



Admin Tip: How to migrate from Classic to Lightning with Automation

Step: 01

let's learn how to easily switch from Salesforce Classic to Salesforce Lightning.

The screenshot displays the Salesforce Lightning user interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below this is a secondary navigation bar with tabs for Sales, Home, Accounts, Opportunities, Leads, Tasks, Files, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, and More. The main content area is divided into several sections:

- Quarterly Performance:** A line chart showing performance metrics for October, November, and December. The chart includes a goal line at 300k, a closed line at 100k, and a combined closed + open line. A tooltip is overlaid on the chart with the text: "let's learn how to easily switch from Salesforce Classic to Salesforce Lightning."
- Assistant:** A panel on the right side of the dashboard with a tree icon and the text: "Nothing needs your attention right now. Check back later."
- News:** A section at the bottom left containing four news items related to Microsoft, such as "Microsoft HoloLens 2 preorder 'now shipping' contradictions" and "Microsoft continues broadband efforts".
- MyGuide:** A small icon in the bottom left corner.

Step: 02

Click on View Profile Icon

The screenshot shows the Salesforce dashboard interface. At the top, there is a navigation bar with the Salesforce logo, a search bar labeled "Search Salesforce", and a navigation menu with items like Sales, Home, Opportunities, Accounts, Tasks, Leads, Files, Contacts, Campaigns, Chatter, Groups, and Calendar. A callout box with the text "Click on View Profile Icon" points to the profile icon in the top right corner. Below the navigation bar, the main dashboard area is divided into several sections: "Quarterly Performance" with a bar chart showing sales data for November, December, January, and February; "Today's Events" and "Today's Tasks" sections with decorative icons; and an "Assistant" panel on the right side displaying a list of tasks and alerts. The "Assistant" panel includes items like "Opportunity has overdue tasks demo test", "30 days without any activity as", "30 days without any activity demo", "30 days without any activity Demo Test", and "30 days without any activity de". At the bottom left, there is a "MyGuide" logo.

Step: 03

Click on "Switch to Salesforce Classic"

The screenshot displays the Salesforce Lightning interface. At the top, there is a navigation bar with the 'Sales' tab selected and various sub-tabs like 'Home', 'Accounts', 'Opportunities', etc. Below the navigation bar, the main content area is divided into two sections. The left section, titled 'Quarterly Performance', shows a line graph with a y-axis ranging from 0 to 120k and an x-axis with months 'Oct', 'Nov', and 'Dec'. The graph shows a blue line representing 'Closed + Open (>70%)' which is rising towards a green horizontal line representing the 'Goal' at 100k. The right section is the 'Assistant' panel, which includes the user profile for 'Sandra Shaw' and a 'DISPLAY DENSITY' dropdown menu set to 'Comfy'. In the 'OPTIONS' section of the user menu, the 'Switch to Salesforce Classic' link is highlighted with a white callout box containing the text 'Click on "Switch to Salesforce Classic"'. Below the main content area, there is a 'myGuide' section with a search bar and a list of recently viewed guides.

Step: 04

Welcome to Salesforce Classic Experience. To go back, click on "Switch to Lightning Experience".

The screenshot displays the Salesforce Classic Experience user interface. At the top, the Salesforce logo is on the left, and a search bar is in the center. On the right, there is a link to "Switch to Lightning Experience" and a notification that says "Developing GoSalesTrain, latest version". Below the search bar is a navigation menu with tabs for Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, Reports, and Knowledge. A left sidebar contains sections for "Create New...", "Shortcut" (with "Unresolved Items"), "Recent Items" (listing "MyGuide-Microsoft (Dynamics (User Migration from Salesforce to Dynamics))", "Microsoft", "Satya Nadella", and "Sandra Shaw"), "Custom Links", and "Recycle Bin". The main content area shows a user profile for Sandra Shaw, dated Monday, November 11, 2019. Below the profile is a "Hide Feed" button and a "Post" section with a text input field and a "Share" button. A "Recommendations" section on the right suggests downloading Salesforce and following Microsoft and Satya Nadella. A post by Sandra Shaw asks, "How can we collaborate on an account?" with two radio button options: "Multiple owners inside an account with multiple opps" and "primary owner in an account". Below this is a "Vote" button showing 0 votes. Another post by Sandra Shaw asks, "What do you think of latest white paper on GuideMe? Have you checked out latest paper on GuideMe?" with an "Answer" button and a "Like" button.

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