

Admin Guide

After installing into Production or Sandbox, follow the below steps to configure the Local Search for your record pages.

Step 1: Permission Set Assignment

- The package comes with Two permissions sets:
 - **Local Search User:** This permission is needed for the end users to use the Local Search component.
 - **Local Search Admin:** This permission is needed for an admin user to configure the Local Search component for an organization based on their business needs

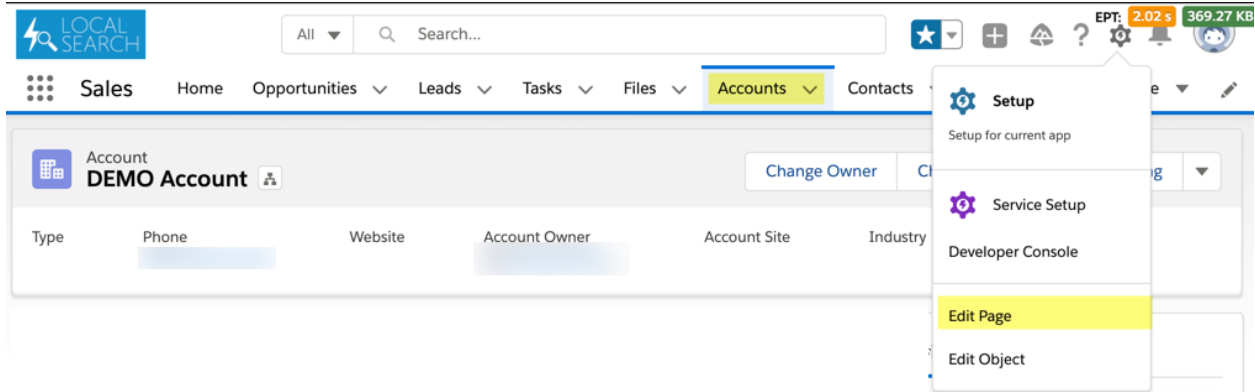
Step 2: Creating Local Search Configurations

- Navigate to the Local Search Configuration tab
- The list on the left panel shows the existing configurations for Local Search
- Click on 'New' button to create a Local Search Configuration item for an object
- Provide the Configuration Name, Parent Object Name (Object on which the search component will be place) and Child Objects (Objects that will show up in result set)
- For each selected child object, select the columns in result, field on which the result set will be sorted, sort order and # of records you want to display in the result set

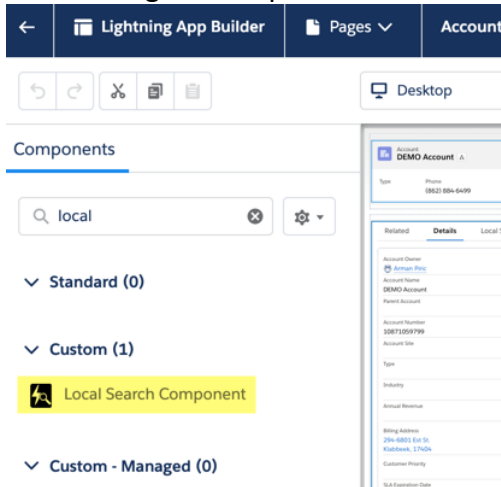
The screenshot displays the 'Local Search - Configuration' interface. On the left is a 'CONFIGURATION LIST' with a search bar and a 'New' button. Below it is a list of configurations: 'Contract Cycle - Demo', 'home page search', 'Opportunity Test', 'Contact - Demo', 'Custom Object (Config)', 'Contact Page', 'Account - Deep Search', 'Account - Cases Search', 'Account - Demo (Do not Delete)' (highlighted), 'Account Cases', 'Digital Info', 'Account Commercial', and 'Solution Search - All'. The main area is titled 'CONFIGURATION DETAIL : ACCOUNT - DEMO (DO NOT DELETE)'. It contains fields for 'Configuration Name' (Account - Demo (Do not Delete)) and 'Parent Object Name' (Account). Below these is a 'Select Child Objects (1-8)' section with 'Available' and 'Selected' lists. The 'Available' list includes Account, Asset, Authorization Form Consent, Communication Subscription..., Contact Point Address, Contact Point Email, and Contact Point Phone. The 'Selected' list includes Contact, Case, Opportunity, Event, and Task. A checkbox 'Include Files & Attachments' is checked. On the right is the 'CONFIGURATION : SEARCH RESULT OBJECTS' section for 'Contact'. It shows 'Select Columns in Result (1-6)' with 'Available' and 'Selected' lists. The 'Available' list includes Assistant's Name, Asst. Phone, Birthdate, Business Fax, Contact Description, and Contact ID. The 'Selected' list includes Full Name, Title, Business Phone, Email, Department, and Account ID. Below this are 'Sort Field' (Email), 'Sort Type' (Descending), and 'Record Limit (1-200)' (5). At the bottom, there are expandable sections for 'Case' and 'Opportunity'.

Step 3: Adding Local Search component into Lightning Page

- Edit the lightning page of the parent object where you want to enable local search



- Search for the Custom component 'Local Search Component' on the left-hand panel and drag and drop into a desired location



- Provide *Title* and *Select A Configuration* defined in Step2

Page > Local Search Component

Title ?

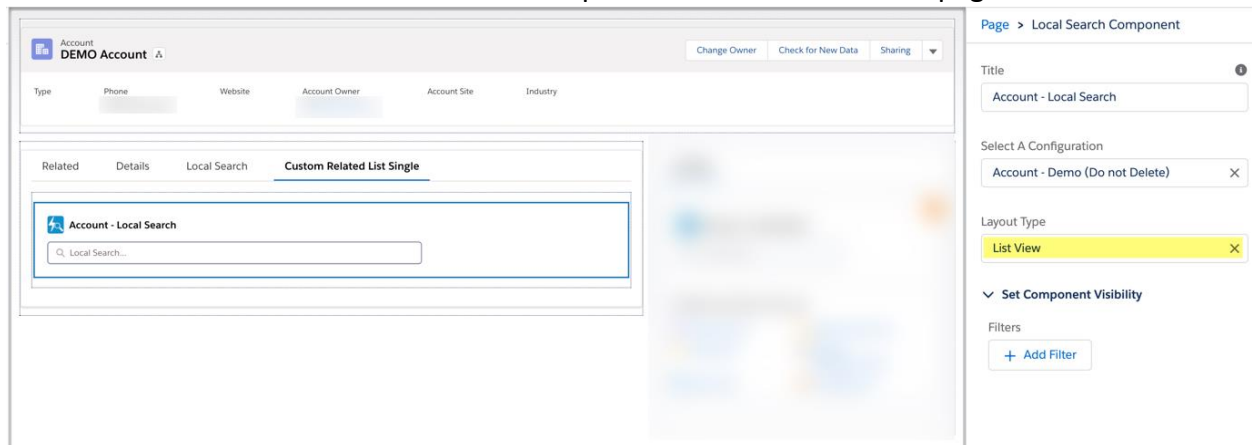
Account - Local Search

Select A Configuration

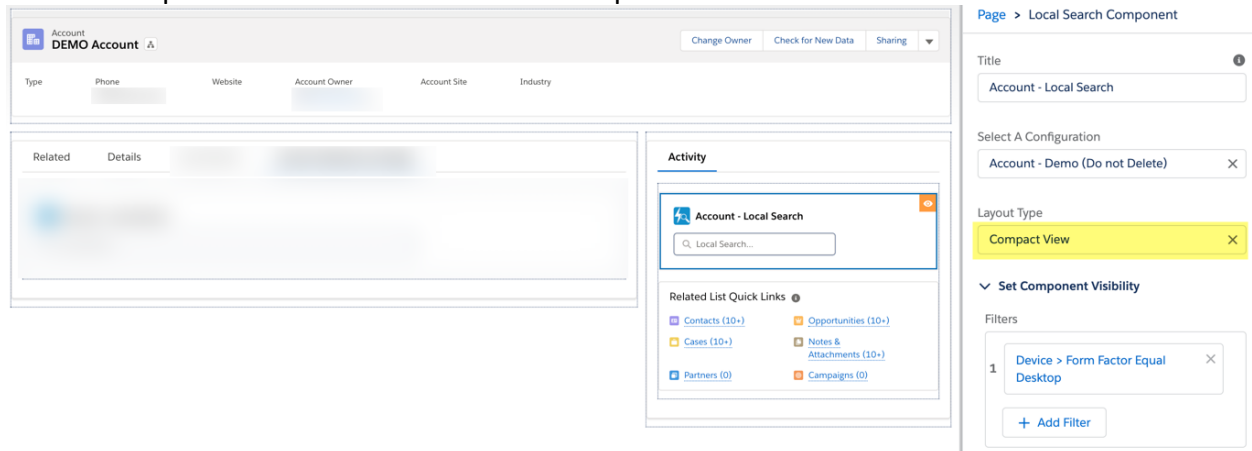
Account - Demo (Do not Delete) ×

Step 3.1: For Desktop configuration

- Both List View and Compact View layouts are supported on desktop
- List View is recommended when a separate tab is defined in the page

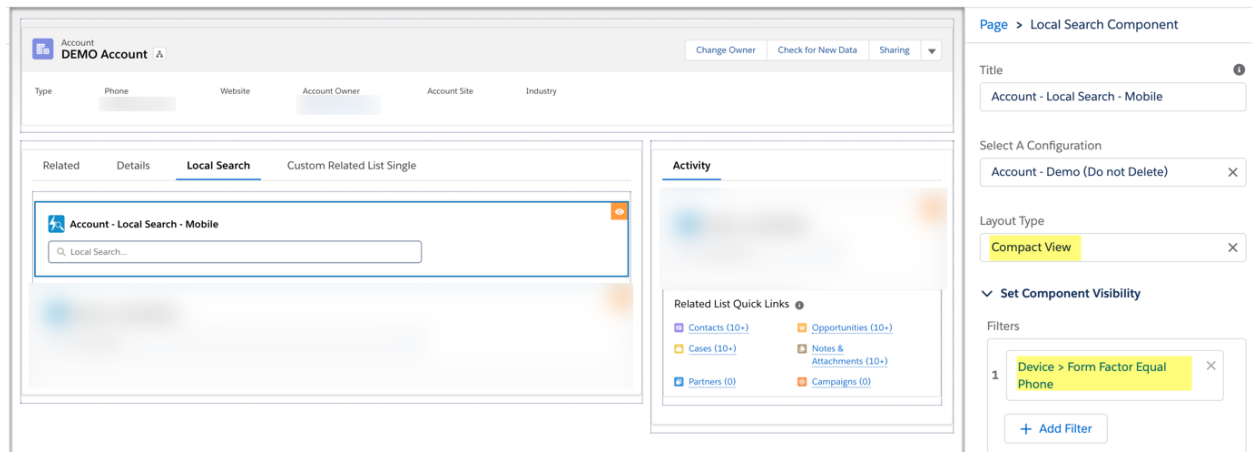


- Compact View is recommended when space is a constraint



Step 3.2: For Mobile configuration

- Compact View is recommended for mobile usage
- Defined a filter for device form factor = Mobile



Result:

 **Account - Local Search**

 **Contacts (5)**

Full Name	Title	Business Phone	Email	Department	Account
Whilemina Sexton	Super Man	(280) 433-1860	 sem@pedemalesu...		DEMO Account
Dennis Tyler	Super Man	(390) 442-8717	 non@phaselluslibe...		DEMO Account
Hop McGowan	Super Man	(906) 729-7985	 neque.vitae@sedle...		DEMO Account
Knox McLaughlin	Super Man	(282) 656-7596	 mattis.ornare.lectu...		DEMO Account

 **Cases (10)**

Case Number	Account	Case Origin	Case Reason	Closed Date
00001026	DEMO Account	Phone	Installation	01/25/2021
00001027	DEMO Account	Web	Performance	01/02/2021
00001028	DEMO Account	Phone	Other	01/02/2021
00001029	DEMO Account	Web	Equipment Design	