

RK ESG 23.2 - June 26, 2023

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Release Date: June 26, 2023

Release Overview

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What's new?

Form-to-Object Mapping Engine

System admins can now relate form questions to other objects' fields and a backend process will copy answers and place them into fields on custom objects. Our customers have asked for the ability to view data collected via forms on specific records related to an account or related objects to an account to easily view data and take action.

The list below maps out the capabilities in this release:

- System Admins can map a form question/answer to a field on either a standard or custom object
- System Admins can map a form question to multiple different fields, but cannot map the same object and field to different form questions
- Answers are only copied over when the associated Request = Closed and Workflow = Approved
 - If a form is reopened and approved again, we update the values on the existing mapped object record.

Technical details:

- Standard or custom objects used for this feature should have the following set of fields created by your System Administrator:
 - Container_Instance__c = containerInstanceId
 - All mapped objects should have a Container_Instance__c lookup field
 - Row_Number__c = rowNum
 - Mapped objects for tables should have a Row_Number__c field
 - Recipient_Account__c = params.get('recipientAccountId') - formula field
 - Name = params.get('requestName') != null ? params.get('requestName') : params.get('containerName');
- Card Sections: creates 1 record corresponding to current form instance Container__c
- Table / Group sections: create 1 record per row with row number and form instance Container__c
- Default record name for text-based record types is the Request Name associated to the Container Instance. Default record name for auto-number is controlled by the auto-number configuration.

The example screenshots below are of an object that gets populated with multiple collected table row records. If you wanted to populate the recipient of the request to your object, make sure you have a Recipient_Account__c formula field created that includes the formula provided above.

EDIT FORM TEMPLATE
Energy Consumption Demo Form 2023

Summary of your Energy Year To Date charges

ENERGY STATEMENT

Energy Statement

NEM Charges

[1 date Question_3]	[2 number Net_Peak_Usage]	[3 number Net_Off_Peak_Usage]	[3 number Net_Usage]	[3 number NEM_Charges]	[3 number NEM_Charges_after_Tax]
1/15/2023	40	66	106	14.60	16.06
1/31/2023	11	12.35	23.35	3.44	3.78

Form question
Question_3 (date)

QUESTION FORM ELEMENT ANSWER OPTIONS ADVANCED TRANSLATIONS

Dependencies

Parent Questions
Action

Data Loading

Sub Data Entity Data Entity

Data Mapping Object Energy_Consumption__c Data Mapping Field Bill_Period_End__c

System Field Id

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER
Energy Consumption

Details Fields & Relationships 12 Items, Sorted by Field Label

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Bill Period End	KLProdTestReq__Bill_Period_End__c	Date		
Container Instance	KLProdTestReq__Container_Instance__c	Lookup(Container Instance)		✓
Created By	CreatedById	Lookup(User)		
Energy Consumption Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
NEM Charges	KLProdTestReq__NEM_Charges__c	Formula (Currency)		
NEM Charges After Tax	KLProdTestReq__NEM_Charges_After_Tax__c	Formula (Currency)		
Net Off-Peak Usage	KLProdTestReq__Net_Off_Peak_Usage__c	Number(16, 2)		
Net Peak Usage	KLProdTestReq__Net_Peak_Usage__c	Number(16, 2)		
Net Usage	KLProdTestReq__Net_Usage__c	Formula (Number)		
Owner	OwnerId	Lookup(User,Group)		✓
Row Number	KLProdTestReq__Row_Number__c	Number(18, 0)		

Out of scope in this release:

- Admin cannot map multiple questions to the same field.
- Admin cannot map multiple table sections to the same field.
- Time field types are unsupported.

PT - Refactored PT Certificate Generation logic

The RK ESG package used to have one batch that generated all types of certificates for a product.

In production we can see that a product structure with many related products and many associated attributes can cause batch errors due to Salesforce limits: CPU timeout and Apex limits.

We have now broken down this master batch into one batch per certificate type. The certificate generation batches are now configurable by the parameters of Certificate (Id) and Testing Program (Id). There is also only one certificate type to Testing Program combination allowed per batch.

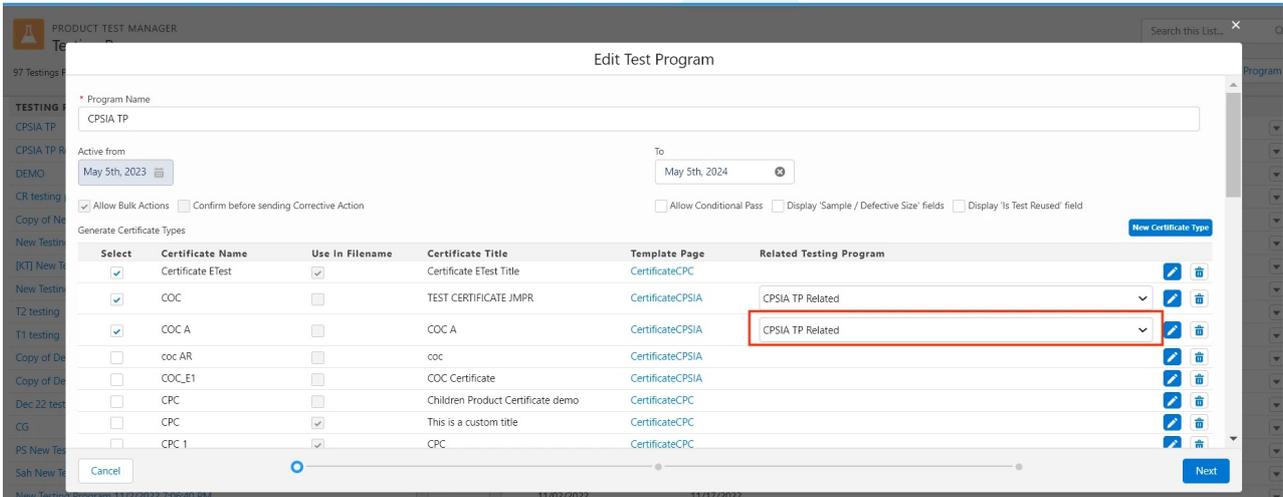
With this upgrade, customers will not notice any change to their experience and certificates will be generated as expected.

PT - Certificate Generation Logic from 2 Different Testing Programs

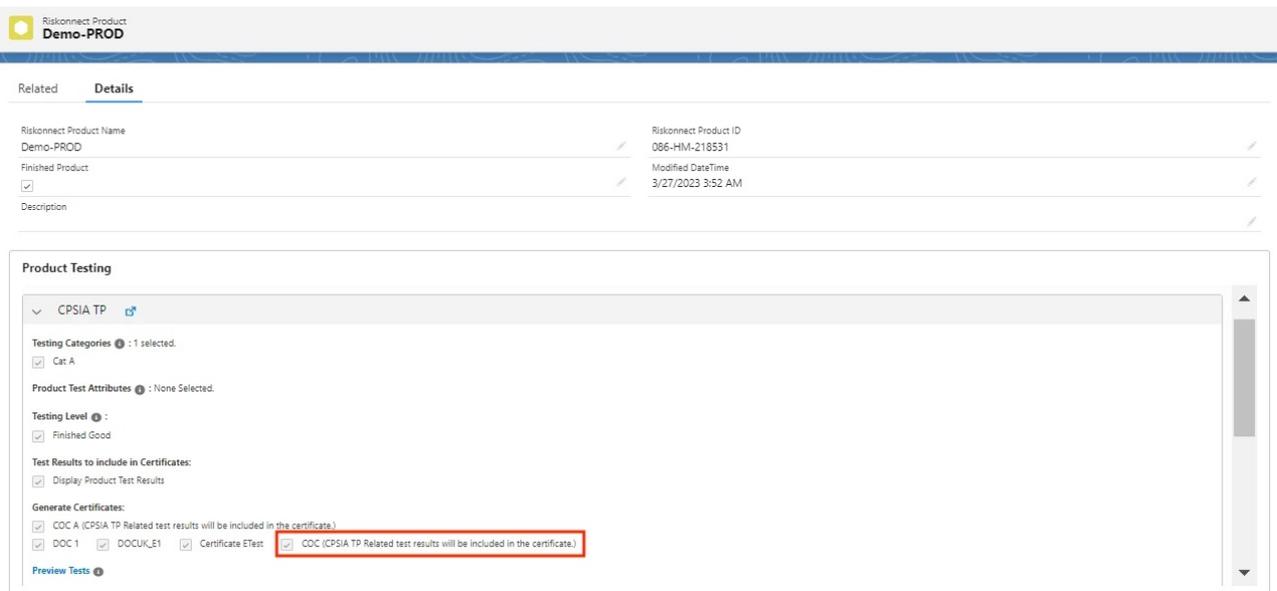
Customers have been reaching out for a way to generate a CPSIA certificate based on the testing results from

multiple testing programs, and at the same time generating certificates for individual testing programs as well.

In this release, you can configure the certificate generation logic to generate a CPSIA certificate from two testing programs from the logic settings within the Product Test Manager.



When viewing a Riskconnect Product's Testing Program configuration, you will see a note indicating that the certificate generation will pull test results from a related testing program.



Bug fixes

- Forms - Fixes and issue where the a date field in the calendar popover is showing the next day highlighted. Issue resolved.
- BRM - Fixes a issue where there could be duplicates of the standard lists in the List_c object. Issue resolved.