User Guide

AbstraLinx v3

SOFTWARE VERSION 3 BY SOFTBUILDER



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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/



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



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".

File	Edit	Project	Diagran	n Repositor
	New p	roject		Ctrl+N
	Open	project		Ctrl+O
	Recen	t projects		•
	Close	project		Ctrl+F4
	Save			Ctrl+S
	Save a	s		Ctrl+Alt+S
	Manag	ge version	s	
	Manag	ge connec	tions	Ctrl+Alt+C
	Page s	etup		
	Previe	w/print		Ctrl+P
	Export	as image		
	Exit			Alt+F4

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

Connection Name My_new_org New connection production org Categories side	
New connection production org Calcionary side	
Colorform what	
Salesforce trial pro	·
Test Salesforce connection	
Environment Production	·
URL https://login.salesforce.com	
Username test@gmail.com	
Security token sGifiJT3fkPW7LLnl55tcf0k1	
Important: AbstraLinx uses Salesforce API access to import metadata. AbstraLinx is available for Professional (with API enabled), Enterprise, Unlimit and Developer Editions	d
OK He	р

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.

Connection Name	~		General	Descr	iption
My_new_org					
New connection			Name		Ми рем ога
production org			Name		INY_ICM_OIG
Salesforce trial					
Salesforce trial pro			Authentic	ation	Simple V API version 54 V
Sandbox org					
Fest Salesforce connection		\checkmark	🗌 l have	e a cust	om Salesforce domain
				_	
		🖌 Ар	ply change	sht	Production ~
		\sim			
			LIDI		https://login.salesforce.com
			URL		Trape. 77 og inte dicercic com
		8			
		-	Username	2	test@gmail.com
			Security t	oken	sGjfiJT3fkPW7LLnl55tcf0k1
			Important	: Abstra	Linx uses Salesforce API access to import metadata.
			AbstraLin	x is ava	Ilable for Professional (with API enabled), Enterprise, Unlimited
	×		and Deve	eloper E	ditions.
					OK Usis

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

Con My_new_org	nection Name	^	+	General Description
New connection production org Salesforce trial Salesforce trial pro Sandbox org Test Salesforce cor	ne '		/	Name My_new_org Authentication Simple API version 54
	Connection name Username: test@	n e: My_new_or @gmail.com	g	
			_	ОК
				Important: AbstraLinx uses Salesforce API access to import metadata. AbstraLinx is available for Professional (with API enabled), Enterprise, Unlimited and Developer Editions.

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 <u>step-by-step guideline</u>.

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.

Manage connections				X
Connection Name	^	General	Descri	ption
My_new_org New connection production org Salesforce trial		Name		My_new_org
Salesforce trial pro Sandbox org		Authenti	cation	Connected App V API version 54 V
Test Salesforce connection	~	🗌 l hav	e a custo	m Salesforce domain
	×	Apply chang	es l ent	Production
		URL		https://login.salesforce.com
	-	Usernam	e	test@gmail.com
		Security	token	sGjfJT3fkPW7LLnI55tcf0k1
		Consume	er key	3MVG9sh10GGnD4Dv.hCvHQ5Q1eUkJ3zoxkv.qibCDGEG
		Consume	er secret	09D76602C9E82D280A21568D4F8EC9585660C575BA51
	v .	<u>Importan</u> AbstraLir and Dev	<u>t:</u> Abstral nx is avail eloper Ec	.inx uses Salesforce API access to import metadata. lable for Professional (with API enabled), Enterprise, Unlimited ditions.
				OK Help

Available in: Standard, Professional and Enterprise Editions

Editing an existing connection

To modify the properties of an existing connection:

1. Select "File | Manage connections":

File	Edit Project	Diagram	Repositor
	New project		Ctrl+N
	Open project		Ctrl+O
	Recent projects		•
	Close project		Ctrl+F4
	Save		Ctrl+S
	Save as	C	trl+Alt+S
	Manage version	s	
	Manage connec	tions Ct	rl+Alt+C
-	Manage connect	tions Ct	rl+Alt+C
	Manage connec Page setup Preview/print	tions Ct:	rl+Alt+C Ctrl+P
	Manage connec Page setup Preview/print Export as image	tions Ct	rl+Alt+C Ctrl+P
	Manage connec Page setup Preview/print Export as image Exit	tions Ct	Ctrl+P Alt+F4

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

Manage connections			×
Connection Name	^ +	General Descr	iption
New connection production org	-	Name	Test Salesforce connection
Salesforce trial Salesforce trial pro Sandbox org	/	Authentication	Simple V API version 54 V
Test Salesforce connection		i nave a cust	om Salesforce domain
		Environment	Production
	-	URL	https://login.salesforce.com
	6	Username	salesforce.dev@test.com
		Security token	M8jlkgAZ3PQ7ffpzHyEuZuT4o
	~	<u>Important:</u> Abstra AbstraLinx is ava and Developer E	Linx uses Salesforce API access to import metadata. ilable for Professional (with API enabled), Enterprise, Unlimited ditions.
			OK Help

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":

File	Edit	Project	Diagram	Repositor
	New p	oroject		Ctrl+N
	Open	project		Ctrl+0
	Recen	t projects		•
	Close	project		Ctrl+F4
	Save			Ctrl+S
	Save a	s	C	trl+Alt+S
	Mana	ge version	IS	
	Mana	ge connec	tions C	trl+Alt+C
	Pages	setup		
	Previe	w/print		Ctrl+P
	Export	as image		
	Exit			Alt+F4

2. Select the connection you want to delete then click on " — ":

Manage connections			×
Connection Name	^ +	General Descr	iption
New connection production org Salesforce trial		Name	Test Salesforce connection
Salesforce trial pro Sandbox org Test Salesforce connection		I have a cust	om Salesforce domain
		Environment	Production
	_	URL	https://login.salesforce.com
	6	Username	salesforce.dev@test.com
		Security token	M8jlkgAZ3PQ7ffpzHyEuZuT4o
	*	<u>Important:</u> Abstra AbstraLinx is ava and Developer E	Linx uses Salesforce API access to import metadata. ilable for Professional (with API enabled), Enterprise, Unlimited ditions.
			OK Help

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

Lonnection Name	~	- 4 -1	General Des	scription
4y_new_org				
New connection		_	Nama	Test Salesforce connection
production org		_	Name	
alesforce trial				
alesforce trial pro			Authentication	Simple V API version 54 V
andbox org				
est Salesforce connection			🗌 l have a cu	ustom Salesforce domain
			Environment	Production
Col	nfirm			×
	_			m
	📄 Do you	u want t	o delete this reco	ord?
				Yes No
				JT40
			Important: Abs	straLinx uses Salesforce API access to import metadata.
			AbstraLinx is a	wailable for Professional (with API enabled), Enterprise, Unlimited

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:

File	Edit Pr	oject	Diagram	Repositor						
	New proj	ect		Ctrl+N						
	Open pro	ject		Ctrl+0						
	Recent pr	ojects		•						
	Close pro	ject		Ctrl+F4						
	Save			Ctrl+S						
	Save as		Ctrl+Alt+S							
	Managev	ersion/	s							
	Manage o	onnec	tions Ct	trl+Alt+C						
	Page setu	ıp								
	Preview/p	print		Ctrl+P						
	Export as	image								
	Exit			Alt+F4						

 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).

▲ Import metadata from Salesforce ×									
1	-Connections selection Select one connection from the list below	w and click	next :						
ſ,	Connection name ERBuilder4SF	Version 52	URL https://login.salesforce.com	User name don.albert@test.com	^				
ľ	New connection	53	https://login.salesforce.com	tester@gmail.com2					
	New connection Edit			Next	~				

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.

🙏 Import metadata fi	rom Salesforce				×
2-Objects selection					
Select your objects to in	nport				
Objects [367/367]	Triggers [227/227]	Apex classes [257/257]			
Ab_c Account Account AlternativePaymentMi Announcement ApiAnomalyEventStor AppOintmentTopicTime AppUsageAssignment armenian_c AssetActionSource AssetActionSource AssetActionSource AssetActionSource AssetActationSource AssetActionSource AssetActionSource AssetActationSource AssetBationShip AssetBationShip AssetBationShip AssetBationShip AssetBationShip CollCenter	ethod e Slot sent aUse t				~
				☑Draw [®] A	ll items" diagram
Select all Uns	elect all			Back	Import

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

	AbstraLinx	User Guid	le v3
AbstraLinx - Enterprise Edition - Trial File Edit Project Diagram Repository Tool	s Help	ta model browser	- Childs count Childs count Clear search
<	AssetStation AssetStation AssetStation AssetStation AssetStationsure AssetStationsure	elationships In diagram	
<	Back Import		Hide objects in diagram
N° Time Operation			^
26- 09:37:48 Loading objects(240/367 obj	ects)		
27- 09:37:53 Loading objects(250/367 obj	ects)		*
General Reverse engineer			
DB : salesforce			

 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.

🔥 AbstraLinx - Enterprise Edition - Trial	- 0 ×
File Edit Project Diagram Repository Tools Help	
*```= !! = !:: !:: ::: ::: ::: !::: !	
B-	Data model browser 부
□ Project468	
All Items	Parents count 0 Children count 0
Diagram_1	Display objects All
B Objects ab Account allTypes	Search
id D (f id D id D id	Advanced search Clear search
Alternative Document Mathema ADI Assembly Event Stars Application	Object Label Parents Children (^
Art Anomaly Event Store Approach	▶ab 1 6 ¢
	Account 4 42 /
Information X	Alternative Payment Method 3 0
Application Usage Assignment	Announcement 2 1
ld D (f By default, all relationships are hidden in "All Items"	API Anomaly Event Store 1 2 /
diagram. To display relationships go to "Diagram ->	Application U U U U U U U U U U U U U U U U U U U
Asset Action	Appointment Topic Time Slot 5 1 /
ld I OK) ld	< >
	Relationships In diagram
	Name
	All Items
	×
	<
40- 12:14:32 Loading apex dasses	
41- 12:15:31 Loading relationships	
42- 12:15:31 Success	
General Reverse engineer	
D8 : salesforce	

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":

File	Edit Project	Diagram	Repositon					
	New project		Ctrl+N					
	Open project		Ctrl+O					
	Recent projects		•					
	Close project		Ctrl+F4					
	Save		Ctrl+S					
	Save as	Ct	Ctrl+Alt+S					
	Manage versions	5						
	Manage connect	tions Ct	rl+Alt+C					
	Page setup							
	Preview/print		Ctrl+P					
	Export as image							
	Exit		Alt+F4					

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.

Project prope	erties	×									
General [Description										
Caption	Salesforce Data Model										
Name	Salesforce_Data_Model										
Company	Softbuilder										
Comment:	This is a sample comment										
Author:	J.modeler										
Copyright:	©Softbuilder2021										
Version:	1.0										
	OK Cancel										

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":

	All Items							C)ia	ıg	ram_1	×	
ŀ				•	•	•	•	•	•	•		Add diagram Ctrl+T	
:	:	:	:	:	:	:	:	:	:	:		Delete diagram Ctrl+W	
	:	:	:	:	:	÷	:		:	:		Diagram properties	
1											_		

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"**:

	A	II	It	en	15				Di	ag	ra	m	1	-	×																
																	A	d	d (dia	ag	ra	m	ı			0	Cti	l+	Т	
:	:	:	:	:	:	:	:	:	:	:	:	:	:				D	el	et	e	di	ag	ļra	m	h		С	trl	+	W	
:	:	:	:	:	:	:	:	:	:	:	:	:	:	Γ			D	ia	gr	aı	m	р	ro	pe	ert	ie	s				
ŀ	·	·	·	·	·	·	·	·	•	·	·	·	·	5	-	-	-	-		-	-	-	-	-	-	-	-	-	-	-	

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

Diagram properties		×
Name	Sales diagram	
Display fields level	All attributes	~
Display fields data	a types	
☑ Display relationsh	ip title	
	OK	Canad
	OK	Cancel

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

Diagram properties			×
Name	Sales diagram	1	
Display fields level	All fields		~
Display fields data	types		
Display relationshi	p title		
	C	ОК	Cancel

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.

Diagram properties		×
Name	Sales diagram	
Display fields level	All fields	\sim
⊡Display fields data	All fields Primary keys	
Display relationship	Keys No fields	
	OK Cancel	

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

Diagram properties	:	×
Name	Sales diagram]
Display fields level	All fields V	
Display fields data	types	
Display relationshi	o title	
	OK Cancel	

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

	×
Sales diagram	
All fields	~
a types	
ip title	
ОК	Cancel
	Sales diagram All fields a types nip title OK

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"**.

🙏 Add 1	to diagram		_		×
Objects	Relationships				
State	Label	Name			
	Account	Account			
	Contract	Contract			
	Opportunity	Opportunity			
	Opportunity Product	OpportunityLineItem			
\checkmark	Order	Order			
\checkmark	Order Product	OrderItem			
\checkmark	Price Book	Pricebook2			
	Price Book Entry	PricebookEntry			
\checkmark	Product	Product2			
\checkmark	Quote	Quote			
\checkmark	Quote Line Item	QuoteLineItem			
<					>
			Add	Close	e

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"**.

			· · · · · · · · ·	· · · · · · · · · · ·	· · · · · · · · · · · · ·	
Lead					Contact	
ld IsDeleted MasterRecordid	ID CHECKBOX LOOKUP		· · · · · · · · · · · · · · · · · · ·	Id IsD	eleted	
LastName	TEXT(80)	<u>an te</u> t		Сору С	trl+C	
FirstName Salutation	TEXT(40) PICKLIST			Delete		TEXT(
Name	TEXT(121)	<u> </u>		Color		
Title	TEXT(128) TEXT(255)			Split		TEXT(
Street	TEXT AREA(255			Merge		· · · · · · · · · · · · · · · · · · ·
	e e e Xe e e	· · · · · · ·	}	Hide relationshi	ip	
· · · · · · · · · · · · · · · ·				AutoLink	: : : : : : : : :	
· · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·]::::[Properties		
· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · ·	· · · · · · ·		· · · · · · · · · · · ·		· · · · · · · · · · · · · · · · · · ·

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**".

Diagram		Repository	Tools	Help
	Add diagram		Ctr	+T
	Delete diagram		Ctrl	+W
	Add objects/relat		onships	
	Show/hide relation		nships	
	Diagram properti		is	

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

🙏 Show/h	ide relationships				_		×
Visible 🍸	Name 🛛	Parent ob	ject 🍸	Child object			
	MasterRecord	Account		Account			
\checkmark	Parent	Account		Account			
\checkmark	Account	Account		Contract			
\checkmark	Pricebook2	Pricebook2		Contract			
\checkmark	Account	Account		Opportunity			
\checkmark	Pricebook2	Pricebook2		Opportunity			
\checkmark	SyncedQuote	Quote		Opportunity			
\checkmark	Opportunity	Opportunity	,	OpportunityLineIte	em		
\checkmark	PricebookEntry	PricebookEn	itry	OpportunityLineIte	em		
\checkmark	Product2	Product2		OpportunityLineIte	em		
\checkmark	Contract	Contract		Order			
\checkmark	Account	Account		Order			
\checkmark	Pricebook2	Pricebook2		Order			
\checkmark	OriginalOrder	Order		Order			
\checkmark	Product2	Product2		OrderItem			
\checkmark	Order	Order		OrderItem			
\checkmark	PricebookEntry	PricebookEn	itry	OrderItem			
\checkmark	OriginalOrderItem	OrderItem		OrderItem			
\checkmark	Pricebook2	Pricebook2		PricebookEntry			
\checkmark	Product2	Product2		PricebookEntry			
\checkmark	Opportunity	Opportunity	1	Quote			
\checkmark	Pricebook2	Pricebook2		Quote			
\checkmark	Contract	Contract		Quote			
\checkmark	Account	Account		Quote			~
<						>	·
			Clear filter	ОК		Close	

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

🙏 Show/h	ide relationships		-	<
Visible 🍸	Name 🍸	Parent object	Child object	^
\checkmark	MasterRecord	Account	Account	
	Parent	Account	Account	
\checkmark	Account	Account	Contract	
\checkmark	Pricebook2	Pricebook2	Contract	
	Account	Account	Opportunity	
	Pricebook2	Pricebook2	Opportunity	
	SyncedQuote	Quote	Opportunity	
	Opportunity	Opportunity	OpportunityLineItem	
\checkmark	PricebookEntry	PricebookEntry	OpportunityLineItem	
\checkmark	Product2	Product2	OpportunityLineItem	
\checkmark	Contract	Contract	Order	
	Account	Account	Order	
\checkmark	Pricebook2	Pricebook2	Order	
	OriginalOrder	Order	Order	
	Product2	Product2	OrderItem	
\checkmark	Order	Order	OrderItem	
\checkmark	PricebookEntry	PricebookEntry	OrderItem	
\checkmark	OriginalOrderItem	OrderItem	OrderItem	
	Pricebook2	Pricebook2	PricebookEntry	
	Product2	Product2	PricebookEntry	
\checkmark	Opportunity	Opportunity	Quote	
\checkmark	Pricebook2	Pricebook2	Quote	
\checkmark	Contract	Contract	Quote	
	Account	Account	Quote	~
<			>	
		Clear filter	OK Close	

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"**.

File	Edit	Project	Diagram	Repositor		
	New p	roject		Ctrl+N		
	Open	project		Ctrl+O		
	Recen	t projects		•		
	Close	project		Ctrl+F4		
	Save			Ctrl+S		
	Save a	s	0	Ctrl+Alt+S		
	Manag	ge version	s			
	Manag	ge connec	tions C	Ctrl+Alt+C		
	Page s	etup				
	Previe	w/print		Ctrl+P		
	Export	as image				
	Exit			Alt+F4		

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):

File	Edit	Project	Diagram	Repositor
	New p	roject		Ctrl+N
	Open	project		Ctrl+0
	Recen	t projects		•
	Close	project		Ctrl+F4
	Save			Ctrl+S
	Save a	s	C	trl+Alt+S
	Manag	ge version	s	
	Manag	ge connec	tions Ct	rl+Alt+C
	Page s	etup		
	Previe	w/print		Ctrl+P
	Export	as image		
	Exit			Alt+F4

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:

Opportunity				
Opportunity ID	ID	(PK)		
Deleted	CHECKBOX			
Account ID	LOOKUP	(FK)		
Private	CHECKBOX			
Name	TEXT(120)			
Description	TEXT AREA(32000)			
Stage	PICKLIST			
Amount	CURRENCY(16,2)			
Probability (%)	PERCENT(3,0)			
Expected Amount	CURRENCY(16,2)			
Quantity	NUMBER(16,2)			
Close Date	DATE			
Opportunity Type	PICKLIST			

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.

🙏 Object : Acc	ount/Account	-		×
Object Fields	Validation rules Triggers Description Requirements Custom metadata	Open ir	browse	r 🌐
Ishel	Account			
Label				
Name	Account			
Comment	Account and Contact Management			
	Gives complete information about your customers including previous communications, activity history, inter	nal ac	CI	
	٢		>	
	ОК		Cance	4

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".

· · · · · · · · · · · · · · · · · · ·	••••••••••••••••••••••••••••••••••••••
Lead	
Id (PK) IsDeleted MasterRecordId (FK)	
LastName FirstName Salutation	Copy Ctrl+C
Name Title Company	Duplicate Ctrl+U
Street	Hide all related relationships
	Color / Font / Reflexive relationship
	Properties

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).

Lead			
d sDeleted	(PK)		· · · · · · · · · · · ·
lasterRecordid	(FK)	Сору	Ctrl+C
astName		Delete	Del
alutation		Duplicate	Ctrl+U
lame		Styles	•
Title Company Street		Hide all related relationships Show all related relationships	
Reflexive relationship			
		Properties	

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

ast object			×
Source obj	ect		
Label	Lead		
Name	Lead		
Destination	object		
Label	Leadl		
Name	LEAD1		
-			
		ОК	Cancel

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.
| Lead | | | · · · · · · · | · · · · · · · |
|---|------------------|---|------------------|---|
| ld
IsDeleted | (PK) | | · · · · · · · · | · · · · · · · · |
| MasterRecordld
LastName
FirstName | Copy
Delete | | Ctrl+C
Del | |
| Salutation
Name
Title | Duplic
Styles | ate | Ctrl+U
▶ | |
| Company
Street | Hide a | ll related relation
all related relation | iships
nships | ::::::
::::::::::::::::::::::::::::::: |
| · · · · · · · · · · · · · · · · · · · | Color / | / Font / | Þ | |
| | Reflexi | ve relationship | | 11111 |

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/..."**

AbstraLinx User Guide v3 Lead ld (PK) IsDeleted MasterRecordId (FK) LastName Ctrl+C Copy FirstName Delete Del Salutation Name Ctrl+U Duplicate Title Styles • Company Street Hide all related relationships Show all related relationships Color / Font /... ۲ Object name ۶ Background color Fields Font ۲ Reflexive relationship Properties

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:

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	Parent Object		• •	·	• •	·	• •	·	• •	·		• •	·	• •	·	Child Object
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	Object1_ID (PK)	1.1	2.1											۰. خر		Object1_ID .
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3. To create a reflexive relationship, right-click on the object, and then click on "Reflexive

relationship" from the contextual menu.

Acco	unt		
Account ID	ID	(PK) · · · · · · · · · · · · · · · · · · ·	
Master Record ID	LOOKUP	(FK)	
Parent Account ID	LOOKUP	(FK)	• •
Owner ID	LOOKUP	(FK)	- -
Created By ID	LOOKUP	Copy Ctrl+C	1
Last Modified By ID	LOOKUP	Delete Del	Ŀ
D&B Company ID Operating Hour ID	LOOKUP	Duplicate Ctrl+U	ŀ
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· · · · · · · · · · ·		Hide all related relationships	E
		Show all related relationships	
		Color / Font /	·
		Reflexive relationship	
	· · · · · ·	Properties	1:
		Properties	

Available in: Enterprise Edition

Edit a relationship

To edit an existing relationship:

1. Double click on the corresponding graphical representation:

				:		: :	:	: :	: :	:	: :	:	: :	:		:	• •	·	• •	·	• •	·	• •	·	• •	·	• •	·	• •	÷
Lead		:::		:		: :	:			:		:		:		:					A	lc	-0	ur	nt					ŀ
Lead ID	(PK)			:		: :	: :		: :	:		:		:		:	A	cco	unt	ID								(P	K)	ł
Deleted			• •	÷	• •	• •	•	• •	•	•	• •	·	• •	÷	• •	:	De	elet	ed											ł
Master Record ID	(FK)																A	cco	unt	Na	me							(P	K)	F
Last Name				÷		: :	:		: :			:		:	1		A	cco	unt	Ту	ре									ł
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Salutation				1		: :			: :		: :	:		:		:	Bi	lling	Ci	y										ţ
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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.

Relationship	: Account/fk_Contract_Account_	AccountId		×
	Child object		Parent object	
	Contract	>~+	Account	
General	Joins Options Requirements	Custom metadata		
Label	fk_Contract_Account_AccountId			
Name	Account			
			ОК	Cancel

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".

	• •		
Lead		Account	
Lead ID Deleted	(PK)	Account ID Deleted	(PK)
Master Record ID	(FK)	Account Name Account Type	(PK)
First Name Salutation		Copy Ctrl+C Street City	
Full Name Title		Delete State/Province Zip/Postal Code	
Company Street		Country	
		AutoLink	· · · · · ·
· · · · · · · · · · · · · · · · · · ·		Properties	· · · · · ·

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"**.

				• •	• •	• •	•	• •	• •	• •	•	• •	• •	•	• •	• •	•	• •	• •	• •	• •	• •	•	• •	• •	• •	• •	•
Acco	unt										:					: :	:		: :			: :	:	: :				
	unic													•	• •										• •			•
Account ID	ID	(PK)		• •	• •	• •	•	• •	• •	• •	·	• •	• •	•	• •	• •	·	• •	• •	• •	• •	• •	·	• •	• •		• •	•
laster Record ID	LOOKUP	(EK)			: :		:		: :	: :	:		: :			: :	:	: :		: :		: :	:	: :				
	LOOKUP	(115)																									-	ł
arent Account ID	LUUKUP	(FK)			• •	• •	•	• •	• •	• •	·		• •	•	• •					A	SS	et						l
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&B Company ID	LOOKUP	(EK)			: :		:			: :			: :			A	ccc	ount	D			L	.00	KU	Ρ	(Fl	C)	
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This is what the relationship looks like after applying the auto-link option

Acco	unt			· · ·	:			:			:	•	· ·	:			:		· ·	•		· ·	:						•	· ·		· ·	
Account ID	ID	(PK)																				• •											
Master Record ID	LOOKUP	(FK)			:			:			:	:		:			:	:			:		:			:			:				
Parent Account ID	LOOKUP	(FK)	: :	: :	:	:	: :	:	:	: :	:	:	: :	:	:	: :	:	:	:						۵	-	< e	+					
Owner ID	LOOKUP	(FK)		• •		•			-		·	•		·	•			•	·														
Created By ID	LOOKUP	(FK)			:			:			:	:		:			:		:	A	sse	et IC)					IC)			(P	K)
Last Modified By ID	LOOKUP	(FK)	~`					Ais	set	Pro) V k	deo	dBy	r :			:	Ċ,	٦	C	onta	act	D					L	00	KUI	Р	(F	K)
D&B_Company ID	LOOKUP	(FK)	~								÷									A	ccc	un	t ID					L	00	KUI	Р	(F	K)
Operating Hour ID	LOOKUP	(FK)	~	`				÷				:		:	:		:	:	:	Pa	arei	nt A	\ss	et	D			L	00	KU	Р	(F	K)
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				• •		•		·	•	• •	·	·	• •	·	•		·	•		•	•	• •		•	• •	·	•	•	·	• •	•		-

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"**



🙏 Show/ł	ide relationships				_		\times
Visible 🍸	Name 🍸	Parent ob	ject 🍸	Child obje	ect		
	Account	Account		Opportunit	y		
	Pricebook2	Pricebook2		Opportunit	y		
	SyncedQuote	Quote		Opportunit	y		
	Opportunity	Opportunit	y	Opportunit	yLineItem		
\checkmark	PricebookEntry	PricebookEr	ntry	Opportunit	yLineItem		
\checkmark	Product2	Product2		Opportunit	yLineItem		
\checkmark	Contract	Contract		Order			
	Account	Account		Order			
\checkmark	Pricebook2	Pricebook2		Order			
	OriginalOrder	Order		Order			
	Product2	Product2		OrderItem			
\checkmark	Order	Order		OrderItem			
\checkmark	PricebookEntry	PricebookEr	ntry	OrderItem			
\checkmark	OriginalOrderItem	OrderItem		OrderItem			
	Pricebook2	Pricebook2		PricebookE	ntry		
	Product2	Product2		PricebookE	ntry		
\checkmark	Opportunity	Opportunit	y	Quote			
\checkmark	Pricebook2	Pricebook2		Quote			
\checkmark	Contract	Contract		Quote			
	Account	Account		Quote			
\checkmark	Quote	Quote		QuoteLineI	item		
\checkmark	PricebookEntry	PricebookEr	ntry	QuoteLineI	tem		
\checkmark	OpportunityLineItem	Opportunit	yLineItem	QuoteLineI	item		
	Product2	Product2		QuoteLineI	item		~
<							>
			Clear filter		OK	Close	•

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".



Fields

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

A Object : Account/Account							— 🗆 X
Object Fields Validation rules	Triggers De	scription Requirements Cust	mmetadata				
Search here				General Desc	ription Requirements Custommetad	ata	Open in browser 🌐
PK FK Field name	Field type	Label	^				
Id Id	ID	Account ID		Primary key		nique	Visible
IsDeleted	CHECKBOX	Deleted	_				
MasterRecordId	LOOKUP	Master Record ID		Label	Deleted		IsDeleted
Name	TEXT	Account Name		Label	Deleted	Name	Isbeleted
Туре	PICKLIST	Account Type					
RecordTypeId	LOOKUP	Record Type ID					
ParentId	LOOKUP	Parent Account ID		Data type	CHECKBOX ~	Size	Cale Cale
BillingStreet	TEXT AREA	Billing Street					
BillingCity	TEXT	Billing City					
BillingState	TEXT	Billing State/Province		Default value	false	Data sensitivity	
BillingPostalCode	TEXT	Billing Zip/Postal Code				level	
BillingCountry	TEXT	Billing Country					
BillingLatitude	NUMBER	Billing Latitude		Data anna		Field	
BillingLongitude	NUMBER	Billing Longitude		Data owner		Field usage	
BillingGeocodeAccuracy	PICKLIST	Billing Geocode Accuracy					
BillingAddress	AUTO NUMBER	Billing Address					
ShippingStreet	TEXT AREA	Shipping Street		Compliance	1	Help text	1
ShippingCity	TEXT	Shipping City		Categorization			
ShippingState	TEXT	Shipping State/Province					
ShippingPostalCode	TEXT	Shipping Zip/Postal Code					
ShippingCountry	TEXT	Shipping Country					
ShippingLatitude	NUMBER	Shipping Latitude					
ShippingLongitude	NUMBER	Shipping Longitude					
ShippingGeocodeAccuracy	PICKLIST	Shipping Geocode Accuracy					
ShippingAddress	AUTO NUMBER	Shipping Address					
Phone Phone	PHONE	Account Phone		Everancia			
Fax	PHONE	Account Fax		Expression	1		
AccountNumber	TEXT	Account Number					
Website	URL	Website					
PhotoUrl	URL	Photo URL					
Sic	TEXT	SIC Code					
Industry	PICKLIST	Industry					
AnnualRevenue	CURRENCY	Annual Revenue					
NumberOfEmployees	AUTO NUMBER	Employees	~				
							OK Cancel

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 🕇

ject Fields Valid	ation rules Triggers D	escription Requirements	Custom me	tadata								
rch here					Capacal Dass	ription Paquirama	the Custom mate	adata		Openi	n brows	ser @
K FK Field nam	e Field type	Label	^	+	General Desc	npuon Requireme	its custommete	Judia		openi	1 010113	
Id	ID	Account ID		_	1 Primary key		ired	Unique				Visible
IsDeleted	CHECKBOX	Deleted		- Ado	d field	e neq		onique				TI DI DI C
MasterRecordId	LOOKUP	Master Record ID										
Name	TEXT	Account Name			Label	Deleted		Name	IsDeleted			
Type	PICKLIST	Account Type										
RecordTypeId	LOOKUP	Record Type ID								_		
ParentId	LOOKUP	Parent Account ID			Data type	CHECKBOX	~	Size	\$ Si	cale		\$
BillingStreet	TEXT AREA	Billing Street										
BillingCity	TEXT	Billing City										
BillingState	TEXT	Billing State/Province			Default value	false		Data sensitivity	/			
BillingPostalCode	TEXT	Billing Zip/Postal Code			Default value	ruise		level				
BillingCountry	TEXT	Billing Country										
BillingLatitude	NUMBER	Billing Latitude										
BillingLongitude	NUMBER	Billing Longitude			Data owner			Field usage				
BillingGeocodeAc	uracy PICKLIST	Billing Geocode Accuracy										
BillingAddress	AUTO NUMBER	Billing Address										
ShippingStreet	TEXT AREA	Shipping Street			Compliance	1		Help text	1			
ShippingCity	TEXT	Shinning City	Í		Categorization							
ShinningState	TEXT	Shipping State/Province										
ShippingPostalCo	de TEXT	Shipping Zin/Postal Code										
ShippingCountry	TEXT	Shipping Country										
Shipping atitude	NUMBER	Shipping Latitude										
ShippingLongitud	NUMBER	Shipping Longitude										
ShippingCongrade	Accuracy PICKLIST	Shipping Congredee Shipping Geocode Accuracy										
Shipping&ddress	ALITO NUMBER	Shipping Address										
Phone	PHONE											
Fax	PHONE	Account Fax			Expression	1						
	TEVT	Account Number										
Website	LIDI	Website										
Photol Irl	LIDI	Photo LIPI		Т								
Sic	TEYT	SIC Code										
Industry	PICKLIST	Industry		J.								
				•								
NumberOffmole		Employees										
	ees AUTO NUMBER	Linpioyees	14									

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

rch here				Ger	neral Des	cription	Requirements Cus	stom metad	data					
K FK Field name	Field type	Label	^											
TickerSymbol	TEXT	Ticker Symbol			Primary ke	y	Required		Inique				~	Visible
Description	TEXT AREA (LO	NG Account Description												
Rating	PICKLIST	Account Rating			hol	Field 1			Manua	ETELD 1				
Site	TEXT	Account Site		La	ibei	reid_1			Name	100_1				
CurrencyIsoCode	PICKLIST	Account Currency												
OwnerId	LOOKUP	Owner ID						_						
CreatedDate	DATETIME	Created Date		Da	ata type	TEXT		\sim	Size	255	Sca	le		÷
CreatedById	LOOKUP	Created By ID												
LastModifiedDate	DATETIME	Last Modified Date		Apply of	nanges									
LastModifiedById	LOOKUP	Last Modified By ID		De	efault value				Data sensitivity	1				
SystemModstamp	DATETIME	System Modstamp							level					
LastActivityDate	DATE	Last Activity												
LastViewedDate	DATETIME	Last Viewed Date		Dr	ta owner				Field usage					
LastReferencedDat	e DATETIME	Last Referenced Date		00					i ielu usage					
Jigsaw	TEXT	Data.com Key												
JigsawCompanyId	TEXT	Jigsaw Company ID												
CleanStatus	PICKLIST	Clean Status		Co	ompliance	1			Help text	1				
AccountSource	PICKLIST	Account Source			ategorization									
DunsNumber	TEXT	D-U-N-S Number												
Tradestyle	TEXT	Tradestyle												
NaicsCode	TEXT	NAICS Code												
NaicsDesc	TEXT	NAICS Description	_											
YearStarted	TEXT	Year Started												
SicDesc	TEXT	SIC Description												
DandbCompanyId	LOOKUP	D&B Company ID												
OperatingHoursId	LOOKUP	Operating Hour ID		F	voression	1								
CustomerPriority_	c PICKLIST	Customer Priority			nya waanan I	1								
SLA_c	PICKLIST	SLA												
Activec	PICKLIST	Active		^										
NumberofLocations	c NUMBER	Number of Locations		- T										
UpsellOpportunity_	_c PICKLIST	Upsell Opportunity		J.										
SLASerialNumber	c TEXT	SLA Serial Number		•										
SLAExpirationDate	_c DATE	SLA Expiration Date												
FIELD_1	TEXT	Field_1	×											

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

🙏 Object : Account/Account													- 1		×
Object Fields Validation rules	iriggers De	escription Requirements Cus	tomme	etadata											_
Search here				- 1 1	General Des	cription	Requirements Custo	om metao	lata			Op	en in br	owser	⊕
PK FK Field name	Field type	Label	^	Τ.											
Id	ID	Account ID			Primary ke	v	Required	Πu	Inique					Visit	ole
IsDeleted	CHECKBOX	Deleted		_											
MasterRecordId	LOOKUP	Master Record ID			Label	Account	t Namo			Namo					
Name	TEXT	Account Name			Label	Accourt	c ivallie		Name	INGINE					_
Type	PICKLIST	Account Type													
RecordTypeId	LOOKUP	Record Type ID		Edi	it field										_
ParentId	LOOKUP	Parent Account ID		_	Data type	TEXT		\sim	Size	255	‡ S	cale			\$
BillingStreet	TEXT AREA	Billing Street													
BillingCity	TEXT	Billing City													
BillingState	TEXT	Billing State/Province			Default value				Data sensitivity						
BillingPostalCode	TEXT	Billing Zip/Postal Code							level						- 1
BillingCountry	TEXT	Billing Country													
BillingLatitude	NUMBER	Billing Latitude							E. H.						- I
BillingLongitude	NUMBER	Billing Longitude			Data owner				Field usage						_
BillingGeocodeAccuracy	PICKLIST	Billing Geocode Accuracy													
BillingAddress	AUTO NUMBER	Billing Address													
ShippingStreet	TEXT AREA	Shipping Street			Compliance	1			Help text	1					
ShippingCity	TEXT	Shipping City			Categorization										
ShippingState	TEXT	Shipping State/Province													
ShippingPostalCode	TEXT	Shipping Zip/Postal Code													
ShippingCountry	TEXT	Shipping Country													
ShippingLatitude	NUMBER	Shipping Latitude													
ShippingLongitude	NUMBER	Shipping Longitude													
ShippingGeocodeAccuracy	PICKLIST	Shipping Geocode Accuracy													
ShippingAddress	AUTO NUMBER	Shipping Address													
Phone	PHONE	Account Phone													
Fax	PHONE	Account Fax			Expression	1									
AccountNumber	TEXT	Account Number													
Website	URL	Website													
PhotoUrl	URL	Photo URL		1.1											
Sic	TEXT	SIC Code		1.1											
Industry	PICKLIST	Industry		•											
AnnualRevenue	CURRENCY	Annual Revenue													
NumberOfEmployees	AUTO NUMBER	Employees	\checkmark												
												OK		Cancel	

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 <u>requirement</u> 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:

A Obje	ect : Account/Account	Triggers De	escription Requirements Cust	omme	etadata							_	o x
Search he	re			_									
DV EV	Field name	Field type	Label		+	General Desc	ription	Requirements Custo	m metadata			Open in bi	owser
	Telu fidirie	Tield type	Account ID										Dis 11
	IsDeleted	CHECKBOX	Deleted		—	Primary key		Required					VISIDIE
	MasterRecordId	LOOKUP	Master Record ID										
	Name	TEXT	Account Name		Del	ete field	Account	t Name	Name		Name		
	Type	PICKLIST	Account Type		-								
	RecordTypeId	LOOKUP	Record Type ID										
	ParentId	LOOKUP	Parent Account ID			Data type	TEXT		 ✓ Size 		255 \$ Scale		\$
	BillingStreet	TEXT AREA	Billing Street				-						
	BillingCity	TEXT	Billing City										
	BillingState	TEXT	Billing State/Province			Default value			Data :	sensitivity	/		
	BillingPostalCode	TEXT	Billing Zip/Postal Code						level				
	BillingCountry	TEXT	Billing Country										
	BillingLatitude	NUMBER	Billing Latitude										
	BillingLongitude	NUMBER	Billing Longitude			Data owner			Field L	usage			
	BillingGeocodeAccuracy	PICKLIST	Billing Geocode Accuracy										
	BillingAddress	AUTO NUMBER	Billing Address										
	ShippingStreet	TEXT AREA	Shipping Street			Compliance	1		Help t	ext	1		
	ShippingCity	TEXT	Shipping City			Categorization							
	ShippingState	TEXT	Shipping State/Province										
	ShippingPostalCode	TEXT	Shipping Zip/Postal Code										
	ShippingCountry	TEXT	Shipping Country										
	ShippingLatitude	NUMBER	Shipping Latitude										
	ShippingLongitude	NUMBER	Shipping Longitude										
	ShippingGeocodeAccuracy	PICKLIST	Shipping Geocode Accuracy										
	ShippingAddress	AUTO NUMBER	Shipping Address										
	Phone	PHONE	Account Phone			Expression	1						
	Fax	PHONE	Account Fax			and a second sec	1						
	AccountNumber	IEXT	Account Number										
	Website	URL	Website		1								
	PhotoUri	URL	Photo UKL										
	SIC .	IEAI DIGKI IST	SIC CODE		T								
	AppusDovenue	CURRENCY	Appust Povopuo		*								
	Armuaikevenue NumberOfEmployees		Employees										
	number of Employees	ACTO NUMBER	спроусса	1.4									
											ОК		Cancel

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.

▲ Object : Account/Account		- D X
Search here		A
Validation rule name	General Description Requirements Custom metadata	open in browser 🕁
Shipping Zip Code	Labol Shinning Zin Code	
US Phone Number		
Annual Revenue Range	Name Shipping 7in Code	
· · · · · · · · · · · · · · · · · · ·		
	Active	
	Implementation	
	1 AND (^
	2 OR (ShippingCountry = "USA", ISBLANK (ShippingCountry)),	
	3 OR (
	4 AND(LEN(ShippingPostalCode) <>5,	
	5 LEN(ShippingPostalCode) <> 10),	
	6 NOT (CONTAINS ("0123456789",	
	7 LEFT (ShippingPostalCode, 1))),	
	8 NOT (CONTAINS ("0123456789",	
	9 MID(ShippingPostalCode , 2, 1))),	
	10 NOT (CONTAINS ("0123456789",	
	<pre>11 MID(ShippingPostalCode , 3, 1))),</pre>	
	12 NOT (CONTAINS ("0123456789",	
	13 MID(ShippingPostalCode, 4, 1))),	
	14 NOT (CONTAINS ("0123456789",	
	15 MID(ShippingPostalcode, 5, 1))),	
	17 IEN(ShippingBogtalCode) = 10	
	18 OP (<u> </u>
	Error message	
	1	
	Error location	
~		
		OK Canad
		UK Cancel

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 <u>requirements</u>.

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.

A Object : Account/Account	– D X
Object Fields Validation rules Triggers Description Require	ments Custom metadata
Search here Trigger name	General Requirements Custom metadata Open in browser
Trigger name TError HelloWorld7 HelloWorld1 CaloutTrigger Accountbelton AddRelatedRecord	Label AccountDeletion Name AccountDeletion Namespace Prefix
	OK Cancel

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 <u>requirements</u>.

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 <u>requirements</u> to learn more about how to create them.

🙏 Apex classes	- 🗆 X
Search here Name A	General Requirements Custom metadata
MySampleApexClass	Caption MySampleApexClass Name MySampleApexClass Namespace Prefix Status Api Version Implementation 1 public class MySampleApexClass { //Class definition and body 2 public static Integer myValue = 0; //Class Member variable 3 public static String myString = ''; //Class Member variable 4 public static Integer getCalculatedValue () { 6 // Method definition and body 7 // do some calculation 8 myValue = myValue+10; 9 return myValue; 10 }}
Ý	< > > OK Cancel

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".

A Requirements		- D X
Search here	General Rela	ted objects Related fields Related triggers Related validation rules Related relationships Related apex classes
Title ^	ID	1
	Code	[code_1
	✓ Title	
	× Date	
	Risk	Medium V
	Category	sample_category
	Description	Tahoma \bigvee 10 \bigvee B \checkmark U \bigotimes 1 \boxtimes 1 1 \boxtimes 1 1 1 $:=$ 1
		Lorem Ipsum "Neque porro quisquam est qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit" "There is no one who loves pain itself, who seeks after it and wants to have it, simply because it is pain"
	^	Lorem ipsum dolor sit amet, consectetur adipiscing elit. Sed suscipit elit vel tellus accumsan porta. Aenean maximus aliquet ullamcorper. Maecenas sodales a massa et suscipit. Donec dapibus justo sed purus mollis iaculis. Proin scelerisque commodo nisl. Quisque elit ex, consequat in consectetur sit amet, luctus non erat. Integer a pulvinar leo.
~	*	· · · · · · · · · · · · · · · · · · ·
		OK Cancel

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:

A Requirements			
Search here	General Related objects Related fields Related triggers Related validation	tion rules Related relationships Related apex classes	
litte			
_	Objects	Selected	
	Search here	Object label	^
· · · · · · · · · · · · · · · · · · ·	Object label	Account Asset Action	
	Account	Asset Action Source	
	allTypes		
	Alternative Payment Method		
	Appointment Topic Time Slot		
	Asset Action		
	Asset Action Source		
	Authorization Form	E State S	
	Authorization Form Consent		
	Authorization Form Data Use		
	Campaign		
	Call Center		
1			
	· · · · · · · · · · · · · · · · · · ·		~
↓ ↓			
< >			
		ОК	Cancel

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.

	Field name	Field type	Label	^	- T							
I	ł	ID	Account ID			Requirements					Selected	
Is	Deleted	CHECKBOX	Deleted		_					-		
M	lasterRecordId	LOOKUP	Master Record ID			Search here					Search here	
N	ame	TEXT	Account Name			Code			Title ^		Title	
_ T	ype	PICKLIST	Account Type			code_1	Rec	quirement_2			Requirement_2	
Z P	arentId	LOOKUP	Parent Account ID			code_2	Rec	quirement_1				
В	illingStreet	TEXT AREA	Billing Street									
В	illingCity	TEXT	Billing City									
В	illingState	TEXT	Billing State/Province							l →		
В	illingPostalCode	TEXT	Billing Zip/Postal Code							1		
B	illingCountry	TEXT	Billing Country							←		
B	illingLatitude	NUMBER	Billing Latitude									
В	illingLongitude	NUMBER	Billing Longitude									
В	illingGeocodeAccuracy	PICKLIST	Billing Geocode Accuracy									
В	illingAddress	AUTO NUMBER	Billing Address									
S	hippingStreet	TEXT AREA	Shipping Street									
S	hippingCity	TEXT	Shipping City									
S	hippingState	TEXT	Shipping State/Province									
S	hippingPostalCode	TEXT	Shipping Zip/Postal Code									
S	hippingCountry	TEXT	Shipping Country									
S	hippingLatitude	NUMBER	Shipping Latitude									
S	hippingLongitude	NUMBER	Shipping Longitude									
S	hippingGeocodeAccuracy	PICKLIST	Shipping Geocode Accuracy									
S	hippingAddress	AUTO NUMBER	Shipping Address									
P	hone	PHONE	Account Phone									
F	ax	PHONE	Account Fax									
A	ccountNumber	TEXT	Account Number									
V	/ebsite	URL	Website		•							
P	hotoUrl	URL	Photo URL		- 1 - E							
S	ic	TEXT	SIC Code									
Ir	ndustry	PICKLIST	Industry		$\mathbf{\Psi}$				¥			
	nnualRevenue	CURRENCY	Annual Revenue			<			>			
A	1	AUTO NUMBER	Employees	\sim								

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.

ol
Cancel
to Cance

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.

A Requirements			- 0	×
Search here		General F	elated objects Related fields Related triggers Related validation rules Related relationships Related apex classes	
Search here Title Requirement_1 Requirement_2	+	General F ID Pelete requirer Title Date Source Risk	Image: Selated Fields Related triggers Related validation rules Related relationships Related apex classes Image: Selated fields Requirement_1 Image: Selated fields Image: Se	
۲ کې	↑ ↓	Category Description	Tahoma 12 B II III IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	- A

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".

Pro	oject	Diagram	Repository					
	Ар	ex classes	Ctrl+Alt+R					
	Rec	Requirements						
	Custom metadata							
	Project properties							

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.

					-		×
Search here		General	Description				
Label ^ I Lead_marketing_channel		Label Lead_	marketing_channel				
	~	Type Picklis	st				~
	×	Pick lis Emai pay- Soci	tvalues (separated 1 marketing, per-click, al media,	with comma ',')			< >
			/ / /alidation rules	Fields	 □ Trig □ Rela	gers ationships	
	↑ ↓						
•							

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"**.

🛕 Object : Account/Account			\times
Object Fields Validation rules	Triggers Description Requirements Custom metadata	 	
Object Fields Validation rules	Trigges Description Requirements Custom metadata mail_marketing	Cance	
	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.

\lambda Custom metadata			– 🗆 X
Custom metadata Search here Label Lead_marketing-channel		General Description Label Lead_marketing-channel Type Type Title Custom metadata Picklist values (separated with comma',') email_marketing, pay_per-click, social_media, others Visibility	~ ~ ~
	↑ ↓	Objects ✓ Fields ✓ Validation rules Apex classes	☐ Triggers ☐ Relationships
· · · · · · · · · · · · · · · · · · ·			OK Cancel

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.

🛕 Custom metadata					_		×
Search here Label Lead_marketing-channel	+ -	General Description Label Lead_marketing-channel lete custom metadata Picklist Picklist Picklist values (separated wit email_marketing, pay_per-click, social_media, others	h comma ',')				~
	↑ ↓	Visibility	Fields	\$	☐ Trigg ☐ Relat	jers tionships	
×				ОК		Cance	el

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.

Find	d in diagram		×
0	bject: Account		
	Diagram All Items		
)	Diagram 1 Diagram 2		
		ОК	Cancel

Available in: Standard, Professional and Enterprise Editions

Finding objects

To find an object:

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

Too	ols	Help	
	С	ompare	
	U	pdate model from Salesforce o	rg
	G	enerate model documentation	
	G	enerate data dictionary	
	S	alesforce to DBMS DDL script	Ctrl+G
	F	ind	Ctrl+F
	0	ptions	

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.

Find	×
Find : Lead ~	Scope Scope Scope Scope Scope Relationships Scope Relationships Scope Scope Relationships Scope Sc
	Ok Cancel

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

Found 51
1: "Lead [Found in object "lead"] (Name)
2: "Lead [Found in object "lead"] (Label)
3: "fk_CampaignMember_Lead_LeadId [Found in relationship "lead"] (ConstraintName)
4: "fk_CampaignMember_Account_LeadOrContactId [Found in relationship "leadorcontactid"] (ConstraintName)
5: "fk_CampaignMember_Contact_LeadOrContactId [Found in relationship "leadorcontactid"] (ConstraintName)
6: "fk_CampaignMember_Lead_LeadOrContactId [Found in relationship "leadorcontactid"] (ConstraintName)
7: "fk_CampaignMember_User_LeadOrContactOwnerId [Found in relationship "leadorcontactowner"] (ConstraintName)
8: "fk_ContactRequest_Lead_WhoId [Found in relationship "who"] (ConstraintName)
9: "fk_ContentVersion_Lead_FirstPublishLocationId [Found in relationship "firstpublishlocation"] (ConstraintName)
General Reverse engineer
DB : salesforce

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

Data model br	owser				Ę		
€) Object	User			~	1		
		Children	COUNT 12:	,			
Display objects	Parents and chi	ildren	~				
Search							
Advanced sea	rch	Clear se	earch				
Object Label		Parents	Children	Object Name	^		
Account		4	42	Account			
Alternative Pa	yment Method	3	0	AlternativePaymentMethod			
Announcemen	t	2	1	Announcement			
API Anomaly E	vent Store	1	2	ApiAnomalyEventStore			
Asset		5	11	Asset			
Asset Action		2	1	AssetAction			
Asset Action S	ource	3	0	AssetActionSource			
Asset File		2	3	ContentAsset			
Asset Relation	ship	2	4	AssetRelationship			
Asset State Pe	eriod	2	0	AssetStatePeriod			
Assigned Reso	urce	4	4	AssignedResource			
Associated Loc	ation	3	0	AssociatedLocation			
Authorization F	Form	2	2	AuthorizationForm			
Authorization F	Form Consent	6	0	AuthorizationFormConsent			
Authorization F	Form Data Use	3	0	AuthorizationFormDataUse			
<					2		
Relationships	In diagram						
Name					^		
All Items							
Sales							
					~		
<<		Hide	biects in	diagram			
			ojecto inte	anagram			

\odot	The Previous/Next buttons allow the navigation up		
	and down on your exploration process.		
Object 🗸 🗸	Search and select an object to explore.		
1	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.		

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

Data model browser					早		
€) Object User				~ /	,		
Parents count 7 Children count 129							
Display objects Parents a	Display objects Parents and children						
Search							
Advanced search		Clear se	arch				
Object Label		Parents	Children	Object Name	^		
Account		4	42	Account			
Alternative Payment Me	thod	3	0	AlternativePaymentMethod			
Announcement		2	1	Announcement			
API Anomaly Event Store	2	1	2	ApiAnomalyEventStore			
Asset		5	11	Asset	_		
Asset Action		2	1	AssetAction	_		
Asset Action Source		3	0	AssetActionSource	_		
Asset File		2	3	ContentAsset	_		
Asset Relationship		2	4	AssetRelationship	_		
Asset State Period		2	0	AssetStatePeriod	_		
Assigned Resource		4	4	AssignedResource	_		
Associated Location		3	0	AssociatedLocation	_		
Authorization Form		2	2	AuthorizationForm	_		
Authorization Form Cons	ent	6	0	AuthorizationFormConsent	_		
Authorization Form Data	Use	3	0	AuthorizationFormDataUse			
<				:	×		
Relationships In diagr	am						
Name					^		
All Items							
Sales							
					~		
<<			biocto in .	diagram			
			ojects in (ulayi dili			

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.

Data model browser				早			
Object Account			~ /				
Parents count 4 Children count 42							
Display objects Parents and children 🗸							
Search							
Advanced search							
Object Label	Parents	Children	Object Name	^			
Account	4	42	Account				
Alternative Payment Method	3	0	AlternativePaymentMe				
Asset	5	11	Asset				
Associated Location	3	0	AssociatedLocation				
Authorization Form Consent	6	0	AuthorizationFormCons				
Campaign Member	5	0	CampaignMember				
Card Payment Method	3	1	CardPaymentMethod				
Case	7	8	Case				
Communication Subscription Co	8	5	CommSubscriptionCons				
Contact	4	22	Contact				
Contact Point Address	4	2	ContactPointAddress				
Contact Point Email	3	2	ContactPointEmail				
Contact Point Phone	3	3	ContactPointPhone				
Contact Request	7	3	ContactRequest				
Content Version	60	2	ContentVersion				
<			>	Ť			
Relationships In diagram				_			
Label				^			
fk_Asset_Account_AccountId							
fk_Asset_Account_AssetServicedById							
fk_Asset_Account_AssetProvidedById							
				~			
< Hide objects in diagram							

• 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".

Data model browser				早		
€ ⊖ Object User			~ /	•		
Parents count 7 Children count 129						
Display objects Parents and children						
Search						
Advanced search	Clear se	arch				
Object Label	Parents	Children	Object Name	^		
Account	4	42	Account			
Alternative Payment Method	3	0	AlternativePaymentMethod			
Announcement	2	1	Announcement			
API Anomaly Event Store	1	2	ApiAnomalyEventStore			
Asset	5	11	Asset			
Asset Action	2	1	AssetAction			
Asset Action Source	3	0	AssetActionSource			
Asset File	2	3	ContentAsset			
Asset Relationship	2	4	AssetRelationship			
Asset State Period	2	0	AssetStatePeriod			
Assigned Resource	4	4	AssignedResource			
Associated Location	3	0	AssociatedLocation			
Authorization Form	2	2	AuthorizationForm			
Authorization Form Consent	6	0	AuthorizationFormConsent			
Authorization Form Data Use	3	0	AuthorizationFormDataUse			
<			1	×		
Relationships In diagram						
Name				^		
All Items						
Sales						
				~		
< < Hide objects in 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.

AbstraLinx User Guide v3 Abstral.inx - Enterprise Edition - Trial [salesforce org][F:\salesforce org\salesforce org.ERB] - [Project330] File Edit Project Repository Database Tools Help ٥ × _ 8 × १) == =| |= = = | × | 🖪 ທ໙ | 🗙 == = | €, €, 0 | = = = | 🗞 🥑 = | 🐄 🕑 Data model browser All Items × Sales Marketing Workspace Project350 Diagrams All Items Marketing Sales € ∋ Object Account ~/ Parents count 4 Children count 42 Marketing Sales Objects Alternative Payment Method Annouccement API Anomaly Event Store Application Asset Asset Action Asset Asset Action Source Asset File Asset Action Source Asset State Period Campaign Amount State Campaign Campaign Member Campaign Member Campaign Member Communication Subscription Communication Subscription Chai Communication Subscription Chai Communication Subscription Timi * Communication Subscription Timi * ID ID OHECKBOX LOOKUP TEXTI253 PICKLIST LOOKUP TEXTI253 TEXTI40 TEXTI20 TE Alternative P Owner ID Deleted Alternative P Created By ID Last Modified System Mode Last Viewed Last Viewed Last Referen Payment Gat Display objects Parents and children AUTO NUM DATETINE DATETINE DATETINE DATETINE DATETINE TEXT(80) LOCADUSENT AUTO NUMBER UNTO NUMBER DATETIME LOCKUP DATETIME DATE DATETIME D Event Name Created Data Last Modifie System Mod Last Viewet Last Refere Event D User ID User ID User ID User ID User ID User ID Source IP Antro Youc Event Data Esssion Key Source IP Antro Youc Source IP Source IP Antro Youc Source IP Sourc AppNenult Applicatio Name Descriptio Developer User Sort Sort Order App Type Logo Imag Icon Uri Info URL Start Uri Mobile Che Search ing City Ing State/Province Ing Zip/Postal Code Ing Country Advanced search Clear search TEXT(80) LOOKUP TEXT(255) DATETINE TEXT(24) TEXT(24) TEXT(25) Object Label Account Alternative Payment Method Asset Associated Location Authorization Form Consent Campaign Member Card Payment Method Case Ing Latitude Ing Longitu Ing Geocod Ing Address Ing Street LOOKUP PICKLIST NUMBER(18,0 TEXT(256) NUMBER(18,0 NUMBER(18,0 NUMBER(18,0 NUMBER(18,0 NUMBER(18,0 NUMBER(18,0 TEXT AREA (TEXT AREA (0 11 UMBER(3,15) UMBER(3,15) ICKLIST O NU NE NE T(40) 0 Coun Lathu Long GeoC Payn PHONE TEXT(40) URL URL URL TEXT(20) PICKLIST TEXT(20) PICKLIST TEXT(20) TEXT ARE PICKLIST TEXT(20) DATETHIE DATETHIE DATETHIE DATETHIE DATETHIE DATETHIE TEXT(20) TEX Card Payment Method Case Communication Subscription Conse Contact Contact Point Address Contact Point Email Contact Point Phone Contact Request Content Version 22 2 3 3 2 Lest Modified System Hodst Lest Activity Lest Reference Deta.com Key Jipsaw Comp Clean Status Account Sour D-U-N-S Numt Tradestyle NAIOS Code NAIOS Code NAIOS Code SIC Descripti D&B Compan < > Consumption Owner ID Deleted Consumption Created By ID Last Modified Last Modified Last Modified Last Modified Last Modified Last Moved I Last Reterent Active Description Billing Term I Billing Term I AUTO NUME DATETINE LOOKUP DATETINE LOOKUP DATETINE LOOKUP CURRENCY CURRENCY CURRENCY CURRENCY CURRENCY DATETINE DATETINE Relationships In diagram LOCKUP CHECKBOX TEXT(255) DATETINE LOCKUP DATETINE DATETINE DATETINE CHECKBOX TEXT AREA AUTO NUME PICKLIST Label ► fk: A fk_Account_Account_ParentId D&B Company ID Operating Hour ID Customer Priority SLA << Hide objects in diagram < > < DB : sale

>>

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

on the left bottom of the browser

A Abstraliny - Enterprise Edition (Saledones data model uSI)(EAAAS-steefages (Arab Saledones data model uSI) Saledones data model uSI)								
A Australian - Enterprise Calculut patestorice data inforte virgit, introduce virgitalestorice data induce virgitalestorice data								
	X 100 127							
Data model browser								
() Object Account					~ /			
	olil i as				/			
Parents count 4		4						
Display objects Parents and child	ren				~			
Search					0			
Advanced search	Clear search							
Object Label	Parents Child	fren Object Name	Description	Comment	^			
Account	4	42 Account	Represents an individual account, which is an organization or person involved with your	This is a comment				
Alternative Payment Method	3	0 AlternativePaymentMethod						
Asset	5	11 Asset	Represents an item of commercial value, such as a product sold by your company or a c	x				
Associated Location	3	0 AssociatedLocation						
Authorization Form Consent	6	0 AuthorizationFormConsent						
Campaign Member	5	0 CampaignMember						
Card Payment Method	3	1 CardPaymentMethod	References a credit card or debit card payment method. This entity implements the Pay	r				
Case	7	8 Case	Represents a case, which is a customer issue or problem.					
Communication Subscription Con	ise 8	5 CommSubscriptionConsent						
Contact	4	22 Contact						
Contact Point Address	4	2 ContactPointAddress						
Contact Point Email	3	2 ContactPointemail			*			
Relationships In diagram								
Label					^			
fk_Account_Account_MasterRe	cordId							
fk_Account_Account_ParentId								
					~			
>>					Hide objects in diagram			
General Reverse engineer								

• 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.

Advanced Search	_	×
Fields Object Label Object Name Parent count Children count Comment	Object Label Field <u>V</u> alue Asset Clear Search Type	Ok
	Partial Match at Beginning Partial Match Anywhere Case Sensitive	Cancel
All Searched Field Order O Alphabetic O Logical	By <u>V</u> alue By <u>R</u> ange View Summary New Search	

• 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.

Advanced Search	×
Eields Object Label Object Name Parent count Children count Comment	Object Label Field <u>V</u> alue Asset Clear Ok Search Type Exact Match Partial Match at Beginning Partial Match Anywhere Cancel Cancel Case Sensitive
All Searched Field Order	By <u>V</u> alue By <u>R</u> ange View Summary New Search

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

Advanced Search		X
E Show Search Sum	imary	~
c Field	Search Type	Value
Object Label	Partial Match at Beginning	Asset
Children count	By Range	>=1,<=3
F	OK	
Alphabetic	Logical View Sum	mary New 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:

Тос	ols	Help	
	С	ompare	
	U	pdate model from Salesforce of	org
	G	enerate model documentation	I
	G	enerate data dictionary	
	S	alesforce to DBMS DDL script	Ctrl+G
	F	ind	Ctrl+F
	0	ptions	

- 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.

nerate model documentati	on	
General Elements to include Elements details to include	Output : F:\Salesforce org	
	Diagrams : Name ☑ All Items ☑ Diagram_1	

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

rate model documentatio	'n	×
General	> . ✓ Objects	
Elements to include	 > I Relationships > I Triggers 	
ments details to include	> · └ Validation rules > · └ Apex classes > · └ Requirements > · └ Custom metadata	
Sa	eve settings Load settings	OK Cancel

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

Generate model document	ation		>
General Elements to include Elements details to include	 Fields Wame Label Type Required Default values Foreign key Unique Help text Data owner Field usage Data sensitivity level Compliance categorization Expression Custom metadata Description Nelationships Mation rules Mate and the sense Requirements 		
	Save settings OK	Cancel	

• 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:

v	\square	
Ľ,	\square	

• 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)

Save Settings	Load Settings
Save Settings	coud settings

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.

🙏 Compare		-		×
Compare the current m	odel with another			
Project file name	F:\salesforce org\salesforce org.ERB	1		
Compare the current m	odel with a Salesforce Org			
Connection	My_new_org V Connect			
Compare two Salesforce	e Orgs			
Connection 1	ERBuilder4SF \checkmark Connect			
Connection 2	ERBuilder4SF Connect			
	Previous	ext	Close	e

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 <u>"Connections Management"</u>.

👠 Compare		_		×
Compare the current me	odel with another			
Project file name	F:\MySalesforce model\Salesforce model 3\Salesforce model 3.ERB			
Compare the current me	Test senseties to Selections			
Connection	new connection			
Compare two Salesforce	Test connection to Salesforce			
Connection 1	new connection V Connect			
Connection 2	new connection V Connect			
	Previous	ext	Close	*

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.

<u> Compare</u>		-		×
© Compare the current m	odel with another			
Project file name	F: WySalesforce model \Salesforce model 3\Salesforce model 3.ERB			
© Compare the current m	odel with a Salesforce Org			
Connection	Connect			
 Compare two Salesforce 	e Orgs			
Connection 1	new connection V Connect			
Connection 2	Test connection to Salesforce V Connect			
	new connection			
	Previous	ext	Close	:

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 icon⁴. 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".

Compare			
 Diagrams All Items 	Account		
Marketing Sales	Properties	Model 1: Salesforce_data_model_v51	Model 2: Project350
Diagram_1	Name	Account	Account
Dbjects 337	Label	Account	Account
Account Alternative Payment Method	Description	Represents an individual account, which is an organization or person involved with your business (such as customers, competitors, and partners).	
API Anomaly Event Store	Comment	This is a comment	This is a comment
Asset	-		
Asset Action	Fields		
Asset Relationship Authorization Form	Deleted		
Authorization Form Consent	Properties	Model 1: Salesfores data model v51 Model 2: Project350	_

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.

Тос	ls	Help				
	Compare					
	Update model from Salesforce org					
	Generate model documentation					
	G	enerate data dictionary				
	S	alesforce to DBMS DDL script	Ctrl+G			
	F	ind	Ctrl+F			
	0	ptions				

• 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.

A Update model from Salesforce org	- 0	×
Image: Second	Salesforce Org: New connection	^
Shipping_Zip_Code US_Phone_Number > AlternativePaymentMethod > - Announcement > ApiAnomalyEventStore > Asset > Asset > AssetAction > - AssetActionSource > AssetRelationship	Shipping_Zp_Code US_Phone_Number > -A Triggers > -A AternativePaymentMethod > -= Announcement > -A ApiAnomalyEventStore > -A Asset Action > -= AssetAction > -= AssetActionSource > -A AssetRelationship	~
Properties	Salesforce Org	
Object	Account	
Name	Annual_Revenue_Range	
Label Implementation	Annual_Revenue_Range OR(AnnualRevenue < 0, AnnualRevenue > 100000000000)	
Update model	Previous Next Close	

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

🙏 Update model from Salesforce org		_		×
Model: Project 350	Salesforce Ora: New connection			
Objects O	Account Account Account Account Account Account Account Account Annual Revenue_Range Annual Revenue_Range			^
US_Phone_Num > A Triggers > AlternativePaymentMet > Announcement > ApiAnomalyEventStore > Asset Asset > AssetAction	AbstraLinx Leading Metadata Managment Solution			
> -= AssetActionSource > - <u>1</u> AssetRelationship				~
Properties Object	Updating model			
Label				
Implementation	OR(AnnualRevenue < 0, AnnualRevenue > 10000000000)			
Update model	Previous	Next	Clo	se

Available in: Professional and Enterprise Editions

Generate data dictionary

To generate a Data dictionary

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

Тоо	ls	Help				
	С	ompare				
	Update model from Salesforce org					
	G	enerate model documentation				
	G	enerate data dictionary				
	S	alesforce to DBMS DDL script	Ctrl+G			
	F	ind	Ctrl+F			
	C	ptions				

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.

Generate data dictionary			×
Output :			
F:\salesforce org			
Export type :			
● HTML ○ CSV	CSV Separator Comma	✓ Text delimiter *	
Metadata to export :			
Object name	Field name	Field Label	
Field type	☑ Not null	Primary key	
Foreign key	Referenced object	Description	
Options			
Export only visible field	ls		
		OK Cancel	

Salesforce data model $v imes$	+								-	٥
ightarrow O files	:///F:/salesforce%20org/salesforce%20org/Salesf	iorce%20data%20model/datadictionary.ht	ml					ד ≡	1	۵
Data Dictio	onary									
Salestorce	e data model v51									
							Search			<u>a</u> -
Object name		Label	Туре	Size 🕴	Scale 🗧	Required 🔅	PK 🕴	FK 🔅	Refere	encec
			~			~		~		
Account	AccountNumber	Account Number	TEXT	40		False	False	False		
Account	AccountSource	Account Source	PICKLIST			False	False	False		
Account	Active_c	Active	PICKLIST			False	False	False		
Account	AnnualRevenue	Annual Revenue	CURRENCY	18	0	False	False	False		
Account	BillingAddress	Billing Address	AUTO NUMBER			False	False	False		
Account	BillingCity	Billing City	TEXT	40		False	False	False		
Account	BillingCountry	Billing Country	TEXT	80		False	False	False		
Account	BillingGeocodeAccuracy	Billing Geocode Accuracy	PICKLIST			False	False	False		
Account	BillingLatitude	Billing Latitude	NUMBER	3	15	False	False	False		
Account	Pilling opaitude	Rilling Longitudo	NUMBED	2	15	Ealso	Ealso	Ealso		

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".

Тоо	ls	Help				
	Compare					
	Update model from Salesforce org					
	Generate model documentation					
	G	enerate data dictionary				
	S	alesforce to DBMS DDL script	Ctrl+G			
	Fi	ind	Ctrl+F			
	0	ptions				

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.

A Generate DDL script -	_		×
Settings Preview			
DBMS: MS SQL Server 2019 V			
Show descriptions			
Save to file File name F:\salesforce org\Salesforce to ms sql server2019.sql			
Objects			
Generate DDL script		Cancel	

Å Gen	erate DDL Script		-		×
Settings	Preview				
1	/*		*	1	^
2	/* DBMS: MS SQL Server 2019*/				
3	/* Created on : 10/04/2020 15:	51:37	*	1	
4	/*=====================================		****	1	
5					
6					
7	/*=====================================		*====*		
8	/*	TABLES	*		
10	CREATE TABLE [Account] (*		
11	[Id]	VARCHAR (18) NOT NULL.			
12	[IsDeleted]	BIT DEFAULT false NOT NULL.			
13	[MasterRecordId]	VARCHAR (18),			
14	[Name]	VARCHAR(255) NOT NULL,			
15	[Type]	VARCHAR (255),			
16	[ParentId]	VARCHAR (18),			
17	[BillingStreet]	VARCHAR (255),			
18	[BillingCity]	VARCHAR (255),			
19	[BillingState]	VARCHAR (255),			
20	[BillingPostalCode]	VARCHAR (255),			
21	[BillingCountry]	VARCHAR (255),			
22	[BillingLatitude]	DECIMAL(3,15),			
23	[BillingLongitude]	DECIMAL(3,15),			
24	[BillingGeocodeAccuracy]	VARCHAR (255),			
25	[BillingAddress]	VARCHAR(30),			
26	[ShippingStreet]	VARCHAR (255),			
27	[ShippingCity]	VARCHAR (255),			
28	[ShippingState]	VARCHAR (255),			
29	[ShippingPostalCode]	VARCHAR (255),			
30	[ShippingCountry]	VARCHAR (255),			
31	[ShippingLatitude]	DECIMAL(3,15),			
32	[ShippingLongitude]	DECIMAL(3,15),			
33	[ShippingGeocodeAccuracy]	VARCHAR (255),			×
	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.

🛕 Git		Х
Remote repository	https://github/Softbuilder/AbstraLinx_repository \sim	
Email	team@soft-builder.com	
Name	User01	
Git client	C:\Program Files\Git\bin\git.exe	
Branch	master	
	OK Cancel	

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"**.

🙏 Save to repository		_		×
Image: Constraint of the second se	Image: Second			
Properties	Local project			^
Diagram	All Items			
Object	OBJECT1			
Тор	100			
Left	260			
Height	80			
Width	150			
HeaderColor				
HeaderFont	Name:Consolas - Size: 12 - Style: [Bold] - Color:White			
BodyColor				~
<				>
Save to repository			Close	2

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.

Save to remote repository	×
Commit message	
Added a new object "Object1"	
OK	Cancel

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.

Save to remote repository			×
Commit message Added a new object "Obj	Information Project saved succesfully	×	
		ОК	Cancel

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"**.

🙏 Refresh model			_		×
Image: Constraint of the second se	P ○ ₽ □ rce_data_model_v51	Repository project: Salesforce_data_model_v51			
Properties Object Data Type Primary Key	Local project OBJECT5 ID True				
Label Required Visible	Object5_ID True True				
Update model				Close	e

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).

🙏 Ve	rsions				- 🗆 X
#	Hash	Author name	Author email	Commit date	Commit message
9	f4ab886	softbuilder3	softbuilder3@gmail.com	2021-11-08 19:56:19 +0100	Move some objects and relationships
8	4d 1b 26 1	softbuilder3	Move some objects and relationship	2021-11-08 19:31:49 +0100	add object5
7	12ab7f8	softbuilder2	sales@soft-builder.com	2021-11-08 19:10:23 +0100	add object4 PC2
6	450270b	softbuilder2	sales@soft-builder.com	2021-11-08 18:50:55 +0100	repoitionner les objects
5	bd 1dbea	softbuilder2	sales@soft-builder.com	2021-11-08 18:48:07 +0100	Added object3
4	94c4444	softbuilder2	sales@soft-builder.com	2021-11-08 18:41:17 +0100	Added a second object object2
3	f1a071f	softbuilder2	sales@soft-builder.com	2021-11-08 17:55:07 +0100	Added a new object Object1
2	17cfccf	softbuilder2	89523717+softbuilder2@users.noreply.	2021-11-08 17:38:43 +0100	Rename Salesforce data model v51.ERB to
1	da4d1b2	softbuilder2	sales@soft-builder.com	2021-10-25 12:14:13 +0100	Save the new Salesforce project
Cor	npare	Merge Open			Close

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.

A Compare	– 🗆	×
Image: Constraint of the second state of the second sta	Repository project: Salesforce_data_model_v51 Diagrams All Items All Items All All tems Advantation Advantation Fields	^
 > = Validation rules > = Triggers > = AlternativePaymentMethod > = ApiAnomalyEventStore > = Asset > = AssetAction > = AssetActionSource > = AssetRelationship 	 Validation rules Triggers AlternativePaymentMethod Announcement ApiAnomalyEventStore Asset Asset AssetAction AssetActionSource AssetRelationship 	~
Properties Local project	Repository project	
Label Account	Account	
Generate Report	Close	

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"**.

\lambda Merge models			_		Х
(€) (€) (●) (●) (●) Local project: Salesfo > · ▲ Diagrams > · ▲ All Items > · ▲ All All All > · ▲ Objects > · ▲ OBJECT4 ● Fields ■ Fields ■ Triggers > · ● OBJECT5 = Relationships = Apex classes = Requirements	n rules	tory project: Salesforce_data_model_v51 Jiagrams All Items Marketing Sales Dbjects OBJECT4 Fields Triggers OBJECT5 Relationships Apex classes Requirements		_	
Properties	Local project				
Object	OBJECT4				
Data Type	ID				
Primary Key	True				
Name	Id				
Label	Object4_ID				
Required	True				
Visible	True				
Update model				Close	•

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.

🔥 Ve	rsions				- 🗆 X
#	Hash	Author name	Author email	Commit date	Commit message
9	f4ab886	softbuilder3	softbuilder 3 @gmail.com	2021-11-08 19:56:19 +0100	Move some objects and relationships
8	4d1b261	softbuilder3	Move some objects and relationship	2021-11-08 19:31:49 +0100	add object5
7	12ab7f8	softbuilder2	sales@soft-builder.com	2021-11-08 19:10:23 +0100	add object4 PC2
6	450270b	softbuilder2	sales@soft-builder.com	2021-11-08 18:50:55 +0100	repoitionner les objects
5	bd 1dbea	softbuilder2	sales@soft-builder.com	2021-11-08 18:48:07 +0100	Added object3
4	94c4444	softbuilder2	sales@soft-builder.com	2021-11-08 18:41:17 +0100	Added a second object object2
3	f1a071f	softbuilder2	sales@soft-builder.com	2021-11-08 17:55:07 +0100	Added a new object Object1
2	17cfccf	softbuilder2	89523717+softbuilder2@users.noreply.	2021-11-08 17:38:43 +0100	Rename Salesforce data model v51.ERB to
1	da4d1b2	softbuilder2	sales@soft-builder.com	2021-10-25 12:14:13 +0100	Save the new Salesforce project
Cor	mpare	Merge Open			Close

Available in: Enterprise Edition.

Versions management

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

1. Click on "File | Manage Versions":

File	Edit	Project	Diagram	Repositon
	New p	roject		Ctrl+N
	Open	project		Ctrl+O
	Recen	t projects		•
	Close	project		Ctrl+F4
	Save			Ctrl+S
	Save a	s	C	Ctrl+Alt+S
	Manag	ge version	IS	
	Manag	ge connec	tions C	trl+Alt+C
	Page s	etup		
	Previe	w/print		Ctrl+P
	Export	as image		
	Exit			Alt+F4

- 2. In the "Archive Version" window, click on "Archive"
- 3. Specify a name and a comment for the version:

Manage Ver	sions	×
# 1	lame	Creation Date
1 5	alesforce model, instance1	02/04/2020 23:28:38
Name	Salesforce model, instance 1	
Comment		
	Archive Restore Delete	OK Cancel

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".

Manage Ve	ersions	×
#	Name Creation Date	
1	Salesforce model, instance 1 02/04/2020 23:28:	38
News	Colorform model instance (
Name		
Comment	· · · · · · · · · · · · · · · · · · ·	
	Archive Restore Delete OK	Cancel

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.

Options				×
General				
Diagrams	-Display Theme	White ~		
Objects	_Icon style			
Relationships	Iat	Classic		
	Icon size			
	© 32x32	16x16 16x16		
	Environment			
	Auto load last project			
	Working directory	C:\Documents\AbstraLinx\Projects\		
	Default		OK Cancel	

General tab

This tab contains two sections: Display and Environment

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

Theme Icon style	White Black Blue Gray Silver		
Icon size	Default White		
32x32		◎ 16x16	

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

		AbstraLinx User Guide v3	
play			
Theme	White	\sim	
Icon Style			
Flat		Classic	
Icon Size			
32x32		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.

Auto load last project	
Working directory C:\Documents\AbstraLinx\Projects\	

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.

Options			×
General			
Diagrams	Background color 🗌 White 🗸 🗸]	
Objects Relationships	Diagram notation Conceptual (Crow's Foot) Conceptual (Crow's Foot) □Display objects st Relational CODASYL Grid Show grid	Snap to grid	
L]	Default		OK Cancel

Available in: Standard, Professional and Enterprise Editions

Objects tab

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

Options				×
General				
Diagrams	Display fields level	All fields $\qquad \lor$		
Objects	Auto size objects	Display footer		
Relationships	Display data types			
	Open object properties after	object creation		
	Default title font			
	Default body font	ID INTEGER		
	Default title background color			
	Default body background color			
	Default		ОК	Cancel

- **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 title font

• **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 body font ID INTEGER

• **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 title background color

• **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:

Options			×
General			
Diagrams	Display information	Name V Label	
Objects		Name Constraint name	
Relationships	✓Display title		
	Default color		
	_		
	Default		OK Cancel

- **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