



EverReady Highlights

Installation Guide

Summary

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1. Prerequisite

1. Lightning Web Security has to be enabled

Here is a link to the Salesforce documentation introducing Lightning Web Security: <https://developer.salesforce.com/docs/platform/lwc/guide/security-lwsec-intro.html>

Additionally, here is the documentation on how to perform the operation: <https://developer.salesforce.com/docs/platform/lwc/guide/security-lwsec-enable.html>

Test Lightning Web Security in a sandbox environment first and then in production.

New orgs have Lightning Web Security for Lightning web components and Aura components enabled by default. If you plan to populate a new org with pre-existing or packaged Lightning web components, be sure to test first in a sandbox environment with LWS enabled. For more information, see Workflow to Try Your LWCs with Lightning Web Security.

For information about scratch orgs, see Enable and Disable LWS in Scratch Orgs.

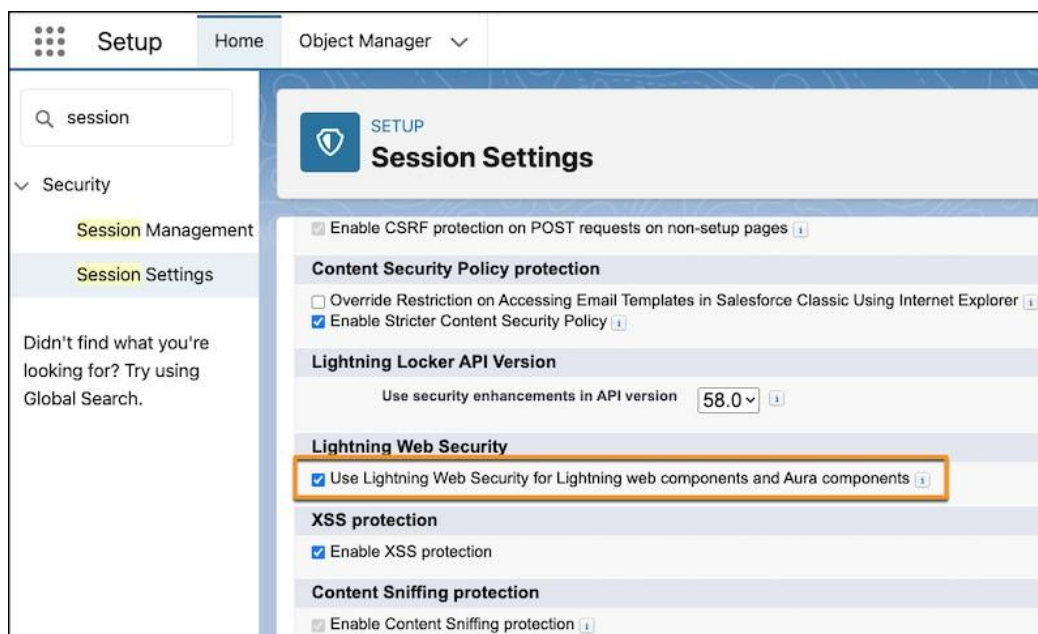
Important

Before enabling, see When to Enable Lightning Web Security to determine whether to enable it in your production org.

To use Lightning Web Security in an org:

1. From Setup, in the Quick Find box, enter Session, and then select Session Settings.
2. On the Session Settings page, select Use Lightning Web Security for Lightning web components and Aura components and save.
3. Clear your browser cache after enabling or disabling Lightning Web Security to ensure the correct files are loaded in the browser. If you suspect that the correct security architecture is not in effect, see Delayed Enabling or Disabling of LWS.

Session Settings page with Lightning Web Security selected



Important

LWS relies on Stricter CSP to fully implement its security measures. We strongly advise that you keep the Enable Stricter Content Security Policy setting switched on when LWS is enabled.

Activating this mode should not cause any regressions, but **it is strongly recommended to test this change in your Sandbox before enabling it in production.**

2. Make sure the EverReady users have **read access to the following standard fields** :

Object	Field Name
Account	ParentId
Contact	AccountId
Contact	MobilePhone
Contact	Title
Opportunity	IsWon
Opportunity	IsClosed
Event	Description
Event	Type
Event	WhoId
Event	WhatId
Event	EventSubType
Event	ActivityDateTime
Event	Subject
Event	eventDate
Task	Description
Task	Type
Task	WhoId
Task	WhatId
Task	ActivityDate
Task	TaskSubtype
Task	Subject
Task	IsClosed
Task	CompletedDateTime
Task	CallType

If you allow users to relate a contact to multiple accounts in order to use Account Contact Relationship (Account Settings > Contacts to Multiple Accounts Settings).

You have to Make sure that EverReady users have **read access to the following fields** :

Object	Field Name
AccountContactRelation	EndDate
AccountContactRelation	IsActive
AccountContactRelation	Roles
AccountContactRelation	StartDate

3. Make sure to **Enable Email to Case**

The screenshot shows the Salesforce Setup interface for the 'Email-to-Case' settings. The left sidebar contains navigation links for Setup Home, Service Setup Assistant, Commerce Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION (Users, Data, Email), and PLATFORM TOOLS (Apps). The main content area is titled 'Email-to-Case Settings' and includes a description: 'Customize the way Salesforce converts customer emails to cases. After you configure your Email-to-Case settings, add routing addresses. Each routing address is an existing email address that your customers can use to submit cases to your support team. Emails automatically convert to cases based on the routing address's settings.' Below this is a 'Settings' section with an 'Edit' button. A yellow warning box states: 'After you enable Email-to-Case, you can't disable it, but you can update its settings.' The settings are organized into two sections: 'Email-to-Case' and 'Send Emails from Cases'. The 'Email-to-Case' section includes: 'Enable Email-to-Case' (checked), 'Notify case owners on new emails' (unchecked), 'Enable HTML email' (unchecked), 'Set case source to email' (checked), 'Save Email-to-Case attachments as Salesforce files' (unchecked), 'Invoke triggers on status change from New to Read' (unchecked), and 'Reply with new content only' (unchecked). The 'Send Emails from Cases' section includes: 'Send emails via external services' (unchecked), 'Insert email threading token in email subject' (checked), 'Insert email threading token in email body' (checked), 'Use email headers for threading' (checked), and 'Place user signatures before email threads' (unchecked). An orange box highlights the 'Enable Email-to-Case' checkbox and the 'Set case source to email' checkbox.

Section	Setting	Value
Email-to-Case	Enable Email-to-Case	✓
	Notify case owners on new emails	✗
	Enable HTML email	✗
	Set case source to email	✓
	Save Email-to-Case attachments as Salesforce files	✗
	Invoke triggers on status change from New to Read	✗
	Reply with new content only	✗
Send Emails from Cases	Send emails via external services	✗
	Insert email threading token in email subject	✓
	Insert email threading token in email body	✓
	Use email headers for threading	✓
	Place user signatures before email threads	✗

2. Package Installation

- 4. Get the [EverReady](#) App from AppExchange.
- 5. Choose the **Install for Admins Only** option. Application access will be managed using permission sets. Click on the **Install** button to start the installation of the package.



Install EverReady Highlights

By EVERREADY.AI



☒ **Install for Admins Only**



☐ **Install for All Users**



☐ **Install for Specific Profiles...**

Install

Cancel

App Name	Publisher	Version Name	Version Number
EverReady Highlights	EVERREADY.AI	Spring '24	0.0 (Beta 2)

Description

"EverReady Highlights" is our new Salesforce app that improves your win rate. Get a unique view of your prospects' engagement and involvement in your sales cycle. Make sure you're in the right position to sign!

Additional Details [View Components](#)

- 6. A "processing" screen will appear



Install EverReady Highlights

By EVERREADY.AI

 **Installing and granting access to admins Only...**

App Name	Publisher	Version Name	Version Number
EverReady Highlights	EVERREADY.AI	Spring '24	0.0 (Beta 2)

Description

"EverReady Highlights" is our new Salesforce app that improves your win rate. Get a unique view of your prospects' engagement and involvement in your sales cycle. Make sure you're in the right position to sign!

Additional Details [View Components](#)

7. If the installation is too long and an email will be sent to you when the installation is complete, else click on the **Done** button.



Install EverReady Highlights

By EVERREADY.AI

**Installation Complete!**

Done

App Name	Publisher	Version Name	Version Number
EverReady Highlights	EVERREADY.AI	Spring '24	0.0 (Beta 2)

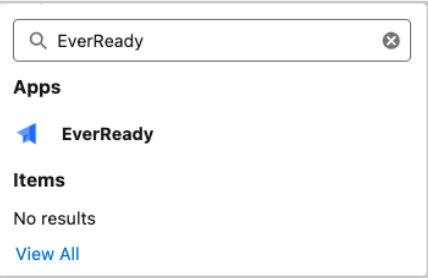
Description

"EverReady Highlights" is our new Salesforce app that improves your win rate. Get a unique view of your prospects' engagement and involvement in your sales cycle. Make sure you're in the right position to sign!

8. After installation, the package will appear in the list of installed packages.

3. EverReady App

From the App Launcher, search for the **EverReady** app and launch it :



- On the **Hierarchies** tab, you can configure:

Hierarchies							New	Import	Change Owner	Printable View
All ▾										
4 Items • Sorted by Name • Filtered by All hierarchies • Updated a minute ago							Search this list...			
☐	Name ↑	Level	Position	Created Date	Last Modified Date	Created By				
1	☐ LVL-00	ASSISTANT	1	26/02/2024 16:07	26/02/2024 16:07					
2	☐ LVL-01	MANAGER;TEAM_LEADER	2	26/02/2024 16:07	05/03/2024 12:57					
3	☐ LVL-02	DIRECTOR	3	26/02/2024 16:07	26/02/2024 16:07					
4	☐ LVL-03	EXECUTIVE	4	26/02/2024 16:07	26/02/2024 16:07					

- Level**: the hierarchical level of the contacts, multiple values can be chosen.
- Position**: the line display order in the cartography, unique value from 1 to 4.

- On the **Business Families**, you can configure:

Business Families							New	Import	Change Owner	Printable View
All ▾										
4 Items • Sorted by Name • Filtered by All business families • Updated a few seconds ago							Search this list...			
☐	Name ↑	Department	Position	Created Date	Last Modified Date	Created By				
1	☐ DEPT-00	FINANCE	1	26/02/2024 16:07	26/02/2024 16:07					
2	☐ DEPT-01	MARKETING;COMMUNICATION	2	26/02/2024 16:07	05/03/2024 12:58					
3	☐ DEPT-02	IT	3	26/02/2024 16:07	26/02/2024 16:07					
4	☐ DEPT-03	RH	4	26/02/2024 16:07	26/02/2024 16:07					

- Department**: the service department of the contacts, multiple values can be chosen.
- Position**: the column display order in the cartography, unique value from 1 to 4.

4. Activity Weighting

The engagement calculation is =

$$(\text{incoming activities} * \text{their weighting}) / (\text{all activities} * \text{their weighting})$$

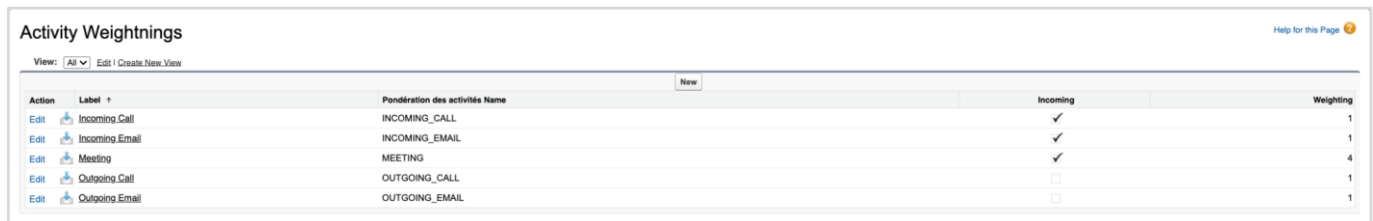
You can customize weightings in order to impact the engagement calculation, as explained in the next paragraphs.

You can use:

- Default Weightings to customize the default weighting.
- Custom Weightings that you can link to as Task Subject / Topic value.

4.1. Activity Weighting

From the **Setup**, under **Custom Code** section, select **Custom Metadata Types** and then click on **Manage Records** on the **Activity Weighting** row:



The screenshot shows the 'Activity Weightings' table in Salesforce Setup. The table has columns for 'Action', 'Label', 'Pondération des activités Name', 'Incoming', and 'Weighting'. There are 5 rows of data, each with an 'Edit' link and a 'New' button. The 'Incoming' column has checkboxes, and the 'Weighting' column has numerical values.

Action	Label	Pondération des activités Name	Incoming	Weighting
Edit	Incoming Call	INCOMING_CALL	☒	1
Edit	Incoming Email	INCOMING_EMAIL	☒	1
Edit	Meeting	MEETING	☒	4
Edit	Outgoing Call	OUTGOING_CALL	☐	1
Edit	Outgoing Email	OUTGOING_EMAIL	☐	1

You can customize the weighting of these 5 activity types for the engagement calculation.

4.2. Custom Weighting Mappings

If you want to customize Weightings by mapping Task Subject/Topic values to a new activity type, you have to:

- 1- From Setup > Object Manager > on **EmailMessage and Activity** objects:
 - a. Activity object is used for Task and Event (Salesforce's architecture)
 - b. You have to do it on EmailMessage object separately (Salesforce's architecture)
 - c. Fill the values for the field Topic (eready__Topic__c) on both objects, as it will be linked to Task Subject later

Setup Home Object Manager

SETUP > OBJECT MANAGER
Activity

Details

Fields & Relationships

Buttons and Links

Object Limits

Search Layouts

List View Button Layout

Fields & Relationships
3 Items, Sorted by Field Label

FIELD LABEL FIELD NAME DATA TYPE

Running User Profile Type nativevideo__RunningUserProfileType__c Formula (Text)

Topic eready__Topic__c Picklist

Video Junction nativevideo__Video_Junction__c Lookup(Video Junction)

SETUP > OBJECT MANAGER
Activity

Details

Fields & Relationships

Buttons and Links

Object Limits

Search Layouts

List View Button Layout

Controlling Field [New]

Picklist Values Used
Active and inactive picklist values 10 (1 000 max)

Field Dependencies New
No dependencies defined.

Values New Reorder Replace Printable View Chart Colors
Delete Selected Deactivate Selected Replace Selected

Action	Values	API Name	Default	Chart Colors
☐ Edit Del Deactivate	Default	Default	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 2	Default 2	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 3	Default 3	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 4	Default 4	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 5	Default 5	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 6	Default 6	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 7	Default 7	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 8	Default 8	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 9	Default 9	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 10	Default 10	☐	Assigned dynamically

d. You can also add Topic fields to Page Layouts for:

- i. Task object
- ii. Event object
- iii. EmailMessage object

Email Message

Details

Fields & Relationships

Page Layouts

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Related Lookup Filters

Search Layouts

Page Layouts

1 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME

CREATED BY

[Email Message Layout](#)

Email Message

Details

Fields & Relationships

Page Layouts

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Related Lookup Filters

Search Layouts

List View Button Layout

Triggers

Flow Triggers

Validation Rules

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Buttons

Quick Actions

Mobile & Lightning

Actions

Expanded Lookups

Related Lists

Quick Find Field Name

Section

Blank Space

Automation Type

BCC Address

CC Address

Created By

Created Date

First Opened

From

From Address

From Name

Has Attachment

Headers

HTML Body

Is Externally Vis...

Is Incoming

Is Private Draft

Last Modified By

Last Modified Date

Last Opened

Message Date

Message Size

Parent Case

Related To

Status

Subject

Text Body

To Address

Topic

Salesforce Mobile and Lightning Experience Actions

Delete Reply All Reply Forward

Email Message Detail

Standard Buttons

Delete

Change Record Type

Printable View

Cancel SDR Agent Outreach

Manage Associations

Custom Buttons

Information

Related To

Sample Text

Message Date

27/05/2025 14:27

Created By

Sample Text

Status

Sample Text

Last Modified By

Sample Text

Address Information

From Address

sarah.sample@company.com

From Name

Sample Text

To Address

Sample Text

CC Address

Sample Text

BCC Address

Sample Text

Message Content

Subject

Sample Text

Topic

Sample Text

HTML Body

Sample Text

Text Body

Sample Text

2- from the **Setup**, under **Custom Code** section, select **Custom Metadata Types**, click on **Manage Records** on the **Activity Weighting** row and then click on the **New** button:

- fill the standard fields **Label** and **Pondération des activités Name** as you wish,
- fill the field **Object**
 - = the standard object you want to match
 - Example: if you select “Task”, it will consider the tasks you create (with the right Topic) for the calculation.

- fill the field **Interaction type**
 - = the type of interaction you want to classify
 - **Task** object can be classified as a Call, Meeting or Email
 - **Event** object can only be classified as a Meeting
 - **EmailMessage** object can only be classified as an Email
 - Example: if you select “Meeting”, it will consider the tasks you create (with the right topic) as a meeting.
- check the field **Incoming** if needed
 - Call and Meeting interaction types are considered as Incoming, whether you check it or not.
 - For Email interaction type:
 - If you check Incoming => it will consider the incoming emails.
 - If you don't check incoming => it will consider the outbound emails (and potentially lower your engagement rate).
 - Example: if you select “Email” and check “Incoming”, it will consider the tasks you create (with the right topic) as an incoming email.
- check **IsActive** checkbox
- fill the field **Weighting** as you wish
 - This is where you define the weight for your interaction, that will impact the engagement calculation.
 - Example: if you select “Email”, check “Incoming” and fill a weighting as 100, it will consider the tasks you create (with the right topic) as an incoming email with a 100 weighting.
- click on the **Save** button.

The screenshot shows the 'SETUP Custom Metadata Types' interface. The main heading is 'Pondération des activités'. Below it, there's a sub-heading 'Pondération des activités Edit' with 'Save', 'Save & New', and 'Cancel' buttons. The 'Information' section contains the following fields:

- Label:** A text input field.
- Pondération des activités Name:** A text input field with an information icon.
- Object:** A dropdown menu currently set to 'Task'.
- Interaction type:** A dropdown menu currently set to 'Call'.
- Incoming:** A checkbox that is currently unchecked.
- IsActive:** A checkbox that is currently unchecked.
- Protected Component:** A checkbox that is currently unchecked, with an information icon.
- Weighting:** A text input field.

At the bottom of the form, there are 'Save', 'Save & New', and 'Cancel' buttons.

=> This setting is not yet completed, you need a last step to make it work.

3- from the **Setup**, under **Custom Code** section, select **Custom Metadata Types**, click on **Manage Records** on the **Custom Weighting Mappings** row and then:

- fill the standard fields **Label** and **Task Subject Mapping Name** as you wish
- fill the **Activity Weighting** lookup field with one of the Custom Activity Weighing records you just created (as explained on last paragraph)
 - It is the link you need to apply the right weighting => if you don't link an Activity Weighting, it won't work.
- fill the **Task Subject** field with an existing value for the fields **"Topic"** on your org
 - Use the **API Name** of the Topic value:

SETUP > OBJECT MANAGER

Activity

Controlling Field [New]

Picklist Values Used

Active and inactive picklist values 10 (1 000 max)

Field Dependencies [New]

No dependencies defined.

Values

[New] [Reorder] [Replace] [Printable View] [Chart Colors ▼]

[Delete Selected] [Deactivate Selected] [Replace Selected]

Action	Values	API Name	Default	Chart Colors
☐ Edit Del Deactivate	Default	Default	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 2	Default 2	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 3	Default 3	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 4	Default 4	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 5	Default 5	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 6	Default 6	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 7	Default 7	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 8	Default 8	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 9	Default 9	☐	Assigned dynamically
☐ Edit Del Deactivate	Default 10	Default 10	☐	Assigned dynamically

- It is the link you need to match the Topic you will choose on your records => if you don't use the right Topic API Name, it won't work.
- Example:
 - On Activity Weighting: if you select "Email", check "Incoming" and fill a weighting as 100 and then;
 - On Custom Weighting Mapping: if you select the right Topic API Name as Task Subject, it will consider the tasks you create with this same Topic as an incoming email with a 100 weighting.
 - Here is an example on a Task, where you can choose a Topic value to make it match:

- check **IsActive** checkbox
- click on the **Save** button.

4.3. Other precisions

- You are limited to 10 custom weightings.
- For a record to be considered it has to be:
 - Completed: a task should be completed, a meeting or call should be done and an email should be sent to be considered.
 - Assigned to:
 - The right user should be assigned to a task, meeting or a call to be considered.
 - For an email, it's the user in "created by" field who is considered.
 - Related to:
 - The right account should be related to a task, meeting or a call to be considered.

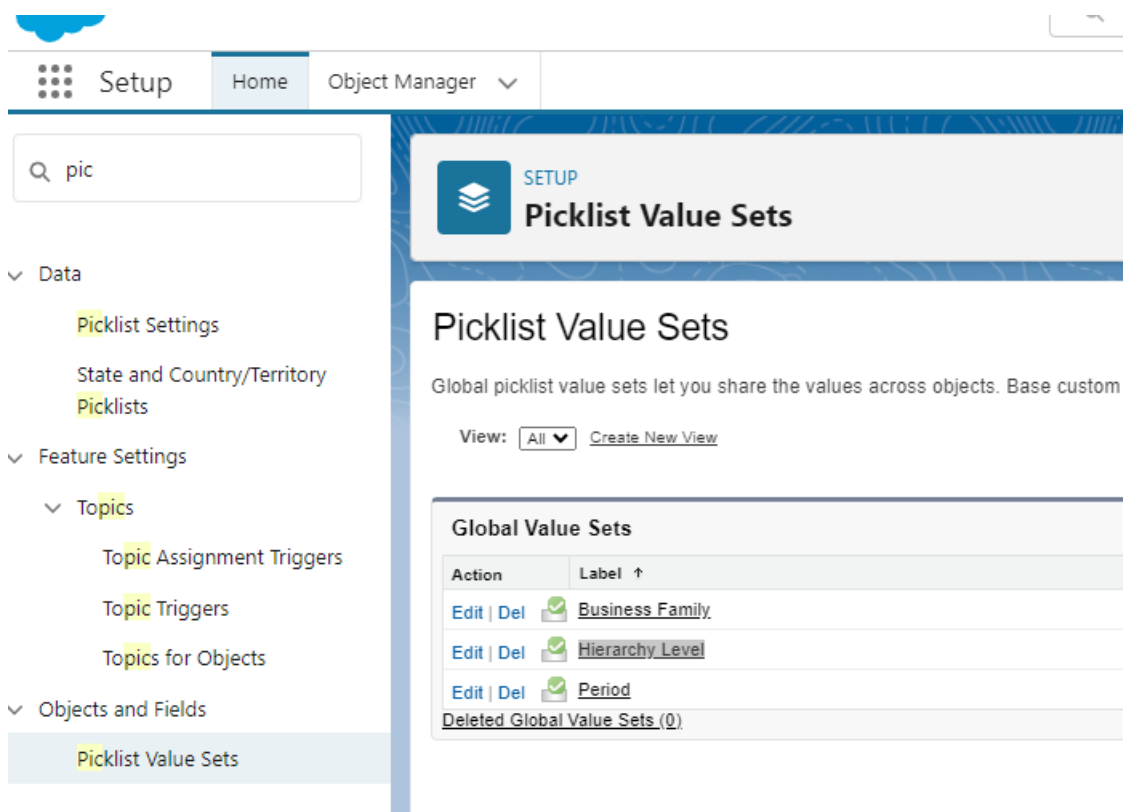
- For an email “related to” can be blank as long as you have the contacts linked.
- Name:
 - The right contact should be filled in “Name” field for a task, meeting or a call to be considered.
 - The right contacts should be filled in “Send and recipients” related list for an email to be considered.

5. Add new hierarchies

5.1. Hierarchy value on Contact and eready_Hierarchy__c objects

First you must add hierarchy value to the global picklist

- Go to setup/Picklist Value Set and click on **Hierarchy Level** link



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'pic' and a navigation menu. The main content area is titled 'Picklist Value Sets' and shows a table of 'Global Value Sets'.

Action	Label ↑
Edit Del	Business Family
Edit Del	Hierarchy Level
Edit Del	Period

Deleted Global Value Sets (0)

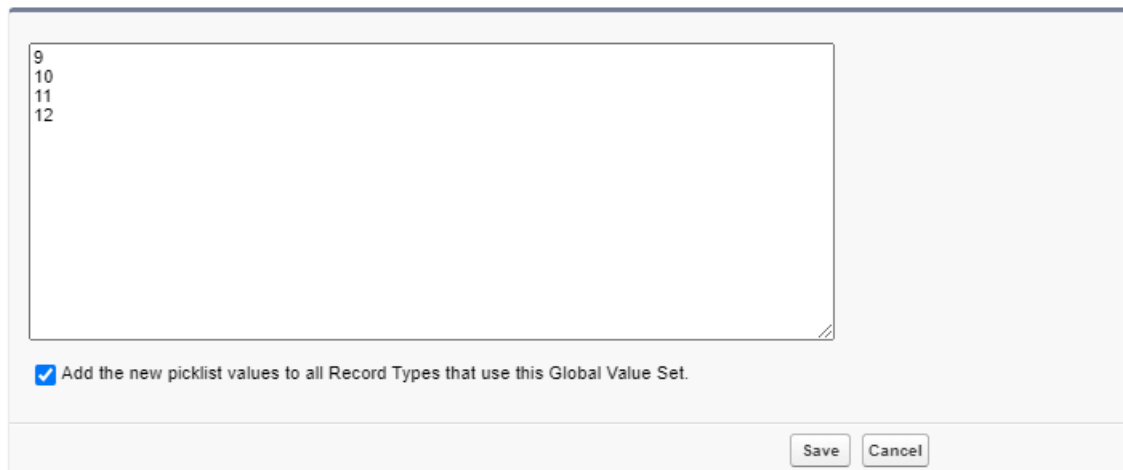
- Next, click on **New** button
- fill the **Weighting** field if you want to override the default weighting.
- click on the **Save** button on the Values associated list view and enter all the API values you want (line breaks separated) and save

Hierarchy Level

Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name

If a value matches an inactive value's API name, that value is reactivated with its previous label.

If a value matches an inactive value's label but not the API name, a new value is created.



9
10
11
12

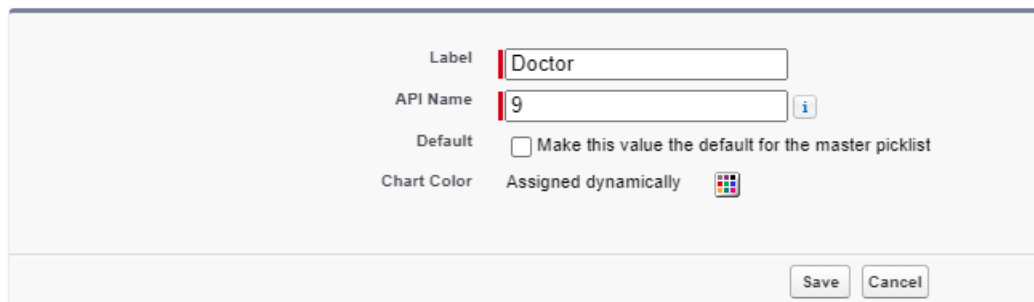
☒ Add the new picklist values to all Record Types that use this Global Value Set.

Save Cancel

- You can modify the label of each value by clicking on the edit button located right in front of each value (Only modify the label).

Hierarchy Level

Enter a name for the picklist value below. Check the box to use this value as the default value.



Label

API Name 

Default ☐ Make this value the default for the master picklist

Chart Color Assigned dynamically 

Save Cancel

- If your organization is multilanguage, you can add translate in the “translate” menu workbench



To get started in the Translation Workbench:

1. Select a language (if you're a translator for more than one language).
2. Select a setup component.
3. If necessary, select an object and aspect. For example, a workflow task has an object (As
4. Double click in the translation column to enter new values. You can tab to jump to the ne

Select the filter criteria:

Language

Setup Component

Show Inactive Values ☐

Value Label

Business Family

Hierarchy Level

10

11

12

9

ASSISTANT

DIRECTOR

EXECUTIVE

MANAGER

TEAM_LEADER

UNKNOWN

Period

1-10 of 10

5.2. Hierarchy weighting

When you add new hierarchies, you must specify the weight of each hierarchy and which hierarchy is a decision maker

You must specify the weight of each hierarchy, and which hierarchy is a decision maker

- Go to setup / custom metadata types and click to “**Manage Records**” link right in front of the Weighting
- Click new and set the values you want
 - **Label** : the value you desire
 - **Decision Maker Weighting Name** : the value you desire
 - **Weighting** : The weight that counts for the current hierarchy
 - **HierarchyLevel** : The **API name** of the value you add on the contact and Hierarchy Object

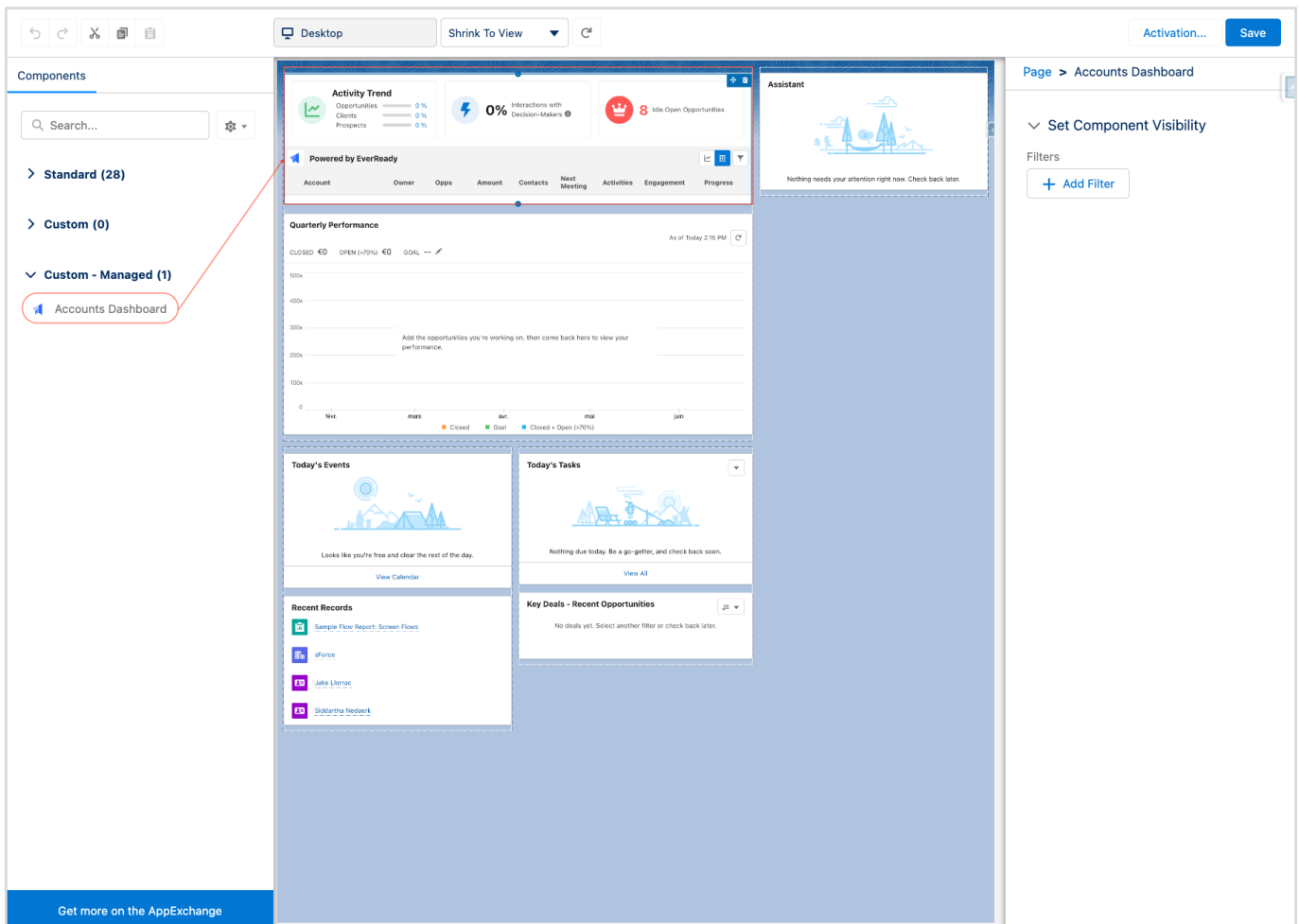
6. Contacts Cartography

1. Open an Account record
2. From the Global Header, click on the **Setup** icon and then on the **Edit Page** option.
3. If you have the Tabs component on the Record Page, you can add a new Tab:
 - Tab Label : **Custom**
 - Custom Label : **Highlights**
4. From the left panel, go to the **Custom - Managed** section and then drag & drop the **Contacts Cartography** component inside the **Highlights** tab
5. If you click on the **Contacts Cartography** component, you will see the component's properties on the right panel that you can use to override standard labels:
 - Line [N] label: Custom Label for the line N (from bottom to top)
 - Column [N] label: Custom Label for the column N (from left to right)

The screenshot displays the Salesforce interface for configuring the 'Contacts Cartography' component. On the left, the 'Components' panel shows the 'Custom - Managed (1)' section with 'Contacts Cartography' selected. The main area shows a preview of the component, which is a grid with rows labeled 'EXECUTIVE', 'DIRECTOR', 'MANAGER', and 'ASSISTANT', and columns labeled 'FINANCE', 'MARKETING', 'IT', and 'RH'. The grid is titled 'Powered by EverReady'. On the right, the 'Page > Contacts Cartography' configuration panel is visible. It includes input fields for 'Line 1 label' through 'Line 4 label' and 'Column 1 label' through 'Column 4 label'. Below these fields is a section titled 'Set Component Visibility' with a 'Filters' section and an 'Add Filter' button. Red lines connect the labels in the configuration panel to the corresponding labels in the grid preview.

7. Accounts Dashboard

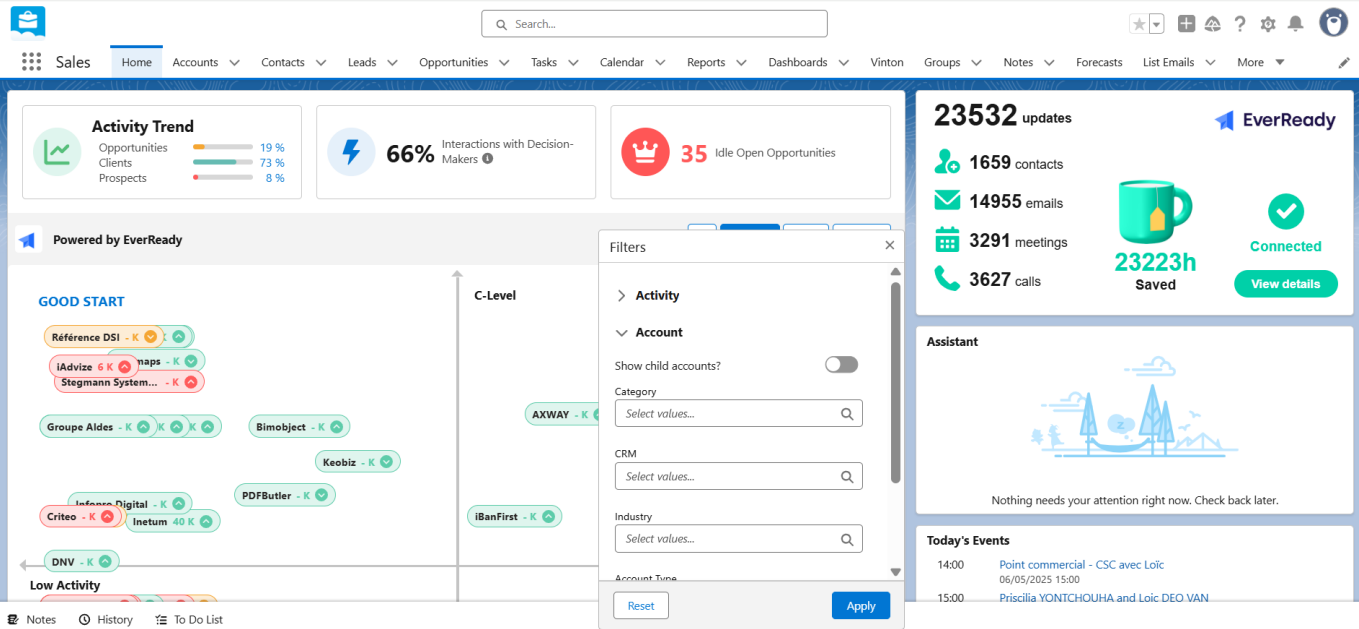
1. Open your Home Page
2. From the Global Header, click on the **Setup** icon and then on the **Edit Page** option.
3. From the left panel, go to the **field API name** section and then drag & drop the **Accounts Dashboard** component on a flexi page region.



8. Dynamic filters (Dashboard/Graph)

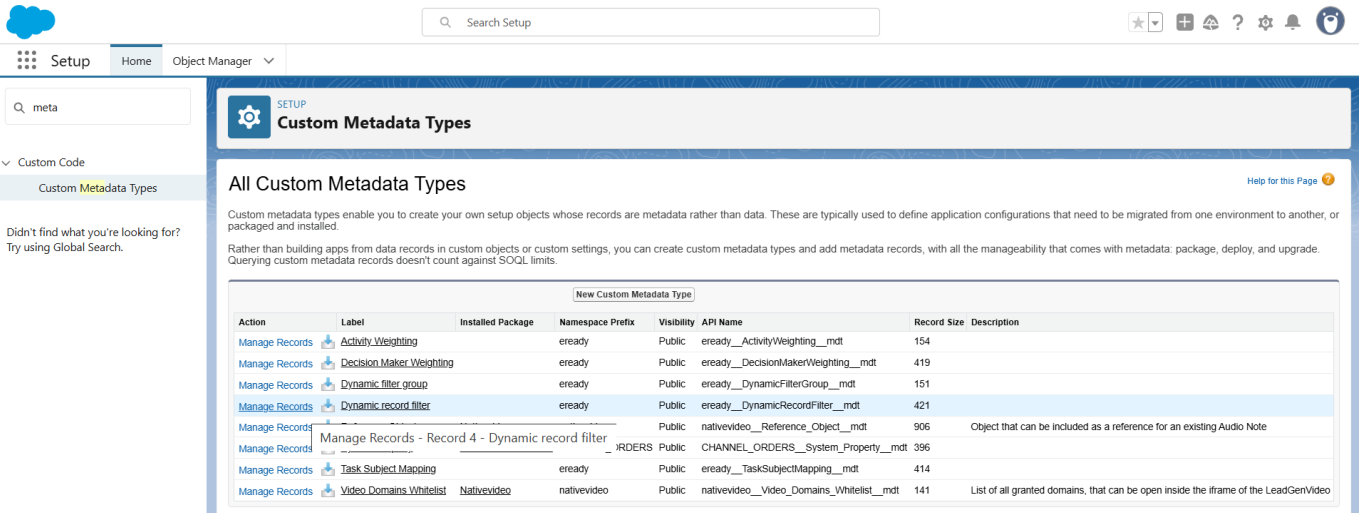
You can customize the dashboard and graph filters using picklist values from both **Accounts** and **Opportunities**, whether they are standard or custom fields. Up to **5 custom filters** can be added for each.

This allows users to better filter and display the relevant companies in the dashboard and graphs.



Simply follow these steps to add up to five filters using picklist or multi-picklist fields of your choice:

1/ Go to **Setup > Custom Metadata Types**, then click the **Manage Records** link next to the **Dynamic record filter**.



2/ Click **"New"** and complete the required fields. In the **Field API Name** field, enter the API name of the field you want to use as a filter, and select the appropriate **Field Type**. Next, link the record to the corresponding **filter group using lookup (defaultAccount or defaultOpportunity)**, then save.

Repeat this process for each field you want to filter (maximum of 5 fields per filter group).

The image shows two overlapping browser windows from Salesforce. The background window is the 'Custom Metadata Types' setup page, specifically the 'Dynamic record filter' section. It shows fields for 'Label' (Category), 'Dynamic record filter Name' (Category), 'Field API name' (Category__c), 'Dynamic filter group' (empty), and 'Field type' (Picklist). The foreground window is a 'Lookup' page, showing a search bar and a table of 'Recently Viewed DynamicFilterGroups'.

Label	Dynamic filter group Name	Namespace Prefix
defaultAccount	defaultAccount	eready
defaultOpportunity	defaultOpportunity	eready

3/ Go to the **Home** page, click on the **Filter** button, then click **Reset**. Finally, refresh your browser — your new filters should now appear!

The image shows the Salesforce Home page. The top navigation bar includes 'Sales', 'Home', 'Accounts', 'Contacts', 'Leads', 'Opportunities', 'Tasks', 'Calendar', 'Reports', 'Dashboards', 'Vinton', 'Groups', 'Notes', 'Forecasts', 'List Emails', and 'More'. The main content area features several widgets: 'Activity Trend' (Opportunities 19%, Clients 73%, Prospects 8%), 'Interactions with Decision-Makers' (66%), 'Idle Open Opportunities' (35), and a summary of updates (23532). A 'Powered by EverReady' section displays a 'GOOD START' timeline with various account names and their activity levels. A 'Filters' modal is open, showing filters for 'Activity', 'Account', 'CRM', and 'Industry'. The 'Account' filter is expanded, showing a 'Show child accounts?' toggle and search fields for 'Category', 'CRM', and 'Industry'. The 'Today's Events' section shows upcoming meetings.