

Instant User Feedback Installation and Setup Guide

Version 1.0
November 1, 2022

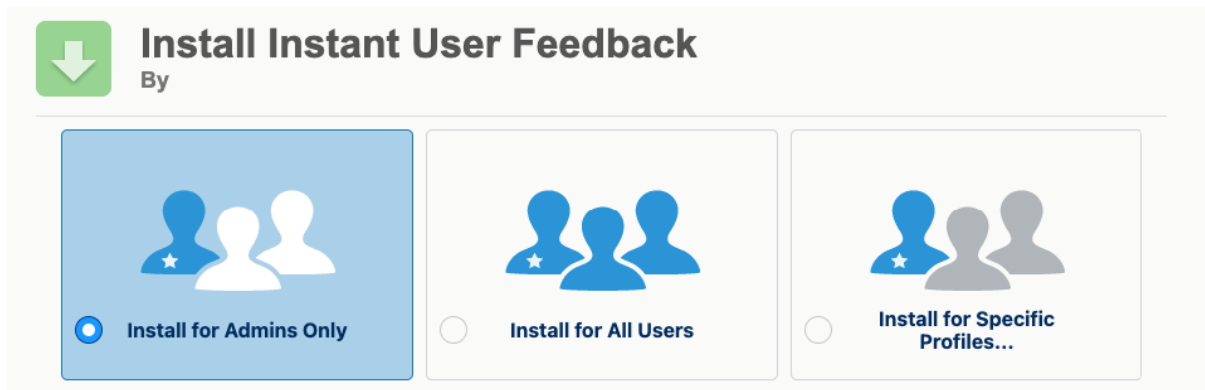


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Installation

Install Instant User Feedback directly from the Salesforce AppExchange. Make sure to use the option “Install for Admins Only”.



Setup

Permissions

Assign the Permission Set “Instant User Feedback – Administrators” to all System Administrators
Assign the Permission Set “Instant User Feedback – User” to all Users that need to use the application

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

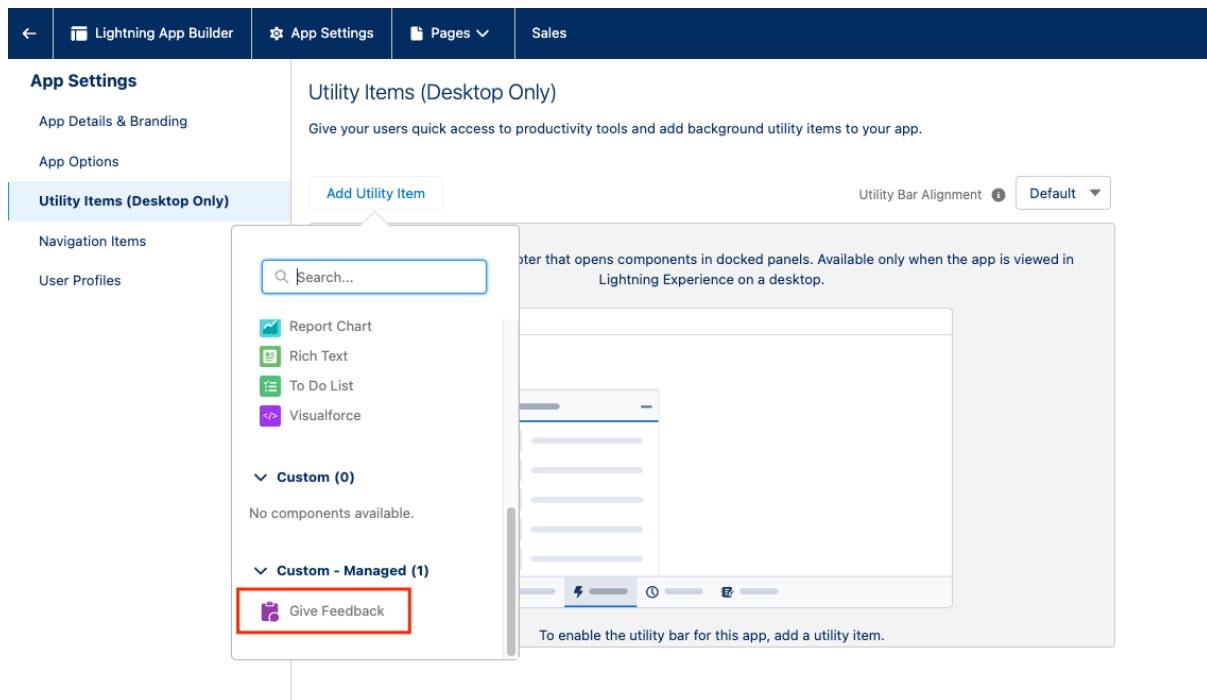
New

1

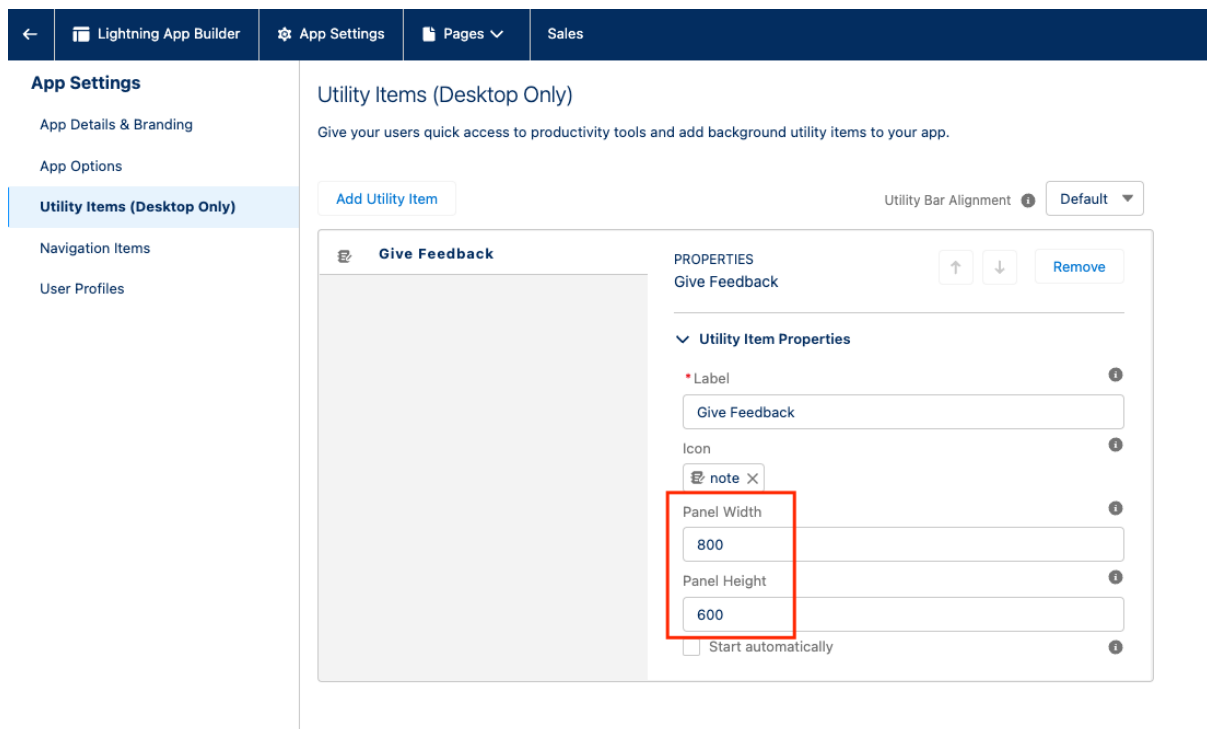
Action	Permission Set Label	Description	License
Clone	Buyer	Allows access to the store. Lets users see products and categories, make purchases, and add products to a wishlist.	B2B Buyer Permission Set One Seat
Clone	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and orders related to their account. Also lets users manage contacts and...	B2B Buyer Manager Permission Set One Seat
Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
Clone	FieldServiceMobileStandardPermSet	Give your mobile workforce access to the Field Service mobile app. Set them up with the right user license and permissions.	Field Service Mobile
Clone	Instant User Feedback - Administrator	Gives the Admin access to the Instant User Feedback app, including the configuration settings	
Clone	Instant User Feedback - User	Gives Users access to the Instant User Feedback app	
Clone	Merchandiser	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Salesforce CMS with any endpoint.	Cloud Integration User
Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
Clone	Security Center Integration User	Access Security Center for Integration	Cloud Integration User
Clone	Shopper	Allow access to B2C Commerce features.	Commerce User
Clone	Survey Creator	Lets a user create, edit, and delete Surveys.	Survey Creator User - 1 Seats

Utility Bar Component

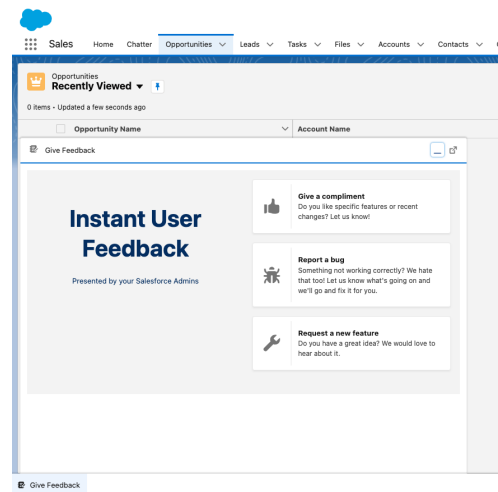
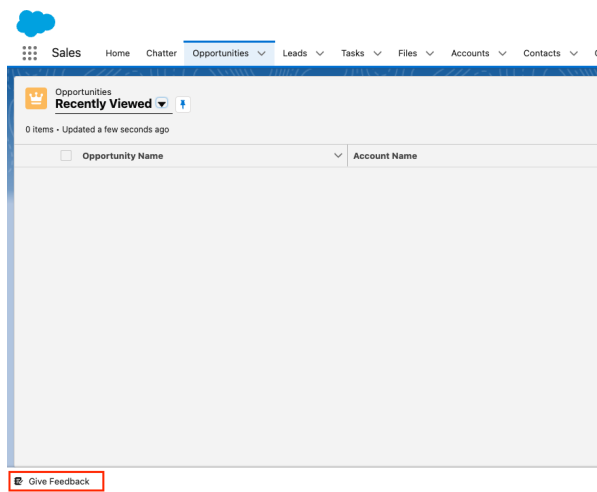
The Instant User Feedback functionalities are available as a Utility Bar Component. To use it, add it to the Utility Bar.



For optimal result, use at least 800px width and 600px height:

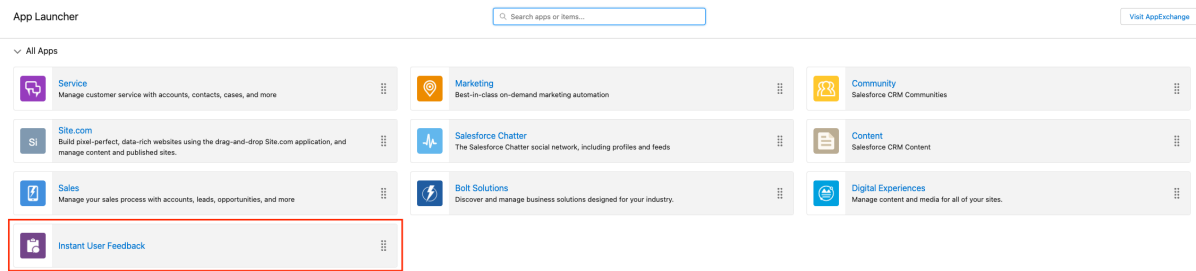


Users can now start the Instant User Feedback app from the Utility Bar:

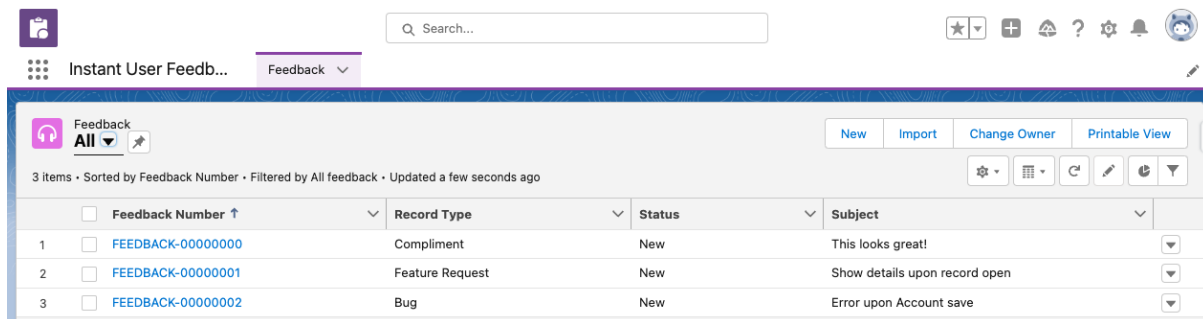


Instant User Feedback Lightning App

This Lightning App is the home for all Feedback Records. It can be opened from the App Launcher:

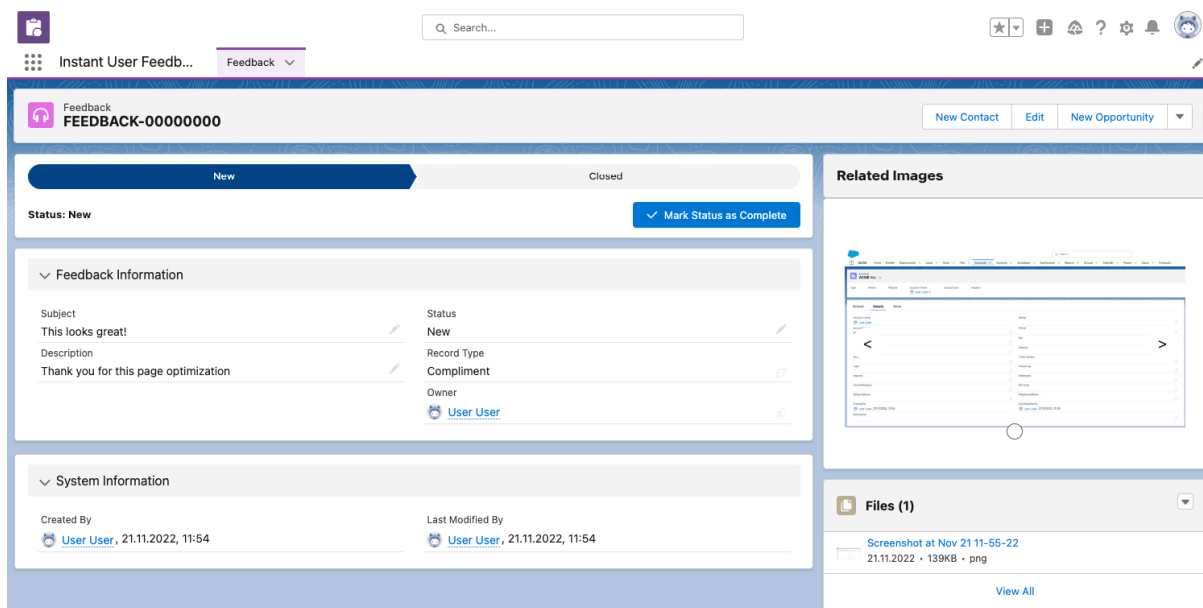


It contains a Custom Tab for the Feedback Records with a list view that displays all Feedback Records.

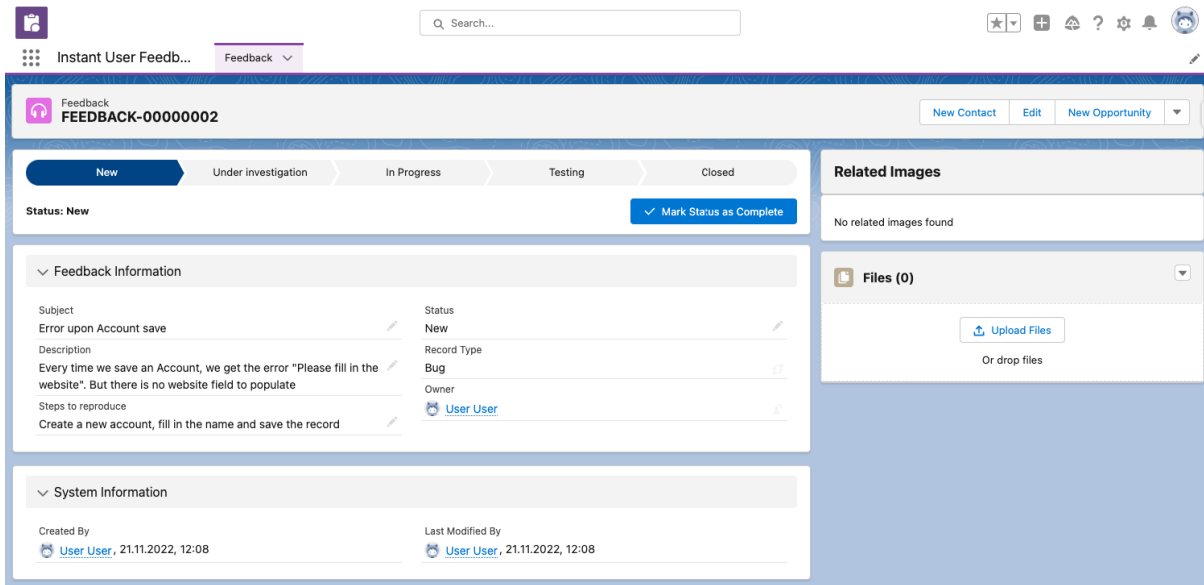


The Feedback Detail Page contains a Dynamic Form that only displays the relevant data. If there is no link to a Salesforce record, the section "Related Record Information" is hidden. The "Related Images" component on the page shows a preview of the images that are related to the Feedback record.

Example of a Compliment:



Example of a Bug:



The screenshot shows a bug report form for 'FEEDBACK-00000002'. The status is 'New'. The form includes sections for Feedback Information, System Information, and Related Images. The feedback information section contains details about an error upon account save, with a description and steps to reproduce. The system information section shows the record was created and last modified by 'User User' on 21.11.2022 at 12:08. The related images section shows no related images found.

Feedback Information

Subject	Error upon Account save	Status	New
Description	Every time we save an Account, we get the error "Please fill in the website". But there is no website field to populate	Record Type	Bug
Steps to reproduce	Create a new account, fill in the name and save the record	Owner	User User

System Information

Created By	User User, 21.11.2022, 12:08	Last Modified By	User User, 21.11.2022, 12:08
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Related Images

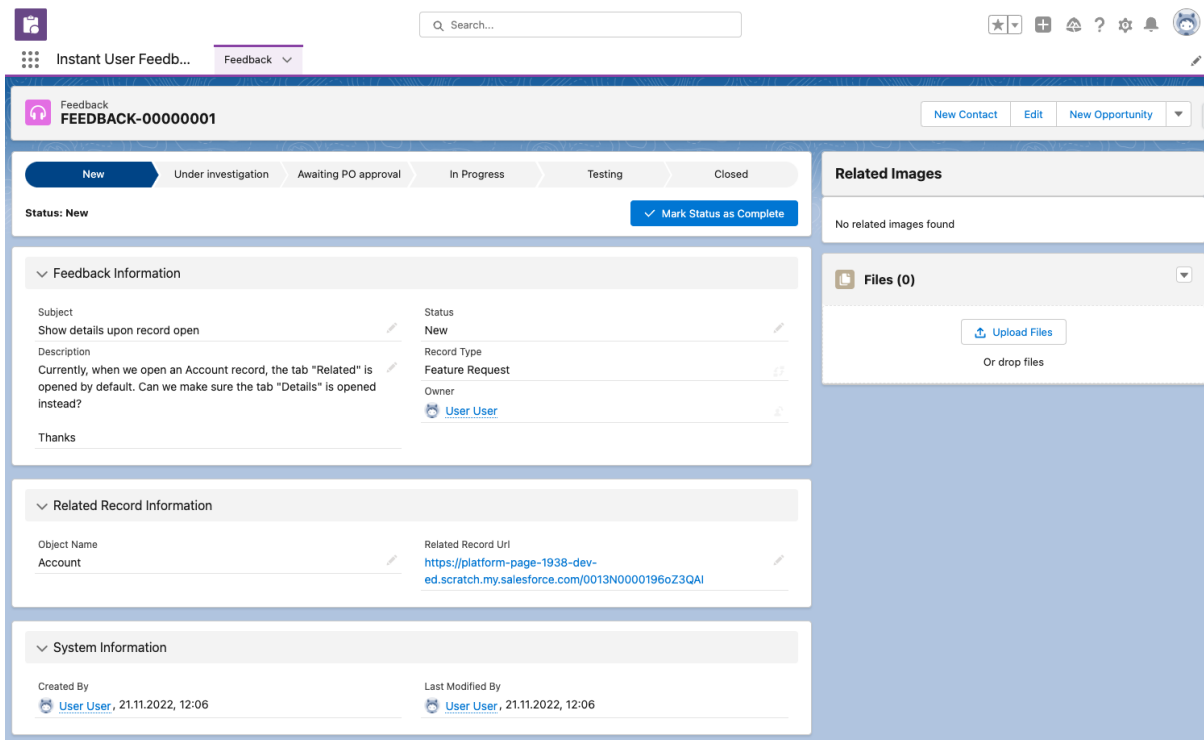
No related images found

Files (0)

Upload Files

Or drop files

Example of a Feature Request with related record information:



The screenshot shows a feature request form for 'FEEDBACK-00000001'. The status is 'New'. The form includes sections for Feedback Information, Related Record Information, and System Information. The feedback information section contains details about a feature request to show details upon record open. The related record information section shows the object name 'Account' and the related record URL. The system information section shows the record was created and last modified by 'User User' on 21.11.2022 at 12:06. The related images section shows no related images found.

Feedback Information

Subject	Show details upon record open	Status	New
Description	Currently, when we open an Account record, the tab "Related" is opened by default. Can we make sure the tab "Details" is opened instead?	Record Type	Feature Request
Thanks		Owner	User User

Related Record Information

Object Name	Account	Related Record Url	https://platform-page-1938-dev-ed.scratch.my.salesforce.com/0013N0000196oZ3QA
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System Information

Created By	User User, 21.11.2022, 12:06	Last Modified By	User User, 21.11.2022, 12:06
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Related Images

No related images found

Files (0)

Upload Files

Or drop files