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.
  • 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

Tailor Your Case View with Lightning Experience Features
Abstract

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

Objective

Configure Case Record Page

- Case Action
- Path
- Dynamic Components

Launch URL

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

Part 1: Familiarize Yourself with the Default Case Lightning Record Page

You are ready to get your Service Agents into Lightning Experience, but want to make sure the Case page is optimized for their needs.

1. From the App Launcher (nine dots in the upper left hand corner), click on Service Console. This is the console app that Salesforce has created for you and is a great place to start!
Upon opening the Service Console, Cases should be the object that opens. Let’s navigate to a Case and take a look at the default page.

2. Click on the down arrow next to “Recently Viewed” and select the All Open Cases List View.

3. Open Case #00001002.

   a. You will see that the “All Open Cases” list view remains open on the left side in what we call a split view. This can be collapsed to give you a better view of the case details. Click on the little side arrow.
With the Case components in full view, let’s take a moment to see what is already on the default page.

4. Starting in the upper left, we see **Case Details** which consists of the most relevant Case fields that we view most often.

5. Under that are the Case’s Contact’s **Contact Details**. These are the Contact fields that we need to view/modify while working on a Case.

6. Under that are **Cases for Parent Contact**. These are all of the Cases that are related to the Contact on the Case.
   a. This is easily achieved with the **Related List - Single** component which allows you to see any single related list on the current object’s or on one of its parent record’s page layout.

7. In the middle, we have the **Highlights Panel** on the top.

8. Under that is the **Case Feed**.
   a. The Case Feed is used on the Case object to show all of the interactions that take place on the Case itself.
   b. It’s important to note that on almost every other object, the Highlights Panel shows all of the non-Activity and non-Chatter actions, but on a Case most all of those are now located within the Case Feed.

9. Lastly, on the right are all of the **Related Lists** that you have defined on the Case Page Layout.

**Part 2: Modify the Actions Available to Your Users in the Case Feed**

We feel like this is a great place for you to start, but your Agents may need to see their Cases in a little different way. Let’s first focus on those actions that we just talked about. Currently, we see Post, Email and Poll, but chances are that you will also need a way to Log a Call or to quickly update a case. To do so, we will want to focus on the Case Page Layout. There are a couple of different ways to get there, but we will focus on Edit Object within this workshop.

1. Click on the **Setup** icon in the upper right hand corner.

2. Select **Edit Object**. This will take you to the Case Object within the Object Manager.

3. Here, click on **Case Page Layouts**.

4. Select **Case Layout**.

5. Look for the section that says **Salesforce Mobile and Lightning Experience Actions**.
6. Under that section you will see the following text: “Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override”.

7. Click on the blue text to “override the predefined actions”.

8. Click on Mobile & Lightning Actions above to see all of the actions that you can bring onto your page:
9. Drag Email after Log a Call.
10. Remove Poll.
11. Add Update Case at the end of all of the actions.
12. Click Save.

Part 3: Modify the Case Lightning Record Page

With those actions added, we now want to add additional guidance for our agents as they work a Case from New to Resolved. To do this, we will add the Path component to the Case Record Page. We have already configured the Path here, but the Path can have up to five fields displayed in each step, as well as up to 1000 characters of rich text, and any Picklist field can be used for the Path. We have used Status for our Path here.

1. Click on the Setup icon in the upper right hand corner.
2. Select Edit Page. This will take you to the Lightning App Builder.
3. Find “Path” under the Standard Components on the left hand side. Drag it onto the page under the Highlights Panel.
4. Now that we have the Path added, let’s add the Rich Text component above the Highlights Panel.
5. Within the Rich Text component’s properties on the right hand side type “This case is escalated” in the text box.
6. Change the **font size to 72**.

7. Change the **text color to red**.

Awesome! We don’t need this to always appear on the Case page, though. So, we are going to incorporate dynamic visibility so that this only appears when the case truly has been escalated. To make a component dynamically visible:

8. Scroll to the bottom of the Rich Text component’s properties.

9. Under “**Set Component Visibility**” click “**Add Filter**”. Here, we will use a field on this record to determine visibility, but we could use a field from a parent record or a field from the user’s record.

10. With Record Field selected, remove **Case Number** by clicking on the ‘X’.

11. Select the **Status** field from the list of fields.

12. Leave **Equal** for the operator and select “**Escalated**” for the list of possible values.

13. Click **Done**.
You are almost there! You just have to save your changes.

14. Click **Save**. A new screen will appear with the option to Activate the page.

15. Click **Activate**.

You have a couple of options in how to activate a page. The Case Record Page in the Service Console already has an App Default, so you must save this page as an **App Default** in order to see it in the Service Console app.

16. Click **Assign as App Default**:

17. Assign as the App Default for the **Service Console**:
18. Click **Next**.

19. Click **Save**.

20. Click **Back** in the upper right hand corner (not the browser back button).

21. Now see the **Path** is on the Page.

22. Change the **Status to Escalated**.

23. Check out the Rich Text component now displayed at the top of the page!

You have now optimized the Case page for your agents and are ready to get a pilot group into Lightning!