



Administrator Manual

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Introduction

This guide will show you how to set up AdoptionHero in your Salesforce organisation and take advantage of all its features.

Initial Set Up

Assign Licenses

Users will need a license assigned to them so they can start using AdoptionHero. Licenses can be assigned by following these steps:

1. Go to Setup and search "Installed Packages" in the left sidebar's search box.
2. Locate "AdoptionHero" in the package list and click on "Manage Licenses".
3. Click on "Add Users" and select the users you want to give access to.

Assign Permissions

Users will also need access to AdoptionHero's components. This can be achieved by assigning one of the available permission sets: AdoptionHero User (for regular users) and AdoptionHero Admin (for admin users).

Follow these steps to assign permission sets to users:

1. Go to *Setup* and search "Permission Sets" in the left sidebar's search box.
2. Open the Permission Sets page.
3. Locate the corresponding permission set and click on its name.

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

All ▾

Edit | Delete | Create New View

Help for this Page ?

New

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

☐ Action	Permission Set Label ↑	Description	License
☐ Clone	ActionPlans		Action Plans
☐ Clone	AdoptionHero Admin	Manage contextual content and submitted feedback.	
☐ Clone	AdoptionHero User	Access contextual content and submit feedback.	
☐ Clone	Analytics View Only User	User permissions for View-only licensed apps.	Analytics View Only Embedded App

4. Click on "Manage Assignments".



5. Click on "Add Assignments".
6. Tick the desired users and click "Assign".

Enable Chatter & Topics

AdoptionHero makes use of Topics to relate help articles and feedback with their context (i.e. object and page type).

Follow these steps to enable topics:

1. Switch to Salesforce Classic.
2. Go to Setup and enter "Topics for Objects" in the Quick Find box, then select "Topics for Objects".
3. Select the custom object named "Context Information".
4. Tick the checkbox "Enable Topics" and click the "Save" button to save your changes.

The screenshot shows the 'Topics for Objects' configuration page in Salesforce Classic. On the left, a table lists various objects and their 'Enabled' status. 'Context Information' is highlighted and marked as 'Enabled'. On the right, the 'Fields in context information' section shows the 'Enable Topics' checkbox checked. Below this, there are two checkboxes for selecting text fields for topic suggestions: 'Content' (unchecked) and 'Context Information Name' (checked).

Object	Enabled
Account	Disabled
Asset	Disabled
Campaign	Disabled
Case	Disabled
Contact	Disabled
Content Document	Enabled
Context Information	Enabled
Context Media	Disabled
Context Reaction	Disabled

Fields in context information

Save Cancel ☒ Enable Topics

Select the text fields you want to use for topic suggestions.

Content ☐ Context Information Name ☒

Add Component to Lightning Apps

AdoptionHero's main component is shown on what is called the Utility Bar, stuck to the bottom of the window.

Follow these steps to add the component to a Lightning app:

1. Make sure you have [set up a custom domain](#).
2. (Switch to Lightning Experience) From the Home tab in Setup, enter "App" in the Quick Find box, then select "App Manager".
3. To edit or add a utility bar to an existing app, click Edit in the dropdown menu next to your app. To create a Lightning app with a utility bar, click New Lightning App.
4. Click the Utility Items tab and add the component named "AdoptionHero Utility Bar".

The screenshot shows the 'AdoptionHero' app in the Lightning App Manager. The 'AdoptionHero Utility Bar' component is selected, and its properties are displayed on the right. The 'Utility Item Properties' section includes fields for 'Label' (set to 'AdoptionHero'), 'Icon' (set to 'help_center'), 'Panel Width' (set to 600), and 'Panel Height' (set to 600). The 'Start automatically' checkbox is checked.

AdoptionHero

PROPERTIES
AdoptionHero Utility Bar

Utility Item Properties

* Label
AdoptionHero

Icon
help_center X

Panel Width
600

Panel Height
600

☒ Start automatically

Use the settings as shown in the image.

Assign Page Layouts to Context Information Record Types

Before creating help articles you will need to set the existing page layouts to the right record types.

1. Go to *Setup* and click on the *Object Manager* tab.
2. Search "Context Information" and open its link.
3. From the menu on the left, click on "Page Layouts".
4. Click on the button named "Page Layout Assignment" that it's on the right hand side of the page.
5. Click "Edit Assignment" and set the Feedback layout to the Feedback record type, as well as the Help Article layout to the Help Article record type.
6. Save the changes.

For more information on how to assign page layouts, check [this Trailhead module](#).

Content Production

Create Rich Content

You should be ready to start creating relevant content for your users and relating it to specific topics.

The first step is to open the AdoptionHero Lightning app from the App Launcher. From there you will be able to see the "Context Information" tab, and from that tab you will be able to create new content.

Context Information records can be of two types:

- Help article: content that should be relevant to your users.
- Feedback: information captured from your users regarding their usage of the platform.

Help articles essentially have 5 pieces of information:

- Title.
- Content (rich text which can contain pictures and formatted text).
- Status. Only "Published" articles are visible to end users.
- Topics. List of categories that define when the article should be suggested.
- Media. Used to include videos that support your content.

In addition, AdoptionHero allows you to define a help article to be shown on the Home tab by ticking the "Use on Home Tab" checkbox on the record. You can use it to introduce the tool and how it works, to share contact details and other support options, or just to greet the user. Up to you.

We recommend generating content that covers:

- *critical tasks*
- *processes prone to user error*
- *tasks users usually need help with*

Supported Topics

AdoptionHero is aware of the type of page the user is looking at, and uses a combination of two topics to find related help articles and feedback. Use the below table as guidance to choose the appropriate topics for your content.

Page type	Topics to use	Examples
Named page	Home, Chatter, etc...	Home × Chatter ×
Object page	Object Name + List	Opportunity × List × Task × List ×
Record page	Object Name + Detail	Account × Detail × Report × Detail ×

Change Management

Let Users Know

An important part of implementing AdoptionHero is communicating to your users about the new app, what it does and how they can benefit from it and use it.

You can run training sessions and make use of the Home tab within AdoptionHero for this purpose.

Monitor Usage

AdoptionHero provides sample reports and a dashboard to help you understand how users are engaging with the tool and how to provide them with better support.

