



How to enable and disable In-App and  
Automation modes in Salesforce Lightning App

# Step: 01

## Welcome!

In this guide, we will learn how to enable and disable In-App and Automation modes in Salesforce Lightning App

The screenshot displays the Salesforce Lightning App dashboard. A central tooltip titled "Welcome!" contains the text: "In this guide, we will learn how to enable and disable In-App and Automation modes in Salesforce Lightning App". The dashboard includes a "Quarterly Performance" chart showing sales from July to September, with a goal line and a "Closed + Open (>70%)" line. The chart data is as follows:

Month	Closed	Goal	Closed + Open (>70%)
Jul	~0.2M	~2.4M	~0.2M
Aug	~1.2M	~2.4M	~1.2M
Sep	~2.4M	~2.4M	~2.4M

The dashboard also features "Today's Events", "Today's Tasks", and an "Assistant" panel with notifications such as "Opportunity is overdue Edge Emergency Generator" and "30 days without any activity Lead". The MyGuide logo is visible in the bottom left corner.

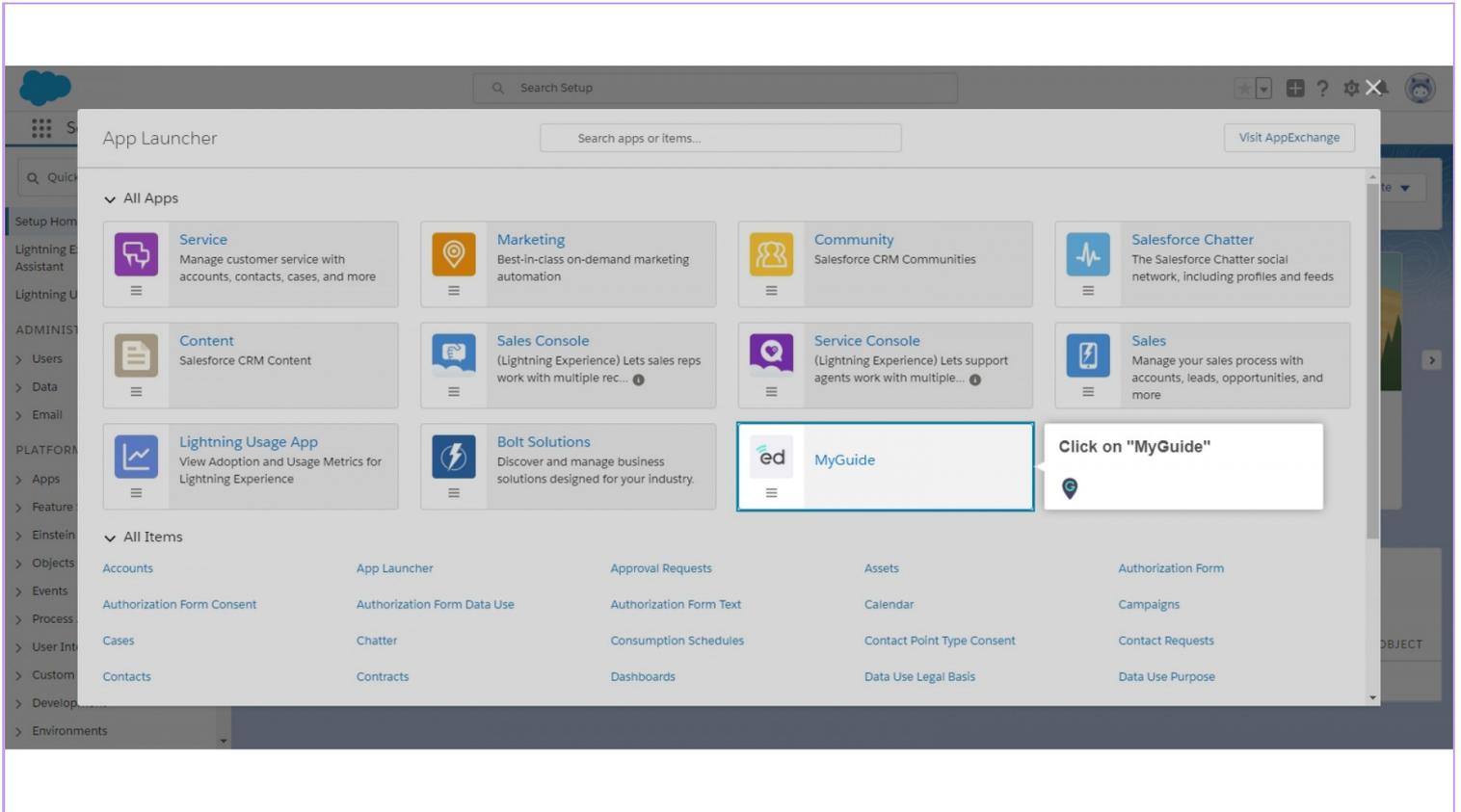
## Step: 02

Click on "App Launcher" icon

The screenshot shows the Salesforce dashboard interface. At the top left, there is a callout box with the text "Click on 'App Launcher' icon" pointing to the App Launcher icon (a grid of colored squares). The dashboard includes a navigation bar with various menu items like "Tasks", "Files", "Accounts", "Contacts", "Campaigns", "Dashboards", "Reports", "Chatter", "Groups", and "Calendar". The main content area features a "Quarterly Performance" chart showing sales trends from July to September, with a goal line and a legend for "Closed", "Goal", and "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 two notifications: "Opportunity is overdue Edge Emergency Generator" and "30 days without any activity Lead". The bottom left corner shows a "MyGuide" logo.

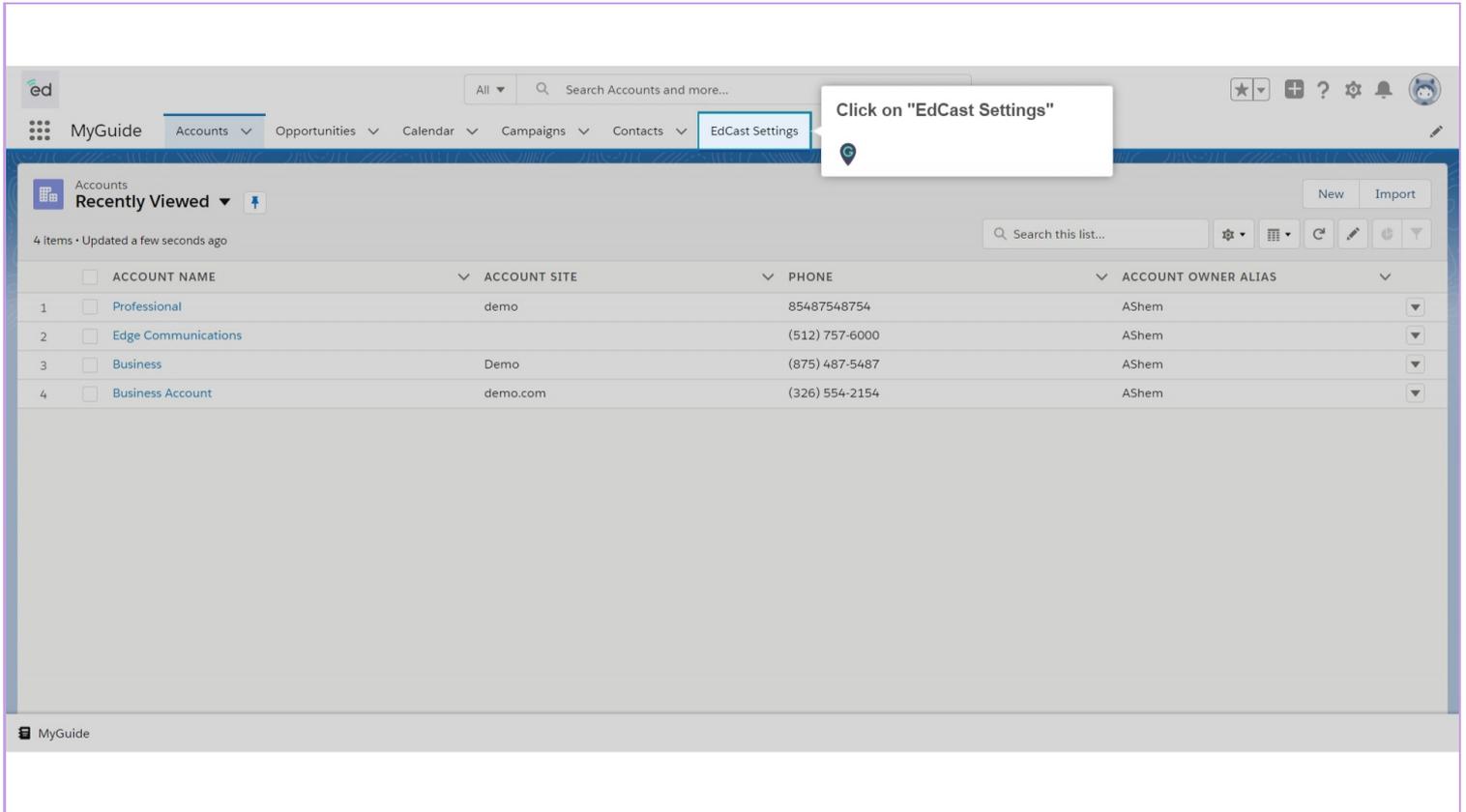
# Step: 03

## Click on "MyGuide"



## Step: 04

Click on "EdCast Settings"



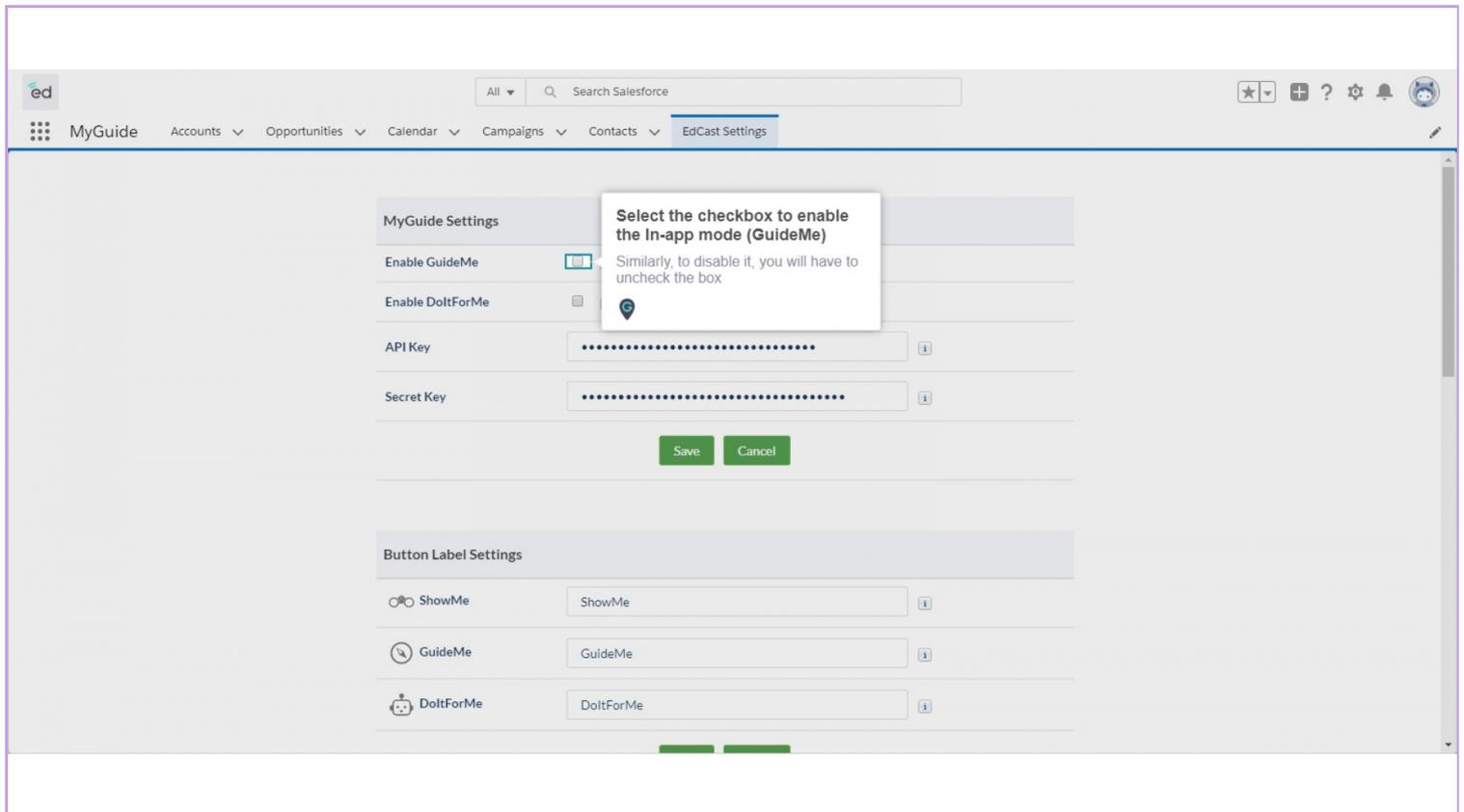
The screenshot shows the MyGuide web application interface. At the top, there is a navigation bar with the 'ed' logo, a search bar, and several menu items: 'MyGuide', 'Accounts', 'Opportunities', 'Calendar', 'Campaigns', 'Contacts', and 'EdCast Settings'. A callout box with a location pin icon points to the 'EdCast Settings' menu item, containing the text 'Click on "EdCast Settings"'. Below the navigation bar, the 'Accounts' section is active, showing a 'Recently Viewed' list of 4 items. The table below lists the accounts with columns for ACCOUNT NAME, ACCOUNT SITE, PHONE, and ACCOUNT OWNER ALIAS.

	ACCOUNT NAME	ACCOUNT SITE	PHONE	ACCOUNT OWNER ALIAS
1	Professional	demo	85487548754	AShem
2	Edge Communications		(512) 757-6000	AShem
3	Business	Demo	(875) 487-5487	AShem
4	Business Account	demo.com	(326) 554-2154	AShem

## Step: 05

# Select the checkbox to enable the In-app mode (GuideMe)

Similarly, to disable it, you will have to uncheck the box



The screenshot displays the Salesforce MyGuide settings interface. The top navigation bar includes the 'ed' logo, a search bar, and various utility icons. The main menu shows 'MyGuide' as the active section, with sub-menus for 'Accounts', 'Opportunities', 'Calendar', 'Campaigns', 'Contacts', and 'EdCast Settings'. The 'MyGuide Settings' section is expanded, showing the following options:

- Enable GuideMe:** A checkbox that is currently checked. A tooltip points to this checkbox with the text: "Select the checkbox to enable the In-app mode (GuideMe). Similarly, to disable it, you will have to uncheck the box".
- Enable DoltForMe:** A checkbox that is currently unchecked.
- API Key:** A text field containing a masked key (dots).
- Secret Key:** A text field containing a masked key (dots).

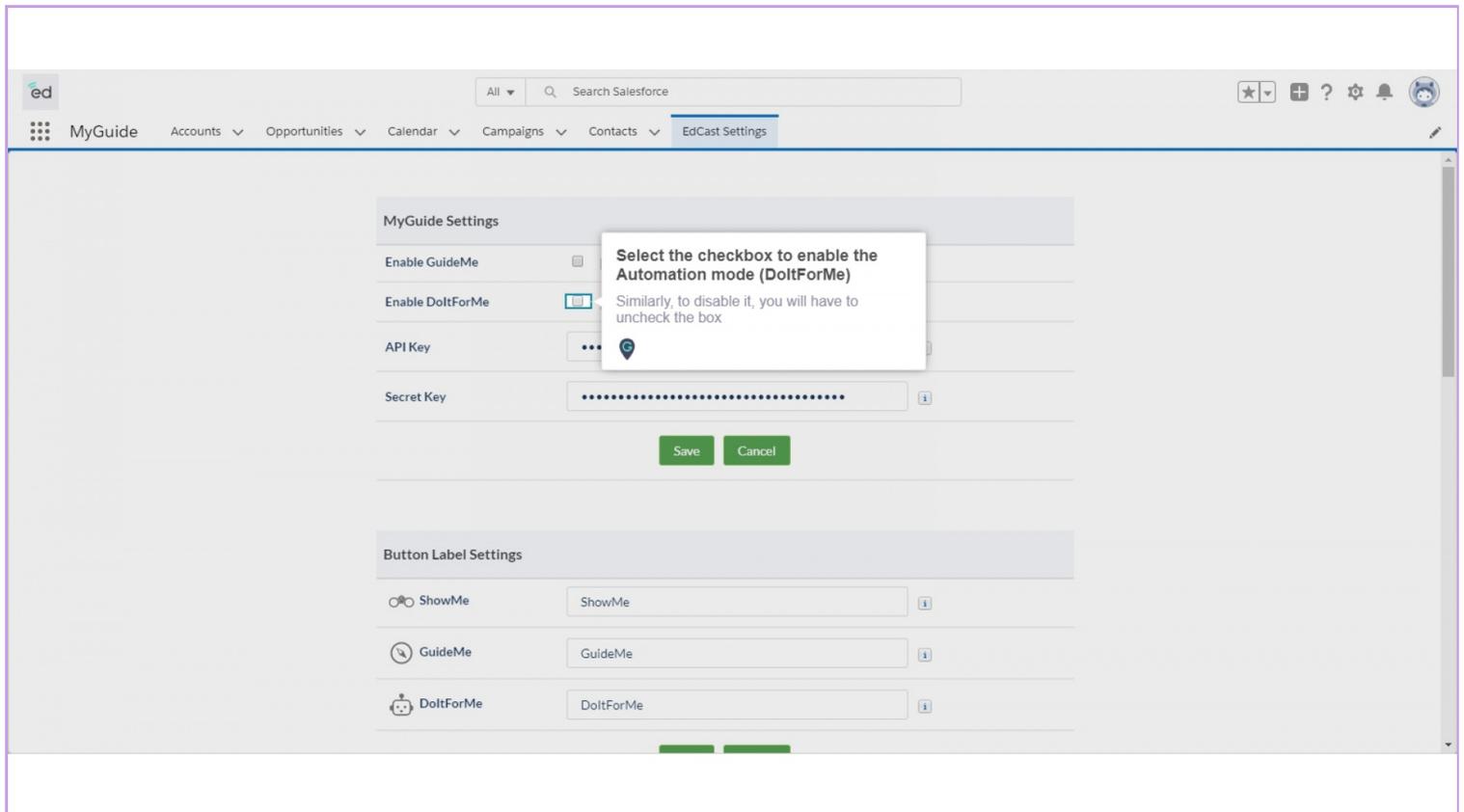
Below these settings are two green buttons: 'Save' and 'Cancel'. The 'Button Label Settings' section is also visible, showing three rows:

- ShowMe:** A text field with the value 'ShowMe'.
- GuideMe:** A text field with the value 'GuideMe'.
- DoltForMe:** A text field with the value 'DoltForMe'.

## Step: 06

# Select the checkbox to enable the Automation mode (DoltForMe)

Similarly, to disable it, you will have to uncheck the box



The screenshot displays the Salesforce MyGuide settings interface. The top navigation bar includes the 'ed' logo, a search bar, and various utility icons. The main menu shows 'MyGuide' and several sub-menus: 'Accounts', 'Opportunities', 'Calendar', 'Campaigns', 'Contacts', and 'EdCast Settings'. The 'EdCast Settings' section is active, showing 'MyGuide Settings' with the following options:

- Enable GuideMe:
- Enable DoltForMe:
- API Key:
- Secret Key:

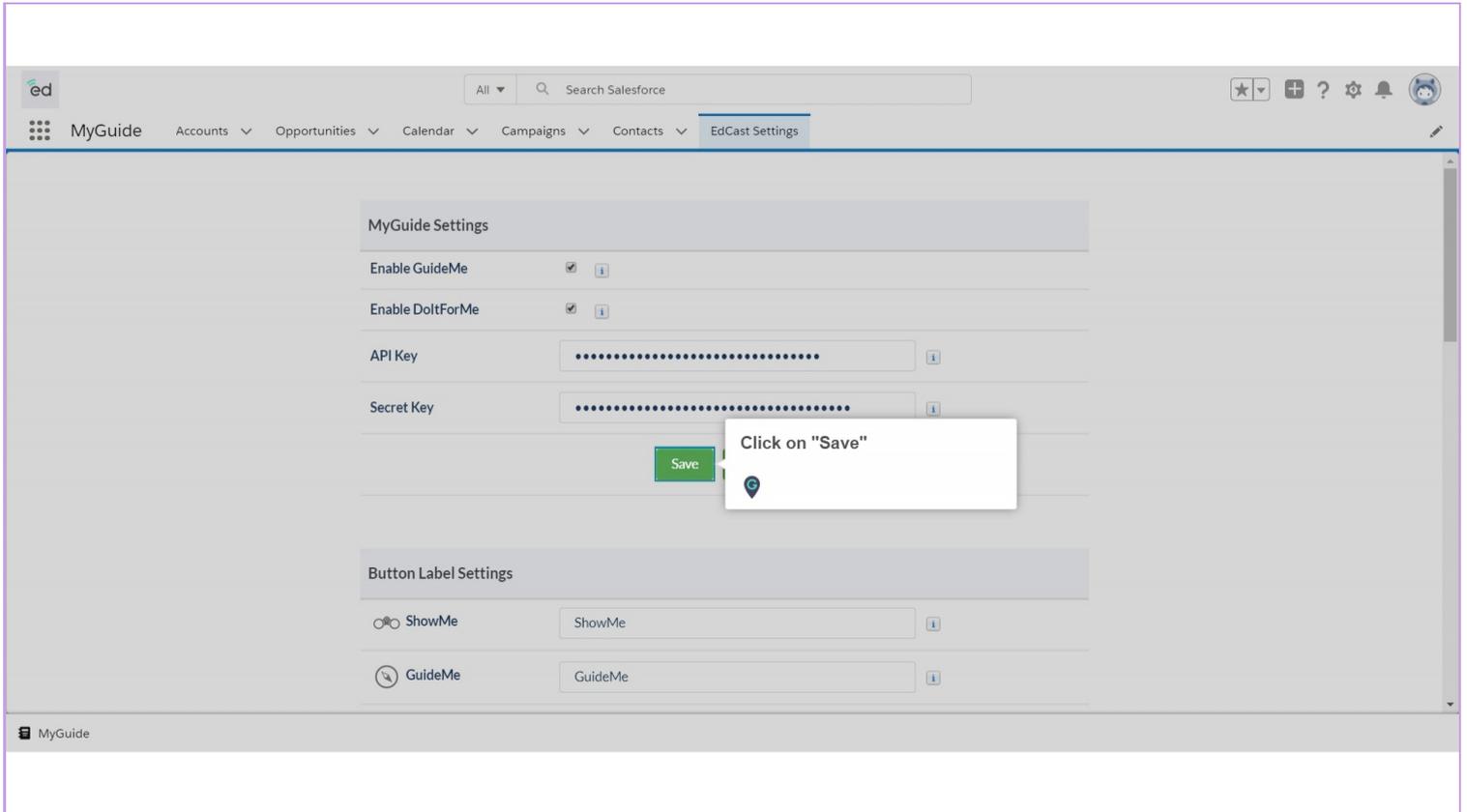
Below these settings are 'Button Label Settings' with three rows:

- ShowMe:
- GuideMe:
- DoltForMe:

A callout box is positioned over the 'Enable DoltForMe' checkbox, containing the text: 'Select the checkbox to enable the Automation mode (DoltForMe)'. Below this text, it says: 'Similarly, to disable it, you will have to uncheck the box'. At the bottom of the settings section, there are 'Save' and 'Cancel' buttons.

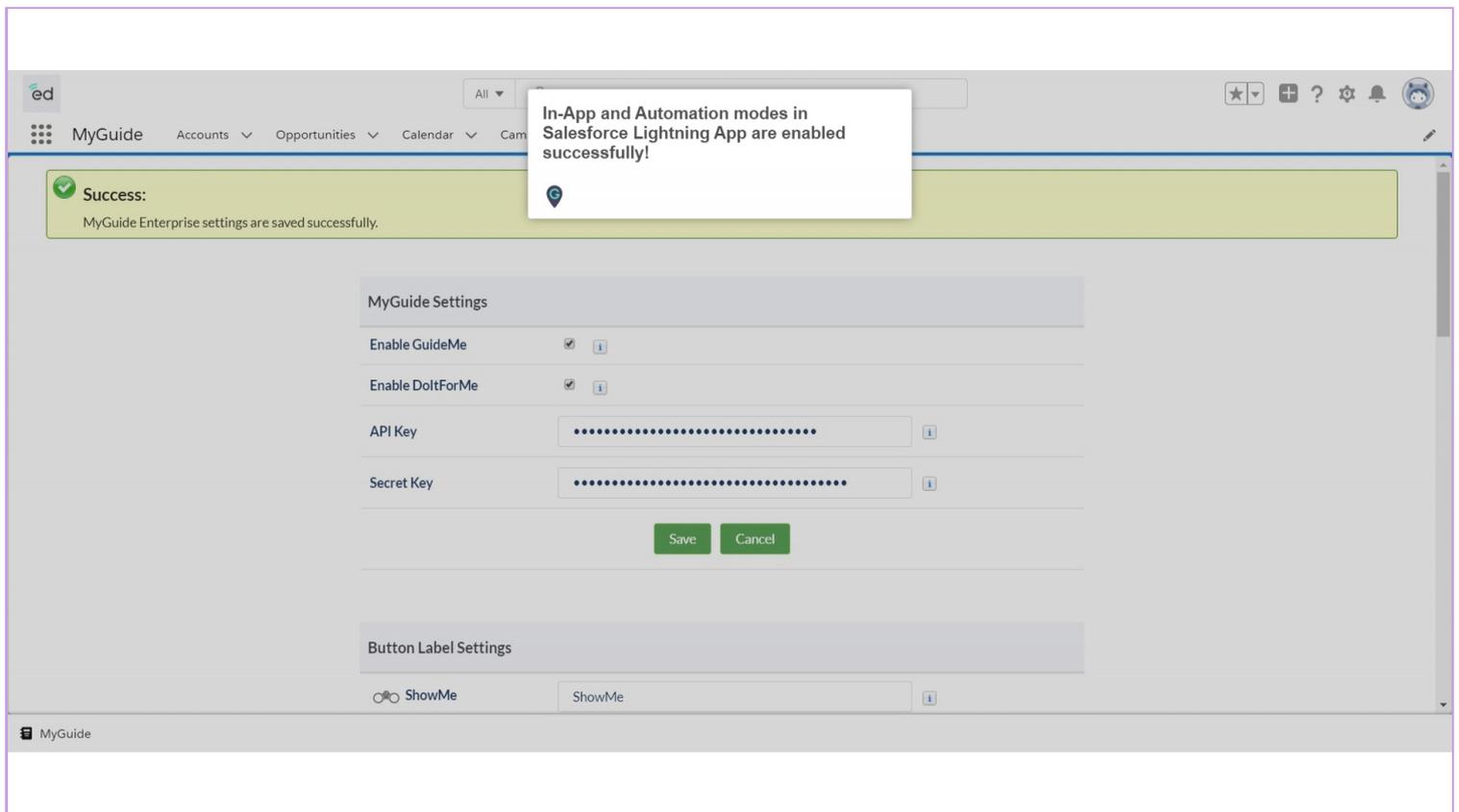
## Step: 07

Click on "Save"



## Step: 08

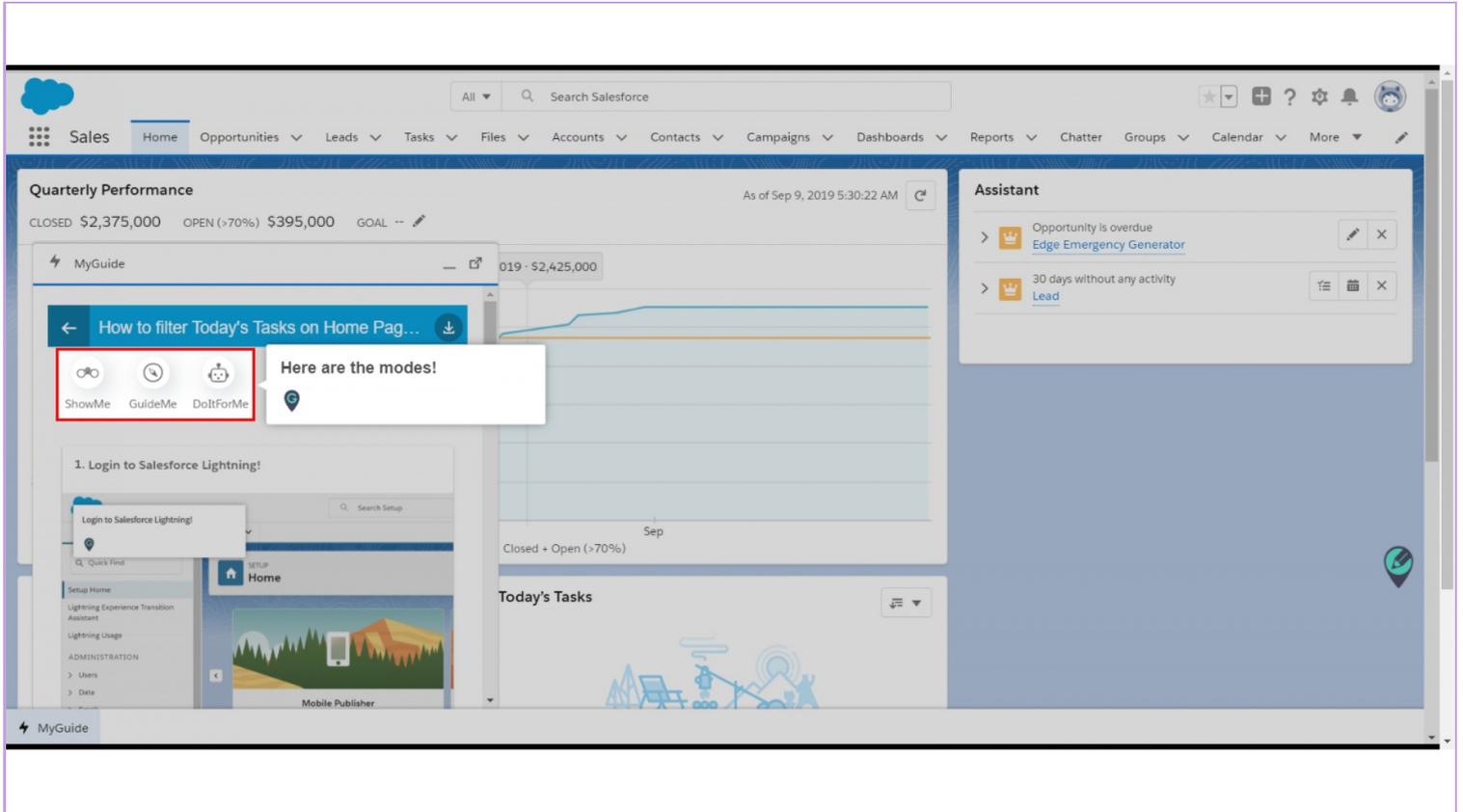
In-App and Automation modes in Salesforce Lightning App are enabled successfully!



The screenshot displays the Salesforce Lightning App settings page for MyGuide. A central white notification box with a location pin icon reads: "In-App and Automation modes in Salesforce Lightning App are enabled successfully!". Below this, a green success message states: "Success: MyGuide Enterprise settings are saved successfully." The settings are organized into sections: "MyGuide Settings" includes "Enable GuideMe" (checked), "Enable DoltForMe" (checked), "API Key" (masked), and "Secret Key" (masked), with "Save" and "Cancel" buttons below. "Button Label Settings" includes a "ShowMe" radio button and a text field containing "ShowMe". The top navigation bar shows "MyGuide" and various menu items like "Accounts", "Opportunities", "Calendar", and "Cam".

# Step: 09

Here are the modes!



# Thank You!

[myguide.org](https://myguide.org)