

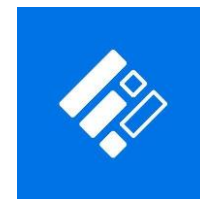


Custom Metadata Types Nonprofits & You

Sarah Pilzer



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SERCANTE

Me in 60 Seconds



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Platform Champion
Trailhead 2 x Ranger
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Certified Admin and Platform App Builder
Director of Operations

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participatory arts nonprofit
using NPSP since 2016 based in
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Session Goals

Learn

What are Custom Metadata Types and why might you use them?

Create

Walk through the process of setting up a new Custom Metadata Type in a nonprofit context.

Automate

See how to access and apply Custom Metadata Types in business automations.

Learn

Create

Automate

Custom Meta-what now?

Custom Metadata Types (CMDT)

met·a·da·ta

/ˈmedəˌdādə, ˈmedəˌdɑdə/

noun

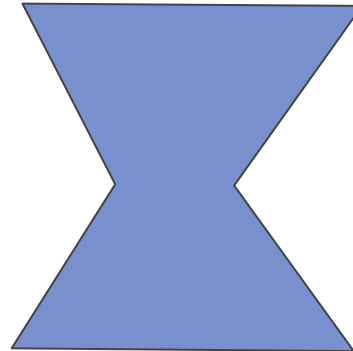
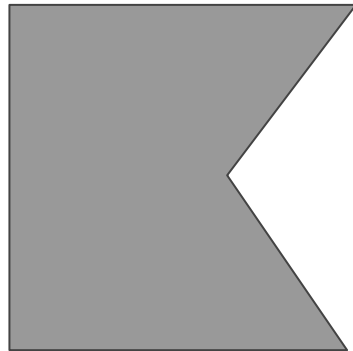
1. a set of data that describes and gives information about other data

Examples of metadata in Salesforce:

- Field names & labels (*First Name, Birthdate, Total Amount*)
- Data types (*text, date, currency*)
- Automations (*Process Builder, Flow, Apex Triggers*)
- Layouts (*Object page layouts, Lightning Record Pages, Components*)

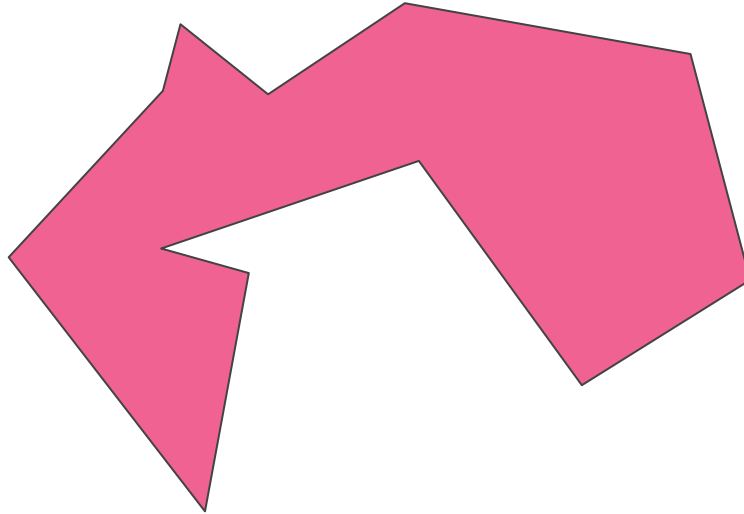
Custom Metadata Types (CMDT)

You can define the structure of your application metadata



Custom Metadata Types (CMDT)

You can define the structure of your application metadata



Customization Comparison

	Custom Label	Custom Setting	Custom Object	Custom Metadata
Store custom data values	✓	✓	✓	✓
Available in automation (formulas, validation rules, Flow)	✓	✓	✓	✓
Store configuration data		✓	✓	✓
Support complex field types			✓	✓
Support CMDT lookups				✓
Deployable data records				✓
Editable via Apex	✓	✓	✓	

CMDT Use Cases

- Mappings



CMDT Use Cases

- Mappings
- Business Rules



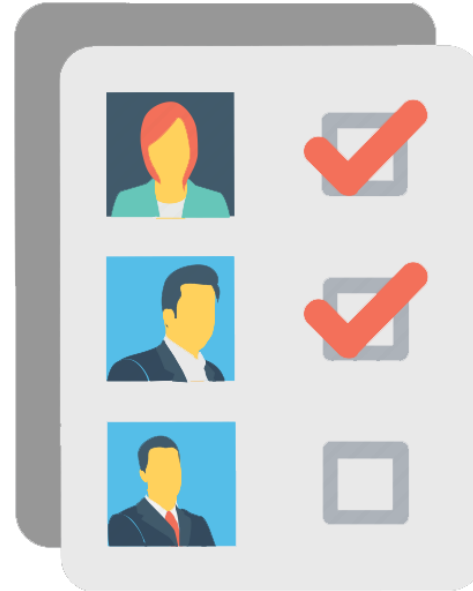
CMDT Use Cases

- Mappings
- Business Rules
- Master data



CMDT Use Cases

- Mappings
- Business Rules
- Master data
- Approval lists



CMDT Use Cases

- Mappings
- Business Rules
- Master data
- Approval lists
- Secrets



Learn

Create

Automate

Nonprofit Uses for CMDT

Use Case #1: Membership Dues

2 fields to determine \$ per level

- Member Level (picklist)
- Dues Amount (currency)



Use Case #2: Accounting Assignments

Assign funds based on combo of fields

- Opportunity Record Type
- Opportunity Type
- Designated Fund
- Percent



Learn

Create

Automate

Adding Business Logic

Use Case #1: Membership Dues

Process Builder

- Set a field value using CMDT in a formula



Use Case #2: Accounting Assignments

Flow

- Use multiple criteria to find CMDT
- Assign a fund based on CMDT record



Wrapping Up

Deploying CMDT Records

- Change Set components
 - Custom Metadata Type

Component Type: ▼

- Specific CMDT Records

Component Type: ▼





Q&A

Thank you for coming



Please return to the Reception area (the icon is at the top left of your screen)

to see your next networking, collaboration and learning options!

#nonprofitdreamin

