

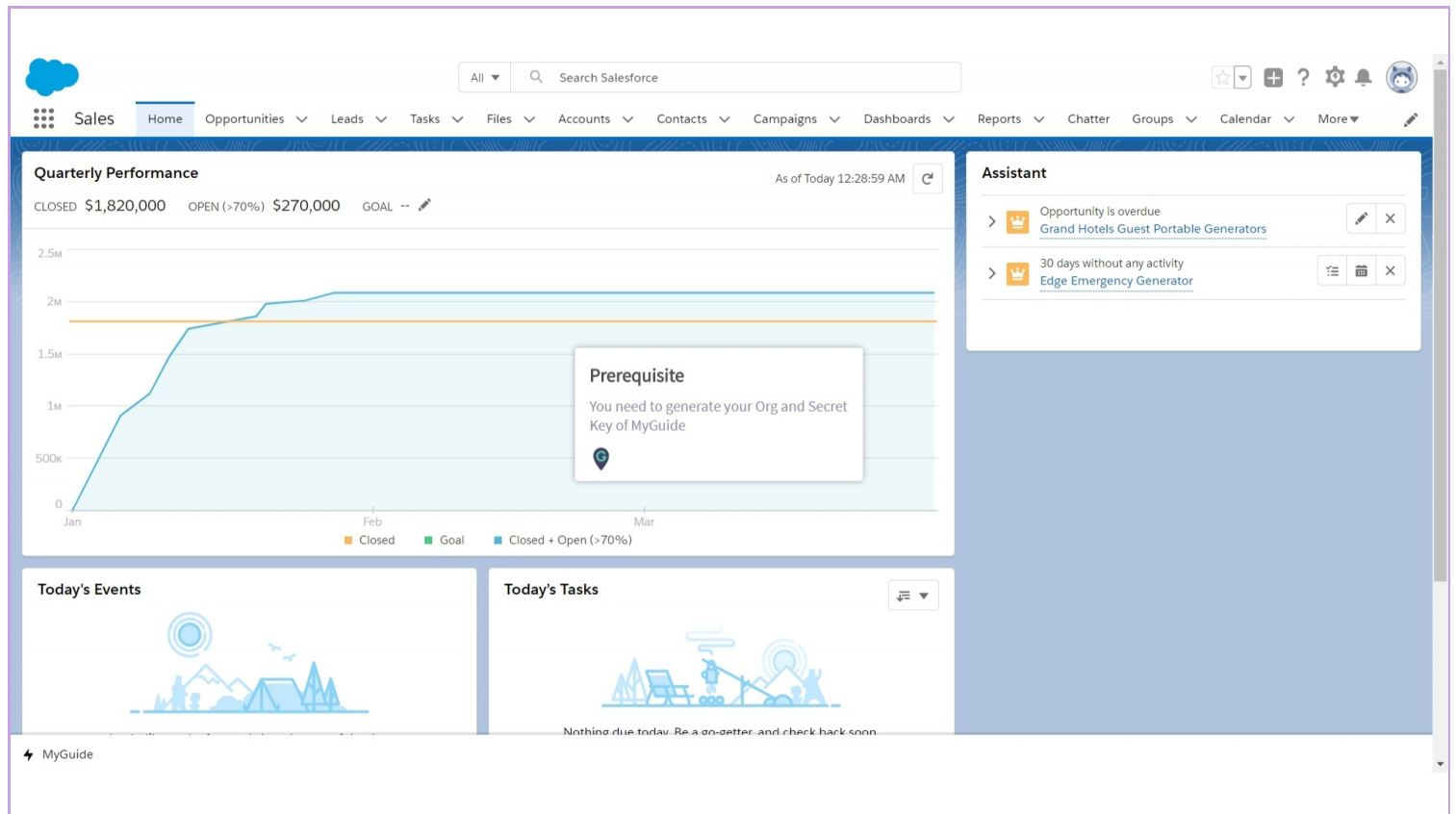


How to update the keys of a MyGuide Account
inside Salesforce Lightning

Step: 01

Prerequisite

You need to generate your Org and Secret Key of MyGuide



Step: 02

Click on App Launcher

The screenshot shows the Salesforce dashboard interface. A callout box with the text "Click on App Launcher" points to the App Launcher icon (a grid of colored squares) in the top left corner. The dashboard includes a "Quarterly Performance" chart showing sales data from January to March, with a goal line and a line for "Closed + Open (>70%)". The chart shows a significant increase in sales starting in January, reaching a plateau in February and March. Below the chart are sections for "Today's Events" and "Today's Tasks". On the right side, there is an "Assistant" panel with two items: "Opportunity is overdue" for "Grand Hotels Guest Portable Generators" and "30 days without any activity" for "Edge Emergency Generator". The top navigation bar includes links for Home, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. A search bar is also present.

Click on App Launcher

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.

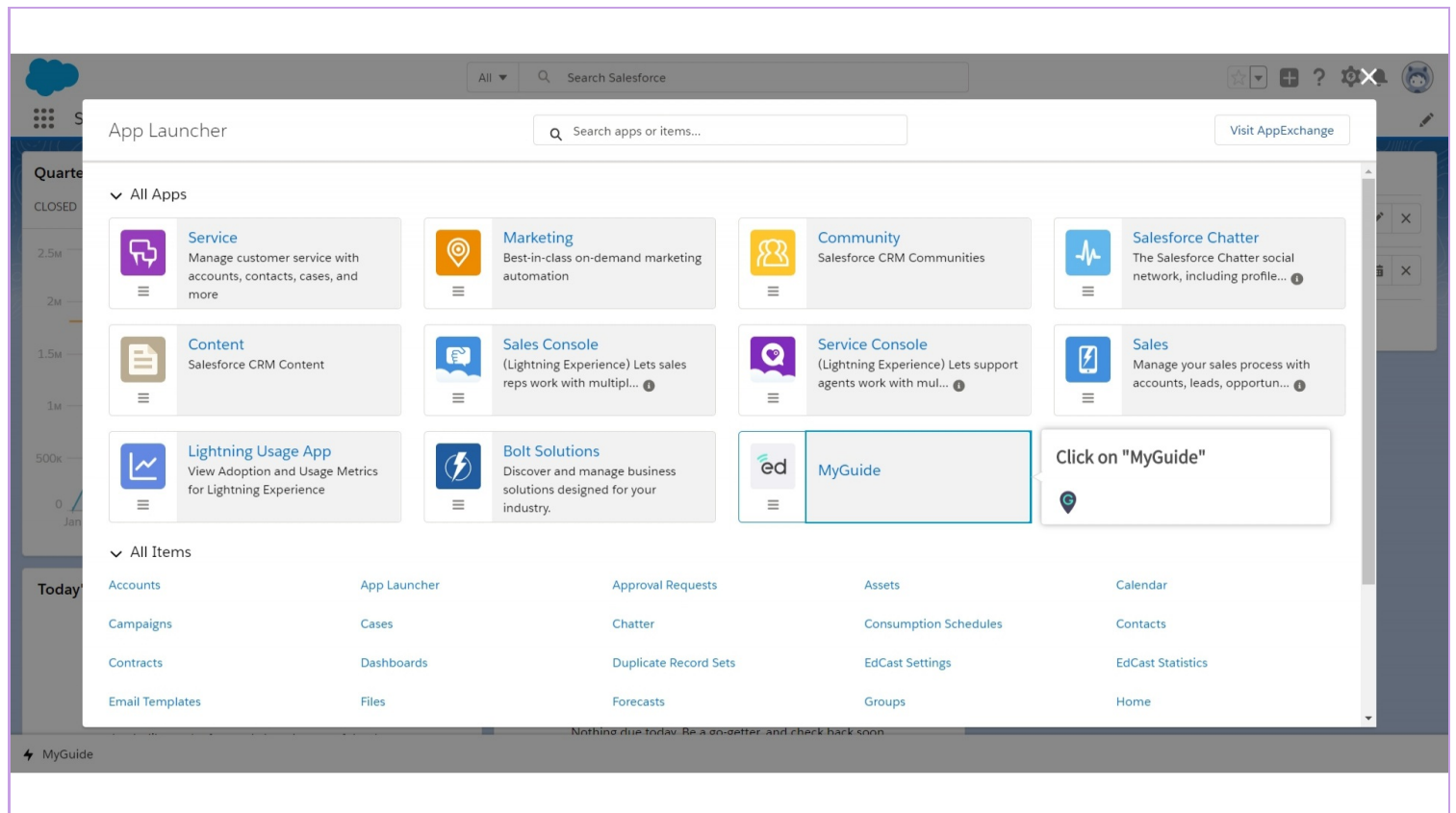
MyGuide

Assistant

- Opportunity is overdue
Grand Hotels Guest Portable Generators
- 30 days without any activity
Edge Emergency Generator

Step: 03

Click on "MyGuide"



Step: 04

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 navigation bar, a menu contains several tabs: 'MyGuide', 'Accounts', 'Opportunities', 'Calendar', 'Campaigns', 'Contacts', and 'EdCast Settings'. The 'EdCast Settings' tab is highlighted with a blue border. A callout box with a location pin icon and the text 'Click on "EdCast Settings"' points to this tab. Below the navigation bar, the main content area is titled 'Accounts' and 'Recently Viewed'. It shows a message: '0 items • Updated a few seconds ago'. Below this, there is a table with columns: 'ACCOUNT NAME', 'ACCOUNT SITE', 'PHONE', and 'ACCOUNT OWNER ALIAS'. The table is currently empty, and a message at the bottom of the table area states: 'You haven't viewed any accounts recently. Try switching list views.' The bottom of the page features a footer with the 'MyGuide' logo and the text 'by edcast'.

Step: 05

Enter "API Key" of MyGuide

ed

All ▾

Search Salesforce

★ ▾

+

?

⚙

🔔

👤

MyGuide

Accounts ▾

Opportunities ▾

Calendar ▾

Campaigns ▾

Contacts ▾

EdCast Settings

MyGuide Settings

Enable GuideMe

☐

i

Enable DoltForMe

☐

i

API Key

Enter "API Key" of MyGuide

📍

Secret Key

i

Save

Cancel

Button Label Settings

ShowMe

i

GuideMe

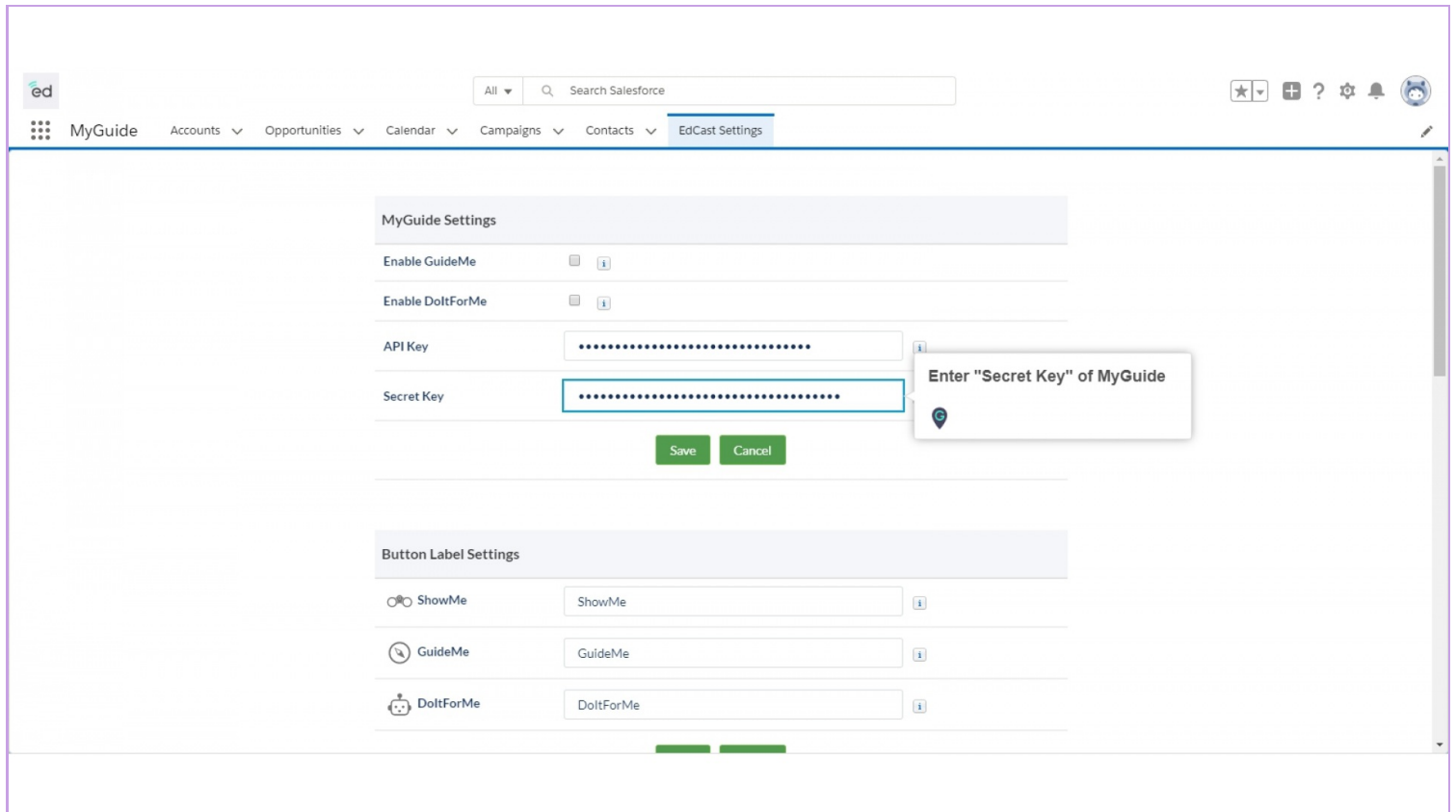
i

DoltForMe

i

Step: 06

Enter "Secret Key" of MyGuide



The screenshot displays the Salesforce interface with the 'MyGuide' app selected in the sidebar. The 'EdCast Settings' tab is active, showing the 'MyGuide Settings' section. In this section, the 'Secret Key' field is highlighted with a blue border, and a tooltip message 'Enter "Secret Key" of MyGuide' is displayed next to it. The 'API Key' field is also visible above it. Below the 'MyGuide Settings' section, the 'Button Label Settings' section is visible, containing three rows: 'ShowMe', 'GuideMe', and 'DoltForMe', each with a corresponding text input field and an information icon. The 'Save' and 'Cancel' buttons are located below the 'Secret Key' field.

MyGuide Settings

Enable GuideMe ☐ ⓘ

Enable DoltForMe ☐ ⓘ

API Key

Secret Key

Save Cancel

Enter "Secret Key" of MyGuide

Button Label Settings

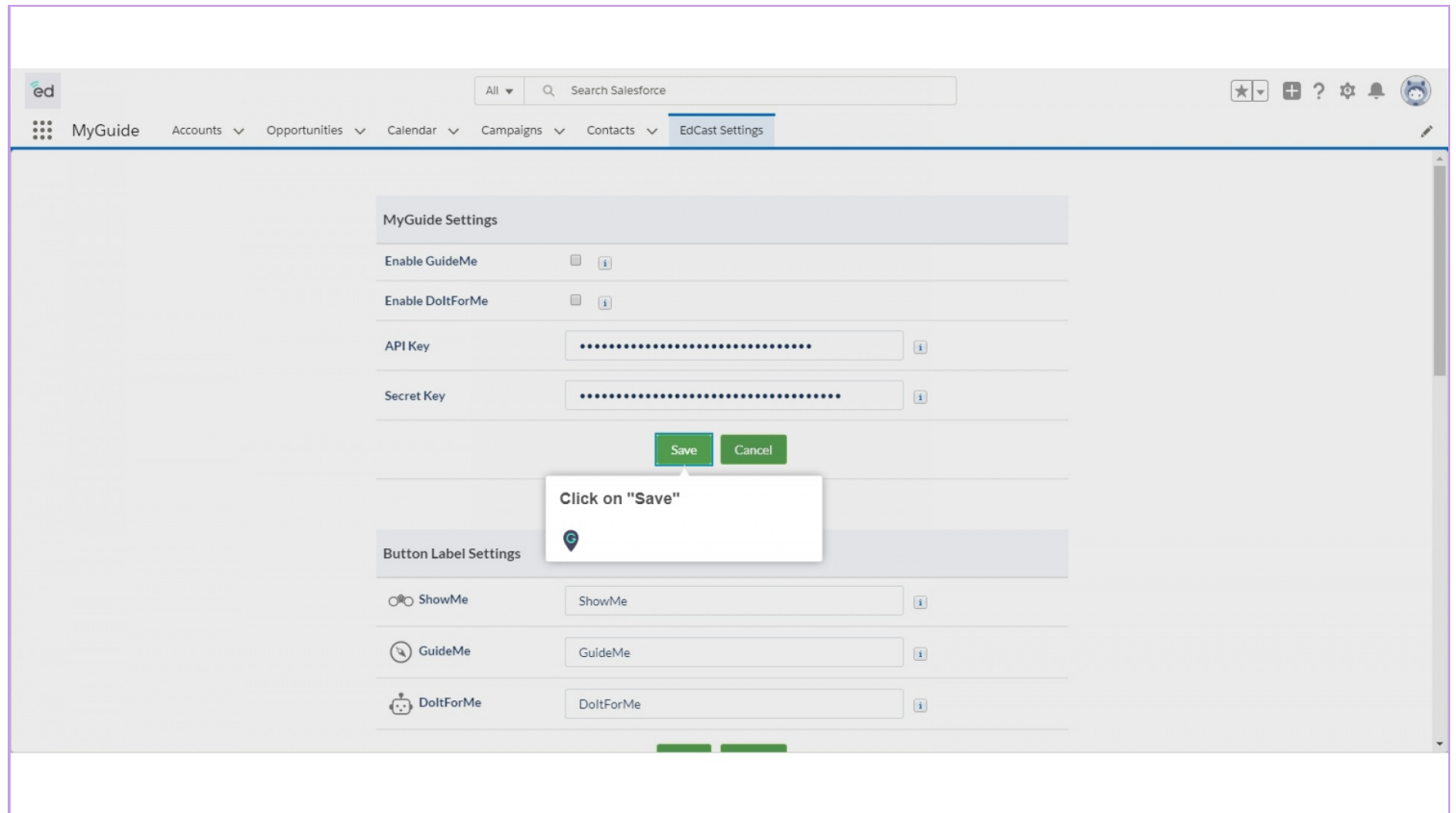
ShowMe ⓘ

GuideMe ⓘ

DoltForMe ⓘ

Step: 07

Click on "Save"



The screenshot displays the Salesforce interface for the 'MyGuide' app. 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-items for 'Accounts', 'Opportunities', 'Calendar', 'Campaigns', 'Contacts', and 'EdCast Settings'. The 'EdCast Settings' sub-menu is currently selected.

The settings page is divided into two main sections: 'MyGuide Settings' and 'Button Label Settings'. The 'MyGuide Settings' section contains four fields: 'Enable GuideMe' (checkbox), 'Enable DoltForMe' (checkbox), 'API Key' (password field), and 'Secret Key' (password field). Below these fields are 'Save' and 'Cancel' buttons. A white callout box with a location pin icon and the text 'Click on "Save"' is positioned over the 'Save' button.

The 'Button Label Settings' section contains three rows, each with a label and a text input field: 'ShowMe' (input: 'ShowMe'), 'GuideMe' (input: 'GuideMe'), and 'DoltForMe' (input: 'DoltForMe').

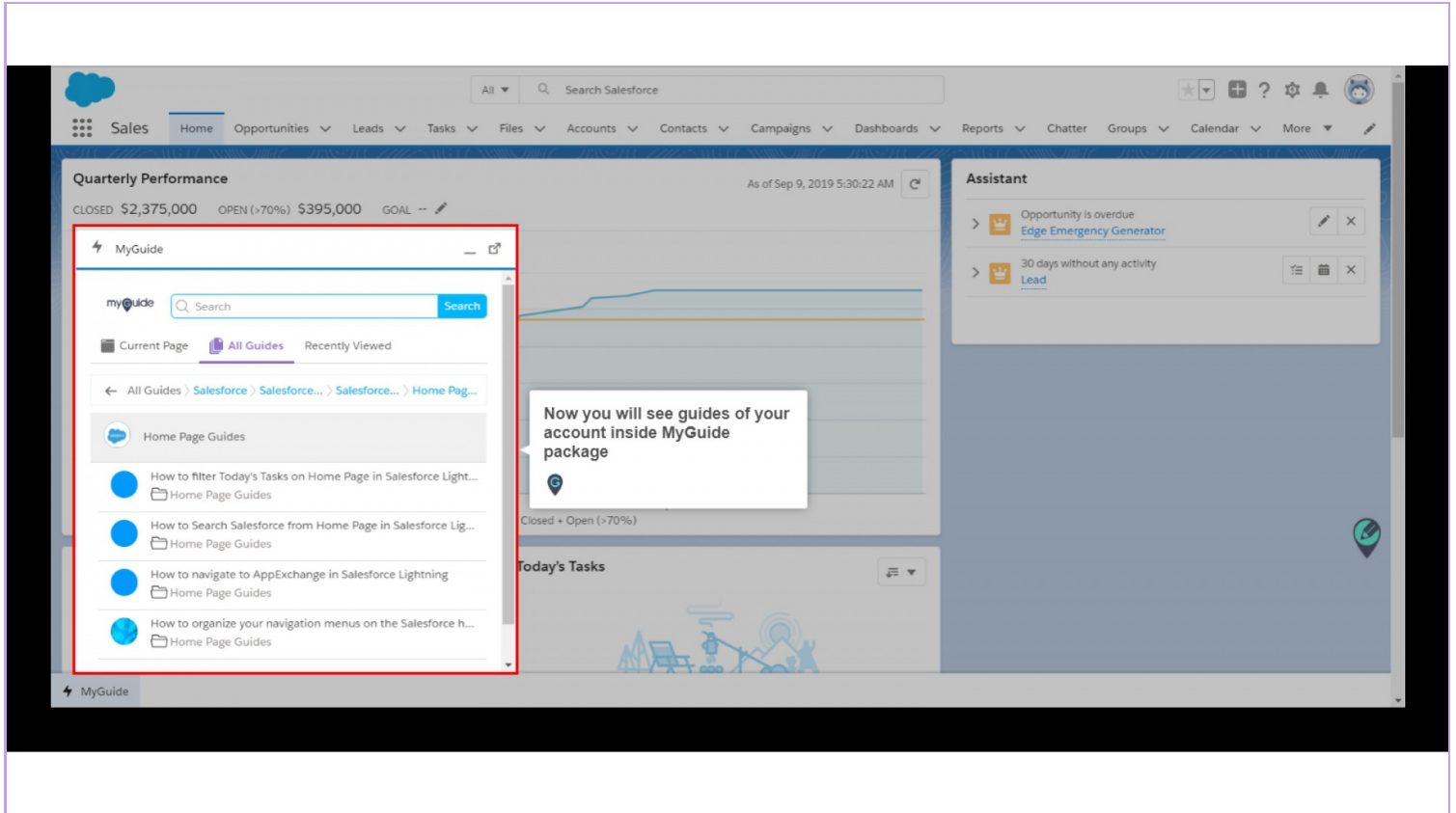
Step: 08

MyGuide Enterprise settings are saved successfully!

The screenshot displays the MyGuide Enterprise settings interface within a Salesforce environment. At the top, a navigation bar includes the Salesforce logo, a search bar, and various utility icons. Below this, a sub-navigation bar shows tabs for 'MyGuide', 'Accounts', 'Opportunities', 'Calendar', 'Campaigns', 'Contacts', and 'EdCast Settings', with 'EdCast Settings' currently selected. A prominent yellow success banner at the top of the main content area reads: 'Success: MyGuide Enterprise settings are saved successfully.' Below this banner, the 'MyGuide Settings' section is visible, featuring a modal dialog box that states: 'MyGuide Enterprise settings are saved successfully!'. The settings form includes fields for 'Enable GuideMe', 'Enable DoltForMe', 'API Key', and 'Secret Key', each with a corresponding 'Save' or 'Cancel' button. The 'Button Label Settings' section at the bottom allows for customizing labels for 'ShowMe' and 'GuideMe' buttons.

Step: 09

Now you will see guides of your account inside MyGuide package



Thank You!

myguide.org