

Installation Guide

In-App Ideas

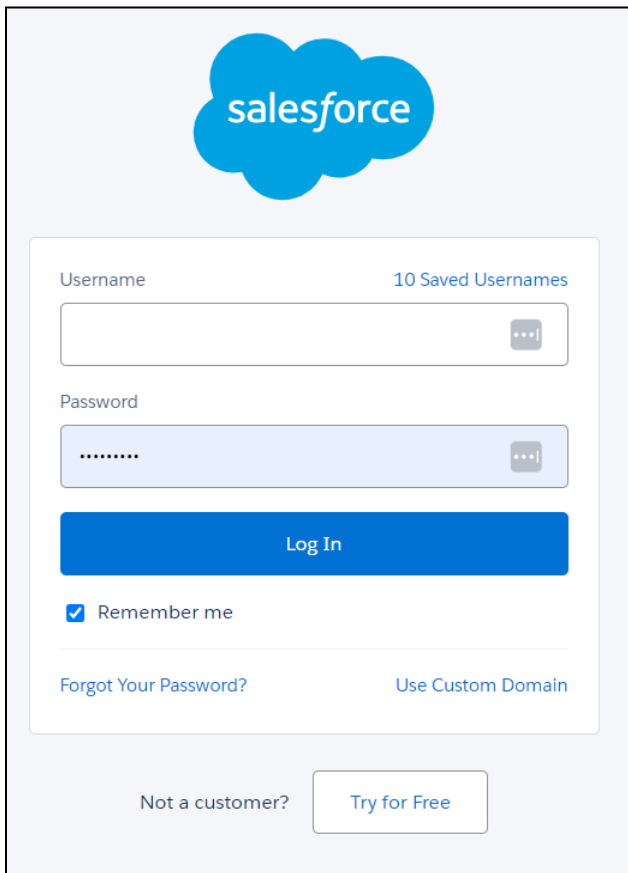


Aug, 2025

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/package/installPackage.apexp?p0=04tdM0000004vm5>
(remove this?)

The image shows the Salesforce login interface. At the top is the Salesforce logo, a blue cloud with the word "salesforce" in white. Below the logo is a white login box. Inside the box, there is a "Username" label and a link "10 Saved Usernames" to its right. Below the label is a text input field with a small "..." icon on the right. Below the input field is a "Password" label and another text input field with a small "..." icon on the right. Below the password field is a blue "Log In" button. Below the button is a "Remember me" checkbox, which is checked. At the bottom of the login box are two links: "Forgot Your Password?" and "Use Custom Domain". Below the login box, outside the white box, are the links "Not a customer?" and "Try for Free".

salesforce

Username 10 Saved Usernames

Password

Log In

☒ Remember me

[Forgot Your Password?](#) [Use Custom Domain](#)

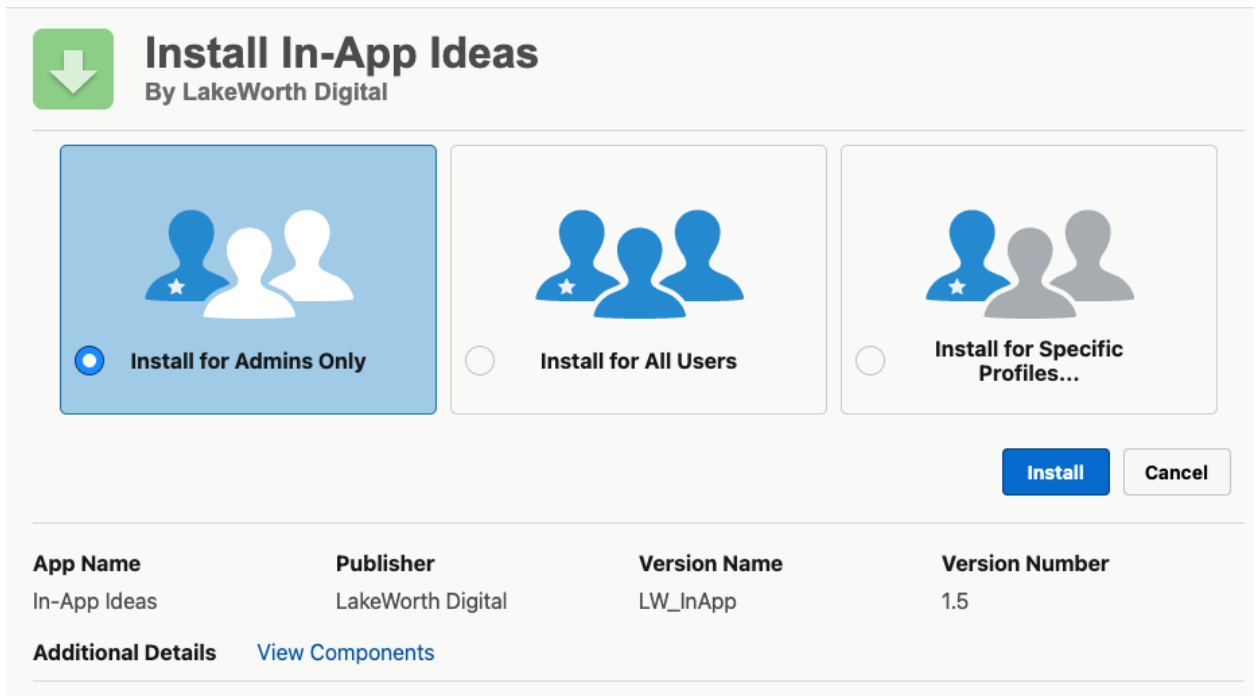
[Not a customer?](#) [Try for Free](#)

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.



Install In-App Ideas
By LakeWorth Digital

☒ Install for Admins Only

☐ Install for All Users

☐ Install for Specific Profiles...

Install **Cancel**

App Name	Publisher	Version Name	Version Number
In-App Ideas	LakeWorth Digital	LW_InApp	1.5

Additional Details [View Components](#)

Step 4: Install the Package

1. The installation may take a few minutes.



Install In-App Ideas

By LakeWorth Digital

 **Installing and granting access to admins Only...**

App Name	Publisher	Version Name	Version Number
In-App Ideas	LakeWorth Digital	LW_InApp	1.5

Additional Details [View Components](#)

- Once complete, a success message will appear.



Install In-App Ideas

By LakeWorth Digital

 **Installation Complete!**

Done

App Name	Publisher	Version Name	Version Number
In-App Ideas	LakeWorth Digital	LW_InApp	1.5

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.

The screenshot shows the Salesforce 'Users' page for a user named John Neu. The page has a header with a 'SETUP' button and a 'Users' tab. Below the header, there's a 'User' section with the name 'John Neu' and a 'User Profile' link. A navigation bar contains links for 'Permission Set Assignments', 'Permission Set Assignments: Activation Required', 'Permission Set Group Assignments', 'Permission Set License Assignments', 'Personal Groups', 'Public Group Membership', and 'Queue Membership'. The main section is titled 'Permission Set Assignments' and includes an 'Edit Assignments' button. Below this, a message states 'No records to display'. A table of user details is shown, including fields like Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, Receive Approval Request Emails, and Federation ID. To the right of the table, there's a list of permission sets with checkboxes for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', and 'High-Contrast Palette on Charts'.

Alias	jneu	User License	Salesforce
Email	sneha@dreamwares.com [Verified]	Profile	Standard User
Username	sahanes@dreamwares.com	Active	☒
Nickname	User17271632387319331775 ⓘ	Marketing User	☐
Title		Offline User	☐
Company		Knowledge User	☐
Department		Flow User	☐
Division		Service Cloud User	☐
Address		Site.com Contributor User	☐
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	☐
Locale	English (India)	WDC User	☐
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	☐ ⓘ
Receive Approval Request Emails	Only if I am an approver	Debug Mode	☐ ⓘ
Federation ID		High-Contrast Palette on Charts	☐ ⓘ

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**.

Permission Set Assignments
John Neu

Save Cancel

Available Permission Sets		Enabled Permission Sets
Data Cloud Home Org Integration User	Add ▶ Remove ◀	In-App Ideas User new
DeliveryEstimationServicePermSet		
Experience Profile Manager		
Facility Manager		
FieldServiceMobileStandardPermSet		
In-App Ideas Admin New		
InAppBacklog_PO New		
Manage Assessment Surveys		
Manage Enablement Essentials		
Manage In-App Guidance		

Save Cancel

- **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**.

The screenshot shows the 'Permission Sets' page in the Salesforce Setup menu. The page title is 'Permission Sets' with a 'SETUP' icon. Below the title, it says 'Permission Set Assignments' and 'John Neu'. There are 'Save' and 'Cancel' buttons at the top right. The main content area is divided into two columns: 'Available Permission Sets' and 'Enabled Permission Sets'. The 'Available Permission Sets' column contains a list of permission sets: 'Data Cloud Home Org Integration User', 'DeliveryEstimationServicePermSet', 'Experience Profile Manager', 'Facility Manager', 'FieldServiceMobileStandardPermSet', 'In-App Ideas User new', 'InAppBacklog_PO New', 'Manage Assessment Surveys', 'Manage Enablement Essentials', and 'Manage In-App Guidance'. The 'Enabled Permission Sets' column contains one permission set: 'In-App Ideas Admin New'. Between the two columns are 'Add' and 'Remove' buttons. At the bottom of the main content area, there are 'Save' and 'Cancel' buttons.

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.

The screenshot shows the 'Path Settings' page in the Salesforce Setup menu. The page title is 'Path Settings' with a 'SETUP' icon. The left sidebar shows a search bar with 'path s' and a list of items under 'User Interface', with 'Path Settings' selected. The main content area has a heading 'Path' and a description: 'Complete processes fast by keeping users focused on what's most important. By guiding users to the right fields and content at the right time, Path enforces and ensures adoption of your company's process. When you create paths, you choose the following.' Below the description is a list of bullet points: 'Which fields and content appear for your users at each step in the process.', 'What good advice, reminders, links, and best practices to include at each step.', 'How many different paths to provide. For example, provide different paths for inside sales and outside sales, or for delivery status of different products or services.', and 'When paths are available to your users.' At the bottom of the main content area, there is a green 'Enable' button.

Setup

Home

Object Manager

path

User Interface

Path Settings

Didn't find what you're looking for?
Try using Global Search.

SETUP

Path Settings

Path

Complete processes fast by keeping users focused on what's most important. By guiding users to the right fields and content at the right time, Path enforces and ensures adoption of your company's process. When you create paths, you choose the following.

- Which fields and content appear for your users at each step in the process.
- What good advice, reminders, links, and best practices to include at each step.
- How many different paths to provide. For example, provide different paths for inside sales and outside sales, or for delivery status of different products or services.
- When paths are available to your users.

When you activate your path, Kanban also shows key fields and guidance for views based on the same object, record type, and picklist.

New Path

Path Name	Active	Object	Record Type	Action
Prioritization Cycle Status	☒	Prioritization Cycle	--Master--	Delete Edit Deactivate

Disable Path

☐ Remember user's Path preferences ⓘ

Button on Utility Bar:

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

←

Lightning App Builder

App Settings

Pages

Sales

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Utility Items (Desktop Only)

Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item

Utility Bar Alignment ⓘ

Default

To Do List

PROPERTIES

To Do List

↑

↓

Remove

Utility Item Properties

Label ⓘ

To Do List

Icon ⓘ

task

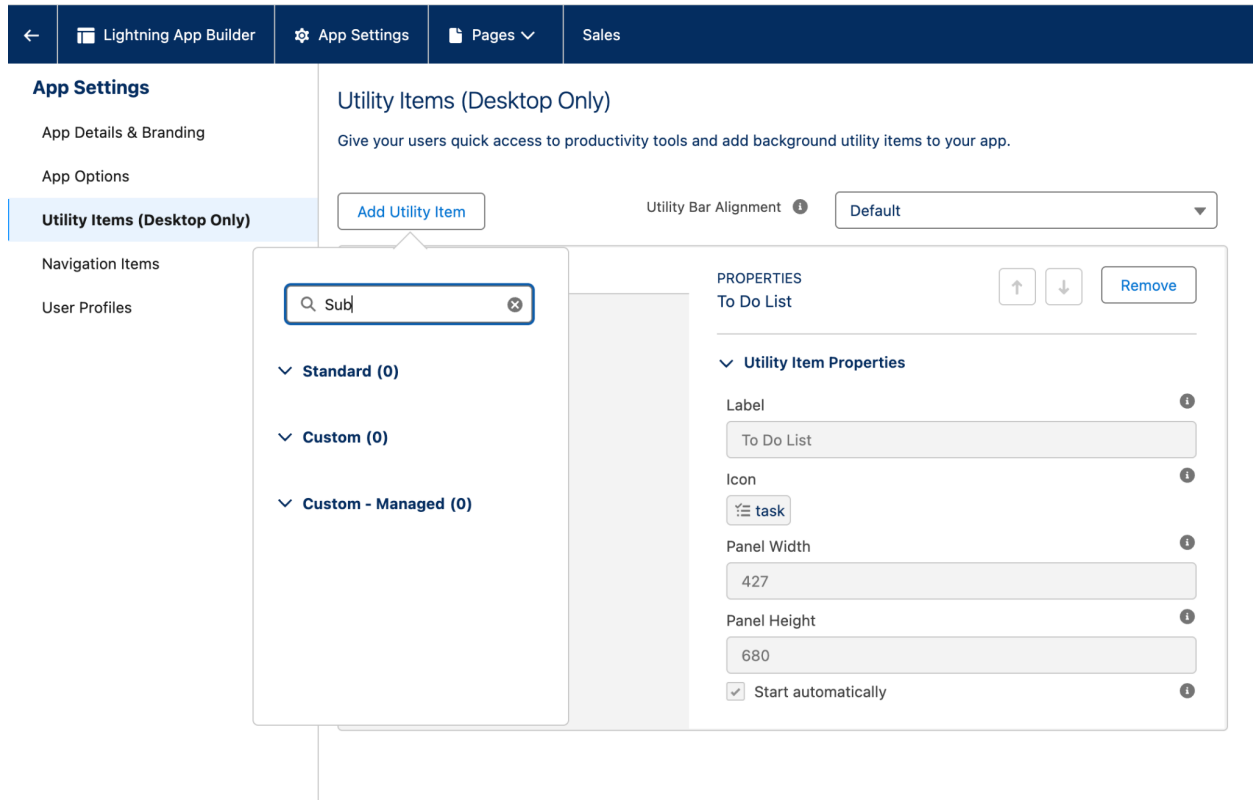
Panel Width ⓘ

427

Panel Height ⓘ

680

☒ Start automatically ⓘ



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.

