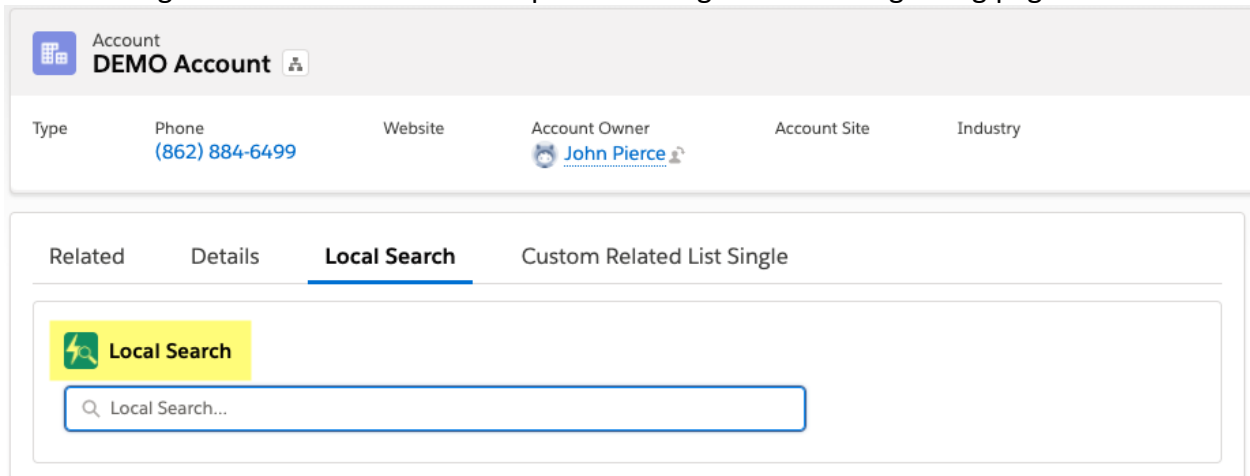


User Guide

The idea behind Local Search is to enable users to perform deep search within child records for any specific parent record. It also provides the flexibility to sub-search within child records and easily maneuver to other records.

Desktop usage

- Navigate to the Local Search component configured for the lightning page

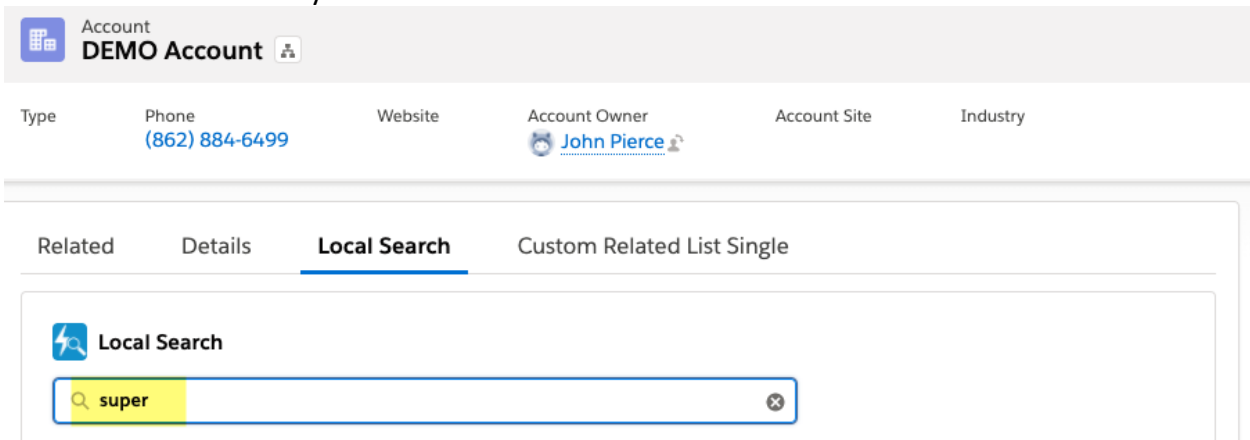


The screenshot shows the top section of a Lightning page. At the top, there's a header bar with a building icon, the text 'Account DEMO Account', and a user icon. Below this is a table with columns: Type, Phone, Website, Account Owner, Account Site, and Industry. The Phone column contains '(862) 884-6499' and the Account Owner column contains 'John Pierce' with a user icon. Below the table, there's a navigation bar with four tabs: 'Related', 'Details', 'Local Search' (which is selected and underlined), and 'Custom Related List Single'. Under the 'Local Search' tab, there's a yellow box with a lightning bolt icon and the text 'Local Search'. Below this is a search input field with a magnifying glass icon and the placeholder text 'Local Search...'.

- Based on the configuration enabled by your Admin, user can have two flavors of Local Search:
 - List View
 - Compact View

List View:

- Enter the key word in the search box



This screenshot is similar to the one above, showing the same Lightning page header and navigation bar. However, the search input field under the 'Local Search' tab now contains the word 'super' in a yellow box, and a small 'x' icon is visible at the end of the input field.

- Upon hitting enter, users will see only the child objects that have results and count against each child object


Account
DEMO Account


Type Phone
(862) 884-6499
Website Account Owner
 John Pierce
Account Site Industry

Related Details **Local Search** Custom Related List Single


Local Search


super



Cases (25)


Search this list...

Case Reason	Case Type	Closed Date	Description	Subject
Equipment Design	Mechanical		Design issue with me...	Design issue with me...
Installation	Electrical		Super Spider	Super Spider
Feedback	Other		Maintenance guidelin...	Maintenance guidelin..
Installation	Electrical		Seeking guidance on ...	Seeking guidance on ..


Opportunities (3)


Search this list...

Account Name	Amount	Close Date	Description	Stage
DEMO Account	\$915,000.00	12/03/2018		Closed Won
DEMO Account	\$270,000.00	12/03/2018		Proposal/Price Quote
DEMO Account	\$125,000.00	12/28/2021		Negotiation/Review

- Users can perform search within each sub-component to further filter-down the results:


Local Search


Cases (25)

Case Reason ▾	Case Type ▾	Closed Date	Description ▾	Subject ▾
Installation	Electrical		Super Spider	Super Spider
Installation	Electrical		Seeking guidance on ...	Seeking guidance on ..
Installation	Electrical		Super Spider	Super Spider
Installation	Electrical		Seeking guidance on ...	Seeking guidance on ..

- User can sort the columns based on their needs:

Related
Details
Local Search
Custom Related List Single


Local Search


Cases (25)

Case Reason ↑ ▾	Case Type ▾	Closed Date	Description ▾	Subject ▾
Equipment Complexity	Electrical	01/02/2021	Starting generator aft...	Starting generator aft..
Equipment Design	Mechanical		Design issue with me...	Design issue with me...
Equipment Design	Mechanical		Design issue with me...	Design issue with me...
Equipment Design	Mechanical		Design issue with me...	Design issue with me...

- User can navigate to a particular child record by clicking on the hyperlink

- User can click on header of child component to navigate to view the entire list of child records

Related Details **Local Search** Custom Related List Single

 **Local Search**

 **Cases (25)**

Case Reason	Case Type	Closed Date	Description	Subject
Equipment Design	Mechanical		Design issue with me...	Design issue with me...
Installation	Electrical		Super Spider	Super Spider
Feedback	Other		Maintenance guidelin...	Maintenance guidelin...
Installation	Electrical		Seeking guidance on ...	Seeking guidance on ...

- User can perform a search within this component, sort the columns, navigate to any specific record by clicking on the hyperlink or navigate back to the Local Search by hitting on browser “back” button

 **Cases (25)**

Case Reason ↑	Case Type	Closed Date	Description	Subject
Equipment Complexity	Electrical	01/02/2021	Starting generator after electrical failu...	Starting generator after electrical failure
Equipment Design	Mechanical		Design issue with mechanical rotor Su...	Design issue with mechanical rotor
Equipment Design	Mechanical		Design issue with mechanical rotor Su...	Design issue with mechanical rotor
Equipment Design	Mechanical		Design issue with mechanical rotor Su...	Design issue with mechanical rotor
Equipment Design	Mechanical		Design issue with mechanical rotor Su...	Design issue with mechanical rotor
Equipment Design	Electrical	01/02/2021	Motor design hindering performance ...	Motor design hindering performance
Feedback	Other		Maintenance guidelines for generator ...	Maintenance guidelines for generator ...
Feedback	Other		Maintenance guidelines for generator ...	Maintenance guidelines for generator ...
Feedback	Other		Maintenance guidelines for generator ...	Maintenance guidelines for generator ...
Feedback	Other		Maintenance guidelines for generator ...	Maintenance guidelines for generator ...
Feedback	Other	01/02/2021	Generator assembly instructions uncl...	Generator assembly instructions uncl...
Installation	Electrical		Super Spider	Super Spider
Installation	Electrical		Seeking guidance on electrical wiring i...	Seeking guidance on electrical wiring i...
Installation	Electrical		Super Spider	Super Spider

Compact View

- Enter the key word in the search box and hit enter.
- User will see the child objects that have results and count against each child object

 **Local Search**

 **Cases (25)**

 **Opportunities (3)**

 **Tasks (3)**

 **Events (50)**

 **Files & Attachments (7)**

- Upon clicking on any of the links, the user will be navigated to a new view with list of all the matching records.

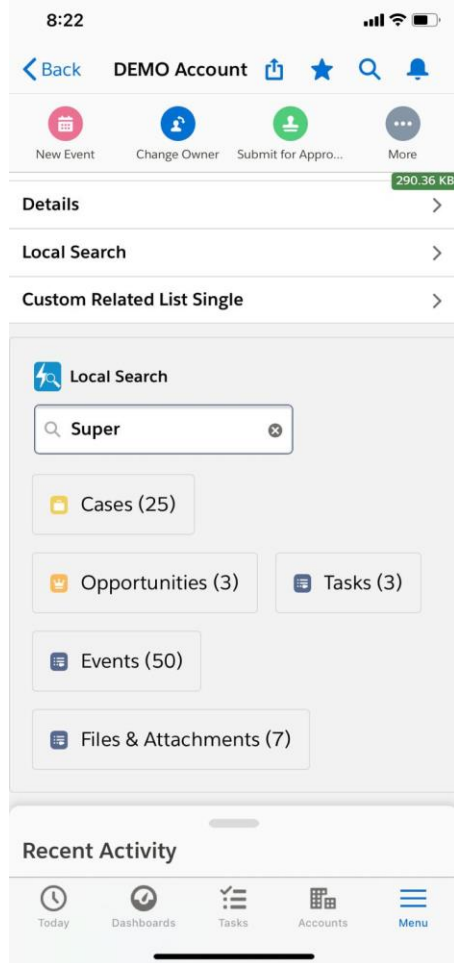
 **Cases (25)**

Case Reason ↑	Case Type	Closed Date	Description	Subject
Equipment Complexity	Electrical	01/02/2021	Starting generator after electrical failu...	Starting generator after electrical failure
Equipment Design	Mechanical		Design issue with mechanical rotor Su...	Design issue with mechanical rotor
Equipment Design	Mechanical		Design issue with mechanical rotor Su...	Design issue with mechanical rotor
Equipment Design	Mechanical		Design issue with mechanical rotor Su...	Design issue with mechanical rotor
Equipment Design	Mechanical		Design issue with mechanical rotor Su...	Design issue with mechanical rotor
Equipment Design	Electrical	01/02/2021	Motor design hindering performance ...	Motor design hindering performance
Feedback	Other		Maintenance guidelines for generator ...	Maintenance guidelines for generator ...
Feedback	Other		Maintenance guidelines for generator ...	Maintenance guidelines for generator ...
Feedback	Other		Maintenance guidelines for generator ...	Maintenance guidelines for generator ...
Feedback	Other		Maintenance guidelines for generator ...	Maintenance guidelines for generator ...
Feedback	Other	01/02/2021	Generator assembly instructions uncle...	Generator assembly instructions uncle...
Installation	Electrical		Super Spider	Super Spider
Installation	Electrical		Seeking guidance on electrical wiring i...	Seeking guidance on electrical wiring i...
Installation	Electrical		Super Spider	Super Spider

Mobile Usage

It is recommended to use compact view for the mobile usage because of the space constraints

- Navigate to the Local Search component on the Salesforce1 mobile app.
- Enter the key word and hit enter
- User will see the child objects that have results and count against each child object



- Users can navigate to the list of child object results list by clicking on the tiles. And further navigate to specific child record by clicking on hyperlink

