

User Manual for

In-App Ideas



Aug, 2025

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****Note* - Before you begin using the 'In-App Ideas' app, make sure the post-installation tasks from *Installation Guide for In-App Ideas* have been completed by your Administrator.

Introduction: User Interface Access

The In-App Ideas application provides two distinct user interfaces based on the user's role: **End User** and **Product Owner (PO)**.

1. End User Access

End users interact with a streamlined interface designed for quick feedback and collaboration. They can:

- Submit new ideas
- View the list of submitted ideas
- Vote or unvote on existing ideas
- Comment on ideas
- Access basic reports

This simple interface makes it easy for end users to participate in the idea-sharing process without complexity or distraction.

2. Product Owner Access

Product Owners (POs) have full access to all end-user features, plus additional administrative tools. They can:

- View the Prioritization Center
- Assign ideas to specific Prioritization Cycles
- Create, manage, and close Prioritization Cycles

Key Notes on Use

This application is **not** designed to replace a full Application Lifecycle Management (ALM) tool. Instead, it serves as an **intake and prioritization tool** within Salesforce CRM.

Once a Prioritization Cycle is finalized, Product Owners are expected to export the selected ideas and import them into an external ALM tool like Jira for development and sprint planning.

In-App Ideas is purpose-built to:

- Capture ideas directly from end users within Salesforce
- Increase engagement through voting, commenting, and visibility
Align enhancements with actual user and business needs
- Give Product Owners a structured way to prioritize feature development

How to Submit Ideas

To submit an idea, follow these steps:

1) Open the Idea Submission Form

- Click the Submit Ideas button located in the bottom-left corner of the screen.
- This will open the Idea Submission Form.

2) Complete the Form Fields

- **Title (*Required*):**
Enter a clear, descriptive title for your idea.
As you type, the system will suggest existing ideas with similar titles to help prevent duplicates.
- **Type (*Required*):**
Select whether this is an Enhancement or a New Idea.
- **Details (*Required*):**
Provide a detailed explanation of your idea, including relevant context or pain points.
- **Upload Files (*Optional*):**
Attach any supporting documents, screenshots, or files.

The screenshot shows the 'Submit Idea' form in the 'In-App Ideas' application. The form is titled 'Idea Submission Form' and includes the following sections:

- Title:** A text input field containing 'Test Idea'.
- Type:** A dropdown menu with 'New Idea' selected.
- Details:** A rich text editor with a toolbar (font, size, bold, italic, underline, link, unlink, list, indent, outdent, undo, redo) and a text area containing 'Hello This is **testing** Record.'
- Upload File:** A section with an 'Upload Files' button and a file list showing 'sample (1) (1).pdf'.
- Buttons:** 'Submit' and 'Cancel' buttons at the bottom left. The 'Submit' button is highlighted with a red box.
- Current Ideas List:** A button at the top right of the form.

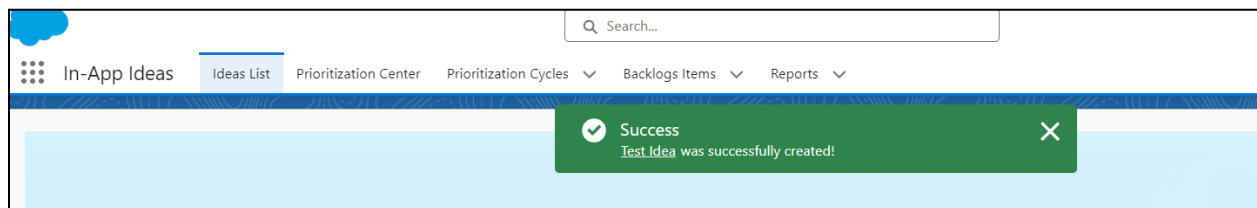
On the right side of the form, there is a preview of the 'Current Ideas List' showing a table with columns: Name, Votes, Date. It lists three items, each with a thumbs-up icon, a 'Vote Count' of 0, and a 'Comments' count (0, 1, and 0 respectively). Each item has an 'Open' button and an 'Under Development' button.

3) Submit the Idea

- Click the Submit button.

A confirmation toast notification will appear with a link to view the newly created idea.

You've now successfully submitted an idea!



View Your Submitted Ideas

You can review your submissions at any time:

- Click the **Current Ideas List** button, or
- Navigate to the **Ideas List** tab in the app.

The screenshot shows the 'In-App Ideas' interface. At the top, there's a navigation bar with tabs: 'In-App Ideas', 'Ideas List', 'Prioritization Center', 'Prioritization Cycles', 'Backlogs Items', and 'Reports'. Below this, the 'Submit Idea' form is displayed. The form has a title field with 'Test Idea', a type dropdown with 'New Idea', and a details section with a rich text editor. A red box highlights the 'Current Ideas List' button in the top right corner of the form. The form also includes an 'Upload File' section with an 'Upload Files' button and a file list showing 'sample (1) (1).pdf'.

How to Access & View the Ideas List

(For End Users and Product Owners)

The **Ideas List** is your central dashboard for browsing, voting on, and commenting on ideas submitted by users within the In-App Ideas app.

1. Accessing the Ideas List

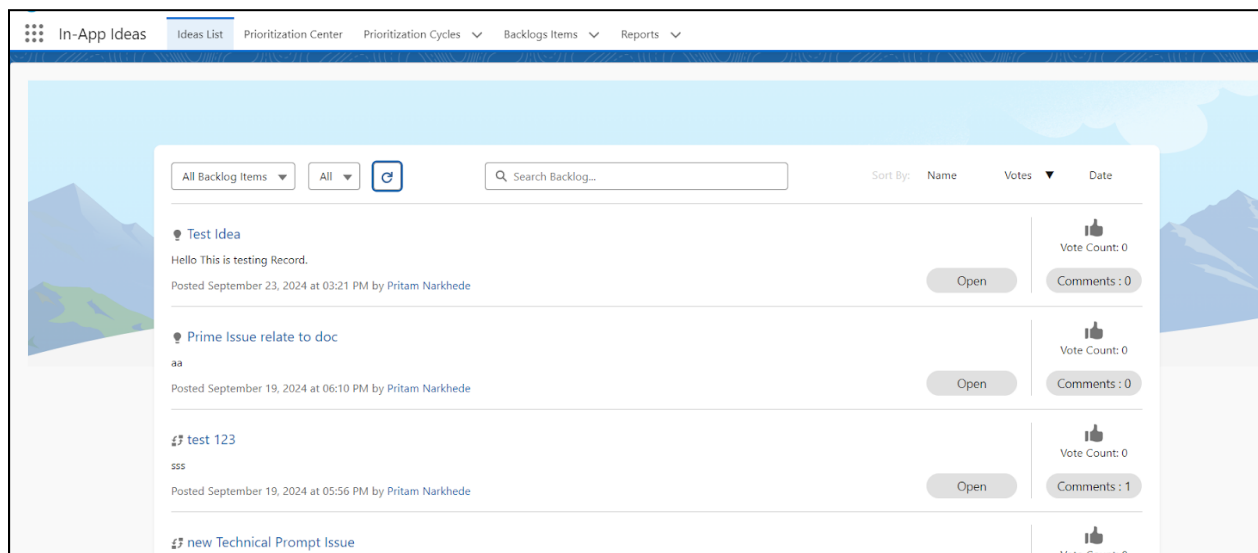
There are two ways to access the list of submitted ideas:

- Click on the Ideas List tab in the top navigation bar
- Or click the Current Ideas List button in the Idea Submission Form

2. Viewing Submitted Ideas

Each idea is displayed with the following key details:

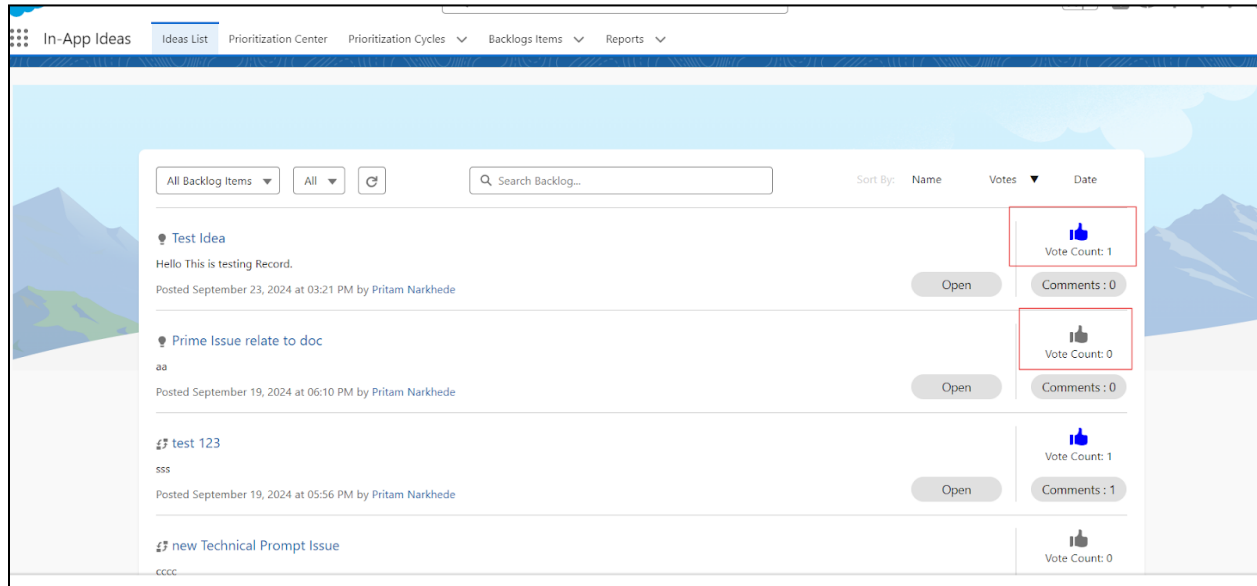
- Title and description
- Author and submission timestamp
- Vote count and comment count
- Status (e.g., Open, In Prioritization, Under Development)



3. Interacting with Ideas

Upvoting or Unvoting

- Click the **thumb icon** to vote on an idea
- Click again to remove your vote
Your vote influences which ideas are prioritized.



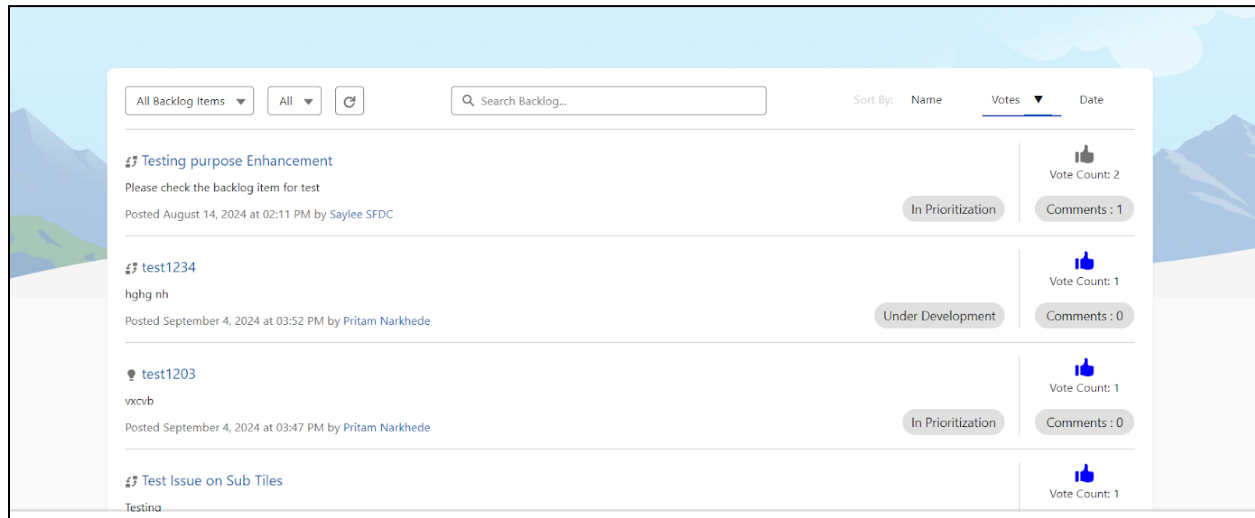
4. Comment on Ideas

- Click **Comments** to view existing feedback
Use the comment box to add your thoughts, clarify use cases, or collaborate with others

5. Sorting and Filtering Ideas

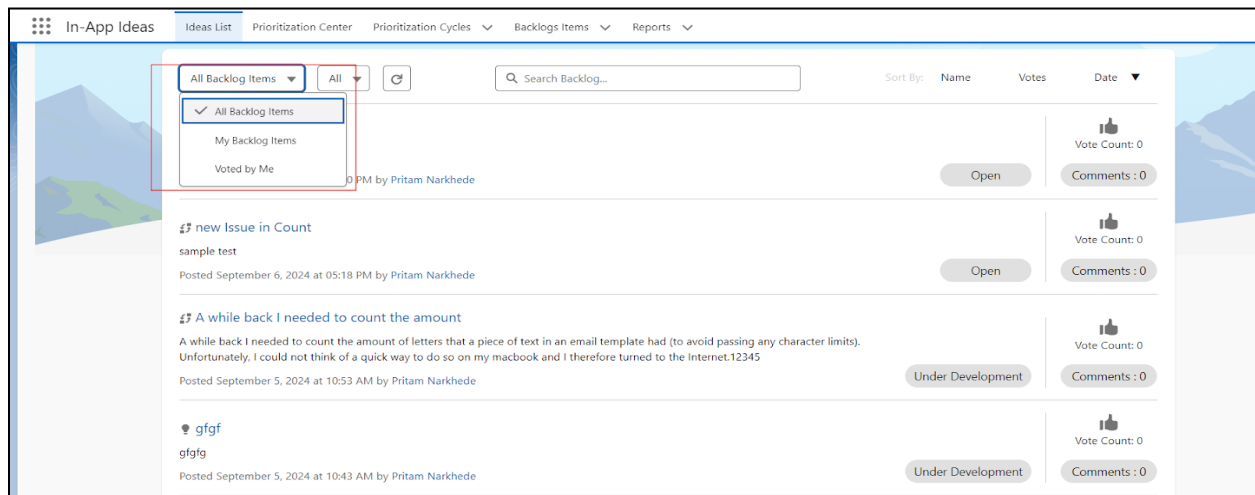
Sort Options

- **Name** – A to Z
- **Votes** – Highest to lowest
- **Date** – Most recent or oldest



6. Filter Options

- **All Backlog Items** – View all ideas
- **My Backlog Items** – Ideas you submitted
- **Voted by Me** – Ideas you voted for



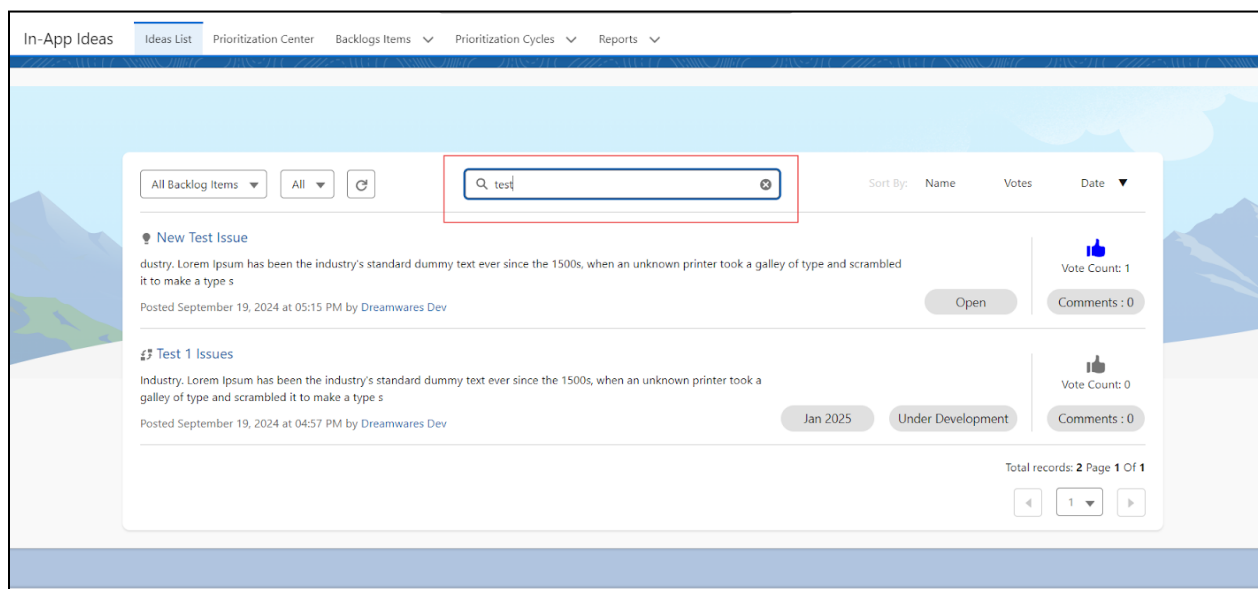
Status Filters:

- All
- Open
- In Prioritization
- Under Development

- Under Development

7. Searching for Ideas

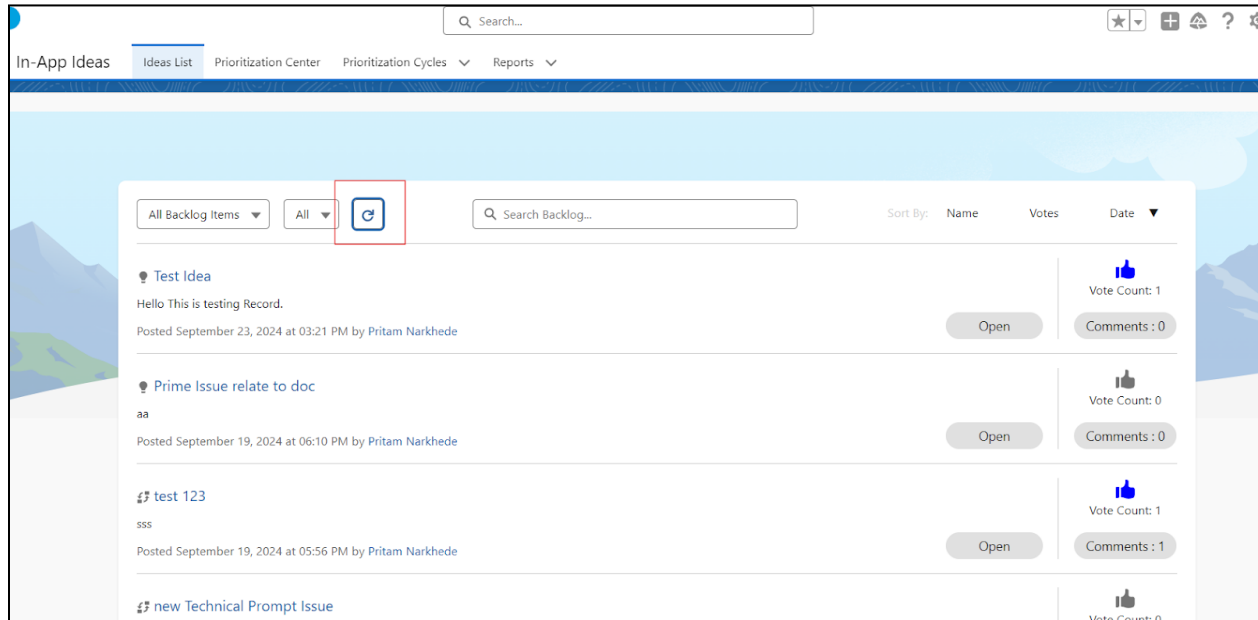
Use the **Search Backlog** bar to locate specific ideas by keyword. This is useful for quickly narrowing down a long list.



8. Refresh Functionality

Click the **Reset icon**

to refresh the list and load the latest updates—without needing to reload the full page.



This ensures you always see the most up-to-date information after new submissions, comments, or votes.

Prioritization Center (For Product Owners)

The 'Prioritization Center' is where Product Owners (PO) can view, manage, and assign ideas to specific prioritization cycles.

To access it, click the **Prioritization Center** tab in the top navigation bar.

Assigning an Idea to a Prioritization Cycle

In the Prioritization Center, you can either assign an existing cycle or create a new one.

Option 1: Assign to an Existing Cycle

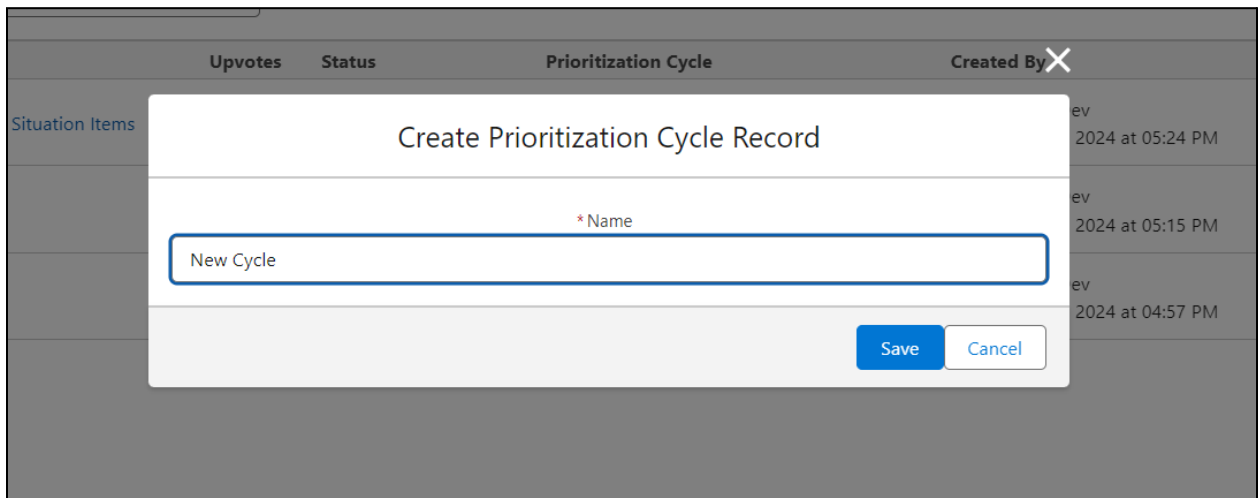
- 1) From the **Prioritization Cycle** dropdown, select an existing cycle for the idea.

2) Click **Save** to apply the change.

Option 2: Create a New Prioritization Cycle

Select **Create New Prioritization Cycle** from the dropdown.

2. Enter the name for your new cycle and click **Save**.

A screenshot of a web application interface. At the top, there is a header bar with four tabs: 'Upvotes', 'Status', 'Prioritization Cycle', and 'Created By' with a close icon. Below the header, on the left, is a sidebar with the text 'Situation Items'. The main area is a modal dialog box titled 'Create Prioritization Cycle Record'. Inside the dialog, there is a text input field with the placeholder text '* Name' and the value 'New Cycle'. Below the input field are two buttons: 'Save' (in blue) and 'Cancel' (in light blue). In the background, partially obscured by the dialog, is a table with columns corresponding to the header tabs. The 'Created By' column shows entries like 'ev 2024 at 05:24 PM', 'ev 2024 at 05:15 PM', and 'ev 2024 at 04:57 PM'.

3. Assign the new cycle to your idea and click Save.

Filtering Ideas by Prioritization Cycle

You can filter the list to view ideas by their associated cycle:

1. Click the dropdown labeled All Backlogs.

The screenshot shows the 'In-App Ideas' interface with the 'Prioritization Center' tab selected. A dropdown menu is open for 'All Backlogs', showing options: 'All Backlogs' (selected), 'Non Prioritized', 'Jan 2025', 'Feb 2025', 'March 2025', and 'Test 1 Issues'. The table below shows three items:

Select	Name	Upvotes	Status	Prioritization Cycle	Created By	Comments
☐	Implement Lock Situation Items	0	In Prioritization	Create New Prioritization Cycle	Dreamwares Dev September 19, 2024 at 05:24 PM	Comments : 0
☐	Test 1 Issues	1	Open	Select Prioritization Cycle	Dreamwares Dev September 19, 2024 at 05:15 PM	Comments : 0
☐	Test 1 Issues	0	Under Development	Jan 2025	Dreamwares Dev September 19, 2024 at 04:57 PM	Comments : 0

Buttons at the bottom: 'Move for Development', 'RESET', 'SAVE'. Total records: 3 Page 1 Of 1.

2. Select the desired cycle from the list.

3. The list will refresh to show only items in that cycle.

The screenshot shows the 'In-App Ideas' interface with the 'Prioritization Center' tab selected. The dropdown menu for 'All Backlogs' is now set to 'Jan 2025'. The table below shows two items:

Select	Name	Upvotes	Status	Prioritization Cycle	Created By	Comments
☐	Implement Lock Situation Items	0	In Prioritization	Jan 2025	Dreamwares Dev September 19, 2024 at 05:24 PM	Comments : 0
☐	Test 1 Issues	0	Under Development	Jan 2025	Dreamwares Dev September 19, 2024 at 04:57 PM	Comments : 0

Buttons at the bottom: 'Move for Development', 'RESET', 'SAVE'. Total records: 2 Page 1 Of 1.

Sort the Prioritization Center List

You can sort the ideas by n:

- Name: Alphabetically order
- Votes: Most to fewest votes
- Date: Newest to oldest (or vice versa)

Searching for Ideas

Use the Search Backlog bar to locate ideas using keywords. This helps you quickly find specific items without scrolling.

The screenshot shows the 'In-App Ideas' interface with the 'Prioritization Center' tab selected. At the top, there's a navigation bar with 'Ideas List', 'Prioritization Center', 'Backlogs Items', 'Prioritization Cycles', and 'Reports'. Below this, a search bar contains the text 'test'. To the right of the search bar, there are sort options: 'Sort By: Name', 'Votes', and 'Date'. The main area displays a table with the following columns: 'Select', 'Name', 'Upvotes', 'Status', 'Prioritization Cycle', 'Created By', and 'Comments'. The table contains two rows: one for 'New Test Issue' with 1 upvote and 'Open' status, and another for 'Test 1 Issues' with 0 upvotes and 'Under Development' status. At the bottom left, there is a 'Move for Development' button. At the bottom center, there are 'RESET' and 'SAVE' buttons. At the bottom right, it shows 'Total records: 2 Page 1 Of 1' and a pagination control showing '1'.

Select	Name	Upvotes	Status	Prioritization Cycle	Created By	Comments
☐	New Test Issue	1	Open	Select Prioritization Cycle	Dreamwares Dev September 19, 2024 at 05:15 PM	Comments : 0
☐	Test 1 Issues	0	Under Development	Jan 2025	Dreamwares Dev September 19, 2024 at 04:57 PM	Comments : 0

Move Item to Development

Once an idea is ready for the next stage:

1. Select your item by checking the box next to it.
Click the Move for Development button (bottom-left corner).
2. The idea's status will update to Under Development.

The screenshot shows the 'In-App Ideas' interface with the 'Prioritization Center' tab selected. A table lists three items: 'Implement Lock Situation Items', 'New Test Issue', and 'Test 1 Issues'. The first and third items are checked in the 'Select' column and have a status of 'In Prioritization'. A red arrow points to the checkbox for 'Implement Lock Situation Items'. At the bottom, a 'Move for Development' button is highlighted with a red box. The 'RESET' and 'SAVE' buttons are also visible.

Select	Name	Upvotes	Status	Prioritization Cycle	Created By	Comments
☒	Implement Lock Situation Items	0	In Prioritization	Jan 2025	Dreamwares Dev September 19, 2024 at 05:24 PM	Comments : 0
☐	New Test Issue	1	Open	Select Prioritization Cycle	Dreamwares Dev September 19, 2024 at 05:15 PM	Comments : 0
☒	Test 1 Issues	0	In Prioritization	Jan 2025	Dreamwares Dev September 19, 2024 at 04:57 PM	Comments : 0

Total records: 3 Page 1 Of 1

This status indicates that the item is now being actively worked on.

The screenshot shows the same 'In-App Ideas' interface after clicking the 'RESET' button. The status of the items has changed: 'Implement Lock Situation Items' and 'Test 1 Issues' are now 'Under Development', while 'New Test Issue' remains 'Open'. The 'Move for Development' button is still highlighted with a red box.

Select	Name	Upvotes	Status	Prioritization Cycle	Created By	Comments
☐	Implement Lock Situation Items	0	Under Development	Jan 2025	Dreamwares Dev September 19, 2024 at 05:24 PM	Comments : 0
☐	New Test Issue	1	Open	Select Prioritization Cycle	Dreamwares Dev September 19, 2024 at 05:15 PM	Comments : 0
☐	Test 1 Issues	0	Under Development	Jan 2025	Dreamwares Dev September 19, 2024 at 04:57 PM	Comments : 0

Total records: 3 Page 1 Of 1

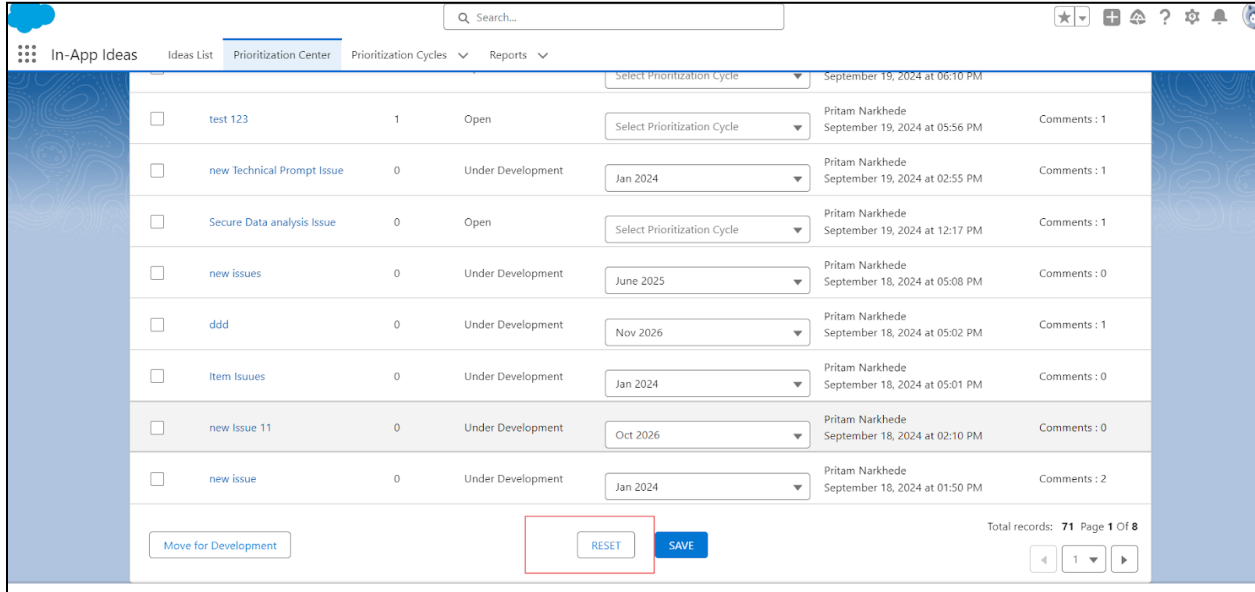
Reset Functionality

The Reset button refreshes your view without reloading the tab.

When clicked:

- The data reloads to its most current state
- Any unsaved changes are discarded

This is useful when others may have updated the list or when you want to start fresh.



				Select Prioritization Cycle	September 19, 2024 at 06:10 PM	
☐	test 123	1	Open	Select Prioritization Cycle	Pritam Narkhede September 19, 2024 at 05:56 PM	Comments : 1
☐	new Technical Prompt Issue	0	Under Development	Jan 2024	Pritam Narkhede September 19, 2024 at 02:55 PM	Comments : 1
☐	Secure Data analysis Issue	0	Open	Select Prioritization Cycle	Pritam Narkhede September 19, 2024 at 12:17 PM	Comments : 1
☐	new issues	0	Under Development	June 2025	Pritam Narkhede September 18, 2024 at 05:08 PM	Comments : 0
☐	ddd	0	Under Development	Nov 2026	Pritam Narkhede September 18, 2024 at 05:02 PM	Comments : 1
☐	Item Issues	0	Under Development	Jan 2024	Pritam Narkhede September 18, 2024 at 05:01 PM	Comments : 0
☐	new Issue 11	0	Under Development	Oct 2026	Pritam Narkhede September 18, 2024 at 02:10 PM	Comments : 0
☐	new issue	0	Under Development	Jan 2024	Pritam Narkhede September 18, 2024 at 01:50 PM	Comments : 2

[Move for Development](#) [RESET](#) [SAVE](#) Total records: 71 Page 1 Of 8

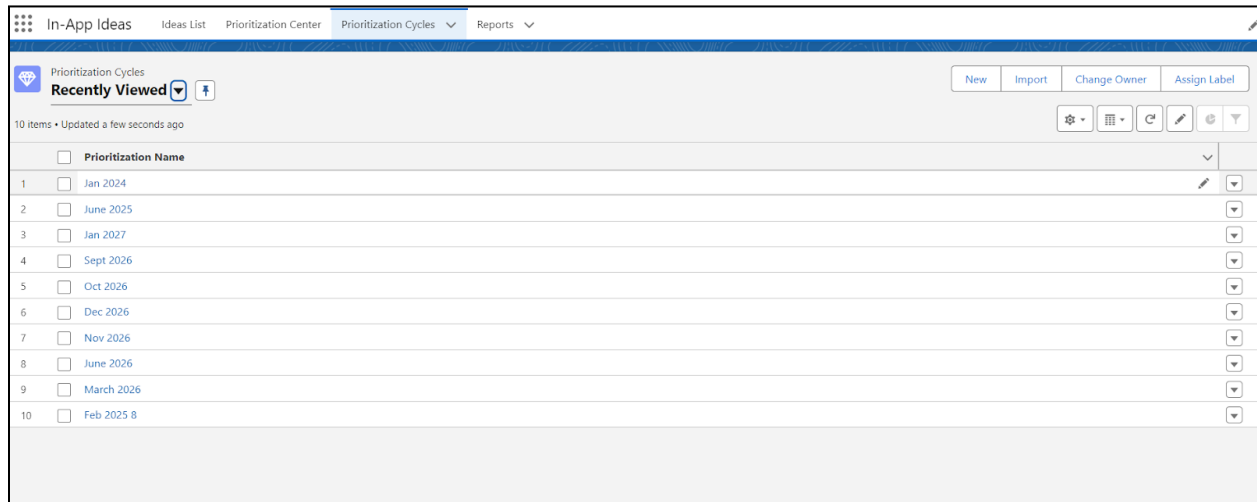
Manage Prioritization Cycle (For Product Owners):

The Prioritization Cycles section allows Product Owners to view and manage the details of all prioritization cycles.

How to View All Items Linked to a Specific Prioritization Cycle

Step 1: Navigate to the Prioritization Cycles tab from the top menu bar.

Step 2: A list of all prioritization cycles will appear. Click the name of the cycle you want to review.

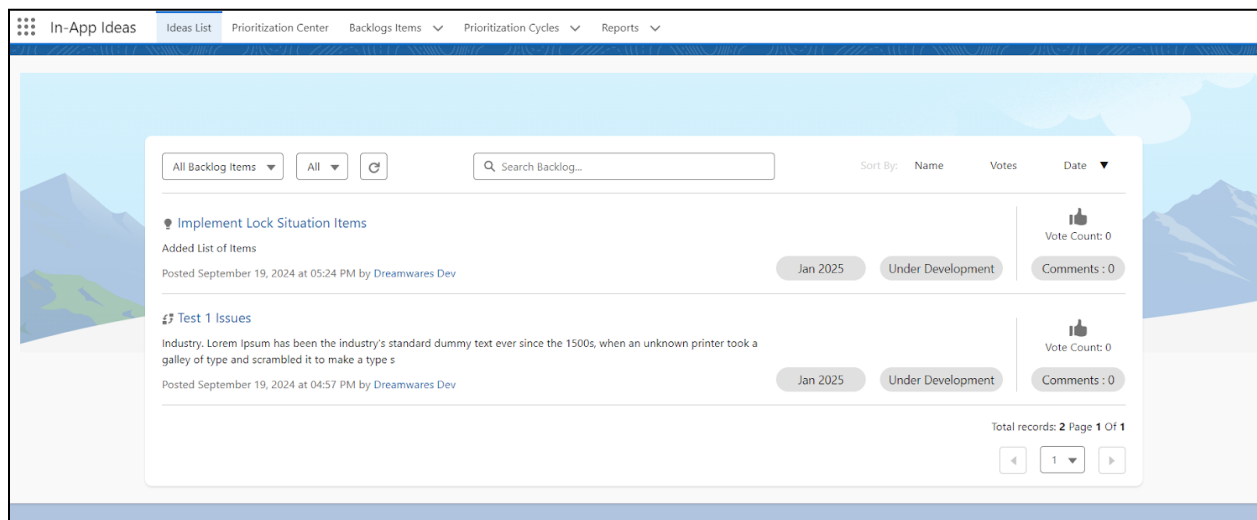


	Prioritization Name	
1	☐ Jan 2024	
2	☐ June 2025	
3	☐ Jan 2027	
4	☐ Sept 2026	
5	☐ Oct 2026	
6	☐ Dec 2026	
7	☐ Nov 2026	
8	☐ June 2026	
9	☐ March 2026	
10	☐ Feb 2025 8	

Step 3: In the Details section, click the Cycle Link.

This will redirect you to a filtered view showing all items linked to the selected prioritization cycle.

Step 4: You'll be taken to a list of backlog items associated with that cycle.



	Name	Date	Status	Votes
1	Implement Lock Situation Items	Jan 2025	Under Development	Vote Count: 0
2	Test 1 Issues	Jan 2025	Under Development	Vote Count: 0

Changing the Status of a Prioritization Cycle

To update the status of a cycle (e.g., Open → Open for Voting → Closed), follow these steps:

1. Open the Prioritization Cycle record.
2. Locate the Status Path at the top of the record.
3. Click the stage you want to set (e.g., *Open for Voting* or *Closed*).
4. Click the Mark Status as Complete button to confirm the change.
5. The status will update accordingly.

This process helps finalize and track the progression of your cycle from idea intake to execution.

Prioritization Cycle
June 2025

Delete Clone Edit

Open for Voting Closed for Voting Closed

✓ Mark Status as Complete

Related Details

Section

Prioritization Name June 2025	Status Open for Voting
Cycle Link https://dreamwares70-dev-ed.develop.lightning.force.com/lightning/r/LW_InApp_BacklogList?c__prioritizationCycle=June%202025	Start Date
Created By Pritam Narkhede, 18/09/2024, 5:41 pm	End Date