

SMART BARCODE APP

Generate Barcode in few clicks

USER MANUAL

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Smart Barcode

App Overview:

Smart Barcode is a Salesforce Application. This app is useful to generate the Barcode. This app is used to convert any text to Barcode. Users can use this app for any field in any object.

It supports point and click graphical user interface environments which are very simple and easy to use.

Users can perform operations like “**Generate Barcode**” in “**Code 128**”, “**Code 39**”, “**EAN 13**”, “**EAN 8**”, “**Code 25**”, “**Code 11**”, “**Code 93**” and “**QR Code**”

format for any sObject record in Salesforce.

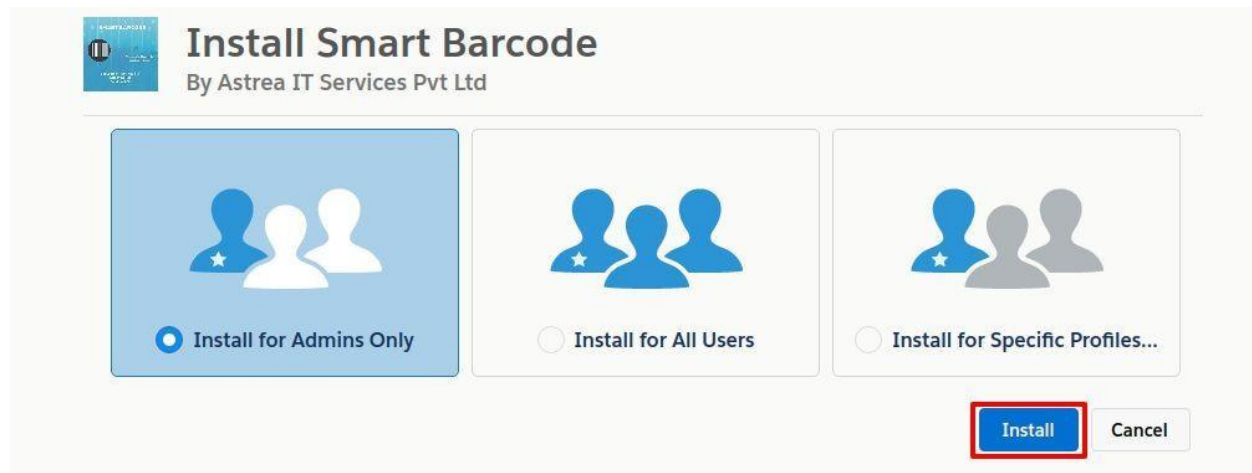
Features :

1. Users can generate Barcode/QR Code for any field and for any object in Salesforce.
2. Also generate Barcode/QR Code for any field and for any object in PDF format.
3. Users can generate a barcode/QR Code for the field and attach it as PDF for that particular sObject.
4. Also generate Barcode/QR Code for any field and for any object and email to the specified email address in form of PDF.
5. In the list view of a sObject record page you can select more than one record at a time and also generate a barcode for all of them at one time.

CONFIGURATIONS SETTINGS

1. END USER Configurations :

First, users need to install the app.



Installation is done when the user will reached to that step.



To confirm that the app is installed properly or not in the user org, users can check in our org by search in Quick Find/Search for “**Installed Packages**” and screen will look like this.

Uninstall	 Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	Free	N/A
Description This package contains Connected Applications for all the officially supported Salesforce client applications su						
Uninstall	 Smart Barcode	Astrea IT Services	1.6	SmartBarcode	Active	Unlimited

2. Remote Site Configuration:

1. Click the Setup (⚙️) icon in the top-right corner.
2. In the Quick Find box, search for Remote Site Settings.
3. Click Remote Site Settings.
4. Click the New Remote Site button.

Fill in the required details:

- Remote Site Name: **QRCode**
- Remote Site URL: **https://api.qrserver.com**
- Disable Protocol Security: Check this box
- Active: Check this box to enable the remote site.

Remote Site Edit

Enter the URL for the remote site. All s-controls, JavaScript OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.

Remote Site Setting Edit Save Save & New Cancel

Remote Site Name

Remote Site URL

Disable Protocol Security ☒ ⓘ

Description

Active ☒

Save Save & New Cancel

5. Click Save.

3. Smart Barcode Configuration:

Users need to create a custom button on subject detail page.

Buttons, Links, and Actions Account Help for this Page ⓘ

Use this page to manage buttons, links, and actions.

Buttons, Links, and Actions New Action **New Button or Link** Default Custom Links Buttons, Links, and Actions Help ⓘ

Action	Label	Name	Description	Type	Content Source	Icon	Overridden
Edit	Accounts Tab	Tab			Standard page		
Edit	Add to Call List	MassCreateCallList			Standard page		

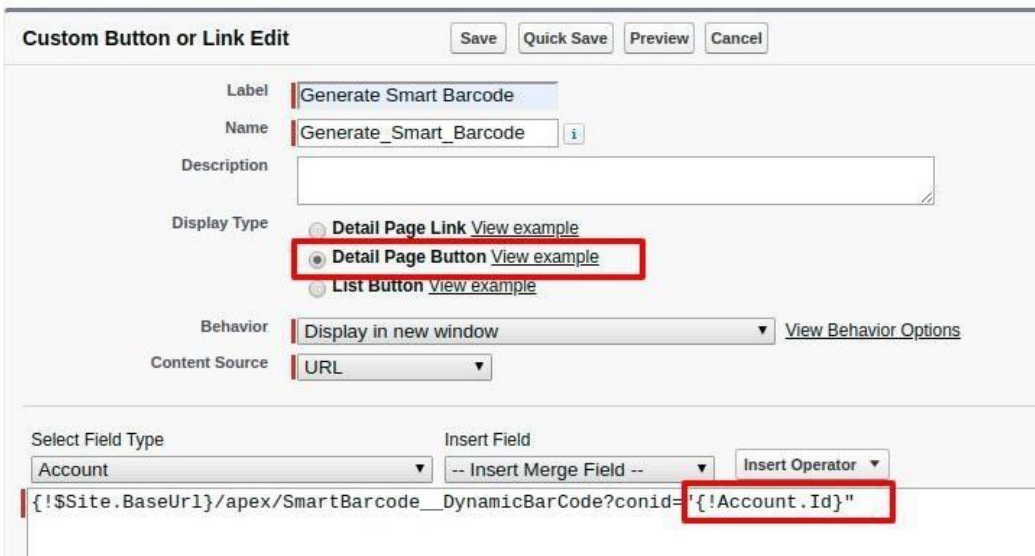
After clicking on that button the user just needs to create a custom detail page button and add on the detail page through subject page layout.

URL which user need to add into the button :

**`{!$Site.BaseUrl}/apex/SmartBarcode__
DynamicBarCode?conid={!ObjectName.Id}`**

The page will look like this.

Account Custom Button or Link
New Button or Link



Custom Button or Link Edit [Save] [Quick Save] [Preview] [Cancel]

Label: Generate Smart Barcode

Name: Generate_Smart_Barcode ⓘ

Description:

Display Type: ☐ Detail Page Link [View example](#)
☒ **Detail Page Button** [View example](#) (highlighted)
☐ List Button [View example](#)

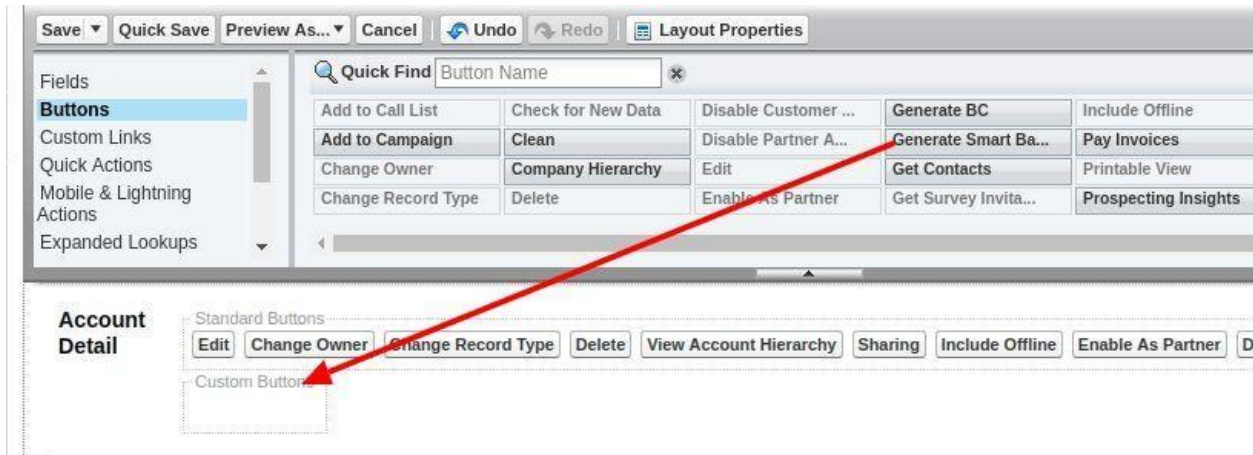
Behavior: Display in new window ▾ [View Behavior Options](#)

Content Source: URL ▾

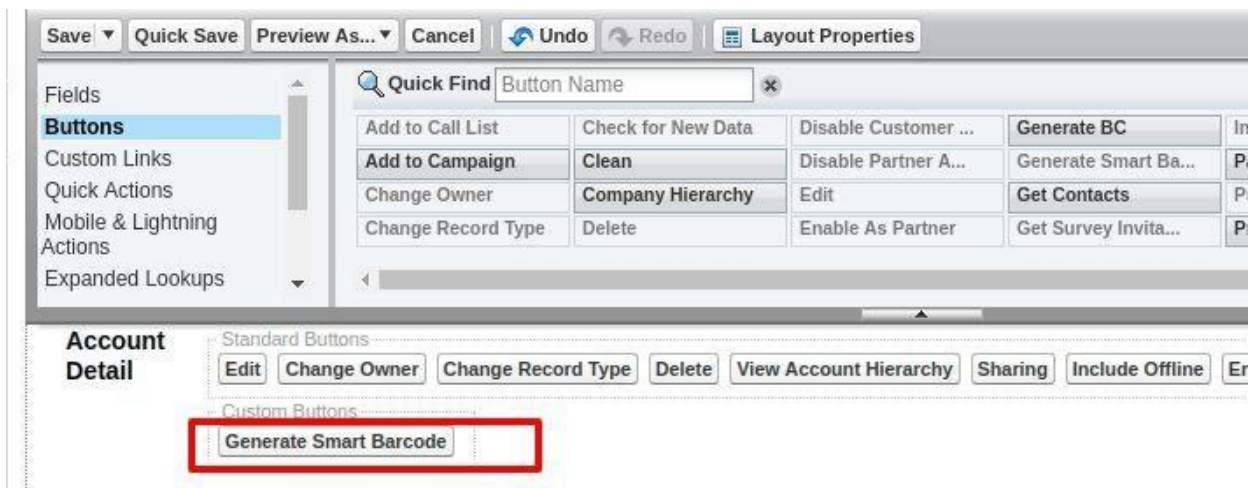
Select Field Type: Account ▾ Insert Field: -- Insert Merge Field -- ▾ Insert Operator: ▾

URL: `{!$Site.BaseUrl}/apex/SmartBarcode__DynamicBarCode?conid=` **`{!Account.Id}`** (highlighted)

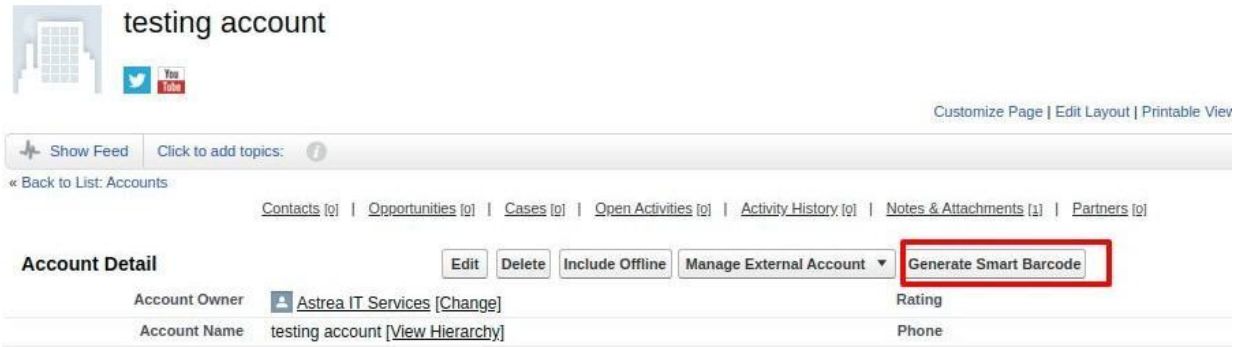
And then go to sObject (in our case **Account**) page layout by clicking “**Edit Layout**” and drag the newly created button name “**Generate Smart Barcode**” to the account detail custom button section. The screen will look like,



And drag that button from the bottom section to the custom buttons sections. And the screen will look like this.



And after clicking on the save button, the button will appear on the sObject detail page.



testing account

Customize Page | Edit Layout | Printable View

Show Feed Click to add topics: ⓘ

« Back to List: Accounts

Contacts [0] | Opportunities [0] | Cases [0] | Open Activities [0] | Activity History [0] | Notes & Attachments [1] | Partners [0]

Account Detail Edit Delete Include Offline Manage External Account Generate Smart Barcode

Account Owner	 Astrea IT Services [Change]	Rating
Account Name	testing account [View Hierarchy]	Phone

Users can also create a button on the subject list view page. After clicking on that button the user just needs to create a custom button on the list view page and add on the list view through **Account Search Layouts> Accounts List View** . And again go through the create custom button and click on the list button.

For adding the button on listview, users just need to create a button for listview and add on the page layout. Script which user need to add into the button :

```
{!REQUIRESRIPT("/soap/ajax/16.0/connection.js")}

var records = {!GETRECORDIDS($ObjectType.ObjectName)};
if(records==""){

    alert('Please Select Atleast One Record.');
```

```
}else{
window.open('/apex/SmartBarcode__DynamicBarCode?conid='+records );
}
```

Account Custom Button or Link New Button or Link

Custom Button or Link Edit Save Quick Save Preview Cancel

Label:

Name: [i](#)

Description:

Display Type:

- ☐ Detail Page Link [View example](#)
- ☐ Detail Page Button [View example](#)
- ☒ List Button [View example](#)

☒ Display Checkboxes (for Multi-Record Selection)

Behavior: [View Behavior Options](#)

Content Source:

JavaScript custom buttons may reduce application security and block compatibility with Lightning. See [Lightning Alternatives to JavaScript Buttons](#).

Select Field Type: Insert Field: Insert Operator:

```
{!REQUIRESSCRIPT("/soap/ajax/16.0/connection.js")}  
var records = {!GETRECORDIDS($ObjectType, Account)};  
if(records==''){  
  alert('Please Select Atleast One Record.');}  
else{ window.open('/apex/SmartBarcode__DynamicBarCode?conid='+records );  
}
```

And after that click on the **Account Search Layouts > Accounts List View** and the screen will look like this.

Custom Buttons

Available Buttons:

Selected Buttons:

Add Remove Up Down

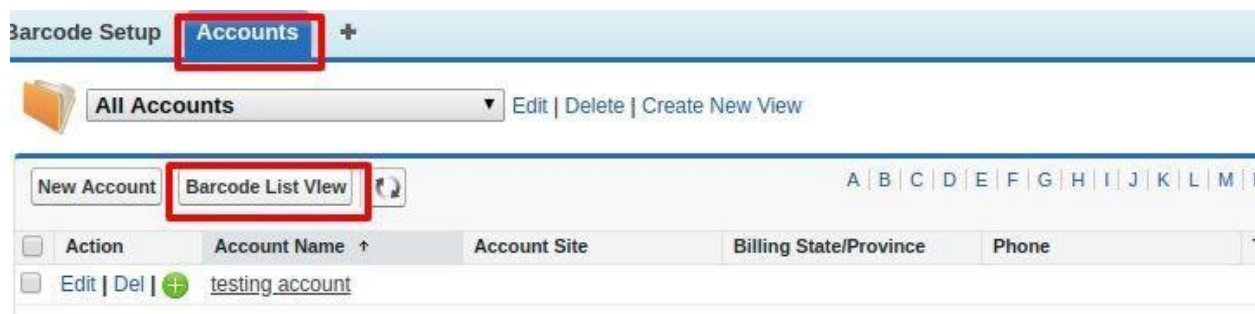
Custom Buttons

Available Buttons:

Selected Buttons:

Add Remove Up Down

And after adding button to list view of account and user will get the button on the subject list view page and the screen will look like this.



Note : Currently List view button works only for maximum 50 Records. It will generate barcode for any field and attach as file for those records

4. Smart Barcode Functionality

Steps to be followed and Navigation Screenshots for Classic View

1. After creating a button on the account detail page, users need to click on the “**Generate Smart Barcode**” button. So that the screen will look like this.

A screenshot of a web application interface for generating barcodes. At the top, there's a navigation bar with 'Home', 'Smart Barcode', 'Smart Barcode Setup', and 'Accounts'. Below this is a yellow note box that says: 'Note : If barcode is not generated for any field. It means value is either blank or not compatible with Selected Format.' The main heading is 'Generate Barcode'. Below this is a form with three rows: 'Select Format Type' with a dropdown menu showing 'Code 128', 'Select Field' with a dropdown menu showing 'Account ID', and 'Email Id' with a text input field. At the bottom of the form are four buttons: 'Generate BarCode' (highlighted with a red rectangle), 'Generate BarCode In PDF', 'Attach as pdf', and 'Email as pdf'.

In that user can easily choose the barcode format type by clicking on “**Select Format Type**” picklist field and also easy select the field which he/she wants to generate the barcode.

Home Smart Barcode Smart Barcode Setup Accounts +

Note : If barcode is not generated for any field. It means value is either blank or not compatible with Selected Format.

Generate Barcode

Select Format Type Code 128 ▼

Select Field Account ID ▼

Email Id

[Generate BarCode](#) [Generate BarCode In PDF](#) [Attach as pdf](#) [Email as pdf](#)



0016F00003hVC95QAG

After clicking on the “**Generate Barcode**” button the user will get the barcode. And the screen will look like as seen in the above mentioned figure.

In that the end user will generate the barcode of the “**ACCOUNT ID**” field in “**CODE 128**” format. Users will again easily create the barcode for the format “**CODE 39**”, “**EAN 13**”, “**EAN 8**”, “**Code 11**”, “**Code 25**”, “**Code 93**”. If the field value is not compatible with the barcode format then then the barcode will not be generated and it will give you an error.

And the same as the user will generate a barcode from the list view of the account list page, by clicking on the button named “**Generate Smart Barcode**”. And the screen will look like this.

New Account

Generate Smart Barcode

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other

☐	Action	Account Name ↑	Barcode	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
☒	Edit Del	Code 128 Test 83						adev
☒	Edit Del	Code 128 Test 84						adev
☒	Edit Del	Code 128 Test 85						adev
☐	Edit Del	Code 128 Test 86						adev
☐	Edit Del	Code 128 Test 87						adev
☐	Edit Del	Code 128 Test 88						adev

Users can select multiple accounts to generate barcodes for all of them at a single time. After selecting more than one account user will click on the “**Generate Smart Barcode**” button to generate a barcode for all of them by single click.

Note : If barcode is not generated for any field. It means value is either blank or not compatible with Selected Format.

Generate Barcode

Select Format Type	Code 128 ▼
Select Field	Account ID ▼
Email Id	

Generate BarCode

Generate BarCode In PDF

Attach as pdf

Email as pdf



0017F00001IV9zXQAS



0017F00001IV9zYQAS



0017F00001IV9zZQAS

As the user can see on our screen, he can get a barcode for all of them in a single time on a single page.

Steps to add button for List View on an Object in Lightning:

1. For a particular Object, User Needs to create a Visualforce page for that particular Object. We have added a default Visualforce page ("BarcodeLightningListView") for 'Account' Object.
2. User needs to copy that code and paste it in a newly created Visualforce page and in **StandardController** use its own Object Api name. Like standardController="Account" so instead of Account user can use required Object Api name.
3. User needs to create a **list button** on that object and added newly created Visualforce page in this button. Here we created a list button named **GenerateBarcodeLightningListview** on **Account** Object and In the **Content source** list we choose **visualforce page** and add our visualforce page and hit the **Save** button.

Setup Home Object Manager

SETUP > OBJECT MANAGER
Account

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Edit Account Custom Button or Link
GenerateBarcodeLightningListView

Custom Button or Link Edit Save Quick Save Preview Cancel

Label: GenerateBarcodeLightningLi
Name: GenerateBarcodeLightningLi
Namespace Prefix: SmartBarcode
Description:
Display Type:
☐ Detail Page Link [View example](#)
☐ Detail Page Button [View example](#)
☒ List Button [View example](#)
☒ Display Checkboxes (for Multi-Record Selection)
 Behavior: Display in existing window with sidebar [View Behavior Options](#)
 Content Source: Visualforce Page
 Content: BarcodeLightningListView [SmartBarcode__BarcodeLightningListView]
 Save Quick Save Preview Cancel

Quick Tips
 • [Getting Started](#)
 • [Sample Buttons & Links](#)
 • [Operators & Functions](#)

4. User needs to add this list button in **List View** of that Object. For this user needs to go List view in '**Search Layouts For salesforce Classic**' option in that object and then edit List View .

Setup Home Object Manager

SETUP > OBJECT MANAGER
Account

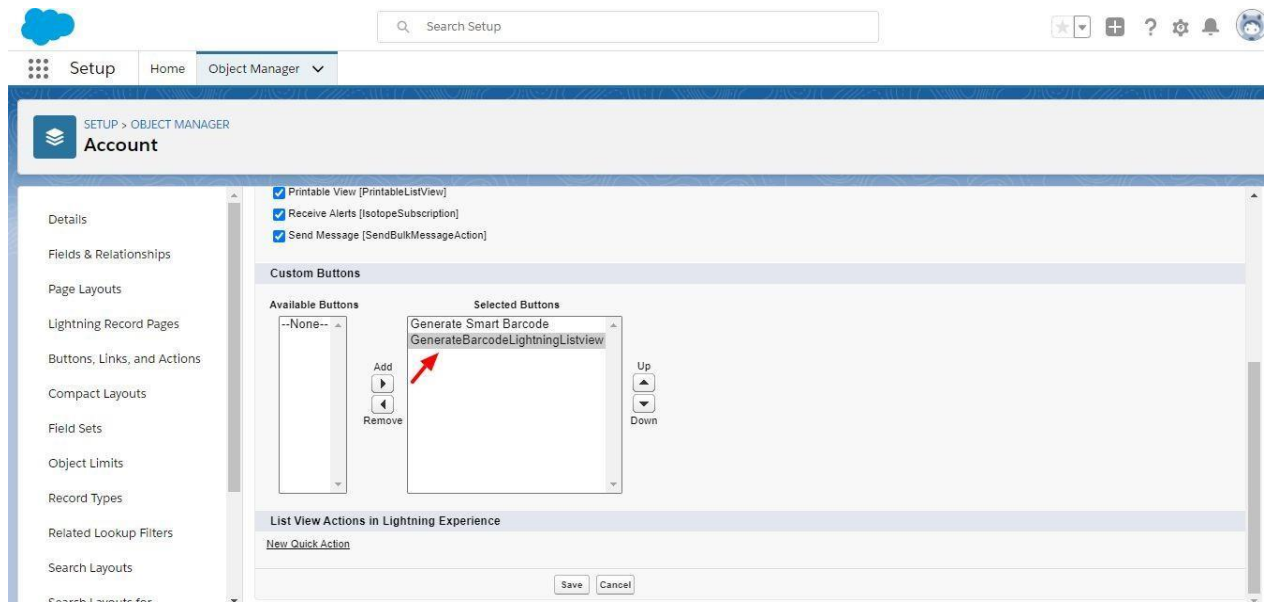
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Search Layouts for Salesforce Classic
Hierarchy Columns
Triggers
Validation Rules

Search Layouts
5 Items, Sorted by Layout

Quick Find

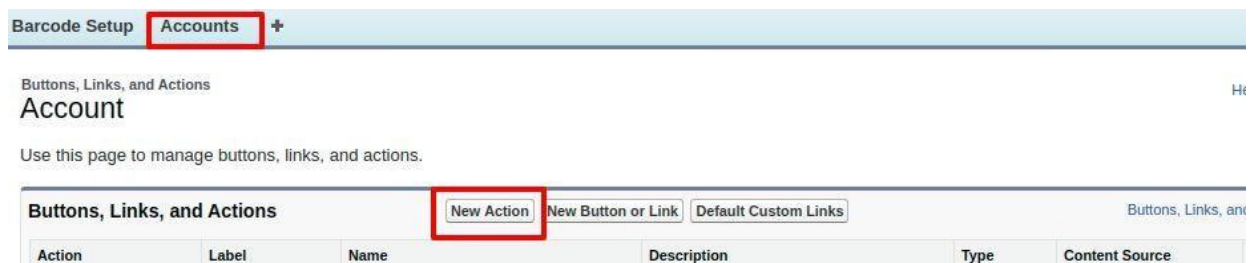
LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED
List View	N/A	New, Open In Quip, Clean, Get More Accounts, Discover Companies, Add to Call List, Printable View, Receive Alerts, Send Message, Generate Smart Barcode, GenerateBarcodeLightningListView
Lookup Dialogs	Account Name, Account Site, Account Owner Alias, Type	N/A
Lookup Phone Dialogs	Account Name, Account Site, Account Owner Alias, Type, Phone	N/A
Search Filter Fields	N/A	N/A
Tab	Account Name, Billing City, Phone	N/A

5. and add this list button in List View, and hit the Save Button.



For lighting users : need to create one action named “**Generate Smart Barcode**” on subject. And also need to create its “**My Domain**”. By searching my domain in QuickFind / Search box. And create our domain to enable this setting.

After creation of my domain user will get a notification mail in the register mail id with the org and go to the login process. And then create the action from the account “**Buttons, Clicks and Actions**”. And the user screen will look like this.



Barcode Setup **Accounts** +

Account Actions
New Action

Enter Action Information Save Cancel

Object Name: **Account** ⓘ

Action Type: Lightning Component ▾

Lightning Component: **SmartBarcode:GenerateBarCode** ⓘ

Height: 250px ⓘ

Standard Label Type: --None-- ⓘ

Label: **Generate Smart Barcode Ligh**

Name: **Generate_Smart_Barcode_Lic** ⓘ

Description: ⓘ

Icon: ⚡ [Change Icon](#)

Save Cancel

And then go through the account “**Edit Layout page**”, End user screen will look like this.

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

Quick Find Mobile Action Name *

Add to Call List	Change Record Type	Disable Customer ...	Email (mobile only)	Generate BCL	Guest Community Case	Log a Call
Add to Campaign	Check for New Data	Disable Partner A...	Enable As Partner	Generate Smart Ba...	Include Offline	Mobile Smart A
Call	Create New Contact	Edit	Generate BC	Get Contacts	Link	New Account
Change Owner	Delete	Email	Get Survey Invita...	Log a Call	New Case	

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

Salesforce Mobile and Lightning Experience Actions ⓘ

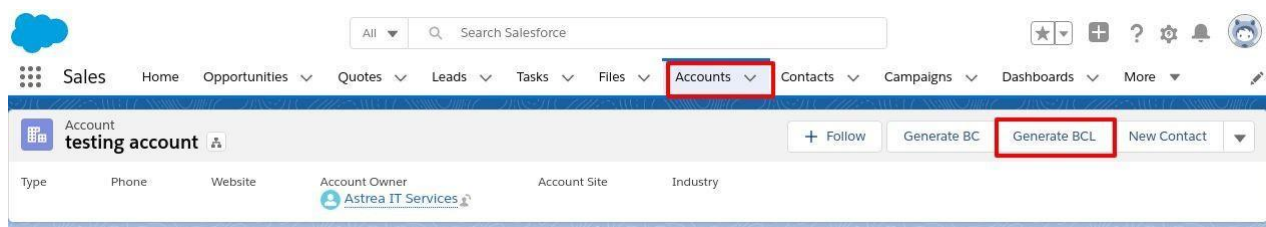
Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event Link

Check for New Data Submit for Approval Get Contacts Edit Delete Change Record Type Sharing View Account Hierarch

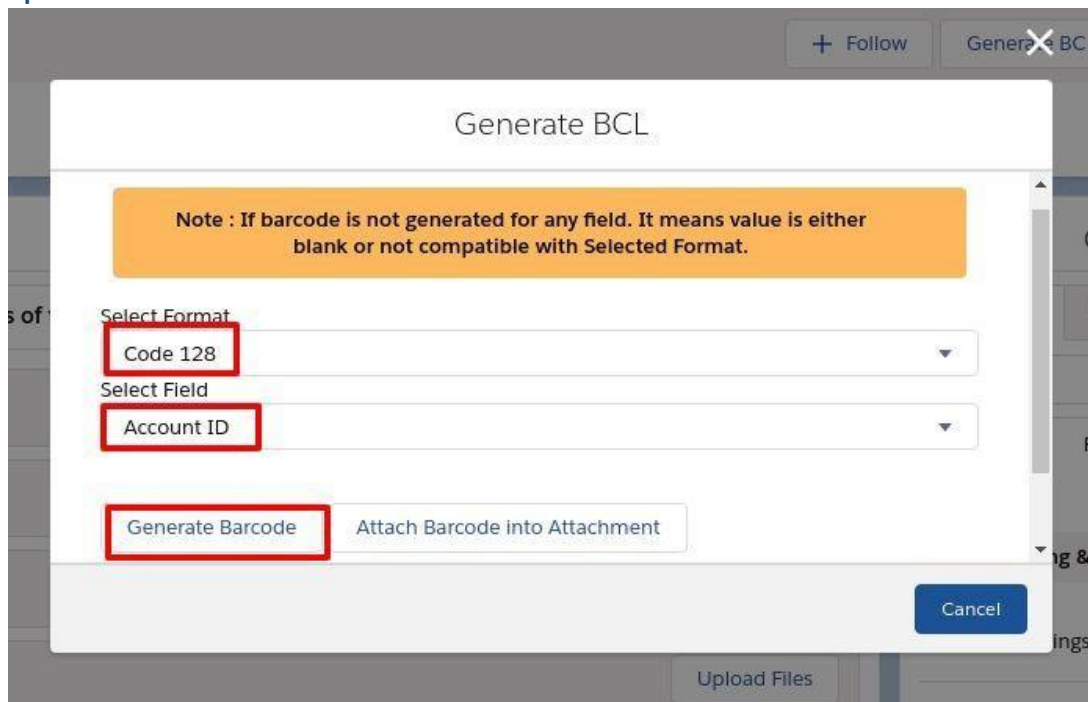
Drag the created button from the arrow directional area and then click to the save button. For the classic user, go through this image and switch to the Lightning Experience,



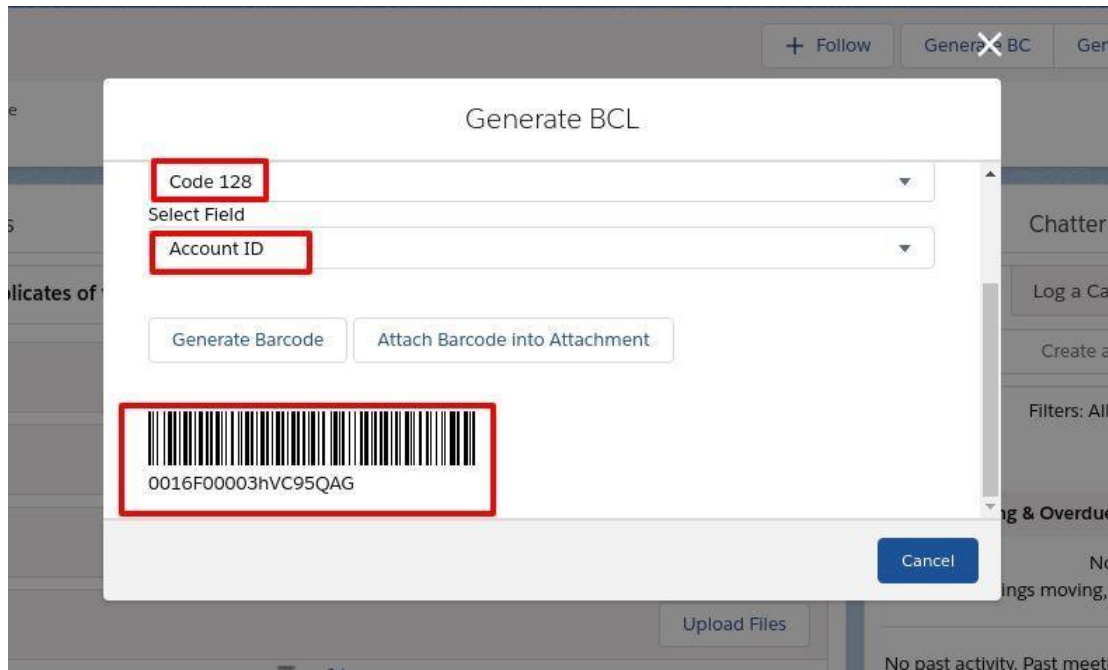
And then click on the account tab and then click on custom lightning action “**Generate BCL**”. or Whatever name user gave to his custom lightning action.



And then a pop up window is open in that user can select the format and the subject field to generate the barcode for that specified field with specific format.



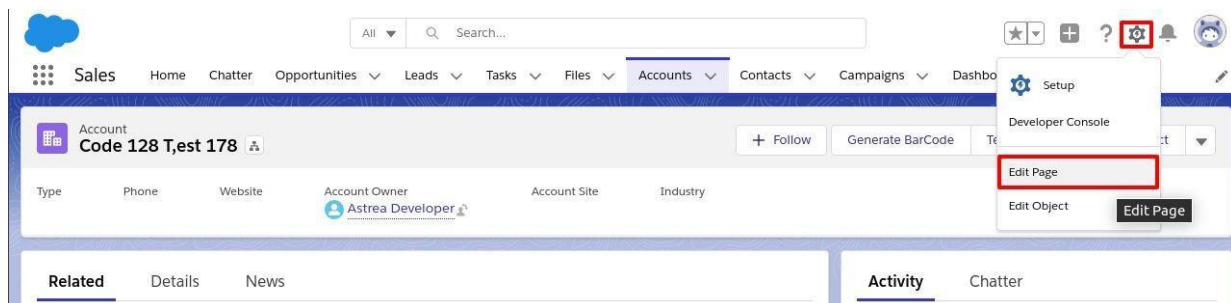
As discussed in the classic same for the Lightning, the end user will change the format for the specific field and these are “**CODE 128**”, “**CODE 39**”, “**EAN 13**”, “**EAN 8**”, “**Code 11**”, “**Code 93**”, “**Code 25**”.



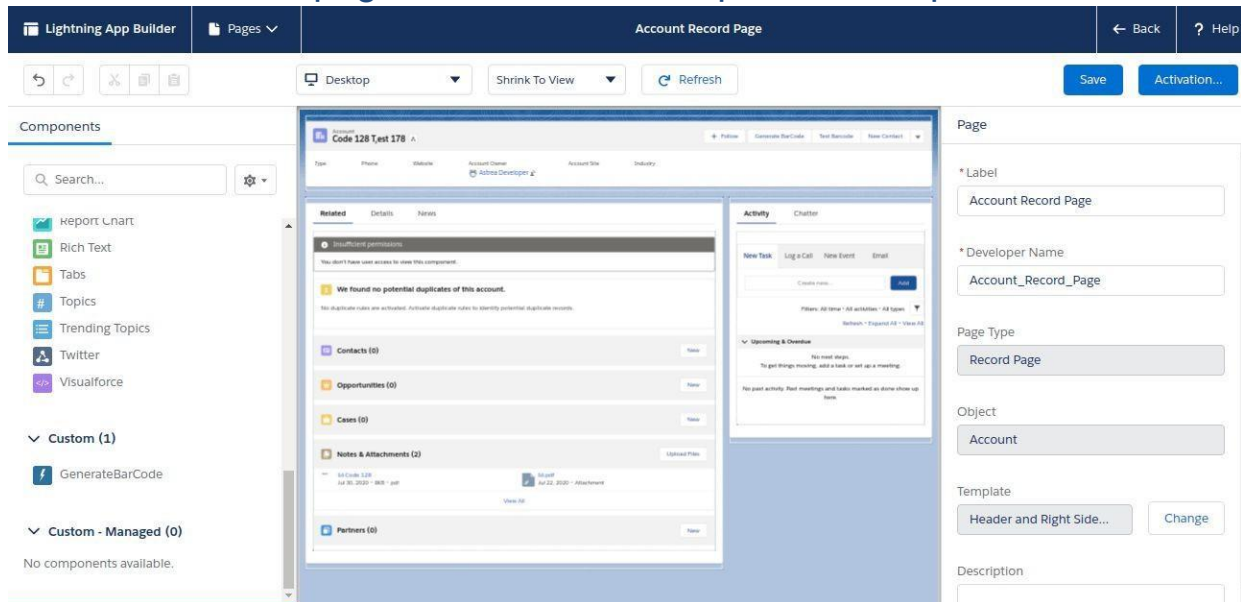
User can also attach this barcode component in lightning page or in record page related list section.

Steps to attach barcode component-

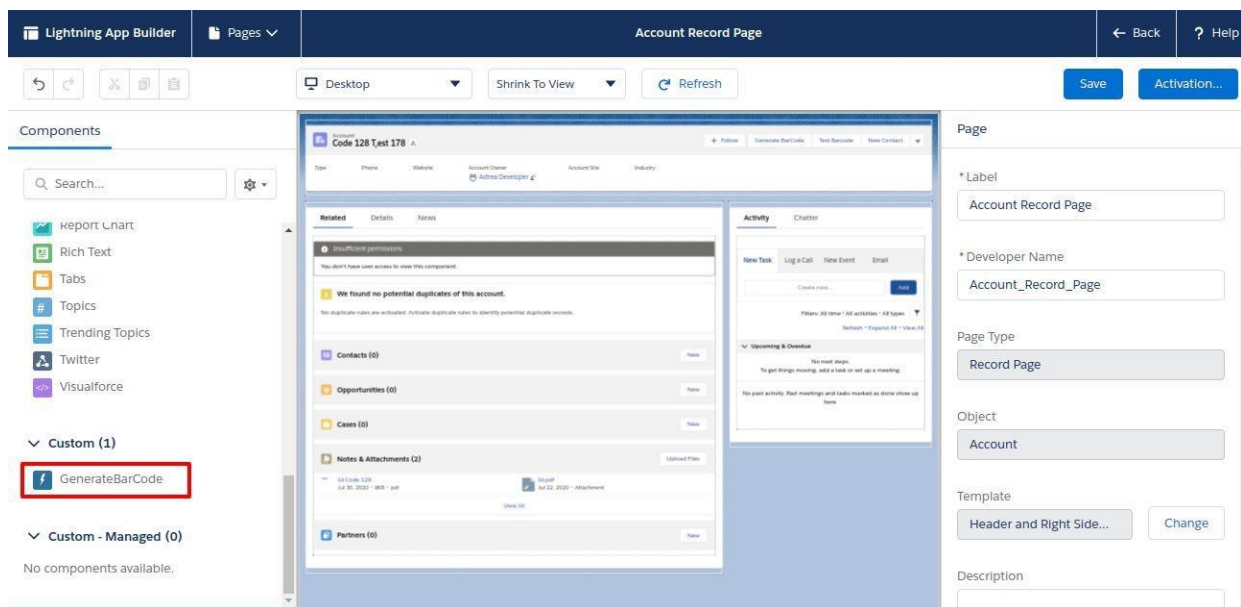
Step 1 :- Click on gear icon in the right corner of the lightning page and then click on Edit page.



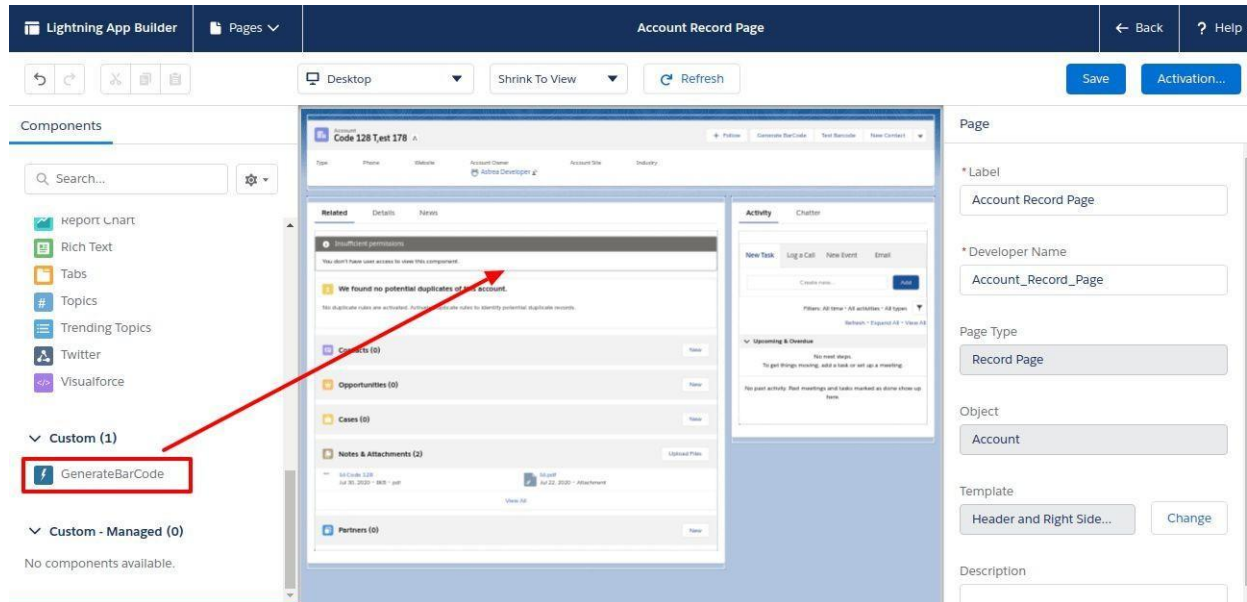
After click on Edit page screen like below picture will open



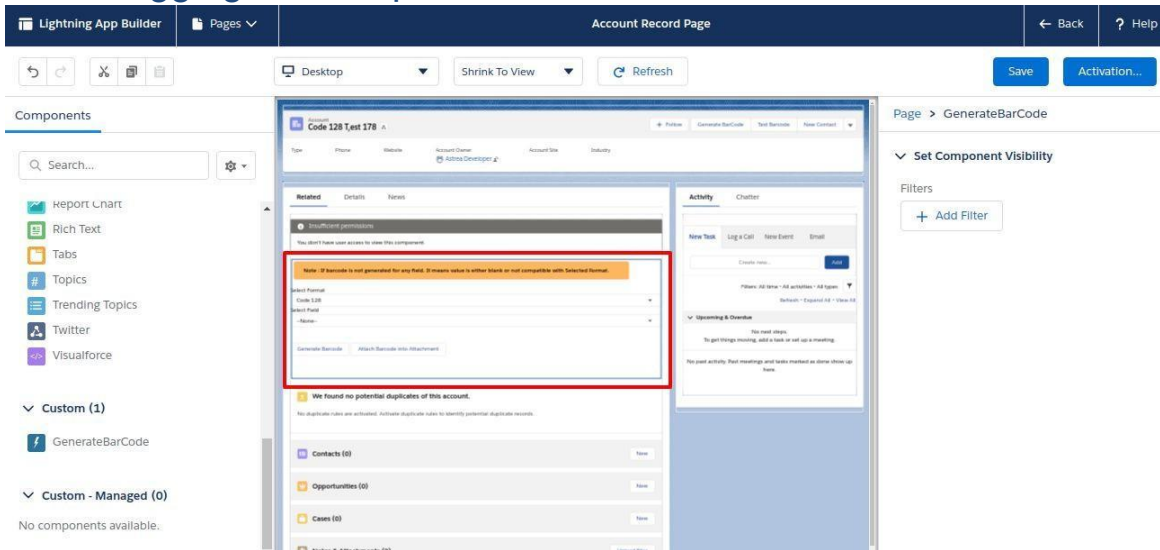
Step 2:- Scroll down Component section and find “**GenerateBarCode**” custom lightning component.



Step 3:- Drag the “**GenerateBarCode**” component to the “**Related**” Section.



After dragging the component it will look like-



Then click on **save** and then **back**. Your component will be attached successfully.

Account

Code 128 Test 178

+ Follow

Generate BarCode

Test Barcode

New Contact

Type

Phone

Website

Account Owner

Astrea Developer

Account Site

Industry

Related

Details

News

Note : If barcode is not generated for any field. It means value is either blank or not compatible with Selected Format.

Select Format

Code 128

Select Field

--None--

Generate Barcode

Attach Barcode into Attachment

Activity

Chatter

New Task

Log a Call

New Event

Email

Create new...

Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.

To get things moving, add a task or set up a meeting.