Pre-Workshop Checklist

Congrats! You are on your way to hosting a Salesforce Customer 360 Platform 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.
Abstract

Learn how to make simple updates to your Salesforce org to make Lightning Experience more than an new UI for your users.

Launch URL

https://platform-workshops.herokuapp.com/adoption

Introduction

Everyone is moving to Lightning Experience with the Critical Update coming in January. You have a team of recruiters that you want to show how Lightning Experience will make their recruiting process better and provide more information to them than ever before.

Part 1: Upgrade & Customize our Recruiting App

Let’s start customizing our org and the Recruiting App to take advantage of the new customizations that are available to us in Lightning Experience.

First, we will update the theme of our org to something a little cooler using one of the standard themes provided in the org. There are many to choose from:

1. Navigate to the Setup Gear Icon, and select Setup.
2. In the Quick Find searchbox, type “Theme”.
3. Select Themes and Branding.
4. Click on the action arrow in the list of themes next to Codey Canyon and select View.
5. Select Preview to preview what this theme looks like in the org:
   a. Notice the different background and color.
6. At the top of the page, select End Preview and then Activate to activate this new theme.
If you want to get really fancy, you can create your own Custom Theme and even override the Release image on the Lightning Experience loading page with your own! For now, let’s go with Codey and work on customizing our Recruiting App. In order to customize our Recruiting App we need to upgrade it from a Classic App to a Lightning App:

1. In the **Quick Find** searchbox, type **App Manager**.
2. In the **App List**, find the **Recruiting App**.
3. Click on the action arrow and select **Upgrade**.
   a. Delete the App Name and API name provided and enter:
   b. **App Name**: Easy Recruiting
   c. **API Name**: tab to enter or Easy_Recruiting
   d. Select **Upgrade**.

Now, let’s configure our new Easy Recruiting Lightning App:

1. In the **App List**, find the **Easy Recruiting App**.
2. Click on the action arrow and select **Edit**.
   a. In **App Details & Branding**:
      i. **Upload** Logo: [https://drive.google.com/open?id=1zw_if_s6uUqCk-WmdUj_Gmn-1vV0WNRB](https://drive.google.com/open?id=1zw_if_s6uUqCk-WmdUj_Gmn-1vV0WNRB)
      ii. **Primary Color Hex Value**: #120701
      iii. Select checkbox for **Use the app's image and color instead of the org's custom theme**
      iv. Select **Save**.
   b. In **Utility Items**, let’s add an announcement for our recruiters:
      i. Select **Add Utility Items**.
      ii. In the searchbox, type “**Rich Text**” and select it.
         1. **Label**: ANNOUNCEMENTS
         2. **Icon**: announcement
         3. **Component Properties**: Marc Benioff from Salesforce will be coming on 11/24/2019 a Salesforce Recruiting workshop. See your manager to sign up!
      iii. Select **Save**.
3. Select the **Back** link to go back to Setup.
Using the **App Launcher**, choose the **Easy Recruiting App** and let’s check out our new theme, utility bar Announcement and app customizations!

*Note: If you do not see the updates, logout and log back in and select the Easy Recruiting App.*

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**Part 2: Let’s make some updates to guide our users through the recruiting process**

Now that we have our Recruiting App customized, it’s time to make some updates to help our recruiters with their jobs. We are even going to make some updates based on the Salesforce #LightningStrikes contest!

The first thing we want to do is enable provide our recruiters with some guidance and a little surprise when they get a position filled. Let’s enable Path:

1. Navigate to the **Setup Gear Icon**, and select **Setup**.

2. In the **Quick Find** searchbox, type “**Path**”

3. Select **Path Settings**.

4. Select **Enable**.

5. Select **New Path**:
   a. **Path Name**: Standard Position Path
   b. **API Reference Name**: tab to complete or enter “**Standard_Position_Path**”.
   c. **Object**: Position
   d. **Record Type**: Standard Position
   e. **Picklist**: Status

6. Select Next.

Now, we will enter the guidance for a few steps along the Path for Recruiters to understand the process.

1. In the New Position status, enter:
   a. Add the following **Key Fields**:
      i. Min Pay
      ii. Max Pay
iii. Job Description

i. Select **Save**.

b. Add the following in **Guidance for Success**: “Be sure to update the fields to move your Position to Pending Approval.”

2. In the **Pending Approval** status, enter:

a. Add the following **Key Fields**:

   i. Hiring Manager
   
   ii. Min Pay
   
   iii. Max Pay
   
   iv. Job Description
   
   v. Select **Save**.

b. Add the following in **Guidance for Success**: “Please confirm the Hiring Manager before approval.”

3. Select **Next**.

4. Select the Toggle beside “**B. Activate your path...**” to activate the path.

5. Next, select the toggle beside “**A. When users reach a specific step in the path, help them celebrate...**” to activate Path celebration with the following setting:

   a. **Picklist Value**: Closed - Filled
   
   b. **Celebration Frequency**: Always

6. Select **Finish**.

Before we can see the Path we just created, we need to add it to the Positions Lightning Record Page. Let’s do this and make a few other updates to the page:

1. Go back to the tab with the **Easy Recruiting App** open or simply select the **Easy Recruiting App** in the **App Launcher**.

2. In Global Search, type “**Business Analyst**” and select one of the Positions that is shown.

3. Then, select the **Setup Gear Icon**, and select **Edit Page**.

4. In the **Lightning Components** section, drag the following components onto the page:

   a. **Path**
   
   b. **Related List Quick Links**
5. Next, let’s put an alert on the screen to alert our recruiters that a position is only for an Internal Hire. We will do this using a Rich Text Component. This is also an idea that came from #Lightningstrikes.

   a. Drag the **Rich Text** Component onto the page above the Highlight Panel.

   b. In the configuration panel, enter ***INTERNAL CANDIDATES ONLY***. Make sure you BOLD and CENTER your text and even add a color that will alert the recruiter.

   c. In the Set Component Visibility section, let’s only make this component visible when the position requires an internal candidate:

      i. Select **Add Filter**

         1. **Field**: Internal Only

         2. **Operator**: Equal

         3. **Value**: True

      ii. Select **Done**.

6. Next’s let use Component Visibility to control the “layout” of the page when the Position is the New Position status using the Related Record component with only a few fields showing:

   a. Select the **Related Record** component and drag it onto the page above the component with the Related and Details Tabs:

      i. In the configuration panel select:

         1. **Lookup Field**: Use This Position__c

         2. **Update Action**: Update Position

      ii. In the Set Component Visibility section:

         1. Select **Add Filter**

            a. **Field**: Status

            b. **Operator**: Equal

            c. **Value**: New Position

         2. Select **Done**.

   b. For all of the other status’ we want to show the Related and Details tab so we need to add component visibility here:

      i. Click into the Tab component for Related and Details tabs.

      ii. In the Set Component Visibility section:
Part 3: Reports in Lightning Experience

Reports have gotten an overhaul in Lightning Experience. There have been several new features as well as a new Report builder delivered. We need to create a candidate report that we can add to our Positions record page to show recruiters how many candidates are available in the location of their position (#Lightningstrikes). While we are in the report, lets count the number of unique candidates there are based on the candidates email address because as you know some candidates can have the same name. First, we need to setup the Unique Row count feature up (back to Setup we go!):

1. Navigate to the Setup Gear Icon, and select Setup.
2. In the Quick Find searchbox, type “Reports”
3. Select Reports and Dashboards Settings.
4. Select Enable Unique Row Count Aggregate in Reports
5. Click Save.

Now let’s create the report we need:

1. Navigating back to the browser tab with the App open, select the Reports tab.
3. In the searchbox, type “Candidate” and select it from the options.
4. Select Continue.
5. In the report builder, search and select the following fields for our report:
   a. First Name
   b. Last Name
   c. Email
   d. City
   e. State/Province

6. In order to add a report chart, we need to group our report. Let’s group by City.

7. Next, to get an idea of how many unique candidates we have let’s set the Unique Row count feature on the Email field. This will show us by email address how many are unique even though there are candidates that appear duplicated with the same name.
   a. Navigate to the email field
   b. Click the action arrow and select **Show unique count**.

8. Now let’s add the Report Chart and Save:
   a. Select **Add Chart**.
   b. Select the gear icon, and edit the chart properties:
      i. Chart Title: Candidates by City
      ii. Value: Record Count
   c. Select **Save and Run**
   d. **Report Name**: New Candidates Report
   e. For the folder field, click on **Select Folder** and choose **Public Reports**
   f. Click on **Select Folder**
   g. Select **Save**.

When you look at the report you will see that it appears that we have no duplicated candidates based on the Unique Count of email addresses. If you want to test out the Unique count feature more, clone a Candidate and watch the Unique Count stay the same but the record count go up.

The last thing we need to do here is put this report chart on our Positions Lightning record page so that when a recruiter looks at a position, they can see what candidates are located in the city of their position:

1. Navigate to the **Positions** Tab and select the action arrow to select your recent record: **Business Analyst**
2. Then, select the **Setup Gear Icon**, and select **Edit Page**.

3. In the **Lightning Components** section, drag the **Report Chart** component onto the page above the Activity component. Since we only have one report available it is already configured but in your org you may need to configure the component for the right chart to appear.

4. Select **Save**.

5. Select **back**.

Now let’s go back and review all that we have done:

- First, let’s test our internal candidate alert. Edit the record and check the Internal Only? checkbox and Save. Do you see the alert?

- Take a look at the Path and select New Position and Pending Approval status’ to see the guidance given.

- Hover over the Related List Quick Links.

- Take a look at the page layout in the New Position status. Do you see just the fields from the update action?

- Move the Position to Pending Approval. Do you see the full details and related list tabs appear?

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**Part 4: Stay in Lightning Experience (optional)**

Let’s activate the feedback form so the we capture why recruiters are switching to Salesforce Classic:

1. Navigate to the **Setup Gear Icon**, and select **Setup**.

2. In the **Quick Find** searchbox, type “**Adoption**”.

3. Select **Adoption Assistance**.

4. Toggle the **Switch to Salesforce Classic User Feedback Form** to **On**.

5. Check the checkbox **Show every time the user switches to Salesforce Classic**.

6. Set the Chatter Group to **Lightning Experience Feedback**.

7. Select **Activate**.

8. Navigate to your profile and select **Switch to Salesforce Classic**

Did you see the form come up? Now you will be able to get real time feedback from your users on why they are switching.
Conclusion

Lightning Experience is Here and Now You know What to do to make it an even better experience!