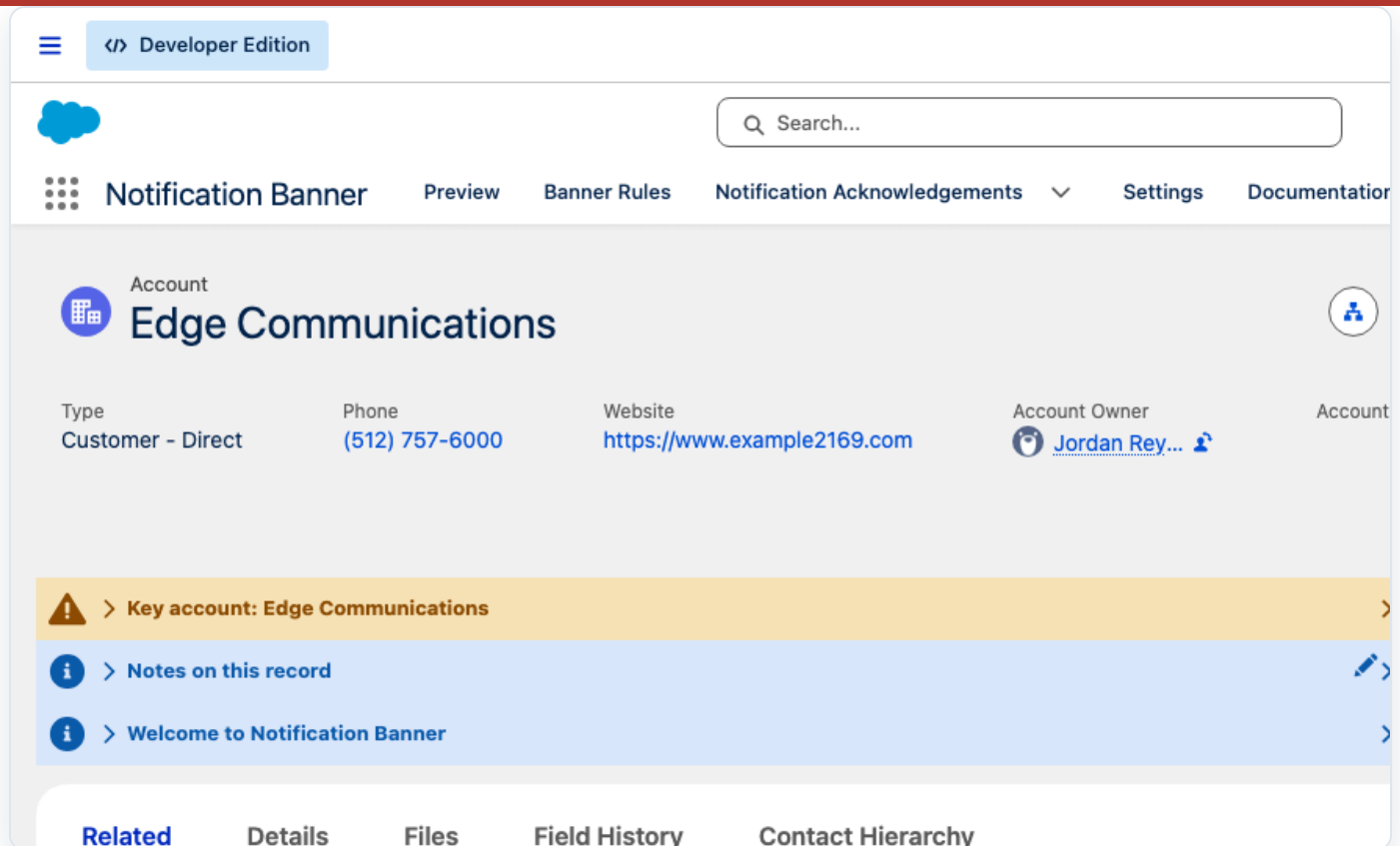


Notification Banner

Put the right message in front of the right people, on the right Salesforce page, without a developer.

**3**

rule types: Org Wide, Record Condition, User Controlled

0

lines of code or deployments to publish a banner

5

languages: English, German, Spanish, French (CA), Portuguese (BR)

Notification Banner shows targeted messages on Salesforce pages: an **org-wide announcement**, a **warning on particular records**, or a flag that **follows a relationship** from a parent record to its children. Admins write the rules in the app and a banner appears within seconds. Teams can also leave **notes on a record** for each other.

Important messages get lost in email and chatter

A maintenance window, an account on credit hold, a case past SLA. Teams need to know at the moment they open the record, not in an email they scrolled past last week. Building that with custom code or page-by-page workarounds is slow and hard to maintain.

1

Reach people where they work

Banners show on the **Home page, record pages and a Notifications panel** in the Utility Bar, in the severity colour you choose.

2

Target precisely

Show a banner on every page for everyone, on records that match **conditions you set**, or only to a chosen audience.

3

Flags that follow relationships

A warning on an account can also show on its **contacts and cases**, naming the account, so nobody misses it.

4

Prove it was read

Ask for acknowledgement and see **who has not yet clicked through**, with a CSV download for follow-up.

5

Speak your users' languages

Provide banner text in several languages and each user sees their own, with a fallback order you control.

6

Let teams leave notes

User Controlled Banners let people in an audience post their own notes onto a record, without an admin writing a rule for each.

Without Notification Banner

- Announcements by email that people miss
- Record warnings need custom code or a changed layout
- No way to tell who has seen a policy change
- Every message in one language

With Notification Banner

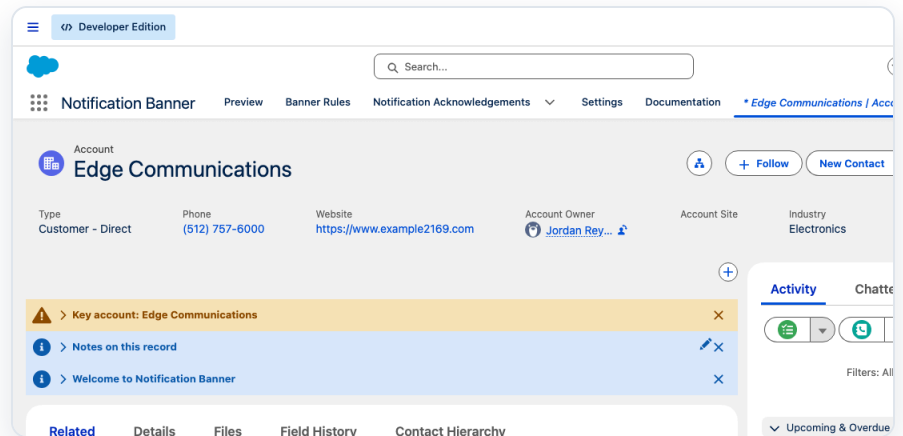
- A banner on the page, in the right severity colour
- Rules by condition, audience and relationship
- A list of who has not acknowledged
- Banner text in each user's language

WHAT IT DOES

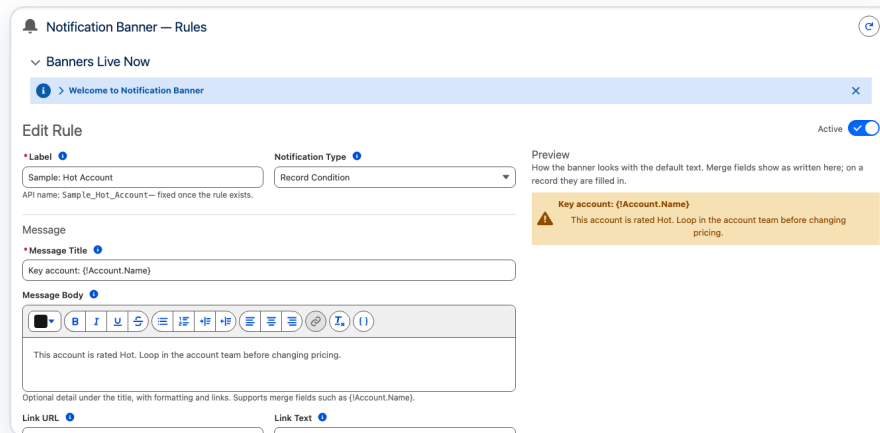
Banners that appear when they matter

On the record, where the work happens

A colour and icon show importance. Click a banner to expand the detail. A banner on a child record can come from its parent, and a plus button lets users add a note.



Banners on an Account page.



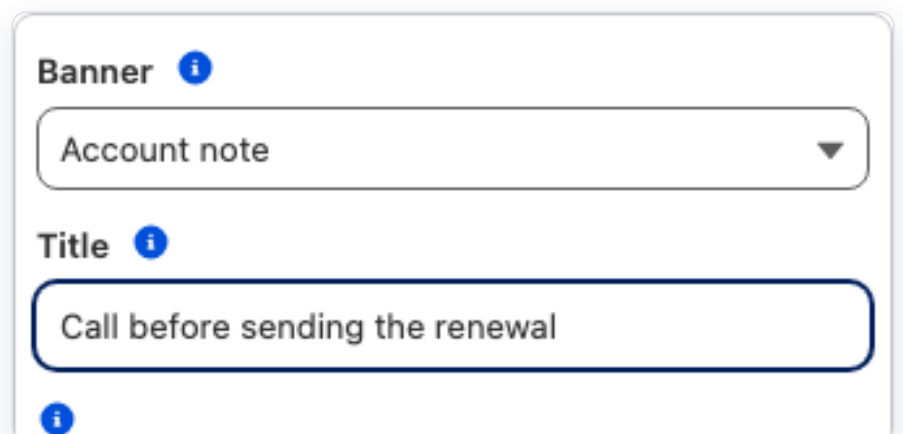
The rule editor.

Rules in a few clicks

Each message is a rule with a type, severity, message, link, audience and conditions. Merge fields insert record values into the text, and a live preview shows the result.

In the Utility Bar too

A Notifications panel in the Utility Bar keeps every banner one click away on any page, and lets people post their own banner notes.



The Utility Bar panel.

WHAT IT DOES, CONTINUED

Admin control without code

Not Acknowledged Yet: Expense Policy Update

People in this rule's audience, as last saved, who have not clicked I've Read This. This counts people, not records: on a rule someone may not have seen a matching record yet.

Name	Username	Profile
Jordan Reyes	jordan.reyes@example.com	System Administrator
Alex Morgan	alex.morgan@example.com	Analytics Cloud Integration User
Sam Okafor	sam.okafor@example.com	System Administrator
Taylor Brooks	taylor.brooks@example.com	Analytics Cloud Security User

D

Not acknowledged yet.

All your rules in one list

One row per rule with its type, severity, conditions and whether it is active. Search, start from a template, and see what is live right now.

Notification Banner — Rules

Banners Live Now

Welcome to Notification Banner

Each rule is one banner. Rules decide what the banner says, who sees it, and when. Text can be entered per language — a viewer sees their own language, falling back through the order set on the Settings tab.

Q Search by rule, title or ty

New from Template

+ New Rule

Rule	Active	Title	Type	Severity	Conditions	Acti...
Account Alert	✓	User Note on: (!Account.Name)	User Controlled Ba...	Warning	Matches any record of the target object	
Account Name User Info	✓	Account notification for: (!Account.Name)	User Controlled Ba...	Info	Matches any record of the target object	
Account note	✓	User Created Note	User Controlled Ba...	Info	Matches any record of the target object	
Org Wide banner limited Audie...	✓	Org Wide Limited Audience	Org Wide	Info	Matches any record of the target object	
Policy Reminder	✓	Please review the updated policy	Org Wide	Info	Matches any record of the target object	
Sample: Account On Hold	✓	Account on hold: (!Account.Name)	Record Condition	Error	Matches any record of the target object	
Sample: Hot Account	✓	Key account: (!Account.Name)	Record Condition	Warning	Matches any record of the target object	
Sample: Welcome	✓	Welcome to Notification Banner	Org Wide	Info	Matches any record of the target object	

The Banner Rules tab.

Notification Banner — Preview

Welcome to Notification Banner

See what a user would get on a given record, without leaving the app. This runs the real rules through the same component users see, so what appears here is what they get — except that banners you have dismissed are still shown, since hiding them would defeat the point.

Object

Account

Record

Edge Communications

Preview as another user

Q Search active users by name

Key account: Edge Communications

Notes on this record

Welcome to Notification Banner

Why Each Rule Did or Didn't Show
Every rule, for the object, record and user chosen above.

Rule	Result
Sample: Account On Hold	This record does not meet the rule's conditions
Sample: Hot Account	Shown
Account note	A User Controlled Banner rule shows no banner of its own

The Preview tab.

Acknowledgements that can be audited

For rules that require it, see which people in the audience have not yet clicked through, and download the list as CSV.

Preview before you publish

Pick an object and a record, even as another user, and see exactly which banners would show and why a rule did not.

HOW IT WORKS

Up and running in four steps

1. Assign access

Give admins the **Notification Banner Admin** set; everyone who should see banners needs one of the three sets.

2. Write a rule

Choose a type, write the title and message, and set severity, audience and conditions.

3. Place the container

Add the **Notification Banner Container** to a page or the Utility Bar.

4. Publish

Save. The banner is deployed and appears within seconds.

Who it is for

- **Salesforce admins.** announce changes and flag records without building anything.
- **Account, support and finance teams.** see warnings on the record the moment they open it.
- **Compliance and operations.** confirm that a policy change was acknowledged.

Built for trust

- **Banners never reveal anything a user could not already see.** Every record read runs in the viewer's own context, honouring sharing and field-level security.
- **Native to Salesforce.** Rules live in your org as Custom Metadata; nothing external.
- **Three permission sets:** Admin, User and Read Only.
- **In-app Administrator and User guides** in five languages.

Everything included

- ✓ Org Wide, Record Condition and User Controlled rules
- ✓ Show on children: a banner that follows a relationship
- ✓ Severity colours and icons
- ✓ Home page, record page and Utility Bar placement
- ✓ Conditions with AND/OR logic
- ✓ Audience targeting
- ✓ Merge fields in the message

- ✓ Multilingual banner text with fallback order
- ✓ Acknowledgement and a not-acknowledged list
- ✓ Preview as an object, record or user
- ✓ Starter rule templates
- ✓ Settings tab for global behaviour
- ✓ Admin, User and Read Only permission sets
- ✓ In-app guides in five languages

Publish your first banner today

Notification Banner is built, tested and documented. Ask for a walk-through with a banner built for one of your own records.