PopUps for Lightning User Guide

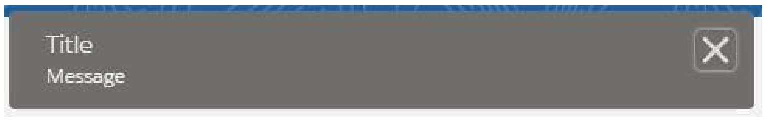
v 1.7 Rev. 2

The **PopUps** component allows the user to add criteria-based pop-up notifications on a record for standard and custom objects, Home pages, or Community pages, without having to write any code.

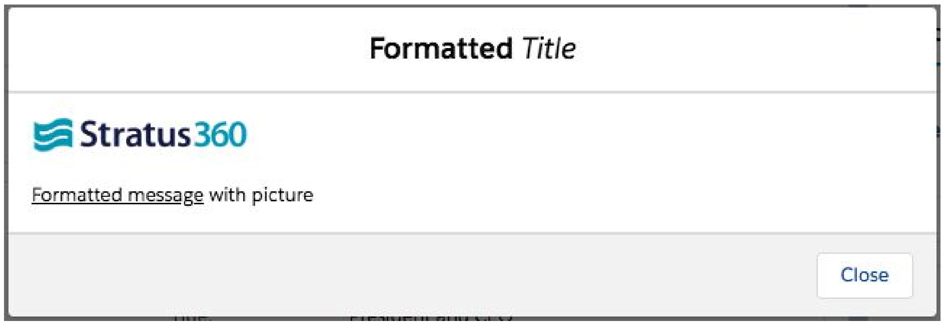
The pop-up will appear upon opening a record, Home, or Community page, and is customizable according to custom fields and/or expiry date.

There are three types of PopUps:

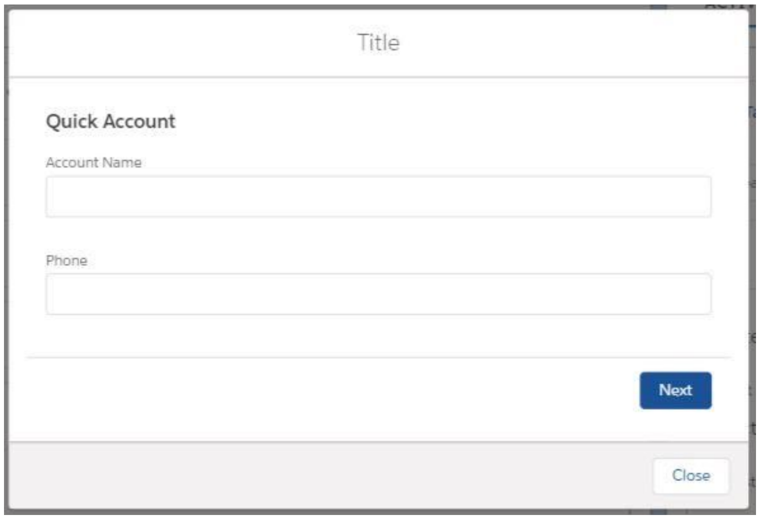
1. Toast



2. Modal

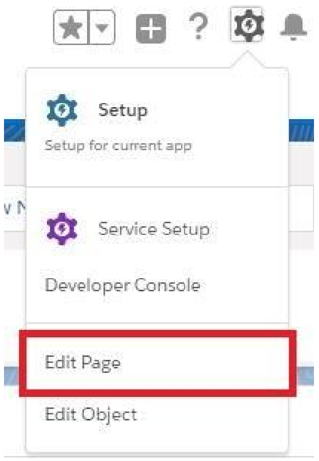


3. Flow

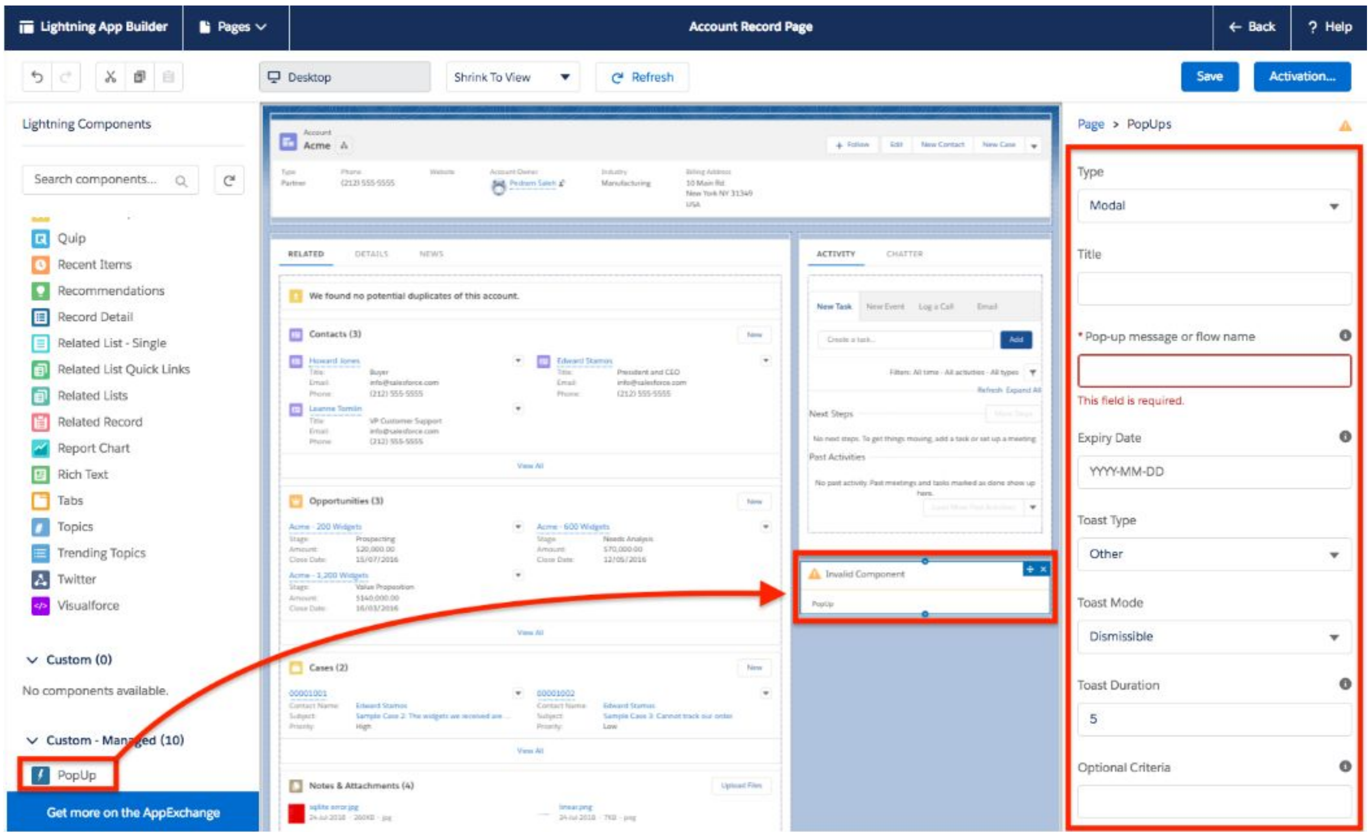


Adding the component to a record, Home, or Community page

On a Salesforce record page, click ⚙ and select **Edit Page**. Alternatively, open the page that you want to add the PopUp component to in Community Builder.



Drag and drop the **PopUp** component to the page. In this example, we are adding a pop-up to an Account record.



Type: Modal

Title:

* Pop-up message or flow name:

This field is required.

Expiry Date: YYYY-MM-DD

Toast Type: Other

Toast Mode: Dismissible

Toast Duration: 5

Optional Criteria:

Parameters

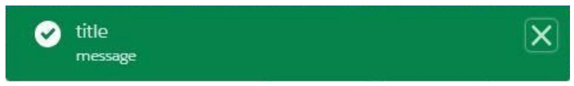
Type: Toast, Modal or Flow (as described above)

Title: The title that will be displayed on the pop-up.

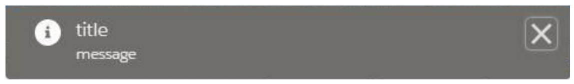
Pop-up Message or Flow Name: If your pop-up type is Modal or Toast, this is the message to be displayed. If your pop-up type is Flow, this is your Flow API Name.

Toast Type: Success/Info/Other/Warning/Error
(Default: Other)

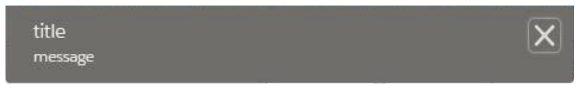
Success



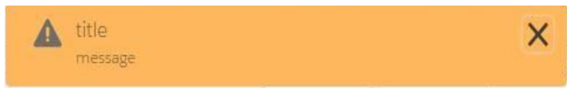
Info



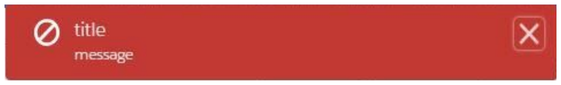
Other



Warning



Error



Toast Mode:

- Dismissible: Remains visible until you press the close button or the duration has elapsed.
- Pester: Remains visible until the duration has elapsed. Close button will not appear.
- Sticky: Remains visible until you press the close button.

Default: Dismissible if no value entered

Toast Duration: The duration the toast pop-up will remain visible, in seconds. The minimum value is 5 seconds.

Default: 5 seconds if no value entered

Note: It is recommended to keep words displayed no longer than 50 characters, as long words without spaces (e.g. URLs) can cause rendering issues, depending on the width of the window.

Optional Criteria: The API name of a field on your object that determines whether the pop-up will show or not. The field **must** be of either type: **Checkbox** or **Formula (Checkbox)**. Using Formula (Checkbox) can enable the pop-up via multiple conditions.

If this parameter is empty, the pop-up will always appear.

Expiry Date:

The date must be filled in as YYYY-MM-DD format (e.g. February 1st, 2019 is 2019-02-01).

If this parameter is empty, the pop-up will never expire.

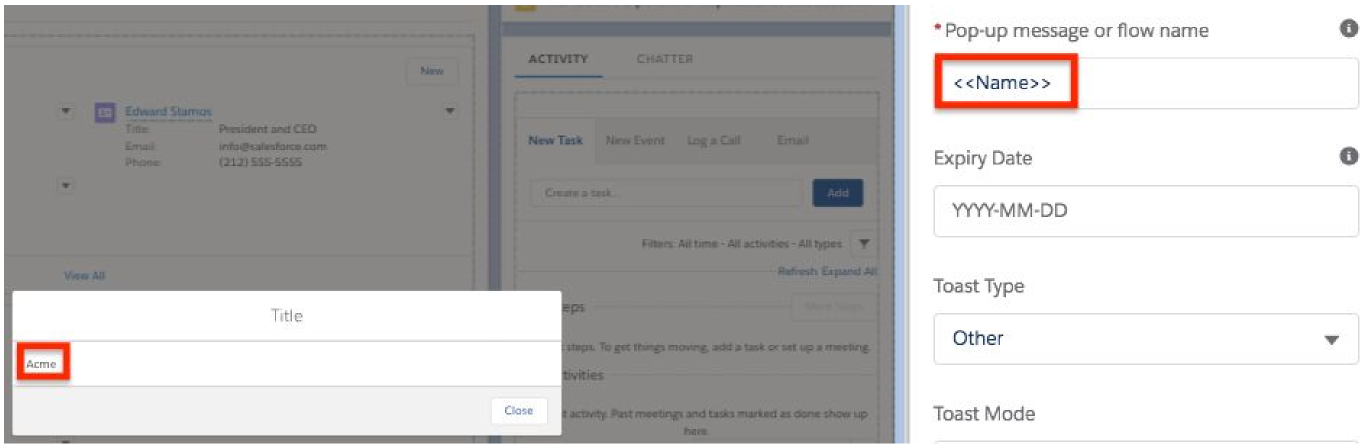
Note: The expiry time is 00:00:00 (12:00 AM). This cannot be changed by the user.

Text Formatting

When using a **modal type**, HTML tags (e.g. bold, italic, underline) are supported in the title and message, because PopUps makes use of the Salesforce Output Rich Text component. For documentation on which tags are supported, see the official Salesforce documentation here.

Dynamic Parameters

The **Pop-up Message or Flow Name** and **Title** fields can be filled with <<*Field API Name*>> instead of plain text, which refers to the API name of a field in your object. The field **must** be of type **Text**. In the example below, the standard *Name* field was used, however custom fields can be used as well. You cannot mix regular text with a field name. If adding the component to a Community page, **it must be the page of a Salesforce Object if you reference a field**.



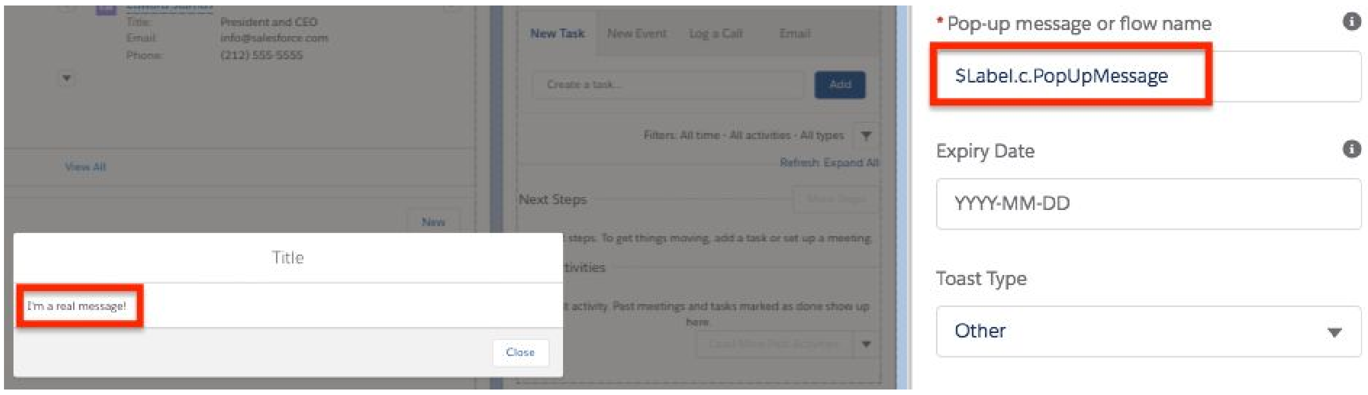
* Pop-up message or flow name: <<Name>>

Expiry Date: YYYY-MM-DD

Toast Type: Other

Toast Mode

The title and message fields can also be filled with $Label.c.*LabelName* * instead of plain text. *LabelName* refers to the name of a label in your custom labels. The example below uses the custom label PopUpMessage, which also contains the text “I’m a real message!”. You cannot mix regular text with a Custom Label.



* Pop-up message or flow name: $Label.c.PopUpMessage

Expiry Date: YYYY-MM-DD

Toast Type: Other

This can be useful for multilingual support, since it allows to display translated text in various languages, according to the user's Salesforce language settings.

Note: $Label.c.*LabelName* that contains <<*FieldName*>> will work, but a field that contains a custom label will not work.

* You can also replace the "c" in the custom label with the org's namespace.

Passing a Variable to a Flow

PopUps supports passing the record ID of the record being displayed to the flow. The flow must accept *recordID* as its parameter.

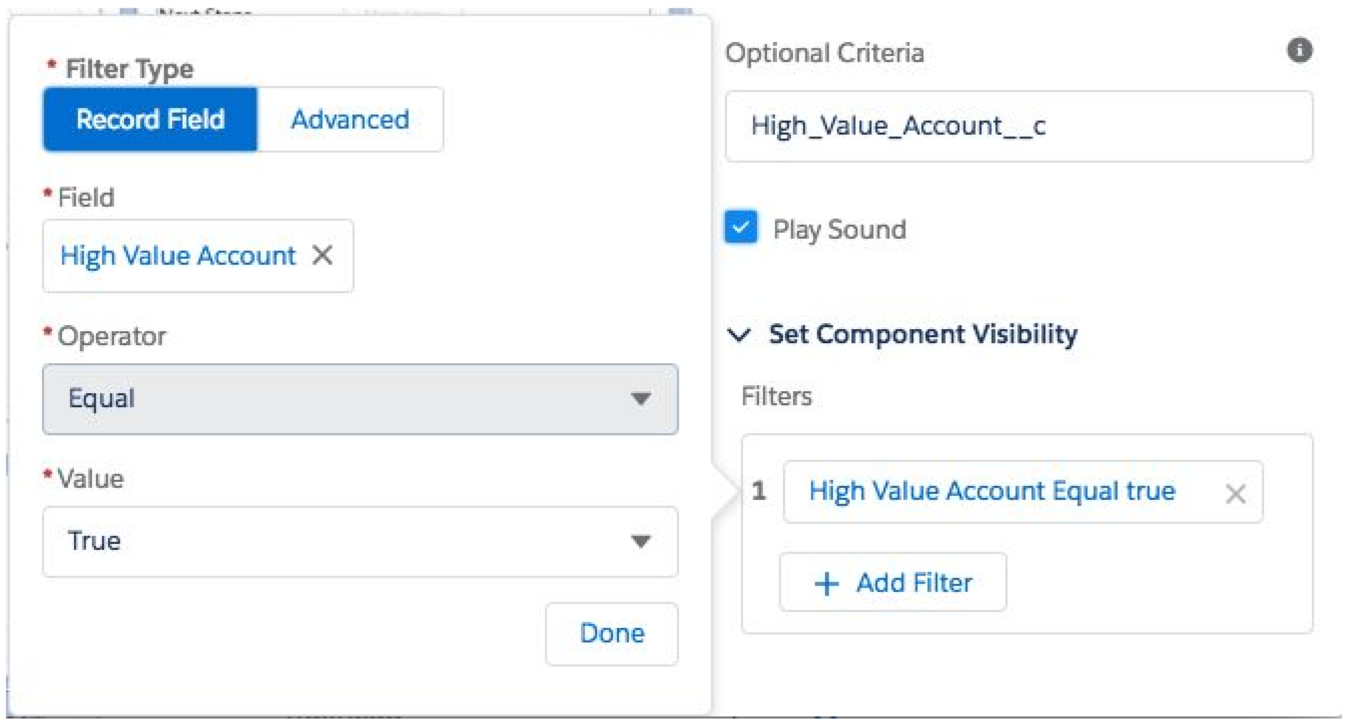
The recordId variable can be created in the Flow Builder. Click the textbox in which you would you would like to reference the variable. Select New Resource from the dropdown. Select **Variable** for Resource Type. Give the variable the API name "**recordId**" (use this exactly). Set the Data Type to **Text**, and check the checkboxes for both **Available for input** and **Available for output**.

Once you have created this variable, you can reference it anywhere in the flow as {!recordId}.

Evaluating Criteria on Save

Normally the criteria to show the desired notification is evaluated on page load. However, if a filter is applied to the component then changes to fields on the page can cause the component criteria to be re-evaluated and the pop-up to potentially show on save.

The example below causes a pop-up to display on save if the revenue of an account is greater than a certain value. The same kind of technique can also be used for soft validation of fields, which displays a notification if the input is not within the acceptable range.


* Filter Type: Record Field | Advanced
* Field: High Value Account
* Operator: Equal
* Value: True
Done

Optional Criteria: High_Value_Account__c
Play Sound ✓
Set Component Visibility
Filters
1 High Value Account Equal true
+ Add Filter

Glossary

Flow: A flow is an application that can execute logic, interact with the Salesforce database, call Apex classes, and collect data from users.

Modal: Modals are a more advanced way of interacting with users. Modals are used to display content in a layer above the app. Unlike toasts, modals focus user interactions by applying an overlay over the screen. Modals are more versatile as they can display a long message, act as a confirmation dialog, capture data with a form, or display a loading message such as file upload progress.

Toast: Toasts are the simplest form of notification a developer can use to display a notification dynamically. They are used to provide basic user feedback with a limited amount of text. Unless set to "sticky" mode, they are displayed for a limited duration and don't block user interactions.

Note: For additional support not addressed in the user guide, please visit the PopUps Partner Support group.