AgentOne Tab Configuration

Description:

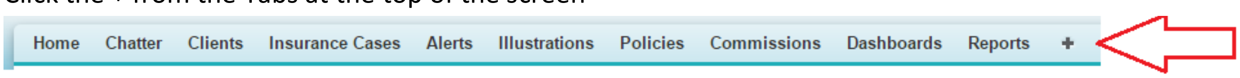
The *AgentOne* tab includes multiple configurable sections that display relevant information on your clients and their related cases. After installation you should see a tab labeled “AgentOne” immediately following the Home tab at the top of the screen.

Without initially creating the configuration file when the tab is clicked the error, *“The page cannot be loaded due to a configuration error on the AgentOne page.”* will be displayed.

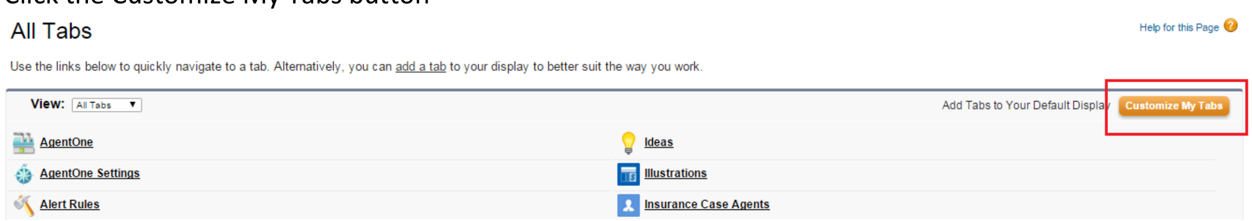
Adding the AgentOne Tab

If you are upgrading from a previous version and do not see the AgentOne tab you should perform the following steps:

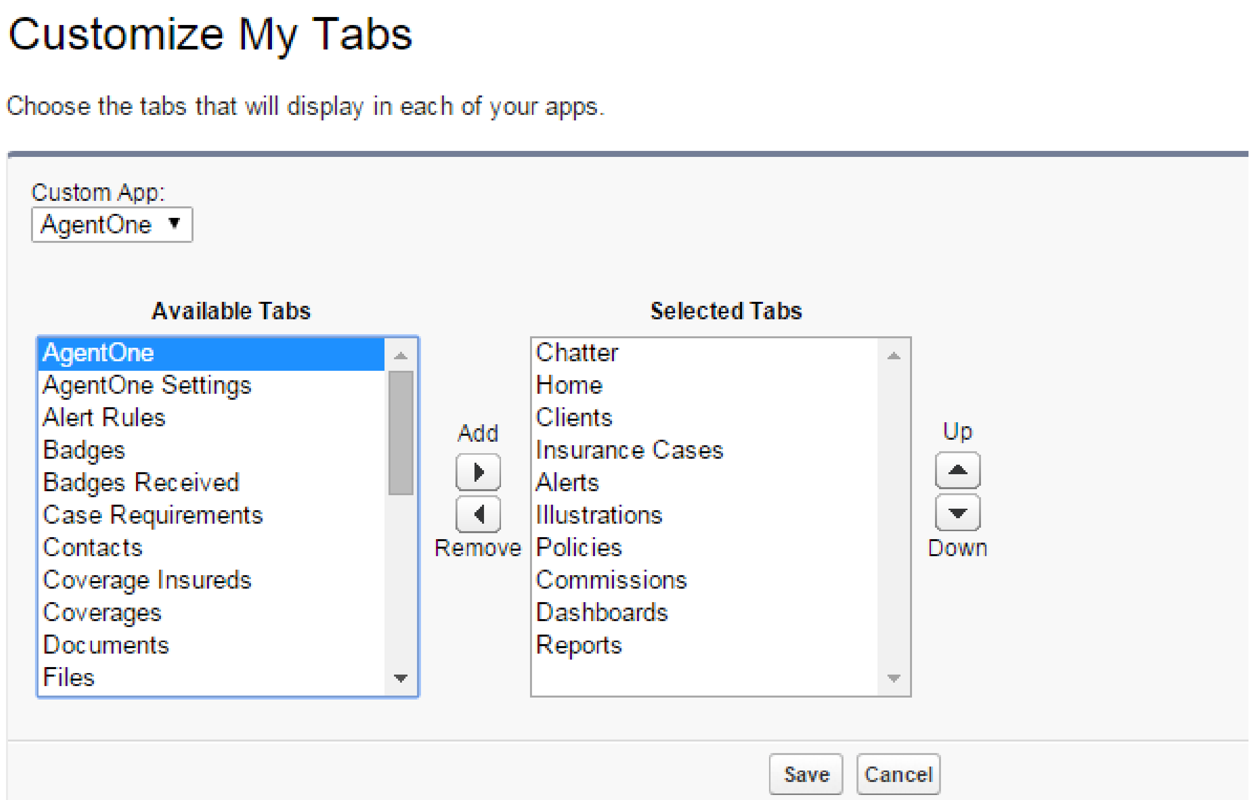
1. Click the + from the Tabs at the top of the screen



2. Click the Customize My Tabs button

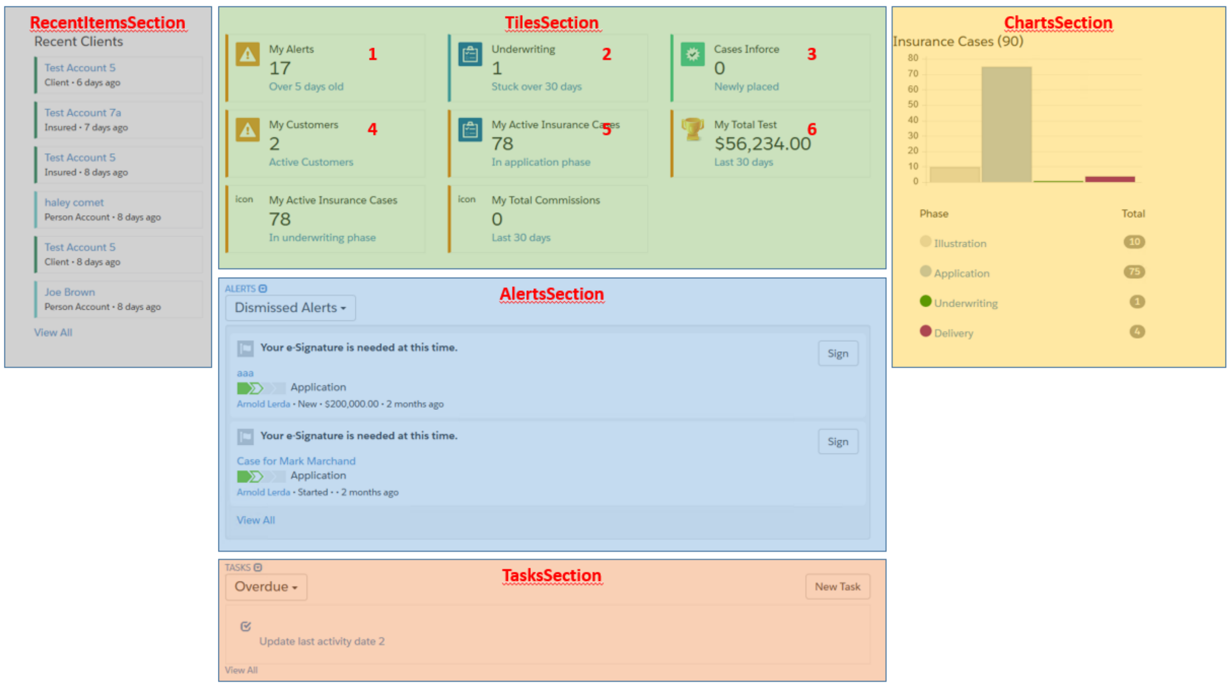


3. From the Customize My Tabs screen move the AgentOne tab to the Selected Tabs section and position it immediately after the Chatter tab



Configurable Items on the AgentOne Tab

The AgentOne tab is separated into the following components. This section describes the various components and what customizations are available for each section.



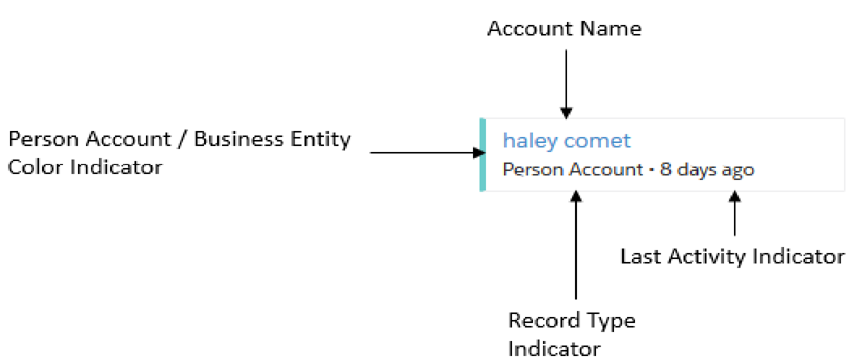
Recent Clients

This section displays the most recent clients that have had some activity (up to a maximum of 15) you can change the value on the ItemCount field from the *RecentItemsSection* (see highlighted below):

```
{
    "RecentItemsSection" : {
        "ItemCount" : 6
    },
```

Anatomy of Recent Clients

The recent clients section displays the name and record type of the account as well as the last activity period.



Tiles

To configure the number of visible tiles (up to a maximum of 9) you can change the value on the TileCount field from the *TilesSection* (see highlighted below):

"TilesSection" : {
"TileCount" : 3,

To configure elements within each individual tile in the tiles section you can change the values in each node as outlined below:

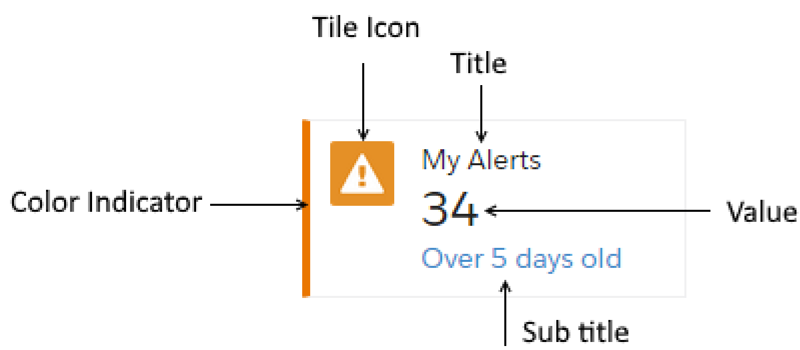
{
"Name" : "Cases with Recent Activity",
"TileObject" : "AgentOne__InsuranceCase__c",
"SubTitle" : "Recent Activity",
"ColorInd" : "#EA7600",
"Icon" : "/img/icon/trophy32.png",
"ListViewId" : "00Bo0000000wfi3",
"AggregateFunc" : "Avg",
"AggregateField" : "coverageamount__c",
"AggregateResultFormat" : "Currency"
},

Node Name	Description
`TilesSection`	Defines the configuration section for the home page tiles
`TilesSection.TileCount`	Defines the maximum number of tiles displayed. If this is zero then the entire tiles section will not be displayed. If the TileCount is greater than the actual number of tiles specified then the actual number will be displayed.
`TilesSection.Tiles`	Is an array of Tile configuration
`TilesSection.Tiles[n].Name`	Defines the Title of the tile.
`TilesSection.Tiles[n].TileObject`	The Salesforce object API name that the current tile references.
`TilesSection.Tiles[n].SubTitle`	If specified defines the sub title of the tile. If it is left empty, the ListView name will be used.
`TilesSection.Tiles[n].ColorInd`	Defines color used by the Tile color indicator (Compatible with CSS).
`TilesSection.Tiles[n].Icon`	Defines the icon image used by the tile. This should be the relative path name in a package or the path name for a default salesforce icon or the developer name for a document.
`TilesSection.Tiles[n].IconResourceType`	If specified, defines the icon resource package where the icon file is located or the literal string "document__type" to indicate that the icon is stored as a document.
`TilesSection.Tiles[n].ListViewId`	Defines the id of the list view associated with the Tile. Required.

`TilesSection.Tiles[n].AggregateFunc`	If specified, defines the aggregate function used to calculate the value figure. Default is “Count”. Supported values are: [avg | count | count_distinct | min | max | sum]
`TilesSection.Tiles[n].AggregateField`	If the above aggregate Function is something other than count then this node should define the field that is used in the aggregation function.
`TilesSection.Tiles[n].AggregateFieldFormat`	If the above aggregate field refers to a currency value then this field can be used to specify a different format for that aggregation. Currently only “currency” is supported.

Tile Anatomy

Each tile must have a view associated with it. The value is calculated on-the-fly based on the query for the view.



Alerts

The alerts section displays the alerts views. By default the My Alerts view will be displayed but cookies are used to maintain the last selected view.

Alerts can be enabled or disabled using the configuration. If the alerts are disabled then the entire alerts section will be removed.

"AlertsSection" : {
"enabled" : true
},

Tasks

The tasks section displays the tasks views.

Tasks can be enabled or disabled using the configuration. If the tasks are disabled then the entire tasks section will be removed.

"TasksSection" : {

```
        "enabled" : true
    },
```

Charts

The charts section displays a bar chart of the current insurance cases grouped by phase.

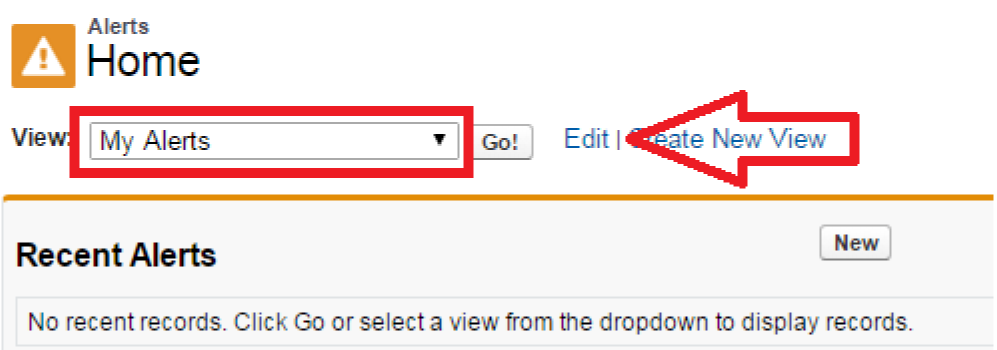
You can configure the colors that are assigned to each of the four different phases.

```
    "ChartsSection" : {
        "InsuranceCaseChart" : {
            "IllustrationColor" : "aliceblue",
            "ApplicationColor" : "darkgray",
            "UnderwritingColor" : "cornflowerblue",
            "DeliveryColor" : "darkslateblue"
        }
    }
```

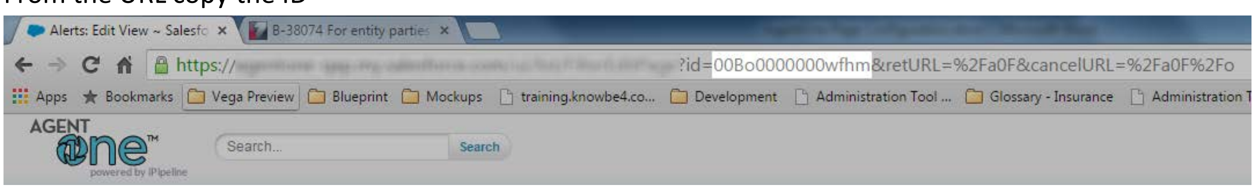
How to Identify the ListViewID

To identify the ‘ListViewID’ for a specific view to be used in the configuration of your tiles you must follow these steps:

1. While logged in as an administrative user select the view for the sObject and click Edit



2. From the URL copy the ID



3. Go to https://www.adminbooster.com/tool/15to18 and convert the 15 character ID to 18 character ID
4. Copy the 18 character ID and paste in the ListViewID from the config file

Creating the Configuration File

To create the configuration file you must perform the following steps:

1. Create a new text file (the name of the file is irrelevant)
2. Copy the following text to the new text file:


```
{
	"RecentItemsSection" : {
		"ItemCount" : 6
	},
	"TilesSection" : {
		"TileCount" : 3,
		"Tiles" : [
			{
				"Name" : "My Alerts",
				"TileObject" : "AgentOne__Alert__c",
				"SubTitle" : "Over 5 days old",
				"ColorInd" : "#EA7600",
				"Icon" : "assets/img/Icon_Alert.png",
				"IconResourceType" : "NgBS_Homepage",
				"ListViewId" : "00Bo0000004H5oKEAS"
			},
			{
				"Name" : "Underwriting",
				"TileObject" : "AgentOne__InsuranceCase__c",
				"SubTitle" : "Stuck over 30 days",
				"ColorInd" : "#298FC2",
				"Icon" : "assets/img/Icon_CsUnderwriting.png",
				"IconResourceType" : "NgBS_Homepage",
				"ListViewId" : "00Bo0000004H5oP",
				"AggregateFunc" : "Count"
			},
			{
				"Name" : "Cases Inforce",
				"TileObject" : "AgentOne__InsuranceCase__c",
				"SubTitle" : "Newly placed",
				"ColorInd" : "#38C288",
				"Icon" : "assets/img/Icon_CsInforce.png",
				"IconResourceType" : "NgBS_Homepage",
				"ListViewId" : "00Bo0000004H5oU",
				"AggregateFunc" : "Count"
			},
			{
				"Name" : "Cases with Recent Activity",
				"TileObject" : "AgentOne__InsuranceCase__c",
				"SubTitle" : "Recent Activity",
```

```
                    "ColorInd" : "#EA7600",
                    "Icon" : "/img/icon/trophy32.png",
                    "ListViewId" : "00Bo0000000wfi3",
                    "AggregateFunc" : "Avg",
                    "AggregateField" : "coverageamount__c",
                    "AggregateResultFormat" : "Currency"
                },
                {
                    "Name" : "My Customers",
                    "TileObject" : "Account",
                    "SubTitle" : "Active Customers Added this week",
                    "ColorInd" : "#EA7600",
                    "Icon" : "agent_24x24",
                    "IconResourceType" : "document__type",
                    "ListViewId" : "00Bo00000033AJ4",
                    "AggregateFunc" : "Count"
                }

            ]
        },
        "AlertsSection" : {
            "enabled" : true
        },
        "TasksSection" : {
            "enabled" : true
        },
        "ChartsSection" : {
            "InsuranceCaseChart" : {
                "IllustrationColor" : "aliceblue",
                "ApplicationColor" : "darkgray",
                "UnderwritingColor" : "cornflowerblue",
                "DeliveryColor" : "darkslateblue"
            }
        }
}
```

3. Save the text file

Creating the Static Resource Record

To create the static resource record and select the configuration file you must perform the following steps:

1. While logged in as an administrative user go to Setup then Navigate to *App Setup -> Develop -> Static Resources*
2. Click *New* in order to create a new static resource record
3. Enter the following:

   a. Name: AgentOne_HomePage_Cfg
   b. Description (optional): AgentOne Tab Configuration
   c. Cache Control: Public
4. Click the *Choose File* button and browse to and select the text file previously created
5. Click *Save*

Allowing Web Service Calls

To add the the target site as a remote site for the AgentOne tab you must perfom the following steps:

1. While logged in as an administrative user go to Setup then Navigate to Administration Setup -> Security Controls -> Remote Sites and click *New Remote Site*
2. Provide a name for the new remote site (e.g. "SFDCLocalWebService")
3. Enter the URL to your instance of salesforce.com