Installation Guide

In-App Ideas

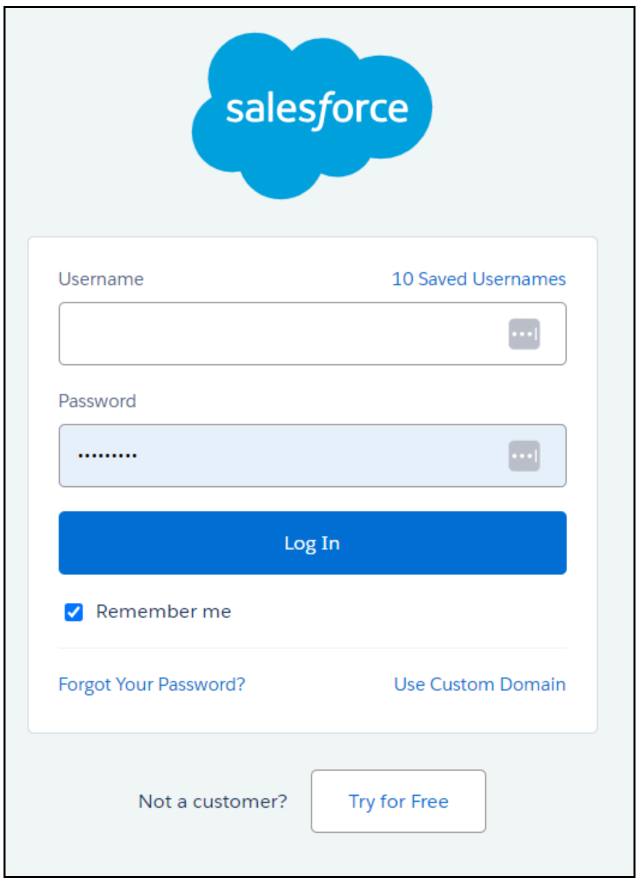
LAKEWORTH

Aug, 2025

Step 1: Access the Installation Link

Click the installation link provided by the package provider. You will be redirected to the Salesforce login page if not already logged in.

Install URL: https://login.salesforce.com/packaging/installPackage.apexp?p0=04tdM0000004vm5 (remove this?)



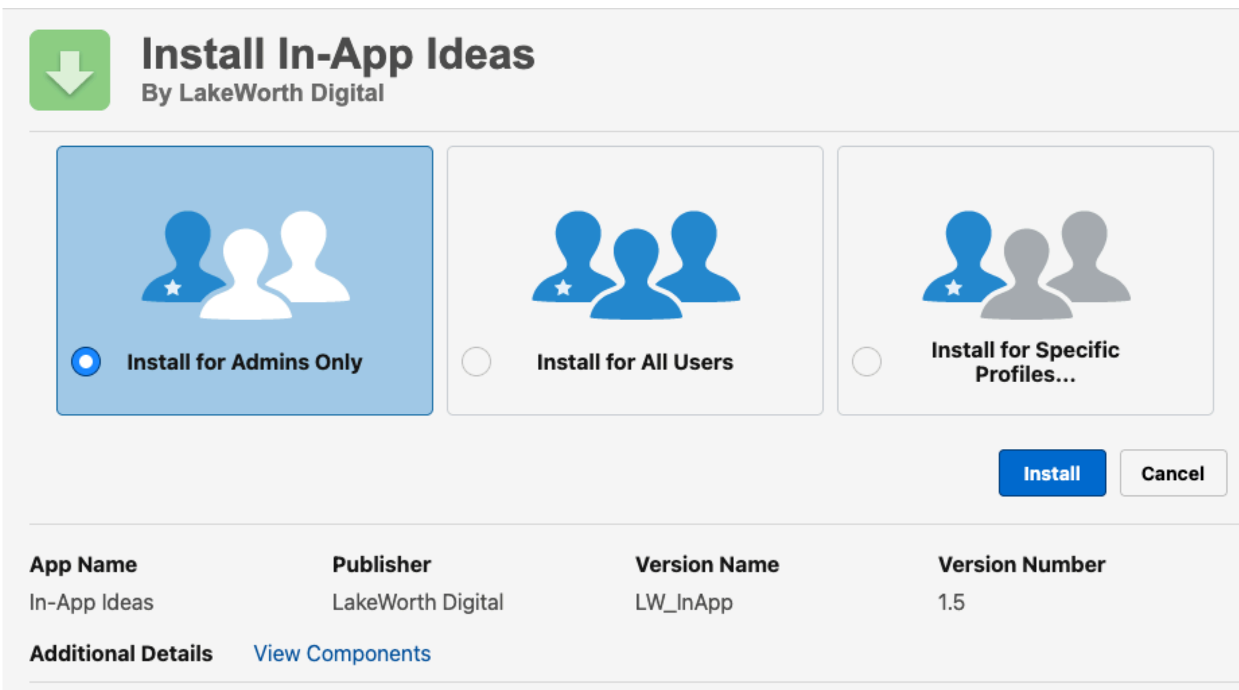
Step 2: Log in to Salesforce

Log in using your Salesforce credentials. Ensure you are in the correct environment (Production or Sandbox).

Step 3: Choose Security Settings

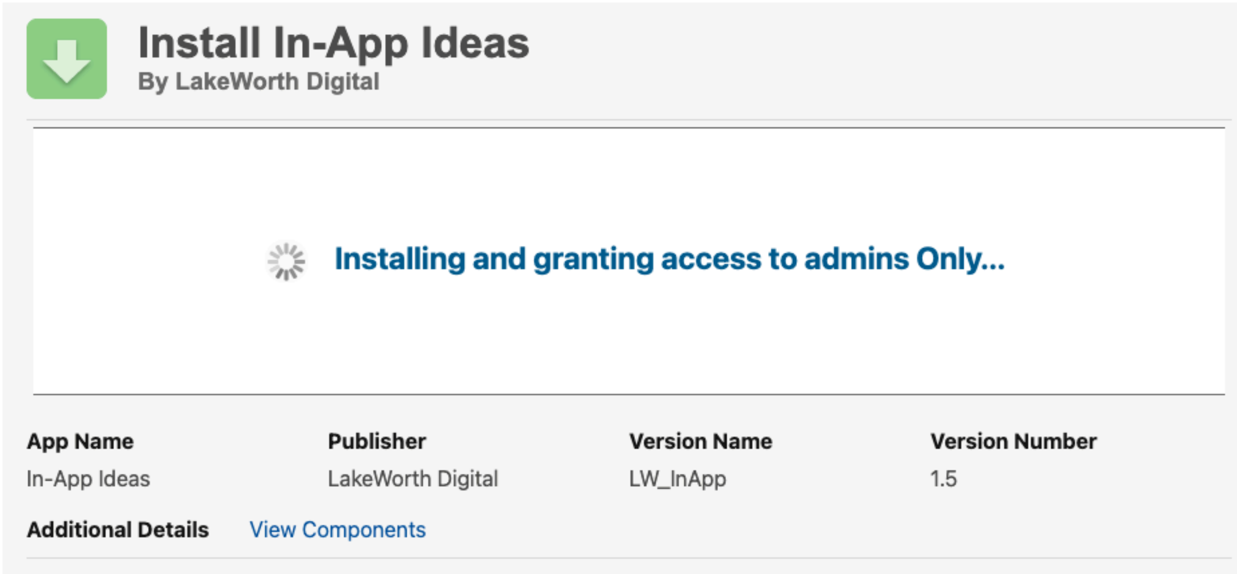
1. You'll need to select the level of access you want to grant to users for the package:
   - Install for Admins Only
   - Install for All Users
   - Install for Specific Profiles

2. Choose "**Install for Admins Only**" and Install.

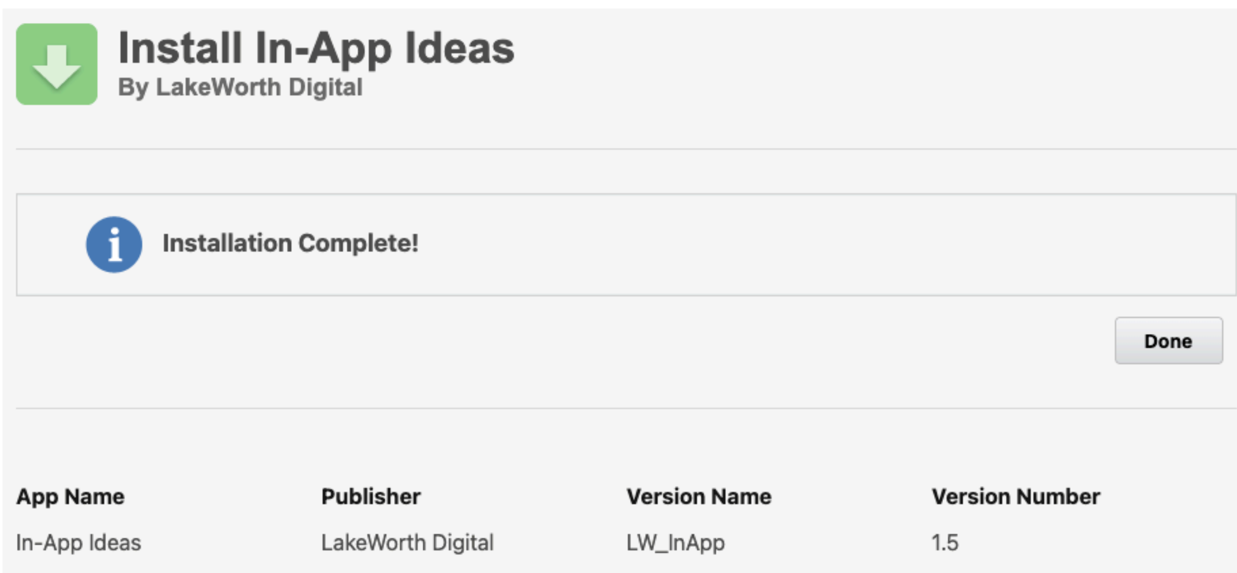


Step 4: Install the Package

1. The installation may take a few minutes.



2. Once complete, a success message will appear.



Step 5: Post-Installation Tasks

After installation, perform the following tasks:

- Assign Permissions
- Enable Path Setting

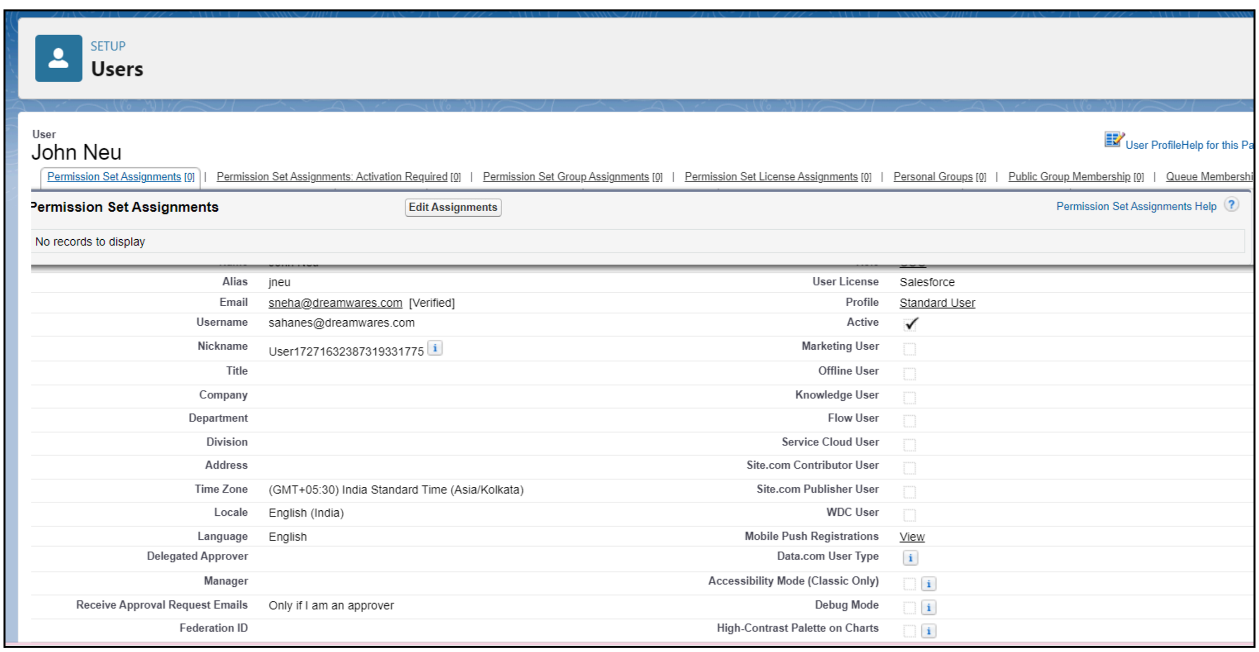
- Add ‘Submit Ideas’ as a button on utility bar
- Share Reports with Users

Assign Permissions :

Follow these steps to assign user or admin permissions:

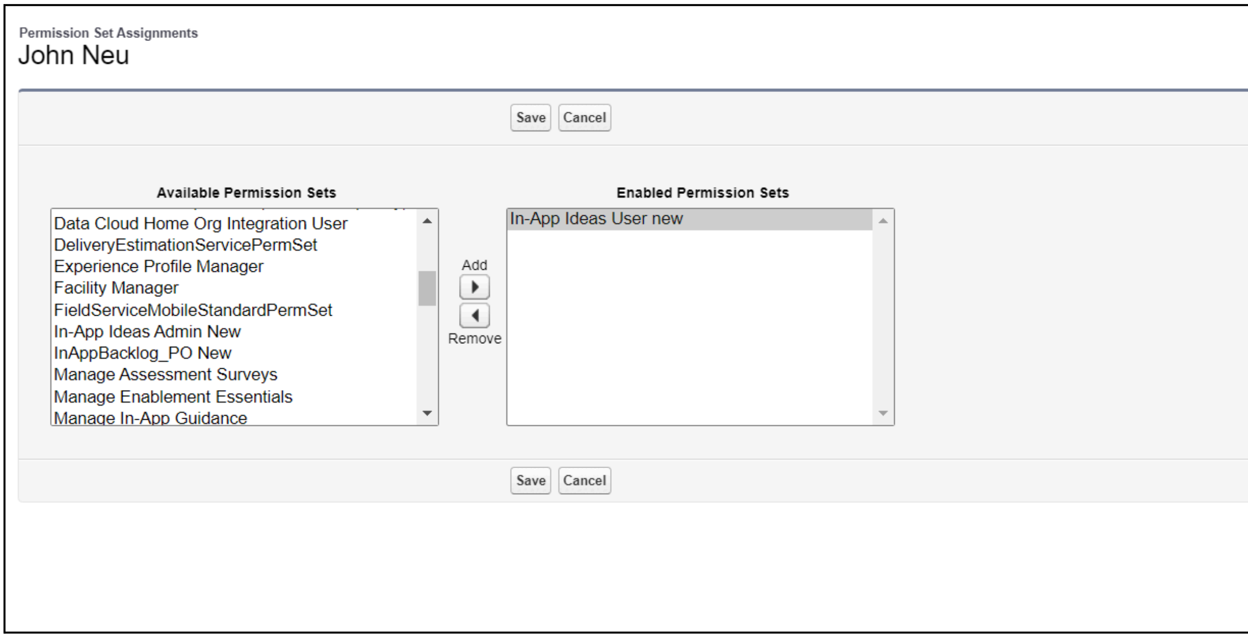
1. **Go to Setup**:
   - Click the gear icon (⚙️) in the top-right corner.
   - Select **Setup** from the dropdown.

2. **Navigate to Users**:
   - In the Quick Find box, type **Users** and select it.
   - Find and click on the user to whom you want to assign permissions.

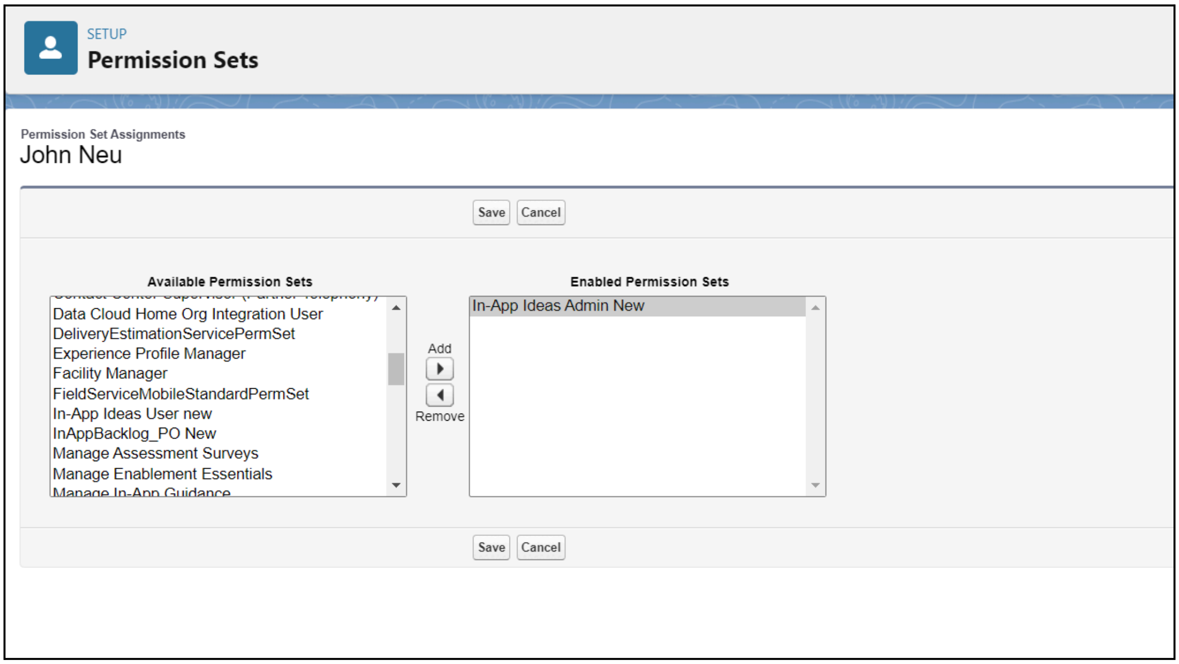


3. **Assign Permissions**:
   - **For End User Permissions**:
     1. Scroll down to the **Permission Set Assignments** section.
     2. Click **Edit Assignments**.

3. From the list, select the **User Permission Set** i.e **'In-App Ideas User New'** associated with the installed package.
4. Click **Save**.



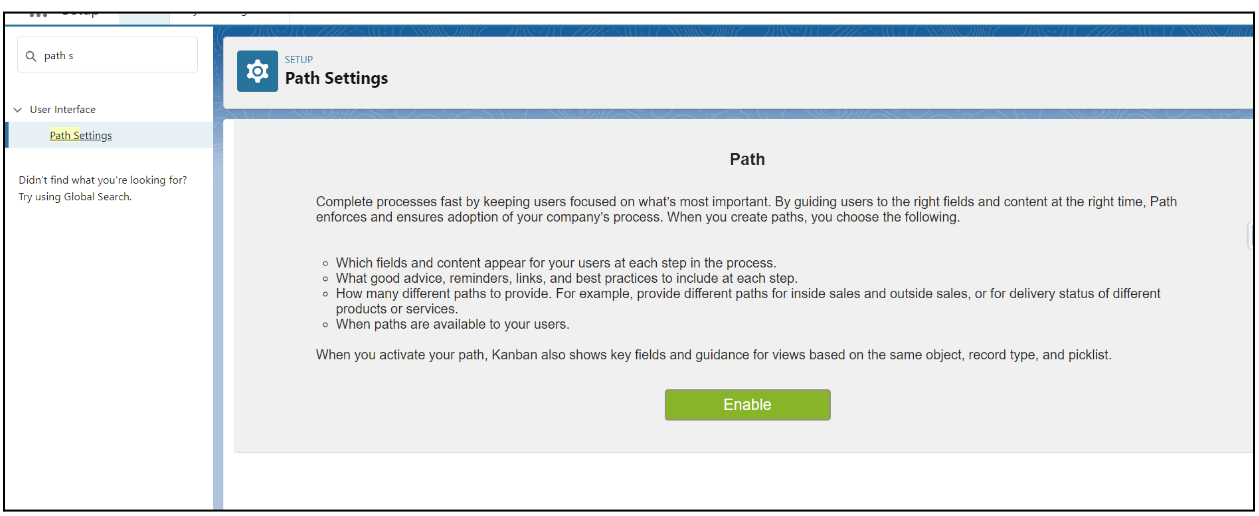
- **For Admin User Permissions**:
  1. Find and click on the admin user to whom you want to assign permissions.
  2. Scroll down to the **Permission Set Assignments** section.
  3. Click **Edit Assignments**.
  4. From the list, select the **Admin Permission Set** '**In-App Ideas Admin New**' associated with the package.
  5. Click **Save**.

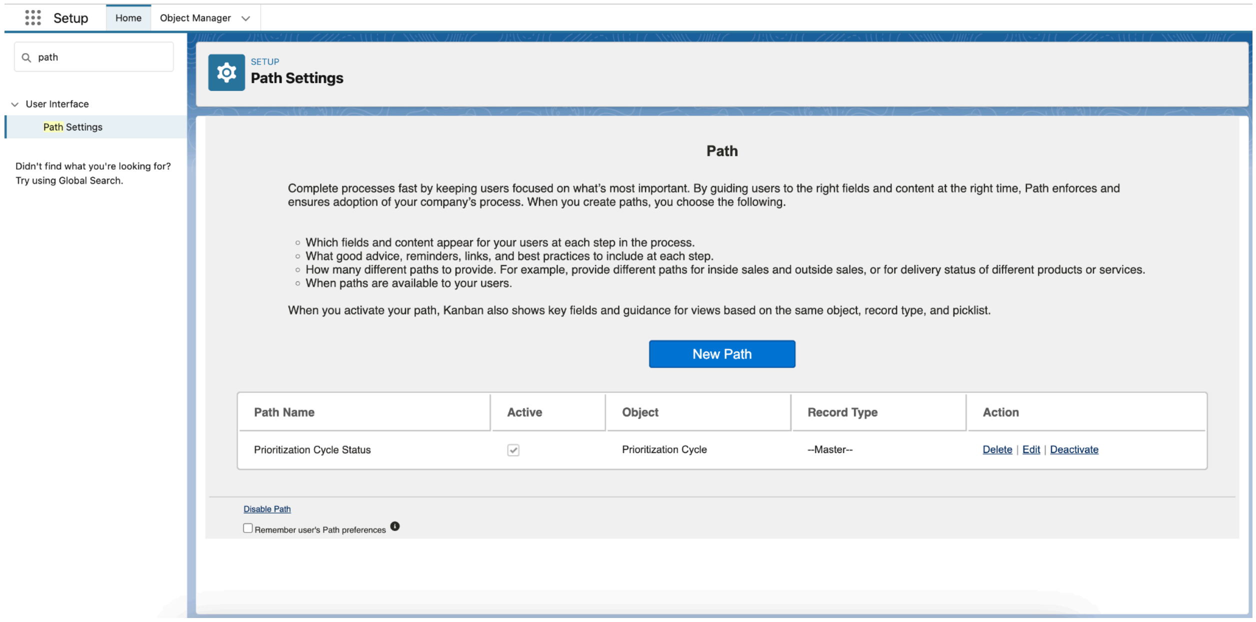


Note: Permission Set can be assigned to Profile as against assigning it to Users one by one.

Path Setting:

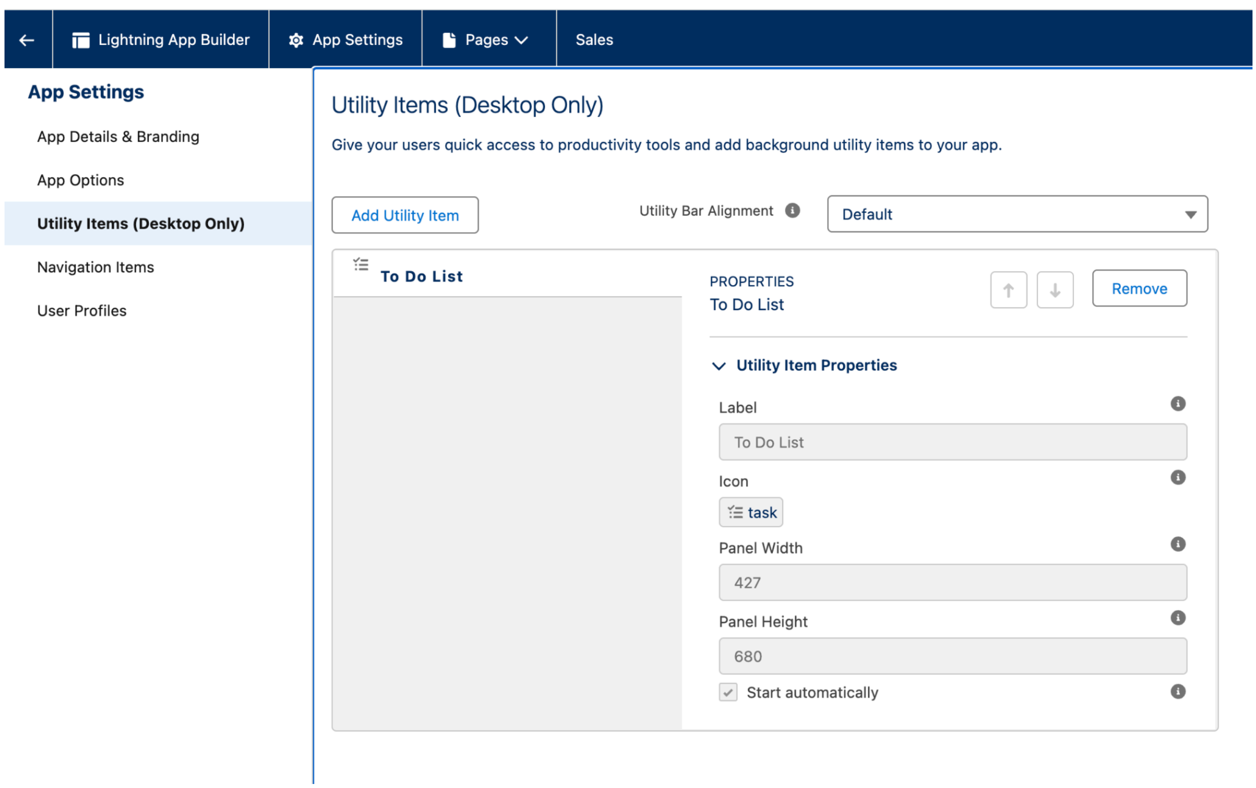
Enable Path setting from setup like shown in the screenshot below if it is not enabled already. This is used for Prioritization Cycle Status.

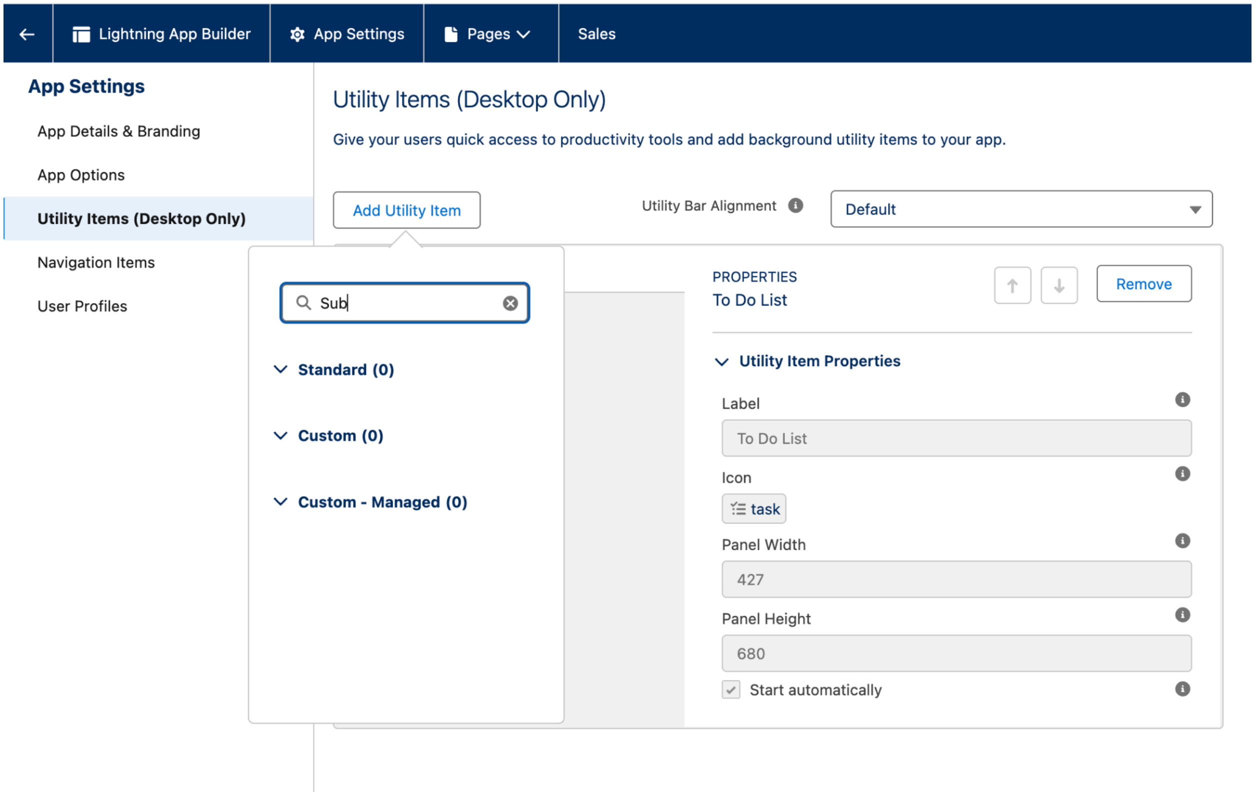




Button on Utility Bar:

Add 'Submit Ideas' as a button on the utility bar in the Apps your users use.





Note: this button is already added to the 'In-App Ideas' app by default.

Share Report with users :

In the Reports tab (navigate to this from app launcher), click **All Folders** in the left-hand navigation panel to view all available report folders.

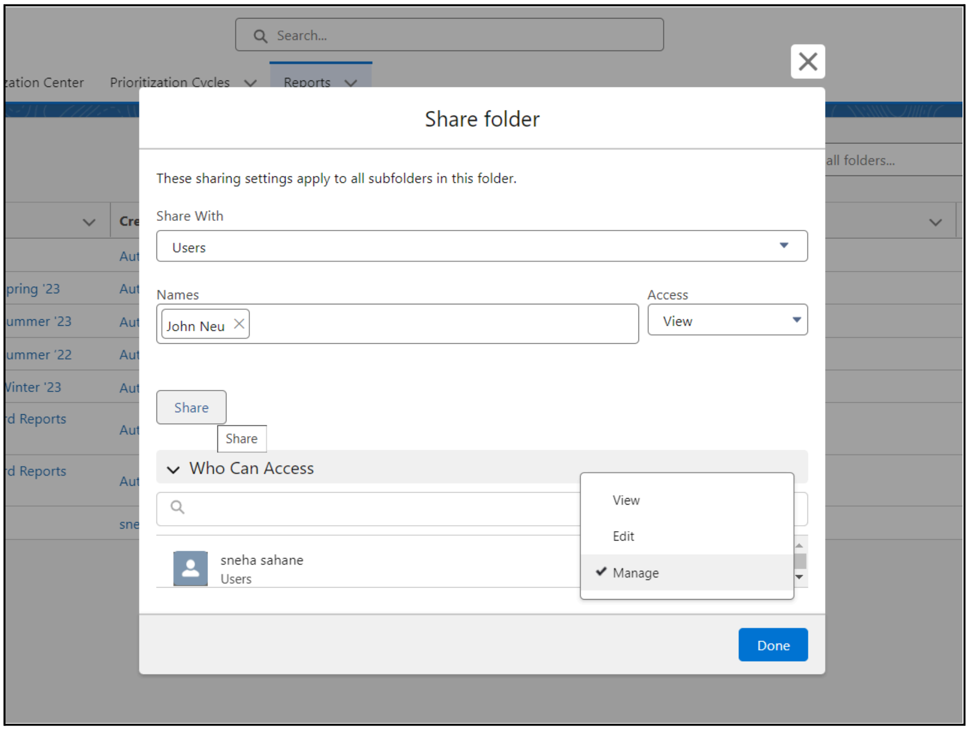
1. **Locate 'In App Ideas Reports' folder**

2. **Share the Folder**
   Click the down arrow (▼) next to the folder name and select **Share**.

3. **Select Users**
   In the sharing settings, search for the user(s) you want to share the folder with.

4. **Set Access Level**
   Choose the appropriate access level: **Viewer**, **Editor**, or **Manager**.

5. **Save Changes**
   Once you've added the user(s) and set the access level, click **Save** to apply the changes.


Search...
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Prioritization Cycles
Reports
all folders...
Share folder
These sharing settings apply to all subfolders in this folder.
Share With
Users
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View
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Manage
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