



Configure MyGuide for Salesforce Community

Step: 01

Welcome to MyGuide

In this guide we will learn how to configure MyGuide for Community

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 chart includes a goal line and a line for 'Closed + Open (>70%)'. A pop-up window titled 'Welcome to MyGuide' is overlaid on the chart, stating: 'In this guide we will learn how to configure MyGuide for Community'. Above the chart, it shows 'CLOSED \$1,820,000' and 'OPEN (>70%) \$270,000'.
- Assistant:** A sidebar on the right containing a list of notifications 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 graphic of a mountain range and a sun.
- Today's Tasks:** A section with a decorative graphic of a person working at a desk and a calendar, 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: 02

Click the gear cog icon

The screenshot shows a Salesforce dashboard interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and a menu with items like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and Reports. A callout box with the text "Click the gear cog icon" points to the gear icon in the top right corner. 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 a line for "Closed + Open (>70%)". Below the chart are sections for "Today's Events" and "Today's Tasks". On the right side, there is an "Assistant" panel with a list of notifications, including "New lead assigned to you today", "Opportunity is overdue", and "30 days without any activity".

Quarterly Performance

CLOSED \$1,820,000 OPEN (>70%) \$270,000 GOAL --

As of Today 12:28:59 AM

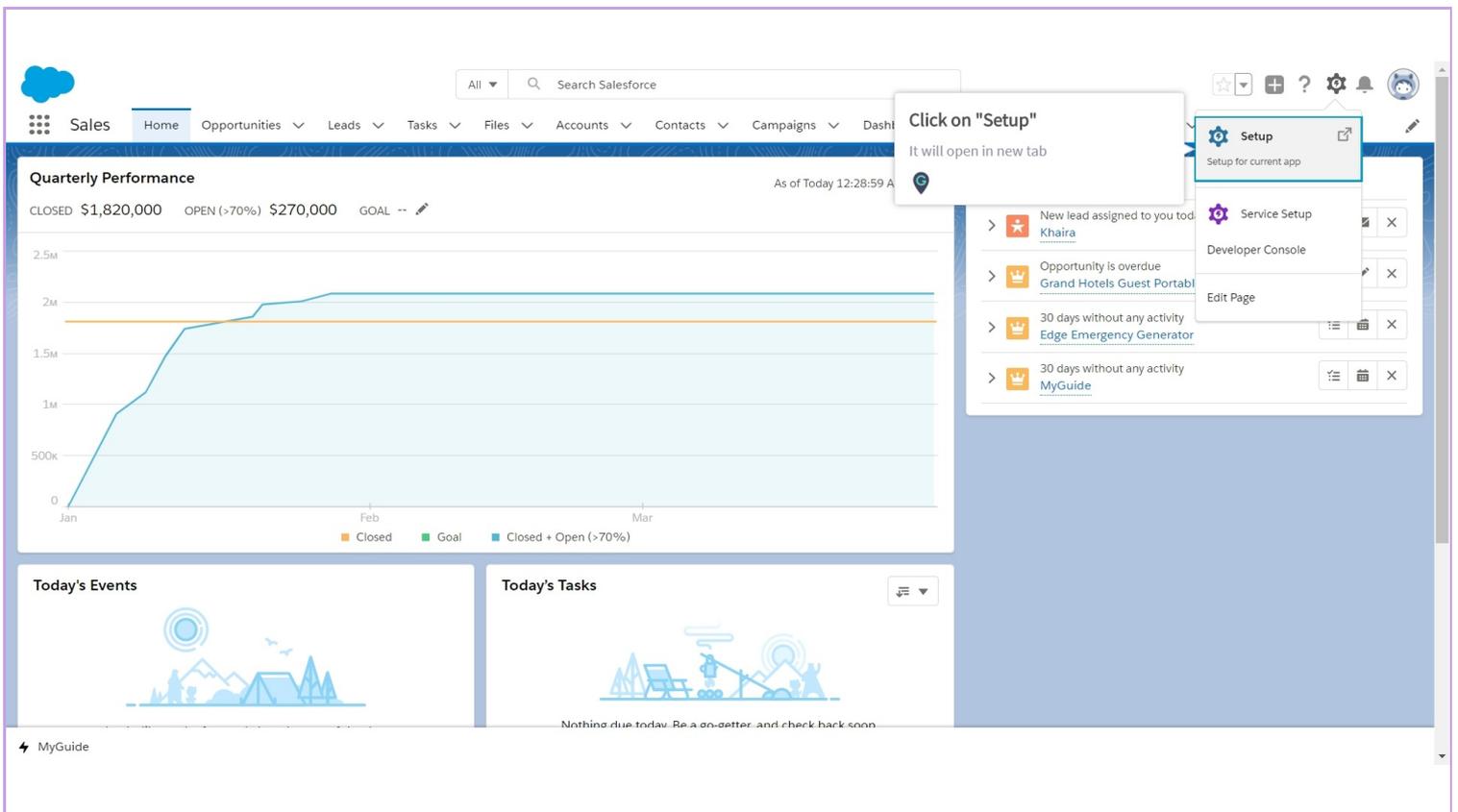
Assistant

- New lead assigned to you today
Khaira
- Opportunity is overdue
Grand Hotels Guest Portable Generators
- 30 days without any activity
Edge Emergency Generator
- 30 days without any activity
MyGuide

Step: 03

Click on "Setup"

It will open in new tab



Step: 04

Enter Communities

The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled 'Search Setup' and a navigation bar with 'Setup', 'Home', and 'Object Manager'. A dropdown menu is open under 'Setup', showing 'Quick Find' and 'Enter Communities'. The 'Enter Communities' menu is highlighted, and a location pin icon is visible next to it. Below the navigation bar, there are three main cards: 'mySalesforce', 'Go Mobile', and 'Visit AppExchange'. The 'mySalesforce' card includes a description and two buttons: 'Learn More' and 'Take the Trailhead Module'. The 'Go Mobile' card includes a description and a 'Get Started' button. The 'Visit AppExchange' card includes a description and a 'Get Started' button. Below these cards is a section titled 'Most Recently Used' with a sub-header '10 items'. This section contains a table with columns for 'NAME', 'TYPE', and 'OBJECT'. The table lists two items: 'MyGuide Site Guest User' (User) and 'LightningSelfRegisterController' (Apex Class).

NAME	TYPE	OBJECT
MyGuide Site Guest User	User	
LightningSelfRegisterController	Apex Class	

Step: 05

Click on "All Communities"

The screenshot shows the Salesforce Setup interface. On the left sidebar, under 'Feature Settings', the 'Communities' section is expanded, and 'All Communities' is highlighted with a blue box. A white callout box with the text 'Click on "All Communities"' points to this menu item. The main content area shows a 'Home' dashboard with three cards: 'mySalesforce', 'Go Mobile', and 'Visit AppExchange'. Below the dashboard is a 'Most Recently Used' section with a table of items.

NAME	TYPE	OBJECT
MyGuide Site Guest User	User	
LightningSelfRegisterController	Apex Class	

Step: 06

Click on "Builder"

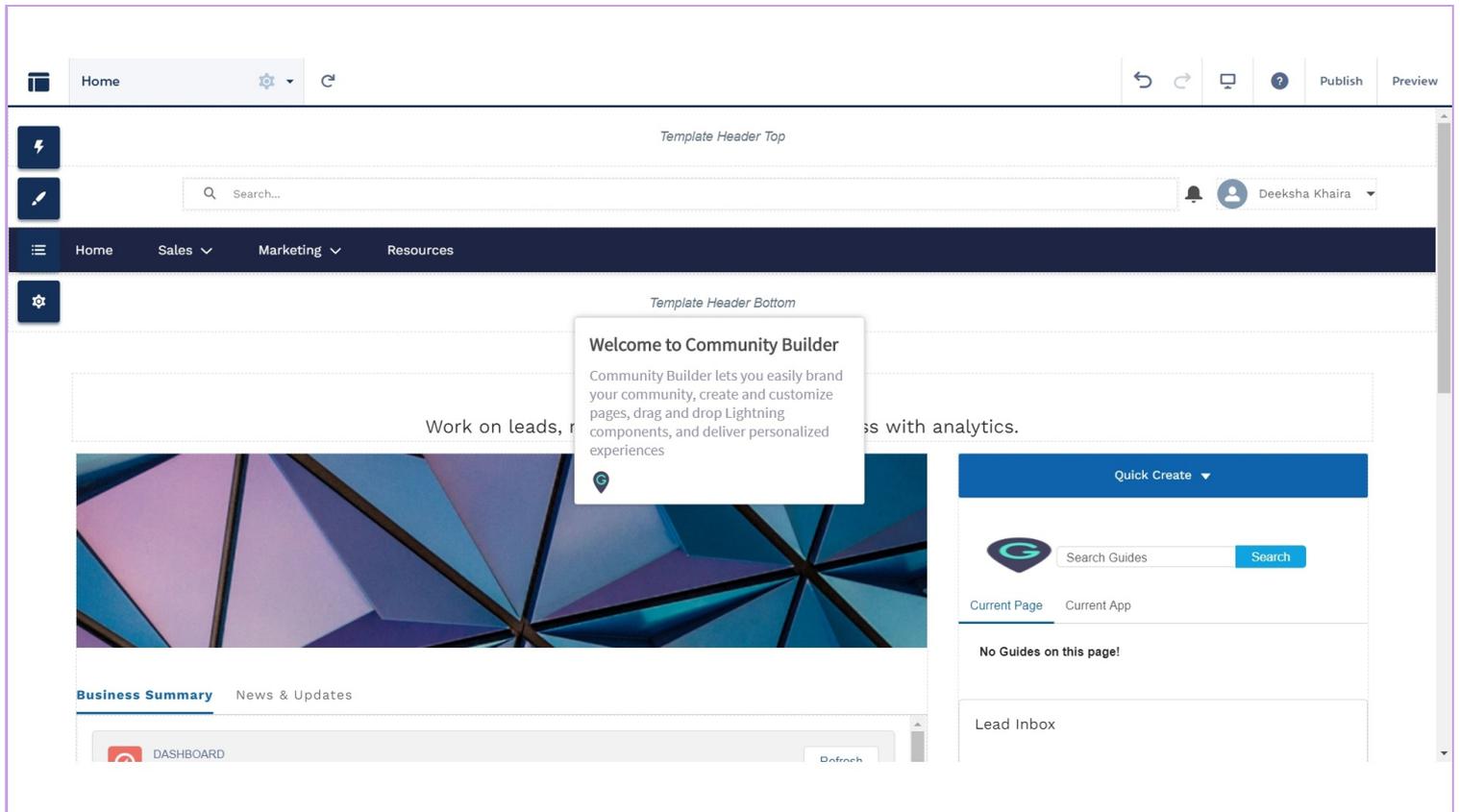
The screenshot shows the Salesforce Setup interface for the 'All Communities' section. The left sidebar contains a navigation menu with 'Communities' expanded, showing 'All Communities' as the selected item. The main content area displays a table of communities. A callout box with a location pin icon and the text 'Click on "Builder"' points to the 'Builder' link in the 'Action' column of the table.

Action	URL	Status
Workspaces Builder	https://test0o9-developer-edition.ap8.force.com	Preview

Step: 07

Welcome to Community Builder

Community Builder lets you easily brand your community, create and customize pages, drag and drop Lightning components, and deliver personalized experiences



Step: 08

Click on "Components"



The screenshot shows a CRM dashboard interface. At the top right, there are navigation buttons for 'Publish' and 'Preview'. Below the navigation bar is a dark blue header with menu items: 'Home', 'Sales', 'Marketing', and 'Resources'. A callout box with a white background and a dark border is positioned over the 'Components' icon in the top left. The main content area features a 'Welcome!' message and the text 'Work on leads, register deals, and track progress with analytics.' Below this, there is a 'Lead Inbox' section with four lead entries, each with an 'Accept' button. To the right, there is a 'My Opportunities' section with a 'Quick Create' button and a list of opportunities.

Lead Inbox	
Ms. Bertha Boxer Director of Vendor Relations · Farmers Coop. of Florida · (850) 644-4200 · bertha@fcof.net	Accept
Ms Phyllis Cotton CFO · Abbott Insurance · (703) 757-1000 · pcotton@abbottins.net	Accept
Mr Jeff Glimpse SVP, Procurement · Jackson Controls · 886-2-25474189 · jeffg@jackson.com	Accept
Mr Mike Braund VP, Technology · Metropolitan Health Services · (410) 381-2334 ·	Accept

My Opportunities	
Burlington Textiles Weaving Plant Generator Burlington Textiles Corp of America · 3/8/2019 · \$235,000.00 · ashvini rawal	
Demo	9/20/2019 · \$132,600,000.00 · ashvini rawal
Demo1	3/1/1995 · ashvini rawal
Dickenson Mobile Generators	

Step: 09

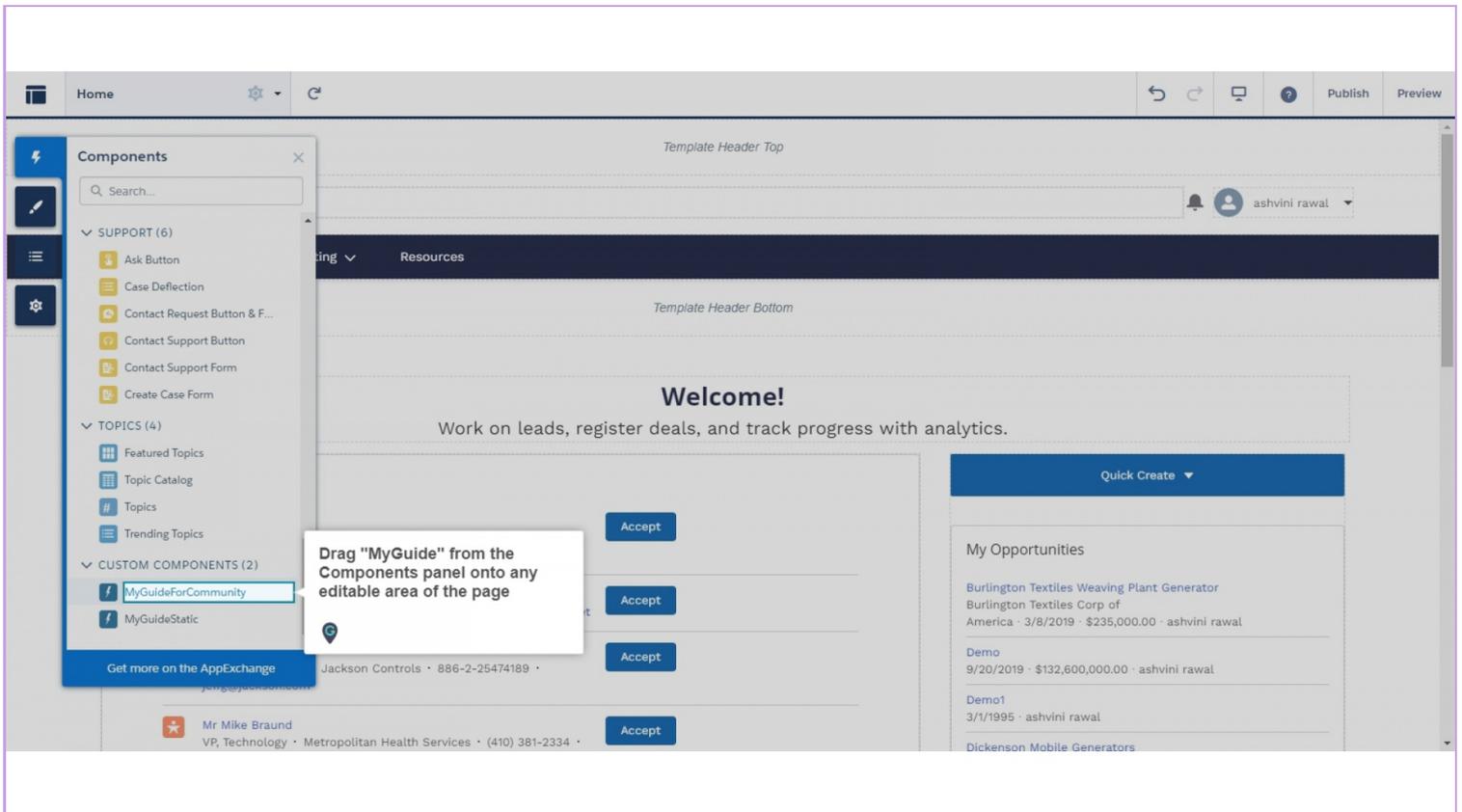
Go to "Custom Components"

The screenshot displays a CRM dashboard interface. On the left, a 'Components' sidebar menu is open, showing categories: SUPPORT (6), TOPICS (4), and CUSTOM COMPONENTS (2). The 'CUSTOM COMPONENTS (2)' category is highlighted with a blue bar, and a callout box points to it with the text "Go to 'Custom Components'". Below this, two items are listed: 'MyGuideForCommunity' and 'MyGuideStatic'. The main dashboard area shows a 'Welcome!' message, a 'Resources' section, and a 'My Opportunities' section with a table of leads. The top navigation bar includes 'Home', 'Publish', and 'Preview' buttons.

Opportunity Name	Date	Amount	Owner
Burlington Textiles Weaving Plant Generator	3/8/2019	\$235,000.00	ashvini rawal
Demo	9/20/2019	\$132,600,000.00	ashvini rawal
Demo1	3/1/1995		ashvini rawal
Dickenson Mobile Generators			

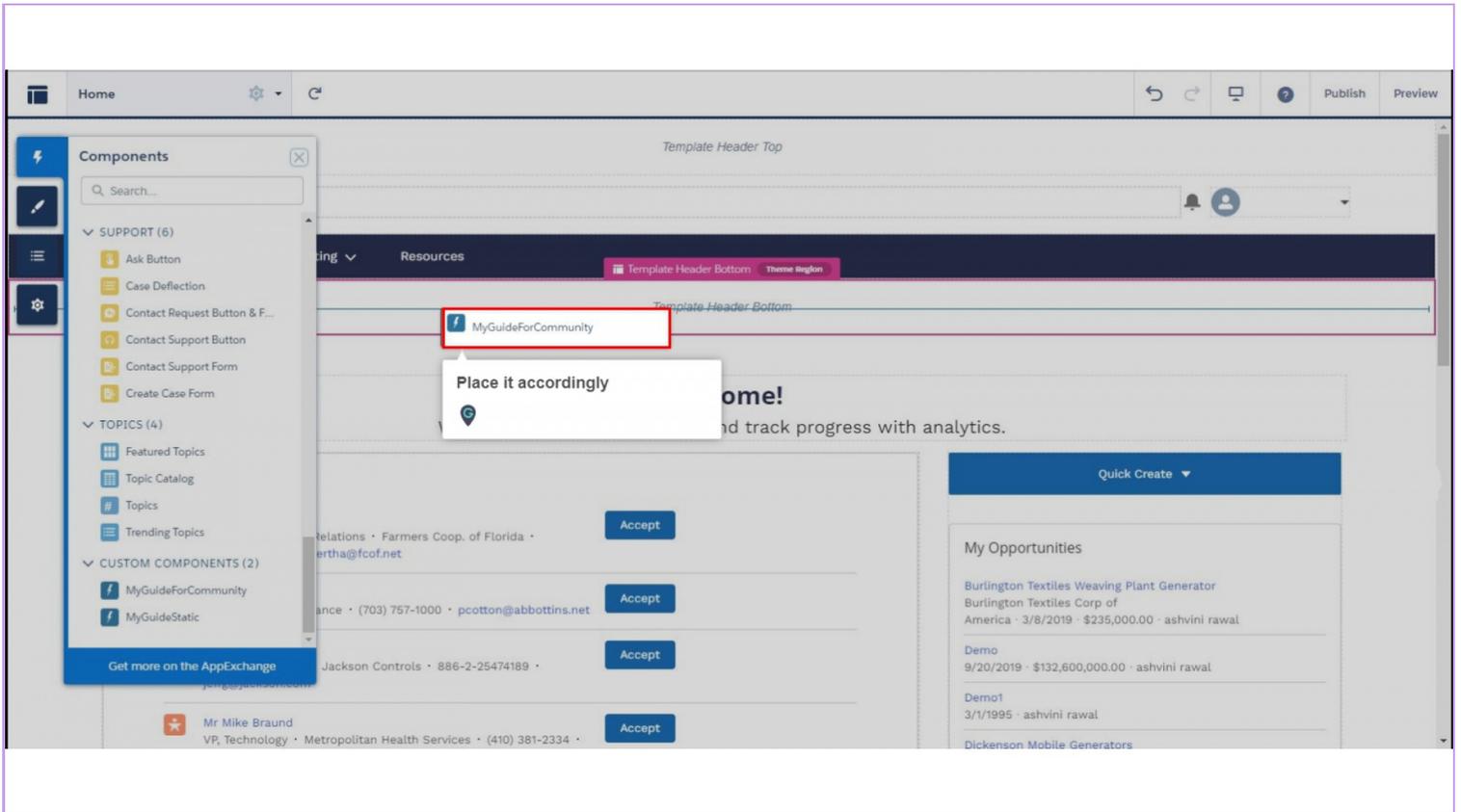
Step: 10

Drag "MyGuide" from the Components panel onto any editable area of the page



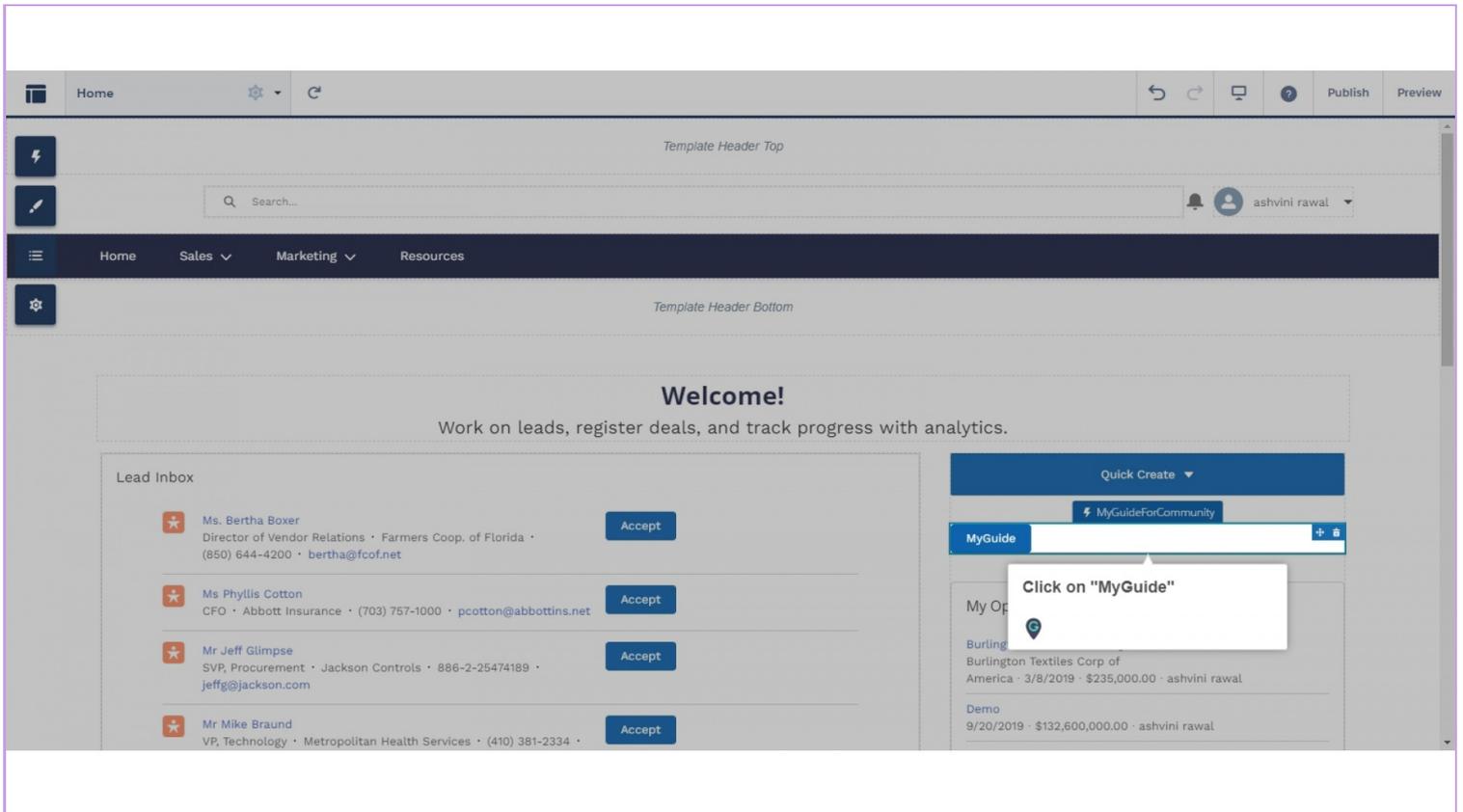
Step: 11

Place it accordingly



Step: 12

Click on "MyGuide"



Step: 13

Click on "Show More"

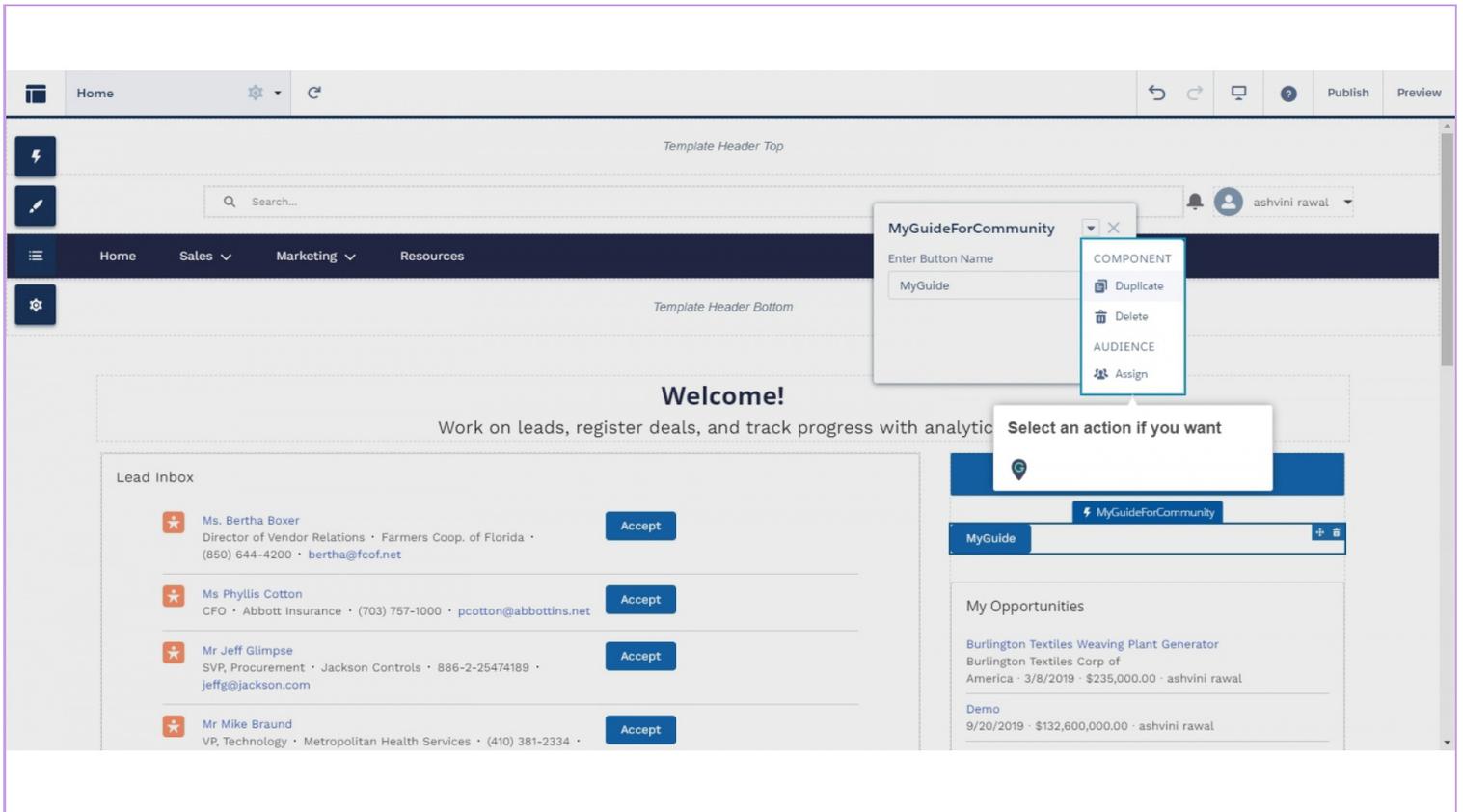
The screenshot displays the MyGuideForCommunity dashboard interface. At the top, there is a navigation bar with 'Home', 'Sales', 'Marketing', and 'Resources' menus. A search bar is located below the navigation. The main content area features a 'Welcome!' message and a 'Lead Inbox' section with four lead entries, each with an 'Accept' button. To the right, there is a 'My Opportunities' section. A callout box titled 'Click on "Show More"' points to the 'Show More' button on the 'MyGuide' widget. A secondary callout box titled 'MyGuideForCommunity' shows the 'Enter Button Name' field with 'MyGuide' entered.

Lead Inbox	
Ms. Bertha Boxer Director of Vendor Relations · Farmers Coop. of Florida · (850) 644-4200 · bertha@fcof.net	Accept
Ms Phyllis Cotton CFO · Abbott Insurance · (703) 757-1000 · pcotton@abbottins.net	Accept
Mr Jeff Glimpse SVP, Procurement · Jackson Controls · 886-2-25474189 · jeffg@jackson.com	Accept
Mr Mike Braund VP, Technology · Metropolitan Health Services · (410) 381-2334 ·	Accept

My Opportunities	
Burlington Textiles Weaving Plant Generator Burlington Textiles Corp of America · 3/8/2019 · \$235,000.00 · ashvini rawal	
Demo 9/20/2019 · \$132,600,000.00 · ashvini rawal	

Step: 14

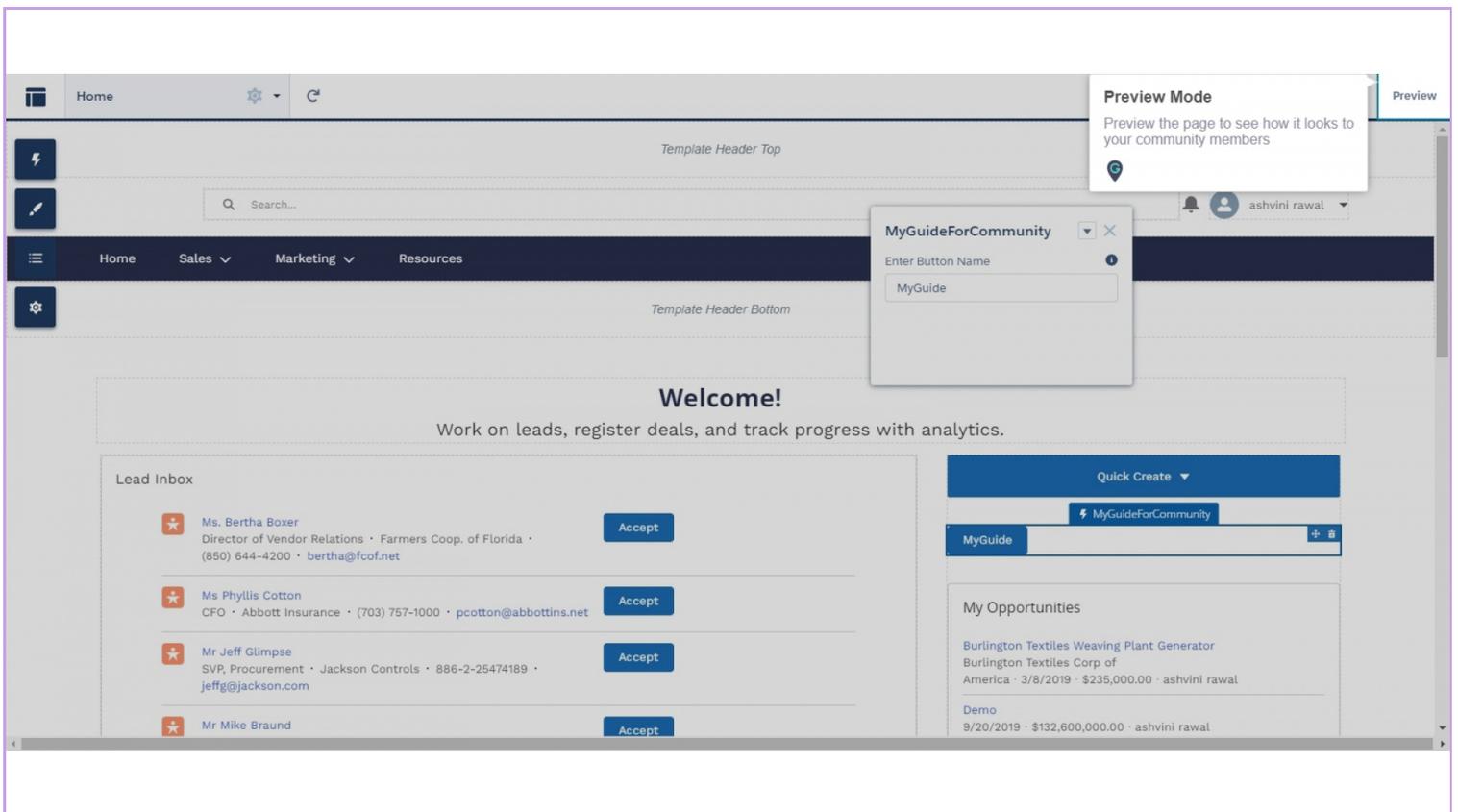
Select an action if you want



Step: 15

Preview Mode

Preview the page to see how it looks to your community members



Step: 16

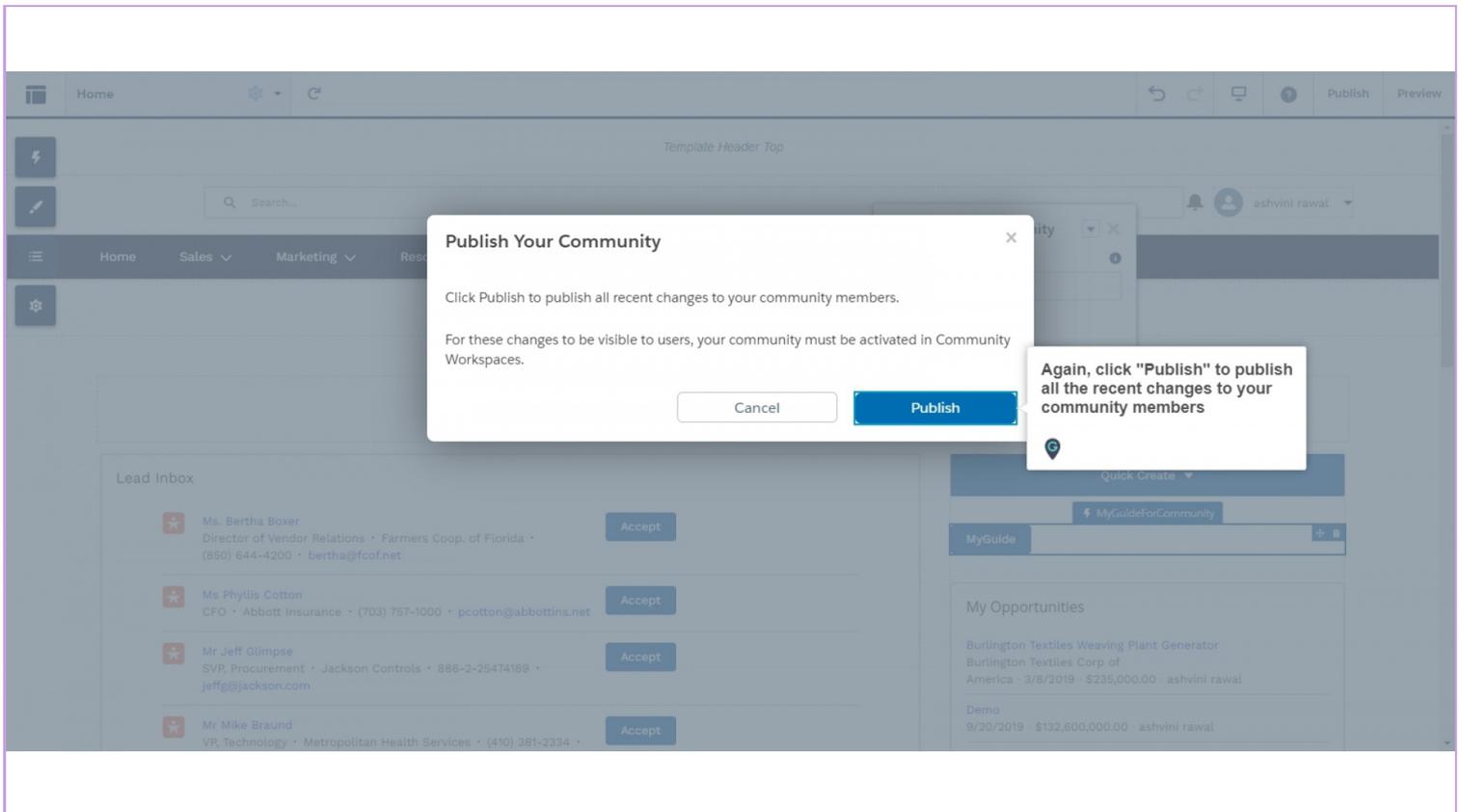
Click on "Publish"

Publish your changes to make the updates available to everyone in your community

The screenshot shows a CRM dashboard interface. At the top, there is a navigation bar with 'Home', 'Sales', 'Marketing', and 'Resources' menus. A search bar is located below the navigation. The main content area features a 'Welcome!' message and a 'Lead Inbox' section with four lead entries, each with an 'Accept' button. On the right, there is a 'Quick Create' dropdown menu with 'MyGuideForCommunity' selected, and a 'My Opportunities' section listing various deals. A callout box titled 'Click on "Publish"' is overlaid on the dashboard, containing the text: 'Publish your changes to make the updates available to everyone in your community'. The callout box is positioned over the 'MyGuideForCommunity' dropdown menu.

Step: 17

Again, click "Publish" to publish all the recent changes to your community members

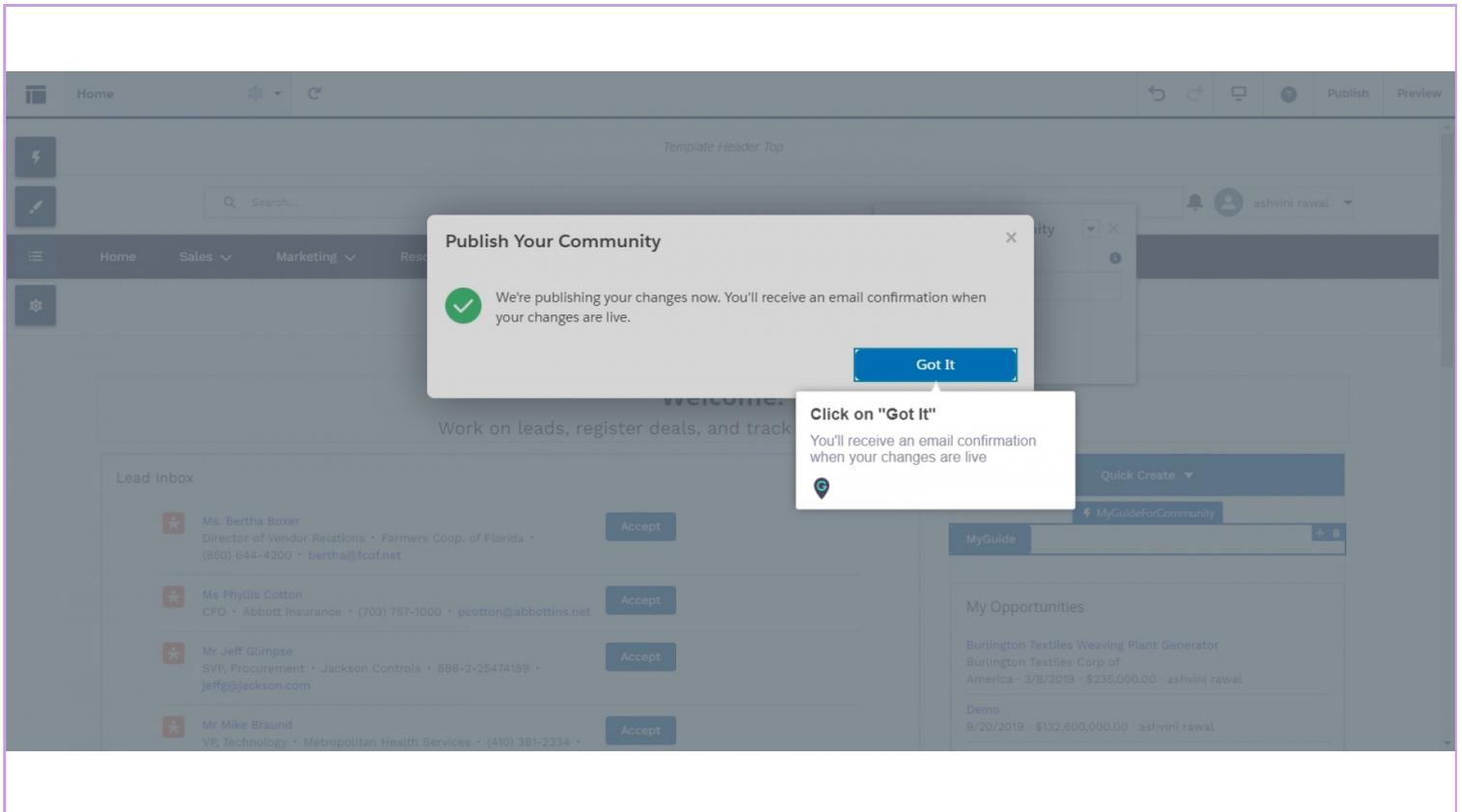


The screenshot displays the MyGuideForCommunity user interface. A central dialog box titled "Publish Your Community" is open, containing the following text: "Click Publish to publish all recent changes to your community members. For these changes to be visible to users, your community must be activated in Community Workspaces." Below the text are "Cancel" and "Publish" buttons. A secondary callout box on the right side of the dialog box states: "Again, click 'Publish' to publish all the recent changes to your community members". The background interface shows a navigation menu with "Home", "Sales", "Marketing", and "Res...". Below the menu is a "Lead Inbox" section with four lead entries, each with an "Accept" button. The leads are: Ms. Bertha Boxer (Director of Vendor Relations at Farmers Coop. of Florida), Ms Phyllis Cotton (CFO at Abbott Insurance), Mr Jeff Glimpse (SVP, Procurement at Jackson Controls), and Mr Mike Braund (VP, Technology at Metropolitan Health Services). On the right side, there is a "My Opportunities" section with two entries: "Burlington Textiles Weaving Plant Generator" and "Demo".

Step: 18

Click on "Got It"

You'll receive an email confirmation when your changes are live



Thank You!

myguide.org