

Configure MyGuide Button for Opportunity Page

myguide.org

#### Welcome to MyGuide

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

| <b>*</b>   | All 💌 🔍 Search Salesforce   | 🔯 🛡 🖶 ? 🏟 单 🐻 Î   |
|--|---|---|
| Sales Home Opportunities V Leads V Tasks V                       | <ul> <li>Files          <ul> <li>Accounts</li> <li>Contacts</li> <li>Campaigns</li> <li>Dashboards</li> </ul> </li> </ul> | r Reports ∨ Chatter Groups ∨ Calendar ∨ More▼ 💉           |
| Quarterly Performance<br>CLOSED \$105,000 OPEN (>70%) \$0 GOAL 🖋 | As of Jan 10, 2019 12:28:16 AM 🦉  | Assistant   |
| 120x   |   | + Contin  |
| 90k  | Welcome to MyGuide  | Nothing needs your attention right now. Check back later. |
| 30x  | In this Guide, we will learn how to<br>configure MyGuide on Opportunity Page  |   |
|  |   |   |
| Jan Feb<br>Closed Good   | Mar<br>al Closed + Open (>70%)  |   |
| Today's Events   | Today's Tasks ▼   |   |
|  |   |   |
| ✤ MyGuide  |   |   |
|  |   |   |



# Click on "Settings" icon

| All •       Q       Search Salesforce         III •       Q       Search Salesforce         III •       Q       Search Salesforce   | Click on "Settings" icon                                  |
|---|---|
| Quarterly Performance         As of Jan 10, 2019 12:28:16 AM         C           CLOSED \$105,000         OPEN (>70%)         \$0         GOAL ~         C           120x | Assistant   |
| 90x   | Nothing needs your attention right now. Check back later. |
| 0   |   |
| MyGuide   | ·   |



# Click on "Setup"

It will open in a new tab

| Sales Home Opportunities V Leads V                                       | All ▼     Q. Search Salesforce       Tasks ∨     Files ∨     Accounts ∨     Contacts ∨     Campaigns ∨ | Dashi<br>Click on "Setup" | ☆ Setup  |
|--|--|---------------------------|--|
| Quarterly Performance<br>CLOSED \$105,000 OPEN (>70%) \$0 GOAL *<br>120k | As of Jan 10, 2019 12  | Nothing needs yo          | Setup for current app<br>Setup for current app<br>Developer Console<br>Edit Page<br>Dur attention right now. Check back later. |
| Jan Feb<br>Closed<br>Today's Events<br>4 MyGuide                         | Mar<br>Goal Closed + Open (>70%)<br>Today's Tasks  | T T                       | -  |



#### Click on "Object Manager"





# Enter "Opportunity" in quick find box

| •   |                     | Q. Search Setup                  |  |                   | 🔄 🖪 ? 🌣 🌲 🐻             |
|---|---------------------|----------------------------------|--|-------------------|-------------------------|
| SETUP<br>SETUP<br>Object Manager<br>33 Items, Sorted by Label | Aanager 🗸           | NENNE JIMUL – JUNS-JUC – LULESNE | Enter "Opportunity" in quick find<br>box | Q Quick Find      | Schema Builder Create 💌 |
| 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  |                                  |  |                   | *                       |
|   |                     |                                  |  |                   |                         |



# Click on "Opportunity"

| Setup Home Object Manager V                              | Q Search Setup |               | <u>≽</u> ∎?‡‡           |
|--|----------------|---------------|-------------------------|
| SETUP<br>Object Manager<br>2 Items, Sorted by Label      |                | Q opportunity | Schema Builder Create 🔻 |
| Copportunity Copportunity Product Click on "Opportunity" | ION            | LAST MODIFIED | DEPLOYED CUSTOM         |
|  |                |               |                         |



# Click on "Page Layouts"

| Setup Home Obj                        | Q Sear                  | ch Setup |                                     | x 🖬 ? 🌣 🖡 🐻 |
|---------------------------------------|-------------------------|----------|-------------------------------------|-------------|
| SETUP > OBJECT MANAGER<br>Opportunity |                         |          |                                     |             |
| Details                               | Details                 |          |                                     |             |
| Fields & Relationships                | Click on "Page Layouts" |          |                                     |             |
| Page Layouts                          |                         |          |                                     |             |
| Lightning Record Pages                |                         |          | Enable Reports                      |             |
| Buttons, Links, and Actions           | Opportunity             |          | Track Activities                    |             |
| Compact Layouts                       | custom                  |          | Track Activities                    |             |
| Field Sets                            | Singular Label          |          | Track Field History                 |             |
| Object Limits                         | Opportunity             |          |                                     |             |
| Record Types                          | Opportunities           |          | Deployment Status                   |             |
| Related Lookup Filters                |                         |          | Help Settings                       |             |
| Search Layouts                        |                         |          | Standard salesforce.com Help Window |             |
| Triggers                              |                         |          |                                     |             |
| Validation Rules                      |                         |          |                                     |             |
|                                       |                         |          |                                     |             |
|                                       |                         |          |                                     |             |
|                                       |                         |          |                                     |             |



# Click on "Opportunity Layout"

| Setup Home Ob   | ject Manager 🗸                 | Q Search Setup                      |                                     | k 🗄 ? 🌣 🖡 🐻                |
|---|--------------------------------|-------------------------------------|-------------------------------------|----------------------------|
| SETUP > OBJECT MANAGE                                 |                                |                                     |                                     |                            |
| Details   | Page Layouts                   |                                     | Q Quick Find                        | New Page Layout Assignment |
| Fields & Relationships                                | PAGE LAYOUT NAME               | CREATED BY                          | MODIFIED BY                         |                            |
| Page Layouts  | Opportunity (Marketing) Layout | Natasha Saxena, 6/21/2018, 12:15 AM | Natasha Saxena, 6/21/2018, 12:15 AM | •                          |
| Lightning Record Pages<br>Buttons, Links, and Actions | Opportunity (Sales) Layout     | Natasha Saxena, 6/21/2018, 12:15 AM | Natasha Saxena, 6/21/2018, 12:15 AM |                            |
| Compact Layouts                                       | Opportunity (Support) Layout   | Natacha Cavana 6/01/0010 10:15 AM   | Natasha Saxena, 6/21/2018, 12:15 AM | •                          |
| Field Sets<br>Object Limits                           | Opportunity Layout             | Click on "Opportunity Layout"       | Natasha Saxena, 10/3/2018, 5:20 AM  | •                          |
| Record Types  |                                |                                     |                                     |                            |
| Related Lookup Filters                                |                                |                                     |                                     |                            |
| Search Layouts  |                                |                                     |                                     |                            |
| Triggers  |                                |                                     |                                     |                            |
| Validation Rules                                      |                                |                                     |                                     |                            |
|   |                                |                                     |                                     |                            |





#### Q Search Setup 🔯 🖬 ? 🏟 🐥 🐻 Home Object Manager 🗸 Setup SETUP > OBJECT MANAGER Opportunity nts Mini Page Layout Mini Console View | Video Tutorial Help for this Page 🧑 Opportunity Layout Details Save V Quick Save Preview As... V Cancel VIndo Redo E Layout Properties Fields & Relationships Time Spents (in m... Buttons Int Generator(s) Forecast Category Main Competitor(s) Order Numbe Next Step Partner Accor Private Partner Account Probability (%) Price Book Quantity Page Layouts Last Modified By Lead Source Custom Links Click on "Mobile & Lightning ery/installa... Tracking Number Quick Actions Mobile & Lightning Actions Opportunity Name Quantity ption Туре Actions" Lightning Record Pages ary Campa Main Com cted Rever tor(s) Opportunity Owner Buttons, Links, and Actions G Compact Layouts Field Sets Highlights Panel Object Limits Customize the highlights panel for this page layou Record Types Quick Actions in the Salesforce Classic Publisher $\fbox{1}$ Related Lookup Filters Post File New Task Log a Call New Case New Note New Event Link Poll Question Email Search Layouts Salesforce Mobile and Lightning Experience Actions Triggers 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 Validation Rules

Step: 09

#### Click on "Mobile & Lightning Actions"



#### You will see the "MyGuide" button in the right palette

| <b>•</b>                              |  |                         | C                  | Search Setup                 |                            |   |                     |                         |                      |               |                    | 🔄 🗄 ? 🌣 🖡 🕻        |
|---------------------------------------|--|-------------------------|--------------------|------------------------------|----------------------------|---|---------------------|-------------------------|----------------------|---------------|--------------------|--------------------|
| Setup Home Object M                   | Manager 🗸                                  |                         |                    |                              |                            |   |                     |                         |                      |               |                    |                    |
| SETUP > OBJECT MANAGER<br>Opportunity | Save V Quick                               | Save Previo             | ew As * Cancel     |                              | do 🛛 🖃 Lavout Prop         | erties  |                     |                         |                      |               |                    |                    |
| Details                               | Buttons                                    |                         | Q Quick Find       | Mobile Action Nam            | e x                        |   |                     |                         |                      |               |                    |                    |
| Fields & Relationships                | Custom Links<br>Quick Actions              | - 1                     | Change Owner       | Edit                         | Log a C                    | all N   | You will see        | the "MvGi               | uide"                |               | Submit for Approve | d                  |
| Page Layouts                          | Mobile & Light<br>Actions<br>Expanded Look | ning<br>ups             | Change Recon       | 1 Type Email<br>File<br>Link | Mobile<br>MyGuid<br>New Ac | Smart Actions N<br>e                              | button in th        | e right pa              | lette                |               |                    |                    |
| Lightning Record Pages                | Related Lists<br>Report Charts             | -                       |                    |                              |                            | Label: MyGuide<br>Name: Opportu<br>Action Type: Q | Ŷ                   |                         |                      |               |                    |                    |
| Buttons, Links, and Actions           |  |                         |                    |                              |                            | Create Feed Ite                                   | n: No               |                         |                      |               |                    |                    |
| Compact Layouts                       | Quick Acti                                 | ons in the              | Salesforce Clas    | sic Publisher 🔃              |                            |   |                     |                         |                      |               |                    |                    |
| Field Sets                            | Post                                       | File                    | New Task           | Log a Call                   | New Case                   | New Note  | New Event           | Link                    | Poll                 | Question      | Email              |                    |
| Object Limits                         | Salesforce                                 | Mobile an               | d Lightning Exp    | perience Actions             | i                          |   |                     |                         |                      |               |                    |                    |
| Record Types                          | Post                                       | File                    | New Task           | Log a Call                   | New Case                   | New Note  | New Event           | Link                    | Poll                 | Question      | Email              | Change Record Type |
| Related Lookup Filters                | Clone                                      | Submit fo               | or Approval        | Delete                       | Edit Change                | Owner S   | haring              |                         |                      |               |                    |                    |
| Search Layouts                        | Opportunit                                 | ty Detail               |                    |                              | Edit Delete                | Clone Change Ow                                   | her Change Record T | ype Sharing             | Custom Bu<br>MyGuide | MyGuide InApp |                    |                    |
| Triggers                              | Opportunity                                | Information             | (Header visible on | edit only)                   |                            |   |                     |                         |                      |               |                    |                    |
| Validation Rules                      | Oppor                                      | tunity Owner<br>Private | Sample Text        | ,,                           |                            |   | 🔒 Exp               | Amount<br>ected Revenue | \$123.45<br>\$123.45 |               |                    |                    |
|                                       | • •  |                         | · · · ·            |                              |                            |   |                     | •                       |                      |               |                    |                    |





Drag the "MyGuide" action from the right palette to the "Salesforce Mobile & Lightning Experience Actions" section of the page

| SETUP > OBJECT MANAGER<br>Opportunity<br>Details<br>Fields & Relationships<br>Page Layouts | ve V Quick Save Previe<br>Ids<br>stom Links<br>stom Links                        | W As V Cancel                  | Undo Re<br>Field Name              | edo 👔 Layout Pr | operties         |                   |                       |                         |                   |                 |
|--|--|--------------------------------|------------------------------------|-----------------|------------------|-------------------|-----------------------|-------------------------|-------------------|-----------------|
| Details Fields & Relationships Fields & Relationships Page Layouts Mob Action              | Ids tons stom Links ick Actions  | Quick Find F                   | Field Name                         | 8               |                  |                   |                       |                         |                   |                 |
| Fields & Relationships Butt<br>Cust<br>Page Layouts Mob<br>Action                          | ttons<br>stom Links<br>ick Actions   | + Section                      | Attainmer                          |                 |                  |                   |                       |                         |                   |                 |
| Page Layouts Mob   | stom Links<br>ick Actions  | + Plank Space                  |                                    | t Amount Curre  | ent Generator(s) | Forecast Category | Main Competitor(s)    | Order Number            | Probability (%)   | Tracking Number |
| Page Layouts Mob<br>Actio  | ICK Actions  | plank space                    | ¢                                  |                 |                  |                   | Next Step             | Price Book              | Quantity          | Туре            |
| Actic  | bile & Lightning   | Account Name                   | 4 Dra                              | ig the "MyGu    | ide" action      | from the          | Opportunity Name      | Primary Campaign        | Stage             |                 |
| Links in a Descend Descent   | ions   | Amount                         | í rig                              | nt nalette to   | the "Salesfo     | rce Mohile        | Opportunity Owner     | Private                 | Time Spents (in m |                 |
| Lightning Record Pages Expa  | panded Lookups   |                                | light particle Evanciance Actions" |                 |                  |                   |                       |                         |                   |                 |
| Rela   | lated I lists  | a Light mig experience Actions |                                    |                 |                  |                   |                       |                         |                   |                 |
| Buttons, Links, and Actions  | Customize the highingins panerior this page tayour. Section of the page          |                                |                                    |                 |                  |                   |                       |                         |                   |                 |
| Compact Layouts Q  | Quick Actions in the Salesforce Classic Publi                                    |                                |                                    |                 |                  |                   |                       |                         |                   |                 |
| Field Sets   | Post File  | New Task                       | Log a Gan                          | New Case        | New Note         | New Event         | Link F                | Poll Question           | Email             |                 |
| Object Limits S  | Salesforce Mobile and  | 1 Lightning Expe               | erience Actions                    | 5 <b>i</b>      |                  |                   |                       |                         |                   |                 |
| Record Types   | Post Eile  | New Task                       | MyGuida                            |                 | New Case         | New Note          | New Event             | Link Poll               | Question          | Email           |
|  | Change Decent Tree   | New Task                       | Ny Guide                           | Log a Call      | New Case         | New Note          | New Event             | LIIK FOI                | Question          | Entan           |
| Related Lookup Filters   | change Record Type   | Cione                          | submit for App                     | rovai Dele      | te Edit          | Change Owne       | r sharing             |                         |                   |                 |
| County I wante   |  |                                |                                    | 0               |                  |                   | -                     |                         |                   |                 |
| Search Layouts O   | Opportunity Detail Standard Buttons Custom Buttons Custom Buttons Custom Buttons |                                |                                    |                 |                  |                   |                       |                         |                   |                 |
| Triggers   |  |                                |                                    | Lun Delete      | change (         | Change Record     | ., yes surring        | , saids in yourde micht |                   |                 |
|  | Opportunity Information  | (Haadar vieibla on ad          | dit only)                          |                 |                  |                   |                       |                         |                   |                 |
| Validation Rules   | Opportunity Owner  | Sample Text                    | ant only)                          |                 |                  |                   | Amount \$123          | 3.45                    |                   |                 |
| •  | Private  | 1                              |                                    |                 |                  | 🔒 Ex              | spected Revenue \$123 | 3.45                    |                   | -               |
|  |  | (MR)4                          |                                    |                 |                  |                   |                       |                         |                   |                 |



#### Click on "Save"





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

| All 👻 Q Search Opportunities and more   | * 🖬 ? 🌣 🜲 👼 🕯   |
|---|---|
| Sales Home Opportunities Leads V Tasks V Files V Accounts V Contacts V Campaigns V Dashboards V | ✓ Reports ✓ Chatter Groups ✓ Calendar ✓ More▼ 💉                   |
| Popportunity<br>test  | + Follow MyGuide New Case New Note V                              |
| Account Name Close Date Amount Opportunity Owner<br>1/10/2019 🔂 Deeksha Khaira 🖍                | Now open any "Opportunity" and<br>you will see the MyGuide Button |
| Qualification Needs Analysis Value Proposition Id. Decision Mak Perception Anal Proposal/Price  | Negotia Closed of Mark Stage as Complete                          |
| Activity Chatter Details  | Search Guides Search  |
| New Task Log a Call New Event Email   | Current Page Current App  |
| Create a task Add   | No Guides on this page!   |
| Filters: All time • All activities • All types  | Products (0)  |
| Refresh Expand All  | 🚺 Notes & Attachments (0)   |
| No next steps. To get things moving, add a task or set up a meeting.                            | 1 Upload Files  |
| 4 MyGuide   |   |
|   |   |



# **Thank You!**

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