

**Customization & Enhancement Guide**

**Using This Document**

These simple customizations are required for full functionality of the Home Tab Messages application.

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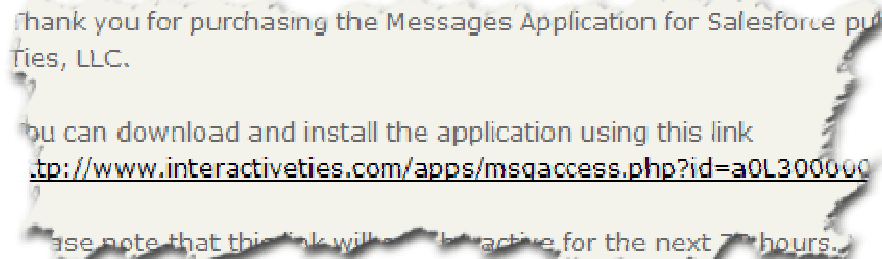
## 1. Install Home Tab Messages

What: **Install the Home Tab Messages package after purchase from Interactive Ties LLC**

Why: Moves actual AppExchange package contents for the Home Tab Messages application to your Salesforce org.

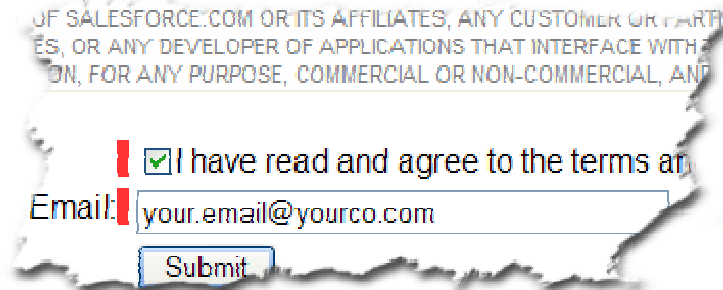
How: Click the Installation Link provided by Interactive Ties via Email (after purchase)

Upon purchasing Home Tab Messages 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).



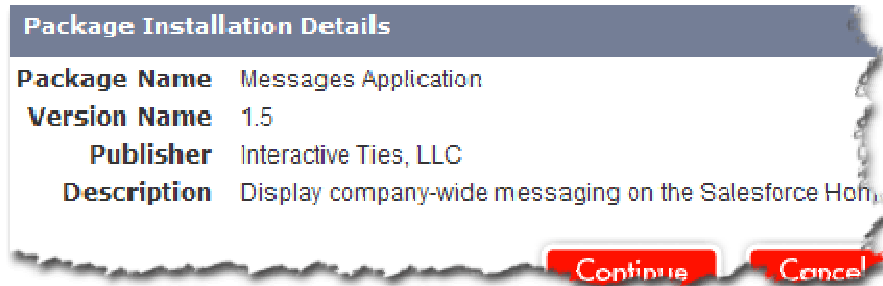
Sign into your Salesforce org

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 Home Tab Messages (continued...)

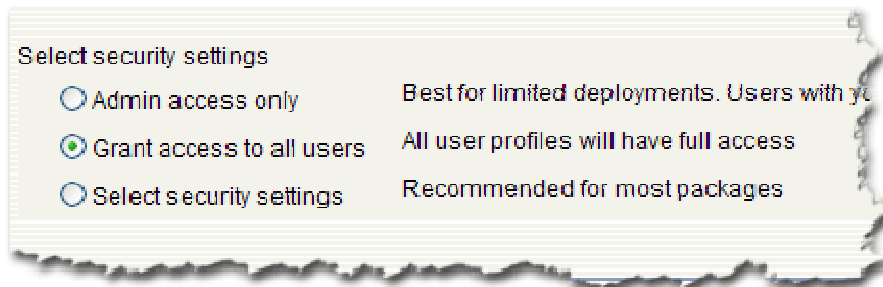
Review the package installation details

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 Home Tab Messages. Since the app 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 Home Tab Messages 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.

## 2. Add the "Manage Home Page Messages" Field to Your User Page Layout(s)

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

Why: Allows for granting and denying admin access to the Home Tab Messages screens from the User record.

How: Add the "Manage Home Page Messages" field to the 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 Home Tab Messages" custom field from the right-hand box reading **User Fields**.

Drag the field selection to the Additional Information page layout section on the left-hand side of the screen.



Click the **Save** button at the top or bottom 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.

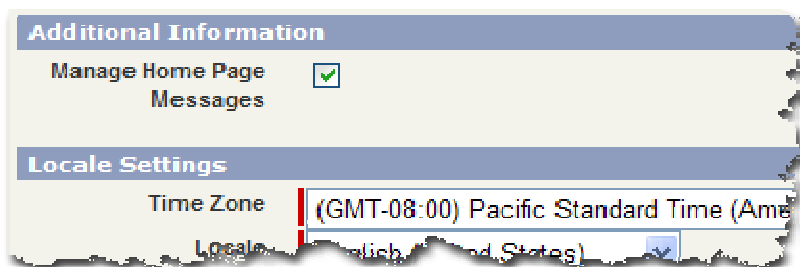
### 3. Update Users that are Authorized to Maintain Home Tab Messages

What: **Authorize specific Users to maintain Home Tab Messages**

Why: Grants permission for certain Users to create, edit, & delete messages within the application.

How: Update the "Manage Home Page Messages" permission on for select users  
Each User record can be modified by going to: **Setup > Manage User > Users**

From this screen you can edit the "Manage Home Page Messages" value for each user in your organization.



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

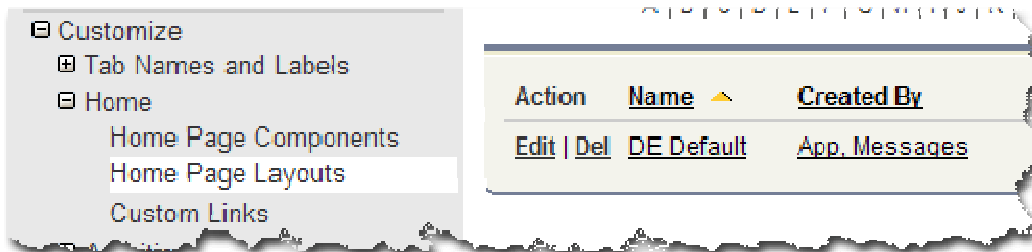
4. Add the Messages Component to Your Home Page Layout(s)

What: **Update Home Page Layouts with the Messages Component**

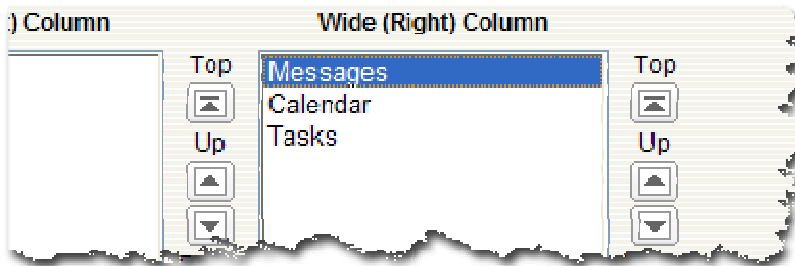
Why: Required for viewing the messaging which gets added to the application.

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 **Messages** under the section of the page reading "Select Wide Components to Show." Click **Next**. Use the selectors to move the Messages 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.

5. (OPTIONAL) Create a Workflow Rule and Field Update to Perform Deactivation of Expired Messaging

What: **Add Workflow Rule with a Field Update**

Why: Optional steps to perform actual deactivation of message where expiration date has been set and that date is now in the past.

How: Create a Workflow Rule  
Workflow can be created by going to: **Setup > Create > Workflow & Approvals > Workflow Rules**

The page will display all the workflow rules for your organization. Click the **New Rule** button towards the middle of the page.

The resulting page will allow you to select the object, which will trigger the workflow. Choose **Message** from the picklist and click the **Next** button.

Next you will configure the workflow rule by providing:

1. **Rule Name** = "Deactivate Message"
2. **Description** = "Updates the Active flag on a message if the Expiration Date field is populated with a date"
3. **Evaluation** = "When a record is created, or when a record is edited and did not previously meet the rule criteria"
4. **Run this rule if the following** = "criteria are met"
5. **Criteria** = "Active equals True"

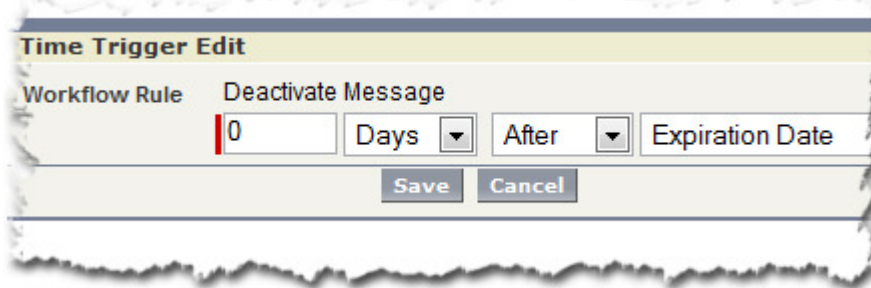
Edit Rule		
Object	Message	
Rule Name	Deactivate Message	
Description	Updates the Active flag on a message if the Expiration Date field is populated with a date.	
Evaluation Criteria		
Evaluate rule	How do I choose?	
	<input checked="" type="radio"/> When a record is created, or when a record is edited and did not previously meet the rule criteria <input type="radio"/> Only when a record is created <input type="radio"/> Every time a record is created or edited	
Rule Criteria		
Run this rule if the following	criteria are met	
Field	Operator	Value
Active	equals	True
	None--	

(OPTIONAL) Create a Workflow Rule and Field Update to Perform Deactivation of Expired Messaging (continued...)

Click the **Save & Next** button.

Click the **Add Time Trigger** button located in the middle of the page within the section reading **Time-Dependent Workflow Actions**.

Select **0 Days After Expiration Date** from the options provided and click the **Save** button.



The screenshot shows a 'Time Trigger Edit' dialog box. It has a title bar 'Time Trigger Edit'. Below the title bar, there is a label 'Workflow Rule' followed by the text 'Deactivate Message'. Below that, there is a text input field containing the number '0', followed by a dropdown menu with 'Days' selected, another dropdown menu with 'After' selected, and the text 'Expiration Date'. At the bottom of the dialog, there are two buttons: 'Save' and 'Cancel'.

The resulting page will display a selection box reading **Add Workflow Action**. Choose **New Field Update** from the options.

Next you will configure the field update by providing:

1. **Name** = "Deactivate Message"
2. **Description** = "Unchecks the Active flag on a message if the Expiration Date field is populated with a date"
3. **Field to Update** = "Active"
4. **Checkbox Options** = "False"

(OPTIONAL) Create a Workflow Rule and Field Update to Perform Deactivation of Expired Messaging (continued...)

**Field Update Edit** Save Save & New Cancel

**Identification**

Name Deactivate Message

Description Unchecks the Active flag on a message if the Expiration Date field with a date.

Object Message

Field to Update Active

Field Data Type Checkbox

**Specify New Field Value**

**Checkbox Options**

True

False

Save Save & New Cancel

Click the **Save** button.

Click the **Done** button.

Click the **Activate** button.