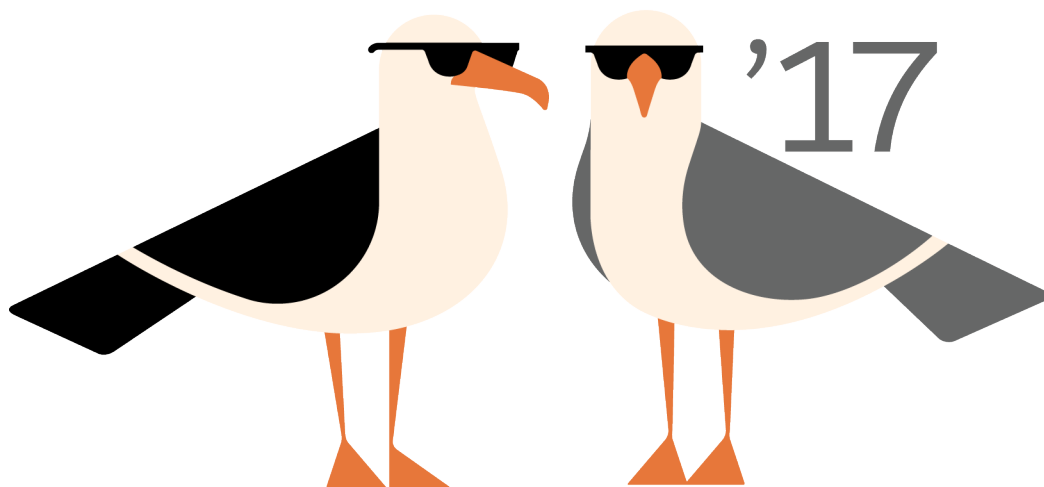salesforce

Evaluate and Roll Out Lightning Experience for Your Org

Salesforce, Summer '17

'17

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 framework, 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 how and when to roll out Lightning Experience to your org. This guide contains the details to help you evaluate the new interface, develop your rollout strategy, and make the switch to Lightning Experience.

What Makes Lightning Experience So Special?

Welcome to Lightning Experience, the modern, beautiful user experience from Salesforce. With a sales-and service-centric mindset, we focused on reinventing the desktop environment to better support your business processes. The result is an intuitive, intelligent interface that helps sales and service teams work more naturally and more productively. Let's take a peek at some of the key features of the new interface so you can see how much your users benefit when you switch to Lightning Experience.

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. Now let's go deeper and look at the use cases best suited for Lightning Experience, see how Lightning Experience features compare to what you're used to in Salesforce Classic, and review what happens to your existing customizations in the new interface. You can use this information to assess the value and benefit you get from Lightning Experience, and start to figure out when you'll be ready to switch some or all of your users.

Evaluate Your Org in Lightning Experience

Now that you understand the value of Lightning Experience and how it compares to what you're used to in Salesforce Classic, let's get more specific to you. With the help of several handy tools in the Lightning Experience Migration Assistant, you can personally evaluate how your production org works in Lightning Experience. Run the Readiness Check and get a report of potential issues. Preview your org in the new interface to see first-hand how things look. Then use the results of your analysis to help define the technical solutions and other development requirements you'll want to include in your rollout plan.

Roll Out 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 Roadmap

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

Lightning Components Roadmap

Lightning components are self-contained and reusable units that you use to assemble and configure new components or entire apps. The Lightning Component framework includes a set of prebuilt, out-of-the-box components to help kick start your development efforts. Here are some of the base components we're working on.

SEE ALSO:

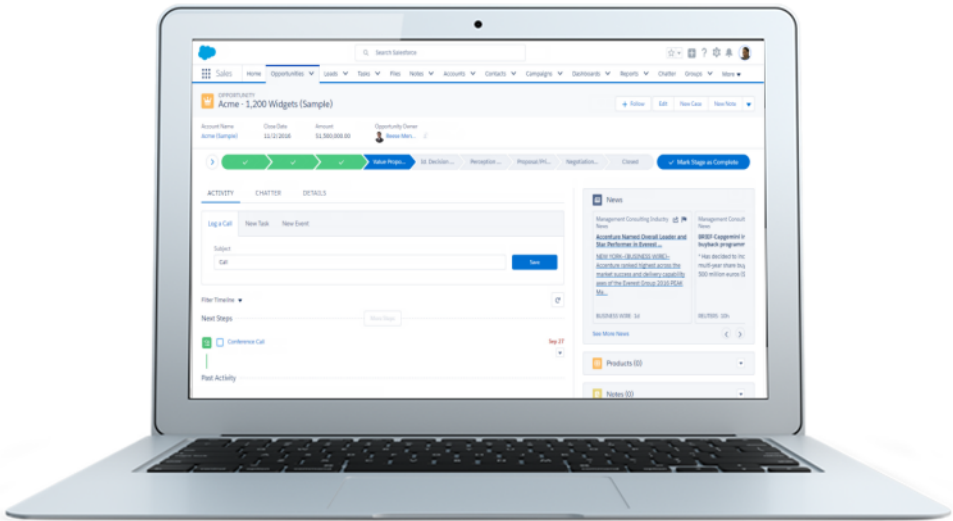Trailhead: Admin Trail - Migrating to Lightning Experience

Trailhead: Developer Trail - Lightning Experience

What Makes Lightning Experience So Special?

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Feature	Why It's Cool
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. And reps can work their deals more efficiently using the handy composer to quickly log calls, create tasks, send emails, and more.
Path	Guide reps along the steps of a process, such as working an opportunity from a fresh lead to a successfully closed deal. At each step, help your team succeed with step-specific guidance and resources.

Feature	Why It's Cool
Kanban	Visually review the status of your records for most objects. Drag records from one column to another. For opportunities, get alerts when an action is needed on a key deal.
Accounts and Contacts	Find information and see news at a glance from the new layout. Get the latest information about customers with integrated Twitter and news, review upcoming and completed activities, and keep data clean with field-level duplicate matching.
Salesforce Einstein	Supercharge the productivity of your sales, service, and marketing teams with artificial intelligence. With key predictions, intelligent recommendations, and timely automation, everyone can work smarter and faster.
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.
Notes	Take better notes with auto-save, rich text capabilities, inline images, and versioning. Relate a note to multiple records and share notes with teammates or Chatter groups.
Integrated Email	Relate emails to multiple contacts, leads, and users, and to a single opportunity, campaign, case, account, or person account. Send email through Gmail or Office 365 accounts with your Salesforce email. And see the emails you've sent in your Gmail or Office 365 Sent Items folder for seamless integration.
Composer Windows	Breeze through those minor but important activities that inevitably crop up during the day without switching context. Quickly log calls, create tasks and events, and jot down notes, all from windows that open on the current page.
Lightning Dialer	Use phone features without ever leaving Salesforce. Make and receive calls, add call notes, and log call information with ease.
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.
Live Feeds	See real-time posts in group feeds...and real-time comments in all feeds...without needing to refresh the page. Even see who's working on a comment while they're typing.
Streams	Combine up to 25 feeds into one super-feed to easily track related information in one place.
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 quickly 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.
Favorites	Create shortcuts to frequently accessed pages, including records, lists, and groups.

Feature	Why It's Cool
Search	Find records faster with improved global search, which includes top results and recent records.
Lightning Apps	Easily switch between collections of related objects, Visualforce and Lightning pages, and utilities like Lightning Dialer. Customize the branding of each app with logos and color.
Lightning Console Apps	Navigate and work more productively with optimized workflows and a three-column layout. View and edit multiple records at once and quickly access utilities like Lightning Dialer and Open CTI.
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.

SEE ALSO:

Video: Let's Take Lightning Experience for a Spin

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. Now let's go deeper and look at the use cases best suited for Lightning Experience, see how Lightning Experience features compare to what you're used to in Salesforce Classic, and review what happens to your existing customizations in the new interface. You can use this information to assess the value and benefit you get from Lightning Experience, and start to figure out when you'll be ready to switch some or all of your users.

Currently, Lightning Experience is geared toward sales teams and there's good parity with sales features in Salesforce Classic. For other Clouds, including Service Cloud, some features aren't available in the new interface yet. We're closing the gaps between Lightning Experience and Salesforce Classic with each new release. But in the meantime, part of your evaluation is to identify how critical upcoming features are to the timing of your rollout.

As you evaluate Lightning Experience, keep in mind that you can do a phased transition by enabling just a subset of your users. This flexibility means you can switch your Sales team but leave your Service org in Salesforce Classic until later. Or even better, start with a pilot group that can evaluate Lightning Experience features and assess how your processes and customizations are working. Use feedback from the pilot group to iterate on your implementation, then continue moving over other groups that benefit from your enhancements.

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

Salesforce Classic is still around and it's easy for Lightning Experience users to move between the old and the new. So even if Lightning Experience isn't a perfect fit yet, go ahead and turn it on. You and your users can quickly get back to the classic interface for the few things not yet available in Lightning Experience. Some occasional switching is usually worth the productivity benefits you get from the new experience.

Supported Editions and User Licenses for Lightning Experience

Let's look at the supported editions and user licenses to see if you 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 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, including features that are available in the new interface only.

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. But some customizations aren't useful or relevant in Lightning Experience. And some require updating to take advantage of all that Lightning Experience has to offer. Here are some issues to consider.

SEE ALSO:

Supported Editions and User Licenses for Lightning Experience

Lightning Experience Considerations

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

Salesforce Classic is still around and it's easy for Lightning Experience users to move between the old and the new. So even if Lightning Experience isn't a perfect fit yet, go ahead and turn it on. You and your users can quickly get back to the classic interface for the few things not yet available in Lightning Experience. Some occasional switching is usually worth the productivity benefits you get from the new experience.

Ideally, Lightning Experience meets the needs of everyone in your org. But just in case someone needs access to a feature or tool back in the classic interface, we provide the Switcher. By default, users enabled for Lightning Experience automatically get the Switcher. Which they can use to...wait for it...switch between Lightning Experience and Salesforce Classic whenever they need.

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

- In the Lightning Experience header, click the profile picture and select **Switch to Salesforce Classic**.
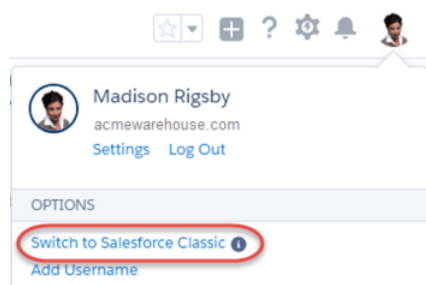
- In Salesforce Classic, click the name in the upper-right corner, then select **Switch to Lightning Experience**.

Each time a user switches to Lightning Experience or Salesforce Classic, that interface becomes the user's default experience.

> 💡 **Tip:** Want your users to go all in on Lightning Experience? Remove the Switcher and keep them in the new interface. See Make Lightning Experience the Only Experience.

SEE ALSO:

Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

Set Up Users for Lightning Experience

Supported Editions and User Licenses for Lightning Experience

Let's look at the supported editions and user licenses to see if you 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
	• 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

User Licenses

- Chatter Plus
- Chatter Free

Unsupported Licenses

- Force.com Free
- Work.com
- Database.com
- Content Only
- Ideas Only
- Knowledge Only
- Site.com Only

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.

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're looking to reboot your Salesforce implementation. This is a great opportunity to clean up or reinvision your business processes and introduce new features because you're doing change management anyway.

For now, consider sticking with Salesforce Classic for some of your teams if:

- Your sales team makes regular use of features that aren't available in Lightning Experience, such as territory management.
- Your service team has a robust knowledge base with Salesforce Knowledge.

EDITIONS

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

Compare Lightning Experience and Salesforce Classic

Understanding what you 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, including features that are available in the new interface only.

📝 Note: These lists aren't a complete view of the Salesforce Classic features that aren't available in Lightning Experience. Also check out Lightning Experience Considerations.

Salesforce Data

Feature	Lightning Experience	Salesforce Classic
Sales objects: Accounts, Campaigns, Contacts, Contracts, Leads, Opportunities, Orders, Person Accounts, Price Books, Products, Quotes	✔	✔

Feature	Lightning Experience	Salesforce Classic
Calendar, Events, Tasks	✔	✔
Service objects: Assets, basic Cases, Lightning Knowledge, 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[1]	✔	✔
Calendar[1]	✔	✔
Feed and publisher		✔
Items to approve	✔	✔
Customizable dashboards	✔	✔
Customizable home page components	✔	✔

[1] 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	✔	
Notes	✔	

Feature	Lightning Experience	Salesforce Classic
"Reference" page layout	✔	
Related lists	✔	✔
Integrated email and templates	✔	✔
Twitter highlights	✔	✔
Person accounts	✔	✔
Account teams	✔	✔
Account hierarchy	✔	✔
Contact hierarchy	✔	✔
Find and merge duplicate accounts and contacts	✔	✔
Matching and duplicate rules for business accounts, person accounts, and contacts	✔	✔

Campaigns

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	✔	
Activity timeline	✔	
Path	✔	
News	✔	
Notes	✔	
Change lead owner to a queue	✔	✔

Feature	Lightning Experience	Salesforce Classic
Integrated email and templates	✔	✔
Lead conversion customization via the API	✔	✔
Find and merge duplicate leads	✔	✔
Matching and duplicate rules for leads	✔	✔

Opportunities

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

Salesforce Einstein

Feature	Lightning Experience	Salesforce Classic
Analytics		
Einstein Discovery	✔	✔
Chatter		
Einstein Recommendations	✔	✔
Community		
Einstein Related Articles	✔	✔
Einstein Feed Search	✔	✔
Development		
Einstein Vision	✔	✔

Feature	Lightning Experience	Salesforce Classic
Sales		
Einstein Activity Capture	✔	
Einstein Lead Scoring	✔	
Einstein Opportunity Insights	✔	
Einstein Account Insights	✔	
Einstein Automated Contacts	✔	

Collaborative Forecasts

Feature	Lightning Experience	Salesforce Classic
Forecasting on opportunity Amount field, opportunity splits, overlay splits, custom opportunity fields, and product families	✔	✔
Revenue and quantity forecasts	✔	✔
Manager and owner adjustments	✔	✔
Cumulative forecast rollups	✔	✔
Support for multiple currencies	✔	✔
Quotas	✔	✔
Forecast hierarchy	✔	✔
Choose the product families to forecast on and the order they appear in (from Setup, if product family forecasts is selected)	✔	
Forecasts grid organized first by period, product family, and then user to show product family forecast totals	✔	
Forecasts grid expansion remains the same during each session	✔	
Opportunity split details in the opportunities list		✔
Processing indicator		✔
Adjustable column width		✔
Quota attainment information		✔
"Jump to"		✔
Forecasts setup		✔

Data.com

Feature	Lightning Experience	Salesforce Classic
Prospect for accounts (Only available with a Data.com Prospector license)	✔	✔
Prospect for contacts (Only available with a Data.com Prospector license)	✔	✔
Note: In Lightning Experience, you can search for and add contact data only if the contact is related to an existing account.		
Prospect for companies in the same company hierarchy (Only available with a Data.com Prospector license)	✔	✔
Prospecting Insights (Only available with a Data.com Prospector license)	✔	✔
View fields updated by Data.com Clean	✔	✔
"Stare and Compare" using Data Integration	✔	
Manually update a record using Data Integration	✔	✔
Clean button		✔
Prospect for companies, contacts, and leads using the **Data.com** tab (Only available with a Data.com Prospector license)		✔
View data integration rule settings and status (As of the Spring '17 release, Clean rules are known as data integration rules.)	✔	✔
Add Data.com contacts as leads (Only available with a Data.com Prospector license)		✔
See match rates for data integration rules (As of the Spring '17 release, Clean rules are known as data integration rules.)	✔	✔
Set up Clean settings, jobs, and preferences		✔
View Clean metrics and analytics		✔
Export Data.com records to comma-separated values (CSV) files. (Only available with a Data.com Prospector license)		✔

Customer Service

Feature	Lightning Experience	Salesforce Classic
Case Milestones	✔	

Feature	Lightning Experience	Salesforce Classic
Object Milestones	✔	
Service Contracts	✔	
Service Setup Flows for Email-to-Case, Communities, Knowledge, and Facebook and Twitter	✔	
Assets	✔	✔
Case Assignment Rules	✔	✔
Console[1]	✔	✔
Entitlements[2]	✔	✔
Field Service Lightning	✔	✔
Knowledge[3]	✔	✔
Open CTI	✔	✔
Products	✔	✔
Snap-ins for Web[4]	✔	✔
Social Customer Service	✔	✔
Case Comments		✔
Feed Filters in Case Feed		✔
Live Agent		✔
Macros[5]		✔
Omni-Channel		✔
Public Knowledge Base (PKB)		✔
Quick Text		✔
Solutions		✔
SOS		✔

[1] The Service Console in Lightning Experience doesn't yet have full parity with the Service Console in Salesforce Classic. Learn more.

[2] There are some limitations using Entitlements in Lightning Experience. Learn more.

[3] Lightning Knowledge is recommended for orgs that are new to Knowledge, or for existing orgs that can easily consolidate to one article type, have few data categories, and use single-language mode.

[4] Setting up Snap-ins Chat is available in Lightning Experience only.

[5] Macros can be created in Salesforce Classic only but they're executable in Lightning Experience.

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[1]		✔
Joined reports		✔
Pie charts		✔
Schedule report refreshes[2]	✔	✔
Follow reports		✔
Report notifications		✔
Export reports	✔	✔

[1] 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.

[2] 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[1]		✔
Post dashboard components to feeds	✔	✔
Follow dashboards	✔	✔

Feature	Lightning Experience	Salesforce Classic
Visualforce components		✔

[1] 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	✔	
View records visually (Kanban)	✔	
Create and edit lists	✔	✔
Sortable columns	✔	✔
Resizable columns	✔	✔
Sharing Settings[1]	✔	✔
Filter logic	✔	✔
Inline editing	✔	✔

[1] 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	✔	✔
Customizable Forecasting		✔
Territory Management		✔
Salesforce Communities[1]	✔	✔

Feature	Lightning Experience	Salesforce Classic
Partner Portals		✔
Work.com		✔

[1] Switch to Salesforce Classic for creating or disabling community users, logging in as a community user, and using delegated administration.

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. But some customizations aren't useful or relevant in Lightning Experience. And some 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. In Lightning Experience, when you create a new Lightning app or upgrade a Classic app, 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

> 📝 **Note:** Although your users can't customize tabs, they can personalize their Lightning Experience navigation with favorites. Like bookmarks in a web browser, favorites allow quick access to important records, lists, groups, dashboards, and other frequently used pages in Salesforce.

Page Layouts, Compact Layouts, and Utility Bars

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, record types, and profiles.

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. Check out Lightning Alternatives to JavaScript Buttons in Trailhead for a great list of Lightning-friendly solutions for your JavaScript button use cases.

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. Visualforce is supported 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 Develop for 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 Develop for 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 "Understand 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.

Evaluate Your Org in Lightning Experience

Now that you understand the value of Lightning Experience and how it compares to what you're used to in Salesforce Classic, let's get more specific to you. With the help of several handy tools in the Lightning Experience Migration Assistant, you can personally evaluate how your production org works in Lightning Experience. Run the Readiness Check and get a report of potential issues. Preview your org in the new interface to see first-hand how things look. Then use the results of your analysis to help define the technical solutions and other development requirements you'll want to include in your rollout plan.

Currently, Lightning Experience is geared toward sales teams, so some features from other Clouds aren't available yet. Although Lightning Experience will continue 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 until you know that the new experience provides what you need.

Check Your Lightning Experience Readiness

Curious about what you need to do to get your org ready for Lightning Experience? Worried it's going to be a lot of work? Run the Lightning Experience Readiness Check to find out. You'll get a personalized Readiness Report that shows what needs to be addressed, plus a free consultation with a Lightning expert for advice on your next steps. You may be delighted to learn you're ready for Lightning Experience now. But even if there's work to do, these findings are a valuable resource for informing your rollout plan.

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. The Preview is also a great way to evaluate features and customizations that aren't evaluated by the Lightning Experience Readiness Check.

Check Your Lightning Experience Readiness

Curious about what you need to do to get your org ready for Lightning Experience? Worried it's going to be a lot of work? Run the Lightning Experience Readiness Check to find out. You'll get a personalized Readiness Report that shows what needs to be addressed, plus a free consultation with a Lightning expert for advice on your next steps. You may be delighted to learn you're ready for Lightning Experience now. But even if there's work to do, these findings are a valuable resource for informing your rollout plan.

> 💡 **Tip:** We're continually updating and expanding the scope of what the Readiness Check evaluates so we recommend re-running the tool occasionally.

EDITIONS

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

USER PERMISSIONS

To run the Lightning Experience Readiness Check
- Customize Application

  AND

  Modify All Data

To get the email with your Readiness Report
- In Salesforce Setup, Email Deliverability set to the access level All email

Who Can Run the Lightning Experience Readiness Check

Learn which environments support Lightning Experience Readiness Check.

What Does the Lightning Experience Readiness Check Evaluate?

Before you kick off your evaluation, see which features and customizations the Readiness Check evaluates. That way you know what you've got covered and which features and customizations you need to preview for yourself.

Kick Off the Lightning Experience Readiness Check

To evaluate whether some of the key features and customizations you've implemented are ready for Lightning Experience, kick off the Readiness Check.

Review and Act on the Lightning Experience Readiness Report

The Readiness Check emails you a personalized Readiness Report, with advice and recommendations about what you need to do to get ready for Lightning Experience. We also email you details about signing up for a free 30-minute consultation with a Lightning expert, where you'll go over the results in your report. Then you'll be ready to get your rollout plan in order. Use the findings in your report to identify the work that should happen before you launch a pilot, updates that can happen in a later phase of your rollout, and the users who are good candidates for your pilot group.

Who Can Run the Lightning Experience Readiness Check

Learn which environments support Lightning Experience Readiness Check.

The Lightning Experience Readiness Check is available in sandbox and production environments.

The feature is also available for customers with certain IP address restrictions. Whitelist the following IP addresses for users who run Readiness Check in your organization:

- 52.2.2.209
- 52.203.195.34
- 52.200.207.131
- 52.72.119.132

For Enterprise, Performance, Unlimited, and Developer Editions, whitelist these IP addresses on those users' profiles. Users who aren't assigned to those profiles can't access Readiness Check.

For Professional Edition, set the Login IP Range. From Setup, enter `Session Settings` in the Quick Find box, then select **Session Settings**.

What Does the Lightning Experience Readiness Check Evaluate?

Before you kick off your evaluation, see which features and customizations the Readiness Check evaluates. That way you know what you've got covered and which features and customizations you need to preview for yourself.

> 📝 **Note:** The Readiness Check and the Readiness Report are available in English only.
>
> We recommend that you manually review features and customizations not covered by the Readiness Check before rolling out Lightning Experience to your users. The Lightning Experience Preview tool is a great way to get a first-hand look at anything not evaluated by the Readiness Check.

Here's what the Readiness Check evaluates.

- User profiles
- Tabs and objects:
    - Documents
    - Territory Management
    - Enterprise Territory Management
- Sales Cloud related lists:
    - Account Contact Roles
    - Account Partners
    - Campaign Members
    - Campaign Influence
    - Contact Hierarchy
    - Opportunity Partners
- Custom buttons and links:
    - JavaScript
    - URLs that link to other pages in Salesforce

- Home page and sidebar components
- Email templates
- Lookup filters
- Cases
- Third-party computer-telephony integration (CTI)
- Salesforce Console (Sales and Service)
- Omni-Channel
- Live Agent
- SOS
- Service Contracts
- Entitlements
- Solutions
- AppExchange packages
- Hard-coded URLs and My Domain
- Visualforce overrides
- Sharing buttons
- Data.com

SEE ALSO:

Kick Off the Lightning Experience Readiness Check

To evaluate whether some of the key features and customizations you've implemented are ready for Lightning Experience, kick off the Readiness Check.

1. From Setup in Salesforce Classic, click **Get Started** in the Lightning Experience Migration Assistant tile at the top of the menu (1).

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

2. On the Check Readiness tab in the Migration Assistant (2), click **Check Readiness** (3).

EDITIONS

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

USER PERMISSIONS

To run the Lightning Experience Readiness Check
- Customize Application

  AND

  Modify All Data

To get the email with your Readiness Report
- In Salesforce Setup, Email Deliverability set to the access level All email
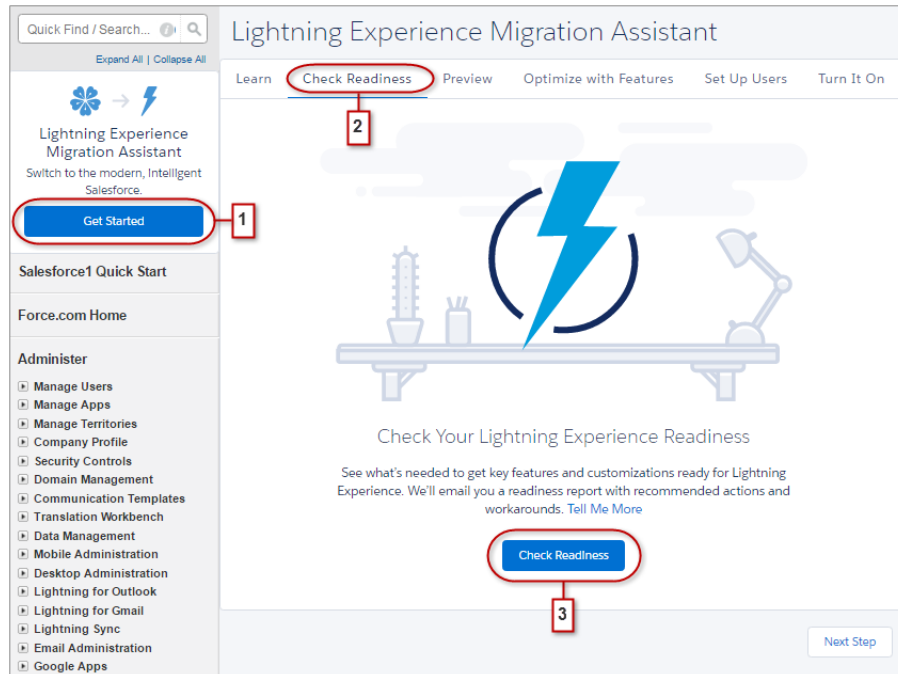
After you kick off the readiness check, Salesforce generates a PDF readiness report and emails it to you. Salesforce also saves the report to Salesforce Files.

Review your readiness report to learn about the modifications you need to make to get ready for Lightning Experience.

SEE ALSO:

Review and Act on the Lightning Experience Readiness Report

The Readiness Check emails you a personalized Readiness Report, with advice and recommendations about what you need to do to get ready for Lightning Experience. We also email you details about signing up for a free 30-minute consultation with a Lightning expert, where you'll go over the results in your report. Then you'll be ready to get your rollout plan in order. Use the findings in your report to identify the work that should happen before you launch a pilot, updates that can happen in a later phase of your rollout, and the users who are good candidates for your pilot group.

After you kick off the Lightning Experience Readiness Check , we email a PDF Readiness Report to you. Salesforce also saves the report to Salesforce Files.

First, review your report. Then take the recommended actions to address any features or customizations we've identified that are unsupported in Lightning Experience. If you like, you can set up a free consultation with a Lightning Experience expert to review your report and ask questions about what your next steps should be.

When you're ready, you can also use your report to help develop your rollout strategy. Let's break down how that might work.

We recommend that you roll out Lightning Experience incrementally, starting with a small group of users who are ready to try a pilot of the new interface.

To find your first pilot group, make note of the features and customizations that the report identifies as the most Lightning-ready. Then identify small groups of users who work primarily with those features, and roll out Lightning Experience to those users first.

EDITIONS

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

Not sure which features individual users are working with? That's okay! You can also poll your users to see who relies on the features or customizations that the report identifies as unsupported. If you learn that users aren't working with those features, or only use them occasionally, you can feel confident migrating those users to Lightning Experience now.

And remember: If a frequently-used object doesn't appear as expected or a related list isn't available in Lightning Experience, you don't need to delay on adopting Lightning Experience. Lightning Experience users can easily switch back to Salesforce Classic via the Switcher in their profile menu. Some users don't mind working in Salesforce Classic occasionally.

Keep in mind that if your report tells you that the features that your sales team needs are available in Lightning Experience and working correctly, you still might want to release it to a small group first to verify that the new experience works well. Then, those users can become Lightning Experience advocates for the rest of the company.

For an overview of our rollout recommendations, see Develop Your Lightning Experience Rollout Strategy.

Don't forget that we're making improvements to Lightning Experience and the readiness check all the time. If your readiness report shows that a feature or customization isn't supported, and you know your users really need it, just check back with us later to see where that feature stands with Lightning Experience. The easiest way to check availability is to run the readiness check again. Or, read the Salesforce Release Notes and go through the latest Lightning Experience Basics Trail.

SEE ALSO:

> Kick Off the Lightning Experience Readiness Check
>
> What Does the Lightning Experience Readiness Check Evaluate?

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. The Preview is also a great way to evaluate features and customizations that aren't evaluated by the Lightning Experience Readiness Check.

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, click **Get Started** in the Lightning Experience Migration Assistant tile at the top of the menu. On the Preview tab in the Migration Assistant, click **Preview** to dive in.

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

Roll Out 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.

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.

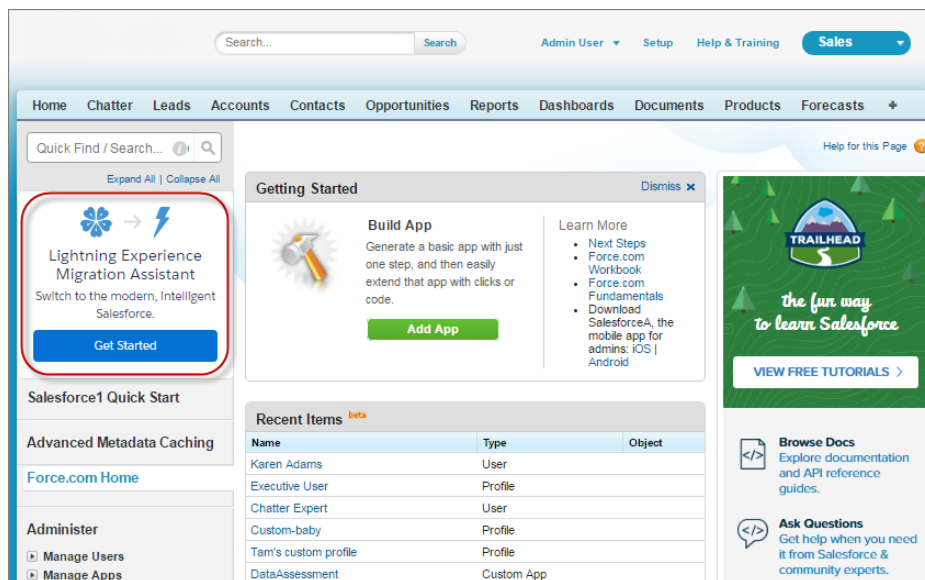| **Discover**	• Learn about Lightning Experience
	• Identify stakeholders and an executive sponsor
	• Educate your company with presentations and demos
	• Review Compare Lightning Experience and Salesforce Classic and Lightning Experience Considerations
	• Conduct a gap analysis to confirm you're getting what you need. Kick off the Lightning Readiness Check to evaluate of some of your features and customizations.
Roll Out	• Identify users for a pilot of Lightning Experience. Use the Lightning Experience Readiness Report to develop your strategy.
	• 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!
Optimize	• 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

Tip: 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 **Get Started** in the Migration Assistant tile at the top of the menu.

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 optimized to help your sales reps sell faster and help your service reps support customers faster.

Set Up Users for Lightning Experience

Next up, make sure that the right users can access Lightning Experience when it's turned on. You can fine-tune access with permission sets and custom profiles. Meaning you can do a phased rollout, starting with a small pilot group or a specific team of users who can benefit from the new interface. Or go for it and set your entire organization loose. You can also control who immediately switches to the new interface, who stays in Salesforce Classic until they switch themselves, and who can't switch back to the classic interface. The power is yours.

Turn on Lightning Experience for Your Org

You've knocked off the "Discover" items and "Roll Out" 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

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 optimized to help your sales reps sell faster and help your service reps support customers faster.

EDITIONS

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

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.

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.

Path

Help your users adopt your company's processes to work more efficiently or close more deals. Set up a process based on an object's status or stage. Add guidance for success at each step in the process.

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

Next up, make sure that the right users can access Lightning Experience when it's turned on. You can fine-tune access with permission sets and custom profiles. Meaning you can do a phased rollout, starting with a small pilot group or a specific team of users who can benefit from the new interface. Or go for it and set your entire organization loose. You can also control who immediately switches to the new interface, who stays in Salesforce Classic until they switch themselves, and who can't switch back to the classic interface. 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" in Group Edition—all your users get access when Lightning Experience is enabled. But you can control who switches immediately to the new interface and who remains in the classic interface until they're ready to switch themselves.

Decide Who Can Use Lightning Experience

Users require the Lightning Experience User permission to access Lightning Experience. By default, this permission is automatically enabled for all users with a standard Salesforce profile. Custom profiles don't automatically include the permission.

So first things first, do you have users with standard profiles who you don't want accessing Lightning Experience yet? Move these users to custom profiles that don't include the Lightning Experience User permission.

For users assigned to custom profiles, decide who gets Lightning Experience access now and who you'll set up later. 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.

- Interested in rolling out Lightning Experience to everyone assigned 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 a Data Loader ninja, you can save time by updating many profiles at once. But remember, with great power comes great responsibility. Take care you don't inadvertently enable or disable other features.

If you're limiting Lightning Experience to a subset of your users, try to 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 Considerations for Switching Between Lightning Experience and Salesforce Classic for more details.

Decide Who Immediately Switches to Lightning Experience and Who Can't Switch Back to Salesforce Classic

You obviously want the users you've set up for Lightning Experience to start working in the new interface sooner than later. There are several options you can use to encourage adoption of Lightning Experience. Choose what's right for each user.

- By default, Lightning Experience-enabled users stay in Salesforce Classic and automatically get the Switcher, so they can switch themselves when they're ready. This may be the best option if you want to enable Lightning Experience now but your team isn't fully trained yet or it's not a good time to introduce a major change.

- You can set it up so the users who are trained and ready to go immediately get Lightning Experience as their default experience. These users also get the Switcher, so they can return to Salesforce Classic as needed. See Switch Users to Lightning Experience.

- When you're ready for users to dive into Lightning Experience without looking back, you can move them to the new interface without the option to switch back to Salesforce Classic. See Make Lightning Experience the Only Experience.

> **Note:** After Lightning Experience is enabled, any new users you add automatically get Lightning Experience as their default experience if they also have the Lightning Experience User permission—whether from a standard profile or a custom profile that includes the user permission. New users also get the Switcher so they can access Salesforce Classic, unless you opt to restrict them to Lightning Experience.

SEE ALSO:

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

Considerations for Switching Between Lightning Experience and Salesforce Classic

Switch Users to Lightning Experience

Give users who are trained and ready to work in Lightning Experience a head start. Use the Switch Users tool in the Lightning Experience Migration Assistant to assign the new interface as a user's default experience. When Lightning Experience is enabled, selected users are automatically switched to the new interface.

1. From Setup in Salesforce Classic, click **Get Started** in the Lightning Experience Migration Assistant tile at the top of the menu.

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

2. On the Set Up Users tab in the Migration Assistant, click **Switch Users**.

   You see at a glance which users have permission to access Lightning Experience and are eligible to switch, which users are already using Lightning Experience as their default environment, and which users can't be switched because they don't have the Lightning Experience User permission yet.

3. Click the ✦ button next to the users you want to switch.

4. Save your selections.

You can't use this tool to switch users back to Salesforce Classic. But users can switch themselves back as needed, using the Switcher in their profile menus.

> **Note:** Want to prevent users from switching back to Salesforce Classic? See Make Lightning Experience the Only 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

Make Lightning Experience the Only Experience

Ready for your users to go all in on Lightning Experience? Keep them in Lightning Experience by hiding the option to switch back to Salesforce Classic.

When you enable Lightning Experience, users with the Lightning Experience User permission automatically get the Switcher. The Switcher lets users move back and forth between the new and classic Salesforce interfaces. But you can remove the Switcher, for some or all of your users.

- From Setup, enable the Hide Option to Switch to Salesforce Classic permission in profiles and permission sets.
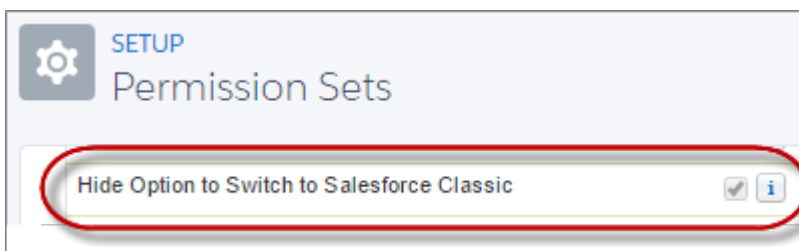
When you enable this permission, users with the affected profiles or permission sets see Lightning Experience the next time they log in to Salesforce. And they no longer see the **Switch to Salesforce Classic** link in their profile menus.

SEE ALSO:

Gotchas If You Don't Allow Users to Switch Between Lightning Experience and Salesforce Classic

Turn on Lightning Experience for Your Org

You've knocked off the "Discover" items and "Roll Out" 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.

1. From Setup in Salesforce Classic, click **Get Started** in the Migration Assistant tile at the top of the menu.
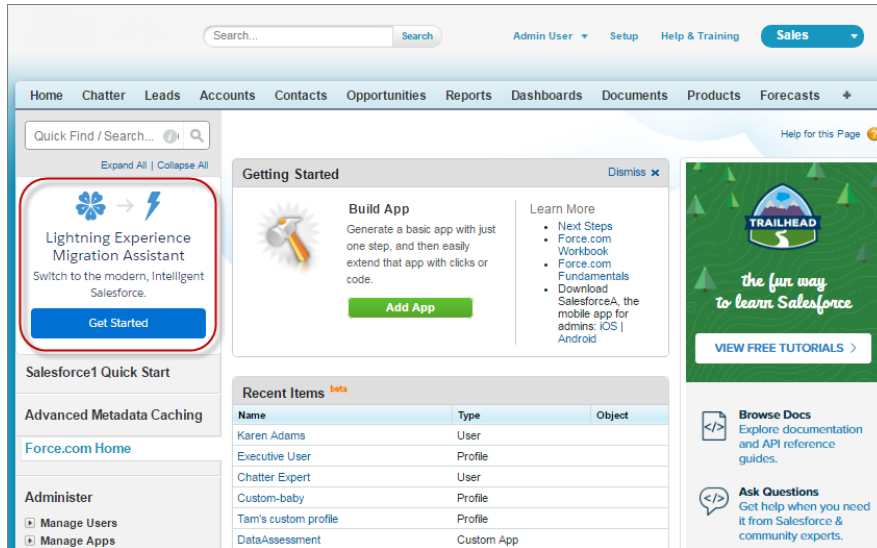
2. On the Turn It On tab in the Migration Assistant, click the button to switch it to **Enabled**.
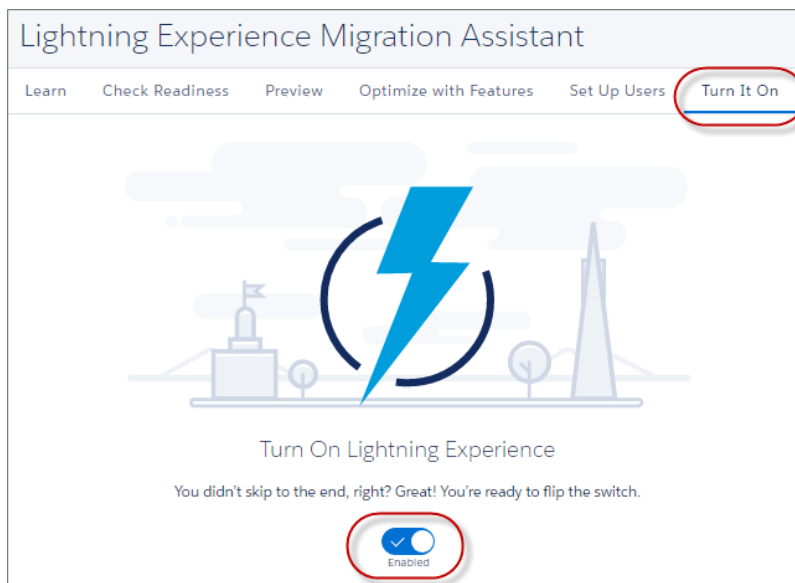
That's it! The users you've enabled and set up to immediately switch to the new interface automatically start enjoying Lightning Experience when their current session refreshes or when they log in. The users you've enabled but opted to leave in Salesforce Classic now have access to the Switcher and can 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.

1. From Setup in Salesforce Classic, click **Get Started** in the Lightning Experience Migration Assistant tile at the top of the menu. From Setup in Lightning Experience, enter `Lightning` in the Quick Find box, then select **Lightning Experience**.

2. On the Turn It On tab in the Migration Assistant, click the button to set it to **Disabled**.

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.

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 Actions and Buttons in Lightning Experience

Salesforce Classic displays actions in the Chatter publisher, and buttons on a record's details page. Lightning Experience blurs the distinction between these elements. It 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 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 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

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.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
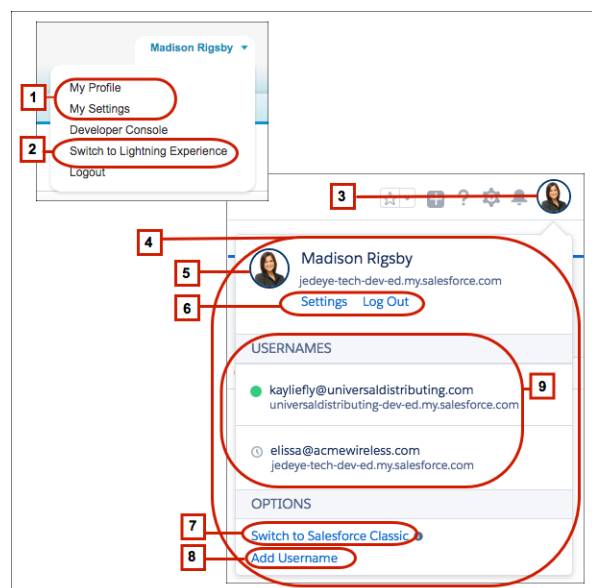
In Salesforce Classic, click your username to find links to your profile and personal settings (**1**). To get to your profile in Lightning Experience, click your profile picture (**3**) to open the Switcher (**4**). Then click your profile picture again to access your profile (**5**). Click **Settings** (**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.
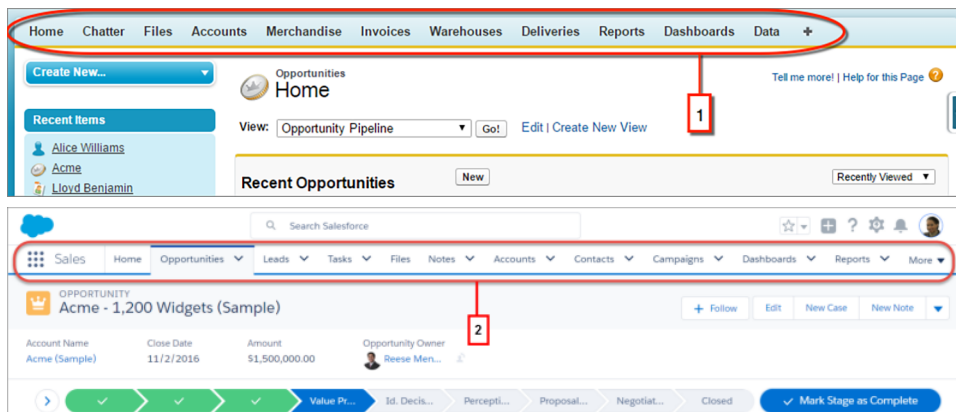
Use the App Launcher to open apps in both Salesforce Classic (3) and Lightning Experience. In Lightning Experience, the App Launcher is always accessible in the navigation bar (4) and shows your custom apps with custom logos, colors, and descriptions (5). If you're looking for an item that's not in your 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).
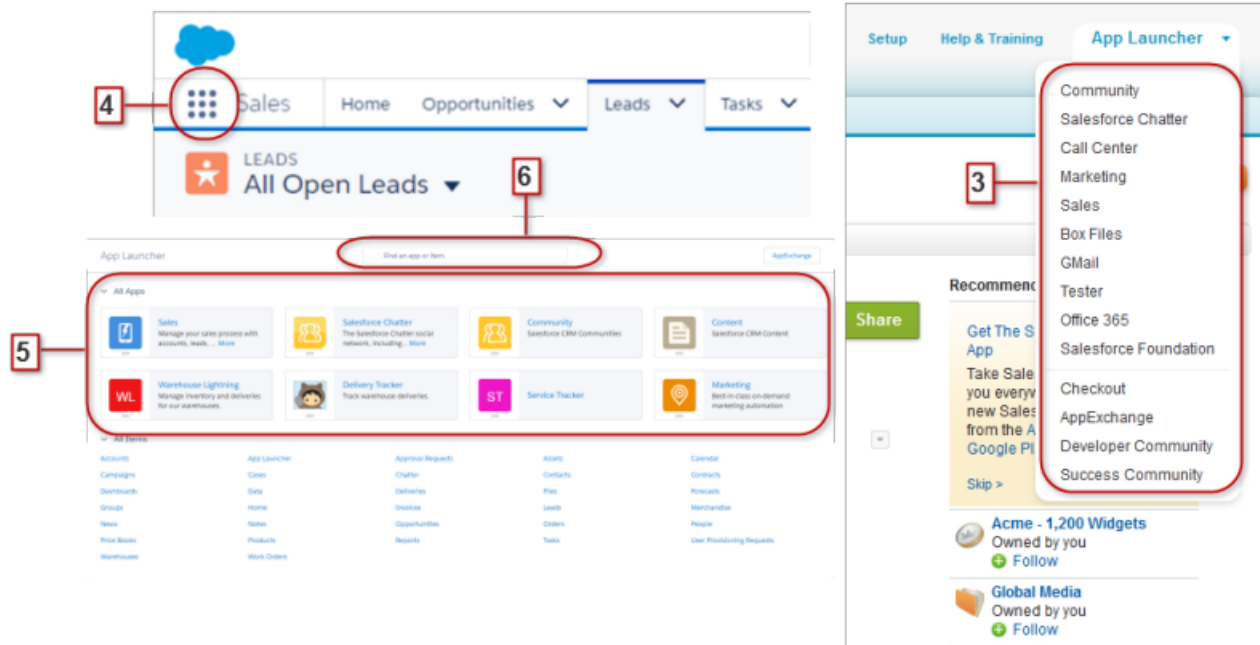
Find List Views in Lightning Experience

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.

- 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.

- 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 Actions and Buttons in Lightning Experience

Salesforce Classic displays actions in the Chatter publisher, and buttons on a record's details page. Lightning Experience blurs the distinction between these elements. It intermingles actions and buttons, locating them in different areas based on function.
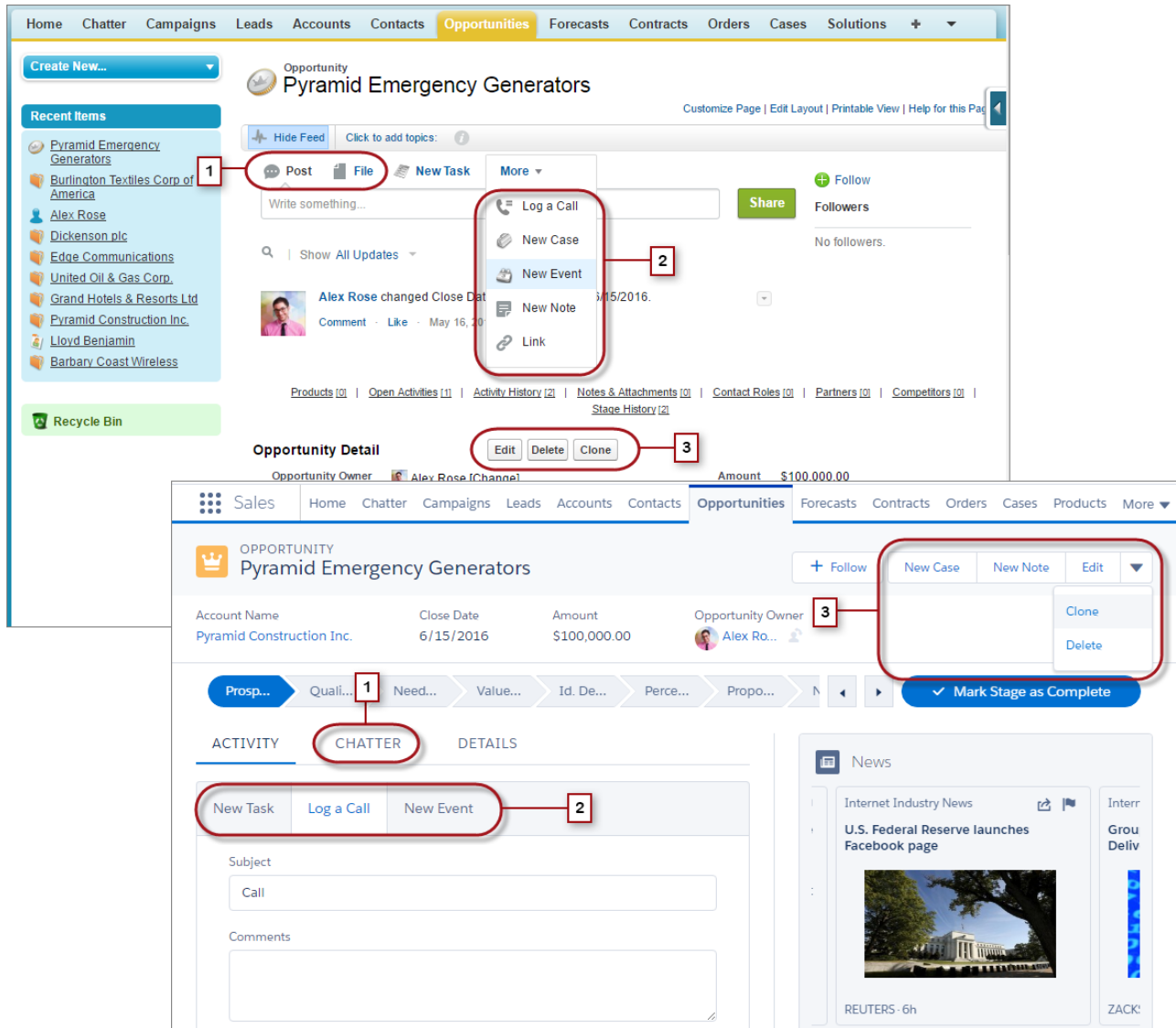
- The Post and Poll standard Chatter actions (1) appear in the composer on the Chatter tab in Lightning Experience. Other standard actions like Thanks and Links, however, aren't available in the new interface.

- 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 take actions that aren't related to the current record.

- Standard and supported custom buttons (3) on an object's page layout—including the Edit button—appear in the action menu. Other global and object-specific actions on the page layout, including Visualforce and Force.com Canvas actions, also appear in the menu.

- As in Salesforce Classic, custom links are included with the record's details. Click the Details tab to find them.

SEE ALSO:

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.

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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.

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.
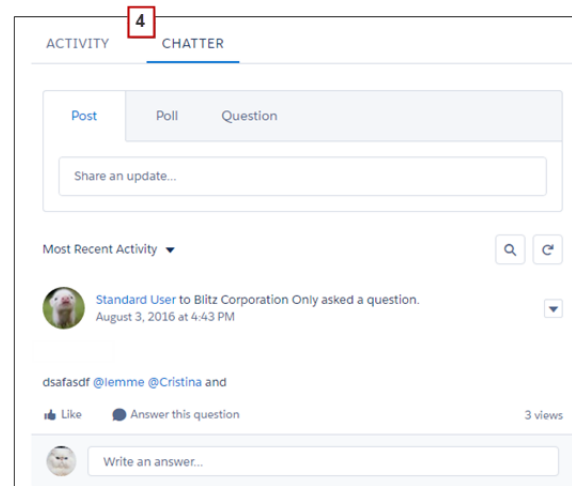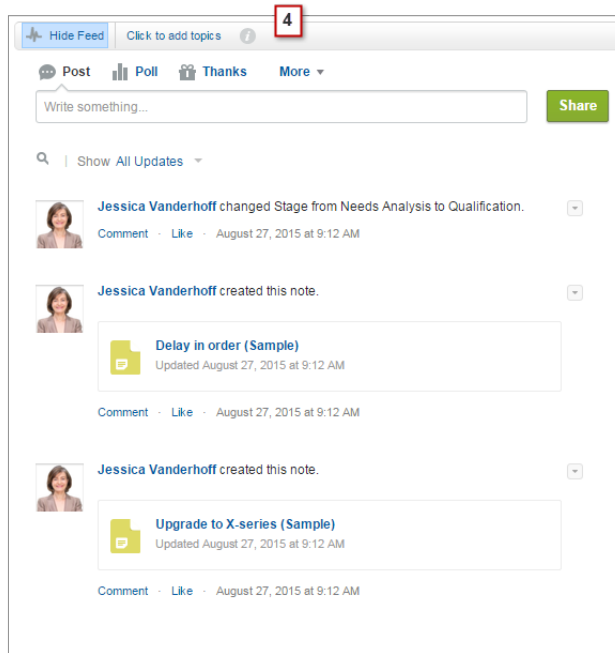
Work with Chatter Feeds

You can change the main Chatter feed to show a particular subset of posts (1). Like Salesforce Classic, use the tabs on the left side of the Chatter tab to change your feed view in Lightning Experience. The What I Follow feed remains the default feed in most cases. If you're following fewer than 10 things, though, the Company Highlights feed becomes your default. Company Highlights shows you the most active posts across your organization. You can use it to find more things to follow. Once you follow more than 10, your default feed changes to What I Follow.
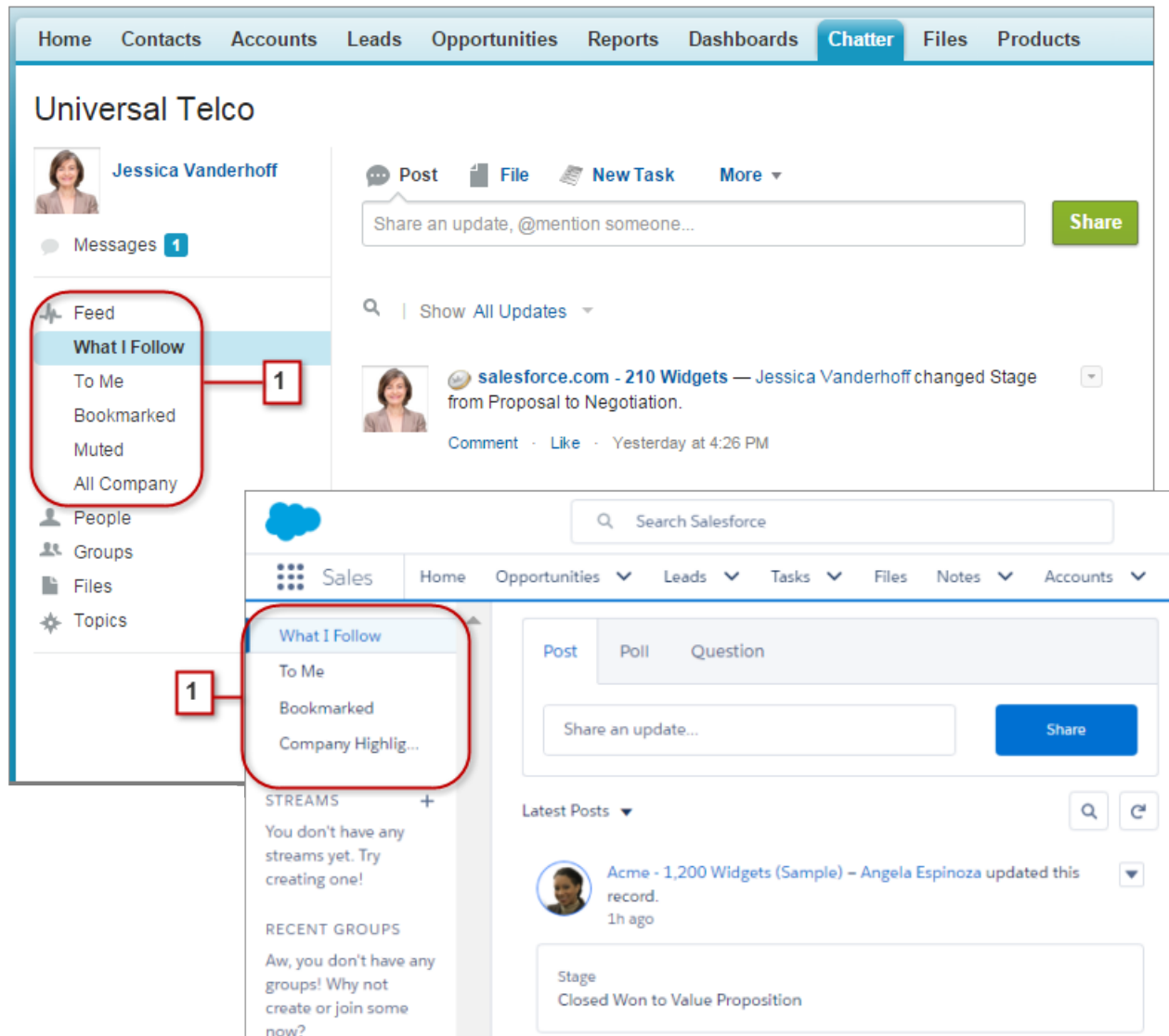
Feeds in Lightning Experience include many of the options that are available in Salesforce Classic and some that aren't.

- 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. In Lightning Experience, you can filter the What I Follow feed by **All Updates** or **Fewer Updates**. **All Updates** show you updates for all the feeds you follow. **Fewer Updates** omits Feed Tracked Changes, which are automatic updates that report on changes to tracked fields. Group and profile feeds also offer an array of useful filters.

- Refresh the feed to see up-to-date information. Group feeds in Lightning Experience are live and don't usually require a manual refresh. Comments are live everywhere, not just in groups.

- Locate information in a specific feed with feed search. In Lightning Experience, feed global search results provide the **Top Post** filtering option for narrowing results to what's most relevant to you.

- Tag posts with topics in both interfaces.

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.
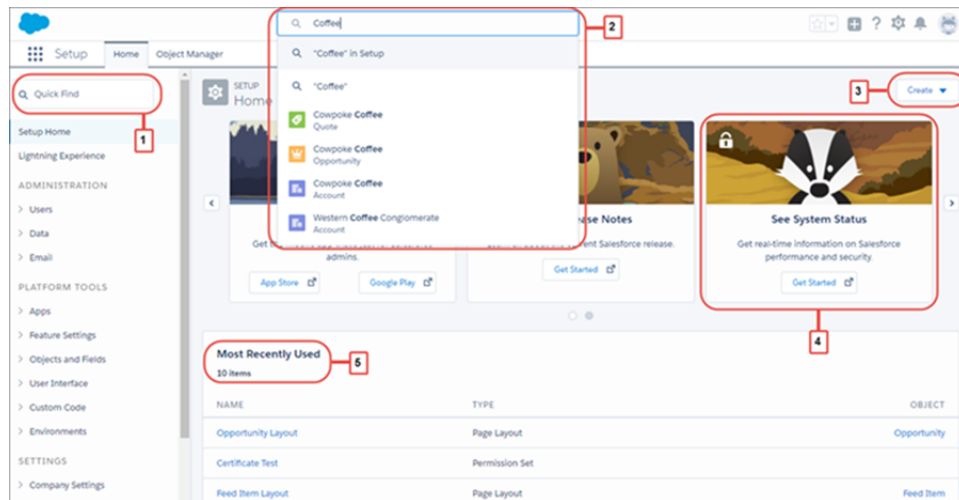
- **Quick Find** (**1**) is your tool for getting where you need to go quickly. Enter a search term in the Quick Find box to filter the list of pages by what you've entered. Find what you're looking for faster than you would by browsing through the Setup pages.

- 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 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.

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When you click a video link (), a video player appears, allowing you to watch without leaving Salesforce.
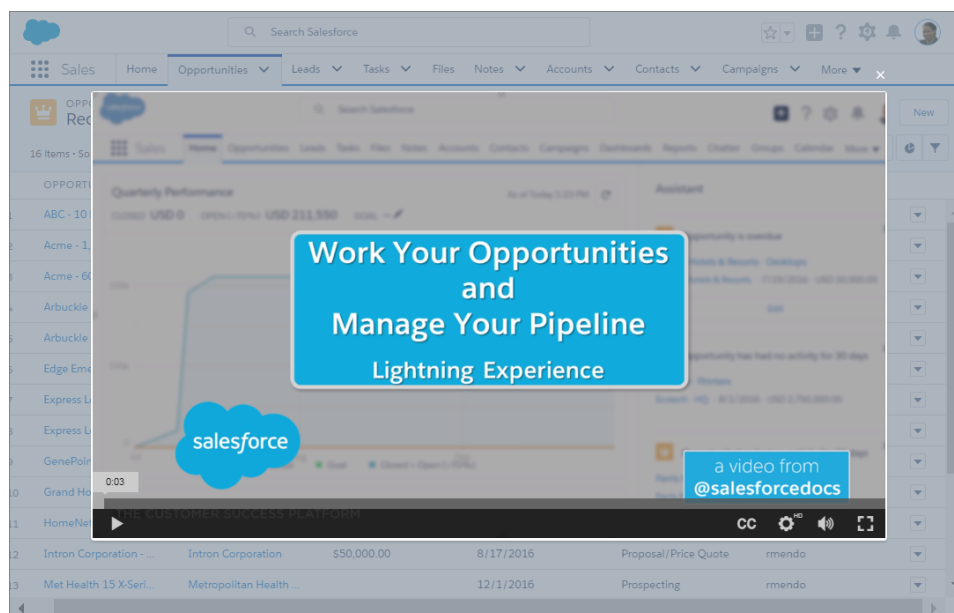
Walkthrough links (⊟) take you to the first step of the walkthrough in your organization. Help, developer guide, and PDF links open in a new browser tab.

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

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.

Considerations for Switching Between Lightning Experience and Salesforce Classic

When you enable users for Lightning Experience, you have options for allowing access between Lightning Experience and Salesforce Classic. Keep these considerations in mind when you choose how your users get Lightning Experience.

What are the Gaps Between Lightning Experience and Salesforce Classic

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. 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 if 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

Considerations for Switching Between Lightning Experience and Salesforce Classic

When you enable users for Lightning Experience, you have options for allowing access between Lightning Experience and Salesforce Classic. Keep these considerations in mind when you choose how your users get Lightning Experience.

Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

Switching between Lightning Experience and Salesforce Classic affects the underlying URL routing logic and can lead to some unexpected results when links are resolved. There can be snags with bookmarks and sharing links in emails or Chatter posts—especially if only a subset of your users is enabled for Lightning Experience.

Gotchas If You Don't Allow Users to Switch Between Lightning Experience and Salesforce Classic

If you want some or all of your users to go all in on Lightning Experience, you can remove the Switcher to keep them in the new interface. Here's what to expect when you enable the Hide Option to Switch to Salesforce Classic permission.

Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

Switching between Lightning Experience and Salesforce Classic affects the underlying URL routing logic and can lead to some unexpected results when links are resolved. There can be snags with bookmarks and sharing links in emails or Chatter posts—especially if only a subset of your users is enabled for Lightning Experience.

The Lightning Experience user permission and the user's default experience affects the way links resolve for each user in your org. A user's default experience isn't static.

- When you enable users for Lightning Experience, their default experience is Salesforce Classic.

- If you switch any of these users to the new interface—either from the Switch User tool in the Lightning Experience Migration Assistant or by assigning the Hide Option to Switch to Salesforce Classic permission—their default experience resets to Lightning Experience.

- Any time someone uses the Switcher, that user's default experience resets again to the current environment.

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.
		To share a Lightning Experience link with other users, make sure that they are logged in to Salesforce first. Otherwise, the link prompts them to log in and then directs them to the home page.

User Has the "Lightning Experience User" Permission?	User's Default Experience	Where Links Open
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 when users share Lightning Experience links with Salesforce Classic users. To minimize link issues, enable the new interface for all users who work closely together. And train your Lightning Experience users to understand how links and bookmarks work across the two experiences.

To avoid link issues altogether, move your entire org to Lightning Experience and disable the Switcher for everyone.

SEE ALSO:

[Saying Hello to Lightning Experience Doesn't Have to Mean Saying Goodbye to Salesforce Classic](#)

Gotchas If You Don't Allow Users to Switch Between Lightning Experience and Salesforce Classic

If you want some or all of your users to go all in on Lightning Experience, you can remove the Switcher to keep them in the new interface. Here's what to expect when you enable the Hide Option to Switch to Salesforce Classic permission.

- If users access features that aren't supported in Lightning Experience, they switch to Salesforce Classic, even though the permission is enabled. They are in Salesforce Classic only as long as they're using a feature that's not available in Lightning Experience. If they access a feature that's available in Lightning Experience, they switch back.

- The permission doesn't affect the full site link in the Salesforce1 mobile browser app. Salesforce1 users always switch to the Salesforce Classic version of the full site, regardless of the interface they see on their desktop devices.

- A user's experience preference isn't relevant when the Hide Option to Switch to Salesforce Classic permission is enabled. If the Hide Option to Switch to Salesforce Classic permission is disabled, the user's last experience preference is used.

- Users with the system administrator profile or assigned one of the following permissions see the Switch to Salesforce Classic link even when the Hide Option to Switch to Salesforce Classic permission is enabled: Customize Application, Modify All Data, or Manage Users.

SEE ALSO:

[Make Lightning Experience the Only Experience](#)

What are the Gaps Between Lightning Experience and Salesforce Classic

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. Features not supported yet in the new interface are still available to your users—they can easily switch to Salesforce Classic and keep working.

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

Sales Features: What's Different or Not in Lightning Experience

Productivity Features: What's Different or Not Available in Lightning Experience

Customer Service Features: What's Different or Not Available in Lightning Experience

Reports and Dashboards: What's Different or Not Available in Lightning Experience

Files and Content: What's Different or Not Available in Lightning Experience

Chatter: What's Different or Not Available in Lightning Experience

Communities: What's Different or Not Available in Lightning Experience

Navigation and Actions: What's Different or Not Available in Lightning Experience

Search: What's Different or Not Available in Lightning Experience

Org Setup: What's Different or Not Available in Lightning Experience

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

Process Automation: What's Different or Not Available in Lightning Experience

Security: What's Different or Not Available in Lightning Experience

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

Programmatic Customization: What's Different or Not Available in Lightning Experience

Apps and Packaging: What's Different or Not Available in Lightning Experience

SEE ALSO:

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

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

Learn what 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.

- Account
- Activities
- Asset
- Asset Relationships
- Calendar
- Campaign

- Campaign Members
- Case
- Chatter
- Contact
- Contact Versions
- Contracts
- Dashboards
- Duplicate Record Items
- Duplicate Record Sets
- Email Messages
- Event
- Group
- Home
- Lead
- Notes
- Opportunities
- Opportunity Products
- Order
- Order Products
- Price Books
- Price Book Entries
- Products
- Quotes (Creating quotes from the Quotes home page isn't supported.)
- Reports
- Social Personas
- Social Posts
- Tasks
- Users
- Work Orders
- Work Order Line Items
- 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.
- Lookup fields in Salesforce Classic show record names regardless of sharing permissions, so it's possible for users to see the names 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.
- In Lightning Experience, page layouts support up to 35 lookup fields. In Salesforce Classic, page layouts support up to 40 lookup fields.

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.

- 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.

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 popup dialog box. You add filters to customize your list with a panel that slides out on the right side of the page.

- You can restrict list views only by selecting **All** or **My**. Other options, such as restricting by queue, campaign, my account teams, my opportunity teams, 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 2,000 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 inline edit list views that contain dependent picklist fields. However, you can't edit the dependent picklist field, only the other fields in the list view.

- 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 view is not available from the Recently Viewed list view. Users must select another list view before they can switch to the Kanban view.

- The Kanban view displays a maximum of 200 cards.

- Columns aren't created from inactive picklist fields. Records associated with inactive picklist values aren't displayed in the Kanban view.

- Summaries can only be created for numeric and currency fields that are not roll up summary or formula fields

- Records are only displayed if the field selected for **Group By** is included on the page layout.

- If a record has a null value for the **Group By** field, it won't appear in the Kanban view.

- You can't group records by the `Currency` field.

- Subtabs are created for record types if the **Group By** field is included on the record type's page layout, and the record type has records associated with it.

- Drag-and-drop functionality isn't supported for touchscreens.

- Mass actions can't be performed in the Kanban view.

Opportunities

- Users receive alerts on opportunities with overdue tasks, no open activities, or no activity in the last 30 days. The alerts aren't customizable.

- Opportunities can't be grouped by the `Forecast Category` field.

Leads

- Leads can't be converted in the Kanban view.

- Columns aren't created for any Lead Status value with a state of `Converted`.

Contracts

- Contracts can't be activated in the Kanban view.

- A column isn't created for the standard Contract Status of `Activated`.

- Contracts can't be grouped by the `Owner Expiration Notice` field.

Knowledge

- Knowledge articles can't be grouped by owner.

Work with Data

Create and Edit Data

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

Print Data

These features aren't available in Lightning Experience.

- Printing a page

- Generating a PDF

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 the navigation bar and object home pages
- The Calendar shortcut; access the Calendar from the navigation bar
- 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:

Sales Features: What's Different or 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 within the News tab on accounts, contact and, and lead record pages.

Path for Opportunities, Leads, Quotes, Contracts, Orders, and Custom Objects

- You can include a maximum of five key fields and 1,000 characters of rich text in each step in a path.
- You can't require different fields in different steps using the page layout. You can, however, set up validation rules based on the path step.
- Dependent fields are ignored when moving an opportunity stage using Path.
- If you set fields to the Read-Only or Required permissions in page layouts, Path doesn't enforce those permissions.
- Although not a limitation, keep in mind that deleting a record type that has a corresponding path also deletes the path.
- Validation rules appear as page-level messages, even if you configure the rules to appear near the fields.
- For lead paths, we recommend that you place Unqualified statuses at the beginning of the paths.
- Images can't be included in packages for Path.
- Custom values in standard picklist fields aren't packagable.

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.

- 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. Also, the contact record doesn't get the account's phone and fax numbers.

- If you use person accounts, switch back to Salesforce Classic to add the Related Accounts and Related Contacts related lists to the person account page layouts your reps use.

Features Not Available in Lightning Experience

- Customizable Forecasts (Collaborative Forecasts is available in Lightning Experience.)

- Divisions

- Mass Division Transfer

Accounts

Person Accounts

- Some person accounts functionality isn't accessible from Setup in Lightning Experience. Switch to Salesforce Classic to set up and configure record types, page layouts, and compact layouts for person accounts.

- 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 the `Contact Name` the `Account Name` 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.

- The Assets related list on person account records only shows assets that have the person account listed in the **Account Name** field. If the person account is listed in the **Contact Name** field, the asset doesn't appear in the related list.

- You can't merge person accounts in Lightning Experience. Switch back to Salesforce Classic to merge up to three person 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 the contact organization-wide default is set to Controlled by Parent, the Contact Access field is displayed even though it always takes its value from the Account Access field.

- When a user doesn't have access to a particular account, the Account Access field is displayed even though it always takes its value from the Account organization-wide default. If the account organization-wide default is set to Private, the Account Access is Read Only.

- Any user with edit access to an account can edit the account's team members, but only changes to the Team Role field are saved.

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 partners related list
- The Account Territories related list on account records
- HTML Email Status related list on person account records
- Contact roles on accounts (use Contacts to Multiple Accounts instead)
- The **Manager External Account** button
- Account Home reports and tools

Campaigns

Features Not Available in Lightning Experience

- Campaign Influence 1.0 (Customizable Campaign Influence is available.)
- Add leads, contacts, or person accounts to campaigns from reports

Collaborative Forecasts

Features Not Available in Lightning Experience

- Collaborative Forecasts isn't accessible from Setup. Switch to Salesforce Classic to set up and configure Collaborative Forecasts.
- On the forecasts page:
  - Opportunity split details don't appear in the opportunities summary.
  - The processing indicator isn't available.
  - You can't adjust the column width.
  - Quota attainment information isn't available.
  - "Jump to" isn't available.
  - Owner adjustment of product family forecasts isn't available.

Contacts

When creating a contact with an associated account, the contact's mailing address isn't populated with the account's billing address unless the contact is created from the account's Contact related list.

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 Roles on Accounts
- Contact Roles on Cases
- HTML Email Status related list (email tracking)

Contracts

Features Not Available in Lightning Experience

- Status picklist values aren't filtered based on a contract's status, so all status values appear in the picklist.

- The Draft and Activated status picklist values are required. To show users different labels for these picklist values, use Translation Workbench. You can also add other status picklist values.

Leads

Features Not Available in Lightning Experience

- Automatic opportunity name population for opportunities created during lead conversion.

- The Campaign lookup field is not available on the Lead page layout when creating leads.

- HTML Email Status related list (email tracking)

Differences Between Salesforce Classic and Lightning Experience

- When converting leads in Lightning Experience, newly created accounts are owned by the user who converts the lead, and not the lead owner.

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't edit more than 200 products at a time.

- Users can't edit dependent picklist fields or long text fields when adding or editing opportunity products.

- 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.

Contact Roles on Opportunities

Users can add only 1 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

Orders

Features Not Available in Lightning Experience

- When you clone an order with products, the products aren't cloned. Clone the order, and then add products as needed to the new order.
- You can't create reduction orders or select products to reduce.
- Status picklist values aren't filtered based on an order's status, so all status values appear in the picklist.
- The Draft and Activated status picklist values are required. To show users different labels for these picklist values, use Translation Workbench. You can also add other status picklist values.

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 orgs 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 orgs 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

To set up Enterprise Territory Management, create or update territory assignment models or rules, assign territories to records, or view territory assignments, switch toSalesforce Classic. However, access control on records managed by Enterprise Territory Management settings is respected in Lightning Experience.

Productivity Features: What's Different or Not Available in Lightning Experience

Learn what 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 actions in the Global Actions menu in Lightning Experience are pulled from global actions in the Salesforce1 and Lightning Experience Actions section on the global publisher layout.

Actions associated with objects that aren't supported in Lightning Experience don't display in the Global Actions menu. Also, the Global Actions menu doesn't support the standard Chatter actions Post, File, Poll, Link, Question, and Thanks.

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 Events

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

Follow-Up Events

Lightning Experience doesn't display the **Create Follow-Up Event** button for creating an event 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.

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 event attendees, event invitations, business hours settings, calendar views, sharing and ownership, public calendars and resource calendars, a limit on the number of calendar items displayed, and Cloud Scheduler.

Business Hours

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

Calendar Views

You can't hide weekends in the Calendar view.

Event Attendees

Lightning Experience offers event attendees, which are similar to event invitees in Salesforce Classic, with a few differences. Salesforce admins and users have to meet several conditions to view and edit event attendees from Lightning Experience.

- Admins have to set up Lightning Sync using OAuth 2.0 with the Sync Both Ways sync direction, so events are syncing between Salesforce and users' Microsoft® calendars.

- Admins have to add the Attendees field to the Event page layout or the quick actions layout for events.

- Users have to create the event or edit events from Lightning Experience or Salesforce1.

You can't view or edit event attendees from Lightning Experience if you're syncing events from Microsoft® Exchange to Salesforce only, or using Lightning Sync for Google.

The Attendees field isn't supported for Compact Layouts. However, adding attendees to the Event page layout let's your users view, invite, and remove attendees from events in Lightning Experience and Salesforce1.

Selecting Sync Both Ways limits some Salesforce Classic functionality. To learn more, see Lightning Sync Considerations in the Salesforce Help.

Event Invitations

Salesforce admins and users have to meet several conditions to send event invitations for Lightning Experience events.

- Admins have to set up Lightning Sync using OAuth 2.0 with the Sync Both Ways sync direction, so events are syncing between Salesforce and users' Microsoft® calendars.

- Admins have to add the Attendees field to the Event page layout or the quick actions layout for events.

- Users have to create or edit events from Lightning Experience or Salesforce1.

Invitations are emailed to event attendees from Microsoft Office 365®, and attendees can accept or decline event invitations from their Microsoft calendars only.

Event invitations aren't sent if you're syncing event and attendee information from Microsoft® Exchange to Salesforce only, or using Lightning Sync for Google.

Selecting the Lightning Sync direction "Sync Both Ways" limits some Salesforce Classic functionality. To learn more, see Lightning Sync Considerations in the Salesforce Help.

Microsoft® Outlook® Appointments

You can't create an Outlook appointment from a Salesforce event using the Add to Outlook button. However, if you're set up to sync events between Microsoft Office 365 and Salesforce using Lightning Sync, events you create and edit from Lightning Experience sync to Outlook automatically.

List View Filtering

No list views are available for filtering calendars based on the Events or Tasks objects. The list view shows all your tasks, open and closed, and all your events. 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

Overdue tasks appear in the Activity Timeline and the Tasks home. 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.

Tasks that Repeat Every Weekday

Users can't create recurring tasks with the "every weekday" frequency in Lightning Experience. We don't recommend editing tasks with this interval in Lightning Experience because the edit page doesn't show the current recurrence details.

To create or edit tasks that repeat every weekday, switch to Salesforce Classic.

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 give only View access to others. Notes doesn't support simultaneous editing. 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 and valid external email addresses.

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 isn't 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 Templates

Email templates in Lightning Experience support rich text and are sent as HTML.

Text, custom HTML, and letterhead email templates created in Salesforce Classic can be used in Lightning Experience. Visualforce email templates can only be used in Salesforce Classic. 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

The HTML Email Status report is available in Lightning Experience, but the HTML Email Status related list is not.

Email Templates and Communities

Users with community licenses can't create or update email templates. This affects both community licenses and portal licenses supported on communities.

Microsoft and Google Integration

Lightning Sync

You can't see attendees or send invitations for events if you're syncing events from Microsoft® Exchange to Salesforce only, or using Lightning Sync for Google.

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 Different or Not Available in Lightning Experience

Learn what to expect if your organization uses customer service tools. Some service-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.

- Cases are supported, but they don't have full parity with what's available in Salesforce Classic.
- Salesforce Console is supported, but it doesn'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.
- 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.

Salesforce Console for Service

📝 **Note:** Lightning console apps don't yet have full parity with Salesforce Classic console apps. For example, some features in Salesforce Classic console apps, such as push notifications and multi-monitor support, aren't available in Lightning console apps. Learn more.

You can't migrate Salesforce Classic console apps to Lightning Experience.

Cases

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

Case Layout

Cases look slightly 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

For a better experience, we recommend that you add comments to the feed instead of the Case Comments related list. However, Case Comments are supported in Lightning Experience. If you sort a Case Comments related list and then refresh or close and return to it, your sort preferences aren't saved.

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.

Entitlements

Entitlements are available in Lightning Experience with some limitations.

- The Case Milestones related list isn't available on cases.
- The Milestones related list isn't available on work orders.
- The Milestones related list isn't available on work orders.
- The Milestone Tracker isn't available on work orders and cases.
- The Entitlement Templates related list isn't available on products.
- The Contacts related list isn't available on entitlements.
- The Entitlements related list isn't available on contacts.

Field Service Lightning

Service reports can't be deleted in Lightning Experience. To delete a service report, switch to Salesforce Classic.

Lightning Knowledge

Lightning Knowledge doesn't yet have full parity with Classic Knowledge. The following limitations apply to Lightning Knowledge:

Important considerations before enabling Lightning Knowledge

- You can have only one article type when enabling Lightning Knowledge. Currently, there are no migration tools to assist in merging your article types. To enable Lightning Knowledge, migrate your articles to one article type and disable or delete your other article types, or wait until migration tools are available to enable Lightning Knowledge.
- Lightning Knowledge currently doesn't support multiple language mode or translation.
- We recommend using Lightning Knowledge only if you have fewer than 300 data categories. If you have more than 300 data categories, you may experience slower performance.
- For articles with more than 30 versions, the versions above 30 will show in Salesforce Classic, but not in Lightning Experience.
- After you enable Lightning Knowledge, the 'ArticleType' field is no longer accessible via SOQL (or the API). This can impact custom code that queries for the 'ArticleType' field.
- If your org currently has a Visualforce tab named "Knowledge," you get an "Insufficient Privileges" error when trying to access the Knowledge tab in Lightning Knowledge. To avoid this error you can rename or delete your existing Visualforce tab, or rename your Knowledge Base from "Knowledge" to something else.

General usage limitations for Lightning Knowledge

- You can't currently assign articles or delete archived articles in Lightning Knowledge.
- You can't use article actions with public groups when Lightning Knowledge is enabled. This is replaced by new user profile permissions.
- You currently can't remove a published article while editing it. Instead, the article remains published while you edit the new version as a draft. You can still do this in Classic when Lightning Knowledge is enabled.
- You can't save as the same version when publishing an article in Lightning Knowledge. Publishing will always create a new version. You can still do this in Classic when Lightning Knowledge is enabled.
- You can't restore a past version of an article in Lightning. You can still do this in Classic when Lightning Knowledge is enabled.
- You can't use mass actions (such as mass archiving and mass publishing) with Lightning Knowledge.
- For list views, you must specify one language and one publishing status on all Knowledge list views. If one language and one publishing status are not specified in Listviews, we will default to "Published" for Publishing Status and the default user language for language.
- We don't support multiple-selection on PublishStatus or Language, or the "IN" and "OR" operators in list view filters.
- Data categories can't be shown in Knowledge list views.
- We don't support external data sources in Knowledge search in Lightning Knowledge.
- You can't see vote information in the new ratings component unless there's a Published (also known as online) version of the article. This affects article drafts and archived articles, because all online versions are removed when an article is archived.
- Most Knowledge actions aren't available in the Lightning Process Builder.
- In a Lightning Knowledge enabled org, the ModifyAll permission is necessary to delete archived articles

Console limitations for Lightning Knowledge

- The Knowledge footer is not in the Lightning Service Console.
- The following actions aren't available in the Knowledge Sidebar for the Lightning Service Console: attach as a PDF, attach as a PDF to case email, insert article contents to case email, insert Article Community URL, and insert article URL to case publishers.

Limitations in Salesforce Classic after enabling Lightning Knowledge

- Multiple Languages mode can't be enabled after Lightning Knowledge is enabled.
- Page Layouts selections for Actions and Related lists don't reflect in Salesforce Classic.
- Page Layouts don't display in two columns in Salesforce Classic.
- Some actions, such as Change Record Type, aren't available in Salesforce Classic.
- Knowledge list views aren't available in Salesforce Classic.
- You can't filter a search by Knowledge Record Type in Salesforce Classic.
- You can't filter a search by archived articles in Salesforce Classic, except in Article Management.
- Files in the Files Related list inLightning Experience don't display in Salesforce Classic, and files in the Article File Fields Salesforce Classic don't display in Lightning Experience.

Limitations for using Lightning Knowledge with other Salesforce products

- File attachments in your Classic Knowledge implementation don't transfer to Lightning Knowledge. After migrating your articles to Lightning Knowledge, add the Files related list to your page layout and use the Files related list on each article to add files to your articles.
- You can't detach or remove a file from the Files component after it has been associated with an Article. When the file is shared with a record via the record feed, the workaround is to delete the feed post. Read Delete Files and Links from Feeds to learn more about removing files.

- Currently, the only way to remove an attached file from an article is to delete the file from File home.
- Reporting with record types is not currently supported in Lightning Knowledge.
- The rich text editor is limited for Lightning Knowledge. The following rich text editor features aren't currently supported in Lightning Knowledge: smart links, anchors, and videos.
- If you are using the Salesforce1 for Android and IOS downloadable apps recent articles are not displayed on object home.

Omni-Channel

Omni-Channel is available in Lightning Experience as a utility in the Service Console app. This is a beta feature with known limitations.

Unsupported Objects

Objects that aren't supported in Lightning Experience can't be routed using the Omni-Channel utility. Currently, you can't route Live Agent chats or SOS sessions.

Omni-Channel Supervisor

Omni-Channel Supervisor isn't available in Lightning Experience. To use Omni-Channel Supervisor, switch to Salesforce Classic.

Active Time

Active Time tracking is unavailable for agents using Lightning Experience. You can see active time data only for agents using Salesforce Classic.

Omni-Channel Setup

Omni-Channel settings (including enabling Omni-Channel) are available only 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 these factors in mind when working in Lightning Experience:

- Open CTI for Lightning Experience works only in Lightning apps, and Open CTI for Salesforce Classic works only in Classic apps.

  The out-of-the-box Service app is a Salesforce Classic app. If you use softphones in the Service app, those softphones don't work when the app is launched from Lightning Experience.

  The out-of-the-box Service Console app is a Lightning Experience app. Use Open CTI for Lightning Experience in this app.

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

Unsupported Service Cloud Features

Most Service Cloud features aren't available Lightning Experience. Unsupported features include:

- Live Agent chats
- Milestones
- Macros
- Service contracts
- Contract line items

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 except that the createdby and modified by fields will not be displayed. .

SEE ALSO:

Open CTI Developer Guide

Reports and Dashboards: What's Different or Not Available in Lightning Experience

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

Reports

Features Not Available in Lightning Experience

Feature	Notes about Lightning Experience Availability
Joined Reports	
Schedule Report Refreshes	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.
Follow Reports	To follow reports, users must switch to Salesforce Classic. But, if Feed Tracking is enabled for Reports, then Chatter feeds are available in Lightning Experience.

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 Distribute" in the report footer. The disclaimer is excluded even if you disable the **Exclude Disclaimer from Exported Reports** setting in Setup.

Feature	Notes about Lightning Experience Availability
Filters	These filters are available when building or editing a report, but aren't shown in the filter panel when viewing a report. Even though you don't see the filters, 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.

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.
Reports Tab: Columns and Actions	Most functionality on the reports tab is the same between Salesforce Classic and Lightning Experience, but take note of these differences: • Both reports and dashboards are listed on the Reports tab in Salesforce Classic. In Lightning Experience, only reports are listed on the Reports tab. Dashboards are listed on the Dashboards tab. • In Salesforce Classic, the Reports tab displays these columns: Action, Name, Scheduled, Folder, Created By. In Lightning Experience, the Reports tab displays these columns: Report name, Description, Folder, Last Modified By, and Subscribed. Depending on which user perms they have, users may see fewer columns. • In Salesforce Classic, users see these actions in the action menu: Customize, Delete, Export. In Lightning Experience, users see these actions in the action menu: Run, Edit, Subscribe, Export, Delete. Depending on which user perms they have, users may see fewer columns. • In Lightning Experience, users can't rearrange and resize columns on the Reports tab like they can in Salesforce Classic.

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
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.
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.
Relative Dates in Dashboard Filters	Relative dates, such as "Last Month", aren't available.

Features Available with Limitations in Lightning Experience

Feature	Notes about Lightning Experience Availability
Follow Dashboards	In Lightning Experience, users can't follow dashboard components. Users only see dashboard feed activity (like posts) in their Lightning Experience feed.
	To follow dashboard components, users must unfollow the dashboard in Lightning Experience, switch to Salesforce Classic, and then follow the dashboard in Salesforce Classic.
Relative Dates in Dashboard Filters	You can't add or edit relative dates, such as "last month", to dashboard filters in Lightning Experience. Relative date filters set up in Salesforce Classic can be applied by dashboard viewers in Lightning Experience.

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	

Feature	Notes about Lightning Experience Availability
Move Reports between Folders	Users can move dashboards between folders from the Lightning Experience dashboard editor, but must switch to Salesforce Classic to move reports.
Share Report and Dashboard Folders	Sharing permissions set on folders in Salesforce Classic are obeyed in Lightning Experience, but sharing permissions can't be set nor changed.
Search for Report and Dashboard Folders	Users can't search for report and dashboard folders in Lightning Experience. Global search results include reports and dashboards, but not report and dashboard folders.

Charts

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.
	When tables display metric totals, they behave a little differently in Lightning Experience than they do in Salesforce Classic. In Lightning Experience, average displays the average of all rows, largest displays the maximum value, smallest displays the minimum value, and sum displays the sum. In Salesforce Classic, the sum of each metric is always displayed regardless of which metric is shown. For example, say that a three-row table displays the largest opportunity amount as 100, 200, and 300 dollars. In Lightning Experience, the table's total displays as 300. In Salesforce Classic, the table's total displays as 600.
Combination Charts	You can add these types of combination charts to dashboards in Lightning Experience: - Vertical bar chart with an added line chart - Vertical chart with up to four bars To add these types of combination charts to dashboards, switch to Salesforce Classic: - Stacked or grouped vertical bar chart with an added line chart - Line chart with an added line chart
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.

Feature	Notes about Lightning Experience Availability
Show Total in Donut Charts	When you configure donut charts to show totals using a measure that displays as a percentage, they behave differently in Lightning Experience and Salesforce Classic. In Lightning Experience, donut charts don't display the total percentage. Instead, they show a sum of chart segments. In Salesforce Classic, the average percent displays. For example, you configure a donut chart to show average probability, and group the chart by stage. The donut chart shows six segments, prospecting (10% average probability), needs analysis (20%), value proposition (50%), Identify Decision Makers (60%), negotiation (90%), and closed won (100%). In Lightning Experience, the donut chart displays 330 (10 + 20 + 50 + 60 + 90 + 100). In Salesforce Classic, the donut chart displays each average probability as a percent of the sum of all average probabilities. Each segment shows prospecting (10% / 330% = 3%), needs analysis (6%), value proposition (15%), Identify Decision Makers (18%), negotiation (27%), and closed won (30%). In the center, the donut chart displays the average, 50.39%.
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. 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 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, line and bar charts display up to 500 groupings. All other charts display up to 200 groupings. 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 Different or Not Available in Lightning Experience

Learn what 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

- You can't share files with libraries in Lightning Experience. However, 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 Notes & Attachments related list and related lists on the Files Detail page . You can delete and manage files using the row-level actions on Files home or the quick actions on a file's preview or detail page.

- You can't make files private in Lightning Experience.

- You can't share files via link 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.

Chatter: What's Different or Not Available in Lightning Experience

Learn what 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

There's no **Show link to post** option in Lightning Experience. But you can share links manually. That is, navigate to the post's detail view (by clicking its date/time information), copy the URL, and paste that into the publisher.

Filter and Sort Feeds

Users can filter group feeds in any way except by Fewer Updates.

Approvals in Chatter

Lightning Experience users can't respond to approval requests from Chatter or the activity timeline on records. To respond to approval requests, users go to the Approval Requests tab.

Topics

- You can use topics on a record's feed, but topics on objects aren't available in Lightning Experience.
- After a topic is added to a post, it's associated permanently to the post in the system, even if you remove it visibly by editing the post.
- There's a maximum of 10 topics per post, including topics in comments.
- There isn't a topic list view on the Chatter home page in Lightning Experience.
- Topic detail pages open only by clicking directly on the topic. You can't open a topic detail page by right-clicking to open in a new tab.

Highlighted Search Results

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

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.

Following

The count of things a user is following in Salesforce Classic includes both users and records. In Lightning Experience, this count only includes users.

Groups

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

- 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.

Recommendations

- Recommendations appear only on the Chatter home page.

- Files and records aren't recommended.

Communities: What's Different or Not Available in Lightning Experience

Learn about the issues to expect when using communities in Lightning Experience.

Switch to Salesforce Classic for the following functionality:

- The global header

  > **Note:** To switch between your org and communities in Lightning Experience orgs, use the App Launcher.

- Creating and disabling partner accounts and users

- Creating and disabling customer accounts and users

- Logging in as a community user

- Using delegated administration

Navigation and Actions: What's Different or Not Available in Lightning Experience

Learn what 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

Customize Tab Sets

In Salesforce Classic you can specify which tabs display in your app. In Lightning Experience, admins control which items display in an app and in which order, but users can access important records, lists, groups, dashboards, and other frequently used pages with favorites.

Custom Lightning Experience Navigation Bars Support Most Apps and Objects

You can create custom Lightning 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 bars: 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.

Chatter and Forecasts Tabs

You can hide the Chatter and Forecasts tabs using the Tab settings on the Profile Edit page in both Salesforce Classic and Lightning Experience, but in Lightning Experience the tabs display regardless of the settings.

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

SEE ALSO:

What's the Fate of Existing Salesforce Customizations?

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

Search: What's Different or Not Available in Lightning Experience

Learn what 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

These objects aren't searchable in Lightning Experience: Attachment, Coaching, Community, Contract Line Item, D&B Company, Document, Discussion, Goal, Idea, Live Chat Transcript, Macro, Metric, Performance Cycle, Question, Quick Text, Resource Absence, Reward Fund, Reward Fund Type, Salesforce CRM Content, Self-Service User, Service Contract, Service Resource Skill, Service Territory Member, Skill, Solution, 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.

Results for Some Objects Can't Be Sorted

Sorting isn't available for Chatter group, file, and Knowledge article search results.

Column Width on Search Results Page Can't Be Adjusted

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.

User-Defined Lookup Filter Fields Aren't Supported

However, because lookup search results use the same relevance rankings as global searches, users see 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.

Knowledge Article Search Results

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. In addition, you can't sort Knowledge article search results.

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.

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.

Admin-Defined Related and Dependent Lookup Filters Can't Be Made Optional

Once added, all lookup filters are required, even if admins specify them as optional in Setup. There's no **Show all results** view for users. User-defined lookup filter fields aren't supported.

No Results for Customer Portal or Partner Portal Users in Lookup Search Results

However, if the user record was recently viewed, the record appears in lookup instant result suggestions.

Org Setup: What's Different or Not Available 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 Different or Not Available in Lightning Experience

Programmatic Customization: What's Different or Not Available in Lightning Experience

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

Learn what 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 Limitations

Some legacy data import tools aren't available in Lightning Experience.

Data.com

In Data.com Prospector, options for search and filtering are more limited in Lightning Experience. Data.com Clean setup isn't available
in Lightning Experience; nor are metrics and analytics. Certain Clean object fields can't be modified in Lightning Experience.

Duplicate Management: Differences in Lightning Experience

Learn what to expect when using duplicate management in Lightning Experience.

Data Import Limitations

Some legacy data import tools aren't available in Lightning Experience.

They are:

- 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

In Data.com Prospector, options for search and filtering are more limited in Lightning Experience. Data.com Clean setup isn't available
in Lightning Experience; nor are metrics and analytics. Certain Clean object fields can't be modified in Lightning Experience.

Data.com Prospector

Data.com Tab Not Available

Search for accounts from the accounts list view. Search for contacts for an account from the account's detail page.

Contacts Search

You can search for a contact only if it's related to an existing account. To search for a contact, go to the accounts detail page.

Contacts as Leads

You can't add Data.com contacts as leads.

Limited Search for Account Fields

When you search for accounts, you can filter only on these fields:

- Annual Revenue
- Company or Website
- Country/territory
- Location Type
- State

Saved Searches Not Available

You can't save searches.

Data.com Record Export

You can't export Data.com records in comma-separated value (CSV) format.

Data.com Clean

Data.com Clean Settings Page Not Available

The Data.com Clean Settings page isn't available, so you can't enable or disable Data.com Clean.

Data.com Clean Preferences Page Not Available

The Data.com Clean Preferences page isn't available, so you can't configure Data.com Clean preferences.

Data.com Clean Jobs Page Not Available

The Data.com Clean Jobs page isn't available, so you can't schedule Clean jobs or view Clean job history.

Data.com Clean Metrics and Analytics Page Not Available

The Data.com Clean Metrics and Analytics page isn't available, so you can't view Clean job metrics or analytics.

Manual Clean Limitations

Suppose that you have a Clean job but you don't have an active Company Info for Accounts or Company Info for Leads rule. Your users can't clean records manually. If you include the Clean button associated with Clean jobs in a Salesforce Classic page layout, the button isn't displayed in Lightning Experience.

No Support for Modifying Fields in Clean Info Objects

You can't modify the fields in the Account Clean Info, Lead Clean Info, or Contact Clean Info objects.

Duplicate Management: Differences in Lightning Experience

Learn what to expect when using duplicate management in Lightning Experience.

Differences in the User Interface for Viewing Duplicates and Merging

In Lightning Experience, duplicate alerts are displayed on the record home page for an account, contact, or lead. In Salesforce Classic, duplicate alerts are displayed on a record home page, on an object home page, or in a related list, depending on the object.

Contacts Associated with Portal Users

When you use Lightning Experience to merge contacts associated with portal users, the portal user status isn't shown during merging. The merged record retains the portal user status of the master record. When you use Salesforce Classic or the API to merge contacts associated with portal users, the portal user status is shown during merging. You choose the portal status you want to retain in the merged record.

Merging Person Accounts

Lightning Experience doesn't support merging of person accounts.

Merging Accounts Associated with Relationship Groups

Because relationship groups aren't supported in Lightning Experience, you can't merge accounts associated with relationship groups.

Process Automation: What's Different or Not Available in Lightning Experience

Approvals

Finding Approval Requests

Lightning Experience users can't respond to approval requests from Chatter or the activity timeline on records. To respond to approval requests, users go to the Approval Requests tab.

Responding to Approval Requests

You can't unlock a record that's locked for approval.

Approval Comments

The approval detail page displays only comments related to that approval request. To see all approval comments for a record, click **View All** in the Approval History related list.

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

Paused Flow Interviews

To resume a paused flow interview, the user must switch to Salesforce Classic or use Salesforce1.

Security: What's Different or Not Available in Lightning Experience

Learn what 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 try 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.

Point-and-Click Customization: What's Different or Not Available 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. Check out Lightning Alternatives to JavaScript Buttons in Trailhead for a great list of Lightning-friendly solutions for your JavaScript button use cases.

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, at the top of the page, 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

In Lightning Experience, only the first four fields on a related list are displayed. Users can click **View All** to see the rest of the fields.

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, record types, and profiles.

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 Different or Not Available in Lightning Experience

What's the Fate of Existing Salesforce Customizations?

Programmatic Customization: What's Different or Not Available 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.

Visualforce

Here are some of the most important considerations for orgs 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 Salesforce user interface. 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 Different or Not Available in Lightning Experience

Apps on AppExchange that are certified as Lightning Ready are supported in Lightning Experience. 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.

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 if 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, topics, groups, and recommendations aren't available.
- User profiles are still available, but feeds and groups aren't available on profiles.
- The Chatter or Feed tab isn't available on records.
- Users can't follow records or other users.

Lightning Experience Roadmap

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

> **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	Summer '17	Winter '18	Future
Reports and Dashboards					
Dashboards: % shown on gauges	✓				
Dashboards: Conditional highlighting	✓				
Dashboards: Combo charts				✓	

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Dashboards: Create and edit dynamic dashboards		✓			
Dashboards: Drill to report from filtered dashboard	✓				
Dashboards: Drill to filtered report				✓	
Dashboards: Drill to customer URL or record detail page					✓
Dashboards: Edit filtered			✓		
Dashboards: Relative date filters				✓	
Dashboards: Edit running user		✓			
Dashboards: Edit table chart types			✓		
Dashboards: Follow		✓			
Dashboards: Scheduling to yourself				✓	
Dashboards: Scheduling to multiple users					✓
Dashboards: Show dashboard component on Lightning home page				✓	
Dashboards: Row limit reports			✓		
Dashboards: View chart parity with Salesforce Classic			✓		
Dashboards: Edit chart parity with Salesforce Classic					✓

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Reports: Accessible Report Builder				✔	
Reports: Chart parity with Salesforce Classic					✔
Reports: Conditional formatting					✔
Reports: Dynamic filter via URL		✔			
Reports: Folder management				✔	
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: Subscriptions (email to multiple users, change running user)			✔		
Chatter and Files					
Feature	**Winter '17**	**Spring '17**	**Summer '17**	**Winter '18**	**Future**
Chatter: Edit posts	✔				

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Chatter: Edit comments	✓				
Chatter: Rich text in posts and comments	✓				
Chatter: Multiple file attachments in posts	✓				
Chatter: Share posts		✓			
Chatter: Topics			✓		
Chatter: Recommendations			✓		
Chatter: Relevance ranked feed search results			✓		
Chatter: Chatter Messenger					Never
Content Deliveries: Via email attachment	✓				
Content Deliveries: Generate link			✓		
Files: Upload multiple files to records and groups	✓				
Files: Share Connect Files with records and groups via File Selector	✓				
Files: Add Files to Library			✓		
Files: Files sync client (desktop)					Never
Files: Folders in libraries	✓				
Files: Private related files					✓
Files: Sort Files global search results					✓

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
and Display Date column					
Groups: Search groups	✔				
Groups: Broadcast groups	✔				
Groups: Recommendations				✔	
Groups: Records types	✔				
Platform					
Feature	**Winter '17**	**Spring '17**	**Summer '17**	**Winter '18**	**Future**
Actions and buttons on related lists		✔			
Approvals: Items To Approve component		✔			
Approvals: Object Home		✔			
Approvals: Support manual selection		✔			
Approval Action: Reassign			✔		
Approval Action: Recall			✔		
Approval Mass Actions			✔		
Approval Comments			✔		
Branding per app	✔				
Branding: Org branding controls					✔
Favorites in Lightning Experience		✔			
Favorites in Salesforce1					✔

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Field help	✔				
Field history tracking			✔		
JavaScript buttons					Never
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					✔
Lists: Inline edit	✔				
Lists: Mass actions	✔				
Lists: Mass action change owner					✔
Lists: Mass Inline Edit				✔	
Lists: Filter scopes					✔
Lists: Save as				✔	
Lists: Share with Groups					✔
Lists: Export					✔
Lists: Rolodex on Lists					✔
Lookups: Dependent filtered lookups		✔			
Navigation: Customize item menus on navigation bar					✔

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Navigation: End user customization of navigation bar					✓
Navigation: Prevent users from switching back to Salesforce Classic			✓		
Printable View and print page					✓
Recycle Bin					✓
Related Lists: Mass actions		✓			
Related Lists: Mass inline edit					✓
Related Lists: Resizable columns by user					✓
Related Lists: Links				✓	
Related Lists: User filtering					✓
Sharing: Manual sharing					✓
Platform: Console					
Feature	**Winter '17**	**Spring '17**	**Summer '17**	**Winter '18**	**Future**
Accessibility		✓			
Choose how records display					✓
Domain whitelist / third-party domain tabs					✓
History utility		✓			
IE11 support for console				✓	
Keyboard shortcuts: Standard			✓		
Keyboard shortcuts: Custom					✓

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
List push notifications					✔
Multi-monitor support					✔
Navigation and Utility JavaScript API (Console Integration Toolkit)				✔	
Person Account support			✔		
Push notifications					✔
Related list components: Accordion					✔
Related list components: Stacked and tab		✔			
Remember workspaces on logout		✔			
Split view (pinned list)			✔		
Utility Bar		✔			
Visualforce components in Utility Bar					✔
Visualforce overrides support					✔
Workspaces and subtabs		✔			
Workspace components: components spanning subtabs					✔
Sales					
Feature	**Winter '17**	**Spring '17**	**Summer '17**	**Winter '18**	**Future**
Accounts: Account contact roles					Never

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Accounts: Account partners					✔
Accounts: Hierarchy		✔			
Account Teams: Add and edit multiple members					✔
Account Teams: Delete all members					✔
Calendar: Monthly view	✔				
Calendar: Scheduling (external calendar required)			✔ (O365)	✔ (GCal)	
Calendar: Event invitees (part of Scheduling)			✔ (O365)	✔ (GCal)	
Calendar: Recurring events					✔
Calendar: Sharing and multi-user calendar					✔
Calendar: Public and resource calendar					✔
Campaigns: Add leads and contacts from list	✔				
Campaigns: Hierarchy		✔			
Campaign Members: Mass actions on related list, clone, manage status		✔			
Contact: Hierarchy			✔		
Contact: Auto-populate address, phone, and fax from parent account			✔		

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Contracts	✓				
Divisions					✓
Email: Classic templates available in Lightning Experience			✓		
Email: Quick Action on any object		✓			
Email: Mass email				✓	
Email: Open tracking					✓
Email: Template folders and management					✓
Forecasts: Collaborative		✓			
Forecasts: Customizable					Never
Leads: Manually run assignment rules on create and edit		✓			
Lead Convert: Map custom fields to account, person account, contact, and opportunity		✓			
Lead Convert: Display matching accounts in Account drop-down menu			✓		
Lead Convert: Pre-populate company name in Account and suggested Opportunity name				✓	
Merge: Accounts and contacts		✓			
Merge: Leads	✓				

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Merge: Person Accounts				✓	
Notes: Private notes				✓	
Opportunities: Owner editability of Forecast Category				✓	
Opportunities: Product schedules					✓
Opportunities: Clone with products				✓	
Opportunities: Save and add products				✓	
Opportunities: Opportunity partners					✓
Opportunities: Opportunity splits					✓
Opportunities: Similar opportunities					Never
Opportunities: Stage history			✓		
Opportunity Contact Roles: Add and edit multiple contacts					✓
Opportunity Products: Add and edit multiple products		✓			
Opportunity Teams: Add and edit multiple members					✓
Orders		✓			
Person Accounts: Setup in Lightning Experience					✓
Person Accounts: Email template and merge field support			✓		

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Person Accounts: Display all related records for a person account in Cases and Notes related lists			✓		
Person Accounts: Display all related records for a person account in Assets related lists					✓
Person Accounts: Customizable Lightning pages		✓			
Products and Price Books: Archiving					✓
Quotes	✓				
Quotes: Email quote PDF		✓			
Tasks: Custom list views					✓
Tasks: Followup tasks		✓			
Tasks: Recurring tasks		✓			
Tasks: Reminders				✓	
Territory Management: Territory field on account and opportunity					Never
Enterprise Territory Management: Related list on account, Territory field on opportunity				✓	
Enterprise Territory Management: Setup in Lightning Experience					✓

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Service					
Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Cases: Manually run assignment rules on create and edit		✓			
Cases: Case teams					✓
Cases: Classic case comments			✓		
Cases: Clone				✓	
Cases: Contact roles					✓
Cases: Experts					✓
Cases: Feed filters			✓		
Cases: Files component			✓		
Cases: Kanban		✓			
Cases: Macros				✓	
Cases: Bulk Macros					✓
Cases: Merge and split cases					✓
Cases: Quick text				✓	
Cases: Related record (lookup) component		✓			
Cases: Related list component		✓			
Cases: Topics					✓
Entitlements related list				✓	
Lightning Knowledge: Record types replace article types		✓			
Lightning Knowledge: Unified		✓			

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
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: Importing with record types and files			✓		
Lightning Knowledge: Communities support			✓		
Lightning Knowledge: Hover			✓		
Lightning Knowledge: Configure record home Lightning page			✓		
Lightning Knowledge: Setup in Lightning Experience			✓		

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Lightning Knowledge: Salesforce1			✓		
Lightning Knowledge: Support for multi-language orgs				✓	
Lightning Knowledge: Search and view multi-language articles				✓	
Lightning Knowledge, Console sidebar action: Insert Article to Case Email				✓	
Lightning Knowledge: Assign Draft action				✓	
Lightning Knowledge, Rich Text Editor: Video and code block				✓	
Lightning Knowledge: Tools for migrating to Lightning Experience					✓
Lightning Knowledge: Translation flows					✓
Lightning Knowledge: Authoring actions in Process Builder					✓
Lightning Knowledge: Mass actions					✓
Lightning Knowledge, Rich Text Editor: Anchors					✓

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Lightning Knowledge, Rich Text Editor: Smart links					✔
Lightning Knowledge, Console sidebar action: Insert PDF to Case Email					✔
Lightning Knowledge, Console sidebar action: Insert URL to Case Publisher					✔
Lightning Knowledge: Federated search					✔
Live Agent				✔	
Milestones console component				✔	
OmniChannel: Channel presence and routing			✔		
OmniChannel: Supervisor				✔	
Open CTI	✔				
Open CTI for Console		✔			
Public Knowledge Base (PKB)					Never
Service Console—see the "Platform: Console" section					
Service Contracts related list				✔	
Social Customer Service		✔			

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
Social Customer Service: Facebook reviews			✓		
Social Customer Service: Inbound attachments			✓		
Social Customer Service: Outbound attachments				✓	
Social Customer Service: Conversations sidebar				✓	
Social Customer Service: Social business rules				✓	
Service Setup: Email to case Twitter setup flow		✓			
Service Setup: Twitter setup flow		✓			
Service Setup: Facebook setup flow		✓			
Service Setup: Communities setup flow			✓		
Service Setup: Knowledge setup flow			✓		
Service Setup: OmniChannel setup flow					✓
Service Setup: Live Agent setup flow					✓
Service Setup: SOS setup flow					✓
Solutions					Never
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 Forecasts
Account: Account Contact Roles	Contacts to Multiple Accounts
JavaScript buttons	Lightning Actions

SEE ALSO:

Lightning Components Roadmap

Lightning Components Roadmap

Lightning components are self-contained and reusable units that you use to assemble and configure new components or entire apps. The Lightning Component framework includes a set of prebuilt, out-of-the-box components to help kick start your development efforts. Here are some of the base components we're working on.

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	Summer '17	Winter '18	Future
lightning:badge	✓				
lightning:button	✓				
lightning:buttonGroup	✓				
lightning:buttonIcon	✓				
lightning:buttonMenu	✓				
lightning:card	✓				
lightning:formattedDateTime	✓				
lightning:formattedNumber	✓				
lightning:icon	✓				

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
lightning:input	✓				
lightning:layout	✓				
lightning:layoutItem	✓				
lightning:menuItem	✓				
lightning:select	✓				
lightning:spinner	✓				
lightning:tab	✓				
lightning:tabset	✓				
lightning:textarea	✓				
lightning:avatar		✓			
lightning:container		✓			
lightning:inputRichText		✓			
lightning:breadcrumb			✓		
lightning:breadcrumbs			✓		
lightning:buttonStateful			✓		
lightning:pill			✓		
lightning:relativeDateTime			✓		
lightning:tile			✓		
lightning:accordion				✓	
lightning:buttonIcon (stateful)				✓	
lightning:checkboxGroup				✓	
lightning:comboBox				✓	
lightning:dataTable				✓	
lightning:dualListBox				✓	
lightning:dynamicIcon				✓	
lightning:file				✓	
lightning:fileUpload				✓	
lightning:input (Lightning Design System-based color picker)				✓	

Feature	Winter '17	Spring '17	Summer '17	Winter '18	Future
lightning:input (Lightning Design System-based date, datetime, and time pickers)				✓	
lightning:inputField				✓	
lightning:modal				✓	
lightning:notifications				✓	
lightning:outputField				✓	
lightning:panel				✓	
lightning:path				✓	
lightning:popover				✓	
lightning:progressBar				✓	
lightning:progressIndicator				✓	
lightning:radioGroup				✓	
lightning:slider				✓	
lightning:tree				✓	
lightning:verticalNavigationBar				✓	
lightning:carousel					✓
lightning:chart					✓
lightning:listView					✓
lightning:lookup					✓
lightning:map					✓
lightning:mapMarker					✓
lightning:picklist					✓
lightning:recordForm					✓
lightning:treeGrid					✓

SEE ALSO:

Lightning Experience Roadmap

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.

Get Started Using Lightning Experience

Help

Find Your Way Around Lightning Experience

Trailhead

Sales Rep Trail—Sell Lightning Fast with Sales Cloud

Evaluate and Roll Out Lightning Experience for Your Org

Help

What Makes Lightning Experience So Special?

Is Lightning Experience Right for Your Salesforce Org?

Evaluate Your Org in Lightning Experience

Roll Out 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 Summer '17

Develop for Lightning Experience

Trailhead

Developer Trail—Lightning Experience

Walk Through Lightning Experience

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