



Add MyGuide Utility Bar to App

Step: 01

Welcome to MyGuide

In this guide we will learn how to add MyGuide utility bar in Salesforce Lightning

The screenshot displays the Salesforce Lightning interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below this is a main dashboard area. The primary component is a 'Quarterly Performance' chart showing sales trends from January to February. The chart includes a blue line for 'Closed + Open (>70%)', a green horizontal line for 'Goal', and an orange horizontal line for 'Closed'. A tooltip titled 'Welcome to MyGuide' is positioned over the chart, containing the text: 'In this guide we will learn how to add MyGuide utility bar in Salesforce Lightning'. To the right of the chart is an 'Assistant' panel with two alerts: 'Opportunity is overdue Grand Hotels Guest Portable Generators' and '30 days without any activity Edge Emergency Generator'. Below the chart are two sections: 'Today's Events' and 'Today's Tasks', each with a decorative icon.

Step: 02

Click the gear cog

The screenshot shows the 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" is positioned over 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 legend indicates: Closed (orange square), Goal (green square), and Closed + Open (>70%) (blue square). The chart shows a steady increase in sales, crossing the goal line in late August.
- 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 panel on the right side showing a list of reminders, each with a crown icon and a close button. The items 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"

The screenshot shows the Salesforce dashboard interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below this is a main navigation menu with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and Dashboards. The main content 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 current performance is shown as a blue line that rises above the goal line in August and remains there through September. 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.

On the right side, a "Setup" menu is open, showing options like "Setup for current app", "Service Setup", "Developer Console", and "Edit Page". A callout box labeled "Click on 'Setup'" points to the "Setup" icon in the top right corner. Below the "Setup" menu, there is a list of items with a crown icon and a "30 days without any activity" warning, including "STARK-", "MyGuide - Microsoft - Q4 2018", "Microsoft-", and "ACME".

Step: 04

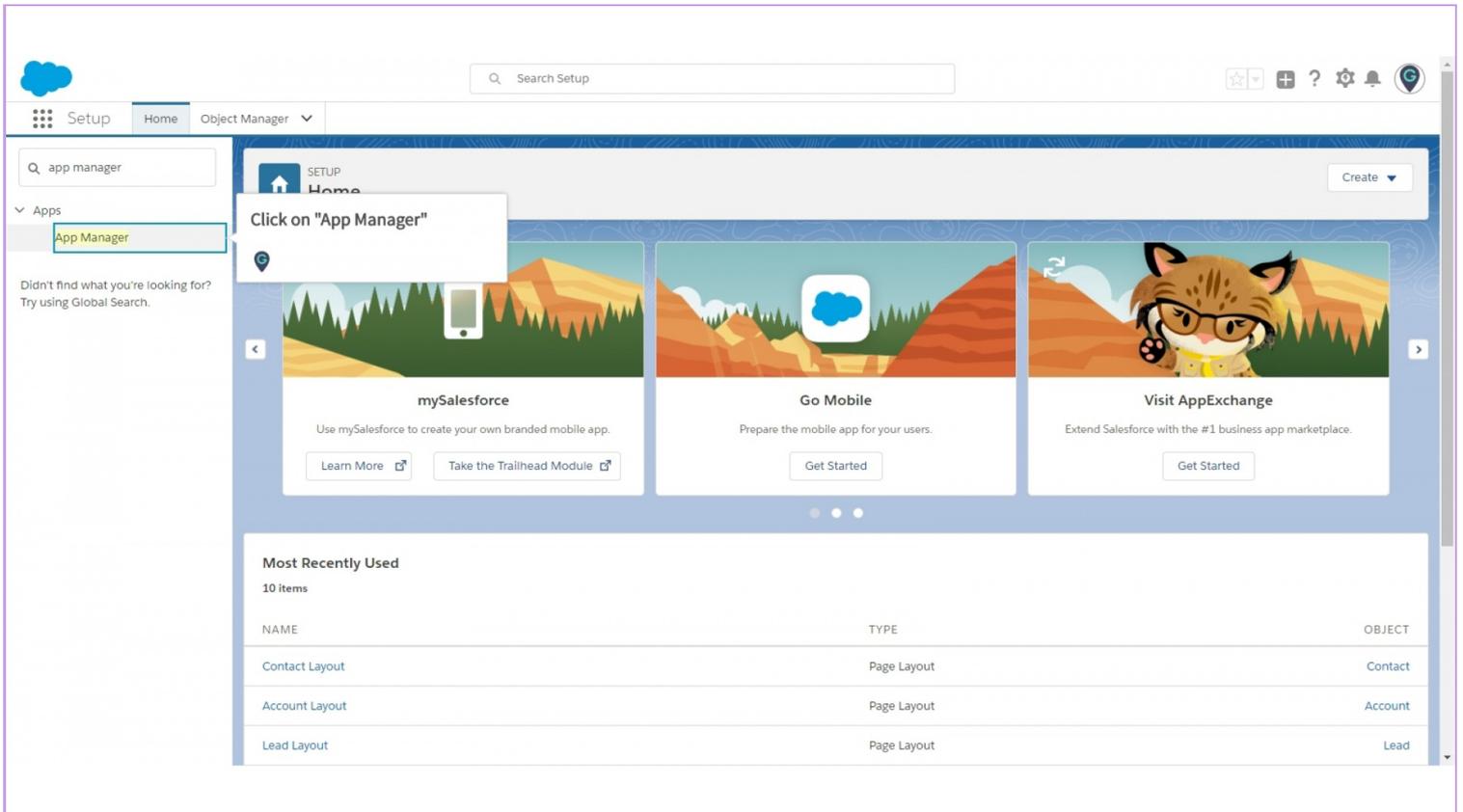
Enter "App Manager"

The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below it, the navigation menu includes "Setup", "Home", and "Object Manager". A search box labeled "Quick Find" is also present. A callout box with a location pin icon contains the text "Enter 'App Manager'". The main content area features three cards: "mySalesforce" (with a "Learn More" and "Take the Trailhead Module" button), "Go Mobile" (with a "Get Started" button), and "Visit AppExchange" (with a "Get Started" button). Below these cards is a "Most Recently Used" section with a table of 10 items.

NAME	TYPE	OBJECT
Contact Layout	Page Layout	Contact
Account Layout	Page Layout	Account
Lead Layout	Page Layout	Lead

Step: 05

Click on "App Manager"



Step: 06

Select any Lightning App

The screenshot shows the Salesforce Lightning Experience App Manager interface. A callout box with a location pin icon and the text "Select any Lightning App" is positioned over the top of the app list. The interface includes a search bar at the top, a navigation menu on the left, and a table of 17 apps. The table columns are: APP NAME, DEVELOPER NAME, DESCRIPTION, LAST MODIFIED, APP TYPE, and VISIBILITY. The table is sorted by App Name and filtered by all app menu items - TabSet Type.

APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED	APP TYPE	VISIBILITY
3 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	1/31/2019 11:45 PM	Lightning	✓
4 Community	Community	Salesforce CRM Communities	1/31/2019 11:44 PM	Classic	✓
5 Content	Content	Salesforce CRM Content	1/31/2019 11:44 PM	Classic	✓
6 EdCast for Salesfor...	Edcast_App		2/1/2019 12:54 AM	Connected (Managed)	
7 Lightning Usage App	LightningInstrumentati...	View Adoption and Usage Metrics for Lightning Experience	1/31/2019 11:44 PM	Lightning	✓
8 Marketing	Marketing	Best-in-class on-demand marketing automation	1/31/2019 11:44 PM	Classic	✓
9 MyGuide	SalesU		2/1/2019 12:54 AM	Lightning (Managed)	✓
10 Platform	Platform	The fundamental Lightning Platform	1/31/2019 11:44 PM	Classic	
11 Sales	Sales	The world's most popular sales force automation (SFA) solution	1/31/2019 11:44 PM	Classic	
12 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	1/31/2019 11:44 PM	Lightning	✓
13 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on on...	1/31/2019 11:44 PM	Lightning	✓
14 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	1/31/2019 11:44 PM	Classic	✓
15 Service	Service	Manage customer service with accounts, contacts, cases, and more	1/31/2019 11:44 PM	Classic	✓
16 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records a...	1/31/2019 11:44 PM	Lightning	✓
17 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com ...	1/31/2019 11:44 PM	Classic	

Step: 07

Click on drop down

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains a navigation menu with categories like Data, Apps, App Manager, Connected Apps, Installed Packages, Lightning Bolt, Mobile Apps, and Salesforce. The main content area displays a table of 17 installed apps, sorted by App Name. A callout box with the text "Click on drop down" points to the dropdown arrow in the 'Visibility' column of the 'Sales' app (row 12).

APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED	APP TYPE	VISIBILITY
3 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	1/31/2019 11:45 PM	Lightning	✓
4 Community	Community	Salesforce CRM Communities	1/31/2019 11:44 PM	Classic	✓
5 Content	Content	Salesforce CRM Content	1/31/2019 11:44 PM	Classic	✓
6 EdCast for Salesfor...	Edcast_App		2/1/2019 12:54 AM	Connected (Managed)	
7 Lightning Usage App	LightningInstrumentati...	View Adoption and Usage Metrics for Lightning Experience	1/31/2019 11:44 PM	Lightning	✓
8 Marketing	Marketing	Best-in-class on-demand marketing automation	1/31/2019 11:44 PM	Classic	✓
9 MyGuide	SalesU		2/1/2019 12:54 AM	Lightning (Managed)	✓
10 Platform	Platform	The fundamental Lightning Platform	1/31/2019 11:44 PM	Classic	
11 Sales	Sales	The world's most popular sales force automation (SFA) solution	1/31/2019 11:44 PM	Lightning	✓
12 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	1/31/2019 11:44 PM	Lightning	✓
13 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on on...	1/31/2019 11:44 PM	Lightning	✓
14 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	1/31/2019 11:44 PM	Classic	✓
15 Service	Service	Manage customer service with accounts, contacts, cases, and more	1/31/2019 11:44 PM	Classic	✓
16 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records a...	1/31/2019 11:44 PM	Lightning	✓
17 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com ...	1/31/2019 11:44 PM	Classic	

Step: 08

Click on "Edit"

The screenshot shows the Salesforce Lightning Experience App Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present with the text 'Search Setup'. The main content area is titled 'Lightning Experience App Manager' and contains a table of 17 items. The table columns are 'APP NAME', 'DEVELOPER NAME', 'DESCRIPTION', 'LAST MODIFIED', 'APP TYPE', and 'VISIBILITY'. The 'Sales Console' app is highlighted, and its 'Edit' button is circled in red. A callout box with the text 'Click on "Edit"' points to this button.

APP NAME	DEVELOPER NAME	DESCRIPTION	LAST MODIFIED	APP TYPE	VISIBILITY
2 App Launcher	AppLauncher	App Launcher tabs	9/7/2018 12:14 PM	Classic	✓
3 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/7/2018 12:14 PM	Lightning	✓
4 Community	Community	Salesforce CRM Communities	9/7/2018 12:14 PM	Classic	✓
5 Content	Content	Salesforce CRM Content	9/7/2018 12:14 PM	Classic	✓
6 EdCast for Salesforce	Edcast_App		9/20/2018 1:57 AM	Connected (Managed)	
7 GuideMe	SalesU		9/20/2018 1:57 AM	Lightning (Managed)	✓
8 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	9/7/2018 12:14 PM	Lightning	✓
9 Marketing	Marketing	Best-in-class on-demand marketing automation	9/7/2018 12:14 PM	Classic	✓
10 Platform	Platform	The fundamental Lightning Platform	9/7/2018 12:14 PM	Lightning	✓
11 Sales	Sales	The world's most popular sales force automation (SFA) solution	9/7/2018 12:14 PM	Lightning	✓
12 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	9/7/2018 12:14 PM	Lightning	✓
13 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	9/7/2018 12:14 PM	Lightning	✓
14 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	9/7/2018 12:14 PM	Classic	✓
15 Service	Service	Manage customer service with accounts, contacts, cases, and more	9/7/2018 12:14 PM	Classic	✓
16 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across custo...	9/7/2018 12:14 PM	Lightning	✓
17 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com application...	9/7/2018 12:14 PM	Classic	✓

Step: 09

Click on "Utility Items"

The screenshot displays the Lightning App Builder interface for configuring an app named "Sales". The top navigation bar includes "Lightning App Builder", "App Settings", "Pages", and "Sales". The left sidebar lists "APP SETTINGS" with sub-items: "App Details & Branding", "App Options", "Utility Items", "Navigation Items", "User Profiles", and "App Performance (Beta)". The "Utility Items" item is highlighted with a callout box that says "Click on 'Utility Items'".

The main content area is titled "App Details & Branding" and contains the following sections:

- App Name:** A text field containing "Sales".
- *Developer Name:** A text field containing "LightningSales".
- Description:** A text area containing "Manage your sales process with accounts, leads, opportunities, and more".
- App Branding:**
 - Image:** A placeholder for an app image with an "Upload" button.
 - Primary Color Hex Value:** A dropdown menu showing a blue color and a text field containing "#0070D2".
 - Org Theme Options:** A checkbox labeled "Use the app's image and color instead of the org's custom theme", which is currently unchecked.
- App Launcher Preview:** A preview card for the "Sales" app, showing a blue icon with a white lightning bolt and the text "Sales" and "Manage your sales process with accounts, leads, oppor...".

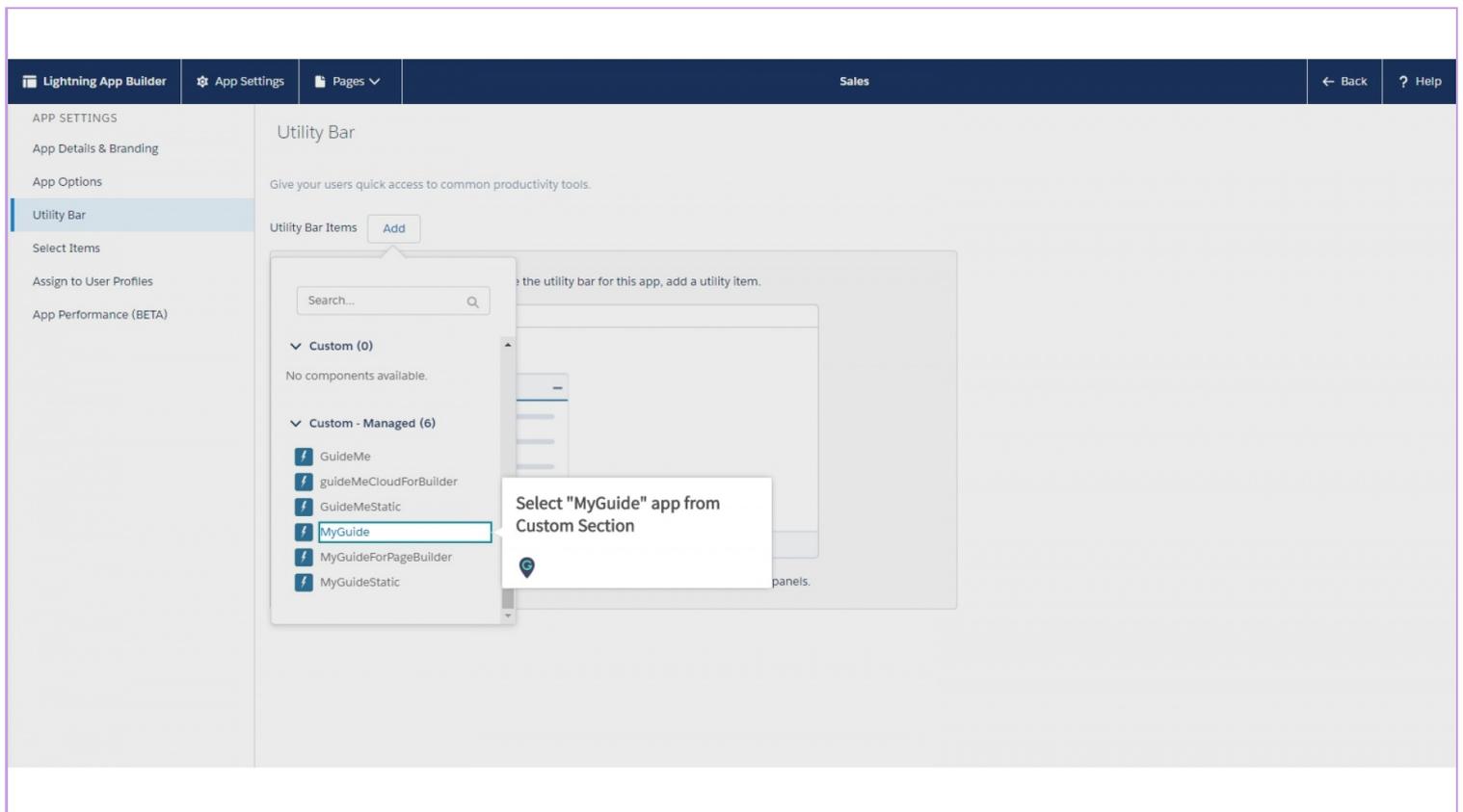
Step: 10

Click on "Add Utility Item"

The screenshot shows the Lightning App Builder interface. The top navigation bar includes "Lightning App Builder", "App Settings", "Pages", "Sales", "Back", and "Help". The left sidebar lists "APP SETTINGS" with sub-items: "App Details & Branding", "App Options", "Utility Items" (highlighted), "Navigation Items", "User Profiles", and "App Performance (Beta)". The main content area is titled "Utility Items" and contains the text: "Give your users quick access to frequently used app components by adding utility items to your app." A callout box with a pointer to the "Add Utility Item" button contains the text "Click on 'Add Utility Item'". Below the text is a visual example of a utility bar in a docked panel, showing a list of items and a utility bar with icons. The text below the example reads: "The utility bar is a fixed footer that opens components in docked panels. To enable the utility bar for this app, add a utility item."

Step: 11

Select "MyGuide" app from Custom Section



Step: 12

Utility Item Properties

Change the properties while adding Label: MyGuide Panel Width: 600 Panel Height: 500

The screenshot displays the Lightning App Builder interface. On the left, a sidebar lists 'APP SETTINGS' including 'App Details & Branding', 'App Options', 'Utility Items', 'Navigation Items', 'User Profiles', and 'App Performance (Beta)'. The main area is titled 'Utility Items' and contains an 'Add Utility Item' button. A 'MyGuide' utility item is currently selected, showing its properties in a panel on the right. A 'Utility Item Properties' dialog box is open, displaying the following information:

- Change the properties while adding
- Label: MyGuide
- Panel Width: 600
- Panel Height: 500

The dialog box also features a location pin icon and a 'Save' button. The main properties panel for the 'MyGuide' item includes:

- Label: MyGuide
- Icon: fallback X
- Panel Width: 340
- Panel Height: 480
- Start automatically:

Buttons for 'Cancel' and 'Save' are located at the bottom of the main properties panel.

Step: 13

Select this checkbox to start automatically

The screenshot shows the Lightning App Builder interface for configuring a utility item. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', 'Sales', 'Back', and 'Help'. The left sidebar lists 'APP SETTINGS' categories: 'App Details & Branding', 'App Options', 'Utility Items' (selected), 'Navigation Items', 'User Profiles', and 'App Performance (Beta)'. The main content area is titled 'Utility Items' and contains a 'Utility Item Properties' section with the following fields:

- * Label: MyGuide
- Icon: fallback X
- Panel Width: 500
- Panel Height: 600
- Start automatically
- Window Height: 100%

A callout box with a location pin icon and the text 'Select this checkbox to start automatically' is overlaid on the 'Start automatically' checkbox.

Step: 14

Click on "Save"

The screenshot shows the Lightning App Builder interface for configuring a Utility Bar. The top navigation bar includes "Lightning App Builder", "App Settings", "Pages", "Sales", "Back", and "Help". The left sidebar lists "APP SETTINGS" with sub-items: "App Details & Branding", "App Options", "Utility Bar" (selected), "Select Items", "Assign to User Profiles", and "App Performance (BETA)".

The main content area is titled "Utility Bar" and contains the instruction: "Give your users quick access to common productivity tools." Below this is a "Utility Bar Items" section with an "Add" button. A "MyGuide" utility item is currently selected, showing its properties:

- PROPERTIES** MyGuide (with up, down, and Remove buttons)
- Utility Item Properties**
 - *Label**: MyGuide
 - Icon**: lightning bolt fallback X
 - Panel Width**: 600
 - Panel Height**: 500
 - Load in background when app opens

A callout box with a location pin icon points to the "Save" button at the bottom right of the configuration area. The "Save" button is highlighted in blue, while the "Cancel" button is grey.

Step: 15

In a new tab, visit the home page of Salesforce and open that App

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 including Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. The main content area is divided into several sections:

- Quarterly Performance:** A line chart showing sales performance from January to March. The y-axis represents sales in millions of dollars, ranging from 0 to 2.5M. The x-axis shows the months Jan, Feb, and Mar. A blue line represents 'Closed + Open (>70%)', a green line represents 'Goal', and an orange line represents 'Closed'. The chart shows a steady increase in sales, reaching approximately 2.1M by March. A callout box in the center of the chart reads: "In a new tab, visit the home page of Salesforce and open that App".
- Assistant:** A panel on the right side of the dashboard displaying notifications. It includes two items: "Opportunity is overdue Grand Hotels Guest Portable Generators" and "30 days without any activity Edge Emergency Generator".
- Today's Events:** A section on the bottom left with a decorative illustration of a landscape with mountains and a sun.
- Today's Tasks:** A section on the bottom right with a decorative illustration of a person working at a desk. Below the illustration, it says "Nothing due today. Be a go-getter, and check back soon."

At the bottom left, there is a "MyGuide" link with a lightning bolt icon.

Step: 16

Woohoo! MyGuide Utility Bar is visible in your App!

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. Below this is a main navigation menu with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, and More. The main content area is divided into several sections:

- Quarterly Performance:** A line chart showing performance from July to September. The y-axis ranges from 0 to 3.6M. A horizontal goal line is set at 2.4M. The legend indicates 'Closed' (orange square), 'Goal' (green square), and 'Closed + Open (>70%)' (blue square). The chart shows a steady increase in performance, crossing the goal line in late August.
- Assistant:** A panel on the right side listing four items, each with a crown icon and a '30 days without any activity' warning. The items are: STARK, MyGuide - Microsoft - Q4 2018, Microsoft, and ACME.
- Today's Events:** A section with a blue icon and the text 'the rest of the day.'
- Today's Tasks:** A section with a blue icon and the text 'Nothing due today. Be a go-getter, and check back soon.'

A white notification box with a location pin icon is overlaid on the 'Today's Events' section, containing the text: 'Woohoo! MyGuide Utility Bar is visible in your App!'. At the bottom left of the dashboard, there is a blue button with a lightning bolt icon and the text 'MyGuide'.

Step: 17

Woohoo! MyGuide Utility Bar is visible in your App!

The screenshot displays a Salesforce dashboard with the following components:

- Quarterly Performance:** A line chart showing sales performance from January to February 2019. The y-axis ranges from 0 to 2.5M. A goal line is set at approximately 1.8M. The 'Closed + Open (>70%)' line shows a sharp increase in January, reaching the goal by the end of the month, and remains above the goal line through February. Summary statistics: CLOSED \$1,820,000, OPEN (>70%) \$270,000, GOAL --.
- Assistant:** A panel on the right side showing two notifications:
 - Opportunity is overdue: Grand Hotels Guest Portable Generators
 - 30 days without any activity: Edge Emergency Generator
- Today's Events:** A panel on the left containing a notification: "Woohoo! MyGuide Utility Bar is visible in your App!".
- Today's Tasks:** A panel on the right showing "Nothing due today. Be a go-getter, and check back soon."
- MyGuide Utility Bar:** A small blue bar at the bottom left corner with a lightning bolt icon and the text "MyGuide".

Thank You!

myguide.org