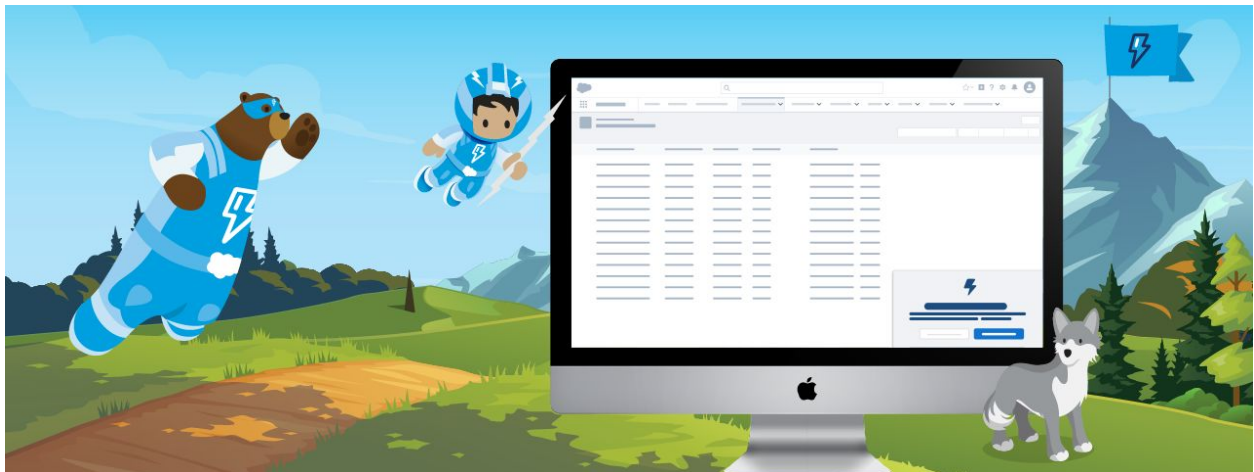




Install Instructions

In-App Guidance: Boost Sales User Productivity in Lightning Experience

Salesforce, Winter '20



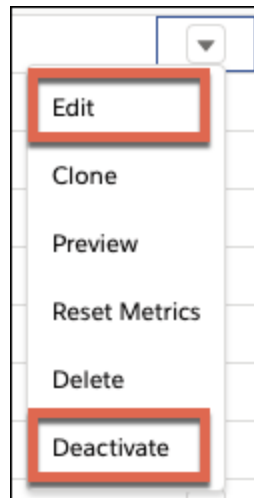
 [@salesforcedocs](#)
[@salesforce_labs](#)
Last updated: October 2019

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CONSIDERATIONS

The prompts are active after installation. If you want to delay showing the prompts to users:

- **Edit the Schedule Settings.** From In-App Guidance in Setup, select **Edit** from the row's dropdown menu. Click through to the Schedule settings, and change the start date.
- **Deactivate the prompts.** From In-App Guidance in Setup, you can turn off all the prompts that you created or installed by toggling off **Custom Org Prompts**. Or, you can turn off individual prompts using the Deactivate row-level action from the row's dropdown menu.



INSTALL THE PACKAGE

Kick-start your own Lightning Experience adoption user engagement journey with prompts that gently suggest that users try out features key to working smarter in Lightning Experience.

USER INTERFACE

Available in:

- Lightning Experience

EDITIONS

Available in:

- Essentials
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

For admins, either:

- Customize Application
- Modify All Data

For non-admins, both:

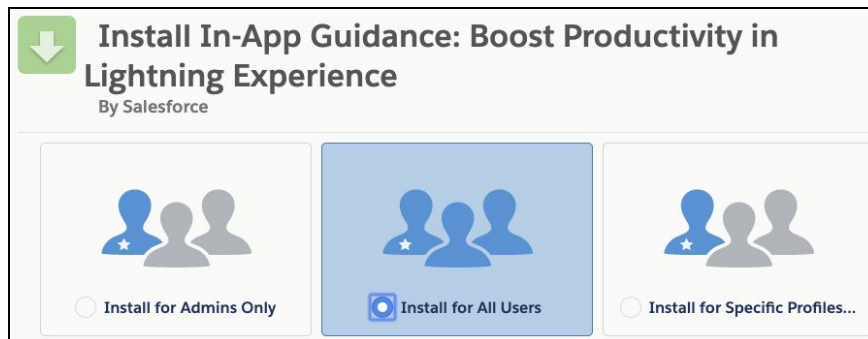
- Manage Prompts
- Modify Metadata

LICENSES

Not available for:

- Chatter External
- Chatter Free

1. Install In-App Guidance: Boost Productivity in Lightning Experience from the AppExchange listing page.
2. On the installation page, select **Install for All Users**.



3. To verify the installation, in Setup, go to Installed Packages. Under Package Name, look for In-App Guidance: Boost Productivity in Lightning Experience.
4. In Setup, go to In-App Guidance.
5. Confirm that you have 5 new prompts.
 - Chatter Profile Tips
 - Create Page Shortcuts
 - Get Help Anywhere in the App
 - List View Tips
 - Recent Item Tips

Preview and edit a prompt as needed. You can change only the Permissions and Schedule for prompts installed from a package. If you clone a prompt, you can edit all settings, except the prompt type and page location.