



User Guide

Salesforce App Exchange Product
Journey Details Viewer

December 03, 2023

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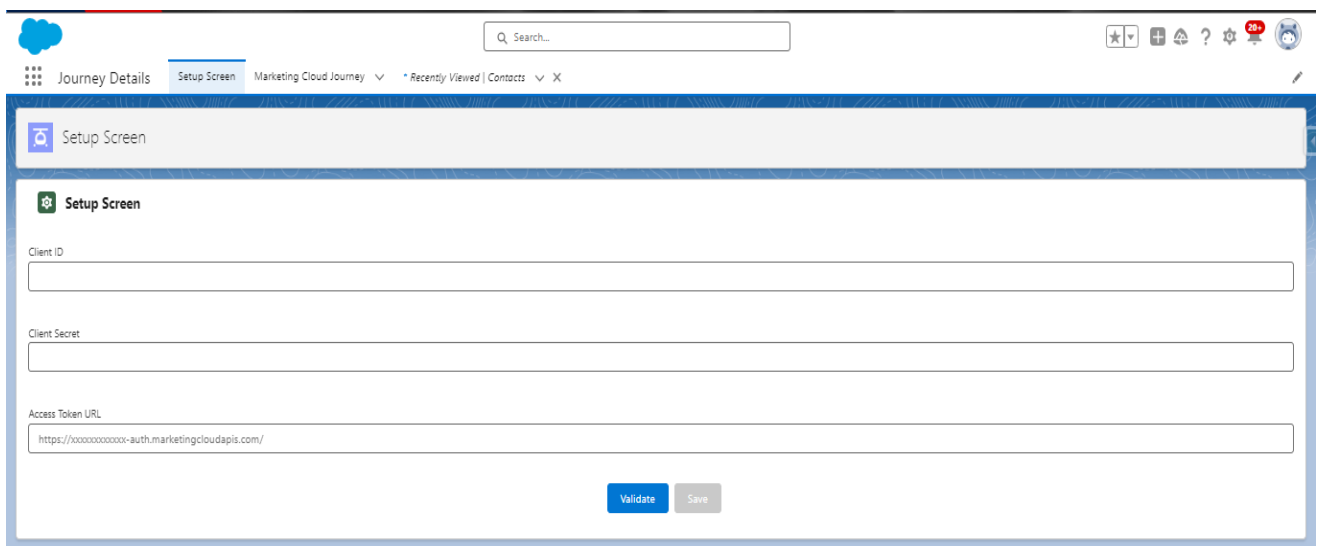
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Journey Details Viewer – User Guide

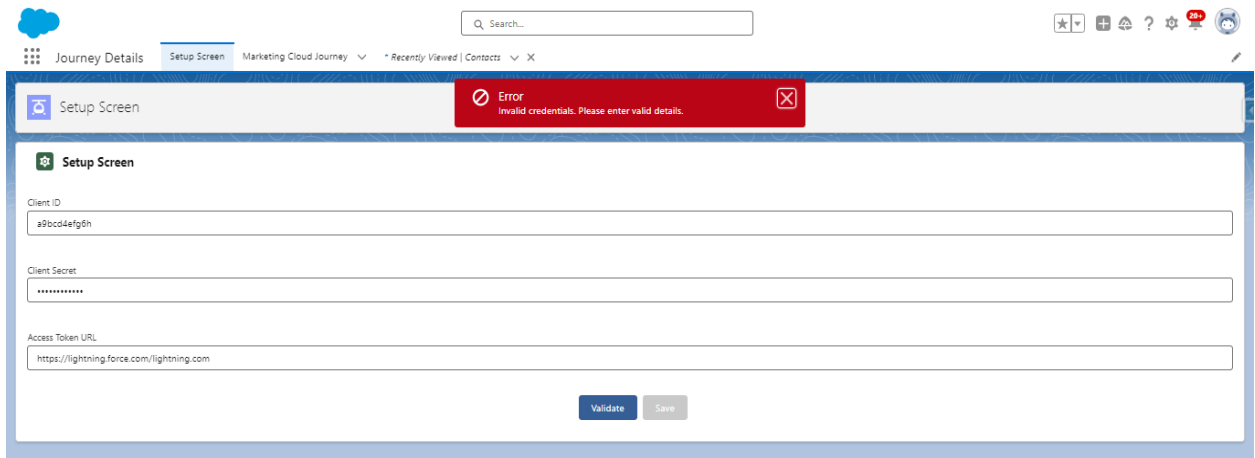
1. Authorization Setup Screen

When user login for the first time, they will see this Setup page where they can enter their credentials i.e., Client Id, Client Secret, Access Token URL and then should click on '**Validate**' button to validate the credentials.



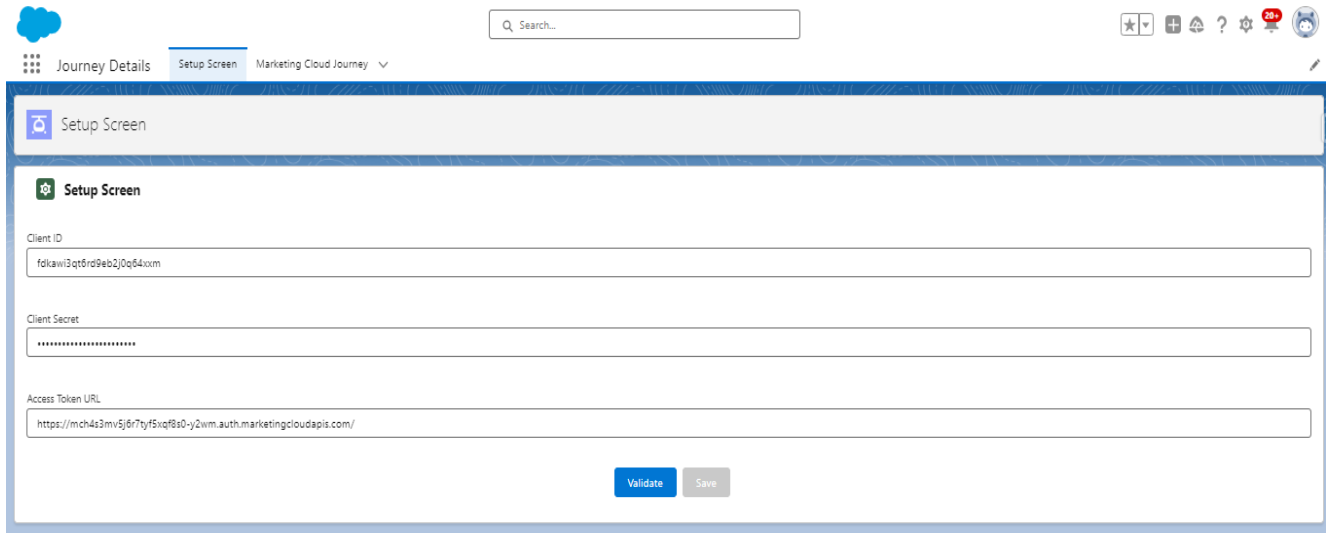
The screenshot shows the 'Setup Screen' in the Journey Details Viewer. The interface includes a top navigation bar with a search bar and several icons. Below the navigation bar, there are tabs for 'Journey Details', 'Setup Screen', 'Marketing Cloud Journey', 'Recently Viewed', 'Contacts', and 'X'. The 'Setup Screen' tab is active. The main content area is titled 'Setup Screen' and contains three input fields: 'Client ID', 'Client Secret', and 'Access Token URL'. The 'Access Token URL' field has a pre-filled value: 'https://xxxxxxxxxxxx-auth.marketingcloudapis.com/'. At the bottom of the form, there are two buttons: 'Validate' (in blue) and 'Save' (in grey).

Let's say if any user enters a wrong credential, they will get an error instantly from the system saying '**Invalid Credentials**' after clicking on '**Validate**' button.



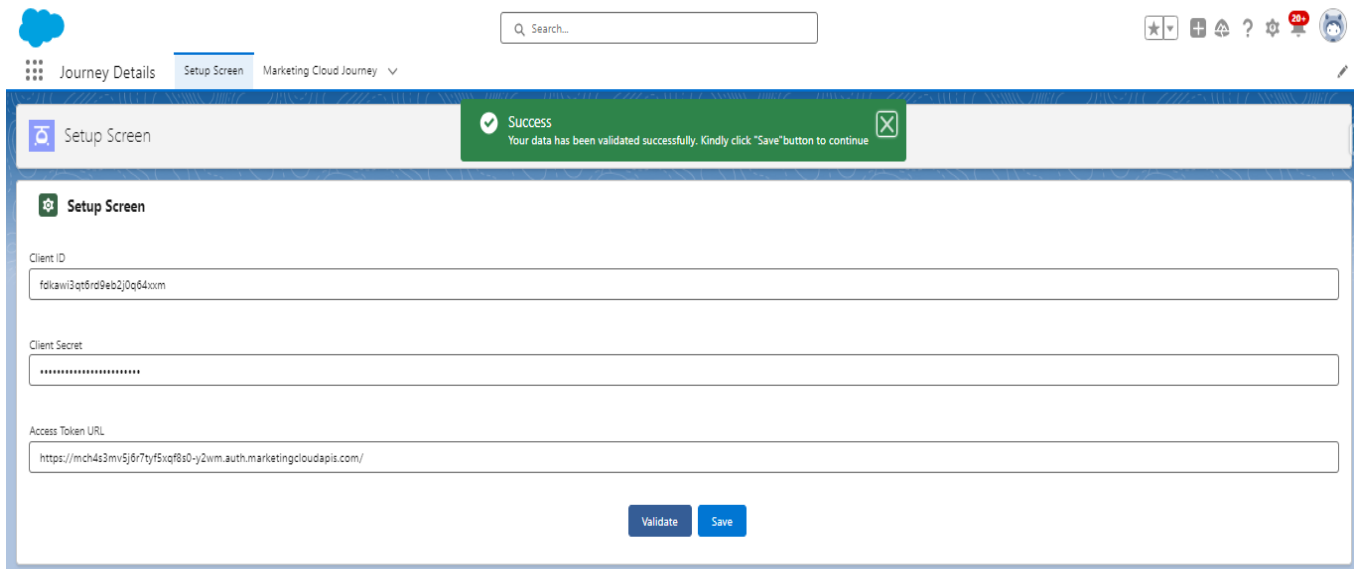
The screenshot shows the 'Setup Screen' after an invalid credential entry. A red error banner at the top of the form area displays the message: 'Error Invalid credentials. Please enter valid details.' with a close button (X). The input fields are now populated with test data: 'Client ID' is 'a9bccc4efg5h', 'Client Secret' is '*****', and 'Access Token URL' is 'https://lightning.force.com/lightning.com'. The 'Validate' and 'Save' buttons remain at the bottom.

So, it is mandatory to enter a valid credentials for **successful integration with the system.**



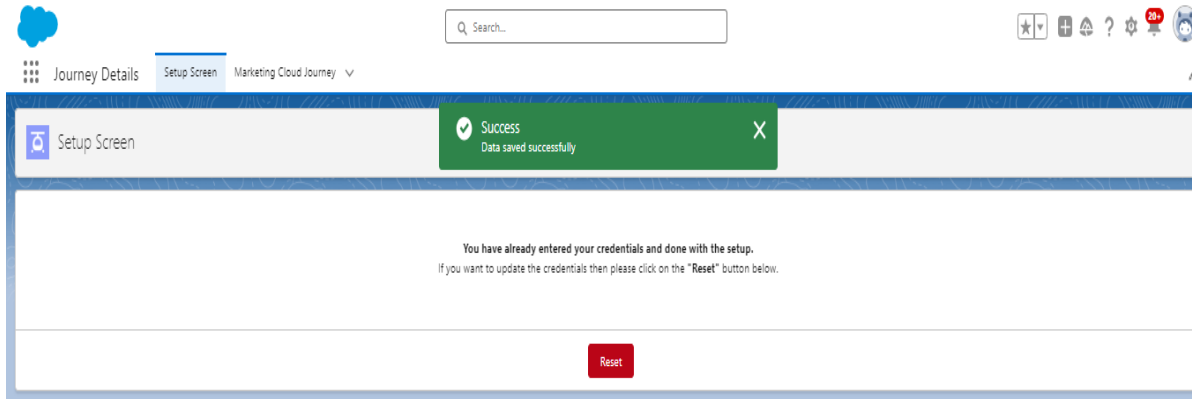
The screenshot shows the 'Setup Screen' in the Journey Details Viewer. The interface includes a search bar at the top right and a navigation menu on the left. The main content area contains three input fields: 'Client ID' with the value 'fdkawi3qt6rd9eb2j0q64xxm', 'Client Secret' which is masked with dots, and 'Access Token URL' with the value 'https://mch4s3mv5j6r7tyf5xqf8s0-y2wm.auth.marketingcloudapis.com/'. Below these fields are two buttons: 'Validate' (highlighted in blue) and 'Save' (disabled).

After entering a valid credentials, on clicking on Validate button, a message will get displayed saying 'your data has been validated'. Now **“Save”** button is enabled to save the details in custom settings.

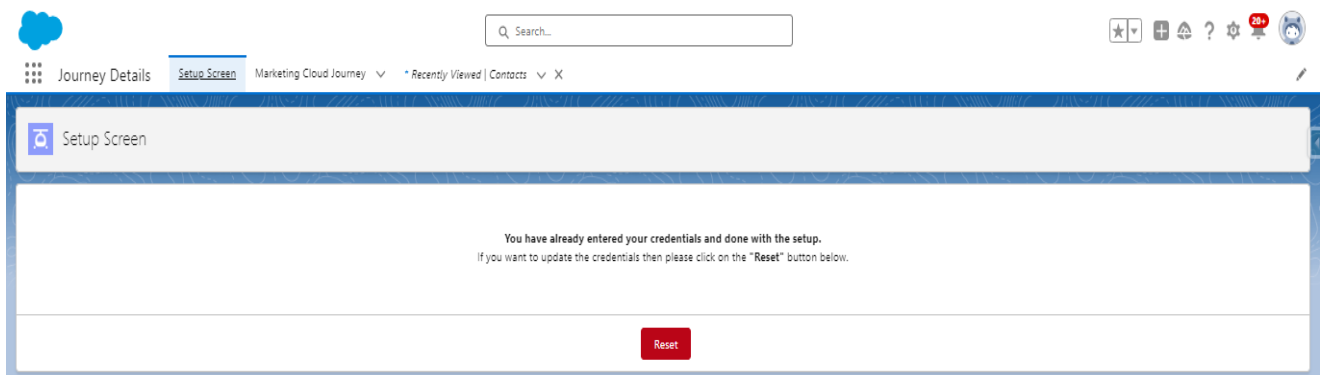


The screenshot shows the 'Setup Screen' after a successful validation. A green success message is displayed at the top: 'Success Your data has been validated successfully. Kindly click "Save" button to continue'. The 'Save' button is now enabled and highlighted in blue. The input fields and the 'Validate' button remain the same as in the previous screenshot.

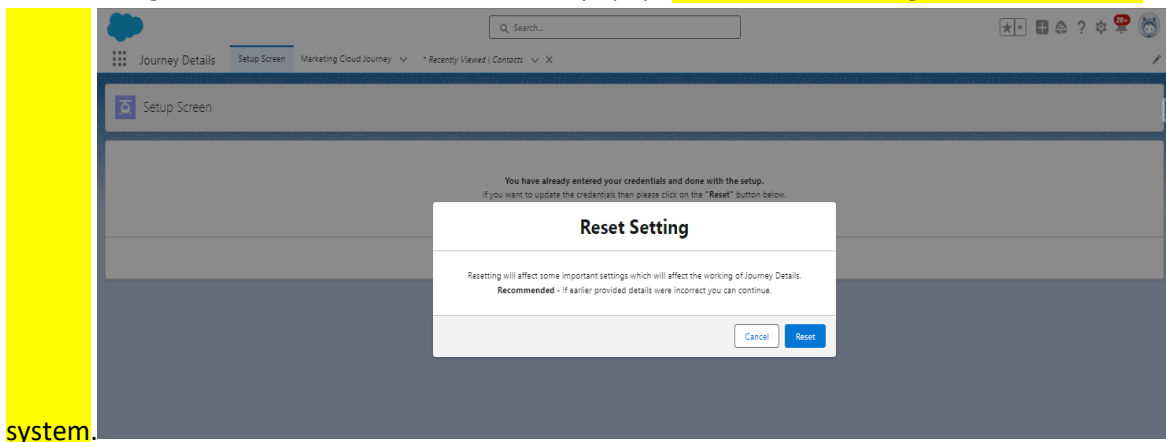
After clicking on **“Save”** button, the data will get save on custom settings and a Success message will get displayed.



Now user can't see the setup screen as the credentials has already been entered, if they wish to change the credentials, they must click on the below **'Reset'** button to erase and set the whole data.

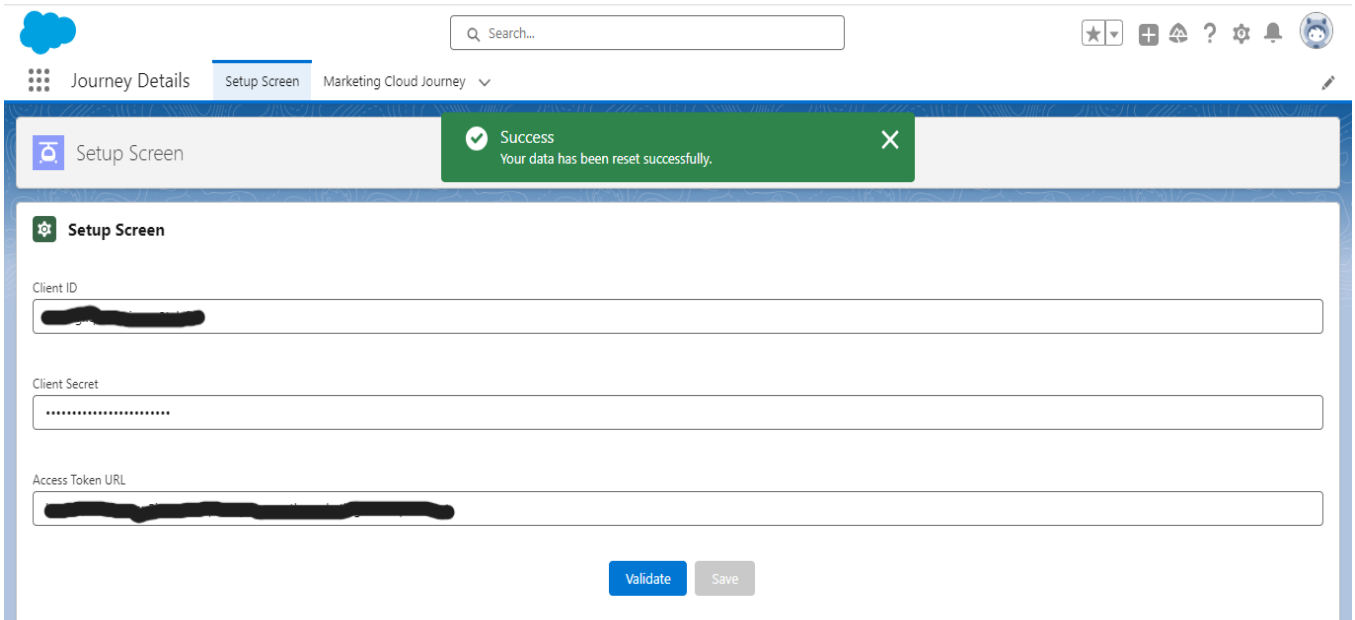


After clicking on **'Reset'** button on confirmation popup, the whole data will get erased from the



system.

Now, the Setup screen is visible again to enter the new or updated credentials.



Setup Screen

Success
Your data has been reset successfully.

Client ID

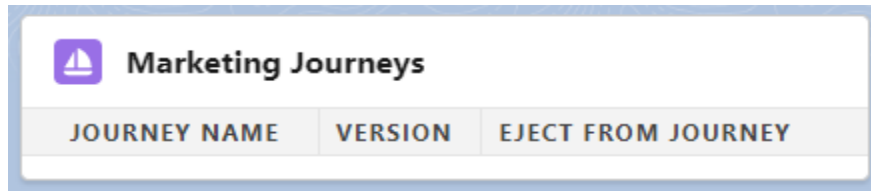
Client Secret

Access Token URL

Validate Save

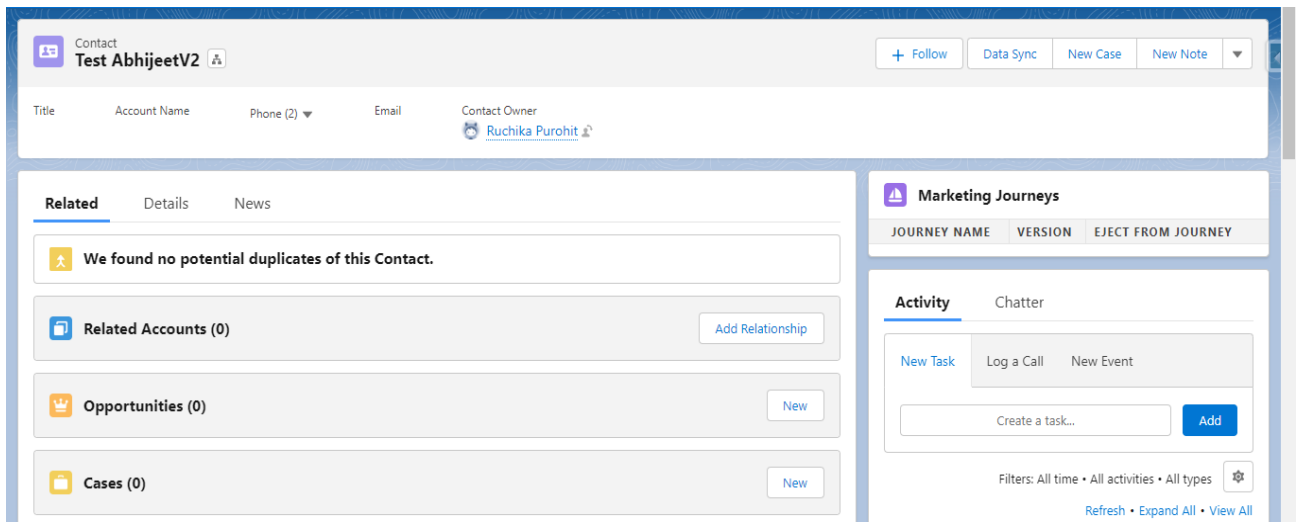
2. Marketing Journeys Component:

1. This is the User Interface of the component.



JOURNEY NAME	VERSION	EJECT FROM JOURNEY
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2. This is how it looks when a contact is not part of the journey the component appears empty.



The screenshot displays the 'Journey Details Viewer' interface for a contact named 'Test AbhijeetV2'. The interface is divided into several sections:

- Contact Header:** Shows the contact name 'Test AbhijeetV2' with a profile icon, and buttons for '+ Follow', 'Data Sync', 'New Case', and 'New Note'.
- Contact Information:** A table with columns: Title, Account Name, Phone (2), Email, and Contact Owner. The 'Contact Owner' is listed as 'Ruchika Purohit'.
- Related Section:** Includes tabs for 'Related', 'Details', and 'News'. It contains a message: 'We found no potential duplicates of this Contact.' Below this are three sections: 'Related Accounts (0)' with an 'Add Relationship' button, 'Opportunities (0)' with a 'New' button, and 'Cases (0)' with a 'New' button.
- Marketing Journeys Section:** Features a table with columns: JOURNEY NAME, VERSION, and EJECT FROM JOURNEY. Below the table is an 'Activity' section with tabs for 'Activity' and 'Chatter'. The 'Activity' tab is active, showing a 'New Task' button and a 'Log a Call' button. There is a text input field 'Create a task...' and an 'Add' button. At the bottom, there are filters: 'All time', 'All activities', and 'All types', along with a settings icon. Links for 'Refresh', 'Expand All', and 'View All' are also present.

- When the contact is part of journeys the journey name along with version appears here also with an “Eject” button.

The screenshot displays the 'Journey Details Viewer' for a contact named 'test anmolyeye'. The contact's email is 'test@gmail.com' and the owner is 'Ruchika Purohit'. The 'Marketing Journeys' table lists four journeys, each with an 'Eject' button.

JOURNEY NAME	VERSION	EJECT FROM JOURNEY
Test_SFMC_SFDC_Journeys	2	Eject
Test_SFDC_SFMC2_Journey	1	Eject
Delay_Test_Journey	2	Eject
Test_LWC_Journey	1	Eject

3. Eject Button Functionality:

- On Clicking, the “Eject” button that contact will get ejected from that journey.

This screenshot shows the same interface as the previous one, but the 'Eject' button for the 'Test_SFDC_SFMC2_Journey' is highlighted with a red underline, indicating it is the focus of the functionality being described.

JOURNEY NAME	VERSION	EJECT FROM JOURNEY
Test_SFMC_SFDC_Journeys	2	Eject
Test_SFDC_SFMC2_Journey	1	<u>Eject</u>
Delay_Test_Journey	2	Eject
Test_LWC_Journey	1	Eject

- As soon as we press the button a toast message will appear telling to wait until the process is completed.

The screenshot shows the 'Contact' details for 'Test Anmol02838'. A yellow warning toast message is displayed at the top, stating: 'Warning: Request successfully accepted for this contact to exit the journey dont refresh the page'. Below the contact details, there are tabs for 'Related', 'Details', and 'News'. The 'Related' tab is active, showing sections for 'Related Accounts (0)', 'Opportunities (0)', and 'Cases (0)'. On the right, the 'Marketing Journeys' table is visible, showing three journeys: 'Test_SFMC_SFDC_Journeys', 'Test_SFDC_SFMC2_Journey', and 'Delay_Test_Journey'. The 'Activity' tab is also visible, showing 'New Task', 'Log a Call', and 'New Event'.

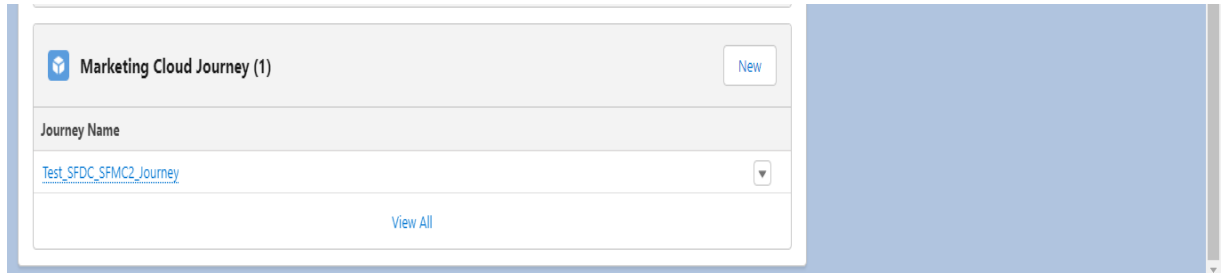
JOURNEY NAME	VERSION	EJECT FROM JOURNEY
Test_SFMC_SFDC_Journeys	1	Eject
Test_SFDC_SFMC2_Journey	1	Eject
Delay_Test_Journey	2	Eject

- After getting the contact ejected successfully from the journey, we will again get a toast message and the record of the journey will automatically get deleted from the table.

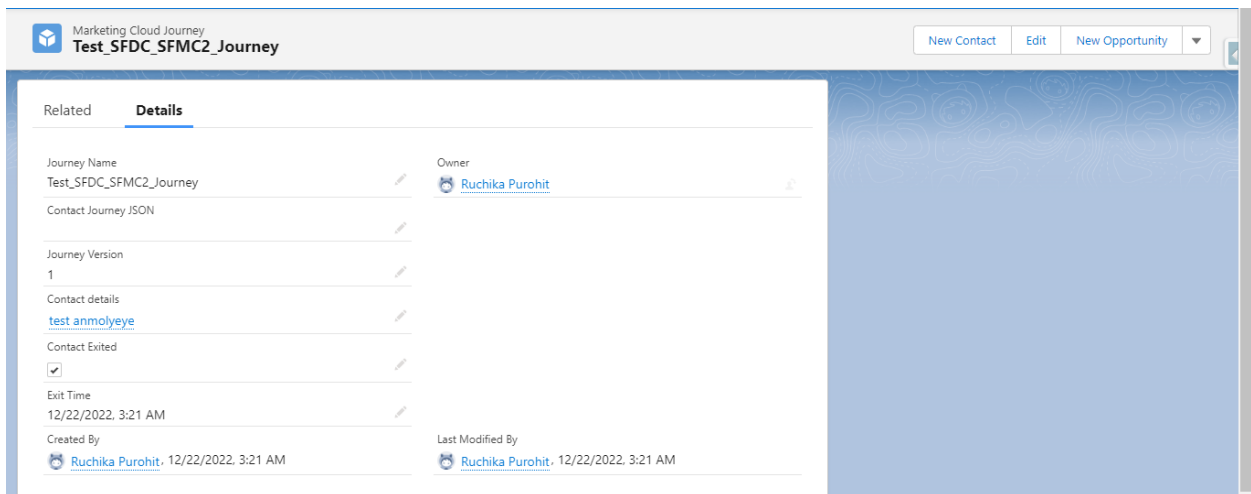
The screenshot shows the 'Contact' details for 'test anmol02838'. A green success toast message is displayed at the top, stating: 'Success: Contact successfully exited the journey'. Below the contact details, there are tabs for 'Related', 'Details', and 'News'. The 'Related' tab is active, showing sections for 'Related Accounts (0)', 'Opportunities (0)', and 'Cases (0)'. On the right, the 'Marketing Journeys' table is visible, showing three journeys: 'Test_SFMC_SFDC_Journeys', 'Delay_Test_Journey', and 'Test_LWC_Journey'. The 'Activity' tab is also visible, showing 'New Task', 'Log a Call', and 'New Event'.

JOURNEY NAME	VERSION	EJECT FROM JOURNEY
Test_SFMC_SFDC_Journeys	2	Eject
Delay_Test_Journey	2	Eject
Test_LWC_Journey	1	Eject

4. Along with this a record of the contacts journey data will get created on a custom object with name marketing cloud journey.

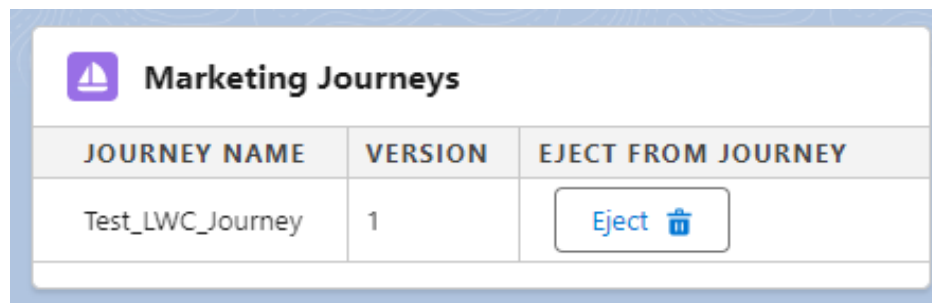


5. This is the record:

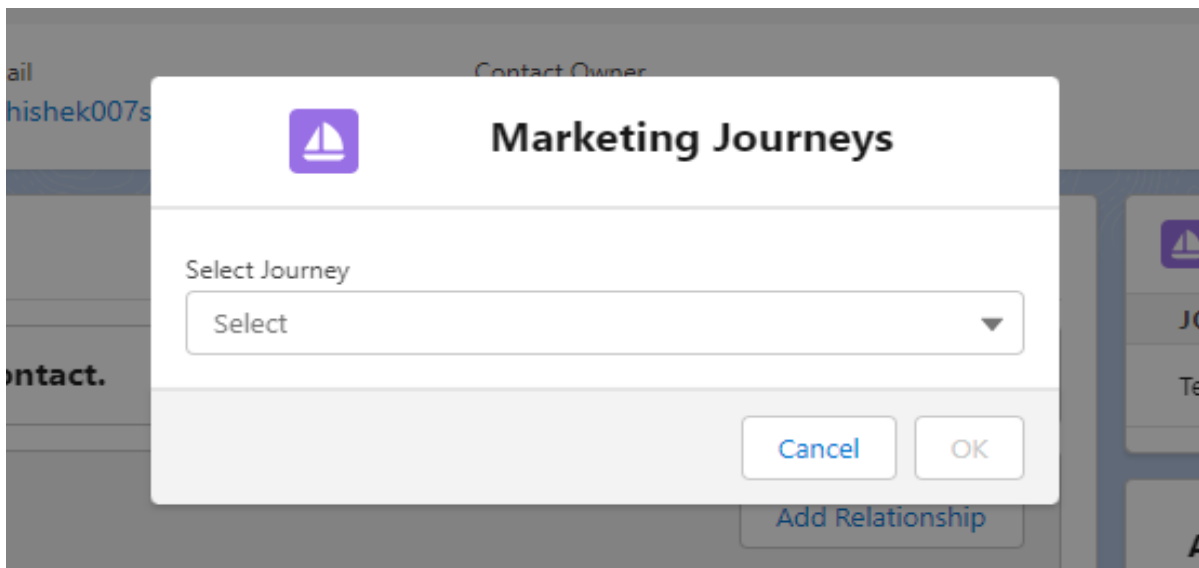


4. MC Journey Viewer on Sales Component:

- We can make that contact exit the Journey at any moment on clicking the Eject button.



- The second Component is used to gather information regarding the condition on which a contact can enter a Salesforce Data based journey.
- There is also a custom object which generates a custom record whenever a contact exits the journey, with details regarding the journey and the exit time also.



The required criterion on selecting the journey is mentioned below.

