In-App Guidance Quick Start Guide

Spring 2021

FINANCIALFORCE

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PURPOSE OF THIS DOCUMENTATION

This documentation is intended to walk you through the process of getting up and running quickly with user engagement prompts once FinancialForce has installed the latest package. This document provides a simple method of getting up and running quickly.

User engagement prompts are available for the following FinancialForce products:

- FinancialForce Accounting
- Revenue Management
- Billing Central
- Professional Services Automation

This document will provide you with a high-level introduction to user engagement prompts in Salesforce, including how to:

- Control visibility.
- Activate and deactivate.
- Clone and customize prompts.

To learn more, including how to create your own prompts, we recommend that you read the Salesforce In-App Guidance in Lightning Experience help topic, which can be found here.

GETTING STARTED

The FinancialForce user engagement prompts use the Salesforce In-App Guidance feature to deliver FinancialForce content such as tutorials and learning paths directly from our applications. As Salesforce delivers further user engagement features, FinancialForce will leverage their capabilities in order to make the adoption and use of our products a far simpler experience for our customers.

You can see a full listing of all of the FinancialForce user engagement prompts here.

Most user engagement prompts setup and work is carried out in **User Engagement** within **Salesforce Setup**.

REVIEWING PROMPTS

Prompts will automatically be added to your sandbox or production org when you upgrade to Spring 2021. To review the prompts that have been added to your org, follow these steps:

1. Go to **Setup | User Engagement | In-App Guidance.** You can scroll through the list of all of the prompts on your org.
    - The Package column indicates prompts that were added by a managed package (e.g. FinancialForce PS Enterprise).
    - The App column indicates the app that the prompt is associated with (for example, Accounting, PSA).
    - The Active column indicates whether a prompt is active which makes it visible to users, or inactive.

TESTING AND PREVIEWING PROMPTS

You can test prompts to preview how they will appear to users in the FinancialForce applications. You can also preview individual prompts.

TESTING PROMPTS

To test the prompts in your org:

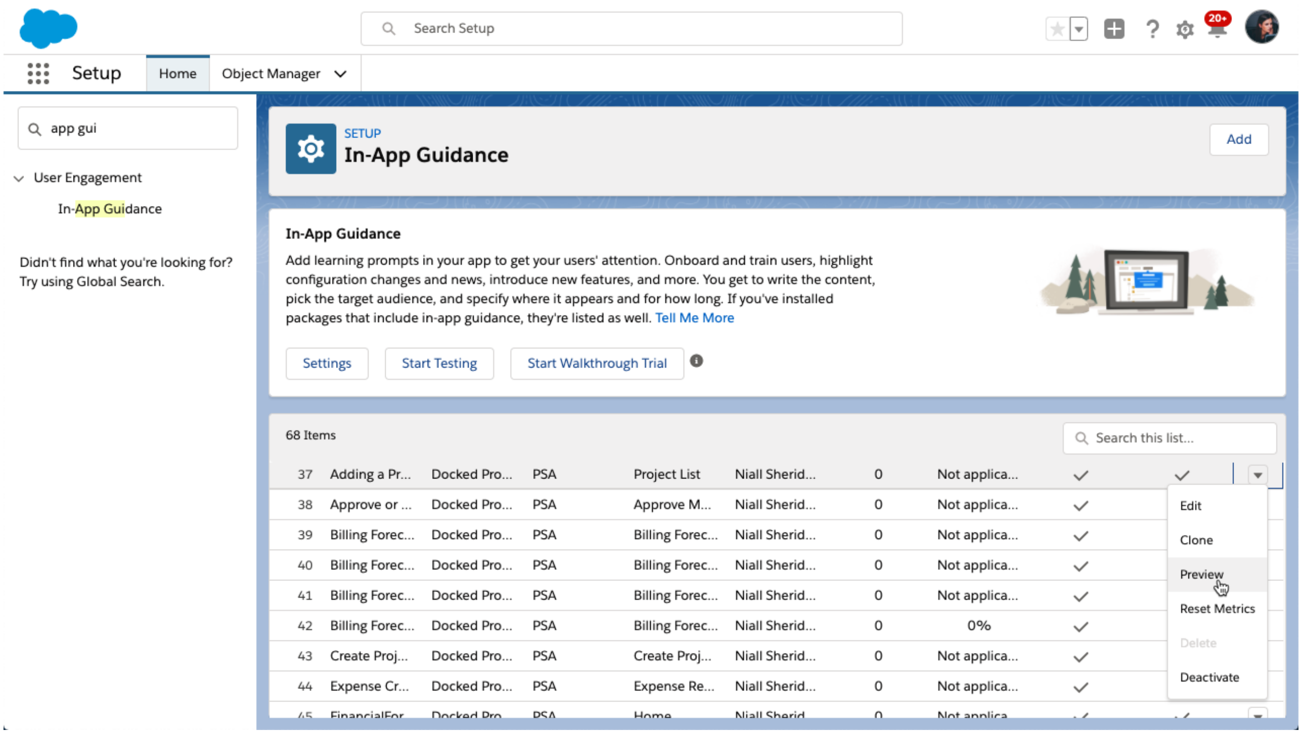
1. Go to **Setup | User Engagement | In-App Guidance.**
2. Click **Start Testing.**
3. Select the Application you want to test using the **App Launcher** (for example, Accounting, PSA).
4. Open the tab you want to test. All prompts for that tab appear sequentially.
5. Click **Exit Testing** when you have finished testing prompts.
6. Click **Exit** to confirm**.**

PREVIEWING PROMPTS

To preview an individual prompt on your org:

1. Go to **Setup | User Engagement | In-App Guidance.**

2. Find the prompt you want to preview and click **Preview** using the Dropdown Menu to preview the prompt in the relevant app and tab.



3. Click **Done** when you have finished previewing the prompt**.**

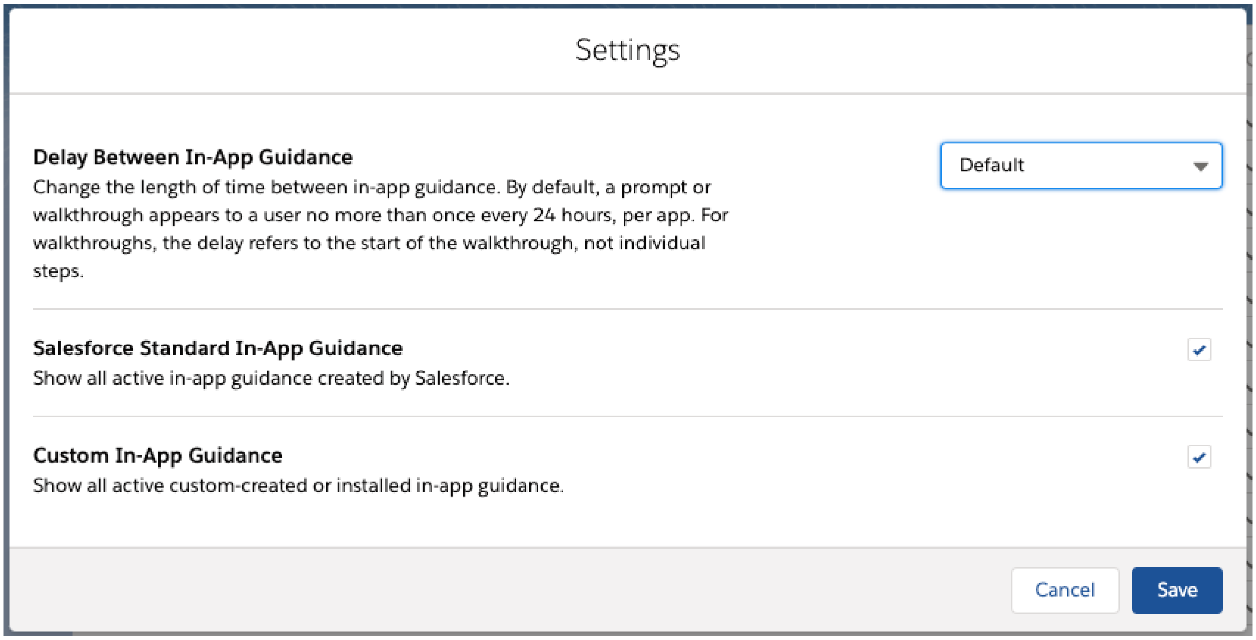
CONFIGURING PROMPT SETTINGS

The Settings menu enables you to set the delay between in-app guidance prompts, and control the visibility of Salesforce standard in-app guidance prompts and custom in-app guidance prompts, including the packaged FinancialForce user engagement prompts.

To edit the prompts settings

1. Go to **Setup | User Engagement | In-App Guidance.**
2. Click **Settings** to open the **Settings** dialog box. From this dialog you can edit the following values:
    a. Delay Between In-App Guidance: the length of time, in hours and minutes, between in-app guidance. By default, a prompt or walkthrough appears to a user no more than once every 24 hours, per app.
    b. Salesforce Standard In-App Guidance: show all active in-app guidance created by Salesforce.
    c. Custom In-App Guidance: show all active custom-created or installed in-app guidance.

3. Click **Save.**



MANAGING PROMPTS

You can manage prompts using the following actions:

- Activate and deactivate.
- Clone and customize.
- Amend packaged prompts.
- Control the visibility or prompts to your users and how often prompts appear.

ACTIVATING AND DEACTIVATING PROMPTS

By default, most FinancialForce user engagement prompts are set to inactive. Review the prompts in your org, or, see the full listing of all of the FinancialForce user engagement prompts at the end of this document for a full listing of every prompt and its active status.

Depending on your business needs you should activate or deactivate the FinancialForce prompts as needed.

ACTIVATING PROMPTS

To activate a prompt on your org:

1. Go to **Setup | User Engagement | In-App Guidance.**
2. Find the FinancialForce prompt you want to activate and click the **Activate** button using the **Dropdown Menu**.

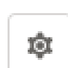
DEACTIVATING PROMPTS

To deactivate a prompt on your org:

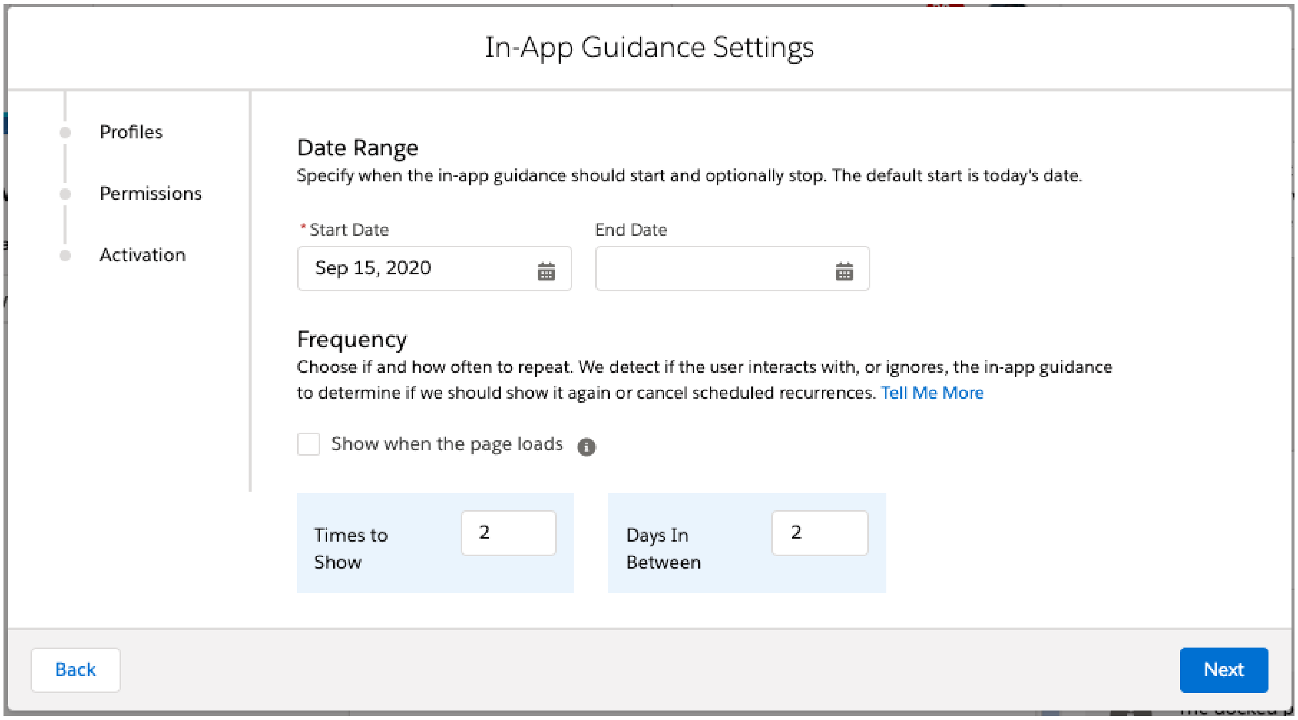
1. Go to **Setup | User Engagement | In-App Guidance.**
2. Find the FinancialForce prompt you want to deactivate and click **Deactivate using** the **Dropdown Menu.**

CLONING AND CUSTOMIZING PROMPTS

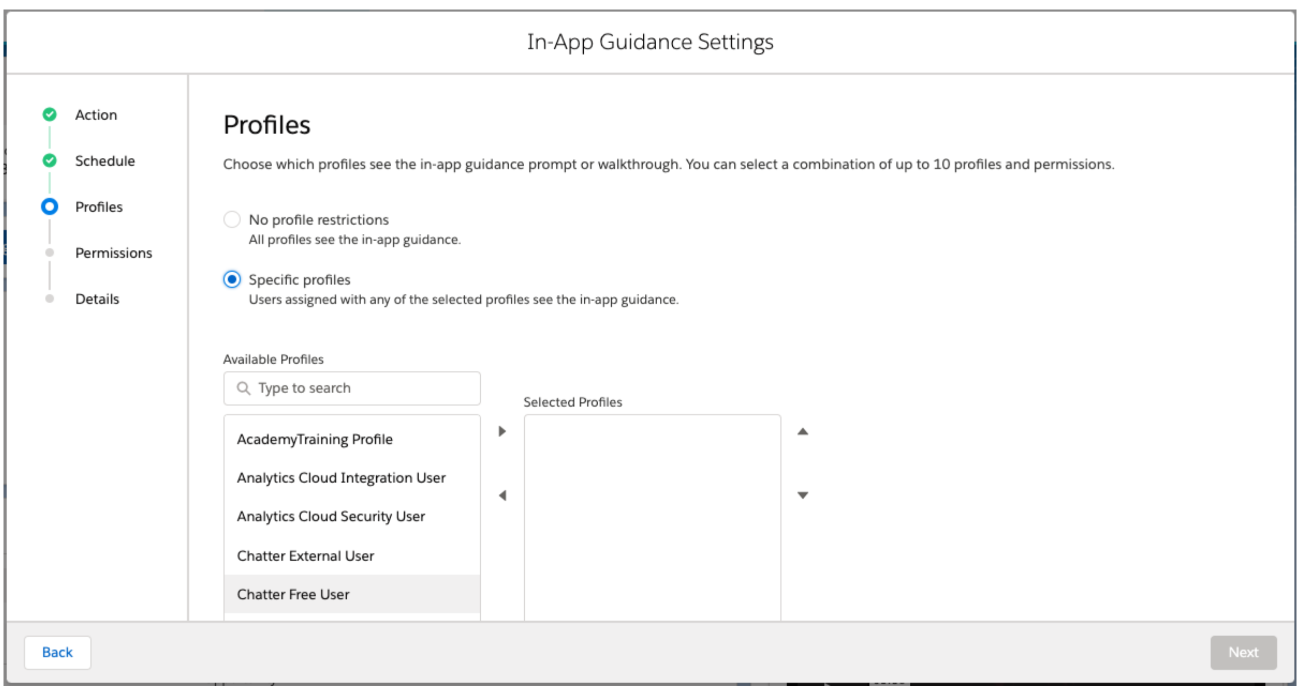
Depending on your business needs you may want to customize the packaged FinancialForce prompts. You can clone a FinancialForce prompt and then edit the content, date range etc. of this copy. To clone a prompt and edit the clone:

1. Go to **Setup | User Engagement | In-App Guidance.**
2. Find the FinancialForce prompt you want to clone and click **Clone** using the the Dropdown Menu.
3. If you want to display the prompt on a different app or tab, select the app and tab.
4. Click **Next.**
5. **Edit** the fields displayed according to your requirements.
6. Click **Save.**
7. To edit your prompt settings click the  in the top left corner of the screen. You can edit the following values:
    a. Action: **Add** or **Edit** an action button for your selected prompt.

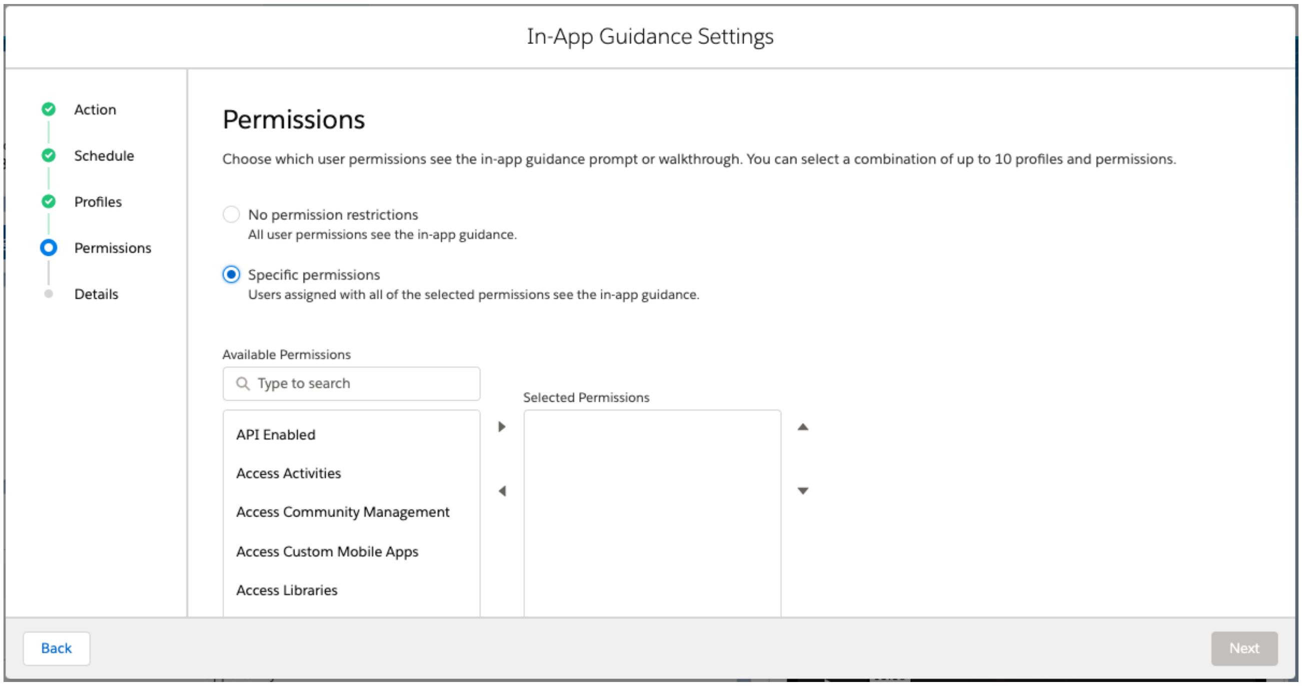
b. Schedule: Select a date range for the in-app guidance to appear. Then, select the frequency.



c. Profiles: Select the profiles to receive in-app guidance prompt.



   d. Permissions: Select which user permissions to receive in-app guidance prompt.



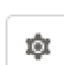
   e. Activation: Add or edit the Name, API Name and Description fields, and select the **Active** checkbox to activate the prompt.

8. Click **Done.**
9. Click **Save.**
10. Click **Done.**

Note: Remember to deactivate the managed FinancialForce prompt that you cloned if it has already been activated.

EDITING PROMPTS

Depending on your business needs you may want to amend the schedule and visibility of FinancialForce in-app guidance prompts to users, using profiles or permissions. To do this:

1. Go to **Setup | User Engagement | In-App Guidance.**
2. Find the FinancialForce prompt you want to edit and click **Edit** using the Dropdown Menu.
3. To edit your prompt settings click the  in the top left corner of the screen. You can edit the following values:
   a. Schedule: Select a date range for the in-app guidance to appear. Then, select the frequency.
   b. Profiles: Select the profiles to receive the in-app guidance prompt.

c. Permissions: Select the permissions to receive the in-app guidance prompt.
d. Activation: Select the **Active** checkbox to activate or deactivate the prompt.
4. Click **Done.**
5. Click **Save.**
6. Click **Done.**

PROMPT LISTING

- Prompts listed under NEW PROMPTS were added in this release.
- Prompts listed under UPDATED PROMPTS have been updated in this release.
- Prompts listed under OTHER PROMPTS were added in a previous release and are unchanged in this release.

ACCOUNTING

NEW PROMPTS

Name	App	Tab	Type	Active
Creating a Currency Revaluation Template	Accounting	Currency Revaluation Template (List)	Tutorial	No
Generating Currency Revaluation Documents	Accounting	Currency Revaluation Criteria (List)	Tutorial	No
Multi-Company Revaluation Redirect	Accounting	Currency Revaluation	Other	Yes
Update fields for closing Periods	Accounting	Periods (List)	Help	No

UPDATED PROMPTS

Name	App	Tab	Type	Active
Accounting Audit File	Accounting	Accounting Companies (Record)	Tutorial	No
Application Design Concepts LP	Accounting	Select Company	Learning Path	Yes
Currency Revaluation and Translation LP	Accounting	Currency Revaluation	Learning Path	No
Release Overview	Accounting	Select Company	Tutorial	Yes

OTHER PROMPTS

Name	App	Tab	Type	Active
About Accounting Books	Accounting	Accounting Books (List)	Tutorial	No

Chart of Accounts Localization	Accounting	Chart of Accounts Localization	Tutorial	No
Collections Plus Configuring Customer Statement Rules	Accounting	Customer Statement Rules (List)	Tutorial	No
Collections Plus Configuring Reminder Rules	Accounting	Reminder Rules (List)	Tutorial	No
Collections Plus LP	Accounting	Collections	Learning Path	Yes
Collections Plus Sending Email Reminders	Accounting	Collections	Tutorial	No
Combination Rules Configuring Combination Rules	Accounting	Combination Rules Setup	Tutorial	No
Configuring Prepaid Expenses	Accounting	Prepaid Expenses Schedule Definition (List)	Tutorial	No
Creating Prepaid Expenses Journals	Accounting	Prepaid Expenses	Tutorial	No
Cross Company Allocations	Accounting	Allocations (List)	Tutorial	No
Currency Revaluation	Accounting	Currency Revaluation (List)	Tutorial	No
Introduction to Journals LP	Accounting	Journals (List)	Learning Path	Yes
Journal Loader	Accounting	Journal Loader	Tutorial	No
Separate Payments per PIN	Accounting	Payments Plus	Tutorial	No
Types of Balance (Record)	Accounting	Accounting Task Launcher	Tutorial	No
Using Accounting Books	Accounting	Journal (List)	Tutorial	No

PROFESSIONAL SERVICES AUTOMATION

NEW PROMPTS

Name	App	Tab	Type	Active
Assignment Rescheduling	PSA	Assignment (Record)	Tutorial	No
Change Requests	PSA	Opportunities (Record)	Tutorial	No
Closing Assignments	PSA	Projects (Record)	Tutorial	No
Create Rate Card Sets	PSA	Rate Card Set (List)	Tutorial	No
Mass Approval Expense Report Approvals VF	PSA	Approve Multiple Expense Reports	Tutorial	No
Mass Approval Expense Report VF	PSA	Expense Reports (List)	Tutorial	No
Mass Approval Timecards Approvals VF	PSA	Approve Multiple Timecards	Tutorial	No
Mass Approval Timecards VF	PSA	Timecards (List)	Tutorial	No
Project Billing	PSA	Projects (Record)	Tutorial	No
Project Template Actions	PSA	Projects (Record)	Tutorial	No
Project Template LP	PSA	Opportunities (Record)	Learning Path	Yes
Project Template LP CPFT	PSA	Create Project From a Template	Learning Path	Yes
Rate Card Set Discount	PSA	Projects (Record)	Tutorial	No
Resource Request Sets	PSA	Resource Requests (List)	Tutorial	No
Services Revenue Forecasting Workspace	PSA	Services Revenue Forecasting Workspace	Tutorial	No

UPDATED PROMPTS

Name	App	Tab	Type	Active
Release Overview	PSA	Home	Tutorial	Yes
Resource Requests Page	PSA	Resource Requests (Record)	Tutorial	No
Time Entry Lightning Component	PSA	Time Entry	Tutorial	No

OTHER PROMPTS

Name	App	Tab	Type	Active
Add Project Tasks From Template	PSA	Projects (Record)	Tutorial	No
Approve or Reject Timecards	PSA	Approve Multiple Timecards	Tutorial	No
Billing Forecasting - Running a Forecast	PSA	Billing Forecast Calculations (List)	Tutorial	No
Billing Forecasting - Setting up Billing Forecasts	PSA	Billing Forecast Setup	Tutorial	No
Billing Forecasting - Setting up Forecast Curves	PSA	Billing Forecast Curves (List)	Tutorial	No
Billing Forecasting - Viewing a Forecast and Overrides	PSA	Billing Forecast Calculation (Record)	Tutorial	No
Concurrent Billing Processes	PSA	Billing Event Generation	Tutorial	No
Expense Creation and Submission	PSA	Expense Report (List)	Tutorial	No
Gantt Usability Improvements	PSA	Gantt	Tutorial	No
Multiple Expense Entry	PSA	Multiple Expense Entry UI	Tutorial	No
Project & Resource Manager Workspace	PSA	Project Manager Workspace	Tutorial	No
Project Billing Cap	PSA	Projects (List)	Tutorial	No
Revenue Forecasting - Reviewing a Forecast Version	PSA	Review Forecast Version	Tutorial	No
Revenue Forecasting - Setting up Revenue Forecasts	PSA	Revenue Forecast Setup	Tutorial	No

BILLING CENTRAL

NEW PROMPTS

Name	App	Tab	Type	Active
Billing Customers and Calculating Tax Learning Path	Billing Central	Billing Documents (List)	Learning Path	Yes

UPDATED PROMPTS

Name	App	Tab	Type	Active
Release Overview	Billing Central	Accounts (List)	Tutorial	Yes

OTHER PROMPTS

Name	App	Tab	Type	Active
Charge Terms	Billing Central	Billing Contract (Record)	Tutorial	No
Company Default Tax Calculation	Billing Central	Foundation Company (Record)	Tutorial	No
Creating a Consolidation Grouping Method	Billing Central	Consolidation Grouping Method (List)	Tutorial	No
Creating a Consolidation Rule, (Record) Filter, and Grouping Method	Billing Central	Consolidation Rules (List)	Tutorial	No
Creating a Contract Manually	Billing Central	Billing Contracts (List)	Tutorial	No
Creating and Deleting Soft Dates	Billing Central	BC Task Launcher	Tutorial	No
Creating Billing Documents from Contracts	Billing Central	Billing Contract (Record)	Tutorial	No
Creating Plans	Billing Central	Plans (List)	Tutorial	No
Creating, Editing and Deleting Discounts	Billing Central	Discounts (List)	Tutorial	No
Managing Contracts Learning Path	Billing Central	Billing Contracts (List)	Learning Path	Yes

Products Learning Path	Billing Central	Products (List)	Learning Path	Yes
Setting up Pricing Structures on Price Books	Billing Central	Pricing Structures (List)	Tutorial	No

REVENUE MANAGEMENT

UPDATED PROMPTS

Name	App	Tab	Type	Active
Release Overview	Revenue Management	Recognize Revenue	Tutorial	Yes

OTHER PROMPTS

Name	App	Tab	Type	Active
Accounting Journal Integration	Revenue Management	Revenue Recognition Transactions (List)	Tutorial	No
Configuring Revenue Recognition LP	Revenue Management Setup	Settings (List)	Learning Path	Yes
Configuring Summarization Criteria	Revenue Management	Revenue Recognition Transactions (Record)	Tutorial	No
Recognition Views Tutorial	Revenue Management Setup	Recognition Views (List)	Tutorial	No
Recognize All Tutorial	Revenue Management	Recognize Revenue	Tutorial	No
Recognize Revenue LP	Revenue Management	Recognize Revenue	Learning Path	Yes
Revenue Contracts LP	Revenue Management	Revenue Contracts (List)	Learning Path	Yes
Settings Tutorial	Revenue Management Setup	Settings (List)	Tutorial	No
Templates Tutorial	Revenue Management Setup	Templates (List)	Tutorial	No
Updated Forecast Filters	Revenue	Forecast Revenue	Tutorial	No

	Management			
Years and Periods Tutorial	Revenue Management Setup	Recognition Years (List)	Tutorial	No

FINANCIAL REPORT BUILDER

NEW PROMPTS

Name	App	Tab	Type	Active
Getting Started with Financial Report Builder	FRB	Financial Statements (List)	Product Walkthrough	No
Getting Started with Financial Report Builder	FRB	Reports (List)	Product Walkthrough	No