Highlighter

IMPLEMENTATION GUIDE

ToAFinish

HIGHLIGHTER FOR SALESFORCE.COM

Implementation Guide

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1

Introduction to this Implementation Guide

Introducing all the key components of the Highlighter App for Salesforce.com

This manual will help you through the implementation of the Highlighter app for your Salesforce.com Org. You can read this chapter if you desire to do so, but most users can probably start at the next chapter, where the installation and configuration instructions begin.

Thank you for considering our app in your organization.

ICON KEY
Details You Can Skip
Don't Miss This!
Sample Code
Danger!

To succeed in the installation process you will need to pay close attention to all of the information contained in this manual. We recommend reading through this first chapter before you begin, and then reading through each section as you work on it.

The Icon Key to the left shows the icons you will be seeing as you go through this manual. The more advanced readers can skip some of the details as indicated by the appropriate icon.

This manual is a work in progress, so please do take notes and let us know if you run into any issues with the text or if you believe there is a better way to accomplish the tasks we describe.

Introducing Salesforce.com

Salesforce.com's CRM solution is broken down into several broad categories: Sales Cloud, Service Cloud, Data Cloud (including Jigsaw), Collaboration Cloud (including Chatter) and Custom Cloud (including Force.com). Below, we'll highlight a few of them.

The Sales Cloud

The Sales Cloud includes a real-time sales collaborative tool called Chatter, provides sales representatives with a customer profile and account history, allows the user to manage marketing campaign spending and performance across a variety of channels from a single application, tracks opportunity-related data including milestones, decision makers, customer communications, and other information unique to the company's sales process. Automatic email reminders can be scheduled to keep teams up to date.

Other activities on the Salesforce cloud include using the Jigsaw business data to access business contacts, and designing and automating processes in Salesforce CRM.

The Service Cloud

The Service Cloud provides companies with a call center-like view that enables them to create and track cases coming in, and automatically route and escalate what's important. The Salesforce CRM-powered customer portal provides customers the ability to track their own cases, includes a social networking plug-in that enables the user to join the conversation about their company on social networking websites, provides analytical tools and other services including email, chat, Google search, and access to customers' entitlement and contracts.

The Force.com Platform

Salesforce.com's platform as a service (PaaS) product is known as Force.com. The Force.com platform allows external developers to create add-on applications that integrate into the main salesforce.com application and are hosted on Salesforce.com's infrastructure.

These applications are built using Apex (a proprietary Java-like programming language for Force.com) and Visualforce (an XML-like syntax for building user interfaces in HTML or Flex).

Web Services

In addition to the web interface, salesforce.com offers a **SOAP/REST Web service API** that enables integration with other systems. This is the technology we will be using to power the integration with ETAdirect.

You can continue reading more on Salesforce.com at WikiPedia.com.

Introducing To A Finish

To A Finish™ is a concept company that has grown out of a desire to improve the Salesforce CRM consulting industry. Too often we have found the priorities of consulting companies skewed towards speed and profitability, rather than excellence and long-term success. This is not a blanket statement about all consulting companies, rather a general statement of the industry at large.

We believe there is a different way of consulting that will bring ultimate success to any CRM venture. The biggest difference is time. We give special attention to steps that are often rushed or even overlooked entirely in a typical project. Things like in-depth analysis, getting to really know a business, documentation and end-user involvement in the process help us set up a project for success. Ultimately, we must spend the time to do the work until it is absolutely complete; To A Finish™.

We are not guaranteeing our clients will never see a bug or have to rethink initial strategies. Reworking is actually part of the process of achieving success. What we are saying is that our strategies and focus will minimize unforeseen problems and achieve for us an ultimately successful project completion. We put our name on our work and stake our reputation on quality service.

Test us. Allow us to show you the difference of doing work To A Finish™.

You can find more about To A Finish at www.toafinish.com

When you finish a thing you ought to be able to say to yourself: "There, I am willing to stand for that piece of work. It is not pretty well done; it is done as well as I can do it; done to a complete finish. I will stand for that. I am willing to be judged by it."

- O.S. Marden

Introducing the Highlighter App

Salesforce.com allows you to customize standard layouts to a great degree. However, one thing you cannot do is highlight or dynamically change elements. Now, you can highlight virtually any field or button on a page.

Encourage the right process and highlight important elements on most Salesforce.com records. Until now, contextual highlighting has only been available in reporting. Now you can highlight virtually any field on a page. You can also highlight, dynamically rename, hide or disable buttons on your page layouts.

Use your imagination and mold the Salesforce.com standard layout to:

- Bring attention to fields that are important
- Color elements showing the process next steps
- Hide or disable buttons that do not apply currently

Free vs. Paid App Comparison

The Paid version of Highlighter includes many advantages. See a chart comparing the versions below:

Feature	Free	Paid
Technical Support		√
Number of Actions	**5**	**Unlimited**
Standard Objects *	√	√
Standard Fields and Buttons	√	√
Custom Objects		√
Custom Fields and Buttons		√

* Including Accounts, Assets, Campaigns, Cases, Contacts, Events, Leads, Opportunities, Orders, Products and Tasks. (Some standard objects, like Quotes, are not compatible.)

It is time. *Make Salesforce.com yours!*

Before You Begin, Requirements

Before you begin working with our app, you must have several components already in place and configured. We will not cover these components in detail, but will at least point you to where you can get the information you need.

Salesforce.com

A production system Salesforce.com Org will be needed in order to set up the integration. A sandbox will be very helpful in this process as well. Any edition of Salesforce.com should work.

- Sales Cloud
- Service Cloud
- Custom Cloud (Force.com)

Warning: Test First!

Before you deploy this solution to your production Org, it is strongly recommended that you test it in a sandbox first.

Please always test any admin app of this type first.

Test. Test. Test.

Highlighter is really on the cutting edge of what Salesforce.com can do in its current user interface, so we are expecting to discover some problems along the way. While we are no longer in official BETA, we are still an app in its infancy. Help us out!

If you like the app, please leave us a positive review on the AppExchange. But if you run into issues, *please* don't leave them there for the world to see. Rather, contact us at support@toafinish.com and we'll work together to make this app To A Finish™.

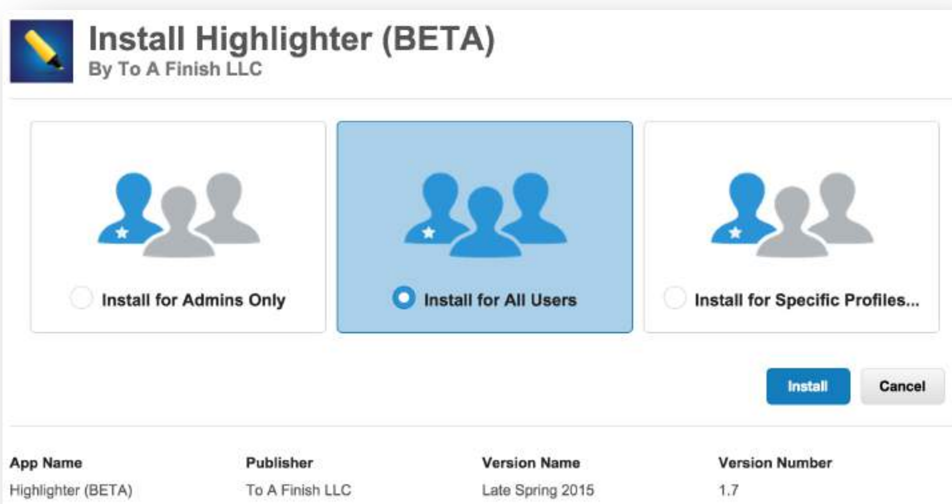
* Note: This app will NOT work with the new **Lightning Experience** released in Winter '16. We are confident that it will work in the future, but we are still waiting for availability of several key elements before it will work. In the mean time, you can enjoy the Lightning-enabled configuration screens.

Chapter
2

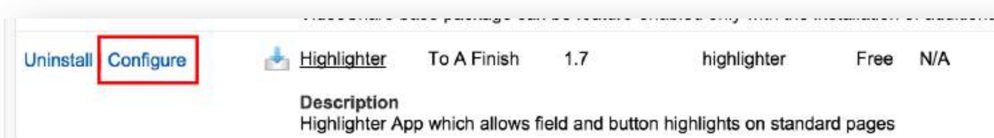
Configuration

The steps necessary to set up the app for full use

The initial steps in the configuration are completed by first installing the package from the AppExchange.com app store. Make sure to **Install for All Users**. Even though only an Admin will configure it, you need to install for All Users so that they can access the pages correctly.



Next, click: Setup → App Setup → Installed Packages and click on the **Configure** link next to the Highlighter package.



Setting up Your Org's "Remote Site"

The first thing you will see when you go to configure your Highlighter app, is a warning telling you that you need to set up a "remote site" before you can use the app. "Remote site" is the term used for the URL to access your Org's metadata.

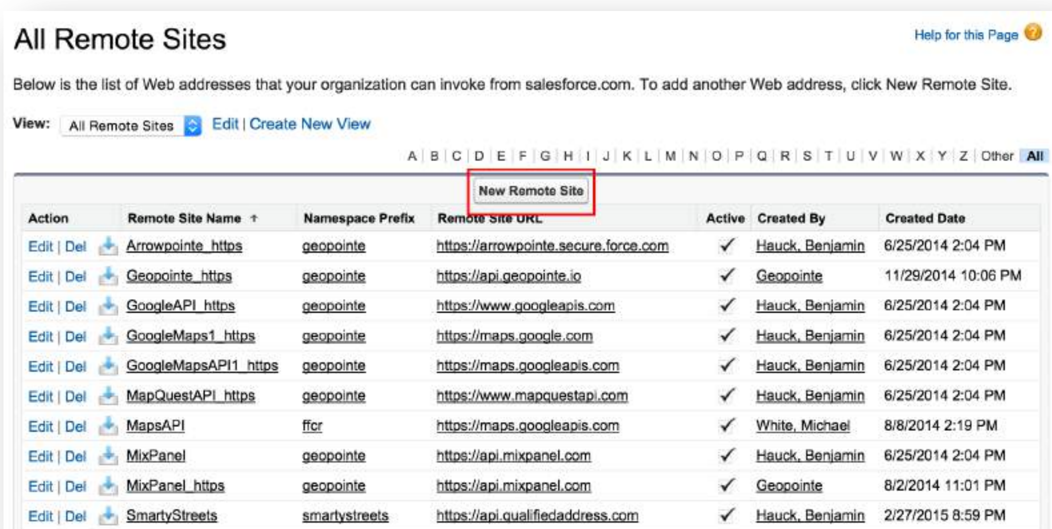
> ** Please note that To A Finish (the makers of this amazing app) cannot access your Org as this term might imply to some. This step is necessary so that you can access your own metadata (data about your data, in this case fields and buttons) through our app.*

Read more about the Remote Site settings from the Salesforce.com Developer documentation [here](#).

If you see this error, please follow these steps:

1) Copy the **endpoint** indicated in the error, starting with the "https://" and all the way through the end.

2) Now, go to: Setup → Security Controls → Remote Site Setup.



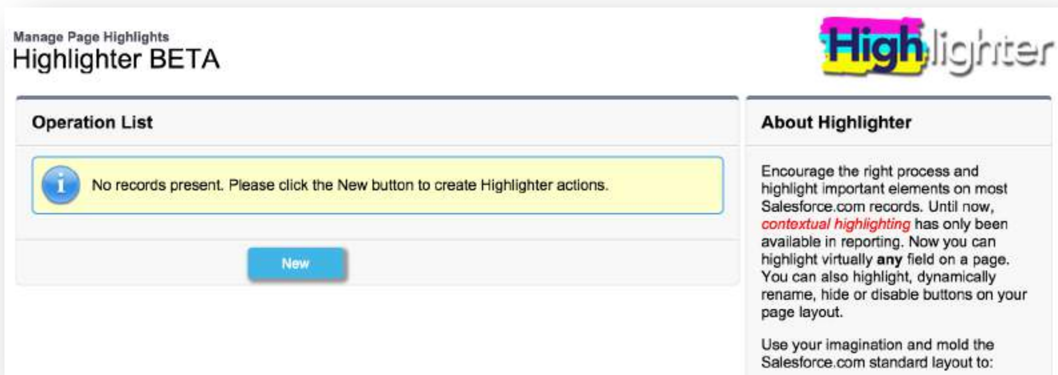
3) Click on the **New Remote Site** button.

4) In the Remote Site Edit dialog, enter any name for the **Remote Site Name**, and then paste the URL you copied in step #1 into the **Remote Site URL** field.

5) Make sure the **Active** checkbox is enabled, and press the **Save** button.

6) Now go back to configure Highlighter. Go to: Setup → App Setup → Installed Packages and click on the **Configure** link next to the Highlighter app.

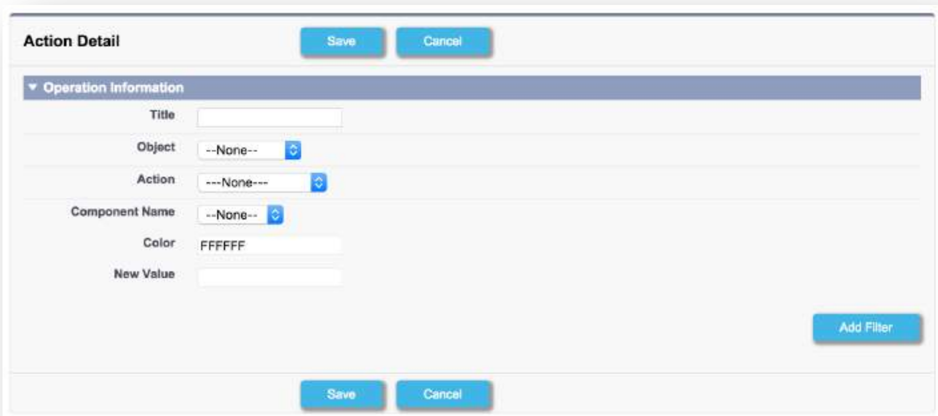
You should see the Highlighter setup page, alerting you that you have not yet set up any Highlighter Actions.



Adding Your First Action

To add a new action, follow these steps. If you get lost along the way, please contact us at support@toafinish.com. While we cannot provide support if you have not purchased the app (which is dirt-cheap, by the way!) we will attempt to answer any quick questions that come in via email.

1) Click the **New** button.



2) Select the object you wish to highlight from the **Object** dropdown. Please note that only standard objects are available in the FREE version. **Note: a few standard objects, like the Quote object, are not compatible with Highlighter.*

3) Select one of 5 options from the **Action** dropdown. These options are described below:

Action	Description
Highlight Button	This allows you to color a button on the page for the object selected.
Highlight Field	This allows you to color the background of a field on the page for the object selected.
Disable Button	This allows you disable a button. Users will still see it, but won't be able to click on it. *
Hide Button	This will actually remove the button from the layout.
Rename Button	This will rename the wording on a button.

4) Select a component from the **Component Name** dropdown. If you selected "Highlight Field" as the Action, then a list of all fields in the selected object will be available. If you selected one of the other options, then you will see a list of buttons for the object. (Custom fields and buttons are only available in the Paid version.)

5) If you selected an Action that requires a **Color**, you can click into the field to choose which color you want; or you can type in the color *code*, if you are the digital artist type.

6) If you selected the "Rename Button" Action, then you can enter the new button name in the **New Value** field.

7) Type in a Name for this action in the **Title** field at the top. Say something descriptive that you will remember when you see this action on a list.

At this point you are done with your action IF you want it to be permanent. To always happen.

8) If you want this action to only happen *sometimes*, press the **Add Filter** button. This will open up a new area for a filter.

9) Select a field from the **Field** dropdown. These will be the fields from the Object you selected in step 2. Note that the field you select here does not have to be the same field you may have selected in the Component Name above. This field is the one that will dynamically determine IF this action should take place.

10) Select an **Operator** from the dropdown list.

11) Type in a value into the **Value** field. At this time only hard-coded values can be entered here for all types of fields except for picklists. The format of the value will be determined by the next field.

12) The next field you must select is the **Value Type**. It is critical that you match up the Field, Value and Value Type so that they are the same type of field. For example, if the Field is a number field, then you want to select that as the Value Type and you want to make sure that whatever you type in the Value field will be a good value for this field. Use the chart below as a guide.

Value Type	Usage Description
Text	Anything goes in here. But make sure it is realistic.
Number	Only a number should be entered here. For example: 100 or 13.5 or 0.
Boolean	Only True or False should be entered here. True means that the checkbox is checked, and False means that it is unchecked.
Date	This is used for Date or DateTime fields. The format here is very important. You must use yyyy-mm-dd for a Date field and yyyy-mm-dd HH:mm:ss for a DateTime field. (No dynamic dates like LAST WEEK are allowed yet.)

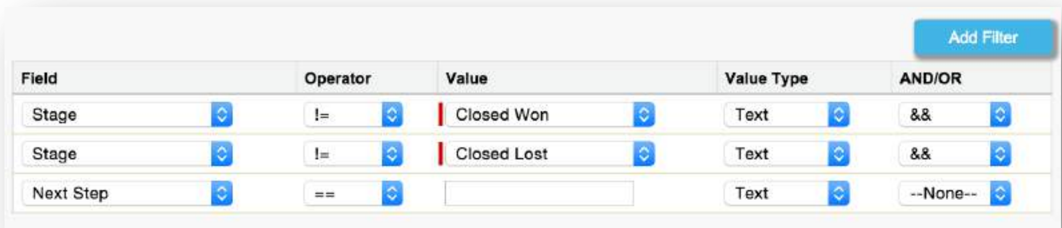
Note: We recommend that you use as few filters as possible in order to cut down on the time it takes for the page to load. If you have multiple filters for a particular action, the best practice is to create a Boolean formula field that gives you either a True or False result, and then use that here. However, you are also able to create multiple filters on one action. To do so, continue reading.

13) Click the **Add Filter** button again to add an additional filter, if necessary. Once you do this, you should go back to the first filter you added and select an option from the "And/Or" dropdown.

&&	Means that this filter AND the filter below need to be true in order for the action to run.
||	Means that this filter OR the filter below can be true in order for the action to run.

Note: at this time we do not support nested filters or mixing **&&** and **||** filters. For that, please create a formula field on your object to be used as the sole filter.

14) Once you are done adding your filters, press the **Save** button and you will be taken back to the list of Actions.



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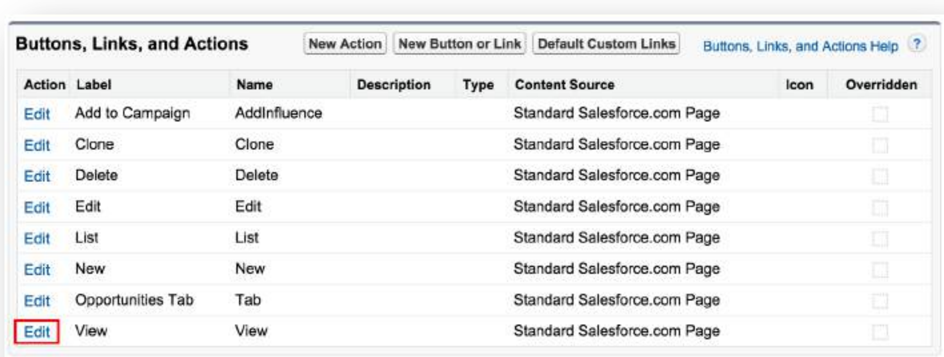
Turning On Highlighter for your Users

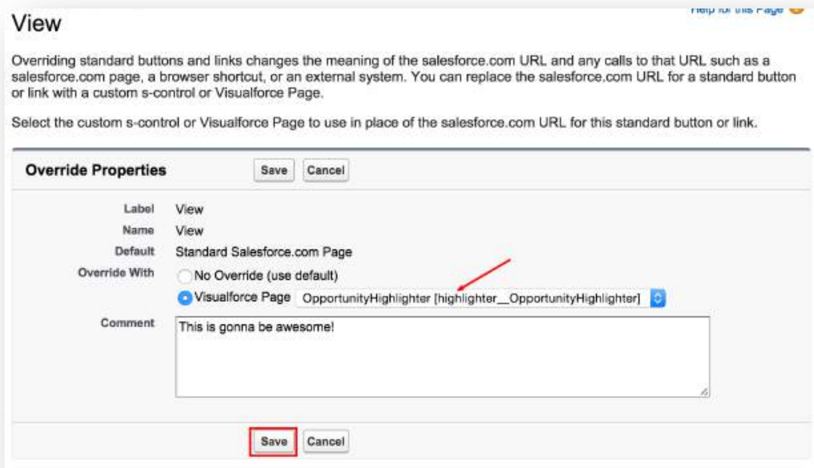
Once you have created actions for one or more objects (you are limited to 3 actions in the FREE version), you must follow these steps to turn it on for all of your users.

1) Go to the "Buttons, Links and Actions" area for the Objet you want to activate Highlights for. For example, if you wanted to activate Opportunities, then you would go to: Setup → Customize → Opportunities → Buttons, Links and Actions.

2) Click **Edit** on the View item.



3) This will take you to a page where you can select to override the standard layout with a Visualforce Page. Select the appropriate Highlighter VF page from the drop down, and press the **Save** button.



* Note that your existing layouts will still show up and you will continue to edit them the same way you do now. The Visualforce page you are selecting is a "wrapper" that sits on top of the standard layouts you manage.

4) If you did not install the App for "All Users", some of your regular users will not be able to see this page and will get an insufficient rights error. If that happens, please go to the **Profile** for that user and add this Visualforce page to the Visualforce pages they are allowed to see.

5) And ... *you are done!* Go to a record for the object that you put an action for and see the results!

Upgrading Your App

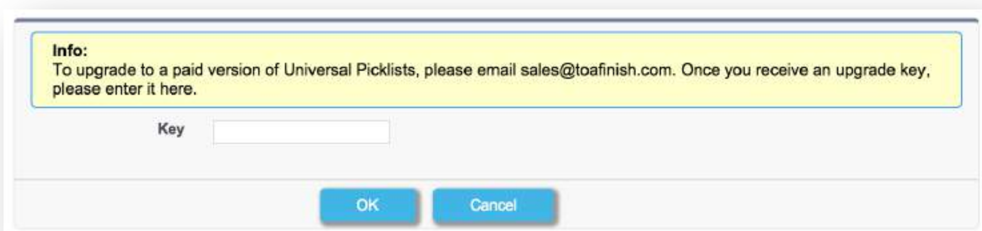
The free version of the app will allow you to maintain up to three Highlighter Actions in a single Org. The paid version gives you much more. See page 7 of this Implementation Guide for a list of the advantages of the paid version.

To upgrade to a paid version, you will need to email sales@toafinish.com and give the following information:

- **Your Org Id**. (Go to Setup → Company Profile → Company Information)
- **Billing Contact Name** and **Billing Address**. This is the information where an invoice for the paid version will be sent.

The cost of the upgrade is a **$99/forever**, one-time fee (not per year). The **Upgrade Key** should be emailed back within 24 hours, usually much less time than that.

Once you receive the upgrade key, click on the **Upgrade** button and paste the key into the box:



Once you have entered a valid key, press the OK button to unlock the paid functionality in the app.

Information on technical support will also be emailed to you at the same time as the key. Use this information for any questions you might have.

Custom Objects

As soon as you upgrade the app, you can add highlights for custom objects. However, you need to do an extra step for each custom object that you want to highlight.

1) Go to the "Visualforce Pages" area: Setup → Build→ Develop → Visualforce Pages and click on the **New** button.

2) Enter a "Label" and "Name" for the new page and then paste in the following code, changing everywhere it says "XXX" to the actual API name of your custom object, and where it says "YYY" with the label:

```
<apex:page standardController="XXX__c" title="XXX: {!XXX__c.Name}" id="pg">
    <apex:Detail subject="{!$CurrentPage.parameters.Id}" relatedList="true"
     inLineEdit="true" relatedListHover="true" showChatter="true"  title="true" />
    <highlighter:HighlighterScript ></highlighter:HighlighterScript>
</apex:page>
```

3) Press the **Save** button and if you replaced all of the areas correctly, you should not receive any errors.

4) Next, you want to set the view page for this object by going to Setup → Build→ Create → Objects and clicking on the object you want to set up.

5) Scroll down to the "Buttons, Links, and Actions" section and click the **Edit** button. Select the Visualforce Page that you created in step #2 and **Save**.

6) Test by going to a record in your custom object, and you should see any highlights you have set up.