



Configure MyGuide Button for Opportunity Page

Step: 01

Welcome to MyGuide

In this Guide, we will learn how to configure MyGuide on Opportunity Page

The screenshot displays the Salesforce MyGuide interface on an Opportunity Page. 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. Below the navigation bar, the main content area is divided into several sections:

- Quarterly Performance:** A line chart showing performance from January to March. The Y-axis ranges from 0 to 120k. A blue line represents 'Closed + Open (>70%)', which rises sharply in January and levels off. A yellow horizontal line represents the 'Goal' at approximately 105k. A legend at the bottom identifies 'Closed' (yellow), 'Goal' (green), and 'Closed + Open (>70%)' (blue). Summary statistics show 'CLOSED \$105,000', 'OPEN (>70%) \$0', and a 'GOAL' icon.
- Welcome to MyGuide:** A central callout box with the text: "Welcome to MyGuide. In this Guide, we will learn how to configure MyGuide on Opportunity Page." A location pin icon is visible below the text.
- Assistant:** A panel on the right side with a tree and mountain illustration and the message: "Nothing needs your attention right now. Check back later."
- Today's Events:** A panel on the bottom left with a landscape illustration.
- Today's Tasks:** A panel on the bottom right with an illustration of people working.

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

Step: 02

Click on "Settings" icon

The screenshot shows the Salesforce dashboard interface. At the top left is the Salesforce logo. Below it is a navigation bar with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and Reports. A search bar labeled "Search Salesforce" is positioned to the right of the navigation bar. In the top right corner, there are icons for a gear (Settings), a bell (Notifications), and a user profile. A white callout box with a blue border and a pointer icon is positioned over the gear icon, containing the text "Click on 'Settings' icon". The main content area is divided into several sections: "Quarterly Performance" with a line chart showing sales data for January, February, and March; "Today's Events" and "Today's Tasks" sections with decorative icons; and an "Assistant" panel on the right with a message: "Nothing needs your attention right now. Check back later." The bottom left corner features a "MyGuide" logo.

Step: 03

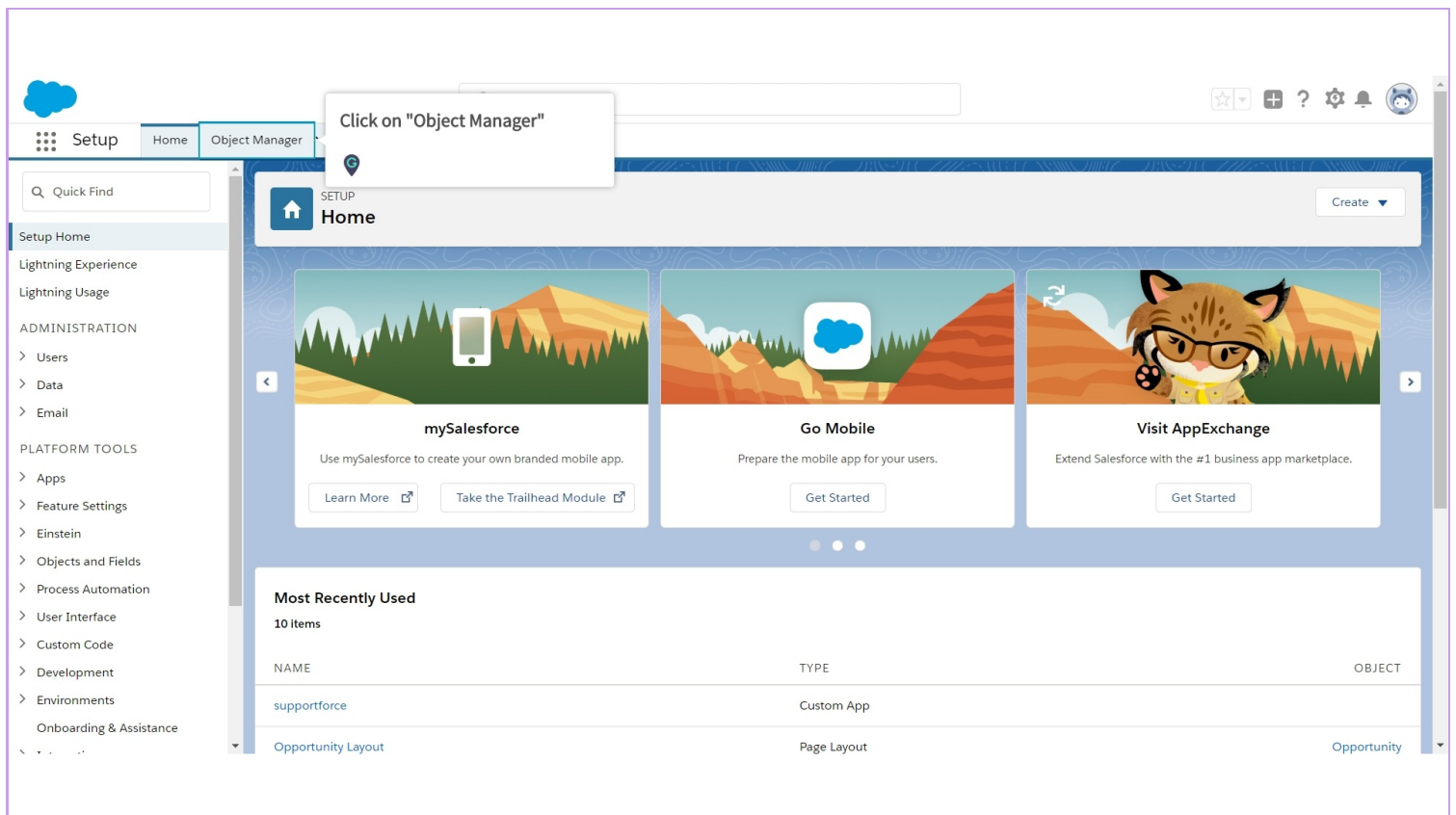
Click on "Setup"

It will open in a new tab

The screenshot shows the Salesforce dashboard interface. At the top, there is a navigation bar with the Salesforce logo, a search bar labeled "Search Salesforce", and a menu with items: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and Dashboards. Below the navigation bar, the main content area is divided into several sections. The top section is titled "Quarterly Performance" and displays a line chart showing sales performance from January to March. The chart includes a legend with "Closed", "Goal", and "Closed + Open (>70%)". Below the chart are sections for "Today's Events" and "Today's Tasks". At the bottom left, there is a "MyGuide" link. On the right side of the dashboard, the "Setup" menu is open, showing options: "Setup for current app", "Service Setup", "Developer Console", and "Edit Page". A tooltip is positioned over the "Setup" menu item, containing the text "Click on 'Setup'" and "It will open in a new tab". Below the menu, a notification states "Nothing needs your attention right now. Check back later."

Step: 04

Click on "Object Manager"



The screenshot shows the Salesforce Setup interface. At the top, there are tabs for "Setup", "Home", and "Object Manager". A callout box with the text "Click on 'Object Manager'" points to the "Object Manager" tab. Below the tabs is a search bar labeled "Quick Find". On the left side, there is a navigation menu with categories like "Setup Home", "ADMINISTRATION", "PLATFORM TOOLS", and "Onboarding & Assistance". 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 of items.

NAME	TYPE	OBJECT
supportforce	Custom App	
Opportunity Layout	Page Layout	Opportunity

Step: 05

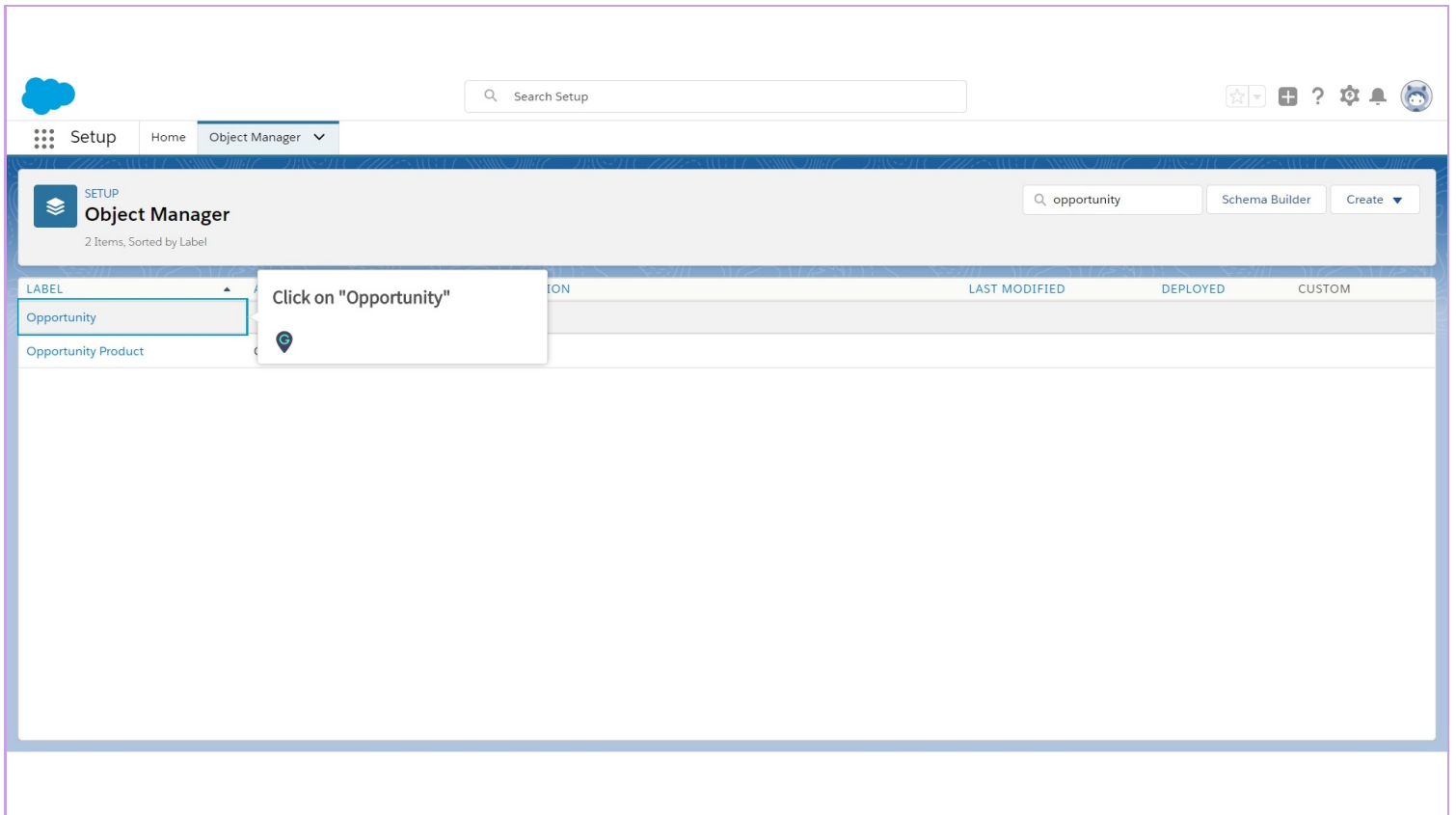
Enter "Opportunity" in quick find box

The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. A search bar labeled 'Search Setup' is visible. Below the navigation bar, the 'Object Manager' section is active, displaying '33 Items, Sorted by Label'. A callout box points to the 'Quick Find' search box, with the text 'Enter "Opportunity" in quick find box'. The main content area is a table with the following columns: LABEL, API NAME, DESCRIPTION, LAST MODIFIED, DEPLOYED, and CUSTOM. The table lists various object types such as Account, Activity, Asset, Campaign, Case, Contact, and Duplicate Record Set.

LABEL	API NAME	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
Account	Account				
Activity	Activity				
Asset	Asset				
Asset Relationship	AssetRelationship				
Campaign	Campaign				
Campaign Member	CampaignMember				
Case	Case				
Contact	Contact				
Content Version	ContentVersion				
Contract	Contract				
D&B Company	DandBCompany				
Duplicate Record Item	DuplicateRecordItem				
Duplicate Record Set	DuplicateRecordSet				

Step: 06

Click on "Opportunity"

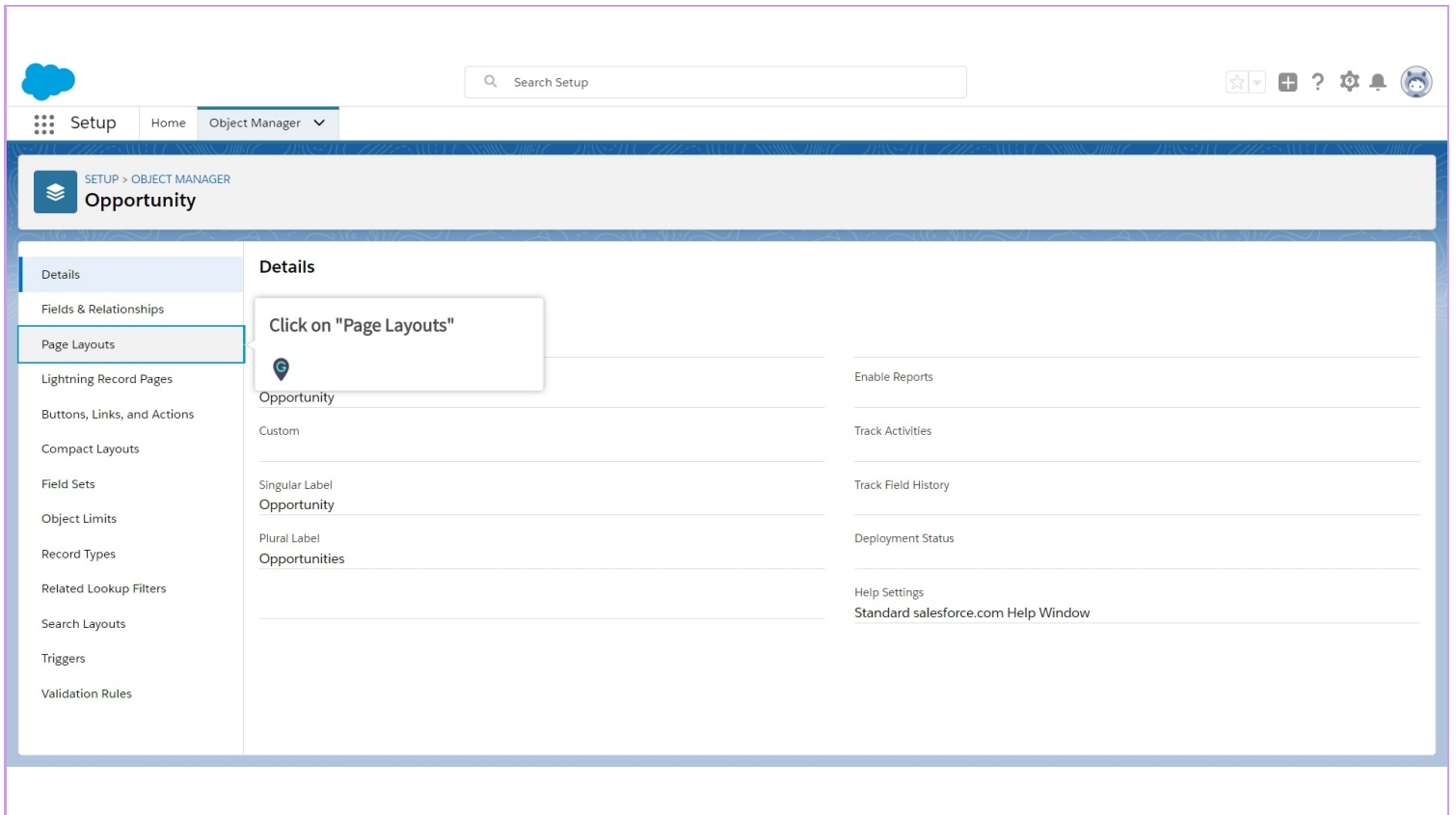


The screenshot displays the Salesforce Object Manager interface. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). A search bar labeled 'Search Setup' is visible. Below the navigation bar, the 'Object Manager' section is active, showing a search for 'opportunity' and buttons for 'Schema Builder' and 'Create'. A table lists objects, with 'Opportunity' selected in the 'LABEL' column. A callout box points to the 'Opportunity' row with the text 'Click on "Opportunity"'. The table headers include 'LABEL', 'DESCRIPTION', 'LAST MODIFIED', 'DEPLOYED', and 'CUSTOM'. The 'Opportunity Product' object is also visible below 'Opportunity'.

LABEL	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
Opportunity				
Opportunity Product				

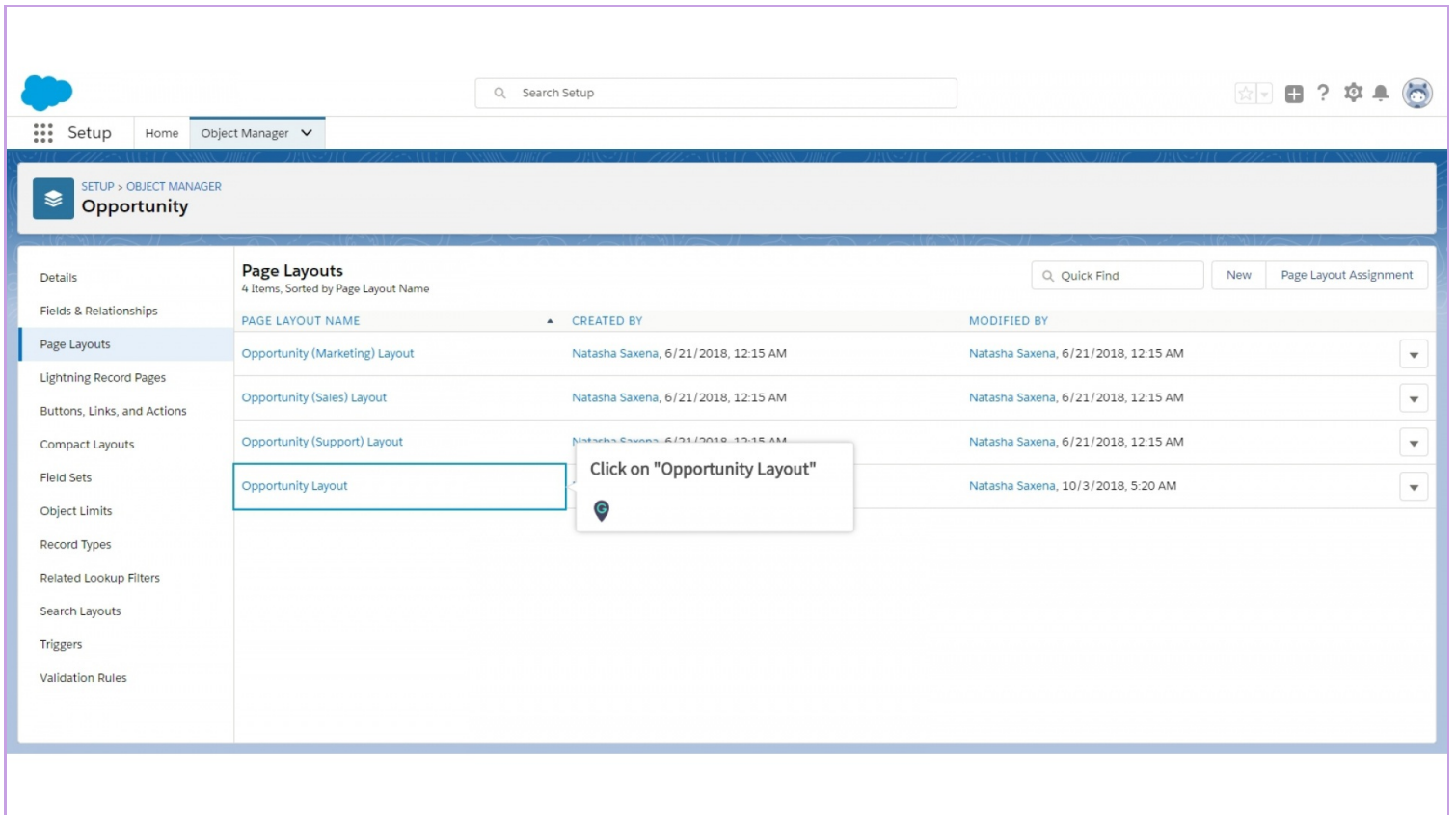
Step: 07

Click on "Page Layouts"



Step: 08

Click on "Opportunity Layout"



The screenshot shows the Salesforce Setup interface for the Opportunity object. The left sidebar contains a navigation menu with categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Triggers, and Validation Rules. The main content area is titled "Page Layouts" and shows a list of four page layouts. The "Opportunity Layout" is highlighted with a red box, and a callout box points to it with the text "Click on 'Opportunity Layout'".

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Opportunity (Marketing) Layout	Natasha Saxena, 6/21/2018, 12:15 AM	Natasha Saxena, 6/21/2018, 12:15 AM	▼
Opportunity (Sales) Layout	Natasha Saxena, 6/21/2018, 12:15 AM	Natasha Saxena, 6/21/2018, 12:15 AM	▼
Opportunity (Support) Layout	Natasha Saxena, 6/21/2018, 12:15 AM	Natasha Saxena, 6/21/2018, 12:15 AM	▼
Opportunity Layout	Natasha Saxena, 10/3/2018, 5:20 AM	Natasha Saxena, 10/3/2018, 5:20 AM	▼

Step: 09

Click on "Mobile & Lightning Actions"

The screenshot shows the Salesforce Setup interface for the Opportunity object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Triggers, and Validation Rules. The 'Mobile & Lightning Actions' item is highlighted with a blue bar. A callout box with a blue location pin icon points to this item and contains the text: "Click on 'Mobile & Lightning Actions'". The main content area shows the 'Opportunity Layout' configuration page, including a table of fields and a section for 'Salesforce Mobile and Lightning Experience Actions'.

Fields	Forecast Category	Main Competitor(s)	Order Number	Private	Time Spents (in m...
Buttons	Last Modified By	Next Step	Partner Account	Probability (%)	Tracking Number
Custom Links	Lead Source	Opportunity Name	Price Book	Quantity	Type
Quick Actions	Selected Revenue	Main Competitor(s)	Opportunity Owner	Primary Campaign ...	Stage

Opportunity Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher

Post File New Task Log a Call New Case New Note New Event Link Poll Question Email

Salesforce Mobile and Lightning Experience Actions

Post File New Task Log a Call New Case New Note New Event Link Poll Question Email Change Record Type

Clone Submit for Approval Delete Edit Change Owner Sharing

Step: 10

You will see the “MyGuide” button in the right palette

The screenshot displays the Salesforce Setup interface for the 'Opportunity' object. The left sidebar shows the navigation menu with 'Page Layouts' selected. The main content area shows the 'Opportunity' page layout configuration. A 'Quick Find' search box is visible, and a callout box highlights the 'MyGuide' button in the right palette. The page layout includes sections for 'Quick Actions in the Salesforce Classic Publisher', 'Salesforce Mobile and Lightning Experience Actions', and 'Opportunity Detail'. The 'Opportunity Detail' section shows standard buttons like 'Edit', 'Delete', 'Clone', 'Change Owner', 'Change Record Type', and 'Sharing', along with custom buttons 'MyGuide' and 'MyGuide InApp'. The 'Opportunity Information' table is also visible at the bottom.

Opportunity Information (Header visible on edit only)	
Opportunity Owner	Sample Text
Private	✓
Amount	\$123.45
Expected Revenue	\$123.45

Step: 11

Drag the “MyGuide” action from the right palette to the “Salesforce Mobile & Lightning Experience Actions”

The screenshot shows the Salesforce Setup interface for editing the Opportunity page layout. The left sidebar contains navigation options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Triggers, and Validation Rules. The main area displays the 'Opportunity' page layout editor. A tooltip with the text 'Drag the “MyGuide” action from the right palette to the “Salesforce Mobile & Lightning Experience Actions” section of the page' is overlaid on the interface. The page layout editor shows various sections: 'Quick Actions in the Salesforce Classic Public Interface', 'Salesforce Mobile and Lightning Experience Actions', and 'Opportunity Detail'. The 'Salesforce Mobile and Lightning Experience Actions' section contains buttons for Post, File, New Task, MyGuide, Log a Call, New Case, New Note, New Event, Link, Poll, Question, and Email. The 'Opportunity Detail' section contains buttons for Edit, Delete, Clone, Change Owner, Change Record Type, Sharing, MyGuide, and MyGuide InApp. The bottom of the page shows the Opportunity record information, including Opportunity Owner, Amount (\$123.45), and Expected Revenue (\$123.45).

Step: 12

Click on "Save"

The screenshot shows the Salesforce Setup interface for configuring the Opportunity object layout. The left sidebar contains navigation options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Triggers, and Validation Rules. The main content area displays the 'Opportunity Sample' layout editor. At the top left of the editor is a 'Save' button. A callout box with the text 'Click on "Save"' points to this button. Below the 'Save' button is a 'Layout Properties' section with a table of field sets. The table has columns for Section, Attachment Amount, Current Generator(s), Forecast Category, Main Competitor(s), Order Number, Private, and Time Spents (in m...). The rows include 'Blank Space', 'Close Date', 'Delivery/Installa...', 'Last Modified By', 'Next Step', 'Partner Account', 'Probability (%)', and 'Tracking Number'. Below the table are sections for 'Quick Actions in the Salesforce Classic Publisher' and 'Salesforce Mobile and Lightning Experience Actions', each containing a row of buttons for various actions like Post, File, New Task, Log a Call, New Case, New Note, New Event, Link, Poll, Question, Email, and Change Record Type.

Step: 13

Now open any "Opportunity" and you will see the MyGuide Button

The screenshot displays the Salesforce CRM interface for an Opportunity record. The top navigation bar includes 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. The main content area shows the Opportunity details for "test", including fields for Account Name, Close Date (1/10/2019), Amount, and Opportunity Owner (Deeksha Khaira). A callout box highlights the "MyGuide" button in the top right corner of the record view. Below the record details, there is a "New Task" section with options for Log a Call, New Event, and Email, and a "Next Steps" section with a "More Steps" button. The right sidebar contains a "Search Guides" section, a "Current Page" section, and sections for "Products (0)" and "Notes & Attachments (0)".

Thank You!

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