

Customization & Enhancement Guide

Using This Document

These simple customizations are required for full functionality of the Hebrew Reminders application.

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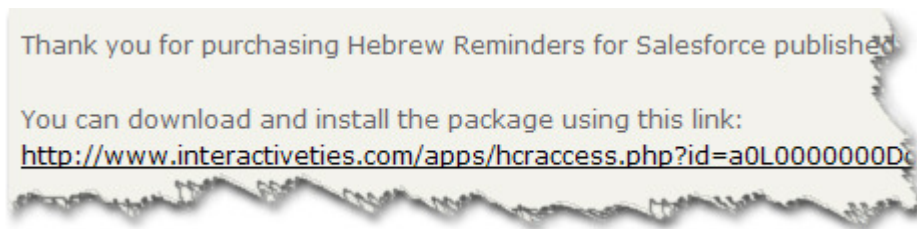
1. Install the Hebrew Reminders Package from the AppExchange

What: **Install the Hebrew Reminders package**

Why: Moves actual AppExchange package contents for Hebrew Reminders functionality into your Salesforce org.

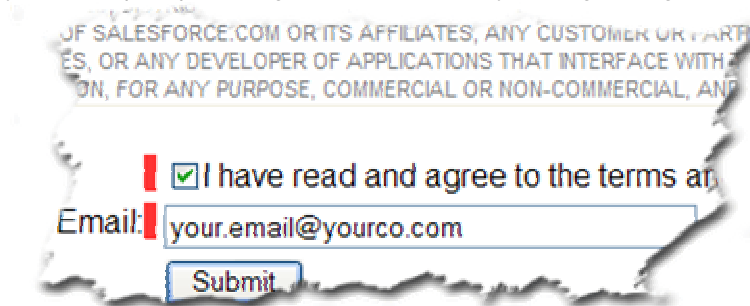
How: Click the Installation Link provided by Interactive Ties via Email (after purchase)

Upon purchasing Hebrew Reminders you will be sent an Email containing the information required to install the application. Within the Email will be a link from which you will be able to begin the installation process.



Agree to the Terms & Conditions on the Interactive Ties website

After clicking the link within the Email, you will be directed to the Interactive Ties website. The page will display the terms of the package installation and you will be prompted to agree with the terms by clicking the “agree” checkbox and providing your Salesforce login Id (Email).



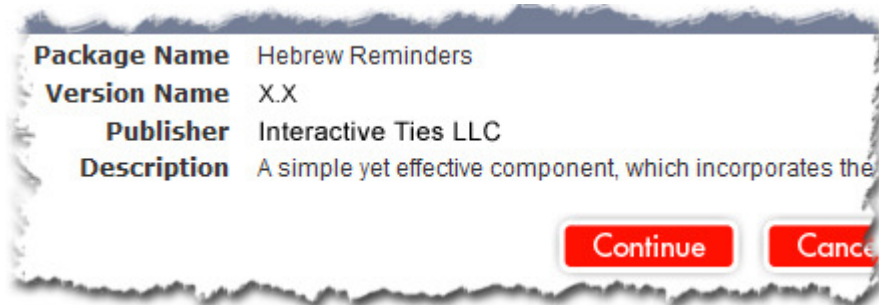
Sign into your Salesforce org

After you agree to the terms you will be directed to the Salesforce login page where you will have to login to your Salesforce instance.

Install Hebrew Reminders (continued...)

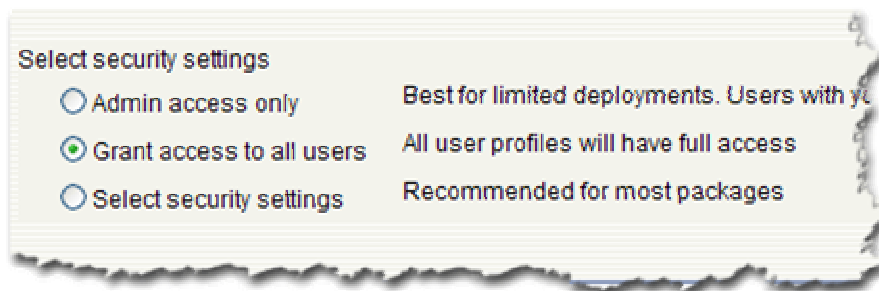
Review the package installation details

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 Hebrew Reminders. Since the application uses the AJAX toolkit and a combination of S-Controls, you should simply click **Next**.
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 Hebrew Reminders 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. Click the **Install** button.

Upon successful installation of the package you will be prompted to either "Deploy Now" or "Deploy Later." Since there are additional setup steps required to get the correct functionality of the application it is suggested that you simply click the **Deploy Later** button.

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

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

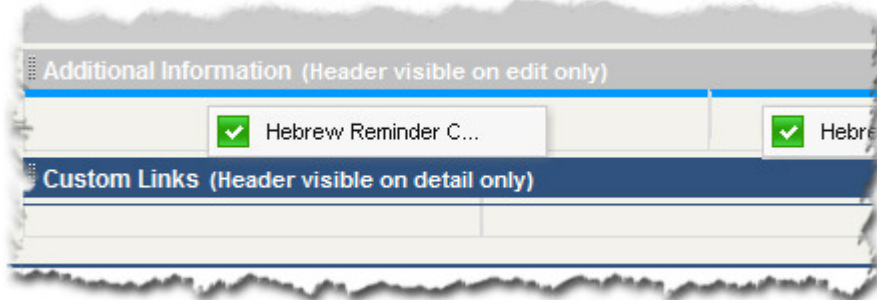
Why: Allows for personal settings related to Hebrew Reminders to be updated from the User record.

How: Add the “Hebrew Reminders Criteria” & “Hebrew Reminder Date 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 “Hebrew Reminders 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 “Hebrew Reminders Date 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. Override the “View”, “Edit” and “New” Buttons on the Hebrew Reminder Object

What: Override standard button functionality on the Hebrew Reminder custom object

Why: Allows for proper functionality of the Hebrew Reminders application.

How: Update the standard buttons for the Hebrew Reminders object
 The Hebrew Reminders custom object can be modified by going to: **Setup > Create > Objects**

From this screen you will see all of the custom objects for your organization. Click the label reading **Hebrew Reminder**. Once on the Hebrew Reminder custom object screen you will need to scroll down to the section of the page reading “Standard Buttons And Links.”

Click the **Override** link next to the “View” label. On the resulting screen click the radio button for **Custom S-Control**.

Select **override_view [ities_hcr__override_view]** from the “Content Name” picklist. Click the **Save** button.

Click the **Override** link next to the “Edit” label. On the resulting screen click the radio button for **Custom S-Control**.

Select **override_edit [ities_hcr__override_edit]** from the “Content Name” picklist. Click the **Save** button.

Click the **Override** link next to the “New” label. On the resulting screen click the radio button for **Custom S-Control**.

Select **override_new [ities_hcr__override_new]** from the “Content Name” picklist. Click the **Save** button.

Override	List	List	<input type="checkbox"/>	
Override Reset View		View	<input checked="" type="checkbox"/>	override view [ities hcr override view]
Override Reset Edit		Edit	<input checked="" type="checkbox"/>	override edit [ities hcr override edit]
Override	Delete	Delete	<input type="checkbox"/>	
Override	Clone	Clone	<input type="checkbox"/>	
Override Reset New		New	<input checked="" type="checkbox"/>	override new [ities hcr override new]
Override	Accept	Accept	<input type="checkbox"/>	

Note: Failure to override the standard buttons as described above will prevent the Hebrew Reminders application from working properly.

4. Deploy the Hebrew Reminders Package

What: **Deploy the Hebrew Reminders Package**

Why: Required for making the Hebrew Reminders application available to your Salesforce users.

How: [Deploy the Package](#)
The package can only be deployed from the package detail page. Access this page by going to: **Setup > View Installed Packages**

The page will display all the installed packages for your organization - click the **Hebrew Reminders** link.

Click the **Deploy** button.



Another page will display the package components – click the **Deploy** button.

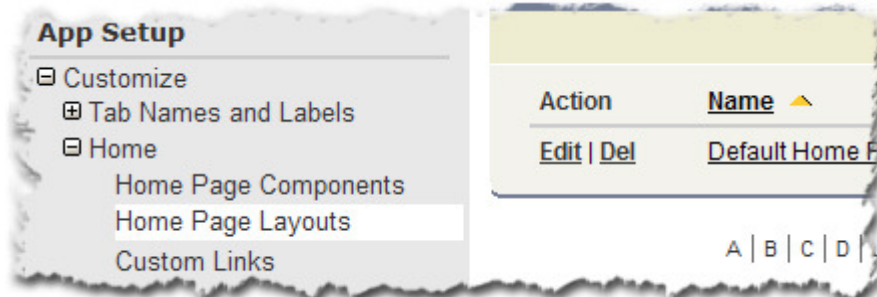
5. Add the Hebrew Reminders Component to Your Home Page Layout(s)

What: Update Home Page Layouts with the Hebrew Reminders Component

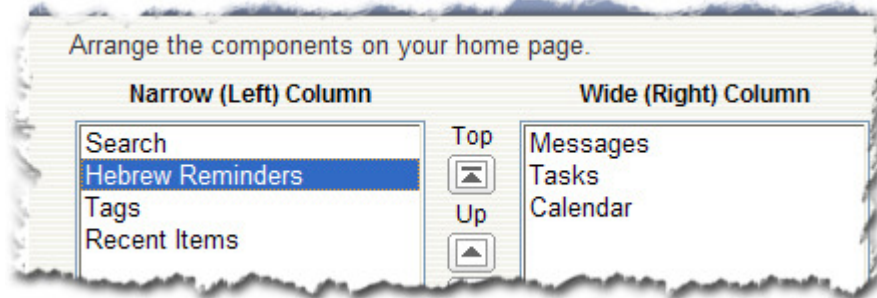
Why: Required for viewing the reminders.

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 **Hebrew Reminders** under the section of the page reading "Select Narrow Components to Show." Click **Next**. Use the selectors to move the Hebrew Reminders 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.

6. Add the Hebrew Reminders Related List to Your Contact Page Layout(s)

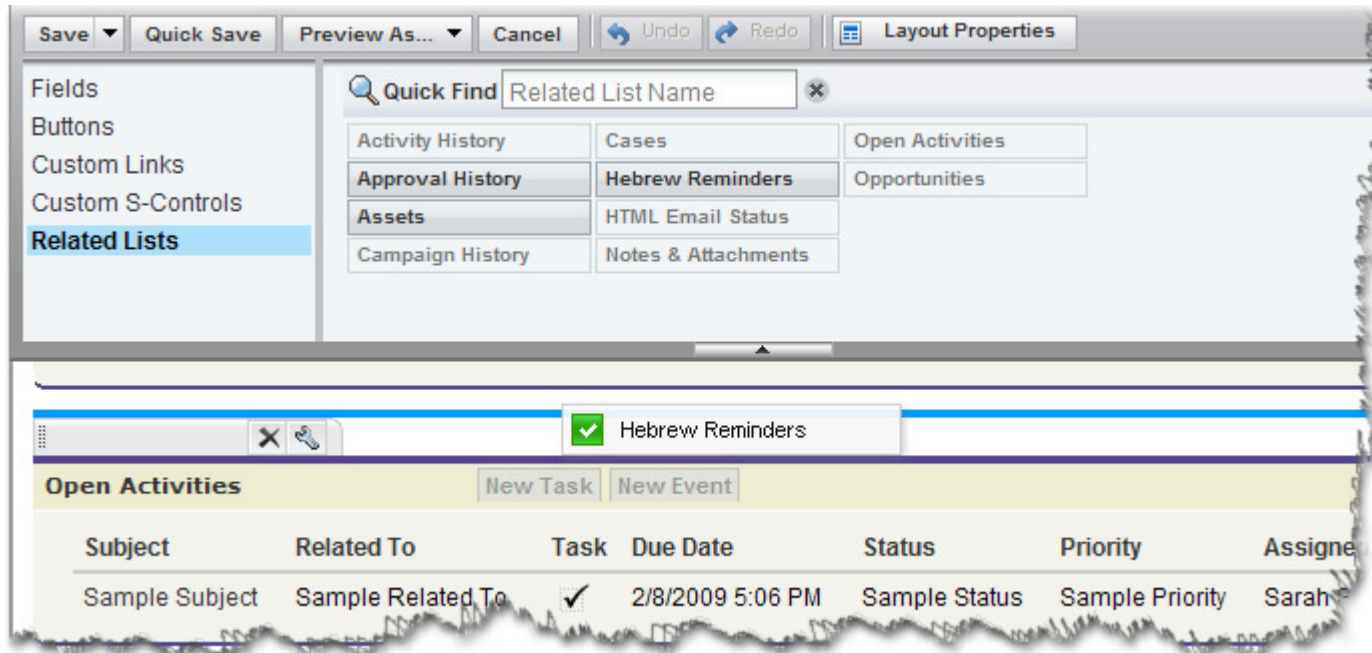
What: Update Contact Page Layouts with the Hebrew Reminders Related List

Why: Required for viewing the reminders related list.

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

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

Click the **Related Lists** link located on the left-hand side of the page editor at the top of the screen. Drag and drop the **Hebrew Reminders** related list to the desired area of the page.



Click the wrench icon in the Hebrew Reminder related list.



Add the Hebrew Reminders Related List to Your Contact Page Layout(s) (continued...)

In the resulting window move the **Reminder**, **Hebrew Date**, **Gregorian Date**, **Use Gregorian Date?**, and **Created By** fields from the "Available Fields" multi-select picklist section to the "Selected Fields" multi-select picklist section.

Remove any other fields (not listed above) from the "Selected Fields" multi-select picklist section.

Select **Gregorian Date** from the "Sort By" picklist.

Keep the "Ascending" option selected.

Columns

Select fields to display on the related list. You can also re-order the selected fields.

Available Fields

- Created By Alias
- Created Date
- Date
- Day - Hebrew
- Gregorian Day
- Gregorian Month
- Hebrew Month

Selected Fields

- Reminder
- Gregorian Date
- Hebrew Date
- Use Gregorian Date?
- Created By

Sort By:

Ascending

Descending

Click the **OK** button, which will close the window.

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

You will be prompted to overwrite the related list customizations by your users – select **Yes**.

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

What: **Add visibility to the Hebrew Reminders 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.