

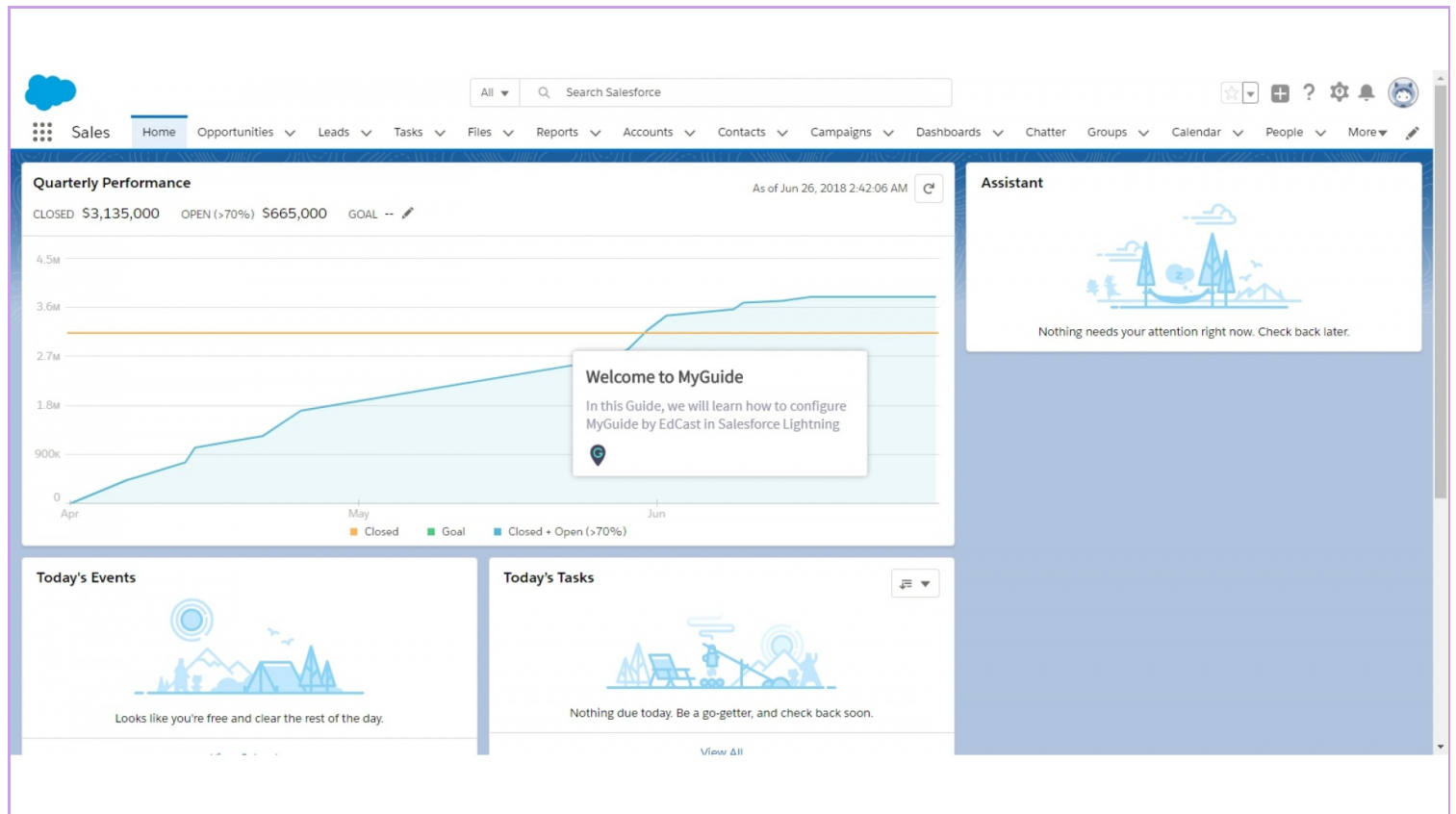


Configure MyGuide by EdCast

Step: 01

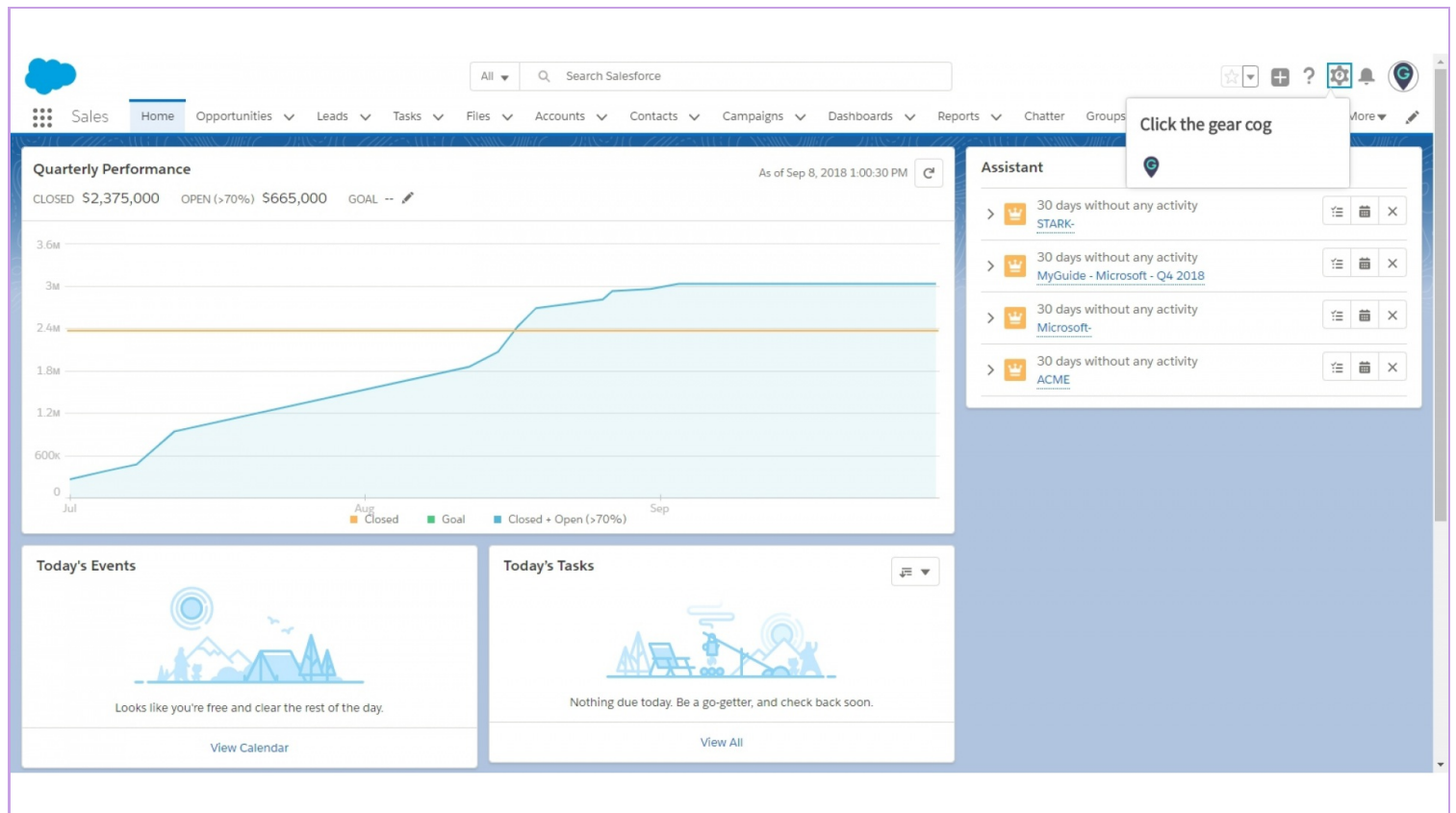
Welcome to MyGuide

In this Guide, we will learn how to configure MyGuide by EdCast in Salesforce Lightning



Step: 02

Click the gear cog



Step: 03

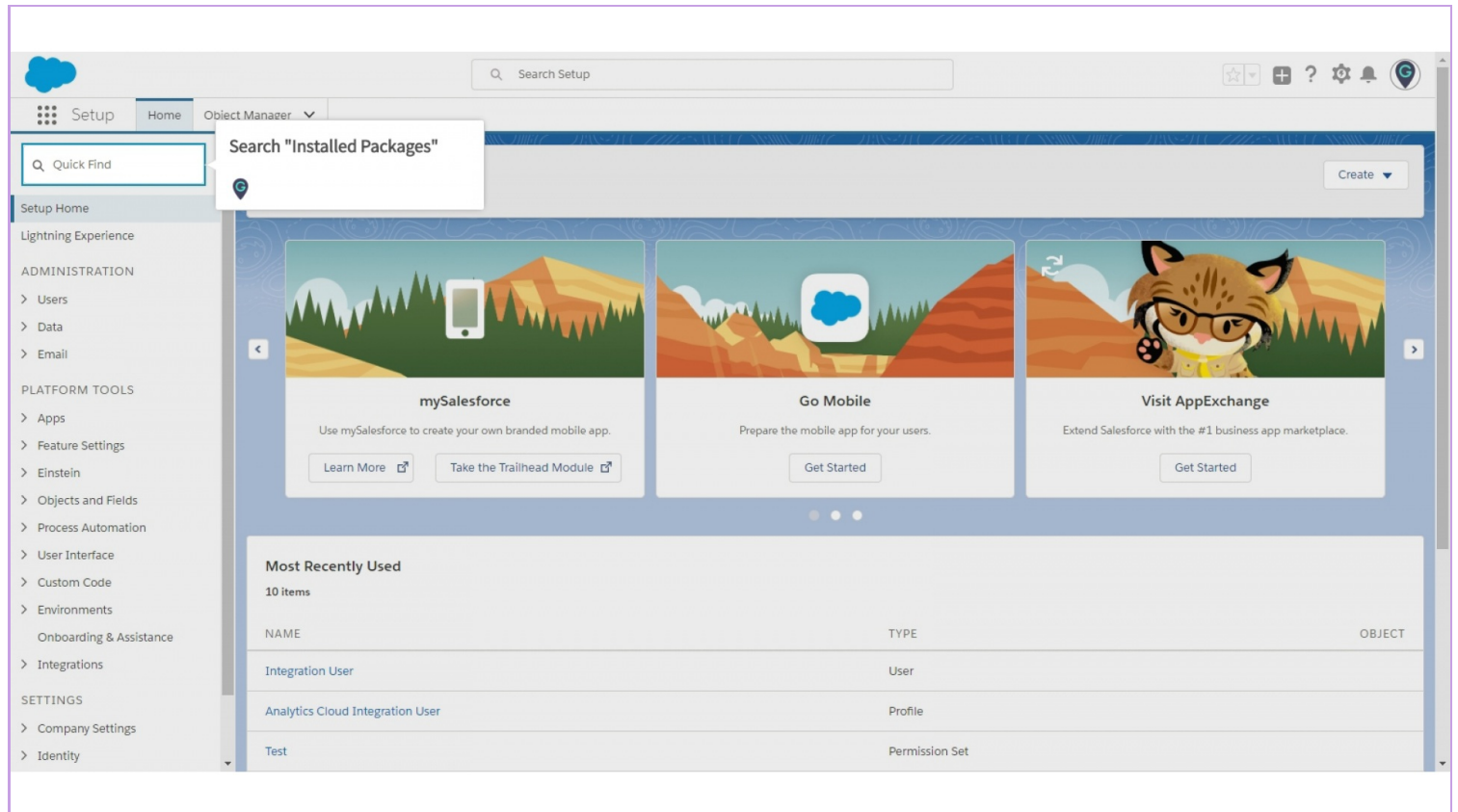
Click on "Setup"

It will open in a new tab

The screenshot displays the Salesforce user interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below this is a main navigation menu with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and Reports. The main content area features a 'Quarterly Performance' chart showing sales trends from July to September 2018. Below the chart are two sections: 'Today's Events' and 'Today's Tasks'. On the right side, a 'Setup' button is highlighted with a tooltip that says 'Click on "Setup" It will open in a new tab'. The 'Setup' button is part of a dropdown menu that also includes 'Service Setup', 'Developer Console', and 'Edit Page'.

Step: 04

Search "Installed Packages"

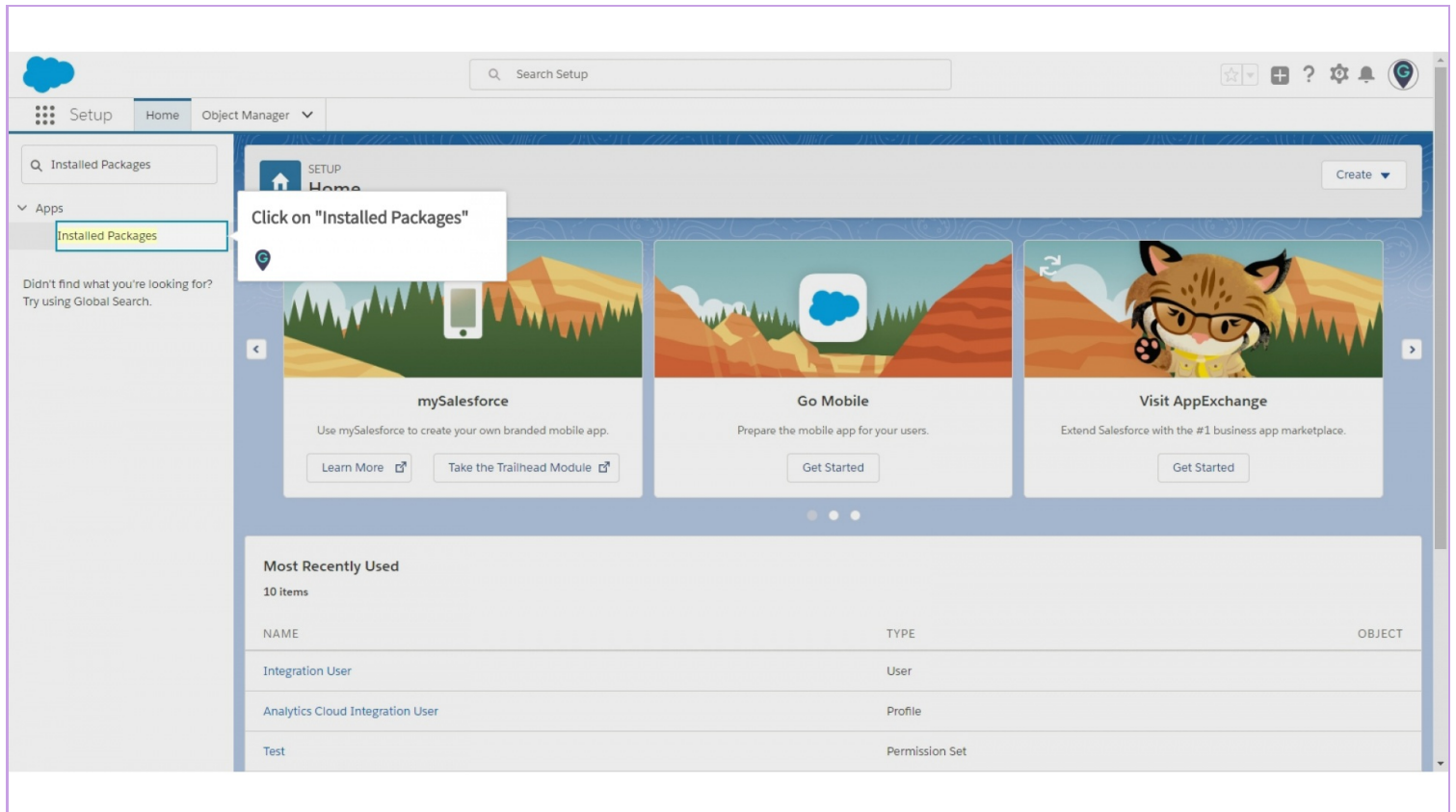


The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below it, a "Quick Find" search bar is visible. A callout box points to the "Quick Find" search bar with the text "Search 'Installed Packages'". The left sidebar contains a navigation menu with categories like "Setup Home", "ADMINISTRATION", "PLATFORM TOOLS", and "SETTINGS". The main content area displays three cards: "mySalesforce", "Go Mobile", and "Visit AppExchange". Below these cards is a section titled "Most Recently Used" with a table listing recent items.

NAME	TYPE	OBJECT
Integration User	User	
Analytics Cloud Integration User	Profile	
Test	Permission Set	

Step: 05

Click on "Installed Packages"



The screenshot shows the Salesforce Setup interface. In the left sidebar, under the 'Apps' section, the 'Installed Packages' link is highlighted with a yellow box. A white callout box with a blue location pin icon points to this link, containing the text 'Click on "Installed Packages"'. The main content area displays three featured cards: 'mySalesforce', 'Go Mobile', and 'Visit AppExchange'. Below these cards is a section titled 'Most Recently Used' with a table of 10 items.

NAME	TYPE	OBJECT
Integration User	User	
Analytics Cloud Integration User	Profile	
Test	Permission Set	

Step: 06

Click on "Configure"

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, and Object Manager. The main content area is titled 'Installed Packages' and includes a search bar. Below the title, there is a table of installed packages. A callout box with the text 'Click on "Configure"' points to the 'Configure' link in the 'Action' column for the 'EdCast for Salesforce' package.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
Uninstall Configure	EdCast for Salesforce	EdCast	2.12	edcast	9/20/2018 1:57 AM	<input type="checkbox"/>	1	2	2	Passed

Step: 07

EdCast Configuration

To create Remote site settings, copy the URL (<https://.salesforce.com>), here the tenant is na57

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the "Setup" tab is selected, and the "EdCast" section is highlighted in the left sidebar. The main content area displays the "EdCast Configuration" instructions. A tooltip is visible over the "EdCast Configuration" heading, providing additional context: "To create Remote site settings, copy the URL (<https://<tenant>.salesforce.com>), here the tenant is na57". The main instructions state: "Create [Remote site setting](#) for this URL <https://na57.salesforce.com> then click on below button." Below this, it says "Create Edcast Tours button on objects." and a "Configure EdCast" button is visible.

EdCast Configuration

To create Remote site settings, copy the URL (<https://<tenant>.salesforce.com>), here the tenant is na57

Create [Remote site setting](#) for this URL <https://na57.salesforce.com> then click on below button.

Create Edcast Tours button on objects.

[Configure EdCast](#)

Step: 08

In a new tab, visit the home page of Salesforce and click the gear cog icon

The screenshot shows the Salesforce home page 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, Reports, Accounts, Contacts, Campaigns, Dashboards, and Chatter. Below the navigation bar, the main content area is divided into several sections. On the left, there is a 'Quarterly Performance' section with a line chart showing sales performance from April to June. The chart includes a blue line for 'Closed + Open (>70%)', an orange line for 'Closed', and a green line for 'Goal'. The y-axis ranges from 0 to 4.5M. Below the chart, there are two sections: 'Today's Events' and 'Today's Tasks'. The 'Today's Events' section shows a calendar icon and the text 'Looks like you're free and clear the rest of the day.' The 'Today's Tasks' section shows a task icon and the text 'Nothing due today. Be a go-getter, and check back soon.' On the right side of the page, there is an 'Assistant' section with a speech bubble icon and the text 'Nothing needs your attention right now. Check back later.' A tooltip is visible over the gear icon in the top right corner, containing the text: 'In a new tab, visit the home page of Salesforce and click the gear cog icon'.

Step: 09

Click on "Setup"

It will open in a new tab

The screenshot displays the Salesforce user interface. At the top, the navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu is visible, with 'Sales' selected. The 'Setup' button is highlighted in the top right corner, with a tooltip indicating it will open in a new tab. The dashboard content includes a 'Quarterly Performance' chart showing sales data from April to June, 'Today's Events' section with a message about being free, and 'Today's Tasks' section with a message about no tasks due today.

Quarterly Performance
CLOSED \$3,135,000 OPEN (>70%) \$665,000 GOAL --
As of Jun 26, 2018 2:42:06 AM

Today's Events
Looks like you're free and clear the rest of the day.

Today's Tasks
Nothing due today. Be a go-getter, and check back soon.

Step: 10

Enter "Remote"

The screenshot shows the Salesforce Setup interface. At the top, there is a 'Search Setup' bar. Below it, the 'Setup' tab is active, and a 'Quick Find' search bar is highlighted. A white overlay box with the text 'Enter "Remote"' and a location pin icon is positioned over the 'Quick Find' bar. The left sidebar contains a navigation menu with categories like 'Setup Home', 'ADMINISTRATION', 'PLATFORM TOOLS', and 'Apps'. The main content area features three cards: 'mySalesforce', 'Go Mobile', and 'Visit AppExchange'. Below these cards is a section titled 'Most Recently Used' with a table listing one item.

Setup Home

Lightning Experience

Lightning Usage

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- Apps
 - App Manager
 - AppExchange Marketplace
 - > Connected Apps
 - Installed Packages
 - > Lightning Bolt
 - > Mobile Apps
 - Package Manager
 - > Feature Settings
 - > Einstein
 - > Objects and Fields
 - > Process Automation

Search Setup

Quick Find

Enter "Remote"

Create

mySalesforce

Use mySalesforce to create your own branded mobile app.

Learn More

Take the Trailhead Module

Go Mobile

Prepare the mobile app for your users.

Get Started

Visit AppExchange

Extend Salesforce with the #1 business app marketplace.

Get Started

Most Recently Used

1 items

NAME	TYPE	OBJECT
Deeksha Khaira	User	

Step: 11

Click on "Remote Site Settings"

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with the text "remote" and a list of results under the "Security" category, with "Remote Site Settings" highlighted. The main content area shows the "Home" page with a "Click on 'Remote Site Settings'" callout box. Below the callout are three cards: "mySalesforce", "Go Mobile", and "Visit AppExchange". At the bottom, there is a "Most Recently Used" section with a table listing one item: "Deeksha Khaira" (User).

Search Setup

Setup Home Object Manager

Q remote

Custom Code

Remote Access

Security

Remote Site Settings

Didn't find what you're looking for? Try using Global Search.

SETUP Home

Create

Click on "Remote Site Settings"

mySalesforce

Use mySalesforce to create your own branded mobile app.

Learn More

Take the Trailhead Module

Go Mobile

Prepare the mobile app for your users.

Get Started

Visit AppExchange

Extend Salesforce with the #1 business app marketplace.

Get Started

Most Recently Used

1 items

NAME	TYPE	OBJECT
Deeksha Khaira	User	

Step: 12

Click on "New Remote Site"

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'remote' and a list of categories: Custom Code, Remote Access, Security, and Remote Site Settings (highlighted). The main content area is titled 'Remote Site Settings' and 'All Remote Sites'. Below the title, it states: 'Below is the list of Web addresses that your organization can invoke from salesforce.com. To add another Web address, click New Remote Site.' There is a 'View' dropdown set to 'All Remote Sites' and a 'Create New View' link. A table lists existing remote sites. A callout box with a location pin icon points to the 'New Remote Site' button in the table's header, with the text 'Click on "New Remote Site"'. The table has columns for Action, Remote Site Name, Namespace Prefix, Remote Site URL, Active status, Modified By, and Last Modified Date.

Action	Remote Site Name	Namespace Prefix	Remote Site URL	Active	Modified By	Last Modified Date
Edit Del	ApexDevNet	-	http://www.apexdevnet.com	✓		1/31/2019 11:44 PM
Edit Del	API_Guide_Me_Production	edcast	https://api-v2.guideme.io	✓	Khaira_Deeksha	2/1/2019 12:28 AM
Edit Del	GuideMev3	edcast	https://api-v3.guideme.io	✓	Khaira_Deeksha	2/1/2019 12:28 AM
Edit Del	SFDC_Analytics	edcast	https://v3-analytics.guideme.io	✓	Khaira_Deeksha	2/1/2019 12:28 AM

Step: 13

Enter "Remote Site Name"

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with "remote" entered and a list of navigation items: Custom Code, Remote Access, Security, and Remote Site Settings (highlighted). The main content area is titled "Remote Site Settings" and "Remote Site Edit". Below the title is a text input field for "Remote Site Name" which is currently empty. To the right of this field, a tooltip box appears with the text "Enter 'Remote Site Name'" and a location pin icon. Other fields include "Remote Site URL" (containing "https://test009-dev-ed.my.salesforce.com"), "Disable Protocol Security" (checkbox), "Description" (text area), and "Active" (checkbox, checked). At the top of the main content area, there is a "Search Setup" bar and a row of utility icons (star, plus, question mark, gear, bell, and user profile).

Step: 14

Enter "Remote Site URL"

Here, you have to enter the copied URL: `https://.salesforce.com` from the earlier page

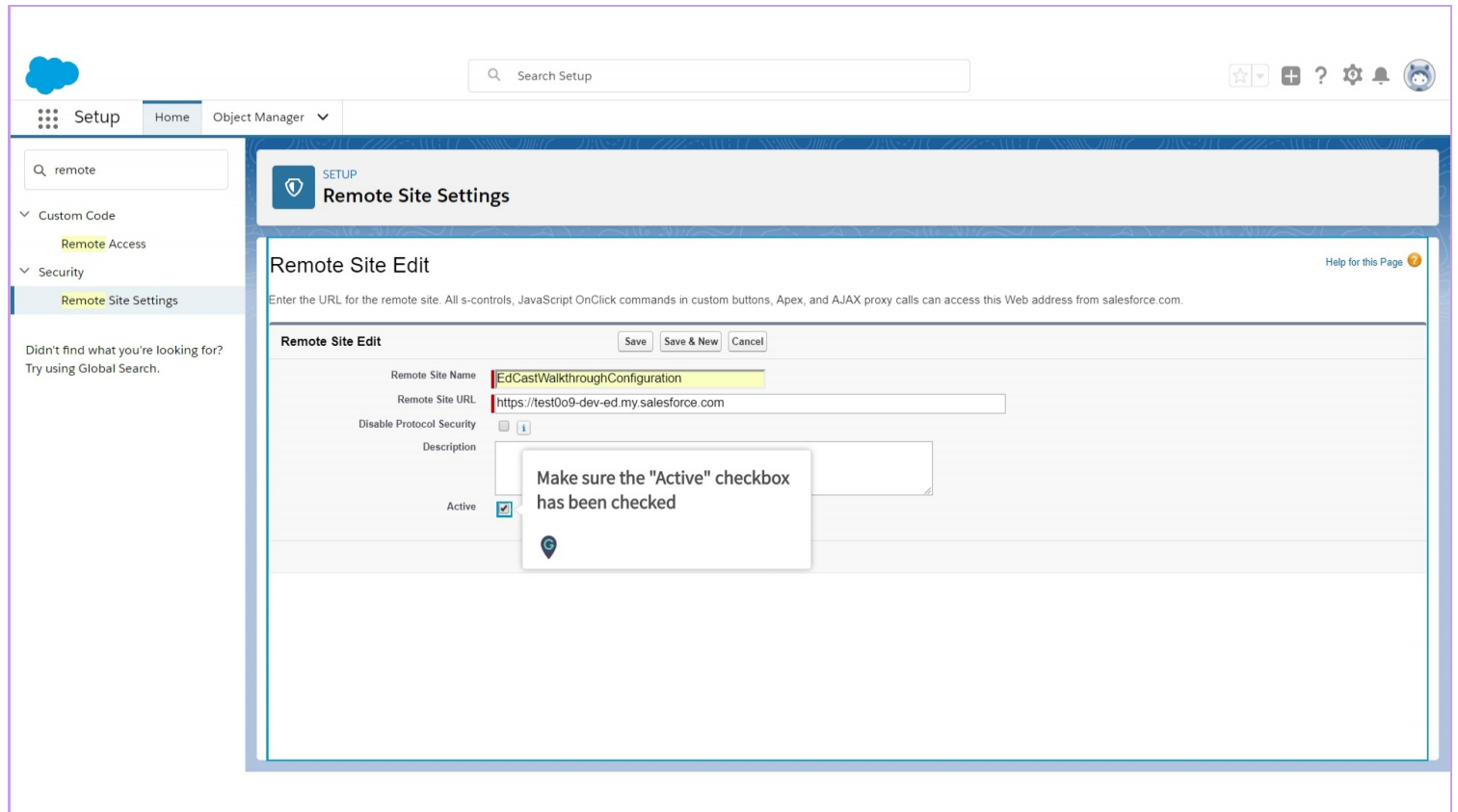
The screenshot shows the Salesforce Setup interface. On the left, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Remote Site Settings' section is highlighted. The main content area is titled 'Remote Site Edit' and contains the following fields:

- Remote Site Name: EdCastWalkthroughConfiguration
- Remote Site URL: https://test009-dev-ed.my.salesforce.com
- Disable Protocol Security: ☐
- Description: (empty text box)
- Active: ☒

Buttons at the top and bottom of the form include 'Save', 'Save & New', and 'Cancel'. A callout box titled 'Enter "Remote Site URL"' is overlaid on the right side of the form, containing the text: 'Here, you have to enter the copied URL: https://.salesforce.com from the earlier page'.

Step: 15

Make sure the "Active" checkbox has been checked



The screenshot displays the Salesforce Setup interface. On the left, the navigation menu includes 'Setup', 'Home', and 'Object Manager'. The 'Setup' menu is expanded, showing 'Custom Code', 'Remote Access', 'Security', and 'Remote Site Settings'. The 'Remote Site Settings' option is selected. The main content area is titled 'Remote Site Edit' and contains the following fields:

- Remote Site Name: EdCastWalkthroughConfiguration
- Remote Site URL: https://test009-dev-ed.my.salesforce.com
- Disable Protocol Security: ☐
- Description: (empty text area)
- Active: ☒

A callout box with the text 'Make sure the "Active" checkbox has been checked' is positioned over the 'Active' checkbox. The top of the page features a search bar labeled 'Search Setup' and a navigation bar with icons for home, help, and user profile.

Step: 16

Click on "Save"

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Remote Site Settings' selected. The main content area is titled 'Remote Site Edit' under the 'Remote Site Settings' section. The form contains the following fields:

- Remote Site Name: EdCastWalkthroughConfiguration
- Remote Site URL: https://test009-dev-ed.my.salesforce.com
- Disable Protocol Security: ☐
- Description: (empty text box)
- Active: ☒

A 'Save' button is highlighted with a red box, and a callout bubble points to it with the text "Click on 'Save'".

Step: 17

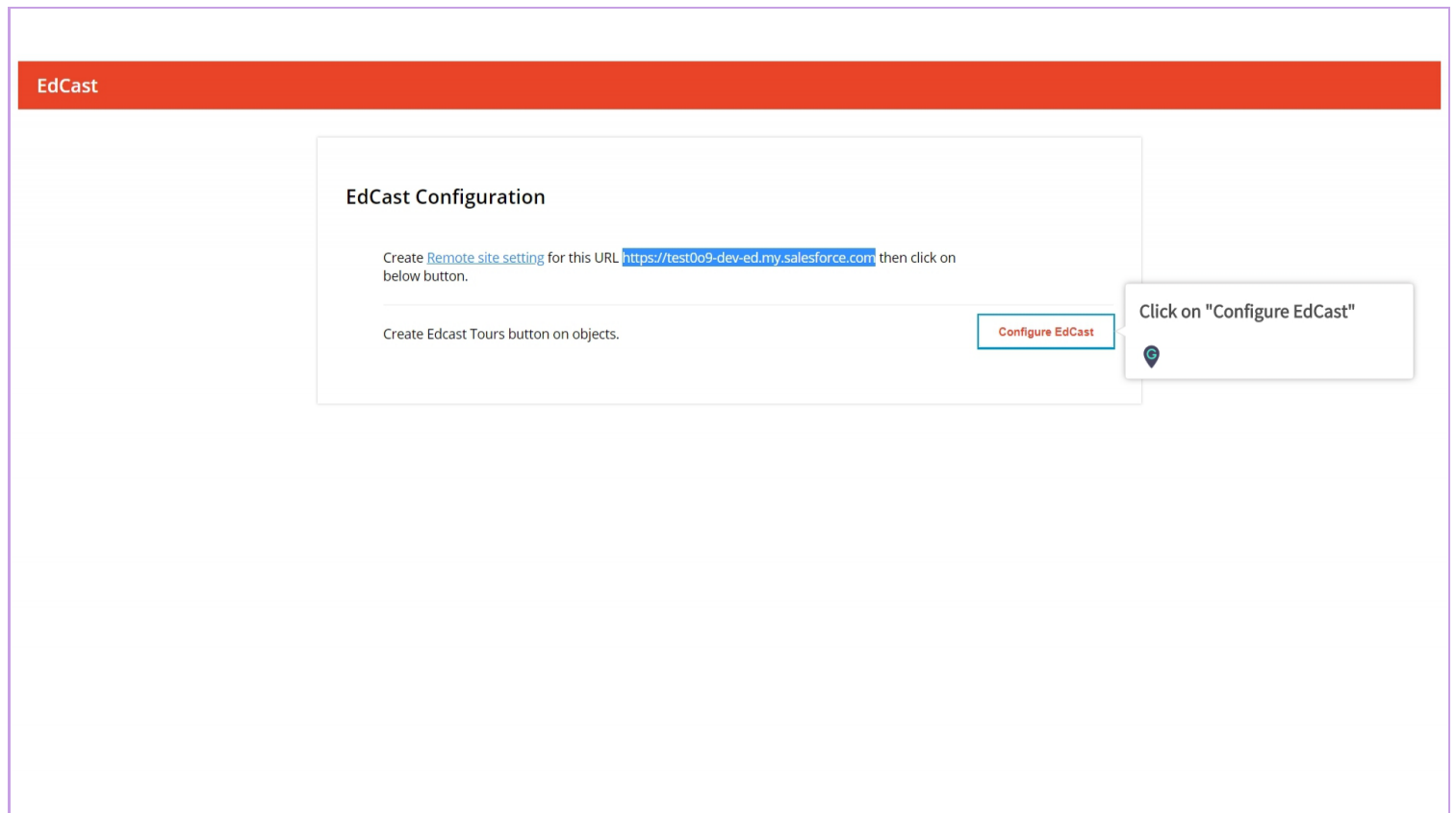
Remote Site Details have been updated

Now, go back to the "Configuration Page"

The screenshot displays the 'Remote Site Settings' page in the SETUP application. The page title is 'Remote Site Settings' and the sub-header is 'Remote Site Details'. The main content area shows the details for a remote site named 'EdCastWalkthrough'. The details include the Remote Site URL 'https://test009-dev', a description, and the status 'Active' (checked). The 'Created By' field is populated with 'Deeksha Khaira, 2/1/2019 12:44 AM'. A modal dialog box is overlaid on the page, indicating that the 'Remote Site Details have been updated' and instructing the user to 'Now, go back to the "Configuration Page"'. The left sidebar shows the navigation menu with 'Remote Site Settings' selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.

Step: 18

Click on "Configure EdCast"



The screenshot shows the EdCast Configuration page in Salesforce. At the top is an orange header bar with the text "EdCast". Below this is a white box titled "EdCast Configuration". Inside this box, the text reads: "Create [Remote site setting](#) for this URL <https://test0o9-dev-ed.my.salesforce.com> then click on below button." Below this text is a button labeled "Configure EdCast". To the right of the button is a callout box with the text "Click on 'Configure EdCast'" and a location pin icon.

Step: 19

Batch execution is Processing

It will take some time

EdCast

Batch execution is Processing

EdCast Configuration

Create [Remote site setting](#) for this URL <https://test0o9-dev-ed.my.salesforce.com> then click on below button.

Create Edcast Tours button on

It will take some time

Configure EdCast

Step: 20

Batch processing completed!

After this configuration MyGuide button will be visible on Opportunities, Leads, Accounts, and Contacts page layout in Salesforce Classic

EdCast

Batch processing completed!

EdCast Configuration

Create [Remote site setting](#) for the below button.

Create Edcast Tours button on the page layout

Batch processing completed!

After this configuration MyGuide button will be visible on Opportunities, Leads, Accounts, and Contacts page layout in Salesforce Classic

[Configure EdCast](#)

Thank You!

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