



How to Auto Login on MyGuide Chrome Player via MyGuide SFDC Application

Step: 01

Log into your Salesforce Account

Ensure that you have -1. Latest MyGuide SFDC App (version 3.7 or later), and 2. Latest MyGuide Chrome Player installed

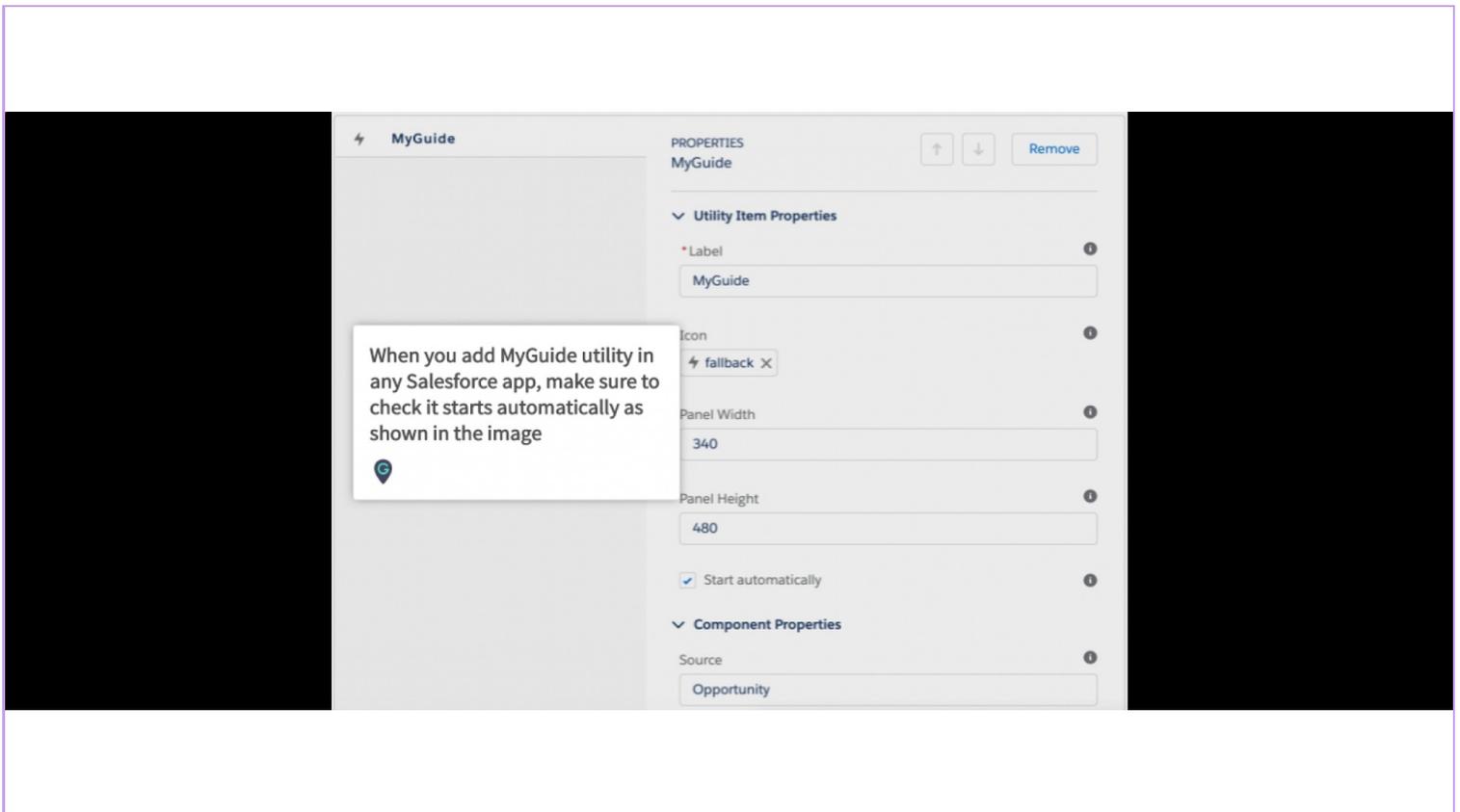
The screenshot shows a Salesforce dashboard interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various menu items like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. The main content area is divided into several sections:

- Quarterly Performance:** A line chart showing performance from July to September. The y-axis ranges from 0 to 3M. The chart includes data for 'Closed' (orange), 'Goal' (green), and 'Closed + Open (>70%)' (blue). A goal line is set at approximately 2.3M. A tooltip overlay is present over the chart with the following text:
Log into your Salesforce Account
Ensure that you have -
1. Latest MyGuide SFDC App (version 3.7 or later), and
2. Latest MyGuide Chrome Player installed
- Assistant:** A panel on the right side showing two items: 'Opportunity is overdue' for 'Edge Emergency Generator' and '30 days without any activity' for a 'Lead'.
- Today's Events:** A section with a light blue background and icons representing events.
- Today's Tasks:** A section with a light blue background and icons representing tasks.

In the bottom left corner of the dashboard, there is a small red-bordered box containing a lightning bolt icon and the text 'MyGuide'.

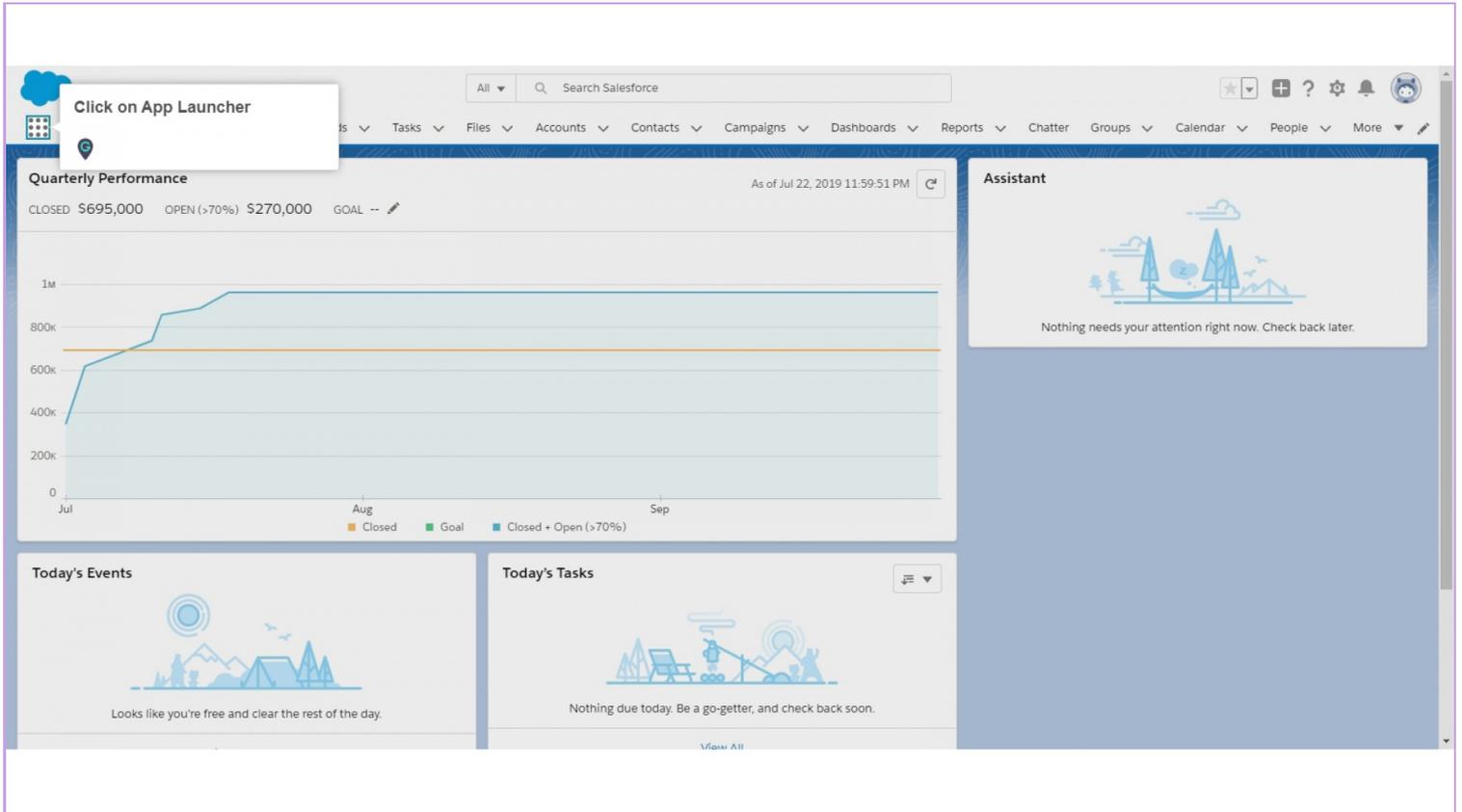
Step: 02

When you add MyGuide utility in any Salesforce app, make sure to check it starts automatically as shown in the image



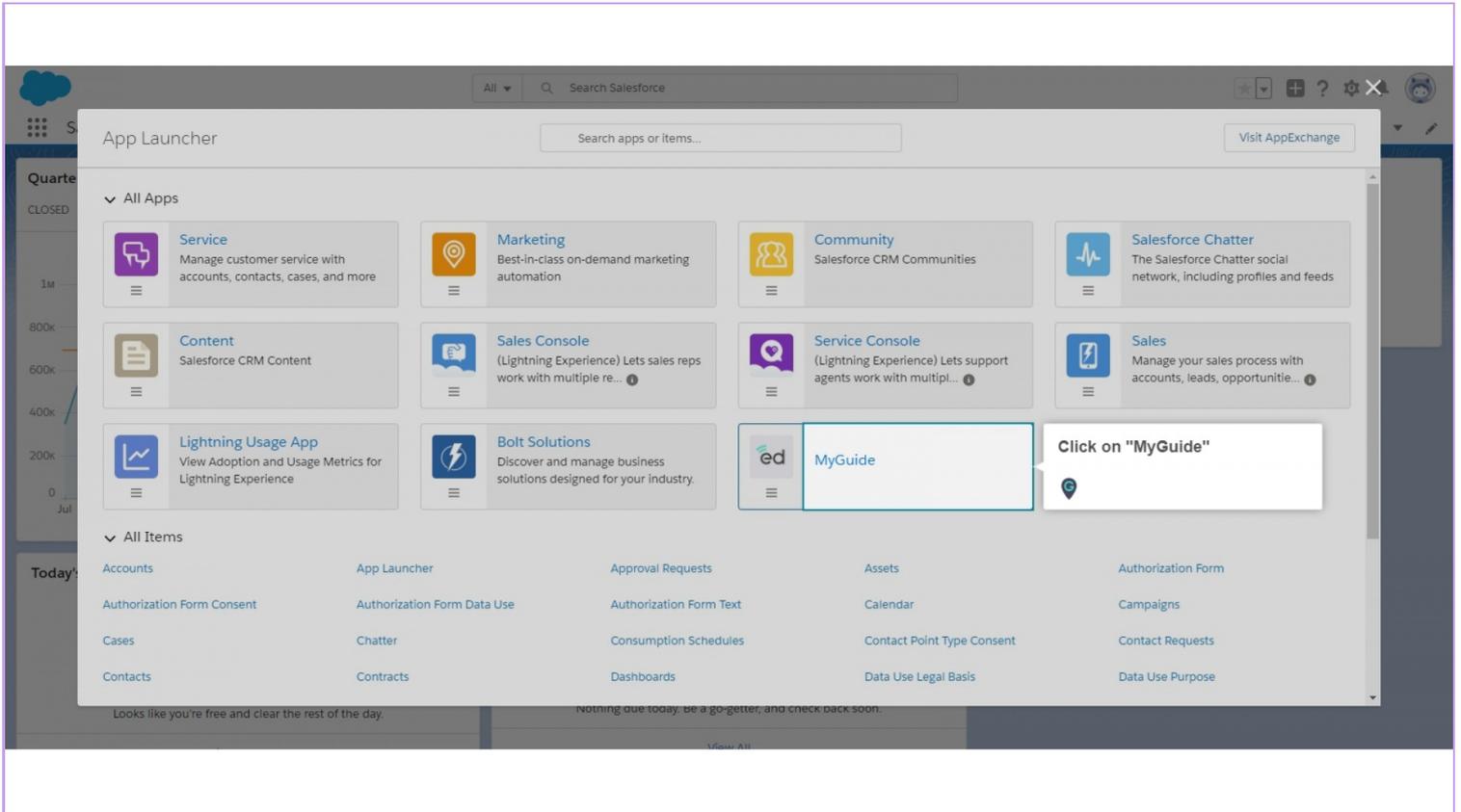
Step: 03

Click on App Launcher



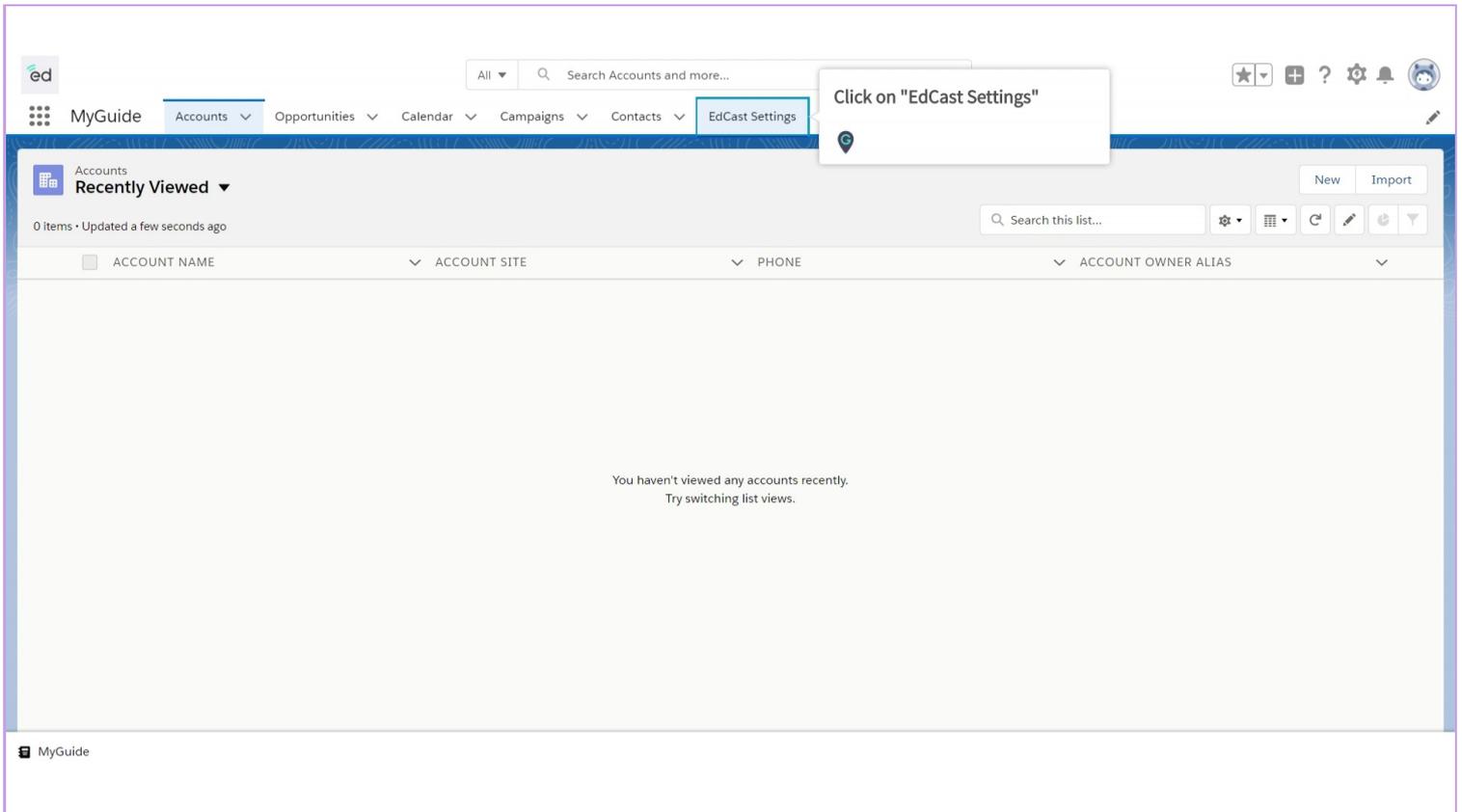
Step: 04

Click on "MyGuide"



Step: 05

Click on "EdCast Settings"

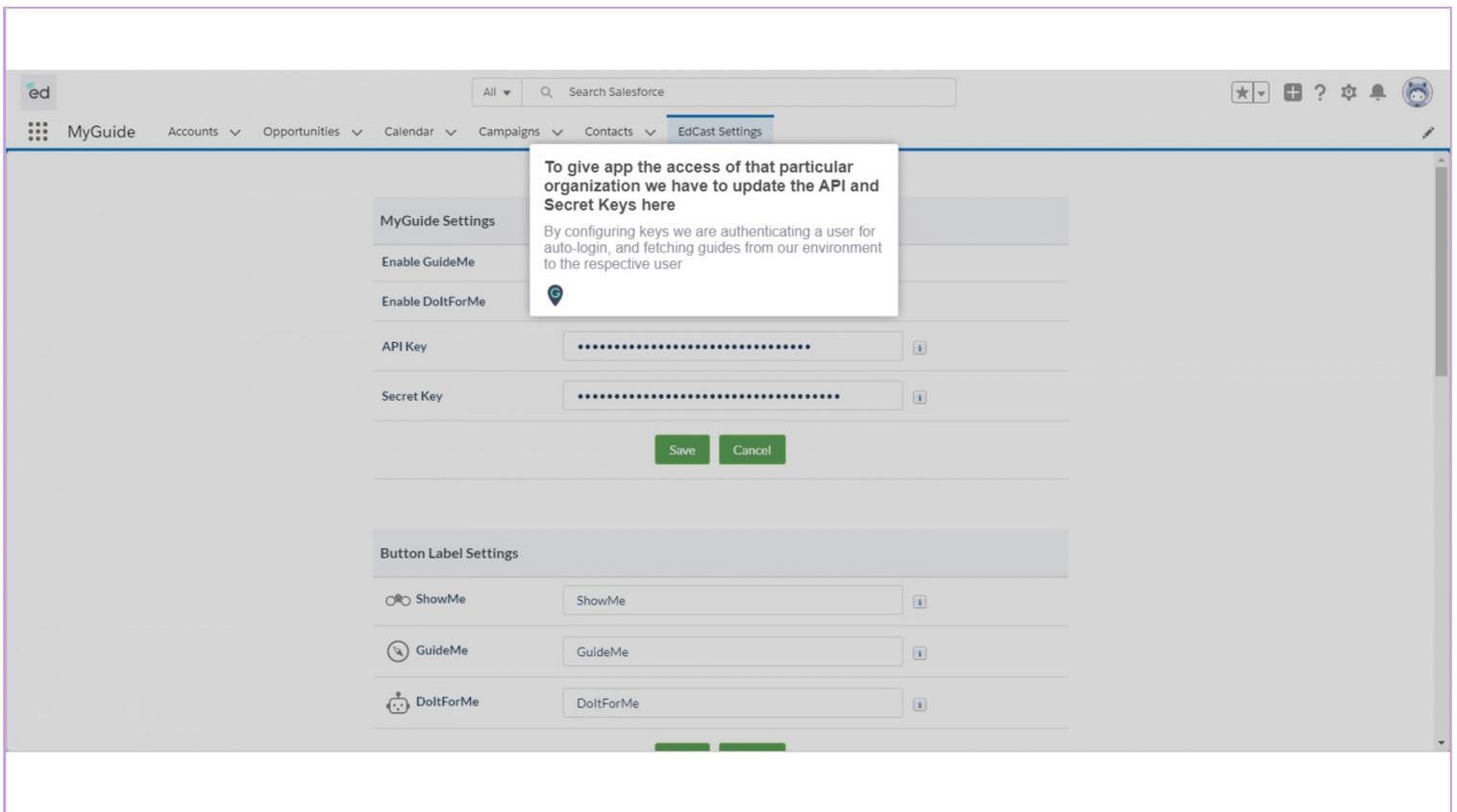


The screenshot displays the MyGuide web application interface. At the top, there is a navigation bar with the 'ed' logo on the left and a search bar labeled 'Search Accounts and more...'. Below the search bar, a horizontal menu contains several options: 'MyGuide', 'Accounts', 'Opportunities', 'Calendar', 'Campaigns', 'Contacts', and 'EdCast Settings'. The 'EdCast Settings' option is highlighted with a blue border. A white callout box with a location pin icon and the text 'Click on "EdCast Settings"' points to this menu item. To the right of the navigation bar are several utility icons: a star, a plus sign, a question mark, a gear, a bell, and a user profile icon. Below the navigation bar, the main content area is titled 'Accounts' and 'Recently Viewed'. It shows '0 Items • Updated a few seconds ago' and a search bar for the list. Below this is a table header with columns: 'ACCOUNT NAME', 'ACCOUNT SITE', 'PHONE', and 'ACCOUNT OWNER ALIAS'. The table body is empty, displaying the message: 'You haven't viewed any accounts recently. Try switching list views.' At the bottom left of the page, the 'MyGuide' logo is visible.

Step: 06

To give app the access of that particular organization we have to update the API and Secret Keys here

By configuring keys we are authenticating a user for auto-login, and fetching guides from our environment to the respective user



The screenshot shows the Salesforce MyGuide settings page. A modal dialog is open in the center, containing the following text:

To give app the access of that particular organization we have to update the API and Secret Keys here

By configuring keys we are authenticating a user for auto-login, and fetching guides from our environment to the respective user

The background settings page includes the following sections:

- MyGuide Settings**
 - Enable GuideMe
 - Enable DoltForMe
 - API Key: [Redacted]
 - Secret Key: [Redacted]
 - Buttons: Save, Cancel
- Button Label Settings**
 - ShowMe: ShowMe
 - GuideMe: GuideMe
 - DoltForMe: DoltForMe

Step: 07

Copy these keys from your Admin section

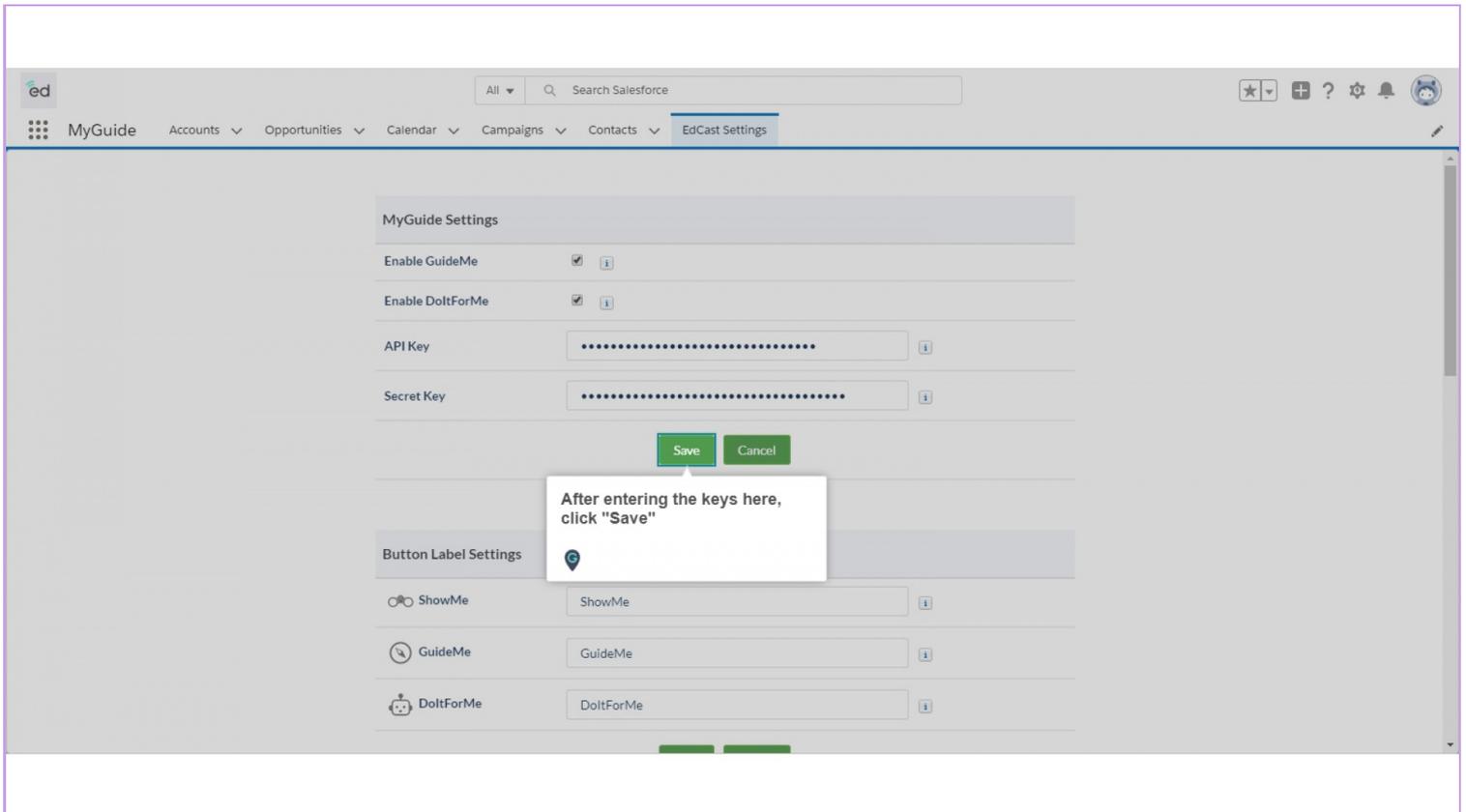
The screenshot shows the myGuide Admin interface. On the left is a navigation menu with options: Home, Organizations, Applications, Users, and Domains. The main content area is titled 'APIs & Services' and features a card for 'SFDC-Training' with a logo and the text 'SFDC-Training'. Below this is a table of API keys. A red box highlights the first row of the table, which contains the following data:

SR. NO.	KEY TYPE	KEY	SECRET	EXPIRATION DATE	ACTION
1	server	bb364ac1408f190e532704e58072b26b	7E90CC54-E99F-4F52-9838-B177BC883401	September 2018	[Copy] [Delete] [Refresh] [Back]

A callout box with a location pin icon and the text 'Copy these keys from your Admin section' is overlaid on the table. At the bottom of the page, there is a footer with the text 'Copyright © 2019 - MyGuide by EdCast' and 'Need any help, please mail us at support@edcast.com'.

Step: 08

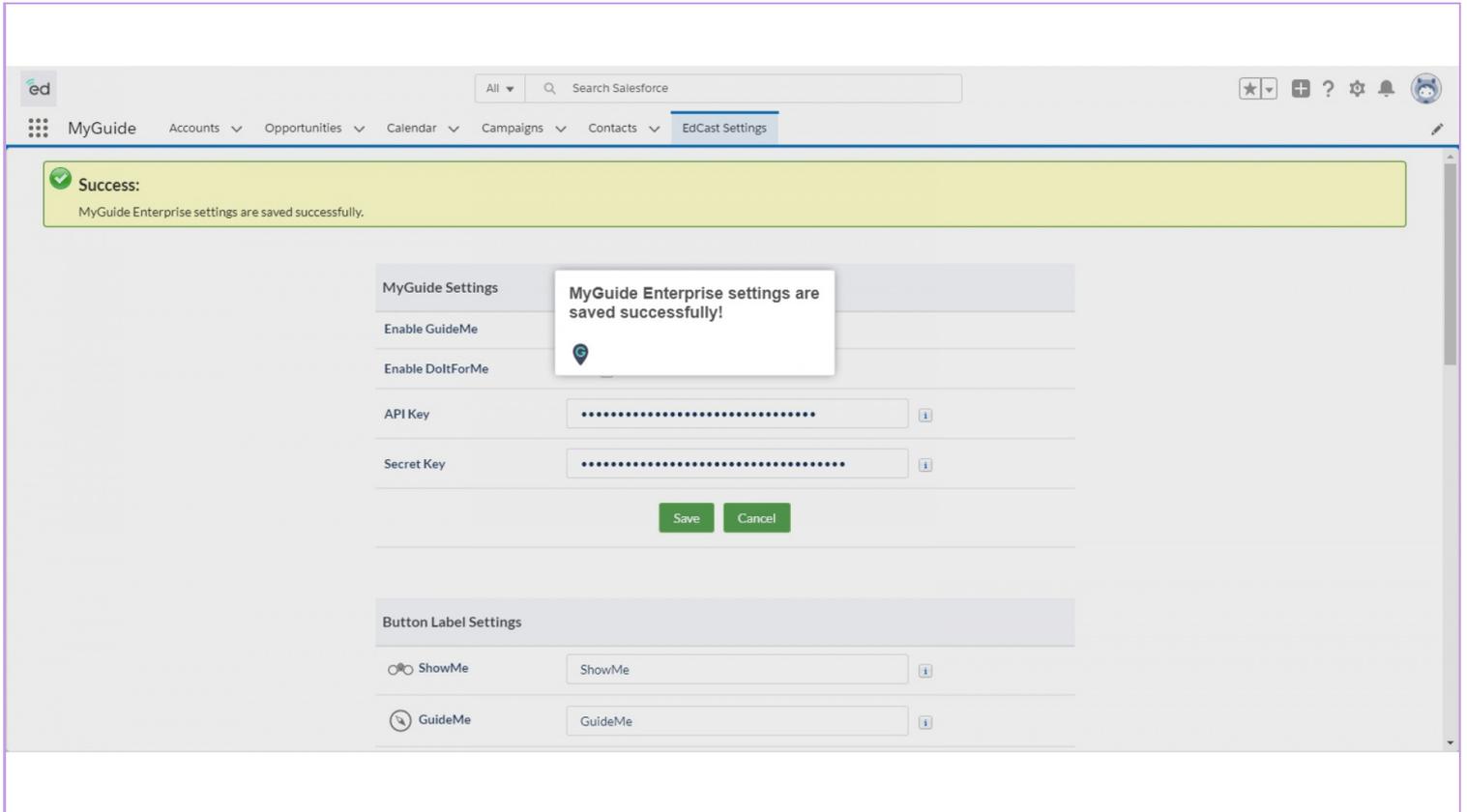
After entering the keys here, click "Save"



The screenshot shows the Salesforce MyGuide settings page. The top navigation bar includes the Salesforce logo, a search bar, and various menu items like MyGuide, Accounts, Opportunities, Calendar, Campaigns, and Contacts. The 'EdCast Settings' tab is active. The main content area is divided into two sections: 'MyGuide Settings' and 'Button Label Settings'. In the 'MyGuide Settings' section, there are four rows: 'Enable GuideMe' (checked), 'Enable DoltForMe' (checked), 'API Key' (masked with dots), and 'Secret Key' (masked with dots). Below these are 'Save' and 'Cancel' buttons. A white callout box with a blue location pin icon points to the 'Save' button, containing the text: 'After entering the keys here, click "Save"'. The 'Button Label Settings' section below has three rows: 'ShowMe' (label: ShowMe), 'GuideMe' (label: GuideMe), and 'DoltForMe' (label: DoltForMe), each with an information icon.

Step: 09

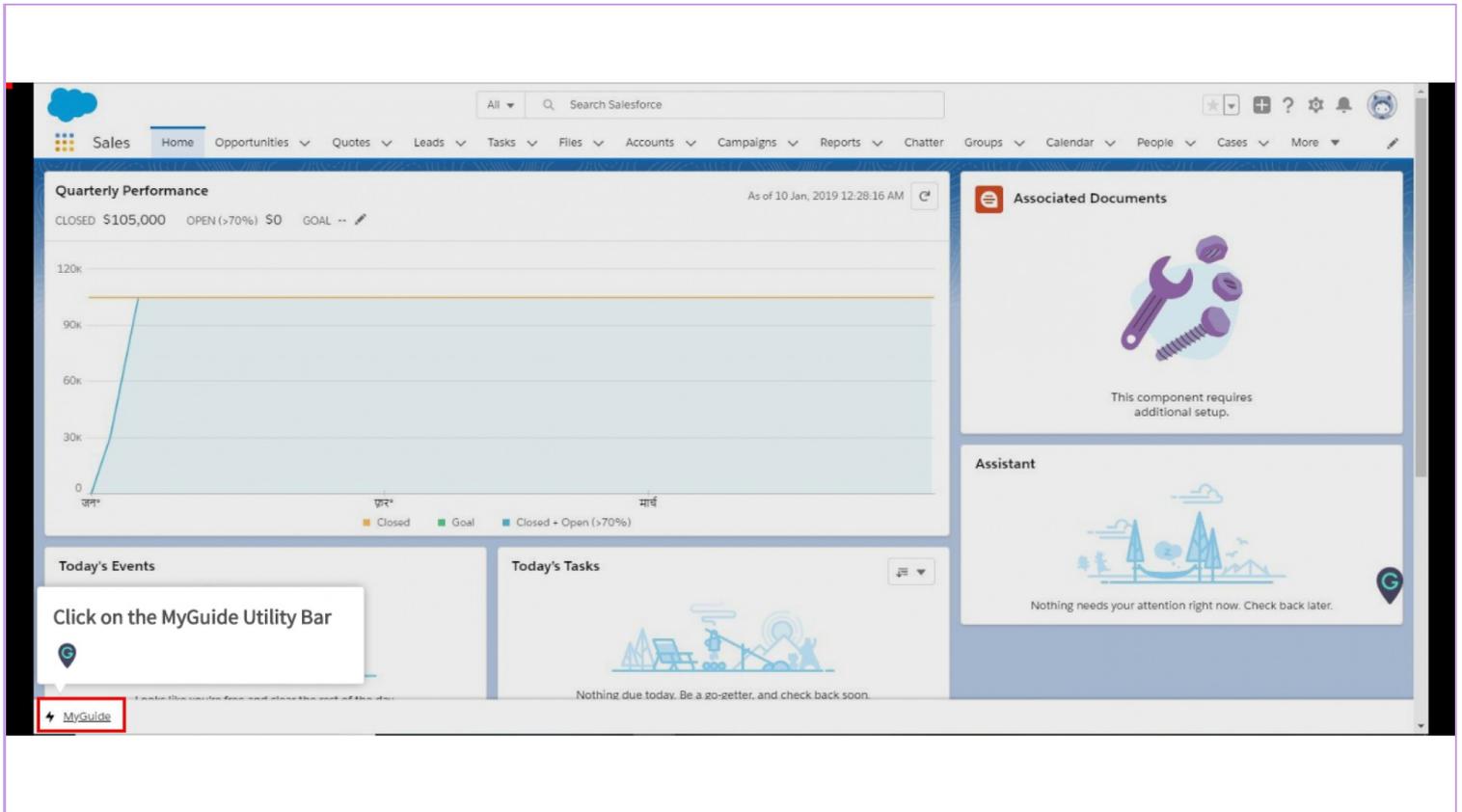
MyGuide Enterprise settings are saved successfully!



The screenshot displays the MyGuide Enterprise settings interface within a Salesforce environment. At the top, the navigation bar includes the MyGuide logo and menu items for Accounts, Opportunities, Calendar, Campaigns, Contacts, and EdCast Settings. A search bar for Salesforce is also visible. A yellow success banner at the top of the settings page reads: "Success: MyGuide Enterprise settings are saved successfully." A white confirmation dialog box is centered on the screen, containing the text "MyGuide Enterprise settings are saved successfully!" and a location pin icon. Below the dialog, the settings are organized into sections: "MyGuide Settings" with options for "Enable GuideMe", "Enable DoltForMe", "API Key", and "Secret Key" (all masked with dots); and "Button Label Settings" with radio buttons for "ShowMe" and "GuideMe", each with a corresponding text input field. "Save" and "Cancel" buttons are located between the two sections.

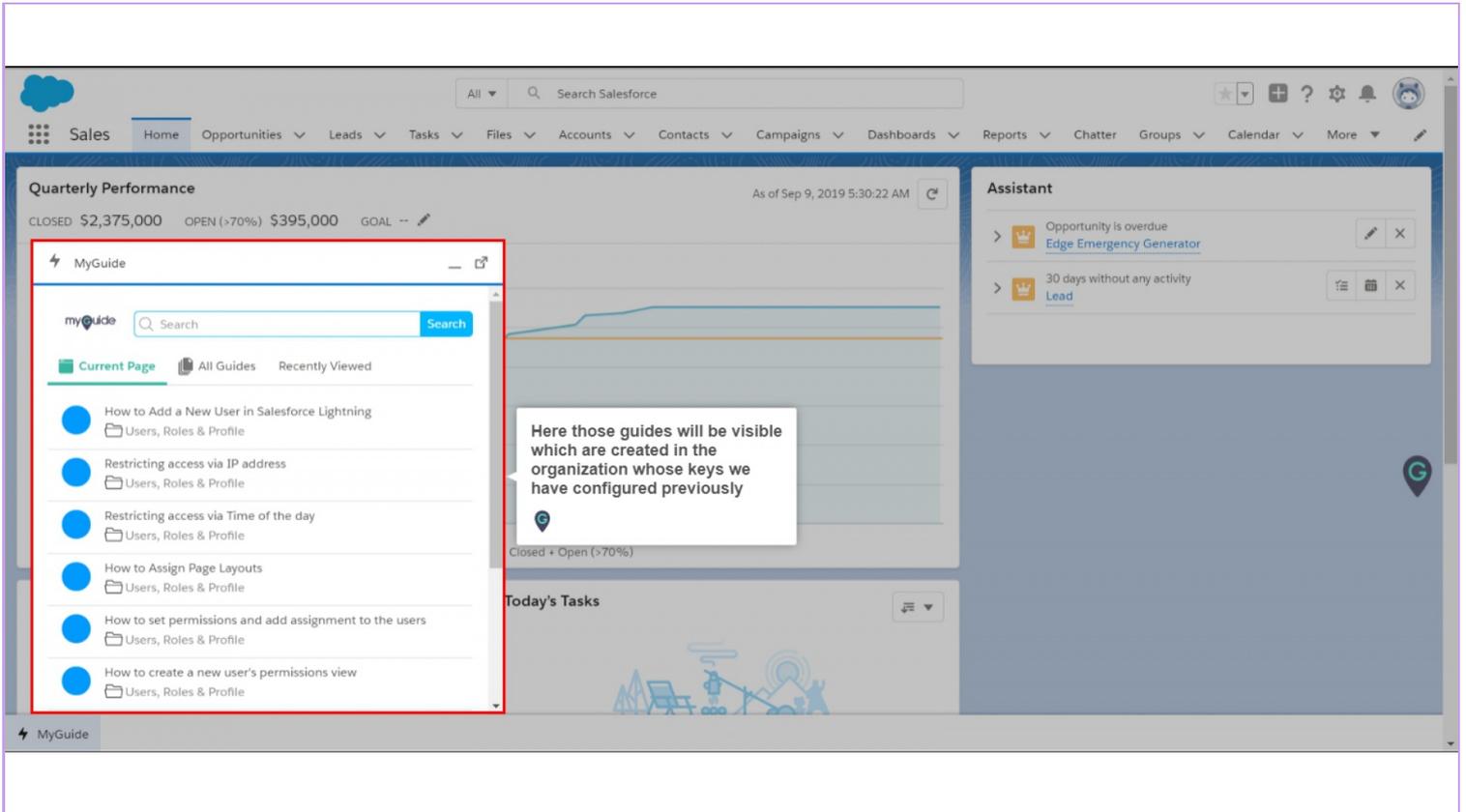
Step: 10

Click on the MyGuide Utility Bar



Step: 11

Here those guides will be visible which are created in the organization whose keys we have configured previously



Step: 12

As soon as the player will open, it will start showing the same guides as of the SFDC App

Now click the widget icon of MyGuide Chrome Player

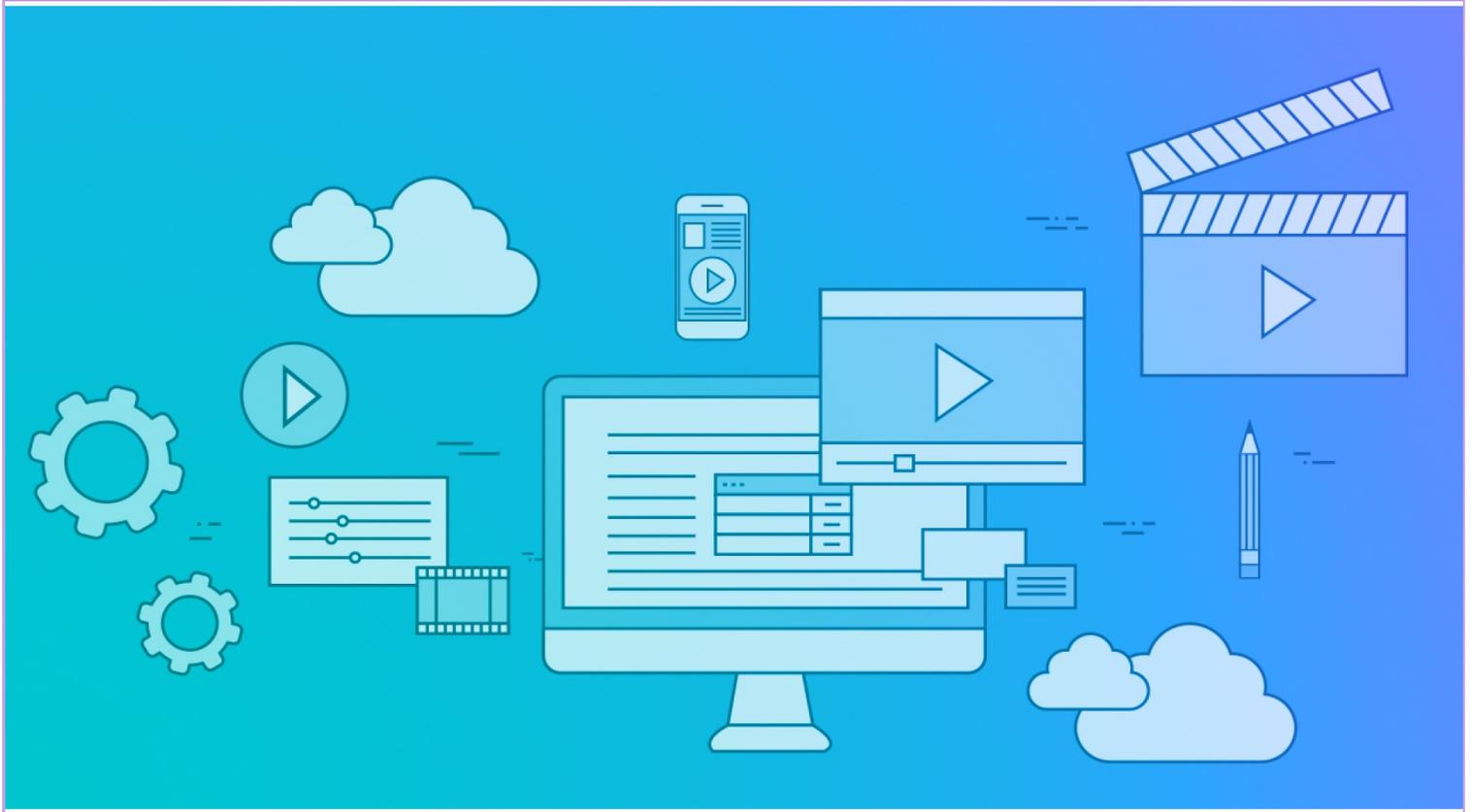
The screenshot shows a Salesforce dashboard interface. At the top, there is a navigation bar with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. A search bar is also present. The main content area is divided into several sections:

- Quarterly Performance:** Displays financial data for 'As of Sep 9, 2019 5:30:22 AM'. It shows 'CLOSED \$2,375,000' and 'OPEN (>70%) \$395,000'. A line chart shows performance trends, with a callout box stating: "As soon as the player will open, it will start showing the same guides as of the SFDC App".
- MyGuide Widget:** A sidebar widget titled 'MyGuide' with a search bar and a list of guides under 'Current Page'. The guides include:
 - How to Add a New User in Salesforce Lightning (Users, Roles & Profile)
 - Restricting access via IP address (Users, Roles & Profile)
 - Restricting access via Time of the day (Users, Roles & Profile)
 - How to Assign Page Layouts (Users, Roles & Profile)
 - How to set permissions and add assignment to the users (Users, Roles & Profile)
 - How to create a new user's permissions view (Users, Roles & Profile)
- Assistant:** A panel on the right showing alerts like 'Opportunity is overdue Edge Emergency Generator' and '30 days without any activity Lead'.
- Today's Tasks:** A section at the bottom of the dashboard.

A red box highlights a location pin icon in the bottom right corner of the dashboard, with a callout box that says: "Now click the widget icon of MyGuide Chrome Player".

Step: 13

Preview of Auto login via SFDC App



Thank You!

myguide.org