

Riptide Popup Alerts

Product Configuration Instructions

Riptide Popup Alerts is a great app that notifies you of important customer account information. It is a powerful app that uses all the same great things about it as the other apps. The great thing about it is it uses all the same great things about it as the other apps. The great thing about it is it uses all the same great things about it as the other apps.



Thank you for downloading Riptide Popup Alerts. These instructions will help get you up and running as quickly as possible, but if you need any assistance, give us a call at 800-747-8433, or send us an email at info@RiptideCloud.com.

Overview

In order for Riptide Popup Alerts to work properly, you will need to modify the page layouts of the objects on which you would like alerts to appear. You will need to add both the alert control and the custom field called Alert Message to each page layout on which you would like to display alerts. Riptide Popup Alerts can display an alert on Leads, Accounts, Contacts, Opportunities, and Cases.

The Popup will only display when the Alert Message custom field on the record you are viewing has text entered into it or the Alert Message field on a related record has text in it.

Modifying Page Layouts

The steps for modifying a page layout are essentially the same for Account, Contact, Lead, Opportunity and Case. This section will take you through modifying the page layout of the Account object and you can follow the same steps for all the other objects.

- 1 Login to Salesforce.com as a System Administrator.
- 2 Click on the Setup link at the top of the page.
- 3 On the menu on the left under the App Setup section, click on Customize > Accounts > Page Layouts.
- 4 Click the Edit link next to the Page Layout you wish to modify.
- 5 Decide whether you are going to use a Visualforce page or an S-Control.
- 6 Select the appropriate Visualforce page or S-Control from the list and drag it to an out-of-the-way place on the page layout.
- 7 Resize the control so that it is zero pixels high.
- 8 Drag the Alert Message custom field to an appropriate spot on the page layout.
- 9 Repeat this process for all Account page layouts and all page layouts for Contacts, Leads, Opportunities, and Cases as appropriate.

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