



Configure MyGuide by EdCast

# Step: 01

## Welcome to MyGuide

In this Guide, we will learn how to configure MyGuide by EdCast in Salesforce Lightning

The screenshot displays the Salesforce Lightning dashboard interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below the navigation bar, the dashboard is divided into several sections:

- Quarterly Performance:** A line chart showing performance from April to June. The Y-axis ranges from 0 to 4.5M. A horizontal goal line is set at approximately 3.6M. The current performance is shown as a blue line that is below the goal line. A tooltip is visible over the chart with the text: "Welcome to MyGuide. In this Guide, we will learn how to configure MyGuide by EdCast in Salesforce Lightning." Above the chart, the text reads: "CLOSED \$3,135,000 OPEN (>70%) \$665,000 GOAL --".
- Assistant:** A section on the right side of the dashboard with a blue background and a tree icon. It contains the text: "Nothing needs your attention right now. Check back later."
- Today's Events:** A section on the bottom left with a blue background and a sun icon. It contains the text: "Looks like you're free and clear the rest of the day."
- Today's Tasks:** A section on the bottom right with a blue background and a task icon. It contains the text: "Nothing due today. Be a go-getter, and check back soon." Below this text is a "View All" link.

# Step: 02

Click the gear cog

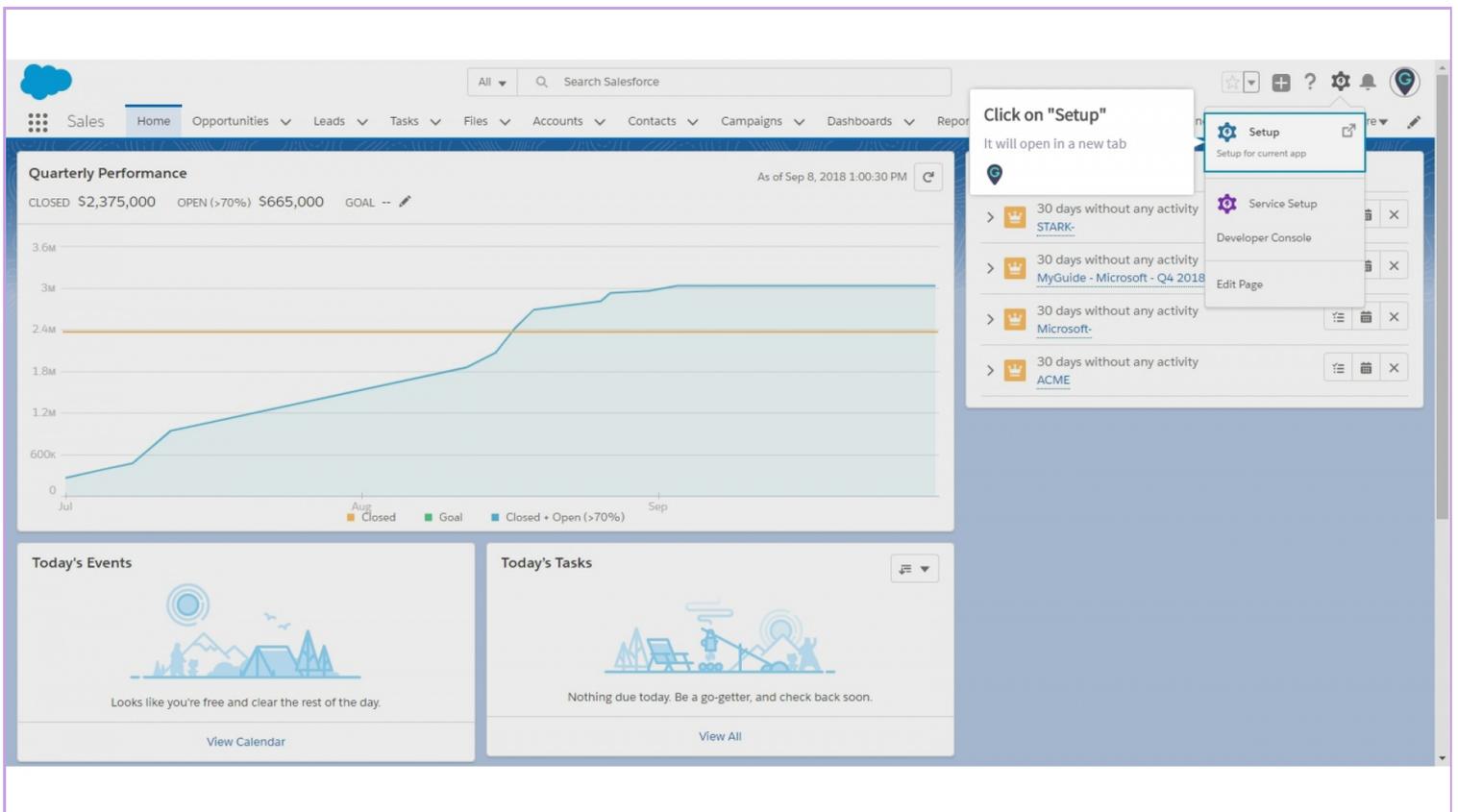
The screenshot shows a Salesforce dashboard interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various utility icons. A tooltip with the text "Click the gear cog" points to the gear icon in the top right corner. Below the navigation bar, the main dashboard area is divided into several sections:

- Quarterly Performance:** A line chart showing sales performance from July to September. The y-axis ranges from 0 to 3.6M. A horizontal goal line is set at 2.4M. The chart shows a steady increase in sales, crossing the goal line in late August. Summary statistics: CLOSED \$2,375,000, OPEN (>70%) \$665,000, GOAL --.
- Today's Events:** A section with a calendar icon and the text "Looks like you're free and clear the rest of the day." with a "View Calendar" link.
- Today's Tasks:** A section with a task icon and the text "Nothing due today. Be a go-getter, and check back soon." with a "View All" link.
- Assistant:** A sidebar on the right showing a list of reminders, each with a crown icon and a close button. The reminders are: "30 days without any activity STARK-", "30 days without any activity MyGuide - Microsoft - Q4 2018", "30 days without any activity Microsoft-", and "30 days without any activity ACME".

# Step: 03

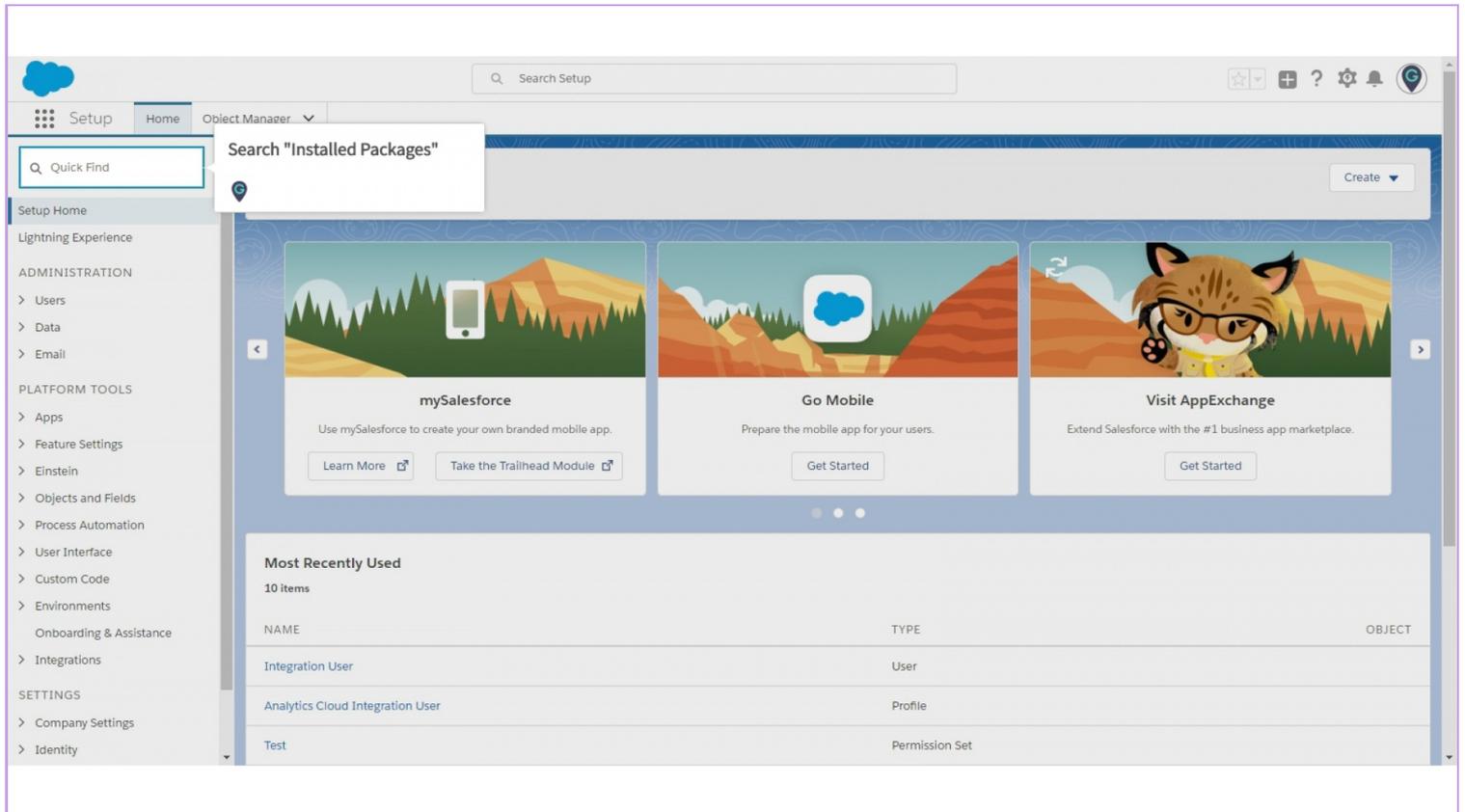
## Click on "Setup"

It will open in a new tab



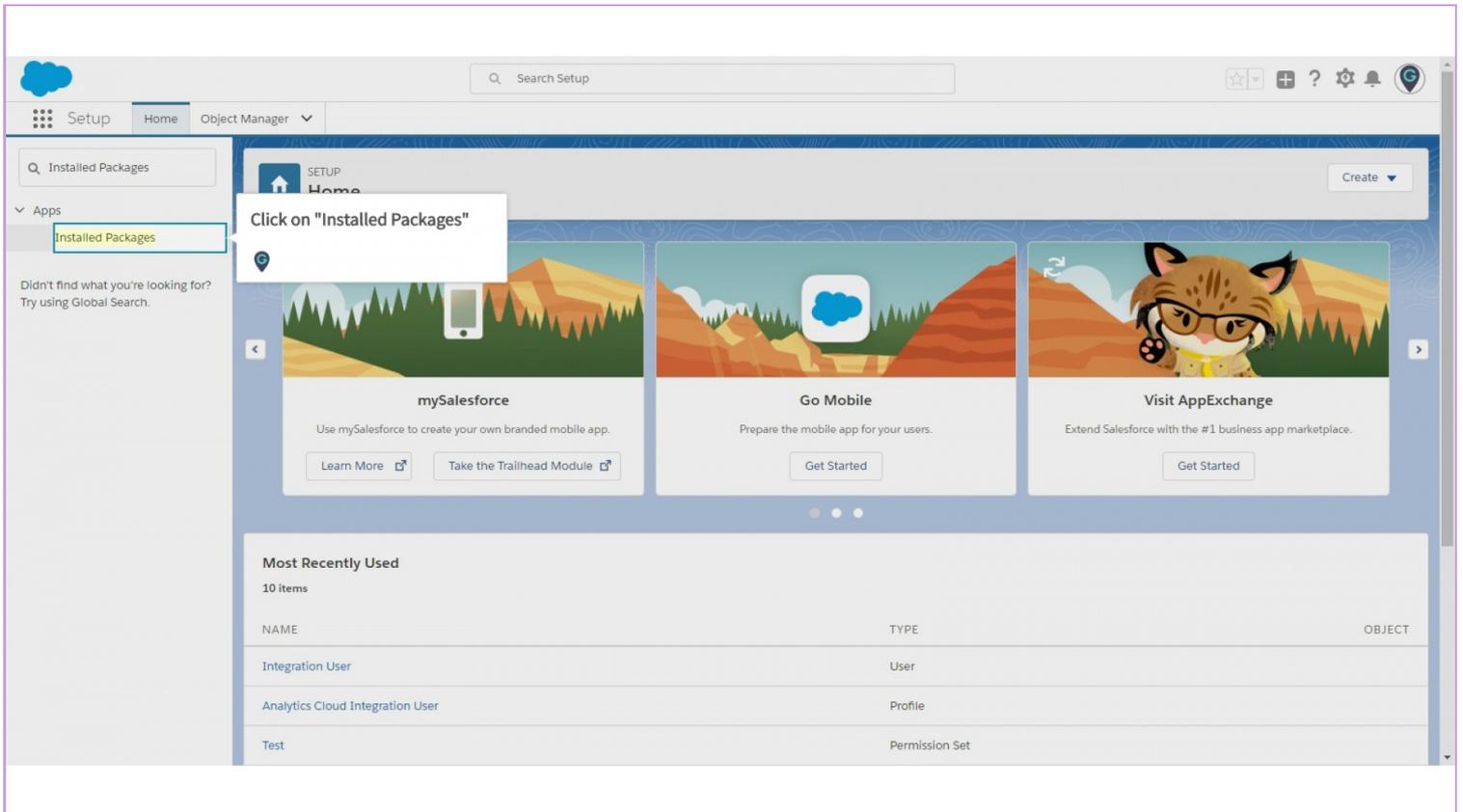
# Step: 04

## Search "Installed Packages"



## Step: 05

Click on "Installed Packages"



The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar for 'Installed Packages' and a list of navigation options under 'Apps', with 'Installed Packages' highlighted. A callout box with the text 'Click on "Installed Packages"' points to this link. The main content area displays three featured cards: 'mySalesforce', 'Go Mobile', and 'Visit AppExchange'. Below these is a 'Most Recently Used' section with a table of 10 items.

NAME	TYPE	OBJECT
Integration User	User	
Analytics Cloud Integration User	Profile	
Test	Permission Set	

# Step: 06

## Click on "Configure"

The screenshot shows the Salesforce Setup interface. The main heading is "Installed Packages". Below the heading, there is a table with the following data:

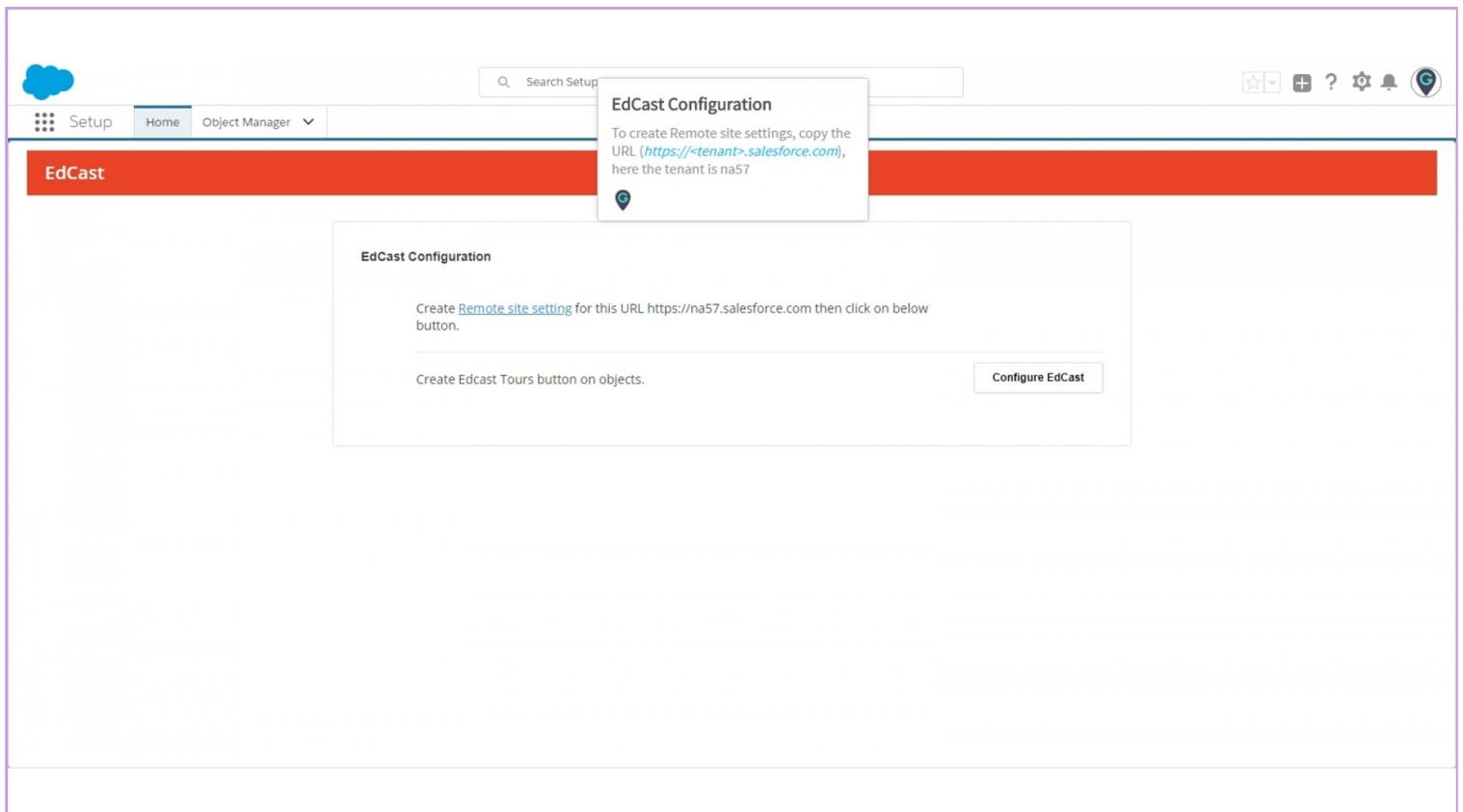
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall <a href="#">Configure</a>	<a href="#">EdCast for Salesforce</a>	EdCast	2.12	edcast	9/20/2018 1:57 AM	<input type="checkbox"/>	1	2	2	Passed

A callout box with a location pin icon and the text "Click on 'Configure'" points to the "Configure" link in the table row.

## Step: 07

# EdCast Configuration

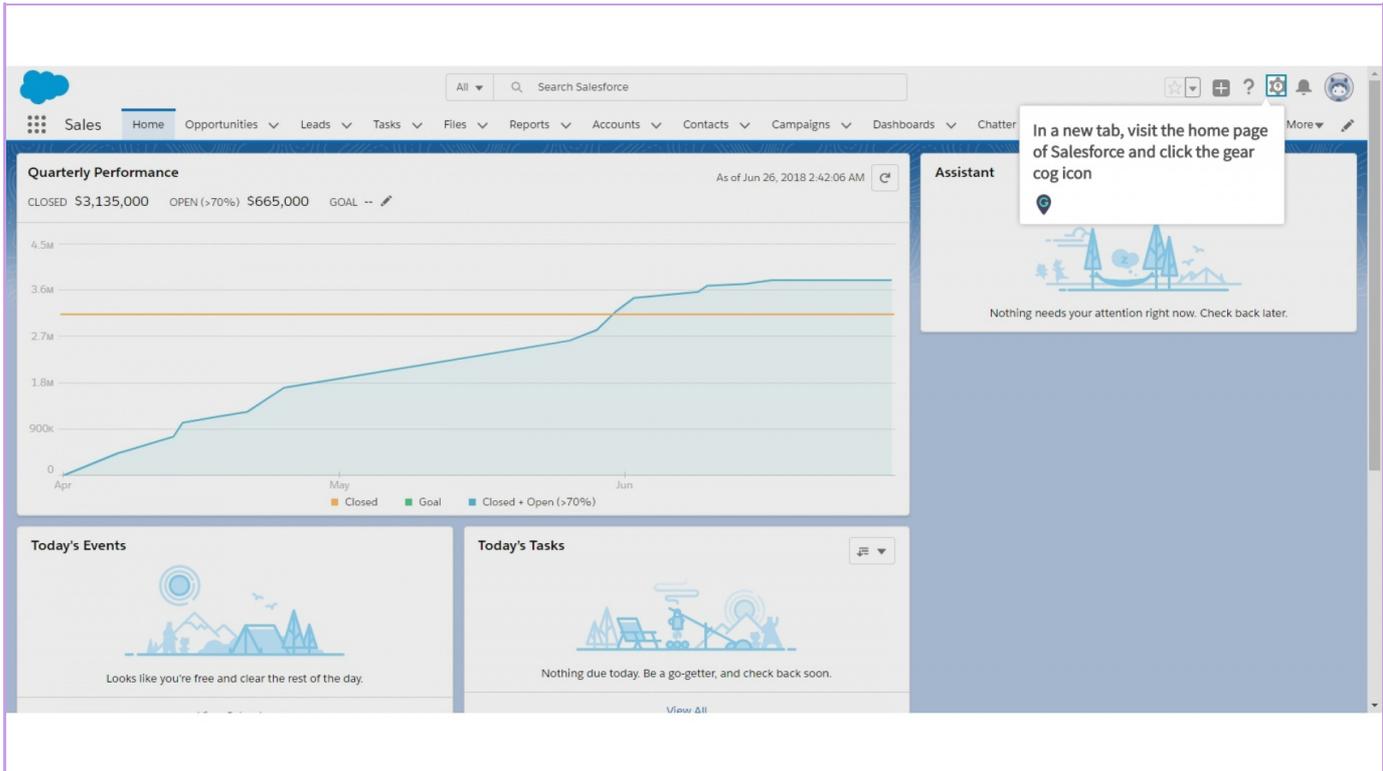
To create Remote site settings, copy the URL (<https://<tenant>.salesforce.com>), here the tenant is na57



The screenshot shows the Salesforce Setup interface. At the top, there is a navigation bar with the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the "EdCast" section is highlighted in red. A modal window titled "EdCast Configuration" is open, displaying instructions: "To create Remote site settings, copy the URL (<https://<tenant>.salesforce.com>), here the tenant is na57". Below the instructions, there is a "Configure EdCast" button. The main content area of the page contains a section titled "EdCast Configuration" with the following text: "Create [Remote site setting](#) for this URL <https://na57.salesforce.com> then click on below button." and "Create EdCast Tours button on objects." with a "Configure EdCast" button.

## Step: 08

In a new tab, visit the home page of Salesforce and click the gear cog icon



The screenshot displays the Salesforce home page dashboard. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various menu items like Sales, Home, Opportunities, Leads, Tasks, Files, Reports, Accounts, Contacts, Campaigns, Dashboards, and Chatter. The main content area is divided into several sections:

- Quarterly Performance:** A line chart showing sales performance from April to June. The y-axis ranges from 0 to 4.5M. The x-axis shows months: Apr, May, and Jun. A horizontal orange line represents the goal at approximately 3.6M. The blue line representing 'Closed + Open (>70%)' shows a steady increase, crossing the goal line in June. Summary statistics: CLOSED \$3,135,000, OPEN (>70%) \$665,000, GOAL --.
- Assistant:** A panel on the right side with a location pin icon and the text: "Nothing needs your attention right now. Check back later."
- Today's Events:** A panel with a sun and mountains icon and the text: "Looks like you're free and clear the rest of the day."
- Today's Tasks:** A panel with a person and gear icon and the text: "Nothing due today. Be a go-getter, and check back soon."

A tooltip is visible over the gear icon in the top right corner, containing the text: "In a new tab, visit the home page of Salesforce and click the gear cog icon".

# Step: 09

## Click on "Setup"

It will open in a new tab

The screenshot displays the Salesforce home page. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various menu items like Sales, Home, Opportunities, Leads, Tasks, Files, Reports, Accounts, Contacts, and Campaigns. A tooltip is positioned over the 'Setup' link in the top right corner, containing the text 'Click on "Setup" It will open in a new tab'. Below the navigation bar, the main content area is divided into several sections: 'Quarterly Performance' with a line chart showing sales trends from April to June, 'Today's Events' with a message 'Looks like you're free and clear the rest of the day.', and 'Today's Tasks' with a message 'Nothing due today. Be a go-getter, and check back soon.'. On the right side, there is a sidebar with a 'Nothing needs your attention right now. Check back later.' message.

# Step: 10

## Enter "Remote"

The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below it, the "Setup" menu is open, showing a search box with the text "Quick Find". A search overlay box is positioned over the search bar, containing the text "Enter 'Remote'" and a location pin icon. The main content area features three cards: "mySalesforce", "Go Mobile", and "Visit AppExchange". Below these cards is a "Most Recently Used" section with a table containing one item.

Setup Home

Lightning Experience

Lightning Usage

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- ▼ Apps
  - App Manager
  - AppExchange Marketplace
  - > Connected Apps
  - Installed Packages
  - > Lightning Bolt
  - > Mobile Apps
  - Package Manager
- > Feature Settings
- > Einstein
- > Objects and Fields
- > Process Automation

mySalesforce

Use mySalesforce to create your own branded mobile app.

Learn More [↗](#) Take the Trailhead Module [↗](#)

Go Mobile

Prepare the mobile app for your users.

Get Started

Visit AppExchange

Extend Salesforce with the #1 business app marketplace.

Get Started

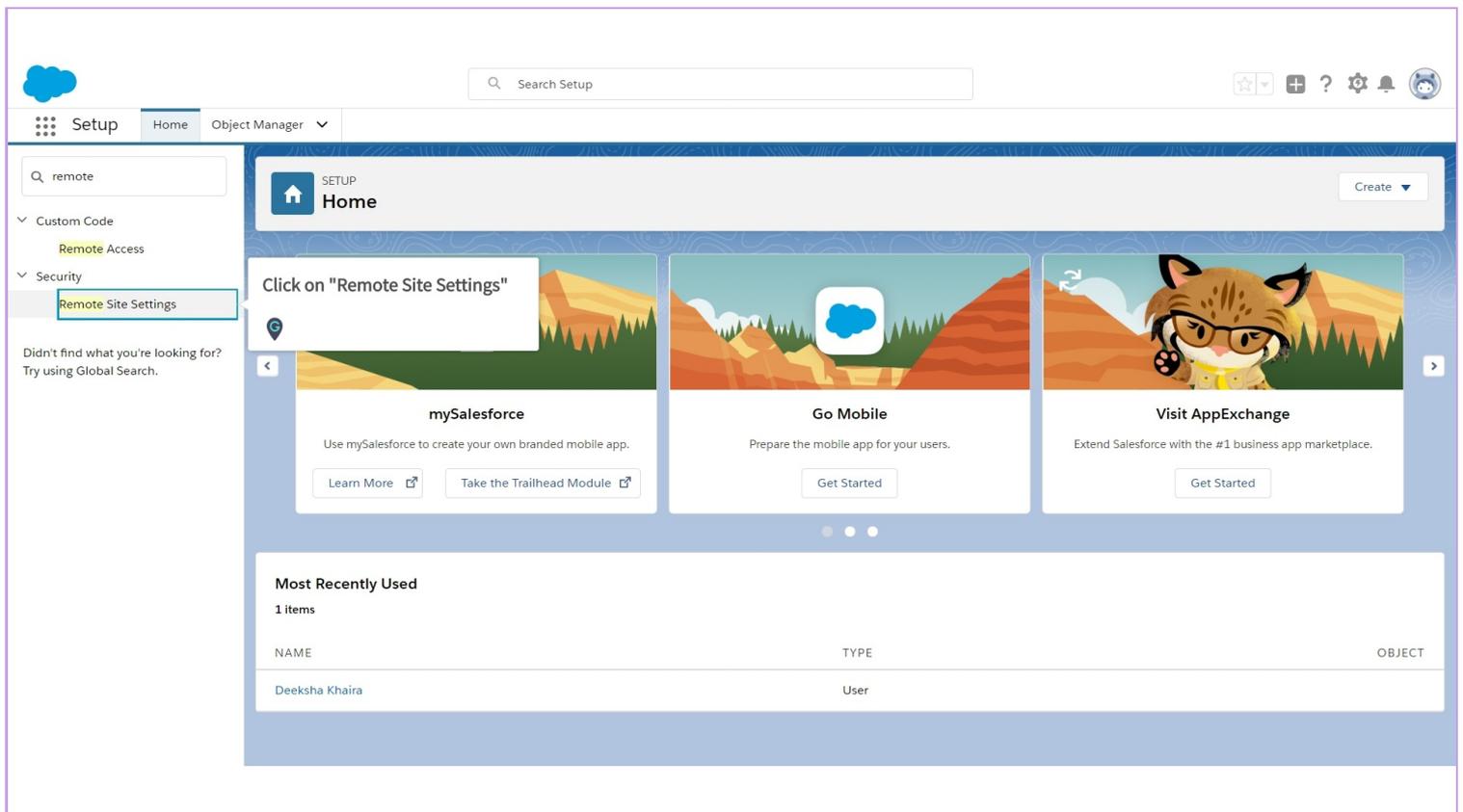
Most Recently Used

1 items

NAME	TYPE	OBJECT
Deeksha Khaira	User	

## Step: 11

### Click on "Remote Site Settings"



The screenshot displays the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and utility icons. The main navigation menu shows "Setup", "Home", and "Object Manager". A search bar on the left contains the text "remote". The left sidebar lists categories: "Custom Code", "Remote Access", and "Security". Under "Security", the "Remote Site Settings" option is highlighted with a blue box. A callout box points to this option with the text "Click on 'Remote Site Settings'". The main content area shows a "Home" dashboard with three cards: "mySalesforce", "Go Mobile", and "Visit AppExchange". Below these cards is a "Most Recently Used" section with a table containing one item.

NAME	TYPE	OBJECT
Deeksha Khaira	User	

# Step: 12

## Click on "New Remote Site"

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options: Setup, Home, Object Manager, Custom Code, Remote Access, Security, and Remote Site Settings. The main content area is titled 'Remote Site Settings' and displays a table of 'All Remote Sites'. A callout box with a location pin icon points to the 'New Remote Site' button above the table.

**Remote Site Settings**

All Remote Sites

Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.

View: All Remote Sites Create New View

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Modified By	Last Modified Date
Edit   Del	ApexDevNet	-	http://www.apexdevnet.com	✓	Khaira_Deeksha	1/31/2019 11:44 PM
Edit   Del	API_Guide_Me_Production	edcast	https://api-v2.guideme.io	✓	Khaira_Deeksha	2/1/2019 12:28 AM
Edit   Del	GuideMev3	edcast	https://api-v3.guideme.io	✓	Khaira_Deeksha	2/1/2019 12:28 AM
Edit   Del	SFDC_Analytics	edcast	https://v3-analytics.guideme.io	✓	Khaira_Deeksha	2/1/2019 12:28 AM

# Step: 13

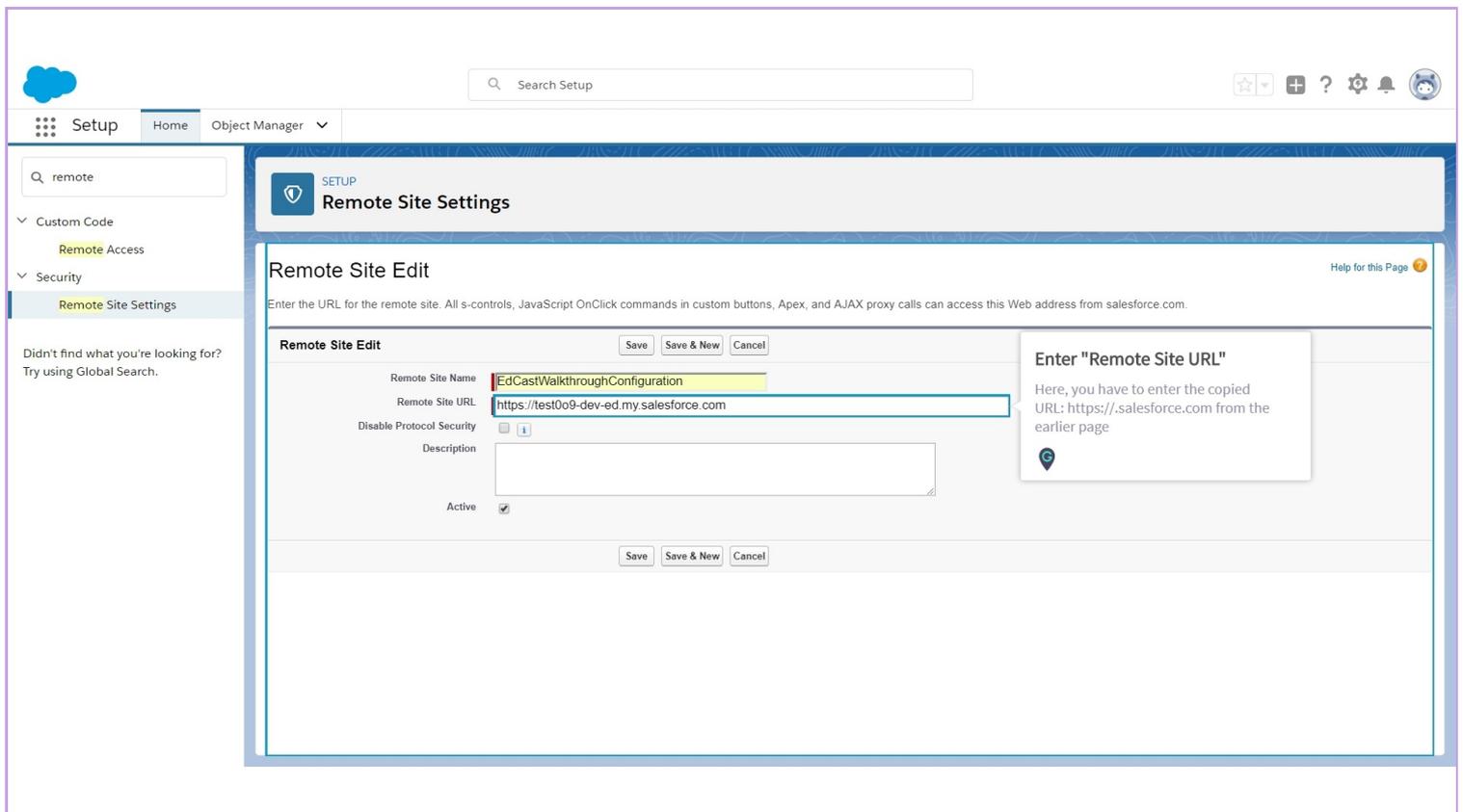
## Enter "Remote Site Name"

The screenshot shows the Salesforce Setup interface for Remote Site Settings. The left sidebar contains a search bar with "remote" and a navigation menu with "Remote Site Settings" selected. The main content area is titled "Remote Site Edit" and includes a "Remote Site Edit" form with fields for "Remote Site Name", "Remote Site URL" (containing "https://test009-dev-ed.my.salesforce.com"), "Disable Protocol Security", "Description", and "Active" (checked). A modal dialog box is open over the "Remote Site Name" field, displaying the text "Enter 'Remote Site Name'". The form also features "Save", "Save & New", and "Cancel" buttons at the top and bottom.

## Step: 14

# Enter "Remote Site URL"

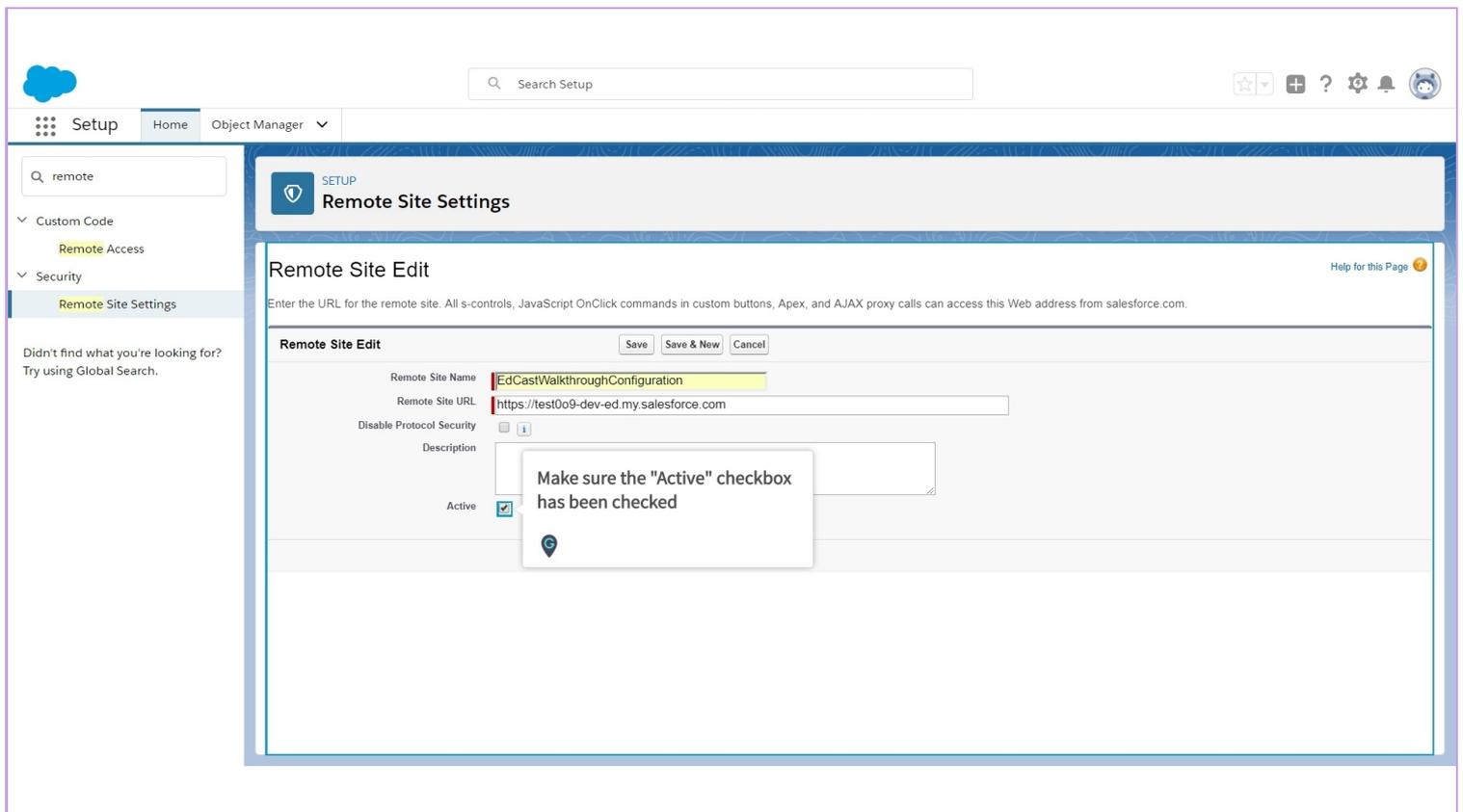
Here, you have to enter the copied URL: `https://.salesforce.com` from the earlier page



The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation options: Setup, Home, Object Manager, Custom Code, Remote Access, Security, and Remote Site Settings. The main content area is titled "Remote Site Settings" and "Remote Site Edit". It includes a search bar, a "Remote Site Edit" header, and a form with fields for Remote Site Name, Remote Site URL, Disable Protocol Security, Description, and Active. A callout box titled "Enter 'Remote Site URL'" is overlaid on the form, containing the text: "Here, you have to enter the copied URL: `https://.salesforce.com` from the earlier page".

## Step: 15

Make sure the "Active" checkbox has been checked



The screenshot shows the Salesforce Setup interface for editing a Remote Site. The page title is "Remote Site Edit" under the "Remote Site Settings" section. The "Remote Site Name" is "EdCastWalkthroughConfiguration" and the "Remote Site URL" is "https://test009-dev-ed.my.salesforce.com". The "Active" checkbox is checked. A callout box with a location pin icon points to the "Active" checkbox and contains the text: "Make sure the 'Active' checkbox has been checked". The left sidebar shows the navigation menu with "Remote Site Settings" selected. The top navigation bar includes "Setup", "Home", and "Object Manager".

# Step: 16

Click on "Save"

The screenshot shows the Salesforce Setup interface for Remote Site Settings. The left sidebar contains navigation options: Setup, Home, Object Manager, Custom Code, Remote Access, Security, and Remote Site Settings. The main content area is titled "Remote Site Edit" and includes a search bar, "Save", "Save & New", and "Cancel" buttons. The form fields are: Remote Site Name (EdCastWalkthroughConfiguration), Remote Site URL (https://test009-dev-ed.my.salesforce.com), Disable Protocol Security (checkbox), Description (text area), and Active (checkbox checked). A callout box with a location pin icon and the text "Click on 'Save'" points to the Save button.

# Step: 17

## Remote Site Details have been updated

Now, go back to the "Configuration Page"

The screenshot shows the 'Remote Site Settings' page in a cloud management console. The page title is 'Remote Site Settings' and the sub-header is 'Remote Site Details'. A modal dialog box is displayed over the table, stating 'Remote Site Details have been updated' and 'Now, go back to the "Configuration Page"'. The table includes fields for Remote Site Name, Remote Site URL, Disable Protocol Security, Description, Active status, and Created By.

Remote Site Detail		Modified By
Remote Site Name	EdCastWalkthrough	<a href="#">Deeksha Khaira</a> , 2/1/2019 12:44 AM
Remote Site URL	https://test009-dev	
Disable Protocol Security	<input type="checkbox"/>	
Description		
Active	<input checked="" type="checkbox"/>	
Created By	<a href="#">Deeksha Khaira</a> , 2/1/2019 12:44 AM	

## Step: 18

### Click on "Configure EdCast"

EdCast

#### EdCast Configuration

Create [Remote site setting](#) for this URL <https://test009-dev-ed.my.salesforce.com> then click on below button.

Create Edcast Tours button on objects.

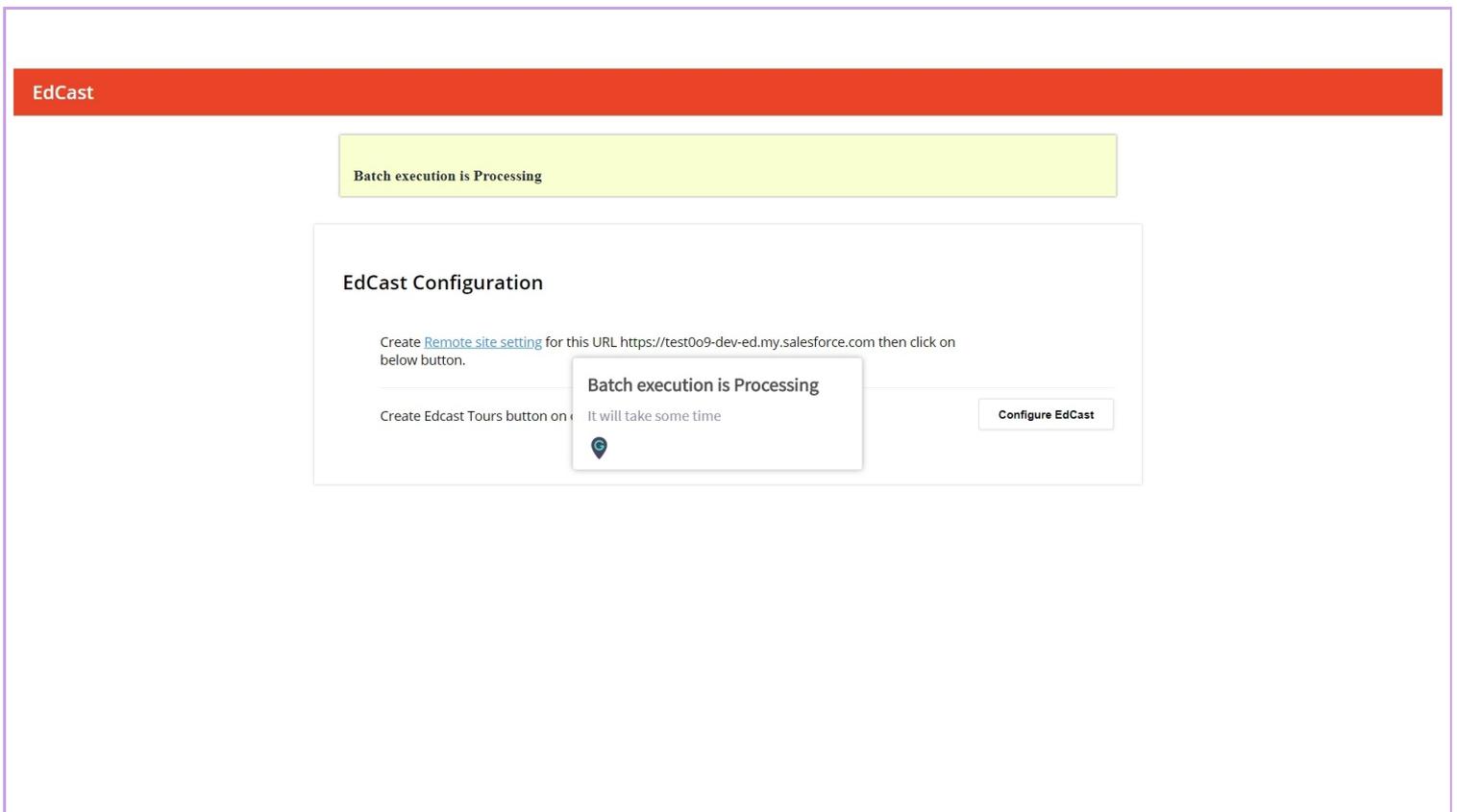
Configure EdCast

Click on "Configure EdCast"

## Step: 19

# Batch execution is Processing

It will take some time

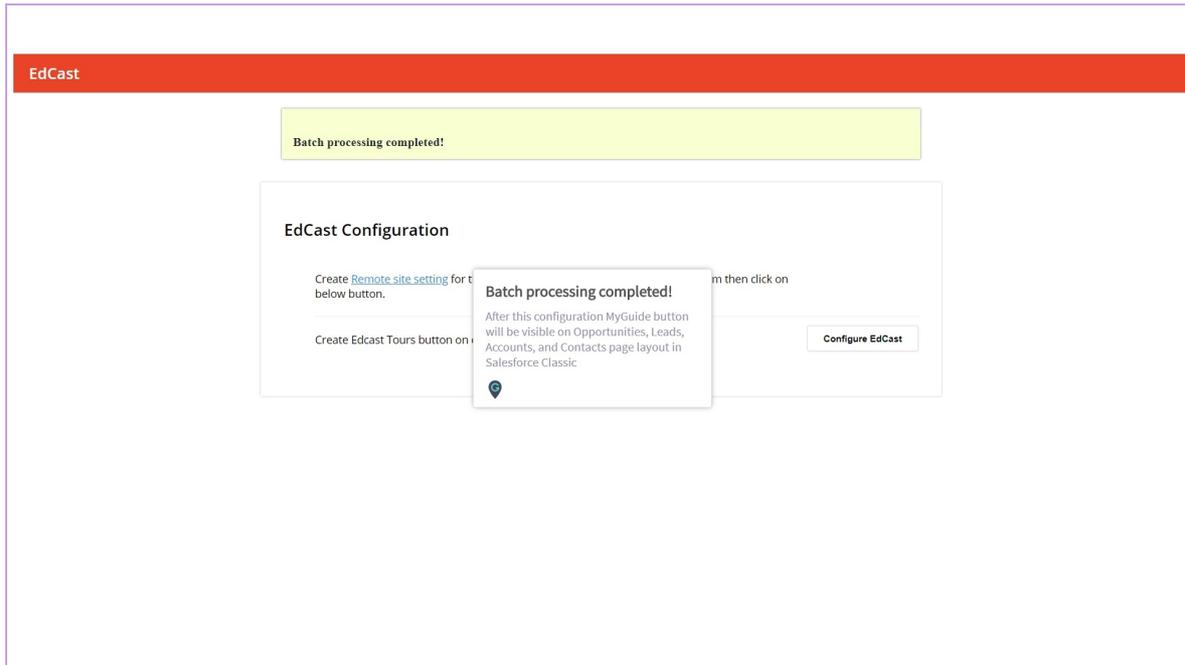


The screenshot shows the EdCast configuration interface. At the top, there is a red header bar with the text "EdCast". Below this, a yellow box displays the message "Batch execution is Processing". The main content area is titled "EdCast Configuration" and contains the following text: "Create [Remote site setting](#) for this URL <https://test0o9-dev-ed.my.salesforce.com> then click on below button." Below this text is a horizontal line. Underneath the line, the text "Create Edcast Tours button on" is visible. To the right of this text is a button labeled "Configure EdCast". A modal dialog box is overlaid on the page, containing the text "Batch execution is Processing" and "It will take some time" with a location pin icon.

## Step: 20

# Batch processing completed!

After this configuration MyGuide button will be visible on Opportunities, Leads, Accounts, and Contacts page layout in Salesforce Classic



# Thank You!

[myguide.org](https://myguide.org)