Classic to Lightning Migration

Version 1.9

> Note: By following the steps outlined in this document, you agree to performing the migration process for your organization entirely on your own - only receiving support from Propertybase through normal support channels.

Table of Contents

Section 1: Activate Sandbox Environment

In this section, we will create our sandbox environment.

> Note: Please click here if you have not read through the information in our Migration Considerations and Prerequisites article.

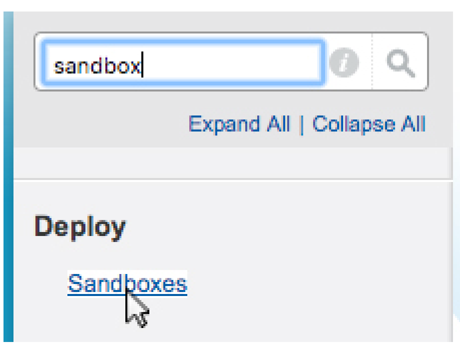
> Note: If you choose not to utilize the sandbox method, you can skip this section and any other sections that reference a sandbox. (This method should be performed at your own risk.) Please note that if you choose to perform this migration in a production environment, **no users should be in the system while performing this migration and no data should be modified or changed during the migration process**. In other words, you should stop any and all activity for your Propertybase account until the migration process is complete.

1a: Sandbox Creation

Follow the instructions below to create a sandbox environment.

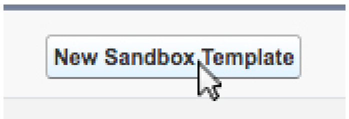
- First, **click Setup** at the top of the screen.

- **Type Sandboxes** in the Quick Find box, then **click Sandboxes**.

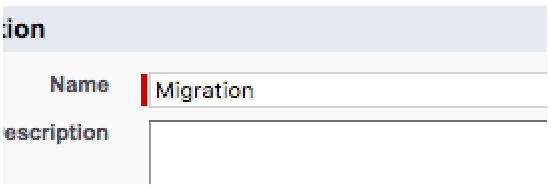


- **Click the Sandbox Templates Tab**.

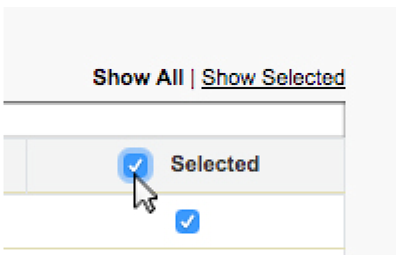
- **Click New Sandbox Template**.



- **Enter a name** for the Sandbox Template.



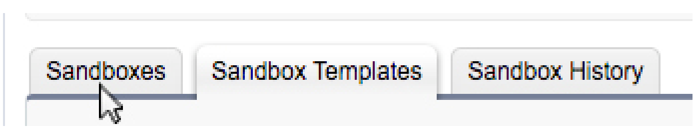
- **Click the checkbox** next to Selected to select all objects.



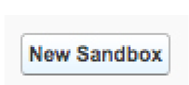
- **Click Save**.

Now that we've created our sandbox template, let's create our sandbox.

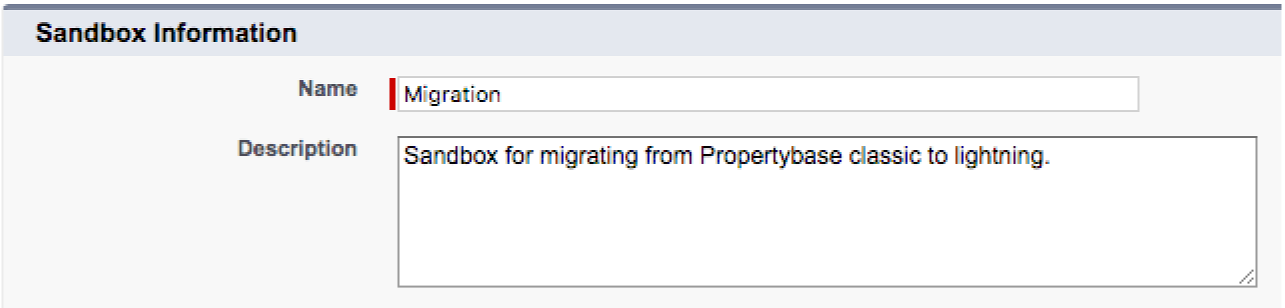
- **Click the Sandbox tab**.



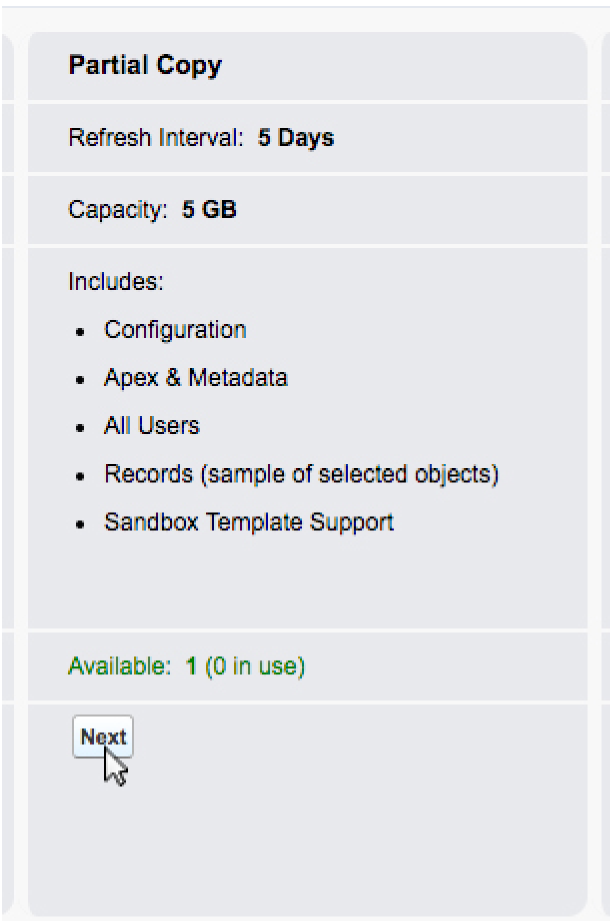
- **Click New Sandbox**.



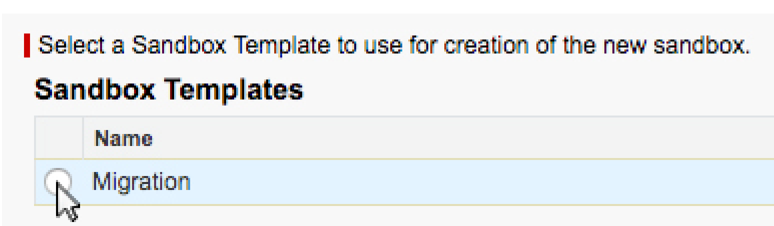
- **Enter a name** for your sandbox.



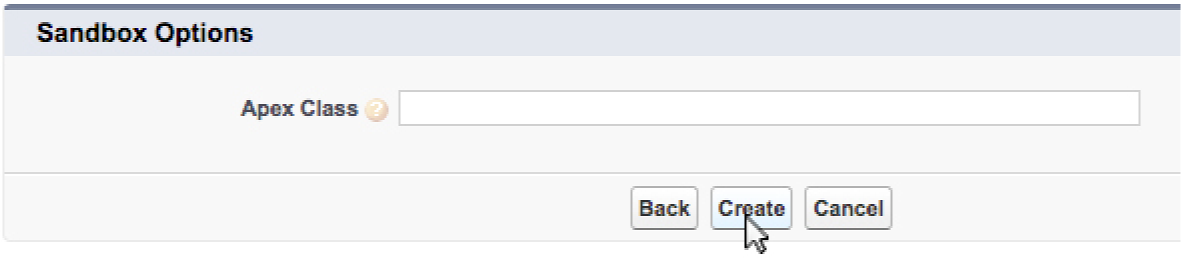
- Then **click Next**, under Partial.



- **Select Migration** (or whatever you named it in the previous step) as your sandbox template.



- Scroll to the bottom of the page, ignore Sandbox options, and **click Create**.



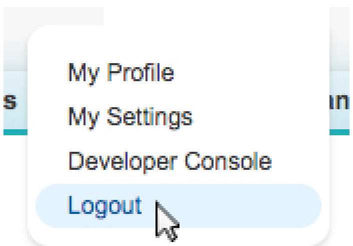
Done! Now we just need to wait for our sandbox to be created - this can take up to five minutes.

Simply refresh the page periodically to see if the new sandbox is ready. (You will also receive an email when it is ready.)

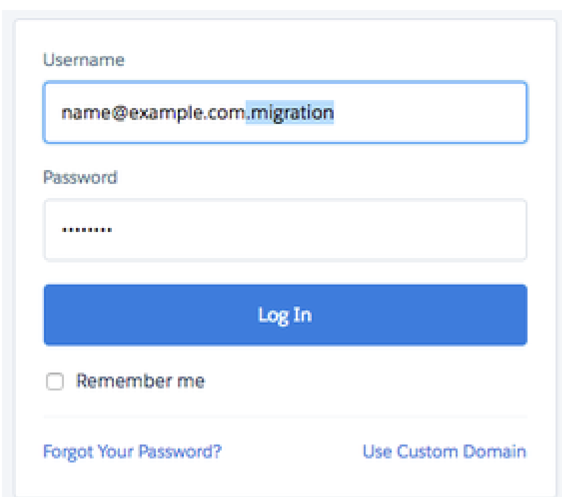
1b: Sandbox Login

Now that our sandbox is ready, we need to login to it.

- **Click your name** at the top of the screen, then **click Logout**.

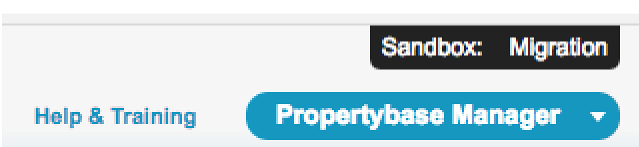


- For Username, use your normal username, except with ".migration" added to the end. (See example below.)



- Use your normal password and **click Log In**.

Upon successful login, you will see "Sandbox: Migration" at the top of the screen.



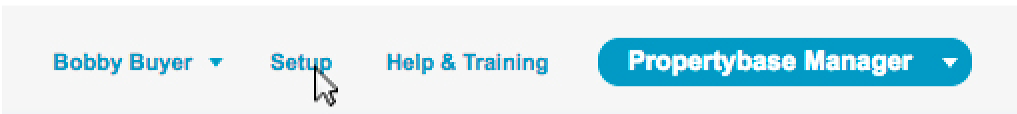
If you see this message, please move to the next section.

Section 2: Complete the Lightning Experience Migration Assistant

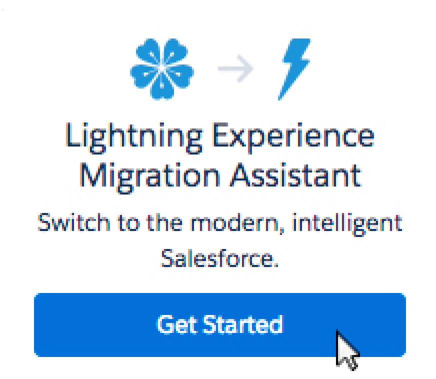
This section will walk through the Lightning Experience Migration Assistant and the process of activating Propertybase Lightning.

2a: Enable Features and Check Domain Status

- In the top right of your screen, **click Setup**.

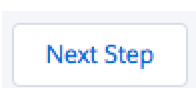


- **Click Get Started** on the left side of the screen, next to the Lightning Experience Migration Assistant content box.



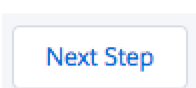
Upgrade time! this built-in migration assistant will guide us through the next several steps.

- **Click Next Step**, in the lower right corner.

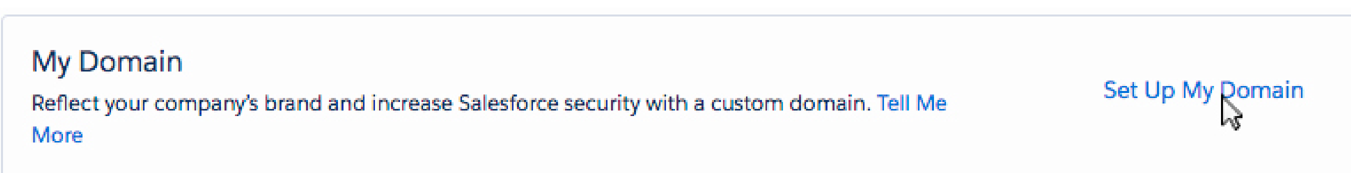


- Please skip the next two screens. **Click Next Step** (twice) in the lower right corner.

The reason we ask you to skip the “Check Readiness” and “Preview” screens, is beacuse Propertybase has already taken the necessary steps to make sure you are ready to upgrade to Lightning.

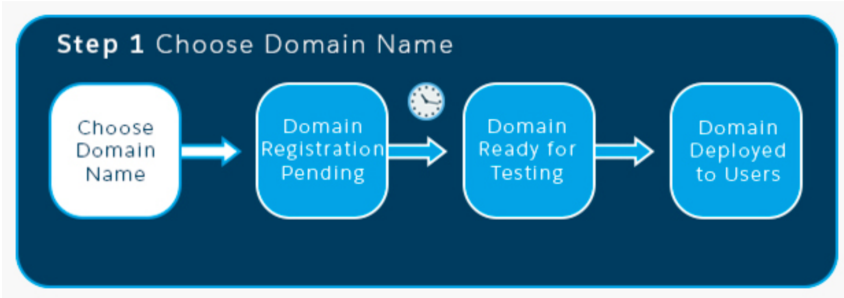


- Next we need to check your domain status. **Click Set Up My Domain**.

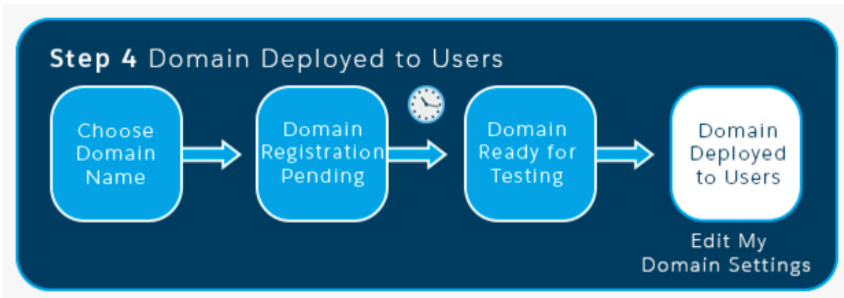


On the My Domain screen, note the status of your domain. If you have a domain setup and registered, “Domain Deployed to Users” will be highlighted white. If not, “Choose Domain Name” will be highlighted white. (See below.)

Unregistered Domain



Registered Domain



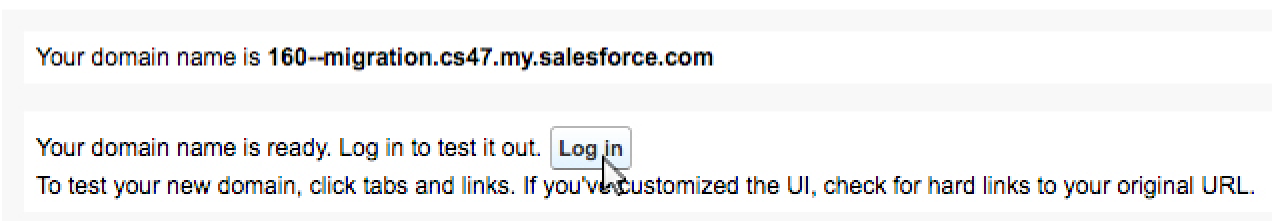
1. If your **domain is unregistered** (first image above) we need to do that first. Leave the migration assistant open and in a new tab, let's register your domain.
2. If your **domain is registered** (second image above) we can continue with the migration process. Close the My Domain window and continue below with the step titled "Once You Have Registered My Domain".

> Note: Regardless of your domain status, the migration assistant will continue to display the "Set Up My Domain" link. Once your domain is registered, you can safely ignore this.

> Note: Write down of the name of your domain. At the end of the migration process we will repeat this step (in a production environment) and the two domains should be the same.

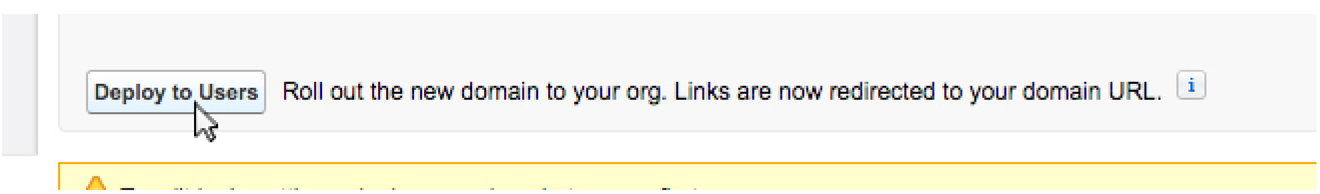
Once You Have Registered My Domain

- **Click the Log in button** to login to your domain (if you were previously registered, just make sure you are logged in.)



Once you have logged into your new domain, we need to deploy the domain to the users in your organization.

- **Click Deploy to Users**.



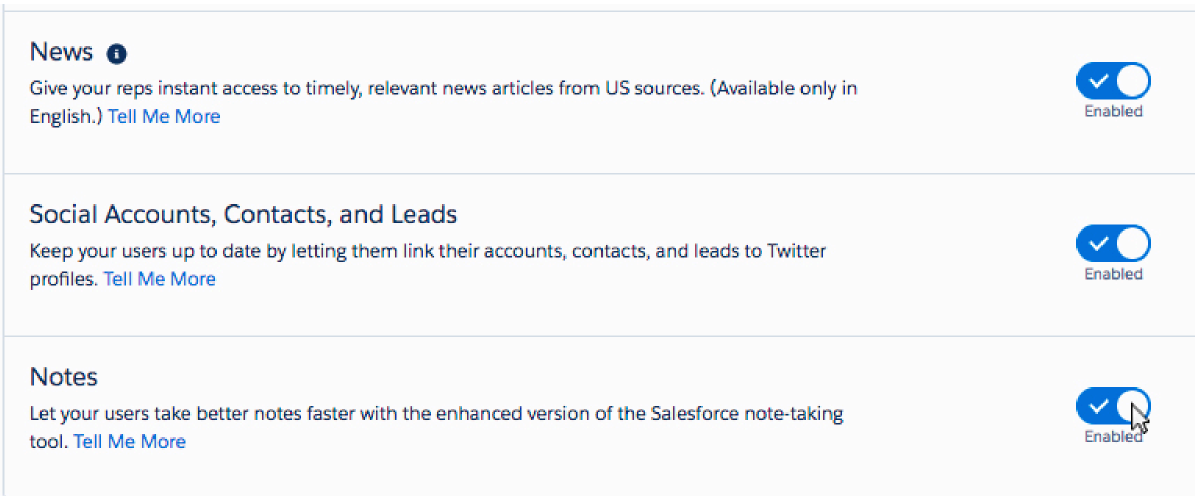
- **Click Ok** when asked "Are you sure you want to deploy this domain?"

> Note: Once the migration process is complete, remember to instruct all users in your organization to use the new URL.

- **Close the domain window** and return to the Lightning Experience Migration Assistant screen.

Next we need to turn on News, Social Accounts, Contacts, and Leads and Notes.

- To do this, **click the toggle switch** next to each.

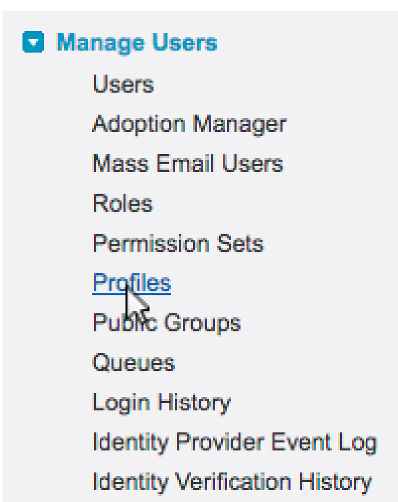


- **Click Next Step** in the lower right corner.

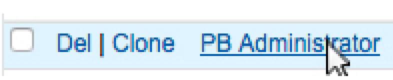
2b: Enable Lightning for Propertybase Profiles

Next we will enable Lightning for specific Propertybase profiles. For this section, **perform all steps in a new tab** - leaving the current migration assistant window open.

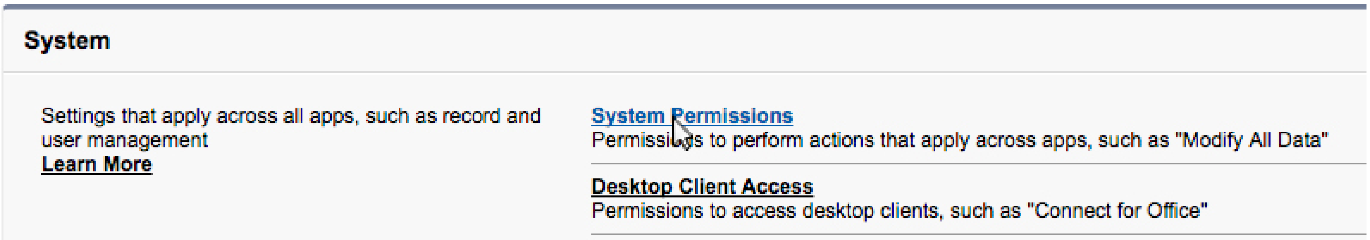
- In a new tab, **click Manage Users** and then **click Profiles** on the left side of the screen.



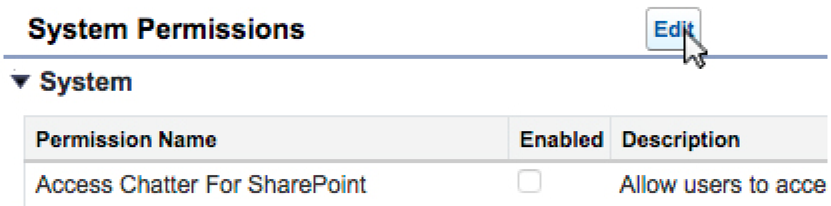
- On the next screen **click PB Administrator** in the list of profiles.



- Scroll down the page and **click System Permissions**.



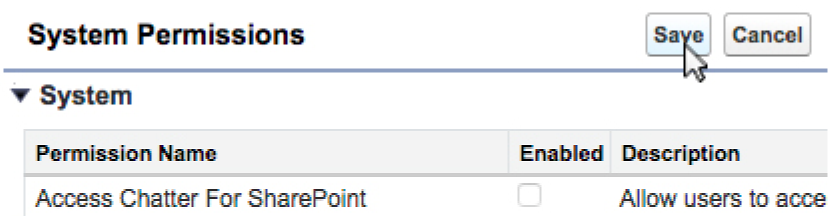
- Next, **click Edit** at the top of the page.



- Scroll down the page and **check the Lightning Experience User option**.

Note: If you receive an error when saving permissions, that means you need to check the "Create and Set Up Communities" permission as well. See image below.

- To save your changes, scroll to the top of the page and **click Save**.

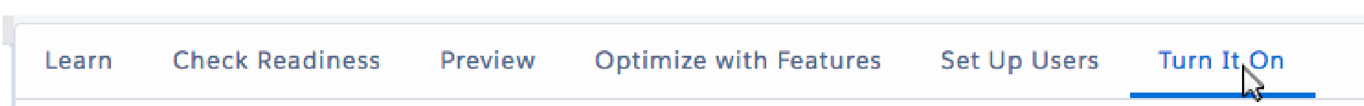


Repeat those step until you have enabled the Lightning Experience for the following profiles: **PB Agent, PB Readonly** and **PB Superuser**. (As well as any **custom profiles** set up by the org.)

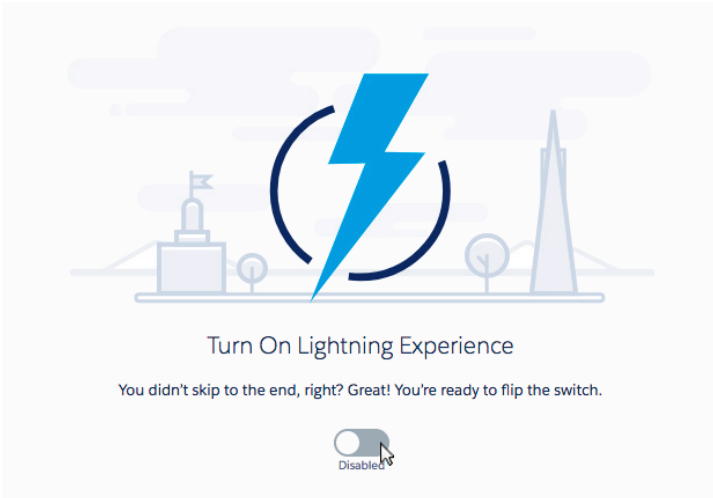
2c: Enable Lightning Experience

Now that our Propertybase org is prepared for Lightning, it's time to flip the switch!

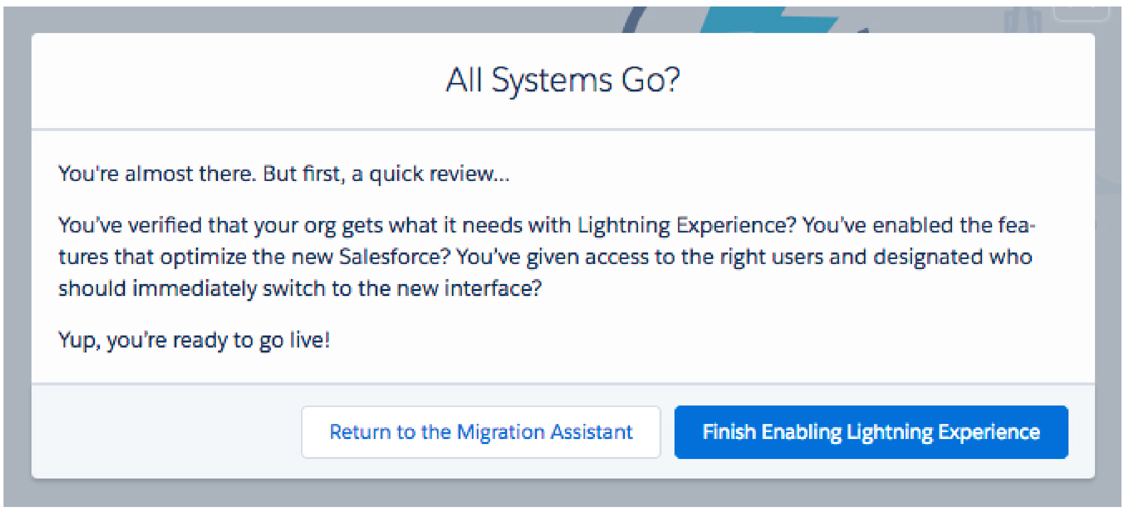
- Navigate back to the Lightning Migration Assistant and **click Turn It On** in the list of navigation tabs.



- Next, **toggle the switch** at the bottom of the page.

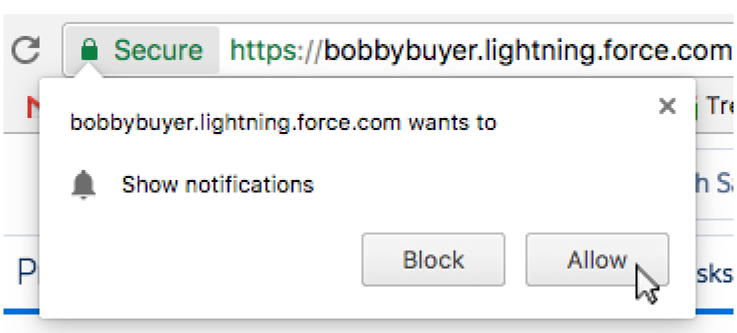


- When prompted, **click Finish Enabling Lightning Experience**.



- To switch to the Lightning experience, **click Switch to Lightning Experience** at the top of the screen.

Note: The first time you load Propertybase Lightning, you will be asked if you want to allow notifications. Please select Allow. This will ensure you receive notifications and reminders for tasks and similar features.



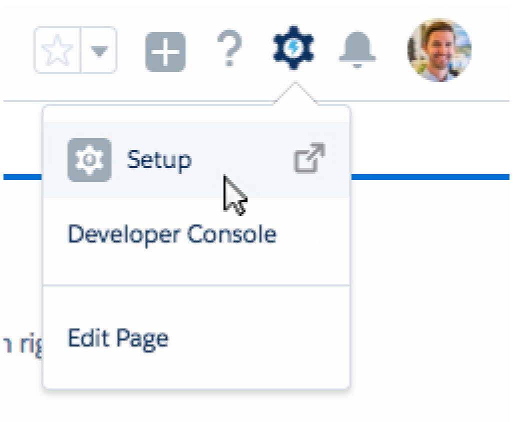
Congratulations! You have successfully completed the Lightning Experience Migration Assistant. In the next section we will perform basic cleanup, as well as remove unnecessary configurations leftover from your Propertybase Classic account. Later on, we will start configuring Lightning to fit your specific real estate needs.

Section 3: Remove 3rd Party Apps and Deprecated Configurations

Now that we have Lightning installed, lets remove any depricated configurations we might have, as well as any unused 3rd-party applications leftover from our Classic installation.

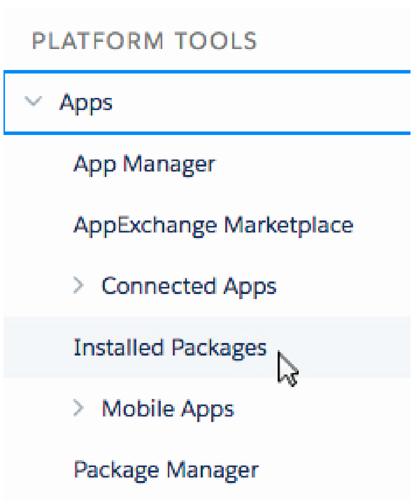
3a: Remove Unused 3rd Party Applications

- **Click the gear icon** in the top right of the screen, then **click Setup**.



This will open a page called Setup. It would be wise to get familiar with this page, as this page is where you configure everything for your Propertybase account. From managing users & profiles, configuring page layouts, automating tasks and more - it all happens in Setup.

- Next, **click Installed Packages** underneath Apps on the left side of the screen.

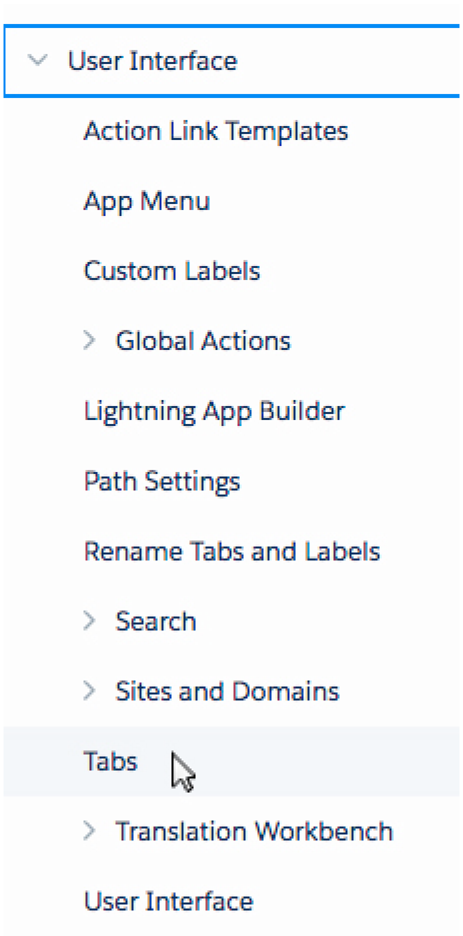


- On this screen, **remove 3rd-party packages** that you do not use.

Note: DO NOT remove any packages published by Salesforce.com or Propertybase. If you are unsure about removing a package, please submit a support request and ask for clarification. In the meantime you can continue with the migration process.

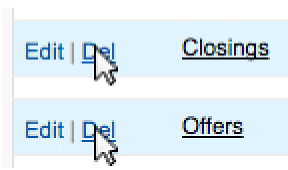
3b: Remove Depricated Classic Configurations

- From Setup, **click Tabs** underneath User Interface on the left side of the screen.



Note: If you have any custom List Views for Closings and/or Offers, please stop migrating and contact migration support. In your request, **state that you are in the middle of a migration** and **need assistance exporting custom list views**. Once you have been assisted, continue the migration process below.

- If you don't have custom list views, **click the 'Del' link** next to the listing for both Closings and Offers.



In commercial orgs, Offers is called Deals. So you would delete "Deals" and "Closings".

Done! You have successfully prepared your Propertybase installation for the next step in the Lightning migration process.

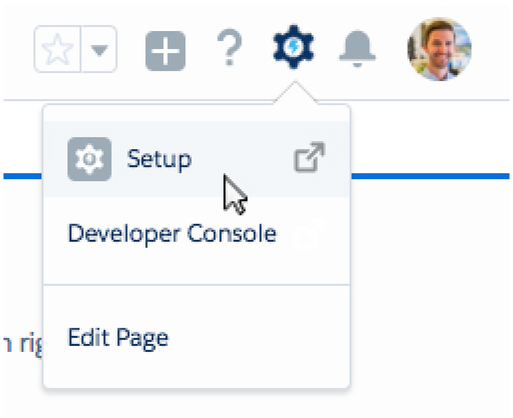
Section 4: Configure Object Settings

In this next section, we will remove deprecated Classic features and lay the groundwork for new Lightning features.

4a: Configure Listing Object

In the following section we will update the Listing page layout with Lightning components.

- **Click the gear icon** in the top right of the screen, then **click Setup**.

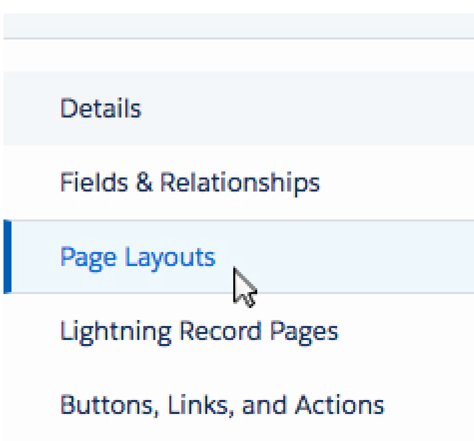


- **Click Object Manager** at the top of the screen.

This will open the Object Manager. You definitely want to familiarize yourself with this screen and it's intricacies. We will be spending a lot of time on this screen throughout the rest of the migration process.

- Scroll down and **click Listing**.

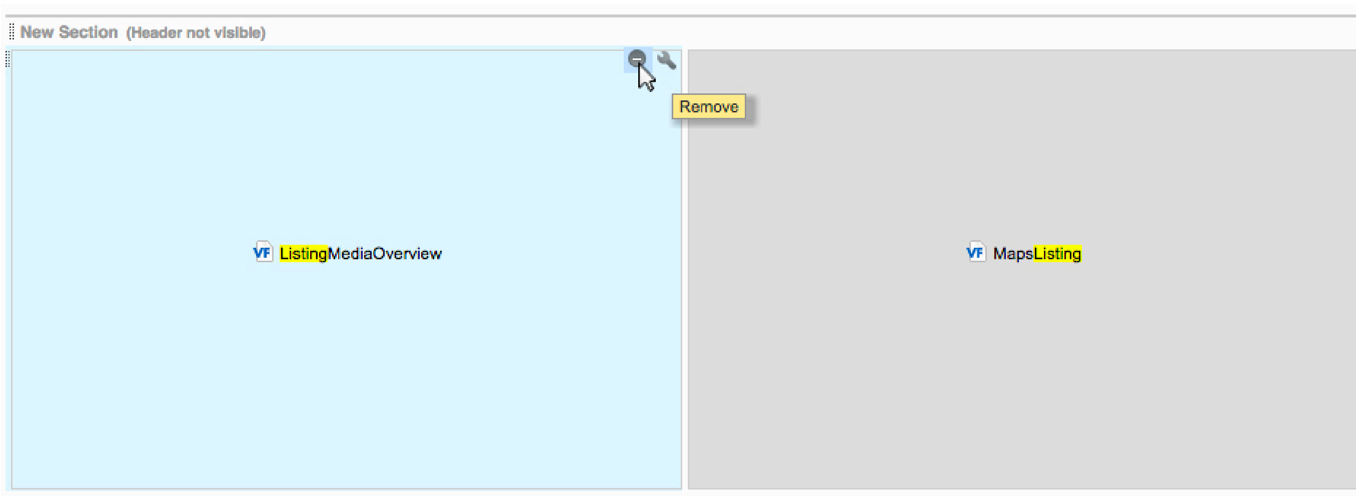
- On the left side of the screen, **click Page Layouts**.



You should see Rent and Sale listed under Page Layouts by default. If you have created custom page layouts prior to this migration, you will want to update those layouts (using the instructions below) as well.

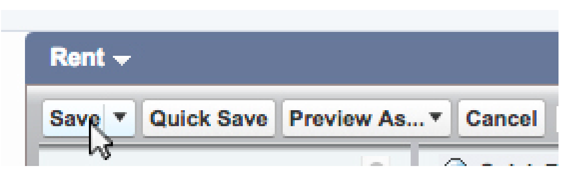
- **Click Rent** under Page Layouts.

- **Scroll down the page** and **delete the following VisualForce (VF) components**. (The component can be deleted by clicking the Remove icon in the top right corner of the component.)
    - ListingCoverflow
    - ListingMediaOverview
    - MapsListing



Note: Not all accounts will have the VisualForce components listed above, just delete the ones you do have.

- Next, scroll back to the top of the page and **click Save**.



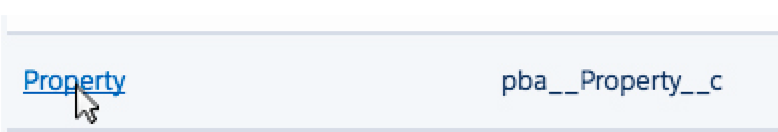
- **Repeat that process for the Sale layout**, as well as any custom Page Layouts if you have them.

4b: Configure Property Object

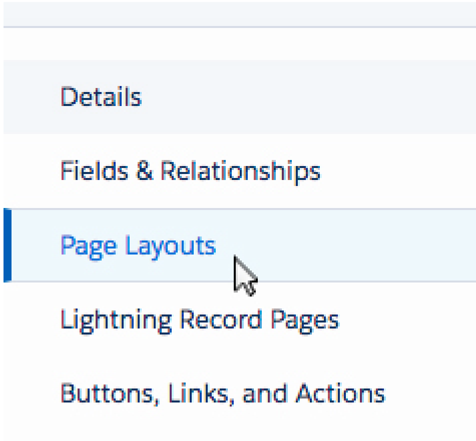
In this section we will perform similar actions to those in the previous section, this time on the Property object.

- **Click Object Manager** at the top of the screen.

- Scroll down the list of Objects and **click Property**.



- On the left side of the screen, **click Page Layouts**.

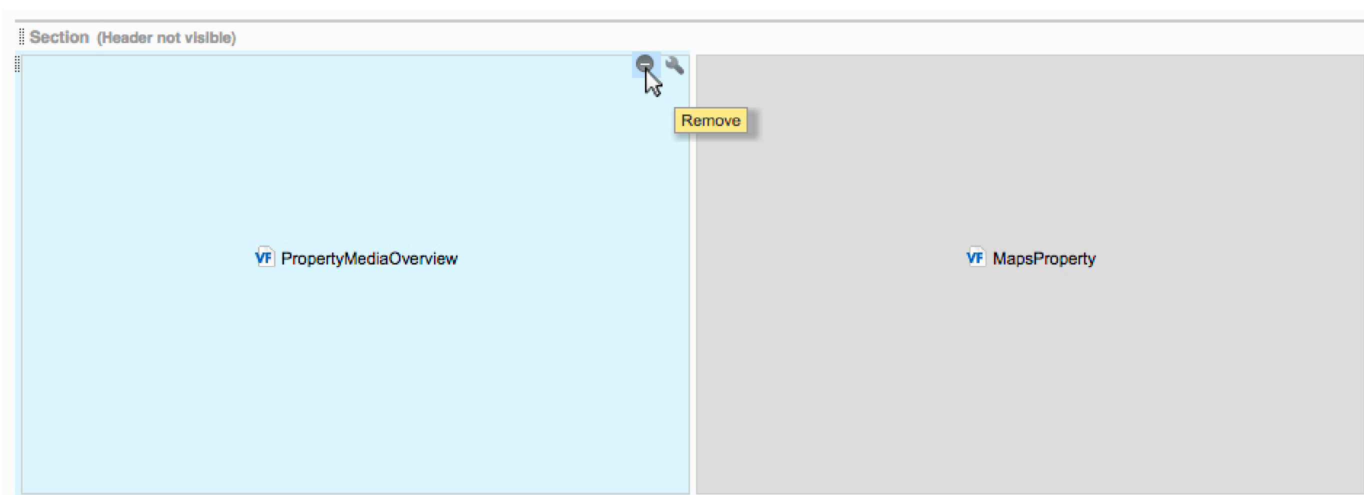


You should see Building / Masterproperty, Project Layout and Property Layout listed under page layouts by default. If you have created custom page layouts prior to this migration, you will want to update those layouts as well.

> Note: Not all accounts will have the Building / Masterproperty and Project page layouts. If you don't have those, simply update the Property page layout (it is the only mandatory layout in this step.)

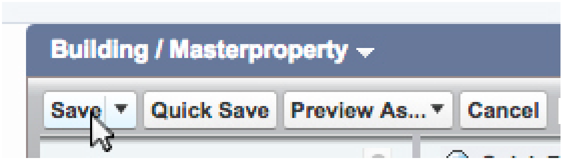
- **Click Building / Masterproperty under Page Layouts.**

- **Scroll down the page** and **delete the following VisualForce (VF) components**. (The component can be deleted by clicking the Remove icon in the top right corner of the component.)
  - MapsProperty
  - ImageManager
  - PropertyMediaOverview
  - Portals (non-US only)



> Note: Not all accounts will have the VisualForce components listed above, just delete the ones you do have.

- Next, scroll back to the top of the page and **click Save**.



- **Repeat that process for the Project Layout and Property Layout**, as well as any custom Page Layouts if you have them.

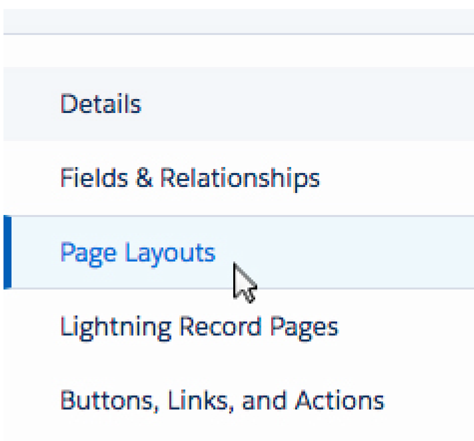
4c: Configure Inquiry Object (Formerly Request Object)

In this section we will rename Requests to Inquiries and lay the groundwork for Inquiry Matching.

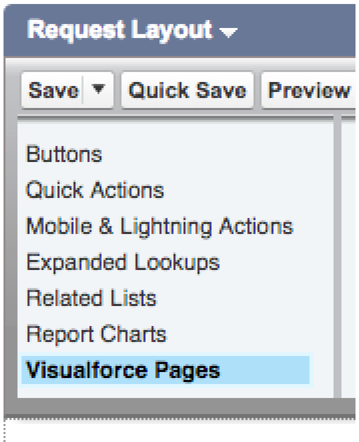
- **Click Object Manager** at the top of the screen.

- Scroll down the list of Objects and **click Request**.

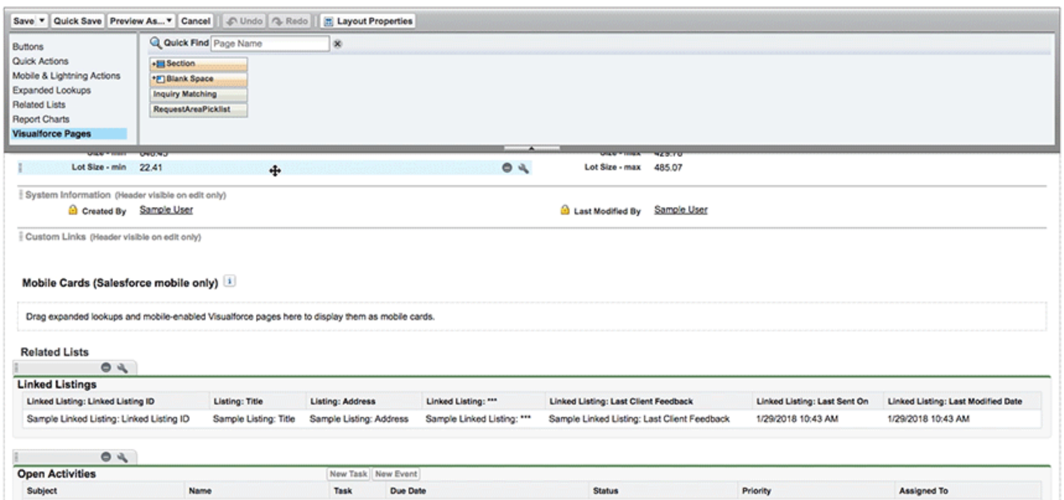
- On the left side of the screen, **click Page Layouts**.



- **Click Request Layout** under Page Layouts.
- At the top of the page, **click Visualforce Pages** in the grey box.

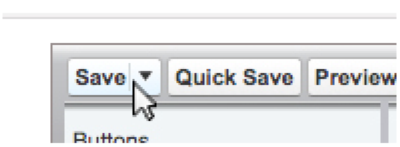


- **Drag 'Inquiry Matching'** from the grey box at the top of the screen, **down to the Mobile Cards area**.



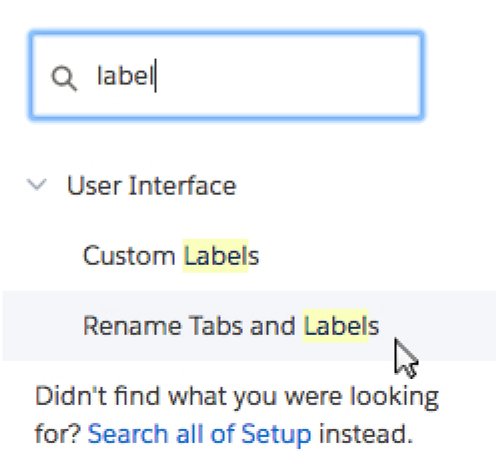
Click here to view the animation above in a web browser.

- Scroll to the top of the page **and click Save**.

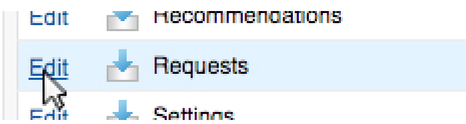


- **Click Home** at the top of the screen to return to Setup.

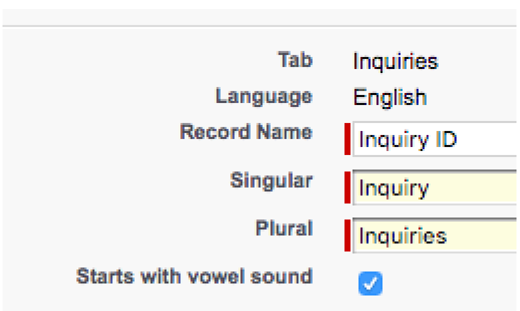
- **Click Rename Tabs and Labels** underneath User Interface on the left side of the screen.



- Scroll down and **click Edit** next to Requests (this will open a new window.)



- **Rename Requests** based on the image below.



- **Click Save**.

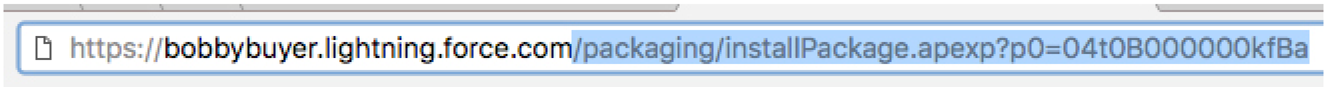
Section 5: Install the Newest Versions of Propertybase

Now that our installation is prepared and ready - it's time to update to the newest versions of Propertybase! First we need to install Propertybase version 1.414. This was the first version of Propertybase built for Lightning and will lay the foundation for future updates.

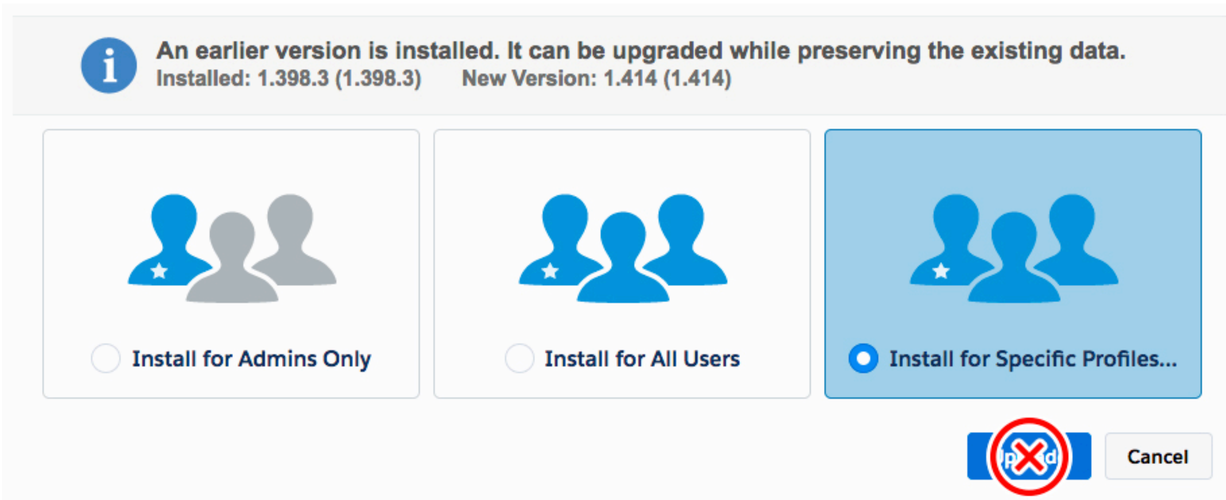
5a: Install Propertybase Version 1.414

```
/packaging/installPackage.apexp?p0=04t0B000000kfBa
```

- **Copy the text link above** and then **paste it following the .com in your Propertybase URL**. The screenshot below shows what the complete URL should look like.

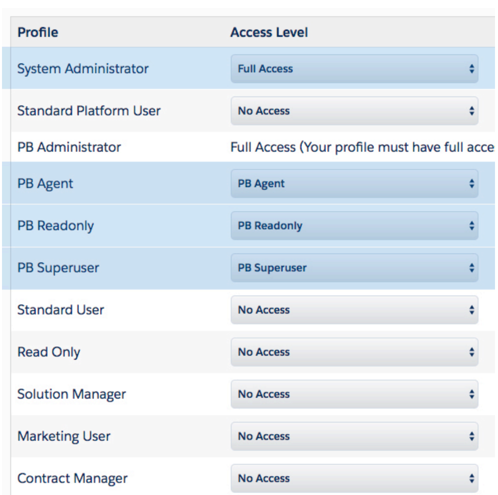


- **Hit Enter** on your keyboard to follow the URL.
- On the following screen **select Install for Specific Profiles**. DO NOT click Upgrade yet.



- Scroll down the page and **assign access levels according to the screenshot below**.

Note: If you have created any custom profiles, set the access level of those profiles based on the profile is was created from. For example: If you cloned the PB Agent profile and named it “Rental Agent”, that profile would receive “PB Agent” access level.



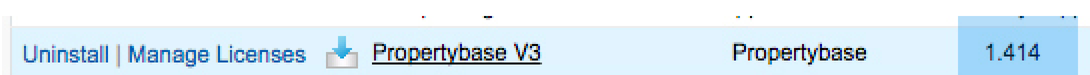
Profile	Access Level
System Administrator	Full Access
Standard Platform User	No Access
PB Administrator	Full Access (Your profile must have full acce
PB Agent	PB Agent
PB Readonly	PB Readonly
PB Superuser	PB Superuser
Standard User	No Access
Read Only	No Access
Solution Manager	No Access
Marketing User	No Access
Contract Manager	No Access

- Once you have set the proper access levels, scroll up and **click Upgrade**.

The upgrade process will take a few minutes. You may receive a message that says “This app is taking a long time to upgrade.” Not to worry, simply watch your email inbox for an "upgrade successful" email. Once received, continue with the steps below.

- After waiting a few minutes, **click Done**.

You should now see Propertybase V3 (1.414) listed in your Installed Packages screen. If you don’t, wait a few more minutes and refresh the page.



Note: If you receive an error message when trying to update to 1.414, try the troubleshooting steps located at the end of this document. (Appendix section A1). Once complete, continue to the next section of this document (4b).

5b: Install the Latest Version of Propertybase

- **Install the latest version of Propertybase** at update.propertybase.com.

Click here for instructions on updating Propertybase.

> Note: If you are performing a sandbox migration, click the "Check via Salesforce Sandbox" button on update.propertybase.com.

> Note: If you receive a notification about approving third-party access when installing Propertybase, you can safely check "Yes, grant access to these third-party web sites."

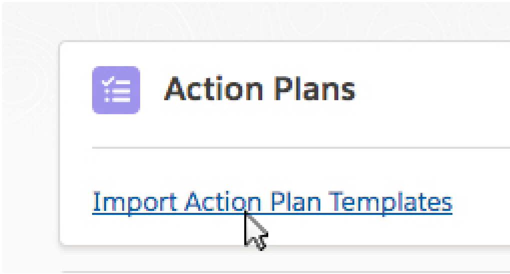
Once you've updated to the latest version, you should see that reflected in your Installed Packages screen. It not, wait a few more minutes and refresh the page.

5c: Import Lightning Templates

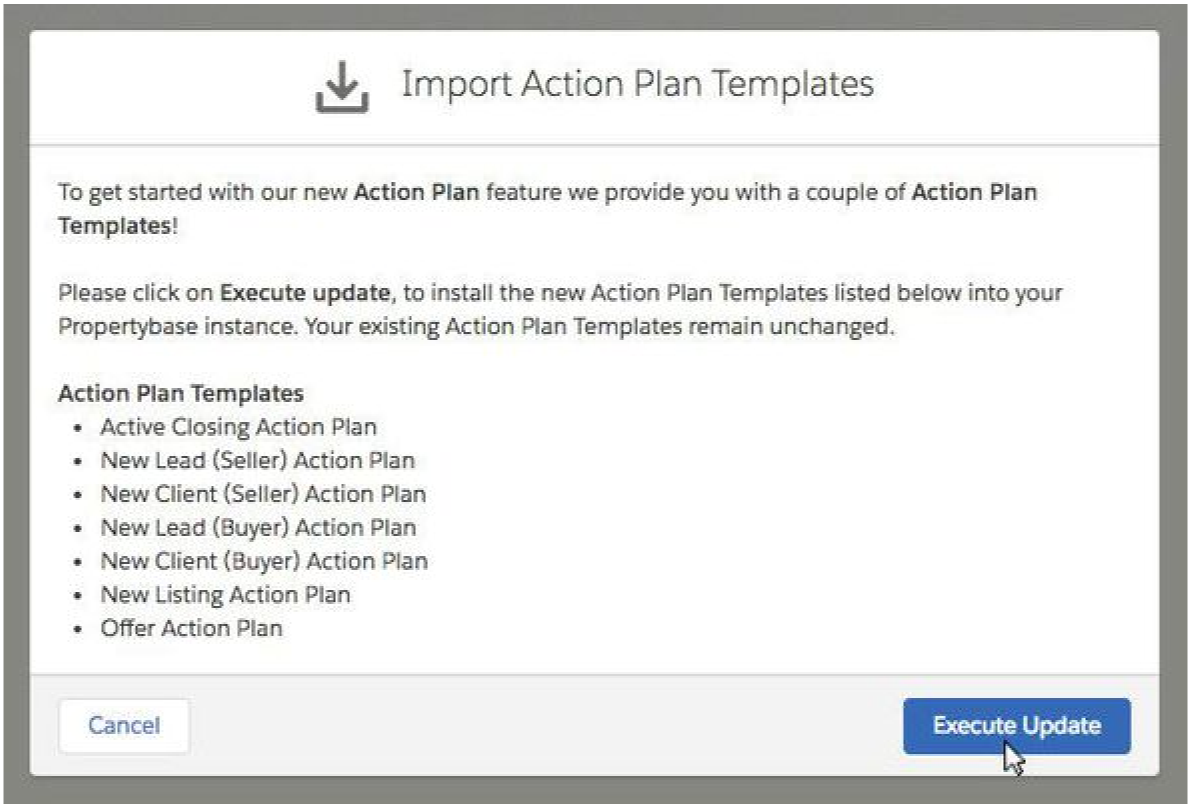
Next let's import all new action plan, listing, drip campaign and expose templates that were introduced in Lightning.

- **Return to** update.propertybase.com.
- **Click the Resources tab** at the top of the screen.

- **Click the import link** under Action Plans.



- **Click Execute Update** in the lower right corner of the modal window.

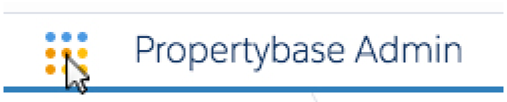


- On the following screen, **click Ok**.
- **Return to the Resources Tab** and **repeat the same steps for all other resources** (Listing Templates, Drip Campaign Templates and All PDF Templates.)

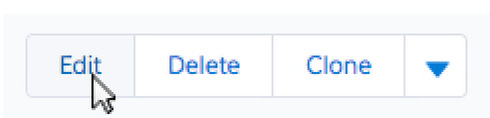
5d: Update Quicksend Branding

Now that we've imported new templates, we need to update the branded Quicksend template with your companies logo.

- **Click the app launcher** in the top left of the page.



- **Click Templates**.
- **Click Branded Template**.
- **Click Edit** in the top right corner of the screen. (If you don't see Edit, click the drop down arrow for more actions.)



- Next **copy the HTML** from this screen and **paste it** into your code editor of choice.

Your browser does not support the HTML5 video element

Click here to view the video above in your browser.

- Locate where says “Company logo settings”.

```
<meta name="format-detection" content="telephone=no">
<!-- Company logo settings -->
{% assign layout_logo = 'https://s3.amazonaws.com/propertybase-resources/
marketing-templates/logo.png' %} <!-- url to logo image -->
{% assign layout_logo_width = 210 %} <!-- number -->
{% assign layout_logo_height = 36 %} <!-- number -->
{% assign layout_logo_position = 'center' %} <!-- one of ['left', 'center',
'right'] -->
<!-- Style settings -->
```

- **Replace the code** between the single quotes with the URL to your company logo.

Note: Recommended image size for logo is 210x36.

- **Copy the updated HTML** and **paste it** back into Propertybase.
- **Click Save**.

Nice work! So far you have successfully updated your Propertybase account to Lightning, removed old configurations, installed the latest versions of Propertybase, imported new resources and updated template branding.

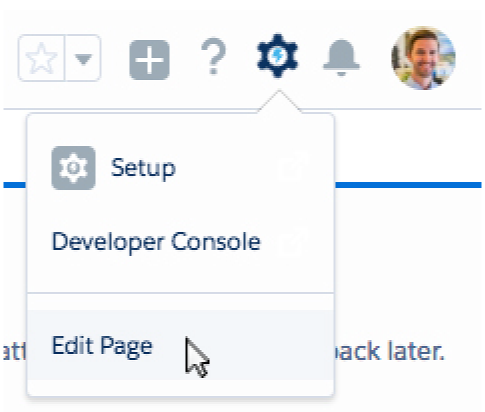
In the next part of the migration process, we will modify the way Propertybase looks and feels and customize the way it functions.

Section 6: Configure Homepage

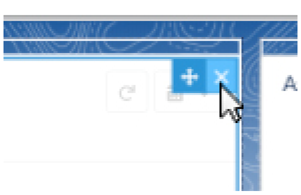
In this section we will edit the homepage and modify the components that appear each time you log into Propertybase.

6a: Configure Homepage

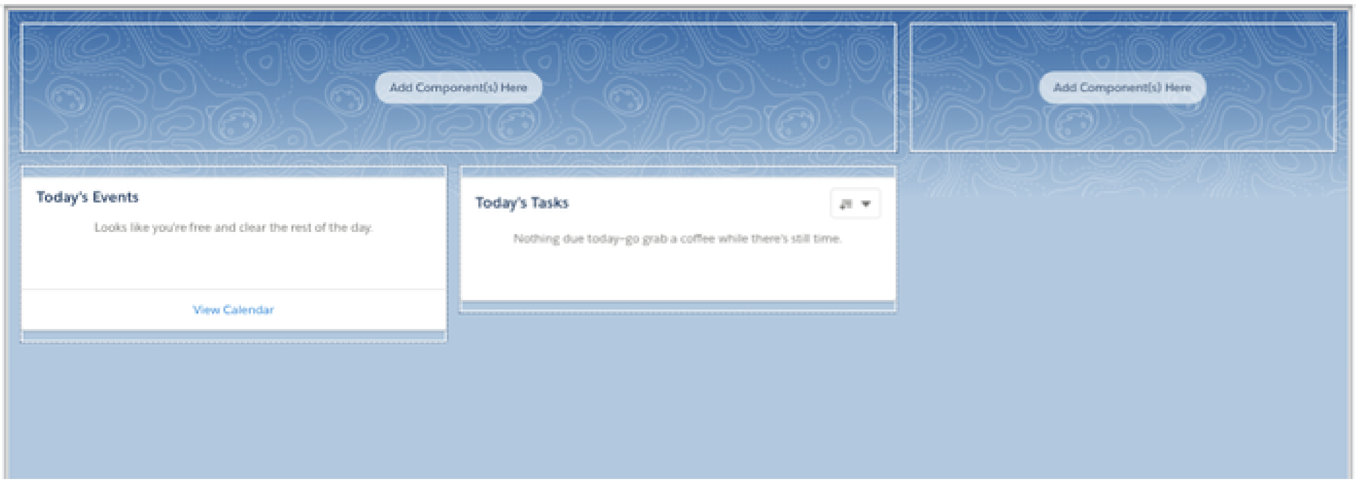
- **Click the gear icon** in the top right menu and then **click Edit Page.**



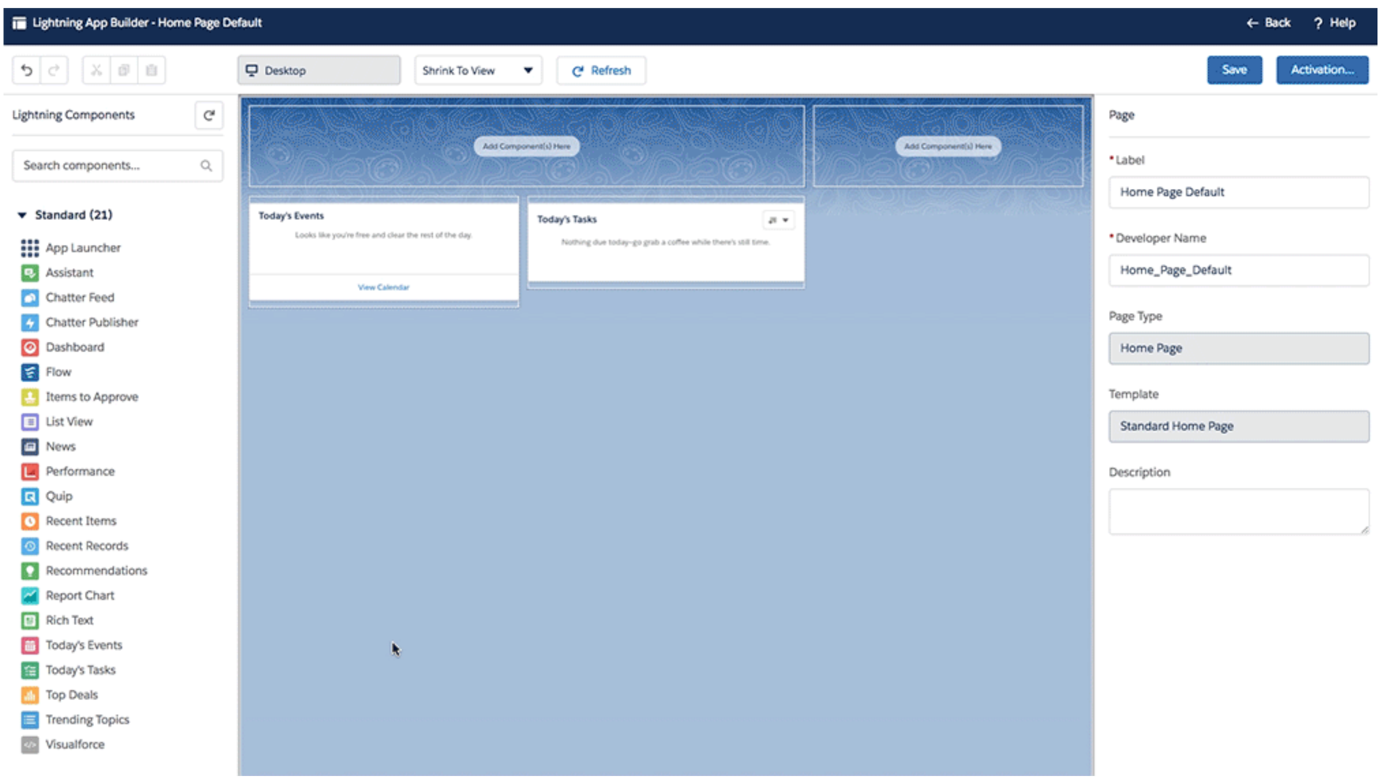
Next we need to remove all unnecessary components from the homepage. Page components can be removed by clicking the small blue "X" in the top right corner of the component. (See image below.)



- **Remove all components (other than Events and Tasks)** so that your page looks like the image below.

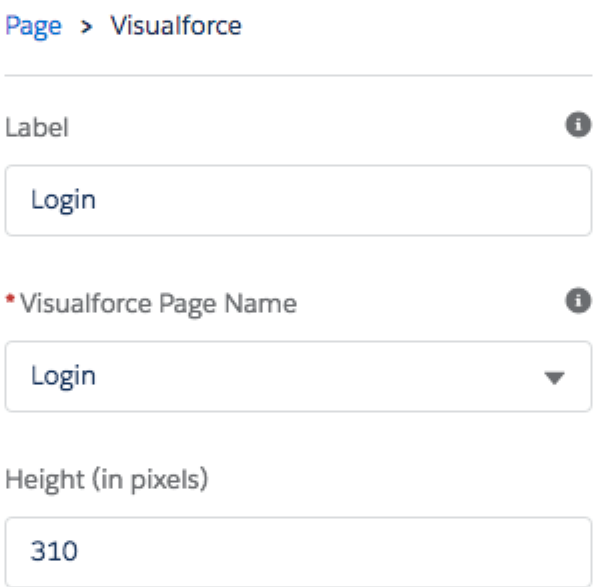


- On the left side of the screen, underneath the Standard list, **click and drag Visualforce** to the top right of the Homepage screen.



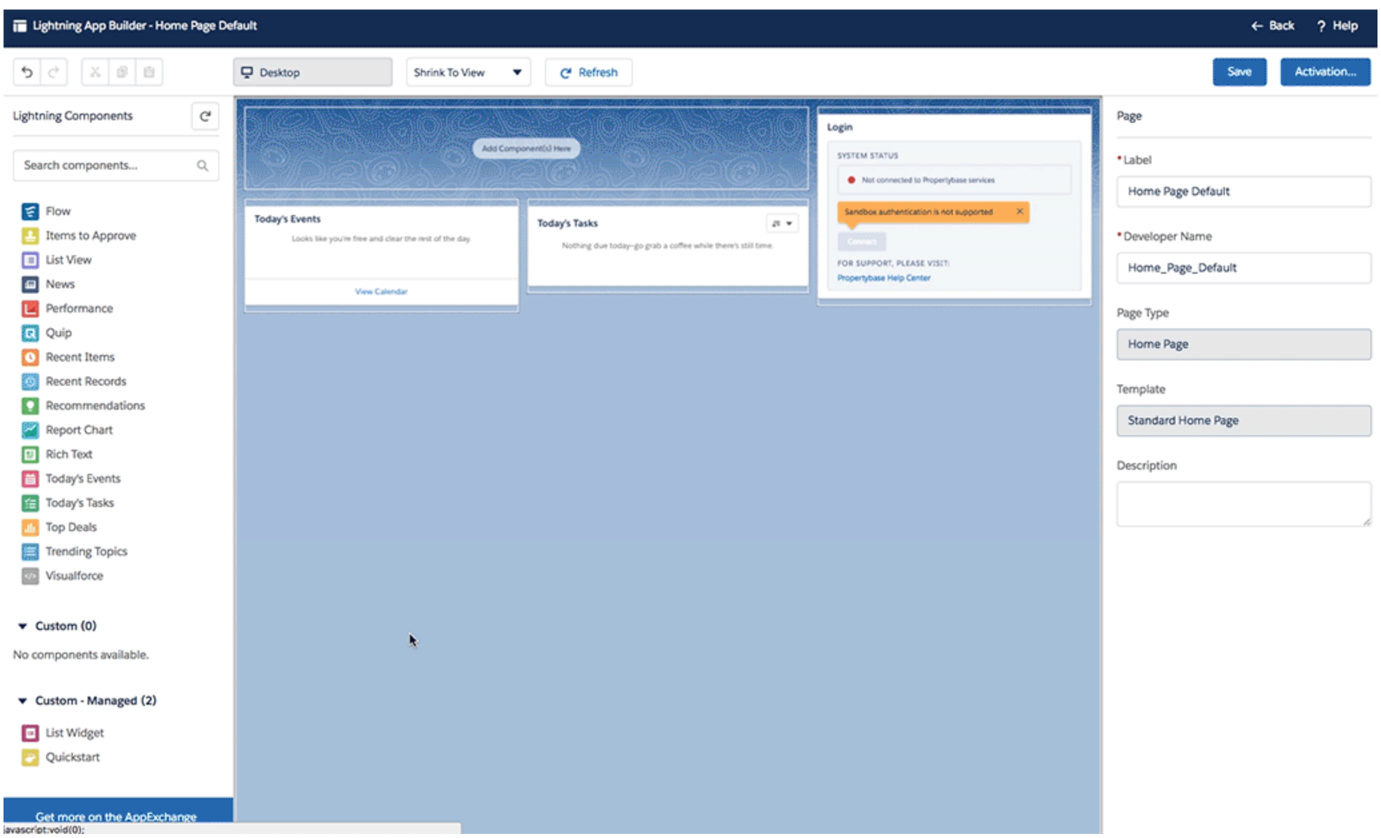
Click here to view the animation above in a web browser.

- Inside the right column, **enter the values for Label, Visualforce Page Name and Height** as they appear in the screenshot below.



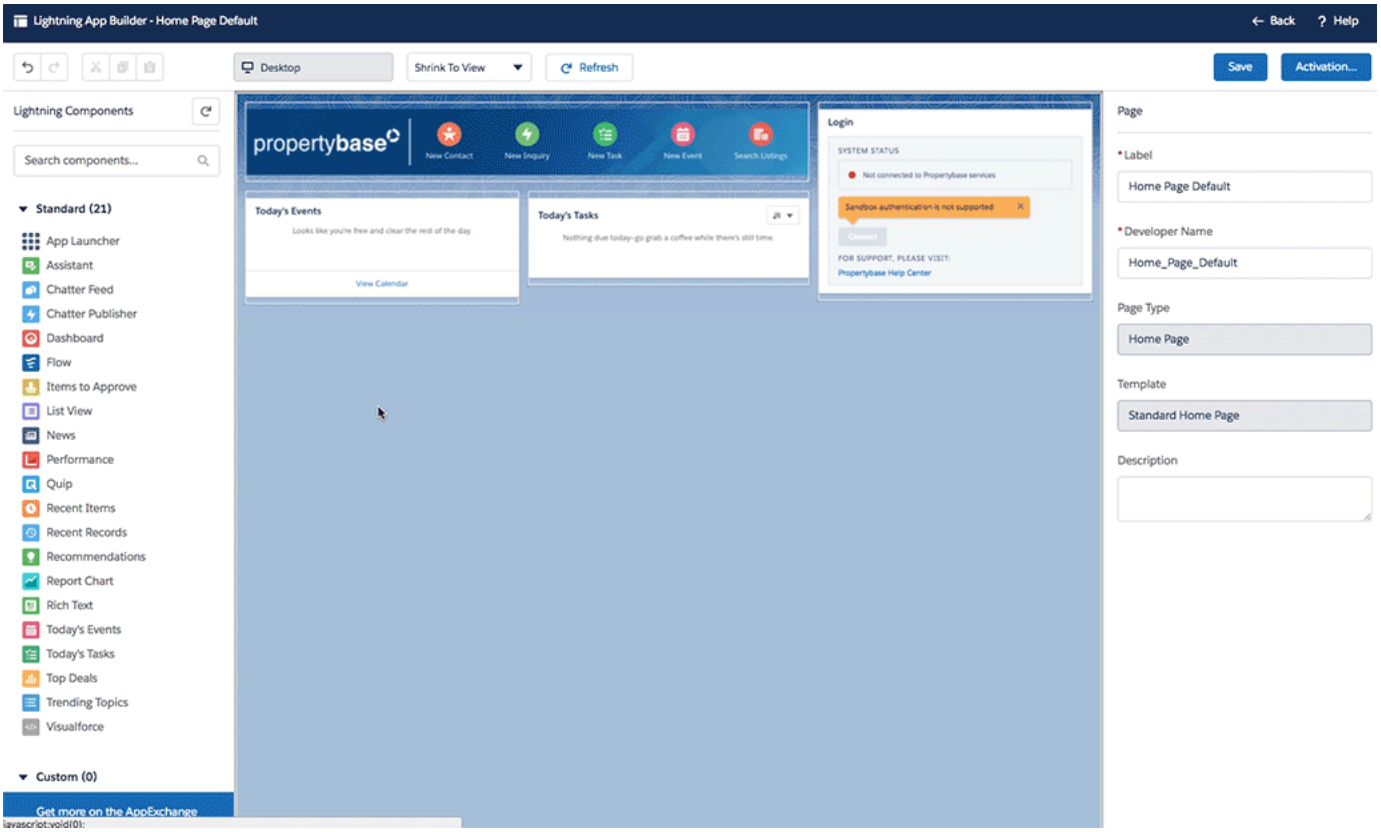
Note: The login box will show a "Sandbox authentication is not supported" error message. You can safely ignore this. However, if you would like to resolve this message, please refere to this article.

- Next **drag the Quickstart component** (from the Custom list) to the top of the screen.



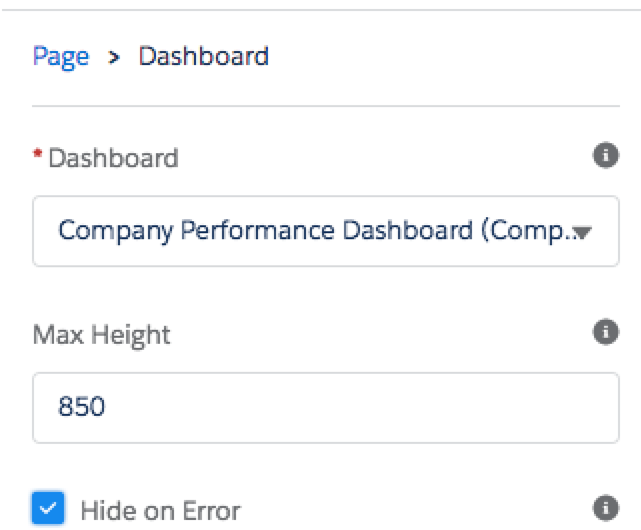
Click here to view the animation above in a web browser.

- Next **drag the Dashboard compontent** to the area shown in the image below.

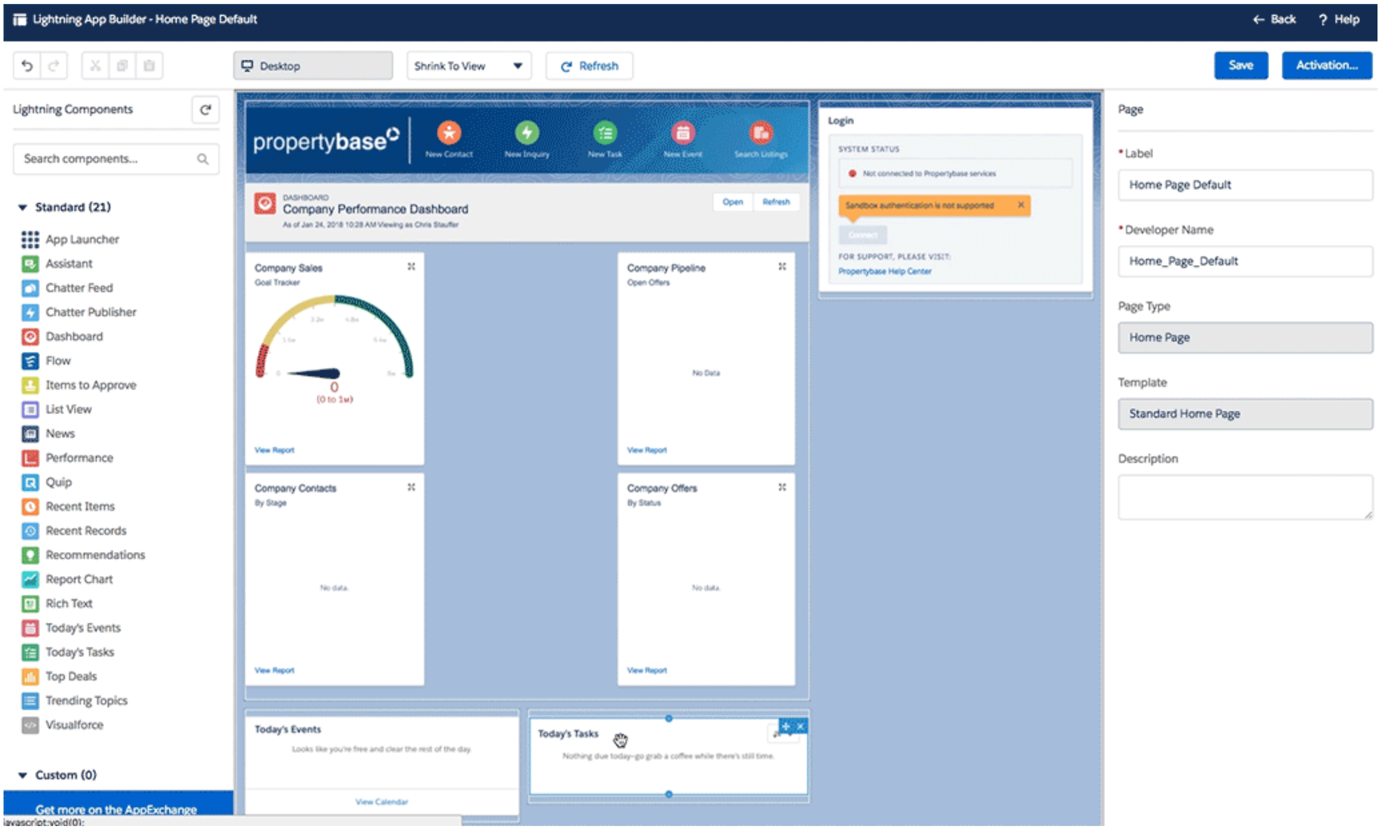


Click here to view the animation above in a web browser.

- Inside the right column, **enter the values for Dashboard and Max Height** as they appear in the screenshot below.

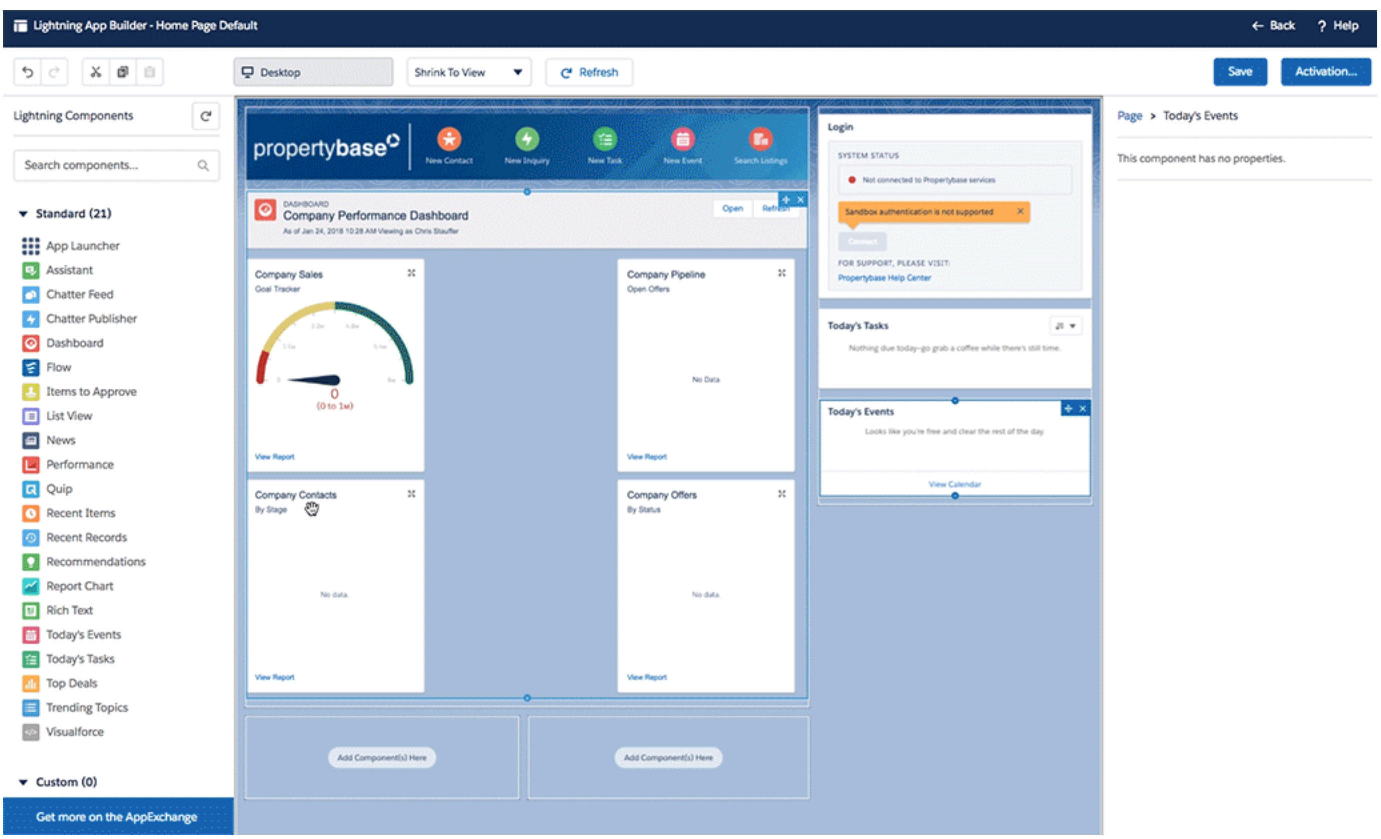


- Next **drag Tasks and Events** to the area shown in the image below.



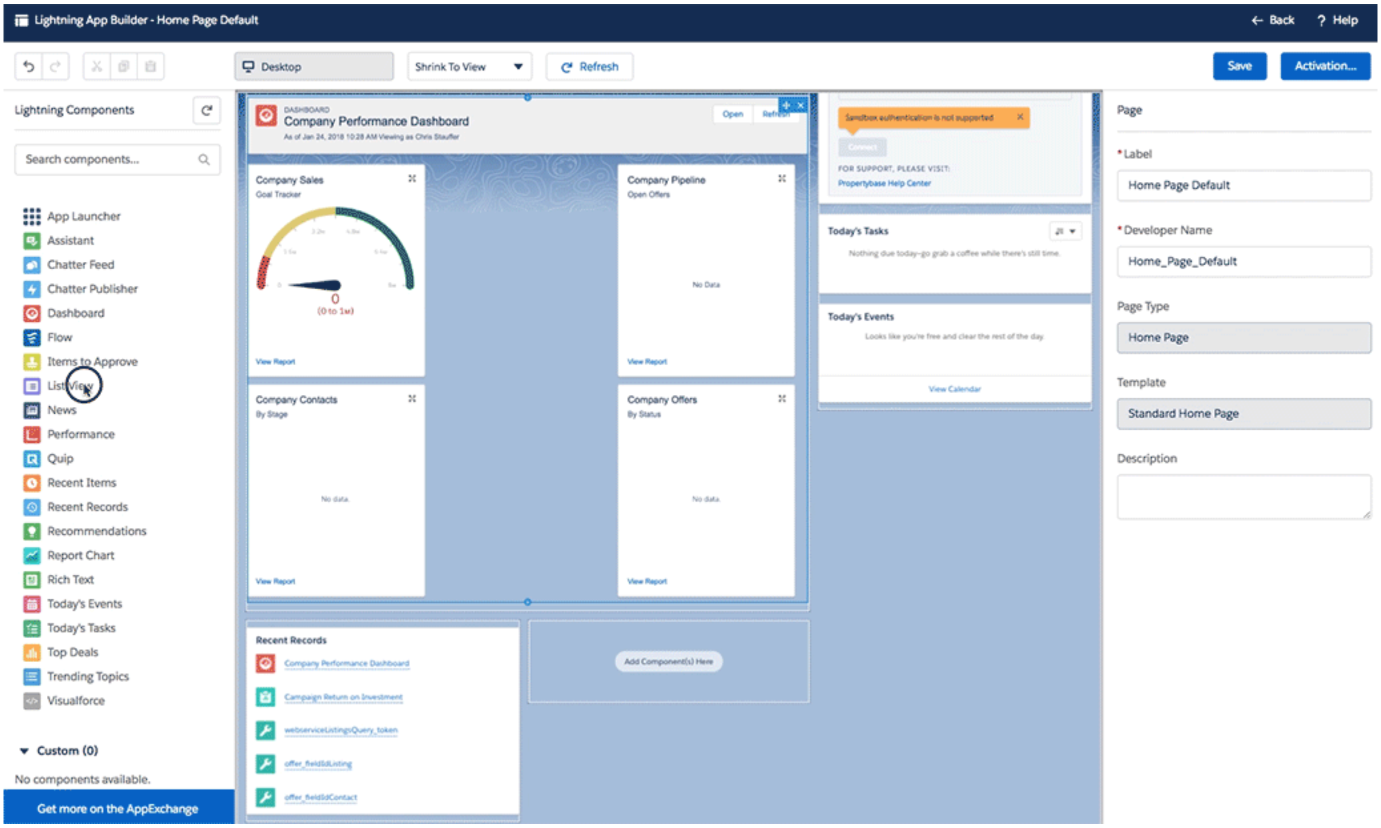
Click here to view the animation above in a web browser.

- Next **drag the Recent Records component** to the area shown in the image below.



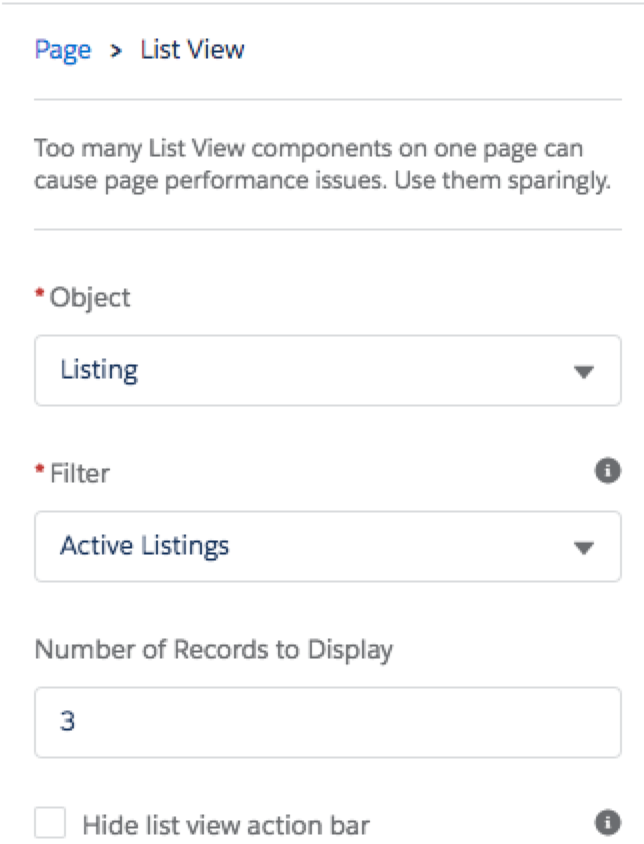
Click here to view the animation above in a web browser.

- Next **drag the List View component** to the area shown in the image below.

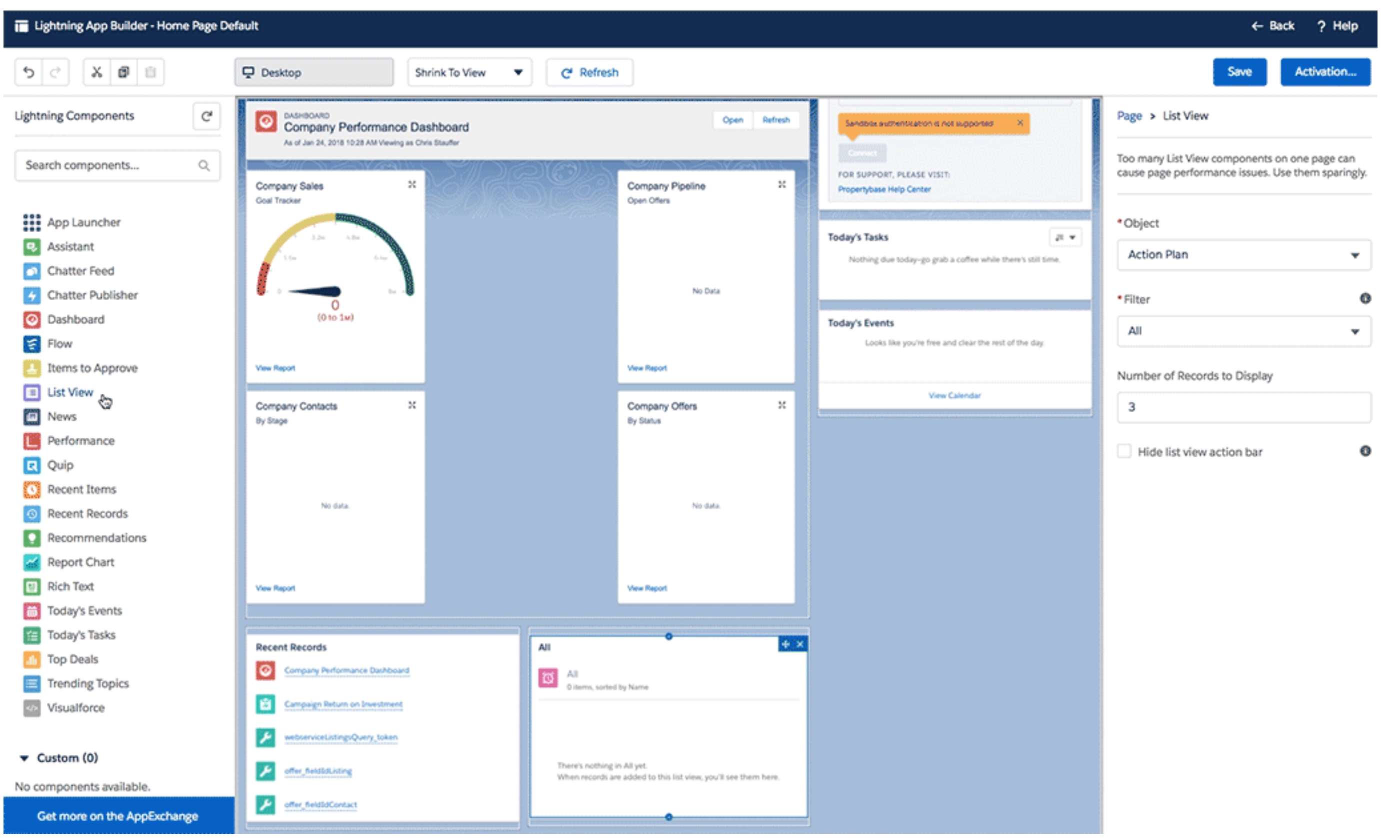


Click here to view the animation above in a web browser.

- Inside the right column, **enter the values for Object, Filter and Number of Records to Display** as they appear in the screenshot below.

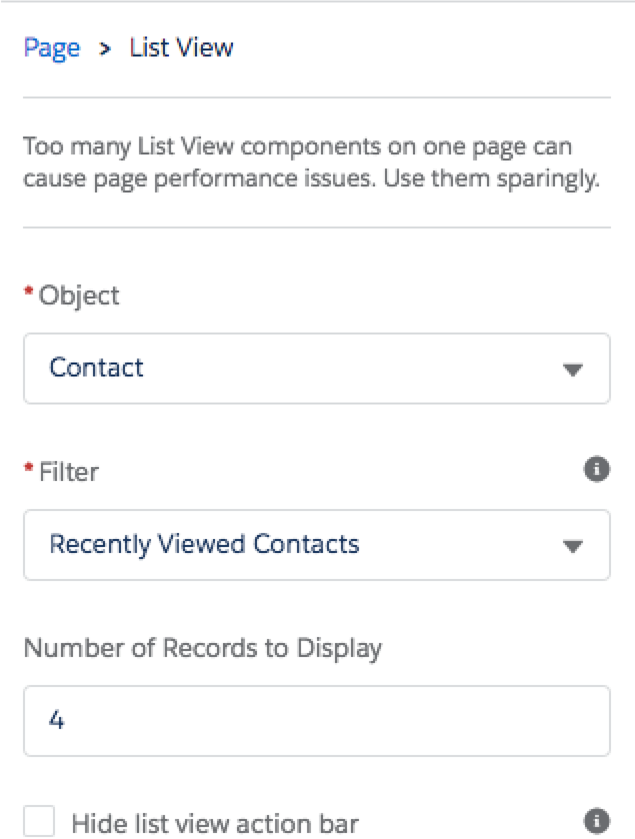


- Next **drag a second List View compontent** to the area shown in the image below.



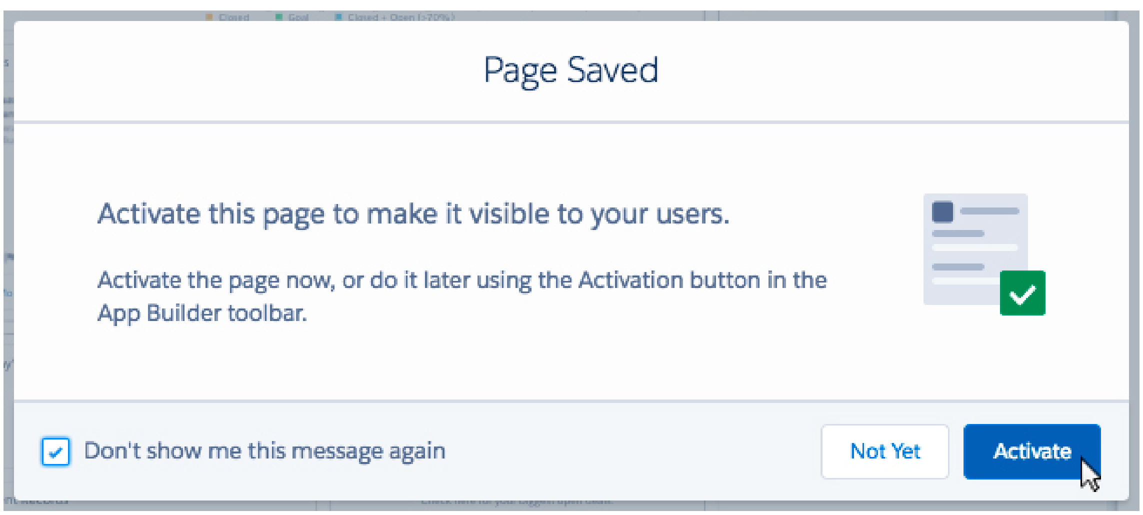
Click here to view the animation above in a web browser.

- Inside the right column, **enter the values for Object, Filter and Number of Records to Display** as they appear in the screenshot below.

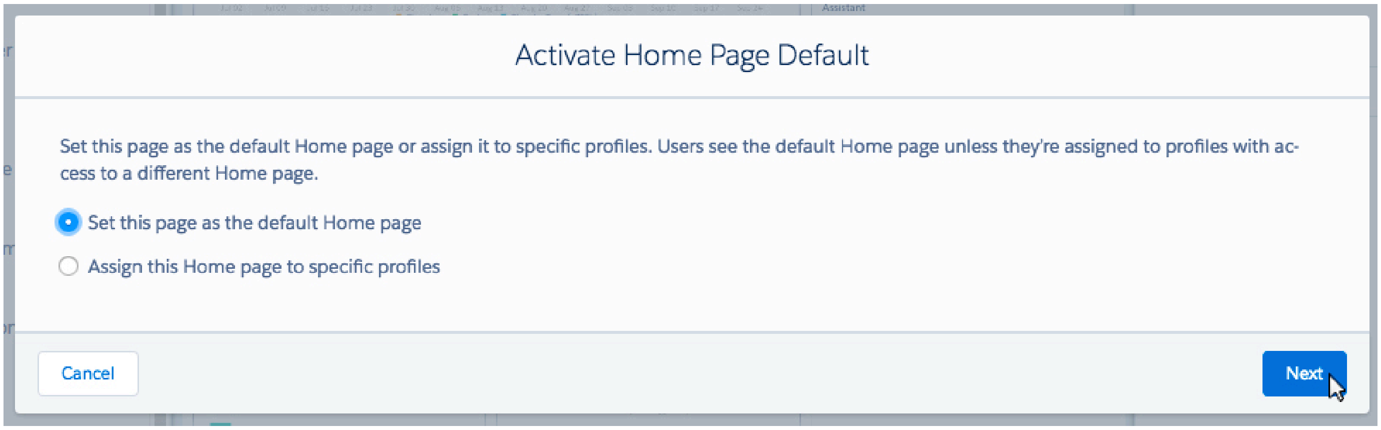


- **Click Save at the top of the page.**

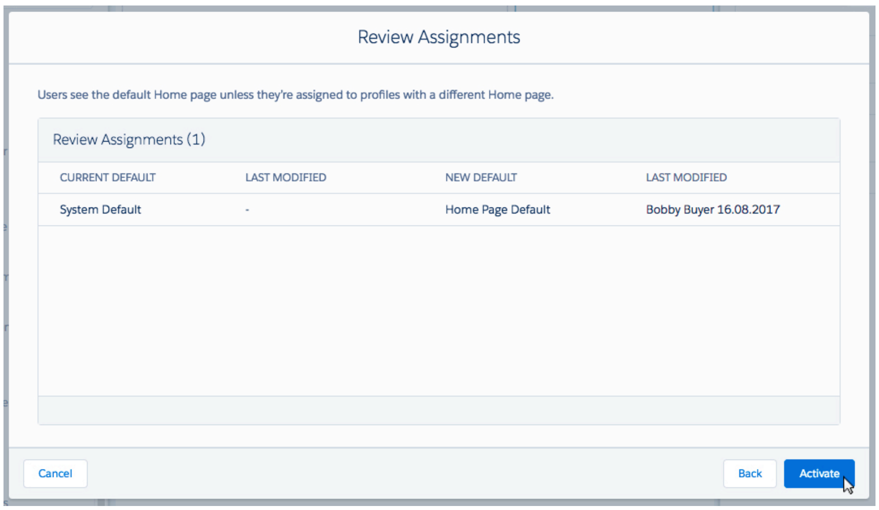
- When prompted, **check Don't show me this message again** and then **click Activate**.



- When prompted, **click Next** when asked to Activate Home Page Default.



- Finally, **click Activate** when prompted to Review Assignments.



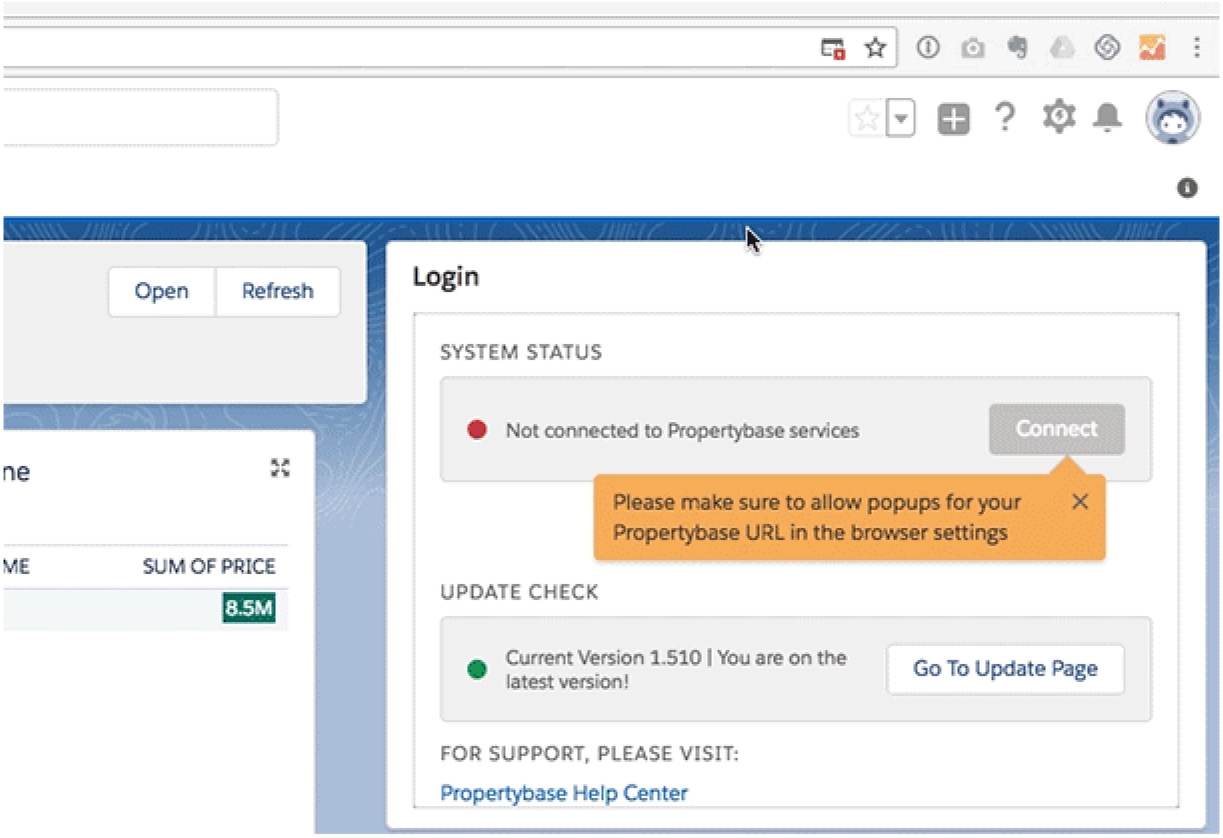
- **Click Save at the top of the page.**

- Lastly, **click Back** at the top of the page to return to the Home Page.

6b: Allow Browser Popups

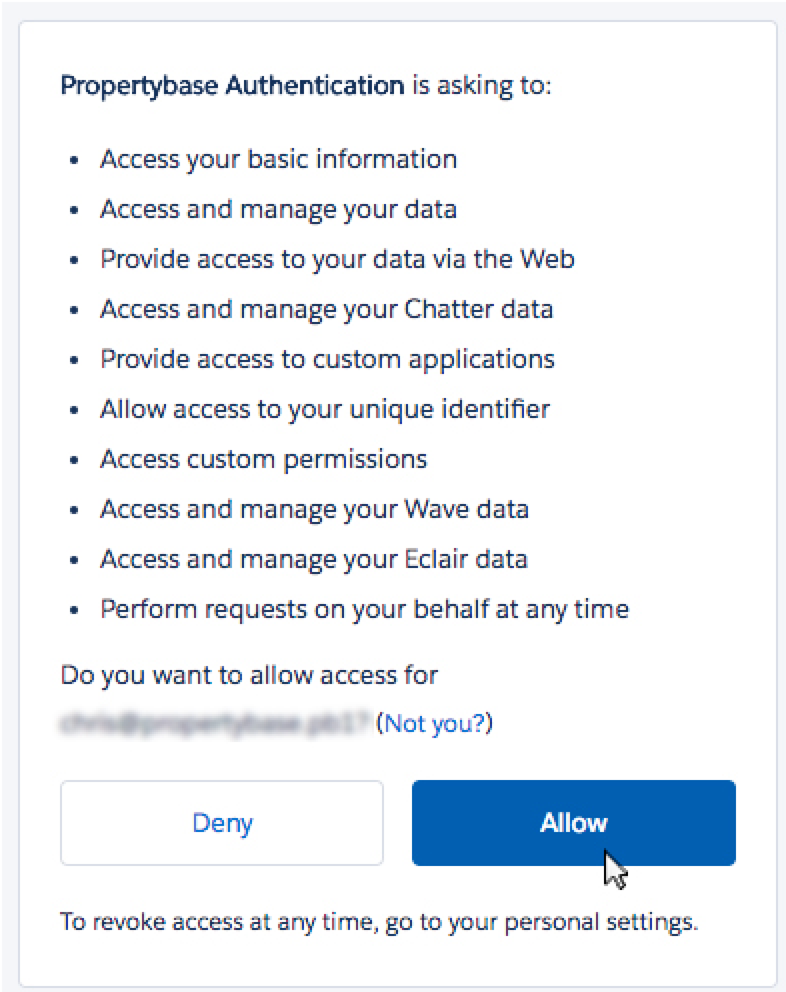
After clicking the "Back" button you should now be on the homepage. If you don't see the changes made in the previous section, simply refresh and they should appear. Once the new homepage loads for the first time, **you must allow popups**. Follow the steps below to do so.

- Using the animation below as a reference, **allow Propertybase access to browser popups**.

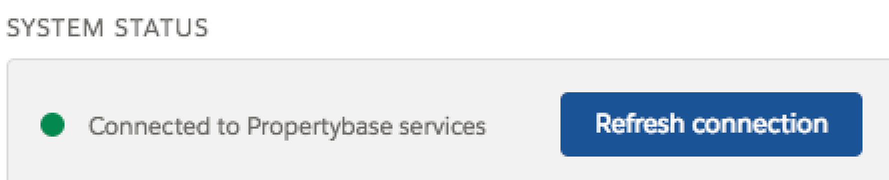


Click here to view the animation above in a web browser.

- Next, **click Allow** in the popup displayed.



Once you have allowed popups and permissions have been granted, your login box should look like the image below.

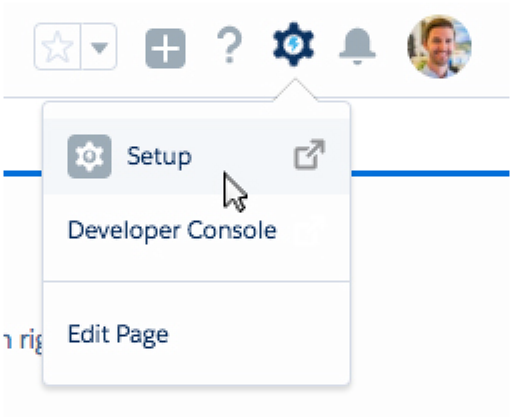


Section 7: Upgrade Classic Apps, Set Visibility and More

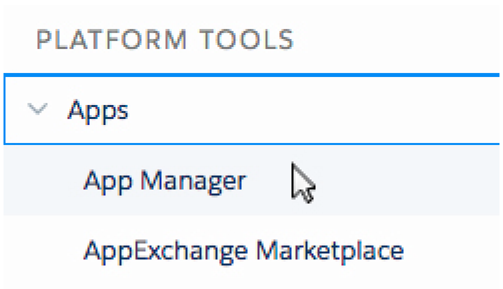
Next we need to upgrade Classic Propertybase apps to Lightning, make sure they are visible in the right profiles, make sure any remaining deprecated apps are removed and update settings for finding duplicate records.

7a: Upgrade Classic Apps to Lightning

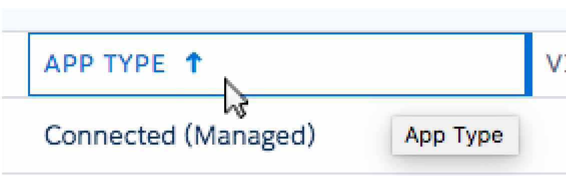
- From Home, **click the gear icon** in the top right of the screen, then **click Setup**.



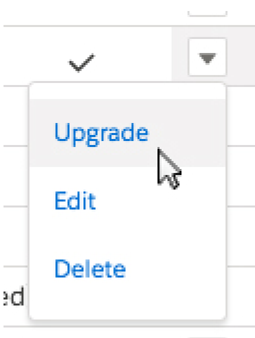
- Next, **click App Manager** under Apps in the Quick Find menu.



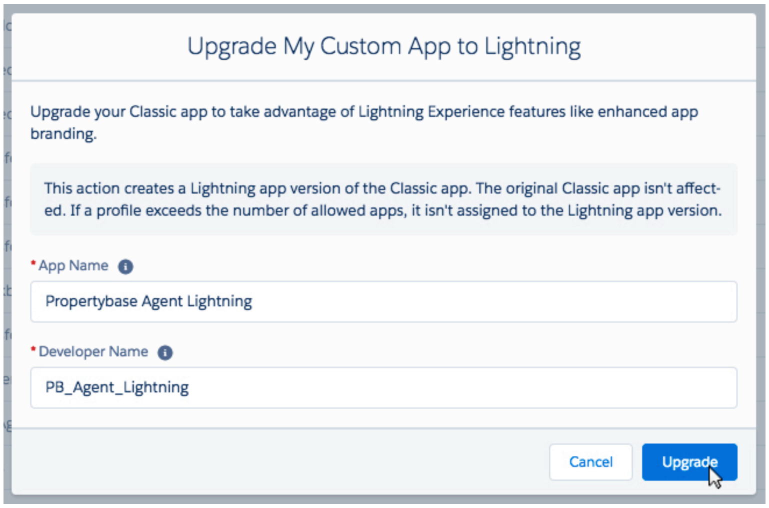
- **Sort by App Type.**



- Scroll down until you see App Type: Classic.
- **Click the far right arrow** for both **Propertybase Agent** and **Propertybase Admin**. **Click Upgrade**.

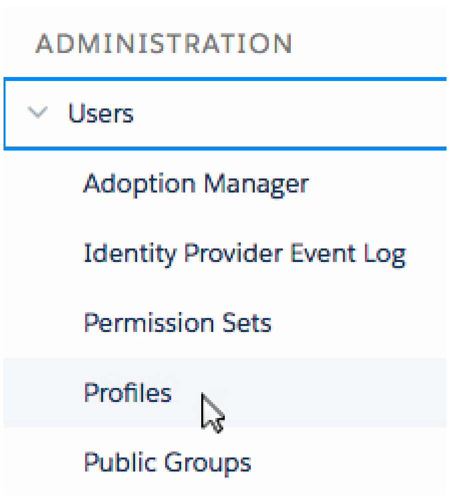


- When prompted to Upgrade My Custom App to Lightning, **click Upgrade**.

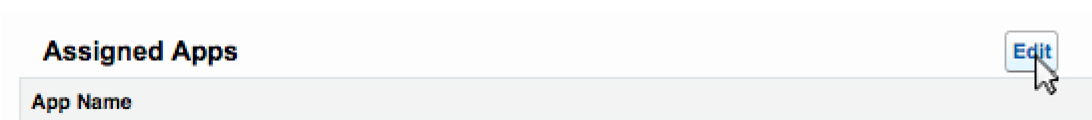


7b: Configure Application Profile Visibility

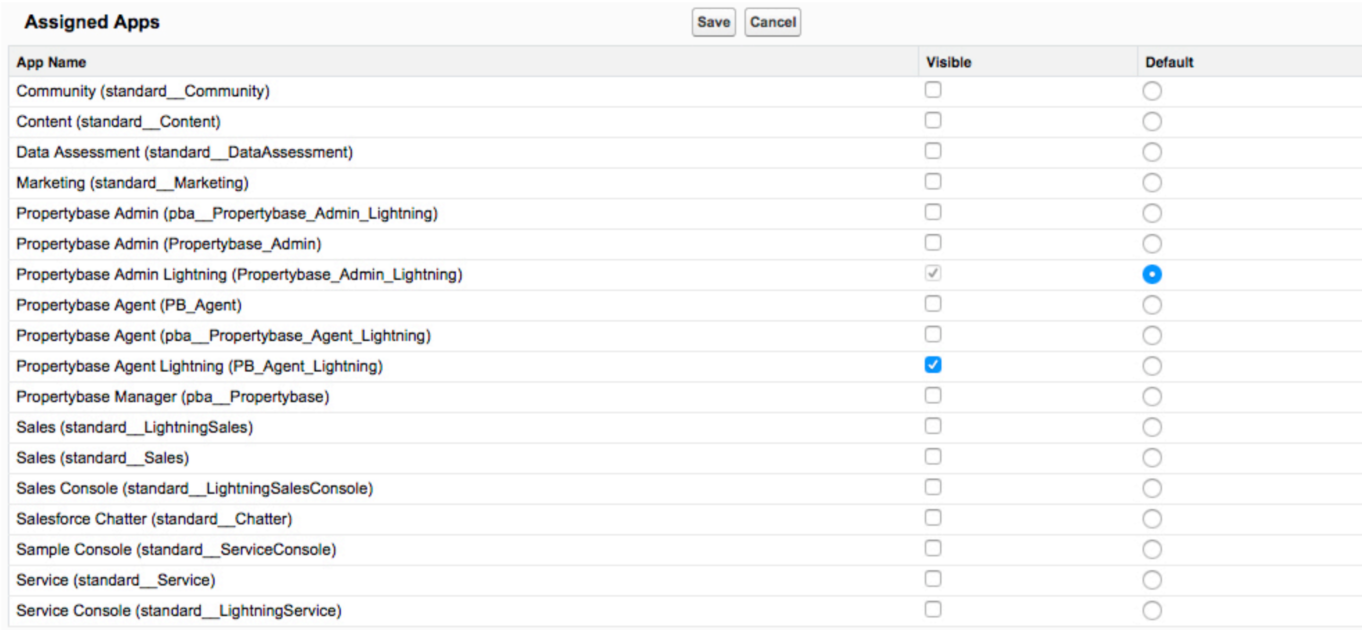
- On the left side of the screen, in the Quick Find menu, **click Profiles** underneath Users.



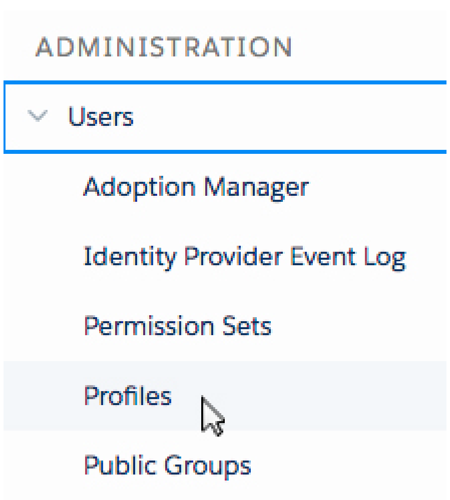
- **Click on PB Administrator.**
- Scroll down and **click Assigned Apps**.
- To the right of the Assigned Apps header, **click Edit**.



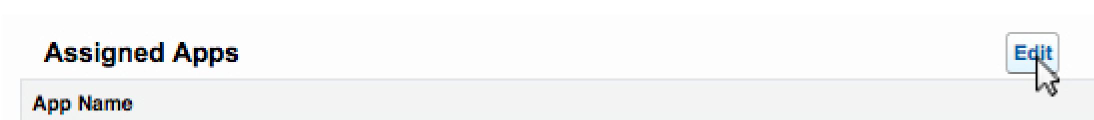
- **Assign visibility** to match the image below.



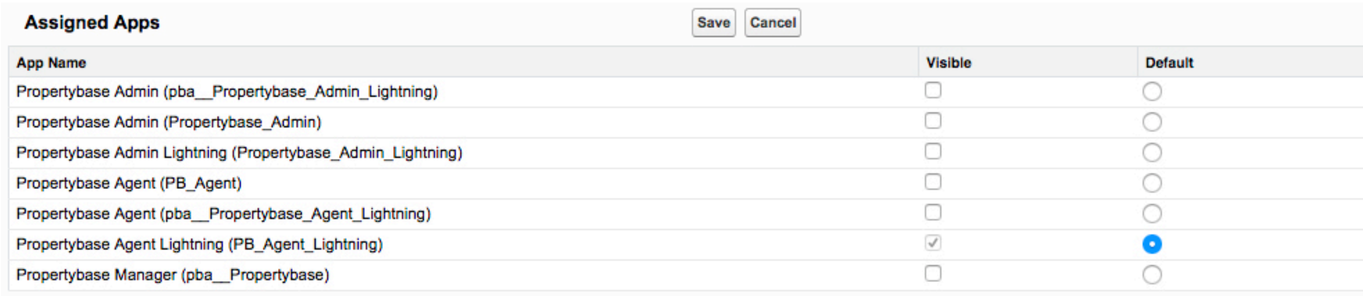
- **Click Save**.
- **Return to the main Profiles screen**.



- **Click PB Agent.**
- Scroll down and **click Assigned Apps**.
- To the right of the Assigned Apps header, **click Edit**.



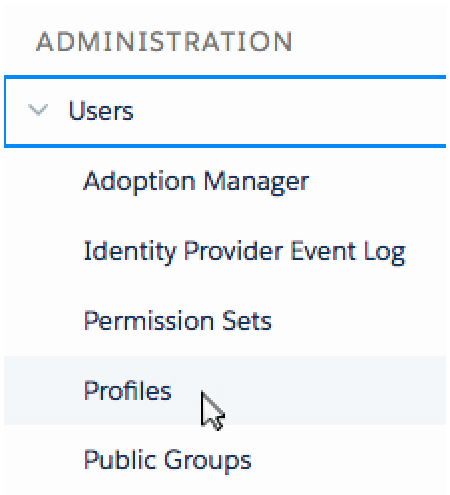
- **Assign visibility** to match the image below.



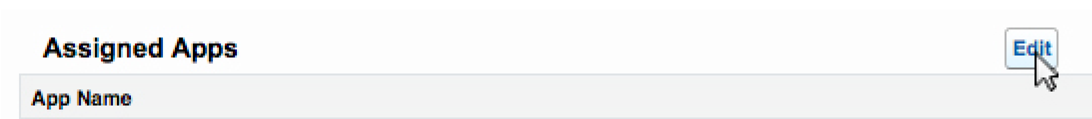
Assigned Apps [Save] [Cancel]

App Name	Visible	Default
Propertybase Admin (pba__Propertybase_Admin_Lightning)	☐	○
Propertybase Admin (Propertybase_Admin)	☐	○
Propertybase Admin Lightning (Propertybase_Admin_Lightning)	☐	○
Propertybase Agent (PB_Agent)	☐	○
Propertybase Agent (pba__Propertybase_Agent_Lightning)	☐	○
Propertybase Agent Lightning (PB_Agent_Lightning)	☑	●
Propertybase Manager (pba__Propertybase)	☐	○

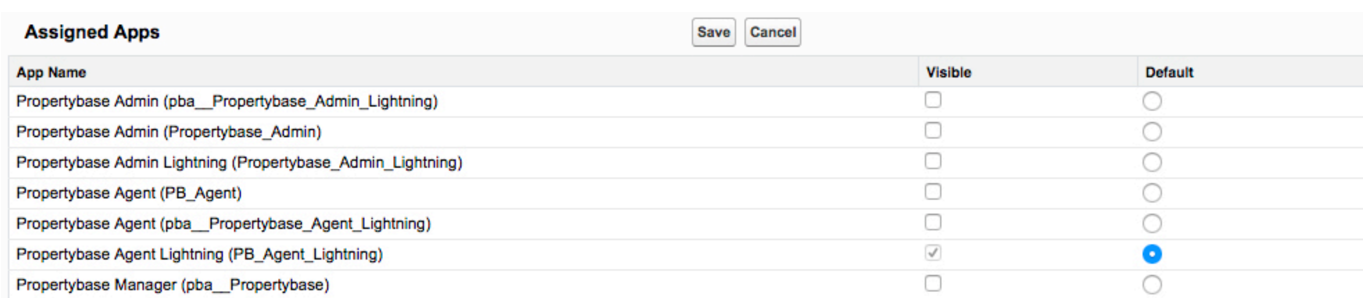
- **Click Save**.
- **Return to the main Profiles screen**.



- **Click PB Readonly.**
- Scroll down and **click Assigned Apps**.
- To the right of the Assigned Apps header, **click Edit**.



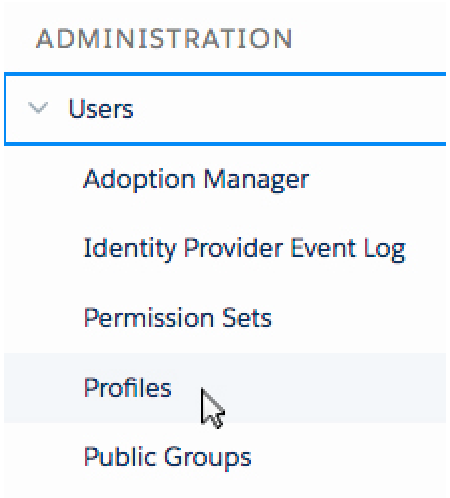
- **Assign visibility** to match the image below.



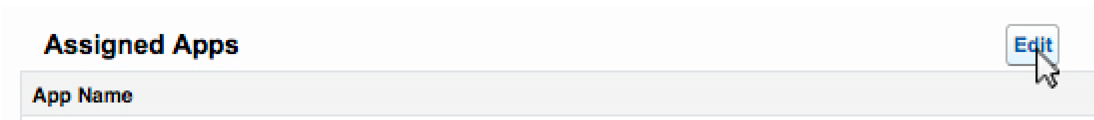
Assigned Apps [Save] [Cancel]

App Name	Visible	Default
Propertybase Admin (pba__Propertybase_Admin_Lightning)	☐	○
Propertybase Admin (Propertybase_Admin)	☐	○
Propertybase Admin Lightning (Propertybase_Admin_Lightning)	☐	○
Propertybase Agent (PB_Agent)	☐	○
Propertybase Agent (pba__Propertybase_Agent_Lightning)	☐	○
Propertybase Agent Lightning (PB_Agent_Lightning)	☑	●
Propertybase Manager (pba__Propertybase)	☐	○

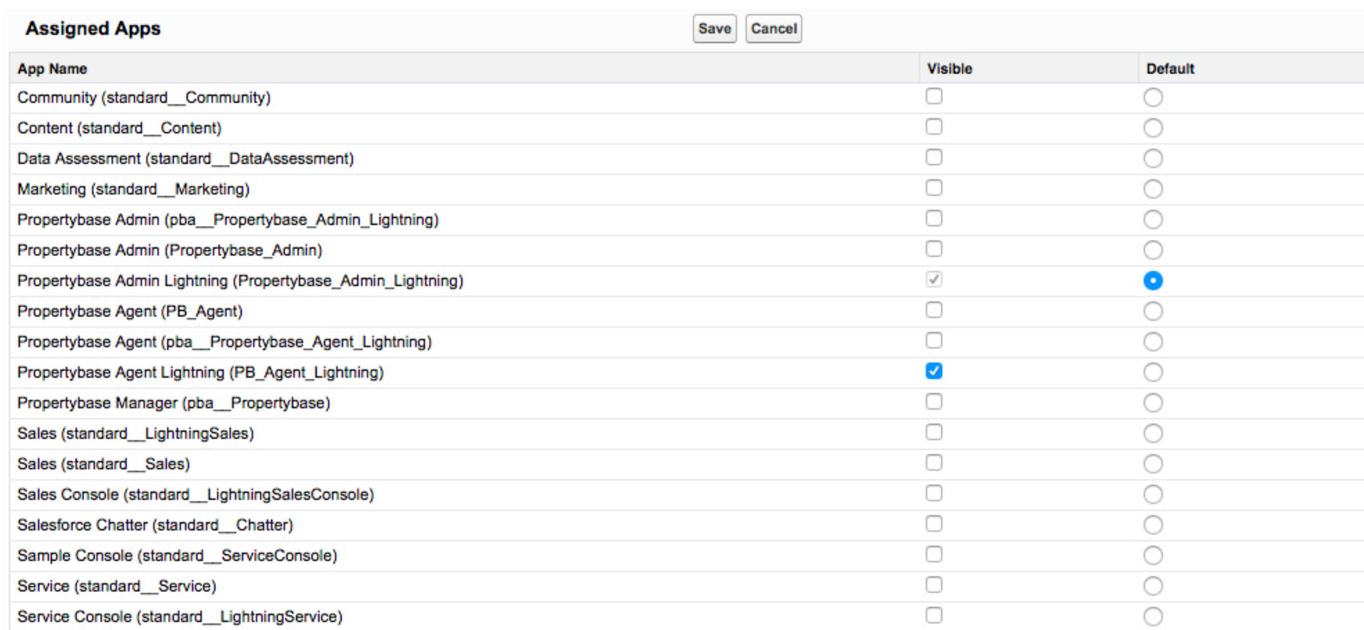
- **Click Save**.
- **Return to the main Profiles screen**.



- **Click PB Superuser.**
- Scroll down and **click Assigned Apps**.
- To the right of the Assigned Apps header, **click Edit**.



- **Assign visibility** to match the image below.

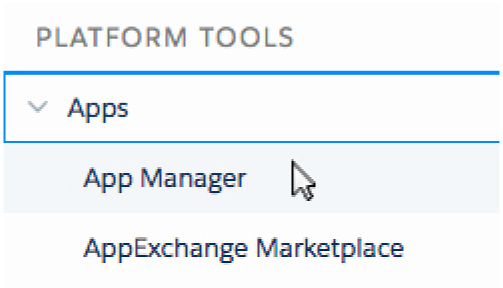


- **Click Save**.

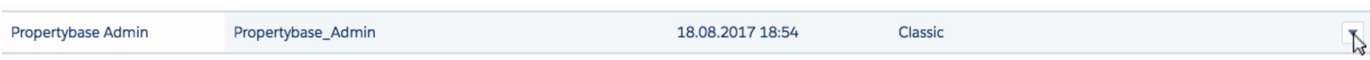
7c: Rename Propertybase Applications

Now that we have upgraded our Classic profiles to Lightning and assigned visibility to the right profiles, we can rename them to Lightning and Classic for easier reference in the future.

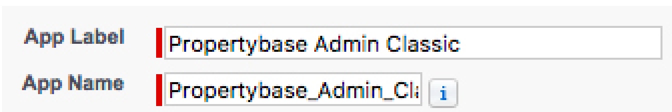
- On the left side of the screen, in the Quick Find menu, **click App Manager** underneath Apps.



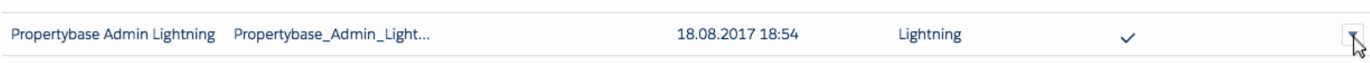
- Find Propertybase Admin (App Type Classic) and **click the arrow** on the far right, **select Edit**.



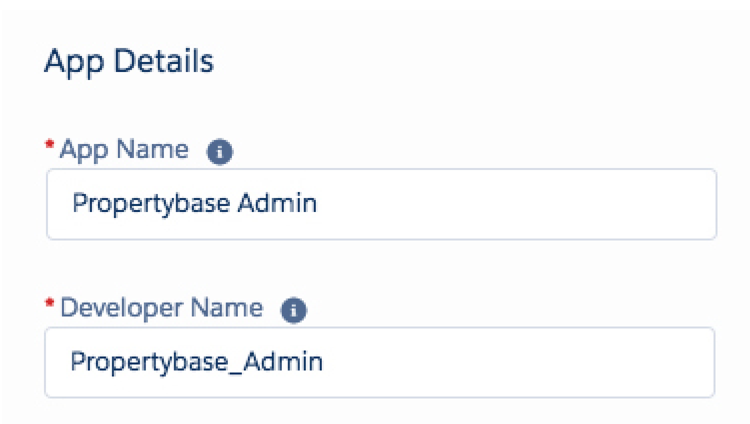
- **Add “Classic”** to the Label and **add “_Classic”** to the Name.



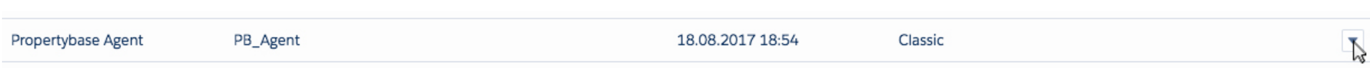
- **Click Save.**
- **Go back to App Manager.**
- Find Propertybase Admin (App Type - Lightning), and **click the arrow** on the far right, **select Edit**.



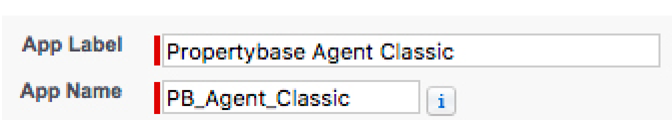
- **Remove “Lightning”** from the Label and **remove “_Lightning”** from the Name.



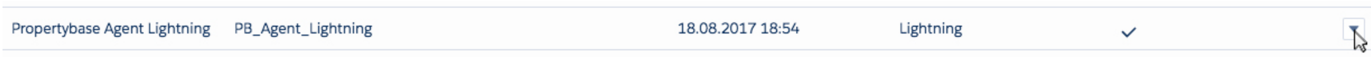
- **Click Save.**
- **Click Back.**
- **Go back to App Manager.**
- Find Propertybase Agent (App Type Classic) and **click the arrow** on the far right, **select Edit**.



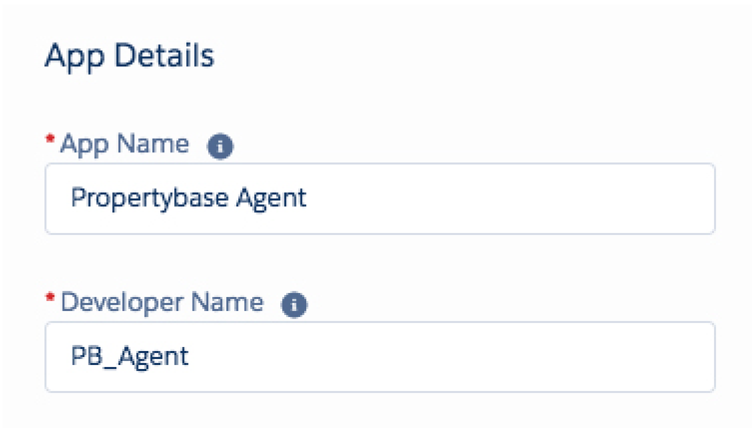
- **Add “Classic”** to the Label and **add “_Classic”** to the Name.



- **Click Save.**
- **Go back to App Manager.**
- Find Propertybase Agent (App Type - Lightning) and **click the arrow** on the far right, **select Edit**.



- **Remove "Lightning"** from the Label and **remove "_Lightning"** from the Name.

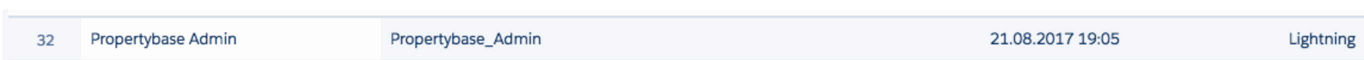


- **Click Save.**
- **Click Back**.

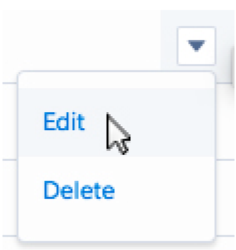
7d: Customize Branding and Configure Default Tabs

In this section we will cutomize your Lightning account with Propertybase branding (or your own) and configure default tabs for each profile. You should still be in the App Manager from the previous section, let's get started!

- **Find the Propertybase Admin** application (App Type - Lightning).



- **Click the far-right arrow** and **select Edit.**



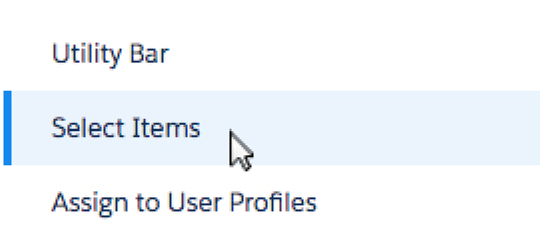
- **Download the Propertybase Circle Logo** here.

Note: To download the image: open the image in a new tab, right click the image and select Save Image As.

- **Click Upload** under Image.

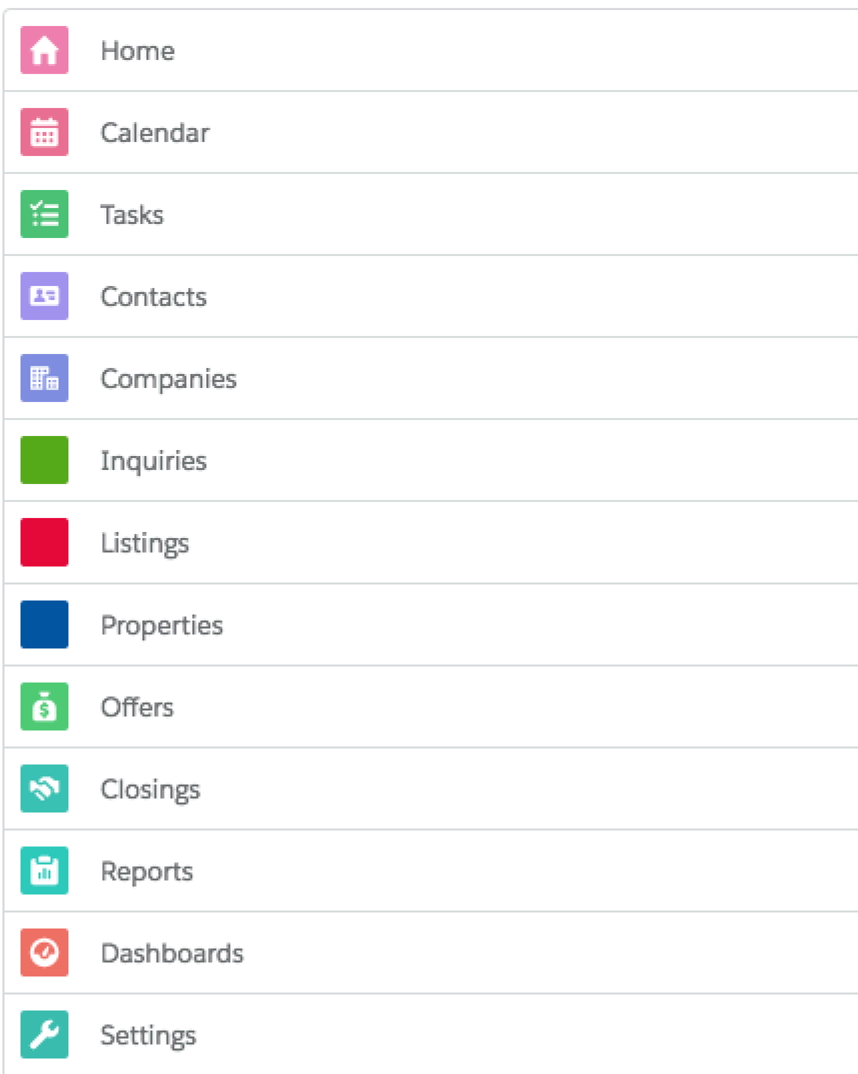
- **Select the Propertybase Logo** that you just downloaded.
- **Type #2A74B2** where is says Primary Color Hex Value.

- **Click Save.**
- **Click Select Items** tab on the left side of the screen.



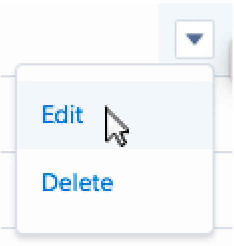
- **Add/remove tabs** to match the image below (or however you like.)

> Note: Tabs can be rearranged by using the left/right and up/down arrows.



- **Click Save.**
- **Click Back** (top right corner of the screen.)
- **Find the Propertybase Agent** application.

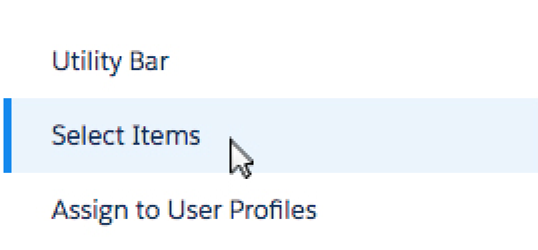
- **Click the far-right arrow** and **select Edit.**



- **Click Upload** under Image.

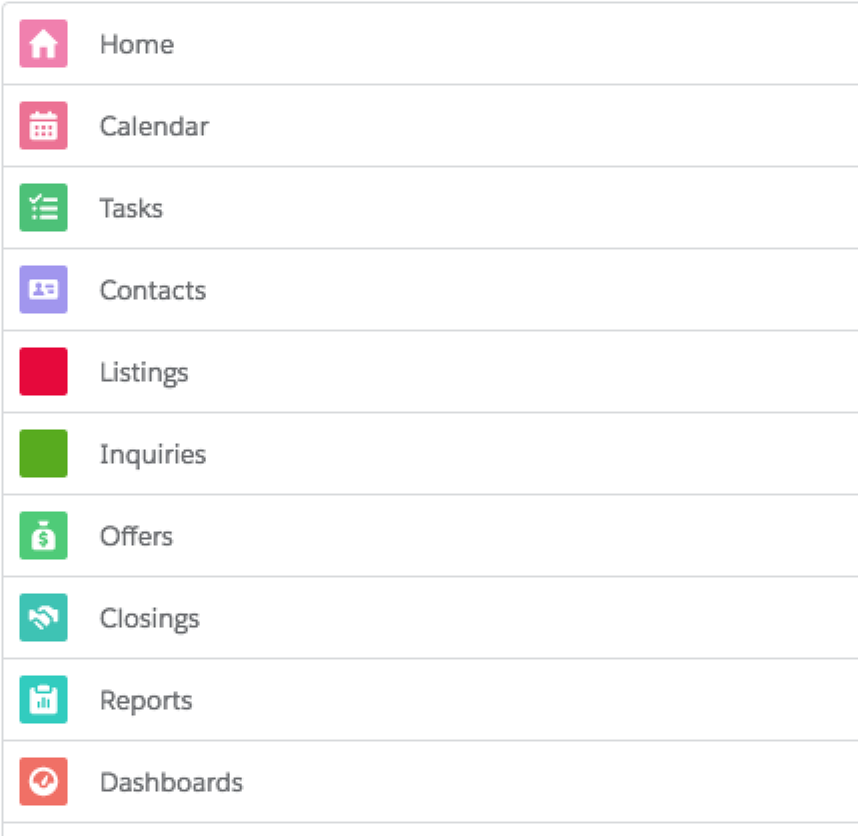
- **Select the Propertybase Logo** that you downloaded in the previous step.
- **Type #2A74B2** where is says Primary Color Hex Value.

- **Click Save.**
- **Click Select Items** tab on the left side of the screen.



- **Add/remove tabs** to match the image below (or however you like.)

> Note: Tabs can be rearranged by using the left/right and up/down arrows.

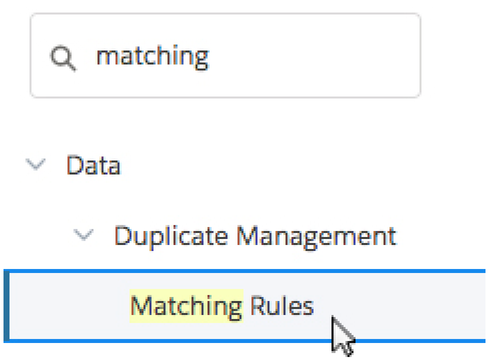


- **Click Save.**
- **Click Back** (top right corner of the screen.)

7e: Update Contact Duplicate Finder

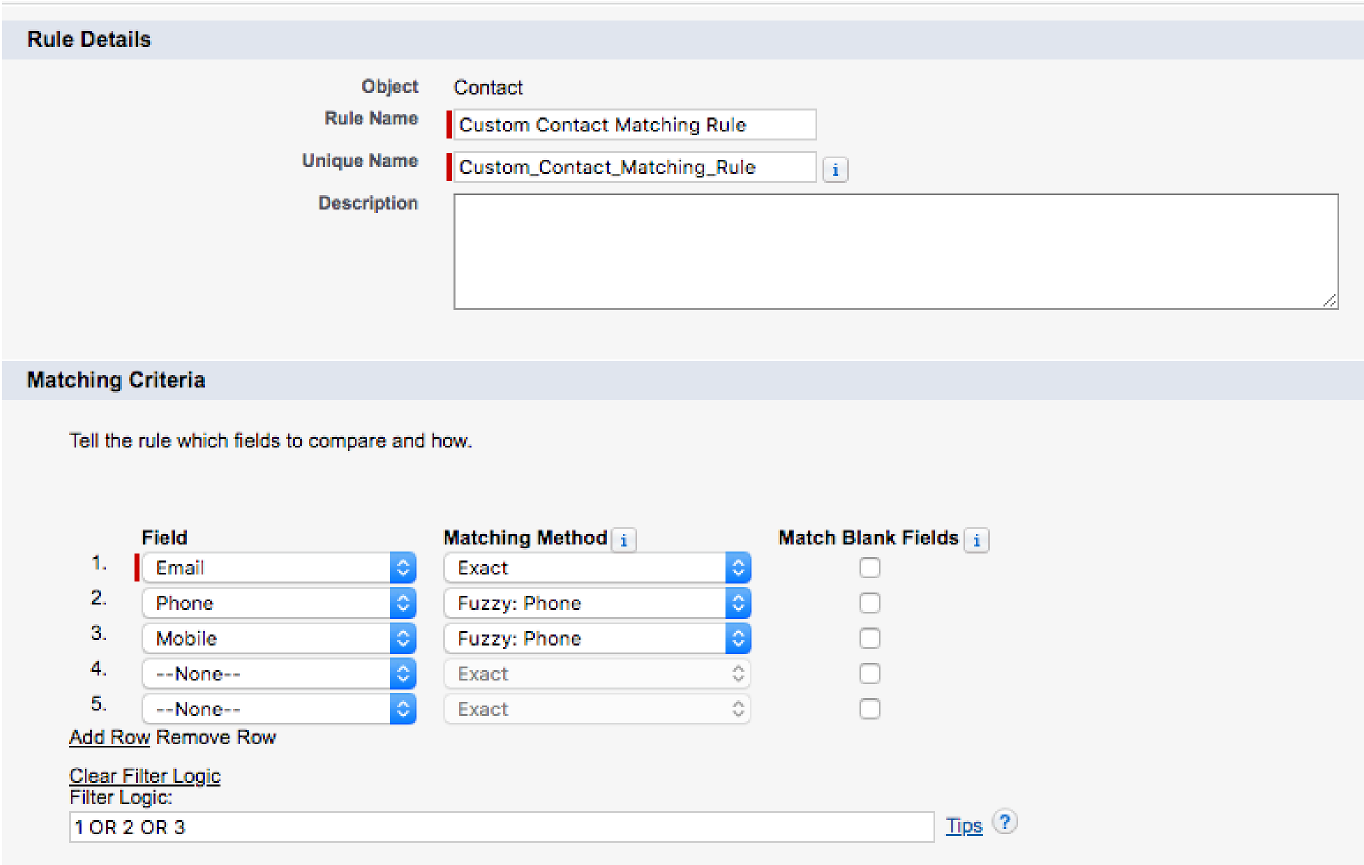
Next we will create a custom matching rule that will allow Propertybase to automatically search for duplicate Contact records.

- In the Quick Find menu, **type 'Matching'** and then **click Matching Rules**.



- In the middle of the screen, **click New Rule**.

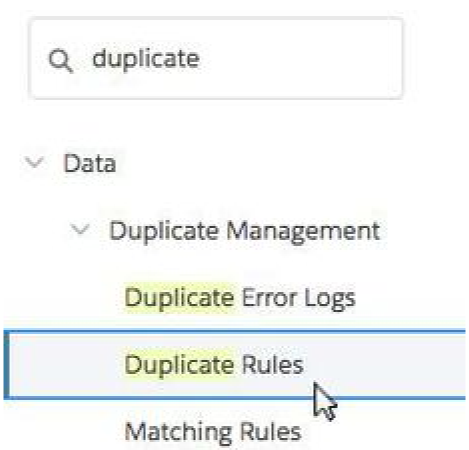
- For Object, **select Contact**.
- **Click Next**.
- **Copy all the information** as it appears in the image below.



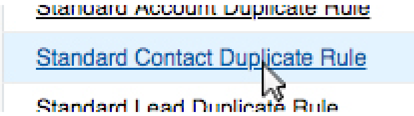
- **Click Save**.
- On the next page, **click Activate**.

Now that our custom matching rule is built and activated, we need to set it as our standard contact duplicate rule.

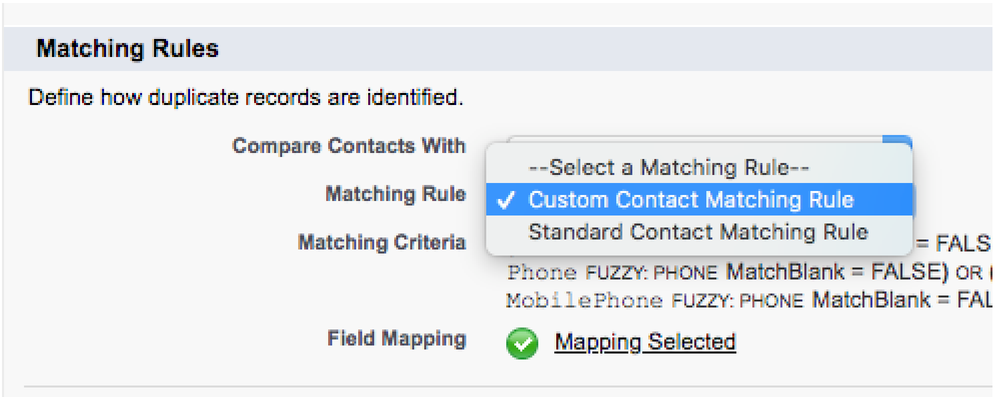
- From Setup, in the Quick Find menu, **click Duplicate Rules** underneath Data.



- In the list of duplicate rules, **click Standard Contact Duplicate Rule**.



- In the list of actions, **click Edit**.
- On the next page, scroll down and **select the new matching rule**.



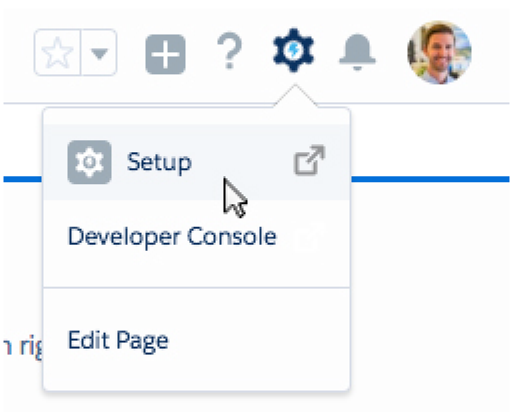
- **Click Save** at the bottom of the page.

Section 8: Create Required Fields

In order for our Migration Support Team to assist you in the next section, there are a few fields that need to be created first.

8a: Create 'Next Action' Field

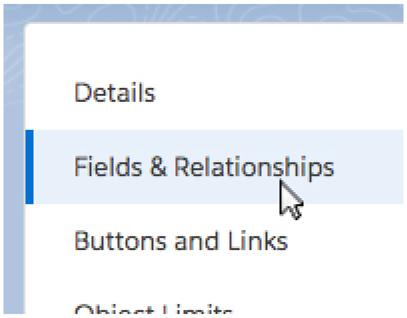
- **Click the gear icon** in the top right of the screen, then **click Setup**.



- **Click Object Manager** at the top of the screen.

- Scroll down and **click Activity**.

- **Click Fields & Relationships** in the left hand menu.

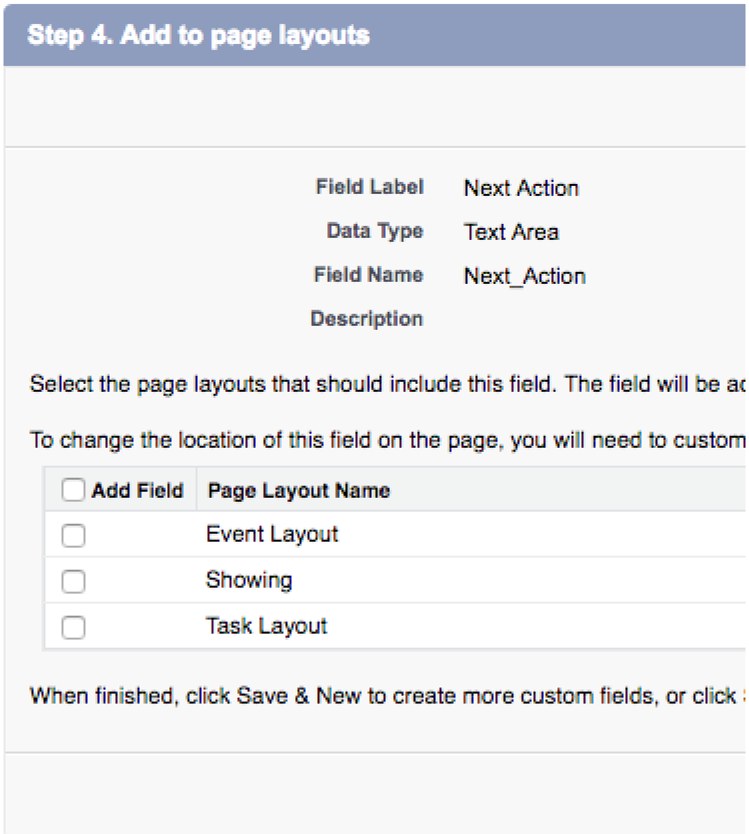


- **Click New** in the top right corner of the screen.

- For data type **select Text Area.**
- **Click Next**.
- **Create the "Next Action" field** as shown below.

\

- **Click Save**.
- **Click Next** (leave field-level security options at their defaults.)
- On "Add to page layouts" step, **uncheck all**.



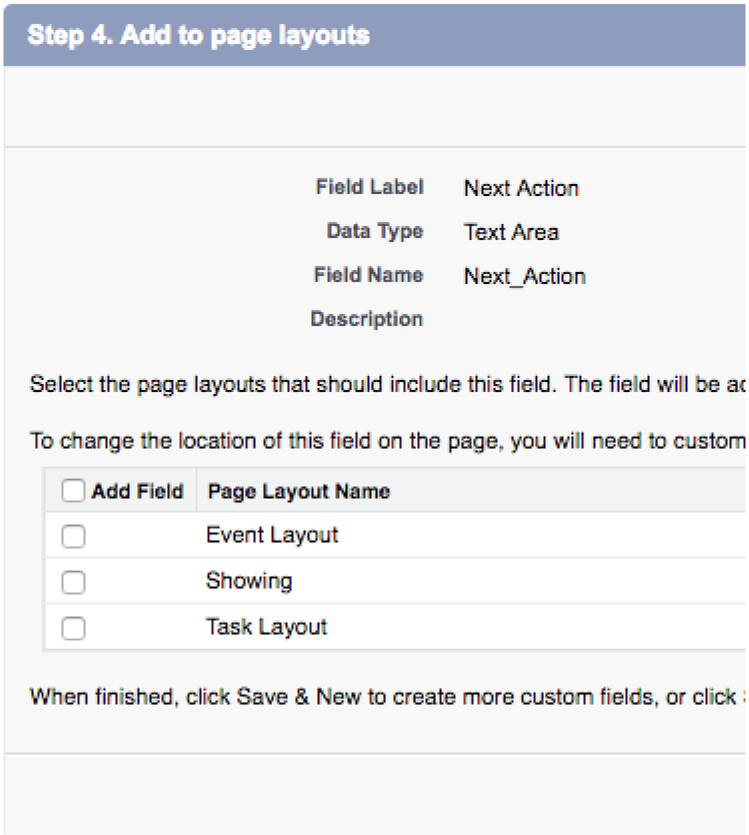
- **Click Save & New**.

8b: Create 'Next Action Date' Field

- For data type **select Date.**
- **Click Next**.
- **Create the "Next Action Date" field** as shown below.

- **Click Save**.
- **Click Next** (leave field-level security options at their defaults.)

- On "Add to page layouts" step, **uncheck all**.

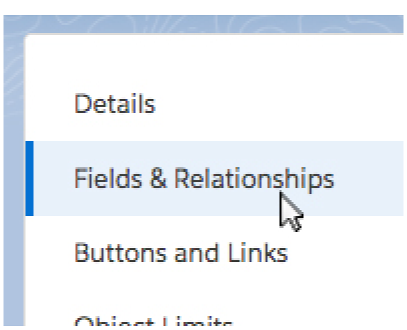


- **Click Save**.

8c: Create 'Buyer Tenant' Field

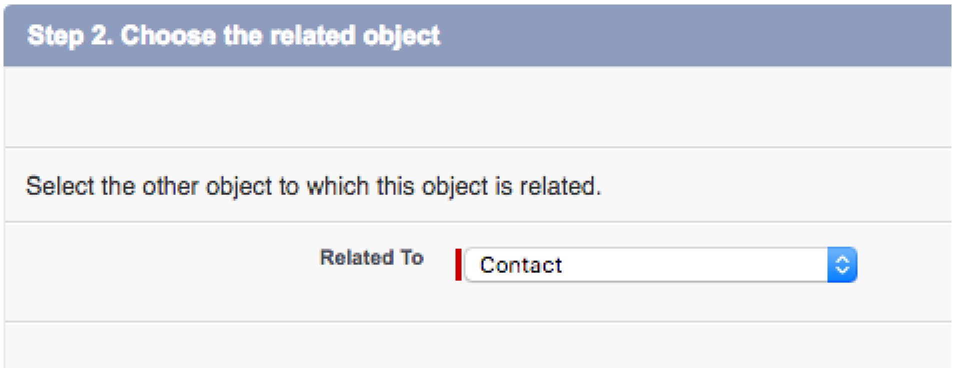
- **Click Object Manager** at the top of the screen.

- In the list of objects, **click Closing**.
- **Click Fields & Relationships** in the left hand menu.

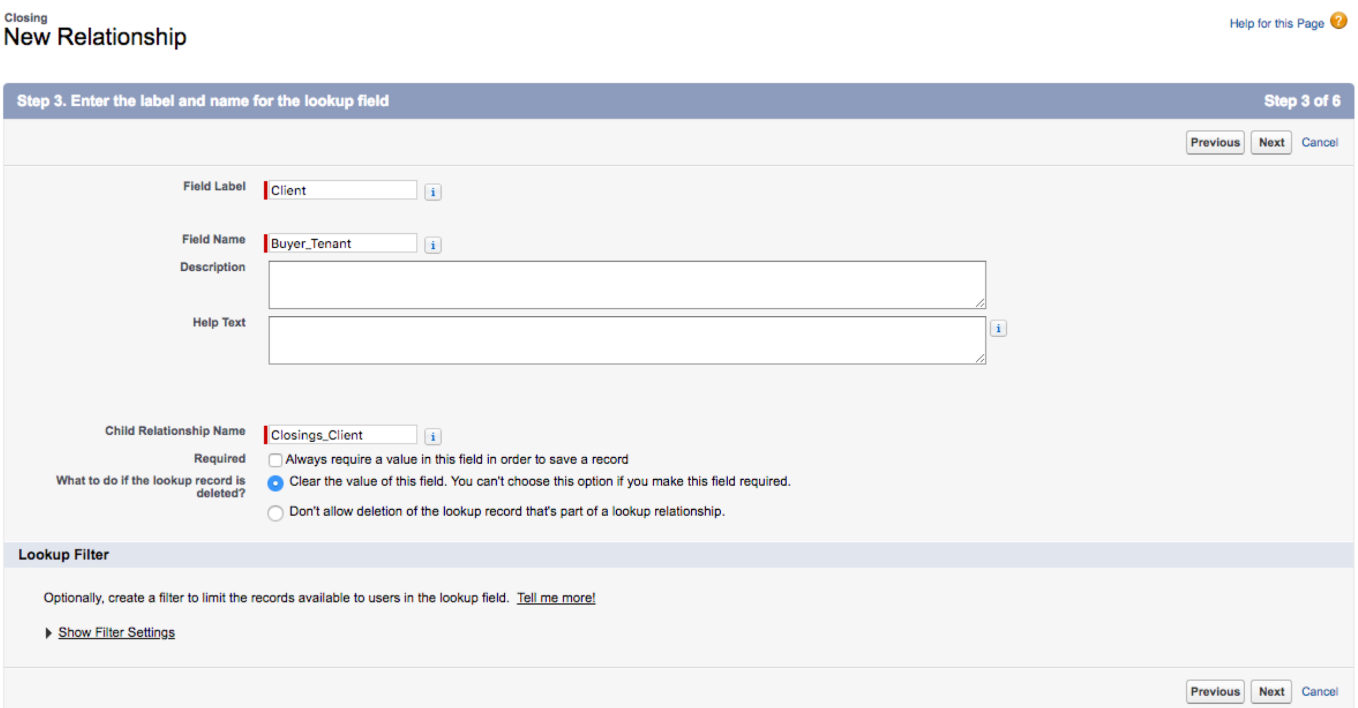


- **Click New** in the top right corner of the screen.

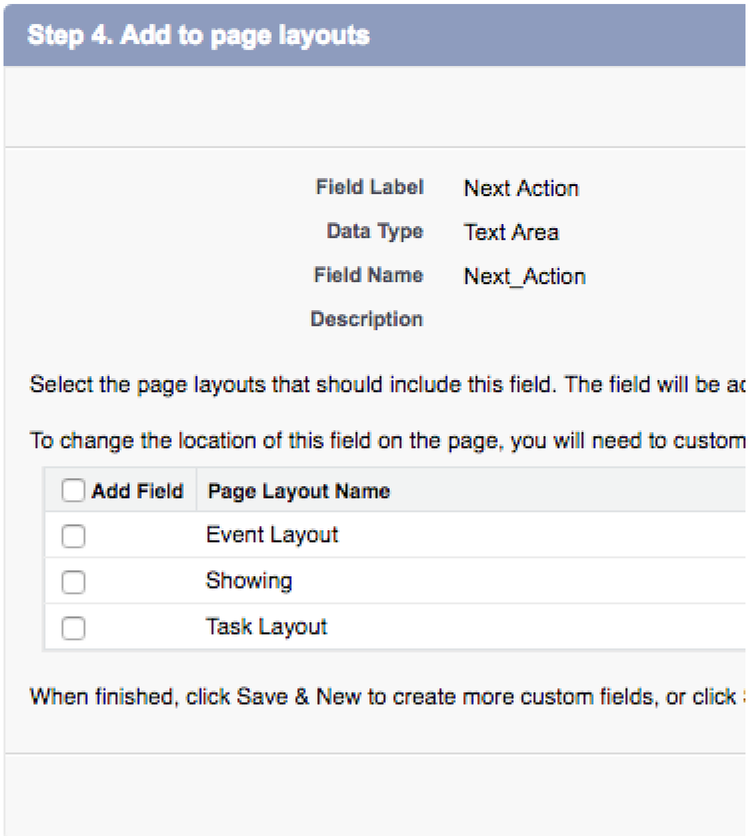
- For data type **select Lookup Relationship.**
- **Click Next**.
- For Related To, **select Contact**.



- **Click Next**.
- **Replicate the "Client" field** as shown below.



- **Click Save**.
- **Click Next** (leave field-level security options at their defaults.)
- On "Add to page layouts" step, **uncheck all**.



- **Click Save**.

Section 9: Contact Propertybase Migration Support

Next, we need to create the default actions that exist in Propertybase Lightning. However, there are over fifty of them and we would hate for you to have to create all of them manually (trust us - we've done it!)

Please follow the steps below to request Propertybase migration support.

1. Click here to **open a new support request**.
2. In your request, **state that you are in the middle of a migration** and **need assistance importing the default Lightning actions**.
3. Please note whether you are in a **sandbox environment or production environment**.
4. Please include your **company name and org ID**. (Click here for help locating your org ID.)
5. Lastly, **you must include your admin username & password** in order to be assisted.

Once Propertybase has assisted you, continue the migration process below.

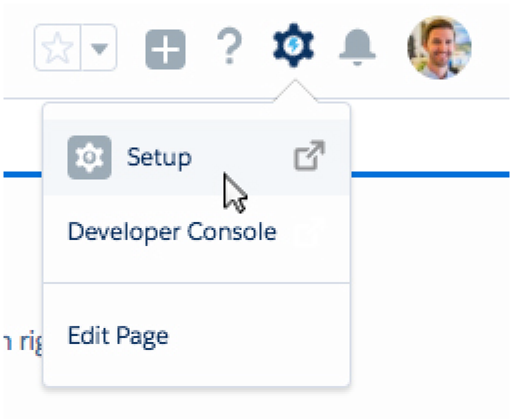
Section 10: Create Remaining Buttons & Actions

Although we import most actions for you, due to technical limitations, a couple actions still need to be creating manually.

> Note: Before starting this section, watch the video below for a quick overview on creating actions.
>
> Your browser does not support the HTML5 video element
>
> Click here to view the video above in a web browser.

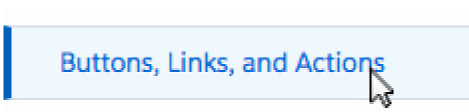
Note: If your account already contains these actions, you do not need to create them.

- **Click the gear icon** in the top right of the screen, then **click Setup**.

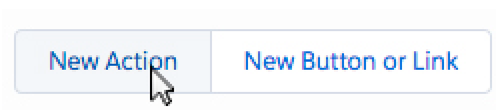


- **Click Object Manager** at the top of the screen.

- Scroll down and **click Contact**.
- **Click Buttons, Links and Actions** in the left hand menu.

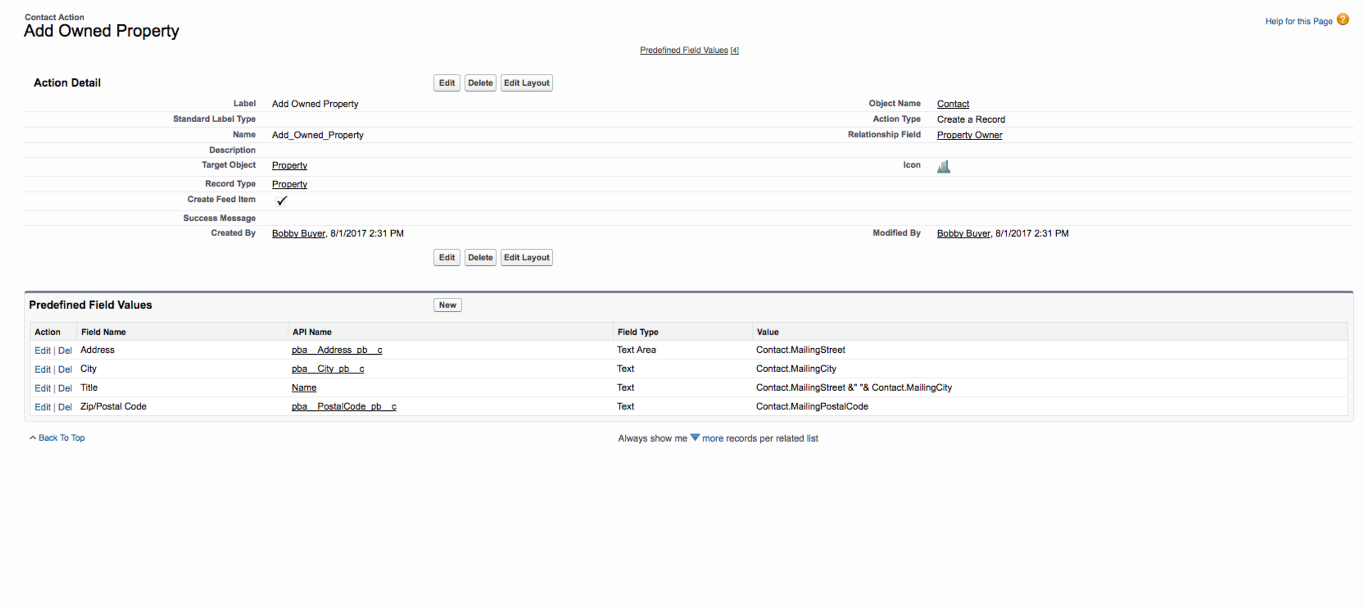


- **Click New Action** in the top right corner of the screen.



- **Create the "Add Owned Property" action** using the images below (action details and layout details.)

Action Details


Contact Action
Add Owned Property

Predefined Field Values [4]

Help for this Page

Action Detail

Label	Add Owned Property	Object Name	Contact
Standard Label Type		Action Type	Create a Record
Name	Add_Owned_Property	Relationship Field	Property Owner
Description			
Target Object	Property	Icon	
Record Type	Property		
Create Feed Item	✓		
Success Message			
Created By	Bobby Buyer, 8/1/2017 2:31 PM	Modified By	Bobby Buyer, 8/1/2017 2:31 PM

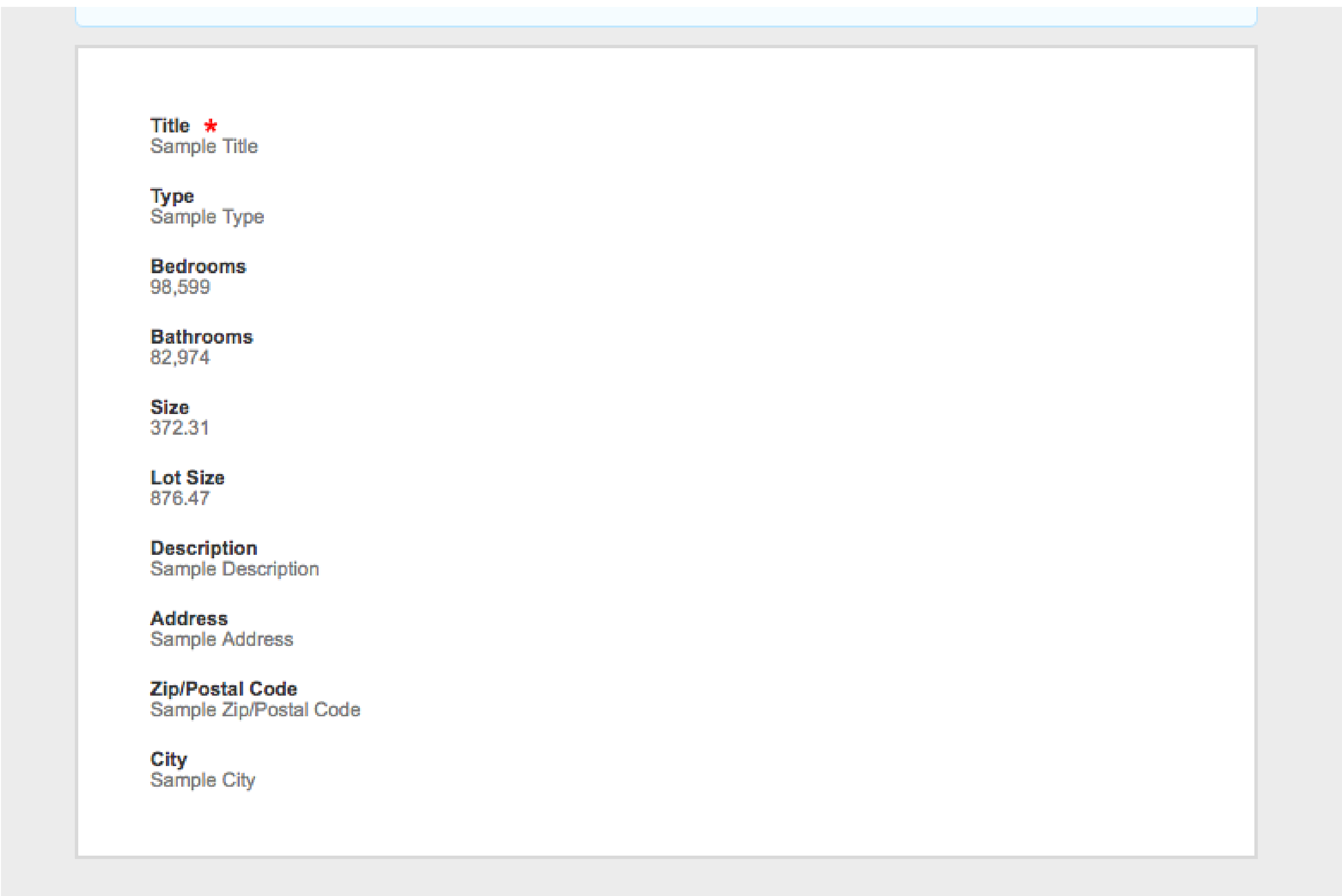
Predefined Field Values

Action	Field Name	API Name	Field Type	Value
Edit | Del	Address	pba__Address_pb__c	Text Area	Contact.MailingStreet
Edit | Del	City	pba__City_pb__c	Text	Contact.MailingCity
Edit | Del	Title	Name	Text	Contact.MailingStreet &" "& Contact.MailingCity
Edit | Del	Zip/Postal Code	pba__PostalCode_pb__c	Text	Contact.MailingPostalCode

Back To Top

Always show me more records per related list

Layout Details


Title *
Sample Title

Type
Sample Type

Bedrooms
98,599

Bathrooms
82,974

Size
372.31

Lot Size
876.47

Description
Sample Description

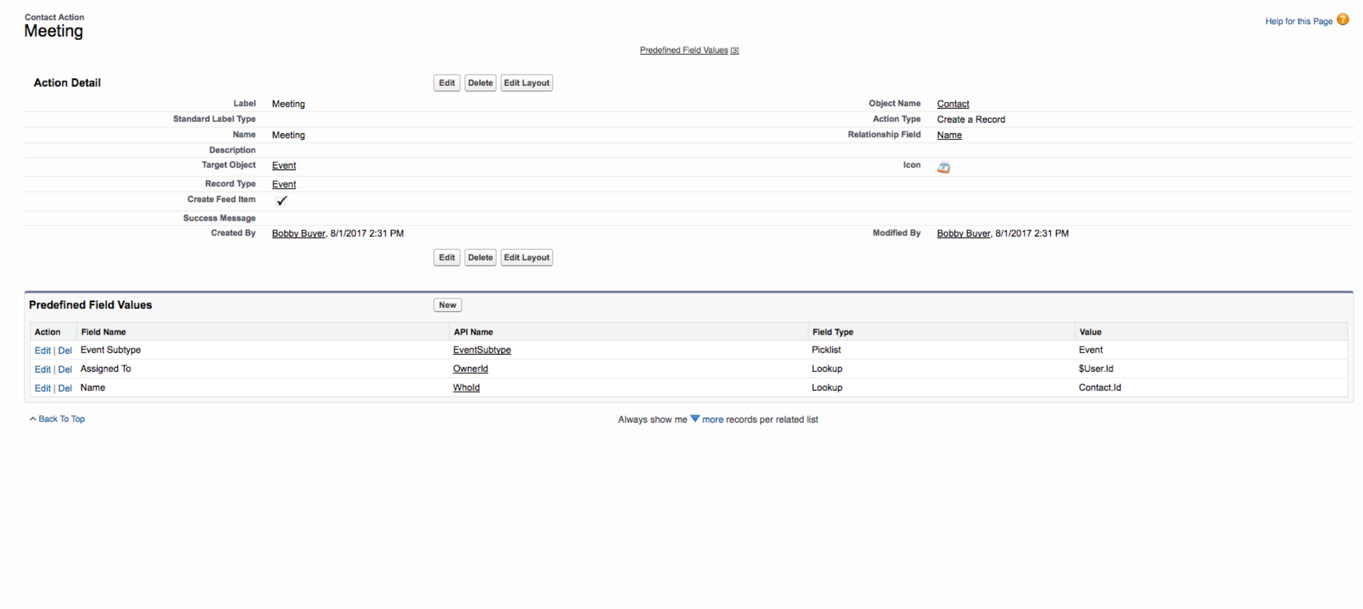
Address
Sample Address

Zip/Postal Code
Sample Zip/Postal Code

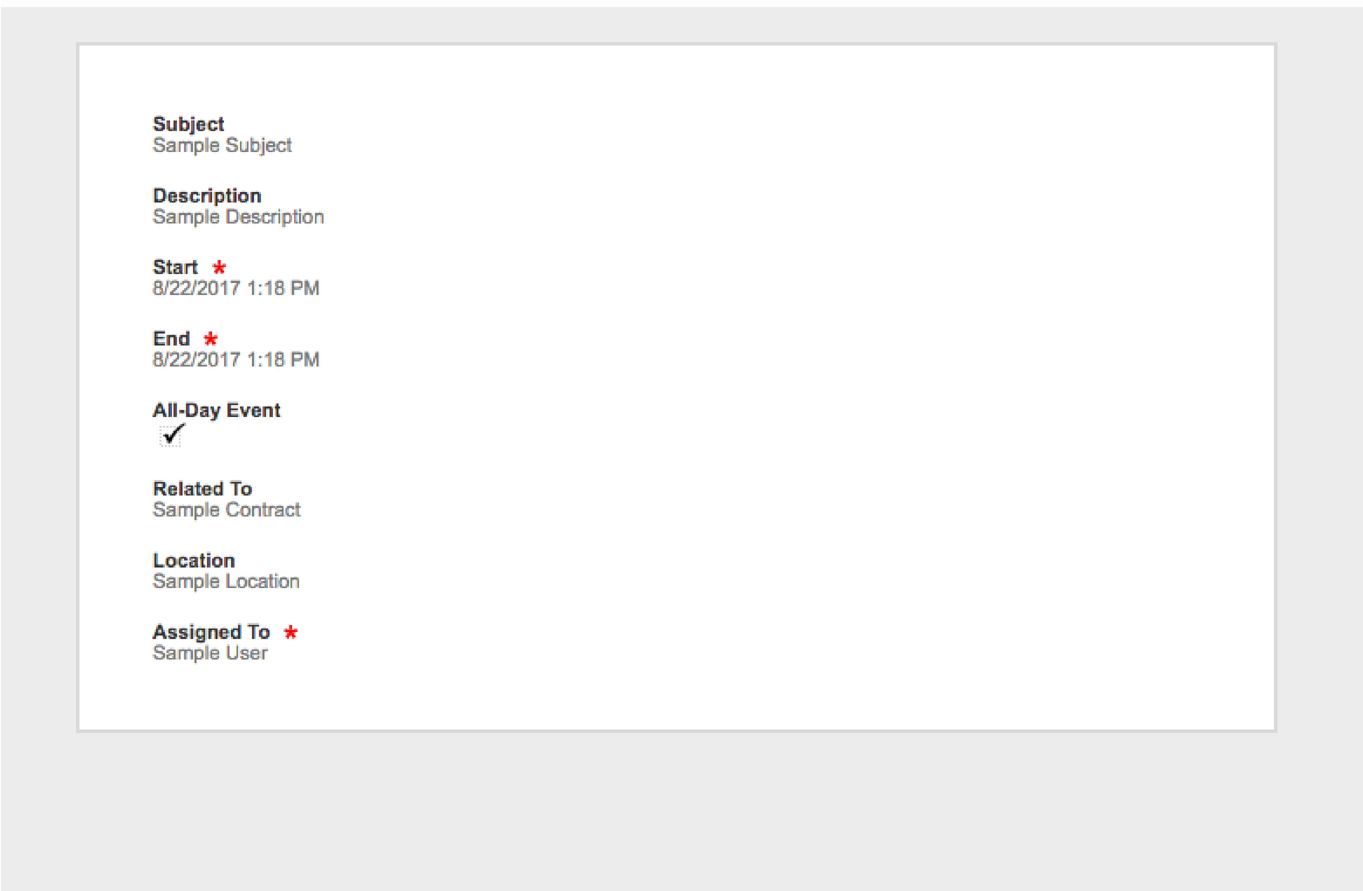
City
Sample City

- **Create the "Meeting" action** using the images below (action details and layout details.)

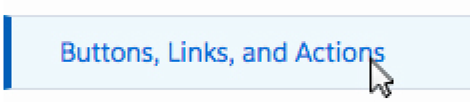
Action Details



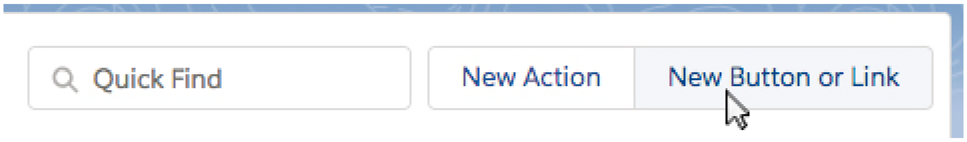
Layout Details



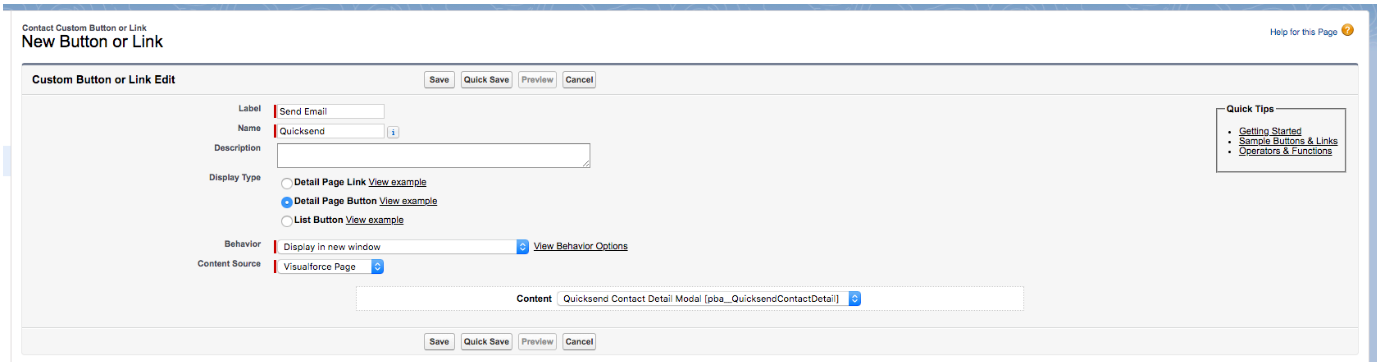
- **Click Buttons, Links and Actions** in the left hand menu.



- **Click New Button or Link** in the top right corner of the screen.



- **Create a new button** called "Send Email" using the details below.



- **Click Save**.

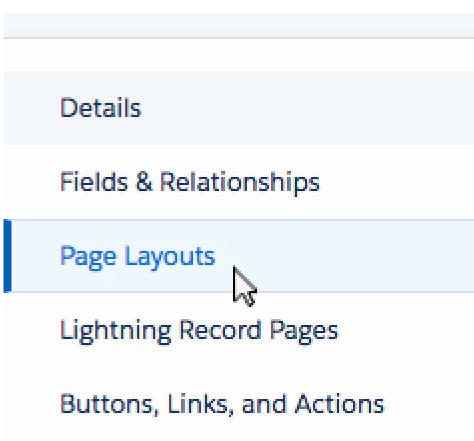
Section 11: Configure Page Layouts

Now that we have created all of our Lightning actions, it's time to organize them on each Object's Page Layout.

11a: Configure Page Layout for Closings

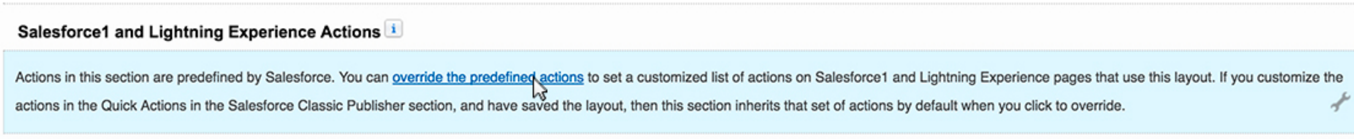
- **Click Object Manager** at the top of the screen.

- Scroll down and **click Closing**.
- **Click Page Layouts** in the left hand menu.

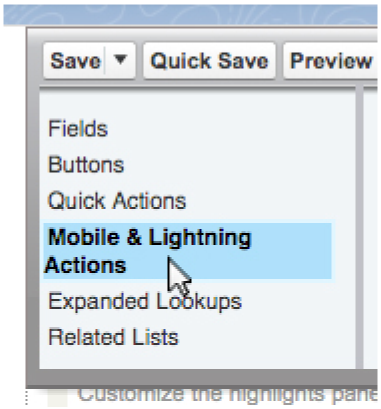


- On the next screen, **click Closing Layout.**
- Under Mobile and Lightning Experience Actions, **click Override the Predefined Actions**.

Note: In some orgs, 'Mobile' may display as 'Salesforce Mobile' or 'Salesforce1'. These can be treated as the same thing.

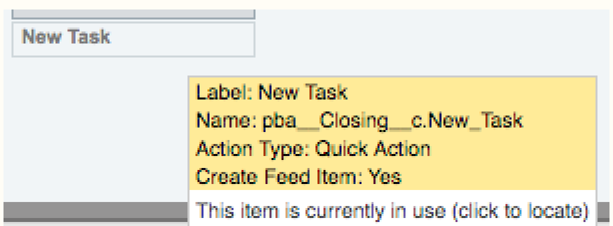


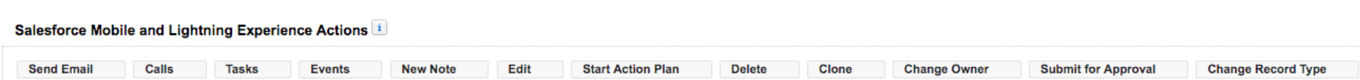
- At the top of the page, **click Mobile & Lightning Actions** in the grey box.



- **Drag actions** from the grey box at the top of the screen, down to the Mobile & Lightning Actions area **so that the actions match those listed in the image below**.

Note: If you have multiple actions with the same name, hover over the action and look for the Name prefix "pba__" as shown below.





Note: Action names may differ slightly. "Log A Call" , "Calls" and "New Call" are all the same action.

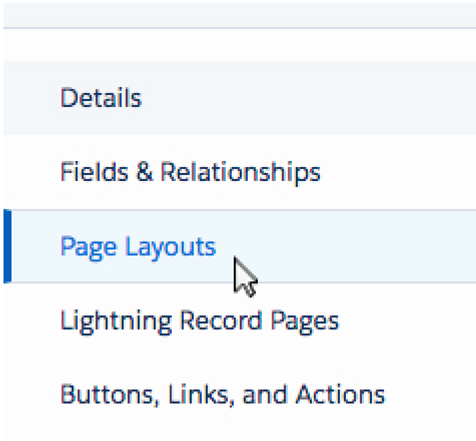
- **Click Save.**

11b: Configure Page Layout for Companies

- **Click Object Manager** at the top of the screen.

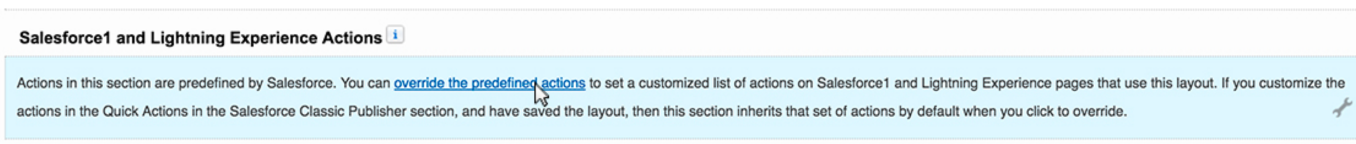
- Scroll down and **click Company**.

- **Click Page Layouts** in the left hand menu.

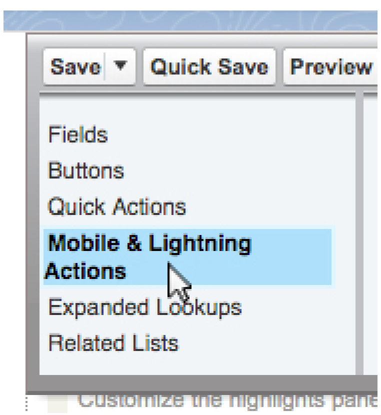


- On the next screen, **click Account Layout.**
- Under Mobile and Lightning Experience Actions, **click Override the Predefined Actions**.

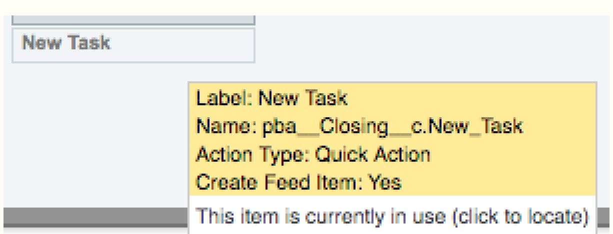
> Note: In some orgs, 'Mobile' may display as 'Salesforce Mobile' or 'Salesforce1'. These can be treated as the same thing.



- At the top of the page, **click Mobile & Lightning Actions** in the grey box.



- **Drag actions** from the grey box at the top of the screen, down to the Mobile & Lightning Actions area **so that the actions match those listed in the image below**.

> Note: If you have multiple actions with the same name, hover over the action and look for the Name prefix "pba__" as shown below.
>
> 
>

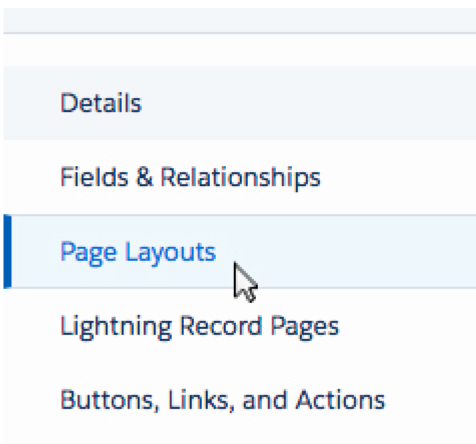
- **Click Save.**

Note: For the Company object you can safely ignore SystemInternalLayout Page Layout.

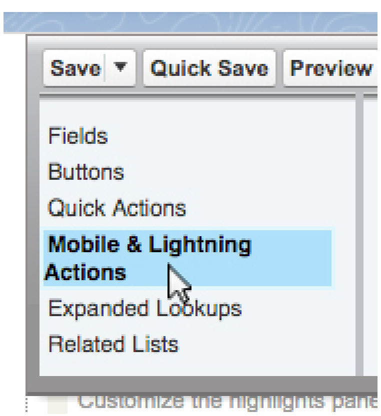
11c: Configure Page Layout for Contacts

- **Click Object Manager** at the top of the screen.

- Scroll down and **click Contact**.
- **Click Page Layouts** in the left hand menu.

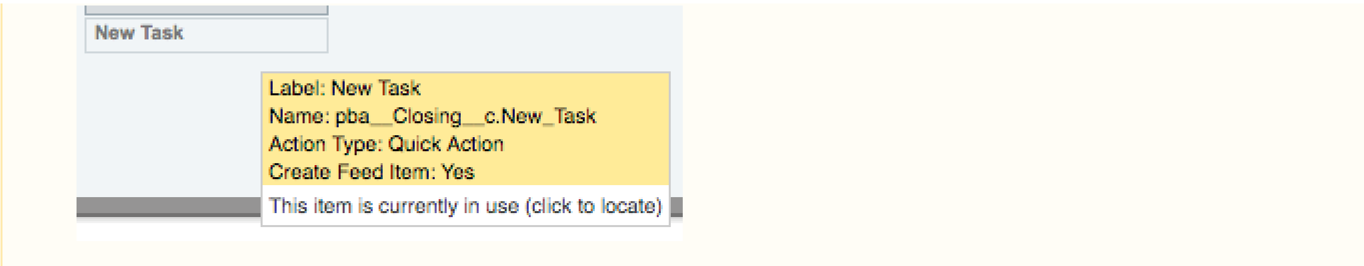


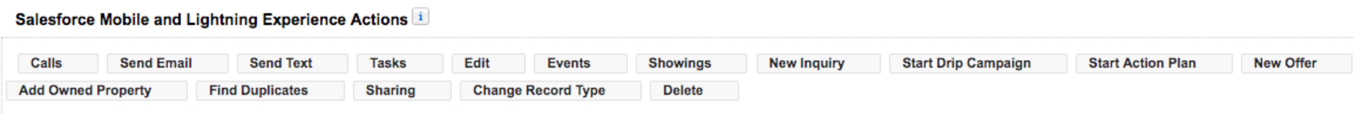
- On the next screen, **click Individual Contact** (some orgs called it Individual Client).
- At the top of the page, **click Mobile & Lightning Actions** in the grey box.



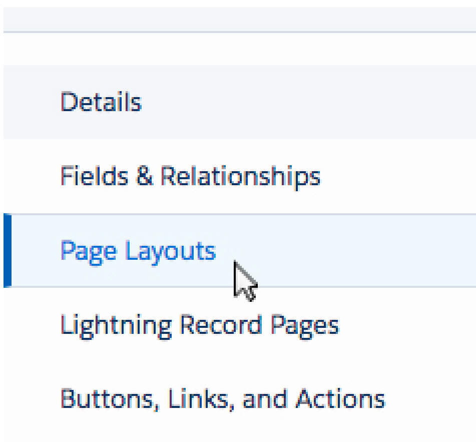
- **Drag actions** from the grey box at the top of the screen, down to the Mobile & Lightning Actions area **so that the actions match those listed in the image below**.

Note: If you have multiple actions with the same name, hover over the action and look for the Name prefix "pba__" as shown below.

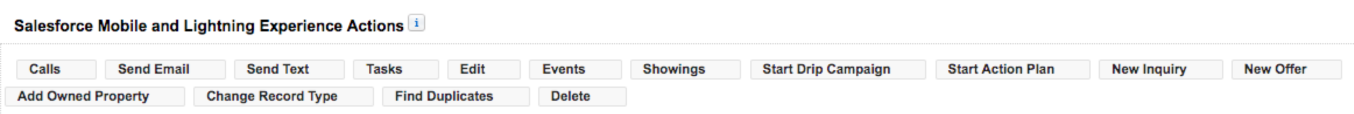




- **Click Save.**
- **Click Page Layouts** in the left hand menu.



- On the next screen, **click Company Contact**.
- **Drag actions** from the grey box at the top of the screen, down to the Mobile & Lightning Actions area **so that the actions match those listed in the image below**.

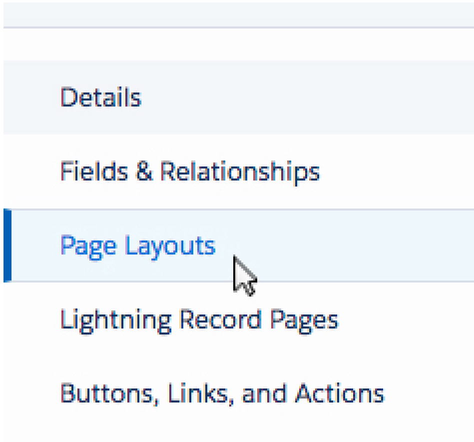


- **Click Save.**

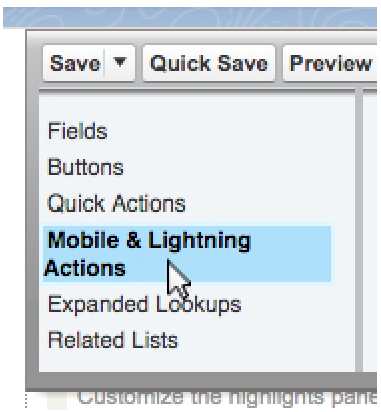
11d: Configure Page Layout for Listings

- **Click Object Manager** at the top of the screen.

- Scroll down and **click Listing**.
- **Click Page Layouts** in the left hand menu.

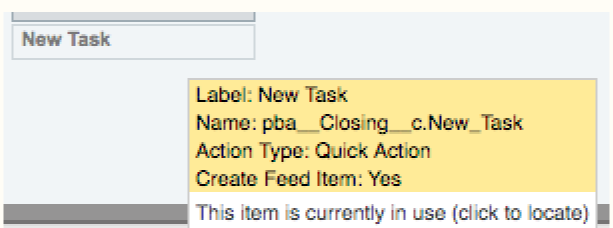


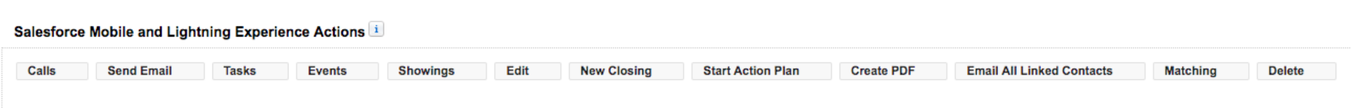
- On the next screen, **click Rent**.
- At the top of the page, **click Mobile & Lightning Actions** in the grey box.



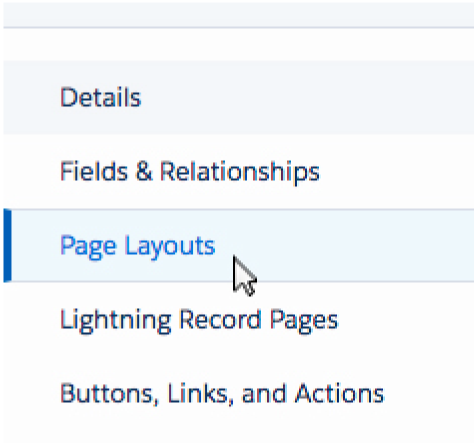
- **Drag actions** from the grey box at the top of the screen, down to the Mobile & Lightning Actions area **so that the actions match those listed in the image below**.

Note: If you have multiple actions with the same name, hover over the action and look for the Name prefix "pba__" as shown below.

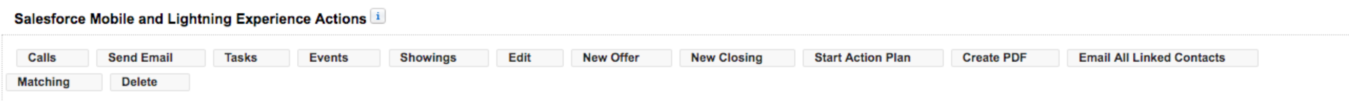




- **Click Save.**
- **Click Page Layouts** in the left hand menu.



- On the next screen, **click Sale**.
- **Drag actions** from the grey box at the top of the screen, down to the Mobile & Lightning Actions area **so that the actions match those listed in the image below**.

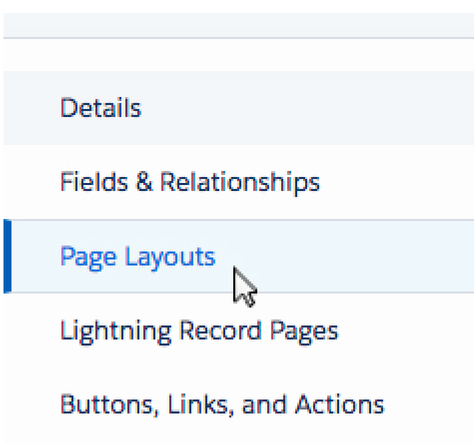


- **Click Save.**

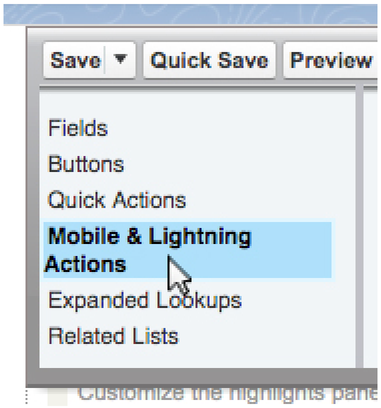
11e: Configure Page Layout for Offers

- **Click Object Manager** at the top of the screen.

- Scroll down and **click Offer**.
- **Click Page Layouts** in the left hand menu.

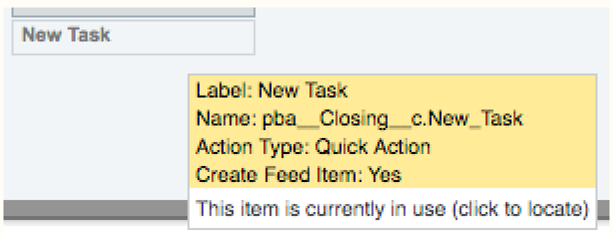


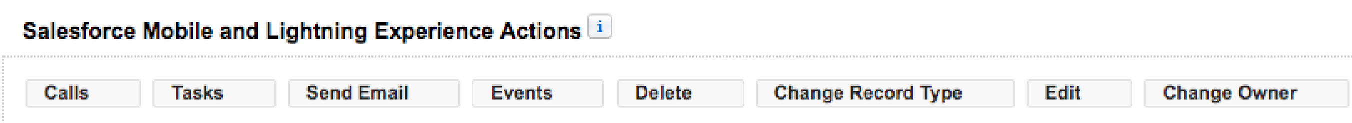
- On the next screen, **click Inactive/Cancelled**.
- At the top of the page, **click Mobile & Lightning Actions** in the grey box.



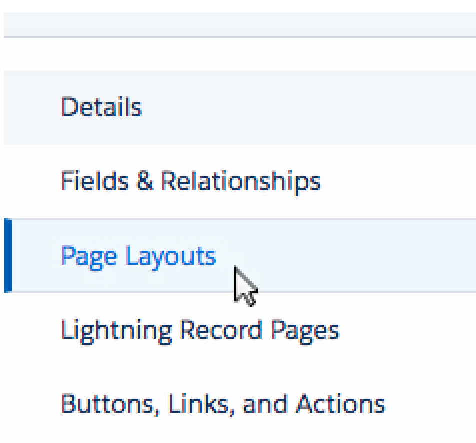
- **Drag actions** from the grey box at the top of the screen, down to the Mobile & Lightning Actions area **so that the actions match those listed in the image below**.

Note: If you have multiple actions with the same name, hover over the action and look for the Name prefix "pba__" as shown below.

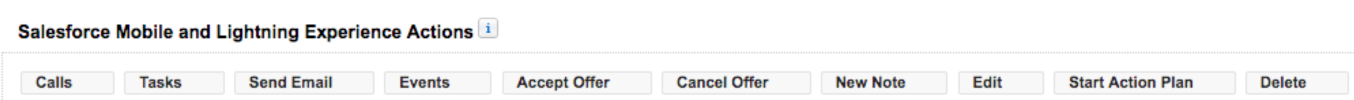




- **Click Save.**
- **Click Page Layouts** in the left hand menu.

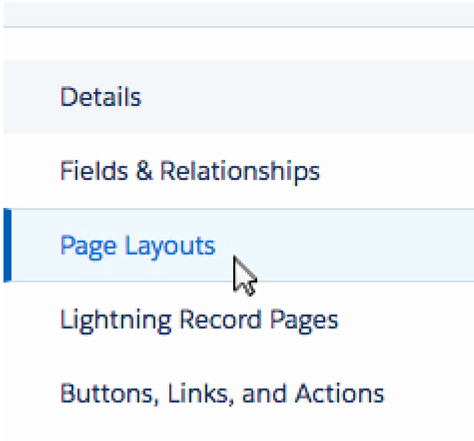


- On the next screen, **click Offer Layout**.
- **Drag actions** from the grey box at the top of the screen, down to the Mobile & Lightning Actions area **so that the actions match those listed in the image below**.

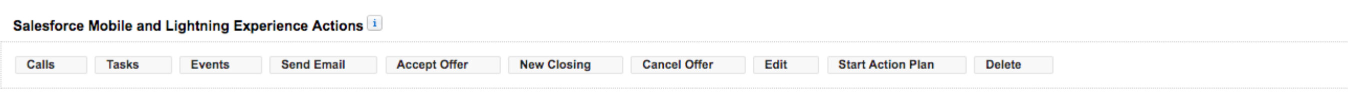


- **Click Save.**

- **Click Page Layouts** in the left hand menu.



- On the next screen, **click Rental Offer**.
- **Drag actions** from the grey box at the top of the screen, down to the Mobile & Lightning Actions area **so that the actions match those listed in the image below**.



- **Click Save.**

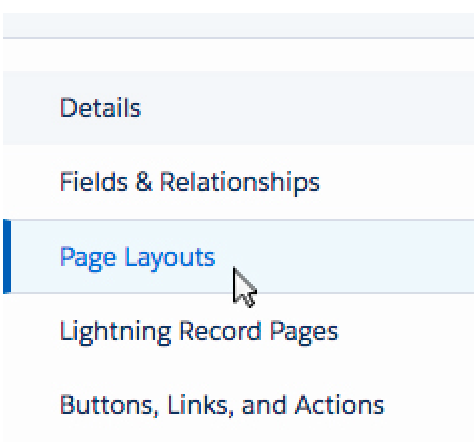
11f: Configure Page Layout for Requests (Inquiries)

- **Click Object Manager** at the top of the screen.

- Scroll down and **click Request**.

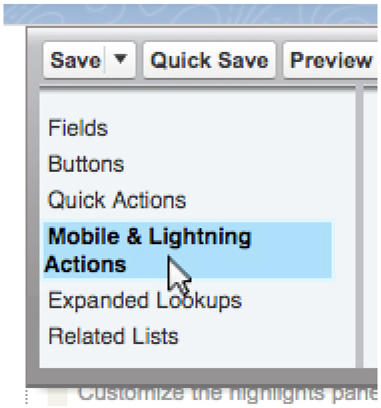
Note: For some accounts this may be labled "Inquiry". If so, subsitute "Inquiry" for anytime you see "Request" in this documentation.

- **Click Page Layouts** in the left hand menu.

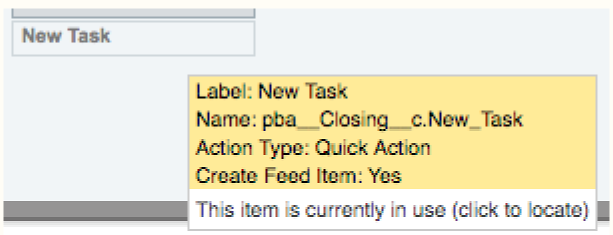


- On the next screen, **click Request Layout**.

- At the top of the page, **click Mobile & Lightning Actions** in the grey box.



- **Drag actions** from the grey box at the top of the screen, down to the Mobile & Lightning Actions area **so that the actions match those listed in the image below**.

> Note: If you have multiple actions with the same name, hover over the action and look for the Name prefix "pba__" as shown below.
>
> 
>

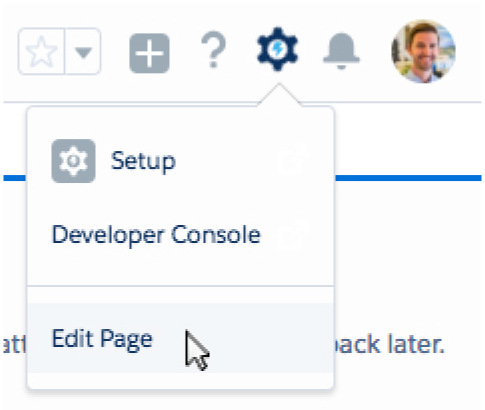
- **Click Save.**

Section 12: Configure Page Layouts

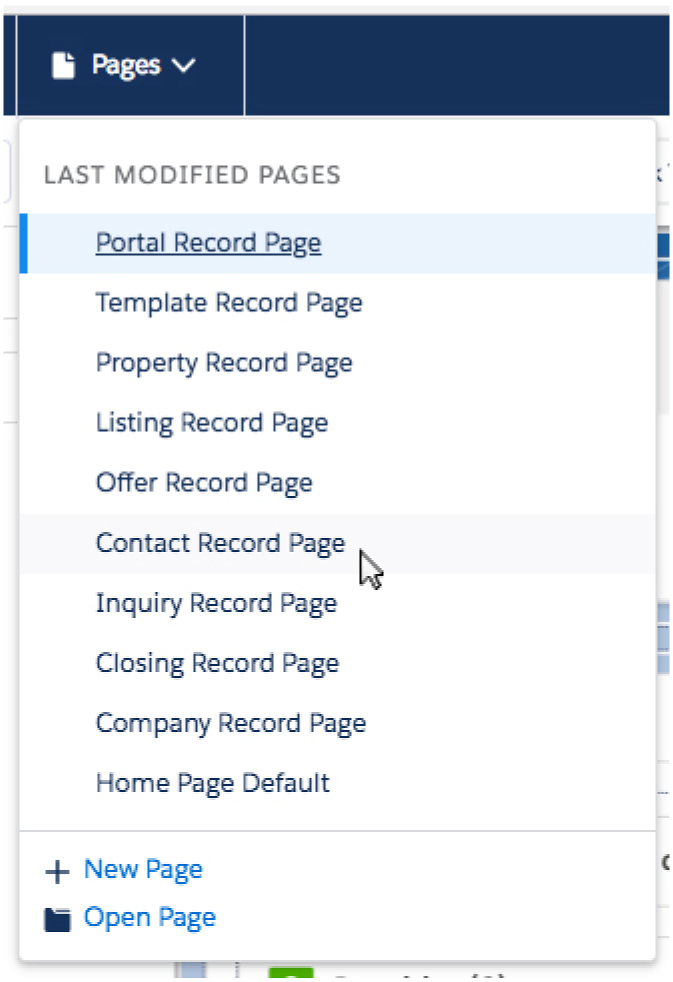
At Propertybase we've spent a lot of time designing a user interface that tailors specifically to the needs of today's real estate professionals. In this next section we will add, remove, and modify user interface components to do just that.

12a: Configure the Contact Lightning Page

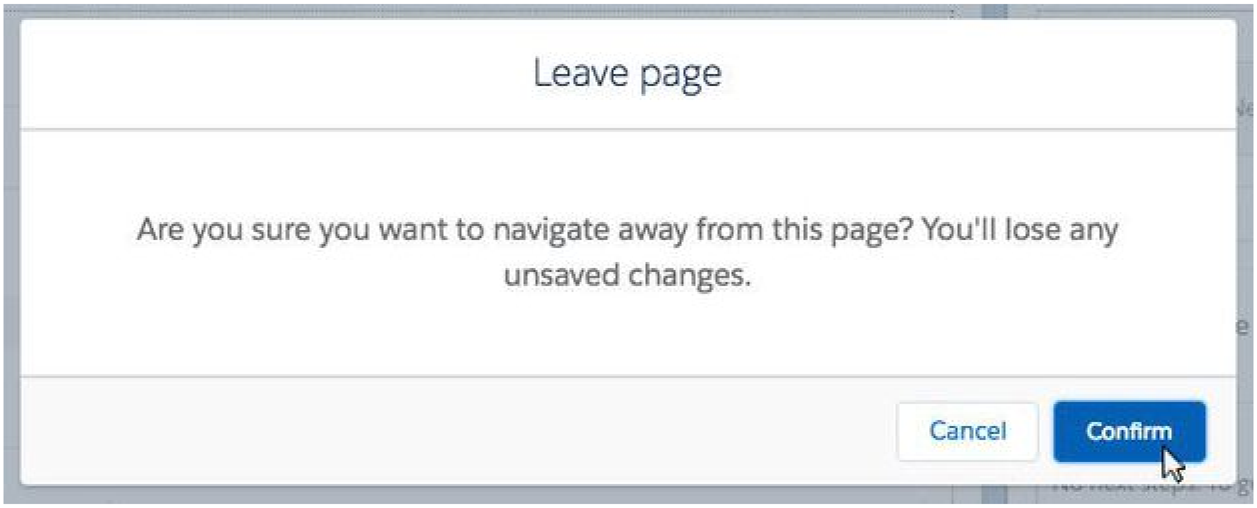
- **Open any Contact record**, then **click the gear icon** in the top right menu and **click Edit Page**.



- **Click the Pages dropdown** in the top left and then **select Contact Record Page**.

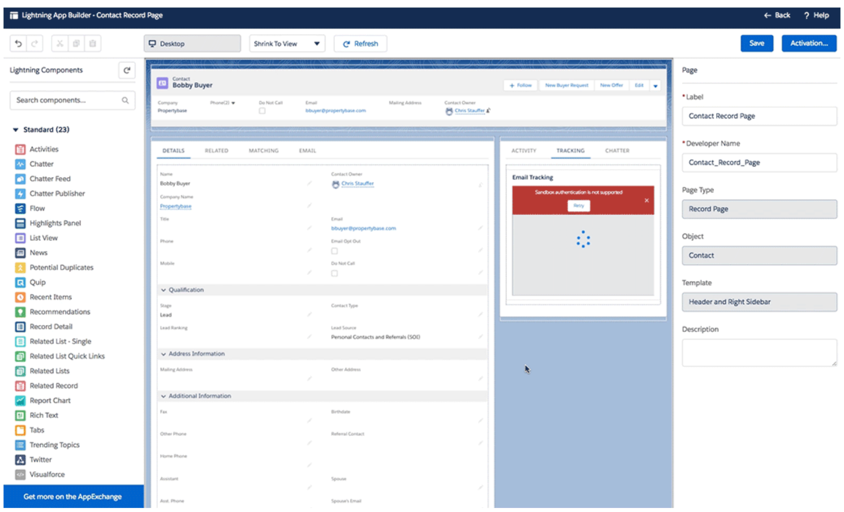


- When prompted to leave the page, **click Confirm**.



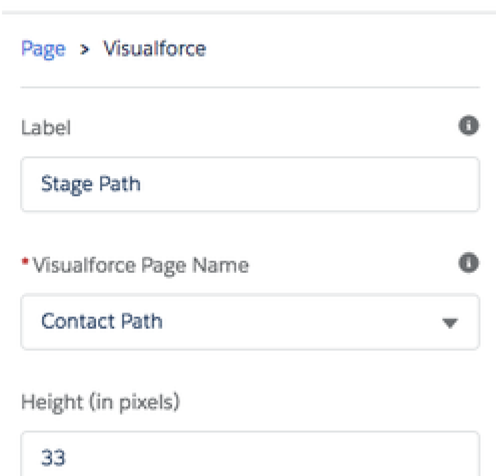
Voila! Most of the page layout has already been configured for you. Let's add the few remaining components below.

- **Drag a Visualforce component** (under the left side Standard list) to the location shown in the image below.



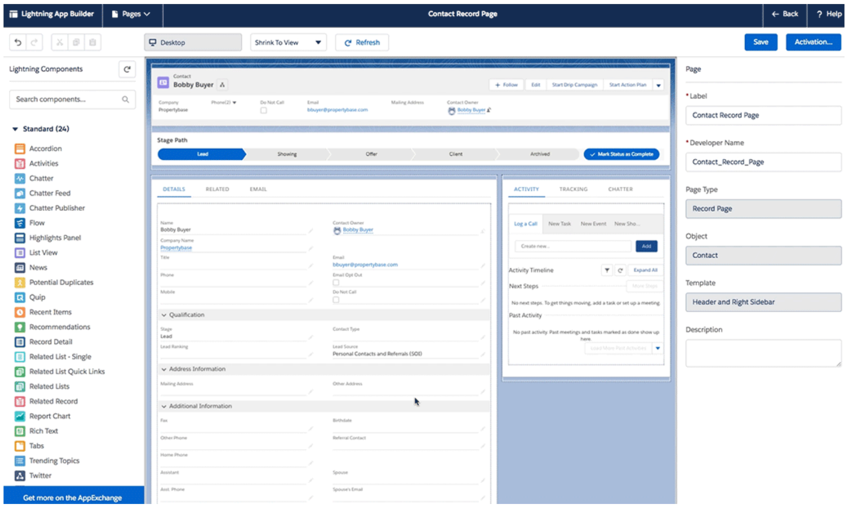
Click here to view the animation above in a web browser.

- Inside the right column, **enter the values for Label, Visualforce Page Name and Height** as they appear in the screenshot below.



Note: We will resolve the "define a valid picklist" error at the end of this section.

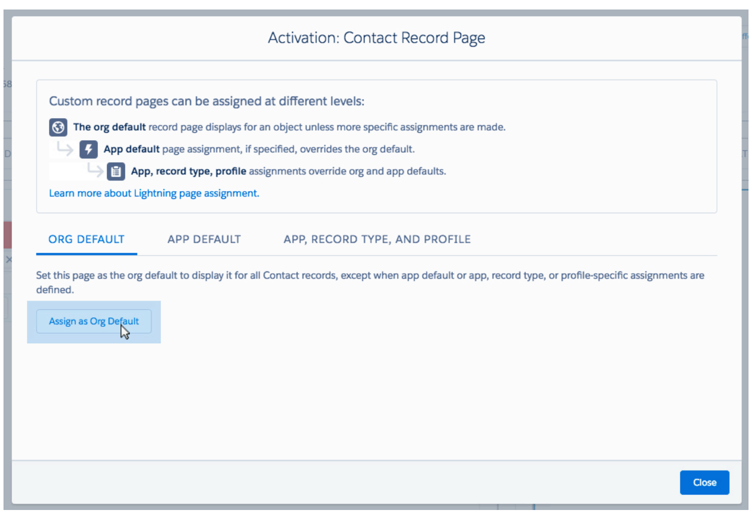
- **Drag Potential Duplicates** (under the left side Standard list) to the location shown in the image below.



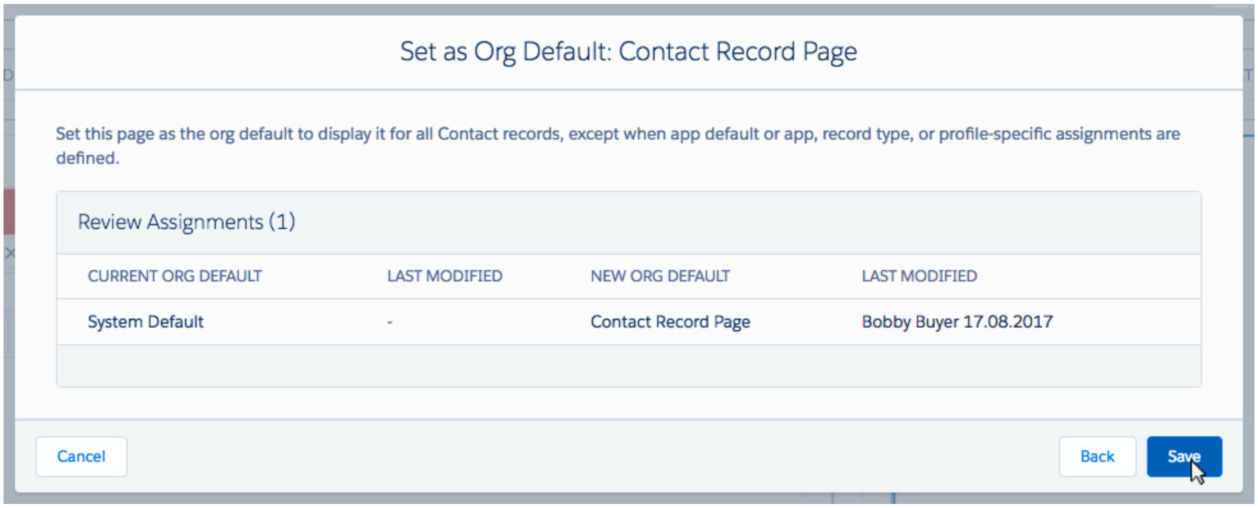
Click here to view the animation above in a web browser.

- **Click Save**.
- At the top of the page, **click Activation…**

- When prompted, **click Assign as Org Default**.



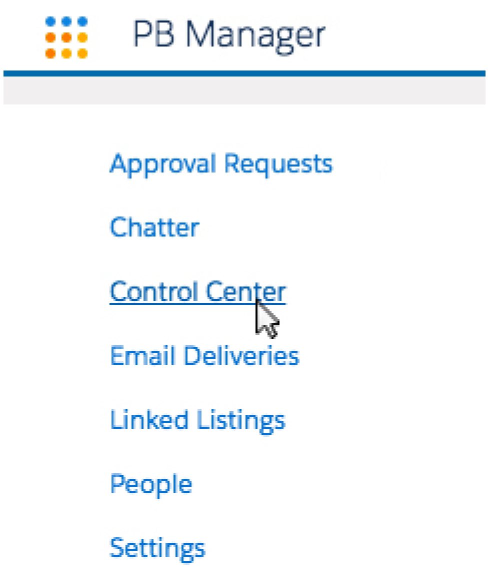
- On the next screen, **click Save**.



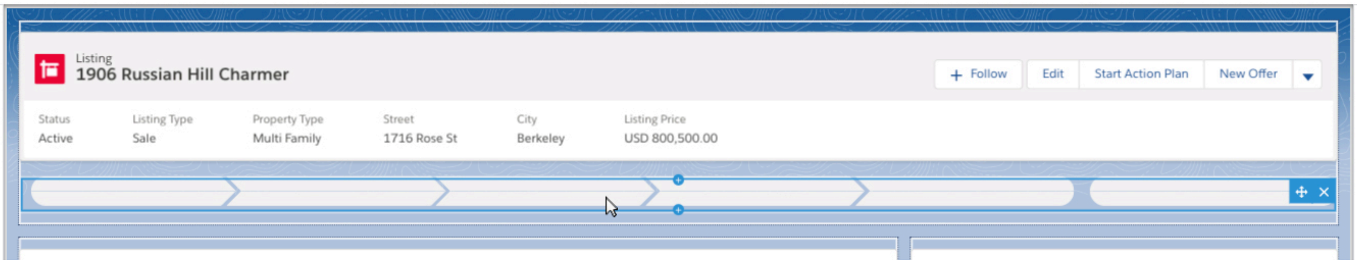
- **Click Save at the top of the page.**

- **Click Back** at the top of the page to return to the Home Page.

- **Click the app launcher** in the top left of the page and **select Control Center**.



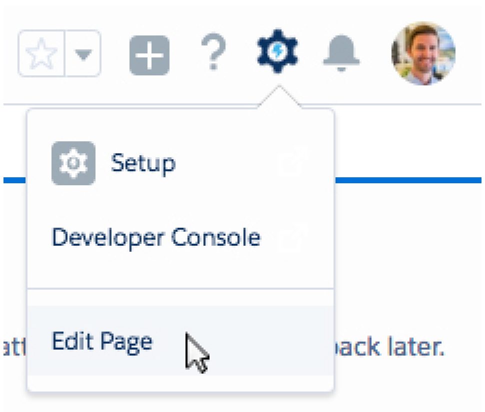
- On the next screen, **select Paths** from the available options.
- **Select the Stage option** in the dropdown for Contact Path.



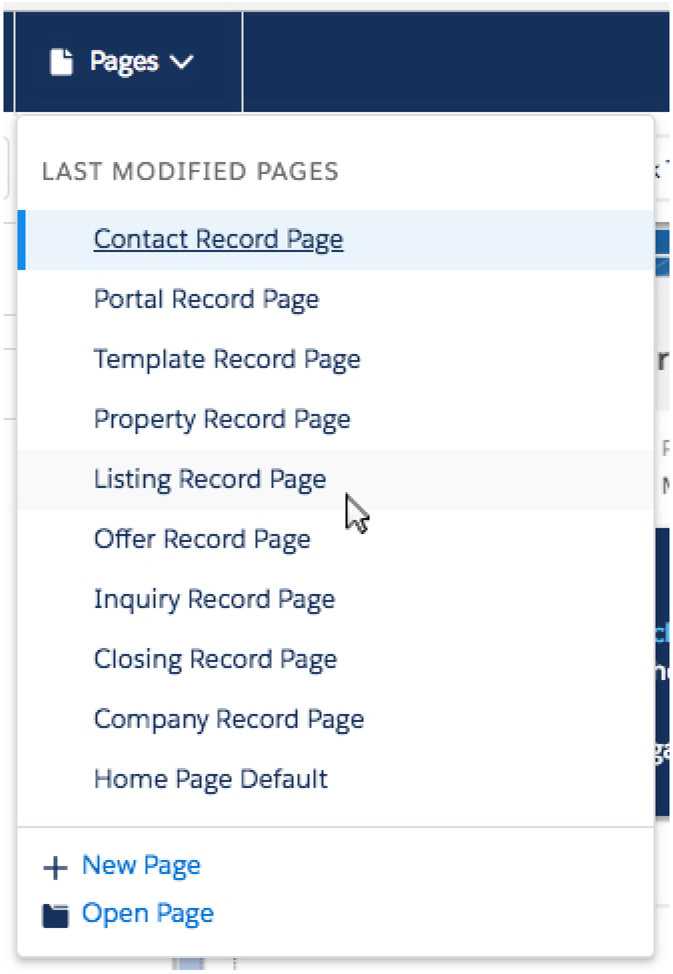
- **Click Save**.

12b: Configure the Listing Lightning Page

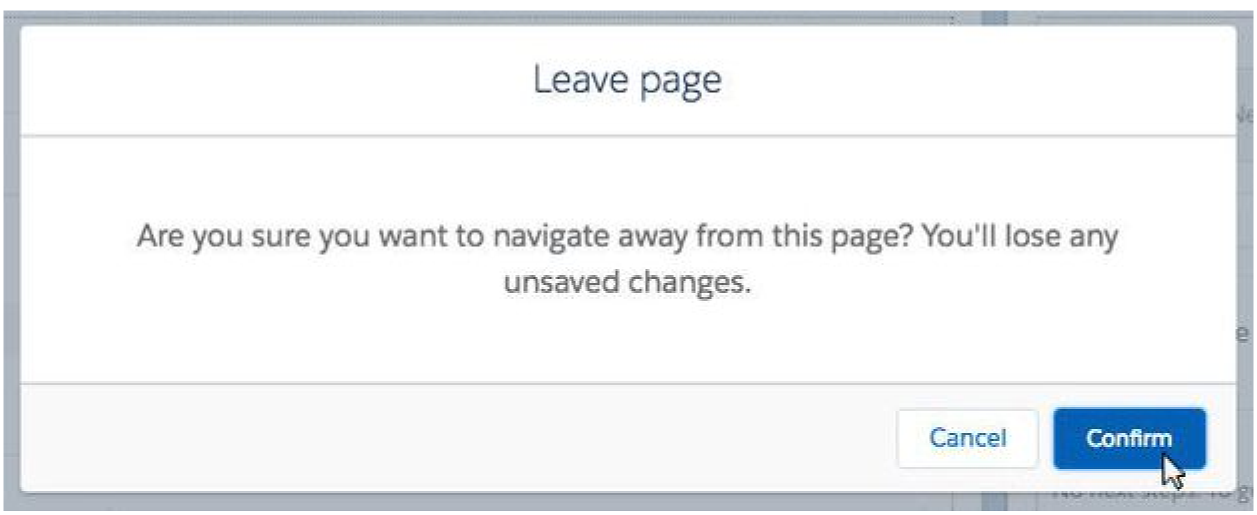
- **Open any Listing record**, then **click the gear icon** in the top right menu and **click Edit Page**.



- **Click the Pages dropdown** in the top left and then **select Listing Record Page**.



- When prompted to leave the page, **click Confirm**.



Note: It's important that you select both "Save" and "Activate" in the steps below, or you risk losing all configurations made in this section thus far.

- **Click Save at the top of the page.**

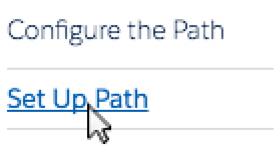
If prompted, **check Don't show me this message again**.

- At the top of the page, **click Activation…**
- When prompted, **click Assign as Org Default.**

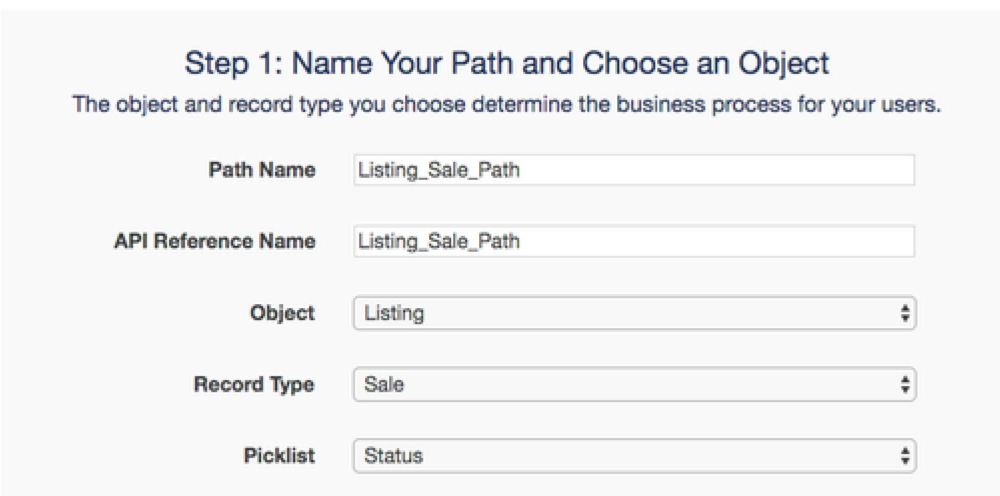
- **Click Activate** when prompted to Review Assignments.
- **Click Save at the top of the page.**

- Next, **click the Path component** as shown below.

- Inside the right column, **click the Set Up Path** link. (This will open a new window.)



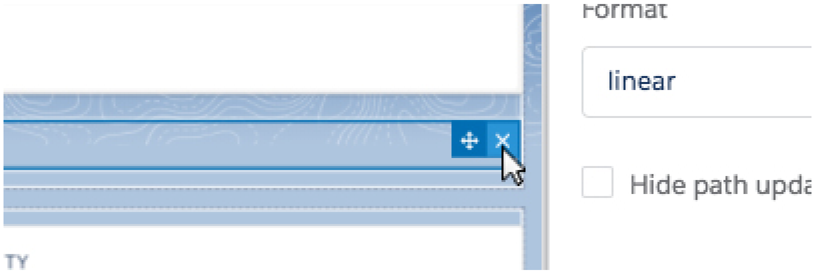
- On the following page, **click the green Enable button**.
- Then **click the blue New Path button**.
- **Add details for the new path** based on the image below.



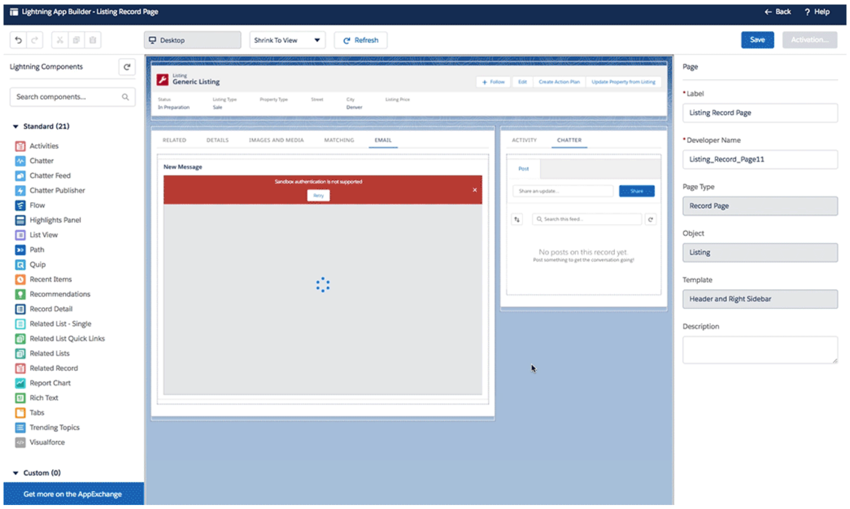
- **Click Next**.
- **Click Next again** (you do not need to modify anything on this page.)
- On the final page **select Active** and then **click Finish**.
- **Close the current window**.

Now that we have configured the Listing path, we need to remove it and then re-add it.

- **Click the blue "x"** to remove the path component from the page.



- Again, **drag a Path component** (under the left side Standard list) to the same location as before.



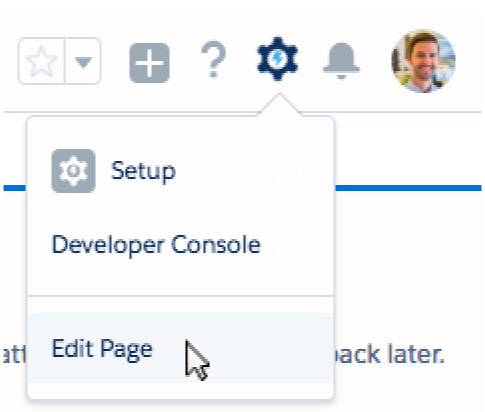
Click here to view the animation above in a web browser.

Voilà! This time, the path component automatically uses the Listing Path we just created.

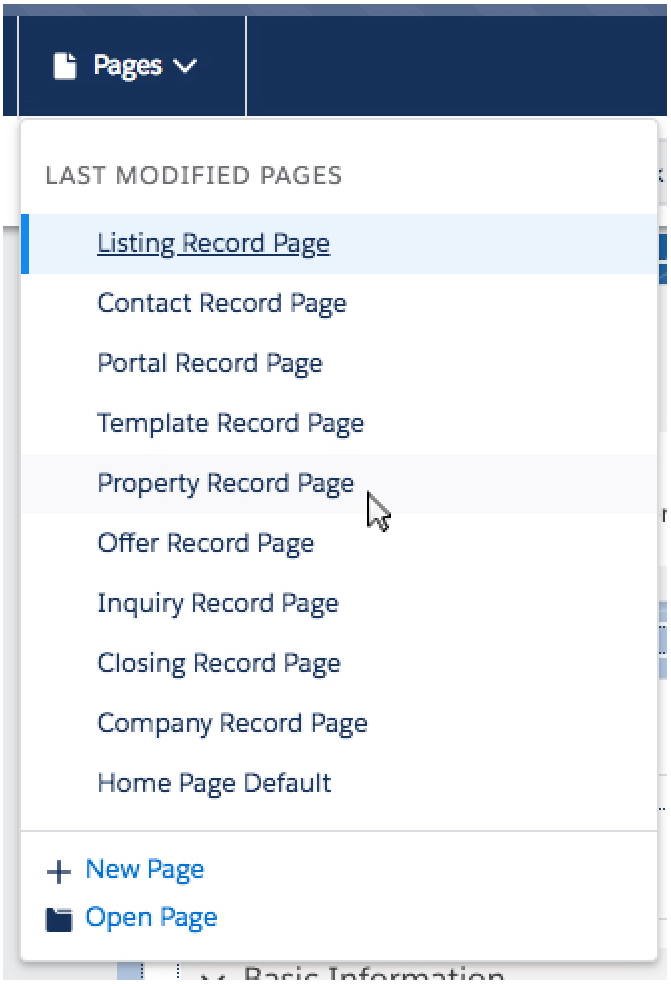
- **Click Save at the top of the page.**
- **Click Back** at the top of the page to return to the Listing record page.

12c: Configure the Property Lightning Page

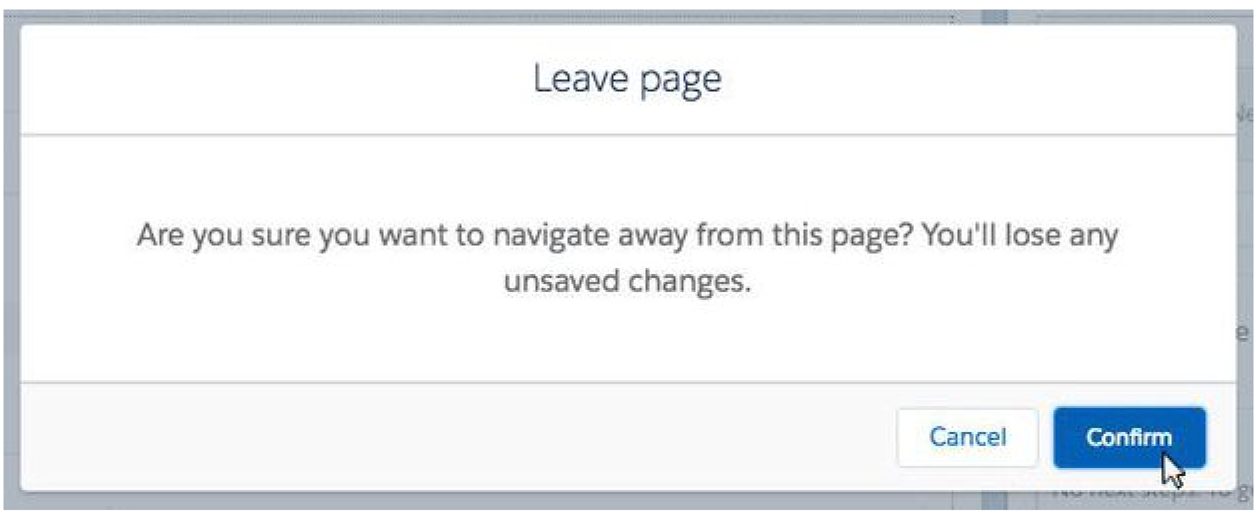
- **Open any Property record**, then **click the gear icon** in the top right menu and **click Edit Page**.



- **Click the Pages dropdown** in the top left and then **select Property Record Page**.

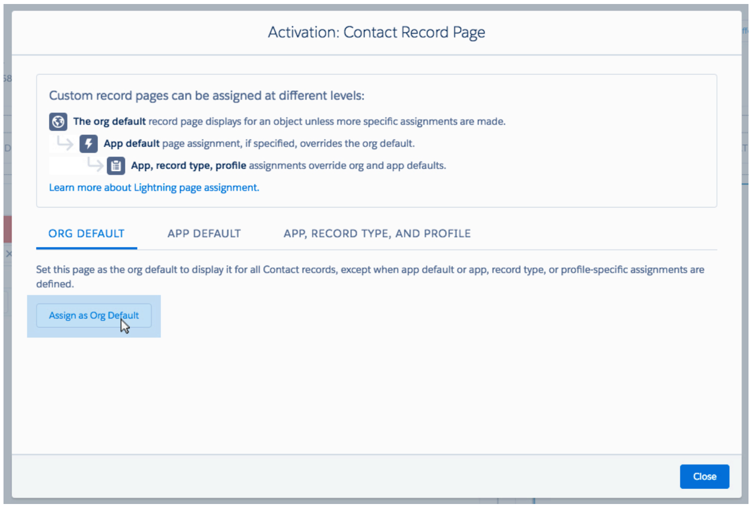


- When prompted to leave the page, **click Confirm**.

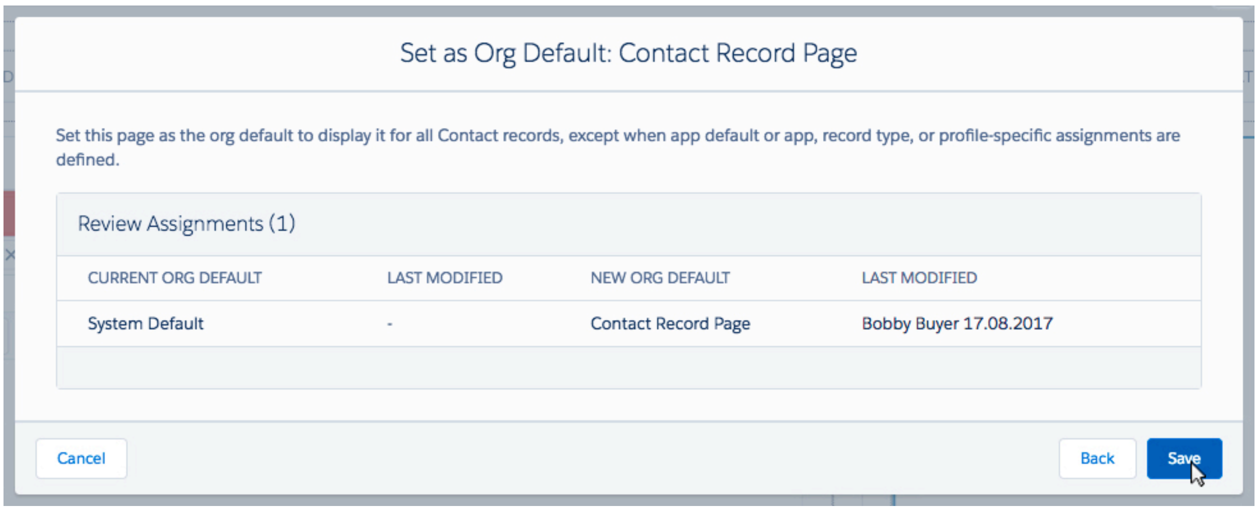


- **Click Save**.
- At the top of the page, **click Activation…**

- When prompted, **click Assign as Org Default**.



- On the next screen, **click Save**.

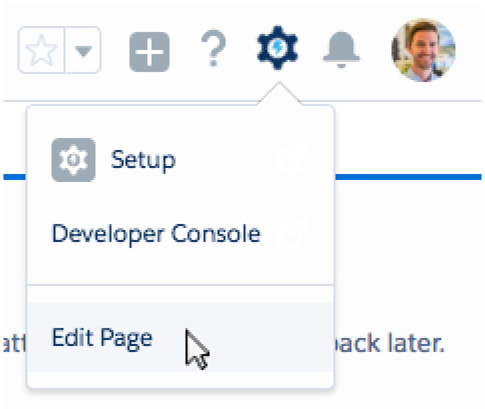


- **Click Save at the top of the page.**

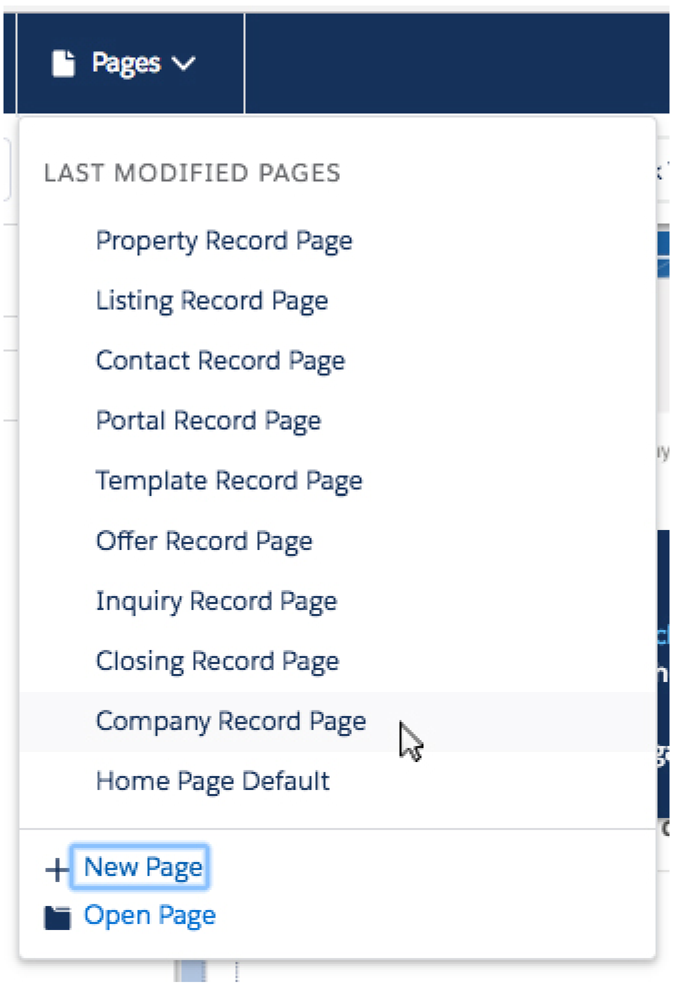
- **Click Back** at the top of the page to return to the Property record page.

12d: Configure the Company Lightning Page

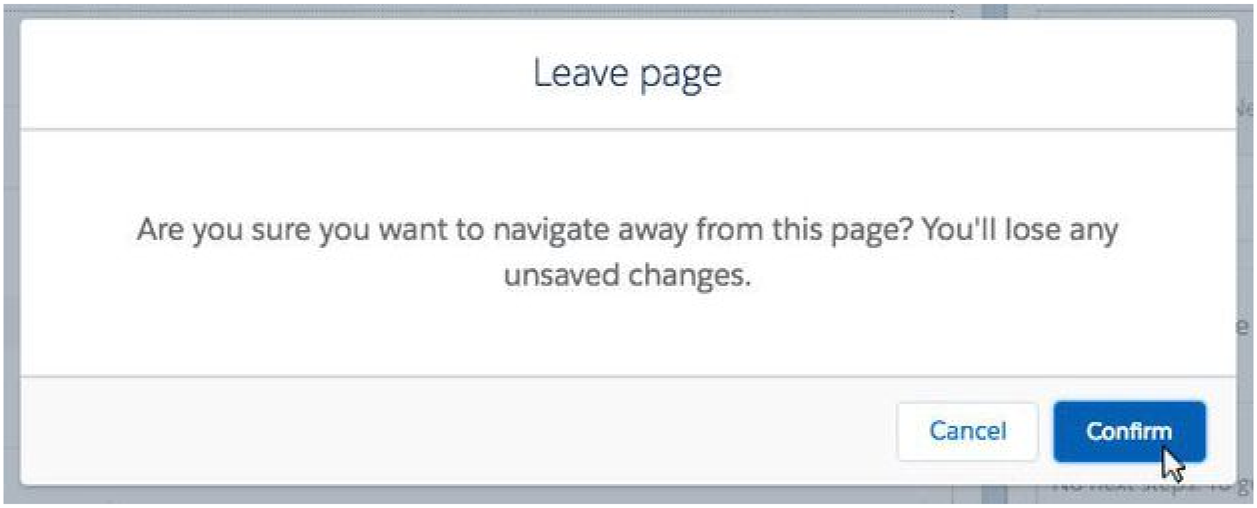
- **Open any Company record**, then **click the gear icon** in the top right menu and **click Edit Page**.



- **Click the Pages dropdown** in the top left and then **select Company Record Page**.

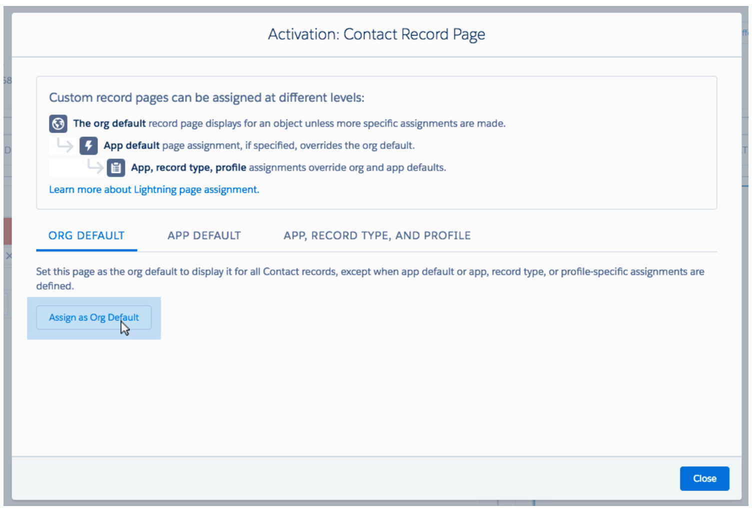


- When prompted to leave the page, **click Confirm**.

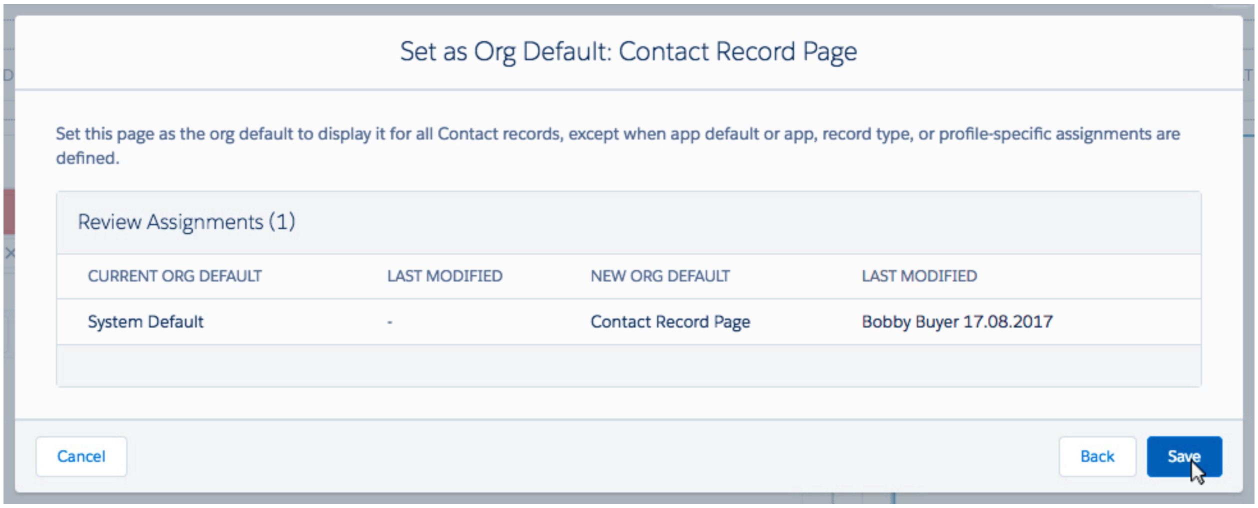


- **Click Save**.
- At the top of the page, **click Activation…**

- When prompted, **click Assign as Org Default**.



- On the next screen, **click Save**.

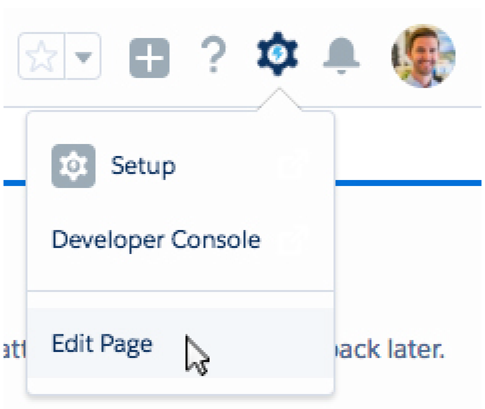


- **Click Save at the top of the page.**

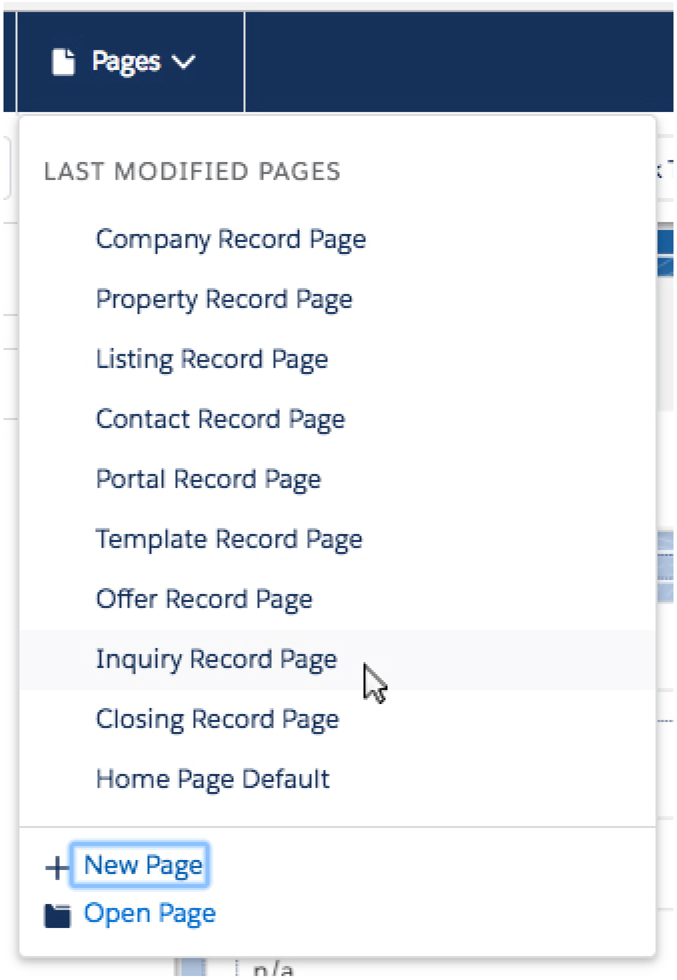
- **Click Back** at the top of the page to return to the Company record page.

12e: Configure the Inquiry Lightning Page

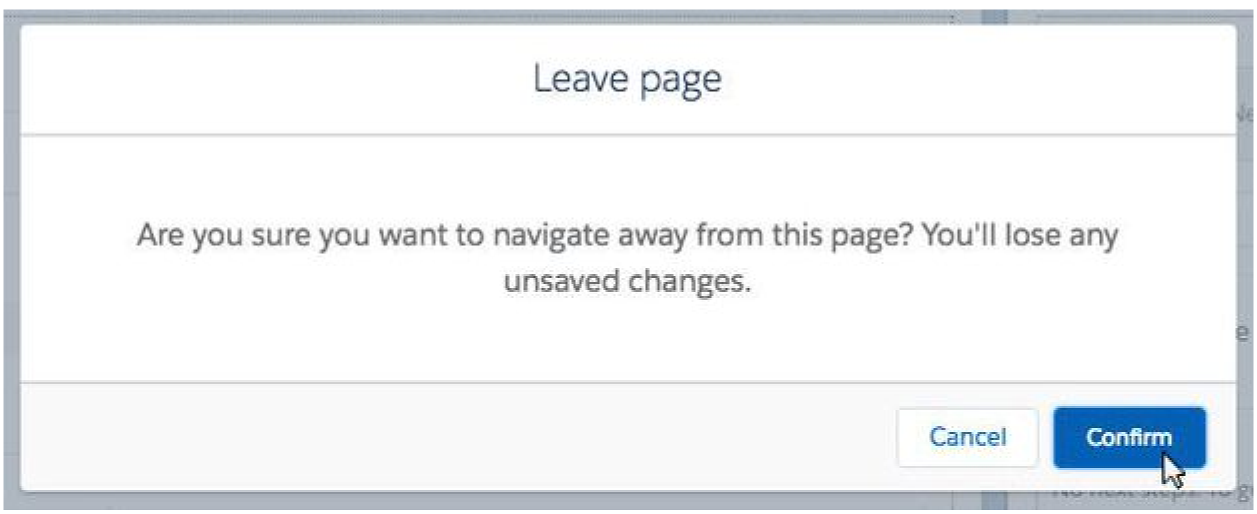
- **Open any Inquiry record**, then **click the gear icon** in the top right menu and **click Edit Page**.



- **Click the Pages dropdown** in the top left and then **select Inquiry Record Page**.

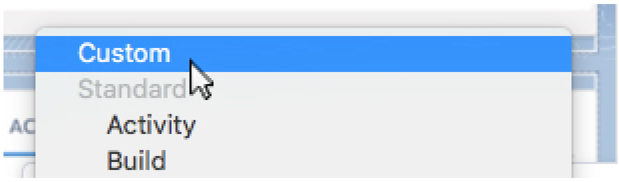


- When prompted to leave the page, **click Confirm**.

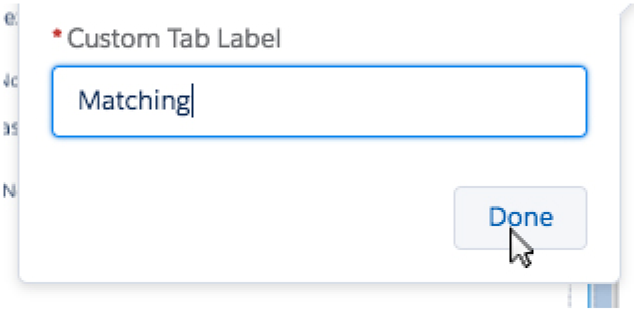


- Next, **click on the left tabs** (Related, Details).
- On the right side of the screen, under Page > Tabs, **click Add Tab**.

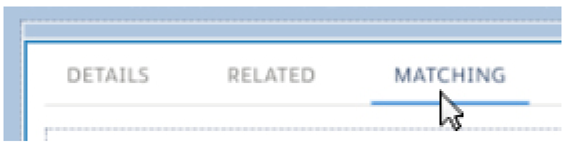
- **Click the new tab** and in the drop down that appears, **change the Tab Label from Details to Custom**.



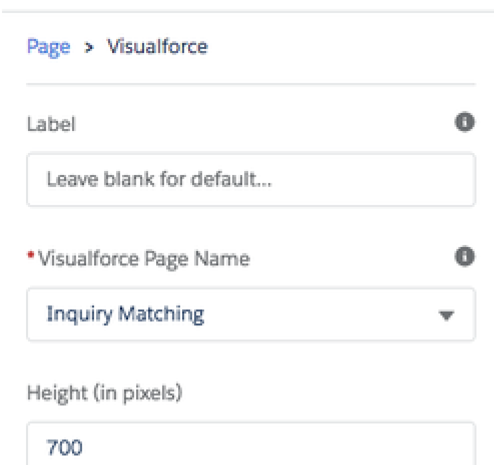
- A new textbox will appear, **type Matching**. **Click Done**.



- On the left side of the screen, **click the new Matching tab**.

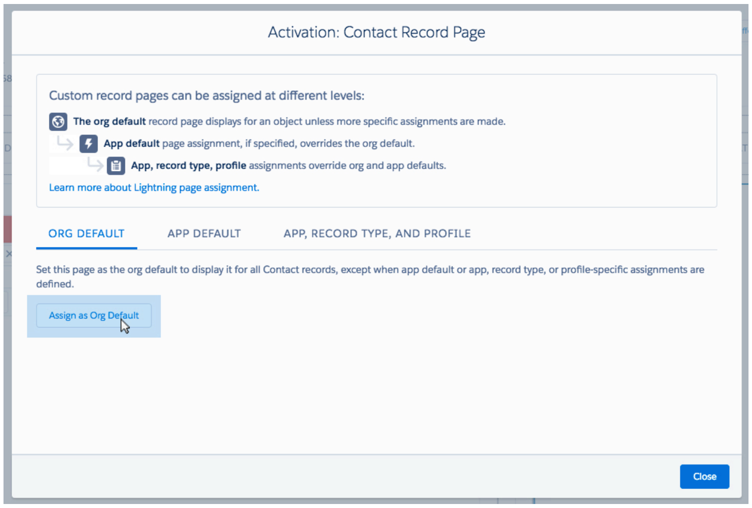


- **Drag a Visualforce component** (under the left side Standard list) **to where is says Add Component(s) Here**.
- Inside the right column, **enter the values for Label (blank), Visualforce Page Name and Height** as they appear in the screenshot below.

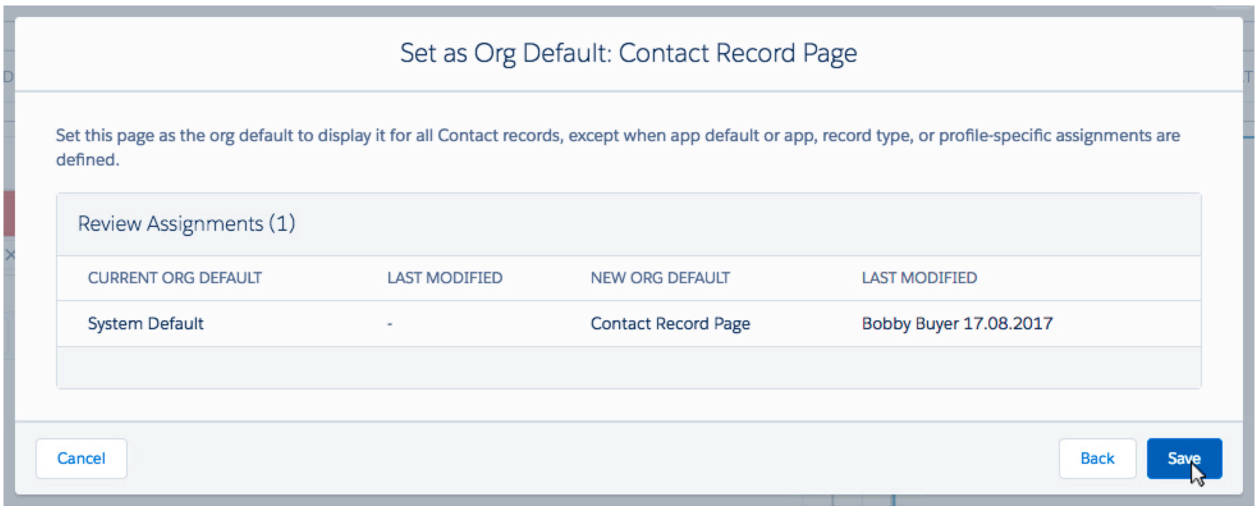


- **Click Save**.
- At the top of the page, **click Activation…**

- When prompted, **click Assign as Org Default**.



- On the next screen, **click Save**.



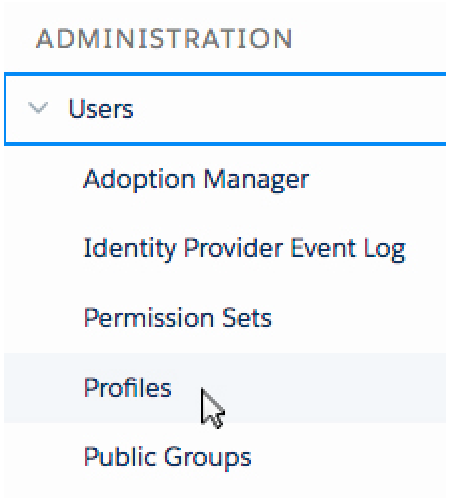
- **Click Save at the top of the page.**

- **Click Back** at the top of the page to return to the Inquiry record page.

Section 13: Check Permission Settings

Almost finished! Let’s double check permission settings for all Propertybase profiles.

- From the Setup page, on the left side of the screen, **click Profiles** under Users.



- **Click on PB Administrator.**
- Scroll down and **click Apex Class Access**.
- **Click Edit.**

Make sure all classes that start with ".pba" are enabled.

> Note: If you have third-party apps installed, ignore those. Only classes that start with ".pba" should be moved or modified.

- **Click Save.**
- **Click the arrow** next to Apex Class Acess.

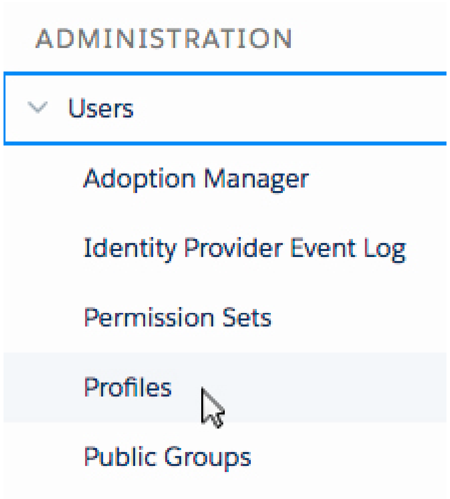
- In the drop down menu **click Visualforce Page Access**.

- **Click Edit.**

Make sure all classes that start with ".pba" are enabled.

> Note: If you have third-party apps installed, ignore those. Only classes that start with ".pba" should be moved or modified.

- **Click Save.**
- **Go back** to Profiles.



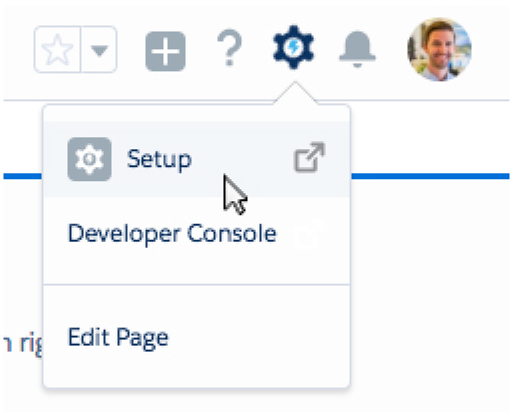
- **Repeat the steps above** for PB Agent, PB Readonly and PB Superuser. (As well as any custom profiles you have created.)

Section 14: Activate Default Processes

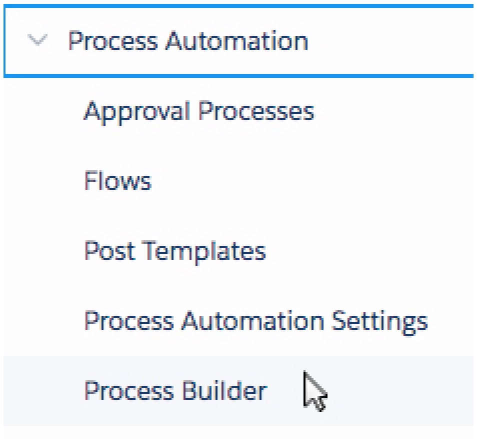
In this section we need to activate the processes that are included with all new Propertybase accounts. (These processes were imported into your account when you contacted Propertybase Migration Support in Section 10 of this document.)

14a: Activate "Automate Closing Status" Process

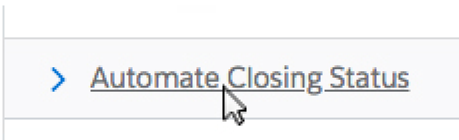
- **Click the gear icon** in the top right of the screen, then **click Setup**.



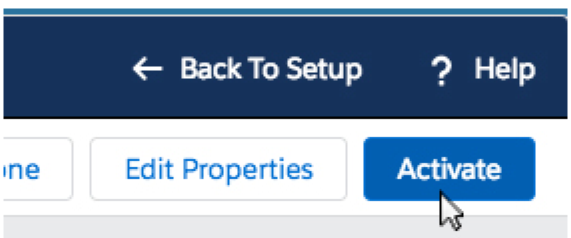
- In the setup menu, **click Process Builder** under Process Automation.



- **Select Automate Closing Status** in the list of available processes.



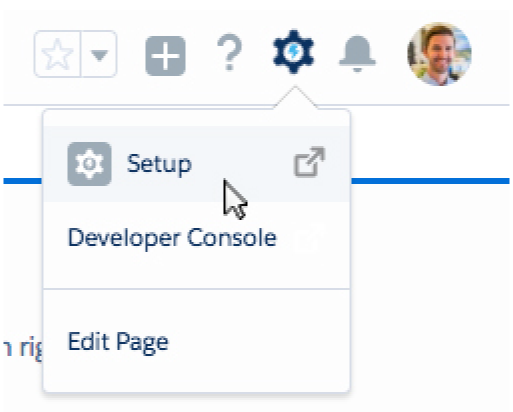
- **Click Activate** in the top right corner.



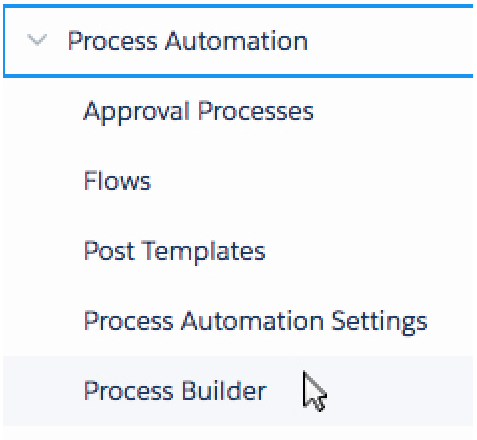
- **Click Confirm**.
- **Click View All Processes** to return to the Process Builder overview page.

14b: Activate "Automate Offer Status" Process

- **Click the gear icon** in the top right of the screen, then **click Setup**.

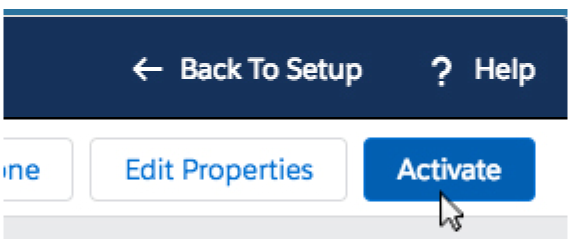


- In the setup menu, **click Process Builder** under Process Automation.



- **Select Automate Offer Status** in the list of available processes.

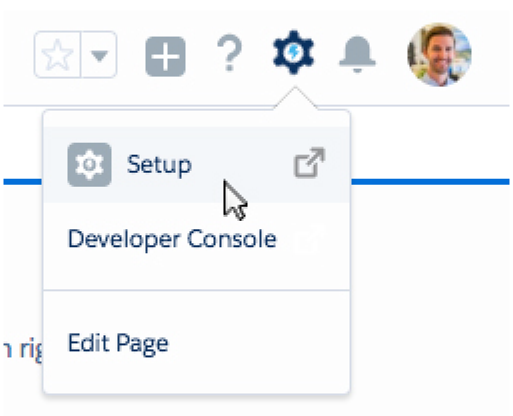
- **Click Activate** in the top right corner.



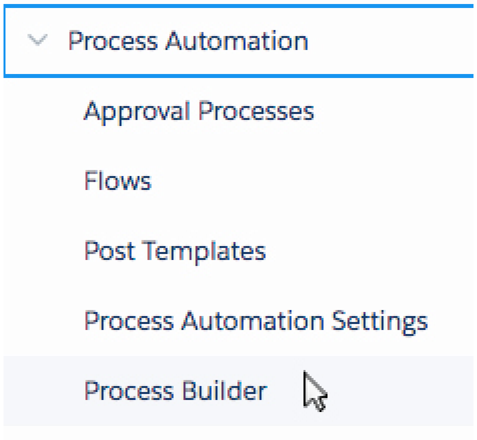
- **Click Confirm**.
- **Click View All Processes** to return to the Process Builder overview page.

14c: Activate "Close & Follow Up" Process

- **Click the gear icon** in the top right of the screen, then **click Setup**.

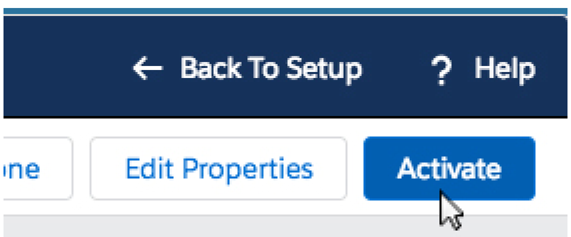


- In the setup menu, **click Process Builder** under Process Automation.



- **Select Quick Action - Activity - Close & Follow Up** in the list of available processes.

- **Click Activate** in the top right corner.



- **Click Confirm**.
- **Click View All Processes** to return to the Process Builder overview page.

For sandbox migrations: Continue with Section 15: Test Sandbox Environment.

For production migrations: Congratulations! You have finished the migration process!

Section 15: Test Sandbox Environment

In this next portion of the migration process, we need to test our sandbox account. There is no set criteria for testing your account. Simply click through your account, performing typical day-to-day actions as you normally would. If you have any third-party integrations, test the functionality of those as well.

Once you have determined that your sandbox accout is working as expected, you can continue onto the next section.

Section 16: Perform Migration in Production

Now that you have succesfully performed and tested the migration process in a sandbox environment. It is time to perform the entire migration process once more, this time in production. Please note, that while performing a migration in production **no users should be in the system and no data should be modified or changed until the migration is complete**. In other words, you should temporarily stop any and all activity for your Propertybase account while performing the migration.

IMPORTANT: Please note that when performing the migration a second time in production, you will begin with Section 2. In addition, you will skip Section 10 & 11 replacing them with Section 17. Once you have completed Section 17, you can continue the migration process as you normally would, with Section 12.

Section 17: Import Actions to Production

In this section, we will import Lightning actions from our sandbox account to our production account. This will save time and prevent the need to contact Propertybase a second time. To perform this import, we will enable a connection between our sandbox and production accounts and import the actions using change sets.

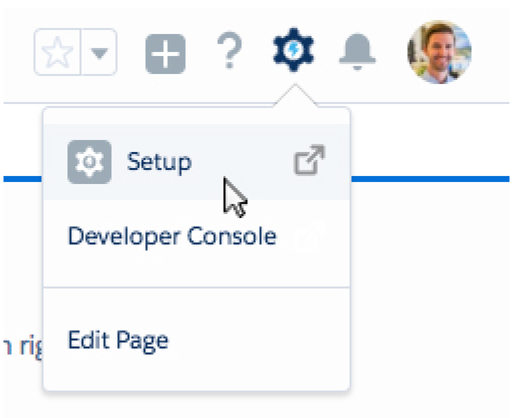
17a: Enable Sandbox Connection

Remember when Propertybase Support imported the new Lightning actions to your sandbox account? In this section we will use change sets (more on those in a minute) to import those same actions into your production account.

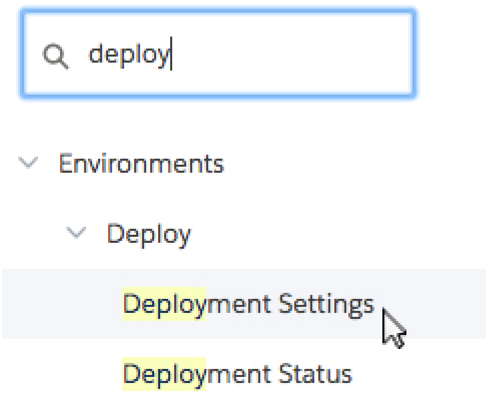
Before we can import a change set, we need to enable our production account to receive them. Follow the steps below to enable in-bound changes.

> Note: The following steps should be performed in your production account.

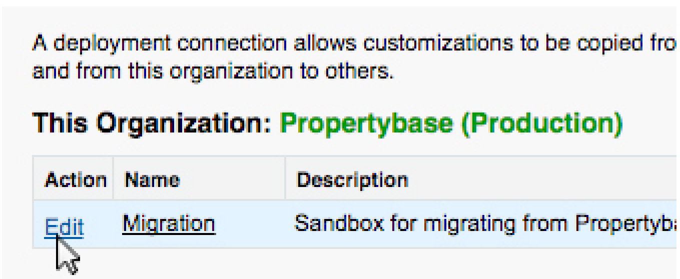
- **Click the gear icon** in the top right of the screen, then **click Setup**.



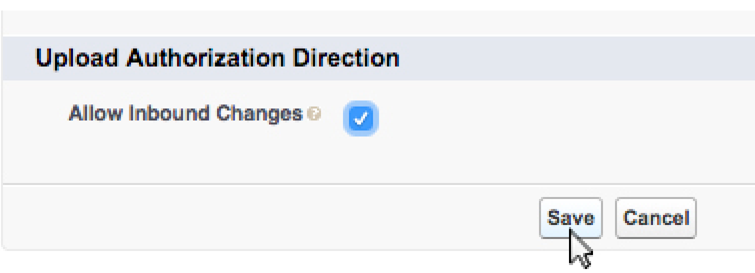
- **Click Deployment Settings** underneath Environments on the left side of the screen.



- **Click Edit** next to Migration (or the name of your sandbox environment, if different.)



- **Select Allow Inbound Changes** and then **click Save**.

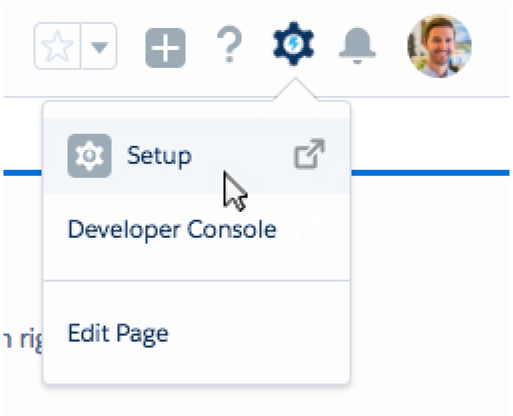


17b: Create Change Set

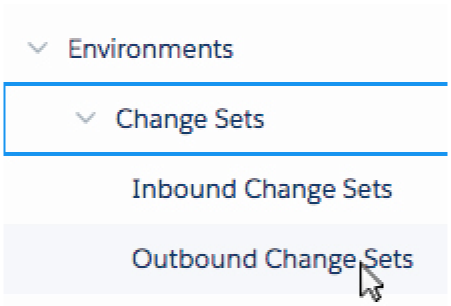
In this section, we are going to create the change set that will allow us to import Lightning actions from our sandbox account.

> Note: The following steps should be performed in your sandbox account.

- **Click the gear icon** in the top right of the screen, then **click Setup**.

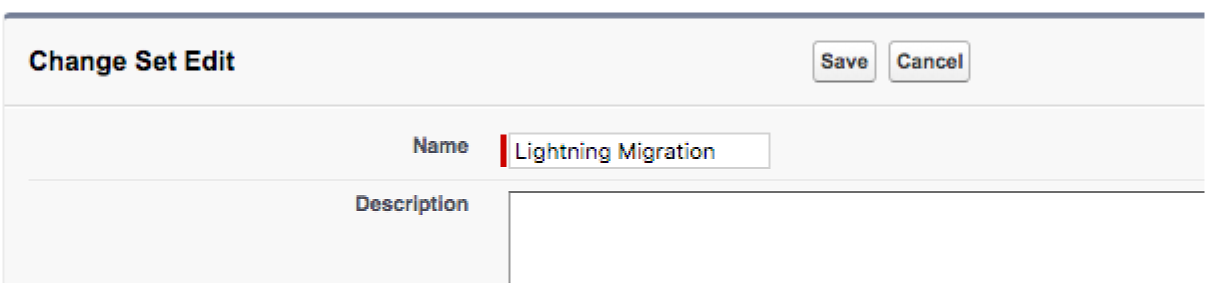


- Next, **click Outbound Change Sets** underneath Environments on the left side of the screen.



> Note: If you've never deployed a change set, you will be shown a screen that explains how they work. After reviewing this page, you can check the box at the bottom of the screen to hide this message when performing future change sets.

- **Click New**.
- **Enter a Name** for your change set.



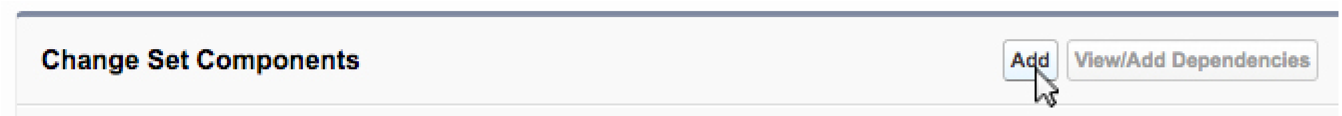
- **Click Save**.

17c: Add Change Set Components

Now that our change set has a name, we need to specify what to include.

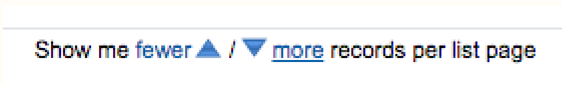
> Note: Slight variations, in the actions shown below, between your account and these screenshots are to be expected.

- **Click Add** next to Change Set Components.

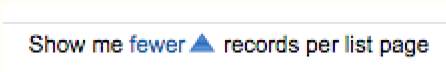


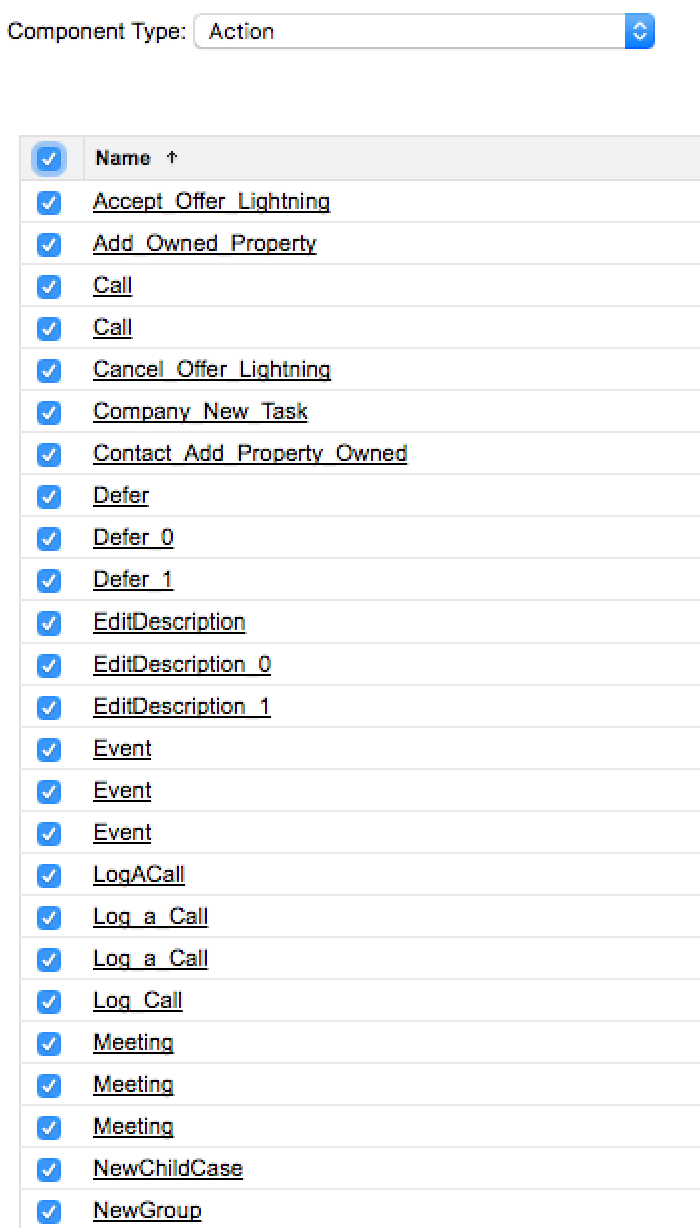
- **Select all entries** under Component Type: Action.

Note: Click "Show me more records per list page" at the bottom of the page until you are able to select all actions.



The "more" option will disappear when all entries are visiblie (as shown in the image below.)



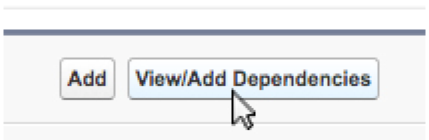


- **Click Add To Change Set** at the bottom of the screen.

17d: Deploy Change Set to Production

Now it's time to deploy our newly configured Lightning Migration account to our main Propertybase account.

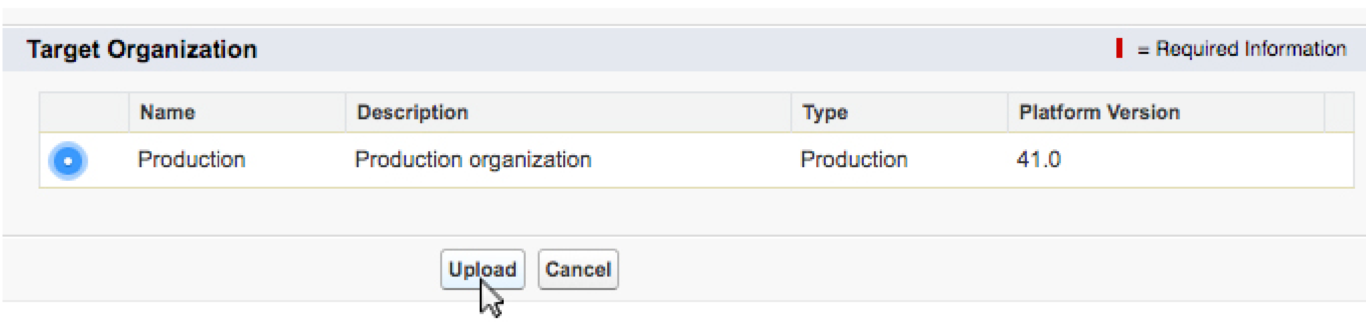
- **Click View/Add Dependencies**.



This will check to see if any of the actions in our change set are dependent on other components. If you discover any dependencies, add them to the change set.

> Note: You can safely ignore any "Managed package dependency" notifications.

- **Click Upload**.
- **Select the destination organization**.



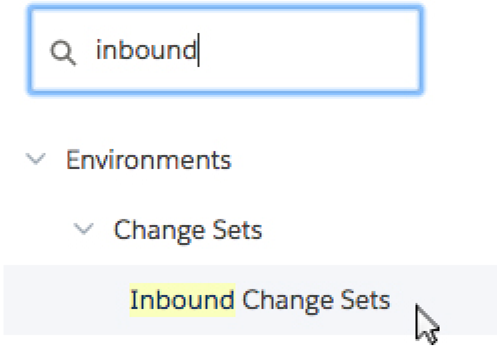
- **Click Upload**.

Once you have initiated, you will receive an email when the upload process is complete.

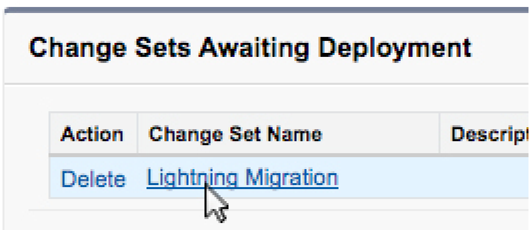
17e: Accept Change Set in Production

Once your outbound change set uploads successfully, it needs to be accepted in the production org.

- In your production org, **click Inbound Change Sets** underneath Environments on the left side of the screen.



- **Select the change set** under Awaiting Deployment.



- Next to View Details, **click Deploy**.

- Leave Default selected and **click Deploy** again.
- When prompted, **click Ok**.

> Note: Please continue with Section 11.

Section 18: Optional Features & Enhancements

Several new features have been introduced since the release of Propertybase Lightning. As with all new features, these are optional and free for all active Propertybase customers. Below is a list of those features - click the Help Center links to learn more.

One of the biggest benifits of migrating to Propertybase Lightning is having the ability to receive the latest features. In this section, you can choose to configure new features that have been released to Lightning customers. As with all new features, these are optional and free for all active Propertybase Lightning customers.

> Note: The following features and configurations should only be installed in a production environment.

Tracking Conversion Times with Contact Stages

- **Update to the latest version** if you haven't already. (https://update.propertybase.com)
- **Follow the article below** to add this functionality.

https://help.propertybase.com/hc/en-us/articles/115001947531

Automated Action Plans

- **Update to the latest version** if you haven't already. (https://update.propertybase.com)
- **Follow the article below** to add this functionality.

https://help.propertybase.com/hc/en-us/articles/115002504351

Drip Campaigns

- **Update to the latest version** if you haven't already. (https://update.propertybase.com)
- **Follow the article below** to add this functionality.

https://help.propertybase.com/hc/en-us/articles/115002642171

Appendix: Troubleshooting

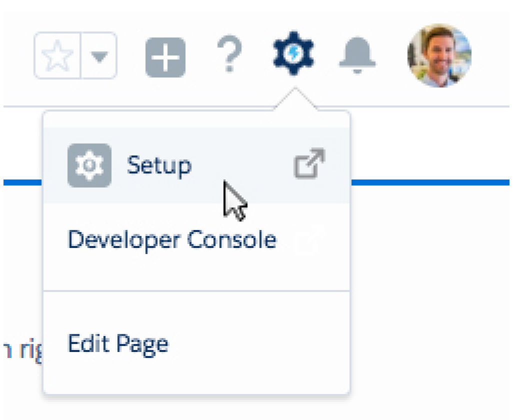
This section contains troubleshooting steps and solutions for various errors that may occur during the migration process.

> Note: These steps should only be followed if prompted to do so from an earlier section of this document.

A1: Cannot Update to Propertybase 1.414

The following steps should be followed if you receive an error when trying to update to Propertybase 1.414.

- **Click the gear icon** in the top right of the screen, then **click Setup**.

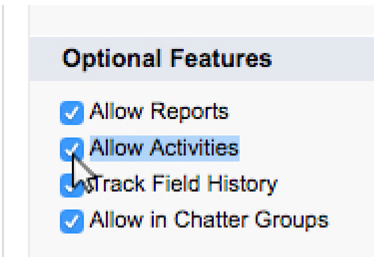


- **Click Object Manager** at the top of the screen.

- Scroll down and **click Listing**.

- **Click Edit** in the top right corner of the screen.

- Make sure that **Allow Activites is checked**.



- **Click Save** at the bottom of the screen.

Done! Try installing Propertybase 1.414 again and then continue with the migration process.

Glossary

A short collection of terms and phrases used throughout this documentation.

Org

This is short for "organization"; synonymous with "account".

Record

Records are a collection of fields, activities and relationships describing something, i.e. a person or an apartment.

Object

Objects are a collection of a particular type of records, i.e. Contacts or Listings. Objects can contain multiple record types.

Sandbox

A sandbox environment is an exact copy of your Propertybase account. A sandbox can be used to make and test new configurations before deploying them to production.

Production

A production environment (a.k.a. production account) is your normal Propertybase account.