How to Transition to Lightning Experience

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CONTENTS

HOW TO TRANSITION TO LIGHTNING EXPERIENCE

Salesforce Lightning is the next generation of Salesforce, delivering a reimagined user experience, a powerful platform for fast and easy app development, and the AppExchange ecosystem for ready-to-install solutions. Harness the power of Lightning to transform your business and benefit everyone, from execs and business users to admins and developers.

Get all the features and functionality that you're entitled to by transitioning your org to the new user interface, Lightning Experience. As an admin, you are your company's trusted advisor for all things Salesforce and you'll help decide how to prepare for and roll out Lightning Experience to your users. This guide walks you through the recommended process, including key steps and best practices.

It's Time for Lightning Experience

The time for Lightning Experience is now! Salesforce Classic isn't going away yet, but all new Salesforce innovation is in Lightning Experience only. Clearly Lightning Experience is the place to be, so how do you get there? Fear not, there are resources and tools at your fingertips to help you take control and drive a smooth transition.

Discover Phase: Start Your Lightning Experience Transition

Kick off your Lightning Experience transition with a discovery period. Learn about the benefits and ROI that your company can get from moving to Lightning Experience and evaluate your production org's readiness for the new interface. Then plan your rollout and change management strategies and align with stakeholders on your transition goals.

Roll Out Phase: Get Ready to Launch Lightning Experience

With your rollout plan in place and your stakeholders on board, you're ready to start preparing your org—and your users—for Lightning Experience. This is the time to kick off your change management strategy. And time to get busy on release development activities, including implementing Lightning Experience features and addressing the priority issues noted in your Readiness Report. The last piece is going live by giving users access to the new interface!

Optimize Phase: Make Lightning Experience Stick

The transition project doesn't end when you give users access to Lightning Experience. Busy people aren't always eager for change, so keep an eye on adoption rates and encourage users to stay in the new interface. This is also the time to iterate on your rollout plan by moving over more users, adding new features and use cases, and looking for ways to improve your implementation. And when the day comes to turn off access to Salesforce Classic, you can call your transition a success!

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

Lightning Experience re-envisions Salesforce and as a result, there are some classic features that have been implemented differently or don't have a place in the new interface. And there are some classic features that are on the roadmap for an upcoming release. Review these topics to see if any functionality that's critical to your business has changed significantly in Lightning Experience, or is limited or unavailable in this release. This information can help you train users about what to expect when you roll out Lightning Experience.

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A Framework for Transitioning to Lightning Experience

Based on our experiences and those of the thousands of customers who have already moved to Lightning Experience, we defined a path that you can follow for your own journey. The path is a framework that recommends the structure and best practices for a successful transition. Use the steps that make sense for your company as you roll out Lightning Experience to your org.

Salesforce Classic Doesn't Go Away When You Move Users to Lightning Experience

Saying hello to Lightning Experience doesn't mean saying goodbye to Salesforce Classic. You and your users can easily move between the new and classic interfaces as needed. So even if Lightning Experience isn't a perfect fit yet, there's no risk in starting to roll it out. Some occasional switching is worth getting the productivity benefits from the new experience.

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For easier manageability and a faster transition, we recommend approaching things in three phases. The phases break down into a few stages, each with a set of recommended activities.

Discover	
	• Learn how Salesforce Lightning—from the platform and ecosystem to the user experience—benefits your company.
	• Evaluate your org's business priorities and technical strategy, and your org's readiness for Lightning Experience.
	• Plan for your rollout by deciding to move users in groups or all at once. Decide how to train and prepare users for the coming change and how to measure your success.
	• Align with stakeholders and executives to make the case and get the green light.
Roll Out	
	• Prepare users for Lightning Experience with change management activities that educate and excite.
	• Implement productivity-enhancing features that are available only in Lightning Experience to give your users a boost.
	• Adjust existing customizations and features to work in Lightning Experience.
	• Launch Lightning Experience to users.
Optimize	
	• Measure that you're hitting your goals, improving the business, and delivering what users need.
	• Motivate users to adopt Lightning Experience and give up Salesforce Classic.
	• Iterate on your rollout plan by fixing priority issues, refining the experience, and addressing new use cases.
	• Turn off Salesforce Classic for your org and call your transition finished!

Don't worry, this doesn't have to be a massive, lengthy effort. In fact, many customers began moving users within a month or two of starting their transitions. We recommend taking an iterative, agile approach where you break up the work—and the number of users you move—into a few groups.

Depending on the size of your organization, you could be working with a Change Management department or have a project manager assigned to the transition. Or perhaps you're the one charged with organizing and executing the transition from start to finish. However the work gets divvied up, use the Lightning Experience Transition Assistant to follow the path.

SEE ALSO:

Meet the Lightning Experience Transition Assistant

Video: Plan for a Phased Rollout (Starting with a Pilot)

Meet the Lightning Experience Transition Assistant

Looking for help with moving your org from Salesforce Classic to Lightning Experience? Meet the Lightning Experience Transition Assistant, your central hub for all of the recommended activities, tools, and resources for a successful transition.

Accessing the Transition Assistant in Salesforce Classic is a no-brainer. From Setup, click **Get Started** in the Lightning Experience Transition Assistant tile at the top of the menu.

The Transition Assistant is available from Setup in Lightning Experience too. Click **Lightning Experience Transition Assistant** at the top of the menu.

EDITIONS

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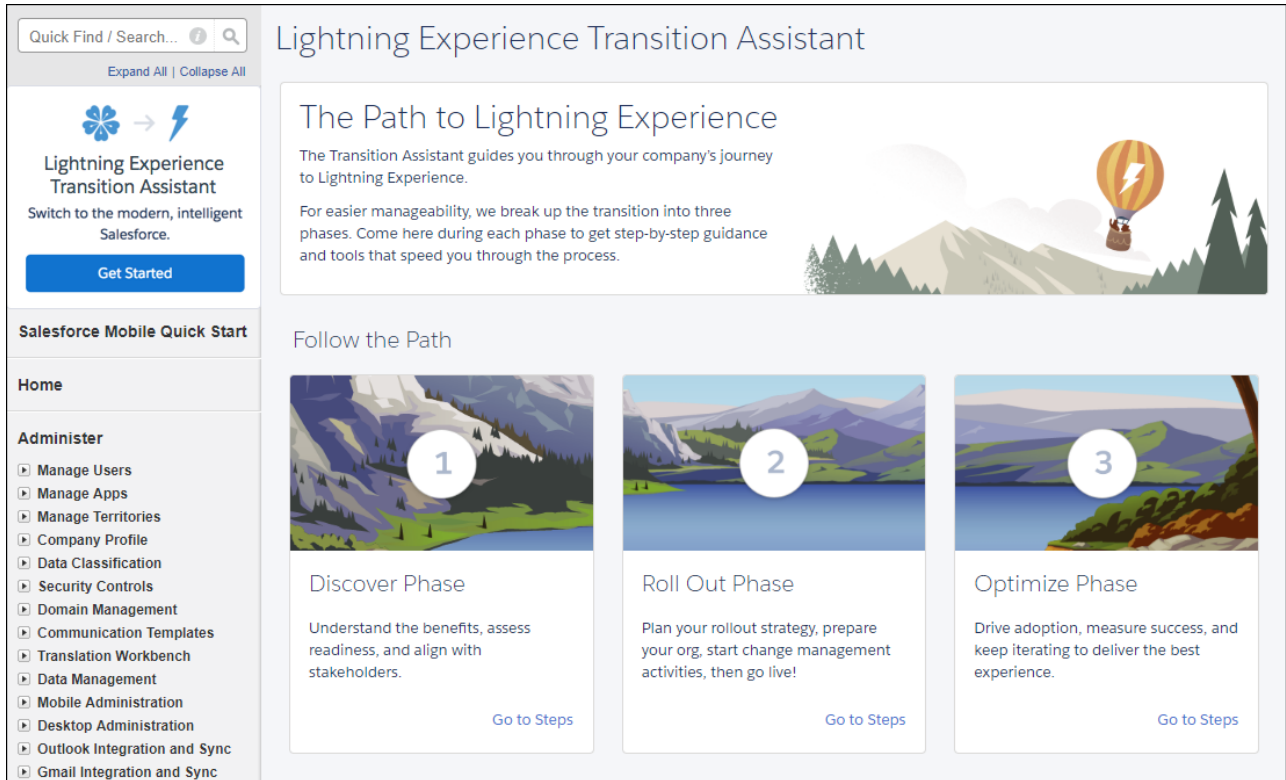
USER PERMISSIONS

To use the Lightning Experience Transition Assistant:

- View Setup and Configuration

  AND

  Customize Application

The Transition Assistant guides you through each phase and stage on the path to Lightning Experience.

- Discover phase: Learn about the benefits and return on investment that your company gets with Salesforce Lightning and assess your org's readiness for moving to Lightning Experience. Then plan your rollout and change management strategies and align with stakeholders on transition goals.

- Roll Out phase: Get ready to roll out Lightning Experience by preparing your users and preparing your org. Turn on key Lightning Experience features and adjust existing customizations. Then launch Lightning Experience to your users.

- Optimize phase: Drive user adoption of Lightning Experience and iterate on the rollout plan with more users, new use cases, and continuous improvement. Finish your transition by turning off access to Salesforce Classic.

In each phase, you get step-by-step instructions and tools that speed up transition tasks. Activities are grouped into a series of stages that keep you organized and help you track your progress. To see the recommended activities in a stage, click the > icon.
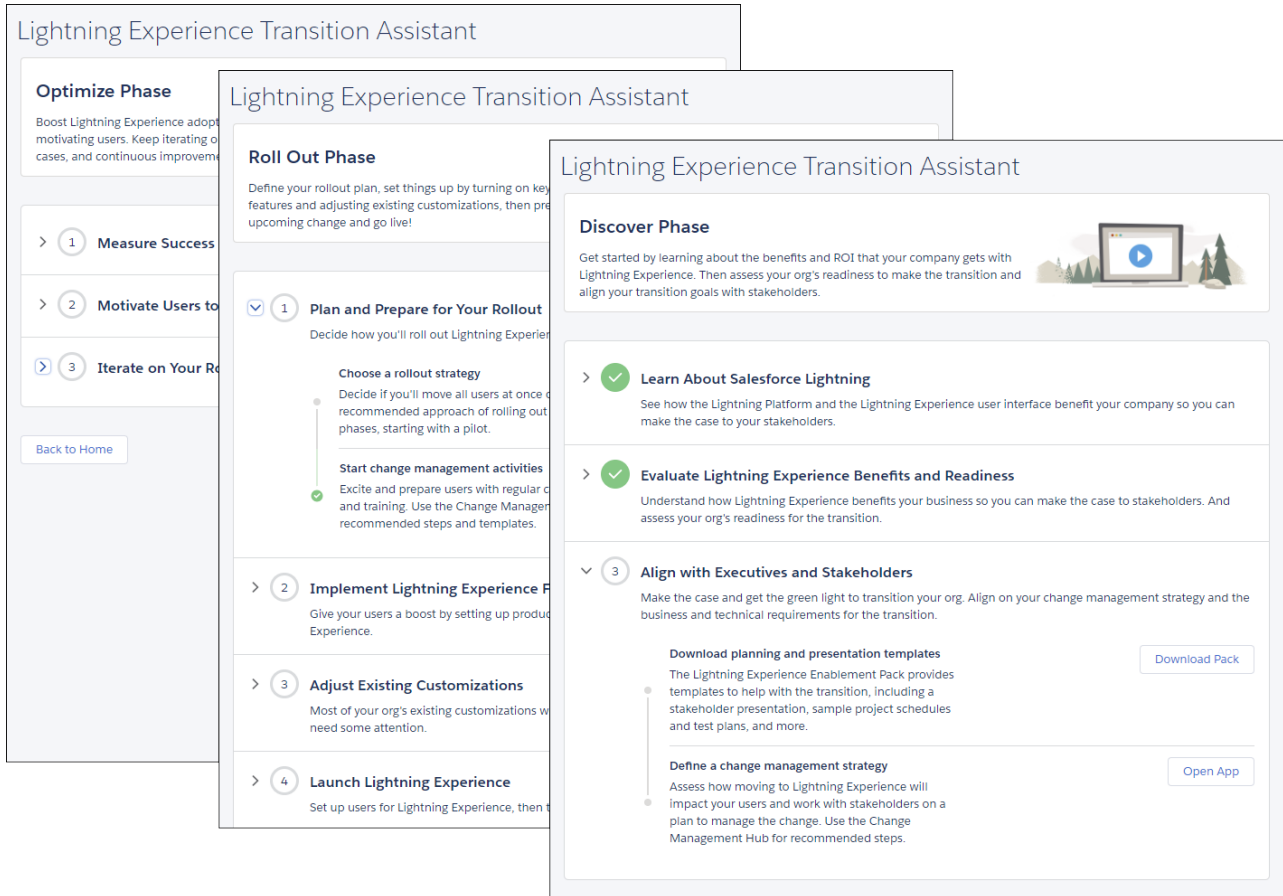
The Transition Assistant is designed to move you quickly and efficiently along the path to Lightning Experience. But you can tackle activities in whatever order makes sense for your org. There's no need to fix everything at once or follow every step. And because we recommend taking an iterative approach, you can repeat activities until you've moved all of your users to the new interface.

The Transition Assistant helps you keep track of the work you've completed and where you've left off by showing when you've taken an action (1) and when you've completed a stage (2).

SEE ALSO:

A Framework for Transitioning to Lightning Experience

Lightning Experience Enablement Pack

Lightning Experience Enablement Pack

To help jump-start your move to Lightning Experience, we provide an Enablement Pack that's chock-full of rollout resources and customizable templates. Use the pack to prepare for and complete a successful Lightning Experience transition.

What's included:

- Lightning Experience presentation deck, for demo'ing the new experience to your execs, stakeholders, and teams.
- Customizable user training deck, for delivering in-person training to get your users excited about and prepared for the new interface.
- Sample email drip campaign, for raising awareness about the coming launch and promoting key features.

The pack also includes resources for planning your rollout, including a project schedule template and a rollout checklist to keep you focused and on track.

Lightning Experience Migration Assistant

The Lightning Experience Migration Assistant has been replaced by the Lightning Experience Transition Assistant, your central hub for all of the recommended activities, tools, and resources for a successful transition.

For more details, see Meet the Lightning Experience Transition Assistant.

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Ideally, Lightning Experience meets the needs of everyone in your org. But just in case someone needs access to a feature or tool that's still back in the classic interface, we provide the Switcher. All users who have access to Lightning Experience automatically get the Switcher. Which they can use to...wait for it...switch between Lightning Experience and Salesforce Classic anytime they need.

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- In the Lightning Experience header, click the profile picture and select **Switch to Salesforce Classic**.
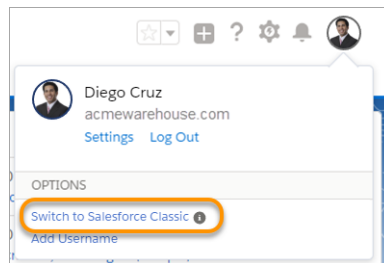
- In the Salesforce Classic header, click **Switch to Lightning Experience**. (The Switcher link is also available from a user's profile menu.)
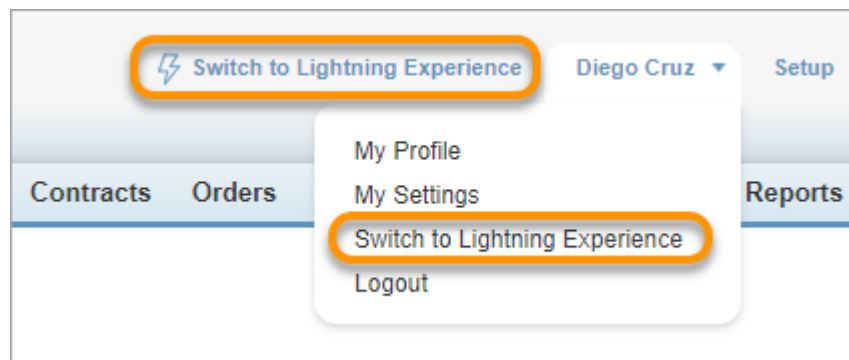
When switching out of Salesforce Classic, a user lands on the same page in Lightning Experience, if it exists. If the same page isn't available in Lightning Experience, the user sees their default landing page instead.

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

SEE ALSO:

Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

Set Up User Access to Lightning Experience

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Learn What Makes Lightning Experience So Special

To maximize the value of moving your business operations to Lightning Experience, invest some time in learning about the possibilities. The power of Lightning means you can create a user experience that improves workflow and productivity, makes jobs easier and more intuitive, even transforms your business. When you understand your options, you're well set to design a thoughtful transition that reevaluates existing customizations and eliminates old problems. And you're armed with the data to make a compelling case to your leadership and other decision makers.

Evaluate Lightning Experience Benefits and Readiness

As you prepare for the transition to Lightning Experience, there are three issues to evaluate: how does the change benefit your company, what work is needed to prepare for the change, and how much will it cost. This is the stage to make the case for moving to Lightning Experience by calculating the return on investment your company will get and defining what your Lightning Experience implementation will look like. Use the information you collect in this stage to define business and technical requirements and the level of effort for your rollout.

Plan Your Lightning Experience Rollout

After completing an evaluation to understand your business goals and technical issues, pull your research together into a plan for rolling out Lightning Experience. As part of the plan, decide on the strategies for moving users to the new interface (all at once or in groups) and for preparing them for the coming change. We recommend rolling out in phases, starting with a pilot, so you don't have to do everything at once and can learn and refine as you go. The same goes for your rollout plan. Don't over-plan now and iterate on priorities after each group that you transition.

Align with Stakeholders on Your Lightning Experience Transition

Wrap up the Discover phase by aligning with executive leadership and affected stakeholders on the case for Lightning Experience. Make sure that there's consensus on the business goals, technical requirements, and your rollout and change management strategies. You need this group to green light your plans and allocate resources for the work. And having your leadership's support is key to building trust with users and helping them understand that moving to Lightning Experience is beneficial and worth their time.

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Loads of resources in Trailhead and Salesforce Help give you the 411 on the opportunities waiting for you with Lightning Experience and the Lightning Platform. For now, let's look at some key features that are available only in Lightning Experience. They're sure to answer your users' question: what's in it for me?

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. See exactly what needs doing in the Assistant.
Grouped Record View	Drive the right behaviors at every stage of your sales process with Grouped view for record pages. Reps work their deals more efficiently with opportunities that promote the right action at the right time. Accounts and contacts drive customer insights, easy access to details, and clean data with field-level duplicate matching.
Path	Guide reps through the steps of a process, such as working an opportunity from a fresh lead to closing a deal. At each step, help your team succeed with specific guidance and resources. And celebrate key milestones by tossing some virtual confetti when reps reach a designated Path stage.
Activity Timeline	See open tasks, planned meetings, and accomplishments in the activity timeline on activity-enabled objects. Quickly log calls, create tasks, send emails, and more from the handy composer.

Feature	Why It's Cool
Kanban	Visually review the status of records for most objects. Drag records from one column to another. For opportunities, get alerts when an action is needed on a key deal.
Enhanced 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.
Email	Send email through Office 365 or Gmail accounts with your Salesforce email. And see the email messages you've sent in your Office 365 or Gmail Sent Items folder for flawless integration.
Collaborative Forecasts	Manage forecast types and sales quotas in Setup. Enable territory forecasts, product and schedule date forecasts, and custom measure (currency and number) forecasts. Forecast managers can share their forecasts with any Salesforce user at their company. In the opportunity list, forecast users can wrap text and use quick filters to update opportunities. And for all forecast types, users can hide rows that contain only zeros.
Salesforce Meetings	Effortlessly align with colleagues before sales meetings, and engage prospects and customers like never before. When sales reps glance at their scheduled events, reps see relevant, Salesforce-logged details about their event attendees—even external ones. During virtual meetings, sales teams can capture their audience with a unique camera and presentation view.
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.
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. Scroll through multi-page documents, preview animated GIFs, give full-screen presentations, and access file actions.
Live Feeds	See live posts in group feeds and live comments in all feeds without refreshing the page. See who's commenting while they're typing.
Streams	Easily track related information in one place by combining up to 25 feeds into one super-feed—called a *stream*. Create up to 100 streams.
Post Pinning	Highlight high-impact posts that otherwise get buried in a busy feed by pinning them to the top of group and topics feeds.
Draft Posts	Now those long, thoughtful posts are automatically saved as drafts to the My Drafts feed every seven seconds. Review, edit, post, or delete drafts.
Record Linking	Easily link to recently viewed records, right from your post. Start with a forward slash (/), and begin entering the record name. A selection list shows your recently viewed records. Choose one to add a link to it to your post. Before you can link to records from a post or comment, your Administrator must contact Salesforce Support. Ask Salesforce to enable and set up the Quill editor for composing Rich Text content in Chatter.
Reports and Dashboards	Get more from your data. The report run page is easy to read and filter. Animated, interactive charts bring your company's data to life. And a new dashboard editor supports flexible layouts and components that span columns and rows.
Favorites	Create shortcuts to frequently accessed pages, including records, lists, and groups.

Feature	Why It's Cool
Search	Find the right records faster and act on search results with AI-powered Einstein Search. Also, benefit from improved global search and lookup search. Search results include instant results, top results, and recent records.
Lightning Apps	Easily switch between collections of related objects, Visualforce and Lightning pages, and utilities such as Sales Dialer. Rally teams around your brand and important initiatives with custom logos and colors for each app.
Lightning Console Apps	Navigate and work more productively with optimized workflows and a three-column layout. View and edit multiple records at the same time and quickly access utilities such as Sales Dialer and Open CTI.
Salesforce Mobile App	Unlock a new level of productivity, personalization, and speed for every mobile user. The new Salesforce Mobile app delivers a consistent experience between desktop and mobile, with access to the same data and the same customizations.
Flow Builder	Guide users through multi-step processes and associate flows with records using Salesforce automation tools.
Setup Tree and Object Manager	Navigate setup pages with a simplified organization and a cleaner look and feel. Use the Object Manager, which combines all standard and custom objects into a single list that's easier to search.
Lightning App Builder	Create custom pages for Lightning Experience and the Salesforce Mobile app with clicks instead of code. Define columns and tabs and position Lightning components exactly where you want them. Use filters to control when components appear.
Service Setup Flows	Get up and running quickly with Lightning Service Console using service-specific setup flows. These flows walk you through setting up Email-to-Case, integrating with Twitter and Facebook, creating an Experience Builder site, and enabling Lightning Knowledge, Omni-Channel, and Chat.
Sales Dialer	Use phone features without ever leaving Salesforce. Make and receive calls, add call notes, and log call information with ease. *Available for an extra cost.*
Salesforce Einstein	Supercharge the productivity of your sales, service, and marketing teams with AI. Using key predictions, intelligent recommendations, and timely automation, everyone can work smarter and faster. *Some Einstein features are available for an extra cost.*
Sales Engagement	Accelerate your inside sales process with a high-productivity workspace. Sales managers can create custom sales processes that guide sales reps through handling prospects. Reps can access productivity-boosting features like the Work Queue, email templates, call scripts, and more. Plus, you can track how prospects respond to the handling you customize. Sales Engagement gives your sales teams everything necessary for handling prospects in a fraction of the time it took before. *Available for an extra cost.*

SEE ALSO:

Video: Let's Take Lightning Experience for a Spin

Salesforce Containers Across Lightning Platform

When you use Salesforce, you interact with a user interface that's backed by a robust application layer. This layer runs on the Lightning Component Framework, which comprises services like the navigation service, Lightning Data Service, and Lightning Design System.

As part of this application layer, Base Components and Standard Components are the building blocks that enable admins to configure their user interfaces via the App Builder and Experience Builder. Standard Components are typically built up from one or more Base Components, which are also known as Lightning Components. You can build Lightning Components using two programming models: the Lightning Web Components model, and the Aura Components model.

Lightning Platform is a critical part of a growing number of containers.

- Lightning Experience
- The new Salesforce mobile app
- Experience Builder sites
- Outlook Integration and Gmail Integration
- Lightning Out and Lightning Components for Visualforce
- Standalone Lightning App
- Service Cloud Embedded Service

Here's what you can expect of the support for components and services across the list of containers. Features and services marked by ❌ aren't supported for the given container. Features and services marked by ⚠️ denotes support with known limitations. Features and services marked by ✅ denotes full support.

	Lightning Experience	Salesforce App	Experience Builder Sites	Outlook Integration/Gmail Integration	Lightning Out	Standalone Lightning App	Service Cloud Embedded Service
Navigation Service	✅	✅	⚠️	⚠️	❌	❌	❌
Lightning Data Service	✅	✅	✅	✅	✅	✅	❌

	Lightning Experience	Salesforce App	Experience Builder Sites	Outlook Integration/Gmail Integration	Lightning Out	Standalone Lightning App	Service Cloud Embedded Service
Lightning Design System	✅	✅	⚠️	✅	✅	✅	❌
Base Components	✅	⚠️	⚠️	⚠️	⚠️	⚠️	⚠️
Standard Components	✅	⚠️	⚠️	⚠️	❌	❌	❌
Builders	✅	✅	⚠️	✅	❌	❌	❌
Flows	✅	✅	✅	⚠️	⚠️	⚠️	⚠️
Security	✅	✅	⚠️	⚠️	⚠️	⚠️	⚠️
Actions	✅	⚠️	⚠️	⚠️	❌	❌	❌
Record Detail Customization	✅	⚠️	✅	⚠️	⚠️	⚠️	❌

Build powerful user interfaces using the following components and services with varying levels of support.

Navigation Service

Created with extensive routing, deep linking, and login redirection, Salesforce's navigation service powers app navigation, state changes, and refreshes. Navigation service isn't available in Lightning Out, standalone Lightning apps, and Service Cloud Embedded Service. For more information on the navigation service, see the Lightning Components Developer Guide.

Lightning Experience and the Salesforce Mobile App

Navigation service is supported for Lightning Experience and the Salesforce mobile app. You can implement navigation service in your custom Lightning apps using `lightning:navigation` (Aura) or `lightning-navigation` (Lightning web component), enabling navigation to a page or component easily using page references. Furthermore, the `lightning:isUrlAddressable` (Aura) interface or the `lightning/navigation` (Lightning web component) module enables you to generate a user-friendly URL for a Lightning component.

Experience Builder Sites

Support for navigation service in Experience Builder sites is available as of Spring '19, similar to Lightning Experience, and the Salesforce mobile app. However, page reference support is limited.

Outlook Integration and Gmail Integration

Since Outlook Integration and Gmail Integration are presented in a panel, navigation support is limited to force:navigateToList and force:navigateToSObject only. These events have been superseded by `lightning:navigation` except in the context of Outlook Integration and Gmail Integration.

Lightning Web Components doesn't currently support Outlook Integration and Gmail Integration.

Lightning Data Service

Built on top of the User Interface API, Lightning Data Service enables you to load, create, edit, or delete a record in your component without requiring Apex code. Lightning Data Service improves performance and data consistency across components. It's used by Aura components such as `lightning:recordForm`, `lightning:recordEditForm`, `lightning:recordViewForm`, and `force:recordData`.

In Lightning web components, use `lightning-record-form`, `lightning-record-edit-form`, and `lightning-record-view-form`. `force:recordData` corresponds to the `lightning/uiRecordApi` module.

Lightning Data Service works across all containers except Service Cloud Embedded Service. For more information, see the following documentation.

- User Interface API Developer Guide
- Lightning Aura Components Developer Guide
- Lightning Web Components Developer Guide

Lightning Design System

Build user interfaces easily using Lightning Design System, which includes component blueprints, markup, CSS, icons, and fonts. You can match your design with Salesforce design guidelines across all containers except in Service Cloud Embedded Service. Lightning Design System is also available in Lightning Out apps and standalone apps when your app extends `force:slds`. For more information, see the Lightning Design System website.

Experience Builder Sites

SLDS support in Experience Builder sites is similar to Lightning Experience but some values in Experience Builder sites might differ in terms of tokens, classes, and icons. For example, Lightning Experience overrides some SLDS tokens. In Experience Builder sites, some SLDS tokens are tied to branding properties and can be changed based on configuration in the Experience Builder.

Base Lightning Components

The building blocks for all UI across Lightning Platform, Base Lightning Components range from a simple button to a highly functional data table and can be written as an Aura component or a Lightning web component. Some components, such as `lightning:datatable` (Aura) and `lightning-datatable` (Lightning web component), aren't responsive and doesn't work correctly on mobile devices. The same applies in Outlook Integration and Gmail Integration, which display the components in a narrow panel.

Data-bound components like `lightning:recordForm` (Aura) are supported in Lightning Out and standalone Lightning apps with some limitations. For example, the lookup field isn't supported in mobile. Hover detail panels on lookup fields are also not supported outside of Lightning Experience, the Salesforce mobile app, and Experience Builder sites. Base Lightning Components are supported in Service Cloud Embedded Service through the `lightningsnapin:prechatUI` and `lightningsnapin:minimizedUI` interfaces, with similar limitations on data-bound components as Lightning Out and standalone Lightning apps.

The Component Library showcases all available Base Lightning Components in the `lightning` namespace. For more information, see the Component Library.

Standard Components

Lightning pages are made up of Standard Components, which in turn are composed of Base Lightning Components. You can drag-and-drop Standard Components in tools like Lightning App Builder and Experience Builder, which enables you to configure user interfaces in Lightning Experience, the Salesforce mobile app, Experience Builder sites, Gmail Integration, and Outlook Integration.

In the App Builder, Standard Components include the Chatter Publisher component and the Dashboard component. For example, the Chatter Publisher consists of an input rich text field made up of tabs and button icons. For more information, see Standard Lightning Page Components in Salesforce Help.

In Experience Builder, Standard Components provide rich functionality to help you build a custom Experience Builder site quickly; for example, the Dashboard, Flow, Record Detail components, and many others. For more information, see Which Components Can I Use with Each Template? in Salesforce Help.

Some Standard Components aren't responsive and don't work correctly on mobile devices, in Experience Builder sites, Outlook Integration, and Gmail Integration.

Builders

Builders refer to the declarative tools, such as Lightning App Builder and Experience Builder, which create pages for different containers, such as Lightning Experience or Experience Builder sites. No declarative tools are currently available for Lightning Out, standalone Lightning apps, and Service Cloud Embedded Service.

Lightning App Builder

Lightning App Builder lets you build and customize interfaces for Lightning Experience, the Salesforce mobile app, Outlook Integration, and Gmail Integration. If you have custom Aura components, you can use them in Lightning App Builder by implementing the `flexipage:availableForAllPageTypes`, `flexipage:availableForRecordHome`, or `clients:availableForMailAppAppPage` interface, depending on your requirements. You can also surface custom Lightning web components in Lightning App Builder. For more information, see the Lightning Web Components Developer Guide.

Also, you can create and update Lightning pages via Lightning App Builder. Lightning pages include app, Home, and record pages. App and Home pages are similar. For mobile, you can use app pages but there's no support for Home pages and record pages yet. Using record pages in mobile is available as part of the Lightning on Mobile pilot in Summer '19. You can create these pages via Lightning App Builder for Lightning Experience and the Salesforce mobile app. For more information, see Lightning Pages in Salesforce Help.

Experience Builder

For Experience Builder sites, you can use the Experience Builder to build and customize sites easily. Custom Aura components can be surfaced in Experience Builder by implementing the `forceCommunity:availableForAllPageTypes` interface. You can also surface a custom Lightning web component in Experience Builder. For more information, see the Lightning Web Components Developer Guide.

Additionally, Experience Builder supports custom pages, enabling you to add custom record detail, list, and related list pages. For more information, see Create Custom Pages with Experience Builder in Salesforce Help.

Flows

Flows include the `lightning:flow` Aura component and local actions. There are two ways to put a Lightning component inside a flow—as an action or in a screen using the `lightning:availableForFlowActions` Aura interface. Local actions let you perform actions in the browser. Lightning Web Components doesn't currently support flows. See Let Flows Execute Local Browser Actions in Salesforce Help.

Local actions and screen components are supported in flows across Lightning Experience, the Salesforce mobile app, and Experience Builder sites. Outlook Integration, Gmail Integration, and Lightning Out supports the Flow Lightning component and local actions for direct data queries only. Web Snap-Ins supports both Flow Lightning component and local actions.

Also, flows are supported in the Field Service Mobile App. You can access a flow in the Field Service mobile app with either an app extension or quick action. See Add Flows to the Field Service Mobile App in Salesforce Help.

Security

Lightning security measures are implemented through Lightning Locker and Content Security Policy (CSP).

Lightning Locker prevents access to unsupported APIs and functions, and is observed across all containers.

CSP prevents loading content whose origin is outside an org and not from a CSP trusted site. Strict CSP restricts the use of inline JavaScript and script tags, and is enabled by default. CSP support in Experience Builder sites includes several options for script security levels. CSP support in Lightning Experience differs from that in Experience Builder sites, which includes several options for script security levels. In Spring '19, Strict CSP becomes the standard CSP setting for all new Experience Builder sites. For more information, see the Experience Builder Sites Developer Guide.

Only Lightning Locker is supported in:

- Outlook Integration
- Gmail Integration
- Lightning Out
- Standalone Lightning apps
- Service Cloud Embedded Service

For more information, see:

- What is Lightning Locker?
- Content Security Policy Overview

Actions

Actions refer to global quick actions, action overrides, and mass quick actions. Global quick actions let you log call details, create or update records, or send email, accessible via the global actions menu. Global create actions enable you to create object records, but the new record has no direct relationship with other records. Action overrides let you override the behavior of standard buttons like New, View, or Edit. Mass quick actions are added to an object's search layout and can only be performed on creating and updating a record. Here's where actions are supported.

- Lightning Experience supports all action types.
- The Salesforce mobile app supports only global quick actions and action overrides are supported. Mass actions aren't supported.
- Experience Builder sites support global and quick actions only.
- Outlook Integration and Gmail Integration support global quick create actions only; overrides and mass actions aren't supported.
- Lightning Out, standalone Lightning apps, and Service Cloud Embedded Service don't support actions at all.

For more information, see:

- Action Types
- Standard Actions and Overrides Basics
- Set Up a Mass Quick Action

Record Detail Customization

Record data is presented on record detail pages. In Lightning Experience, record pages are served by metadata—layout, field-level security, and CRUD—and can include custom Lightning components. In Experience Builder sites, record detail support is similar to Lightning Experience. Like the Lightning App Builder, the Experience Builder provides the Record Detail component for you to drag-and-drop onto a site.

Record detail pages on the Salesforce mobile app are driven by record metadata; custom components aren't supported. The Lightning on Mobile Pilot in Summer '19 enables you to use Lightning record pages like in desktop, which includes support for custom components.

Outlook Integration and Gmail integration support record pages served by metadata.

Record detail customization is available in Lightning Out and standalone Lightning apps via a Lightning component like `lightning:recordForm`(Aura) and `lightning-record-form` (Lightning web component) with some limitations. For example, lookup fields in Lightning Out and standalone apps don't display the record detail popover.

Other components that provide record detail customization include those that implement Lightning Data Service, as discussed in the Lightning Data Service section.

SEE ALSO:

  Lightning Web Components Dev Guide: Base Components

Evaluate Lightning Experience Benefits and Readiness

As you prepare for the transition to Lightning Experience, there are three issues to evaluate: how does the change benefit your company, what work is needed to prepare for the change, and how much will it cost. This is the stage to make the case for moving to Lightning Experience by calculating the return on investment your company will get and defining what your Lightning Experience implementation will look like. Use the information you collect in this stage to define business and technical requirements and the level of effort for your rollout.

Lightning Experience has good parity with Sales Cloud features in Salesforce Classic and is quickly catching up on Service Cloud features, closing gaps with each new release. Part of your evaluation is to identify how important upcoming features are to your business needs.

Keep in mind that you can roll out Lightning Experience over time, enabling different groups of users as you go. This flexibility means you can move your Sales teams now while leaving 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.

Make the Case for Lightning Experience

Lightning Experience is a more intuitive and efficient interface that helps users spend less time searching for information and more time selling and solving customer problems. But the benefits go beyond a better user interface. The UI framework in the Lightning Platform empowers IT and business teams to quickly build and launch new apps and services with clicks instead of code. Which means your company has the flexibility and independence to revamp processes and features to keep up with changes in your business. Make the case for your leadership by showing how moving to Lightning Experience can realize your business goals and improve your company's bottom line. We have some resources to help.

Compare Lightning Experience and Salesforce Classic

Here are some highlights of how Lightning Experience compares with what you're used to in Salesforce Classic. The list includes features that are available only in Lightning Experience.

What's the Fate of Existing Salesforce Customizations?

We've worked hard to respect your existing customizations in Lightning Experience. Many of your point-and-click and programmatic implementations 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. To get a detailed analysis of your org's customizations, run the Lightning Experience Readiness Check. In the meantime, here's an overview of issues to consider.

Check Your Org's Readiness for Lightning Experience

Analyze how well-prepared your org is for the transition to Lightning Experience by running the Lightning Experience Readiness Check. This tool produces a personalized Readiness Report that shows which of your users will benefit right away, and how to adjust your implementation for Lightning Experience. Most existing features and customizations just work in Lightning Experience, so you may be delighted to learn there's nothing significant to address. The report is a valuable resource that helps you focus on updates that smooth the way as you roll out Lightning Experience.

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." If you're assigned to the standard System Administrator profile, you can switch to Lightning Experience at any time. But if you don't have access yet, the Preview feature in the Lightning Experience Transition Assistant lets you explore how your production org behaves in the new interface while you're working in Salesforce Classic. You can see exactly how your real data, business processes, and customizations work, and you can take Lightning Experience-only features for a test drive to see how they benefit your teams. You can also use Preview to test features and customizations that the Lightning Experience Readiness Check doesn't evaluate.

SEE ALSO:

Supported Editions and User Licenses for Lightning Experience

What are the Gaps Between Lightning Experience and Salesforce Classic

Make the Case for Lightning Experience

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EDITIONS

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

- Review the Forrester Consulting reports on the total economic impact of transitioning to Salesforce Lightning for Sales Cloud and Salesforce Lightning for Service Cloud. These studies analyze the cost savings and business benefits from moving to Lightning Experience and the Lightning Platform.

- Run the Business Assessment Calculator for the projected benefits of moving your org to Lightning Experience.

- Check out your org's Lightning Experience Readiness Report for some predictions about the benefits and productivity improvements you can realize.

Common reasons for investing in Lightning Experience include delivering a better user experience, adopting features and capabilities that solve business problems, improving processes, and getting access to Lightning innovation and faster app development technology. The case is even more compelling if you can tie the transition to a key business driver like the launch of a new sales program or a major transformation initiative.

Review Current Business Processes

The move to Lightning Experience is an opportunity to simplify and consolidate your business processes, address issues that are affecting user adoption, and otherwise clean house. As you evaluate your org for Lightning Experience, look for the places where you can make your users happier and more productive instead of simply moving over everything in your current implementation.

Review Current Business Processes

The move to Lightning Experience is an opportunity to simplify and consolidate your business processes, address issues that are affecting user adoption, and otherwise clean house. As you evaluate your org for Lightning Experience, look for the places where you can make your users happier and more productive instead of simply moving over everything in your current implementation.

Here are some things to consider:

- Which workflows and processes are critical to day-to-day operations? Check in with your teams for their input.

- Are any of your processes overly complicated? Look for ways to reduce clicks and eliminate unnecessary steps.

- Are there multiple ways to accomplish the same outcome? Pick the best approach and leave the others behind.

- What are the pain points in your org and are they addressed by Lightning Experience features? Prioritize setting up the features that solve the biggest problems.

Compare Lightning Experience and Salesforce Classic

Here are some highlights of how Lightning Experience compares with what you're used to in Salesforce Classic. The list includes features that are available only in Lightning Experience.

📝 **Note:** These tables aren't a complete list of Salesforce Classic features that aren't available in Lightning Experience. A great way to see how your org's classic implementation stacks up in Lightning Experience is to run the Lightning Experience Readiness Check. You get a report that evaluates many of your org's features and customizations. The report also provides actionable advice that you can use to develop your deployment plan.

Salesforce Data

Feature	Lightning Experience	Salesforce Classic
Sales data for: - Accounts - Campaigns - Contacts - Contracts - Leads - Opportunities - Orders - Person Accounts - Price Books - Products - Quotes	✓	✓
Calendar, Events, Tasks	✓	✓
Service data for: - Assets	✓	✓

Feature	Lightning Experience	Salesforce Classic
• 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	✔	
Key deals	✔	
Tasks	✔	✔
Events[1]	✔	✔
Calendar[1]	✔	✔
Feed and publisher	✔	✔
Items to approve	✔	✔
Customizable dashboards	✔	✔
Customizable home page components	✔	✔

[1] In Lightning Experience, Home show 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	✔	
Path	✔	
Activity timeline	✔	

Feature	Lightning Experience	Salesforce Classic
Contacts to Multiple Accounts	✔	✔
Account Logos	✔	
Automated Account Fields	✔	
Notes	✔	
"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	✔	✔
Add campaign members from reports	✔	✔

Leads

Feature	Lightning Experience	Salesforce Classic
Workspace page layout	✔	

Feature	Lightning Experience	Salesforce Classic
Activity timeline	✔	
Path	✔	
News	✔	
Notes	✔	
Change lead owner to a queue	✔	✔
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	✔	✔
Opportunity deal change highlights	✔	

Salesforce Einstein

Feature	Lightning Experience	Salesforce Classic
Analytics		
Einstein Discovery	✔	✔
Chatter		

Feature	Lightning Experience	Salesforce Classic
Einstein Recommendations	✔	✔
Community		
Einstein Related Articles	✔	✔
Einstein Feed Search	✔	✔
Customization		
Einstein Prediction Builder: Setup	✔	
Einstein Prediction Builder: Predictions on Records	✔	✔
Einstein Next Best Action: Strategy Builder	✔	
Einstein Next Best Action: Recommendations	✔	✔
Development		
Einstein Language	✔	✔
Einstein Vision	✔	✔
Sales		
Einstein Activity Capture	✔	
Einstein Lead Scoring	✔	✔
Einstein Opportunity Scoring	✔	✔
Einstein Forecasting	✔	✔
Einstein Opportunity Insights	✔	
Einstein Account Insights	✔	
Einstein Automated Contacts	✔	
Search		
Einstein Search	✔	
Service		
Einstein Bot Builder: Setup	✔	
Einstein Bot Builder	✔	✔
Einstein Case Classification: Setup	✔	
Einstein Case Classification: Agent Console	✔	✔

Collaborative Forecasts

Feature	Lightning Experience	Salesforce Classic
Forecasting on: • Opportunity splits • Overlay splits • Custom currency fields on opportunities • Product families	✔	✔
Custom measure (currency and number) forecasts on Opportunity, Opportunity Product, Opportunity Split, and Line Item Schedule	✔	
Revenue and quantity forecasts	✔	✔
Product and schedule date forecasts	✔	
Territory forecasts	✔	
Forecast sharing	✔	
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 the product family forecasts feature 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	✔	
Timestamp showing refresh time and date	✔	
All-zero rows hidden for all forecast types	✔	
Adjust your own product family forecasts	✔	
Opportunity split details in the opportunities list		✔
Adjustable column width	✔	✔
Quota attainment information	✔	✔
Jump to the forecasts of users you have access to view	✔	✔

Feature	Lightning Experience	Salesforce Classic
Forecasts Settings	✔	
Most Likely forecast category	✔	

Data.com

To create a web tab, see the knowledge article Display the Data.com tab in Lightning Experience.

Feature	Lightning Experience	Salesforce Classic
Data.com Prospector: Search for companies and import them as accounts	Accessed via the Get More Accounts button on the Accounts list view. You can filter on the following fields: • Annual Revenue • Company or Website • Country or Territory • Location Type • State To filter on other fields, use a web tab.	Accessed via the Data.com tab or Search Global Ultimate DUNS button on D&B Company records.
Data.com Prospector: Export companies or contacts to a .csv file	Web tab required.	Accessed via the Data.com tab.
Data.com Prospector: See key company insights on accounts	Accessed via the Get More Insights button on accounts.	Accessed via the Prospecting Insights button on accounts.
Data.com Prospector: See key company insights on opportunities	Accessed via the Get More Insights button on opportunities.	Not available.
Data.com Prospector: Prospect for accounts within the same corporate hierarchy	On accounts and opportunities, accessed via the Get More Insights button (Data.com Insights component) or via the Company Hierarchy component.	Accessed via the Company Hierarchy button on accounts.
Data.com Clean: Administrative settings	Not available. Use Salesforce Classic to administer Clean jobs and configure Clean settings.	Administer Clean jobs, and configure Clean settings.
Data.com Clean: Clean accounts with company data	Bulk cleaning: Clean jobs for accounts. Manual cleaning: Available using the Company Info for Accounts data integration rule (Premium Clean required).	Bulk cleaning: Clean jobs for accounts. Manual cleaning: Clean button on accounts.
Data.com Clean: View and refresh D&B company records	Accessible via a link on an account or lead. A Salesforce Classic tab opens. The tab doesn't interrupt the user's Lightning Experience session.	Accessible via a link on accounts or leads and from the D&B Companies tab.

Customer Service

Feature	Lightning Experience	Salesforce Classic
Assets	✔	✔
Case Assignment Rules	✔	✔
Case Comments	✔	✔
Case Feed Filters	✔	✔
Case Teams	✔	✔
Console[1]	✔	✔
Einstein Bots and Case Classification[2]	✔	✔
Entitlements[3]	✔	✔
Field Service	✔	✔
Knowledge[4]	✔	✔
Lightning Flow for Service	✔	
Chat	✔	✔
Messaging	✔	
Macros[5]	✔	✔
Milestones—Case[6]	✔	✔
Milestones—Object	✔	✔
Omni-Channel	✔	✔
Open CTI	✔	✔
Products	✔	✔
Quick Text	✔	✔
Service Contracts	✔	✔
Service Set-up Flows for:	✔	

- Experience Cloud sites
- Email-to-Case
- Facebook and Twitter
- Help Center
- Knowledge
- Chat
- Messaging
- Omni-Channel

Feature	Lightning Experience	Salesforce Classic
Embedded Service for Web[7]	✔	✔
Social Customer Service	✔	✔
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] Einstein Bots and Einstein Case Classification must be set up in Lightning Experience.

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

[4] Enabling Lightning Knowledge changes your org's data model to use record types rather than article types. In Lightning Knowledge, you can also use standard Salesforce sharing, rather than data categories, to control article access. To move from Salesforce Classic Knowledge to Lightning Knowledge, use the Lightning Knowledge Migration Tool. Test your data migration in a full-copy sandbox org before enabling Lightning Knowledge in your production org. After you enable Lightning Knowledge, you can't disable it. Lightning Knowledge works differently, and doesn't yet have full parity with Knowledge in Salesforce Classic. Learn more.

[5] Conditional expressions in macros are available in Lightning Experience only.

[6] In Lightning Experience, the Business Hours field isn't available on the Case Milestones Case related list.

[7] Embedded Service for Web setup is available in Lightning Experience only. However, embedded components can go anywhere on your website.

Reports

Feature	Lightning Experience	Salesforce Classic
Enhanced report charts	✔	
Row-level formulas (beta)	✔	
Hide totals and subgroups from report view	✔	
Interactive filters when viewing reports	✔	
Report Builder	✔	✔
Currency selector in the Report Builder	✔	✔
Product standard filter for the **Opportunities with Contact Roles and Products** report type in the Report Builder		✔
Select a campaign option on the **Show Me** filter for Campaign report types in the Report Builder		✔
Bucket fields	✔	✔
Custom summary formulas	✔	✔
Matrix, Summary, Tabular report formats	✔	✔

Feature	Lightning Experience	Salesforce Classic
Stacked summaries in the Matrix report format	✔	✔
Column (non-stacked) summaries in the Matrix report format	✔	
Role hierarchy filters	✔	✔
Create report folders and subfolders	✔	
Joined reports	✔	✔
Pie charts		✔
Schedule report refreshes[1]	✔	✔
Follow reports		✔
Report notifications[1]	✔	✔
Export reports	✔	✔
Historical tracking reports	✔	✔
Conditional formatting	✔	✔
Favorites	✔	

[1]Available in Lightning Experience by subscribing to a report.

Dashboards

Feature	Lightning Experience	Salesforce Classic
Display more than 3 columns	✔	
Tables with up to 10 columns and 200 rows	✔	
Dashboard Builder	✔	✔
Flexible layouts	✔	
Themes and palettes	✔	
Create dashboard folders and subfolders	✔	
Filtered dashboards	✔	✔
Dynamic dashboards	✔	✔
Schedule dashboard refreshes[1]	✔	✔
Post dashboard components to feeds	✔	✔
Visualforce components		✔
Favorites	✔	

[1] To get updates to dashboards in Lightning Experience on a schedule, subscribe to them. Dashboards scheduled in Salesforce Classic run as expected in Lightning Experience.

List Views

Feature	Lightning Experience	Salesforce Classic
Charts	✔	
Create and modify filters	✔	
Search for a list view	✔	
Find data with the list view search bar	✔	
Pin your favorite list view as your default list	✔	
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.

Search

Feature	Lightning Experience	Salesforce Classic
General		
Einstein Search (global search default)	✔	
Global Search (without Einstein Search)		✔
Advanced Search		✔
Sidebar Search		✔
Search any object from anywhere	✔	
Search All button		✔
Search results from external sources	✔	✔
Search results from external sources on the Top Results page	✔	

Feature	Lightning Experience	Salesforce Classic
Instant Results		
Instant results appear in a dropdown list when search box is selected (you've not started typing)	✔	
Shortcuts to recent items	✔	✔
Matches for recently accessed items as you type your search term	✔	✔
Matches for items not recently accessed as you type your search term	✔	
Search Results		
See Top Results from your most frequently used objects on one page	✔	✔
Pin objects on the search results page		✔
See the number of results for each object searched	✔	✔
Filter and sort search results[1]	✔	✔
Adjustable columns	✔	
See when spelling correction was done	✔	
Value-based lookup	✔	✔

[1]In Lightning Experience, you can filter search results for these objects: accounts, cases, contacts, dashboards, files, Knowledge articles, leads, notes, opportunities, people, tasks, and custom objects.

Other Features and Products

Feature	Lightning Experience	Salesforce Classic
Custom org brand images and colors	✔	
Custom branding of Salesforce apps	✔	
Personalized Navigation Bar	✔	✔
Favorites	✔	
Activities-related composer windows	✔	
Create and edit records	✔	✔
Inline editing record detail fields	✔	✔
Inline editing in lists	✔	✔
Enterprise Territory Management	✔	✔

Feature	Lightning Experience	Salesforce Classic
Experience Cloud sites[1]	✔	✔
Partner Portals		✔
WDC		✔

[1] To create or disable Experience Cloud site users, log in as a site user, and use delegated administration, switch to Salesforce Classic.

SEE ALSO:
  Lightning Experience Roadmap
  What are the Gaps Between Lightning Experience and Salesforce Classic

What's the Fate of Existing Salesforce Customizations?

We've worked hard to respect your existing customizations in Lightning Experience. Many of your point-and-click and programmatic implementations 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. To get a detailed analysis of your org's customizations, run the Lightning Experience Readiness Check. In the meantime, here's an overview of issues to consider.

Salesforce Apps and the Navigation Bar

The Salesforce apps you created in Salesforce Classic work in Lightning Experience without any modifications. But users can't personalize the objects, tabs, and other items that appear in the Lightning Experience navigation bar until you upgrade the Classic app. It's easy to upgrade Classic apps to Lightning apps with the App Manager in Setup.

The other advantage to upgrading apps is that you can then customize them with:

- A unique color and logo
- Standard and custom objects
- Lightning component tabs
- Visualforce tabs
- Lightning page tabs

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 and the Salesforce 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 seven fields from your current compact layout. The Salesforce mobile app shows up to ten fields from the compact layout.

Provide instant access to productivity tools, like integrated voice, by adding a utility bar to Lightning apps. The utility bar displays in the Lightning Experience footer.

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 the Salesforce mobile app, you know that all action types and buttons are co-mingled on the 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 Salesforce Mobile 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 action menu in the highlights panel.
- Object-specific activities-related actions, such as Log a Call, New Event, New Task, and Email, display in the composer on the Activity tab if you're using the activity timeline. Otherwise they appear in the activities related lists.
- Standard Chatter actions appear in the composer on the Chatter 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.

See Actions in Lightning Experience.

Custom Buttons

Custom buttons and links that use a JavaScript content source aren't supported in Lightning Experience. 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 and most of your existing Visualforce pages work without any revisions needed. But things have moved around in the new interface, so do some testing to confirm that your Visualforce pages behave as expected. 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 should 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. But it's easy to assign the Lightning Experience stylesheets so pages have classic styling in Salesforce Classic and Lightning styling in Lightning Experience.
- We recommend checking out the Salesforce Lightning Design System (SLDS) for 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.

To evaluate the status of your Visualforce pages for Lightning Experience, check out Prepare Your Visualforce Pages for Lightning Experience.

What about UI customization? The Lightning Component framework is our UI framework for developing dynamic web apps for both desktop and mobile devices. You can use it or Visualforce in your new projects.

Canvas

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 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. 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 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* and *Powered by Lightning* certification. Apps that are Lightning Ready work in Lightning Experience and fit in with other apps and pages in the interface. 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 apps that aren't certified as Lightning Ready in Salesforce Classic.

Check Your Org's Readiness for Lightning Experience

Analyze how well-prepared your org is for the transition to Lightning Experience by running the Lightning Experience Readiness Check. This tool produces a personalized Readiness Report that shows which of your users will benefit right away, and how to adjust your implementation for Lightning Experience. Most existing features and customizations just work in Lightning Experience, so you may be delighted to learn there's nothing significant to address. The report is a valuable resource that helps you focus on updates that smooth the way as you roll out Lightning Experience.

📝 **Note:** Starting in October 2019, the Readiness Check report is stored in your Salesforce files instead of being attached to an email.

📝 **Note:** The Lightning Experience Readiness Check is a standalone application that lives outside your ordinary Salesforce environment. When you use it, your account will be used to pull relevant data from your Salesforce org into Heroku, where the data will be processed to provide the Readiness Check's functionality. Heroku is another service offered by Salesforce on a separate infrastructure. The Readiness Check may also use further downstream processors, including third parties. Tell me more about Heroku.

Some Readiness Reports also include ROI calculations to help you make the case to your leadership and stakeholders, and an estimated level of effort for your rollout. Plus you get access to a free group session with a Lightning Experience expert for advice on next steps.

EDITIONS

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

The Readiness Check and the Readiness Report are available in English only.

USER PERMISSIONS

To run the Lightning Experience Readiness Check
- Customize Application

  AND

  Modify All Data

Running the Readiness Check doesn't change your Salesforce implementation. Other Salesforce admins or users aren't alerted when you run the tool.

> 💡 **Tip:** We're continually updating and expanding the scope of what the Readiness Check evaluates, so we recommend rerunning the tool occasionally. If you're in the early stages of your transition, run the check every 2-3 months to see what's new. If you're actively rolling out Lightning Experience, run the check monthly, if not more often.

Who Can Run the Lightning Experience Readiness Check?

Learn what's required to run the Readiness Check and the factors that control the availability of certain sections in the Readiness Report.

What Does the Lightning Experience Readiness Check Evaluate?

See how to use your Readiness Report for estimates on the ways Lightning Experience can improve user productivity and for a projected level of effort to roll out Lightning Experience. Learn how the report assesses the readiness of your org's user profiles, and which features and customizations are evaluated. You can use these details to develop your rollout plan and prioritize what to focus on.

How Does the Lightning Experience Readiness Check Count User Impact?

For some of your features, the Readiness Report provides details on how many users are working with the feature in Salesforce Classic, and how often. The Readiness Check bases user counts on different types of data or metadata, depending on what's available for each feature.

Kick Off the Lightning Experience Readiness Check

To evaluate the readiness of your users and many of your org's features and customizations for Lightning Experience, run the Readiness Check. Access the tool from the Lightning Experience Transition Assistant.

SEE ALSO:

Get Started with the Lightning Experience Configuration Converter

What are the Gaps Between Lightning Experience and Salesforce Classic

Who Can Run the Lightning Experience Readiness Check?

Learn what's required to run the Readiness Check and the factors that control the availability of certain sections in the Readiness Report.

Requirements to Run the Readiness Check

The Readiness Check is available to admins in sandbox and production environments, with these requirements:

- The org must be set to a Fully Supported Language.
- If your org has IP restrictions, add these IP addresses to an allowlist for your org so admins can access the tool:
  - 52.2.2.209
  - 52.203.195.34
  - 52.200.207.131
  - 52.72.119.132

For Enterprise, Performance, Unlimited, and Developer editions, see Restrict Login IP Addresses in Profiles in Salesforce Help to add the IP addresses to the user profile of the person who's running the report.

<div style="float:right; border-left:1px solid #ccc; padding-left:1em;">

EDITIONS

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

The Readiness Check and the Readiness Report are available in English only.

</div>

For Professional Edition, see Modify Session Security Settings in Salesforce Help to add the IP addresses to the Login IP Range for the org.

Internet Browsers

The Readiness Check isn't supported in Internet Explorer 11.

Availability of ROI and Effort Estimates in the Readiness Report

Admins with Sales Cloud licenses see estimates on how Lightning Experience can improve user productivity. Predictions are based on your current Salesforce usage and the average return on investment anonymously reported by other Salesforce customers.

Some admins with Sales Cloud licenses also see an estimate on the effort to roll out Lightning Experience, including the time to address issues identified in the report. Predictions are based on the average number of hours that specific rollout tasks have taken customers. If you don't see this estimate in your Readiness Report, register for a free group session with a Lightning expert. You get an invitation to register after you run the Readiness Check.

What Does the Lightning Experience Readiness Check Evaluate?

See how to use your Readiness Report for estimates on the ways Lightning Experience can improve user productivity and for a projected level of effort to roll out Lightning Experience. Learn how the report assesses the readiness of your org's user profiles, and which features and customizations are evaluated. You can use these details to develop your rollout plan and prioritize what to focus on.

> 📝 **Note:** The Readiness Check only has access to the metadata in your implementation. The tool evaluates supporting data only and not the data within your records or other content you add to Salesforce.

EDITIONS

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

The Readiness Check and the Readiness Report are available in English only.

Predict Your Rollout Benefits and Effort

Need help influencing stakeholders and executives to support the move to Lightning Experience?
For some Salesforce admins with Sales Cloud licenses, the Readiness Check can make educated guesses about:

- The benefits and productivity improvements from moving to Lightning Experience
- The time it might take to roll out Lightning Experience

Why Move to Lightning Experience?

Salesforce surveyed customers who already made the switch to Lightning Experience to understand the [...] company. We compared your Salesforce usage with the average return on investment reported by Sales[...] during the study.

Based on how you're using Salesforce today, we estimate that you could...			Calculation
Increase your sales win rates by 21%		6 more deals per year	Your closed-won [...] the last year X 21[...] in closed deals, a[...] surveyed custome[...]
Decrease reps' average close time for deals by 23%		5 less days to close deals	Average number [...] opportunity creat[...] for all opportuni[...] 23% average inc[...] calculation, acco[...] customers
Increase your sales team's lead conversion rate by 22%		25 more opportunities per year	Your total created [...] the last year X 22[...] in created oppor[...] to surveyed custo[...]
Increase your sales team's productivity and collaboration by up to 25%			On average, customers who made the switch saw a 3[...] end user user productivity, according to the Forrester [...] The Total Economic Impact™ of Salesforce Lightning.

Your Rollout Effort

To estimate your effort, we established an average for the number of hours that specific Lightning Experience transition tasks have taken. Then we compared our averages with your report results.

The estimate assumes that you've educated yourself about Lightning Experience and how to tackle required transition tasks, but the estimate doesn't include time for that preparatory work.

The estimate also assumes that you'll address all recommendations in this report. For many customers, the Readiness Check unearths features and customizations that you no longer use, so there's no need to move them to Lightning Experience. The migration is a great opportunity to toss old customization relics. With Lightning Experience, a fresh start awaits you.

Feature	Estimated hours spent on Salesforce development, configuration, and administration	Estimated hours spent on change management, user testing, and user training
Visualforce pages	For estimates, open the Lightning Experience Configuration Converter for Visualforce Pages.	
Custom buttons and links – JavaScript	7	2
AppExchange packages and third-party Computer-Telephony Integration (CTI)	5	2
Home pages	1	1
Sidebar components	1	1
Salesforce Console	6	2
Tweaks to other features (check your Effort Estimate spreadsheet for a list)	21	5
TOTAL IN HOURS	42	14

If you don't see these predictions in your report, sign up for a free small-group session with a Lightning expert to get more information. You get an invitation to register after you run the Readiness Check.

See Which Users Are Ready for Lightning Experience

Based on the features and customizations that the Readiness Check evaluates, your Readiness Report gives you an analysis of where each user profile stands. The analysis is based on the number of features for each profile that require attention, as well as the impact that particular feature gaps have on users with the profile.

The Readiness Report shows which profiles will be productive in Lightning Experience without any work. For profiles that aren't ready yet because they depend on functionality that needs attention, the report identifies the relevant features.

Evaluate Your Features and Customizations

Here's what the Readiness Check evaluates for you.

💡 **Tip:** We frequently add new features to the Readiness Check. Check the Release Notes for updates to this list.

- User profiles
- Tabs and objects:
  - Documents
  - Territory Management
  - Enterprise Territory Management

- Sales Cloud related lists:
  - Account Contact Roles
  - Account Partners
  - Campaign Influence
  - Opportunity Partners

- Home page and sidebar components
- Email templates
- Mail merge
- Lookup fields
- Activities
- Cases
- Report and dashboard folder sharing
- Report Builder
- Third-party computer-telephony integration (CTI)
- Salesforce Console (Sales and Service)
- Omni-Channel
- Chat
- Salesforce Knowledge
- SOS
- Entitlements
- Solutions
- S-controls
- Sharing buttons
- Data.com
- Web browsers

> **Note:** To evaluate actions and buttons, JavaScript buttons and link, Visualforce pages, AppExchange packages, or Hard-coded URLs, try the Lightning Experience Configuration Converter on page 53.

The Readiness Check requires metadata to evaluate features. Therefore, the report sometimes only evaluates a feature for a specific area. For example, it covers Sales Cloud related lists, but not all lists in general. It covers email templates but not mass email. There are some features that the tool doesn't evaluate at all, including customizable navigation, Ideas, macros, custom keyboard shortcuts, Recycle Bin, reports, and dashboards. We recommend that you manually evaluate the features and customizations that aren't covered by the Readiness Check.

SEE ALSO:

How Does the Lightning Experience Readiness Check Count User Impact?

Preview Your Org in Lightning Experience

How Does the Lightning Experience Readiness Check Count User Impact?

For some of your features, the Readiness Report provides details on how many users are working with the feature in Salesforce Classic, and how often. The Readiness Check bases user counts on different types of data or metadata, depending on what's available for each feature.

Here are some details about how the Readiness Check calculates user counts so you can better interpret the information in your report.

For this feature	We count this type of data
Tabs, Objects, QuickText, Service Contracts, and Solutions	How many users have permission to access the object
Related Lists, actions on case page layouts (Case.Email, Case.LogACall, ChangeStatus), Case features (Case Teams, Contact Roles), Sharing Buttons	How many users are assigned to layouts that access the feature
Lookup Filters	How many users have permission to access the field
Email Templates	How many times the feature was used (if available)
Custom Buttons and Links, Cases, and Salesforce Console	How many times the feature was used (if available) or how many users are assigned to layouts that access the feature
Third-Party Computer Telephony Integration (CTI)	How many times the feature was used (if available) or how many users are assigned to call centers in Setup
Omni-Channel	How many users are assigned to routing configurations
Chat	How many users are specified as Chat Users from Users in Setup
Salesforce Knowledge	How many users are assigned the user permission Manage Salesforce Knowledge
SOS	How many users are assigned to an SOS profile
Entitlements	How many times the feature was used (if available) or how many users have permission to access the object

Which License Types Are Included in User Impact Counts

Users on certain Salesforce licenses aren't included in the user impact counts in your Readiness Report.

License Types	Counted in User Impact
Salesforce	✔
Knowledge Only User	✔
Identity	
External Identity	
WDC Only User	
Salesforce Platform	✔
Lightning Platform - One App	✔
Lightning Platform App Subscription	✔
Company Community User	✔
Customer Community	

License Types	Counted in User Impact
Customer Community Plus	
Partner Community	
Chatter External	
Chatter Free	
Chatter Only (Chatter Plus)	✔
Sites and Site.com Guest User	
Site.com Only	
Authenticated Website User Licenses	
Customer Portal Manager Licenses	
Customer Portal Manager Licenses	
Customer Portal-Enterprise Administration Licenses	

Kick Off the Lightning Experience Readiness Check

To evaluate the readiness of your users and many of your org's features and customizations for Lightning Experience, run the Readiness Check. Access the tool from the Lightning Experience Transition Assistant.

EDITIONS

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

The Readiness Check and the Readiness Report are available in English only.

USER PERMISSIONS

To run the Lightning Experience Readiness Check
- Customize Application

  AND

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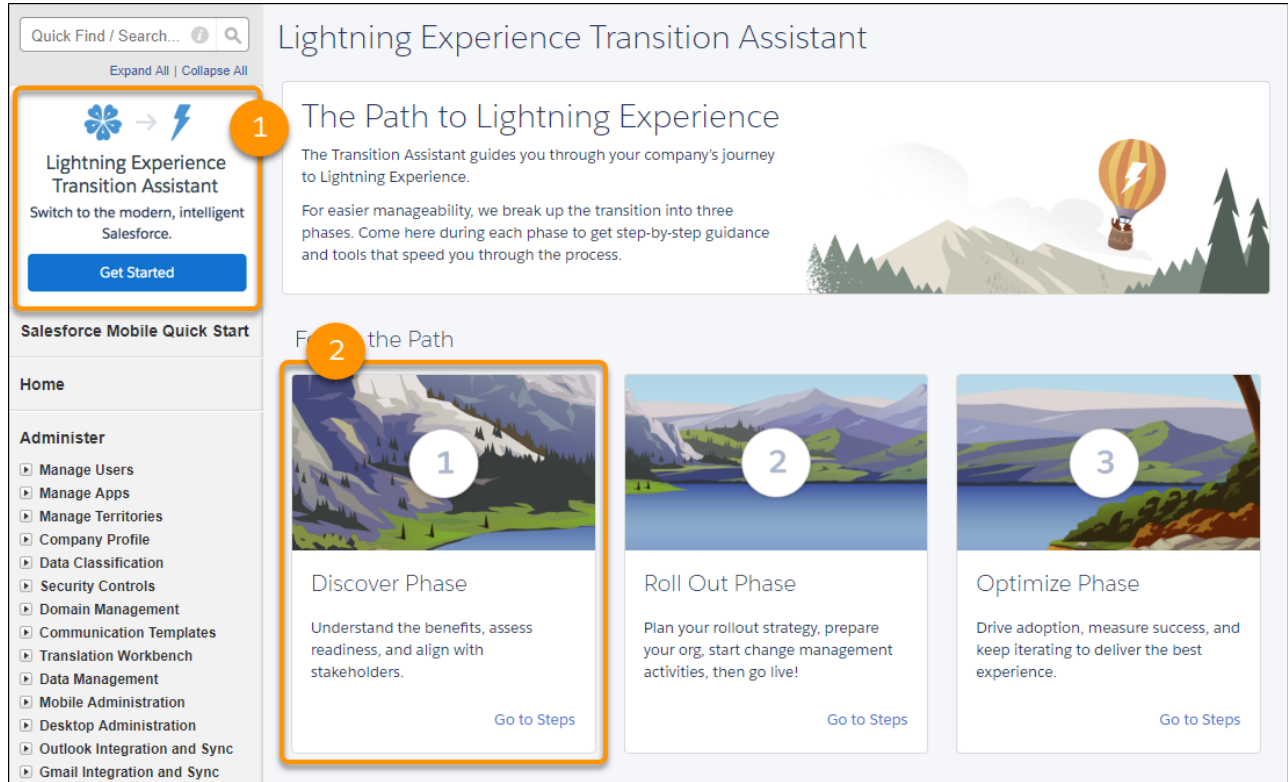
1. From Setup in Salesforce Classic, click **Get Started** in the Lightning Experience Transition Assistant tile at the top of the menu (1). From Setup in Lightning Experience, enter `Lightning` in the Quick Find box, then select **Lightning Experience Transition Assistant**.

2. Select the Discover phase (2).

3. Click **Evaluate Lightning Experience Benefits and Readiness** to expand the stage (3).

4. Click **Check Readiness** next to **Check your Lightning Experience readiness** (4).

When you run the Readiness Check, Salesforce generates a PDF Readiness Report and saves it in your Salesforce Files. You get an email when your report is ready.

SEE ALSO:

Who Can Run the Lightning Experience Readiness Check?

What Does the Lightning Experience Readiness Check Evaluate?

How Does the Lightning Experience Readiness Check Count User Impact?

What are the Gaps Between Lightning Experience and Salesforce Classic

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." If you're assigned to the standard System Administrator profile, you can switch to Lightning Experience at any time. But if you don't have access yet, the Preview feature in the Lightning Experience Transition Assistant lets you explore how your production org behaves in the new interface while you're working in Salesforce Classic. You can see exactly how your real data, business processes, and customizations work, and you can take Lightning Experience-only features for a test drive to see how they benefit your teams. You can also use Preview to test features and customizations that the Lightning Experience Readiness Check doesn't evaluate.

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 preview your org in Lightning Experience:

EDITIONS

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

USER PERMISSIONS

To use the Lightning Experience Transition Assistant:
- View Setup and Configuration

  AND

  Customize Application
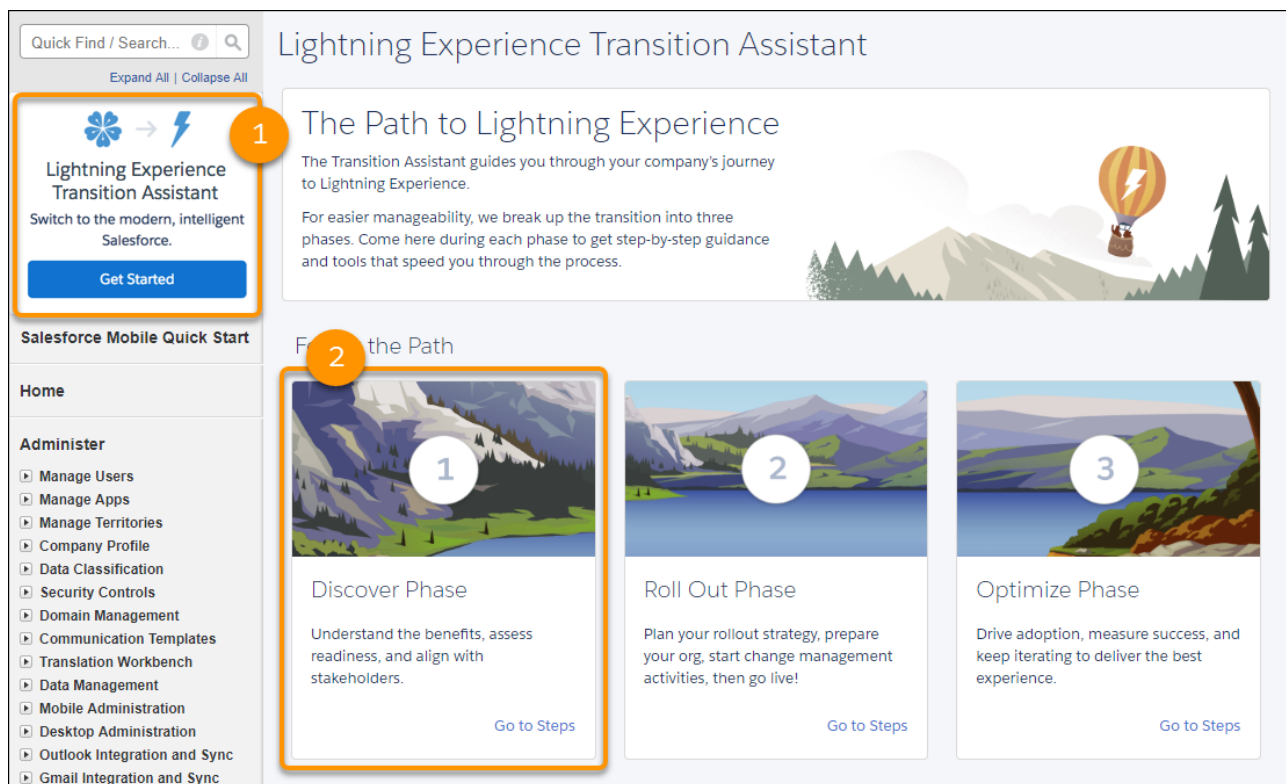
- From Setup in Salesforce Classic, click **Get Started** in the Lightning Experience Transition Assistant tile at the top of the menu (1).
- Select the Discover phase (2).
- Click **Evaluate Lightning Experience Benefits and Readiness** to expand the stage (3).
- Click **Preview** next to **Preview Lightning Experience** (4).

Salesforce Classic Doesn't Go Away When You Move Users to Lightning Experience

Set Up User Access to Lightning Experience

Check Your Org's Readiness for Lightning Experience

Supported Editions and User Licenses for Lightning Experience

Lightning Experience is available with these Salesforce editions and licenses.

Editions

Supported Editions	
	• Group Edition
	• Essentials Edition
	• Professional Edition

Editions

- 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 Lightning Platform (excluding Force.com - Free)
- Identity User
- Company (Employee) Community
- Chatter External
- Chatter Plus
- Chatter Free

Unsupported Licenses

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

🛑 **Important:** To learn about browser options and limitations for Lightning Experience, see Supported Browsers for Lightning Experience in Salesforce Help.

If your org still uses Internet Explorer 11, be aware that we're in the process of retiring support for this browser. There are significant performance issues when running Lightning Experience in IE11. Even if you opt into the extended support option for IE11, we recommend moving your users to an alternate modern browser like Google Chrome or Microsoft Edge as soon as possible.

Plan Your Lightning Experience Rollout

After completing an evaluation to understand your business goals and technical issues, pull your research together into a plan for rolling out Lightning Experience. As part of the plan, decide on the strategies for moving users to the new interface (all at once or in groups) and for preparing them for the coming change. We recommend rolling out in phases, starting with a pilot, so you don't have to do everything at once and can learn and refine as you go. The same goes for your rollout plan. Don't over-plan now and iterate on priorities after each group that you transition.

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

Pick a Rollout Strategy

In your Lightning Experience rollout plan, define the approach you'll use to move users to the new interface. Pick a strategy that works for your company's size, business goals, and the complexity of your Salesforce implementation. There are three common approaches: move everyone at the same time, move users gradually in groups, or start over with a new org. We recommend taking a phased approach, starting with a pilot group.

Pick the Users and Define the Scope of Work for Each Group in Your Rollout

If you're using a phased approach for your Lightning Experience rollout, develop a roadmap that shows how many groups you're planning on. And for each group, indicate the affected user profiles, the scope of work, and the estimated schedule. Prioritize new features and technical work by the needs of the users in each group. Don't worry about making the list perfect because you'll refine the priorities after you get real user feedback from your pilot group.

Develop a Change Management Strategy

Another critical component of your Lightning Experience rollout plan is how to manage the change for your Salesforce users when they move to the new interface. Failing to adequately prepare users ahead of time puts your transition project at risk. Get a sense of your company's readiness for change, then use your findings to define a change management strategy.

Other Considerations for Your Rollout Plan

There are other things to consider for your Lightning Experience rollout plan, such as metrics for measuring success.

Pick a Rollout Strategy

In your Lightning Experience rollout plan, define the approach you'll use to move users to the new interface. Pick a strategy that works for your company's size, business goals, and the complexity of your Salesforce implementation. There are three common approaches: move everyone at the same time, move users gradually in groups, or start over with a new org. We recommend taking a phased approach, starting with a pilot group.

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

Rolling out groups of users gradually has many benefits.

- Reduce scope by focusing on the business and technical requirements for the current group only.
- Move users to Lightning Experience sooner.
- Prepare and support fewer people at each stage for a more manageable change management process.
- Apply the lessons learned from earlier groups to deliver a better experience as you go.

Sometimes the other rollout strategies may make more sense. If you have a small number of Salesforce users and your org doesn't have much customization, a "big bang" approach can be effective. And starting over with a new org may be more efficient if your company is going through a significant change and you need to completely rethink your implementation.

Pick the Users and Define the Scope of Work for Each Group in Your Rollout

If you're using a phased approach for your Lightning Experience rollout, develop a roadmap that shows how many groups you're planning on. And for each group, indicate the affected user profiles, the scope of work, and the estimated schedule. Prioritize new features and technical work by the needs of the users in each group. Don't worry about making the list perfect because you'll refine the priorities after you get real user feedback from your pilot group.

Making the "who" decision is easy with your Readiness Report. Check the "Which Users Are Ready" section for the user profiles that are most ready for Lightning Experience. For the pilot group, pick a small team that will get immediate benefits. For subsequent phases, pick the next most ready profile, working your way up to the more complex cases.

The Readiness Report is also a great guide for defining the scope of work for each group. But first, look for items in the report that you can ignore altogether. If a feature isn't used by anyone, or if the impact to users is minor, cross it off your list! Then look for features that are actively used by the profiles in your upcoming group and prioritize items that require attention.

In addition to fixing priority issues, set up a least one key Lightning Experience feature, like Path, Duplicate Management, or Lead Conversion. Pick a feature that speeds up common tasks or redefines the way users in the group work.

> 💡 **Tip:** We make improvements to Lightning Experience and the Readiness Check regularly, so we recommend rerunning the Readiness Check occasionally. Issues that are noted in your Readiness Report may no longer be a problem by the time you start your implementation work.

SEE ALSO:

    Check Your Org's Readiness for Lightning Experience

    Enlist Champions to Validate Your Lightning Experience Rollout Priorities

Develop a Change Management Strategy

Another critical component of your Lightning Experience rollout plan is how to manage the change for your Salesforce users when they move to the new interface. Failing to adequately prepare users ahead of time puts your transition project at risk. Get a sense of your company's readiness for change, then use your findings to define a change management strategy.

Start with a change impact assessment to learn how users feel about your current Salesforce implementation and what their impressions are of Lightning Experience. It's also valuable to identify the processes and activities that change in the new interface, and work with affected stakeholders to assess the impact to teams and roles.

For more details on conducting these assessments, plus change impact templates where you can record and evaluate everything you learn, check out the Lightning Experience Transition Change Management Hub. You'll use the findings from this exercise to develop a strategy that helps you anticipate, and head off, user resistance and adoption blockers.

SEE ALSO:

    Manage Change With the Lightning Experience Transition Change Management Hub

Manage Change With the Lightning Experience Transition Change Management Hub

Addressing the human aspect of change is crucial to getting your users to adopt Lightning Experience. The Lightning Experience Transition Change Management Hub helps you develop a change management strategy for your rollout plan. And it guides you through the steps and best practices for managing change throughout your org's transition.

You can access the Change Management Hub from each phase in the Lightning Experience Transition Assistant. Or access it directly at https://lightning-readiness-check.salesforce.com/change.

EDITIONS

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

USER PERMISSIONS

To run the Lightning Experience Transition Change Management Hub:
- Customize Application, Modify All Data

To create groups:
- Create and Own New Chatter Groups

The hub recommends steps to take in each phase of your transition and includes tools and templates to help with the process.

- Download the Lightning Experience Enablement Pack for change management templates.
- Quickly create Chatter groups to communicate with stakeholders and users during your Lightning Experience rollout.

- Run a drip campaign that builds user excitement for Lightning Experience.
- Access Trailhead modules that users can complete for self-paced training.
- Solicit user feedback during the transition with tools like Chatter Polls.
- Monitor adoption progress with the Lightning Usage App.

Change Management Hub Considerations

- The Change Management Hub is a standalone application that lives outside your ordinary Salesforce environment. When you use it, your account will be used to pull relevant data from your Salesforce org into Heroku, where the data will be processed to provide the Change Management Hub's functionality. Heroku is another service offered by Salesforce on a separate infrastructure. The Change Management Hub may also use further downstream processors, including third parties. Tell me more about Heroku.
- Allow these IP addresses for your organization so admins can complete tasks in the hub that require access to Salesforce.
  - 52.2.2.209
  - 52.203.195.34
  - 52.200.207.131
  - 52.72.119.132

SEE ALSO:
> Video: Manage Change for a Successful Transition
>
> Lightning Experience Enablement Pack
>
> Set Trusted IP Ranges for Your Organization

Other Considerations for Your Rollout Plan

There are other things to consider for your Lightning Experience rollout plan, such as metrics for measuring success.

For more ideas, see Prepare for the Transition to Lightning Experience in the Lightning Experience Rollout Trailhead module. Check out the "Plan Your Lightning Experience Rollout" section.

EDITIONS

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

Align with Stakeholders on Your Lightning Experience Transition

Wrap up the Discover phase by aligning with executive leadership and affected stakeholders on the case for Lightning Experience. Make sure that there's consensus on the business goals, technical requirements, and your rollout and change management strategies. You need this group to green light your plans and allocate resources for the work. And having your leadership's support is key to building trust with users and helping them understand that moving to Lightning Experience is beneficial and worth their time.

EDITIONS

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

You've heard the adage "Show, Don't Tell"? Lead with this golden rule to get your stakeholders on board. Help them see the vision for the future of your sales and service teams. Showcase the benefits and savings you can realize by demo'ing Path, Kanban, Lightning dashboards, and other compelling Lightning Experience features. Show how the new interface and the Lightning Platform can help achieve operational goals. And make it personal by basing the demo on your teams' real life examples.

Roll Out Phase: Get Ready to Launch Lightning Experience

With your rollout plan in place and your stakeholders on board, you're ready to start preparing your org—and your users—for Lightning Experience. This is the time to kick off your change management strategy. And time to get busy on release development activities, including implementing Lightning Experience features and addressing the priority issues noted in your Readiness Report. The last piece is going live by giving users access to the new interface!

Because your rollout is an iterative process, you repeat some of these steps until you've moved all users to the new interface. Remember, you don't have to fix everything ahead of time.

Enlist Champions to Validate Your Lightning Experience Rollout Priorities

Thanks to your Lightning Experience Readiness Report and the rest of the data you gathered in your evaluation stage, you have a good sense of the scope of work for your pilot and subsequent rollout groups. But before you actually start the work, take a little time to validate your priorities by testing the default state of Lightning Experience. Ask a champion user in the upcoming rollout group to take the new interface for a test drive, and then get their feedback on what's working and what's not. This feedback may reveal that things you thought were problems aren't and that you haven't accounted for features or processes that the rollout group needs.

Prepare Your Users for Lightning Experience with Change Management

Kick off change management activities now and keep them up throughout the transition. Busy users aren't always receptive to change so your focus at this point is to win hearts and minds with communication, collaboration, training, and even a little bit of marketing. The Lightning Experience Transition Change Management Hub and Lightning Experience Enablement Pack give you guidance and tools to ensure that your users are well prepared for your launch.

Implement Lightning Experience Features

Take advantage of the hundreds of innovative features in Lightning Experience to transform how users work. There's a lot to choose from, so start with the features that best benefit the users in the current rollout group. Then keep iterating over time to add even more value.

Adjust Your Existing Customizations

Most of your Salesforce customizations just work in Lightning Experience. But there might be some aspects of your implementation that require a little attention for best results in the new interface. Use the Lightning Experience Readiness Report, the Lightning Experience Configuration Converter, and good old fashioned testing to figure out where things stand.

Launch Lightning Experience to Your Users

When it's launch time, set up access to Lightning Experience for the intended group of users. If you're doing a "big bang" rollout, set up everyone in your org. But if you're taking a phased approach, set up just the users for your pilot group (and so on).

Enlist Champions to Validate Your Lightning Experience Rollout Priorities

Thanks to your Lightning Experience Readiness Report and the rest of the data you gathered in your evaluation stage, you have a good sense of the scope of work for your pilot and subsequent rollout groups. But before you actually start the work, take a little time to validate your priorities by testing the default state of Lightning Experience. Ask a champion user in the upcoming rollout group to take the new interface for a test drive, and then get their feedback on what's working and what's not. This feedback may reveal that things you thought were problems aren't and that you haven't accounted for features or processes that the rollout group needs.

- Pick your Lightning Experience champion: Choose someone in the upcoming rollout group and enlist their help. Champions are your super-users—people who are enthusiastic about

Salesforce and regularly offer recommendations for making it better. If no one comes to mind, choose someone who is vocal about improving your business processes or is the first to adopt new technologies.

- Give your champion access to Lightning Experience: Create a permission set with the Lightning Experience User permission and assign it to your champion.
- Train your champion: Spend a little time showing your champion around Lightning Experience. Sit next to them as they get started and help with any questions. Resolve issues quickly to make good use of the champion's time.
- Let your champion fly: Have the champion do their job in Lightning Experience for a week. Show them the Switcher so they can get back to Salesforce Classic if they're stuck on something. Ask your champion to record experiences and recommendations on how to better meet business needs.
- Get feedback: Talk to your champion about what's working well and which features aren't ready for prime time.
- Revise your rollout plan: Decide which of the issues identified by your champion are critical and which are nice to have. Adjust the priorities for your upcoming rollout group to address business-stopping issues. You can leave secondary items for future iterations. And remember that users can always switch back to Salesforce Classic so you don't need to delay your rollout if some features aren't perfect yet.

Repeat these steps at the start of each group in your rollout plan.

SEE ALSO:

> Kick Off the Lightning Experience Readiness Check
>
> Verify that Lightning Experience is Turned On

Prepare Your Users for Lightning Experience with Change Management

Kick off change management activities now and keep them up throughout the transition. Busy users aren't always receptive to change so your focus at this point is to win hearts and minds with communication, collaboration, training, and even a little bit of marketing. The Lightning Experience Transition Change Management Hub and Lightning Experience Enablement Pack give you guidance and tools to ensure that your users are well prepared for your launch.

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

Recommended change management activities during the Roll Out phase include:

- Create a forum where you can communicate and collaborate with users and stakeholders. We recommend setting up a rollout Chatter group using the Change Management Hub. The Hub streamlines the process, even providing a welcome message template to kick things off on the right note.
- Build anticipation and excitement before your launch date. Run a drip campaign that promotes Lightning Experience and shows users what's in it for them. The Hub includes several campaign templates that highlight key Lightning Experience features. You can tailor the messages to reflect your business then use the Hub to share them on Chatter or in other communication channels like email.
- Train users to work in Lightning Experience so they're comfortable and productive from day one of your launch. The Hub provides access to several Trailhead modules that are designed for self-paced training. Or set up some in-person training sessions, with help from your Lightning Experience champions. They understand the value of the new interface and the needs of the team, so are a perfect authority to get others on board. Have a champion demo Lightning Experience and show everyone how to complete common tasks. Use the customizable training deck in the Enablement Pack as a starting point.

SEE ALSO:

> Manage Change With the Lightning Experience Transition Change Management Hub
>
> Lightning Experience Enablement Pack

Implement Lightning Experience Features

Take advantage of the hundreds of innovative features in Lightning Experience to transform how users work. There's a lot to choose from, so start with the features that best benefit the users in the current rollout group. Then keep iterating over time to add even more value.

Here are some great candidates to consider.

Feature	Description
Activity Timeline	Give users an easier, more efficient way to keep track of current and past activities. All the key details for each task, meeting, logged call, and sent email are bundled together, right on the page with other record details.
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.
Enhanced Notes	Help your users stay organized with our enhanced note-taking tool. It's a breeze to create rich-text notes and quickly relate them to specific records. When you turn on Enhanced Notes, remember to add the new Notes related list to page layouts. Adding the Notes related list lets your users create and read notes directly from their records.
Salesforce Files	Use 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. Adding the Files related list lets users upload files to records, see files associated with records, and quickly page through files in the visually rich preview player.
Path	To work more efficiently or close more deals, help your users adopt your company's processes. Set up a process based on an object's status or stage. Add guidance for success at each step in the process.
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, consider whether you want this option.

Feature	Description
Home Page	Give your users everything they need to manage their day from the Lightning Experience Home page. Sales reps can see their quarterly performance summary and get important updates on critical tasks and opportunities. You can also customize the page for different types of users and assign custom pages for different profiles.
Duplicate Management	To alert users when they're about to create a duplicate record, create duplicate rules. Duplicate rules establish 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.
Lightning Apps	Help users work more efficiently by giving them access to all the data and tools they need. What's most important to sales reps? Accounts, events, and organizations. How about sales managers? Reports and dashboards make the top of the list. Lightning apps take things to another level past Classic apps by letting you brand your apps with a custom color, logo, and utility bar.
Lightning Console Apps	Have users in fast-paced environments like call centers or contact centers? Console apps are perfect for these situations. Users can view multiple records and their related records on the same screen, and quickly work through records from a list using split view. It's easy to jump back-and-forth between lists and records without losing track of what you're working on.

SEE ALSO:

Lightning Experience Roadmap

Lightning Experience Exclusive Features

Adjust Your Existing Customizations

Most of your Salesforce customizations just work in Lightning Experience. But there might be some aspects of your implementation that require a little attention for best results in the new interface. Use the Lightning Experience Readiness Report, the Lightning Experience Configuration Converter, and good old fashioned testing to figure out where things stand.

Leverage the usage data in the Readiness Report and the Configuration Converter to decide if an issue is worth your effort. For example, if you have custom JavaScript buttons but no one is using them, why bother converting them for Lightning Experience?

If there's work to do, check out the transition tools at your disposal. These tools lighten your workload by streamlining steps or automating adjustments.

EDITIONS

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

Get Started with the Lightning Experience Configuration Converter

The Lightning Experience Configuration Converter is a standalone tool that lives outside of Salesforce. It helps you prepare your org for Lightning Experience by streamlining or automating common transition tasks.

Move Actions and Buttons to Lightning Experience

The Lightning Experience Configuration Converter scans your org for actions and buttons. You can move all the actions and buttons at once, or let Salesforce guide you through the move process for each object.

Convert JavaScript Buttons and Links into Lightning Experience Alternatives

Uncomfortable with code? Stymied by JavaScript? Don't worry. With just a few clicks in the Lightning Experience Configuration Converter, you can recreate many JavaScript buttons and links as Lightning components, quick actions, or other declarative solutions.

Update References to Hard-Coded URLs for Lightning Experience

Some hard-coded references to your org's original URL won't work after you enable My Domain. Use the Hard-Coded URLs' tab in the Lightning Experience Configuration Converter to locate your hard-coded URLs, and then update them with a single click.

Prepare Your Visualforce Pages for Lightning Experience

Scan your Visualforce pages to identify issues that may affect your transition to Lightning Experience. Visualforce pages are grouped by profile and prioritized by greatest user impact. Apply the Lightning look and feel to one or more Visualforce pages automatically with Lightning Experience Stylesheets, no code required. Always test your Visualforce page in Lightning Experience first—most work as-is. If the listed issue prevents the page from working properly, follow the instructions to tweak the markup. If a Visualforce page requires significant refactoring, move it to Lightning Components.

Review AppExchange Packages for Lightning Experience Compatibility

Scan your installed package metadata and prepare your AppExchange packages for Lightning Experience. Find out which packages are ready to go. Get recommendations on updating, replacing, or verifying the rest.

Convert Attachments and Classic Notes

Does your org use attachments and notes? In Lightning Experience, users get a better experience if you convert existing attachments to Salesforce Files and classic notes to enhanced notes. You can automate this conversion work with the handy Magic Mover for Notes and Attachments tool.

Migrate Your Classic Knowledge Base to Lightning Knowledge

If your company uses Classic Knowledge, Lightning Experience users must switch to Salesforce Classic to do things like find or create Knowledge articles. Moving your Classic knowledge base into Lightning Knowledge gives your users a seamless experience and much better workflow. When you're ready, the Lightning Knowledge Migration Tool does most of the heavy lifting for you.

Pro Tips for Your Lightning Experience Implementation

Give users a smooth transition to Lightning Experience by making sure the important and necessary parts of your classic implementation are available in the new interface. Here are some tips for integrating your org's data and business-critical customizations with Lightning Experience features. We'll look at ways to avoid common gotchas and work around some of the issues that may have you stumped.

Get Started with the Lightning Experience Configuration Converter

The Lightning Experience Configuration Converter is a standalone tool that lives outside of Salesforce. It helps you prepare your org for Lightning Experience by streamlining or automating common transition tasks.

> **Note:** Get the full picture of your org by running the Lightning Experience Readiness Check as well as using the Lightning Experience Configuration Converter.

EDITIONS

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

Available in: English language only

> **Note:** The Lightning Experience Configuration Converter is a standalone application that lives outside your ordinary Salesforce environment. When you use it, your account will be used to pull relevant data from your Salesforce org into Heroku, where the data will be processed to provide the Configuration Converter's functionality. Heroku is another service offered by Salesforce on a separate infrastructure. The Configuration Converter may also use further downstream processors, including third parties. Tell me more about Heroku.

Scan Your Org for Updates with the Lightning Experience Configuration Converter

The Lightning Experience Configuration Converter searches your org for customizations that may need adjusting and speeds up getting them ready for the new interface. Use it to evaluate and update items such as Visualforce pages, JavaScript buttons and links, hard-coded URLs, actions and buttons, and AppExchange packages.

Review and Act on Lightning Experience Configuration Converter Scan Results

Use Lightning Experience Configuration Converter scan results to target conversions that make the most impact on the users you're transitioning next. In many cases, the Configuration Converter can convert features at the click of a button.

Lightning Experience Configuration Converter Considerations

Keep these considerations in mind when working with the Configuration Converter.

SEE ALSO:

Check Your Org's Readiness for Lightning Experience

Scan Your Org for Updates with the Lightning Experience Configuration Converter

The Lightning Experience Configuration Converter searches your org for customizations that may need adjusting and speeds up getting them ready for the new interface. Use it to evaluate and update items such as Visualforce pages, JavaScript buttons and links, hard-coded URLs, actions and buttons, and AppExchange packages.

> **Note:** Get the full picture of your org by running the Lightning Experience Readiness Check as well as using the Lightning Experience Configuration Converter.

> **Note:** The Lightning Experience Configuration Converter is a standalone application that lives outside your ordinary Salesforce environment. When you use it, your account will be used to pull relevant data from your Salesforce org into Heroku, where the data will be processed to provide the Configuration Converter's functionality. Heroku is another service offered by Salesforce on a separate infrastructure. The Configuration Converter may also use further downstream processors, including third parties. Tell me more about Heroku.

To check your progress, Salesforce recommends scanning each feature area at least one time each release.

1. Open a tab in your browser, and log in to the Lightning Experience Configuration Converter at https://lightning-configuration.salesforce.com/.

   We recommend running the tool in a sandbox or Developer Edition org, and then migrating changes to your production org.

2. Review the status of each feature on the Home tab.

3. To update the status of a feature, kick off a scan of that feature from the Home tab.

   > **Note:** While the Configuration Converter is running a scan, you can't view scan results on any tab, take conversion actions, or kick off another scan. You can close the Configuration Converter while a scan is in progress. Salesforce sends you an email when the scan is finished.

EDITIONS

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

USER PERMISSIONS

To run the Lightning Experience Configuration Converter:
- Customize Application, Modify All Data

4. If this is your first time using the tool, scan each feature.

5. Review and act on scan results.

Review and Act on Lightning Experience Configuration Converter Scan Results

Use Lightning Experience Configuration Converter scan results to target conversions that make the most impact on the users you're transitioning next. In many cases, the Configuration Converter can convert features at the click of a button.

Select the tab for a feature to see detailed scan results. Scan results include guidance and recommendations on updating potential issues. In many cases, the Lightning Experience Configuration Converter lets you automate the recommended updates. For others, it walks you through manual updates.

- Actions and Buttons
- JavaScript Buttons and Links
- Hard-Coded URLs
- Visualforce Pages
- AppExchange Packages

Before taking recommended actions, use the current data to verify that your rollout plan is focused on the correct priorities for the group of users you're transitioning next. We recommend using the **User Impact** column to help focus on just the items needed for relevant users. Review Discover Phase: Start Your Lightning Experience Transition for help with planning your rollout and change management strategies.

> **EDITIONS**
>
> Available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
>
> Available in: English language only

Lightning Experience Configuration Converter Considerations

Keep these considerations in mind when working with the Configuration Converter.

General Considerations

- The Configuration Converter is a standalone tool that lives outside of Salesforce. Allow these IP addresses for your organization so admins can access the tool.
    - 52.2.2.209
    - 52.203.195.34
    - 52.200.207.131
    - 52.72.119.132
- The tool scans these objects. The JavaScript Buttons tab includes buttons from additional objects not listed here, but you can't convert them using the tool.
    - Account

- – Asset
- – Campaign
- – Case
- – Contact
- – Contract (JavaScript Buttons tab only)
- – Event
- – Lead
- – Opportunity
- – Order
- – Person Account
- – Task (JavaScript Buttons tab only)
- – Custom objects

- If a page layout name contains special characters, some actions to that layout don't work using the tool.

Internet Browsers

The converter isn't supported in Internet Explorer 11.

Considerations for JavaScript Buttons and Links

- The converter's JavaScript Buttons area suggests Lightning components for some conversions.
- Not all JavaScript buttons and links can be recreated. For example, the tool can't recreate some items that contain a URL that sets predefined values (also known as a URL hack).
- Some complex JavaScript alerts, such as those with multiple operations, must be converted manually. The converter recommends actions that you can take to perform the manual conversion.
- When you deploy a converted quick action to a page layout whose Salesforce Mobile and Lightning Experience Actions section isn't customized, the tool overrides the defaults in that section and then deploys the action.
- If a JavaScript custom button or link isn't used on any page layouts, you can convert it but not deploy it. The converted item is added to the palette of the object's page layouts, and you can then add it to a page layout manually.
- List view buttons and items from managed packages aren't supported for conversion. To get a list of your managed packages, run the Lightning Experience Readiness Report and look under AppExchange Packages.
- If your JavaScript button or link code uses REQUIRESCRIPT, the only scripts that are supported for conversion are:
  - – `/soap/ajax/xx.x/connection.js`
  - – `/soap/ajax/xx.x/apex.js`

Considerations for Actions and Buttons

- For the Case object, Change Status and Log a Call actions aren't moved because the Salesforce Mobile and Lightning Experience Actions section doesn't support them. Make the necessary updates manually.
- If you don't see a step in the wizard, such as selecting a record type or removing the Mobile Smart Actions bundle, it's not applicable to the selected page layouts.
- If a page layout's Quick Actions in the Salesforce Classic Publisher section hasn't been customized, you can't select the page layout.
- Actions and buttons from objects in managed packages aren't supported for moving.

Considerations for Hard-Coded URLs

- The Configuration Converter scans the following for hard-coded URLs.
    - Custom buttons or links
    - Visualforce pages
    - Visualforce components
    - Apex triggers
    - Apex classes
    - Collaboration groups
    - Email templates
    - Knowledge articles
    - Home Page content
    - Web tabs
    - Document URLs

- Hard-coded URLs in Chatter posts and Knowledge articles appear in the scan results, but they can't be updated by the Configuration Converter.
- Hard-coded URLs in email templates and document URLs can't be updated if they're stored in the user's personal folder or in the general public folder.
- URLs in packages and workflows aren't scanned and can't be updated by the Configuration Converter.
- The Configuration Converter displays each hard-coded URL as a separate line item. Previously, the Readiness Check grouped duplicate URLs into a single row.

SEE ALSO:

Set Trusted IP Ranges for Your Organization

Restrict Login IP Ranges in Profiles

Move Actions and Buttons to Lightning Experience

The Lightning Experience Configuration Converter scans your org for actions and buttons. You can move all the actions and buttons at once, or let Salesforce guide you through the move process for each object.

Opt to move your actions and buttons all at once, or one at a time.

1. Log in to the Lightning Experience Configuration Converter, then select the **Actions and Buttons** tab.
2. If your org hasn't been scanned for actions and buttons before, or if the scan data is out of date, scan for actions and buttons to get the latest data.
3. Select all actions and buttons by clicking the select box in the header. Or, pick which actions and buttons to move by selecting individual rows. You can always move the rest later.
4. Click **Move Selected**.

EDITIONS

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

Available in: English language only

USER PERMISSIONS

To run the Lightning Experience Configuration Converter:

- Customize Application, Modify All Data

5. A confirmation window appears that summarizes the steps we'll take once you confirm. While the move takes place, you can't work in the other tabs. Salesforce emails you when the move is complete.

SEE ALSO:

Lightning Experience Configuration Converter Considerations

Scan Your Org for Updates with the Lightning Experience Configuration Converter

Convert JavaScript Buttons and Links into Lightning Experience Alternatives

Uncomfortable with code? Stymied by JavaScript? Don't worry. With just a few clicks in the Lightning Experience Configuration Converter, you can recreate many JavaScript buttons and links as Lightning components, quick actions, or other declarative solutions.

The Lightning Experience Configuration Converter creates new Lightning components, quick actions, and other declarative solutions without touching the original items. Before committing to any changes, you can preview the new component code or the declarative steps to verify that the alternatives work.

> **Note:** Starting in October 2019, JavaScript Buttons and Links scan results are only available in the Lightning Experience Configuration Converter. Admins don't receive scan results as email attachments.

1. Log in to the Lightning Experience Configuration Converter, then select the **JavaScript Buttons** tab.

2. If no data exists or if the existing scan data is outdated, click Scan for JavaScript Buttons to see the latest information. The last scanned date is displayed in the table header.

3. When the scan finishes, all the JavaScript buttons and links found are listed for each object. You can see which page layout each item is on and the recommended conversion type.

4. To see conversion options for an item, click ⏷ on its row.

For all items, except the ones marked as `Manual (More Details)` or `not supported`, you can:

Option	Description
Preview	View what the suggested alternative is, whether it's declarative or programmatic.
Convert	Convert the item into the suggested alternative, but not add it to the page layout.
Convert & Deploy	Convert the item into the suggested alternative, and add it to the page layout.
	Quick actions, Lightning components, and custom buttons are added as actions to the Salesforce Mobile and Lightning Experience Actions section of the page layout.
	Converted links are added to the Custom Links area of the page layout's detail section.

5. If you want to convert the item but not deploy it to your users yet, click ⏷ , and select **Convert**.

The prefix LCC is added to the converted item's API Name.

Because the item was converted but not deployed, it wasn't added to the page layout.

When you're ready for your users to use the converted item, you can deploy it in two ways.

- Go to the affected page layout in Setup. In the palette, locate the new item under Mobile & Lightning Actions and manually add it.

- In the Lightning Experience Configuration Converter, on the Converted Buttons tab, find the converted item, click ⏷ , and select **Deploy**.

6. To convert an item and add it to the page layout, click ⏷ , and select **Convert & Deploy**.

> ⛔ **Important:** For partial conversions, the component code is incomplete. We recommend that you convert it but not use the tool to deploy it. If you deploy the incomplete code, the item doesn't work properly.

7. After you deploy the converted button or link, we recommend that you remove the original one from the page layout. You can mouse over the items in the palette to see which one is the new converted item. When you're satisfied with the replacement, consider deleting the original JavaScript item from your org.

JavaScript Button and Link Conversion and Deployment Behavior

The Lightning Experience Configuration Converter recognizes several types of JavaScript buttons and links, including alerts, redirects, urlHacks, popups, and confirmation dialogs. Depending on what the button or link does, the tool suggests a declarative or programmatic alternative that's compatible with Lightning Experience.

When the Lightning Experience Configuration Converter Can't Convert Your JavaScript Buttons or Links

Sometimes the Lightning Experience Configuration Converter finds a JavaScript button or link that's either not a supported type—like a related list or list view button— or is too complex to convert. When that happens, you see Manual (More Details) in the Conversion Type column. Here's what to do next.

SEE ALSO:

JavaScript Button and Link Conversion and Deployment Behavior

Convert Your JavaScript Buttons for Lightning Experience

Lightning Experience Configuration Converter Considerations

JavaScript Button and Link Conversion and Deployment Behavior

The Lightning Experience Configuration Converter recognizes several types of JavaScript buttons and links, including alerts, redirects, urlHacks, popups, and confirmation dialogs. Depending on what the button or link does, the tool suggests a declarative or programmatic alternative that's compatible with Lightning Experience.

In all conversions, your original JavaScript button or link remains untouched.

EDITIONS

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

Conversion Type	Description	Conversion and Deployment Behavior
Custom Button or Link	You can convert the JavaScript button or link to a regular custom button or link.	Upon conversion, a button or link matching the functionality and label of the JavaScript button or link is added to your org on the same object as the original. For example, suppose that this org has a JavaScript detail page link called "Visit Website." After conversion, a custom URL link with the same name appears in the Buttons, Links, and Actions list for the object. The prefix "LCC" is added to the converted button or link's API Name.

Conversion Type	Description	Conversion and Deployment Behavior
		When deployed, custom buttons are added as actions to the Salesforce Mobile and Lightning Experience Actions section of the affected page layout. Deployed links are added to the Custom Links area of the page layout's detail section.
Quick Action	You can convert the JavaScript button to a quick action.	Upon conversion, a quick action matching the functionality and label of the JavaScript button is added to your org on the same object as the original. For example, suppose that this org has a JavaScript button called "Create Opportunity." After conversion, a quick action with the same name appears in the Buttons, Links, and Actions list for the object. The prefix "LCC" is added to the converted button or link's API Name.
		When deployed, the quick action is added to the Salesforce Mobile and Lightning Experience Actions section of the affected page layout.
Lightning Component (Full)	You can convert the JavaScript button or alert to a Lightning component quick action and retain its full functionality.	Upon conversion, a Lightning component bundle with component code and a controller file is added to your org. You can find it in Setup under Custom Code | Lightning Components.
		In addition, a Lightning component action that triggers the new component is created. The Lightning component action has the same name as the original JavaScript button or link.
		When deployed, the Lightning component action is added to the Salesforce Mobile and Lightning Experience Actions section of the affected page layout.
Lightning Component (Partial)	You can partially convert the JavaScript button or alert to a Lightning component.	Upon conversion, a Lightning component bundle with component code and a controller file is added to your org.
		A Lightning component action that triggers the new component is also created. The Lightning component action has the same name as the original JavaScript button or link.
		Complete the component before deploying it. If you don't have access to a developer to help you with the code, post your issue on the Lightning Experience Configuration Converter Trailblazer Community. Folks there would be glad to help.
		After the code has been finished to match the functionality of the JavaScript button or link, manually add its Lightning component quick action to the page layout.
Manual (More Details)	The Lightning Experience Configuration Converter can't convert the item.	Click **Manual (More Details)** to get more information and suggested replacements. Sometimes, the reason is because the type isn't supported for conversion, such as a list view or related list button. In other cases, the JavaScript button or alert is too complex to convert declaratively.

You can view the converted items in the Buttons, Links, and Actions list in the Object Manager in Setup.

SEE ALSO:

Lightning Component Actions

Scan Your Org for Updates with the Lightning Experience Configuration Converter

When the Lightning Experience Configuration Converter Can't Convert Your JavaScript Buttons or Links

Sometimes the Lightning Experience Configuration Converter finds a JavaScript button or link that's either not a supported type—like a related list or list view button— or is too complex to convert. When that happens, you see Manual (More Details) in the Conversion Type column. Here's what to do next.

When you click **Manual (More Details)** and the button isn't supported, you get a message that you can't covert the item.

If your button or link matches one of the common archetypes, such as a dialog or urlHack, the message recommends one or more components in the Sample Components for Lightning Component Actions repo on GitHub. This repo contains sample Lightning component bundles that represent some of the most common JavaScript button use cases. They've been created with extra annotation to help you configure them to your own needs.

You don't need a GitHub login to access the repo, and you can install the components in your org using an unmanaged package.

> 💡 Tip: Admins, you can do it! Installing the Lightning components from GitHub takes only a few clicks.

1. Determine what your comfort level with code is.

   - If the thought of working with code makes you break out in a cold sweat, and you don't have anyone to help you, fear not! We're not going to abandon you. First, note which components the converter recommended. Install the components in your org. Then post your issue on the Lightning Experience Configuration Converter Trailblazer Community. The folks there would be glad to help you.

   - If you're not comfortable with code, but you have a developer that can help you, install the component bundle unmanaged package from GitHub. You can then work through it together.

   - If you're comfortable with code, go to the GitHub repo, and look at the available components. Scroll through the Classes & Components list, and see which of the recommended components is similar to what your JavaScript button does. Install the component bundle unmanaged package in your org.

     Ready to install the components? Let's go.

2. Make sure that you're logged in to the Salesforce sandbox or Developer Edition org that you want to use to work on the button conversion.

   We recommend not installing these components in your production org.

3. Go to the home page for the component bundle on GitHub.

   - In the Lightning Experience Configuration Converter, clicking a link in the Manual (More Details) dialog brings you directly into a component file in GitHub. Navigate to the top level by clicking **LEXComponentsBundle** in the directory structure breadcrumb.
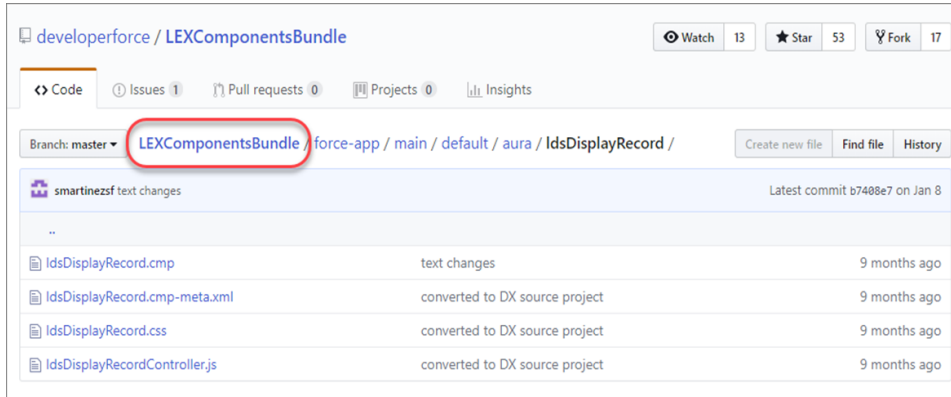
- Otherwise, open a new browser tab, and go to https://github.com/developerforce/LEXComponentsBundle.

4. Scroll down the page until you find the **Click here to install** link, and click it.
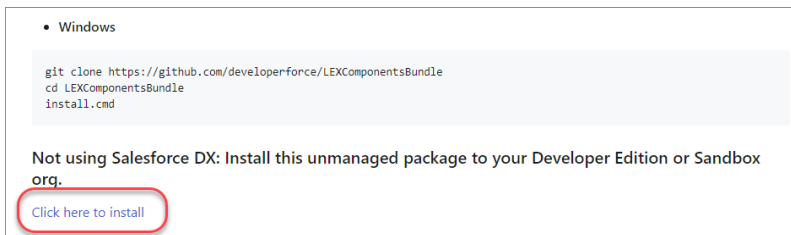
5. If you're asked, log in with your org credentials.

6. Leave the settings as they are, and click **Install**.

   The installation can take a few moments.

7. When the installation finishes, click **Done**.

8. To find the installed components, from Setup, in the Quick Find box, enter `Components`, and then click **Lightning Components**.

   Not going to customize the code yourself? Get help to make it happen, and skip to the last step. Otherwise, read on.

9. Click the name of the component that you want to configure, and then click **Developer Console**.

10. Update the component code to match the functionality of the JavaScript button or link that it's replacing.

11. When the updated Lightning component is ready to use, create a Lightning component quick action to trigger it.

12. Go to the affected page layout in Setup. Find the Lightning component quick action that you created in the palette, and add it to the Salesforce Mobile and Lightning Experience Actions section of the page layout.

    You can find Lightning component actions in the palette under Mobile & Lightning Actions.

SEE ALSO:

Lightning Component Actions

Scan Your Org for Updates with the Lightning Experience Configuration Converter

JavaScript Button and Link Conversion and Deployment Behavior

Update References to Hard-Coded URLs for Lightning Experience

Some hard-coded references to your org's original URL won't work after you enable My Domain. Use the Hard-Coded URLs' tab in the Lightning Experience Configuration Converter to locate your hard-coded URLs, and then update them with a single click.

Opt to move your hard-coded URLs all at once, or one at a time.

1. Log in to the Lightning Experience Configuration Converter, then select the **Hard-Coded URLs** tab.

2. If your org hasn't been scanned for hard-coded URLs before, or if the scan data is out of date, scan to get the latest data.

3. Select all hard-coded URLs by clicking the select box in the header. Or, pick which URLs to move by selecting individual rows. You can always move the rest later.

4. Click **Update Selected URLs**.

5. A confirmation window appears that summarizes the steps we take after you confirm. While the update takes place, you can't work in the other tabs. Salesforce emails you when updates are completed.

SEE ALSO:

Scan Your Org for Updates with the Lightning Experience Configuration Converter

Lightning Experience Configuration Converter Considerations

Check Your Org's Readiness for Lightning Experience

EDITIONS

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

Available in: English language only

USER PERMISSIONS

To run the Lightning Experience Configuration Converter:

- Customize Application, Modify All Data

Prepare Your Visualforce Pages for Lightning Experience

Scan your Visualforce pages to identify issues that may affect your transition to Lightning Experience. Visualforce pages are grouped by profile and prioritized by greatest user impact. Apply the Lightning look and feel to one or more Visualforce pages automatically with Lightning Experience Stylesheets, no code required. Always test your Visualforce page in Lightning Experience first—most work as-is. If the listed issue prevents the page from working properly, follow the instructions to tweak the markup. If a Visualforce page requires significant refactoring, move it to Lightning Components.

Note: Starting in October 2019, Visualforce feature scan results are only available in the Lightning Experience Configuration Converter. Admins do not receive scan results as email attachments.

EDITIONS

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

Apply Lightning Stylesheets to Visualforce Pages Automatically

The Lightning Experience Configuration Converter can apply Lightning Experience Stylesheets to one or more Visualforce pages automatically, no code required.

Update Visualforce Markup for Lightning Experience

Some Visualforce pages may need tweaking to work in Lightning Experience. Don't worry if you don't have Visualforce experience—the workarounds show you exactly what to do each step of the way. Always test your Visualforce page in Lightning Experience first—most work as-is. If the listed issue is preventing the page from working properly, follow the instructions to tweak the markup and make it work. If a Visualforce page requires significant refactoring, move it to a Lightning component.

SEE ALSO:

Lightning Experience Configuration Converter Considerations

Scan Your Org for Updates with the Lightning Experience Configuration Converter

Check Your Org's Readiness for Lightning Experience

Apply Lightning Stylesheets to Visualforce Pages Automatically

The Lightning Experience Configuration Converter can apply Lightning Experience Stylesheets to one or more Visualforce pages automatically, no code required.

1. Log in to the Lightning Experience Configuration Converter, then select the **Visualforce Pages** tab.

2. If your org hasn't been scanned for Visualforce pages before, or if the scan data is out of date, scan to get the latest data.

3. Select all Visualforce pages by clicking the select box in the header. Or, pick which Visualforce pages to apply stylesheets to by selecting individual rows.

4. Click **Apply Lightning Experience Stylesheets**.

5. To change a Visualforce page back to its original style sheet, select **Revert to Original Stylesheet** from the dropdown menu. You can only revert one Visualforce page to its original style sheet at a time.
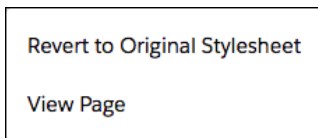
> Revert to Original Stylesheet
>
> View Page

Update Visualforce Markup for Lightning Experience

Some Visualforce pages may need tweaking to work in Lightning Experience. Don't worry if you don't have Visualforce experience—the workarounds show you exactly what to do each step of the way. Always test your Visualforce page in Lightning Experience first—most work as-is. If the listed issue is preventing the page from working properly, follow the instructions to tweak the markup and make it work. If a Visualforce page requires significant refactoring, move it to a Lightning component.

These workarounds are meant to guide you in the right direction. If you're unable to find a working solution, post questions to the Lightning Exp Configuration Converter group in the Trailblazer Community. Use the #VisualforceInLightning hashtag to call on our experts.

Reconfigure iframe Components

When a URL is displayed in an inline frame (iframe) on a Visualforce page, it can cause errors in Lightning Experience. Sometimes your URL looks different than you want, or maybe the whole page doesn't load in Lightning Experience. Most iframes are compatible with Visualforce in Lightning Experience. However, if you preview your Visualforce page in Lightning Experience and don't like what you see, you can usually fix it.

Replace the window.location Method

The window.location variable is a JavaScript method used to redirect the browser to a new page. JavaScript code in a Visualforce page that sets window.location directly isn't compatible with Lightning Experience. That's the bad news. The good news is that sforce.one navigation methods do the same thing, and are compatible with Lightning Experience.

Replace Static URLs

Lightning Experience doesn't support the use of static URLs to link to Salesforce resources. Fortunately, there's a much better alternative that future proofs your URLs. URLFOR is a function that calculates a URL based on inputs, rather than relying on something static that can't change. Use the URLFOR function with the appropriate action instead of direct URLs.

Apply Lightning Stylesheets to Visualforce Pages Manually

With Lightning stylesheets, it's easy to tweak your existing Visualforce pages so they'll display with classic styling in Salesforce Classic and Lightning styling in Lightning Experience.

SEE ALSO:

Check Your Org's Readiness for Lightning Experience

Reconfigure iframe Components

When a URL is displayed in an inline frame (iframe) on a Visualforce page, it can cause errors in Lightning Experience. Sometimes your URL looks different than you want, or maybe the whole page doesn't load in Lightning Experience. Most iframes are compatible with Visualforce in Lightning Experience. However, if you preview your Visualforce page in Lightning Experience and don't like what you see, you can usually fix it.

EDITIONS

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

1. Locate the iframe in the Visualforce code.

   a. From Setup, enter `Visualforce` in the **Quick Find** box, then select **Visualforce Pages**.

   b. Click **Edit** next to the Visualforce page.

   c. Search the Visualforce markup for each of the following: `apex:iframe`, `iframe`, and `apex:canvasApp`.

   📝 Note: Address each instance that you find separately.

USER PERMISSIONS

To create, edit, or delete Visualforce pages:
- Customize Application

To create and save Lightning pages in the Lightning App Builder:
- Customize Application

To create and edit custom tabs:
- Customize Application

2. If you find any instances of `apex:canvasApp`, explore these other options to make it available in the UI.

3. If you find any instances of `apex:iframe` or `iframe`, find the source of the iframe.

   a. The source can be found after the `src=`. If you see `$Page`, the iframe is referencing another Visualforce page. Otherwise, the source is a URL.

```
<apex:iframe src="{!$Page.AccountListView}"/>

<iframe src="https://salesforce.com"/>
```

4. If the source of the iframe is a URL, use a custom web tab instead of the iframe.

   a. Identify the URL. View the Visualforce markup, and find the URL that follows src=.

   b. Remove the reference to the iframe from the markup. Be sure to copy the source URL.

   ```
   <apex:iframe src="https://www.salesforce.com"/>
   ```

   c. Save your changes.

   d. Follow these instructions, using the same URL that you copied from the iframe in the Visualforce page.

5. If the source of the iframe is another Visualforce page, create a Lightning record page to display both Visualforce pages separately.

   a. Identify the Visualforce page. View the Visualforce markup, and find the page name that follows $src="\$Page$.

   b. Remove the reference to the iframe from the markup. Be sure to make note of the Visualforce page in the iframe.

   ```
   <apex:iframe src="{!$Page.AccountListView}"/>
   ```

   c. Go into the properties of each Visualforce page by clicking $Edit$. Select the **Available for Lightning Experience, Experience Builder sites, and the mobile app** checkbox. Check the checkbox for both Visualforce pages—the original page and the page embedded in the iframe.

   d. Use the Lightning App Builder to drag two Visualforce components onto the canvas.

   e. Save and activate your record page.

These suggestions are meant to guide you in the right direction. If you're unable to find a working solution, post questions to the Lightning Exp Configuration Converter group in the Trailblazer Community. Use the #VisualforceInLightning hashtag to call on our experts.

Replace the window.location Method

The window.location variable is a JavaScript method used to redirect the browser to a new page. JavaScript code in a Visualforce page that sets window.location directly isn't compatible with Lightning Experience. That's the bad news. The good news is that sforce.one navigation methods do the same thing, and are compatible with Lightning Experience.

Because window.location can be used in many ways, it's not possible to address all of the possibilities. Let's look at a case where window.location is used as a link to the edit page for an account. Then you can use this example, including the code samples, as a guide for addressing other occurrences of window.location in your pages. If you can determine what your window.location method is trying to do, chances are a sforce.one workaround exists.

1. Locate window.location in the Visualforce code.

   a. From Setup, enter $Visualforce$ in the **Quick Find** box, then select **Visualforce Pages**.

b. Click **Edit** next to the Visualforce page.

c. Search the Visualforce markup for the following: `window.location`.

```
<apex:page standardController="Account" lightningStylesheets="true">
  <apex:form >
    <apex:pageBlock >
      <apex:pageBlockSection title="Edit">
        <apex:commandButton value="Edit"
         onclick="window.location='/{!Account.Id}/e'; return false;"/>
      </apex:pageBlockSection>
    </apex:pageBlock>
  </apex:form>
  <apex:detail />
</apex:page>
```

2. Determine where window.location is redirecting to. You can figure this out by testing the Visualforce page in Salesforce Classic.

3. Find the appropriate sforce.one method to replace window.location.

4. Replace all instances of window.location with sforce.one navigation.

```
<apex:page standardController="Account" lightningStylesheets="true">
  <apex:form >
    <apex:pageBlock >
      <apex:pageBlockSection title="Edit">
        <apex:commandButton value="Edit"
         onclick="sforce.one.editRecord('{!Account.Id}');"/>
      </apex:pageBlockSection>
    </apex:pageBlock>
  </apex:form>
  <apex:detail />
</apex:page>
```

5. Save your changes.

6. If your Visualforce page is going to be accessed in both Salesforce Classic and Lightning Experience, make both options available. Use an if statement to branch the code.

```
<apex:page standardController="Account" lightningStylesheets="true">
  <script>
    function isLightningExperience(){
        if (UITheme.getUITheme() === 'Theme4d' || UITheme.getUITheme() === 'Theme4u'){
            sforce.one.editRecord('{!Account.Id}');
        } else {
            window.location='/{!Account.Id}/e';
        }
    }
  </script>
  <apex:form >
    <apex:pageBlock >
      <apex:pageBlockSection title="Edit">
        <apex:commandButton value="Edit"
         onclick="javascript:isLightningExperience();return false;"/>
      </apex:pageBlockSection>
    </apex:pageBlock>
```

```
        </apex:form>
        <apex:detail />
</apex:page>
```

These suggestions are meant to guide you in the right direction. If you're unable to find a working solution, post questions to the Lightning Exp Configuration Converter group in the Trailblazer Community. Use the #VisualforceInLightning hashtag to call on our experts.

Replace Static URLs

Lightning Experience doesn't support the use of static URLs to link to Salesforce resources. Fortunately, there's a much better alternative that future proofs your URLs. URLFOR is a function that calculates a URL based on inputs, rather than relying on something static that can't change. Use the URLFOR function with the appropriate action instead of direct URLs.

Because static URLs can be applied in many ways, it's not possible to cover all possibilities. Let's look at a case where a static URL is used to link to the edit page for an account. Then you can use this example, including the code samples, as a guide for addressing other static URLs in your pages.

1. Locate href and .Id} in the Visualforce code.

   a. From Setup, enter `Visualforce` in the **Quick Find** box, then select **Visualforce Pages**.

   b. Click **Edit** next to the Visualforce page.

   c. Search the Visualforce markup for each of the following: `href` and `.Id}`.

```
<apex:page standardController="Account" lightningStylesheets="true">
  <apex:outputLink value="/{!Account.Id}/e" >Edit Account</apex:outputLink>
</apex:page>
```

2. Determine where the static URL is redirecting to. You can figure this out by testing the Visualforce page in Salesforce Classic.

3. Find the appropriate URLFOR action to replace window.location.

4. Replace all static URLs with URLFOR functions.

```
<apex:page standardController="Account" lightningStylesheets="true">
  <apex:outputLink value="{!URLFOR($Action.Account.Edit, Account.Id, null, true)}">Edit
 Account</apex:outputLink>
</apex:page>
```

5. Save your changes.

These suggestions are meant to guide you in the right direction. If you're unable to find a working solution, post questions to the Lightning Exp Configuration Converter group in the Trailblazer Community. Use the #VisualforceInLightning hashtag to call on our experts.

Apply Lightning Stylesheets to Visualforce Pages Manually

With Lightning stylesheets, it's easy to tweak your existing Visualforce pages so they'll display with classic styling in Salesforce Classic and Lightning styling in Lightning Experience.

1. From Setup, enter `Visualforce` in the **Quick Find** box, then select **Visualforce Pages**.

2. Click **Edit** next to the Visualforce page.

3. Add the `lightningStylesheets="true"` attribute to the initial `<apex:page>` component in the Visualforce markup.

EDITIONS

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

USER PERMISSIONS
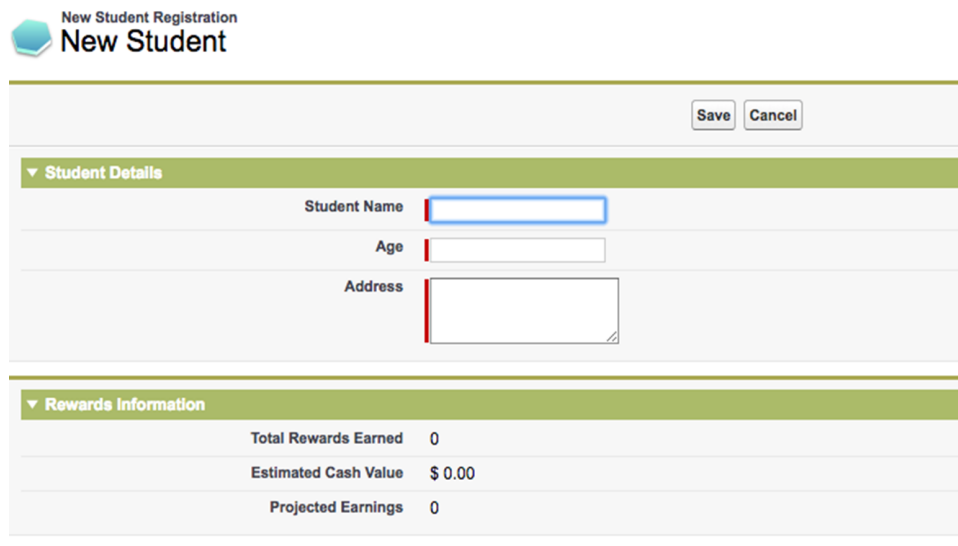
To create, edit, or delete Visualforce pages:
- Customize Application

```
<apex:page standardController="Account" lightningStyleSheets="true">
```

4. Save your changes.

When Lightning stylesheets are applied, here's how a Visualforce page looks in Salesforce Classic.

And here's how the same page appears in Lightning Experience.

New Student Registration
New Student

∨ Student Details

Student Name * [   ]

Age * [   ]

Address * [   ]

∨ Rewards Information

Total Rewards Earned   0

Estimated Cash Value $ 0.00

Projected Earnings   0

SEE ALSO:

Apply Lightning Stylesheets to Visualforce Pages Automatically

Style Existing Visualforce Pages with Lightning Stylesheets in the *Visualforce Developer Guide*

Review AppExchange Packages for Lightning Experience Compatibility

Scan your installed package metadata and prepare your AppExchange packages for Lightning Experience. Find out which packages are ready to go. Get recommendations on updating, replacing, or verifying the rest.

Lightning Ready AppExchange packages work correctly within Lightning Experience.

Some AppExchange packages don't offer Lightning Ready versions. Some buttons, links, and Visualforce pages in these packages don't work in Lightning Experience or aren't visible to users. We sometimes suggest an alternative package that performs the same function and is Lightning Ready. If you have questions about additional configuration steps, functionality, Lightning Experience support, or recommended workarounds for a specific package, contact the package publisher.

1. Log in to the Lightning Experience Configuration Converter, then select the **AppExchange** tab.

2. If your org hasn't been scanned for AppExchange packages before, or if the scan data is out of date, scan to get the latest data.

3. Review the status of each package. Take action based on the status of each package.

Option	Description
No update required	Your active package is ready for Lightning Experience. No further action is required.
Update package	Your active package has a Lightning Experience-supported version available. Update the package to this version.

Option	Description
Review suggested alternative	Your active package has a Lightning Experience-supported alternative available. The alternative isn't the same as your active package, but it performs the same function. Review and install this alternative package.
No update or alternative	Your active package isn't ready for Lightning Experience and there's no suggested alternative. Contact the package publisher for a workaround.
Unable to analyze	We weren't able to analyze whether your active package is ready for Lightning Experience. To confirm that everything is ready for Lightning Experience, perform a manual check on the package.

4. Contact the package publisher in these cases.

- To verify whether additional configuration steps are needed for the app to run in Lightning Experience.
- If you're not sure whether the app is supported for Lightning Experience.
- To learn about any recommended workarounds when the package isn't supported for Lightning Experience.

SEE ALSO:

[Lightning Experience Configuration Converter Considerations](#)

[Scan Your Org for Updates with the Lightning Experience Configuration Converter](#)

[Check Your Org's Readiness for Lightning Experience](#)

Convert Attachments and Classic Notes

Does your org use attachments and notes? In Lightning Experience, users get a better experience if you convert existing attachments to Salesforce Files and classic notes to enhanced notes. You can automate this conversion work with the handy Magic Mover for Notes and Attachments tool.

> **Note:** This tool is a Salesforce Labs app. Salesforce Labs is a program that lets Salesforce engineers, professional services staff, and other employees share AppExchange apps they've created with the customer community. Salesforce Labs apps are free to use, but are not official Salesforce products. They should be considered community projects, which aren't officially tested or documented. For help with a Salesforce Labs app, please consult the Salesforce message boards. Salesforce Support isn't available.

Install [Magic Mover for Notes and Attachments](#) from AppExchange.

EDITIONS

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

Migrate Your Classic Knowledge Base to Lightning Knowledge

If your company uses Classic Knowledge, Lightning Experience users must switch to Salesforce Classic to do things like find or create Knowledge articles. Moving your Classic knowledge base into Lightning Knowledge gives your users a seamless experience and much better workflow. When you're ready, the Lightning Knowledge Migration Tool does most of the heavy lifting for you.

SEE ALSO:

[Lightning Knowledge Migration Tool](#)

Pro Tips for Your Lightning Experience Implementation

Give users a smooth transition to Lightning Experience by making sure the important and necessary parts of your classic implementation are available in the new interface. Here are some tips for integrating your org's data and business-critical customizations with Lightning Experience features. We'll look at ways to avoid common gotchas and work around some of the issues that may have you stumped.

Pro Tip: Harness Your Salesforce Metadata in Lightning Experience

All the information about how your org looks and feels is Salesforce metadata. The metadata from Salesforce Classic seamlessly transitions to Lightning Experience. Help your users feel at home by customizing the way metadata appears.

Pro Tip: Configure Pages That Work for Lightning Experience Users

Help your users get information efficiently in Lightning Experience by customizing pages to fit their needs. Since record pages are easier to customize in Lightning Experience, make a few quick updates to improve user productivity.

Pro Tip: Upgrade Your Salesforce Apps for Lightning Experience

Salesforce apps come in two flavors: Classic and Lightning. Both types of apps are accessible in Lightning Experience. Upgrade your org's Classic apps to Lightning apps to add branding and record views that are tailored to your users.

Pro Tip: Tailor the Activity Timeline in Lightning Experience

Help ensure that sales users have all the information they need to stay on top of their workload. Customize the activity timeline to display details on the events, tasks, logged calls, and sent emails linked to a record.

Pro Tip: Boost Productivity with Activity Actions in Lightning Experience

You can help everyone feel at home in Lightning Experience by ensuring that the activity actions and buttons your users use every day are easily accessible. Create and delete actions to tailor Lightning Experience to your users' workflow. Use the Lightning Experience Configuration Converter to maintain the action and button configuration you had in Salesforce Classic.

Pro Tip: Simplify File Management with Salesforce Files

The Lightning Experience Files feature unifies all your users' files, documents, content, and attachments into a single system for easier management, collaboration, and access. Transition your org to Files to integrate file access into your business flow.

Pro Tip: Boost Note-Taking with Enhanced Notes

One benefit of moving your company to Lightning Experience is how much more efficient it is to do everyday functions. Your users already rely on notes to stay organized. With enhanced Notes in Lightning Experience, everyone can create better notes faster from anywhere.

Pro Tip: Harness Your Salesforce Metadata in Lightning Experience

All the information about how your org looks and feels is Salesforce metadata. The metadata from Salesforce Classic seamlessly transitions to Lightning Experience. Help your users feel at home by customizing the way metadata appears.

In Salesforce Classic, you found Chatter, related lists, and record details on your record pages. This metadata is in the same place in Lightning Experience but it's presented differently. Metadata is stored in Lightning components that you can rearrange to suit your needs. Headers hold metadata along with standard and custom buttons. Find metadata easily when you get familiar with Lightning pages.

- Find Your Way Around Records in Lightning Experience.
- Find Your Way Around Related Lists in Lightning Experience.

- *Find Your Way Around Chatter in Lightning Experience*.

Page and compact layouts determine the organization of metadata. To rearrange the metadata for an object, select it in the Object Manager as needed. Open page layouts to edit the metadata in Lightning record detail, related list, and other components on a record page. Open compact layouts to edit the metadata in an object's record page header.

Next Steps: Arrange Metadata in Lightning Experience

- To get started, find object management settings in Lightning Experience.
- Change the metadata in page headers after becoming familiar with compact layouts.
- Change the metadata in Lightning components after reviewing how page layouts elements display in Lightning Experience.

Pro Tip: Configure Pages That Work for Lightning Experience Users

Help your users get information efficiently in Lightning Experience by customizing pages to fit their needs. Since record pages are easier to customize in Lightning Experience, make a few quick updates to improve user productivity.

You can add and edit record pages to fit the workflow.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
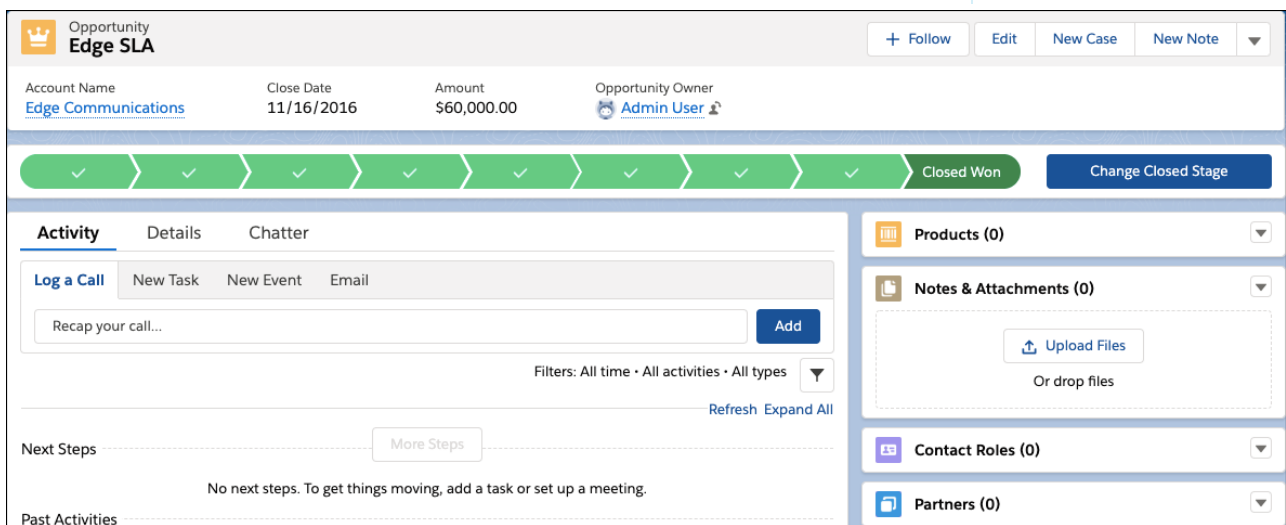
- Give users access to record information at a glance with a customized highlights panel (1).

- Move actions from the dropdown to make them more accessible from the highlights panel (2).

- Help users visualize their progress by adding the Path component if it's not already there (3).

- The first tab users see on their record is the one set as the default for their record page (4). Save your users clicks by setting their favorite tab as the default.

- The Related List component takes up a lot of room. Give users more space for the content they care about by changing the way they view related lists.

  - View all related lists as quick links with the Related List Quick Links component (5).

  - Focus on one related list by adding a Related List - Single component (6).

Next Steps: Customize Your Pages

- Get familiar with standard Lightning page components.

- Use the Lightning App Builder to build custom record pages for your users.

  - Change the number of actions visible in the highlights panel component.

  - Add a Path component to your lead and opportunity pages.

  - Change the default tab for your record's home page.

  - Add the Related List Quick Links component or a Related List - Single component.

- Compact layouts drive the fields that users see in the highlights panel. Create a custom compact layout for an object to reflect the fields that your users most need to see in the highlights panel.

Pro Tip: Upgrade Your Salesforce Apps for Lightning Experience

Salesforce apps come in two flavors: Classic and Lightning. Both types of apps are accessible in Lightning Experience. Upgrade your org's Classic apps to Lightning apps to add branding and record views that are tailored to your users.

Classic apps are created and managed in Salesforce Classic. Lightning apps are created and managed in Lightning Experience. You can customize both types of apps, but Lightning apps include more features to match the way your users work.

- Create record views that are tailored to your users' needs.
- Include Lightning page tabs in an app's navigation bar for quick access.
- Display productivity tools, like Notes, Recent Items, and Sales Dialer, by adding a utility bar.
- Customize an app with a unique theme.

Find all your apps in the App Launcher.
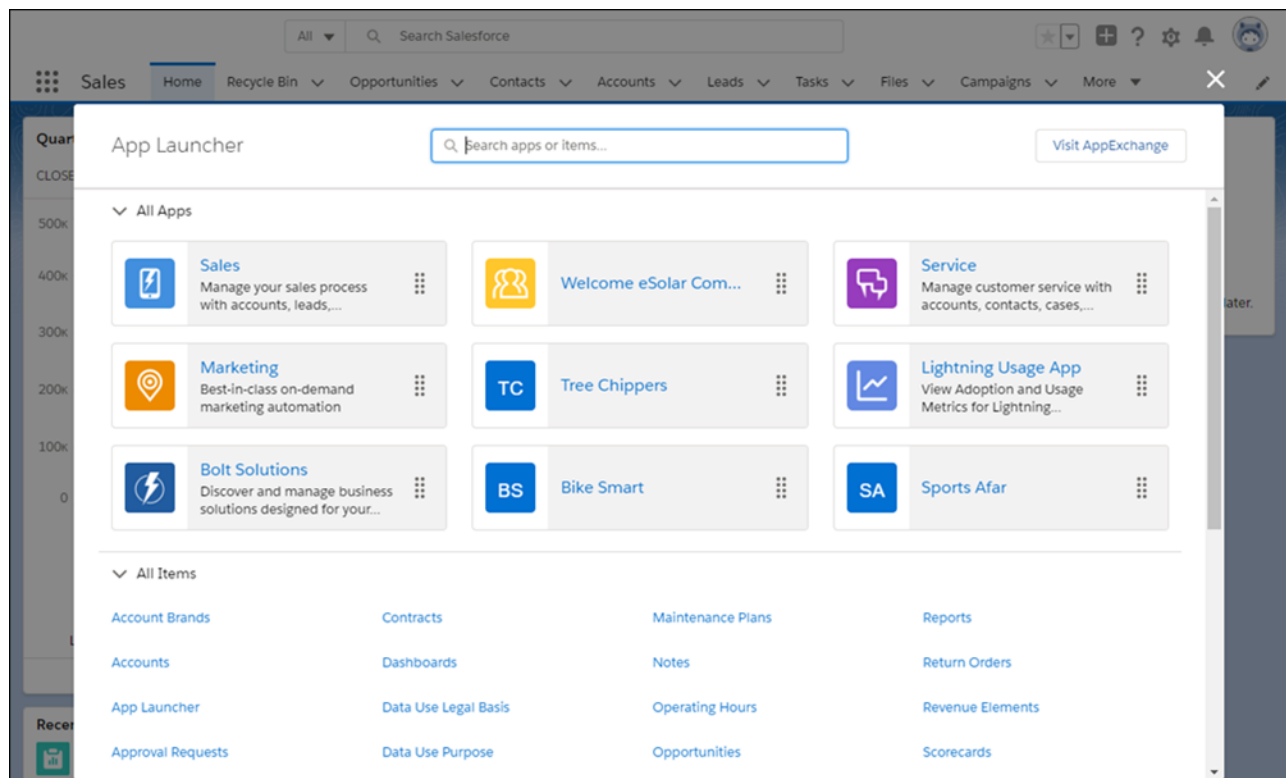
All your org's custom Classic apps and most of your org's standard Classic apps are available in Lightning Experience. Most Classic console apps have been replaced by standard Lightning apps. If a Classic console app isn't available in Lightning Experience, you can recreate it with the Lightning App Builder.

Next Steps: Make the Move to Lightning Apps

- Find out more about Lightning apps.
- Upgrade Classic apps to Lightning apps. The upgrade process turns a copy of your Classic app into a Lightning app, leaving the original version untouched.
- If your users use Classic console apps regularly, recreate them as Lightning apps.

- Follow the instructions to create Lightning apps when you make new apps for your org.
- Consult Salesforce App considerations to avoid complications.
- When you no longer need a custom Classic app, remove it from the Lightning Experience App Launcher.

Pro Tip: Tailor the Activity Timeline in Lightning Experience

Help ensure that sales users have all the information they need to stay on top of their workload. Customize the activity timeline to display details on the events, tasks, logged calls, and sent emails linked to a record.

The Activity Timeline includes easy-to-scan summaries for the activities users normally see in the Open Activities and Activity History related lists. Sales reps can view past, present, and future activities at a glance on all standard and custom object records. Users can still access related lists as they did in Salesforce Classic.

> **EDITIONS**
>
> Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
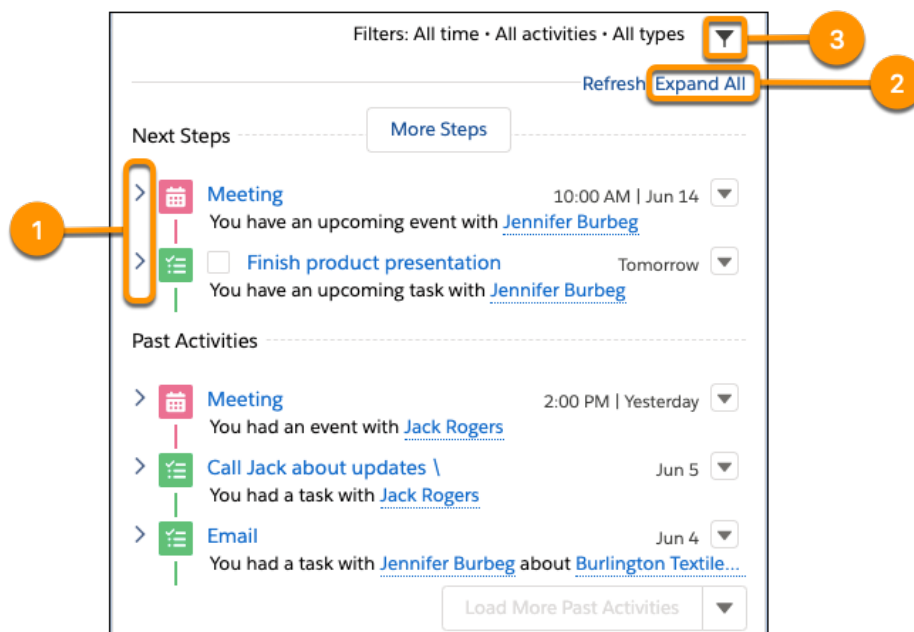
Click the arrow next to an individual activity (1) for a closer look at its description and comment fields. Or click **Expand All** (2) to see details for all activities in the timeline. You can choose to see only the activities that matter by filtering your timeline (3).

You can't configure the first two rows of the activity timeline, but they were designed with sales rep performance in mind. For tasks, the first row (1) displays the task's subject and due date. For events, it shows the subject and start date. And for logged calls and sent emails, it shows the subject and the logged or sent date. The second row (2) summarizes the activity. The summary is automatically generated to show the most useful information for the current context.

You can customize what sales reps see in the details section (3) by changing the compact layout for the current object. The details section is visible when an activity is expanded and includes fields from the activity's compact layout.
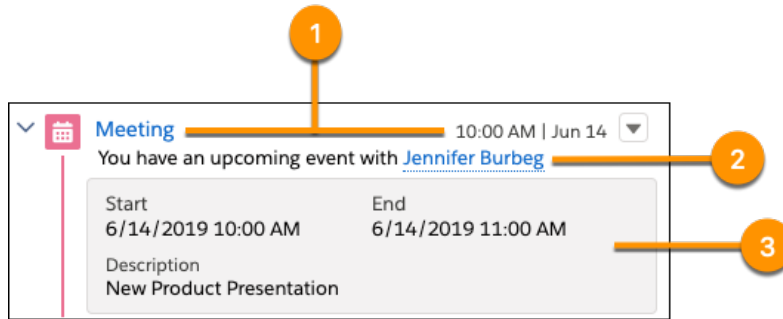
Next Steps: Customizing the Activity Timeline

- Review Activity Timeline Customization Considerations.
- Follow the steps in Customize the Fields that Display on Tasks in the Activity Timeline.
- Check out Create Compact Layouts for more details on customizing activity details.
- View Notes on Compact Layouts to avoid complications.

Pro Tip: Boost Productivity with Activity Actions in Lightning Experience

You can help everyone feel at home in Lightning Experience by ensuring that the activity actions and buttons your users use every day are easily accessible. Create and delete actions to tailor Lightning Experience to your users' workflow. Use the Lightning Experience Configuration Converter to maintain the action and button configuration you had in Salesforce Classic.

In Salesforce Classic, a new page opens every time a user starts a new activity. In Lightning Experience, users can access activity actions right on a record home page using the activity composer. With the activity timeline and the activity composer, users can view easy-to-scan activity summaries and start new activities in the same place.

<div style="border:1px solid #ccc; padding:8px; display:inline-block;">

EDITIONS

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

</div>
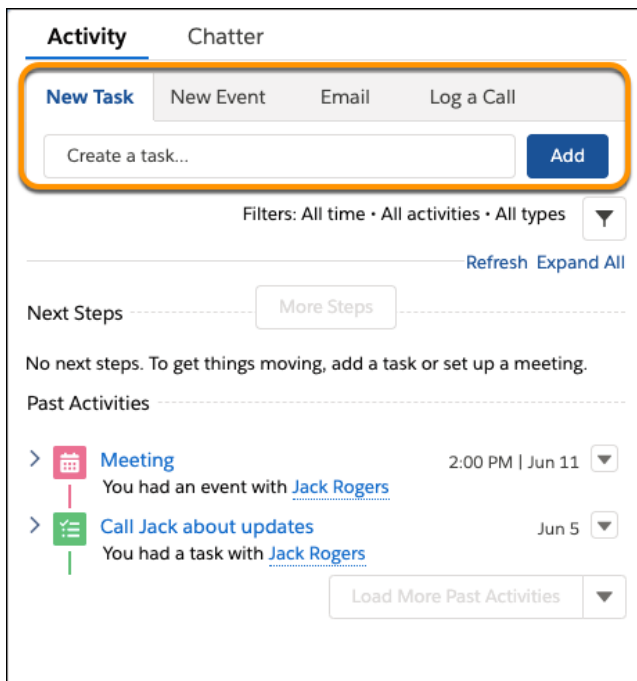
Provide users with the familiarity of your Salesforce Classic configuration by migrating the configuration to Lightning Experience. Use the Lightning Experience Configuration Converter to bring your actions and buttons from Salesforce Classic into Lightning Experience.

> **Note:** The Lightning Experience Configuration Converter moves standard and custom buttons from Salesforce Classic. It also automates adjustments to a variety of features, including JavaScript buttons and Visualforce pages.

Next Steps: Configure Your Activity Actions

- Get Started with the Lightning Experience Configuration Converter.
- Review Lightning Experience Configuration Converter Considerations to avoid gotchas.
- Customize Actions with the Enhanced Page Layout Editor
  - Remove the activity actions that your users no longer need.
  - Arrange actions to fit your users' workflow.
- Create Object-Specific Quick Actions.

Pro Tip: Simplify File Management with Salesforce Files

The Lightning Experience Files feature unifies all your users' files, documents, content, and attachments into a single system for easier management, collaboration, and access. Transition your org to Files to integrate file access into your business flow.

In Salesforce Classic, you used documents to store assets, like logos, and you could associate an attachment only to a record. Files in Lightning Experience gives users more ways to share and access information. In Lightning Experience, users can upload their files to Files Home for storage and sharing. Users can share a file by attaching it to a Chatter post, profile, record, or group. When you add the Files related list to a page layout, users can access Files features on pages throughout the app.

Salesforce Classic files are available in Lightning Experience in Files Home and on associated records under the Files related list. Salesforce CRM content libraries are automatically converted to Files and accessible from Files Home via the Libraries filter.

Use Salesforce tools to convert your org's attachments and documents. Find your converted files in Files Home or Files related lists.

Next Steps: Convert Attachments and Documents

- To optimize access to your files throughout the app, Add the Files Related List to Page Layouts.

- Review the Magic Mover for Notes and Attachments documentation under Customization Guides. Before using the Magic Mover, enable enhanced Notes so that users maintain information in their notes.
- Follow the steps in Moving Documents to Salesforce Files.
- Find out more about working with Files in Lightning Experience.

Pro Tip: Boost Note-Taking with Enhanced Notes

One benefit of moving your company to Lightning Experience is how much more efficient it is to do everyday functions. Your users already rely on notes to stay organized. With enhanced Notes in Lightning Experience, everyone can create better notes faster from anywhere.

In Salesforce Classic, the Notes & Attachments related list is an outdated version of the new Notes. In Lightning Experience, enhanced Notes offers more versatility and is optimized for Lightning Experience. Users can:
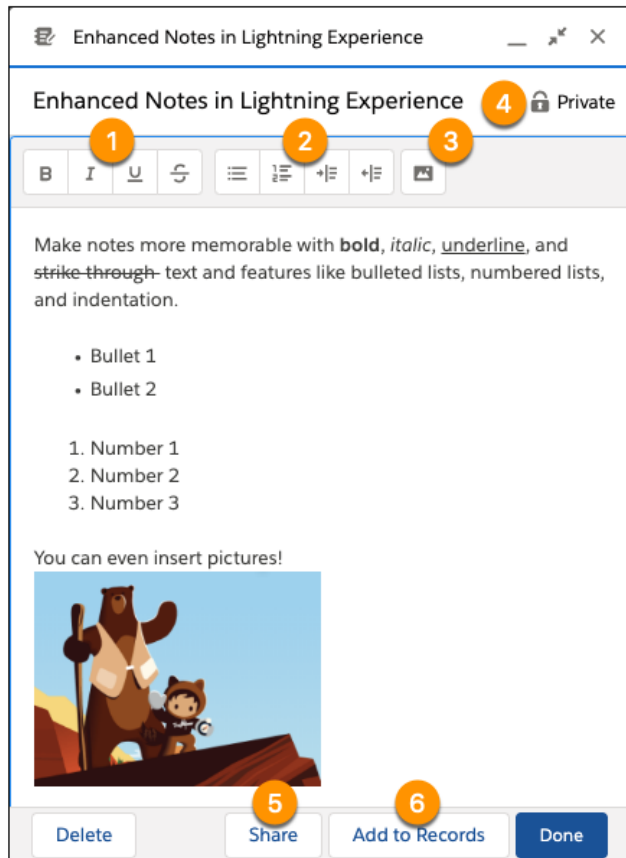
- Highlight important details with rich text formatting, like bold and italic (1).
- Organize content with bulleted and numbered steps (2).
- Add clarity and memorability by embedding images (3).
- Keep sensitive notes or selectively share with the appropriate people (4).
- Share notes with people or groups to increase collaboration (5).
- Relate a note to multiple records to expand the visibility and impact of important information (6).

Add enhanced notes in areas throughout an app to improve your org's productivity. Include note-taking actions in the Lightning Experience header, the highlights panel on records, and Lightning app utility bars. Add the Notes item to the navigation bar of your Lightning apps to give users access to the Notes home page. Manage all notes on the Notes home page, whether they're related to records or not.

Next Steps: Add Notes Throughout Lightning Experience

Before you add notes to Lightning Experience, make sure that users can access their notes and attachments in the new interface.

- Enable Notes.
- Review the Magic Mover for Notes and Attachments documentation under Customization Guides. Before using the Magic Mover, add the Files related list to page layouts.
- Add the Notes Related List to Page Layouts.
- Add a Utility Bar to Lightning Apps and include Notes in your footer.
- Add the Notes home page to your navigation bar.
- Find out more about working with Notes in Lightning Experience.

Launch Lightning Experience to Your Users

When it's launch time, set up access to Lightning Experience for the intended group of users. If you're doing a "big bang" rollout, set up everyone in your org. But if you're taking a phased approach, set up just the users for your pilot group (and so on).

> 📝 **Note:** On January 7, 2020, the Turn on Lightning Experience critical update automatically enabled Lightning Experience for orgs that hadn't already done so. So that's one less thing for you to do in the rollout phase! If you want to confirm that Lightning Experience is on for your org, use the Lightning Experience Transition Assistant. See Verify that Lightning Experience is Turned On for more details.

<div style="float:right; border:1px solid #ccc; padding:10px;">

EDITIONS

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

</div>

Set Up User Access to Lightning Experience

As you execute your rollout plan to launch Lightning Experience, make sure that the right users are getting access to the new interface. You can fine-tune access with permission sets and custom profiles, which is great for doing a phased rollout to a pilot group or specific teams of users. Or go for it and set your entire organization loose if things are ready for everyone. 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.

Make Lightning Experience the Default Interface

Give users who are trained and ready to work in Lightning Experience a head start. Use the Switch Users tool in the Lightning Experience Transition Assistant to assign the new interface as a user's default experience, on a user-by-user basis.

SEE ALSO:

Supported Editions and User Licenses for Lightning Experience

Set Up User Access to Lightning Experience

As you execute your rollout plan to launch Lightning Experience, make sure that the right users are getting access to the new interface. You can fine-tune access with permission sets and custom profiles, which is great for doing a phased rollout to a pilot group or specific teams of users. Or go for it and set your entire organization loose if things are ready for everyone. 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. 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.

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 usually include the permission.

Custom profile users: Decide who gets Lightning Experience access now and who you'll set up later. Consider these options.

- Want to roll out Lightning Experience to a subset of custom profile users without giving access to everyone assigned to the profile? Create a permission set that includes the Lightning Experience User permission. Then apply the permission set to the desired users.

- Ready to roll out Lightning Experience to everyone assigned to a specific custom profile? Or do you want 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 for users.

  > **Tip:** If you have experience with Data Loader, 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.

- Have you created any custom profiles by cloning a standard profile? Starting with Winter '16, custom profiles inherit the Lightning Experience User permission from standard profiles. You can edit these profiles to disable the user permission, as needed.

Standard profile users: If you're not ready for some of these users to access Lightning Experience yet, move them to custom profiles that don't include the Lightning Experience User permission.

> **Note:** 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 the same rollout group. See Considerations for Switching Between Lightning Experience and Salesforce Classic for more details. See Considerations for Switching Between Lightning Experience and Salesforce Classic for more details.

What Happens When Users Get Access to Lightning Experience

- Users who existed when Lightning Experience was turned on

  All users who existed at the time Lightning Experience was enabled retain Salesforce Classic as their default interface. This is true whether a user already had the Lightning Experience User permission or was assigned the user permission at a later date. It doesn't matter if the user permission is assigned via a standard profile, a custom profile that has the permission enabled, or a permission set.

- Users added after Lightning Experience is turned on

  Things change for users who are added to your org after Lightning Experience was enabled. These users get Lightning Experience as their default interface when they're assigned the Lightning Experience User permission—whether at the time they're added to the system or at a later date. Again, it doesn't matter if the user permission comes from a standard profile, a custom profile that has the permission enabled, or a permission set.

Lightning Experience-enabled users can continue accessing Salesforce Classic! These users automatically get the Switcher, which allows them to switch between the new and classic interfaces, as needed.

Manage Access to Salesforce Classic

When you're ready for users to call Lightning Experience home, there are several options for driving adoption. Choose what's right for each user.

- Encourage users to stay in Lightning Experience by automatically switching them out of Salesforce Classic on a daily or weekly schedule. Users can return to the classic interface, but they'll keep getting switched back to Lightning Experience at the next scheduled interval. See Encourage Users to Stay in Lightning Experience.

- Start cutting the chord to Salesforce Classic. For users who have everything they need in the new interface, remove the Switcher link. See Make Lightning Experience the Only Experience for Some Users.

- When you're ready for everyone to dive into Lightning Experience without looking back, turn off Salesforce Classic access altogether. See Turn Off Salesforce Classic for Your Org.

SEE ALSO:

Profiles

Permission Sets

Lightning Experience at Your Pace (video)

Salesforce Classic Doesn't Go Away When You Move Users to Lightning Experience

Considerations for Switching Between Lightning Experience and Salesforce Classic

Make Lightning Experience the Default Interface

Make Lightning Experience the Default Interface

Give users who are trained and ready to work in Lightning Experience a head start. Use the Switch Users tool in the Lightning Experience Transition Assistant to assign the new interface as a user's default experience, on a user-by-user basis.

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

2. Select the Roll Out phase.

3. Click **Launch Lightning Experience** to expand the stage.

4. Click **Switch Users** next to **Make Lightning Experience the default interface**.

   You see at a glance which users have the Lightning Experience User permission and can be switched, 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.

5. Click the ✚ button next to the users you want to switch.

6. Save your selections.

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

> 📝 **Note:** Ready to start turning off access to Salesforce Classic? See Make Lightning Experience the Only Experience for Some Users.

EDITIONS

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

USER PERMISSIONS

To use the Lightning Experience Transition Assistant:
- View Setup and Configuration

  AND

  Customize Application

Verify that Lightning Experience is Turned On

On January 7, 2020, the Turn on Lightning Experience critical update automatically enabled Lightning Experience for orgs that hadn't already done so. To verify that Lightning Experience is turned on for your org, use the Lightning Experience Transition Assistant.

1. From Setup, select the Transition Assistant tile at the top of the menu (1).
2. Select the Roll Out phase (2).
3. Click **Launch Lightning Experience** to expand the stage (3).

After Lightning Experience is turned on for your org, the **Turn on Lightning Experience** toggle (4) is unavailable. It's not possible to disable Lightning Experience after it has been turned on.

When Lightning Experience is enabled, users who have the Lightning Experience User permission can switch themselves between Lightning Experience and Salesforce Classic, as needed.

SEE ALSO:

Salesforce Classic Doesn't Go Away When You Move Users to Lightning Experience

Disable Lightning Experience

As of Winter '20, Lightning Experience is permanently enabled after it's been turned on in your org. This is true whether Lightning Experience was enabled by an admin at your company, via a Salesforce auto-transition journey, or by the Turn on Lightning Experience critical update that auto-activated on January 7, 2020. After Lightning Experience is turned on, you can't disable it from the Lightning Experience Transition Assistant or using any version of Metadata API. Users still have access to Salesforce Classic and can switch between the two interfaces as needed.

Optimize Phase: Make Lightning Experience Stick

The transition project doesn't end when you give users access to Lightning Experience. Busy people aren't always eager for change, so keep an eye on adoption rates and encourage users to stay in the new interface. This is also the time to iterate on your rollout plan by moving over more users, adding new features and use cases, and looking for ways to improve your implementation. And when the day comes to turn off access to Salesforce Classic, you can call your transition a success!

Measure the Success of Your Lightning Experience Transition

After you roll out Lightning Experience to users, monitor that you're hitting your goals, improving business, and getting traction with users. Collect user feedback to see what's working and what's not. The Lightning Experience Transition Change Management Hub has options for doing surveys. And track adoption metrics, like daily active users and number of users switching to Salesforce Classic, with the Lightning Usage App.

Motivate Users to Work in Lightning Experience

Because busy people don't always have time for change, you may need to encourage your users to make the switch to Lightning Experience. Automate some of this effort with out-of-the-box onboarding and assistance options that show the productivity benefits from working in the new interface.

Iterate on Your Lightning Experience Rollout Plan

After rolling out Lightning Experience to a group of users and getting insights from feedback and success metrics, iterate for the next group. Update the rollout plan to reflect lessons learned. Give the next group a better experience by addressing the critical issues that are affecting current Lightning Experience users. And check for new features and innovations to see if there are other use cases to consider for the plan. We also recommend running Salesforce Optimizer to find opportunities for improving your org. Even if you aren't doing a phased rollout, this is a good time to look for ways to clean up and enhance your implementation.

Turn Off Salesforce Classic for Your Org

When all your users are working in Lightning Experience and everyone has the features and functionality they need, proclaim your Lightning Experience transition a success. Mark the occasion—and stop supporting two interfaces—by turning off your org's access to Salesforce Classic.

Measure the Success of Your Lightning Experience Transition

After you roll out Lightning Experience to users, monitor that you're hitting your goals, improving business, and getting traction with users. Collect user feedback to see what's working and what's not. The Lightning Experience Transition Change Management Hub has options for doing surveys. And track adoption metrics, like daily active users and number of users switching to Salesforce Classic, with the Lightning Usage App.

Get Lightning Experience Adoption Insights with the Lightning Usage App

After moving users to Lightning Experience, make sure that they're committed to working in the new interface. The Lightning Usage App lets you monitor adoption metrics, such as daily active users and the most visited pages in Lightning Experience. You can also track the number of your active licenses. These insights help you understand your users' needs so that you can focus on the issues that really matter.

Get Lightning Experience Adoption Insights from Custom Reports

Lightning Usage App objects are available for custom reports. To build your own custom reports, first create a custom report type.

SEE ALSO:

Manage Change With the Lightning Experience Transition Change Management Hub

Get Lightning Experience Adoption Insights with the Lightning Usage App

After moving users to Lightning Experience, make sure that they're committed to working in the new interface. The Lightning Usage App lets you monitor adoption metrics, such as daily active users and the most visited pages in Lightning Experience. You can also track the number of your active licenses. These insights help you understand your users' needs so that you can focus on the issues that really matter.

To access the Lightning Usage App, from the App Launcher (:::), find and open **Lightning Usage**. From the app, click a tab in the ACTIVITY or USAGE section on the left side of the page to view the associated data (1).

You can also open the Salesforce Optimizer from the link at the top of any page in the Lightning Usage App to find ways to optimize your Salesforce implementation (2).
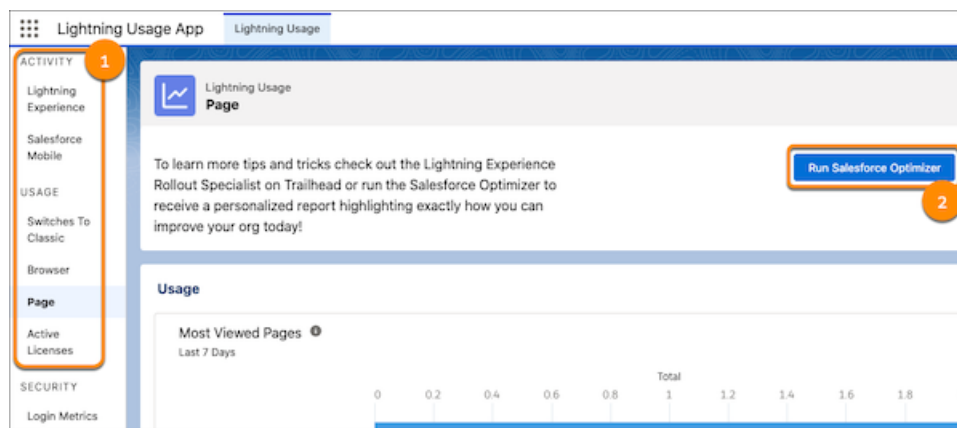
The metrics available in the Lightning Usage App include:

- Daily and monthly active users in Lightning Experience and the Salesforce mobile app
- Daily and monthly switches to Salesforce Classic by total number of switches and the number of unique users that switched
- Profiles and users that switched to Salesforce Classic the most
- Types of browsers used to access Lightning Experience and the Salesforce mobile app
- Slowest desktop record pages
- Pages viewed most often in Lightning Experience
- Number of active user, feature, and permission set licenses

You can't export data in the Lightning Usage App to reports from the UI. Use the Lightning Usage App API to export this data.

SEE ALSO:

Get Lightning Experience Adoption Insights from Custom Reports

Monitor Logins with the Lightning Usage App

Get Lightning Experience Adoption Insights from Custom Reports

Lightning Usage App objects are available for custom reports. To build your own custom reports, first create a custom report type.

📝 **Note:** No Lightning Usage App object is available for login metrics.

Here are sample use cases for each Lightning Usage App object, along with the sample custom report type required to support it.

Use Case	Object	Description	Custom Report Type
Users That Most Frequently Switch Back to Salesforce Classic, Grouped by Manager, Role, or Profile	LightningToggleMetrics	Represents users who switched between Lightning Experience and Salesforce Classic.	Users with Lightning Toggle Metrics
Users Not in Lightning Experience, Grouped by Manager, Role, or Profile	LightningUsageByAppTypeMetrics	Represents number of users on Lightning Experience and Salesforce Mobile.	Users with or without Lightning Usage by App Type Metrics
Performance of Pages with Highest Traffic, Grouped by Browser	LightningUsageByBrowserMetrics	Represents Lightning Experience usage grouped by user's browser.	Lightning Usage By Browser Metrics
Standard Lightning Pages Most Frequently Viewed, Grouped by User, Role, or Profile	LightningUsageByPageMetrics	Represents standard pages users viewed most frequently in Lightning Experience.	Users with Lightning Usage by Page Metrics
Pages from which Users Most Frequently Switch Back to Salesforce Classic, Grouped by Date	LightningExitByPageMetrics	Represents standard pages users switched from Lightning Experience to Salesforce most frequently.	Lightning Exit By Page Metrics

SEE ALSO:

Get Lightning Experience Adoption Insights with the Lightning Usage App

Create a Custom Report Type

Build a Report

Motivate Users to Work in Lightning Experience

Because busy people don't always have time for change, you may need to encourage your users to make the switch to Lightning Experience. Automate some of this effort with out-of-the-box onboarding and assistance options that show the productivity benefits from working in the new interface.

EDITIONS

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

Try Lightning Experience Now Prompt

For users that aren't taking advantage of the new interface, this prompt reminds them that they can work smarter and faster in Lightning Experience.

Switch to Salesforce Classic Feedback Form

When users switch back to Salesforce Classic, ask them why. Responses are collected in a public Chatter group. Evaluate the feedback to see if there are Lightning Experience features that users aren't aware of, or if there are problems with the current implementation. You can customize the question, how frequently the form appears, and where the feedback is stored.

Lightning Experience Welcome Mat

Help onboard users to Lightning Experience with getting started resources, delivered in a friendly welcome mat. There are two welcome mat options: one that appears when a user logs in to Lightning Experience for the first time and one that displays when a user is automatically switched from Salesforce Classic to Lightning Experience. You can customize the welcome mats to deliver content that's specific to your business and your users' roles.

Encourage Users to Stay in Lightning Experience

Drive adoption of the new interface by automatically switching users from Salesforce Classic to Lightning Experience on a regular schedule. You can use the Scheduled Switcher tool to switch users upon login on a daily or weekly basis.

Make Lightning Experience the Only Experience for Some Users

Ready for some of your users to go all in on Lightning Experience? Keep them in the new interface by removing the option to switch back to Salesforce Classic.

SEE ALSO:

Customize the Help Menu in Lightning Experience

In-App Guidance

Try Lightning Experience Now Prompt

For users that aren't taking advantage of the new interface, this prompt reminds them that they can work smarter and faster in Lightning Experience.
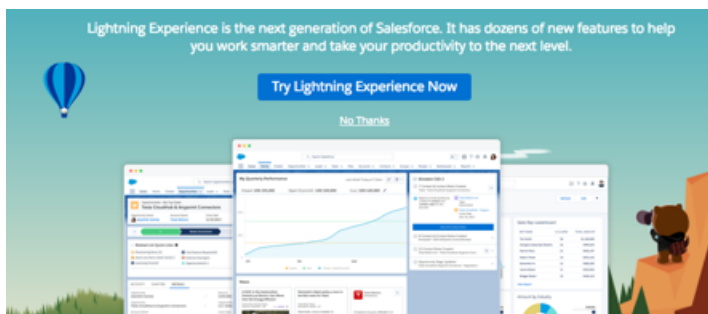
To control this prompt:

- From Setup in Lightning Experience, enter and select **Adoption Assistance** in the Quick Find box.

Try Lightning Experience Now Prompt	
Who sees the prompt?	When the user is working in Salesforce Classic, the prompt appears for: • Any production org with Lightning Experience turned on • Any user who has the Lightning Experience User perm, which grants access to Lightning Experience If your org hasn't opted into extended Internet Explorer 11 support for Lightning Experience, anyone using IE11 doesn't see this prompt.
How often does the prompt appear?	If the user closes the prompt rather than clicking **Try Lightning Experience Now** or **No Thanks**, it appears up to two more times with a 24-hour period between each appearance. If either option is clicked, the prompt isn't seen again.
What options do users have?	When the prompt first appears, the user is given the option to switch to Lightning Experience. If the user clicks **No Thanks**, a survey question appears. If the prompt is closed, it appears up two more times with a 24-hour period between each appearance.
Can the prompt be disabled on the Adoption Assistance setup page?	Yes
Is the prompt enabled by default?	Yes
Can I display in sandbox?	No, the Try Lightning Experience prompt is disabled for sandbox orgs.

Switch to Salesforce Classic Feedback Form

When users switch back to Salesforce Classic, ask them why. Responses are collected in a public Chatter group. Evaluate the feedback to see if there are Lightning Experience features that users aren't aware of, or if there are problems with the current implementation. You can customize the question, how frequently the form appears, and where the feedback is stored.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
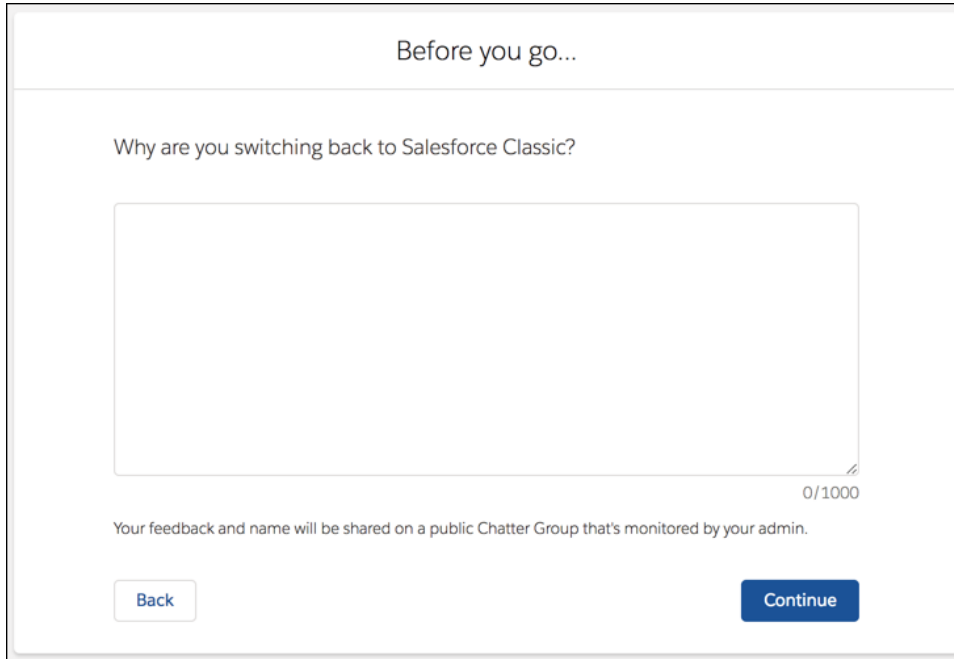
To control the feedback form:

- From Setup in Lightning Experience, enter and select **Adoption Assistance** in the Quick Find box.

Switch to Salesforce Classic User Feedback Form	
What triggers the form to appear?	When a user switches from Lightning Experience to Salesforce Classic.
How often does the form appear?	Choose from every switch or specify the number of days between showing the feedback form. For example, if you enter 1, a user sees a form upon switching. They don't see another form upon switching until one day later.
Which options do users have?	When the form appears, users can optionally enter feedback on why they wanted to switch and click **Continue** to go to Salesforce Classic. Users aren't required to add feedback before switching back to Salesforce Classic. Users could also close the form or click **Back** to return to Lightning Experience.
Is the form enabled by default?	No
Can I customize the question asked on the feedback form?	Yes. However, only the default question is translated into all supported languages. If you use a custom question, the text appears exactly as you've written it. You can always return to the default question by deselecting **Ask a custom question**.
Where is the feedback stored?	In a public Chatter group of your choice. Users are notified that their feedback is posted in a public Chatter group.
Can I display in sandbox?	Yes. If you enable the feature, the Switch to Classic form appears to sandbox users when the form is triggered.

Lightning Experience Welcome Mat

Help onboard users to Lightning Experience with getting started resources, delivered in a friendly welcome mat. There are two welcome mat options: one that appears when a user logs in to Lightning Experience for the first time and one that displays when a user is automatically switched from Salesforce Classic to Lightning Experience. You can customize the welcome mats to deliver content that's specific to your business and your users' roles.

To control the welcome mat:

- From Setup in Lightning Experience, in the Quick Find box, enter Adoption Assistance, and then select **Adoption Assistance**.

Lightning Experience Welcome Mat	
Who sees the mat?	The welcome mat appears to users who have the Lightning Experience User permission. The welcome mat doesn't appear to admins with the Modify All Data or Customize Application user permission. If you're an admin, consider checking out personalized onboarding and resources in the Guidance Center.
How often does the mat appear?	For new Lightning Experience users, the welcome mat appears only one time, the first time they log in to Lightning Experience. Users open the help menu for more Getting Started resources.

Lightning Experience Welcome Mat	
	The automatically switched welcome mat appears each time a user is switched to Lightning Experience. For more details about this feature, see Encourage Users to Stay in Lightning Experience.
What options do users have?	Users can explore the suggested resources. They can also close the welcome mat.
Can the mat be disabled on the Adoption Assistance setup page?	For the first-time users, yes. For the automatically switched users, no. However, you can disable automatic switching from the Migration Assistant or the settings window in the In-App Guidance Setup page.
Is the mat enabled by default?	Yes, both welcome mats are enabled by default.
Can I customize the mats?	Yes, you can customize both welcome mats. When you customize a welcome mat, you replace all its default content. However, you can include Salesforce resources in your custom welcome mat. Your custom content is hosted on your own server. Copy the URL of the new customized welcome mat into the URL field on the Setup page. For steps and examples on welcome mat customization, see Customize Lightning Experience Welcome Mats. Both welcome mats are updated when you use custom content. You can use parameters to customize the content of the welcome mats individually. If you want to return the welcome mats to their default content, select **Default** from the dropdown menu.
Can I display in sandbox?	No, the Try Lightning Experience prompt is disabled for sandbox orgs.

SEE ALSO:

Customize Lightning Experience Welcome Mats

Encourage Users to Stay in Lightning Experience

Customize Lightning Experience Welcome Mats

Give your users a better onboarding experience by customizing the Lightning Experience welcome mats to include resources that are directly relevant to your business and their roles. You can include specific help resources from Salesforce or resources that your company creates. Make it even more personal by showing different welcome mats depending on several factors, like profile, language, or if the user has been automatically switched to Lightning Experience.

Two different welcome mats appear: one when a user first logs in to Lightning Experience, and another when a user is automatically switched from Salesforce Classic to Lightning Experience.

Both types of welcome mats are updated when you use custom content. You can use parameters to customize the content of the welcome mats individually. If you want to return both welcome mats to their default content, select **Default** from the dropdown menu.

EDITIONS

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

> 💡 **Tip:** Here's some ideas for custom content:
> - Branded welcome message
> - Video tutorial of your org
> - Quick reference guide
> - Trailmix

1. Review the guidelines and examples in Welcome Mat component of the Lightning Design System. Use the Salesforce Lightning Design System (SLDS) to easily create a welcome mat that fits right in with the look of Lightning Experience—but that contains your own content.

2. To control who sees the welcome mat, add more parameters and values.

1.

Parameter	Type	Description
isAdmin	integer	This parameter was deprecated in Winter '21. The welcome mat is hidden from admins.
profile	string	Display the welcome mat to a specific profile by specifying a user profile name. Only enter an alphabetic string.
orgID	string	Display the welcome mat to a specific org by specifying an org ID. Must be 15 or 18 characters long and must start with 00D.
userID	string	Display the welcome mat to a specific user by specifying a user ID. Must be 15 or 18 characters long and must start with 005.
language	string	Display the welcome mat to users who speak a specific language. Supported values are: • bg (Bulgarian) • cs (Czech) • da (Danish) • de (German) • el (Greek) • en_GB (English UK) • en_US (English) • es_MX (Spanish Mexico • es (Spanish) • fi (Finnish) • fr (French) • hr (Croatian) • hu (Hungarian) • in (Indonesian)

Parameter	Type	Description
		• *it* (Italian)
		• *ja* (Japanese)
		• *ko* (Korean)
		• *nl_NL* (Dutch)
		• *no* (Norwegian)
		• *pl* (Polish)
		• *pt_BR* (Portuguese Brazil)
		• *pt_PT* (Portuguese European)
		• *ro* (Romanian)
		• *ru* (Russian)
		• *sk* (Slovak)
		• *sl* (Slovenian)
		• *sv* (Swedish)
		• *th* (Thai)
		• *tr* (Turkish)
		• *uk* (Ukrainian)
		• *vi* (Vietnamese)
		• *zh_CN* (Chinese Simplified)
		• *zh_TW* (Chinese Traditional)
isRedirected	integer	Display the welcome mat when users have been automatically switched through the admin setting. Supported values are *0* for first-time users and *1* for automatically switched users.
isSandbox	integer	Display in production or sandbox environment. Supported values are *0* for production and *1* for sandbox. 📝 Note: For the welcome mat to be displayed in sandbox, first log into your sandbox org. Turn on **Adoption Assistance in Sandbox Orgs** on the **Adoption Assistance** setup page.

3. Add *id* to the *<a>* tags for each tile so you can show or hide the tile based on the parameters. For example, add *id="slds-welcome-mat__tile_1"* to the first tile.

```
<a id="slds-welcome-mat__tile_1" href="javascript:void(0);" class="slds-box slds-box_link
  slds-box_x-small slds-media slds-welcome-mat__tile">
```

4. To hide tiles based on parameters, add a script. For example, hide tiles 1 and 2 for admins; hide tiles 1, 2, and 3 for the marketing user profile, and hide tiles 4 and 5 for the sales user profile.

```
<script type="text/javascript">
 // <![CDATA[
      function getUrlParameter(name) {
        name = name.replace(/[\[]/, '\\[').replace(/[\]]/, '\\]');
        var regex = new RegExp('[\\?&]' + name + '=([^&#]*)');
        var results = regex.exec(location.search);
        return results === null ? '' : decodeURIComponent(results[1].replace(/\+/g, '
'));
    };

      $(document).ready(function(){

  var isAdmin = getUrlParameter("isAdmin");
        var profile = getUrlParameter("profile");

        if(isAdmin != "1") {
            $("#slds-welcome-mat__tile_1").hide();
            $("#slds-welcome-mat__tile_2").hide();
        }

        if (profile == "marketing"){
            $("#slds-welcome-mat__tile_1").hide();
            $("#slds-welcome-mat__tile_2").hide();
            $("#slds-welcome-mat__tile_3").hide();
        }
        if (profile == "sales"){
            $("#slds-welcome-mat__tile_4").hide();
            $("#slds-welcome-mat__tile_5").hide();
        }

    });
    // ]]>
   </script>
```

💡 Tip: Here's a welcome mat that already has the `profile` and `isAdmin` parameters included. You can inspect or view the source code of the page to see how everything comes together. Or, use the URL to test your changes in sandbox before deploying to production:
https://lightning-readiness-check.salesforce.com/faces/customWelcomeMat.xhtml?profile=sales&isAdmin=1

5. From Setup in Lightning Experience, enter `Adoption Assistance` in the Quick Find box. Locate the Lightning Experience Welcome Mat section.

6. Select **Custom** from the dropdown menu.

7. Enter a URL of your new welcome mat. The URL points to your help content. The URL must begin with https://. It must include a domain name, and can include a port. Don't include parameters at the end of the URL. Using the example welcome mat URL, only include `https://lightning-readiness-check.salesforce.com/faces/customWelcomeMat.xhtml` in the URL field, not the `?profile=sales&isAdmin=1` part of the URL.

8. Add the server as a Trusted URL. See Manage Trusted URLs.

Encourage Users to Stay in Lightning Experience

Drive adoption of the new interface by automatically switching users from Salesforce Classic to Lightning Experience on a regular schedule. You can use the Scheduled Switcher tool to switch users upon login on a daily or weekly basis.

What's this?	For users that aren't taking advantage of Lightning Experience, the Scheduled Switcher feature automatically switches them from Salesforce Classic to Lightning Experience. A welcome mat informs them that they've been switched. It also includes resources to help them work smarter and faster in Lightning Experience.
Which users are affected?	A user is switched to Lightning Experience only if the following conditions are met. - Automatic switching is enabled for either a weekly (default) or daily frequency. - The production org has Lightning Experience turned on. - The user has the Lightning Experience user permission, which grants access to Lightning Experience. - The user is using Salesforce Classic.
How often does switching happen?	Admins choose whether the switch occurs daily or weekly. The default is weekly. The approximate reset is 1:00 AM daily and Sunday 1:00 AM for weekly. Times are local time for the data center, which supports your instance. The switch happens the next time the user logs in.
What options do users have?	The user can review the resources listed on the welcome mat to learn more about Lightning Experience. The user can also close the welcome mat. The mat is shown each time that the user is switched. If the switcher is available, users can switch back to Salesforce Classic.
Can automatic switch be disabled?	Salesforce recommends disabling it only for a limited group of users by using a permission set, instead of disabling it for the entire org. You can disable automatic switching for an org from the Optimize phase in the Transition Assistant.
Is automatic switch enabled by default?	Automatic switching is enabled by default on a weekly basis. You can change to daily from the Optimize phase in the Transition Assistant.
Can the welcome mat be disabled?	You can't disable the welcome mat.

To control the Scheduled Switcher:

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

2. Select the Optimize phase.

3. Click **Motivate Users to Work in Lightning Experience** to expand the stage.

4. Turn on **Switch users to Lightning Experience on a regular schedule**.

5. Choose the switching frequency.

6. To disable automatic switching for a specific group of users, create a permission set using the Remain in Salesforce Classic user permission. See Create Permission Sets. Chatter Free users, Chatter external users, and Guest users can't be excluded from automatic switching using this permission. The ability to create a permission set for a small group of specific users isn't available in the Group Edition.

📝 **Note:** Ready to start turning off access to Salesforce Classic? See Make Lightning Experience the Only Experience for Some Users.

Make Lightning Experience the Only Experience for Some Users

Ready for some of your users to go all in on Lightning Experience? Keep them in the new interface by removing 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 designated users.

- From Setup, create a permission set that includes the Hide Option to Switch to Salesforce Classic permission then assign the permission set to the desired users. Or, enable the permission in a custom profile to remove the Switcher from everyone in that profile.
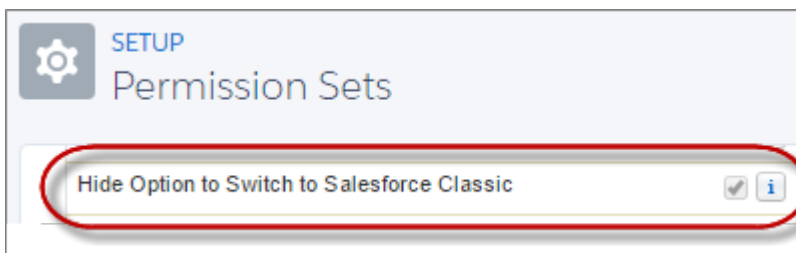
Users see Lightning Experience the next time they log in to Salesforce. They no longer see the **Switch to Salesforce Classic** link.

Even if the Hide Option to Switch to Salesforce Classic permission set is assigned, admins with the Customize Application or Modify All Data user permission can use the Switcher to get to Salesforce Classic.

SEE ALSO:

    Turn Off Salesforce Classic for Your Org

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

    User Permissions

    Permission Sets

    Profiles

EDITIONS

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

Salesforce Product Feedback Form

Selected users see a short survey so Salesforce can gather customer input. Salesforce collects and reviews this data to improve the user experience.
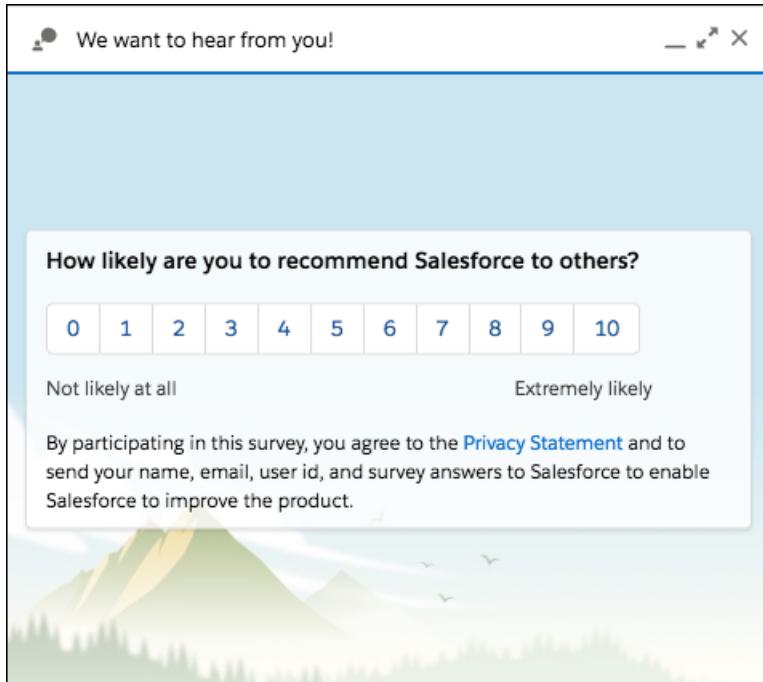
To control the product feedback form:

- From Setup in Lightning Experience, enter *Adoption Assistance* in the Quick Find box, and select it.

Salesforce Product Feedback Form	
What triggers the form to appear?	The form appears shortly after login when the user is on a list, record detail, Report home, or Dashboard home.
How often does the form appear?	One time for selected users. Salesforce can repeat the survey at a future date.
Who sees the form?	A random sample of Lightning Experience users per org.
Which options do users have?	Users can complete the three-step survey, or close the form window.
Is the form enabled by default?	Yes. You can turn off the feature on the setup page.
Can I customize the question asked on the feedback form?	No
Where is the feedback stored?	Internal Salesforce org

Salesforce Product Feedback Form	
Can I display in sandbox?	No

Iterate on Your Lightning Experience Rollout Plan

After rolling out Lightning Experience to a group of users and getting insights from feedback and success metrics, iterate for the next group. Update the rollout plan to reflect lessons learned. Give the next group a better experience by addressing the critical issues that are affecting current Lightning Experience users. And check for new features and innovations to see if there are other use cases to consider for the plan. We also recommend running Salesforce Optimizer to find opportunities for improving your org. Even if you aren't doing a phased rollout, this is a good time to look for ways to clean up and enhance your implementation.

Lightning Experience Roadmap

Explore upcoming product innovations on the Salesforce Architects Product Roadmaps website. This table lists features that were released before Summer '21 for historical purposes only.

Lightning Components Roadmap

Since the launch of Lightning Experience, Salesforce has provided programmatic building blocks that developers can use to rapidly build custom components with the Lightning Experience look-and-feel. With each Salesforce release, we deliver additional base components and enhance existing components to meet the needs and requests of our customers.

SEE ALSO:

Lightning Experience Exclusive Features

Improve Your Implementation with Salesforce Optimizer

Lightning Experience Roadmap

Explore upcoming product innovations on the Salesforce Architects Product Roadmaps website. This table lists features that were released before Summer '21 for historical purposes only.

📝 Note: Check out the Salesforce Architects Product Roadmaps website for current Salesforce roadmaps. 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	Earlier than Summer '21
Operational Reporting	
Dashboards: % shown on gauges	✓
Dashboards: Chart parity with Salesforce Classic when editing charts	✓
Dashboards: Chart parity with Salesforce Classic when viewing charts	✓
Dashboards: Combo charts	✓

Feature	Earlier than Summer '21
Dashboards: Components support source reports with row limit filters	✓
Dashboards: Conditional highlighting	✓
Dashboards: Create and edit dynamic dashboards	✓
Dashboards: Drill to custom URL	✓
Dashboards: Drill to filtered report from chart	✓
Dashboards: Drill to record detail page	✓
Dashboards: Drill to report from filtered dashboard	✓
Dashboards: Edit filtered	✓
Dashboards: Edit running user	✓
Dashboards: Edit table chart types	✓
Dashboards: Filter via URL parameters	
Dashboards: Follow	✓
Dashboards: Relative date filters	✓
Dashboards: Scheduling to yourself	✓
Dashboards: Scheduling to multiple users	✓
Dashboards: Scheduled refresh (without email)	✓
Dashboards: Show dashboard component on Lightning Experience home page	✓
Dashboards Subscriptions: Add roles or public groups as recipients	✓
Reports: Accessible Report Builder	✓
Reports: Auto add fields to custom report types	
Reports: Conditional formatting	✓
Reports: Configurable Stacked Summaries option for matrix reports	✓
Reports: Date column in formulas	✓
Reports: Drill down by groupings	✓
Reports: Dynamic filter via URL	✓
Reports: Field-to-field filters	✓
Reports: Folder management	✓
Reports: Historical trending in tabular format (create, edit)	✓

Feature	Earlier than Summer '21
Reports: Historical trending in tabular format (view)	✓
Reports: Inline editing for reports	
Reports: Joined reports	✓
Reports - Multi-select and drag-and-drop fields in the Lightning Report Builder	
Reports: Notifications	✓
Reports: Partial chart parity with Salesforce Classic	✓
Reports: Printable view (via Formatted Export)	✓
Reports: Relative date filters	✓
Reports: Resizable column widths	✓
Reports: Role hierarchy filter	✓
Reports: Row-level formulas	✓
Reports: Schedule reports as attachments	✓ *(Beta)*
Reports: Search - Global search	✓
Reports: Search - Quick find in Reports home	✓
Reports: Sorting on aggregates	✓
Reports: Subscribe and schedule	✓
Reports: Unique value counts	✓
Reports: Details only export available in .xlsx format	
Report Subscriptions: Add roles or public groups as recipients	✓
Report Subscriptions: Email to multiple users, change running user	✓
Chatter and Files	
Feature	**Earlier**
Chatter: Chatter Messenger	
Chatter: Edit posts	✓
Chatter: Edit comments	✓
Chatter: Multiple file attachments in posts	✓
Chatter: Recommendations	✓
Chatter: Record links	✓

Feature	Earlier than Summer '21
Chatter: Relevance ranked feed search results	✔
Chatter: Rich text in posts and comments	✔
Chatter: Share posts	✔
Chatter: Share via link	✔
Chatter: Topics	✔
Chatter: Topics on records	✔
Content Deliveries: Generate link	✔
Content Deliveries: Via email attachment	✔
Files: Add Files to library	✔
Files: Create libraries	✔
Files: Files Sync client (desktop)	
Files: Folders in libraries	✔
Files: Private related files	✔
Files: Share Connect Files (Google Drive, Box, Microsoft) with records and groups via File Selector	✔
Files: Sort files global search results and Display Date column	✔
Files: Upload multiple files to records and groups	✔
Groups: Broadcast groups	✔
Groups: Recommendations	✔
Groups: Records types	✔
Groups: Search groups	✔
Mobile	
Feature	**Earlier**
Branding and Theming	✔
Chatter Streams	✔
Communities in App Launcher	✔
Context menus (iOS)	✔
Dynamic actions for custom objects	
Dynamic forms	

Feature	Earlier than Summer '21
Einstein Insights	✓ *(Pilot)*
Einstein Voice Assistant	✓ *(Pilot)*
Events	✓
Favorites	✓
Files preview	✓
Global Search	✓
Integrated Email	
Lightning apps	✓
Lightning component (supported on mobile): Accordion	✓
Lightning component (supported on mobile): Activity Timeline	
Lightning component (supported on mobile): Business Card Scanner	
Lightning component (supported on mobile): Chatter	✓
Lightning component (supported on mobile): Dashboard	✓
Lightning component (supported on mobile): Details	✓
Lightning component (supported on mobile): CRM Analytics	✓
Lightning component (supported on mobile): Launchpad	
Lightning component (supported on mobile): List View	✓
Lightning component (supported on mobile): News	✓
Lightning component (supported on mobile): Path (Opportunities)	✓
Lightning component (supported on mobile): Path (other objects)	✓
Lightning component (supported on mobile): Quip Chat	
Lightning component (supported on mobile): Quip Document	✓
Lightning component (supported on mobile): Recent Items	✓
Lightning component (supported on mobile): Related Lists	✓
Lightning component (supported on mobile): Related List - Single	✓
Lightning component (supported on mobile): Related List - Quick Links	✓

Feature	Earlier than Summer '21
Lightning component (supported on mobile): Related Record	✔
Lightning component (supported on mobile): Report	✔
Lightning component (supported on mobile): Report Chart	✔
Lightning component (supported on mobile): Rich Text	✔
Lightning component (supported on mobile): Tabs	✔
Lightning component (supported on mobile): Twitter	✔
Lightning component (supported on mobile): Visualforce	✔
Lightning pages: App pages	✔
Lightning pages: Home pages	
Lightning pages: Record pages	✔
Lightning Web Components	✔
Lists	✔
Native scrolling (enable copy and paste on record pages)	
Navigation: App Launcher	✔
Navigation: Navigation bar	✔
Navigation: Navigation bar, end user personalization	✔
Notes (enhanced and classic)	✔
Open links with one tap	✔
Reports and Dashboards	✔
Reports and Dashboards lists	✔
Reports overview	✔
Share links to app pages	✔
Share links to lists	✔
Share links to records	✔
Tasks	✔
Task and Event reminders (push notifications)	✔ *(Pilot)*
Today	✔
Utility bar	

Feature	Earlier than Summer '21
View all lists in object home	✓
Visualforce pages	✓
Platform	
Feature	**Earlier**
Approval Action: Reassign	✓
Approval Action: Recall	✓
Approval comments	✓
Approval mass actions	✓
Approvals: Items To Approve component	✓
Approvals: Object home	✓
Approvals: Support manual selection	✓
Base Lightning components	✓
Branding and Theming: For entire org	✓
Branding and Theming: Logo and color scheme per app	✓
Branding and Theming: Themes per app	
Console: Accessibility	✓
Console: Action Override—Lightning Component	✓
Console: Choose how records display	✓
Console: Close All Tabs button	
Console: Deep linking—Subtabs	✓
Console: External objects support	✓
Console: History utility	✓
Console: IE11 support	✓
Console: Keyboard shortcuts—Custom	
Console: Keyboard Shortcuts—Standard	✓
Console: Navigation and Utility JavaScript API (Console Integration Toolkit)	✓
Console: Person Account support	✓
Console: Pinned region pages—Components spanning subtabs	✓
Console: Pop out component (multi-monitor)	

Feature	Earlier than Summer '21
Console: Related List Components—Accordion	✓
Console: Related List Components—Stacked and Tab	✓
Console: Remember workspaces on logout	✓
Console: Split view (pinned list)	✓
Console: Visualforce overrides support	✓
Console: Webtabs (3rd-party domain subtabs)	✓
Console: Webtabs and Classic JavaScript API	✓
Console: Workspaces and subtabs	✓
Display Density: User-controlled toggle between cozy and compact views, in console and standard navigation apps	✓
Dynamic actions for custom objects	
Dynamic actions for Account, Case, Contact, Lead, and Opportunity	
Dynamic actions for other standard objects	
Dynamic forms	
Einstein Search: Actionable UI	
Einstein Search: Natural Language Search	
Einstein Search: Personalization	
Favorites	✓
Field help	✓
Field history tracking	✓
Help Menu: Admins can add custom content	✓
Help Menu: Include custom content with apps and managed packages	
Highlights Panel: Inline edit	
In-App Guidance: Create custom prompts	✓
In-App Guidance: Create custom walkthroughs	✓
In-App Guidance: Images and layout options	
In-App Guidance: Modal support	
In-App Guidance: Snooze button	
In-App Guidance: Theming	

Feature	Earlier than Summer '21
In-App Guidance: URL invocation	
Learning Paths	
JavaScript buttons	
Lightning Actions: Act on multiple records in lists and related lists via a Lightning component	
Lightning Actions: Invoke a Lightning component with quick actions	✓
Lightning Actions: Override standard actions with Lightning component in Lightning Experience or Visualforce in Salesforce Classic	✓
Lightning Actions: Standard action override with Lightning component	✓
Lightning Experience on iPad Browser	✓ (GA)
Lightning Extension for Chrome: Component Customization	✓
Lightning Extension for Chrome: Dark Mode	✓
Lightning Extension for Chrome: Link Grabber	✓
Lightning Web Component APIs—Console workspace	
Lightning Web Component APIs—Utility bar	
Lists: Clone a list	✓
Lists: Create and edit mass quick actions for Cases, Leads, and custom objects	✓
Lists: Create and edit mass quick actions for other objects	✓
Lists: Export	
Lists: Filter on Topics	✓
Lists: Filter scopes	✓
Lists: Inline edit	✓
Lists: Mass actions via custom list buttons	✓
Lists: Mass Change Owner for Cases (quick action)	✓
Lists: Mass Change Owner for Cases, Leads, and custom objects (standard action)	✓
Lists: Mass inline edit	✓

Feature	Earlier than Summer '21
Lists: Printable view	✓
Lists: Rolodex on lists	
Lists: Save as	✓
Lists: Search in lists	✓
Lists: Set default list view with Pinned Lists	✓
Lists: Share with groups	✓
Lists: Text wrapping by user	✓
Live Lists (Replaces Classic Console's push notifications for lists)	
Live Records (Replaces Classic Console's push notifications for records)	
Lookups: Dependent filtered lookups	✓
Macros: All objects	✓
Navigation: Automatically switch users from Salesforce Classic to Lightning Experience on a weekly or daily schedule	✓
Navigation: Customize the navigation bar	
Navigation: Enable console navigation and standard navigation in a single app	
Navigation: End user personalization of the navigation bar	✓
Navigation: Prevent users from switching to Salesforce Classic	✓
Navigation: Split view for lists in standard navigation apps (similar to console)	✓
Records: Printable view from browser tab for custom objects and some standard objects (Accounts, Cases, Contacts, Contracts, Leads, Opportunities, Order, Person Accounts)	✓
Recycle Bin	✓
Related Lists: Mass actions via custom list buttons	✓
Related Lists: Mass actions via quick actions	
Related Lists: Mass inline edit	
Related Lists: Resizable columns by user on full Related List page	✓
Related Lists: Resizable columns by user on Related List preview	✓

Feature	Earlier than Summer '21
Related Lists: Show up to 10 columns on preview	✓
Related Lists: User filters on Campaign Members and Campaign Influence	✓
Related Lists: User filters on related lists	✓
Related List Components: Quick Links	✓
Related List Components: Single Related List	✓
Right-to-Left (RTL) language support	✓
Sharing: Manual sharing of records (Accounts, Opportunities, Cases, Contacts, Leads, and custom objects)	
Sharing: Manual sharing of records (Lightning Experience-only enhancements)	
Utility bar	✓
Utility bar: Background utilities (Classic Console's hidden components)	✓
Utility bar: Pop out utilities (multi-monitor)	✓
Utility bar: Right-align and left-align buttons	
Utility bar: Visualforce components support	✓
Sales	
Feature	**Earlier**
Accounts: Account Contact Roles	
Accounts: Hierarchy	✓
Accounts: Account Partners related list	✓
Account Teams: Ability to customize	✓
Account Teams: Add multiple members	✓
Account Teams: Delete all members	✓
Account Teams: View access	
Calendar: Drag-and-drop scheduling	✓
Calendar: Event Invitees (no external calendar required)	✓
Calendar: Event invitees for Exchange 13/16, Google Calendar, and Office 365 (part of Scheduling)	✓
Calendar: Hover to see event details	✓

Feature	Earlier than Summer '21
Calendar: Monthly view	✓
Calendar: Multi-user calendar	✓
Calendar: Public calendar	✓
Calendar: Recurring events—Exchange	✓
Calendar: Recurring Events—GCal	
Calendar: Resource calendar	✓
Calendar: Scheduling (external calendar required)	
Calendar: Share with groups	
Calendar: Share with users	✓
Campaigns: Add leads and contacts from list	✓
Campaigns: Hierarchy	✓
Campaign Members: Mass actions on related list, clone, manage status	✓
Contacts: Hierarchy	✓
Contacts: Pre-populate address, phone, and fax from parent account	✓
Contracts	✓
Divisions: Field available on record home pages	✓
Divisions: List view filters	
Email: Bounce management	✓
Email: List email drafts	✓
Email: Mass email for Campaigns	✓
Email: Mass email for Cases	
Email: Mass email for Contacts, Leads, and Person Accounts	✓
Email: Mass email for Users	
Email: Mass email scheduling	
Email: Open tracking	✓
Email: Quick Action on any object	✓
Email: Schedule email to be sent later (requires Einstein Activity Capture or Inbox)	✓

Feature	Earlier than Summer '21
Email: Send Classic templates in Lightning Experience (text, HTML with letterhead, custom HTML)	✓
Email: Send Classic templates in Lightning Experience for Sales objects (Visualforce)	✓
Email: Support for custom email address fields on Contacts, Leads, and Users	
Email Templates: Custom HTML templates in Lightning Experience	✓
Email Templates: Letterhead	✓
Email Templates: Template folders	✓
Email Templates: Templates object home	✓
Forecasting: Collaborative	✓
Forecasting: Collaborative—Forecast by territory	✓
Forecasting: Collaborative—Product schedule forecast	✓
Leads: Manually run assignment rules on create and edit	✓
Lead Convert: Display matching accounts in Account dropdown menu	✓
Lead Convert: "Do not create Opportunity" checkbox selected by default	✓
Lead Convert: Map custom fields to Account, Contact, Opportunity, and Person Account	✓
Lead Convert: Pre-populate company name in Account and suggested Opportunity name	✓
Lead Convert: Support Contacts to Multiple Accounts	✓
Mail Merge and Extended Mail Merge	
Merge: Accounts and Contacts	✓
Merge: Leads	✓
Merge: Person Accounts	✓
Notes: Private notes	✓
Opportunities: Big Deal Alert	✓
Opportunities: Clone with products	✓
Opportunities: Opportunity partners	✓
Opportunities: Opportunity splits	✓

Feature	Earlier than Summer '21
Opportunities: Owner editability of Forecast Category	✓
Opportunities: Path	✓
Opportunities: Path — Celebrations	✓
Opportunities: Product schedules	✓
Opportunities: Product schedules - Customizable product schedules	✓
Opportunities: Save and add products	✓
Opportunities: Similar opportunities	
Opportunities: Stage history	✓
Opportunity Contact Roles: Ability to customize	✓
Opportunity Contact Roles: Add and edit multiple contacts	✓
Opportunity Products: Add and edit multiple products	✓
Opportunity Teams: Add multiple members	✓
Orders	✓
Path	✓
Path: Celebrations	✓
Person Accounts: Custom quick actions	✓
Person Accounts: Customizable Lightning pages	✓
Person Accounts: Display all related records for a person account in related lists (Assets)	✓
Person Accounts: Display all related records for a person account in related lists (Cases and Notes)	✓
Person Accounts: Email template and merge field support	✓
Person Accounts: Pre-populate Person Account in Send Email action	✓
Person Accounts: Setup in Lightning Experience	✓
Products and Price Books: Archiving	
Quotes	✓
Quotes: Email quote PDF	✓
Sales Console—see the "Platform: Console" section	✓
Tasks: Assign to a queue	✓
Tasks: Bulk create with multiple assignees	✓

Feature	Earlier than Summer '21
Tasks: Custom list views	✓
Tasks: Followup tasks	✓
Tasks: Recurring tasks	✓
Tasks: Reminders	✓
Tasks: Subject combo box	✓
Territory Management: Territory field on Account or Opportunity	
Enterprise Territory Management: Related list on Account; Territory field on Opportunity	✓
Enterprise Territory Management: Run Territory Assignment rules on Account edit	✓
Enterprise Territory Management: Setup in Lightning Experience	✓
Service	
Feature	**Earlier**
Cases: Bulk macros	✓
Cases: Case teams	✓
Cases: Classic Case comments	✓
Cases: Clone	✓
Cases: Close Case, Internal Comment field	✓
Cases: Contact roles	✓
Cases: Enable Unread/Read on compact Case feed	✓
Cases: Experts	
Cases: Feed filters	✓
Cases: Files component	✓
Cases: Fully expand all posts in the Case feed	✓
Cases: Kanban	✓
Cases: Know when Case Comments are private	✓
Cases: Macros	✓
Cases: Manually run assignment rules on create and edit	✓
Cases: Mass quick actions	✓
Cases: Merge cases	✓

Feature	Earlier than Summer '21
Cases: Quick Text	✓
Cases: Related list component	✓
Cases: Related record (lookup) component	✓
Cases: Set public and private visibility on feed items	✓
Cases: Share feed post links	✓
Cases: Show absolute or relative date and time stamp on feed items	✓
Cases: Show Closed Statuses in Case Status field	✓
Cases: Sort feed items from oldest to newest	✓
Cases: Split cases	
Cases: Topics (see Chatter section)	✓
Chat	✓
Email: Auto-save drafts	✓
Email: Copy and paste image	✓
Email: Draft approvals	✓
Email: Drag-and-drop attachments	✓
Email: Platform Shield Encryption	✓
Email: QuickActionDefaultHandler support	✓
Email: Send Classic templates for Cases (Visualforce)	✓
Email: Search	✓
Entitlements related list	✓
Ideas	
Lightning Knowledge: Action—Assign Draft	✓
Lightning Knowledge: Action—Restore past version	✓
Lightning Knowledge: Action—Submit for Approval	✓
Lightning Knowledge: Action—Submit for Translation	✓
Lightning Knowledge: Article version comparison	✓ *(Beta)*
Lightning Knowledge: Authoring actions	✓
Lightning Knowledge: Available in the Salesforce mobile app	✓

Feature	Earlier than Summer '21
Lightning Knowledge: Bots can share Knowledge Articles	✓
Lightning Knowledge: Case to Data category mapping for search filters in Knowledge component	✓
Lightning Knowledge: Communities	✓
Lightning Knowledge: Configure record home Lightning page	✓
Lightning Knowledge: Detach related files	✓
Lightning Knowledge: Favorites redirect to latest version	
Lightning Knowledge: Federated search in Knowledge component	
Lightning Knowledge: Files component	✓
Lightning Knowledge: Global search with Knowledge advanced search	✓
Lightning Knowledge: Hover	✓
Lightning Knowledge: Import with record types and files	✓
Lightning Knowledge: Inline edit	✓
Lightning Knowledge: Knowledge Component Action — Attach to Conversation (Chat & Messaging)	
Lightning Knowledge: Knowledge Component Action — Attach to Social Post	
Lightning Knowledge: Knowledge Component Action — Attach to Voice Call	
Lightning Knowledge: Knowledge Component Action — Attach PDF to Case Email	
Lightning Knowledge: Knowledge Component Action — Insert Article to Case Email	✓
Lightning Knowledge: Knowledge Component Action — Insert Article to Conversation (Chat and Messaging)	✓
Lightning Knowledge: Knowledge Component Action — Insert Article to Social	✓
Lightning Knowledge: Knowledge Component Action — Insert URL to Case Email	✓
Lightning Knowledge: Knowledge Component Action — Insert URL to Conversation (Chat and Messaging)	✓
Lightning Knowledge: Knowledge Component Action — Insert URL to Social	✓

Feature	Earlier than Summer '21
Lightning Knowledge: Knowledge Component available for all objects (search and authoring only)	✓
Lightning Knowledge: Knowledge Component for Chat	✓
Lightning Knowledge: Knowledge Component in Console	✓
Lightning Knowledge: Mass actions (archive)	✓
Lightning Knowledge: Mass actions (delete, submit for translation)	✓
Lightning Knowledge: Mass actions (publish, assign)	✓
Lightning Knowledge: Migration tool to transition Classic Knowledge to Lightning Knowledge	✓
Lightning Knowledge: Multi-language orgs can enable Lightning Knowledge	✓
Lightning Knowledge: Quick Text	✓
Lightning Knowledge: Record types replace article types	✓
Lightning Knowledge: Reporting — Include columns for data categories in "Knowledge" report type	✓
Lightning Knowledge: Reports can be filtered by Data Categories	✓
Lightning Knowledge: Rich Text Editor — Alt text on images for screen reader	
Lightning Knowledge: Rich Text Editor — Anchors	✓
Lightning Knowledge: Rich Text Editor — Paste image	✓
Lightning Knowledge: Rich Text Editor — Resize images in Chrome	✓
Lightning Knowledge: Rich Text Editor — Smart links	✓
Lightning Knowledge: Rich Text Editor — Smart links, Lightning targets	✓
Lightning Knowledge: Rich Text Editor — Video and code block	✓
Lightning Knowledge: Search and view multi-language articles	✓
Lightning Knowledge: See related files in Communities	✓
Lightning Knowledge: Setup in Lightning Experience	✓
Lightning Knowledge: Sharing and criteria-based sharing	✓ *(Beta)*
Lightning Knowledge: Targetable in Quick Actions/Global Actions	✓

Feature	Earlier than Summer '21
Lightning Knowledge: Thumbs up and down ratings component, plus update ratings	✓
Lightning Knowledge: Translation management	✓
Lightning Knowledge: Unified object home with list views	✓
Macros: Conditional steps	✓
Macros: Email template and attachment support	✓
Macros: Merge field support (via Quick Text)	✓
Macros: Quick Text support	✓
Macros: Quick Text — Foldering	✓
Macros: Quick Text — Usage insights and metrics	
Macros: Record details support	
Macros: Relative date fields	✓
Macros: Time field support	✓
Messaging	✓
Milestones console component	✓
OmniChannel: Channel presence and routing	✓
OmniChannel: Supervisor	✓
Omni Supervisor: Agent Chat (monitor)	✓
Omni Supervisor: Agent Chat (whisper, flag raise)	✓
Open CTI	✓
Open CTI: Console API methods	✓
Open CTI: For console	✓
Public Knowledge Base (PKB)	
Quick Text: Accessibility UI option	✓
Service Console—see the "Platform: Console" section	✓
Service Contracts related list	✓
Social Customer Service	✓
Social Customer Service: Attachments, inbound	✓
Social Customer Service: Attachments, outbound	✓
Social Customer Service: Conversations sidebar	✓

Feature	Earlier than Summer '21
Social Customer Service: Emoji component	✔
Social Customer Service: Facebook reviews	✔
Social Customer Service: Mass approvals and recall	✔
Social Customer Service: Quick Text support	✔
Social Customer Service: Social business rules	✔
Social Customer Service: Social publisher on social post record	✔
Social Customer Service: YouTube channel support	✔
Service Setup: Chat setup flow	✔
Service Setup: Communities setup flow	✔
Service Setup: Email to Case setup flow	✔
Service Setup: Facebook setup flow	✔
Service Setup: Help Center setup flow	✔
Service Setup: Lightning Knowledge setup flow	✔
Service Setup: Messaging setup flow	✔
Service Setup: OmniChannel setup flow	✔
Service Setup: Twitter setup flow	✔
Solutions	
SOS	

Features Not on Roadmap

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

Salesforce Classic Feature	Replacement Lightning Experience Feature
Account Contact Roles	Contacts to Multiple Accounts
JavaScript buttons	Lightning Actions
Reports printable view	Formatted Export
Similar Opportunities	None
Solutions	Salesforce Knowledge

Salesforce Classic Feature	Replacement Lightning Experience Feature
Territory Management: Related list on account; territory field on opportunity	Enterprise Territory Management

SEE ALSO:

Compare Lightning Experience and Salesforce Classic

Lightning Components Roadmap

What Features Are Available in Lightning Console Apps?

What are the Gaps Between Lightning Experience and Salesforce Classic

Lightning Components Roadmap

Since the launch of Lightning Experience, Salesforce has provided programmatic building blocks that developers can use to rapidly build custom components with the Lightning Experience look-and-feel. With each Salesforce release, we deliver additional base components and enhance existing components to meet the needs and requests of our customers.

To date, there are over 100 components and variants provided in the Aura components and Lightning web components programming models. View these components at the Component Library.

In addition, we've released the source code for many components on GitHub. These open source components have been modified to allow external developers to use them in the generic "c" namespace.

If you're interested in knowing whether specific functionality, components, or variants are on the roadmap for a future release, post your questions to the Lightning Now Trailblazer Community group.

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

SEE ALSO:

Lightning Experience Roadmap

Turn Off Salesforce Classic for Your Org

When all your users are working in Lightning Experience and everyone has the features and functionality they need, proclaim your Lightning Experience transition a success. Mark the occasion—and stop supporting two interfaces—by turning off your org's access to Salesforce Classic.

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

📝 **Note:** This option isn't available if your org has standard profiles only. Use the Hide Option to Switch to Salesforce Classic permission instead.

Turn off your org's access to Salesforce Classic by removing the Switcher for all users.

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

2. Select the Optimize phase.

3. Click **Turn Off Salesforce Classic for Your Org** to expand the stage.

4. Turn on **Make Lightning Experience your org's only experience**.

Users see Lightning Experience the next time they log in to Salesforce. They no longer see the **Switch to Salesforce Classic** link.

🛑 **Important:** Restoring Salesforce Classic access for specific users after removing the Switcher from your org isn't possible. If you want to turn off Salesforce Classic access for most but not all users, use the Hide Option to Switch to Salesforce Classic permission instead.

SEE ALSO:

Make Lightning Experience the Only Experience for Some Users

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

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 and Lightning Experience, use your profile menu to access your profile page and personal settings. If you have permission to switch between Lightning Experience and Salesforce Classic, the link to do so is located here, too.

Find Objects and Apps in Lightning Experience

It's easier to find your objects and apps in Lightning Experience than in Salesforce Classic. Compare the two interfaces to see for yourself.

Find Your Way Around List Views in Lightning Experience

Lightning Experience improves the Salesforce Classic list view experience with a more intuitive layout, convenient navigation, and integrated 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. In Lightning Experience, the way information is organized on record pages is highly configurable. There are two default record page views: Full view, for an experience that's similar to Salesforce Classic, and Grouped view, where information is balanced out across different tabs and columns.

Find Recently Viewed Items in Lightning Experience

You can access items that you recently viewed quickly in Lightning Experience in more ways than Salesforce Classic.

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 Your Way Around 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 at the bottom of the page. In Lightning Experience, related information appears in condensed related list cards that are easier to access.

Find Your Way Around Chatter in Lightning Experience

With Lightning Experience, you can securely connect with people and groups and share business information, 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, we hope you feel right at home.

Find Your Way Around Setup in Lightning Experience

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

Find Help in Lightning Experience

With Learning Paths, your admin assigns learning content to help you get your work done. See links to these learning items in the Guidance Center from anywhere in the app or in Learning Home. Admins see curated checklists with suggested steps and guidance for setup.

Find Profile and Personal Settings in Lightning Experience

In Salesforce Classic and Lightning Experience, use your profile menu to access your profile page and personal settings. If you have permission to switch between Lightning Experience and Salesforce Classic, the link to do so is located here, too.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
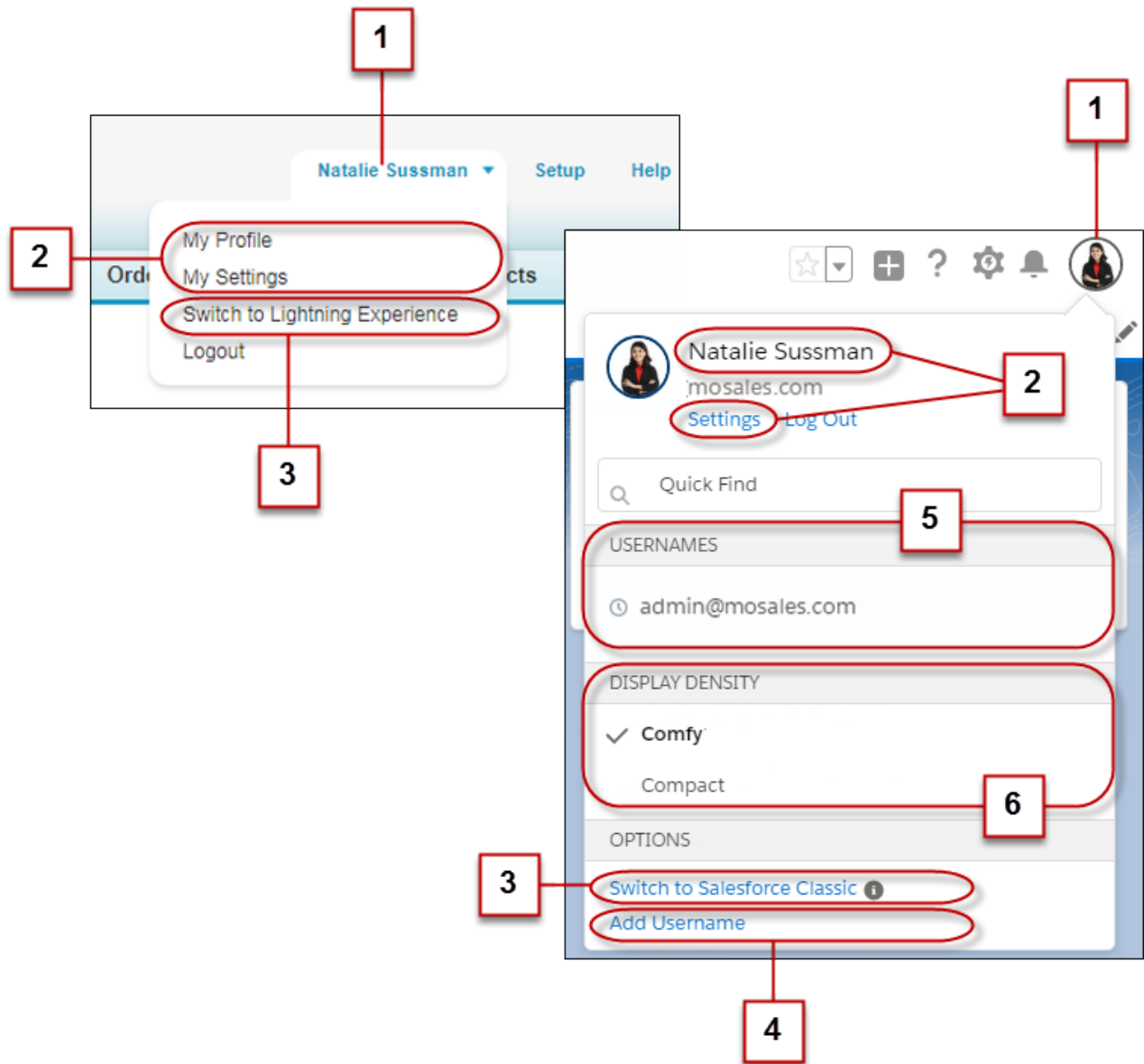
In Salesforce Classic, your profile menu is your name. Same concept in Lightning Experience, although now you're represented by an avatar (1).

Click your name to access your profile page, or click **Settings** to update your personal information (2).

By the way, you look like this by default in Lightning Experience: . That's probably not a great likeness, so upload a photo of yourself from your profile page.

If your company hasn't fully transitioned to Lightning Experience, you may still have access to Salesforce Classic. To head back to Salesforce Classic, use the Switcher (3). When you're ready to return to Lightning Experience, find the Switcher in the Salesforce Classic header or in your profile menu. Each time you switch, we remember your choice and set it as your default environment. If you don't have permission to access Salesforce Classic, the Switcher doesn't appear in your profile menu.

If you have multiple usernames, or have accounts in multiple Salesforce orgs, you can quickly switch between usernames in Lightning Experience. Simply click the **Add Username** link to specify your login credentials (4). Then click entries in the Usernames section to

toggle between usernames without needing to log in again (5). These options don't appear in your profile menu if your admin disabled this feature or if you have only one username.

If you want to change how much information you see on the screen, mix it up with the display density (6). Want a more spacious view? Comfy has labels on the top of fields and more space between page elements. Users who want an info-packed screen might prefer Compact, which has labels to the left of fields and less space between page elements. Changing the density instantly reloads the page, so save any changes beforehand. If you have multiple browser tabs open, you may need to refresh the other tabs to see the new display density setting. Density display doesn't change the page layout and doesn't apply to Digital Experiences or the Salesforce mobile app.

SEE ALSO:

Profiles

Find Objects and Apps in Lightning Experience

It's easier to find your objects and apps in Lightning Experience than in Salesforce Classic. Compare the two interfaces to see for yourself.

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. You can also switch between apps that have custom colors and branding.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
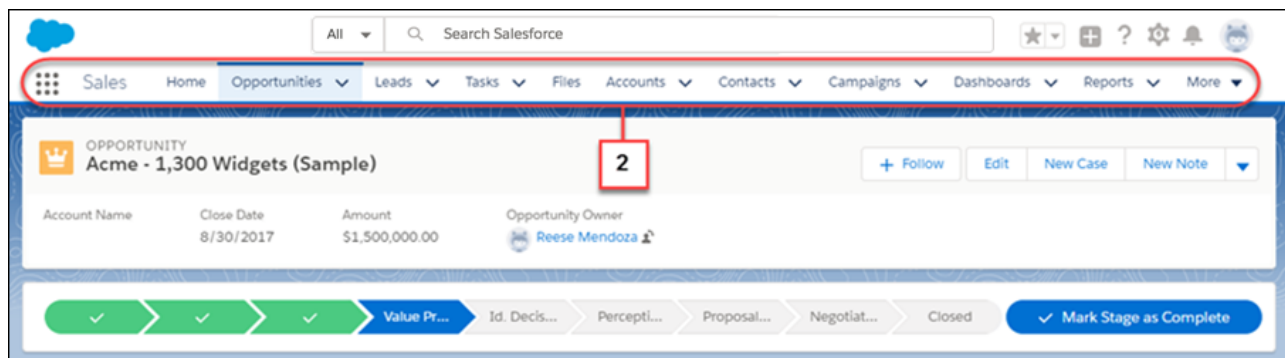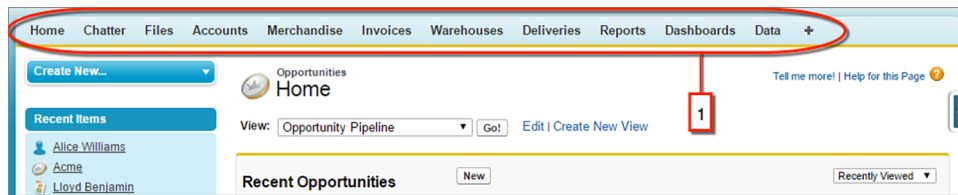
Use the App Launcher to open apps in both Salesforce Classic (3) and Lightning Experience. In Lightning Experience, the App Launcher is always accessible in the navigation bar (4). The quick view of the App Launcher allows easy access to the apps and items search and the ability to open your top apps with a single click. Or click **View All** to open the full App Launcher, which 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 that you want (6).
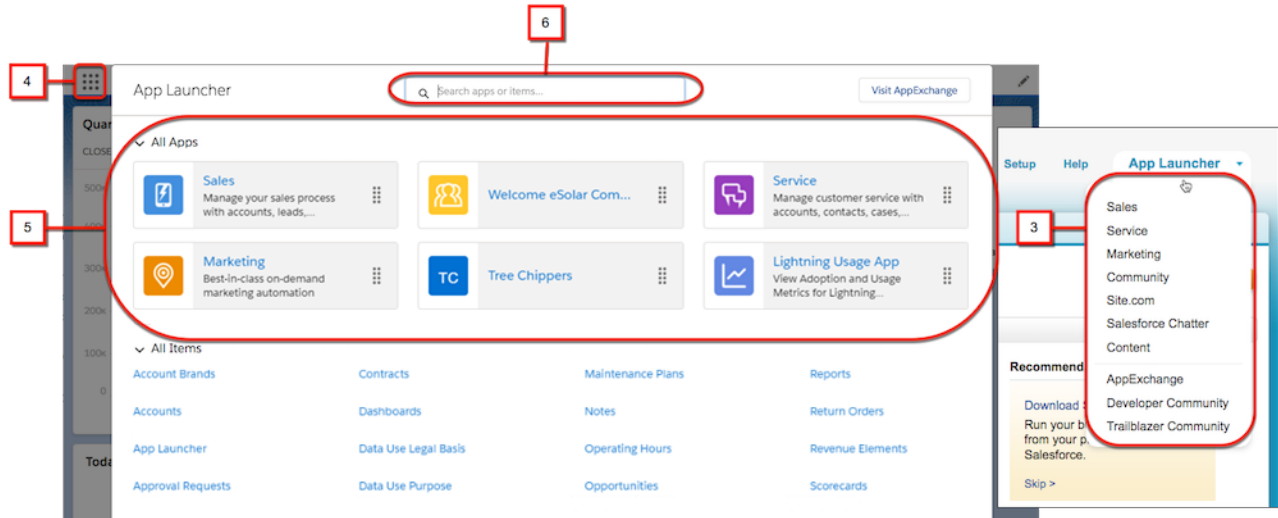
Find Your Way Around List Views in Lightning Experience

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

▶ Work with List Views in Lightning Experience (English Only)

In a list view, you see only the data that you have access to. You can see records that you own, have read or write access to, or are shared with you. List views also include records owned by or shared with users in roles below you in the hierarchy. The fields you see depend on your page layout and field-level security settings.
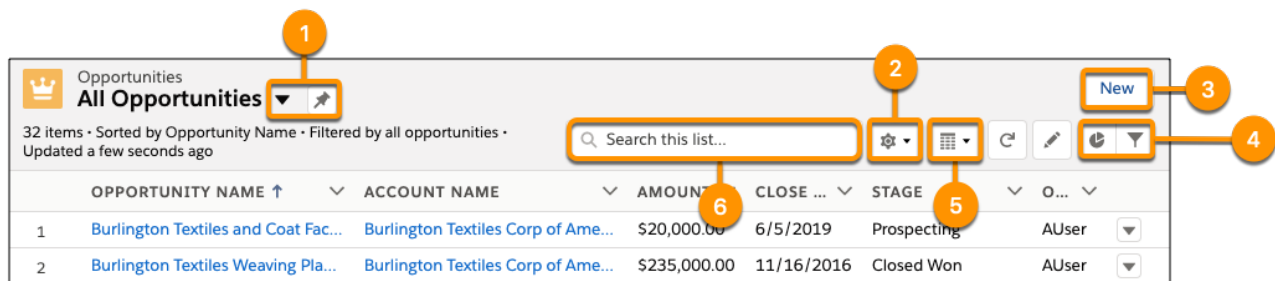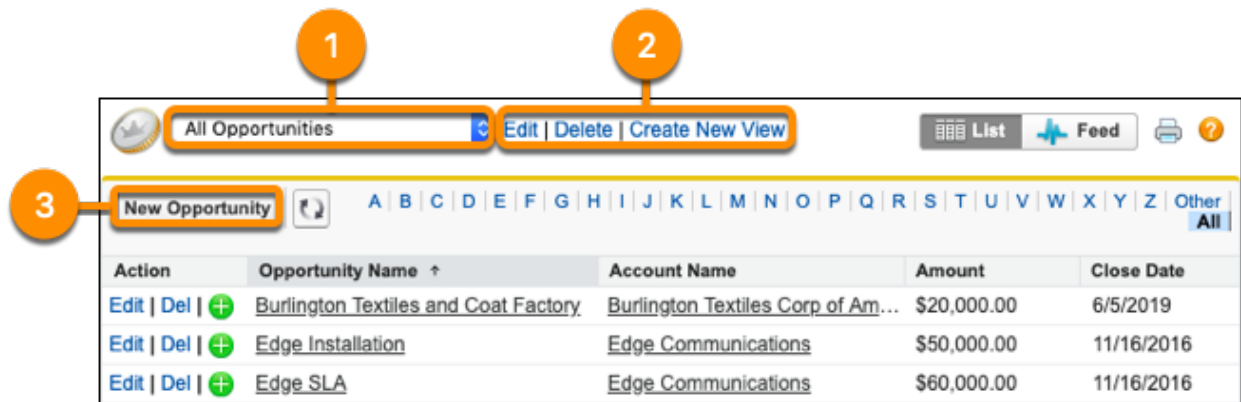
- In Salesforce Classic, select a list view from the dropdown menu. In Lightning Experience, you can also pin a list with 📌 to set it as your default (1).

- Edit, delete, or create a list view using the List View Controls menu ⚙ in Lightning Experience (2).

- Create records directly from a list view (3).

Take advantage of features only available in Lightning Experience.

- Select a list view from the dropdown menu. Pin a list with 📌 to set it as your default (1).

- Edit, delete, or create a list view using the List View Controls menu ⚙ (2).

- Create records directly from a list view (3).

- View a list in different ways. Visualize list view data using charts with 🍃 and refine which records are displayed using filters with ▼ (4).

- Depending on the object, you can switch between the standard table view ▦, the Kanban view ▥, tile view ▦, and split view ▤ (5).

- Search a list view for the data you need (6).

Edit records quickly with new features in Lightning Experience.
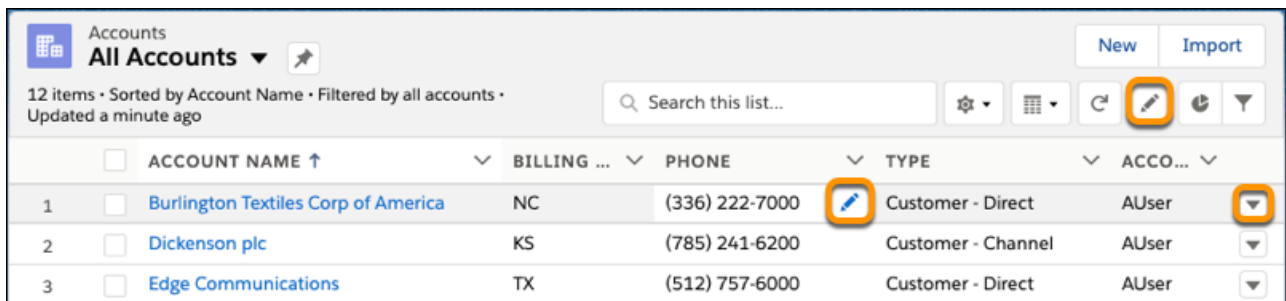
- Edit a field directly from a list view with ✏ in the list view header or next to a record detail.

- Edit or delete a record by selecting the dropdown ß ▼ next to it.

Modify and create list views from your record home page with List View Controls ⚙. To change and reorder the columns displayed in a list view, select **Select Fields to Display**. Fields correspond to columns in the final list view.
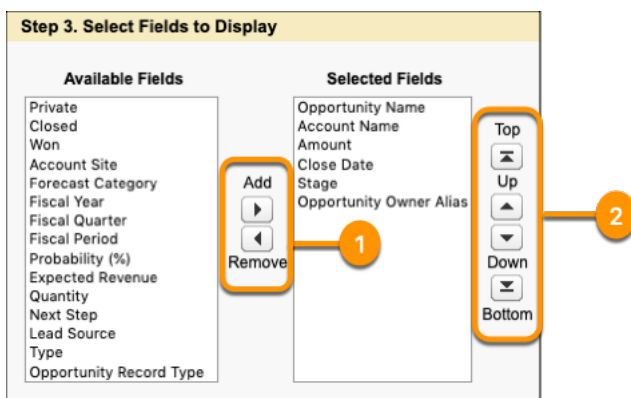
- Add fields to your list view (1).
- Reorder the columns in your list view (2). Columns appear from left to right in the order shown in Visible Fields.

Find Your Way Around Records in Lightning Experience

In Salesforce Classic, record details, related lists, and the record feed display on the same page. In Lightning Experience, the way information is organized on record pages is highly configurable. There are two default record page views: Full view, for an experience that's similar to Salesforce Classic, and Grouped view, where information is balanced out across different tabs and columns.

EDITIONS

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

- In Salesforce Classic, Show Feed (1) controls whether a record's Chatter feed is visible. In Lightning Experience, the record's feed and the feed composer are always available on the Chatter tab (1).

- All of a record's fields and sections are grouped on the Details tab (2).

- In Salesforce Classic and in Lightning Experience when using Full view, related lists are displayed below a record's details (3). For Grouped view in Lightning Experience, related information is displayed in related list cards (3). See Find Your Way Around Related Lists in Lightning Experience for a deeper examination of how related information is handled in the new and classic interfaces.

SEE ALSO:

Lightning Experience Record Page Views

Find Actions and Buttons in Lightning Experience

Find Recently Viewed Items in Lightning Experience

You can access items that you recently viewed quickly in Lightning Experience in more ways than Salesforce Classic.

- In Salesforce Classic, find recently accessed items on the home page in the Recent Items section of the sidebar (1).
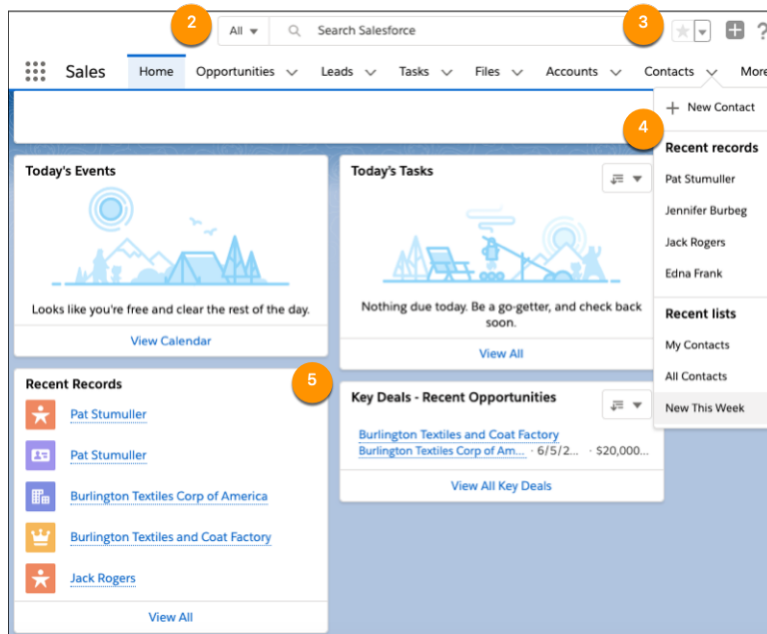
- In Lightning Experience, view your recently searched items by clicking in the search bar (2).
- Add the pages that you frequently use to your favorites. That way, you can click the star icon in your header to access them (3).
- To see your recently accessed records, click the dropdown next to an item on the navigation bar (4).

130

- If your admin has added the Recent Records component, you can find recently accessed records on your home page (5).

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.
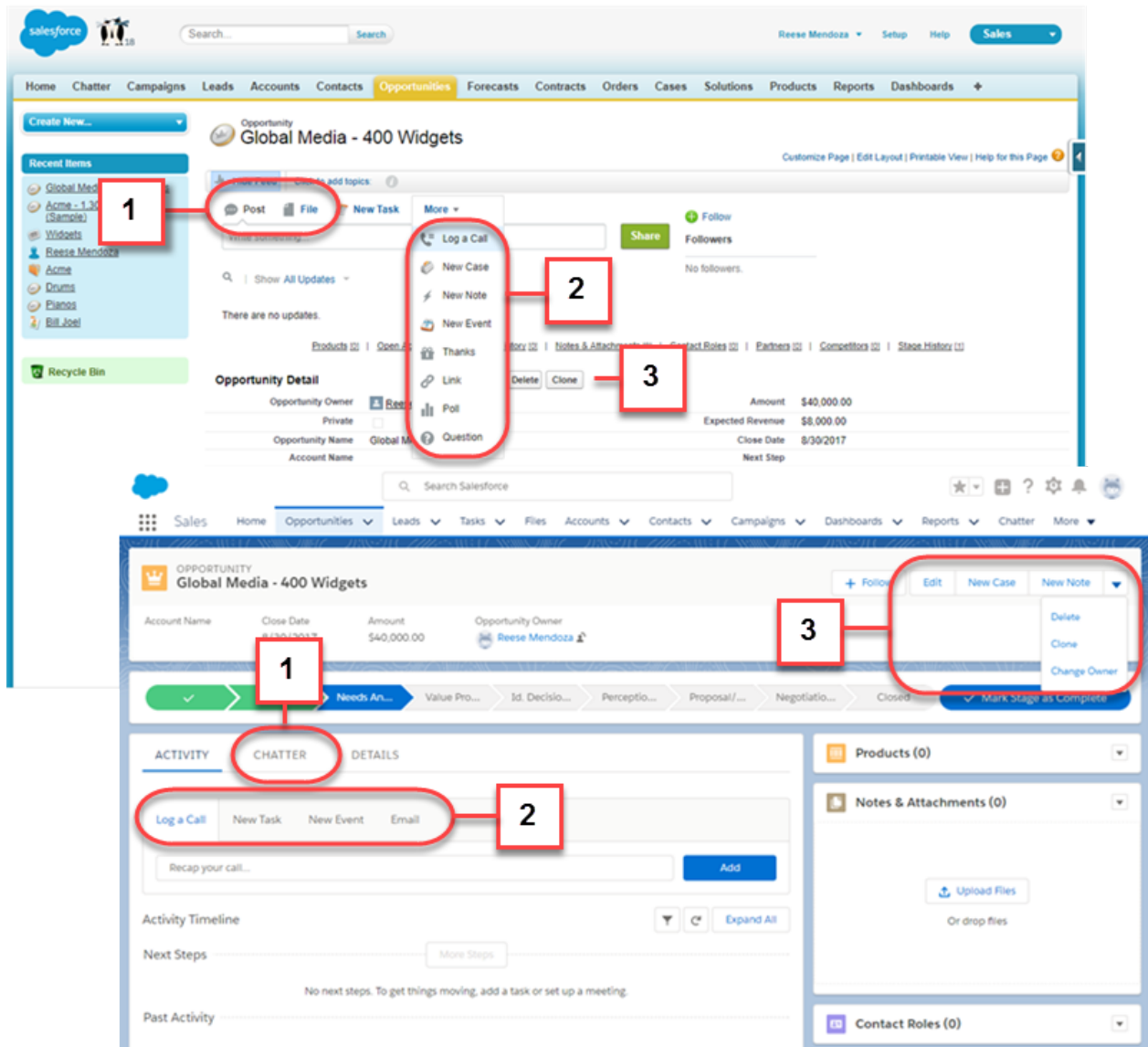
- The Post and Poll standard Chatter actions (1) appear in the composer on the Chatter tab in Lightning Experience. Other standard actions like Thanks and Links, however, aren't available in the new interface.

- 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 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:

How Actions Are Ordered in Lightning Experience

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

Find Your Way Around 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 at the bottom of the page. In Lightning Experience, related information appears in condensed related list cards that are easier to access.

When related information is in the main region on a record, cards display on the Related tab (1). When related lists are in the narrow sidebar region on a record, cards are grouped on the sidebar (2). Where related list cards appear on the page is highly configurable by object and may be different for your org.

EDITIONS

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
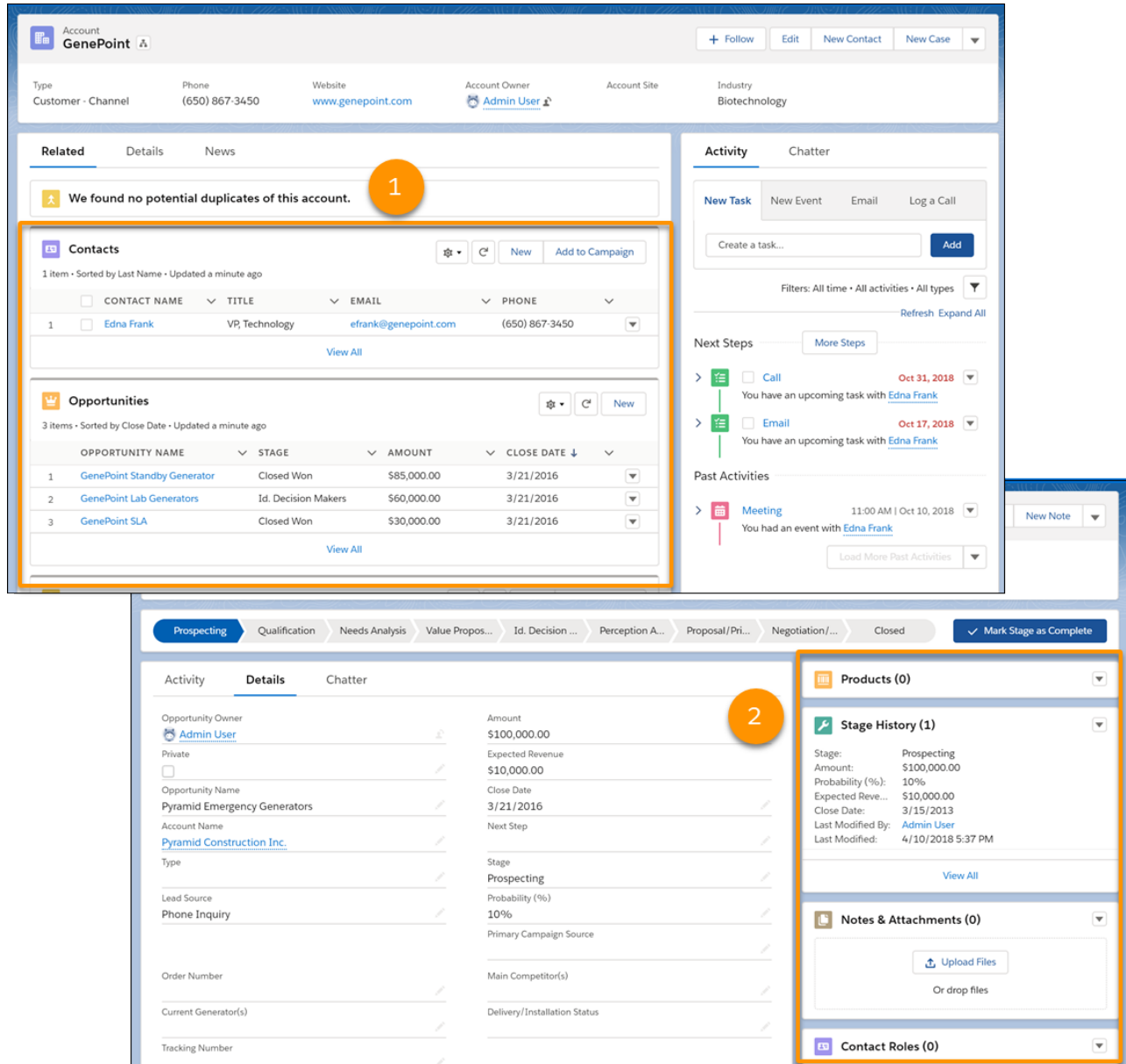
- Related list buttons (1) are in the upper-right corner of each related list card. If there are multiple buttons, use the pull-down menu to access them.

- Each item in a related list card includes a link (2) that opens the related record.

- Record-specific actions (3) are in the pull-down menu next to each related record.

- When related list cards are in a wide region on the page, each card displays up to ten records. In a narrow region, related list cards display up to three records. To see the full list of related records, select **View All** (4).
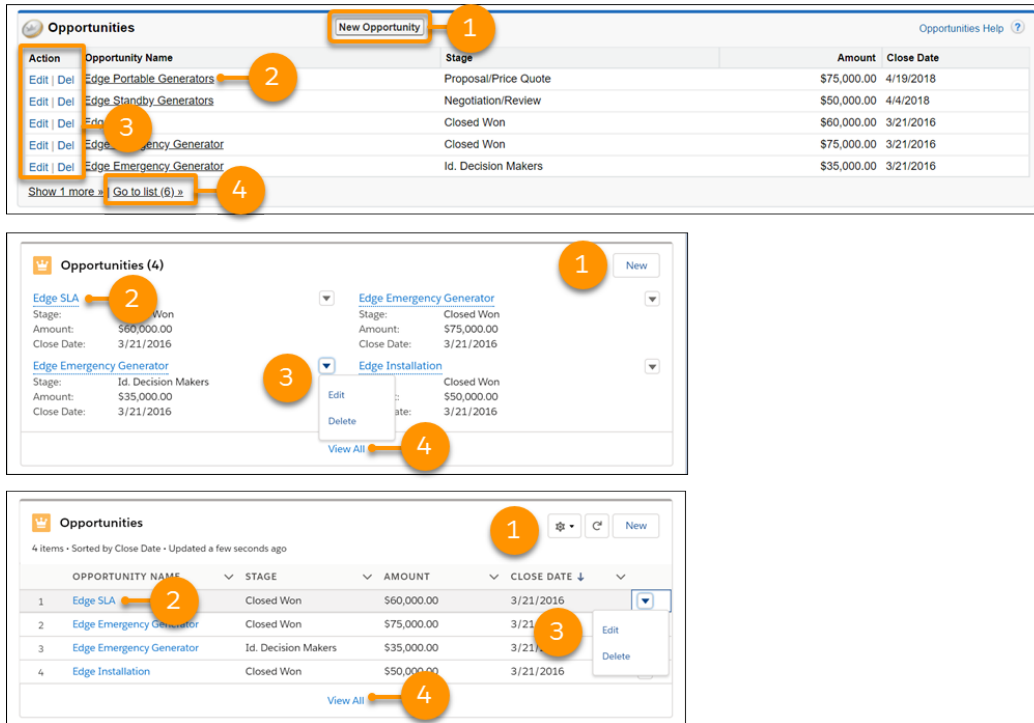
Find Your Way Around Chatter in Lightning Experience

With Lightning Experience, you can securely connect with people and groups and share business information, 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, we hope you feel right at home.

In Salesforce Classic, you typically access Chatter features from the sidebar on the Chatter tab. In Lightning Experience, access Chatter, colleagues' profiles (People), and groups from the App Launcher. You can also get to these places from a tab or the overflow menu, depending on what's showing.
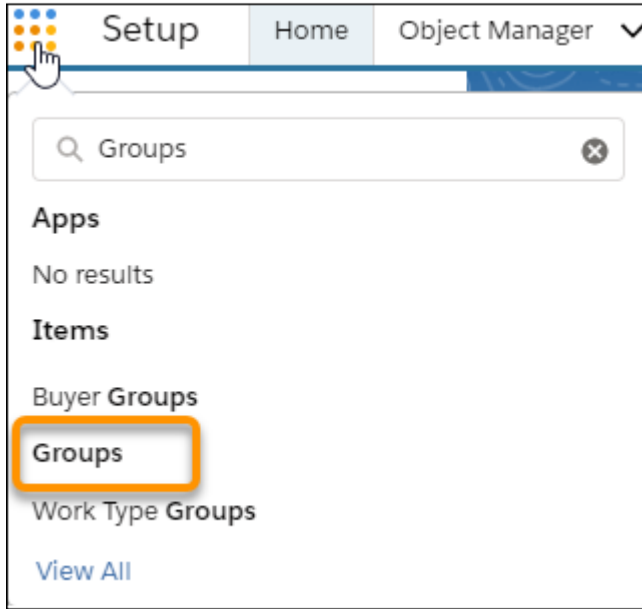
To collaborate on records, look for the Chatter tab on the record. You can post updates, create polls, ask questions, and share files, just like in Salesforce Classic.
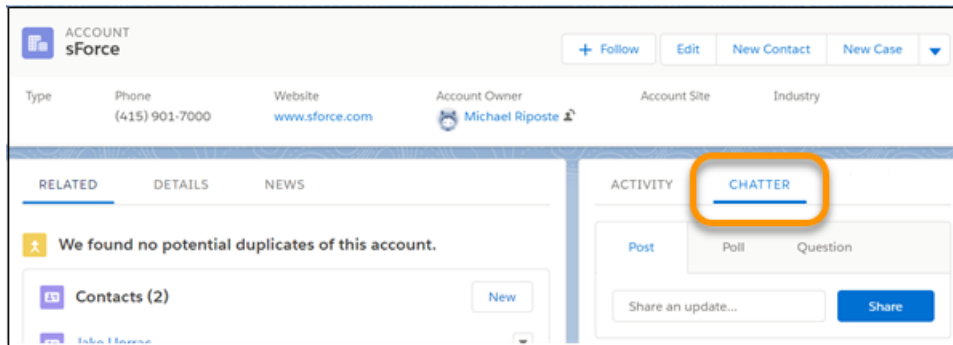
Work with Chatter Feeds

Different feeds on the Chatter tab let you show a select 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. Typically, the What I Follow feed is the default feed. 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. After you follow more than 10, your default feed changes to What I Follow.
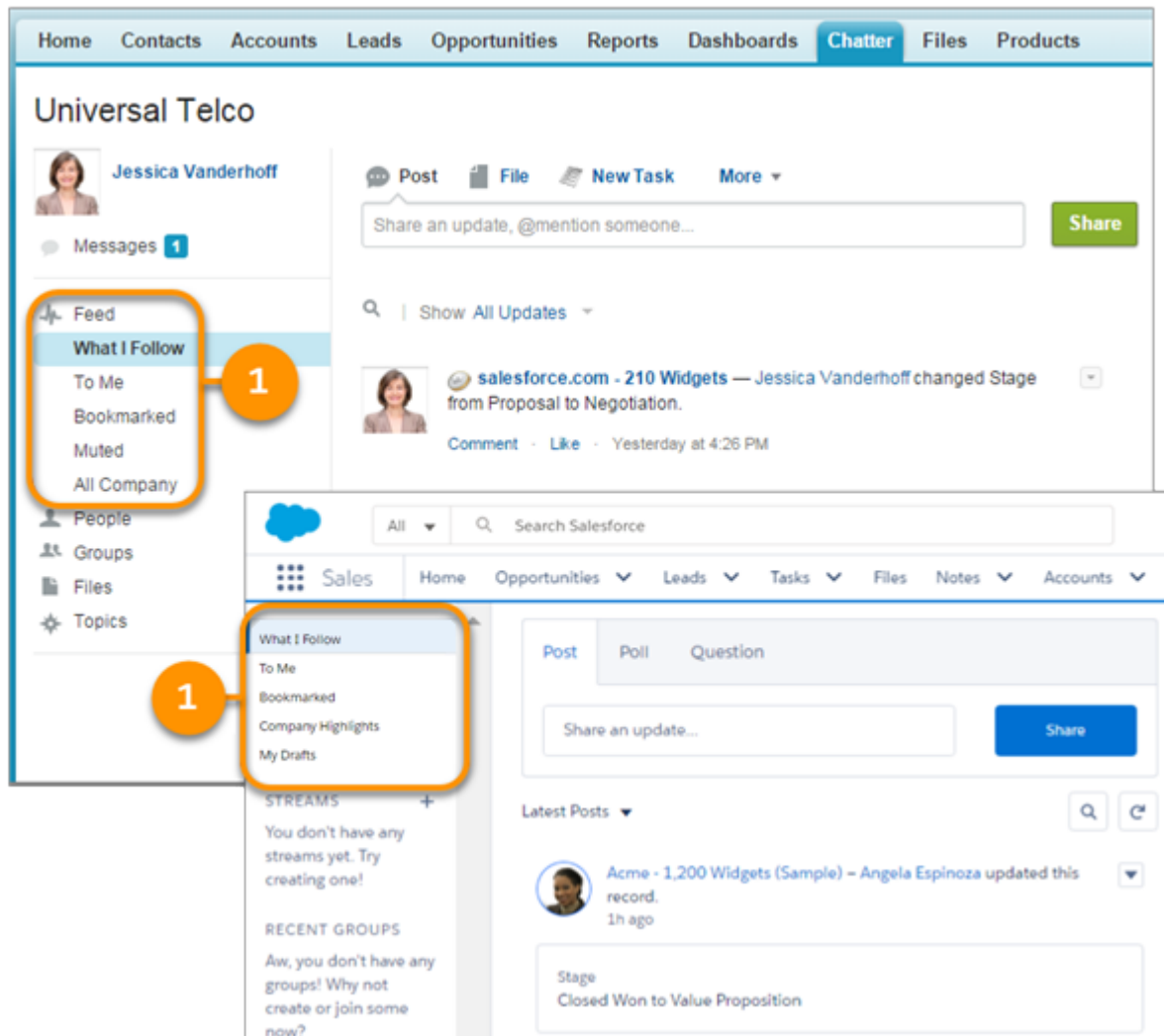
Feed filters let you narrow your feed view even further. The type of feed you're visiting determines the filters that you see on the list.

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. To access buttons for uploading a file, mentioning people, adding a hyperlink, or linking to a record, click the publisher's text box. Other standard Chatter actions that appear in the publisher in Salesforce Classic, like Thanks, aren't available in Lightning Experience.

  Note: In Lightning Experience, you can use a post to convey thanks. The inline image feature lets you include your own branded thank-you image to go along with it.

- You can add an active link in Lightning Experience in the rich text editor. Enter the URL, and your link becomes active when you share the post. You can also add a hyperlink by highlighting text in your post, clicking the Link icon, and adding your URL. Link to a record by entering a forward slash (/), and then the record name. This action opens a selection list of matching records.

  Note: Listed records are returned as the result of a search, and search returns only recently viewed records. So, only the records you interacted with recently appear on the list.

- Sort the feed by most recent posts or comments. Lightning Experience offers a wider variety of filter options than you see in Salesforce Classic. Available options depend on the type of feed that you're in. For example, group feeds give you filtering options for different

views of questions. Question filters let group experts quickly find questions that are still open and group members easily find the questions with a selected best answer.
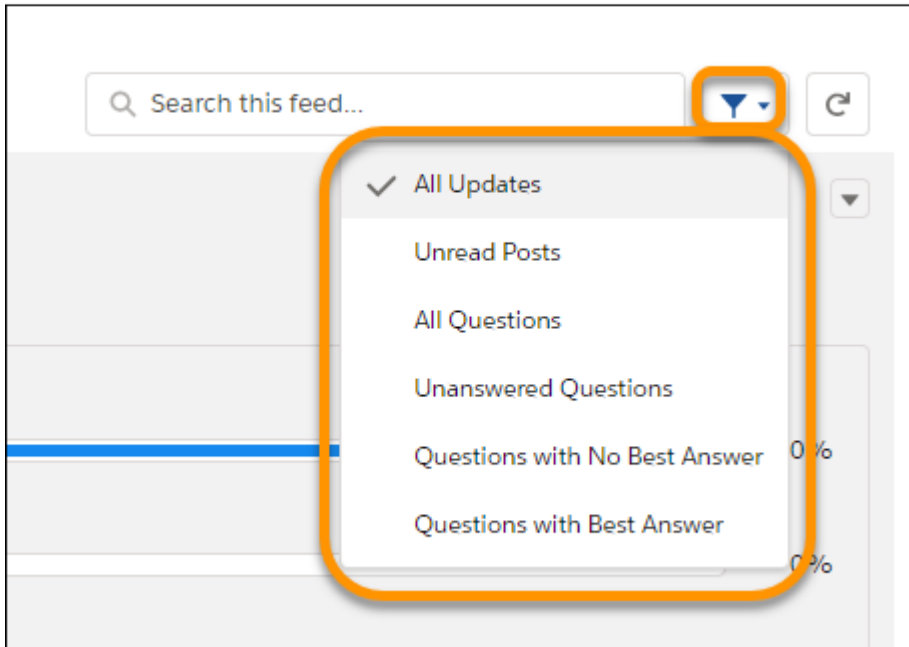
In a profile feed, you can select a filter that shows only the profiled user's posts.

- To see up-to-date information, refresh the feed using the Refresh icon that's next to the Filter icon. This Refresh icon refreshes just the feed, so the entire page doesn't require a reload. Group feeds in Lightning Experience are live and don't usually require a manual refresh. Comments are live everywhere, not just in groups. And, when people are actively commenting, you can see an animation and the names of the people who are commenting.

- 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.

- Add topic tags to posts in both interfaces.

- Lightning Experience saves your draft posts seven seconds after you start entering them. You can see your drafts in the My Drafts feed. Go to My Drafts to review, edit. post, or delete your drafts. Posts are saved as drafts, but questions and polls aren't.

> **Tip:** For accessibility, every feed has a hidden Skip Feed link that you get to by tabbing. Skip Feed skips you past the feed to the End Feed tag. From End Feed, you can tab into the column that typically shows features like Einstein Recommendations and Trending Topics. Whether a Chatter publisher is present, the Skip Feed link follows the tab succession, Sort by, Search, Filter (if present), Refresh this feed, then Skip Feed.

SEE ALSO:

Feed Sort and Filter Options

Find Your Way Around Setup in Lightning Experience

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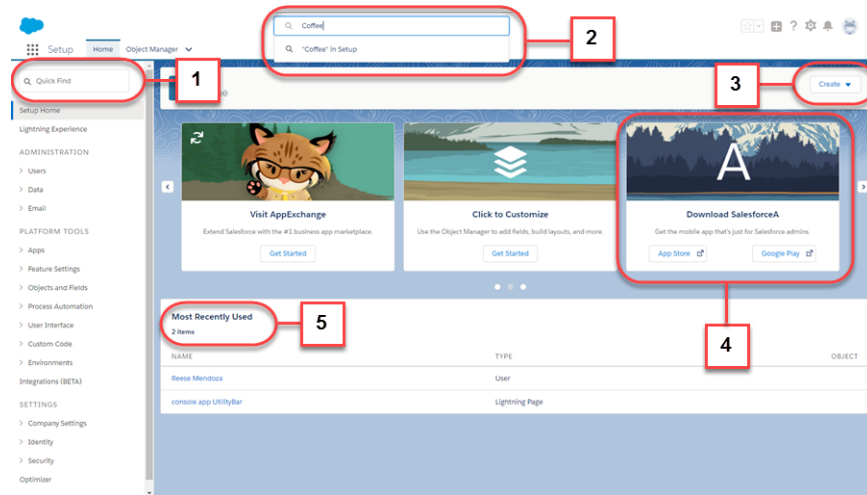
- **Quick Find** (1) is your tool for getting where you want to go quickly. Enter a search term in the Quick Find box to filter the list of pages by what you've entered. Find what you're looking for faster than you would by browsing through the Setup pages.

- To search for fields, objects, users, and more based on the name, use global search (2). While within Setup, enter a 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 the Salesforce mobile app, 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

With Learning Paths, your admin assigns learning content to help you get your work done. See links to these learning items in the Guidance Center from anywhere in the app or in Learning Home. Admins see curated checklists with suggested steps and guidance for setup.

> 📝 **Note:** Some pages in Salesforce Classic include a Help for this Page link. The link still appears on many pages in Lightning Experience. Also, the global header in Lightning Experience includes a question mark icon to open the Help Menu. The menu includes links to learning resources. To view the most applicable and current recommendations from Salesforce and your admin, we encourage you to use Guidance Center.

Get Help Anywhere in the App

To open the panel, click the icon for Guidance Center in the global header.

Content shown in the Guidance Center can change, depending on these factors.

- Where you are in an app.
- Whether you're an end user or an admin.
- Whether your company assigned content to you or turned off Salesforce suggestions for content.

The Guidance Center includes different sections for different types of content. See Explore the Guidance Center.

To see all assigned and suggested learning items in one place, click **Go to Learning Home** in the Guidance Center panel.

See All Assigned Learning Items

The Learning Home page contains these tabs.
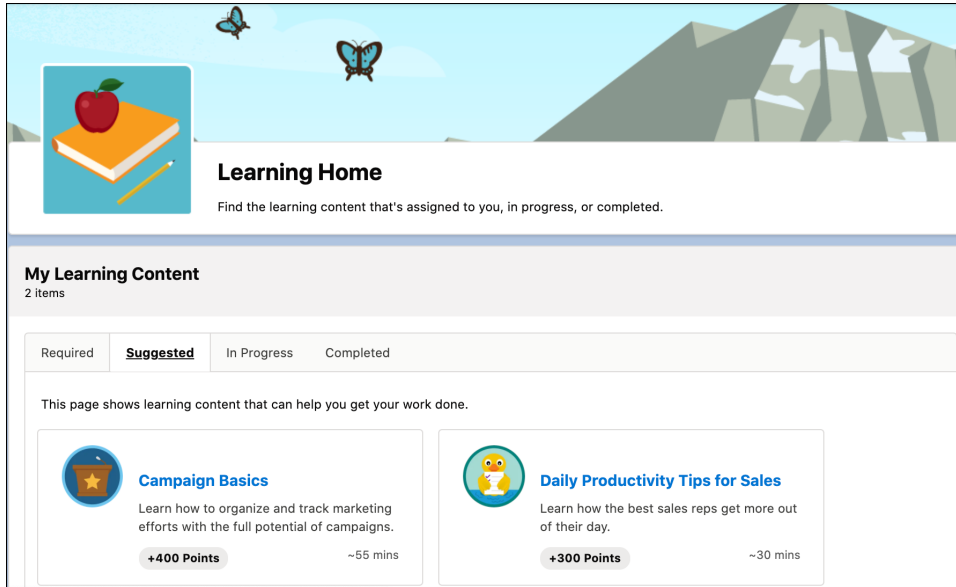
- The Required tab shows learning items that are assigned to you with a due date.
- The Suggested tab shows learning items that are assigned to you but don't have a due date.
- The In Progress tab shows Trailhead or Enablement Sites (myTrailhead) modules that you started and haven't yet finished. This tab doesn't show other types of learning items.
- The Completed tab shows learning items that you completed, including assigned or suggested items that you clicked and Trailhead or Enablement Sites (myTrailhead) modules that you earned badges for.

Admins have access to the Manage Learning Assignments tab, where they can manage the learning items that they assign.
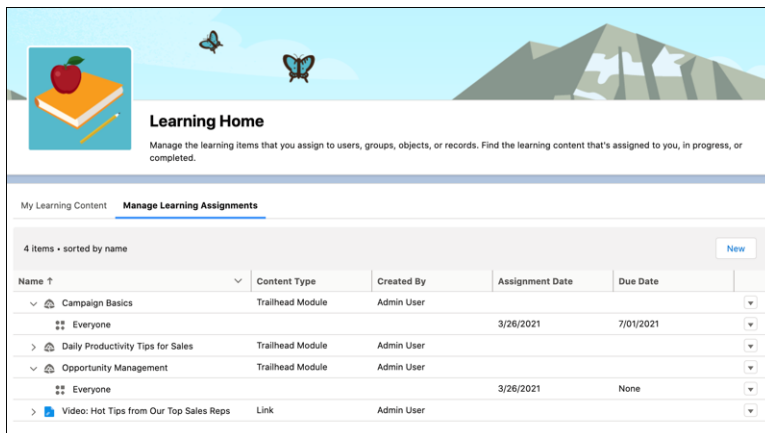
Explore the Guidance Center as an Admin

Admins see a slightly different view of the side panel and Learning Home.
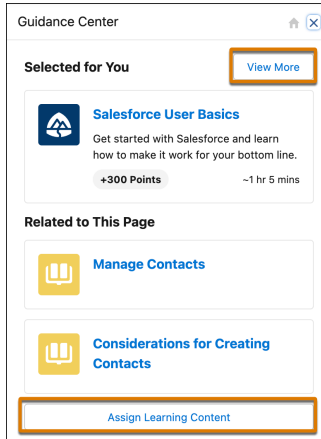
- The link to Learning Home in the Guidance Center is **Assign Learning Content**.
- Even when Salesforce suggestions are turned off for end users, admins still see Salesforce suggestions.

Admins can access guidance sets, which offer personalized setup and learning resources that align with your experience level and business goals. The Guidance Center shows at most two guidance sets at a time, but admins can click **View More** to see all guidance sets available to them. The guidance sets admins see depend on the Salesforce implementation. For example, we only show setup resources to new orgs. Admins receive notifications when new guidance sets are added.
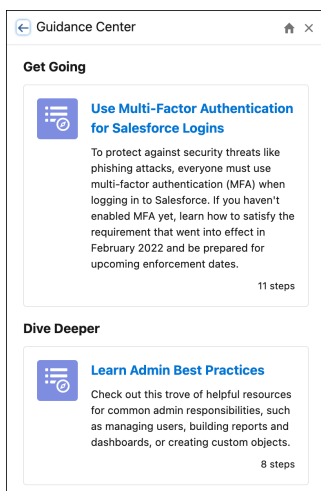
If available, be sure to answer a couple of questions to personalize your guidance. After you submit your answers, review the tailored list of Trailhead modules, videos, prompts, and other resources as you get set up.
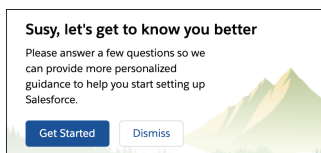
Although we recommend that you click the links in order, feel free to explore. Prompts, videos, and internal links appear inside the app, while all other resources open in a new tab.

As you click through resources and complete steps in a guidance set, some steps require an additional click to mark them as complete. Steps tied to an action, such as creating a record, require you to click the sync progress button ↻ to mark that item as complete. Other steps such as internal links and videos are checked off automatically as you click through them.
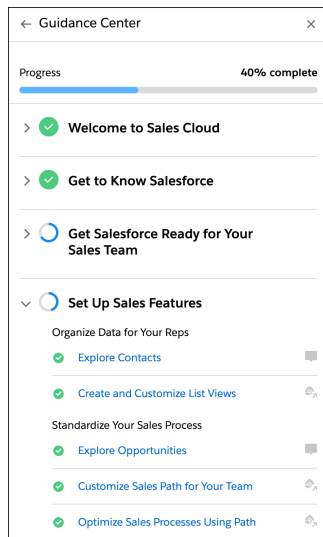
Because guidance sets bring more personalized setup guidance, the Setup Assistant no longer appears in Setup. Essentials and Marketing Setup Assistants still appear. Also, the Lightning Experience welcome mat doesn't appear to admins.

Access Trailhead or Enablement Site (myTrailhead) Content from the Guidance Center

You don't log in to Trailhead or an enablement site (formerly myTrailhead) inside Lightning Experience. If your company doesn't have an enablement site, make sure that all your Salesforce-related accounts are part of your Trailblazer.me profile. That way, the badges that you earn in-app are included in your profile. See Trailblazer.me and Trailhead.

If your company has an enablement site, you don't necessarily have a Trailblazer.me profile, but you can create one. See Create a Trailhead Account, and log in with the username and password that you use to log in to Salesforce. If your company uses Salesforce Identity for Enablement to authenticate users to your enablement site, the Trailhead badges that you earn in-app appear on your Trailblazer.me profile. The enablement site badges that you earn don't appear on your Trailblazer.me profile. See Considerations for Selecting an Authentication Provider

SEE ALSO:

Assign a Learning Item for Learning Paths

Customize Content in the Guidance Center

Lightning Experience Considerations

Lightning Experience re-envisions Salesforce and as a result, there are some classic features that have been implemented differently or don't have a place in the new interface. And there are some classic features that are on the roadmap for an upcoming release. Review these topics to see if any functionality that's critical to your business has changed significantly in Lightning Experience, or is limited or unavailable in this release. This information can help you train users about what to expect when you roll out Lightning Experience.

EDITIONS

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

When you roll out Lightning Experience to users, you have options for allowing access between Lightning Experience and Salesforce Classic. Keep these considerations in mind as you work on your rollout plan.

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. These lists are updated each release. If your users need features that aren't in Lightning Experience, they can switch to Salesforce Classic and keep working.

If your organization doesn't use Chatter, some features 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

Lightning Components Roadmap

Considerations for Switching Between Lightning Experience and Salesforce Classic

When you roll out Lightning Experience to users, you have options for allowing access between Lightning Experience and Salesforce Classic. Keep these considerations in mind as you work on your rollout plan.

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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 are working in Lightning Experience.

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

If you want some 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

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The Lightning Experience User permission and a user's default interface affect the way links resolve for each user in your org. A user's default interface isn't static.

- A user's *initial* default interface is determined by when they were added to Salesforce.

  - All users who existed at the time Lightning Experience was enabled in your org keep Salesforce Classic as their default interface. This is true whether an existing user already had the Lightning Experience User permission or is assigned the user permission at a later date.

- Users who are added to your org after Lightning Experience was enabled get Lightning Experience as their default interface at the time they're assigned the Lightning Experience User permission.

- If you switch a user to Lightning Experience—either from the Switch User tool in the Lightning Experience Transition Assistant or by assigning the Hide Option to Switch to Salesforce Classic permission—their default interface resets to Lightning Experience.

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

- When switching from Classic to Lightning Experience, if the URL contains `nooverride=1` in Classic, it changes to `nooverride=true` in Lightning, and you don't see overrides for the record you're navigating to.

- Running Classic and Lightning Experience in different browser tabs or windows is not supported and can cause unexpected behavior in the look and feel of your org and the values returned by the `$User.UITheme` and `$User.UIThemeDisplayed` fields. For example, if your org is using Lightning Experience, but you switch to Classic in a different browser tab, these fields return a Classic theme in both tabs.

Here are the typical link routing interactions your users can encounter.

User Has the "Lightning Experience User" Permission?	User's Default Interface	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 interface 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.
Yes	Salesforce Classic	Links usually open in Salesforce Classic.
		If a link was generated in Lightning Experience, the link opens in Lightning Experience. The user's default interface doesn't change to Lightning Experience.
No	Salesforce Classic	Links open in Salesforce Classic only.
		If a link was generated in Lightning Experience, 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, give Lightning Experience access to 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 turn off access to Salesforce Classic for everyone.

SEE ALSO:

Set Up User Access to Lightning Experience

Salesforce Classic Doesn't Go Away When You Move Users to Lightning Experience

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

If you want some 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.

- Users working in Salesforce Classic are switched to Lightning Experience.
- Users with any of these profiles or permissions continue to see the Switcher (the Switch to Salesforce Classic link):
  - the standard System Administrator profile
  - Customize Application permission
  - Modify All Data permission
  - Manage Users permission
- If users access features that aren't supported in Lightning Experience, they can 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. When they access a feature that's available in Lightning Experience, they switch back.
- If the Hide Option to Switch to Salesforce Classic permission is later disabled, users are returned to the default interface they were using when the permission was enabled.

SEE ALSO:

Make Lightning Experience the Only Experience for Some Users

Turn Off Salesforce Classic for Your Org

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. These lists are updated each release. If your users need features that aren't in Lightning Experience, they can switch to Salesforce Classic and keep working.

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

Find Lightning Experience availability information for supported objects, fields, list views, and more.

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

Find Lightning Experience availability information about accounts, campaigns, leads and more.

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

Find out what productivity features are available in Lightning Experience.

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

Check what's different or not available in customer service features like Cases, Field Service, and others.

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

Find out about feature differences between Lightning Experience and Salesforce Classic.

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

Find Lightning Experience availability information.

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

Find Lightning Experience availability information for Chatter, people and profiles, groups, and recommendations.

Experience Cloud Sites: What's Different or Not Available in Lightning Experience

Find Lightning Experience availability information.

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

Find Lightning Experience availability information.

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

Find Lightning Experience availability information.

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

Duplicate Management: Differences in Lightning Experience

Find Lightning Experience availability information.

Data.com: Comparison Between Lightning Experience and Salesforce Classic

When a Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from the org. Salesforce removed all contact data from the Data.com service on February 1, 2021, to support customers' needs around compliance and remain a leader in trust and privacy.

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

Process Builder, Flow Builder, and Workflow are fully supported. Approvals is supported but has some limitations for end users.

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

Lightning Experience respects your organization's sharing rules and the Sharing Settings page is available in Setup. High-assurance security sessions are different in Lightning Experience and users with a standard assurance session are blocked from reports and dashboards. Two-factor authentication isn't available for the AccessResource event type in Lightning Experience.

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

Review the differences in customization-related features and settings between Salesforce Classic and Lightning Experience.

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

Find Lightning Experience availability information about Visualforce and S-Controls.

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

Find Lightning Experience availability information for AppExchange and Partner (ISVforce) Apps.

SEE ALSO:

Lightning Experience Console Limitations

Compare Lightning Experience and Salesforce Classic

Lightning Experience Roadmap

Salesforce Classic Doesn't Go Away When You Move Users to Lightning Experience

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

Find Lightning Experience availability information for supported objects, fields, list views, and more.

Supported 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
- Knowledge
- 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

Feature or Setting	Available with Differences	Not Available	Notes
Fields on unsupported objects	✔		Fields for unsupported objects display in Lightning Experience, but they're read-only and don't include links to associated records.

Related Lists

Feature or Setting	Available with Differences	Not Available	Notes
Related lists for unsupported objects		✔	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. Related lists for supported standard objects and your custom objects are available in Lightning Experience.

Object Home

Feature or Setting	Available with Differences	Not Available	Notes
Quick Create tool on the object home page	✔		Create a quick action and place it on an object's page layout.
Access to object-specific reports on the object home page		✔	To get similar functionality, create a custom object home with Visualforce.
Any of the tools in the Tools section on the object home page		✔	To get similar functionality, create a custom object home with Visualforce.
Summary report tool on the object home page		✔	To get similar functionality, create a custom object home with Visualforce.
Force.com quick access menu	✔		Click the gear icon ⚙ in the header and select **Edit Object** for similar functionality.

List Views

Feature or Setting	Available with Differences	Not Available	Notes
Following records directly from a list		✔	
Drag-and-drop scheduling for account, contact, and lead list views		✔	You can create events from contacts, leads, accounts, and person account list views by downloading Schedule from List Views in Lightning Experience from AppExchange. Learn More
Feeds		✔	
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.
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 dropdown 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 dropdown. If you add or remove a column in Lightning Experience, all custom column widths are deleted.
Select more than 50 items at once.	✔		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 files, available actions are Edit, Delete, and Download.
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.
Filters support values only between the minimum and maximum for a signed 32-bit integer, or between -2,147,483,648 and 2,147,483,648. A value	✔		

Feature or Setting	Available with Differences	Not Available	Notes
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. The Classic list view uses the Tabs layout, while the Lightning list view uses the Search layout. To copy the Classic list view, edit the Search layout to match.
Another list view is available for most standard objects via the dropdown list with a name similar to Recently Viewed.	✔		The name of this view includes the name of the object. For example, this list view for accounts is called Recently Viewed Accounts. These two list views, Recently Viewed and Recently Viewed *Objects*, show the same records. The Recently Viewed *Objects* list view isn't deletable, filterable, or editable. Your users can sort the records and chart this list view's data. They can switch to Salesforce Classic to reorder the columns displayed in the list view. The columns appear in the new order when the user switches back to Lightning Experience.
The First Name and Last Name fields don't act as hyperlinks to the relevant record in Lightning Experience.	✔		The Name field still links to the record.
The Owner Alias field doesn't act as a hyperlink in Lightning Experience if the owner alias is a user.	✔		In Lightning Experience, the Owner Alias field is a hyperlink only if the owner alias is a queue.
Alphabet shortcuts for lists		✔	Alphabet shortcuts aren't available in Lightning, but you can use the list view search box to search for records in a list view.
Recently Created and Recently Modified lists		✔	

Work with Data

Feature or Setting	Available with Differences	Not Available	Notes
Access external data: All adapters	✔		Users can access external objects from the Lightning Experience app, but the external objects' associated external data sources must have the High

Feature or Setting	Available with Differences	Not Available	Notes
			Data Volume option deselected. This requirement doesn't apply to the cross-org adapter for Salesforce Connect.
Access external data: OData 2.0 and 4.0 Adapters	✔		Users can access external objects from the Lightning Experience app, with some differences. - If external object records don't appear in your org, make sure that the OData producer doesn't change the values specified in the OData query filters. When your org sends OData queries that specify field values with the $filter equals (eq) operator, the OData producer must return those same field values in the resulting data rows.
			If external object records don't appear in relationship fields or related lists, check for case-sensitive values. For example, suppose that you set up an indirect lookup relationship.
			If the external system uses case-sensitive values in the specified External Column Name, make sure that the parent object field is also case-sensitive. When you define the parent object's custom field, select External ID, Unique, and Treat "ABC" and "abc" as different values (case sensitive).
Salesforce to Salesforce		✔	For existing Salesforce to Salesforce customers, records shared by connections are available in Lightning Experience if their object type is also supported in Lightning Experience. However, the created by and modified by fields aren't displayed.
Recycle Bin	✔		The Recycle Bin in Lightning Experience works the same as it does in Salesforce Classic, except for a few differences. In Lightning Experience: • The org's Recycle Bin is called Org Recycle Bin. The Salesforce Classic name is All Recycle Bin. • Restore records by clicking **Restore** instead of Undelete in Salesforce Classic. • Permanently delete records by selecting them and clicking **Delete** or **Empty Org Recycle Bin** versus Undelete or Empty in Salesforce Classic. • When you view deleted event series (events that repeat in Lightning Experience) from the Recycle Bin, you see an item that represents the series pattern and isn't an event in the series. If you restore the series pattern, the series isn't recreated on your calendar. Try restoring another series event in the Recycle Bin. • If you sync events with Lightning Sync or Einstein Activity Capture products, we recommend that you recreate event series instead of restoring them to avoid unexpected behavior. After you save the new series, it syncs as usual.
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:

Feature or Setting	Available with Differences	Not Available	Notes
			• The Tags link and Recent Tags dropdown list • The Create New dropdown 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 Most sidebar items can be recreated using the utility bar.

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.

SEE ALSO:

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

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

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

Find Lightning Experience availability information about accounts, campaigns, leads and more.

Accounts

Feature or Setting	Available with Differences	Not Available	Notes
Contact roles on accounts		✔	In Lightning Experience, use contacts to multiple accounts instead.
Copy Billing Address to Shipping Address link		✔	In Lightning Experience, manually copy Billing Address and paste it into Shipping Address.
Person accounts	✔		• In some lookup fields, account or contact icons are shown instead of the person account icon. • Suppose that a user creates a case for a person account and adds the person account to the Contact Name field. The Account Name field isn't auto-populated with the person account until the user saves the case. In Salesforce Classic, email open tracking information appears in a related list. In Lightning Experience, email open tracking appears in the activity

Feature or Setting	Available with Differences	Not Available	Notes
			timeline for emails sent using the Lightning Email action. For detailed email open tracking information and information about List Emails, see the HTML Status report on the Reports tab.

Campaigns

Feature or Setting	Available with Differences	Not Available	Notes
Campaign Influence 1.0		✔	Use the newer Campaign Influence instead.

Contracts

Feature or Setting	Available with Differences	Not Available	Notes
Contracts	✔		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

Feature or Setting	Available with Differences	Not Available	Notes
Campaign lookup field		✔	In Lightning Experience, use the Campaign History related list on lead pages.
Converting leads	✔		In Lightning Experience, the user who coverts a lead owns the newly created account, not the lead owner.
Search for Duplicates button	✔		In Lightning Experience, admins can add the Potential Duplicates component to lead page layouts.

Opportunities

Feature or Setting	Available with Differences	Not Available	Notes
Opportunity products	✔		In Lightning Experience: • While adding or editing opportunity products, users can't edit long text fields, custom date/time fields, or custom time fields. • Revenue schedule items and quantity schedule items created from a default schedule that fall on the same date aren't merged. They appear as separate rows in the product schedule, and users can edit them individually. • When users create an opportunity from a related list that's based on a custom lookup field, they aren't prompted to add products.
Similar opportunities		✔	
Contact roles on opportunities	✔		In Lightning Experience, users are limited to adding or editing 200 opportunity contact roles at a time.
Competitor tracking		✔	

Orders

Feature or Setting	Available with Differences	Not Available	Notes
Cloning orders	✔		In Lightning Experience, products aren't cloned when you clone an order. Clone the order, then add products to the new order.
Draft and Activated statuses	✔		In Lightning Experience, 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.
Status picklists	✔		In Lightning Experience, status picklist values aren't filtered based on an order's status. All status values appear in the picklist.
Reduce and reduction orders	✔		In Lightning Experience, the Reduce Orders button isn't available. As a workaround in Lightning Experience, create reduction orders using the Order and OrderItem API standard objects.

Products and Price Books

Feature or Setting	Available with Differences	Not Available	Notes
Archiving products and price books		✔	As an alternative, you can deactivate products and price books. When they're deactivated, all the records related to them are preserved.
Products and price books	✔		• Lightning Experience merges a product's standard and custom price book entries into a single Price Books related list. By contrast, Salesforce Classic has separate related lists for Standard Prices and Price Books.
			You could have previously removed the Price Books related list because you use standard prices only. To show your users standard prices in Lightning Experience, add the list back to the Product page layout.
			• 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.
			• If you overwrote custom Add Products actions, Save and Add Products doesn't redirect users to custom Visualforce pages.

Salesforce Console for Sales

Feature or Setting	Available with Differences	Not Available	Notes
Salesforce Console	✔		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 custom keyboard shortcuts, aren't available in Lightning console apps. Learn more.
			You can't upgrade Salesforce Classic console apps to Lightning Experience from Setup. To get started in Lightning Experience, customize the Salesforce-provided Sales Console app.

Territory Management

Feature or Setting	Available with Differences	Not Available	Notes
Enterprise Territory Management	✔		In the Assigned Territories related list on accounts, you can assign territories only in your active territory model. Use the Manually Assigned Accounts related list on a territory's detail page in Setup instead.

Other Sales Features

Feature or Setting	Available with Differences	Not Available	Notes
Contacts to multiple accounts	✔		Only row-level actions that are specific to the Account Contact Relationship object are available in the Related Accounts and Related Contacts related lists. Actions to view or remove the account-contact relationship are available, but no actions are available to edit or delete the contact or account record.
Divisions		✔	To complete these tasks, switch to Salesforce Classic. • Apply Division filters to List Views and Reports • Create and edit divisions • Change your working division • Transfer multiple records between divisions (Mass Division Transfer)
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 lead record pages.

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

Find out what productivity features are available in Lightning Experience.

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.

Feature or Setting	Available with Differences	Not Available	Notes
Alert banners	✔		You can add the Rich Text component to Home pages in Lightning Experience, and display custom messages to relevant user profiles.

Feature or Setting	Available with Differences	Not Available	Notes
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.

Activities: Events and Tasks

Feature or Setting	Available with Differences	Not Available	Notes
Adding an attachment to an event or task while creating it	✅		In Lightning Experience, you have to create and save an event or task before you can add an attachment to it. In Salesforce Classic, you could add an attachment while creating the event or task.

Activities: Events and Calendars Only

Feature or Setting	Available with Differences	Not Available	Notes
Calendar sharing to groups	✅		You can share your My Events calendar with your manager or other colleagues, but not with personal and public groups.
Drag-and-drop scheduling from list views	✅		You can create events from contacts, leads, accounts, and person account list views by downloading Schedule from List Views in Lightning Experience from AppExchange. Learn More
Dragging to edit events	✅		In Lightning Experience, no admin setup is required to turn on calendar dragging. However, dragging events is different than in Salesforce Classic. See Considerations for Using Events and Calendars in Lightning Experience.
Export events		✅	You can't create an event for another calendar application using the Export Event (formerly Add to Outlook) button. However, if you're set up to sync events using Einstein Activity Capture or Lightning Sync, events you create and edit from Lightning Experience or any of the Salesforce mobile apps sync to Microsoft® calendars or Google Calendar™ automatically.
Follow-up activities from events	✅		You can create follow-up events and tasks from tasks, but you can't from events. Lightning Experience doesn't display the Create Follow-Up Event or Create Follow-Up Task buttons 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.
Invitees and attendees	✅		In Lightning Experience and the Salesforce mobile app, the people you invite to your events are called attendees. In Salesforce Classic, they're

Feature or Setting	Available with Differences	Not Available	Notes
			called invitees. In Lightning Experience and the Salesforce mobile app, users get the Attendees field when admins add it to Event page layouts or quick actions layouts.
Invitations	✔		To send invitations to event attendees in Lightning Experience, there are some requirements. See Considerations for Using Events and Calendars in Lightning Experience.
Recurring events and event series	✔		Events that repeat have different names and behavior depending on where you create them. In Lightning Experience and the Salesforce mobile app, they're called event series. In Salesforce Classic, they're called recurring events. It's best practice to edit repeating events in the user interface where they were created. See Considerations for Using Events and Calendars in Lightning Experience

Activities: Tasks Only

Feature or Setting	Available with Differences	Not Available	Notes
Task assignment notifications	✔		Lightning Experience doesn't display any options to send an email when you assign a task to someone, but it does have a personal setting to receive an email when someone assigns you a task.
Tasks that repeat every weekday		✔	Users can't create recurring tasks with the "every weekday" frequency in Lightning Experience. We don't recommend using Lightning Experience to edit tasks that were created in Salesforce Classic and repeat every weekday. If you do, the edit page doesn't show the latest recurrence details. Instead, create tasks in Lightning Experience that repeat every Monday, Tuesday, Wednesday, Thursday, and Friday.

Notes

Feature or Setting	Available with Differences	Not Available	Notes
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.
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

Feature or Setting	Available with Differences	Not Available	Notes
			with the enhanced version of Notes appear in the Notes related list only. See Add the Notes Related List to Page Layouts in Salesforce Help.

Integrated Email

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 aren't available for use from other objects. For example, templates created for use with the Lead object aren't available for emails sent from opportunity records.

Feature or Setting	Available with Differences	Not Available	Notes
Email templates	✔		Email templates in Lightning Experience support rich text and are sent as HTML.
			A new merge language in Lightning Experience uses a single field for lead and contact data, so you no longer need a specific email template for each. See Use the Handlebars Merge Language in Lightning Email Templates, Enhanced Letterhead, and Email Template Builder in Salesforce Help.
			Any attachment in an email becomes public when that email is sent.
			In Lightning Experience, users need the Modify All Data permission to create and update enhanced letterheads. In Salesforce Classic, there's a separate permission for creating and updating letterheads.
			Text, custom HTML, HTML with Letterhead, and Visualforce email templates created in Salesforce Classic can be used in Lightning Experience. Admins can add, edit, or remove Salesforce Classic email templates from Lightning Experience Setup, in Classic Email Templates.
			Users with community licenses can't create or update email templates. This limit affects both community licenses and portal licenses supported on Experience Cloud sites.
			Community licenses are used to access Experience Cloud sites.
			To use Visualforce email templates for guest users in Experience Cloud sites, see Using Visualforce Email Templates with Guest Users in Salesforce Help.

159

Feature or Setting	Available with Differences	Not Available	Notes
Emailing tracking for individual emails	✔		Email Tracking for individual emails is displayed in the activity timeline. The HTML Email Status report is available in Lightning Experience. This report is the only place to see the total amount of email opens. The HTML Email Status related list isn't available in Lightning Experience.
Automatically populating the To: field	✔		The To: field is automatically populated when you send email from a contact, lead, or person account record. If you create an email from an opportunity where the account is a person account, specify the person account record in the To: field.
Extended Mail Merge		✔	In Lightning Experience, the `Mail Merge` button on Salesforce records that lets users generate Microsoft® Word documents with merged fields from Salesforce isn't available. In addition, hyperlink formula fields aren't supported as merge fields. 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. Or, search AppExchange for comparable functionality.
Mass Email availability for Users and Cases	✔		Mass email, called list email in Lightning Experience, is available for Contacts, Leads, Person Accounts, and Campaigns. It isn't available for Users and Cases.

WDC

Feature or Setting	Available with Differences	Not Available	Notes
WDC sales-management and service-management tools		✔	Lightning Experience users can give thanks badges from a user's profile, a record, or a group in Lightning Experience. Users can also see skills endorsements that they've received in the feed.

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

Check what's different or not available in customer service features like Cases, Field Service, and others.

Cases

Cases are supported, with minor gaps in parity with what's available in Salesforce Classic.

Cases look slightly different than other records. Cases are feed-first and display a Chatter tab first, rather than record details or related information. The case feed helps support agents collaborate and work with cases faster. Details appear next to the feed. You don't see the Activity tab because this information displays directly in the Chatter case feed. In the Service Console app, cases display in a three-column page layout, with the Chatter publisher in the Feed tab.

To fully benefit from the feed-first design on cases, recreate your Salesforce Classic case feed publisher actions in Lightning Experience. One benefit of recreating the publishers actions is that they appear on mobile devices, whereas the Salesforce Classic case feed publishers don't.

Feature or setting	Available with Differences	Not Available	Notes
Case email—draft approvals	✔		Enable email drafts and then use process builder to create an approval process.
Case experts		✔	
Case layout—Close Case layout		✔	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 layout—customize	✔		You can't rearrange the case layout or add custom buttons and links. However, you can still add or remove case feed publisher actions.
Case—New Contact		✔	New associated contacts don't default to the account that they're created on.
Case related lists (see Notes for list)	✔		These related lists aren't available on cases: • Content Deliveries • External Sharing • Related Content • SOS Sessions
Case related list—on Case Comments	✔		The Case Comments related list doesn't save your sorting preferences after you refresh or close the list. For a better experience, we recommend that you add comments to the feed instead of the Case Comments related list.
Case related list—on Case Milestones	✔		In Lightning Experience, the Business Hours field isn't available.
Case related list—on Opportunities	✔		In Lightning Experience, the **New** button is a standard configurable button that's turned on by default. You can't remove the **New** button from the default Cases related list or from any custom cases related lists.

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 custom keyboard shortcuts, aren't available in Lightning console apps. Learn more.

You can't upgrade Salesforce Classic console apps to Lightning Experience from Setup. To get started in Lightning Experience, customize the Salesforce-provided Service Console app.

Entitlement Management

Feature or setting	Available with Differences	Not Available	Notes
Case Milestones related list—on Cases	✔		
Contacts related list—on Entitlements		✔	
Entitlements related list—on Contacts		✔	
Entitlement Templates related list—on Products		✔	
Object Milestones related list—on Work Orders	✔		In the Object Milestones related list on work orders, only the following fields are supported: Created By, Created Date, Last Modified By, Last Modified Date, Deleted, Object Milestone ID, Object Milestone Name, Stopped Time (Mins), Elapsed Time (Mins), Target Date, Completion Date, and Parent Object.
Milestone Status Icon field—on Cases		✔	
Status Icon field—on Service Contracts		✔	

Field Service

Feature or setting	Available with Differences	Not Available	Notes
Skill object		✔	Although skills must be created in Salesforce Classic, resource skills can be assigned and managed in both Salesforce Classic and Lightning Experience.
User field on service resources	✔		The User field on service resources isn't editable in Lightning Experience.

Lightning Knowledge

> **Note:** Knowledge in Lightning Experience works differently than Knowledge in Salesforce Classic, and requires a careful migration plan. Topic ID 'knowledge_lightning_limitaions' not found. After you enable Lightning Knowledge, you can't disable it.
>
> For more information, compare Lightning Knowledge to Classic Knowledge and review the Lightning Knowledge limitations. Then create a migration plan.

Chat

> **Note:** You must route chats with Omni-Channel to chat in Lightning Experience. Make sure that you have Omni-Channel ready for Lightning Experience and have set up your chat button or Embedded Chat window to route with Omni-Channel. Considerations for Omni-Channel routing apply. Learn more.

Chat is available in Lightning Experience as a component in the Service Console app.

Feature or setting	Available with Differences	Not Available	Notes
File transfer—file preview		✔	File previewing isn't used with File Transfer in Lightning Experience. Instead, files are downloaded to the agent's computer.
Console API—methods for Chat	✔		Some Console Integration Toolkit methods for Chat are available in Salesforce Classic only.
List view—Recently Viewed Pages		✔	

Macros

Feature or setting	Available with Differences	Not Available	Notes
Bulk macros	✔		You can also set up mass quick actions on your list view.
Attach a knowledge article in a macro		✔	

Omni-Channel

Omni-Channel is available in Lightning Experience as a utility in the Service Console app.

> **Note:** Objects that aren't supported in Lightning Experience can't be routed using the Omni-Channel utility. For example, SOS isn't supported in Lightning Experience, so you can't route SOS sessions using Omni-Channel.

Feature or setting	Available with Differences	Not Available	Notes
Omni Supervisor—hover in the agent timeline		✔	

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.

Method	Available with Differences	Not Available	Notes
`getDirectoryNumbers()`		✅	
`isInConsole()`		✅	
`screenPop()`	✅		Open CTI for Lightning Experience doesn't support screen pops that open in a new browser tab or window.
`searchAndGetScreenPopUrl()`		✅	To recreate this functionality, use `searchAndScreenPop` in Open CTI for Lightning Experience.

Lightning Experience on iPad Safari

The following Service Cloud features aren't supported on Lightning Experience on iPad Safari.

Unsupported Feature	Notes
Sales Dialer	Sales Dialer isn't supported on Lightning Experience on iPad Safari. We recommend that you use Lightning Experience on a desktop to use Sales Dialer.
Voice	Voice isn't supported on Lightning Experience on iPad Safari. We recommend that you use Lightning Experience on a desktop to use Voice.

Unsupported Service Cloud Features

Unsupported Feature	Equivalent Lightning Experience Feature
Answers	Chatter Questions
Chatter Answers	Chatter Questions
Ideas	Experience Cloud sites
Self-Service portals	Experience Cloud sites
Solutions	Chatter Questions
SOS	None

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

Find out about feature differences between Lightning Experience and Salesforce Classic.

Reports

📝 **Note:** The report builder in Lightning Experience supports all standard Salesforce objects.

Feature or Setting	Available with Differences	Not Available	Notes
Accessibility Mode for the Report Builder		✔	
Follow Reports		✔	Instead of following reports, users can favorite reports in Lightning Experience.
Schedule Report Refreshes		✔	Instead of scheduling report refreshes, users can subscribe to reports in Lightning Experience.
Export Reports	✔		Formatted reports exported from Lightning Experience include a disclaimer that reads "Confidential Information - Do not Distribute" in the report footer. Formatted report exports exclude the disclaimer if you select the **Exclude Disclaimer from Formatted Report Exports** in Lightning Experience setting in Setup.
Subscribe to Reports	✔		In Lightning Experience, users can subscribe to reports, but only receive report results via email.
Report Types		✔	The report type Opportunities with Contact Roles and Products isn't supported in Lightning Experience. In Lightning Experience, select a different report type.
Error Messages for Reports with Invalid Metadata		✔	If a report has invalid metadata, for example if it includes a deleted custom field, then the Lightning report builder doesn't give an error message, but doesn't let you edit the report. In Salesforce Classic, the report builder gives a descriptive error message saying why you can't edit the 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: **Listview** 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. **Columns** In Salesforce Classic, the Reports tab displays these columns: • Action • Name • Scheduled • Folder • Created By In Lightning Experience, users can choose to display or hide these columns on the Reports tab: • Created By • Created On

Feature or Setting	Available with Differences	Not Available	Notes
			- Description - Last Modified By - Last Modified Date - Report Last Run Date - Subscribed In Lightning Experience, these columns always display: - Report Name - Folder Depending on which user perms they have, users sometimes see fewer columns. **Action Menu** In Salesforce Classic, users can see these actions in the action menu: - Customize - Delete - Export In Lightning Experience, users can see these actions in the action menu: - Run - Edit - Edit (Salesforce Classic) - Subscribe - Export - Delete - Add to Dashboard - Open in Quip - Favorite - Move Depending on which user perms they have, users sometimes see fewer actions.
Language Selector in Report Builder		✔	
Reports Printable View		✔	
Specify Precision for a Measure in a Report		✔	

How to Transition to Lightning Experience
What are the Gaps Between Lightning Experience and
Salesforce Classic

Dashboards

⚠️ **Important:** 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.

Feature or Setting	Available with Differences	Not Available	Notes
Link from a Dashboard Component to an Email Address		✔	
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. In Lightning Experience, instead of scheduling dashboard refreshes, subscribe to dashboards.
Visualforce Components on Dashboards		✔	In Lightning Experience, create a custom tab and use that as a dashboard for your custom lightning components.
Follow Dashboards		✔	In Lightning Experience, users can't follow dashboard components. Users only see dashboard feed activity (like posts) in their Lightning Experience feed.
Change Report Chart Size or Location		✔	

Folders

Feature or Setting	Available with Differences	Not Available	Notes
Standard Folders containing default reports and dashboards that come packaged with Salesforce		✔	To get started on some default reports and dashboards, go to AppExchange and download the Reports & Dashboards Starter App.
Pin Folders		✔	Instead of pinning, add folders as favorites in Lightning Experience.
Legacy Folder Sharing		✔	Use enhanced folder sharing, which improves on the features of legacy folder sharing.

Charts and Dashboard Components

Feature or Setting	Available with Differences	Not Available	Notes
Pie Charts		✔	Pie charts from Salesforce Classic display as donut charts in Lightning Experience.
Donut Charts	✔		In Salesforce Classic, negative values don't display on donut charts. Groupings containing negative values display in the legend, and negative values are reflected in the calculation of all summary values, including the total for donut charts. In Lightning Experience, negative values display on donut charts.
Funnel Charts	✔		In Salesforce Classic, negative values don't display on funnel charts. Groupings containing negative values display in the legend. In Lightning Experience, negative values display on funnel charts.
Tables (Dashboard Component)	✔		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. Four-column legacy table components created in Salesforce Classic are viewable but not editable in Lightning Experience. In Salesforce Classic, currency symbols and ISO codes don't show.
Gauge Charts	✔		Breakpoints in gauge charts only accept whole numbers. For example, `5` is a valid breakpoint, but `5.1` isn't. When viewed in Salesforce Classic, gauge charts in dashboards created in Lightning Experience always display both the value and the percentage. In Salesforce Classic, currency symbols and ISO codes don't show. On reports, gauge charts appear as bar charts.
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.

Feature or Setting	Available with Differences	Not Available	Notes
			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 add more than 4 measures.
Number of Groupings Displayed on Charts	✔		In dashboard components, line and bar charts display up to 1,000 groups. All other charts display up to 200 groups. In reports, charts display all groups.
Groupings in Embedded Report Charts	✔		In Lightning Experience, embedded report charts display the source report table's groupings, not the report chart's. In Salesforce Classic, embedded report charts display the source report chart's grouping, not the report table's groupings.

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

Find Lightning Experience availability information.

Salesforce Files

Feature or Setting	Available with Differences	Not Available	Notes
File privacy on records	✔		In Classic, attachments on records can be marked private. In Lightning Experience, set a file to privately shared to a record to achieve similar functionality.
Libraries	✔		Libraries are available in both Lightning Experience and Salesforce Classic. In Lightning Experience, you can further organize your library content with folders. You can create, rename, and delete library folders, and move library files into folders. In Salesforce Classic, there are some advanced library administration options that aren't available in Lightning Experience: **Views** • Top Content • Popular Tags • Recent Activity • Most Active Contributors **Manage members:** Filter existing members to show only

Feature or Setting	Available with Differences	Not Available	Notes
			• Individual Users
			• Public Groups
			• Standard Users
			• Customer Portal Users
			• Partner Users
			Manage library
			• Define record types for the library from the UI
			• View archived content
			• Subscribe to the library
			• Create content as a link to external content by adding a URL instead of uploading content, or add a link to a Google Doc
			• Move a file to another library
Notes and Attachments roll up on parent object		✔	In Salesforce Classic, files in the Notes & Attachments related list roll up to display on the record of a parent object. (For example, and account could display all files attached to related contacts and opportunities.) In Lightning Experience, you can share your Salesforce Files with multiple records. A file posted on an opportunity can also be shared to the parent account. As long as the file isn't private, then you can view the file from the account. You can create a trigger on ContentDocumentLink to do this sharing automatically.
Subscriptions		✔	Not available within Lightning Experience, including viewing and removing subscriptions.
Receive email notifications when content subscriptions are updated		✔	Not available in Lightning Experience. One workaround is to create a trigger to notify users of changes to the content.
Content tags		✔	Not available in Lightning Experience.
Content Detail page		✔	In Salesforce Classic a Content Detail page is available with some information that is not available in Lightning Experience: • Content Tags • Subscriptions to content, authors, or tags • Content rating • Content archiving • View of usernames who downloaded content
Content tab		✔	In Salesforce Classic a Content tab is available with some information that is not available in Lightning Experience: • Search within the library

Feature or Setting	Available with Differences	Not Available	Notes
			• Search facets • Customizing the list view columns • Mass download of files
Content Deliveries		✔	Not available in Lightning Experience. Public links also let you share content, but don't provide a password protection option. Content Deliveries are exposed in the API, so you could create a custom component to provide this functionality in Lightning Experience.
Files		✔	In Salesforce Classic the Files tab and Files Detail page are available with some functionality that is not available in Lightning Experience: • Filter by All Files • Make Private action to unshare from all locations • Share a file with the company

Documents

Feature or Setting	Available with Differences	Not Available	Notes
Documents		✔	Documents aren't available in Lightning Experience. To use documents in Lightning Experience, export them in your weekly export or using Data Loader. Then upload them into Lightning Experience as Salesforce Files.

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

Find Lightning Experience availability information for Chatter, people and profiles, groups, and recommendations.

Chatter

If you turn off Chatter in Salesforce Classic, global search is also turned off. If you turn off Chatter in Lightning Experience, global search stays on.

Chatter Feeds

Feature or Setting	Available with Differences	Not Available	Notes
Posts with or without a file attachment	✔		You have more options for formatting posts and adding attachments to posts in Lightning Experience. The Chatter publisher offers more controls

Feature or Setting	Available with Differences	Not Available	Notes
			for styling and adding content. Enhancements include inline images, hyperlinks, link to record, and code snippets.
Questions	✔		• When you ask a question that's similar to one that's been asked in Salesforce Classic, auto-complete options are presented. In Lightning Experience, no auto-complete options are presented. • The Chatter publisher in Lightning Experience offers more controls for styling and adding content to question details. Enhancements include inline images, hyperlinks, link to record, and code snippets. • In Experience Cloud sites, you can configure question components like the Ask Button, to show related content that can help a site member find their solution. Related content can include similar questions and Knowledge articles.
Thanks	✔		Although Thanks as a feature isn't available in Lightning Experience, you can thank someone in a post. You can make it more special by decorating the post with an inline image that you choose.
Filter feeds	✔		On any feed, the sort and filter options vary, depending on how your administrator sets up Salesforce and the feed that you're viewing. For a detailed breakdown of the filters and sorting options that are available in each experience, see Feed Sort and Filter Options.
Approvals	✔		In Salesforce Classic, users can see and respond to approvals in their Chatter feeds. In Lightning Experience, users are notified about approvals in their in-app notifications. From a notification, they can navigate to the Approval Request tab, where they can respond to requests.
Topics	✔		• After a topic is added to a post, it's permanently associated with the post in the system. This association remains, even if you remove the topic by editing the post. • There isn't a topic list view on the Chatter home page. • The topic detail page doesn't have a publisher.
Highlighted search results		✔	In Lightning Experience, when a user runs a search on a feed, search terms aren't highlighted in the results.
Chatter messages		✔	
Muting	✔		When you mute in Salesforce Classic, the item disappears from its feed. You can see it in the Muted feed. When you mute in Lightning Experience, the muted item stays in the feed where it was posted, but it disappears from the What I Follow feed. You don't receive any more notifications about the item. If you want to refer to that item again, you can search for it in its source feed. You can also copy and save its detail-view URL.

Feature or Setting	Available with Differences	Not Available	Notes
Tags		✔	
Following	✔		• In Salesforce Classic, you can see the records that you're following on the Overview tab of your profile. This view isn't available in Lightning Experience. • In Lightning Experience, you can't follow or unfollow records in a list view or check record status. • In Lightning Experience, you can't see who else is following a record. • In Salesforce Classic, you can't follow something by adding it to a stream.
Rich Text Editor	✔		In the Spring '20 edition of Lightning Experience on iPad Safari, check your text editors for rich text editor support. For example, check for support in a feeds publisher. If you don't have rich text editor support—you can't add an emoji or a hyperlink—you're using an older, unsupported editor. Contact Salesforce Support to upgrade to the latest editor.

People and Profiles

Feature or Setting	Available with Differences	Not Available	Notes
All User list		✔	
Chatter Influence		✔	
Limiting visibility of Contact and About fields to employees, external users, or public (guest) users		✔	
Add new actions (administrator)		✔	
Edit profile for Chatter External licensees		✔	*Profile* refers to the external user's personal profile page.
Recently Talked About topics	✔		The Trending Topics area on the Chatter tab in Lightning Experience shows the topics that are being discussed right now in Chatter.
Profile photo	✔		Your Experience Cloud site profile photo in Lightning Experience is larger and displays at a higher resolution than in Salesforce Classic. Profile photos uploaded in Salesforce Classic don't look great in Lightning Experience until you upload the photo in Lightning Experience.

Groups

Feature or Setting	Available with Differences	Not Available	Notes
Add Record action in customer groups		✔	In groups that include external members, such as customers, you can't add records using the Add Record action. You can't add records even when an administrator includes the action in the group publisher.
Use Invite People to invite customers to join groups using their email addresses		✔	Instead, you must create users for these customers. Then use the Add Member action to add them to the group.
Access Chatter-wide notification settings from the group notification settings		✔	In Salesforce Classic and Lightning Experience, you can edit your personal Chatter settings through your personal Settings. Click your profile avatar at the top of the page, and click Settings (Lightning Experience) or My Settings (Salesforce Classic).
Recently Talked About topics		✔	
Remove files from the group files list	✔		In Lightning Experience, you can delete group files that you own from the page that you see when you click **View All** on the group's files list.

Recommendations

Feature or Setting	Available with Differences	Not Available	Notes
Recommendations	✔		• In Lightning Experience, Recommendations appear only on the Chatter home page. • Files and records aren't recommended.

SEE ALSO:

Compare Lightning Experience and Salesforce Classic

Experience Cloud Sites: What's Different or Not Available in Lightning Experience

Find Lightning Experience availability information.

Switch to Salesforce Classic for the following functionality when setting up Experience Cloud sites.

Feature or Setting	Available with Differences	Not Available	Notes
Global header		✔	To switch between your org and Experience Cloud sites in

Feature or Setting	Available with Differences	Not Available	Notes
			Lightning Experience orgs, use the App Launcher.
Cloning or creating email templates as a Partner Community or Customer Community Plus user		✔	
Enabling WDC Thanks to use Mission Badges in Experience Builder sites		✔	

📝 **Note:** Most of the Experience Cloud sites functionality that isn't supported in Lightning Experience affects Salesforce admins only. These few feature gaps shouldn't prevent you from rolling out Lightning Experience to your users. Remember that all users, including those with the System Admin profile have the Switcher, so anyone can switch to Salesforce Classic as needed.

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

Find Lightning Experience availability information.

Feature or Setting	Available in Salesforce Classic console apps?	Available in Lightning Experience console apps?	Notes
General functionality and customization			
Split view placement	Yes	Yes	In Salesforce Classic, this feature is called pinned lists, and you configure it with the Choose List Placement setting. In Lightning Experience, split view is enabled by default, and users can open or minimize split view. The Salesforce Classic Pinned to Top setting isn't available in Lightning Experience.
Resizeable split view	Yes	No	In Salesforce Classic, you can adjust the width of a pinned list. In Lightning Experience, you can't adjust the width of split view.
Custom keyboard shortcuts	Yes	Partial	In Lightning Experience, background utility items can be used to customize keyboard shortcuts.
Keyboard shortcut overrides	Yes	No	
Interaction logs	Yes	No	

Feature or Setting	Available in Salesforce Classic console apps?	Available in Lightning Experience console apps?	Notes
Dynamic list updates (push notifications)	Yes	No	
Dynamic record updates (push notifications)	Yes	No	
Forget open tabs	Yes	No	As a workaround, use a background utility item to control your tabs.
Tab limits	Yes	Partial	In Lightning Experience, you can limit tabs using background utility items.
Close all tabs	Yes	Partial	In Salesforce Classic, **Close all primary tabs** is an option when selecting 🔽 on the tab bar. In Lightning Experience, you can close all tabs with the Shift+w keyboard shortcut.
Save user sessions	Yes	Different	In Salesforce Classic, you can disable saving user sessions. In Lightning Experience, console apps always open the tabs you last opened.
Tab preview on hover	Yes	No	
Third-party domain workspace tabs and subtabs (allowed domains)	Yes	Different	Use the openTab or openSubtab JavaScript API methods to open web tabs inside Lightning console apps. Third-party domains must be allowlisted in the Trusted URLs list to be used with openTab and openSubtab in Lightning Experience.
Console API (JavaScript APIs for navigation and utilities)	Yes	Different	Two APIs interact with Salesforce console apps: the Salesforce Console Integration Toolkit (used in Salesforce Classic) and the Lightning Console JavaScript API (used in Lightning Experience). For more information about both APIs, see the Salesforce Console Developer Guide.
Internet Explorer 11 support	Yes	Yes	You can access Lightning console apps in IE11, but expect significant performance issues. We recommend using a different browser. Keep in mind that support for IE11 ends on December 16, 2017, unless you opt in to extend support. If you opt in to Extended Support for IE11, you can continue to use IE11 to access Lightning Experience until December 31, 2020.
Utility functionality			

Feature or Setting	Available in Salesforce Classic console apps?	Available in Lightning Experience console apps?	Notes
Notes utility	No	Yes	In Lightning Experience, use the Notes utility to create, view, and associate notes with records.
Background utility items	No	Yes	Background utility items run without a visible button in the utility bar. They add functionality to a Lightning console app without cluttering the user experience.
Support for multiple lines of text	Yes	No	
Component functionality			
Region presentation—size	Yes	No	In Salesforce Classic, you can adjust the size of a component. In Lightning Experience, the page template for your record page determines the size of the component region. For example, the three column page template provides a main column width of 50%, and the side columns widths are each 25%. You can't collapse or adjust region size. To view the available page templates, create a page in Lightning App Builder.
Pinned region in custom templates	Yes	No	
Multi-monitor—pop-out workspaces	Yes	No	In Salesforce Classic, this feature is called multi-monitor components.
Visualforce overrides	Yes	Partial	The delete action isn't supported.
Lightning component overrides	No	Yes	Action overrides that use Lightning components for View, New, Edit, and Tab are supported in Lightning console apps. When a user performs an action that's overridden with a Lightning component, the content from the custom action appears in a tab or subtab. When the split view is open, tab action overrides load the Lightning component in a split-view container that is 400-pixels wide.
Collapsible regions	Yes	No	
Service Console functionality			
Service-specific Setup flows	No	Yes	In Lightning Experience, the Service Console app comes with Service-specific setup flows to get you up and running quickly. The flows walk you through setting up Email-to-Case, integrating with Twitter and Facebook, creating an Experience Builder site, and enabling Lightning Knowledge, Chat, and Omni-Channel.

Feature or Setting	Available in Salesforce Classic console apps?	Available in Lightning Experience console apps?	Notes
Knowledge component	Yes	Yes	In Salesforce Classic, this feature is called the Knowledge One sidebar component. In Lightning Experience, use Lightning App Builder to add the Knowledge component to the case page. Lightning Knowledge is different from Knowledge in Salesforce Classic. Learn more.
Omni-Channel utility	Yes	Yes	In Salesforce Classic, this feature is called the Omni-Channel footer component.
Chat	Yes	Yes	In Lightning Experience, Chat works a bit differently. Learn more. Chat is available only in the Lightning Service Console app.
Sales Console functionality			
Person accounts	Yes	Different	Lightning console apps support person accounts with some differences. Person accounts don't have the same three-column layout as business accounts. Use the Lightning App Builder to create the desired layout, and then assign it to appropriate console app and the person account record type.Person account records that display in a contact's Related Record components are read-only. https://help.salesforce.com/articleView?id=console_lex_limitations.htm.
Forecasts	No	Yes	In Lightning Experience, add forecasts to your console app from the App Manager in Setup.

SEE ALSO:

Lightning Experience Console Limitations

Lightning Experience Roadmap

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

Find Lightning Experience availability information.

Navigation

Opening links in a new browser tab, using return and enter keys, and tabbing through records is different in Lightning Experience.

Feature or Setting	Available with Differences	Not Available	Notes
Chatter tab	✔		The Chatter tab isn't hidden in Lightning Experience. You can change the visibility of the Chatter tab to Hidden using the Tab settings on the Profile Edit page in both Salesforce Classic and Lightning Experience. In Lightning Experience the Chatter tab is shown regardless of the setting.
Record field navigation		✔	The top-down tab-key order, which allows users viewing a record detail page to move through a column of fields from top to bottom before moving focus to the top of the next column of fields, isn't supported in Lightning Experience. Even if a page layout is configured for a top-down tab-key order, tabbing moves from left-to-right through field columns in Lightning Experience.

Actions and Buttons

Deep clone, mass delete, sharing, and some mass actions aren't supported.

Feature or Setting	Available with Differences	Not Available	Notes
Mass Delete		✔	Use Lightning component actions.
Some mass actions on object home pages and list views, including modifying or deleting multiple items in a list at once		✔	
Custom buttons with a content source of OnClick JavaScript		✔	Use quick actions and Lightning component actions
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		✔	Use quick actions and predefined values.

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

Searchable Objects

Some objects are searchable in Salesforce Classic but not in Lightning Experience. For a list of all searchable objects and fields, see
Searchable Fields by Object in Lightning Experience.

Feature or Setting	Available with Differences	Not Available	Notes
Searches for Contract Line Item, Resource Absence, Return Order Line Item, Service Resource Skill, Service Territory Member, and Work Order Line Item		✔	These objects can be viewed only as related lists on an object.
Searches for Users	✔		In Lightning Experience, search results for Users are listed under the header "People," except in Setup.
Searches for Attachments and Documents		✔	Only Files are available in search results, not Attachments, or Documents. For information about Files, Documents, and Attachments, see Files and Content: What's Different or Not Available in Lightning Experience in Salesforce Help.

Search Layouts

In Lightning Experience, use the **Search Results** search layout to change the fields shown as columns in both global search and lookup search results. The Search Results search layout also determines which fields can be filtered on the search results page.

Feature or Setting	Available with Differences	Not Available	Notes
Customizations to the Lookup Dialogs, Lookup Phone Dialogs, and Search Filter Fields layouts	✔		Customizing Lookup Dialogs and Search Filter Fields is possible in Lightning Experience through Search Results Layouts. Lookup Phone Dialogs customization isn't available in Lightning Experience.
Customizations to Event and Task search layouts		✔	Activities are shown as separate events and tasks on the search results page. The Search Layouts for Events and Tasks can't be customized.
Custom buttons on search results pages		✔	

Filtering and Sorting on the Search Results Page

Feature or Setting	Available with Differences	Not Available	Notes
Filtering on the search results page	✔		You can filter search results for standard objects and custom objects. Filtering isn't available for other objects. To get the best matches, make sure that your search terms are as specific as possible. When you filter by dates, you can select from predefined ranges such as "Last 7 Days" and "Last 30 Days." You can't enter a custom date range.
Sorting search results for Groups		✔	
"Exact phrase" and "limit to items I own" filter options		✔	

Other Differences for Search Results

Feature or Setting	Available with Differences	Not Available	Notes
Sidebar Search and Advanced Search		✔	To search, use the global search bar in the header in Lightning Experience, and refine results using filters on the search results page for each object.
Search All		✔	There isn't a Search All option in search results. The Top Results page shows the most relevant records for the objects you're most likely to need. Results are grouped by object. To see results for other objects, click object names on the left side of the page, under Search Results. 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.
Pinning objects on the search results page		✔	In Lightning Experience, you can't pin objects, but search results appear that are sorted by relevance. Top Results appear on the left side of the results page. Top Results are prioritized for your most frequently used objects and include objects commonly associated with the search term. For Salesforce Classic, you can pin objects. Pinning objects doesn't affect the order of the objects under the Search Results on the left side of the page.

Lookup Search

Feature or Setting	Available with Differences	Not Available	Notes
User-defined lookup filter fields		✔	Because lookup search results use the same relevance rankings as global searches, users see the most relevant results first.
Admin-Defined Related and Dependent Lookup Filters	✔		In Salesforce Classic, admins set lookup filters as required or optional. In Lightning Experience, all lookup filters are required, even if admins specify them as optional in Setup. In Lightning Experience, users don't see an option to Show all results.
New Button in Lookup Search Window	✔		Not all objects are supported. In Lightning Experience, you can create these objects from lookup 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.

Knowledge Search

Feature or Setting	Available with Differences	Not Available	Notes
Attaching External Documents to Cases in the Knowledge One Widget		✔	Documents from external data sources, including Federated Search, can't be attached to cases from the Knowledge sidebar.
Making Spelling Correction for Knowledge Articles Optional		✔	Spelling correction for Knowledge Articles can't be disabled for Lightning Experience. The **Enable English-Only Spell Correction for Knowledge Search** option on the Salesforce Classic Search Settings page affects only Knowledge searches in Salesforce Classic.

Duplicate Management: Differences in Lightning Experience

Find Lightning Experience availability information.

Feature or Setting	Available with Differences	Not Available	Notes
View, Find, and Merge Duplicates	✔		In Lightning Experience and Salesforce Classic, duplicate alerts are displayed on the record home page for an account, contact, or lead. In Lightning Experience, duplicates are identified using matching rules, which are applied to individual records or duplicate jobs. In Salesforce Classic, duplicates are identified using matching rules or the following: • Leads: The **Find Duplicates** button on lead records • Accounts: The **Merge Accounts** button on the Accounts page • Contacts: The **Merge Contacts** button on the Related Contacts related list on account records In Lightning Experience, merge duplicates that you can't identify using matching rules and duplicate rules by adding duplicate record items to duplicate record sets. Then merge the items.
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 main 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.
Merge Accounts Associated with Relationship Groups		✔	Relationship groups aren't supported in Lightning Experience. Instead, after merging, relate records to accounts manually.

SEE ALSO:

Manage Duplicate Records

Data.com: Comparison Between Lightning Experience and Salesforce Classic

When a Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from the org. Salesforce removed all contact data from the Data.com service on February 1, 2021, to support customers' needs around compliance and remain a leader in trust and privacy.

📝 Note: When your Data.com Prospector or Data.com Clean contract expires, Data.com features, objects, and fields are removed from your org.

To support customers' needs around compliance and to remain a leader in trust and privacy, Salesforce removed all contact data from the Data.com service on February 1, 2021.

For more information, see Data.com Prospector and Clean Retirement.

Data.com Prospector

To create a web tab, see the knowledge article Display the Data.com tab in Lightning Experience.

Feature	Lightning Experience	Salesforce Classic
Search for companies and import them as accounts	Accessed via the Get More Accounts button on the Accounts list view. You can filter on the following fields: • Annual Revenue • Company or Website • Country or Territory • Location Type • State To filter on other fields, use a web tab.	Accessed via the Data.com tab or Search Global Ultimate DUNS button on D&B Company records.
Search for contacts and import them as contacts	Users can search for a contact when it's related to an existing account. On the account detail page, click the Get More Contacts button, and use the search box and filters. To search for other contacts, use a web tab.	Accessed via the Data.com tab or Get Contacts button on accounts.
Search for contacts and import them as leads	Web tab required.	Accessed via the Data.com tab.
Export companies or contacts to a .csv file	Web tab required.	Accessed via the Data.com tab.
See key company insights on accounts	Accessed via the Get More Insights button on accounts.	Accessed via the Prospecting Insights button on accounts.
See key company insights on opportunities	Accessed via the Get More Insights button on opportunities.	Not available.
Prospect for accounts within the same corporate hierarchy	On accounts and opportunities, accessed via the Get More Insights button (Data.com Insights component) or via the Company Hierarchy component.	Accessed via the Company Hierarchy button on accounts.

Data.com Clean

Feature	Lightning Experience	Salesforce Classic
Administrative settings	Not available. Use Salesforce Classic to administer Clean jobs and configure Clean settings.	Administer Clean jobs, and configure Clean settings.
Clean accounts with company data	Bulk cleaning: Clean jobs for accounts. Manual cleaning: Available using the Company Info for Accounts data integration rule (Premium Clean required).	Bulk cleaning: Clean jobs for accounts. Manual cleaning: Clean button on accounts.

Feature	Lightning Experience	Salesforce Classic
Clean contacts with contact data	Bulk cleaning: Clean jobs for contacts. Manual cleaning: Available using Data.com Contact Clean, a free component from Salesforce Labs on AppExchange.	Bulk cleaning: Clean jobs for contacts. Manual cleaning: Clean button on contacts.
Clean leads with contact data	Bulk cleaning: Clean jobs for leads. Manual cleaning: Not available.	Bulk cleaning: Clean jobs for leads. Manual cleaning: Clean button on leads.
Clean leads with company data	Available using the Company Info for Leads data integration rule (Premium Clean required).	Not available.
View and refresh D&B company records	Accessible via a link on an account or lead. A Salesforce Classic tab opens. The tab doesn't interrupt the user's Lightning Experience session.	Accessible via a link on accounts or leads and from the D&B Companies tab.

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

Process Builder, Flow Builder, and Workflow are fully supported. Approvals is supported but has some limitations for end users.

Approvals

Feature or Setting	Available with Differences	Not Available	Notes
Responding to Approval Requests	✔		You can't unlock a record that's locked for approval. To unlock a record, withdraw, approve, or reject the approval request. To show that a record is locked because it's pending approval, create a custom checkbox and set it to `true` for the initial submission action of the approval process. Display the checkbox on the record page.
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.
Approval History Related List	✔		The Approval History related list doesn't include the Submit for Approval button. From the record page, click **Submit for Approval**.

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

Lightning Experience respects your organization's sharing rules and the Sharing Settings page is available in Setup. High-assurance security sessions are different in Lightning Experience and users with a standard assurance session are blocked from reports and dashboards. Two-factor authentication isn't available for the AccessResource event type in Lightning Experience.

Sharing Settings

Lightning Experience respects your organization's sharing rules. The Sharing Settings page is available in Setup in Lightning Experience.

Session Security Levels

High-assurance security sessions are different in Lightning Experience.

Feature or Setting	Available with Differences	Not Available	Notes
High-assurance sessions	✔		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.

Session Privilege Levels

Session privilege levels are maintained in Lightning Experience, with some differences.

Feature or Setting	Available with Differences	Not Available	Notes
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

The AccessResource event type is available in Lightning Experience with some differences.

Feature or Setting	Available with Differences	Not Available	Notes
AccessResource event type	✔		Two-factor authentication isn't available for the AccessResource event type. Use the Block action instead.

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

Review the differences in customization-related features and settings between Salesforce Classic and Lightning Experience.

Setup Pages

In Salesforce Classic, Setup pages use standard object, field, and tab names. In Lightning Experience, Setup pages use renamed object, field, and tab names where available.

Org Customizations

Feature or Setting	Available with Differences	Not Available	Notes
Apex sharing recalculations		✔	
Quick access menu		✔	The shortcuts, MRU list, and global action buttons that are included in the Quick Access menu in Salesforce Classic are available in different areas of Lightning Experience. Lightning Experience navigation item dropdowns contain MRU lists and action buttons. Favorites contains global shortcuts to items that the user has bookmarked.
Custom JavaScript buttons and links		✔	Custom buttons and links that use a JavaScript content source aren't supported in Lightning Experience. Check out these resources for migrating your JavaScript custom button and link functionality to Lightning-friendly options. • Lightning Experience Configuration Converter—A declarative tool that scans your org for simple JavaScript buttons and links, converts them into point-and-click alternatives, and then deploys everything right into your org. • Lightning Alternatives to JavaScript Buttons—Developer-focused Trailhead module with a list of Lightning solutions for your JavaScript button use cases. • A bundle of sample Lightning components in GitHub that you can use as Lightning component actions to replace your JavaScript button functionality.

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.

Feature or Setting	Available with Differences	Not Available	Notes
Record page customizations	✔		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.
Cases	✔		Cases have a special related list dedicated to case close page layouts.
Page layouts		✔	These page layout elements aren't supported in Lightning Experience: • Expanded lookups • Mobile cards • S-controls • Tags
Enhanced page layout editor		✔	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.
Apex sharing rules		✔	
Apex sharing recalculations		✔	
URL field type	✔		When a user clicks a URL field in Salesforce Classic, the URL opens in a separate browser window. In Lightning Experience, internal URLs open in the same window and external URLs open in a separate browser window. In Salesforce console apps, the URL opens in a new workspace tab. In Lightning console apps, internal URLs open in a new workspace tab and external URLs open in a separate browser window.

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**.

Feature or Setting	Available with Differences	Not Available	Notes
Triggers		✔	The following triggers aren't supported: • Case Comment Triggers • Email Message Triggers • FeedComment Triggers • FeedItem Triggers • Group Triggers • Group Member Triggers • Group Record Triggers • Topic Triggers • TopicAssignment Triggers
Layouts		✔	The following layouts aren't supported: • Feed Item Layouts • Group Layouts • Publisher Layouts

In Salesforce Classic, the Object Manager doesn't use renamed object names or field names. In Lightning Experience, the Object Manager uses renamed object names and field names where available.

SEE ALSO:

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

Find Lightning Experience availability information about Visualforce and S-Controls.

Most 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.

Feature or Setting	Available with Differences	Not Available	Notes
Display in the entire page	✔		In Salesforce Classic, Visualforce owns the entire page. In Lightning Experience, it's wrapped in an embedded iframe and hides the `<apex:page>` `showHeader` and `showSidebar` attributes.
`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.
Related list previews	✔		Related list views don't automatically refresh data for Visualforce pages in Lightning Experience. Reload the page to see the new data. Lightning components that use Lightning Data Service to perform DML operations don't have the same limitations regarding related list previews. If you can't update your Lightning component to use Lightning Data Service, you can explicitly trigger a page refresh by firing the `force:refreshView` event after the Apex call completes. We recommend migrating affected Visualforce pages to Lightning components.

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 must 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

Find Lightning Experience availability information for AppExchange and Partner (ISVforce) Apps.

AppExchange

Many solutions on AppExchange support Lightning Experience. To check, look for the *Lightning Ready* certification in the listing highlights. Solutions without the Lightning Ready certification can be used in Lightning Experience, but some features may not be available or work as expected. These solutions may also appear visually inconsistent with Lightning Experience because they use Salesforce Classic styling.

Partner (ISVforce) Apps

Feature or Setting	Available with Differences	Not Available	Notes
Usage Metrics Visualization App		✔	In Lightning Experience, you can use: • License Management App to manage licenses and support subscribers. • Environment Hub to create and manage your development, testing, and trial orgs. • Channel Order App to submit and manage customer orders. • Trialforce to provision a free trial of your offering quickly and easily. • AppExchange App Analytics to view the performance of your Lightning and Visualforce pages.

What to Expect in Lightning Experience If Chatter Is Turned Off

If your organization doesn't use Chatter, some features 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 you use permission sets to turn off Chatter for a subset of users:

• Feeds, topics, groups, and recommendations aren't available.

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

• The Chatter tab isn't available on records.

• Users can't follow records or other users.

• If you turn off Chatter in Salesforce Classic, global search is also turned off. If you turn off Chatter in Lightning Experience, global search stays on.

> 📝 Note: In Lightning Experience, most objects don't show a Chatter tab unless Feed Tracking is enabled for the object. Exceptions are Group, Site, and User objects, which show a Chatter tab regardless of whether Feed Tracking is enabled for them.

EDITIONS

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

Lightning Experience Transition Info Center

As you work on transitioning your org from Salesforce Classic to Lightning Experience, check out these resources. Whether you want to learn about Lightning Experience and how it benefits your business, how to prepare your org and users for the new interface, or how to use the Lightning Platform's UI framework to develop for Lightning Experience, we've got you covered.

Learn About Lightning Experience

Videos

EDITIONS

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

Lightning Experience: Let's Take it for a Spin

Lightning Experience Basics Series

Help

Find Your Way Around Lightning Experience

Trailhead

Learn to Work in Lightning Experience *(trail)*

Salesforce User Tour *(module)*

Sell Lightning Fast with Sales Cloud *(trail)*

Evaluate and Roll Out Lightning Experience

Videos

Journey to Lightning Experience series

Learning Map

Journey to Lightning Experience

Help

How to Transition to Lightning Experience

Meet the Lightning Experience Transition Assistant

Lightning Experience Roadmap

Lightning Experience Considerations

Trailhead

Lightning Experience Features *(module)*

Lightning Experience Rollout *(module)*

Lightning Experience Enablement Pack *(zip file)*

Lightning Experience Basics *(module)*

Develop for Lightning Experience

Trailhead

Develop for Lightning Experience *(trail)*

Lightning Alternatives to JavaScript Buttons *(module)*

Apply Visualforce Skills to Lightning Components *(trail)*

Visualforce & Lightning Experience *(module)*

Build Lightning Web Components *(trail)*

Lightning Design System *(module)*