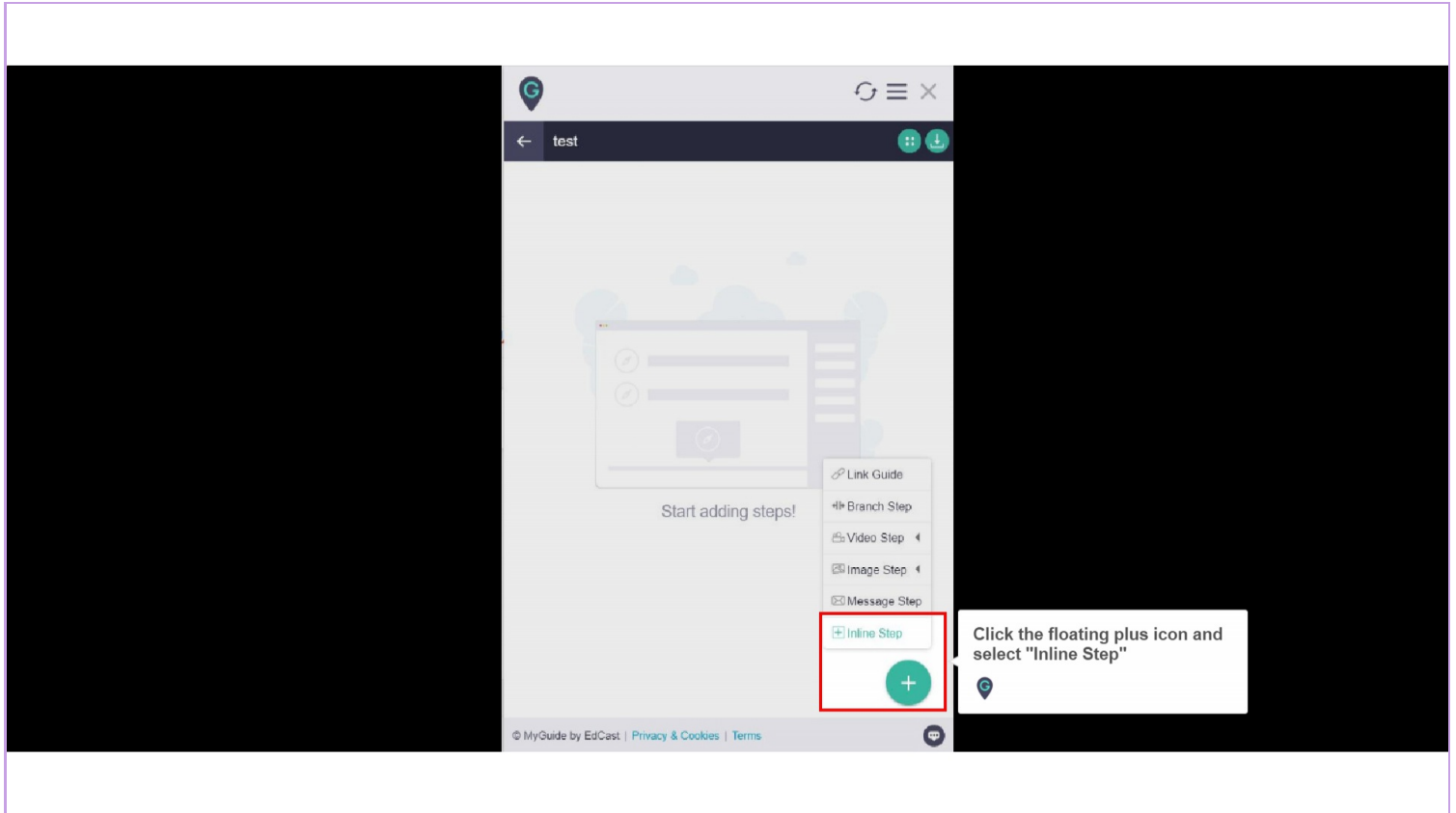




Inline Automation Section

Step: 01

1) Click the floating plus icon and select "Inline Step"



Step: 02

We will learn the use case of automation settings on Salesforce

1) Click the floating plus icon and select "Inline Step"

The screenshot displays the Salesforce MyGuide interface. On the left, there is a 'Quarterly Performance' dashboard with a line chart showing sales from January to March. The chart includes a goal line at 2.4M 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, the 'Test - Opportunities' page is shown in a floating window. A menu is open, listing various automation steps: 'Link Guide', 'Branch Step', 'Video Step', 'Image Step', 'Message Step', and 'Inline Step'. The 'Inline Step' option is highlighted with a red box. A callout box with a location pin icon points to this option, containing the text 'Click the floating plus icon and select "Inline Step"'. Another callout box points to the top of the automation settings menu, containing the text 'We will learn the use case of automation settings on Salesforce'. A floating plus icon is also visible at the bottom right of the automation settings menu.

Step: 03

We will create the first step by selecting on click condition with page reload option

For every click condition, MyGuide automation auto-clicks the button which we select while creating a step

The screenshot displays the MyGuide automation interface. On the left, a Salesforce dashboard is visible with a navigation menu where 'Opportunities' is highlighted. A red box highlights the 'Opportunities' menu item, and a callout box points to it with the text 'Click on "Opportunities"'. The main dashboard area shows a 'Quarterly Performance' chart with data for January, February, and March. Below the chart are sections for 'Today's Events' and 'Today's Tasks'. On the right, the 'Create Step' panel is open. It shows a table with columns for 'Step Title', 'Step Description', and 'Step Audio'. The 'Step Title' is 'Click on "Opportunities"'. Below the table, there is a section titled 'Choose when to proceed to the next step' with several radio button options. The 'Page reloads' option is selected and highlighted with a red box. Other options include 'Default', 'Opens new tab/window', 'Continue in parent window', 'On click of the selected element', 'On click of "Next" button', 'On right click on the selected element', 'On hover over the selected element', 'On change of value (for select field)', 'On click anywhere on the page', and 'On click anywhere on the page, pause this guide'. At the bottom of the panel are 'Cancel', 'Save & Next', and 'Save' buttons. A central callout box contains the text: 'We will create the first step by selecting on click condition with page reload option. For every click condition, MyGuide automation auto-clicks the button which we select while creating a step'.

Step: 04

When we select a textbox, MyGuide auto-selects Typing condition

The screenshot displays the MyGuide configuration interface. At the top, there is a text input field with a character count of 24/250 and a note 'POWERED BY TINY'. Below this is the 'Choose when to proceed to the next step' section, which contains several radio button options:

- On click of "Next" button
- On click of the selected element
- On hover over the selected element
- On click anywhere on the page
- On typing, wait 1 second(s) (highlighted with a red box)
- On change of selection
- After 4 second(s)

A callout box with a plus sign icon and a location pin icon contains the text: "When we select a textbox, MyGuide auto-selects Typing condition". Below the radio buttons is a '+ Show More' link. The 'Step Popup Position' section features a grid of light green squares with a central square labeled 'Element'. To the right of the grid are input fields for 'Width' (300 px) and 'Height' (0 px). At the bottom, there are three buttons: 'Cancel', 'Save & Next', and 'Save'.

Step: 05

For typing condition, "Requires human interaction" checkbox gets selected.

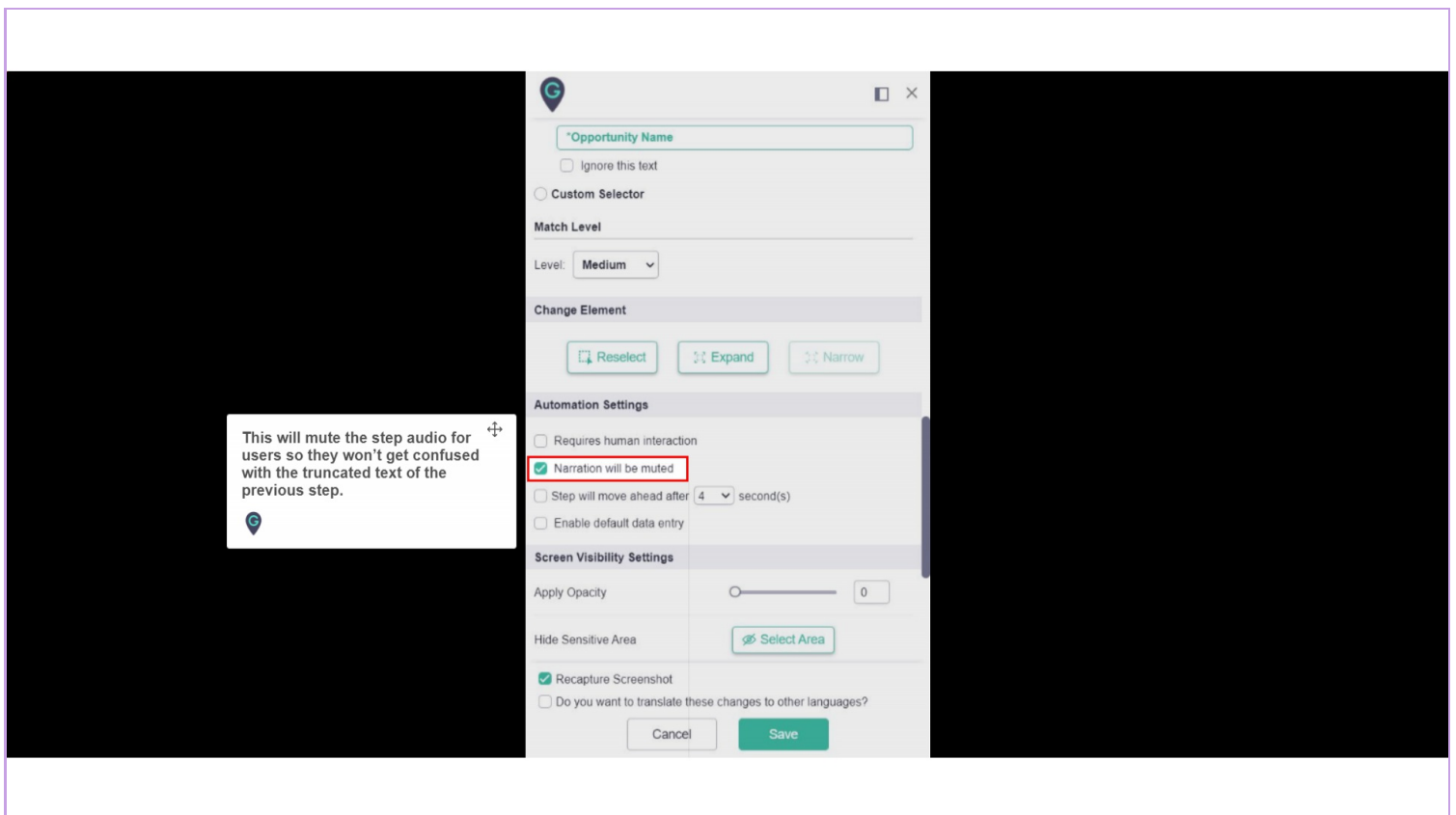
It suggests that MyGuide will only have to stop for the fields which require custom data entry; otherwise, it plays all the click events and moves forward. E.g., here the text field is opportunity name, which requires a custom input

The screenshot displays the MyGuide interface for creating a new opportunity. The main form is titled "New Opportunity" and includes sections for "Opportunity Information" and "Additional Information". The "Opportunity Name" field is highlighted with a red box. A callout box with a location pin icon points to this field, containing the text: "For typing condition, 'Requires human interaction' checkbox gets selected. It suggests that MyGuide will only have to stop for the fields which require custom data entry; otherwise, it plays all the click events and moves forward. E.g., here the text field is opportunity name, which requires a custom input".

In the "Automation Settings" panel on the right, the "Requires human interaction" checkbox is checked and highlighted with a red box. Other settings include "Ignore this text", "Custom Selector", "Match Level" (set to Medium), "Change Element" (with Reselect, Expand, and Narrow buttons), "Automation Settings" (with options for muted narration, step delay, and default data entry), "Screen Visibility Settings" (with an opacity slider), "Hide Sensitive Area" (with a Select Area button), "Recapture Screenshot" (checked), and a language translation option.

Step: 06

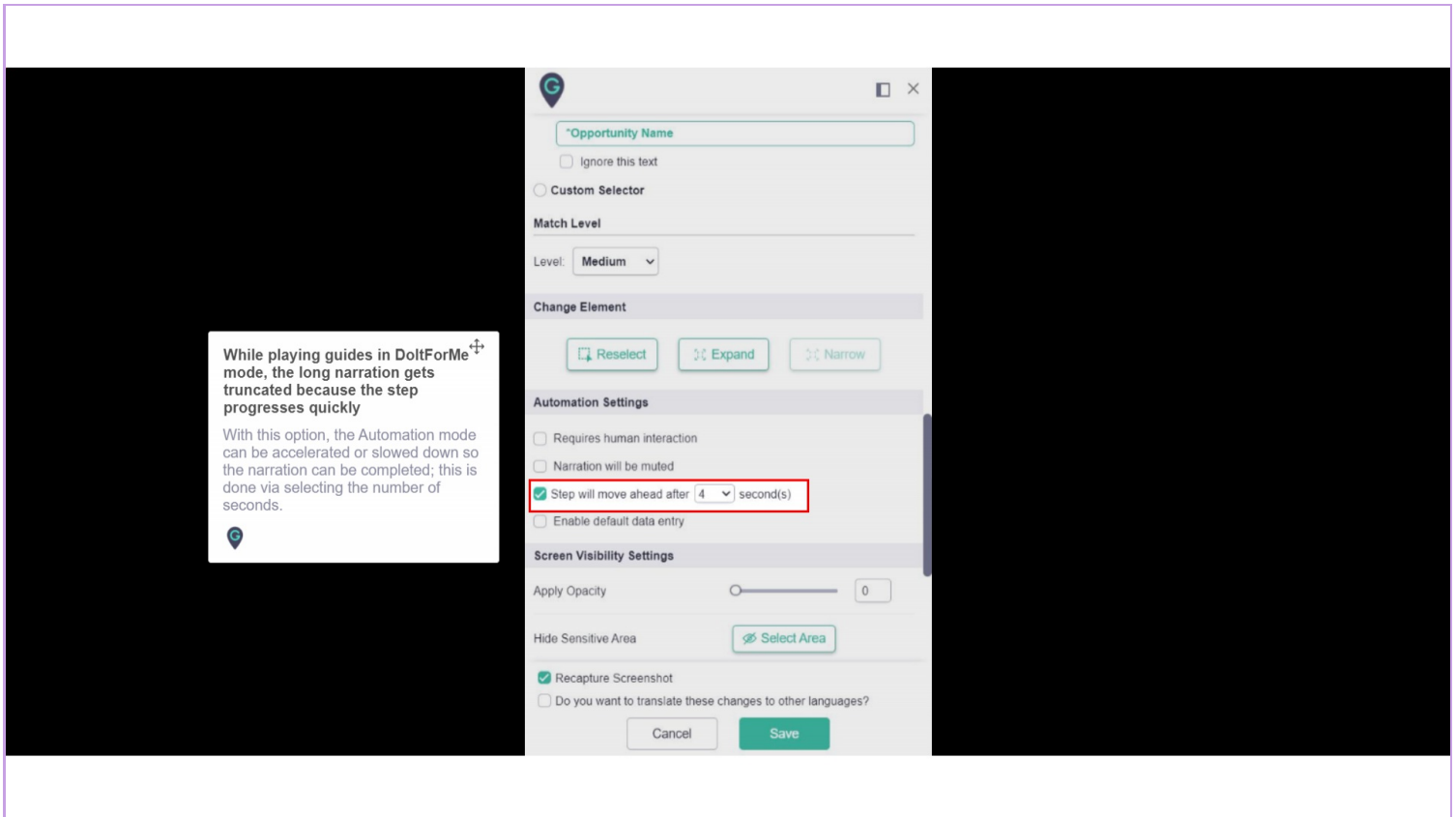
This will mute the step audio for users so they won't get confused with the truncated text of the previous step.



Step: 07

While playing guides in DoltForMe mode, the long narration gets truncated because the step progresses quickly

With this option, the Automation mode can be accelerated or slowed down so the narration can be completed; this is done via selecting the number of seconds.



Step: 08

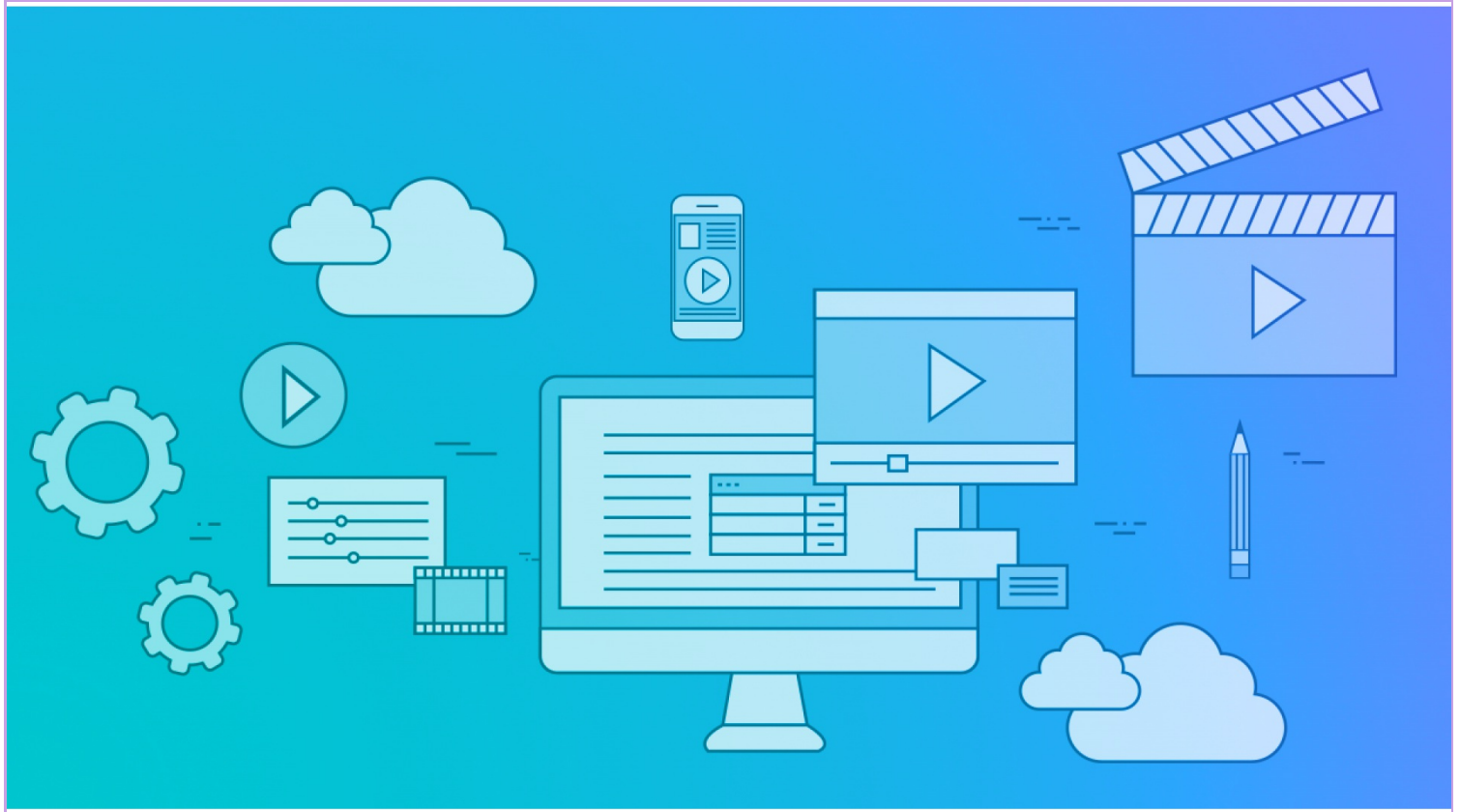
There can be some fields which pass on with same or pre-decided data, for such a case we can select the checkbox for "Enables default data entry" and the radio button for "Custom Input"

In this case, let's assume that we have a fixed value for data entry, so we enter it to the MyGuide field

The screenshot displays the MyGuide interface for creating a new opportunity. On the left, the 'Automation Settings' panel is open, showing the 'Enable default data entry' checkbox checked and the 'Custom Input' radio button selected. The 'Custom Input' field contains the value '\$5000'. A red box highlights this section. In the main 'New Opportunity' form, the 'Amount' field is highlighted with a red box, and a blue callout box says 'Enter "Amount"'. A white callout box explains that for fields with pre-decided data, the 'Enable default data entry' checkbox and 'Custom Input' radio button should be selected. The 'Custom Input' field contains the value '\$5000'.

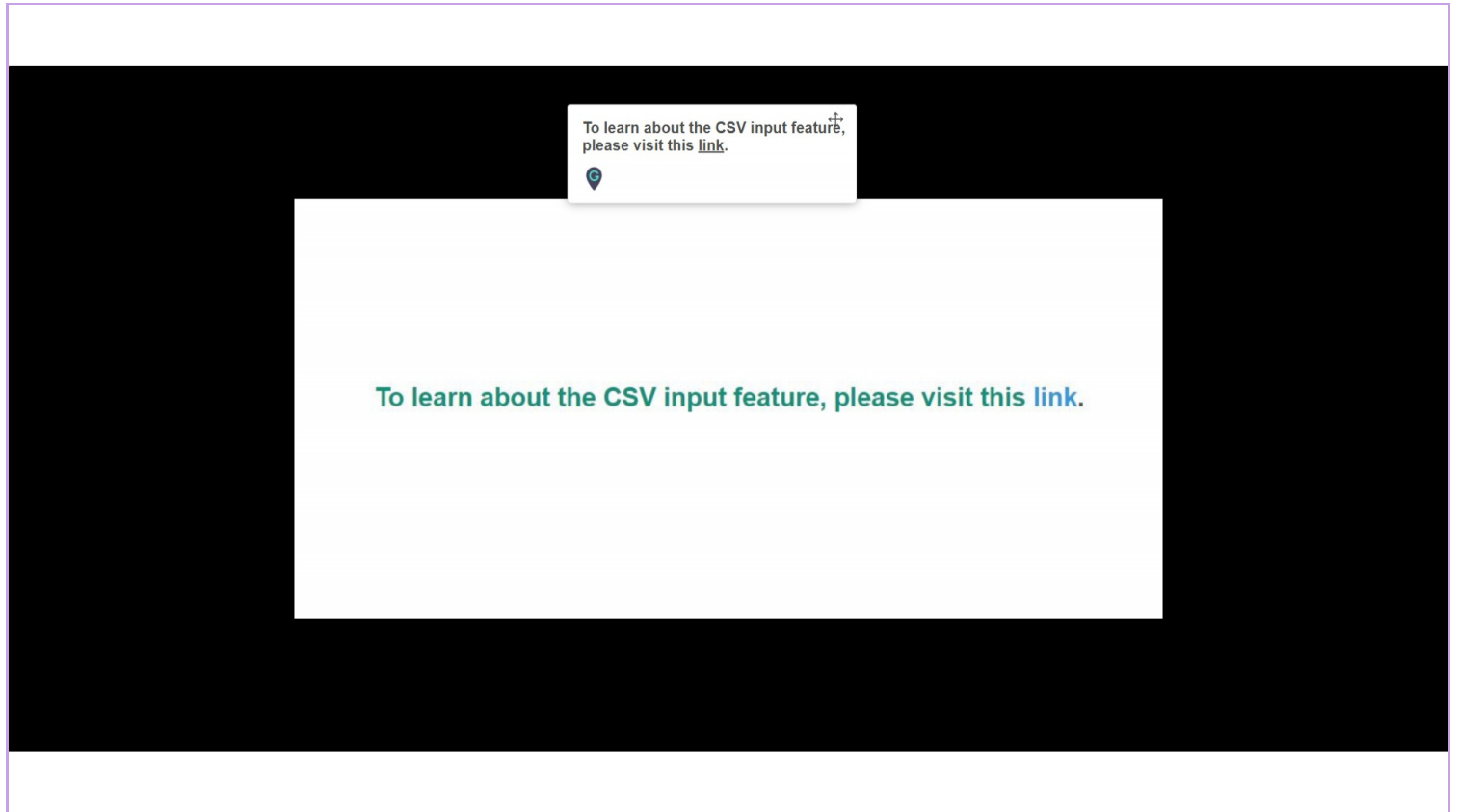
Step: 09

Automation Preview



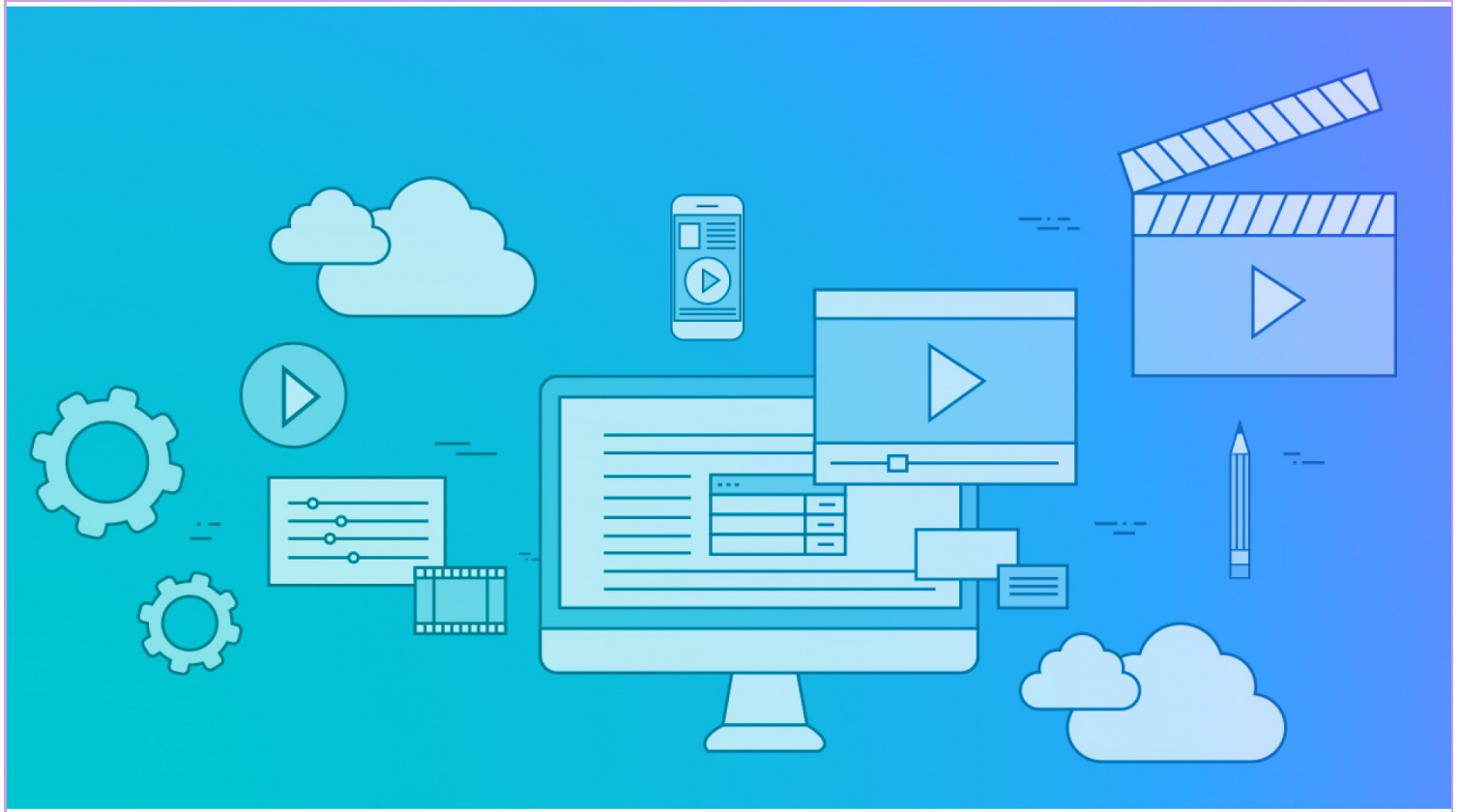
Step: 10

To learn about the CSV input feature, please visit this link.



Step: 11

CSV Input Preview



Thank you

myguide.org