



Sticky Note for Salesforce

User Manual

Overview

The user manual contains each and everything about Sticky Notes like setting up the app and creating, updating, deleting Notes.



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1. Configuration
2. Notes Page
3. Creating , updating , Deleting Notes



Configuration

Sticky notes work with the Objects so first of all we have to create a custom detail button for Sticky Notes Page.

We can create a custom button by **Setup > Customize > Object (Let's say: Lead) > Buttons, Links, and Actions > New Button or Link**.

Well, now we are on **New Button or Link** create page.

A screenshot of the Salesforce 'New Button or Link' configuration page. The page is titled 'Lead Custom Button or Link' and 'New Button or Link'. It has a sidebar on the left with navigation links like 'Home', 'Leads', 'Accounts', etc., and a main content area. The main content area has a 'Custom Button or Link Edit' section with fields for 'Label', 'Name', 'Namespace Prefix' (set to 'asadcc'), 'Description', 'Display Type' (with radio buttons for 'Detail Page Link', 'Detail Page Button' (selected), and 'List Button'), 'Behavior' (set to 'Display in new window'), and 'Content Source' (set to 'URL'). Below this is a 'Select Field Type' section with 'Lead' selected, and an 'Insert Field' section with '-- Insert Merge Field --' selected. There is also an 'Insert Operator' dropdown and a 'Functions' list on the right showing 'ABS', 'AND', 'BEGINS', 'BLANKVALUE', and 'CASE'. A 'Quick Tips' box is on the right side of the main content area.

And now Enter the **Label** and **Name** and pick **Detail Page Button** and **Display in existing window without sidebar or header** [Or you may select other option too]. And then provide the url as shown in the following figure.



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links like 'Salesforce1 Setup', 'Force.com Home', and 'Administer'. The main content area is titled 'Edit Lead Custom Button or Link: Notes'. It includes a 'Custom Button or Link Edit' section with fields for Label, Name, Namespace Prefix, Description, Display Type, Behavior, and Content Source. The 'Display Type' is set to 'Detail Page Button'. A green message 'Save was successful.' is displayed. A 'Quick Tips' box on the right lists links for 'Getting Started', 'Sample Buttons & Links', and 'Operators & Functions'.

URL : /apex/CC_StickyNotes__Notes?id={!Object.Id}

Note: Please change the **Object.Id** with your **youobject.id**. Let's say your object is Lead then the Url will be like this

/apex/CC_StickyNotes__Notes?id={!Lead.Id}

The screenshot shows the Salesforce formula editor. The 'Select Field Type' dropdown is set to 'Lead'. The 'Insert Field' dropdown shows '-- Insert Merge Field --'. The 'Insert Operator' dropdown is set to 'id'. The formula text area contains the URL: /apex/CC_StickyNotes__Notes?id={!Lead.Id}. The 'Functions' panel on the right shows a list of functions including ABS, AND, BEGINS, BLANKVALUE, CASE, and CASESAFEID.

Now save the button. Till now we have created a detail button for our Notes page. Now we will add the button to the object detail page. For that we will go object detail page add this button to the detail page layout



Dinner

Lunch

Recycle Bin

There are no updates.

Back to List: Pages

Open Activities (0) | Activity History (0) | Campaign History (0) | HTML Email Status (0)

Lead Detail

Edit | Delete | Convert | Clone | Find Duplicates | Notes | Draw Attachment

Lead Owner	asad dev (Change)	Phone	(850) 644-4200
Name	Ms. Bertha Boxer	Mobile	
Company	Farmers Coop. of Florida	Fax	(850) 644-4300
Title	Director of Vendor Relations	Email	bertha@fcof.net
Lead Source	Web	Website	
Industry	Agriculture	Lead Status	Working - Contacted
Annual Revenue	\$900,750,000	Rating	Hot
		No. of Employees	
Address	321 Westcott Building Tallahassee, FL 32306 USA		
Product Interest	GC5000 series	Current Generator(s)	All
SIC Code	2768	Primary	Yes
Number of Locations	130		
Created By	asad dev 11/19/2014 9:28 AM	Last Modified By	asad dev 11/19/2014 9:28 AM
Description			

Edit | Delete | Convert | Clone | Find Duplicates | Notes | Draw Attachment

Finally we have button on our object [Lead] Detail page. By click on the button we can go to Notes page.

Notes Page

Notes page is the place where you can view all notes, create, update and delete notes.

ACCOUNT

Notes

New | Back to Record

Powered By
Cloud Certitude Pvt Ltd

aaasas

##

Testing

Untitled

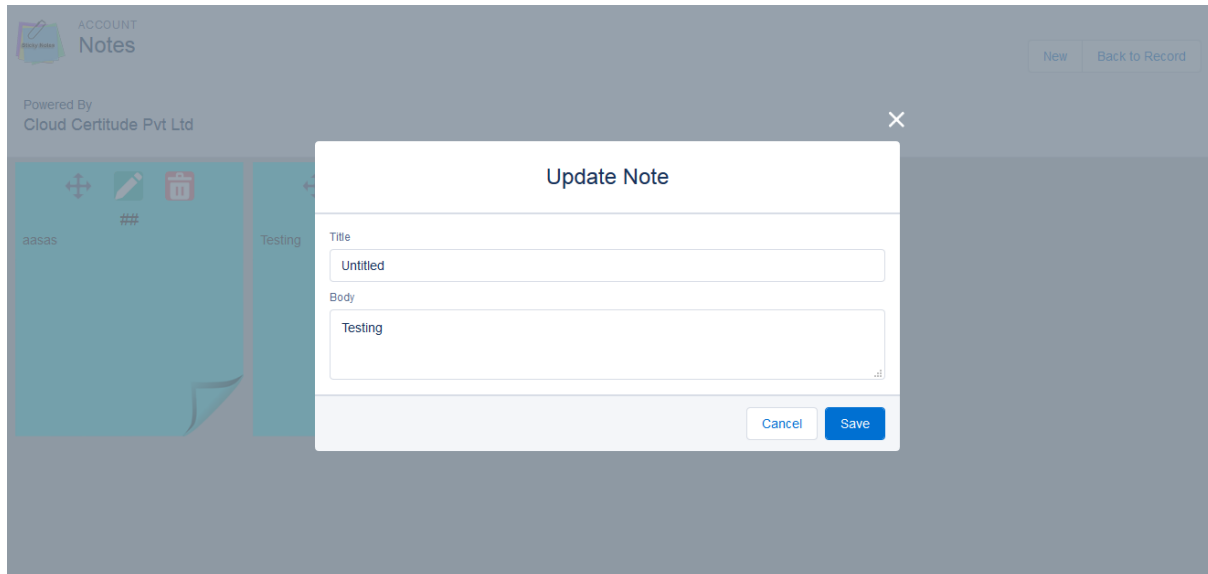


Creating, Updating and Deleting Note

1. Creating Notes

A screenshot of the Cloud Certitude Notes application interface. The background is a dark grey. In the top left corner, there is a logo with a notepad icon and the text "ACCOUNT Notes". Below this, it says "Powered By Cloud Certitude Pvt Ltd". In the top right corner, there are two buttons: "New" and "Back to Record". On the left side, there is a sidebar with a teal background. It contains a notepad icon, a pencil icon, and a calendar icon. Below these icons, the text "aaasas" and "Testing" are visible. A "Create Note" dialog box is open in the center. The dialog box has a white background and a grey border. It has a title bar that says "Create Note" with a close button (X) in the top right corner. Inside the dialog box, there are two input fields: "Title" and "Body". The "Title" field contains the text "Untitled". The "Body" field is empty. At the bottom right of the dialog box, there are two buttons: "Cancel" and "Save".

2. Update Note



3.

