

Current Version: BYOB v1.16 Highlight Field Bold

Version Number: 1.16

Release Date: 2024-11-29

Installation URL:  
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04ta5000000wRxVAAU>

Release History

Version Name	Version Number	Release Date
BYOB v1.15 Field Lab	1.15	2024-11-27
BYOB v1.14 Related L	1.14	2024-08-22
BYOB v1.12 Contextua	1.12	2024-08-21
Byob July 24 Patch 1	1.4.1	2024-07-23
BYOB Aug 24	1.11	2024-07-23
Byob July 24	1.4	2024-07-10

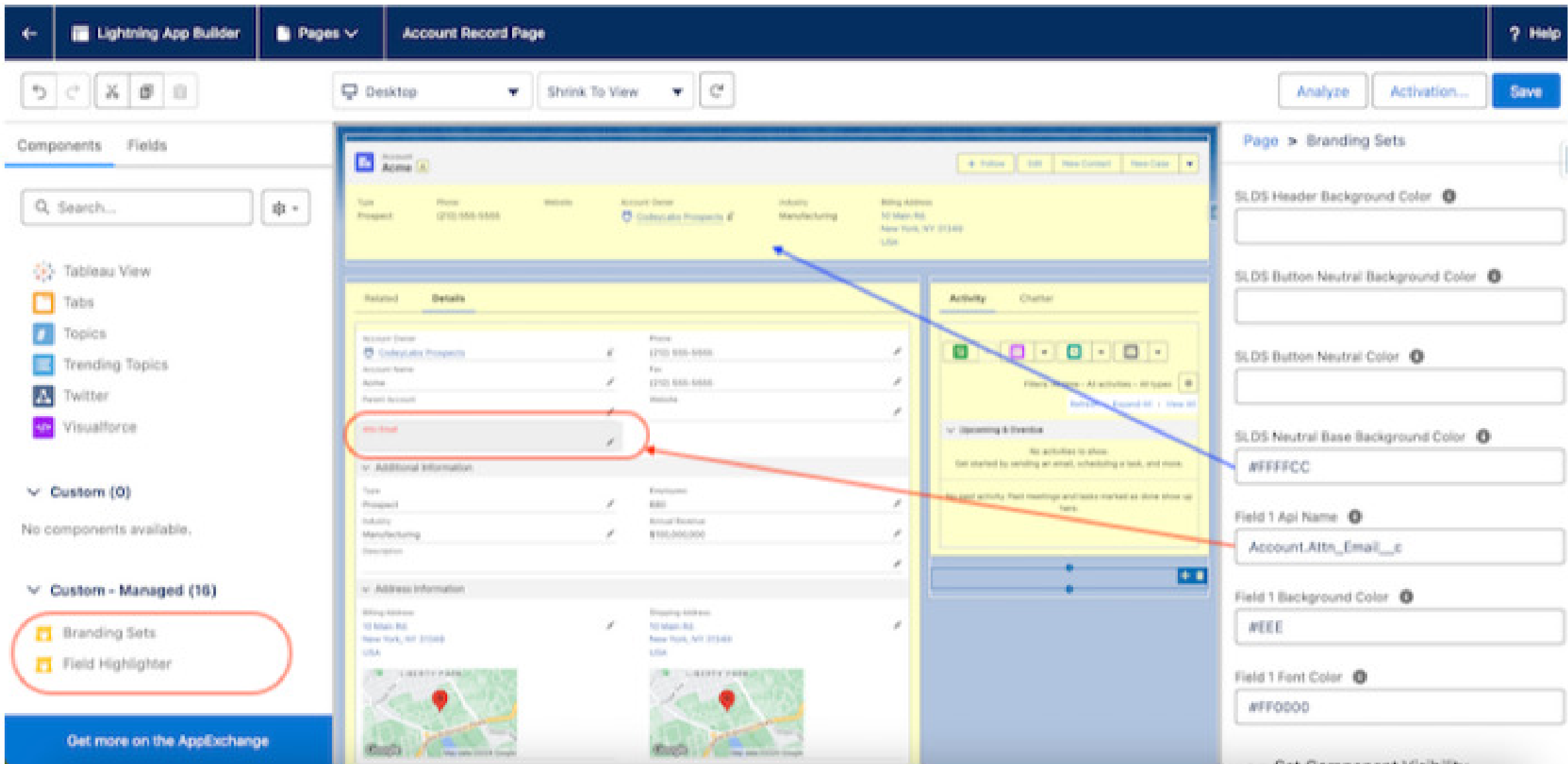
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# 1. Introduction

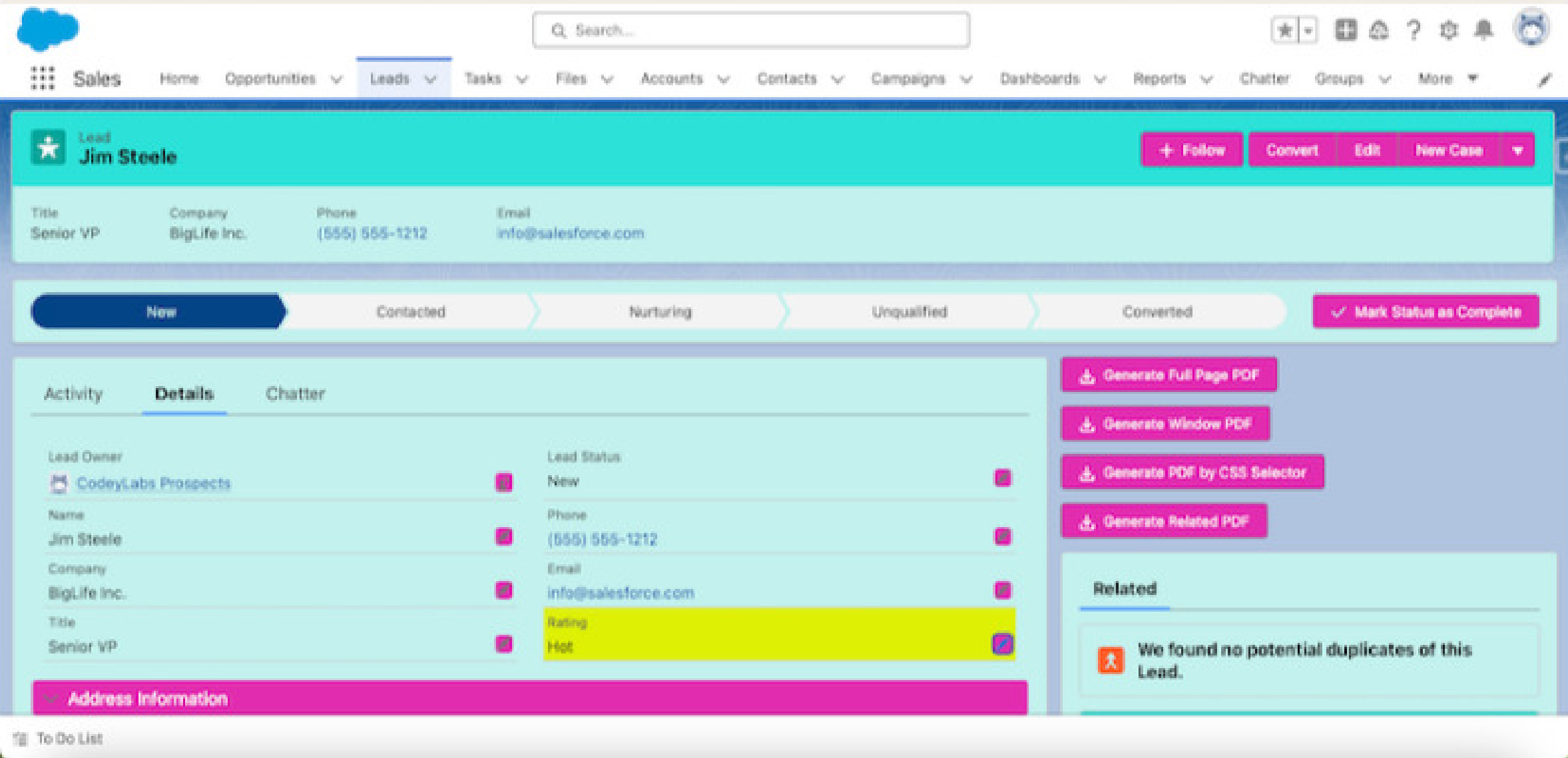
## 1.1 Overview

**Build Your Own Branding** is a comprehensive package designed for Salesforce users to customize the look and feel of their record pages. This package includes two powerful components: **Branding Sets** and **Field Highlighter**. Together, these tools allow organizations to align Salesforce with their brand identity, enhance user experience, and improve the visibility of critical information.



## 1.2 Key Features

- **Custom Color Schemes:** Tailor the **appearance of record pages** with **Branding Sets**.
- **Field Highlighting:** Draw **attention** to important fields with custom highlights.
- **Role-Based Customization:** Apply different themes and highlights based **on user roles**.
- **Event-Themed Branding:** **Temporarily** change themes for **special events or campaigns**.



## 1.3 Benefits

- **Enhanced Brand Identity**
  - Keep Salesforce aligned with your corporate branding.
- **Improved Usability**
  - Help users quickly identify key information on record pages.
- **Increased Engagement**
  - Use custom themes to promote events or highlight critical data.

# 2. Getting Started

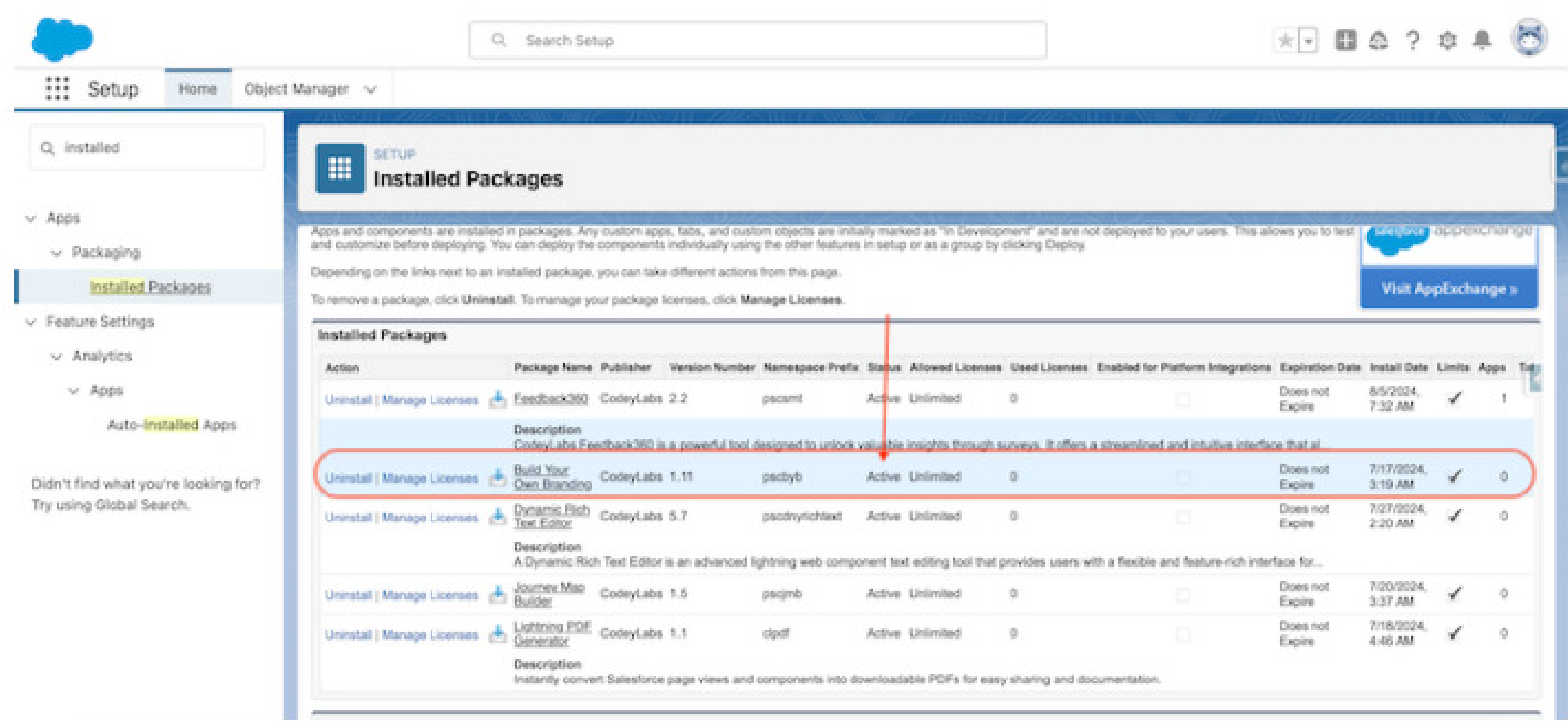
## 2.1 System Requirements

- Latest package available for **Salesforce Enterprise, Unlimited and Developer Editions**.
- **Salesforce Lightning** Experience.
- Supports **Custom or standard** Salesforce objects record pages.

## 2.2 Installation Instructions

1. Find the latest version installation URL mentioned in the starting of this document
2. Login to your salesforce org, and select install for all users, and accept.
3. Click **Install** and follow the on-screen instructions to install the package in your Salesforce org.

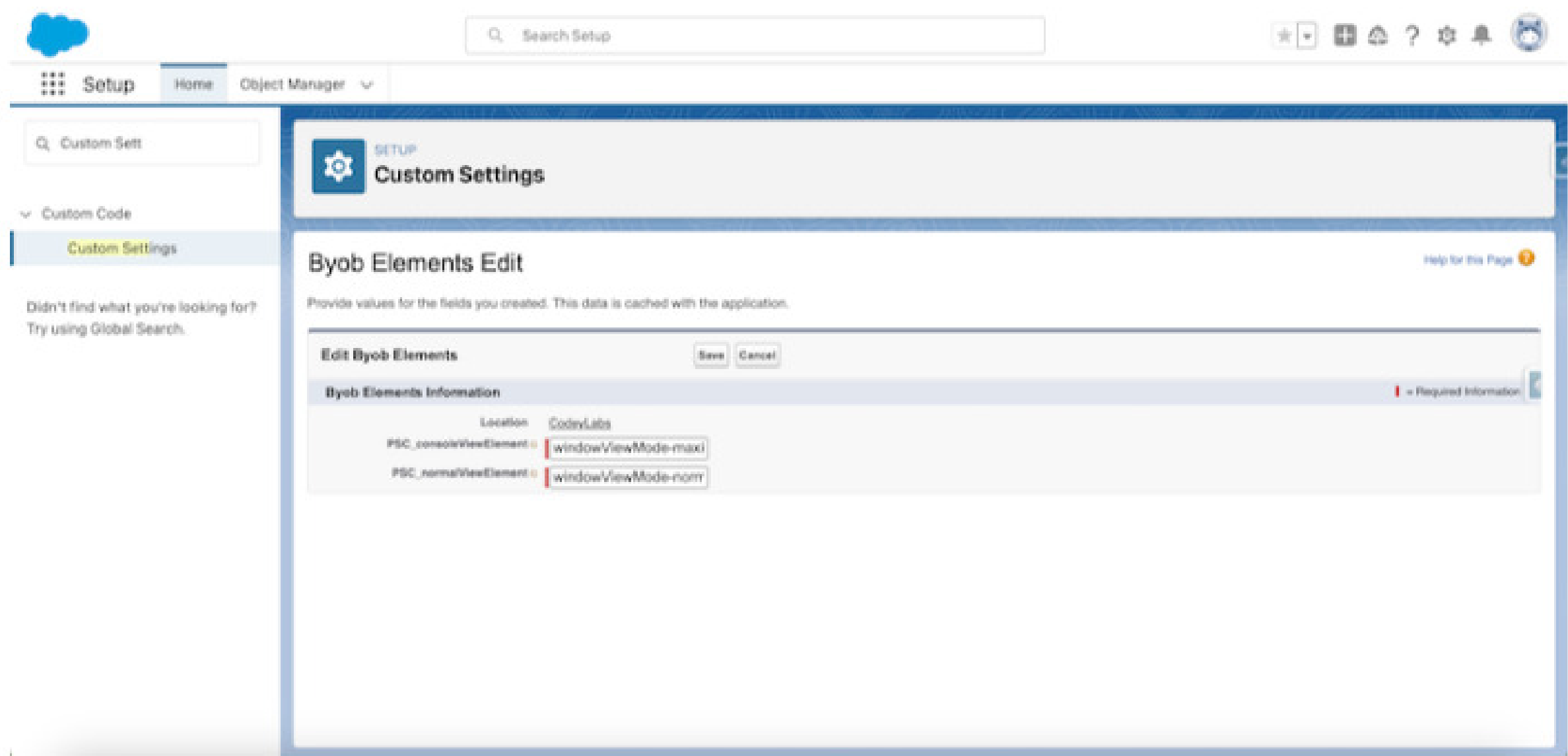
4. After installation complete, Ensure your **license is active** for the components.



## 2.3 Initial Setup

Note that, this is a **mandatory step**, if not completed, branding changes will not display, even if you have applied the component and related colors on a object record page.

- **Navigate to Setup > Custom Settings > Byob Elements.**
- Click **Manage > Default Organization Level Value > New.**
- Add the following values:
  - **windowViewMode-normal** in the PSC\_normalViewElement field.
  - **windowViewMode-maximized** in the PSC\_consoleViewElement field.
- **Save** your settings.



## 3. Branding Sets

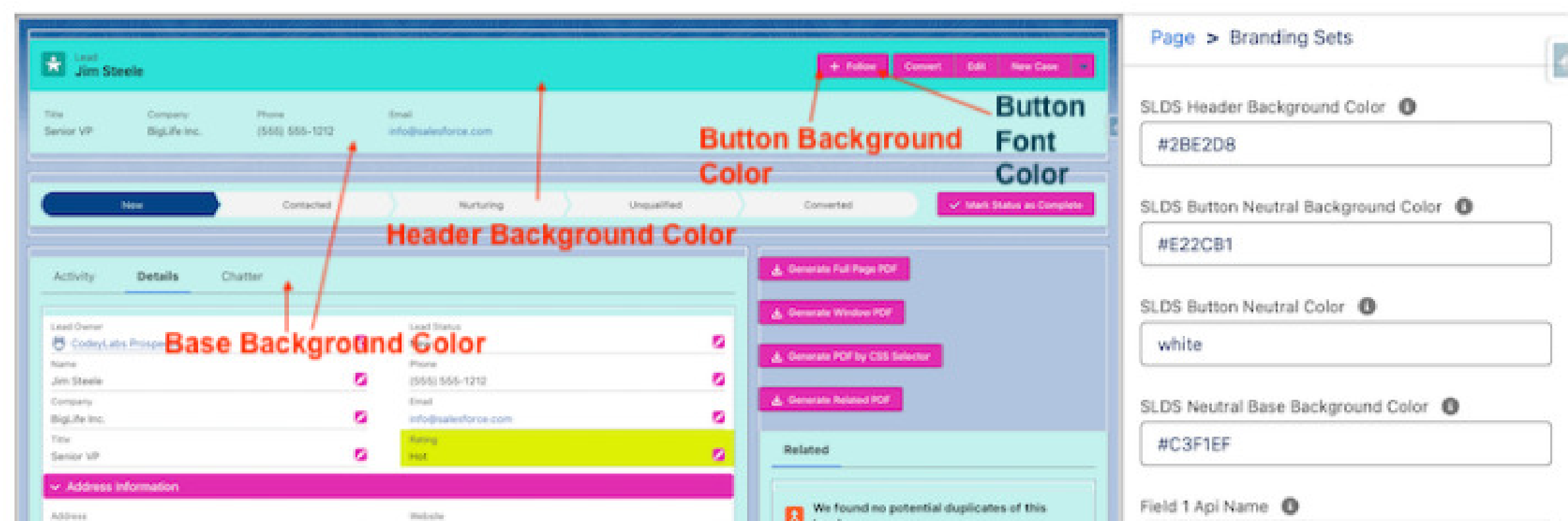
### 3.1 Accessing the Branding Sets Component

- Go to any **Salesforce object record page**.
- In the **App Builder**, find the **Branding Sets component** in the **sidebar** under **custom managed components**.
- **Drag and drop** the component onto the record page **as the last component on a column**.

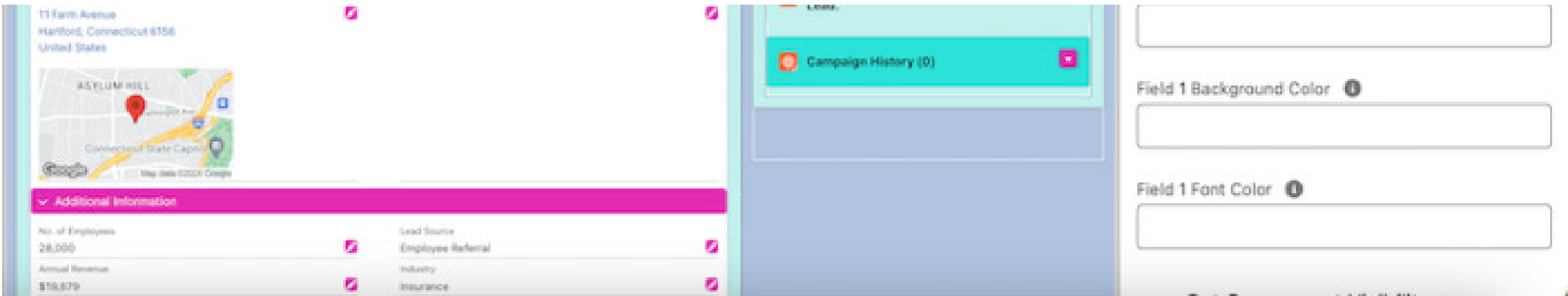
### 3.2 Customizing Colors

The color values supports formats HEX, RGB, RGBA.

- **Background Colors:** Set the background color for different elements on the record page
  - **SLDS Header Background Color:** Set the header background color.
  - **SLDS Neutral Base Background Color:** Set the widgets background color.
- **Button Colors:** Customize the colors of buttons on the record page. **Note well**, that buttons colors appears, only when both of below values are set.
  - **SLDS Button Neutral Color:** Font color of button.
  - **SLDS Button Neutral Background Color:** Background color of button.





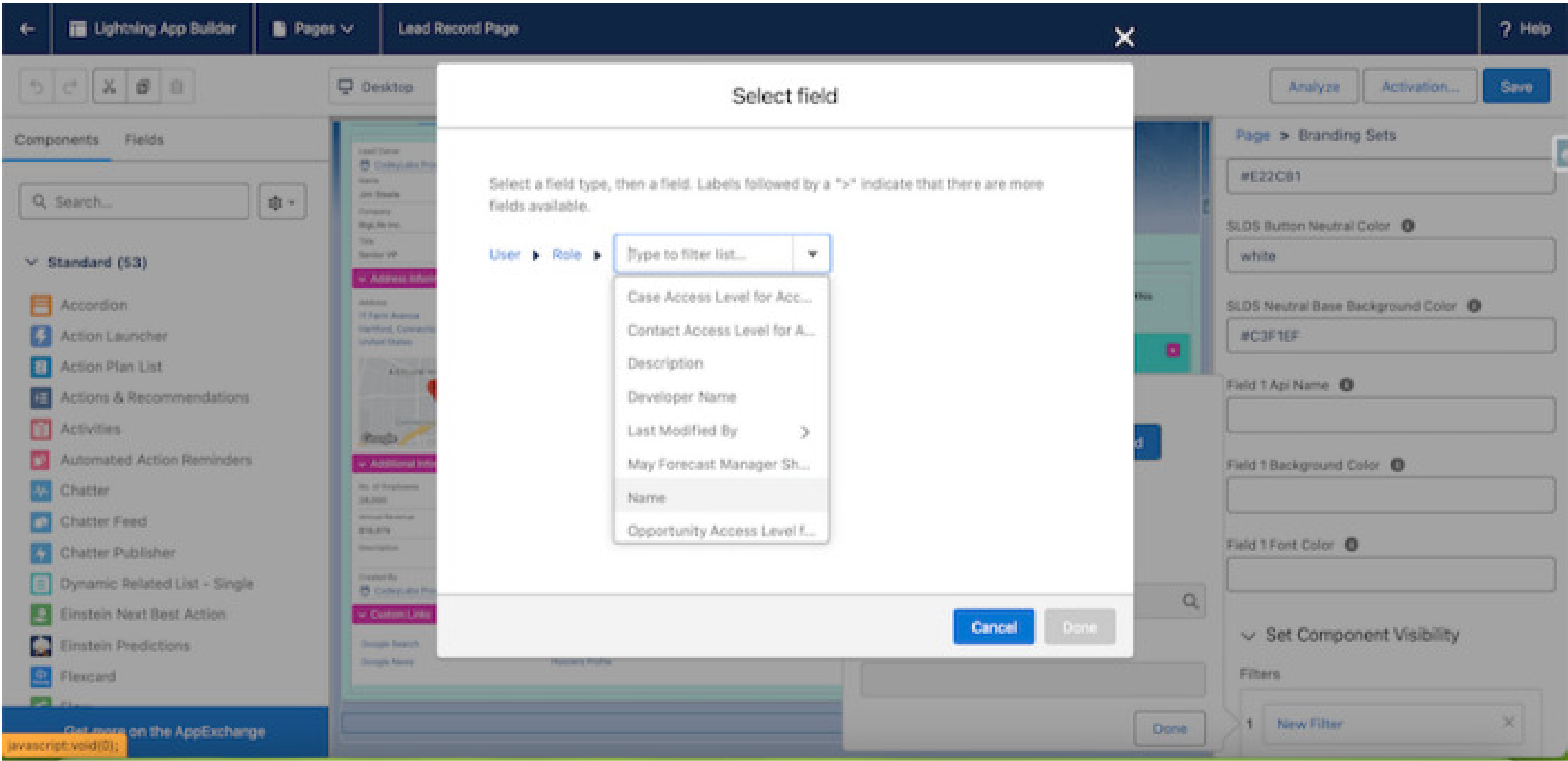


### 3.3 Applying Branding Sets to Record Pages

- After placing the component, **configure the color settings** to match your branding needs.
- **Preview** your changes in the App Builder.
- **Save** your settings to apply them to the record page.

### 3.4 Role-Based Customization

- **Use role-based customization** to apply specific color schemes depending on the user’s role.
- This can be configured through Salesforce’s component visibility settings on App Builder.
- Under Set Component Visibility > Add Filter.
- Select **Advanced > User > Role**. And provide your condition of visibility.
- Only matching filter condition users will be able to see the branding.



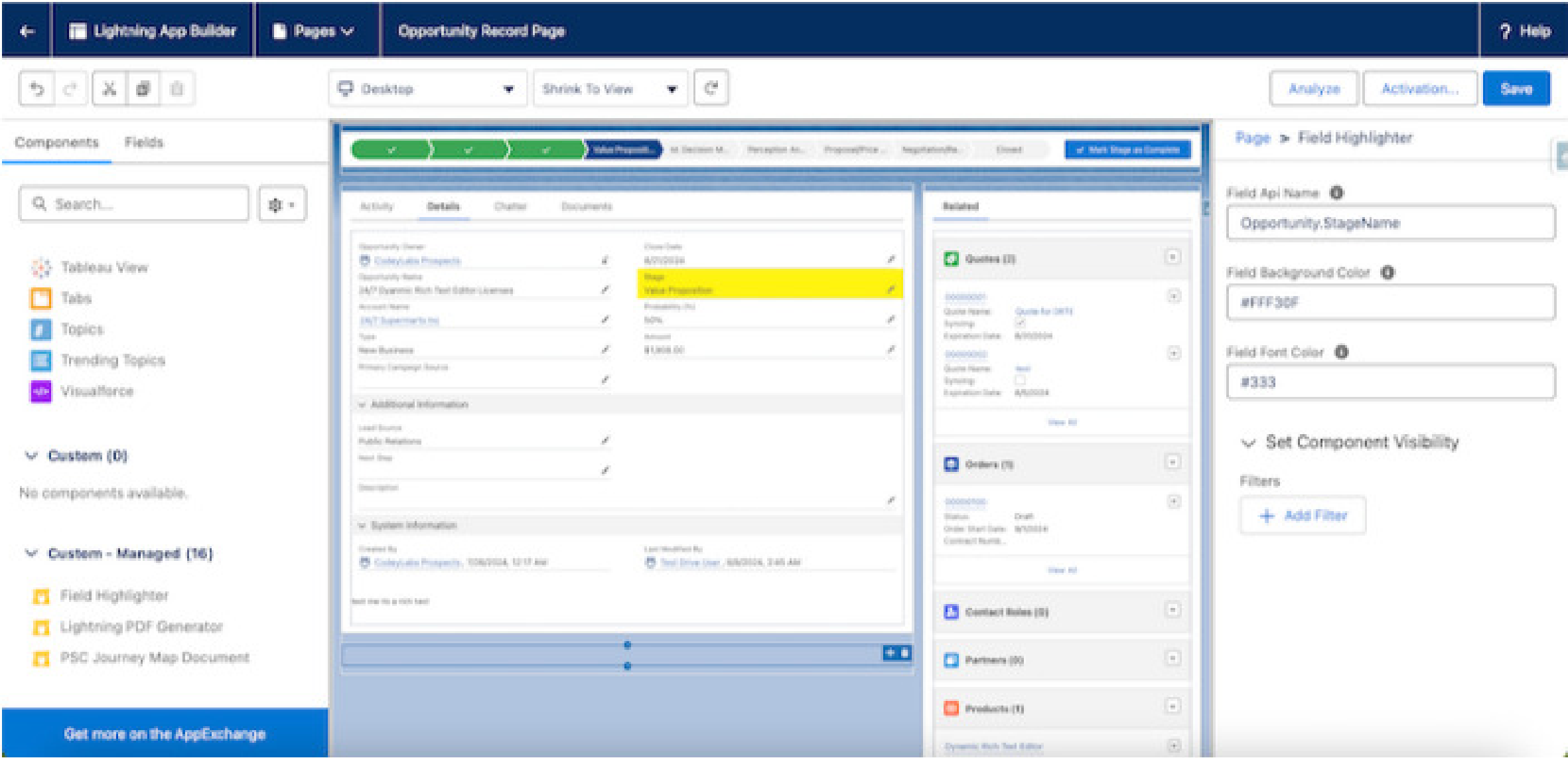
### 3.5 Use Cases for Branding Sets

- **Corporate Branding:** Align **Salesforce record pages** with your **company’s color scheme** for consistent branding.
- **Departmental Customization:** **Differentiate** record pages for **various departments** like Sales and Service.
- **Event-Specific Branding:** **Temporarily** change colors for specific **events** or marketing campaigns.
- **Seasonal Themes:** Update pages with **seasonal colors** to reflect marketing strategies or celebrations.
- **Brand-Specific Cases:** Distinguish cases from **multiple brand websites** with **unique color schemes**.

## 4. Field Highlighter

### 4.1 Accessing the Field Highlighter Component

- Go to any **Salesforce object record page**.
- In the **App Builder**, find the **Field Highlighter component** in the sidebar under **custom managed components**.
- **Drag and drop** the component onto the record page as the last component on any column so that it doesn't overlap any other component.



### 4.2 Highlighting Important Fields

- **Field Selection:** Choose the field you want to highlight based on importance or relevance. **Make a note of the Object Api Name and the Field Api Name from the object manager in Setup.** *If the object and/or field belongs to the different managed package, please ensure to prefix managed package name as defined in the object manager.*
- **Highlight Styles:** Customize the highlight color and style to make the field stand out.

4.3 Conditional Field Highlighting

- **Set up conditions for highlighting fields** based on specific criteria using the Set Component Visibility > Apply Filter.
- For example, **highlight the Lead Score field in red** if the score is below a certain threshold.

4.4 Use Cases for Field Highlighter

- **Critical Data Alerts:** Highlight fields like Lead Score or Opportunity Value to draw immediate attention.
- **Role-Specific Field Emphasis:** Different roles can have different fields highlighted based on what’s important for them.
- **Conditional Highlighting:** Automatically highlight fields when certain conditions are met, such as overdue tasks.

5. Advanced Configuration

5.1 Dynamic Event-Themed Colors

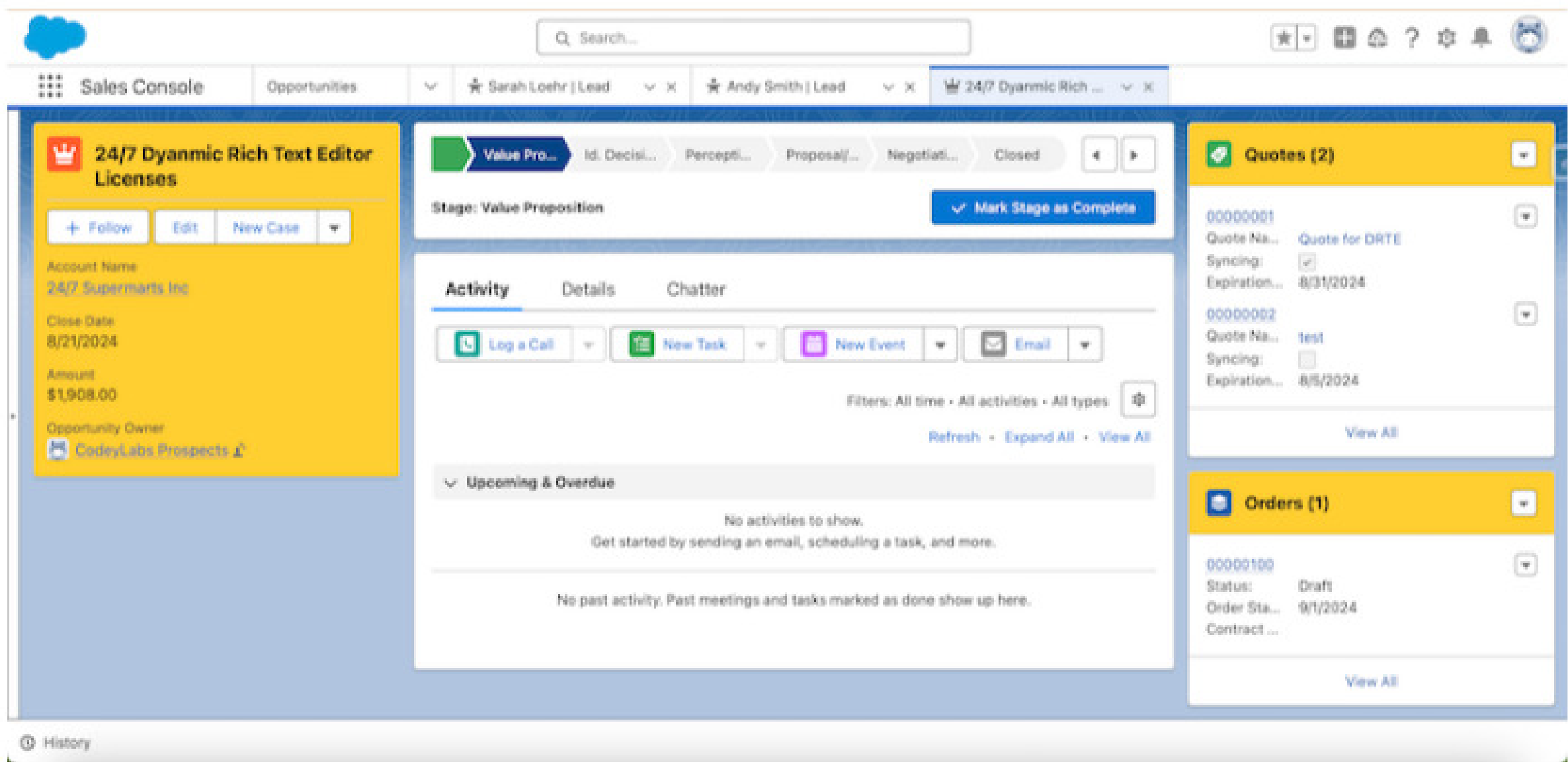
- **Branding Sets:** Configure to dynamically change colors during events or campaigns.
- **Field Highlighter:** Adjust highlight colors based on current promotions or special conditions.

5.2 Accessibility Enhancements

- **High Contrast Options:** Ensure colors and highlights are accessible to all users.
- **Screen Reader Compatibility:** Test settings with screen readers to ensure usability for visually impaired users.

5.3 Console App Compatibility

- **Branding Sets:** Works seamlessly within the Salesforce console app.
- **Field Highlighter:** All highlights and customizations are fully supported in console navigation.



6. New Releases

Version 1.12

- **6.1 Contextual Help**
  - Accessing the Contextual Help Component
  - Configuring the component
  - Use case: A hint to the agent before pushing Merge Cases button.

Version 1.14

- **6.2 Support for Related List Button within Contextual Help Component**

Version 1.15

- **6.3 A new component **Field Label Overrider!****

Version 1.16

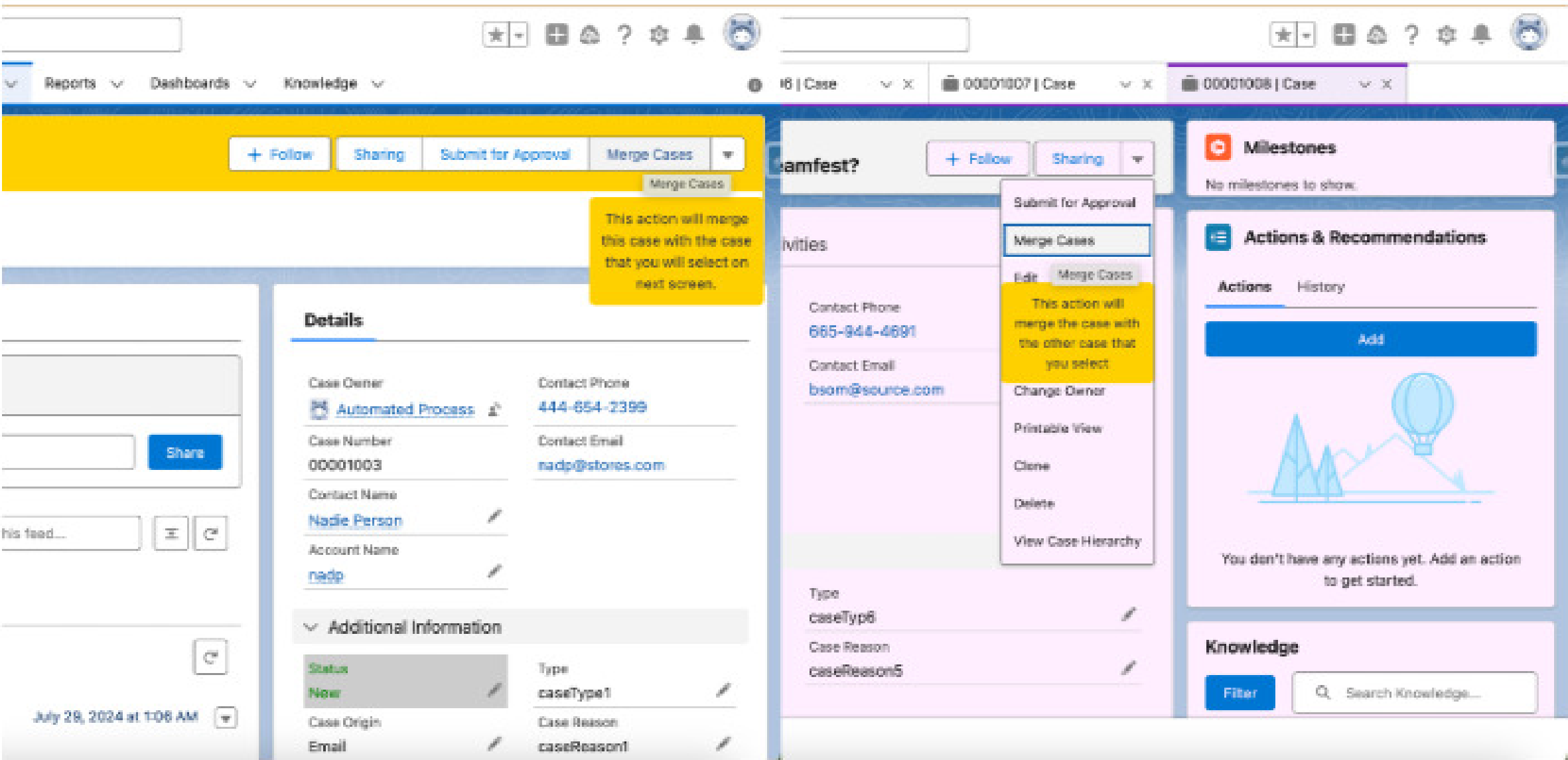
- **6.4 Introducing *Font Weight Setting* in Field Highlighter Component**

6.1 Contextual Help Component

This powerful component is designed to equip users with all the critical information they need directly on the Salesforce record page. Before clicking any header button, users can easily **access contextual guidance through hover tooltips**, ensuring they understand the action they are about to take.

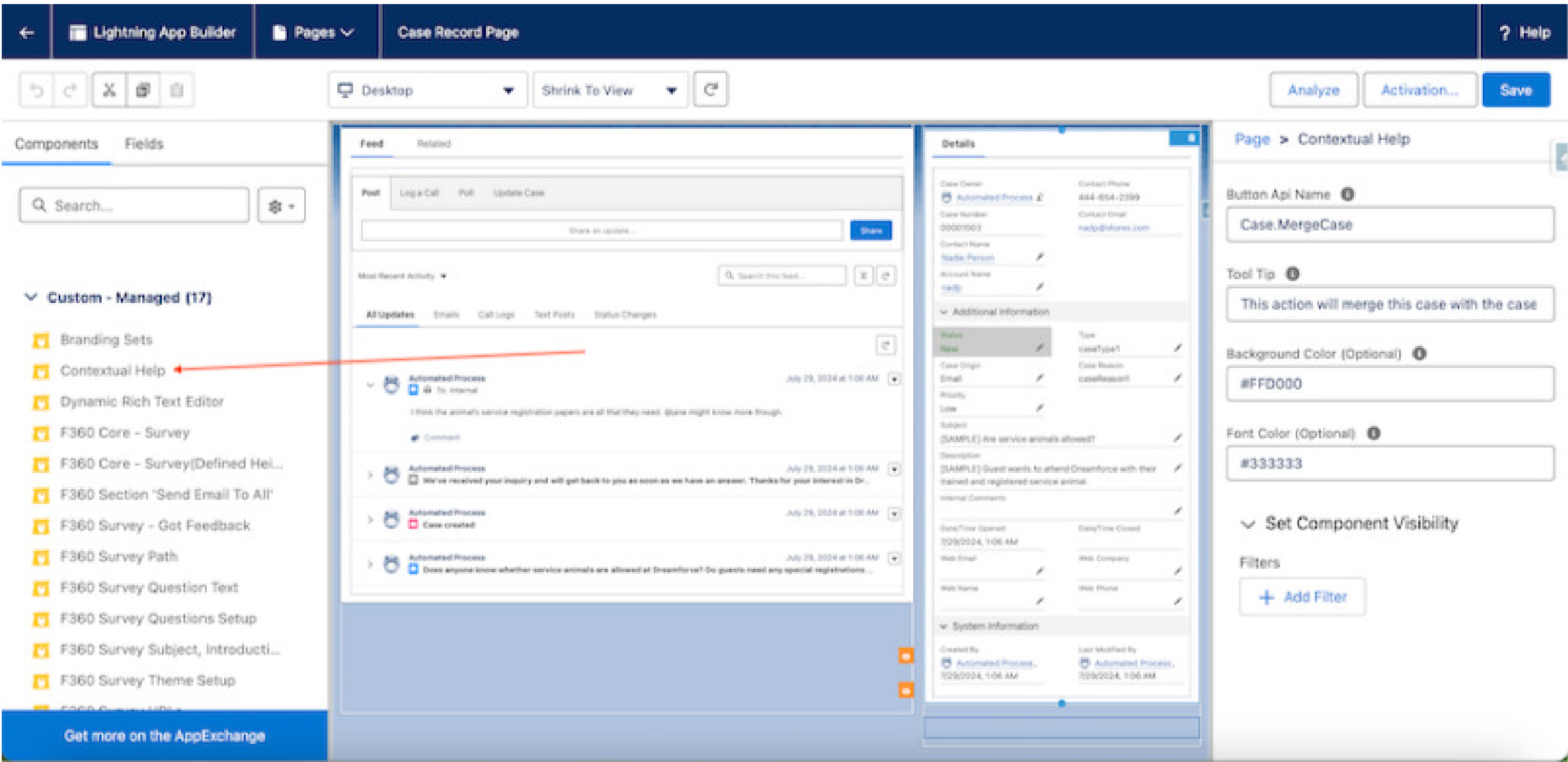
Gone are the days of uncertainty and confusion—this feature delivers clear and concise instructions, reducing the likelihood of errors and enhancing overall user confidence. By providing this upfront information, the **Contextual Help component not only**

streamlines workflows but also empowers users to work more efficiently and effectively, making their interactions with Salesforce smoother and more intuitive.



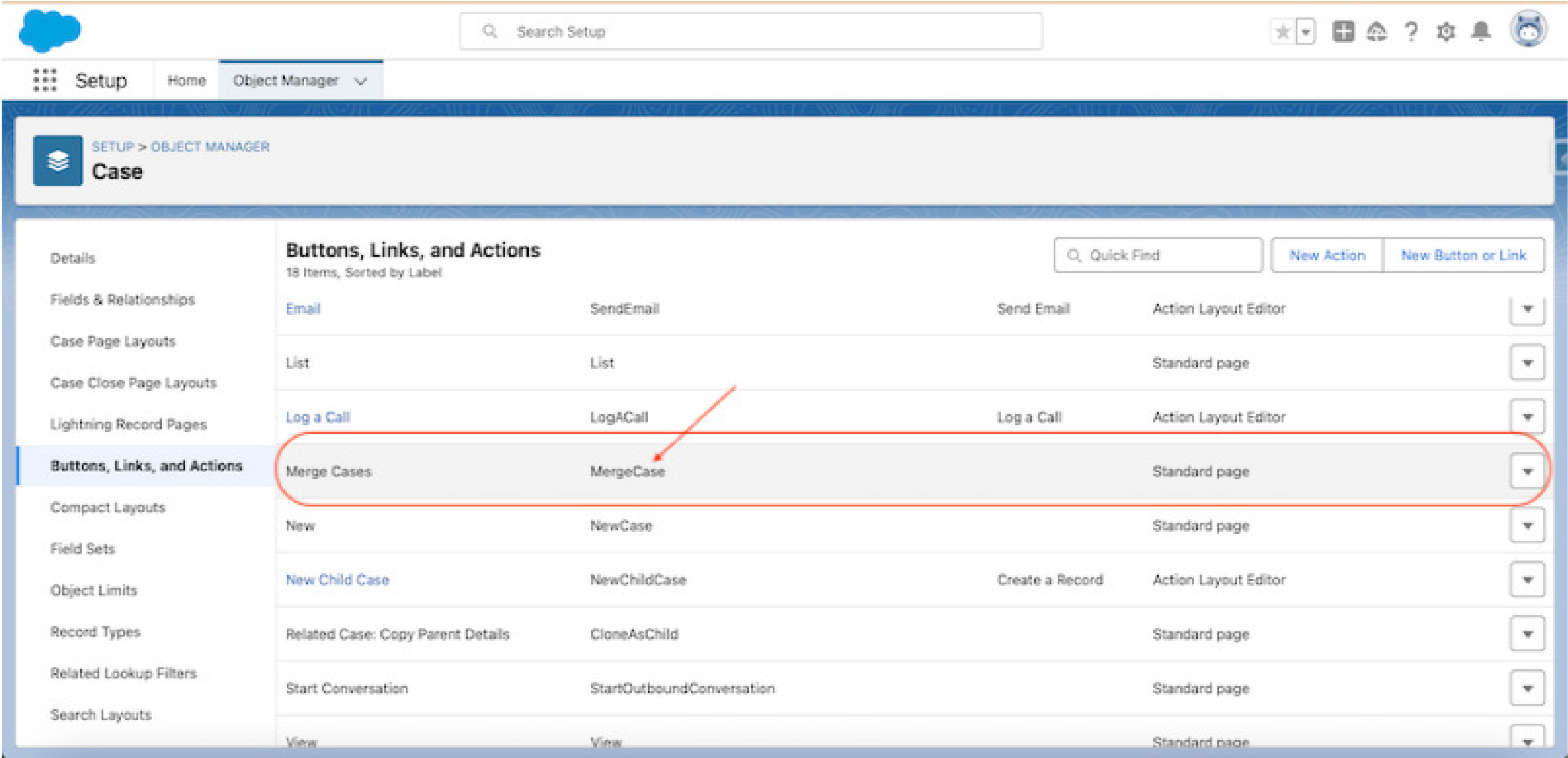
### Accessing the Contextual Help Component

- After Installation of version 1.13, you will notice a new component '**Contextual Help**' in the App Builder, under the custom managed components on the left side bar.
- Simply drag and drop the component onto the page where you'd like the tooltip to appear for a header button.



### Configuring the component

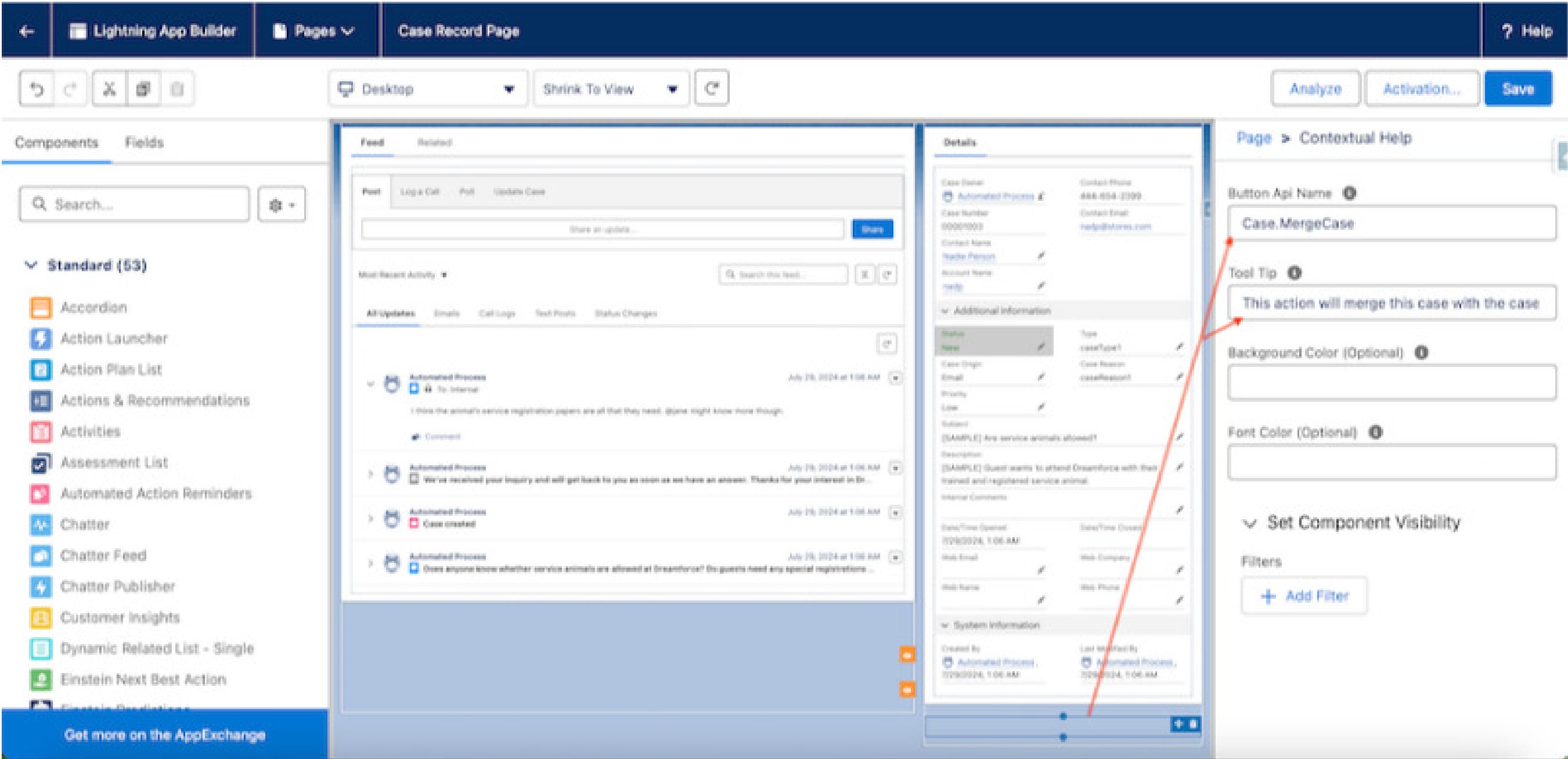
- Before we start configuring the component, capture the api name of the displayed button on which you intended to display contextual help tooltip.
  - Go to Object Manager
  - Select the related object.
  - Select Button, Links, and Actions in the side bar.
  - Find your button and its api name.



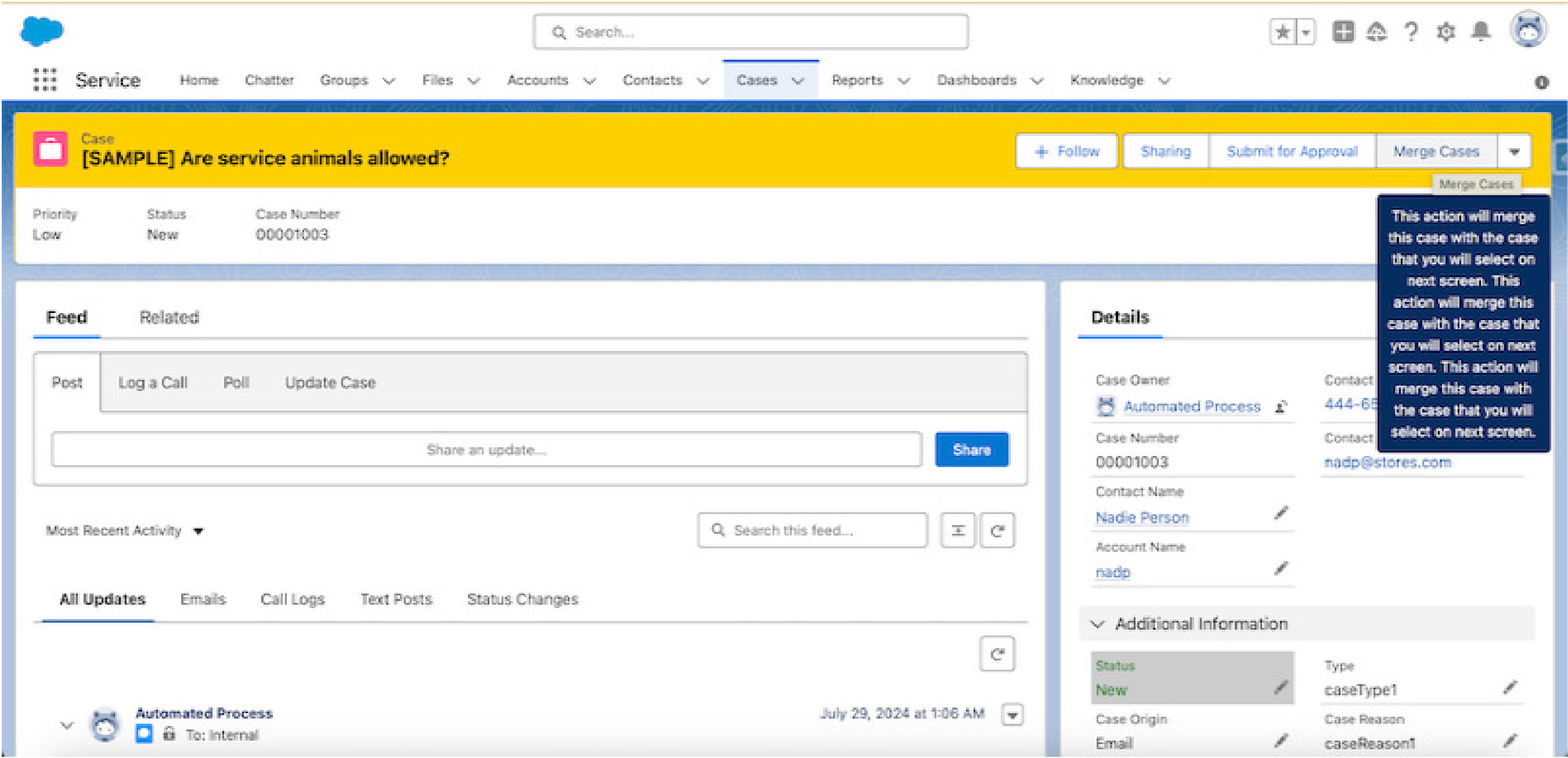
- **Provide a value in Button Api Name property.** Button Api Name is a combination of ObjectApiName.ButtonApiName. Make sure you capture the correct api names for object and button; For reference, some of the sample button api names below:



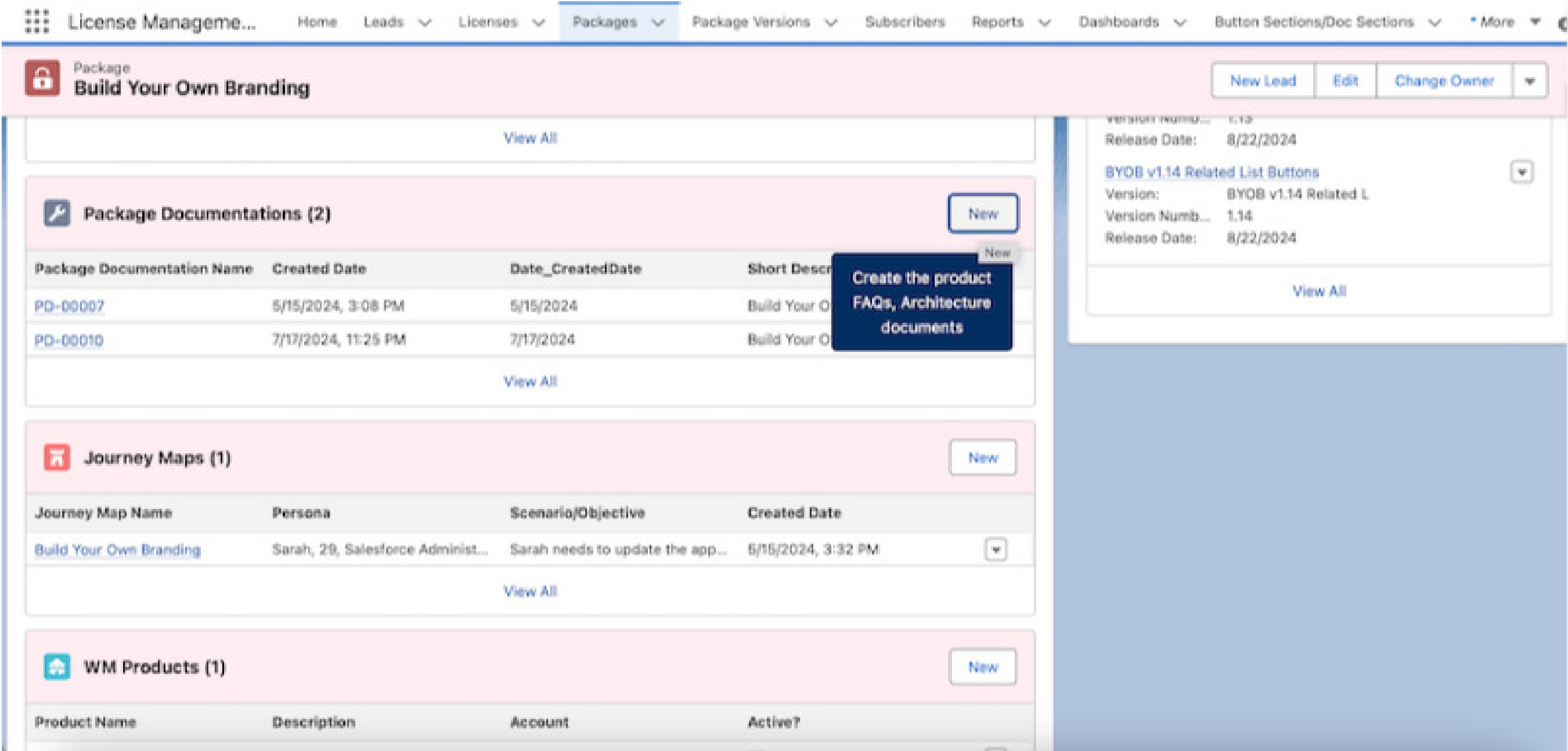
- Case.MergeCase
- Lead.Custom\_Lead\_Conversion
- Lead.pkg\_\_Custom\_Lead\_Conversion
- pkg\_\_Lead.pkg\_\_Custom\_Lead\_Conversion
- **Tool Tip:** The message that will be displayed on the hover of button.
- **Background Color:** Optional. Set the background color of tool tip message. Supports name, hex, rgb, rgba.
- **Font Color:** Optional. Set the font color of text in tool tip message. Supports name, hex, rgb, rgba.



Use case: A hint to the agent, before pushing Merge Cases button.

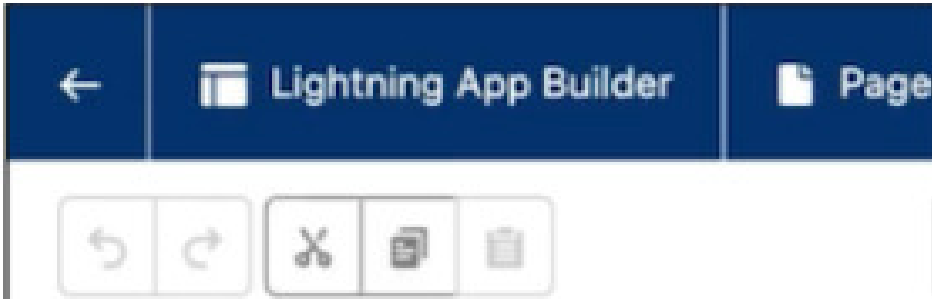


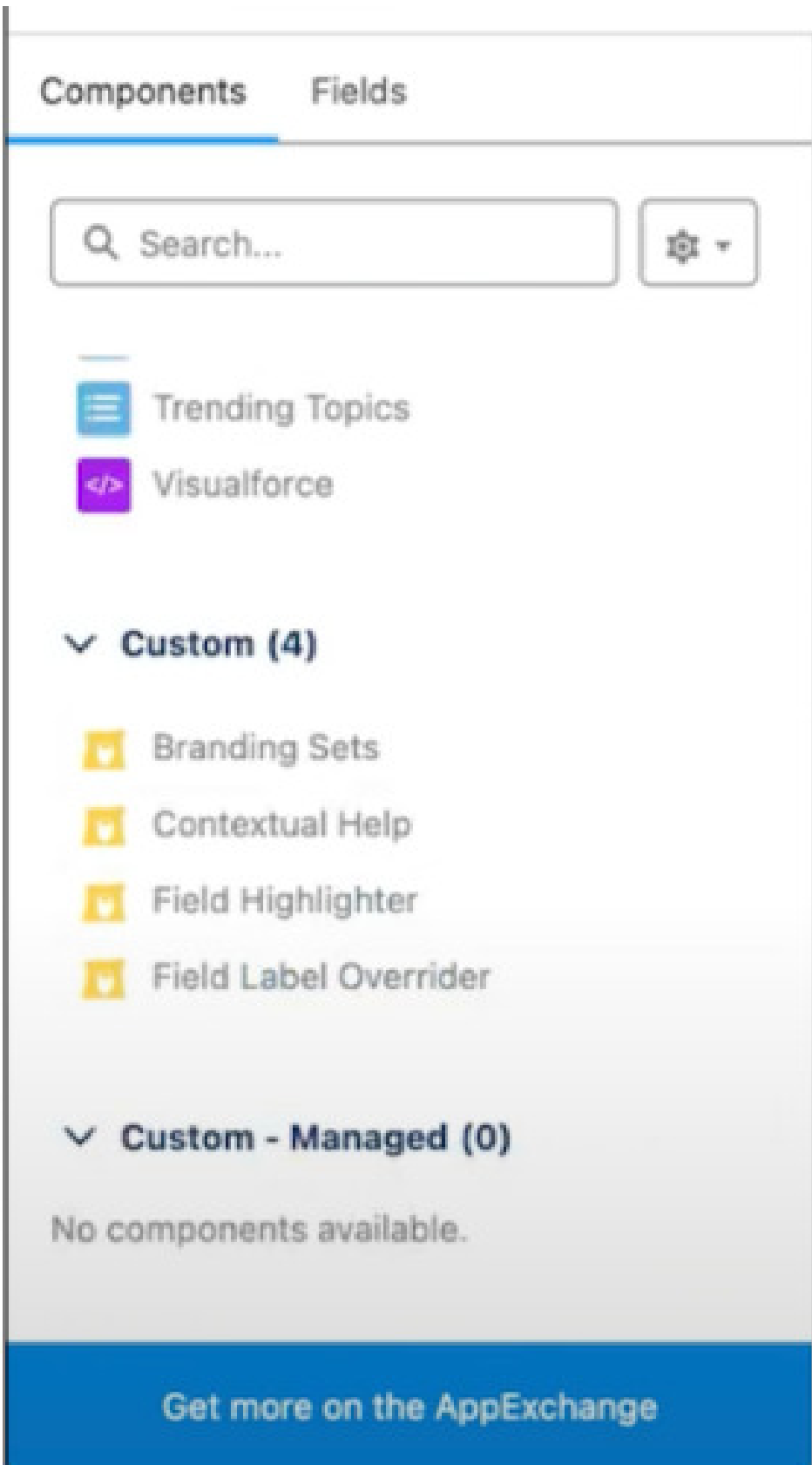
## 6.2 Support for Related List Button within Contextual Help Component



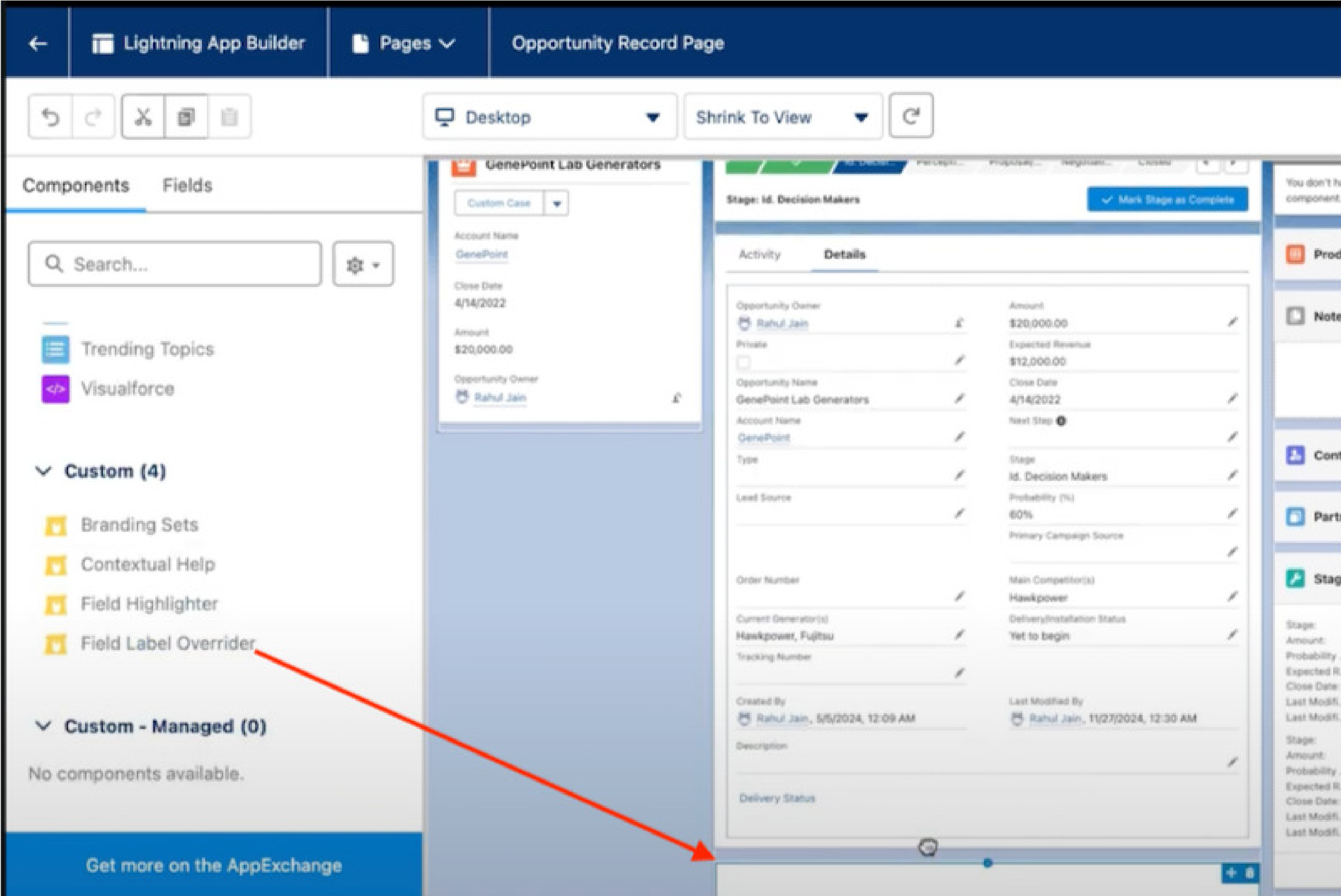
## 6.3 Field Label Overrider

- Find a new Field Label Overrider component in the App Builder.

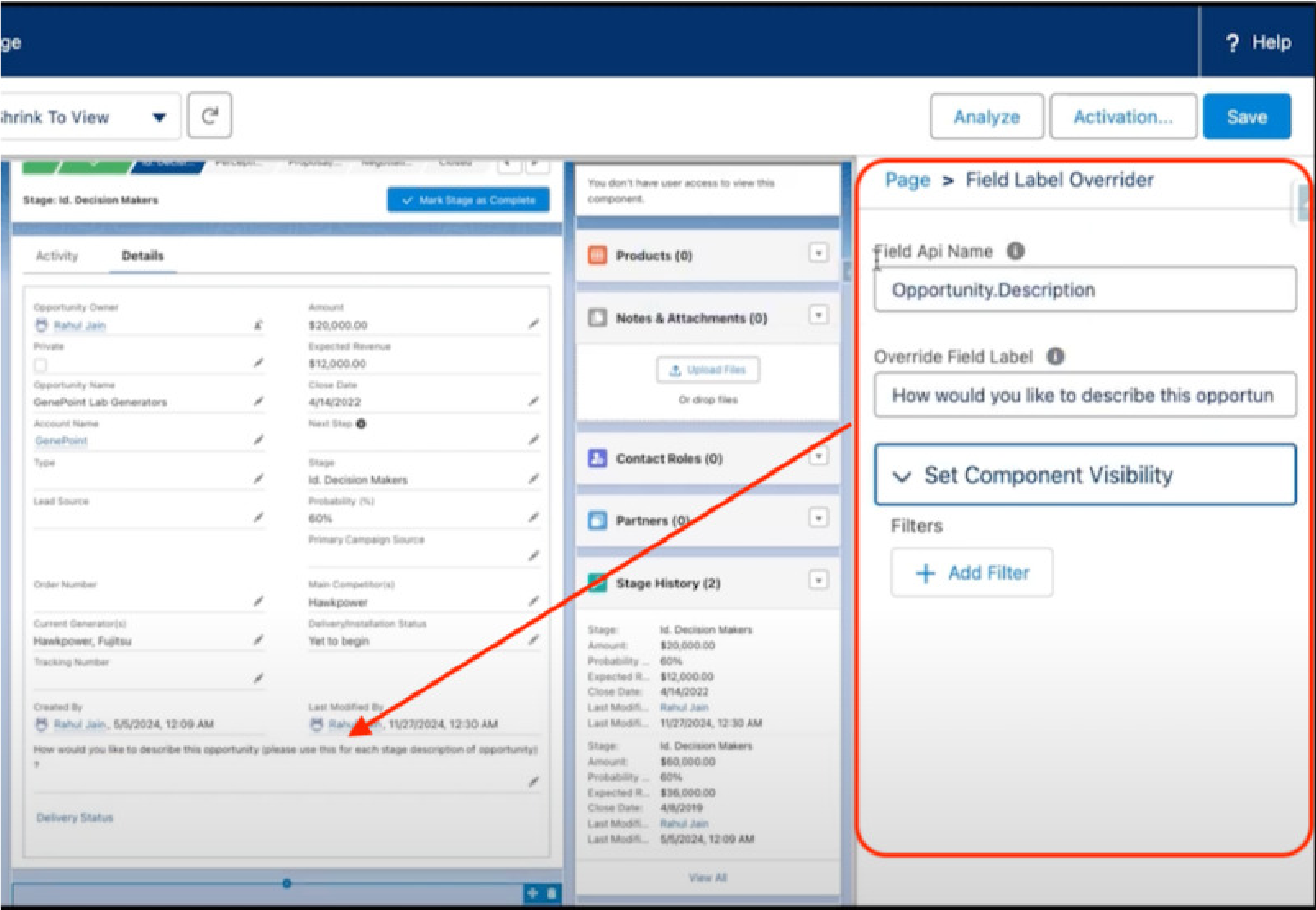




- Just Drag and Drop the Field Label Override as the last component on the page.



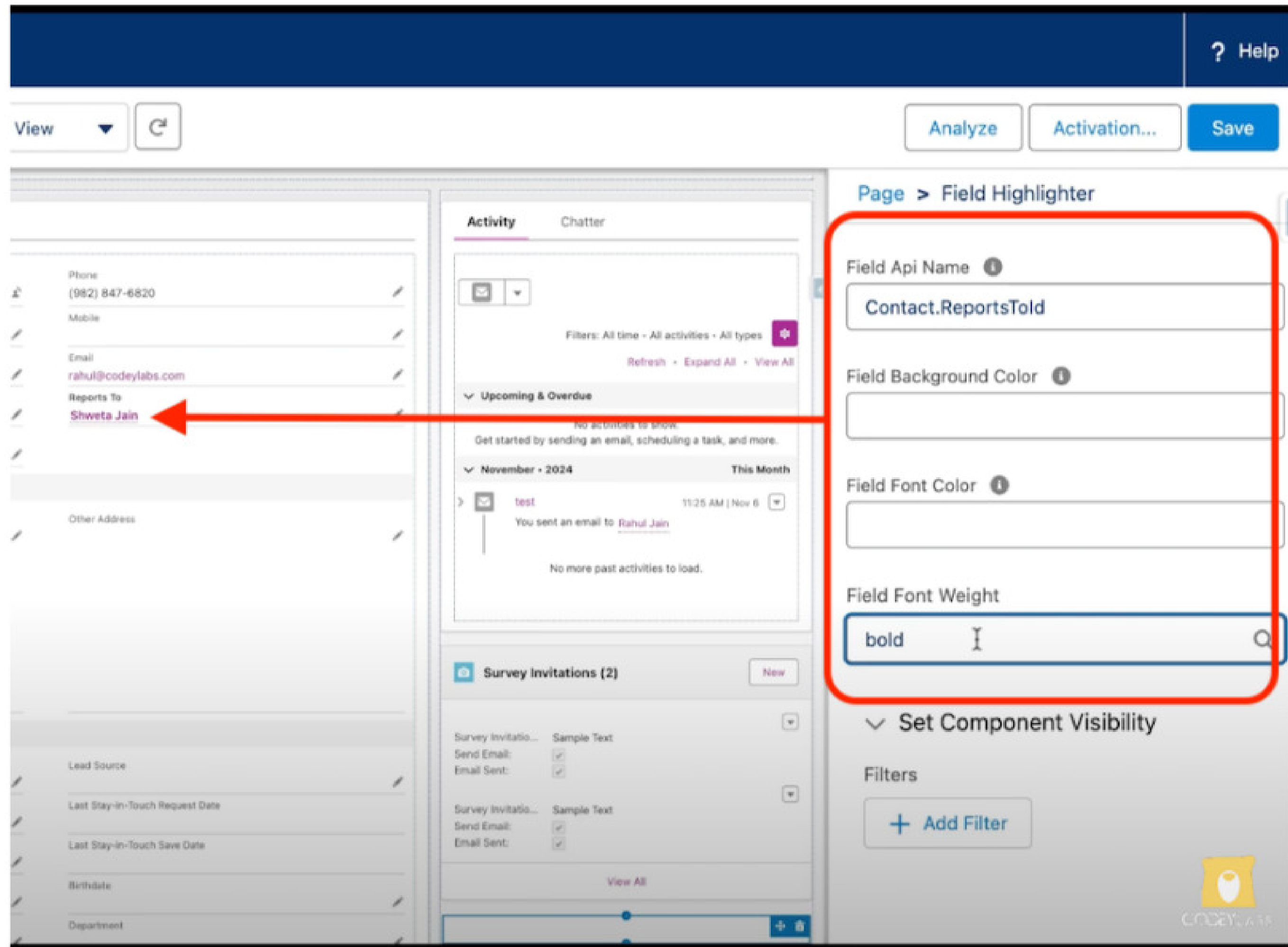
- Define the Field Api Name and the Label to Override





## 6.4 Introducing *Font Weight Setting* in Field Highlighter Component

- Just Drag and Drop the field highlighter component.
- Define the Field Api Name (off course prefixed with dot and Object Api Name)
- And select the field font weight from the dropdown to apply.



## 7. Troubleshooting & FAQs

### 7.1 Common Issues and Solutions

- **Color Persistence Issue:** Ensure that changes are saved properly in the App Builder.
- **Field Highlighting Not Visible:** Double-check that the conditions for highlighting are met.

### 7.2 Frequently Asked Questions

#### What is Build Your Own Branding?

Build Your Own Branding is a Salesforce managed package **available at \$79 per month for a site** that includes Branding Sets and Field Highlighter, allowing users to customize record page appearances and highlight important fields.

#### How do I apply a color scheme to a record page?

Use the Branding Sets component in the App Builder to customize colors for your record pages.

#### Can I use Build Your Own Branding in the Salesforce console app?

Yes, both Branding Sets and Field Highlighter are fully compatible with the Salesforce console app.

#### What are some common use cases for these components?

Common use cases include corporate branding, departmental customization, event-specific branding, and highlighting critical fields for better visibility.

## 8. Support & Resources

### 8.1 Contacting Support

For any issues or questions, contact our support at [info@codeylabs.com](mailto:info@codeylabs.com)!

### 8.2 Additional Resources

- User Guide: [Link to User Guide](#)
- Video Tutorials: [Link to Tutorials](#)
- Pricing Information: [Available at \\$79 per month for a site.](#)

**About CodeyLabs**

CodeyLabs is a pioneer brand dedicated to enhancing the Salesforce ecosystem through innovative and customizable solutions. Our mission is to empower businesses by transforming their Salesforce experience, ensuring it aligns perfectly with their brand and operational needs. We specialize in delivering tailored solutions that optimize user interaction and streamline workflows. Committed to innovation and customer satisfaction, CodeyLabs delivers exceptional value, enhances productivity, and fosters a seamless user experience. Join us on the journey to revolutionize your Salesforce platform and unlock its full potential.

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