Lightning Transition Helper App

The following application is best suited for the Lightning Platform. The Lightning Transition Helper App is an app geared towards helping Salesforce orgs transition from Salesforce Classic to Salesforce Lightning Experience. Built on the Salesforce Platform, this app will help users establish a rollout plan by setting a go-live date, defining the users to focus on, as well as modifying the experience for those users' needs. You will be given detailed tasks that take you through the rollout process. Within these tasks you will find resources with more information. The Lightning Transition Helper App will soon be available on the AppExchange. Questions? Follow the Lightning Transition Helper App Group on the Salesforce Community today for more information.

Discover and explore your very own Lightning Homepage with Lightning Transition Helper App

Welcome to your Lightning App Homepage! Here you will be able to view components such as your ongoing flow, paused flows, tasks to complete for the day, recent records, chatter feeds, and more. Scroll through your homepage to view everything related to your group and lightning transition readiness.

With three different ways to access your flow and/or tasks, easily keep track of tasks, and simply work towards your "go live" date. You can access tasks and flow through the homepage, toolbar (located at the bottom of the screen) and tasks tab (located at the top of the page)!

Lightning Transition Helper App Flow

Here is the where the process all starts! To begin, fill out the fields on the front page, which ask questions about your user group, group size, go live date, etc. After clicking next, you will then be taken to the first step, a screen consisting of tasks for you and your user group to begin reviewing. Feel free to click through the steps to get an idea for the process. The Lightning Transition Helper App will automatically generate your tasks into due dates, providing you and your team with simple, quick and easy reminders to stay on track in order to meet your go live date.

Click "yes" or "no" on each task to specify that you have either completed the task or have acknowledged it. The task will then record your answer, crossing it out if "yes" is chosen, staying in your daily tasks if "no" is chosen.

Along with each step and set of tasks are a resources section. Found at the bottom of each step, these links to resources provide additional help to ensure that you and your users fully understand the tasks you are reviewing, and can receive the help and assistance if needed.

You can pause your flow at any time, for any reason! Just click the pause button at the bottom of the flow to pause it. Your flow will be labeled as paused, and appear on the home page as a reminder to you, and for easy accessibility.

Today's Tasks

View your daily tasks here! Take a look at the Today's Task component, and view what's planned for you and your team for the day. Click on the checkbox next to each task here to clear it from your daily tasks. Click view all to be taken to the tasks tab, where you can view all tasks. If transitioning multiple user groups, click on the user group name underneath the tasks to view that group's full list of tasks.

Recent Records

View recent user groups that you have created and/or looked at. The 5 most recently viewed records will show. Easily and quickly access recent user groups from this component.

Chatter Feed

View your chatter feed for the app here! Track conversations with others, post updates and polls, ask questions and more!

Notes

Make and save notes for yourself or team!