

FD - [CORE] In-App Guidance

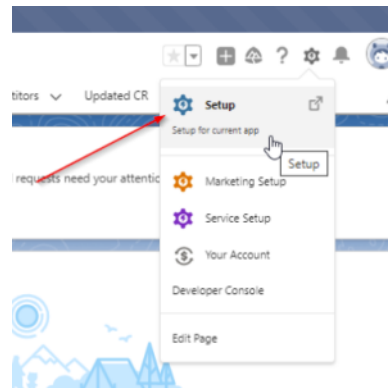
For Pricing we are in Pilot for In-App Guidance. Product Owners can manage in UAT and in Production the In-App Guidance

[Salesforce InApp Guidance Process - Solvay - Google Slides](#)

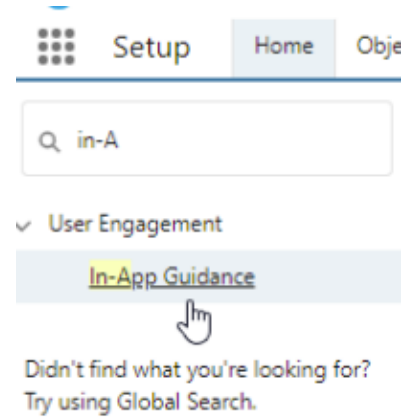
The permission set that allow management of in App Guidance is : "*Manage Prompt*"

1/ How to Access In-App Guidance menu

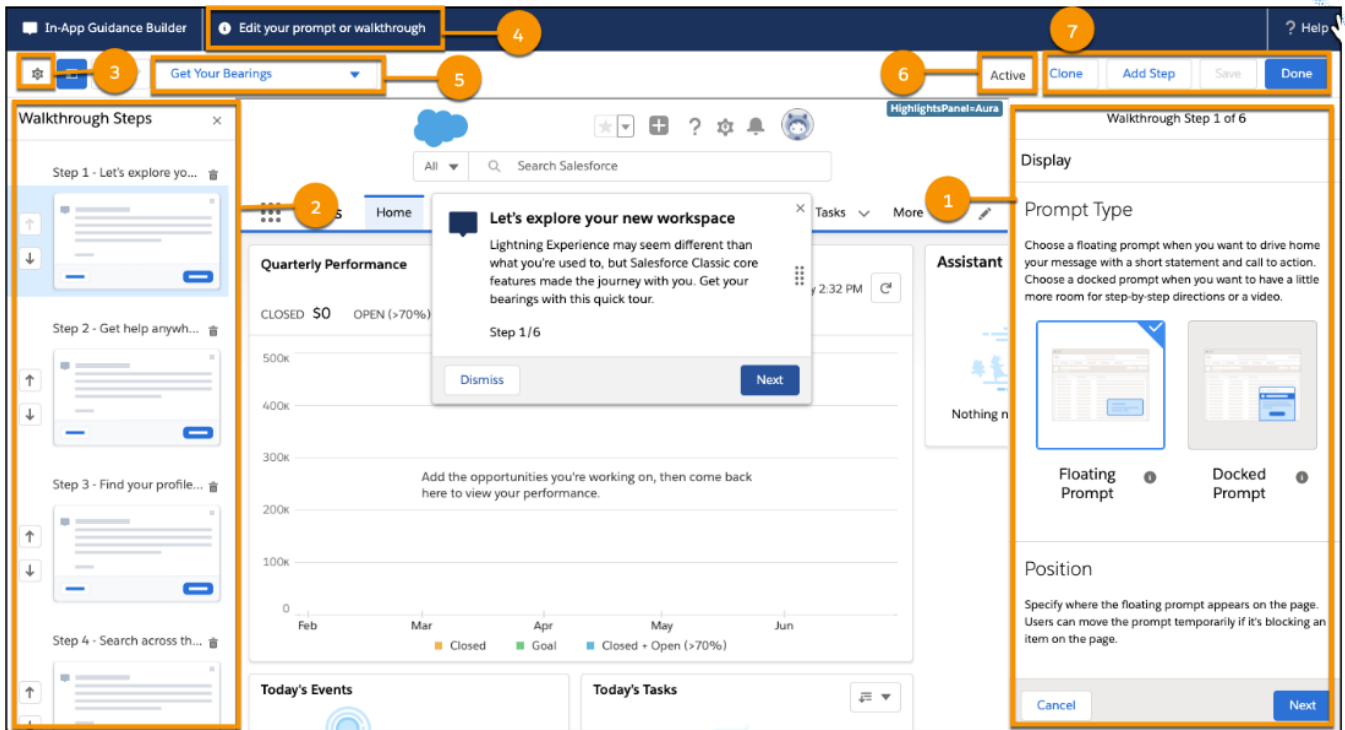
1 - Access the Salesforce Setup



2 - Access *In-App Guidance* menu



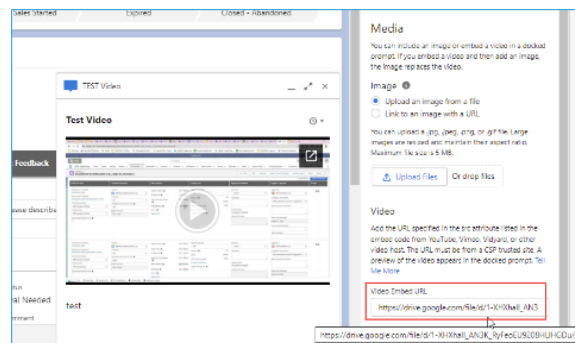
2/ How to use it



1. Specify the in-app guidance type, prompt type and position, and content.
2. Review, move, and delete steps in a walkthrough.
3. Edit additional settings such as action button and links, profile, user permissions, schedule, active status, and name details.
4. Use the buttons to guide you through the builder.
5. See what other in-app guidance is on the current page.
6. Indicates if the in-app guidance is active or inactive.
7. The buttons change as you are adding, editing, or previewing the in-app guidance. Some common buttons are Clone, Add Step, Save, and Done. By clicking Save, you save any changes that you made. By clicking Done, you close the sidebars to restart at the add screen.
8. Preview in-app guidance in your app so you can place it where you want in the app. After you start authoring in-app guidance, you'll see a preview of the prompt and walkthrough as you customize it. Some org interactions, such as editing a page layout and switching to Salesforce Classic, aren't available inside of the canvas.

3/ Videos

Unable to locate Jira server for this macro. It may be due to Application Link configuration.

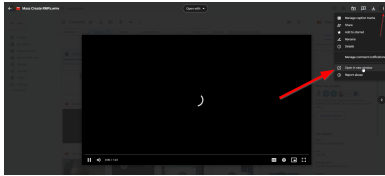


- You can add video on "Docked Prompt".
- They have to be stored in a Solvay Google drive and accessible from the user.

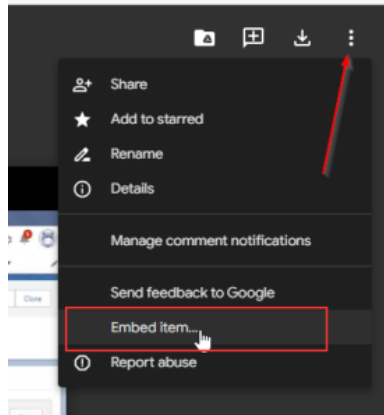
On the Videosection , add the link.

To get the link to the video follow those 3 steps :

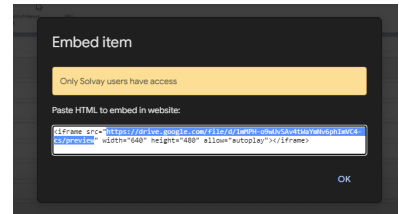
1/ Open in a new Window



2/ Select "Embed item..."



3/ Copy the whole URL from the "src" tag



Example of code :

```
<iframe src="https://drive.google.com/file/d/1KBkVLj-slf3mw8a3tOe8BdMU2VdM5eAB/preview" width="640" height="480" allow="autoplay"></iframe>
```