

FlexiToast Configuration Guide

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Overview

The FlexiToast Application delivers customizable, context-aware notifications within Salesforce, incorporating dynamic data from record fields to enhance workflow efficiency. This native tool supports multiple notification types across various Salesforce interfaces, allowing administrators to create conditional alerts based on specific business criteria.

FlexiToast provides two key notification types: Dynamic Toast Alerts for instant pop-up messages and Dynamic Text Messages for persistent inline updates, with easy-to-configure options including permission sets and message duration. Plus, it fits right into Lightning Record Pages with dedicated components, making integration smooth and hassle-free.

Functionality

FlexiToast is a customizable notification system that seamlessly integrates with Salesforce Lightning Record Pages for easy and efficient communication. After installation, administrators first assign appropriate permission sets (FT Admin Permission for configuration access, FT User Permission and FT Guest User Permission for viewing alerts), then create notification configurations through the FlexiToast Application.

The core functionality revolves around two components:

1. **Dynamic Alert Configuration** - Administrators create configuration records specifying:
 - a. Alert type (Dynamic Toast Alert or Dynamic Text Message)
 - b. Target object
 - c. Message content with optional dynamic field values
 - d. For Toast Alerts: title, variant (Success/Error/Info/Warning), and persistence mode (Dismissible/Pester/Sticky)
2. **Component Implementation** - Once configured:
 - a. Administrators add either "FT Dynamic Toast Component" or "FT Static Toast Component" to Lightning Record Pages
 - b. For dynamic alerts, the component references the configuration record ID
 - c. Optional filter criteria can determine when notifications appear
 - d. The component renders in real-time when records are viewed, pulling current field values

This approach allows organizations to create contextual notifications that respond to record data and specific conditions without code customization.

The notifications are fully compatible with Sales Cloud, Service Cloud, and Experience Cloud interfaces.

Benefits

FlexiToast streamlines user communications within Salesforce, enhancing data visibility and process compliance while reducing the need for custom code development.

Key highlights

1. **Dynamic Data Inclusion:** Easily configure toast messages to include field values from records, ensuring messages are always relevant and actionable.
2. **Real-Time Notifications:** You can show toast alerts based on specific conditions.
3. **Multiple Notifications for a Single Object:** You can create multiple notifications on a single object and show them according to your business criteria when needed.
4. **Easy to Use:** This application is very easy to set up. You can go through our guide and easily set up this application in a few steps.
5. **Compatibility:** Fully supports Sales, Service, Experience, ensuring a seamless integration across all user interfaces.

Future scope

1. Dynamic field data integration from related records
2. Customizable date and datetime formatting options
3. Additional notification displays formats and positioning capabilities
4. And many more...

Dynamic Alert Configuration Types

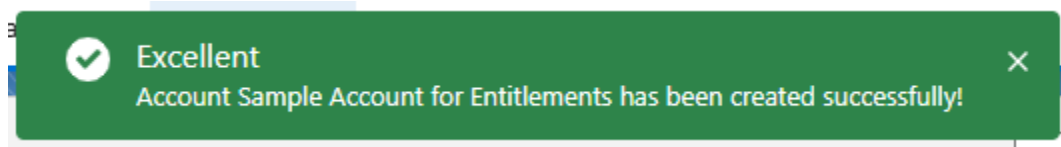
Each type uses a unique theme and icon to ensure users quickly recognize the alert's purpose.

Dynamic Toast Alert

It is a pop-up notification with dynamic fields that appears on a record page in Salesforce. It provides real-time feedback to users with a **title, message, theme, and icon**. The alert can be **temporary or persistent** based on the selected mode. It is commonly used to notify users about record updates, errors, warnings, or success messages.

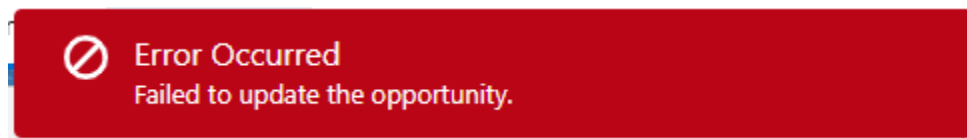
Success

1. Indicates that an action has been completed successfully.
2. **Example:**
 - a. Title – Excellent
 - b. Variant – Success
 - c. Mode – Dismissible
 - d. Message - Account {!record.Name} has been created successfully!



Error

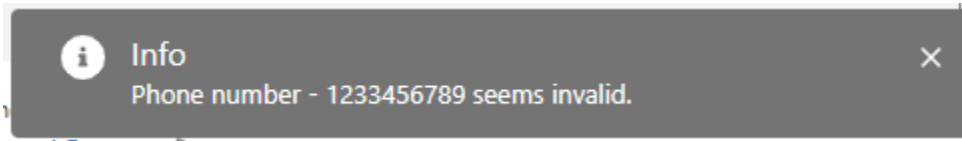
1. Alerts the user about a failure or issue that needs immediate attention.
2. **Example:**
 - a. Title – Error Occurred
 - b. Variant – Error
 - c. Mode – Pester
 - d. Message - Failed to update the opportunity.



Info

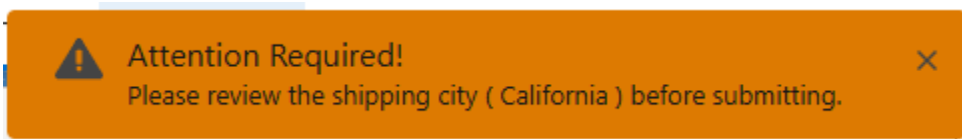
1. Provides general information to the user without indicating success or failure.
2. **Example:**
 - a. Title – Info
 - b. Variant – Info

- c. Mode – Sticky
- d. Message - Phone number - {!record.Phone} seems invalid.



Warning

1. Notifies users of a potential issue that may require their attention, but is not necessarily an error.
2. **Example:**
 - a. Title – Attention Required!
 - b. Variant – Warning
 - c. Mode - Dismissible
 - d. Message - Please review the shipping city ({!record.ShippingCity}) before submitting.



Dynamic Text Message

Scenario: A **Case record** needs to display a **warning message** if the **Case Priority is High** and **no support agent is assigned**.

Steps to Implement:

1. Create a Dynamic Text Message record.
2. Add the FT Dynamic Toast Component on the lightning record page of the case.
3. Add component visibility to display only when the case's priority is high, and an agent is not assigned

How It Works: Whenever a **Case record** is opened, this **inline message** will appear **if the Priority is "High" and no agent is assigned**.



Case

Urgent: High Priority Case Requires Immediate Attention

+ Follow

Edit

Delete

Change Owner

▼

Priority	Status	Case Number
High	New	00001003

High Priority Case - Please assign an agent immediately!

Check agent is not assigned, and priority is High.

Case Owner

High Priority Case Queue 

e

Priority

High



Additional Functionality

Static Toast Component

The **Static Toast Component** is a configurable Lightning component that allows admins to display toast notifications on Salesforce record pages without relying on dynamic alert configurations. Unlike dynamic alerts, which are controlled by **Dynamic Alert Configuration Records**, the static toast component is manually set up with predefined messages and settings.

When can we use it?

- When you need a **fixed notification** on a record page, irrespective of field values or conditions.
- To display **general information, warnings, or success messages** without needing dynamic configuration.
- In **Experience Cloud sites**, where users need **static** guidance or alerts.

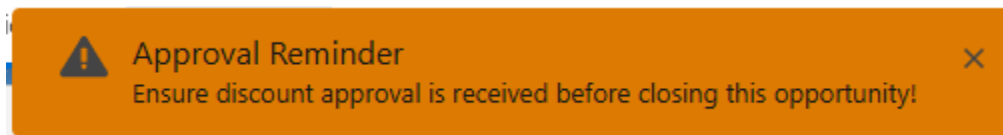
Example

Scenario: Your sales team needs a constant reminder on the **Opportunity Record Page** to verify discount approvals before closing deals.

Steps to Implement:

1. Open the Opportunity Lightning Record Page.
2. Search for "FT Static Toast Component" and drag it onto the page.
3. Set up the toast:
 - a. **Title:** Approval Reminder
 - b. **Variant:** Warning
 - c. **Mode:** Sticky (remains until dismissed)
 - d. **Message:** Ensure discount approval is received before closing this opportunity!
4. Additionally, you can also set this component's visibility too!
5. Save & activate.

How It Works: Every time a user opens an Opportunity, this warning will appear, **ensuring compliance**.



Installation Guide for FlexiToast Application

Installation from AppExchange: To install the FlexiToast Application, you can either download it from AppExchange or follow the steps below.

Installation via Package Install URL: Alternatively, you can copy and paste the package install URL directly into your web browser's address bar. If you are not already logged into your Salesforce org, you will be prompted to log in.

Sandbox URL:

<https://test.salesforce.com/packaging/installPackage.apexp?p0=04tdN000000C2E9>

Production URL:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tdN000000C2E9>

Configuration in Salesforce by Admin

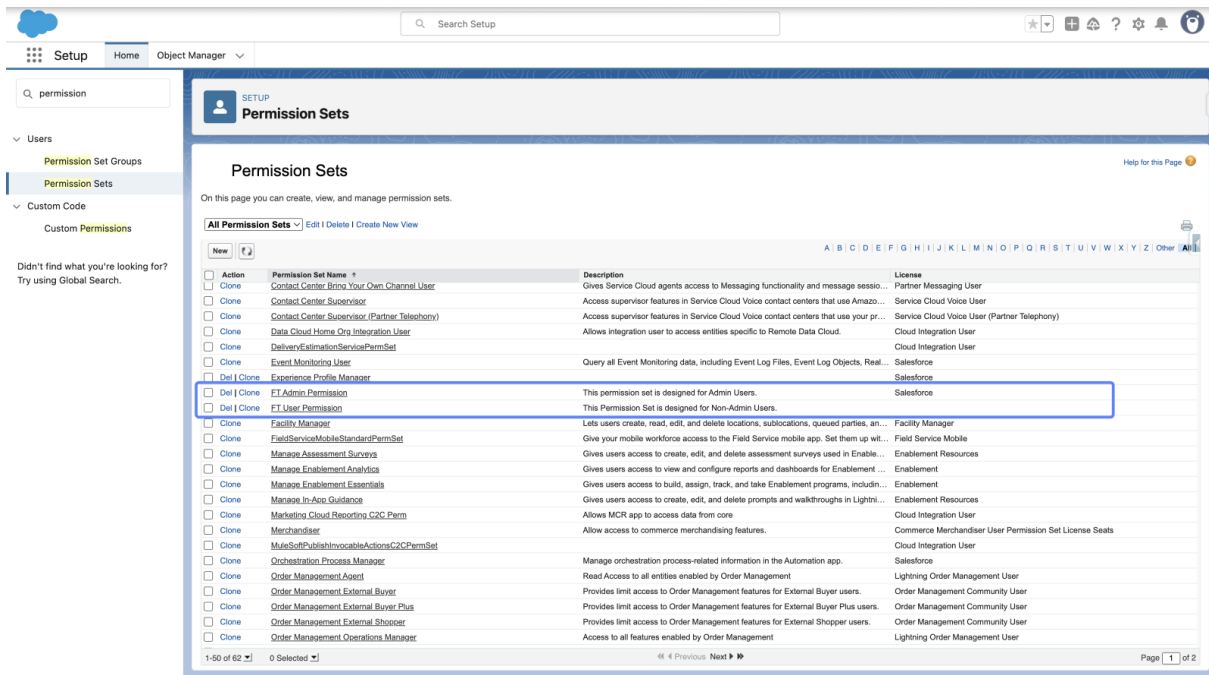
After successful installation, you will need to configure the FlexiToast Application. The package includes three essential permission sets:

FT Admin Permission: Assign this permission set to system administrator users. It grants them the necessary permissions to create, view, edit, or delete Dynamic Alert settings.

Ensure that you correctly assign these permission sets to the relevant users in your Salesforce org to ensure the smooth operation of the FlexiToast Application.

Assigning Permission Sets:

- Navigate to Setup and search for **Permission Sets**, then open it. Click on **FT Admin Permission**.



The screenshot shows the Salesforce Setup interface. On the left sidebar, the navigation menu includes Setup, Home, and Object Manager. The 'Setup' link is selected. Below the sidebar, there's a search bar with 'permission' entered. The main content area is titled 'Permission Sets' and contains a table of available permission sets. The 'FT Admin Permission' set is highlighted with a red box. Below the table, there are buttons for 'New', 'Clone', and 'Delete'. The table has columns for Action, Permission Set Name, Description, and License.

Action	Permission Set Name	Description	License
☐	Contact Center Bring Your Own Channel User	Gives Service Cloud agents access to Messaging functionality and message sessions.	Partner Messaging User
☐	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that use Amazon Connect.	Service Cloud Voice User
☐	Contact Center Supervisor (Partner Telephony)	Access supervisor features in Service Cloud Voice contact centers that use your private branch exchange (PBX).	Service Cloud Voice User (Partner Telephony)
☐	Data Cloud Home Org Integration User	Allows integration user to access entities specific to Remote Data Cloud.	Cloud Integration User
☐	DeliveryEstimateForServicePermsSet		Cloud Integration User
☐	Event Monitoring User	Query all Event Monitoring data, including Event Log Files, Event Log Objects, Real-time Event Log Objects, and Event Log Objects.	Salesforce
☐	Experience Profile Manager		Salesforce
☐	FT Admin Permission	This permission set is designed for Admin Users.	Salesforce
☐	FT User Permission	This Permission Set is designed for Non-Admin Users.	Salesforce
☐	Facility Manager	Lets users create, read, edit, and delete locations, sublocations, queued parties, and other information.	Facility Manager
☐	FieldServiceMobileStandardPermSet	Gives your mobile workforce access to the Field Service mobile app. Set them up with the app.	Field Service Mobile
☐	Manage Assessment Surveys	Gives users access to create, edit, and delete assessment surveys used in Enablement.	Enablement Resources
☐	Manage Enablement Analytics	Gives users access to view and configure reports and dashboards for Enablement.	Enablement
☐	Manage Enablement Essentials	Gives users access to build, assign, track, and take Enablement programs, including surveys.	Enablement
☐	Manage In-App Guidance	Gives users access to create, edit, and delete prompts and walkthroughs in Lightning.	Enablement Resources
☐	Marketing Cloud Reporting C2C Perm	Allows MCR app to access data from core.	Cloud Integration User
☐	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seats
☐	MuleSoftPublishInvocableActionsC2CPermSet		Cloud Integration User
☐	Orchestration Process Manager	Manage orchestration process-related information in the Automation app.	Salesforce
☐	Order Management Agent	Read Access to all entities enabled by Order Management.	Lightning Order Management User
☐	Order Management External Buyer	Provides limit access to Order Management features for External Buyer users.	Order Management Community User
☐	Order Management External Buyer Plus	Provides limit access to Order Management features for External Buyer Plus users.	Order Management Community User
☐	Order Management External Shopper	Provides limit access to Order Management features for External Shopper users.	Order Management Community User
☐	Order Management Operations Manager	Access to all features enabled by Order Management.	Lightning Order Management User

- Click on the **Manage Assignments** button and then select **Add Assignments**.

Permission Set
FT Admin Permission Video Tutorial | Help for this Page

Find Settings... | Clone | Edit Properties | **Manage Assignments** | View Summary

Permission Set Overview

Description	This permission set is designed for Admin Users.		
License	Salesforce	API Name	FT_Admin_Permission
Session Activation Required	☐	Namespace Prefix	est
Permission Set Groups Added To	0	Created By	Ayush Saxena, 17/02/2025, 3:52 pm
		Last Modified By	Ayush Saxena, 19/02/2025, 7:34 pm

Apps

Assigned Apps
Settings that specify which apps are visible in the app menu

Assigned Connected Apps
Settings that specify which connected apps are visible in the app menu

Object Settings
Permissions to access objects and fields, and settings such as tab availability

App Permissions
Permissions to perform app-specific actions, such as "Manage Call Centers"

Apex Class Access
Permissions to execute Apex classes

Visualforce Page Access
Permissions to execute Visualforce pages

External Data Source Access
Permissions to authenticate against external data sources

Flow Access
Permissions to execute Flows

Named Credential Access
Permissions to authenticate against named credentials

External Credential Principal Access
Permissions to authenticate with external credential principal mappings

Custom Permissions
Permissions to access custom processes and apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on the Lightning Platform
[Learn More](#)

... > SETUP > PERMISSION SET 'FT ADMIN PERMISSION'

FT Admin Permission

Current Assignments ✎ 🗑️ Add Assignment



No assignments defined.

- Choose the admin users to whom you want to assign these permissions, then click **Next**, and finally, click **Assign** and **Done**.



... > PERMISSION SET 'FT ADMIN PERMISSION' > MANAGE ASSIGNMENT EXPIRATION
FT Admin Permission

Select Users to Assign



All Users ▾

1 item selected

Q Search this list...



☐	Full Name ↑	Alias	Username	Role	Active	Profile
☒	Ayush Saxena	ASaxe	ayush.saxena@exprosoftech.com.dev		☒	System Administrator
☐	Chatter Expert	Chatter	chatty.00ddm00000hmcquab.blditymkr8n2@chatter.salesforce.com		☒	Chatter Free User
☐	Integration User	integ	integration@00ddm00000hmcquab.com		☒	Analytics Cloud Integration User
☐	Security User	sec	insightssecurity@00ddm00000hmcquab.com		☒	Analytics Cloud Security User

Cancel

Next



... > PERMISSION SET 'FT ADMIN PERMISSION' > MANAGE ASSIGNMENT EXPIRATION
FT Admin Permission

Select an Expiration Option For Assigned Users

☒ No expiration date ⓘ

☐ Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

ⓘ Time Zone

Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
Ayush Saxena		System Administrator	✓	Salesforce	Never Expires

Cancel

Back

Assign

 ... > PERMISSION SET 'FT ADMIN PERMISSION' > MANAGE ASSIGNMENTS

FT Admin Permission

Assignment Summary

Full Name	User License	Expires On	Time Zone	Status
Ayush Saxena	Salesforce			 Success

Done

FT User Permission: This permission set is intended for other users who need access to read Dynamic Alert Config details. Assign this permission set to all users other than Admin and guest users so that they will not get any access issues.

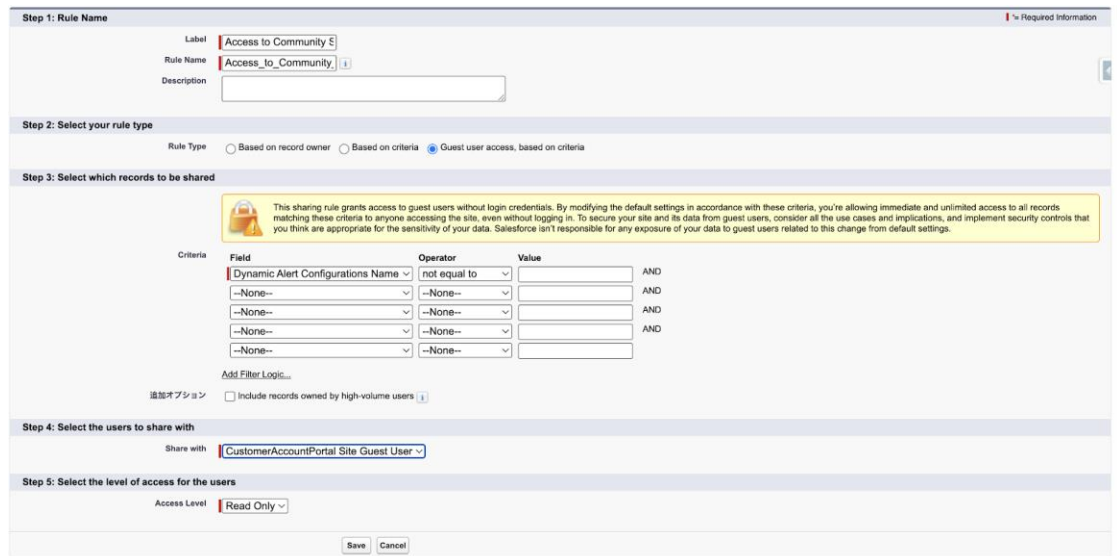
- Go back to **Permission Sets** and open **FT User Permission**.
- Click on **Manage Assignment** and then select **Add Assignment**.
- Choose **active users** (Community Users as well) other than Admin & Guest Site users, then click **Next**, followed by **Assign** and **Done**.

FT Guest User Permission: This permission set is intended for community site guest users only.

- Go to Permission Sets and open FT Guest User Permission and assign it to Guest Site Users.
- Guest users are created automatically when you create a new site.
- You will check Guest Username as **Site Name + 'Site Guest user'**.

Create Sharing Rule for Guest user:

- You need to create a new sharing rule on the Dynamic Alert Configuration Object to give access to site guest users.
- To create it, go to Setup > Sharing Settings > Dynamic Alert Configuration Sharing Rules, then create a new Sharing Rule as shown below:



The screenshot shows the 'Step 1: Rule Name' configuration screen. The 'Label' is 'Access to Community', the 'Rule Name' is 'Access_to_Community', and the 'Description' is empty. Below this, 'Step 2: Select your rule type' shows 'Guest user access, based on criteria' selected. 'Step 3: Select which records to be shared' includes a warning about granting access to guest users without login credentials. It features a table with columns 'Field', 'Operator', and 'Value'. The first row has 'Dynamic Alert Configurations Name', 'not equal to', and an empty value field. Below this are four rows with 'None' in the 'Field' column. 'Step 4: Select the users to share with' shows 'CustomerAccountPortal Site Guest User' selected. 'Step 5: Select the level of access for the users' shows 'Read Only' selected. At the bottom are 'Save' and 'Cancel' buttons.

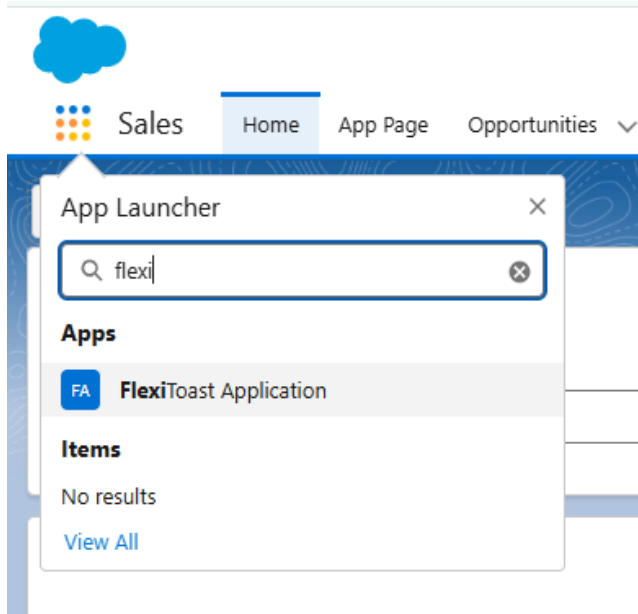
Field	Operator	Value	
Dynamic Alert Configurations Name	not equal to		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

- You need to share this sharing rule with a Guest user named **Site Name + 'Site Guest user'**.

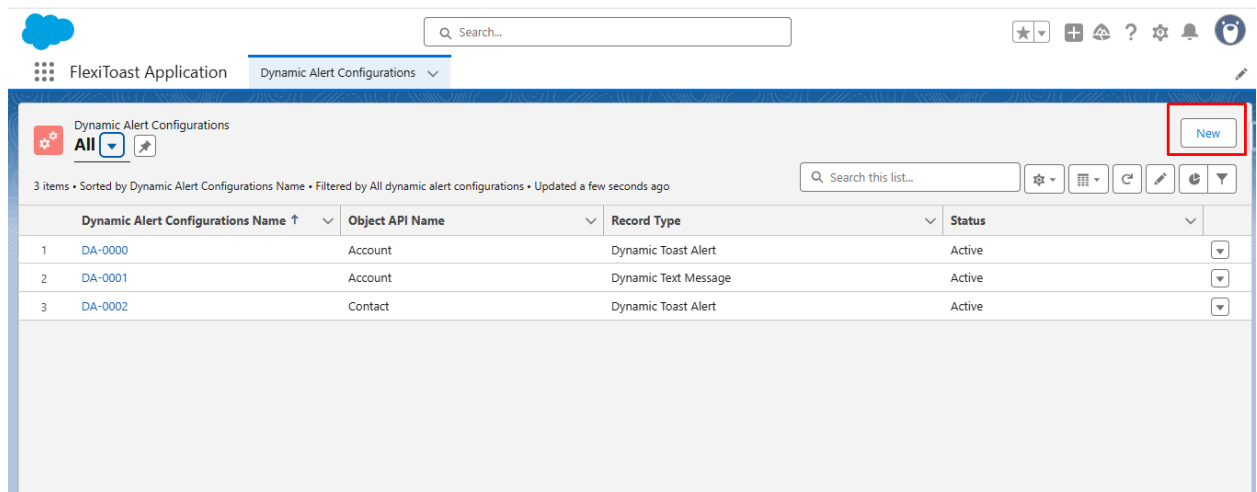
Steps to create Dynamic Alert Config record

Dynamic Toast Alert Record

- A default app named **FlexiToast Application** has been included in the managed package, which can be utilized to easily create a Dynamic Alert Configuration Record.
- From App Launcher, search for **FlexiToast Application** and open the app.



- You'll land on the Dynamic Alert Configurations Tab. Click the "New" button to initiate the creation of a new record.



- Select Alert Type (Toast Alert).
- Select the **object** for which you want to use this alert and then click **Next**.

New Dynamic Alert Configuration

*Select Alert Type: Dynamic Toast Alert

*Select Object: Account

Cancel Next

- Proceed to fill out the information as given below:
 - **Toast Title:** The title of the toast, displayed as a heading.
 - **Toast Variant:** The theme and icon displayed on the toast.
 - Success - A green box with a checkmark icon.
 - Error - A red box with an error icon.
 - Info - A gray box with an info icon.
 - Warning - A yellow box with a warning icon.
 - **Toast Mode:** Determines how persistent the toast is.
 - Dismissible - Remains visible until the user clicks the close button or 3 seconds have elapsed, whichever comes first.
 - Pester - Remains visible for 3 seconds
 - Sticky - Remains visible until the user clicks the close button.
 - **Toast Message:**
 - Please enter a message to display on the record of the selected object.
 - You can also add merge fields into the message.
- Click **Save & Activate**.

Selected Object: Account

Selected Component Type: Dynamic Toast Alert

Enter Toast Title: Attention Required!

Select Toast Variant: Warning - A yellow box with a warning icon.

Select Toast Mode: Dismissible - Remains visible until the user clicks the close button or 3 seconds has elapsed, whichever...

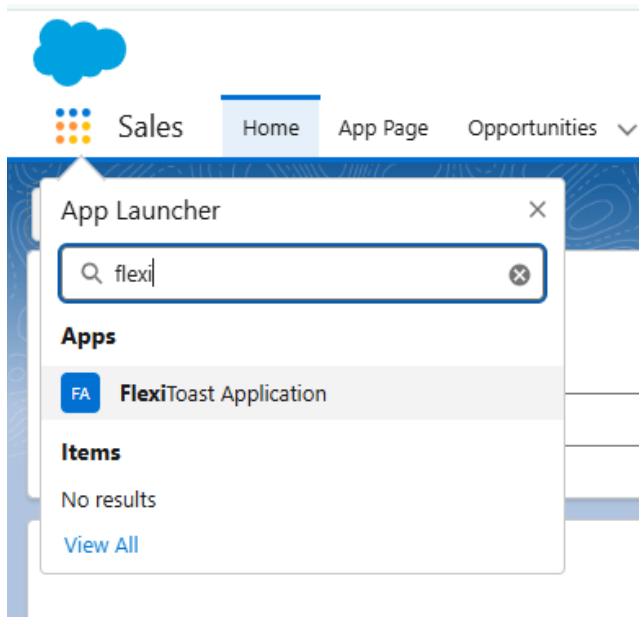
Add Merge Field to Message

Enter Toast Message: Please review the shipping city ({!record.ShippingCity}) before submitting.

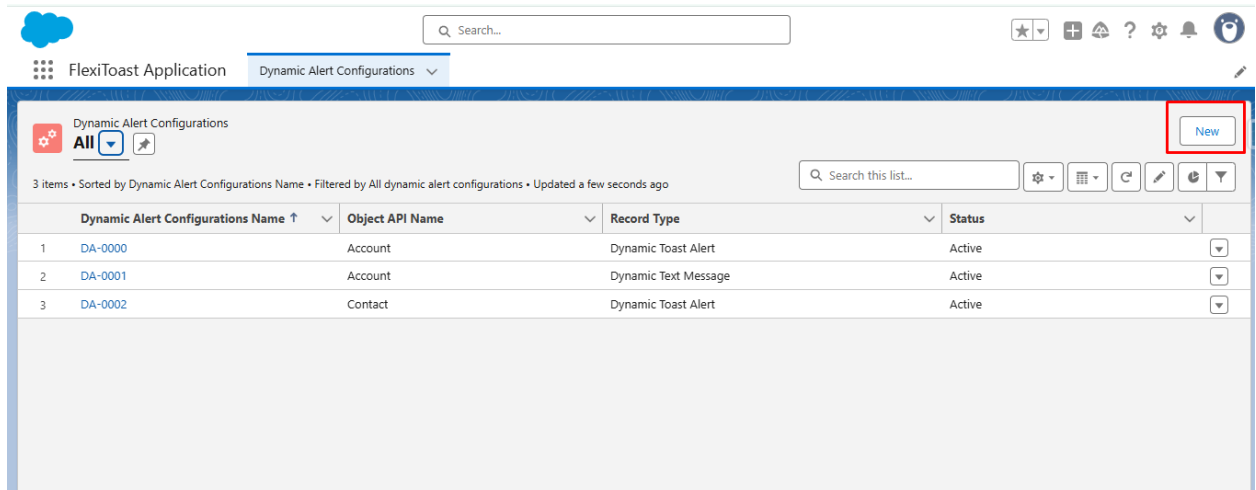
Cancel Previous Save as Draft Save & Activate

Dynamic Text Message Record

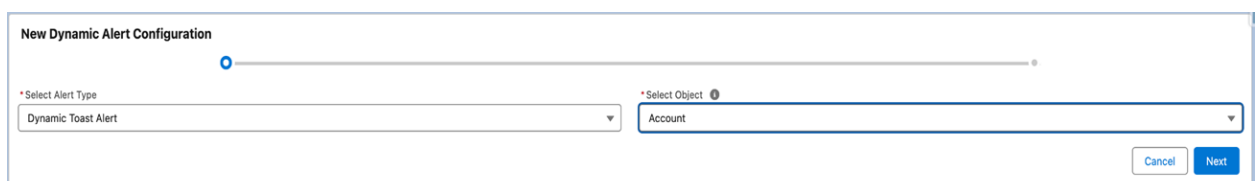
- From App Launcher, search for **FlexiToast Application** and open the app.



- You'll land on the Dynamic Alert Configurations Tab. Click the "New" button to initiate the creation of a new record.

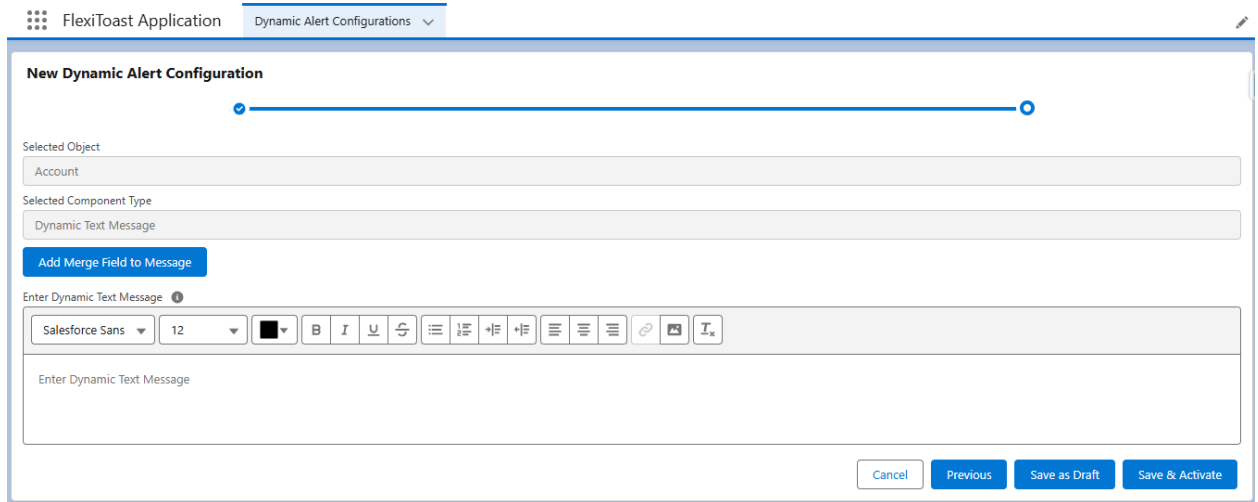


- Select Alert Type (Dynamic Text Message).
- Select the **object** for which you want to use this message and then click **Next**.



The screenshot shows the 'New Dynamic Alert Configuration' form. It has two dropdown menus: 'Select Alert Type' and 'Select Object'. The 'Select Alert Type' dropdown is set to 'Dynamic Toast Alert'. The 'Select Object' dropdown is set to 'Account'. There are 'Cancel' and 'Next' buttons at the bottom right.

- Please enter a dynamic text message to display on the record of the selected object.
- You can also add merge fields into the message.



The screenshot shows the 'New Dynamic Alert Configuration' form within the 'FlexiToast Application' interface. The form is titled 'New Dynamic Alert Configuration' and has a progress bar at the top. It contains the following fields and controls:

- Selected Object:** A dropdown menu with 'Account' selected.
- Selected Component Type:** A dropdown menu with 'Dynamic Text Message' selected.
- Add Merge Field to Message:** A blue button.
- Enter Dynamic Text Message:** A section with a font selector (Salesforce Sans), a size selector (12), a color selector (black), and a rich text editor toolbar with icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, and insert image. Below the toolbar is a large text area for entering the dynamic text message.
- Buttons:** 'Cancel', 'Previous', 'Save as Draft', and 'Save & Activate' at the bottom right.

- Click **Save & Activate**.

How to use the Dynamic Alert Config Record

- Before using the Dynamic Alert, check the Status of the Dynamic Alert Configuration record. If the Status is not Active, edit the record and make it **Active** to use it.

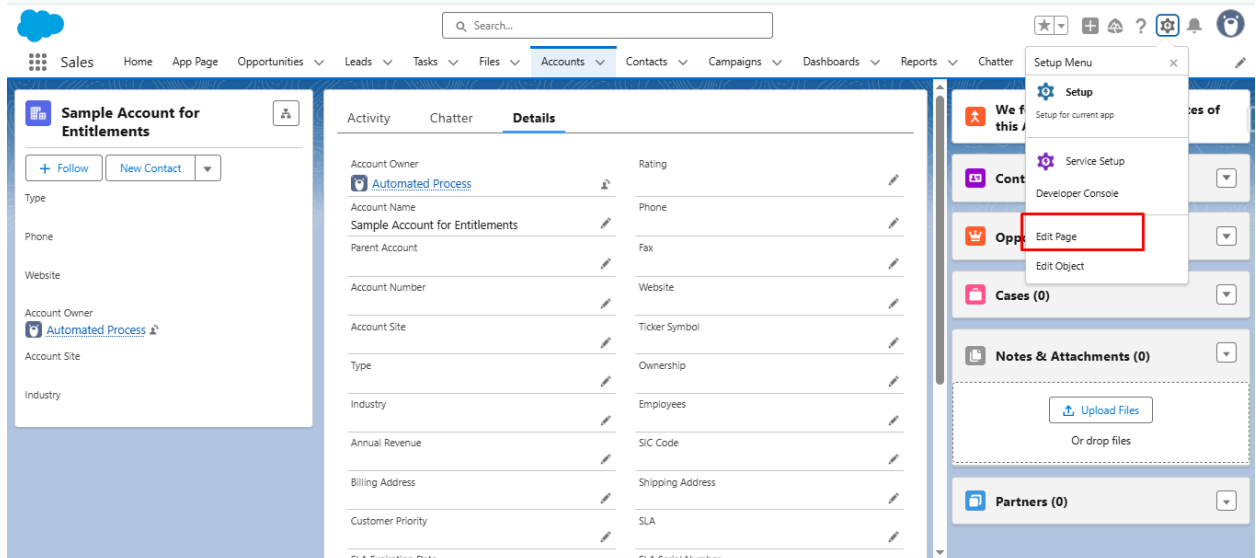
- To use this Dynamic Alert, copy the Id of the Dynamic Alert Configuration from the URL.

The screenshot displays the 'Dynamic Alert Configurations' page in the Lightning Force interface. The configuration 'DA-0003' is selected. The 'Details' section shows the following information:

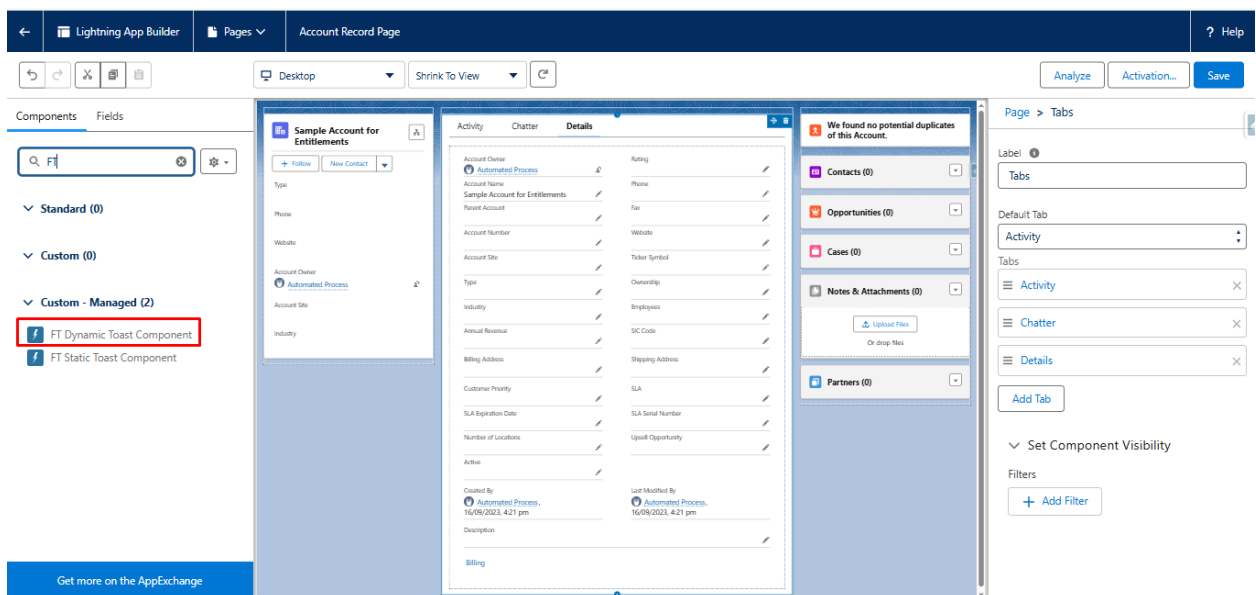
- Dynamic Alert Configurations Name:** DA-0003
- Owner:** Harsh Patel
- Object API Name:** Account
- Status:** Active (highlighted with a red box)
- Dynamic Text Message:** Success - A green box with a checkmark icon.
- Created By:** Harsh Patel, 23/04/2025, 4:56 pm
- Last Modified By:** Harsh Patel, 23/04/2025, 4:56 pm

The URL bar at the top shows the configuration ID 'a00j200000ARTcwlAH' highlighted with a red box.

- To set up Lightning Record Page, we will go through the Account Lightning Record Page. Go to Account Lightning Record Page, select the edit page from the top right setup (Gear Icon).

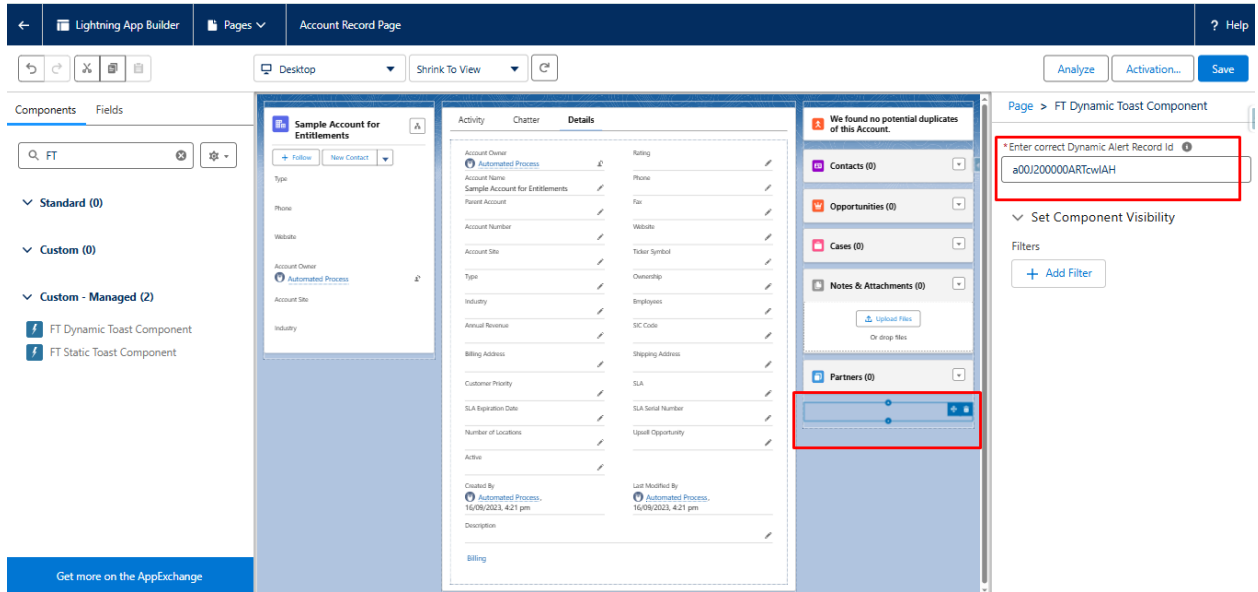


- In the Component search box, enter FT to search for a custom component.
- In the Custom Component Section, you will have this component.



- Drag the FT Dynamic Toast **Component** to the Lightning Record Page.

- Enter the Id of the Dynamic Alert Configuration record into the **Enter Dynamic Alert Record Id** (Whether it is Dynamic Text Message or Dynamic Toast Alert) input.

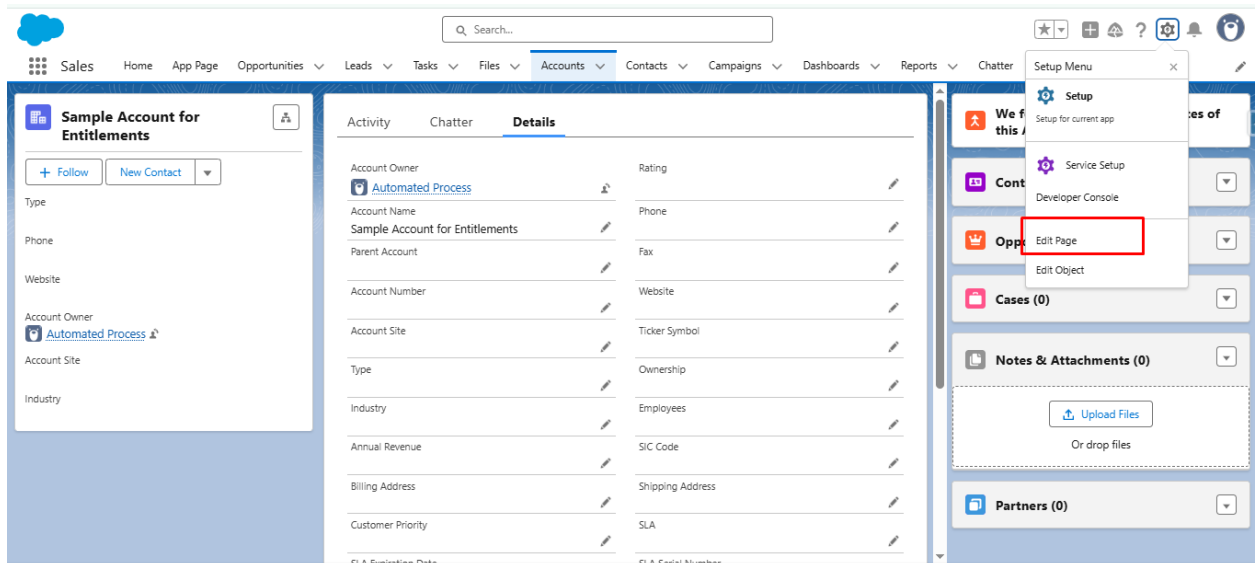


- Save the Lightning Record Page and Move Back.
- You have completed all the steps for Dynamic Alert.
- Additionally, you can use the add filter option on the component to show it based on specific criteria.

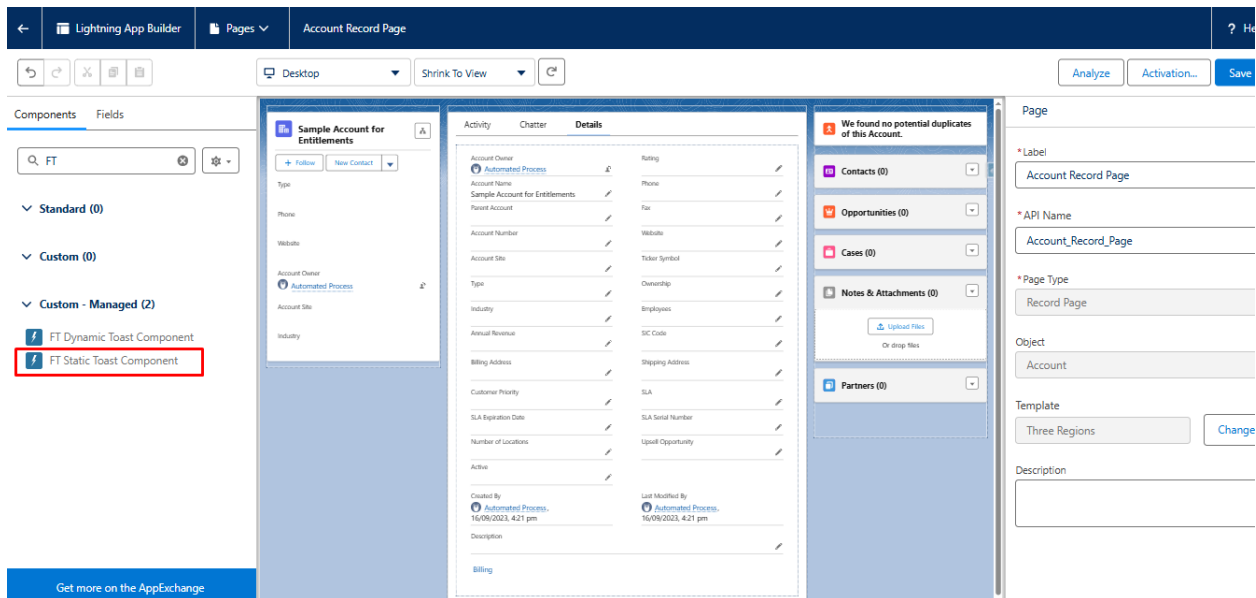
Note: We can use this component in the Experience Cloud site as we are using it in Salesforce.

Steps to use static toast component

- To set up the Lightning Record Page, we will go through the Account Lightning Record Page. Go to Account Lightning Record Page, select the edit page from the top right setup (Gear Icon).

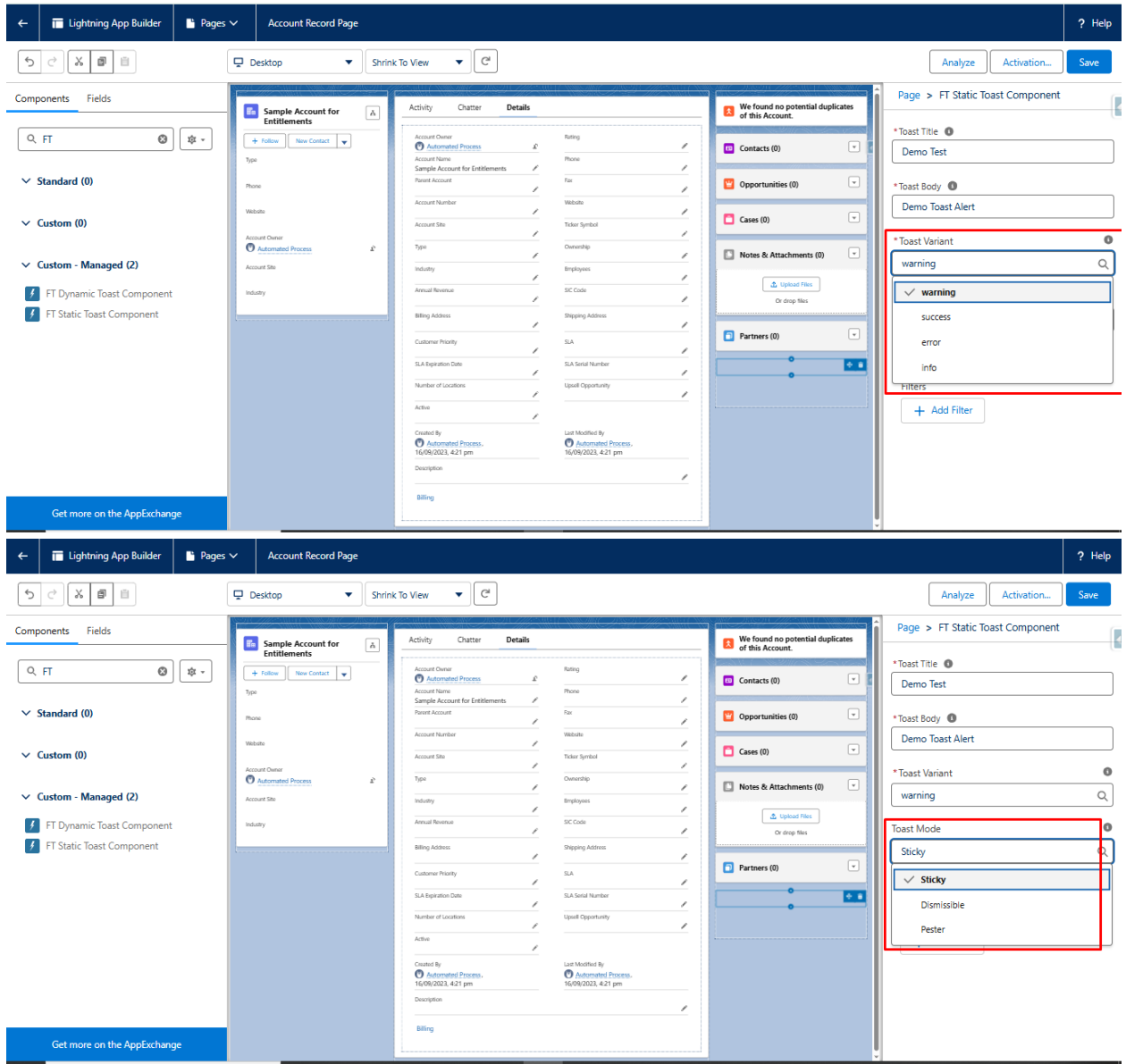


- In the Component search box, enter **FT Static Toast Component**.



- Drag the **FT Static Toast Component** to the Lightning Record Page.
- Proceed to fill out the information as given below:
 - **Toast Title:** The title of the toast, displayed as a heading.
 - **Toast Variant:** The theme and icon displayed on the toast.
 - **Toast Mode:** Determines how persistent the toast is.

- **Toast Message:** Please enter a message to display on the record of the selected object.



The screenshot displays the Lightning App Builder interface for configuring a Static Toast Component. The interface is divided into three main sections: Components, Fields, and the main record view.

Components Section:

- Standard (0):** No standard components are listed.
- Custom (0):** No custom components are listed.
- Custom - Managed (2):**
 - FT Dynamic Toast Component
 - FT Static Toast Component

Fields Section:

- Search: FT
- Buttons: + Follow, New Contact
- Fields: Type, Phone, Website, Account Owner, Account Site, Industry

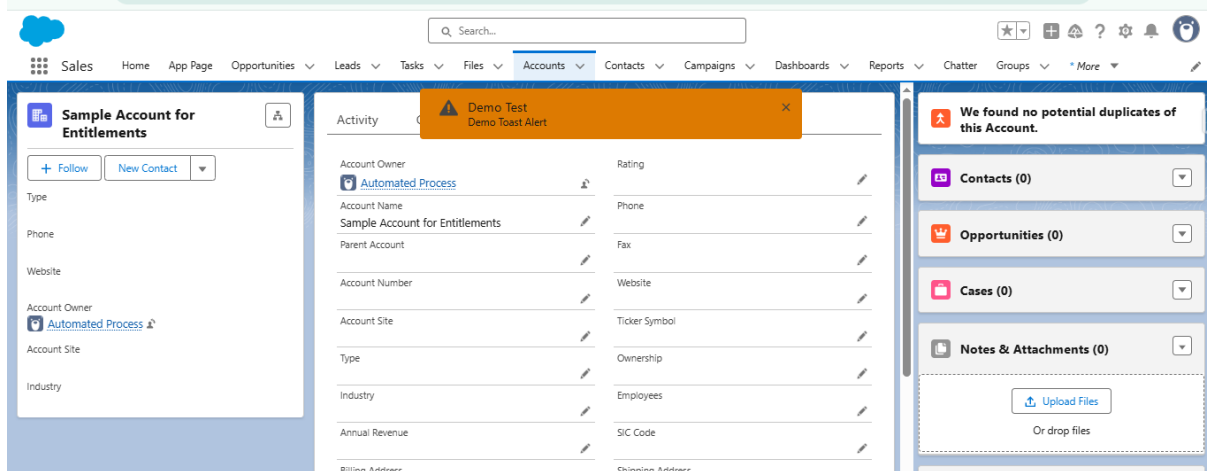
Main Record View:

- Activity:** Automated Process
- Chatter:** Automated Process
- Details:**
 - Account Owner: Automated Process
 - Account Name: Sample Account for Entitlements
 - Parent Account: Sample Account for Entitlements
 - Account Number: [Field]
 - Account Site: [Field]
 - Type: [Field]
 - Industry: [Field]
 - Annual Revenue: [Field]
 - Billing Address: [Field]
 - Customer Priority: [Field]
 - SLA Expiration Date: [Field]
 - Number of Locations: [Field]
 - Active: [Field]
 - Created By: Automated Process
 - Last Modified By: Automated Process
 - Description: [Field]
 - Billing: [Field]

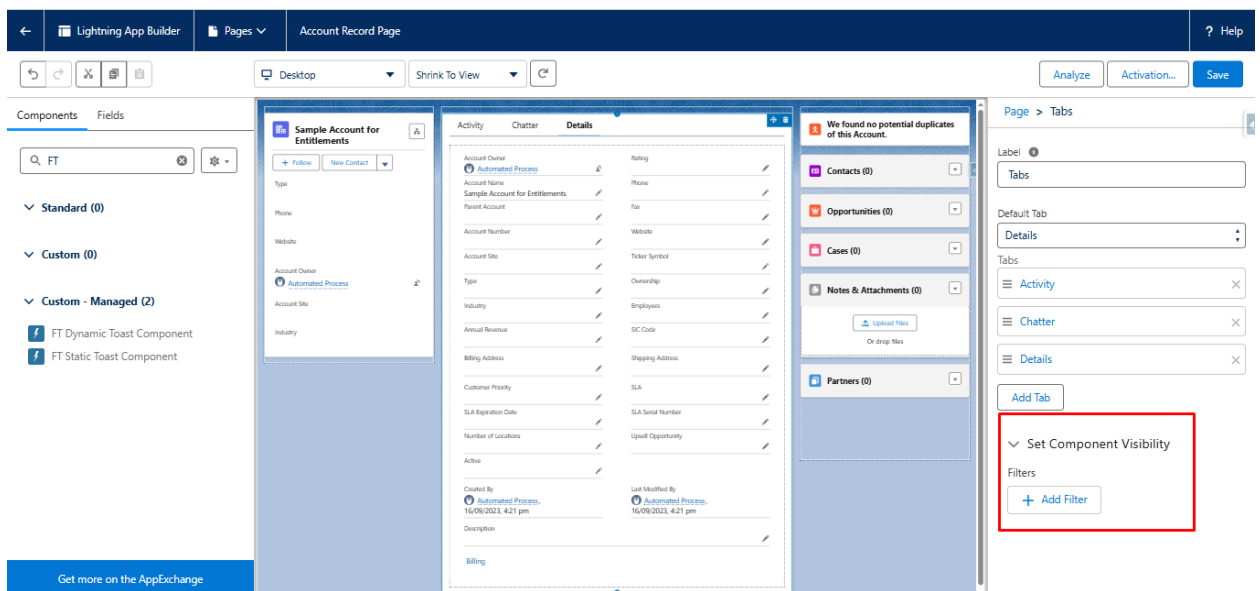
Right Sidebar (Static Toast Component Configuration):

- Toast Title:** Demo Test
- Toast Body:** Demo Toast Alert
- Toast Variant:**
 - warning
 - success
 - error
 - info
- Toast Mode:**
 - Sticky
 - Dismissible
 - Pester

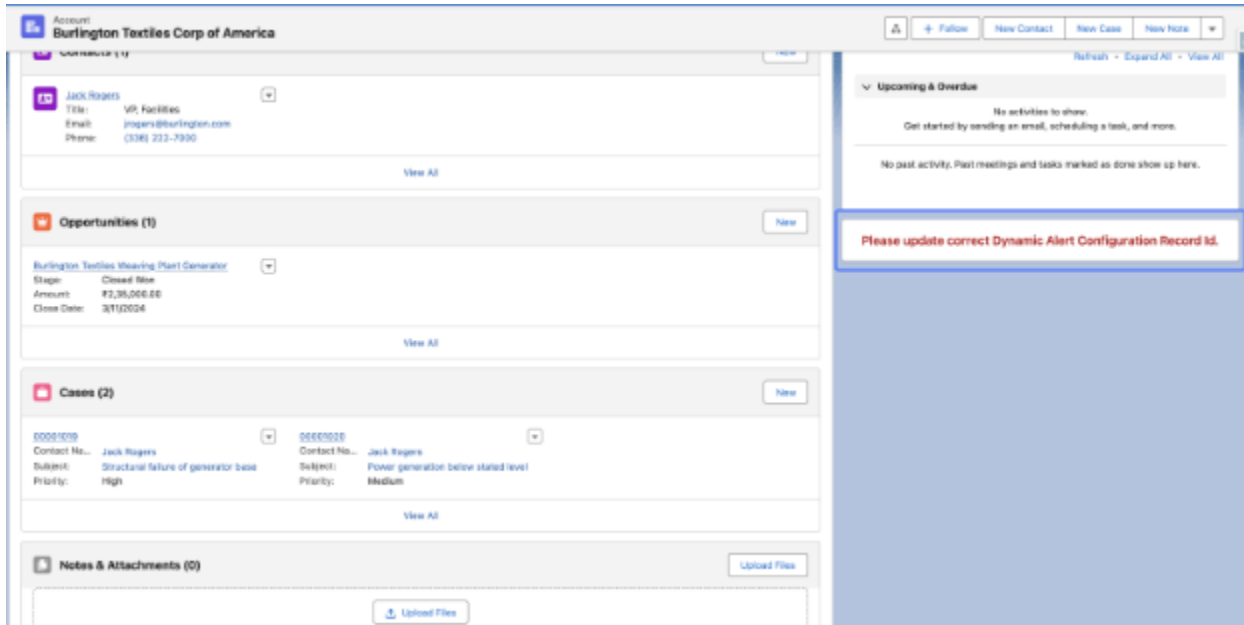
- Save the Lightning Record Page and Move Back.



- You can also add specific criteria when you want to show this toast alert. You can use the add filter option on the component to show it based on specific criteria. (Same way we can do this for FT Dynamic Toast Component as well)



NOTE: If the user doesn't have access to the Dynamic Alert Configuration record or the record is deleted, then Admin user will only be able to see an error message like below:



The screenshot displays a Salesforce account page for "Burlington Textiles Corp of America". The page is divided into several sections:

- Contact Information:** Jack Rogers, VP, Facilities. Email: jrogers@burlington.com, Phone: (336) 233-7990.
- Opportunities (1):** Burlington Textiles Weaving Plant Generator. Stage: Closed Won, Amount: \$2,35,000.00, Close Date: 3/11/2024.
- Cases (2):** Two cases are listed. The first case, ID 00001009, is titled "Structural failure of generator base" with a high priority. The second case, ID 00001010, is titled "Power generation below stated level" with a medium priority.
- Notes & Attachments (0):** No notes or attachments are currently visible.

On the right side of the page, there is a "Upcoming & Overdue" section with a message: "No activities to show. Get started by sending an email, scheduling a task, and more." Below this, a red alert banner is displayed with the text: "Please update correct Dynamic Alert Configuration Record id."

Conclusion

The FlexiToast Application enhances Salesforce usability by providing real-time notifications through dynamic toast alerts and dynamic text messages. Admins can configure Static Toast Components for fixed notifications, while Dynamic Alerts offer context-aware messages based on data.

The ability to include dynamic fields, apply filters, and support Experience Cloud ensures flexibility and efficiency in user communication. Proper setup and permission assignments guarantee seamless functionality, making it a valuable tool for improving workflow visibility.