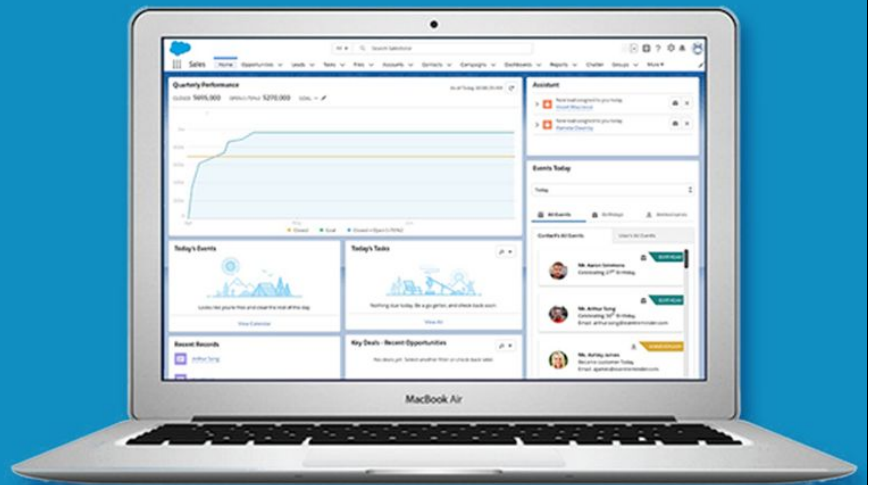


salesforce



Ksolves Event Reminder



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1. About Ksolves Event Reminder

Ksolves Event Reminder keeps a track of all the upcoming events in your org. Right from the user's birthday to the client's association anniversaries, it keeps you informed of every upcoming event.

Salient features of the app include:

- The component could be placed at any desired portion of any page.
- Currently, the component keeps track of the following events:
 - User's Birthday
 - User's Work Anniversary
 - Contact's Birthday
 - Contact's Association Anniversary
- The component comes with 4 filters namely 'Today', 'This Week', 'This Month', 'This Quarter'. The selected filter displays the events which fall in the selected filter.
- The filter could further be fine-grained, based on user & contact for a specific event(Birthday or anniversary)
- The 'All Event' filter includes the tag of the event on each card to make the event easily identifiable.
- The event details include the event date, the day on which the event falls.
- The displayed event cards are made clickable, clicking on which opens the detail page of the respective user/contact.
- The component comes with a functionality to auto send email wishing the concerned person on his/her birthday or anniversary. The admin can schedule at which time the email needs to be sent.
- The auto send email functionality comes with four predefined templates which could be customized. Templates include Birthday template & Work Anniversary template for user and Birthday template & Contact association anniversary template for contact.

2. List of Components Used

Component Type	Name	Purpose
Aura Component Bundle	DisplayEvent	The component where the main business logic resides. This component needs to be embedded to the page where you want the Ksolves Event Reminder to work.
Custom Field	• 'KSER__JoiningDate__c' on Contact Object.	Custom field to store the date on which the contact associated with the organization. This field is used to determine the contact association anniversary.
	• 'KSER__Birthdate__c' on User Object.	Custom field to store the birth date of the user. This field is used to determine the birthday of the user.
	• 'KSER__JoiningDate__c' on User Object.	Custom field to store the joining date of the user. This field is used to determine the work anniversary of the user.
Apex Class	ScheduledJobForSendingEmail	Schedule this Apex class to send the event wish emails automatically to the concerned person.
Email Template	Contact Anniversary	Email template used while auto sending email to contact on their association anniversary.
	Contact Birthday	Email template used while auto sending email to contact on their birthday.
	Work Anniversary	Email template used while auto sending email to the user on their work anniversary.

	User Birthday	Email template used while auto sending email to the user on their birthday.
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3. Setting up the component

After successful installation of the package, the component would need to be put on the desired page. The component named **'DisplayEvent'** needs to be put on the desired page.

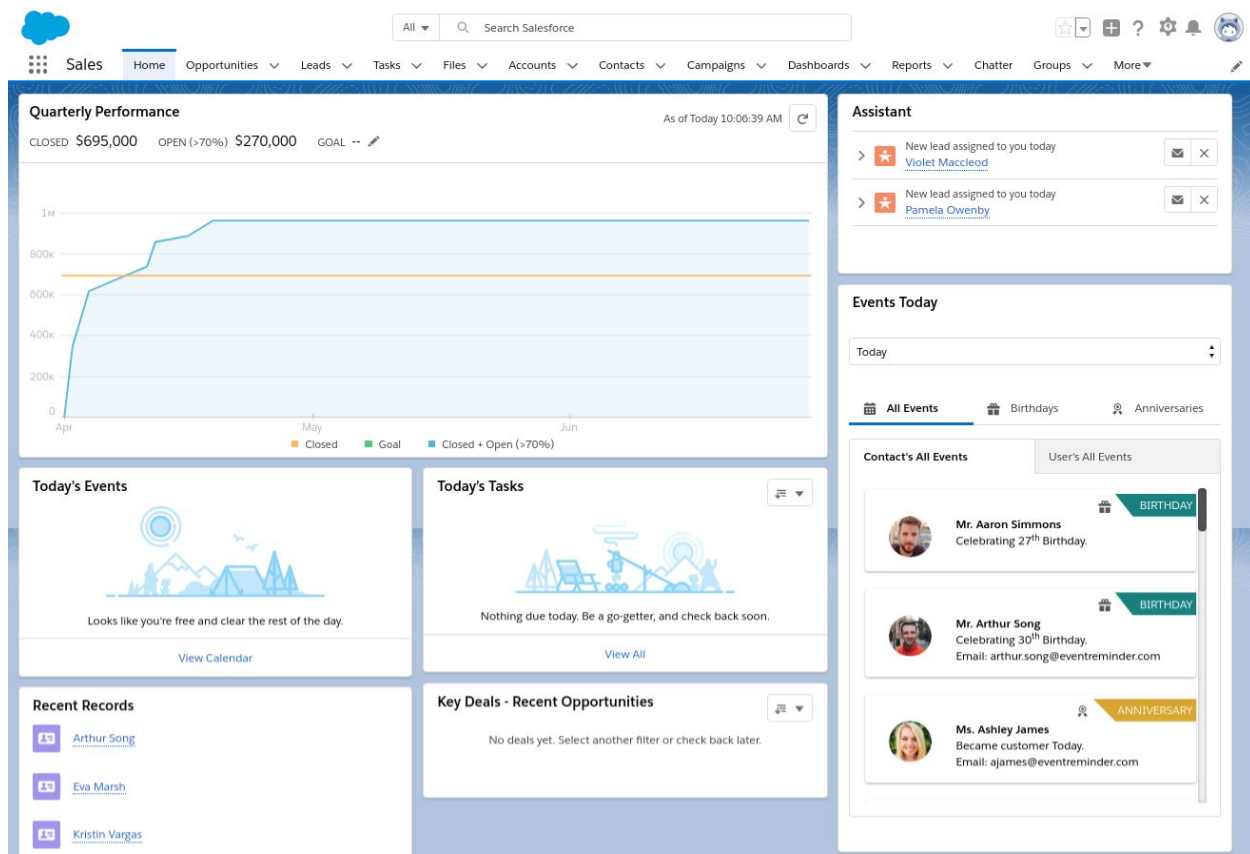
Here is an example to put 'DisplayEvent' component on the HomePage of the app. Follow the steps below to embed the component to the home page:

1. Open Setup. Click on 'setup for current app'.
2. Under 'User Interface', click on 'Lightning App Builder'.
3. 'Lightning App Builder' page would open. Click on 'New' in 'Lightning Pages' section.
4. 'Click a New Lightning Page' would pop up.
5. Select 'Home Page' & click on Next. (App Page or Record Page could also be selected depending upon where you want to place the component.)
6. Give a suitable label. We have given it as 'Event Reminder'.
7. Choose a page template or clone salesforce default page. We have cloned salesforce default page. Click on the 'Finish' after you are done selecting the page template.
8. Drag the component 'DisplayEvent' to the place where you want it to be displayed on the page.

You could also add the component to the current page by following these steps:

1. Click on the setup and then click 'Edit Page'.
2. This would open the current page layout in the Lightning App Builder.
3. Drag and drop the 'DisplayEvent' component to the place where you want it to be displayed on the page.

Here is a look at the sales home page where we embedded the component:



Similar steps could be followed to embed the component on some different page.

4. Adding custom fields to the contact & user detail page.

The component uses one custom field on Contact object named as '**KSER__JoiningDate__c**' to store the date on which the contact got associated with the organization and two custom fields on User object named as '**KSER__Birthdate__c**', '**KSER__JoiningDate__c**' which stores the birth date and the date on which the user joins the organization respectively.

These custom fields might not be visible at first on the contact's & user's detail page. In order to make those fields visible, you need to add them to the layout of the contact & user detail page.

Following are the steps to add the custom fields to the user detail page layout:

1. From setup, open Object Manager.
2. Search for 'User' object and open it.
3. From the side menu, select 'User Page Layouts'. Click on the 'User layout' layout name.
4. Select the 'Fields' menu. Drag and drop the 'Birthdate' & 'Joining Date' fields under the 'Additional Information' header.
5. Click on the save button on the top to save the layout.

This will make the fields visible on the user detail page.

Similar steps could be followed to make the custom fields of the 'Contact' object visible on its detail page.

5. Scheduling job for auto-sending email

Ksolves Event Reminder comes with a feature to auto send the email at a specified time wishing the concerned person of his/her birthday or anniversary. The component looks for the events occurring on that day and automatically sends them to the concerned contact/user email id. The name of the class which needs to be scheduled for this purpose is **'ScheduledJobForSendingEmail'**.

Follow the steps below for scheduling the class:

1. From setup, click on 'Apex Classes' under 'Custom Code'.
2. This page will list all the Apex classes present in your org. Click on the 'Schedule Apex' button on the top of the list.
3. This will open the 'Schedule Apex' page. Specify some 'Job Name' & specify 'ScheduledJobForSendingEmail' as Apex Class.
4. Fill in the 'Schedule Apex Execution' box specifying the frequency, start & end date and preferred start time fields. This will determine the time & the days on which the scheduled job will run.

5. Once all the fields are populated, click on 'Save' button. This will schedule the job to run at the specified time.
6. This job would be listed in the 'Scheduled Jobs' page (Setup -> Environments -> Jobs -> Scheduled Jobs). You can edit or delete this scheduled job from here.

6. Editable Email Templates

The auto send email exploits 4 different email templates namely, '**Contact Anniversary**', '**Contact Birthday**', '**Work Anniversary**' & '**User Birthday**' which contains the content of the email sent of Contact's association anniversary, Contact's birthday, User's work anniversary & User's birthday respectively.

The templates come with predefined content for email which could be customized. You can view the existing content & edit them by following the below-mentioned steps:

1. From setup, open 'Classic Email Templates' under 'Email'.
2. Select the '**Wishes**' folder and click on the 'Email Template Name' you want to edit/view.
3. The existing content of the email template would be visible here. You could either edit its' HTML version or its' text version by clicking on the buttons on the top.
4. Once the customization is done & the new content is saved, you could send a test email to verify if the merge fields (if any) in the email template works correctly.

7. Support

Need help with Ksolves Event Reminder? Have questions? Have a feature you'd like to see included? Drop us a line, we would love to hear from you.

Ksolves is continually working on improving our products and your feedback is critical to that process. We appreciate hearing details about what is or isn't working for you or ideas you have for how to make the app better. Please contact us at sales@ksolves.com.