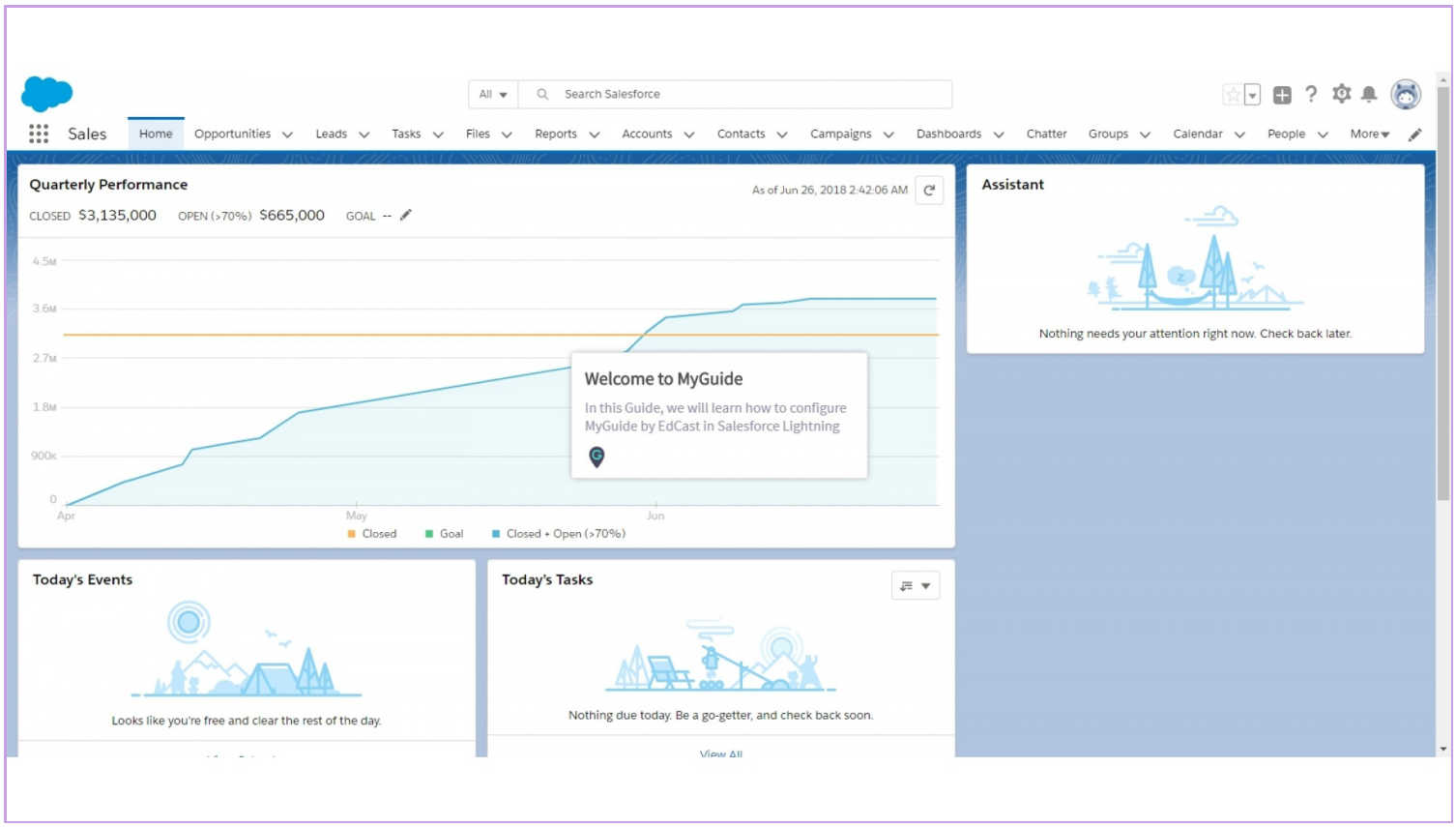
Configure MyGuide by EdCast

myguide.org

Step: 01

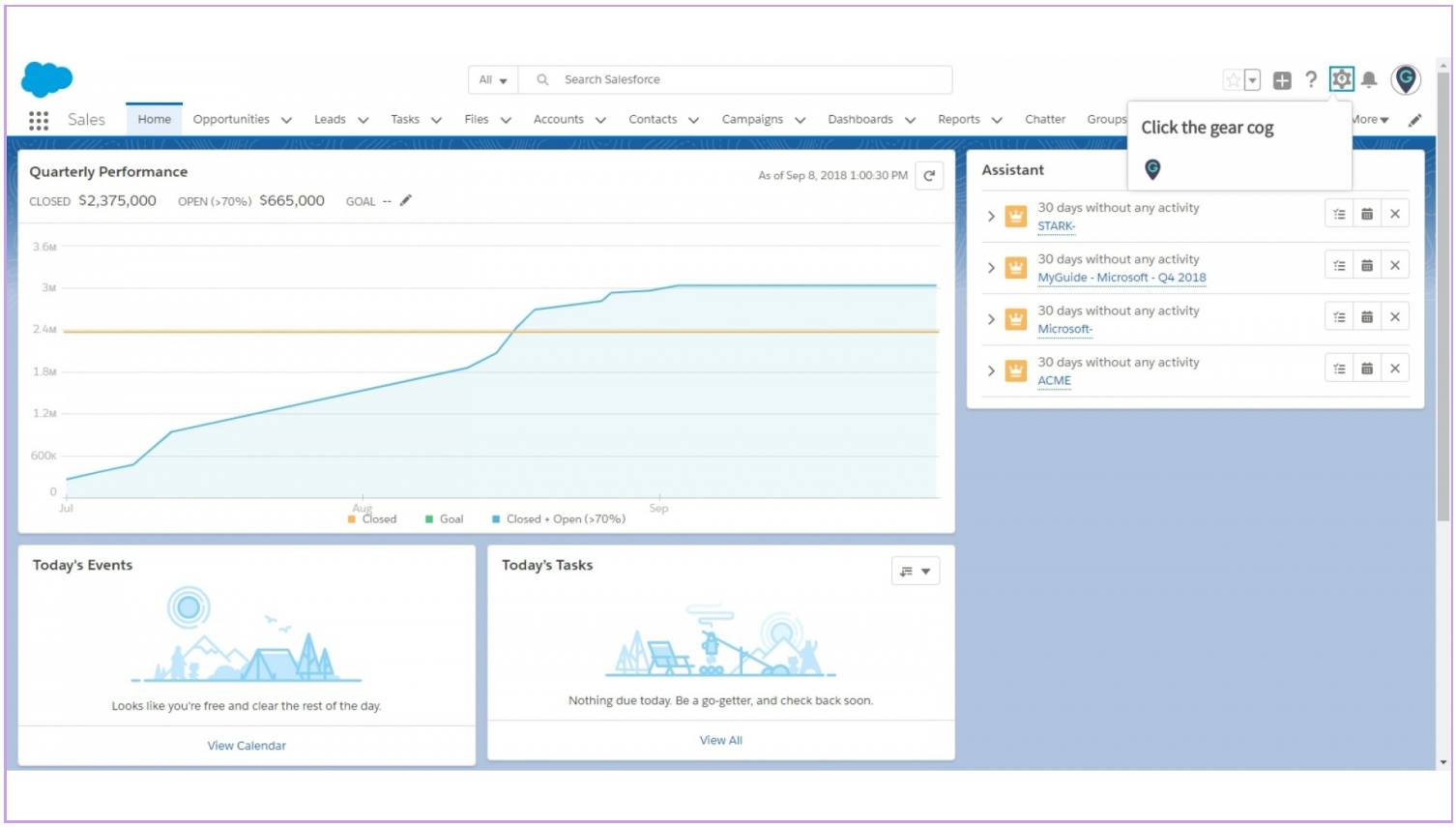
Welcome to MyGuide

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



Step: 02

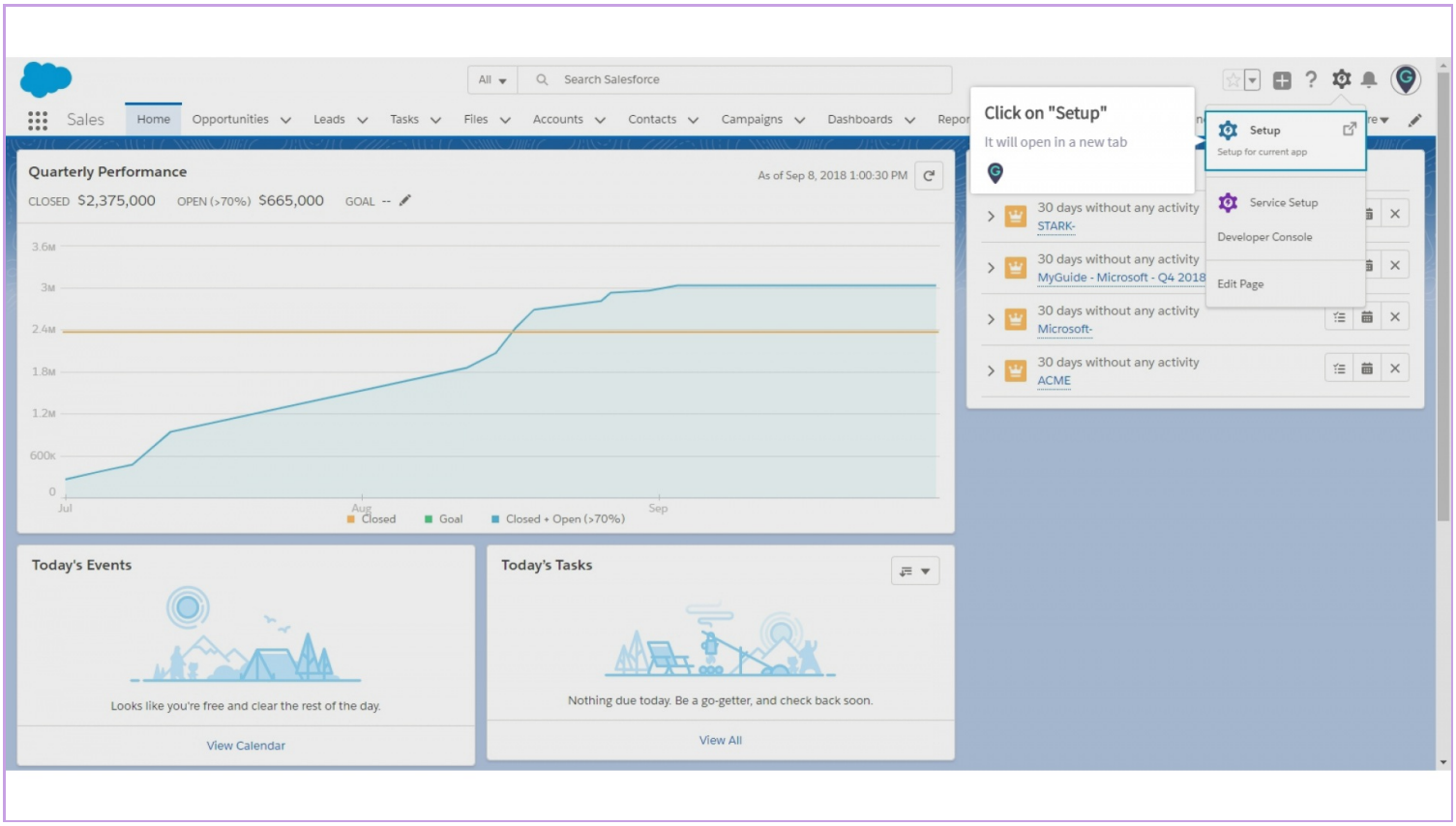
Click the gear cog



Step: 03

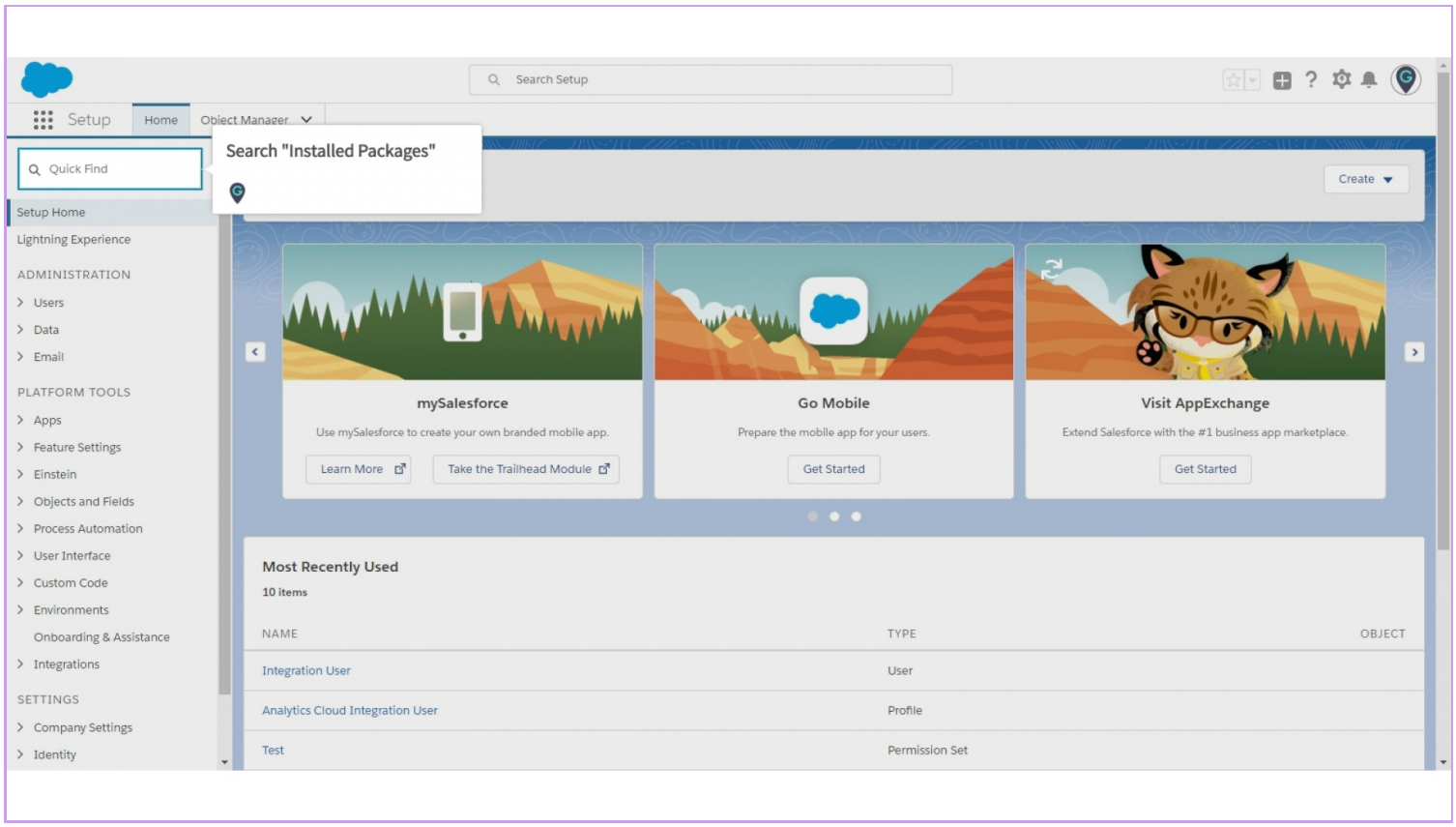
Click on "Setup"

It will open in a new tab



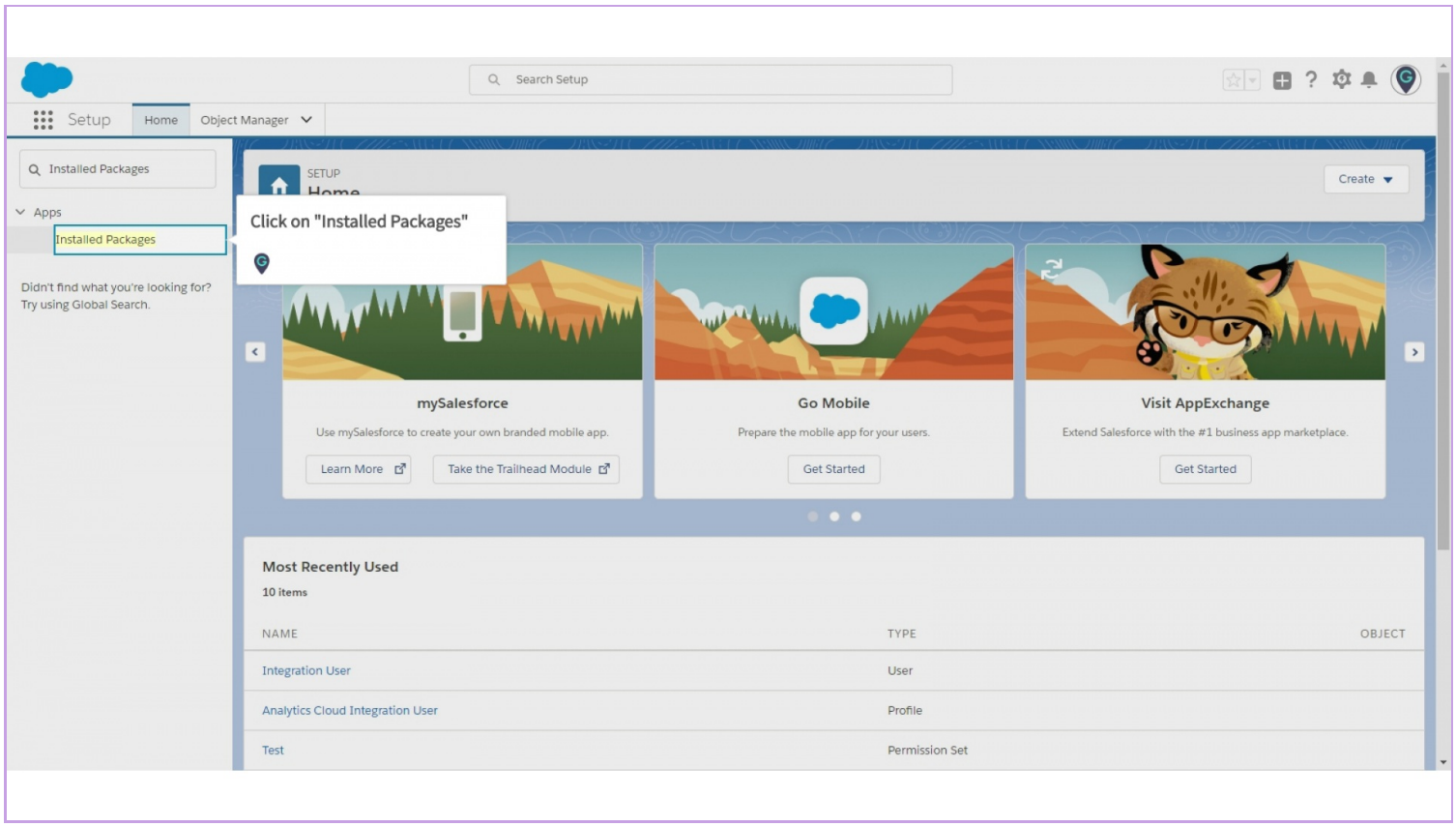
Step: 04

Search "Installed Packages"



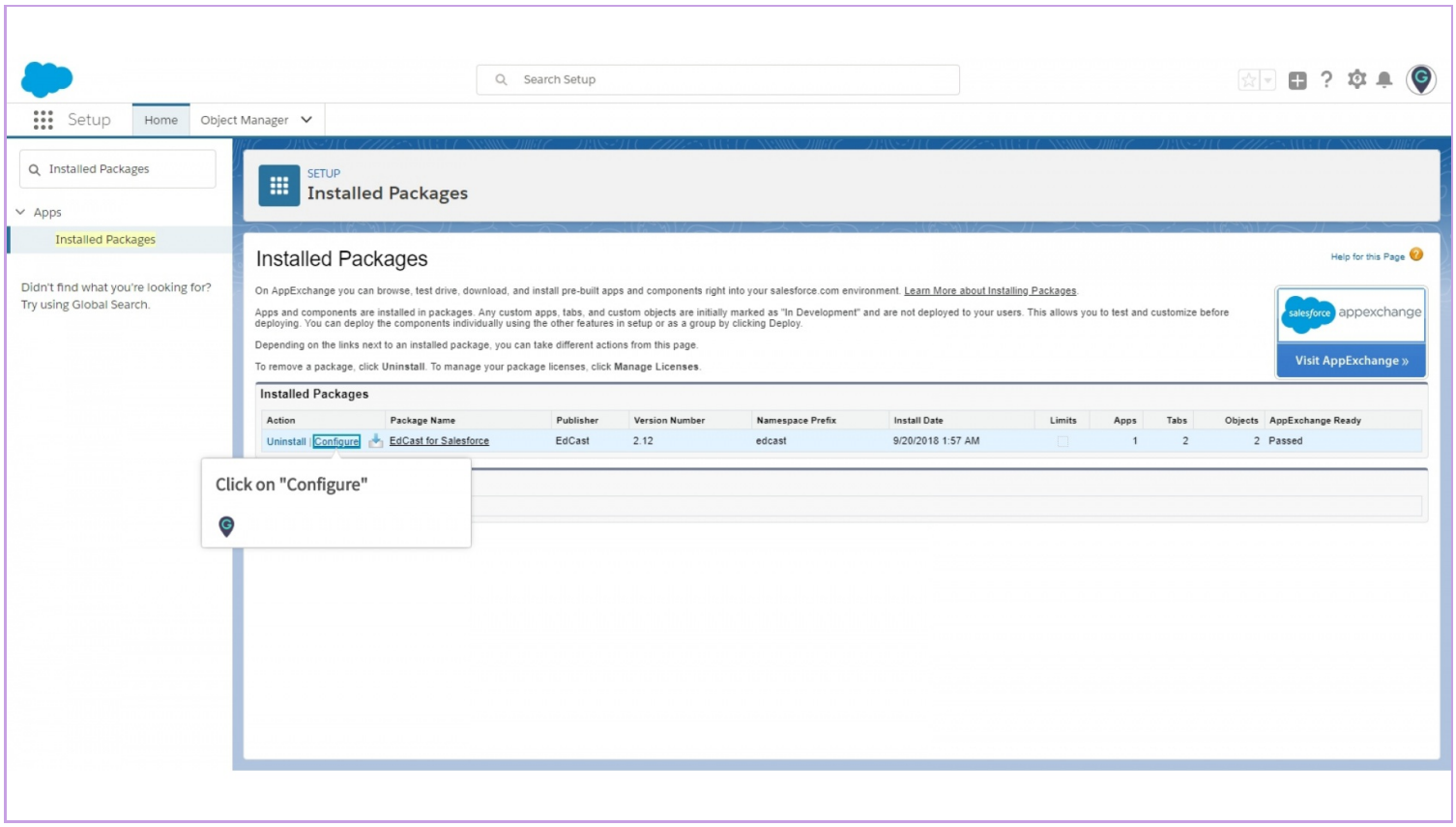
Step: 05

Click on "Installed Packages"



Step: 06

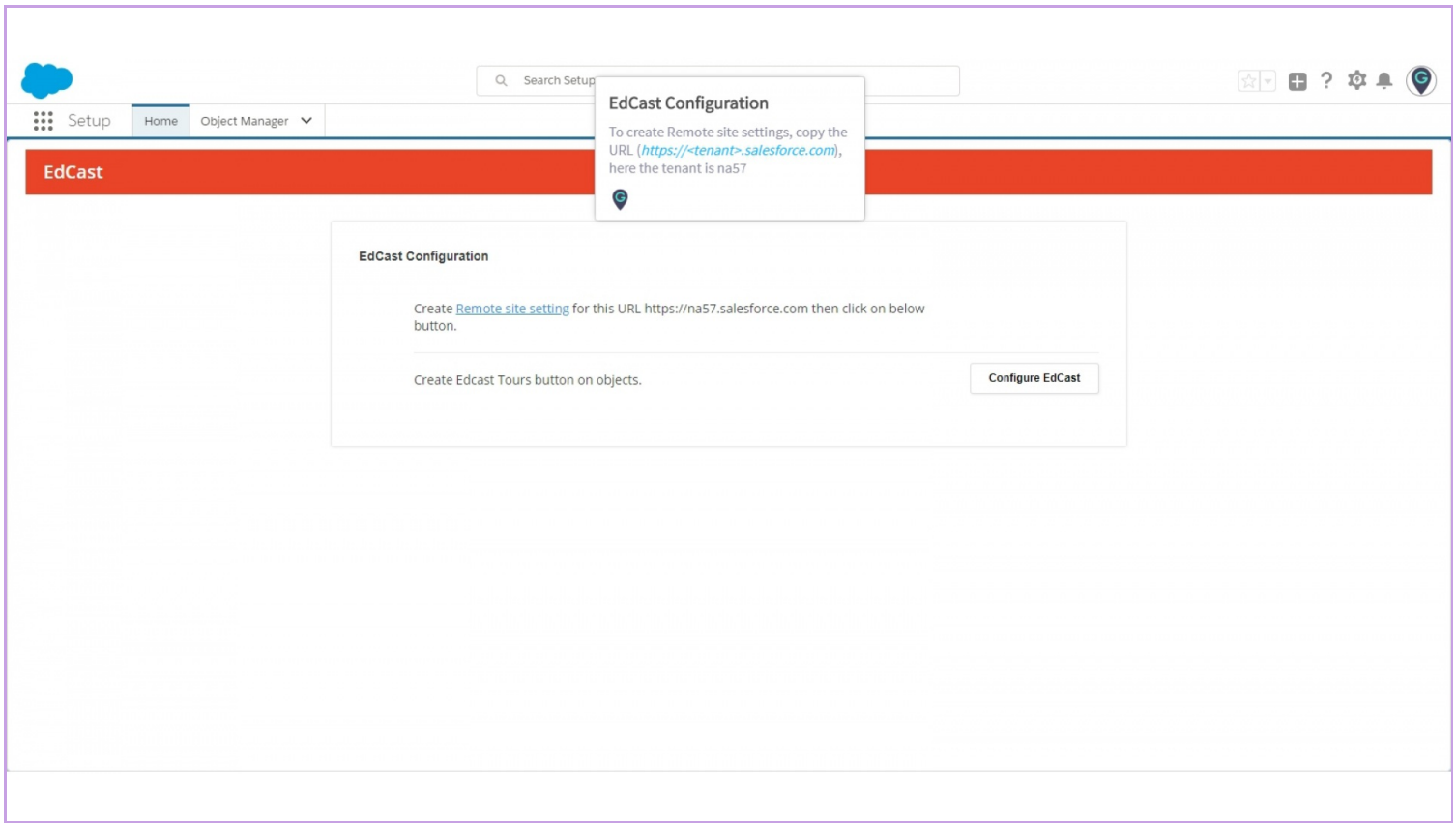
Click on "Configure"



Step: 07

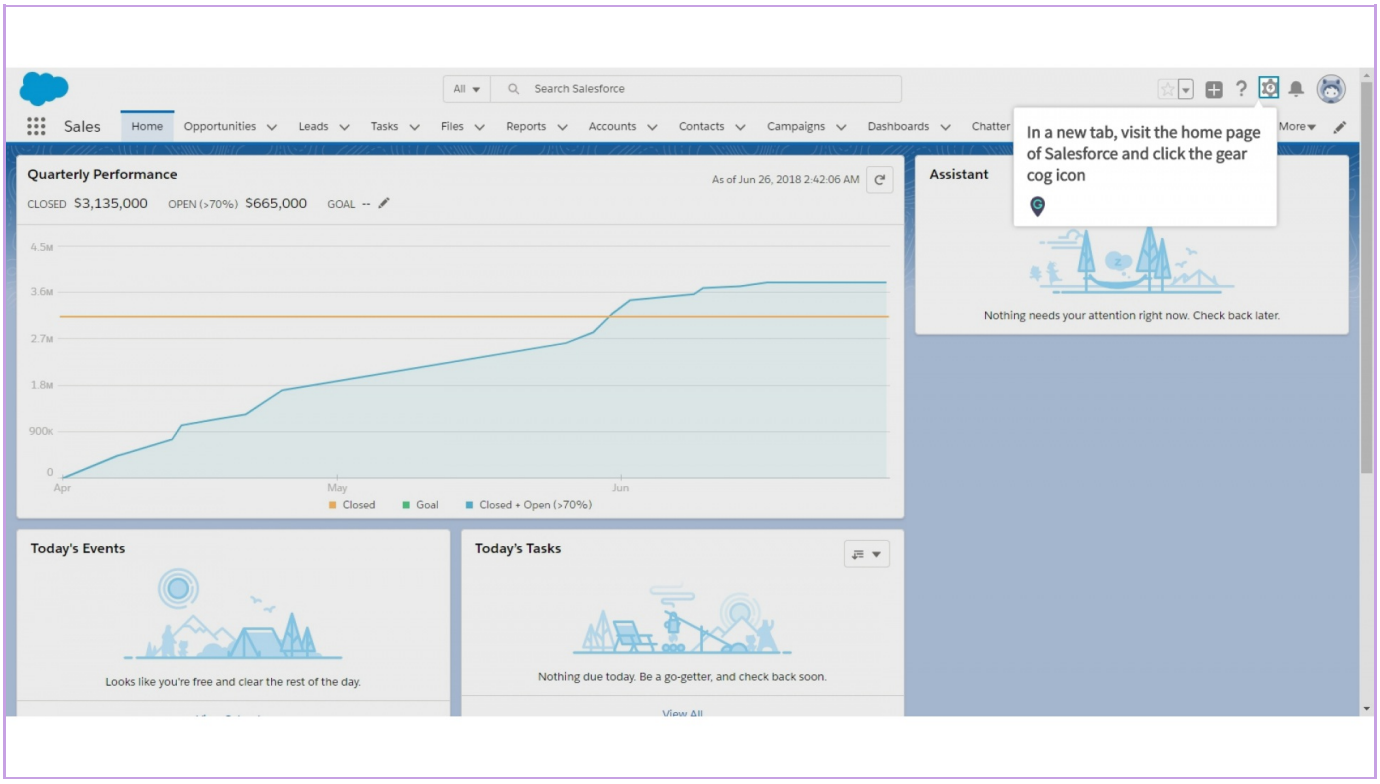
EdCast Configuration

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



Step: 08

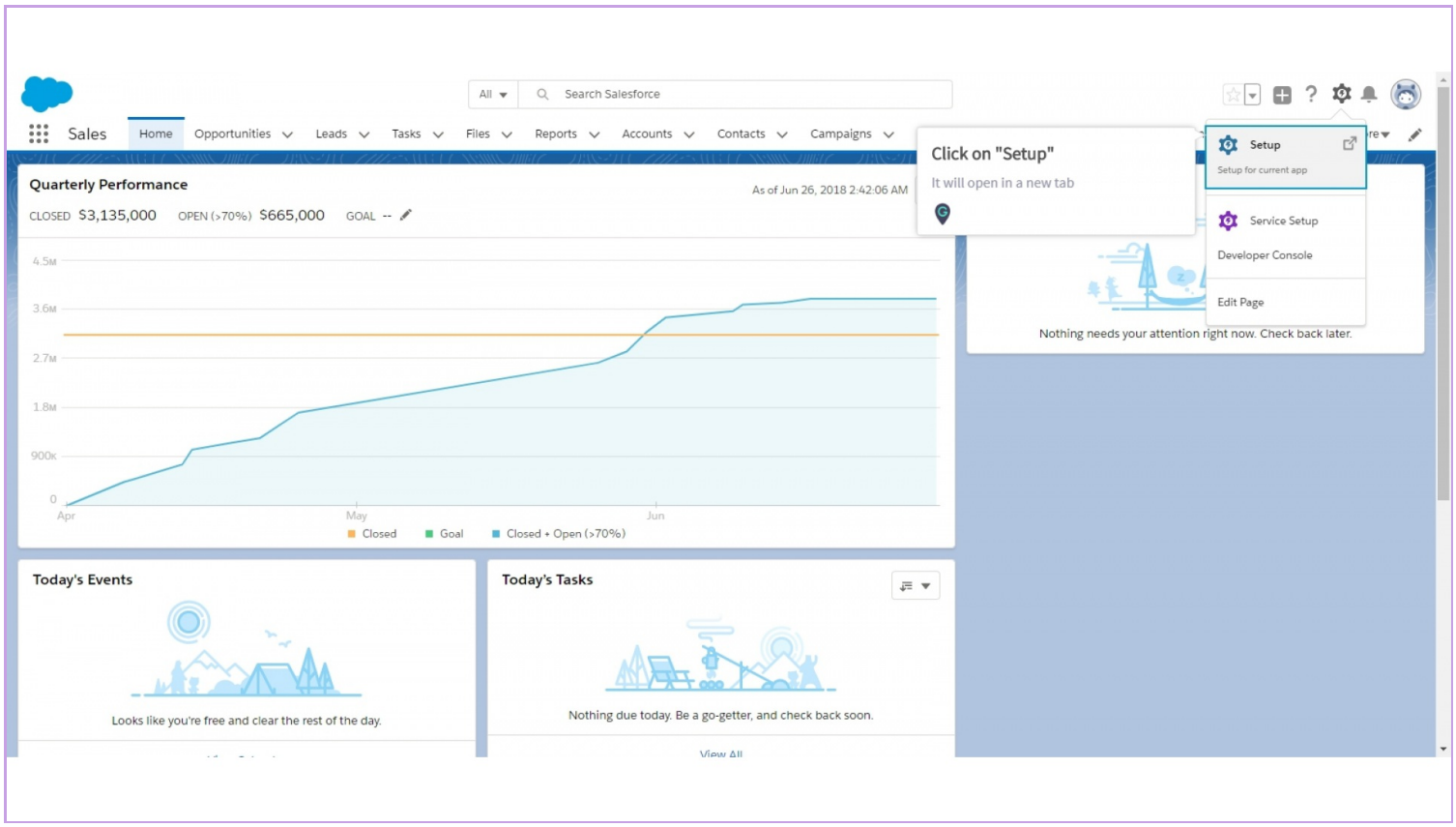
In a new tab, visit the home page of Salesforce and click the gear cog icon



Step: 09

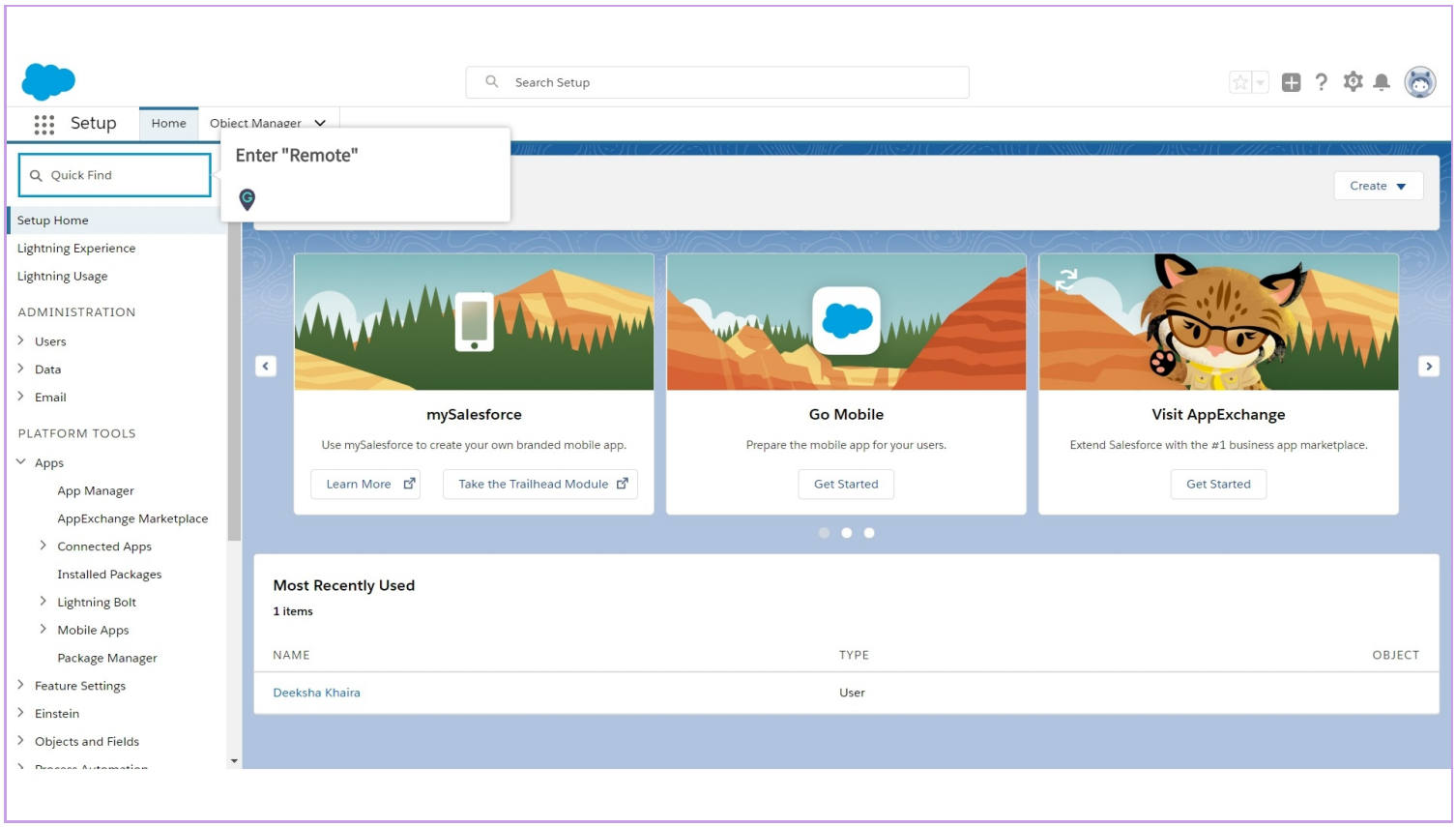
Click on "Setup"

It will open in a new tab



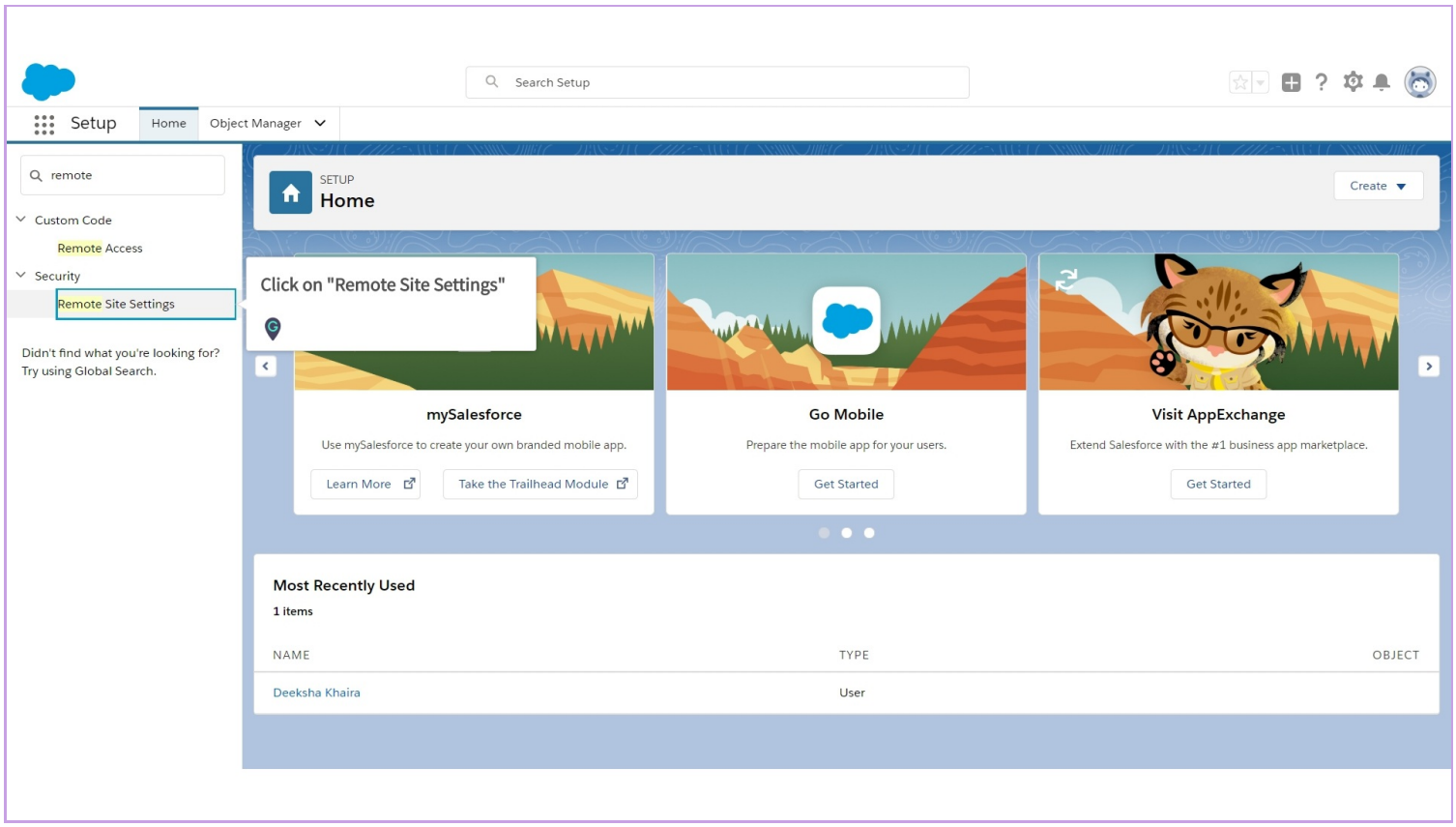
Step: 10

Enter "Remote"



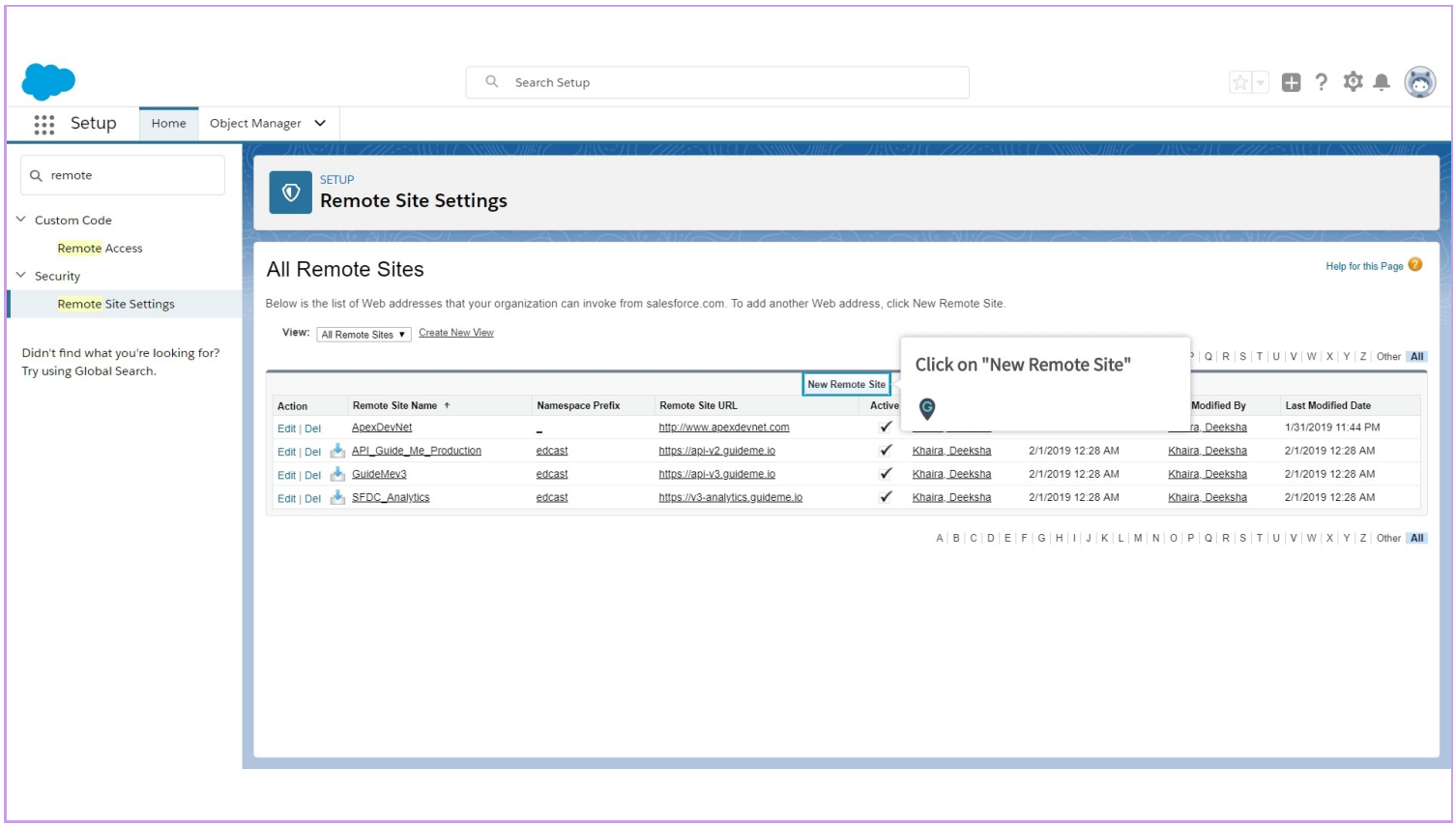
Step: 11

Click on "Remote Site Settings"



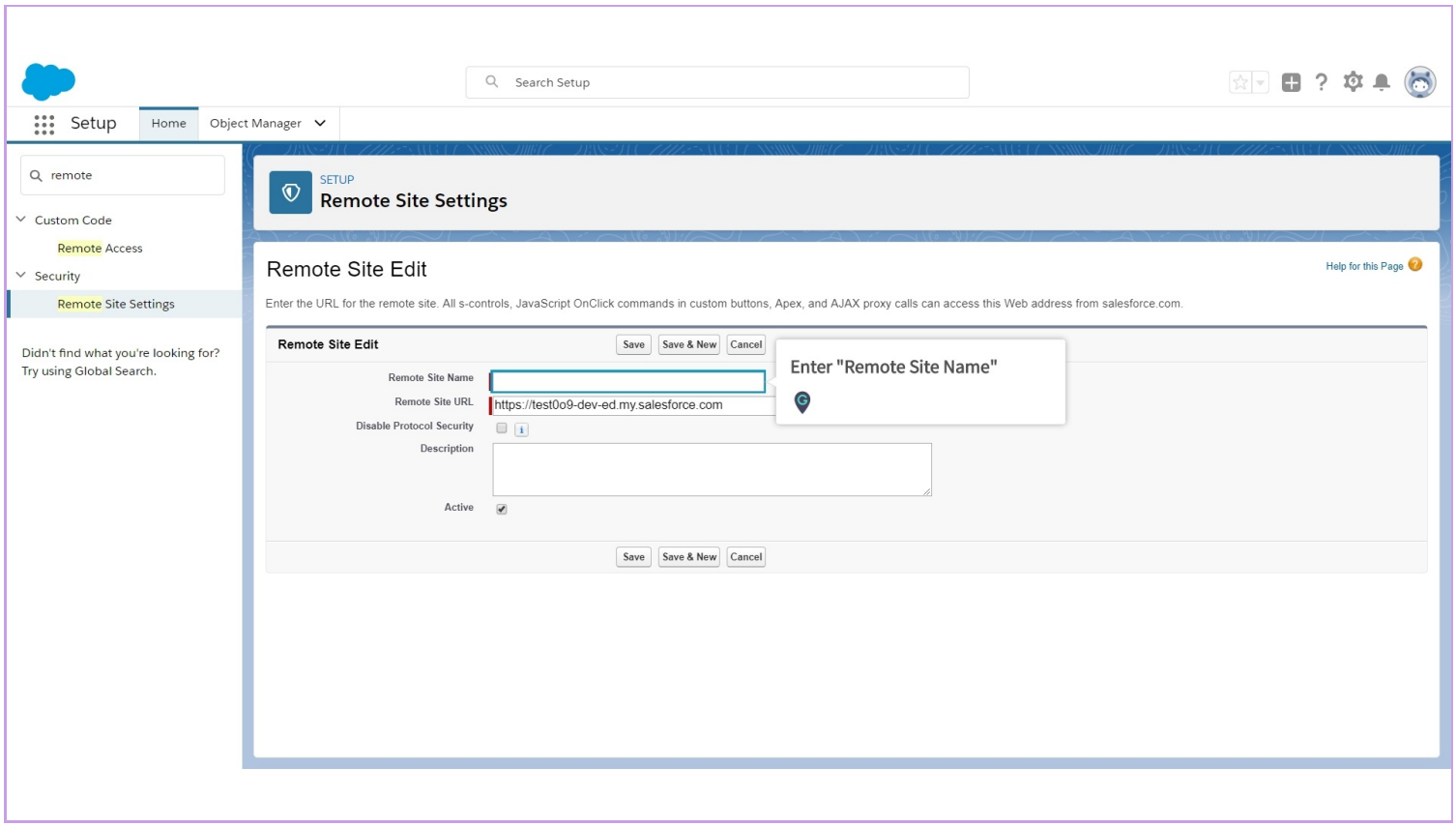
Step: 12

Click on "New Remote Site"



Step: 13

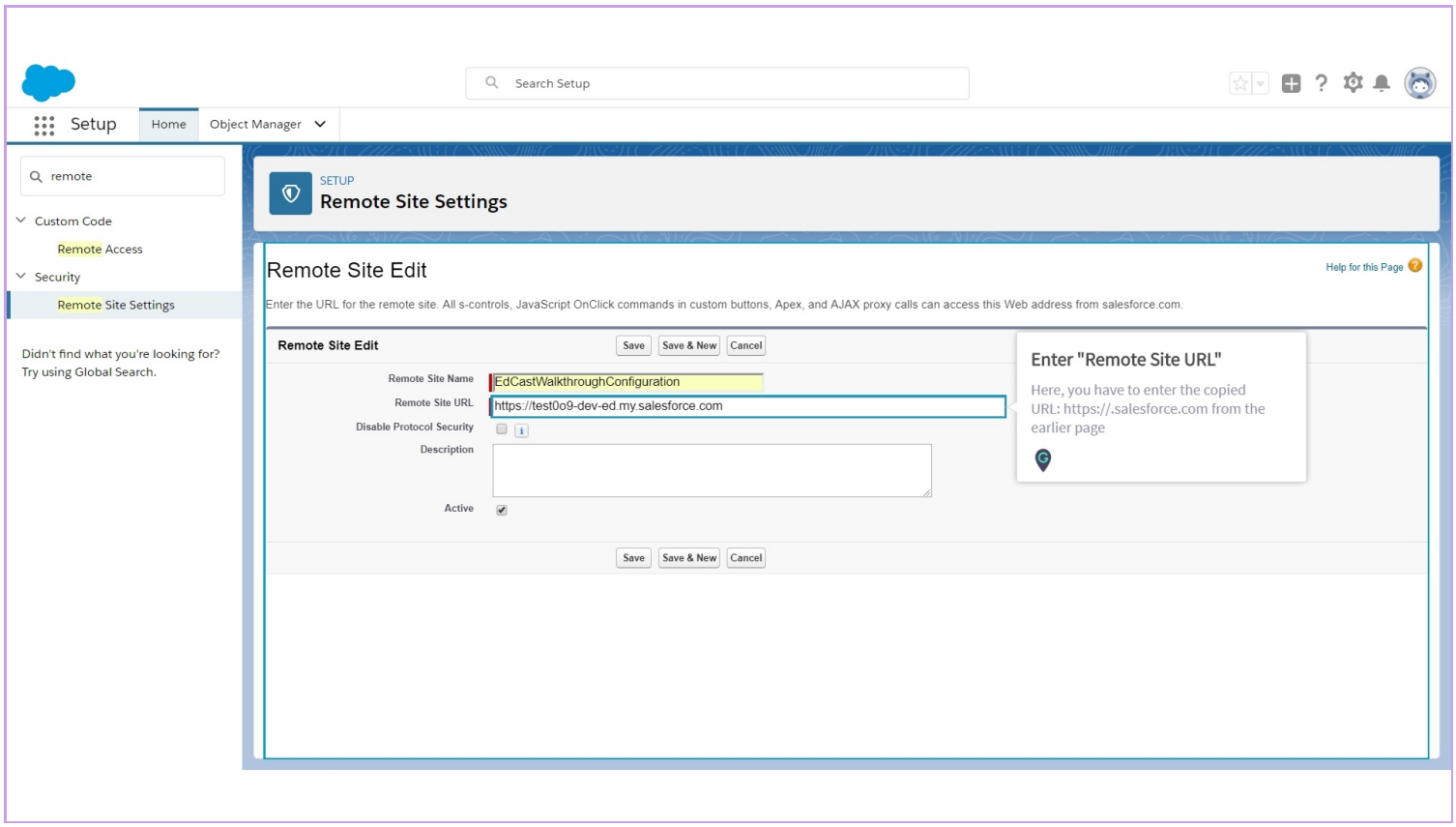
Enter "Remote Site Name"



Step: 14

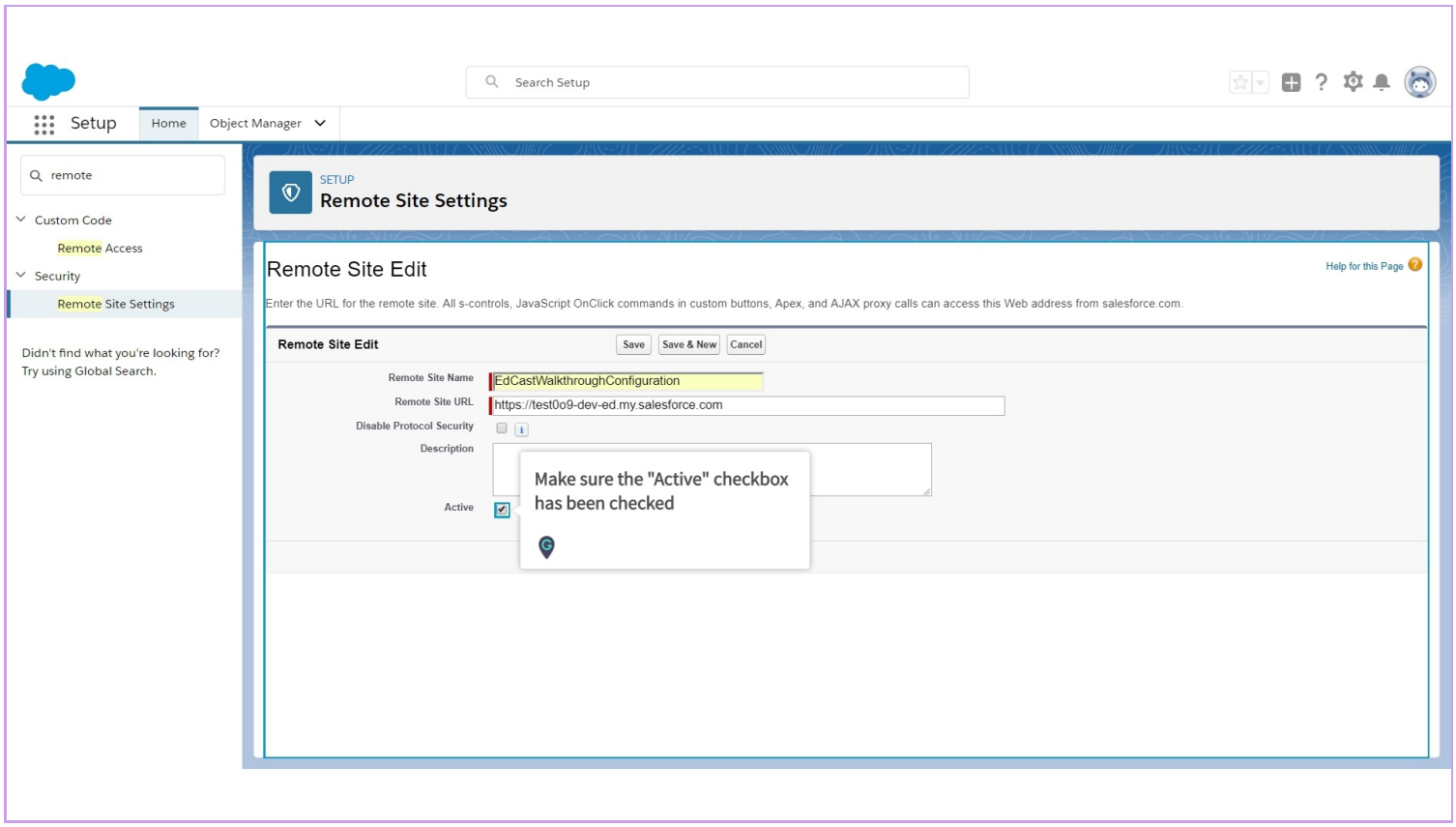
Enter "Remote Site URL"

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



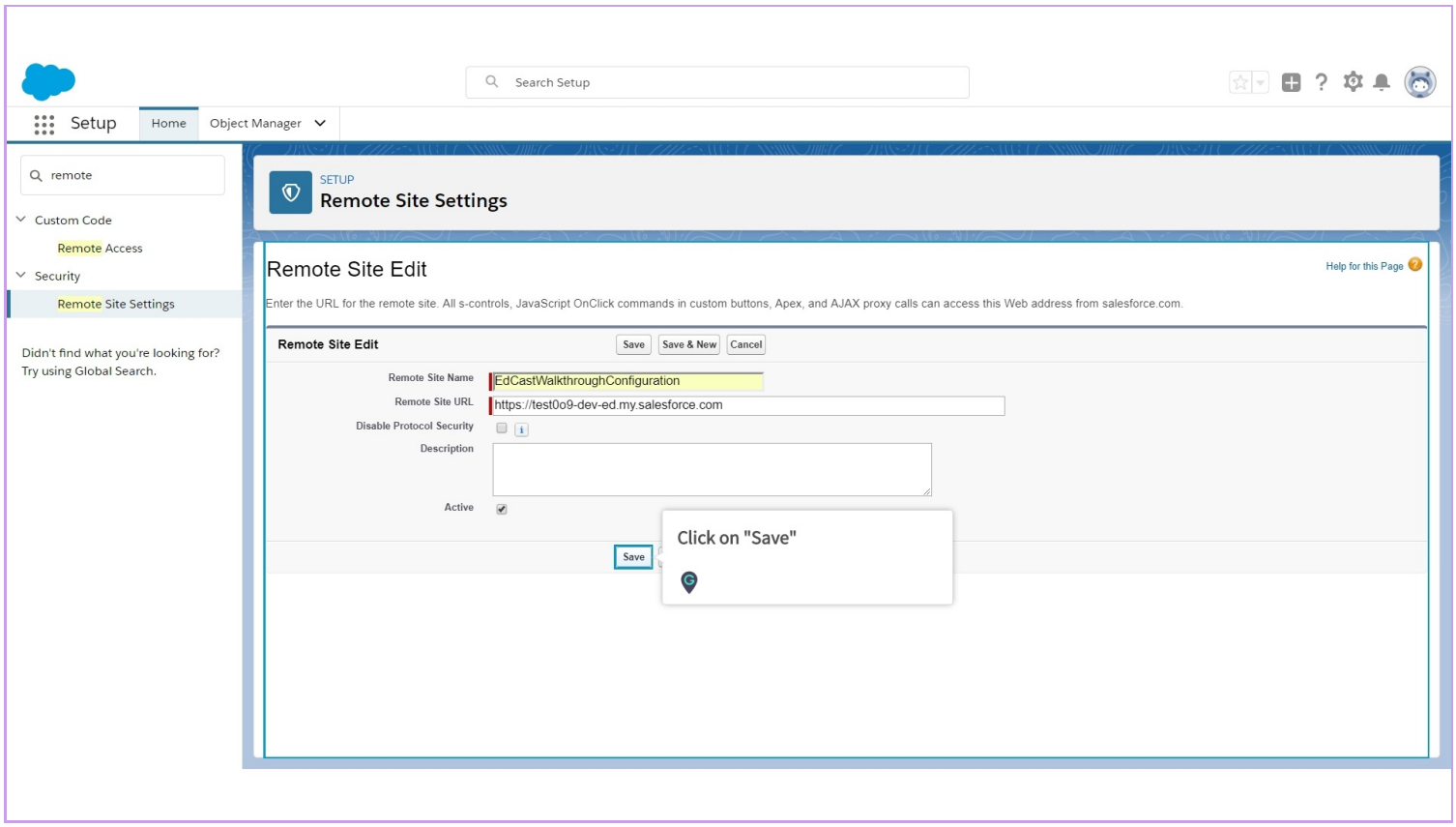
Step: 15

Make sure the "Active" checkbox has been checked



Step: 16

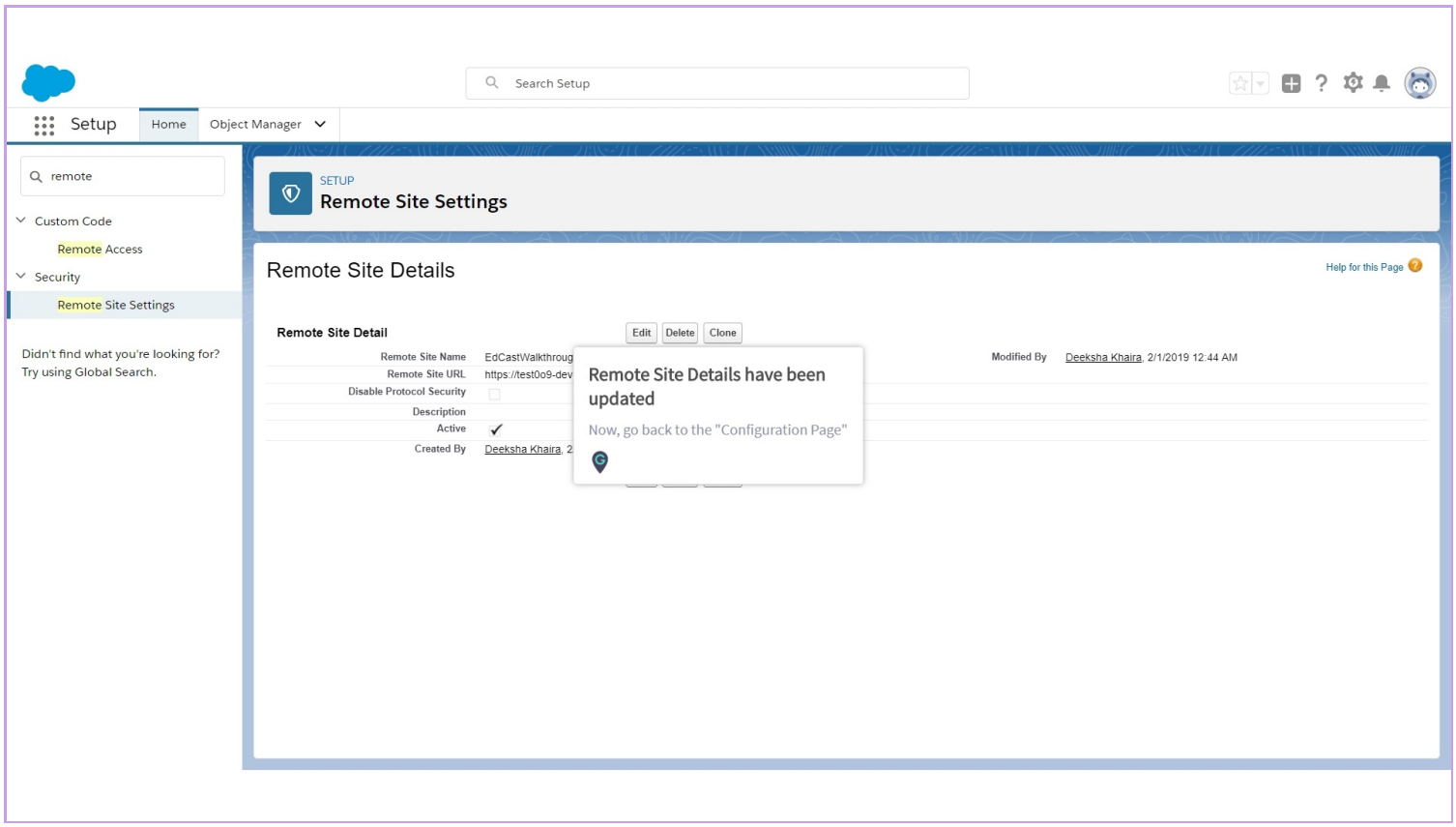
Click on "Save"



Step: 17

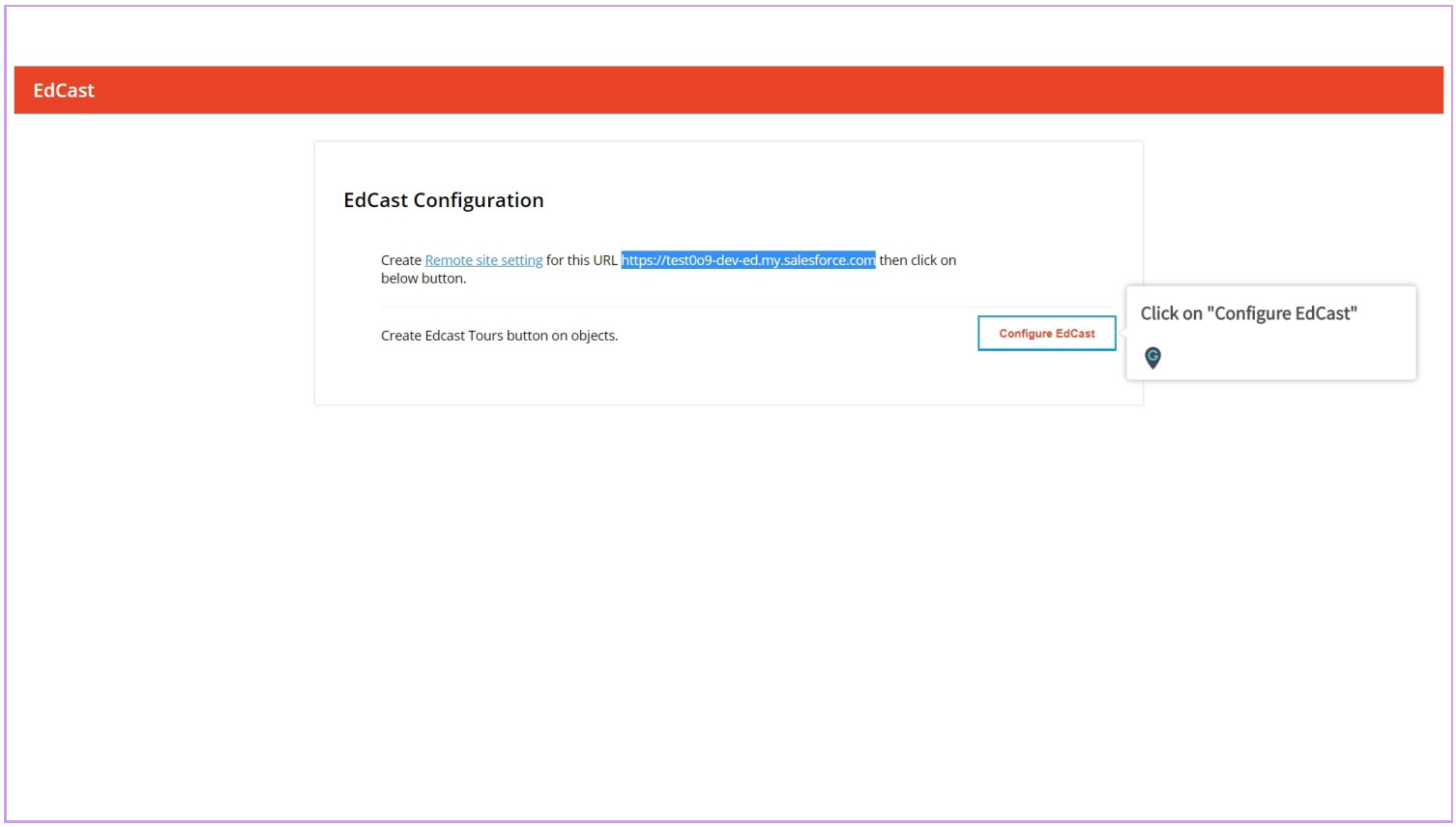
Remote Site Details have been updated

Now, go back to the "Configuration Page"



Step: 18

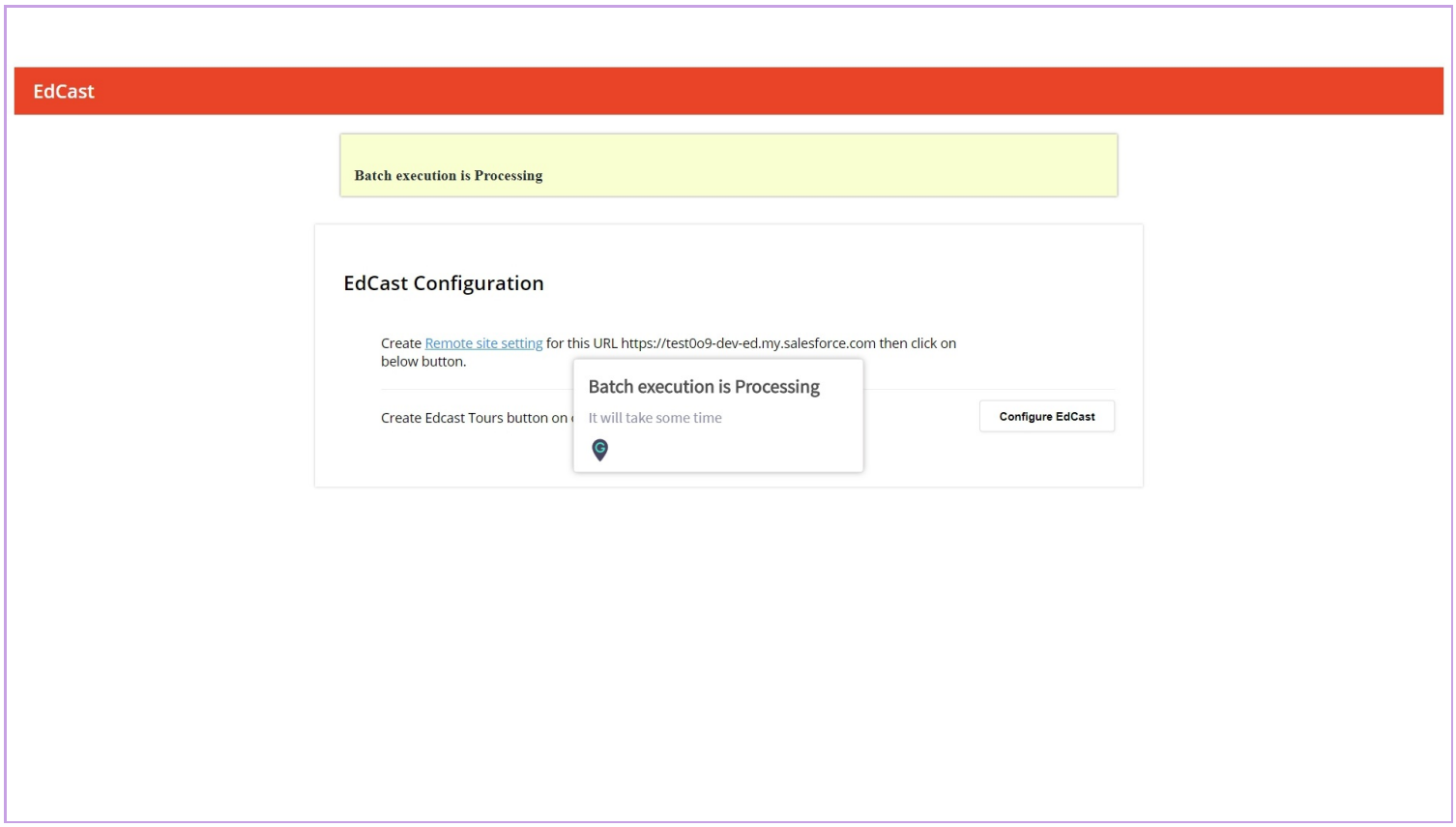
Click on "Configure EdCast"



Step: 19

Batch execution is Processing

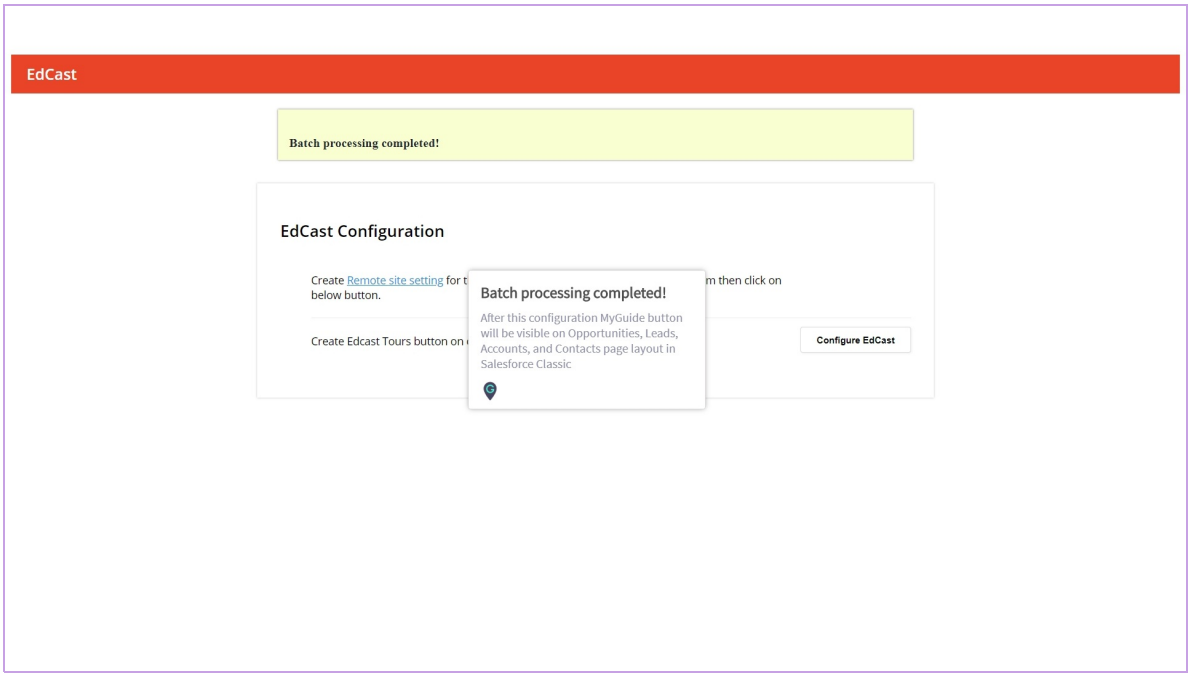
It will take some time



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!

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