

Admin Guide

Salesforce App Exchange Product
Journey Details Viewer

December 03, 2023

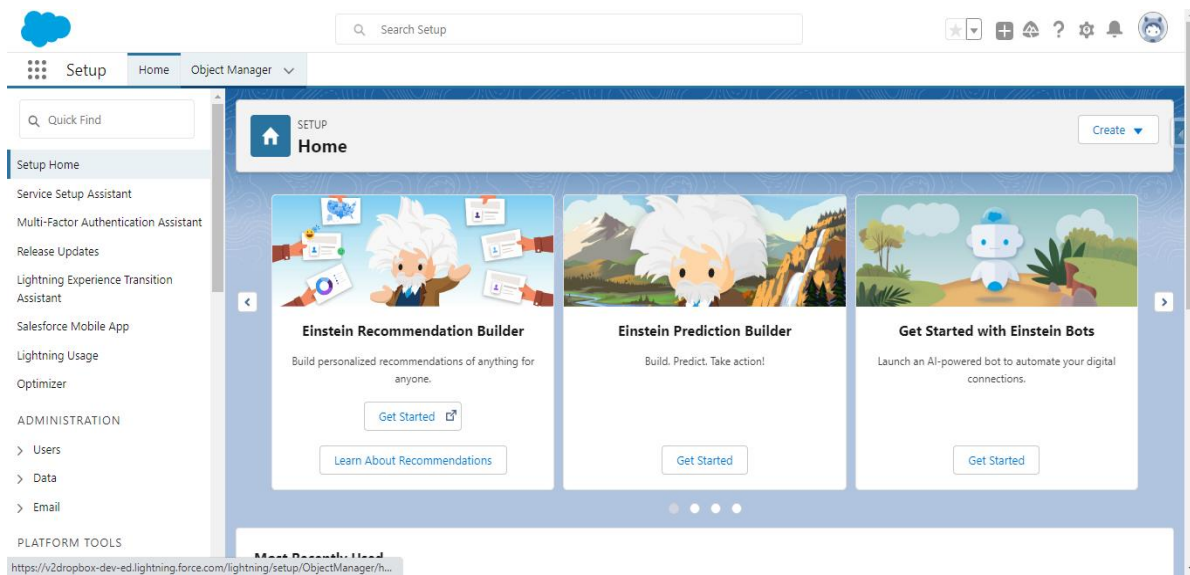
Table of Contents

1. STEPS FOR “ADDING MARKETING JOURNEY COMPONENT”	3
2. STEPS FOR ADDING “JOURNEY CRITERIA BUTTON” AND “JOURNEY NAME COMPONENT” FROM OBJECT PAGE LAYOUT.	5

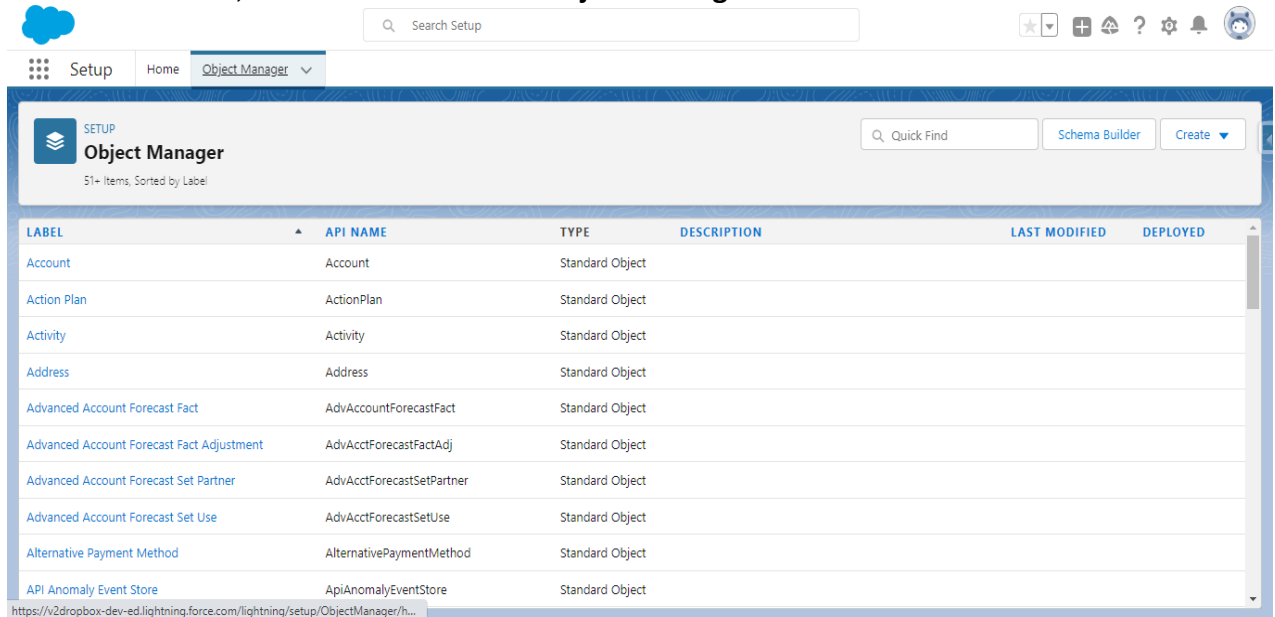
Admin Guide – Journey Details Viewer

Steps for “Adding Marketing Journey component”

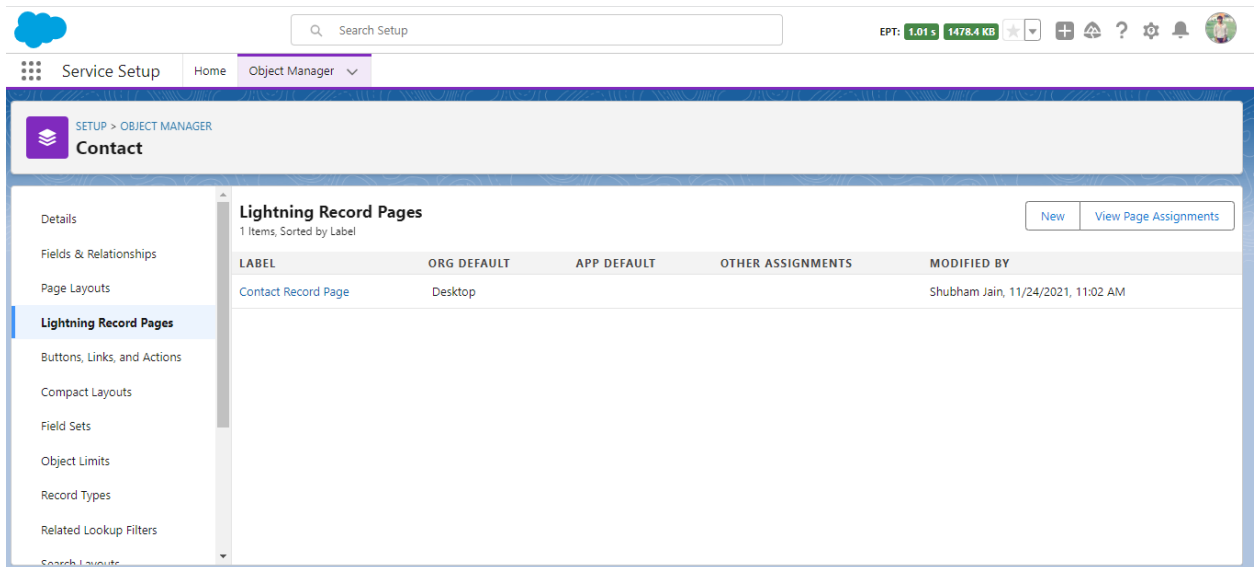
1. Navigate to the object's setup page by clicking on the gear icon in the top-right corner and selecting **"Setup"**.



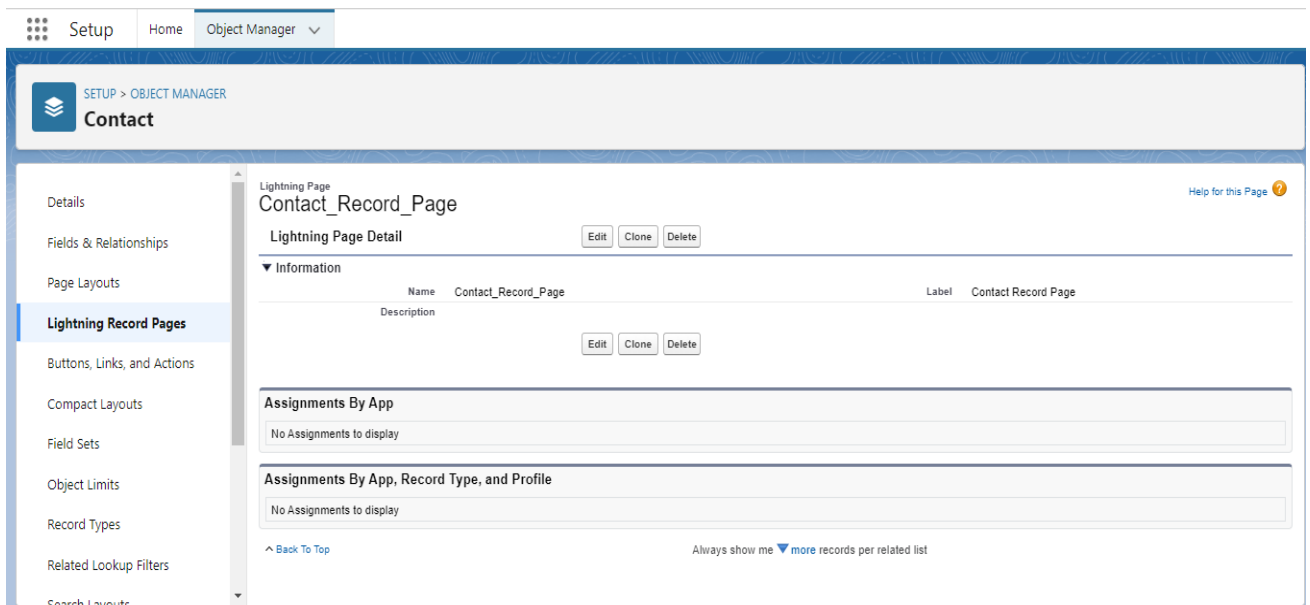
2. In the left sidebar, search for and select **"Object Manager."**



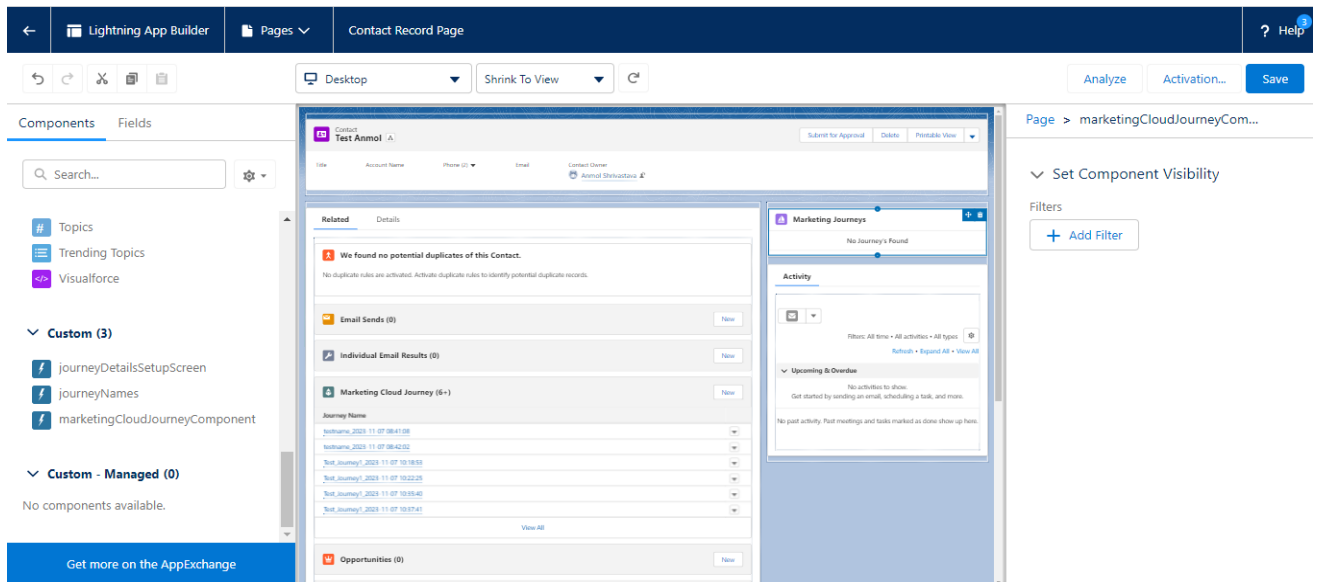
- Choose the object you want to add the Lightning component to.



- Go to the "Lightning Record Pages" section and click on the default record page for the object.



- Click **"Edit"** to modify the record page layout.

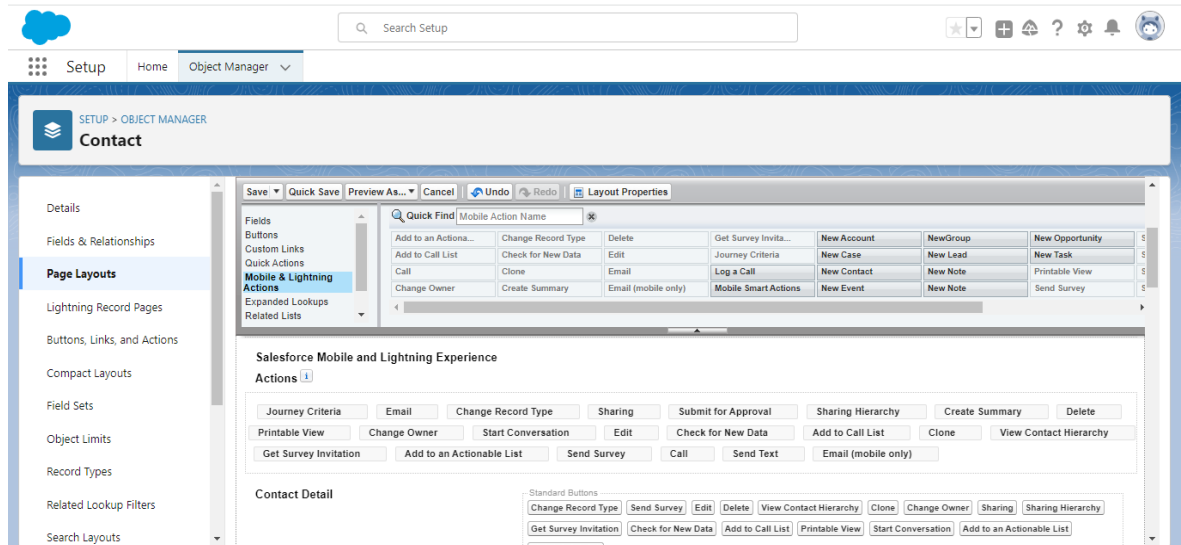


- Drag the **"marketingCloudJourneyComponent"** from the left sidebar onto the desired location on the page layout.
- Configure the component's properties as needed.
- Click **'Save'** button to save the changes.
- In the **"Lightning Record Pages"** section of the object's setup page, click on the dropdown arrow next to the record page you edited in step 4.
- Select **"Assign to App Default"** to make it the default record page for the object.
- Alternatively, you can assign the record page to specific profiles or apps based on your requirements.
- Save the changes.

Steps for Adding "Journey Criteria button" and "Journey Name component" from object page layout.

- Steps for adding Journey criteria button:

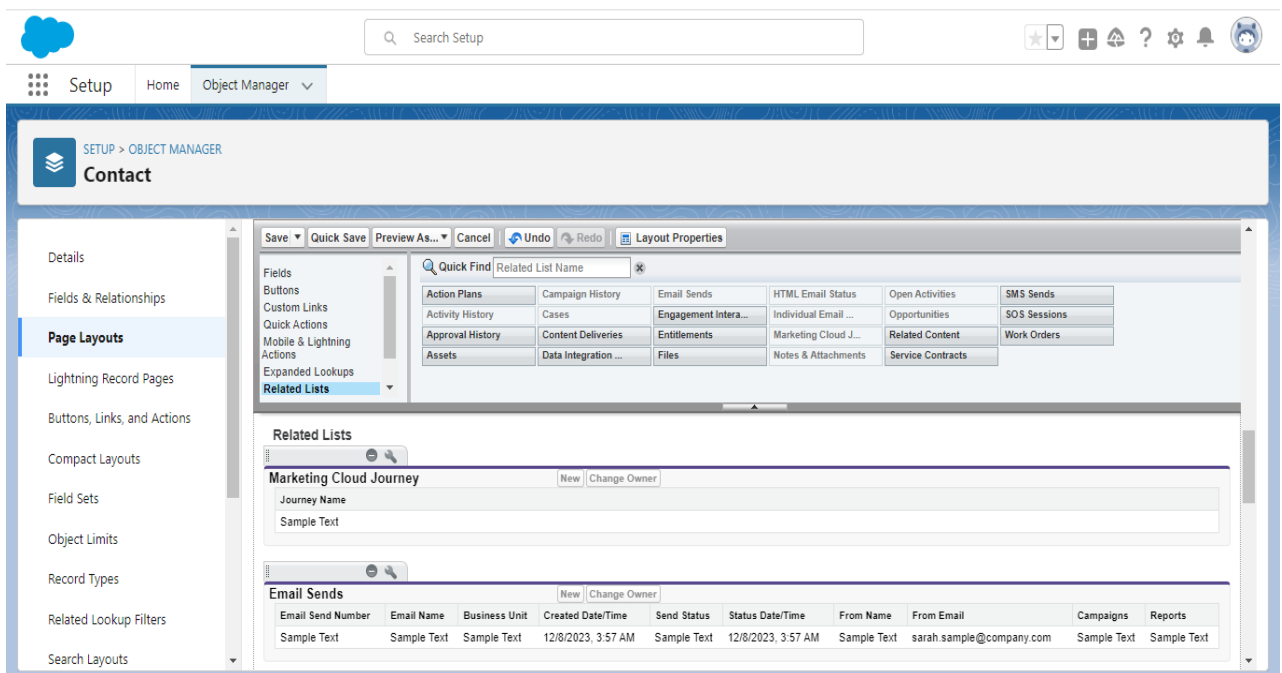
1. Click on the gear icon in the top-right corner and select "Setup."
2. In Setup, enter "Object Manager" in the Quick Find box.
3. Select "Object Manager" and then choose "Contact" from the list of objects.
4. In the Contact Object Manager, click on "Page Layouts."
5. Choose the page layout you want to edit (e.g., "Contact Layout").
6. Click on "Edit" for the selected page layout.
7. Scroll down to the "Mobile & Lightning Actions" section on the page layout editor.
8. Drag and drop the "Button" – **Journey Criteria** element from the palette into the "Mobile & Lightning Actions" section.



9. Configure the properties of the button, such as Label, Name, and Behaviour, according to your requirements.
10. Click "Save" to save your changes to the page layout.
11. Ensure that the updated page layout is assigned to the desired profiles.

- Steps for adding Journey Name Component:

1. In the Setup menu, enter "Object Manager" in the Quick Find box.
2. Select "Object Manager" and then choose "Contact."
3. In the Contact Object Manager, go to the "Page Layouts" section.
4. Select the page layout you want to edit (e.g., "Contact Layout").
5. On the page layout editor, find the "Related Lists" section.
6. Drag the "journeyNames" component to the desired location on the page layout.



The screenshot shows the V2Solutions Journey Details Viewer Admin Guide interface. The top navigation bar includes a search box labeled "Search Setup" and a dropdown menu with "Setup", "Home", and "Object Manager". The main content area is titled "SETUP > OBJECT MANAGER" and "Contact". On the left, a sidebar lists various setup options, with "Page Layouts" selected. The main panel displays the "Related Lists" section, which includes a "Quick Find" box and a list of related lists. The "Marketing Cloud Journey" related list is expanded, showing a table with columns: Email Send Number, Email Name, Business Unit, Created Date/Time, Send Status, Status Date/Time, From Name, From Email, Campaigns, and Reports. The table contains one row of sample data.

Email Send Number	Email Name	Business Unit	Created Date/Time	Send Status	Status Date/Time	From Name	From Email	Campaigns	Reports
Sample Text	Sample Text	Sample Text	12/8/2023, 3:57 AM	Sample Text	12/8/2023, 3:57 AM	Sample Text	sarah.sample@company.com	Sample Text	Sample Text

7. In the "Related List Properties" pane, choose the related list you want to display (e.g., "Activities").
8. Configure any additional settings as needed.
9. Save the changes to the page layout.