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AGENDA

PSC Record Page Header/Custom Highlights Panel

01 Record Page Header

01.

WHY

- Enhanced User Experience.
- Customization Needs.
- Improved Data Presentation
- Consistency and Branding

02.

WHAT

- Header Section
- Field Display
- Configurable Options
- Customization Options

03.

HOW

- Salesforce Platform
- Lightning Web Component
- **Dynamic Components** for LWC.
- Custom Javascript
- App Builder Custom Managed Component

A background image showing a woman with long brown hair smiling and hugging a young girl with long brown hair. The girl is wearing a red and white plaid shirt. The image is semi-transparent, allowing the text to be overlaid.

Record Page Header

a custom highlights panel

WHY ?



RECORD PAGE HEADER

Challenges

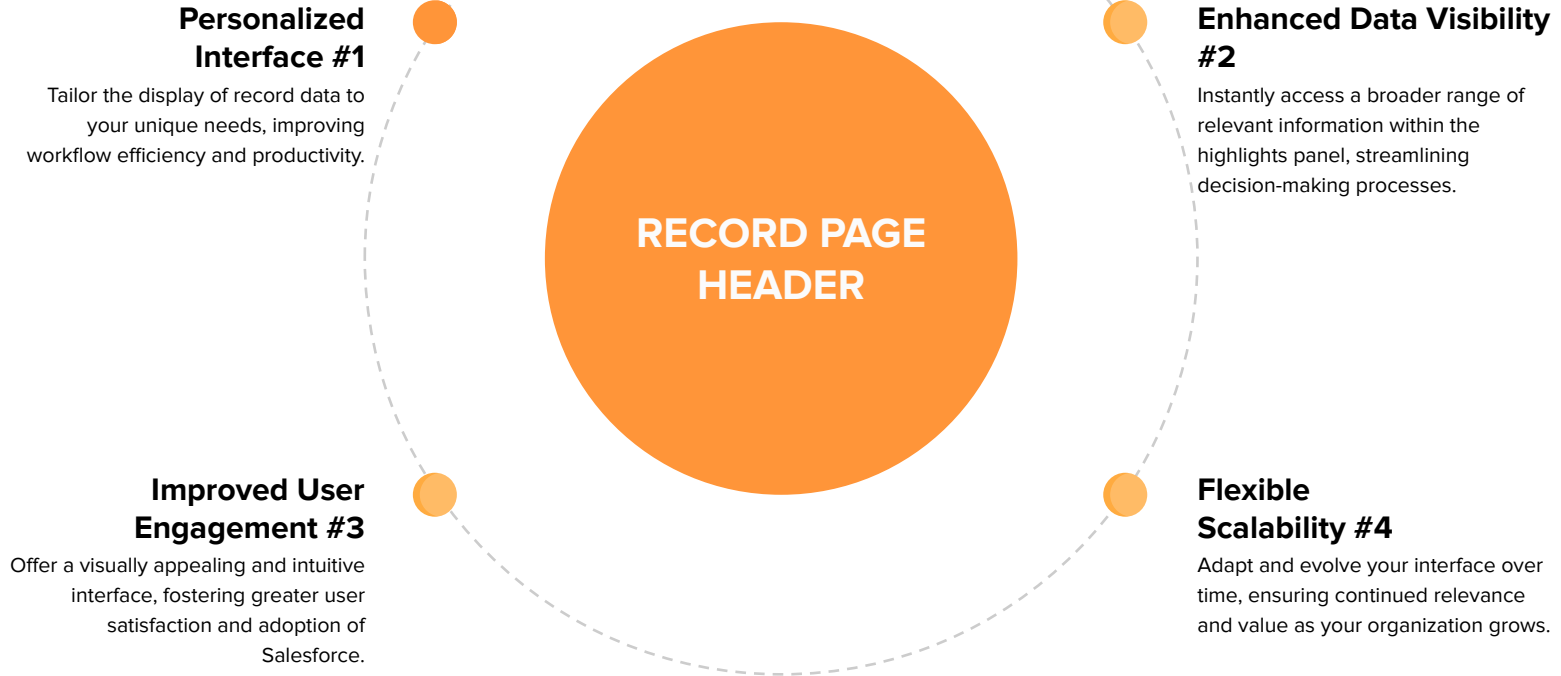
- ❑ **Enhanced User Experience:** The record page header with custom highlights panel aims to enhance user experience within the Salesforce environment by providing a more visually appealing and intuitive interface for accessing and interacting with record data.
- ❑ **Customization Needs:** Standard Salesforce highlights panels may not fully meet the customization requirements of all users or organizations. Therefore, there's a need for a custom solution that offers greater flexibility in terms of layout, design, and functionality.
- ❑ **Improved Data Presentation:** By allowing users to display more fields, choose object icons and labels, and customize the background color, the record page header facilitates better presentation of critical data, leading to improved decision-making and productivity.
- ❑ **Consistency and Branding:** Ensuring that the custom highlights panel maintains the same look and feel as the standard highlights panel helps maintain consistency in the user interface and reinforces branding efforts within the Salesforce platform.



- ❑ **Header Section:** A header section that replicates the appearance and functionality of the standard Salesforce highlights panel, including buttons and scroll collapse feature.
- ❑ **Add. Field Display:** The ability to display additional fields beyond the default limit imposed by standard highlights panels, allowing users to view more relevant information without navigating away from the record.
- ❑ **Configuration Options:** Options for users to customize the appearance of the highlights panel, such as choosing object icons, defining object labels for different record types, and selecting custom colors for the background.
- ❑ **Build your own buttons & highlight fields.**

WHAT ?

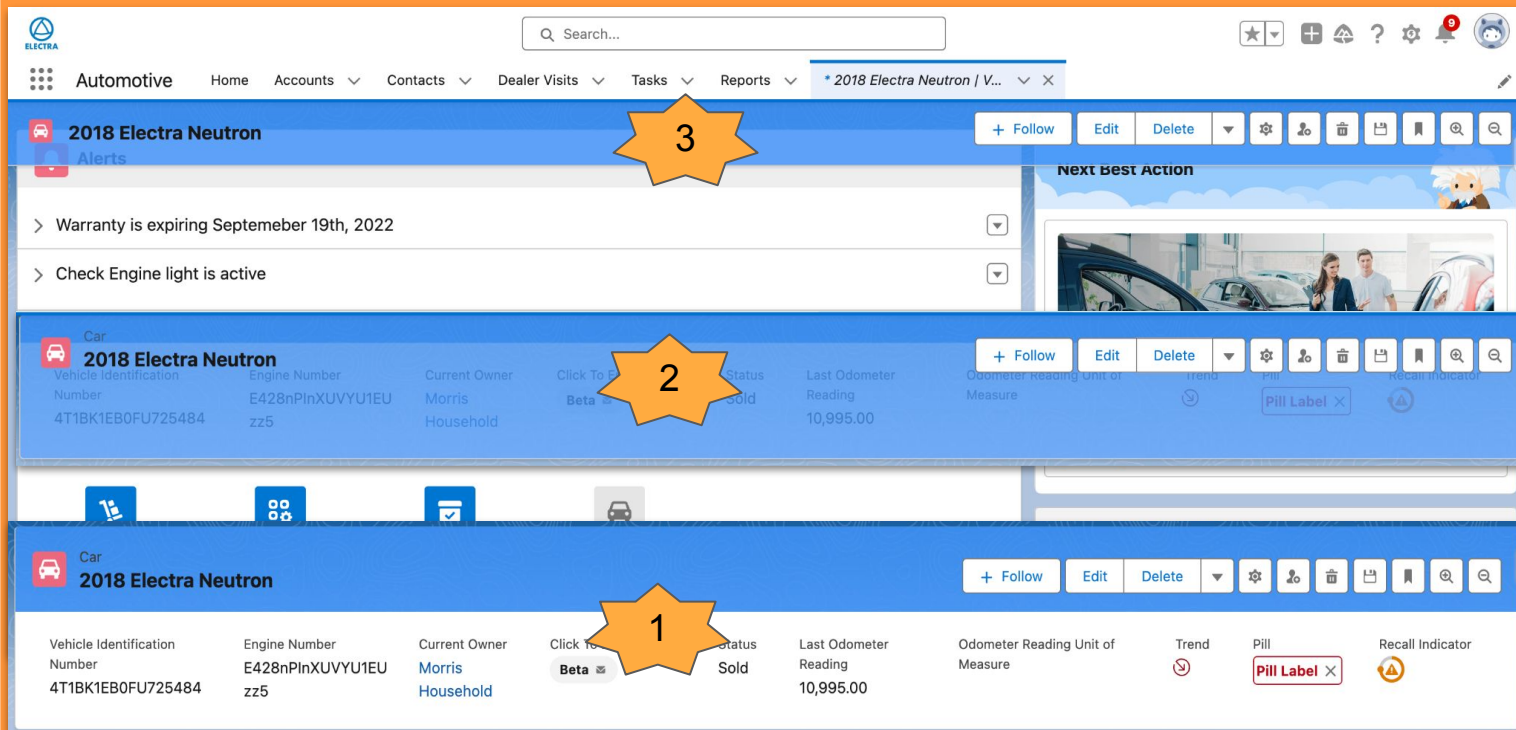
RECORD PAGE HEADER





Because every record
deserves its moment in
the spotlight!

A header section that replicates the appearance and functionality of the standard Salesforce highlights panel, including buttons and scroll collapse feature.



FEATURES



Add. Field Display

The ability to display additional fields beyond the default limit imposed by standard highlights panels, allowing users to view more relevant information without navigating away from the record.

The screenshot shows the Electra Automotive interface. At the top, there is a search bar and navigation tabs for Home, Accounts, Contacts, Dealer Visits, Tasks, and Reports. The current view is for a vehicle record titled "2023 Electra Beam". The record is displayed in a compact layout with 10 additional fields shown below the standard 6-field limit. The fields are:

Vehicle Name	Vehicle Identification Number	Engine Number	Current Owner	Status	Last Odometer Reading	Odometer Reading Unit of Measure	Active Warranty Count	Image	Warranty Indicator
2023 Electra Beam	WA1DKAFPX BA986067	E553hFFh7 SGGURLq9	Bagster Household	Sold	11,289.00		2		

Below the record, there is an "Alerts" section with two notifications:

- Warranty is expiring Septemeber 19th, 2022
- Check Engine light is active

To the right of the alerts, there is a "Next Best Action" section with a cartoon character and a video thumbnail.

For Desktop Version; Show up to 10 additional fields, surpassing the standard limit of 6 fields set by default in highlights from the assigned compact layout.

FEATURES



Configuration Options

Options for users to customize the appearance of the highlights panel, such as choosing object icons, defining object labels for different record types, and selecting custom colors for the background.

Page > PSC Record Page Header

- Icon Name**
custom:custom31
- Object Name (Custom)**
Car
- Header Background Color**
rgba(65, 148, 249, .85)
- Custom Follow Buttons Component**
c/statefulButtons
- No. Of Actions**
2
- Standard Actions**
Actions Powered By Platform Actions
- Custom Action Buttons Component**
c/additionalButtons
- Custom Details Component**

Record Page Details:

- Vehicle Name:** 2023 Electra Beam
- Vehicle Identification Number:** WA1DKAFPX BA986067
- Engine Number:** E553HFFHH 7SGGURLqj 9
- Current Owner:** Bagster Household
- Status:** Sold
- Last Odometer Reading:** 11,294.00
- Odometer Reading Unit of Measure:**
- Active Warranty Count:** 2
- Image:** [Car Image]
- Warranty Indicator:** ?

Alerts:

- Warranty is expiring Septemeber 19th, 2022
- Check Engine light is active

Milestones:

- Order Received
- Manufactured
- Delivered
- Sold

Next Best Action:

- Renew Vehicle Warranty**
Use this action to send a link in customer's preferred channel to schedule a test drive
[Renew]

ASSET > 2023 ELECTRA BEAM

Asset Hierarchy

ASSET	STATUS	PRODUCT SKU
2023 Electra Beam	Current	Registered

Activity

- Vehicle Paid Off**
3:00pm | Fri, Mar 25, 2022
- 60,000 Mile Service**
3:00pm | Fri, Mar 25, 2022

Details

General Information

Vehicle Name	2023 Electra Beam	Status	Sold
Current Owner	Bagster Household	Image	[Car Image]

FEATURES

Build your own buttons & highlight fields.

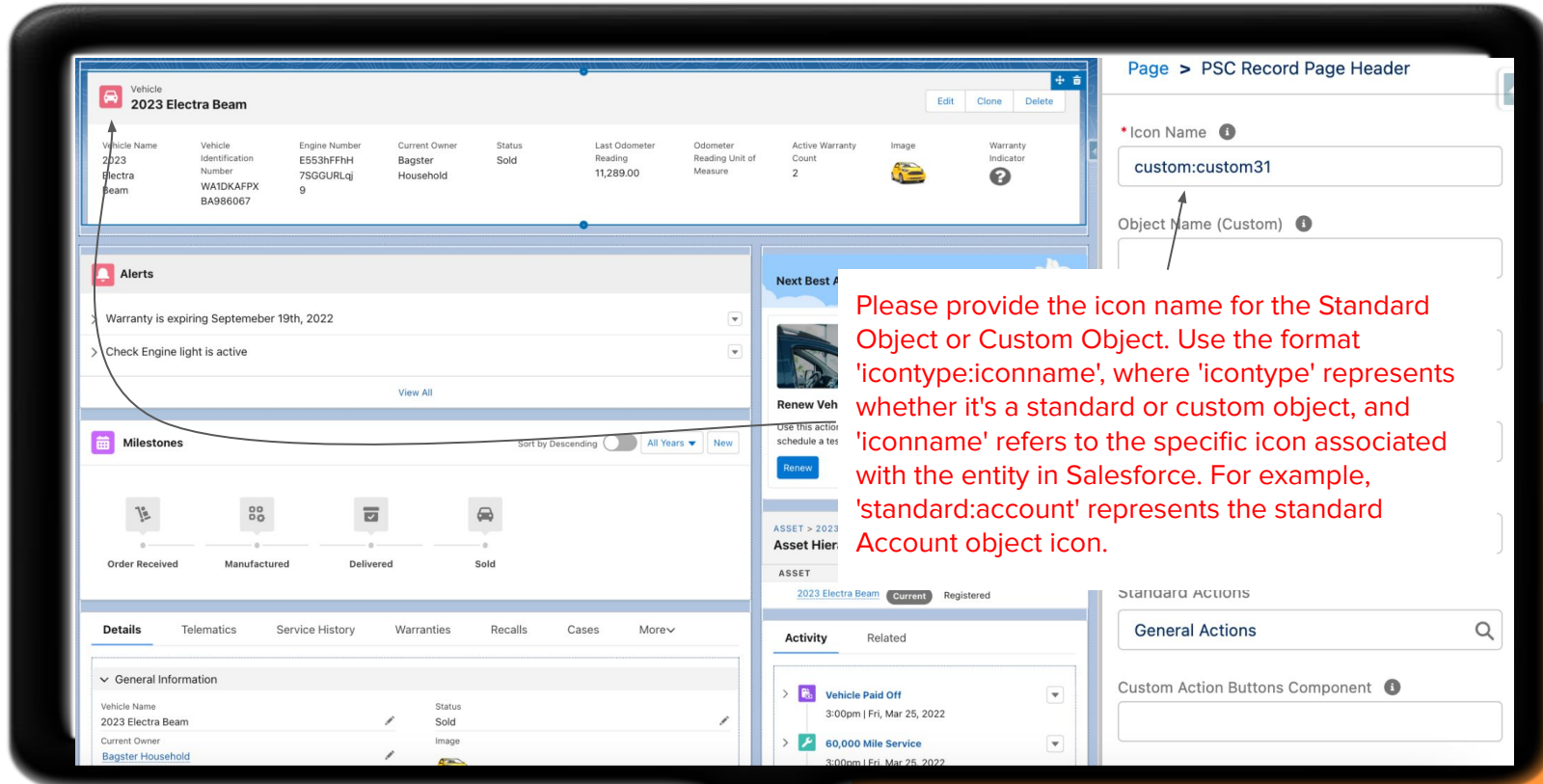
BYOB + BYOHF

Users can create custom buttons with desired functionalities and define which fields are highlighted or emphasized for quick access or reference.



The screenshot displays the ELECTRA Automotive web application. At the top, there's a navigation bar with a search bar and various icons. Below it, a breadcrumb trail shows the path: Automotive > Home > Accounts > Contacts > Dealer Visits > Tasks > Reports > 2023 Electra Beam. The main content area is titled 'Car 2023 Electra Beam'. A red box highlights the top action bar, which includes a '+ Follow' button, 'Edit', 'Delete', and a dropdown menu. Another red box highlights a table of vehicle details. Below this, there's an 'Alerts' section with two items: 'Warranty is expiring Septemeber 19th, 2022' and 'Check Engine light is active'. A 'Milestones' section is also visible, with a 'Sort by Descending' toggle and buttons for 'All Years' and 'New'. On the right side, a 'Next Best Action' section titled 'Renew Vehicle Warranty' includes a description and a 'Renew' button.

Vehicle Identification Number	Engine Number	Current Owner	Click To Email	Status	Last Odometer Reading	Odometer Reading Unit of Measure	Trend	Pill	Recall Indicator
WA1DKAFPXBA986067	E553hFFhH7SGGUR Lqj9	Bagster Household	Beta	Sold	11,289.00			Pill Label X	



Vehicle
2023 Electra Beam

Vehicle Name	Vehicle Identification Number	Engine Number	Current Owner	Status	Last Odometer Reading	Odometer Reading Unit of Measure	Active Warranty Count	Image	Warranty Indicator
2023 Electra Beam	WA1DKAFX BA986067	E553HFFHH 7SGGURLqj 9	Bagster Household	Sold	11,289.00		2		

Alerts

- Warranty is expiring Septemeber 19th, 2022
- Check Engine light is active

Milestones

Sort by Descending ☐ All Years

Order Received ☐ Manufactured ☐ Delivered ☐ Sold ☐

Details | Telematics | Service History | Warranties | Recalls | Cases | More

General Information

Vehicle Name	2023 Electra Beam	Status	Sold
Current Owner	Bagster Household	Image	

Next Best Action

Renew Veh

Use this action to schedule a test

ASSET > 2023 Asset Hier

ASSET

2023 Electra Beam ☒ Current ☐ Registered

Activity | Related

- Vehicle Paid Off**
3:00pm | Fri, Mar 25, 2022
- 60,000 Mile Service**
3:00pm | Fri, Mar 25, 2022

Page > PSC Record Page Header

***Icon Name**

custom:custom31

Object Name (Custom)

Please provide the icon name for the Standard Object or Custom Object. Use the format 'icontype:iconname', where 'icontype' represents whether it's a standard or custom object, and 'iconname' refers to the specific icon associated with the entity in Salesforce. For example, 'standard:account' represents the standard Account object icon.

Standard ACTIONS

General Actions

Custom Action Buttons Component


Car
2023 Electra Beam

[Edit](#)
[Clone](#)
[Delete](#)

Vehicle Name 2023 Electra Beam	Vehicle Identification Number WA1DKAFPX BA986067	Engine Number E553HFFHH 7SGGURLqj 9	Current Owner Bagster Household	Status Sold	Last Odometer Reading 11,289.00	Odometer Reading Unit of Measure	Active Warranty Count 2	Image 	Warranty Indicator 
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Alerts

> Warranty is expiring Septemeber 19th, 2022

> Check Engine light is active

View All


Milestones

Sort by descending

All Years

New

Order Received

Manufactured

Delivered

Sold

Details

Telematics

Service History

Warranties

Recalls

Cases

More

General Information

Vehicle Name

2023 Electra Beam

Status

Sold

Current Owner

Bagster Household

Image



Page > PSC Record Page Header

Icon Name

custom:custom31

Object Name (Custom)

Car

Header Background Color

rgba(255,179,57,1)

Custom Follow Buttons Component

Next Best Action



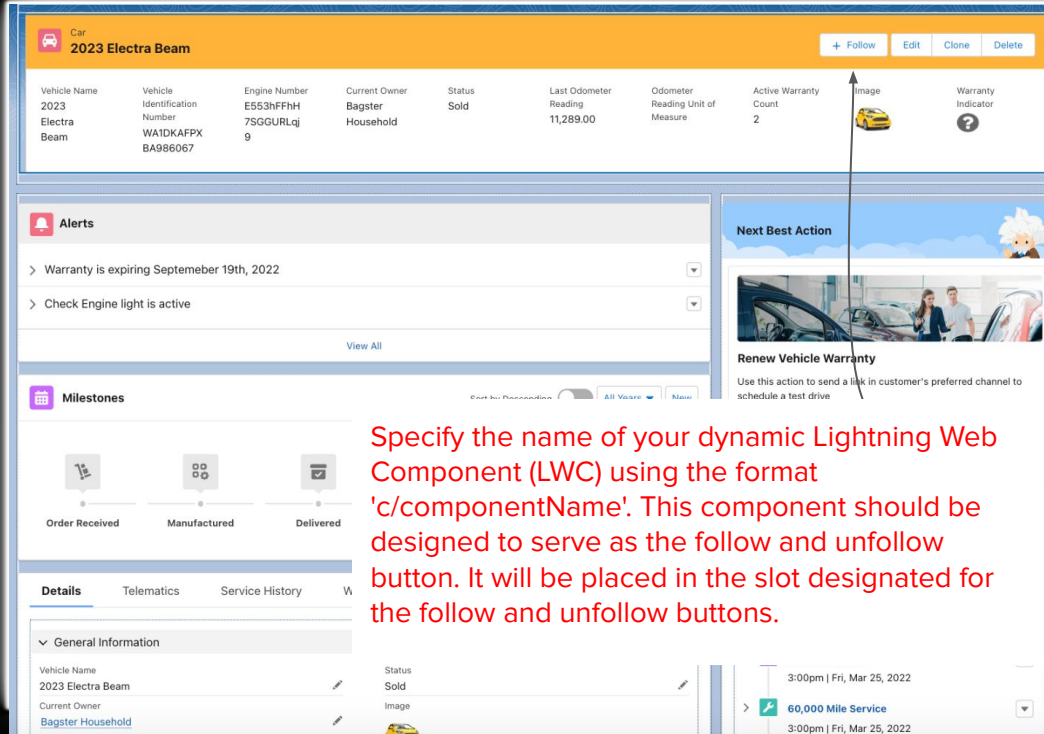
Renew Vehicle Warranty
 Use this action to send a link in customer's preferred channel to schedule a test drive

Act

3:00pm | Fri, Mar 25, 2022


60,000 Mile Service
 3:00pm | Fri, Mar 25, 2022

Brand the highlights panel or record page header with the background color in rgb, rgba or hex format. Color coding...helps.



Car
2023 Electra Beam

+ Follow Edit Clone Delete

Vehicle Name	Vehicle Identification Number	Engine Number	Current Owner	Status	Last Odometer Reading	Odometer Reading Unit of Measure	Active Warranty Count	Image	Warranty Indicator
2023 Electra Beam	WATDKAFPX BA986067	E553hFFHH 75GGURLqj 9	Bagster Household	Sold	11,289.00		2		

Alerts

- Warranty is expiring Septemeber 19th, 2022
- Check Engine light is active

Milestones

Order Received Manufactured Delivered

Details Telematics Service History

General Information

Vehicle Name
2023 Electra Beam

Current Owner
Bagster Household

Status
Sold

Image


3:00pm | Fri, Mar 25, 2022

60,000 Mile Service
3:00pm | Fri, Mar 25, 2022

Specify the name of your dynamic Lightning Web Component (LWC) using the format 'c/componentName'. This component should be designed to serve as the follow and unfollow button. It will be placed in the slot designated for the follow and unfollow buttons.

Page > PSC Record Page Header

* Icon Name ⓘ

custom:custom31

Object Name (Custom) ⓘ

Car

Header Background Color ⓘ

rgba(255,179,57,1)

Custom Follow Buttons Component ⓘ

c/statefulButtons

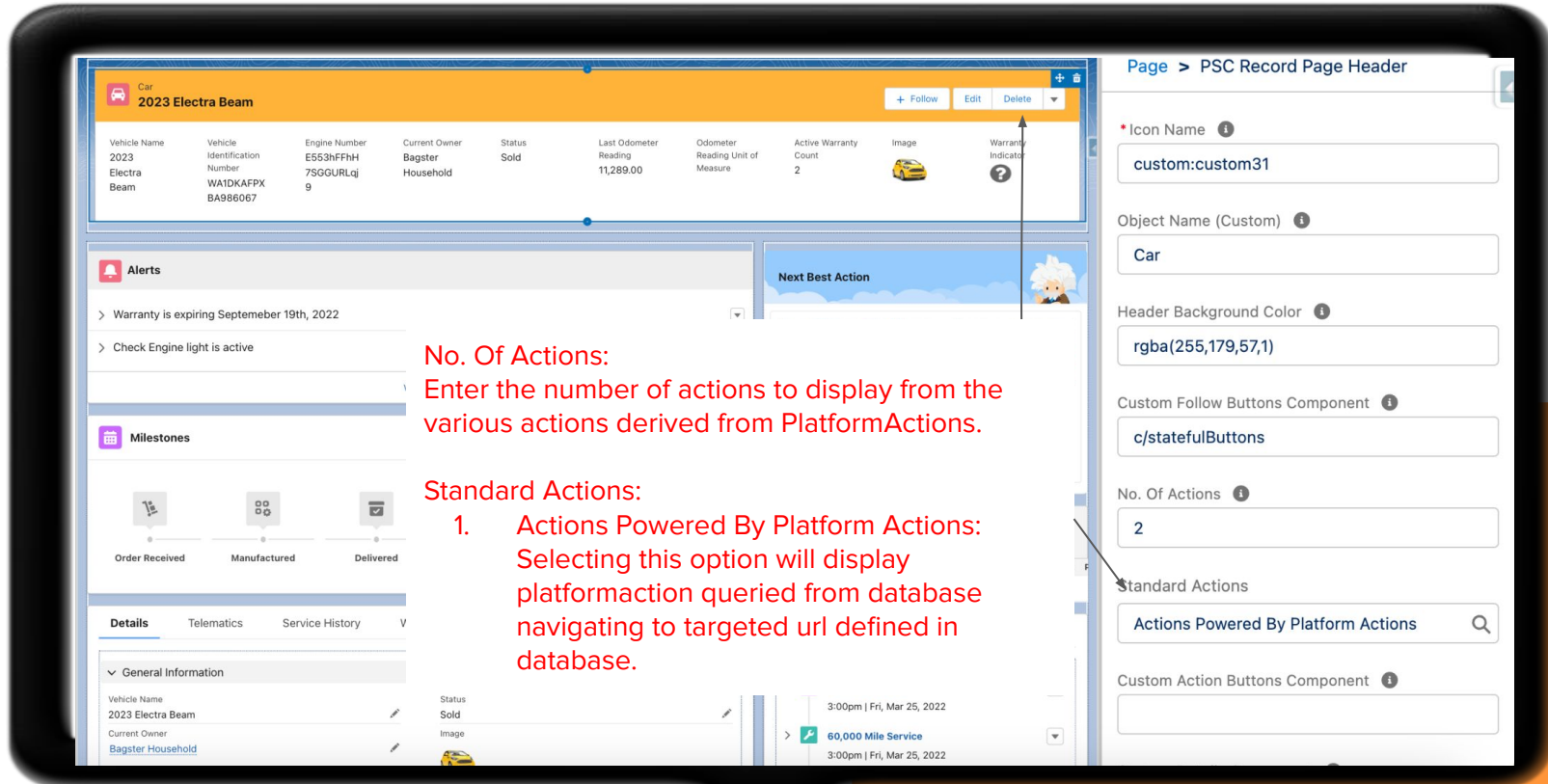
No. Of Actions ⓘ

2

Standard Actions

General Actions

Custom Action Buttons Component ⓘ



Car
2023 Electra Beam

+ Follow Edit Delete

Vehicle Name	Vehicle Identification Number	Engine Number	Current Owner	Status	Last Odometer Reading	Odometer Reading Unit of Measure	Active Warranty Count	Image	Warranty Indicator
2023 Electra Beam	WATDKAFPX BA986067	E553hFFHH 7SGGURLqg	Bagster Household	Sold	11,289.00		2		

Alerts

- Warranty is expiring Septemeber 19th, 2022
- Check Engine light is active

Milestones

Order Received Manufactured Delivered

Details Telematics Service History V

General Information

Vehicle Name: 2023 Electra Beam
Current Owner: Bagster Household
Status: Sold
Image: 

3:00pm | Fri, Mar 25, 2022

60,000 Mile Service
3:00pm | Fri, Mar 25, 2022

Page > PSC Record Page Header

*Icon Name ⓘ
custom:custom31

Object Name (Custom) ⓘ
Car

Header Background Color ⓘ
rgba(255,179,57,1)

Custom Follow Buttons Component ⓘ
c/statefulButtons

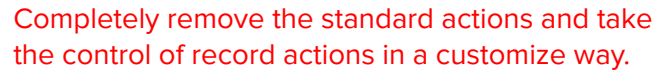
No. Of Actions ⓘ
2

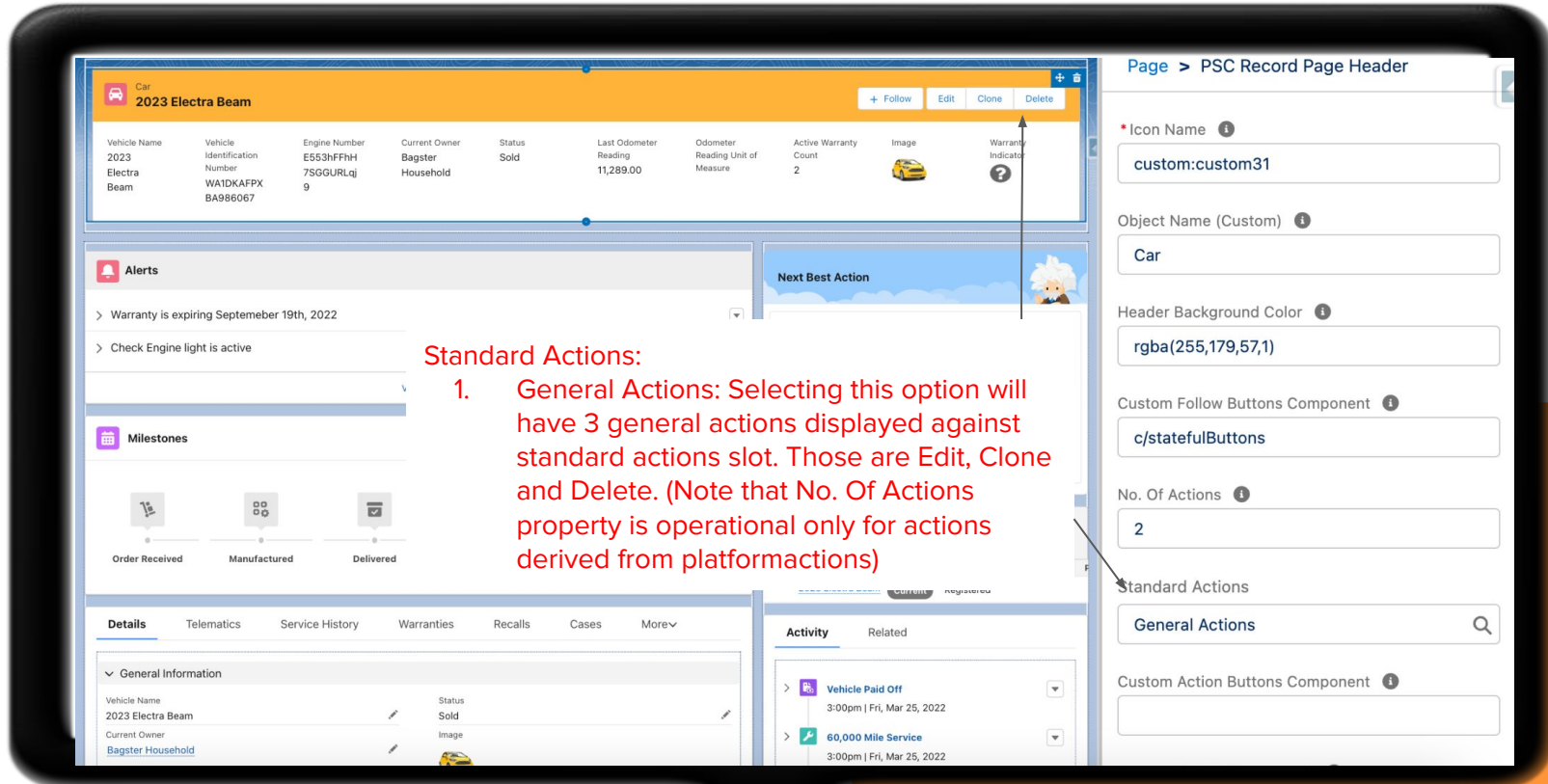
Standard Actions
Actions Powered By Platform Actions

Custom Action Buttons Component ⓘ

No. Of Actions:
Enter the number of actions to display from the various actions derived from PlatformActions.

Standard Actions:
1. Actions Powered By Platform Actions: Selecting this option will display platformaction queried from database navigating to targeted url defined in database.





The screenshot displays a vehicle record interface for a "2023 Electra Beam". At the top, a table lists vehicle details: Vehicle Name (2023 Electra Beam), Vehicle Identification Number (WADKAFPX BA986067), Engine Number (E553hFFhH 75GGURLqj 9), Current Owner (Bagster Household), Status (Sold), Last Odometer Reading (11,289.00), Odometer Reading Unit of Measure, Active Warranty Count (2), Image (car icon), and Warranty Indicator (question mark icon). Below this, the "Alerts" section shows "Warranty is expiring Septemeber 19th, 2022" and "Check Engine light is active". The "Milestones" section shows "Order Received", "Manufactured", and "Delivered". The "Details" tab is active, showing "General Information" with fields for Vehicle Name, Current Owner, Status, and Image. The "Activity" tab shows "Vehicle Paid Off" and "60,000 Mile Service". On the right, a configuration panel titled "Page > PSC Record Page Header" includes fields for "Icon Name" (custom:custom31), "Object Name (Custom)" (Car), "Header Background Color" (rgba(255,179,57,1)), "Custom Follow Buttons Component" (c/statefulButtons), "No. Of Actions" (2), "Standard Actions" (General Actions), and "Custom Action Buttons Component".

Standard Actions:

1. **General Actions:** Selecting this option will have 3 general actions displayed against standard actions slot. Those are Edit, Clone and Delete. (Note that No. Of Actions property is operational only for actions derived from platformactions)

The screenshot shows a vehicle record page for a "2023 Electra Beam". The page includes a header with a car icon, the vehicle name, and a toolbar with buttons for Follow, Edit, Clone, Delete, and a custom action button. Below the header is a table with vehicle details: Vehicle Name (2023 Electra Beam), Vehicle Identification Number (WA1DKAFPX BA986067), Engine Number (E553HFFHH 75GGURLqj 9), Current Owner (Bagster Household), Status (Sold), Last Odometer Reading (11,289.00), Odometer Reading Unit of Measure, Active Warranty Count (2), Image (car icon), and Warranty Indicator (question mark icon). The page also features an Alerts section with a warning about an expiring warranty and a check for engine light. A Milestones section shows a timeline from Order Received to Manufactured to Delivered. The bottom section has tabs for Details, Telematics, Service History, Warranties, Recalls, Cases, and More. The Details tab is active, showing General Information and Activity. The Activity section lists events like "Vehicle Paid Off" and "60,000 Mile Service".

Specify additional actions for your organization in a customized manner. Please provide the name of your dynamic Lightning Web Component (LWC) using the format 'c/componentName', where 'componentName' represents the name of your LWC component separated by a forward slash. This component will be responsible for displaying the custom action buttons.

Page > PSC Record Page Header

Header Background Color ⓘ
rgba(255,179,57,1)

Custom Follow Buttons Component ⓘ
c/statefulButtons

No. Of Actions ⓘ
2

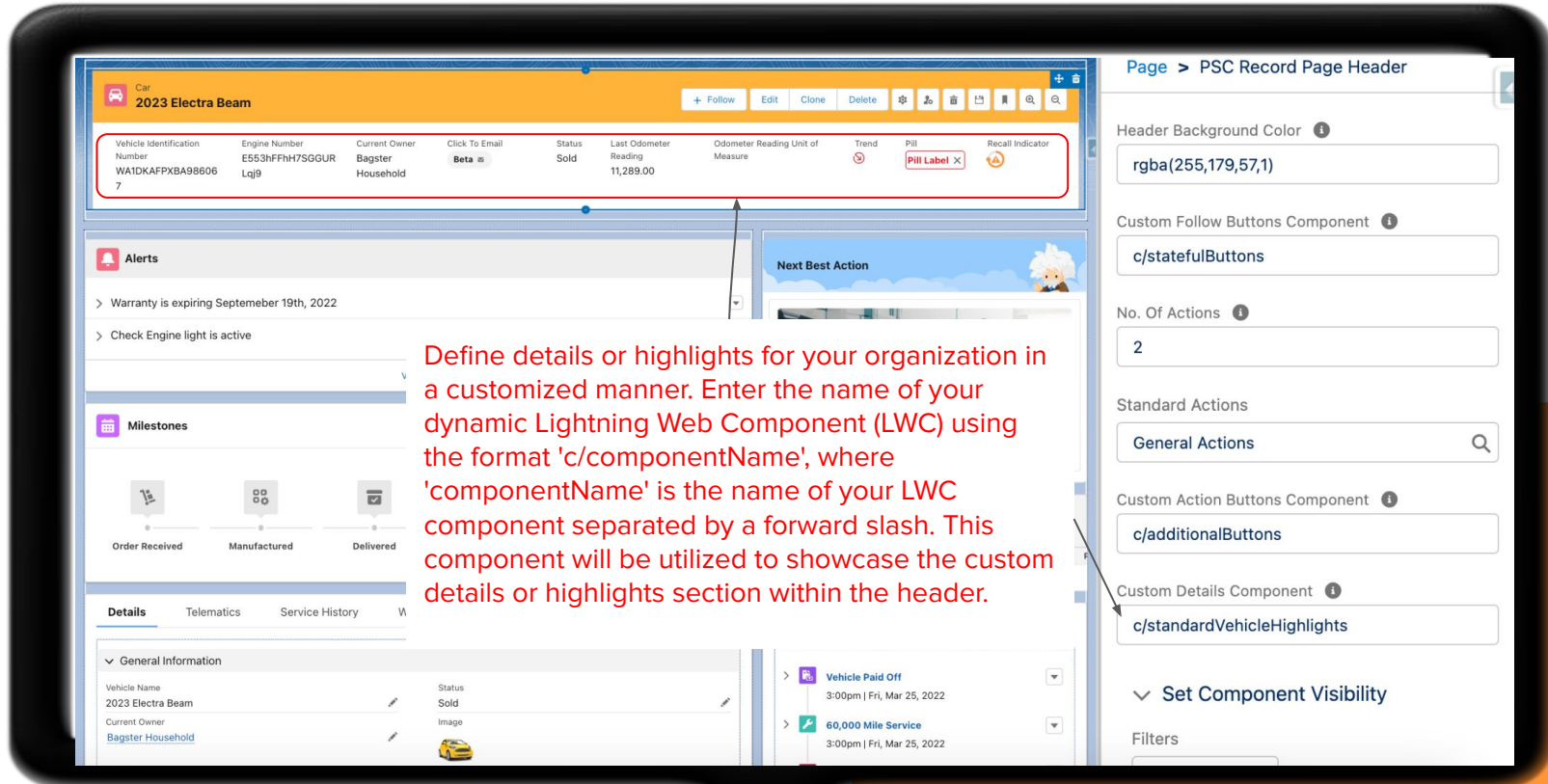
Standard Actions
General Actions

Custom Action Buttons Component ⓘ
c/additionalButtons

Custom Details Component ⓘ

Set Component Visibility

Filters



The screenshot displays a vehicle record page for a 2023 Electra Beam. The header section contains a table with the following data:

Vehicle Identification Number	Engine Number	Current Owner	Click To Email	Status	Last Odometer Reading	Odometer Reading Unit of Measure	Trend	Pill	Recall Indicator
WATDKAFPXBA986067	E553HFFH7SGGURLqj9	Bagster Household	Beta as	Sold	11,289.00			Pill Label X	

Below the header, there are sections for Alerts (Warranty expiring Septemeber 19th, 2022; Check Engine light is active), Milestones (Order Received, Manufactured, Delivered), and Details (General Information, Telematics, Service History). The General Information section shows the vehicle name (2023 Electra Beam), current owner (Bagster Household), status (Sold), and image.

On the right side, the configuration options for the PSC Record Page Header are shown:

- Page > PSC Record Page Header
- Header Background Color: `rgba(255,179,57,1)`
- Custom Follow Buttons Component: `c/statefulButtons`
- No. Of Actions: 2
- Standard Actions: General Actions
- Custom Action Buttons Component: `c/additionalButtons`
- Custom Details Component: `c/standardVehicleHighlights`
- Set Component Visibility
- Filters

Define details or highlights for your organization in a customized manner. Enter the name of your dynamic Lightning Web Component (LWC) using the format 'c/componentName', where 'componentName' is the name of your LWC component separated by a forward slash. This component will be utilized to showcase the custom details or highlights section within the header.

THANK YOU

22

The best thing about a boolean is even if you are wrong, you are only off by a bit.