Considerations Before Transitioning to Lightning Experience

Salesforce, Winter '16

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CONSIDERATIONS BEFORE TRANSITIONING TO LIGHTNING EXPERIENCE

Lightning Experience Considerations

This release of Lightning Experience doesn't include everything that's available in Salesforce Classic. Review these topics to see if any functionality that's critical to your business is limited or unavailable in this release. This information can also help you train users about what to expect when you do switch to Lightning Experience.

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Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

Switching between Lightning Experience and Salesforce Classic is fast and easy. But switching between interfaces affects the underlying URL routing logic and can lead to some unexpected results when links are resolved. Be aware of the impact on bookmarks and links in emails or Chatter posts, especially if your organization has a subset of users authorized for Lightning Experience while others are still using Salesforce Classic.

What's Not Available in Lightning Experience

Learn about Salesforce features that aren't available in the new interface or that have gaps from what you're used to in Salesforce Classic. Keep in mind that features not supported yet in the new interface are still available to your users. They can easily switch to Salesforce Classic and keep working.

What to Expect in Lightning Experience When Chatter Is Turned Off

If your organization doesn't use Chatter, several useful aspects of the Lightning Experience interface aren't available. Learn how Lightning Experience changes, and see if you're losing functionality that you'd rather not live without.

Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

Switching between Lightning Experience and Salesforce Classic is fast and easy. But switching between interfaces affects the underlying URL routing logic and can lead to some unexpected results when links are resolved. Be aware of the impact on bookmarks and links in emails or Chatter posts, especially if your organization has a subset of users authorized for Lightning Experience while others are still using Salesforce Classic.

When users are first enabled for Lightning Experience, the new interface is their default, *preferred* experience. Every time a user switches interfaces via the Switcher, the user's default preference resets to the current environment. With this behavior in mind, here are the typical link routing interactions your users can encounter.

User Has the "Lightning Experience" Permission?	User's Default Experience	Where Links Open
Yes	Lightning Experience	For pages supported in Lightning Experience, links open in the new interface (even for links generated in Salesforce Classic).
		Links to unsupported pages are directed to Salesforce Classic, which opens in a new tab. This temporary redirection doesn't change the user's default preference to Salesforce Classic. The next time the user selects a link that is supported in the new interface, the Salesforce Classic tab is reloaded to open the link in Lightning Experience.
Yes	Salesforce Classic	Links generally open in Salesforce Classic.
		If a link was generated in Lightning Experience (meaning it includes `/one/one.app` in the URL), the link opens in Lightning Experience. The user's default preference isn't changed to Lightning Experience.
No	Salesforce Classic	Links open in Salesforce Classic only.
		If a link was generated in Lightning Experience (meaning it includes `/one/one.app` in the URL), the link doesn't open, because the user can't access Lightning Experience.

Given these routing behaviors, you can see the potential for confusion if users share Lightning Experience links, typically via Chatter posts or email, with Salesforce Classic users. To avoid this problem, we recommend enabling the new interface for all users who work closely together.

We also recommend training your Lightning Experience users to understand how links and bookmarks work across the two experiences.

What's Not Available in Lightning Experience

Learn about Salesforce features that aren't available in the new interface or that have gaps from what you're used to in Salesforce Classic. Keep in mind that features not supported yet in the new interface are still available to your users. They can easily switch to Salesforce Classic and keep working.

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EDITIONS

Available in:
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Developer

Data Access and Views: Lightning Experience Limitations

Learn about the issues to expect when accessing data in Lightning Experience. Some Salesforce data and features aren't available in the new user interface. And some features don't have full parity with what's available in Salesforce Classic.

Objects

These Salesforce objects are available in Lightning Experience. None of the other standard objects are supported in this release.

- Accounts
- Cases
- Contacts
- Dashboards
- Events
- Files
- Leads
- Notes
- Opportunities
- Price books
- Products
- Reports
- Tasks
- Custom objects

Fields

- Fields for unsupported objects display in Lightning Experience, but they are read-only and don't include links to associated records.
- Formula fields with hyperlinks aren't supported.
- Formula fields with images aren't supported in list views, related lists, or search results. The field name displays but the field itself is empty.
- Field-level help isn't widely available in this release. You can't define custom help text or add field-level help for fields in custom objects.

Related Lists

- Related lists for supported standard objects and your custom objects are available in Lightning Experience.

  Related lists for objects that aren't supported in Lightning Experience don't appear anywhere in the interface, even if they're included on an object's page layout.

- In Lightning Experience, related lists appear in related list cards on record home pages. The first eight related lists show related list buttons, the first several records from the list, and a link to open the full list of records. For any additional related lists, only the list name appears in the card. Users can still work with these related lists—simply click the related list name to access the full list. Here, users can see records in the list and use related list buttons (such as **New**) or row-level record actions.

- Lightning Experience includes new Files and Notes related lists, as well as the classic Notes & Attachments related list. If you're using Salesforce Files or the enhanced Notes feature, you'll want to include all of these related lists on your object page layouts.

  - Files and attachments are two different types of objects, and always have been. Files uploaded via the Notes & Attachments related list are simply files in Lightning Experience, but are attachments in Salesforce Classic. For existing organizations, this means that the Notes & Attachments list can contain a mix of attachments that were uploaded in Salesforce Classic and files added in Lightning Experience. Files added in Lightning Experience have the functionality of Salesforce Files, while attachments are associated only with the particular record and can't be shared further.

    In the API, any existing integrations that retrieve attachments from the Notes & Attachments list don't include any files uploaded to the list in Lightning Experience. A new API call is necessary to retrieve files as well as attachments.

  - Notes created with the old note-taking tool in Salesforce Classic are available from the Notes & Attachments related list only. Any notes created with the enhanced version of Notes appear in the Notes related list only.

- For Group Edition users, the Contacts related list doesn't display on accounts.

- Product details include a single Price Books related list, unlike Salesforce Classic, which includes related lists for Standard Prices and Price Books.

- On the detail page for objects that support activities, Salesforce doesn't display Open Activities or Activity History along with other related lists. It displays the activity timeline instead. Objects that support activities include opportunities, leads, accounts, contacts, and any custom objects on which you enable activities.

  If you delete either activity related list from page layouts, Salesforce doesn't display the corresponding timeline sections—Next Steps or Past Activity—on those pages.

Object Home

These features aren't available on object home pages in Lightning Experience.

- Quick Create tool
- Access to object-specific reports
- Any of the tools in the Tools section
- Summary report tool

List Views

These list view features aren't available in Lightning Experience.

- Inline editing of fields
- Following records directly from a list
- Sharing list views with groups
- Clone list views

- Mass actions, custom actions, or custom buttons
- Advanced filter logic
- Drag-and-drop scheduling for account, contact, and lead list views
- Feeds
- The 🖨 icon to create a printable view of a list

Creation and editing of list views in Lightning Experience is currently in pilot and available only in Trial orgs. Contact Salesforce to get a Trial org, where you can try out writeable list views with integrated filtering capability. We provide this feature to selected customers through a pilot program that requires agreement to specific terms and conditions. To be nominated to participate in the program, contact Salesforce. Because pilot programs are subject to change, we can't guarantee acceptance. This pilot feature isn't generally available, as referenced in this document or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available features.

List views display and behave differently in Lightning Experience.

- Navigation through list views has changed. Because list views have infinite scrolling, you can't specify the number of records to show per page. Also, you can't navigate through pages with arrow buttons, and you can't jump to a specific page of results. Jumping to records with names that start with a particular letter isn't available.
- The drop-down menu shows up to 200 views. Recently viewed lists are displayed first, followed by other list views in alphabetical order. Although only 200 views are displayed in the menu, you can search up to 2,000. If you have more than 2,000 list views, some views aren't returned in the search results. You can switch back to Salesforce Classic to find all your list views.
- You can't change the width of a column by dragging the right side of the column heading. To adjust the column widths, switch to Salesforce Classic. The new widths are then reflected in Lightning Experience.
- You can't change the order of columns by dragging the column heading to a new position in the table. Instead, you change the columns that appear and their order by choosing **Select Fields to Display** from the List View Controls drop-down menu. If you add or remove a column in Lightning Experience, all custom column widths are deleted. You can switch back to Salesforce Classic to adjust column widths.
- Limited row-level actions are available. For most objects, available actions are Edit and Delete. For leads, two more actions are available: Convert and Clone. For files, available actions are Edit, Delete, and Download.
- The name of the recent records list that displays on the home page for every standard and custom object is different in Lightning Experience. It's called Recently Viewed. This view isn't deletable, filterable, or editable. Salesforce admins can use the Object Manager in Setup to select and order columns for this view. Your users can sort items in the view by clicking inside a column header. An arrow in the column header shows if the list items are sorted in ascending or descending order.
- Another list view is available for most standard objects via the drop-down list with a name similar to Recently Viewed. The name of this view includes the name of the object. For example, this list view for accounts is called Recently Viewed Accounts. These two list views, Recently Viewed and Recently Viewed *Objects*, show the same records. The Recently Viewed *Objects* list view isn't deletable, filterable, or editable. Your users can sort the records and chart this list view's data. They can switch to Salesforce Classic to reorder the columns displayed in the list view. The columns appear in the new order when the user switches back to Lightning Experience.
- Formula fields with images aren't supported in list views in Lightning Experience. The field name displays but the field itself is empty.

Working with Data

These features aren't available in Lightning Experience.

- Inline editing on lists or records
- Editing multi-line layouts
- Printing a page
- Generating a PDF file

The Salesforce sidebar that appears on the left side of most pages in Salesforce Classic isn't replicated in Lightning Experience. Items from the sidebar aren't included either, including:

- The Tags link and Recent Tags drop-down list
- The Create New drop-down list; use the **New** button on object home pages
- The Calendar shortcut; access the Calendar from the navigation menu
- The Recent Items list; see recent items on the Home page or on object home pages
- Messages and Alerts
- Custom Links

The Recycle Bin isn't available. Records deleted in Lightning Experience still go to the Recycle Bin, but users have to switch to Salesforce Classic to view or restore recently deleted records.

Accessibility

- Accessibility mode isn't provided because it's not needed in Lightning Experience. The interface is designed according to the latest accessibility standards, so screen readers are supported natively.
- The color-blind palette isn't needed either. If it's enabled for your organization, it affects only the report builder.

Sales Features: Lightning Experience Limitations

Learn about the issues to that your Sales team can encounter in Lightning Experience. Some Salesforce data and features aren't available in the new user interface. And some features don't have full parity with what's available in Salesforce Classic.

Sales Features

Opportunities, Leads, Accounts, and Contacts

- Twitter is the only social network available in Lightning Experience.
- Twitter is styled as its own card, visible directly on the record home page.

Sales Path for Opportunities and Leads

- You can include a maximum of five fields and 1,000 characters of rich text in each sales stage.
- You cannot require fields in any particular stage. You can, however, set up a validation rule based on the stage and then include the fields in the sales path.
- Dependent fields are ignored when moving an opportunity stage using the Sales Path.
- If you set fields to the Read-Only or Required permissions in page layouts, Sales Path doesn't enforce those permissions.
- Fields included in sales paths, but not in page layouts, appear as read-only fields.
- Although not a limitation, keep in mind that deleting a record type that has a corresponding sales path also deletes the sales path.
- Validation rules appear as page-level messages, even if you configure the rules to appear near the fields.
- For lead sales paths, we recommend you place Unqualified statuses at the beginning of the sales paths.

Features Not Available in Lightning Experience

- Assets
- Campaigns and Campaign Members
- Contracts
- Forecasts (including Collaborative Forecasts and Customizable Forecasts)

- Orders

- Quotes

- Person Accounts

- Divisions

- Mass Division Transfer

Accounts

Organizations Using Person Accounts Can't Enable Lightning Experience

Person accounts aren't supported in Lightning Experience.

If your Salesforce implementation uses person accounts, you can't enable Lightning Experience for your production organization, regardless of your edition. But to give you an opportunity to try out the new interface, you can enable Lightning Experience in your sandbox environments. This option will be available beginning October 24, 2015. And rest assured, adding person account support in the future is a top priority.

When testing Lightning Experience in a sandbox, be aware of these known issues. These issues will be resolved when person accounts are supported in a future release.

- Editing person accounts on the contact detail view in Lightning Experience can introduce errors. This is because person accounts don't appear as accounts, like they do in Salesforce Classic. Instead, person accounts appear as both accounts and contacts.

- Person accounts aren't accessible from Setup.

- For contacts, the Account Name field lookup results include both business and person accounts. The results incorrectly include person accounts.

- The contact page layout appears for person accounts from the contact list view, search results, and lookups.

- On person account details, the page title incorrectly appears as *Account* instead of *Person Account*.

Contacts Related List on Accounts

- When a contact is created from the Contacts related list on an account, the contact's mailing address isn't populated with the account's billing address.

- For Group Edition users, the Contacts related list doesn't display on accounts.

Features Not Available in Lightning Experience

- Account Hierarchy

- Account History

- Account Merge

- Account Partners

- Account Teams

- Account Territories

- Contact Roles on Accounts

Contacts

Opportunities Related List on Contacts

- When you click **New** on the Opportunity related list on a contact, Salesforce adds the contact to the contact field for a new or existing opportunity.

Features Not Available in Lightning Experience

- Contact Hierarchy
- Contact Merge
- Contact Roles on Accounts
- Contact Roles on Cases
- Stay-in-Touch fields

Leads

Features Not Available in Lightning Experience

- Lead campaign history
- Assign leads to campaigns
- Assignment rules when manually creating leads
- Change lead owners to queues
- Identify and merge duplicate records from the lead workspace (but you can set up Duplicate Management to prevent the creation of duplicate leads)
- Automatic field population for accounts created during lead conversion

Opportunities

Sales reps can add only:

- One product to an opportunity or a price book at a time
- One contact role to an opportunity at a time

When you add a product to an opportunity in Lightning Experience or Salesforce1, and the product has default schedules, Salesforce doesn't create the schedules.

Opportunity Board

- The Board is not available from the Recently Viewed list view. Users need to select another list view before they can switch to the Board.
- The Board shows the opportunities for only one sales path at a time. If your organization uses multiple sales paths, create a separate list view for each and filter it by record type. Make the new list views public so your users can access them.
- The Board doesn't let users specify a reason when they change an opportunity's stage to Closed Lost. If your organization requires users to include a reason, they can still move opportunities to Closed Lost from the Board; however, when they switch back to Salesforce Classic, they'll be prompted for a reason.
- Users receive alerts on opportunities with overdue tasks, no open activities, or no activity in the last 30 days. The alert isn't customizable in Winter '16.
- Validation rules still apply when changing the stage of an opportunity using the Board view, but users need to navigate to the opportunity workspace to address any validation rules.
- Dependent fields are ignored when using the Board view. Users need to navigate to the opportunity workspace to address any dependent fields.

Features Not Available in Lightning Experience

- Big deal alerts
- Opportunity Splits

- Opportunity Teams
- Similar Opportunities
- Multi-line layout editing

You can't edit the `Probability` or `Forecast Category` fields. However, field values are automatically populated, based on the value of the `Stage Opportunities` field, when you save the record. You can manually edit the values for these fields in Salesforce Classic.

Products and Price Books

Products and Price Books

- Product details include a single Price Books related list, unlike Salesforce Classic, which includes related lists for Standard Prices and Price Books.
- For organizations already activated, the Add to Price Book page doesn't include the `Use Standard Price` option by default. To make `Use Standard Price` available, add it to your Price Book Entry page layouts.
- For organizations already activated, the Price Books home page doesn't include an `All Price Books` list view by default.

Features Not Available in Lightning Experience

- Archiving products and price books

  📝 Note: As an alternative, deactivating products and price books preserves all the records related to them.

- Product revenue and quantity schedules

Territory Management and Enterprise Territory Management

Territory Management

Original Territory Management appears in the Lightning Experience Setup tree. From there, you can enable, configure, and maintain the feature. Territory information, assignments, and reports are available and viewable in Salesforce Classic only.

Enterprise Territory Management

Enterprise Territory Management is available in Salesforce Classic only.

Productivity Features: Lightning Experience Limitations

Learn about the issues to expect when using Salesforce productivity tools in Lightning Experience. Some Salesforce features aren't available in the new user interface. And some features don't have full parity with what's available in Salesforce Classic.

Home

The Salesforce home page is reimagined in Lightning Experience. Home now focuses on top sales user priorities, including the sales reps' quarterly sales performance and notifications about tasks, leads, and opportunities.

Home Features Not Available in Lightning Experience

- Alert banners
- Chatter feed and publisher
- Recommendations
- Custom components, such as dashboard snapshots
- Calendar

Customization Not Supported

Lightning Experience doesn't support:

- Adding any standard or custom components
- Removing components already on the page
- Creating custom buttons or links
- Changing the page layout

It's a top priority to make the home page customizable, and we're working on this functionality for a future release.

Activities

Differences in Lightning Experience Compared to Salesforce Classic

Activity Timeline and Activities Related Lists

On the detail page for objects that support activities, Lightning Experience doesn't display Open Activities or Activity History along with other related lists. It displays the activity timeline instead. Objects that support activities include opportunities, leads, accounts, contacts, and any custom objects on which you enable activities.

If you delete either activity related list from page layouts, Salesforce doesn't display the corresponding timeline sections—Next Steps or Past Activity—on those pages.

To represent all activities from future to past, the activity timeline displays open activities in the opposite order from the Open Activities related list. Under Next Steps, the timeline displays open activities in chronological order from top to bottom. Undated tasks appear at the top and overdue tasks appear last.

Configuration of Tabs in Activity Composer

Settings in some Salesforce orgs prevent the activity composer on opportunities or other objects from displaying activity tabs. To adjust your settings, see Configure the Call, Task, and Event Tabs in the Activity Composer in Lightning Experience and Configure the Email Tab in the Activity Composer in Lightning Experience.

Customization of Display and Order of Fields in Activity Timeline

In the activity timeline, you can customize the display and order of fields for events, tasks, and logged calls using event and task compact layouts. However, even if you remove certain fields from a layout, they remain in the timeline because they contain critical activity information. For example, suppose that you remove the due date, the date and time, or the task status fields from the compact layouts. The event start date and time, the task checkbox, the task due date, and the call logging date still appear on activities in the timeline. The description field on events and the comments field on tasks also always appear in the timeline, although they aren't available in the compact layout. The remaining fields visible in the timeline reflect the fields you include in the compact layout.

Customization of Display and Order of Fields in Task List

In the task list, you can customize the display and order of fields for individual tasks using task compact layouts. However, even if you remove certain fields from a layout, they remain in the task list because they contain critical task information. For example, suppose that you remove the status and due date fields from a compact layout. The task checkbox and the due date still appear on tasks in the list. The remaining fields visible in the list reflect the fields you include in the compact layout.

No Customization Support for Activity Timeline Icons

You can't customize the icons for activity types (events, tasks, calls, and email) in the timeline.

Overdue Tasks

Lightning Experience doesn't display any overdue tasks when a user has more than 1,000 tasks that are overdue. A user can switch to Salesforce Classic to view overdue tasks and close them, postpone them, or delete their due dates.

Task Assignment Notifications

Lightning Experience displays no option to send an email when a user assigns a task. It also displays no personal setting to receive an email when someone assigns a task. However, suppose that a user switches from Lightning Experience to Salesforce Classic. In

that case, users can receive emails for tasks that they assign to themselves or tasks created with a status of Completed. These options depend on how you set up your Salesforce org.

Access to Records Related to Activities

Suppose that a user is looking at an event or a task related to a contact, Janita Smith. If the user doesn't have access to the contact Janita Smith in particular or to contacts in general, Salesforce displays the field as follows.

- In Salesforce Classic, the field is empty (as if there were no data).
- In Salesforce1, the field displays the record name. A user can delete the record or add others, subject to normal validation.
- In Lightning Experience, the field displays "No access" in place of the record name. A user can delete the record or add others, subject to normal validation.

Follow-Up Activities

Lightning Experience doesn't display the **Create Follow-Up Event** or **Create Follow-Up Task** buttons for creating an event or a task on a record. Instead, the composer on a record for an opportunity, a lead, an account, or a contact prefills the `Name` and `Related To` fields on events and tasks.

Calendar Views

The calendar displays only a day view or a week view. It has no month view or activity list view. You can't hide weekends.

Calendar Shortcut

Lightning Experience doesn't offer the option to add a calendar shortcut to the sidebar. Instead, the navigation menu includes a **Calendar** link by default.

Features Not Available in Lightning Experience

- Event invitations aren't supported. Users can't invite others to events, update invitations to events, accept or decline invitations, or view a related list of invitees to an event.
- Users can't create recurring events or tasks, and they can't edit a recurring event or task that was created in Salesforce Classic. However, they can view and edit individual occurrences of a recurring event created in Salesforce Classic.
- Users can't create a Microsoft® Outlook® appointment from a Salesforce event.
- Users can't assign copies of a task (group tasks) to coworkers.
- Users can't spell-check the `Description` field on events or the `Comments` field on tasks.
- Users can't set or view activity reminders (reminders of upcoming events or tasks due).
- You can't create public calendars or resource calendars. Users can't view public calendars or resource calendars created in Salesforce Classic.
- Lightning Experience has no **My Team's Activities** list view, and users can't edit tasks owned by people below them in the role hierarchy. Users can view events and tasks owned by people below them in the role hierarchy in reports. They can also view tasks that they've reassigned to people below them in the role hierarchy by choosing the Delegated view in the task list.
- Users can't share their calendars, and Lightning Experience can't display multiple people's calendars.
- Lightning Experience doesn't display a task list alongside the calendar.
- Lightning Experience doesn't display a mini calendar on the event detail page for an account or an opportunity.
- Users can't add an event in the calendar by double-clicking a time slot or clicking ◆.
- Users can't create events in a list view by dragging a lead or other record from the list to the calendar below the list.
- Lightning Experience doesn't support Cloud Scheduler meeting requests.
- Lightning Experience has no print view for the calendar.

Notes

Notes created with the old note-taking tool in Salesforce Classic are available from the Notes & Attachments related list only. Any notes created with the enhanced version of Notes appear in the Notes related list only.

Integrated Email

Supported Objects

Integrated Email is supported for accounts, contacts, leads, and opportunities only, and not for cases, campaigns, custom objects, or person accounts. Email can be sent to contacts, leads, and users. Fields available for templates are based on the object from which the template is created, plus User fields. For example, if you have an opportunity record open and create a template, you can only add Opportunity fields and User fields to your template. Similarly, email templates created for one object are not available for use from other objects. For example, templates created for use with leads are not available for emails sent from opportunities.

Mass Email

Mass Email is not supported.

Mass Mail Merge

Mass Mail Merge is not supported. However, you can use merge fields on individual emails and add merge fields to templates.

Hyperlink Fields in Mail Merge

Hyperlink formula fields are not supported.

Email Activity

After you send an email, a task record is created. If you sent the email to a contact or lead, the task link is added to the Recent Activity feed for that record. If you sent the email to another email address (not a contact or lead), a link to the email is added to the Recent Activity feed of the record that was open when you sent the email. The task record doesn't include a link to access attachments sent with the email.

Email Templates

Email templates are available for administrators and users. Templates created in Salesforce Classic can't be used in Lightning Experience and vice versa.

Email templates in Lightning Experience use custom HTML. The other types (text, HTML with letterhead, and Visualforce) aren't supported.

All templates created in Lightning Experience are public. Any attachment in an email becomes public when that email is sent. Users no longer have to share the templates they create.

Email Attachments

If you don't have access to a file, you can't attach that file to an email or a template. If you select a template that has attached files, you need access to those files to send them. A file attached to an email is publicly available via a hyperlink when the email is sent.

Unresolved Items

The Unresolved Items link isn't available in Lightning Experience. After users add items to Salesforce using Email Connect, Salesforce for Outlook, or Email to Salesforce, items that can't be automatically assigned to Salesforce records are still sent to Unresolved Items. However, to assign those items to records or delete them, users must be prompted with a link by Salesforce for Outlook in Microsoft® Windows®, or switch to Salesforce Classic.

Automatic BCC

Automatic BCC, which lets users automatically receive copies of sent emails, is not available in Lightning Experience. Compliance BCC, which lets your organization automatically receive copies of sent email for compliance purposes, *is* available in Lightning Experience.

Work.com

Work.com sales-management and service-management tools aren't available in Lightning Experience. But Lightning Experience users can see thanks badges and skills endorsements that they've received in the feed.

Customer Service Features: Lightning Experience Limitations

Learn about the issues to expect if your organization uses customer service tools. In general, Service Cloud data and features aren't supported in this release of Lightning Experience. Cases are supported but don't have full parity with what's available in Salesforce Classic.

Cases

Case Layout

Cases look a little bit different than other records. Cases display a feed first rather than record details or related information, because support agents mainly collaborate and work with activities in a feed. Details appear next to the feed. You don't see the Activity or Collaboration tabs because this information displays directly in the feed.

If you turn off Case Feed, cases look like other records. Activities and collaboration appear, but the feed-first design disappears and adds more clicks and context-switching to cases. You can use collaboration (Chatter) instead of feed, but collaboration doesn't include useful case feed publishers, such as email, log a call, or change status.

Case Comments

Now you add comments to the feed instead of the Case Comments related list. You can't add comments to the related list in Lightning Experience. The comments that appear there are from Salesforce Classic users.

Case Related Lists

These related lists aren't available on cases: Case History, Case Milestones, Case Team, Contact Roles, External Sharing, Content Deliveries, Live Chat Transcripts, Related Content, and SOS Sessions.

Case Setup

To fully benefit from the new feed-first design on cases, re-create the standard case feed publishers. The standard publishers aren't available, but you can quickly re-create them as quick actions on the Case object. One benefit of re-creating the publishers as quick actions is that they appear on mobile devices, whereas standard case feed publishers don't.

Features Not Available in Lightning Experience

- Salesforce Call Center
- Knowledge Articles
- Omni-Channel
- Entitlements
- Milestones
- Macros

Unsupported Service Cloud Features

Except for basic Cases, Lightning Experience doesn't support any Service Cloud features, including the Salesforce Console.

For existing Salesforce to Salesforce customers, records shared by connections are available in the new user interface as long as their object type is supported in Lightning Experience.

Reports and Dashboards: Lightning Experience Limitations

Learn about the issues to expect when using reports and dashboards in Lightning Experience. Some Salesforce data and features aren't available in the new user interface. And some features don't have full parity with what's available in Salesforce Classic.

Reports

Features Not Available in Lightning Experience

Feature	Notes about Lightning Experience Availability
Joined Reports	
Schedule Report Refreshes	Users can't schedule report refreshes in Lightning Experience, but scheduled report refreshes from Salesforce Classic continue to work in Lightning Experience.
Print Reports	Lightning Experience doesn't offer a print option, but users can still print reports using their browser's **print** function.
Export Reports	
Row-Level Actions (Edit and Delete)	Although row-level actions aren't available in Lightning Experience, users can edit or delete a report when viewing it.
Subscribe to Reports	
Chatter Feed on Reports	
Show Details in Matrix Reports	
Add to Campaign	
Accessibility Mode for the Report Builder	Users with Accessibility Mode turned on must switch toSalesforce Classic to create and edit reports.

Features Available with Limitations in Lightning Experience

Feature	Notes about Lightning Experience Availability
Historical Trend Reporting	Historical trend reporting with charts is supported in Lightning Experience, but tabular views of historical trend reports aren't available.
Filters	These filters are available when building or editing a report, but are not shown in the filter panel when viewing a report. Even though the filters are not shown, they still filter the report. • Top N filters • Cross filters • Historical field filters • Standard filters (except for scope and date filters)

Other Notes about Using Reports in Lightning Experience

In the Lightning Experience Report Builder, save your report before running it or risk losing some changes. Specifically, be sure to save after adding:

- Formula fields
- Bucket fields
- Top N filters
- Cross filters

Dashboards

Features Not Available in Lightning Experience

Feature	Notes about Lightning Experience Availability
Create Filtered Dashboards	Users can view filtered dashboards, but they aren't filtered.
Create Dynamic Dashboards	Users can view dynamic dashboards, but must switch to Salesforce Classic to edit them.
Change a Dashboard's Running User	
Schedule Dashboard Refreshes	Users can't schedule dashboard refreshes in Lightning Experience, but scheduled dashboard refreshes from Salesforce Classic continue to work in Lightning Experience.
Row-Level Actions in List Views (Edit and Delete)	Although row-level actions aren't available in Lightning Experience, users can edit or delete a dashboard when viewing it.
Chatter Feed on Dashboards	
Post a Dashboard Component to Chatter	
Visualforce Components on Dashboards	
Accessibility Mode for the Dashboard Editor	Users with accessibility mode turned on can still create and edit Lightning Experience dashboards, but for a fully accessible experience they must switch to Salesforce Classic.

Other Notes about Using Dashboards in Lightning Experience

- After saving a dashboard in Lightning Experience, you can't edit it in Salesforce Classic. Instead of editing a Salesforce Classic dashboard in Lightning Experience, consider cloning the dashboard and editing the clone. That way, you can still edit the original dashboard in Salesforce Classic.

Folders

Features Not Available in Lightning Experience

Feature	Notes about Lightning Experience Availability
Standard Folders	

Feature	Notes about Lightning Experience Availability
Move Reports and Dashboards between Folders	
Create and Delete Report and Dashboard Folders	Folders created in Salesforce Classic and their contents are available in Lightning Experience. Users can save inside these folders when creating or cloning a report or dashboard.
Share Report and Dashboard Folders	Sharing permissions set on folders in Salesforce Classic are obeyed in Lightning Experience, but sharing permissions can't be set nor changed.
Search for Report and Dashboard Folders	Users can't search for report and dashboard folders in Lightning Experience. Global search results include reports and dashboards, but not report and dashboard folders.

Charts

Features Not Available in Lightning Experience

Feature	Notes about Lightning Experience Availability
Funnel Charts	Funnel charts from Salesforce Classic display as Bar Charts in Lightning Experience.
Scatter Charts	Scatter charts from Salesforce Classic display as Bar Charts in Lightning Experience.
Table Charts	Table charts from Salesforce Classic display as Bar Charts in Lightning Experience.
Multimetric Charts	Multimetric charts from Salesforce Classic show only one metric when viewed in Lightning Experience. For example, line bar charts (a type of multimetric chart) display as bar charts.
Pie Charts	Pie charts from Salesforce Classic display as donut charts in Lightning Experience.
Gauge Charts	Breakpoints in gauge charts only accept whole numbers. For example, `5` is a valid breakpoint, but `5.1` isn't.
Cumulative Line Charts	Cumulative line charts from Salesforce Classic display as Line Charts which aren't cumulative in Lightning Experience.
Chart Editor	In the chart editor, users can't: • Limit the set of report data drawn on the chart • Change sorting direction • Change measurement units (for example, from meters to centimeters) • Add more than two aggregates • Use charts from source reports

Other Notes about Using Charts in Lightning Experience

Feature	Notes about Lightning Experience Availability
Charts with More than 100 Dimensions	In Lightning Experience, if there are more than 100 dimensions, then: • Only the first 100 dimensions are drawn on the chart • Custom sorting set in Salesforce Classic is lost To avoid these limitations, consider setting report filters that return 100 or fewer dimensions.
Chart Colors	The standard Lightning Experience color palette replaces custom colors that users set in Salesforce Classic.

Files and Content: Lightning Experience Limitations

Learn about the issues to expect when using Salesforce Files and other content features in Lightning Experience. Some data and features aren't available in the new user interface. And some features don't have full parity with what's available in Salesforce Classic.

Salesforce Files

- Sharing Settings, Share with People, and Share with Groups aren't available in Lightning Experience. However, users can share files with people and groups by posting in feeds and @mentioning them. They can also view sharing settings for a file in the Shared With card in File Details.

- Sharing files with libraries isn't possible in Lightning Experience, but files in libraries are listed in Files home in Lightning Experience and when selecting a Salesforce file to attach to a feed post.

- Files and attachments are two different types of objects, and always have been. Files uploaded via the Notes & Attachments related list are simply files in Lightning Experience, but are attachments in Salesforce Classic. For existing organizations, this means that the Notes & Attachments list can contain a mix of attachments that were uploaded in Salesforce Classic and files added in Lightning Experience. Files added in Lightning Experience have the functionality of Salesforce Files, while attachments are associated only with the particular record and can't be shared further.

  In the API, any existing integrations that retrieve attachments from the Notes & Attachments list don't include any files uploaded to the list in Lightning Experience. A new API call is necessary to retrieve files as well as attachments.

- In Lightning Experience, the new Files related list allows users to upload files directly to the record; this isn't an option when accessing the Files related list in Salesforce Classic. Salesforce Classic users can see files in the related list that were uploaded from the list in Lightning Experience.

- Row-level actions (such as Edit or Delete) aren't available for the Files related list, Notes & Attachments related list, and Shared With related list in Lightning Experience. To manage files, use the row-level actions on Files home, or the quick actions on a file's detail page.

Files Connect

Users can't browse content in external data sources in Lightning Experience, but they can access external file references that were created in Salesforce Classic.

Features Not Available in Lightning Experience

- Documents
- Salesforce CRM Content, including creating and managing libraries, content deliveries, and sharing files with libraries
- File sharing with people and groups (except by posting to feeds)

- File syncing
- Freeze sharing (a new feature available only in Salesforce Classic in the Winter '16 release)

Chatter: Lightning Experience Limitations

Learn about the issues to expect when your users collaborate in Lightning Experience. Some Chatter features aren't supported. And some features don't have full parity with what's available in Salesforce Classic.

Feeds

Chatter Publisher

Users can compose these post types in Lightning Experience:

- Text posts, with or without a file attachment
- Polls
- Announcement posts in group feeds

Other post types, like Links and Thanks, aren't currently supported.

Sharing Posts

Users can't share posts with groups or followers.

Post and Comment Editing

Users can't edit posts or comments.

Rich Text Editor

The rich text editor isn't available in Lightning Experience. However, posts that users compose or edit with the rich text editor in Salesforce Classic display as formatted posts and comments in Lightning Experience.

Chatter Topics

Chatter Topics aren't available.

Chatter Questions

The Question action isn't available in Chatter, but existing questions do appear in the feed when viewed in Lightning Experience. Users still see best answers on a question and can select a best answer or post an answer.

Emoticons

Emoticons aren't available.

Highlighted Search Results

When a user runs a search on a feed, the keywords aren't highlighted in the search results.

Global Search Result Filters

Users can't filter global search results by feed.

Chatter Messages

Chatter Messages aren't available.

Chatter Settings in Setup

Salesforce admins using Lightning Experience have access to all settings on the Chatter Settings page in Setup. However, not all Chatter features are available in Lightning Experience. Changes to features that aren't available in Lightning Experience take effect only for users in Salesforce Classic.

People and Profiles

Unlike in Salesforce Classic, user profile pages display a banner photo at the top of the page. The photo is not currently editable.

These features aren't available when using people and profiles in Lightning Experience.

- All User list
- Chatter Influence
- Restrict visibility of Contact and About fields to employees, external users, or public (guest) users
- Add or reorder tabs on user profiles
- Moderator badge on profile photos
- Administrators can't add new actions to User Profile pages. Only Edit and User Detail options appear.

Groups

These features aren't available when using groups in Lightning Experience.

- View group recommendations on the group list view pages.
- Add records to groups using the Add Record action in customer groups, even if you or another administrator included the action in the group publisher.
- Create groups that allow customers (external users without licenses).
- Add customers to existing customer groups that were created in Salesforce Classic.
- View the group email address or the Post by email link.

  Users can still email the group to post to the group via email if they know or have saved the group email address from Salesforce Classic.

- Access Chatter-wide notification settings from the group notification settings.
- Remove files from the group files list.

Other Salesforce Products: Lightning Experience Limitations

These Salesforce products aren't available in this release of Lightning Experience.

- Salesforce Communities (however, communities use the Lightning Experience login experience)
- Community Builder
- Pardot
- RelateIQ

Navigation and Actions: Lightning Experience Limitations

Learn about the issues to expect when navigating and using actions in Lightning Experience. Some Salesforce features aren't available in the new user interface. And some features don't have full parity with what's available in Salesforce Classic.

Navigation

Navigation Menu Replaces the Tab Bar
   The concept of *tabs* to represent objects doesn't exist in Lightning Experience. The new interface updates the old Salesforce Classic tab bar with a collapsible navigation menu that's located along the left side of the page. Use the navigation menu to access the standard Salesforce objects that are available in Lightning Experience, as well as Home, Chatter items (the main feed, people, and groups), files, dashboards, reports, and the user's task list and calendar.

Apps and Custom Objects Available from the App Launcher Only

Apps (sometimes called *tabset apps*) and custom objects are available in Lightning Experience, but they aren't included in the navigation menu for this release. Instead, use the App Launcher by clicking ▦ in the header. Custom objects appear in the list of **Other Items**.

Even though Lightning Experience doesn't use the Salesforce Classic tab paradigm, you still need to create custom object tabs to ensure that your custom objects are available in the new interface.

Open Links in New Browser Windows or Tabs

In general, Lightning Experience supports right-click and Windows or Mac keyboard shortcuts to open links in new browser windows or tabs. But there are some areas of the app where these options aren't supported, including:

- Links in the Top Deals and Recent Records cards on Home
- Action icons, buttons, and menu items on records
- Links to Notes
- View Report links on dashboards
- Links on the Lightning Experience Setup page

Actions and Buttons

These actions and buttons aren't available in Lightning Experience.

- Deep Clone
- Mass Delete
- Mass actions on object home pages and list views
- Data import tools on object home pages
- Sharing buttons
- Custom buttons that define the content source as `URL` or `OnClick JavaScript`
- Custom links with parameters for filling in form fields

Search: Lightning Experience Limitations

Learn about the issues to expect when searching in Lightning Experience. Some search-related features aren't available in the new user interface. And some features don't have full parity with what's available in Salesforce Classic.

Searchable Objects

Only the following objects can be found in search results: Account, Attachment, Case, Chatter Feed, Chatter Groups, Contact, Custom Objects, Dashboard, Document, File, Lead, Note, Opportunity, People, Price Book, Product, and Report. Task and Event items aren't searchable.

Search Results Can't Be Filtered or Sorted

The "exact phrase" and "limit to items I own" filter options aren't available on search results pages. In addition, you can't sort or filter search results. If a text field in the search results is too long for the column width, you can't see the full text in the search results. You can't expand the column widths.

For lookups, user-defined lookup filter fields and admin-defined dependent lookup filters aren't supported.

Top Results Instead of Search All

There isn't a **Search All** option in search results. Top Results displays the most relevant records grouped by your most frequently used objects. If an object isn't visible on the Top Results page, use the More drop-down menu, which alphabetically lists all available objects.

No Sidebar or Advanced Search

To search, use the global search bar in the header in Lightning Experience.

No Pinning on the Search Scope Bar

You can't pin or change the order of the objects listed on the search scope bar beneath the global search box. The search scope bar automatically lists your most frequently used objects. Objects pinned in Salesforce Classic affect the search scope bar in Lightning Experience.

Lookup Dialog Search Requires 2 Characters

To perform a full search, enter a minimum of 2 characters.

External Object Search Results Limited to 25 Items

When you perform a search for an external object, search only displays the top 25 results.

Applications Doesn't Support Wildcard Searches

You can't use wildcards to perform a partially matching search for Applications, or when searching from the App Launcher.

Search Results Used for Global and Lookup Dialog Search Layouts

To change the fields shown as columns in the global search and lookup dialog search results, use the **Search Results** search layout on an object detail page within the Object Manager. The other search layouts (Lookup Dialogs, Lookup Phone Dialogs, Tab, List Views, and Search Filter Fields) aren't applicable in Lightning Experience.

New Button in Lookup Dialog Search Doesn't Support All Objects

In Lightning Experience, you can create these objects from lookup dialog search windows: accounts, cases, contacts, events, leads, notes, opportunities, tasks, price books, and products. For other objects, including custom objects, create the desired object or record before using the lookup dialog search to associate records.

Salesforce Setup: Lightning Experience Limitations

Lightning Experience doesn't support a few aspects of your basic Salesforce setup. And the Setup tree in Lightning Experience doesn't include all of the setup pages that are available in Salesforce Classic.

- Information about an org's Salesforce edition isn't visible in Lightning Experience.

- Advanced currency management, or dated exchange rates, isn't supported in general. But opportunities display the correct amount if the `Close Date` field is on a page layout for opportunities. Because page layouts control who sees what on object records, only users who have this page layout assigned to them see the correct amount.

- Languages that are read right to left, including Arabic and Hebrew, aren't supported. All other Salesforce-supported locales and languages are supported.

Setup Tree

The Setup tree in Lightning Experience is limited to:

- Pages that support Lightning Experience features

- Administration pages that apply across your organization, such as company settings, security, user management, and mobile app setup

To access other setup pages, such as those for Service Cloud features, use the Setup tree in Salesforce Classic.

Advanced setup search isn't available in Lightning Experience.

Data Import and Management: Lightning Experience Limitations

Learn about the issues to expect when importing and managing data in Lightning Experience. Some Salesforce features aren't available in the new user interface. And some features don't have full parity with what's available in Salesforce Classic.

Data Import

These legacy data import tools aren't available in Lightning Experience:

- Accounts & Contacts
- Leads
- Solutions
- Custom Objects

Use the Data Import Wizard if you're importing fewer than 50,000 records. Use the Data Loader if you're importing more than 50,000 records.

Data Management

- With the exception of Duplicate Management, Data.com features aren't supported in Lightning Experience.
- Field Audit Trail isn't supported.

Process Automation: Lightning Experience Limitations

Learn about the issues to expect when using process automation features in Lightning Experience. Process Builder and Workflow are fully supported. Visual Workflow and Approvals are also supported but have some limitations.

Pending Approval Requests

Users can see approval requests from either their notifications or through the Approval History related list on the record that needs to be approved.

To see the complete list of requests that are waiting for a user's approval, the user must switch to Salesforce Classic (or use the Salesforce1 mobile app).

Paused Flow Interviews

To resume paused flow interviews, your users must switch to Salesforce Classic or use Salesforce1.

Flow Distribution

How you distribute flows to your users depends on whether the relevant feature is available in Lightning Experience. For example, URL-based custom buttons aren't supported, but Visualforce pages are.

Security: Lightning Experience Limitations

Learn about the issues to expect for Salesforce security features in Lightning Experience. Some features aren't available in the new user interface. And some features don't have full parity with what's available in Salesforce Classic.

Sharing Settings

Lightning Experience respects your organization's sharing rules. The Sharing Settings page is available in Setup in Lightning Experience, but some options don't apply in Lightning Experience.

Community User Visibility

This checkbox enables community users to be visible to other users in the community or only to those users above them in the role hierarchy. Communities are available in Salesforce Classic only.

Manager Groups

> This checkbox enables or disables record sharing with managers and manager subordinates groups which is available via sharing rules, manual sharing, and Apex managed sharing. Manual sharing via the **Sharing** button is available in Salesforce Classic only.

Manual User Record Sharing

> This checkbox enables or disables manual sharing on user records via the **Sharing** button. This button is available in Salesforce Classic only.

Portal User Visibility

> This checkbox enables portal users to be visible to other portal users in the same account or only to those users above them in the role hierarchy. Portals are available in Salesforce Classic only.

Session Security Levels

If your org sets a policy that requires a high-assurance session to access reports and dashboards, users with a standard assurance session are blocked from reports and dashboards in Lightning Experience. Also, the Reports and Dashboards items don't appear in the navigation menu. In Lightning Experience, you can't raise the session level to high assurance by redirecting the user to complete two-factor authentication.

As a workaround, users with a standard assurance session can log out and log in again using an authentication method that is defined as high assurance by your organization. They then have access to reports and dashboards. Alternatively, they can switch to Salesforce Classic, where they are prompted to raise the session level when they attempt to access reports and dashboards.

Session Privilege Levels

Sessions obtained in a Lightning Experience context, by using `$Api.Session_ID` or `GETSESSIONID()`, have similar privileges to the Lightning session. As with the Lightning session, you can't use these session IDs to make API calls.

Point-and-Click Customization: Lightning Experience Limitations

Many of your point-and-click customizations work seamlessly in Lightning Experience. But some customizations don't apply or aren't supported in the new interface.

- The Force.com Quick Access menu, with shortcuts to various app and object customization features, isn't available.
- You can't apply custom branding, including custom logos or colors, to the new interface.
- You can't add items to or delete items from the navigation menu, or rearrange the default set of items. The Lightning Experience navigation menu isn't controlled or affected by any customizations that you make to the Salesforce1 mobile app's navigation menu.
- Custom buttons that use a URL or JavaScript content source aren't supported in Lightning Experience. You can replace some of the functions covered by these buttons by using point-and-click tools like Process Builder, Visual Workflow, or code-driven approaches.
- Custom links with parameters for filling in form fields aren't supported.
- You can't define custom field-level help text or add field-level help for fields in custom objects.
- You can't customize items in the help menus on Lightning Experience pages. However, if you created custom help for "Help for this Page" links in Salesforce Classic, these links continue to display your help when classic pages are embedded in the new user interface, such as in the Setup tree.

Object-Specific Customizations

An object-specific customization is something that you create for a given object. Examples include fields, page layouts, record types, and Apex triggers. Most object-specific customizations are available in the Object Manager instead of directly from the Setup tree. From Setup, enter `Object Manager` in the `Quick Find` box, then select **Object Manager**.

> **Note:** Objects don't appear in the Object Manager—or anywhere in Setup—if they're related to features that aren't supported in Lightning Experience, such as case milestones.

Standard Fields

To edit standard fields, click the field name, and then click **Edit**. Unlike in Salesforce Classic, you can't edit standard fields directly from the object detail page.

Page Layouts

Record page customizations made in Salesforce Classic—for custom and standard objects—also affect record pages in Lightning Experience. However, some page elements display differently in Lightning Experience, and some aren't supported.

You can't access page layouts for user profiles from Lightning Experience.

Cases have a special related list dedicated to case close page layouts.

These page layout elements aren't supported in Lightning Experience:

- Blank spaces
- Expanded lookups
- Mobile cards
- S-controls
- Sections
- Tags

You can't use the enhanced page layout editor to customize the layout of record pages when viewed in Lightning Experience. All Lightning Experience users see the same record layout, regardless of profile or record type.

Triggers

Triggers appear in the Object Manager only if you have the "Author Apex" user permission.

Triggers for some standard objects don't appear in the Object Manager. Access those triggers directly from the Setup Quick Find box.

Field Sets

Field sets aren't available in Lightning Experience. If you or someone in your organization created a field set while using Salesforce Classic, you see the global variable for field sets in places such as formula fields and Visualforce pages, but you can't manage them in Lightning Experience.

Apex Sharing Rules

Not available in Lightning Experience.

Apex Sharing Recalculations

Not available in Lightning Experience.

SEE ALSO:

[Object Customizations That Aren't in the Object Manager](#)

Object Customizations That Aren't in the Object Manager

The Object Manager doesn't include some object customizations for standard objects, such as triggers for case comments. Access these object customizations via the `Quick Find` box. For example, from Setup, enter `Case Comment` in the `Quick Find` box, then select **Case Comment Triggers**.

- Case Comment Triggers
- Email Message Triggers

- FeedComment Triggers
- FeedItem Triggers
- Feed Item Layouts
- Group Layouts
- Group Triggers
- Group Member Triggers
- Group Record Triggers
- Publisher Layouts
- Topic Triggers
- TopicAssignment Triggers

Programmatic Customization: Lightning Experience Limitations

Many of your programmatic customizations work in Lightning Experience. But the new interface affects the way some features, such as Lightning Pages and Visualforce, behave.

Lightning Pages

Lightning Page tabs and custom Lightning Pages are currently available for the Salesforce1 mobile app only, and aren't available in Lightning Experience.

Visualforce

This release contains a beta version of Visualforce for Lightning Experience that is production quality but has known limitations. Here are some of the most important considerations for organizations that have customized Salesforce with Visualforce. For complete details, score yourself a new developer badge by completing Visualforce & Lightning Experience in Trailhead.

Visualforce Is Wrapped in an iframe in Lightning Experience
> In Salesforce Classic, Visualforce owns the entire page. In Lightning Experience, it's wrapped in an embedded iframe instead. This wrapper has a number of effects, and it's the main reason why a whole Trailhead module is devoted to covering the details.

`sforce.one` No Longer Used Just for Salesforce1
> The `sforce.one` JavaScript utility object used to be available only on Visualforce pages when running in Salesforce1. If your organization enables Lightning Experience, it's also added to pages when running in Lightning Experience. If you've written code that makes assumptions about what the presence of `sforce.one` means, you might need to update it.

You Can't Set `window.location`
> A common technique in JavaScript to navigate to a new page is to manipulate the `window.location` value. This technique isn't possible in Lightning Experience. Use the `sforce.one` navigation methods instead.

Object List Action Override Isn't Accessible
> The object list action, one of the six standard actions you can override with a Visualforce page, isn't accessible in Lightning Experience. You can still override it, but your users can't access it.

Lightning Experience App User Interface Is Always Visible
> When running in Lightning Experience, Visualforce pages ignore the `<apex:page>` `showHeader` and `showSidebar` attributes. You can't suppress the Lightning Experience header and sidebar.

Page Title Can't Be Set
> The `<apex:page>` `title` attribute has no effect.

Home Doesn't Support Visualforce
> The new Home in Lightning Experience can't be customized, so you can't add Visualforce elements to it.

Navigation Menu Doesn't Support Visualforce
> Your can't customize the navigation menu, so you can't add Visualforce items to it. Use the App Launcher instead.

Session Privilege Levels

Sessions obtained in a Lightning Experience context, by using `$Api.Session_ID` or `GETSESSIONID()`, have similar privileges to the Lightning session. As with the Lightning session, you can't use these session IDs to make API calls.

Apps and Packaging: Lightning Experience Limitations

Apps on the AppExchange that are certified as Lightning Ready are supported in Lightning Experience. You can install and manage packages in Lightning Experience, but other packaging features aren't supported. ISVforce apps aren't supported either.

AppExchange

Some apps on the AppExchange are supported in Lightning Experience. If an app is supported, a *Lightning Ready* sash appears on its AppExchange listing. If an app isn't supported, use it in Salesforce Classic instead.

Apps without Lightning Ready certification can be used in Lightning Experience, but some features may not be available or work as expected. These apps may also appear visually inconsistent with Lightning Experience because they use Salesforce Classic styling. For the best experience, use Salesforce Classic for apps that aren't certified as Lightning Ready.

Packaging

You can install packages in Lightning Experience. But for packages that are already installed, you can't assign licenses to users from Lightning Experience. If you need to assign a license, switch to Salesforce Classic.

These packaging features aren't supported in Lightning Experience.

- Create a package
- Upload a package
- Upgrade a package
- Deprecate a package version
- Create branch or patch organizations

ISVforce Apps

Unsupported Features for ISVforce
> These ISVforce features aren't supported in Lightning Experience.
>
> - Channel Order App
> - Environment Hub
> - Trialforce
> - Usage Metrics Visualization App

What to Expect in Lightning Experience When Chatter Is Turned Off

If your organization doesn't use Chatter, several useful aspects of the Lightning Experience interface aren't available. Learn how Lightning Experience changes, and see if you're losing functionality that you'd rather not live without.

If you turn off Chatter for your entire organization or for a subset of users via permission sets:

- Feeds and groups aren't available.

- User profiles are still available, but feeds, groups, and files aren't available on profiles.

- The Collaboration tab isn't available on records.

- Users can't follow records or other users.

- Users can't add attachments in the email composer, from Salesforce Files or a local drive.

- The enhanced Notes tool, including the Notes related list, isn't available. However, notes created with the old note-taking tool in Salesforce Classic are available for viewing in Lightning Experience from the Notes & Attachments related list.

- Salesforce Files (including the Files related list) isn't available.

  This means users can't upload files in Lightning Experience, including from the Notes & Attachments related list. However, this related list still displays files that were uploaded as attachments from Salesforce Classic.

- Salesforce Files Connect and related external data sources aren't available.

EDITIONS

Chatter available in Lightning Experience in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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