

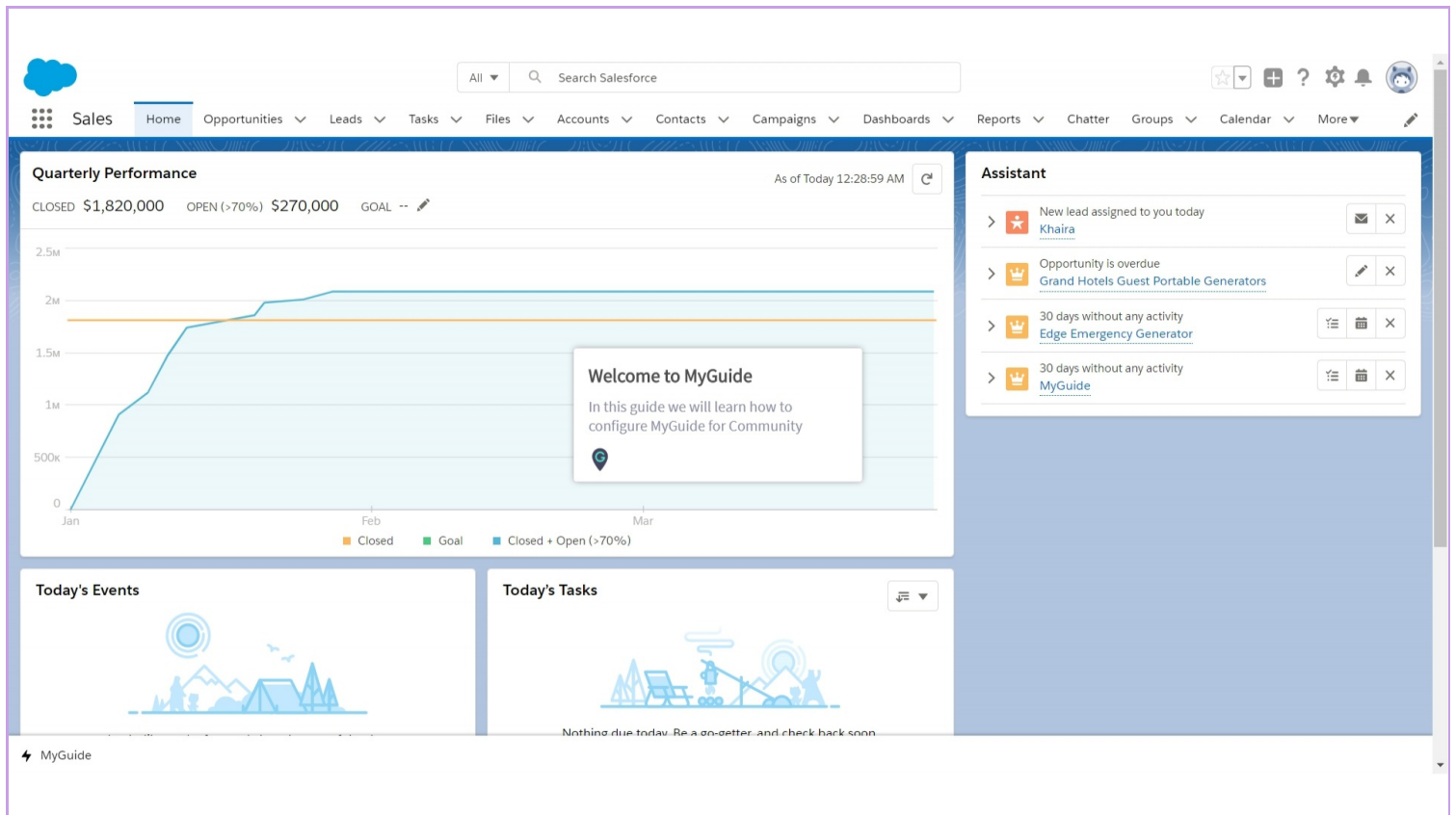


Configure MyGuide for Salesforce Community

Step: 01

Welcome to MyGuide

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



Step: 02

Click the gear cog icon

The screenshot shows the Salesforce Sales Home dashboard. At the top, there is a navigation bar with the Salesforce logo, a search bar, and a menu with options like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and Reports. 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 January to March. The chart includes a goal line and a line for 'Closed + Open (>70%)'. Below the chart, there are sections for 'Today's Events' and 'Today's Tasks'. On the right side of the dashboard, there is an 'Assistant' section with a list of tasks and notifications. A callout box with the text 'Click the gear cog icon' points to the gear icon in the top right corner of the dashboard.

Quarterly Performance

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

As of Today 12:28:59 AM

2.5M
2M
1.5M
1M
500k
0

Jan Feb Mar

Closed Goal Closed + Open (>70%)

Today's Events

Today's Tasks

Nothing due today. Be a go-getter, and check back soon.

MyGuide

Click the gear cog icon

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

The screenshot shows the 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, and Dashboards. Below the navigation bar, the main content area displays a 'Quarterly Performance' chart showing sales data for January, February, and March. The chart includes a line for 'Closed' sales, a horizontal line for 'Goal', and a shaded area for 'Closed + Open (>70%)'. To the right of the chart, there is a list of notifications and alerts, including 'New lead assigned to you today', 'Opportunity is overdue', and '30 days without any activity'. A tooltip is visible over the 'Setup' gear icon in the top right corner, stating 'Click on "Setup" It will open in new tab'. The bottom of the dashboard features sections for 'Today's Events' and 'Today's Tasks'.

Step: 04

Enter Communities

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and several utility icons. The left sidebar contains a 'Setup' menu with a 'Quick Find' search bar and a list of categories: Setup Home, Lightning Experience, Lightning Usage, ADMINISTRATION (Users, Data, Email), PLATFORM TOOLS (Apps, Feature Settings, Einstein, Objects and Fields, Process Automation, User Interface, Custom Code, Development, Environments, Onboarding & Assistance, Integrations), and a 'Create' button. The main content area displays three cards: 'mySalesforce' (with 'Learn More' and 'Take the Trailhead Module' buttons), 'Go Mobile' (with a 'Get Started' button), and 'Visit AppExchange' (with a 'Get Started' button). Below these cards is a 'Most Recently Used' section showing a table of 10 items.

Enter Communities

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

10 items

NAME	TYPE	OBJECT
MyGuide Site Guest User	User	
LightningSelfRegisterController	Apex Class	

Step: 05

Click on "All Communities"

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Feature Settings', the 'Communities' section is expanded, and 'All Communities' is highlighted. A callout box with the text 'Click on "All Communities"' points to this link. The main content area shows the 'Home' page with three cards: 'mySalesforce', 'Go Mobile', and 'Visit AppExchange'. Below these cards is a 'Most Recently Used' section with a table of 10 items.

NAME	TYPE	OBJECT
MyGuide Site Guest User	User	
LightningSelfRegisterController	Apex Class	

Step: 06

Click on "Builder"

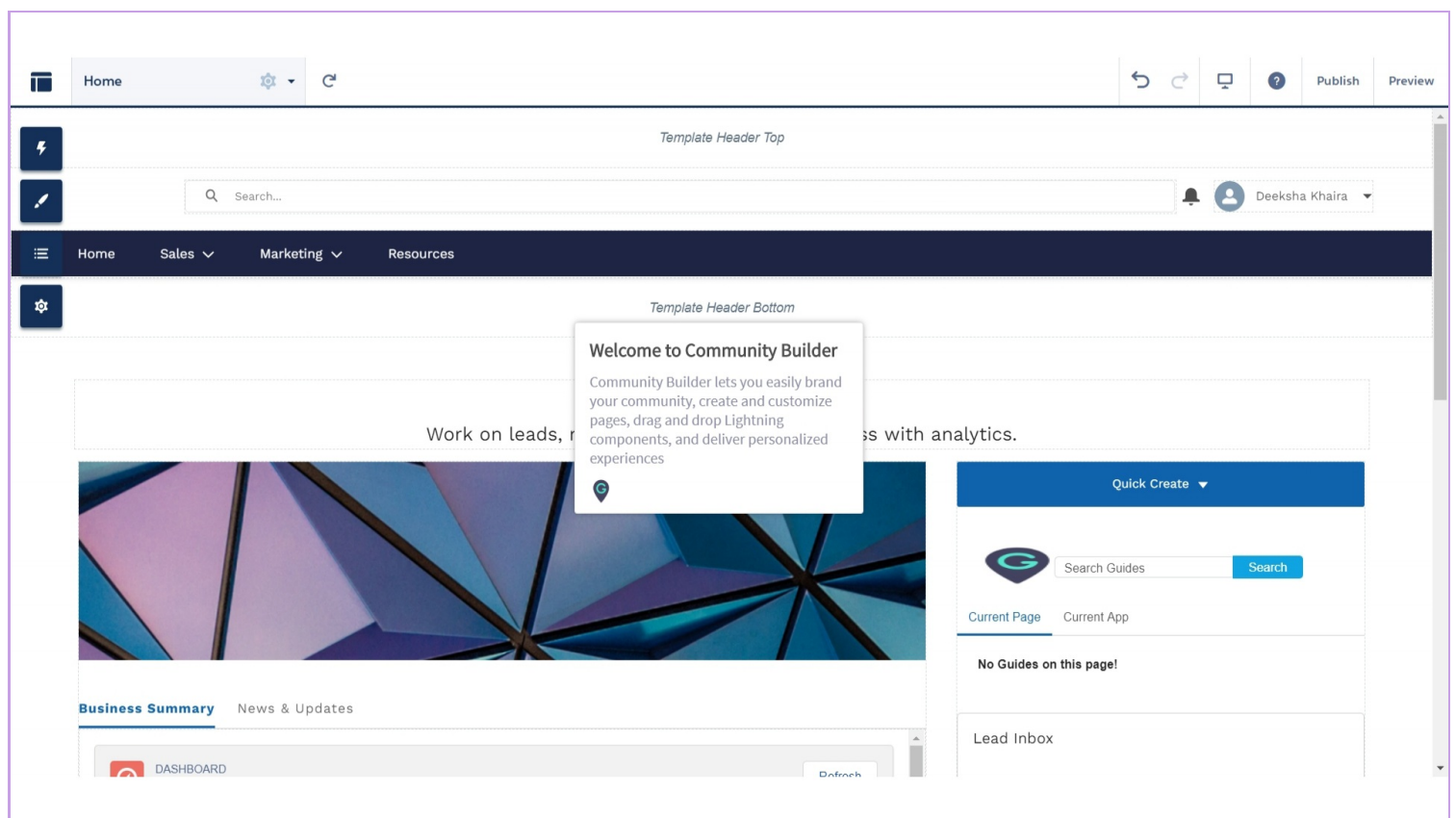
The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'communities' and a list of navigation items: 'Feature Settings', 'Communities', 'All Communities', 'Communities Settings', 'Lightning Community Pages', 'Lightning Community Tem...', and 'Lightning Community The...'. The main content area is titled 'All Communities' and includes a 'New Community' button. Below this is a table with columns 'Action', 'URL', and 'Status'. The 'Action' column has links for 'Workspaces' and 'Builder'. The 'URL' column contains the text 'https://test009-developer-edition.ap8.force.com'. The 'Status' column shows 'Preview'. A callout box with a location pin icon and the text 'Click on "Builder"' points to the 'Builder' link.

Action	URL	Status
Workspaces Builder	https://test009-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. A callout box with the text "Click on 'Components'" points to a lightning bolt icon in the left sidebar. The dashboard includes a top navigation bar with links for Home, Sales, Marketing, and Resources. The main content area features a "Welcome!" message, a "Lead Inbox" table with four leads, and a "My Opportunities" section with a "Quick Create" button.

Lead Inbox

Name	Company	Contact Info	Action
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

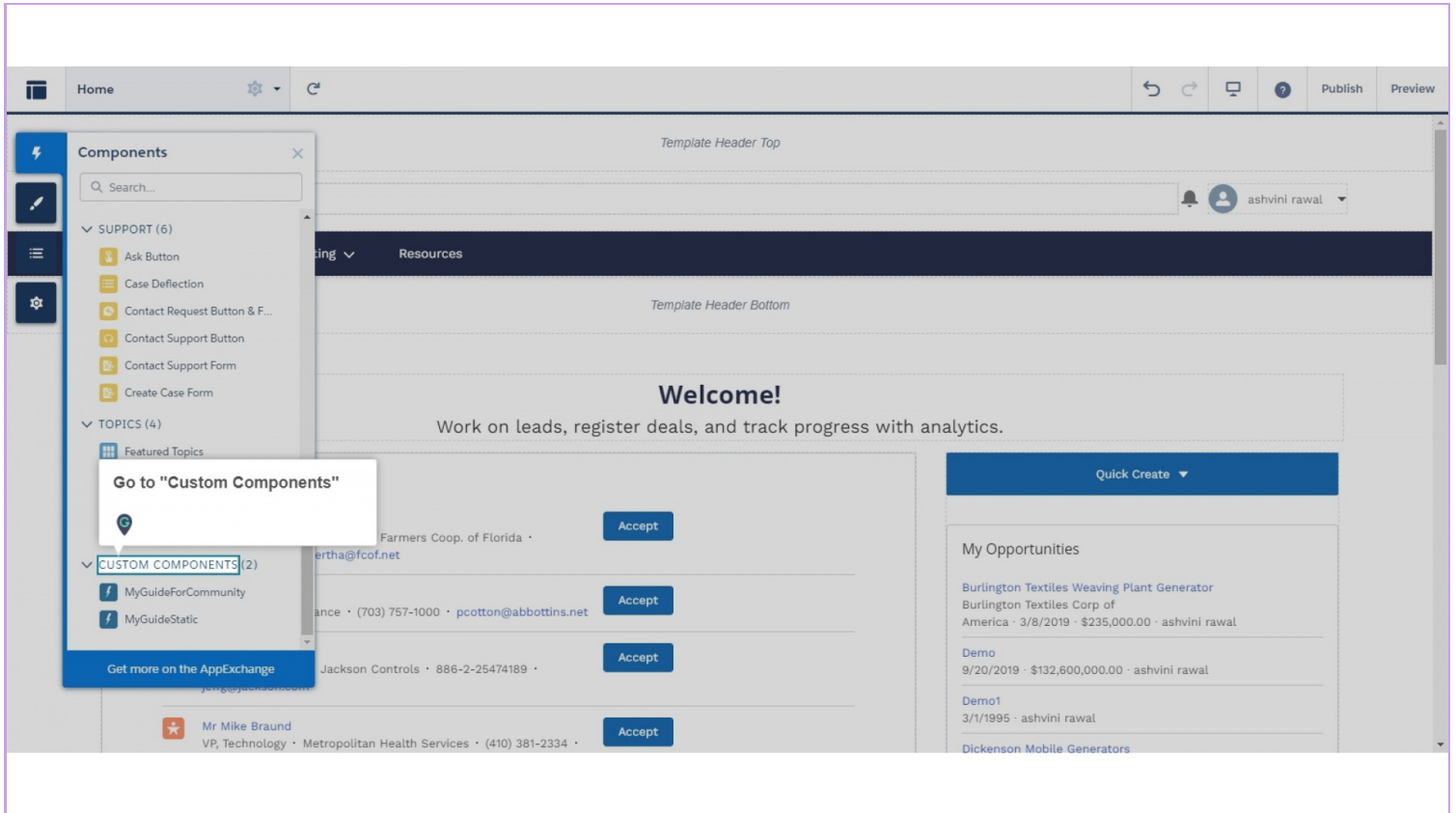
My Opportunities

[Quick Create](#)

- 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](#)

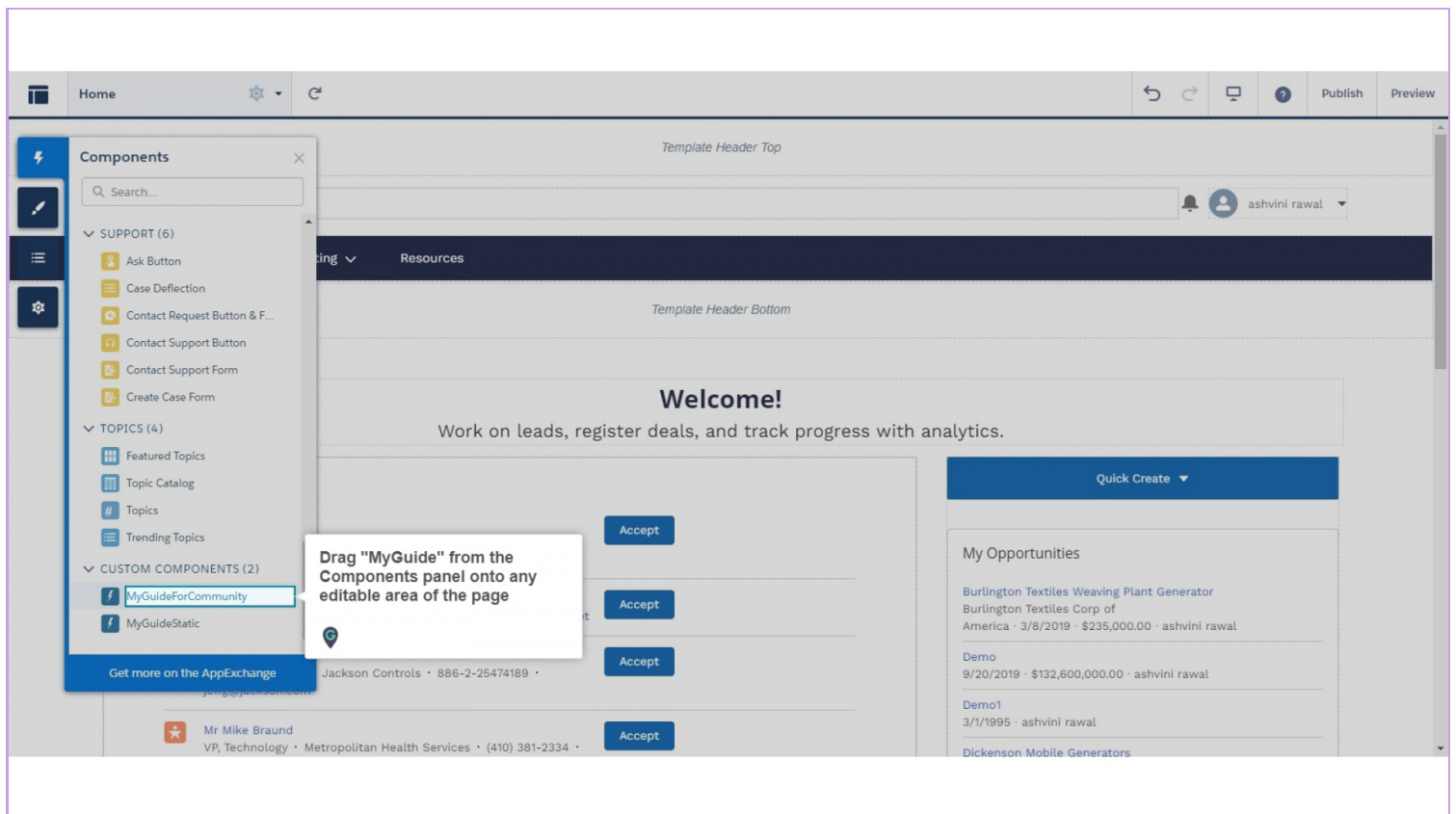
Step: 09

Go to "Custom Components"



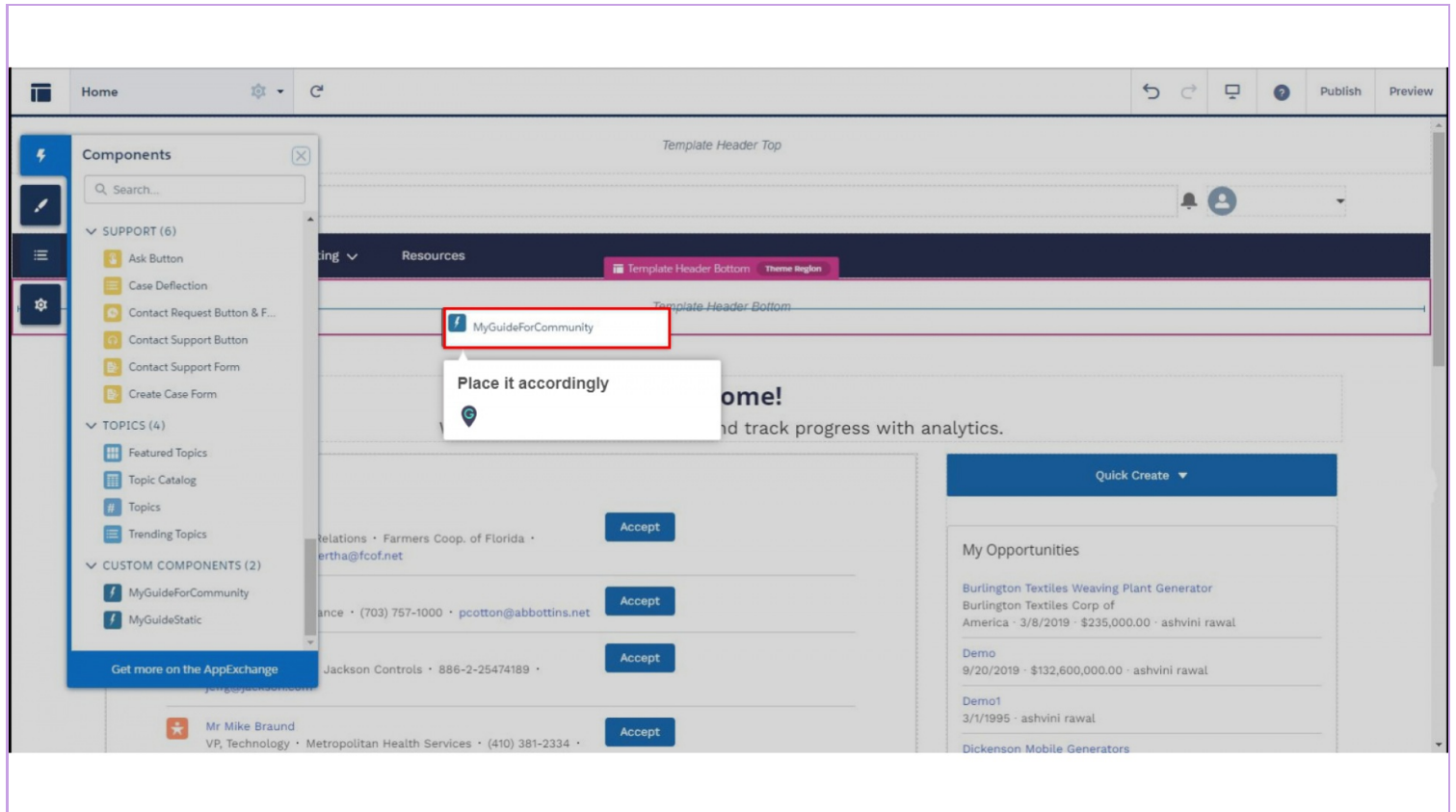
Step: 10

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



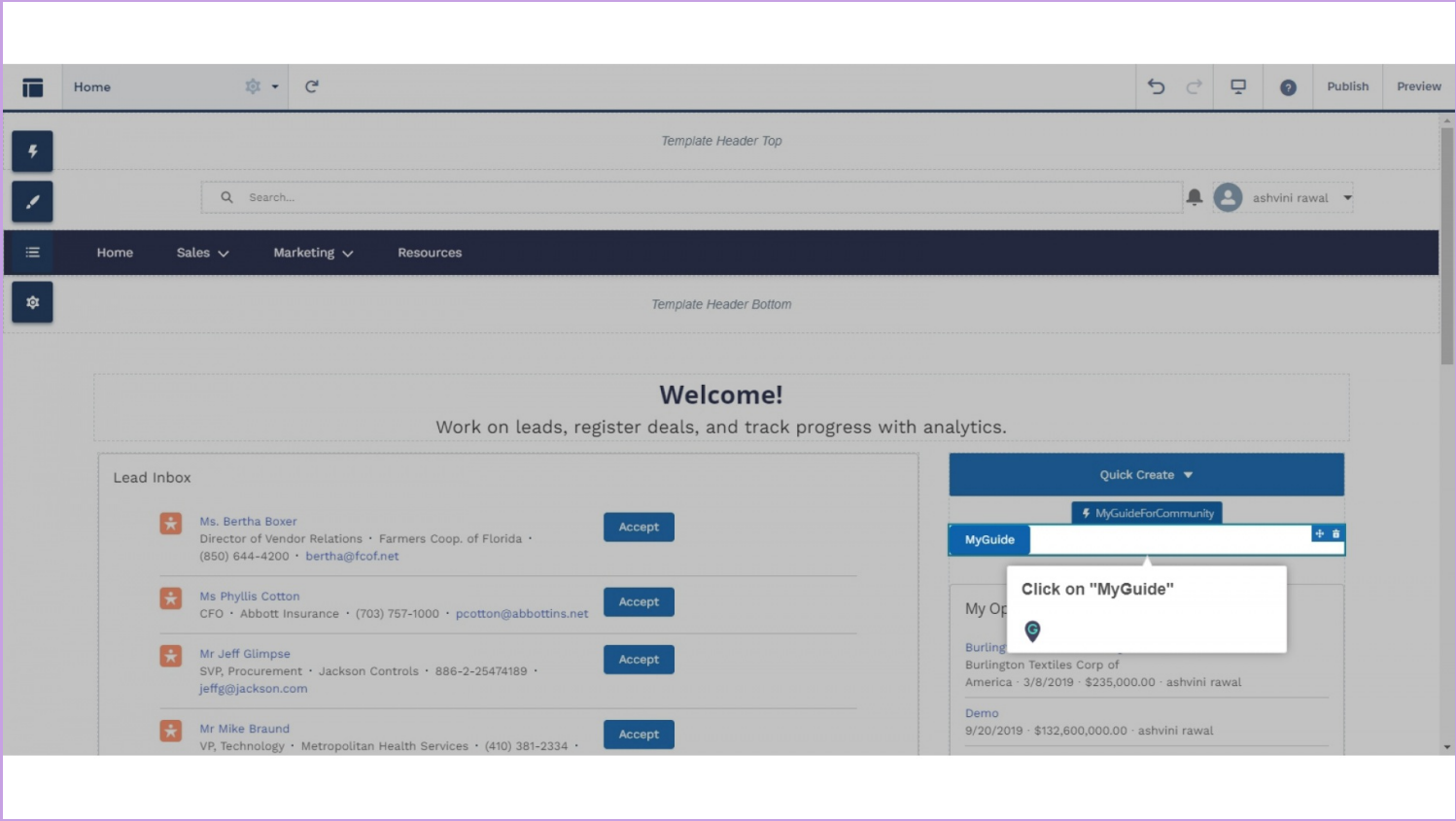
Step: 11

Place it accordingly



Step: 12

Click on "MyGuide"



Step: 13

Click on "Show More"

The screenshot displays the MyGuideForCommunity dashboard. At the top, there is a navigation bar with a 'Home' link, a settings icon, and a refresh icon. On the right side of the navigation bar, there are icons for undo, redo, a monitor, a help icon, and buttons for 'Publish' and 'Preview'. Below the navigation bar, there is a search bar and a user profile dropdown for 'ashvini rawal'. The main content area features a 'Welcome!' message and a prompt to 'Work on leads, register deals, and track progress with analytics.' On the left, there is a 'Lead Inbox' section with four leads, each with an 'Accept' button. On the right, there is a 'Quick Create' section with a 'MyGuideForCommunity' button and a 'My Opportunities' section listing two opportunities. A callout box labeled 'Click on "Show More"' points to a 'Show More' button in the 'My Opportunities' section.

Click on "Show More"

MyGuideForCommunity

Enter Button Name

MyGuide

Welcome!

Work on leads, register deals, and track progress with analytics.

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](#)

Quick Create

MyGuideForCommunity

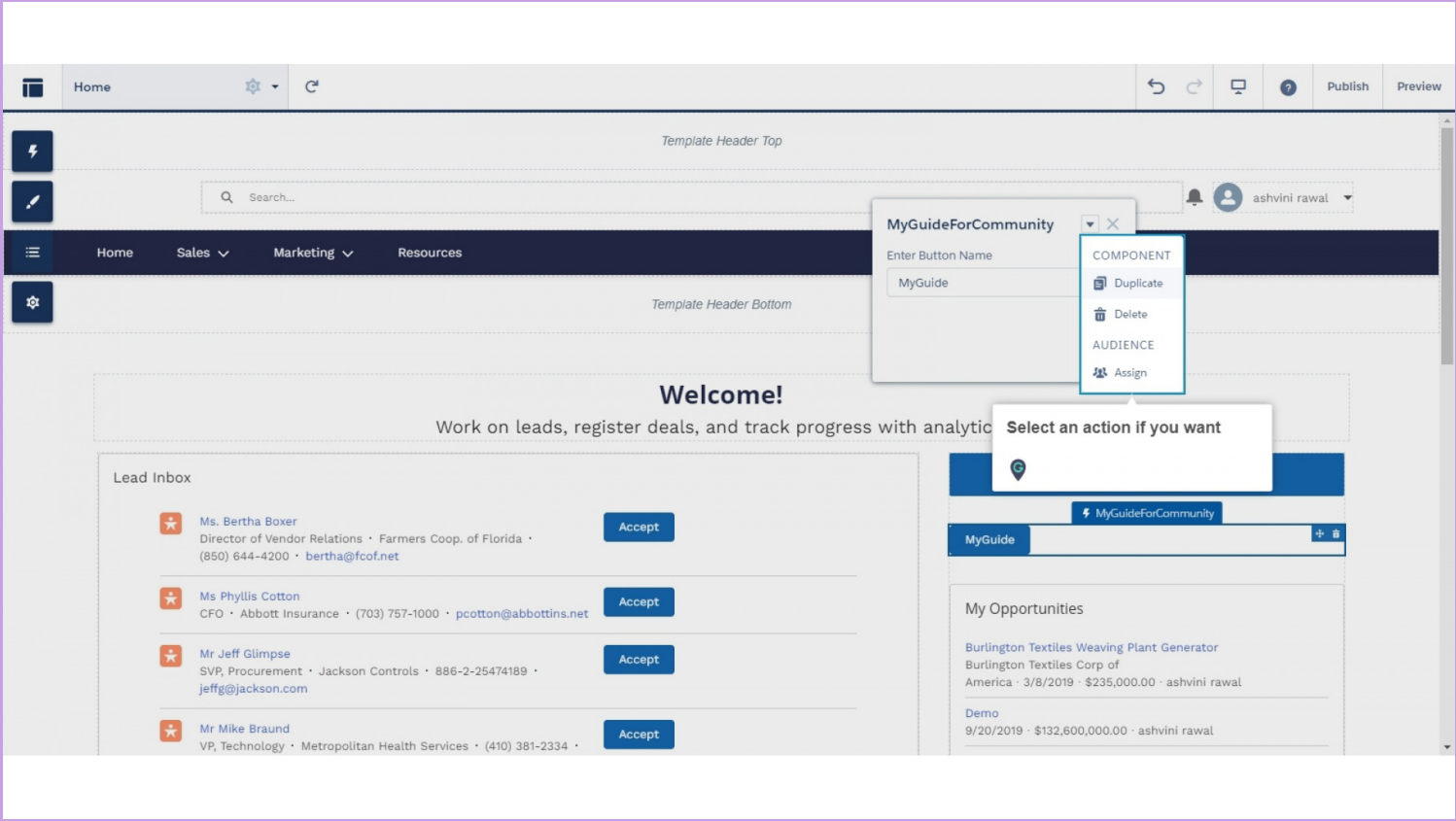
MyGuide

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

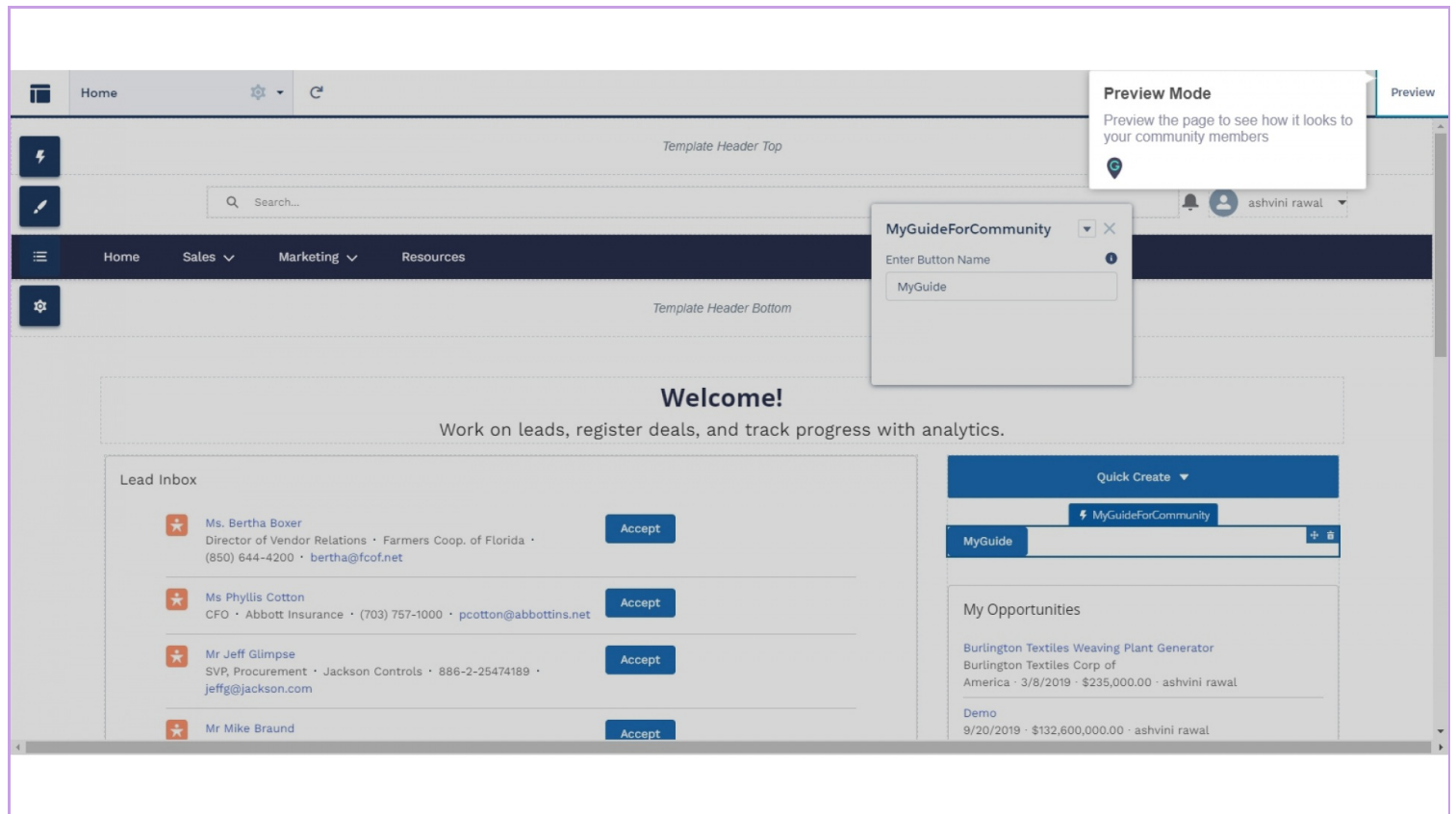
Select an action if you want



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

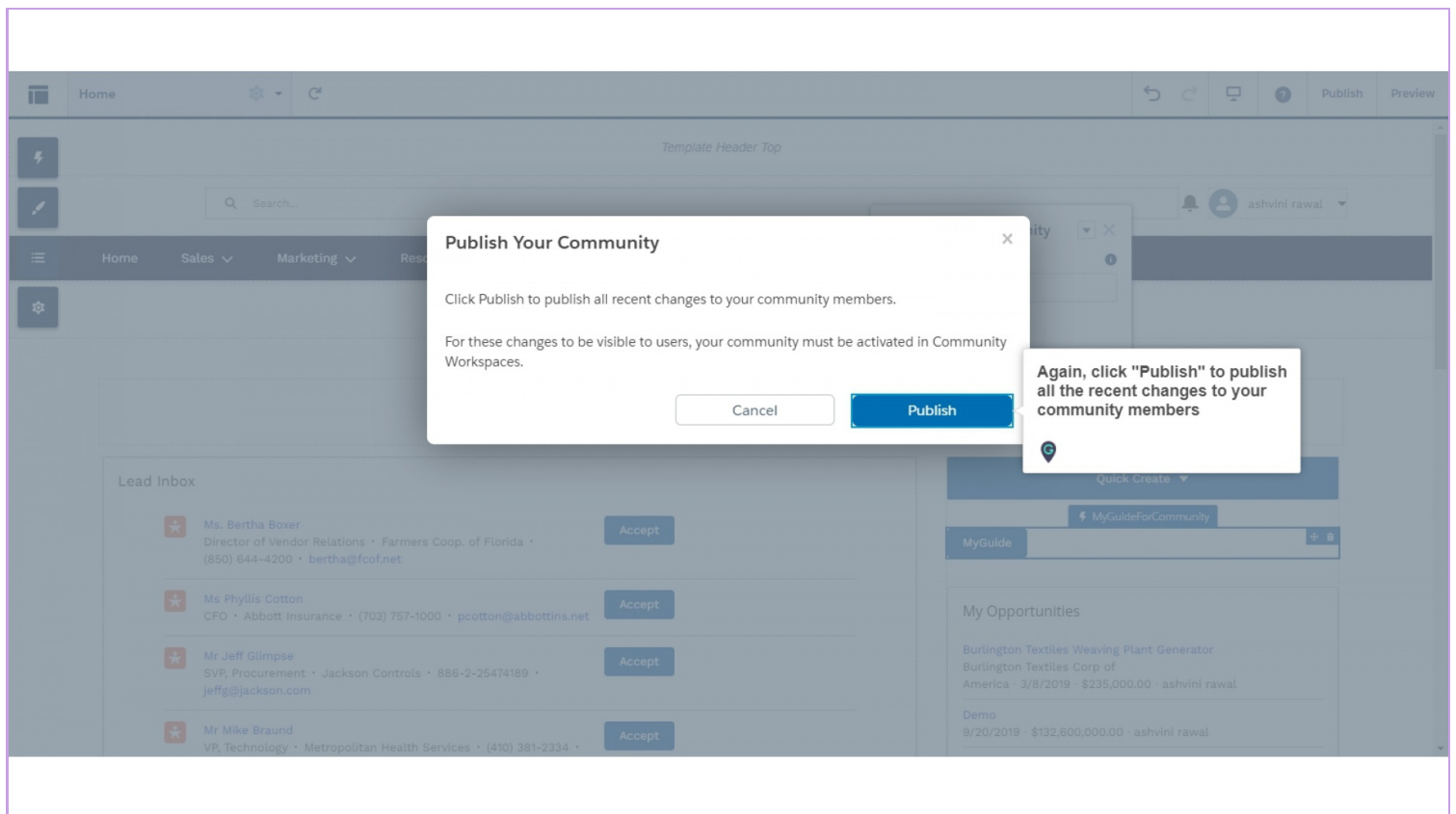
The screenshot displays the MyGuideForCommunity dashboard interface. At the top, there is a navigation bar with a 'Home' button, a settings icon, and a refresh icon. On the right side of the navigation bar, there are buttons for 'Publish' and 'Preview'. A callout box points to the 'Publish' button with the text: 'Click on "Publish" Publish your changes to make the updates available to everyone in your community'. Below the navigation bar, there is a search bar and a main content area. The main content area features a 'Welcome!' message and a 'Lead Inbox' section. The 'Lead Inbox' section contains a table of leads with columns for contact information and an 'Accept' button. The table lists four leads: Ms. Bertha Boxer, Ms Phyllis Cotton, Mr Jeff Glimpse, and Mr Mike Braund. To the right of the 'Lead Inbox' section, there is a 'Quick Create' dropdown menu and a 'My Opportunities' section. The 'My Opportunities' section contains a table of opportunities with columns for opportunity name, date, amount, and user. The table lists two opportunities: Burlington Textiles Weaving Plant Generator and Demo.

Lead	Accept
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

Opportunity	Date	Amount	User
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: 17

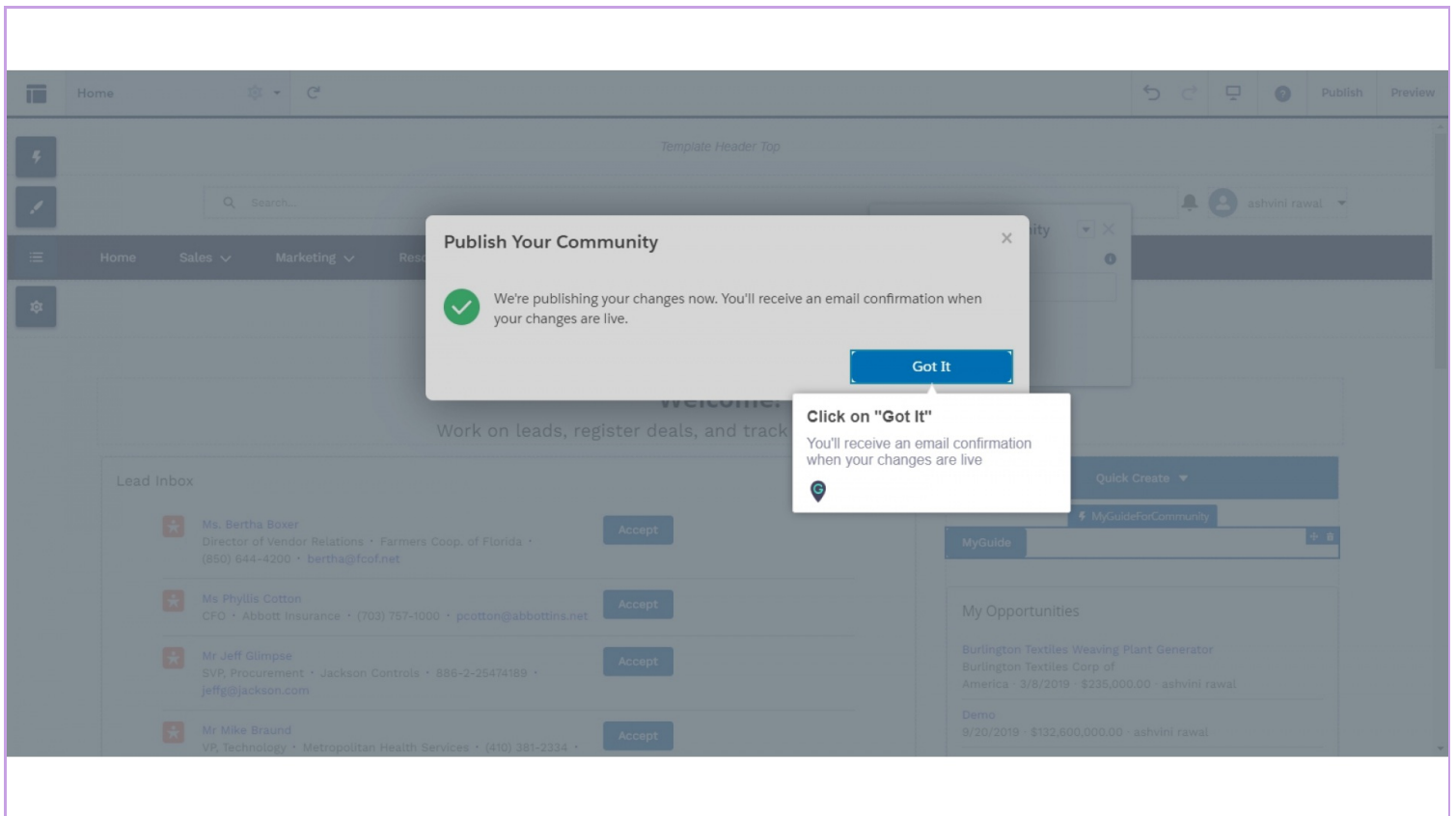
Again, click "Publish" to publish all the recent changes to your community members



Step: 18

Click on "Got It"

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



Thank You!

myguide.org