

Customization & Enhancement Guide

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Using This Document

These simple customizations are required for full functionality of the Links Tab.

Customizations & Enhancements

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1. Install the Links Tab Package from the AppExchange

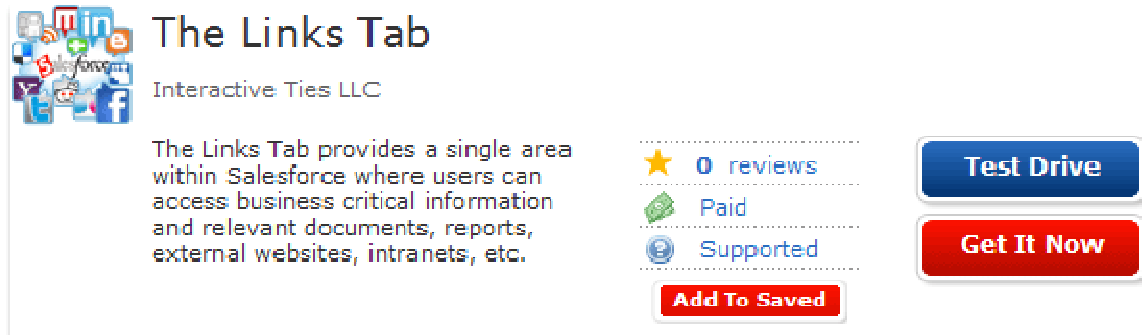
What: **Install the Links Tab package**

Why: Moves actual AppExchange package contents for the Links Tab functionality into your Salesforce org.

How: Click the "Get It Now" Button from the AppExchange Listing

Navigate to the AppExchange Listing for The Links Tab (<https://sites.secure.force.com/appexchange/listingDetail?listingId=a0N300000016qbAEAQ>).

Click the button reading "Get It Now."

A screenshot of the AppExchange listing for "The Links Tab" package. The listing includes the package icon, the name "The Links Tab", the developer "Interactive Ties LLC", a description, a star rating of 0 reviews, a "Paid" status, a "Supported" status, and buttons for "Test Drive", "Get It Now", and "Add To Saved".

The Links Tab
Interactive Ties LLC

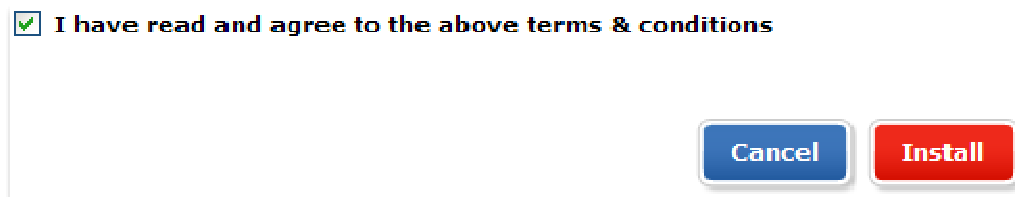
The Links Tab provides a single area within Salesforce where users can access business critical information and relevant documents, reports, external websites, intranets, etc.

★ 0 reviews
Paid
Supported

Test Drive
Get It Now
Add To Saved

Agree to the Terms & Conditions

After clicking the "Get It Now" button, you will be directed to a page displaying the terms of the package installation and you will be prompted to agree with the terms by clicking the "agree" checkbox. Then click the "Install" button.

A screenshot of the terms and conditions agreement screen. It features a checked checkbox next to the text "I have read and agree to the above terms & conditions" and two buttons: "Cancel" and "Install".

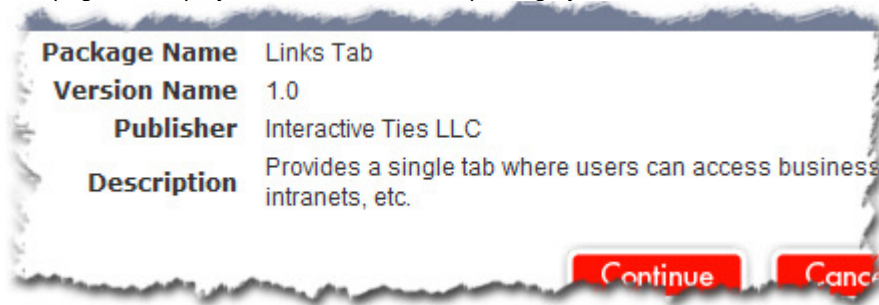
I have read and agree to the above terms & conditions

Cancel **Install**

Install The Links Tab (continued...)

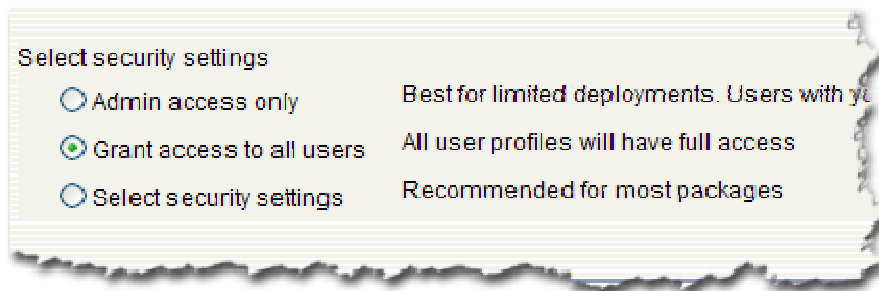
Review the package installation details

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 Links Tab. 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. 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 no major setup steps required to get the correct functionality of the application it is suggested that you simply click the **Deploy Now** button. You will be prompted to confirm this request by clicking another **Deploy** button on the resulting page.

2. Add the "Manage Links Tab" Field to Your User Page Layout(s)

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

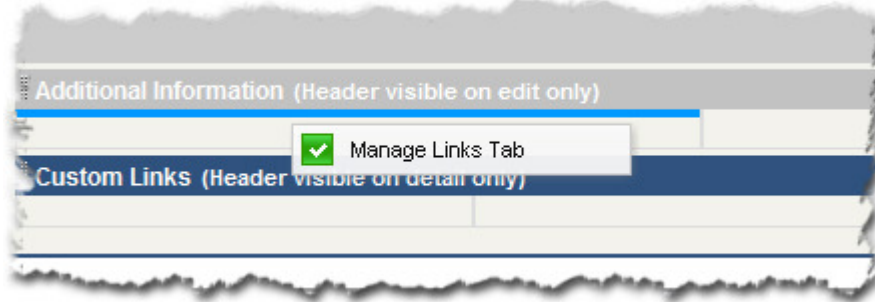
Why: Allows for personal settings related to the Links Tab to be updated from the User record.

How: Add the "Manage Links Tab" field 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 "Manage Links Tab" 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.

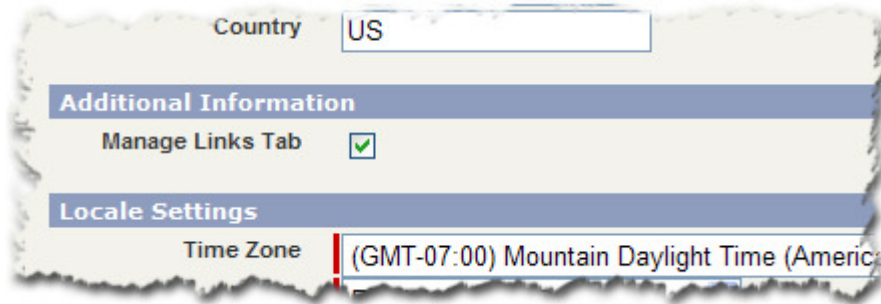
Note: If your organization uses multiple page layouts for User records then you may have to repeat the above steps for each page layout.

3. Update Users that are Permitted to be Administrators of the Links Tab

- What: **Authorize specific Users to maintain the Links Tab**
- Why: Grants permission for certain Users to create, edit & delete categories and links within the Links Tab.
- How: Update the "Manage Links Tab" permission on the user record of select Users
Each User record can be modified by going to: **Setup > Manage Users > Users**

From this screen you will see all of the users in your organization. Click the **Edit** link located on the left-hand side of the users' name.

Scroll down to the portion of the page with the section reading "Additional Information." Check the box next to the field reading **Manage Links Tab**.



Click the **Save** button.

Note: The ability to manage the Links Tab should be limited to only a select few Users. This will keep information consistent and prevent any confusion when the application is rolled out.