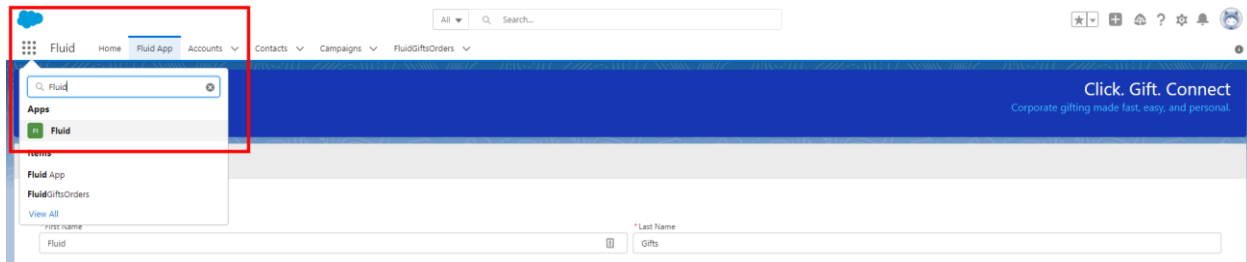


POST INSTALLATION IN FLUID GIFTS

Step 1 is required to be able to send/manage Fluid Gifts via Salesforce. The subsequent steps are optional depending on where you want to be able to send gifts from. We recommend adding all the available functionality to make sending gifts with Fluid as easy as possible.

1: Onboarding Process

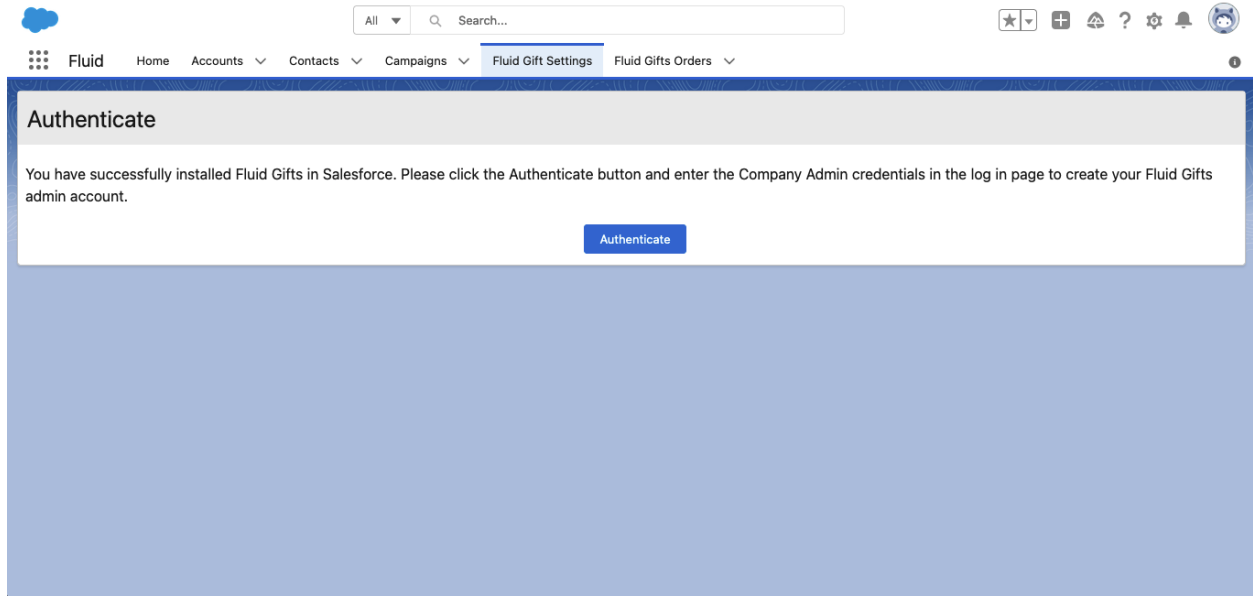
A. Go to Fluid -> Fluid Gift Settings tab



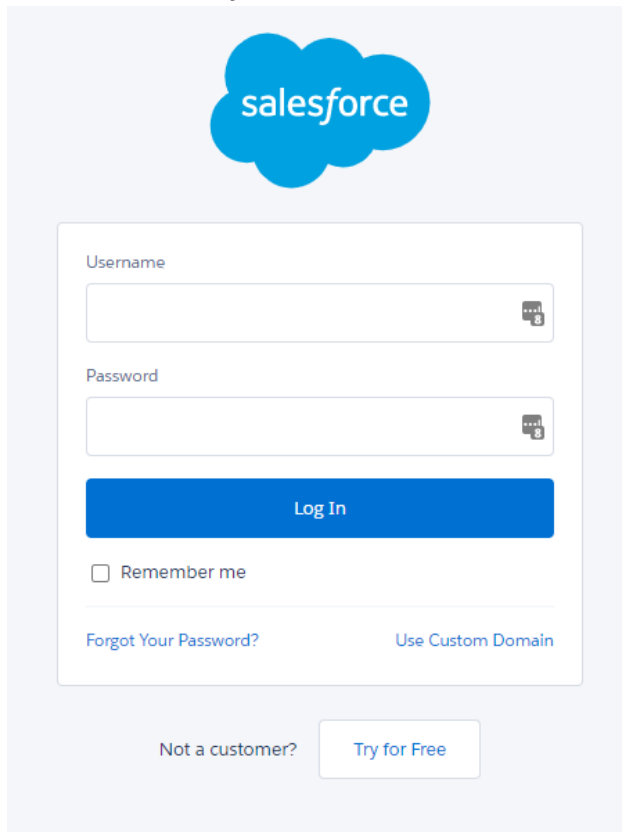
B. Fill in the required fields and set the necessary configurations. Then click the Create button.

A screenshot of the Fluid Account setup form. The form is divided into several sections: Fluid Account, Payment Information, Company Budget, Select Users, Existing Fluid Users, Notifications, Daily Digest, and Create Task. The Fluid Account section contains fields for First Name, Last Name, Email, Phone Number, and Address. The Payment Information section contains fields for Card Number, Cardholder Name, and Expiry Date. The Company Budget section contains fields for Budget Limit and Budget Period. The Select Users section contains a table with columns for Name, Email, Phone, and Username. The Existing Fluid Users section contains a table with columns for Name, Email, Phone, and Username. The Notifications section contains a table with columns for Notification Type and a checkbox for Enable. The Daily Digest section contains a table with columns for Frequency and a checkbox for Enable. The Create Task section contains a field for Specify the number of days when a follow-up task is created.

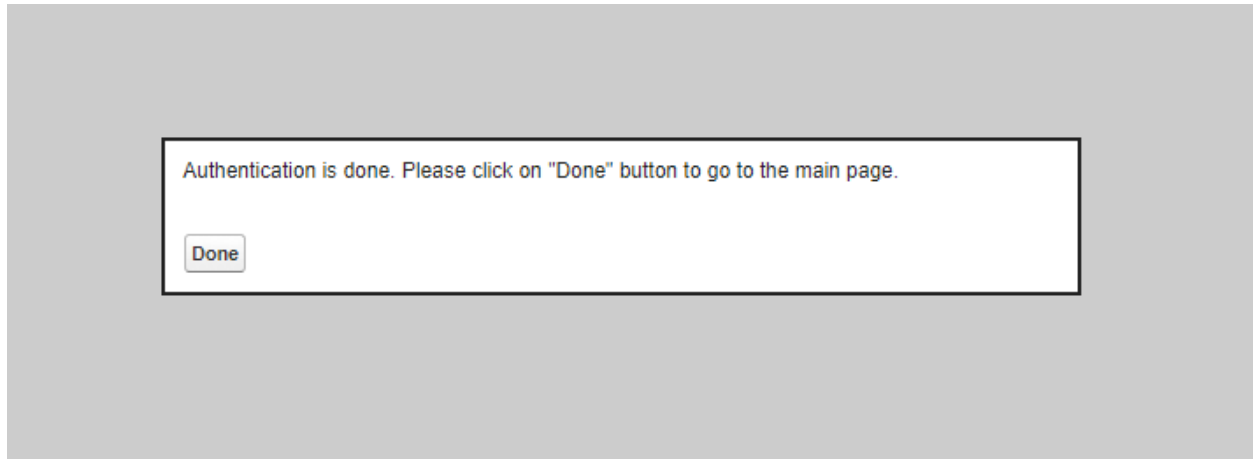
C. After the account is created, you will be redirected to the page where you need to authenticate the user. Click the “Authenticate” button.



D. Enter your Salesforce credentials then login.

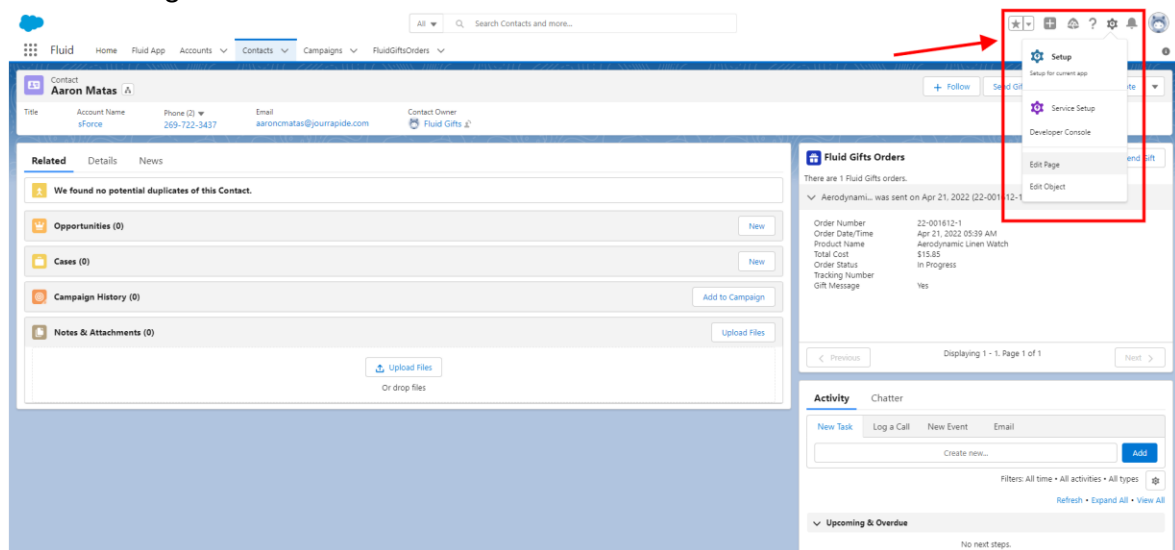


E. After you've successfully logged in, you will be redirected to this page. Click the "Done" button to go to the main page.

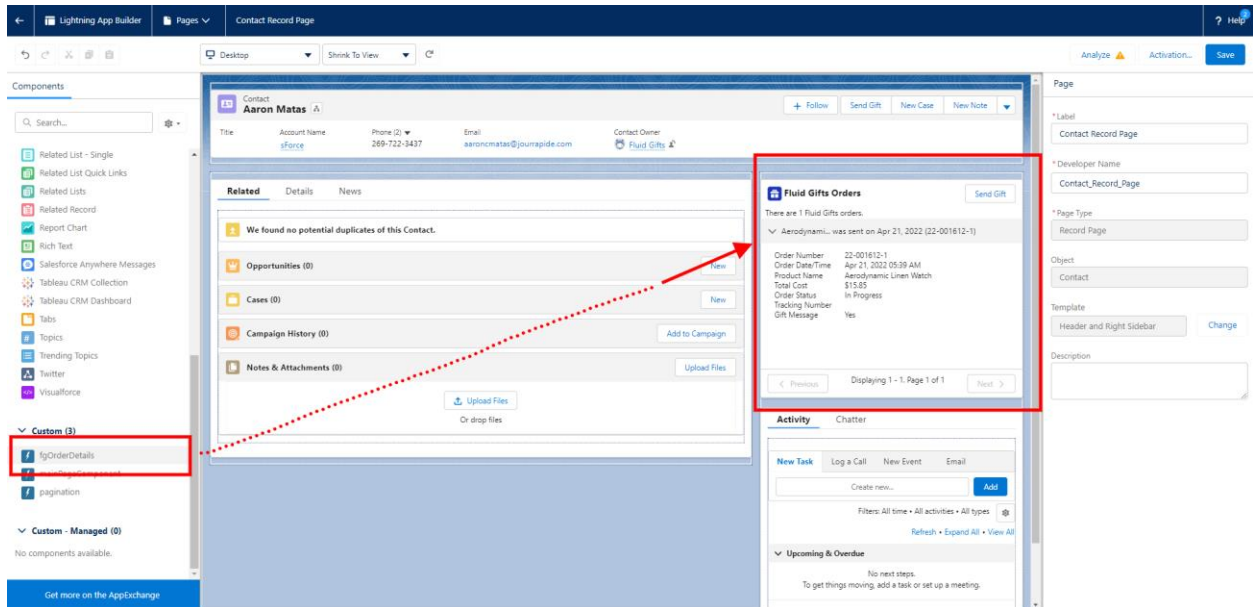


2: Add "Send Gift" button and Fluid Gifts order section in the Contact page

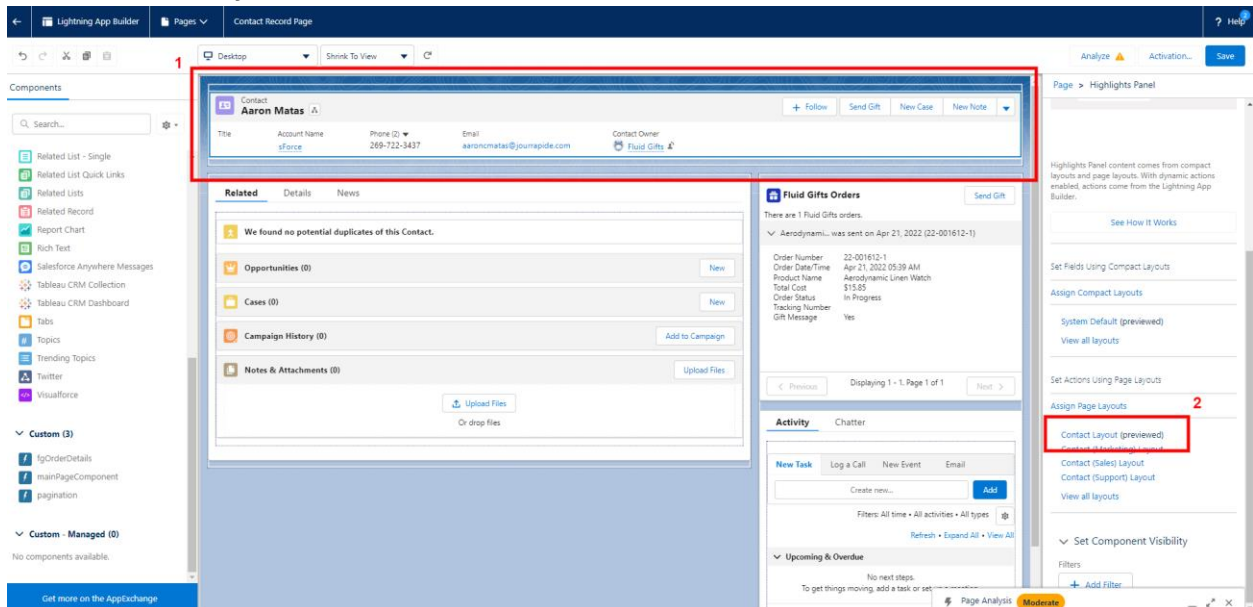
- Select a Contact -> click Setup (gear icon in upper-right corner) -> Edit Page



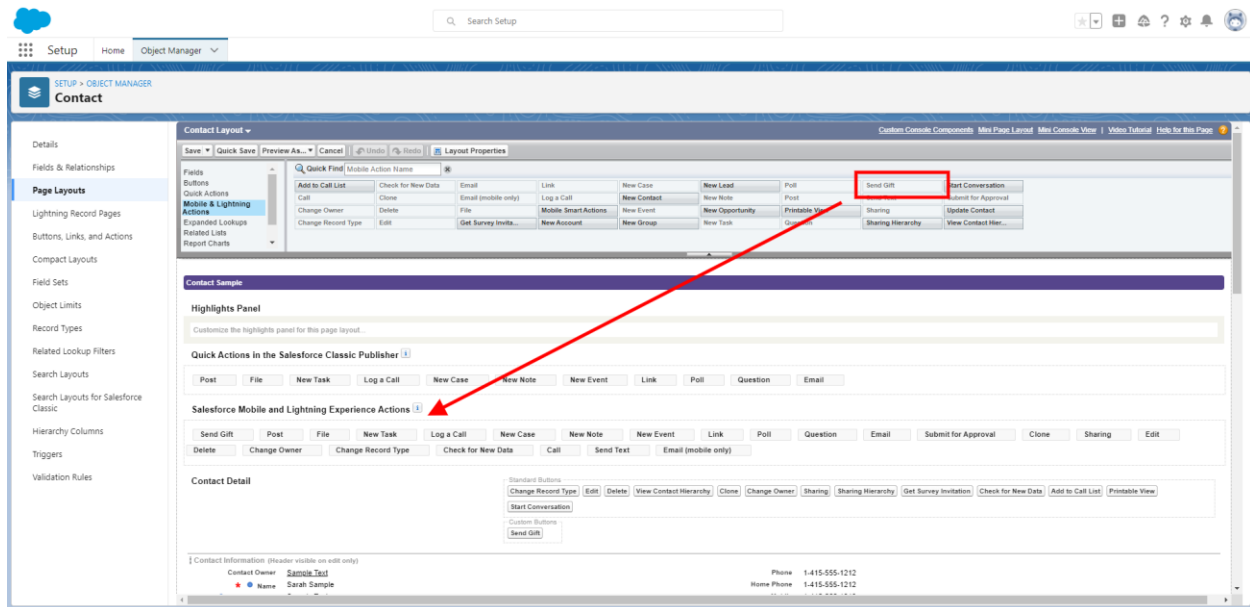
- b. In Components (left-side bar), under the Custom select the “fgOrderDetails” and drag to layout. Then press Save.



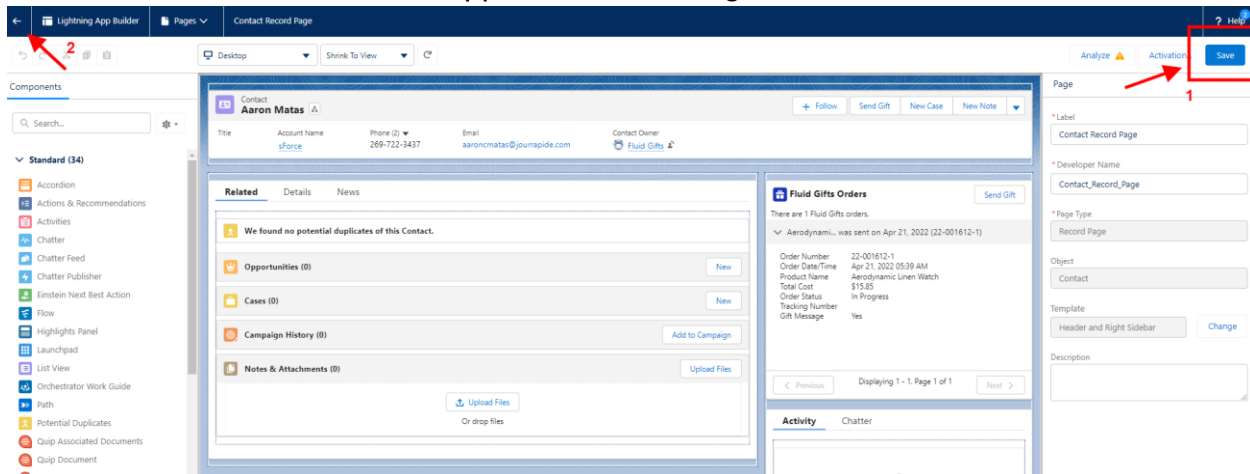
- c. To add the Send Gift button, select the page header (1) then click on the page layout with the label “previewed”. (2) In this example, Contact Layout.



- d. Select the **Mobile & Lightning Actions** -> drag the **“Send Gift”** button into the **Salesforce Mobile and Lightning Experience Actions** section.

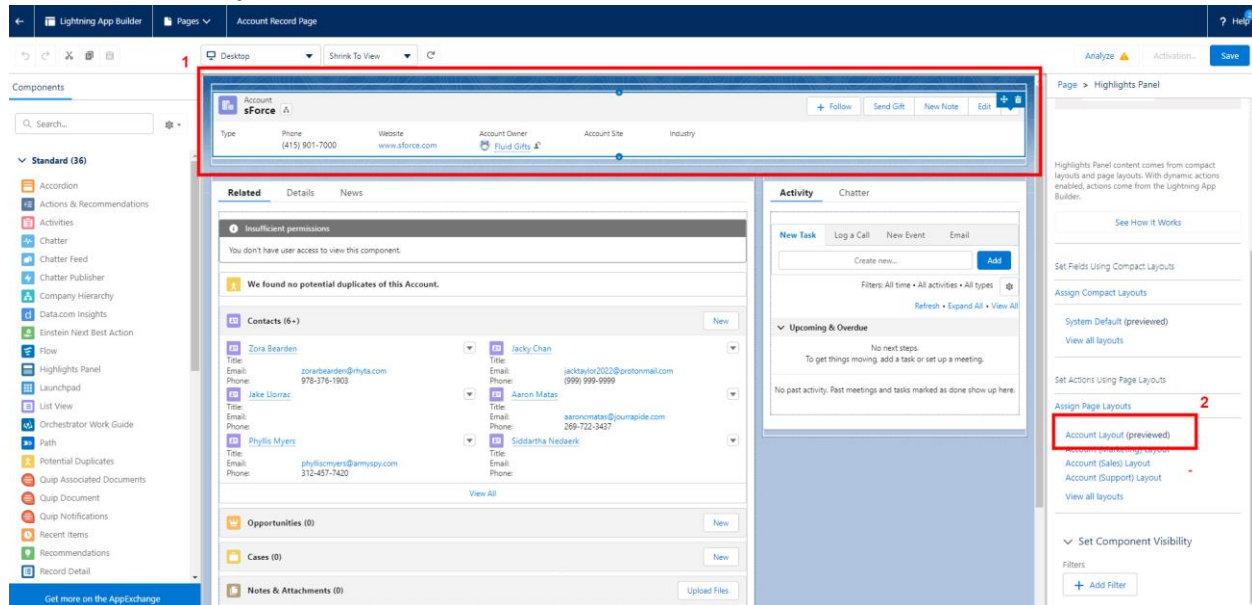


- e. Then Save the page layout.
- f. Select Contact Record Page, click (1) **Save** again. (wait until the prompt, “Changes saved.”) or click Activate -> Assign as Org Default. (2) Then click arrow in the upper left corner to go back.

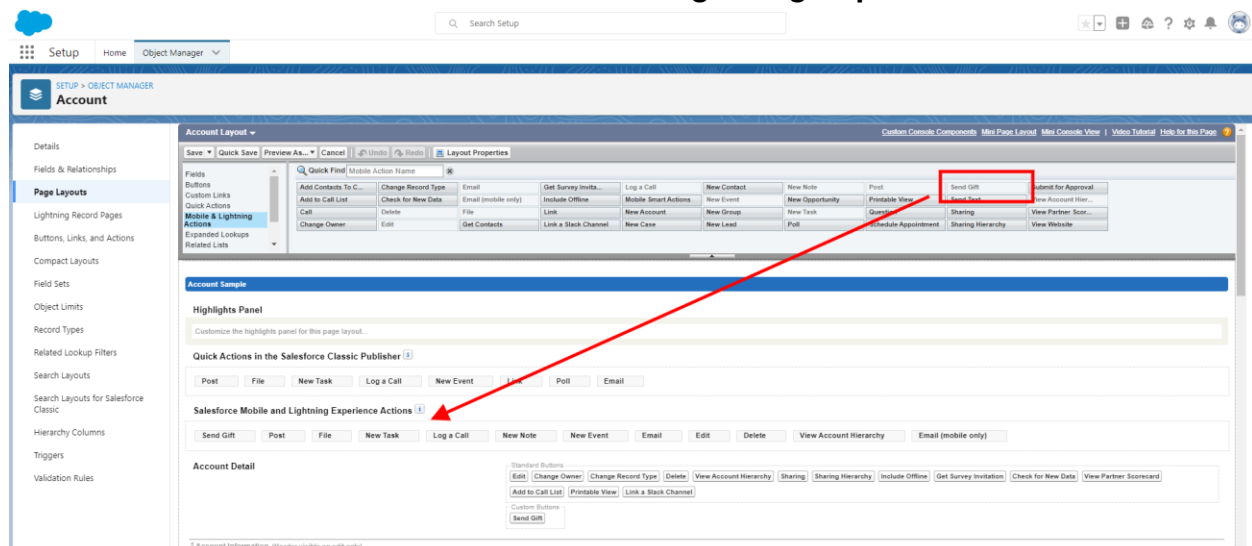


3: Add “Send Gift” button in the Account page

- Select an Account -> click Setup (gear icon in upper-right corner) -> Edit Page
- To add the Send Gift button, select the page header (1) then click on the page layout with the label “previewed”. (2) In this example, Account Layout.



- Select the **Mobile & Lightning Actions** -> drag the “Send Gift” button into the **Salesforce Mobile and Lightning Experience Actions** section.



- Then Save the layout.

- e. Select Account Record Page, click (1) **Save**. (wait to display the prompt, “Changes saved.”) or click Activate -> Assign as Org Default. (2) Then click arrow in the upper left corner to go back.

4: Add “Send Gift” button in the Account Opportunities list view

- a. In the Account Page Layout, scroll down to the related Opportunities section and click on the wrench

Contact Name	Account Name	Title	Direct	Email	Phone	Roles	Mailing City
Sarah Sample	Sample Text	Sample Text	✓	sarah.sample@company.com	1-415-555-1212	Sample Text	Sample Text

Opportunities

New

Opportunity Name	Related List Properties	Stage	Amount	Close Date
Sample Text		Sample Text	\$123.45	8/29/2023

Open Activities

New Task | New Event

Subject	Name	Task	Due Date	Status	Assigned To	Location	Related To
Sample Text	Sample Text	✓	8/29/2023 12:13 PM	Sample Text	Sarah Sample	Sample Text	Sample Text

- b. In the Button section, add the “Send Gift” custom button and click “OK”

Buttons

Standard Buttons:
Select standard buttons to display on the related list.

☒ New

Custom Buttons:
Select custom buttons to display on the related list. You can also reorder the selected actions.

Available Buttons

Selected Buttons
Send Gift

Add

Remove

Up

Down

OK

Cancel

Revert to Defaults

5: Add “Send Gift” button in the Account Contact list view

- a. In the Account Page Layout, scroll down to the related Contacts section and click on the wrench

Related Lists							
Related Contacts							
Contact Name	Related List Properties	Title	Direct	Email	Phone	Roles	Mailing City
Sarah Sample	Sample Text	Sample Text	✓	sarah.sample@company.com	1-415-555-1212	Sample Text	Sample Text

- b. In the Button section, add the “Send Gift” custom button and click “OK”

Buttons

Standard Buttons:

Select standard buttons to display on the related list.

☒ New

Custom Buttons:

Select custom buttons to display on the related list. You can also reorder the selected actions.

Available Buttons

Add

Remove

Selected Buttons

Send Gift

Up

Down

OK

Cancel

Revert to Defaults

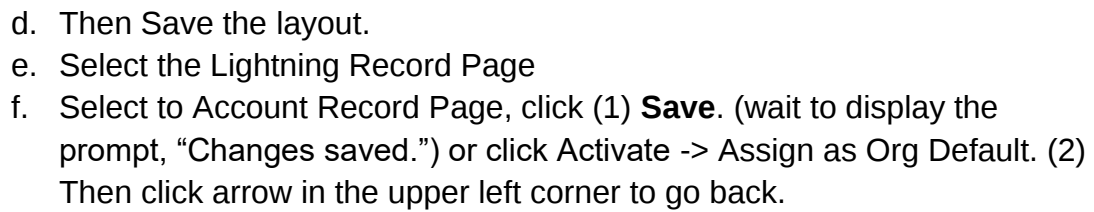
c. Then Save the Layout

6: Add “Send Gift” button in the Campaign page

- Select a Campaign -> click Setup (gear icon in upper-right corner) -> Edit Page
- To add the Send Gift button, select the page header (1) then click on the page layout with the label “previewed”. (2) In this example, Campaign layout.

The screenshot shows the Lightning App Builder interface for editing the 'Campaign Record Page'. On the left, the 'Components' panel lists various standard components. The main workspace displays the 'Campaign Record Page' layout, which includes a header section (1) and a main content area with 'Related' and 'Activity' sections. On the right, the 'Page' panel shows the 'Highlights Panel' and 'Assign Compact Layouts' section. In the 'Assign Compact Layouts' section, the 'Campaign Layout (previewed)' option is highlighted with a red box (2).

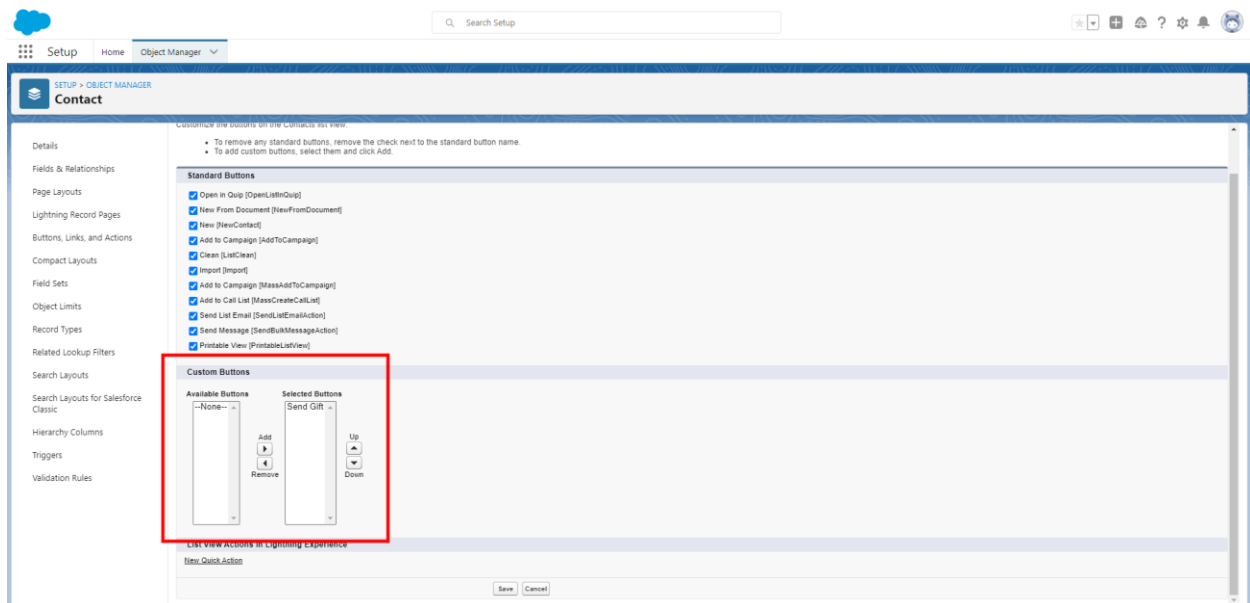
- Select the **Mobile & Lightning Actions** -> drag the “**Send Gift**” button into the **Salesforce Mobile and Lightning Experience Actions** section.



- Go to Setup (gear icon in upper-right corner) -> Object Manager -> search and go to the Contact (object)
- In left side bar, click on the Search Layouts for Salesforce Classic -> edit the List View Button Layout

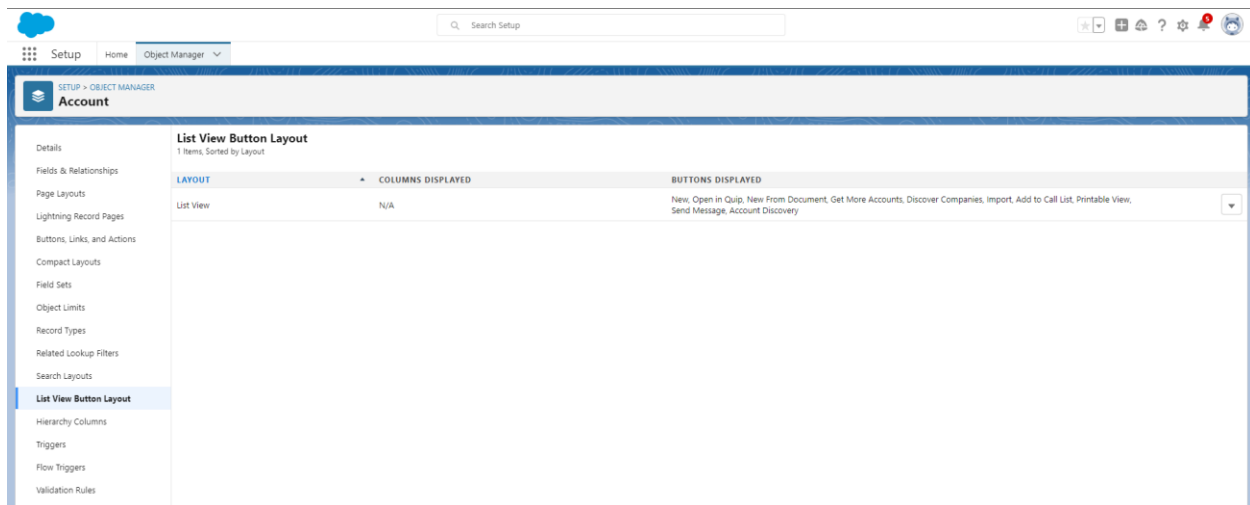


- c. Select the Send Gift from Available Buttons and add it to the Selected Buttons. Then Save.

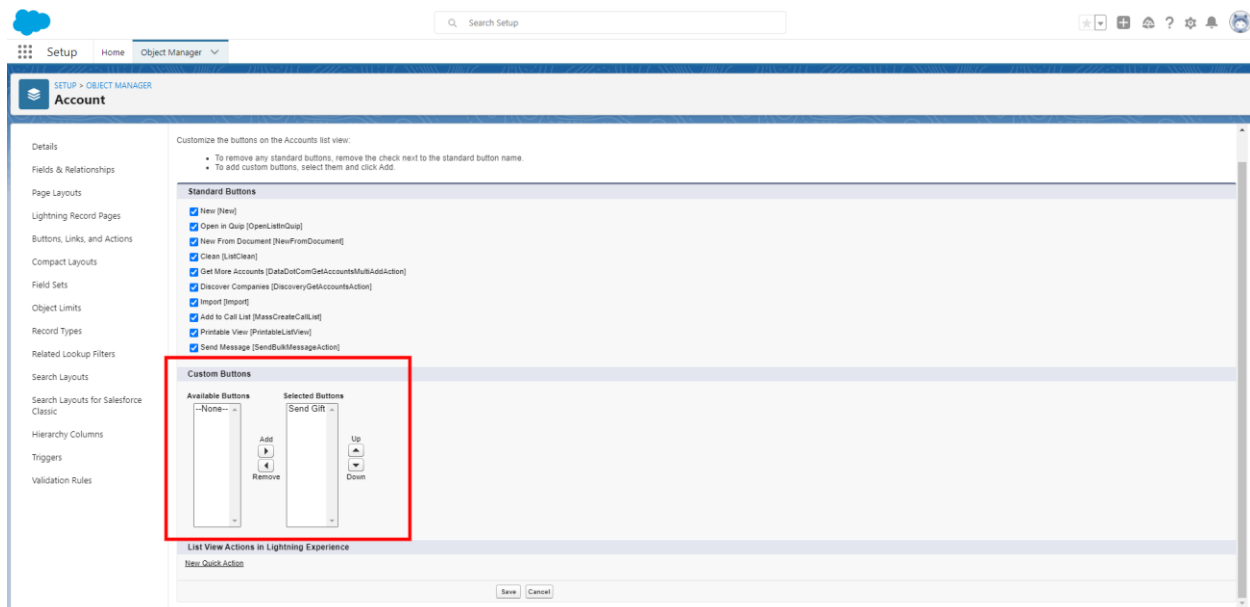


8: Add “Send Gift” button in the Account list view page

- Go to Setup (gear icon in upper-right corner) -> Object Manager -> search and go to the Account (object)
- In left side bar, click on the Search Layouts for Salesforce Classic -> edit the List View Button Layout

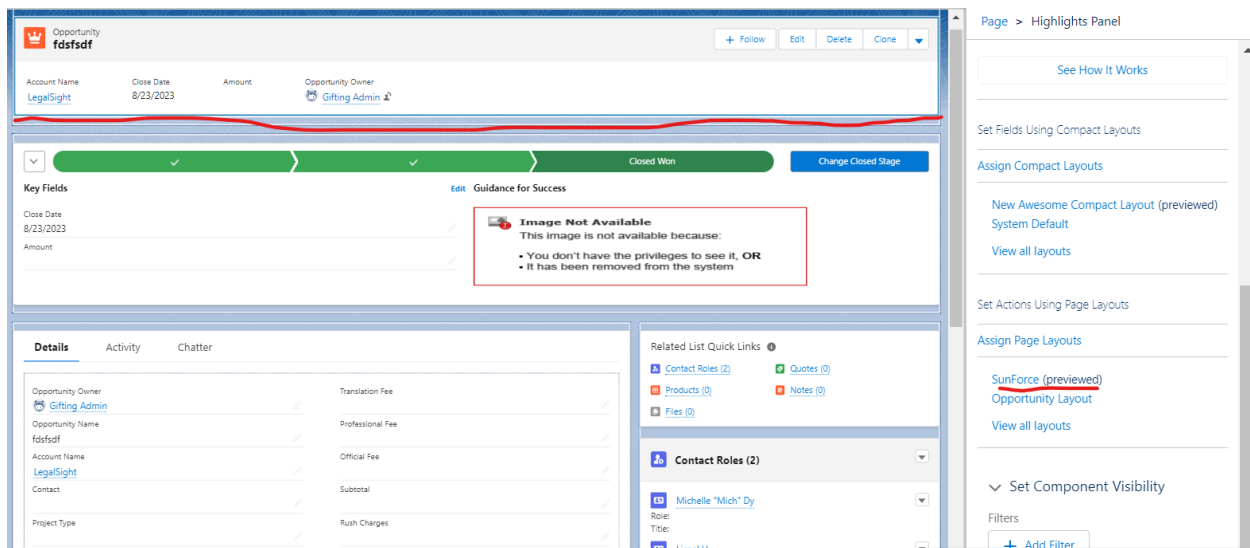


- c. Select the Send Gift from Available Buttons and add it to the Selected Buttons. Then Save.

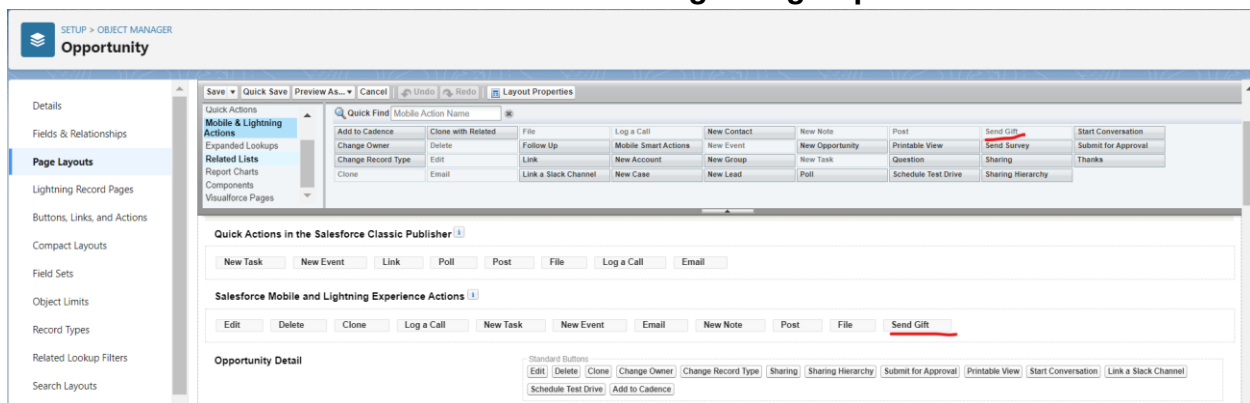


9: Add “Send Gift” button in the Opportunity page

- Select an Opportunity -> click Setup (gear icon in upper-right corner) -> Edit Page
- To add the Send Gift button, select the page header (1) then click on the page layout with the label “previewed”.



- c. Select the **Mobile & Lightning Actions** -> drag the **“Send Gift”** button into the **Salesforce Mobile and Lightning Experience Actions** section.



- d. Then Save the layout.
- e. Select Opportunity Record Page, click (1) **Save**. (wait to display the prompt, “Changes saved.”) or click Activate -> Assign as Org Default. (2) Then click arrow in the upper left corner to go back.

10: Add “Send Gift” button in the Opportunity list view page

- a. Go to Setup (gear icon in upper-right corner) -> Object Manager -> search and go to the Opportunity (object)
- b. In left side bar, click on the Search Layouts for Salesforce Classic -> edit the List View Button Layout
- c. Select the Send Gift from Available Buttons and add it to the Selected Buttons. Then Save.



Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Triggers

Edit Search Layout

Opportunities List View

Customize the buttons on the Opportunities list view.

- To remove any standard buttons, remove the check next to the standard button name.
- To add custom buttons, select them and click Add.

Standard Buttons

- ☒ Open in Quip [OpenListInQuip]
- ☒ New From Document [NewFromDocument]
- ☒ Import [Import]
- ☒ New [New]
- ☒ Pipeline Inspection [PipelineInspection]
- ☒ Printable View [PrintableListView]

Custom Buttons

Available Buttons

--None--

Add



Remove

Selected Buttons

Send Gift

Up



Down