

Salesforce Classic to Lightning Migration Guide

Brief Introduction

WalkMe is happy to provide you with guidelines for managing your Salesforce Classic-to-Lightning migration without facing any interruption in the benefits to your digital adoption that WalkMe brings. This guide provides you with a step-list of items that will occur during the migration process, as well as who will perform these steps.

Activating Salesforce Lightning requires additional steps not required in Salesforce Classic. As a result, Lightning requires a new Editor different from the one you were using for Classic. **If you agree to disable Salesforce Classic within three months of activating Salesforce Lightning**, you can replace your Classic Editor with a Lightning Editor for the same number of licenses specified in your original WalkMe agreement free of charge. Otherwise, you must purchase WalkMe for Salesforce Lightning prior to receiving a new Editor.

To initiate the process below, please reach out to your WalkMe contact.

Step-By-Step Migration Process

1. WalkMe will create a new WalkMe Editor for Salesforce Lightning;
2. WalkMe will enable the Lightning enabler feature;
3. WalkMe will add your new Editor to your extension and add regex to indicate when each extension will work;
4. **You must provide Lightning URLs for Sandbox and Production environments in order for us to update your extension.**
5. WalkMe will provide the new Editor to you;
6. If the Editor is added via the Enterprise feature, you will see the Editor upon your next login;
7. You must install the Salesforce Package by following these steps:
8. Download the Salesforce Installation Package for your [Test](#) and [Production](#) Environment;
 - Production:
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t0H000001Dytt>
 - Test:
<https://test.salesforce.com/packaging/installPackage.apexp?p0=04t0H000001Dytt>
9. Log in to Salesforce with your administrator account;
10. Select which users can access the WalkMe Setup Page. It is recommended to grant access to

all users;