

DIGADOP HELP GETTING STARTED GUIDE

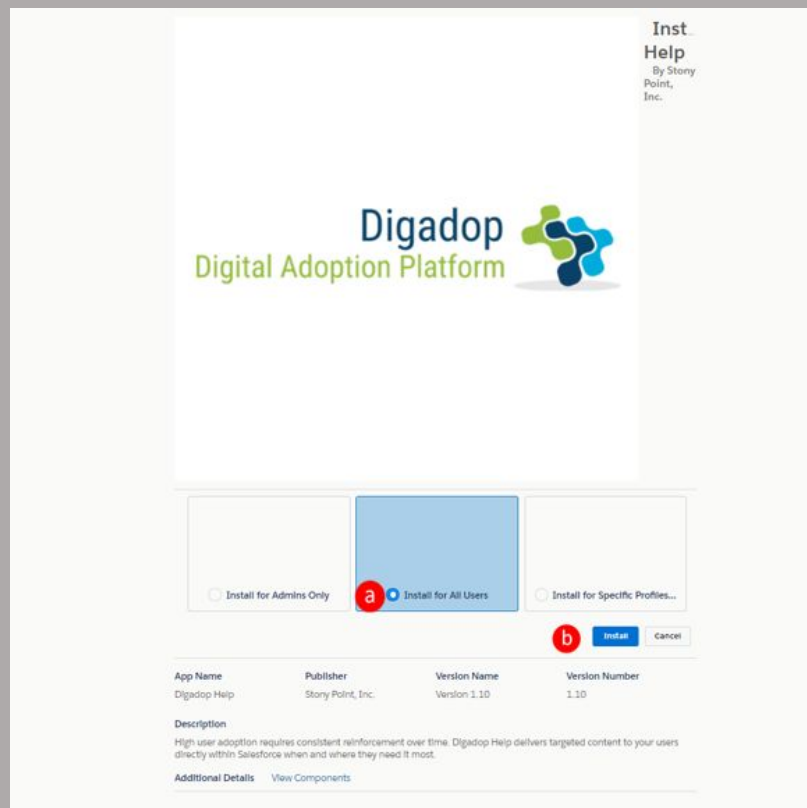
Step 1: Install Digadop from the AppExchange

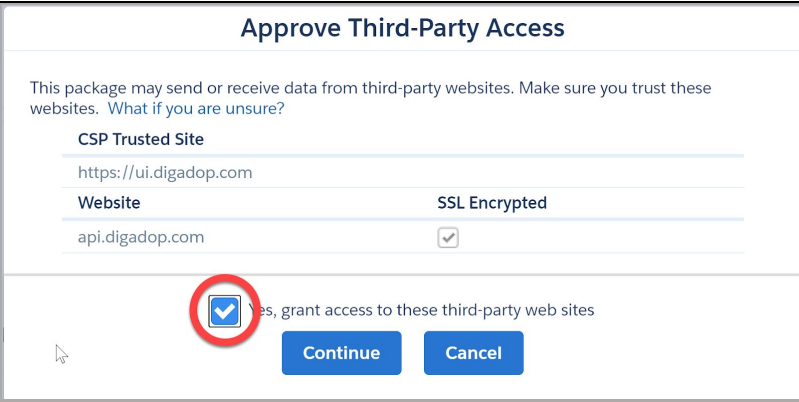
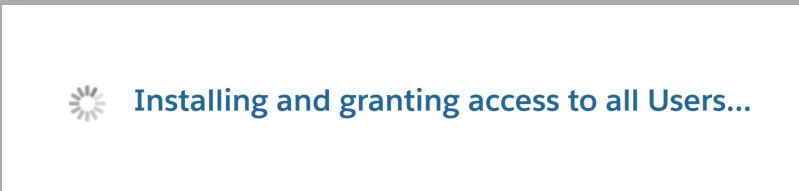
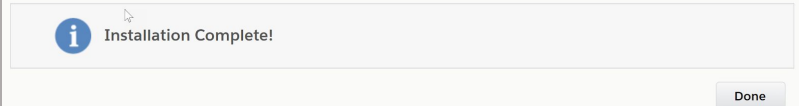
Prerequisites: Must be a System Administrator

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"	

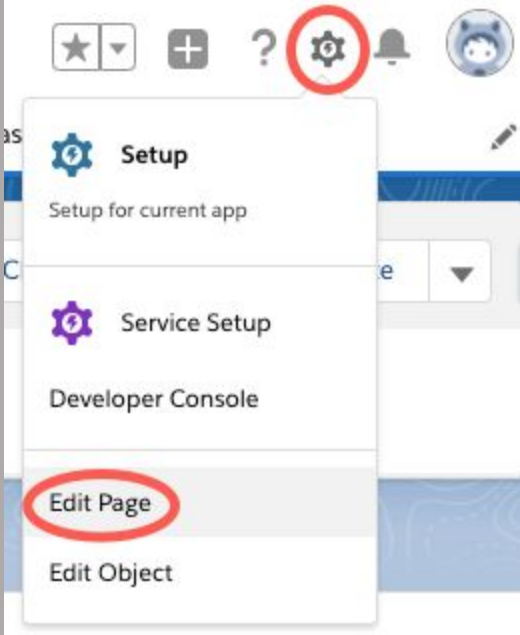
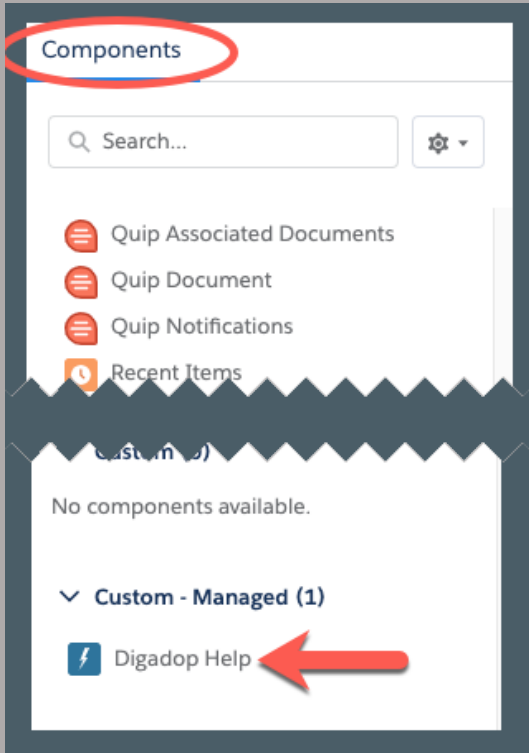
Step 2: Add the Digadop Help Button to Lightning Record Pages

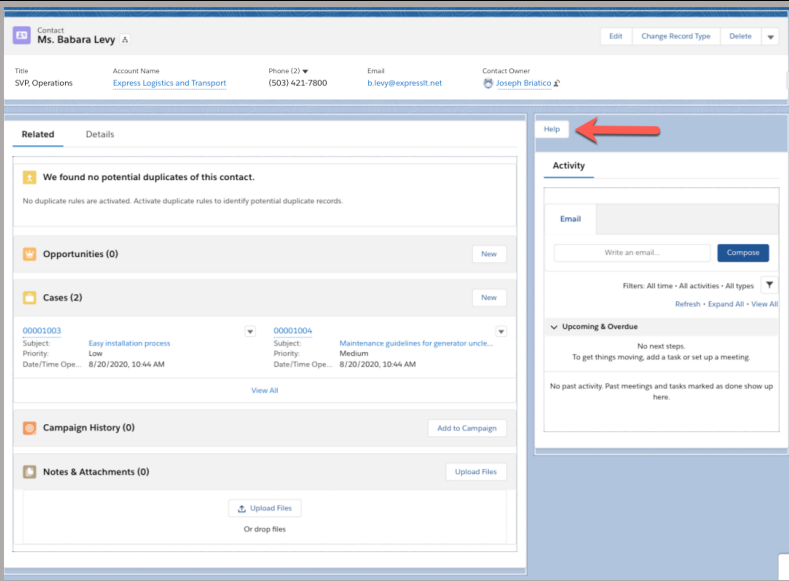
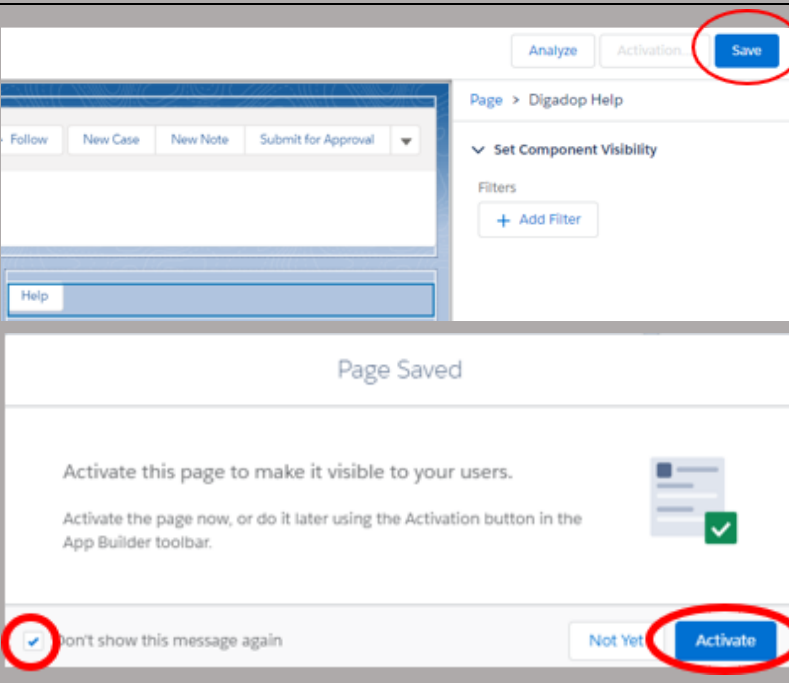
The Digadop 'Help' button gives you an easy way to access help content designed specifically for a certain page, right from that page!

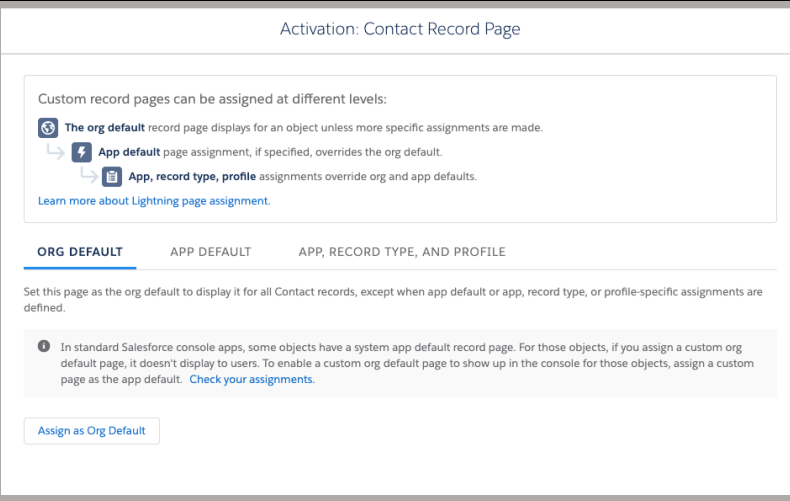
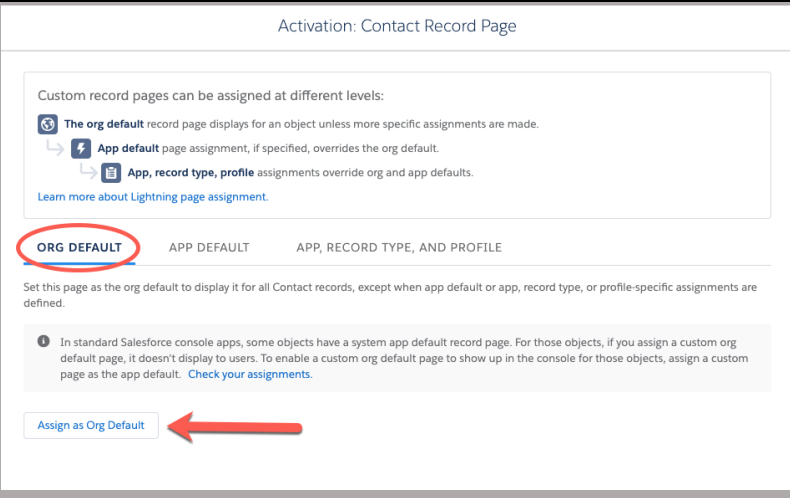
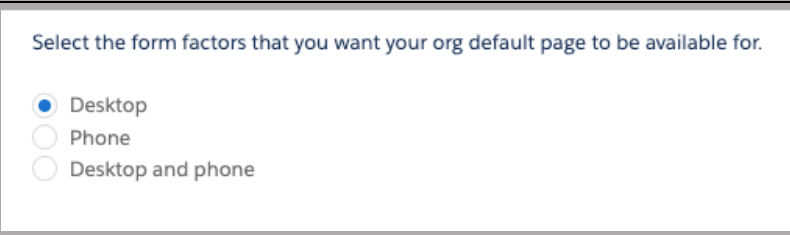
Prerequisites:

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

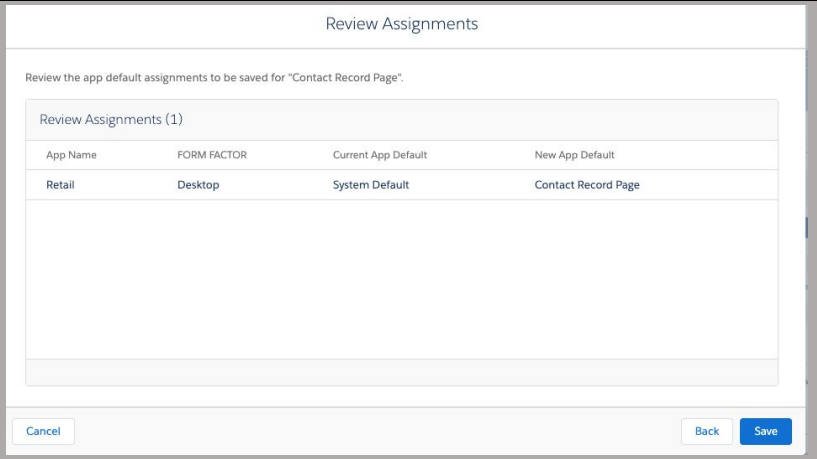
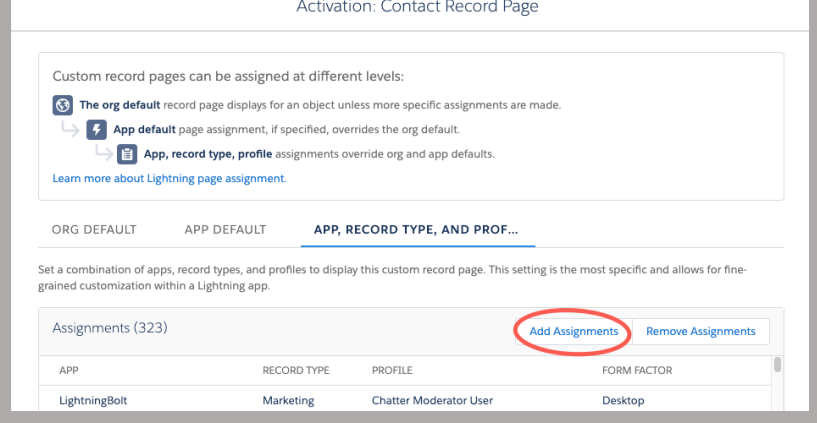
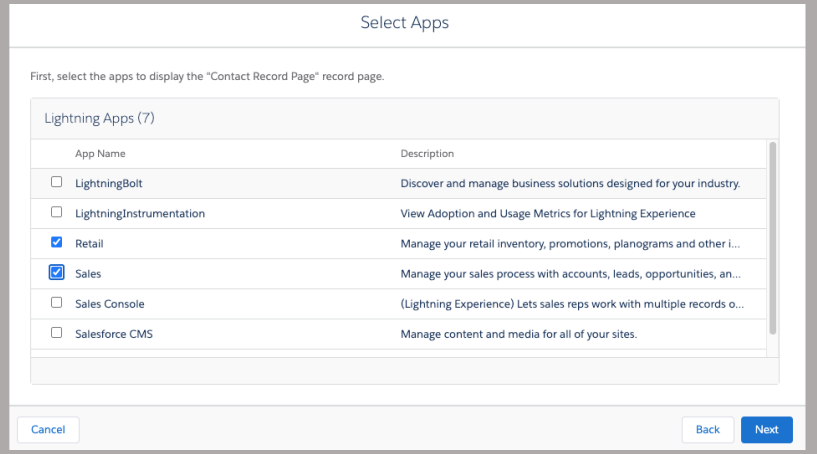
1	Let's walk through adding the Digadop Help button to a Contact record page. Navigate to a Contact record page where you would like the button to appear.	
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	Click the gear icon, then click 'Edit Page'.	
2	Locate the 'Digadop Help' button. You'll find the button in the Components area in the 'Custom - Managed' section (bottom left-hand corner.)	
3	Click and drag the	

	'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.	

5	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.	
	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.	
6	Option 1: Org Default To activate this page for all Users with no restrictions, choose 'Assign as Org Default' from the ORG DEFAULT tab.	
7	Next, choose the form factors for your Org Default page.	

8	Review your assignment and click 'Save'. Jump to Step 19.	
9	Option 2: App Default Assigning as the app default will make your page the default page for the app(s) you select.	
10	Select the apps where you would like to display your page as the app default.	
11	Next, choose the form factors for your App Default page.	

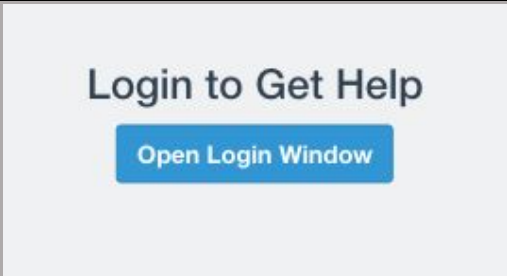
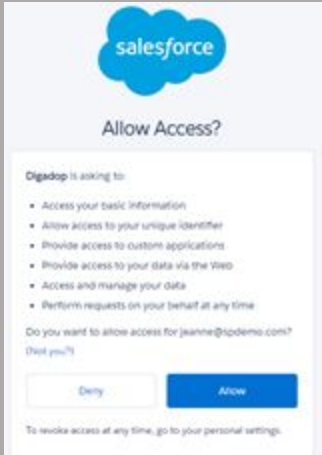
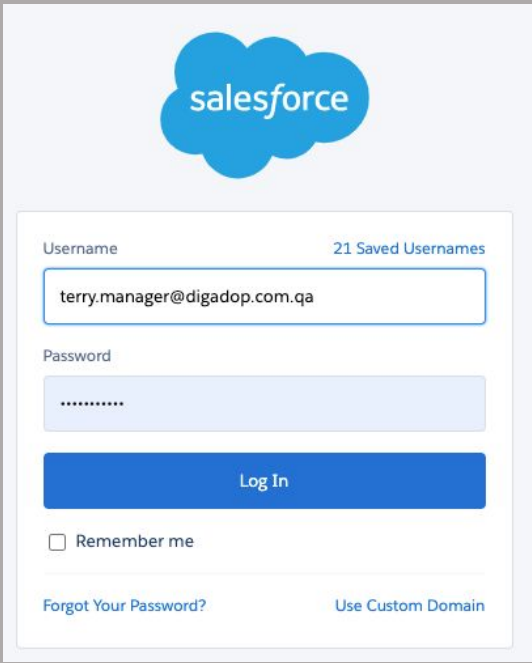
12	Review your assignments and click 'Save'. Jump to Step 19.	
13	Option 3: Assign based on App, Record Type and Profile For more specific page assignment of your page, select the 'App, Record Type and Profile' tab. Click 'Add Assignments'.	
14	Select which apps will display your Lightning record page.	

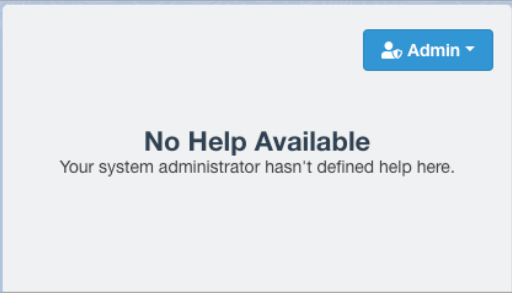
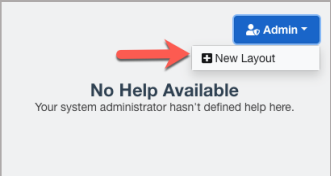


15	For each of the apps you have chosen, select the form factor you want for the page.	Select Form Factor For each app, select the form factor that you want the page to apply to. Lightning Apps (2) <table><thead><tr><th>App Name</th><th>FORM FACTOR</th></tr></thead><tbody><tr><td>Retail</td><td>☒ Desktop</td></tr><tr><td>Sales</td><td>☒ Desktop and phone ☐ Desktop ☐ Phone</td></tr></tbody></table> Cancel Back Next	App Name	FORM FACTOR	Retail	☒ Desktop	Sales	☒ Desktop and phone ☐ Desktop ☐ Phone								
App Name	FORM FACTOR															
Retail	☒ Desktop															
Sales	☒ Desktop and phone ☐ Desktop ☐ Phone															
16	Choose which record types to display your page.	Selected Record Types Select the record types to display the "Contact Record Page" record page. Record Types (3) 1 Selected <table><thead><tr><th>RECORD TYPE</th><th>Description</th></tr></thead><tbody><tr><td>☒ Master</td><td></td></tr><tr><td>☐ Marketing</td><td></td></tr><tr><td>☐ Sales</td><td></td></tr></tbody></table> Cancel Back Next	RECORD TYPE	Description	☒ Master		☐ Marketing		☐ Sales							
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17	Choose which Profiles to display your page.	Selected Profiles Select the profiles to display the "Contact Record Page" record page. Profiles (48) 1 Selected <table><thead><tr><th>PROFILE</th><th>Description</th></tr></thead><tbody><tr><td>☐ Silver Partner User</td><td></td></tr><tr><td>☐ Solution Manager</td><td></td></tr><tr><td>☐ Standard Platform User</td><td></td></tr><tr><td>☒ Standard User</td><td></td></tr><tr><td>☐ System Administrator</td><td></td></tr><tr><td>☐ Work.com Only User</td><td></td></tr></tbody></table> Cancel Back Next	PROFILE	Description	☐ Silver Partner User		☐ Solution Manager		☐ Standard Platform User		☒ Standard User		☐ System Administrator		☐ Work.com Only User	
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18	Review your assignments and click 'Save'.	Review Assignments Review the app, record type, profile and form factor combinations that will display the "Contact Record Page" record page. Review Assignments (3) <table><tr><th>APP</th><th>RECORD TYPE</th><th>PROFILE</th><th>FORM FACTOR</th><th>Current Page</th><th>New Page</th></tr><tr><td>Retail</td><td>Master</td><td>Standard User</td><td>Desktop</td><td>System Default</td><td>Contact Record Page</td></tr><tr><td>Sales</td><td>Master</td><td>Standard User</td><td>Desktop</td><td>System Default</td><td>Contact Record Page</td></tr><tr><td>Sales</td><td>Master</td><td>Standard User</td><td>Phone</td><td>System Default</td><td>Contact Record Page</td></tr></table> Cancel Back Save	APP	RECORD TYPE	PROFILE	FORM FACTOR	Current Page	New Page	Retail	Master	Standard User	Desktop	System Default	Contact Record Page	Sales	Master	Standard User	Desktop	System Default	Contact Record Page	Sales	Master	Standard User	Phone	System Default	Contact Record Page
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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)	Analyze Activation... Save ← Lightning App Builder Pages ▾ Contact Record Page																								
20	Click the new 'Digadop Help' button on your Contact record page.	Edit Change Record Type Delete ▼ Contact Owner Joseph Briatico Help Activity Email Write an email... Compose																								
21	The first time you click the 'Digadop Help' button, you will be prompted to login.																									



	Click 'Open Login Window'.	
22	Next, you will see the "Allow Access" screen. Click "Allow" Next is the login screen. If you have multiple Salesforce logins, please ensure you are logging in with the correct username.	 
23		

	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. <i>Prerequisites:</i> • <i>Must be a Digadop Admin</i>		
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.	

		Layout Details Label * Retail Account - Sales Rep This appears at the top of your layout. 100 characters max. Name * Retail Account - Sales Rep This is what the Layout is identified by in the admin dashboard. 100 characters max. Description This Layout appears for Record Type: Retail Account, Profile: Sales Rep, on all Applications. This appears underneath your title. 256 characters max. Add Layout
3	Add Content to Digadop, you can either 1. Click the 'Add' button in the Content section.	Content Drag & Drop to Reorder Content Details Manage Add +

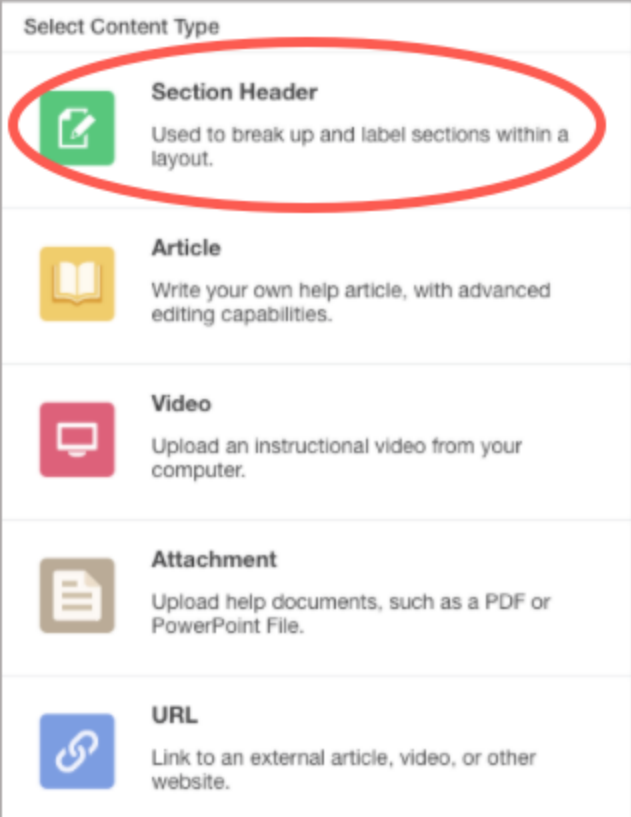
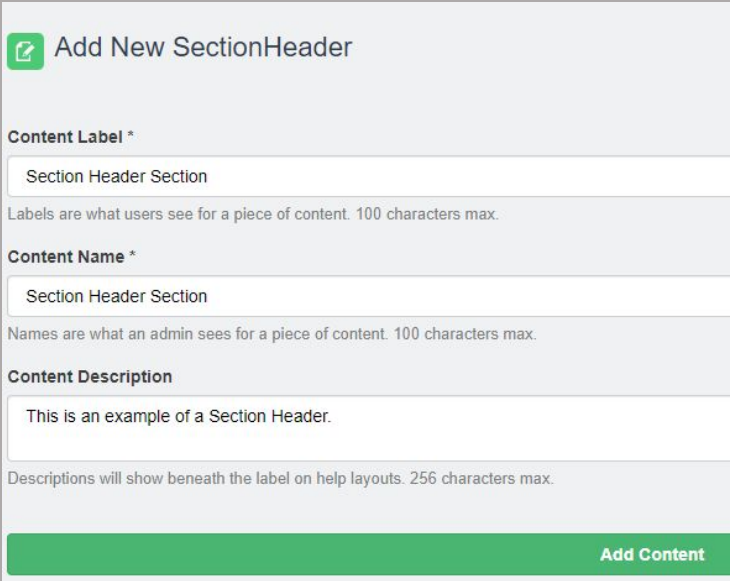
From here you can choose from existing Content or add New Content. To add New Content, Click the 'New' button to add new content to your layout.

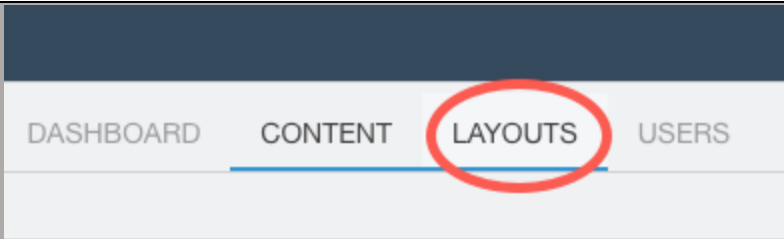
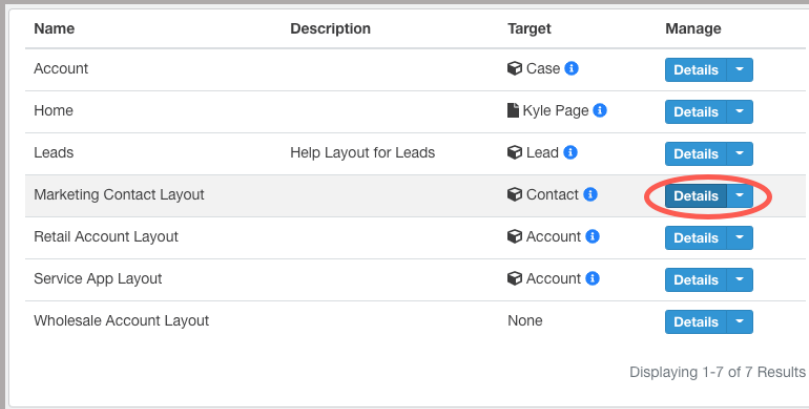
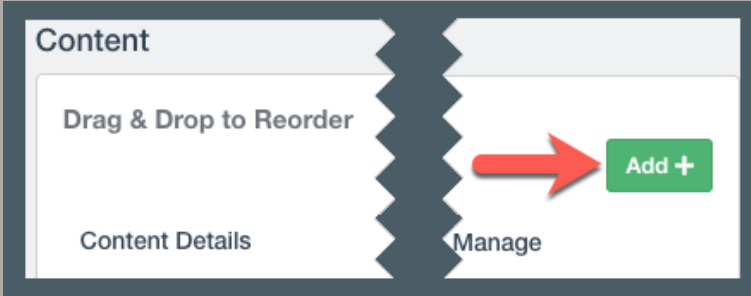
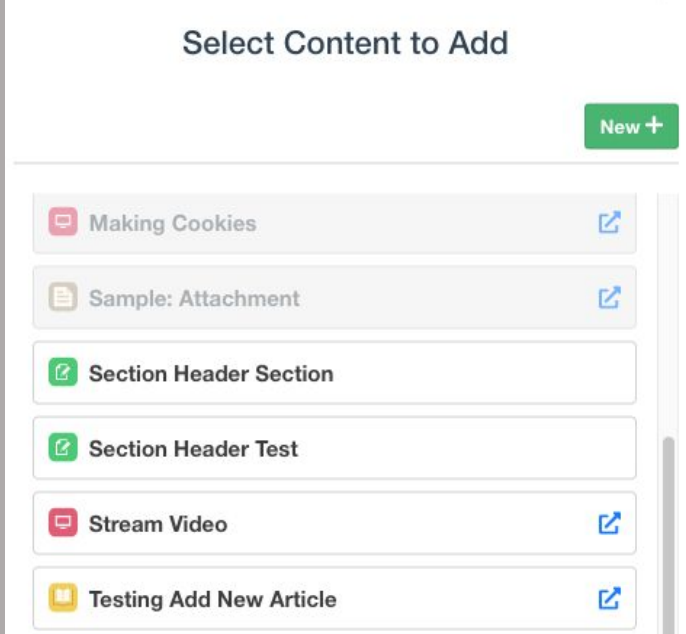
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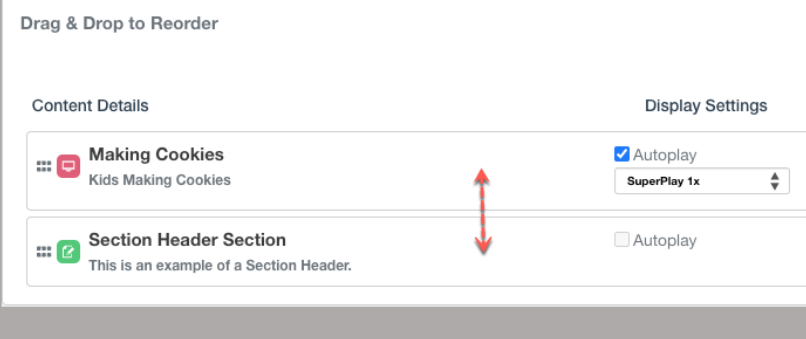
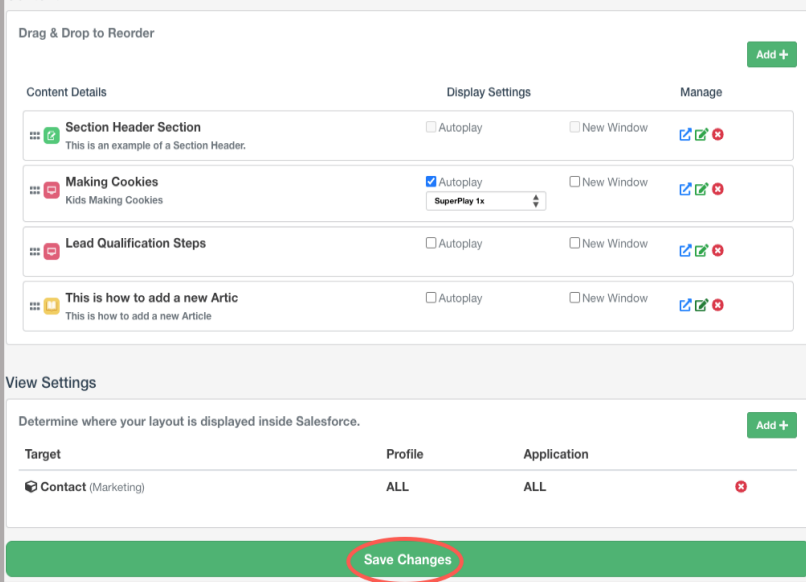
2. Go to the Content tab.

The screenshot displays the Digadop user interface. At the top, a modal titled "Select Content to Add" is open, showing a list of content items: "Homer", "Making Cookies", "Sample: Attachment", "Test Upload", and "YouTube Video". A red arrow points to a green "New +" button in the top right corner of the modal. Below the modal, the main dashboard is visible. The "CONTENT" tab is highlighted with a red circle in the navigation bar, which also includes "DASHBOARD", "LAYOUTS", "USERS", "REPORTS", and "CC". The "Content" section header is visible, along with an "Add Content" button and a description: "Manage the videos, attachments, and articles that make up your layouts." A search bar and a filter dropdown are also present at the bottom of the content section.

Step 3a: Add New Content: Section Header

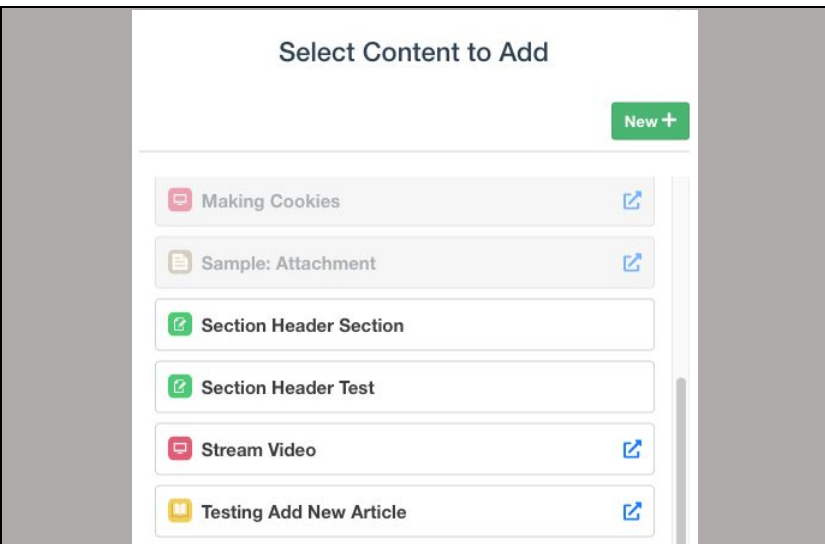
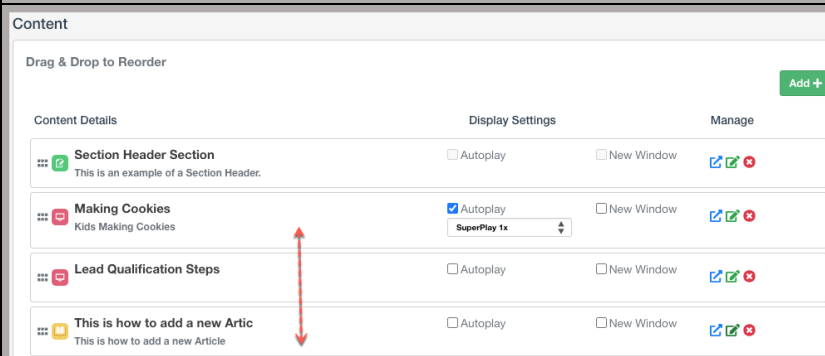
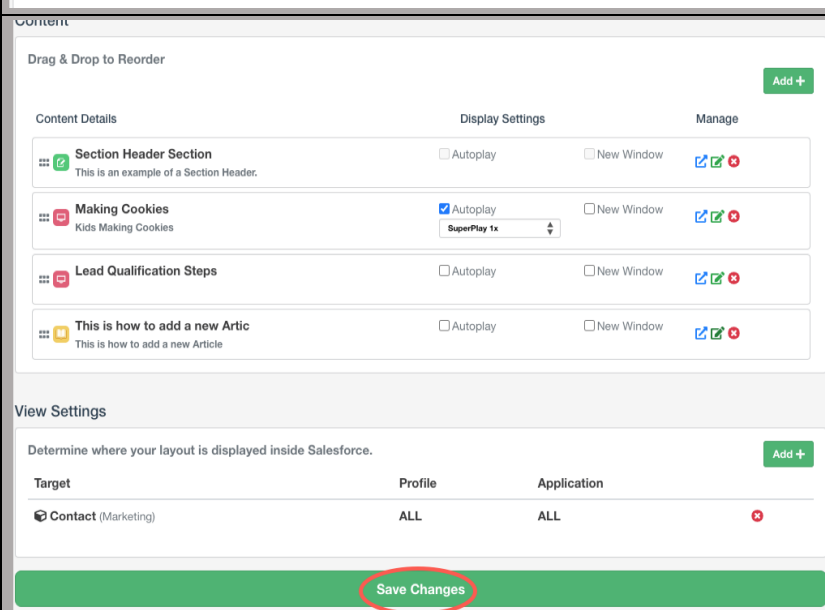
1	Select the type of Content you want to add. For this step, we'll add a Section Header.	
2	Fill out the required fields and click 'Add Content' to save your changes.	

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.	 <table><thead><tr><th>Name</th><th>Description</th><th>Target</th><th>Manage</th></tr></thead><tbody><tr><td>Account</td><td></td><td>Case 1</td><td>Details</td></tr><tr><td>Home</td><td></td><td>Kyle Page 1</td><td>Details</td></tr><tr><td>Leads</td><td>Help Layout for Leads</td><td>Lead 1</td><td>Details</td></tr><tr><td>Marketing Contact Layout</td><td></td><td>Contact 1</td><td>Details</td></tr><tr><td>Retail Account Layout</td><td></td><td>Account 1</td><td>Details</td></tr><tr><td>Service App Layout</td><td></td><td>Account 1</td><td>Details</td></tr><tr><td>Wholesale Account Layout</td><td></td><td>None</td><td>Details</td></tr></tbody></table> Displaying 1-7 of 7 Results	Name	Description	Target	Manage	Account		Case 1	Details	Home		Kyle Page 1	Details	Leads	Help Layout for Leads	Lead 1	Details	Marketing Contact Layout		Contact 1	Details	Retail Account Layout		Account 1	Details	Service App Layout		Account 1	Details	Wholesale Account Layout		None	Details
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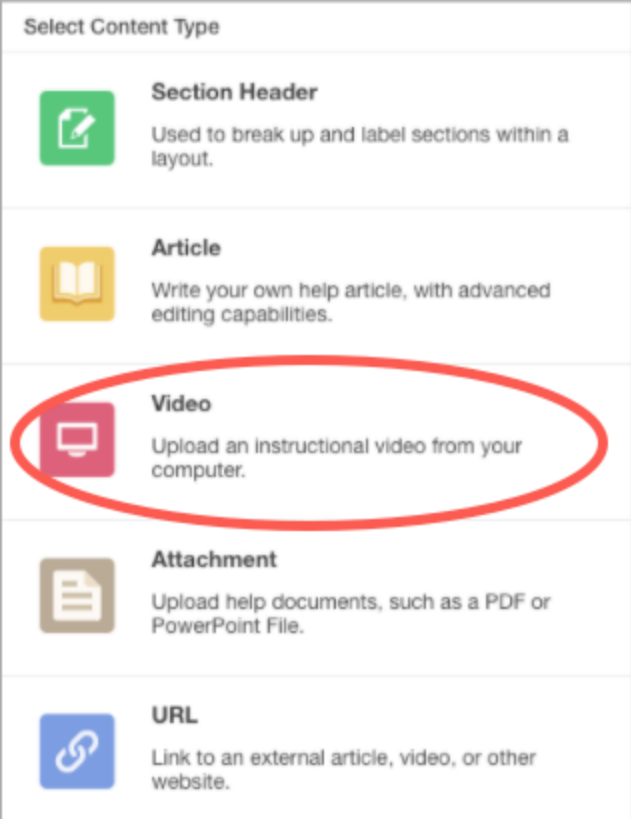
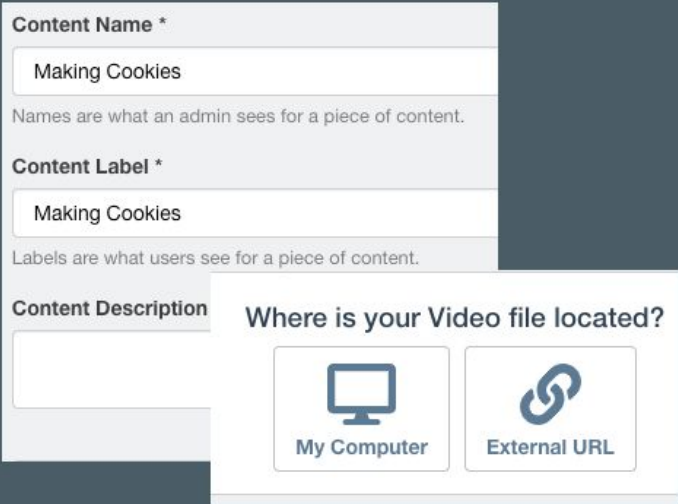
7	You will now see your Section Header has been added to the Content section of your Layout. You can click and drag to reorder the content components.	
8	After you add or reorder content, be sure to scroll to the bottom of the page to save your changes.	
Step 3b: Add New Content: Article		

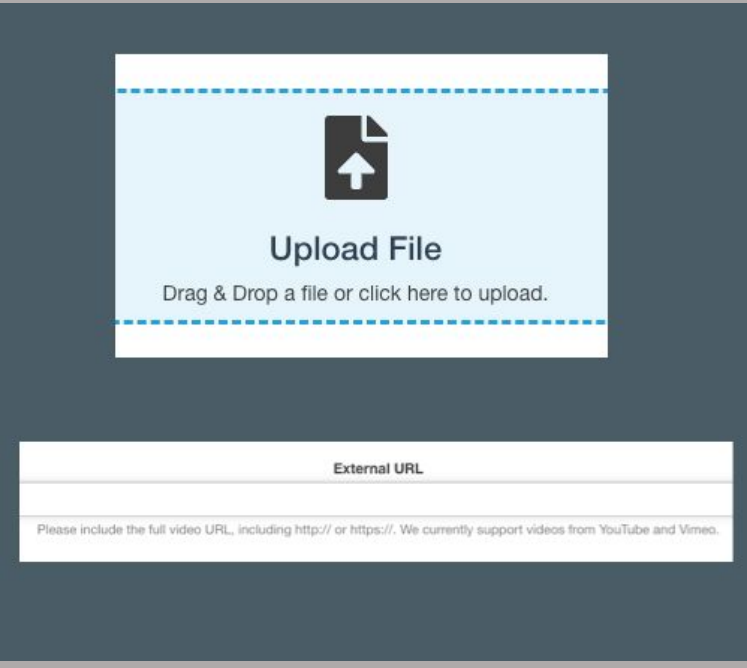
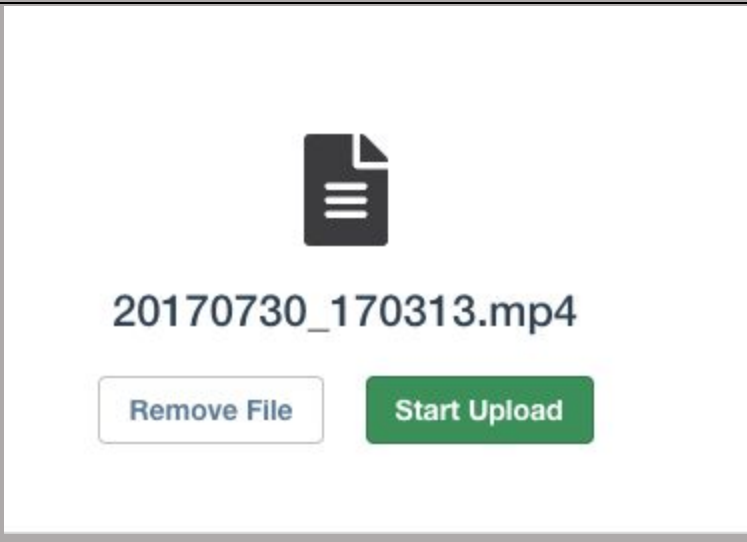
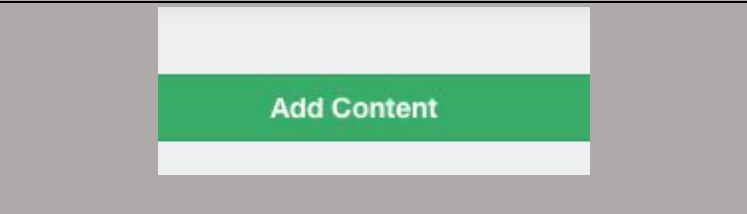
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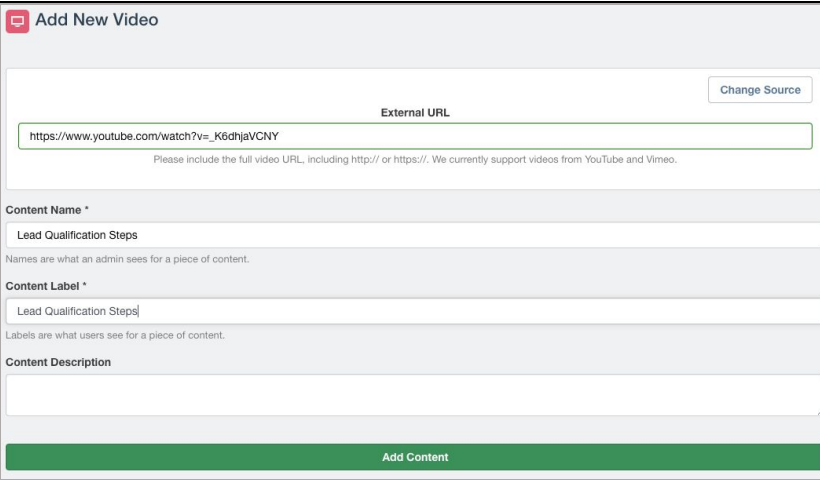
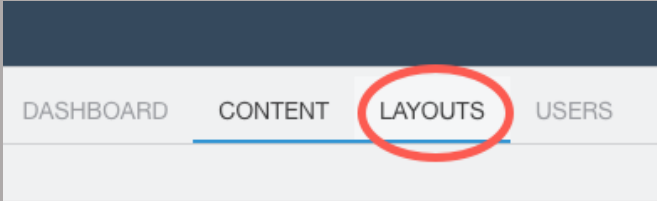
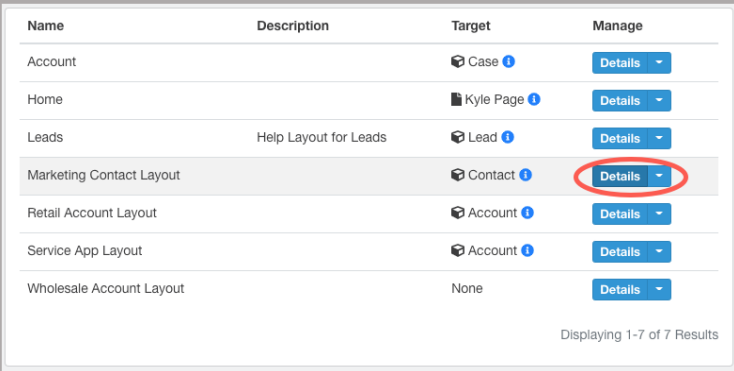
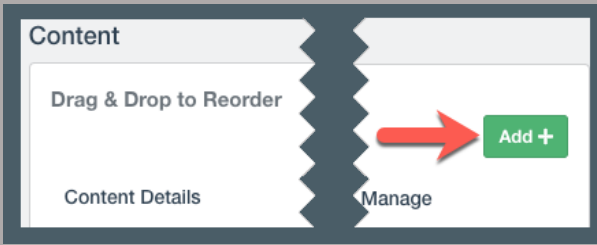
3	Fill out the Content Name, Content Label and Content Description fields. Click 'Add Content'.	Content Label * This is how to add a new Article Labels are what users see for a piece of content. 100 characters max. Content Name * This is how to add a new Article Names are what an admin sees for a piece of content. 100 characters max. Content Description This is how to add a new Article Descriptions will show beneath the label on help layouts. 256 characters max. Add Content																																
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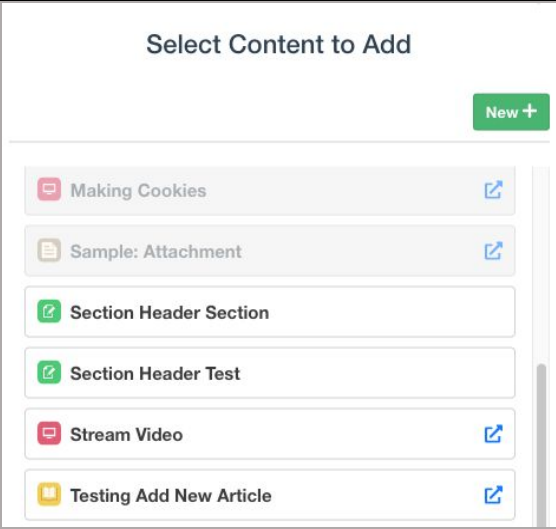
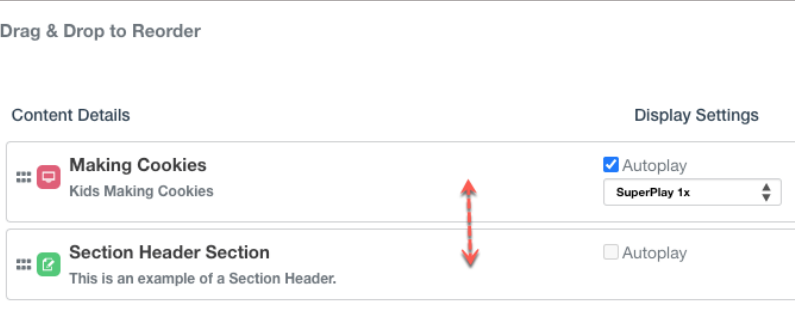
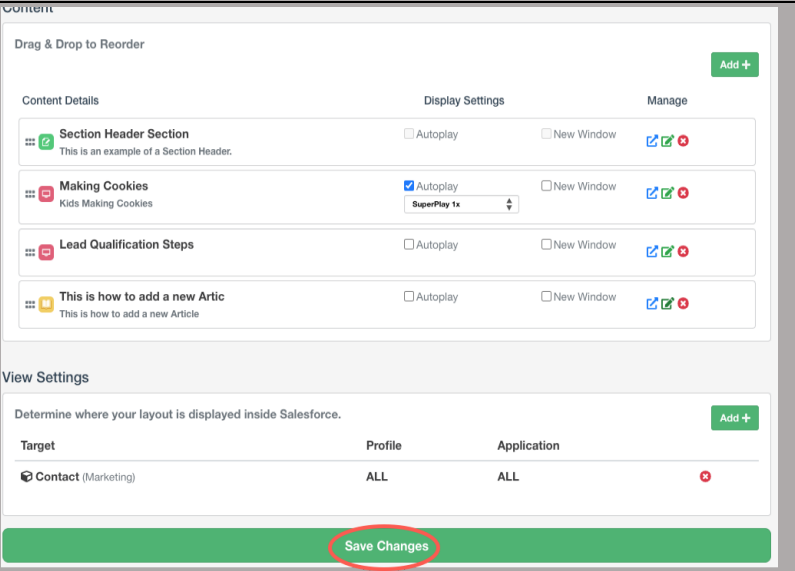
7	Choose and click the Content you want to add to your layout.	
8	You will now see your Article has been added to the Content section of your Layout. You can click and drag to reorder the content components.	
9	After you add or reorder content, be sure to scroll to the bottom of the page to save your changes.	

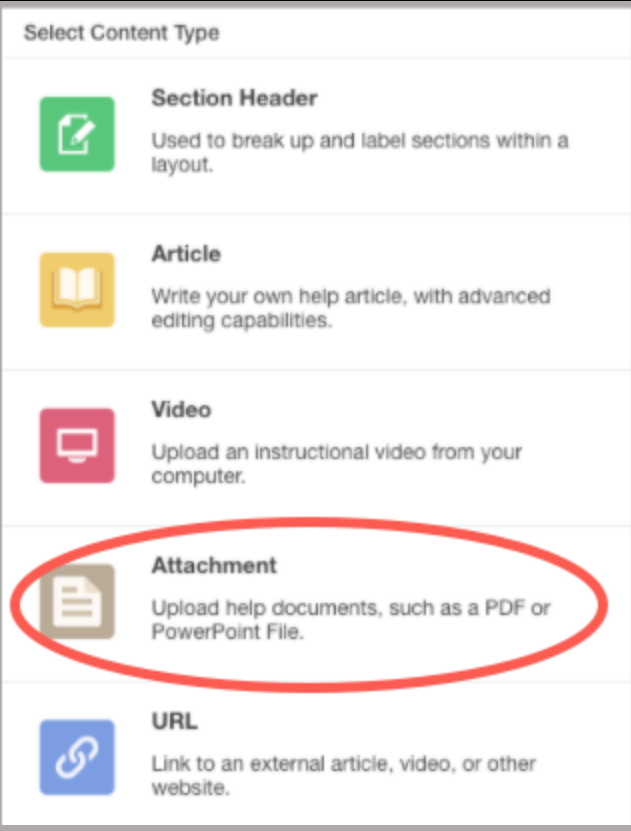
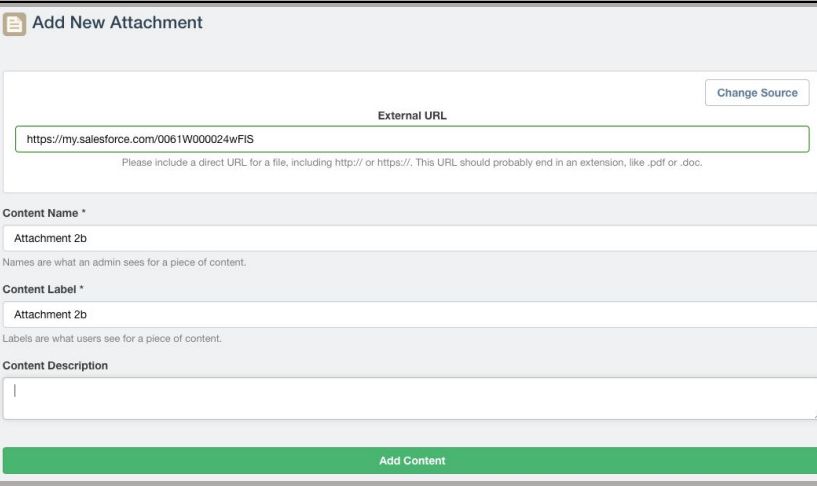
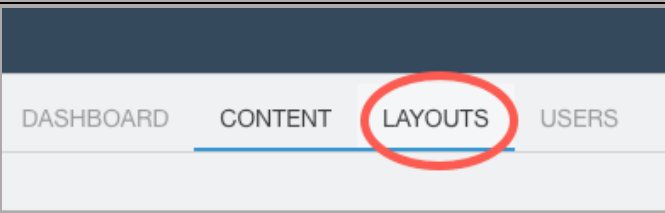
Step 3c: Add New Content: Video

1	Select the type of Content you want to add. For this example, we'll add a Video.	 The screenshot shows a 'Select Content Type' dialog box with five options: Section Header, Article, Video, Attachment, and URL. The 'Video' option, which includes a computer monitor icon and the text 'Upload an instructional video from your computer.', is circled in red.
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'.	 The screenshot shows a form with three input fields: 'Content Name *' (containing 'Making Cookies'), 'Content Label *' (containing 'Making Cookies'), and 'Content Description'. Below these is a question 'Where is your Video file located?' with two buttons: 'My Computer' (with a computer monitor icon) and 'External URL' (with a link icon).

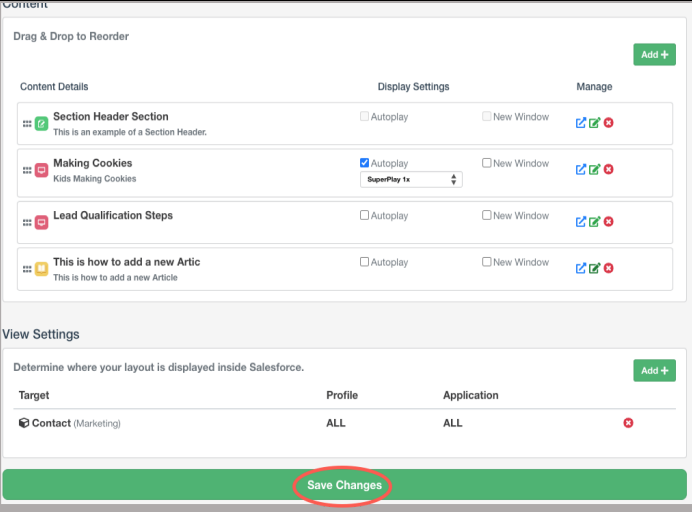
3	You will see the option to upload a file or type in the video's URL. For this example we will upload a file.	 The screenshot shows a dark blue background. At the top, there is a light blue box with a dashed border containing a file icon and the text 'Upload File' and 'Drag & Drop a file or click here to upload.' Below this is a white box with the label 'External URL' and a text input field. A small note at the bottom of the white box says 'Please include the full video URL, including http:// or https://. We currently support videos from YouTube and Vimeo.'
4	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'.	 The screenshot shows a white background. At the top, there is a dark blue box with a file icon and the text '20170730_170313.mp4'. Below this are two buttons: 'Remove File' (white with blue border) and 'Start Upload' (green with white text).
	When the upload has completed, click 'Add Content' at the bottom of the page.	 The screenshot shows a green button with the text 'Add Content' in white.

5	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'.																																	
6	You will now need to navigate back to the Layouts tab to add the new content to the layout.																																	
7	Click "Details" of the layout where you would like to add the new content.	 <table><thead><tr><th>Name</th><th>Description</th><th>Target</th><th>Manage</th></tr></thead><tbody><tr><td>Account</td><td></td><td>Case ⓘ</td><td>Details ▾</td></tr><tr><td>Home</td><td></td><td>Kyle Page ⓘ</td><td>Details ▾</td></tr><tr><td>Leads</td><td>Help Layout for Leads</td><td>Lead ⓘ</td><td>Details ▾</td></tr><tr><td>Marketing Contact Layout</td><td></td><td>Contact ⓘ</td><td>Details ▾</td></tr><tr><td>Retail Account Layout</td><td></td><td>Account ⓘ</td><td>Details ▾</td></tr><tr><td>Service App Layout</td><td></td><td>Account ⓘ</td><td>Details ▾</td></tr><tr><td>Wholesale Account Layout</td><td></td><td>None</td><td>Details ▾</td></tr></tbody></table> Displaying 1-7 of 7 Results	Name	Description	Target	Manage	Account		Case ⓘ	Details ▾	Home		Kyle Page ⓘ	Details ▾	Leads	Help Layout for Leads	Lead ⓘ	Details ▾	Marketing Contact Layout		Contact ⓘ	Details ▾	Retail Account Layout		Account ⓘ	Details ▾	Service App Layout		Account ⓘ	Details ▾	Wholesale Account Layout		None	Details ▾
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8	Click 'Add' to add content.																																	

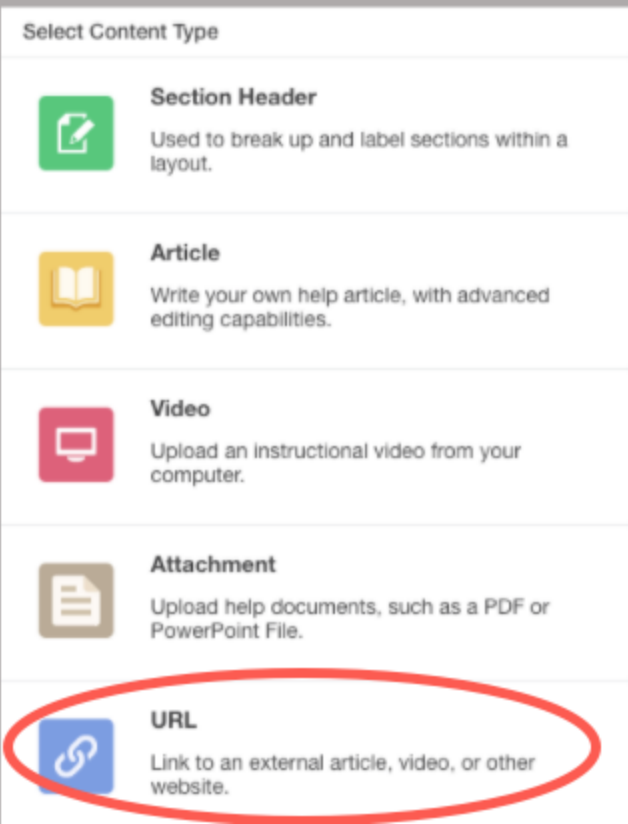
9	Choose and click the Content you want to add to your layout.	
10	You will now see your video has been added to the Content section of your Layout. You can click and drag to re-order the content components.	
11	After you add or reorder content, be sure to scroll to the bottom of the page to save your changes.	
Step 3d: Add New Content: Attachment		

1	Select the type of Content you want to add. For this step, we'll add an Attachment.	 Select Content Type Section Header Used to break up and label sections within a layout. Article Write your own help article, with advanced editing capabilities. Video Upload an instructional video from your computer. Attachment Upload help documents, such as a PDF or PowerPoint File. URL Link to an external article, video, or other website.
2	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'.	 Add New Attachment External URL: https://my.salesforce.com/0061W000024wFIS Please include a direct URL for a file, including http:// or https://. This URL should probably end in an extension, like .pdf or .doc. Content Name * Attachment 2b Names are what an admin sees for a piece of content. Content Label * Attachment 2b Labels are what users see for a piece of content. Content Description Add Content
3	You will now need to navigate back to the Layouts tab to add the new content to the layout.	 DASHBOARD CONTENT LAYOUTS USERS

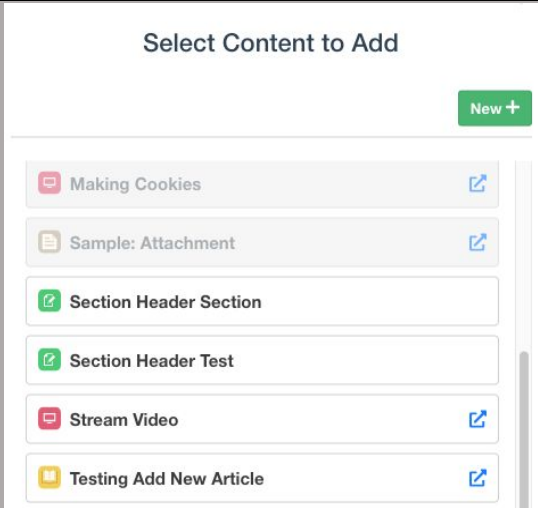
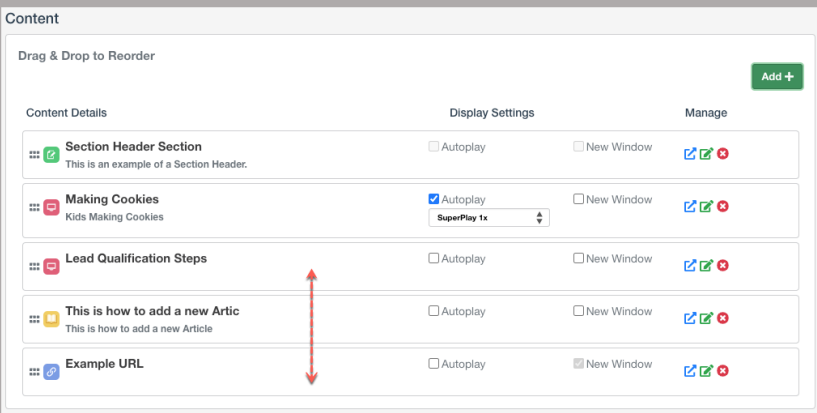
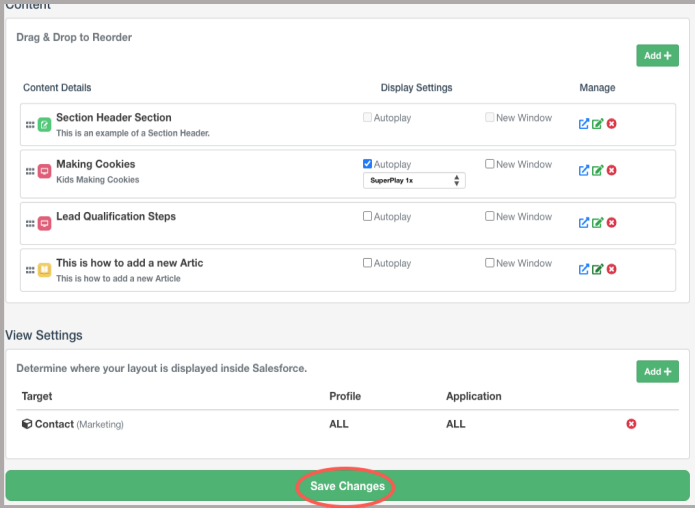
4	Click “Details” of the layout where you would like to add the new content.	<table><thead><tr><th>Name</th><th>Description</th><th>Target</th><th>Manage</th></tr></thead><tbody><tr><td>Account</td><td></td><td>Case ⓘ</td><td>Details ▾</td></tr><tr><td>Home</td><td></td><td>Kyle Page ⓘ</td><td>Details ▾</td></tr><tr><td>Leads</td><td>Help Layout for Leads</td><td>Lead ⓘ</td><td>Details ▾</td></tr><tr><td>Marketing Contact Layout</td><td></td><td>Contact ⓘ</td><td>Details ▾</td></tr><tr><td>Retail Account Layout</td><td></td><td>Account ⓘ</td><td>Details ▾</td></tr><tr><td>Service App Layout</td><td></td><td>Account ⓘ</td><td>Details ▾</td></tr><tr><td>Wholesale Account Layout</td><td></td><td>None</td><td>Details ▾</td></tr></tbody></table> Displaying 1-7 of 7 Results	Name	Description	Target	Manage	Account		Case ⓘ	Details ▾	Home		Kyle Page ⓘ	Details ▾	Leads	Help Layout for Leads	Lead ⓘ	Details ▾	Marketing Contact Layout		Contact ⓘ	Details ▾	Retail Account Layout		Account ⓘ	Details ▾	Service App Layout		Account ⓘ	Details ▾	Wholesale Account Layout		None	Details ▾
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5	Click ‘Add’ to add content.	Content Drag & Drop to Reorder Content Details Manage Add +																																
6	Choose and click the Content you want to add to your layout.	Select Content to Add New + Making Cookies ⓘ Sample: Attachment ⓘ Section Header Section Section Header Test Stream Video ⓘ Testing Add New Article ⓘ																																
7	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.	Content Drag & Drop to Reorder Add + Content Details Display Settings Manage Section Header Section This is an example of a Section Header. Making Cookies Kids Making Cookies Lead Qualification Steps This is how to add a new Article This is how to add a new Article ☐ Autoplay ☐ New Window ⓘ ⚙ ⌵ ☒ Autoplay ☐ New Window ⓘ ⚙ ⌵ SuperPlay 1x ☐ Autoplay ☐ New Window ⓘ ⚙ ⌵ ☐ Autoplay ☐ New Window ⓘ ⚙ ⌵																																

8	After you add or reorder content, be sure to scroll to the bottom of the page to save your changes.	
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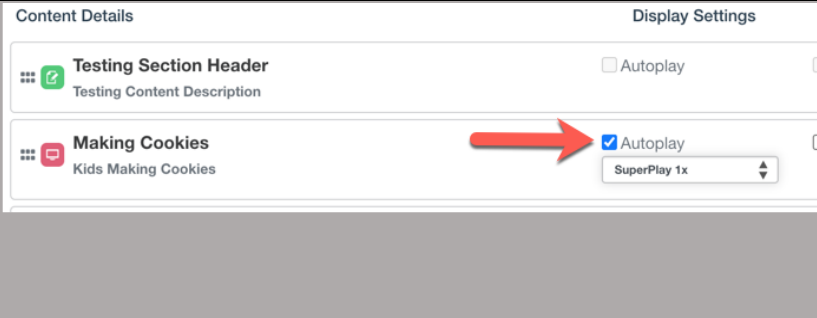
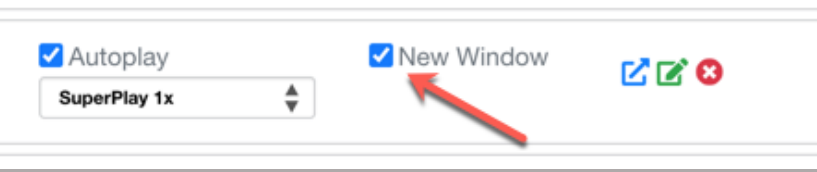
Step 3e: Add New Content: URL

1	Select the type of Content you want to add. For this step, we'll add a URL.	
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2	Paste the URL in the Content Link field. Fill in the Content Name, Content Label and Content Description fields. Click 'Add Content'.	 Add New URL Content Link* https://www.digadop.com/ Full URL required. Including http:// or https:// Content Name * Example URL Names are what an admin sees for a piece of content. Content Label * Example URL Labels are what users see for a piece of content. Content Description Add Content																																
3	You will now need to navigate back to the Layouts tab to add the new content to the layout.	DASHBOARDCONTENTLAYOUTSUSERS																																
4	Click "Details" of the layout where you would like to add the new content.	<table><thead><tr><th>Name</th><th>Description</th><th>Target</th><th>Manage</th></tr></thead><tbody><tr><td>Account</td><td></td><td>Case 1</td><td>Details</td></tr><tr><td>Home</td><td></td><td>Kyle Page 1</td><td>Details</td></tr><tr><td>Leads</td><td>Help Layout for Leads</td><td>Lead 1</td><td>Details</td></tr><tr><td>Marketing Contact Layout</td><td></td><td>Contact 1</td><td>Details</td></tr><tr><td>Retail Account Layout</td><td></td><td>Account 1</td><td>Details</td></tr><tr><td>Service App Layout</td><td></td><td>Account 1</td><td>Details</td></tr><tr><td>Wholesale Account Layout</td><td></td><td>None</td><td>Details</td></tr></tbody></table> Displaying 1-7 of 7 Results	Name	Description	Target	Manage	Account		Case 1	Details	Home		Kyle Page 1	Details	Leads	Help Layout for Leads	Lead 1	Details	Marketing Contact Layout		Contact 1	Details	Retail Account Layout		Account 1	Details	Service App Layout		Account 1	Details	Wholesale Account Layout		None	Details
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5	Click 'Add' to add content.	Content Drag & Drop to Reorder Content Details Manage Add +																																

6	Choose and click the Content you want to add to your layout.	
7	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.	
8	After you add or reorder content, be sure to scroll to the bottom of the page to save your changes.	

Step 3f: Set Autoplay and other Settings

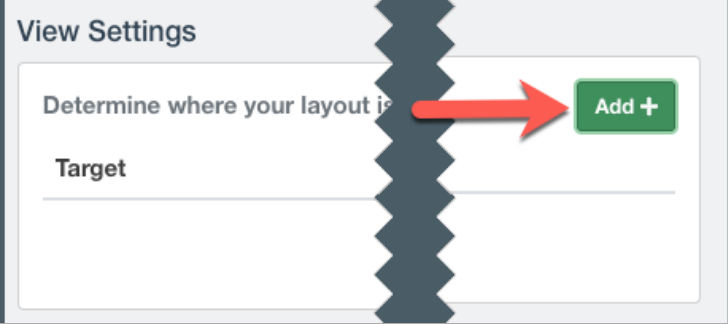
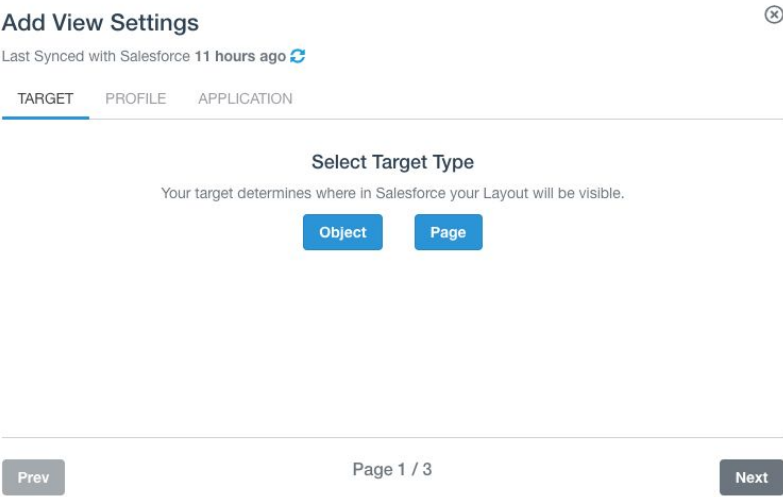
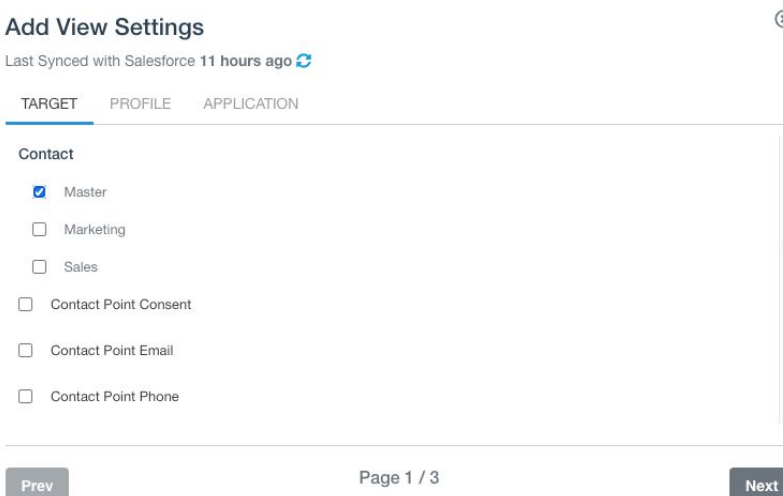
1	When Autoplay is selected for a piece of content, the content will open (and start playing automatically if it's a video) when the 'DigadopHelp' button is clicked.	
2	When a Superplay option is selected for a piece of content, the Help Content Layout will automatically open upon navigation to the record 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.	
3	Checking 'New Window' will cause the content to open in a new window.	

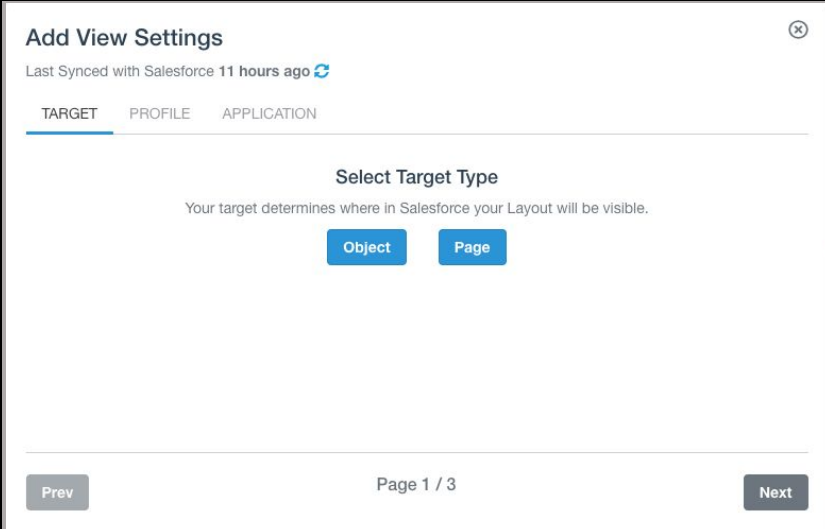
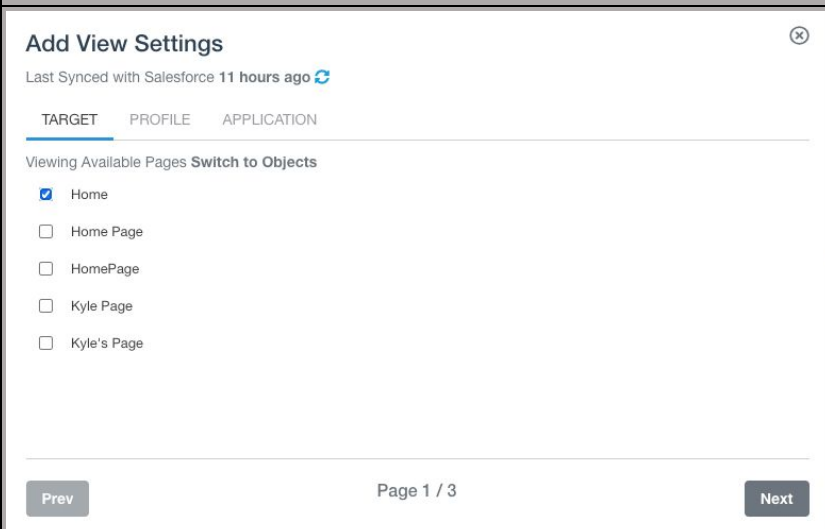
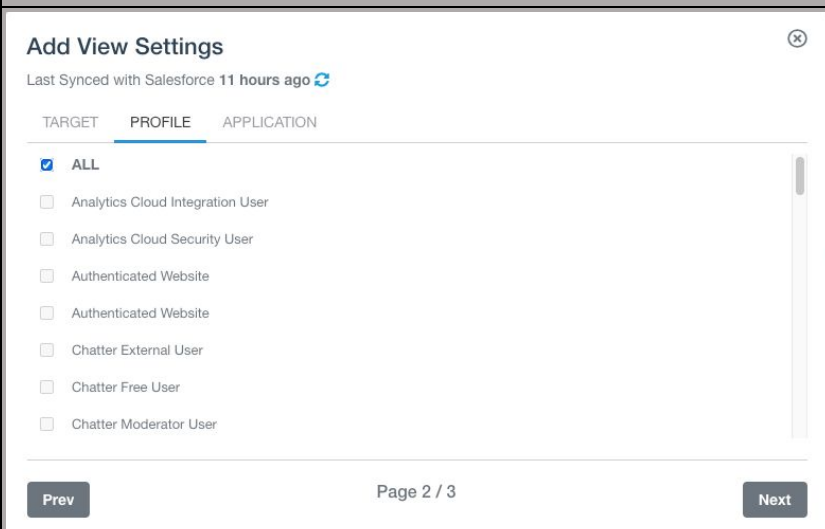
Step 4: Add View Settings

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

Prerequisites:

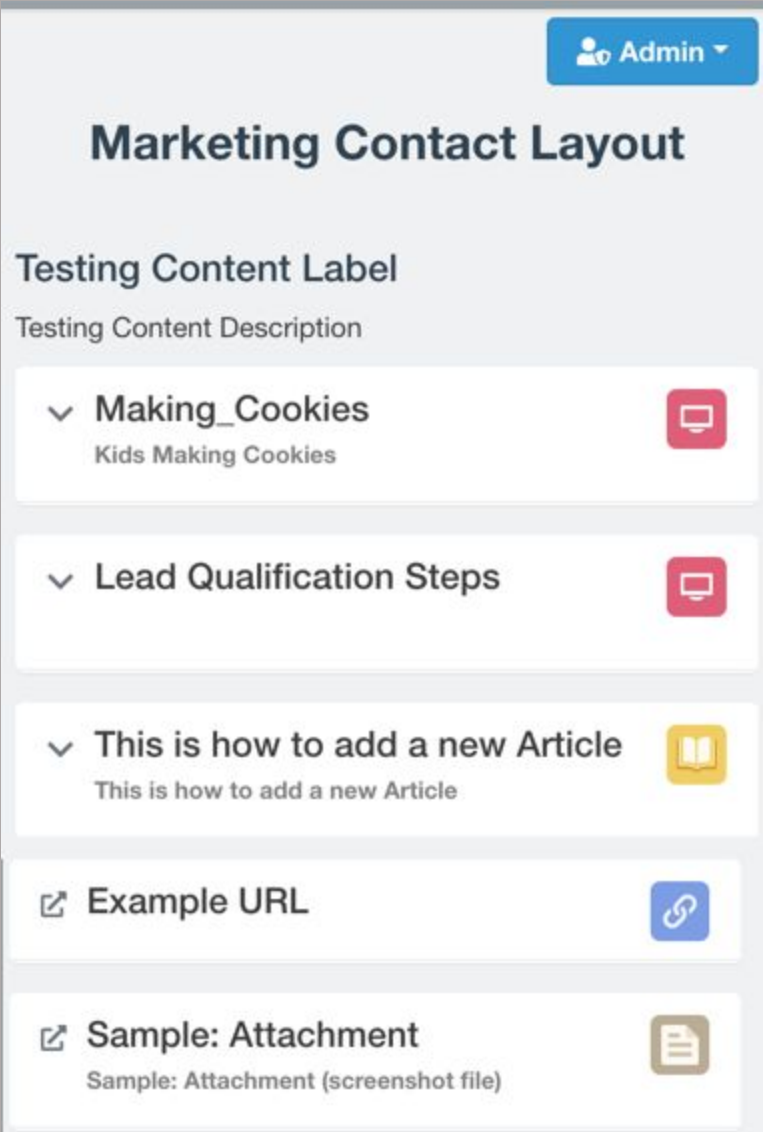
- *Must be a Digadop Admin*

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.	

4	If you wanted to display your Help Content Layout on a non-object page such as the Home page, you would select 'Page'.	
5	From here you would select the page where you wish to display.	
6	Next, click on the 'Profile' tab. From here you are able to specify which Profiles are able to see the layout.	



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'.	Add View Settings Last Synced with Salesforce 11 hours ago TARGETPROFILEAPPLICATION ☒ ALL ☐ All Tabs ☐ App Launcher ☐ Bolt Solutions ☐ Community ☐ Consumer Goods ☐ Content ☐ Force.com PrevPage 3 / 3Selected 1 combinations to add.Save
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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"	 The screenshot shows a user interface for a 'Marketing Contact Layout'. At the top right is a blue button labeled 'Admin' with a user icon. The main heading is 'Marketing Contact Layout'. Below it is a section titled 'Testing Content Label' with a subtitle 'Testing Content Description'. This section contains five items, each with a dropdown arrow, a title, a subtitle, and an icon: Making_Cookies (icon: red monitor) with subtitle 'Kids Making Cookies' Lead Qualification Steps (icon: red monitor) This is how to add a new Article (icon: yellow book) with subtitle 'This is how to add a new Article' Example URL (icon: blue link) Sample: Attachment (icon: brown document) with subtitle 'Sample: Attachment (screenshot file)'
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