

The Salesforce logo, consisting of the word "salesforce" in white lowercase letters inside a blue cloud-like shape.

salesforce

# Buttons, Buttons, Everywhere!

Midwest Dreamin' 2018



# Midwest Dreamin' 2018

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neocol

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springcm

## Gold Sponsors



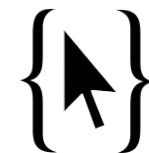
Fonteva





Phillip  
Southern

founder - clicks 2 code



clicks2code

phillip@clicks2code.com  
@phil7s

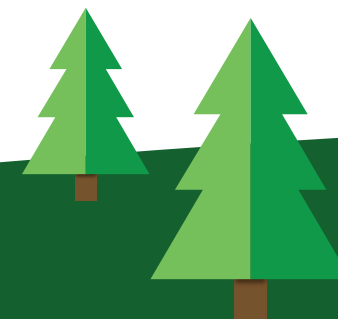


MVP

Salesforce MVP



Salesforce Certified



# A few questions....

- Who is in classic?
- Who has started looking at LEX, testing, etc?
- Who has partial implemented LEX?
- Who has fully implemented LEX?

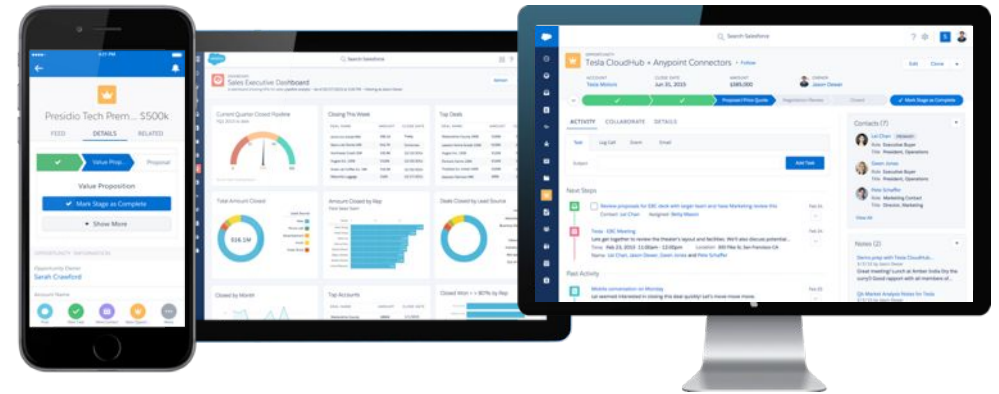
# Goals

1. Set a baseline understanding.
2. Talk through the whys/hows.
3. Hopefully inspire you to reimagine your buttons.



# Why move to Lightning?

- LEX is here
- LEX is the future
- More button options
- Location, location, location



# What's in a button?

## Standard Button

Buttons you get OOTB with Salesforce. Can override.  
New, Edit, Delete, Clone.....



Override Standard Button or Link

Help for this Page ?

Edit

Overriding a standard button or link changes what happens when a user clicks on it. For example, instead of having a standard Salesforce page appear when a user clicks View, you can have the View button launch a custom s-control, Visualforce page, Lightning component, or Lightning page instead.

Overrides also apply to programmatic customizations of the same actions. For example, firing the View record event uses the same setting, and performs the same action, as the user clicking View for that record.

You can set different override behavior for Salesforce Classic, Lightning Experience, and mobile.

Override Properties

Save Cancel

Label	Edit
Name	Edit
Default	Standard page
Salesforce Classic Override	<div><div><input checked="" type="radio"/> No override (use default) ⓘ</div><div><input type="radio"/> Visualforce page --None-- ▾</div></div>
Lightning Experience Override	<div><div><input type="radio"/> Lightning component --None-- ▾</div><div><input checked="" type="radio"/> Use the Salesforce Classic override</div></div>
Mobile Override	<div><div><input type="radio"/> Lightning component --None-- ▾</div><div><input checked="" type="radio"/> Use the Salesforce Classic override</div></div>

Save Cancel





# What's in a button?

## URL Button

Custom button with URL content source → Outside or Salesforce URL, URL Hack.

Edit Account Custom Button or Link Help for this Page ?

### Create Coffee Task

**Custom Button or Link Edit** Save Quick Save Preview Cancel

Label

Name  ⓘ

Description

Display Type  
☐ Detail Page Link [View example](#)  
☒ Detail Page Button [View example](#)  
☐ List Button [View example](#)

Behavior  [View Behavior Options](#)

Content Source

**Quick Tips**

- [Getting Started](#)
- [Sample Buttons & Links](#)
- [Operators & Functions](#)

Select Field Type

Insert Field

Insert Operator

Functions

ABS

ADDMONTHS

AND

BEGINS

BLANKVALUE

CASE

Insert Selected Function



# What's in a button?

## Visualforce

Button to source a Visualforce page → Custom UI, Execute Apex Methods, Flow

Edit Account Custom Button or Link Help for this Page ?

### FIND COFFEE

**Custom Button or Link Edit** Save Quick Save Preview Cancel

Label

FIND COFFEE

Name

FIND\_COFFEE i

Description

Display Type

☐ Detail Page Link [View example](#)

☒ Detail Page Button [View example](#)

☐ List Button [View example](#)

Behavior

Display in existing window with sidebar View Behavior Options

Content Source

Visualforce Page

Content

AccountFindCoffee [AccountFindCoffee]

Save Quick Save Preview Cancel

**Quick Tips**

- [Getting Started](#)
- [Sample Buttons & Links](#)
- [Operators & Functions](#)

# What's in a button?

## OnClick Javascript

Execute Javascript source code when clicked → Error checking and field validations, Field value manipulation, Creating records, URL redirects based on inputs.

Account Custom Button or Link Help for this Page ?

FIND COFFEE JS

Custom Button or Link Detail

EditDeleteWhere is this used?

Label	FIND COFFEE JS	Object Name	Account
Name	FIND_COFFEE_JS		
Behavior	Execute JavaScript	Display Type	Detail Page Button
OnClick JavaScript	<pre>if({!ISBLANK(TEXT(Account.Type))}) {   alert ("Type must be selected before you can continue!"); } else {   window.open('https://www.google.com/maps/search/coffee+{!Account.BillingStreet}+{!Account.BillingCity}+{!Account.BillingState}+ {!Account.BillingPostalCode}', '_blank'); } </pre>		
Description			
Created By	Phillip Southern, 7/3/2018 10:33 AM	Modified By	Phillip Southern, 7/3/2018 5:40 PM

EditDeleteWhere is this used?





# Example

# Moving buttons to Lightning.....

# What's an Action?

Standard Chatter Actions	Post, File, Link, Poll, Question, Thanks, and Announcements
Default Actions	Post, File, New Event, New Task, New Contact, Log a Call, New Opportunity, New Case, New Lead, Thanks, Link, Poll, Question
Productivity Actions	Send Email, Call, Map, View Website, and Read News
Custom Actions	In classic referred to Quick Actions, In lightning referred to Actions.

# Custom Action

Account Actions  
New Action

**Enter Action Information** Save Cancel

Object Name  i

Action Type  ▼

Target Object  ▼ i

Standard Label Type  ▼ i

Label

Name  i

Description  i

Create Feed Item ☒ i

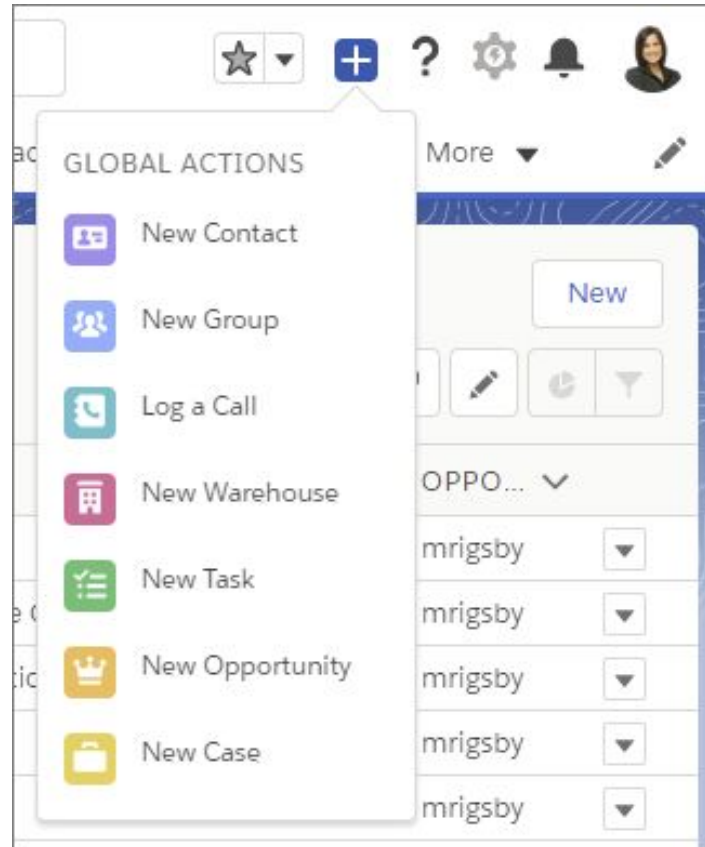
Success Message  i

Icon [Change Icon](#)

Save Cancel

- ✓ Create a Record
- Send Email
- Log a Call
- Custom Visualforce
- Update a Record
- Lightning Component
- Flow

# Actions in LEX





# Actions in LEX

Accounts

All Accounts ▾

New Import

14 items • Sorted by Account Name • Updated a minute ago

⚙️

📊

🔄

✎

📈

🔍

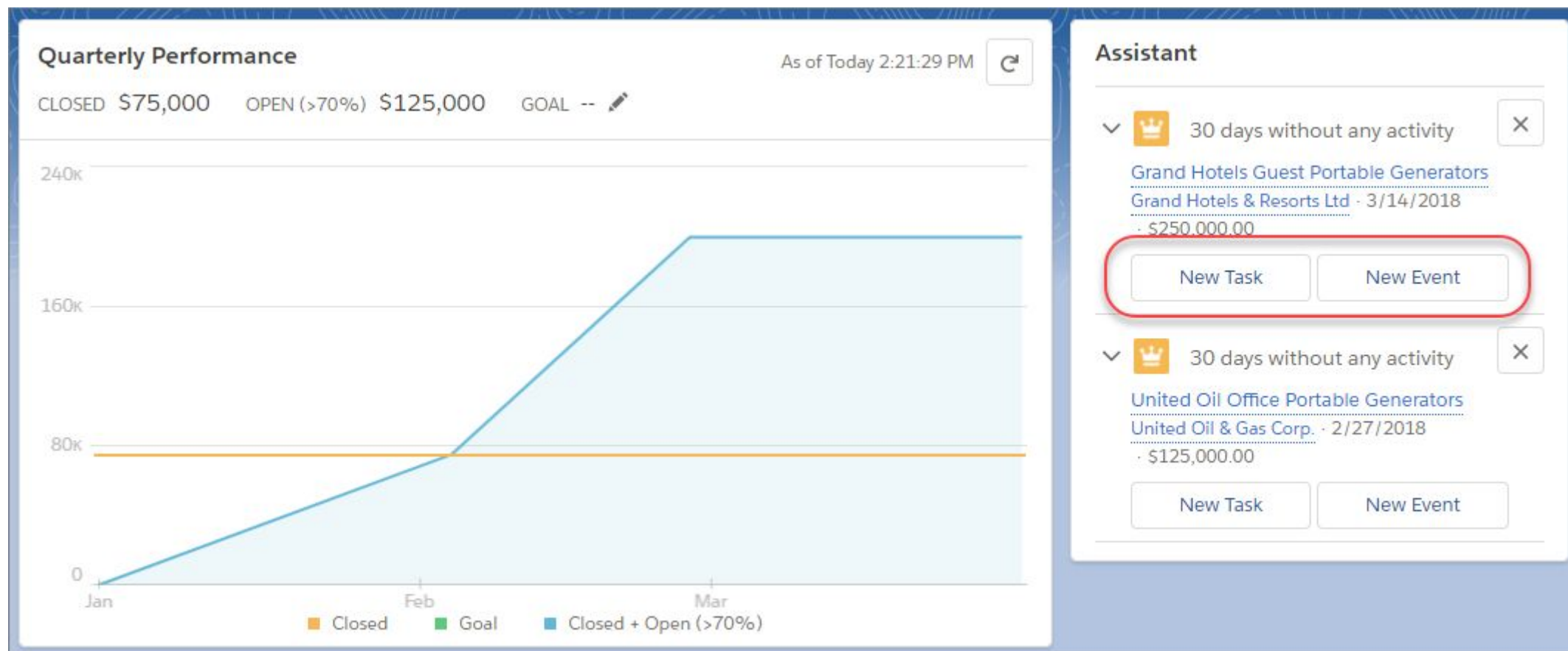
	<input type="checkbox"/> ACCOUNT NAME ↑	ACC... ▾	BILLING ... ▾	PHONE	TYPE	ACCO... ▾
1	<input type="checkbox"/> Barbary Coast Wireless		CA	415-555-3284	Customer - Direct	AI User ▾
2	<input type="checkbox"/> Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	
3	<input type="checkbox"/> Dickenson plc		KS	(785) 241-6200	Customer - Channel	
4	<input type="checkbox"/> Edge Communications		TX	(512) 757-6000	Customer - Direct	
5	<input type="checkbox"/> Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	
6	<input type="checkbox"/> GenePoint		CA	(650) 867-3450	Customer - Channel	AUser ▾
7	<input type="checkbox"/> Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	AUser ▾

Edit

Delete

Change Owner

# Actions in LEX



# Actions in LEX

The image shows a Salesforce contact record for Mr. Sean Forbes. The interface includes a header with the contact's name and a sub-header with various action buttons. The main body is divided into two columns: 'RELATED' on the left and 'ACTIVITY' on the right. The 'RELATED' column shows a message about potential duplicates and a section for 'Opportunities (0)'. The 'ACTIVITY' column shows options to create new tasks, events, or calls. Four red boxes with numbers 1 through 4 highlight specific areas: 1 points to the top right action buttons, 2 points to the 'Contact Owner' field, 3 points to the 'ACTIVITY' tab, and 4 points to the 'New' button next to the 'Opportunities (0)' section.

Contact  
**Mr. Sean Forbes**

+ Follow Edit New Case New Note

Title: CFO Account Name: [Edge Communications](#) Phone(2): (512) 757-6000 Email: [sean@edge.com](mailto:sean@edge.com) Contact Owner: [Alex Rose](#)

RELATED DETAILS NEWS

We found no potential duplicates of this contact.

Opportunities (0) New

ACTIVITY CHATTER

New Task New Event Log a Call

Create a task... Add

1 2 3 4



# Palmer House Hilton

[Customize Page](#)

[Hide Feed](#)

Click to add topics:



Post

File

New Task

More

Write something...



Show All Updates



**Phillip Southern**

we should do a conference here

Click to add topics: No sugges

Comment · Like · Today at 6:0



**Phillip Southern**

hey, this is a cool account!

Comment · Like · Today at 6:0

New Contact

New Case

Log a Call

New Note

New Opportu...

New Event

Link

Poll

Question

Share

+ Follow

Followers

No followers.

[Contacts](#) [0] | [Opportunities](#) [0] | [Cases](#) [0] | [Open Activities](#) [0] | [Activity History](#) [0] | [Notes & Attachments](#) [0] | [Partners](#) [0]

## Account Detail

Edit

Delete

Include Offline

Account Owner Phillip Southern [\[Change\]](#)

Rating

Account Name Palmer House Hilton [\[View Hierarchy\]](#)

Phone

Parent Account

Fax

Account Number

Website

Account Site

Ticker Symbol

Type

Ownership

salesforce



Do you *really* need the button?

The background of the slide is a light blue topographic map. It features numerous white contour lines of varying thickness and style (solid and dashed) that flow across the frame. Several small, faint rectangular labels are scattered across the map, including 'AN' in the top center, 'SE' on the left, '36' in the bottom left, and 'AN' in the bottom right.

Is the button built the right way?









How can we reimagine this  
button?



# Moving to Lightning

Classic Button	Move to Lightning	
Standard Buttons	Standard Buttons (Just works!)	
URL Button	URL → URL Button (Just works!) Record URL Hack → Action w/Prefilled Values	
Visualforce	Visualforce *May need styling edits, activate for LEX/Mobile	
Javascript		

# Moving to Lightning.....Javascript

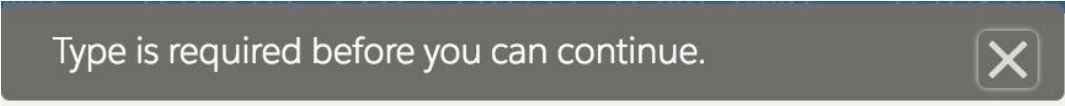
JS Button Top Use Cases	Lightning Alternatives	Declarative / Programmatic
Validate fields (pre-save)	Quick Actions ( <i>using default values and/or formulas</i> )	D
	Apex Triggers	P
Create records w/ pre-pop values	Quick Actions ( <i>using default values and/or formulas</i> )	D
Redirect to a record page	Custom URL Button	D
Redirect to a page (VF)	Visualforce Quick Actions	P
	Lightning Actions	P
Prefill values based on inputs	Lightning Actions	P
Confirmation pop-up screens	Lightning Actions	P
API calls ( <i>salesforce &amp; 3rd party</i> )	Lightning Actions	P
Feedback pop up screens	Lightning Actions	P
3rd party integration	Lightning Actions	P
Mass actions on listview records	Custom VF Buttons (on List Views)	P



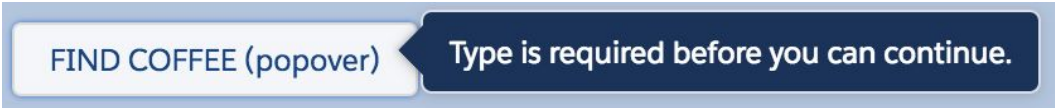
Demo....and let's reimagine

# Notifications

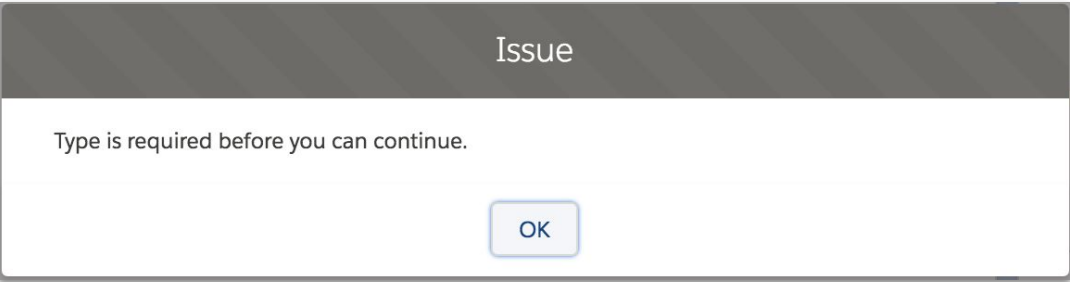
## Toast



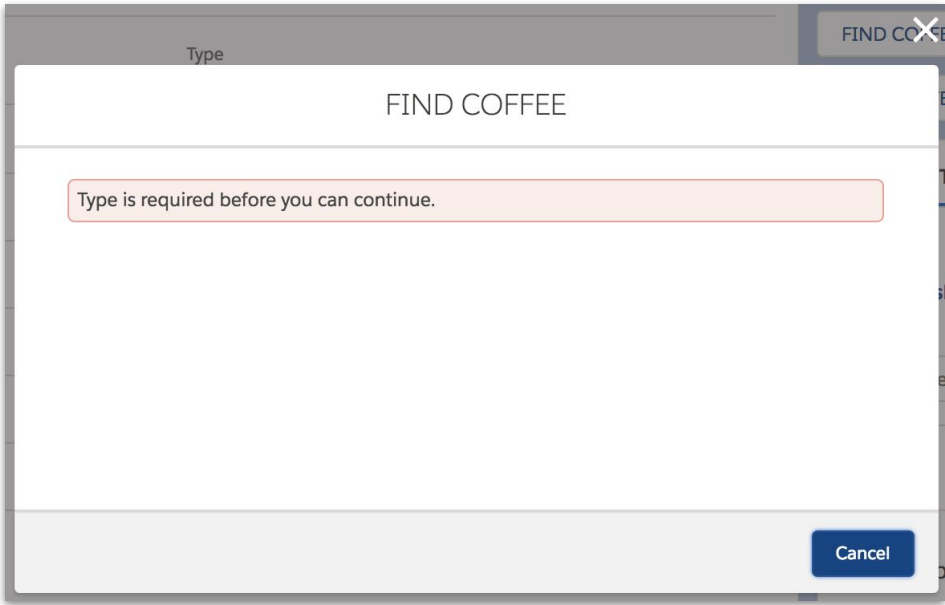
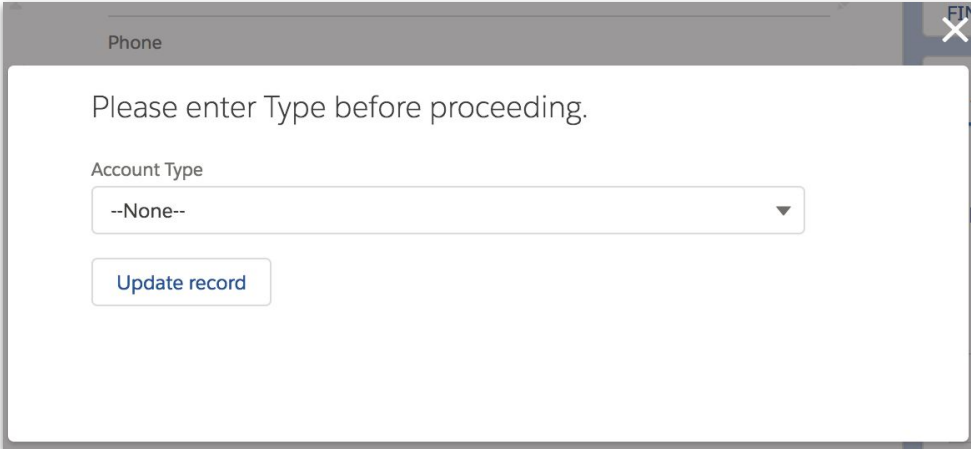
## Popover



## Prompt



## Components



# Trailhead!

## Modules

Lightning Alternatives to JavaScript Buttons

Lightning Experience Customization

## Trails

Make the Move to Lightning Experience

Get Started with Lightning Experience



# References

Sample Components for Lightning Actions

<https://github.com/developerforce/LEXComponentsBundle>

notificationLibrary

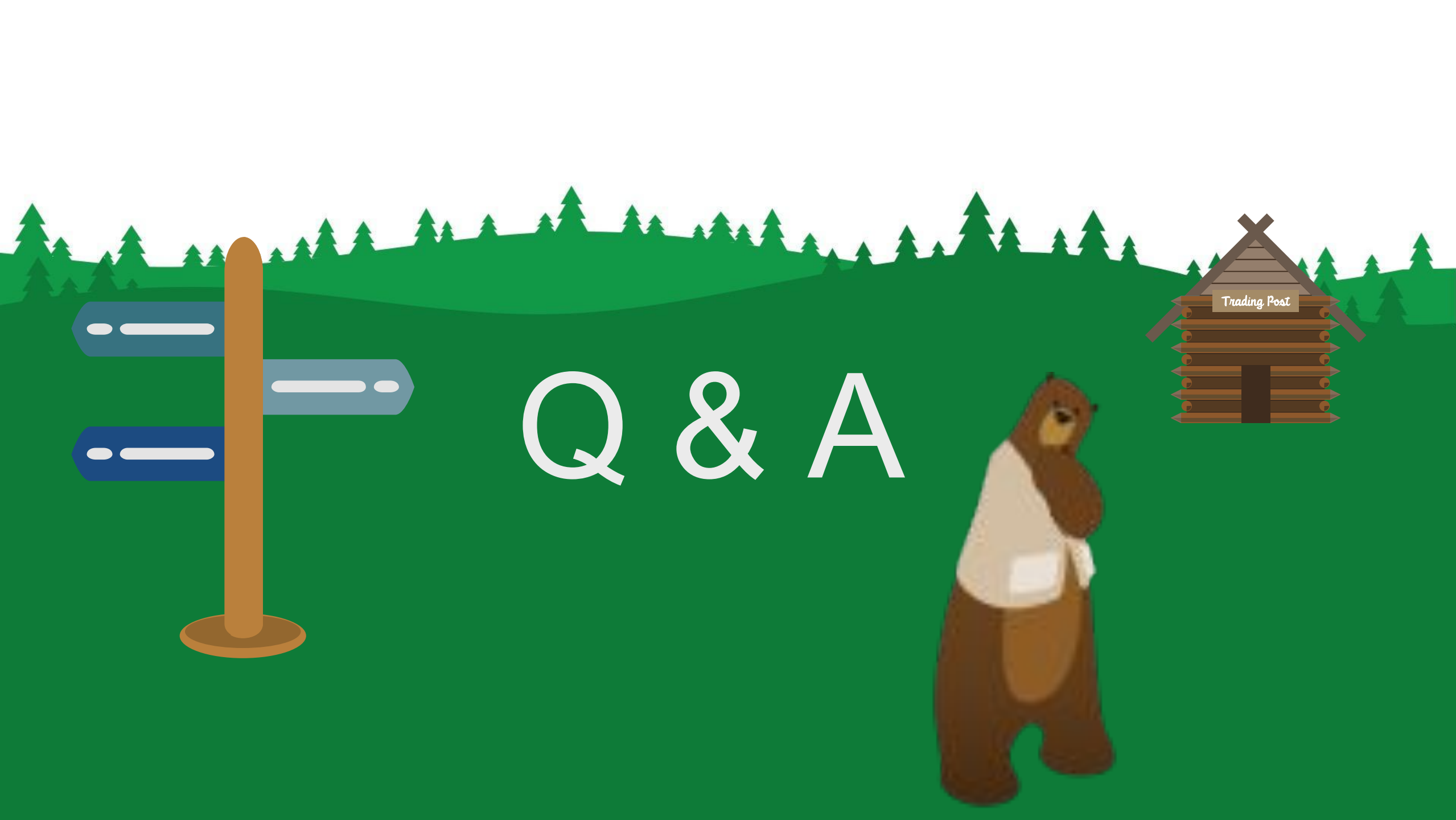
<https://developer.salesforce.com/docs/component-library/bundle/lightning:notificationsLibrary/documentation>

overlayLibrary

<https://developer.salesforce.com/docs/component-library/bundle/lightning:overlayLibrary/documentation>

Code Examples

<https://github.com/phillipsouthern/buttons-buttons-everywhere>



Q & A



<http://www.southeastdreamin.com/>



WHEN

March 21- 22, 2019

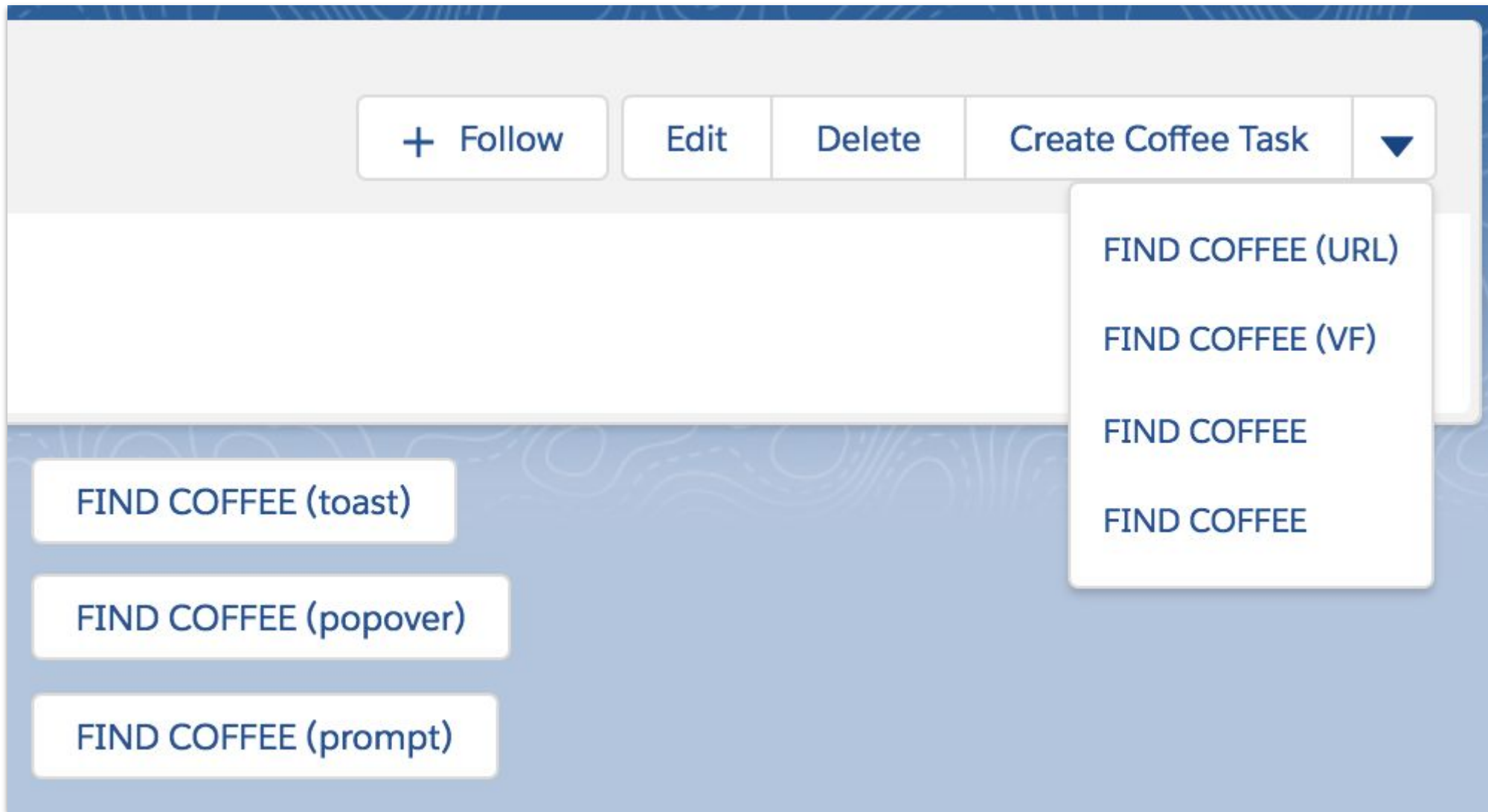


WHERE

Atlanta, GA  
Marriott Buckhead

thank you





# Notifications - Toast

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

More

Account

Palmer House

Type is required before you can continue.

+ Follow

Edit

Delete

Create Coffee Task

Type

Phone

Website

Account Owner

Phillip Southern

Account Site

Industry

DETAILS

RELATED

Account Owner

Phillip Southern

Account Name

Palmer House

Parent Account

Type

Phone

Fax

FIND COFFEE (toast)

FIND COFFEE (popover)

FIND COFFEE (prompt)

ACTIVITY

CHATTER



# Notifications - Popover

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

More

Account

Palmer House

+ Follow

Edit

Delete

Create Coffee Task

Type

Phone

Website

Account Owner

Phillip Southern

Account Site

Industry

DETAILS

RELATED

Account Owner

Phillip Southern

Account Name

Palmer House

Parent Account

Account Number

Type

Phone

Fax

Website

FIND COFFEE (toast)

FIND COFFEE (popover)

FIND COFFEE (prompt)

ACTIVITY

CHATTER

Type is required before you can continue.

# Notifications - Prompt

SalesHomeOpportunitiesLeadsTasksFilesAccountsContactsCampaignsDashboardsReportsChatterMore

AccountPalmer House

+ FollowEditDeleteCreate Coffee Task

TypePhoneWebsiteAccount OwnerPhillip SouthernAccount SiteIndustry

DETAILSRELATED

Account OwnerPhillip Southern

Account NamePalmer House

Parent Account

Account Number

Account Site

Industry

Annual Revenue

Type

Phone

Fax

FIND COFFEE (toast)

FIND COFFEE (popover)

FIND COFFEE (prompt)

ACTIVITYCHATTER

Log a CallEmailCreate C...

sk

Log a task...Add

Filters: All time • All activities • All types

RefreshExpand All

Issue

Type is required before you can continue.

OK



# Notifications - Input Component

SalesHomeOpportunitiesLeadsTasksFilesAccountsContactsCampaignsDashboardsReportsChatterMore

AccountPalmer House

+ FollowEditDeleteCreate Coffee Task

TypePhoneWebsiteAccount OwnerPhillip SouthernAccount SiteIndustry

DETAILSRELATED

Account OwnerPhillip Southern

Account NamePalmer House

Parent Account

Account Number

Account Site

Industry

Annual Revenue

Billing Address17 E Monroe StChicago, IL 60603

Shipping Address

FIND COFFEE (toast)

FIND COFFEE (popover)

FIND COFFEE (prompt)

Log a CallEmailCreate C...

Filters: All time • All activities • All types

RefreshExpand All

Next StepsMore Steps

Please enter Type before proceeding.

Account Type--None--

Update record



# Notifications - Output Component

The screenshot shows a Salesforce interface for the 'Palmer House' account. The account owner is Phillip Southern. A modal dialog titled 'FIND COFFEE' is open, displaying the error message 'Type is required before you can continue.' in a red-bordered box. The dialog has a 'Cancel' button at the bottom right. In the background, there are buttons for 'FIND COFFEE (toast)', 'FIND COFFEE (popover)', and 'FIND COFFEE (prompt)'. The account details on the left include fields for Account Owner, Account Name, Parent Account, Account Number, Account Site, Industry, Annual Revenue, Billing Address, and Customer Priority.

Account Owner: Phillip Southern

Account Name: Palmer House

Parent Account:

Account Number:

Account Site:

Industry:

Annual Revenue:

Billing Address: 17 E Monroe St, Chicago, IL 60603

Customer Priority:

SLA:

Details: FIND COFFEE (toast), FIND COFFEE (popover), FIND COFFEE (prompt)

Buttons: + Follow, Edit, Delete, Create Coffee Task

Filters: All time • All activities • All types

Buttons: Log a Call, Email, Create C..., Add, Refresh, Expand All, More Steps

Message: No next steps. To get things moving, add a task or set up a meeting.