

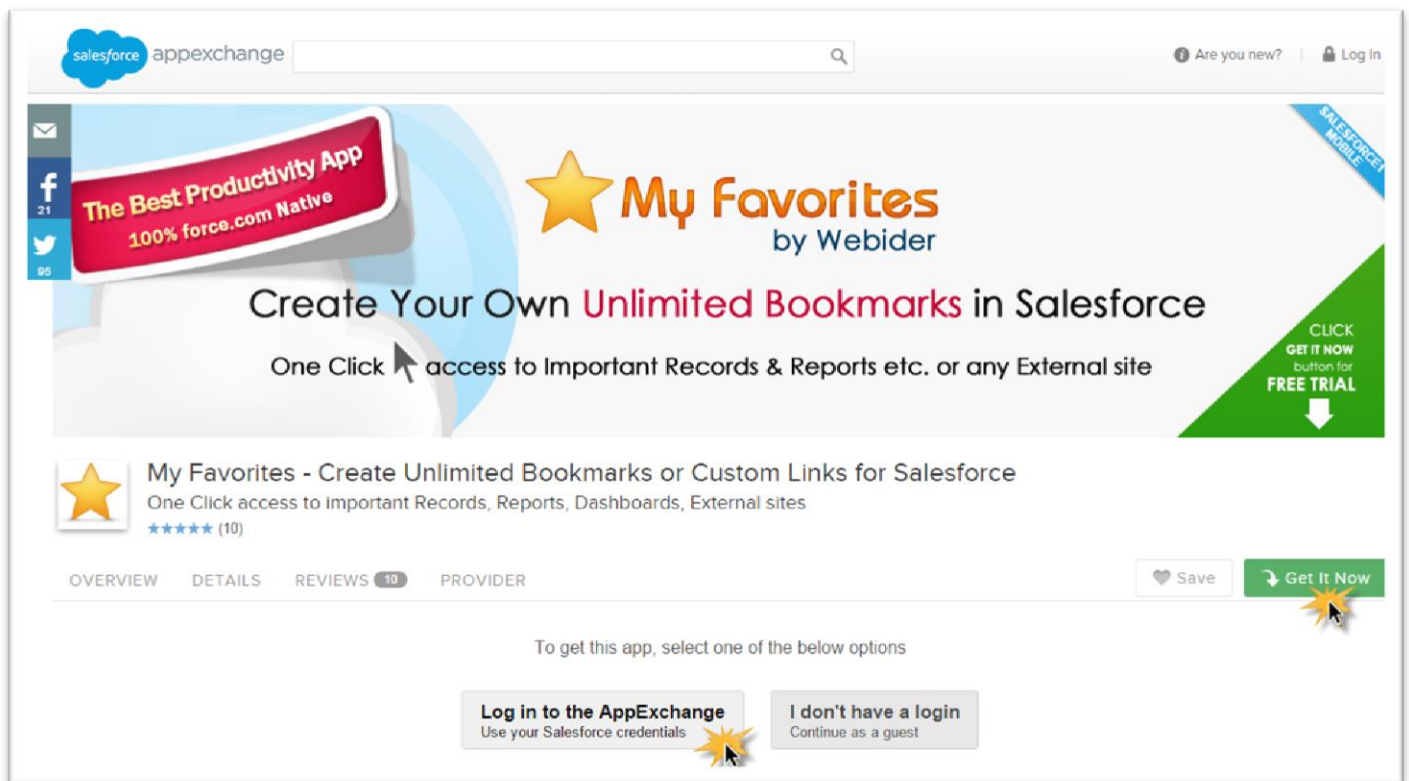
# POST INSTALLATION GUIDE

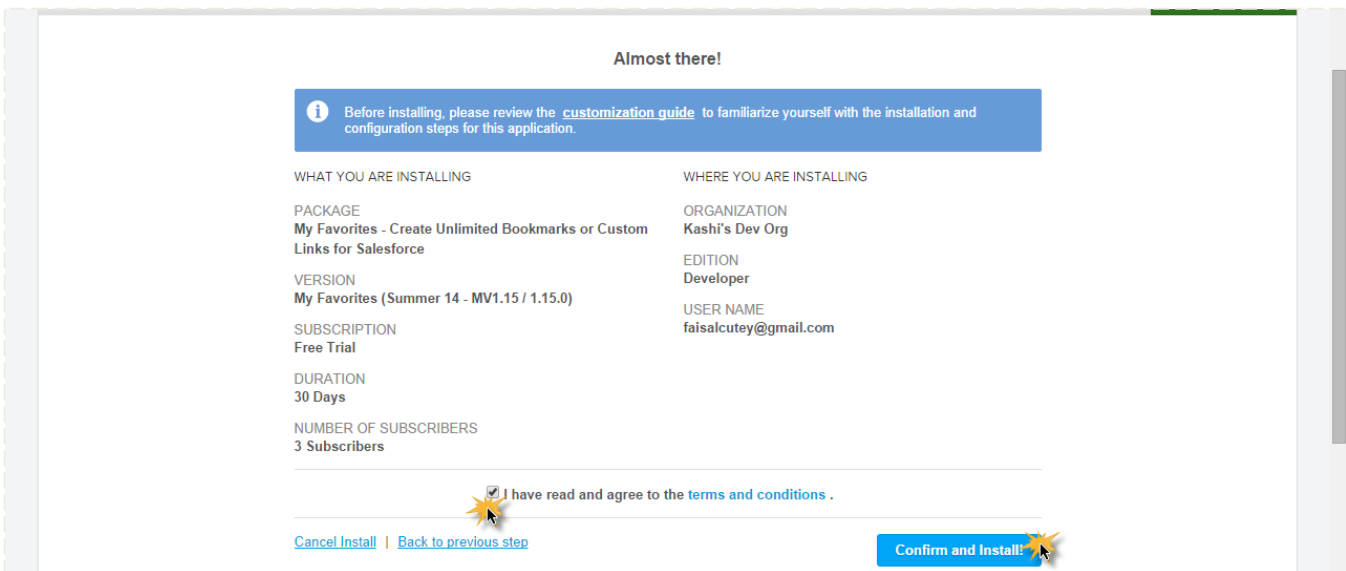
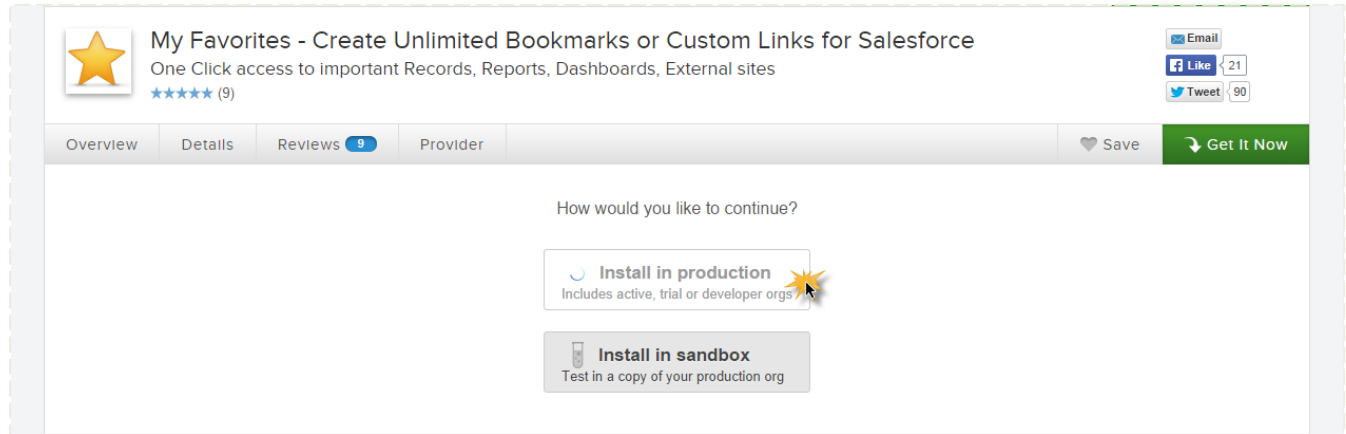


## PURCHASING MY FAVORITES

To purchase My Favorite please follow the steps below.

1. Visit My Favorites on the AppExchange. i.e.
  - a. <https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B4x4UEAR>
2. Click **"Get It Now"** Green Button to install the free trail. (Already installed? Skip to the next step)





3. Return to the My Favorites page and Login using the link in the upper right hand corner.
4. The "Get It Now" button will turn into a **"Buy Now"** button.
5. Click **"Buy Now"**, enter your credit card details, and the number of licenses you need.
6. Optional: If you have any discount coupon, enter discount coupon ID and it should show the applied discount.
7. Done. Simple as that!

## MANAGING USER LICENSES

After purchasing individual user licenses for My Favorites you will need to provide your designated users Access to the app (Unless you have the site license). You may also transfer licenses between users via the steps below.

1. Navigate to Your **Name | Setup | App Setup | Installed Packages**
2. Click on **My Favorites**
3. Click on **Manage Licenses**
4. Select Users who you want to provide access
5. Click Add

Add Users

My Favorites

Help for this Page ?

View: All [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Available Users

[Select Shown](#) [Deselect Shown](#) [Deselect All](#) [Add All Users](#)

| Action                              | Full Name        | Role          | Active                              | Profile                 |
|-------------------------------------|------------------|---------------|-------------------------------------|-------------------------|
| <input type="checkbox"/>            | Person, Platform |               | <input type="checkbox"/>            | Customer Community User |
| <input type="checkbox"/>            | Person, Platform |               | <input checked="" type="checkbox"/> | Customer Community User |
| <input type="checkbox"/>            | Manager, Sales   | Sales Manager | <input checked="" type="checkbox"/> | MyWarehouse App User    |
| <input type="checkbox"/>            | Person, Sales    | Salesperson   | <input checked="" type="checkbox"/> | Standard Platform User  |
| <input checked="" type="checkbox"/> | User, Platform   | Sales Manager | <input type="checkbox"/>            | Standard Platform User  |

Selected Users

| Action                              | Full Name      |
|-------------------------------------|----------------|
| <input checked="" type="checkbox"/> | User, Platform |

[Add](#) [Cancel](#)

## ASSIGN PROFILES/USERS TO CUSTOM SETTINGS

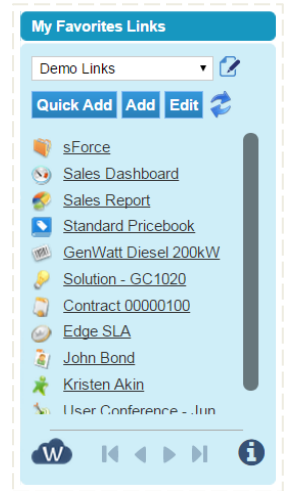
There are couple custom settings those allow you to set few features for My Favorites Home page component such as maximum number of favorites links shown on each page and user voice widget for feedback etc. Follow the steps below to configure the required settings:

### CONFIGURE MYFAV SETTING

'My Fav Setting" contains following two custom settings:

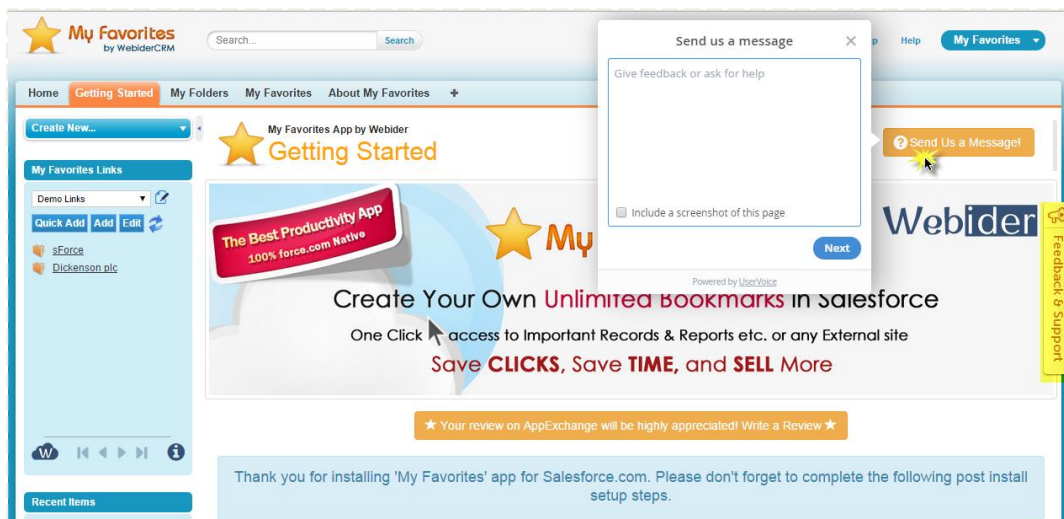
#### 1. Number of Favorites Links per Page in Home page narrow component

- This setting allows you to define how many Favorites Links to display on the widget before the arrows gets highlighted to page through the links.
- The default setting is 15 Favorites Link.
- After 10 Favorites Links the auto scroll will show up allowing you to scroll up and down within the home page narrow component.
- You may set this setting for organization wide or only for selected users or profiles.



#### 2. User Voice Widget icon for Feedback

- This setting allows you to enable or disable the User Voice Feedback widget "?" icon on Getting Started Tab.
- This User Voice plugin allows users to directly submit any error or feedback to Webider right from the app and get access to our knowledge base as well.
- You may disable this setting organization wide or only for selected users or profiles.



## STEPS TO CONFIGURE 'MYFAV SETTING'

- To assign Default Organization Level Value / or user profiles to the custom setting, please follow these steps below:
  - Navigate to **Your Name | Setup | Develop | Custom Setting**
  - Click on "**MYFAV SETTING**"
  - Click to **Manage** button

The screenshot shows the Salesforce1 Setup interface. On the left sidebar, the 'Develop' menu item is highlighted with a red circle. The main content area displays the 'Custom Setting Definition' for 'MyFav Setting'. A 'Manage' button is circled in red. Below this, a table lists the details of the custom setting. At the bottom, a 'Custom Fields' section shows two fields: 'Feedback Widget' and 'Max URL Per Page', both with 'Edit' links and a 'New' button above them.

| Label              | MyFav Setting                  | Object Name  | MyFavSetting      |
|--------------------|--------------------------------|--------------|-------------------|
| API Name           | webider_myfav__MyFavSetting__c | Setting Type | Hierarchy         |
| Visibility         | Public                         | Description  |                   |
| Namespace Prefix   | webider_myfav                  | Created Date | 10/1/2014 3:32 PM |
| Last Modified Date | 10/1/2014 3:32 PM              | Record Size  | 105               |

| Action | Field Label      | API Name                         | Installed Package | Data Type    | Modified By                             |
|--------|------------------|----------------------------------|-------------------|--------------|-----------------------------------------|
| Edit   | Feedback Widget  | webider_myfav__FeedbackWidget__c | My Favorites      | Text(3)      | SFDC Admin MyFavTest, 10/1/2014 3:32 PM |
| Edit   | Max URL Per Page | webider_myfav__MaxURLPerPage__c  | My Favorites      | Number(2, 0) | SFDC Admin MyFavTest, 10/1/2014 3:32 PM |

- Click **New Button** above "Default Organization Level Value" section, if you want settings to apply organization wide. Otherwise Click 'New Button' for setup Owner section if you want to have separate setting for particular profile or users. Only selected users or profile will have those setting and rest of the users will have default 15 and yes values, unless you define organization wide default value as well.

Custom Setting Help for this Page ?

## MyFav Setting

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

**New**

▼ Default Organization Level Value

View: All Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

**New**

| Setup Owner ↑          | Location |
|------------------------|----------|
| No records to display. |          |

- 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

## MyFav Setting Edit

Provide values for the fields you created. This data is cached with the application.

**Edit MyFav Setting** Save Cancel

### MyFav Setting Information

Location

|                  |     |
|------------------|-----|
| Feedback Widget  | yes |
| Max URL Per Page | 15  |

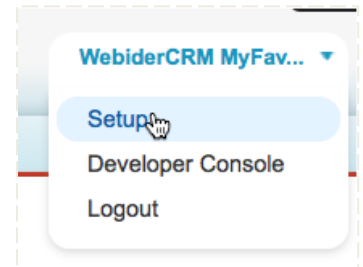
## HOME PAGE COMPONENT CONFIGURATIONS

Please take following two simple steps to enable "**My Favorites Links**" narrow component for your users.

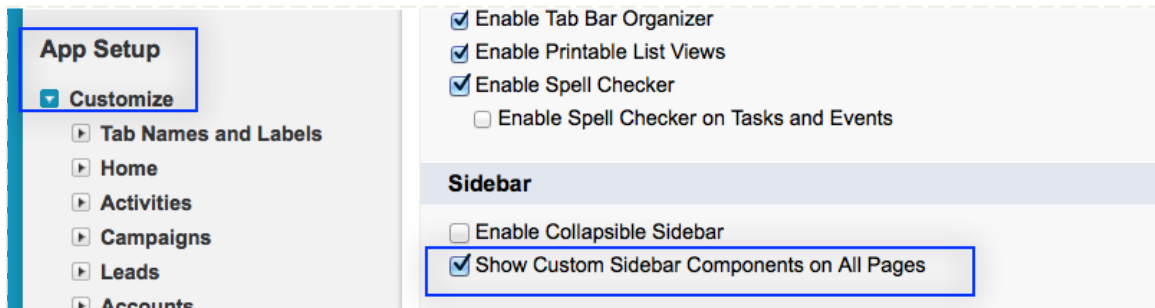
### STEP 1: ENABLE CUSTOM SIDEBAR COMPONENTS ON ALL PAGES

- Click on Your Name drop down on top right and click on Setup

- Navigate to the User Interface section in the Setup Menu
  - App Setup > Customize > User Interface**



- Make sure that "**Show Custom Sidebar Components on All Pages**" is checked



- Click Save

### STEP 2: ENABLE 'MY FAVORITES LINK' HOME PAGE COMPONENT

**Note\*:** Salesforce has stopped support for HTML Based home page narrow component. Therefore, we have added a new Visualforce based home page narrow component called "**My Favorites Links**", you would need to enable/add this new component in home page layout instead of "**My Favorites**". You will see two Home Page Component installed with this package. Please only check the box for "**My Favorites Links**" component for the desired page layouts. The old component is there for customers with older version of the app. Here are the steps

- Navigate to the Homepage Layouts section in the Setup Menu
  - App Setup > Customize > Home > Home Page Layouts**
- Click edit on the default layouts where you'd like My Favorites Links enabled (you'll need to edit each layout if you want My Favorites Links enabled throughout your entire org)

The screenshot shows the 'My Favorites' interface by WebiderCRM. The left sidebar contains navigation links: Home, My Favorites, and About My Favorites. Below these are sections for 'Force.com Home', 'System Overview', 'Personal Setup' (with links to My Personal Information, Email, Import, and Desktop Integration), and 'App Setup' (with links to Customize, Tab Names and Labels, Home, Home Page Components, Home Page Layouts, and Custom Links). The 'Home Page Layouts' link is highlighted with a red box. The main content area is titled 'Home Page Layouts' and includes a description: 'This page allows you to create different tab layouts for the Home Tab.' Below this is a table with columns 'Action', 'Name', and 'Created By'. The table contains one row with the name 'DE Default' and the creator 'WebiderCRM MyFavDevAdmin, 8/31/2013 9:40 AM'. The 'Edit' link in the 'Action' column is highlighted with a red box. Above the table is a 'Page Layout Assignment' button and a 'New' button. At the top of the main content area, there is a search bar labeled 'Quick Find' and a link to 'Expand All | Collapse All'.

- Check **"My Favorites Links"** box under 'Select Narrow Components to Show' section.
  - Make sure you have unchecked the old 'My Favorites' home page component

**Edit Home Layout** Help for this Page

**Step 1. Select the components to show** Step 1 of 2

Choose the components to include on your home page layout.

Layout Name:

**Select Wide Components to Show** I = Required Information

|                  |                                     |                    |                                     |
|------------------|-------------------------------------|--------------------|-------------------------------------|
| Items to Approve | <input checked="" type="checkbox"/> | Calendar           | <input checked="" type="checkbox"/> |
| Tasks            | <input checked="" type="checkbox"/> | Dashboard Snapshot | <input type="checkbox"/>            |

**Select Narrow Components to Show**

|                           |                                     |                         |                                     |
|---------------------------|-------------------------------------|-------------------------|-------------------------------------|
| Create New...             | <input checked="" type="checkbox"/> | Recent Items            | <input checked="" type="checkbox"/> |
| Messages & Alerts         | <input type="checkbox"/>            | Custom Links            | <input checked="" type="checkbox"/> |
| Tags                      | <input checked="" type="checkbox"/> | Customer Portal Welcome | <input type="checkbox"/>            |
| <b>My Favorites Links</b> | <input checked="" type="checkbox"/> | <b>My Favorites</b>     | <input type="checkbox"/>            |

**Callouts:**

- Check the box for new home page component i.e. 'My Favorites Links'
- Uncheck the existing 'My Favorites' home page component.

**Next** **Cancel**

- Verify **"My Favorites Links"** component is visible in the left narrow column, Feel free to adjust the order of the component
- **TIP:** We recommend to move the 'My Favorites Links' component to the top to make it easier for your users to see bookmarks and access them.
- Click Save and Click on Home to view my Favorite component on left column
- **Note:** Make sure to Edit and assign My Favorites component to those home page layout where user profile have licenses to use the My Favorites App. Those who do not have license of My Favorites App, will see the error message in the home page component.

**Step 2. Order the components** Step 2 of 2

Arrange the components on your home page.

| Narrow (Left) Column      | Wide (Right) Column |
|---------------------------|---------------------|
| Create New                | Calendar            |
| <b>My Favorites Links</b> | Tasks               |
| Recent Items              | Items to Approve    |

**Navigation Buttons:** Top, Up, Down, Bottom

**Buttons:** Previous, Save & Assign, Save, Preview, Cancel

## UPDATE LIST VIEWS WITH 'ADD TO FAVORITES' BUTTON

- App comes with custom button **"Add to Favorites"** for following standard objects list view. It allows users to add multiple Selected Records from the object List View to "My Favorites" Selected Folder.
  - Account, Contact**
- Note:** You may create your own buttons for other standard or custom object list views as well and copy/paste the code from any existing button and just update it with your object name.
  - See the section below **"How to add 'Add Favorites' list view button"** for instructions on how to create new custom buttons
- Follow the steps below to add 'Add to Favorites' button to above objects list views:
  - For Example:** Update Account Object 'Account List View' Search Layout
  - Click on Setup > Customize > Accounts > Search Layouts
  - Edit "Accounts List View" search layout
  - Select "Add to Favorites" From Available Buttons and Add to Selected Buttons
  - Click Save

**Build**

- Customize
  - Tab Names and Labels
  - Home
  - Activities
  - Campaigns
  - Leads
  - Accounts**
    - Fields
    - Related Lookup Filters
    - Validation Rules
    - Triggers
    - Partner Roles
    - Contact Roles
    - Page Layouts
    - Field Sets
    - Compact Layouts
    - Search Layouts**
    - Buttons, Links, and Actions
    - Record Types
    - Limits
    - Account Teams
    - Settings

### Account Search Layouts

Search layouts allow you to select the standard and custom fields that are displayed in the following search

- Search Results Columns for search and tagging. [View example](#)
- Lookup Dialogs that pop up when you click the magnifying glass on Lookup fields. [View example](#)
- Lookup Phone Dialogs that pop up when you click the magnifying glass on a SoftPhone dial pa
- Recently viewed, modified, and created records lists displayed on tab home page. [View example](#)
- Search Results Filter Fields for search. [View example](#)

Search layouts also allow you to select the standard and custom buttons that are displayed in the followin

- Search Results for search and tagging.
- List Views for filtering records. [View example](#)

| Action               | Layout                    | Columns Displayed                                            | Buttons Displayed     |
|----------------------|---------------------------|--------------------------------------------------------------|-----------------------|
| <a href="#">Edit</a> | Search Results            | Account Name, Account Site, Phone, Account Owner Alias       |                       |
| <a href="#">Edit</a> | Lookup Dialogs            | Account Name, Account Site, Account Owner Alias, Type        | N/A                   |
| <a href="#">Edit</a> | Lookup Phone Dialogs      | Account Name, Account Site, Account Owner Alias, Type, Phone | N/A                   |
| <a href="#">Edit</a> | Accounts Tab              | Account Name, Billing City, Phone                            | N/A                   |
| <a href="#">Edit</a> | <b>Accounts List View</b> | N/A                                                          | New, Add to Favorites |
| <a href="#">Edit</a> | Search Filter Fields      |                                                              | N/A                   |

## Edit Search Layout

### Accounts List View

Customize the buttons on the Accounts list view:

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

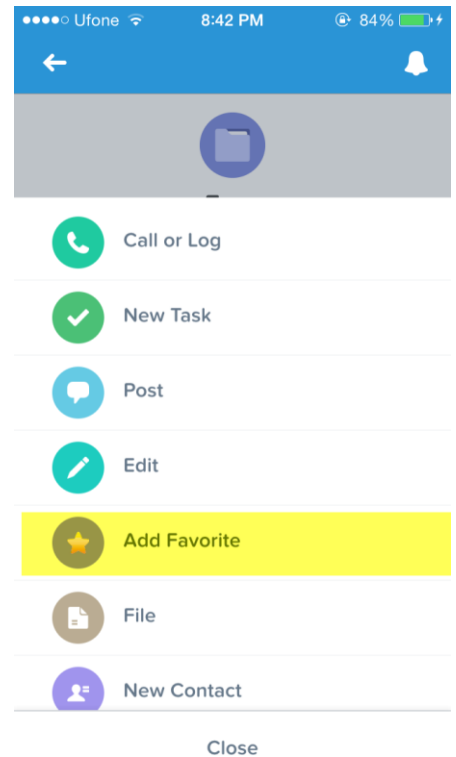
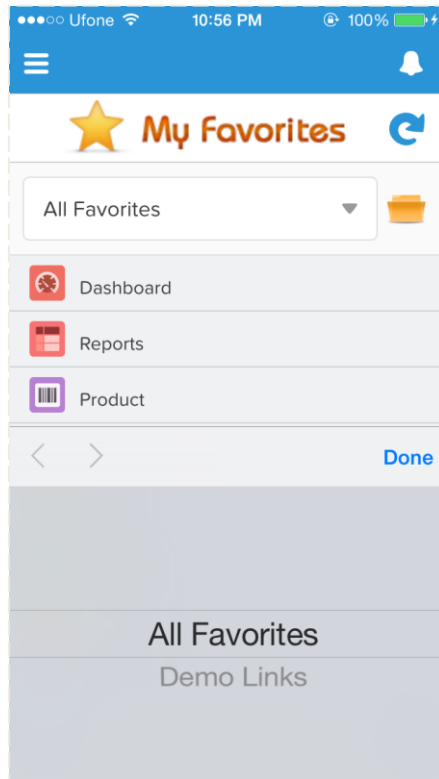
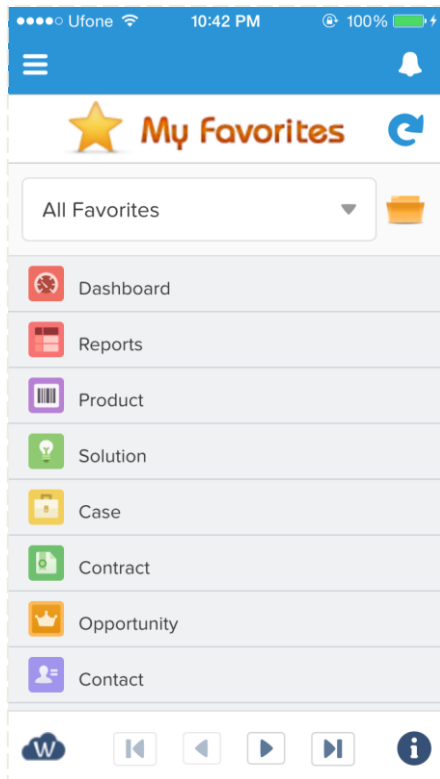
- **Repeat:** Perform the above steps for Contact object as well

- Once you added the button on the search list view layout, you will see the functionality as follows:

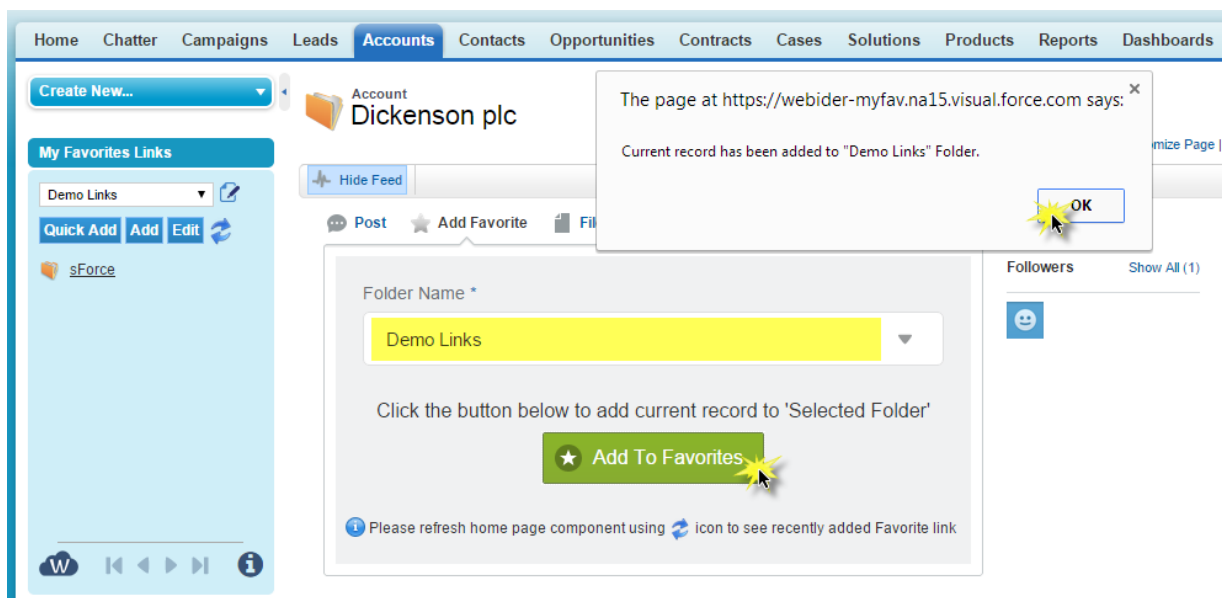
- **Note:** To create 'Add to Favorites' button for all other standard or custom objects, follow the instructions defined in the **APPENDIX** below: [How to create 'Add to Favorites' List View Button.](#)

## SALESFORCE1 MOBILE SETUP:

My Favorites is Salesforce1 Mobile ready and allows you to add and access all your Favorites Links using SF1 Mobile app. In addition, Chatter action to add record as Favorites:



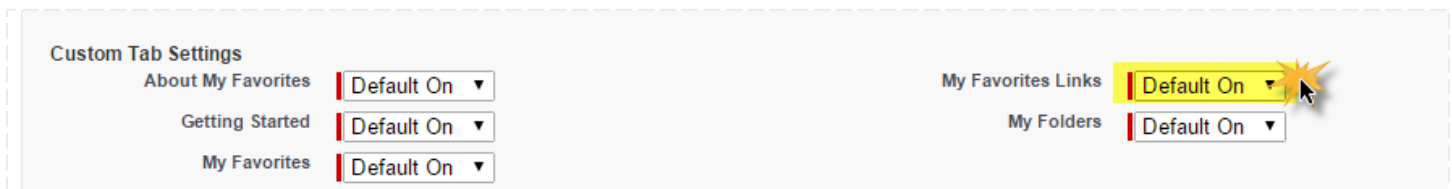
### Chatter Action to Add Favorite



## SET 'MY FAVORITES LINKS' TAB TO 'DEFAULT ON'

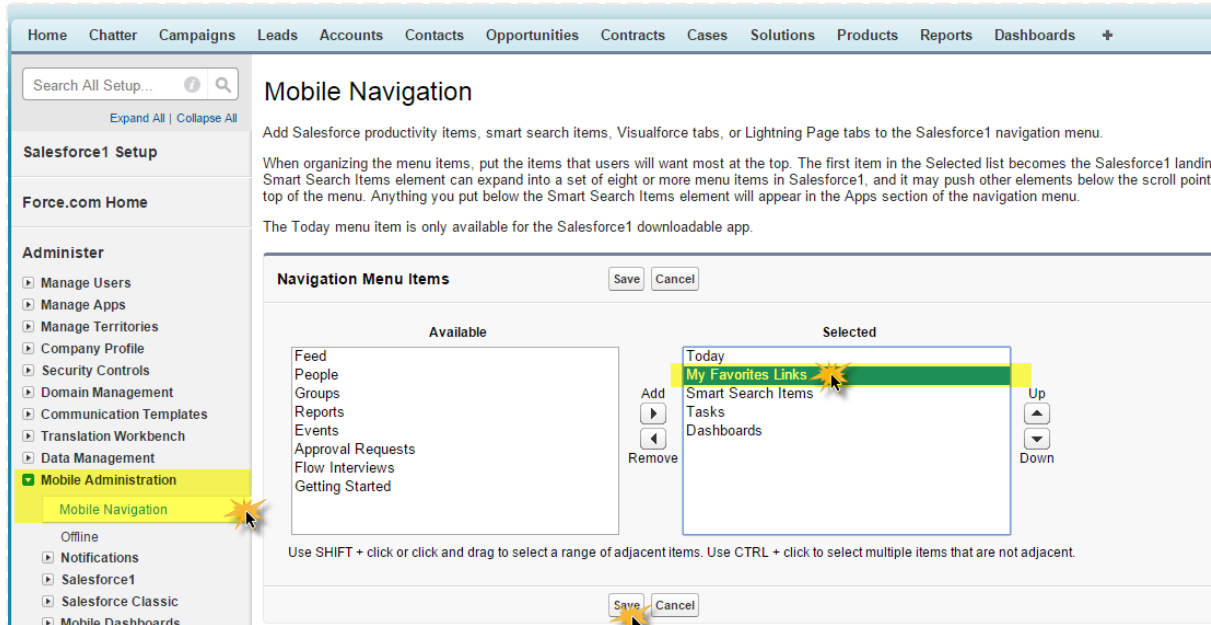
After installation and desktop setup, please perform the following step to add "MyFav Mobile" Visualforce page to your org's Mobile Navigation.

1. Go to the user profile(s) those you want to give access of the app via SF1 Mobile
2. Navigate to Your **Name | Setup | Manage Users | User Profiles**
3. In our case "**Webider Demo**" profile, Edit the Profile
4. Go to the '**Tab Settings**' and set Value for '**My Favorites Links**' tab to "Default On"
5. Click Save



## ADD 'MYFAV MOBILE' TO YOUR MOBILE NAVIGATION

1. Navigate to Your **Name | Setup | Mobile Administration | Mobile Navigation**
2. Select "My Favorites Links" from Available Tab to selected Tab.
3. Move the 'My Favorites Links' Mobile' tab to the top or desired position
  - a. **Tip:** We recommend to move 'My Favorites Links' page to the top of the list or 2<sup>nd</sup> from the top to make it appear in the left Mobile Nav on top.
4. Save



## UPDATE GLOBAL PUBLISHER LAYOUTS

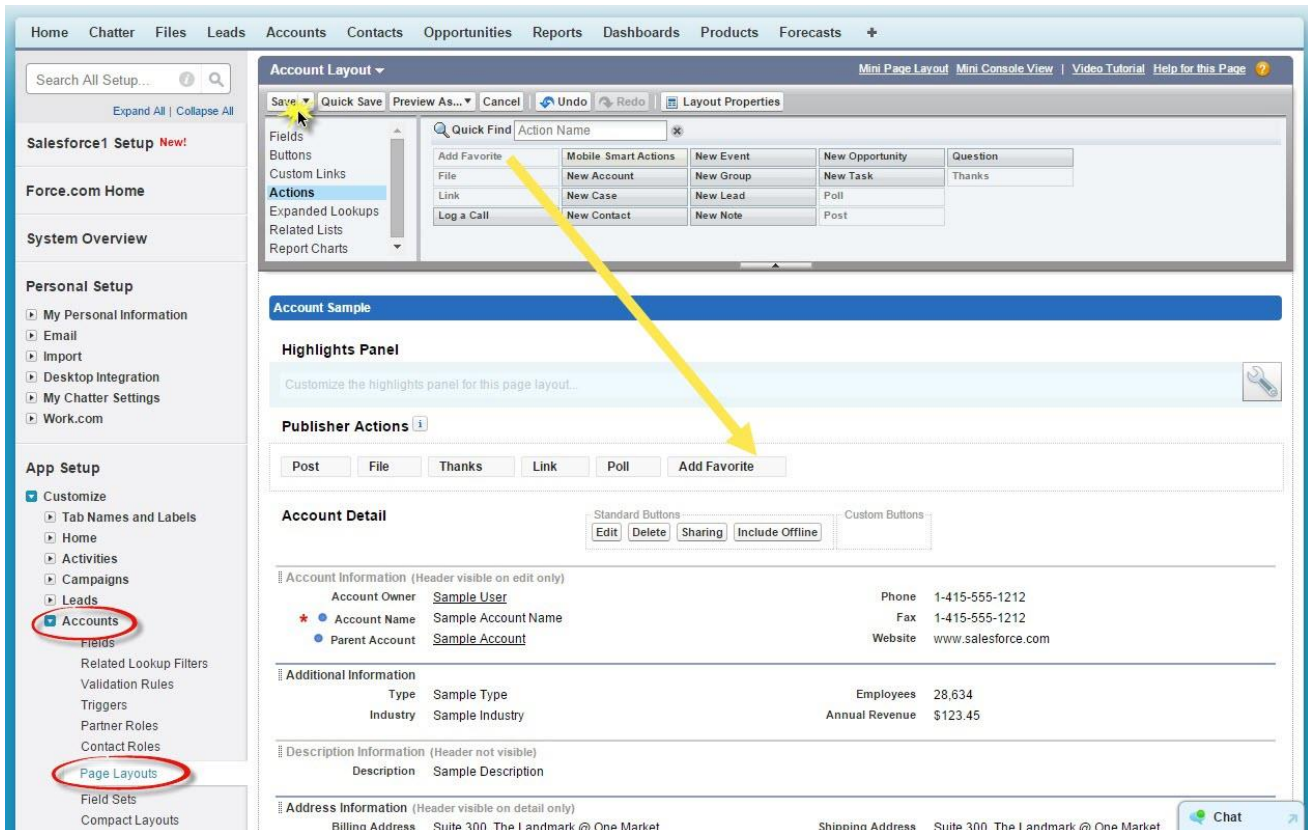
- Please make sure to add "Add Favorites" publisher action to desired or all Global Publisher Layout



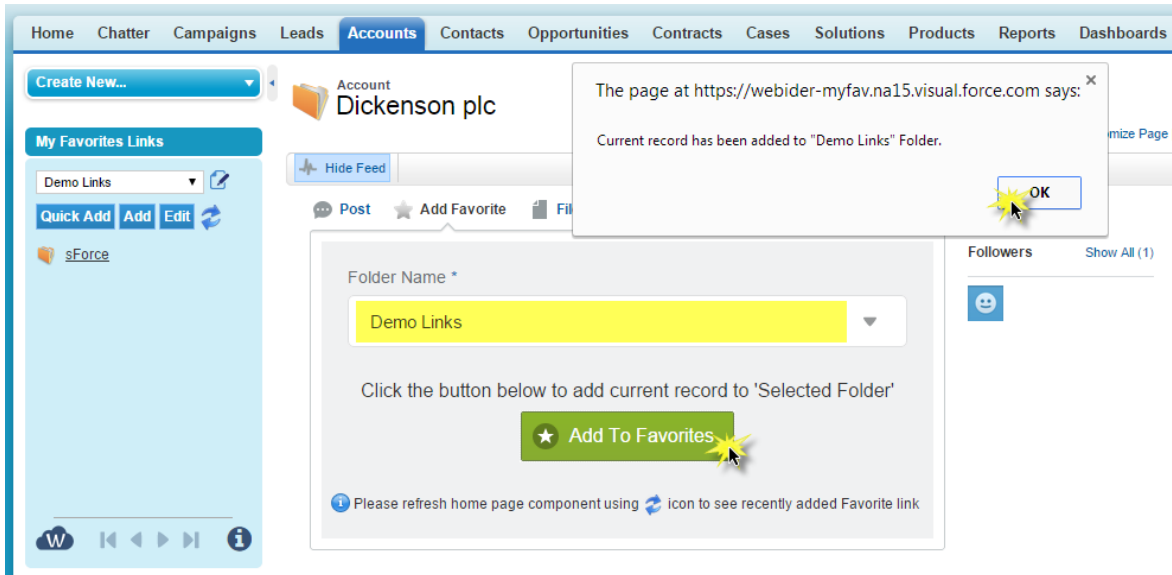
## UPDATE DESIRED PAGE LAYOUTS

- Update desired object page layouts to include "Add Favorites" publisher actions
  - This new publisher action will allow a user to add record as favorites through salesforce1 mobile app and chatter.
  - Steps to enable "Add Favorite" action on standard or custom objects requires an admin to go to the desire object page layout and Drag the "Add Favorite" action on page layout under 'Publisher Action' section

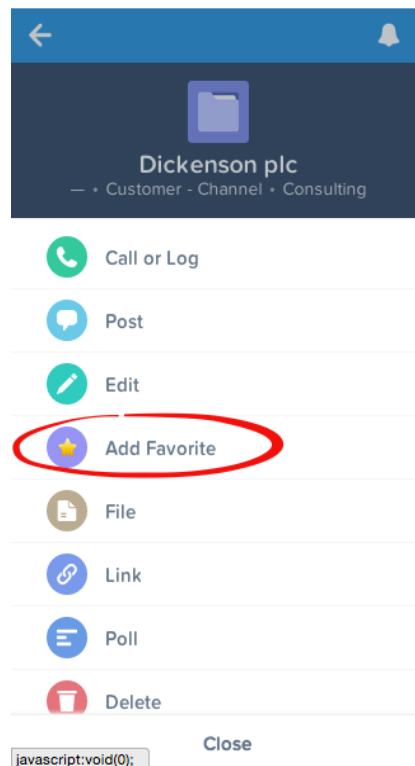
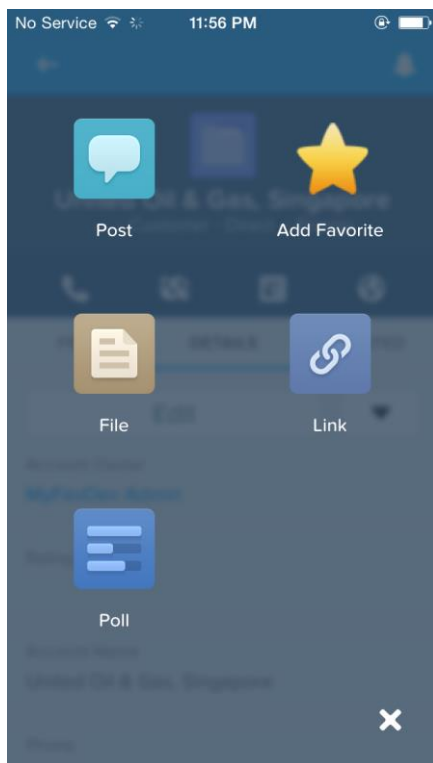
- For Example: Enable "Add favorite" action on Account object, follow steps below:
  - Click on Setup > Customize > Accounts > Page Layouts
  - Edit > Account Layout and click on Actions.
  - Drag "Add Favorite" to publisher Actions panel placed after Poll action.
  - Click Save.

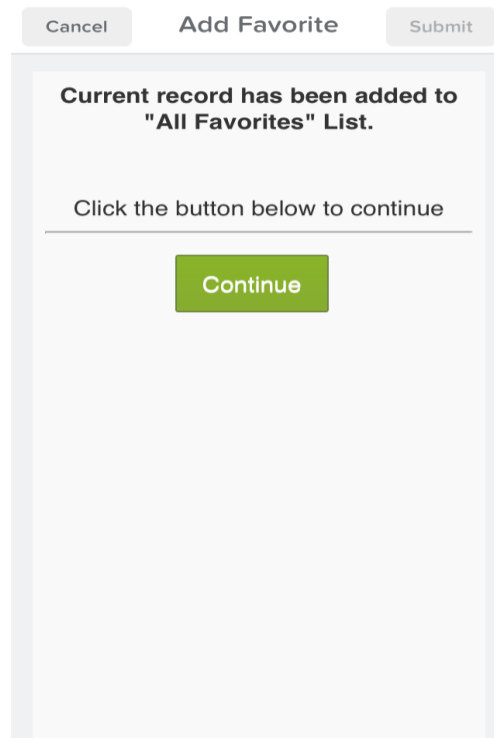


- **Note: Perform the above steps for all desired standard and/or custom objects to enable "Add Favorite" publisher Action.**
- Once you have added 'Add Favorites' publisher action to the desired objects, you will also notice a new this Action in Chatter Feed. Like below.
  - It will allow you to add current record to the selected folder in the home page component.

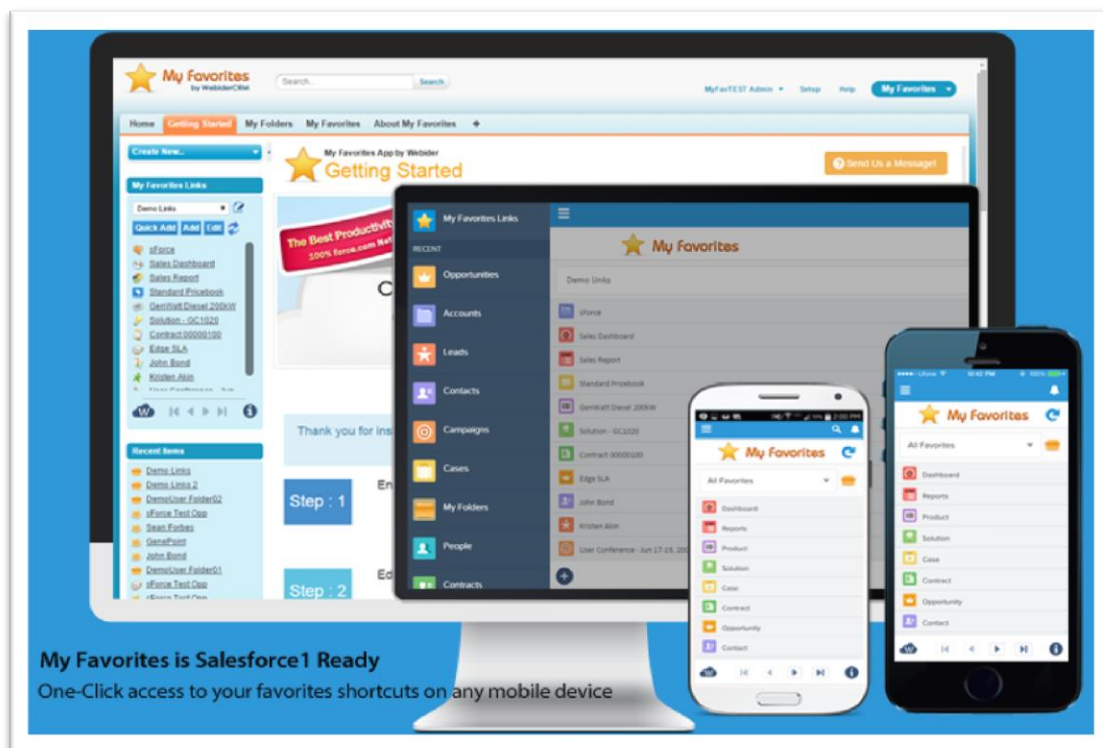


- **Salesforce1 Mobile App** View of Publisher Action when you are on a record





- *Enjoy accessing your Favorites Links right from any mobile device using Salesforce1 App.*



## APPENDIX

### PERMISSIONS TO END USER TO SEE MY FAVORITES APP (TAB)

Make sure that you have assigned the proper permissions to the profile or permission set to the licensed users to be able to access My Favorites app and it's component including the 'My Favorites' tab.

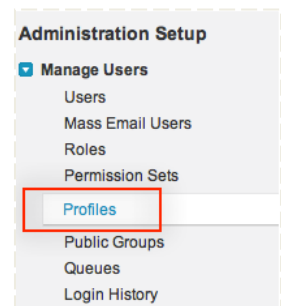
Please only perform these following steps, if necessary. Otherwise, provide access to this App accordingly to your Company's security policy and security setup for user in Salesforce

There are two ways to do this:

1. By editing the profile
2. By creating permission set and assign to desired profiles

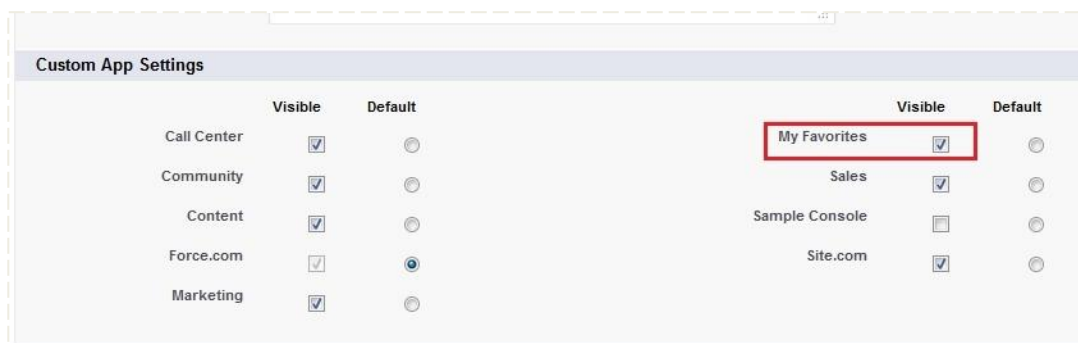
#### PERMISSION BY PROFILE

- Make sure you have edited the user profile and edited the '**Custom Object Permissions**' section to ensure that particular profile has access to '**My Favorites**' app
- Edit the profile or profiles that you have assigned to your users



#### CUSTOM APP SETTINGS FOR MY FAVORITES APP

- Go to the Profile and Click Edit
- Go to 'Custom App Setting' section and select "**My Favorites**" as 'Visible'.



- Goto 'Custom Tab Settings' section and update the picklist value to "**Default on**" for My Favorites App tabs i.e. About My Favorites, Getting Started, My Favorites and My Folders.

- Enable 'My Favorites Links' for mobile access to your Favorites Links component

**Custom Tab Settings**

|                    |              |                    |              |
|--------------------|--------------|--------------------|--------------|
| About My Favorites | Default On ▼ | My Favorites Links | Default On ▼ |
| Getting Started    | Default On ▼ | My Folders         | Default On ▼ |
| My Favorites       | Default On ▼ |                    |              |

- Set 'Custom Object Permissions' and set Basic access (Read, create, Edit and delete) to both object My Favorites and My Folders. This allows users to add/edit/delete their own favorites links.

**Custom Object Permissions**

|              | Basic Access                        |                                     |                                     |                                     | Data Administration      |                          |
|--------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
|              | Read                                | Create                              | Edit                                | Delete                              | View All                 | Modify All               |
| My Favorites | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| My Folders   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

- Click "Save"

## SET THE FIELD LEVEL SECURITY

- Click on the Profile again e.g. 'Webider Demo'
- Go to the "Field-Level Security" Section
- Under "Custom Field-Level Security" section you will see 'My Favorites' and 'My Folder' object

**Field-Level Security**

**Standard Field-Level Security**

|                 |          |                     |          |
|-----------------|----------|---------------------|----------|
| Account         | [ View ] | Lead                | [ View ] |
| Asset           | [ View ] | Opportunity         | [ View ] |
| Campaign        | [ View ] | Opportunity Product | [ View ] |
| Campaign Member | [ View ] | Price Book          | [ View ] |
| Case            | [ View ] | Price Book Entry    | [ View ] |
| Contact         | [ View ] | Product             | [ View ] |
| Contract        | [ View ] | Solution            | [ View ] |
| Event           | [ View ] | Task                | [ View ] |
| Idea            | [ View ] | User                | [ View ] |

**Custom Field-Level Security**

|             |          |           |          |
|-------------|----------|-----------|----------|
| My Favorite | [ View ] | My Folder | [ View ] |
|-------------|----------|-----------|----------|

- Click 'View' link for both objects respectively and make sure all fields are Checked Visible for the objects
- Click Edit to set the values
- Checked all 'Visible' boxes

- Click Save

My Favorite Field-Level Security for profile **Webider Demo** [Help for this Page](#)

Save Cancel

| Field Name       | Field Type | Visible                             | Read-Only                           |
|------------------|------------|-------------------------------------|-------------------------------------|
| Behavior         | Picklist   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Created By       | Lookup     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Folder Name      | Lookup     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Label            | Text       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Last Modified By | Lookup     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Owner            | Lookup     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Sort Order       | Number     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Status           | Picklist   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| URL              | URL        | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

Save Cancel

- Repeat the same above steps for "My Folder" object 'Field Level Security'

My Folder Field-Level Security for profile **Webider Demo** [Help for this Page](#)

Save Cancel

| Field Name       | Field Type | Visible                             | Read-Only                           |
|------------------|------------|-------------------------------------|-------------------------------------|
| Created By       | Lookup     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Description      | Text Area  | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Folder Name      | Text       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Last Modified By | Lookup     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Owner            | Lookup     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| Status           | Picklist   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

Save Cancel

## ENABLE VISUALFORCE PAGE ACCESS

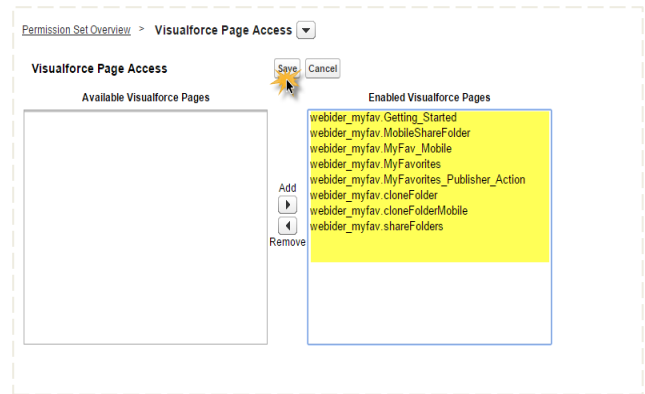
- While you are on the profile, mouse over to the 'Enable Visualforce Page Access' related list link in the top header to go to desired section and Click Edit

Login IP Ranges [0] | Enabled Apex Class Access [2] | **Enabled Visualforce Page Access [0]**

Enabled Visualforce Page Access [Edit](#) [Enabled Visualforce Page Access Help](#)

No Visualforce Pages enabled

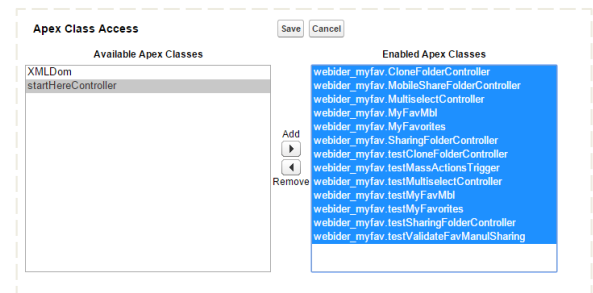
- Add My Favorites, MyFav\_Mobile, MobileShareFolder, MyFavorites\_Publisher\_Action, cloneFolder, cloneFolderMobile, shareFolders, Getting Started and cloneFolder from 'Available Visualforce Pages' box to 'Enabled Visualforce Pages' Box



- Click Save

## ENABLE APEX CLASS ACCESS

- Go to 'Enable Apex Class Access' section and Click Edit
- Make sure you have all the webider\_\*\*\* Apex Classes added to 'Enable Apex Classes Section'
- Click Save

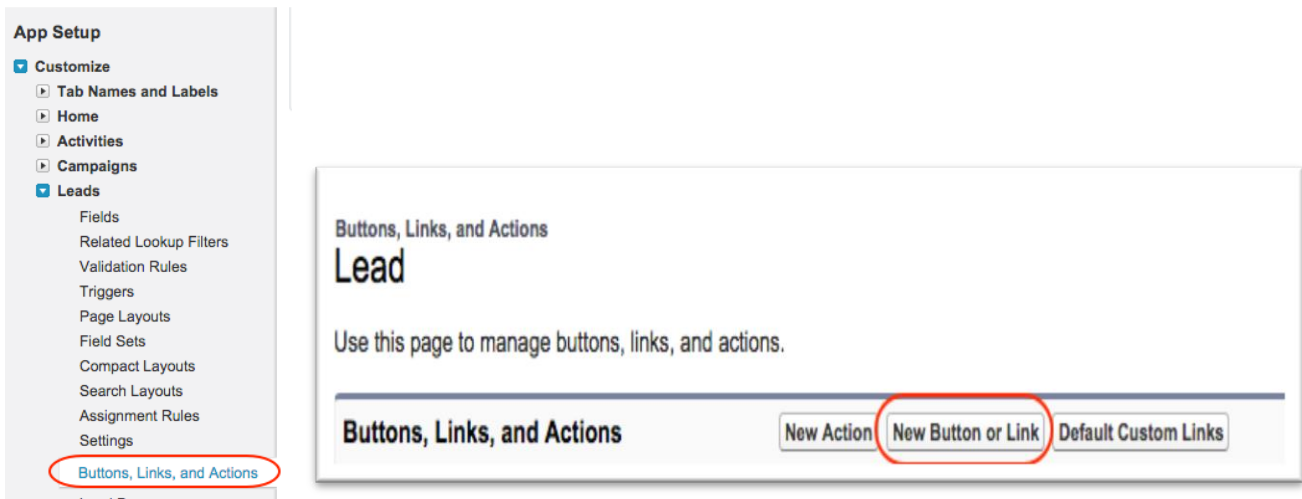


## HOW TO CREATE 'ADD TO FAVORITES' LIST VIEW BUTTON

Follow the steps below to create custom 'Add to Favorite' button for any object list view where you would like the ability to select multiple records and add them as favorites.

### ADDING 'ADD TO FAVORITES' BUTTON FOR STANDARD OBJECTS

- Click on Setup > Customize > <object Name> > Buttons, Links, and Actions
  - **Example:** Creating for Leads object
- Click on 'New Button or Link' button



- Enter the following information in the fields:
  - **Label:** Add to Favorites
  - **Name:** Should be auto populated i.e. Add\_to\_Favorites
  - **Namespace:** verify it is webider\_myfav
  - **Display Type:** List Button
  - **Behavior:** Execute JavaScript
  - **Content Source:** OnClick JavaScript
- Copy the following [code and paste](#) in the code box
- **Note:** Make sure you change the **object type name** and **object name** to your object. There are only two places you need to modify the code with the object name where you are putting the button. Look at the **highlight YELLOW** code below, and make sure you modify it before saving to the button.

- In the above example, we will change 'Account' to 'Lead'

Lead Custom Button or Link

## New Button or Link

**Custom Button or Link Edit** [Save] [Quick Save] [Preview] [Cancel]

**Label** Add to Favorites

**Name** Add\_to\_Favorites i

**Namespace Prefix** webider\_myfav

**Description** Leads List View Add to Favorites button

**Display Type**

- ☐ Detail Page Link [View example](#)
- ☐ Detail Page Button [View example](#)
- ☒ List Button [View example](#)

**Behavior** Execute JavaScript [View Behavior Options](#)

**Content Source** OnClick JavaScript

**Select Field Type** Lead

**Insert Field** -- Insert Merge Field -- Insert Operator

```

{!REQUIRESRIPT("/soap/ajax/30.0/connection.js")}
{!REQUIRESRIPT("/soap/ajax/30.0/apex.js")}

//flag check the folder
var IsAnyFolder=false;
//contain the folder name
var FolderName ="All Favorites";
//Contain the folder Id
var folderId="";

//get id of selected Records
var idsToAdd = {!(GETRECORDIDS($ObjectType.Lead))};
  
```

- Add the newly custom button to the object desired page layout
  - Follow the process [described above](#) to add button to search list view layouts.

## ADDING 'ADD TO FAVORITES' BUTTON FOR CUSTOM OBJECTS

- For the custom object repeat the above steps. However, to find the custom object name go to
- Setup > Create > Object > Click on the Object Name > Go to 'Button, Links, and Action' section > Click on 'New Button or Link' > Repeat the steps defined above
- Note:** Make sure to copy the **API Name** from the 'Custom Object Definition Detail' section to replace it in the code.
  - For all custom objects you need to copy the fully API name with name space (if any)
- Edit 'List View' search layout on the object and add the new button

**CODE: 'ADD TO FAVORITES' BUTTON**

- Copy the following code and paste it under custom button code section. Make sure to replace the highlighted object name with new Standard Object Name or Custom API Name for the custom object.

```
{!REQUIRESCRIPT("/soap/ajax/30.0/connection.js")}
{!REQUIRESCRIPT("/soap/ajax/30.0/apex.js")}

//flag check the folder
var IsAnyFolder=false;
//contain the folder name
var FolderName ="All Favorites";
//Contain the folder Id
var folderId="";

//get id of selected Records
var idsToAdd = {!GETRECORDIDS($ObjectType.Account)};

if(idsToAdd.length > 0){
    try{
        var result = sforce.connection.describeSObject("webider_myfav__My_Favorite__c");

        //SAK - Query custom setting and get new value here and alert
        var settingResult = sforce.connection.query("Select Id,webider_myfav__Selected_Folder_ID__c FROM
webider_myfav__MyFav_Folder_Setting__c where SetupOwnerId='{!$User.Id}' limit 1");
        if (settingResult.size > 0) {
            records = settingResult.getArray("records");
            var record = records[0];
            //Get Folder Id From the Record
            folderId = record.webider_myfav__Selected_Folder_ID__c;
            //alert('Btn - from custom setting query >> '+FolderId);
        }

        // alert(folderId);
        //get instance of new Records Array
        var newRecords = [];

        //Hold the Selected Ids
        var SelectedIds = [];
        for(var i=0; i < idsToAdd.length; i++) {
            SelectedIds[i] = ""+idsToAdd[i]+"";
        }
        try{

            var queryResult = sforce.connection.query("Select Id,Name from account where id IN('"+SelectedIds+"') limit
200");

            if (queryResult.size > 0) {
                if (folderId != "null" && folderId != "none"){
                    var FolderResult = sforce.connection.query("Select Id,Name from
webider_myfav__MyFav_Folders__c where id ='"+folderId+"' limit 1");
                    records = FolderResult.getArray("records");
                    IsAnyFolder=true;
                    var record = records[0];
                    FolderName =record.Name;
                }
                var output = "";
                var records = queryResult.getArray("records");
                for (var i=0;i<records.length;i++) {
                    // Creating an instance of the sObject
                    var favObj = new sforce.SObject("webider_myfav__My_Favorite__c");
                    favObj.Name = records[i].Name;
                }
            }
        }
    }
}
```

```

        favObj.webider_myfav_Behavior__c = "Display in existing window";
        favObj.webider_myfav_URL__c = "/" + records[i].Id;
        if (IsAnyFolder){
            //set selected Folder Id
            favObj.webider_myfav_Folder_List__c=folderId;
        }
        //Adding records.
        newRecords.push(favObj);
    }

    var flag = sforce.connection.create(newRecords);
    if(flag){
        alert(records.length+' record(s) bookmarked to My Favorites "' + FolderName + '" folder.
\nPlease click on Refresh icon in the left home page component to see recently added favorites links.');
```

**Please see [User Guide](#) or [MyFav Release Notes](#) for detailed information about New features.**

**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 – [Click Here](#) to Review**

## !!! POST INSTALL STEPS - COMPLETED!!!





**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.**

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