

Upcoming Birthdays

Keep track of all upcoming birthdays of followed contacts in your Salesforce sidebar.

Installation Guide

1. Install the package: Upcoming Birthdays

2. Grant access to all users during Upcoming Birthday package install **OR** grant visualforce page security access on Upcoming Birthdays under: *Setup* → *App Setup* → *Develop* → *Pages* → *Upcoming Birthdays*. Select the „security“ link and add profiles as needed.

Search All Setup... ? Q

Expand All | Collapse All

Salesforce1 Setup **New!**

Force.com Home

Administer

- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Email Administration
- Google Apps
- Data.com Administration

Build

- Customize
- Create
- Develop**

- Schema Builder
- Canvas App Previewer
- Installed Packages
- AppExchange Marketplace
- Critical Updates



Build

- Customize
- Create
- Develop**

- Apex Classes
- Apex Triggers
- Apex Test Execution
- API
- Components
- Custom Permissions **New!**
- Custom Settings
- Email Services
- Lightning Components **BETA**
- Pages**
- Sites
- Static Resources
- Tools
- Remote Access
- External Data Sources
- External Objects
- Secure Agents



Enable Profile Access for Visualforce Page

BirthdateOverview

Save Cancel

| Available Profiles | Enabled Profiles |
|---|--|
| <ul style="list-style-type: none"> Authenticated Website Contract Manager Cross Org Data Proxy User Custom: Marketing Profile Custom: Sales Profile Custom: Support Profile Customer Community Login User Customer Community User Customer Portal Manager Custom Customer Portal Manager Standard Force.com - App Subscription User Force.com - Free User Gold Partner User High Volume Customer Portal | <ul style="list-style-type: none"> System Administrator |

Add Remove



Visualforce Pages

Visualforce Pages provide a robust and easy to use mechanism to create new and exciting

View: All Create New View

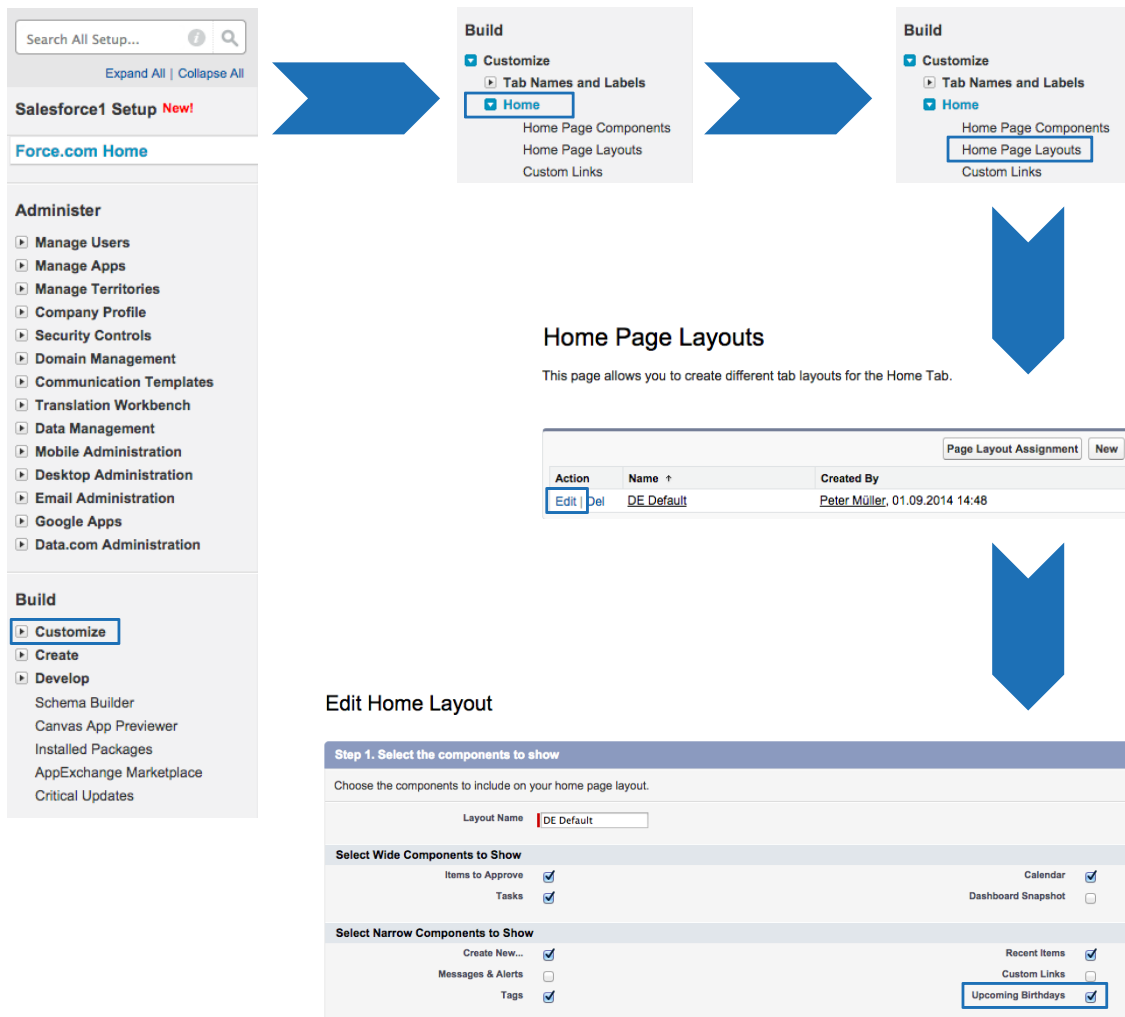
| Action | Label | Name | Namespace Prefix |
|----------|-------------------|-------------------|------------------|
| Security | BirthdateOverview | BirthdateOverview | aqu_bd |

3. Add the Upcoming Birthdays home page component to the desired home page layouts.

Navigate to *Setup* → *App Setup* → *Customize* → *Home* → *Home Page Layouts*.

Select „Edit“ for the desired layout

Under the „Select Narrow Components to Show“ select „Upcoming Birthdays“



Home Page Layouts

This page allows you to create different tab layouts for the Home Tab.

| Action | Name ↑ | Created By |
|--|------------|--------------------------------|
| Edit Del | DE Default | Peter Müller, 01.09.2014 14:48 |

Edit Home Layout

Step 1. Select the components to show

Choose the components to include on your home page layout.

Layout Name:

Select Wide Components to Show

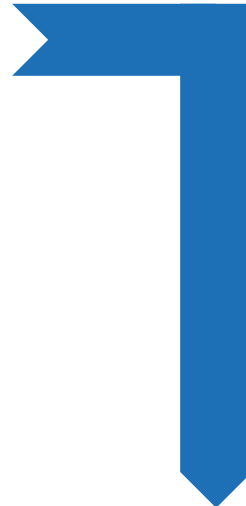
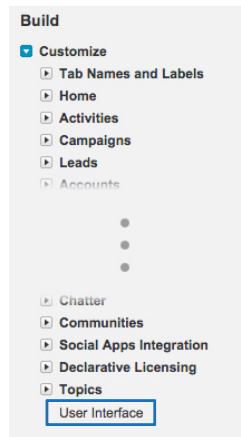
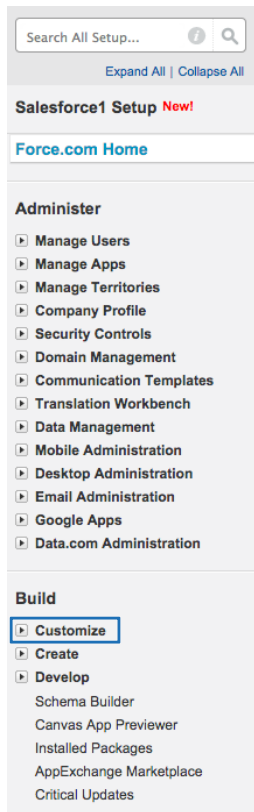
| | |
|--|--|
| Items to Approve <input checked="" type="checkbox"/> | Calendar <input checked="" type="checkbox"/> |
| Tasks <input checked="" type="checkbox"/> | Dashboard Snapshot <input type="checkbox"/> |

Select Narrow Components to Show

| | |
|---|---|
| Create New... <input checked="" type="checkbox"/> | Recent Items <input checked="" type="checkbox"/> |
| Messages & Alerts <input type="checkbox"/> | Custom Links <input type="checkbox"/> |
| Tags <input checked="" type="checkbox"/> | Upcoming Birthdays <input checked="" type="checkbox"/> |

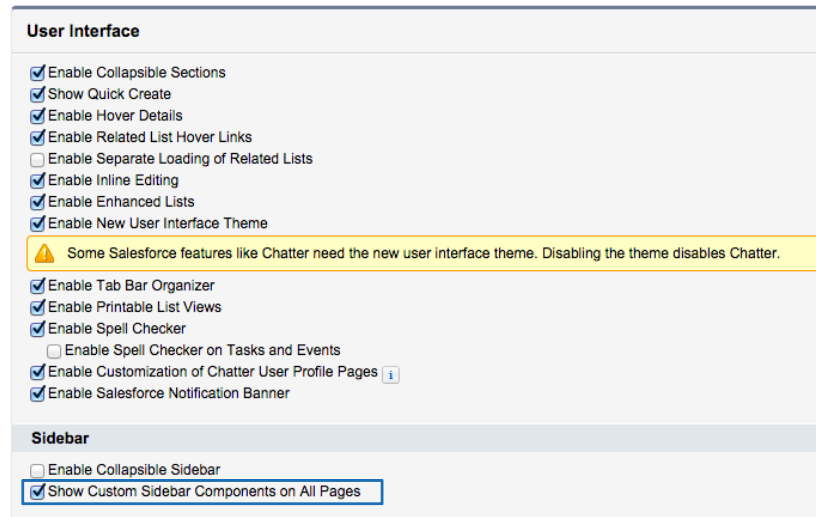
4. Optionally enable sidebar components on all pages.

Setup → Customize → User Interface → Show Custom Sidebar Components on All Pages



User Interface

Modify your organization's user interface with the following settings:



5. How to see the age of your followed Contacts.

Setup → Develop → Custom Settings → manage „BirthdateOverviewSettings“ → Edit → Select „Show Age“

Search All Setup...
Expand All | Collapse All
Salesforce1 Setup **New!**
Force.com Home
Administer
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Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Email Administration
Google Apps
Data.com Administration
Build
Customize
Create
Develop
Schema Builder



Build
Customize
Create
Develop
Apex Classes
Apex Triggers
Apex Test Execution
API
Components
Custom Permissions **New!**
Custom Settings
Email Services
Lightning Components **BETA**
Pages
Sites
Static Resources
Tools
Remote Access
External Data Sources
External Objects
Secure Agents



Custom Settings

Use custom settings to create and manage custom data at the o repeated queries. Custom settings data can be used by formula

Percentage of custom settings data used: 0,01%
You are currently using 0 MB of custom settings data in yo

View: All Create New View

| Action | Label ↑ | Visibility |
|--------|---------------------------|------------|
| Manage | BirthdateOverviewSettings | Public |



BirthdateOverviewSettings Edit

Provide values for the fields you created. This data is cached with the appli

Edit BirthdateOverviewSettings Save
BirthdateOverviewSettings Information
Name BirthdateOverviewSett
NumberOfBirthDates 5
ShowAge



Custom Setting
BirthdateOverviewSettings

If the custom setting is a list, click **New** to add a new :

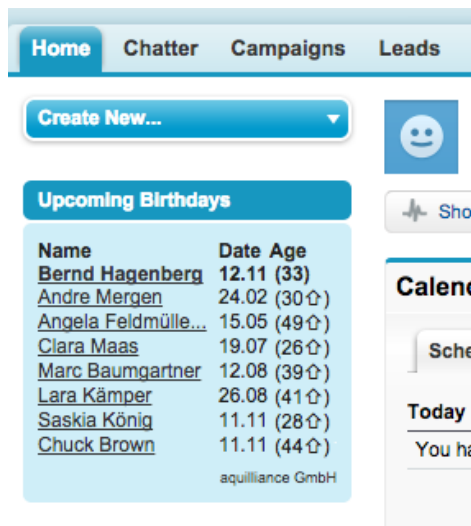
If the custom setting is a hierarchy, you can add data profile, or just a general user.

View: All Create New View

| Action | Name ↑ |
|----------|--------------------------|
| Edit Del | BirthdateOverviewSetting |

6. How to use:

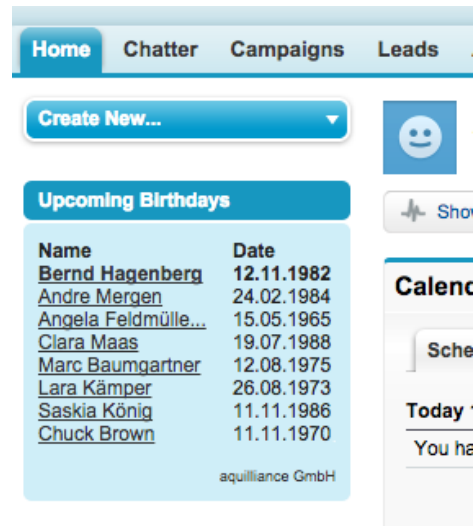
Once the Upcoming Birthdays homepage component is added to the layout you will see it on the left side bar. You can click on the name of the person to view the detail page and perform additional actions such as sending an email. The arrow beside the age shows you that the Contact is going to be older.



| Name | Date | Age |
|-------------------------------------|-------|--------|
| Bernd Hagenberg | 12.11 | (33) ↗ |
| Andre Mergen | 24.02 | (30) ↗ |
| Angela Feldmülle... | 15.05 | (49) ↗ |
| Clara Maas | 19.07 | (26) ↗ |
| Marc Baumgartner | 12.08 | (39) ↗ |
| Lara Kämper | 26.08 | (41) ↗ |
| Saskia König | 11.11 | (28) ↗ |
| Chuck Brown | 11.11 | (44) ↗ |

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Version 1 (Age)



| Name | Date |
|-------------------------------------|------------|
| Bernd Hagenberg | 12.11.1982 |
| Andre Mergen | 24.02.1984 |
| Angela Feldmülle... | 15.05.1965 |
| Clara Maas | 19.07.1988 |
| Marc Baumgartner | 12.08.1975 |
| Lara Kämper | 26.08.1973 |
| Saskia König | 11.11.1986 |
| Chuck Brown | 11.11.1970 |

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Version 2 (Birthdate)

7. Frequently Asked Questions

Can I make special settings?

» You can adjust only the Number of birthdates and you can decide if you want to show the age.

Can I adjust the height of the app in the sidebar?

» Yes you can, but you must create an new Custom Component and there you can choose the Upcoming Birthdays app as a Visualforce Area and in this mask you can adjust the height.

Where I can adjust the quantity of the shown birthdays?

» Yes you can adjust the quantity in the Custom Settings of Upcoming Birthdays.

Can I see another date formats?

» Yes you can adjust the date format depending on the language.

I can't see my own Conatcs, why?

» You can see all birthdays of contacts you follow.

What if I have more questions?

» Connect with us anytime.
Web: www.aquilliance.de