Evaluate and Roll Out Lightning Experience for Your Org

Salesforce, Winter ’17

@salesforcedocs

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CONTENTS

EVALUATE AND ROLL OUT LIGHTNING EXPERIENCE FOR YOUR ORG

It's here ... the new Salesforce user experience! Lightning Experience is a completely reimagined interface. Even better, it's built on our UI platform, so the experience can grow and evolve with your needs.

As an admin, you are your company's trusted advisor for all things Salesforce and you'll help decide when to roll out Lightning Experience to your org. This guide contains the details you need to evaluate the new interface and decide if it meets the needs of some or all of your users. When you're ready, you'll be prepared to act on your rollout plan and make the switch to Lightning Experience.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

What Makes Lightning Experience So Special?

Welcome to Lightning Experience, the new, fast, beautiful user experience from Salesforce. With a sales-centric mindset, we focused on reinventing the desktop environment to better support your sales process. The result is an intuitive, intelligent interface that helps sales reps work more naturally and close more deals faster. Let's take a peek at some of the key features of the new interface so that you can decide if Lightning Experience is right for some or all of your users.

Is Lightning Experience Right for Your Salesforce Org?

So you're intrigued and excited about Lightning Experience! The new interface clearly offers numerous benefits for sales teams. But Salesforce is a deep well, and we can't rebuild everything at once. This release doesn't have complete parity with Salesforce Classic, the full-featured Salesforce predecessor. Let's look at some use cases, see how Lightning Experience compares to Salesforce Classic to help you decide if now is the right time to switch, and even see a preview of your org in the new interface.

Transition to Lightning Experience: Let's Do This!

Great! You've decided you're ready to switch to Lightning Experience. First, we recommend that you develop a strategy to guide your rollout. Then, when the time is right, here's how to enable the new user interface.

Find Your Way Around Lightning Experience

Feeling a little discombobulated by all the Lightning Experience newness? Perfectly understandable. Diving into a redesigned app can be disorienting—especially when you're able to work in the original interface with your eyes closed. To hone your Lightning Experience chops, let's look at where some of the most common Salesforce features landed in the new interface.

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.

Lightning Experience Info Center

Check out these resources to learn about using Lightning Experience, setting it up for your organization, or developing for the new user interface.

Lightning Experience Roadmap

Lightning Experience was built on feedback from more than 150,000 customers. And now that it's live, we've been collecting your ideas, comments, and requests to help us drive Lightning Experience forward. Here are some features and ideas we're working on.

SEE ALSO:

Trailhead: Admin Trail - Migrating to Lightning Experience
Trailhead: Developer Trail - Lightning Experience

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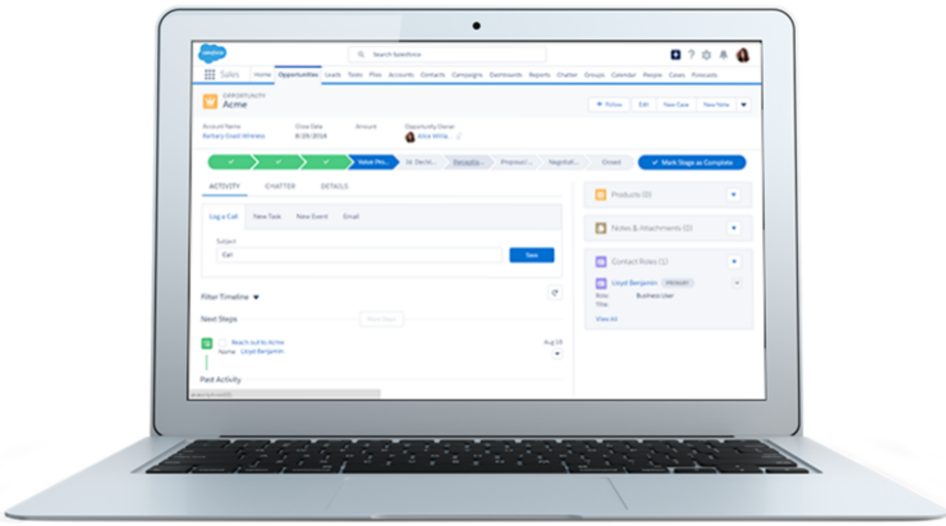

Feature	Why It's Cool
Lightning Apps	Lightning Experience navigation makes your users more efficient by allowing them to complete actions and access recent records and lists directly from the navigation bar. Your users can switch between apps that you can brand with a custom logo, color, and description.
Home	Start the day on the new, intelligent home page. Monitor performance to goal, and get news on key accounts. And stay on track by seeing exactly what needs doing in the Assistant.
Opportunity Workspace	Drive the right behaviors at every stage of your sales process from this action-optimized workspace. You can customize coaching scripts for each step. And reps can work their deals more efficiently using the handy composer to quickly log calls, create tasks, send emails, and more.
Kanban	Visually review the status of leads, opportunities, contracts, and campaigns. Users can drag records from one status to another. For opportunities, user can get alerts when an action is needed on a key deal.
Composer Windows	Breeze through those minor but important activities that inevitably crop up during the day without switching context. Get a call from a customer while reviewing a report? It's no problem to quickly log the call—without needing to search for the related deal or switch to a different record. Composer windows open on the current page and let users log calls and create events, tasks, and notes that can be related to any record.

Feature	Why It's Cool
Activity Timeline and Task List	See open tasks, planned meetings, and accomplishments in the activity timeline on each opportunity, lead, account, and contact. Or use the task list to see the details of specific tasks alongside the full list of open tasks, tasks due today, and closed tasks. Managers can use the Delegated view to see tasks assigned to people below them in the role hierarchy.
Accounts and Contacts	Find information and see news at a glance from the new layout. Get the latest news about customers with integrated Twitter and news for customers, review upcoming and completed activities, and keep data clean with field-level duplicate matching.
Enhanced Notes	Take better notes with auto-save, rich text capabilities, inline images, and versioning. You can even relate a note to multiple records and share notes with teammates or Chatter groups.
Lightning Voice	Use phone features without ever leaving Salesforce. You can make and receive calls, add call notes, and log call information with ease.
Integrated Email	Send email through Gmail or Office 365 accounts with your Salesforce email. See the emails you've sent in your Gmail or Office 365 Sent Items folder for seamless integration. With Enhanced Email, you can relate emails to multiple contacts, leads, and users, and to a single opportunity, campaign, case, account, or person account.
File Preview Player	Enjoy a richer file preview experience that doesn't require Adobe Flash Player. Vector-based preview images render in higher quality and don't degrade on high-resolution screens, plus they load faster. New controls allow scrolling through multi-page documents, previewing animated GIFs, giving full-screen presentations, and accessing file actions.
Reports and Dashboards	Get more from your data. The new report run page is easier to read and filter. Animated, interactive charts bring your organization's data to life. And a new dashboard editor supports flexible layouts and components that span columns and rows.
List Views	Seamlessly create and edit custom list views to rapidly find relevant data. See data faster with more intuitive list views, and search on-the-fly for a specific list view. Visualize data with handy list view charts, or apply filters to slice the data as needed.
Search	Find records faster with improved search, which includes recent records and top results.
Setup Tree and Object Manager	Navigate setup pages with a simplified organization and a cleaner look and feel. Use the new Object Manager, which combines all standard and custom objects into a single list that is more easily searchable.

Is Lightning Experience Right for Your Salesforce Org?

So you're intrigued and excited about Lightning Experience! The new interface clearly offers numerous benefits for sales teams. But Salesforce is a deep well, and we can't rebuild everything at once. This release doesn't have complete parity with Salesforce Classic, the full-featured Salesforce predecessor. Let's look at some use cases, see how Lightning Experience compares to Salesforce Classic to help you decide if now is the right time to switch, and even see a preview of your org in the new interface.

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Currently, Lightning Experience is geared toward sales teams, so most features from other Clouds aren't available yet. And some Sales features aren't available either. Although Lightning Experience will expand to include more features in upcoming releases, evaluate how important these upcoming features are to your business needs right now.

Keep in mind that you can enable Lightning Experience for a subset of your users. This flexibility means you can move your Sales team to the new interface now, but have your Service org continue using Salesforce Classic. Or you can opt to run a Lightning Experience pilot with a small group of users without disrupting everyone else until you know that the new experience provides what you need.

Saying Hello to Lightning Experience Doesn't Mean Saying Goodbye to Salesforce Classic

Salesforce Classic is still here, and we've made it easy for Lightning Experience users to move between the old and the new. So even if Lightning Experience isn't a perfect fit yet, you and your users can try it on for size without losing out.

Supported Editions and User Licenses for Lightning Experience

Let's look at the supported editions and user licenses to see if your organization can enable and use Lightning Experience.

Best Use Cases for Lightning Experience

Let's look at the types of organizations that are a good fit for this release of Lightning Experience. And also some uses cases that might not be suitable just yet.

Compare Lightning Experience and Salesforce Classic

Understanding what you get—and don't get—in the new interface is a big part of the decision to switch to Lightning Experience. Here are some highlights of how Lightning Experience compares to what you're used to in Salesforce Classic.

What's the Fate of Existing Salesforce Customizations?

We've worked hard to respect your existing configurations and customizations in Lightning Experience. Many of your point-and-click and programmatic implementations also work seamlessly in the new interface. However, some customizations don't apply in the new interface or require updating to take advantage of all that Lightning Experience has to offer. Here are some issues to consider.

Preview Your Org in Lightning Experience

This is probably the point where you're thinking: "Yeah, yeah, yeah, but I want to see this thing." But you're not ready to switch your users over yet, so quandary, right? Nope! Lightning Experience Migration Assistant to the rescue. The Migration Assistant's Preview feature lets you explore your production org in Lightning Experience, so you can see exactly how your real data and your current customizations work in the new interface. Without disrupting anyone.

See If Your Org Is Ready for Lightning with the Lightning Experience Readiness Check

Curious about whether Lightning Experience is right for your company? The Lightning Experience Readiness Check evaluates your org and generates a report showing whether the features you use in your org are supported in Lightning.

SEE ALSO:

Supported Editions and User Licenses for Lightning Experience

Lightning Experience Considerations

Saying Hello to Lightning Experience Doesn't Mean Saying Goodbye to Salesforce Classic

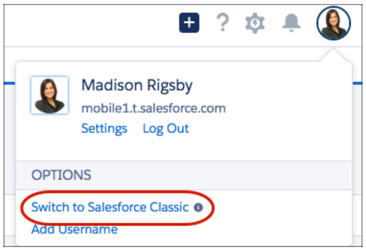
EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce Classic is still here, and we've made it easy for Lightning Experience users to move between the old and the new. So even if Lightning Experience isn't a perfect fit yet, you and your users can try it on for size without losing out.

When you enable users for Lightning Experience, you can set it up so some or all of them immediately get the new interface as their default, *preferred* experience. Ideally, your Lightning Experience users find that the new interface meets all their needs. But if there's an important feature or tool back in the classic interface, users can switch to Salesforce Classic at any time, without assistance from you.

To head back to Salesforce Classic, use the Switcher. In the Lightning Experience header, click the profile picture and select **Switch to Salesforce Classic**.



The Switcher changes the default preference to Salesforce Classic. The user remains in the classic interface until using the Switcher to return to Lightning Experience. And then the new interface becomes the default preference. You get the idea.

To find the Switcher in Salesforce Classic, click the name in the upper-right corner, then select **Switch to Lightning Experience**.

Knowing that your users can switch between interfaces makes it easier for you to decide when to start using Lightning Experience. If Lightning Experience is missing only a few features that your team uses occasionally, your users can switch back to Salesforce Classic to use them. It's probably an acceptable trade-off given the benefits of the new experience. But, if users need daily access to unsupported sales features or service features, it's best to keep users in Salesforce Classic—at least for now.

SEE ALSO:

Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

Supported Editions and User Licenses for Lightning Experience

Let's look at the supported editions and user licenses to see if your organization can enable and use Lightning Experience.

Editions	
Supported Editions	• Group Edition • Professional Edition • Enterprise Edition • Performance Edition • Unlimited Edition • Developer Edition
Unsupported Editions	• Personal Edition • Contact Manager Edition • Database.com Edition

Editions	
	• Chatter.com Edition

User Licenses	
Supported Licenses	• Salesforce • All Salesforce Platform and Force.com (excluding Force.com Free) • Identity User • Company (Employee) Community • Chatter External • Chatter Plus • Chatter Free
Unsupported Licenses	• Customer Community, Customer Community Plus, Partner Community • All Portal licenses • Force.com Free • Data.com • Work.com • Database.com • Content Only • Ideas Only • Knowledge Only • Site.com Only

Best Use Cases for Lightning Experience

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Let's look at the types of organizations that are a good fit for this release of Lightning Experience. And also some uses cases that might not be suitable just yet.

Consider using Lightning Experience for some or all of your organization if:

- Your sales team does business-to-business sales using accounts, contacts, leads, opportunities, custom objects, and the other sales features supported in the new user interface.
- You want to pilot the new user interface with a group of sales reps.
- You're looking to reboot your Salesforce implementation. This is a great opportunity to introduce new features because you're doing change management anyway.

Consider sticking with Salesforce Classic if:

- Your sales team makes regular use of features that aren't yet available in Lightning Experience, such as forecasting, or territory management.
- You primarily use customer service tools or other non-sales features.
- You want a single experience for your sales and service teams.

Compare Lightning Experience and Salesforce Classic

Understanding what you get—and don't get—in the new interface is a big part of the decision to switch to Lightning Experience. Here are some highlights of how Lightning Experience compares to what you're used to in Salesforce Classic.

Note: These lists aren't a complete view of what's not available in Lightning Experience. Also read Lightning Experience Considerations to help make your decision.

Salesforce Data

Feature	Lightning Experience	Salesforce Classic
Sales objects: Accounts, Campaigns, Contacts, Leads, Opportunities, Person Accounts, Price Books, Products	✔	✔
Calendar, Events, Tasks	✔	✔
Service objects: Assets, basic Cases, Work Orders	✔	✔
Custom objects	✔	✔
Chatter feeds, groups, and people	✔	✔
Salesforce Files	✔	✔
Other Sales and Service objects		✔

Home

Feature	Lightning Experience	Salesforce Classic
Performance chart	✔	
Assistant	✔	
News	✔	
Top deals	✔	
Tasks	✔	✔
Events*	✔	✔
Calendar*	✔	✔
Feed and publisher		✔
Items to approve		✔
Customizable dashboards	✔	✔
Customizable home page components	✔	✔

* In Lightning Experience, Home displays only events remaining on a user's calendar today. Users can access all their events from the Calendar tab in the navigation bar.

Accounts and Contacts

Feature	Lightning Experience	Salesforce Classic
News	✓	
Activity Timeline	✓	
Enhanced Notes	✓	
"Reference" page layout	✓	
Related lists	✓	✓
Integrated email and templates	✓	✓
Twitter highlights	✓	✓
Person Accounts	✓ (Beta Support)	✓
Account teams	✓	✓
Account and contact hierarchy		✓
Contacts to Multiple Accounts	✓	✓

Campaigns (Beta)

Feature	Lightning Experience	Salesforce Classic
Campaign member status charts	✓	
Import campaign members	✓	✓
Add individual campaign members	✓	✓
Campaign member status updates via import	✓	✓
Clone campaign members		✓
Add and manage campaign members from a list view		✓

Leads

Feature	Lightning Experience	Salesforce Classic
Workspace page layout	✓	

Feature	Lightning Experience	Salesforce Classic
Activity Timeline	✓	
Sales Path	✓	
News	✓	
Enhanced Notes	✓	
Change lead owner to a queue	✓	✓
Integrated email and templates	✓	✓
Lead conversion customization via the API	✓	✓
Find and merge duplicate leads		✓

Opportunities

Feature	Lightning Experience	Salesforce Classic
Workspace page layout	✓	
Activity Timeline	✓	
Sales Path	✓	
News	✓	
Enhanced Notes	✓	
Visual view of opportunities (Kanban)	✓	
Integrated email and templates	✓	✓
Opportunity teams	✓	✓
Opportunity splits		✓
Similar opportunities		✓
Big deal alerts		✓

Data.com

Feature	Lightning Experience	Salesforce Classic
Prospect for contacts and companies	✓	✓
Clean status of clean rules	✓	✓
See how clean rules are working	✓	✓
Add Data.com contacts as leads		✓

Reports

Feature	Lightning Experience	Salesforce Classic
Enhanced report charts	✓	
Hide totals and subgroups from report view	✓	
Interactive filters when viewing reports	✓	
Report Builder	✓	✓
Bucket fields	✓	✓
Custom summary formulas	✓	✓
Matrix, Summary, Tabular report formats*	✓	✓
Role hierarchy filters	✓	✓
Create report folders		✓
Joined reports		✓
Pie charts		✓
Schedule report refreshes**	✓	✓
Follow reports		✓
Report notifications		✓
Export reports	✓	✓

* You can't set up folder sharing in Lightning Experience; however, folders that were created in Salesforce Classic inherit all assigned permissions when viewed in Lightning Experience. **Available in Lightning Experience by Subscribing to a report.

Dashboards

Feature	Lightning Experience	Salesforce Classic
Display more than 3 columns	✓	
Dashboard Builder	✓	✓
View filtered dashboards	✓	✓
View dynamic dashboards	✓	✓
Schedule dashboard refreshes*		✓
Post dashboard components to feeds		✓
Follow dashboards		✓
Visualforce components		✓

* Users can't schedule dashboards in Lightning Experience, but dashboards scheduled in Salesforce Classic run as expected in Lightning Experience.

List Views

Feature	Lightning Experience	Salesforce Classic
Charts	✓	
Create filters on the fly	✓	
Search for a list view on the fly	✓	
Create and edit lists	✓	✓
Sortable columns	✓	✓
Resizable columns	✓	✓
Sharing Settings*	✓	✓
Filter logic	✓	✓
Inline editing	✓	✓

* In Lightning Experience, sharing list views marked as "Visible only to me" or "Visible to all users" is supported. Sharing with certain groups of users isn't supported.

Other Features and Products

Feature	Lightning Experience	Salesforce Classic
Custom branding of Salesforce apps	✓	
Activities-related composer windows	✓	
Create and edit records	✓	✓
Inline editing record detail fields	✓	✓
Inline editing in lists	✓	✓
Forecasting		✓
Territory Management		✓
Salesforce Communities*	✓	✓
Partner Portals		✓
Service Cloud		✓
Work.com		✓

* The header used to switch between Setup and communities is only available in Salesforce Classic.

What's the Fate of Existing Salesforce Customizations?

We've worked hard to respect your existing configurations and customizations in Lightning Experience. Many of your point-and-click and programmatic implementations also work seamlessly in the new interface. However, some customizations don't apply in the new interface or require updating to take advantage of all that Lightning Experience has to offer. Here are some issues to consider.

Lightning Experience Navigation Bar

Similar to Salesforce Classic, the navigation bar in Lightning Experience gives your users access to sets of objects and tabs. Think of the navigation bar as a container, where the items within it change to represent the app you're using. The apps you made for Salesforce Classic work in Lightning Experience without any modifications. When you create a new app or upgrade a Classic app in Lightning Experience, you can even brand the app with a custom color and logo.

In Lightning Experience, customize your apps with:

- A unique color and logo
- Standard and custom objects
- Lightning component tabs
- Visualforce tabs
- Lightning Page tabs
- Utility features, like integrated voice, in the Lightning Experience footer

Page Layouts and Compact 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.

Tip: You can create a custom Lightning Experience record page with the Lightning App Builder, and assign different record pages to different Lightning apps.

Compact layouts play the same role in Lightning Experience that they do for the Salesforce1 mobile app: displaying a record's key fields in the highlights panel on a record page. In Lightning Experience, the highlights panel shows the first five fields from your current compact layouts.

If your org uses utility features, you can enable a utility bar in your app that allows instant access to productivity tools, like integrated voice, in the footer of Lightning Experience.

Actions and Buttons

If you've already created and used actions in Salesforce Classic, you know that they appear in the Chatter publisher, while standard and custom buttons appear above the details on a record page. And if you use Salesforce1, you know that all action types and buttons are co-mingled on the Salesforce1 action bar. In Lightning Experience, we continue to blur the line between actions and buttons. But instead of displaying in a single place, actions and buttons are grouped by type in several different areas on the record page.

By default, Lightning Experience includes the actions and buttons defined in the Salesforce1 and Lightning Experience Actions section on the global publisher layout. Or you can customize what's available using the same section on object page layouts. Here's the logic that determines where on the record page an action or button appears.

- Global actions with the Log a Call action type or the Create a Record action type for events, notes, and tasks display in the Global Actions menu in the header.

- Most quick actions, productivity actions, standard buttons, and supported custom buttons are added to the page-level action menu.
- Object-specific activities-related actions, such as Log a Call, New Event, New Task, and Email, display in the composer on the Activity tab.
- Standard Chatter actions appear in the composer on the Collaborate tab.

The order of actions in each area is based on the order in which they've been added to the global publisher or object page layout.

To learn more, see Actions in Lightning Experience in the Salesforce Help.

Custom Buttons

Custom buttons that use a JavaScript content source aren't supported in Lightning Experience. You can replace some of the functions covered by these buttons by using Lightning component actions, point-and-click tools like Process Builder or Visual Workflow, or code-driven approaches.

Custom buttons that define the content source as a URL or Visualforce page work as you'd expect.

Visualforce and Lightning Components

Yes, Lightning Experience is a major change from Salesforce Classic, but that doesn't mean your Visualforce pages stop working. This release includes support for Visualforce in Lightning Experience. Your existing Visualforce pages work in Lightning Experience, many without needing any revisions. Because things have moved around in the new interface, you'll want to complete some chores to make sure your Visualforce pages work the way you expect. And at this point, a few Visualforce features don't work in Lightning Experience.

Here are a few basic details to consider.

- If your Visualforce pages use JavaScript, there are things you need to check. Visualforce doesn't "own" the whole page when shown in Lightning Experience, and because of that, your JavaScript code needs to play by some new rules.
- If your Visualforce pages use the built-in standard components, their look-and-feel matches Salesforce Classic, whether users access them in the new or old interface. Some work is needed if you want your pages to match the Lightning Experience styling.

  To help with this effort, we're publishing the Salesforce Lightning Design System (SLDS), a collection of design patterns, components, and guidelines for creating interfaces that fit in with Lightning Experience. The SLDS is available at www.lightningdesignsystem.com.

For the complete skinny on what works and doesn't work, see the "Visualforce & Lightning Experience" module in the Developer Trail - Lightning Experience Trailhead trail.

What about new UI customization? The Lightning Component framework is our new UI framework for developing dynamic web apps for both desktop and mobile devices. You can use it or Visualforce in your new projects. To learn more about UI development, see "User Interface Development Considerations" in the Lightning Experience Development Trailhead module. To learn more about Lightning Components, see the "Lightning Components" module in the Developer Trail - Lightning Experience Trailhead trail.

Force.com Canvas

Force.com Canvas allows you to easily integrate third-party applications in Salesforce. Canvas functionality in Lightning Experience is the same as in Salesforce Classic. You can still embed Canvas apps in Visualforce pages and everywhere else they're supported, with the added bonus that you can expose Canvas apps in Lightning Components.

Salesforce APIs and Apex

Most of the programmatic tools and processes you're used to are largely unaffected by Lightning Experience. We've kept our promise that our new releases won't break your dependencies on Salesforce APIs. Tools like Workbench haven't changed. Your development environment is the same as ever.

While your Apex classes and API calls work fine, some features aren't yet supported in Lightning Experience. If a user is in the new interface and executes some Apex code that interacts with an unsupported feature, the user can't complete the task. To address this scenario, we've added capabilities to determine a user's interface preference from both the API and Apex. You can use this functionality to add logic to your existing code so that your users don't encounter errors. See "Understanding Changes to Other Development Tools" in the Lightning Experience Development Trailhead module for full details.

AppExchange Apps

Many apps from the AppExchange feature customizations, including custom objects, custom buttons, Visualforce pages, and more. Salesforce partners are testing their apps in Lightning Experience and applying for *Lightning Ready* certification. Apps that are Lightning Ready work in Lightning Experience and offer a more consistent experience with other Lightning Pages. If an app is supported in Lightning Experience, a Lightning Ready sash appears on its AppExchange listing. If an app isn't supported in Lightning Experience, use it in Salesforce Classic instead.

Note: Your org can use apps without Lightning Ready certification in Lightning Experience, but some features might not be available or work as expected. These apps can 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.

Preview Your Org in Lightning Experience

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view the Lightning Experience Migration Assistant:
- "View Setup and Configuration"

To edit the Lightning Experience Migration Assistant:
- "Customize Application"

This is probably the point where you're thinking: "Yeah, yeah, yeah, but I want to see this thing." But you're not ready to switch your users over yet, so quandary, right? Nope! Lightning Experience Migration Assistant to the rescue. The Migration Assistant's Preview feature lets you explore your production org in Lightning Experience, so you can see exactly how your real data and your current customizations work in the new interface. Without disrupting anyone.

The Preview feature isn't a locked-down, read-only tour. You can change data, settings, permissions—you name it. But remember that you're working with your live org. If you do make changes, they're for real and visible to your users back in Salesforce Classic.

To get started, from Setup, enter *`Lightning`* in the `Quick Find` box, then select **Lightning Experience**. Click **Preview** to dive in.

See If Your Org Is Ready for Lightning with the Lightning Experience Readiness Check

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To run the Lightning Experience Readiness Check

- "Customize Application"

Curious about whether Lightning Experience is right for your company? The Lightning Experience Readiness Check evaluates your org and generates a report showing whether the features you use in your org are supported in Lightning.

The Lightning Experience Readiness Check inspects the following features in your org:

- Tabs and Objects:
  - Contracts
  - Documents
  - Forecasts
  - Orders
  - Quotes
  - Territory Management
- Custom Buttons and Links:
  - JavaScript
  - Salesforce.com URLs
- Home page and sidebar components
- Related lists:
  - Accounts hierarchy
  - Campaign hierarchy
  - Campaign influence
  - Contracts hierarchy
  - Quotes
- Cases
- Email Templates
- Sharing Buttons
- Lookup filters
- Third-party Computer-Telephony Integration (CTI)
- Hard-coded URLs and My Domains
- Visualforce overrides

Note: The Lightning Experience Readiness Check evaluates some, but not all, Sales Cloud features. It doesn't evaluate information about reports, dashboards, communities, or other clouds.

The Lightning Experience Readiness Check supports orgs with certain IP address restrictions. The following IP addresses are whitelisted on the user profile while the readiness check is running:

- 52.2.2.209
- 52.203.195.34
- 52.200.207.131
- 52.72.119.132

The Lightning Experience Readiness Check supports sandboxes.

The Lightning Experience Readiness Check and report are available only in English.

1. From Setup, enter "Lightning Experience" in the Quick Find box, then select **Lightning Experience Readiness Check**.
2. After you run the readiness check, Salesforce generates a pdf report and emails it to you.

   Review your readiness report for information about whether to switch to Lightning Experience and any modifications you need.

Transition to Lightning Experience: Let's Do This!

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Great! You've decided you're ready to switch to Lightning Experience. First, we recommend that you develop a strategy to guide your rollout. Then, when the time is right, here's how to enable the new user interface.

Develop Your Lightning Experience Rollout Strategy

One of the best investments you can make in your Lightning Experience rollout is to have a clear plan. A plan helps you do things in the right order, identify key resources, communicate with everyone, and have a clear end date in mind.

Enable Lightning Experience

Turning on Lightning Experience is a very simple task—just flip the switch! But we recommend that you set up a few other features first so your users get the full power of the new interface when you enable Lightning Experience. Then you set up the appropriate users to access Lightning Experience. You can choose to start slow and roll out the new interface to a small pilot group, or jump in and turn it on for everyone in your organization.

Develop Your Lightning Experience Rollout Strategy

One of the best investments you can make in your Lightning Experience rollout is to have a clear plan. A plan helps you do things in the right order, identify key resources, communicate with everyone, and have a clear end date in mind.

Depending on the size of your organization, you could be working with a Change Management department or have a project manager assigned to the rollout. Or perhaps you're the one charged with organizing and executing the rollout from start to finish. However the work gets divvied up, use the Lightning Experience Rollout module in *Admin Trail - Migrating to Lightning Experience* from Trailhead to help with this process.

Your rollout will likely fall into these phases.

Learn	• Learn about Lightning Experience • Identify stakeholders and an executive sponsor • Educate your company with presentations and demos • Review Compare Lightning Experience and Salesforce Classic and Lightning Experience Considerations • Conduct a gap analysis to confirm you're getting what you need
Launch	• Identify users for a pilot of Lightning Experience • Identify and activate super users • Create the project schedule • Define measures for success

	• Create and execute your marketing and training strategies • Customize and test, ideally in a sandbox environment • Go live!
Iterate	• Evaluate how things are working to see if you're hitting your success metrics • Survey your users for satisfaction and pain points • Use reports and dashboards to track metrics and feedback • Deliver an executive summary

To jump-start your planning, download the Lightning Experience Customer Enablement Pack that's part of the Lightning Experience Rollout module. The Enablement Pack is chock-full of valuable resources, like a presentation deck, a risk severity matrix, a project schedule template, a sample email drip campaign, and a rollout checklist to keep you focused and on track.

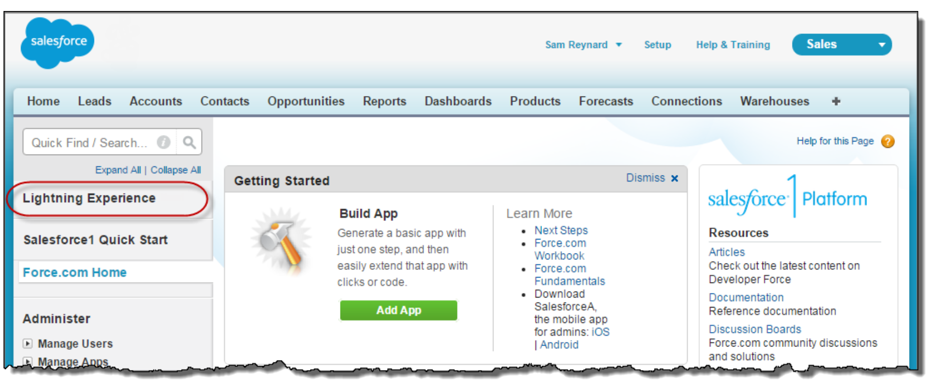
Enable Lightning Experience

Turning on Lightning Experience is a very simple task—just flip the switch! But we recommend that you set up a few other features first so your users get the full power of the new interface when you enable Lightning Experience. Then you set up the appropriate users to access Lightning Experience. You can choose to start slow and roll out the new interface to a small pilot group, or jump in and turn it on for everyone in your organization.

Use the Lightning Experience Migration Assistant as your control center for tackling these steps. From Setup in Salesforce Classic, click **Lightning Experience**.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Recommended Features for Lightning Experience

If you haven't already, consider enabling and setting up several supporting features before turning on Lightning Experience. These features ensure that the new user interface is fully optimized to help your sales reps sell faster and smarter.

Set Up Users for Lightning Experience

Next up, make sure that the desired users get access to Lightning Experience. By default, the "Lightning Experience User" permission is automatically enabled for all users with a standard Salesforce profile. But you can fine-tune access to Lightning Experience with custom profiles or permission sets. Meaning you can do a limited rollout to a pilot group or enable a specific team of users who can benefit from the new interface. Or go for it and set your entire organization loose. The power is yours.

Turn on Lightning Experience for Your Org

You've knocked off the "Learn" and "Launch" items in your rollout plan. You've set up the Salesforce features that optimize the new user interface. You've enabled the right users and designated who gets the new interface right away and who stays in the classic interface. You're ready to go live! Fortunately, it's easy to turn on Lightning Experience using the Migration Assistant.

SEE ALSO:

Supported Editions and User Licenses for Lightning Experience

Recommended Features for Lightning Experience

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

If you haven't already, consider enabling and setting up several supporting features before turning on Lightning Experience. These features ensure that the new user interface is fully optimized to help your sales reps sell faster and smarter.

Related Files

Leverage the rich features and flexibility of Salesforce Files from standard Salesforce objects and your custom objects. Add the new Files related list to page layouts so that users can upload files to records, see files associated with records, and quickly page through files in the modern, visually rich preview player.

Enhanced Notes

Help your users stay organized with our enhanced note-taking tool. It's a breeze to create rich-text notes and quickly relate them to specific records. When you turn on Notes, remember to add the new Notes related list to page layouts so that your users can create and read notes directly from their records.

Sales Path

Help your sales reps adopt your company's sales processes and close more deals. Customize your lead statuses and opportunity stages, and even the order you want them to appear in the sales paths on lead and opportunity workspaces. Then with help from sales management, add guidance for success in each status and stage.

Duplicate Management

Create duplicate rules to alert users if they're about to create a duplicate record. Craft your duplicate rules to control whether and when users can create duplicate records in Salesforce.

Lead Conversion

Keep the sales process moving by letting your sales reps convert qualified leads to contacts. At the time of conversion, sales reps select an account for the newly created contact, or create an account if it's not yet in Salesforce. Reps can also create an opportunity on the spot. Add the Convert button to the Lead page layout.

News

Give your reps instant access to relevant, timely news about their accounts, contacts, leads, and opportunities. This feature is available only in English, so if your org uses a different primary language, you might not want this option.

Social Accounts, Contacts, and Leads

Keep the team up to date by letting reps link their accounts, contacts, and leads to matching Twitter profiles. Users can see Twitter user profiles and people in common in Salesforce and quickly access tweets.

Shared Activities

Represent activity relationships more accurately by letting your sales reps relate multiple contacts to individual events and tasks. Shared Activities is forever. After the feature's enabled, it can't be disabled.

My Domain

Create a custom domain with the Salesforce My Domain feature. A custom domain helps you manage login and authentication. You must set up a custom domain to use Lightning components in Lightning component tabs, Lightning Pages, the Lightning App Builder, and standalone apps. To set up a custom domain, see My Domain in the Salesforce Help.

Set Up Users for Lightning Experience

EDITIONS

Profiles and Permission Sets available in: both Salesforce Classic and Lightning Experience

Profiles and Permission Sets available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Next up, make sure that the desired users get access to Lightning Experience. By default, the "Lightning Experience User" permission is automatically enabled for all users with a standard Salesforce profile. But you can fine-tune access to Lightning Experience with custom profiles or permission sets. Meaning you can do a limited rollout to a pilot group or enable a specific team of users who can benefit from the new interface. Or go for it and set your entire organization loose. The power is yours.

Note: Okay, if you use Group Edition, that's overstating things. You can't remove the "Lightning Experience User" permission from your org's standard profiles, and custom profiles aren't available. So it's "all or nothing" if you want to turn on Lightning Experience in Group Edition—all your users will be enabled to use the new interface. But you can control who is immediately switched into the new interface and who remains in the classic interface until they're ready to switch themselves.

Decide Who Can Use Lightning Experience

First things first, do you have users with standard profiles who shouldn't get access to Lightning Experience yet? Move these users to custom profiles that don't include the "Lightning Experience User" permission.

For users with custom profiles, decide who gets Lightning Experience. Custom profiles don't automatically include the "Lightning Experience User" permission so it's up to you. Consider these options.

- Want to test Lightning Experience with a small group of custom profile users but you don't want to turn it on for everyone assigned to these profiles? Create a permission set that includes the "Lightning Experience User" permission. Then apply the permission set to each pilot user. When you turn on Lightning Experience, only pilot users see the new interface.

  Are you new to permission sets? Check out this walkthrough! Walk Through It: Create, Edit, and Assign a Permission Set

- Interested in rolling out Lightning Experience to specific custom profiles? Or ready to enable all your custom profile users? Adding the "Lightning Experience User" permission to profiles is the fastest way to mass-enable the new user interface.

  If you're dealing with many profiles, you can tackle them at the same time with the Data Loader. But remember, with great power comes great responsibility. Take care you don't inadvertently enable or disable other features.

If you're going to limit Lightning Experience to a subset of your users, we recommend that you keep all members of a functional team on the same experience. If you have team members who often share links and work closely together, include them all in your pilot. See Gotchas If Users Switch Between Lightning Experience and Salesforce Classic for more details.

Decide Who Immediately Switches to Lightning Experience

The last step is to decide which of your users should immediately switch to the new interface when you enable Lightning Experience and who should stay in Salesforce Classic. You can choose what's right for each user. If your team isn't fully trained on Lightning Experience yet or it's not a good time to introduce a major change, you can opt to leave everyone in Salesforce Classic when Lightning Experience is turned on.

Tip: Remember, everyone who's enabled for Lightning Experience automatically gets the Switcher. Meaning users who remain in Salesforce Classic can switch themselves to Lightning Experience whenever they're ready. And of course, users assigned to the new interface can switch back to Salesforce Classic as needed.

To assign the right interfaces for your users, use the Lightning Experience Migration Assistant. From Setup in Salesforce Classic, click **Lightning Experience**. In the "Decide Who Can Use Lightning Experience" section, find the "Switch Users to Lightning Experience" item and click **Select Users**.

Note: Any users you add to Salesforce after Lightning Experience is enabled are automatically assigned to the new user interface.

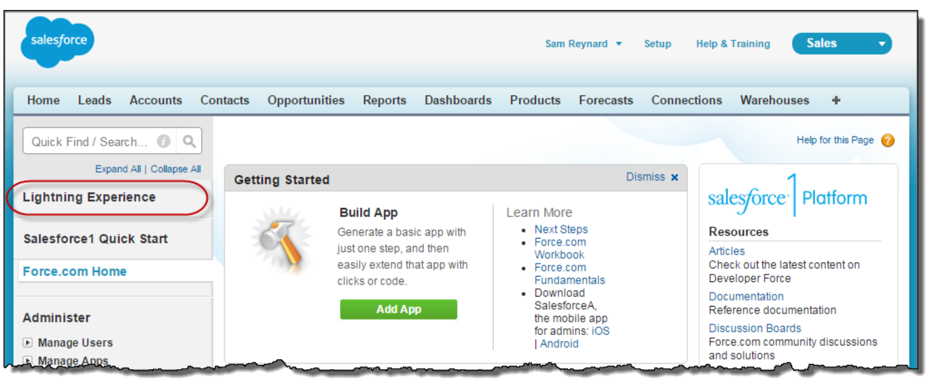
SEE ALSO:

Saying Hello to Lightning Experience Doesn't Mean Saying Goodbye to Salesforce Classic

Turn on Lightning Experience for Your Org

You've knocked off the "Learn" and "Launch" items in your rollout plan. You've set up the Salesforce features that optimize the new user interface. You've enabled the right users and designated who gets the new interface right away and who stays in the classic interface. You're ready to go live! Fortunately, it's easy to turn on Lightning Experience using the Migration Assistant.

From Setup in Salesforce Classic, click **Lightning Experience**.



EDITIONS

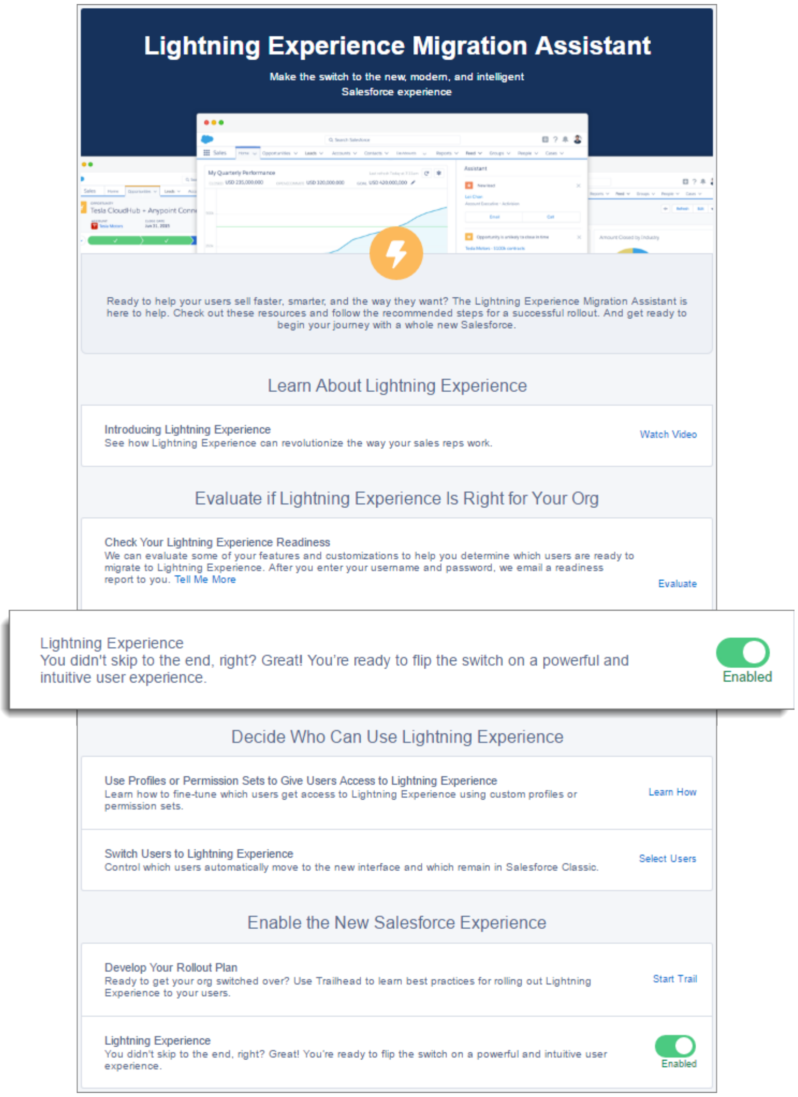
Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view the Lightning Experience Migration Assistant:
- "View Setup and Configuration"

To edit the Lightning Experience Migration Assistant:
- "Customize Application"

On the Lightning Experience Migration Assistant page, click the **Lightning Experience** button to set it to **Enable**.



That's it! The users you've enabled and set up to immediately switch to the new interface automatically start enjoying Lightning Experience when their current session refreshes or when they log in. The users you've enabled but opted to leave in Salesforce Classic now have access to the Switcher and can switch to Lightning Experience whenever they want.

Disable Lightning Experience for Your Org

If this release of Lightning Experience isn't a good fit for your org, it's easy to turn off the new user interface. When you disable Lightning Experience, all users immediately switch to Salesforce Classic.

From Setup, enter *Lightning Experience* in the Quick Find box.

From the Lightning Experience Migration Assistant, click the **Lightning Experience** button to set it to **Disabled**.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view the Lightning Experience Migration Assistant:
- "View Setup and Configuration"

To edit the Lightning Experience Migration Assistant:
- "Customize Application"

Find Your Way Around Lightning Experience

Feeling a little discombobulated by all the Lightning Experience newness? Perfectly understandable. Diving into a redesigned app can be disorienting—especially when you're able to work in the original interface with your eyes closed. To hone your Lightning Experience chops, let's look at where some of the most common Salesforce features landed in the new interface.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Find Profile and Personal Settings in Lightning Experience

In Salesforce Classic, your profile and personal settings are located in the menu with your name. It's not too different in Lightning Experience. Find links to these options by clicking your profile picture. Want to switch between Lightning Experience and Salesforce Classic? You can find links to do so from here, too.

Find Objects and Apps in Lightning Experience

In Salesforce Classic, you use tabs (1) to access objects, like accounts and leads. Tabs also serve up other features, such as your Home page or Chatter. Navigation in Lightning Experience (2) is similar to navigation in Salesforce Classic, but with some improvements. In Lightning Experience you can complete actions and access recent records and lists directly from the navigation bar, and switch between apps that have custom colors and branding.

Find List Views in Lightning Experience

Lightning Experience improves the Salesforce Classic list view experience with a more intuitive layout, convenient navigation, and seamless list creation and editing.

Find Your Way Around Records in Lightning Experience

In Salesforce Classic, record details, related lists, and the record feed display on the same page. This layout can lead to a lot of scrolling, especially in records with a lot of data. In Lightning Experience, find record details, related information, and the record feed in dedicated tabs that are easy to switch between.

Find Your Way Around Lightning Experience Setup

Lightning Experience Setup makes it faster and easier than ever to customize Salesforce to meet your company's needs.

Find Actions and Buttons in Lightning Experience

While Salesforce Classic displays actions in the Chatter publisher, and buttons on a record's details page, Lightning Experience blurs the distinction between these elements. The new interface intermingles actions and buttons, locating them in different areas, based on function.

Find Related Lists in Lightning Experience

Records in Salesforce include details and links to other related records. Salesforce Classic displays related records in lists that appear near the bottom of the page. In Lightning Experience, related information appears in related list cards. For leads and opportunities—the objects that include a workspace—access related list cards from the Related tab. For reference objects like accounts and contacts, and on groups and people, related list cards display on the right side of the page.

Find Chatter Features in Lightning Experience

With Lightning Experience, you can connect with people and groups and share business information securely and in real time, just like you're used to in Salesforce Classic. The way you access Chatter feeds, groups, and profiles is a bit different in the new interface. But with this quick overview, you'll feel right at home.

Find Help in Lightning Experience

In Lightning Experience, each page has a contextual help menu with links to resources—help topics, walkthroughs, videos, developer guides, and PDFs—related to the specific tasks on that page.

Find Profile and Personal Settings in Lightning Experience

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

In Salesforce Classic, your profile and personal settings are located in the menu with your name. It's not too different in Lightning Experience. Find links to these options by clicking your profile picture. Want to switch between Lightning Experience and Salesforce Classic? You can find links to do so from here, too.

In Salesforce Classic, click your username to find links to your profile and personal settings (**1**). To get to your profile in Lightning Experience, click your profile picture (**3**) to open the Switcher (**4**). Then click your profile picture again to access your profile (**5**). Click **Settings** (**6**) to update your personal information.

To switch to Lightning Experience from Salesforce Classic, click your name in the Salesforce Classic header, then click **Switch to Lightning Experience** (**2**). Want to return to Salesforce Classic? Click **Switch to Salesforce Classic** (**7**). We remember your choice and set it as the default preference.

By the way, before you add a photo, you look like this:  . That's probably not a great likeness, so click it (**5**) to upload your own profile picture.

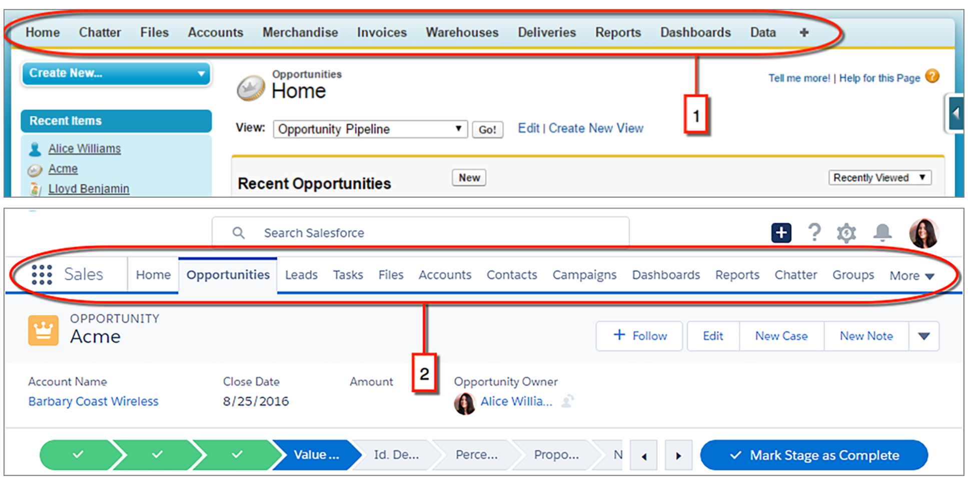
So what's Add Username (**8**)? And why are other usernames listed here (**9**)? With Lightning Experience, users can switch between usernames. If you have multiple usernames on the same or different orgs, you can choose a username from the list. For example, Salesforce admins can log in as another user when setting up profiles and permission sets. Don't worry if you don't see this information. Most users have a single username. Or your admin disabled the feature for your org.

Find Objects and Apps in Lightning Experience

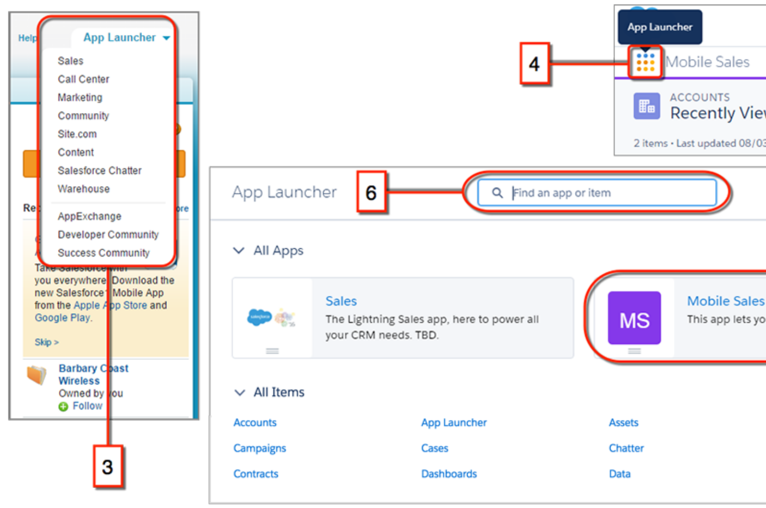
In Salesforce Classic, you use tabs (1) to access objects, like accounts and leads. Tabs also serve up other features, such as your Home page or Chatter. Navigation in Lightning Experience (2) is similar to navigation in Salesforce Classic, but with some improvements. In Lightning Experience you can complete actions and access recent records and lists directly from the navigation bar, and switch between apps that have custom colors and branding.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Use the App Launcher to open apps in both Salesforce Classic (3) and Lightning Experience. In Lightning Experience, the App Launcher is always accessible in the navigation bar (4) and shows your custom apps with custom logos, colors, and descriptions (5). If you're looking for an item that's not in your current app, you can still find it in the App Launcher in Lightning Experience. You can also search the App Launcher to more quickly find the item or app you're looking for (6).



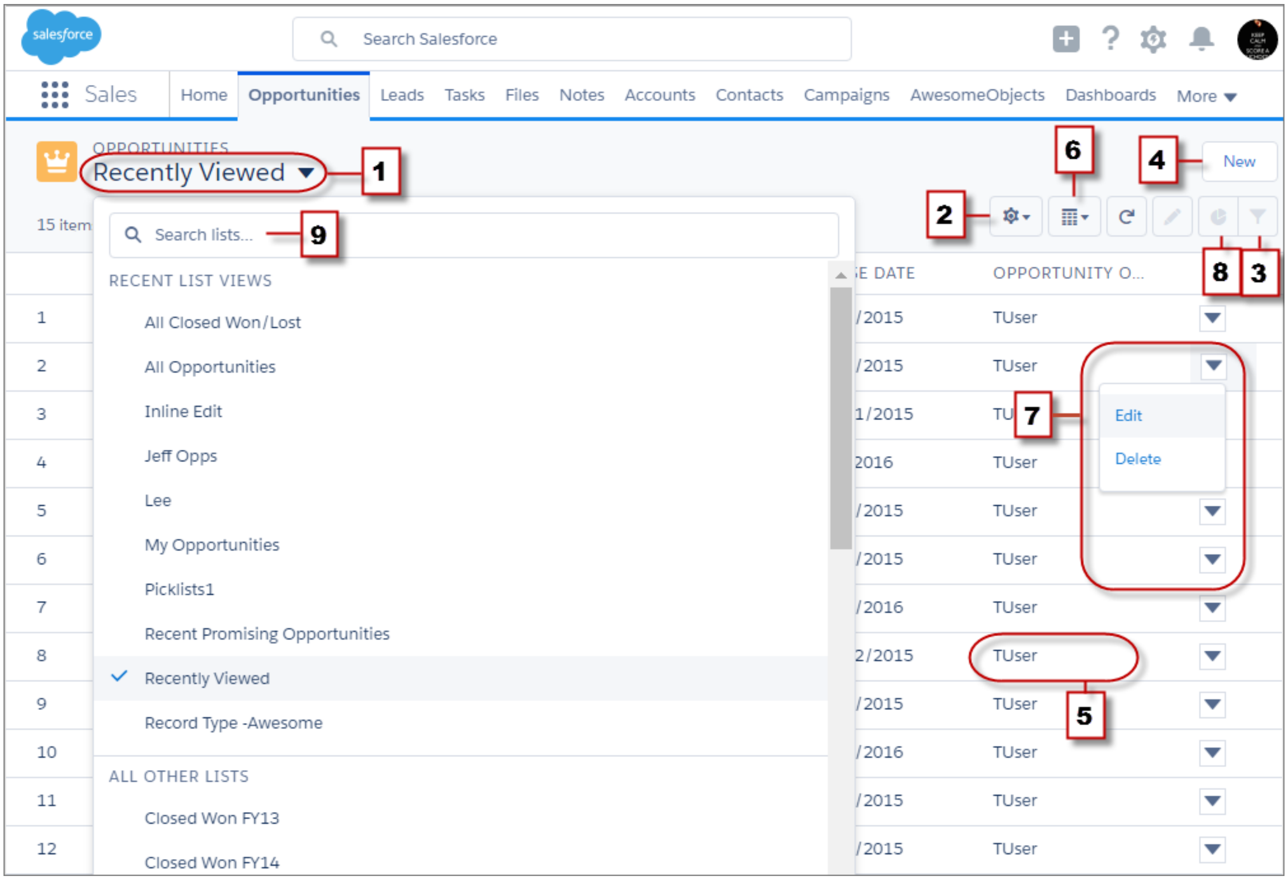
Find List Views in Lightning Experience

Lightning Experience improves the Salesforce Classic list view experience with a more intuitive layout, convenient navigation, and seamless list creation and editing.

Note: In list views you see only the data that you have access to. You see records that you own or have read or write access to, and records shared with you. List views also include records owned by or shared with users in roles below you in the role hierarchy. You can see only the fields that are visible according to your page layout and field-level security settings.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



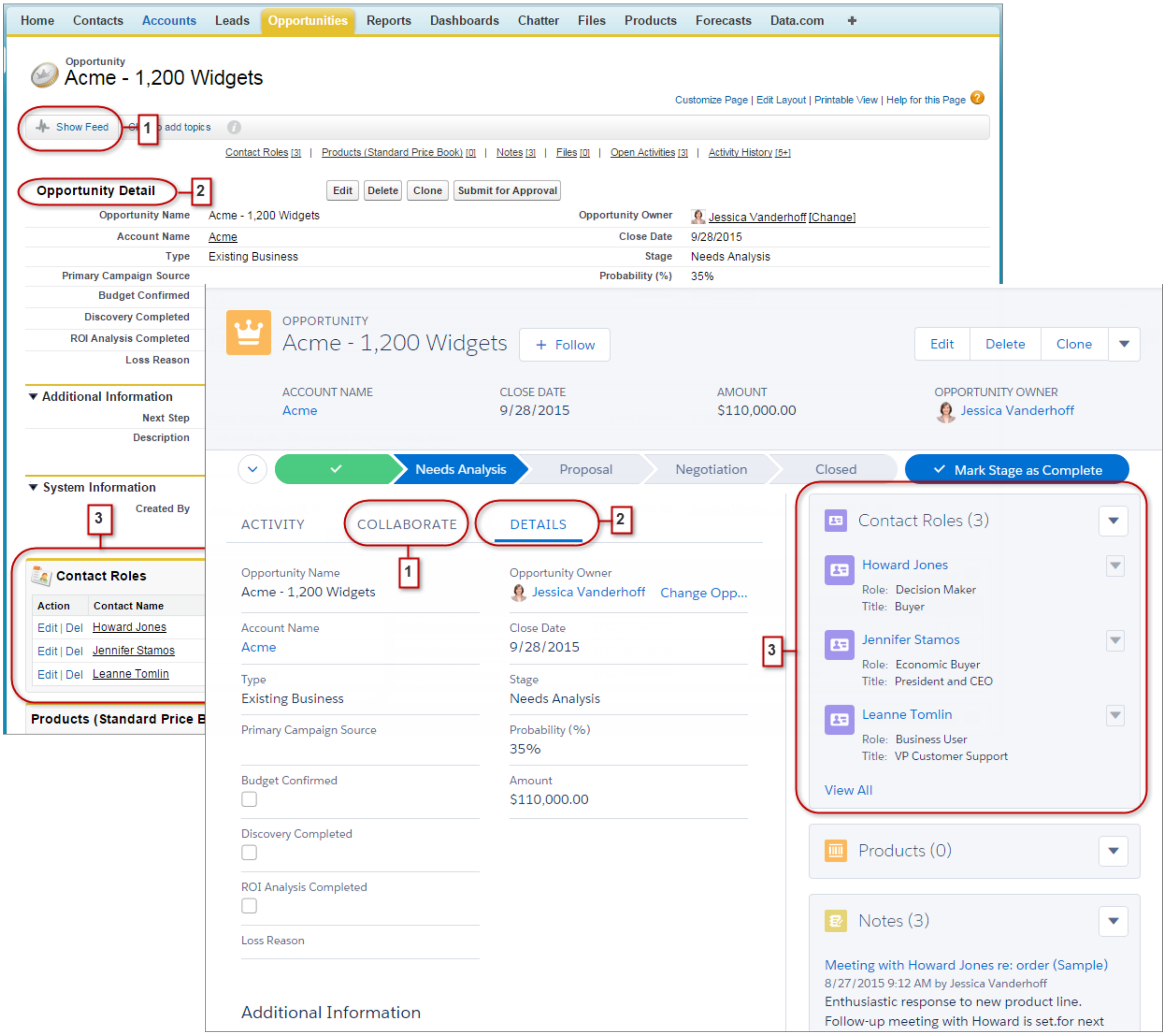
- Select a list view from the drop-down menu (1).
- Create, edit, or delete list views from List View Controls (2).
- Quickly modify a view's filters (3) and refine which records are displayed.
- Create records directly from a list view (4).
- Edit fields directly from a list view (5).
- *(Opportunities only)* Toggle between the standard list view grid and the Kanban board (6), a visual way to monitor the pipeline.
- Edit or delete specific records (7).
- Visualize list view data with charts (8): vertical bar, horizontal bar, or donut.
- Find a specific list view faster by searching for it (9).

Find Your Way Around Records in Lightning Experience

In Salesforce Classic, record details, related lists, and the record feed display on the same page. This layout can lead to a lot of scrolling, especially in records with a lot of data. In Lightning Experience, find record details, related information, and the record feed in dedicated tabs that are easy to switch between.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



- In Salesforce Classic, Show Feed (1) controls whether a record's Chatter feed is visible. In Lightning Experience, the record's feed and the feed composer are always available on the Collaborate tab (1).
- See all record details on the Details tab (2).
- In Salesforce Classic, records include related lists (3), while Lightning Experience displays related information in related list cards (3). See Find Related Lists in Lightning Experience for a deeper examination of how related information is handled in the new and classic interfaces.

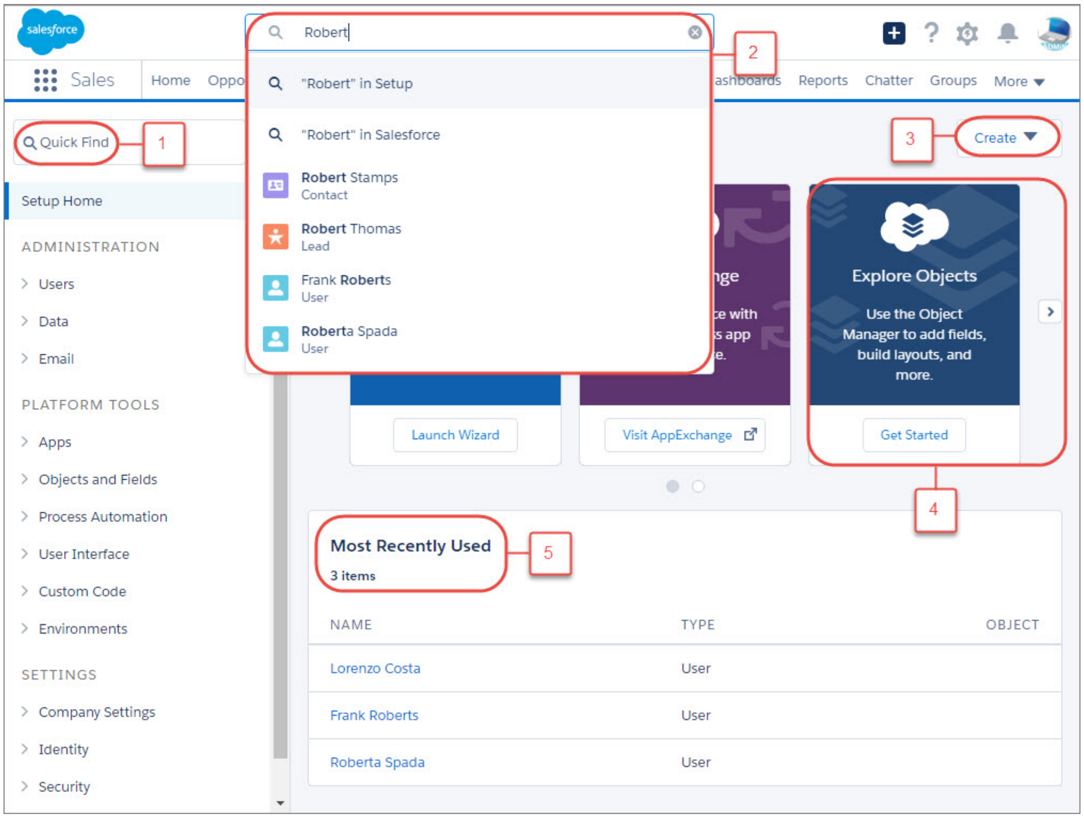
SEE ALSO:

Find Actions and Buttons in Lightning Experience

Find Your Way Around Lightning Experience Setup

Lightning Experience Setup makes it faster and easier than ever to customize Salesforce to meet your company's needs.

As a Salesforce admin, you spend plenty of time using Setup. It's where you'll reset passwords, create users and profiles, create email templates and custom fields, customize layouts, and more. As you're getting familiar with Setup, don't worry about memorizing click paths. Instead, focus on the shortcuts. Here are some useful navigation tools to remember.



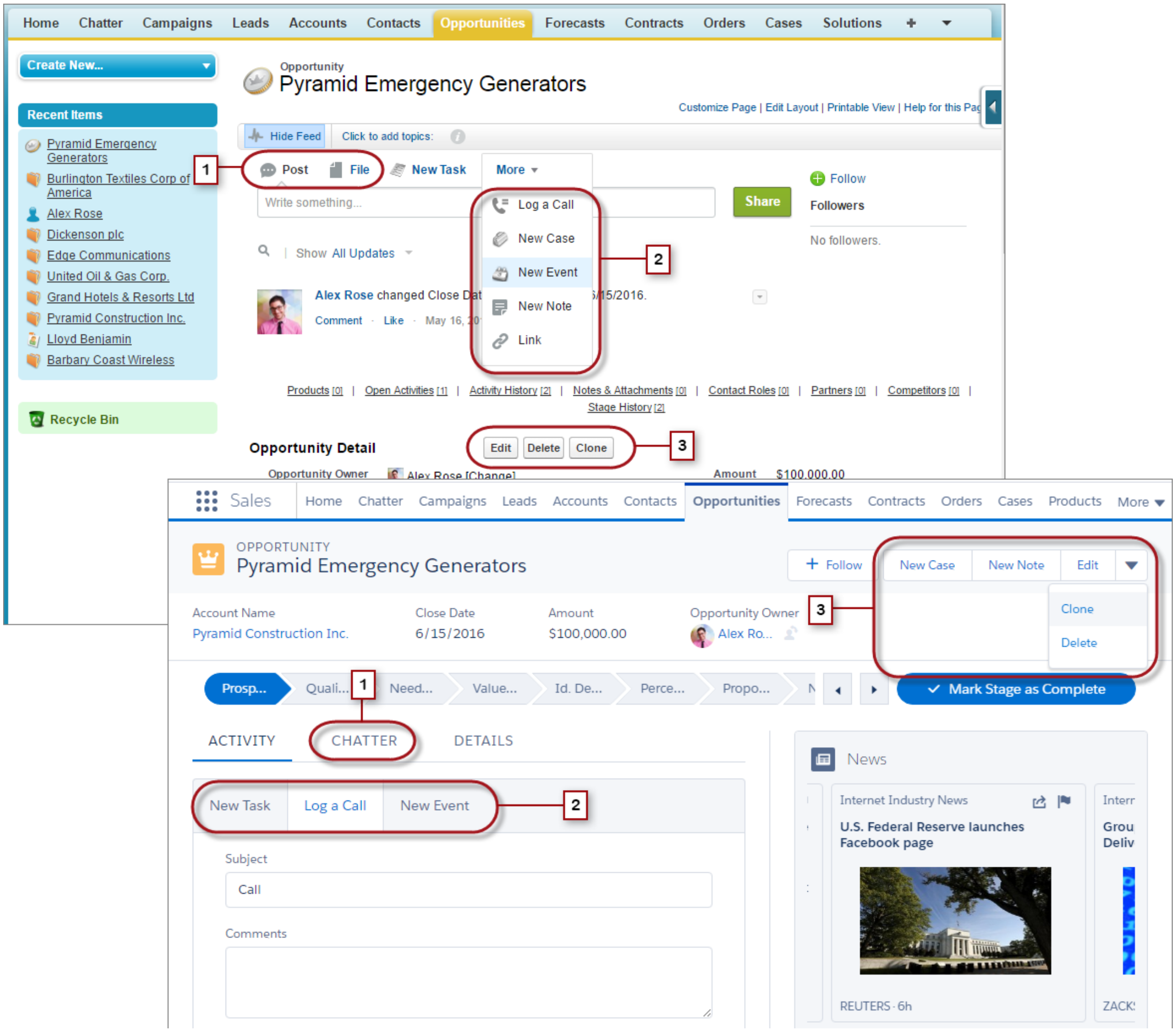
- **Quick Find** (**1**) is your tool for getting where you need to go quickly. Enter a search term in the Quick Find box to filter the list of pages by what you've entered. Find what you're looking for faster than you would by browsing through the Setup pages.
- To search for fields, objects, users, and more based on the name, use global search (**2**). While within Setup, enter a record name, and select the **in Setup** option in instant results or press Enter. The search results page lists records that match your search term.
- The **Create** menu (**3**) appears on every page in Setup. It provides an easy way to create items that you tend to create most often, such as create users, custom objects, custom tabs, and email templates.
- The carousel (**4**) gives you instant access to important Setup tools and information for Salesforce1, SalesforceA, release notes, performance, and more.
- **Most Recently Used** (**5**) shows your most recently used records in Setup. You can get back to what you were working on with a single click.

Find Actions and Buttons in Lightning Experience

While Salesforce Classic displays actions in the Chatter publisher, and buttons on a record's details page, Lightning Experience blurs the distinction between these elements. The new interface intermingles actions and buttons, locating them in different areas, based on function.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



- The Post and Poll standard Chatter actions (1) appear in the composer on the Chatter tab in Lightning Experience. Other standard actions like Thanks and Links, however, aren't available in the new interface.
- The Log a Call, New Task, and New Event actions (2) from an object's page layout appear in the composer on the Activity tab. And if the Send an Email button is included on the object's page layout, the Email action shows up in this composer too. These actions create records that are related to one the user is viewing.

  Or use the Global Actions menu (+) in the header to log a call or create events, notes, and tasks that aren't related to the current record.

- Standard and supported custom buttons (3) on the page layout—including the Edit button—appear in the action menu. And any other global and object-specific actions, including Visualforce and Force.com Canvas actions, appear in the menu as well.
- As in Salesforce Classic, custom links are included with the record's details. Click the Details tab to find them.

SEE ALSO:

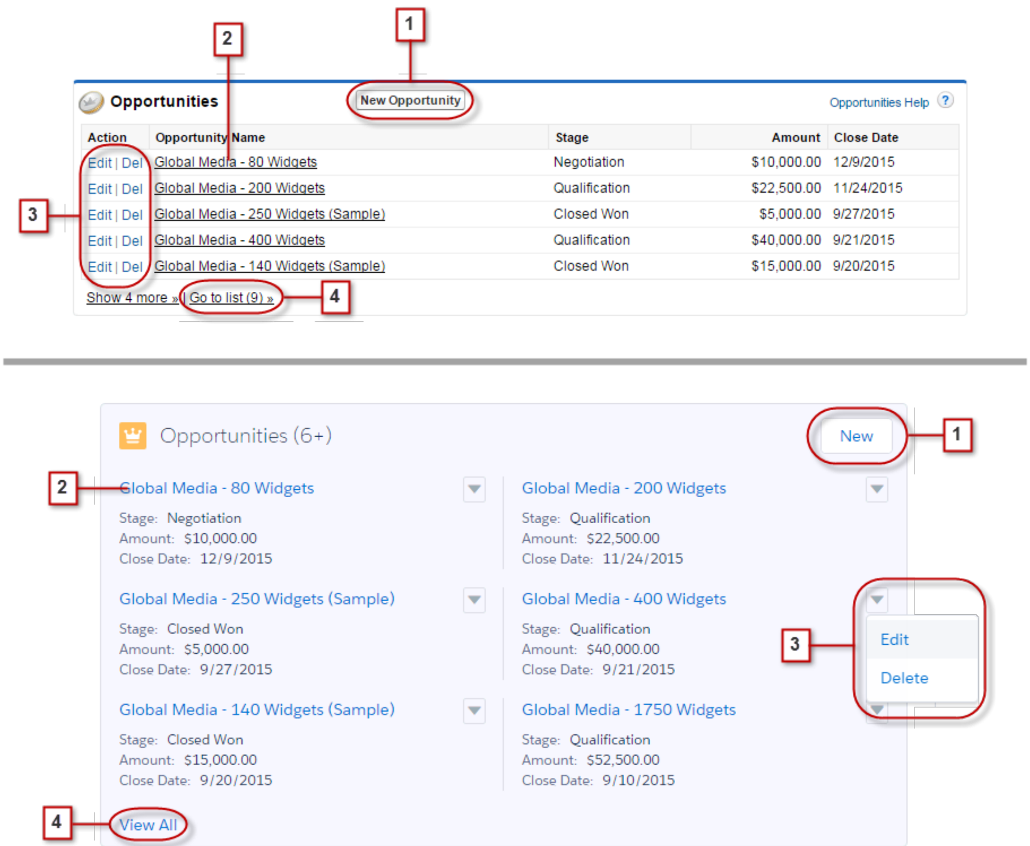
Navigation and Actions: What's Not in Lightning Experience

Find Related Lists in Lightning Experience

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Records in Salesforce include details and links to other related records. Salesforce Classic displays related records in lists that appear near the bottom of the page. In Lightning Experience, related information appears in related list cards. For leads and opportunities—the objects that include a workspace—access related list cards from the Related tab. For reference objects like accounts and contacts, and on groups and people, related list cards display on the right side of the page.



For the first eight related list cards on a record:

- Related list buttons (1) are located in the upper-right corner of each related list card. If there are multiple buttons, use the pull-down menu to access them.
- Each item in a related list card includes a link (2) that opens the related record.
- Record-specific actions (3) are located in the pull-down menu next to each related record.
- When related list cards are on the right side of the page, each card displays up to three records. On reference objects, related list cards display up to six records. In both cases, drill down (4) to see the full list of related records.

If there are more than eight related lists on a record, additional related list cards display the object's name only. Click the name in the related list card to open the full related list, which includes the related list buttons and record-specific actions that aren't included in the card.

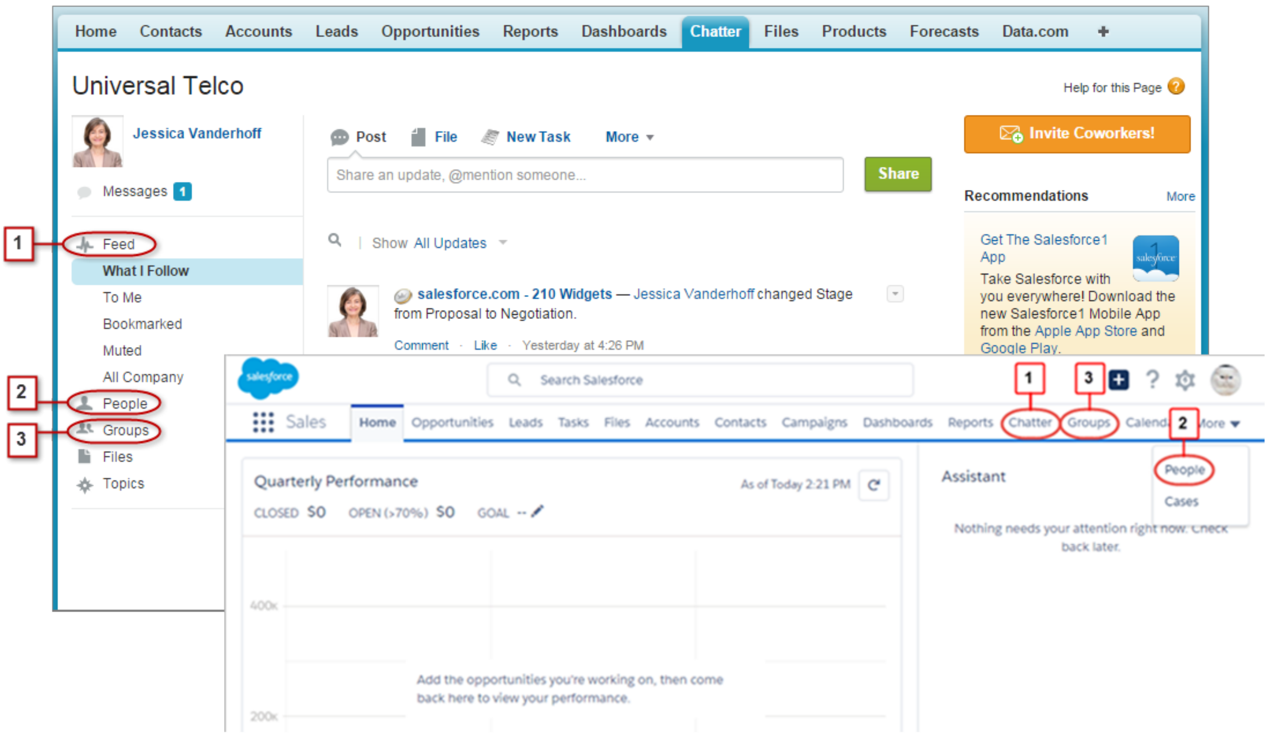
Find Chatter Features in Lightning Experience

With Lightning Experience, you can connect with people and groups and share business information securely and in real time, just like you're used to in Salesforce Classic. The way you access Chatter feeds, groups, and profiles is a bit different in the new interface. But with this quick overview, you'll feel right at home.

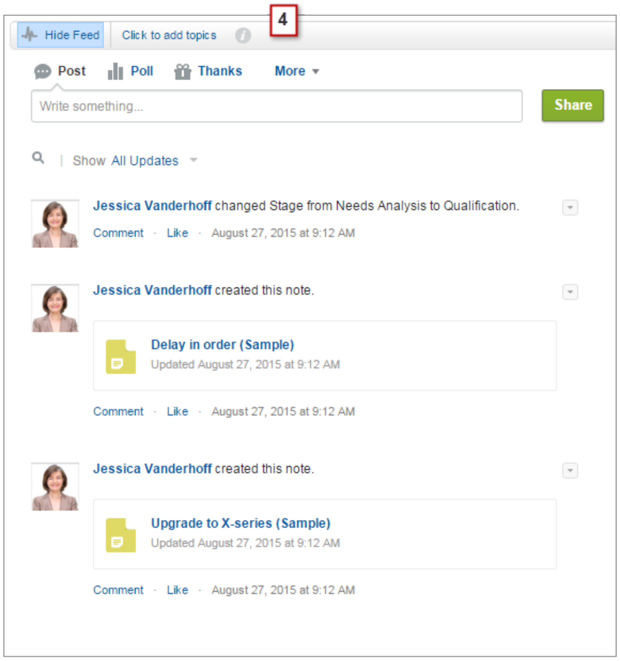
In Salesforce Classic, you typically access Chatter features from the sidebar on the Chatter tab. In Lightning Experience, access the main feed (1), colleagues' profiles (2), and groups (3) directly from tabs at the top of the page.

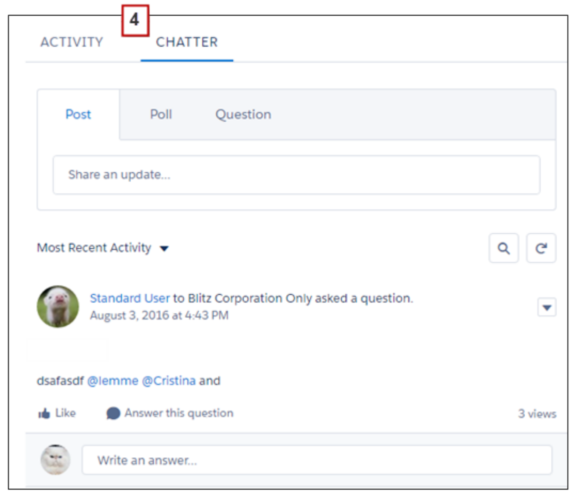
EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



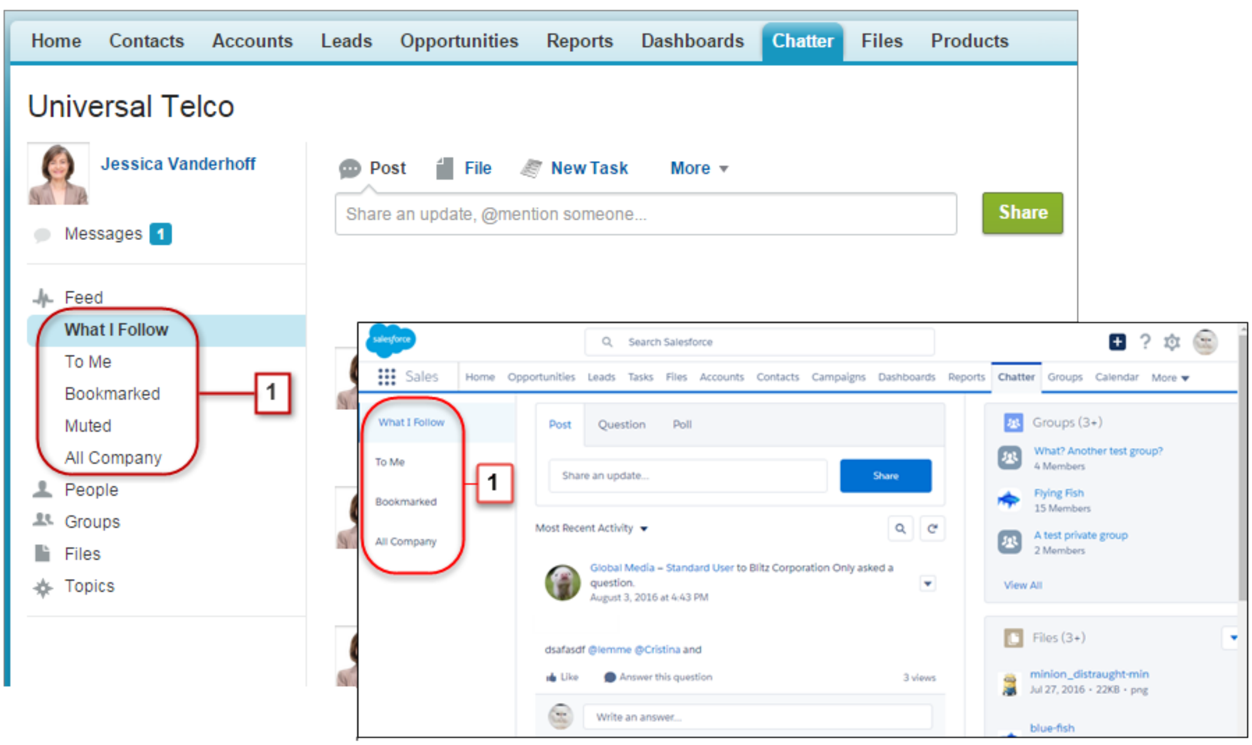
To collaborate on records (4), look for the Chatter tab in Lightning Experience. You can post updates, create polls, ask questions, and share files, just like in Salesforce Classic.





Work with Chatter Feeds

You can change the main Chatter feed to show a particular subset of posts (1). Like Salesforce Classic, in Lightning Experience, use the tabs on the left side of the Chatter tab. The What I Follow feed continues to be the default feed.



Feeds in Lightning Experience include many of the options that are available in Salesforce Classic.

- The Post, Poll, and Question actions are available in the publisher on the Chatter tab. Click the publisher's text box to access buttons for uploading a file or mentioning people. Other standard Chatter actions that appear in the publisher in Salesforce Classic, including Thanks and Links, aren't available in Lightning Experience.
- Sort the feed by most recent posts or comments. Options to filter a feed aren't available in Lightning Experience.
- Refresh the feed to see up-to-date information.
- Locate information in a specific feed with feed search.
- Acting on a post is the same in both interfaces. But topics aren't available in Lightning Experience.

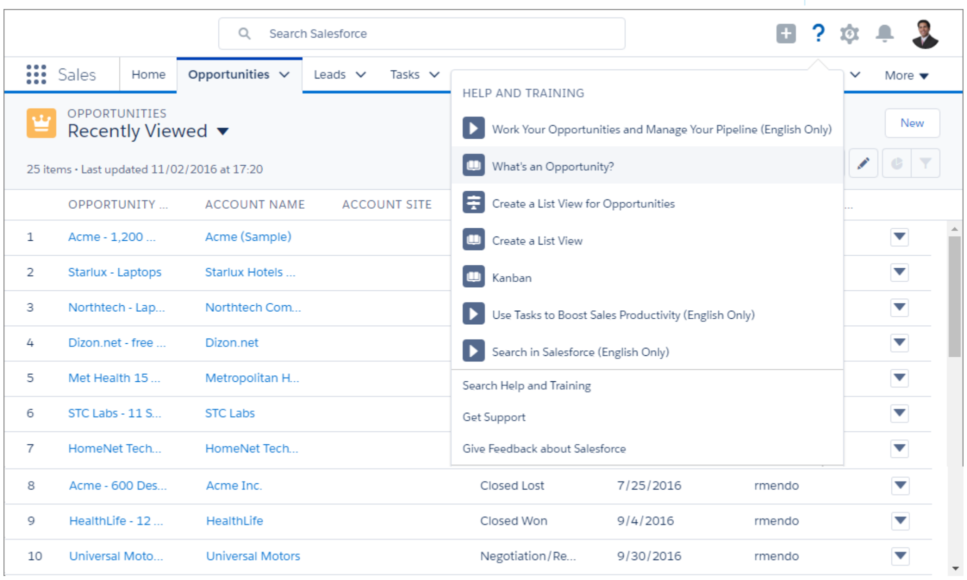
Find Help in Lightning Experience

In Lightning Experience, each page has a contextual help menu with links to resources—help topics, walkthroughs, videos, developer guides, and PDFs—related to the specific tasks on that page.

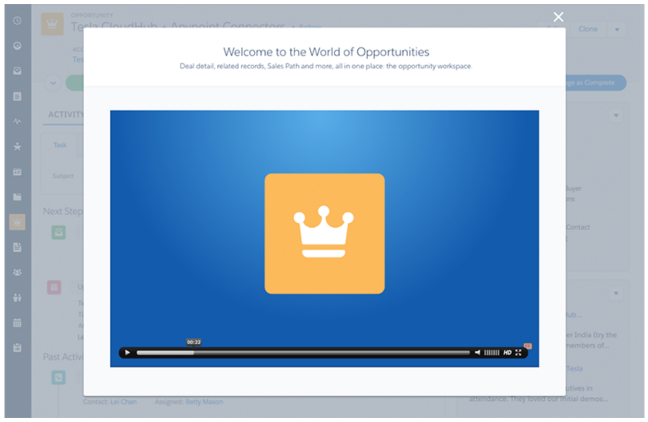
On object pages, the menu replaces the "Help for this Page" link that you're used to seeing in Salesforce Classic. The "Help for this Page" link still appears on many Setup pages, but we encourage you to use the help menu instead for a broader selection of useful information.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



When you click a video link ( ), a video player appears, allowing you to watch without leaving Salesforce.



Walkthrough links ( ) take you to the first step of the walkthrough in your organization. Help, developer guide, and PDF links open in a new browser tab.

You can't customize the items in the help menu. If you've created custom help links, those links still work from the "Help for this Page" links in the framed Salesforce Classic pages. However, your custom help links don't appear in the new Help menu.

Lightning Experience Considerations

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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.

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. This means there can be snags with bookmarks and sharing 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. And remember 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 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.

SEE ALSO:

Lightning Experience Roadmap

Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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. This means there can be snags with bookmarks and sharing 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 you enable users for Lightning Experience, you can set it up so some or all of them immediately get the new interface as their default, *preferred* experience. And for the Lightning Experience-enabled users you opt to leave in the classic interface, their default experience is Salesforce Classic. Either way, any 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 User" 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. 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 doesn't change 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 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.

SEE ALSO:

Saying Hello to Lightning Experience Doesn't Mean Saying Goodbye to 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. And remember 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.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

SEE ALSO:

Saying Hello to Lightning Experience Doesn't Mean Saying Goodbye to Salesforce Classic

Data Access and Views: What's Not in Lightning Experience

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
- Assets
- Calendar
- Campaigns
- Cases
- Chatter
- Contacts
- Contracts
- Dashboards
- Events
- Files
- Groups
- Home
- Leads
- Notes
- Opportunities
- People
- Person Accounts
- Price Books
- Products
- Quotes
- Reports
- Tasks
- Work Orders
- Custom objects
- External 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 images aren't supported in search results. The field name displays but the field itself is empty.
- Lookup fields in Salesforce Classic show record names regardless of sharing permissions, so it's possible for users to see the name of records that they can't access. In Lightning Experience and the Salesforce1 mobile app, lookup fields respect sharing permissions and only show the name of records that the user can access. The one exception is owner lookup fields, which always display the name of the record's owner, regardless of sharing permissions.

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.

- Lightning Experience includes new Files and Notes related lists, in addition to the classic Notes & Attachments related list. If you're using Salesforce Files or the enhanced Notes feature, include all these related lists on your object page layouts.
  - Files and attachments are two different types of objects, and always have been. Unlike files, attachments are associated only with a particular record and can't be shared further. In Lightning Experience, uploads to the Notes & Attachments related list are files. In Salesforce Classic prior to Spring '16, uploads to this related list were always attachments instead of files. For existing orgs, 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.

    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.
- When the Opportunity related list is used on a contact record to add a new or existing opportunity to the contact, Salesforce adds the contact to the Contact Roles related list on the opportunity.
- Lightning Experience merges a product's standard and custom price book entries into a single Price Books related list. This is different from Salesforce Classic, which has separate related lists for Standard Prices and Price Books. If you previously removed the Price Books related list because your org uses standard prices only, you should add it back to the Product page layout so your users can see standard prices in Lightning Experience.
- On the detail page for objects that support activities, Lightning Experience doesn't display the Open Activities and Activity History related lists along with other related lists. It displays the activity timeline instead. Objects that support activities include opportunities, leads, accounts, contacts, contracts, and custom objects on which you enable activities.

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.

- Following records directly from a list
- Sharing list views with groups
- Clone list views
- Some mass actions, including modifying or deleting multiple items in a list at once or sending mass email
- Custom actions
- Drag-and-drop scheduling for account, contact, and lead list views
- Feeds
- The icon to create a printable view of a list

List views display and behave differently in Lightning Experience.

- You don't go to a new page to create a list view. Instead, you stay on the same page and give the list view a name in a pop-up dialog box. You add filters to customize your list with a panel that slides out on the right side of the page.
- You can estrict list views only by selecting All or My. Other options, such as restricting by queue, campaign, or price book, aren't available.
- 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 2000 views. The menu loads views in batches of 50 as you scroll down. Recently viewed lists appear first, followed by other list views in alphabetical order. Recently viewed lists and the Search box appear only if there are 11 or more list views.
- 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.
- Inline editing of fields in a list view is available for list views that contain only one record type. However, the list view can't use filter logic with OR clauses. You can edit selected fields on multiple records and then save them all at once. Some standard and custom fields aren't editable inline.
- You can select multiple items in a list view to do a mass action on them. But you can't mass-edit records — that is, select multiple records, modify one field on a record and then apply the change globally to all the records.
- List views load only 50 items at once without scrolling. To select more than 50 items, scroll to load the last item and then select the range of items.
- Limited row-level actions are available. For most objects, available actions are Edit and Delete. For leads, 2 more actions are available: Convert and Clone. For files, available actions are Edit, Delete, and Download.
- Custom buttons are available, but can't be configured to do record action or mass actions like mass edit or mass delete. For example, an admin can create a button that launches a Visualforce page.
- For filter criteria, only these relative date ranges are supported: Today, Tomorrow, Yesterday, This Week, This Month, This Quarter, This Year, Last Week, Last Month, Last Quarter, Last Year.
- List views in Lightning Experience don't support *`starts with`* as a filter criterion for ID fields. An ID field is a 15-character field that identifies a record. For example, the `Account ID` field on the contact object identifies which account a contact is associated with. You *can* use *`starts with`* as a filter criterion for other fields.
- In filter logic statements, NOT doesn't work with parenthetical expressions. For example, the expression *`1 AND NOT (2 AND 3)`* evaluates as *`1 AND (NOT 2 AND 3)`*. In the filter results, no records are returned when you'd expect to see some records.
- Filters support values only between the minimum and maximum for a signed 23-bit integer, or between 1 and 2,147,483,648. A value outside of this range disables that filter.
- 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 2 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.

Kanban View

- The Kanban is not available from the Recently Viewed list view. Users must select another list view before they can switch to the Kanban.
- The Kanban shows records for only 1 record type at a time. If your organization uses multiple record types, 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 Kanban view displays a maximum of 200 cards.
- Columns aren't created from inactive picklist fields. Records in a state or status that is inactive aren't included in the Kanban view.
- Drag-and-drop functionality isn't supported for touchscreens.
- Users receive alerts on opportunities with overdue tasks, no open activities, or no activity in the last 30 days. The alerts aren't customizable.
- Leads can't be converted in the Kanban view, and contracts can't be activated.
- Columns aren't created for any Lead Status value with a state of `Converted`.
- A column isn't created for the standard Contract Status of `Activated`.

Work with Data

Create and Edit Data

Inline editing of fields on a record's Details tab is available in Lightning Experience. But it's not possible to edit individual fields in the Highlights panel on a record.

These features aren't available in Lightning Experience.

- Inline editing on records
- Editing multi-line layouts

Print Data

These features aren't available in Lightning Experience.

- Printing a page
- Generating a PDF file

Salesforce Sidebar

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

Recycle Bin

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 available in Lightning Experience.
- Users with Accessibility mode turned on must switch to Salesforce Classic to use the Report Builder to create and edit reports.

  Users with Accessibility mode turned on can use the Dashboard Editor to create and edit Lightning Experience dashboards, but must switch to Salesforce Classic for a fully accessible experience when using the Dashboard Editor.

SEE ALSO:

Productivity Features: What's Not in Lightning Experience

Files and Content: What's Not in Lightning Experience

Sales Features: What's Not in Lightning Experience

Learn about the issues 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

Social Accounts, Contacts, and Leads

- 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 can't require different fields in different stages using the page layout. You can, however, set up validation rules based on the sales path stage.
- 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.
- 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.

Contacts to Multiple Accounts

- Only the row level actions that are specific to the Account Contact Relationship object are available on the Related Accounts and Related Contacts related lists. Therefore, you see actions to view or remove the account-contact relationship, but not to edit or delete the contact or account record.
- In the Related Accounts related list, the `Account Name` field appears only if the user has access to the account. If they don't have access to the account, only the Account Contact Relationship fields appear.
- When a contact is created from the Related Contacts related list on an account, the contact's mailing address isn't populated with the account's billing address.
- If you use person accounts, switch back to Salesforce Classic to add the Related Accounts related list to the person account page layouts your reps use.

Features Not Available in Lightning Experience

- Forecasts (including Collaborative Forecasts and Customizable Forecasts)
- Orders
- Divisions
- Mass Division Transfer

Accounts

Person Accounts (Beta)

- Person accounts aren't accessible from Setup. Switch to Salesforce Classic to set up and configure person accounts.
- When hovering over a person account link, the quick view display differs based on where the person account link is. If the link is in the field that represents the contact (for example `Name` or `Contact`), then contact information is displayed. If the link is in the field that represents an account (for example `Related To` or `Account`), then person account information is displayed.
- The quick actions for business accounts are included on person account page layouts even though not all business account quick actions are valid for person accounts. For example, person account page layouts include the New Contact quick action even though contacts can't be associated with person accounts in this way. Admins can remove the invalid business account quick actions from person account page layouts.
- In some lookup fields, account or contact icons are shown instead of the person account icon.
- When creating a case for a person account and users add the person account to either the `Contact Name` or `Account Name` field, the other field doesn't auto-populate with the person account until the case is saved.
- When creating an email from a person account record, the `To` field doesn't auto-populate with the person account's email address the way it does when creating an email from a contact record.
- When using a template to compose an email from a business account, the template could include person account merge fields, which prevents the email from being sent. Similarly, when using a template to compose an email from a person account, the template could include business account merge fields, which prevents the email from being sent.
- If using merge fields in an email to a person account, the contact merge fields don't show up in the merge field search results. Instead, contact merge fields must be entered manually.

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.

Account Teams

It's possible to view, update, and delete account teams in Lightning Experience, with these differences from Salesforce Classic:

- Users can add, edit, or delete only one account team member at a time.
- The account team is always retained when the account owner is changed.
- When organization wide default sharing for contacts is set to private, the contacts added to Account Teams don't default to private.

Switch back to Salesforce Classic to:

- Change the team member display order.
- Display access levels for all team members or delete all team members with a single button.
- Add multiple account team members on a single page.

Features Not Available in Lightning Experience

- Account hierarchy (however, we recommend using the free AppExchange package Lightning Account Hierarchy)
- Account history
- Account merge
- Account partners
- Account territories
- Contact roles on accounts

Campaigns

Features Not Available in Lightning Experience

- Campaign results across hierarchies
- Campaign Influence 1.0 (Customizable Campaign Influence is available.)
- Cloning campaign members
- Adding multiple campaign members from list views

Contacts

Opportunities Related List on Contacts

- When the Opportunity related list is used on a contact record to add a new or existing opportunity to the contact, Salesforce adds the contact to the Contact Roles related list on the opportunity.

Features Not Available in Lightning Experience

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

Contracts

Features Not Available in Lightning Experience

- The Contract History related list isn't available.
- Status picklist values aren't filtered based on a contract's status, so all status values appear in the picklist. If you choose a status that's invalid for a contract, an error message lists the values that are valid for the contract. For example, for new and cloned contracts, Draft is the only valid value.

Leads

When changing a lead's owner to a queue, all active queues are displayed, not just queues for leads.

Features Not Available in Lightning Experience

- Assignment rules when manually creating leads
- Automatic field population for accounts created during lead conversion

Opportunities

Opportunity Teams

It's possible to view, update, and delete opportunity teams in Lightning Experience, with these differences from Salesforce Classic:

- Users can add, edit, or delete only one opportunity team member at a time.
- The opportunity team is always retained when the opportunity owner is changed.

Switch back to Salesforce Classic to:

- Change the team member display order.
- Display access levels for all team members or delete all team members with a single button.
- Add multiple opportunity team members on a single page.

Opportunity Products

- Users can add only one product to opportunities or price books at a time in Lightning Experience. It's not yet possible to select multiple products from a list.
- Users can add products with schedules in Lightning Experience, but must switch back to Salesforce Classic to enable product schedules, or to establish or modify schedules for products.
- Opportunities with products can't be cloned.

Opportunity Email Quotes

You can't email a quote directly from the PDF preview, the quote detail page, or next to the PDF in the Quote PDFs related list. Instead, create and save a quote PDF from Salesforce, and then download the PDF and email it using your local email app.

Opportunity Search Quotes

You can't search for quotes by record number or name in Lightning Experience.

Contact Roles on Opportunities

Users can add only one contact role to an opportunity at a time.

Features Not Available in Lightning Experience

- Big deal alerts
- Opportunity Splits
- Similar Opportunities
- Multi-line layout editing
- Opportunity stage history

The opportunity owner can't edit the `Forecast Category` field. `Forecast Category` is automatically populated, based on the value of the `Stage Opportunities` field, when you save the record. The opportunity owner can manually edit the value for `Forecast Category` in Salesforce Classic.

Products and Price Books

Products and Price Books

- Lightning Experience merges a product's standard and custom price book entries into a single Price Books related list. This is different from Salesforce Classic, which has separate related lists for Standard Prices and Price Books.

  If you previously removed the Price Books related list because your org uses standard prices only, you should add it back to the Product page layout so your users can see standard prices in Lightning Experience.

- 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. We recommend creating this list view to give your users access to price book records.

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: What's Not in Lightning Experience

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 leads and opportunities.

Home Features Not Available in Lightning Experience

- Alert banners
- Chatter feed and publisher
- Recommendations
- Full calendar

  Home shows upcoming events for the current day and includes a link to see all events scheduled for the day. But Home doesn't include a full calendar like is available on the Salesforce Classic home page. Instead, access the Calendar item from the navigation bar.

Global Actions Menu

The contents of the Global Actions menu in Lightning Experience is pulled from global actions in the Salesforce1 and Lightning Experience Actions section on the global publisher layout. Currently, only actions with these action types are supported in this menu.

- Log a Call
- Create a Record—for events, notes, and tasks

Other global actions on the global publisher layout, including actions that create records for custom objects or accounts or opportunities, don't appear in this menu.

Activities: Events and Tasks

Overall activities features that behave differently or are unavailable in Lightning Experience include activity views and editing, activity reminders, recurring and follow-up activities, and activities related lists.

Activity Views and Editing

List views for events and tasks are unavailable in Lightning Experience. Users can't edit events or tasks owned by people below them in the role hierarchy. However, they can use reports to view events and tasks owned by people below them in the role hierarchy. 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.

Activity Reminders

Users can't set or view activity reminders (reminders of upcoming events or tasks due).

Recurring Activities

Lightning Experience doesn't support recurring events or tasks, including creating and editing series. However, users can view and edit individual occurrences of a recurring event created in Salesforce Classic.

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.

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. You can customize the activity timeline using the Lightning App Builder.

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.

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 essential 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. The icons for activity types (events, tasks, calls, and email) in the timeline aren't customizable.

Activities: Events and Calendars Only

Event and calendar features that behave differently or are unavailable in Lightning Experience include business hours settings, Outlook appointments, event invitations, calendar views, sharing, and ownership, public calendars and resource calendars, a limit on calendar items displayed, and Cloud Scheduler.

Business Hours

Calendars don't indicate the business hours selected in personal settings.

Outlook Appointments

You can't create a Microsoft® Outlook® appointment from a Salesforce event.

Event Invitations

Event invitations are unavailable, including inviting others to events, updating invitations to events, accepting and declining invitations, and viewing a related list of invitees.

Calendar Views

The calendars in Lightning Experience have no month view or print view. You can't hide weekends.

List View Filtering

No list views are available for filtering calendars based on the Events or Tasks objects. For calendars created from other objects, list views with the scope My and All are supported, but list views with the scope My Team are not.

Calendar Item Limit

You can view up to 150 calendar items total in the day or week view, including Salesforce events and the items on calendars you create. Suppose that you select a calendar containing enough items to push the total past the limit in that view. Lightning Experience displays an alert and hides items on other calendars.

Calendar Sharing and Ownership

You can't share your calendars with your manager or other coworkers. Managers in the role hierarchy can use reports to view events owned by people below them in the role hierarchy, but not to edit them.

Only one person can own a meeting. If you reassign a meeting to someone else, it no longer appears on your calendar.

Public Calendars and Resource Calendars

You can't create public calendars or resource calendars, and if you use Lightning Experience, you can't view public calendars or resource calendars created in Salesforce Classic.

Cloud Scheduler

Lightning Experience doesn't support Cloud Scheduler meeting requests.

Activities: Tasks Only

Task features that behave differently or are unavailable in Lightning Experience include the task list, closing and reopening of tasks, task assignment notifications, and group tasks.

Display and Order of Fields in Task List

Use compact layouts to customize the display and order of fields for items in the task list. However, certain fields remain in the task list even if you remove them from a layout, because they contain essential 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.

Overdue Tasks in Task List

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

Closing and Reopening Tasks

Suppose that your Salesforce org has a validation rule for tasks; for example, you have to enter a comment before closing a task. If your org has more than one Closed status for tasks, you have to choose a status when you reopen or close a task. If your org has more than one Open status for tasks and you reopen a task, Lightning Experience remembers the last Open status.

Task Assignment Notifications

Lightning Experience displays no option to send an email when you assign a task to someone. It also displays no personal setting to receive an email when someone assigns you a task. However, suppose that you switch from Lightning Experience to Salesforce Classic. In that case, you can receive emails for tasks that you assign to yourself or tasks created with a status of Completed. These options depend on how your Salesforce admin sets up your org.

Group Tasks

You can't assign copies of a task to coworkers.

Notes

Notes in Related Lists

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.

Collaborator Access for Notes

When sharing a note in Lightning Experience, you can only give View access to others. Notes does not support simultaneous editing. So, this restriction prevents multiple users from editing a note at the same time, which would result in users overwriting each other's content.

Integrated Email

Supported Objects

Integrated Email is fully supported for the Account, Campaign, Case, Contact, Leads, and Opportunity objects only, and not for custom objects. The Person account record type is partially supported: It doesn't offer Contact merge fields. From records for those objects, you can send email to contacts, leads, and users maintained in Salesforce, as well as to any valid external email address.

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 add only Opportunity 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 the Lead object are not available for emails sent from opportunity records.

Mass Email

Mass Email is not supported, which means that users can't access the `Mass Email Contacts` link from Contacts.

Standard and Extended Mail Merge

The `Mail Merge` button on Salesforce records that lets users generate Microsoft® Word documents with merged fields from Salesforce isn't available.

However, if users want to take advantage of merge fields when contacting their customers, users can send individual emails from Lightning Experience that include merge fields from Salesforce records.

Hyperlink Fields in Mail Merge

Hyperlink formula fields are not supported as merge fields.

Email Activity

After you send an email, a task record is created to track the action and store email content. If you sent the email to a contact or lead, the task link is added to the Recent Activity feed for that record. If the recipient is 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 in Lightning Experience support rich text and are sent as HTML.

Email templates created in Salesforce Classic (text, HTML with letterhead, and Visualforce) can't be used in Lightning Experience and vice versa. However, admins can add or remove Salesforce Classic email templates from Lightning Experience `Setup`.

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.

Emailing Tracking

Email tracking and the HTML Email Status related list are not 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: What's Not in Lightning Experience

Learn about the issues to expect if your organization uses customer service tools. In general, Service Cloud data and features aren't supported in Lightning Experience. Standard Field Service Lightning features—including service appointments, service resources, service territories, operating hours, work orders, and work types—are fully supported, as are assets. Cases are supported but don't have full parity with what's available in Salesforce Classic. Open CTI is supported, but it has functional differences from Open CTI for Salesforce Classic.

Cases

When changing a case's owner to a queue, all active queues are displayed, not just queues for 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.

You can add or remove case feed publishers, but rearranging the case layout or adding custom buttons and links isn't supported.

Close Case Layout

For simplicity, the close case layout isn't available, but you can add closed statuses to case edit pages. From the Support Settings page in Setup, select `Show Closed Statuses in Case Status Field`.

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.

Case Assignment Rules

Case assignment rules aren't supported; however, you can create similar rules with the Lightning Process Builder. If you select `Case Assignment Checkbox` on case page layouts, `Assign using active assignment rules` appears on cases, but it doesn't trigger assignment rules when it's selected.

Replying to Social Posts in the Case Feed

Like, Unlike, and Delete on social posts are supported while in Salesforce Lightning. However, replying to posts must be done in Salesforce Classic.

Open CTI and Call Centers

There are separate Open CTI APIs for Salesforce Classic and Lightning Experience. You can't swap the two Open CTI APIs in custom JavaScript code because they behave and function differently. For detailed information about the two APIs, including differences in functionality, see the *Open CTI Developer Guide*.

Keep the following things in mind when working in Lightning Experience:

- The out-of-the-box Call Center app is a Salesforce Classic app. If you use softphones in the Call Center app, those softphones don't work when the Call Center app is launched from Lightning Experience. Open CTI for Lightning Experience works only in Lightning apps, and Open CTI for Salesforce Classic works only in Classic apps.

  To use Open CTI for Lightning Experience, create a Lightning Experience app.

- Open CTI for Lightning Experience doesn't support screen pops that open in a new browser tab or window.

Unsupported Service Cloud Features

Except for Open CTI, Assets, basic Cases, Social Posts and Personas, and standard Field Service Lightning features, Lightning Experience doesn't support any Service Cloud features, including the Salesforce Console. The Field Service Lightning managed packages are not supported in Lightning Experience.

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.

The following features aren't available in Lightning Experience:

- Knowledge Articles
- Omni-Channel
- Entitlements
- Milestones
- Macros

SEE ALSO:

Open CTI Developer Guide

Reports and Dashboards: What's Not in Lightning Experience

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 Available with Limitations in Lightning Experience

Feature	Notes about Lightning Experience Availability
Tabular Views of Historical Trend Reports	Historical trend reporting with charts is supported in Lightning Experience, but tabular views of historical trend reports aren't available.
Export Reports	Reports exported from Lightning Experience never include a disclaimer that reads "Confidential Information - Do not

Feature	Notes about Lightning Experience Availability
	Distribute" in the report footer. The disclaimer is excluded even if you disable the **Exclude Disclaimer from Exported Reports** setting in setup.
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. • Row limit filters • Historical field filters • Standard filters (except for date, picklist, and string filters)
Subscribe to Reports	In Lightning Experience, users can subscribe to reports, but can't set notification conditions and can only receive report results via email.

Features Not Available in Lightning Experience

Feature	Notes about Lightning Experience Availability
Joined Reports	
Schedule Report Refreshes	Scheduled report refreshes from Salesforce Classic continue to work in Lightning Experience. Instead of scheduling report refreshes, users can subscribe to reports 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.
Add to Campaign	
Accessibility Mode for the Report Builder	Users with Accessibility Mode turned on must switch to Salesforce Classic to create and edit reports.

Other Notes about Using Reports in Lightning Experience

Feature	Notes about Lightning Experience Availability
Object Support for Reporting	Even though Lightning Experience doesn't support all the standard Salesforce objects yet, the Report Builder in Lightning Experience does. Users can create and view reports for all standard objects. Reports related to objects not yet supported in Lightning Experience open directly in the new interface and behave like any other report.

Dashboards

Considerations When 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.

Features Not Available in Lightning Experience

Feature	Notes about Lightning Experience Availability
Create, Edit, or Delete Filtered Dashboards	Lightning Experience users can view filtered dashboards. Filtered dashboards always open with no filters applied. It's possible to apply or clear filters that were added in Salesforce Classic. Switch to Salesforce Classic to create, edit, or delete filtered dashboards, or to add, change, or remove dashboard filters.
Create, Edit, or Delete Dynamic Dashboards	Users can view dynamic dashboards, but must switch to Salesforce Classic to create, edit, or delete them.
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.
Post a Dashboard Component to Chatter	
Visualforce Components on Dashboards	
Link from a Dashboard Component to a Website or Email Address	
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.

Folders

Features Not Available in Lightning Experience

Feature	Notes about Lightning Experience Availability
Standard Folders, containing default reports and dashboards that come packaged with Salesforce	
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.

Feature	Notes about Lightning Experience Availability
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

Considerations When Using Charts in Lightning Experience

Feature	Notes about Lightning Experience Availability
Table Charts	Table charts display Chatter photos and show conditional highlighting, but users must switch to Salesforce Classic to configure these features.
Combination Charts	Combination charts which include both a stacked vertical bar chart and a line chart only show the stacked vertical bar chart. The line chart is not drawn. Combination charts with two groupings and a line chart display differently in Lightning Experience than they do in Salesforce Classic. In Lightning Experience, the line chart depicts both groupings. In Salesforce Classic, the line chart only depicts 1 grouping (the first one). To add a combination chart to a dashboard, or to edit one, switch to Salesforce Classic. A vertical combination chart with two groupings, two measures, and a line chart displays as a bar chart in Lightning Experience. The bar chart displays two groupings, but the measure depicted by the line chart isn't shown.
Funnel Charts	To add a funnel chart to a dashboard, or to edit one, switch to Salesforce Classic.
Gauge Charts	Breakpoints in gauge charts only accept whole numbers. For example, `5` is a valid breakpoint, but `5.1` isn't. On reports, gauge charts appear as a bar charts.
Scatter Charts	To add a scatter chart to a dashboard, or to edit one, switch to Salesforce Classic.
Combine Small Groups into "Others"	To combine small groups, switch to Salesforce Classic.
Maximum Values Displayed	When a dashboard component has more than one grouping, setting "Maximum Values Displayed" results in slightly different behavior between Salesforce Classic and Lightning Experience. In Salesforce Classic, the maximum number of displayed values counts only the first grouping.

Feature	Notes about Lightning Experience Availability
	In Lightning Experience, the maximum number of displayed values counts both the first and second grouping. Depending on how records are grouped, the appearance of a dashboard component can change between Salesforce Classic and Lightning Experience. For example, on a stacked bar chart, you set "Maximum Values Displayed" to 10. You see 10 stacked bars in Salesforce Classic, but only see 6 stacked bars in Lightning Experience.
Chart Editor	In the chart editor, users can't: • Change sorting direction (except in table charts, which support sorting) • Change measurement units (for example, from meters to centimeters) • Add more than 2 aggregates • Use charts from source reports
Number of Groupings Displayed on Charts	In dashboard components, charts display up to 200 groupings. If a data-supplying report returns more than 200 groupings, then only the first 200 groupings display in the dashboard component. In reports, charts display up to 2,000 groupings.

Features Not Available in Lightning Experience

Feature	Notes about Lightning Experience Availability
Pie Charts	Pie charts from Salesforce Classic display as donut charts in Lightning Experience.

Files and Content: What's Not in Lightning Experience

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 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. Unlike files, attachments are associated only with a particular record and can't be shared further. In Lightning Experience, uploads to the Notes & Attachments related list are files. In Salesforce Classic prior to Spring '16, uploads to this related list were always attachments instead of files. For existing orgs, 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.

  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, row-level actions (such as Edit or Delete) aren't available for the Files related list, Notes & Attachments related list, and related lists on the Files Detail page . Delete and manage files using the row-level actions on Files home, or the quick actions on a file's preview or detail page.
- Making files private isn't available in Lightning Experience.
- Sharing files via link isn't available in Lightning Experience.

File Syncing

File syncing isn't available in Lightning Experience. But Files home includes a Synced filter, so users can easily access any files they synced in Salesforce Classic.

Salesforce CRM Content

You can't create or manage libraries in Lightning Experience, but files that are in libraries are available in the new interface. Files in libraries are available from Files home, and users can share them and interact with them just as with Salesforce Files. Users can browse any libraries they have access to, and access the files that are in them from a filtered view on Files home.

Documents

Documents isn't available in Lightning Experience.

Files Connect

Users can't browse content in external data sources from Files home in Lightning Experience, but they can do so when selecting files to attach to feed posts. Users can also access external file references that were created in Salesforce Classic.

Chatter: What's Not in Lightning Experience

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.

Chatter Feeds

Chatter Publisher

Users can compose these post types in Lightning Experience:

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

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

Sharing Posts

Users can't share posts with groups or followers.

Filter and Sort Feeds

Users can't use filters to condense the number of posts that appear in feeds.

Approvals in Chatter

Lightning Experience users can't see approval requests in Chatter or in the activity timeline on records. 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).

Chatter Topics

Chatter Topics aren't available.

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 Questions

When a user asks a question similar to one that's been asked, no auto-complete options are presented as they are in Salesforce Classic.

People and Profiles

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.
- Users with Chatter External licenses can't edit their profile.
- Your Community profile photo in Lightning Experience is larger and displays at a higher resolution than in Salesforce Classic. Profile photos uploaded in Salesforce Classic won't look great in Lightning Experience until you upload the photo in Lightning Experience.

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.
- Use the Invite People option to invite customers to join groups using their email addresses. Instead, you must create users in your org for these customers, then use the Add Member action to add them to the group.
- View the group email address or the Post by email link.

  If they know or have saved the group email address from Salesforce Classic, users can still email the group to post to the group via email.
- Access Chatter-wide notification settings from the group notification settings.
- Remove files from the group files list.

Other Salesforce Products: What's Not in Lightning Experience

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

- Salesforce Communities

  Note: Communities use the Lightning Experience login experience. Additionally, Salesforce Communities setup pages are available in Lightning Experience.

- Community Builder
- Pardot
- RelateIQ

Navigation and Actions: What's Not in Lightning Experience

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

Lightning Experience Navigation Bar Replaces the Tab Bar

The concept of tabs that 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.

The default navigation bar provides access to 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

By default, apps (including Salesforce *tabset apps* and connected apps) and custom objects aren't included in the default Lightning Experience navigation bar. If your org uses the default navigation bar, users can access these items from the App Launcher, by clicking in the header. Custom objects appear in the list of **All 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.

Custom Lightning Experience Navigation Bars Support Most Apps and Objects

You can create custom Lightning Experience apps with custom navigation bars and assign them to user profiles. For example, create a Lightning app for your finance department that includes all the important items they need to complete common tasks. With some exceptions, you can include many of the apps, objects, and other items (including Visualforce tabs, Lightning Page tabs, and Lightning component tabs) that appear in the Lightning Experience App Launcher.

You can include these Salesforce objects in custom navigation menus: Accounts, Assets, Campaigns, Cases, Contacts, Files, Dashboards, Events, Knowledge Articles, Leads, Opportunities, Price Books, Products, Reports, Tasks, Tenants, Work Orders, and your custom objects. You can also add Home, the main Chatter feed, Groups, and People.

You can't include connected apps—such as Gmail™, Microsoft Office 365™, and other apps from Salesforce ISVs—in custom Lightning Experience app navigation bars.

Users can continue to access connected apps from the App Launcher.

There's no connection between the Lightning Experience and Salesforce1 navigation menus. Changes that you make to the Salesforce1 navigation menu have no impact on the default or custom Lightning Experience navigation bars, and vice versa.

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. However, these options aren't supported in some areas of the app, 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 Setup pages in Lightning Experience

Shortcuts do work to open nodes from the Setup menu into a new tab or window. However, the Schema Builder and Data Import nodes open in Salesforce Classic instead of in Lightning Experience.

Return and Enter Keys Behave Like Save Action in Lightning Experience

The keys used to create line breaks in long text areas behave a bit differently in Lightning Experience. If your cursor is in the long text area and you press the Return or Enter key, the cursor leaves the text area and selects the Save button. To add a line break, press Shift+Enter instead.

Actions and Buttons

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

- Deep Clone
- Mass Delete
- Some mass actions on object home pages and list views, including modifying or deleting multiple items in a list at once or sending mass email
- Sharing buttons (except for Salesforce Files, which includes file sharing options on Files home, file detail pages, and in the file preview player)
- Custom buttons with a content source of OnClick JavaScript
- Custom buttons with a content source of URL that pass parameters to standard pages in Salesforce Classic, such as pre-populating fields when creating a record

Quick actions on external objects aren't supported.

SEE ALSO:

What's the Fate of Existing Salesforce Customizations?

Point-and-Click Customization: What's Not in Lightning Experience

Search: What's Not in Lightning Experience

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

The following objects, which are searchable in Salesforce Classic, aren't searchable in Lightning Experience: Activities (Events and Tasks), Attachment, Coaching, Community, Contract Line Item, D&B Company, Document, Discussion, Entitlement, Goal, Idea, Live Chat Transcript, Macro, Metric, Order, Performance Cycle, Question, Quick Text, Quote, Resource Absence, Reward Fund, Reward Fund Type, Salesforce CRM Content, Self-Service User, Service Contract, Service Resource Skill, Service Territory Member, Skill, Solution, Topic, User, and Work Order Line Item.

Search Results Can't Be Filtered

The "exact phrase" and "limit to items I own" filter options aren't available on search results pages. In addition, you can't filter search results. Sorting is available, except for Chatter groups, files, and Knowledge articles. 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. Admins can instead add related lookup filters, which restrict the valid values and search results for lookup fields. Related lookup filters limit results for specific values, such as record type or status. Related filters are beneficial when you need a more generic filter that doesn't over-limit results for users. For users, lookup search results also use the same rankings as global searches to show users the most relevant results first.

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. To see results for other objects, click object names on the left side of the page, under Search Results. Searchable objects are listed in the same order they appear in the navigation bar. If you don't see an object listed under Search Results, select **Show More** to see all objects available to you, listed in alphabetical order.

No Snippets for Knowledge Articles in Top Results

Snippets aren't shown when Knowledge articles appear in Top Results search results. Snippets are shown when the search is scoped to Articles. In addition, you can't customize which columns appear in search results. The default columns are article number, publication status (if enabled by the admin), and last modified date.

Knowledge Articles Can't Be Sorted

In search results, sorting is not available for Knowledge articles.

No Sidebar or Advanced Search

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

No Pinning on the Search Results Page

You can't pin objects. Pinning from Salesforce Classic doesn't affect the order of the objects listed on the left side of the page, under Search Results.

Applications Doesn't Support Wildcard Searches

You can't use wildcards to perform a partially matching search for apps, 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.

Dependent Lookup Filters Not Supported

Admins can't set filters for lookups that reference fields on the current object record (the source). For example, configure the case `Contact` field to only show contacts associated with the account selected in the case `Account Name` field on the same record. However, related lookup filters, which restrict the valid values and search results, are supported. For example, configure the `Account Owner` lookup field to only show active users on the same record.

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, custom objects, events, leads, notes, opportunities, price books, products, and tasks. For other objects, create the desired object or record before using the lookup dialog search to associate records.

Org Setup: What's Not in Lightning Experience

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

Setup Pages

In most cases, Setup 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 Currency Management

Advanced currency management, or dated exchange rates, isn't supported in general. However, opportunities display the correct amount.

Language Support

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

Skype for Salesforce

Skype for Salesforce is available only in Lightning Experience.

SEE ALSO:

Point-and-Click Customization: What's Not in Lightning Experience

Programmatic Customization: What's Not in Lightning Experience

Data Import and Management: What's Not in Lightning Experience

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.com

Review the Data.com features that are unavailable in Lightning Experience.

Data.com Prospector

- Users can't search for or add leads.
- Users can't search contacts.

Tip: In Lightning Experience, users can search for and add contacts related to an account record.

- Users can't search accounts by industry classification.

Data.com Clean

- You can't enable or disable Data.com Clean.
- You can't configure Data.com Clean jobs or view Clean job metrics or analytics.
- If you're using a Clean job and don't have a Company Info rule enabled on the object, your users can't clean records manually. Even if the Clean button associated with Clean jobs is included in the object layout, the button isn't displayed in Lightning Experience.
- You can't modify fields on Clean Info objects (Account, Lead, and Contact).

Process Automation: What's Not in Lightning Experience

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.

Approval Requests

Finding 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.
- Lightning Experience users can't see approval requests in Chatter or in the activity timeline on records.
- 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).

Responding to Approval Requests

These options aren't available.

- Recalling approval requests.
- Reassigning approval requests.
- Manually selecting the next approver. For approval requests that require this manual selection, the approver needs to log in to the full Salesforce site.
- Unlocking a record that's locked for approval

Approval History Related List

The Approval History related list doesn't include the Submit for Approval button.

Flow Distribution

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

Paused Flow Interviews

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

Security: What's Not in Lightning Experience

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.

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.

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.

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.

Transaction Security

When selecting the action for a Transaction Security policy, two-factor authentication isn't available for the AccessResource event type. The Block action is used instead.

Platform Encryption

Encrypted data is not masked in Lightning Experience when using JSON serialization or Database.Query(). That data is rendered in plaintext, whether or not the user has the "View Encrypted Data" permission.

Point-and-Click Customization: What's Not in Lightning Experience

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.

Force.com Quick Access Menu
: This menu, with shortcuts to various app and object customization features, is available in Salesforce Classic only.

Custom Branding
: It's not possible to apply a custom logo to the new interface, but you can create a Lightning app with a custom logo and color.

Custom JavaScript Buttons

Custom buttons that use a JavaScript content source aren't supported in Lightning Experience. You can replace some of the functions covered by these buttons by using Lightning component actions, point-and-click tools like Process Builder or Visual Workflow, or code-driven approaches.

Custom Help

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. You can create a custom Lightning Experience record page with the Lightning App Builder, and assign different record pages to different Lightning apps. All users in the Lightning app 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—see Object Customizations That Aren't in the Object Manager. Access these 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.

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**.

Triggers

- Case Comment Triggers
- Email Message Triggers
- FeedComment Triggers
- FeedItem Triggers
- Group Triggers
- Group Member Triggers
- Group Record Triggers
- Topic Triggers
- TopicAssignment Triggers

Layouts

- Feed Item Layouts
- Group Layouts
- Publisher Layouts

SEE ALSO:

Navigation and Actions: What's Not in Lightning Experience

What's the Fate of Existing Salesforce Customizations?

Programmatic Customization: What's Not in Lightning Experience

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

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 they ran in Salesforce1. If your organization enables Lightning Experience, it’s also added to pages when they run in Lightning Experience.

In the past detecting the presence of `sforce.one` was a way to tell what user experience context your code was running in. Today there are better, supported methods for determining the user experience context.

If you’ve written code that makes assumptions about what the presence of `sforce.one` means, you’ll want to update it to use the new functions.

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 navigation menu.

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.

S-Controls

S-controls are an obsolete method of customizing the user interface of Salesforce. They are superseded by Visualforce and Lightning Components, which are superior in every way. S-controls aren’t available in Lightning Experience, and never will be. If your org depends on s-controls, you’ll need to replace them before you can move to Lightning Experience.

SEE ALSO:

What’s the Fate of Existing Salesforce Customizations?

Apps and Packaging: What’s Not in Lightning Experience

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. You can use the License Management App and the Environment Hub in Lightning Experience, but other ISVforce apps aren’t supported.

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

You can use the License Management App to manage licenses and support subscribers in Lightning Experience. You can also use the Environment Hub to create and manage your development, testing, and trial orgs in Lightning Experience.

These ISVforce features aren't supported in Lightning Experience:

- Channel Order App
- Trialforce
- Usage Metrics Visualization App

What to Expect in Lightning Experience When Chatter Is Turned Off

If your organization doesn't use Chatter, several 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 and groups aren't available on profiles.
- The Collaboration tab isn't available on records.
- Users can't follow records or other users.

EDITIONS

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

Lightning Experience Info Center

Check out these resources to learn about using Lightning Experience, setting it up for your organization, or developing for the new user interface.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Get Started Using Lightning Experience

Videos

Lightning Experience: Let's Take it for a Spin

Lightning Experience Video Series

Help

Find Your Way Around Lightning Experience

Trailhead

Sales Rep Trail—Using Lightning Experience

Evaluate and Roll Out Lightning Experience for Your Org

Help

What Makes Lightning Experience So Special?

Is Lightning Experience Right for Your Salesforce Org?

Transition to Lightning Experience: Let's Do This!

Lightning Experience Considerations

Lightning Experience Roadmap

Trailhead

Admin Trail—Starting with Lightning Experience

Admin Trail—Migrating to Lightning Experience

Lightning Experience Enablement Pack (Zip file)

Guides

Evaluate and Roll Out Lightning Experience for Your Org

Release Notes

Lightning Experience Features in Winter '17

Develop for Lightning Experience

Trailhead

Developer Trail—Lightning Experience

Lightning Experience Development Overview (Trailhead module)

Visualforce & Lightning Experience (Trailhead module)

Lightning Components (Trailhead module)

Lightning Design System (Trailhead module)

Lightning Experience Roadmap

Lightning Experience was built on feedback from more than 150,000 customers. And now that it's live, we've been collecting your ideas, comments, and requests to help us drive Lightning Experience forward. Here are some features and ideas we're working on.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note: Our forward-looking statement applies to this roadmap. Because roadmap items can change at any time, make your purchasing decisions based on currently available technology.

Feature	Winter '17	Spring '17	Future (Through Spring '18)
Analytics			
Dashboards: Percentage shown on gauges	✓		
Dashboards: Conditional highlighting	✓		
Dashboards: Create and edit dynamic dashboards		✓	
Dashboards: Drill to report from filtered dashboard	✓		
Dashboards: Edit filtered			✓
Dashboards: Edit running user		✓	
Dashboards: Edit table chart types			✓
Dashboards: Follow		✓	
Dashboards: Scheduling			✓
Reports: Accessible Report Builder			✓
Reports: Conditional formatting			✓
Reports: Dynamic filter via URL		✓	
Reports: Folder management			✓

Feature	Winter '17	Spring '17	Future (Through Spring '18)
Reports: Historical trending in tabular format			✓
Reports: Joined reports			✓
Reports: Printable view			✓
Reports: Relative date filters	✓		
Reports: Role hierarchy filter	✓		
Reports: Search within folders			✓
Reports: Sorting on aggregates			✓
Reports: Subscribe and schedule		✓	
Reports: Chart parity		✓	
	Chatter		
Feature	**Winter '17**	**Spring '17**	**Future**
Chatter: Edit posts	✓		
Chatter: Rich text in comments	✓		
Chatter: Share posts		✓	
Chatter: Topics			✓
Content Deliveries: Via email attachment	✓		
Content Deliveries: Generate link			✓
Files: Folders in libraries	✓		
Files: Folders anywhere			✓
Groups: Search groups	✓		
	Platform		
Feature	**Winter '17**	**Spring '17**	**Future**
Actions and buttons on related lists		✓	
Approvals component		✓	
Branding per app	✓		
Field help	✓		

Feature	Winter '17	Spring '17	Future (Through Spring '18)
Field history tracking			✓
Lightning Actions: Invoke a Lightning Component with Quick Actions	✓		
Lightning Actions: Standard action override with Lightning Component			✓
Lightning Mass Actions: Act on multiple records from a list view using a Lightning Action			✓
Lightning Pages: Assign by Record Type and Profile		✓	
List Sharing			✓
Lists: Inline edit	✓		
Lists: Mass actions	✓		
Lists: Mass action change owner			✓
Lookups: Dependent filtered lookups		✓	
Recycle Bin			✓
Related Lists: Mass actions		✓	
Sharing: Manual sharing			✓
Printable View and print page			✓
Page-level help			✓
Lists: Rolodex on lists			✓
Platform: Console			
Feature	**Winter '17**	**Spring '17**	**Future**
Accessibility		✓	
Keyboard shortcuts: Standard			✓
Keyboard shortcuts: Custom			✓
History utility		✓	
Multi-monitor support			✓
Navigation and Utility JavaScript API (Console Integration Toolkit)			✓

Feature	Winter '17	Spring '17	Future (Through Spring '18)
Person Account support			✓
Remember workspaces on logout		✓	
Related list components: Stacked and tab		✓	
Related list components: Accordion			✓
Split view (pinned list)			✓
Utility Bar		✓	
Workspaces and subtabs		✓	
Workspace components: Components spanning subtabs			✓
Visualforce components in Utility Bar			✓
Visualforce overrides support			✓
Sales			
Feature	**Winter '17**	**Spring '17**	**Future**
Accounts: Hierarchy		✓	
Accounts: Account partners			✓
Account Teams: Add and edit multiple members			✓
Calendar: Monthly view	✓		
Calendar: Scheduling and event invitees (external calendar required)			✓
Calendar: Recurring events			✓
Calendar: Sharing			✓
Campaigns: Add leads and contacts from list	✓		
Campaigns: Hierarchy		✓	
Campaign Members: Mass actions on related list, clone, manage status		✓	
Contact: Hierarchy			✓

Feature	Winter '17	Spring '17	Future (Through Spring '18)
Contracts	✓		
Divisions			✓
Emails: Classic templates available in Lightning Experience			✓
Emails: Quick Action on any object		✓	
Emails: Mass email			✓
Forecasting: Collaborative		✓	
Leads: Manually run assignment rules on create and edit		✓	
Lead Convert: Map custom fields to Account, Person Account, and Contact		✓	
Merge: Accounts and contacts		✓	
Merge: Leads	✓		
Merge: Person Accounts			✓
Opportunities: Owner editability of Forecast Category			✓
Opportunity Contact Roles: Add and edit multiple contacts			✓
Opportunity Products: Add and edit multiple products		✓	
Opportunities: Product schedules			✓
Opportunities: Clone with products			✓
Opportunities: Opportunity splits			✓
Opportunities: Stage history			✓
Opportunity Teams: Add and edit multiple members			✓
Orders		✓	
Person Accounts: Setup in Lightning Experience			✓

Feature	Winter '17	Spring '17	Future (Through Spring '18)
Person Accounts: Email template and merge field support		✓	
Person Accounts: Display all related records for a Person Account in related lists (Cases and Notes)			✓
Person Accounts: Customizable Lightning pages		✓	
Person Accounts: Duplicate Management		✓	
Products and Price Books: Archiving			✓
Quotes	✓		
Quotes: Email quote PDF		✓	
Tasks: Followup tasks		✓	
Tasks: Recurring tasks		✓	
Tasks: Reminders			✓
Enterprise Territory Management: Related list on account, territory field on opportunity			✓
Service			
Feature	**Winter '17**	**Spring '17**	**Future**
Cases: Manually run assignment rules on create and edit		✓	
Cases: Kanban			✓
Cases: Classic case comments			✓
Cases: Files component			✓
Cases: Feed filters			✓
Cases: Macros			✓
Cases: Bulk Macros			✓
Cases: Case teams			✓
Cases: Merge and split cases			✓

Feature	Winter '17	Spring '17	Future (Through Spring '18)
Cases: Topics			✓
Cases: Experts			✓
Lightning Knowledge: Record types replace article types		✓	
Lightning Knowledge: Unified object home with list views		✓	
Lightning Knowledge: Global search with Knowledge advanced search		✓	
Lightning Knowledge: Side panel in Console		✓	
Lightning Knowledge: Files component		✓	
Lightning Knowledge: Authoring actions		✓	
Lightning Knowledge: Thumbs up and down ratings component, plus update ratings		✓	
Lightning Knowledge: Lightning migration tools			✓
Lightning Knowledge: Importing			✓
Lightning Knowledge: Communities support			✓
Lightning Knowledge: Federated search			✓
Lightning Knowledge: Reporting			✓
Lightning Knowledge: Salesforce1			✓
Lightning Knowledge: Rich Text Editor (Quill replaces CKEditor)			✓
Lightning Knowledge: Console sidebar case actions			✓
Lightning Knowledge: Authoring actions in Process Builder			✓

Feature	Winter '17	Spring '17	Future (Through Spring '18)
Lightning Knowledge: Translation and multi-language support			✓
Lightning Knowledge: Mass actions			✓
Lightning Knowledge: Sharing and criteria based sharing			✓
Lightning Knowledge: Compare versions			✓
Lightning Knowledge: Compare and merge articles			✓
OpenCTI	✓		
OpenCTI for Console		✓	
Social customer service		✓	
Social customer service: Social conversation sidebar			✓
Social customer service: Facebook reviews			✓
Social customer service: Quote Tweets			✓
Service setup flow: Email to case Twitter Lightning		✓	
Service setup flow: Twitter Lightning		✓	
Service setup flow: Facebook Twitter Lightning		✓	
Service setup flow: Communities Lightning			✓
Service setup flow: Knowledge Lightning			✓
Service setup flow: Macros Lightning			✓
Service setup flow: Live Agent Lightning			✓
Service setup flow: SOS Lightning			✓

Feature	Winter '17	Spring '17	Future (Through Spring '18)
Omni			✓
Omni: Supervisor			✓
Live Agent			✓
Service contracts			✓
Entitlements			✓
SOS			✓

Features Not on Roadmap

There's no plan to add these Salesforce Classic features to Lightning Experience; however, there are features that replace them.

Salesforce Classic Feature	Replacement Lightning Experience Feature
Solutions	Salesforce Knowledge
Territory Management: Related list on account; territory field on opportunity	Enterprise Territory Management
Opportunity: Similar opportunities	None
Forecasting: Customizable	Collaborative Forecasting
Account: Account Contact Roles	Contacts to Multiple Accounts
JavaScript buttons	Lightning Actions

Walk Through Lightning Experience

Set Up a Sales Path in Lightning Experience: Walkthrough

Give your sales teams the guidance they need to close their deals with fewer delays—from anywhere. When you set up sales paths, you determine which fields are key for your sales reps to complete. You'll also provide tips, potential gotchas, and even words of encouragement to keep sales reps eager to close their deals faster.

Walk through it: Set Up a Sales Path in Lightning Experience

EDITIONS

Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Sales Path:
- "Customize Application"

To set up a sales path:
- "View Setup and Configuration" and "Modify All Data"

Create a List View for Opportunities in Lightning Experience: Walkthrough

Let's take a look at how you create a list view based on your own criteria. List views give you quick access to your important records.

Walk through it: Create a List View for Opportunities in Lightning Experience

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create a list view for opportunities:
- "Read" on opportunities

Check Out Setup in Lightning Experience: Walkthrough

Lightning Experience Setup makes it easier than ever to view and manage administrative setup tasks. Remember, this feature is available only in Lightning Experience.

Walk through it: Check Out Setup in Lightning Experience

EDITIONS

Available in All Editions

USER PERMISSIONS

To use Setup:
- "Customize Application"

Access and Edit Objects with the Object Manager: Walkthrough

Access all objects (like accounts and contacts) and their related attributes—fields, validation rules, page layouts, and so on—from one convenient place! Remember, this feature is available only in Lightning Experience.

Walk through it: Access and Edit Objects with the Object Manager

EDITIONS

Available in All Editions

USER PERMISSIONS

To access and edit objects in the Object Manager:

- "Customize Application"

Create, Edit, and Assign a Permission Set in Lightning Experience: Walkthrough

A permission set is a collection of settings and permissions that gives users access to various tools and functions. Permission sets extend users' functional access without changing their profiles.

Walk Through It: create, edit, and assign a permission set

EDITIONS

Available in: **Contact Manager**, **Professional**, **Group**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

USER PERMISSIONS

To create a permission set:

- "Customize Application," "View Setup and Configuration," and "Manage Profiles and Permission Sets"

To add permission to a permission set:

- "View Setup and Configuration" and "Manage Profiles and Permission Sets"

To assign a permission set:

- "Assign Permission Sets"