



Current Version: BYOB v1.21 Community

Version Number: 1.21

Release Date: 2025-08-17

Installation URL:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04ta5000009e6PhAAI>

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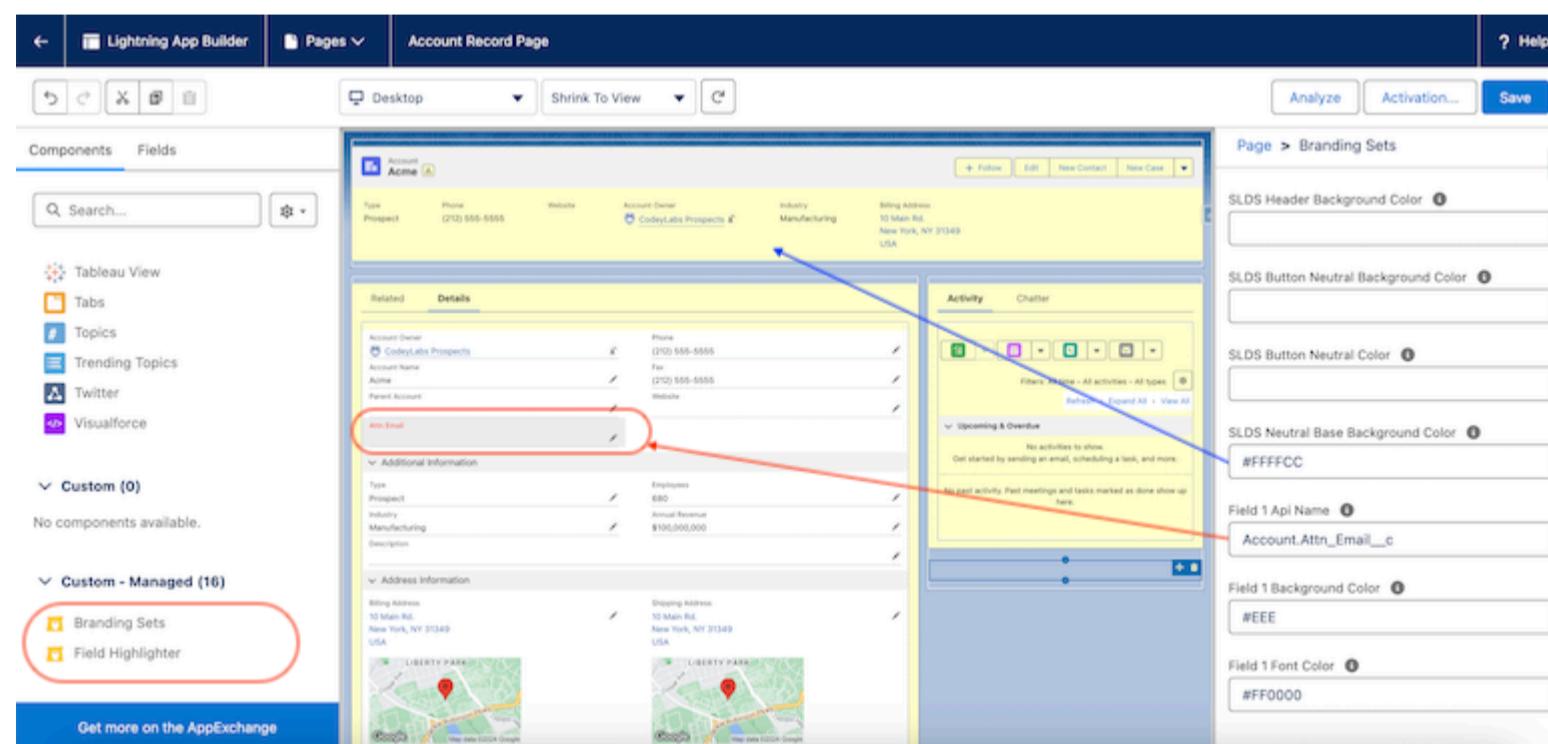
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1. Introduction

1.1 Overview

Build Your Own Branding is a comprehensive package designed for Salesforce users to customize the look and feel of their record pages. This package includes two powerful components: **Branding Sets** and **Field Highlighter**. Together, these tools allow organizations to align Salesforce with their brand identity, enhance user experience, and improve the visibility of critical information.



1.2 Key Features

- **Custom Color Schemes:** Tailor the appearance of record pages with **Branding Sets**.

- **Field Highlighting:** Draw **attention** to important fields with custom highlights.
- **Role-Based Customization:** Apply different themes and highlights based **on user roles**.
- **Event-Themed Branding:** **Temporarily** change themes for **special events or campaigns**.

The screenshot shows a Salesforce Lead record for 'Jim Steele'. The lead details include Title: Senior VP, Company: BigLife Inc., Phone: (555) 555-1212, and Email: info@salesforce.com. The lead status is 'Unqualified'. A yellow highlight is applied to the 'Rating' field, which is set to 'Hot'. The status bar at the bottom of the page also has a yellow highlight. On the right side, there are buttons for generating PDFs and a related leads section.

1.3 Benefits

- **Enhanced Brand Identity**
 - Keep Salesforce aligned with your corporate branding.
- **Improved Usability**
 - Help users quickly identify key information on record pages.
- **Increased Engagement**
 - Use custom themes to promote events or highlight critical data.

2. Getting Started

2.1 System Requirements

- Latest package available for **Salesforce Enterprise, Unlimited and Developer Editions**.
- **Salesforce Lightning** Experience.
- Supports **Custom or standard** Salesforce objects record pages.

2.2 Installation Instructions

1. Find the latest version installation URL mentioned in the starting of this document
2. Login to your salesforce org, and select install for all users, and accept.
3. Click **Install** and follow the on-screen instructions to install the package in your Salesforce org.
4. After installation complete, Ensure your **license is active** for the components.

Search Setup

SETUP

Installed Packages

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page. To remove a package, click Uninstall. To manage your package licenses, click Manage Licenses.

Visit AppExchange »

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date	Limits	Apps	Tab
Uninstall Manage Licenses	Feedback360	CodeyLabs	2.2	pscsmf	Active	Unlimited	0	<input type="checkbox"/>	Does not Expire	8/5/2024, 7:32 AM	<input checked="" type="checkbox"/>	1	
Build Your Own Branding	CodeyLabs	1.11	pscyby	Active	Unlimited	0	<input type="checkbox"/>	Does not Expire	7/17/2024, 3:19 AM	<input checked="" type="checkbox"/>	0		
Dynamic Rich Text Editor	CodeyLabs	5.7	psodnrichtext	Active	Unlimited	0	<input type="checkbox"/>	Does not Expire	7/27/2024, 2:20 AM	<input checked="" type="checkbox"/>	0		
Journey Map Builder	CodeyLabs	1.5	pscjmfb	Active	Unlimited	0	<input type="checkbox"/>	Does not Expire	7/20/2024, 3:37 AM	<input checked="" type="checkbox"/>	0		
Lightning PDF Generator	CodeyLabs	1.1	clpdf	Active	Unlimited	0	<input type="checkbox"/>	Does not Expire	7/18/2024, 4:46 AM	<input checked="" type="checkbox"/>	0		

Description

Instantly convert Salesforce page views and components into downloadable PDFs for easy sharing and documentation.

2.3 Initial Setup

Note that, this is a **mandatory step**, if not completed, branding changes will not display, even if you have applied the component and related colors on a object record page.

- Navigate to Setup > Custom Settings > Byob Elements.
- Click Manage > Default Organization Level Value > New.
- Add the following values:
 - **windowViewMode-normal** in the PSC_normalViewElement field.
 - **windowViewMode-maximized** in the PSC_consoleViewElement field.
- Save your settings.

Search Setup

SETUP

Custom Settings

Byob Elements Edit

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

Help for this Page

Edit Byob Elements

Save Cancel

Byob Elements Information

Location: CodeyLabs

PSC_consoleViewElement: * Required Information

PSC_normalViewElement:

3. Branding Sets

3.1 Accessing the Branding Sets Component

- Go to any **Salesforce object record page**.

- In the **App Builder**, find the **Branding Sets** component in the **sidebar** under **custom managed components**.
- Drag and drop the component onto the record page **as the last component on a column**.

3.2 Customizing Colors

The color values supports formats HEX, RGB, RGBA.

- **Background Colors:** Set the background color for different elements on the record page
 - **SLDS Header Background Color:** Set the header background color.
 - **SLDS Neutral Base Background Color:** Set the widgets background color.
- **Button Colors:** Customize the colors of buttons on the record page. **Note well**, that buttons colors appears, only when both of below values are set.
 - **SLDS Button Neutral Color:** Font color of button.
 - **SLDS Button Neutral Background Color:** Background color of button.

The screenshot shows a Lead record page in the Salesforce App Builder. The page has a cyan header with a cyan background color. The main content area has a pink background color. A purple sidebar on the right contains buttons with white text. The 'Branding Sets' component on the right is configured with the following values:

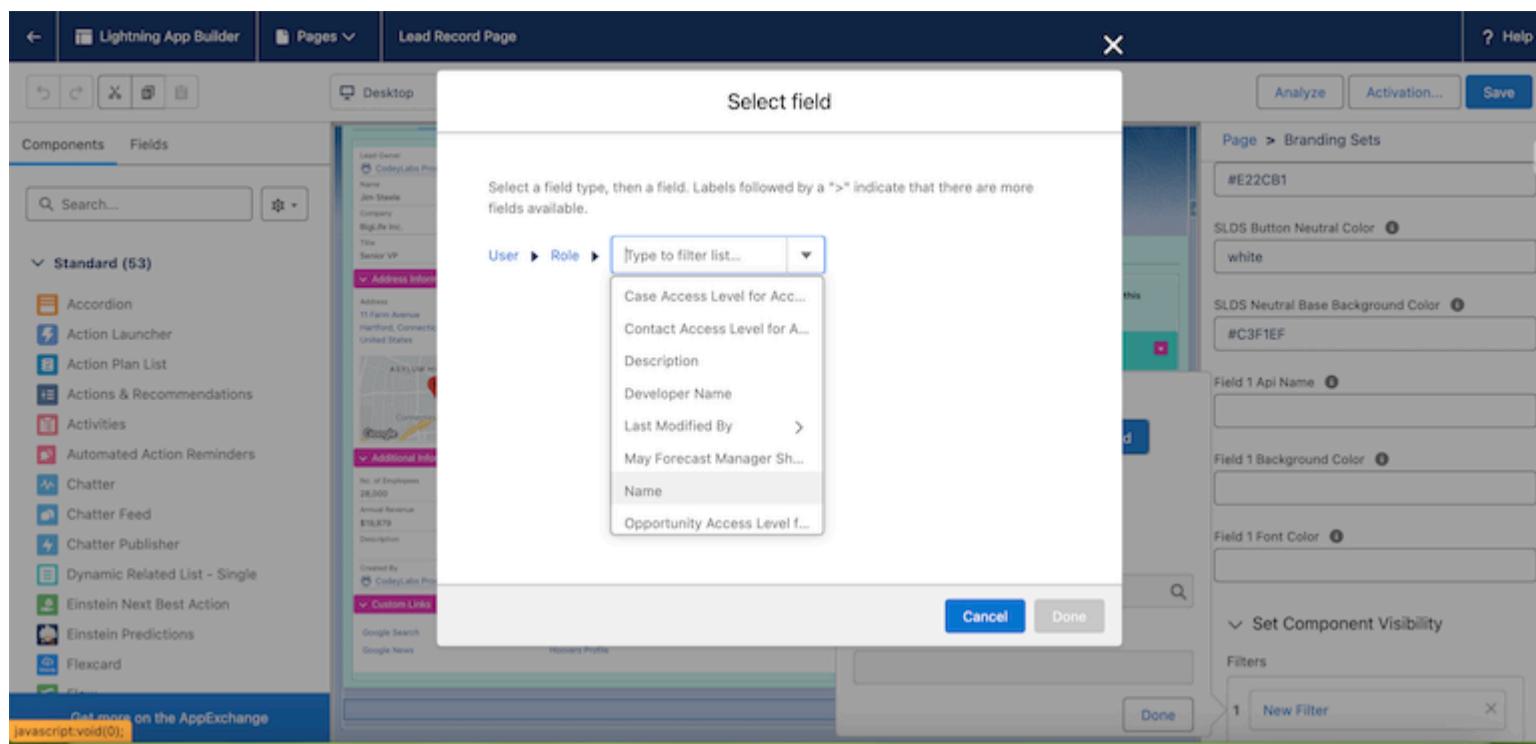
- SLDS Header Background Color: #2BE2D8
- SLDS Button Neutral Background Color: #E22CB1
- SLDS Button Neutral Color: white
- SLDS Neutral Base Background Color: #C3F1EF
- Field 1 Api Name: (empty)
- Field 1 Background Color: (empty)
- Field 1 Font Color: (empty)

3.3 Applying Branding Sets to Record Pages

- After placing the component, **configure the color settings** to match your branding needs.
- **Preview** your changes in the App Builder.
- **Save** your settings to apply them to the record page.

3.4 Role-Based Customization

- **Use role-based customization** to apply specific color schemes depending on the user's role.
- This can be configured through Salesforce's component visibility settings on App Builder.
- Under Set Component Visibility > Add Filter.
- Select **Advanced > User > Role**. And provide your condition of visibility.
- Only matching filter condition users will be able to see the branding.



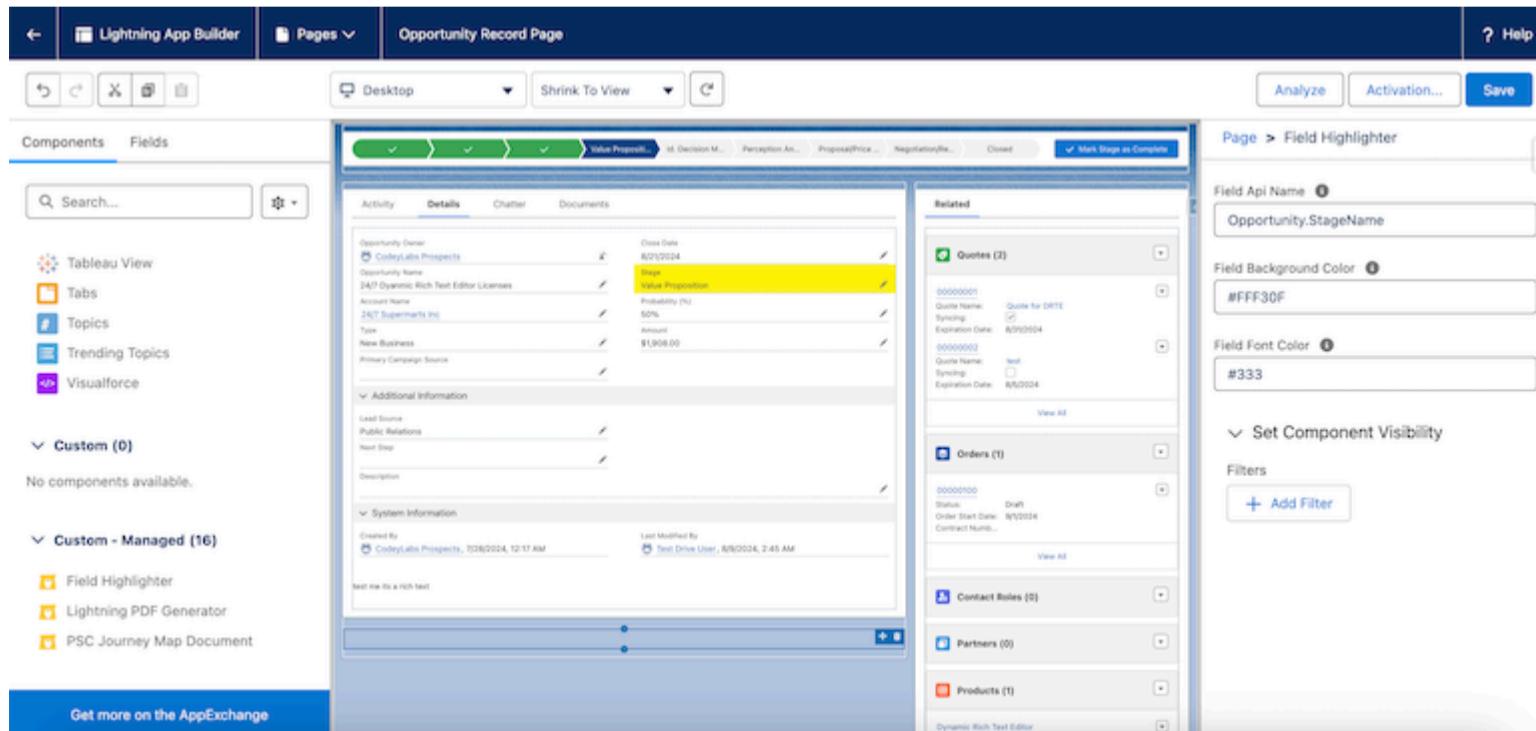
3.5 Use Cases for Branding Sets

- **Corporate Branding:** Align **Salesforce record pages** with your **company's color scheme** for consistent branding.
- **Departmental Customization:** Differentiate record pages for **various departments** like Sales and Service.
- **Event-Specific Branding:** Temporarily change colors for specific **events** or marketing campaigns.
- **Seasonal Themes:** Update pages with **seasonal colors** to reflect marketing strategies or celebrations.
- **Brand-Specific Cases:** Distinguish cases from **multiple brand websites** with **unique color schemes**.

4. Field Highlighter

4.1 Accessing the Field Highlighter Component

- Go to any **Salesforce object record page**.
- In the **App Builder**, find the **Field Highlighter component** in the sidebar under **custom managed components**.
- **Drag and drop** the component onto the record page as the last component on any column so that it doesn't overlap any other component.



4.2 Highlighting Important Fields

- **Field Selection:** Choose the field you want to highlight based on importance or relevance. **Make a note of the Object API Name and the Field API Name from the object manager in Setup.** *If the object and/or field belongs to the different managed package, please ensure to prefix managed package name as defined in the object manager.*
- **Highlight Styles:** Customize the highlight color and style to make the field stand out.

4.3 Conditional Field Highlighting

- **Set up conditions for highlighting fields** based on specific criteria using the Set Component Visibility > Apply Filter.
- For example, **highlight the Lead Score field in red** if the score is below a certain threshold.

4.4 Use Cases for Field Highlighter

- **Critical Data Alerts:** Highlight fields like Lead Score or Opportunity Value to draw immediate attention.
- **Role-Specific Field Emphasis:** Different roles can have different fields highlighted based on what's important for them.
- **Conditional Highlighting:** Automatically highlight fields when certain conditions are met, such as overdue tasks.

5. Advanced Configuration

5.1 Dynamic Event-Themed Colors

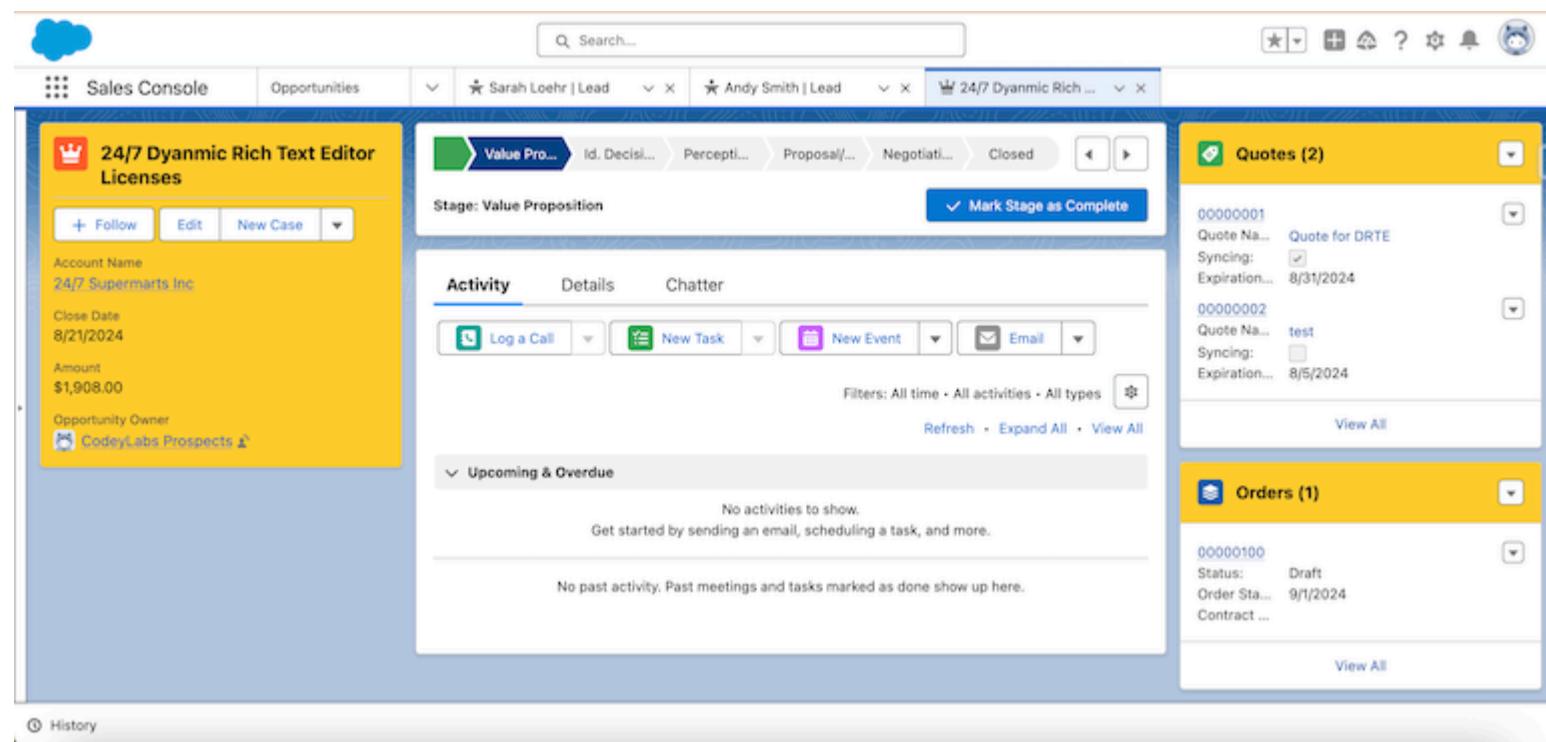
- **Branding Sets:** Configure to dynamically change colors during events or campaigns.
- **Field Highlighter:** Adjust highlight colors based on current promotions or special conditions.

5.2 Accessibility Enhancements

- **High Contrast Options:** Ensure colors and highlights are accessible to all users.
- **Screen Reader Compatibility:** Test settings with screen readers to ensure usability for visually impaired users.

5.3 Console App Compatibility

- **Branding Sets:** Works seamlessly within the Salesforce console app.
- **Field Highlighter:** All highlights and customizations are fully supported in console navigation.



6. New Releases

Version 1.12

- **6.1 Contextual Help**
 - Accessing the Contextual Help Component
 - Configuring the component
 - Use case: A hint to the agent before pushing Merge Cases button.

Version 1.14

- **6.2 Support for Related List Button within Contextual Help Component**

Version 1.15

- **6.3 A new component Field Label Overrider!**

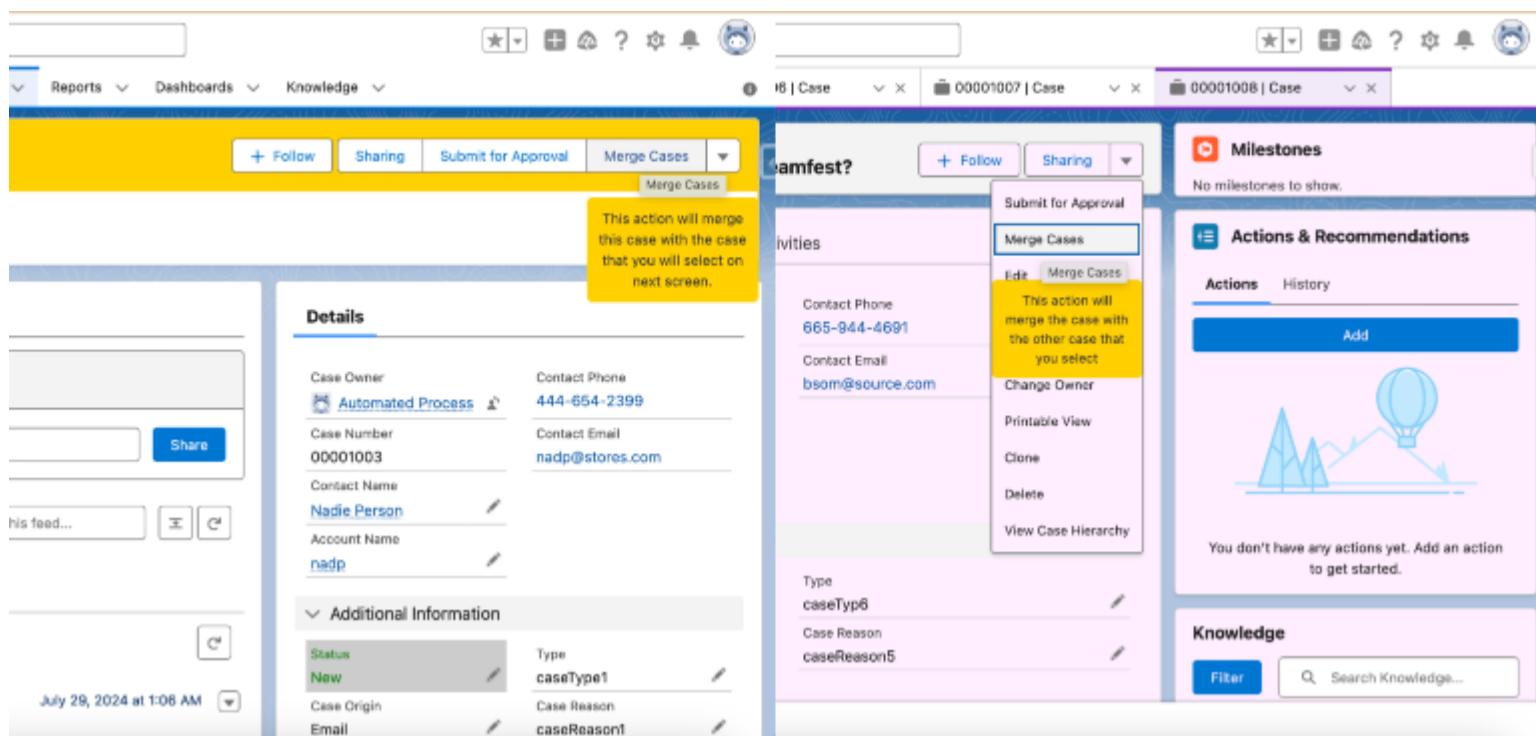
Version 1.16

- **6.4 Introducing *Font Weight Setting* in Field Highlighter Component**

6.1 Contextual Help Component

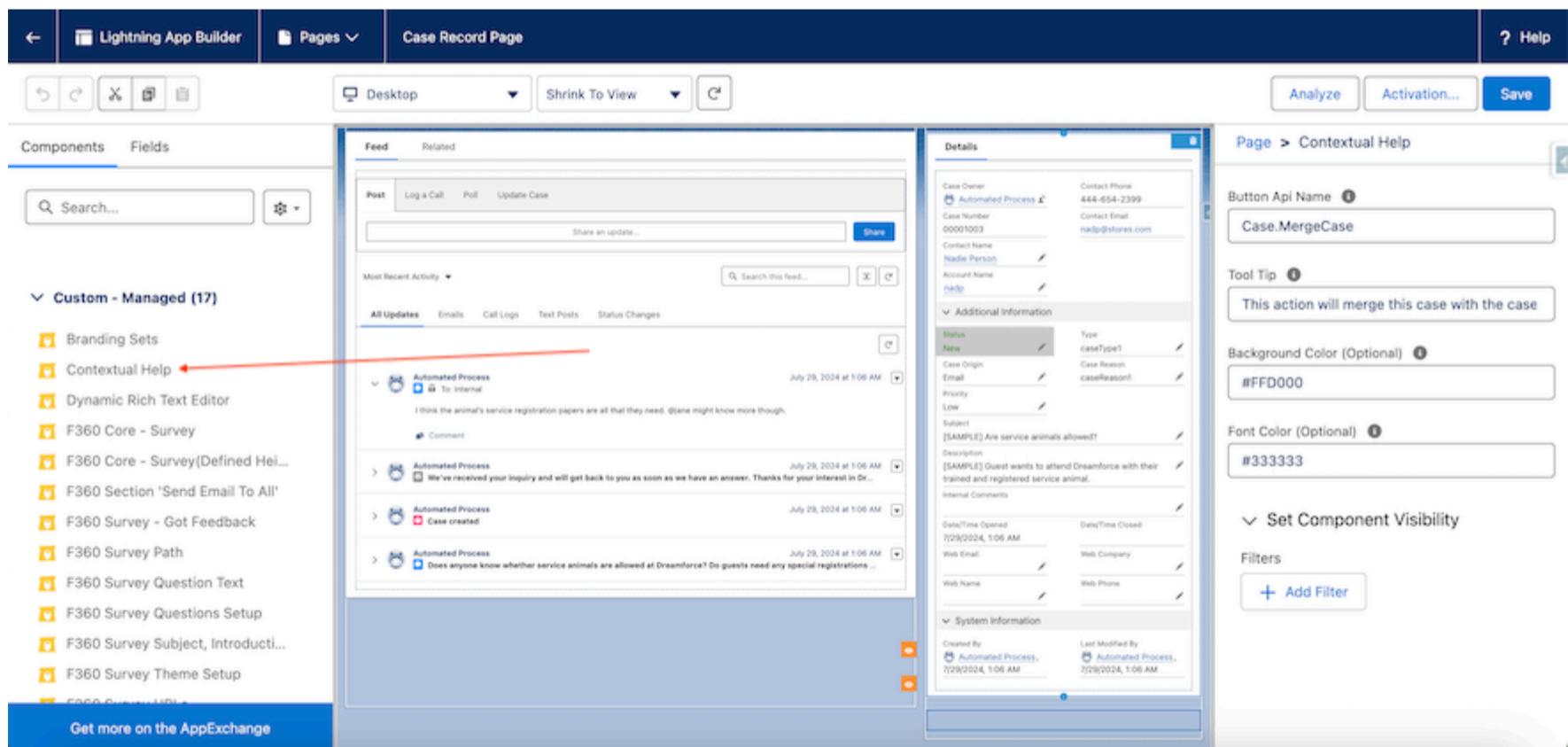
This powerful component is designed to equip users with all the critical information they need directly on the Salesforce record page. Before clicking any header button, users can easily **access contextual guidance through hover tooltips**, ensuring they understand the action they are about to take.

Gone are the days of uncertainty and confusion—this feature delivers clear and concise instructions, reducing the likelihood of errors and enhancing overall user confidence. By providing this upfront information, the **Contextual Help component not only streamlines workflows but also empowers users to work more efficiently and effectively**, making their interactions with Salesforce smoother and more intuitive.



Accessing the Contextual Help Component

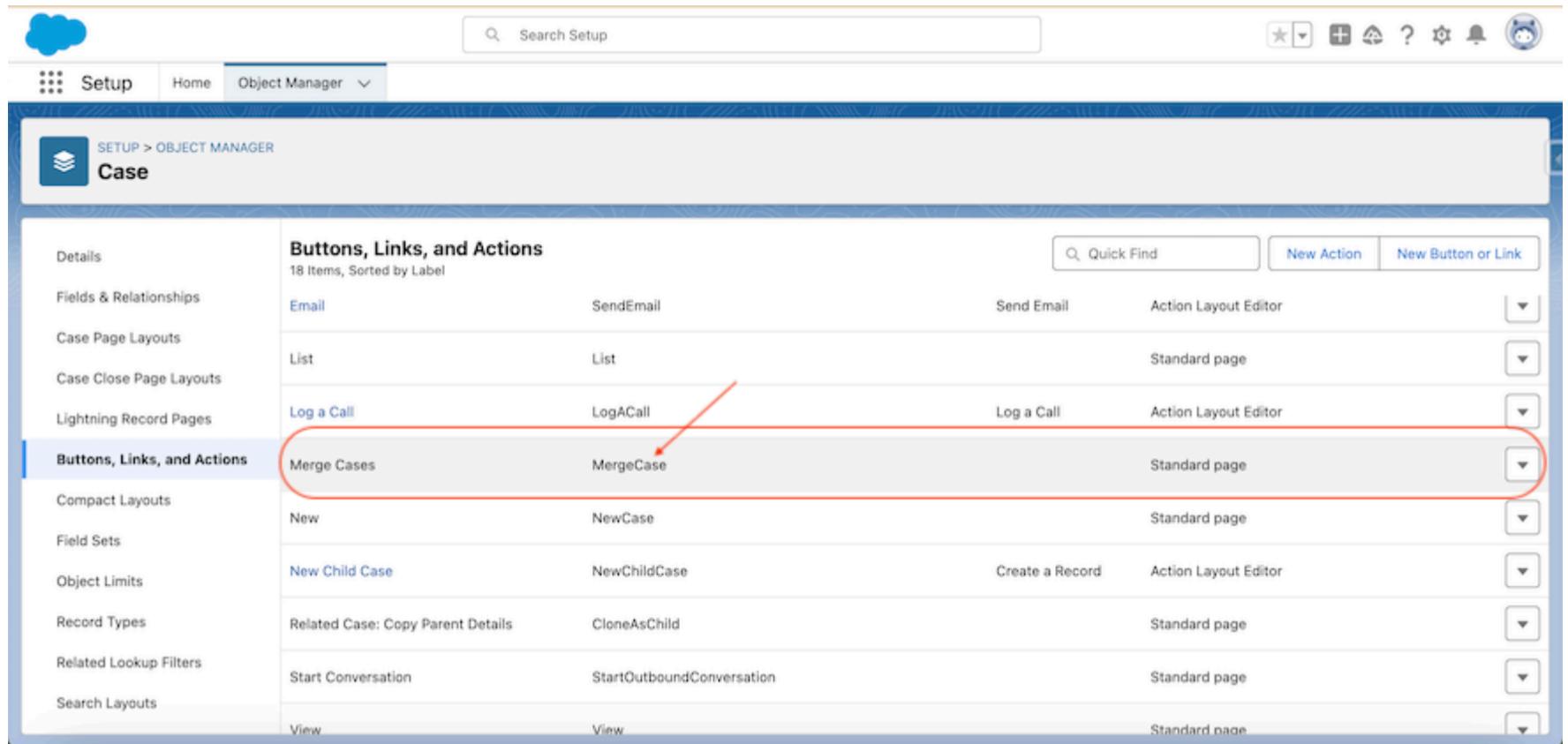
- After Installation of version 1.13, you will notice a new component '**Contextual Help**' in the App Builder, under the custom managed components on the left side bar.
- Simply drag and drop the component onto the page where you'd like the tooltip to appear for a header button.



Configuring the component

- Before we start configuring the component, capture the api name of the displayed button on which you intended to display contextual help tooltip.
 - Go to Object Manager
 - Select the related object.

- Select Button, Links, and Actions in the side bar.
- Find your button and its api name.



Search Setup

Setup Home Object Manager

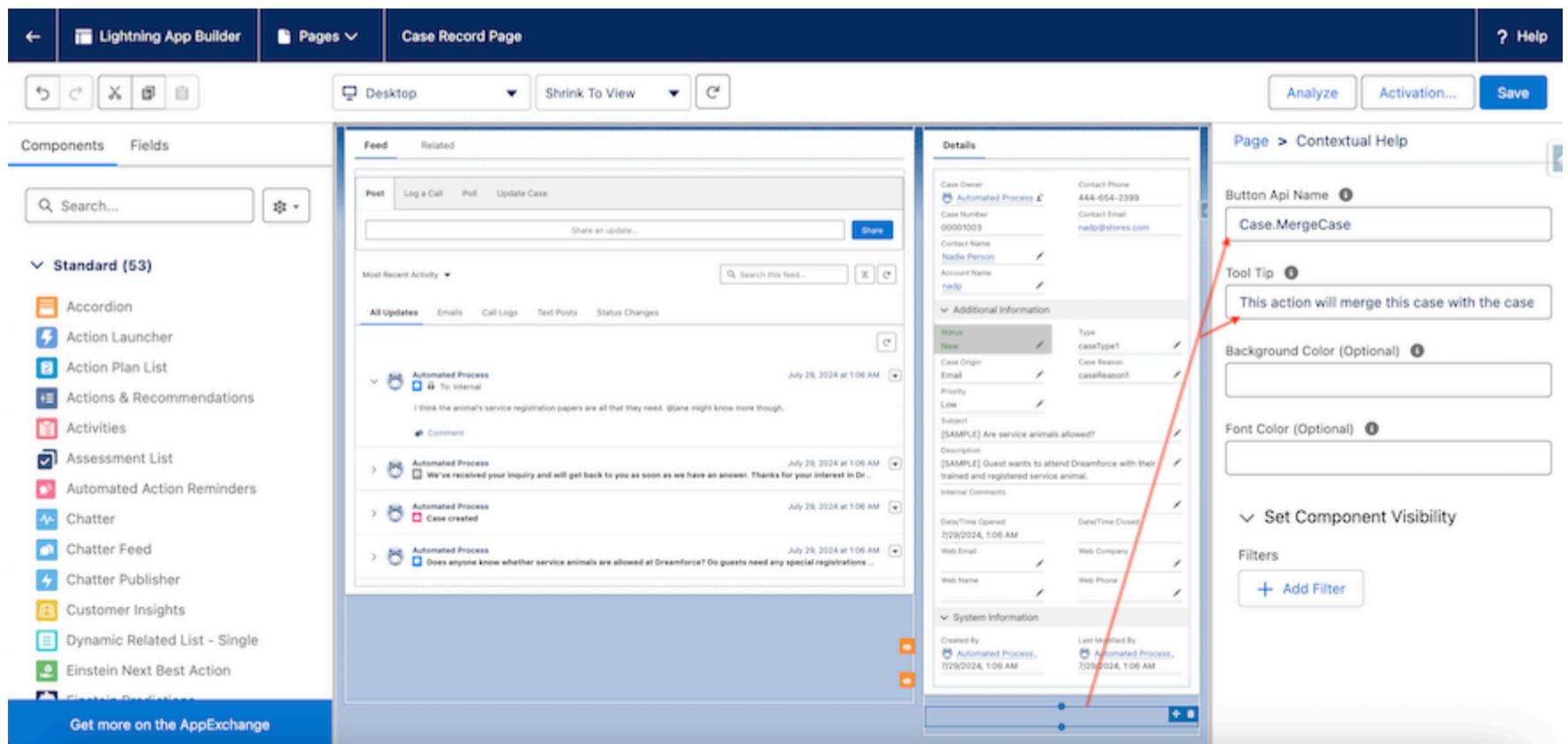
SETUP > OBJECT MANAGER Case

Buttons, Links, and Actions

18 Items, Sorted by Label

Email	SendEmail	Send Email	Action Layout Editor	
List	List		Standard page	
Log a Call	LogACall	Log a Call	Action Layout Editor	
Merge Cases	MergeCase		Standard page	
New	NewCase		Standard page	
New Child Case	NewChildCase	Create a Record	Action Layout Editor	
Related Case: Copy Parent Details	CloneAsChild		Standard page	
Start Conversation	StartOutboundConversation		Standard page	
View	View		Standard page	

- **Provide a value in Button Api Name property.** Button Api Name is a combination of ObjectApiName.ButtonApiName. Make sure you capture the correct api names for object and button; For reference, some of the sample button api names below:
 - Case.MergeCase
 - Lead.Custom_Lead_Conversion
 - Lead.pkg__Custom_Lead_Conversion
 - pkg__Lead.pkg__Custom_Lead_Conversion
- **Tool Tip:** The message that will be displayed on the hover of button.
- **Background Color:** Optional. Set the background color of tool tip message. Supports name, hex, rgb, rgba.
- **Font Color:** Optional. Set the font color of text in tool tip message. Supports name, hex, rgb, rgba.



Lightning App Builder Pages Case Record Page

Components Fields

Standard (53)

Feed Related

Details

Page > Contextual Help

Button Api Name: Case.MergeCase

Tool Tip: This action will merge this case with the case

Background Color (Optional)

Font Color (Optional)

Set Component Visibility

Filters

Use case: A hint to the agent, before pushing Merge Cases button.

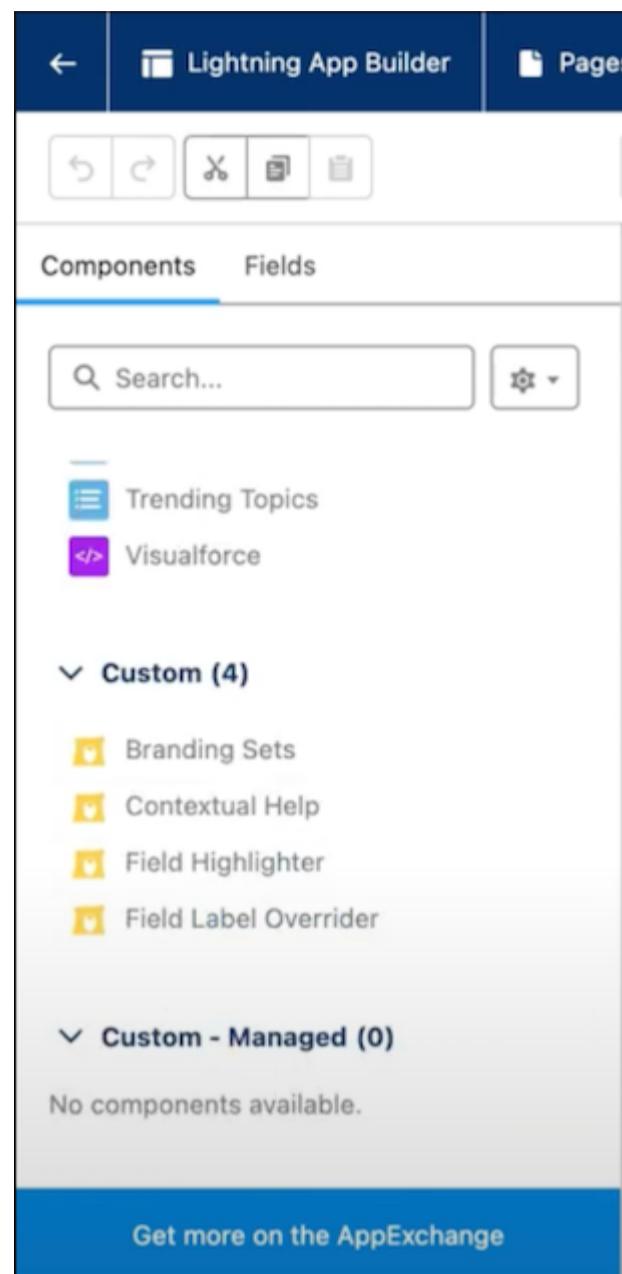
The screenshot shows a Salesforce Case detail page for a case titled "[SAMPLE] Are service animals allowed?". The page includes a 'Feed' section with options like 'Post', 'Log a Call', 'Poll', and 'Update Case'. A 'Details' section shows fields for Case Owner (Automated Process), Case Number (00001003), Contact Name (Nadie Person), and Account Name (nadp). A contextual help component is displayed over the 'Merge Cases' button, stating: "This action will merge this case with the case that you will select on next screen. This action will merge this case with the case that you will select on next screen. This action will merge this case with the case that you will select on next screen." The help component has a dark background with white text and a close button.

6.2 Support for Related List Button within Contextual Help Component

The screenshot shows a Salesforce package detail page for 'Build Your Own Branding'. It includes sections for 'Package Documentations', 'Journey Maps', and 'WM Products'. A contextual help component is displayed over a 'New' button in the 'Package Documentations' section, stating: "Create the product FAQs, Architecture documents". The help component has a dark background with white text and a close button.

6.3 Field Label Overrider

- Find a new Field Label Overrider component in the App Builder.



- Just Drag and Drop the Field Label Overrider as the last component on the page.

The screenshot shows the Lightning App Builder interface with the following components:

- Components** tab selected.
- Search bar** for components.
- Trending Topics** and **Visualforce** sections.
- Custom (4)** section expanded, showing:
 - Branding Sets
 - Contextual Help
 - Field Highlighter
 - Field Label OverriderA red arrow points from this section towards the right-hand Opportunity Record Page.
- Custom - Managed (0)** section.
- No components available.** message.
- Opportunity Record Page** (GenePoint Lab Generators):
 - Activity** and **Details** tabs.
 - Activity** tab shows: Opportunity Owner (Rahul Jain), Type (Private), Opportunity Name (GenePoint Lab Generators), Lead Source (GenePoint), and Order Number.
 - Details** tab shows: Amount (\$20,000.00), Expected Revenue (\$12,000.00), Close Date (4/14/2022), Next Step (Not Started), Stage (Id. Decision Makers), Probability (%), Primary Campaign Source, Main Competitor(s) (Hawkpower), Current Generator(s) (Hawkpower, Fujitsu), Delivery/Installation Status (Yet to begin), and Tracking Number.
 - Created By (Rahul Jain, 5/5/2024, 12:09 AM) and Last Modified By (Rahul Jain, 11/27/2024, 12:30 AM).
 - Description and Delivery Status fields.
- Get more on the AppExchange** button.

- Define the Field Api Name and the Label to Override

The screenshot shows the Salesforce Opportunity page and the 'Field Label Overrider' configuration page side-by-side.

Opportunity Page (Left):

- Stage: Id. Decision Makers
- Activity Details
- Opportunity Owner: Rahul Jain (Amount: \$20,000.00)
- Private (Expected Revenue: \$12,000.00)
- Opportunity Name: GenePoint Lab Generators (Close Date: 4/14/2022)
- Account Name: GenePoint (Next Step:)
- Type: (Primary Campaign Source:)
- Lead Source: (Main Competitor(s): Hawkpower)
- Order Number: (Delivery/Installation Status: Yet to begin)
- Created By: Rahul Jain, 5/5/2024, 12:09 AM
- Last Modified By: Rahul Jain, 11/27/2024, 12:30 AM
- How would you like to describe this opportunity (please use this for each stage description of opportunity)?
- Delivery Status:

Field Label Overrider Page (Right):

- Page > Field Label Overrider
- Field Api Name: Opportunity.Description
- Override Field Label: How would you like to describe this opportunity
- Set Component Visibility
- Filters
- Add Filter

A red arrow points from the 'Description' field on the Opportunity page to the 'Field Api Name' input field on the configuration page.

6.4 Introducing **Font Weight Setting** in Field Highlighter Component

- Just Drag and Drop the field highlighter component.
- Define the Field Api Name (of course prefixed with dot and Object Api Name)
- And select the field font weight from the dropdown to apply.

Activity Chatter

Filters: All time • All activities • All types

Upcoming & Overdue

November • 2024 This Month

Survey Invitations (2)

Field Api Name: Contact.ReportsTold

Field Background Color:

Field Font Color:

Field Font Weight: bold

Set Component Visibility

Add Filter

6.5 Introducing a new Component in Field Highlighter By Date Component

This feature helps you automatically filter records based on their date fields—no need to manually enter dates! Simply select a condition like “Last 7 Days” or “This Week,” and the system will check if the record’s date falls within the specified range.

It's fast, efficient, and ensures you always find the right records at the right time!

Important Requirements

- The target field **must be a Date field**—DateTime fields are **not** supported.
- When specifying the field, **don't include the object name**. Example: Use **CloseDate**, not **Opportunity.CloseDate**.
- The date field **must be on the current record layout**. If it's missing, the component won't retrieve its value.

How Each Date Condition Works

- **YESTERDAY** – Matches records dated exactly **one day before today**.
 - Example: If today is **March 12, 2025**, only records from **March 11, 2025** will match.
- **TODAY** – Matches records where the date is **exactly today**.
 - Example: If today is **March 12, 2025**, only records from **March 12, 2025** will match.
- **TOMORROW** – Matches records dated **one day after today**.
 - Example: If today is **March 12, 2025**, only records from **March 13, 2025** will match.
- **LAST_N_DAYS:n** – Matches records within the **last N days, including today**.
 - Example: If today is **March 12, 2025**, and **n=6**, records from **March 6, 2025, to March 12, 2025** will match.
- **NEXT_N_DAYS:n** – Matches records in the **next N days, including today**.
 - Example: If today is **March 12, 2025**, and **n=6**, records from **March 12, 2025, to March 18, 2025** will match.
- **LAST_WEEK** – Matches records from the **previous full week (Sunday to Saturday)**.
 - Example: If today is **March 12, 2025**, the last full week was **March 2–March 8, 2025**. Records in that range will match.
- **THIS_WEEK** – Matches records from the **current full week (Sunday to Saturday)**.
 - Example: If today is **March 12, 2025**, this week is **March 9–March 15, 2025**.
- **NEXT_WEEK** – Matches records from the **next full week (Sunday to Saturday)**.
 - Example: If today is **March 12, 2025**, the next full week is **March 16–March 22, 2025**.

Opportunity Record Page

Components Fields

Search...

Report Chart, Rich Text, runtime_Industries_scoringfram..., Tableau Pulse, Tableau View, Tabs, Topics, Trending Topics, Visualforce, Custom (5), Custom - Managed (0), No components available.

Get more on the AppExchange

Opportunity Record Page

Opportunity Owner: Rahul Jain (Private), Opportunity Name: Dickenson Mobile Generators, Account Name: Dickenson plc, Type: New Customer, Lead Source: Purchased List, Order Number, Current Generator(s), Tracking Number, Created By: Rahul Jain, 5/5/2024, 12:09 AM, Last Modified By: Rahul Jain, 12/3/2025, 3:10 AM

Amount: \$15,000.00, Expected Revenue: \$1,500.00, Close Date: 13/3/2025, Next Step: Qualification, Stage: Qualification, Probability (%): 10%, Primary Campaign Source, Main Competitor(s): Honda, Delivery/Installation Status, Description, Delivery Status

Notes & Attachments (0)

Upload Files, Or drop files

Contact Roles (0), Partners (0), Stage History (3+)

Stage: Qualification, Amount: \$15,000.00, Probability: 10%, Expected R...: \$1,500.00, Close Date: 13/3/2025, Last Modifi...: Rahul Jain, 12/3/2025, 3:10 AM

Stage: Qualification, Amount: \$15,000.00, Probability: 10%, Expected R...: \$1,500.00, Close Date: 11/3/2025, Last Modifi...: Rahul Jain, 12/3/2025, 3:10 AM

Stage: Qualification, Amount: \$15,000.00, Probability: 10%, Expected R...: \$1,500.00, Close Date: 12/3/2025, Last Modifi...: Rahul Jain, 12/3/2025, 3:10 AM

View All, + Add Filter

Page > Field I

Field API Name: Opportunity.CloseDate

Field Background:

Field Font Color: red

Field Font Weight:

Date Field API Name: CloseDate

Comparison Operator: Equals

Date Condition Value: NEXT_N_DAYS

Value of n: 5

Set Comparison Operator:

Filters:

Real-World Examples

Example 1: Finding records from the Last 6 Days

- **Today's date:** March 12, 2025
- **Record's date:** March 10, 2025
- **Selected condition:** LAST_N_DAYS:6
- **Match!** The record falls within the last 6 days.

Example 2: Checking if a record is in Last Week

- **Today's date:** March 12, 2025
- **Record's date:** March 5, 2025
- **Selected condition:** LAST_WEEK
- **No Match!** Last week was **March 2–March 8**, and March 5 is outside that range.

Example 3: Looking ahead 6 days

- **Today's date:** March 12, 2025
- **Record's date:** March 15, 2025
- **Selected condition:** NEXT_N_DAYS:6
- **Match!** The record is within the next 6 days.

Example 4: Finding records for Next Week

- **Today's date:** March 12, 2025
- **Record's date:** March 17, 2025
- **Selected condition:** NEXT_WEEK
- **Match!** Next week starts on March 16, and March 17 falls in that range.

Example 5: Record too far in the past

- **Today's date:** March 12, 2025
- **Record's date:** March 5, 2025
- **Selected condition:** LAST_N_DAYS:3
- **No Match!** March 5 is more than 3 days ago.

Analyze
Activation...

Or drop files

Contact Roles (0)

Partners (0)

Stage History (3+)

Stage:	Qualification
Amount:	\$15,000.00
Probability ...	10%
Expected R...	\$1,500.00
Close Date:	13/3/2025
Last Modifi...	Rahul Jain
Last Modifi...	12/3/2025, 3:10 AM

Stage:	Qualification
Amount:	\$15,000.00
Probability ...	10%
Expected R...	\$1,500.00
Close Date:	11/3/2025
Last Modifi...	Rahul Jain
Last Modifi...	12/3/2025, 3:10 AM

Stage:	Qualification
Amount:	\$15,000.00
Probability ...	10%
Expected R...	\$1,500.00
Close Date:	12/3/2025
Last Modifi...	Rahul Jain
Last Modifi...	12/3/2025, 3:10 AM

[View All](#)

Page > Field Highlighter (By Da

Field API Name

Field Background Color

Field Font Color

Field Font Weight

Date Field API Name for Filtering

Comparison Operator for Date Field

Date Condition Value

Value of n

▼ Set Component Visibility

Filters [+ Add Filter](#)

This feature **saves time and effort** by dynamically filtering records based on real-time dates. Whether you need to find records from last week, the next 7 days, or just today, the system does the work for you. **No manual date entry required!**

7. Troubleshooting & FAQs

7.1 Common Issues and Solutions

- **Color Persistence Issue:** Ensure that changes are saved properly in the App Builder.
- **Field Highlighting Not Visible:** Double-check that the conditions for highlighting are met.

7.2 Frequently Asked Questions

What is Build Your Own Branding?

Build Your Own Branding is a Salesforce managed package that includes Branding Sets and Field Highlighter, allowing users to customize record page appearances and highlight important fields.

How do I apply a color scheme to a record page?

Use the Branding Sets component in the App Builder to customize colors for your record pages.

Can I use Build Your Own Branding in the Salesforce console app?

Yes, both Branding Sets and Field Highlighter are fully compatible with the Salesforce console app.

What are some common use cases for these components?

Common use cases include corporate branding, departmental customization, event-specific branding, and highlighting critical fields for better visibility.

8. Support & Resources

8.1 Contacting Support

For any issues or questions, contact our support at **info@codeylabs.com!**

8.2 Additional Resources

- User Guide: [Link to User Guide](#)
- Video Tutorials: [Link to Tutorials](#)

About CodeyLabs

CodeyLabs is a pioneer brand dedicated to enhancing the Salesforce ecosystem through innovative and customizable solutions. Our mission is to empower businesses by transforming their Salesforce experience, ensuring it aligns perfectly with their brand and operational needs. We specialize in delivering tailored solutions that optimize user interaction and streamline workflows. Committed to innovation and customer satisfaction, CodeyLabs delivers exceptional value, enhances productivity, and fosters a seamless user experience. Join us on the journey to revolutionize your Salesforce platform and unlock its full potential.

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