

Setting Document for Status Card

About this component

- This component is not officially released by Salesforce and provides an image of function enhancements by Salesforce development.
In addition, since this component is not provided as a product, we cannot accept inquiries about sales force.
- The packages described in this document are not supported and consequently there is no warranty or update support for Salesforce.
- Please understand the above and utilize this component.

Characteristics of the Component

- Users can **immediately notice the information that they need to respond to.**
- You can set a range of values based on the number of records and **notice by the color change of the panel.**
- **Personalized record status management** by allowing individual user settings.

Differentiating point from Dashboards

- Reduced deployment space
- Be easy to notice

Package Information

Management Packages

<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3u00000001K1EAL>

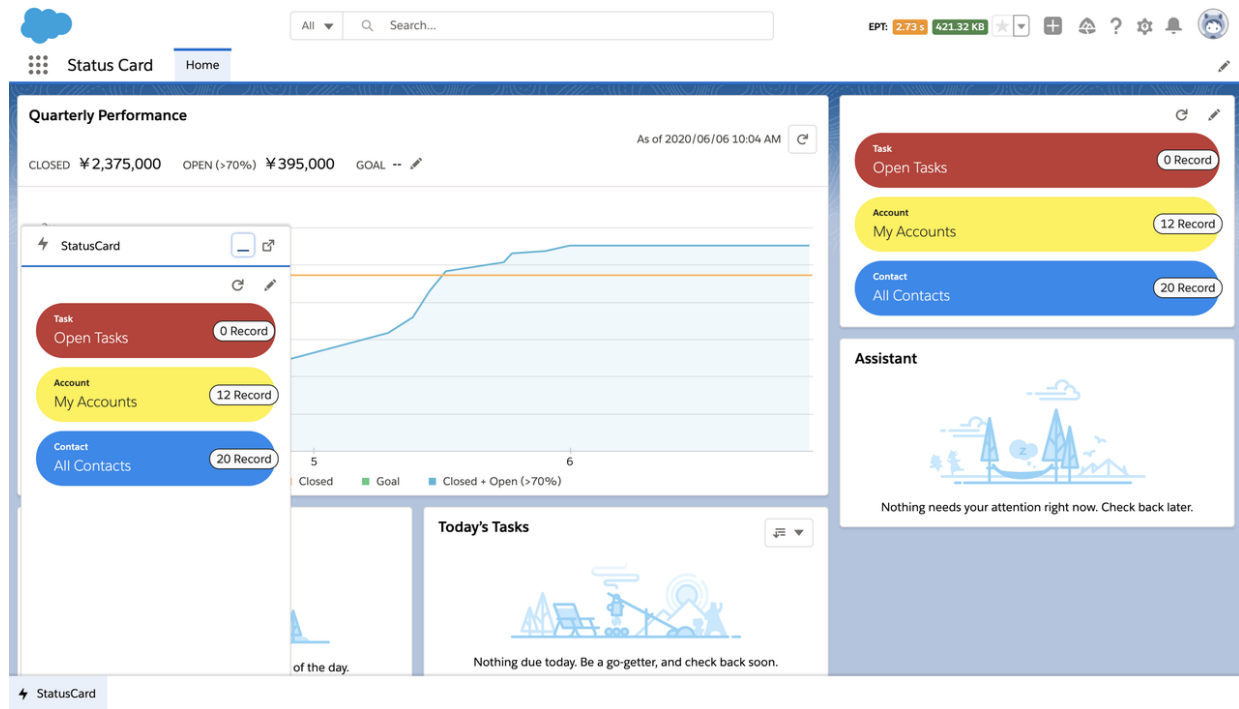
Unmanaged Package

Github in preparation

How to install components

This component can be setting on the Utility Bar and the Lightning page.

Component Placement Image in home screen (below sample is setting in the home page and on the utility bar.)



Setting in the Lightning page

The screenshot shows the Lightning page setup interface. On the left, the 'コンポーネント' (Components) sidebar lists various components. A red box highlights the 'StatusCard' component in the 'カスタム (8)' (Custom) section. A red arrow points from this box to the 'Drag & Drop' area in the center, which contains a calendar view. The right sidebar shows the 'アシスタント' (Assistant) section with a '今日のToDo' (Today's ToDo) list.

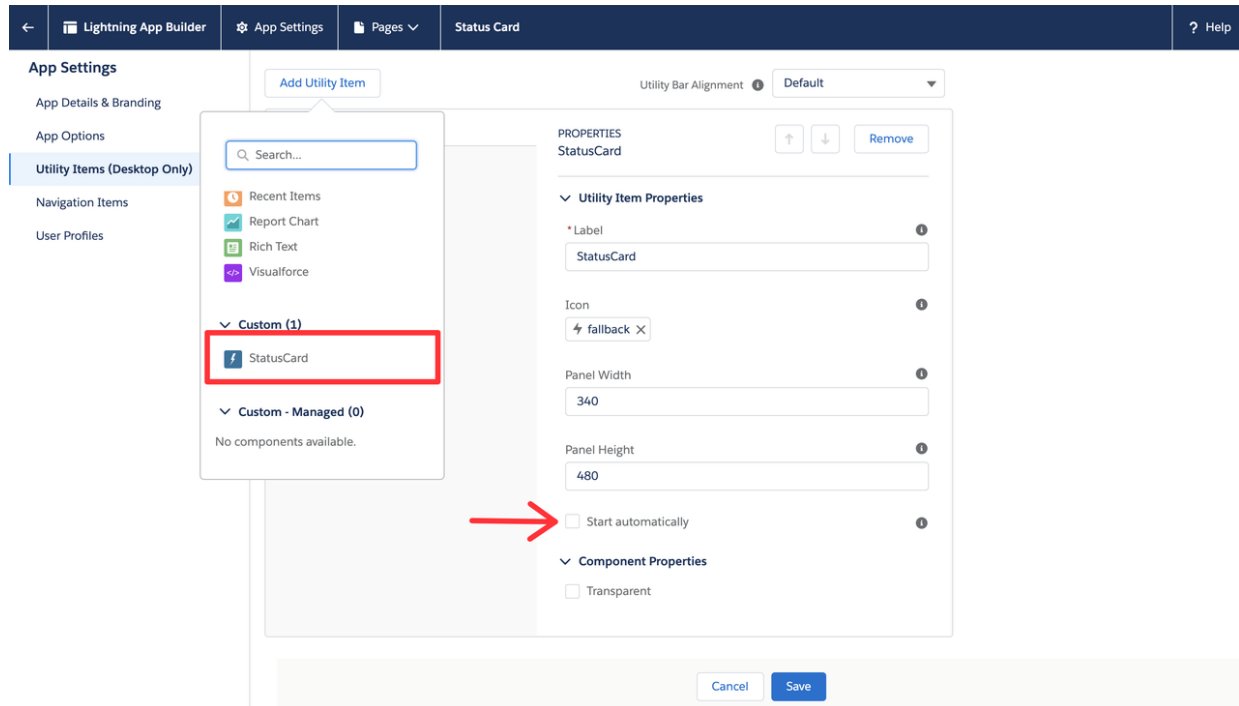
Setting on the Utility Bar

Go to Setup > Apps > App Manager.

Select the Lightning application you want to configuration, edit it (or new creation)

and go to the Lightning Application Builder.
Select the Utility items of Application Settings (Desktop only).
Press the Add Utility Item button and select the StatusCard.

***To avoid component errors, do not check "Start automatically".**



Component settings

Page > StatusCard

Transparent

Set the background of the component to transparent.

☐ Transparent

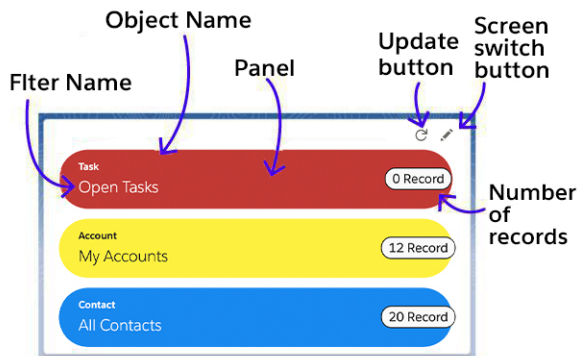
Set Component Visibility

Filters

+ Add Filter

Component screen settings

View Screen



Object Name

Displays the label of the object for the filter selected in the settings screen.

Filter Name

Displays the label of the filter selected in the settings screen.

Panel

It is shown in the configuration of the 1 object · 1 filter. The background color changes according to the conditions set in the Edit screen. The panel is a link. Clicking on the panel will take you to the List View of the Object you have set.

Number of records

Displays the number of records retrieved from the List View.

Since the load is asynchronous, "Loading ..." is displayed during the load, or "Access Error" if the user cannot access it.

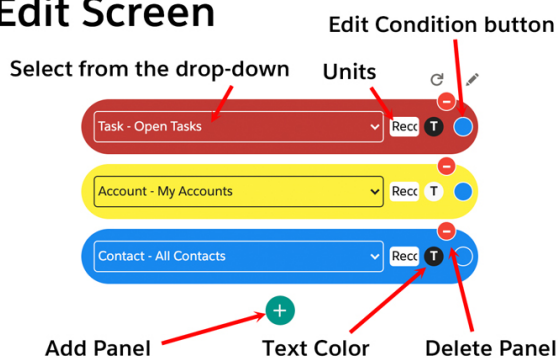
Update button

Refresh components to get the latest data.

Screen switch button

Toggles the View / Edit screen.

Edit Screen



Object + Filter Selection

Select from the drop-down

The display format is "Object Name - Filter Name".

Note that all lists in your organization are displayed, so you can specify objects that you do not have access to.

Units

Unit of record count.

Text Color

You can switch the text color of the Object name and Filter name to white or black. Settings are per-panel and are not affected by changes in conditions.

Edit Condition button

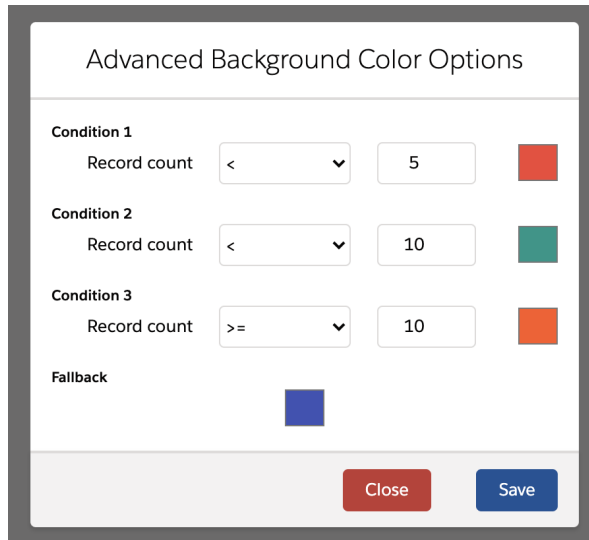
Opens the screen where you can set the background color change for the panel.

Delete Panel

Deletes a panel.

Add Panel

Adds a new panel.



The dialog box is titled "Advanced Background Color Options". It contains three conditions and a fallback section. Each condition has a label, a comparison operator dropdown, a threshold input field, and a color chip. Condition 1: Record count < 5 with a red chip. Condition 2: Record count < 10 with a green chip. Condition 3: Record count >= 10 with an orange chip. The Fallback section has a blue chip. At the bottom are "Close" and "Save" buttons.

Condition	Record count	Operator	Threshold	Color Chip
Condition 1	Record count	<	5	Red
Condition 2	Record count	<	10	Green
Condition 3	Record count	>=	10	Orange
Fallback				Blue

Condition Settings Panel

Condition 1 - 3

Sets the background color of the panel based on the number of records. (*)

The color setting buttons are browser-dependent and differ in Chrome/Safari.

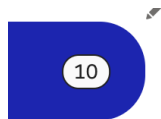
***Click each Condition Color Chip to open the color setting box.**

Fallback

The default color is displayed if the condition does not meet conditions 1-3.

Condition setting specification

Multiple thresholds can be set based on default color settings and criteria, and the evaluation of thresholds is determined by the number of records.



For example, if there are two sets of threshold settings:

Default: background color [# 000000], text color [# ffffff]

Condition 1: Threshold [3 or Less] for background color [# ff0000], text color [# ffffff]

Condition 2: Threshold [7 or more] for background color [# 00ff00], text color [# ffffff]

If the number of records is 1, Condition 1 is applied and the background color [# ff0000] and text color [# ffffff] are selected.

If the number of records is 5, "Default" is applied and the background color [# 000000] and text color [# ffffff] are used.

If the number of records is 8, Condition 2 is applied and the background color [# 00ff00] and text color [# ffffff] are selected.

For example, if there are three sets of threshold settings:

Default: background color [# 000000], text color [# ffffff]

Condition 1: Threshold [3 or Less] for background color [# ff0000], text color [# ffffff]

Condition 2: Threshold [5 or Less] for background color [# 00ff00], text color [# ffffff]

Condition 3: Threshold [8 or Less]; Background Color [# 0000ff]; Text color [# ffffff]

If the number of records is 1, Condition 1 is applied and the background color [# ff0000] and text color [# ffffff] are selected.

"Condition 2" is applied when the number of records is four.

If the number of records is 7, Condition 3 is applied and the background color [# 0000ff] and text color [# ffffff] are selected.

If the number of records is 10, the default is applied and the background color [# 000000] and the text color [# ffffff].

Component Language Settings (multilingual support)

The text displayed in the component can be set from a custom display label.

The category is set in "**StatusCard**", and changes in the master label will also be handled.

**You cannot change the text entered in the component settings configured on the Lightning Application page.*

**Some system text, such as system errors, cannot be changed.*

The following sections introduce multilingual support using the Translation Workbench.

[Reference]

HELP: <https://help.salesforce.com/articleView?id=sf.workbench.htm&type=5>

Activating the Translation Workbench

- Go to [Setup > User Interface > Translation Workbench > Translation Language Settings] and enable it if it is not already enabled.
- After enabling, press the "Add" button in Supported Languages to add a language.
- Set up and save translators.

Set up a translation

- Go to [Setup > User Interface > Custom Labels].
- Press the name of the label you want to translate and go to the details page.
- Press "New" of the Translations item to create a new one or open the language you want to edit.
- Select a language and enter and save the text you want to appear in the translation language.

Other

About Component Update Timings

This component is initialized at a time other than when the update button is pressed.

- When the component was imported for the first time. (*)
- When editing in the component editing screen and switching to the view screen.

** This includes when an item in the utility bar is displayed in a different window and minimized to put back to the utility bar.*

When a component update occurs outside of the refresh button, **all Status Card components in the updated page are synchronized and updated.**

About Editing Panels

If you have never added a panel, it appears on the edit screen the first time you display it.
After you add and save panels, **you cannot delete the first panel of a component.**

Setting information for each user

One record per user is stored in the StatusCard__c custom object included in the PKG.

Component use conditions

- Organization Edition must be EE or higher
- Access right for List/Object is required
- This Component need a user system privileges "Enable API" In a Profiles (or Permission Sets)

Notes

- Up to 2000 cases can be counted (acquisition) on the component.