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.

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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.

sandbox	0 Q
	Expand All Collapse All
Deploy	
Sandboxe	<u>s</u>

• Click the Sandbox Templates Tab.

	,	
Sandbox	es Sandbox Templates Sandbox History	
• Click	x New Sandbox Template.	
New Sa	Indbox Template	
• Ente	r a name for the Sandbox Template.	
ion		
Name escription	Migration	

-

• Click the checkbox next to Selected to select all objects.

Show All Show Selected
Selected
 ¹ 3 🖸

• Click Save.



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

• Click the Sandbox tab.



• Enter a name for your sandbox.

Sandbox Information		
Name	Migration	
Description	Sandbox for migrating from Propertybase classic to lightning.	

• Then click Next, under Partial.

Partial Copy
Refresh Interval: 5 Days
Capacity: 5 GB
Includes: • Configuration • Apex & Metadata • All Users • Records (sample of selected objects) • Sandbox Template Support
Available: 1 (0 in use)
Next

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

Select a Sandbox Template to use for creation of the new sandbox.



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

Sandbox Options	
Apex Class ⊘	
	Back Create Cancel

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.

s	My Profile My Settings	ın	
	Developer Console		
	Logout 😡		

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

name@example.com.migr	ation
Password	
Log	In
Log	In

• 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. **Bobby Buyer** Help & Training Propertybase Manager Setup • Click Get Started on the left side of the screen, next to the Lightning Experience Migration Assistant content box. $\gg 1$ Lightning Experience Migration Assistant Switch to the modern, intelligent Salesforce. Get Started Upgrade time! this built-in migration assistant will guide us through the next several steps. • Click Next Step, in the lower right corner. Next Step • 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 Step · Next we need to check your domain status. Click Set Up My Domain. My Domain Set Up My Domain Reflect your company's brand and increase Salesforce security with a custom domain. Tell Me More

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 "<u>Once You Have Registered My Domain</u>".

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.)

Your domain name is 160--migration.cs47.my.salesforce.com Your domain name is ready. Log in to test it out. Log in To test your new domain, click tabs and links. If you'vercustomized the UI, check for hard links to your original URL. 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.

News ① Give your reps instant access to timely, relevant news articles from US sources. (Available only in English.) Tell Me More	Enabled
Social Accounts, Contacts, and Leads Keep your users up to date by letting them link their accounts, contacts, and leads to Twitter profiles. Tell Me More	Enabled
Notes Let your users take better notes faster with the enhanced version of the Salesforce note-taking tool. Tell Me More	Enabled

• 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.

```
    Manage Users
    Users
    Adoption Manager
    Mass Email Users
    Roles
    Permission Sets
    Profiles
    Public Groups
    Queues
    Login History
    Identity Provider Event Log
    Identity Verification History
```

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

Del Clone <u>PB Administrator</u>

• Scroll down the page and click System Permissions.

System				
Settings that apply across all apps, such as record and user management Learn More		System Permissions Permissions to perform actions that apply across apps, such as "Modify All Data"		
		Desktop Client Access Permissions to access desktop clients, such as "Connect for Office"		
• Next, click Edit at the top of the page.				
System Permissions		Edit		
▼ System				
Permission Name	Enabled	d Description		
Access Chatter For SharePoint Scroll down the page and check the Lig	ghtning Experie	Allow users to acce		
Scroll down the page and check the Lig Lightning Experience User	Access Ligh	ence User option. ghtning Experience and switch between Lightning Experience and Salesforce Classic		
Scroll down the page and check the Lig Lightning Experience User	Access Ligh	ence User option.		
Scroll down the page and check the Lig Lightning Experience User Note: If you receive an error when saving	Access Ligh	ence User option. ghtning Experience and switch between Lightning Experience and Salesforce Classic		
Scroll down the page and check the Lig Lightning Experience User Note: If you receive an error when saving as well. See image below.	Access Ligh g permissions, the Create comm	ence User option. ghtning Experience and switch between Lightning Experience and Salesforce Classic hat means you need to check the "Create and Set Up Communities" permission munities, manage community-wide settings, membership, login and registration, branding, and associated Site.com site.		
Scroll down the page and check the Lig Lightning Experience User Note: If you receive an error when saving as well. See image below. Create and Set Up Communities	Access Ligh g permissions, the Create comm	ence User option. ghtning Experience and switch between Lightning Experience and Salesforce Classic hat means you need to check the "Create and Set Up Communities" permission munities, manage community-wide settings, membership, login and registration, branding, and associated Site.com site.		
Scroll down the page and check the Lighting Experience User Note: If you receive an error when saving as well. See image below. Create and Set Up Communities To save your changes, scroll to the top of the save of t	Access Ligh g permissions, the Create comm	ence User option. ghtning Experience and switch between Lightning Experience and Salesforce Classic hat means you need to check the "Create and Set Up Communities" permission munities, manage community-wide settings, membership, login and registration, branding, and associated Site.com site. click Save.		
 Scroll down the page and check the Lighting Experience User Note: If you receive an error when saving as well. See image below. Create and Set Up Communities To save your changes, scroll to the top of System Permissions 	Access Light g permissions, the Create common of the page and c	ence User option. ghtning Experience and switch between Lightning Experience and Salesforce Classic hat means you need to check the "Create and Set Up Communities" permission munities, manage community-wide settings, membership, login and registration, branding, and associated Site.com site. 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.



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

5	Switch	to L	ightr	ing	Experience
1				20	

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.

G	A	Secure	https://bobbybuyer.lightning.force.c	com
r	bob	bybuyer.lig	htning.force.com wants to	Tre
	۰	Show not	ifications	h S
Ρ			Block Allow	sks

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.



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.



• 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.

	🖅 🗄 ? 🏟 J	P 🌘
	Setup 🗹	
	Developer Console	
n riş	Edit Page	

• 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.

списа свинд	podratoritee
Listing	pbaListingc
On the left side of the screen, click Page	Layouts.
Details	
Fields & Relationships	

.

Page Layouts

Lightning Record Pages

Buttons,	Links,	and /	Acti	ions
----------	--------	-------	------	------

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.

Rent	Bobby Buyer, 8/3/2017, 10:05 PM	Bobby Buyer, 8/3/2017, 10:05 PM
 Scroll down the page and de Remove icon in the top right of ListingCoverflow ListingMediaOverview MapsListing 	corner of the component.)	ents. (The component can be deleted by clicking the
New Section (Header not visible)		
ListingMed	liaOverview	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.

Rent -			
Save -	Quick Save	Preview As •	Cancel
-13-			

• 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.

Details		
Fields & Relationships		
Page Layouts		
ہم Lightning Record Pages		
Buttons, Links, and Actions		
You should see Building / Masterproperty, Project page layouts prior to this migration, you will want to		ler page layouts by default. If you have created custom
Note: Not all accounts will have the Buildir Property page layout (it is the only mandat		ayouts. If you don't have those, simply update the
Click Building / Masterproperty under F	⁵ age Layouts.	
Rent Bobby	y Buyer, 8/3/2017, 10:05 PM	Bobby Buyer, 8/3/2017, 10:05 PM
 Scroll down the page and delete the fol Remove icon in the top right corner of the MapsProperty ImageManager PropertyMediaOverview Portals (non-US only) 		ts. (The component can be deleted by clicking the
Section (Header not visible)		
PropertyMediaOverview	Remove	MapsProperty

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.

Request	pbaRequestc
• On the left side of the screen, click Page Layouts .	

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions	Buttons,	Links.	and	Act	ions
-----------------------------	----------	--------	-----	-----	------

2

- 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.

Save - Quick Save Preview A	s Vindo 🖉 Rec	a Eayout Properties				
Quick Actions Mobile & Lightning Actions Expanded Lookups Related Lists Report Charts Visualforce Pages	Q Quick Find Page Name	*				
Lot Size - min 22.		No. Contraction	64	Lot Size - max 485.07		
System Information (Header v Created By St	mple User			Last Modified By Sample User		
Mobile Cards (Salesforce	mobile only) 🚺					
Drag expanded lookups and m	obile-enabled Visualforce pages here	to display them as mobile ca	ards.			
Related Lists						
Linked Listings						
Linked Listing: Linked Listing IC	Listing: Title	Listing: Address	Linked Listing: ***	Linked Listing: Last Client Feedback	Linked Listing: Last Sent On	Linked Listing: Last Modified Date
Sample Linked Listing: Linked	Listing ID Sample Listing: Title	Sample Listing: Address	Sample Linked Listing: ***	Sample Linked Listing: Last Client Feedback	1/29/2018 10:43 AM	1/29/2018 10:43 AM
Open Activities		New Task New Event				
Subject	Name	Task Due De	ite	Status	Priority	Assigned To

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.

Setup	•	Home	Object Manager	~
		2	(二刀版・刀モ	[[]];

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

Q label
✓ User Interface
Custom Labels
Rename Tabs and Labels
اری Didn't find what you were looking for? Search all of Setup instead.

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

Edit	Hecommendations	
Edit	📥 Requests	
Edit	- Settings	

• Rename Requests based on the image below.

Tab Language	Inquiries English
Record Name	Inquiry ID
Singular	Inquiry
Plural	Inquiries
Starts with vowel sound	

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=04t0B00000kfBa
```

• 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.

https://bobbybuyer.lightning.force.com/packaging/installPackage.apexp?p0=04t0B000000kfBa

- 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 h	ave 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.

Uninstall Manage Licenses	Propertybase V3	Propertybase	1.414
	-		

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.

Changelog Resources Integrations

Import Action Plan Templates

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

	\checkmark	Import Action Plan Templa	tes
To get started v	vith our new Ac	tion Plan feature we provide you with a co	uple of Action Plan
Templates!			
Please click on	Execute updat	e, to install the new Action Plan Templates	listed below into your
	Contraction of the second s	xisting Action Plan Templates remain uncha	
Action Plan Te	mplates		
Active Clos	ing Action Plan	6	
	Seller) Action P		
 New Client 	(Seller) Action	Plan	
 New Lead (Buyer) Action F	Plan	
 New Client 	(Buyer) Action	Plan	
 New Listing 	Action Plan		
Offer Actio	n Plan		
Cancel			Execute Update
Cancer			Execute Opuate
_			15

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

Today's Events Today		
Looks like you're free and clear the rest of the day.	y's Tasks III ▼ Nothing due today-go grab a coffee while there's still time.	
View Calendar		

• 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.

Page > Visualforce

Label	0
Login	
* Visualforce Page Name	0
Login	•
Height (in pixels)	

310			

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.

🖬 Lightning App Builder - Home Page Def	ault			← Back ? Help
5 C X B B	Desktop Shrink To View	C Refresh		Save Activation
Lightning Components C ⁴	DIELS ADIEL	<u>. aous ao</u>	Login	Page
Search components Q			SYSTEM STATUS Not connected to Propertybase services	• Label
Flow	120%/SIC3.770%/SIC5.		Sandbox authentication is not supported X	Home Page Default
Items to Approve	Today's Events Looks like you're free and clear the rest of the day.	Today's Tasks III v Nothing due today-go grab a coffee while there's still time.	Convect	Developer Name
 List View News 	View Calendar		FOR SUPPORT, PLEASE VISIT: Propertybase Help Center	Home_Page_Default
Performance			l	Page Type
Quip				Home Page
Recent Items Recent Records				
Recommendations				Template
Report Chart				Standard Home Page
Rich Text				Description
📋 Today's Events				
1 Today's Tasks				
100 Deals				
Trending Topics				
Visualforce				
▼ Custom (0)	*			
No components available.				
 Custom - Managed (2) 				
List Widget				
2 Quickstart				
Get more on the AppExchange avascriptivoid(0);				

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.

Page > Dashboard	
* Dashboard	0
Company Performance Dashb	oard (Comp.
Max Height	0
850	
Hide on Error	0

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

I lightning App Builder - Home Page Default ← Back ? Help							
5 C X 8 8	Desktop Shi	rink To View 🛛 🔻	C Refresh				Save Activation
Lightning Components C ⁴		<u>e</u>			G	Login	Page
Search components Q	property base^O	New Contact New I		A New Lord		SYSTEM STATUS Not connected to Propertybase services	•Label
▼ Standard (21)	Company Performance Das	shboard		Op	en Refresh	Sandbox authentication is not supported X	Home Page Default
App Launcher	As of Jan 24, 2018 10:28 AM Viewing as Chri	a Stauffer				Course 1	Developer Name
R Assistant	Company Sales X			Company Pipeline	ж	FOR SUPPORT, PLEASE VISIT	Home_Page_Default
Chatter Feed	Goal Tracker			Open Offers		Propertybase Help Center	
Chatter Publisher	A CONTRACTOR OF A CONTRACTOR OFTA CONTRACTOR O						Page Type
O Dashboard	16 64						Home Page
Flow							
🛃 Items to Approve	0			No Data			Template
List View	(0 to 1w)						Standard Home Page
News							
Performance	Vee Report			View Report			Description
R Quip	Company Contacts 11			Company Offers	20		
Recent Items	By Stage			By Status			
Recent Records							
Recommendations							
Report Chart	No data.			No data.			
11 Rich Text							
Today's Events							
🖆 Today's Tasks							
1 Top Deals	Vee Report			View Report			
Trending Topics							
Visualforce	Today's Events		Today's Tasks	÷	a the second sec		
	Looks like you're free and clear the res	it of the day.		🕁 day-go grab a coffee while them	r's still time.		
▼ Custom (0)							
Get more on the AppExchange	View Calendar			0			

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.

☐ Lightning App Builder - Home Page Default					
5 C X B 8	Desktop	rink To View 🔻 🥑 Cf. Refresh			Save Activation
Lightning Components C ⁴		<u>(</u>) () (2)	0 0	Login	Page > Today's Events
Search components Q	propertybase ^C	New Contact New Inquiry New Ter		SYSTEM STATUS Not connected to Propertybase services	This component has no properties.
✓ Standard (21)	Company Performance Da As of Jan 24, 2018 10.28 AM Viewing as Ch		Open Refran	Sandbox authentication is not supported	
App Launcher				Covert	
Assistant	Company Sales %		Company Pipeline X	FOR SUPPORT, PLEASE VISIT: Propertybase Help Center	
Chatter Feed	Goal Tracker		Open Offers		
Chatter Publisher	120 A.N			Today's Tasks 🖉 🔻	
O Dashboard	160 600			Nothing due today-go grab a coffee while there's still time.	
Flow			No Data		
Items to Approve	0 (0 to 1m)			Today's Events	
List View				Looks like you're free and clear the rest of the day.	
 News Performance 	View Report		Vew Report		
Quip				View Calendar	
Recent Items	Company Contacts 24 By Stage		Company Offers X By Status	•	
Recent Records					
Recommendations					
Report Chart					
11 Rich Text	No data.		No data.		
Today's Events					
🔚 Today's Tasks					
Top Deals	View Report		View Report		
Trending Topics		0			
Visualforce					
	Add Component(s) Her		Add Component(s) Here		
 Custom (0) 					
Get more on the AppExchange					

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.

🖬 Lightning App Builder - Home Page De	fault				← Back ? Help
5 C × B B	Desktop Shri	nk To View 🔻 🥑 Refresh	1		Save Activation
Lightning Components	DASHBOARD Company Performance Dash As of Jan 24, 2018 1028 AM Viewing as Chris I	aboard	Open Refron	Sampton, suffernitization is not supported X	Page
Search components Q	CONSCIENCE IN	E Maria C		Connect	*Label
	Company Sales X Coal Tracker		Company Pipeline H	FOR SUPPORT, PLEASE VISIT: Propertybase Help Center	Home Page Default
App Launcher	Under Harrison		Open Oners	The second s	
S Assistant	120 KW			Today's Tasks 🖉 🔻	* Developer Name
Chatter Feed	16			Nothing due today-go grab a coffee while there's still time.	Home_Page_Default
Chatter Publisher			No Data		
O Dashboard	0 (0 to 1w)			Today's Events	Page Type
Flow				Looks like you're free and clear the rest of the day.	Home Page
Items to Approve	Vew Report		Vew Report		
List View				View Calendar	Template
News	Company Contacts X By Stage		Company Offers # By Status		Standard Home Page
Performance					
🖪 Quip					Description
Recent Items					
Recent Records	No data.		No data.		
Recommendations					
🧭 Report Chart					
Rich Text	Vew Report		Vew Report		
Today's Events		0			
10 Today's Tasks	Recent Records				
📶 Top Deals	Company Performance Dashboard		Add Component(s) Here		
Trending Topics	-				
Visualforce	Campaign Return on Investment				
	MebsenviceListingsQuery_token				
 Custom (0) 	offer_fieldbillinting				
No components available.					
Get more on the AppExchange	effer_fieldIdContact				

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.

Page > List View

Too many List View components on one page can cause page performance issues. Use them sparingly.

* Object	
Listing	•
* Filter	0
Active Listings	•
Number of Records to Display	
3	

Hide list view action bar

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

0



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.

Page > List View

Too many List View components on one page can cause page performance issues. Use them sparingly.

Object

Contact	•
* Filter	0
Recently Viewed Contacts	•
Number of Records to Display	
4	
Hide list view action bar	0

Click Save at the top of the page.



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

-	Page Saved
	Activate this page to make it visible to your users. Activate the page now, or do it later using the Activation button in the App Builder toolbar.
-	Don't show me this message again Not Yet Activate

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

r	Activate Home Page Default
e	Set this page as the default Home page or assign it to specific profiles. Users see the default Home page unless they're assigned to profiles with ac- cess to a different Home page.
rr	 Set this page as the default Home page Assign this Home page to specific profiles
ar.	Cancel

• Finally, click Activate when prompted to Review Assignments.

Review Assignments					
Users see the default Home page unless they're assigned to profiles with a different Home page.					
Review Assignments (1)				
CURRENT DEFAULT	LAST MODIFIED	NEW DEFAULT	LAST MODIFIED		
System Default		Home Page Default	Bobby Buyer 16.08.2017		
ancel			Back		

• 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.

SYSTEM STATUS

Connected to Propertybase services

Refresh connection

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.

	🐨 🗄 ? 🏟 I	P 🌘
_	Setup Console	
n riş	Edit Page	

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

PLATFORM TOOLS	
∨ Apps	
App Manager 🛛 🔓	
AppExchange Marketplace	
• Sort by App Type.	

		V
لک Connected (Managed)	Арр Туре	

- 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.

Upgrade My Custom App to Lightning
 Upgrade your Classic app to take advantage of Lightning Experience features like enhanced app branding.
This action creates a Lightning app version of the Classic app. The original Classic app isn't affect- field. If a profile exceeds the number of allowed apps, it isn't assigned to the Lightning app version.
*App Name 🕦
Propertybase Agent Lightning
f Developer Name 🚯
PB_Agent_Lightning
Cancel

7b: Configure Application Profile Visibility

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

Edit

ADMINISTRATION	
✓ Users	
Adoption Manager	
Identity Provider Event Log	
Permission Sets	
Profiles	
Public Groups	
 Click on PB Administrator. Scroll down and click Assigned Apps To the right of the Assigned Apps head 	

Assigned Apps

App Name



Assigned Apps Save Ca	ancel	
App Name	Visible	Default
Community (standardCommunity)		0
Content (standardContent)		0
Data Assessment (standard_DataAssessment)		0
Marketing (standard_Marketing)		0
Propertybase Admin (pba_Propertybase_Admin_Lightning)		0
Propertybase Admin (Propertybase_Admin)		0
Propertybase Admin Lightning (Propertybase_Admin_Lightning)	\checkmark	0
Propertybase Agent (PB_Agent)		0
Propertybase Agent (pbaPropertybase_Agent_Lightning)		0
Propertybase Agent Lightning (PB_Agent_Lightning)	 ✓ 	0
Propertybase Manager (pba_Propertybase)		0
Sales (standardLightningSales)		0
Sales (standardSales)		0
Sales Console (standard_LightningSalesConsole)		0
Salesforce Chatter (standard_Chatter)		0
Sample Console (standard_ServiceConsole)		0
Service (standardService)		0
Service Console (standard_LightningService)		0

Click Save.

• Return to the main Profiles screen.

ADMINISTRATION

~ 1	Users	
	03013	

Adoption Manager

Identity Provider Event Log

Permission Sets

Profiles 3

Public Groups

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

Assigned Apps

App Name

• Assign visibility to match the image below.



Assigned Apps	Save		
App Name		Visible	Default
Propertybase Admin (pba_Propertybase_Admin_Lightning)			0
Propertybase Admin (Propertybase_Admin)			0
Propertybase Admin Lightning (Propertybase_Admin_Lightning)			0
Propertybase Agent (PB_Agent)			0
Propertybase Agent (pba_Propertybase_Agent_Lightning)			0
Propertybase Agent Lightning (PB_Agent_Lightning)		\checkmark	0
Propertybase Manager (pba_Propertybase)			0

• Click Save.

• Return to the main Profiles screen.

ADMINISTRATION

	 -	-	-
~	 ~	Р	rs

Adoption Manager

Identity Provider Event Log

Permission Sets

2

Profiles

Public Groups

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

Assigned Apps

App Name

• Assign visibility to match the image below.

Assigned Apps	Save	
App Name	Visible	Default
Propertybase Admin (pba_Propertybase_Admin_Lightning)		0
Propertybase Admin (Propertybase_Admin)		0
Propertybase Admin Lightning (Propertybase_Admin_Lightning)		\circ
Propertybase Agent (PB_Agent)		0
Propertybase Agent (pba_Propertybase_Agent_Lightning)		0
Propertybase Agent Lightning (PB_Agent_Lightning)	\checkmark	0
Propertybase Manager (pba_Propertybase)		0

• Click Save.

• Return to the main Profiles screen.
ADMINISTRATION

Users

Adoption Manager

Identity Provider Event Log

Permission Sets

Profiles

Public Groups

- 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.

Assigned Apps	Save	
App Name	Visible	Default
Community (standard_Community)		0
Content (standard_Content)		0
Data Assessment (standard_DataAssessment)		0
Marketing (standardMarketing)		0
Propertybase Admin (pba_Propertybase_Admin_Lightning)		0
Propertybase Admin (Propertybase_Admin)		0
Propertybase Admin Lightning (Propertybase_Admin_Lightning)	\checkmark	0
Propertybase Agent (PB_Agent)		0
Propertybase Agent (pba_Propertybase_Agent_Lightning)		0
Propertybase Agent Lightning (PB_Agent_Lightning)	Ø	0
Propertybase Manager (pba_Propertybase)		0
Sales (standard_LightningSales)		0
Sales (standardSales)		0
Sales Console (standard_LightningSalesConsole)		0
Salesforce Chatter (standard_Chatter)		0
Sample Console (standard_ServiceConsole)		0
Service (standard_Service)		0
Service Console (standard_LightningService)		0

· 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.

PLATFORM TOOLS	
∨ Apps	
App Manager 🛛 🔓	
AppExchange Marketplace	

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

Propertybase Admin	Propertybase_Admin	18.08.2017 18:54	Classic	T ²
Add "Classic	c" to the Label and add "_ Classic" to the Name	Э.		
	pertybase Admin Classic			
App Name Pro	pertybase_Admin_Cli i			
 Click Save. Go back to A Find Property 	App Manager. base Admin (App Type - Lightning), and click th	he arrow on the far right	, select Edit.	
Propertybase Admin Lightnin	g Propertybase_Admin_Light	18.08.2017 18:54	Lightning	~
 Remove "Lig 	ghtning" from the Label and remove "_Lightnin	ng" from the Name.		
App Details	5			
App Name	0			
Propertyba	se Admin			
* Developer N	ame A			
Propertybas				
	App Manager. base Agent (App Type Classic) and click the a	r row on the far right, se l	ect Edit.	
Propertybase Agent	PB_Agent	18.08.2017 18:54	Classic	7
Add "Classic	c" to the Label and add " _Classic" to the Name) .		
App Label Prop	pertybase Agent Classic]		
App Name PB_	Agent_Classic i			
Click Save.				

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

Propertybase Agent Lightning PB_Agent_Lightning	18.08.2017 18:54	Lightning	~	2
Remove "Lightning" from the Label and remo	ve "_Lightning" from the Name.			
App Details				
*App Name 🚯				
Propertybase Agent				
Developer Name				
PB_Agent				
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).

3	2	Propertybase Admin	Propertybase_Admin	21.08.2017 19:05	Lightning
	• (Click the far-right arrow and s	elect Edit.		
1	Edit	2			
1	Dele	ete			

• 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 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.

î	Home
Ħ	Calendar
ĭΞ	Tasks
63	Contacts
F	Companies
	Inquiries
	Listings
	Properties
ě	Offers
-101	Closings
1	Reports
0	Dashboards
۶	Settings

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

15	Propertybase Agent	PB_Agent	21.08.2017 19:10	Lightning
----	--------------------	----------	------------------	-----------

• 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.

î	Home
Ħ	Calendar
ĭ≡	Tasks
8	Contacts
	Listings
	Inquiries
ē	Offers
-	Closings
1	Reports
0	Dashboards

• 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.



13

ption

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

	ils		
	Object Rule Name Unique Name Description	Contact Custom Contact Matching Rule Custom_Contact_Matching_Ru	
Matching	Criteria		
Tell the	rule which fields to compare and	how.	
	F -14		
1	Field	Matching Method i	Match Blank Fields
1.	Email ᅌ	Exact	
2.	Email 🗘 Phone 🗘	Exact C	
2. 3.	Email Phone Mobile	Exact C Fuzzy: Phone C Fuzzy: Phone C	
2. 3. 4.	Email 🗘 Phone 🗘	Exact C Fuzzy: Phone C Fuzzy: Phone C	
2. 3. 4. 5.	Email Phone Mobile None None Comparison of the second	Exact Current Content of Content	
2. 3. 4. 5.	Email Phone MobileNone	Exact Current Content of Content	
2. 3. 4. 5. <u>Add Re</u>	Email Phone Mobile None Kerner- Kerner Kerner- Kerner- Kerner- Kerner	Exact Current Content of Content	
2. 3. 4. 5. <u>Add Ro</u> Filter L	Email Phone Mobile None Kerner- Kerner Kerner- Kerner- Kerner- Kerner	Exact Current Content of Content	

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

Edit	Delete	Clone	Activate
			65

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.

9	duplicate
∨ Da	ta
\sim	Duplicate Management
	Duplicate Error Logs
	Duplicate Rules
	Matching Rules

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

Standard Account Duplicate hule

Standard Contact Duplicate Rule

Standard Lead Dunlicate Bule

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

Matching Rules	
Define how duplicate records are identified.	
Compare Contacts With Matching Rule Matching Criteria	Select a Matching Rule Custom Contact Matching Rule Standard Contact Matching Rule = FALS
Field Mapping	Phone FUZZY: PHONE MatchBlank = FALSE) OR MobilePhone FUZZY: PHONE MatchBlank = FAL

• 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.

Details
Fields & Relationships
Buttons and Links
Object Limite
• 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.

Edit Activity Custom Field

Change Field Type Save Cancel **Custom Field Definition Edit** Field Information = Required Information Field Label Next Action Data Type Text Area Field Name Next_Action Description Filled by user when creating a follow-up action Help Text i General Options Required Always require a value in this field in order to save a record Default Value Show Formula Editor Use formula syntax: Enclose text and picklist value API names in double quotes : ("the text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7) Change Field Type Save Cancel

Help for this Page 📀

١

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

Step 4. Add to	o page layouts	
	Field Label	Next Action
	Data Type	Text Area
	Field Name	Next_Action
	Description	
		de this field. The field will be ac page, you will need to custom
Add Field	Page Layout Name	page, you will need to custom
	Event Layout	
	Showing	
	Task Layout	
When finished, o	lick Save & New to crea	te more custom fields, or click

• 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.

Edit Activity Custom Field Next Action Date		Help for this Page 🥹
Custom Field Definition Edit	Change Field Type Save Cancel	
Field Information	1	= Required Information
Field Label Field Name Description Help Text	Next Action Date Date Next_Action_Date Used by quick action "Close & Follow-Up"	
General Options		
Required Default Value	Always require a value in this field in order to save a record Show Formula Editor Use formula syntax: Enclose text and picklist value API names in double quotes : ("the text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7)	
	Change Field Type Save Cancel	

- 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.



• Click New in the top right corner of the screen.



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

Step 2. Choose the related object	:
Select the other object to which this of	bject is related.
Related To	Contact

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

New Relationship

Help for this Page 📀

Step 3. Enter the label and name	for the lookup field	Step 3 of 6
		Previous Next Cancel
Field Label	Client	
Field Name	Buyer_Tenant	
Description		
Help Text		
Child Relationship Name	Closings_Client	
Required	Always require a value in this field in order to save a record	
	Clear the value of this field. You can't choose this option if you make this field required.	
What to do if the lookup record is deleted?		
	O Don't allow deletion of the lookup record that's part of a lookup relationship.	
Lookup Filter		
Optionally, create a filter to limit the	records available to users in the lookup field. <u>Tell me more!</u>	
Show Filter Settings		
P Gridwin include Gettings		
		Previous Next Cancel

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

Step 4. Add to	page layouts	
	Field Label	Next Action
	Data Type	Text Area
	Field Name	Next_Action
	Description	
		de this field. The field will be ac page, you will need to custom
Add Field		page, you will need to castom
0	Page Layout Name	
	Event Layout	
	Showing	
	Task Layout	
When finished, c	lick Save & New to creat	te more custom fields, or click :

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.

Buttons, Links, and Actions

• 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

Help for this Page 🥹

Action Detail		Edit Delete Edit Layout			
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				Icon	<u>A</u>
Record Type					
Create Feed Item	1				
Success Message					
Created By	Bobby Buyer, 8/1/2017 2:31 PM			Modified By	Bobby Buyer, 8/1/2017 2:31 PM
		Edit Delete Edit Layout			
Predefined Field Values		Edit Delete Edit Layout			
Predefined Field Values Action Field Name	API Name		Field Type	Value	
	API Name pba Address pb c		Field Type Text Area		
				Value	
Action Field Name Edit Del Address	pba Address pb c		Text Area	Value Contact MailingStreet	
Action Field Name Edit Del Address Edit Del City	<u>pba Address pb c</u> pba City pb c		Text Area	Value Contact.MailingStreet Contact.MailingCity	

Predefined Field Values [4]

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

Contact Action Meeting

Help for this Page 🥹

Predefined Field Values [3] Action Detail Edit Delete Edit Layout Label ard Label Type Name Contact Create a Record Name Action Type onship Field eeting Meeting Description Target Object Event Icon 2 Record Type Create Feed Item Event 1 Created By Bobby Buyer, 8/1/2017 2:31 PM Modified By Bobby Buyer, 8/1/2017 2:31 PM Edit Delete Edit Layout Predefined Field Values New Action Field Name Edit | Del Event Subtype Edit | Del Assigned To Edit | Del Name Field Type Picklist Value Event API Name EventSubtype Lookup Lookup \$User.Id Contact.Id Ownerld Whold A Back To Top Always show me vmore records per related list

Layout Details

Subject Sample Subject		
Description Sample Description		
Start * 8/22/2017 1:18 PM		
End * 8/22/2017 1:18 PM		
All-Day Event		
Related To Sample Contract		
Location Sample Location		
Assigned To * Sample User		

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

Buttons, Links, and Actions

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

Q Quick Find	New Action	New Button or Link
--------------	------------	--------------------

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

Contact Custom Button or Link New Button or Link		Help for this Page 🧭
Custom Button or Link Edit	Save Quick Save Preview Cancel	
Label Name Description	Constanting the second s	Quick Tips - Getting Started - Same Buttons & Links - Operators & Functions
Display Type	Detail Page Link <u>View example</u> O Detail Page Button <u>View example</u> List Button <u>View example</u>	
Behavior Content Source	Display in new window	
Click Save.	Save Quick Save Preview Cancel	

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.



- 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.

Salesforce1 and Lightning Experience Actions 1

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Salesforce1 and Lightning Experience pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

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



listed in the image below.

• 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

Label: New					
Name: pba Action Type	/ Task Closingc.Ne e: Quick Action ed Item: Yes	ew_Task			
This item is	s currently in use	(click to locate)			

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.

Details	
Fields & Relationships	
Page Layouts	
Lightning Record Pages	
Buttons, Links, and Actions	
 On the next screen, click Account Layou Under Mobile and Lightning Experience A 	

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

Salesforce1 and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Salesforce1 and Lightning Experience pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

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

Save V Quick Sa	ave Preview
Fields Buttons	
Quick Actions	
Mobile & Lightnin Actions	g
Expanded Lookups	s
Related Lists	
Customize the n	uginigints pan

• 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.



Salesforce Mobile and Lightning Experience Actions 🧾	Salesforce	Mobile a	and Lightning	Experience Actions	i
--	------------	----------	---------------	--------------------	---

Click Save. Note: For the Company object you can safely ignore SystemInternalLayout Page Layout.	Calls Tasks	Events	Showings	Call	Edit	Delete	Sharing	New Contact	Start Action Plan
	Click Save.								
	Noto: For the C			ianoro Cuo	to minto m				

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.

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and	Actions
---------------------	---------

hi

- 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.

Save •	Quick Save	Preview
Fields		
Fields		
Buttons		
Quick Ac	tions	
Mobile & Actions	Lightning	
Expande	d Lookups	
Related L	ists	
		_
CUSIO	nize trie highi	igintis painte

• 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.

New Task		
	Label: New Task	
	Name: pbaClosingc.New_Task	
	Action Type: Quick Action	
	Create Feed Item: Yes	
	This item is currently in use (click to locate)	

Salesforce Mobile and Lightning Experience Actions

Calls	Send Email		Send Text	Tasks	Edit	Events	Showings	New Inquiry	Start Drip Campaign	Start Action Plan	New Offer
Add Owned P	roperty	Find	Duplicates	Sharing	Change F	Record Type	Delete				

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

Details	
Fields & Relationships	
Page Layouts	
ہر Lightning Record Pages	
Buttons, Links, and Actions	

- 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.

Salesforce Mobile and Lightning Experience Actions

Calls	Send Email		Send Text	Та	asks	Edit	Events	Showings	Start Drip Campaign	Start Action Plan	New Inquiry	New Offer
Add Owned I	Property	Change Record Type Find Duplicates		plicates	Delete							

• 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.



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

Save V Quick Save Preview
Fields Buttons Quick Actions
Mobile & Lightning Actions
Expanded Lookups Related Lists

Customize the highlights pane

• 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 on New Task	ver the action and look for the Name prefix "pba" as shown below.
Label: New Task Name: pbaClosingc.New_Task Action Type: Quick Action Create Feed Item: Yes	
This item is currently in use (click to locate)	
Balesforce Mobile and Lightning Experience Actions 👔	

Matching

Dele

Calls Send Email Tasks Events Showings Edit New Closing Start Action Plan Create PDF Email All Linked Contacts

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

Details					
Fields & Relationships					
Page Layouts					
んえ Lightning Record Pages					
Buttons, Links, and Actions					
 On the next screen, click Sale. Drag actions from the grey box at the top listed in the image below. 	of the screen, down	to the Mobile 8	Lightning Activ	ons area so	o that the actions mate
Salesforce Mobile and Lightning Experience Actions ${}^{\textcircled{1}}$					
Calls Send Email Tasks Events Showings Matching Delete	Edit New Offer	New Closing	Start Action Plan	Create PDF	Email All Linked Contacts

• Click Save.

11e: Configure Page Layout for Offers

• Click Object Manager at the top of the screen.



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

Sa	ve 🔻	Quick Sav	e Preview
Fie	lds		
But	ttons		
Qu	ick Ac	tions	
	bile & ions	Lightning	
Exp	ande	d Lookups	
Re	lated L	ists	

• 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.

New Task	
	Label: New Task
	Name: pbaClosingc.New_Task
	Action Type: Quick Action
	Create Feed Item: Yes
	This item is currently in use (click to locate)

Salesforce Mobile and Lightning Experience Actions i



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

Details
Fields & Relationships
Page Layouts
Lightning Record Pages

Buttons, Links, and Actions

- 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.

Salesforce Mobile and Lightning Experience Actions

		Calls	Tasks	Send Email	Events	Accept Offer	Cancel Offer	New Note	Edit	Start Action Plan	Delete
--	--	-------	-------	------------	--------	--------------	--------------	----------	------	-------------------	--------

• Click Save.

• (Click	Page	Layouts	in	the	left	hand	menu
-----	-------	------	---------	----	-----	------	------	------

Detelle	
Details	
Fields & Relationships	
Page Layouts	
Lightning Record Pages	
Buttons, Links, and Actions	
 On the next screen, click Rental Offer. Drag actions from the grey box at the top listed in the image below. 	of the screen, down to the Mobile & Lightning Actions area so that the actions match those
Salesforce Mobile and Lightning Experience Actions 1	
Calls Tasks Events Send Email Accept Offer	New Closing Cancel Offer Edit Start Action Plan Delete

• Click Save.

11f: Configure Page Layout for Requests (Inquiries)

• Click Object Manager at the top of the screen.



• 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.

New Task	
	Label: New Task Name: pbaClosingc.New_Task Action Type: Quick Action Create Feed Item: Yes
_	This item is currently in use (click to locate)

Calls	Tasks	Send Email	Events	Showings	Sharing	Edit	New Linked Listing	Start Action Plan	Matching	Delete

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.

☆• ₽ ?	🏟 🌲 🌘
Setup	
Developer Conso	le
att Edit Page 🔓	ack later.

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

	Pages ∨	
	LAST MODIFIED PAGES	ť
	Portal Record Page	
ſ	Template Record Page	- 1
ł	Property Record Page	
	Listing Record Page	
	Offer Record Page	
	Contact Record Page	
	Inquiry Record Page	
	Closing Record Page	
	Company Record Page	
	Home Page Default	-
	+ New Page	4
l	Open Page	_

• When prompted to leave the page, click Confirm.

	Leave page
Are you sure you w	ant to navigate away from this page? You'll lose any unsaved changes.

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

C X 8 8	🖵 Desktop	Shrink To View 💌 🦉 Refre	sh		Save Activation
htning Components	Contact				Page
Search components Q	Contact Bobby Buyer	Do Not Call Emul	Maling Address Contact Owner	+ folion New Buyer Request New Offer Edit •	*Label
	Propenybase	boyer@propertybase.com	Chris Stauffer &		Contact Record Page
Standard (23)		and a second		and the second sec	
Activities	DETAILS RELATED	MATCHING EMAIL		ACTIVITY TRACKING CHATTER	* Developer Name
Chatter					Contact_Record_Page
Chatter Feed	Name Bobby Buyer	/ Contact Owner		Email Tracking	
Chatter Publisher	Company Name	0		Sandbox authentication is not supported	Page Type
Flow	Propertybase			Ney 🔷	Record Page
Highlights Panel	Title	/ bbuyer@propert	share rom		
List View	Phone	Email Opt Out		0	Object
News					Contact
Potential Duplicates	Mobile	Do Not Call			
Quip					Template
Recent Items	V Qualification				Header and Right Sidebar
Recommendations	Stage	Contact Type		1	The sole is the regine store out
Record Detail	Lead Ranking	Lead Source			Description
Related List - Single		 Personal Contact 	ts and Refemals (SOE)		
Related List Quick Links					
Related Lists	Maling Address	Other Address		N	· · · · · · · · · · · · · · · · · · ·
Related Record					
Report Chart	 Additional Information 				
Rich Text	Fax	Brthdate			
Tabs	Other Phone	Referral Contact			
Trending Topics					
Twitter	Home Phone				
Visualforce	Assistant	- Space			

• 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.

Page > Visualforce	
Label	0
Stage Path	
Visualforce Page Name	0
Contact Path	•
Height (in pixels)	
33	

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.

🖬 Lightning App Builder	🖺 Pages 🗸			c	ontact Record Page	1		← Back ?	? Help
5 C X 8 8	Ģ	Desktop	Shrink To View	Cf Refresh			Ser	ne Activatio	on
Lightning Components	C.	Contact Bobby Buyer				+ Follow Edit Start Drip Campaign Start Action Plan	Page		
Search components	۹.	Company Phone(2) +	Do Not Call Errol		Contact Owner	- more for series carpeter series -	*Label		
 Standard (24) 		Propertybase	. Bbuy	er@propertybane.com	🖰 Bobby Bayer 2		Contact Record Page		
Accordion		Stage Path					Developer Name		
Accordion Activities		Lead	Showing	Offer	Client	Archived V Mark Status as Complete	Contact_Record_Page		
							Contact_Record_Page		
Chatter	- F	DETAILS RELATED	EMAIL			ACTIVITY TRACKING CHATTER	Page Type		
Chatter Publisher							Record Page		
Flow		Name		Contact Owner		Log a Call New Task New Event New Sho	Mecord Hage		
Highlights Panel		Bobby Buyer		🖰 Bobby Buyer		Log a Call Preve sale. Preve sale.	Object		
List View		Company Name Propertybase				Create new.			
News		Tev		Email bbuyer@propertybase.com			Contact		
Potential Duplicates		Phone		Email Opt Out		Activity Timeline T C' Expand Al	Template		
Quip		Mubile		Do Not Call		Next Steps			
Recent Items						No next steps. To get things moving, add a task or set up a meeting.	Header and Right Side	bar	
Recommendations		V Qualification				Past Activity			
		Stage Lead		Contact Type		No past activity Past meetings and tasks marked as done show up here.	Description		
Record Detail		Lead Ranking		Lead Source Personal Contacts and Refemals (SOI)		Load More Part Activities			
Related List - Single		✓ Address Information				L			
Related List Quick Links		Mailing Address		Other Address					
Related Lists									
Related Record		v Additional Information		•					
Report Chart		fas		Birthdate					
Rich Text		Other Phone		Referral Contact					
Tabs		Home Phone							
Trending Topics									
Twitter		Assistant		Spoure					
Get more on the AppExch		Aut. Phone		Spouse's Email					

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.

Set as Org De	efault: Contact Record	Page
o display it for all Contact record	ds, except when app default or ap	p, record type, or profile-specific assignments are
LAST MODIFIED	NEW ORG DEFAULT	LAST MODIFIED
	Contact Record Page	Bobby Buyer 17.08.2017
		Back Save
	D display it for all Contact record	

• 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.



Approval Requests

Chatter

Control Center Email Deliveries

Linked Listings

People



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

tatus active	Listing Type Sale	Property Type Multi Family	Street 1716 Rose St	City Berkeley	Listing Price USD 800,500.00		
		>			0		

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.

	Leave page	
Are you sure you want	o navigate away from th unsaved changes.	is page? You'll lose ar
		Cancel

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.

a subscription of the second							
Listing Type Sale	Property Type Multi Family	Street 1716 Rose St	City Berkeley	Listing Price USD 800,500.00			

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

Configure the Path

Set Up Path

- 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.

Step 1: Name Your Path and Choose an Object

The object and record type you choose determine the business process for your users.

Path Name	Listing_Sale_Path	
API Reference Name	Listing_Sale_Path	
Object	Listing	\$
Record Type	Sale	\$
Picklist	Status	ŧ

- 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.

	Format
	linear
+ ×	Hide path upda
тү	

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

Lightning App Builder - Listing Record	Page		← Back ? Help
5 C X B B	🖵 Desktop Shrink To View 🔻 🥑 Refe	resh	Save Activation
Lightning Components C ⁴	Long Generic Listing	+ Fallow Edit Circuite Action Plan Update Property from Listing	Page
Search components Q	Generic Listing Suitus Listing Type Property Type Street City In Preparation Sale Deriver	+ False Edit Courte Action Pate Update Property False Lading	*Label Listing Record Page
	ELANE OF MALES MARCES AND MELAN From Menage Broken and exclusion of exclusion The melance of the melanomic of the melanomi	ENDL CONTROL Control Control Provinciality of Control Pro- Provinciality of Control Pro- Networks of Control Pro- Network of Control Pro- Networks	Developer Name Uting_Necod_Rep11 Page Type Record Rage Object Using Tumplate Header and Right Sciebar Description
Related List Quick Links Related Lists Related Lists Related Lists Report Chart Report Chart Refore Chart Refore Chart Tending Topics Transfire VisualForce Castom (0)	L	•	
Get more on the AppExchange			

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**.

			Lea	ve pag	e			
Are you su	re you wa	ant to	-	e away ed chan		s page?	You'll los	se any
							Cancel	Confirm

Click Save.

• At the top of the page, click Activation...



• When prompted, click Assign as Org Default.

		Activation: Contact Record Page
Custom record pa	ages can be assigned	at different levels:
😚 The org default	record page displays for a	an object unless more specific assignments are made.
🕞 🛃 App defa	ult page assignment, if sp	pecified, overrides the org default.
	o, record type, profile ass	ignments override org and app defaults.
Learn more about Lig	htning page assignment.	
ORG DEFAULT	APP DEFAULT	APP, RECORD TYPE, AND PROFILE
t this page as the org	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
et this page as the org offined. Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
fined. Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
fined. Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
fined. Assign as Org Default	defauit to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
fined. Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
fined. Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are

• On the next screen, click Save.

Set as Org Default: Contact Record Page				
Set this page as the org default to display it for all Contact records, except when app default or app, record type, or profile-specific assignments are defined.				
Re	Review Assignments (1)			
CL	URRENT ORG DEFAULT	LAST MODIFIED	NEW ORG DEFAULT	LAST MODIFIED
Sy	ystem Default		Contact Record Page	Bobby Buyer 17.08.2017
Cancel Back 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.
	र 🖬 ? 🏟	ê
	🕸 Setup	
	Developer Console	
att	Edit Page	ack later.

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

	Pages ∨	
	LAST MODIFIED PAGES	ť
1	Property Record Page	
_	Listing Record Page	- [
1	Contact Record Page	
	Portal Record Page	
	Template Record Page	ly
	Offer Record Page	- 1
	Inquiry Record Page	
	Closing Record Page	c h
	Company Record Page	
	Home Page Default	5
	+ New Page	2
	Open 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.

		Activation: Contact Record Page
Custom record pa	ages can be assigned	at different levels:
🚯 The org default	record page displays for a	an object unless more specific assignments are made.
🕒 🗲 App defa	ult page assignment, if sp	pecified, overrides the org default.
	p, record type, profile ass	signments override org and app defaults.
Learn more about Lig	htning page assignment.	
ORG DEFAULT	APP DEFAULT	APP, RECORD TYPE, AND PROFILE
et this page as the org e efined. Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
Assign as Org Default	defauit to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are

• On the next screen, click Save.

	Set as Org De	efault: Contact Record	Page	
 Set this page as the org default to defined.	o display it for all Contact record	s, except when app default or ap	p, record type, or profile-specific assignments	are
Review Assignments (1)				
CURRENT ORG DEFAULT	LAST MODIFIED	NEW ORG DEFAULT	LAST MODIFIED	
System Default		Contact Record Page	Bobby Buyer 17.08.2017	
Cancel			Back	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.

	Leave page
Are you su	ire you want to navigate away from this page? You'll lose any unsaved changes.

- 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.

-	Custom	
AC	Standard & Activity	
C	Build	

• A new textbox will appear, type Matching. Click Done.

Matching	
	Done

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

D F T A LL F	0.51 4750	
DETAILS	RELATED	MATCHIN

- 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.

Page > Visualforce	
Label	0
Leave blank for default	
Visualforce Page Name	0
Inquiry Matching	*
Height (in pixels)	
700	

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



• When prompted, click Assign as Org Default.

		Activation: Contact Record Page
Custom record pa	ages can be assigned	at different levels:
😚 The org default	record page displays for a	an object unless more specific assignments are made.
🕒 🗲 App defa	ult page assignment, if sp	pecified, overrides the org default.
	p, record type, profile ass	ignments override org and app defaults.
Learn more about Lig	shtning page assignment.	
ORG DEFAULT	APP DEFAULT	APP, RECORD TYPE, AND PROFILE
	al a face de la coltante de la face en la	
t this page as the org fined. Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
fined. Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
fined. Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
fined. Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
fined. Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are
fined. Assign as Org Default	default to display it for all	Contact records, except when app default or app, record type, or profile-specific assignments are

• On the next screen, click Save.

	Set as Org De	efault: Contact Record	Page
Set this page as the org default to defined.	display it for all Contact record	is, except when app default or ap	op, record type, or profile-specific assignments are
Review Assignments (1)			
CURRENT ORG DEFAULT	LAST MODIFIED	NEW ORG DEFAULT	LAST MODIFIED
System Default		Contact Record Page	Bobby Buyer 17.08.2017
Cancel			Back

• 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.

ADMINISTRATION

```
    Users
    Adoption Manager
    Identity Provider Event Log
    Permission Sets
    Profiles
    Public Groups
```

- 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.

```
Profile Overview > Apex Class Access
```

• In the drop down menu click Visualforce Page Access.

```
eta App Permissions
Apex Class Access
Visualforce Page Access
Ba External Data Source 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.

ADMINISTRATION
∨ Users
Adoption Manager
Identity Provider Event Log
Permission Sets
Profiles
Public Groups

• 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.

Q deploy
 Environments
✓ Deploy
Deployment Settings
Deployment Status

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

A deployment connection allows customizations to be copied fro and from this organization to others.

This Organization: Propertybase (Production)

rating from Propertyb:

• Select Allow Inbound Changes and then click Save.

Upload Authorization Direction	
Allow Inbound Changes 🛛 🔽	
	Save Cancel

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.

	🖅 🖪 ? 🏟 🌲 🎡
	Setup
	Developer Console
n riş	Edit Page

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

 Environments 	
✓ Change Sets	
Inbound Change Sets	
Outbound Change Sets	
- •	
	set, you will be shown a screen that explains how they work. After reviewing this pag creen to hide this message when performing future change sets.

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

Change Set Edit	Save
Name	Lightning Migration
Description	
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.

Change Set Components

Add View/Add Dependencies

• 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.

0

Show me fewer ▲ / ▼ more records per list page

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

Show me fewer A records per list page

Component Type: Action

	Name 1
<	Accept Offer Lightning
<	Add Owned Property
<	Call
<	Call
<	Cancel Offer Lightning
 Image: A start of the start of	Company New Task
 Image: A start of the start of	Contact Add Property Owned
 Image: A start of the start of	Defer
 Image: A start of the start of	Defer 0
 Image: A start of the start of	Defer 1
 Image: A start of the start of	EditDescription
 Image: A start of the start of	EditDescription 0
 Image: A start of the start of	EditDescription 1
<	Event
<	Event
✓	Event
✓	LogACall
<	Log a Call
✓	Log a Call
<	Log Call
<	Meeting
✓	Meeting
<	Meeting
<	NewChildCase
<	NewGroup

• 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.

Q inbound]
 Environments 	
✓ Change Sets	
Inbound Change Sets	2

• 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.