

Lightning Lounge: Top Lightning Features in Spring '18

February 2018



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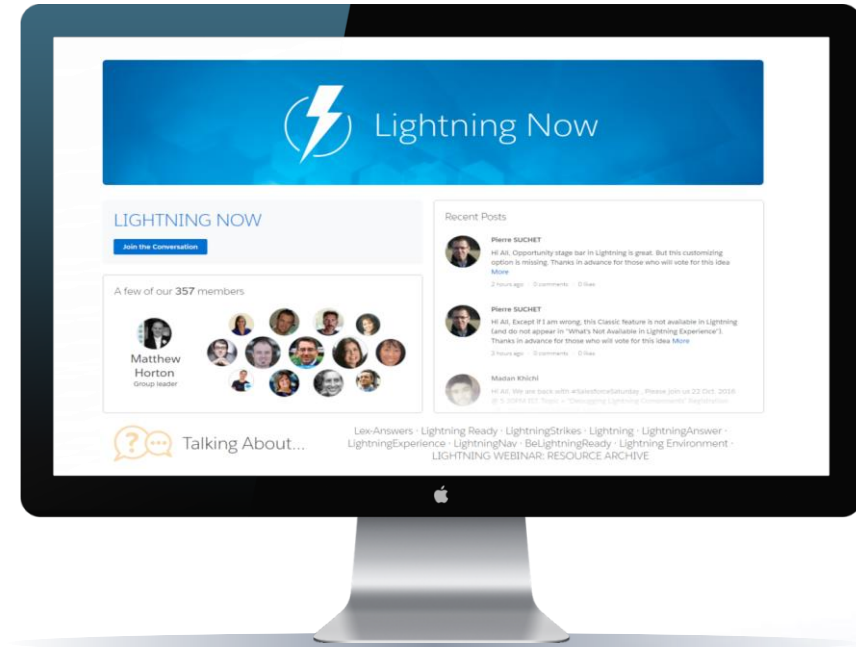
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First, some logistics

Questions, answers, and staying in touch.

- How do you ask a question?
Please ask in the **Lightning Now! Group**
<http://bit.ly/LightningNow> and use the
hashtag [#LightningLounge](#)
- Will this be recorded?
Yes!
- Where can you get the presentation?
In the Community
- Where can you go to get more information?
Use the [Lightning Now! Group](#)

salesforce





Today's Speaker



Jennifer Lee
Salesforce Business Consultant
John Hancock
@jenwlee

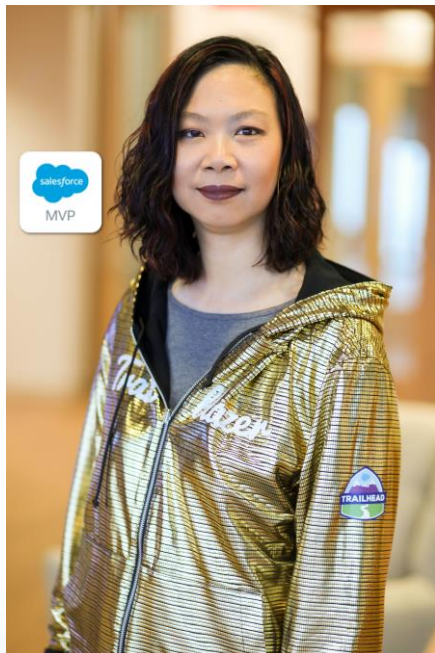


Agenda



- A little about me...
- A little about John Hancock...
- Learning about Lightning Experience
- My reaction to Spring '18
- Demo time!





Salesforce Business Consultant, John Hancock

2x Salesforce MVP, Summer '16-'17

3x Salesforce Certified

Blogger: Jenwlee.wordpress.com

Automation Hour Co-Host

Presenter: Dreamforce '16-'17, Boston & NYC World Tours,
Southeast Dreamin' 17, Salesforce User Groups

Trailhead Addict – 365 Badges

Social Media Manager for WiT Diversity (@WiT_Diversity)

2016 Boston World Tour #AwesomeAdmin Award
Recipient | LifeWithGoldie

Twitter: @jenwlee



Blog: jenwlee.wordpress.com



Jenwlee's Salesforce Blog

Sharing my love for Salesforce with my #Ohana

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Automation Hour



Co-Hosts: Rakesh Gupta, Jennifer Lee & David Litton



Date/Time: every other Friday, 3-4pm ET

Catch our previous recordings:

<http://bit.ly/AutomationHourVideos>

Trailblazer Community: [Salesforce Automation Hour](#)

Web site: AutomationHour.com

Upcoming Webinars:

- March 2: [Joey Len](#)
- March 23: [Amanda Matczynski](#)
- April 6: [MVP Leyna Hoffer](#)
- April 20: [MVP Cheryl Feldman](#)
- May 4: [Ashley Allen](#)
- May 18: [Michael Barnes](#)
- June 1: [Shannon Tran](#)
- June 15: [MVP Bonny Hinnners](#)



A Little About John Hancock...



7 Production Orgs	
Classic*	Lightning Experience
5	2

*1 BU in the process of transitioning to Lightning Experience



Learning About/Keep Up with Lightning Experience



[Trailhead.salesforce.com](https://trailhead.salesforce.com) (Search on the tag “Lightning”)



[Lightning Resources for Admins](#)



[Release Readiness & Feature Adoption](#) | [Lightning Now](#)



[Release Notes](#)

lightningNOWtour



[Lightning Now Tour](#)

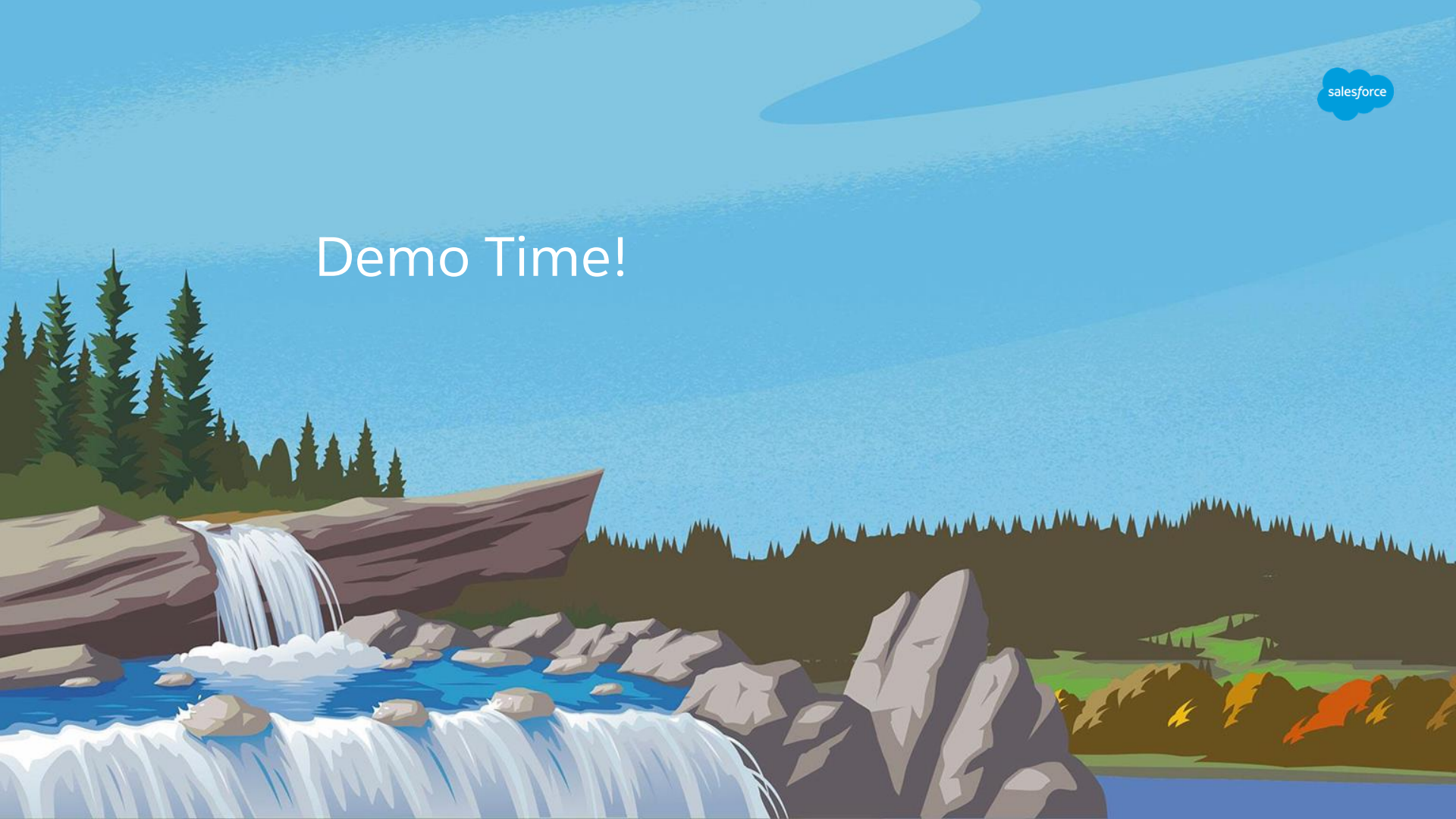


My Reaction to Spring '18



- First release with no Classic only enhancements!
- Lightning App Builder enhancements:
 - Accordion component, component visibility (related fields & other objects)
- Chatter enhancement:
 - Use hashtag to locate related posts
- Level Up on Flows with Lightning Components!
 - File upload
 - Dynamic fields, dependent picklists, lookup (<http://bit.ly/FlowScreenComponents>)
 - When creating Lightning Components for use with flow, include `<aura:component implements="lightning:availableForFlowScreens">`

Demo Time!



The Use Case



- Universal Containers (UC) is conducting a promotion for existing customers and solicit interest in a products from new customers.
- UC needs to collect the potential or existing customer's country and depending on the country, the province or state.
- For existing customers, UC needs to collect the promo code and the customer's selected prize.
- For potential customers, UC will ask whether the customer is interested in receiving information about the product and which product.
- Additionally, UC wants customers to upload any accompanying files.
- UC will track answers submitted, related to a contact.
- When a new “customer application” is created, a new chatter post is created with a hashtag #Winning.
- UC users like the additional information but there are some users who may want to collapse the information.
- Lastly, Sales users should not see the “customer application” module.



The Solution

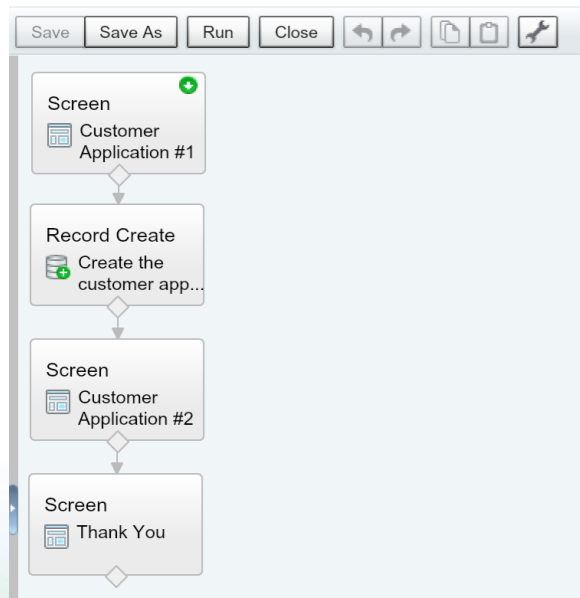


This flow uses the following components:

- Standard Lightning Component: File Upload
- Lightning Component Add-Ons: Lookup, Dynamic Fields and Dependent Fields
(<http://bit.ly/FlowScreenComponents>)

Flow Designer

This will only take a few minutes...



The Solution (Cont'd)



In Lightning App Builder,


- Used component visibility to show the flow component.
- Used the accordion component to re-organize the items on the page.

The screenshot displays a Salesforce Lightning App Builder interface for a contact record titled "Ms. Edna Frank". The interface is organized into several sections:

- Header:** Includes a search bar "Search Contacts and more...", a status bar showing "1.7s 2349.03 KB", and a user profile for "Jennifer Lee".
- Navigation:** A tab bar at the top shows "Accounts", "Contacts" (selected), "Cases", "Opportunities", "Customer Applications", and "Chatter".
- Contact Information:** A central section displays the contact's details: Name (Ms. Edna Frank), Email (efrank@genepoint.com), Phone (650) 867-3450, and Contact Owner (Jennifer Lee).
- Related List Quick Links:** A section on the left lists related items: Cases (3), Opportunities (0), Related Accounts (1), and Customer Applications (0).
- Additional Contact Details:** An accordion component on the left, titled "ADD'L INFO", contains a form with fields for "Premier Client?", "Primary Contact?", "Available Open Cases: 1", "00001037 | Need Help!!!", "Available Open Opportunities:", and "There are no associated open opportunities".
- Form Fields:** A central form area contains fields for Name, Email, Do Not Call, Phone, Home Phone, Birthdate, Other Address, Mailing Address, and Contact Owner.
- Modal Dialog:** A modal dialog titled "This will only take a few minutes..." is open on the right, showing a "Select Contact" dropdown, a "Select the country and the state or province" dropdown, a "Select:" dropdown, and a "Next" button.
- Cases List:** A section on the bottom right titled "Cases (3)" lists three cases: "00001037", "00001006", and "00001006", each with a "Need Help!!" button.

The Solution (Cont'd)





 Jen's App

Accounts ▾ Contacts ▾ Customer Applications ▾ Cases ▾ Opportunities ▾ Chatter

Search Customer Applications and more...

1.15% 2568.47 KB

⌵ ⌵ ? ⚙️ 🔔 

 Customer Application
App-000052

[+ Follow](#) [Delete](#)


DETAILS


Customer Application Name	Promo Code
App-000052	HELLOKITTY
Contact	Prize
Pat Stumuller	ipad
Country	Product Interest
Canada	
States	Product
Province	
Nova Scotia	
Created By	Last Modified By
Jennifer Lee , 2/14/2018 2:56 PM	Jennifer Lee , 2/14/2018 2:56 PM

CHATTER & FILES


Latest Posts ▾


Search this feed...




 [Jennifer Lee](#) to Jen's Company Only
February 14, 2018 at 2:56 PM

A new customer application submitted for Pat Stumuller. [#Winning](#)


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 Comment

1 view

 Write a comment...

Files (1)

 [KeyCustodianProfile](#)
Feb 14, 2018 • 2.5MB • jpg

Questions?



Resources



Key Resources for Spring '18



Webinars

[More Spring '18 Webinars](#)

[New Releases: Spring '18 Mastering Your Readiness Strategy](#) (recording)

[All Release Readiness Webinars and Recordings](#)



[Release Notes](#)

[Release Site](#)

[Spring '18 Treasure Hunt](#)

[Demo Videos](#)

[Release Overview Deck \(ROD\)](#)

[Spring '18 Blogs](#)

[Ideas Delivered in Spring '18](#)

[Spring '18 Milestones](#)

[Trust Site](#)

[Sandbox Preview Instructions](#)

The Future

[Lightning Roadmap](#)



A colorful illustration of a spring landscape. On the left, there are bushes with yellow, orange, and red flowers. A small stream flows through the middle ground. In the background, there are green hills and a blue sky with soft clouds. On the right, a brown bear wearing a white apron stands next to a small potted tree on a wooden stand, watering it with a blue watering can. Above the bear is the text "'18". Further right, a winding path leads towards a small wooden house with a chimney emitting a wisp of smoke. A large tree trunk is visible on the far right.

Spring '18 Release Overviews

Our top highlights from the next release

Join our Success Community Leads for Release Readiness as they showcase some of our top new features with plenty of **TONS OF LIVE DEMOS!!**

Recording now available!!



Watch Now

[Release Readiness Webinars &
Recordings](#)

[*CLICK HERE for other Regions & Languages](#)

Release Readiness Live



Our Spring '18 release is almost here and we want to make sure you have all the information you need to #BeReleaseReady! Watch the webcast series for in-depth descriptions of new features, demos, Q&A, and a peek into the roadmap for 2018.

Main Sessions

Sales Cloud
Service Cloud
Platform
Communities

[Developer Preview](#) | [Admin Preview](#)

Bonus Content

Email Apps
Quip
Health Cloud
Einstein Analytics
Marketing Cloud
Financial Services Cloud



Watch Now



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RELEASE READINESS & FEATURE ADOPTION

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A few of our 20,014 members



Recent Posts



Nima Jazbi

I will not be able to attend the webinar, will there be a recording for it ?
[More](#)

1 hour ago · 1 comments · 0 likes



Meryl Hankins

Clarification on sandbox refresh please. My sandbox is on preview instance and I want to keep it that way but I also want to refresh. MOST directions say to REQUEST the refresh before Sep 8 11:59p PDT, but I have seen a few places where the direction says the sandbox refresh must be COMPLETED before that date/time. Which is it??? Thanks! [More](#)

1 hour ago · 5 comments · 0 likes



Elna Miller

TAKE A PEEK into the #salesforcelive studio as we get ready for tomorrow's live broadcast September 9th - 9:30 a.m. - 10:45 a.m. Register: <http://bit.ly/Win17RRL> Developer Preview Live! Join our Developer Evangelist team for an overview of the new features for Developers.

Join our Community and always be informed.

- Review updates from moderators
- Ask questions
- Share your best practices and insights
- Collaborate with other customers

Also Join
[Lightning Now!](#)

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Take a journey with us today!



Success with Lightning

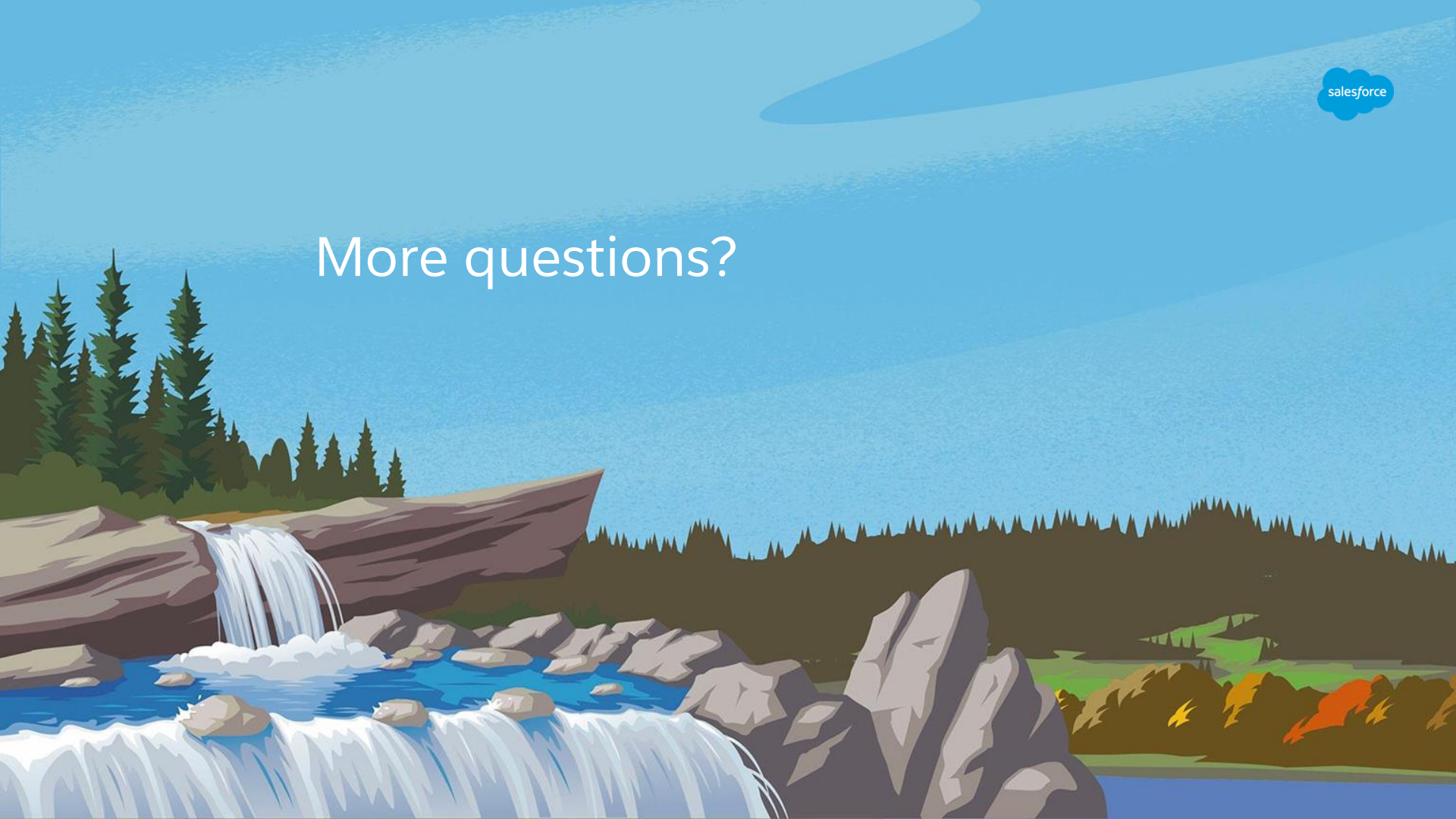
CONNECT WITH EXPERTS, GET BEST PRACTICES, AND LEARN WITH TRAILS

Discover Roll Out Optimize

The banner features a landscape illustration with a person and a small character on the left, a yellow path leading through a green field towards mountains, and several location pins with icons (crown, group of people, calendar, envelope, checkmark) along the path. Below the banner is a horizontal bar with three segments: "Discover" (blue), "Roll Out" (light gray), and "Optimize" (light gray), each with a right-pointing arrow.

[Get Started Here](#)

More questions?



THANK YOU

