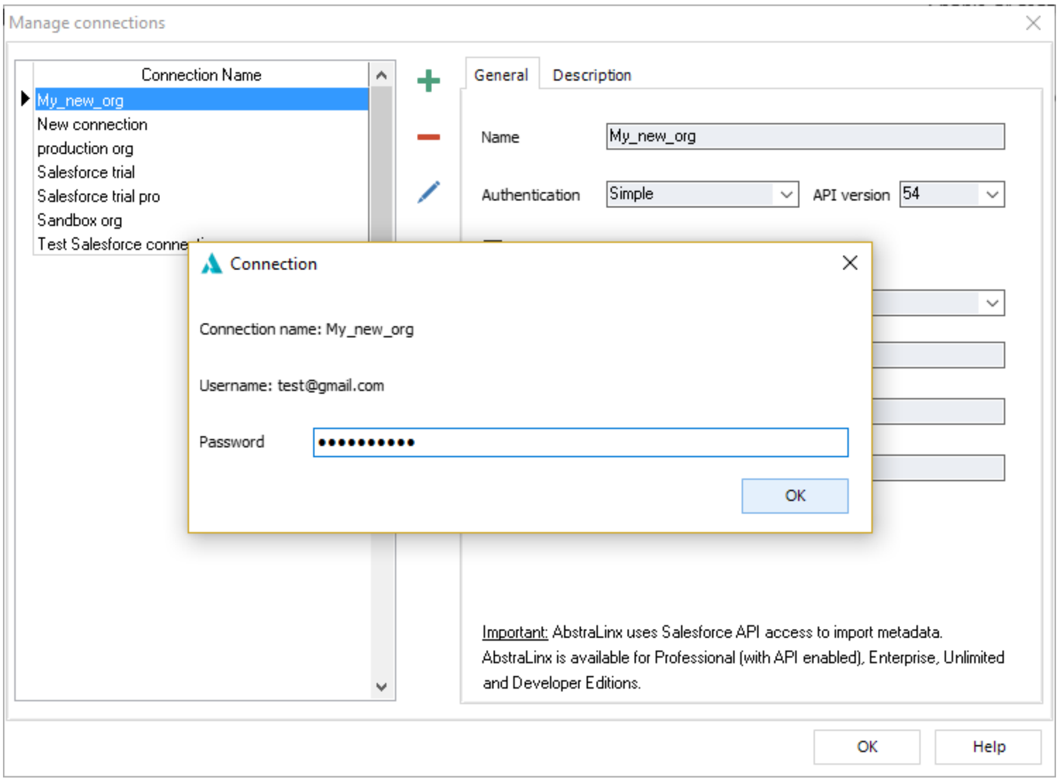
- Name: Name of the connection.
- Version API: Select the version of Salesforce API.
- Authentication: Select simple authentication method
- Environment: Choose which type of environments you want to connect (Production or Sandbox).
- URL: The URL is filled in automatically according to the chosen environment. **"Https://login.salesforce.com"** for production, and **"Https://test.salesforce.com"** for Sandbox environment.

  If you are using a custom domain in your organization, you have to check "I have a Salesforce custom domain", the URL will be changed to "**Https://yourcustomdomain.my.salesforce.com"**. Replace **"Yourcustomdomain"** with your custom domain name.
- Username: fill in your user name.
- Security token: fill in your security token. To get your security token login to your organization and navigate to the top navigation bar and go to **your name > Settings > My Personal information > Reset My Security Token**. Click on **"Reset Security Token"**. Clicking the button invalidates your existing token. After resetting your token, it will be sent to the user email.

Then Click on "" to complete this process.



To test your new connection click on: then enter your password in the window that opens.



Available in: Standard, Professional and Enterprise Editions

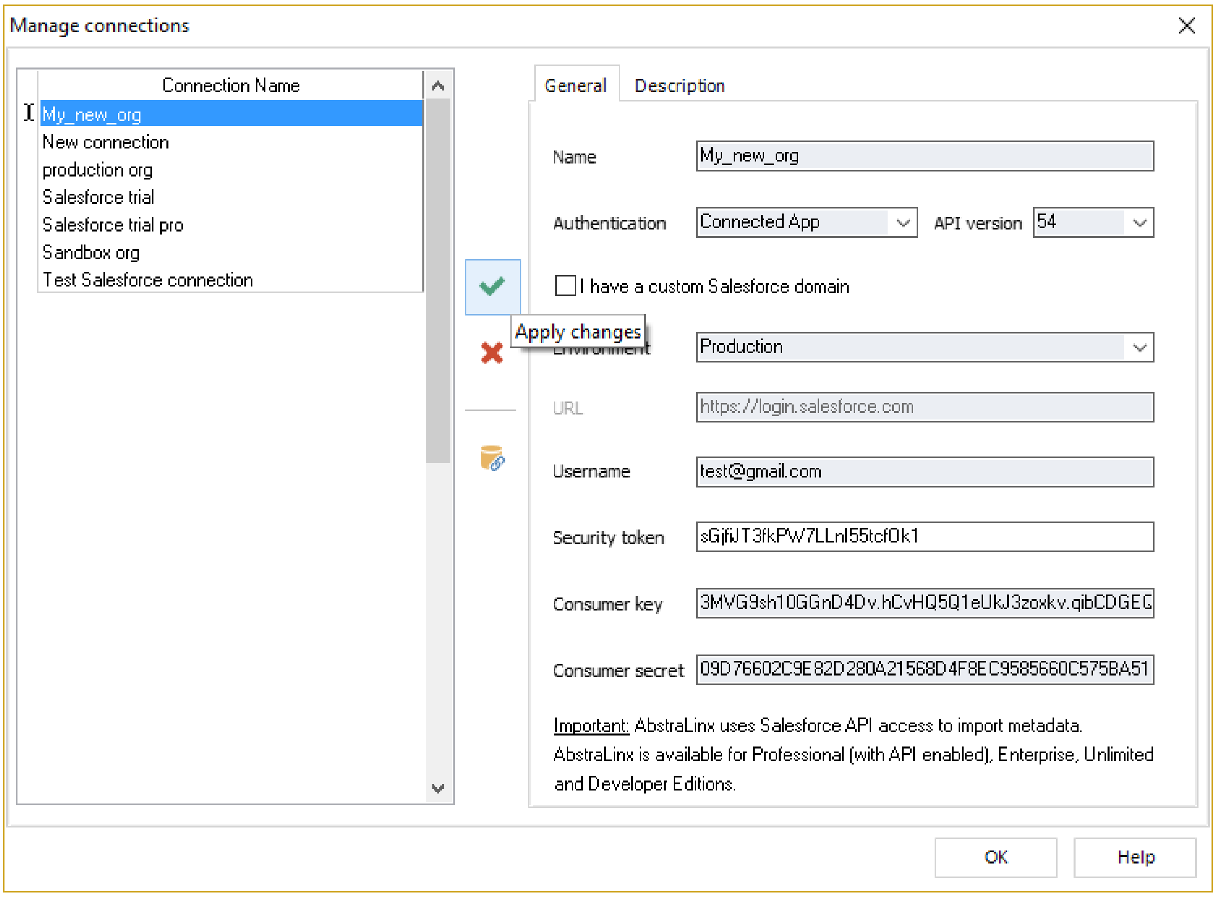
Connected app method

Before creating a new connection using this method, you must have a connected app configured on your org to allow the tool to access and extract your metadata. If you do not have it, start creating a Salesforce connected app by following this step-by-step guideline.

With this method, you have to fill in the consumer key and the consumer secret in addition to the information filled in with the simple method.

- Name: Name of the connection
- Version API: Select the version of Salesforce API
- Authentication: Select connected app authentication method
- Environment: Choose which type of environments you want to connect(Production or Sandbox)
- URL: The URL is filled in automatically according to the chosen environment. If you are using a custom domain in your organization, you have to check **“I have a Salesforce custom domain”** checkbox; the URL will be changed to **“Https://yourcustomdomain.my.salesforce.com”,** Replace **“Yourcustomdomain”** with the name of your custom domain
- Username: fill in your user name
- Security token: fill in your security token. To get your security token login to your organization and navigate to the top navigation bar and go to **<your name > Settings > My Personal information > Reset My Security Token**. Click on "**Reset Security Token**". Clicking the button invalidates your existing token. After resetting your token, it will be sent to the user email
- Consumer key: your Consumer key from the connected app (Read this step-by-step guideline)
- Consumer secret: your Consumer Secret from the connected app (Read this step-by-step guideline)

Click on “ ” then enter your password in the window that opens to complete this process.

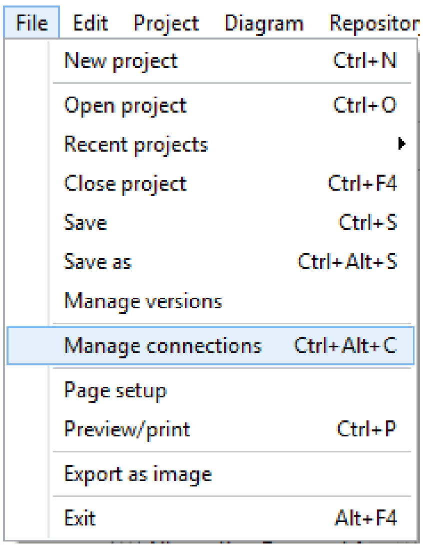


Available in: Standard, Professional and Enterprise Editions

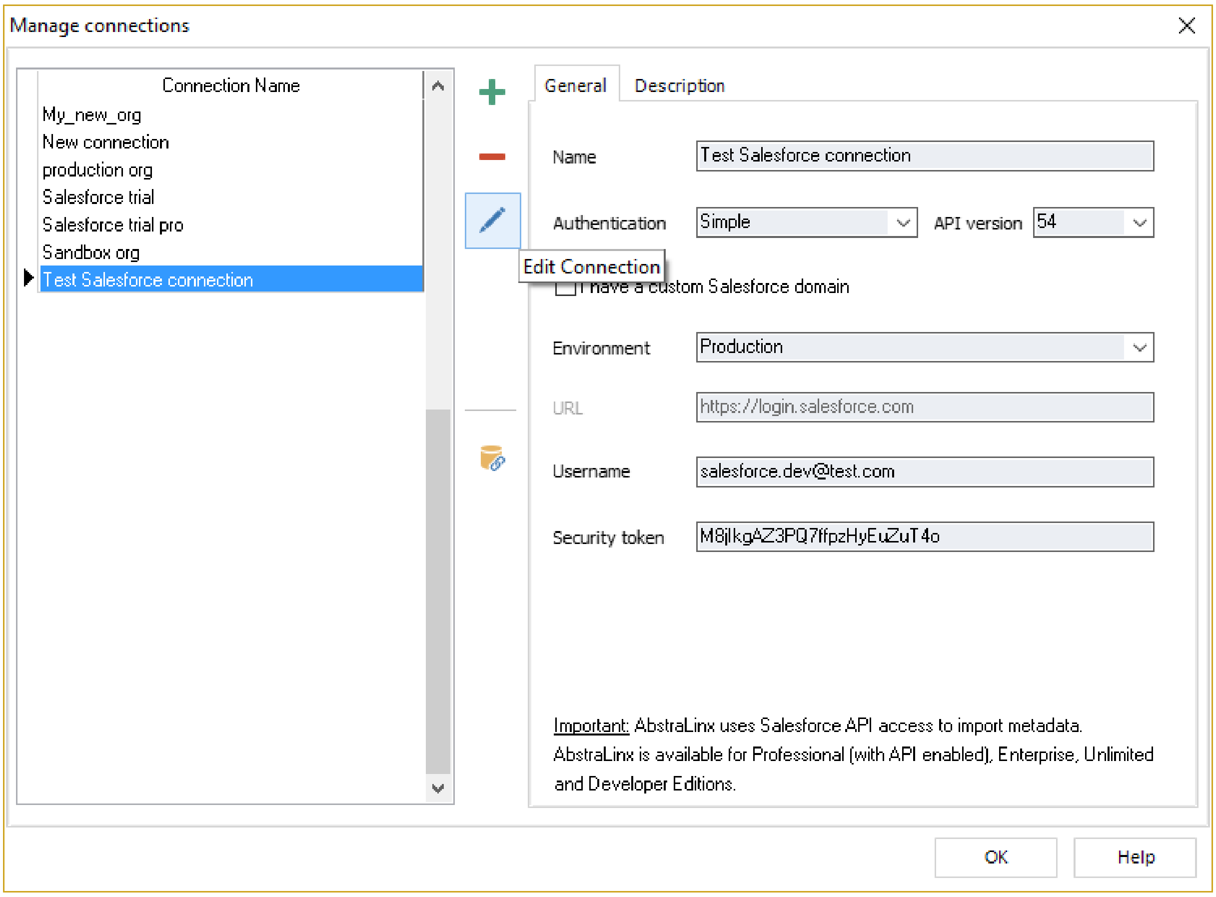
Editing an existing connection

To modify the properties of an existing connection:

1. Select **"File | Manage connections"**:



2. Select the connection you want to edit, and click on "" in the **"Manage Connections"** form:



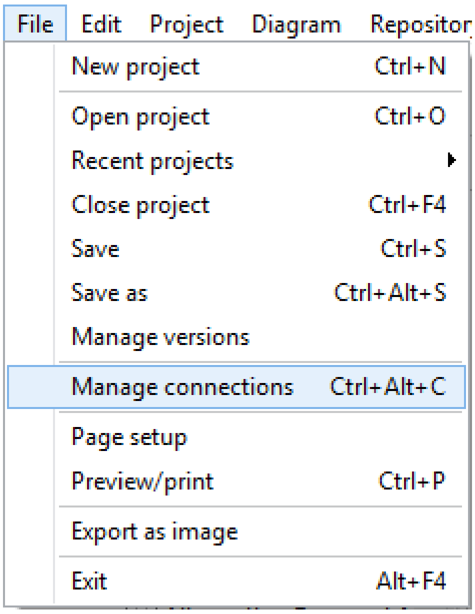
3. Change the necessary properties of the connection, and finally, click on "" to apply the changes.

Available in: Standard, Professional and Enterprise Editions

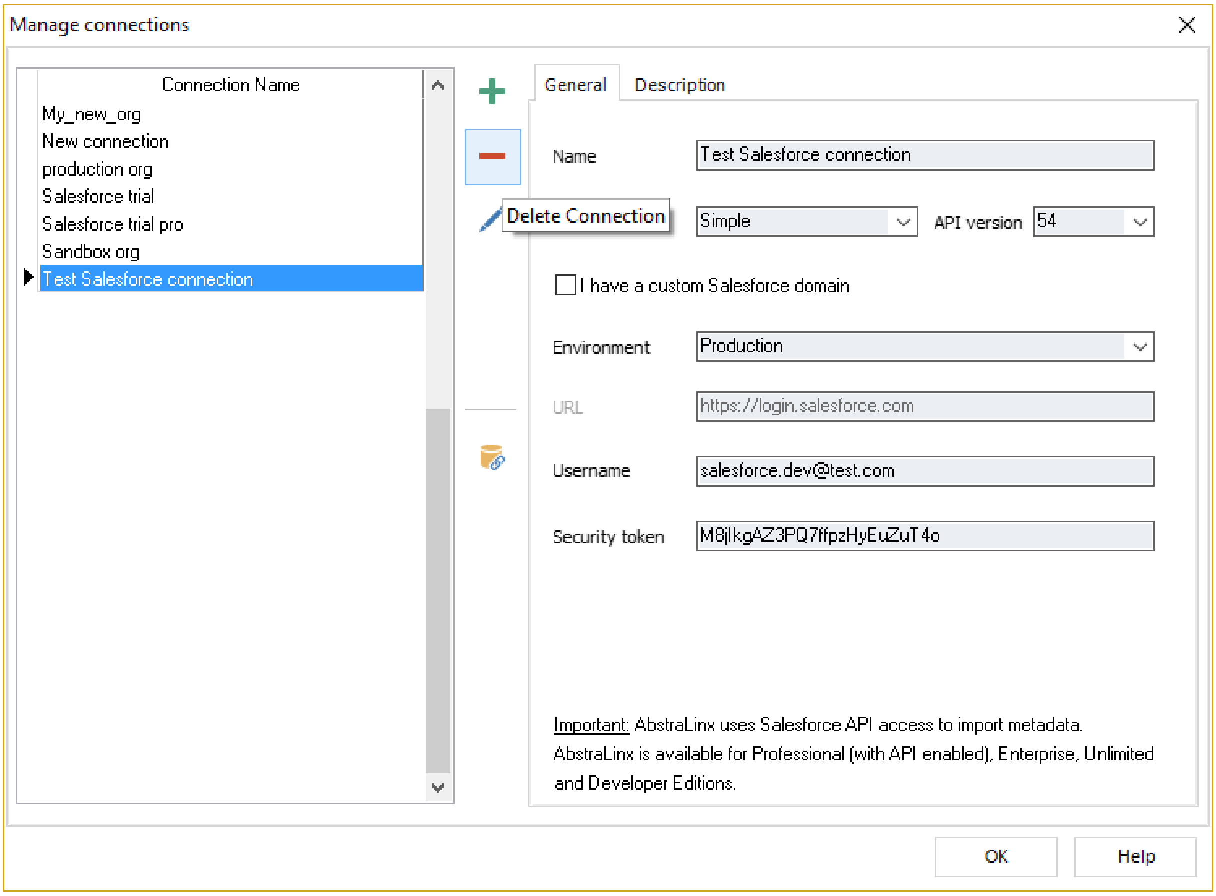
Deleting an existing connection

To delete an existing connection:

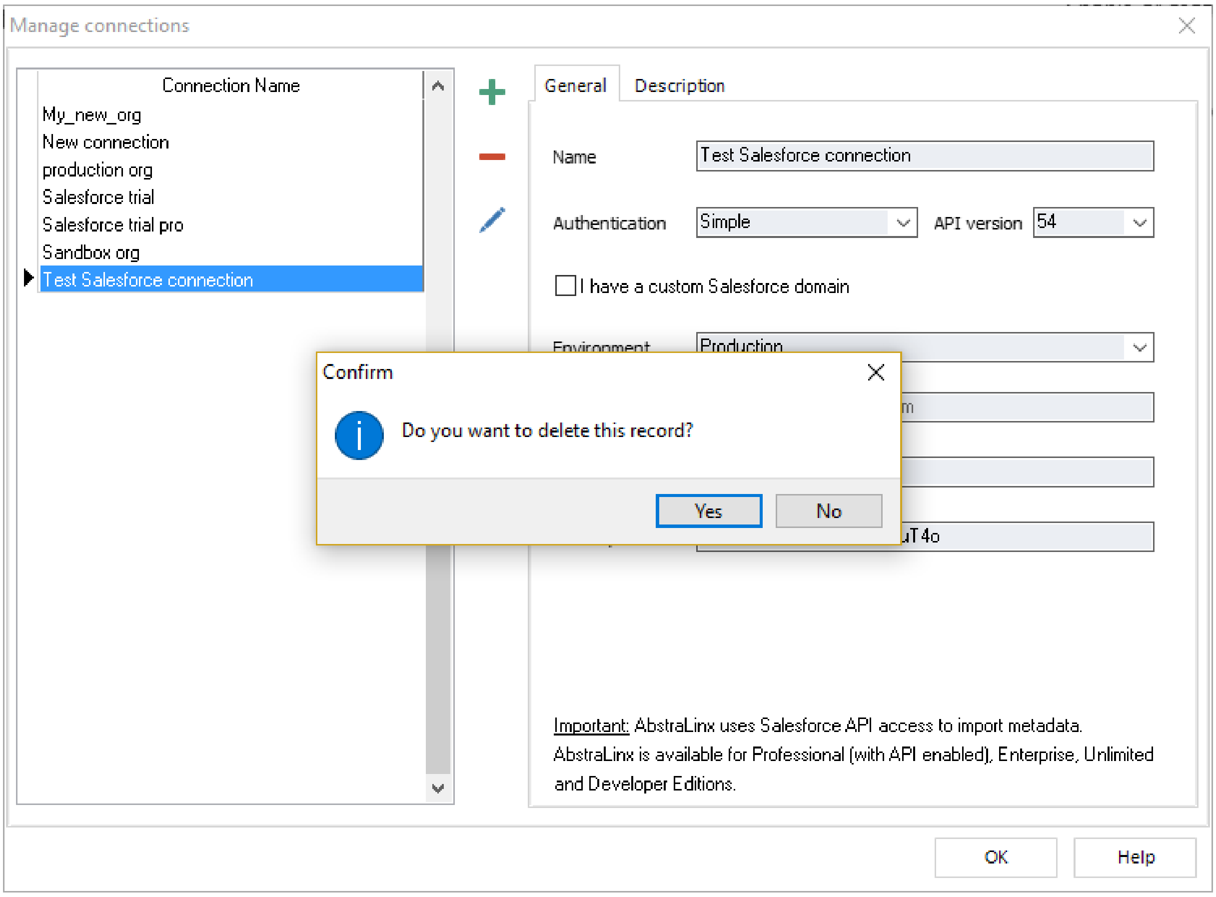
1. Select **"File | Manage connections"**:



2. Select the connection you want to delete then click on “ ”:



3. To complete the deletion, click **“Yes”** in the dialog box.



Available in: Standard, Professional and Enterprise Editions

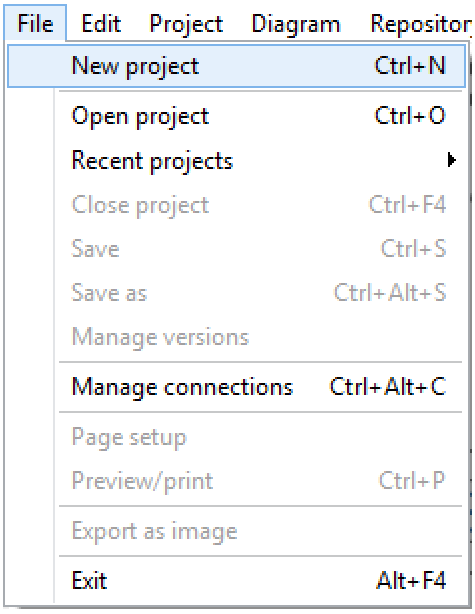
Project Management

Creating a new project

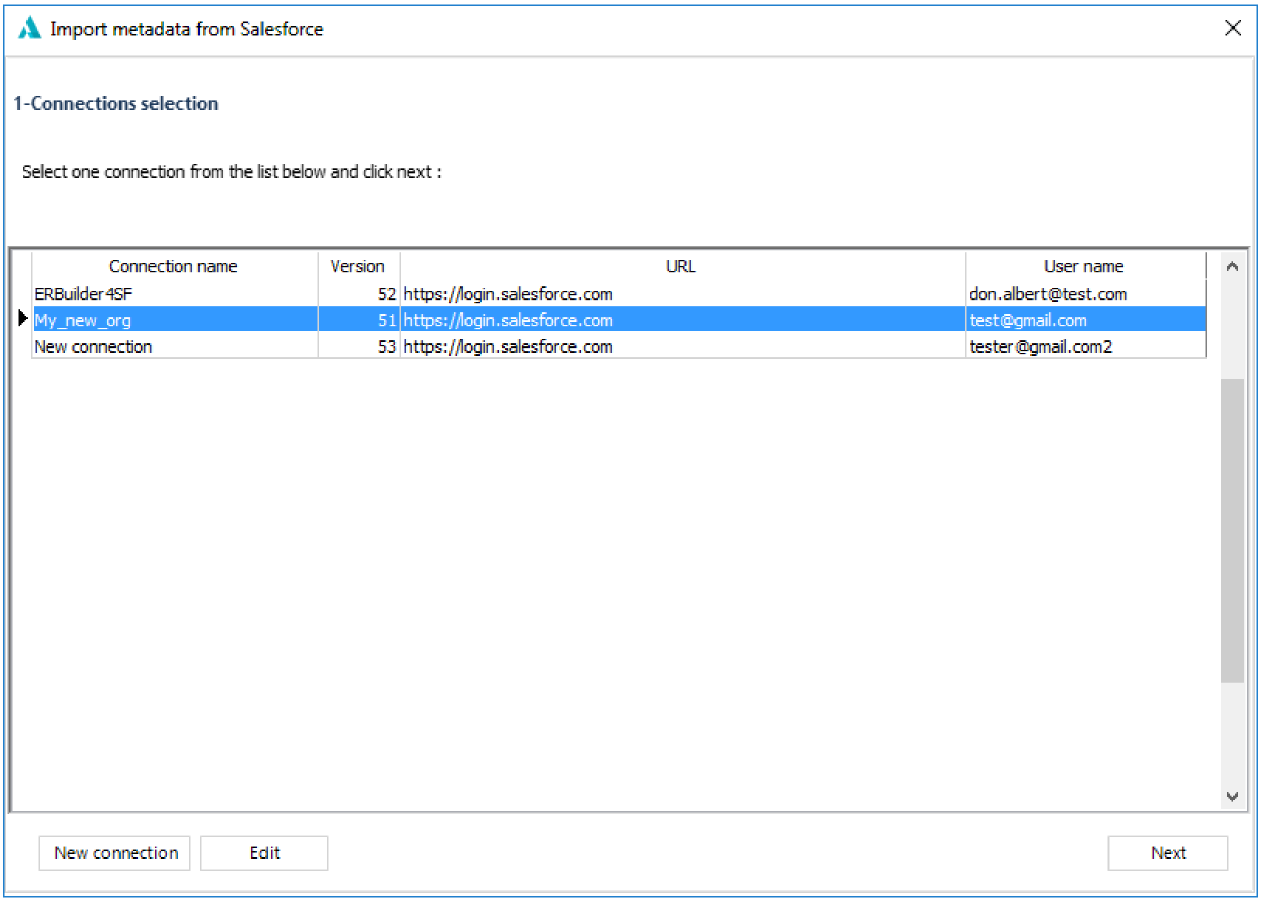
AbstraLinx allows you to reverse engineer a Salesforce organization to visualize Salesforce objects as a data model diagram.

To create a new project:

1. Select **“File | New Project”** from the main menu:

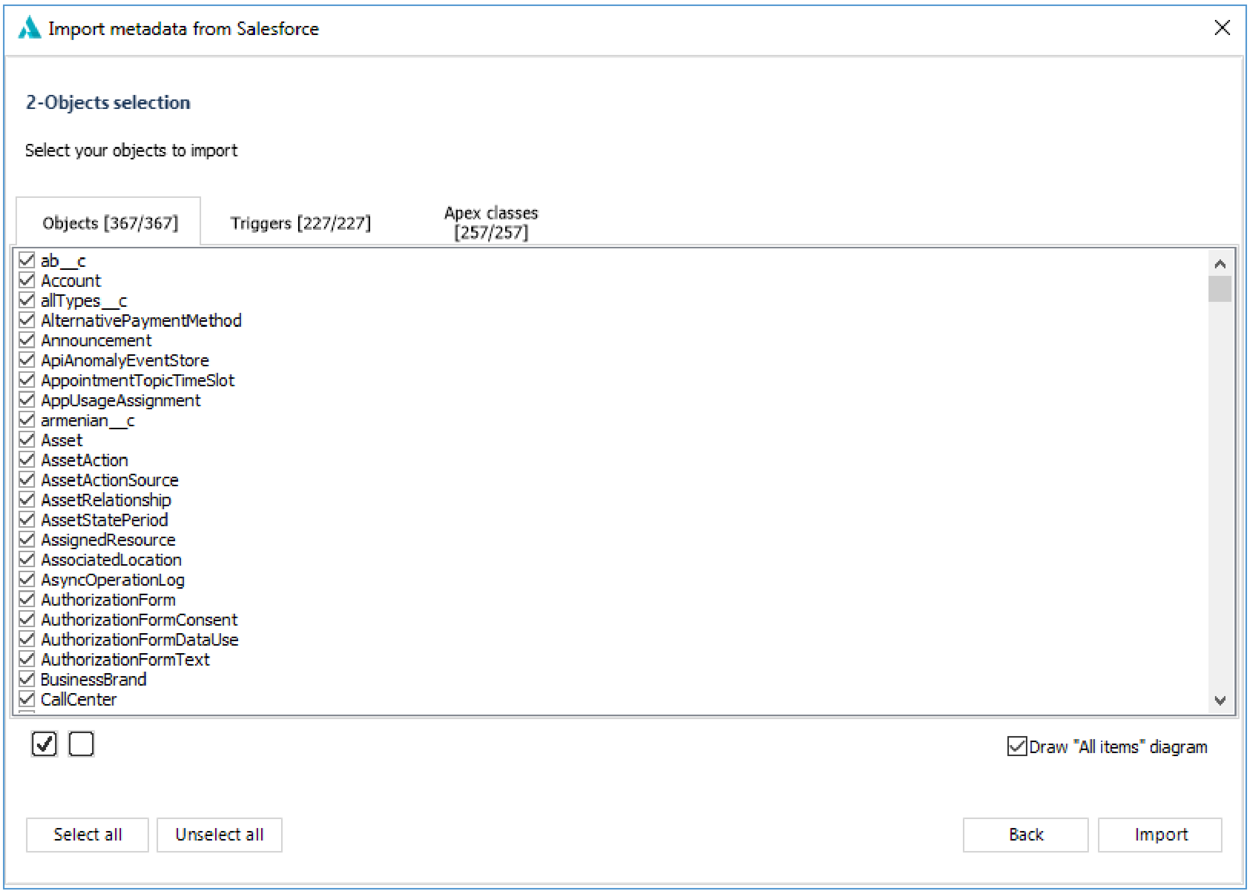


2. In the **"New Project"** dialog box, select a connection to the Salesforce org then click on **"Next".** You can also create a new connection by clicking the **"New Connection"** button (see the section Connections Management).

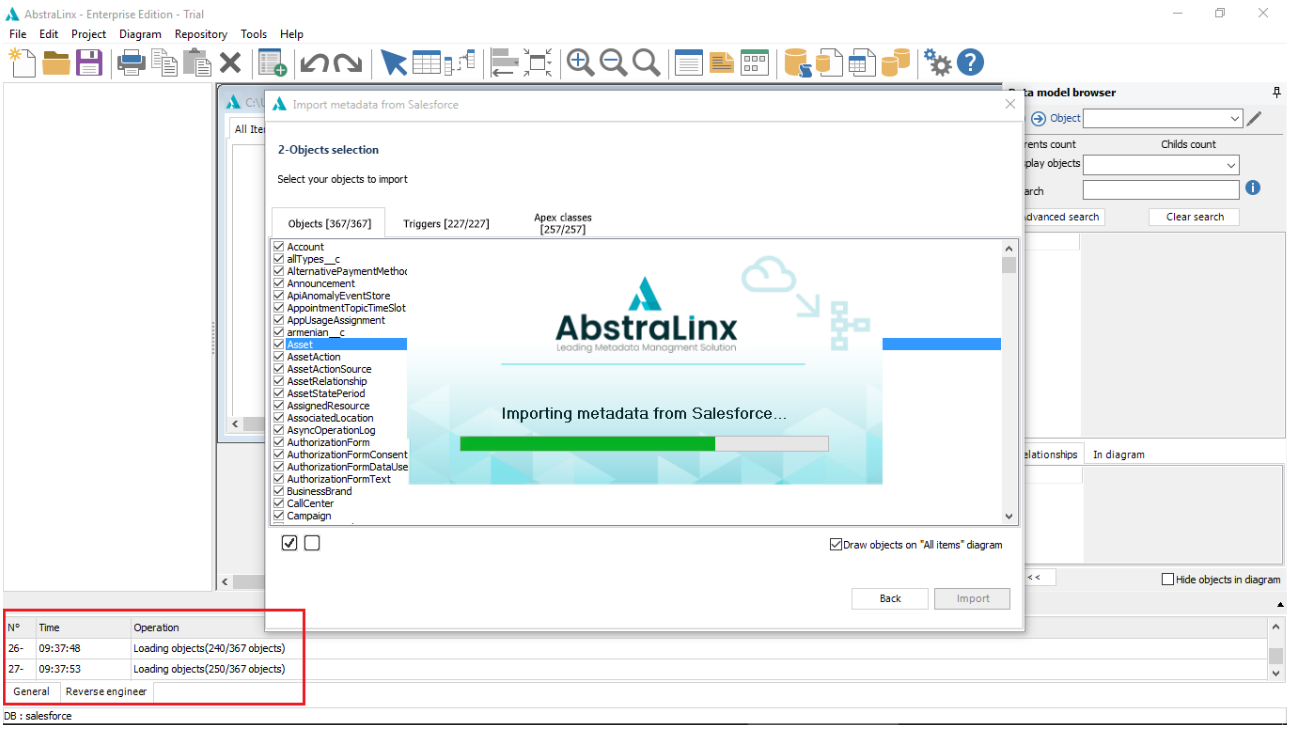


3. In the next step, select the objects, triggers and the apex classes to be imported, and then click on **"Import"**.

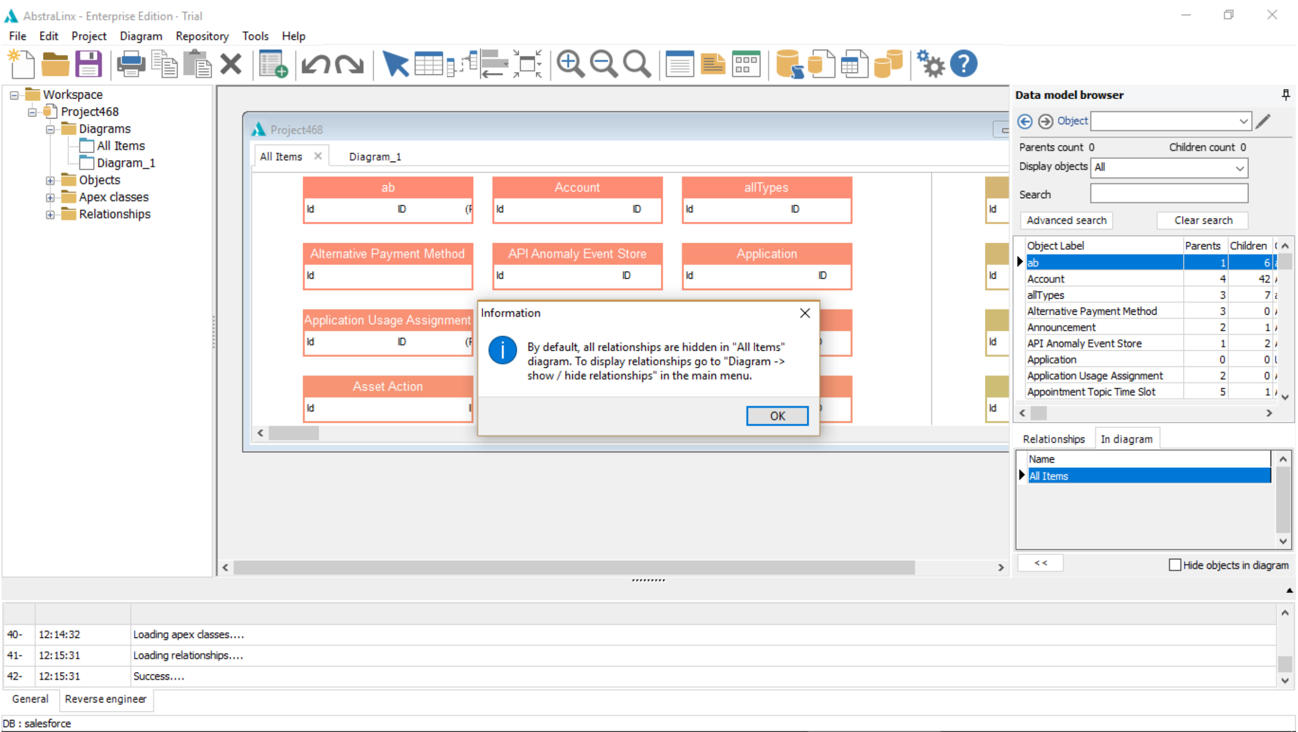
With the option **"Draw All Items Diagram"**, you can choose to draw the diagram **"all items"** after reverse engineering the Salesforce org or get only the list of the objects selected above without the diagram. By default, this option is checked.



In the console below, the process will display a notification regarding the success or failure of the import operation.



4. Objects and relationships are positioned on the diagram. By default, all relationships are hidden in **"All items"** diagram. To display relationships go to **"Diagram | Show/ hide Relationships"** from the main menu.



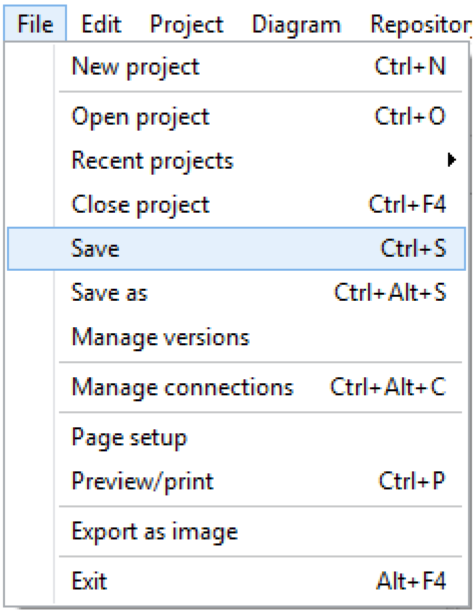
Available in: Standard, Professional and Enterprise Editions

Saving a project

To save a project:

1. Select **“File | Save”** on the menu bar.

2. You can also save it with a shortcut (Ctrl+S):

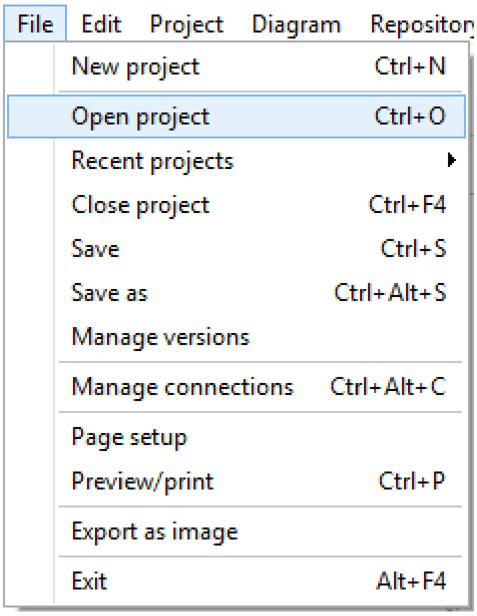


Available in: Standard, Professional and Enterprise Editions

Opening an existing project

To open an existing project:

1. Select **“File | Open project”**:



2. In the **"File Open"** dialog box, select a project and click on **"Open"**. The file extension should be ".ABLX" or ".ERB" for the older projects.

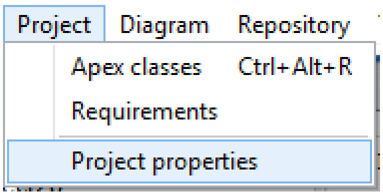
The last opened projects are accessible from the **"File | Recent projects"** menu.

Available in: Standard, Professional and Enterprise Editions

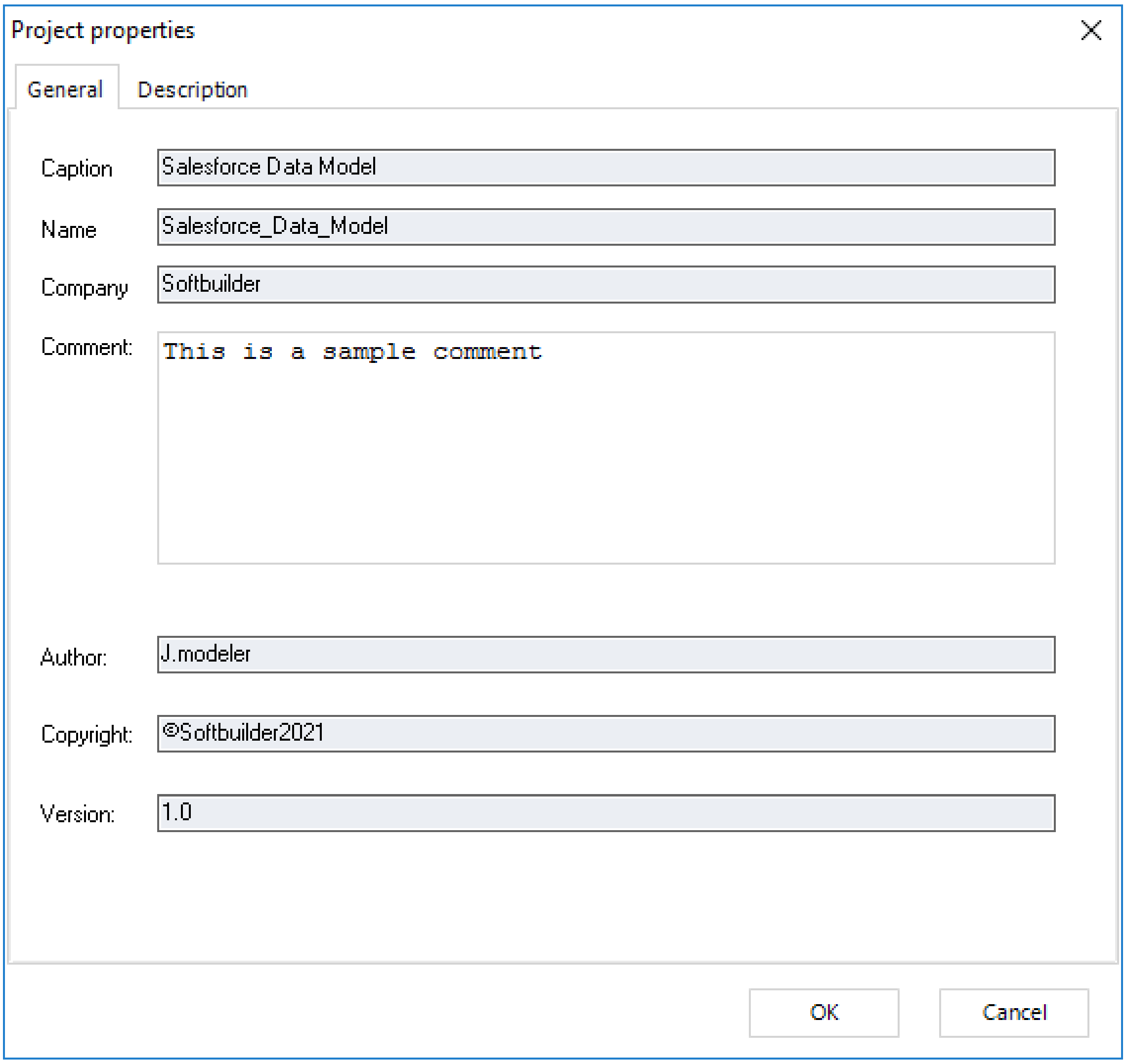
Project properties

To display project properties:

1. Select **"Project | Project properties".**



2. A window containing two tabs will appear: General and Description. You can enter your project properties and click on OK to confirm.



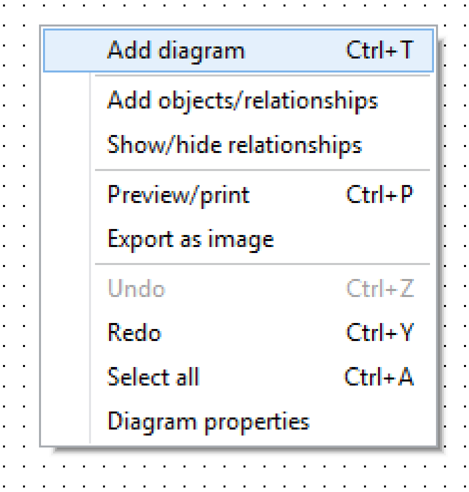
Available in: Standard, Professional and Enterprise Editions

Diagram Management

Add a new diagram

To add a diagram:

1. Right-click on the diagram.
2. Click on **"Add Diagram"**. A new tab is added with the name "Diagram_ number of the diagram".



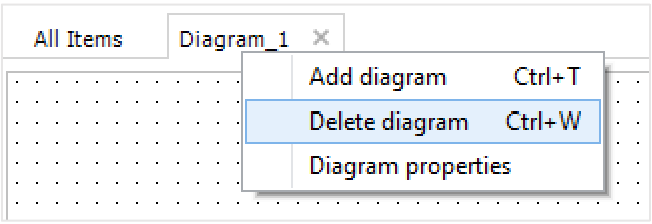
You can also add it with a shortcut (Ctrl+T).

Available in: Standard, Professional and Enterprise Editions

Delete a diagram

To delete a diagram:

1. Right-click on the created diagram.
2. Click on **"Delete Diagram"**:



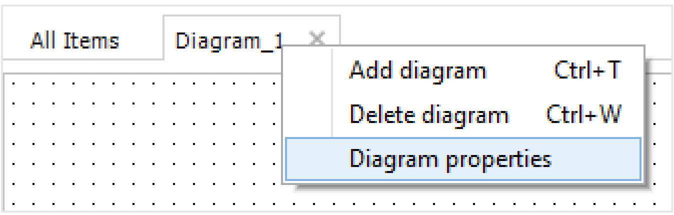
You can also delete it with a shortcut (Ctrl+W).

Available in: Standard, Professional and Enterprise Editions

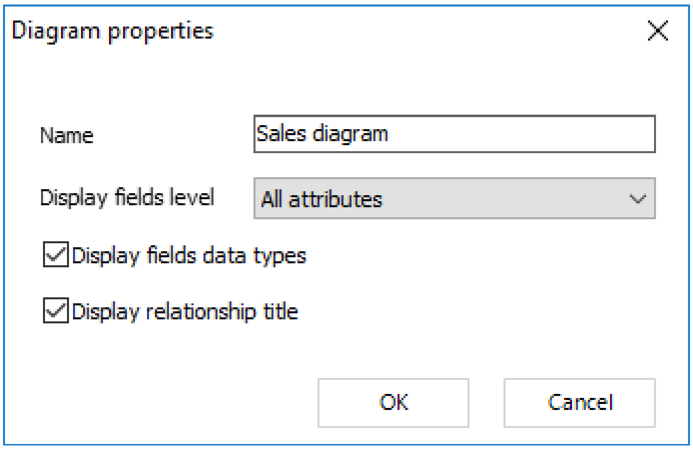
Rename a diagram

To rename a diagram:

1. Right-click on the created diagram.
2. Click **"Diagram properties"**:



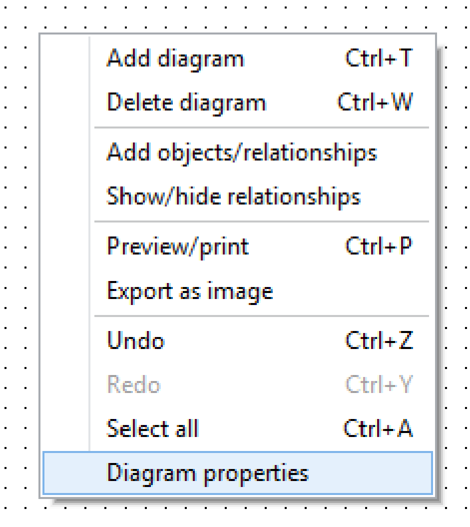
3. On the diagram properties window enter the new name then click on OK.



Available in: Standard, Professional and Enterprise Editions

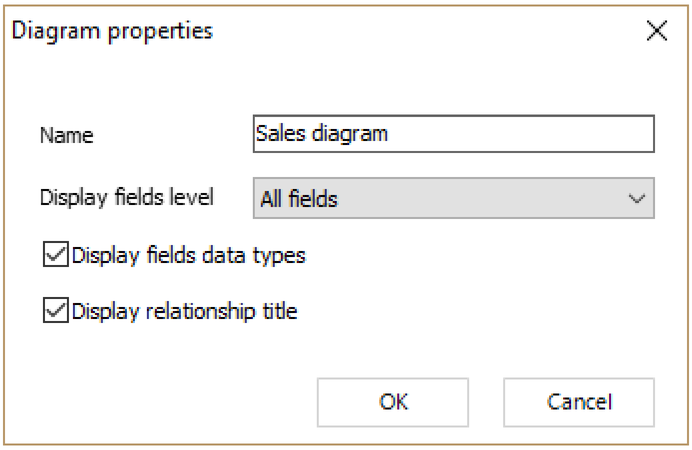
Diagram properties

To display the diagram properties window, right-click on the diagram name or right-click from the diagram drawing area.

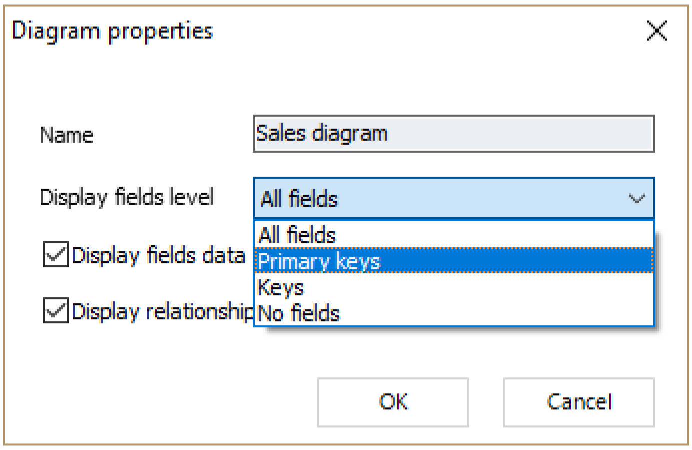


From the diagram properties, you can set the following options:

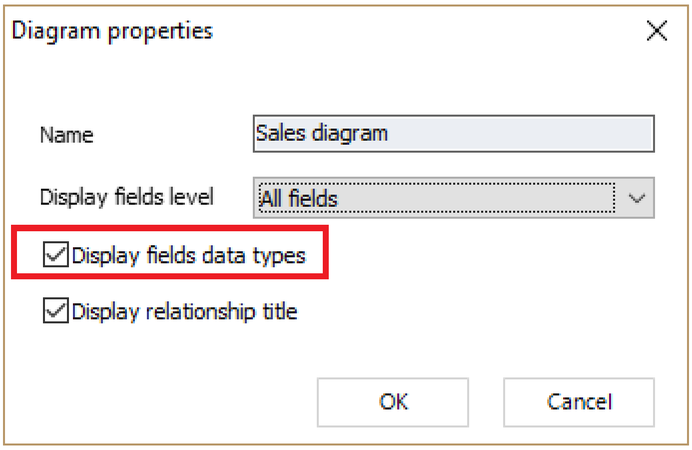
1. Rename the diagram



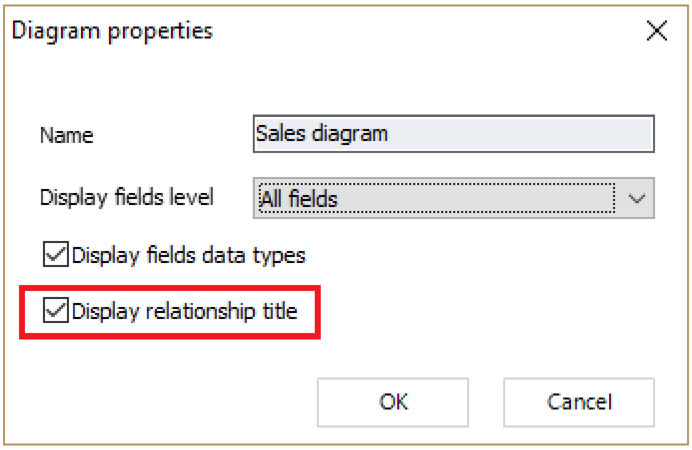
2. Display fields level: define which fields will be displayed on the objects on the diagram. You can choose between displaying all attributes, primary keys, keys or no attributes.



3. Display fields data types: display or hide field data types on the objects in the diagram.



4. Display relationships title: display/hide relationships titles from the diagram.

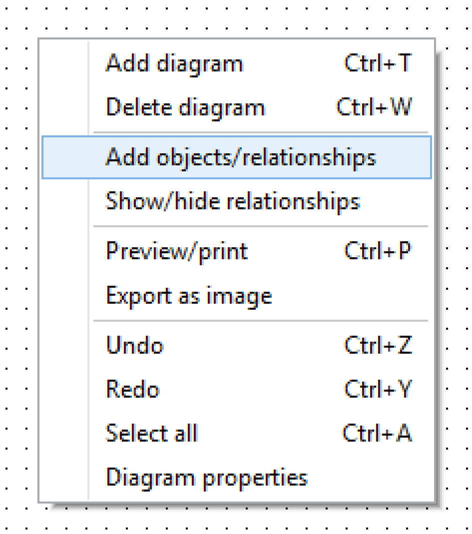


Available in: Standard, Professional and Enterprise Editions

Add existing objects/relationships to a diagram

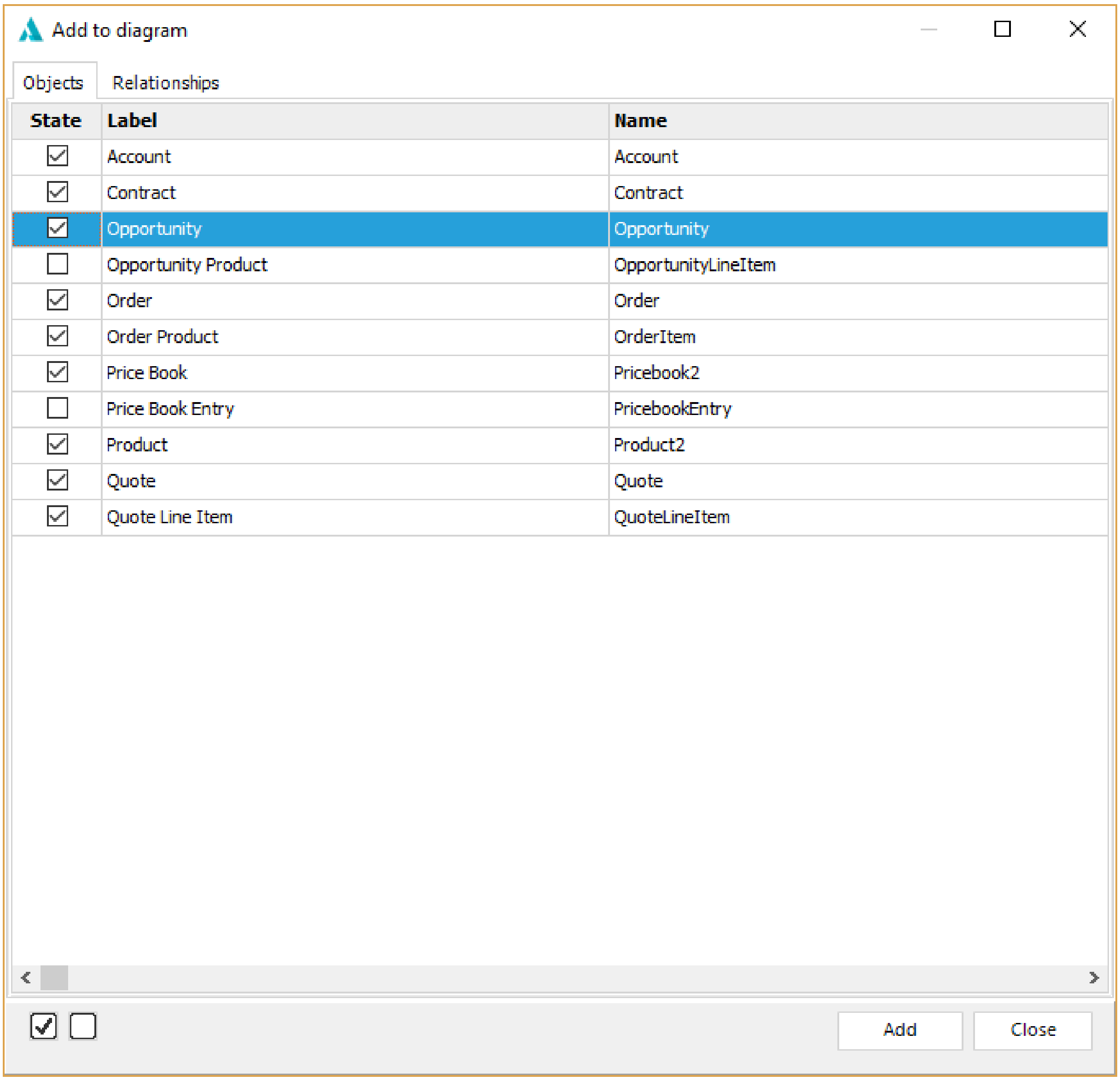
You can add existing objects or relationships from the other diagrams of the same project to a new diagram by using the **“Add objects/Relationships**” utility.
To add objects/relationships:

1. Right-click on the diagram area of the new diagram and click on **“Add objects/relationships”.**



Otherwise, you can use the **“Add objects/relationships”** icon from the toolbox 

2. On the displayed **“Add to diagram window”** select the objects/relationships you want to add to your new diagram, and then click **“Add”.**

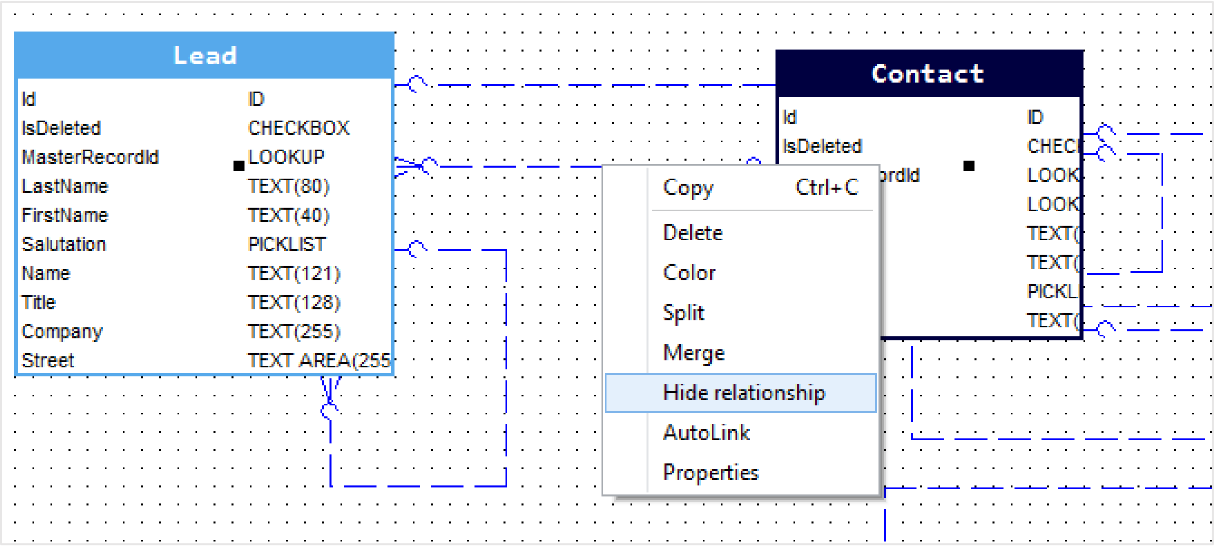


Available in: Standard, Professional and Enterprise Editions

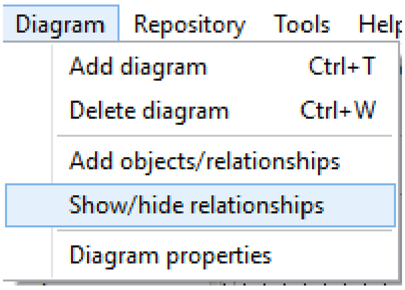
Show/hide relationships from a diagram

The show/hide relationships utility allows you to show/hide a specific or all relationships from the diagram.

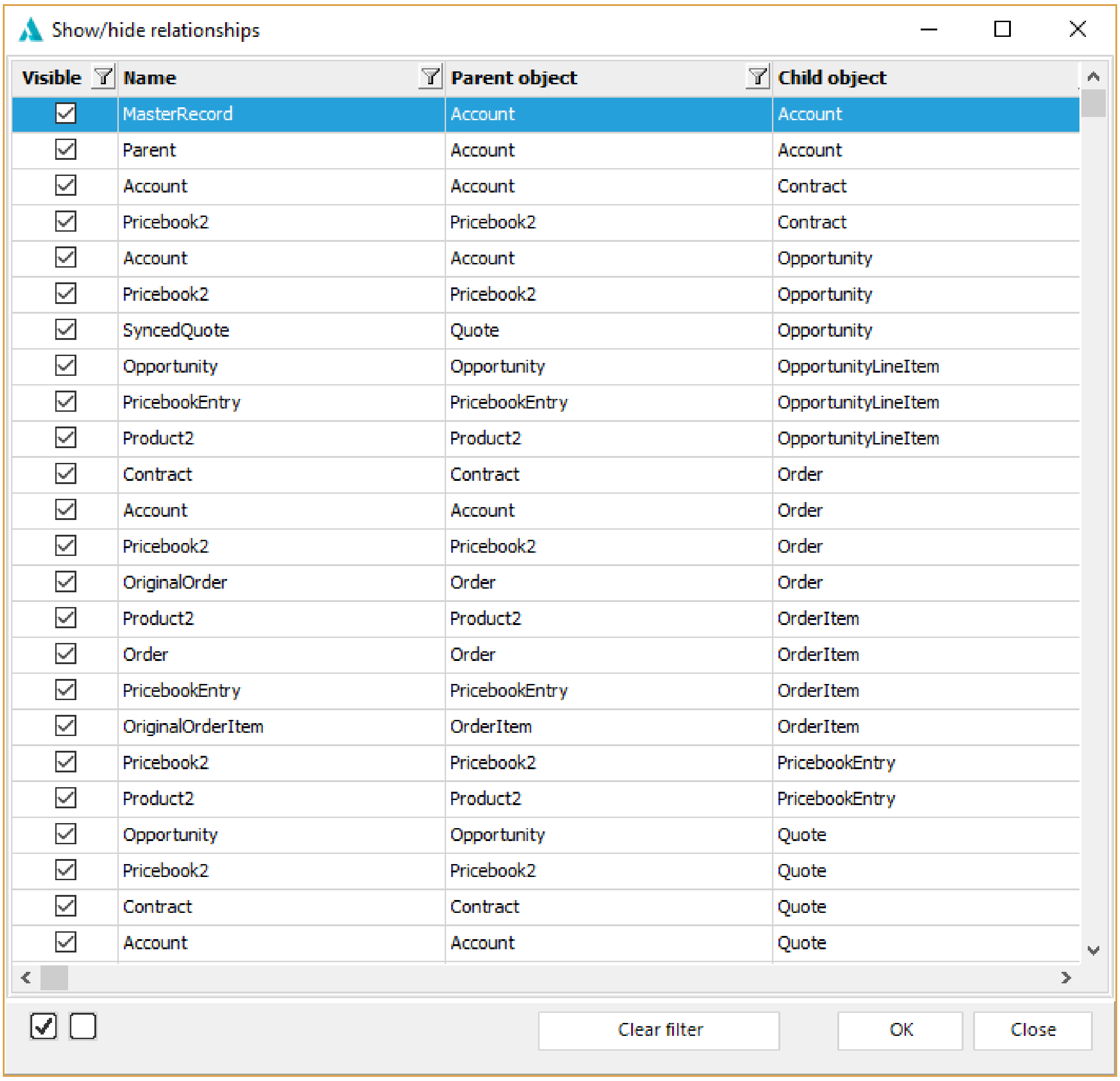
1. To hide a specific relationship, right click on its graphical representation then click on **"Hide Relationship"**.



2. To hide all relationships, go to the menu "**Diagram**" then click "**Show/hide Relationships**", or just do a right click on the diagram area, then select "**Show/hide Relationships**".



3. In the opened window, unselect all relationships to hide them then click "**OK**"

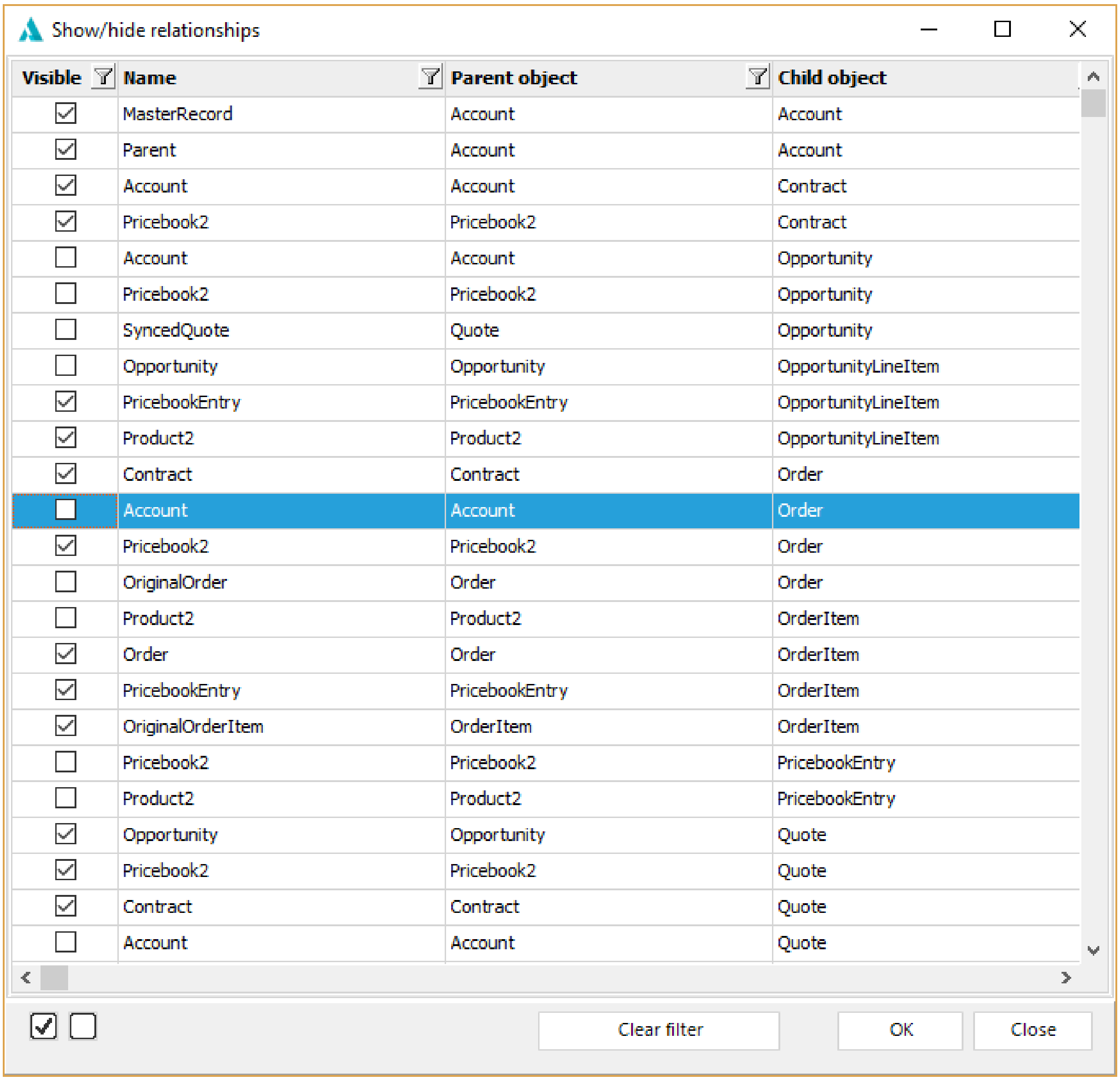


Show/hide relationships

Visible	Name	Parent object	Child object
☑	MasterRecord	Account	Account
☑	Parent	Account	Account
☑	Account	Account	Contract
☑	Pricebook2	Pricebook2	Contract
☑	Account	Account	Opportunity
☑	Pricebook2	Pricebook2	Opportunity
☑	SyncedQuote	Quote	Opportunity
☑	Opportunity	Opportunity	OpportunityLineItem
☑	PricebookEntry	PricebookEntry	OpportunityLineItem
☑	Product2	Product2	OpportunityLineItem
☑	Contract	Contract	Order
☑	Account	Account	Order
☑	Pricebook2	Pricebook2	Order
☑	OriginalOrder	Order	Order
☑	Product2	Product2	OrderItem
☑	Order	Order	OrderItem
☑	PricebookEntry	PricebookEntry	OrderItem
☑	OriginalOrderItem	OrderItem	OrderItem
☑	Pricebook2	Pricebook2	PricebookEntry
☑	Product2	Product2	PricebookEntry
☑	Opportunity	Opportunity	Quote
☑	Pricebook2	Pricebook2	Quote
☑	Contract	Contract	Quote
☑	Account	Account	Quote

Clear filter OK Close

4. To display one or more relationships, go to “**Diagram | Show/hide relationships**” then select the relationships you want to show.

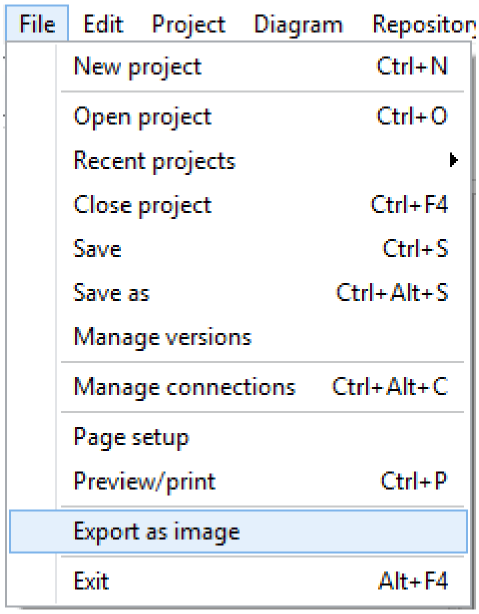


Available in: Standard, Professional and Enterprise Editions

Export diagram as an image

To export a diagram as an image:

1. Select **"File | Export as Image"** from the main menu bar.
2. The Browse window appears. Name the exported image and choose an emplacement to save it then click **"Save"**.

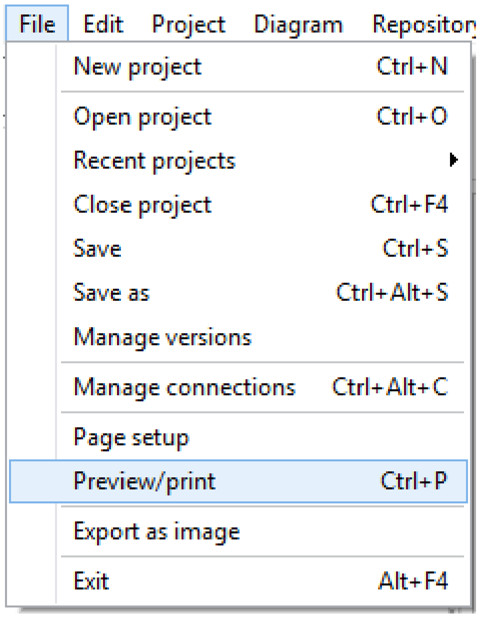


Available in: Standard, Professional and Enterprise Editions

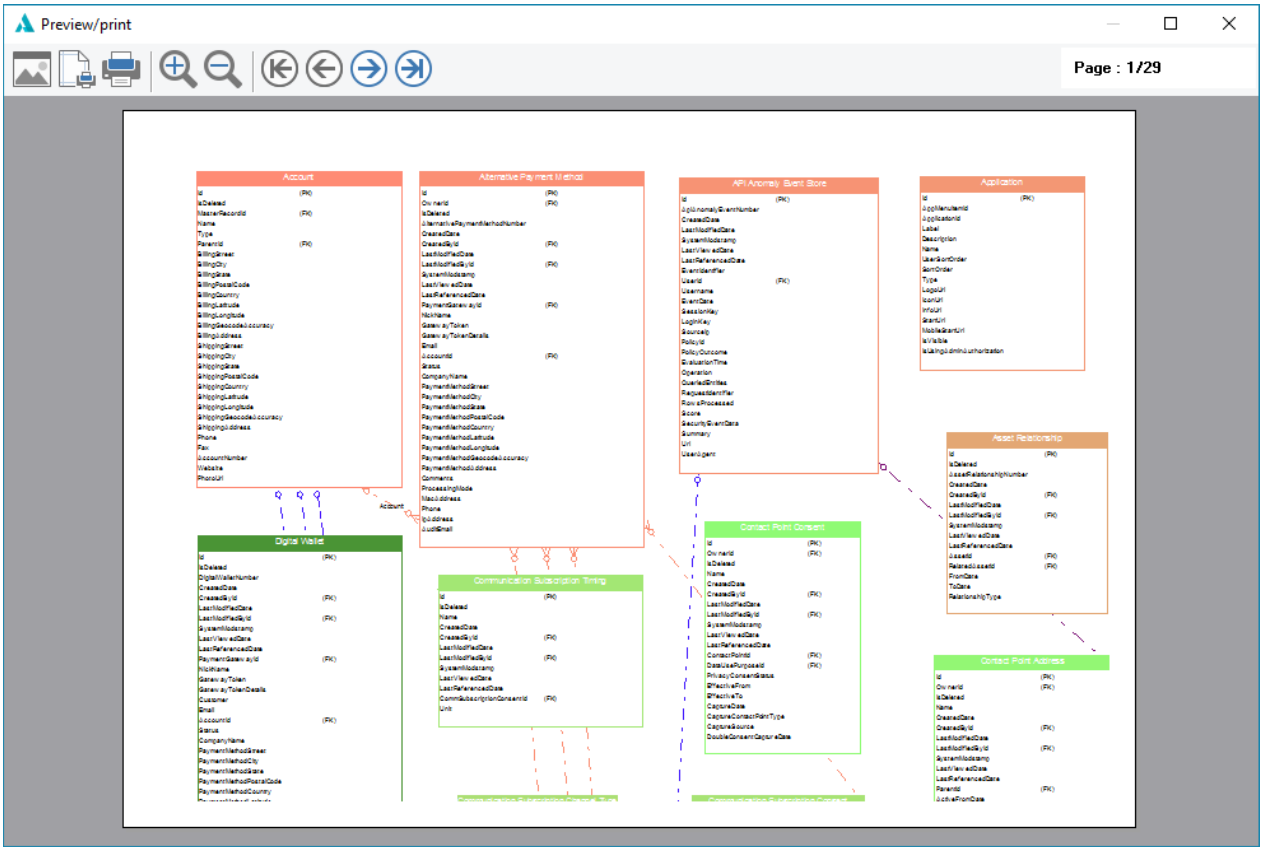
Print/ Preview a diagram

To print or preview a diagram:

1. Click on **"File | Preview/print"** or use a shortcut (Ctrl+P):



2. To start printing your diagram, just click on the "Printer" icon.

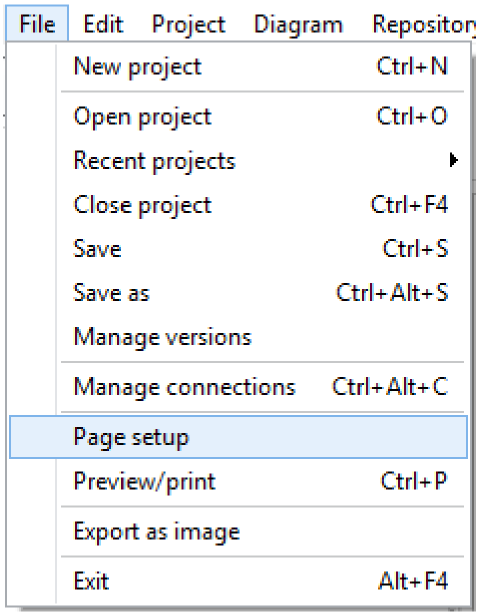


Available in: Standard, Professional and Enterprise Editions

Print setup

In order to adjust how your diagram will be printed:

1. Click on **"File |Page Setup"**



In the **“Page Setup”** window, specify the paper format, orientation and margins.

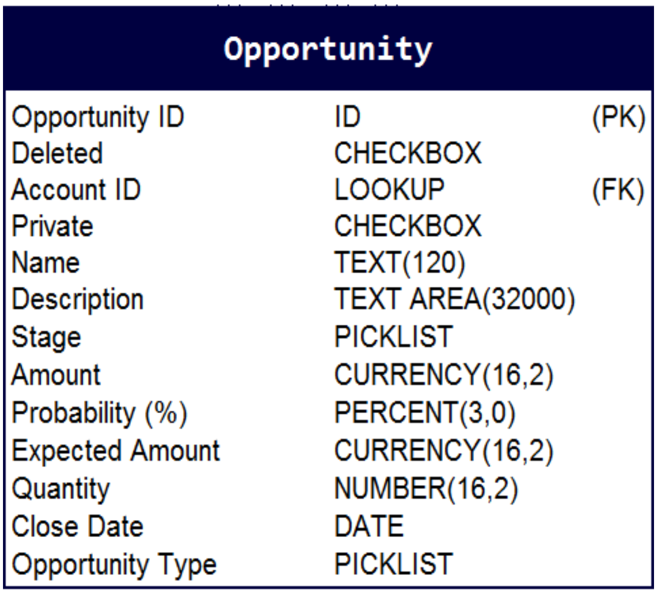
2. Confirm the changes by clicking “OK”.

Available in: Standard, Professional and Enterprise Editions

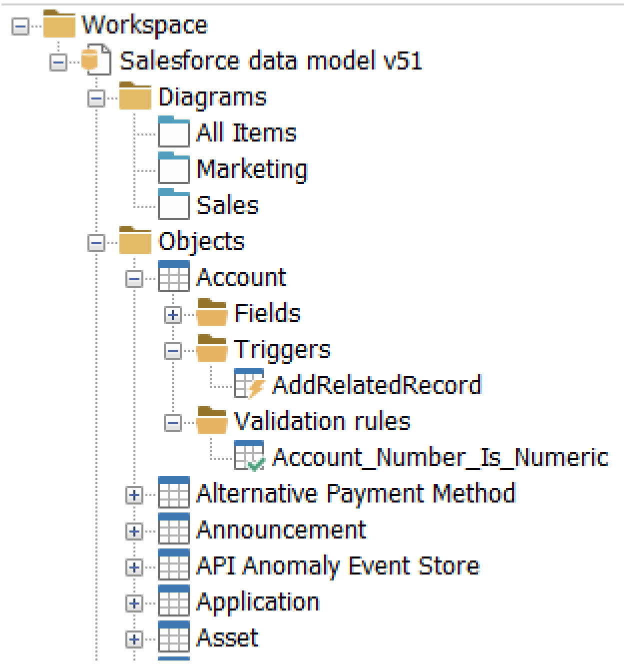
Objects

Objects

To access the **“Object”** management form, double click on its graphical representation in the diagram:



You can also open the “Object” management form by double clicking on the name of the object from the treeview.



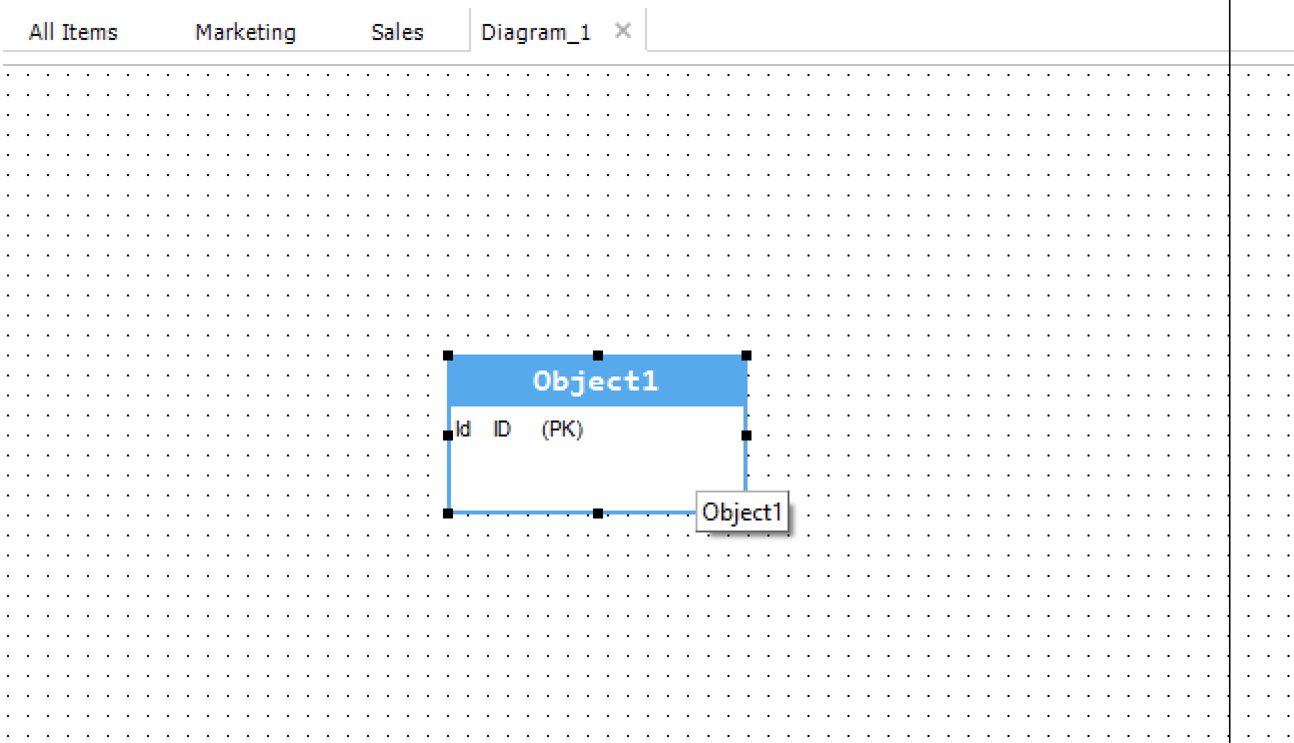
Available in: Standard, Professional and Enterprise Editions

Create a new object

To create a new object in the current project, a simple point-and-click is enough. To do so:

1. Click on "Add Object" in the palette:

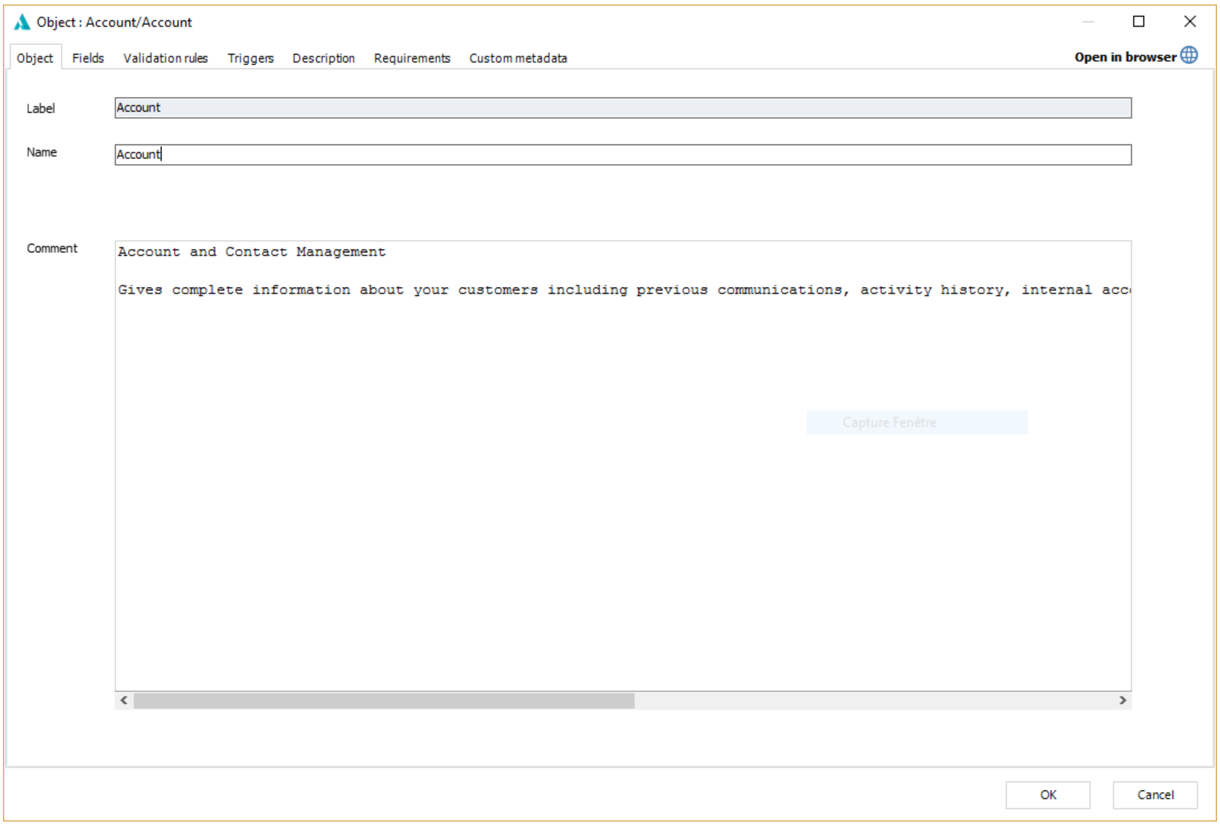
2. Then click on the diagram canvas to create the object:



Available in: Enterprise Edition

Edit an object

To edit an object, open the "object" management form by double-clicking on it. In this interface, the object can be renamed and comments can be added.



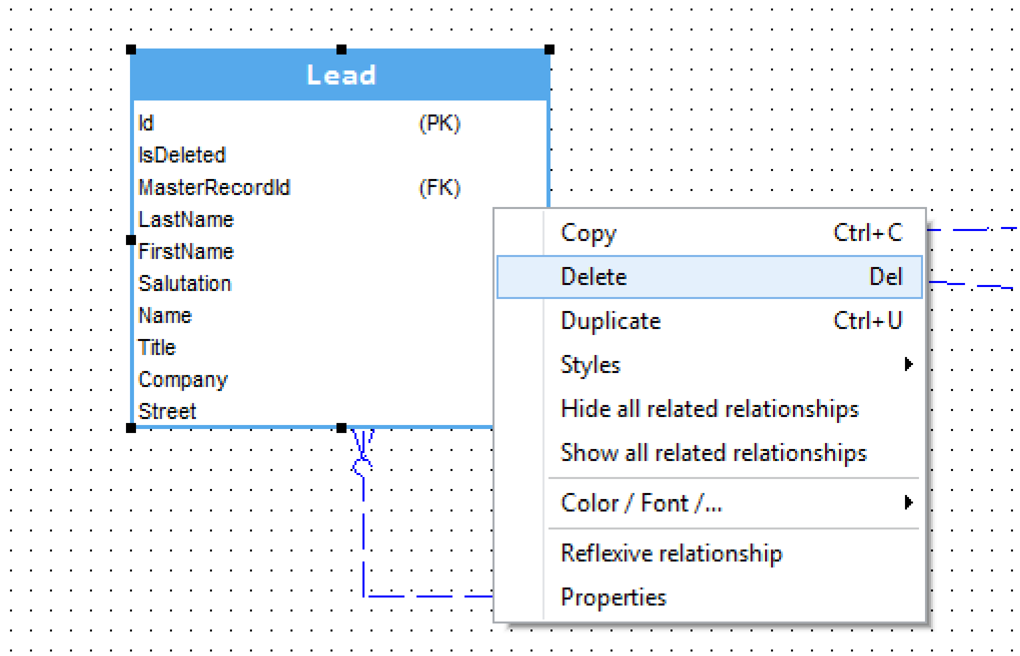
Note that fields, validation rules, triggers, and requirements can be edited from this form. Editing the aforementioned properties is further discussed in the upcoming sections.

Available in: Enterprise Edition

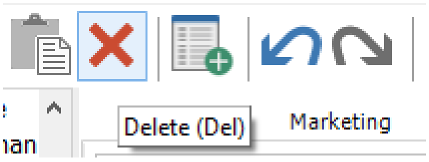
Delete an object

There are two ways to delete an object:

1. Right-click on its diagram graphical representation, and select **"Delete".**



2. Select its graphical representation and click on the **"Delete"** button on the toolbar.

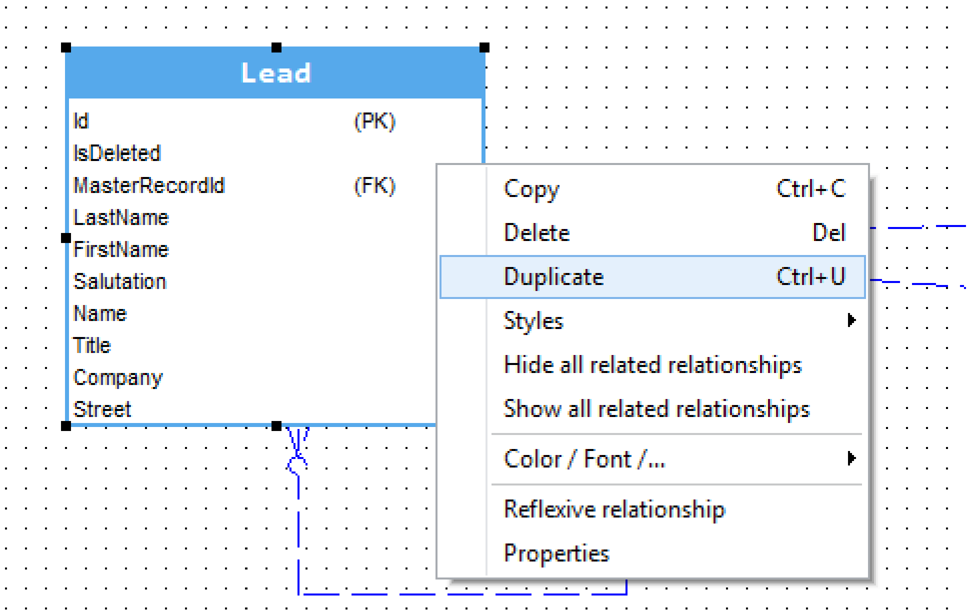


Available in: Standard, Professional and Enterprise Editions

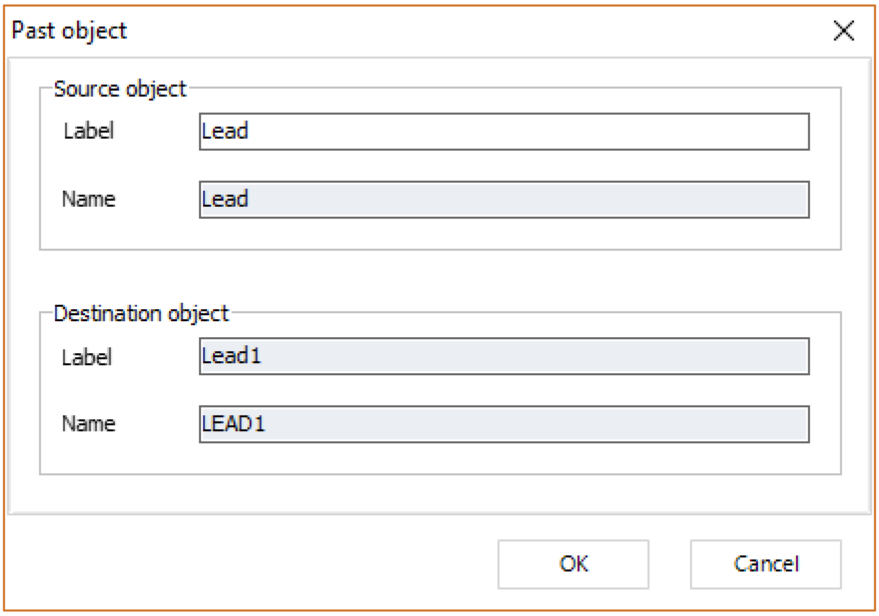
Duplicate an object

To duplicate an object:

1. Right-click on the object.
2. Click on "Duplicate" from the Contextual menu. You can also use the shortcut (Ctrl+U).



3. A past object window will appear. Enter the caption and name for the destination object.

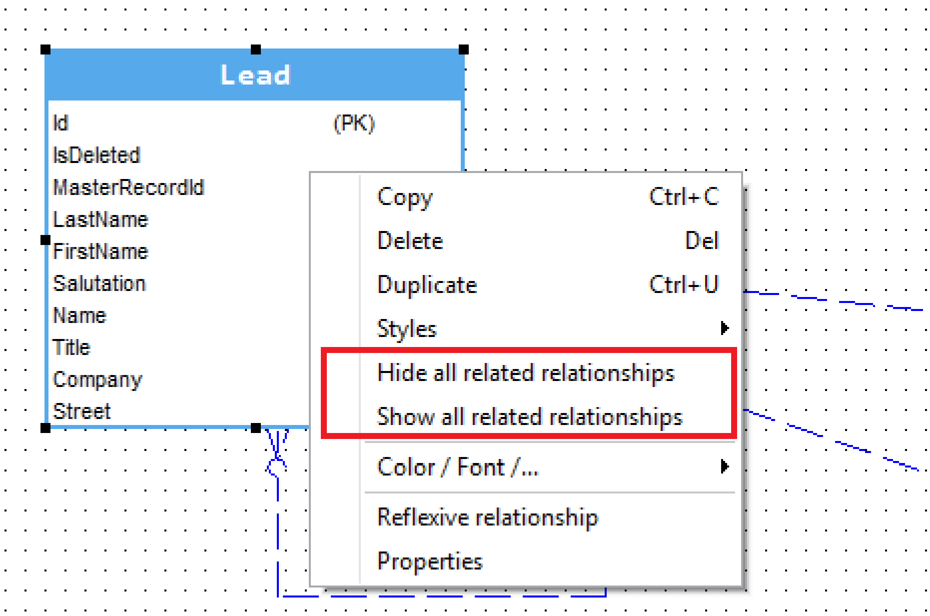


Available in: Enterprise Edition

Show/hide related relationships

To show or hide all related relationships of an object:

1. Right-click on **“Object”**.
2. Click on **“Hide all related relationships”** from the Contextual menu to hide all related relationships to this object, or click **“Show all related relationships”** to show them.

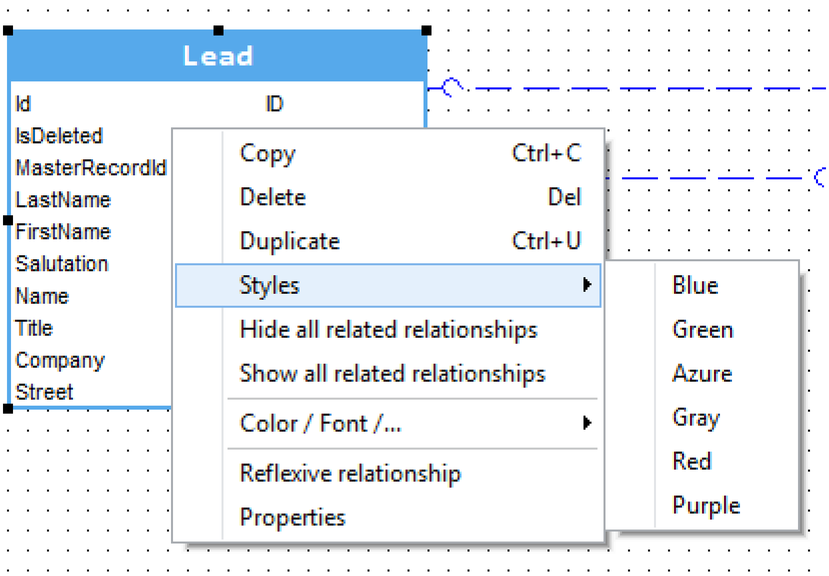


Available in: Standard, Professional and Enterprise Editions

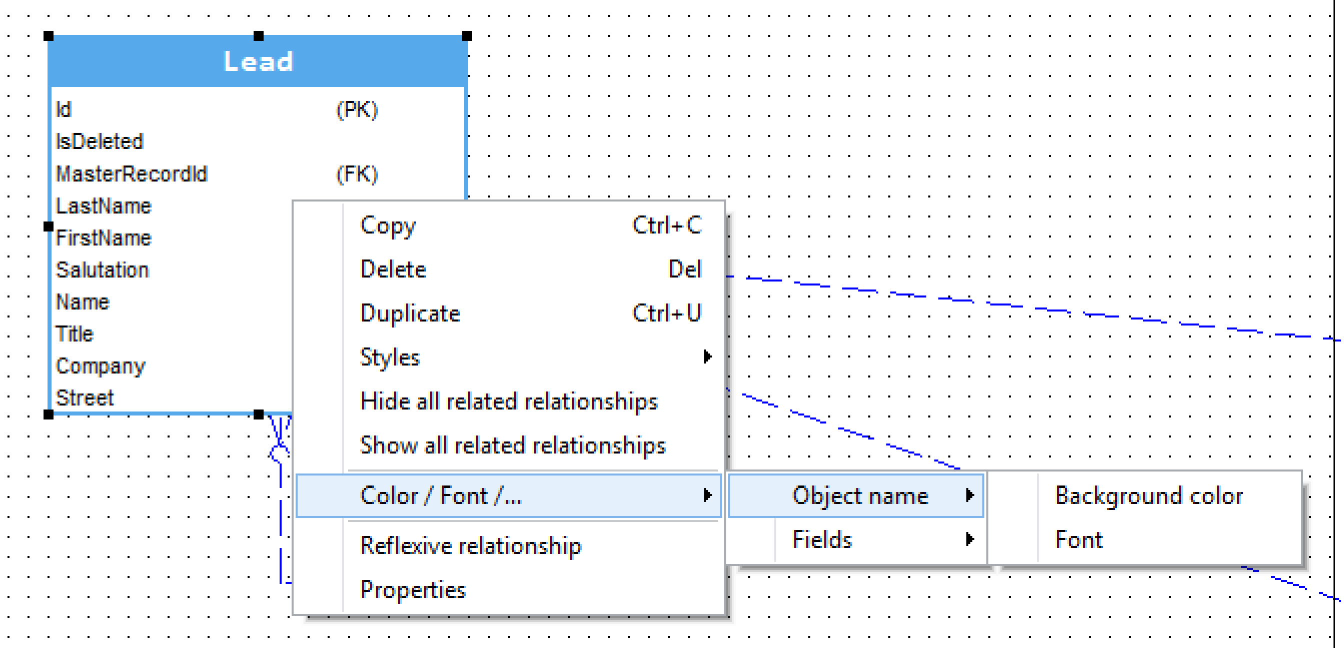
Object styles

To change the style or color of an object:

1. Right-click on **"Object"**.
2. Click on **"Styles"** from the Contextual menu. You will then see a list of styles:



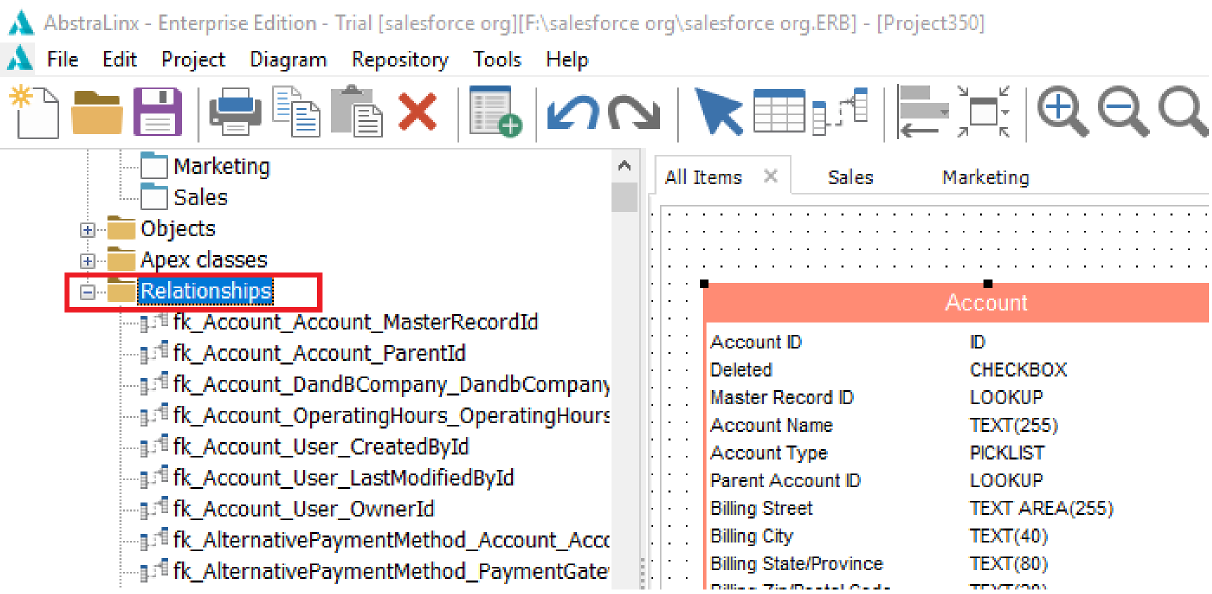
3. You can also customize the font, size, color, and much more by right clicking on the object, then go to **"Color/ Font/…"**



Available in: Standard, Professional and Enterprise Editions

Relationships

You can see all the relationships of your Salesforce organization from the "Treeview" on the left of the main screen.

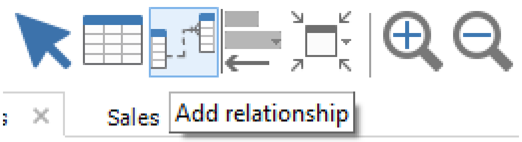


Available in: Standard, Professional and Enterprise Editions

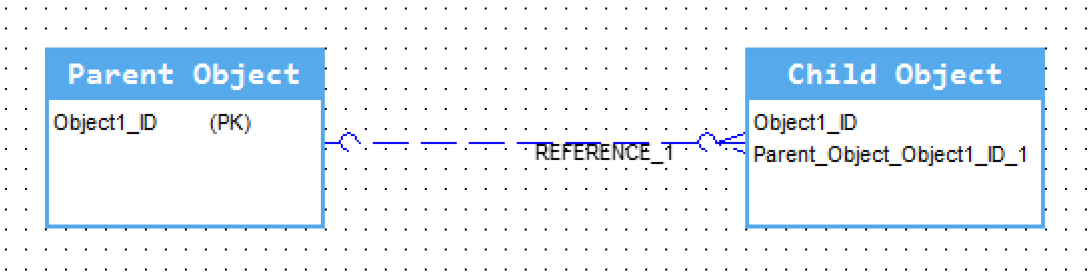
Create a new relationship

On AbstraLinx, you can create relationships between two objects or between an object and itself by linking the parent object to the child object. To add a new relationship:

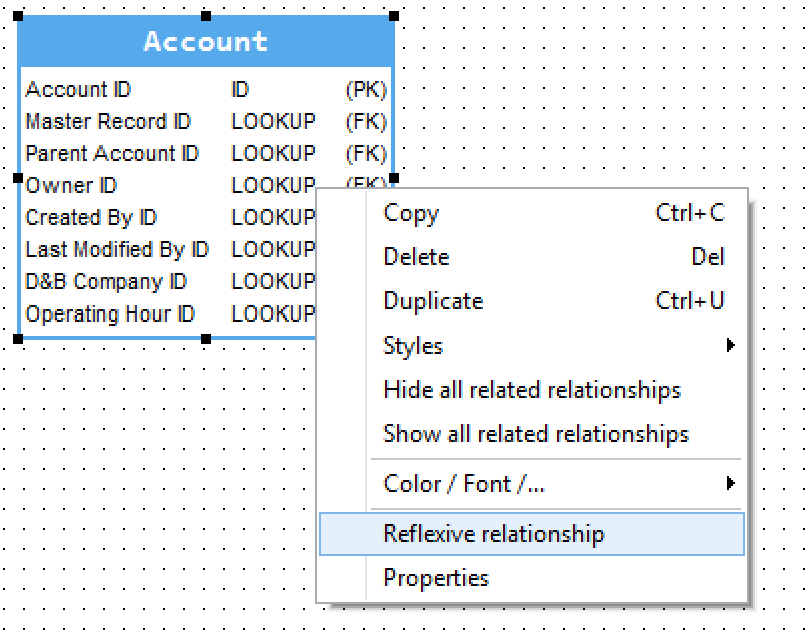
1. Click on "Add relationship" icon in the palette:



2. On the diagram canvas, click on the parent object symbol, hold the mouse click and drag the cursor to the child object. This is how a simple relationship is displayed:



3. To create a reflexive relationship, right-click on the object, and then click on **"Reflexive relationship"** from the contextual menu.

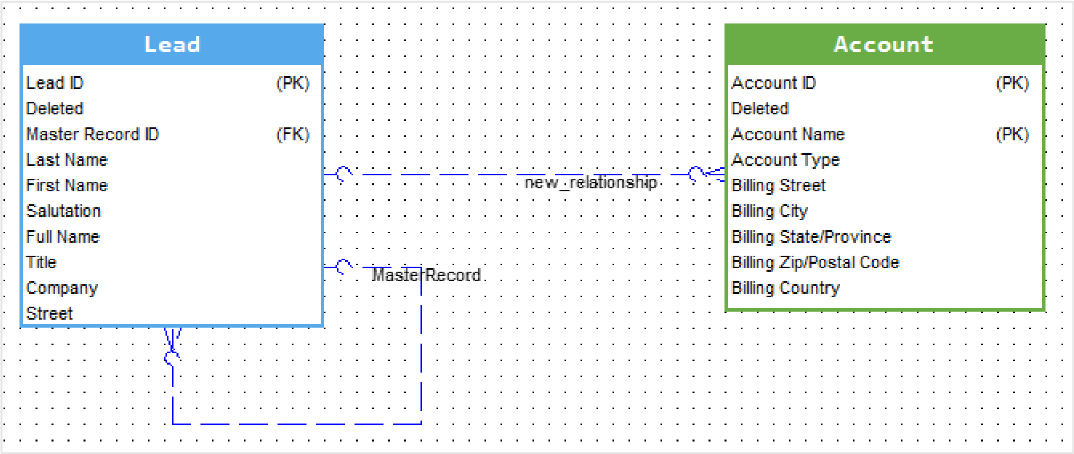


Available in: Enterprise Edition

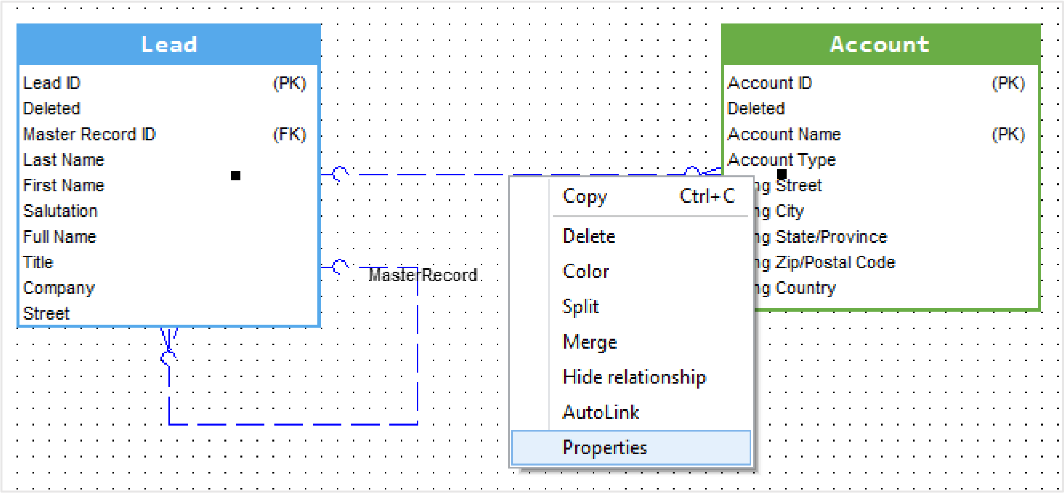
Edit a relationship

To edit an existing relationship:

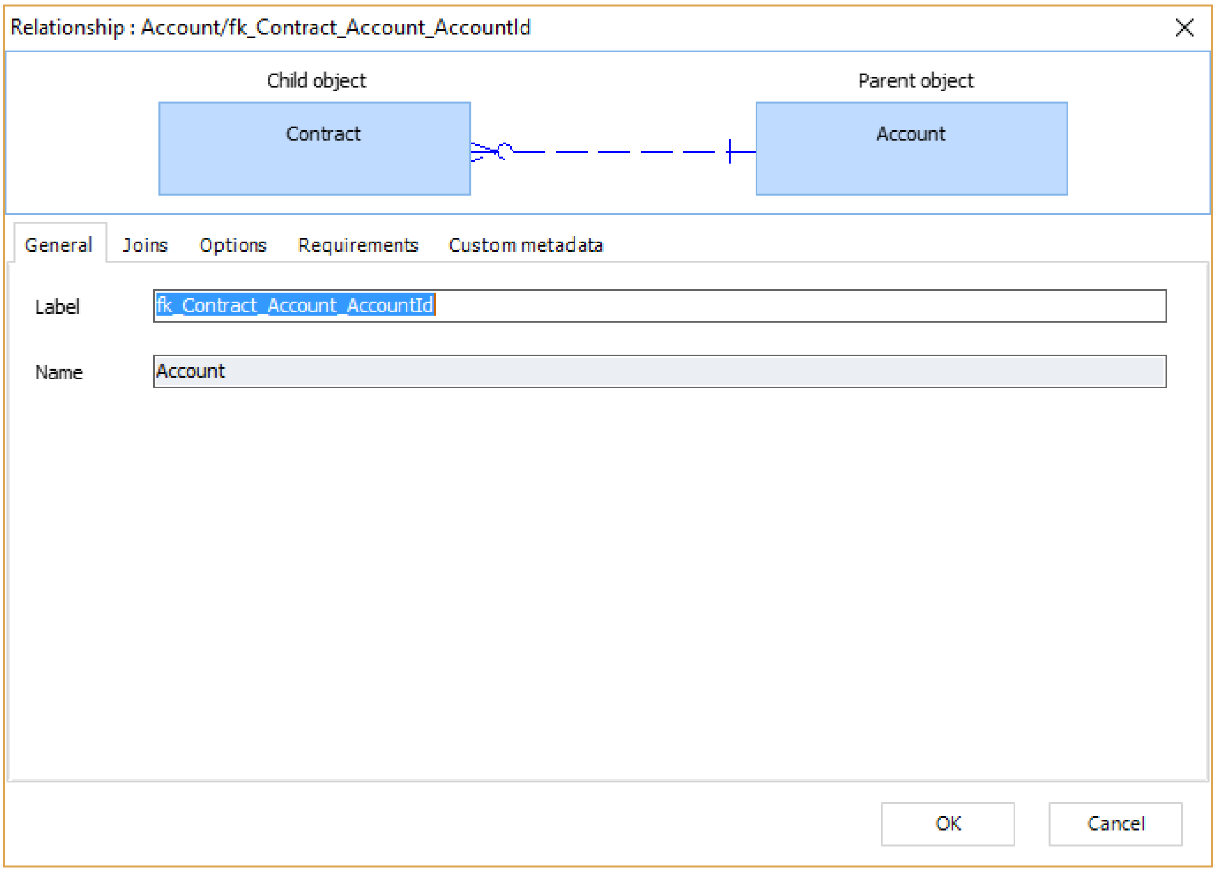
1. Double click on the corresponding graphical representation:



2. Or right-click on the relation, and select “Properties”:



Once the relationship is in edit mode, its name, label and constraint name can be changed. You can also assign requirement to the relationship.

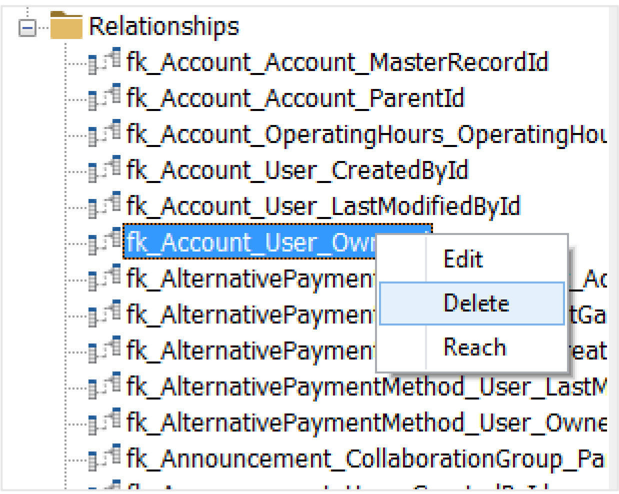


Available in: Enterprise Edition

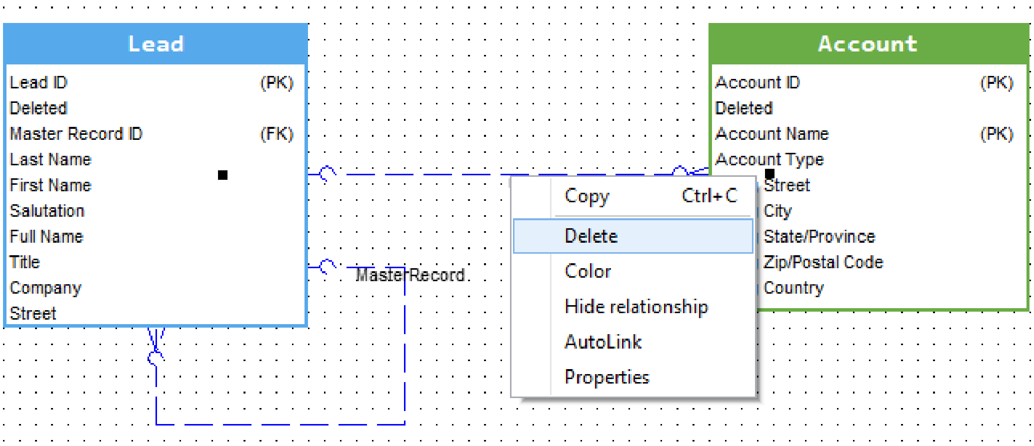
Delete a relationship

To delete a relationship:

1. Right click on the matching treeview item and click on the "Delete".



2. Alternatively, right-click on the corresponding graphical representation and select **"Delete".**

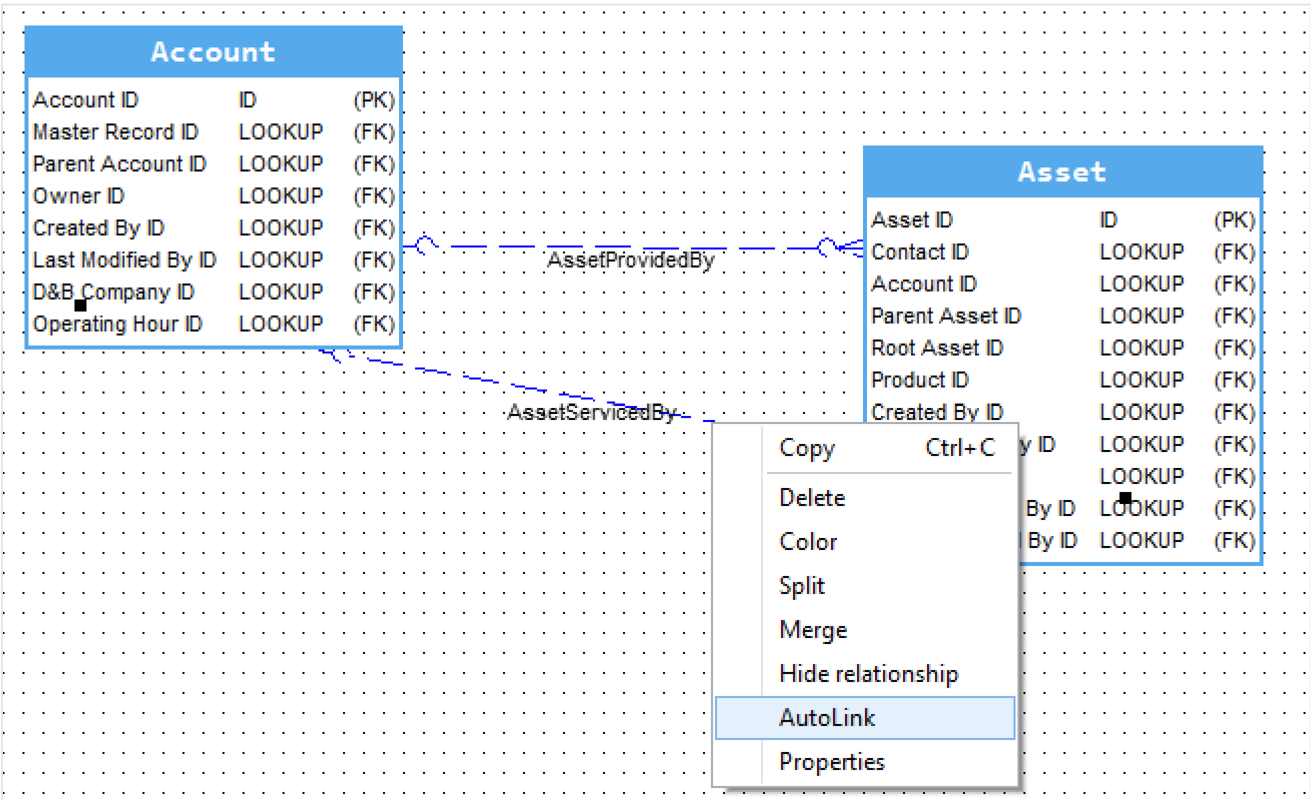


Note that confirmation is necessary for the prompt dialog box.

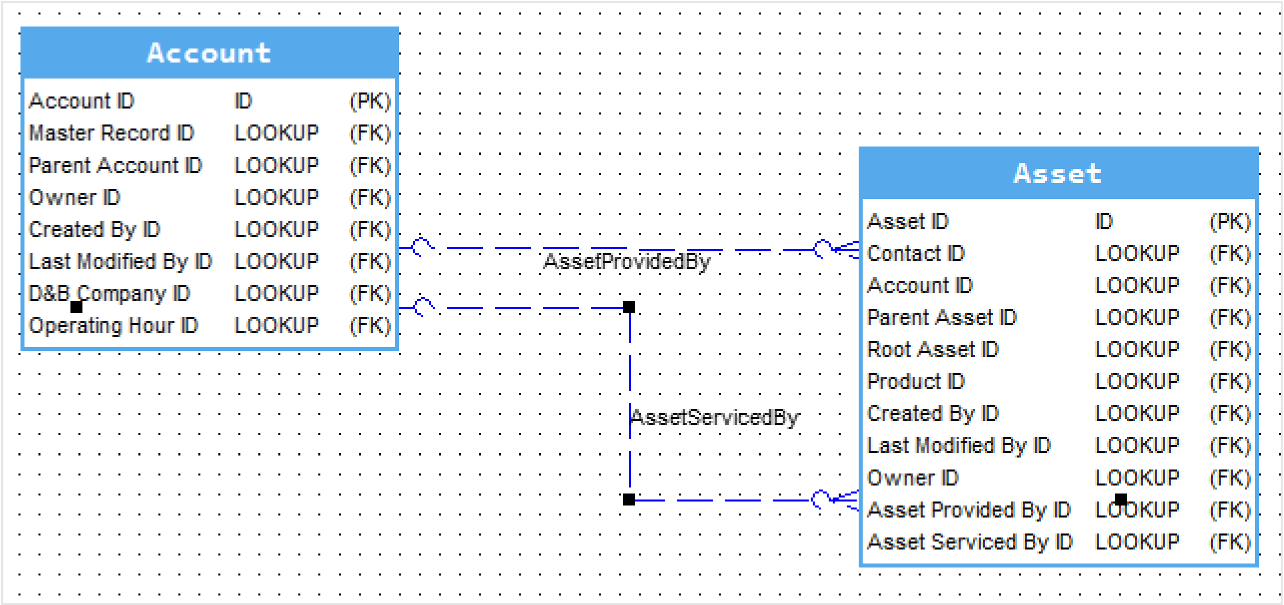
Available in: Standard, Professional and Enterprise Editions

Autolink Relationship

You can transform a simple relation to auto-link by right clicking the relationship in the diagram and click on **"AutoLink"**.



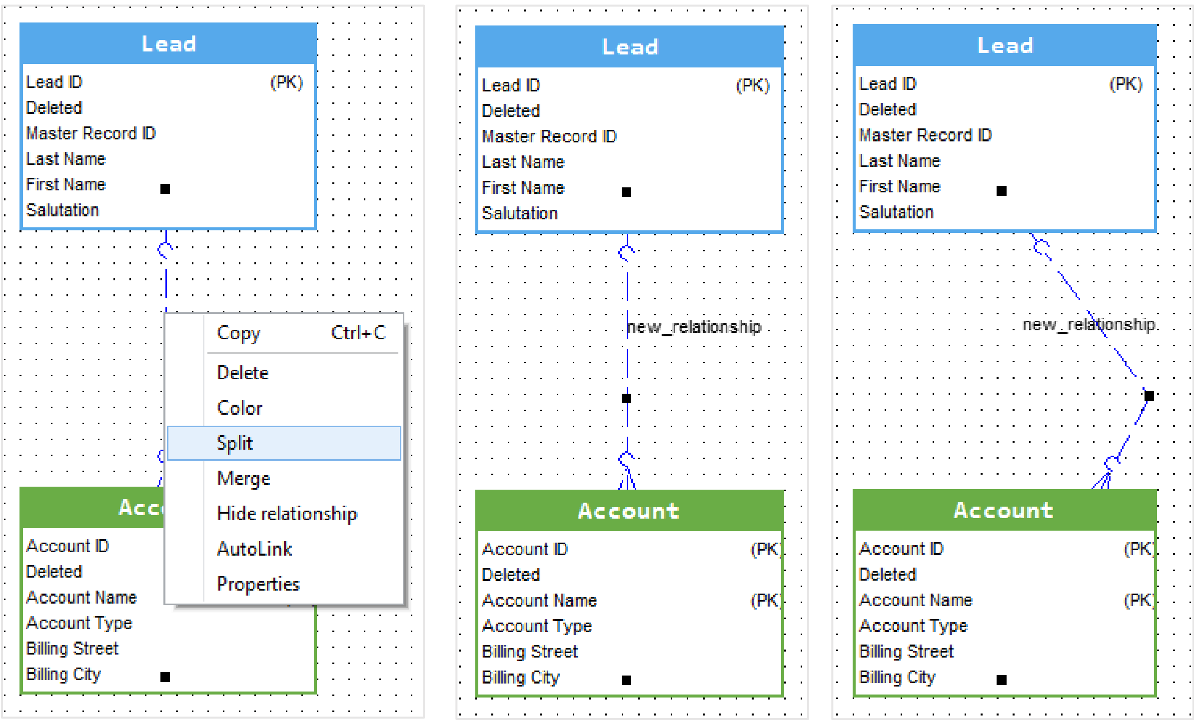
This is what the relationship looks like after applying the auto-link option



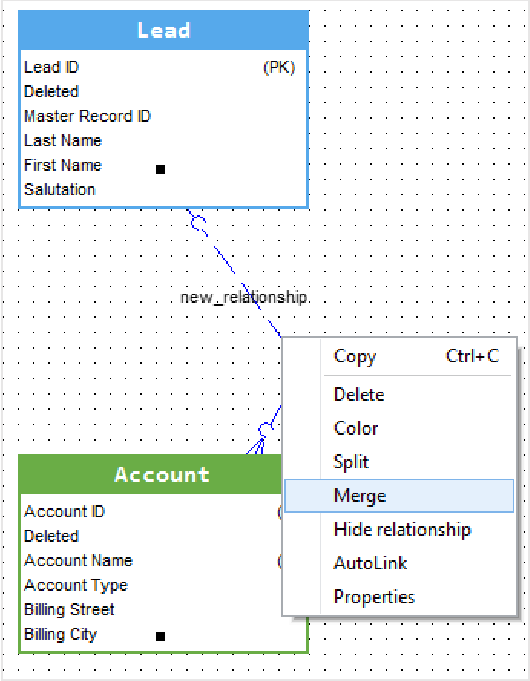
Available in: Standard, Professional and Enterprise Editions

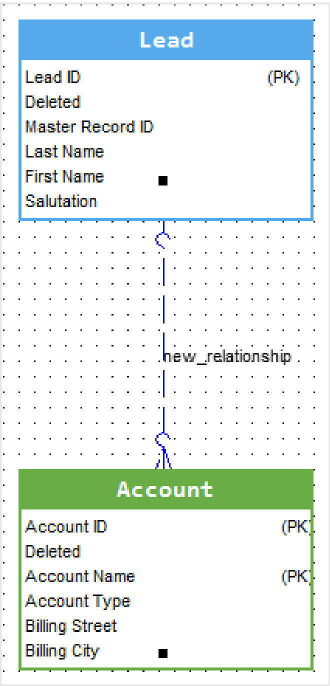
Split or merge relationships

You can split a relationship in a diagram by simply right-clicking on a relationship, clicking "Split", and then dragging the created split point to adjust the relationship line. Note that you cannot split a relationship when you are using the "Autolink" option.



To merge a split relationship, right-click on the relationship and then click **"Merge".**

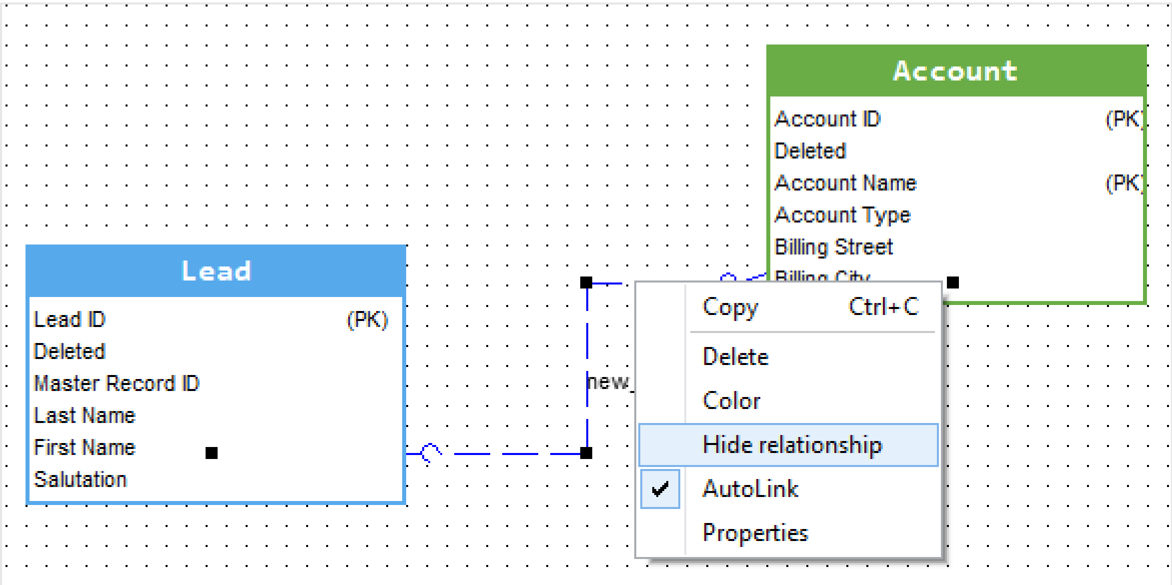




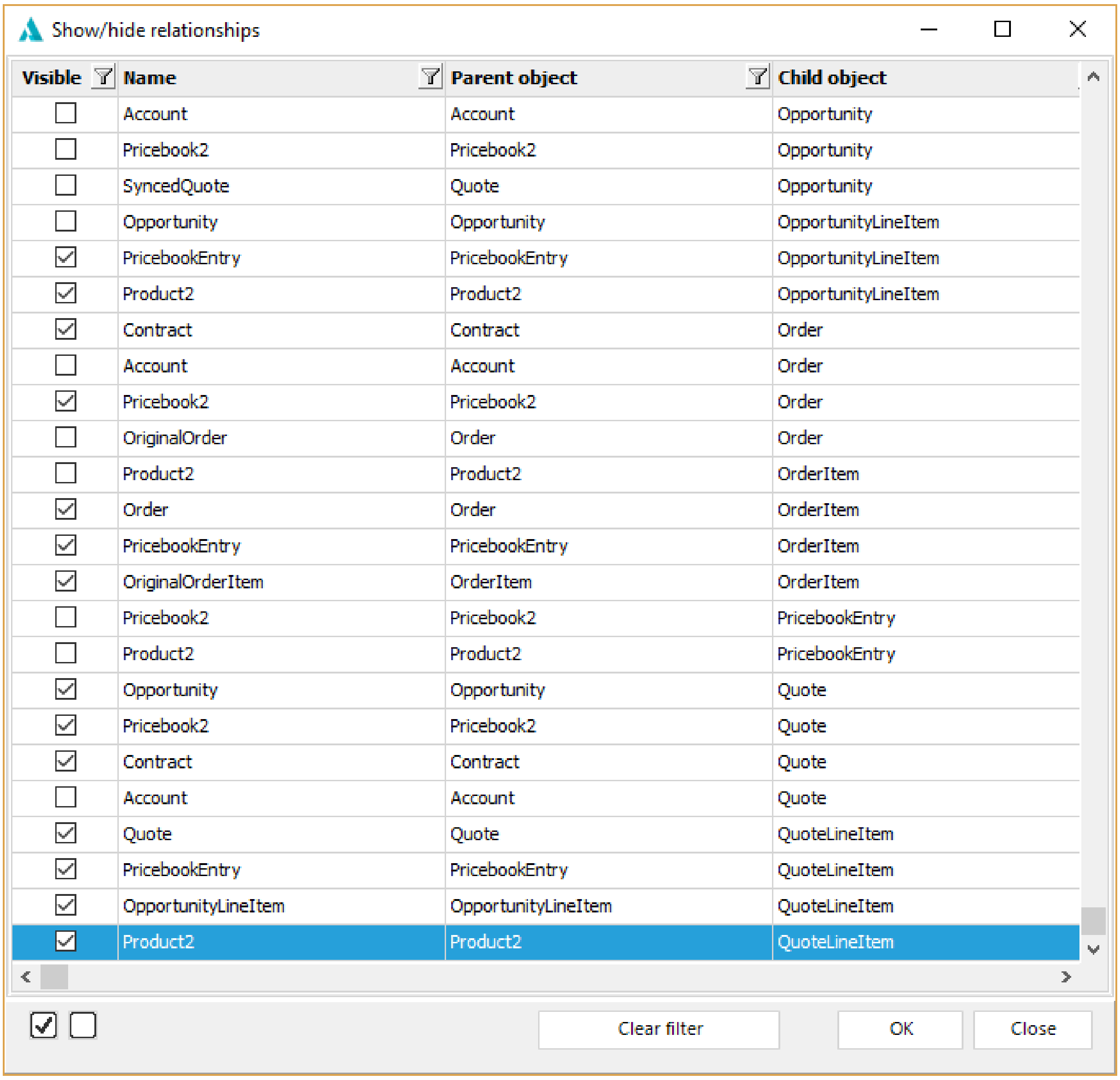
Available in: Standard, Professional and Enterprise Editions

Show/hide a relationship

To hide a specific relationship, right click on the relationship in the diagram and then click on **"Hide relationship"**



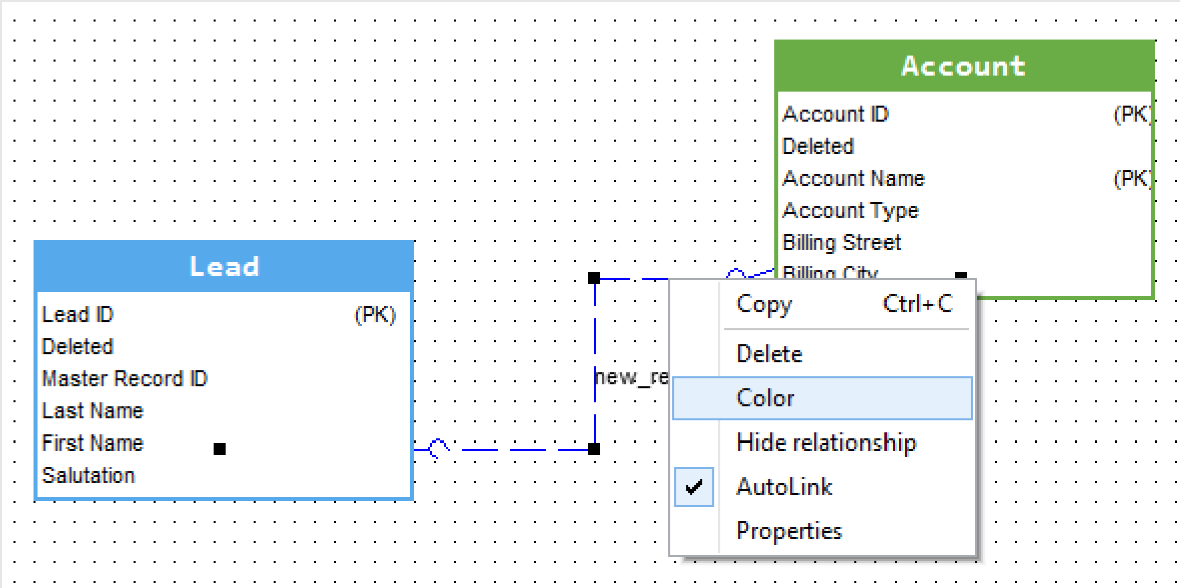
To display the relationship you just hide, go to **"Diagram | Show/hide relationships"** and search for your relationship then check it to be visible again.



Available in: Standard, Professional and Enterprise Editions

Relationship styles

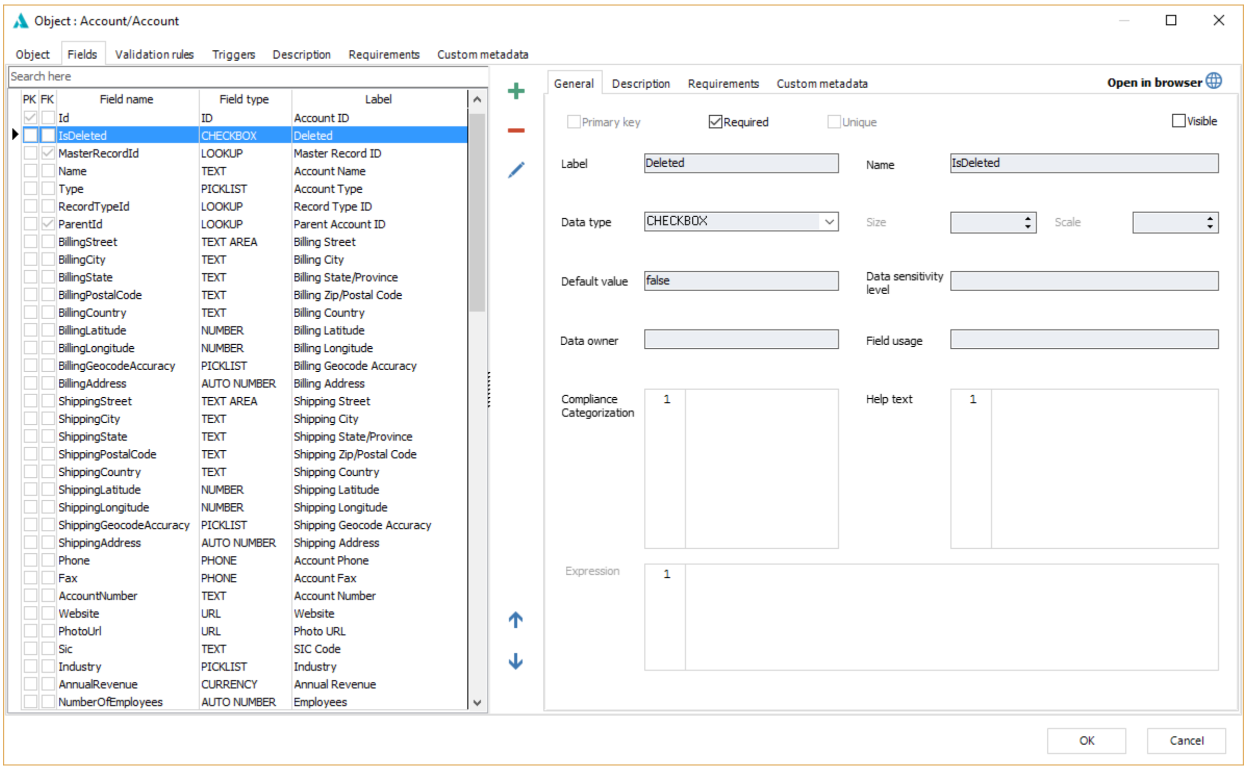
To change the color of a relationship, right click on the relationship in the diagram and then click on "Color".



Available in: Standard, Professional and Enterprise Editions

Fields

In the **"Object"** management dialog box, the **"Fields"** management form is shown by clicking on the **"Fields"** tab.



You can set a field as an invisible field by checking the "Visible" checkbox. This field will be hidden from the object on the diagram canvas.

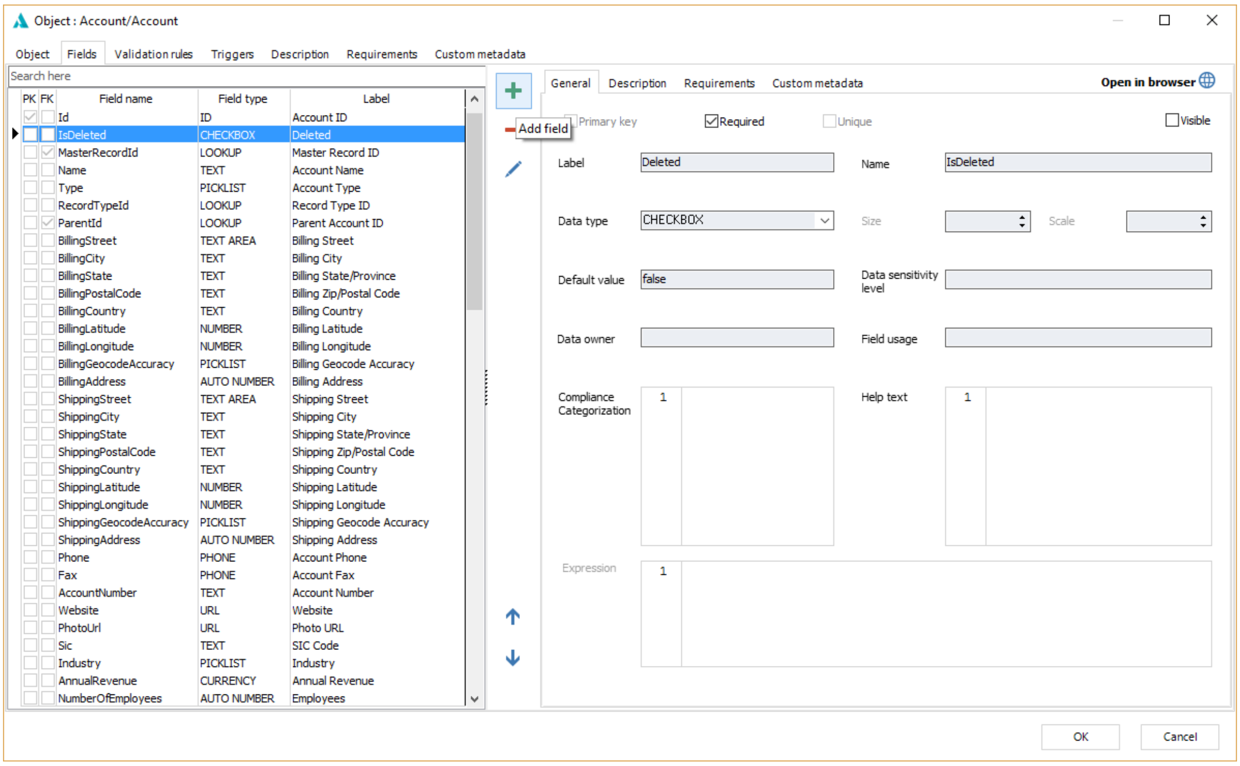
You can also open the web page of this field on the browser by clinking on the "Open in browser" link.

Available in: Standard, Professional and Enterprise Editions

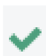
Create a new field

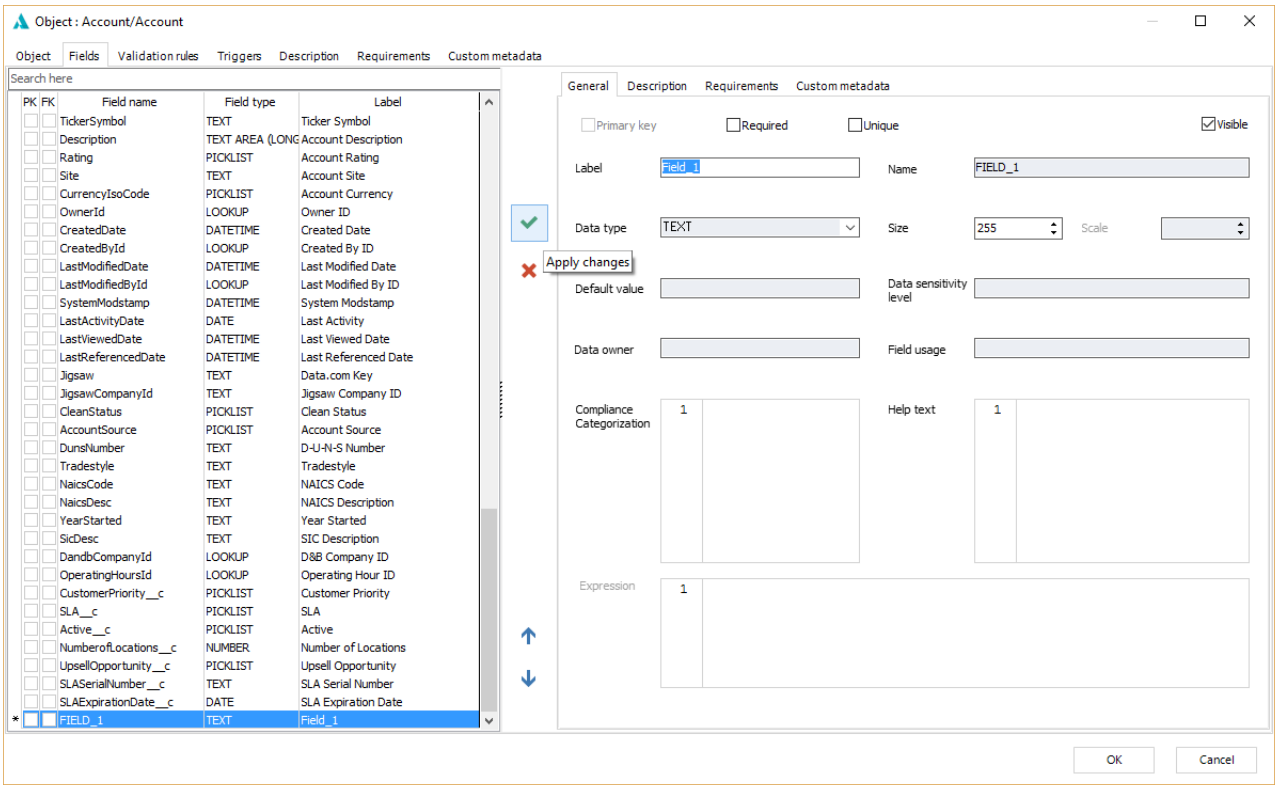
To create a new field for an object:

1. In the **"Fields"** management tab, click on 



2. Once you fill in the required entries, make sure to apply the changes by clicking on :



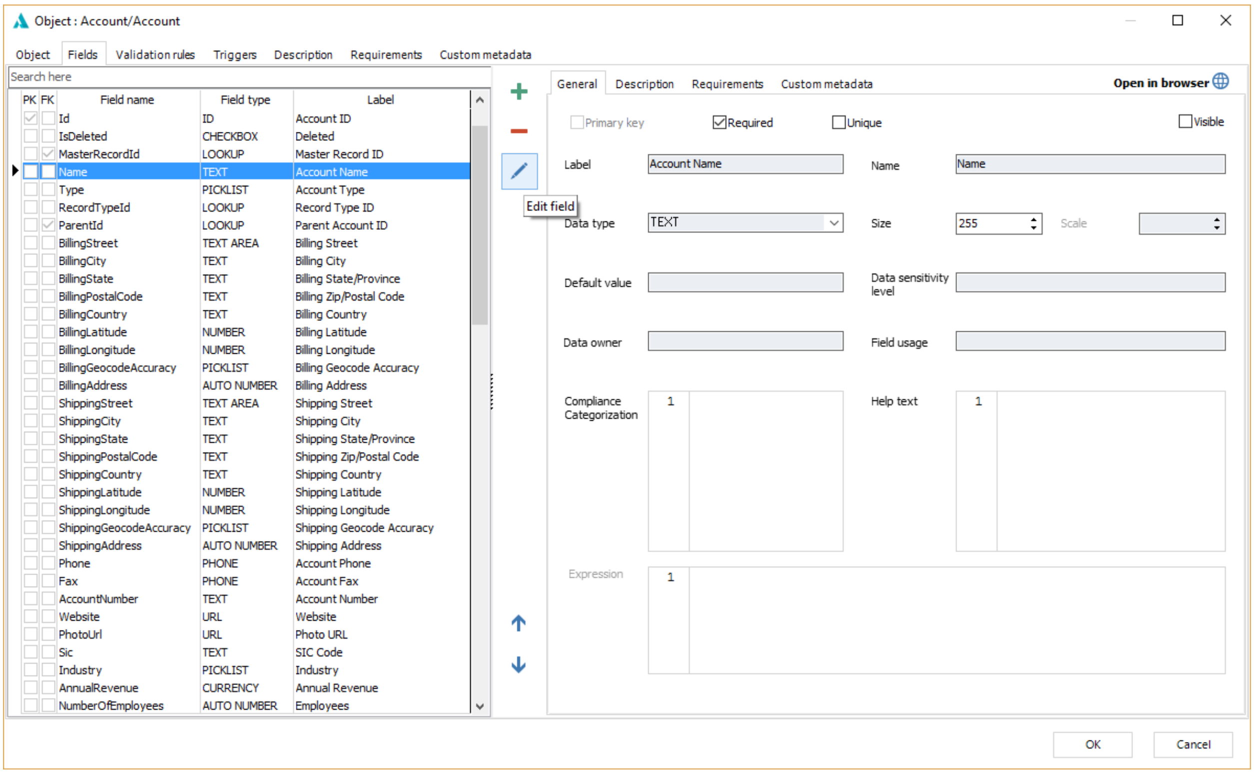


Available in: Enterprise Edition

Edit a field

To edit an existing field:

1. Click on  in the "Fields" management tab.
2. Once you edit the field, make sure to apply the changes by clicking on .



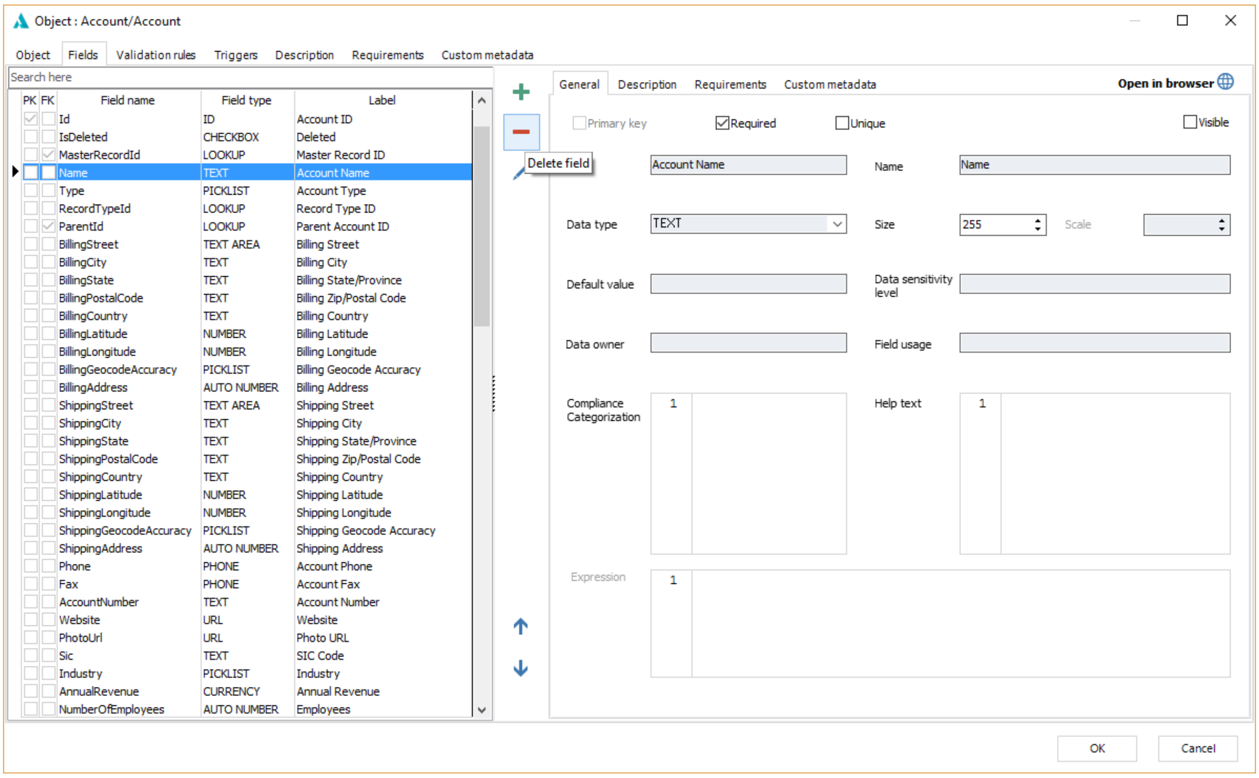
Once the field is in edit mode, you can edit its label, name, data type, description, and other characteristics. You can also assign a requirement to this field by going to the **"Requirements"** tab.

Note that you must first create at least one requirement before assigning them to the fields. Refer to the requirement section for more information.

Available in: Enterprise Edition

Delete a field

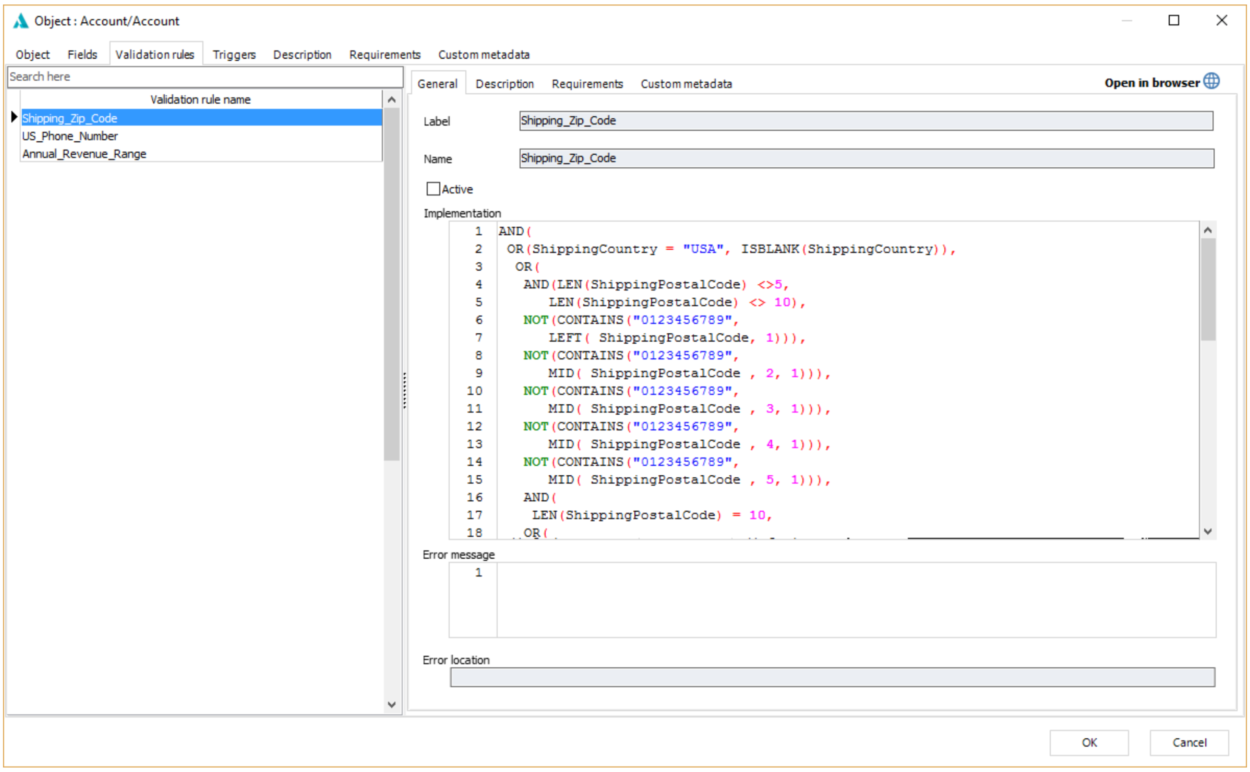
To delete an existing field, click on in the "Fields" management tab. Note that confirmation is necessary for the displayed prompt dialog box:



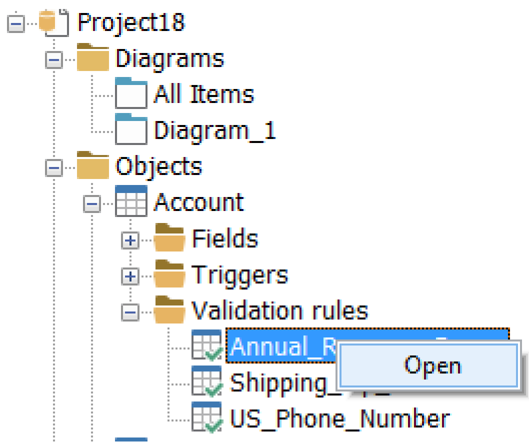
Available in: Enterprise Edition

Validation rules

To show the **validation rules** related to an object, open the object management form by double clinking on the “object” in the diagram and then select the **“Validation rules”** tab.



You can also navigate to the validation rule from the treeview on the left of the screen as shown in the picture below:



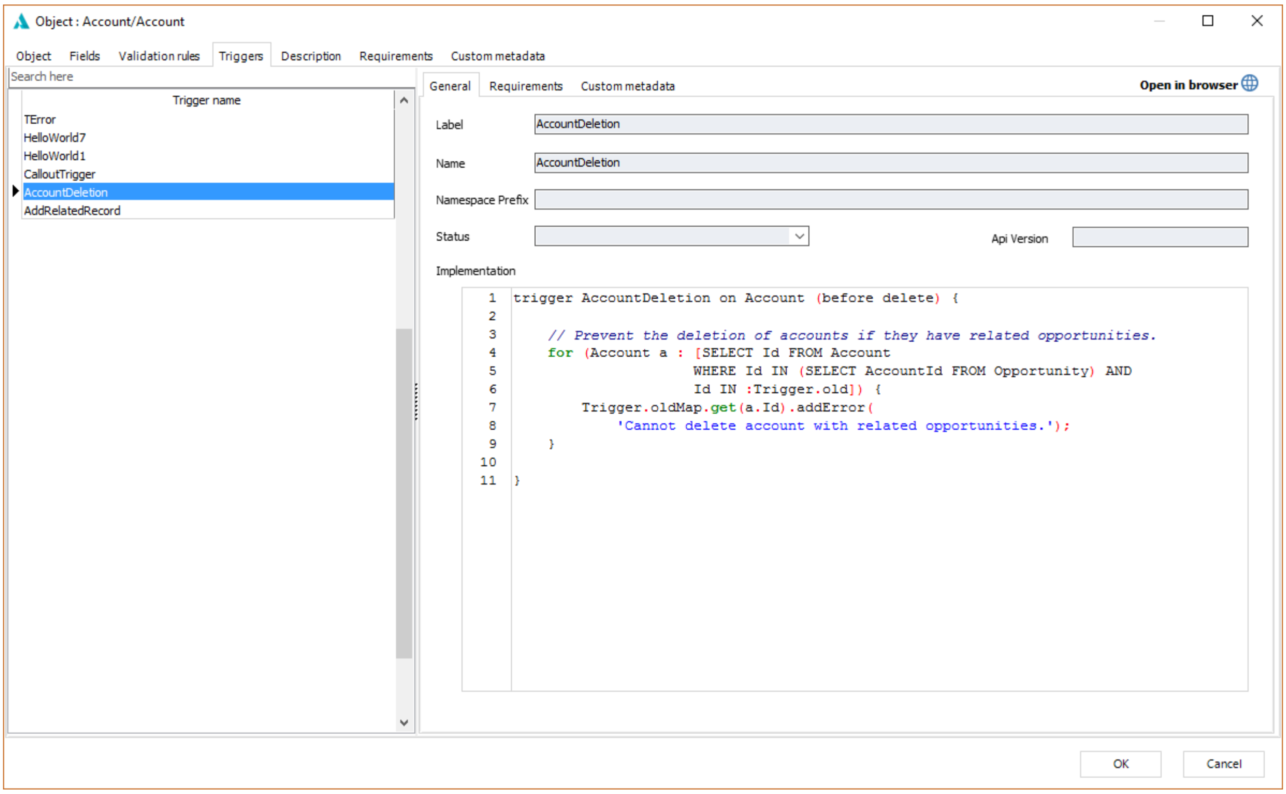
By going to the **"Requirements"** tab, you can attach requirements to a validation rule.

It is important to note that before adding requirements to a validation rule, you must first create them. For additional details, see the section about requirements.

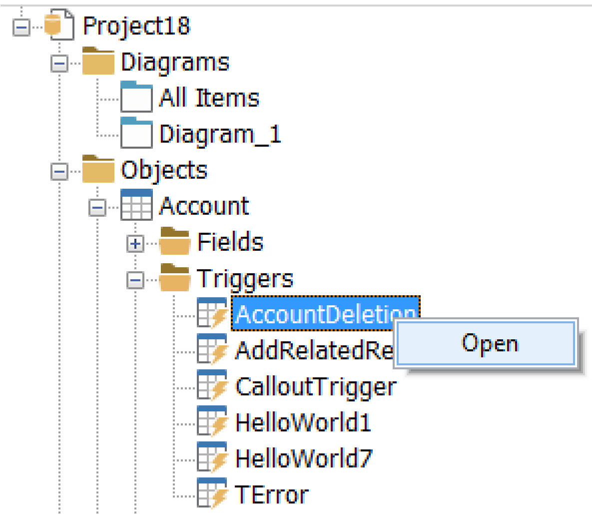
Available in: Standard, Professional and Enterprise Editions

Triggers

To show a **Trigger** related to an object, navigate to this object and open its management form, and then select the **"Triggers"** tab.



Alternatively, you can navigate to a trigger and open it from the treeview as follow:



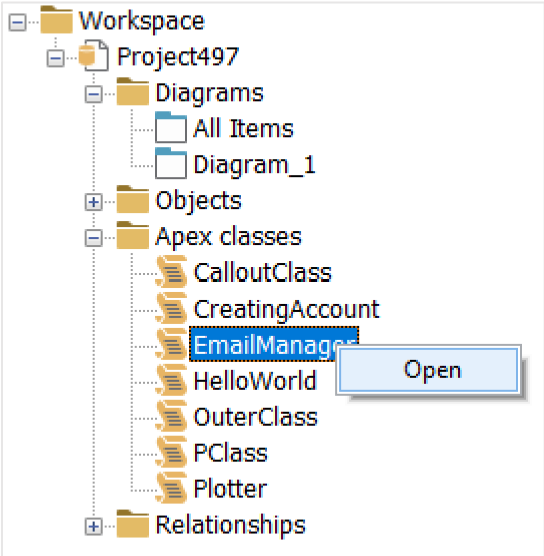
By going to the "Requirements" tab, you can assign requirements to a trigger.

Before adding requirements to triggers, keep in mind that you must first create them. For detailed information, see the section about requirements.

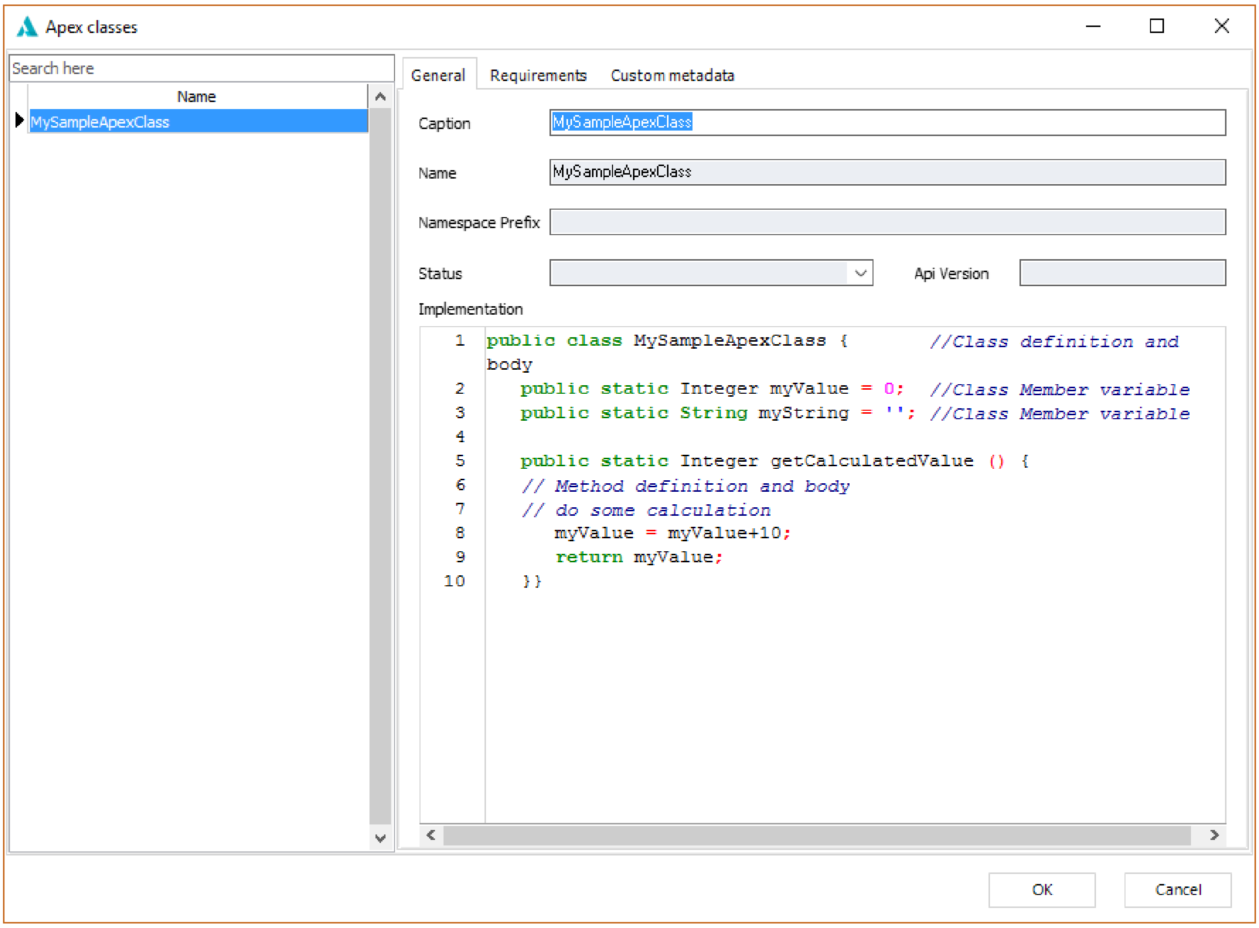
Available in: Standard, Professional and Enterprise Editions

Apex classes

To show the **Apex classes** of your Salesforce organization, double click on the name of the **"Apex class"** from the treeview. You can also access to the list of the Apex classes through the menu **"Project | Apex Classes"** or use the shortcut **"CTRL+ALT+R".**



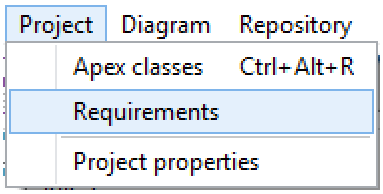
You can add requirements to an Apex class by going to the **"Requirements"** tab on the Apex class window. Refer to the section on requirements to learn more about how to create them.



Available in: Standard, Professional and Enterprise Editions

Requirements

To show the list of all requirements, navigate to the menu **"Project | Requirements"**.



Available in: Enterprise Edition

Create a new requirement

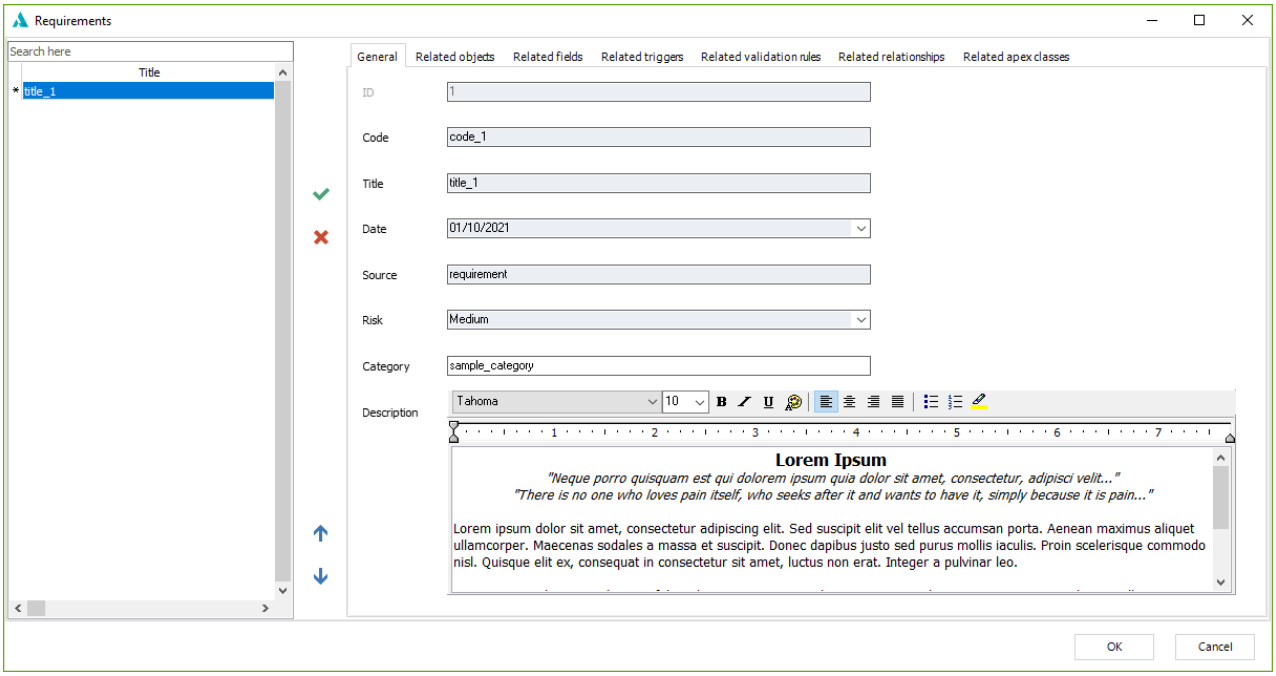
To create a new requirement, go to **"Project | Requirement"** from the main menu. In the opened window, click on the "Add" button to start creating a new requirement.

Fill in the following:

1. **ID**: filled automatically by AbstraLinx

2. **Code**: enter a code for the new requirement
3. **Title**: enter a title for the new requirement
4. **Date**: pick a date for the requirement created
5. **Source**: fill in the source of your requirement
6. **Risk**: define the requirement risk level (Undefined, high, medium, low)
7. **Category**: assign a category for the requirement
8. **Description**: describe the new requirement

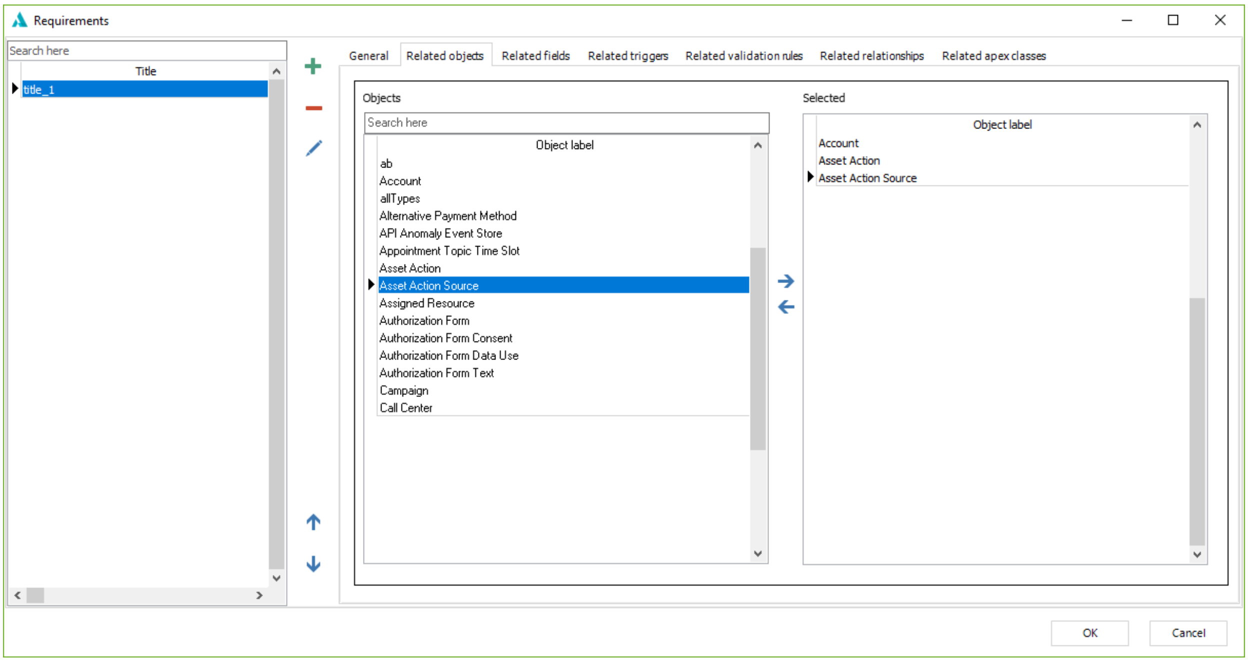
Click the “Apply” button to save your entries, then click on “OK”.



Available in: Enterprise Edition

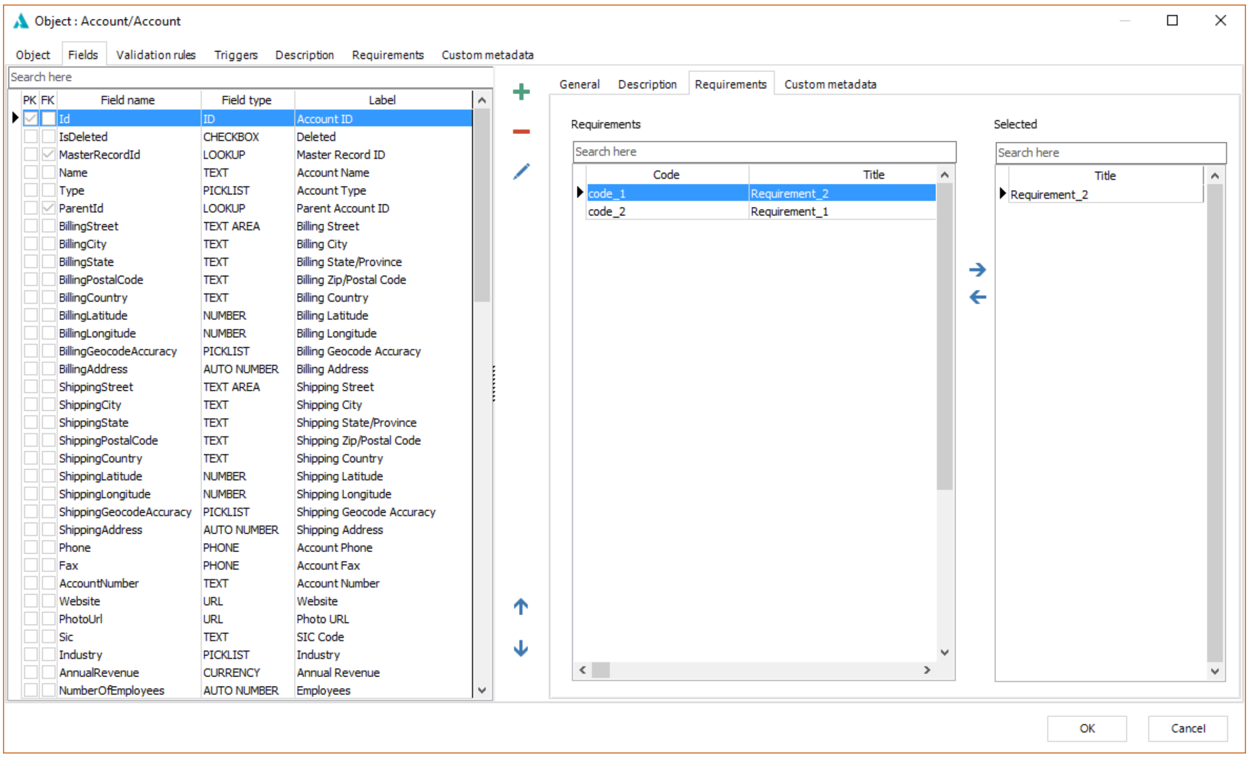
Assign a requirement

To assign a requirement to an object, navigate to the appropriate tab and then add the object you want to associate with this requirement. To add an object, select it, and then click on the right arrow to add it as shown in the following screenshot:



In the same way, you can assign this requirement to fields, triggers, validation rules, relationships and apex classes.

There is another way to associate a requirement with an object. Open the management form of the object that you want to add to it a requirement. Navigate to the **"Requirement"** tab then you can add multiple requirements from there.

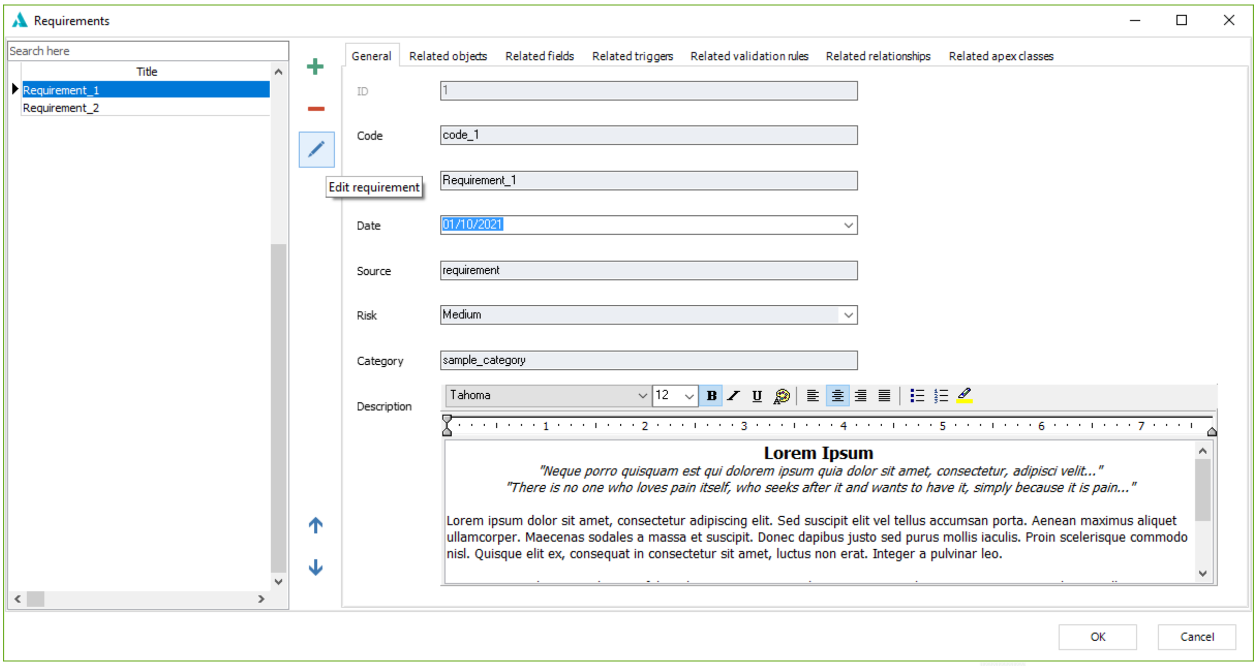


Available in: Enterprise Edition

Edit a requirement

To edit an existing requirement:

1. Open the **“Requirement”** window by going to **“Project | Requirements”**.
2. Select the requirement you want to edit and then click on the **“Edit”** button.



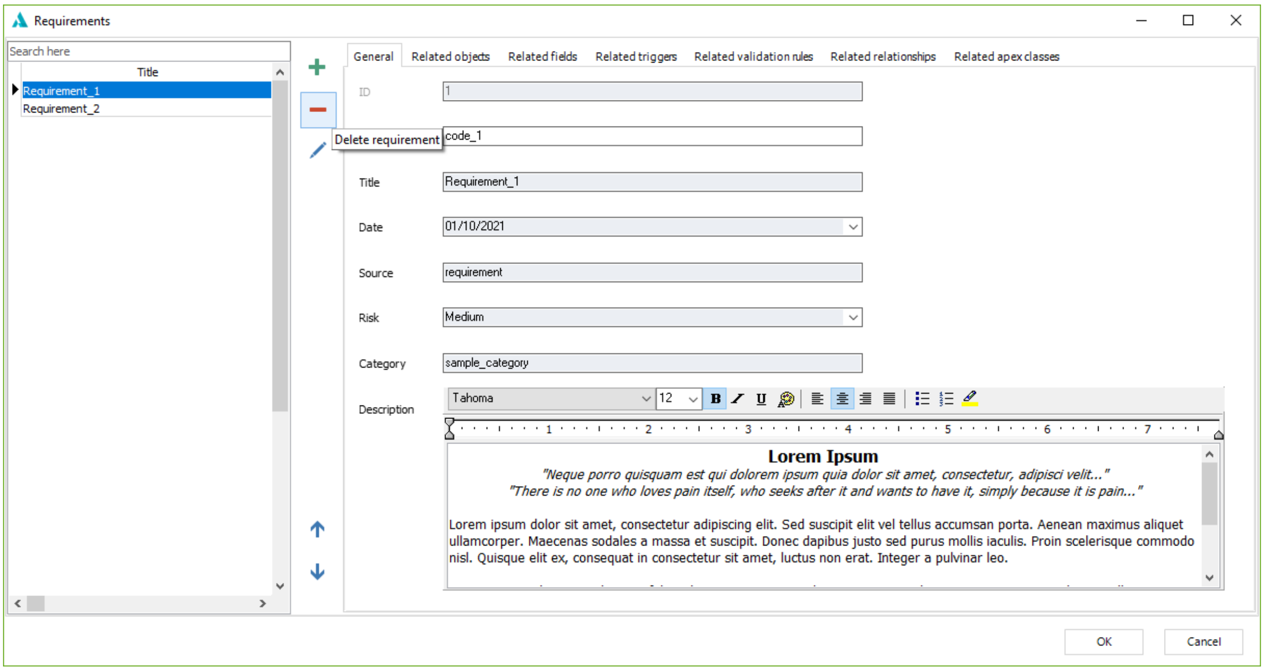
3. Once you edit the requirement, make sure to apply the changes by clicking on 

Available in: Enterprise Edition

Delete a requirement

To delete an existing requirement:

1. Open the **“Requirement”** window by going to **“Project | Requirements”**.
2. Select the requirement you want to delete and then click on the **“Delete”** button.
3. Note that confirmation is necessary for the displayed prompt dialog box.

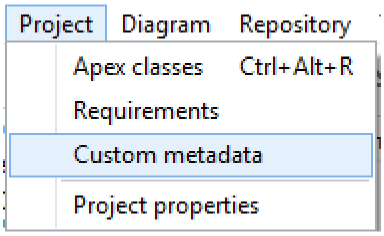


Available in: Enterprise Edition

Custom metadata

In this version, AbstraLinx integrates a functionality that allows the creation of custom metadata.

To show the list of all custom metadata, navigate to the menu **“Project | Custom metadata”**.



Available in: Enterprise Edition

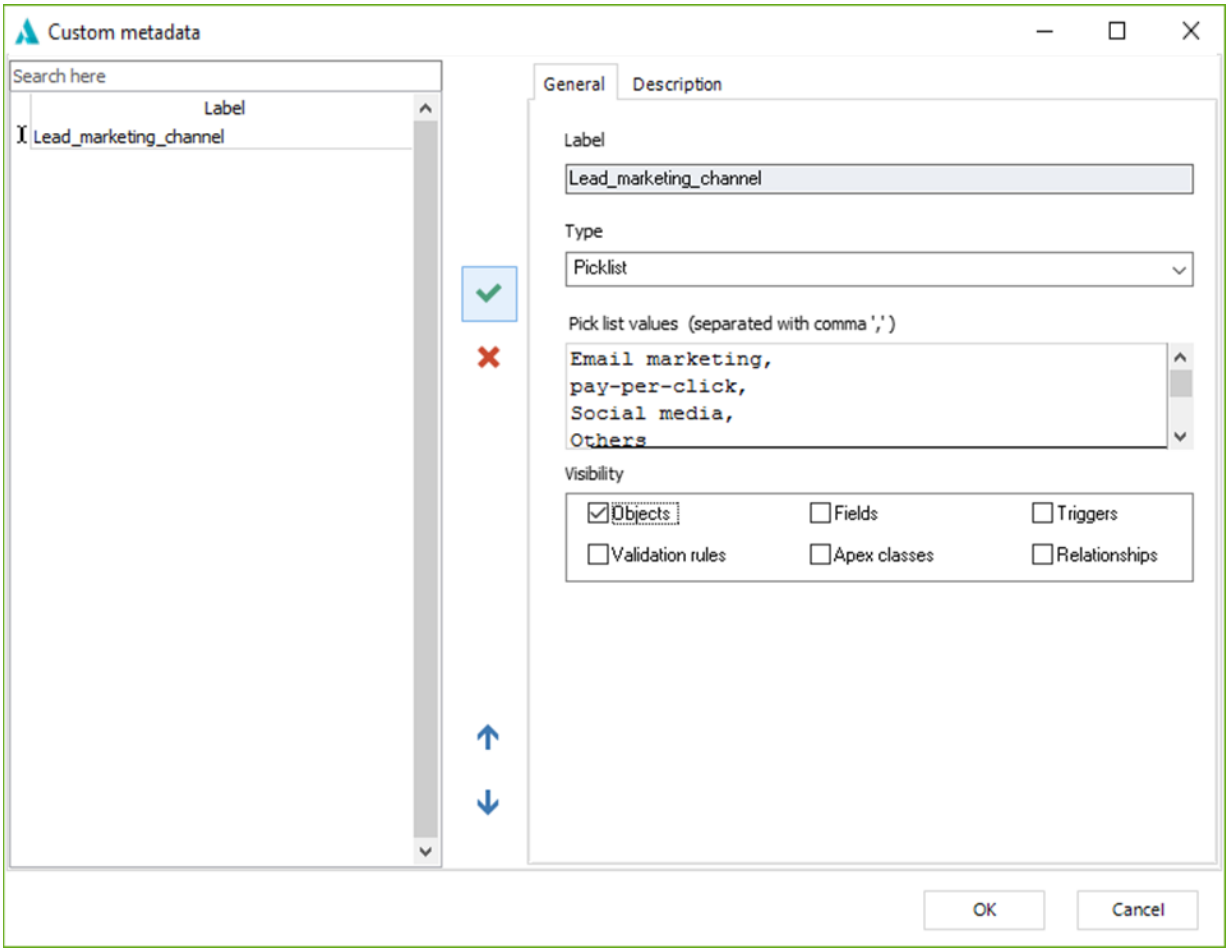
Create a new custom metadata

To create a new custom metadata, go to **“Project | Custom metadata”** from the main menu. In the opened window, click on the “Add” button to start creating a new custom field.

Fill in the following:

1. **Label**: enter a name for the custom metadata
2. **Type**: select from the dropdown menu the data type of the new custom metadata

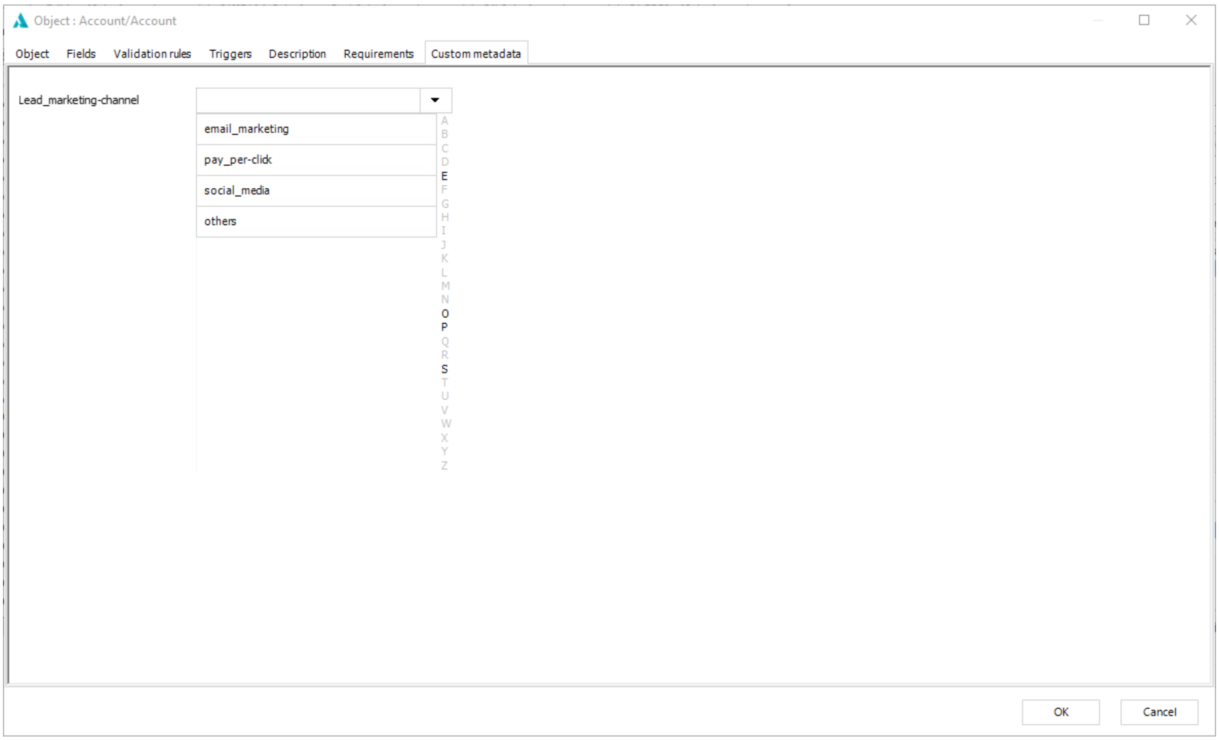
3. **Pick list values**: this field will be active only if you choose "picklist" or "picklist (multiple-values) as data type. Enter the values separated by a comma.
4. **Visibility**: choose in which objects this custom field will be visible. You can select: objects, fields, triggers, validation rules, apex classes, and relationships.
5. **Description**: add a few sentences that describes the new custom metadata.



Available in: Enterprise Edition

Assign a custom metadata

Once you have created your custom metadata, you can use them by opening the management form of the object you want to add on it a custom metadata. Go to the tab **"Custom metadata"** then define the value of the custom field. For the previous example, open an object, go to the custom metadata tab, and then define the value of the custom field **"lead marketing channel"**.

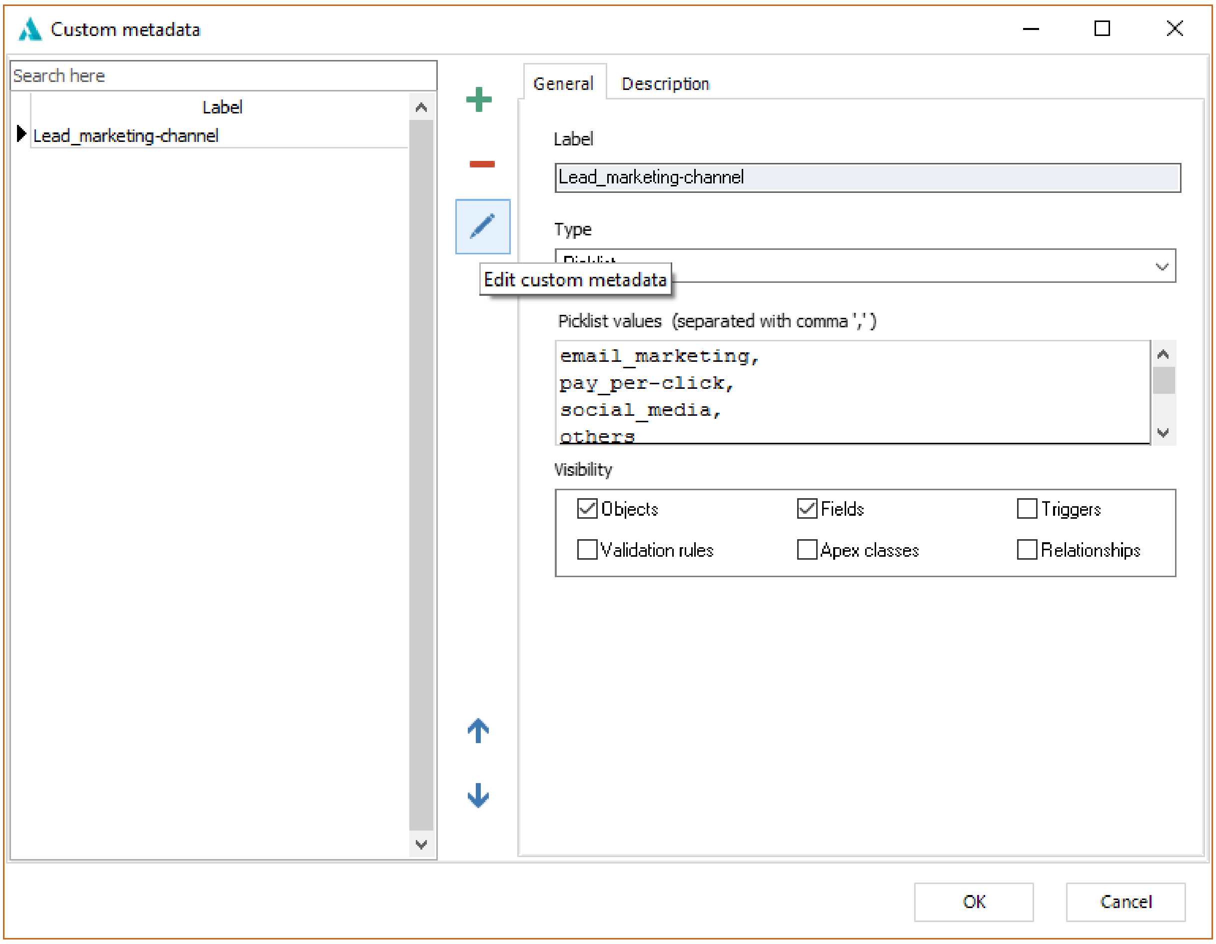


Available in: Enterprise Edition

Edit a custom metadata

To edit an existing custom metadata:

1. Open the **"Custom metadata"** window by going to **"Project | Custom metadata"**.
2. Select the custom metadata you want to edit and then click on the **"Edit"** button.



3. Once you edit the custom metadata, make sure to apply the changes by clicking on 

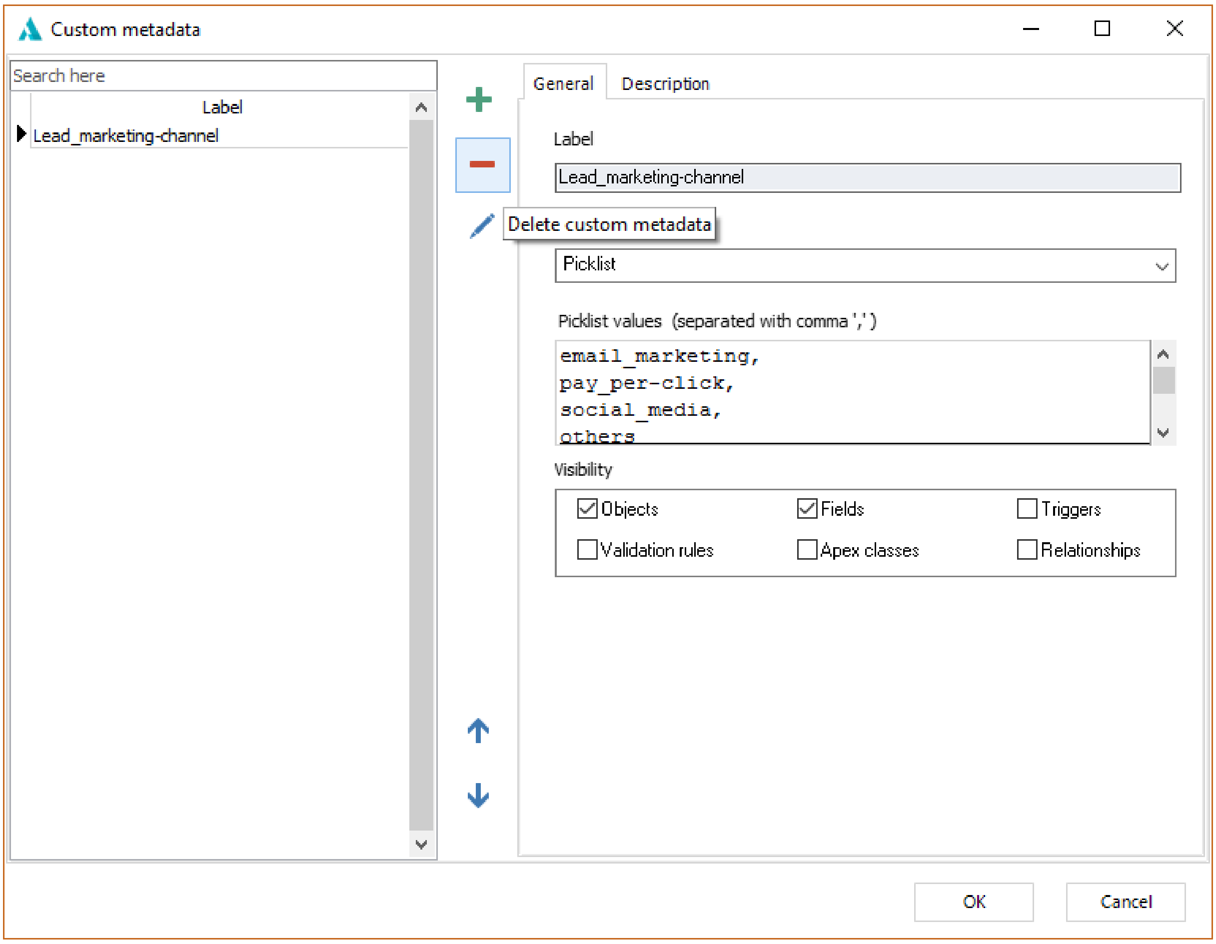
Note that if you have a custom metadata in use and you change its type, then its value will be reset.

Available in: Enterprise Edition

Delete a custom metadata

To delete an existing custom metadata:

1. Open the **"Custom metadata"** window by going to **"Project | Custom metadata"**.
2. Select the custom metadata you want to delete and then click on the **"Delete"** button.
3. Note that confirmation is necessary for the displayed prompt dialog box.



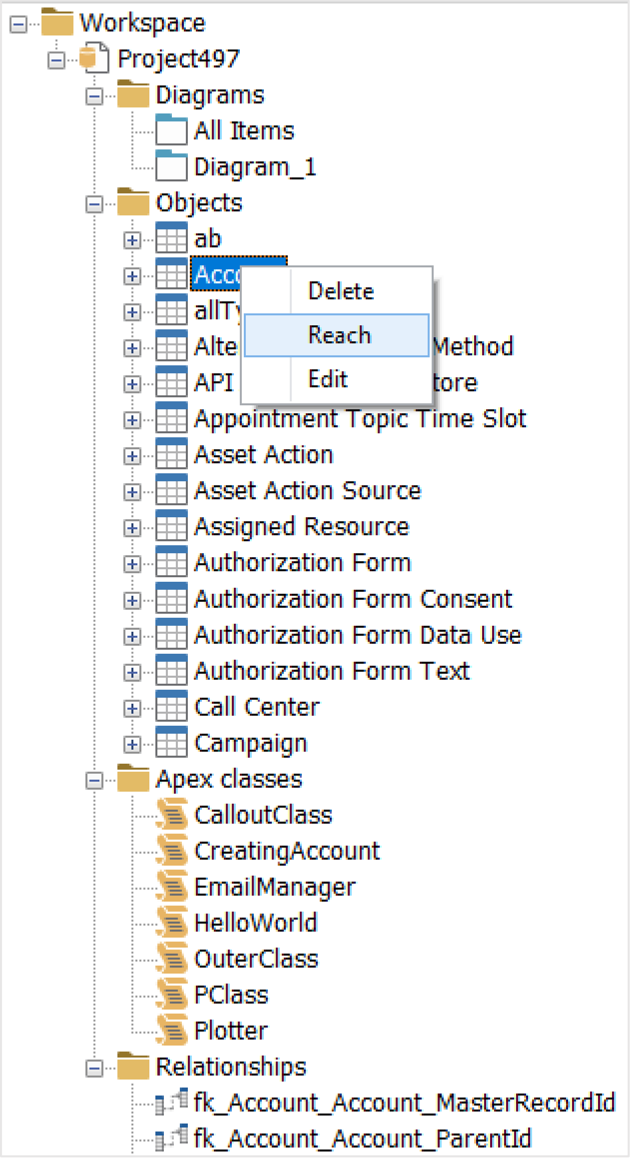
Available in: Enterprise Edition

Manipulate objects

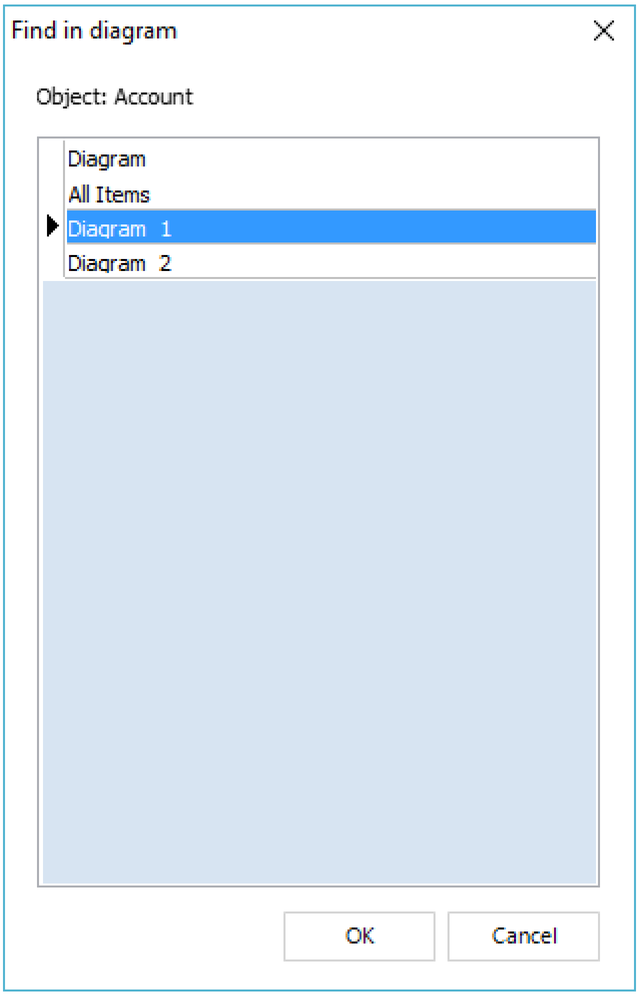
Reaching objects

To reach an object or a relationship:

1. Right-click on treeview items such as **object**, **diagram**, or **Relationship**:



If the object exists in one diagram, the object will be selected in this diagram. Otherwise, If the object exists in multiple diagrams, a list will be displayed containing all diagrams in which this object or relationship appears. You will need to select one of these diagrams to reach the object or relationship.

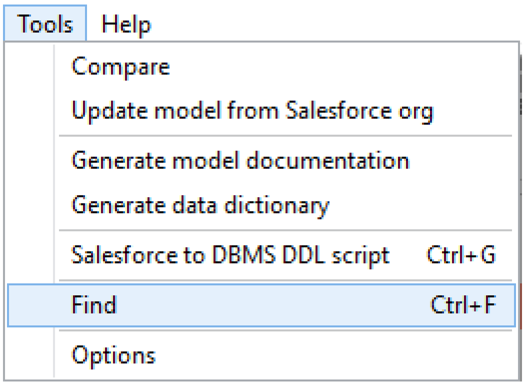


Available in: Standard, Professional and Enterprise Editions

Finding objects

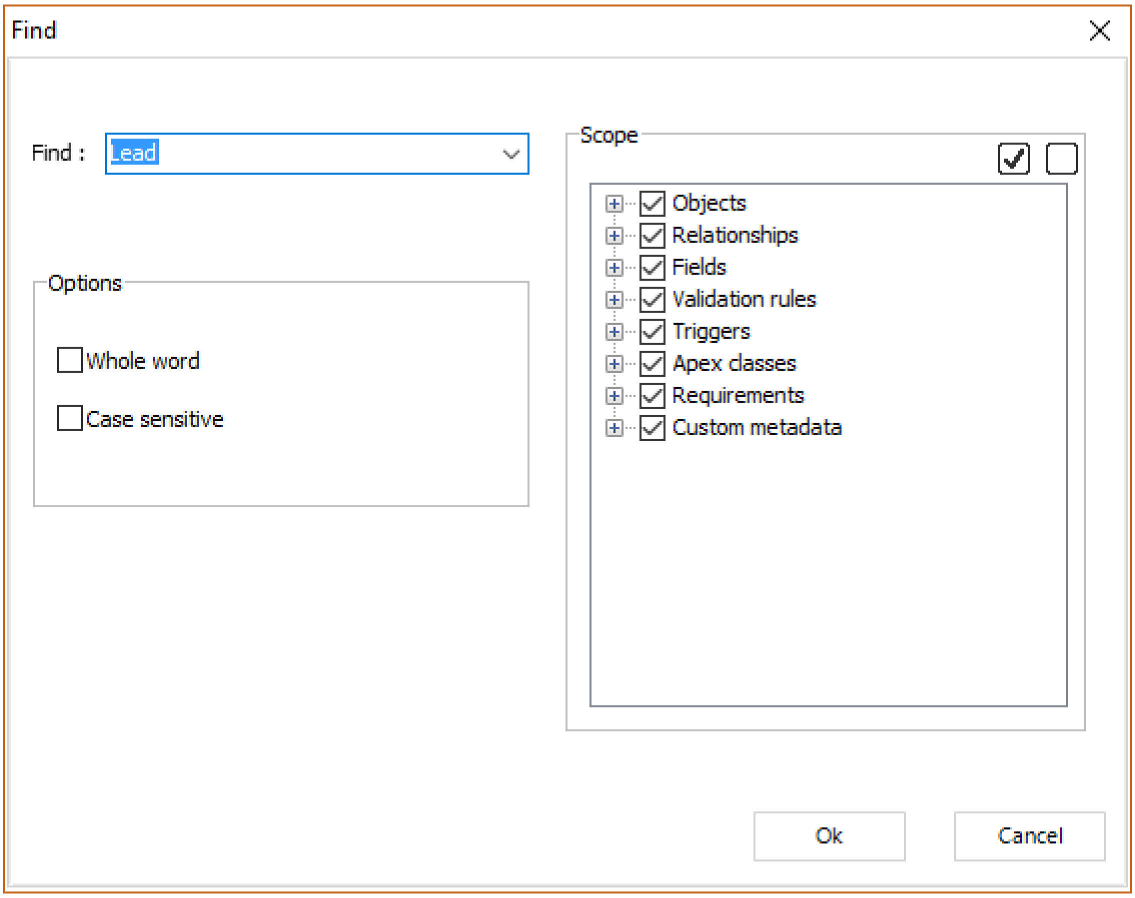
To find an object:

1. Select **"Tools | Find"** from the menu bar:

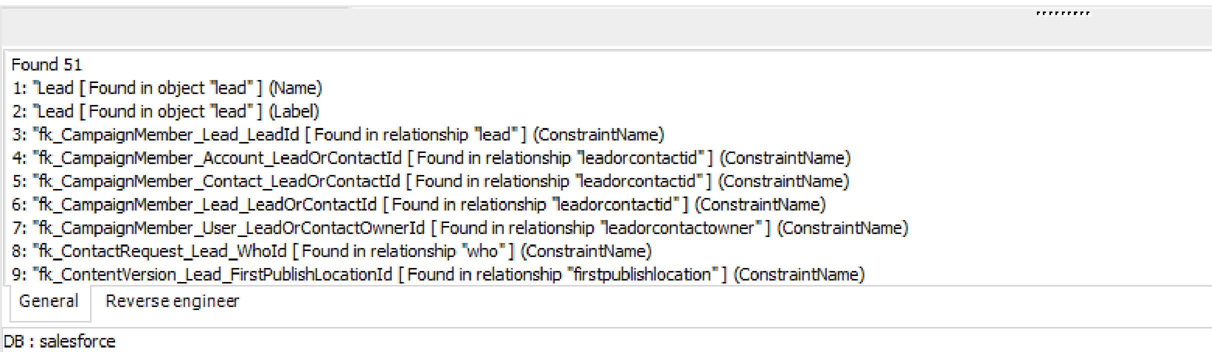


You can also use a shortcut (Ctrl+F).

2. A window will appear which contains a field to enter the word you are looking for, with the ability to choose between two options: Case sensitive or whole word. You can also select where to look for this entry.



3. When you click on “Search”, a list will appear. It contains the objects that include this word.



Available in: Standard, Professional and Enterprise Editions

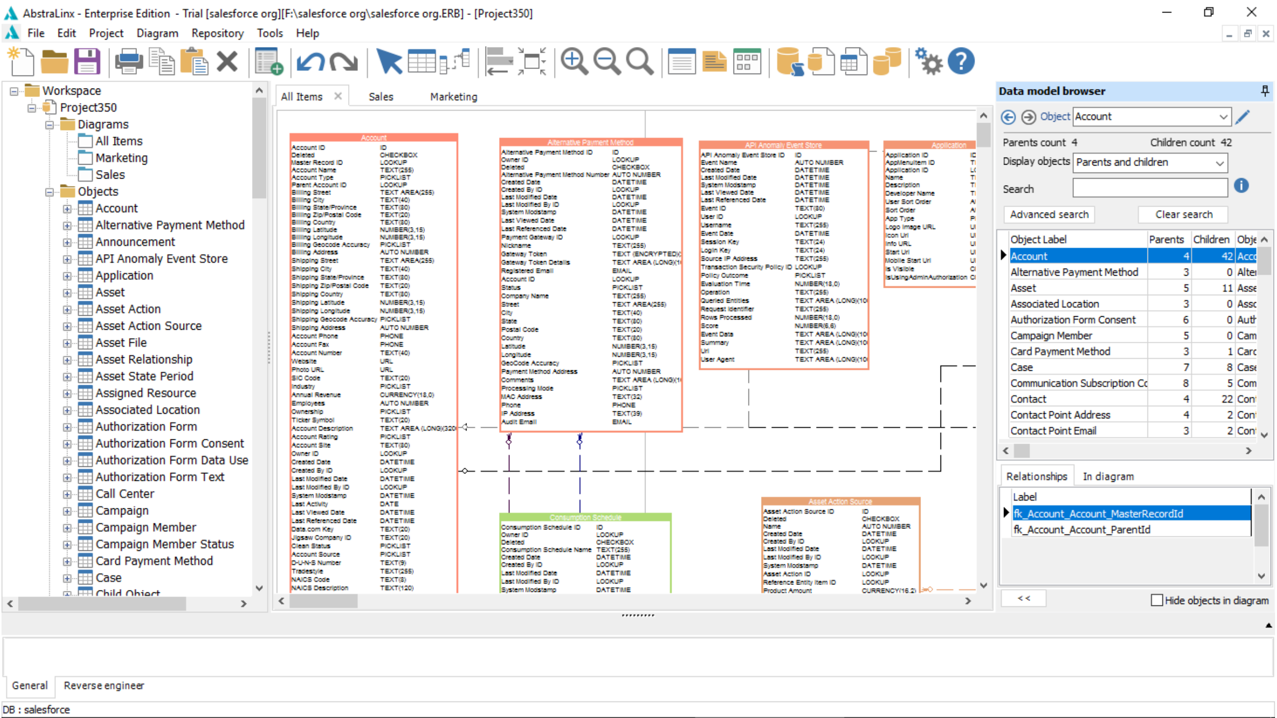
Data model browser

The main purpose of the Data model browser module is to allow a full exploration of the data structure extracted Salesforce.

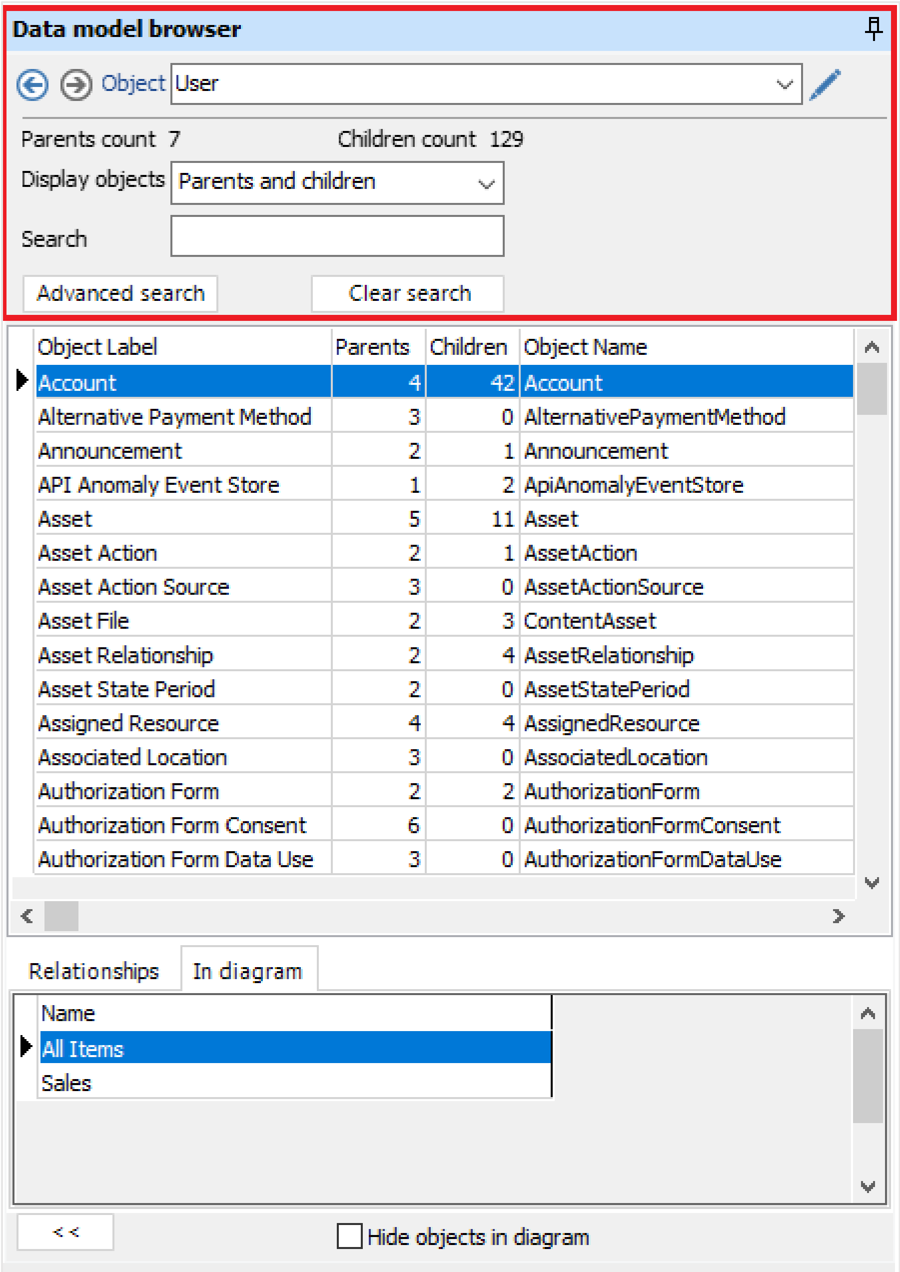
The Data Model browser form can be displayed by clicking on the “Data model browser” button on the top right of the workspace area.

By default the “Data model browser” is in floating mode, the form is displayed by hovering over the “Data model browser” button. Otherwise, you can pin the browser form on the right of the workspace by clicking the **“pin button** **“.**

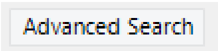
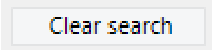
To Unpin the browser form and return to the default mode, you can use the **“unpin button** **“.**



Elements of the data model browser



	The Previous/Next buttons allow the navigation up and down on your exploration process.
Object	Search and select an object to explore.
	Open the object details form to edit the selected object.
Parents count	The number of related 'parents' objects.
Children count	The number of related 'children' objects.

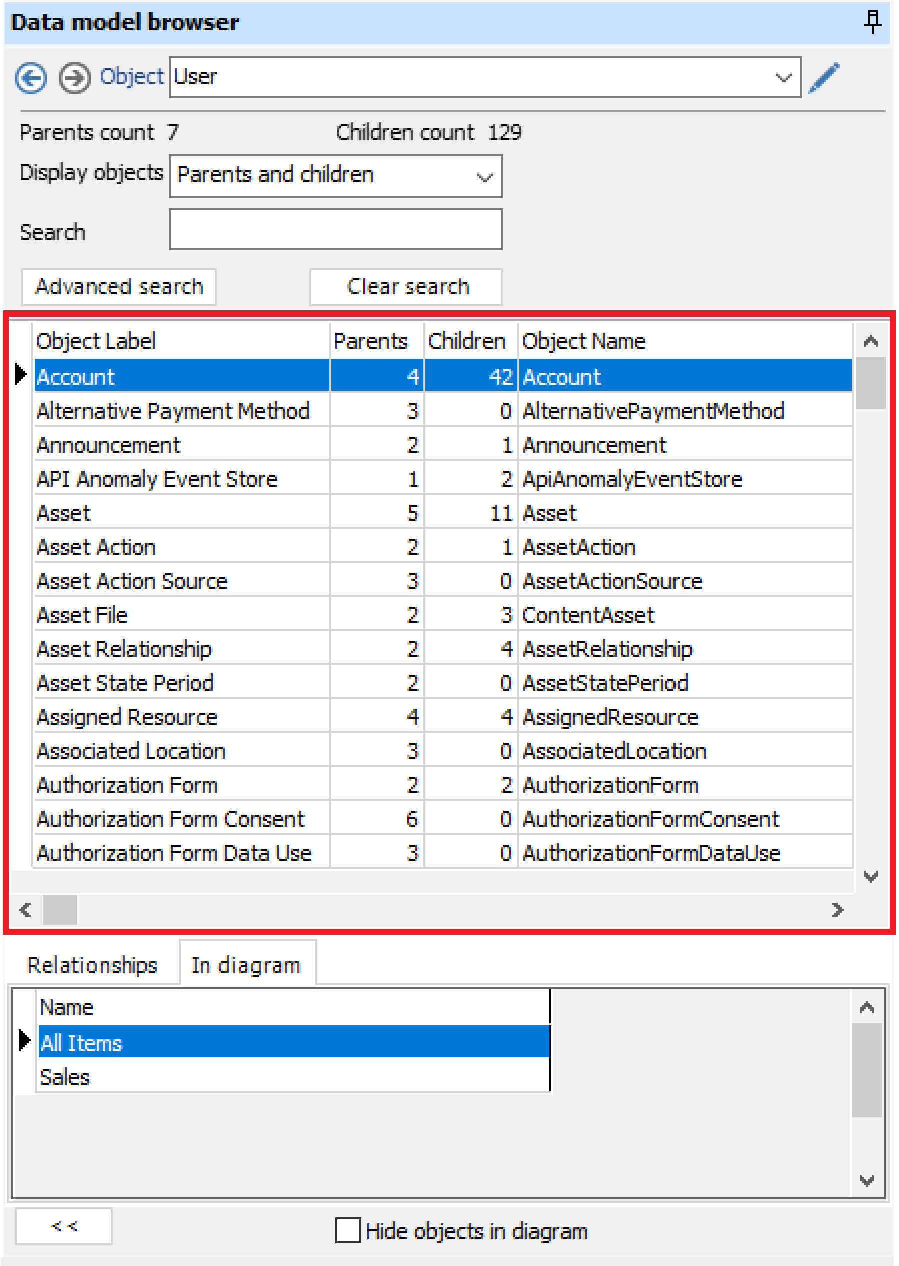
	The 'display objects' filter allows you to show in the grid all objects, parent and child, parent, or child objects.
	The search box allows you to find and select any object in the grid.
	Displays a form allowing more flexible search capabilities. Read how to use the advanced search form.
	Reset and clear all the filters entered.

The objects grid

To explore a specific object, right click on that object's name and click on "Explore". You can also open the "Object" details form by double-clicking on it.

For each object, the following information are displayed:

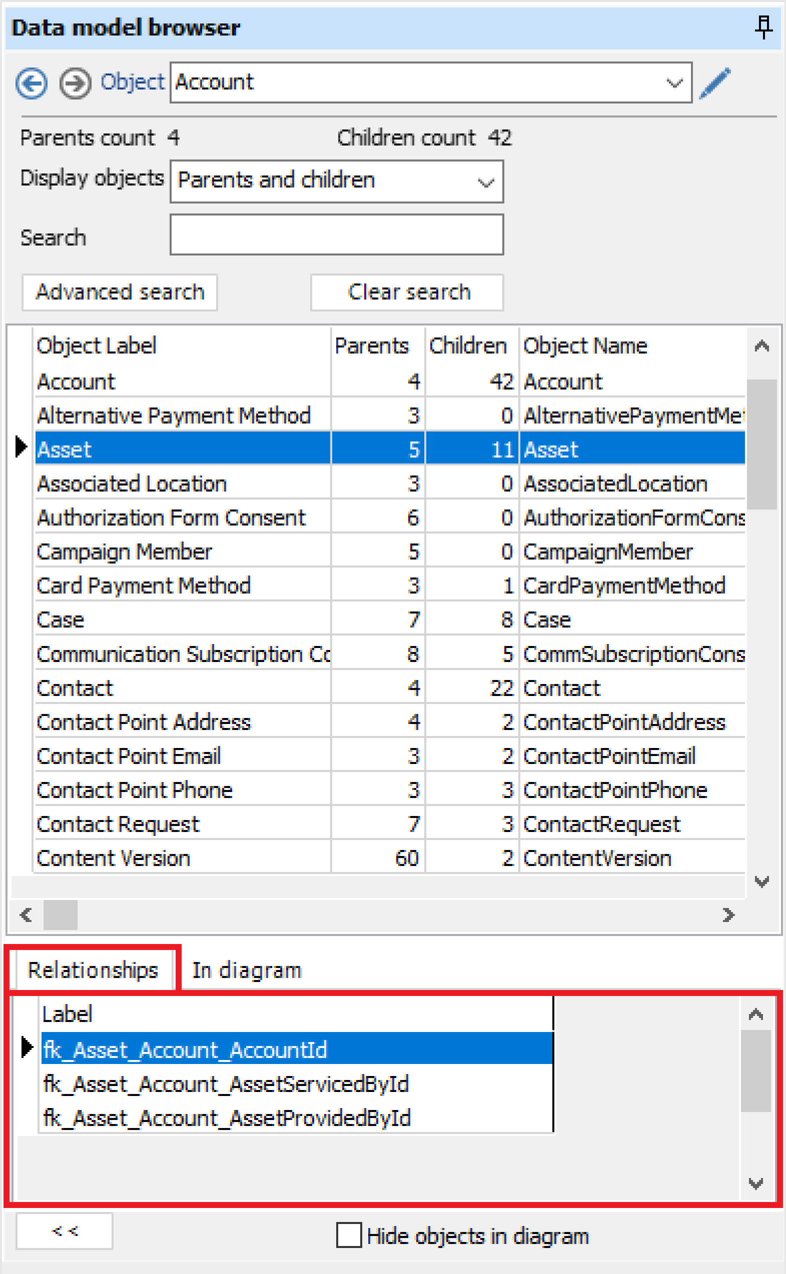
- **Object label**
- **The number of related parent objects.**
- **The number of related child objects.**
- **Object Name**
- **Comment**



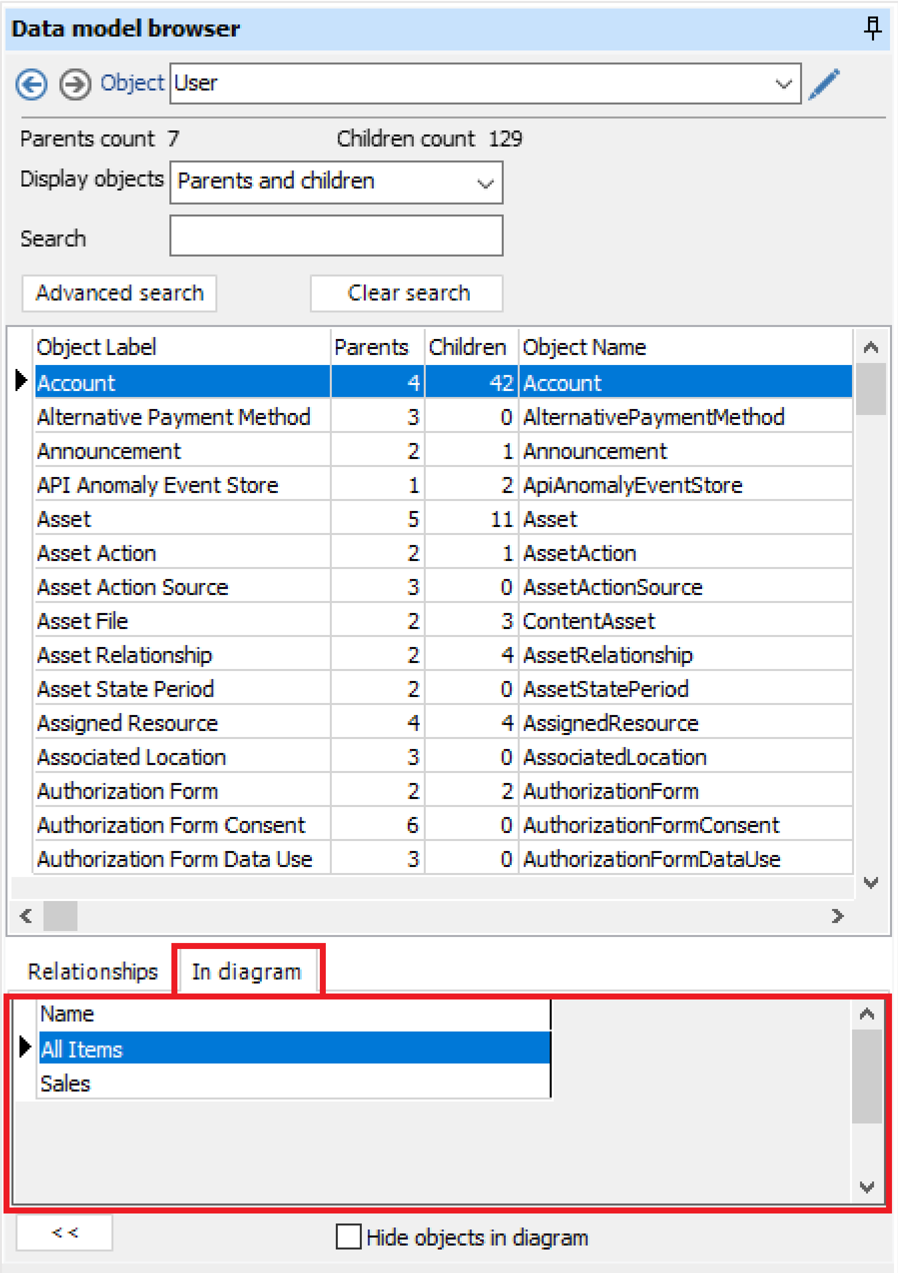
In order to build your ER diagrams interactively, it is possible to drag and drop objects and relationships from the object grid and the relationship grid to the diagram canvas.

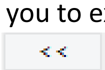
The area under the grid is made up of two tabs, which are the “Relationships” and “In diagram” tabs.

• **Relationships tab:** All the relationships between the object to explore and the selected object are displayed in this list. Double-click on the relationship name to open the “Relationship” details form.

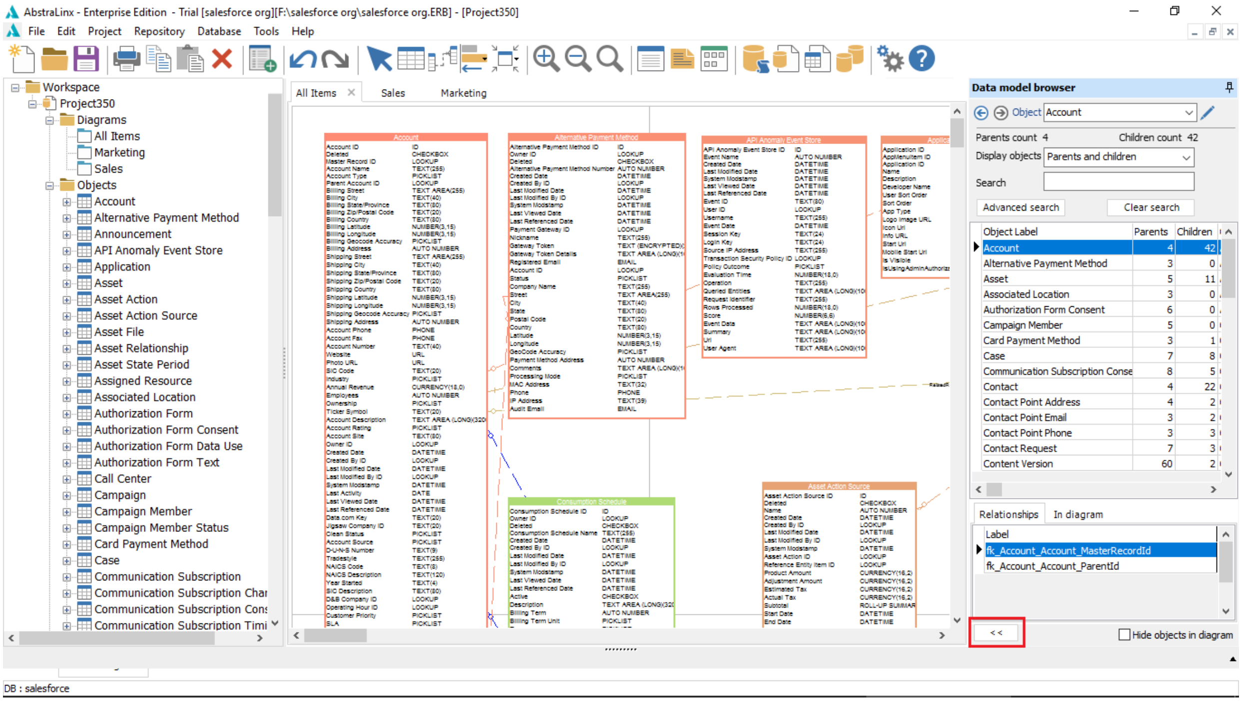


• **In diagram tab:** all the diagrams where the selected object exists are displayed in this list. Double click on the diagram's name to reach the related object on this **"diagram".**

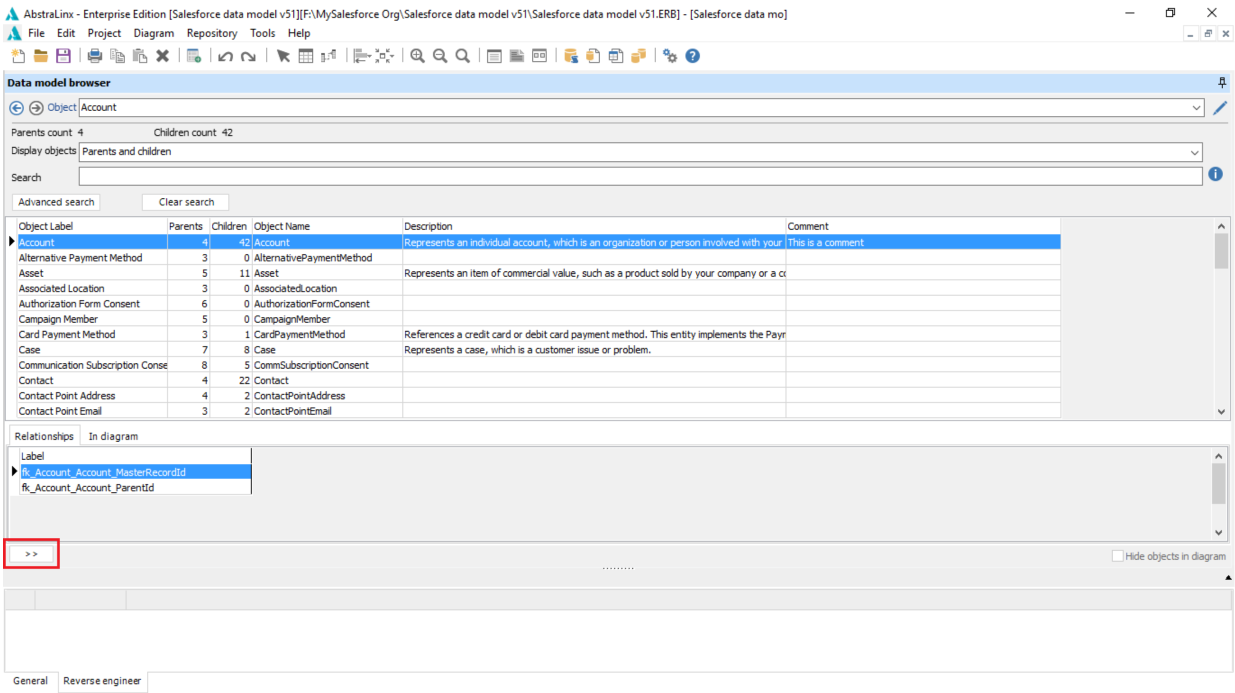


• **Expand the "data model browser" form:** AbstraLinx allows you to expand the data model browser form to take the full width of the window. To do so, click the 

expand button on the left bottom of the browser.



To reset the default display of the data browser, click on the left bottom of the browser form.



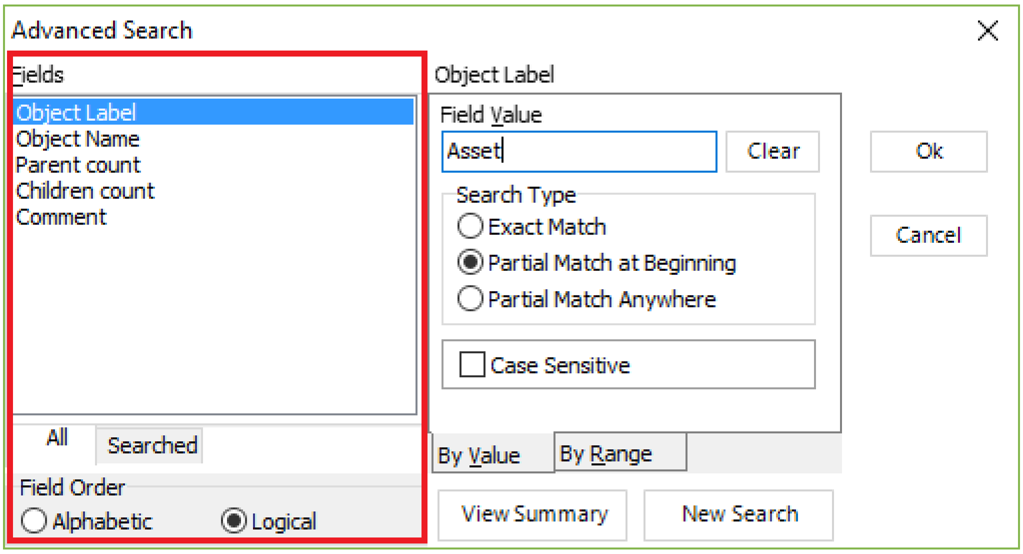
• **Hide objects in diagram:** by checking the “Hide objects in diagram” checkbox, all the objects present in the current diagram are hidden from the project grid.

Available in: Professional and Enterprise Editions

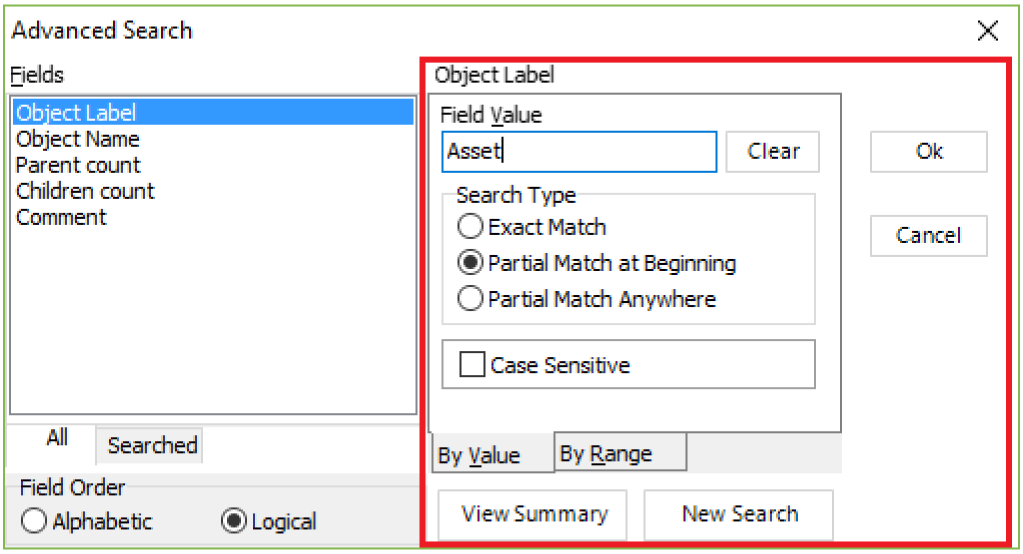
Using the advanced filters

The advanced search feature allows more flexible search capabilities. The advanced search form consists of two sections:

- The Left section includes a range of filters fields, including object label, object name, parent count, children count, and comment. This section is divided into two tabs, the **"All"** tab which contain the filter fields and the **"Searched"** tab that contain all the filters applied for this search.
- Field Order: allows you to order the fields by logical or alphabetic order.

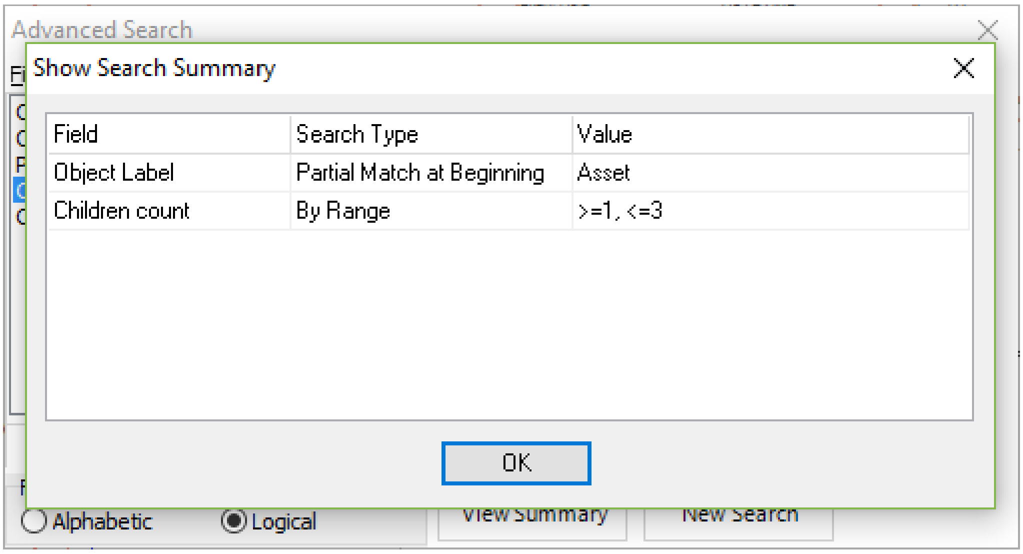


- The right section is also divided into two tabs; the **"By Value"** tab allows you to enter the field value that can be searched by exact match, partial match at beginning, or partial match anywhere. The second tab **"By Range"** allows a search by range value for the specified field in the left section.



View summary: The "view Summary" button displays a summary of the filters applied to a search.

New search: The “New Search” button allows you to reset and clear all the filters entered.

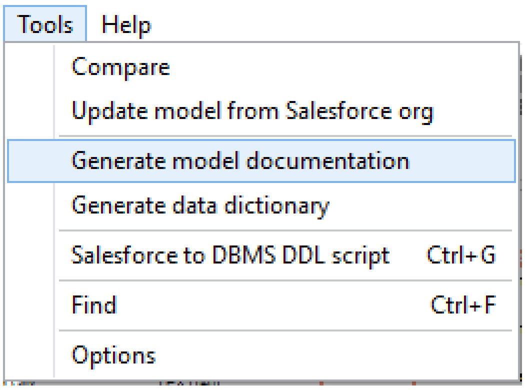


Available in: Professional and Enterprise Editions

Model documentation

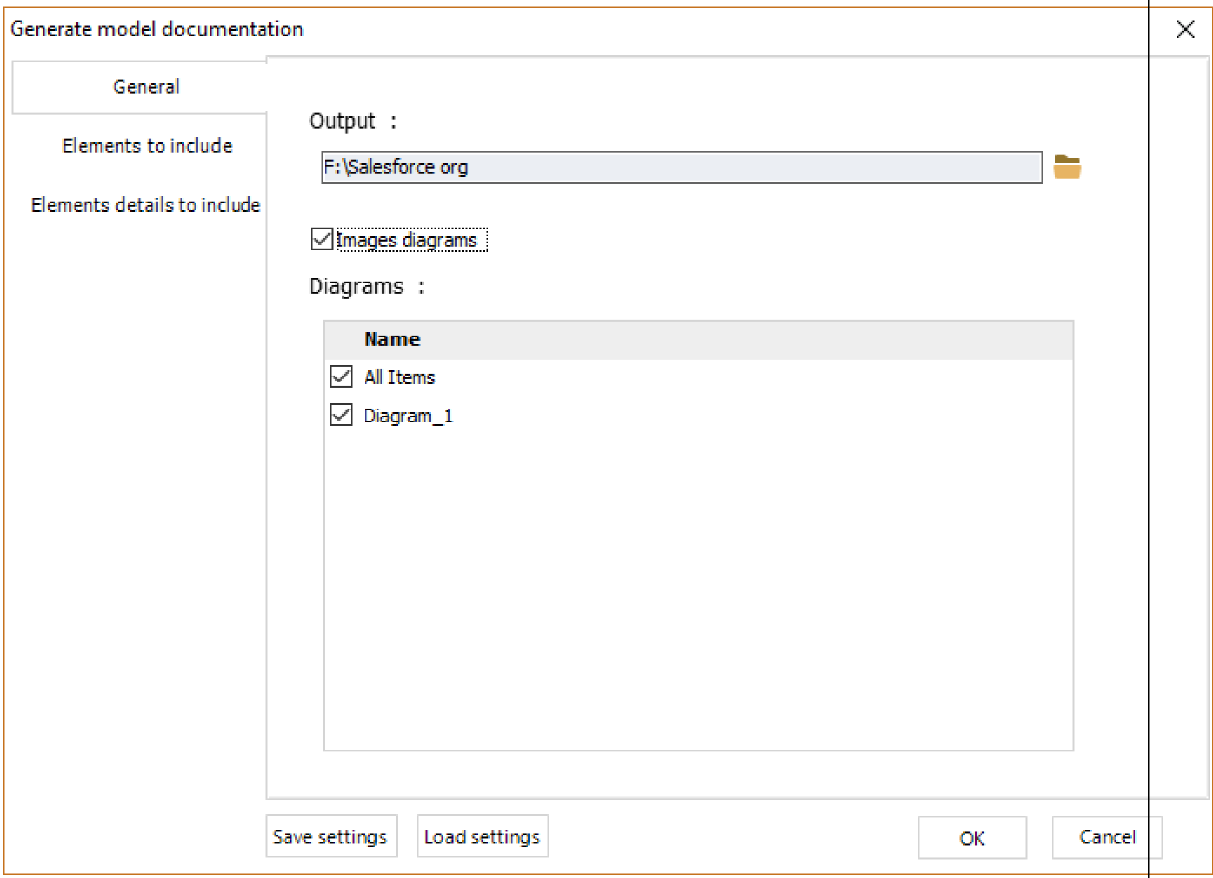
To generate Model Documentation:

1. Select **“Tools | Generate model documentation”** on the menu bar:

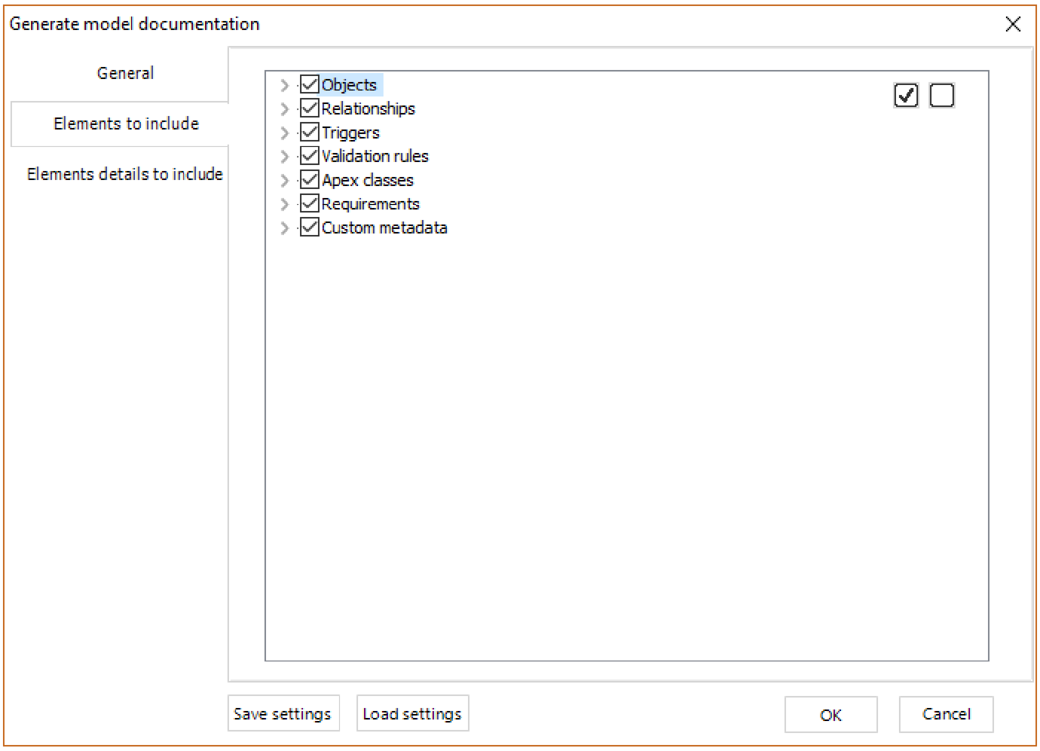


2. A setting window will appear, containing three tabs:
    - **General**:
        - Select a directory to save the model documentation.
        - You can check the Images Diagram to embed the diagram model image into the model documentation.

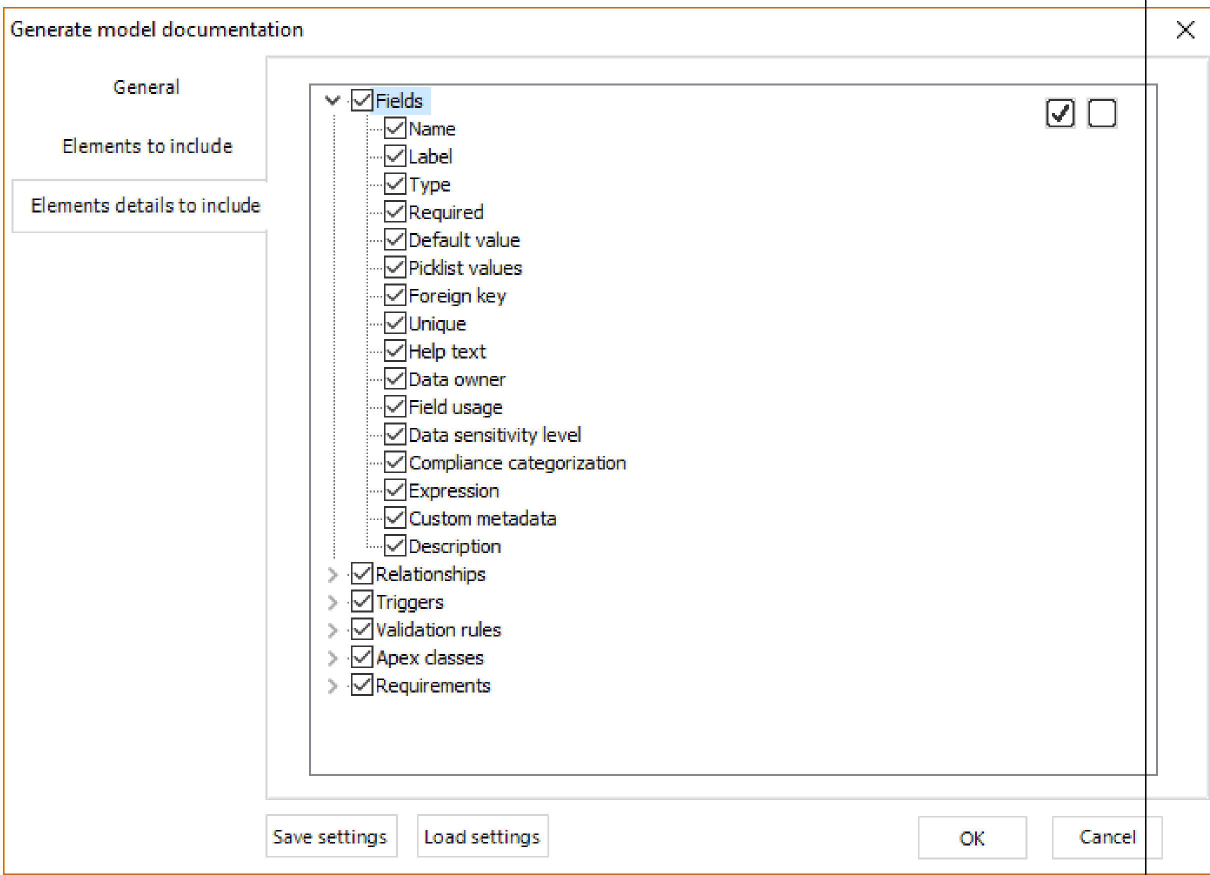
- Select which diagrams you want to include in the generated documentation



- **Elements to include:** Check and select the elements you want to include in your documentation report.



- **Elements details to include:** In this tab, select the details for each element that you included in your documentation report.



- You can check all elements of the treeview with the checkbox in the top right:

- You can uncheck all elements of the treeview with the checkbox in the top right:

- You can save the settings to reuse them later in another project.

  To save settings:

  1. Click on the **"Save Settings"** button, and name your settings file (*.CFG)

  To load previously saved settings:

  1. Click on the **"Load Settings"** button, browse to your file (*.CFG) and open it.

Available in: Standard, Professional and Enterprise Editions

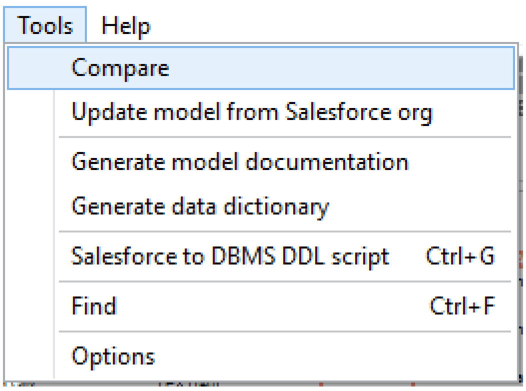
Compare models and/or Salesforce orgs

Using the comparison feature of AbstraLinx, you can compare your Salesforce data model with another Salesforce organization, any two Salesforce data models or two Salesforce organizations.

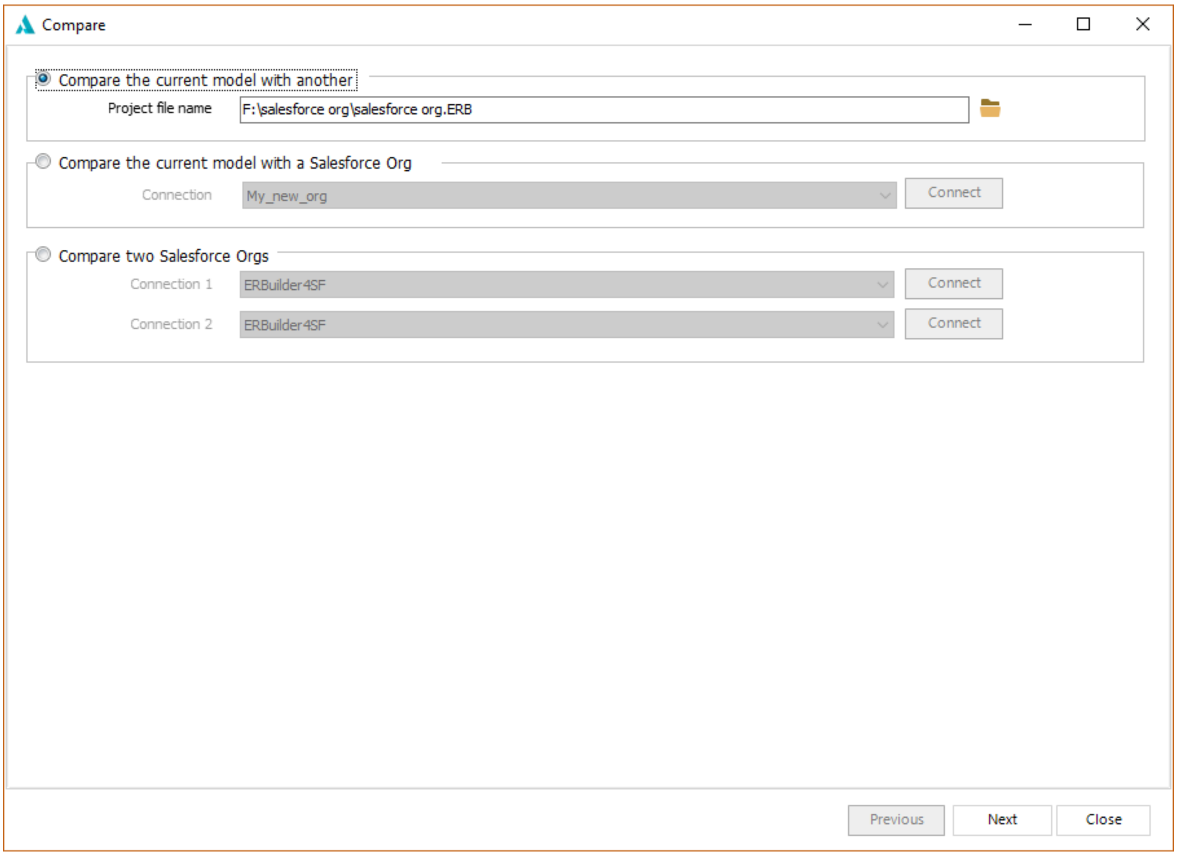
Model/Model comparison

To compare two Salesforce data models, follow these steps:

1. On the main menu, navigate to "**Tools | Compare**".



2. In the **"Compare"** window, you must now select the target data model. Click the Browse button and load the data model file you want to compare with **(The file extension should be ".ABLX" or ".ERB" for the older projects)**.
   Note: The source model is the opened project.



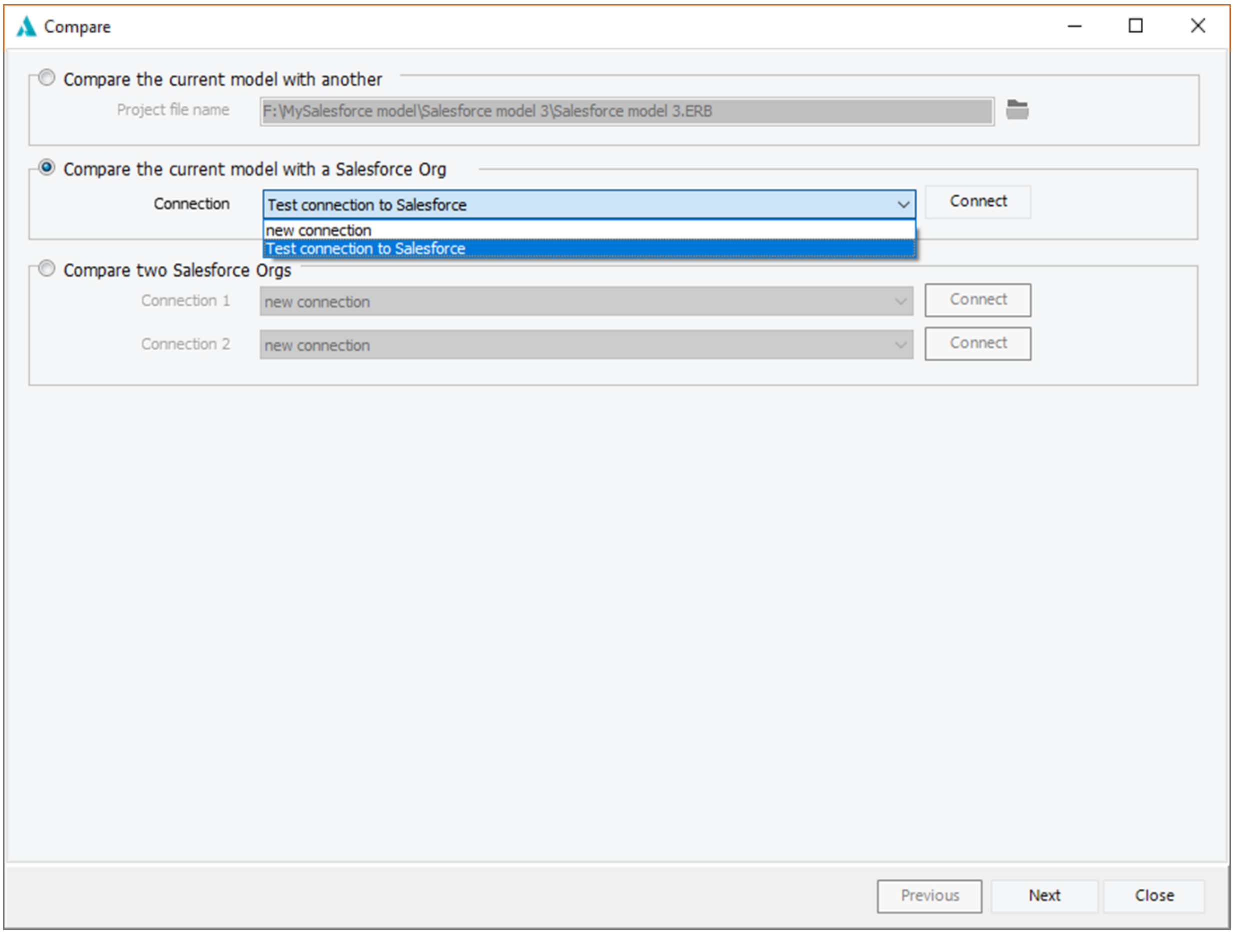
Available in: Standard, Professional and Enterprise Editions

Model/Salesforce org comparison

To compare an opened model with a Salesforce org, follow these steps:

1. On the main menu, navigate to **"Tools | Compare".**
2. Select a connection to your organization, and click **"Connect"**.

Note: The connection to the database must be created and configured from **"File | Manage Connections"**. See the section "Connections Management".



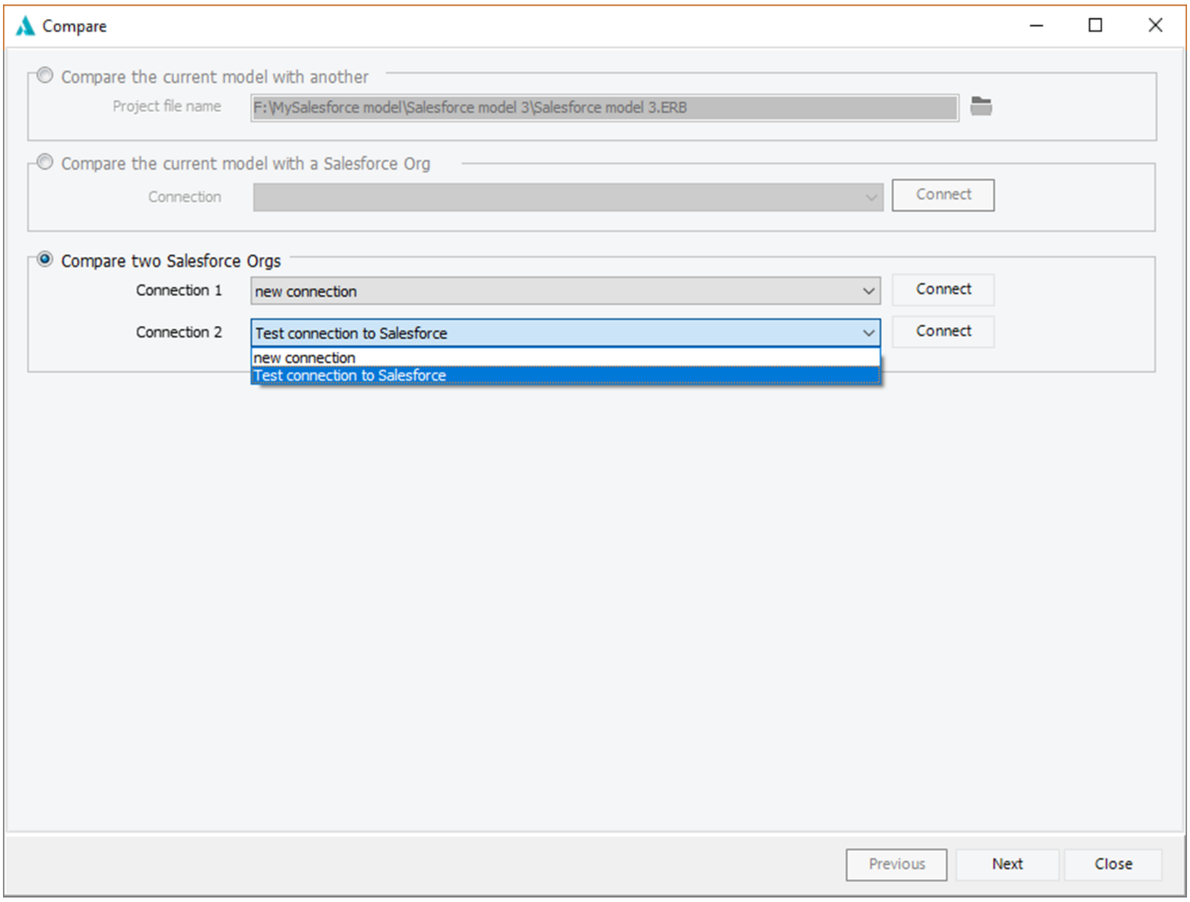
Available in: Standard, Professional and Enterprise Editions

Two Salesforce org comparison

To compare two Salesforce organizations, follow these steps:

1. On the main menu, navigate to **"Tools | Compare".**
2. Select the source and the target organization to compare.

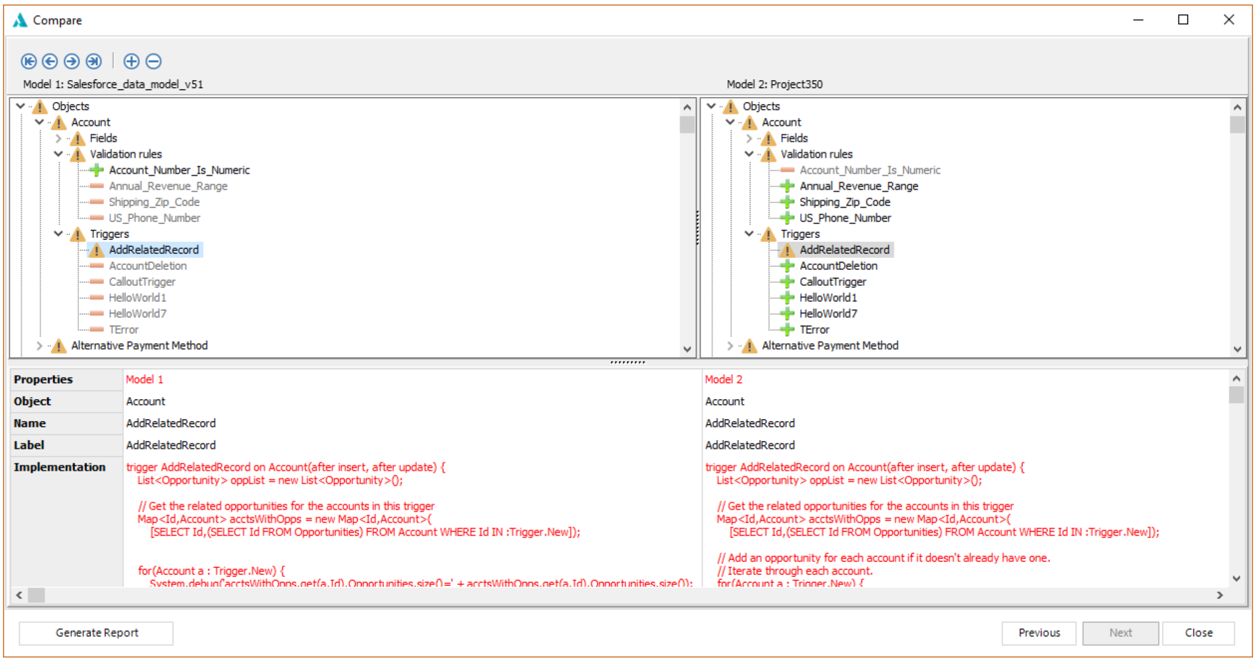
Note: To compare two orgs you must save and close the opened project before performing the comparison process.



Available in: Standard, Professional and Enterprise Editions

Comparison results

Once you have defined both sides of the comparison, click on the **"Next"** button to start the comparison process. When the comparison is complete, the differences will appear in the result window grouped by objects.



In the result window, the objects that are the same are marked with an equal icon **=** .

The objects that are different are marked with a warning icon ⚠. The difference will be displayed in red.

➕ The "plus" icon indicates that an object exists in one project and not in the other.

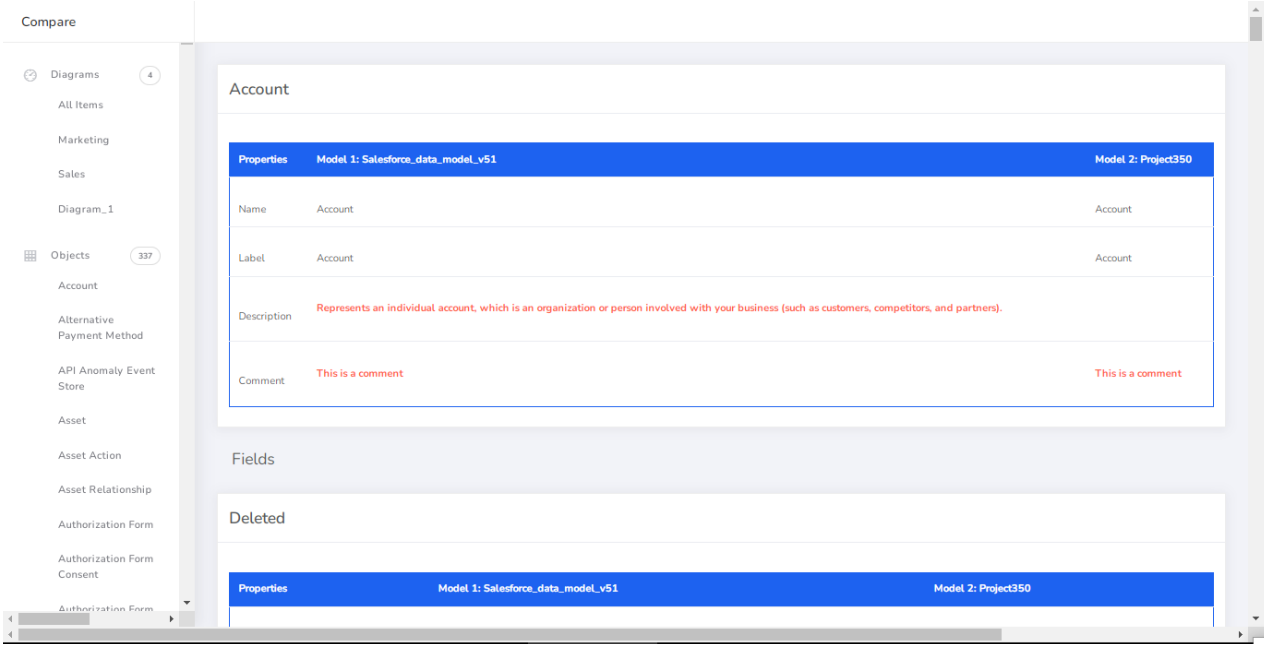
➖ The "minus" icon indicates that an object does not exist in one project and exists in the other.

The table under the comparison tree shows more details about the selected object and shows the found differences of the selected object between the two compared projects.

Available in: Standard, Professional and Enterprise Editions

Comparison HTML report

You can generate an HTML comparison report by clicking the button **“Generate Report”**.



Available in: Standard, Professional and Enterprise Editions

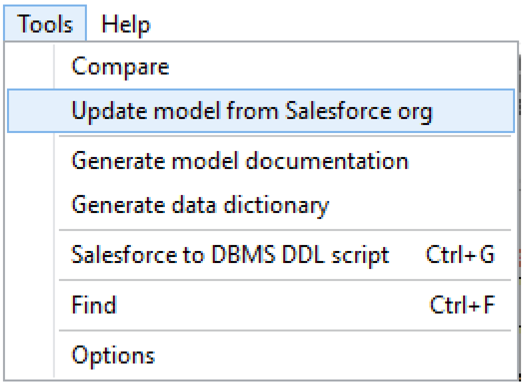
Update model from Salesforce org

Update model from database wizard allows updating model from Salesforce organization in a fast and convenient way.

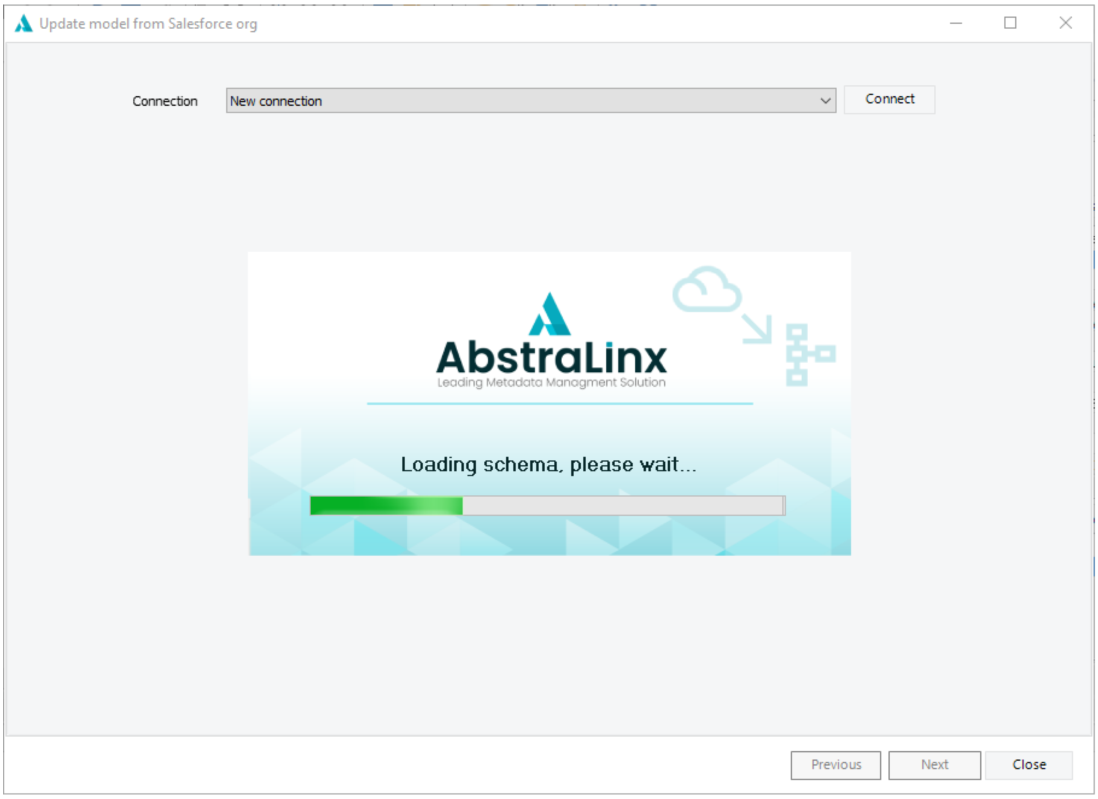
The wizard detects all the database changes that can affect the Salesforce data model, e.g. created and modified objects and their fields, keys, triggers, apex classes and validation rules, etc.

To update model from Salesforce org, perform the following steps.

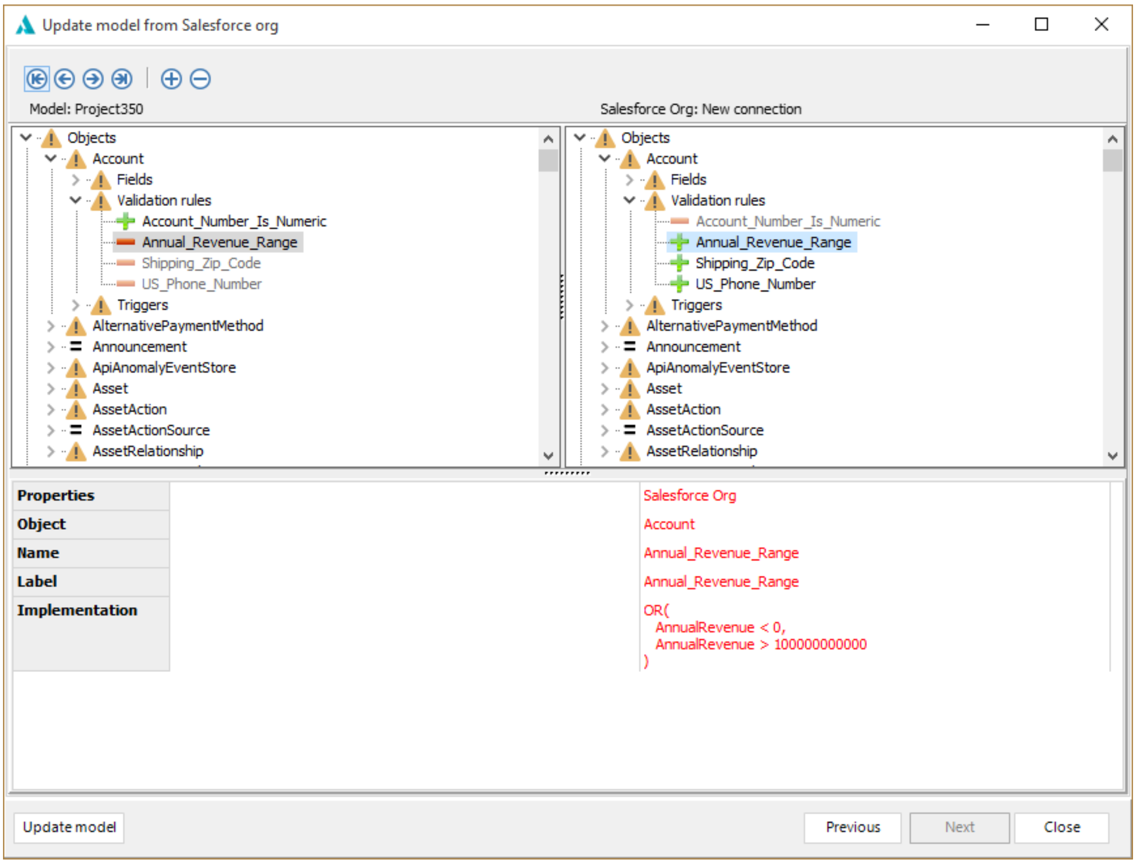
- Select **“Update model from Salesforce org”** from the menu **“Tools”**. The first window of the “Update model from database” wizard is displayed.



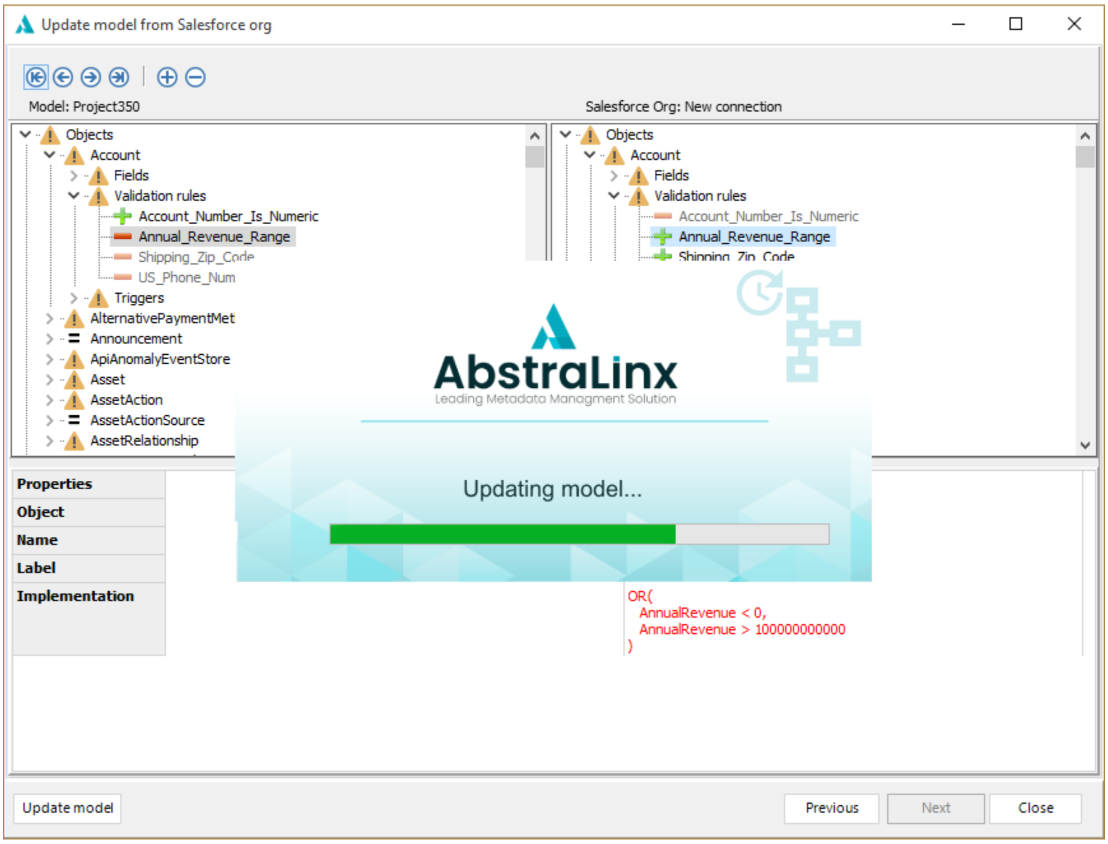
- Select a connection to your Salesforce org and connect it by clicking the **"connect"** button, then click **"Next".** The wizard will load the schema from Salesforce org and compare it with the current schema.



- When the comparison is finished, the differences will appear in the result window grouped by object.



- Once you are ready, click **"Update Model"** to commit the changes to your data model.

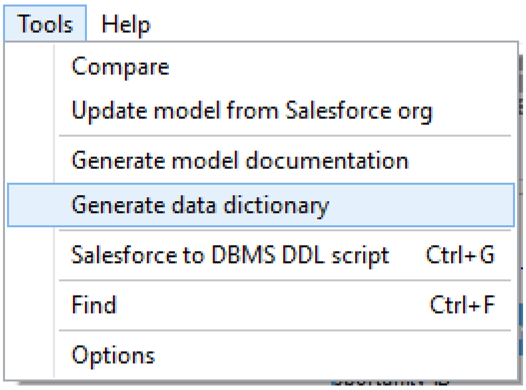


Available in: Professional and Enterprise Editions

Generate data dictionary

To generate a Data dictionary

1. Select "**Tools | Generate data dictionary**" from the tools menu.



2. Select the following options as needed and then click OK.

- **Output**

  Select a Directory to save the data dictionary.

- **Export type**

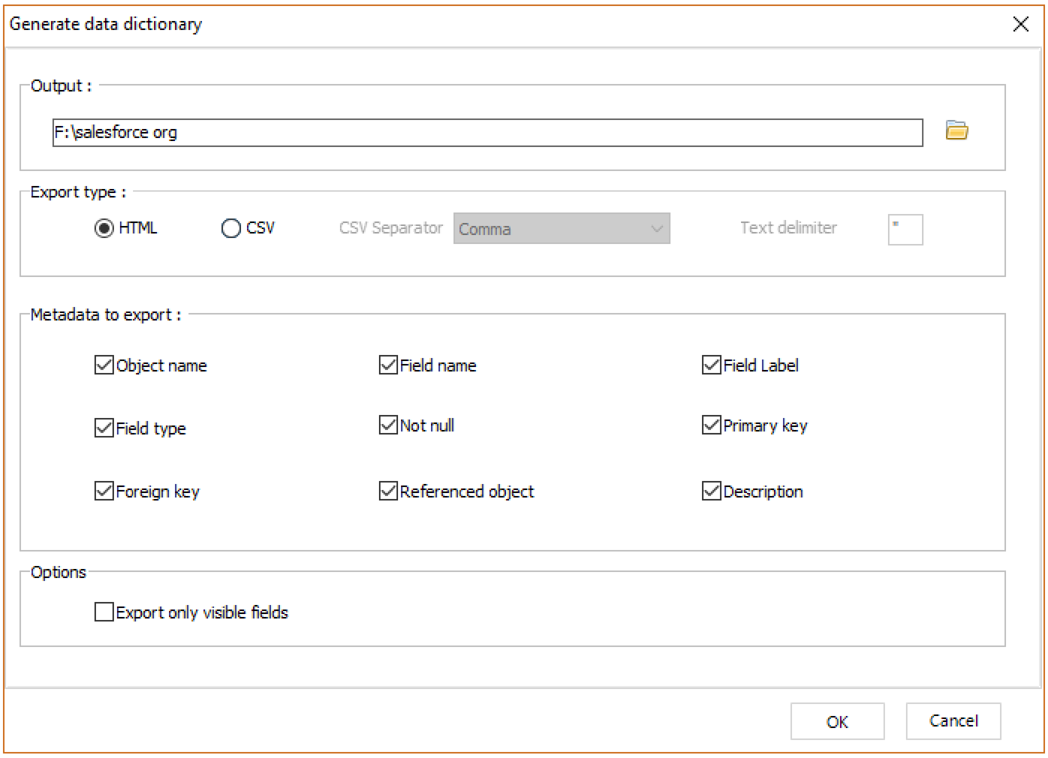
  Specify the format of the generated data dictionary document. Available format are HTML and CSV.

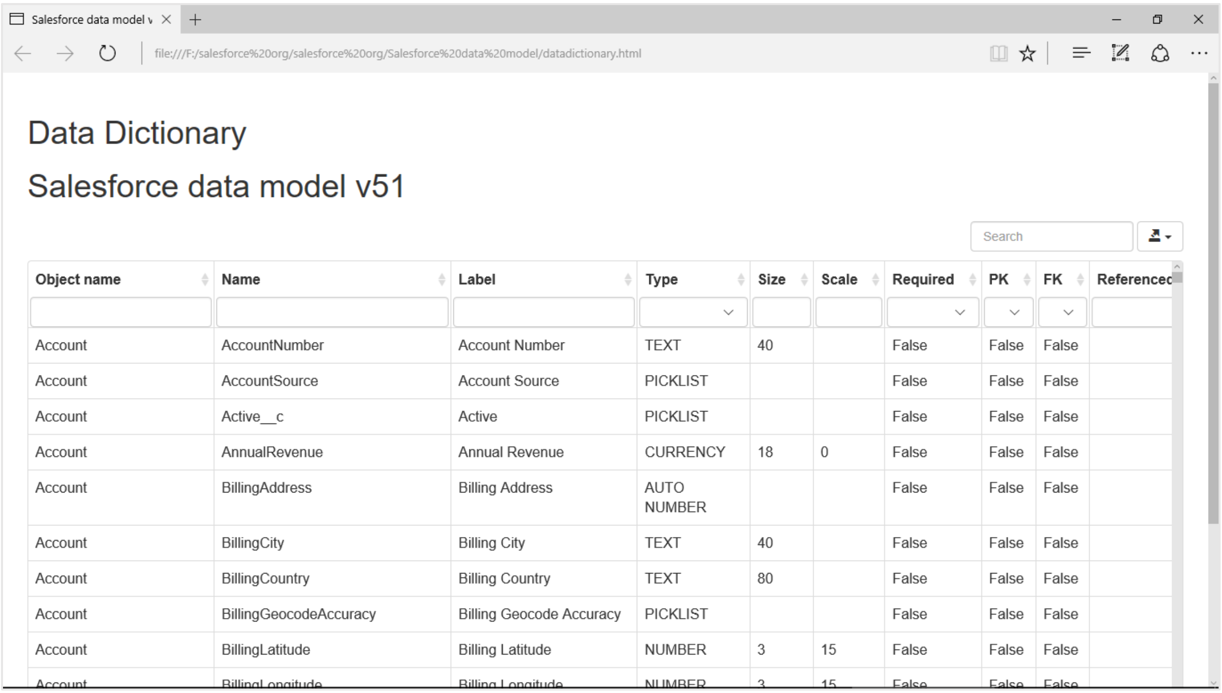
- **Metadata to export**

  Specify the fields to export.

- **Options**

  If you want to export only the visible fields in your data dictionary, check the checkbox in the options section.





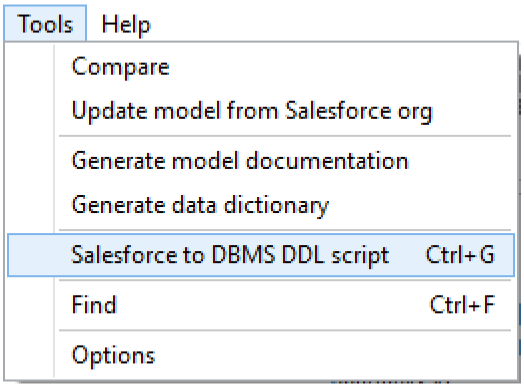
It is possible to search and filter in the generated data dictionary. It is also possible to export the document in XML, JSON, CSV, SQL, TXT, and MS-EXCEL format.

Available in: Professional and Enterprise Editions.

Convert from Salesforce to target DBMS

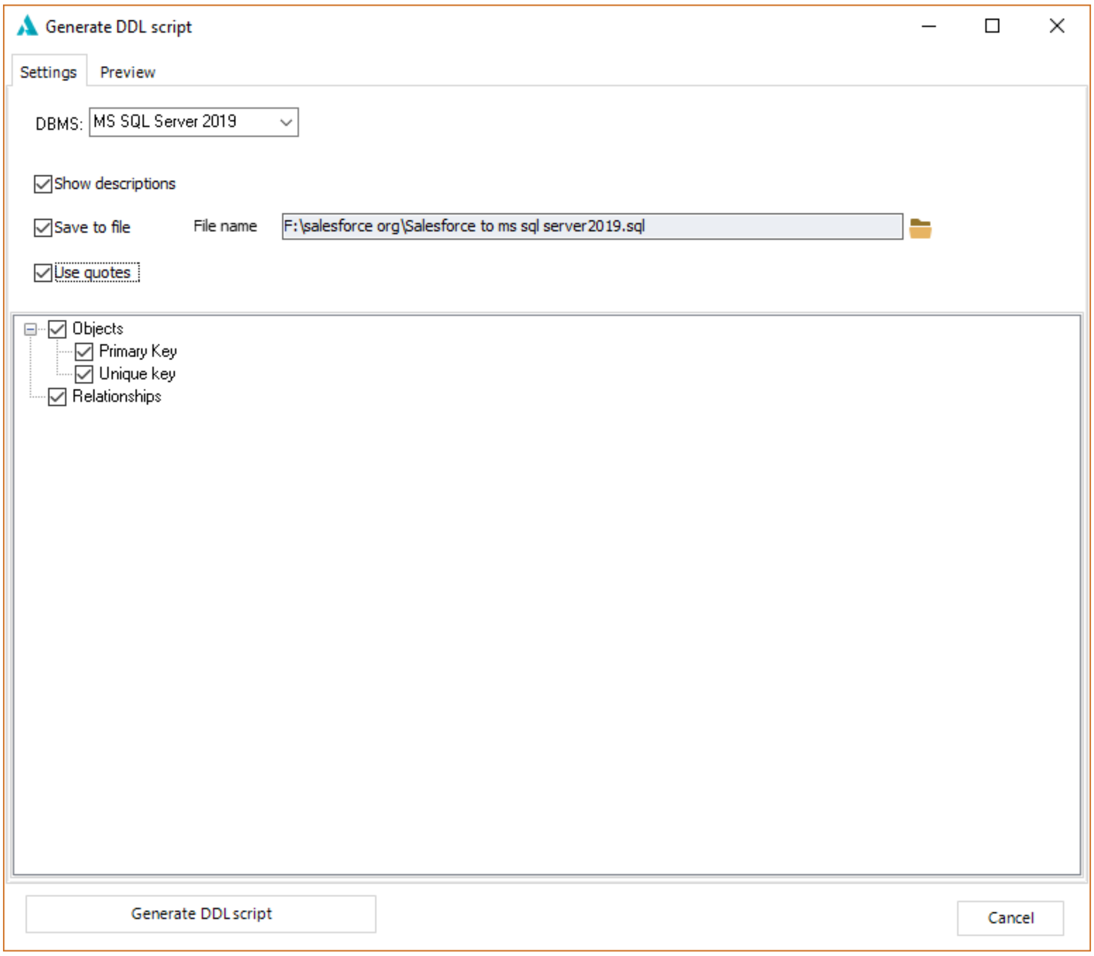
The following sections describe how to convert your Salesforce organization to other target DBMS and generate DDL scripts using AbstraLinx.

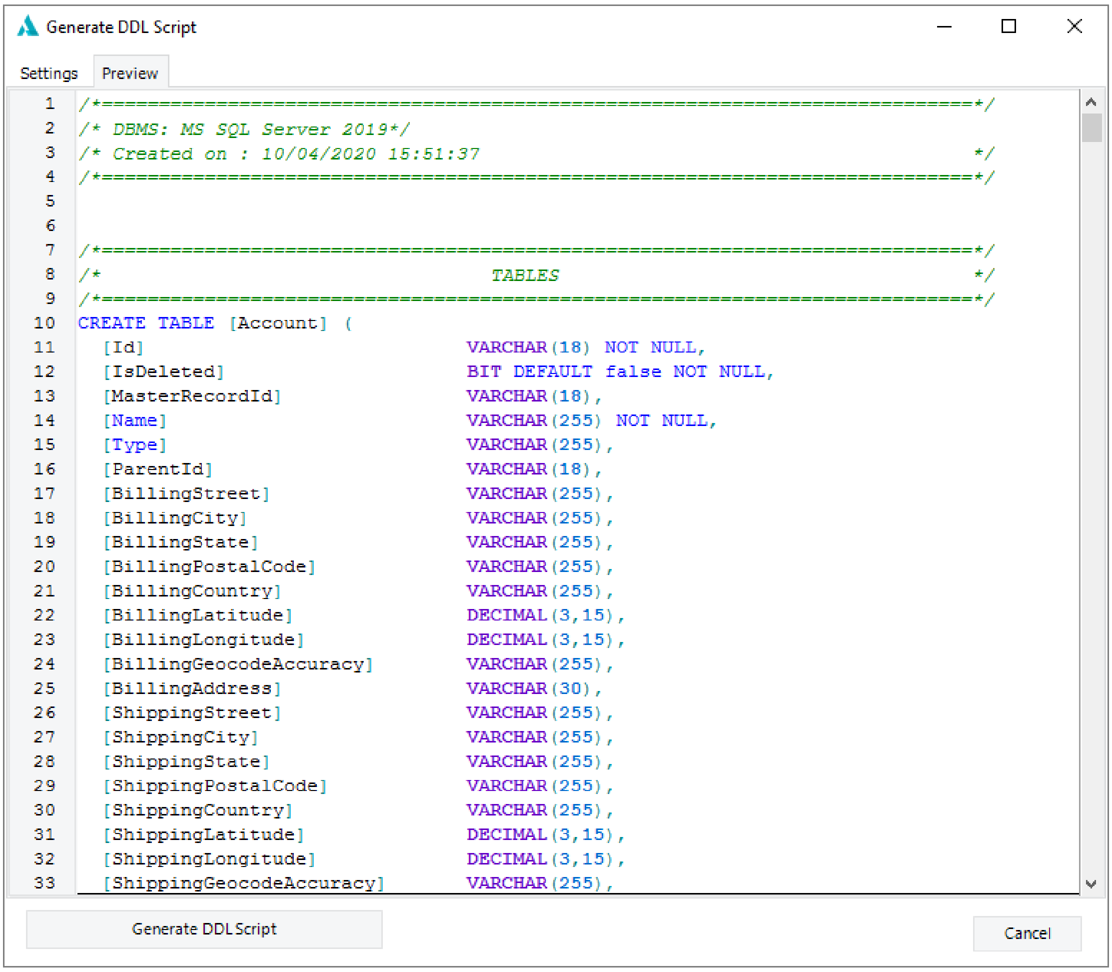
1. To convert an opened Salesforce project, navigate to “**Database | Salesforce to DBMS DDL script**”. Alternatively, use the shortcut “CTRL+G”.



2. In the opened window, select the target DBMS and set up other settings then click on “Generate DDL Script”

   Check the “Save to file” checkbox and enter the directory Path and file Name if you want to generate an SQL file. Otherwise, you can preview the script generated on the preview tab.


Generate DDL script
Settings
Preview
DBMS:
MS SQL Server 2019
Show descriptions
Save to file
File name
F:\salesforce org\Salesforce to ms sql server2019.sql
Use quotes
Objects
Primary Key
Unique key
Relationships
Generate DDL script
Cancel



Available in: Professional and Enterprise Edition

Git version control

The Git version control is a feature that enables you to work with Git for storing and sharing versioned data models. It provides a robust and easy way for collaboration and team working during the modeling process.

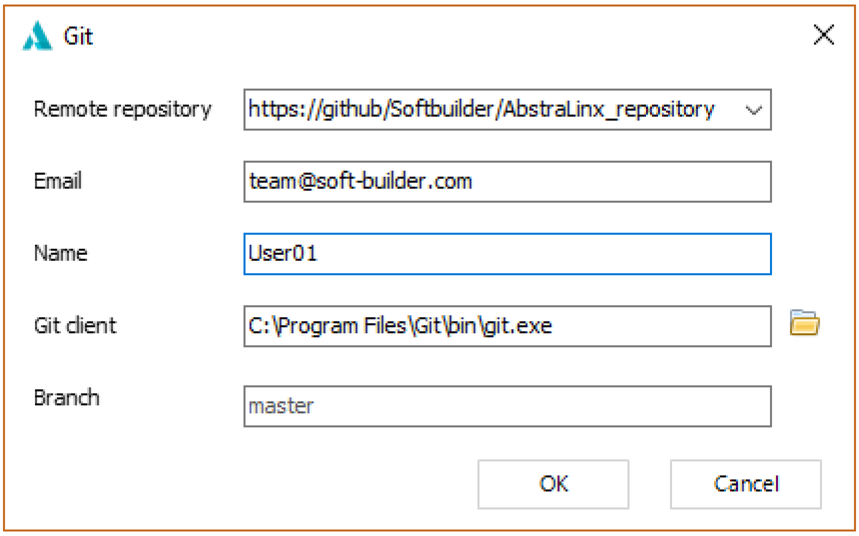
Setup of Git with AbstraLinx

Before you start setting up a connection between AbstraLinx and Git, you need to:

- Install Git on your computer;
- Have an account on Git;
- Create a working repository and grant access to all the collaborators on your project.

To set-up a connection with your repository on Git, open AbstraLinx then navigate to **“Repository | Manage repository”** and fill in the following information:

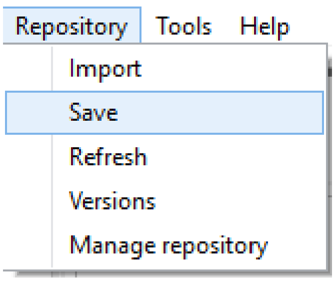
- Remote repository: set path to your Git repository. To get the remote repository path, log in your Git account then navigate to the repository. Go to the **“Code”** dropdown button and open it, then copy the Https path.
- Email: fill in your email
- Name: fill in the Git user name
- Git client: set path to your Git client
- Branch: if you use the default branch “Master” leave this field empty. Otherwise, if you are using another branch, mention it here.



Click **“OK”** then specify an **empty directory** on your computer to save your project.

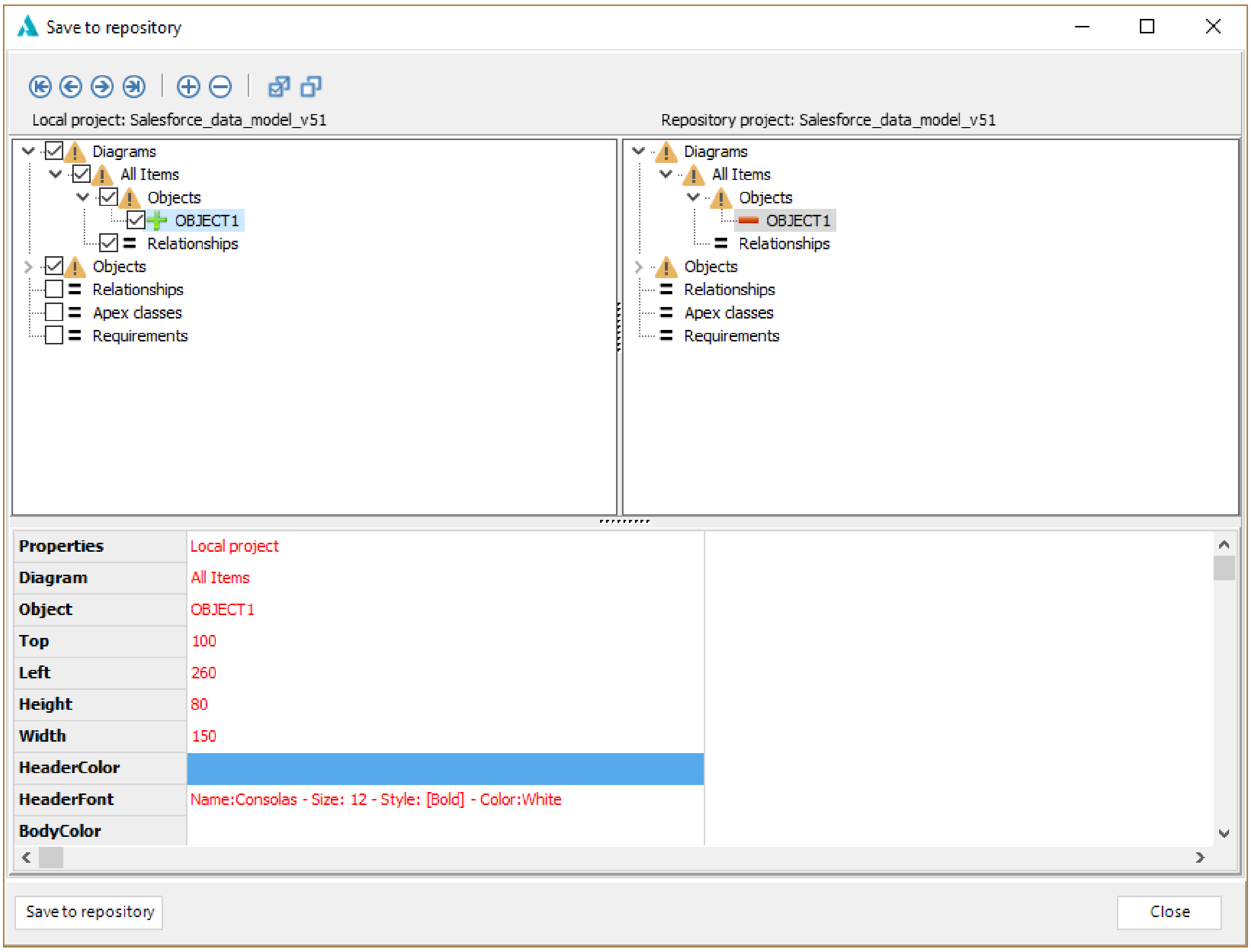
Save changes to Git repository

To commit and push changes to Git repository, go to **“Repository | Save”**.

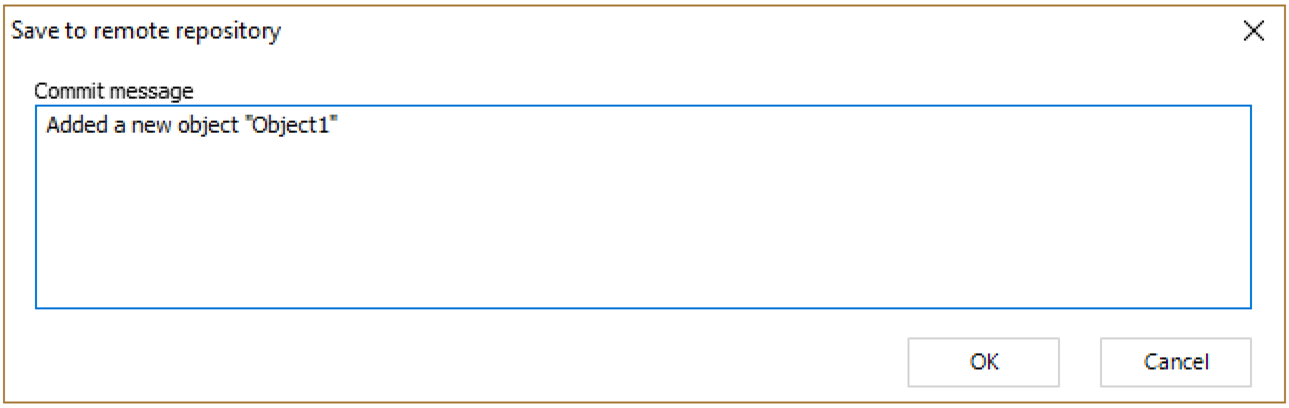


AbstraLinx will compare and display the differences between the current version of your data model and the remote version.

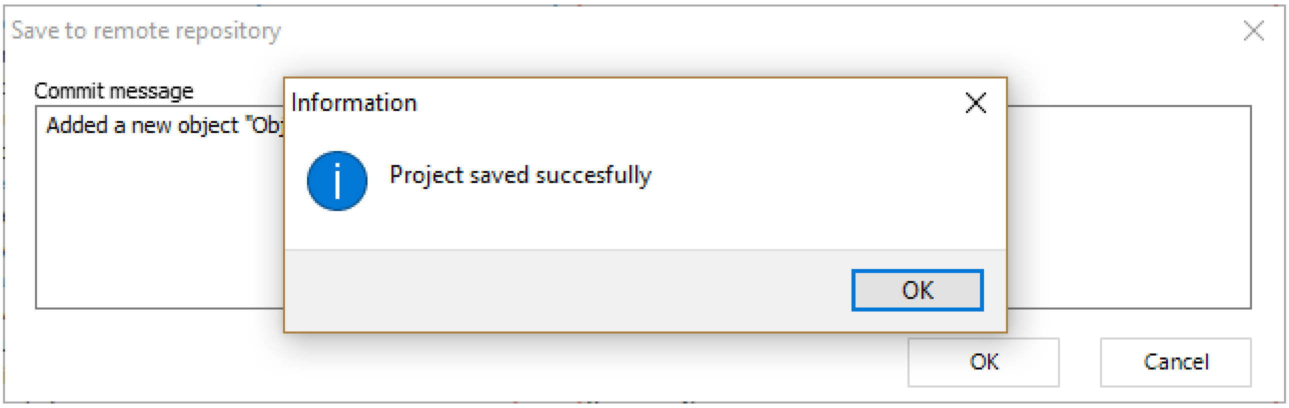
In the merge window, you can save all the modification that you made into the remote repository by selecting the appropriate changes then clicking **“Save to repository”.**



Once you click **"Save to repository"**, a window will appear in which you have to enter a commit message for this version of your model.



After entering the appropriate commit message, click **"OK"** to commit the saving operation. AbstraLinx will display a message on successful saving operation; otherwise, an error message will be displayed with the error encountered.

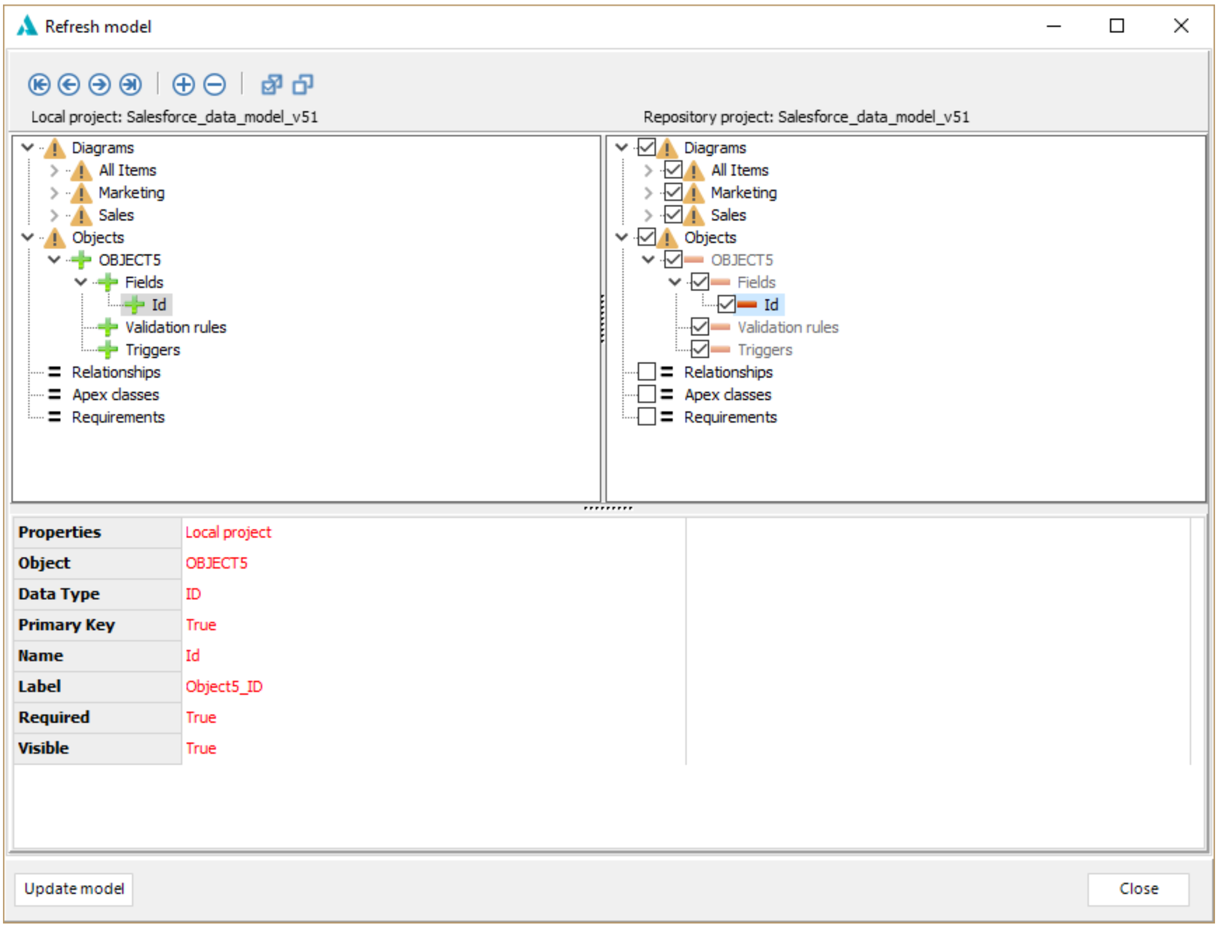


Available in: Enterprise Edition.

Refresh model

The refresh feature allows you to update your local data model with the last changes made by other collaborators.

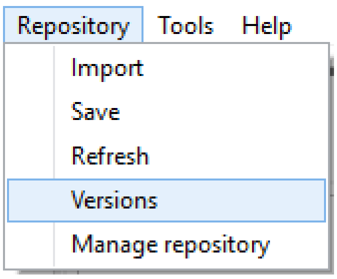
To refresh your model, go to **"Repository | Refresh"** from the main menu. AbstraLinx will display the merge window with the differences between your local model and the last saved version. To refresh your local model and merge it with the remote model, check the changes you want to add to your local model then click on **"Update model".**



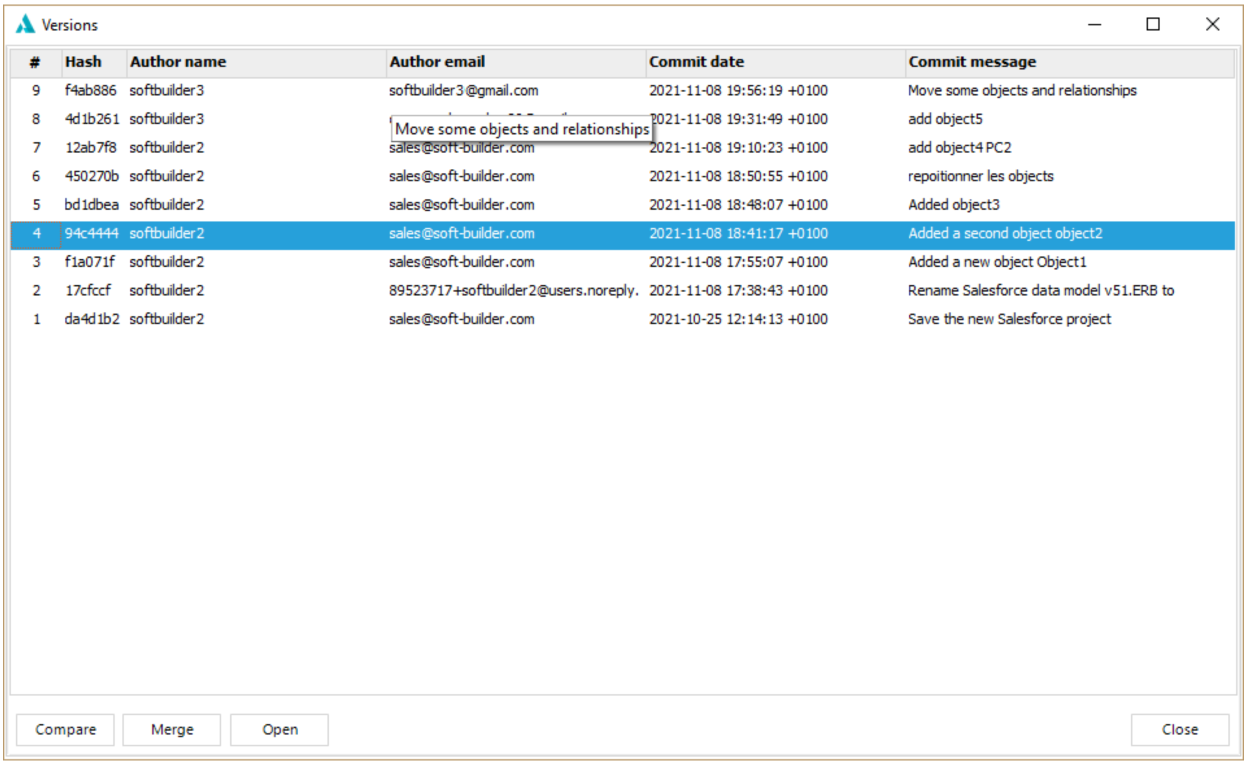
Available in: Enterprise Edition.

Manage versions

To display the multiple versions committed by the different collaborators of your data-modeling project, navigate to **"Repository"** from the main menu and click **"versions"**.



A list of all the commits will be displayed with the details about each one (Hash, author name, author email, commit date, and the commit message).

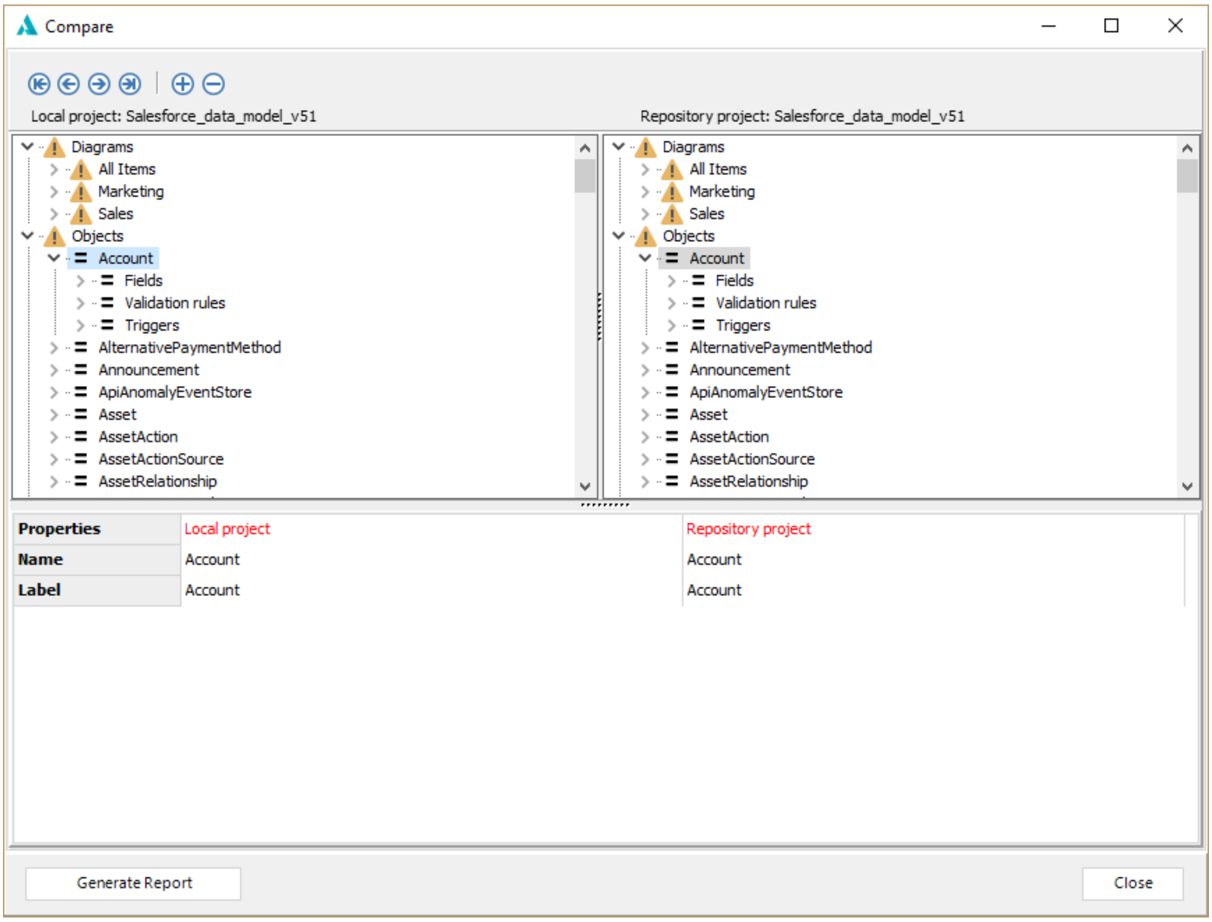


Available in: Enterprise Edition.

Compare with versions

To compare your current data model with any of the listed versions, just select the version you want to compare with then click on the **"Compare"** button.

A comparison window will appear with all the differences found. You can generate a report of this comparison and open it with your favorite web navigator.

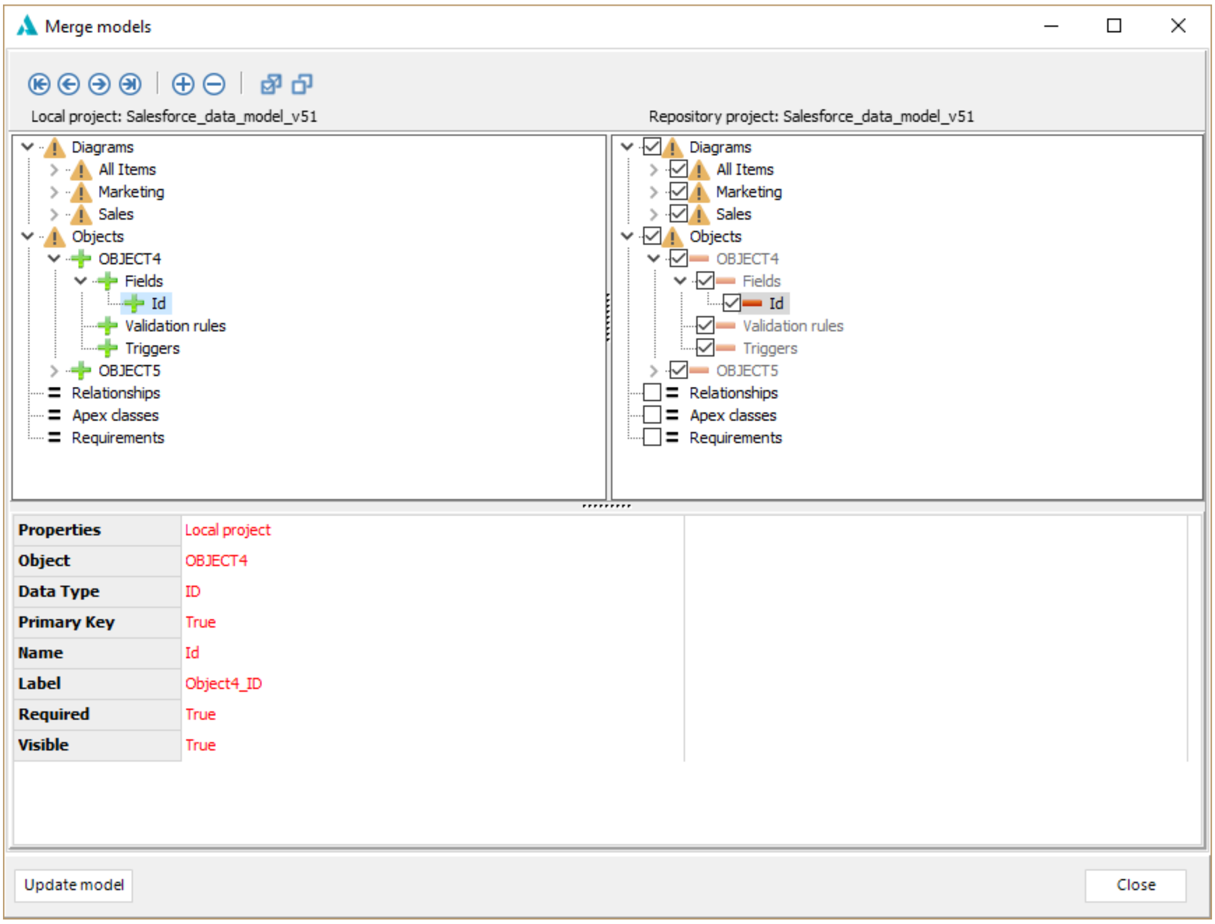


Available in: Enterprise Edition.

Merge with versions

You have the ability to merge the current model with one of the committed version by selecting the concerned version then click on **"Merge".**

On the merge screen, AbstraLinx will show you the differences between your current model and the selected version. Select the objects you want to include to the merge operation the click on **"Update model"**.

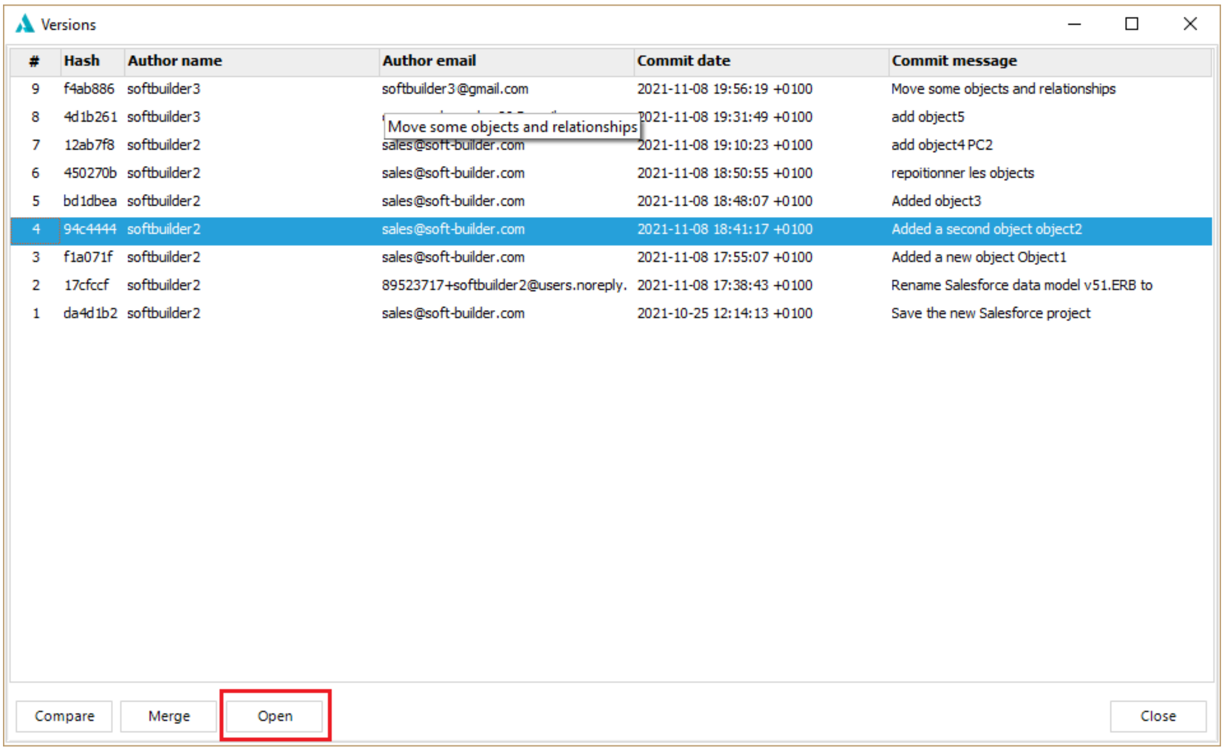


Available in: Enterprise Edition.

Open a version

In addition, to the comparison and the merge of versions functionalities, you can also open a specific version as a new project from the list of the committed versions.

To do that, select the version you want to open then click on **"Open".** When you click on "open", you will be invited to specify a new empty folder to save the new project.

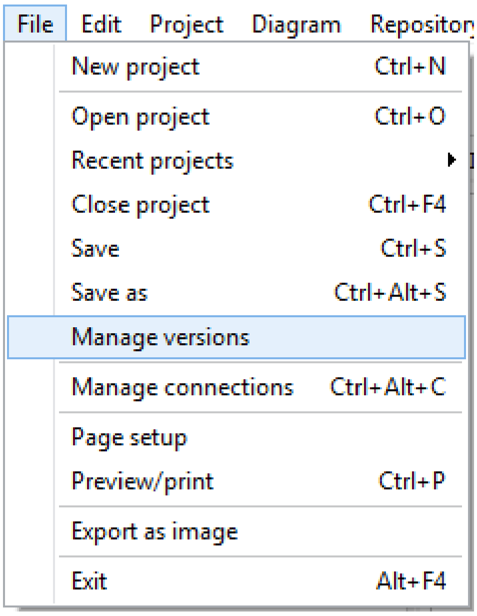


Available in: Enterprise Edition.

Versions management

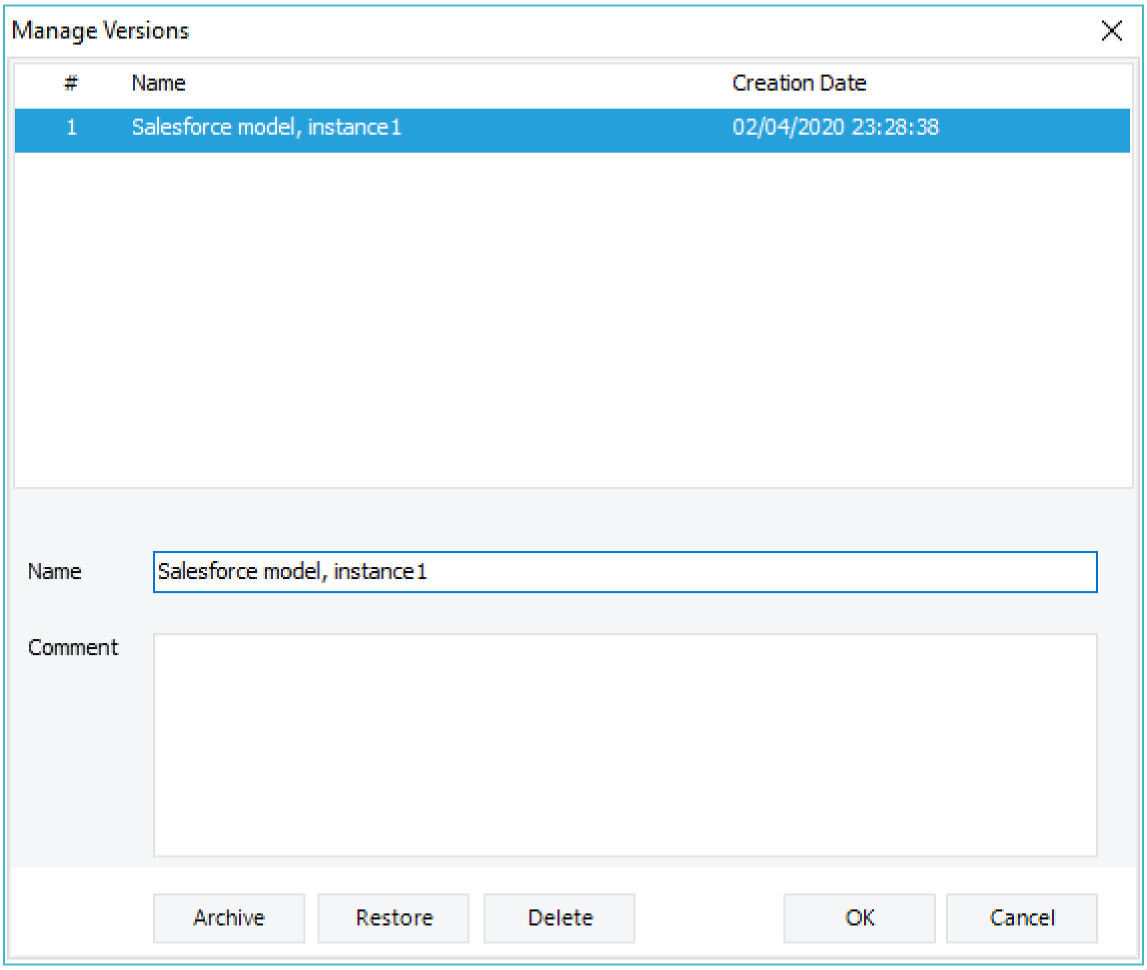
AbstraLinx offers an indexed and integrated archiving system. To archive a project:

1. Click on **"File | Manage Versions"**:



2. In the **“Archive Version”** window, click on **“Archive”**

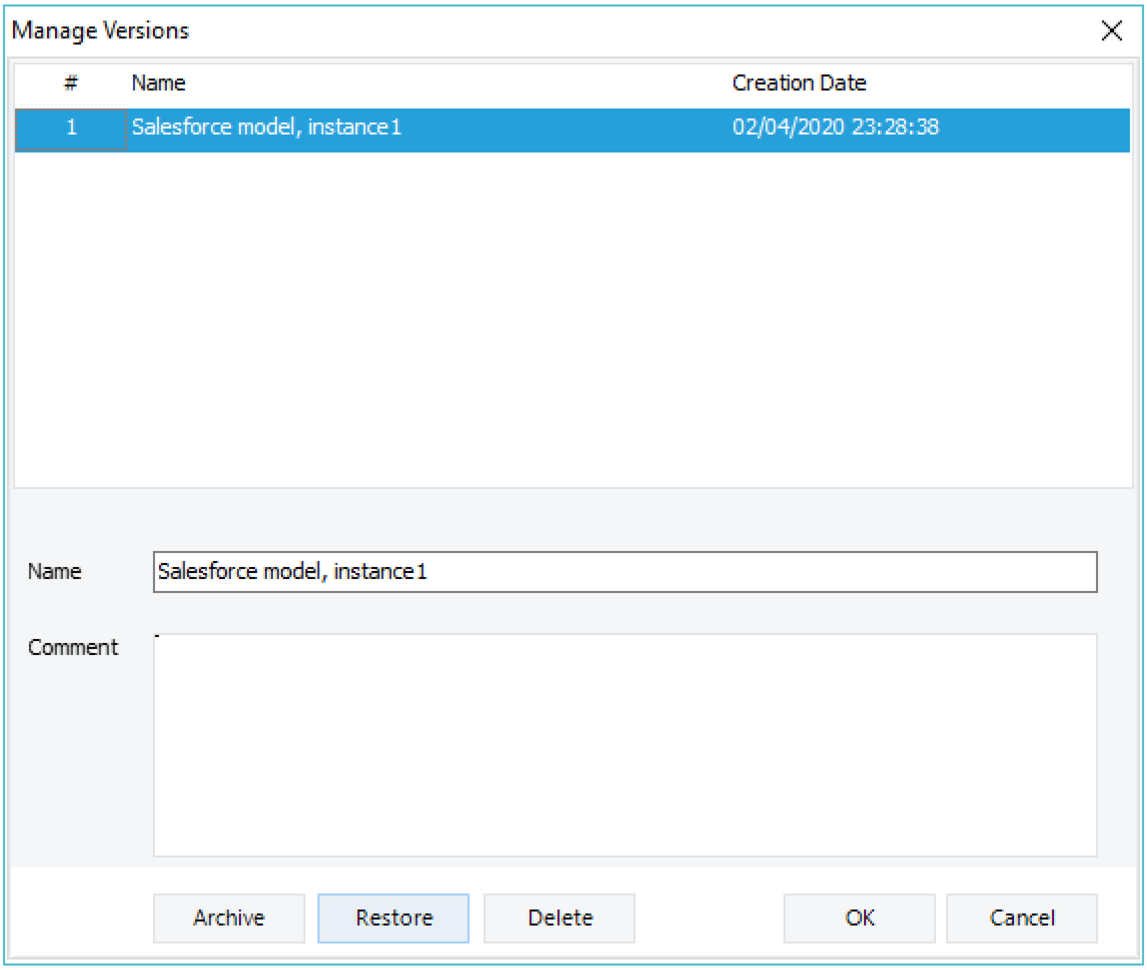
3. Specify a name and a comment for the version:



4. Click on **“OK”**.

To restore an archived version of a project:

1. In the “**Manage Versions**” window, select the archived version you want to restore, then click in “**Restore**”.



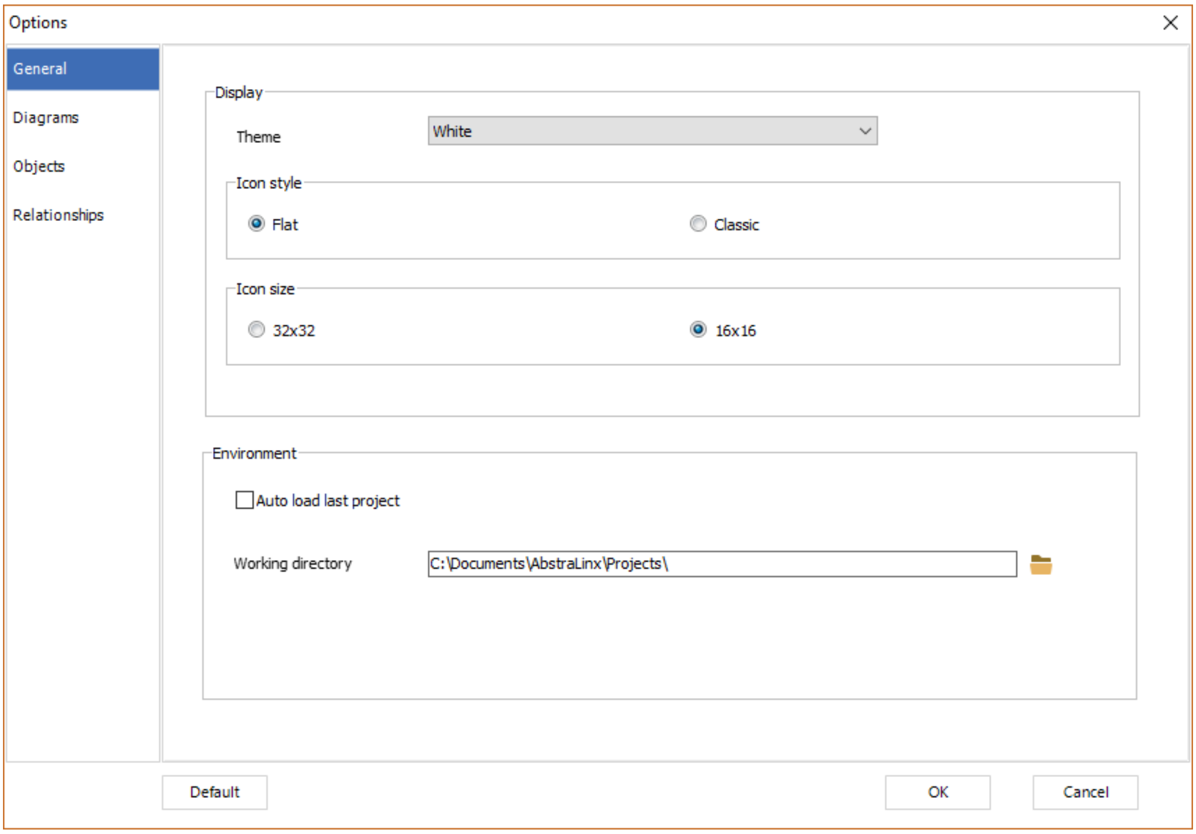
Available in: Standard, Professional and Enterprise Editions

Options management

A number of options are available for customizing your project. To open the options window go to "**Tools | Options**":

You can also access the Options window from the icon from the toolbar:

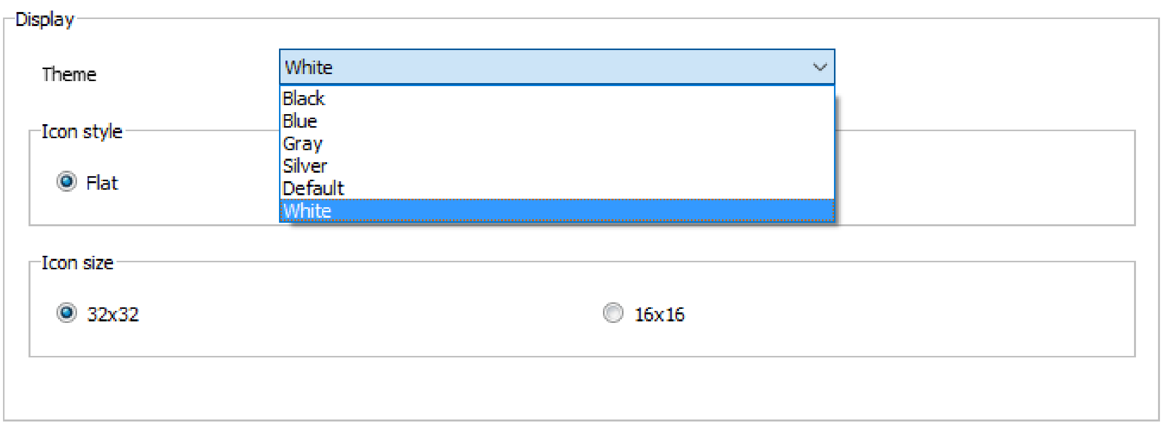
A window will appear which contains four tabs. Each one has specific options.



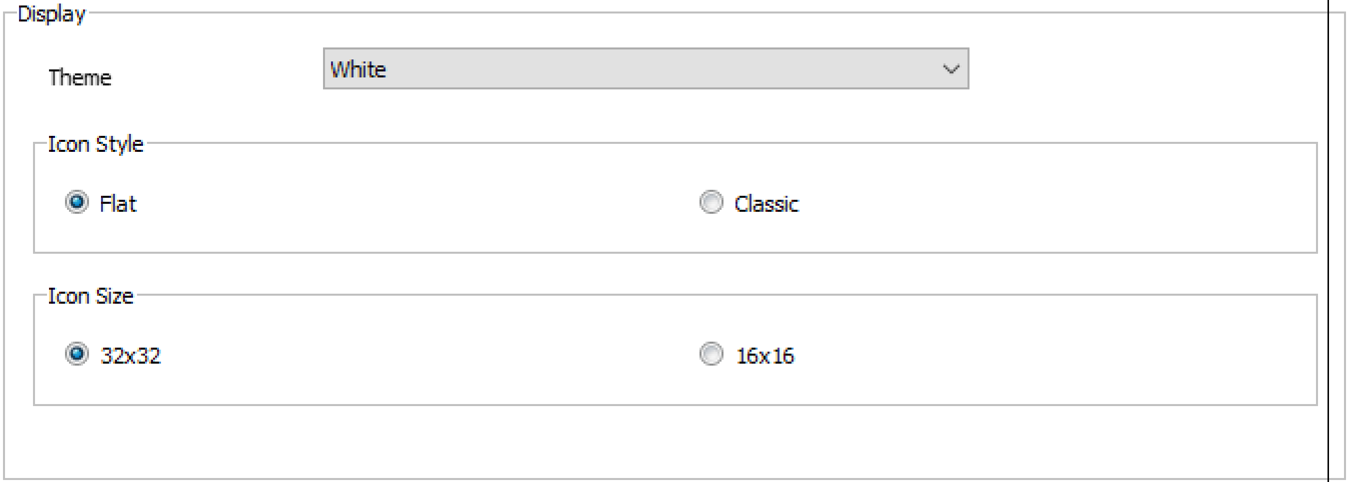
General tab

This tab contains two sections: Display and Environment

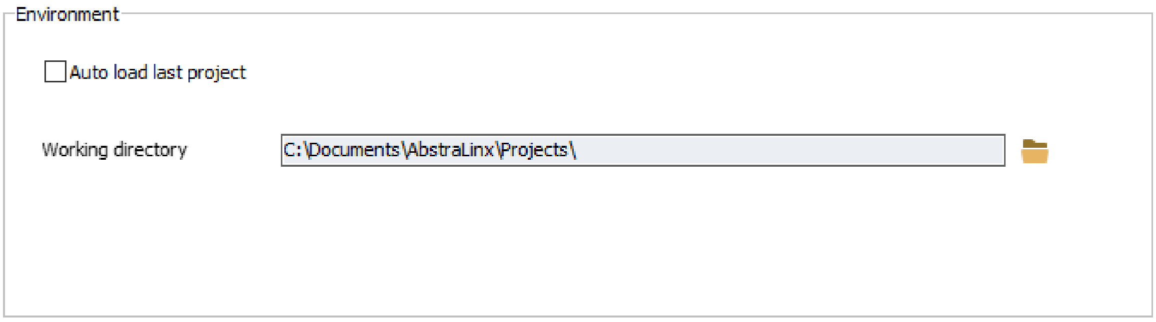
- **Display:** In this section, you can choose a theme from the list of themes:



You can also change the style of the icons (Flat or Classic) as well as their size (32x32 or 16x16):



- **Environment**: In this section, you can load the last project you worked on upon launching the software. You can also change the working directory by opening a file and opening a dialog box to select the directory.

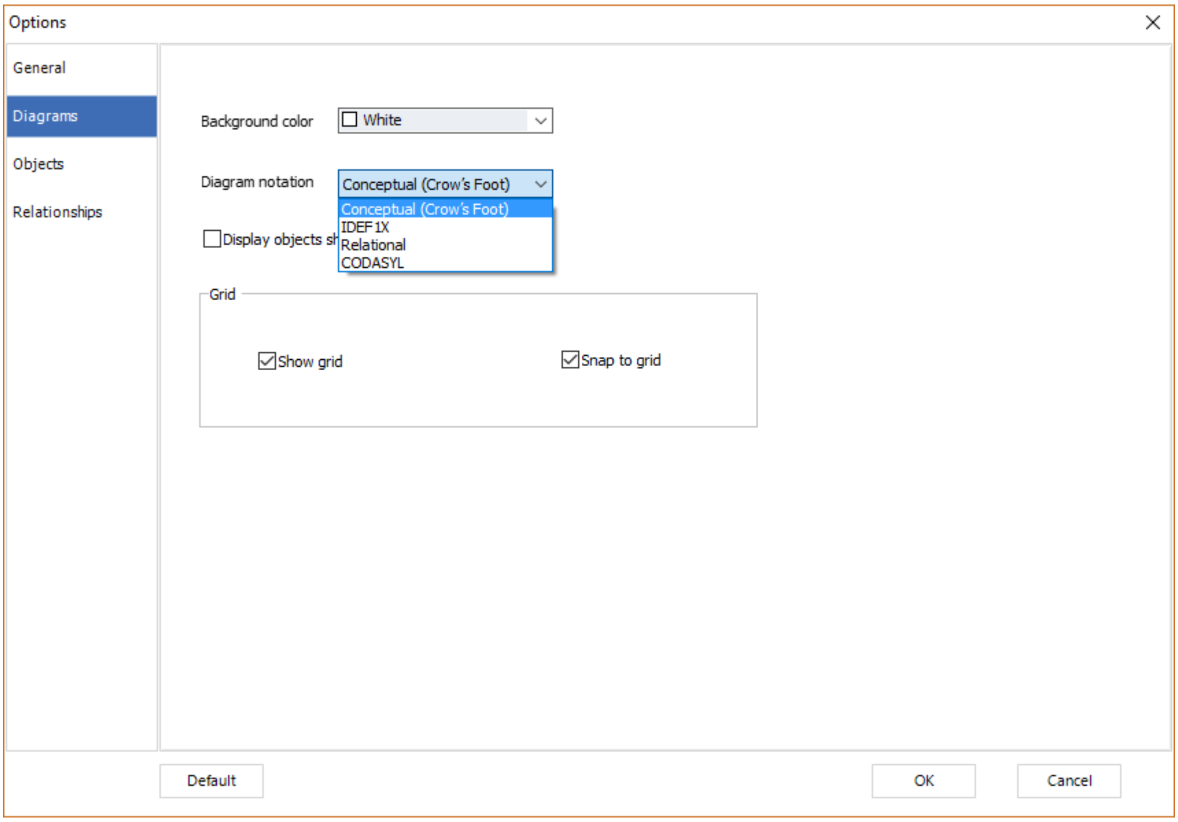


Available in: Standard, Professional and Enterprise Editions

Diagram tab

In this section, you can customize the following options:

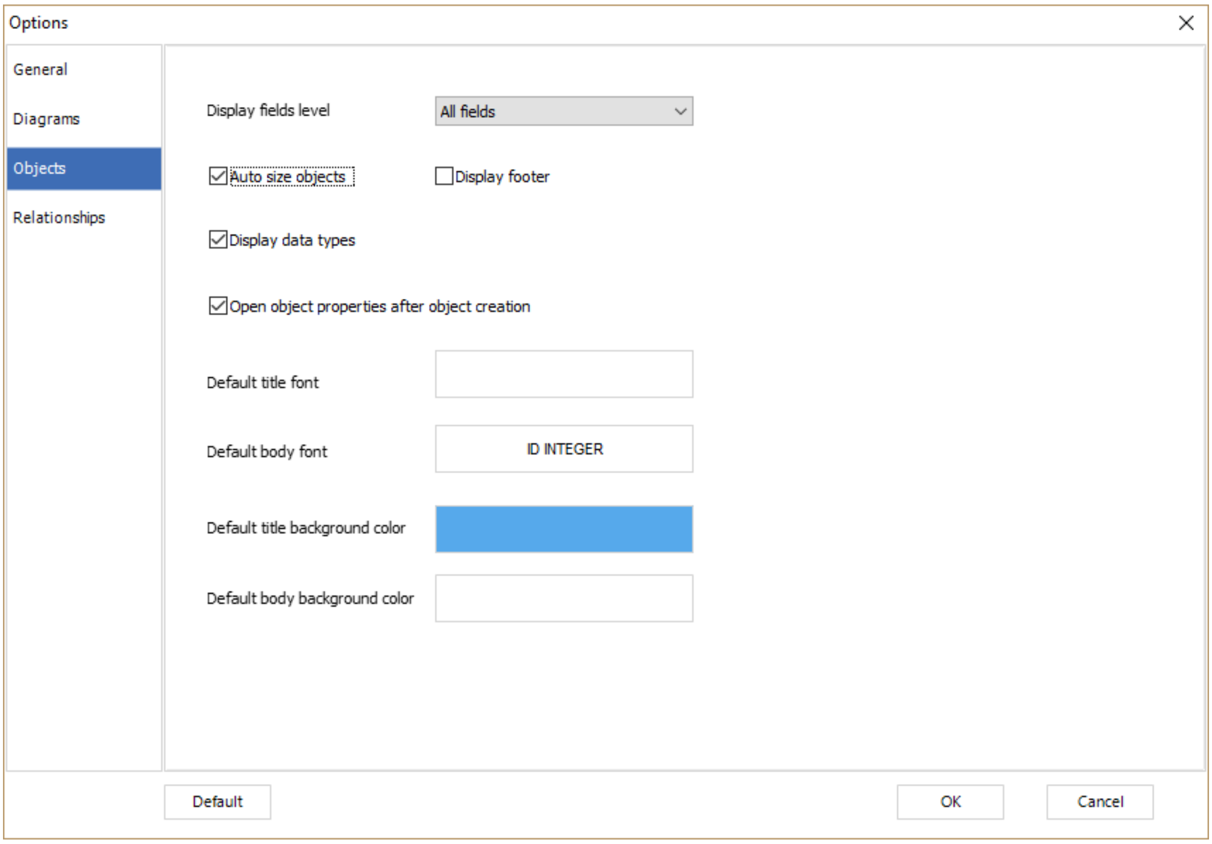
- **The background color:** change the background color of a diagram;
- **Diagram notation:** specify the notation you want to use on your project. You can choose between four possible notations: Relational, IDEF1X, Conceptual (Crow's foot) and CODASYL;
- **Display objects shadow:** show/hide objects shadow in the diagram.
- **Show grid:** Check this option to show/hide the grid in the diagram area.
- **Snap to grid:** Align objects created in the diagram area to the grid.



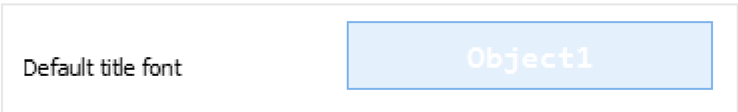
Available in: Standard, Professional and Enterprise Editions

Objects tab

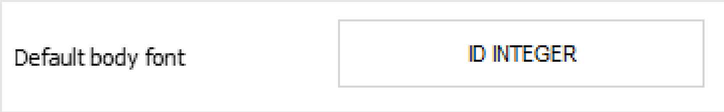
In this section, you can change the properties of an object:



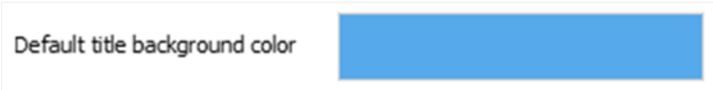
- **Display fields level:** You can change the properties of the fields to display in the objects by selecting the following values: All fields, Primary keys, Keys, No fields.
- **Auto size objects:** To adjust the size with the object contents in the diagram, check the Auto size objects option.
- **Display data types:** To display data types in the objects, check the Display data types option.
- **Display footer:** Check to display a footer section under each object representation, which include the number of fields displayed
- **Open object properties after object creation:** check this option if you want to open the object management form after creating an object
- **Default title font:** To change the title style of the object in the diagram, click on the **Object1** button to display a window that contains a list of fonts, sizes, styles, effects, colors, and scripts.



- **Default body font:** To change the styles of the attributes object displayed in the diagram, click on the **ID INTEGER** button to display a window containing a list of fonts, sizes, styles, effects, colors, and scripts.



- **Default title background color:** This option allows you to change the color of the object header title in the diagram by selecting a color from the window displayed after clicking on the button:

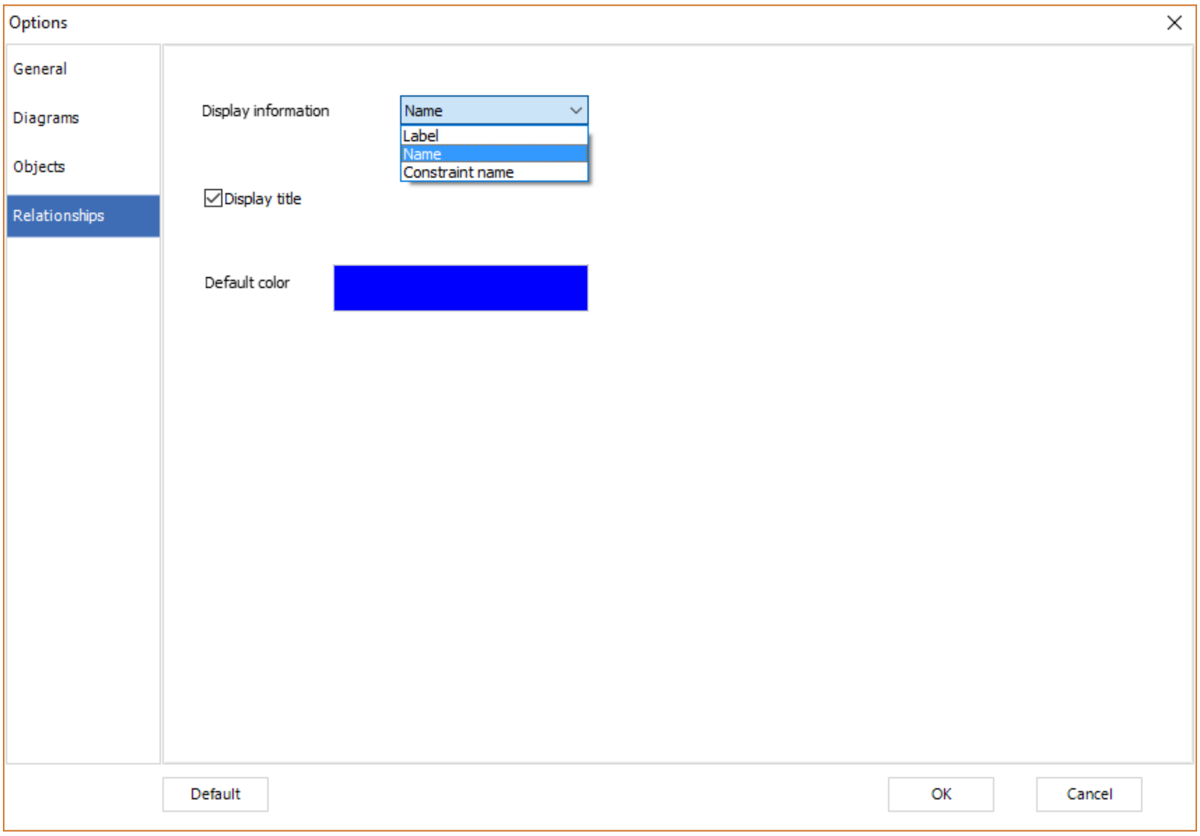


- **Default body background-color:** This option allows you to change the color of the object body in the diagram by selecting a color from the window displayed after clicking on the button:

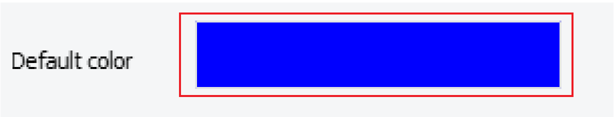
Available in: Standard, Professional and Enterprise Editions

Relationships tab

In this section, you can change the properties of relationships:



- **Displaying information:** You can select the title of the relationship to display it in the diagram. The title values to display include label, Name, and Constraint Name.
- **Displaying title:** To show/hide the relationship name in the diagram, check the **"Display Title"** option.
- **Default color:** You can change the default color of the relationship by clicking on the button and selecting the color:



Available in: Standard, Professional and Enterprise Editions