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/adoptions

*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/adoptions

☐ 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/adoptions

  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.
  - 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

Elevate the Opportunity Workspace with Lightning Experience Features
Abstract

Learn how to take advantage of the layouts and app builder to get the most out of Sales Cloud Lightning. Get on the fast track to configuring the Opportunity Workspace in creative new ways with standard components like Path and take advantage of key capabilities to make your workspace dynamic.

Launch URL

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

Introduction

The Salesforce team has been running a pilot of Lightning Experience with the sales team and has received feedback to optimize the Opportunity workspace as follows:

- “We really liked the links at the top of our old page to get to the related lists.”
- “How can we show the products list when we get to Proposal/Price Quote stage and show the Contacts from the Account when we are in the Prospecting Stage?”
- “How can we quickly move our Opportunity to the next stage and enter all of the important details?”
- “It would be nice to see all the other closed opportunities on this account.”
- “Can I get the detail we care about on the Account without leaving the Opportunity Page?”

Using standard features and components in the Lightning App Builder, we will implement all of the feedback above using Clicks not Code!

Part 1: The Path Component

Let’s create a Path for Opportunities to make it easier for our sales reps to move their Opportunities along the Sales process.
Set up the Path in the Setup menu:

1. From Setup, enter **Path** in the Quick Find box, then select **Path Settings**.

2. Then click **New Path** to create a path.

3. Enter basic information about the path, and click **Next**.
   
   a. Enter a unique name for the path: **Opportunity Path**.

   b. Select the object that the path is based on: **Opportunity**.

   c. Select a record type. If all available record types for the object are already used by a path, select a different object. Or, exit path setup and create the record type.

   d. Select the picklist that the path is based on: **Stage**.

   e. Select **Next**.

![Path Setup](image)

Select key fields and enter guidance:

1. Prospecting

   a. Guidance for Success:

      i. Ask the following questions:

         1. Is the prospect’s business an organizational fit?

         2. Have you identified key stakeholders?

   b. Fields:

      i. Description.

      ii. Expected Revenue.

      iii. Next Step.
2. Qualification

   a. Guidance for Success:

      i. Ask the following questions:

         1. What is the business problem we are seeing to solve?
         2. How does the budget signoff process work?

      ii. Fields:

         1. Close Date.
         2. Next Step.
         3. Amount.

   b. Closed Won:

      i. Guidance for Success: Congratulations on Closing this Deal!
      ii. Fields: None.

3. Click **Next**.

4. Click **Active**.

5. Click **Finish**.

We are ready to use this on our Opportunity page. But first, let’s go to Part 2.

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**Part 2: Adding Related Record Information to the Lightning Page Using an Update Action**

We can use an Update Action to also present information from a Related Record on a Lightning Page by using the Related Record Component. To do this, we must first create an update action with the fields that we want to be available on our Opportunity Lightning Record Page.

1. In Setup, Select the **Object Manager** tab.

2. Select **Account**.

3. In the left menu, select **Buttons, Links, and Actions**.

4. Select **New Action**.
5. Enter in the Action Information:
   
   a. Action Type: **Update a Record**.
   
   b. Standard Label: **Update [Record]**.
   
   c. Name: **Account_Update**.

6. **Save**.

Next we will add and remove the fields we want to see on our Opportunity Lightning Record Page when viewing an opportunity.

Remove the following fields by scrolling over the field and selecting the Remove icon:

   a. **Phone**.
   
   b. **Industry**.
   
   c. **Type**.
   
   d. **Website**.

Add the following fields by dragging the fields from the palatte on the upper portion of the screen:

   a. **Account Number**.
   
   b. **SLA**.
   
   c. **Rating**.
   
   d. **Annual Revenue**.

When all fields are added, select **Save**.
This Update Action (Account_Update), can be added on the Account Record Page directly as a way to update the fields selected or can be used in a Related Record Lightning Component to display the fields on a Related Record. We will do this later.

We have finished all of the setup necessary to complete the new, optimized Opportunity Lightning Record Page so now let’s begin customizing the page.

Part 3: Customize the Opportunity Lightning Record Page

We will now incorporate all of the feedback from our Sales pilot into the Opportunity Page and create an optimized workspace for our sales reps. To do this, we are going to start from an Opportunity.

Select the Sales App in the App Launcher:
Once you select the Sales App, let’s type in “Burlington Textiles” into Global Search and select the “Burlington Textiles Weaving Plant Generator” Opportunity Record. This page is called the Opportunity Lightning Record Page is made up of Lightning Components. Lightning Components can be added or removed from the page based on the experience you want your users to have. We need to open the Lightning App Builder to customize the page. To do this, follow the following steps:

1. Select the Gear Icon in the upper right hand corner of the page and click on Edit Page.

2. Let’s start by removing the Related List Lightning Component from the page:
   a. Hover over the Related List.
   b. Click the X icon to remove.
3. Now let’s add the following components to the page:

   a. **Related List Quick Links** under the Path Component.

   b. **Related Record** Component under **Data.com Insights** Component.

      i. This Component needs to be configured as follows:

         1. Lookup Field: **Account Name**.

         2. Update Action: **Update Account**.

4. In the section with the Activity, Chatter, and Details Tabs, we are going to add another tab to view our Closed Opportunities by Month Report for this Account.

   a. Click into the Tab Component area and in the Configuration Pane, select the following:

      i. Add Tab.

         1. Click on the second “Details” in the list.

         2. Change the Tab Label to **Custom** and type in “**Opps. Closed QTD**”.

         3. Click on **Done**.

      ii. Select the new “**Opps. Closed QTD**” Tab.

      iii. Drag the **Report Chart** Component into this Tab.

      iv. Select the “**Closed Opportunities QTD**” Report and see the report chart rendered on the page.

5. Lastly, we are going to use the Set Component Visibility feature to show certain Related Lists when the Opportunity is in various stages.
a. Select the Related List-Single Component and configure as follows:

i. Related List: Products.

ii. Set Component Visibility.

1. Add Filter.
2. Field: Stage.
5. Select Done.

b. Select the Related List-Single Component and configure just as you did above:

i. Parent Record: Account Name.

ii. Related List: Contacts.

iii. Set Component Visibility.

1. Add Filter.
2. Field: Stage.
5. Select Done (Note: Notice the eye symbol on the new related lists. This indicates that this is a dynamic component).
Let’s save our work, activate the page, and review what we’ve done:

1. Select **Save**.

2. Select **Activate**.

3. Select **Assign as Org Default** (Note: This assigns the new page to everyone but you can assign it at a more granular level if you wish).

4. Select **Save**.

And now, let’s select the **Back** button to take us to review our work:

- In the Path, **select** the first green chevron, and **click** the arrow on the left. This opens up the Path to show the Key Fields for this stage and the guidance to help the reps to quickly move their Opportunities to the next stage.

- Under the Path component, you see the Related List Quick Links. **Hover** over one of them to see the Related List just as you did in Salesforce Classic.

- As we scroll down under the Related List Quick Links, we see on the right, Related Record component that shows the **Account Details** that are important to have at a glance without leaving the Opportunity.

- On the left of Account Details, **click** on the **Opps. Closed QTD** tab to see the amount closed by month for this account to give you an idea of how much the customer has bought from you.
• Lastly, let's see the related lists that are important during the Prospecting and Proposal/Price Quote Stage:

1. In the Path component:

   a. Select the **Prospecting Stage**.

   b. Select **Mark as Current Stage**.

   c. Scroll and look for the Contacts related list.

   d. Select the **Proposal/Price Quote Stage**.

   e. Select **Mark as Current Stage**.

   f. Scroll and look for the Products related list and note that the Contacts related list is gone.

Our updates incorporate all of the feedback from the pilot group. We are ready to roll Lightning Experience out to the rest of our sales users!