

Chatter Plug

User Guide



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- User Guide

Overview

The lightning based Salesforce plug-in brings forward a much desired enhancement of the out of the box chatter functionality provided by Salesforce ,enabling the user to effectively communicate and collaborate with other opportunity team members saving crucial seconds in a crunch situation.

Specific Business Solution :

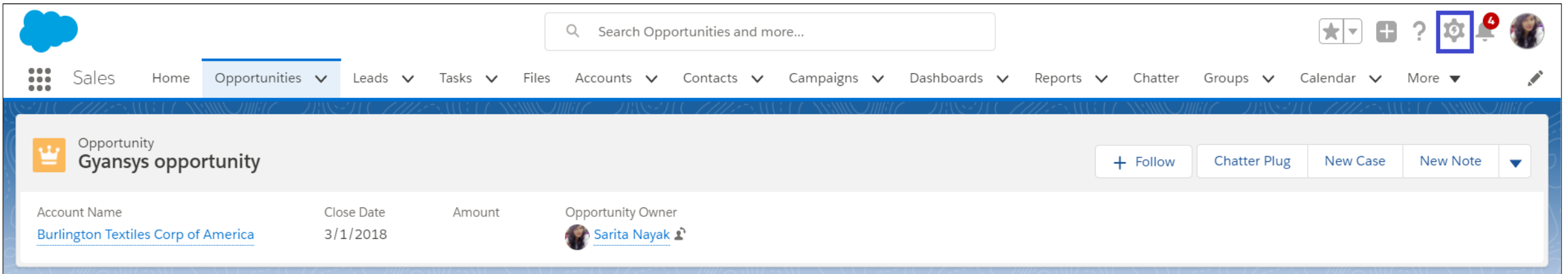
- Posts feed on Opportunity with just one click
- Mentioning specific team member and getting him notified
- Posts can be reviewed on associated Opportunity Page
- Mobile Ready Product
- Help increasing Collaborative performance
- Based on Cutting edge technology

Configuration

In Salesforce Lightning Experience (Adding the component in opportunity record detail) :

After installing the package for **All users**.

Click on the gear on the right corner of the detail page and click on **Edit Page**.



The screenshot shows the Salesforce Lightning Experience interface. At the top, there is a navigation bar with the Salesforce logo, a search bar labeled "Search Opportunities and more...", and several utility icons including a star, a plus sign, a question mark, a gear (highlighted with a blue box), a notification bell with a red "4", and a user profile picture. Below the navigation bar is a tabbed interface with tabs for Sales, Home, Opportunities (selected), Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. The main content area displays the details of an "Opportunity" record titled "Gyansys opportunity". To the right of the title are buttons for "+ Follow", "Chatter Plug", "New Case", and "New Note". Below the title, there is a table with the following data:

Account Name	Close Date	Amount	Opportunity Owner
Burlington Textiles Corp of America	3/1/2018		 Sarita Nayak

Add the two components to the desired place in opportunity detail page.

Lightning App Builder - Opportunity Record Page

←

→

✂

📄

📋

Desktop

Shrink To View

Refresh

Save

Activation...

Lightning Components

Search components...

Related List - Single

Related List Quick Links

Related Lists

Related Record

Report Chart

Rich Text

Tabs

Trending Topics

Visualforce

Custom (0)

No components available.

Custom - Managed (2)

⚡ OppTeamChatterParent

⚡ TextArea

Opportunity

Acme - 1,200 Widgets

+ Follow

Edit

New Case

New Note

Account Name

Close Date

Amount

Opportunity Owner

Acme

11/14/2015

\$140,000.00

Chatter Plug

✓

✓

✓

Value Propo...

Id. Decision ...

Perception A...

Proposal/Pri...

Negotiation...

Closed

Mark Stage as Complete

ACTIVITY

CHATTER

DETAILS

Opportunity Owner

Chatter Plug

Close Date

11/14/2015

Opportunity Name

Acme - 1,200 Widgets

Stage

Value Proposition

Account Name

Acme

Probability (%)

50%

Type

Existing Business

Amount

\$140,000.00

Primary Campaign Source

Additional Information

Lead Source

Trade Show

Next Step

Need estimate

Description

The deal is at 50% because they are at the sales process stage of evaluating our ROI justification.

Contact Roles (0)

Products (0)

Notes & Attachments (0)

Upload Files

Or drop files

Stage History (3)

Stage: Value Proposition

Amount: \$140,000.00

Probability (%): 50%

Close Date: 8/5/2013

Last Modified By: Chatter Plug

Last Modified: 1/26/2018 9:12 AM

Page > Tabs

Default Tab

Activity

Tabs

Activity

Chatter

Details

Add Tab

Set Component Visibility

Filters

Add filter

Sample screen


Opportunity
Gyansys opportunity

[+ Follow](#)
[Chatter Plug](#)
[New Case](#)
[New Note](#)

Account Name

Close Date

Amount

Opportunity Owner

[Burlington Textiles Corp of America](#)

3/1/2018


[Sarita Nayak](#)

✓

✓

✓

✓

✓

Perception An...

Proposal/Price...

Negotiation/R...

Closed

✓ Mark Stage as Complete

ACTIVITY

CHATTER

DETAILS



[Sarita Nayak](#)
 Executive Sponsor





[Nancy Harold](#)
 Lead Qualifier



The Opportunity has been closed

[Post Feed](#)
[Skip](#)


Products (0)


Notes & Attachments (0)


[Upload Files](#)

Or drop files

For Salesforce1

• Create Action in Opportunity to add the component to **Compact layout**.

- Action Type : Lightning Component
- Lightning Component : **GyanSys_chat_V1: OppTeamChatterParent**
- Label : **Chatter Plug**


 SETUP > OBJECT MANAGER
Opportunity

Edit Opportunity Action
Chatter Plug
[Help for this Page ?](#)

Details
 Fields & Relationships
 Page Layouts
 Lightning Record Pages
Buttons, Links, and Actions
 Compact Layouts
 Object Limits
 Record Types
 Related Lookup Filters
 Search Layouts
 Triggers
 Validation Rules

Enter Action Information

Object Name

Opportunity 

Action Type

Lightning Component 

Lightning Component

GyanSys_chat_V1:OppTeamChatterParent 

Height

250px 

Standard Label Type

--None-- 

Label

Chatter Plug

Name

Chatter_Plug 

Description



Icon

 [Change Icon](#)

Save

Cancel

Sample screen



Namami Mishra
Lead Qualifier





Abhijeet Bhatta
Executive Sponsor



The opportunity has
been closed.

Post Feed

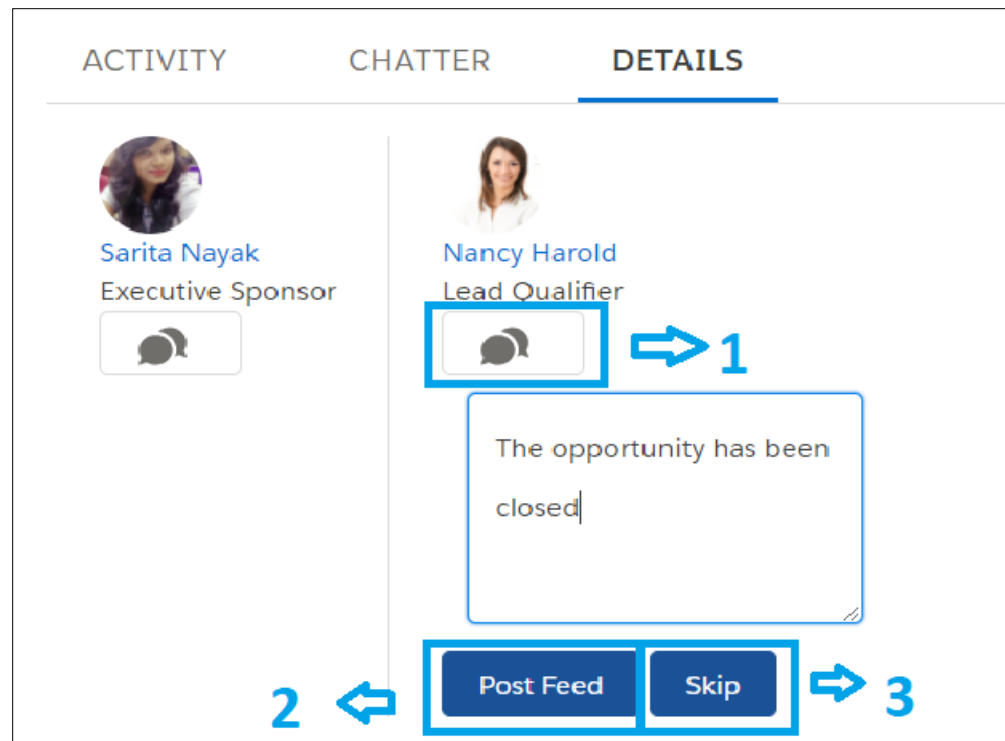
Skip



Ankita Jena
Pre-Sales Consultant

User Guide

1. To post feed on Chatter
2. Click on the Post feed button to post the written message.
3. To skip if you have changed your mind



Sample Post feed

Latest Posts ▼







[Sarita Nayak](#)

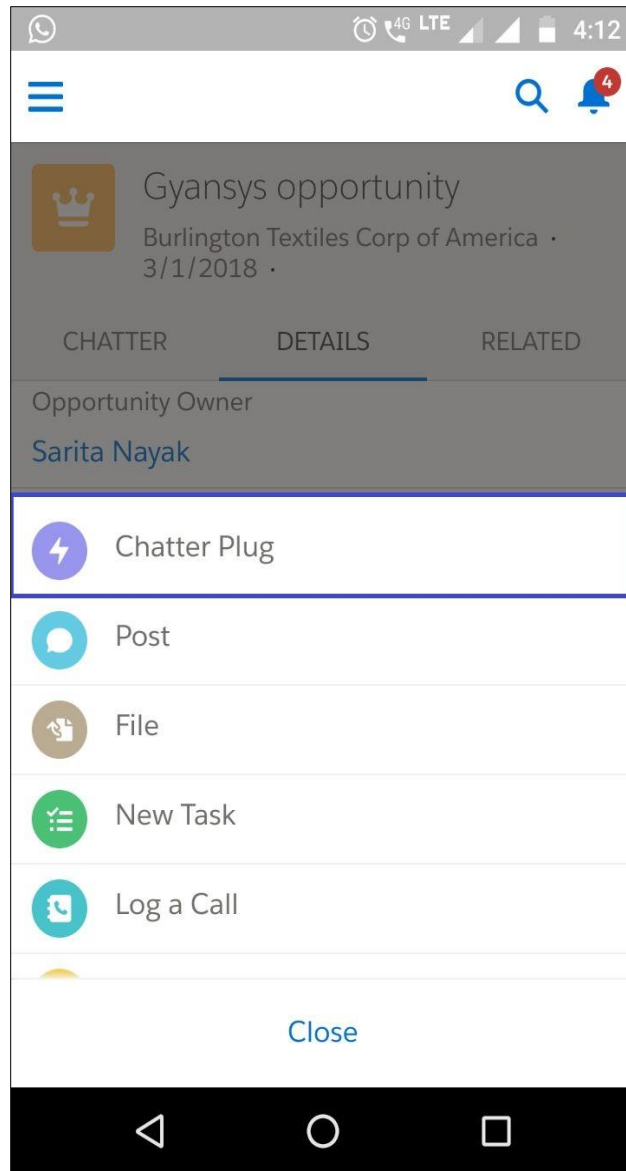
Just now

[@Nancy Harold](#) The opportunity has been closed

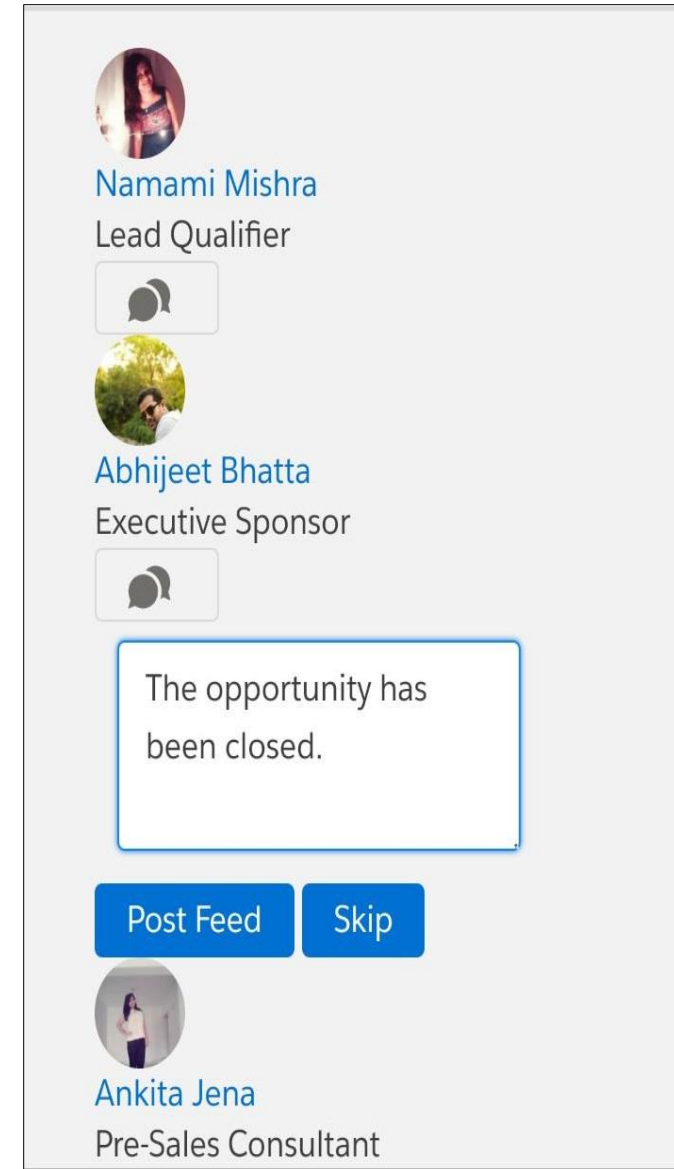
 Like

 Comment

For Salesforce1



Click on the **Chatter Plug** icon.



Write the message to be posted in chatter.

Sample post feed






CHATTERDETAILSRELATED

Follow



sarita nayak

Just now

@Abhijeet Bhatta The opportunity has been closed.

 Like

 Comment



sarita nayak

January 25, 2018 at 3:12 AM

@Namami Mishra The opportunity has been closed

 Like

 Comment

 Opportunity ...

 Post

 File

 New Task

 Show More

Connect with Us



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