Notification App - Details

Highlights

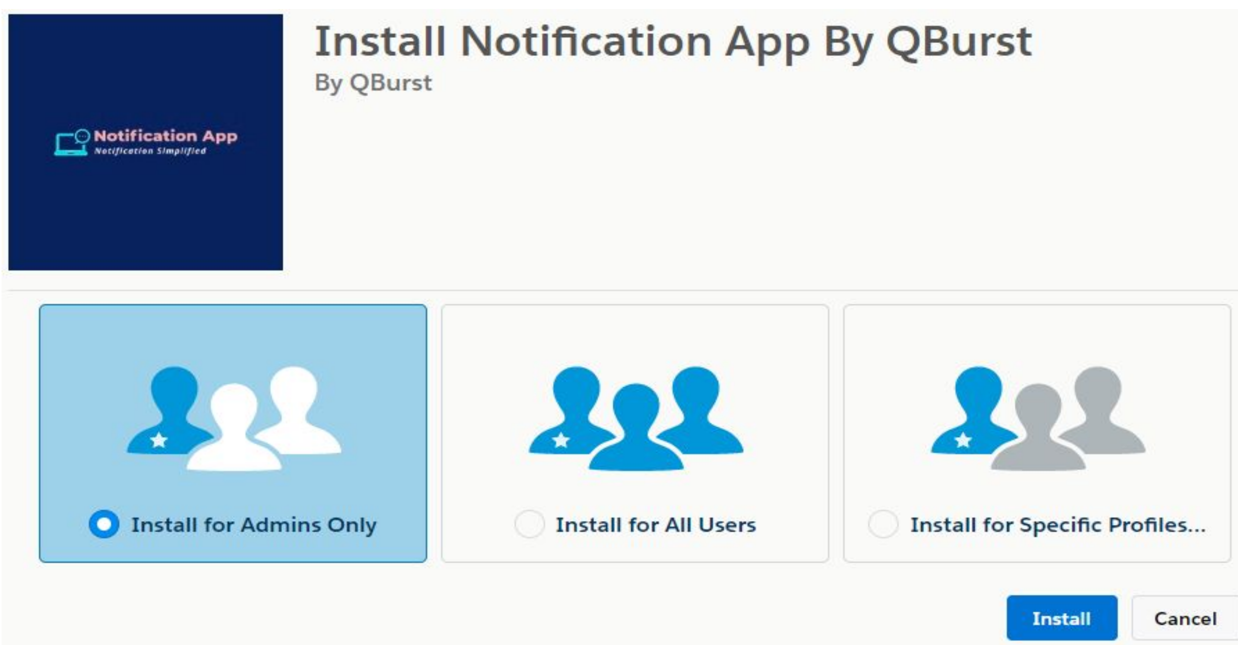
Notification App by QBurst provides a user-friendly Notification process. This enables the users to set up notifications with just a simple setup in UI with no technical dependency. It provides additional features over existing Salesforce notification system, like

- Notification display on record pages of standard objects (only Accounts, Contacts, Cases and Opportunities in free version)
- Notification display on any custom objects (to be implemented in Paid version)
- Multiple notification display on a single record page
- Customize position of the display on record
- Easy set up of notification using a simple UI.

Installation Steps

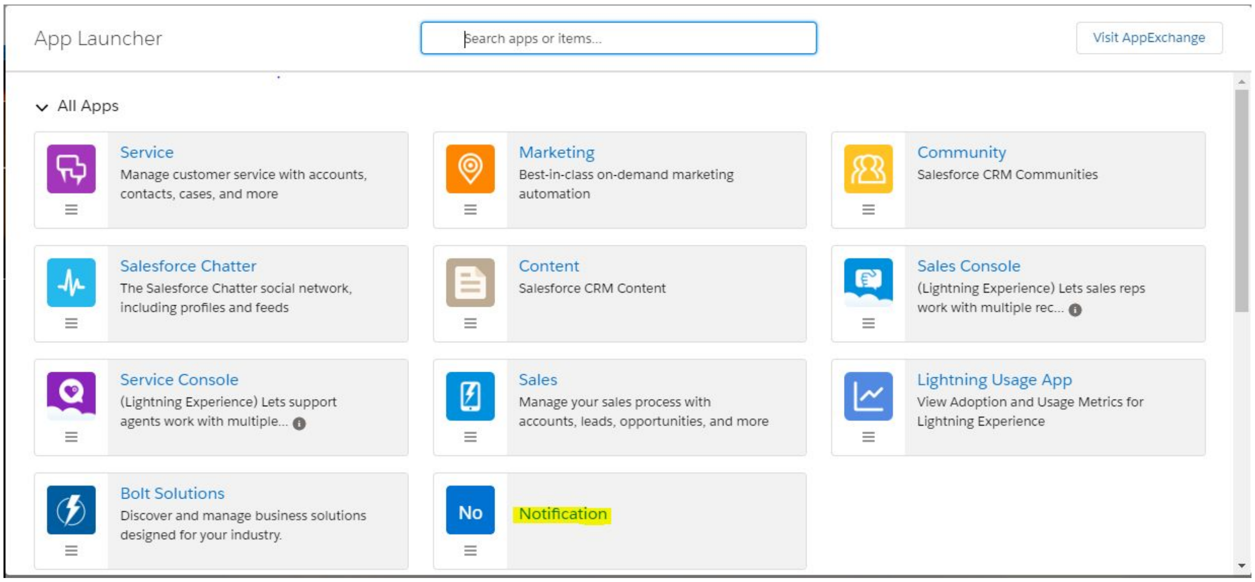
Go to App Exchange and type 'Notification App By QBurst' in Search and select to install.
Install the Notification app link to the salesforce organization.

Please login into the salesforce, Once logged in will see below image

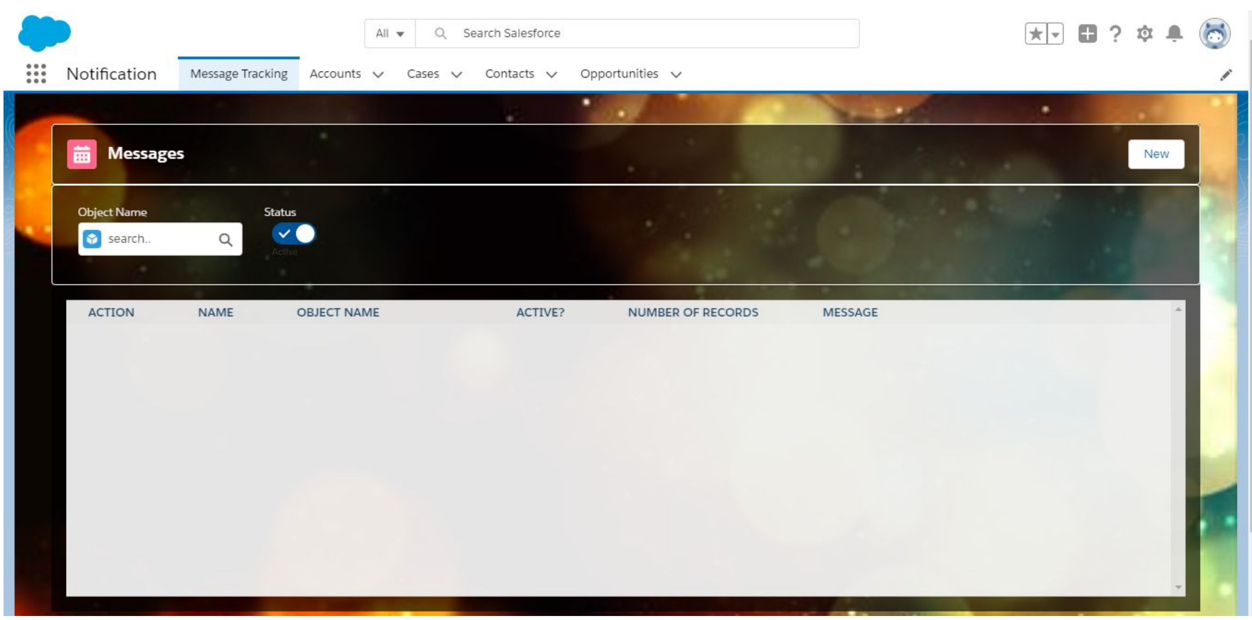


Select Install for All Users and Click Install. It will validate and install the app.
Click Done.

Switch to Lightning Experience.
Select the Notification app from the App Launcher, see below screenshot

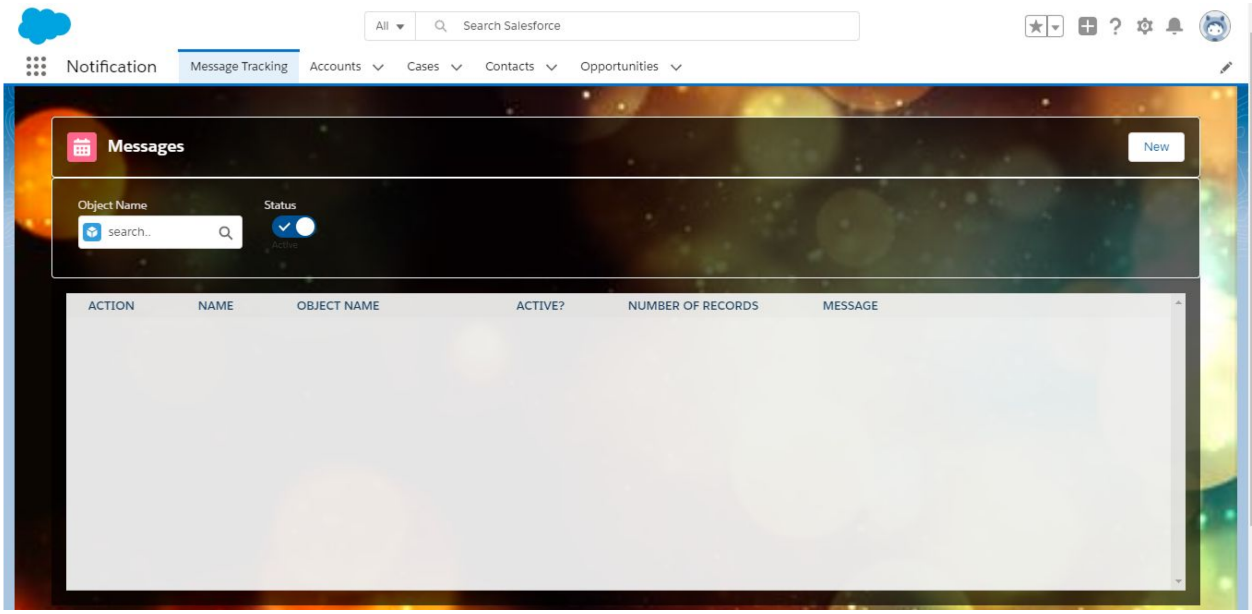


Once the Notification app is selected, you will see the below image as a dashboard.



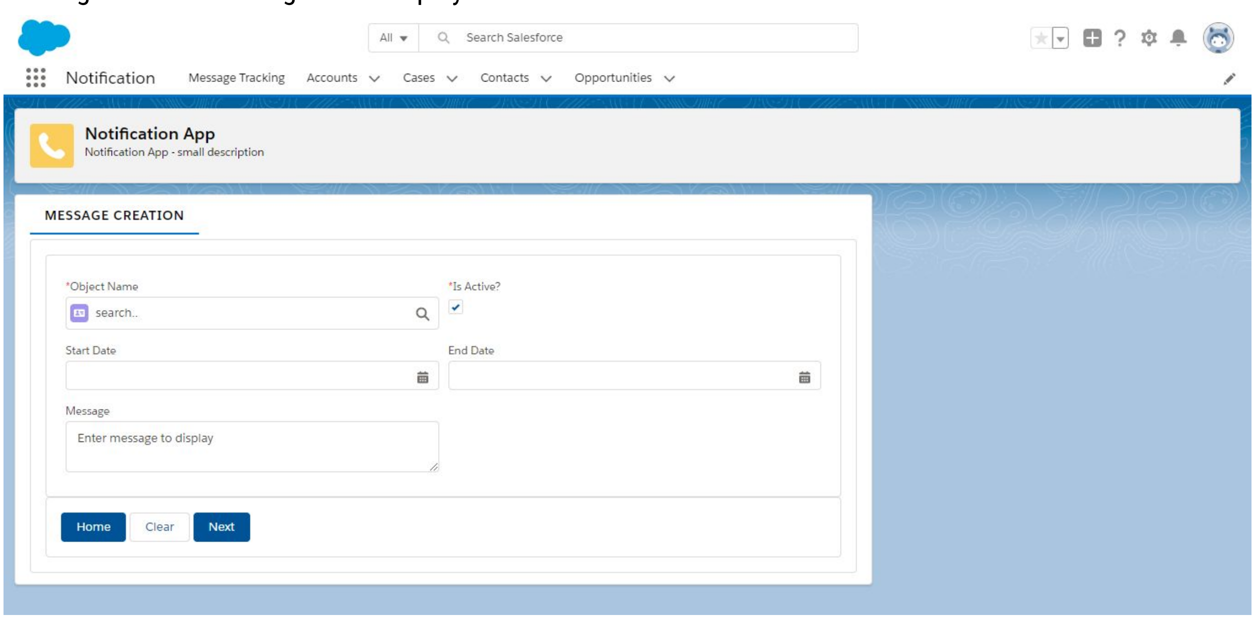
Using the Notification App

Click the New button on the right corner of the dashboard, see below image

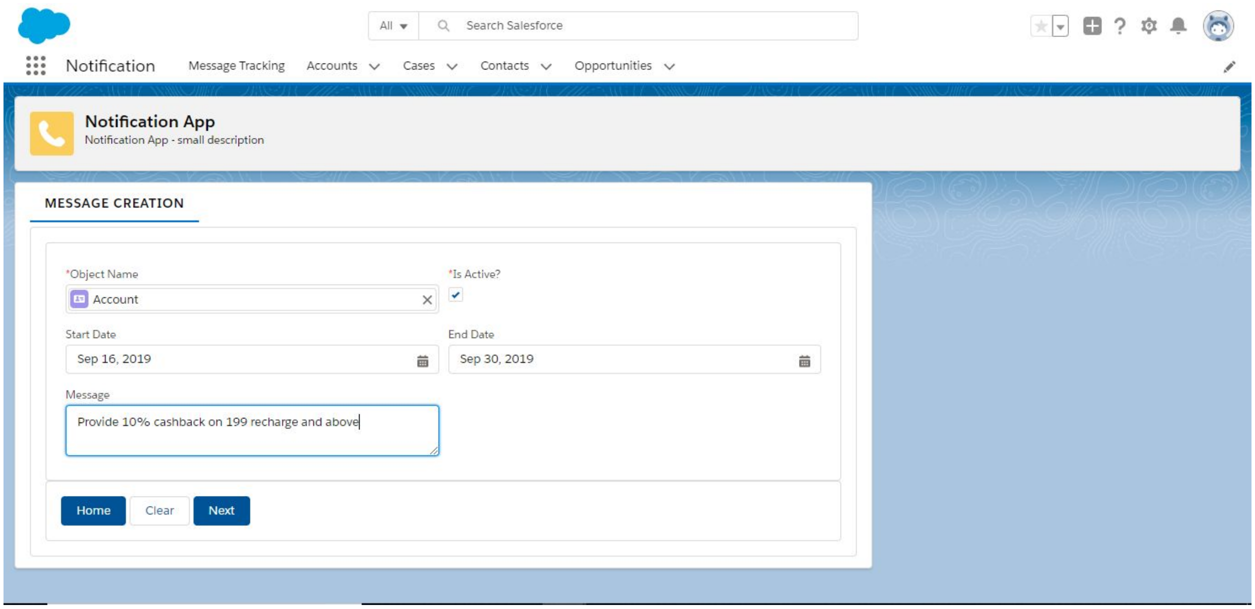


Message Creation

On clicking the new button, the following screen appears. Enter the following details:
Object Name - Object on which you want your notification to display on its record page.
Is Active - select notification display to be active or inactive.
Start Date, End Date - Validity of the notification display.
Message - Actual message to be displayed as notification on the records.



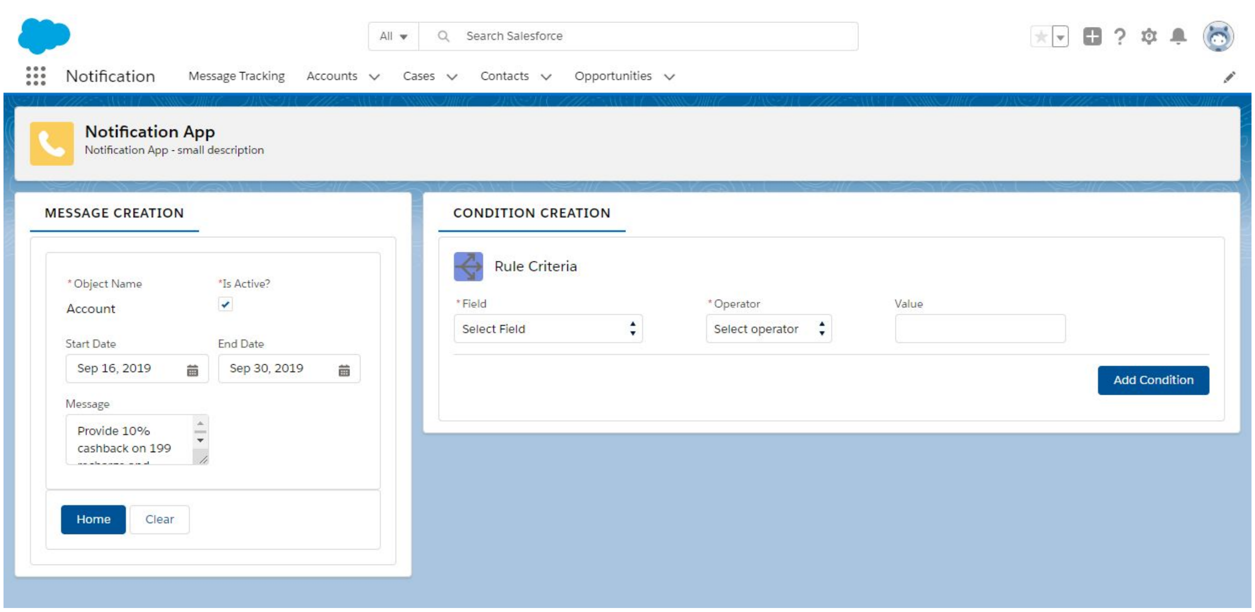
After filling the details, click Next button as shown below



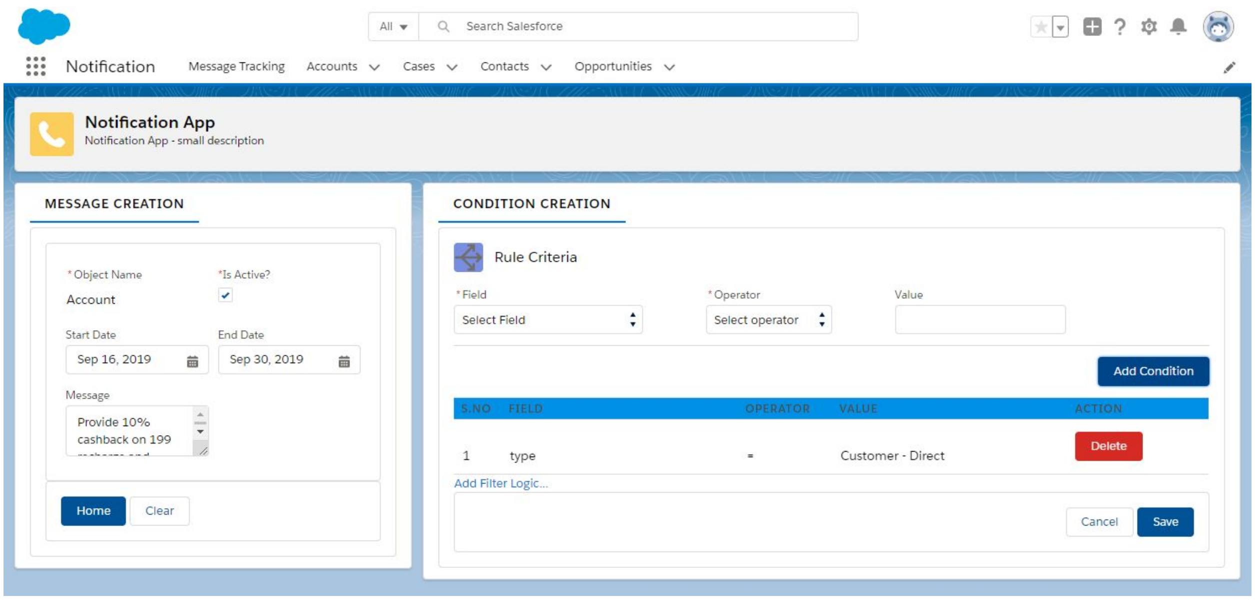
Condition Creation

On clicking next, the following screen appears. Fill the following details in the condition creation section,

Field - Select the field to specify the condition on. (eg. Account Type)
Operator - select the operator. (eg. Equals)
Value - Set the value to match the condition on record. (eg. Customer-Direct)

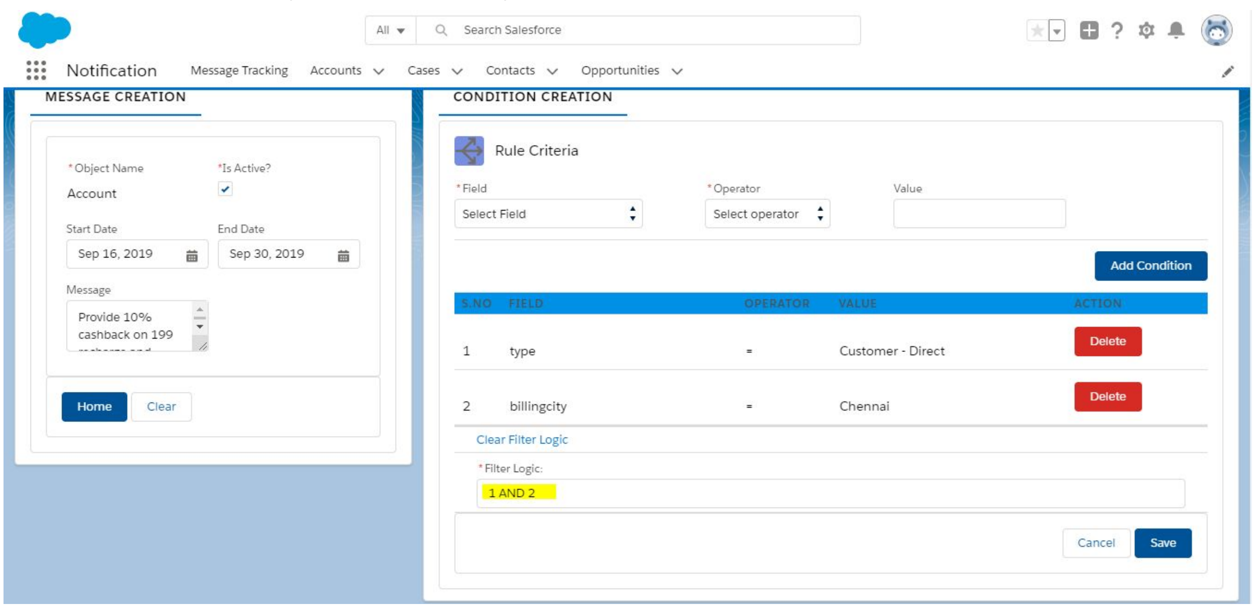


After entering the fields, Click the Add Condition button. Following screen appears showing the condition added below.



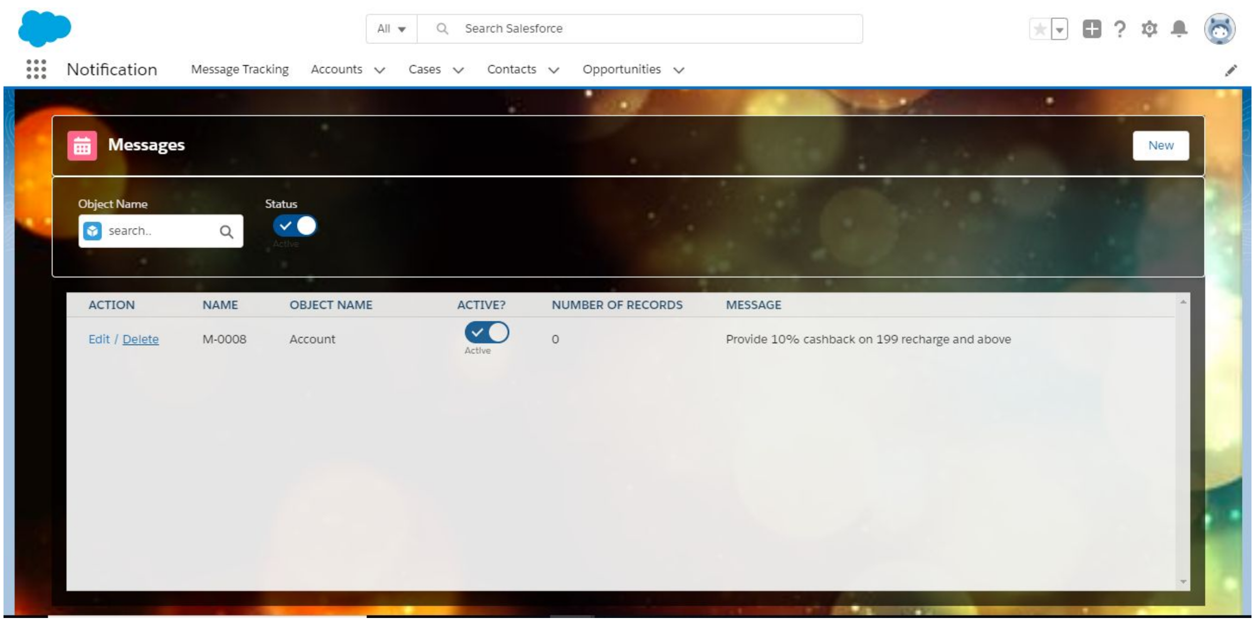
If additional conditions to be added, enter the new values in the fields again and click the Add Condition button.

Click on the Add filter Logic to set up the logic of the conditions and click Save.



On clicking save, the following notification record is created and displayed in the dashboard as shown below.

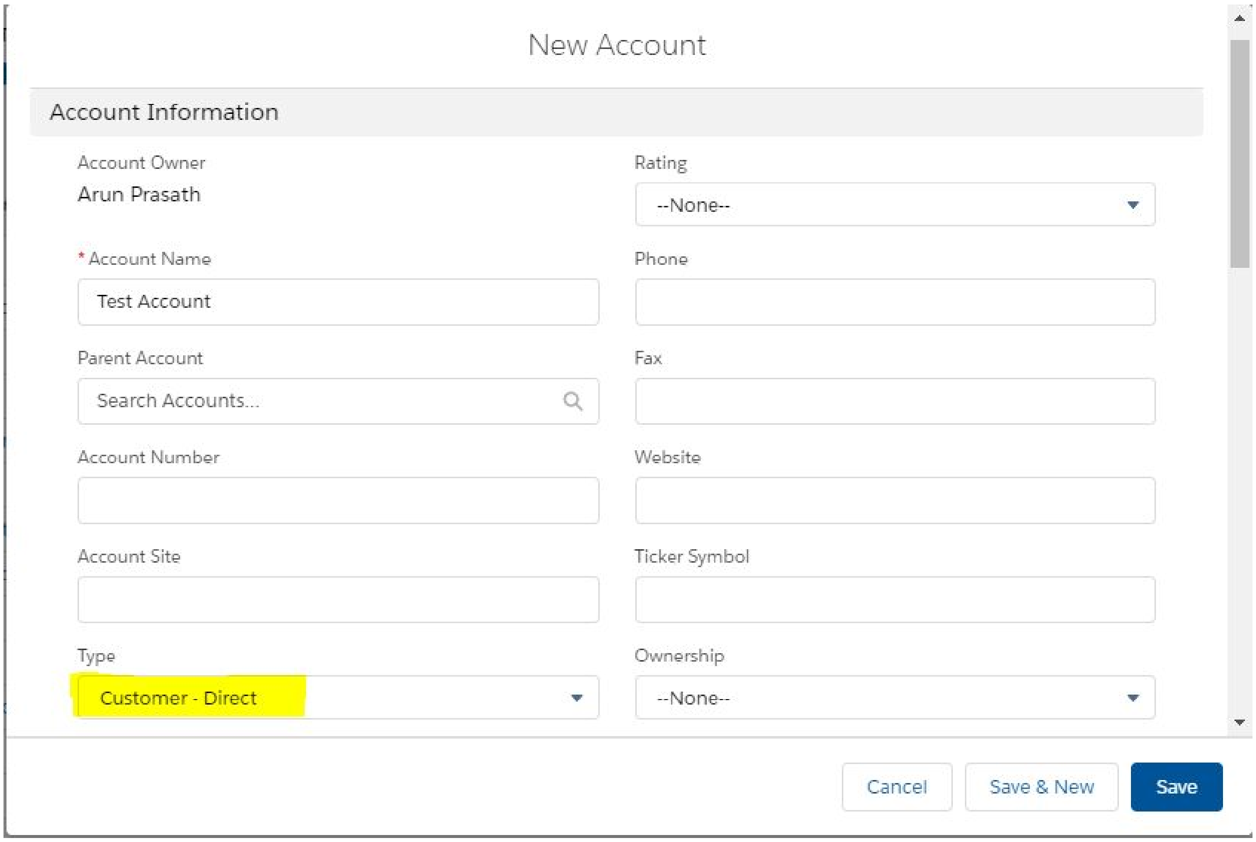
Dashboard

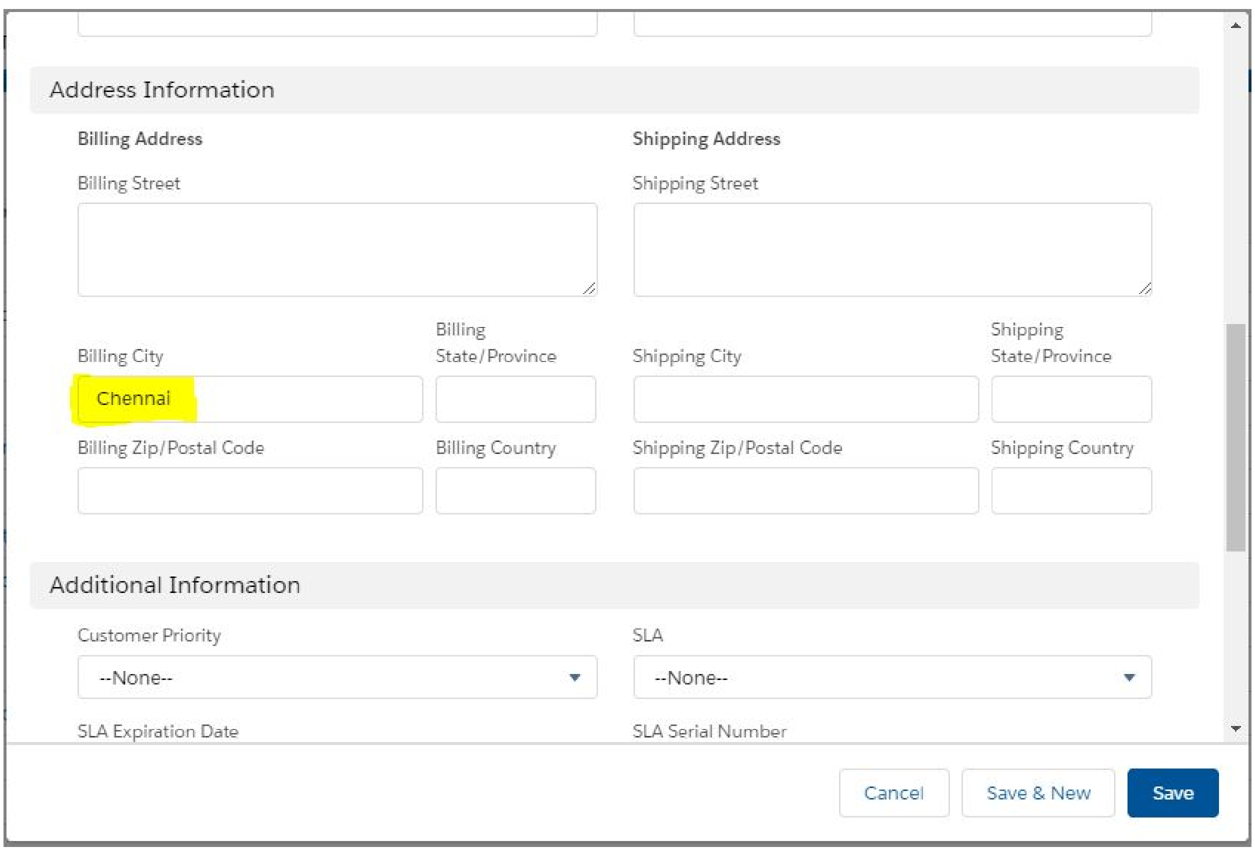


Two operations are available at dashboard.

1. Users can Edit, Delete and toggle between active and inactive by clicking on the respective actions on the dashboard.
2. Users can Filter the notifications created using Object name and Status Filters.

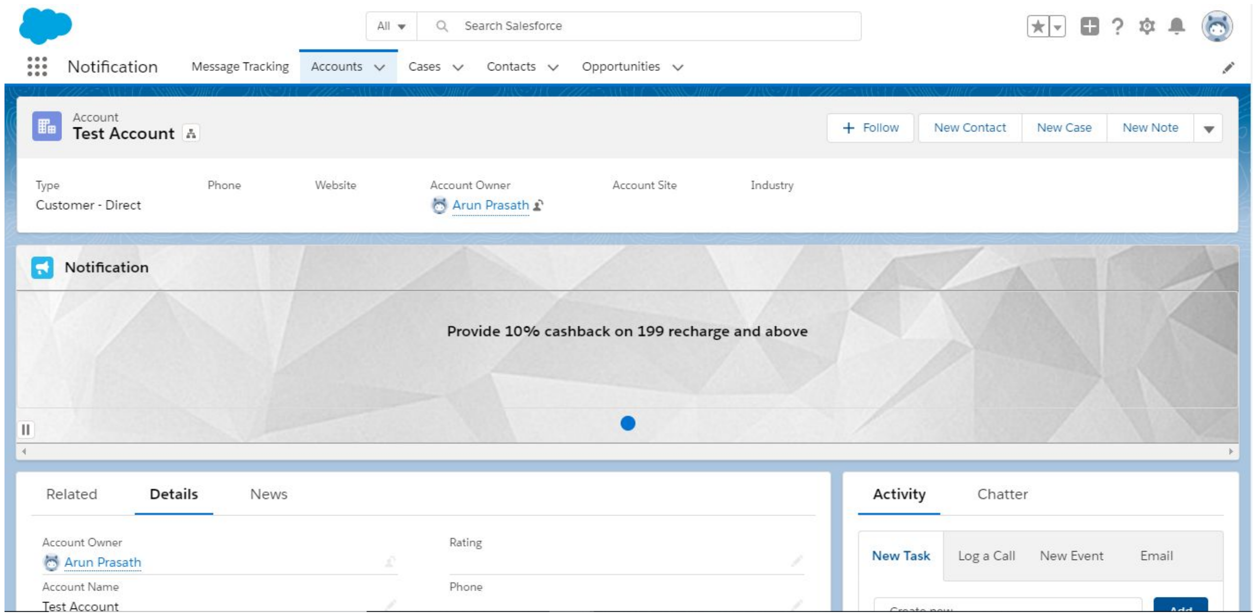
Now that the notification is set up, the column 'No. of records' will show the number of records matching the conditions created and display the respective notifications on matching records. (eg. An account record having the Account type as Customer-Direct and Billing city as Chennai will get the notification displayed on the record page as shown below).


New Account
Account Information
Account Owner
Arun Prasath
Rating
--None--
* Account Name
Test Account
Phone
Parent Account
Search Accounts...
Fax
Account Number
Website
Account Site
Ticker Symbol
Type
Customer - Direct
Ownership
--None--
Cancel
Save & New
Save


Address Information
Billing Address
Shipping Address
Billing Street
Shipping Street
Billing City
Billing State/Province
Shipping City
Shipping State/Province
Chennai
Billing Zip/Postal Code
Billing Country
Shipping Zip/Postal Code
Shipping Country
Additional Information
Customer Priority
--None--
SLA
--None--
SLA Expiration Date
SLA Serial Number
Cancel
Save & New
Save

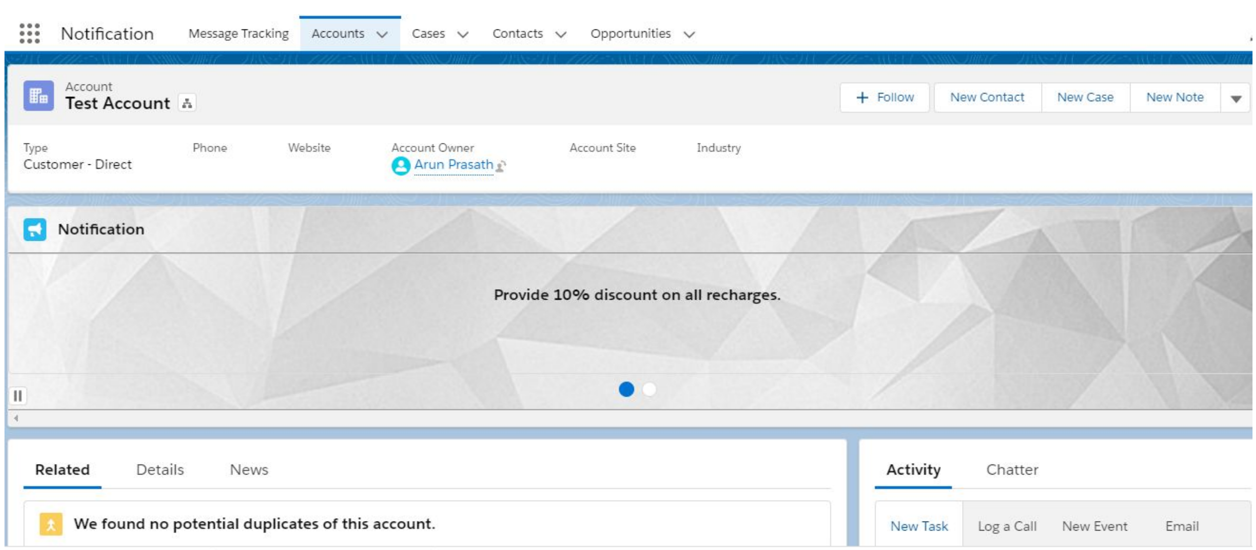
Notification Display(Please refer to the ‘One Time Configuration’ section below to get the notification displayed)

Set notification is displayed on the record page as shown below.



Also multiple notifications on the same record will also be displayed on matching the condition with the record's data.

Screenshot below with Multiple notification’s condition matches with the data set in the same record is displayed with a carousel.



Size and Location of the notification can be customised as per user preference.

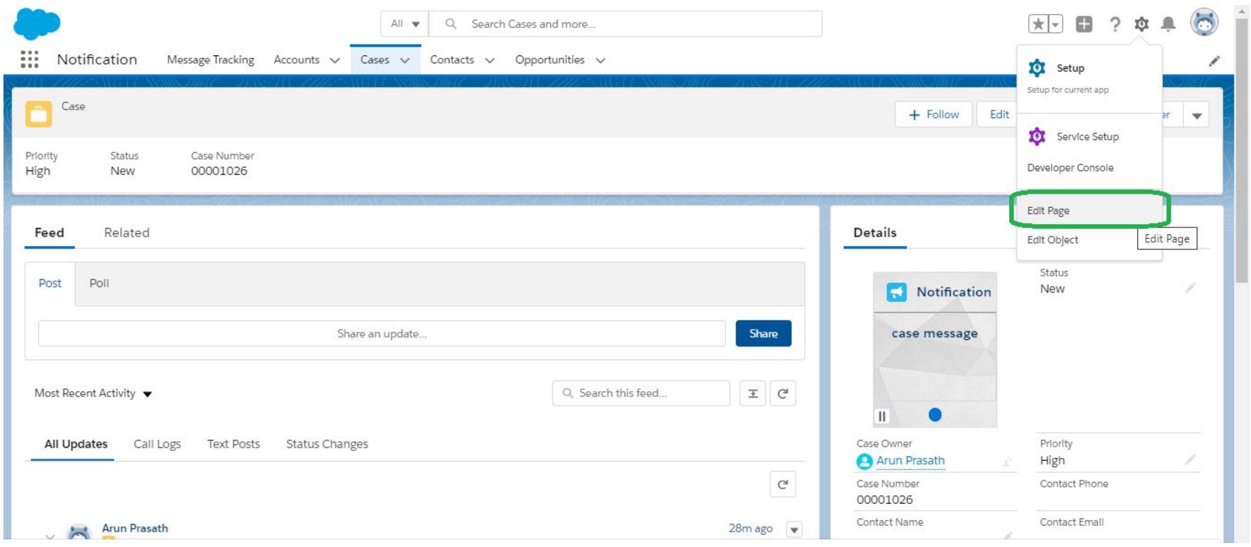
Notification app is compatible with Salesforce Classic as well.

One Time Configuration(Important)

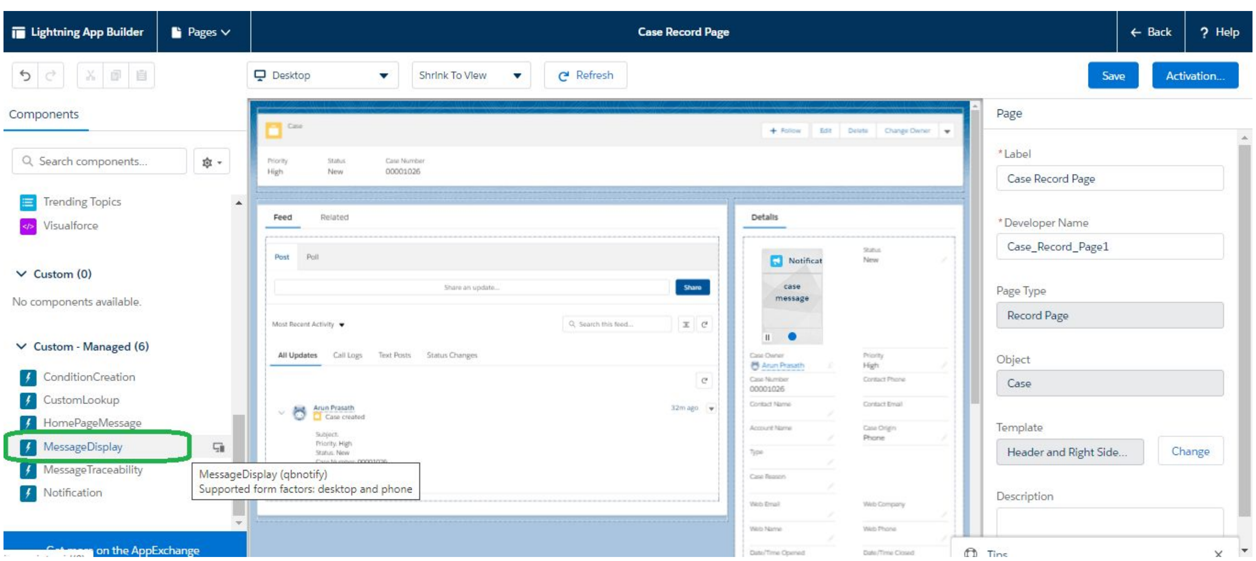
For Lightning:

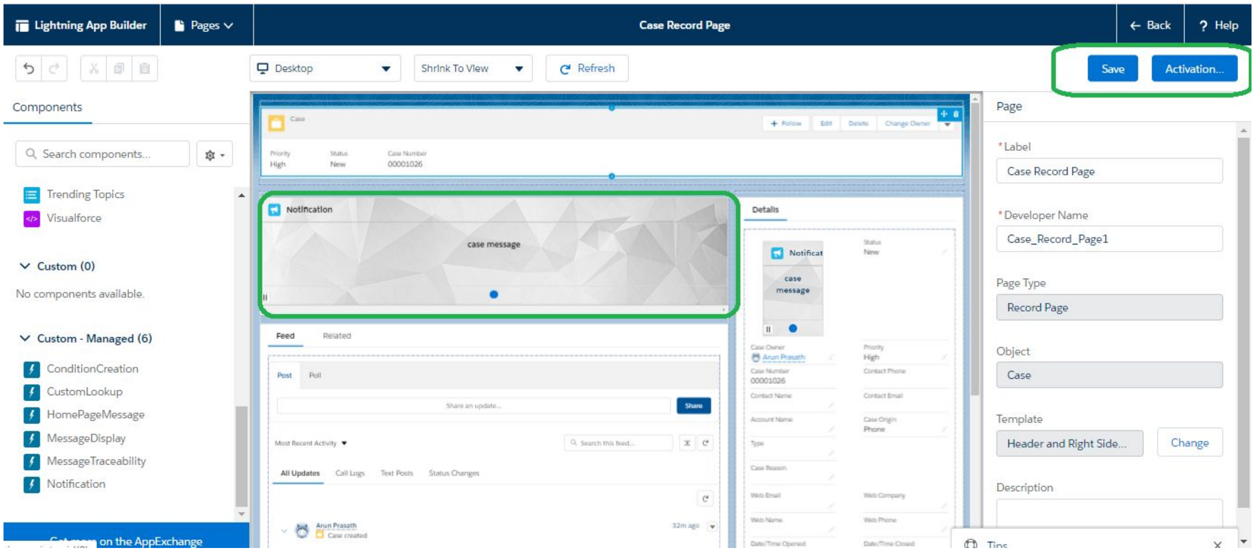
Prerequisite: Need System Admin Profile

Go to the Record Detail page of the respective object, Case object is shown in this example. Click Edit Record Page.



Select, drag and place the ‘MessageDisplay’ Custom Component in the area wherever you want.



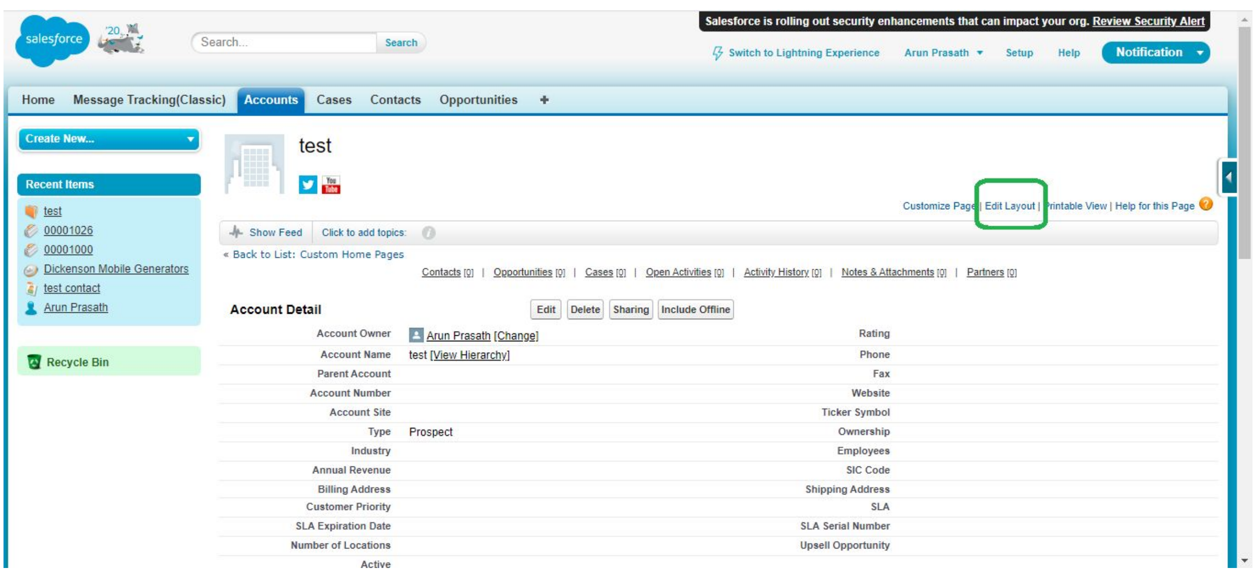


Click Save and Activate(Repeat the same steps for the other objects).
Go to the record detail page to view the notification.

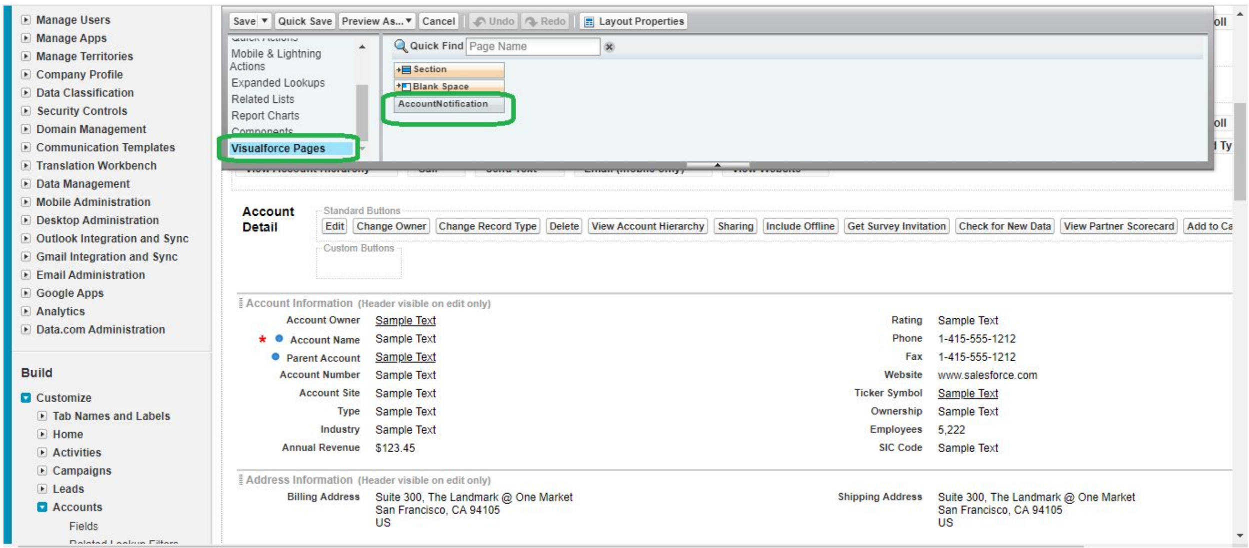
For Classic:

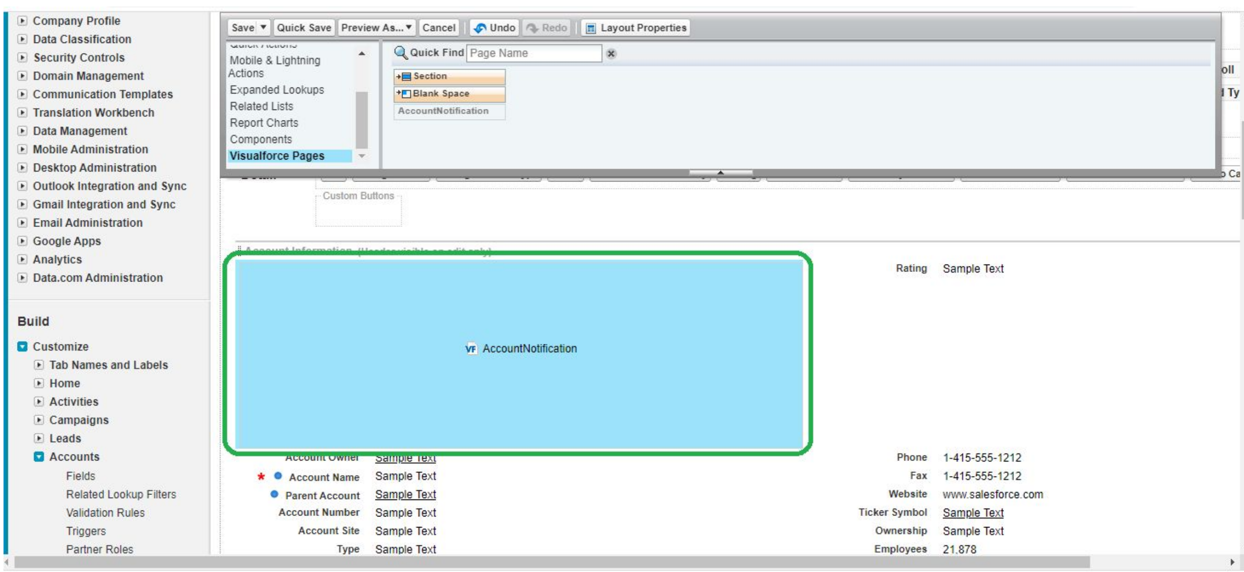
Prerequisite: Need System Admin Profile

Go to the Record detail page of the respective object, Account object is shown in this example. Click Edit Layout as shown below



Select ‘Visualforce Pages’ in the left pane, Select, drag and place the AccountNotification VF page wherever you want.





Click Save(Repeat the same steps for the other objects).
Go to the record detail page to view the notification.