Lightning Buddy User Guide

Install in a production or sandbox from the link at https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FKArSUAX

Before you install and configure :

- The current version of the package only works with Lightning apps.
- Lightning console is experimental (i.e. not fully tested)

Profiles and Permissions

Lightning Buddy uses two custom objects:

1. Actions (Actions__c) : This is the where you will configure the various actions that are required to be triggered
2. Action User Preferences (Action_User_Preferences__c) : This is the object that stores the fact that users dismissed a specific action to not be shown again.

Create a Permission set that has the follow permissions and assign them to your users that you want enable Lightning Buddy.

	A	B	C	D	E	F
1	**Object**	**API Name**	**C**	**R**	**E**	**D**
2	Actions	lightningbuddy__Actions__c		✔		
3	Action User Preferences	lightningbuddy__Action_User_Prefefence__c	✔	✔	✔	

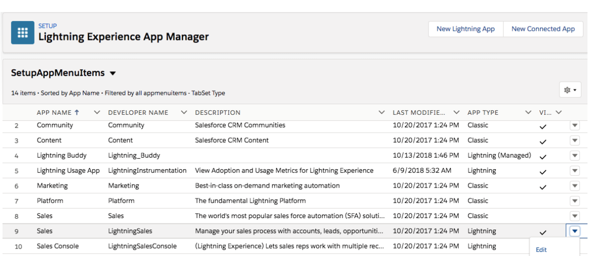
Field Level Security:

- For “lightningbuddy__Actions__c” give “Read” access to all fields in that object
- For “lightningbuddy__Action_User_Prefefence__c” give Read and Edit access to all fields in that object

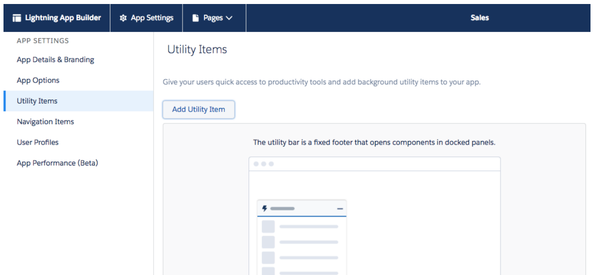
Step 1: Adding Lightning Buddy to the Utility bar

Lightning buddy uses components in the utility bar to drive the behavior and actions. You will need to create or edit your existing Lightning app that contains the various tabs/objects for your users and ensure that the utility bar is included in the new app.

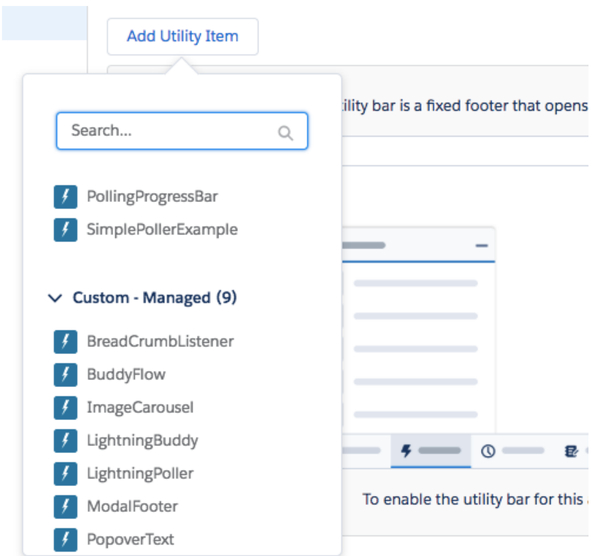
To add lightning buddy to the utility bar to an existing app:



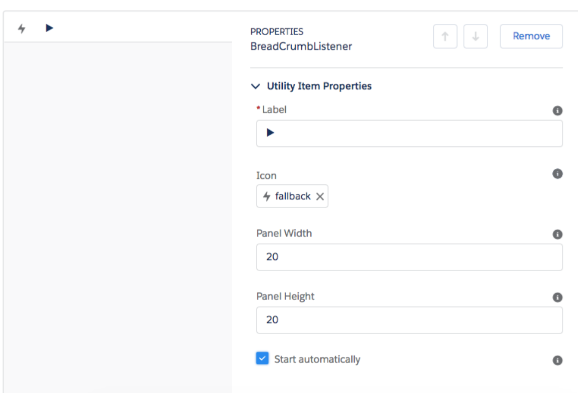
- Go to App Manager under the Setup menu
- Select “Edit” against your app



- Select Utility Items
- Click Add Utility Item



- Add the “BreadCrumbListener” and “LightningBuddy” components that show up under “Custom- Managed” section of the selection.



Note:

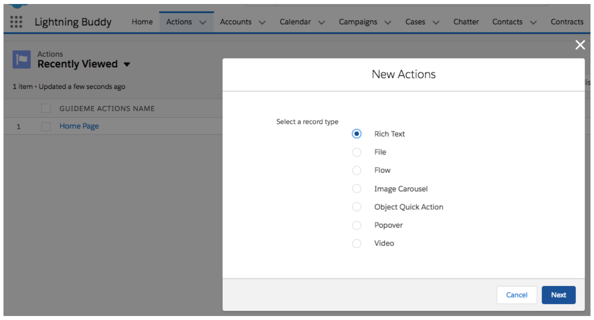
- When you add the components select the width and height as 20 pixels and make sure the “Start Automatically” check box is enabled.
- The reason we have it as 20x20 is because there isn't much to display on these utility components. In the future we may include functionality that will display something on these utility components.

Fun Tip: You can name the component with single letter symbols such as “!” or ASCII characters like ▶, ⚠ etc. Check out https://www.utf8icons.com for ASCII characters that you can use. Have some fun with it the name.

For a new app, the step are the same except you need to select the tabs/objects etc. and also ensure you provide the access to the app to the right profiles etc. Take the trailhead module at https://trailhead.salesforce.com/en/modules/lightning_apps/units/lightning_apps_create to learn more about creating a new Lightning app.

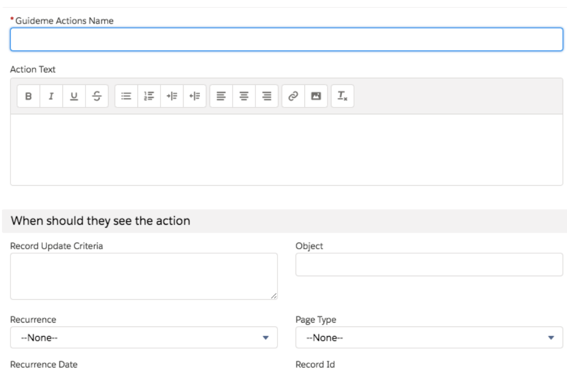
Step 2: Creating your first Lightning Buddy action

Now it's as simple as creating a new custom object.



- Click the "Actions" tab,
- Select "New"
- Pick the type of action. Let's choose a simple example of a Rich text popup.

Note: Some of the actions require some additional configuration. Review the help guide further below for specifics.



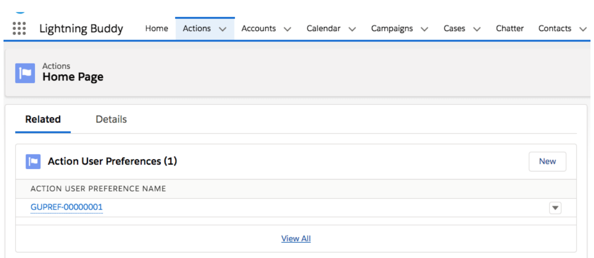
- Give your action a unique name
- Enter the rich text you want to display
- Type the object. For custom objects this is the API Name of the object (e.g. Custom_Object__c and not Custom Object)
- Select the Page Type.
- Click "Save"

For e.g. for the Home Page, choose "Home" as the Object and "Home" as the Page Type.

We'll skip the record criteria, recurrence etc. sections for now and we'll cover that in advanced configuration section later in the document.

That's it. You have created your first Lightning Buddy Action.

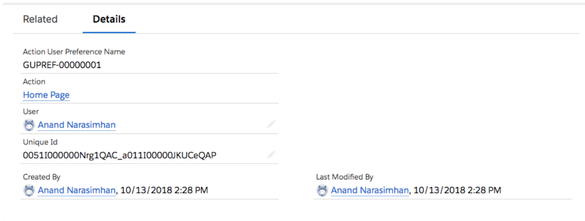
Testing your Lightning Buddy action



- Once you've configured your action, just refresh your browser window to ensure that your new actions have been cached in the utility component.
- Navigate to the page that you just configured (e.g. Home page) and your action should popup.
- If you click "Do not show this again", you can navigate to the "Action User Preferences" related list on the action and check if a new record was created for the user that you were testing.

- The details of the Action User Preference record would have the User and Unique id populated.

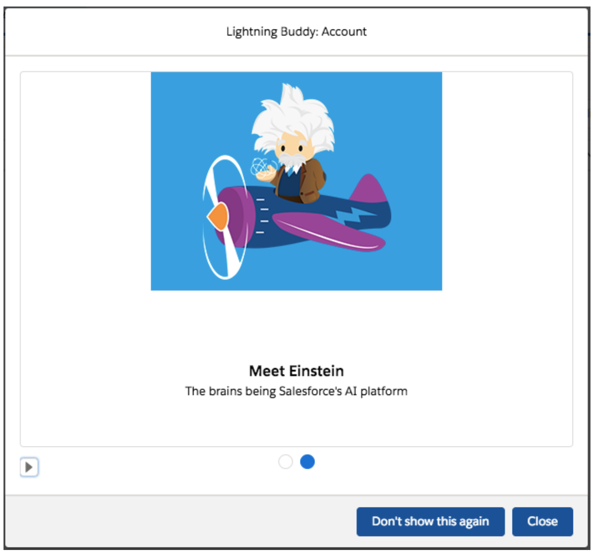
Tip: While you are testing this, you'll certainly create records for your users. When you deploy, if you want to



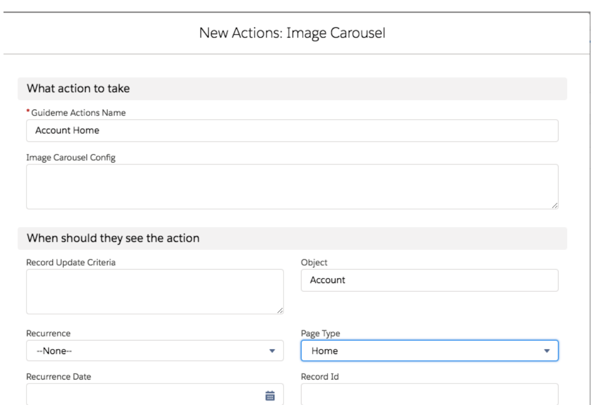
force the action to display, just delete this record for the user and the action will be triggered again.

Advanced configuration:

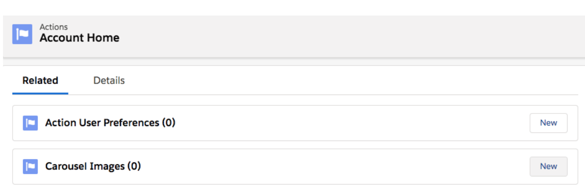
CONFIGURING AN IMAGE CAROUSEL ACTION



Here's how this action looks once you have configured it:

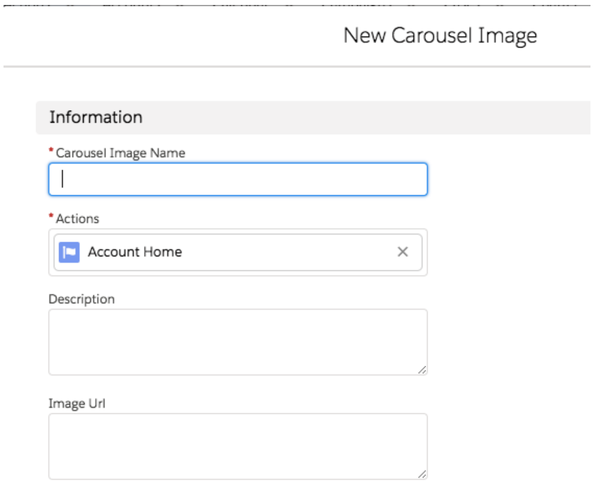


Create the action as explained in the previous section.



- In the related list, click on “New” against the “Carousel Image” related list

- Enter the following :

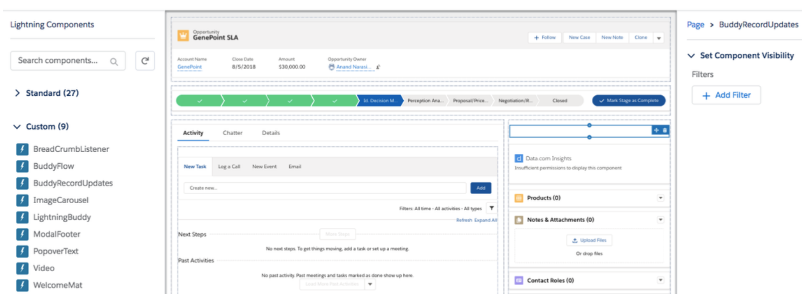


- **Name**: This is displayed as a title in the image carousel
- **Description**: Enter detailed text. Don't make this too long/big. Keep it short and simple
- **Image Url**: A https:// URL that your users can access from their desktops. (Note: This URL does'nt have to be publicly accessible. As long as your end users can access it from their browser you should be all set.)

CONFIGURING ACTIONS WHEN A RECORD IS UPDATED

You can trigger actions based on a record being updated and a criteria being met. Here's how you configure the action to trigger when a record is updated.

The following steps will require you to use Lightning app builder to configure the record detail page. If you are new to Lightning App Builder check out the trail at https://trailhead.salesforce.com/en/content/learn/modules/lightning_app_builder



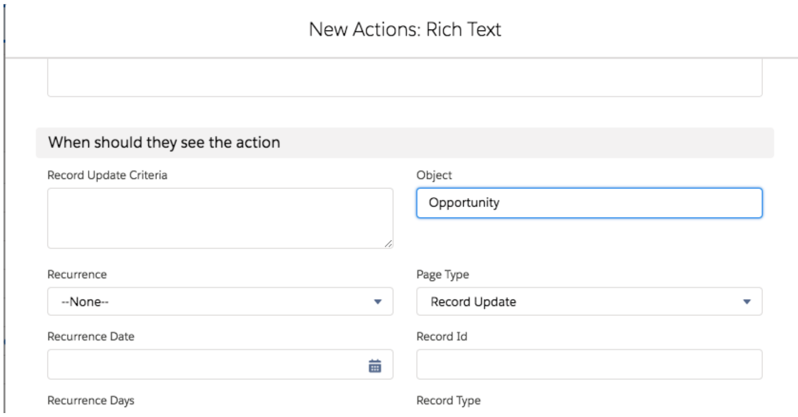
Add the BuddyRecordUpdates lightning component somewhere on your record detail page.

Note: Make sure you activate the page and apply it to the right profiles in your salesforce organization.

Fun Tip: Ensure that the component is on page always vs. putting under a tab in the page.

Create one of the Action types e.g. Rich Text. To trigger action on a record update, ensure that the Page type is set to “Record Update”.

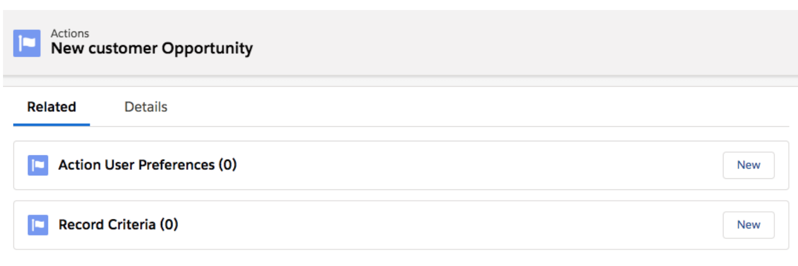
Fun tip: It's always good to include a record criteria with this type of action so that it doesn't trigger every time a record is updated.



CONFIGURING ACTIONS WITH A RECORD CRITERIA

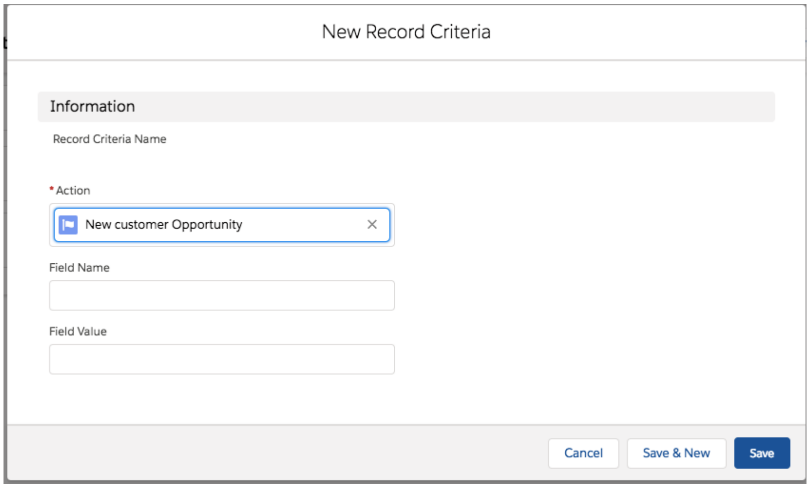
You can trigger actions only when a record matches a specific criteria. Currently the framework only supports criteria that are “additive” i.e. al criteria need to evaluate to true in order for the action to be triggered.

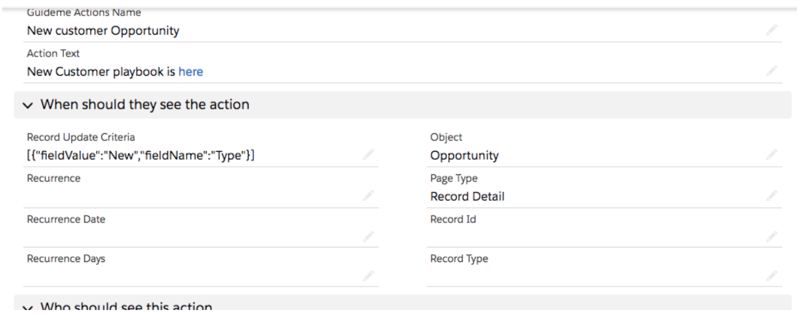
Note: Criteria only applies when the Page Type is “Record Detail” or “Record Update”



Navigate to the related tab and click on “New” on the Record criteria related list.

Add the FieldName (API Name) and the value you need to match and click save.



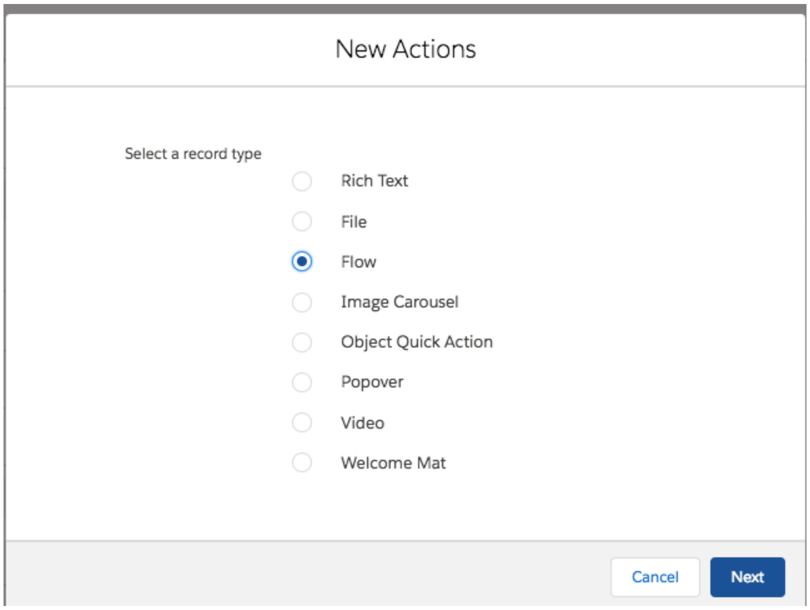


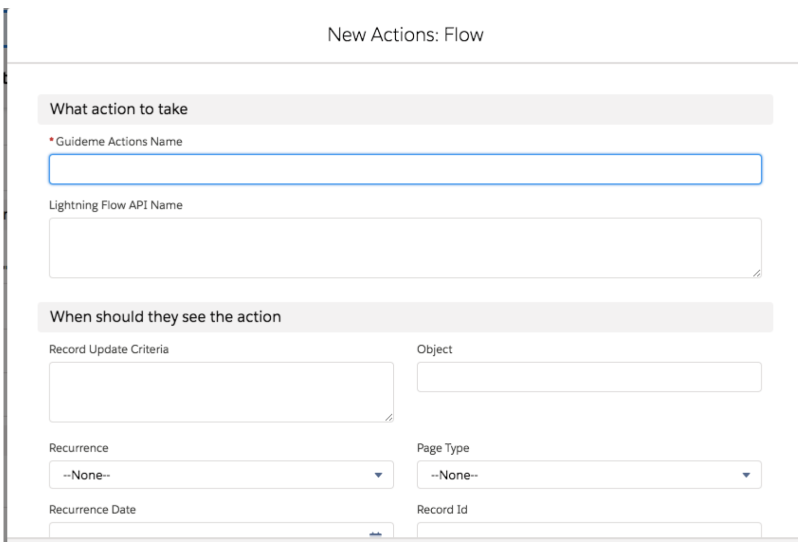
Note: Currently there is a known issue when the the record criteria isn't updated when a Record Criteria record is deleted. If you are deleting a specific criteria, blank out the field called “Record Update Criteria” field on the action. This will be resolved in the next version of the Lightning Buddy package.

CONFIGURING A “LIGHTNING FLOW” ACTION

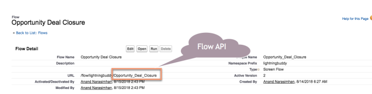
You can trigger a Lightning flow process as an action. This can be done in any type of pages. You will need an active lightning flow before you can test this action. You are not familiar with flow, check out the trail head at https://trailhead.salesforce.com/en/content/learn/modules/business_process_automation

Click on “New Action” and select the “Flow” record type.



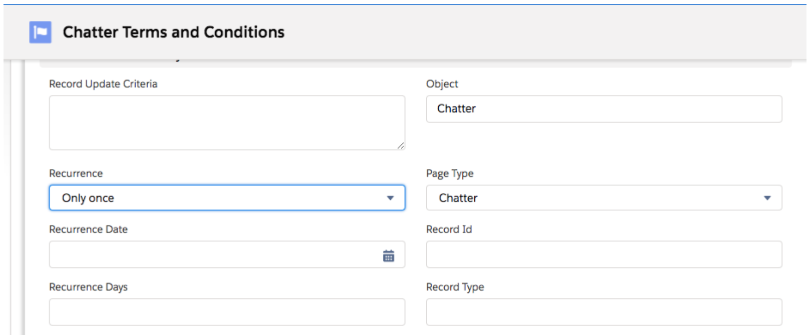


Provide the name, object and page type. Make sure that you include the “Lightning Flow API Name” field. You can get the API name when you click on the flow to view details. Below is a sample screenshot.



CREATING A “ONE TIME” ONLY ACTION

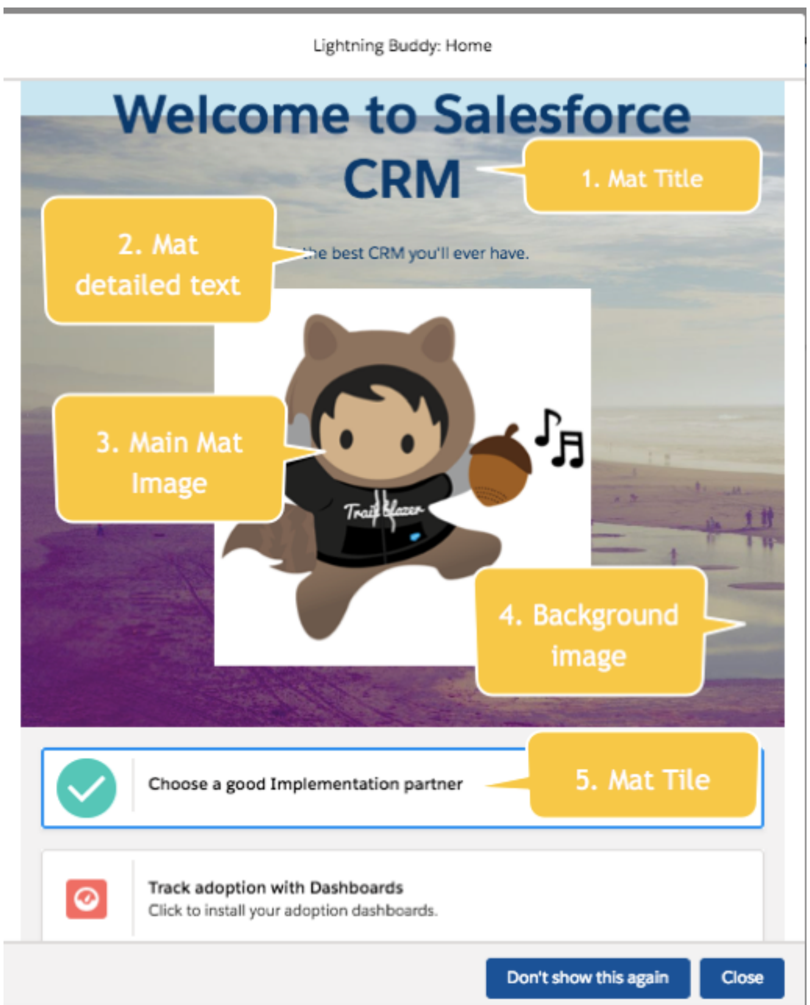
Often you want to display a specific alert/message or take action only the first time that the user or record satisfies the criteria. You can configure that easily by setting the “Recurrence” on the correspoding Action to “One time”



CONFIGURING A WELCOME MAT

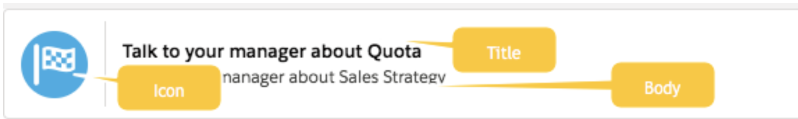
Salesforce Lightning design system offers a UI widget called the welcome mat. This is a useful widget that can be used for various use cases such as training that has one or more actions that the user should be taking. Lightning Buddy offers an easy way to configure a welcome mat.

Welcome mat action has the below configuration options:

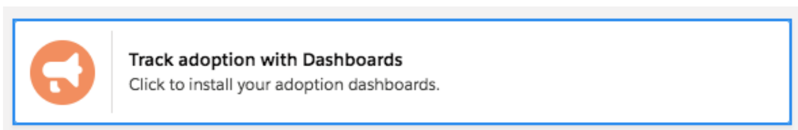


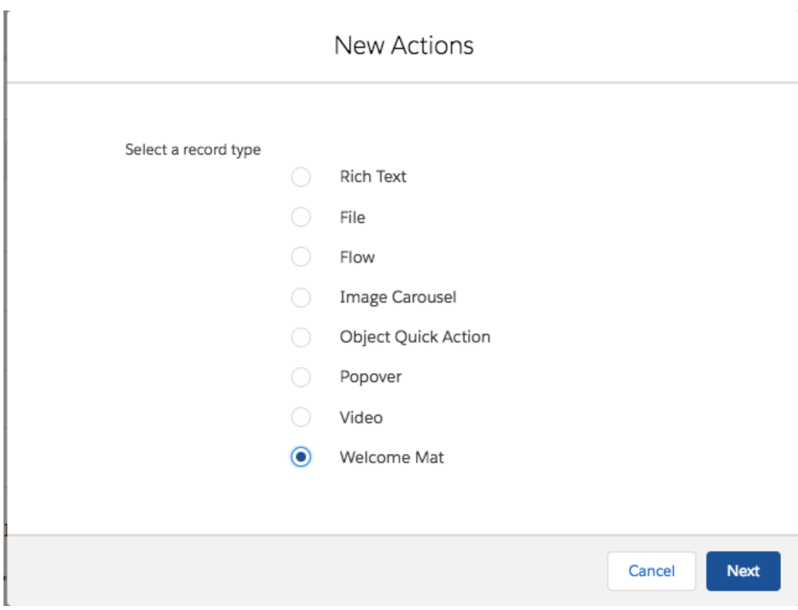
1. **Mat title**: The main title for the welcome mat action. This paramter is optional.
2. **Mat Body**: The detailed sub text that displays right below the main title. This paramter is optional.
3. **Main Image**: A main image that will be displayed below the sub text. This paramter is optional.
4. **Background image**: Background for your welcome mat. This is optional. The default lightning background will be used if this option isn't specified.
5. One or more welcome mat tiles.

The welcome mat Tile has 4 key parameters:



1. **Title**: The main title that displays on the tile
2. **Body**: Detailed subtext under the title
3. **Link**: A URL that the tile will launch on a separate browser window/tab when specified.
4. **Icon**: A Lightning design system icon CSS modified. You can choose from the various icons at https://lightningdesignsystem.com/icons/ and specify the corresponding CSS modifier. For e.g. “action:announcement” will result in the tile displayed as show on the left.

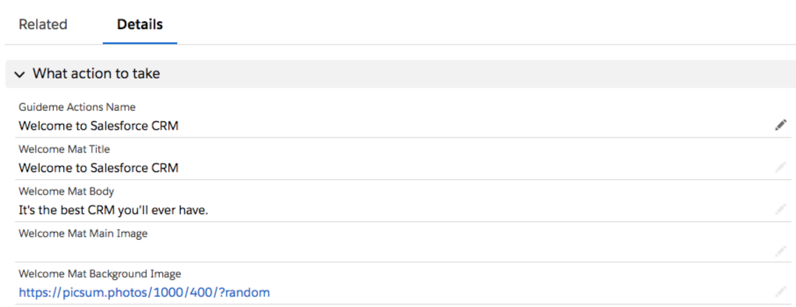




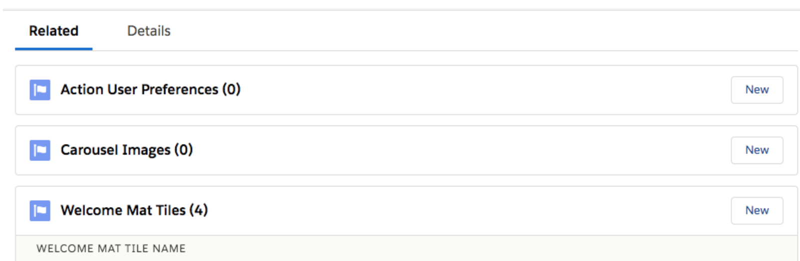
Create a new action and select the record type as “Welcome mat”

Configure the object and page type that you want to trigger the welcome mat. Configure the title, body, main image and background image of the welcome mat. None of these parameters are required but best to include 1 or more of these in order for the action to be useful to your end users.

Tip: Make sure the size of your background image and main image and sized so that your content and tiles don't scroll and the end user may never see them when the action is first displayed.

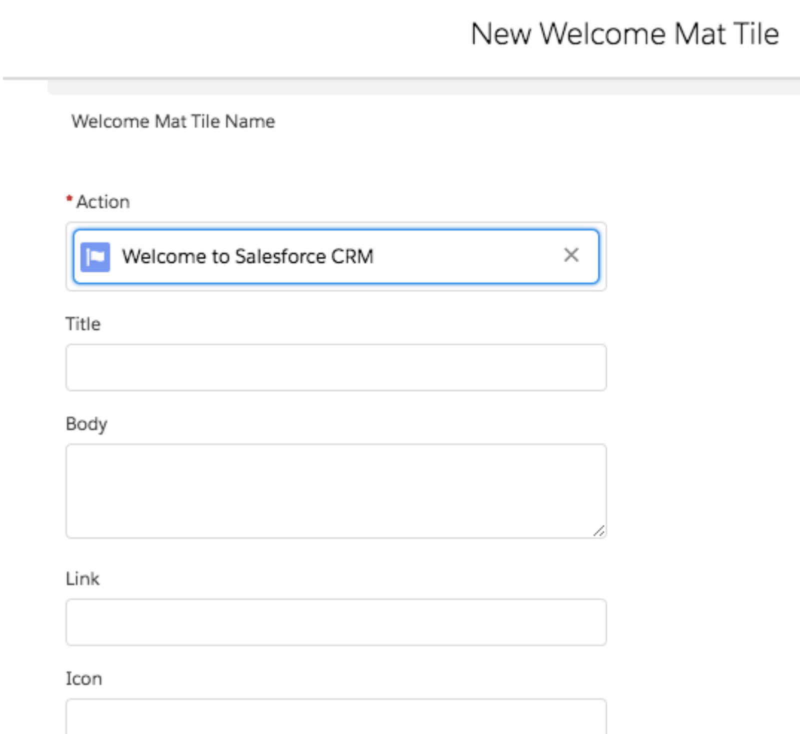


Navigate to the “Related” tab and click “New” on the “Welcome Mat Tiles”

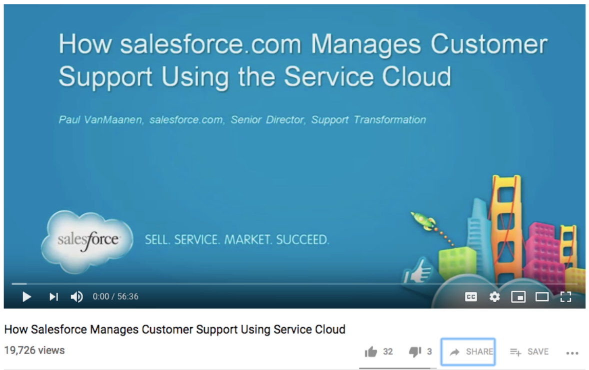


Specify a Title, Body, Link and Icon name for the tile and hit save. You can create as many tiles as you want.

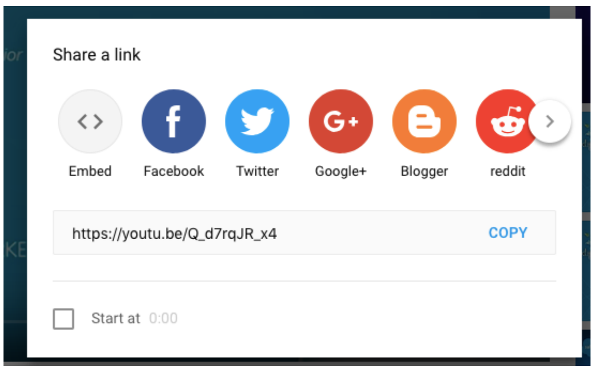
Tip: Don't create too many tiles as the content will scroll and many of your end users may never see it.



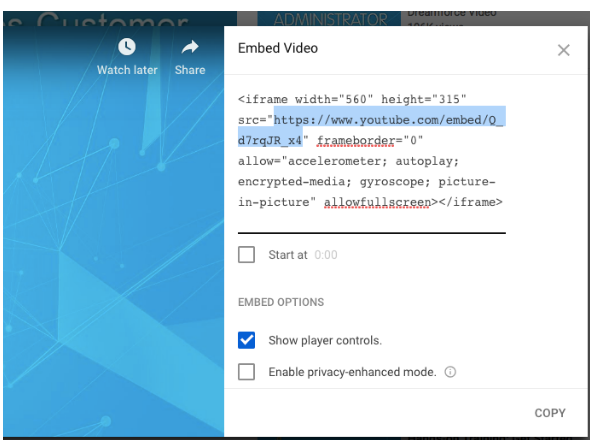
CONFIGURING A YOU TUBE VIDEO



Before you start to configure this action, you need to get the correct link from YouTube. Find the video you want to use for this action. In the botton of the video, click “Share”

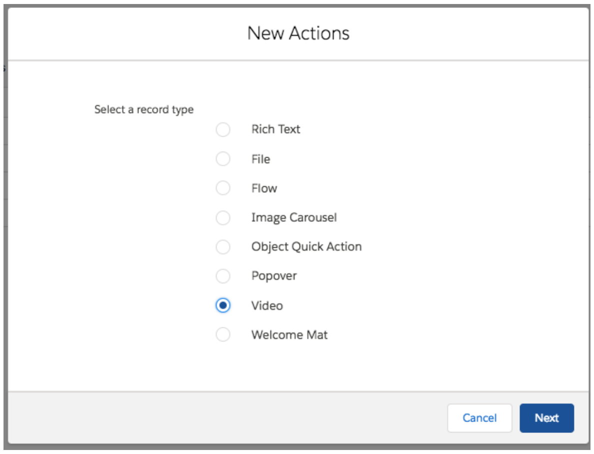


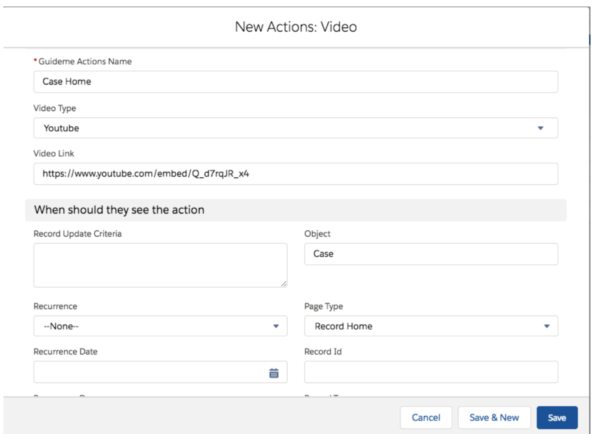
Click “Embed”



Copy the link in the “src” attribute. It'll be of the form: https://www.youtube.com/embed/somevideoId

Select “Video” record type when clicking on “New” Action and click “Next”





Give a “Name” and select the following attributes:

- Video Type: YouTube
- Video Link: The link that you extracted above
- Object : e.g. Case
- Page Type: e.g. Record Home

Click “Save”.

Note: “Vimeo” isn't supported as of the current version. Planned for next version of the package.