

Notification App - Details

Highlights

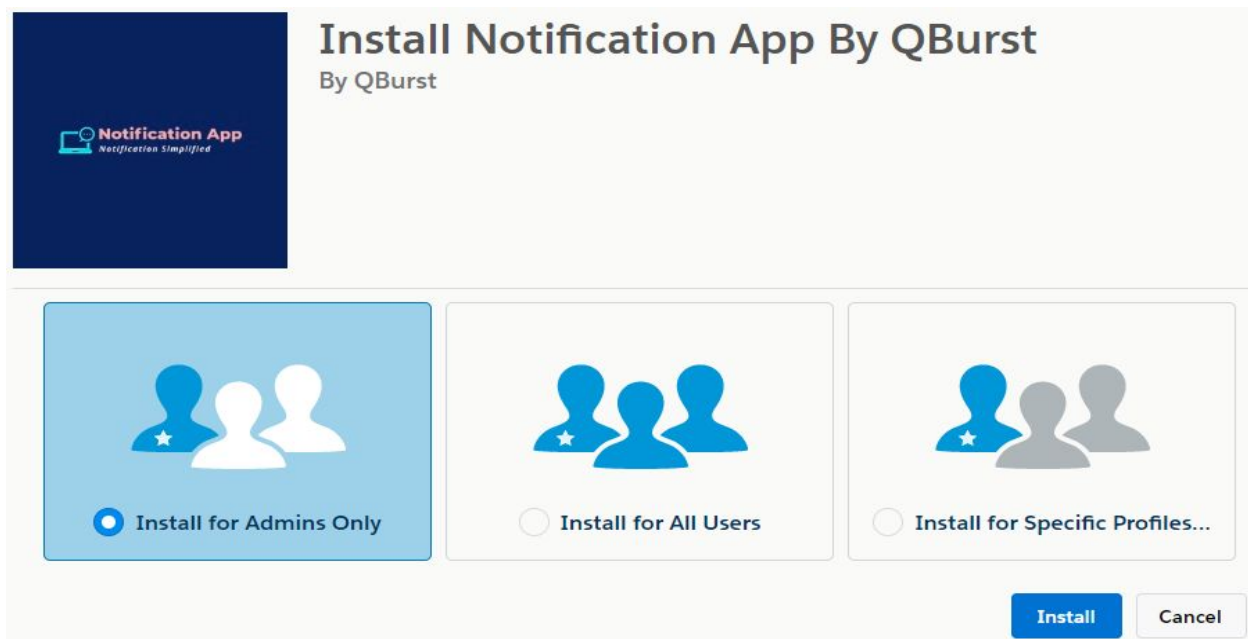
Notification App by QBurst provides a user-friendly Notification process. This enables the users to set up notifications with just a simple setup in UI with no technical dependency. It provides additional features over existing Salesforce notification system, like

- 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.

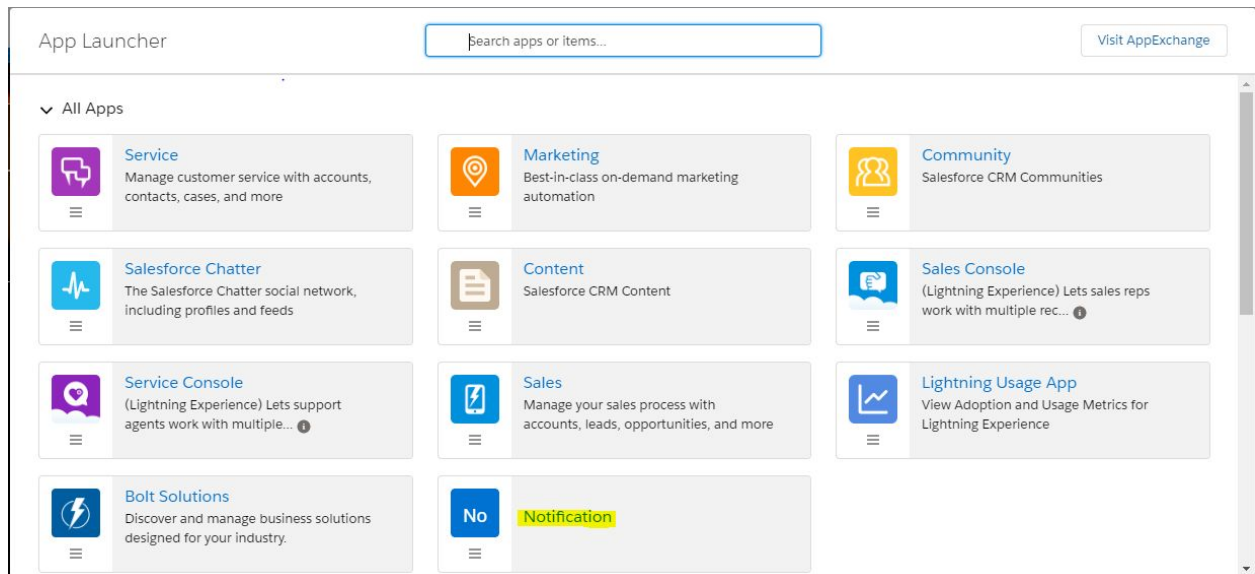
Please login into the salesforce, Once logged in will see below image



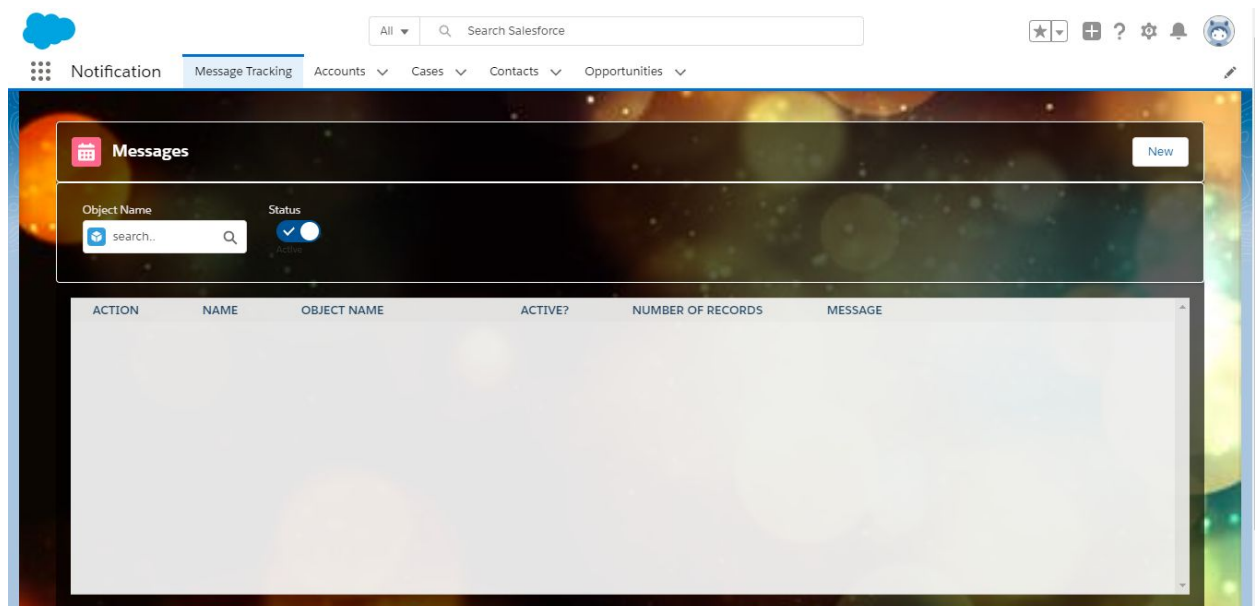
Select Install for All Users and Click Install. It will validate and install the app.
Click Done.

Switch to Lightning Experience.

Select the Notification app from the App Launcher, see below screenshot

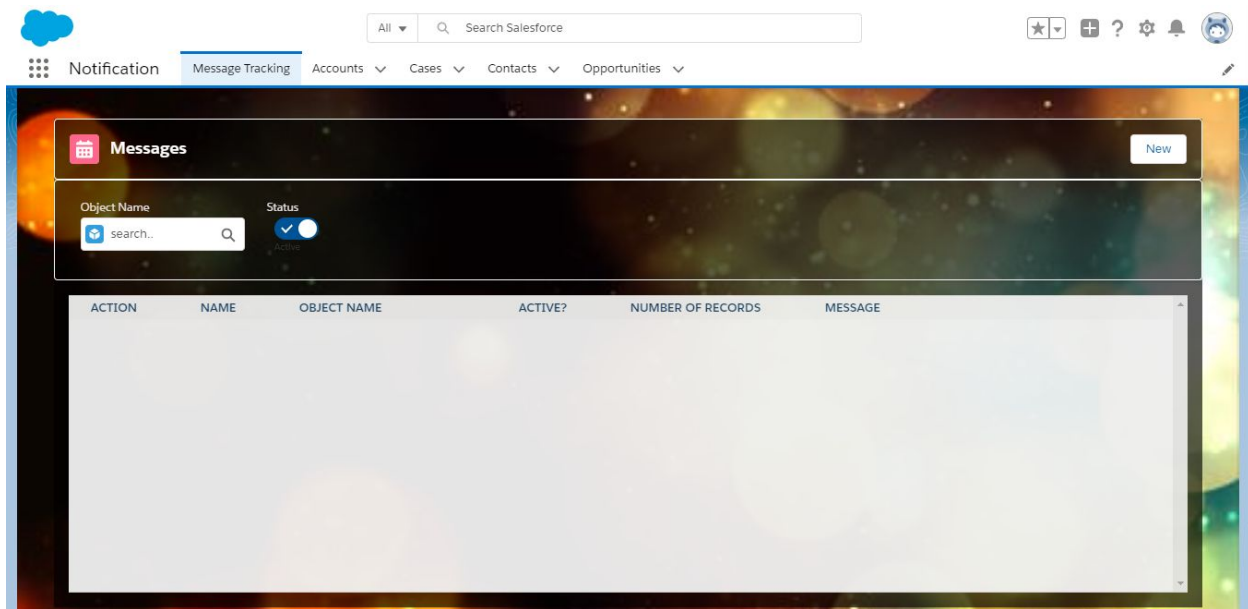


Once the Notification app is selected, you will see the below image as a dashboard.



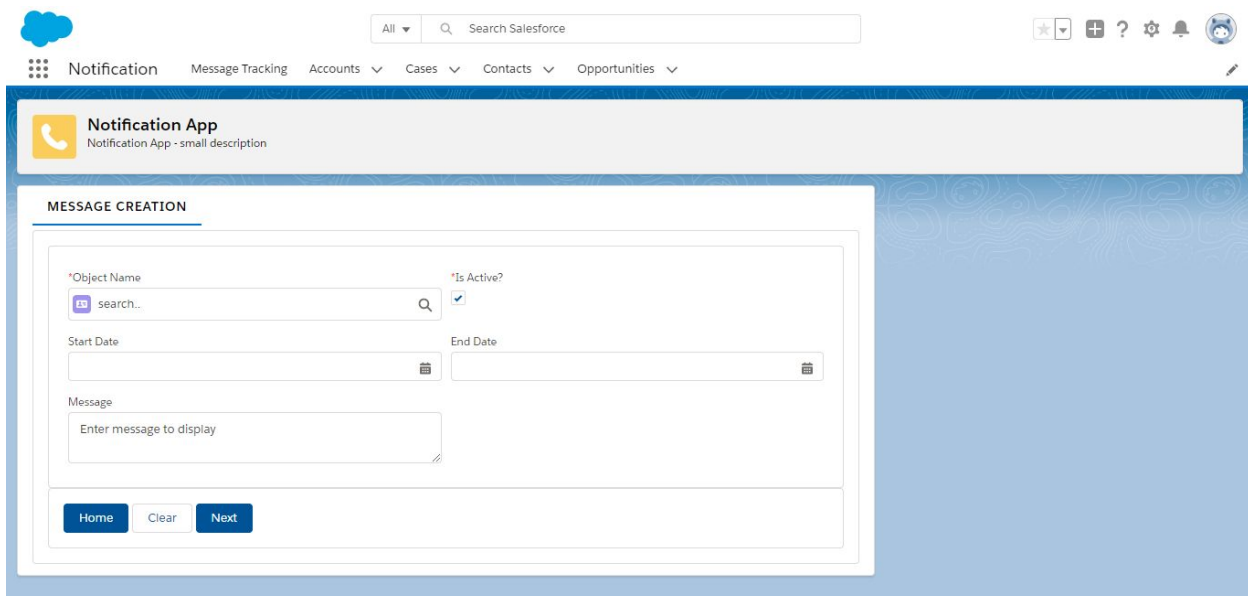
Using the Notification App

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

The screenshot shows the 'MESSAGE CREATION' interface within the Salesforce Notification App. The header includes the Salesforce logo, a search bar, and navigation tabs for Notification, Message Tracking, Accounts, Cases, Contacts, and Opportunities. The main content area is titled 'MESSAGE CREATION' and contains the following fields:

- *Object Name:** A dropdown menu with 'Account' selected.
- *Is Active?:** A checkbox that is checked.
- Start Date:** A date picker set to 'Sep 16, 2019'.
- End Date:** A date picker set to 'Sep 30, 2019'.
- Message:** A text area containing the text 'Provide 10% cashback on 199 recharge and above'.

At the bottom of the form, there are three buttons: 'Home', 'Clear', and 'Next'.

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)

This screenshot shows the same Salesforce Notification App interface, but with the 'CONDITION CREATION' section visible alongside the 'MESSAGE CREATION' section. The 'MESSAGE CREATION' section remains the same as in the previous image. The 'CONDITION CREATION' section, titled 'Rule Criteria', contains the following fields:

- *Field:** A dropdown menu with 'Select Field' selected.
- *Operator:** A dropdown menu with 'Select operator' selected.
- Value:** A text input field.

An 'Add Condition' button is located at the bottom right of the 'Rule Criteria' section.

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

The screenshot shows the 'Notification App' interface. The 'MESSAGE CREATION' panel on the left includes fields for 'Object Name' (Account), 'Is Active?' (checked), 'Start Date' (Sep 16, 2019), 'End Date' (Sep 30, 2019), and a 'Message' dropdown (Provide 10% cashback on 199). The 'CONDITION CREATION' panel on the right shows 'Rule Criteria' with 'Field' (Select Field), 'Operator' (Select operator), and 'Value' (empty). Below this is a table with one condition:

S.NO	FIELD	OPERATOR	VALUE	ACTION
1	type	=	Customer - Direct	Delete

Buttons for 'Add Condition', 'Add Filter Logic...', 'Cancel', and 'Save' are visible.

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.

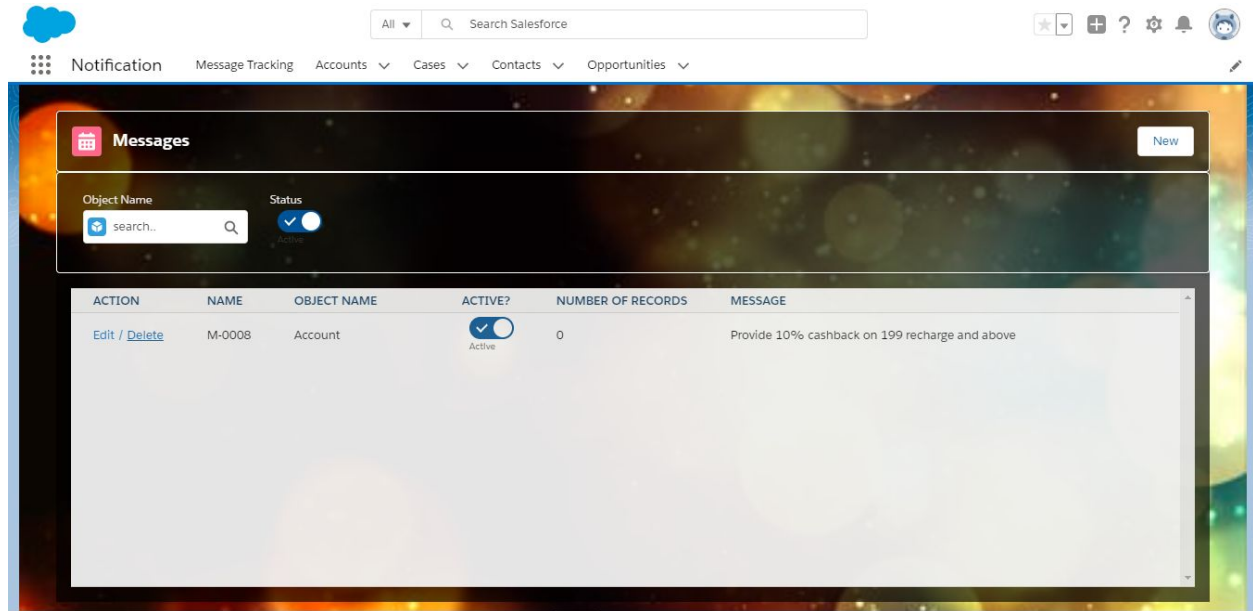
The screenshot shows the 'Notification App' interface with two conditions added. The 'MESSAGE CREATION' panel is identical to the previous one. The 'CONDITION CREATION' panel shows a table with two conditions:

S.NO	FIELD	OPERATOR	VALUE	ACTION
1	type	=	Customer - Direct	Delete
2	billingcity	=	Chennai	Delete

Below the table, the 'Filter Logic' section shows '1 AND 2' selected. Buttons for 'Add Condition', 'Clear Filter Logic', 'Cancel', and 'Save' are visible.

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

Billing Street

Shipping Address

Shipping Street

Billing City

Chennai

Billing
State/Province

Shipping City

Shipping
State/Province

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

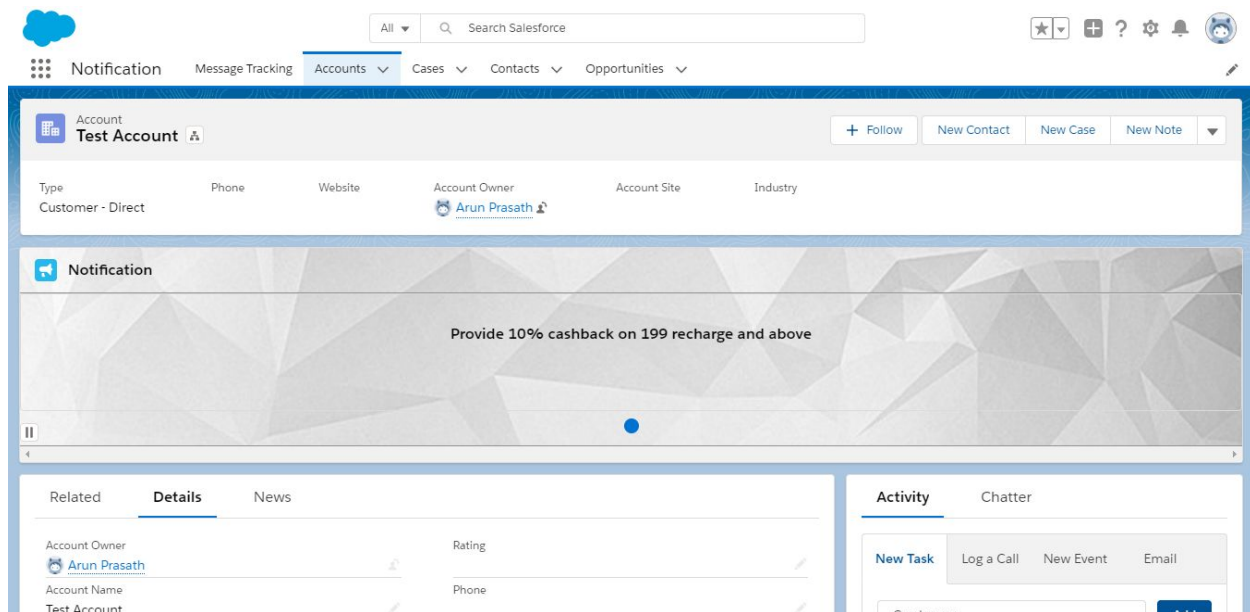
Cancel

Save & New

Save

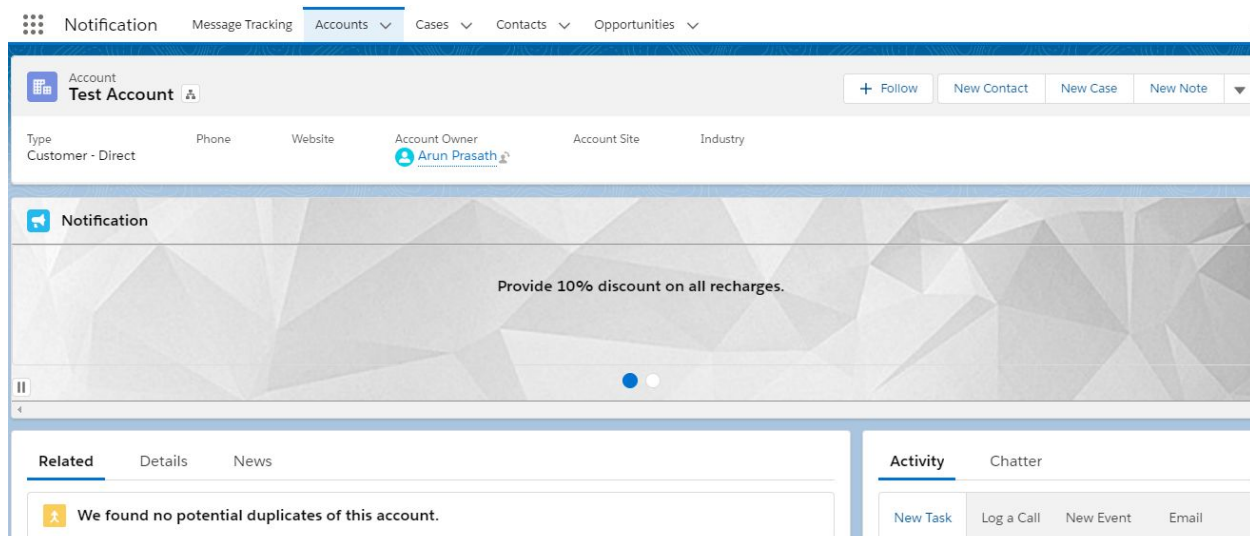
Notification Display(Please refer to the 'One Time Configuration' section below to get the notification displayed)

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.

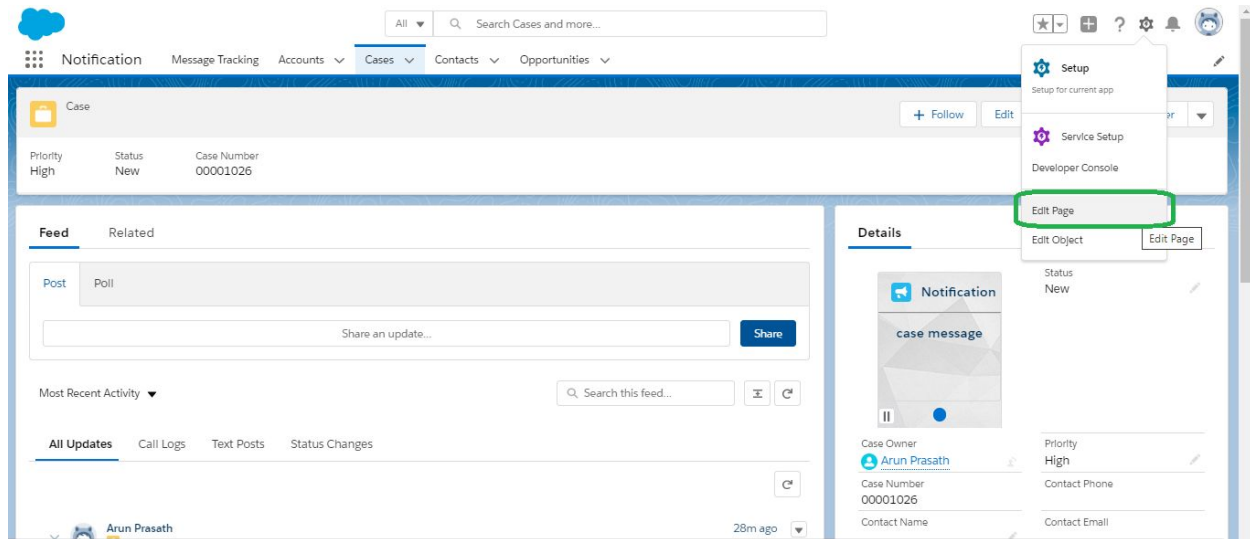
Notification app is compatible with Salesforce Classic as well.

One Time Configuration(Important)

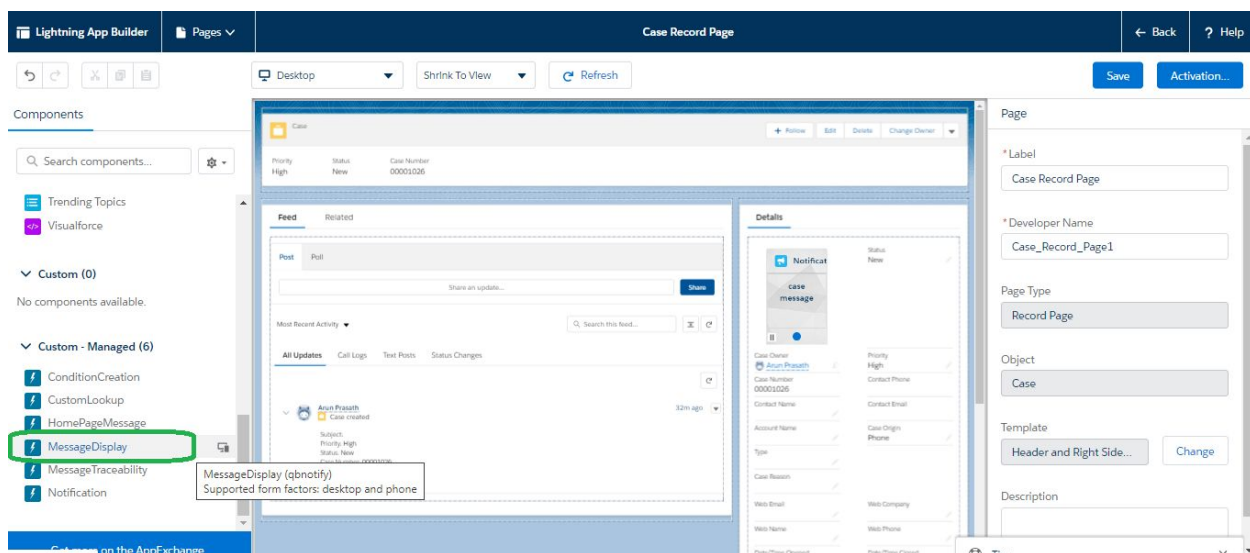
For Lightning:

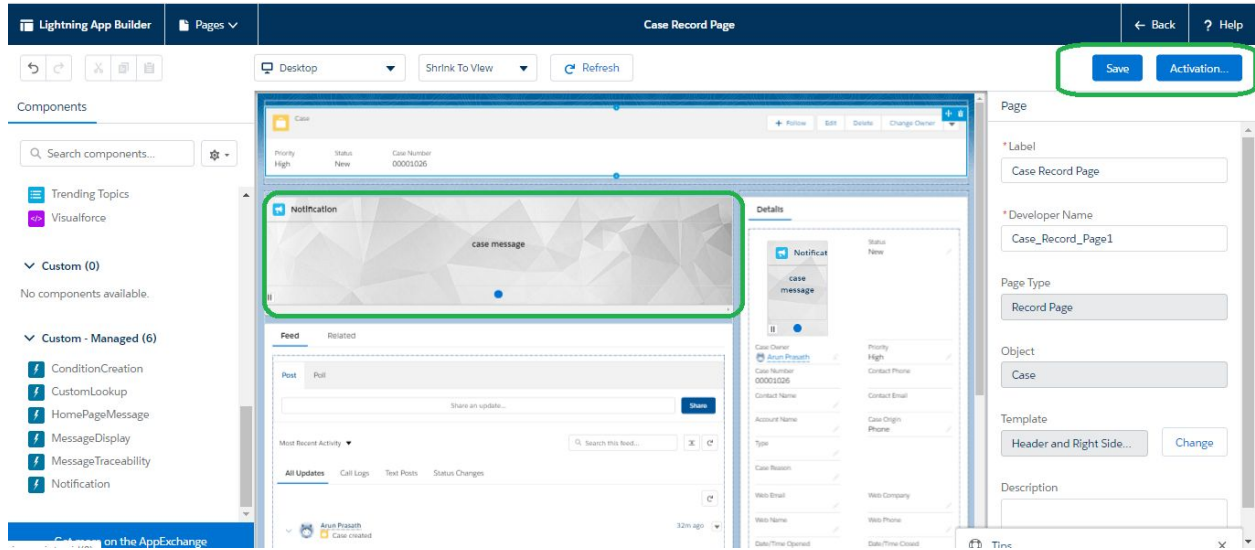
Prerequisite: Need System Admin Profile

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.



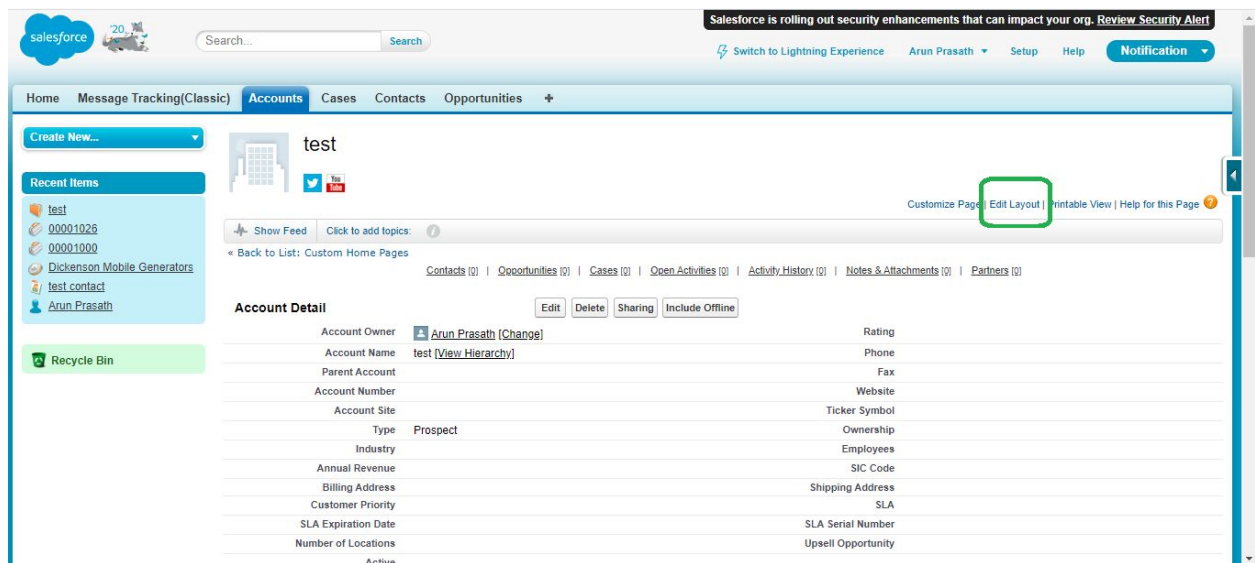


Click Save and Activate(Repeat the same steps for the other objects).
Go to the record detail page to view the notification.

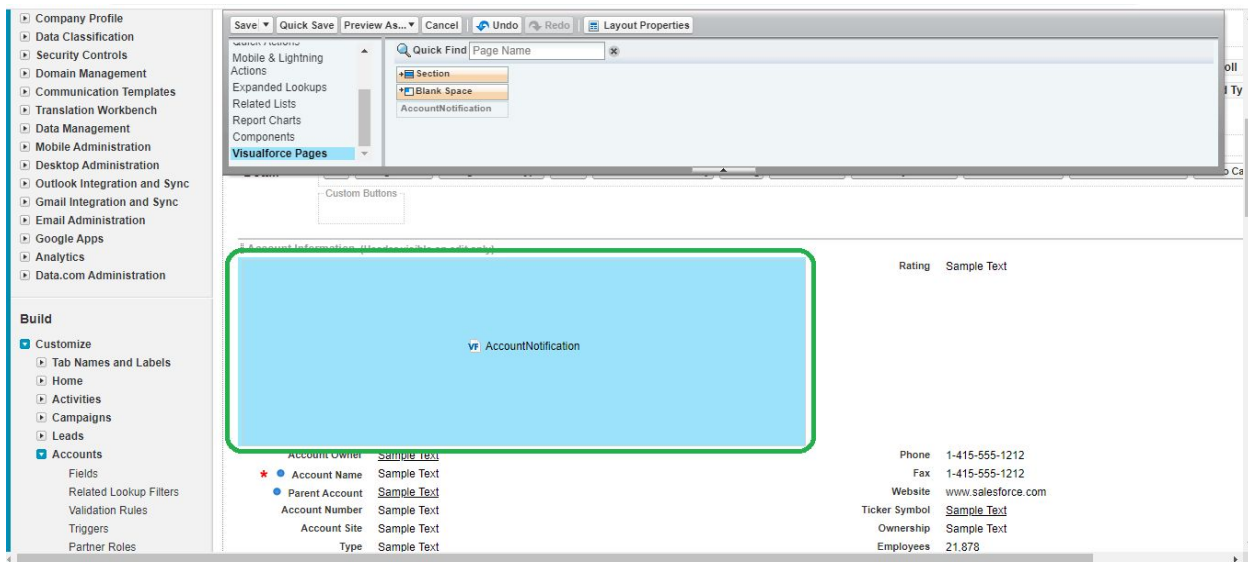
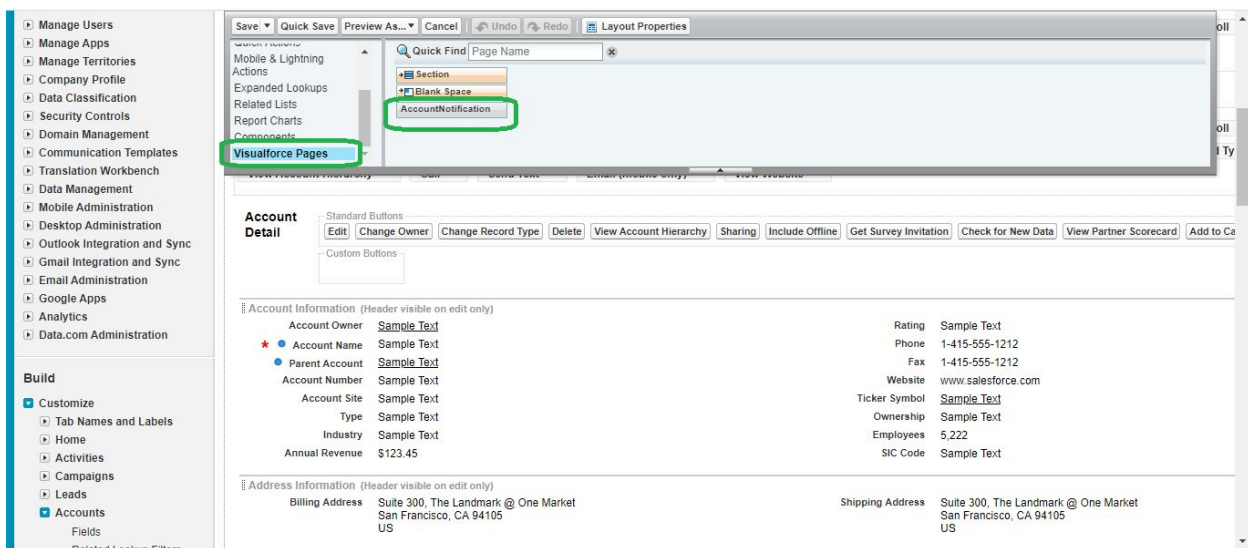
For Classic:

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.