Pre-Workshop Checklist

Congrats! You are on your way to hosting a Salesforce Lightning Adoption Workshop. We've created the checklist below to help you stay on track as you plan and prepare for your workshop. We know you’re already itching to dig in, so first things first – go to the link below to sign up and access a scratch org for this workshop.

CREATE YOUR ORG > https://platform-workshops.herokuapp.com/adoption

*Scratch orgs expire after 24 hours. Feel free to create as many scratch orgs as you need to practice, with a new one created the day of your workshop.

☐ 4+ weeks out

• Choose a date and venue for your workshop.
• Create and send invitations – include your workshop topic, date, time, and location.
• Promote your workshop on social media.

*Pro tip: Use the provided promo card image to create your invite and promote on social media.

☐ 3 weeks out

• Practice your workshop: You can sign up to access the scratch org for your workshop here.
  > https://platform-workshops.herokuapp.com/adoption

☐ 2 weeks out

• Fill out your swag request form to get fun gear to share with your attendees.*
  > https://bit.ly/2LJ6x27  [*5+ attendees required]

☐ 1 week out

• Send a reminder email to your attendees.

☐ Day of

• Send an email to your attendees with the link to the Lightning Adoption Workshop Launchpad, where attendees will go to sign up and access their scratch org.
  > https://platform-workshops.herokuapp.com/adoption

Pro tip: Ask your attendees to sign up and load their scratch org on their computer no more than 24 hours before the workshop. This will save time at the beginning of the workshop.

• If you’re running this workshop for a large group and want to avoid having to wait for orgs to load when your workshop begins, use the poolbot to spin up many orgs at least a few hours in advance of your workshop.

• Have fun and share photos from your workshop!
  Include: #LightningNow #WorkshopInABox.

Have questions or feedback about this workshop, running your own, or the Workshop-In-A-Box program in general? Please reach out here: https://bit.ly/2MyImAF.
Workshop Guide

Enable Your Customizations for Salesforce Mobile
Enable Your Customizations or Salesforce Mobile

Abstract

In this workshop, you will learn how to take existing Lightning customizations to your users’ phones, walk away with an understanding of the resources available to you, and discover the awesome features that will make your users more efficient on the go!

This workshop can take 20-45 minutes based on the objectives that you cover. Please just keep in mind that a few steps in the last objective require a mobile device and Salesforce Mobile to review!

Objective

- Customize a page with components designed for specific form factors. - 5-7 minutes
- Configure apps in the app launcher for mobile use. - 5-7 minutes
- Understand the different resources available. - 7-10 minutes
- Navigate Salesforce Mobile. (optional) - 10-15 minutes

Launch URL

Learning Objectives

The Salesforce mobile app has evolved and end users might notice is that the Lightning Experience is now mirrored on mobile! This seamless user experience means users don’t need extra training, and the personalizations they make to their navigation in Lightning Experience will extend to the mobile app.

It also brings the Admin experience in line with how you’re used to customizing Lightning Experience, with tools like the Lightning App Builder and App Manager.

NOTE: In this workshop, reviewing your modifications on the mobile app is optional. To do so, you will need your mobile device and the Salesforce Mobile app. If you have both, you can log into the Salesforce Mobile app with your workshop credentials. (This org is available for 24 hours.)

Step 1: Customize a Record Page

Salesforce has brought the customizable Lightning page architecture to mobile, so your users can interact with the same record pages in the mobile app as they do in Lightning Experience on desktop.

Open the Lightning App Builder

1. From Setup, open the App Launcher.
2. Start to type Accounts in the Search Bar.
3. Switch the List View to **All Accounts**.

4. Select any account from the list view by clicking its name.

5. Click the gear icon in the upper-right corner and select **Edit Page** to open the page in the Lightning App Builder.
Add a Desktop-Only Component to the Page

Hovering over a component in the component palette displays an icon showing which form factor(s) the component supports. For example, Accordion supports both phone and desktop, but Topics does not.

NOTE: You can make all the form factor icons display by default by selecting Always show icons from the palette settings menu.
1. Drag the **Topics** component anywhere on the page.

2. Select the **Phone** option for the preview.

3. a. Scroll down if necessary to see the component marked **Unsupported form factor**.

   Your users won’t see that on their phones. It’s just there to remind you that there’s a component there.

**Configure a Component to Only Show Up on Desktop**

Sometimes a component may work on the phone, but you just don’t want it there. Imagine a list view showing My Top 5 Opportunities Closing This Month added to every account and opportunity to keep those deals top of mind for salespeople—super convenient for desktop, but on a phone, it just takes up too much room.

Set a component visibility filter by device.

1. While still in phone preview, drag a **List View** component onto the page.
   
   a. Object: Opportunity
   
   b. Filter: Closing This Month
2. Under Set Component Visibility, click **Add Filter**.

3. Change the Filter Type to **Device**.

4. Leave the operator as **Equal** and the value as **Desktop**.

5. Click **Done**.

Now users only see the component on an account when using a computer, not a phone. You can see this when you change the Lightning Page View by device.
Activate Your Page

After you save a page for the first time, you’re prompted to activate it and assign it to be the default page for the org, the default page for an app, or, if it's a record page, to a combination of apps, record types, and profiles. Set this page as the default for the org.

1. Click **Save**, then click **Activate**.

2. Click **Assign as Org Default**.

3. Select **Desktop and Phone** and click **Next**.

4. Click **Save**.

5. Click **Back** to exit the Lightning App Builder.

Now you see your List View and Topics components wherever you put them.

NOTE: That assignment confirmation screen also allows you to create a completely different page for desktop and phone, rather than setting visibility on a lot of components.

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Step 2: Customize Navigation

Create a Mobile-Only App and Customize Its Navigation

Next, you use App Manager to create a phone-only app with two items, and assign it to a profile.

1. On the desktop, click and select **Setup**. This launches Setup in a new tab.

2. Type **App Manager** in the Quick Find box and select **App Manager** from the results.

3. Click **New Lightning App**.

4. Name your app **My Mobile App**.

5. Click **Next**.

6. Change the Supported Form Factors to **Phone**.
Click **Next**, then **Next** again.
Move **Time Sheets** and **Tasks** to **Selected Items**.

1. Click **Next**.
2. Move **System Administrator** to **Selected Profiles**.
3. Click **Save & Finish**.

From the desktop, open App Launcher and search for “Mobile.” Verify that your app does not appear.
Additional Resources

Back in the **New Salesforce Mobile App Quick Start** in Setup, scroll to the bottom to review the other useful tools that help with the transition like mass-updating your Lightning apps and existing record pages so you don’t have to manually add the form factors to each one.

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**Enable Your Customizations for Mobile**

**Run the Salesforce Optimizer for Mobile Lightning Pages Report (Beta)**

See how your custom Lightning pages will be affected by the transition, and get recommendations to fine-tune the mobile experience. [Tell Me More](#)

**Launch the Tool**

**Update Your Lightning Apps for Mobile**

After reviewing the Optimizer for Mobile Lightning Pages Report, you're ready to add the phone form factor to your apps using our transition tool.

This tool updates all your Lightning apps at once. Or you can update apps individually in the App Manager. [Go to the App Manager](#)

**Launch the Tool**

**Update Your Pages for Mobile**

After you update your apps, use this tool to add the phone form factor to your desktop-assigned pages.

This tool updates all your desktop-assigned pages at once. Or you can update pages individually in the Lightning App Builder. [Go to the Lightning App Builder](#)

**Launch the Tool**

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The new Salesforce Optimizer for Mobile Lightning Pages Report evaluates the following features:

- Record details on Lightning pages
- Related lists on Lightning pages
- Visualforce components on Lightning pages
- Lightning components on Lightning record pages
- Chatter components on Lightning pages

For more info please refer [Optimizer Mobile help](#)

Now, if you have a mobile device with Salesforce Mobile, you are ready to learn how to navigate the app!
Part 3: Navigate Salesforce Mobile (optional)

NOTE: This section can only be completed if you have logged into the Salesforce Mobile App with your workshop credentials. (This org is available for 24 hours.)

Let's review the changes we've made to our org to make it easier for our users to access what they need from Salesforce Mobile.

1. View an Account record.
2. Notice that you do not see the Topics component or the List View component that we added to our page in the Lightning App Builder.
3. Now, open the menu and tap App Launcher.
5. Notice both Time Sheets and Tasks are available.
Additional Features

There are a few other changes for the end user in the Salesforce mobile app that are designed to help them quickly access any app, object, or other item that they need. While in the app, try them for yourself!

1. **New mobile navigation bar**: The new navigation bar added to the bottom of the Salesforce mobile app’s UI makes it easy for users to access their favorites, search, and get notifications for each app.

2. **App launcher on mobile**: Lightning Experience on mobile means the user can access their Salesforce app launcher and toggle between Sales, Service, Marketing, or custom apps from their mobile device. They can also get to their profile where they can toggle between their own accounts.

3. **Personalization of navigation**: Lightning Experience lets users customize their navigation bar on their desktop so that every user can create a more relevant experience. Items on the mobile navigation menu sync with the ordering from Lightning Experience on desktop.

4. **Voice shortcuts**: iOS users can quickly access their accounts, contacts, and any custom data records with voice commands using a Siri shortcut. With the voice shortcuts, a user can say, “Hey Siri, show me my dashboard,” and the Salesforce app will open to the dashboard page.