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://lightning-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://lightning-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://lightning-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

Move JavaScript Buttons and Actions with the Lightning Configuration Converter
Abstract

JavaScript Buttons is one area that needs to be addressed prior to moving to Lightning Experience. Come discover the Lightning Configuration Converter to understand the manual and automated ways in which you should replace your JavaScript Buttons.

Objective

• Review Configuration Converter
• Convert/deploy button
• Check for missing buttons/actions

Launch URL

https://lightning-platform-workshops.herokuapp.com/adoptions

Introduction

Have you started to look at your org in Lightning Experience and found some actions and buttons are missing? Well, we have a tool that will help you transition your org’s JavaScript buttons to Lightning components, quick actions, or other declarative solutions. It’s important to note that this tool won’t convert every JavaScript button, but it will help you understand what alternatives are available for those more complex use cases.
Part 1: Familiarize Yourself with the Lightning Experience Configuration Converter

First, let’s take a look at the tool in greater detail. If you are not familiar with it, we will be working with the Lightning Experience Configuration Converter, found at https://lightning-configuration.salesforce.com/. When connected to your Sandbox, you can review your Javascript buttons that need to be replaced, as well as those Actions and Buttons that may be supported in Lightning Experience but missing from your pages.


2. Click Login with Sandbox.

3. Find your org Username and Password on the Org Launch screen (as pictured below); enter them into the Login screen.

4. Click Allow, if prompted to Allow Access.

Once you are logged in, you land on the Javascript Button tab. One this tab, you can find the buttons that can be converted into a Lightning alternative with the tool, as well as more information into how to convert the buttons that cannot be converted with the tool. On the Actions and Buttons tab you can find those actions and buttons that are missing from the page layouts. The other tabs in tool help you review your Visualforce pages, hard-coded URLs, and Appexchange packages.
Let's stay on the JavaScript Buttons tab for a minute and look at all of the information that is provided. First, we find that there are three actions that we can take for those actions that represent the more simple use cases like URL Hacks. Those actions are:

1. **Preview** where we can see the component code or declarative steps we take to convert your buttons.
2. **Convert** which will create a button’s replacement, add it to your org, but not to your page layout.
3. **Convert and Deploy** which will create the button’s replacement, add it to your org and to all of your page layouts containing the original button. It will not touch your original button, so no need to worry!

As we then look closer at the JavaScript buttons themselves, we see a few things:

First we see a tab for Detected Buttons and a tab for Converted Buttons.

![Detected Buttons and Converted Buttons](image)

In order to detect the buttons in our org, click **Scan for Javascript Buttons**. It may take a few seconds for your metadata to refresh.

![Scan for Javascript Buttons](image)

For those detected buttons, we can see some information as to which object they are from, what Page Layout they can be found on in Classic, which users are impacted by the buttons, our recommendation for conversion and whether or not it has been converted. Take a look at the recommendations provided for converting your buttons in a little more detail now.

![Detected Buttons and Converted Buttons Table](image)
**Part 2: Convert the Google Button**

We will use this conversion tool to convert and deploy the Google button in our org. On the Google button, click on **Preview**. This will show you what will be created as a Lightning alternative for the Google button:

![Conversion Steps](image)

Now, click on **Deploy & Convert**. In doing so, the alternative that we just previewed will be created and added to the appropriate page layout. (Optional: Open an Account and view the Google button in the Highlights Panel.)

If you were to look at the Account page, you will see that there is now a Google button available in the Highlights panel. (Optional: Open an Account and view the Google button in the Highlights Panel.)

**Part 3: Check for Other Actions and Buttons**

Turning our attention back to the tool, let’s now look at the “Actions and Buttons” tab. Imagine if you had 15 buttons you were using in Salesforce Classic, across multiple page layouts. Unless you move them to Lightning Experience, you won’t see them. It can be tedious to copy these buttons yourself especially when you deal with a bunch of layouts. We can fix that within a few clicks. With the Lightning Experience Configuration Converter, though, you can easily move actions from the Quick Actions in the Salesforce Classic Publisher section of a page layout to the Salesforce Mobile and Lightning Experience Actions section.

As with our JavaScript buttons, we need to scan our org for its actions and other buttons. Click **Scan for Actions and Buttons**. It may take a few seconds for your metadata to refresh.
Focusing first on the Account object, let’s go through the wizard to move our actions and buttons to the Salesforce Mobile and Lightning Experience Actions section of the page layout:

1. With the Account object selected, click **Move**.
2. Select the **Account_New** page layout; click **Next**.
3. Make sure the “**Move All Actions and Buttons**” box is checked; click **Next**.
4. Walk through the wizard. On screens 3 and 4, no action is required, so you can just click **Next** on both.
5. On the final screen, click **Move**.
Now all of your actions and buttons used in Salesforce Classic are available to your users in Lightning Experience! Go to an Account to check them out for yourself!

So, what do you say? Are you ready to embrace the efficiency of the Lightning Configuration Converter? Lastly, if you have time, check out the Hard-Coded URL tab and follow the prompts to update that hard-coded URL in your org as well in a few steps. No explaining needed!