



JustClick Installation Guide



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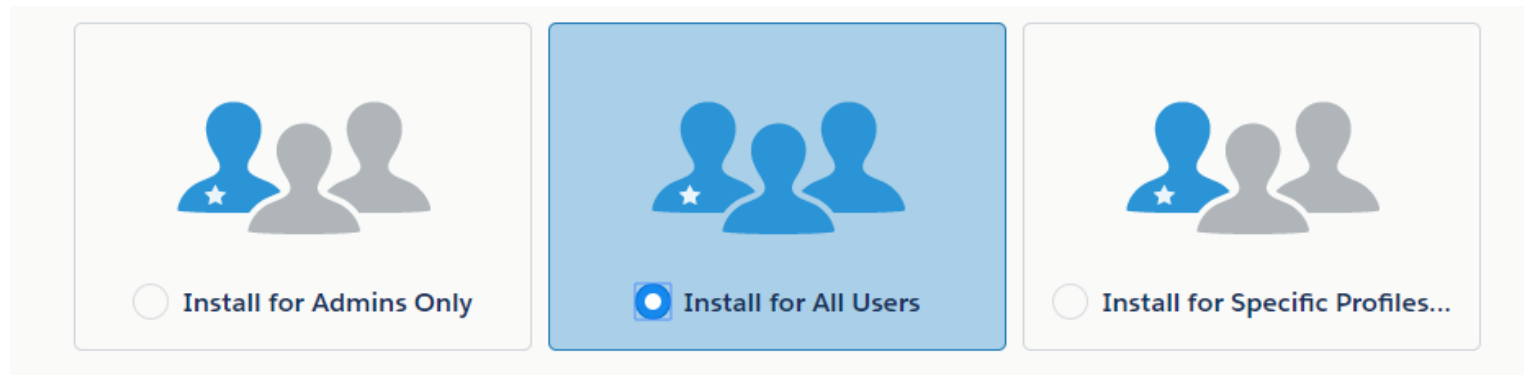
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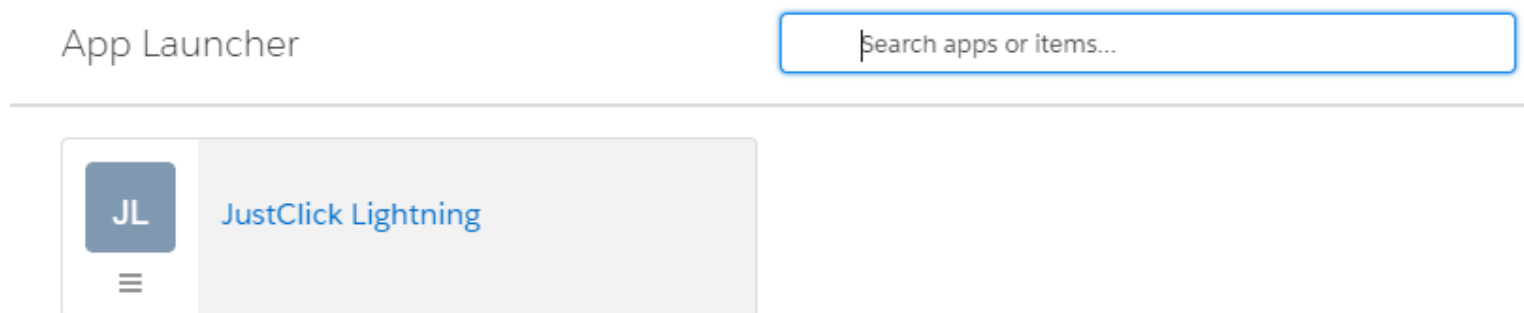


Installation Steps

1. Visit <https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000FR4N9UAL> for installing **“JustClick”** app
2. Enter your login credentials for the Salesforce organization where you’d like to install the application
3. After entering your credentials, you will be asked to select the users for whom you want to install the application. Please select **“Install for All Users”**



4. After successful installation, Please validate the installation by verifying the new app from the App Launcher



Add Custom Component to Object Page Layouts

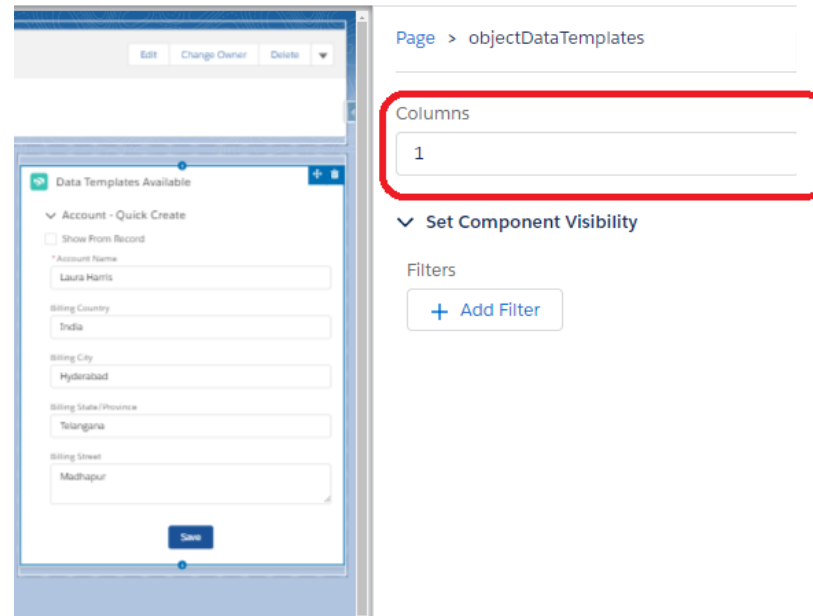
Steps to add component to object page layout

1. Go to record detail page of an object (Account or contact, etc. based on requirement)
2. Click **Edit Page** button from the gear icon on the top
3. Drag the component 'objectDataTemplates' from **Custom components** list on the left and place it to the canvas

The screenshot displays the Lightning App Builder interface for editing the 'Account Record Page'. The top navigation bar includes 'Lightning App Builder', 'Pages', and the page title 'Account Record Page'. Below this, there are navigation buttons like 'Back' and 'Help', and action buttons like 'Save' and 'Activation...'. The main workspace shows a preview of the account record page for 'Dickenson plc'. On the left, the 'Lightning Components' panel is visible, with a search bar and a list of components. Under the 'Custom (3)' section, the 'objectDataTemplates' component is highlighted with a red box. A red arrow points from this component to the 'Data Templates' section in the preview canvas. On the right, the 'Page' configuration panel is shown, with fields for 'Label' (Account Record Page), 'Developer Name' (Account_Record_Page), 'Page Type' (Record Page), 'Object' (Account), and 'Template' (Header and Right Side...).

Add Custom Component to Object Page Layouts

6. Click on the component and Select the number of **columns**. By default component displays in a single column view. Update the number of columns to 2 or 3 based on spacing availability in the page
7. Click on Activation button and Complete the activation settings
8. Click Save button

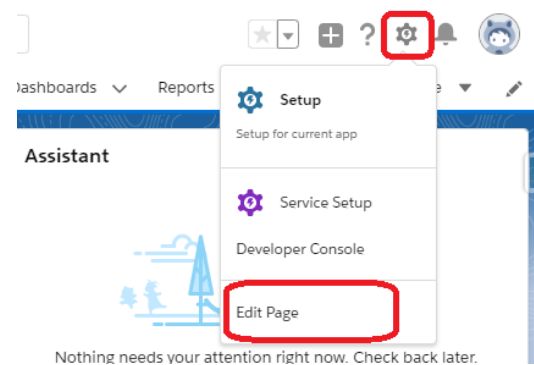


Repeat the above steps for all Lightning page layouts and for each object to add the custom component to your Lightning pages

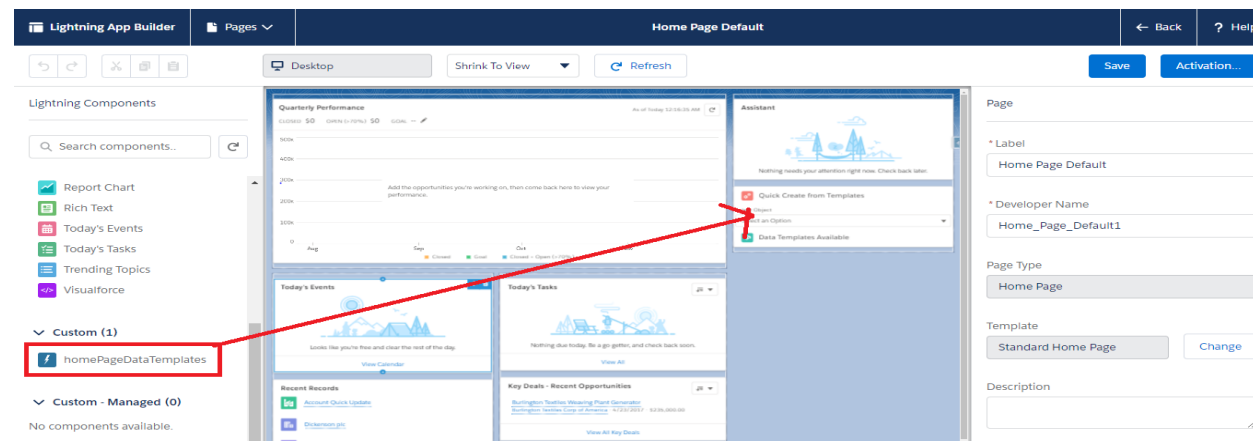
Add the Custom Component to Home Page

Steps are as follows

1. Go to Home page by clicking **Home** Tab
2. Click **Edit Page** button from the gear icon on the top



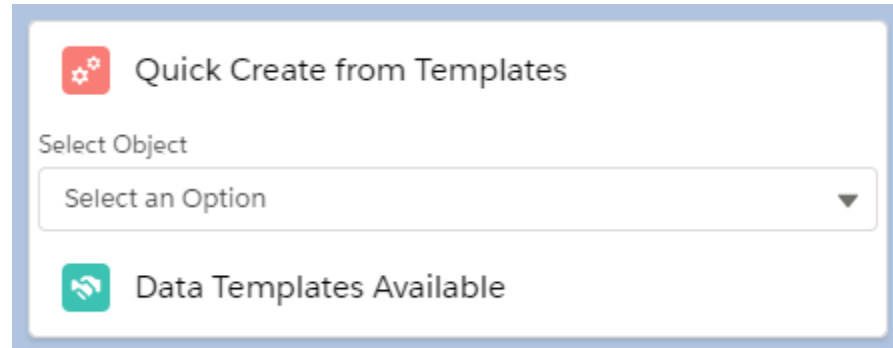
3. Drag the component “homePageDataTemplates” from **Custom components** list to the canvas



Add the Custom Component to the Home Page

4. Click on **Activation** button and complete activation settings
5. Click **Save** button

Now, the data template will be added to the home page as follows:



The screenshot shows a Salesforce component titled "Quick Create from Templates". It features a red gear icon. Below the title is a "Select Object" dropdown menu with the text "Select an Option" and a downward arrow. At the bottom, there is a green icon with two hands and the text "Data Templates Available".

FAQs

Q: Unable to find Lightning Components to add to the page?

A: It is most likely when My Domain is **NOT** enabled on the Org. Please ensure My Domain is enabled for the Org. to use custom Lightning components.

Q: Can I create templates for custom objects?

A: Yes. You can create data templates for all custom objects.

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Q: Is there any limitations with Just Click app?

A: Currently, Data Template cannot be created for Task and Events.

Q: Will this app work in Classic experience?

A: No. Just Click app only works in Lightning Experience.

Q: Is there a limit on number of templates created for a single object?

A: There is no limit as such. But we suggest not to create a lot of number records which may be hard to maintain.

<epam>

Thank You!

