

Customization & Enhancement Guide

Using This Document

These simple customizations are required for full functionality of the Birthday Reminder sidebar component.

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1. Install the Birthday Reminder Package from the AppExchange

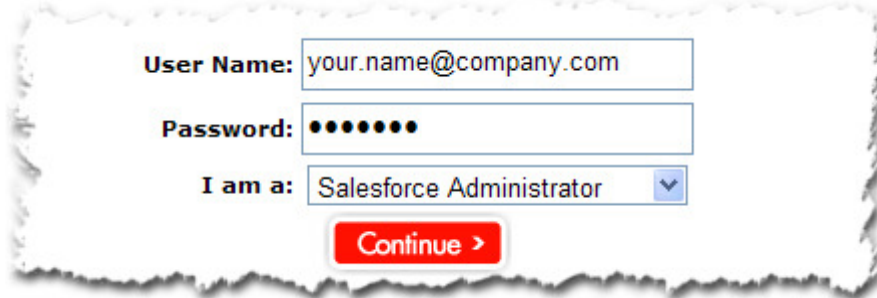
What: **Install the Birthday Reminder package**

Why: Moves actual AppExchange package contents for Birthday Reminder functionality into your Salesforce org.

How: Click the "Get It Now" button from the Birthday Reminder AppExchange Listing

Sign in to the Salesforce org where you would like the application installed

You will be prompted for the login credentials for a Salesforce org. Please provide the username and password for the org in which you would like to install the Birthday Reminder sidebar component. Then click the **Continue** button.



A screenshot of the Salesforce login interface. It features three input fields: "User Name:" with the text "your.name@company.com", "Password:" with seven black dots, and "I am a:" with a dropdown menu showing "Salesforce Administrator". Below these fields is a red button with the text "Continue >".

Agree to the Terms & Conditions

The page will prompt you to select whether the package will be installed into a Production or Sandbox org. Additionally, it will display the terms of the package installation and you will be prompted to agree with the terms by clicking the "agree" checkbox.

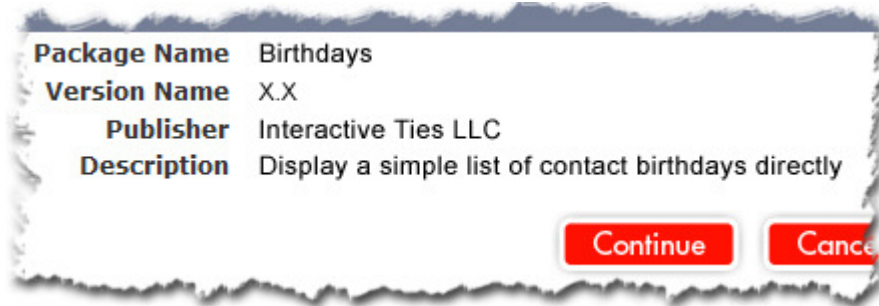


A screenshot of the Terms & Conditions agreement screen. It shows a checkbox that is checked, followed by the text: "I have read and agree to the terms and conditions. If salesforce.com, Salesforce Labs, then the application is not provided or warranted by salesforce.com. This application is not intended to be used to access your or your company's data in the salesforce.com system. To the extent of the transmission of such data out of the salesforce.com system, salesforce.com is not responsible for the privacy, security or integrity of that data." Below this text is a red button with the text "Continue >".

Install Birthday Reminder Package (continued...)

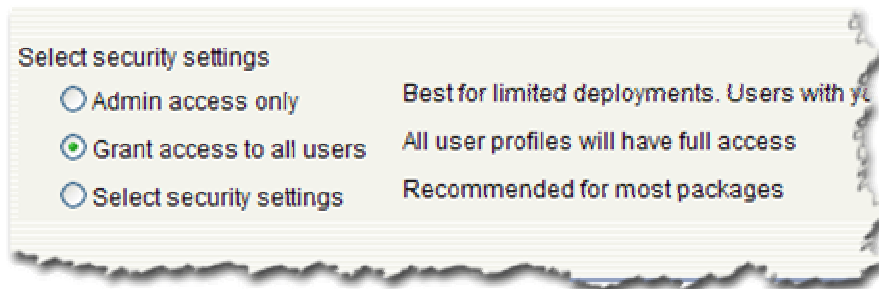
[Review the package installation details](#)

The page will display all the contents of the package you are about to install. This page is merely informational. Click **Continue**.



[Step Through the Package Installer](#)

1. Approve API Access for the Package - the first step of a three step process is to approve the API Access required to run the Birthday Reminder sidebar component. Simply click the **Next** button.
2. Choose the Security Level – the second step will allow you to update your existing Salesforce profiles with access to the contents of the package. Since the Birthday Reminder sidebar component can only be accessed from the included Home tab component, you should select the **Grant Access to All Users** option and click the **Next** button.



3. Install the Package – the last step in the process is to actually install the contents of the package with the settings you made in the previous steps. Be sure to check the box reading "Ignore Apex test failures that may cause the installed application not to function properly." Then click the **Install** button.

Upon successful installation of the package you will be directed to an Install Completion page. Simply click the **View Package Contents** button.

2. Add the “Birthday Criteria” & “Birthday Range” Fields to Your User Page Layout(s)

What: **Add new custom fields to User page layout(s)**

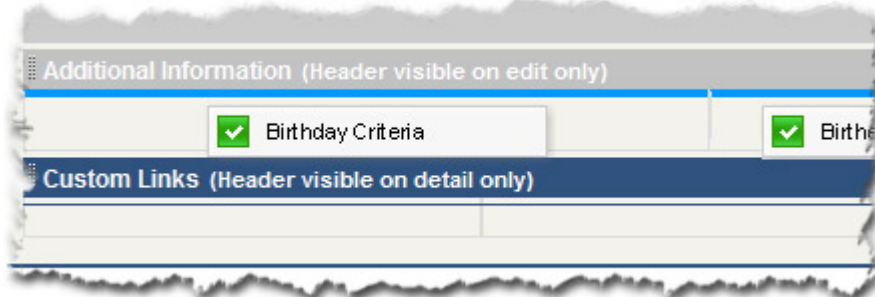
Why: Allows for personal settings related to the Birthday Reminder sidebar component to be updated from the User record.

How: Add the “Birthday Criteria” & “Birthday Range” fields to the User page layout(s)
The User Page Layout is modified by going to: **Setup > Customize > Users > Page Layouts**

The page will display all the Page Layouts for User records - click the **Edit** link located on the left-hand side of the User Page Layout name.

Select the “Birthday Criteria” custom field from the box at the top of the page reading **User Layout**.

Drag the field selection to the Additional Information page layout section towards the bottom of the screen.



Select the “Birthday Range” custom field from the box at the top of the page reading **User Layout**.

Drag the field selection to the Additional Information page layout section towards the bottom of the screen.

Click the **Save** button at the top of the page.

Note: If your organization uses multiple page layouts for User records then you may have to repeat the above steps for each page layout.

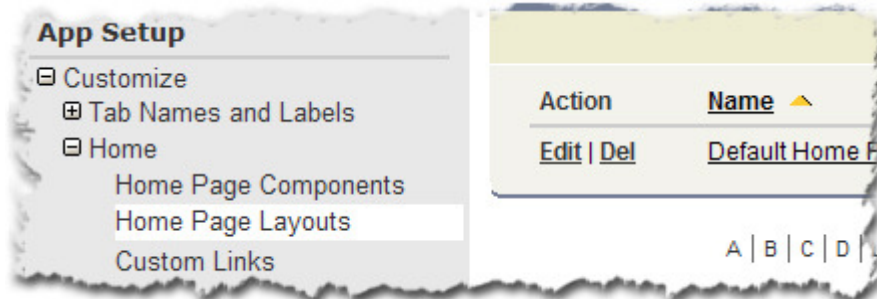
3. Add the Upcoming Birthdays Component to Your Home Page Layout(s)

What: Update Home Page Layouts with the Upcoming Birthdays Component

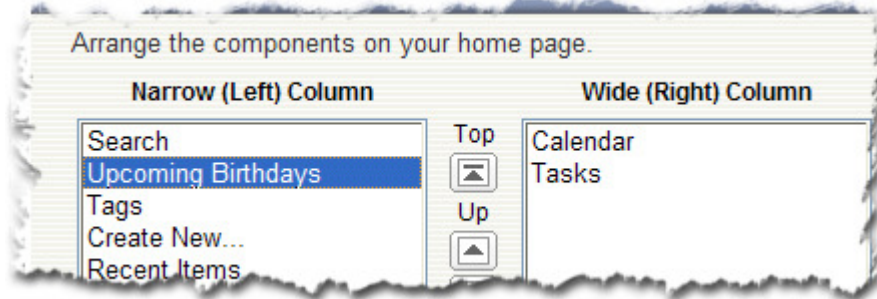
Why: Required for viewing the reminders.

How: Update Home Page Layout(s)
 The Home Page Layout is modified by going to: **Setup > Customize > Home > Home Page Layouts**

The page will display all the Page Layouts for the Home tab - click the **Edit** link located on the left-hand side of the Home Page Layout name.



Check the box next to **Upcoming Birthdays** under the section of the page reading "Select Narrow Components to Show." Click **Next**. Use the selectors to move the Upcoming Birthdays component to the top of the page or into whatever order makes sense for the page layout.



Click the **Save** button.

Note: If your organization uses multiple page layouts for the Home tab you may have to repeat the above steps for each page layout.

4. (OPTIONAL) Enable Custom Sidebar Components on All Pages

What: **Add visibility to the Birthday Reminder sidebar component on all pages**

Why: Optional steps to allow for visibility of custom sidebar components on all pages.

How: [Update the User Interface Settings](#)

The User Interface can be updated by going to: **Setup > Customize > User Interface**

The page will display all the User Interface functionality for the org.

Check the box next to **Show Custom Sidebar Components on All Pages** under the "Sidebar" section.

Click the **Save** button.