



Configure MyGuide as Custom Page

# Step: 01

## Welcome to MyGuide

In this Guide we will learn how to configure MyGuide as Custom page

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 data for 'Closed' and 'Closed + Open (>70%)' categories. A 'Welcome to MyGuide' pop-up window is overlaid on the chart, containing the text: 'Welcome to MyGuide. In this Guide we will learn how to configure MyGuide as Custom page'. To the right of the chart is an 'Assistant' section with three items: 'Opportunity is overdue Grand Hotels Guest Portable Generators', '30 days without any activity Edge Emergency Generator', and '30 days without any activity MyGuide'. Below the chart are 'Today's Events' and 'Today's Tasks' sections, both with placeholder icons. At the bottom left, there is a 'MyGuide' widget icon.

# Step: 02

Click on "Leads"

The screenshot displays the MyGuide CRM dashboard. At the top, a navigation bar includes 'Sales', 'Home', 'Opportunities', and 'Leads'. A callout box labeled 'Click on "Leads"' points to the 'Leads' tab. The main dashboard area is divided into several sections:

- Quarterly Performance:** A line chart showing sales performance from January to March. The y-axis ranges from 0 to 2.5M. The chart includes a blue line for 'Closed + Open (>70%)', a green line for 'Goal', and an orange line for 'Closed'. Summary statistics show 'CLOSED \$1,820,000' and 'OPEN (>70%) \$270,000'. The chart is dated 'As of Today 12:28:59 AM'.
- Assistant:** A panel on the right side of the dashboard listing recent events and tasks, such as 'New lead assigned to you today Khaira', 'Opportunity is overdue Grand Hotels Guest Portable Generators', and '30 days without any activity Edge Emergency Generator'.
- Today's Events:** A section with a decorative illustration of a mountain range and a sun.
- Today's Tasks:** A section with a decorative illustration of a person working at a desk, with the text 'Nothing due today. Be a go-getter, and check back soon.'

At the bottom left, there is a 'MyGuide' logo with a lightning bolt icon.

# Step: 03

## Select a Lead or Create a new one

The screenshot shows a CRM interface with a navigation menu at the top including Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and Calendar. The 'Leads' section is active, displaying a 'Recently Viewed' list with one item: 'Khaira' from 'EdCast' with a status of 'Open - Not Contacted' and owner 'DKhai'. A callout box with a location pin icon prompts the user to 'Select a Lead or Create a new one'.

NAME	TITLE	COMPANY	PHONE	MOBILE	EMAIL	LEAD STATUS	OWNER ALIAS
1	Khaira	EdCast				Open - Not Contacted	DKhai

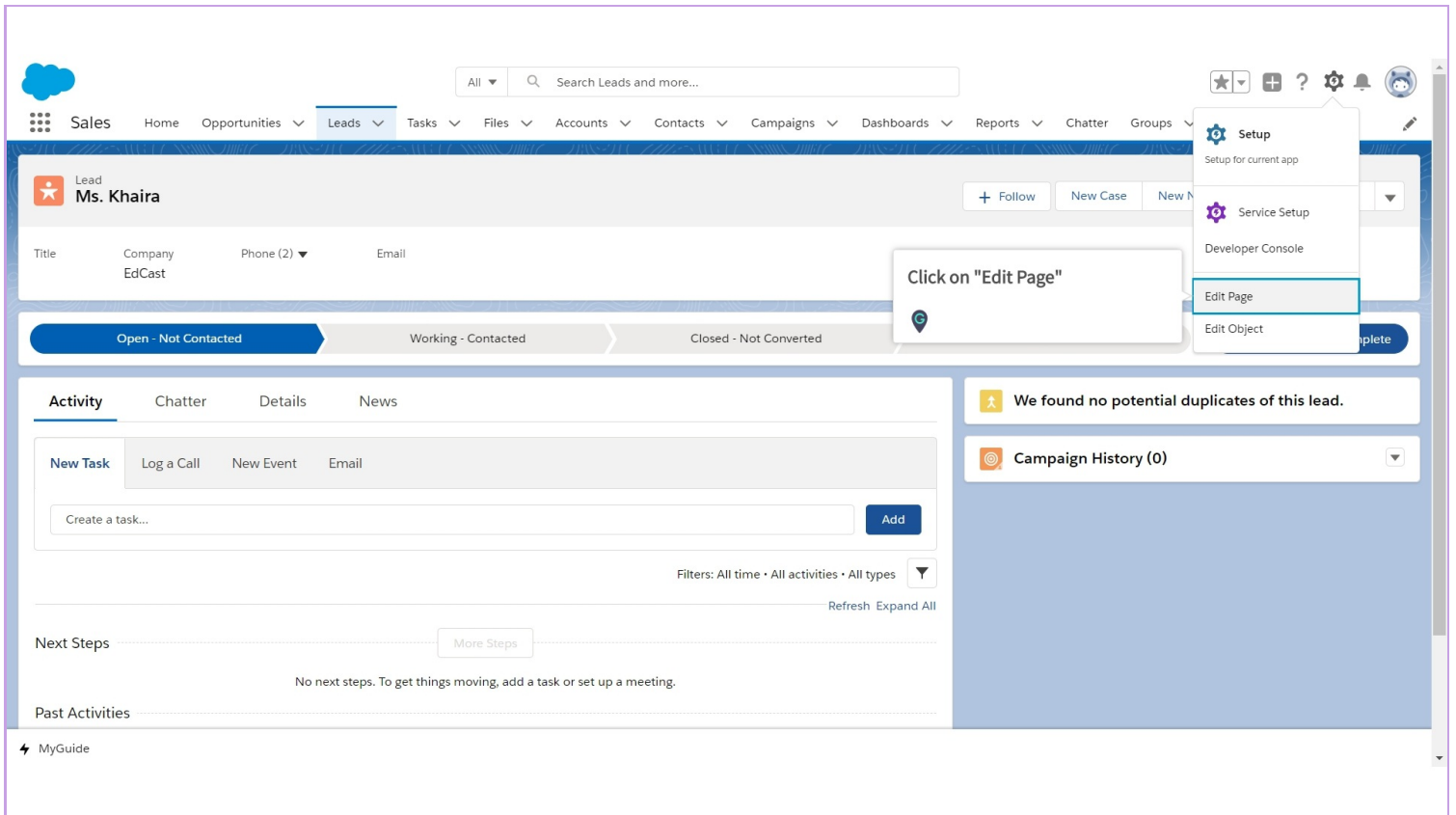
# Step: 04

Click on gear cog icon

The screenshot displays the Salesforce CRM interface for a lead record. At the top, there is a navigation bar with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and Reports. A search bar is located in the top right. A callout box with the text "Click on gear cog icon" points to the gear icon in the top right corner. Below the navigation bar, the lead record for "Ms. Khaira" is shown, including fields for Title, Company (EdCast), Phone (2), and Email. A status bar indicates the lead is "Open - Not Contacted". The main content area is divided into sections: "Activity" (with sub-tabs for Chatter, Details, News), "New Task" (with options for Log a Call, New Event, Email), "Filters" (All time, All activities, All types), "Next Steps" (No next steps), and "Past Activities". A right-hand sidebar contains a message: "We found no potential duplicates of this lead." and a "Campaign History (0)" section.

# Step: 05

Click on "Edit Page"



## Step: 06

### Go to "Custom - Managed"

The screenshot displays the Salesforce Lightning App Builder interface for a "Lead Record Page". The main workspace shows a lead record for "Ms. Khaira" with fields for Title, Company (EdCast), Phone (2), and Email. Below the lead record is a progress bar with stages: Open - Not Contacted, Working - Contacted, Closed - Not Converted, and Converted. A "Mark Status as Complete" button is visible. The "Activity" section includes a "New Task" form with options for Log a Call, New Event, and Email. A "Next Steps" section is also present. A callout box with a location pin icon and the text "Go to 'Custom - Managed'" is overlaid on the activity section.

On the left, the "Lightning Components" panel is visible, showing a search bar and a list of components. Under the "Custom (0)" section, "No components available." is displayed. Under the "Custom - Managed (3)" section, three components are listed: MyGuide, MyGuideForPageBuilder, and MyGuideStatic.

On the right, the "Page" configuration panel is shown, with fields for Label (Lead Record Page), Developer Name (Lead\_Record\_Page), Page Type (Record Page), Object (Lead), Template (Header, Subheader, Right Sidebar), and Description.

## Step: 07

Drag "MyGuide" into regions to customize your page

The screenshot displays the Salesforce Lightning App Builder interface for configuring a 'Lead Record Page'. On the left, the 'Lightning Components' palette is visible, with the 'MyGuide' component highlighted under the 'Custom - Managed (3)' section. A callout box with a location pin icon points to the 'MyGuide' component, containing the text: 'Drag "MyGuide" into regions to customize your page'. The main preview area shows a lead record for 'Ms. Khaira' with various tabs and a 'Next Steps' section. The right sidebar shows configuration options for the page, including Label, Developer Name, Page Type, Object, Template, and Description.



# Step: 08

## Click on "Save"

When you finish with configuring your page, save it

The screenshot displays the Lightning App Builder interface for configuring a 'Lead Record Page'. At the top, the title bar shows 'Lightning App Builder', 'Pages', and 'Lead Record Page'. A callout box with a location pin icon contains the text: 'Click on "Save" When you finish with configuring your page, save it'. Below the title bar, there are navigation buttons: 'Back', 'Help', 'Save', and 'Activation...'. The main workspace is divided into three sections:

- Lightning Components:** A sidebar on the left with a search bar and a list of 27 standard components including Accordion, Activities, Chatter, Chatter Feed, Chatter Publisher, Flow, Guided Action List, Highlights Panel, List View, Path, Potential Duplicates, Quip, Recent Items, Recommendations, Record Detail, and Related List - Single.
- Preview:** A central area showing a mockup of the lead record page for 'Ms. Khaira'. It includes a header with contact information, a status bar with 'Open - Not Contacted', 'Working - Contacted', 'Closed - Not Converted', and 'Converted' stages, and a main content area with 'Activity', 'Chatter', 'Details', and 'News' tabs. The 'Activity' tab is active, showing a 'New Task' section and 'Next Steps'.
- Configuration Panel:** A right-hand panel with the following fields:
  - Label:** Lead Record Page
  - Developer Name:** Lead\_Record\_Page
  - Page Type:** Record Page
  - Object:** Lead
  - Template:** Header, Subheader, Right Sidebar
  - Description:** (Empty text area)

# Step: 09

## Click on "Activate"

Activate this page to make it visible to users

The screenshot shows the Lightning App Builder interface for an 'Opportunity Record Page'. A 'Page Saved' dialog box is displayed in the center, with the following text: 'Page Saved', 'Activate this page to make it visible to your users.', 'Activate the page now, or do it later using the Activation button in the App Builder toolbar.', and a checkbox for 'Don't show me this message again'. The dialog box has two buttons: 'Not Yet' and 'Activate'. A callout box points to the 'Activate' button with the text: 'Click on "Activate"', 'Activate this page to make it visible to users'. The background shows the app builder toolbar with 'Save' and 'Activation...' buttons, and a sidebar with 'Lightning Components'.

# Step: 10

## Click on "Assign as Org Default"

To set this page as the org default to display it for all Lead records

The screenshot shows the Lightning App Builder interface with a dialog box titled "Activation: Lead Record Page". The dialog contains the following text:

Custom record pages can be assigned at different levels:

- The org default** record page displays for an object unless more specific assignments are made.
- App default** page assignment, if specified, overrides the org default.
- App, record type, profile** assignments override org and app defaults.

[Learn more about Lightning page assignment.](#)

**ORG DEFAULT**    APP DEFAULT    APP, RECORD TYPE, AND PROFILE

Set this page as the org default to display it for all Lead records, except when app default or app, record type, or profile-specific assignments are defined.

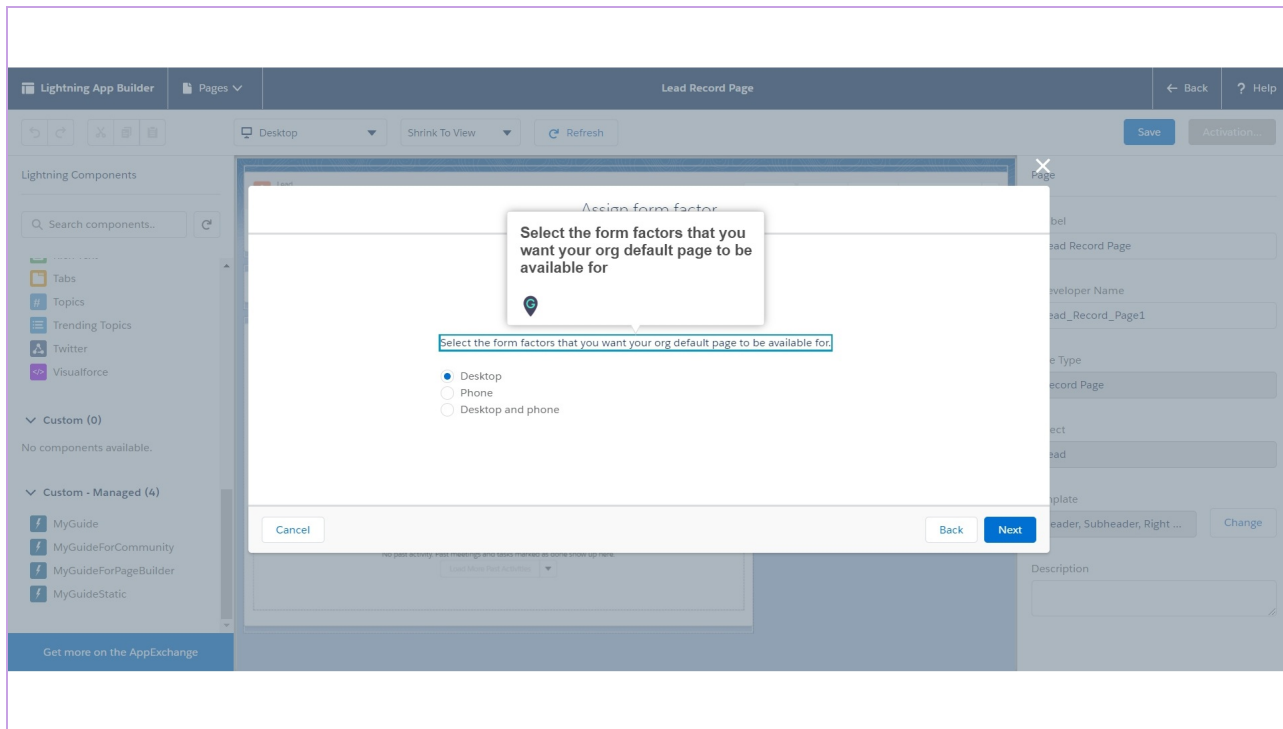
**Info:** In standard Salesforce console apps, some objects have a system app default record page. For those objects, if you assign a custom org default page, it doesn't display to users. To enable a custom org default page to show up in the console for those objects, assign a custom page as the app default.

**Assign as Org Default** button: Click on "Assign as Org Default" To set this page as the org default to display it for all Lead records

**Close** button

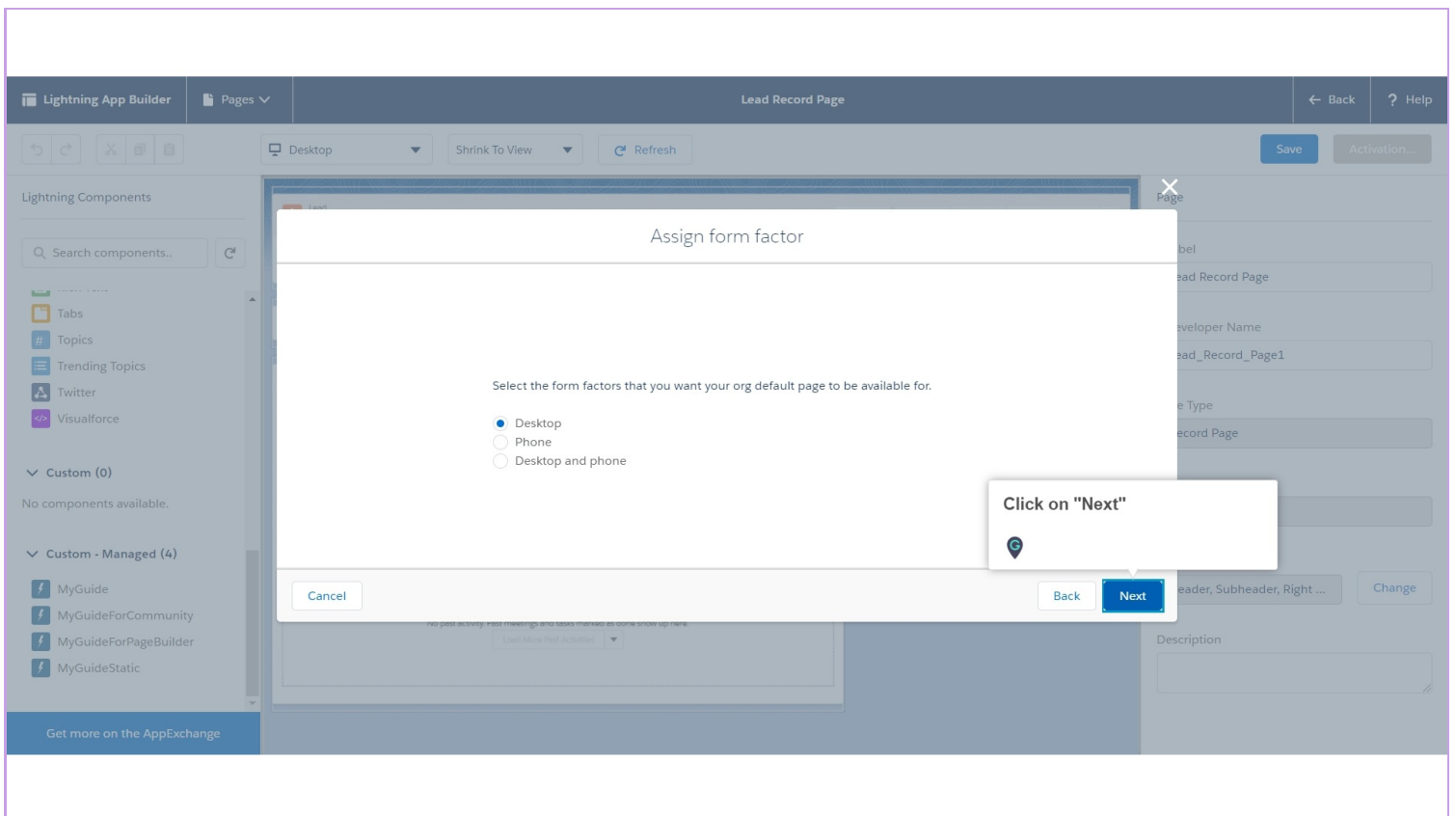
## Step: 11

Select the form factors that you want your org default page to be available for



## Step: 12

Click on "Next"



# Step: 13

Click on "save"

The screenshot shows the Lightning App Builder interface for a 'Lead Record Page'. A modal dialog titled 'Set as Org Default: Lead Record Page' is open, prompting the user to set this page as the org default. The dialog includes a table with the following data:

Review Assignments (1)			
CURRENT ORG DEFAULT	LAST MODIFIED	NEW ORG DEFAULT	LAST MODIFIED
System Default	-	Lead Record Page	Deeksha Khaira Feb 1, 2019

A callout box with a location pin icon and the text 'Click on "save"' points to the 'Save' button in the dialog. The background shows the Lightning Components sidebar on the left and the page configuration area on the right.

## Step: 14

Now go back to any "Lead" page of that App to see MyGuide custom page

The screenshot displays a Salesforce interface for a lead record. At the top, the navigation bar includes 'Sales', 'Home', and various menu items like 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', 'Calendar', and 'More'. The lead record for 'Ms. Khaira' is shown with fields for 'Title', 'Company' (EdCast), 'Phone (2)', and 'Email'. Below the record, there are tabs for 'Open - Not Contacted', 'Working - Contacted', 'Closed - Not Converted', and 'Converted'. A 'New Task' section offers options like 'Log a Call', 'New Event', and 'Email'. A 'Next Steps' section indicates 'No next steps. To get things moving, add a task or set up a meeting.' On the right, a 'MyGuide' custom page is visible, featuring a search bar and a message: 'We found no potential duplicates of this lead.' A tooltip is overlaid on the page, stating: 'Now go back to any "Lead" page of that App to see MyGuide custom page'.

# Thank You!

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