



How to update the keys of a MyGuide Account
inside Salesforce Lightning

Step: 01

Prerequisite

You need to generate your Org and Secret Key of MyGuide

The screenshot shows a Salesforce dashboard interface. 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, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. Below the navigation bar, the main dashboard area is divided into several sections. On the left, there is a 'Quarterly Performance' section with a line chart showing sales performance from January to March. The chart includes a goal line and a line for 'Closed + Open (>70%)'. A tooltip titled 'Prerequisite' is overlaid on the chart, stating: 'You need to generate your Org and Secret Key of MyGuide'. Below the chart are sections for 'Today's Events' and 'Today's Tasks'. On the right side of the dashboard, there is an 'Assistant' section with two notifications: 'Opportunity is overdue Grand Hotels Guest Portable Generators' and '30 days without any activity Edge Emergency Generator'. At the bottom left of the dashboard, there is a 'MyGuide' logo.

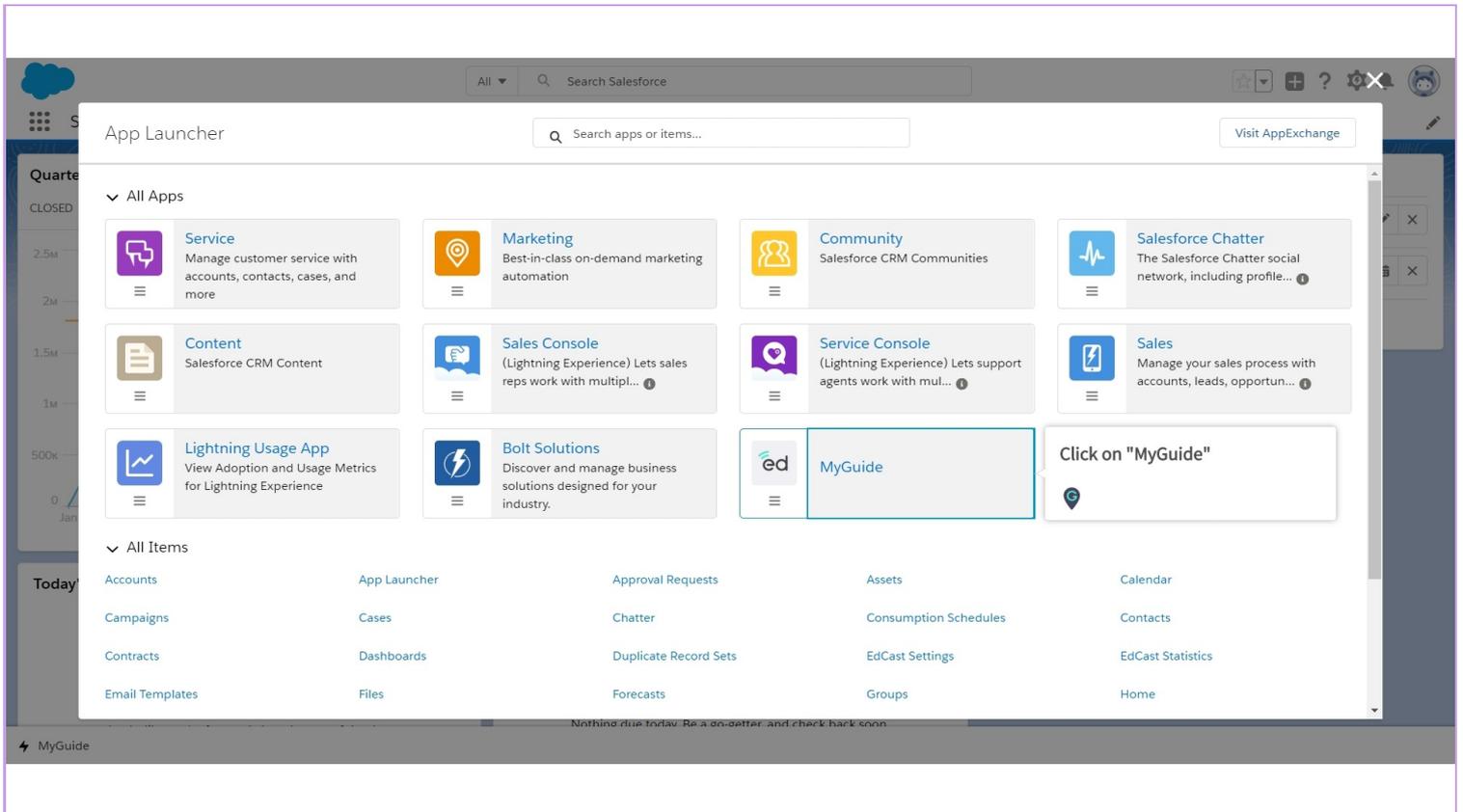
Step: 02

Click on App Launcher

The screenshot shows a Salesforce dashboard interface. At the top left, a callout box with a blue cloud icon and a grid of colored squares contains the text "Click on App Launcher" and a small location pin icon. The dashboard header includes a search bar with "Search Salesforce" and a navigation menu with items like "Tasks", "Files", "Accounts", "Contacts", "Campaigns", "Dashboards", "Reports", "Chatter", "Groups", "Calendar", and "More". The main content area is divided into several sections: "Quarterly Performance" with a line chart showing sales trends from January to March, including metrics for "CLOSED \$1,820,000", "OPEN (>70%) \$270,000", and "GOAL"; "Assistant" with two notifications: "Opportunity is overdue Grand Hotels Guest Portable Generators" and "30 days without any activity Edge Emergency Generator"; "Today's Events" with a scenic landscape illustration; and "Today's Tasks" with a construction site illustration and the text "Nothing due today. Be a go-getter, and check back soon." A "MyGuide" logo is visible in the bottom left corner of the dashboard area.

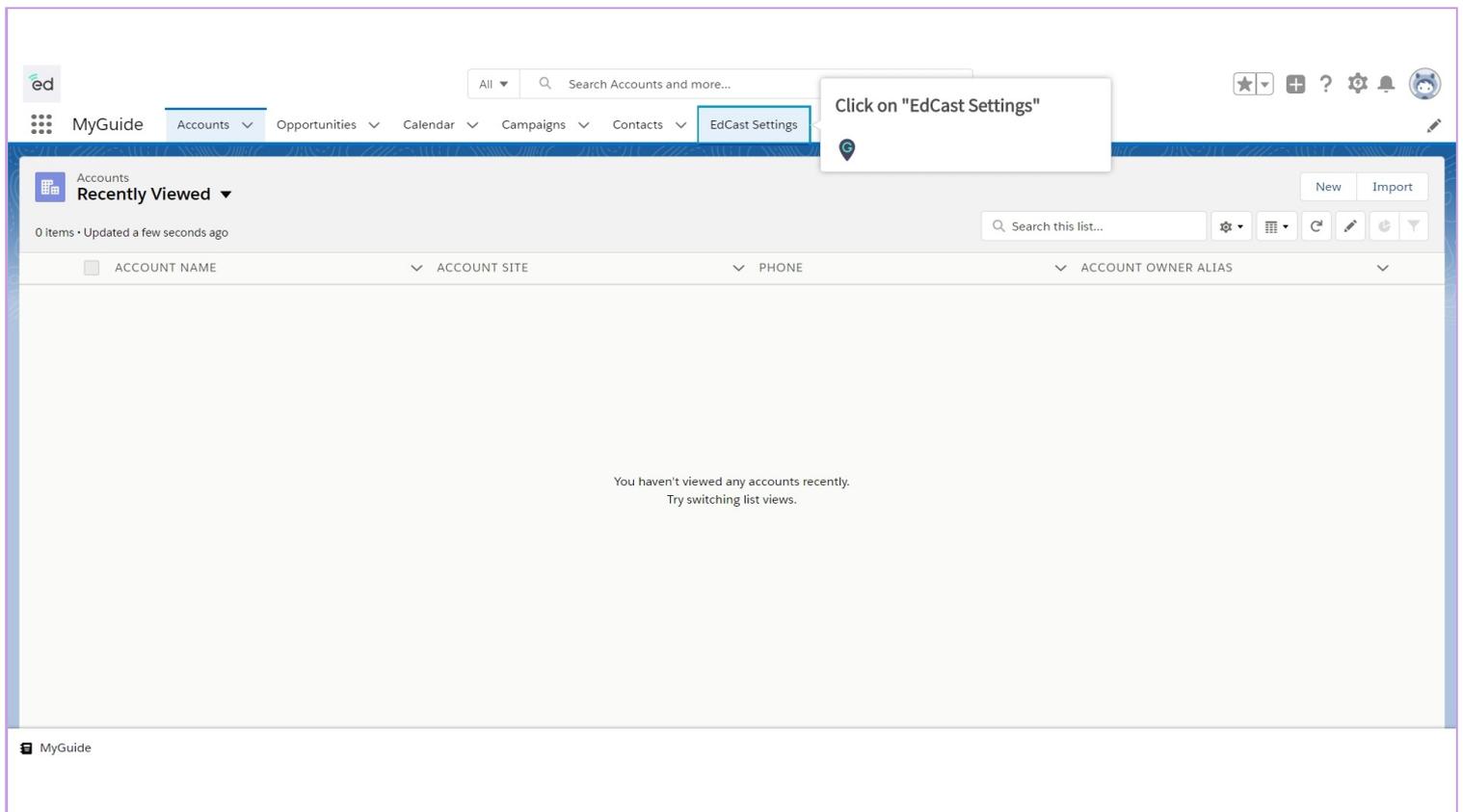
Step: 03

Click on "MyGuide"



Step: 04

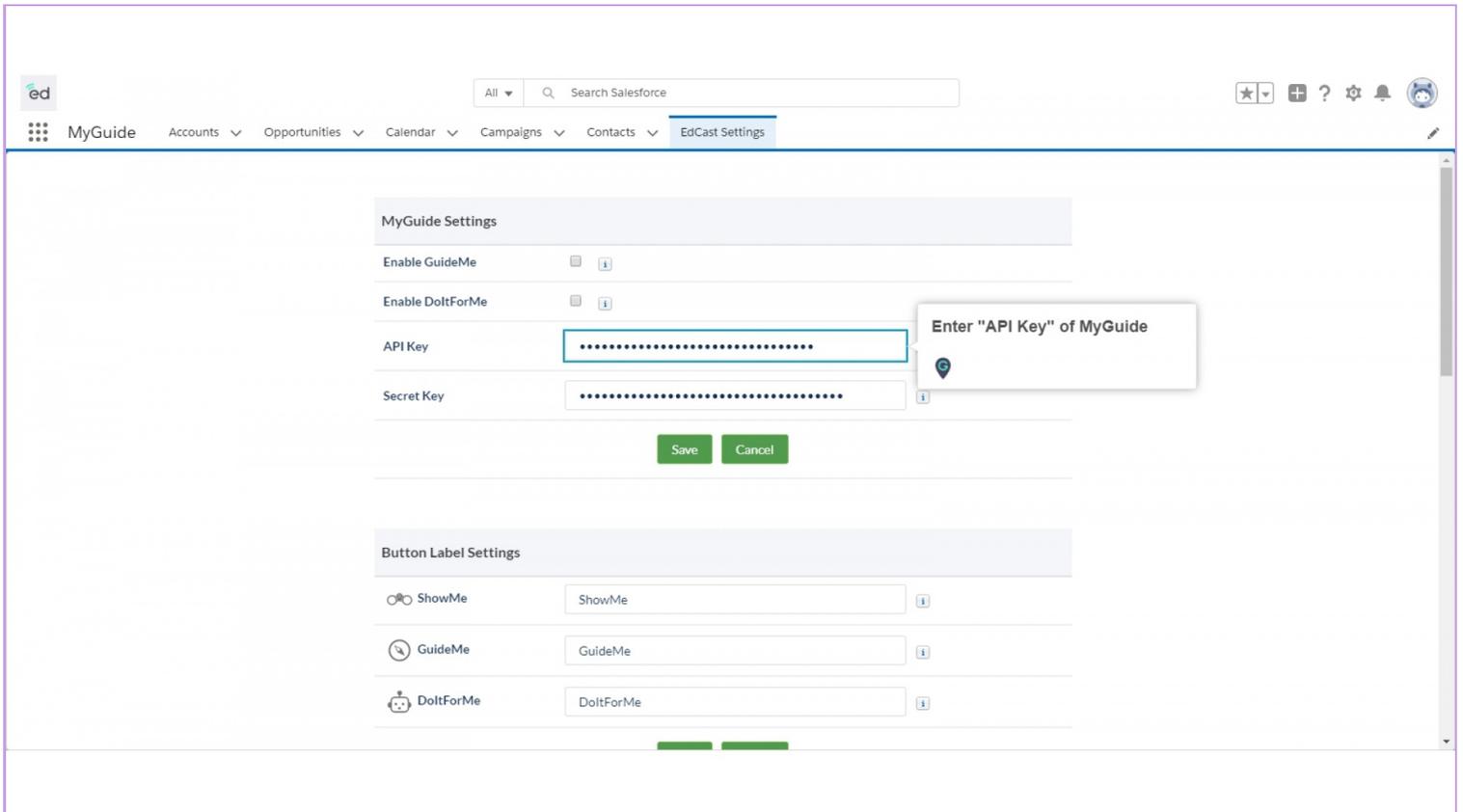
Click on "EdCast Settings"



The screenshot shows the MyGuide web application interface. At the top, there is a navigation bar with the MyGuide logo and several menu items: Accounts, Opportunities, Calendar, Campaigns, Contacts, and EdCast Settings. The EdCast Settings menu item is highlighted with a blue border. A white callout box with a blue location pin icon and the text "Click on 'EdCast Settings'" points to this menu item. Below the navigation bar, the main content area is titled "Accounts Recently Viewed" and shows a message: "0 Items • Updated a few seconds ago". Below this message is a table with columns for ACCOUNT NAME, ACCOUNT SITE, PHONE, and ACCOUNT OWNER ALIAS. The table is currently empty. At the bottom of the page, there is a footer with the MyGuide logo.

Step: 05

Enter "API Key" of MyGuide



The screenshot displays the Salesforce MyGuide settings interface. The top navigation bar includes the MyGuide logo, a search bar, and various menu items like Accounts, Opportunities, Calendar, Campaigns, and Contacts. The 'EdCast Settings' tab is active. The main content area is divided into two sections: 'MyGuide Settings' and 'Button Label Settings'. In the 'MyGuide Settings' section, the 'API Key' field is highlighted with a red border, and a callout box with the text 'Enter "API Key" of MyGuide' is positioned over it. Other fields include 'Enable GuideMe', 'Enable DoltForMe', and 'Secret Key'. The 'Button Label Settings' section contains three rows for 'ShowMe', 'GuideMe', and 'DoltForMe', each with a corresponding text input field. At the bottom of the 'MyGuide Settings' section, there are 'Save' and 'Cancel' buttons.

Step: 06

Enter "Secret Key" of MyGuide

The screenshot shows the Salesforce MyGuide settings page. The navigation bar includes 'MyGuide', 'Accounts', 'Opportunities', 'Calendar', 'Campaigns', 'Contacts', and 'EdCast Settings'. The 'MyGuide Settings' section contains the following fields:

- Enable GuideMe: ⓘ
- Enable DoltForMe: ⓘ
- API Key: ⓘ
- Secret Key: ⓘ

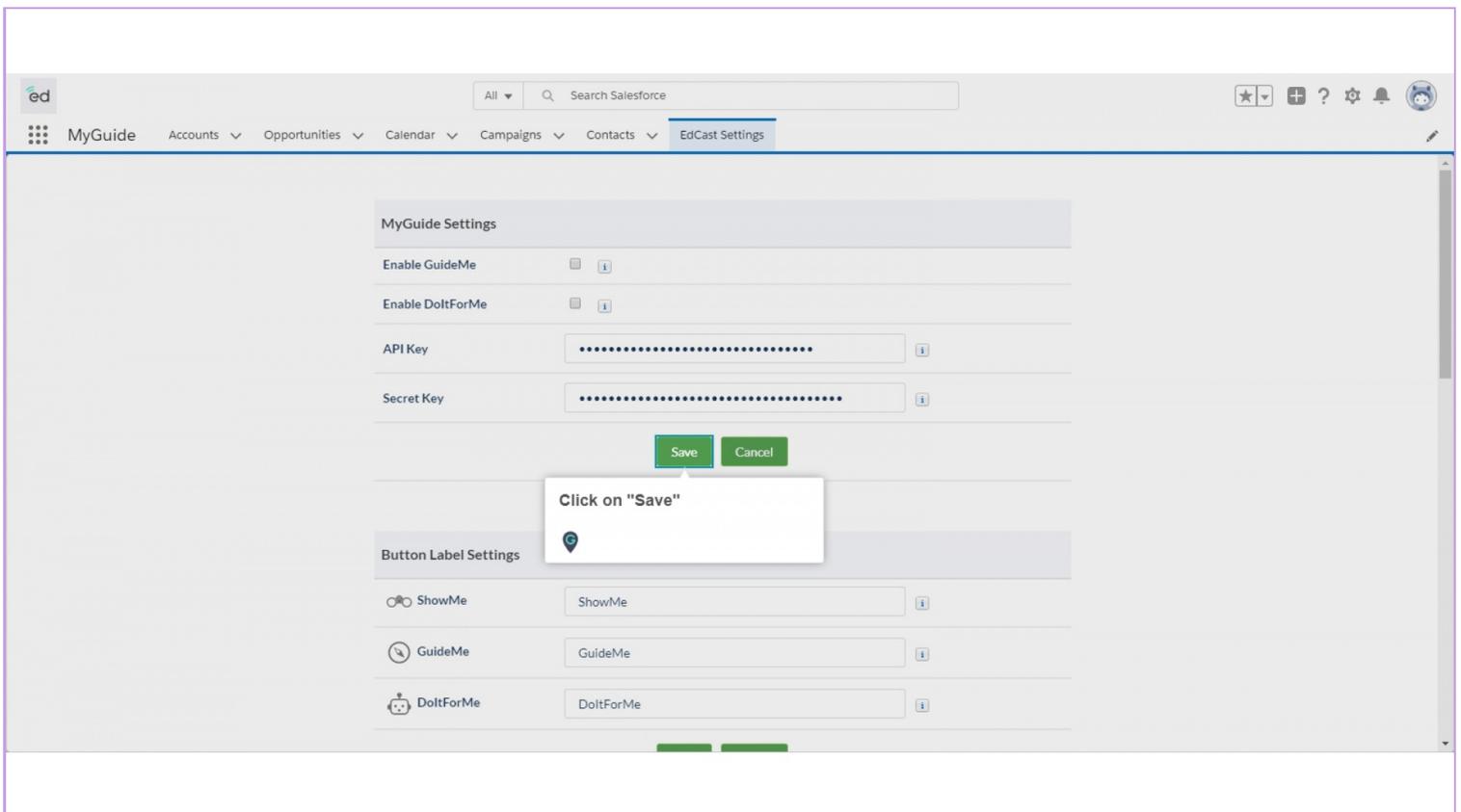
The 'Secret Key' field is highlighted with a blue border, and a callout box points to it with the text: "Enter 'Secret Key' of MyGuide". Below the 'MyGuide Settings' section is the 'Button Label Settings' section, which includes:

- ShowMe: ⓘ
- GuideMe: ⓘ
- DoltForMe: ⓘ

At the bottom of the 'MyGuide Settings' section, there are 'Save' and 'Cancel' buttons.

Step: 07

Click on "Save"



The screenshot shows the Salesforce MyGuide settings page. The page is titled "MyGuide Settings" and contains several configuration options:

- Enable GuideMe**: A checkbox that is currently unchecked.
- Enable DoltForMe**: A checkbox that is currently unchecked.
- API Key**: A text input field containing a series of dots, indicating a masked value.
- Secret Key**: A text input field containing a series of dots, indicating a masked value.

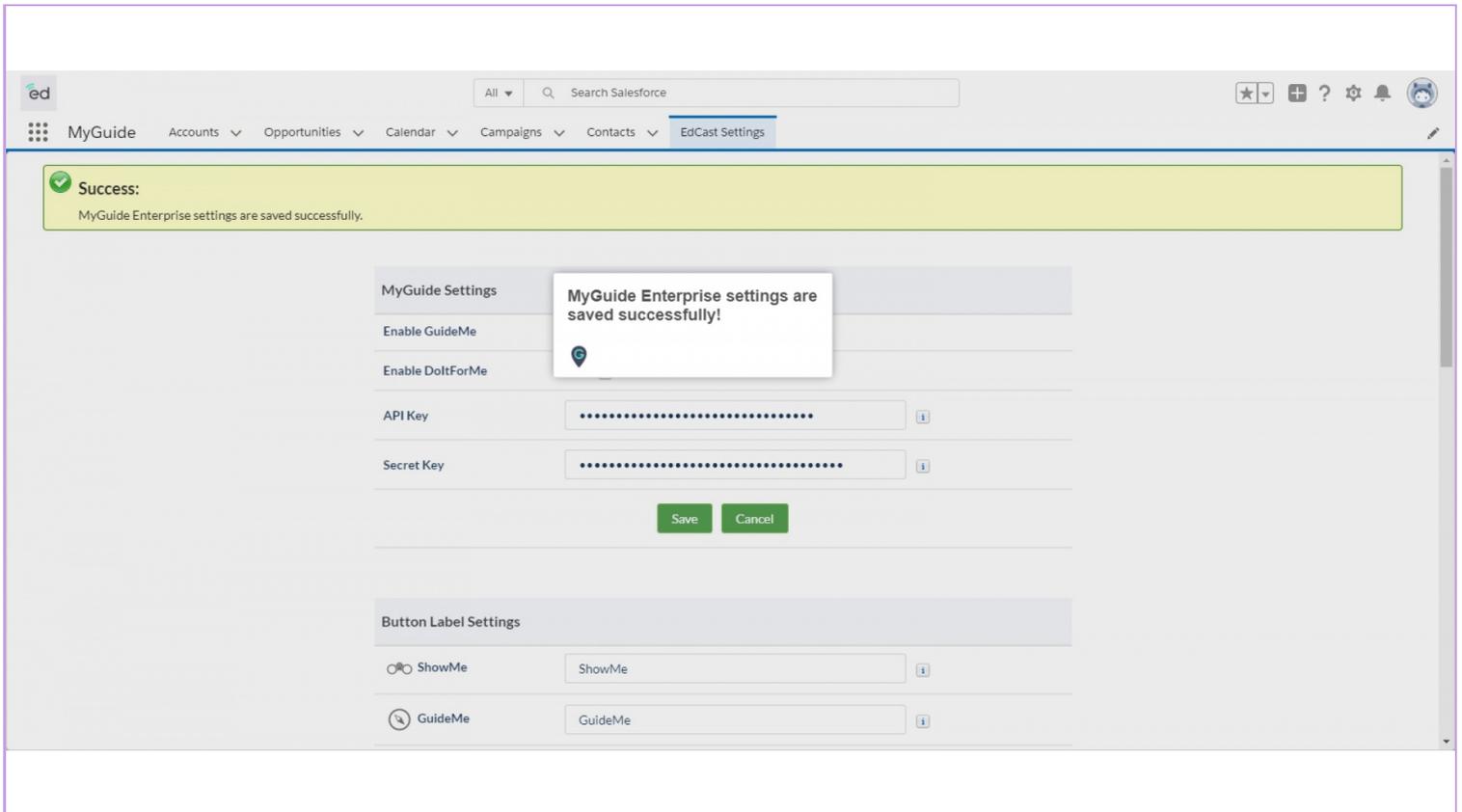
Below these settings are two buttons: "Save" and "Cancel". A tooltip is positioned over the "Save" button, displaying the text "Click on 'Save'" and a location pin icon. Below the "Save" and "Cancel" buttons is a section titled "Button Label Settings" which includes three rows of settings:

- ShowMe**: A text input field containing the value "ShowMe".
- GuideMe**: A text input field containing the value "GuideMe".
- DoltForMe**: A text input field containing the value "DoltForMe".

At the bottom of the page, there are two green buttons, likely for "Save" and "Cancel", which are partially obscured by the tooltip.

Step: 08

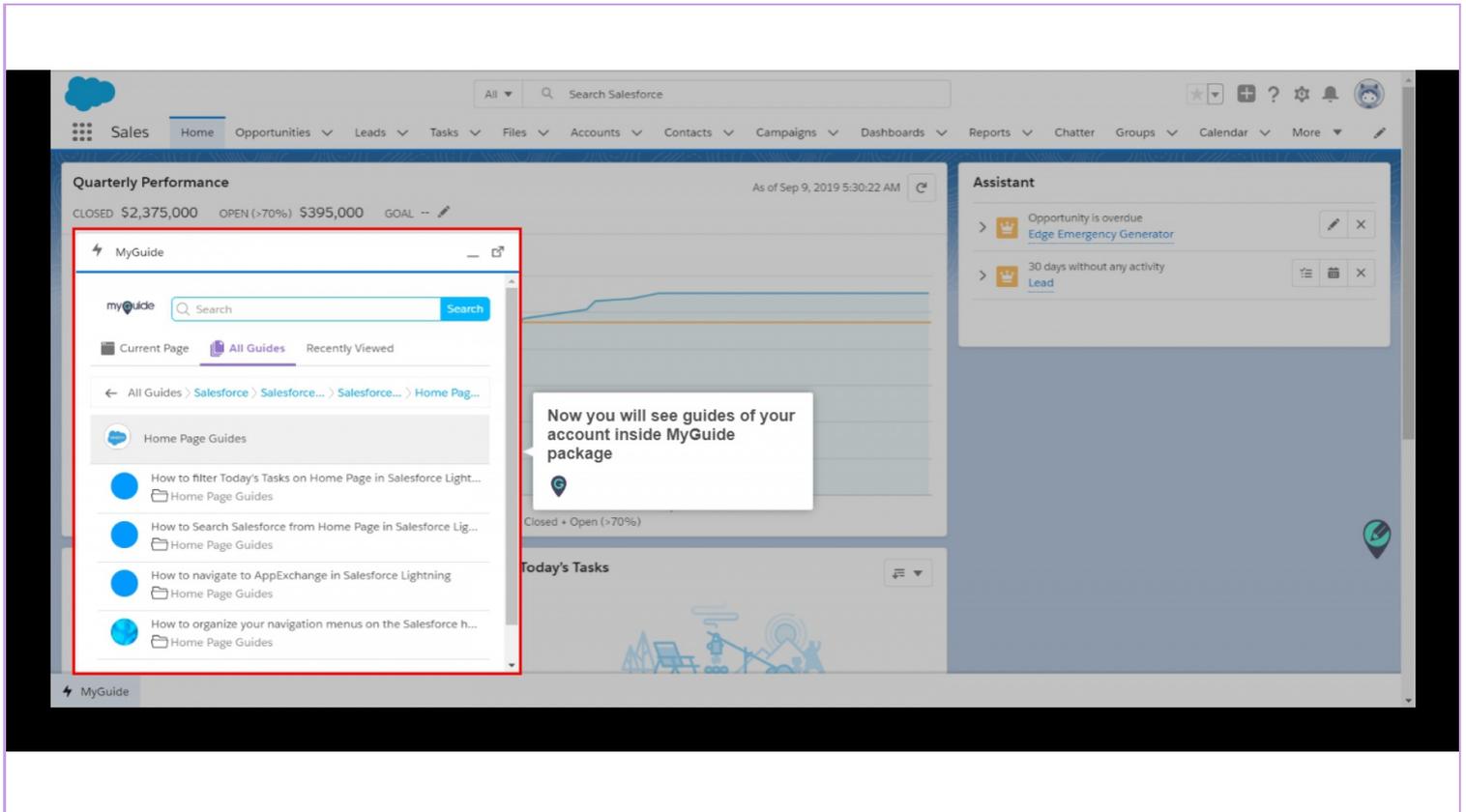
MyGuide Enterprise settings are saved successfully!



The screenshot displays the MyGuide Enterprise settings interface within a Salesforce environment. At the top, the navigation bar includes the MyGuide logo and menu items for Accounts, Opportunities, Calendar, Campaigns, Contacts, and EdCast Settings. A search bar for Salesforce is also visible. A prominent yellow success message at the top reads: "Success: MyGuide Enterprise settings are saved successfully." Below this, a white confirmation dialog box is centered on the screen, containing the text "MyGuide Enterprise settings are saved successfully!" and a location pin icon. The main settings area is divided into two sections: "MyGuide Settings" and "Button Label Settings". The "MyGuide Settings" section includes checkboxes for "Enable GuideMe" and "Enable DoltForMe", and text input fields for "API Key" and "Secret Key", both masked with dots. "Save" and "Cancel" buttons are positioned below these fields. The "Button Label Settings" section features radio buttons for "ShowMe" and "GuideMe", each with a corresponding text input field containing the label name.

Step: 09

Now you will see guides of your account inside MyGuide package



Thank You!

myguide.org