

URL SHORTENER APP

Shortens the Salesforce record URL

USER MANUAL

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URLShortener app

Overview

URLshortener is a Salesforce Application that integrates Salesforce with Bit.ly. Bitly provides the facility to shorten and optimize web links. This app will allow user to automatically create short URLs with the help of Bitly API for the Salesforce record URL with simple navigation clicks.

The app creates Bitly URLs for the salesforce record URL for Classic and standard objects.

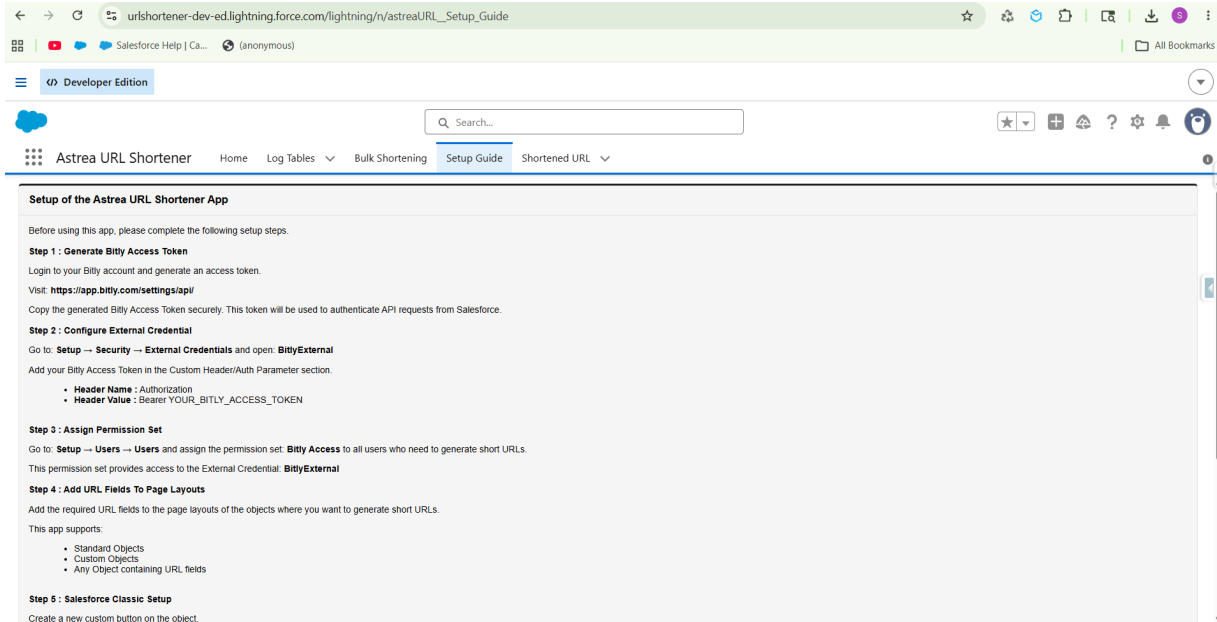
The app can be used to generate the URL manually or automatically.

Key Features:

- Creates bitly short URL for Salesforce's Standard and Custom Objects records URL
- Works on Standard and custom objects.
- Shorten URL can be generated either manually or in bulk automatically.
- For bulk generation of short URLs there is a facility of batch jobs. User can instantly run these batch jobs with the help of VF page for this standard objects.
 - ◆ Account
 - ◆ Contact
 - ◆ Case
 - ◆ Lead
 - ◆ Opportunity

URLshortener set up guide page

This is the initial landing page of the app. This will guide users for all the configurations/setups necessary to use this app.



The screenshot shows a web browser displaying the 'Setup Guide' page for the 'Astrea URL Shortener' app. The browser's address bar shows the URL: `urlshortener-dev-ed.lightning.force.com/lightning/n/astreaURL_Setup_Guide`. The page has a navigation bar with the following items: Home, Log Tables, Bulk Shortening, Setup Guide (active), and Shortened URL. The main content area is titled 'Setup of the Astrea URL Shortener App' and contains the following instructions:

Before using this app, please complete the following setup steps.

Step 1 : Generate Bitly Access Token
Login to your Bitly account and generate an access token.
Visit: <https://app.bitly.com/settings/api/>
Copy the generated Bitly Access Token securely. This token will be used to authenticate API requests from Salesforce.

Step 2 : Configure External Credential
Go to: **Setup** → **Security** → **External Credentials** and open: **BitlyExternal**
Add your Bitly Access Token in the Custom Header/Auth Parameter section.

- Header Name : Authorization
- Header Value : Bearer YOUR_BITLY_ACCESS_TOKEN

Step 3 : Assign Permission Set
Go to: **Setup** → **Users** → **Users** and assign the permission set: **Bitly Access** to all users who need to generate short URLs.
This permission set provides access to the External Credential: **BitlyExternal**

Step 4 : Add URL Fields To Page Layouts
Add the required URL fields to the page layouts of the objects where you want to generate short URLs.
This app supports:

- Standard Objects
- Custom Objects
- Any Object containing URL fields

Step 5 : Salesforce Classic Setup
Create a new custom button on the object.

Configuration & Admin Settings:

Since Bitly Integration is done in this app, user needs to add edit named credentials. In case user does not have a Bitly account, then he needs to first create a Bitly account to use this app.

NOTE: Please create a Bitly account and go to permission sets and search for Bitly Permission and assign that permission set to user.

1. Go to BitlyExternal

Named Credentials External Credentials External Auth Identity Providers

1 Items - Sorted by Label

New

Label	Authentication Protocol	Actions
BitlyExternal	Custom	

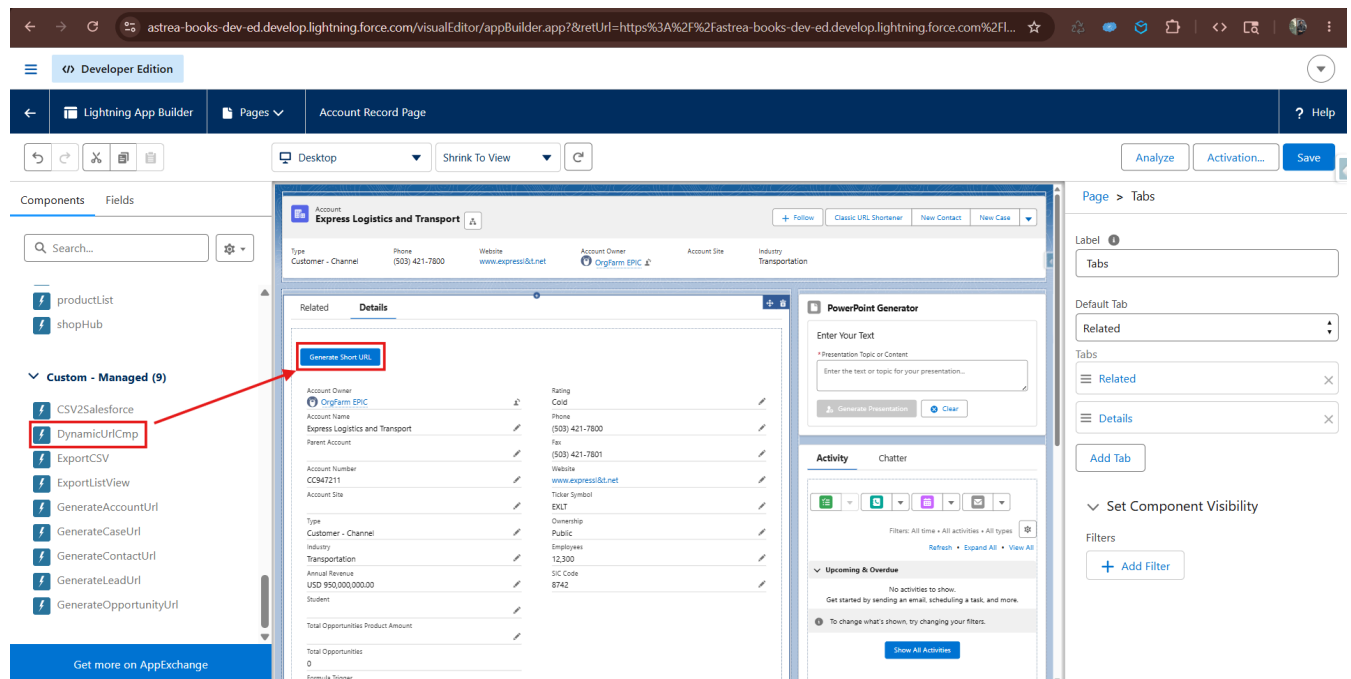
2. Click on Custom header and after Bearer paste your access token from Bitly.

Custom Headers				New
Sequ...	Name	Value	Actions	
1	Authorization	Bearer 7dd85ecbc7aba8b8e917cdf9ed9f2b1bf5786d7	▼	

Functionality:

Steps To Generate Bitly URL(Lightning):

1. Go to object in which you want to add URL shortener.
2. Select any record, click on gear icon and select **Edit Page**.
3. Add the Custom Component **DynamicUrlCmp** to the respective detail page :



4. Now go to any record you want the URL to shorten and click on Generate Short Url.
5. Then reload the page and your all URLs are shortens.

astrea-books-dev-ed.develop.lightning.force.com/lightning/r/Account/001gK00000KujezQAB/view

Developer Edition

Search...

Sales Home Reviews Students Opportunities Flows Leads Tasks Files Accounts Contacts

Account **United Oil & Gas Corp.**

Type: Customer - Direct Phone: (212) 842-5500 Website: <https://bit.ly/4dbi8mr> Account Owner: OrgFarm EPIC Account Site: Industry: Energy

Related **Details**

Generate Short URL

Account Owner	OrgFarm EPIC	Rating	Hot
Account Name	United Oil & Gas Corp.	Phone	(212) 842-5500
Parent Account		Fax	(212) 842-5501
Account Number	CD355118	Website	https://bit.ly/4dbi8mr
Account Site		Ticker Symbol	UOS

To Do List

Steps To Generate Bitly URL(For Classic):

1. Go to object in which you want to add URL shortener.
2. Select any record, click on gear icon and select **Edit Object**.
3. Go to Button, Links and Actions and click on new Button or Link.
4. Write any label you want, in display type choose : **Detail Page Button**, in Behaviour choose : Display in existing window without sidebar. content source-URL
5. Paste : /apex/astreaURL__GenericeButton?id={![Account.Id](#)}

Note : Instead of Account replace the object api name you are using Shortener for.

SETUP > OBJECT MANAGER

Account

Details

Fields & Relationships

Data Cloud Related List

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Slack Record Layouts

Edit Account Custom Button or Link

Classic URL Shortener

Custom Button or Link Edit Save Quick Save Preview Cancel

Label: Classic URL Shortener

Name: Classic_URL_Shortener ⓘ

Description:

Display Type:
 ☐ Detail Page Link View example
 ☒ Detail Page Button View example
 ☐ List Button View example

Behavior: Display in existing window without sidebar View Behavior Options

Content Source: URL

Select Field Type: Account Insert Field: -- Insert Merge Field -- Insert Operator:

/apex/astreaURL_GenexiceButton?id={!Account.Id}

Functions: -- All Function Categories --

ABS
ACOS
ADDMONTHS
AGE
AGEON
AND

Insert Selected Function

6. Now save it and go to page layout and drag the button from Mobile & Lightning Action to Salesforce Mobile and Lightning Experience Actions.

SETUP > OBJECT MANAGER

Account

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Buttons, Links, and Actions

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Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Slack Record Layouts

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Mobile Action Name

Add Contacts To C...	Change Owner	Create Credit Memo	Disable Partner A...	Email (mobile only)	Generate Invoices	Include Offline	Mobile Smart Actions	New Contact	New Note
Add to an Action...	Change Record Type	Create Incident	Edit	Enable As Partner	Get Contacts	Link	New Account	New Event	New Opportunity
Add to Call List	Check for New Data	Delete	Edit Labels	Evaluate Candidate	Get Survey Invita...	Link a Slack Channel	New Case	New Group	New Partner Channel
Call	Classic URL Short...	Disable Customer ...	Email	File	Guest Community Case	Log a Call	New Community Case	New Lead	New Task

Highlights Panel

Customize the highlights panel for this page layout.

Quick Actions in the Salesforce Classic Publisher

Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event Link Poll Question Email

Salesforce Mobile and Lightning Experience Actions

Classic URL Shortener Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event Link Poll Question

Email Change Owner Include Offline Check for New Data Submit for Approval Get Contacts Edit Delete Change Record Type Sharing View Account Hierarchy

Call Send Text Email (mobile only) View Website

Account Detail

Standard Buttons: Edit Change Owner Change Record Type Send Survey Delete View Account Hierarchy Sharing Sharing Hierarchy Include Offline Enable As Partner Disable Customer Account Disable Partner Account Get Survey Invitation Check for New

Custom Buttons:

7. Save it and go to record page and reload it.

8. Now click on button you have created and reload the page.

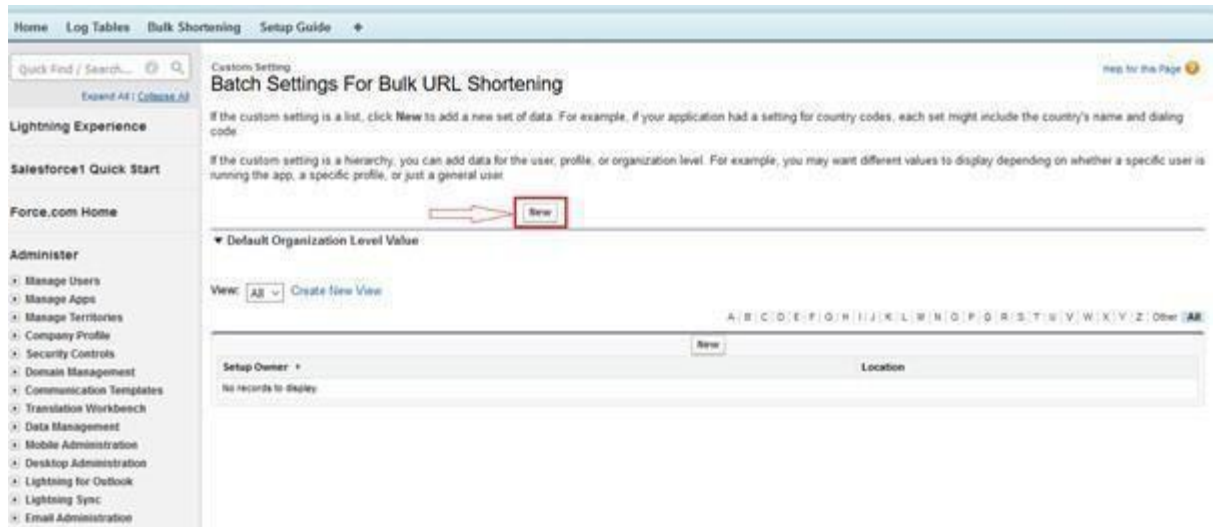
The screenshot shows the Salesforce Developer Edition interface for the 'University of Arizona' account. The account details section includes fields for Type (Customer - Direct), Phone ((520) 773-9050), Website (https://bit.ly/4elAc8G), Account Owner (OrgFarm EPIC), Account Site, and Industry (Education). A 'Classic URL Shortener' button is visible in the top right corner. A red box highlights the 'Website' field, and another red box highlights the 'Classic URL Shortener' button. Red arrows point from these boxes to each other, indicating a link or relationship.

➤ To generate bulk URLs:

1. Visit the Custom Settings page (Setup -> Develop -> Custom Settings)

The screenshot shows the Salesforce Custom Settings page. At the top, there is a green banner indicating that 0% of custom settings data is used. Below this, there is a table with columns: Action, Label, Visibility, Settings Type, Namespace Prefix, Description, Record Size, Number of Records, and Total Size. The table contains one row labeled 'Batch Settings For Bulk URL Shortening'. A red arrow points to the 'Manage' button in the 'Action' column of this row.

2. Click on manage for "Batch Settings For Bulk URL Shortening" and then click on new above Default Organization Level Value.

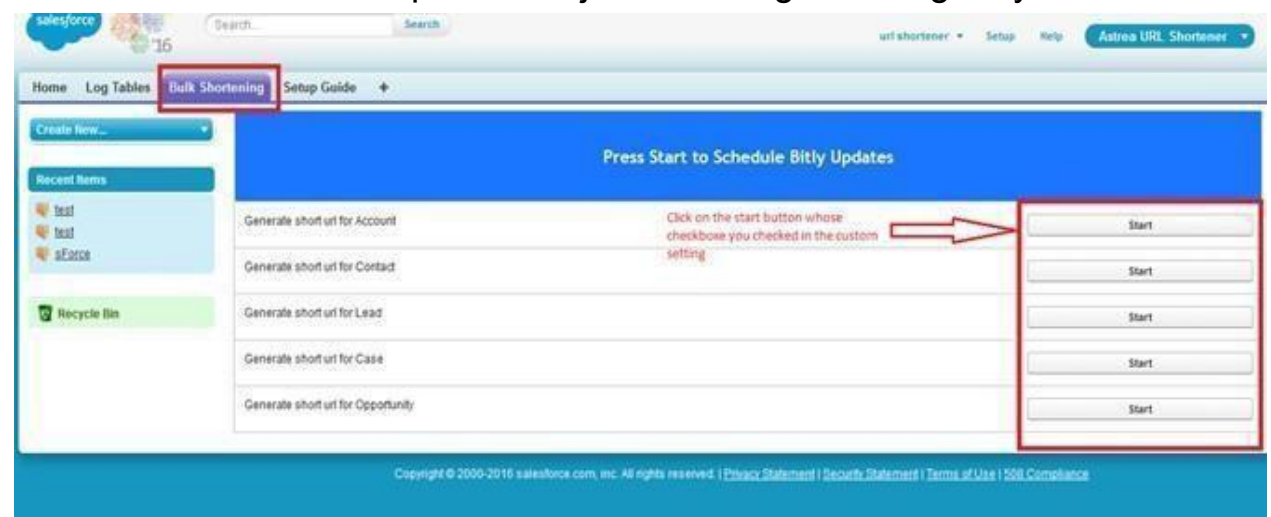


3. Now check the checkboxes whose bulk URL you need to generate.

Batch Settings For Bulk URL Shortening Edit

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

4. Now go to the Bulk Shortening tab of the app and click on the start button of the respective object to start generating Bitly URL.



5. If you want to disable bulk shortening, simply go to the custom settings as in step 1.
6. Click on “manage” for "Batch Settings For Bulk URL Shortening" and then click on edit above “Default Organization Level Value”.
7. Now deselect the checkboxes whose bulk shortening is not needed. From here the bulk shortening can be enabled or disabled.