

Abstract

Display a simple list of contact birthdays directly inside the Salesforce sidebar.

Description

Customers appreciate positive communication and what better way to let a customer know they are important to your business than by sending them a Happy Birthday card or Email? With this sidebar component you will see a list of contact birthdays occurring within a customizable range of days.

The compact design of this application allows for unobtrusive notification to your users. It is easy to navigate and provides single-click access to the contact information. Best of all this application is 100% native so it can be installed in almost any Edition of Salesforce.

Each user can customize the application to display "All Contacts" or only "My Contacts" so the list of contacts displayed can be relevant to each of your employees. Furthermore, each user can designate the number of days in advance of each birthdate that they prefer to be notified. Each user can modify their personal settings to allow notifications anywhere from 1 to 99 days in advance of each birthdate.

Features & Benefits

- Display contact name and birthday to users on their Salesforce sidebar.
- Listing constantly updates based on each individual user's settings.
 - Show "All Contacts" or only "My Contacts."
 - Be alerted from 1 to 99 days in advance of each birthdate.
- Earliest birthdays are listed first so you'll always know which ones are coming up before the others.
- Unobtrusive to users: one-click paging functionality allows for many birthdays to be listed but only three (3) to be displayed at a single time.

Highlights

Name	Description	Type
Birthday Criteria	Custom field definition on User, which indicates if sidebar component should display "All Contacts" or "My Contacts."	■
Birthday Range	Custom field definition on User, which denotes the number of days in advance of the birthday to be reminded.	■
birthdays	Visualforce page and Apex class that perform the logic and illustration of birthdays in the sidebar.	☰ ●
settings	Visualforce page, which allows for manipulation of custom User fields.	☰
Upcoming Birthdays	Sidebar component which displays the Visualforce pages and provides the application functionality.	✕
userExtension	Apex class that allows for updates to take place when user interacts with "settings" Visualforce page.	●


■ = Custom Field, ☰ = Custom Tab, ● = Apex Class, ◆ = Custom S-Control
 ☰ = Visualforce Page, ✕ = Home Page Component

Requirements

Salesforce.com Edition Unlimited, Enterprise, Professional, Group & Developer

Specifications

Publisher Interactive Ties LLC
Type Native
Salesforce.com Certification Certified
Pricing \$500 USD



BirthdayReminder

by Interactive Ties

[Setup](#) · [Help](#) · [Logout](#)

Home
Leads
Accounts
Contacts
Opportunities

Search

Search All ▼

Go!

Limit to items I own

[Advanced Search...](#)

Upcoming Birthdays

28 Feb [Eric Lindros](#)

3 Mar [Jessica Biel](#)

6 Mar [Shaquille O'Nea...](#)

[Settings](#) [« prev](#) | [next »](#)

Demo User at Interactive Ties LLC

Sunday February 22, 2009


Birthday Reminder Highlights

Features

Be notified, via sidebar component, as the birthdate of each Salesforce contact approaches.

100% Native: works in Unlimited, Enterprise, Professional, Group & Developer Editions.

Unobtrusive to users: one-click navigation displays three contact names & birthdates at a time.



Each user can customize to meet individual needs:

- Show "All Contacts" or only "My Contacts."
- Be alerted from 1 to 99 days in advance of each birthdate.

Calendar [Calendar Help](#) ?

Today 2/22/2009

You have no events scheduled for the next 7 days.

◀
February 2009
▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

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