

ListBrowse

IMPLEMENTATION GUIDE FOR CLASSIC

ToAFinish!

LIST BROWSE FOR SALESFORCE

Implementation Guide

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Chapter 1

List Browse Introduction and Philosophy

This chapter introduces the user to Salesforce.com, the To A Finish organization and the List Browse app

This brief manual is an introduction to List Browse and the philosophy behind this popular app. For those eager to get going, the first chapter can be skipped in favor of a quick implementation of the List Browse App.

ICON KEY
Details You Can Skip
Don't Miss This!
Sample Code
Danger!

To succeed in configuring and installing List Browse you will need to pay close attention to all of the information contained in this manual, especially Chapter 2.

The Icon Key to the left shows the icons you will be seeing as you go through this manual. The more advanced readers can skip some of the details as indicated by the appropriate icon.

This manual is a work in progress, so please do take notes and let us know if you run into any issues with the text or if you believe there is a better way to accomplish the tasks we describe.

Introducing Salesforce.com

Salesforce.com's CRM solution is broken down into several broad categories: Sales Cloud, Service Cloud, Data Cloud (including Jigsaw), Collaboration Cloud (including Chatter) and Custom Cloud (including Force.com). Below, we'll highlight a few of them.

The Sales Cloud



The Sales Cloud includes a real-time sales collaborative tool called Chatter, provides sales representatives with a customer profile and account history, allows the user to manage marketing campaign spending and performance across a variety of channels from a single application, tracks opportunity-related data including milestones, decision makers, customer communications, and other information unique to the company's sales process. Automatic email reminders can be scheduled to keep teams up to date.

Other activities on the Salesforce cloud include using the Jigsaw business data to access business contacts, and designing and automating processes in Salesforce CRM.

The Service Cloud

The Service Cloud provides companies with a call center-like view that enables them to create and track cases coming in, and automatically route and escalate what's important. The Salesforce CRM-powered customer portal provides customers the ability to track their own cases, includes a social networking plug-in that enables the user to join the conversation about their company on social networking websites, provides analytical tools and other services including email, chat, Google search, and access to customers' entitlement and contracts.

The Force.com Platform

Salesforce.com's platform as a service (PaaS) product is known as Force.com. The Force.com platform allows external developers to create add-on applications that integrate into the main salesforce.com application and are hosted on Salesforce.com's infrastructure.

These applications are built using Apex (a proprietary Java-like programming language for Force.com) and Visualforce (an XML-like syntax for building user interfaces in HTML or Flex).

You can continue reading more on Salesforce.com at WikiPedia.com.

Introducing To A Finish

To A Finish™ is a concept company that has grown out of a desire to improve the Salesforce CRM consulting industry. Too often we have found the priorities of consulting companies skewed towards speed and profitability, rather than excellence and long-term success. This is not a blanket statement about all consulting companies, rather a general statement of the industry at large.

We believe there is a different way of consulting that will bring ultimate success to any CRM venture. The biggest difference is time. We give special attention to steps that are often rushed or even overlooked entirely in a typical project. Things like in-depth analysis, getting to really know a business, documentation and end-user involvement in the process help us set up a project for success. Ultimately, we must spend the time to do the work until it is absolutely complete; To A Finish™.

We are not guaranteeing our clients will never see a bug or have to rethink initial strategies. Reworking is actually part of the process of achieving success. What we are saying is that our strategies and focus will minimize unforeseen problems and achieve for us an ultimately successful project completion. We put our name on our work and stake our reputation on quality service.

Test us. Allow us to show you the difference of doing work To A Finish™.

You can find more about To A Finish at www.toafinish.com



When you finish a thing you ought to be able to say to yourself: "There, I am willing to stand for that piece of work. It is not pretty well done; it is done as well as I can do it; done to a complete finish. I will stand for that. I am willing to be judged by it."
- O.S. Marden

Introducing List Browse

The philosophy behind the List Browse app is the ability to quickly browse data without requiring multiple screen changes.

With standard Salesforce.com configuration, in order to view two records on a list view, you must first click one record, and when finished go back in your browser and then click the other record. This is fine for two or three records, but when reviewing multiple records, it can get confusing and time consuming.

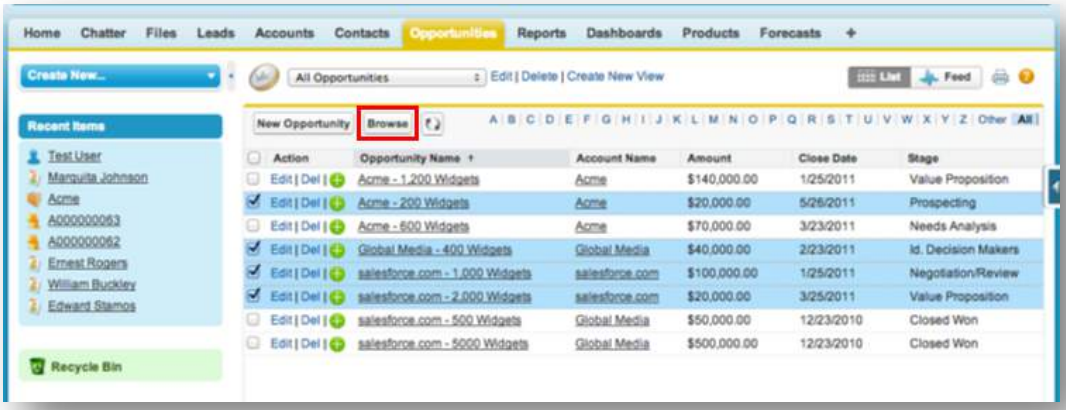
We have two different browse experiences for Classic, and only one in Lightning, which is covered in the main Implementation Guide:

	Paid Objects	**Free Objects**
Lightning	*All Objects **	*Contact, Account*
Classic	All Objects *	Contact, Account
Legacy Classic	All Objects **	Five Standard Objects **

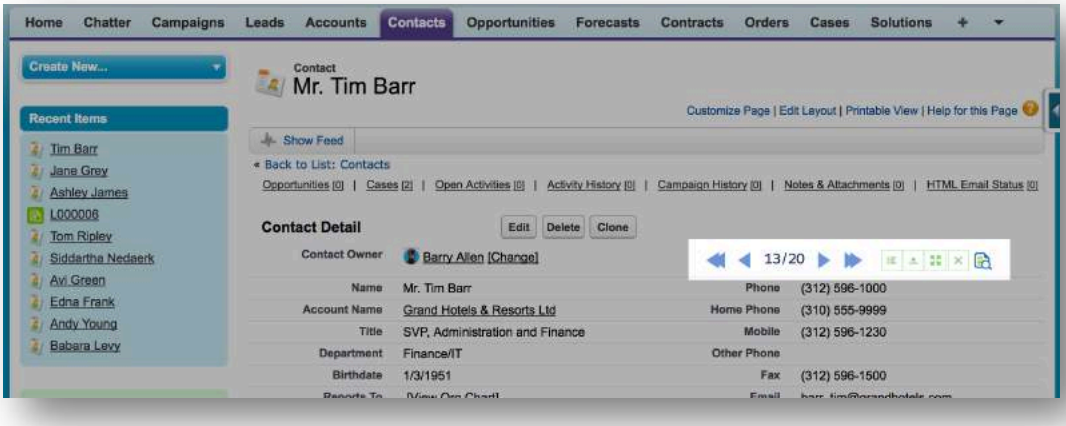
** Does not include some non-standard objects like Notes and Events.*

*** In Legacy Classic mode, most objects are available, but due to clickjacking protection, legacy mode is often unavailable, and if available, often read only, depending on settings.*

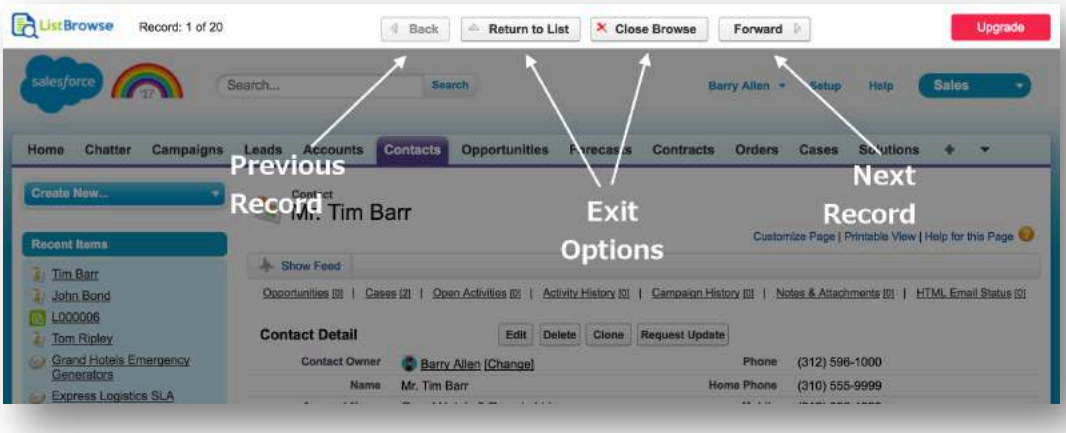
In Classic, List Browse allows you to first select the records you want to browse, click "Browse" to go to the first record.



Then, depending on if you are using the New version, or the older, Legacy version, your navigation will look different. Below is what List Browse looks like running Salesforce in Classic mode (in the Free version this works only with Contacts and Accounts):



And finally, this is what the Legacy Classic version looks like once you press the **Browse** button. Notice that the navigation is all at the top of the page.



Note: Due to a critical update from a few years ago, most Salesforce users will not be able to do a few important functions like Editing, or adding notes to the records as you browse. Most users need to close the browsing before doing these things. However, the new, Paid version, overcomes these restrictions.

A list of what each navigational element does is on the next page. We trust that you will find these are simple controls that will give you back time in your day.

List Browse Control Guide

These are the simple controls you will learn to use and hopefully love.

Control	Description
	This control, and its contrary twin, will take you one record either before or after the current one on the list. If it is grayed out, that means you are on the first or last record.
	This control, and its opposite, takes you to the first or last record on your list. If it is grayed out, it means you are already there.
	This button will show you a list of any Browse Lists that you have previously saved in the current object. By clicking on the name of the list, you will switch to that list as the active Browse List (and lose the current active Browse List).
	This button will allow you to save the current active Browse List with a name of your choice in order to pull it up later.
	This button will show you a list of all the records in the current Browse List. It allows you to skip ahead or behind to any particular record by clicking on it.
	This button will clear the current active Browse List and take you out of List Browse for the current object until you again click the Browse button, OR it will simply close the browse element until you have clicked Browse again, depending on what you have configured in the Configuration page.

The controls for the Legacy version are similar, without the ability to save or load lists, or to have a popup of the records being browsed.

Before You Begin, Requirements

Before you begin working with List Browse, you must have several components already in place and configured. We will not cover these components in detail, but will at least point you to where you can get the information you need.

Licensing

A production and/or sandbox system Salesforce.com Org will be needed in order to set up the integration. The following types of licenses are all supported:

- Sales Cloud
- Service Cloud
- Custom Cloud (Force.com)

Editions

At the current time, only the following editions will support List Browse. The Group edition is not supported.

- Enterprise
- Unlimited and Up
- Developer
- Professional* (most functionality)

Chapter 2

Installing and Configuring List Browse

In this chapter you will learn how to quickly install the app and then configure it for use in standard and custom objects

Several basic steps must be completed in order to install and configure List Browse in your Salesforce.com org, no matter which version you use. Any user with administrative skills should be able to install and configure the app.

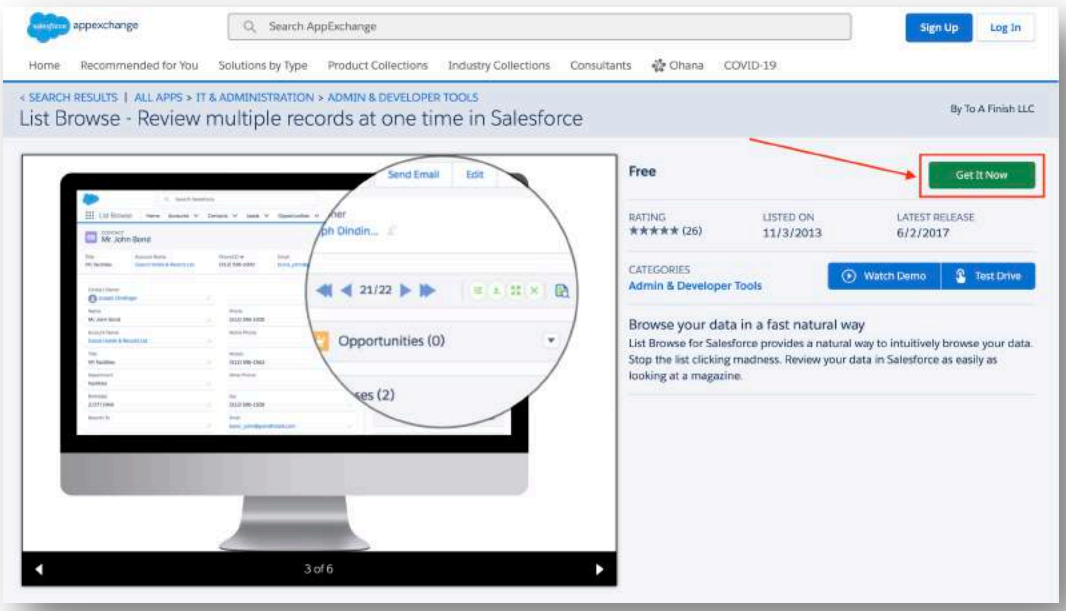
The main steps necessary to complete are listed below.

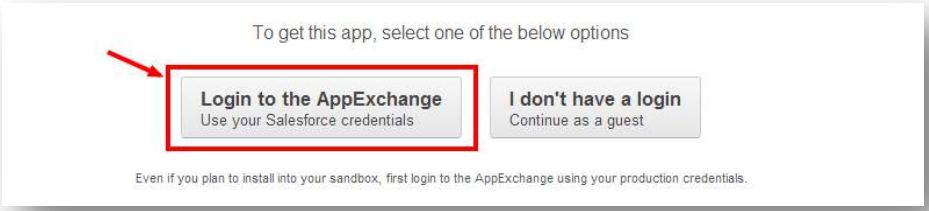
Step	Description
1	Install the List Browse app
2	Add the Browse button to the objects you want to browse
3	Create custom Browse buttons for any custom objects or other standard objects where it is needed
4	Add the Browse component to the layout (not in Legacy Classic)
5	Leave **List Browse** a 5-Star Review on the AppExchange! ☺

Installing the List Browse App

The first step is to install the app from the AppExchange. You should be able to find the app easily by searching for "List Browse" on the AppExchange.com website.

Click on the **Get it Now** button on the listing and log in to the AppExchange using your Salesforce.com credentials (if you are not already).



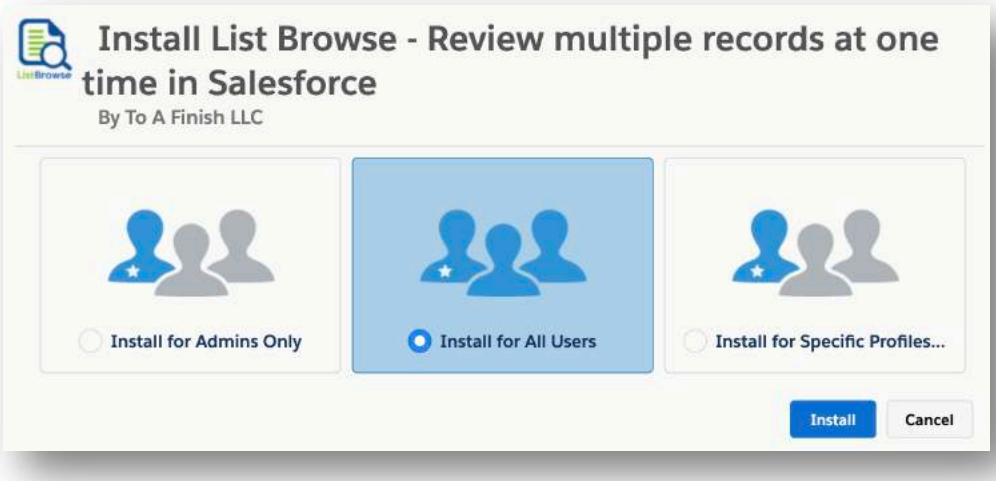


Next, you will need to decide the type of Org you want to install the app into. You can try List Browse in a sandbox first, but generally speaking you should be able to install it into a Production system with no adverse effects. After selecting one, click the **I have read and agree to the terms and conditions** (you might want to look at those first) checkbox and then press the **Confirm and Install!** button.





You will be asked to log in. Do so, and the installation will continue in your Org. After logging into the org you want to install into, go through the install process. The only important choice will be who to install for. Select **Install for all users** and press the **Install** button.



Configuring the List Browse App

Before you can use List Browse, you must simply add the **Browse** buttons to the six standard objects that are supported by default. The six objects that come standard are:

- Leads
- Accounts
- Contacts
- Opportunities
- Cases
- Tasks

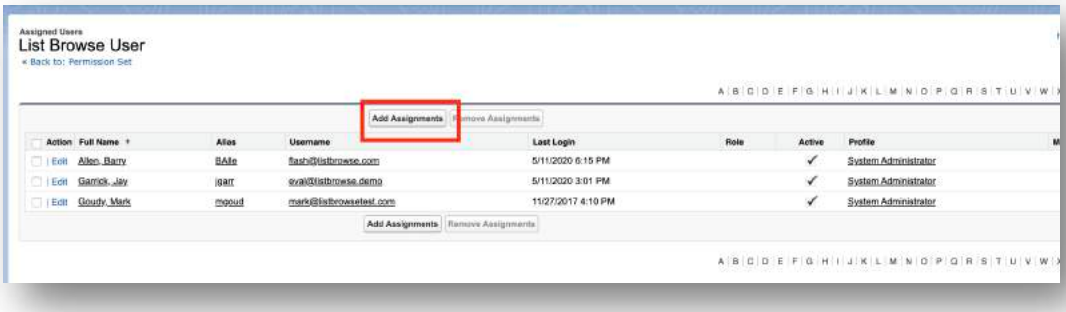
Note For most versions of Salesforce, you can create a Browse button for other standard or custom objects as well as the standard ones. Doing that is covered in the next section.

In order to add the Browse button, you must first go to the **Setup** section, by clicking the Setup link to the right of your name while in Classic. (The location of the Setup link depends on your version of Salesforce.com.)

Permission Set Setup

In order to have access to List Browse, users will need to be granted the List Browse User permission set. In the Setup area go to Users → Permission Sets and then click on the **List Browse** permission set. (You will also need to do this for regular users with the **List Browse (NonAdmin)** permission set.)

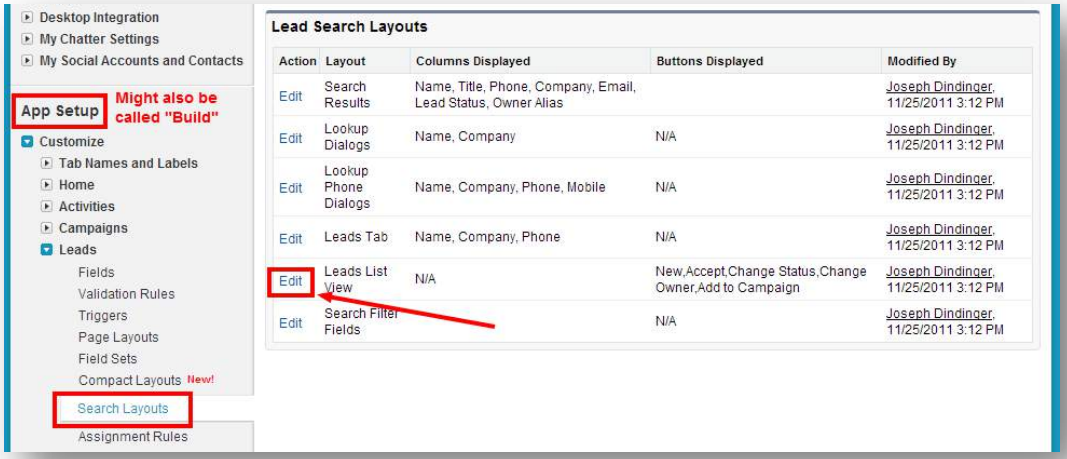
Now, click the "Manage Assignments" button and add all the users who will be accessing List Browse to this permission set, including System Administrators.



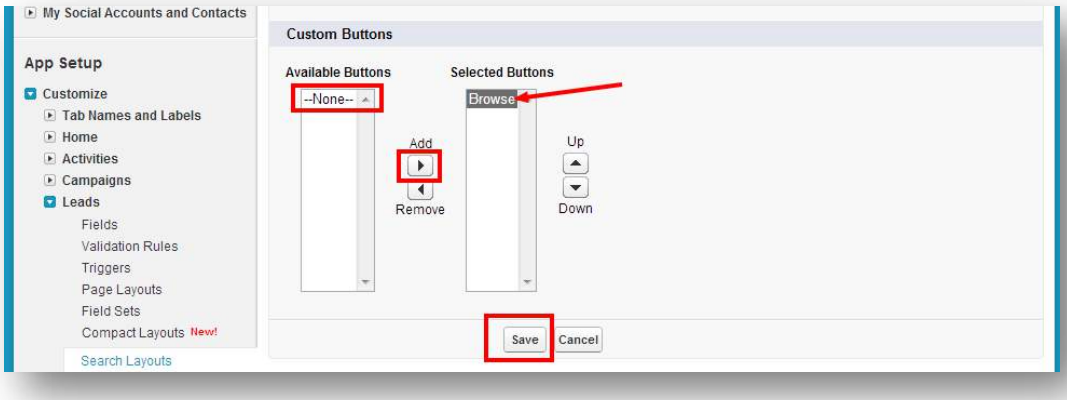
Now, you are ready to proceed.

Configuring the Browse Buttons

Once in the Setup section, you can expand Customize under either App Setup or Build, depending on your version of Salesforce.com. In this example, let's use Leads as the object to browse. Expand Leads and click on the Search Layouts menu item.



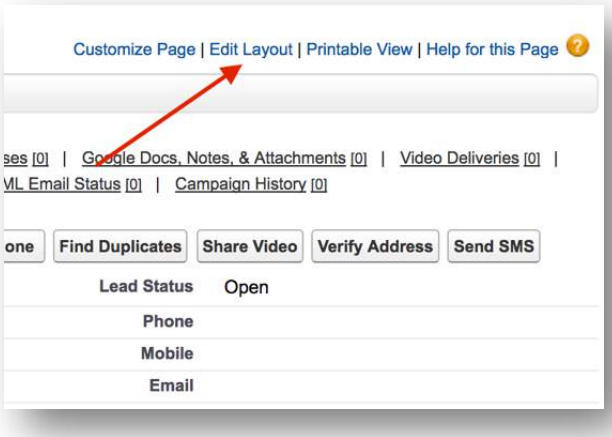
Edit the entry for Leads List View.



You will see the **Browse** and **Browse (Legacy)** buttons as options in the **Available Buttons**. Highlight the one you want by clicking on it, and press the Add button to move it into the **Selected Buttons**. Then press **Save** on this page.

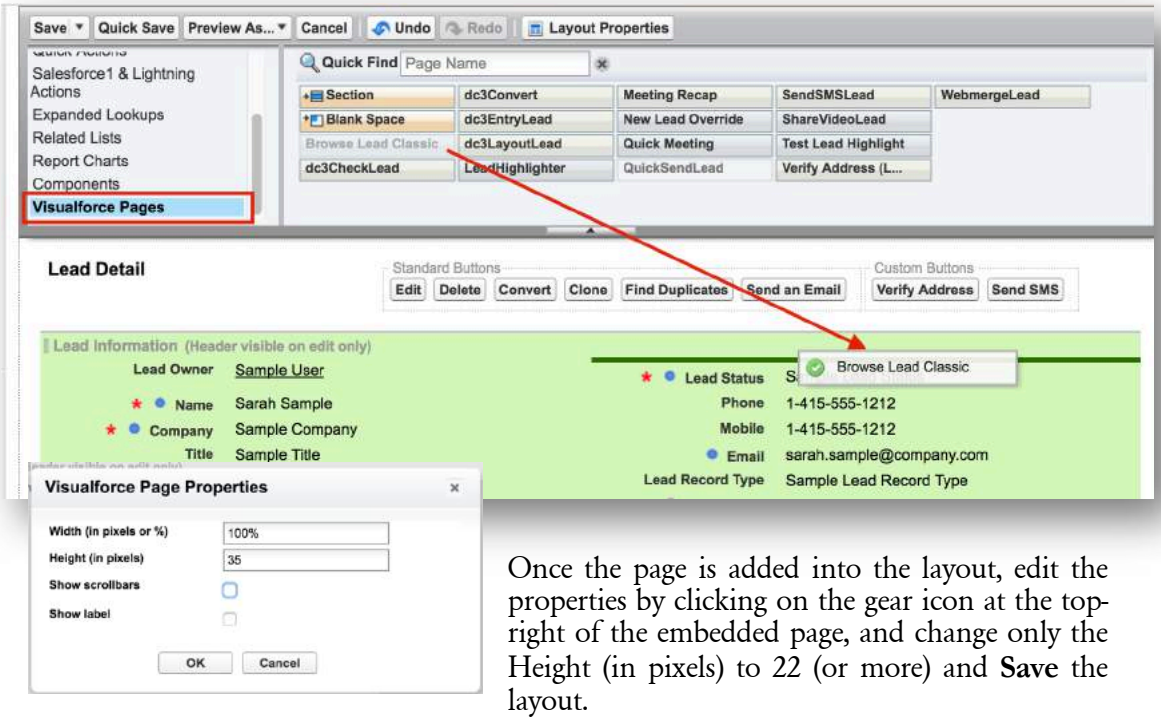
You are now finished adding the Browse button to all the Leads list views. You may now repeat the process for the Accounts, Contacts, Opportunities, Cases and Tasks in order to add the Browse button to those objects as well. If you selected the "Browse (Legacy)" button, that is all you need. If you are using the newer "Browse" button, keep reading.

Now go to the object you selected and open a list view where you can see the Browse button you just added. Select multiple records and press the **Browse** button. You will see that you are taken to the first record on the view.



Now edit the layout of the page by clicking the **Edit Layout** link towards the top right.

Select **Visualforce Pages** from the toolbar at the top and then find the List Browse page for the object you are in. If you are in Leads, select "Browse Leads Classic" and drag it somewhere onto your layout. We recommend the top-right of the page for our preferred user experience.



Once the page is added into the layout, edit the properties by clicking on the gear icon at the top-right of the embedded page, and change only the Height (in pixels) to 22 (or more) and **Save** the layout.

When you are returned to the Salesforce page, you should see navigation icons that allow you to browse the list of records you selected.

Keep in mind that the Free version of List Browse only allows browsing Accounts and Contacts. For other objects, you will need to upgrade.

** Note: if the list of records you selected has records with different page layouts, you might have to do the steps on the prior page multiple times.*

If you want to expand List Browse to use it in objects outside of Opportunities, Accounts, Contacts and Leads, please follow the instructions in the next chapter.

Troubleshooting

Critical Update Conflict with Legacy Classic

The **Enable clickjack protection for non-setup Salesforce pages** Critical Update, which was mandatory in the "Spring '14" edition is not currently compatible with the Legacy Classic edition of List Browse. The reason is that the Legacy Classic List Browse uses an iFrame which this Critical Update considers to be a page outside of Salesforce.com.

Because of this issue, your Legacy Classic List Browse experience will usually be read-only. We believe that this issue is an error that should be corrected in Salesforce.com directly. If you agree, please voice your support here:

https://success.salesforce.com/ideaView?id=0873000000l5khAAA

If you want to have List Browse in a read/write mode, you can upgrade to the Paid version, as shown in the next chapter.

Chapter 3

Advanced Configuration (Paid Version Only)

In this chapter you will learn how to quickly configure List Browse for usage in the Classic UI after paying for the upgrade

Several basic steps must be completed in order to install and configure List Browse in your Salesforce.com org. Any user with administrative skills should be able to install and configure the app.

The main steps necessary to complete are listed below.

Step	Description
1	Install and Configure List Browse as shown in chapter 2.
2	Go to www.ListBrowseApp.com and pay for the upgrade. If you have more than 10 users who need List Browse, please contact sales@toafinish.com for a discounted quote.
3	Add the Browse button to any of the 6 standard objects for Classic which come with the app
4	Add the List Browse Visualforce page into each object's layout
5	Create custom Visualforce pages for non-standard objects
6	Leave **List Browse** a 5-Star Review on the AppExchange! ☺

Note: Before going on, you must first install the List Browse app as shown in the previous chapter.

Purchasing the Upgrade

How many users will need List Browse? If ten (10) or less users, go to ListBrowseApp.com and pay for the upgrade. In the notes for the order, please include the Org ID of your Salesforce org, in case we cannot match you based on your email address.

If you have more than 10 users who need List Browse, please contact sales@toafinish.com for a quote rather than purchasing the licenses directly.

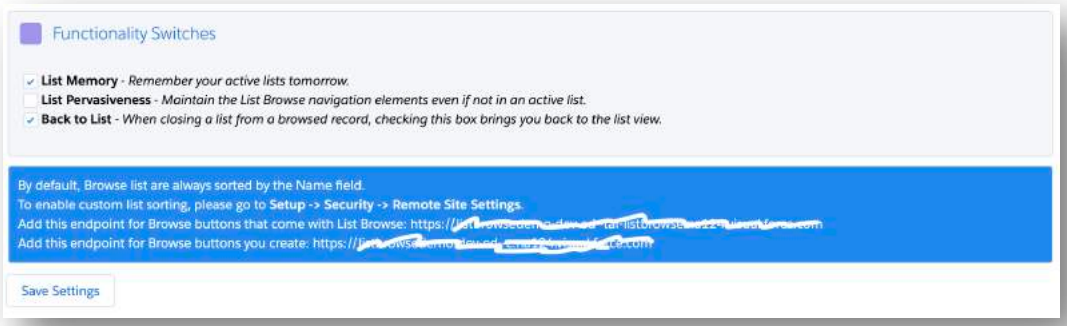
Once you have purchased the upgrade, allow 4 hours (usually much less) for your org to be upgraded. Once it is upgraded, you will be sent an email letting you know. You can proceed with the next steps at that time.

> ***Note: The "My Domain" feature in Salesforce must be enabled and deployed to users before you can use the Paid version. The reason is that it includes a Lightning Component, and My Domain is necessary for Lightning Components.***

List Browse Configuration Page

To configure how List Browse works, you will want to go to the List Browse Configuration page by going to Setup → Installed Applications → List Browse → Configure.

Once on the page, there are a few things you can configure:

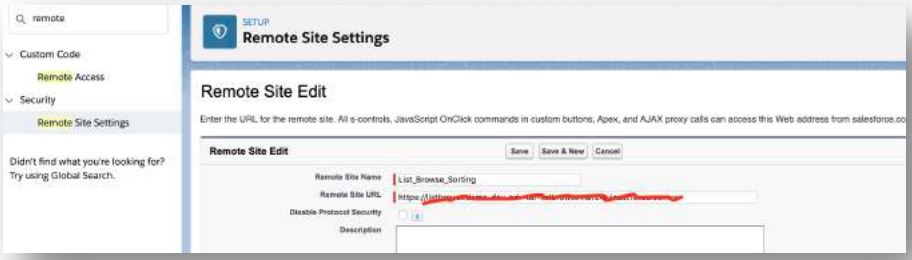


1. Enable **List Memory** in order to "remember" your active Browse Lists from day to day. Without this, you may have to start over each day.

2. Enable **List Pervasiveness** in order to always have the List Browse component visible on the page, whether the current record is being browsed or not. Without this checked, if the "X" button is pressed, the List Browse component will disappear until you press the Browse button again.

3. Enable **Back to List** to send the user back to the List view when they press the "X" button on the navigation. Without this checked, pressing the "X" will merely delete the active list and leave the user on the current record.

This page will also instruct the user to add remote sites to the Salesforce org in order to sort the Browse Lists according to what the user sees on the screen. The sites given in the instructions are merely the current org's own URLs, but they are needed in order to use the tooling API to find the sorting of the list. If the given sites are not added to the list of remote sites as described, then all List Browse sessions will sort on the Name field, regardless of how the list was sorted.



To add the remote sites go to Setup → Security → Remote Site Settings click the **New** button to add a site. Once you add both sites, refresh the Configuration page and you should see the messages disappear.

Adding List Browse to More Objects

Besides the five standard objects that come with the app, you can Browse virtually any other object. To do so, go to Setup → Custom Code → Visualforce Pages, and press the **New** button to create a Visualforce page that will be used by the "Browse" button. Simply copy the code below into a new Visualforce page, changing the highlighted area with the API name of the object you choose.

Custom "Browse Button" Visualforce Page

```
<apex:page
  standardController="MyObject__c"
  recordSetVar="myrecords"
  extensions="taf_listbrowse.PassSelectedRecordsExt"
  showHeader="false"
  action="{!createListRecord}">
</apex:page>
```

Next, create another Visualforce page that will be embedded as you did in steps above for the standard objects. Simply create the page using the code below, changing the highlighted areas with the API name of the object you selected (do **not** select the Lightning option):

Custom "Embed" Visualforce Page

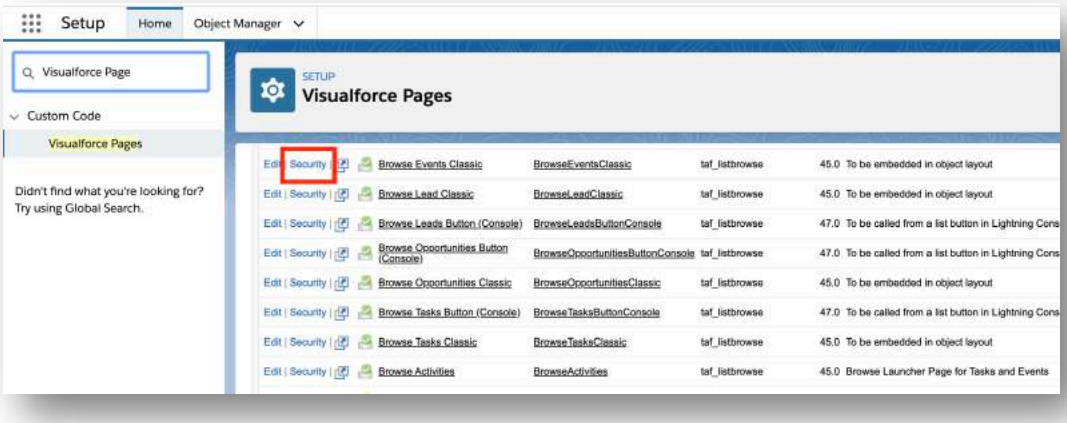
```
<apex:page
  standardController="MyObject__c"
  showHeader="false">
    <taf_listbrowse:ListBrowseClassic />
</apex:page>
```

You can find the above code in the "pages" folder in our GitHub Repository.

GitHub.com List Browse Sample Code Repository

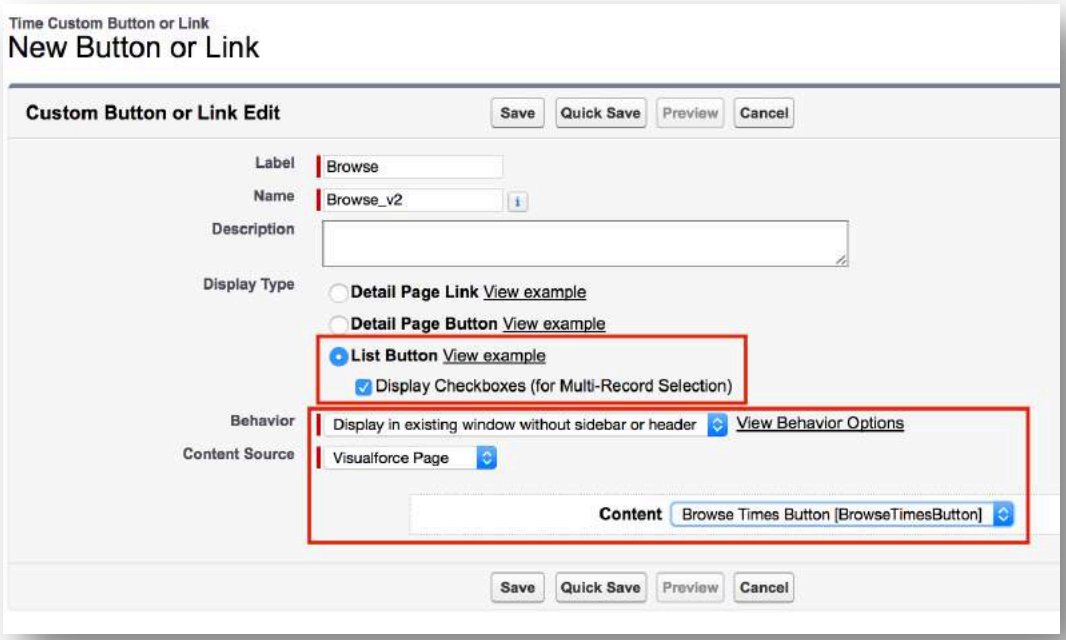
https://github.com/ToAFinish/listbrowse

Next, you will need to modify the Security of these two new pages if you want anybody besides a System Administrator to be able to use them. Simply click on the **Security** link next to the page name when looking at your list of Visualforce pages, and select which profiles should have access to it.



Note: if you do not update the Security of your page, your non-Admin users will get an error saying they have insufficient access.

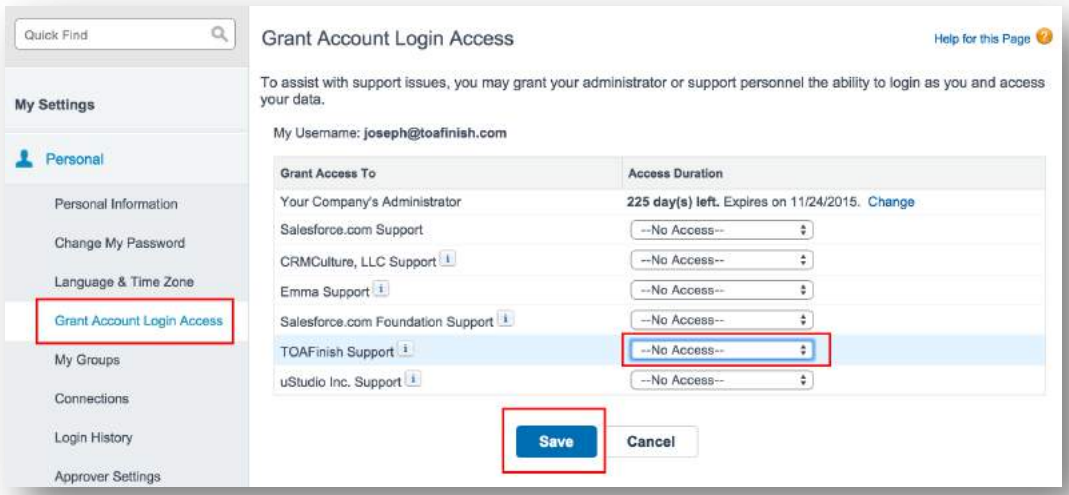
Now, you must add a button for your selected object that uses the "Browse Button" Visualforce page you created above. The options needed are shown below, but the screen will look a little different, depending on the object you selected to add to.



Finally, you need to do the steps referenced in the prior chapter, titled "Configuring the Browse Buttons" to add the button and embed the page for the object you are extending List Browse into. Good luck!

Feedback and Support Access

Please send us your feedback to support@toafinish.com, and don't hesitate to email if you have questions about these instructions. When you do, you might want to give us remote access, as shown in the screenshot below, so that we can log in as you to see the problem.



Rating List Browse

We greatly enjoy being able to provide users with and app they will find useful. So, if you like the app, please leave us a positive review on the AppExchange:

https://appexchange.salesforce.com/listingDetail?listingId=a0N3000000B3fiZEAR

But if you run into issues, *please* don't leave them there for the world to see (unless we can't get it resolved). Rather, contact us at support@toafinish.com and we'll work together to make this app To A Finish™.

Thank you!

The To A Finish™ team.