



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 displays the Salesforce MyGuide 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. The main content 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 data for Closed sales (\$1,820,000), Open sales (>70% at \$270,000), and a Goal line. A legend at the bottom identifies the lines: Closed (orange), Goal (green), and Closed + Open (>70%) (blue). A callout box titled "Welcome to MyGuide" is overlaid on the chart, stating: "In this Guide we will learn how to configure MyGuide as Custom page".
- Assistant:** A panel on the right side of the dashboard displaying three notifications:
 - Opportunity is overdue: Grand Hotels Guest Portable Generators
 - 30 days without any activity: Edge Emergency Generator
 - 30 days without any activity: MyGuide
- Today's Events:** A section with a decorative graphic of a mountain range and a sun.
- Today's Tasks:** A section with a decorative graphic of a person working at a desk. Below the graphic, it says "Nothing due today. Be a go-getter, and check back soon."

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

Step: 02

Click on "Leads"

The screenshot shows a CRM dashboard interface. At the top, there is a navigation bar with a search bar and several menu items: Sales, Home, Opportunities, Leads, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. A tooltip with the text "Click on 'Leads'" is positioned over the "Leads" menu item. 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 trends from January to March. The chart includes data for "Closed" (orange line), "Goal" (green line), and "Closed + Open (>70%)" (blue line). Above the chart, it displays "CLOSED \$1,820,000" and "OPEN (>70%) \$270,000". Below the chart are "Today's Events" and "Today's Tasks" sections, both featuring icons and a "MyGuide" logo. On the right side of the dashboard, there is an "Assistant" panel with a list of notifications, including "New lead assigned to you today" for "Khaira", "Opportunity is overdue" for "Grand Hotels Guest Portable Generators", and two "30 days without any activity" notifications for "Edge Emergency Generator" and "MyGuide".

Step: 03

Select a Lead or Create a new one

The screenshot shows a CRM interface with a navigation bar at the top containing 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', 'Calendar', and 'More'. A search bar is located in the top right. Below the navigation bar, the 'Leads' section is active, displaying 'Recently Viewed' with 1 item. The table below has columns for NAME, TITLE, COMPANY, PHONE, MOBILE, EMAIL, LEAD STATUS, and OWNER ALIAS. A callout box with a location pin icon and the text 'Select a Lead or Create a new one' is overlaid on the table.

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

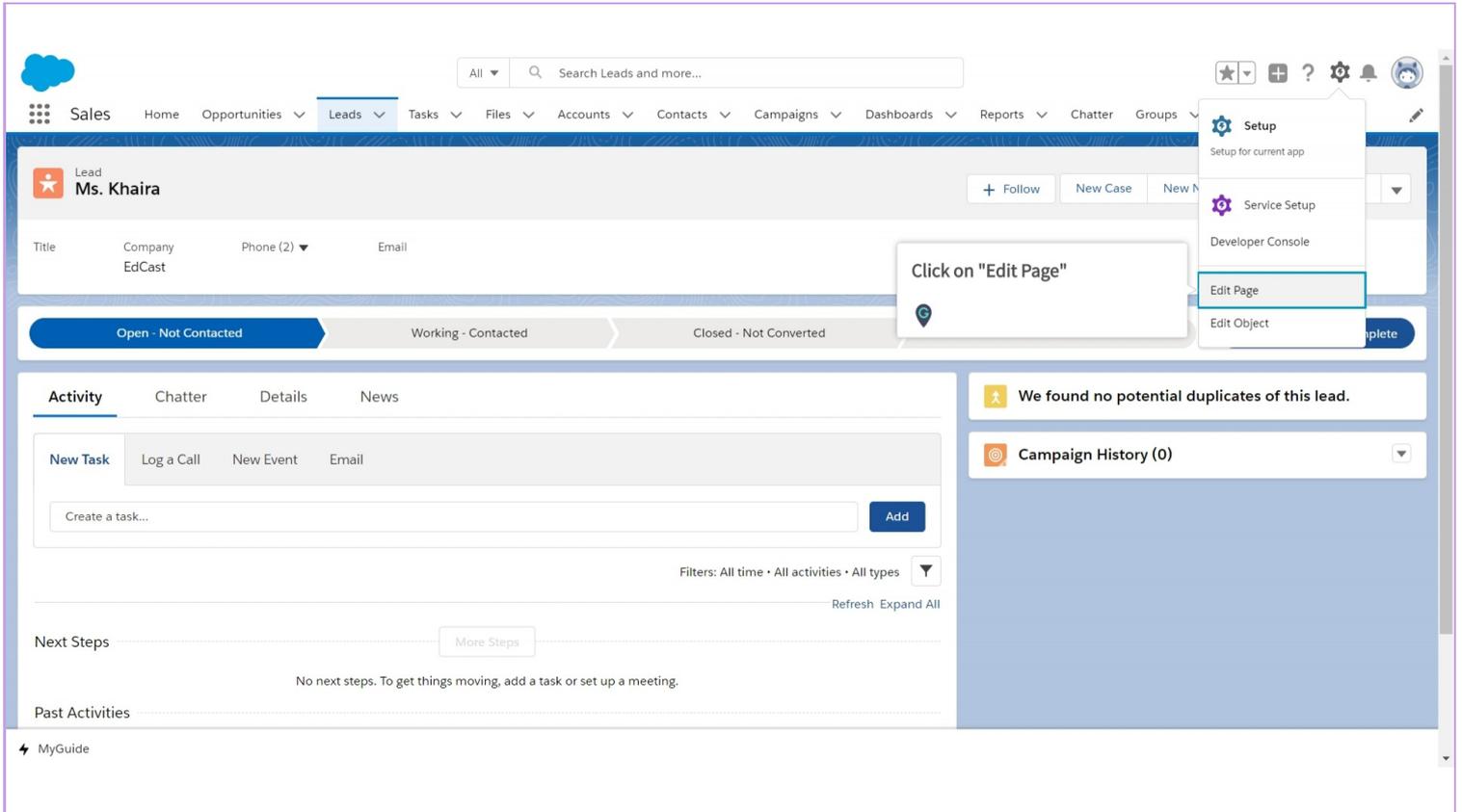
Step: 04

Click on gear cog icon

The screenshot shows a CRM interface for a lead named 'Ms. Khaira'. 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 next to the 'Leads' tab. A callout box with the text 'Click on gear cog icon' points to a gear icon in the top right corner. Below the navigation bar, the lead's name 'Ms. Khaira' is displayed, along with a 'Lead' icon and a star icon. To the right of the name are buttons for '+ Follow', 'New Case', 'New Note', and 'Submit for Approval'. Below this is a table with columns for Title, Company, Phone (2), and Email. The 'Company' column contains the text 'EdCast'. Below the table is a progress bar with four stages: 'Open - Not Contacted' (highlighted in blue), 'Working - Contacted', 'Closed - Not Converted', and 'Converted'. To the right of the progress bar is a button labeled 'Mark Status as Complete'. Below the progress bar are tabs for 'Activity', 'Chatter', 'Details', and 'News'. The 'Activity' tab is active and shows a 'New Task' section with a 'Create a task...' input field and an 'Add' button. Below this is a filter section with the text 'Filters: All time • All activities • All types' and a dropdown arrow. To the right of the 'Activity' section are two panels: one with a yellow icon and the text 'We found no potential duplicates of this lead.', and another with a target icon and the text 'Campaign History (0)'. At the bottom left, there is a 'Next Steps' section with a 'More Steps' button and a message: 'No next steps. To get things moving, add a task or set up a meeting.' Below this is a 'Past Activities' section. At the bottom left of the interface is a 'MyGuide' logo.

Step: 05

Click on "Edit Page"



Step: 06

Go to "Custom - Managed"

The screenshot displays the Salesforce Lightning App Builder interface for configuring a 'Lead Record Page'. The main workspace shows a preview of the lead record page for 'Ms. Khaira', including fields for Title, Company, Phone, and Email, and a progress bar with stages: Open - Not Contacted, Working - Contacted, Closed - Not Converted, and Converted. A callout box with the text 'Go to "Custom - Managed"' points to the 'Custom - Managed (3)' category in the 'Lightning Components' sidebar. The sidebar lists various components like Report Charts, Rich Text, Tabs, Topics, Trending Topics, Twitter, Visualforce, and Wave Dashboard. The right sidebar shows configuration options for the page, including 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 Lightning App Builder interface for configuring a 'Lead Record Page'. On the left, the 'Lightning Components' panel is visible, showing a search bar and a list of components. Under the 'Custom - Managed (3)' section, the 'MyGuide' component is highlighted with a red box. A callout box with a red border and a location pin icon points to this 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 sections like 'Activity', 'Next Steps', and 'Campaign History'. 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 Salesforce Lightning App Builder interface for configuring a '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'. The interface is divided into three main sections:

- Left Sidebar (Lightning Components):** 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. A 'Get more on the AppExchange' button is at the bottom.
- Central Preview:** A preview of the 'Lead Record Page' for 'Ms. Khaira'. It shows a header with contact information, a status bar with 'Open - Not Contacted', and a main content area with tabs for 'Activity', 'Chatter', 'Details', and 'News'. The 'Activity' tab is active, showing a 'New Task' section, 'Next Steps' (with a 'More Steps' button), and 'Past Activities' (with a 'Load More Past Activities' button). A message states: 'No next steps. To get things moving, add a task or set up a meeting.' and 'No past activity. Past meetings and tasks marked as done show up here.'
- Right Configuration Panel:** A list of configuration options for the page:
 - Label:** Lead Record Page
 - Developer Name:** Lead_Record_Page
 - Page Type:** Record Page
 - Object:** Lead
 - Template:** Header, Subheader, Right Sidebar
 - Description:** (Empty text field)

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, containing 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.

Don't show me this message again

Not Yet **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 interface includes a top navigation bar with 'Lightning App Builder', 'Pages', and 'Opportunity Record Page'. The left sidebar shows 'Lightning Components' with a search bar and a list of components like 'Report Chart', 'Rich Text', 'Tabs', etc. The main area displays a preview of the 'MyGuide' opportunity record page, showing fields like 'Account Name', 'Close Date', 'Amount', and 'Opportunity Owner'. The right sidebar shows 'Page > MyGuide' settings, including 'Source', 'Window Height', and 'Set Component Visibility'.

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 for a 'Lead Record Page'. A modal dialog titled 'Activation: Lead Record Page' is open, providing instructions on how to assign custom record pages. The dialog is divided into three sections: 'ORG DEFAULT', 'APP DEFAULT', and 'APP, RECORD TYPE, AND PROFILE'. The 'ORG DEFAULT' section is currently selected and 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.

A link is provided: [Learn more about Lightning page assignment.](#)

Below the sections, there is a note: '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.'

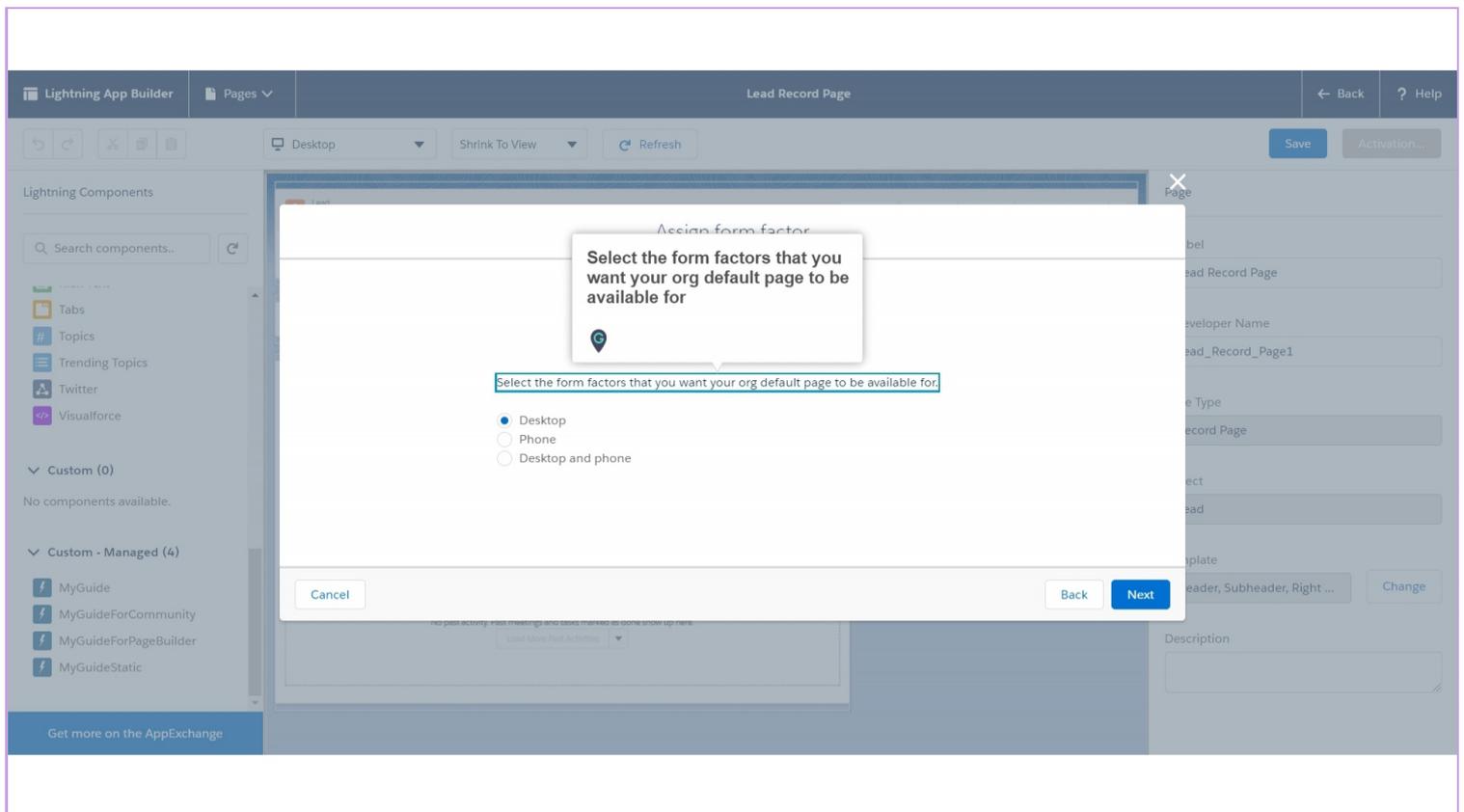
An information icon is followed by the text: 'In standard Salesforce console apps, some objects have a system app default record page. For those objects, if you assign a custom org default page, it doesn't display to users. To enable a custom org default page to show up in the console for those objects,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

A callout box points to the 'Assign as Org Default' button with the text: 'Click on "Assign as Org Default" To set this page as the org default to display it for all Lead records'.

The dialog also features a 'Close' button at the bottom right.

Step: 11

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



The screenshot displays the Lightning App Builder interface for a 'Lead Record Page'. A modal dialog box titled 'Assign form factor' is centered on the screen. The dialog contains the following text and options:

Assign form factor

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

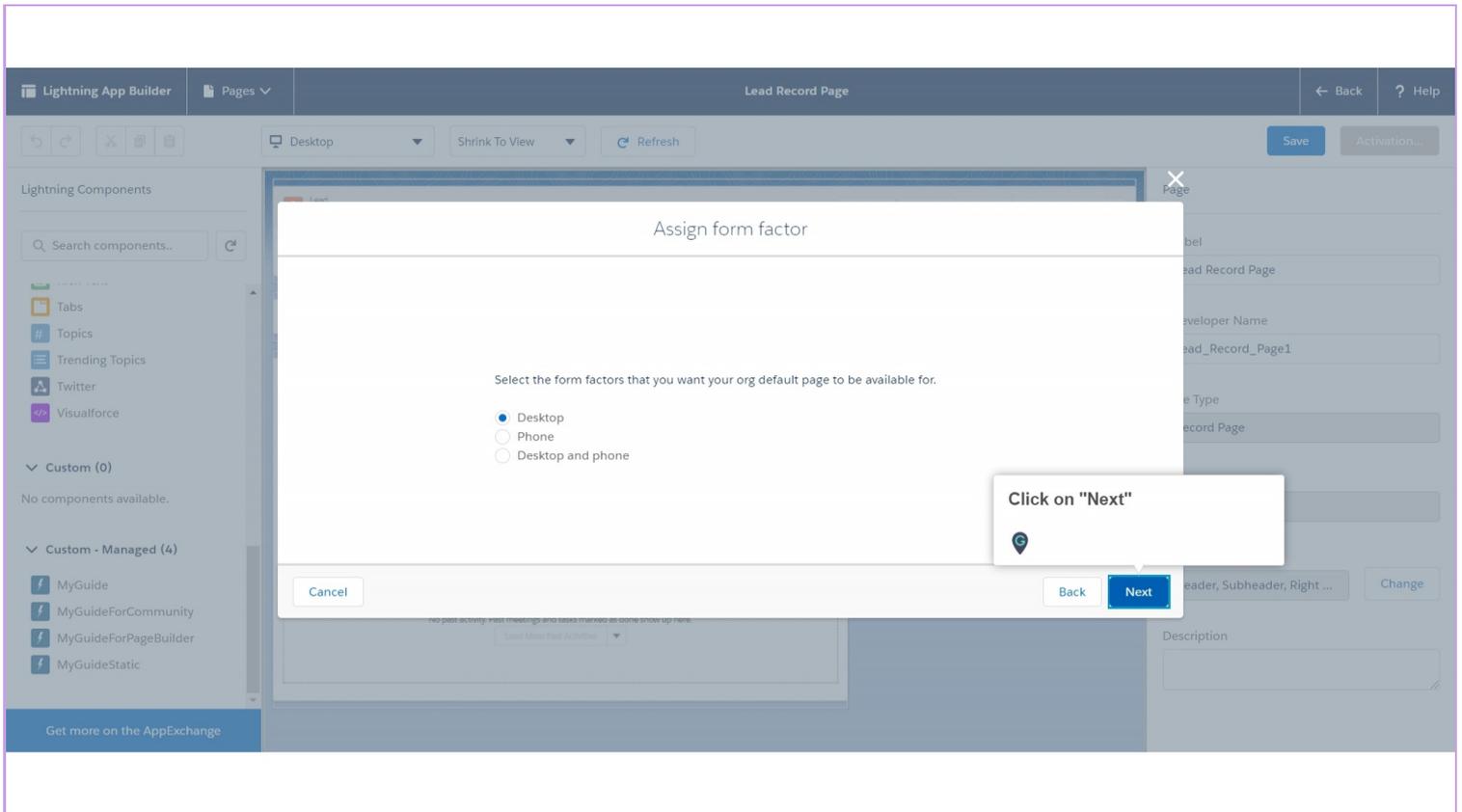
Select the form factors that you want your org default page to be available for.

- Desktop
- Phone
- Desktop and phone

The dialog also features 'Cancel', 'Back', and 'Next' buttons at the bottom.

Step: 12

Click on "Next"



The screenshot displays the Lightning App Builder interface for a 'Lead Record Page'. A modal dialog box titled 'Assign form factor' is open, prompting the user to 'Select the form factors that you want your org default page to be available for.' The dialog includes three radio button options: 'Desktop' (selected), 'Phone', and 'Desktop and phone'. At the bottom of the dialog are 'Cancel', 'Back', and 'Next' buttons. A callout box with a location pin icon points to the 'Next' button, containing the text 'Click on "Next"'. The background shows the Lightning Components sidebar on the left and the page configuration area on the right.

Step: 13

Click on "save"

The screenshot shows the Lightning App Builder interface for a 'Lead Record Page'. A dialog box 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 of 'Review Assignments (1)' with the following data:

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 panel on the left and the page layout on the right.

Step: 14

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

The screenshot shows a Salesforce 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, Reports, Chatter, Groups, Calendar, and More. The search bar contains "Search Salesforce". The lead record is for "Ms. Khaira" with a company of "EdCast". The status is "Open - Not Contacted". A callout box with a location pin icon contains the text: "Now go back to any 'Lead' page of that App to see MyGuide custom page". The interface includes sections for Activity, Chatter, Details, and News. The Activity section has a "New Task" button and options for "Log a Call", "New Event", and "Email". The "Next Steps" section shows "No next steps. To get things moving, add a task or set up a meeting." The "Past Activities" section is empty. On the right side, there is a "Search Guides" section with a search bar and a "Search" button. Below it, the "Current Page" section shows "Current App" and "No Guides on this page!". At the bottom, there is a "Campaign History (0)" section.

Thank You!

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