

# Making the Switch to Lightning

The Right Time is Now

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# Bracket Labs Overview

Salesforce App Vendor, makers of TaskRay

Project Management Application

Focus on Post-sale process and customer onboarding

Early adopters of Lightning Component development

- 10+ Lightning Components

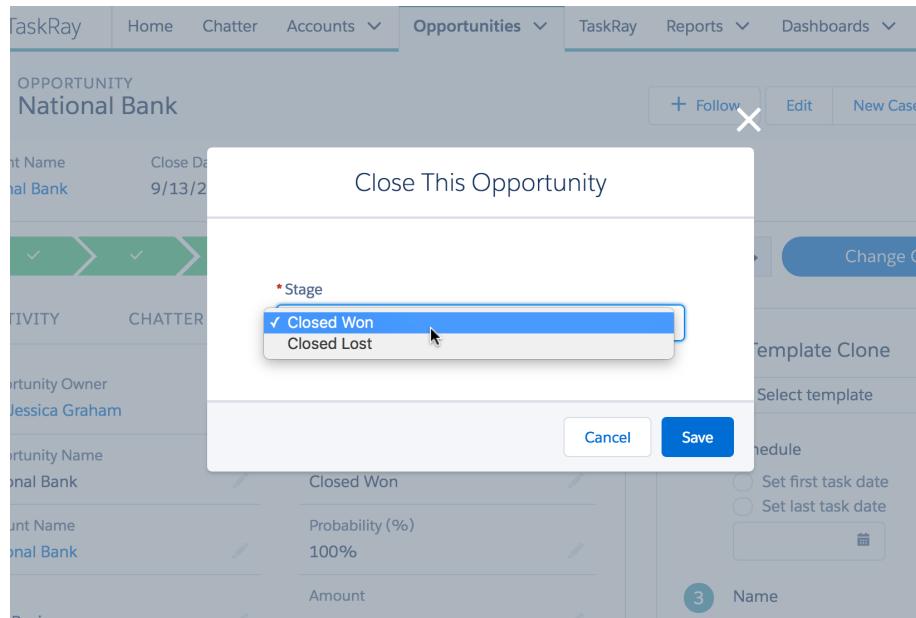
Lightning Experience Launch Partner

Our co-founder Blakely was featured during the Lightning Experience launch



# TaskRay Modern Project Management

## Pain-Free Customer Onboarding



# Where we were

Logged in as Blake Ashwin (blake@winter17.com)

Blake Ashwin ▾ Setup Help & Training TaskRay ▾

Home Chatter TaskRay Files Reports Dashboards +

BOARD FILTERS

My Tasks My Projects Power Filter Favorites Single Project Search Show More Show Less

PROJECTS

Select All / Deselect All

- Dreamforce
- National Bank Customer Success
- National Bank New Customer Onboarding
- New Customer Onboarding
- New Hire Onboarding

MY PROJECTS > NATIONAL BANK NEW CUSTOMER ONBOARDING > ALL TASKS

Holding 0 Prioritized 2 Started 1 Finished 7

Provide report to account manager  
National Bank New Customer On... 9/17/2016

Send thank you gift  
National Bank New Customer On... 9/23/2016

Finalize deliverables  
National Bank New Customer On... 9/24/2016

Send email updates  
National Bank New Customer On... 9/16/2016

Review requirements  
National Bank New Customer On... 9/16/2016

Customer kickoff meeting  
National Bank New Customer On... 10/1/2017

Training, Q&A  
National Bank New Customer On... 9/16/2016

Customer requirements review  
National Bank New Customer On... 10/15/2017

Identify long-term goals  
National Bank New Customer On... 11/19/2017

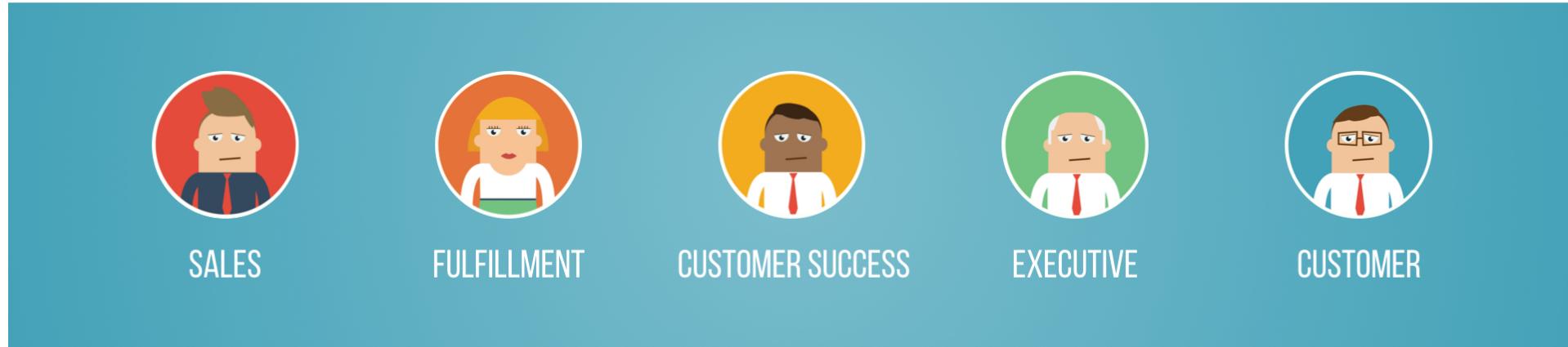
Identify short-term goals  
National Bank New Customer On... 11/5/2017

TEAM FEED FILES

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# Where Lightning Has Taken Us



PROCESS  
AUTOMATION



INTERFACE  
DESIGN



LIGHTNING  
COMPONENTS



BUSINESS  
INTELLIGENCE



LIGHTNING BOLT  
QUICKSTART



TaskRay + Lightning



# Adoption

## Customizing Lightning Experience

The screenshot displays the Salesforce Lightning Experience interface for an account record. The top navigation bar includes the TaskRay logo, a search bar, and standard navigation links like Home, Chatter, Accounts, Opportunities, TaskRay, Reports, and Dashboards. The main content area shows an account record for "National Bank". Below the header, there are fields for Type, Phone, Website, Account Owner (Jessica Grah...), Industry, and Billing Address. A "TaskRay" tab is selected in the ribbon, revealing a "TaskRay To Do" section. This section lists three items: "Send thank you gift" (HOLDING, 1), "Provide report to account manager" (PRIORITYZED, 1), and two "STARTED" tasks: "Finalize deliverables" and "Training, Q&A". To the right of the main content, there are three cards: "TaskRay Status (1)" showing a progress bar at 50% from 9/21/2017 to 12/31/2017; "TaskRay Snapshot (1)" showing a donut chart with counts for Holding, Prioritized, Started, and Finished tasks; and "TaskRay Template Clone".



# Lightning App Builder

Lightning App Builder - Account Record Page

← Back ? Help

Desktop Shrink To View Refresh

Save Activation...

Lightning Components

Search components...

Custom (0)  
No components available.

Custom - Managed (10)

- TaskRay Board
- TaskRay Feed
- TaskRay Kanban
- TaskRay My Projects
- TaskRay Project Clone
- TaskRay Snapshot
- TaskRay Status
- TaskRay Time Entry
- TaskRay To Dos
- TaskRay Today

Get more on the AppExchange

ACCOUNT National Bank

Type Phone Website Account Owner Jessica Grah... Industry Billing Address

+ Follow Edit New Contact New Case

RELATED DETAILS TASKRAY

Contacts (0) Opportunities (1) Cases (0) Notes & Attachments (0) TaskRay Tasks (6+) TaskRay Projects (2)

National Bank Stage: Closed Won Amount: Close Date: 9/13/2016

View All

Schedule kick-off meeting Customer Success Started 10/5/2016  
Send welcome email Customer Success Finished 9/23/2016  
Webinar invite Customer Success Started 9/23/2016  
Schedule monthly check-in call Customer Success Prioritized 9/30/2016  
Prepare quarterly reports Customer Success Holding 10/28/2016  
Update usage metrics Customer Success Prioritize 9/23/2016

View All

TaskRay Snapshot (2) Customer Success < >

TaskRay Status (2) Customer Success < >

TaskRay Template Clone

- Select template
- Schedule  
 Set first task date  
 Set last task date
- Name
- Create

Page

\* Label Account Record Page

\* Developer Name Account\_Record\_Page

Page Type Record Page

Object Account

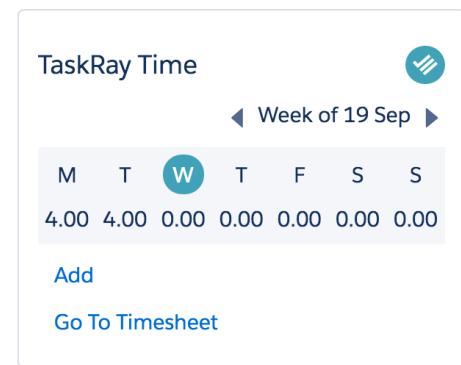
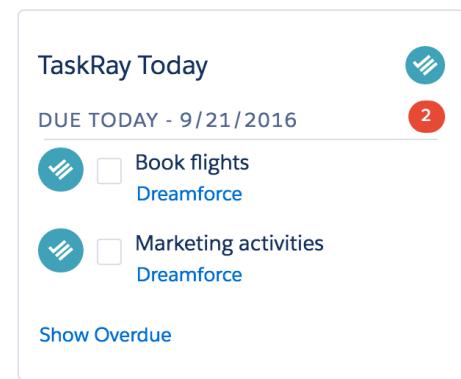
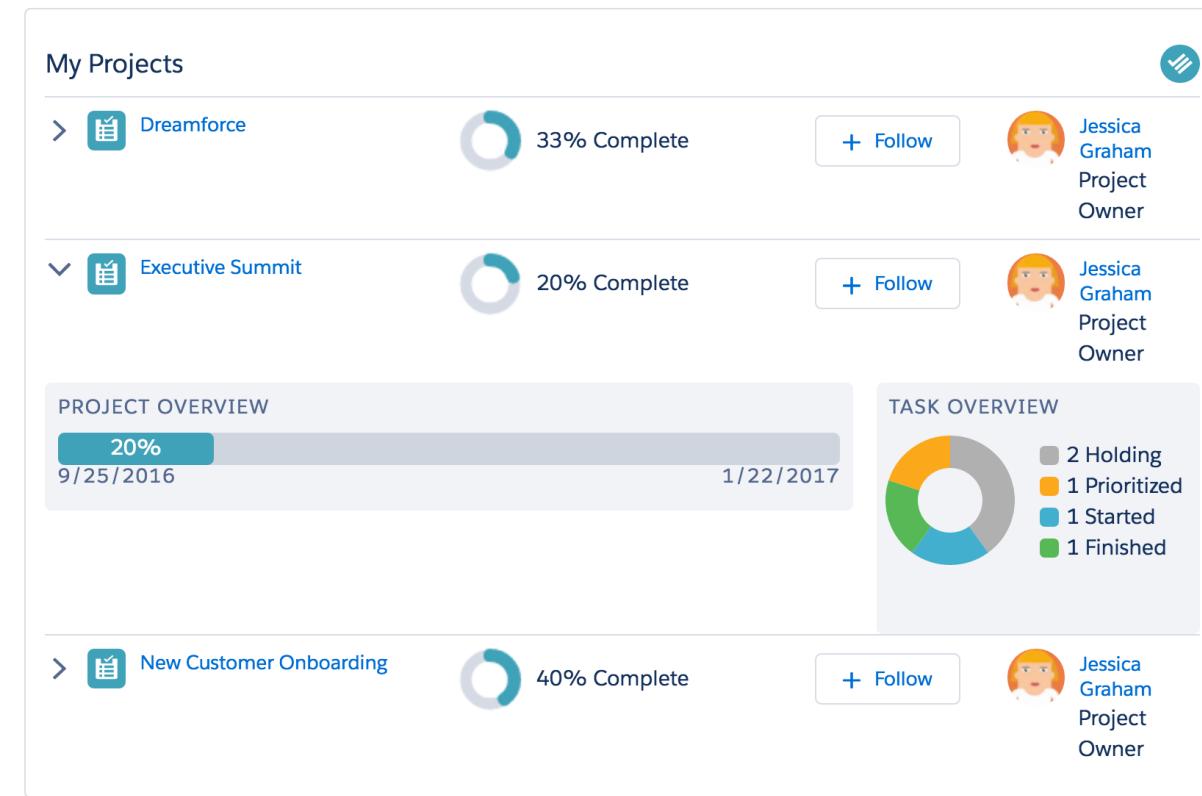
Template Header and Two Columns

Description



# Adoption

## Community Cloud



# Community => Accurate data everywhere

The screenshot shows the TaskRay application interface. At the top, there's a navigation bar with icons for Home, TaskRay, and Files. On the right side of the header, there's a user profile for "LEANNE T." with a dropdown arrow.

The main area is a Kanban board titled "MY PROJECTS > 3 PROJECTS > ALL TASKS". It has three columns: "Holding" (4 tasks), "Started" (3 tasks), and "Finished" (6 tasks). Each task card includes details like the task name, due date, project, and various action icons (e.g., edit, delete, share).

On the left, there's a sidebar with "BOARD FILTERS" and "PROJECTS". Under "BOARD FILTERS", "My Tasks" is selected. Under "PROJECTS", "Dreamforce" and "Executive Summit" are checked. Other projects listed are "New Customer Onboarding" (unchecked) and "Power Filter".

At the bottom of the page, there's a decorative footer featuring green mountains and a blue cloud containing the word "salesforce".

Column	Task Details	Due Date	Project
Holding	Prepare company materials	9/30/2016	Dreamforce
	Prepare meeting agenda	11/7/2016	Executive Summit
	Progress report	11/18/2016	New Customer Onboarding
	Send thank you gift	10/14/2016	New Customer Onboarding
Started	Prepare welcome package	9/23/2016	Dreamforce
	Put together the invite list	10/9/2016	Executive Summit
	Customer requirements review	10/1/2016	New Customer Onboarding
Finished	Put together the invite list	9/6/2016	Dreamforce
	Book flights	9/23/2016	Dreamforce
	Book hotels	10/10/2016	Dreamforce
	Determine meeting goals	9/25/2016	Executive Summit
	Finalize deliverables	9/23/2016	New Customer Onboarding
	Customer kickoff meeting	9/11/2016	New Customer Onboarding

salesforce

# What is it like building and supporting?

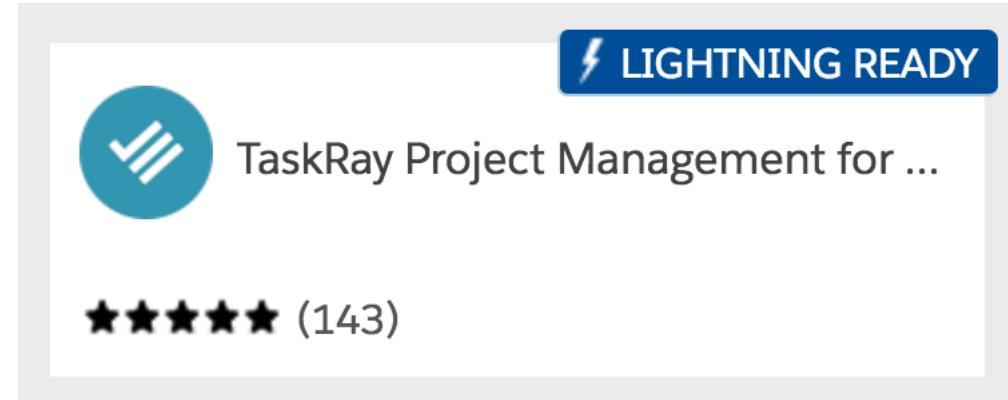
How Bracket Labs is supporting the switch?

## Building

- Design System
- Components
- Automation

## Supporting

- New Interface
- New Builders
- Component configuration



# What's Next?

Go even wider

- Components outside Salesforce
- Enhance our components within SF1
- Listen



# Lessons Learned

- Change your thinking
- Support the switch with training
- Dangle carrots to help people switch



# Q&A





salesforce

# Title Slide B

## Subtitle placeholder

Presenter Name  
Title of Presenter

[email@sforce.com](mailto:email@sforce.com)  
@twitterhandle



salesforce

# Title Slide C

Subtitle placeholder

Presenter Name

Title of Presenter

[email@salesforce.com](mailto:email@salesforce.com)

@twitterhandle



# Title Slide D

Subtitle placeholder

Presenter Name  
Title of Presenter

[email@salesforce.com](mailto:email@salesforce.com)  
@twitterhandle

salesforce

# Basic Layout

Subtitle placeholder 24 points

First level text is set at 20 point Salesforce Sans and does not have a bullet

- Second line bullets are 18 point Salesforce Sans
  - Third level text is set at 16 point Salesforce Sans
  - Limit the number of bullets on a slide
    - Fourth level text

How to Create a Paragraph Heading

Use the same Basic Layout and remove second line bullet from sentence

Spacing of Paragraphs

The spacing between paragraphs is automatically set



# Basic Layout – Mountain Footer

Subtitle placeholder 24 points

First level text is set at 20 point Salesforce Sans and does not have a bullet

- Second line bullets are 18 point Salesforce Sans
  - Third level text is set at 16 point Salesforce Sans
  - Limit the number of bullets on a slide
    - Fourth level text

How to Create a Paragraph Heading

Use the same Basic Layout and remove second line bullet from sentence

Spacing of Paragraphs

The spacing between paragraphs is automatically set



# 2-Column Layout

## Subtitle placeholder

Either of these placeholders can hold text, table, charts, smart art, or media.

Either of these placeholders can hold text, table, charts, smart art, or media.



# 2-Column Layout – Mountain Footer

Subtitle placeholder

Either of these placeholders can hold text, table, charts, smart art, or media.

Either of these placeholders can hold text, table, charts, smart art, or media.



# 3-Column Layout

## Subtitle placeholder

These three placeholders can hold text, table, charts, smart art, or media.

These three placeholders can hold text, table, charts, smart art, or media.

These three placeholders can hold text, table, charts, smart art, or media.



# 3-Column Layout - Mountain Footer

## Subtitle placeholder

These three placeholders can hold text, table, charts, smart art, or media.

These three placeholders can hold text, table, charts, smart art, or media.

These three placeholders can hold text, table, charts, smart art, or media.



# 3-Column With Titles

Subtitle placeholder

## Salesforce Content

Lorem ipsum dolor sit amet,  
consectetur

Cras egestas mauris ut  
faucibus cursus

Pellentesque et risus ac  
turpis maximus

## Salesforce Content

Lorem ipsum dolor sit amet,  
consectetur

Cras egestas mauris ut  
faucibus cursus

Pellentesque et risus ac  
turpis maximus

## Salesforce Content

Lorem ipsum dolor sit amet,  
consectetur

Cras egestas mauris ut  
faucibus cursus

Pellentesque et risus ac  
turpis maximus

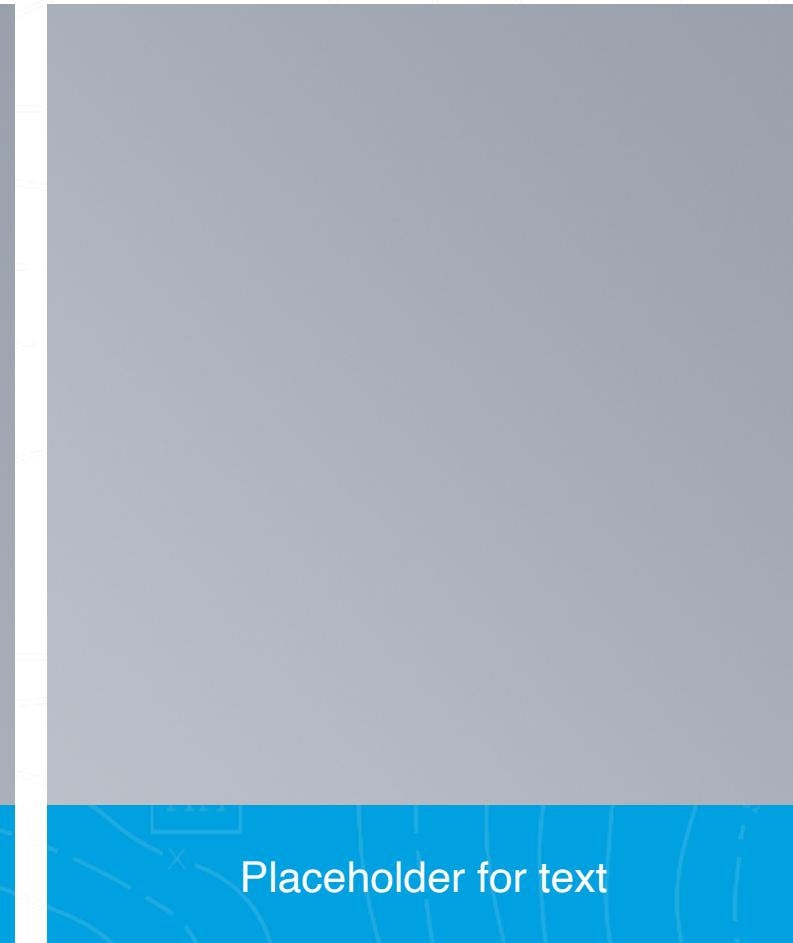
Subtext placeholder

Subtext placeholder

Subtext placeholder

# 3-Column Photos Layout

Subtitle placeholder



# 4-Column Layout

## Subtitle placeholder

These placeholders can hold text, tables, charts, images, or media.

These placeholders can hold text, tables, charts, images, or media.

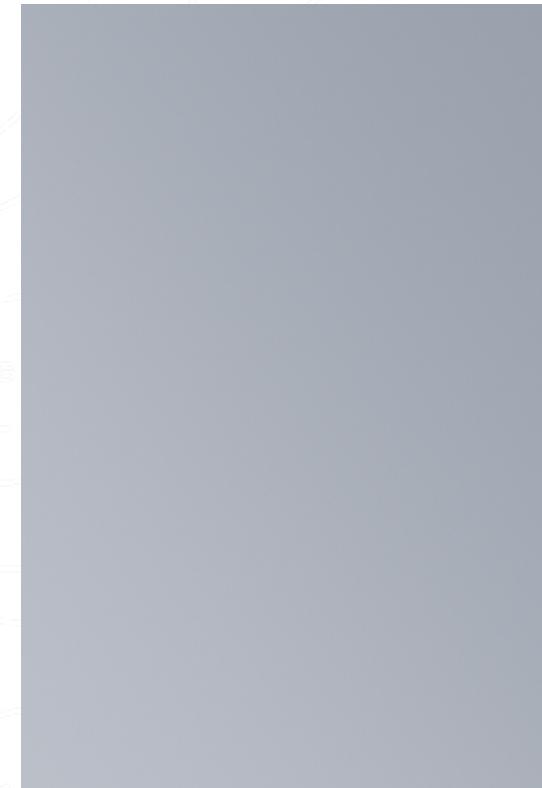
These placeholders can hold text, tables, charts, images, or media.

These placeholders can hold text, tables, charts, images, or media.



# 4-Column Footer Layout

Subtitle placeholder



Salesforce Content

Salesforce Content

Salesforce Content

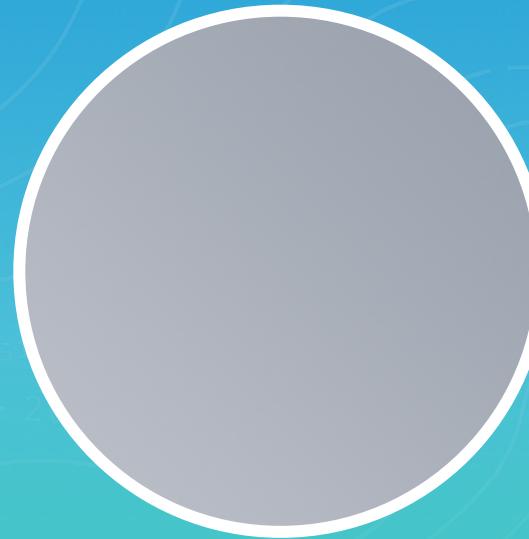
Salesforce Content

## Chapter 1



Lorem ipsum dolor sit  
amet, consectetur  
Cras egestas mauris ut  
faucibus cursus  
Pellentesque et risus ac  
turpis maximus

## Chapter 2



Lorem ipsum dolor sit  
amet, consectetur  
Cras egestas mauris ut  
faucibus cursus  
Pellentesque et risus ac  
turpis maximus

## Chapter 3



Lorem ipsum dolor sit  
amet, consectetur  
Cras egestas mauris ut  
faucibus cursus  
Pellentesque et risus ac  
turpis maximus

## Chapter 4

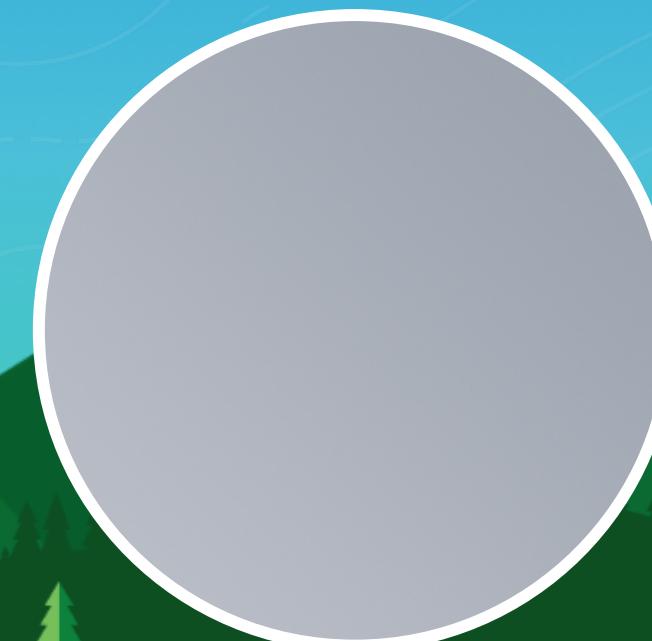
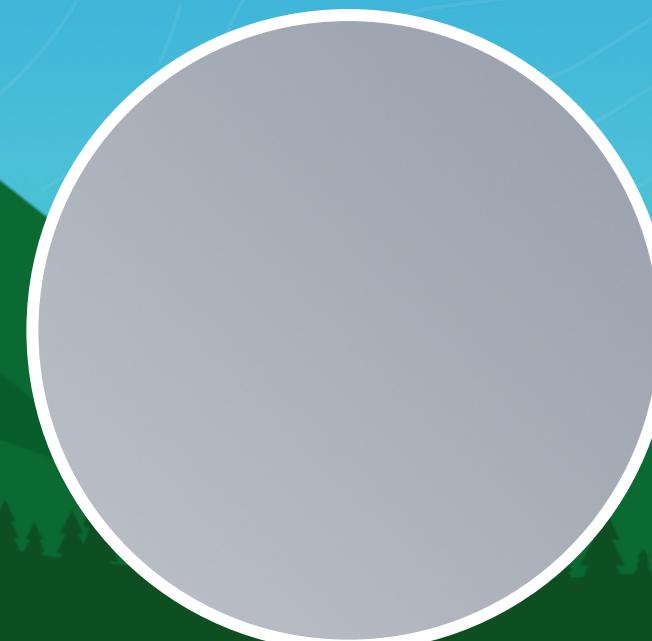


Lorem ipsum dolor sit  
amet, consectetur  
Cras egestas mauris ut  
faucibus cursus  
Pellentesque et risus ac  
turpis maximus

# Chapter 1

# Chapter 2

# Chapter 3



X  
AN

class  
- container  
home  
value  
navigation  
DOCTYPE  
- </div>  
username

Chapter 1

Chapter 2

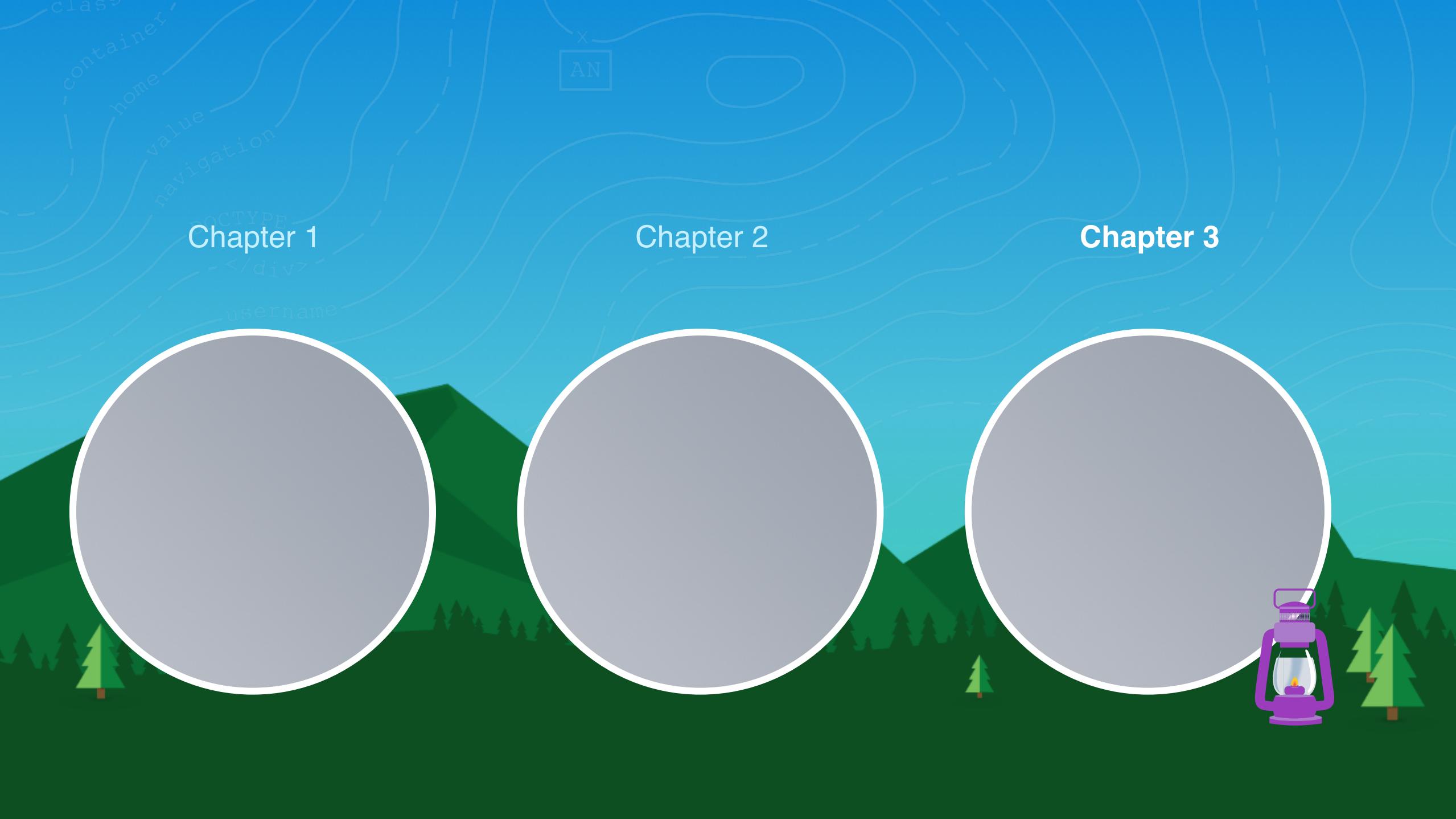
Chapter 3

X  
AN

**Chapter 1**

**Chapter 2**

**Chapter 3**



“Quote”

Tab indent for name

Logo

## Customer Hero A

You may need to reset layout in layout pull down menu to reset

You may need to crop and resize aspect ratio of images to create circle

Use line spacing to create more or less space between lines



Logo

## Customer Hero B

You may need to reset layout in layout pull down menu to re set all of the elements

You may need to crop and resize aspect ratio of images within the mask so image doesn't stretch

Use line spacing to create more or less space between lines

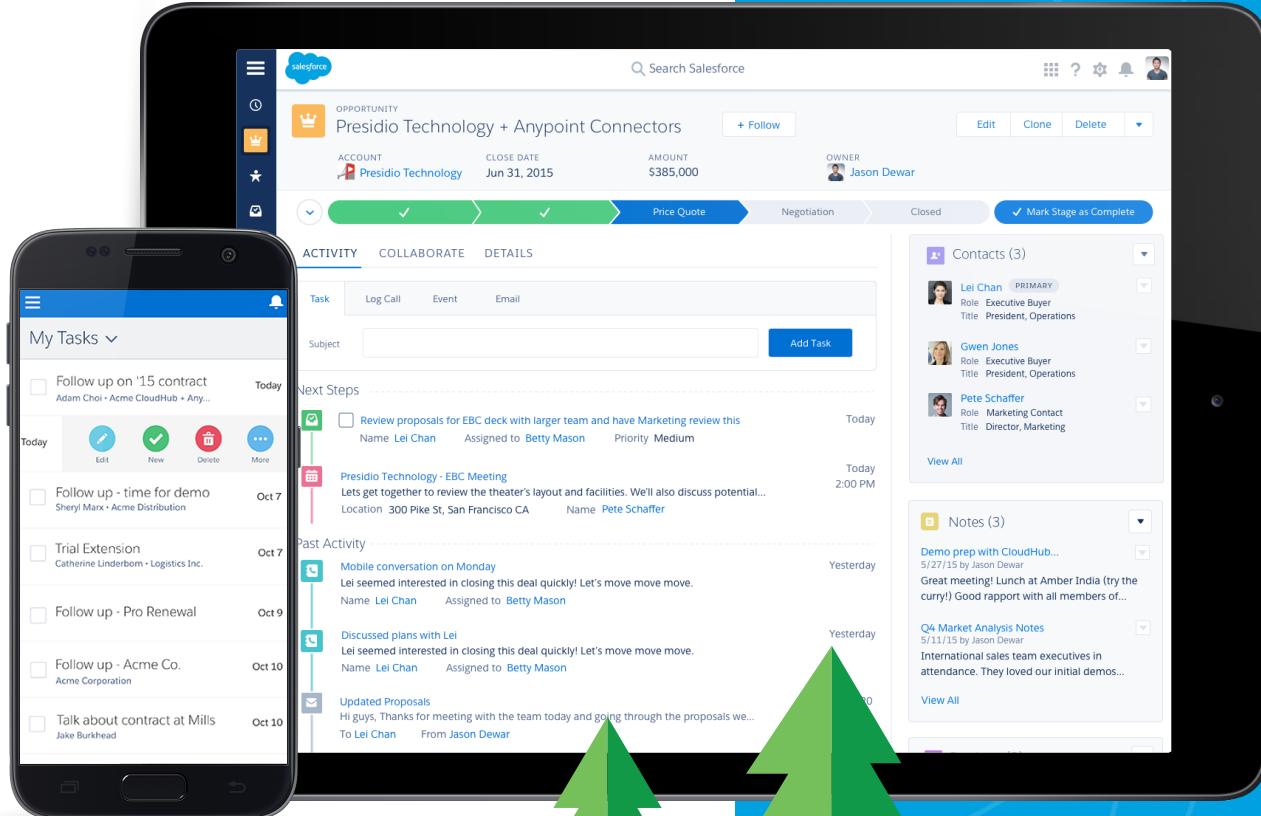
# Vertical Split Layout

Subtitle placeholder

Lore ipsum dolor sit amet,  
consectetur

Cras egestas mauris ut  
faucibus cursus

Pellentesque et risus ac turpis  
maximus



# Photo Content Layout

Subtitle placeholder

  Lorem ipsum dolor sit amet, consectetur

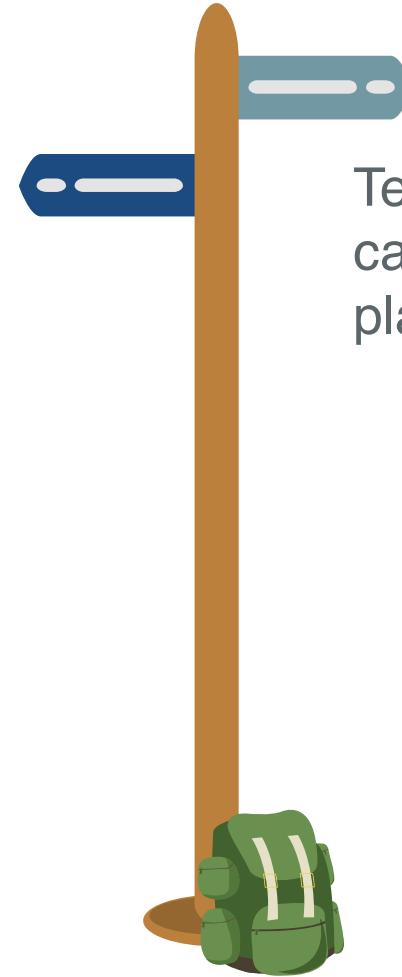
  Cras egestas mauris ut faucibus cursus

  Pellentesque et risus ac turpis maximus



# Third Split Sign Layout

Subtitle placeholder

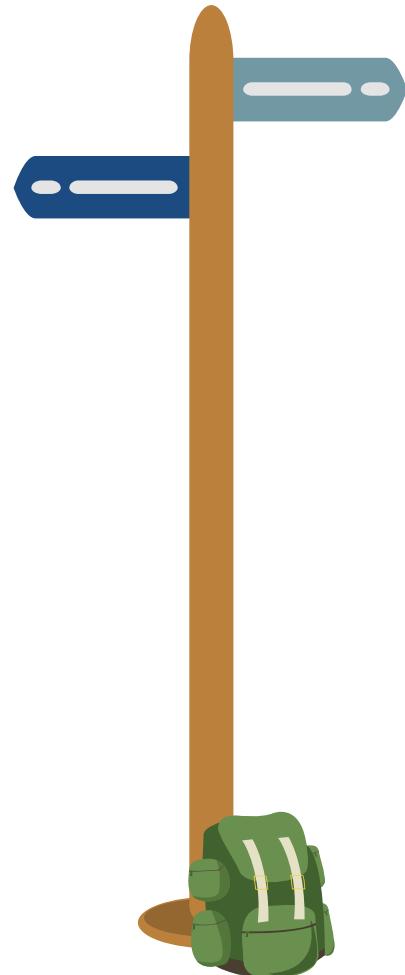


Text, images, charts, tables can be put in this placeholder.

# Third Split Sign Layout 2

Subtitle placeholder

Text, images, charts, tables  
can be put in this  
placeholder.



# Third Split Layout

Subtitle placeholder

Text, images, charts, tables can be put in this placeholder.



# Third Split Layout

Subtitle placeholder

Text, images, charts, tables  
can be put in this  
placeholder.



# Third Split Layout 2 - Example

Subtitle placeholder

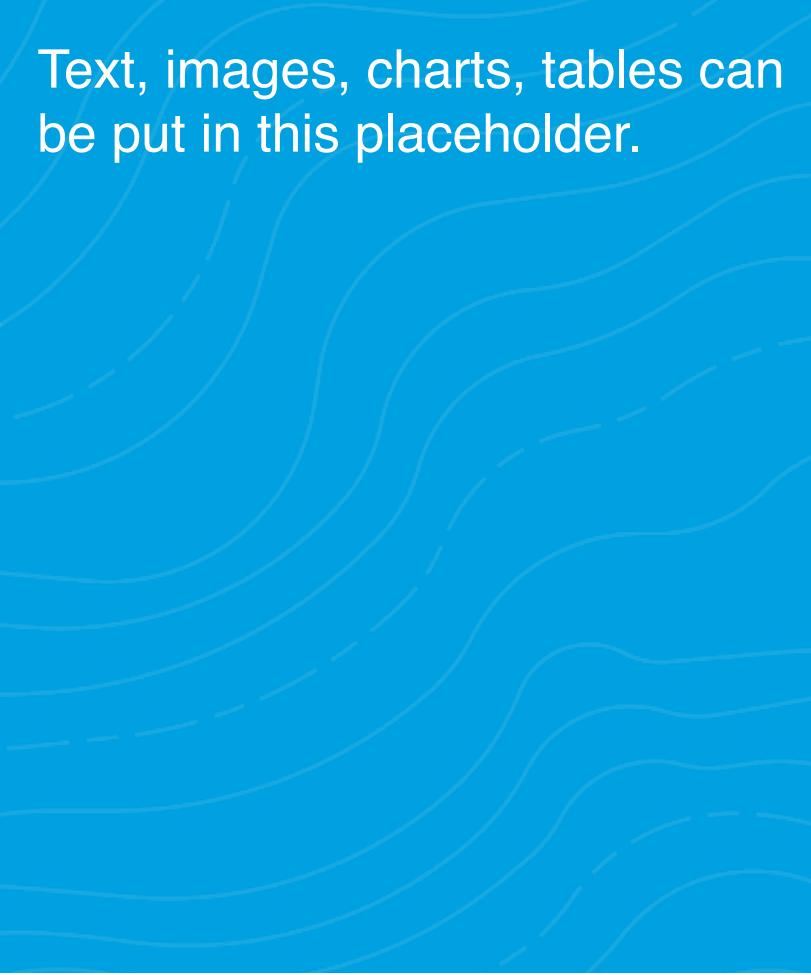
Text, images, charts, tables can  
be put in this placeholder.

AM

# Third Split 3 Blue Layout

Subtitle placeholder

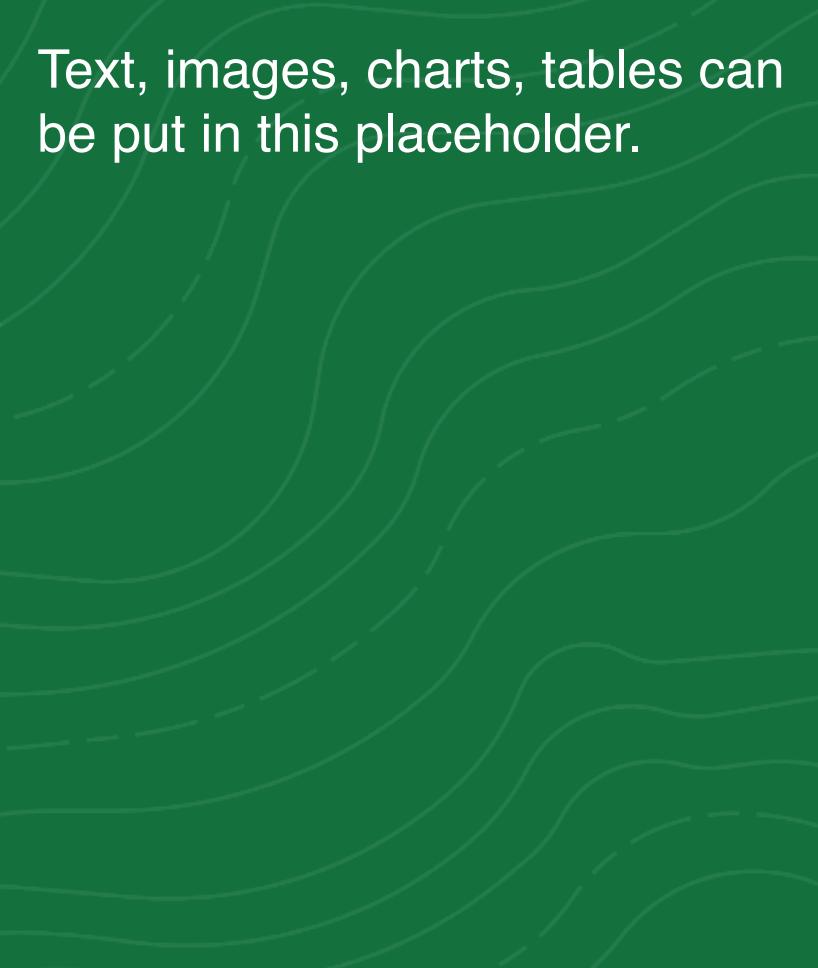
Text, images, charts, tables can be put in this placeholder.



Text, images, charts, tables can be put in this placeholder.

# Third Split 3 Trees Color Layout

Subtitle placeholder



Text, images, charts, tables can be put in this placeholder.

Text, images, charts, tables can be put in this placeholder.

# Basic Dark Layout

## Subtitle placeholder

This slide is made for easy layout of text, charts, tables, images, and other media

First level text is set at 20 point Salesforce Sans

- Second line bullets are 18 point Salesforce Sans
  - Third level text is set at 16 point Salesforce Sans
  - Limit the number of bullets on a slide
    - Fourth level text

Fifth level text for text sourcing

Example of subtly highlighted text

Example of boldly highlighted text



# Segue/Divider

Subtitle placeholder

# Segue/Divider Gradient

Subtitle placeholder

16

AM

AM



# Segue/Divider Simple

Subtitle placeholder

# Speaker slide

Title, company placeholder

PLACE COMPANY LOGO HERE

# Stage Content Layout With Mountains - Low

Use the stage for highlighting devices



# Stage Content Layout With Mountains - Example

Use the stage for highlighting devices, text primarily in white



# Stage Content Layout With Mountains - High

Use the stage for highlighting devices, text primarily in white



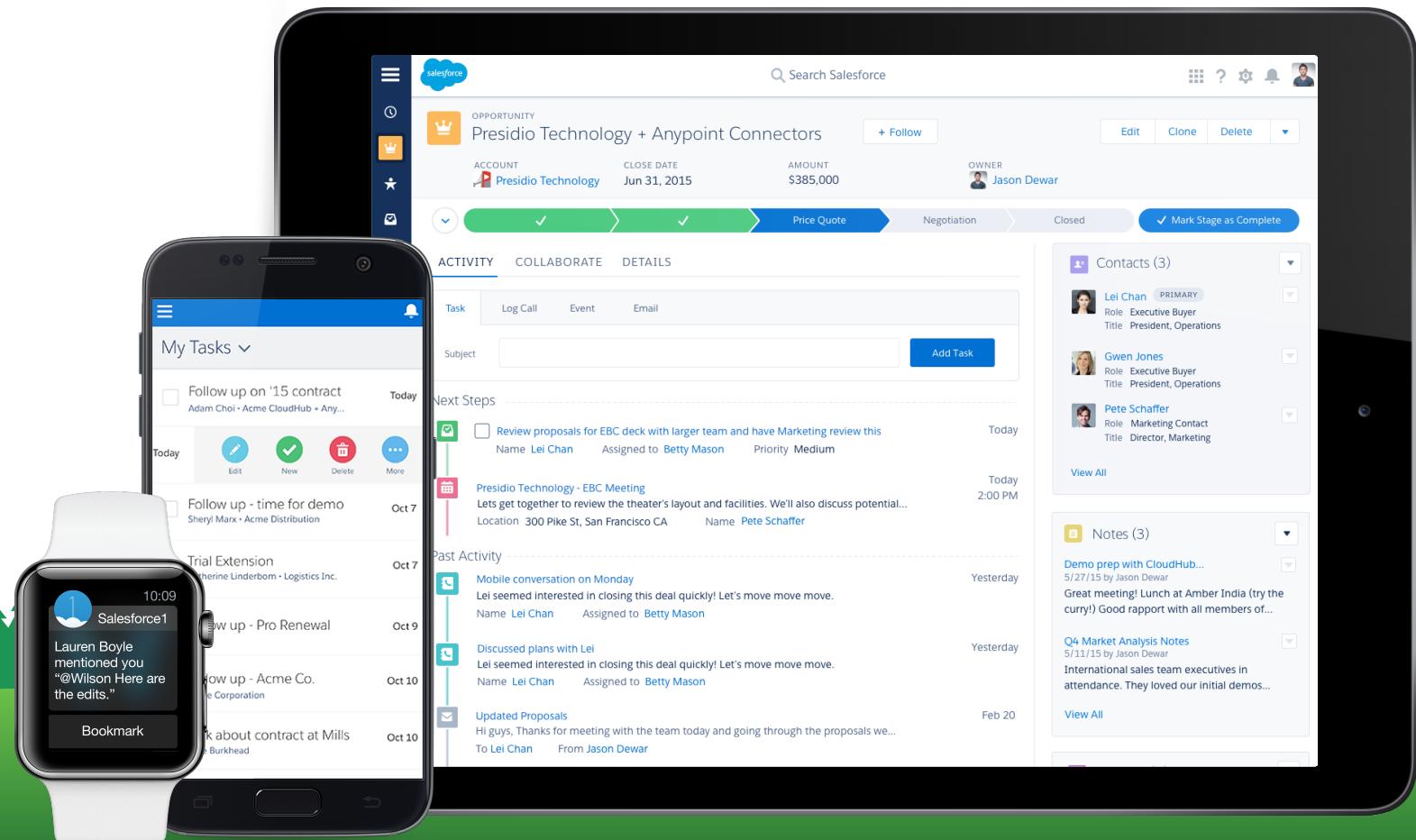
# Stage Content Layout with Plains - Low

Use the stage for highlighting devices, text primarily in white space



# Stage Content Layout with Plains – Low –Example

Use the stage for highlighting devices, text primarily in white space

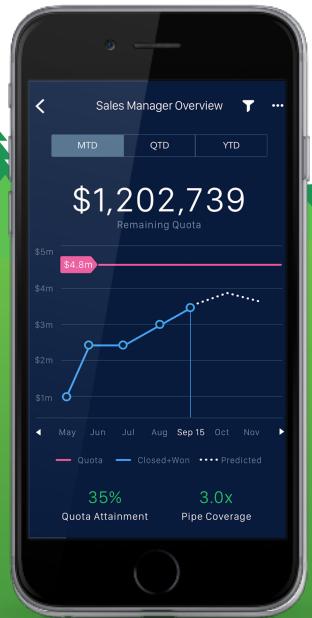


# Stage Content Layout with Plains - High

Use the stage for highlighting devices, text primarily in green space



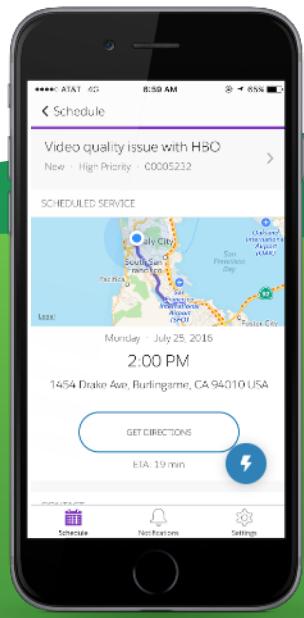
# The World's Smartest CRM



## Sales Cloud Einstein

Guide sales leaders

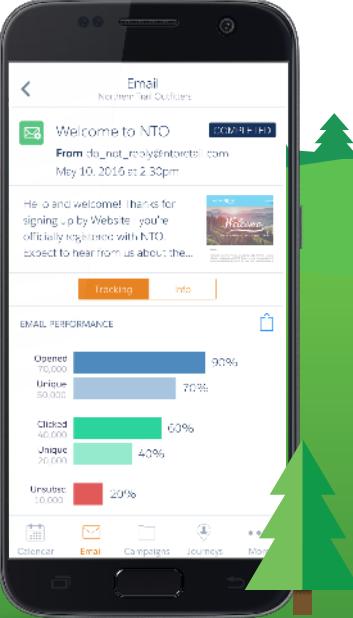
- Predictive Lead Scoring
- Opportunity Insights
- Inbox Closest Connections
- Recommend Next Best Steps
- Predictive Forecasting
- Predictive Sales Wave
- Recommended Experts, Files & Groups



## Service Cloud Einstein

Assist service agents

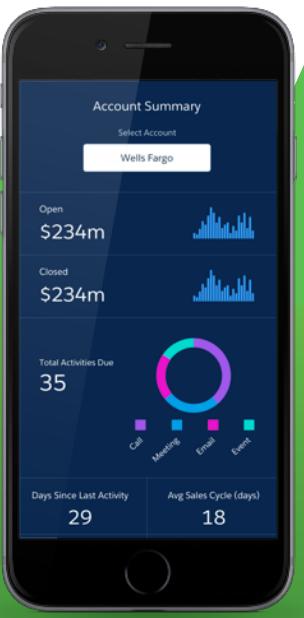
- Smart Classification
- Intelligent Routing
- Predictive Response
- Predictive Service Wave
- Automatic Community Case Escalation
- Recommended Experts & Articles



## Marketing Cloud Einstein

Predict marketing journeys

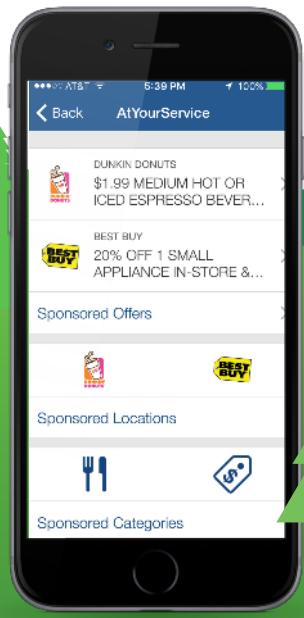
- Predictive Scoring
- Predictive Audiences
- Predictive Recommendations
- Send-Time Optimization
- Wave for B2B Marketing
- Communities Recommendations



## Analytics Cloud Einstein

Discover smart insights

- Smart Data Prep
- Smart Data Discovery
- Autonomous Analytics
- Automated Narratives



## App Cloud Einstein

Build intelligent apps

- Event Objects
- Custom Fields & Objects
- Apache Kafka on Heroku
- Apache PredictionIO on Heroku



“Lorem ipsum dolor sit amet, consectetur  
adipiscing elit.  
Aliquam ipsum velit, mattis sed libero  
vel, imperdiet feugiat lectus.”

- Author Name

**“Lorem ipsum dolor sit amet,  
consectetur adipiscing elit.  
Aliquam ipsum velit, mattis sed  
libero vel, imperdiet feugiat lectus.”**

- Author Name

# Thank You





# 2. Sample Slides

Custom made product and customer slides

# New Empowerment Model

Anyone can be a Customer Trailblazer

You can...

- Transform** your company
- Innovate** with Salesforce
- Grow** your career
- Be your best**

\$20K

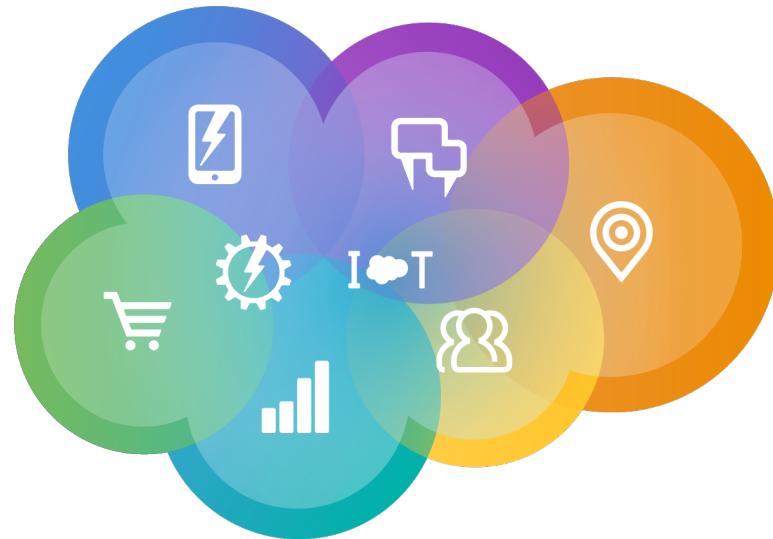
salary premium with  
Salesforce Certification



Tami Lau  
CRM Developer

# Be a Customer Trailblazer

Connect to your customers in a whole new way



CUSTOMER SUCCESS PLATFORM

8 industry leading apps, 1 platform



Tami Lau  
CRM Developer

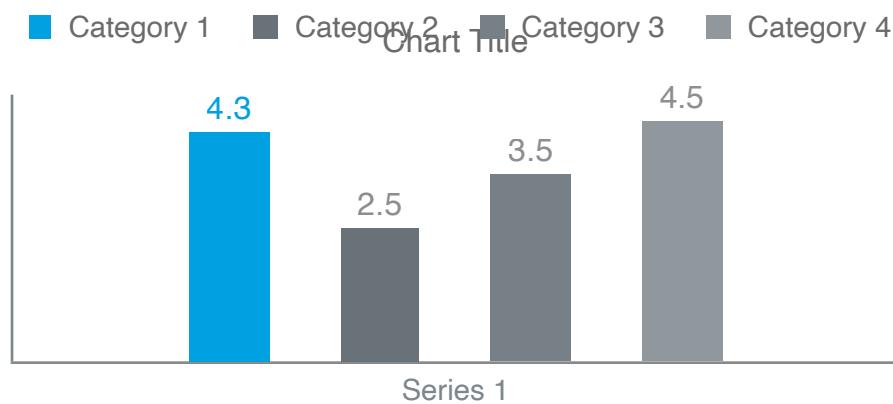
# 3. Chart & Data Templates

Salesforce 2016

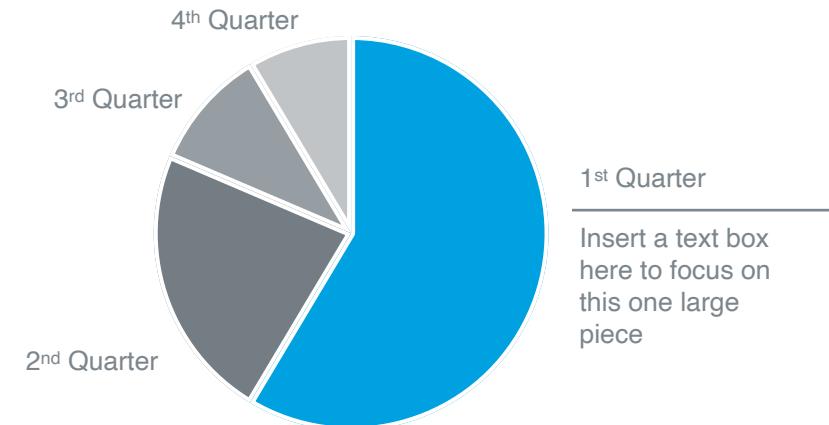
# Charts and Graphs Font Treatment

Change all text within charts to the Salesforce Sans font.

It is recommended that you also change number values to Salesforce Sans, however you may keep Numerical values as associated with bars as Arial for ease of use.

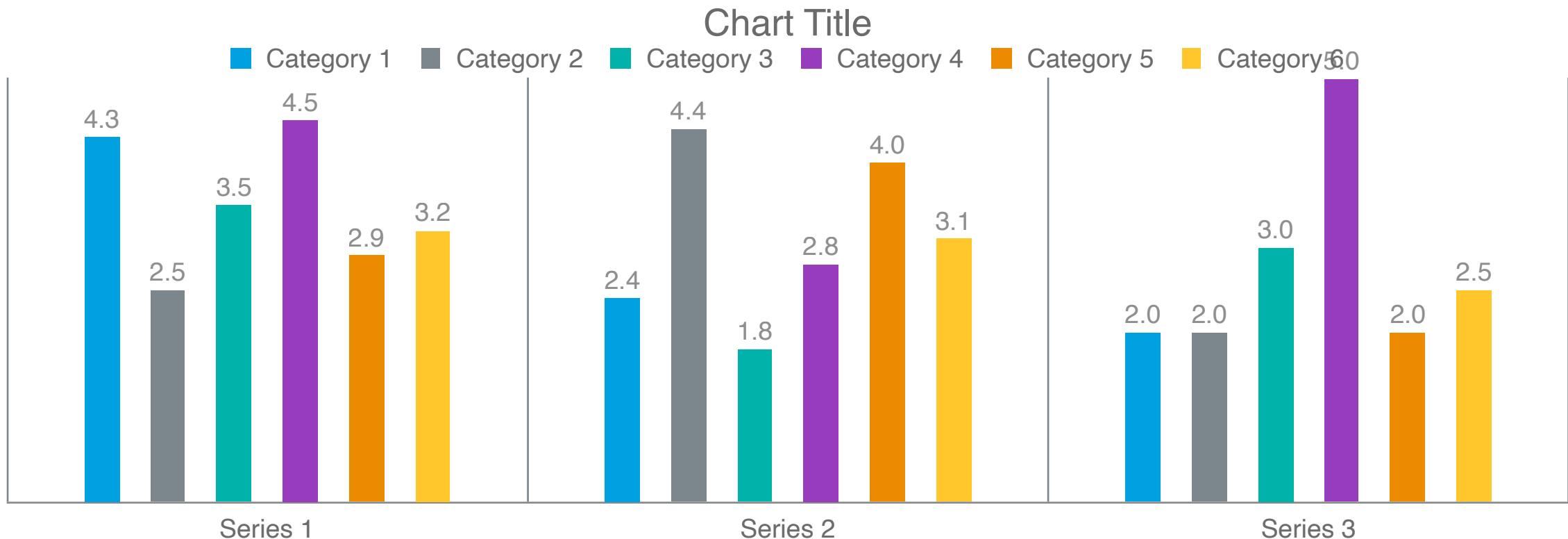


If you are creating a chart with number values that are not built into the template change them Salesforce Sans



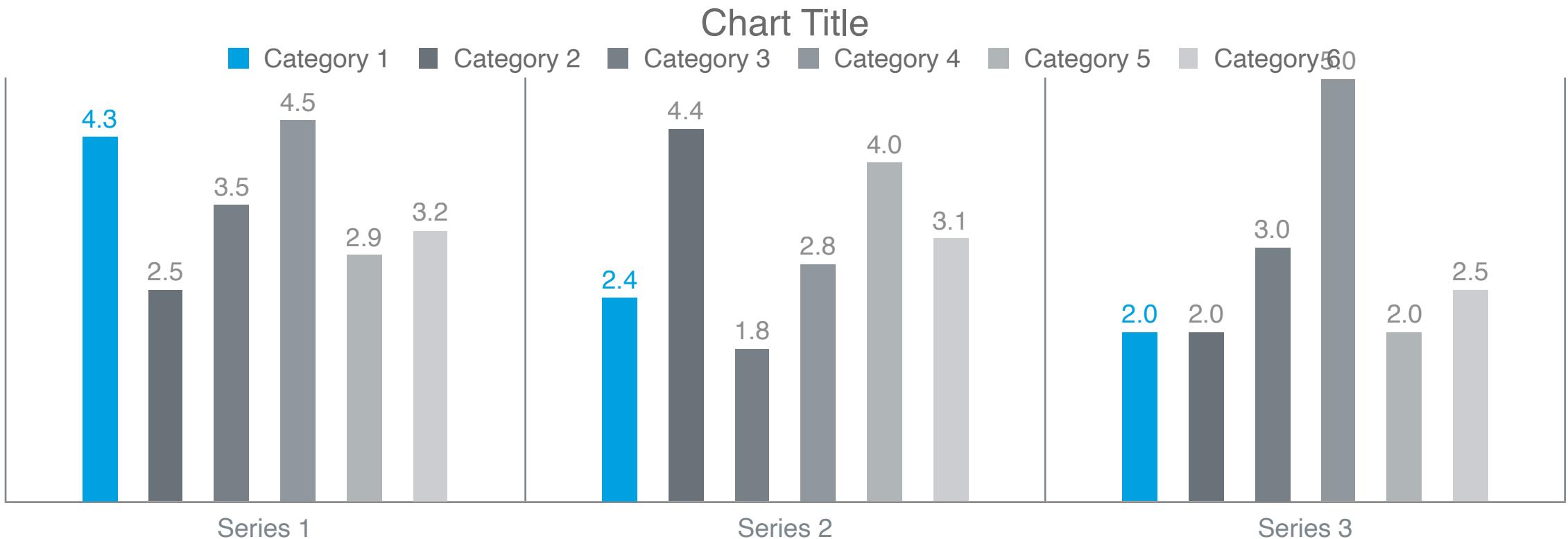
# Example of a Bar Chart (Custom)

Chart title or slide subtitle



# Example of a Bar Chart (Custom)

Chart title or slide subtitle



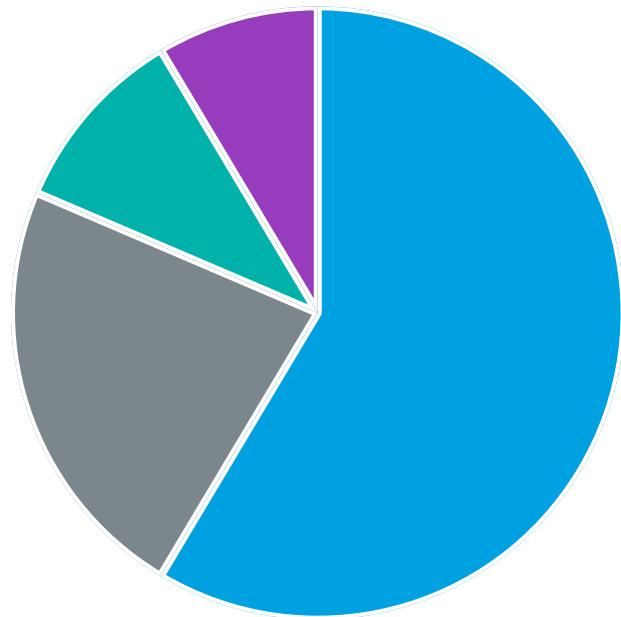
Source: placeholder



# Example of a Pie Chart (Default and Custom)

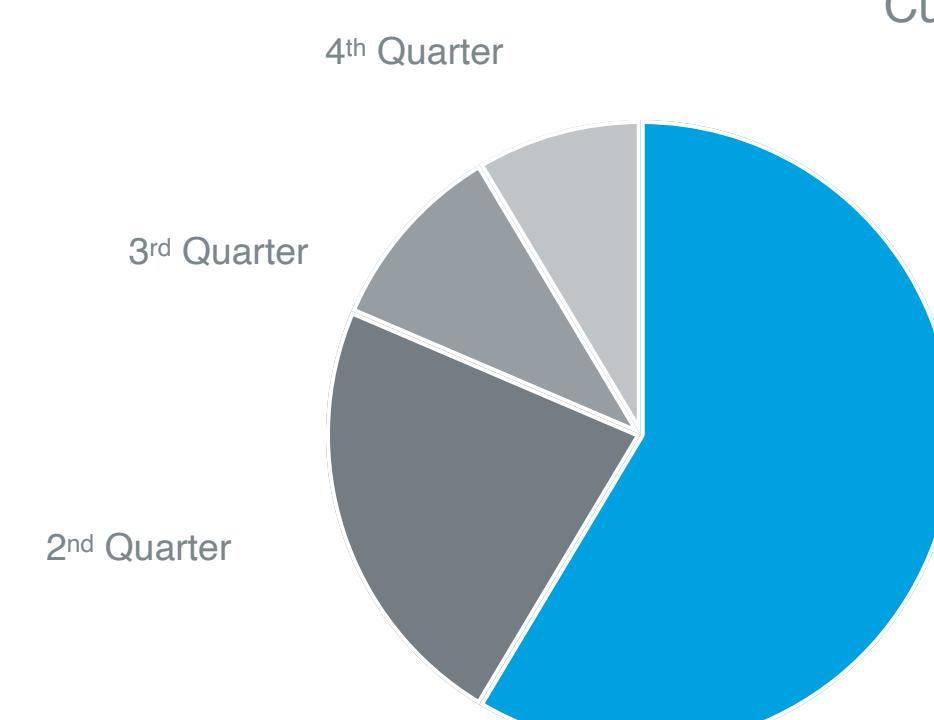
Chart title or slide subtitle

Default



- 1st Qtr
- 2nd Qtr
- 3rd Qtr
- 4th Qtr

Custom

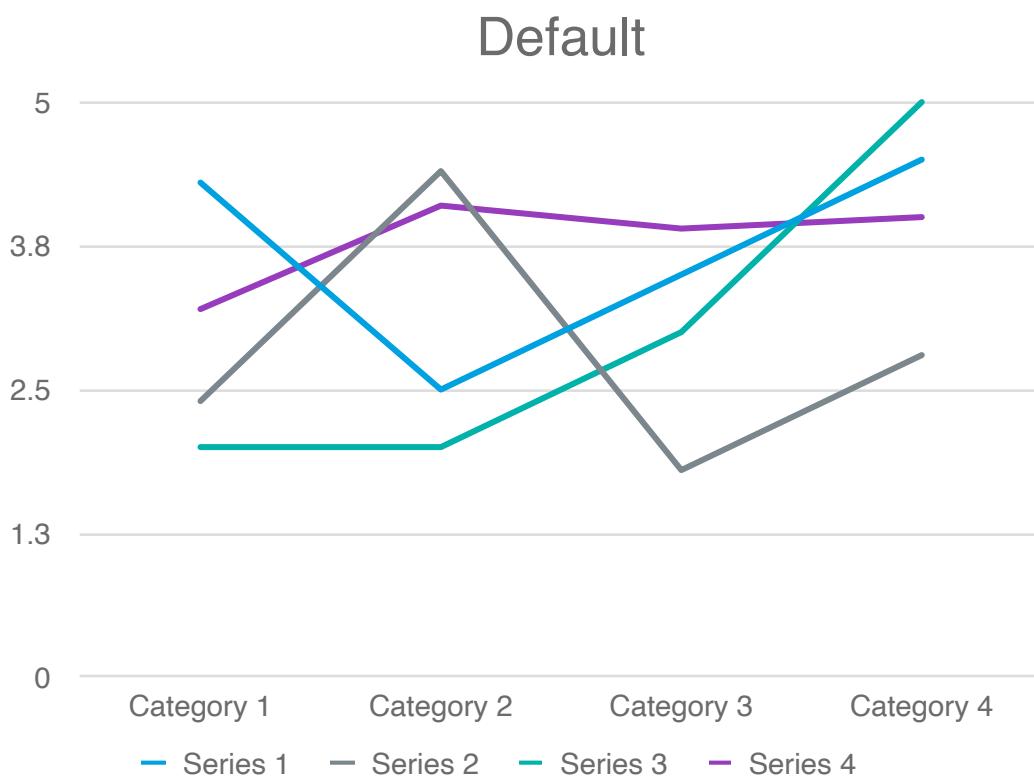


1<sup>st</sup> Quarter

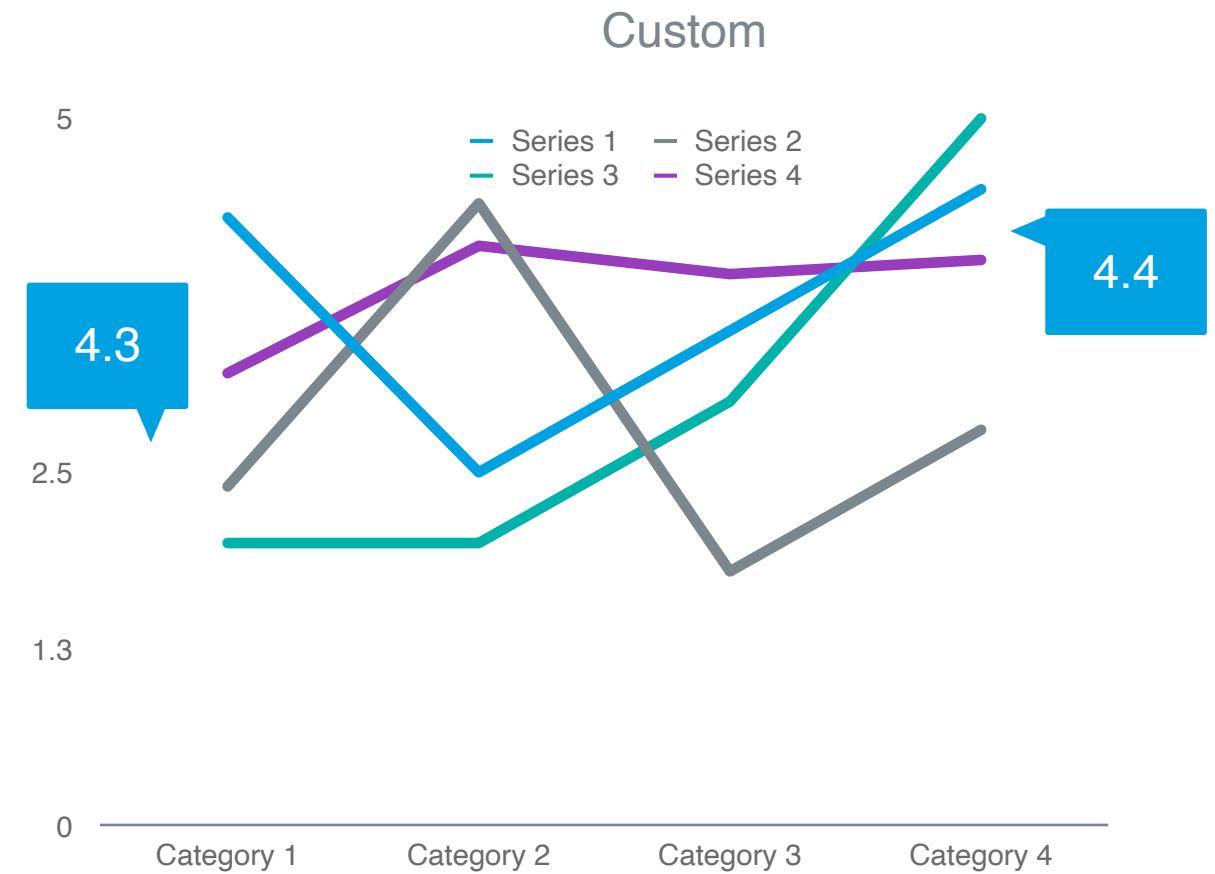
Insert a text box here to focus on this one large piece

# Example of a Line Chart (Default & Custom)

Chart title or slide subtitle

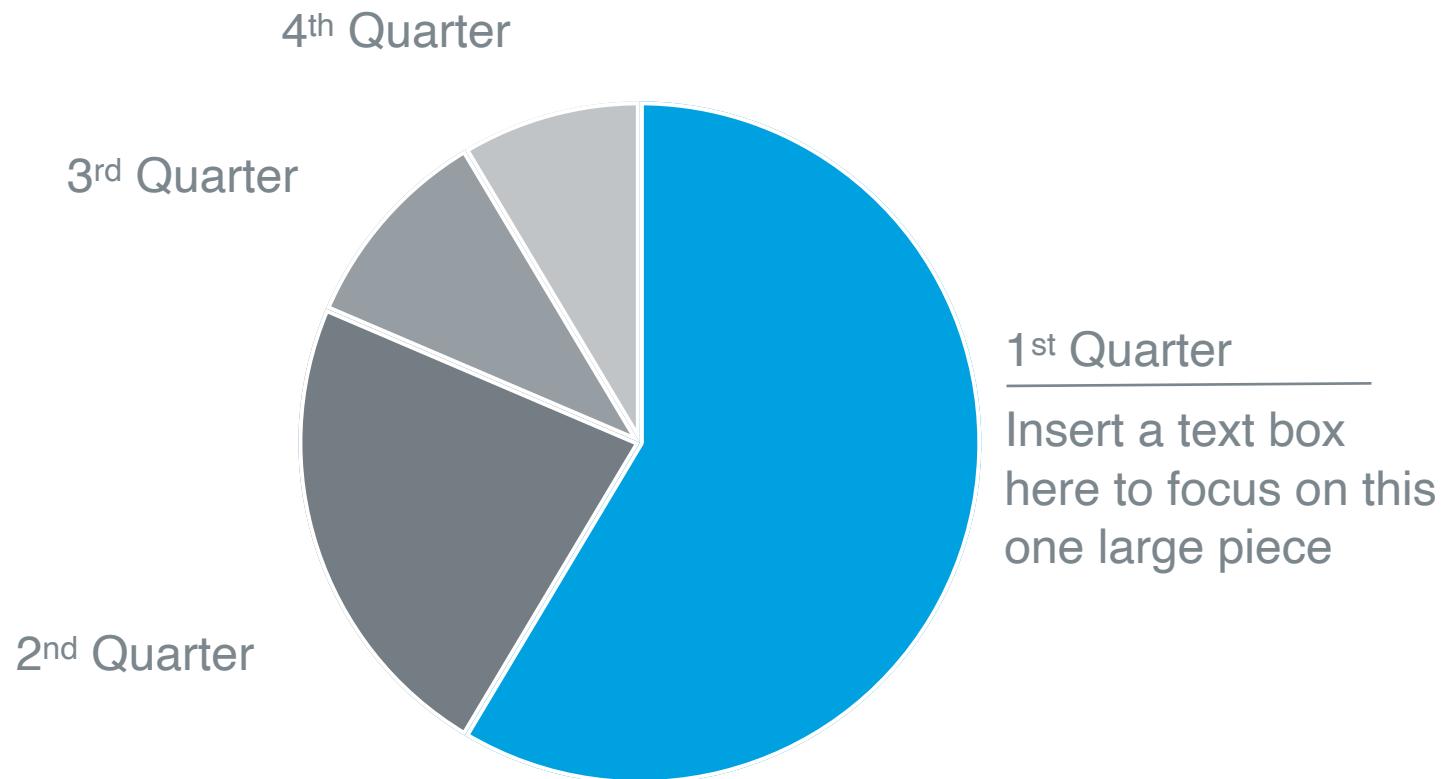


Source: placeholder



# Example of a Chart with Supporting Text

Subtitle placeholder

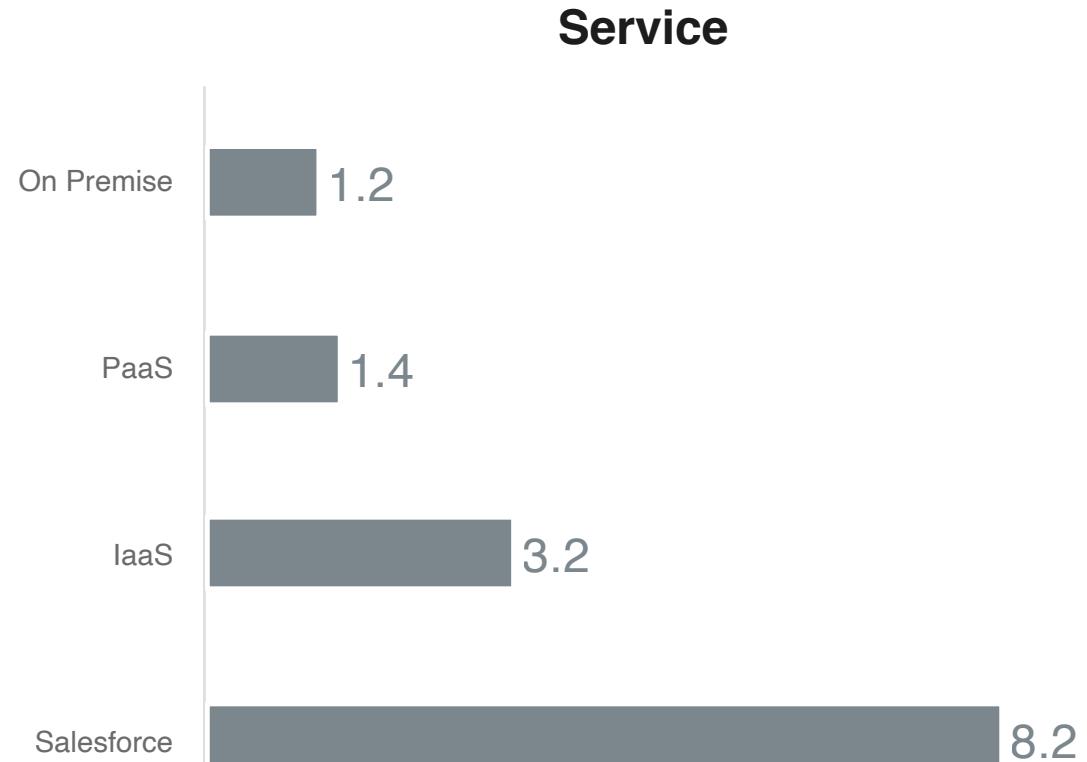


Lorem ipsum dolor sit amet,  
consectetur adipiscing elit..

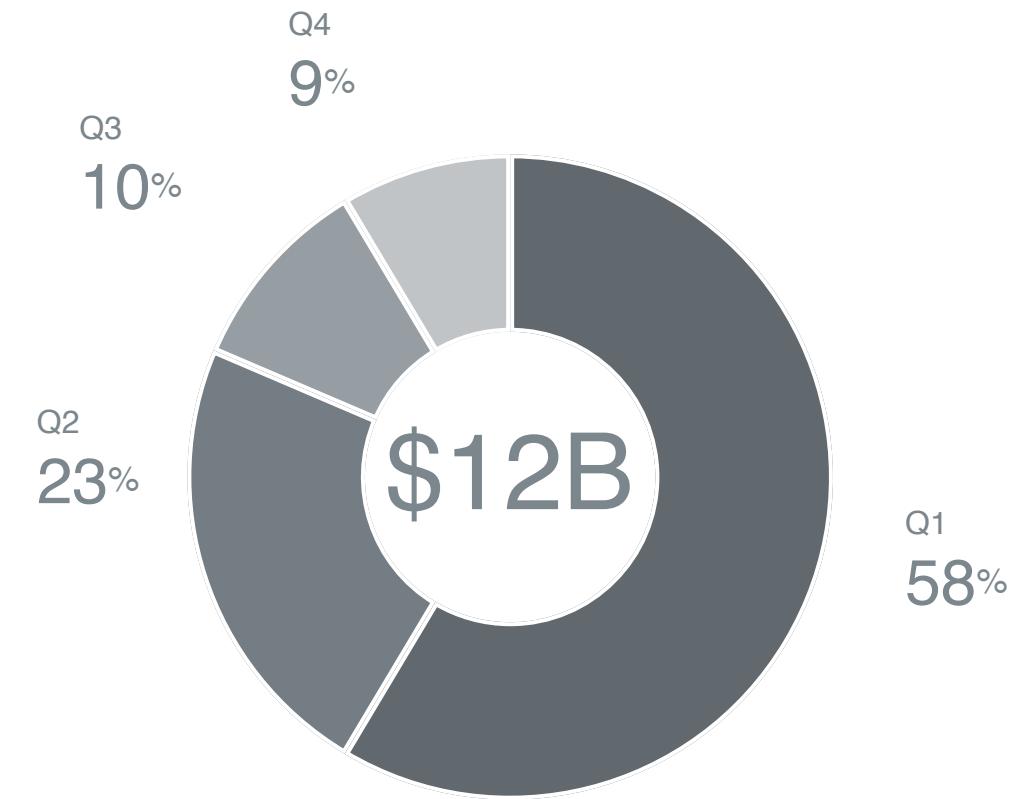
- Key takeaway one
- Key takeaway one
- Key takeaway one

# Example of Charts Using the 2 Column Layout

Subtitle placeholder



Source: placeholder



Source: placeholder



# Example of a Table

Table title or slide subtitle

	Column title	Column title	Column title
Row title	\$00.00	\$00.00	\$00.00
Row title	\$00.00	\$00.00	\$00.00
Row title	\$00.00	\$00.00	\$00.00
Row title	\$00.00	\$00.00	\$00.00
Row title	\$00.00	\$00.00	\$00.00

Source: placeholder



# Example of a Table

Table title or slide subtitle

	Column title	Column title	Column title
Row title	<p>Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p> <p>Suspendisse congue turpis maximus dignissim posuere.</p> <p>Quisque sit amet justo ultrices, finibus massa eu, vehicula dui.</p>	<p>Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p> <p>Suspendisse congue turpis maximus dignissim posuere.</p> <p>Quisque sit amet justo ultrices, finibus massa eu, vehicula dui.</p>	<p>Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p> <p>Suspendisse congue turpis maximus dignissim posuere.</p> <p>Quisque sit amet justo ultrices, finibus massa eu, vehicula dui.</p>
Row title	<p>Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p> <p>Suspendisse congue turpis maximus dignissim posuere.</p> <p>Quisque sit amet justo ultrices, finibus massa eu, vehicula dui.</p>	<p>Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p> <p>Suspendisse congue turpis maximus dignissim posuere.</p> <p>Quisque sit amet justo ultrices, finibus massa eu, vehicula dui.</p>	<p>Lorem ipsum dolor sit amet, consectetur adipiscing elit.</p> <p>Suspendisse congue turpis maximus dignissim posuere.</p> <p>Quisque sit amet justo ultrices, finibus massa eu, vehicula dui.</p>



# Example of a Table

## Table title or slide subtitle

Intro heading text  <b>Key takeaway text here, table title text here</b>  Some additional detail text. If this table is presented in large room, do not use this chart, because it will be too small to read.  If this is going to be presented online or other personal presentation space, this text is as small as it should go.
---

	Column title, can be multi-line	Column title, can be multi-line	Column title, can be multi-line
Row title	<p>Lore ipsum dolor sit amet, consectetur adipiscing elit.</p> <p>Suspendisse congue turpis maximus dignissim posuere.</p> <p>Quisque sit amet justo ultrices, finibus massa eu, vehicula dui.</p>	<p>Lore ipsum dolor sit amet, consectetur adipiscing elit.</p> <p>Suspendisse congue turpis maximus dignissim posuere.</p> <p>Quisque sit amet justo ultrices, finibus massa eu, vehicula dui.</p>	<p>Lore ipsum dolor sit amet, consectetur adipiscing elit.</p> <p>Suspendisse congue turpis maximus dignissim posuere.</p> <p>Quisque sit amet justo ultrices, finibus massa eu, vehicula dui.</p>
Row title	<p>Lore ipsum dolor sit amet, consectetur adipiscing elit.</p> <p>Suspendisse congue turpis maximus dignissim posuere.</p> <p>Quisque sit amet justo ultrices, finibus massa eu, vehicula dui.</p>	<p>Lore ipsum dolor sit amet, consectetur adipiscing elit.</p> <p>Suspendisse congue turpis maximus dignissim posuere.</p> <p>Quisque sit amet justo ultrices, finibus massa eu, vehicula dui.</p>	<p>Lore ipsum dolor sit amet, consectetur adipiscing elit.</p> <p>Suspendisse congue turpis maximus dignissim posuere.</p> <p>Quisque sit amet justo ultrices, finibus massa eu, vehicula dui.</p>

# Example of a Table

Table title or slide subtitle

	Column title	Column title	Column title
Row title	\$00.00	\$00.00	\$00.00
Row title	\$00.00	\$00.00	\$00.00
Row title	\$00.00	\$00.00	\$00.00
Row title	\$00.00	\$00.00	\$00.00
Row title	\$00.00	\$00.00	\$00.00

# 4. Graphic Assets Tool Kit

Salesforce 2016

# Forward-Looking Statements

## Statement under the Private Securities Litigation Reform Act of 1995:

This presentation may contain forward-looking statements that involve risks, uncertainties, and assumptions. If any such uncertainties materialize or if any of the assumptions proves incorrect, the results of salesforce.com, inc. could differ materially from the results expressed or implied by the forward-looking statements we make. All statements other than statements of historical fact could be deemed forward-looking, including any projections of product or service availability, subscriber growth, earnings, revenues, or other financial items and any statements regarding strategies or plans of management for future operations, statements of belief, any statements concerning new, planned, or upgraded services or technology developments and customer contracts or use of our services.

The risks and uncertainties referred to above include – but are not limited to – risks associated with developing and delivering new functionality for our service, new products and services, our new business model, our past operating losses, possible fluctuations in our operating results and rate of growth, interruptions or delays in our Web hosting, breach of our security measures, the outcome of any litigation, risks associated with completed and any possible mergers and acquisitions, the immature market in which we operate, our relatively limited operating history, our ability to expand, retain, and motivate our employees and manage our growth, new releases of our service and successful customer deployment, our limited history reselling non-salesforce.com products, and utilization and selling to larger enterprise customers. Further information on potential factors that could affect the financial results of salesforce.com, inc. is included in our annual report on Form 10-K for the most recent fiscal year and in our quarterly report on Form 10-Q for the most recent fiscal quarter. These documents and others containing important disclosures are available on the SEC Filings section of the Investor Information section of our Web site.

Any unreleased services or features referenced in this or other presentations, press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make the purchase decisions based upon features that are currently available. Salesforce.com, inc. assumes no obligation and does not intend to update these forward-looking statements.



# Use This Layout For Aligning or Realigning Drawing Guides

Use this layout for realigning basic drawing guides or reference them as needed



## What are Drawing Guides?

This lines that appear on all pages in the same spot, but don't show up when you print or view deck in Show mode.

Think of them as internal margins for the proper alignment and consistent placement of content. Object will snap to them and they are also perfect for cropping an image to.

This template has pre-made guides that delineate where your workspace is.

## How to Turn Guides On and Off

**Windows:** ALT + F9 or Right click in blue area off workspace  
>Grids and Guides>Display Drawing Guides on Screen

**Mac 2011:** Control + Option + Command + G or  
View>Guides>Static Guides

**MAC 2008:** Command + G or View>Guides>Static Guides

The left and right top and bottom corners only area you should work within on your slides.

## Realigning Guides

Guides can easily be bumped and moved accidentally. This slide layout show you how to reset your guides.

**NOTE:** When working on any older deck, be sure to check and ensure that the guides in your deck are set.

**1.Turn on your guides**

**2.Insert a new slide the using the Guide Layout slide option.**

**3.Do your guides align with the orange lines in the new slide?** If yes, your guides are set, if not, proceed then realign each of the lines to line up with the lines shown on this page.

**4.Once guides are reset, delete the Guide Layout Slide**

## How to Create a New Guide Line

Select a guide, hold down the Option key and drag. This will duplicate the line



# Theme Colors

Colors Built into the template



R 255  
G 255  
B 255



R 38  
G 38  
B 38



R 208  
G 217  
B 222



R 25  
G 50  
B 92



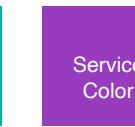
R 0  
G 161  
B 224



R 124  
G 134  
B 141



R 0  
G 178  
B 169



R 150  
G 60  
B 189



R 237  
G 139  
B 0



R 255  
G 199  
B 44

## Corporate Colors

## Chart Colors

This is the order that charts automatically follow



# Color Usage

## Typography and Charts

First Level text

Second level text

Third level text

This is a sentence with **bold** highlight

This is a sentence with **subtle** highlight

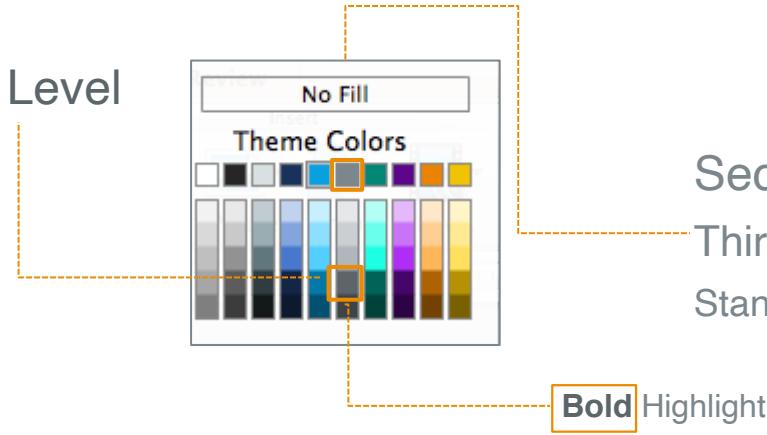
First Level

Second level

Third level

Standard text

**Bold** Highlight



# Salesforce Brand Color Family

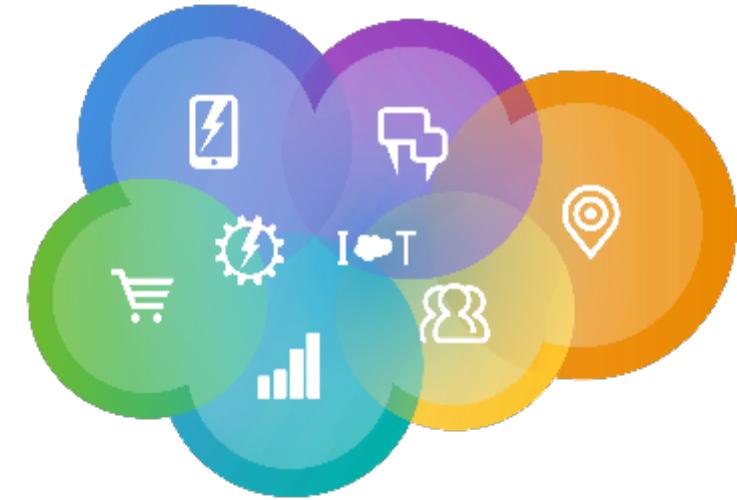
For colors not already in the PowerPoint palette, manually enter the RGB values

	Salesforce Blue	Salesforce Gray					
Corporate Colors	0, 161, 224	124, 134, 141					
	Sales	Service	Marketing	Community	Analytics	Platform & IOT	Commerce
Brand Extensions	65, 143, 222 146, 193, 233	150, 60, 189 167, 123, 202	237, 139, 0 241, 180, 52	255, 182, 15 255, 203, 79	0, 178, 169 100, 204, 201	0, 24, 113 0, 71, 187	108, 194, 74 161, 216, 132
						PowerPoint Background Gradient Top	PowerPoint Background Gradient Bottom
Secondary	227, 232, 235	208, 217, 222	183, 197, 204	145, 166, 178	0, 60, 77	25, 50, 92	0, 161, 224
Alternative	Dark Text (use rarely)	Signs	Signs 2	Trees	Trees 2	Light Green	
	10, 59, 97	74, 49, 23	225, 194, 118	20, 113, 62	18, 153, 72	174, 190, 137	

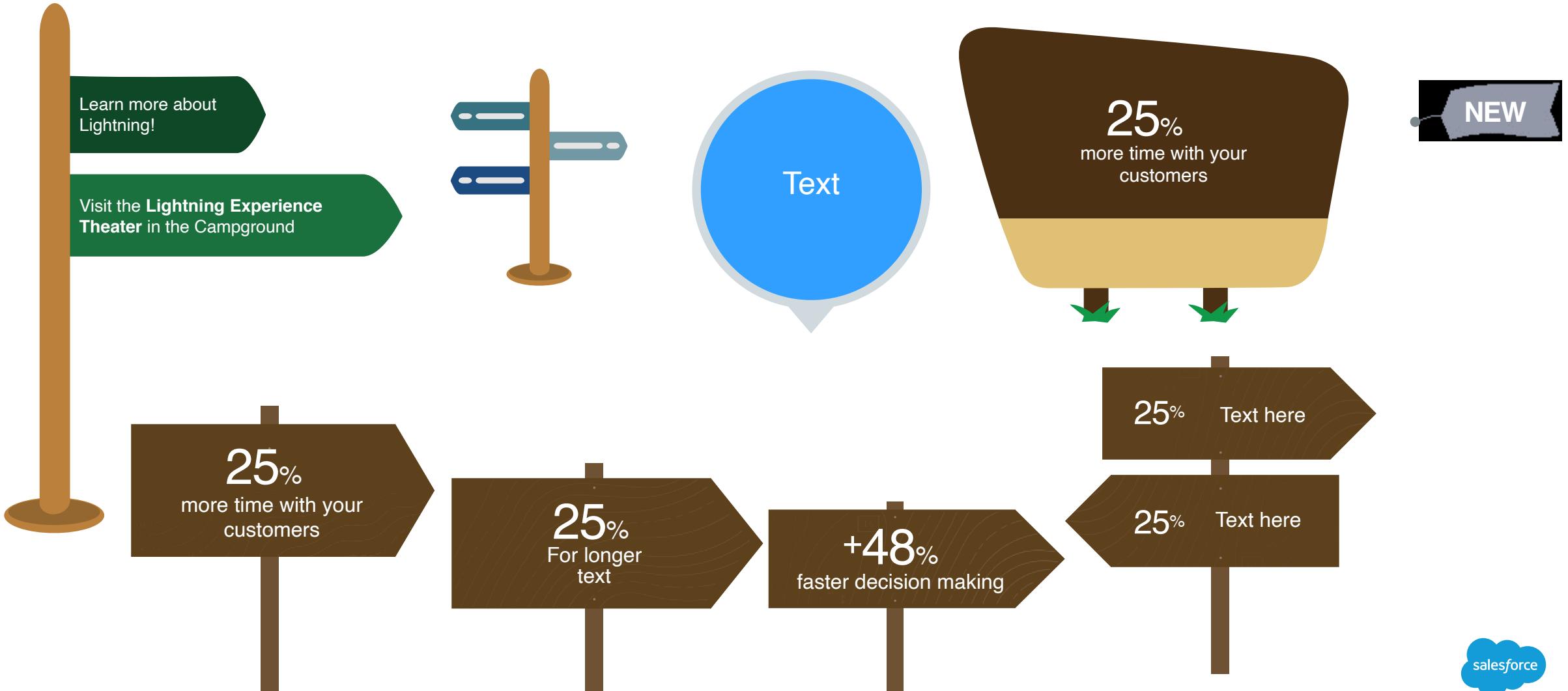


# Customer Success Platform and Wayfinders

As a navigational breadcrumb tool and Graphic

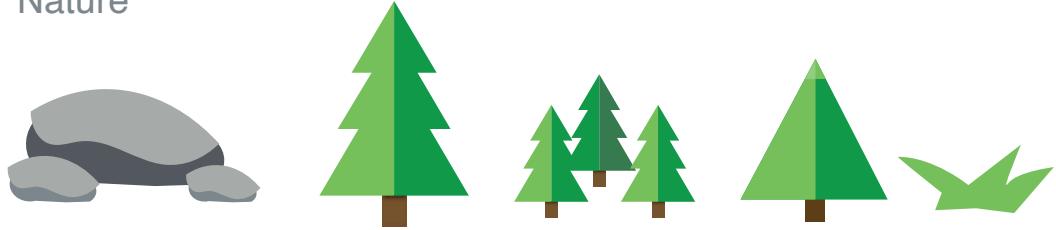


# Trailhead Flags & Signs



# Design Elements

Nature

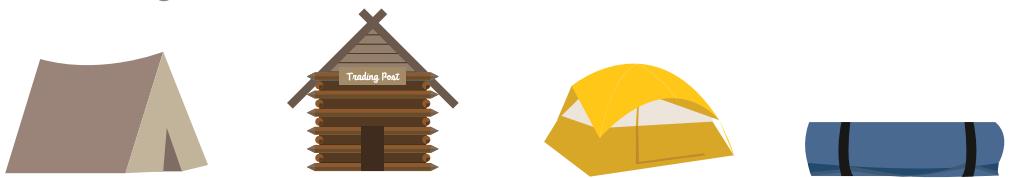


Animals

(Animals should always be smaller than the official Mascots)



Housing



Transportation



Equipment



Lighting



Shadow

(Resize and layer as needed)

# Iconography

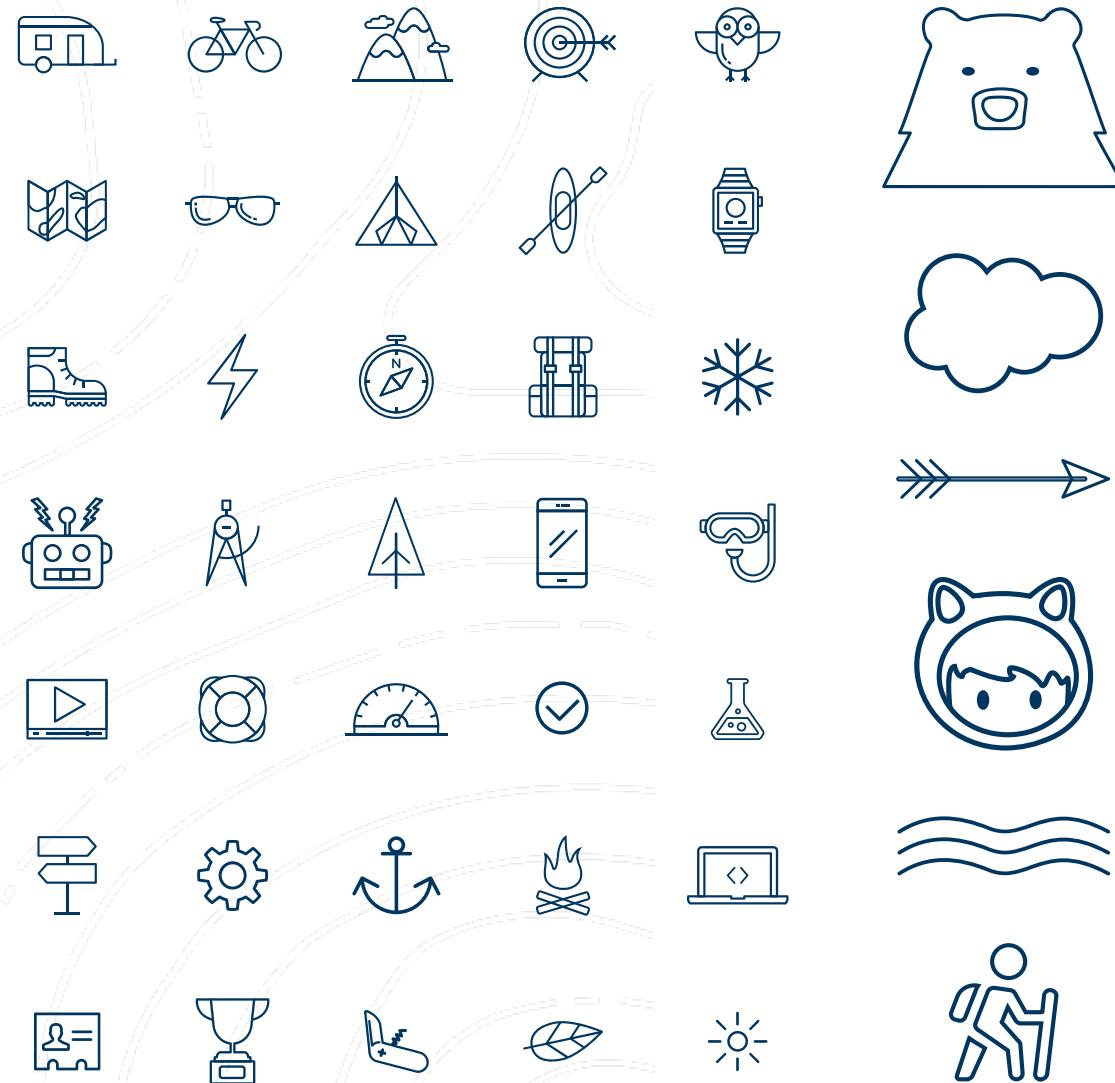
## Line Art Icons

Icons play a big part to keep things playful. The line art icons are geeky and have Trailhead's outdoor spirit.

We've begun to use more line art in our design for contrast against the flat artwork direction.

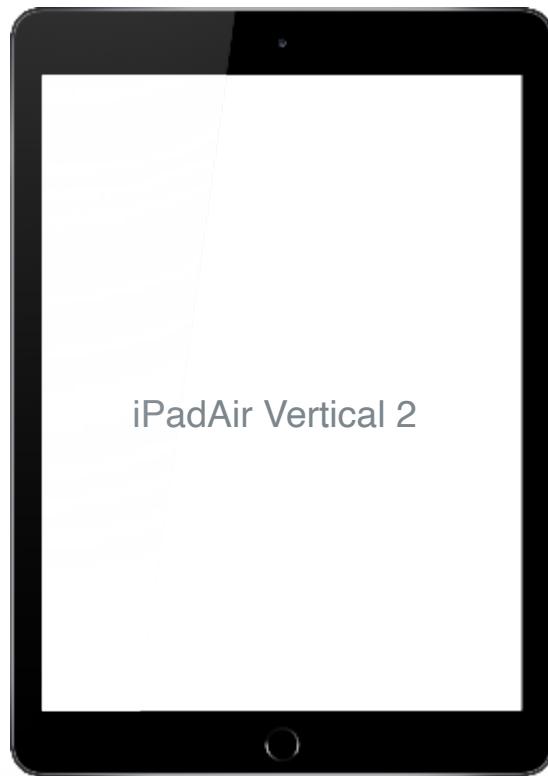
If you choose line art, suggest being consistent and using less of the cartoon style throughout your deck

AM

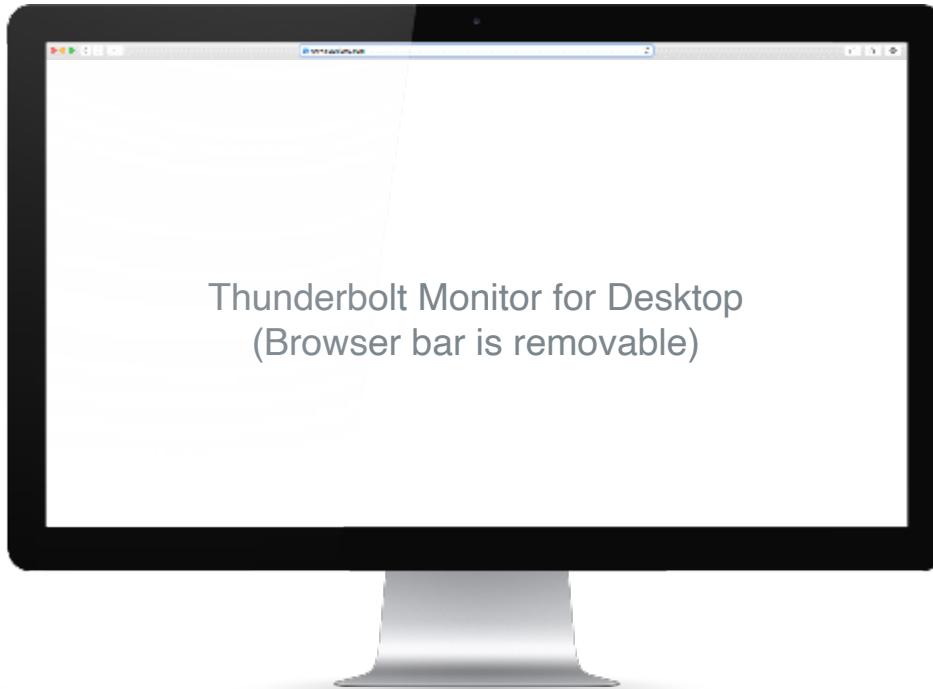
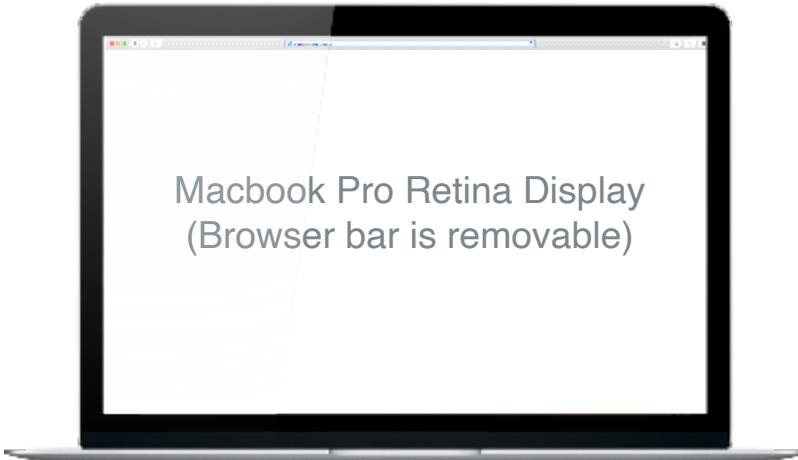


# Mobile Phones and Watches

Devices are to scale in relationship to one another, use this slide as a reference



# Computers



# 5. PowerPoint How Tos

Salesforce 2016

# Five Alternatives to Bulleted Lists

Salesforce tries to avoid using bulleted lists when possible

## 1. Paragraph Line Spacing

Motivate to get things done

Inspire by tracking goals

Score to ensure right priority

Motivate to get things done

Inspire by tracking goals

Score to ensure right priority

## 4. Paragraph Heading or Word Heading

**Motivate**  
to get things done

**Inspire**  
by tracking goals

**Score**  
to ensure right priority

## 2. Bold first word

(note wording must be carefully constructed)

**Motivate** to get things done

**Inspire** by tracking goals

**Score** to ensure right priority

## 3. Columns

(note wording must be carefully constructed)

Motivate to get  
things done

Inspire by  
tracking goals

Score to ensure  
right priority

## 5. Graphic instead of Bullet



Motivate to get things done



Inspire by tracking goals



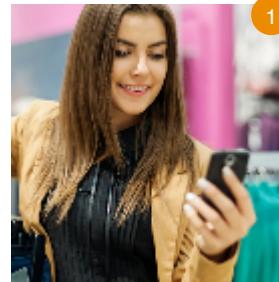
Score to ensure right priority



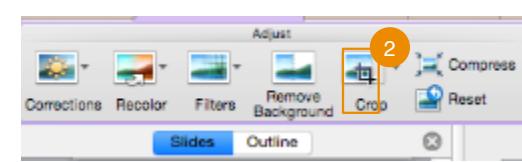
# How to Mask any Images into a Circle Shape in One Click

E.g. how to turn a square image into a circle

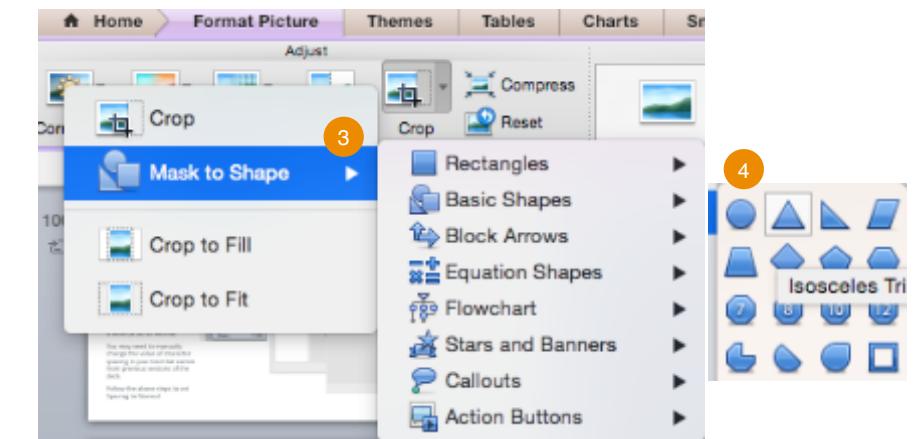
1 Click on the image



2 Select Crop



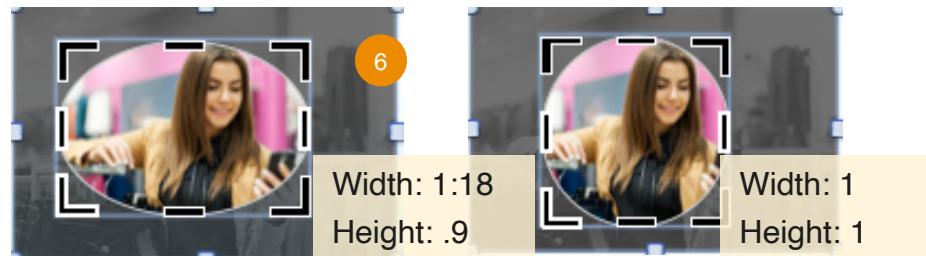
3 Select "Mask to Shape"



4 Choose your Shape (you can use any shape in the pull down menu)

5 Select circle shape

6 Use Crop tool to create a perfectly symmetrical circle. It will tell you the width and height. Make them equal

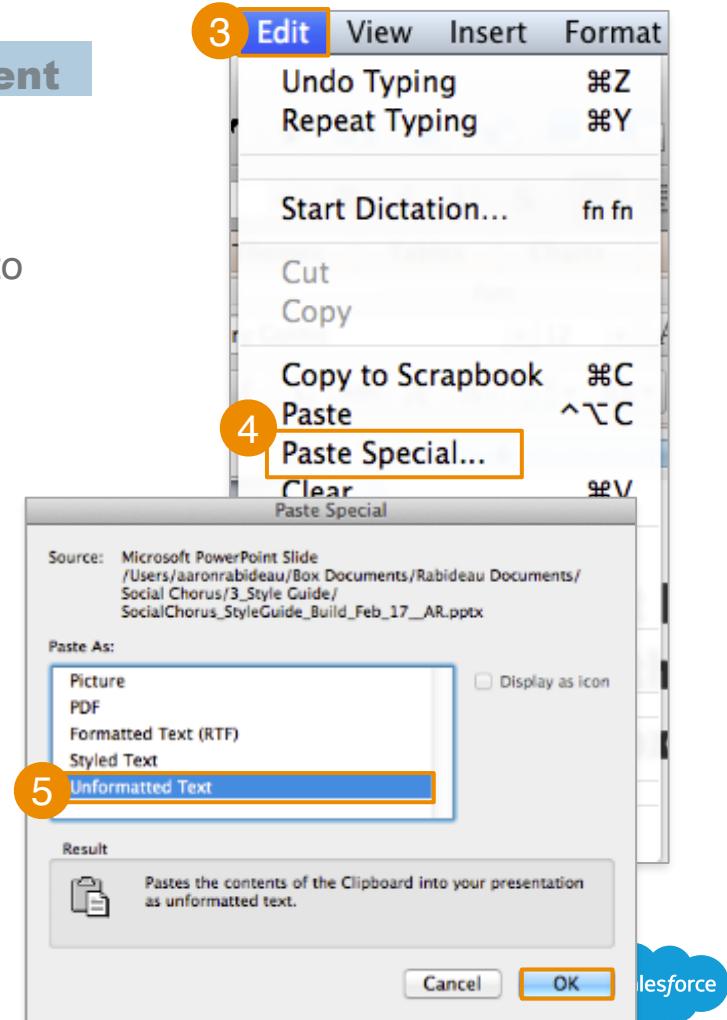


**Note:** Start with a perfect square image and it will automatically be a circle when masked to circle shape

# “Paste Special” to Retain Formatting of Current Text Box

1. Copy the text that you want to paste into another text box
2. Put your cursor into the text box you want to paste into
3. Click on the “Edit” menu and select
4. Select “Paste Special”
5. Scroll down to bottom and select “Unformatted Text”
6. This will make whatever text you paste into the box, match the original format of the box you are pasting into

- 1 You want to copy this content into another text box
- 2 • The text box you are pasting into



Mac Shortcut: Control + Command + V

# Find and Replace to Change Fonts Across Entire Deck (Mac)

This Template Uses the  
Custom Salesforce Sans Font

It is pre-installed on all Salesforce computers.

**If You Are Copying Slides from an Older Deck  
Be Sure to Change All Text to Salesforce Sans**

You can do this manually or globally by using the  
Find Replace Font Feature.

**What if You Do Not Have  
Salesforce Sans Installed on Your Computer?**

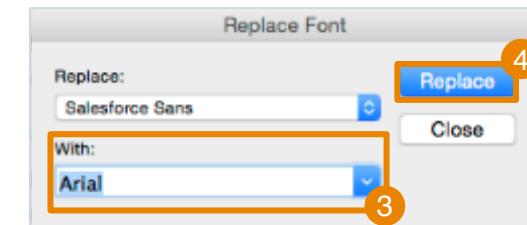
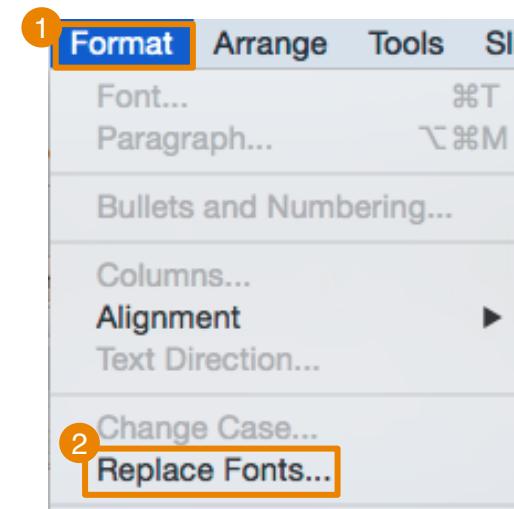
If you are working on a computer that doesn't have  
the Salesforce Sans font installed, please replace  
all instances of Salesforce Sans with Arial.

**What if You Are Sending it to Someone that  
Doesn't Have the Font Installed**

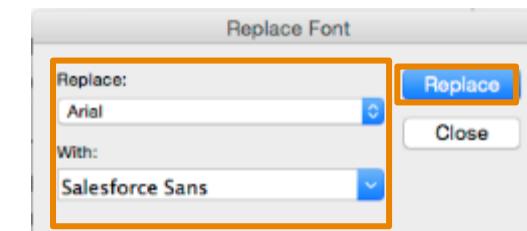
It is recommended that you save your  
presentation as a PDF before sending it to  
third parties.

## How To Find and Replace Fonts on a Mac

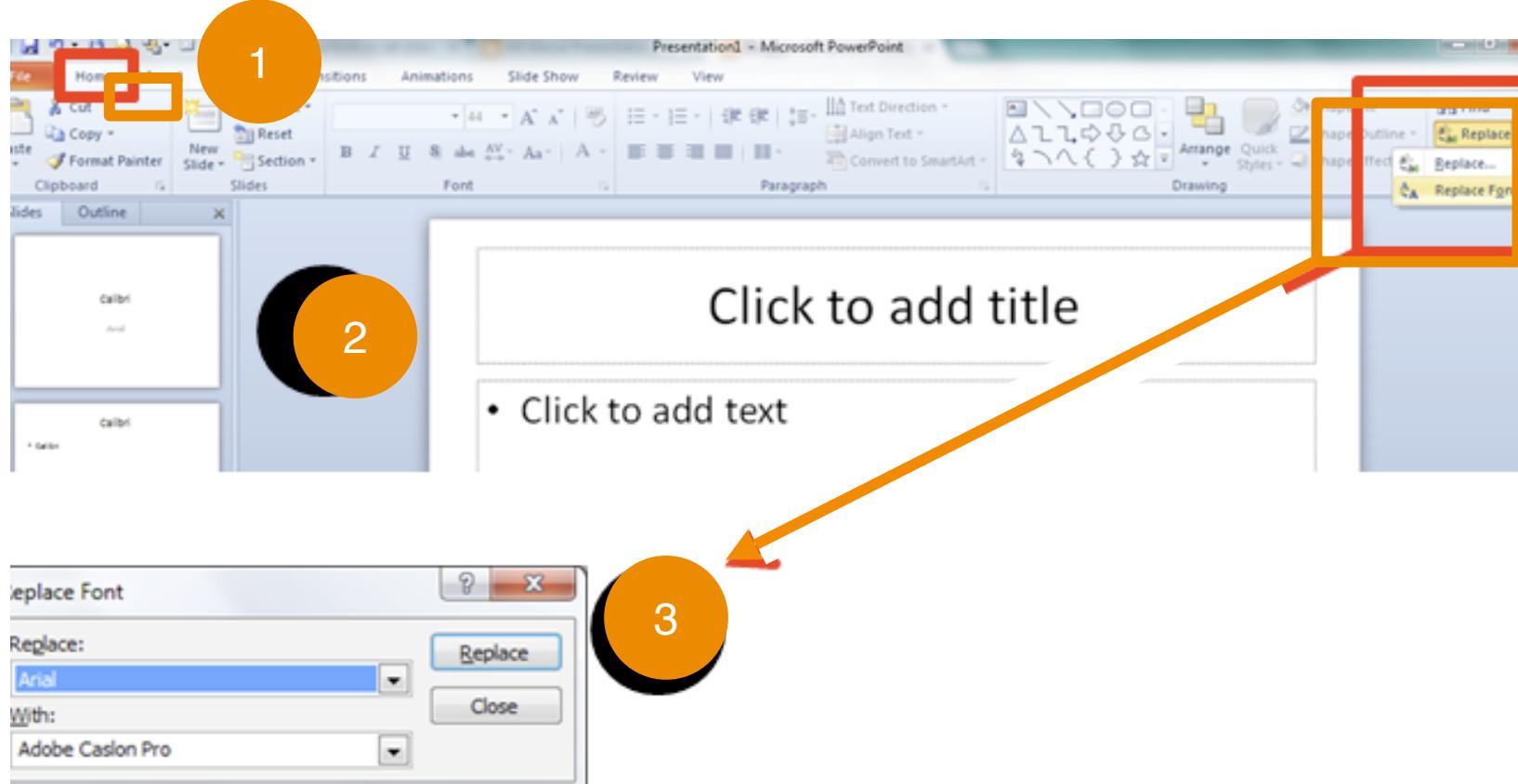
Select any text, go to Format>Replace Fonts>Change it to the New Font



OR



# How To Find and Replace Fonts (PC)



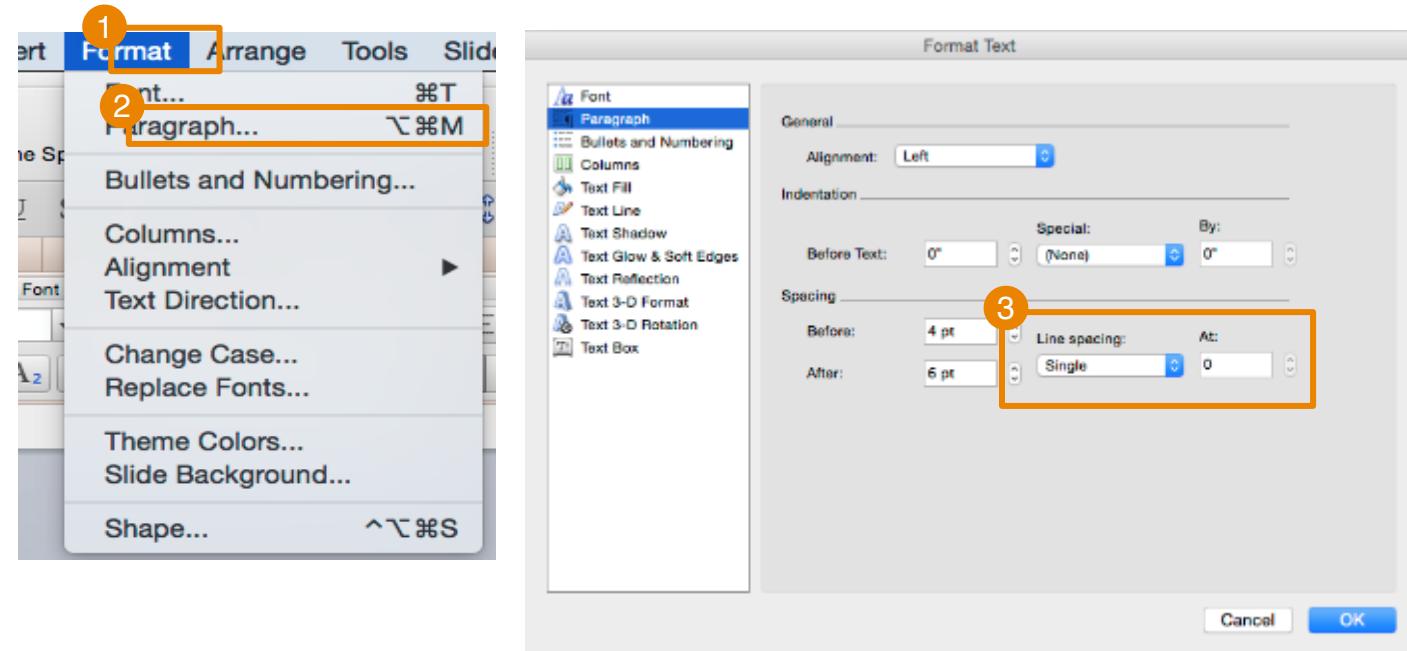
Select any text>Home Tab>Replace>Select Replace Fonts>Replace

# About Paragraph Line Spacing

Rather than using a carry return to create more space between paragraphs, you can master control by using the Line Spacing feature.

You can apply exact measurements to the spacing between paragraphs for consistency and uniformity.

Take a look at the setting currently built into a standard content/Basic Layout slide as a basis for better understanding how this feature works.



# How to Insert a Slide Number into All Slides in Your Deck

1 Copy the text box with the number 80 in it (bottom left of this slide)

2 Go to slide master

*View>Master>Slide Master*

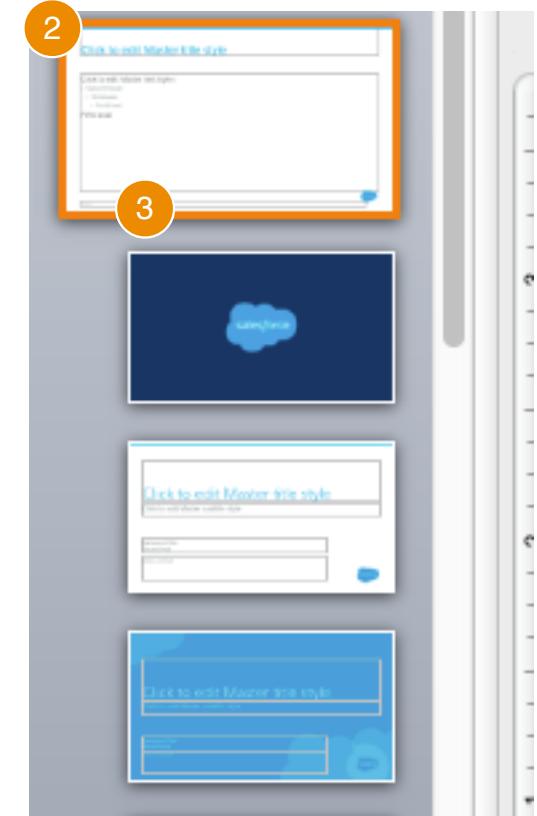
*(Make sure you are on the top level)*

3 Paste the text box you copied

*The number 1 will convert into the hash tag symbol (#)  
and be placed in the appropriate space*

This text box will cover up the footnote box in the slide master. However, since footnotes are something you add manually per slide, that will not effect anything unless you have a footnote on an actual page already.

NOTE: If you have a footnote on a slide when you paste page numbers into the master template you will want to move the footnote over. If you insert a footnote be sure to move it over to the right make room for the number or they will sit on top of each other.





This template maintained by the Corporate Messaging & Content team.  
Please send any questions to our [Chatter Group](#).

