

Walkthrough Content Kit: *Lightning Experience for Salesforce Classic Users*

These four walkthroughs provide interactive onboarding training that complements the [Lightning Experience for Salesforce Classic Users](#) module.

How to Use this Content Kit

Follow the inline  **HINTs** for suggestions on making this content more relevant to your org and its customizations. Edit away to make it your own.

 **HINT** Don't add the Hints to the walkthrough copy.

If you want to skip creating the walkthroughs yourself, install the associated {NAME} from the AppExchange, which includes the walkthroughs in this document.

After installing, go to **Setup** in Lightning Experience, enter and select **In-App Guidance** in the Quick Find box. The walkthroughs from the package are listed. Customize the schedule, profiles, permission, and status settings by clicking **Edit** from the row-level action menu. You can't edit the content or add, remove, or reorder the steps of walkthroughs installed from the package. If you want to change the content or page location, click **Clone**. You can't change the prompt type of cloned prompts.

Resources

- Trailhead: [User Engagement Module](#)
- Salesforce Documentation: [In-App Guidance in Lightning Experience](#)
- Knowledge Article: [In-App Guidance FAQs](#)

Unit 1: Get Your Bearings

The walkthrough introduces users to the basics: the Help Menu, profile and personal settings, and favorites.

Step 1	
Location	Sales App > Home page  <i>HINT Switch the location to the most popular starting page for your users.</i>
Prompt Type	Floating
Prompt Location	Top Center
Prompt Title	Let's explore your new workspace
Prompt Body	Lightning Experience may seem different than what you're used to, but Salesforce Classic core features made the journey with you. Get your bearings with this quick tour and video at the end.  <i>HINT Never used Salesforce Classic? Try this alternate text: "Welcome to your new workspace. Get your bearings with this quick tour."</i>
Dismiss Button	Dismiss
Step 2	
Location	Sales App > Home Page
Prompt Type	Floating
Prompt Location	Top Right
Prompt Title	Get help anywhere you need it
Prompt Body	Go to the header of any page and click the question mark to open the Help Menu. It's a curated list of resources that are specific to the page you're on and the actions you can do there.

	 <i>HINT If you have added a custom section to the Help Menu, add this sentence: "Custom help for is listed at the top of the Help Menu."</i>
Dismiss Button	Dismiss
Step 3	
Location	Sales App > Home Page
Prompt Type	Floating
Prompt Location	Top Right
Prompt Title	Find your profile and settings
Prompt Body	Click on the avatar in the top right corner to open the profile menu and click your name to get to your profile page. Take a moment to update your picture and banner.
Dismiss Button	Dismiss
Step 4	
Location	Sales App > Home Page
Prompt Type	Floating
Prompt Location	Top Right
Prompt Title	Create shortcuts to favorite pages
Prompt Body	To bookmark frequently-used records, lists, and groups, click the star icon in the header. Use the dropdown next to the star from any page and access your favorites.
Dismiss Button	Dismiss
Step 5	
Location	Sales App > Home Page
Prompt Type	Docked

Prompt Location	Not applicable - docked prompts are always lower right
Prompt Header	Lightning Experience Tips
Prompt Title	Take Lightning Experience for a spin
Video URL	https://play.vidyard.com/LfY-yg0tw_0A2YeLn42lsw
Prompt Body	Now that you know the basics, watch this short video to explore more about your new workspace. Thanks for taking this tour with us!  <i>HINT We've kept this walkthrough short, sweet, and around 5 steps. If you think your users want to know more about a feature mentioned, consider creating another short walkthrough based on the information in the Trailhead module.</i>

Unit 2: Navigate Around

The walkthrough helps users quickly get to the records that matter the most to them with the App Launcher and navigation bar.

 *HINT This walkthrough is written for the standard app. If you're using a console app, consider highlighting some of the console features from the unit instead. [Learn more about the difference between standard and console.](#)*

Step 1	
Location	Sales App > Home page  <i>HINT Switch the location to the most popular starting page for your users.</i>
Prompt Type	Floating
Prompt Location	Top Center
Prompt Title	Ready..set...find your records

Prompt Body	Navigating in Lightning Experience is simple. Let's go over the quickest way to find what you need.  <i>HINT Try this alternative text: "Quickly find the records and items you need by learning how to navigate in Lightning Experience."</i>
Dismiss Button	Dismiss
Step 2	
Location	Sales App > Home page
Prompt Type	Floating
Prompt Location	Top Left
Prompt Title	Switching apps is a breeze
Prompt Body	Use the App Launcher (nine dots icon, top left) to quickly change apps. Or, search for any app, object, or item that you have permission to use.
Dismiss Button	Dismiss
Step 3	
Location	Sales App > Home page
Prompt Type	Floating
Prompt Location	Top Center
Prompt Title	Your home base for navigating around
Prompt Body	Use the navigation bar to access objects, the main Chatter feed, groups, reports and dashboards, and the other major features that you use.  <i>HINT List the objects and items that appear in the navigation bar of the app to which you're adding the walkthrough.</i>

Dismiss Button	Dismiss
Step 4	
Location	Sales App > Home page
Prompt Type	Docked
Prompt Location	NA
Prompt Header	Navigation Bar Tips
Prompt Title	Personalize your navigation bar
Video URL	https://play.vidyard.com/JgMPthKFTK68JeZpJx8MXH
Prompt Body	Watch this video to see how easy it is to make the navigation bar your own.
Step 5	
Location	Sales App > Home page
Prompt Type	Floating
Prompt Location	Top Right
Prompt Title	You're ready to go
Prompt Body	Remember to use the down arrow next to items in the navigation bar for recent items, favorites, and common actions.
Dismiss Button	Dismiss

Unit 3: Work with List Views

The walkthrough helps users with creating, editing, and consuming data from lists.

Step 1	
Location	Sales App > Account list view

	💡 <i>HINT Switch the location to the most popular starting page for your users. Create multiple walkthroughs for different objects or user groups.</i>
Prompt Type	Floating
Prompt Location	Top Center
Prompt Title	Get to know the power of list views
Prompt Body	List views are a great way to sort, prioritize, and analyze the records that are most important to you. Let's take a look now.
Dismiss Button	Dismiss
Step 2	
Location	Sales App > Account list view
Prompt Type	Floating
Prompt Location	Top Center
Prompt Title	Change up your view
Prompt Body	Use the down arrow next to Recently Viewed to change your list view. Want a new default list to appear? Select a different list and pin it. 💡 <i>HINT If you can suggest a good list view to pin, add it here. For example: "Select the My Cases list view and pin it."</i>
Dismiss Button	Dismiss
Step 3	
Location	Sales App > Account list view
Prompt Type	Floating
Prompt Location	Top Center

	 <i>HINT Users can move the prompt around if it's blocking something on the page.</i>
Prompt Title	See the whole picture
Prompt Body	Tired of seeing only part of each field in a list view? Click the down arrow in the column header and select Wrap text or Clip text.
Dismiss Button	Dismiss
Step 4	
Location	Sales App > Account list view
Prompt Type	Floating
Prompt Location	Top Left
Prompt Title	Make the list view your own
Prompt Body	Click the pencil icon on the right to update the included fields in your list. If you want to narrow your custom list view, click the funnel icon to add, modify, or remove filters.
Dismiss Button	Dismiss
Step 5	
Location	Sales App > Account list view
Prompt Type	Docked
Prompt Location	NA
Prompt Header	List View Tips
Prompt Title	Explore more about list views
Video URL	https://play.vidyard.com/4ahjpdBTNWZ5EgZds9dJf1
Prompt Body	Now that you know the basics, watch this short video to explore more about list views. Thanks for taking this tour with us!

Unit 4: Work with Your Data

The walkthrough helps users work with records in Lightning Experience and how the experience differs from Salesforce Classic.

Step 1	
Location	Sales App > Leads record  <i>HINT You can also start on Opportunities home.</i>
Prompt Type	Floating
Prompt Location	Top Center
Prompt Title	Meet the new record layout
Prompt Body	Lightning Experience streamlines records by balancing things out across different tabs. This approach cuts down on scrolling and makes it faster to find the desired information.
Dismiss Button	Dismiss
Step 2	
Location	Sales App > Leads record
Prompt Type	Floating
Prompt Location	Top Center
Prompt Title	Close deals faster
Prompt Body	The Leads and Opportunities workspace is optimized for action and includes everything sales teams need to qualify and convert leads or close deals, like the Sales path.
Dismiss Button	Dismiss
Step 3	
Location	Sales App > Account record

Prompt Type	Docked
Prompt Location	NA
Prompt Header	Record Tips
Prompt Title	Stay up to date on accounts
Prompt Body	When you're working with accounts and contacts, you want to find information fast. So these records are optimized for quick reference and at-a-glance insights. • See a summary of a record's most important details at the top of the page in the highlights panel. • All record fields are grouped together on the Details tab. • Create new tasks, events, or emails and log calls on the Activities tab. • Collaborate with colleagues on the Chatter tab.  <i>HINT Change the bullet list to include only items that you have on the account record page. If you have a short video that walks users through a record page, add it here and remove the bulleted list. You may also want to move this step to a specific record.</i>
Step 4	
Location	Sales App > Account record
Prompt Type	Floating
Prompt Location	Bottom Left
Prompt Title	Related lists offer easy access
Prompt Body	The Related tab includes a collection of related list cards. Each card displays up to six records, so click View All to see more.  <i>HINT Change the text if the related lists are grouped together on either side of the page.</i>

Dismiss Button	Dismiss
Step 5	
Location	Sales App > Account record
Prompt Type	Floating
Prompt Location	Top Center
Prompt Title	Learn more about records
Prompt Body	There's more to learn about records, including customizing the related lists you see and performing custom actions from the record page.
Dismiss Button	Dismiss
Action Label	Tell Me More
Action URL	https://help.salesforce.com/articleView?id=lex_find_record_layout.htm