

“MY FAVORITES” APP FOR SALESFORCE

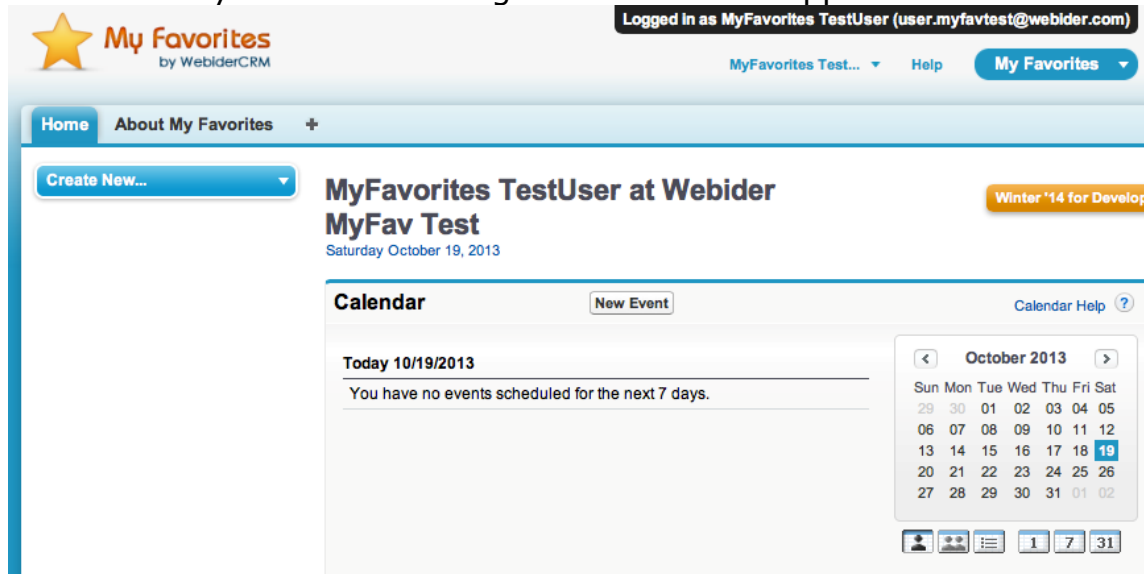
F.A.Q.s

Q1: My User do not see 'My Favorites' Tab or have access to the app functionality?	2
Q2: Why nothing shows up under 'About My Favorites' Tab?	13
Q3: Why Submit for Approval Button shows up on Detail page ?	17
Q4: How to Change the total number of URLs per page in widget & Hide Support icon from widget and Getting Stared page ?	18
Q5: How to Clone the folder with favorites & show the clone (w/favorites) button on Folder object Detail page ?	18
Q6: How to share the folder with favorites & show the Share (w/favorites) button on Folder object Detail page ?	19

Following are the common questions and their answers

Q1: My User do not see 'My Favorites' Tab or have access to the app functionality?

When the end user logs in, he or she doesn't see 'My Favorites' tab and only see 'About My Favorites' tab. They don't seem to get access to this app.

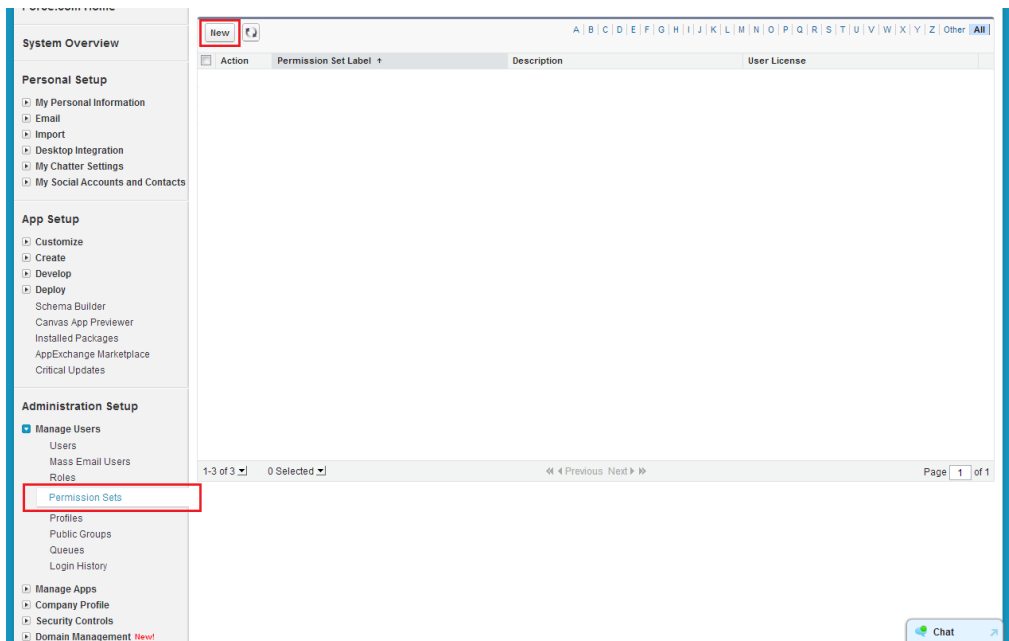


A1: Create a new permission set for 'My Favorites' app and assign to user

Following are the steps you can take to create a new permission set and assign it to the selected users who should have access to 'My Favorites' app.

Step 1 :

- Goto setup > Manager user > Permission Sets > Click New button to create a new permission sets for users



- Enter the required information to create the permission set

Step2

- Click on 'Assigned Apps' under Apps section of Permission Set and follow the screen to give the access of the app.

The first screenshot shows the 'Permission Set My Favorites' configuration page. The 'Assigned Apps' tab is selected, and a red box highlights the 'Assigned Apps' table header, which includes columns for 'App Name' and 'Installed Package'. An 'Edit' button is visible next to the header.

The second screenshot shows the 'Assigned Apps' configuration page with the 'Available Apps' list on the left and the 'Enabled Apps' list on the right. The 'Available Apps' list includes: Call Center, Community, Content, Force.com, Marketing, Platform, Sales, Salesforce Chatter, Sample Console, and Site.com. The 'Enabled Apps' list contains 'webider_myfav.My Favorites', which is highlighted with a red box. A 'Save' button is visible above the 'Enabled Apps' list.

Step3

- Click on 'Object Settings' under Apps section of Permission Set

Permission Set: My Favorites

Find Settings... | Clone | Delete | Edit Properties

Permission Set Overview

Description: My_Favorites
API Name: MyReq
User License: faisal.bahadur
Namespace Prefix: faisal.bahadur
Created By: faisal.bahadur, 10/11/2013 10:25 PM
Last Modified By: faisal.bahadur, 10/11/2013 10:25 PM

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com
[Learn More](#)

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

System

Settings that apply across all apps, such as record and user management
[Learn More](#)

System Permissions
Permissions to perform actions that apply across apps, such as "Modify All Data"

- Click on 'About My Favorites' link

Permission Set: My Favorites

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > **Object Settings**

Object Settings

Object Name	Object Permissions	Total Fields	Tab Settings
About My Favorites	--	--	--
Accounts	No Access	31	--
Assets	No Access	18	--
Campaign Members	--	29	--
Campaigns	No Access	37	--
Cases	No Access	35	--
Contacts	No Access	29	--
Content	--	--	--
Contracts	No Access	22	--
Dashboards	--	--	--
Data.com	--	--	--
Documents	No Access	--	--
Events	--	20	--
Getting Started	--	--	--

- Click on 'Edit' button and check "Visible" and "Available" checkbox and save.

Permission Set Overview > Object Settings  About My Favorites 

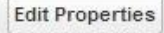
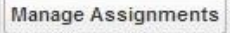
About My Favorites  

Tab Settings

Available	Visible
☒ 	☒ 

- Click on 'Getting Started' link > Click on 'Edit' button and check "Visible" and "Avaliable" checkbox and save.

Permission Set
My Favorites

 |    

Permission Set Overview > Object Settings  Getting Started 

Getting Started  

Tab Settings

Available	Visible
☒ 	☒ 

- Click on 'My Favorites Links' link > Click on 'Edit' button and check "Visible" and "Avaliable" checkbox and save.

Permission Set
My Favorites

 |   

Permission Set Overview > Object Settings  My Favorites Links 

My Favorites Links  

Tab Settings

Available	Visible
☒ 	☐ 

- Click on 'My Favorites' link > Click on 'Edit' button and check follow the screen shot and save.

Permission Set Overview > Object Settings ▾ My Favorites ▾

My Favorites Save Cancel

Tab Settings

Available	Visible
☒ 	☒ 

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒
Edit	☒
Delete	☒
View All	☐
Modify All	☐

Field Permissions

Field Name	Read	Edit
Behavior	☒	☒
Created By	☒	☐
Folder Name	☒	☒
Label	☒	☒
Last Modified By	☒	☐
Owner	☒	☒
Sort Order	☒	☒
Status	☒	☒
URL	☒	☒

- Click on 'My Folders' link > Click on 'Edit' button and check follow the screen shot and save.

Permission Set Overview > Object Settings My Folders

My Folders

Tab Settings

Available	Visible
☒ i	☒ i

Object Permissions

Permission Name	Enabled
Read	☒
Create	☒
Edit	☒
Delete	☒
View All	☐
Modify All	☐

Field Permissions

Field Name	Read	Edit
Created By	☒	☐
Description	☒	☒
Folder Name	☒	☒
Last Modified By	☒	☐
Owner	☒	☒
Status	☒	☒

Step 3:

- Go back to Permission Set overview of My Favorites by clicking the link

Permission Set

My Favorites

[Clone](#)[Delete](#)[Edit Properties](#)[Permission Set Overview](#)[Object Settings](#)[My Favorites](#)

My Favorites

[Save](#)[Cancel](#)

Tab Settings

- Click on 'Visual Force Page Access' link under Apps section

Permission Set

My Favorites

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

Permission Set Overview

[Assigned Users](#)

Description	Permission Set to grant access to My Favorites app	API Name	My_Favorites
User License		Namespace Prefix	
Created By	WebiderCRM MyFavTESTAdmin, 10/19/2013 9:38 AM	Last Modified By	WebiderCRM MyFavTESTAd

Apps

Settings that apply to Salesforce apps, such as Sales, and custom apps built on Force.com
[Learn More](#)

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

- Click on 'Edit' button
- Add My Favorites, MyFav_Mobile, MobileShareFolder, MyFavorites_Publisher_Action, cloneFolder, cloneFolderMobile, shareFolders, Getting Started and cloneFolder from 'Available Visualforce Pages' box to 'Enabled Visualforce Pages' Box

Permission Set
My Favorites

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > Visualforce Page Access

Visualforce Page Access Edit

Visualforce Page Name | Installed Package

Permission Set Overview > Visualforce Page Access

Visualforce Page Access Save Cancel

Available Visualforce Pages

Enabled Visualforce Pages

- webider_myfav.Getting_Started
- webider_myfav.MobileShareFolder
- webider_myfav.MyFav_Mobile
- webider_myfav.MyFavorites
- webider_myfav.MyFavorites_Publisher_Action
- webider_myfav.cloneFolder
- webider_myfav.cloneFolderMobile
- webider_myfav.shareFolders

Add
Remove

Step 4:

- Add permission set to the selected users
- Go to Setup > Manage User > Click on User name to see the details
- Click on 'Permission Set Assignments' related list from the top and Click on 'Edit Assignments' button

Home My Favorites About My Favorites +

Expand All | Collapse All

Quick Find

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings
- My Social Accounts and Contacts

App Setup

- Customize
- Create
- Develop
- Deploy
- Schema Builder
- Canvas App Previewer
- Installed Packages
- AppExchange Marketplace
- Critical Updates

User john smith

Permission Set Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Managers in the Role Hierarchy [0] | OAuth Connected Apps [0]

Permission Set Assignments Edit Assignments

No records to display Edit Assignments

Alias	john	User License	Salesforce
Email	john.smith@webider.com	Profile	Standard User
Username	john.smith@webider.com	Active	☒
Nickname	john	Marketing User	☐
Title	Mr Sithm	Offline User	☐
Company	Webider	Knowledge User	☐
Department	Sale	Force.com Flow User	☐
Division	Web	Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los Angeles)	Site.com Publisher User	☐

- Select permission set 'My Favorites' from Available List and move it to Enabled Permission Sets list

Home My Favorites About My Favorites +

Expand All | Collapse All

Quick Find

Force.com Home

System Overview

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration
- My Chatter Settings
- My Social Accounts and Contacts

App Setup

- Customize
- Create
- Develop
- Deploy
- Schema Builder
- Canvas App Previewer
- Installed Packages
- AppExchange Marketplace
- Critical Updates

Permission Set Assignments john smith

Save Cancel

Available Permission Sets

My Favorites

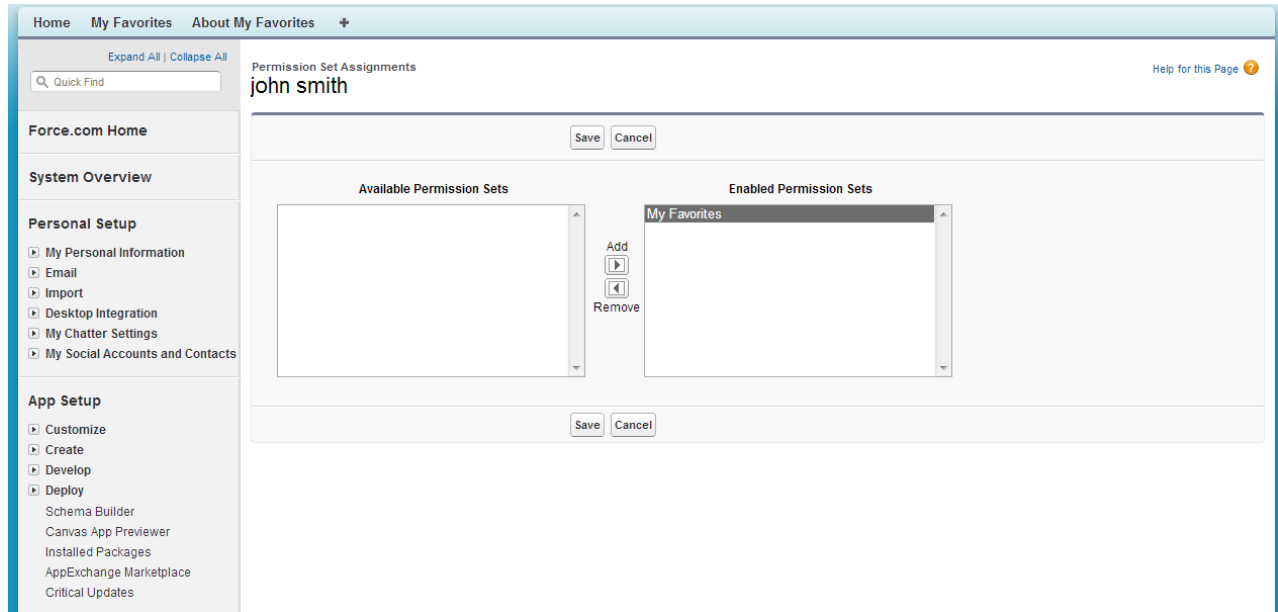
Enabled Permission Sets

--None--

Add Remove

Save Cancel

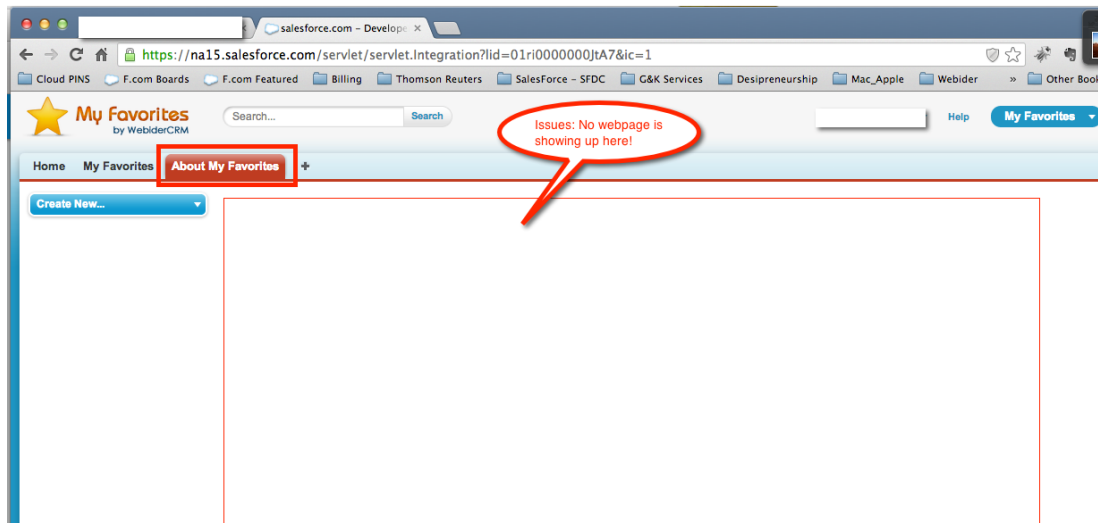
- Click Save



- Now your users should be able to see Two tabs for My Favorites app and able to manage their bookmarks

Q2: Why nothing shows up under 'About My Favorites' Tab?

When I click on the 'About My Favorite' tab, I do not see anything on the right pane, just the blank page

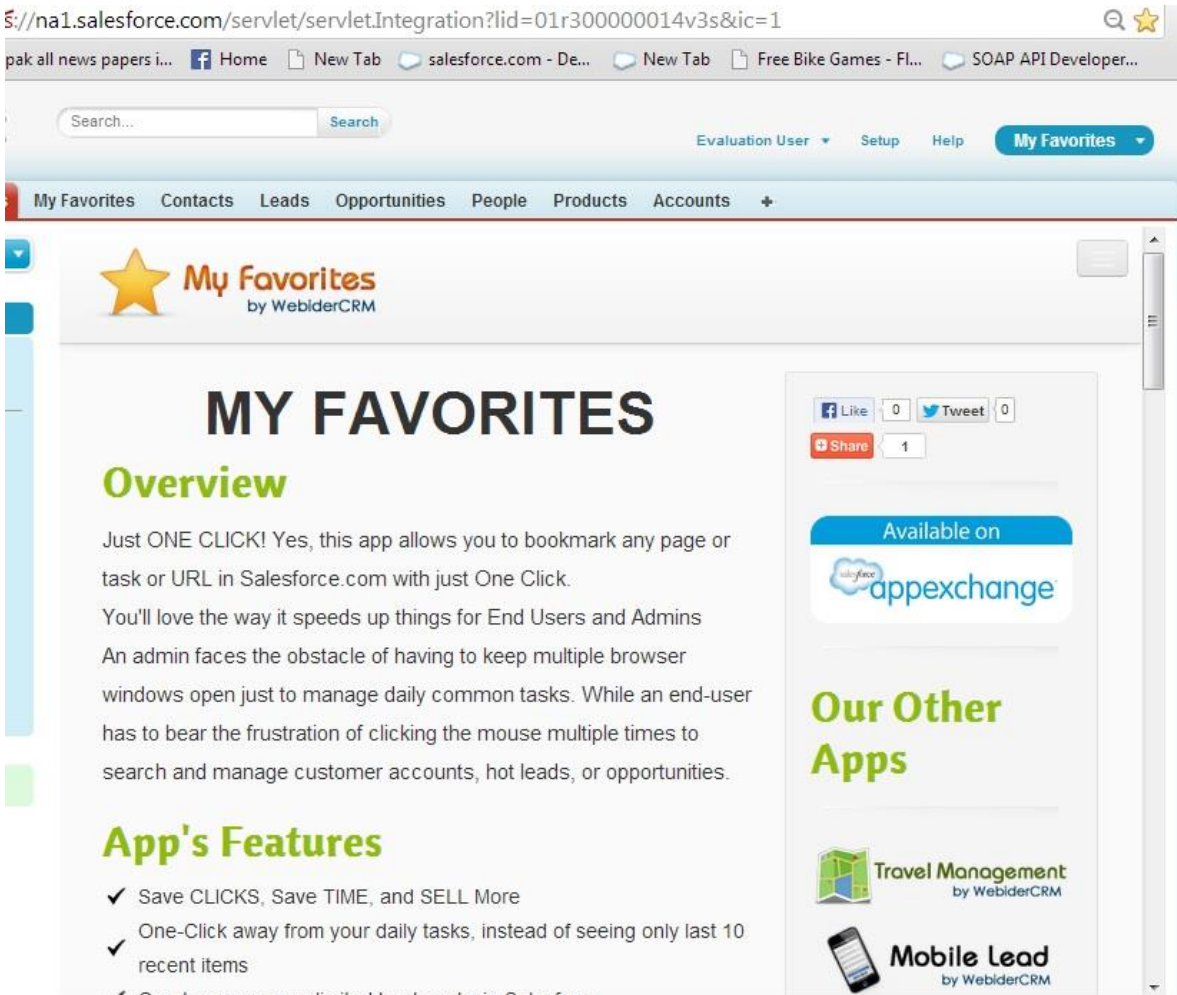
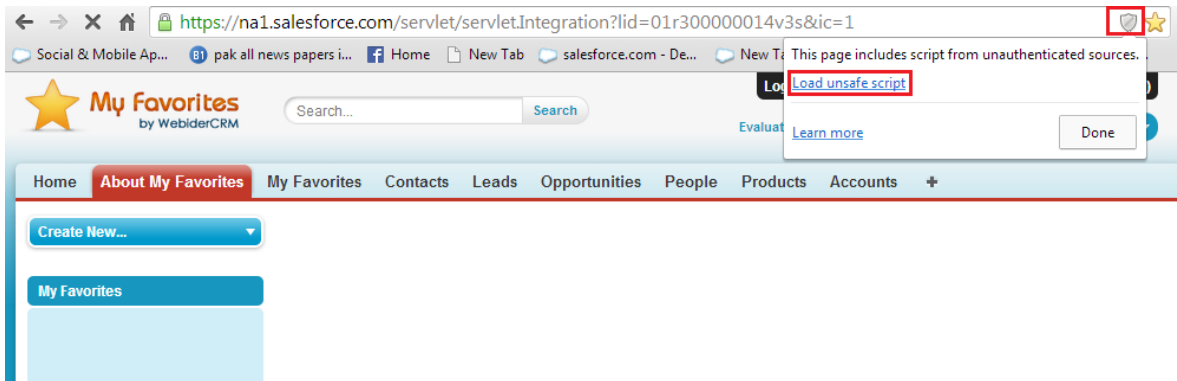


A2: Updating the browser settings to see content of web tab 'About My Favorites' " in any browser just load page without ssl certificate".

- This issues happens due to loading an external url from WebiderCRM website to display within the webtab
- Your browsers automatically blocks the non-SSL pages when visiting within a webtab
- You need to disable the SSL protection on this page to allow Salesforce.com to load the website content in webtab
- Please see the supported browser list to verify that your version of the browser is supported by Salesforce.com
 - https://help.salesforce.com/apex/HTViewHelpDoc?id=getstart_browser_overview.htm&language=en_US

Google Chrome Settings

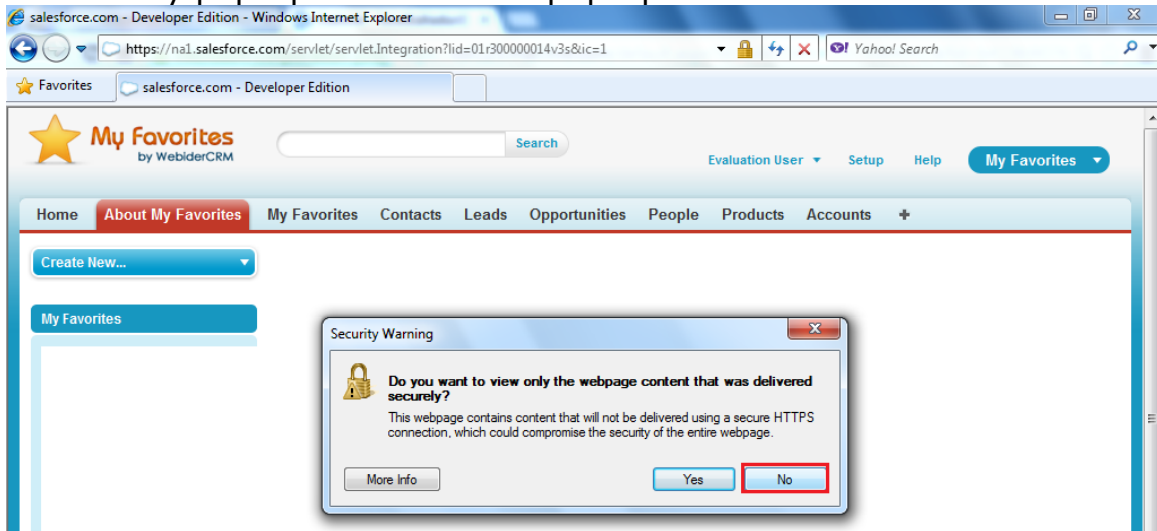
- For **Google Chrome** just go to the right top on the address bar and click on the shield icon and click on "Load unsafe script"



Internet Explorer Settings

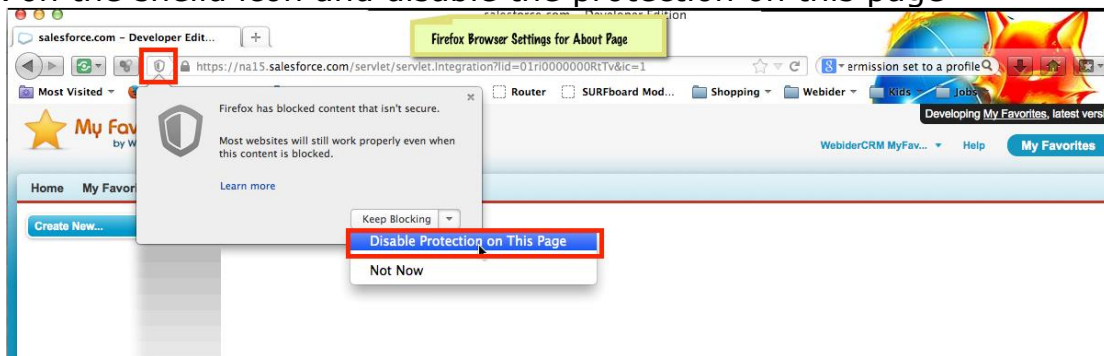
- For Internet Explorer: click the About My favorites Tab

- Go to security pop-up window > On pop-up window click "NO"



Firefox Browser Settings

- You will see the shield icons on the left side of the address bar, when there is no page displayed under About My Favorite tab
- Click on the shield icon and disable the protection on this page



Safari Browser Settings

- Perform the similar steps for Safari or any other browsers as well
- You need to disable the protection on this page to allow non SSL page to be displayed

More Browser Settings:

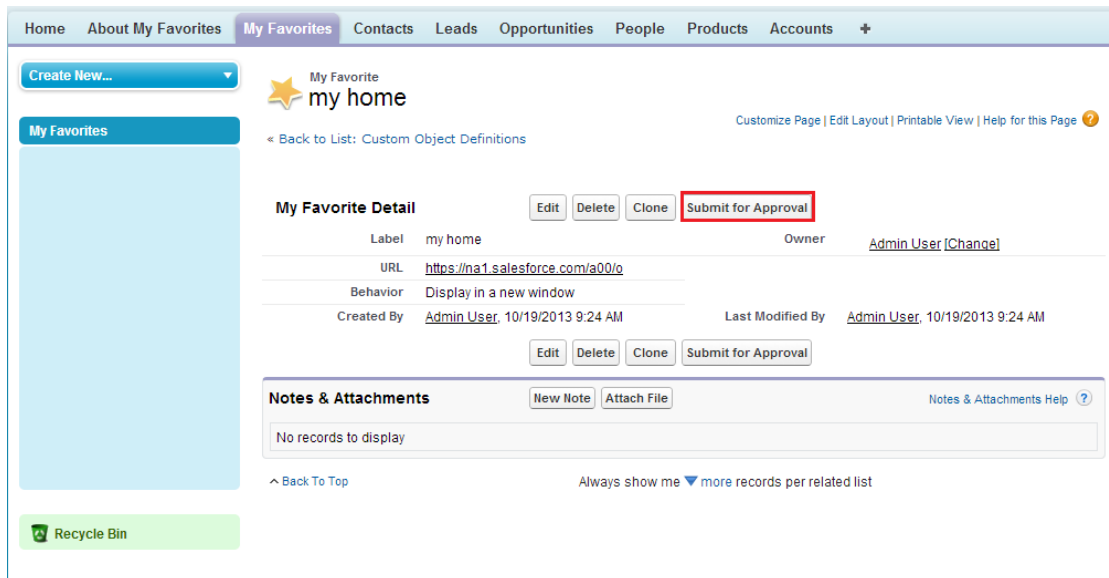
If your issues is still not resolved then please visit the following URLs to perform the actions to delete cookies and set recommended settings:

- IFRAME or Web Tab Content Displays Blank Page

- https://help.salesforce.com/apex/HTViewSolution?urlname=IFRAME-or-Web-Tab-Content-Displays-Blank-Page-1327107637323&language=en_US
- Why is my browser not behaving properly, even after applying the recommended browser settings?
 - https://help.salesforce.com/HTViewSolution?id=000006545&language=en_US
- Deleting cookies on different browsers
 - https://help.salesforce.com/apex/HTViewSolution?urlname=Deleting-cookies-on-different-browsers-1327106104880&language=en_US

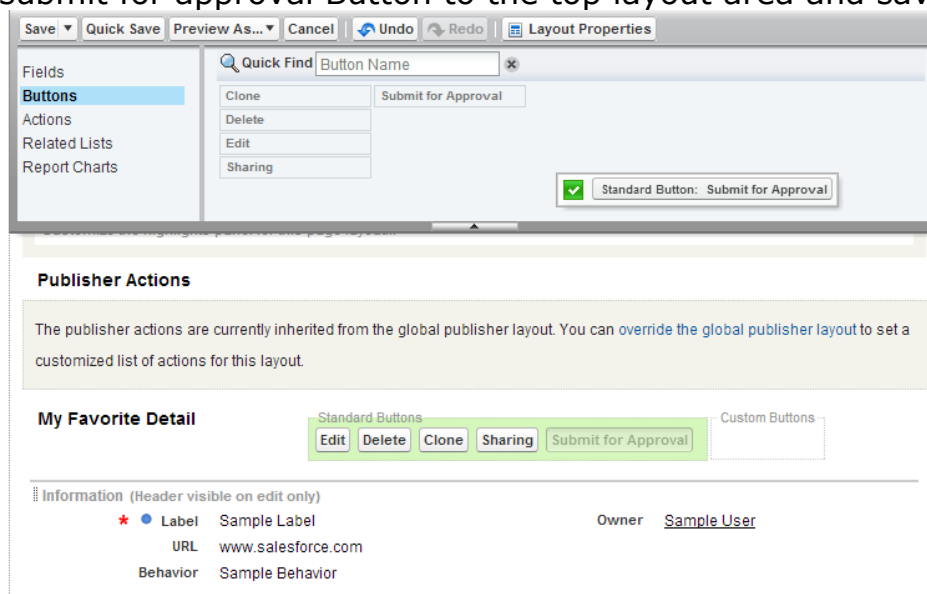
Q3: Why Submit for Approval Button shows up on Detail page ?

- When I click on any bookmark to see the details, I see submit for Approval Button. What it is used for or why am I seeing this or how can I remove it?



A3: Admin needs to Edit page layout to hide 'submit for approval' button

- If you see 'submit for approval' button on the detailed page, please have your administrator to perform the following steps:
- Go to Setup > Create > objects > My Favorite > Page Layout > Edit
- Drag the submit for approval Button to the top layout area and save page layout.



Q4: How to Change the total number of URLs per page in widget & Hide Support icon from widget and Getting Stared page ?

A4: Custom Settings Configurations

- We introduced a new custom setting '**MyFav Setting**' in this version we added two user more new features,
 1. Number of Records per Page
 2. User Voice Widget for Feedback
- To assign Default Organization Level Value / or user profiles to the custom setting, please follow these steps:
 - Navigate to Your Name | Setup | Develop | Custom Setting
 - Click on "**MyFav Setting**"
 - Click to Manage
 - Click New
 - Assign Organization Level Value, User or Profile
 - For "**Feedback Widget**" type no if you want to hide widget from narrow component and Getting Started page.
 - **Note*:** Default value yes
 - For "**Max URL Per Page**" enter the limit you want to see per page
 - **Note*:** Default value 15

Q5: How to Clone the folder with favorites & show the clone with favorites button on Folder object Detail page ?

A5: Update My Folder page layout with new custom button

A new custom button called "**Clone with Favorites**" has been added to allow cloning of existing folders along with its Favorites link. Please follow the following steps to replace the default Clone button with 'Clone with Favorites' button:

- a. Navigate to the My Folder Page layout in the Setup Menu
 - i. Setup > Create > object > My Folder
- b. Click edit under Page Layouts for "Folder List Layout"

Page Layouts				New	Page Layout Assignment
Action	Page Layout Name	Installed Package	Created By		
Edit Del	Folder List Layout	My Favorites	SFDC Admin MyFavTest		

- Click on 'Buttons' under top panel > Drag 'Clone with Favorites' button onto custom button section on the page > drag 'Clone' or any other extra button (like Sharing) from page layout to top panel > Save

Folder List Layout

Custom Console Components Mini Page Layout Mini Console View Video Tutorial Help for this Page

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

Fields

Buttons

Actions

Expanded Lookups

Related Lists

Report Charts

Visualforce Pages

Quick Find Button Name

Clone Sharing

Clone with Favorites Submit for Approval

Delete

Edit

Standard Button: Clone

My Folder Sample

Highlights Panel

Customize the highlights panel for this page layout...

My Folder Detail

Standard Buttons Edit Delete Clone

Custom Buttons Clone with Favorites

remove 'Clone' button from the page layout by drawing it up to button section above

Move 'Clone with Favorites' new button from the panel above to the page layout under custom buttons

Please feel free to reach out to us via email if you have any questions or need more information

- We recommend to contact us for any issues or enhancements via our [about us](#) page or [email](#) as compared to review section on AppExchange
- We appreciate your positive reviews on AppExchange**

Thanks

Webider

Webider (web – 'ider) is a Salesforce.com ISV Partner company based in Twin Cities, Minnesota, founded in 2008. Webider focuses their time on building Force.com apps to help reduce the time and cost of Salesforce.com customizations. Our goal is to provide quality and affordable #cloud apps to the businesses who want to leverage AppExchange to increase their return on investment (ROI) and adoption on Salesforce.com platform.

We specialize in Salesforce Development, Administration, and Custom Cloud App Development. We combine our decade plus experience in CRM industry with innovative software and professional support / services.



Web: <http://www.webider.com>; **Email:** contact@webider.com



<https://www.facebook.com/webider>



<https://twitter.com/Webider>



<http://www.linkedin.com/company/webider-llc>



<http://www.youtube.com/webider>