



HIGHLIGHTER

IMPLEMENTATION GUIDE



TO A FINISH

HIGHLIGHTER FOR SALESFORCE

Implementation Guide

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Introduction to this Implementation Guide

Introducing all the key components of the Highlighter App for Salesforce.com

This manual will help you through the implementation of the Highlighter app for your Salesforce.com Org. You can read this chapter if you desire to do so, but most users can probably start at the next chapter, where the installation and configuration instructions begin.

Thank you for considering our app in your organization.

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

To succeed in the installation process, you will need to pay close attention to all of the information contained in this manual. We recommend reading through this first chapter before you begin, and then reading through each section as you work on it.

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 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



TO A FINISH

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 the Highlighter App



Salesforce.com allows you to customize standard layouts to a great degree. However, one thing you cannot do is highlight or dynamically change elements. Now, you can highlight virtually any field on a page.

Encourage the right process and highlight important elements on most Salesforce.com records. Until now, contextual highlighting has only been available in reporting. Now you can highlight, dynamically rename, or hide virtually any field on a page.

Use your imagination and mold the Salesforce.com standard layout to:

- Bring attention to fields that are important
- Color elements showing the process next steps



Highlighter

In the past we have maintained a paid version of Highlighter, with paying customers having access to more actions. However, the cost of maintaining this app as a freemium or paid solution is too high for the prices we have historically charged for licenses (we would lose money for every paid customer) so we have decided for the time being, to make this a free app. We hope to build out value in order to increase the licensing price, but in the meantime, please enjoy.

It is time. *Make Salesforce.com yours!*

Before You Begin, Requirements



Before you begin working with our app, 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.

Salesforce.com

A production system Salesforce.com Org will be needed in order to set up the integration. A sandbox will be very helpful in this process as well. Any edition of Salesforce.com should work.

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

Warning: Test First!



Before you deploy this solution to your production Org, it is strongly recommended that you test it in a sandbox first.

Please always test any admin app of this type first.

Test. Test. Test.

Highlighter is really on the cutting edge of what Salesforce.com can do in its current user interface, so we are expecting to discover some problems along the way. Help us out with feedback!

If you like the app, please leave us a positive review on the [AppExchange](#). But if you run into issues, *please* don't leave them there for the world to see. Rather, open a case as shown on the last page of this document, and we'll work together to make this app To A Finish™.

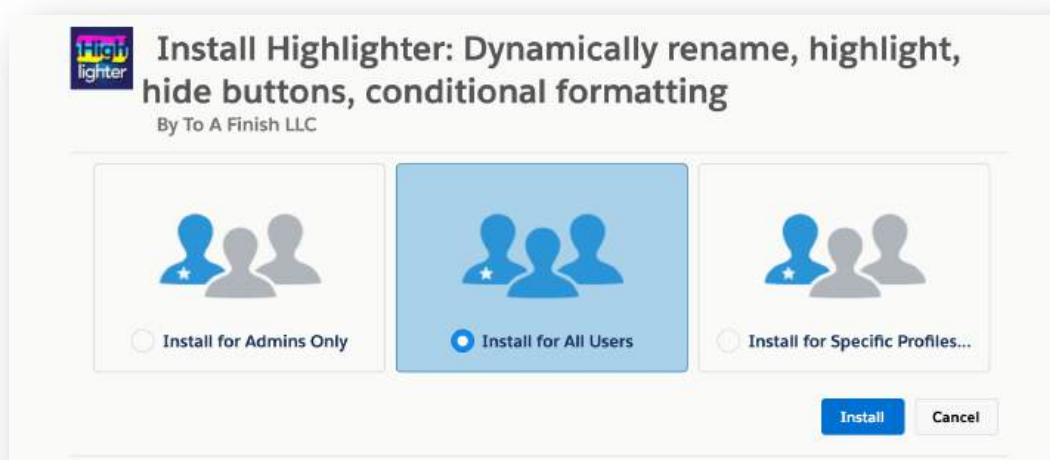
As a free app (as of 2026) we are not able to offer support for implementation or configuration, but if you run into a real bug, please report it and we will do our best to squash it.

* Note: This app does not currently work with **Mobile**.

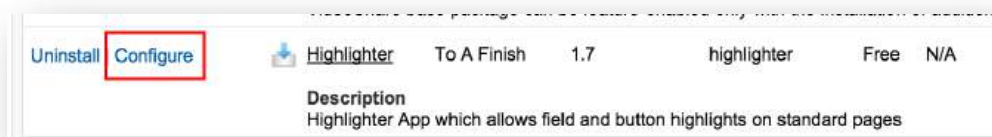
Configuration

The steps necessary to set up the app for full use

The initial steps in the configuration are completed by first installing the package from the AppExchange.com app store. Make sure to **Install for All Users**. Even though only an Admin will configure it, you need to install for All Users so that they can access the pages correctly.



Next, click: Setup → Installed Packages and click on the **Configure** link next to the Highlighter package.



Setting up Your Org's "Remote Site"

The first thing you will see when you go to configure your Highlighter app, is a warning telling you that you need to set up a "remote site" before you can use the app. "Remote site" is the term used for the URL to access your Org's metadata.

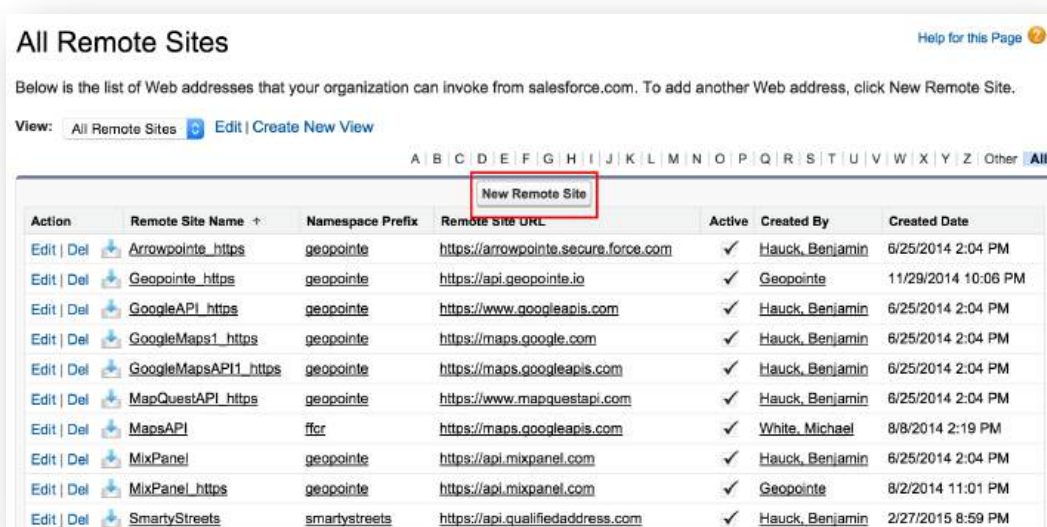
** Please note that To A Finish (the makers of this amazing app) cannot access your Org as this term might imply to some. This step is necessary so that you can access your own metadata (data about your data, in this case fields and buttons) through our app.*

Read more about the Remote Site settings from the Salesforce.com Developer documentation [here](#).



If you see this error, please follow these steps:

- 1) Copy the **endpoint** indicated in the error, starting with the "https://" and all the way through the end.
- 2) Now, go to: Setup → Security → Remote Site Settings.



- 3) Click on the **New Remote Site** button.

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4) In the Remote Site Edit dialog, enter any name for the **Remote Site Name**, and then paste the URL you copied in step #1 into the **Remote Site URL** field.

5) Make sure the **Active** checkbox is enabled, and press the **Save** button.

6) Now go back to configure Highlighter. Go to: Setup → Installed Packages and click on the **Configure** link next to the Highlighter app.

You should see the Highlighter setup page, alerting you that you have not yet set up any Highlighter Actions.



Configuring Actions

To add a new action, follow these steps. If you get lost along the way, please ask a more technical person to help. You can contact us (see the last page for case info) if all else fails. While we can only provide support at an hourly charge (since this is now a free app), we will attempt to answer any quick questions that come in via email.

- 1) Click the **New** button.

- 2) Select the object you wish to highlight from the **Object** dropdown.

**Note: a few standard objects, like the Quote object, are not compatible with Highlighter.*

- 3) Select one of 7 options from the **Action** dropdown. These options are described below (buttons are currently not controllable in Lightning):

Action	Description	Lightning
Highlight Button	<i>This allows you to color a button on the page for the object selected.</i>	No
Highlight Field	This allows you to color the background of a field on the page for the object selected.	Yes
Disable Button	<i>This allows you disable a button. Users will still see it, but won't be able to click on it.</i>	No
Hide Button	<i>This will actually remove the button from the layout.</i>	No
Rename Button	<i>This will rename the wording on a button.</i>	No
Rename Field Label	This will rename what the field is called on the screen.	Yes
Hide Field	This is used to hide a field from the layout. This will leave a blank space where the field used to be.	Yes

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- 4) Select a component from the **Component Name** dropdown. If you selected "Highlight Field" as the Action, then a list of all fields in the selected object will be available. If you selected one of the other options, then you will see a list of buttons for the object.
- 5) If you selected an Action that requires a **Color**, you have two options.
 - a. First, you can click into the field to choose which color you want; or type in the color *code*, if you are the digital artist type.
 - b. Second, you can select a **Background Formula** for the color. The formula field you select must display a color code. By using this technique, you can show different colors depending on whatever criteria you build into your formula. This is recommended above creating separate actions on the same field.



Note: To select nice colors, you use a website like [this one](#) to select a nice color code, or if you can copy Salesforce's [Lightning design colors](#).

- 6) Use the same technique to select a **Font Color**, or we often recommend using the **Automatically Select Color** option, which does not ask for a particular color, but will rather use either white or black, depending on the shade of the background color you selected. This avoids having hard-to-read fields.
- 7) If you selected the "Rename Button" Action, then you can enter the new button name in the **New Value** field.

At this point you are done with your action IF you want it to always happen.

A screenshot of the "New Action" dialog box in Salesforce. The "Object" is set to "Account" and the "Action" is "Highlight Field". The "Component Name" is "Account Name (Name)". The "Background Formula" is set to "--none--". The "Color" is set to "#4DB626". The "Font Formula" is set to "--none--". The "Font Color" is set to "Automatically Select Color". The "Only Valid For" field is set to "All". There are "Add Filter", "Cancel", and "Save" buttons at the bottom.

- 8) If you want the current action to only apply to a subset of users, then update the **Only Valid For** element to specify:
 - a. User,
 - b. Profile, or
 - c. Public Group.
- 9) Then, a new dropdown will show up, allowing you to further specify the subset of users to attach to. If you want this to always show up, depending only on filters, then leave this set to “All.”
- 10) If you want this action to only happen *sometimes*, press the **Add Filter** button. This will open up a new area for a filter.

Delete	Field	Operator	Value Type	Value	And/Or
	--none--				--none--

- 11) Select a field from the **Field** dropdown. These will be the fields from the Object you selected in step 2. Note that the field you select here does not have to be the same field you may have selected in the Component Name above. This field is the one that will dynamically determine IF this action should take place.
- 12) Select an **Operator** from the dropdown list.
 - Choosing “==” means **equals**,
 - Choosing “!=” means **not equals**.
- 13) If the field you selected is a Date or Date/Time field, then you must select an option in the **Value Type** field. This allows you to either specify a particular date or date/time or select from a list of Date Literals, like TODAY, NEXT_WEEK, THIS_YEAR, etc.
- 14) Type in a value into the **Value** field. Values can be entered here directly, or for picklists, checkboxes or date literals, values can be selected.

Note: We recommend that you use as few filters as possible in order to cut down on the time it takes for the page to load. If you have multiple filters for a particular action, the best practice is to create a Boolean formula field that gives you either a True or False result, and then use that here. However, you are also able to create multiple filters on one action. To do so, continue reading.

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- 15) Click the **Add Filter** button again to add an additional filter, if necessary. Once you do this, you should go back to the first filter you added and select an option from the "And/Or" dropdown.

&&	This filter AND the filter below need to be true in order for the action to run.
	This filter OR the filter below can be true in order for the action to run.

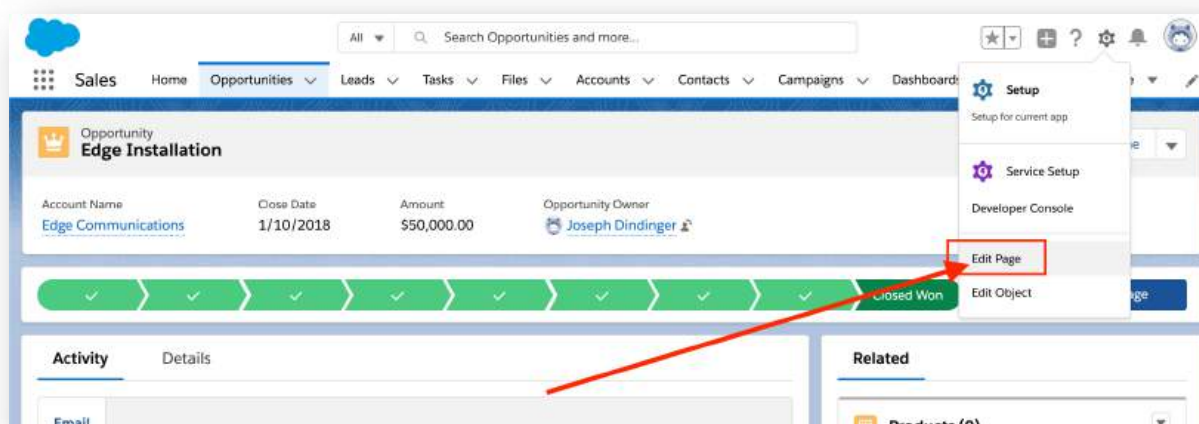
Note: we do not support nested filters or mixing && and || filters. Use formula fields for that.

- 16) Once you are done adding your filters, press the **Save** button and you will be taken back to the list of Actions.

Turning ON Highlighter

Once you have created actions for one or more objects, you must follow these steps to turn it on for all of your users.

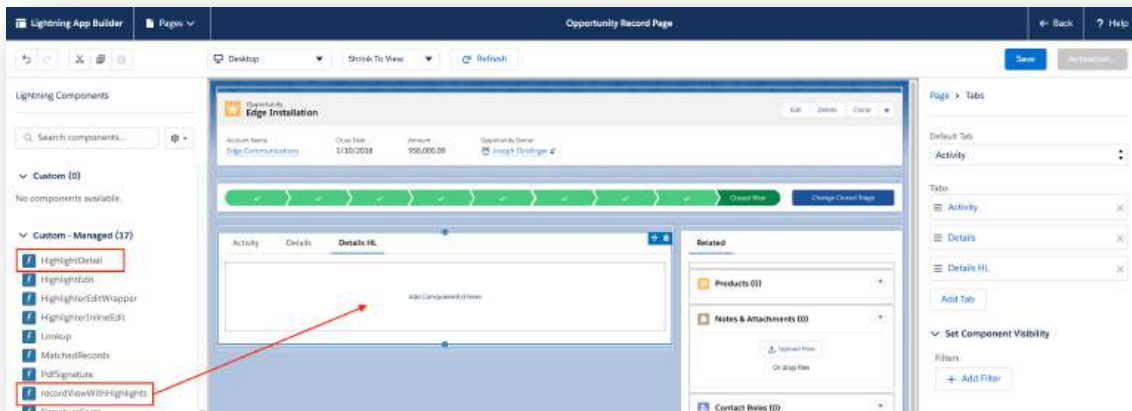
- 1) Browse to a record from the object you want to Highlight. In this example, we will use Opportunities.
- 2) Click on the **Edit Page** from the gear icon at the top-right of the page:



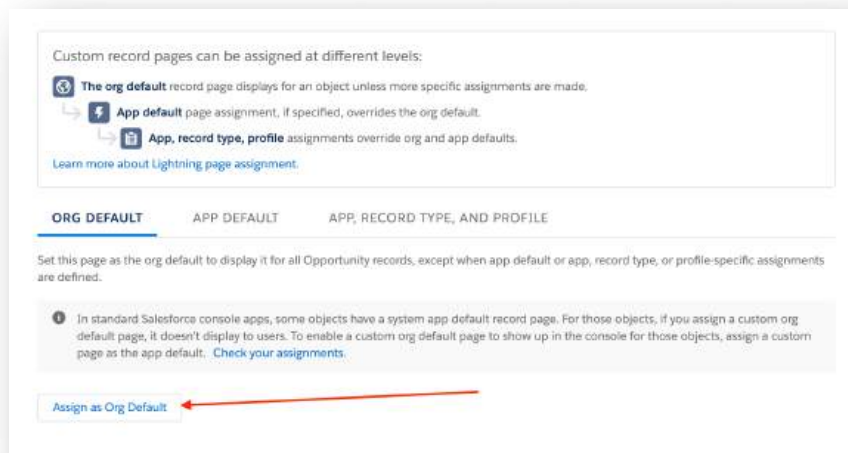
- 3) The page in the middle should look like the page that you are currently using. The first thing to do is to create a tab to put the Highlighter record detail in.
 - a. Click by the "Details" tab, then press the **New Tab** button to add a new tab. Give it a name like "Details HL" which we did here.

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- b. Drag the **recordViewWithHighlights** custom managed component to this new tab area. (Ignore the older **HighlightDetail** one.)

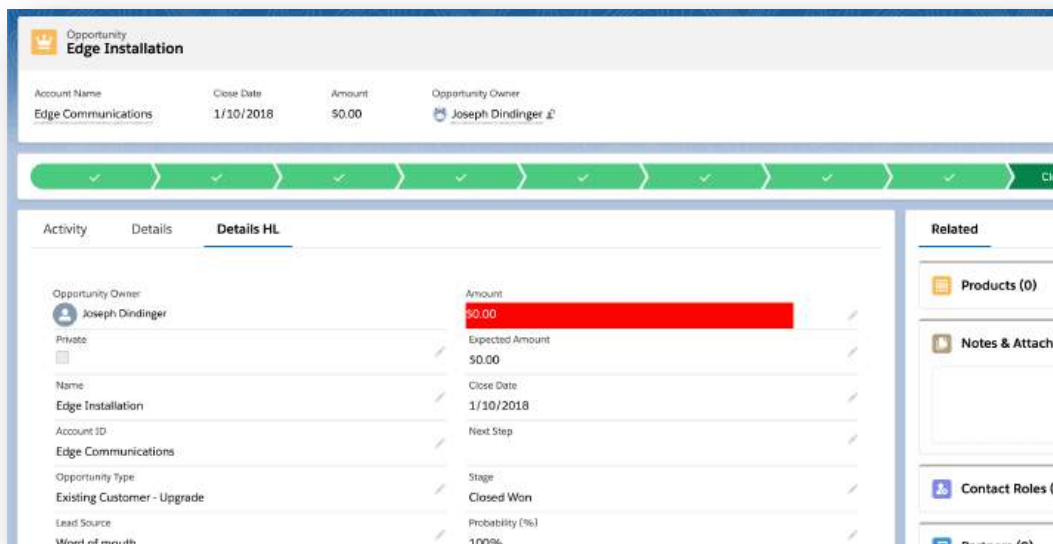


- c. After a few seconds, you will see the custom Lightning Web Component grow into a detailed view of the record. Once this happens (or if it doesn't happen within a few seconds) press the **Save** button at the top-right.
- d. You can click on the component after adding it, and a panel on the right of the page will let you choose if you want to show maps next to the standard addresses on the form.
- e. If this is the first time you have edited this object's Lightning layout, you will be asked to **Activate** the page. Go ahead and do that. You will then be presented with the options shown below. Press the **Assign As Org Default** button, and then choose "Desktop" press **Next** and **Save**.



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- f. Now press the **← Back** button at the top and it should take you back to the record view, this time with a new tab.



Note: Once you are satisfied that this tab is working well, you can, of course, replace it by removing the other "Details" tab, and renaming your new tab as desired.

Advanced Topics

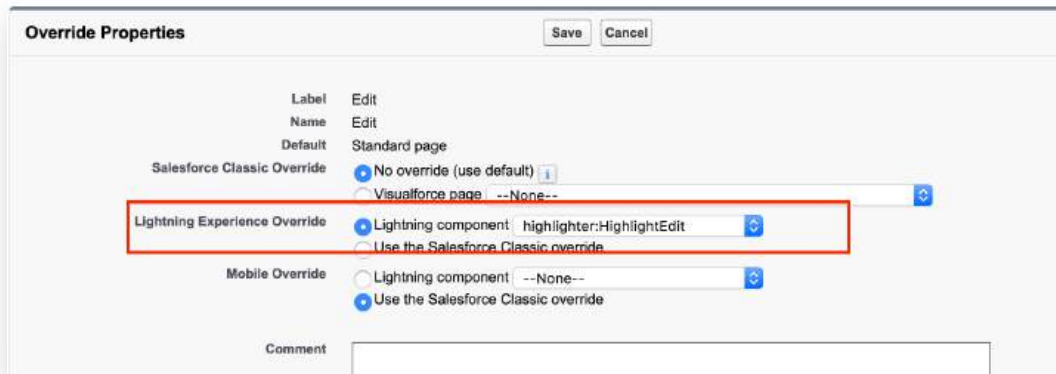
The Highlighter for Salesforce app works great for many users, there is more that can be done with our app. Please keep in mind that the following pages assume a somewhat higher level of technical ability. If you need our help, we are available for an hourly fee. Please see the last page in this guide for contact information.

Editing With Highlights

Custom Edit Pages

The **recordViewWithHighlights** Lightning Web Component includes built-in inline editing, with support for field Highlights, so setting up the Edit page with highlights might not be necessary. However, if you desire to do so, you can set it up with the instructions below:

- 1) Go to Setup → Object Manager and navigate to the object you wish to set up.
- 2) Click on “Buttons, Links and Actions” on the left. Click on **Edit** to change the standard Edit action.
- 3) Now select “HighlighterEdit” as the Lightning component to use, and **Save**.



- 4) Now wait 10 seconds (seriously) and refresh the page multiple times on the record where you want to use the custom Edit screen. It will take Lightning a while to figure it out, but eventually you will be presented with a new version of the Edit page with highlights. You will know it has happened when the popup screen is slightly wider and takes a bit longer to load.

Highlighting Dynamic Components

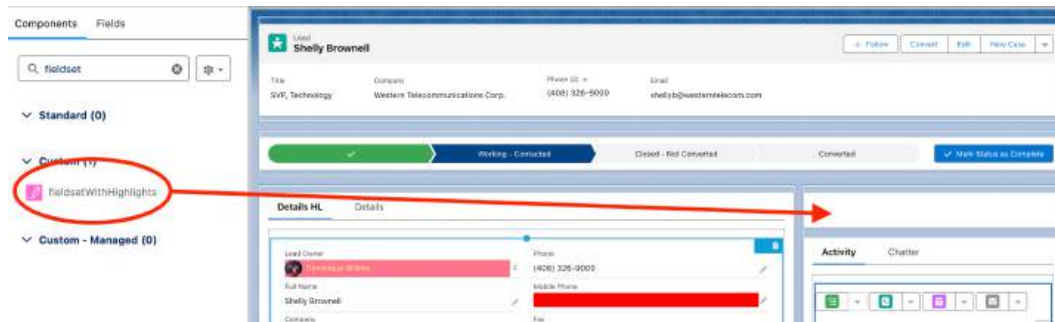
Custom Highlights Based on Field Sets

The **fieldsetWithHighlights** Lightning Web Component includes built-in inline editing, with support for field Highlights. This component can be added to a record page in the Lightning App Builder one or more times, each one independent of the others, and of the main record detail page. Follow these instructions to set it up

- 1) Go to Setup → Object Manager and navigate to the object you wish to set up.
- 2) Click on “Field Sets” from the menu on the left. Click the **New** button to create a new field set, or click on the name of an existing field set to modify it.
- 3) Once the field set editor, drag fields down into the “In the Field Set” area from the list of fields atop, or drag fields out of this area and back into the field list in order to remove them.
- 4) Click the **Save** button to save the field set.
- 5) If you have already created a Lightning Record page, then simply click the “Lightning Record Pages” link from the menu on the left. If not (this list would be empty), go back to Salesforce and Browse to a record from the object you want

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to Highlight. In this example, we will assume you are on Leads, and click on the Edit Page from the gear icon at the top-right of the page:



- 6) The page in the middle should look like the page that you are currently using. Drag the **fieldsetWithHighlights** components to a location where you want to display this set of fields on the page.
- 7) Click on the component you added to the page and make the following updates to the parameter fields:
 - a. **objectName** – click into the field to select the object to highlight. Today, it will be only the current object.
 - b. **Enter Layout Title** – Type a title for this component. If left blank, it will simply say the object name.
 - c. **Choose Field Set** – Click into the field to select the field set you created in steps 2-4.
 - d. **Enter Icon Name** – If left blank, it will default to the icon for the current object. If you want a custom icon, you can enter it by using the **icon_type:icon_name** format, using the icons in the Lightning Design System: <https://www.lightningdesignsystem.com/icons/> - the four icon types are: utility, doctype, standard, and action. Each of these then has a number of icons available. For example, if you wanted to show the soccer (football for you purists) ball towards the top, you would enter **utility:activity** as the value.
 - e. **No. Of Columns** – Select 1 or 2 columns.
- 8) Now, verify that everything looks good on the component (it should be modified as you add each parameter), and press the **Save** button at the top-right of the screen. Wait a couple seconds, and then you can press the **←** icon at the top-left of the screen to take you out of the Lightning App Builder.
- 9) You can repeat these steps to add as many different field sets to the page as you want. Each works independently, so if you have the same field on different

components, you might need to update the page manually to see the highlights change in a different component.

Options

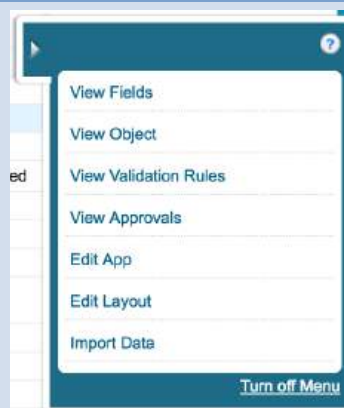
A few features are available only by opening a case with us (see the last page in this guide). We will need to either remotely access your org to set these up for you, or in some cases, we may be able to talk you through the setup.

Currently, we have an Options button at the bottom of the app configuration page. Several options are available, as described below:

The screenshot shows a dialog box titled "Options". It contains a section for "Lightning Only" with two options: "Hide Logo And Refresh" (checked) and "Background And Border" (unchecked). Below this are three expandable sections: "Classic Only", "Action Suppression", and "Field Suppression". At the bottom right are "Cancel" and "Save" buttons.

Lightning Only	
Hide Logo and Refresh	Hide the logo and the Refresh Button from the bottom of the detail page.
Background and Border	Add Background and margin when adding the component without tab
Classic Only	
Do Not Refresh	Do not refresh page after highlights come through.
Hide Edit Layout	Do not show the "Edit Layout" link at the top of the page. (Speed Improvement)

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Quick Access Menu	Show Quick Access Menu for users. (Enabling slows page down a bit.).	
Action Suppression		
Stop Disable Buttons	These options allow you to potentially speed up the application by not checking for this type of actions. Note: buttons are currently available only in Classic, so they are irrelevant for the Lightning install.	
Stop Hide Buttons		
Stop Hide Fields		
Stop Highlight Buttons		
Stop Highlight Fields		
Stop Rename Buttons		
Stop Rename Field Label		
Field Suppression		
Disable Checkbox Fields	These three options allow you to potentially speed up the application by ignoring these fields when canvassing for potential Actions.	
Disable Formula Fields		
Disable Long Text Fields		

** Please keep in mind that these options are all or nothing settings. We cannot turn them on for only one user. It must be for all.*

Not Yet Working

A few things do not yet work with Highlighter for Salesforce. These are known deficiencies but if they are important to you, please let us know. The more we hear from customers, the more we will know which functionality to dedicate the most time to.

- 1) Salesforce Mobile is not currently compatible with Highlighter.
- 2) Other items have been delivered...

BETA Features

We are in the process of building out a few features that are not yet available via the configuration page, and have not yet been documented. If you wish to participate in the trial of any of these items, please let us know. Since this is a free app, we do charge to participate in our beta programs. These features require us to spend our time to manually set them up in your org (in a sandbox first, and then in production), so we cannot offer them for free.

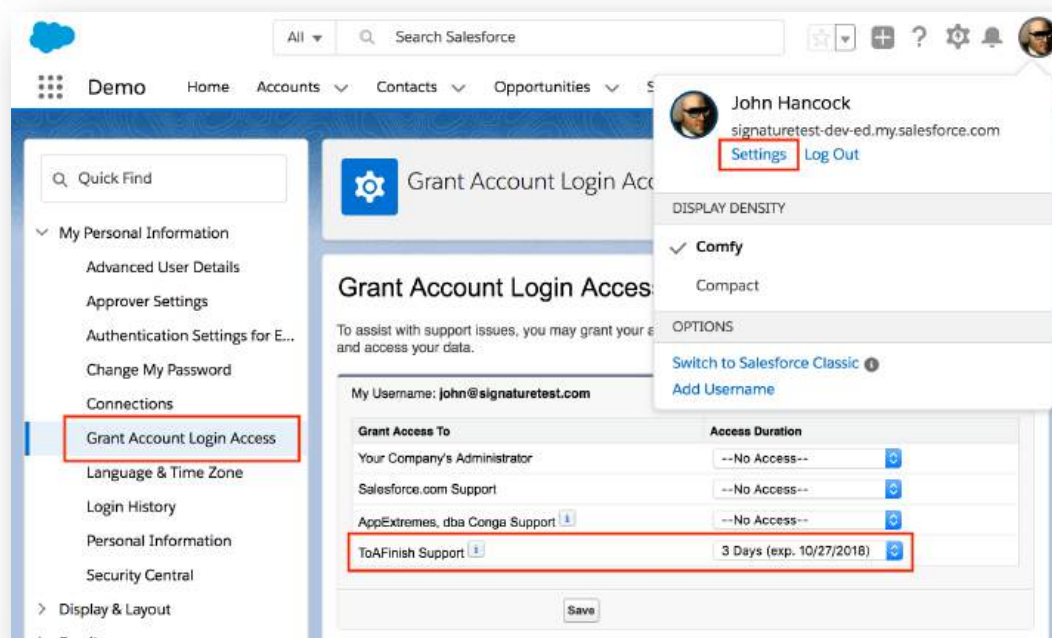
- 1) **Lookup Field Hover Replacement.** In the standard version of Salesforce, each Lookup field on the layout has a “hover” function that will show you a very limited number of related fields. For example, if you are on a Contact or an Opportunity and hover over the Account Name field, it will show you the limited number of fields that are configured at the top of your Account page, and a related list of Opportunities. With the Lookup Field Hover Replacement, you can configure a much larger number of fields to show up when you hover.
- 2) **Printable View Replacement.** The standard “Printable View” button takes you to a new page with all the fields and related lists on it for the current record. With the Printable View Replacement, you are able to put your own logo at the top, and specify which fields should be shown for an Internal or Client-Facing printable page.

Feedback and Support Access

If you run into any issues, please open a case with our support team:

<https://www.toafinish.com/support/>

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 Highlighter

We greatly enjoy being able to provide users with an 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=a0N30000000q40xEAI>

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, open a case using the link at the top of the page, and we'll work together to make this app To A Finish™.

Thank you!

The To A Finish™ team.