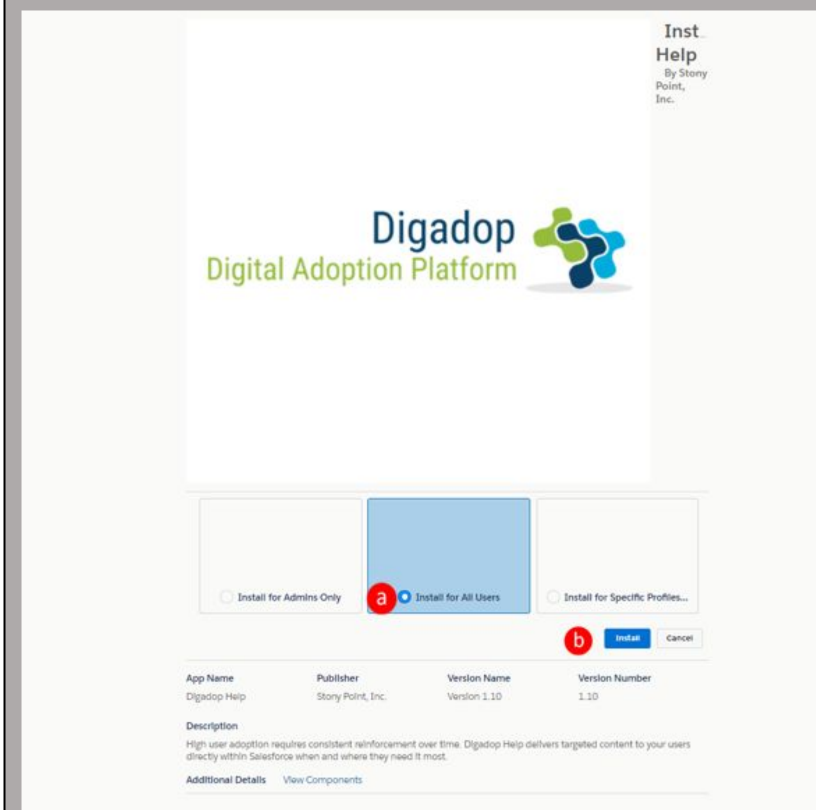
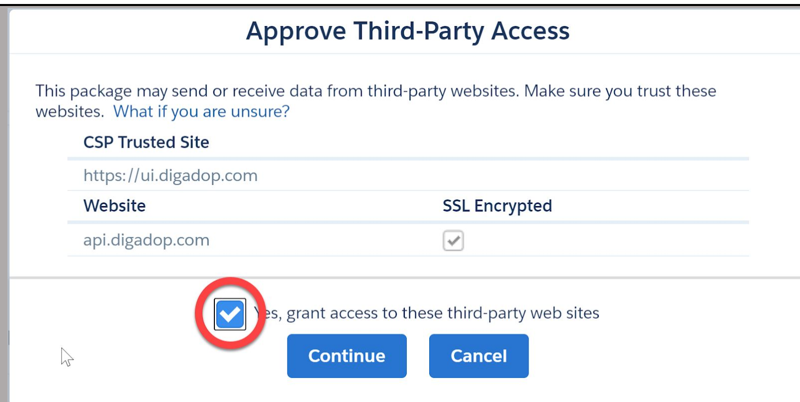
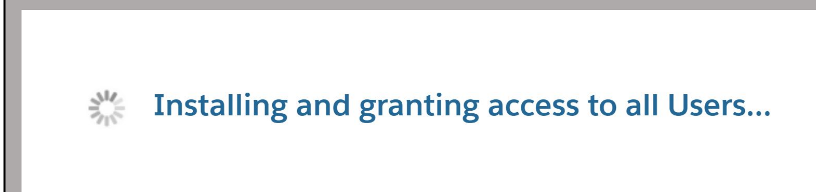
DIGADOP HELP GETTING STARTED GUIDE

Step 1: Install Digadop from the AppExchange

Prerequisites: Must be a System Administrator

1	a.) Choose to Install for All Users. b.) Click 'Install'.	

2	Check the box to grant access to the api.digadop.com third-party website. Click 'Continue'.	
3	Hold tight while we install 'Digadop Help'.	
4	Click "Done"	

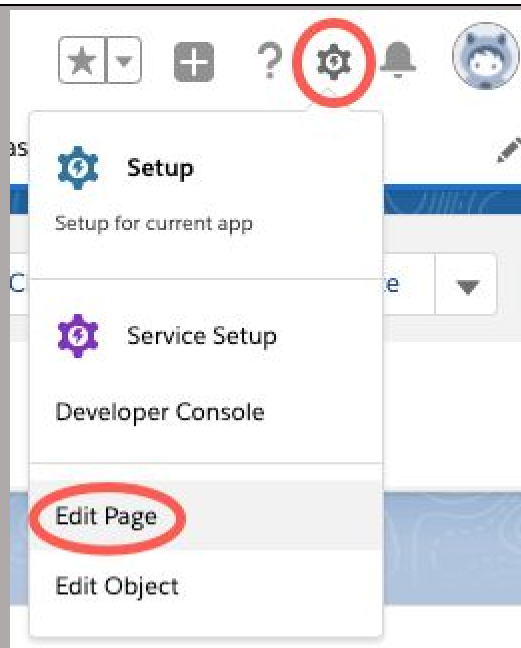
Step 2: Add the Digadop Help Button to Lightning Record Pages

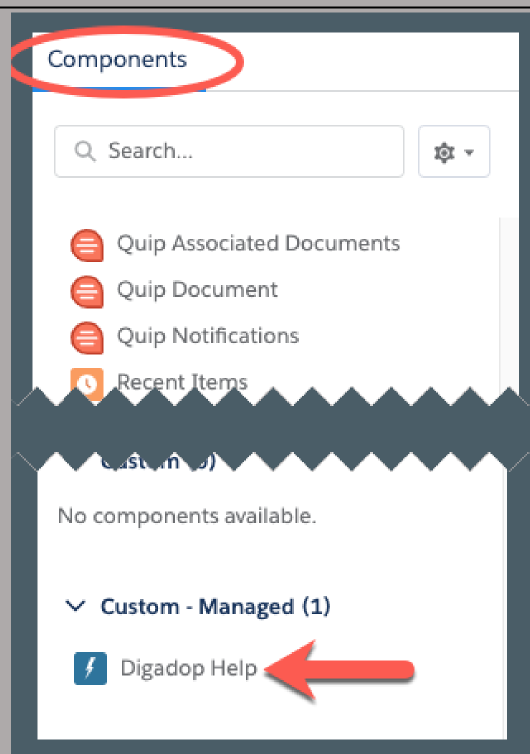
The Digadop 'Help' button gives you an easy way to access help content designed specifically for a certain page, right from that page!

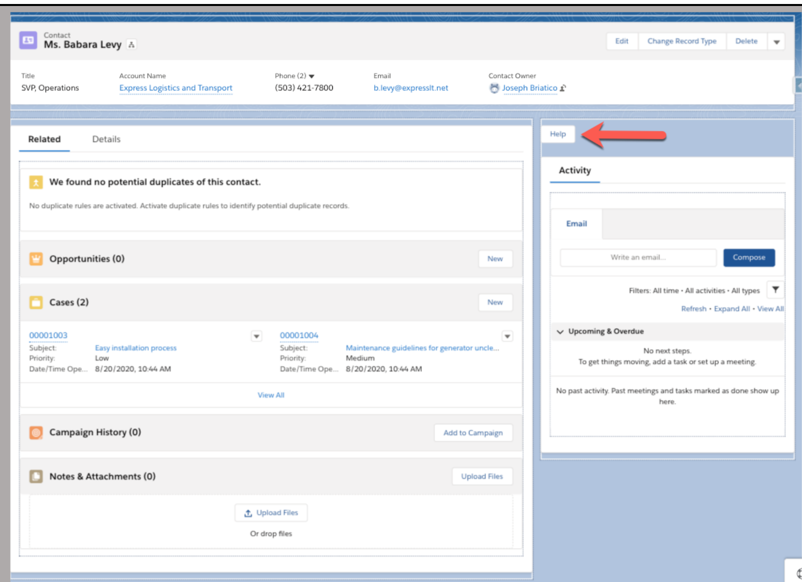
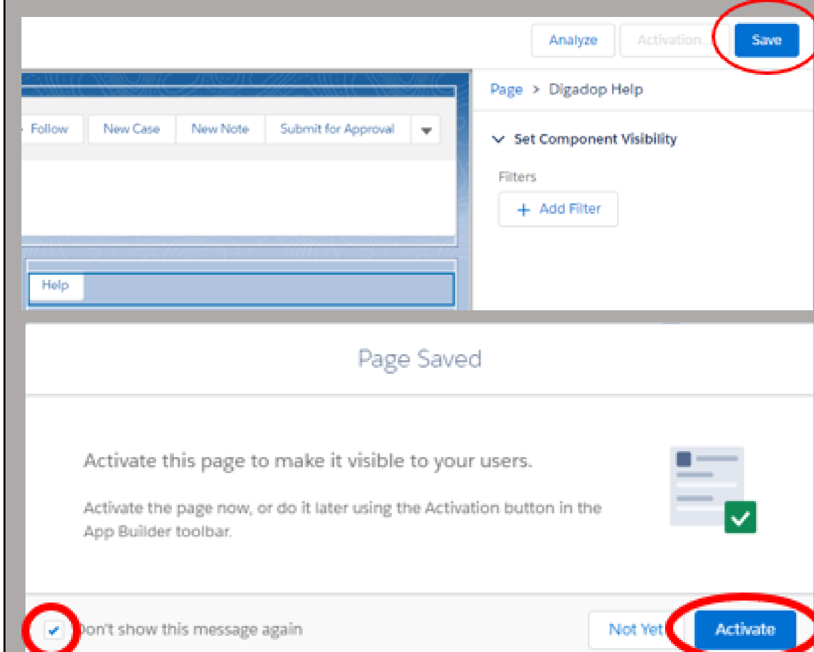
Prerequisites:

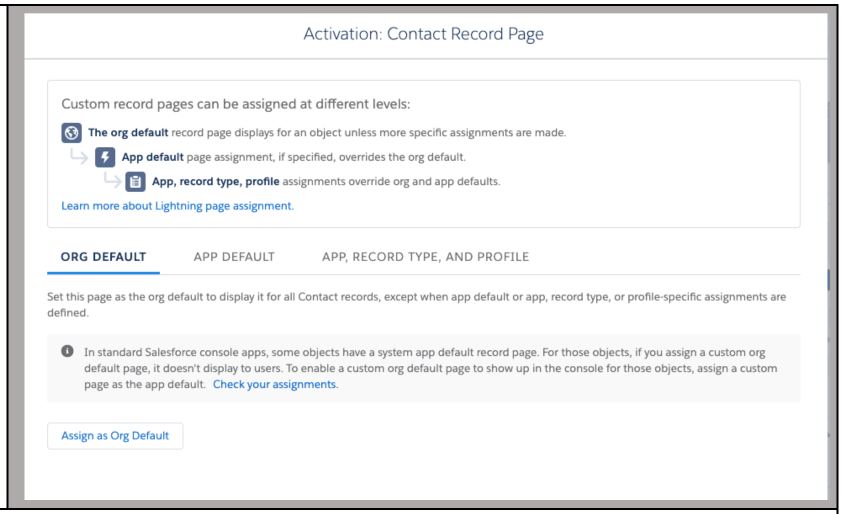
- *Must have the 'Customize Application' permission on your profile*
- *Must have already deployed your domain*

1	**Let's walk through adding the Digadop Help button to a Contact record page.** Navigate to a Contact record page where you would like the button to appear.	

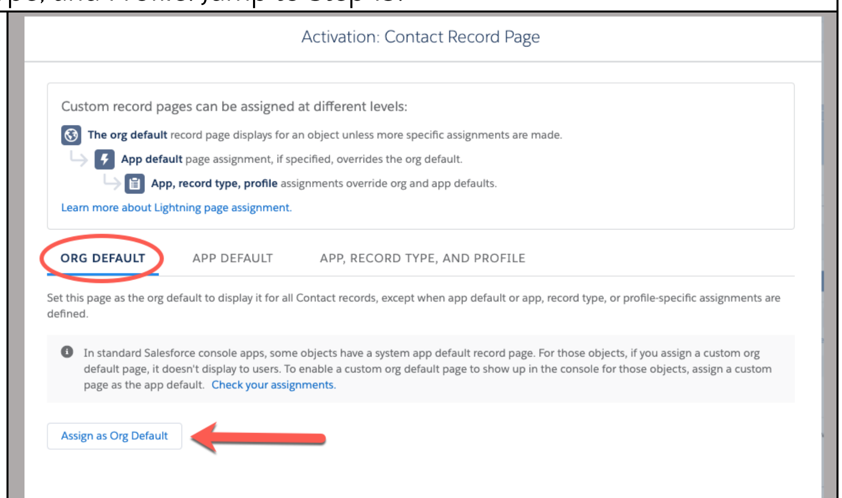
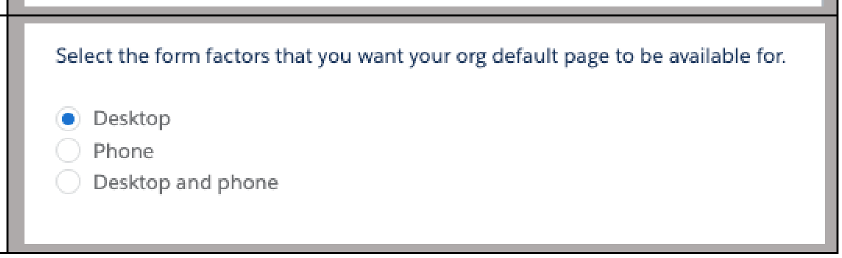
<table>
<tr><td></td><td>Click the gear icon, then click ‘Edit Page’.</td><td>
</td></tr>
<tr><td>2</td><td>Locate the ‘Digadop Help’ button.

You’ll find the button in the Components area in the ‘Custom – Managed’ section (bottom left-hand corner.)</td><td>
</td></tr>
<tr><td>3</td><td>Click and drag the</td><td></td></tr>
</table>

	'Digadop Help' button to any spot on the page layout. We recommend placing it above the section on the right-hand side.	
4	Click "Save". At this step, you can choose to opt out of seeing this reminder in the future. To activate your page, click the 'Activate" button. .	

<table>
<tr>
<td>5</td>
<td>Next, you can choose whether to assign your Contact record page as the Org Default, the App Default, or assign to specific apps, record types, and profiles.</td>
<td>
</td>
</tr>
<tr>
<td></td>
<td colspan="2">If you are not sure who to activate this page for, see this article from Salesforce:
Activate Lightning Experience Record Pages

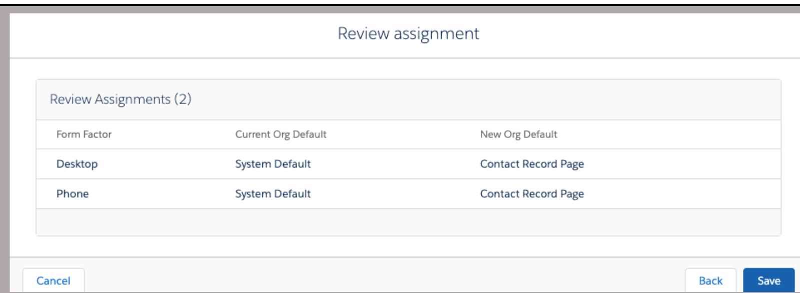
Option 1: Org Default. Continue to Step 6
Option 2: App Default. Jump to Step 9
Option 3: App, Record Type, and Profile. Jump to Step 13.</td>
</tr>
<tr>
<td>6</td>
<td>Option 1: Org Default

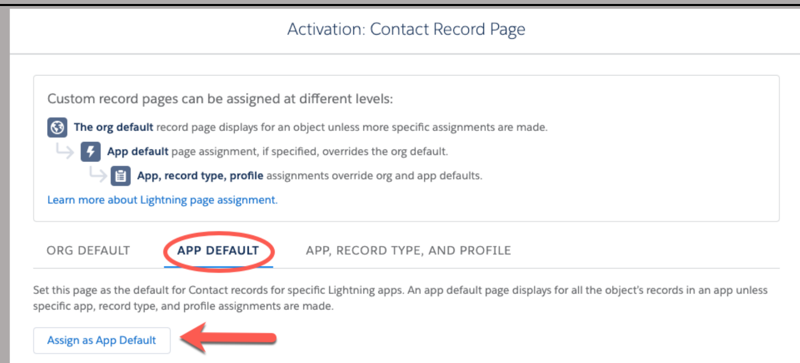
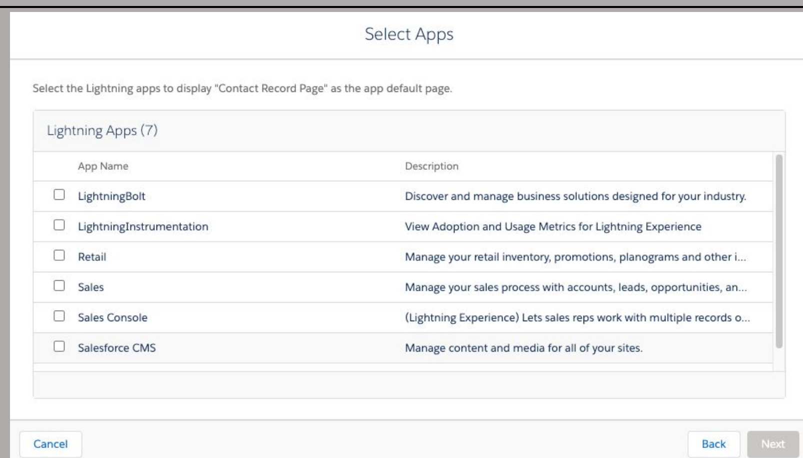
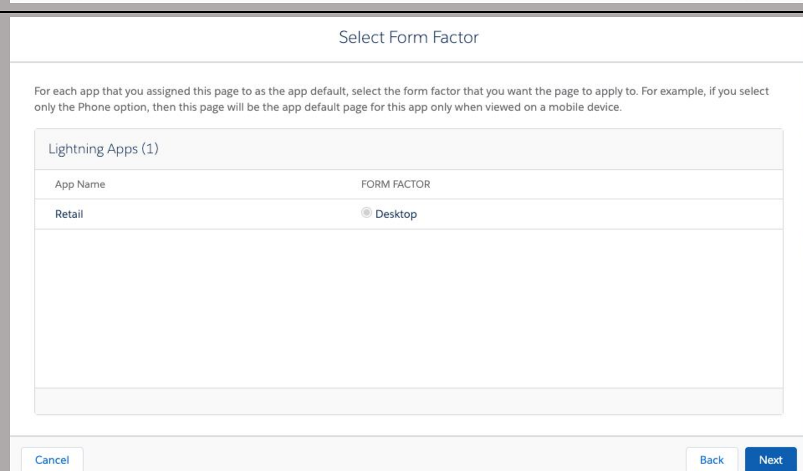
To activate this page for all Users with no restrictions, choose ‘Assign as Org Default’ from the ORG DEFAULT tab.</td>
<td>
</td>
</tr>
<tr>
<td>7</td>
<td>Next, choose the form factors for your Org Default page.</td>
<td>
</td>
</tr>
</table>

Digadop
Digital Adoption Platform

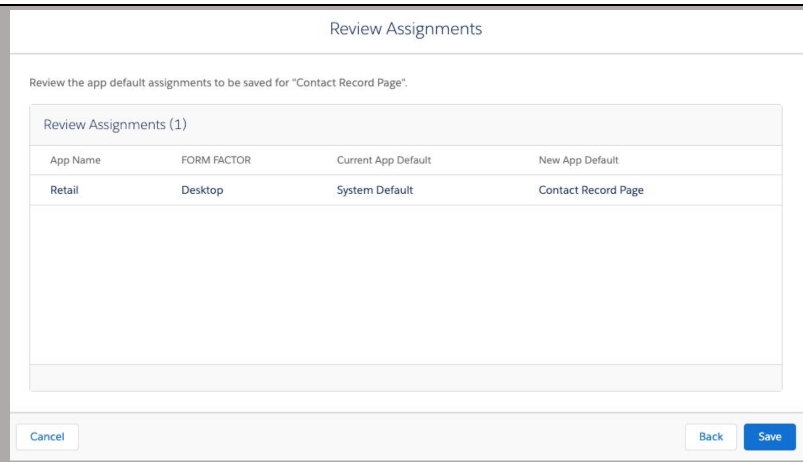
Stony Point

<table>
<tr><td>8</td><td>Review your assignment and click ‘Save’.

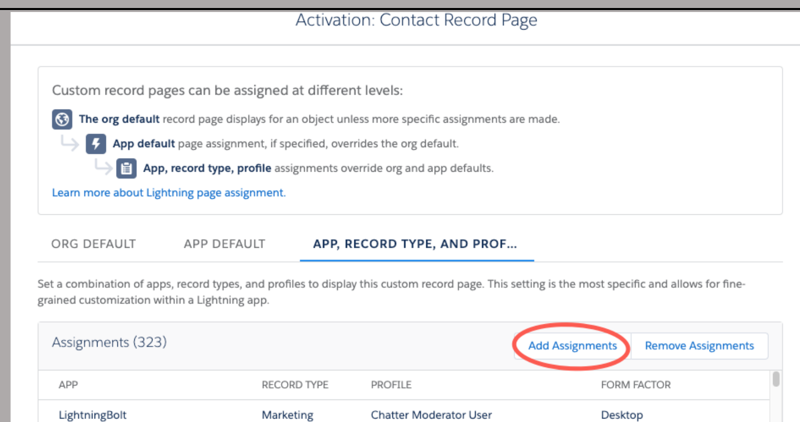
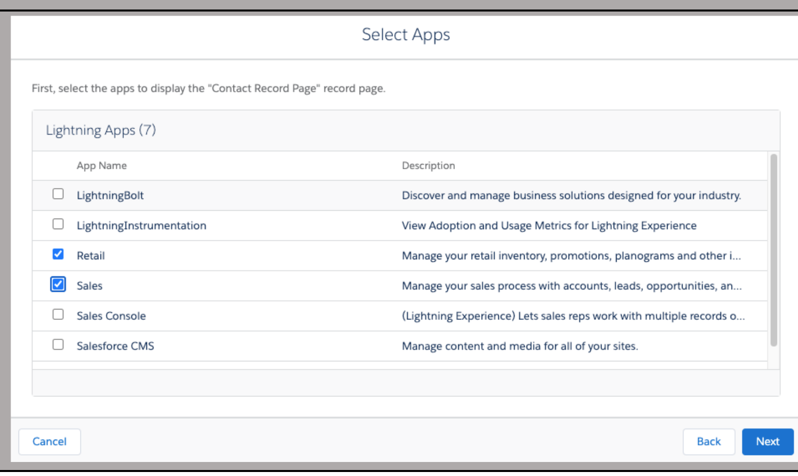
Jump to Step 19.</td><td>
</td></tr>
<tr><td>9</td><td>Option 2: App Default

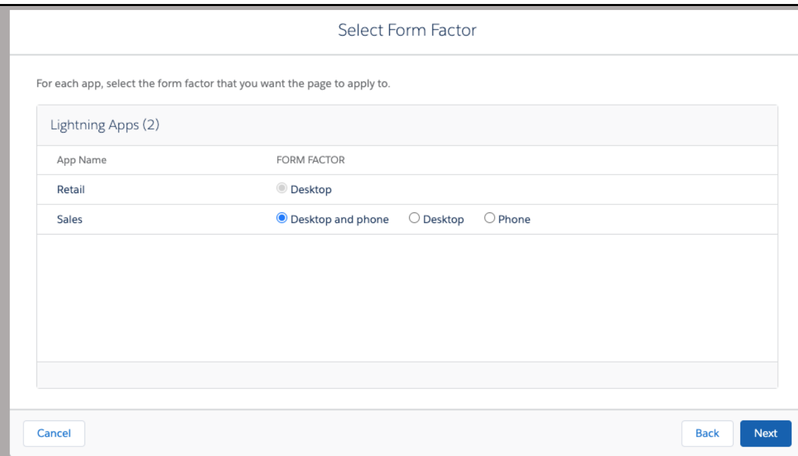
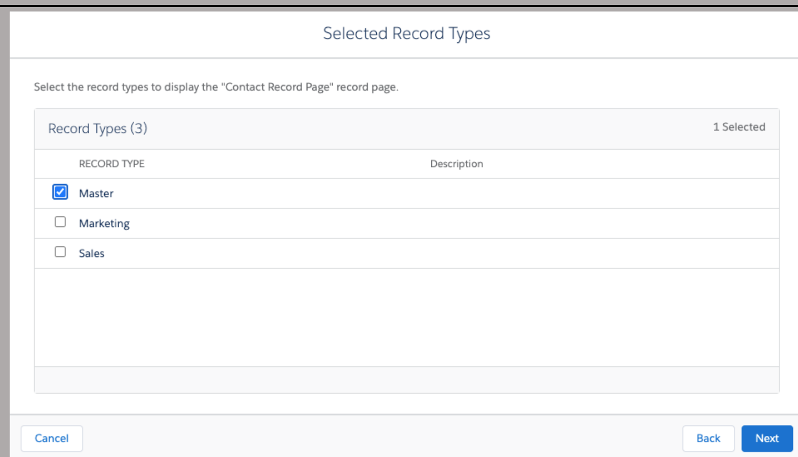
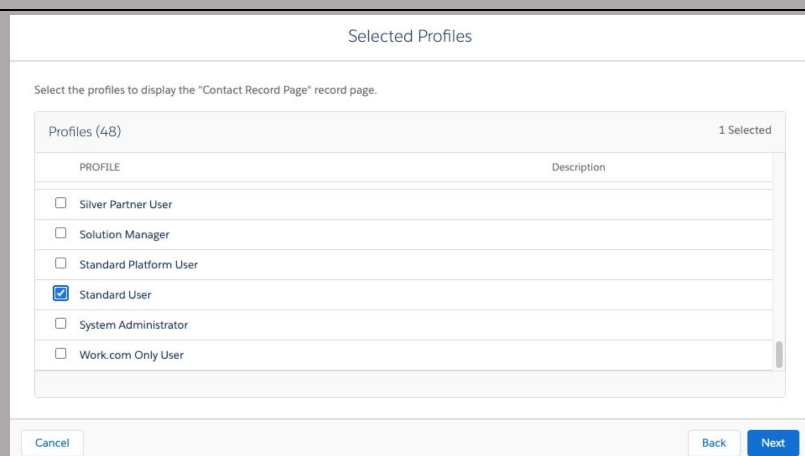
Assigning as the app default will make your page the default page for the app(s) you select.</td><td>
</td></tr>
<tr><td>10</td><td>Select the apps where you would like to display your page as the app default.</td><td>
</td></tr>
<tr><td>11</td><td>Next, choose the form factors for your App Default page.</td><td>
</td></tr>
</table>

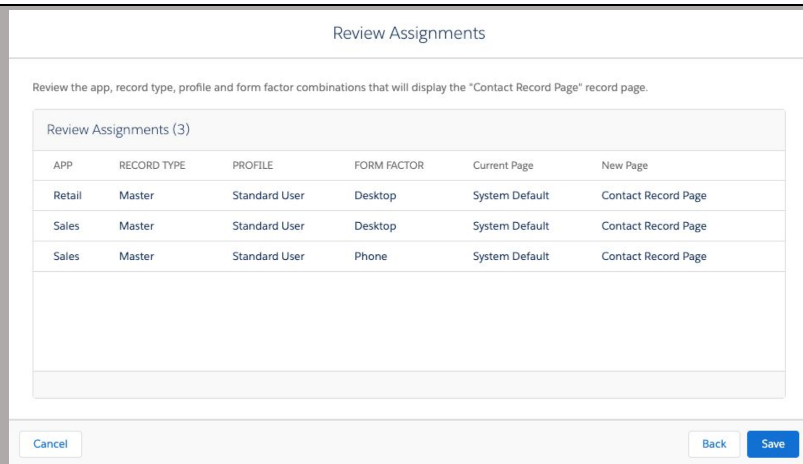
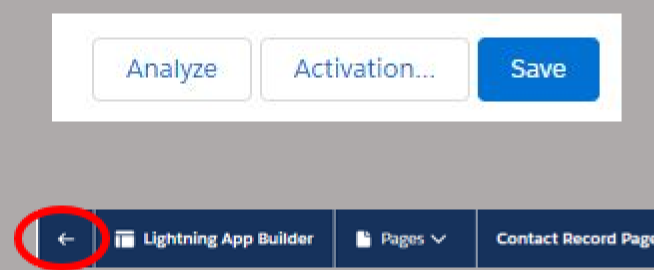
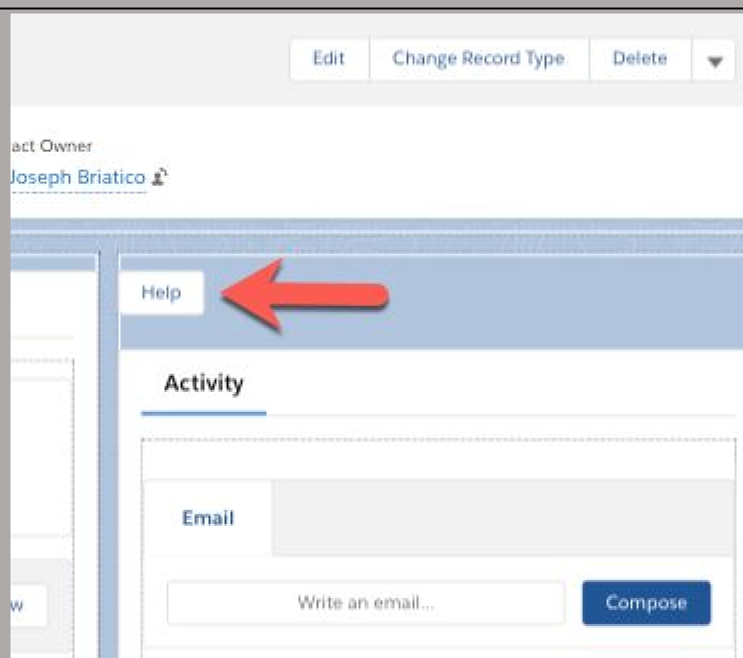
<table>
<tr>
<td>12</td>
<td>Review your assignments and click ‘Save’.

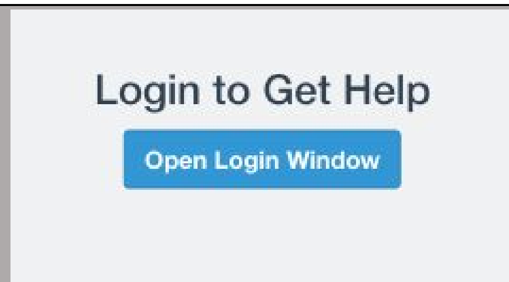
Jump to Step 19.</td>
<td>
</td>
</tr>
<tr>
<td>13</td>
<td>Option 3: Assign based on App, Record Type and Profile

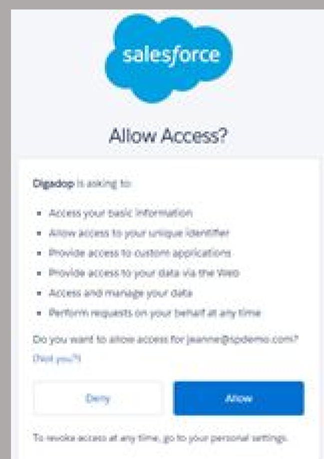
For more specific page assignment of your page, select the ‘App, Record Type and Profile’ tab.

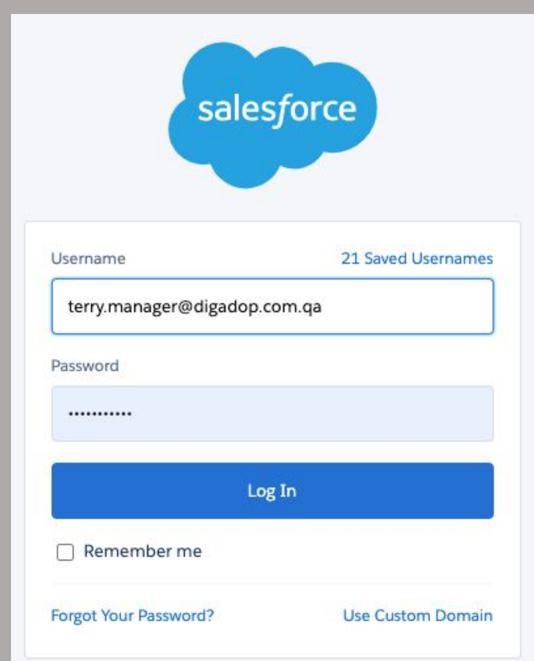
Click ‘Add Assignments’.</td>
<td>
</td>
</tr>
<tr>
<td>14</td>
<td>Select which apps will display your Lightning record page.</td>
<td>
</td>
</tr>
</table>

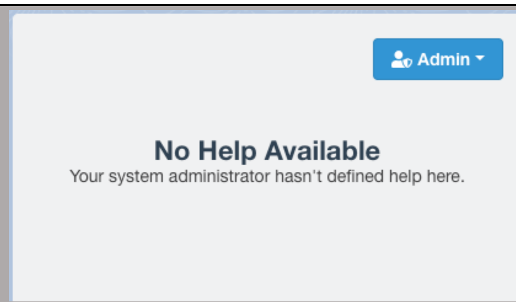
15	For each of the apps you have chosen, select the form factor you want for the page.	
16	Choose which record types to display your page.	
17	Choose which Profiles to display your page.	

18	Review your assignments and click ‘Save’.	
19	Now that you have activated your Contact record page, click ‘Save’ to save your changes. Click ‘Back’ to view the new button on your page. (top left corner of the page)	
20	Click the new ‘Digadop Help’ button on your Contact record page.	
21	The first time you click the ‘Digadop Help’ button, you will be prompted to login.	

<table>
<tr>
<td></td>
<td>Click ‘Open Login Window’.</td>
<td>
</td>
</tr>
<tr>
<td>22</td>
<td>Next, you will see the “Allow Access” screen. Click “Allow”

Next is the llogin screen. If you have multiple Salesforce logins, please ensure you are logging in with the correct username.</td>
<td>


</td>
</tr>
<tr>
<td>23</td>
<td></td>
<td></td>
</tr>
</table>

	You should see the ‘No Help Available’ message until Help Content Layouts have been created and assigned to this page.	

COMPLETING STEP 2:

Now that you have successfully added the ‘Digadop Help’ button to your Contact record page, we recommend adding it for all objects and all Lightning Record Pages in your org.

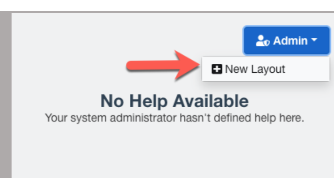
Adding the ‘Digadop Help’ button to a Lightning Record Page allows you to track your team’s usage metrics for that page. These metrics give you valuable insight into where help is most used. We recommend adding the ‘Digadop Help’ button for every page, even when there is no content created for that page. This will show you if there is a page where Users may be looking for help and not finding it.

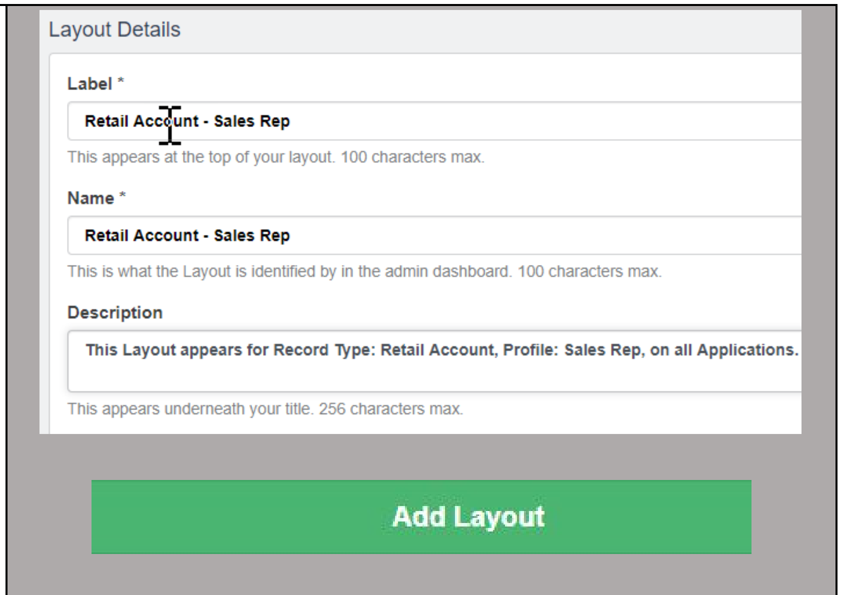
Step 3: Create a Help Content Layout

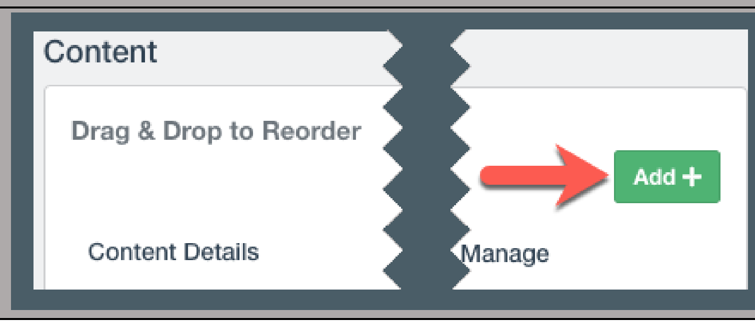
In this step you will create a Help Content Layout and add various types of content.

Prerequisites:

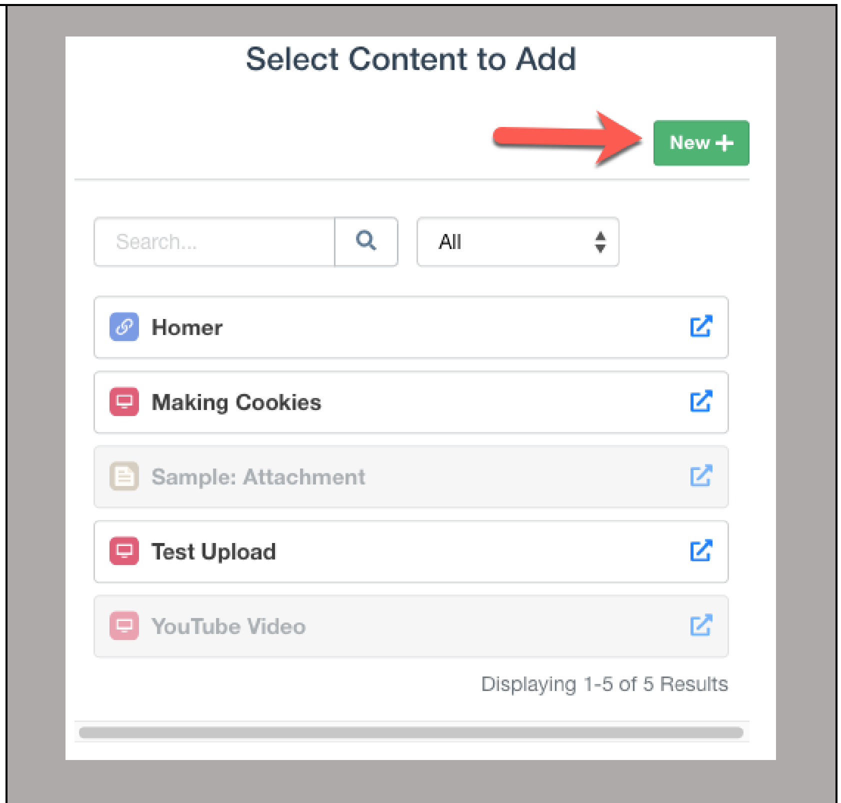
- *Must be a Digadop Admin*

1	Let’s create a new Help Layout. From the Contact record page, click on the Admin button and choose New Layout.	
2	Fill in the fields in the ‘Layout Details’ section. Click “Add Layout” to save your information.	

<table>
<tr>
<td></td>
<td></td>
<td>
</td>
</tr>
<tr>
<td>3</td>
<td>Add Content to Digadop, you can either

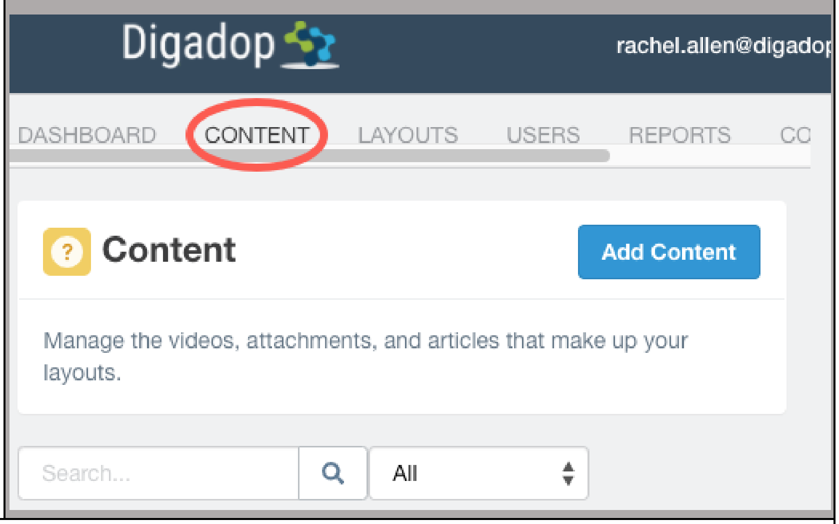
1. Click the ‘Add’ button in the Content section.</td>
<td>
</td>
</tr>
</table>

From here you can choose from existing Content or add New Content. To add New Content, Click the 'New' button to add new content to your layout.



OR

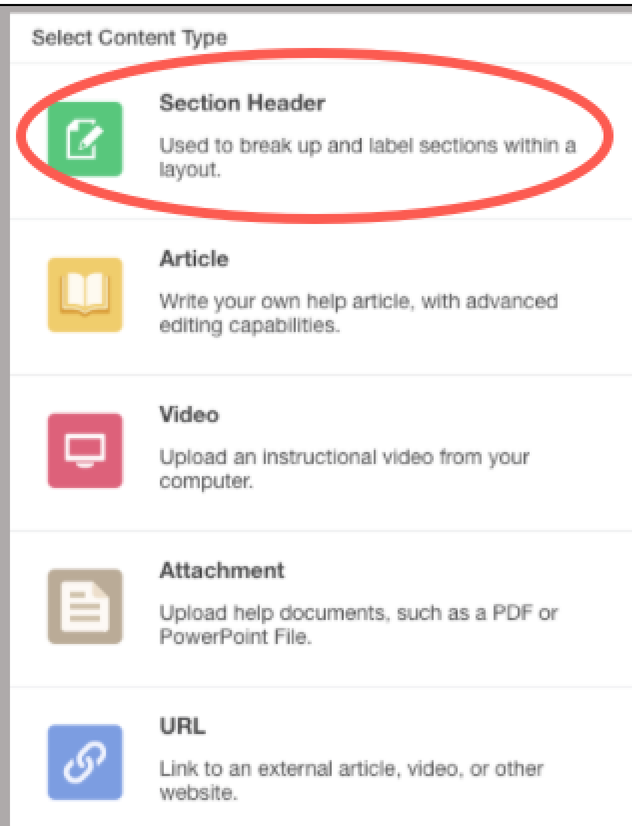
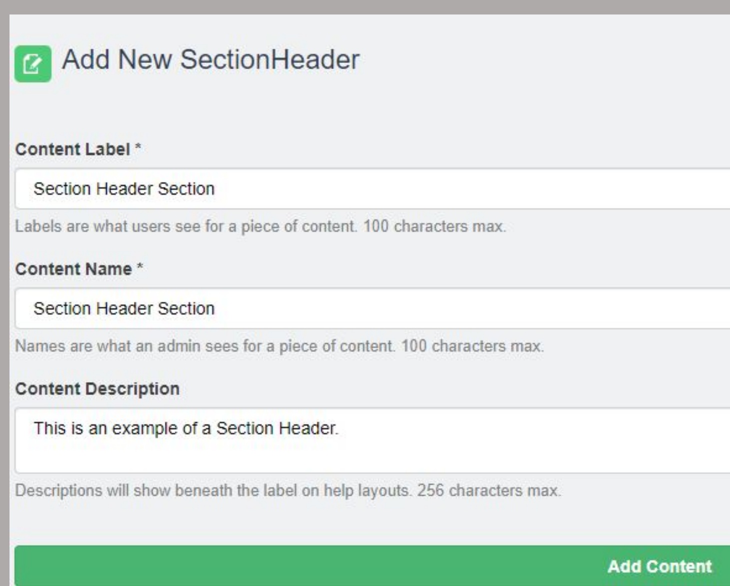
2. Go to the Content tab.

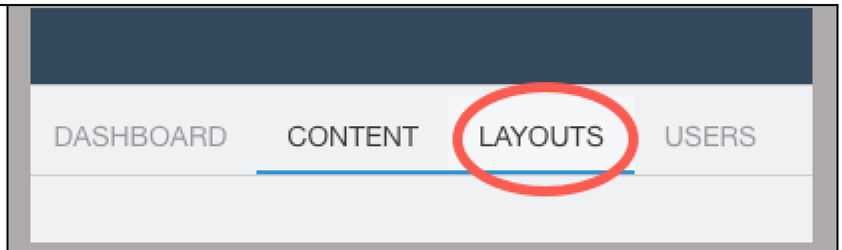
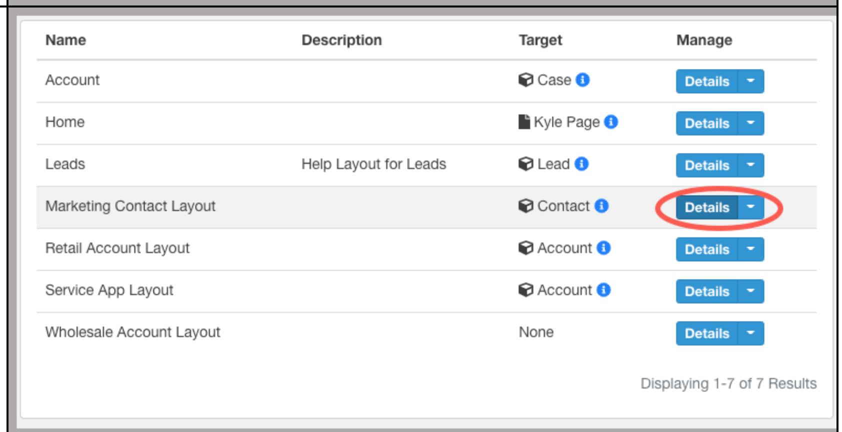
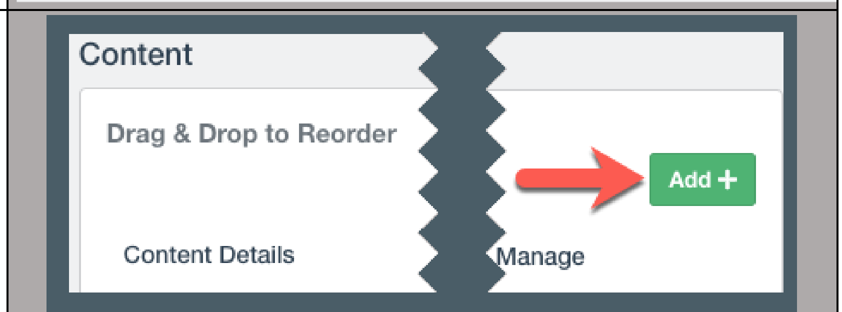
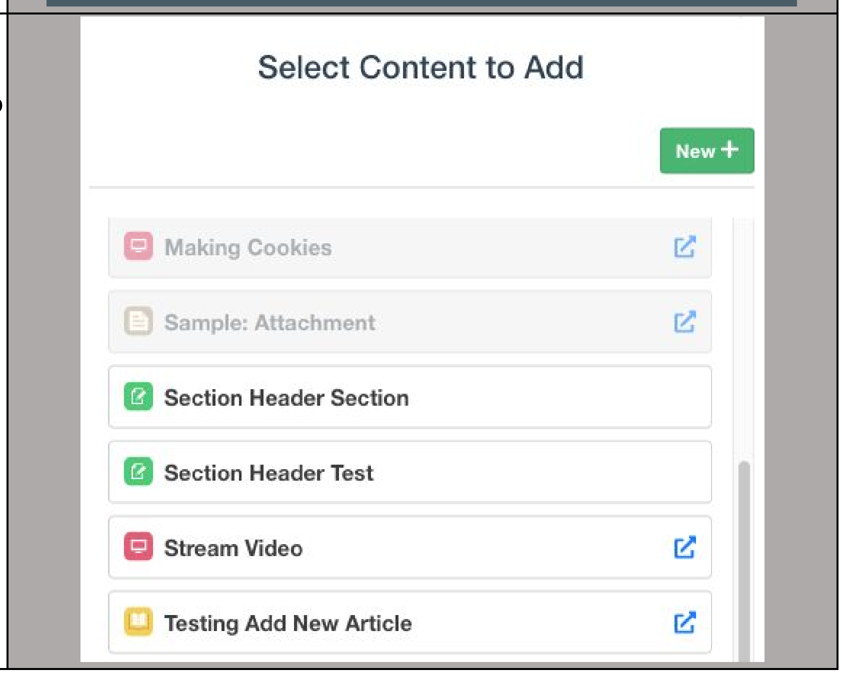


Step 3a: Add New Content: Section Header

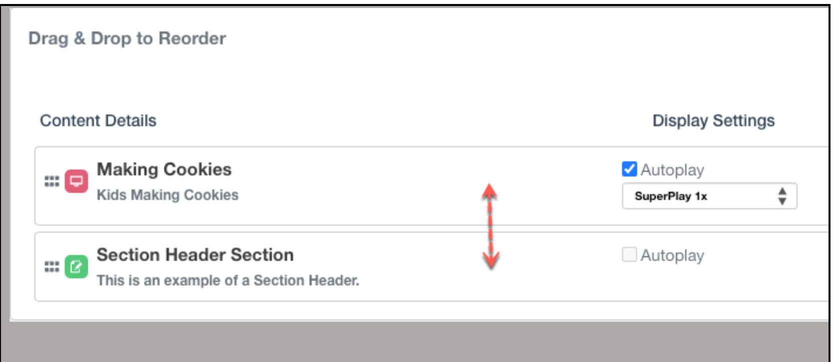
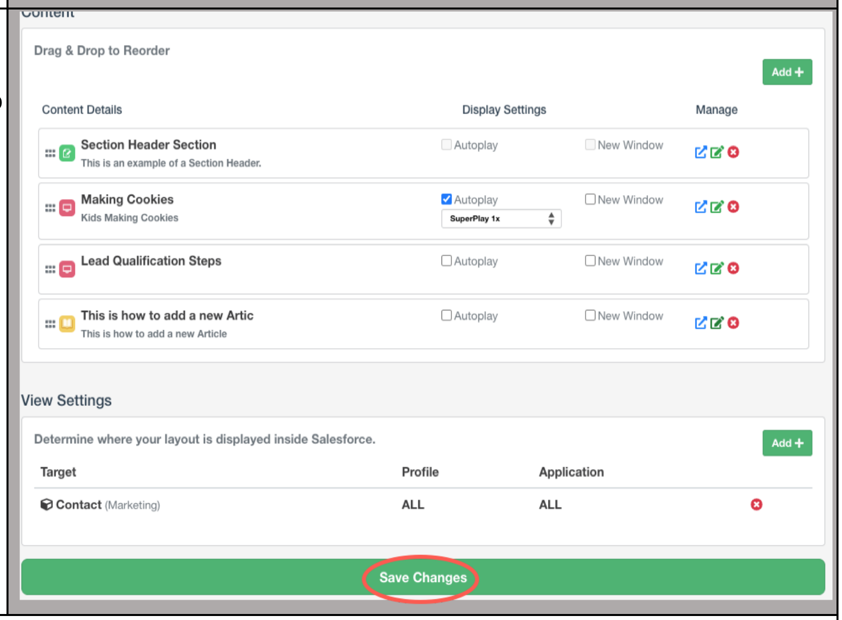
Digadop
Digital Adoption Platform

Stony Point

<table>
<tr>
<td>1</td>
<td>Select the type of Content you want to add. For this step, we'll add a Section Header.</td>
<td>
</td>
</tr>
<tr>
<td>2</td>
<td>Fill out the required fields and click 'Add Content' to save your changes.</td>
<td>
</td>
</tr>
</table>

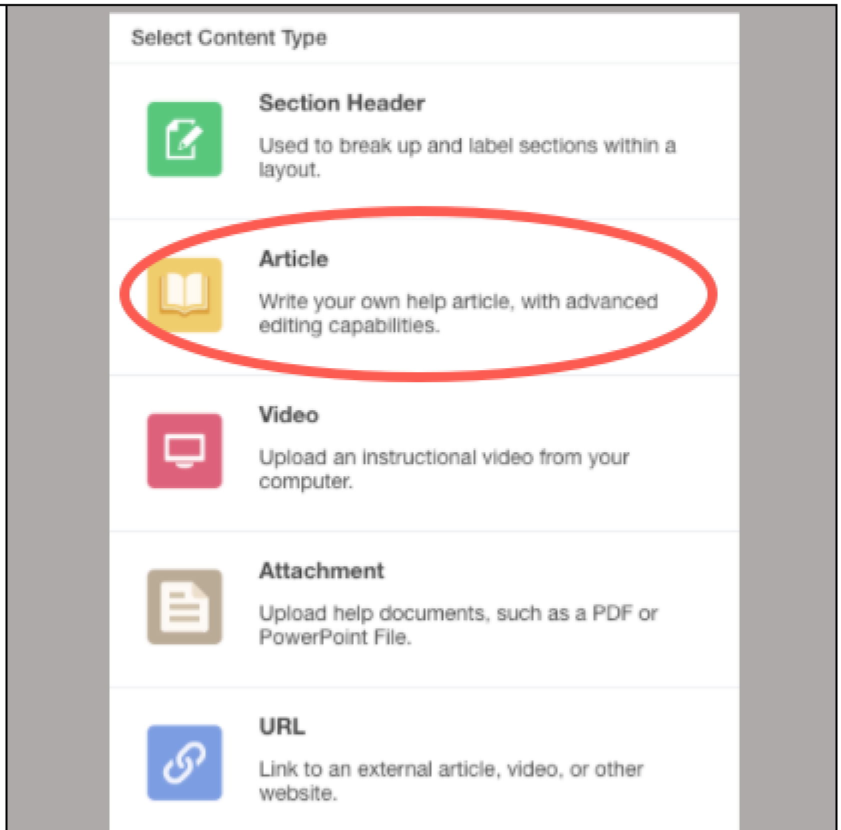
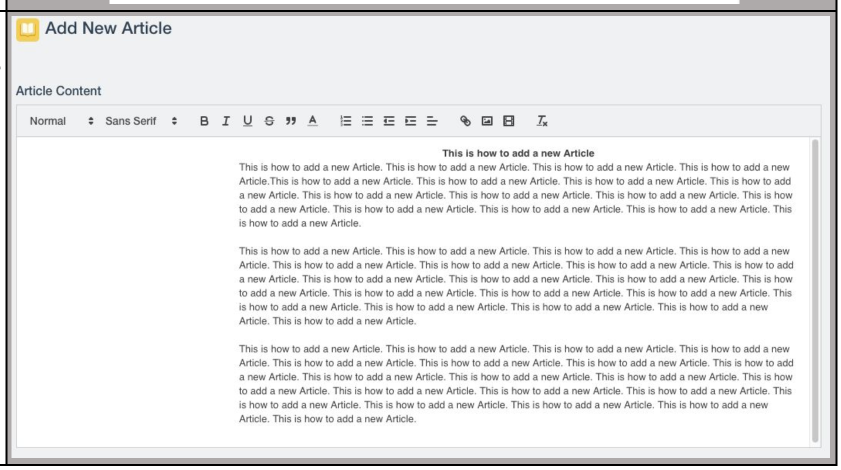
<table>
<tr><td>3</td><td>You will now need to navigate back to the Layouts tab to add the new content to the layout.</td><td>
</td></tr>
<tr><td>4</td><td>Click “Details” of the layout where you would like to add the new content.</td><td>
</td></tr>
<tr><td>5</td><td>Click ‘Add’ to add content.</td><td>
</td></tr>
<tr><td>6</td><td>Choose and click the Content you want to add to your layout.</td><td>
</td></tr>
</table>

<table>
<tr>
<td>7</td>
<td>You will now see your Section Header has been added to the Content section of your Layout.

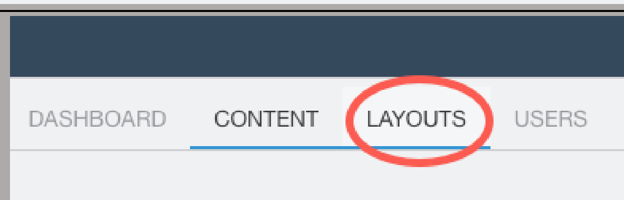
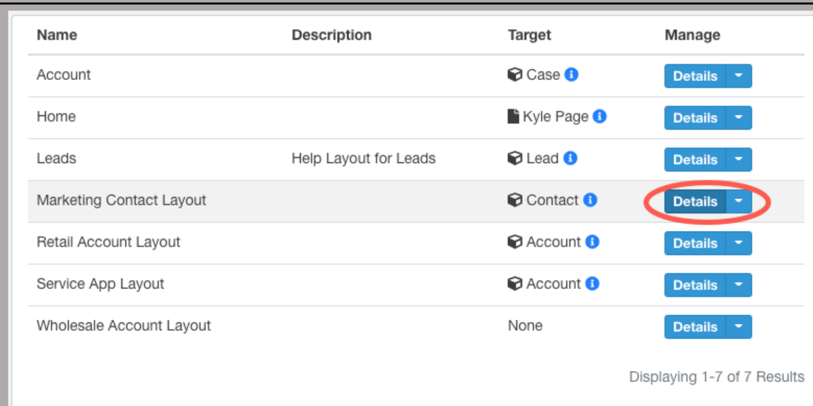
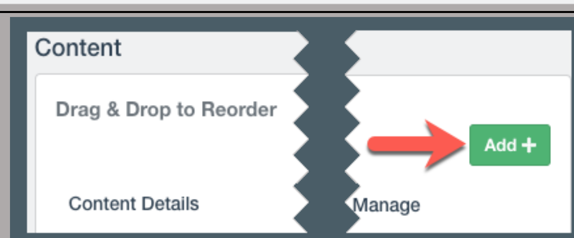
You can click and drag to reorder the content components.</td>
<td>
</td>
</tr>
<tr>
<td>8</td>
<td>After you add or reorder content, be sure to scroll to the bottom of the page to save your changes.</td>
<td>
</td>
</tr>
<tr>
<td colspan="3">Step 3b: Add New Content: Article</td>
</tr>
</table>

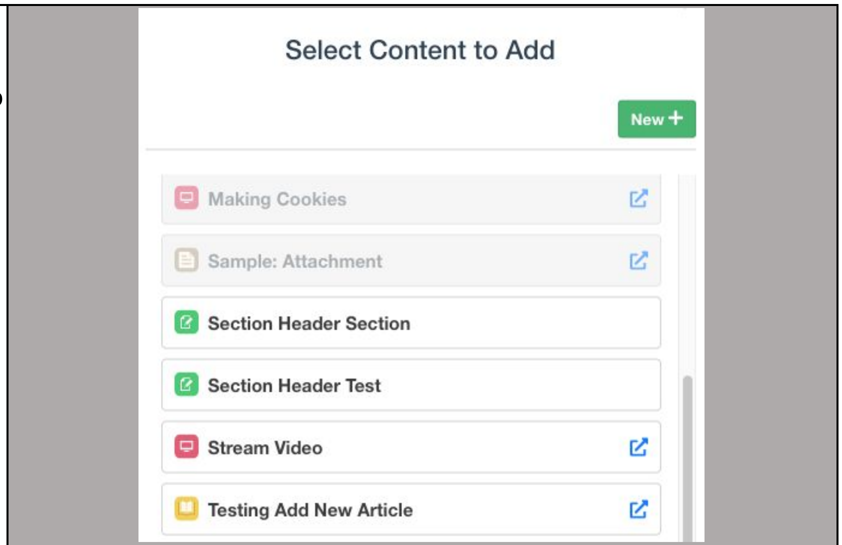
Digadop
Digital Adoption Platform

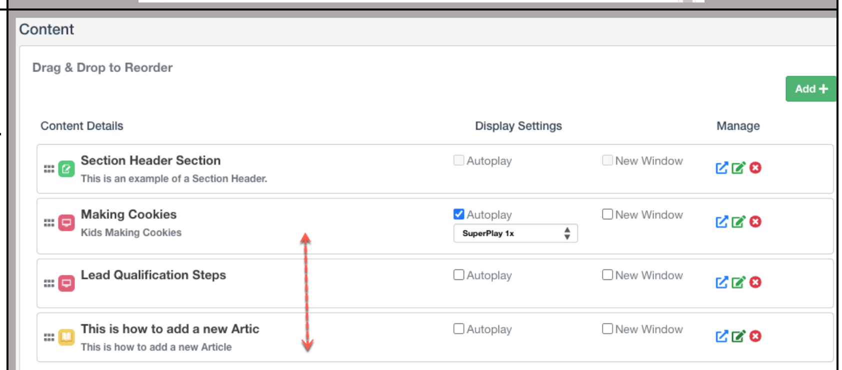
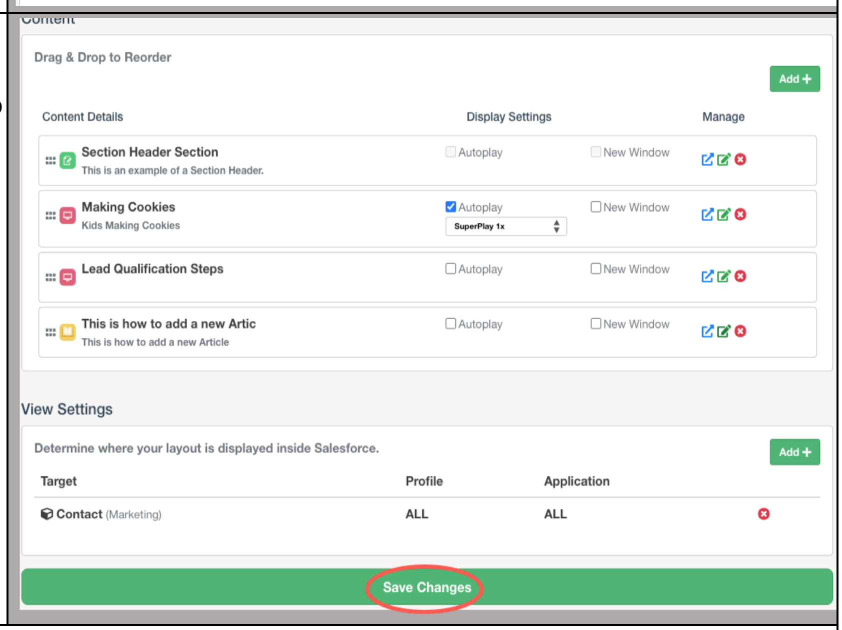
Stony Point

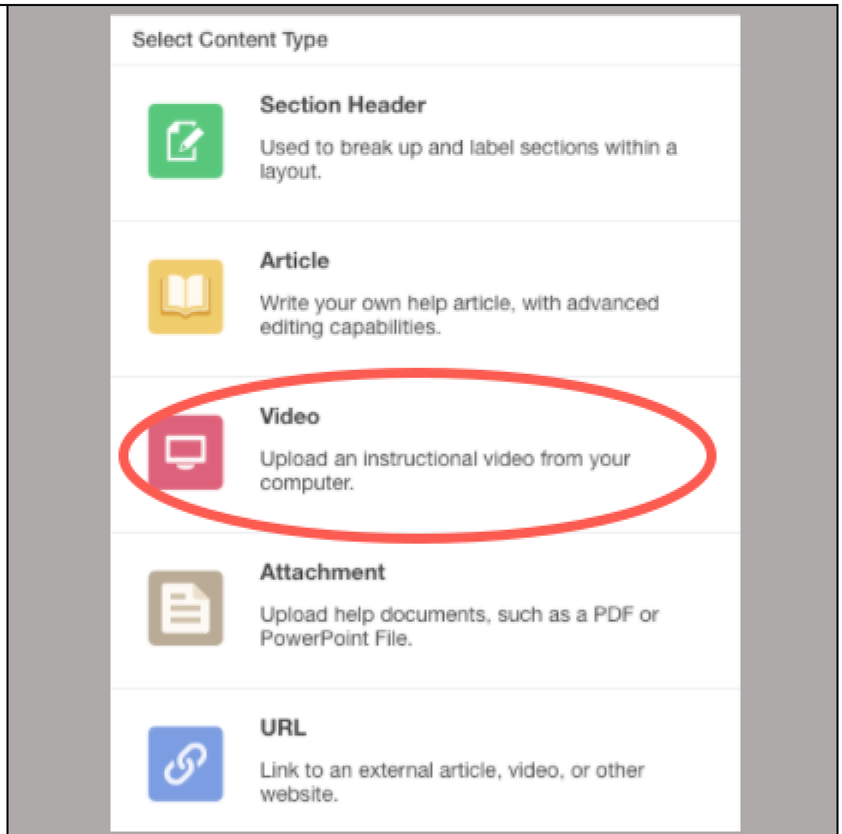
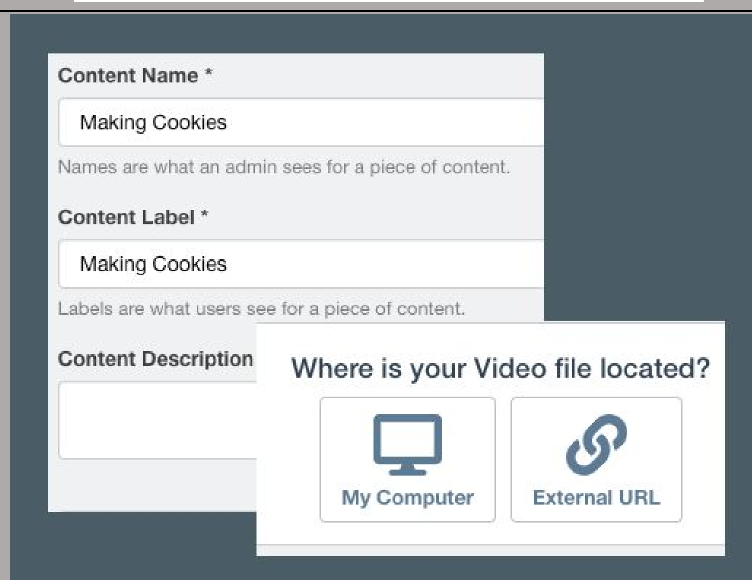
1	Select the type of Content you want to add. For this step, we'll add an Article.	
2	Copy and paste your Article or type it in the text editor.	

<table>
<tr><td>3</td><td>Fill out the Content Name, Content Label and Content Description fields.

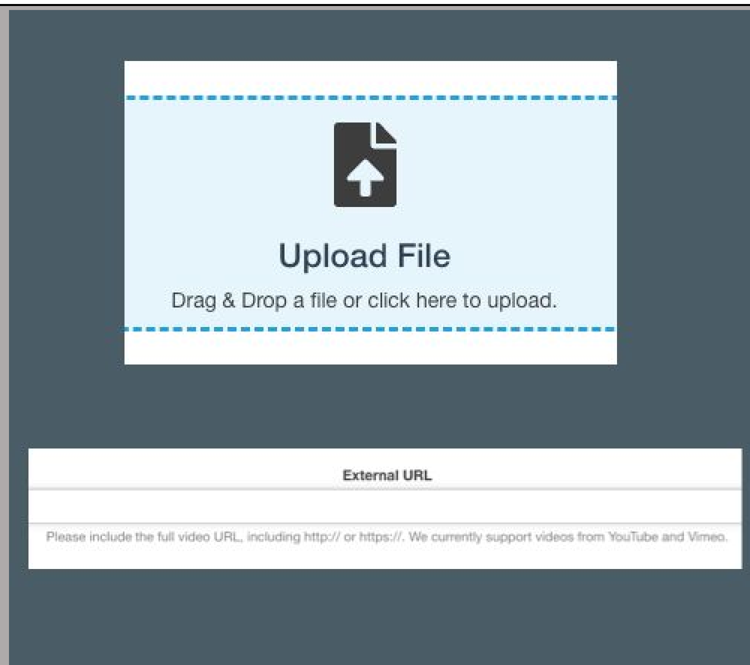
Click ‘Add Content’.</td><td>
</td></tr>
<tr><td>4</td><td>You will now need to navigate back to the Layouts tab to add the new content to the layout.</td><td>
</td></tr>
<tr><td>5</td><td>Click “Details” of the layout where you would like to add the new content.</td><td>
</td></tr>
<tr><td>6</td><td>Click ‘Add’ to add content.</td><td>
</td></tr>
</table>

<table>
<tr>
<td>7</td>
<td>Choose and click the Content you want to add to your layout.</td>
<td>
</td>
</tr>
<tr>
<td>8</td>
<td>You will now see your Article has been added to the Content section of your Layout.

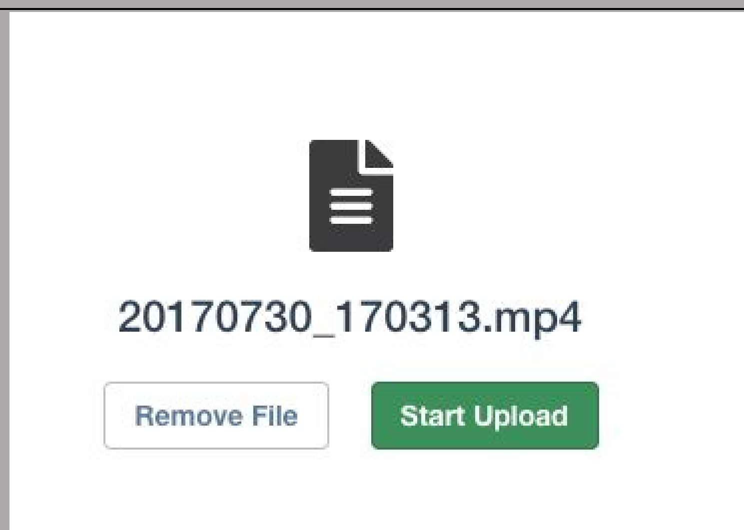
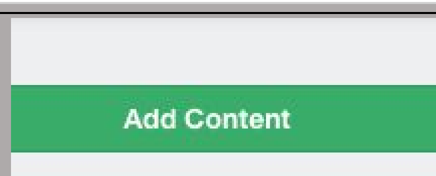
You can click and drag to reorder the content components.</td>
<td>
</td>
</tr>
<tr>
<td>9</td>
<td>After you add or reorder content, be sure to scroll to the bottom of the page to save your changes.</td>
<td>
</td>
</tr>
<tr>
<td colspan="3">Step 3c: Add New Content: Video</td>
</tr>
</table>

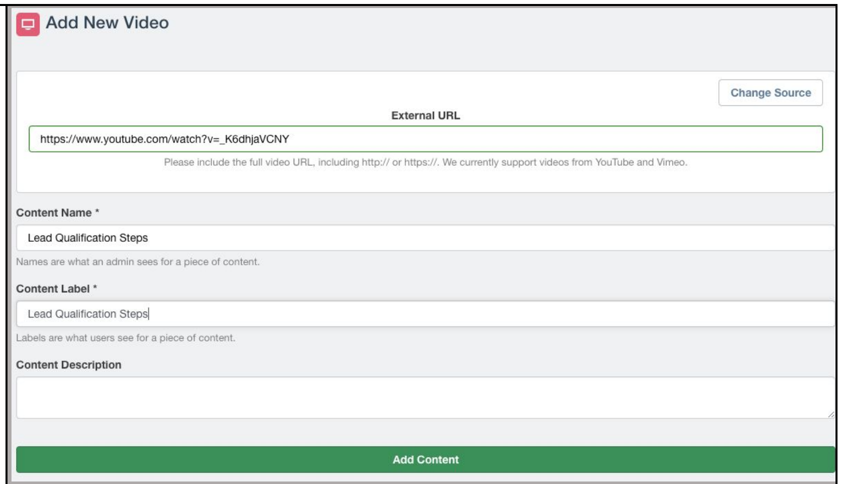
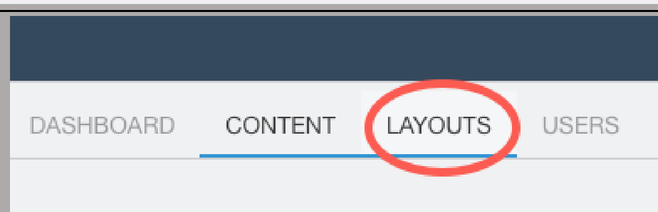
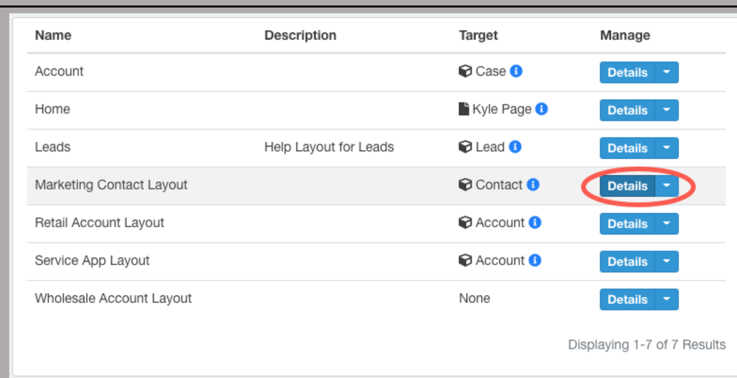
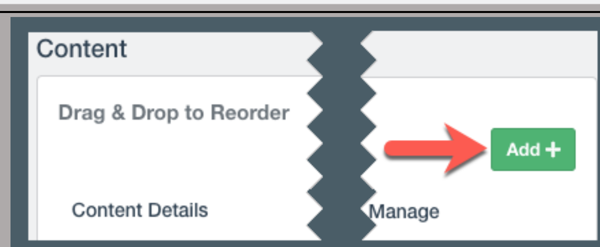
1	Select the type of Content you want to add. For this example, we'll add a Video.	
2	Fill in the Content Name, Content Label and Content Description fields and choose your video's location. For this example, we will click on 'My Computer'.	

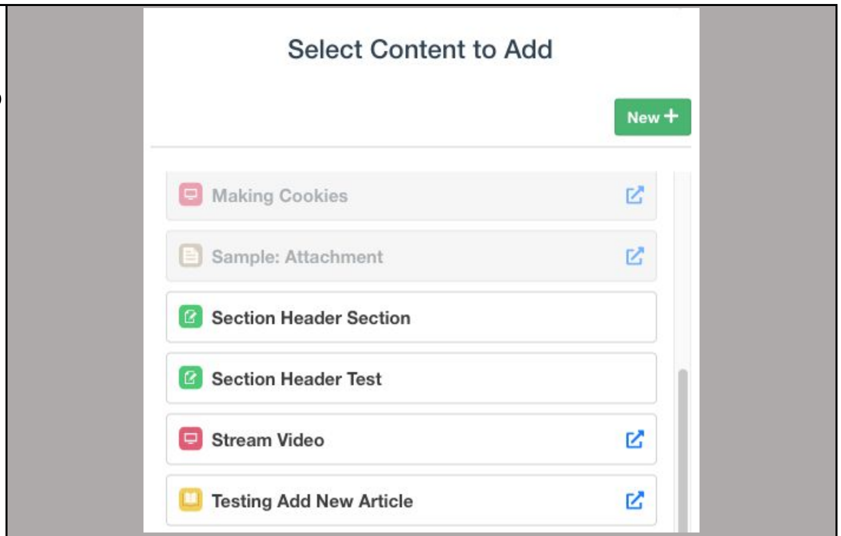
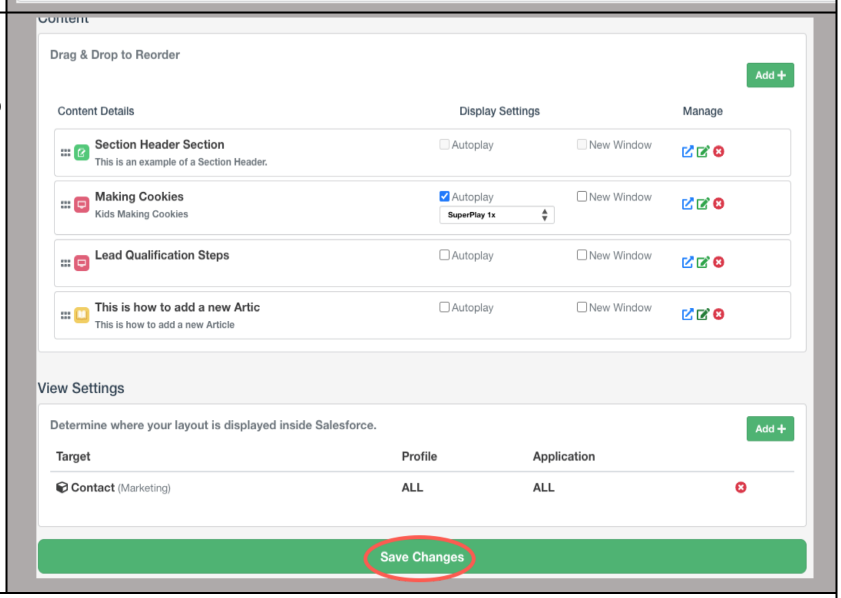
<table>
<tr>
<td>3</td>
<td>You will see the option to upload a file or type in the video’s URL.

For this example we will upload a file.</td>
<td>
</td>
</tr>
<tr>
<td>4</td>
<td>To upload a file, you have two options:

1. Drag & drop the file into the blue area.
2. Double click the blue area to search your files.

Click ‘Start Upload’.</td>
<td>
</td>
</tr>
<tr>
<td></td>
<td>When the upload has completed, click ‘Add Content’ at the bottom of the page.</td>
<td>
</td>
</tr>
</table>

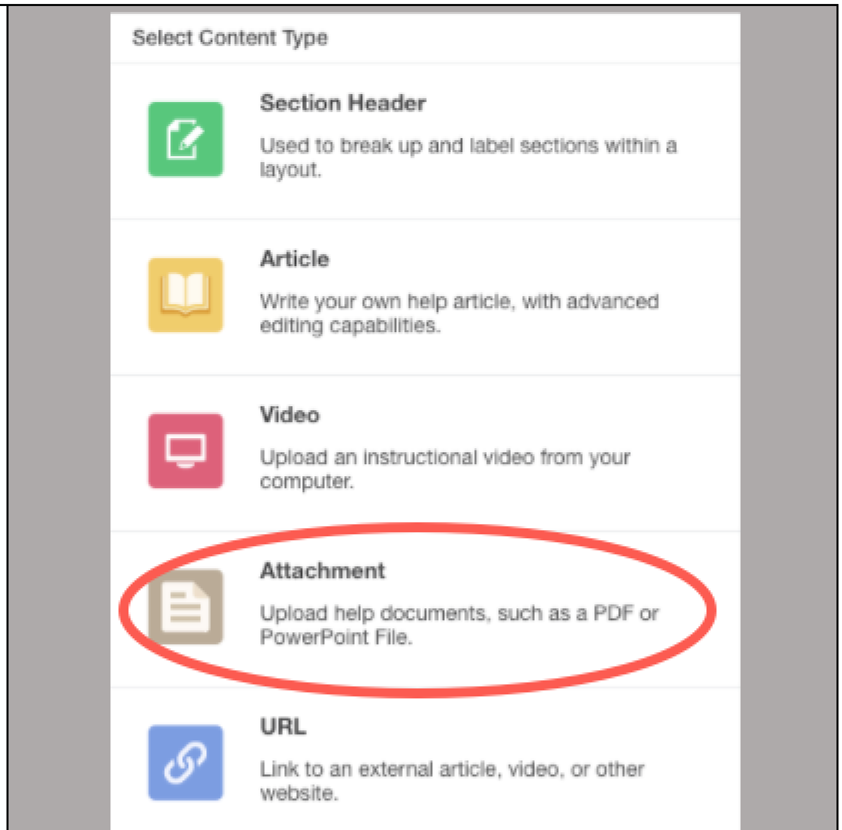
<table>
<tr><td>5</td><td>If you want to add a video using an external URL, paste the URL in the ‘External URL’ field, fill out the Content Name and details, and click ‘Add Content’.</td><td>
</td></tr>
<tr><td>6</td><td>You will now need to navigate back to the Layouts tab to add the new content to the layout.</td><td>
</td></tr>
<tr><td>7</td><td>Click “Details” of the layout where you would like to add the new content.</td><td>
</td></tr>
<tr><td>8</td><td>Click ‘Add’ to add content.</td><td>
</td></tr>
</table>

9	Choose and click the Content you want to add to your layout.	
10	You will now see your video has been added to the Content section of your Layout. You can click and drag to re-order the content components.	
11	After you add or reorder content, be sure to scroll to the bottom of the page to save your changes.	

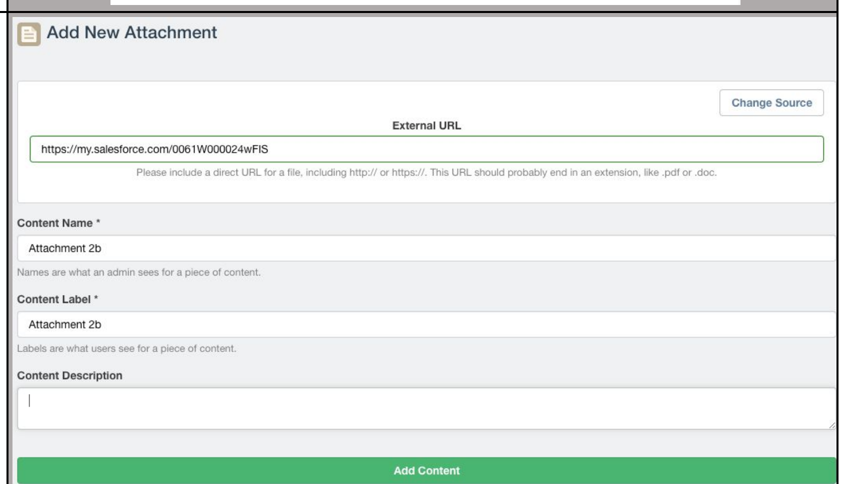
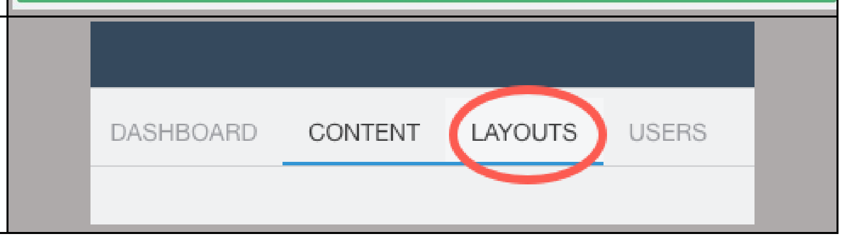
Step 3d: Add New Content: Attachment

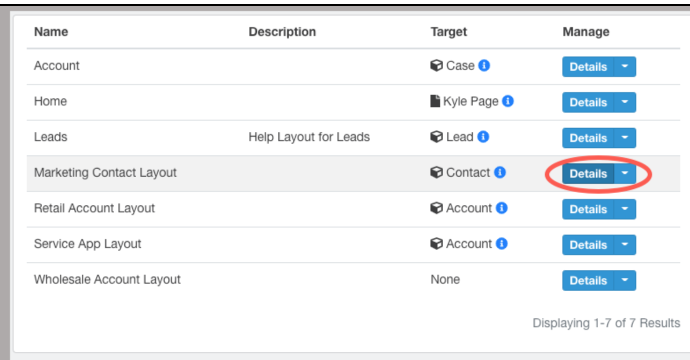
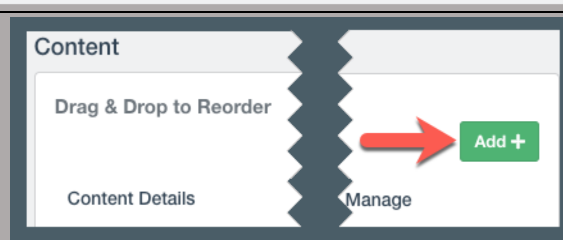
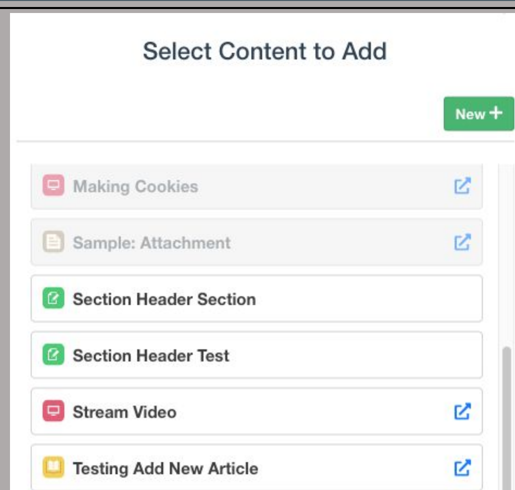
Digadop
Digital Adoption Platform

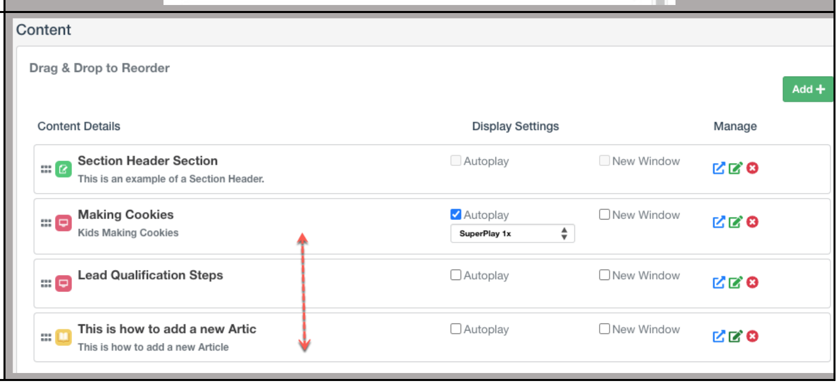
Stony Point

<table>
<tr><td>1</td><td>Select the type of Content you want to add. For this step, we’ll add an Attachment.</td><td>
</td></tr>
<tr><td>2</td><td>Paste the URL for the attachment in the ‘External URL’ field.

Fill out the Content Name, Content Label and Content Description fields.

Click ‘Add Content’.</td><td>
</td></tr>
<tr><td>3</td><td>You will now need to navigate back to the Layouts tab to add the new content to the layout.</td><td>
</td></tr>
</table>

<table>
<tr><td>4</td><td>Click “Details” of the layout where you would like to add the new content.</td><td>
</td></tr>
<tr><td>5</td><td>Click ‘Add’ to add content.</td><td>
</td></tr>
<tr><td>6</td><td>Choose and click the Content you want to add to your layout.</td><td>
</td></tr>
<tr><td>7</td><td>You will now see your Article has been added to the Content section of your Layout.

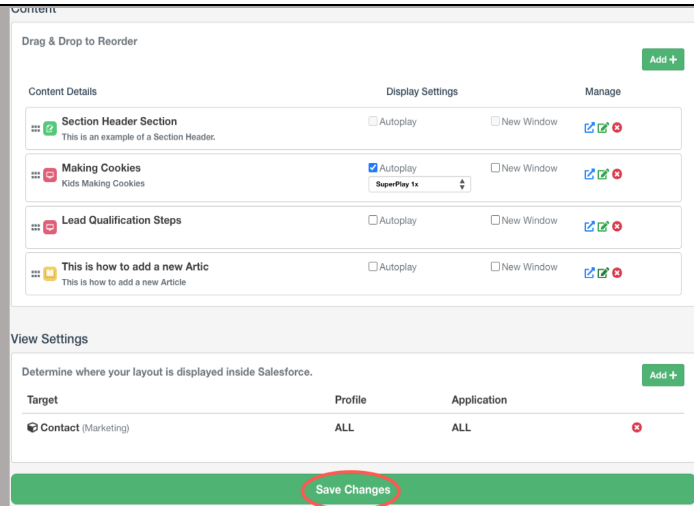
You can click and drag to reorder the content components.</td><td>
</td></tr>
</table>

Digadop
Digital Adoption Platform

Stony Point

8

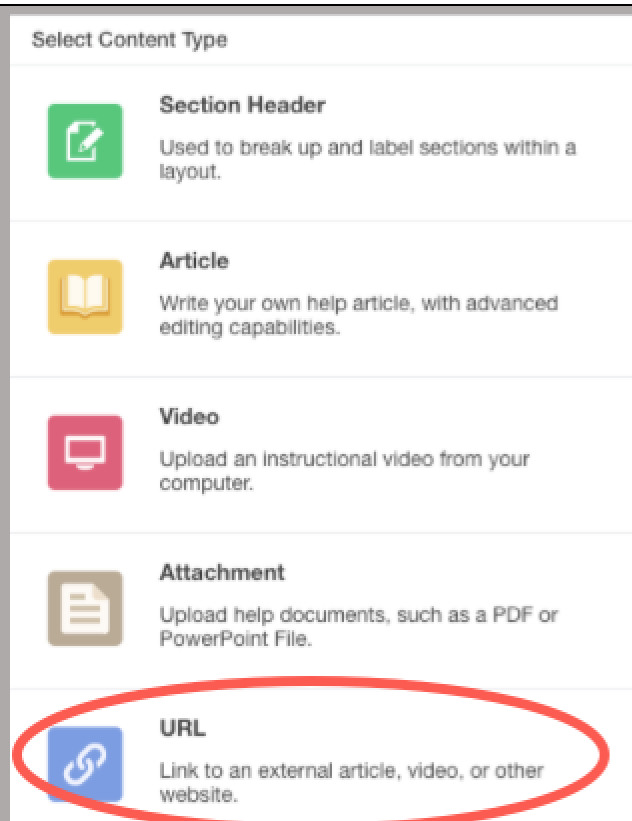
After you add or reorder content, be sure to scroll to the bottom of the page to save your changes.

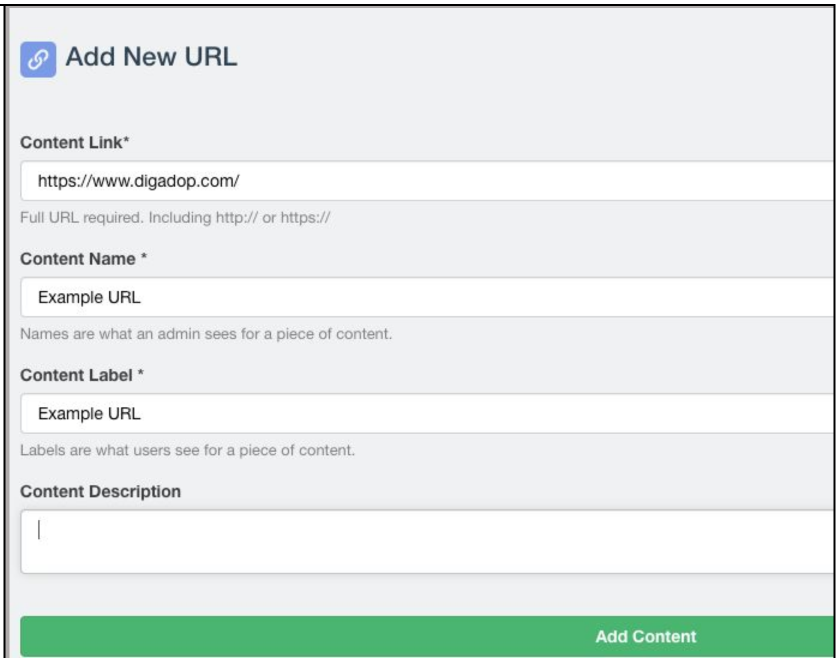
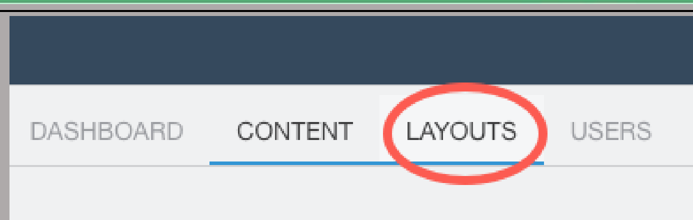
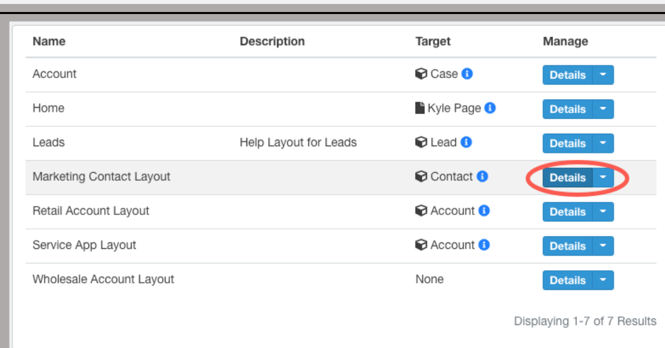
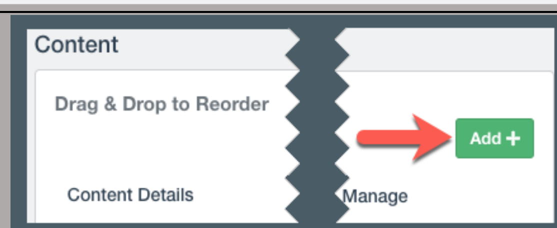


Step 3e: Add New Content: URL

1

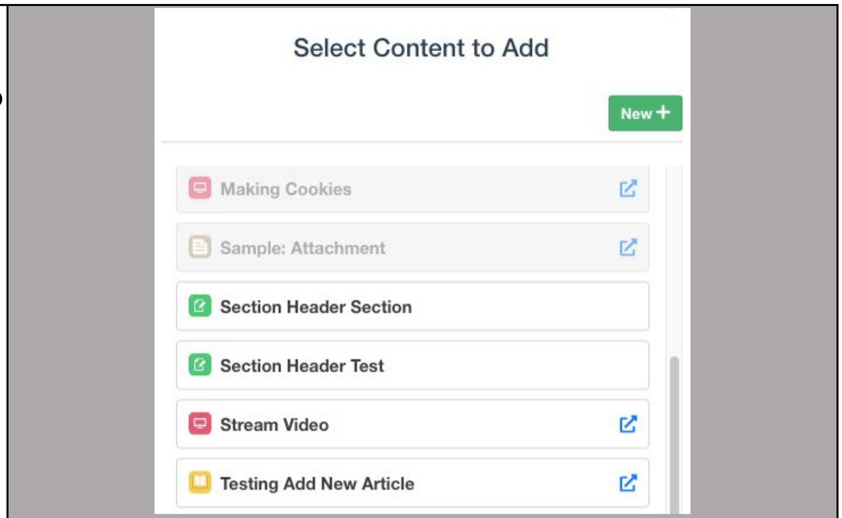
Select the type of Content you want to add. For this step, we'll add a URL.

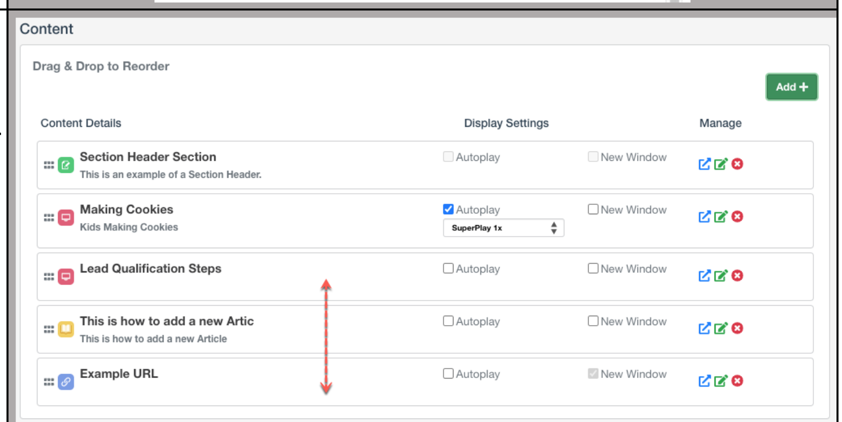
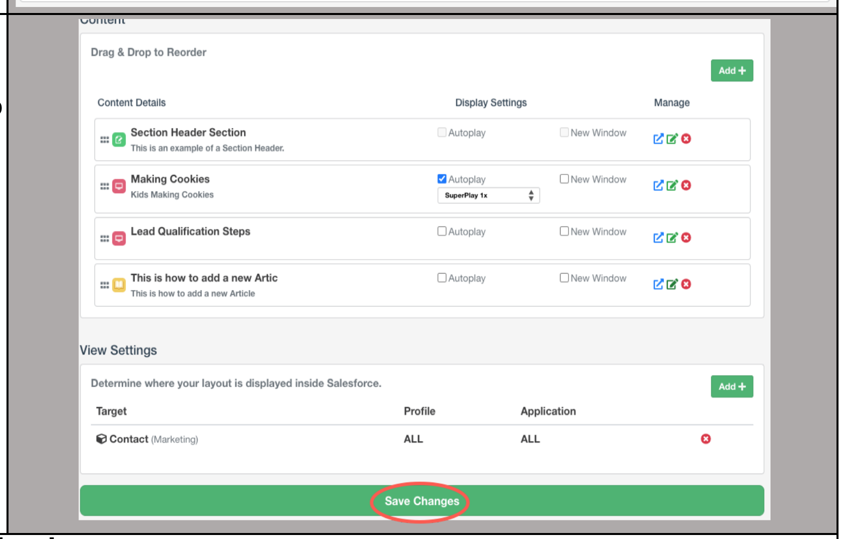


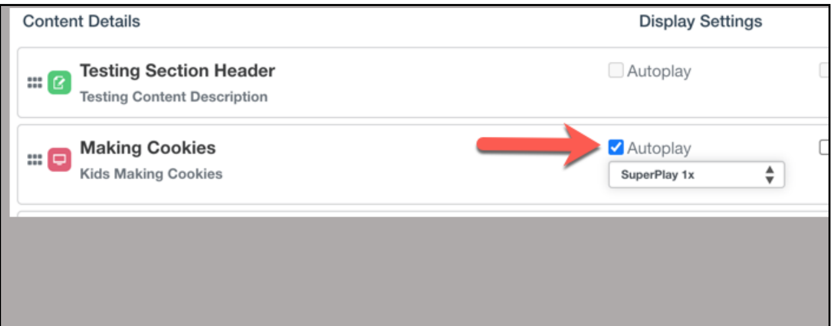
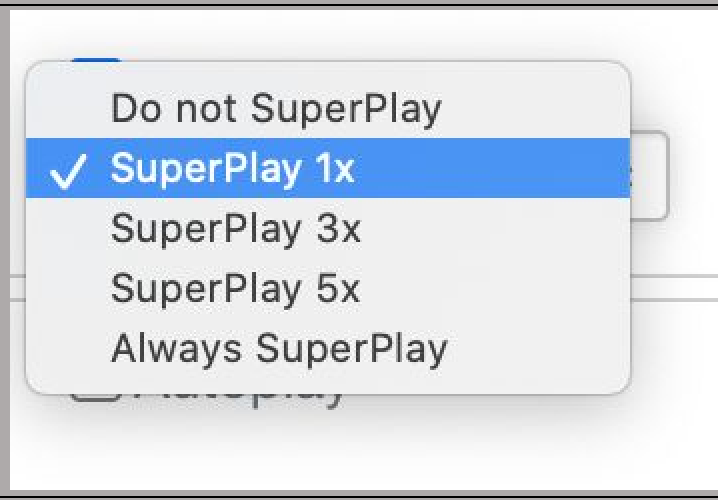
2	Paste the URL in the Content Link field. Fill in the Content Name, Content Label and Content Description fields. Click ‘Add Content’.	
3	You will now need to navigate back to the Layouts tab to add the new content to the layout.	
4	Click “Details” of the layout where you would like to add the new content.	
5	Click ‘Add’ to add content.	

Digadop
Digital Adoption Platform

Stony Point

<table>
<tr>
<td>6</td>
<td>Choose and click the Content you want to add to your layout.</td>
<td>
</td>
</tr>
<tr>
<td>7</td>
<td>You will now see your Article has been added to the Content section of your Layout.

You can click and drag to reorder the content components.</td>
<td>
</td>
</tr>
<tr>
<td>8</td>
<td>After you add or reorder content, be sure to scroll to the bottom of the page to save your changes.</td>
<td>
</td>
</tr>
<tr>
<td colspan="3">Step 3f: Set Autoplay and other Settings</td>
</tr>
</table>

<table>
<tr><td>1</td><td>When Autoplay is selected for a piece of content, the content will open (and start playing automatically if it's a video) when the 'DigadopHelp' button is clicked.</td><td>
</td></tr>
<tr><td>2</td><td>When a Superplay option is selected for a piece of content, the Help Content Layout will automatically open upon navigation to the record page (no need to click the 'Digadop Help' button.) The content will open (and start playing automatically if it's a video) for the number of times you have selected.</td><td>
</td></tr>
<tr><td>3</td><td>Checking 'New Window' will cause the content to open in a new window.</td><td>
</td></tr>
</table>

Step 4: Add View Settings

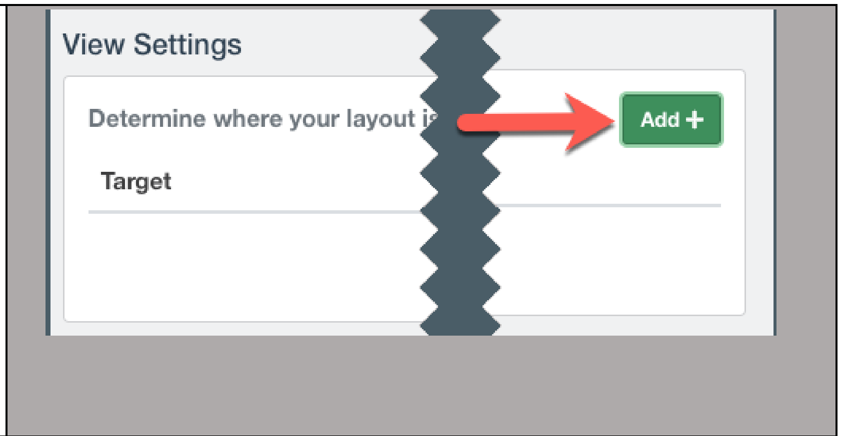
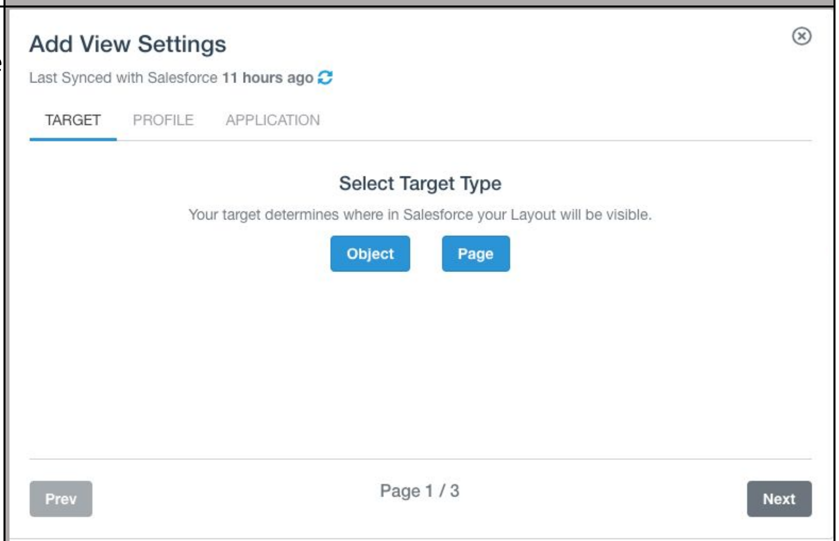
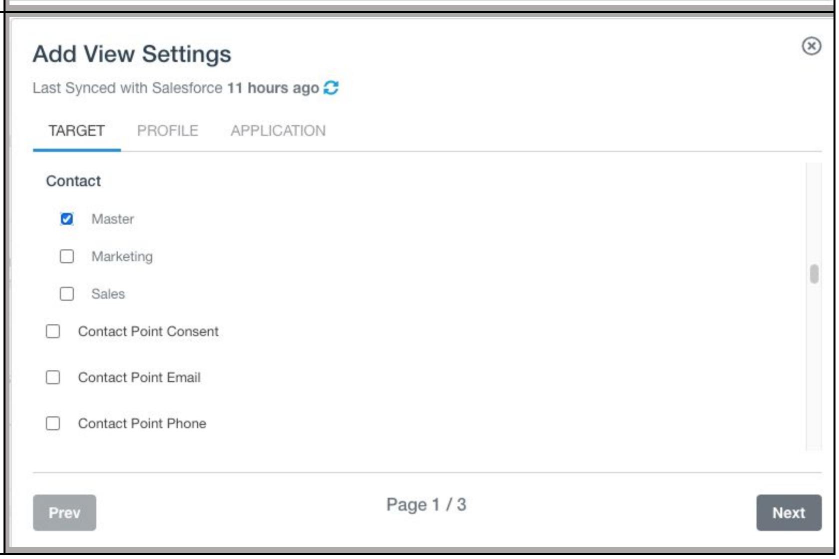
In this step you will add view settings for your layout.

Prerequisites:

- *Must be a Digadop Admin*

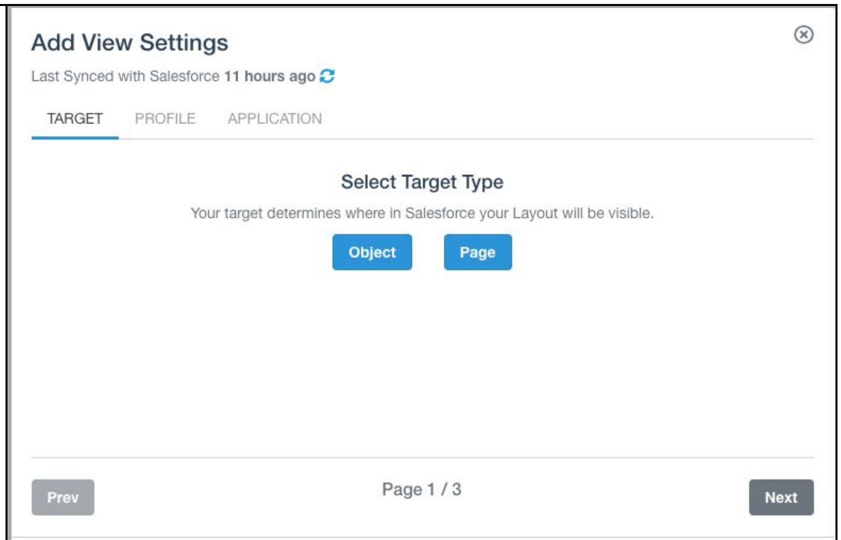
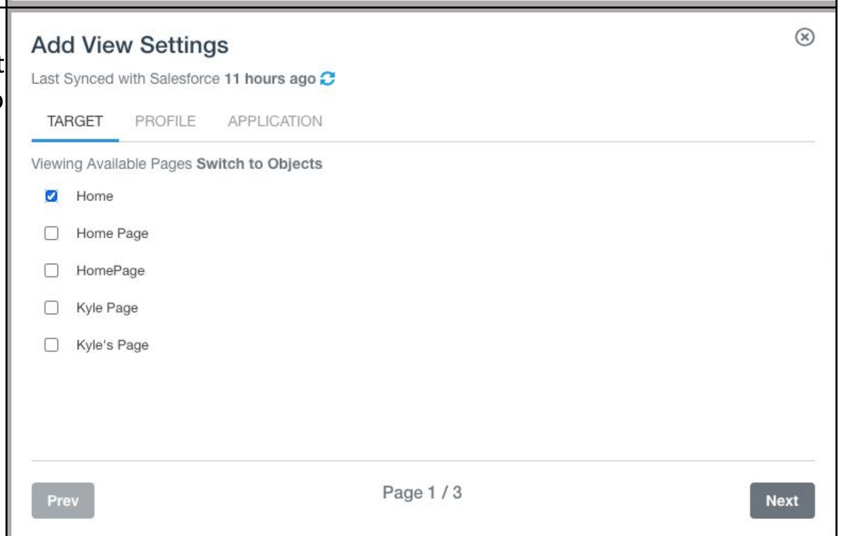
Digadop
Digital Adoption Platform

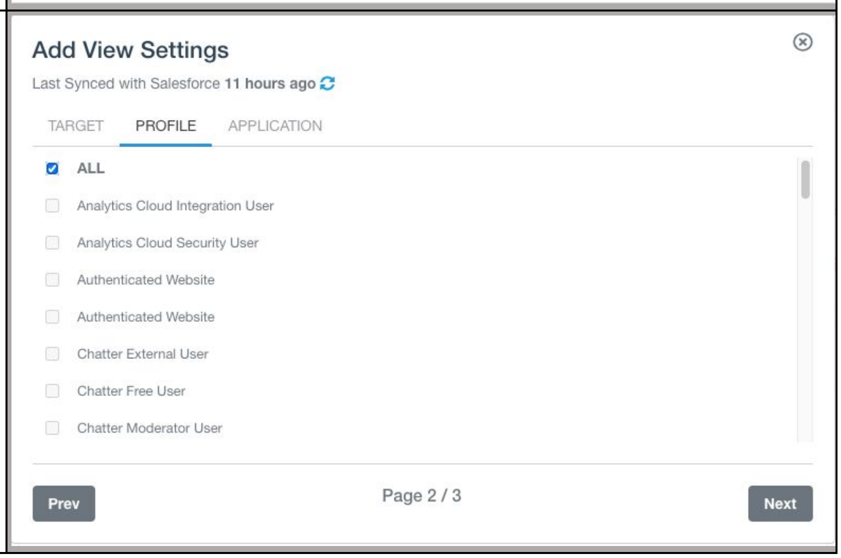
Stony Point

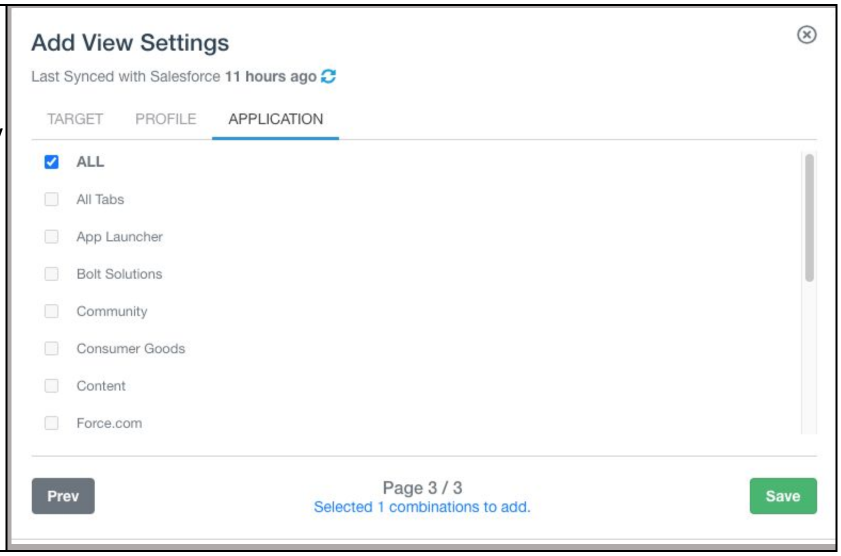
1	View Settings allow you to specify which Users have access to your Help Content Layout. Access is determined based on Object (or page), Profile and Application. From the 'View Settings' section, click 'Add'.	
2	First, you will choose where to display your layout. Click on the 'Target' tab. You can display for a particular object or page. For our example, we will select 'Object'.	
3	Scroll down the page to find the Contact object. If the object has more than one record type, you will see them displayed here. You will be able to select multiple record types if you wish.	

Digadop
Digital Adoption Platform

Stony Point

<table>
<tr><td>4</td><td>If you wanted to display your Help Content Layout on a non-object page such as the Home page, you would select ‘Page’.</td><td>
</td></tr>
<tr><td>5</td><td>From here you would select the page where you wish to display.</td><td>
</td></tr>
<tr><td>6</td><td>Next, click on the ‘Profile’ tab.

From here you are able to specify which Profiles are able to see the layout.</td><td>
</td></tr>
</table>

7	Next, click on the 'Application' tab. From here you are able to specify which Applications you would like to display your layout. When you are finished, click 'Save'.	

8	Congratulations! You have just created your first Help Content Layout. Here’s an example of what it might look like displayed on your Lightning record page. Test your work! Return to your org, refresh the Contact page you selected earlier and click on “Help”