# Salesforce Lightning Recommended Solutions

The Lightning Experience is the reimagined Salesforce CRM that lets sales reps work more quickly and efficiently. The mobile friendly platform lets users access information from anywhere, exactly when they need it.

Your WalkMe solutions of Salesforce Lightning help alleviate migration inefficiencies and productivity degradation that occurs as a result of the transition from Salesforce Classic. Your solutions also address the main challenge within CRMs, which is data quality. Use WalkMe for Salesforce Lightning to:

- Onboard users: Introduce users to the new system and give them tasks to complete
- **Change Management:** Point out new features available in Lightning, and compare to Salesforce Classic
- **Data Validation:** Provide contextual information to help users based on selections they make, and check they are entering Data correctly

# **Recommended Solutions**

## Introduction to New systems and Onboarding

Many of your users may be accustomed to Salesforce Classic, or are using a CRM for the first time. Use a Launcher and ShoutOut to give your users a heads up about specific changes that will affect their day to day responsibilities.



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Take your ShoutOut to the next level by using the Action to open the Player Menu with onboarding



tasks for the user to complete.

# Compare to Salesforce classic (Time Machine)

Help users get used to the new system by comparing features and screens to what they already know and familiar with.

|                | sforce Classic Interf<br>portunity Detail | ace             |  | Edit | Delete | Clone | • | Customer                          |
|----------------|---|-----------------|--|------|--------|-------|---|-----------------------------------|
|                |   | 04              | L                                      | Lon  | Delete | cione | _ | customer                          |
| Tes VO         | pportunity Information                    | 1               |  |      |        |       |   |                                   |
|                | Opp                                       | ortunity Owner  | Walkme [Change]                        |      |        |       |   |                                   |
| Opp            | Op  | portunity Name  | Testing Leah                           |      |        |       |   |                                   |
| Acc            |   | Account Name    | Test                                   |      |        |       |   |                                   |
| · · · · ·      |   | Туре            | Existing Business or Renewal           |      |        |       |   |                                   |
| Des            |   | Competitor      | 21AT                                   |      |        |       |   |                                   |
|                | Contract Rev                              | enue Start Date | 9/28/2016                              |      |        |       |   |                                   |
|                |   |                 | ************************************** |      |        |       |   | By WalkMe                         |
| CTIVITY        | COLLABORATE                               | DETAILS         | Show me Salesforce Classic Inter       | face |        |       |   | Account                           |
| Opportunity    | Information                               |                 |  |      |        |       |   |                                   |
| Opportunity Ov | wher                                      |                 | Amount                                 |      |        |       |   | No Data.com I<br>are available f  |
| () Walkme      |   |                 | \$35.00                                |      |        |       |   | compan                            |
| Opportunity Na | me  |                 | Close Date                             |      |        |       |   |                                   |
| Testing Leah   |   |                 | 9/27/2016                              |      |        |       |   | est Co News                       |
| Account Name   |   |                 | Stoge                                  |      |        |       |   | T&T Will Test C<br>TE-U and LTE-L |

Prevent Errors With a Field Advisor

On fields that users continually struggle, use a SmartTip. When users hover over a SmartTip, instructional text appears.



| Account Deta    | ls |                            |   | My J |
|-----------------|----|----------------------------|---|------|
|                 |    |                            |   | Acco |
| First Name *    | 1  | Johnny                     |   | Edit |
| Last Name *     | :  | Doe                        |   | Char |
| Email *         | :  | _doe@gmail.com             |   | Rece |
| Recovery email  | :  | 8                          | This should be different from your primary e-mail address | ]    |
| Location *      | ;  | United States d            |   | Acci |
| State *         | :  | 08                         |   | Mess |
| Current Image   | :  |                            |   | UnSu |
| Profile Image * | :  | Choose File No file chosen |   |      |

### Drop Down Mini Menu

Deflect support inquiries about the new system by adding smart Tips next to each option. When hovering over the SmartTips, a mini menu will appear providing guidance for the most commonly asked questions in that category.



| Please fill in the form t | What would you like to do? |                |
|---------------------------|----------------------------|----------------|
| Help Topic:               | Edit my account info       |                |
| General Inquiry 🥺         | Log me in as an Admin      |                |
|                           | Add a guest account        |                |
| Contact Inform            | Pick a different template  | Tick<br>Please |

Contextual Launchers Based on Selection

The Guidance your users require may change based on the selections they make. Help them be prepared with relevant information by placing Launchers on screen that respond to the selections a user makes on screen.



|              |                    | Edit Tech Startup                  |               | re 🔻           |
|--------------|--------------------|------------------------------------|---------------|----------------|
| rtui<br>I St | Mika Unterman      |                                    |               | New Note       |
|              | Private            | Expected Revenue                   |               |                |
|              | * Opportunity Name | * Close Date                       |               |                |
| $\sum$       | Tech Startup       | 6/5/2017                           | <b>#</b>      | ark Stage as ( |
|              | Account Name       | Next Step                          | Schedule a f  | ollow Up Call  |
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### Validate Data

Make sure your users are entering correct and valid data, whether they are new to the system or have been using it for years. Read more about the Check My Form play.



| * Opportunity Name                            |   | *Close Date   |  |
|---|---|---|--|
| Tech Startup                                  |   | 6/5/2017  |  |
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| Order Number                                  |   | Main Competitor(s)                                  |  |
| Current Generator(s)                          |   | Delivery/Installation Status                        |  |
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| Tracking Number                               | 7 |   |  |
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