Evaluate and Roll Out Lightning Experience for Your Org

Salesforce, Spring ’16

@salesforcedocs

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EVALUATE AND ROLL OUT LIGHTNING EXPERIENCE FOR YOUR ORG

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

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

EDITIONS

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

What Makes Lightning Experience So Special?

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

Is Lightning Experience Right for Your Salesforce Org?

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

Transition to Lightning Experience: Let's Do This!

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

Find Your Way Around Lightning Experience

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

Lightning Experience Considerations

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

Lightning Experience Info Center

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

SEE ALSO:

Trailhead: Admin Trail - Migrating to Lightning Experience

Trailhead: Developer Trail - Lightning Experience

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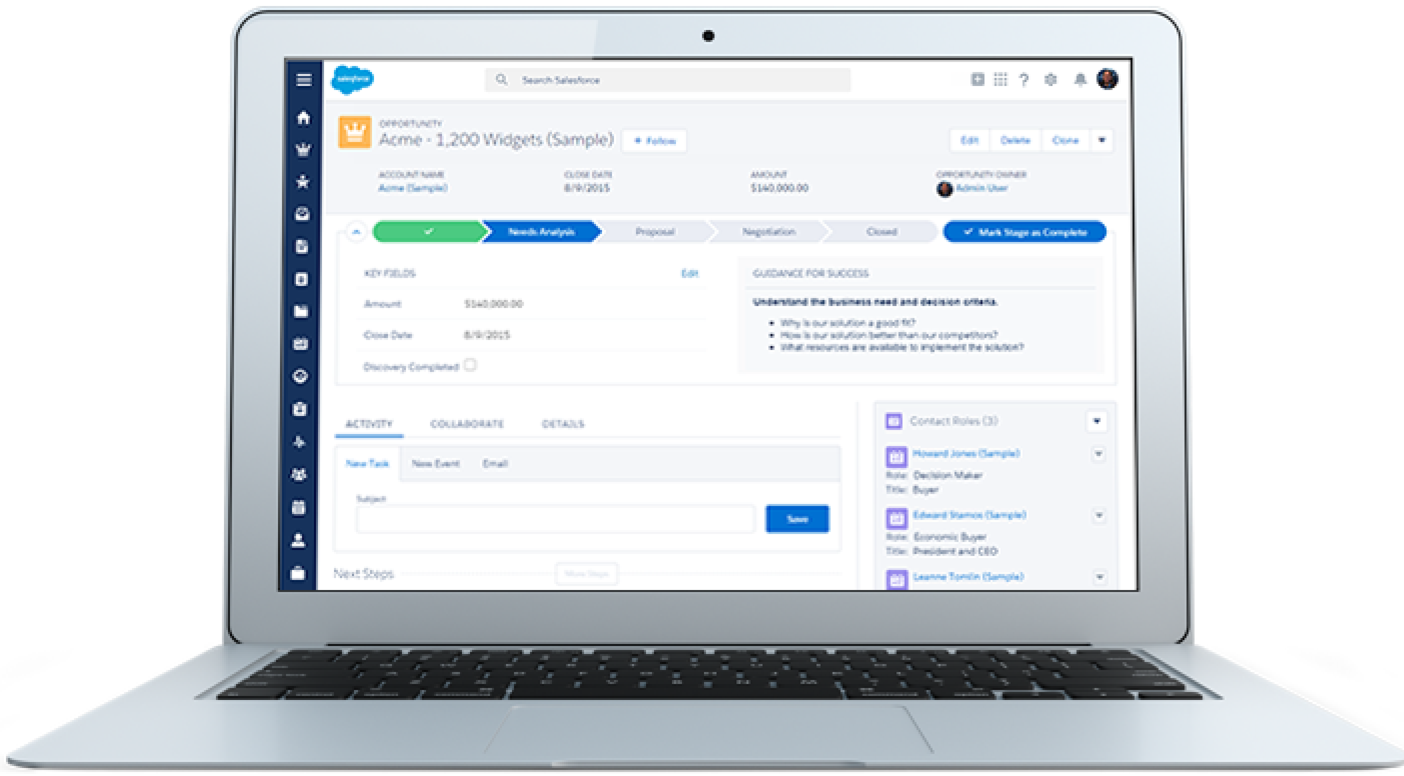

Feature	Why It's Cool
Home	Start the day on the new, intelligent home page. Monitor performance to goal, and get insights on key accounts. And stay on track by seeing exactly what needs doing in the Assistant.
Opportunity Workspace	Drive the right behaviors at every stage of your sales process from this action-optimized workspace. You can customize coaching scripts for each step. And reps can work their deals more efficiently using the handy composer to quickly log calls, create tasks, send emails, and more.
Opportunity Kanban	Visually review the status of deals, organized by each stage in the pipeline. Users can drag deals from one stage to another, and get alerts when an action is needed on a key deal.
Composer Windows	Breeze through those minor but important activities that inevitably crop up during the day without switching context. Get a call from a customer while reviewing a report? It's no problem to quickly log the call—without needing to search for the related deal or switch to a different record. Composer

Feature	Why It's Cool
	windows open on the current page and let users log calls and create events, tasks, and notes that can be related to any record.
Activity Timeline and Task List	See open tasks, planned meetings, and accomplishments in the activity timeline on each opportunity, lead, account, and contact. Or use the task list to see the details of specific tasks alongside the full list of open tasks, tasks due today, and closed tasks. Managers can use the Delegated view to see tasks assigned to people below them in the role hierarchy.
Accounts and Contacts	Find information and gather insights at a glance from the new layout. Get the latest news about customers with integrated Twitter and Account Insights for customers, review upcoming and completed activities, and keep data clean with field-level duplicate matching.
Enhanced Notes	Take better notes with auto-save, rich text capabilities, inline images, versioning, and the ability to relate a note to multiple records.
File Preview Player	Enjoy a richer file preview experience that doesn't require Adobe Flash Player. Vector-based preview images render in higher quality and don't degrade on high-resolution screens, plus they load faster. New controls allow scrolling through multi-page documents, previewing animated GIFs, giving full-screen presentations, and accessing file actions.
Reports and Dashboards	Get more from your data. The new report run page is easier to read and filter. Animated, interactive charts bring your organization's data to life. And a new dashboard editor supports flexible layouts and components that span columns and rows.
List Views	Seamlessly create and edit custom list views to rapidly find relevant data. See data faster with more intuitive list views. Visualize data with handy list view charts, or apply filters to slice the data as needed.
Search	Find records faster with improved search, which includes recent records and top results.
Setup Tree and Object Manager	Navigate setup pages with a simplified organization and a cleaner look and feel. Use the new Object Manager, which combines all standard and custom objects into a single list that is more easily searchable.

Is Lightning Experience Right for Your Salesforce Org?

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

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

SEE ALSO:

Supported Editions and User Licenses for Lightning Experience

Lightning Experience Considerations

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

EDITIONS

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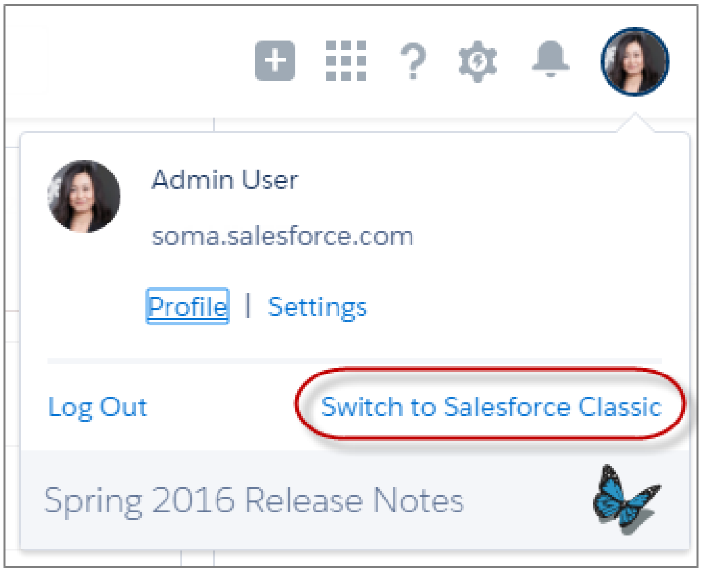
Salesforce Classic is still here, and we've made it easy for Lightning Experience users to move between the old and the new. So even if Lightning Experience isn't a perfect fit yet, you and your users can try it on for size without losing out.

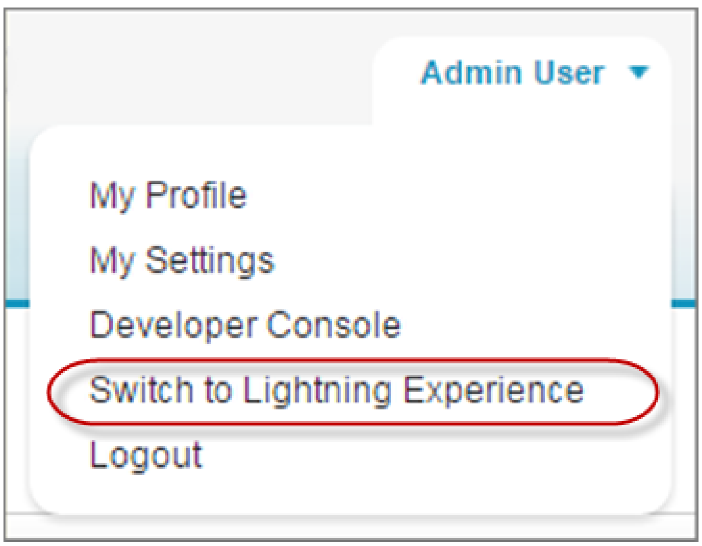
When users are first enabled for Lightning Experience, the new interface is their default, *preferred* experience. Ideally, your Lightning Experience users find that the new interface meets all their needs. But if there's an important feature or tool back in the classic interface, they can switch to Salesforce Classic at any time, without assistance from you.

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



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

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



The fact that your users have the power to move themselves between interfaces probably affects your decision about when to start using Lightning Experience. If Lightning Experience is missing only a few features that your team uses occasionally, asking users to switch between interfaces can be an acceptable trade-off given the benefits of the new experience. But it's best to keep users who need daily access to unsupported sales features or who work regularly with service features in Salesforce Classic—at least for now.

SEE ALSO:

Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

Supported Editions and User Licenses for Lightning Experience

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

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

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

Best Use Cases for Lightning Experience

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

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

- Your sales team does business-to-business sales using accounts, contacts, leads, opportunities, custom objects, and the other sales features supported in the new user interface.
- You want to pilot the new user interface with a group of sales reps.

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- You're looking to reboot your Salesforce implementation. This is a great opportunity to introduce new features because you're doing change management anyway.

Consider sticking with Salesforce Classic if:

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

Compare Lightning Experience and Salesforce Classic

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

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

Salesforce Data

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

Home

Feature	Lightning Experience	Salesforce Classic
Performance chart	✓	
Assistant	✓	
Account Insights	✓	
Top deals	✓	
Tasks	✓	✓

Feature	Lightning Experience	Salesforce Classic
Events*	✓	✓
Calendar*		✓
Feed and publisher		✓
Items to approve		✓
Customizable dashboards		✓
Customizable home page components		✓

* In Lightning Experience, Home displays only events remaining on a user's calendar today. Users can access all their events from the calendar link on Home or from the default navigation menu.

Accounts and Contacts

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

Campaigns (Beta)

Feature	Lightning Experience	Salesforce Classic
Campaign member status charts	✓	
Import campaign members	✓	✓
Add individual campaign members	✓	✓
Campaign member status updates via import	✓	✓

Feature	Lightning Experience	Salesforce Classic
Clone campaign members		✔
Add and manage campaign members from a list view		✔

Leads

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

Opportunities

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

Data.com

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

Reports

Feature	Lightning Experience	Salesforce Classic
Enhanced report charts	✓	
Hide totals and subgroups from report view	✓	
Create interactive filters when viewing reports	✓	
Report Builder	✓	✓
Bucket fields	✓	✓
Custom summary formulas	✓	✓
Matrix, Summary, Tabular report formats	✓	✓
Table, Funnel chart types	✓	✓
Report folder sharing*		✓
Create report folders		✓
Joined reports		✓
Cumulative Line, Multimetric, Pie, Scatter chart types		✓
Schedule report refreshes		✓
Follow reports		✓
Report notifications		✓
Export reports		✓

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

Dashboards

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

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

List Views

Feature	Lightning Experience	Salesforce Classic
Charts	✓	
Create filters on the fly	✓	
Create and edit lists	✓	✓
Sortable columns	✓	✓
Resizable columns	✓	✓
Sharing Settings*	✓	✓
Advanced filter logic		✓

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

Other Features and Products

Feature	Lightning Experience	Salesforce Classic
Activities-related composer windows	✓	
Create and edit records	✓	✓

Feature	Lightning Experience	Salesforce Classic
Inline editing record detail fields	✓	✓
Inline editing in lists		✓
Forecasting		✓
Territory Management		✓
Salesforce Communities*		✓
Partner Portals		✓
Service Cloud		✓
Work.com		✓

* Setup for Salesforce Communities is available in Lightning Experience but creating, managing, and working in your communities is only available in Salesforce Classic.

What's the Fate of Existing Salesforce Customizations?

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

Lightning Experience Navigation Menu

Lightning Experience replaces the Salesforce Classic tab bar with a collapsible navigation menu along the left side of the page. Customizations made to the tab bar in the classic interface aren't reflected in the navigation menu. Instead, you can create multiple custom navigation menus and assign them to user profiles. Which means you can empower different types of users, like sales reps, sales managers, and execs, with a navigation experience that's unique to their business needs.

You can add a wide variety of items to a custom navigation menu, including many standard Salesforce objects, your custom objects, Lightning component and Visualforce tabs, and other items like Home, the main feed, people, groups, files, dashboards, reports, and the user's task list and calendar.

In fact, most of the items that appear in the App Launcher can go in a custom navigation menu. The few exceptions include connected apps, Lightning Page tabs, and some Salesforce objects that aren't supported in Lightning Experience. Items that can't go in a custom navigation menu are always available from the App Launcher by clicking in the header.

To learn more, see Customize Lightning Experience Navigation Menus and Navigation and Actions: What's Not in Lightning Experience in the Salesforce Help.

Page Layouts and Compact Layouts

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

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

Actions and Buttons

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

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

- Global actions with the Log a Call action type or the Create a Record action type for events, notes, and tasks display in the Global Actions menu in the header.
- Most quick actions, productivity actions, standard buttons, and supported custom buttons are added to the page-level action menu.
- Object-specific activities-related actions, such as Log a Call, New Event, New Task, and Email, display in the composer on the Activity tab.
- Standard Chatter actions appear in the composer on the Collaborate tab.

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

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

Custom Buttons

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

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

Visualforce and Lightning Components

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

Here are a few basic details to consider.

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

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

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

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

Force.com Canvas

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

Salesforce APIs and Apex

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

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

AppExchange Apps

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

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

Preview Your Org in Lightning Experience

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

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

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

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USER PERMISSIONS

To view the Lightning Experience Migration Assistant:

- "View Setup and Configuration"

To edit the Lightning Experience Migration Assistant:

- "Customize Application"

Transition to Lightning Experience: Let's Do This!

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

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

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

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

Your rollout will likely fall into these phases.

Learn	• Learn about Lightning Experience • Identify stakeholders and an executive sponsor • Educate your company with presentations and demos • Review Compare Lightning Experience and Salesforce Classic and Lightning Experience Considerations • Conduct a gap analysis to confirm you're getting what you need
Launch	• Identify users for a pilot of Lightning Experience • Identify and activate super users • Create the project schedule • Define measures for success • Create and execute your marketing and training strategies • Customize and test, ideally in a sandbox environment • Go live!
Iterate	• Evaluate how things are working to see if you're hitting your success metrics • Survey your users for satisfaction and pain points • Use reports and dashboards to track metrics and feedback

- Deliver an executive summary

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

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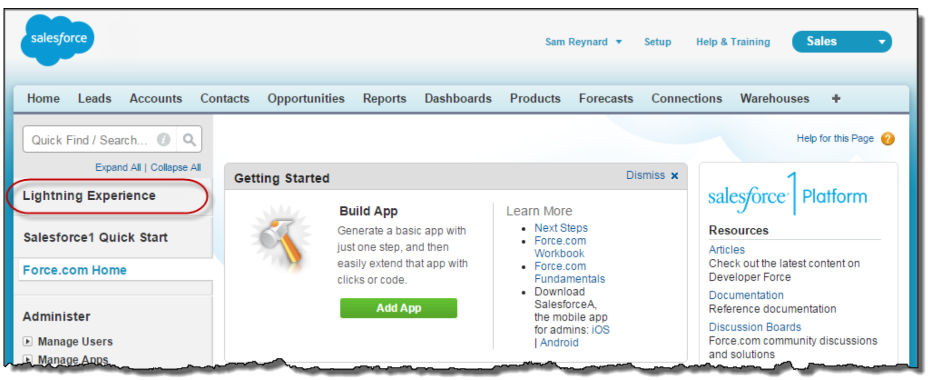
Use the Lightning Experience Migration Assistant as your control center for tackling these steps. From Setup in Salesforce Classic, click **Lightning Experience**.



Recommended Features for Lightning Experience

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

Set Up Users for Lightning Experience

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

Turn on Lightning Experience for Your Org

You've knocked off the “Learn” and “Launch” items in your rollout plan. You've set up the Salesforce features that optimize the new user interface. You've enabled the right users—and they're trained and expecting the exciting changes coming their way. You're ready to go live! Fortunately, it’s easy to turn on Lightning Experience using the Migration Assistant.

SEE ALSO:

Supported Editions and User Licenses for Lightning Experience

Recommended Features for Lightning Experience

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Related Files

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

Enhanced Notes

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

Sales Path

Make it easy for sales reps to follow your organization’s sales process and get deals to closed. Customize your opportunity stages and lead statuses, and the order you want them to appear in the Sales Path on opportunity and lead workspaces. Then take it up another notch and add your own coaching steps for each stage or status in the Sales Path.

Duplicate Management

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

Lead Conversion

Keep your sales process moving by allowing your sales reps to convert qualified leads to contacts, accounts, or opportunities. Add the Convert button to the Lead page layout.

Account Insights

Give your reps instant access to relevant, timely news articles about their accounts. This feature is available in English only, so if your organization uses a different primary language, you might not want this option. (For information about privacy issues with this feature, see Account Insights in the Salesforce Help.)

Social Accounts, Contacts, and Leads

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

Shared Activities

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

Set Up Users for Lightning Experience

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

Important: Okay, if you use Group Edition that's overstating things. It's not possible to remove the "Lightning Experience User" permission from your org's standard profiles and custom profiles aren't available. So it's "all or nothing" if you want to turn on Lightning Experience—all your users switch immediately to the new interface. Be sure to prepare your users for their new Salesforce experience and give them advance notice before you change to Lightning Experience. And remember, users who prefer to remain in Salesforce Classic can always switch themselves back via the Switcher.

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

EDITIONS

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

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

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

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

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

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

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

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

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

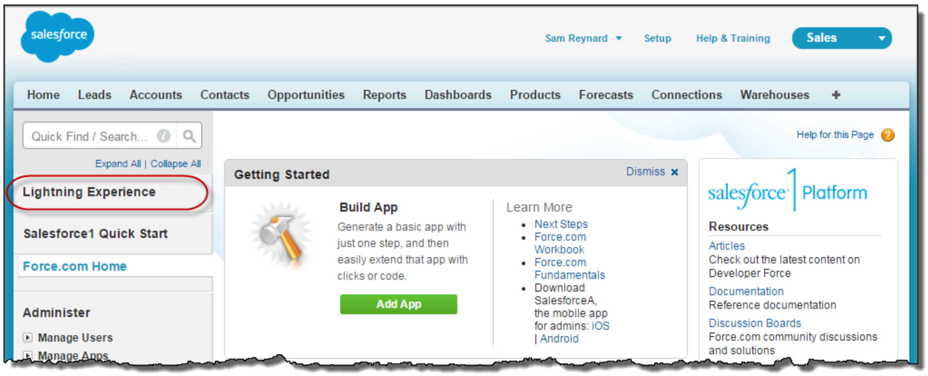
SEE ALSO:

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

Turn on Lightning Experience for Your Org

You've knocked off the “Learn” and “Launch” items in your rollout plan. You've set up the Salesforce features that optimize the new user interface. You've enabled the right users—and they're trained and expecting the exciting changes coming their way. You're ready to go live! Fortunately, it’s easy to turn on Lightning Experience using the Migration Assistant.

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



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

EDITIONS

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

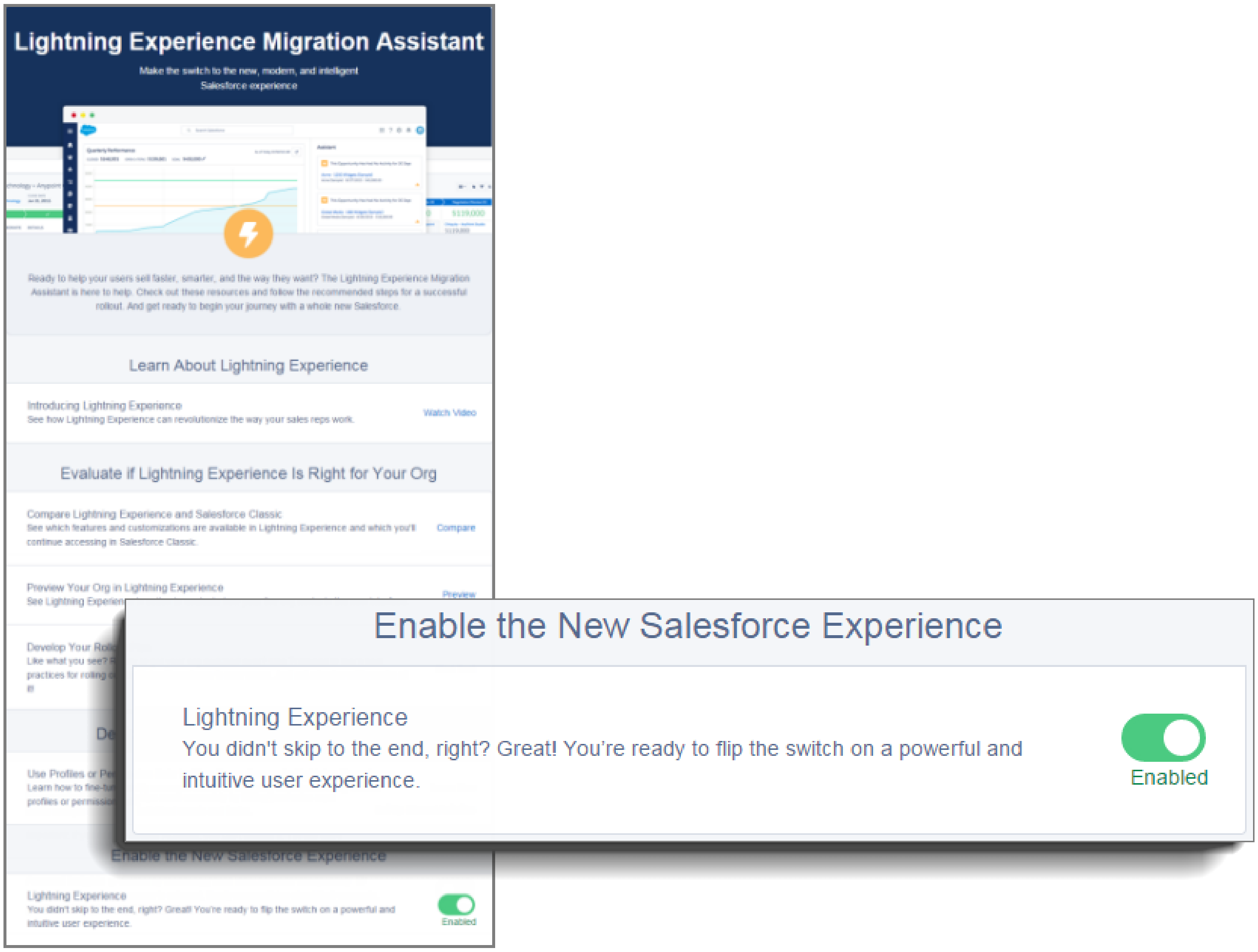
USER PERMISSIONS

To view the Lightning Experience Migration Assistant:

- “View Setup and Configuration”

To edit the Lightning Experience Migration Assistant:

- “Customize Application”



That's it! The users you've enabled automatically start enjoying Lightning Experience when their current session refreshes or when they log in.

Disable Lightning Experience for Your Org

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

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

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

EDITIONS

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

USER PERMISSIONS

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

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

Find Your Way Around Lightning Experience

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

EDITIONS

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

Find Profile and Personal Settings in Lightning Experience

In Salesforce Classic, your profile and personal settings are located in the menu with your name. It's not too different in Lightning Experience. Find links to both of these options by clicking your profile picture. Want to switch between Lightning Experience and Salesforce Classic? You'll find links for that, too.

Find Your Stuff in Lightning Experience

In Salesforce Classic, you use tabs to access objects, like accounts and leads. Tabs also serve up other features, such as your Home page or Chatter. Lightning Experience replaces the tab bar with a collapsible navigation menu that includes objects, apps, and other goodies. Looking for connected apps? If an item isn't in the navigation menu, look in the App Launcher.

Find List Views in Lightning Experience

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

Find Your Way Around Records in Lightning Experience

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

Find Actions and Buttons in Lightning Experience

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

Find Related Lists in Lightning Experience

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

Find Chatter Features in Lightning Experience

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

Find Help in Lightning Experience

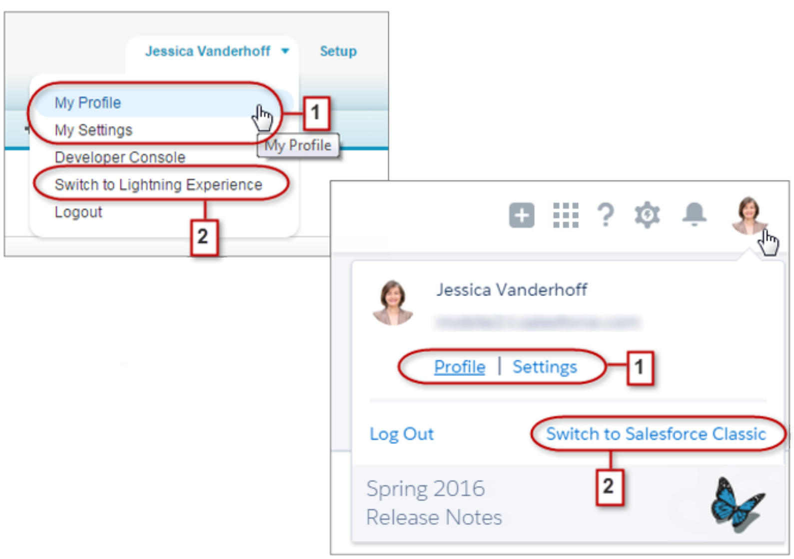
Help is here! And it's better than ever in Lightning Experience, where the contextual Help menu serves up targeted content like videos, walkthroughs, help topics, and trails. Bonanza!

Find Profile and Personal Settings in Lightning Experience

EDITIONS

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

In Salesforce Classic, your profile and personal settings are located in the menu with your name. It's not too different in Lightning Experience. Find links to both of these options by clicking your profile picture. Want to switch between Lightning Experience and Salesforce Classic? You'll find links for that, too.



In Lightning Experience, click your profile picture to find links to your profile and personal settings (1). By the way, before you add a photo, you look like this: . That's probably not a great likeness, so click **Profile** to add a photo and become human!

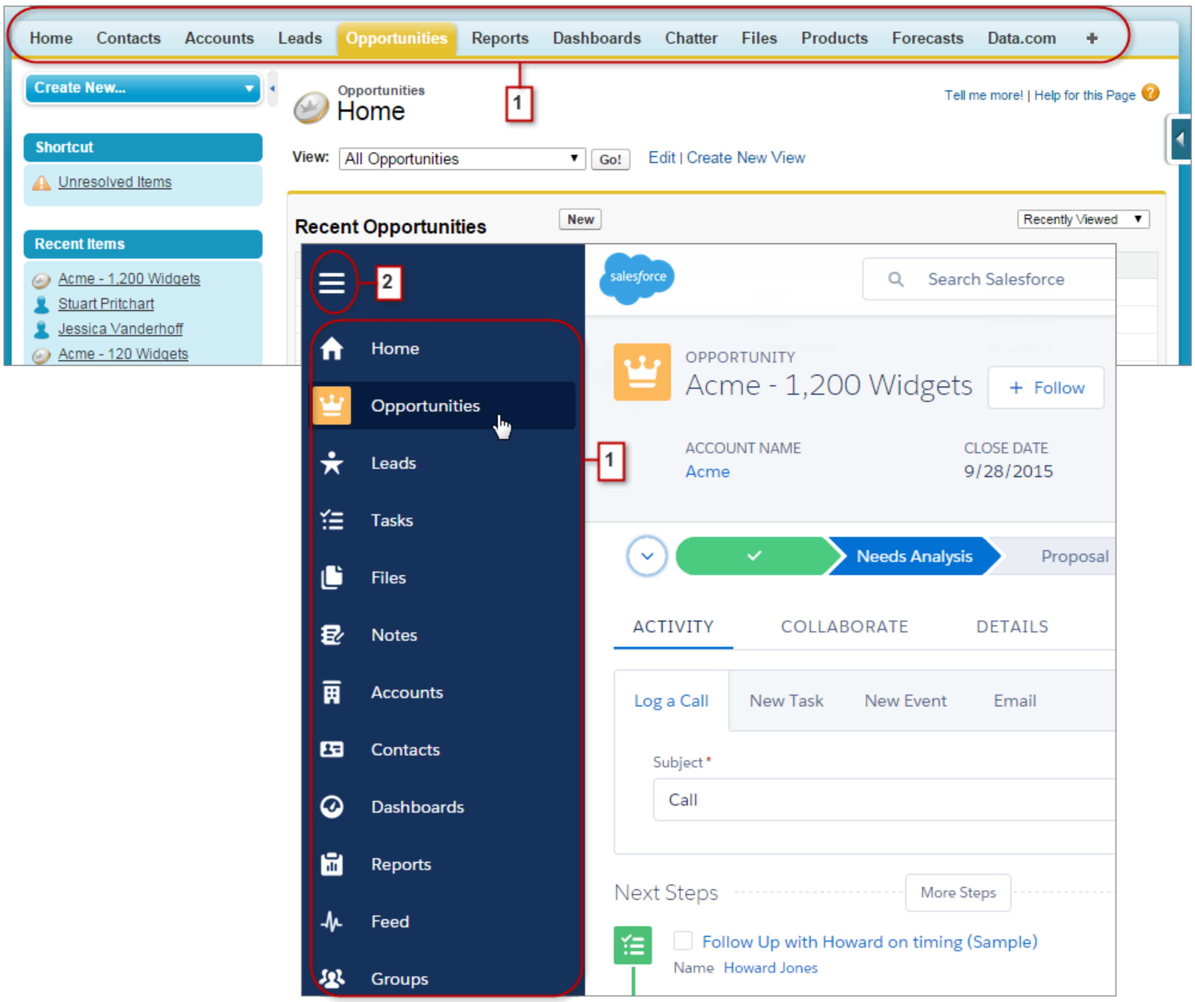
If you need to head back to Salesforce Classic, use the Switcher (2). We remember your choice and set it as the default. Want to switch back to Lightning Experience? Just click your name in the Salesforce Classic header, then click the Switcher (2).

Find Your Stuff in Lightning Experience

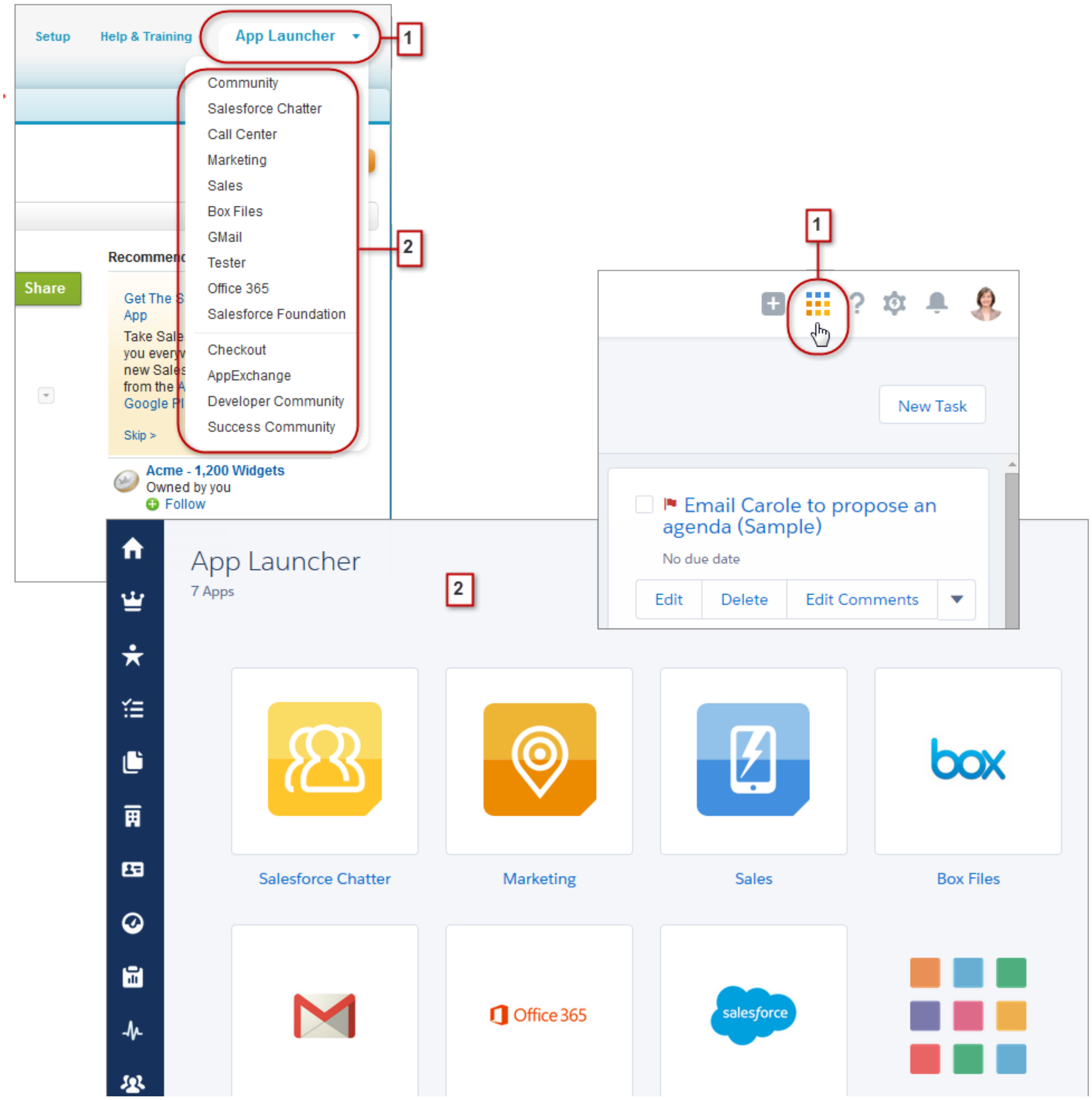
In Salesforce Classic, you use tabs to access objects, like accounts and leads. Tabs also serve up other features, such as your Home page or Chatter. Lightning Experience replaces the tab bar with a collapsible navigation menu that includes objects, apps, and other goodies. Looking for connected apps? If an item isn't in the navigation menu, look in the App Launcher.

EDITIONS

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



In Lightning Experience, use the navigation menu to access items like Home, Salesforce objects, the Chatter feed, groups, and people, dashboards and reports, productivity tools, and apps. Your org can use the default navigation menu or custom ones that are assigned to user profiles and give users just what they need. Simply click the icon for the item you want (1). Scroll down to see everything in the menu. Click the navigation menu icon (2) to expand the menu and show item names. Collapse it when you're familiar with the items' icons.



You use the App Launcher Force.com menu (1) in Salesforce Classic to access available apps. In Lightning Experience, hover over the App Launcher icon (1), watch it go all *rainbow*, then click to find your apps on the App Launcher page (2).

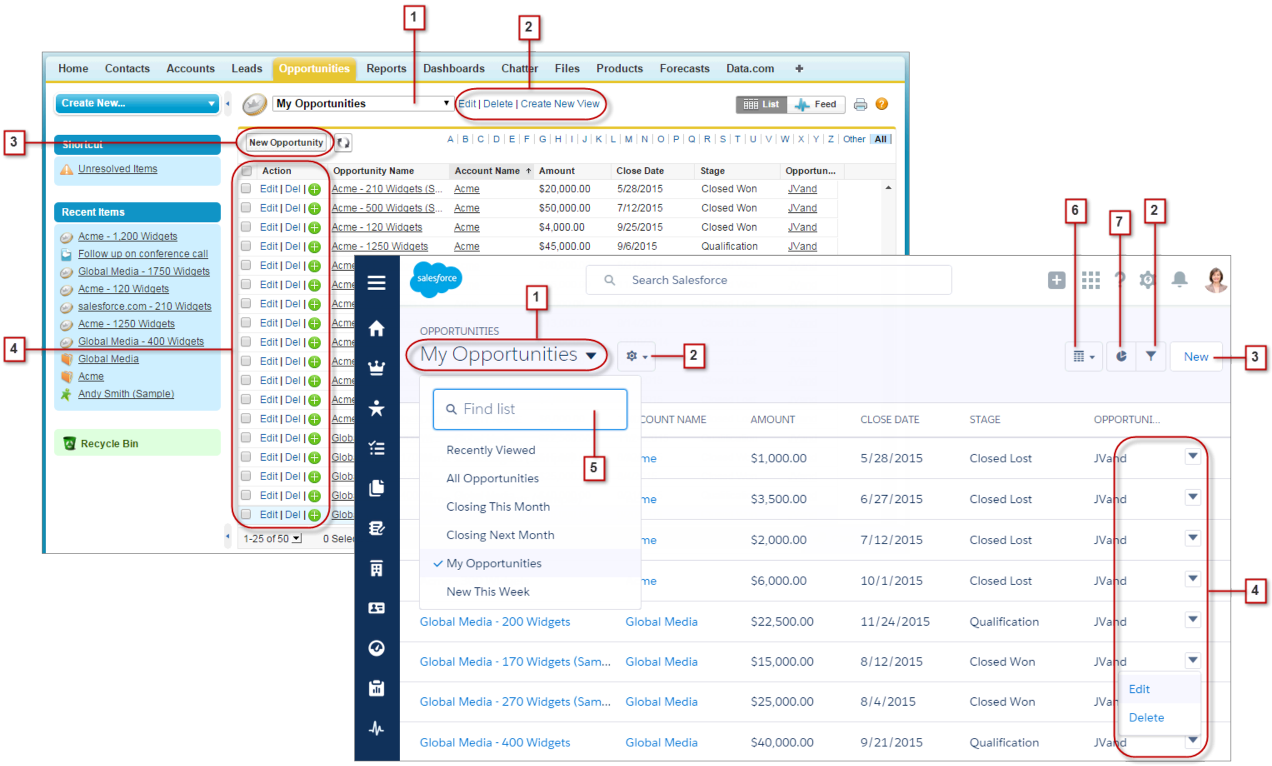
Looking for an item that's not in the navigation menu or not yet available in Lightning Experience? Click the tile for the feature's cloud, then scroll down for links to that feature. Clicking a link opens the feature in Salesforce Classic in a separate browser tab. For example, to use Collaborative Forecasts, click **Sales**, then scroll down for the **Forecasts** link. Click it to show the Forecasts tab in a separate browser tab in Salesforce Classic.

Find List Views in Lightning Experience

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

EDITIONS

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



- Select a list view from the drop-down menu (1).
- Create, edit, or delete list views (2). Use to quickly modify a view's filters and refine which records are displayed.
- Create records (3) directly from a list view.
- Edit or delete (4) specific records.

List views in Lightning Experience include several new features that aren't available in Salesforce Classic.

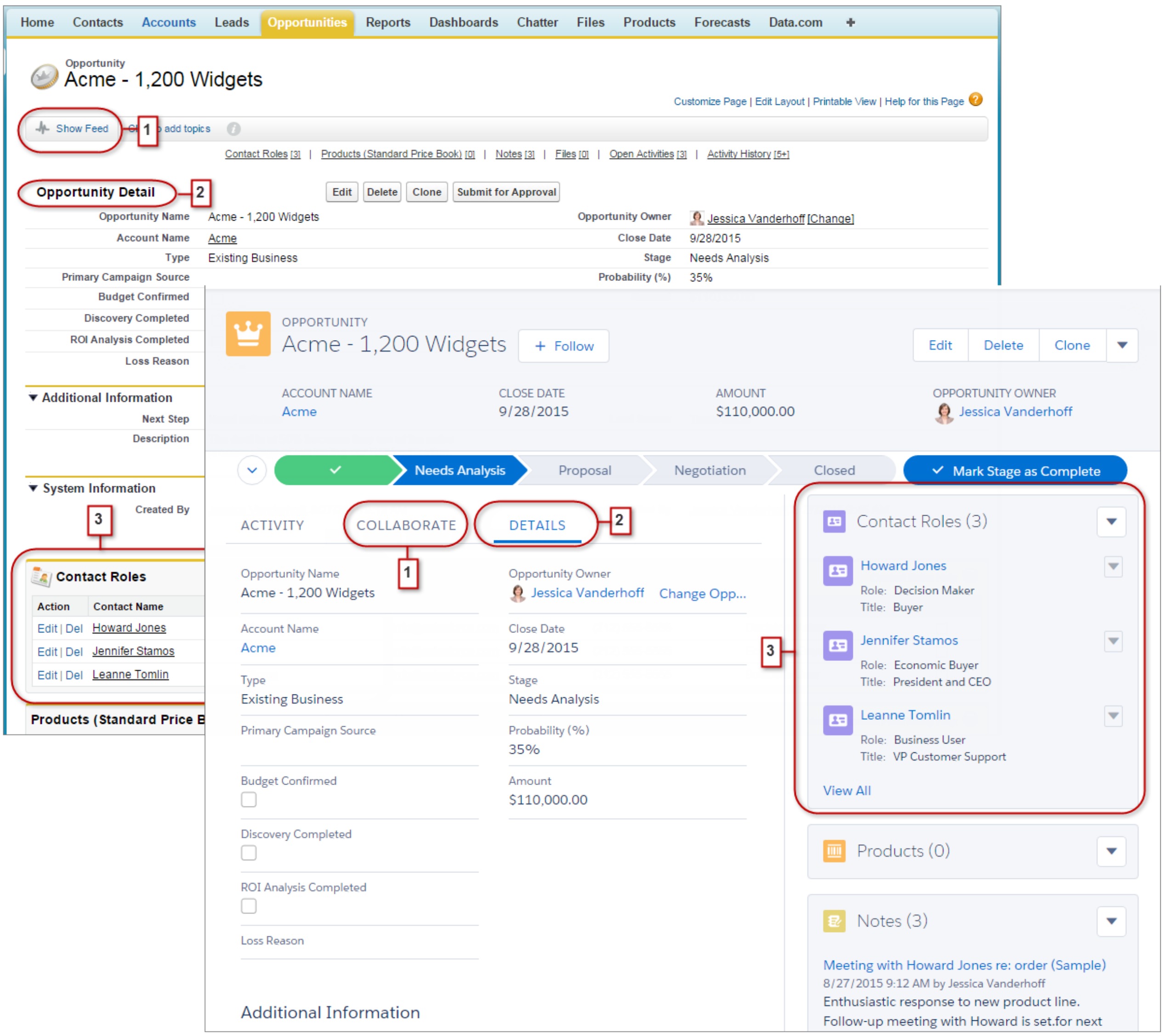
- Find a specific list view faster by searching for it (5).
- On opportunities only, toggle between the standard list view grid and the new Opportunity Board (6), a visual way to monitor the pipeline.
- Visualize list view data in one of several types of charts: vertical bar, horizontal bar, or donut (7).

Find Your Way Around Records in Lightning Experience

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

EDITIONS

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



- In Salesforce Classic, Show Feed (1) controls whether a record's Chatter feed is visible. In Lightning Experience, the record's feed and the feed composer are always available on the Collaborate tab (1).
- See all record details on the Details tab (2).

- In Salesforce Classic, records include related lists (3), while Lightning Experience displays related information in related list cards (3). See Find Related Lists in Lightning Experience for a deeper examination of how related information is handled in the new and classic interfaces.

SEE ALSO:

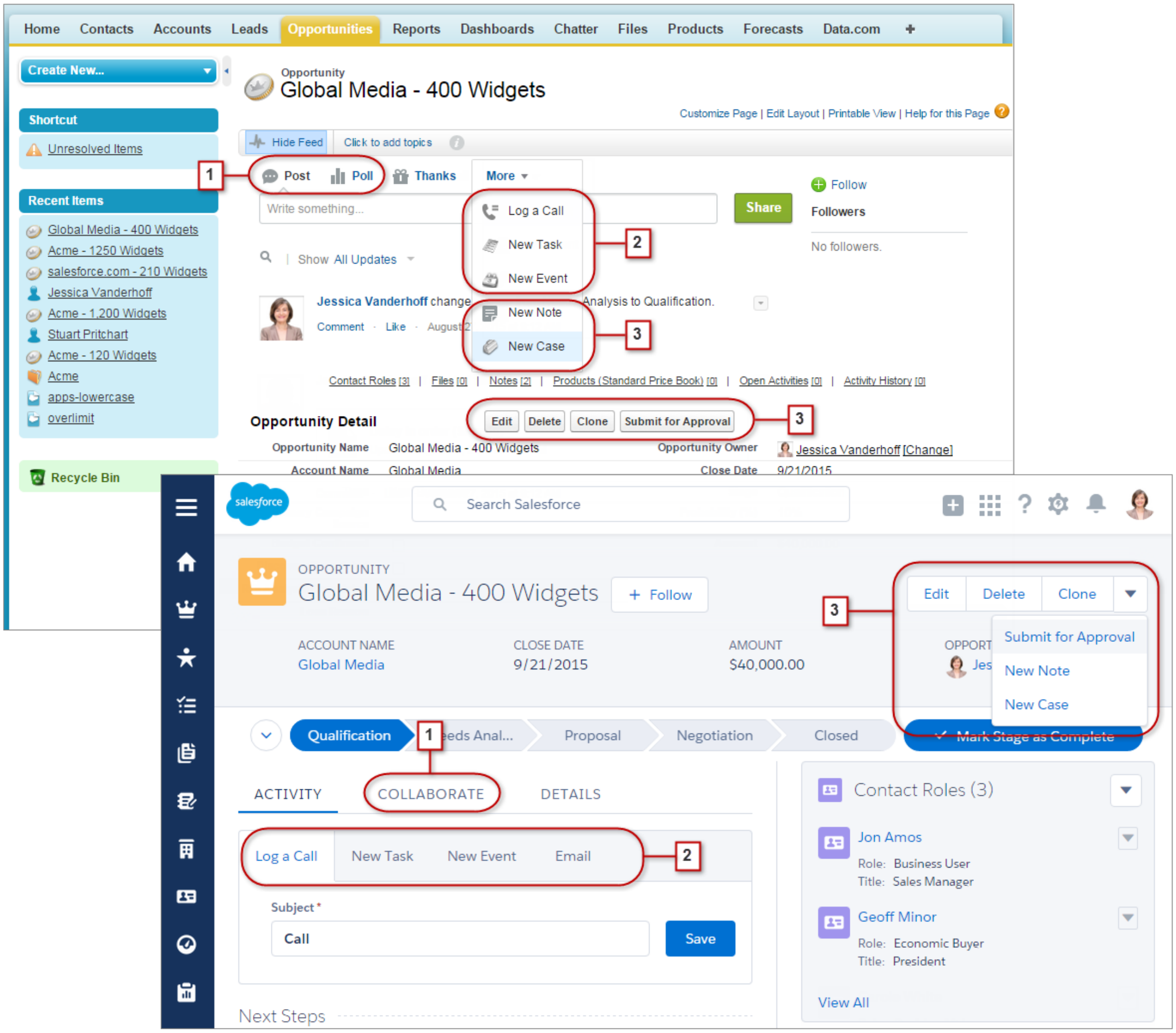
Find Actions and Buttons in Lightning Experience

Find Actions and Buttons in Lightning Experience

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

EDITIONS

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



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

  Or use the Global Actions menu ( ) in the header to log a call or create events, notes, and tasks that aren't related to the current record.
- Standard and supported custom buttons (3) on the page layout—including the Edit button—appear in the action menu. And any other global and object-specific actions, including Visualforce and Force.com Canvas actions, appear in the menu as well.
- As in Salesforce Classic, custom links are included with the record's details. Click the Details tab to find them.

SEE ALSO:

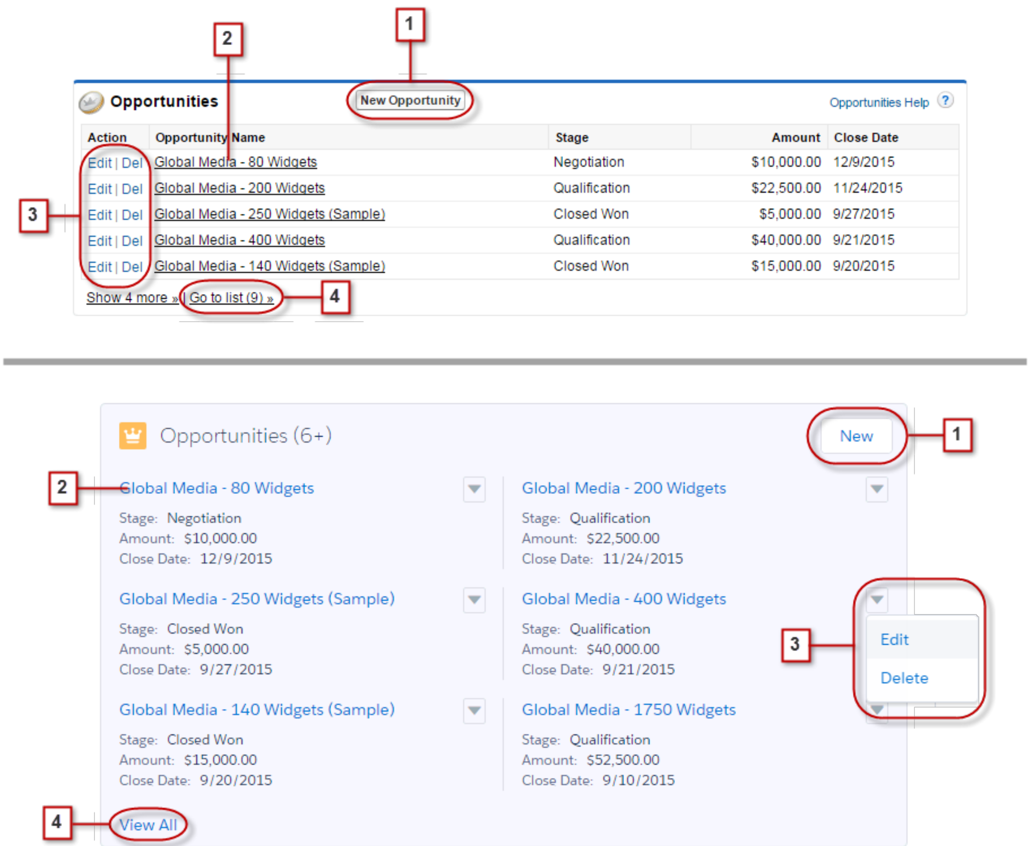
Navigation and Actions: What's Not in Lightning Experience

Find Related Lists in Lightning Experience

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

EDITIONS

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



For the first eight related list cards on a record:

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

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

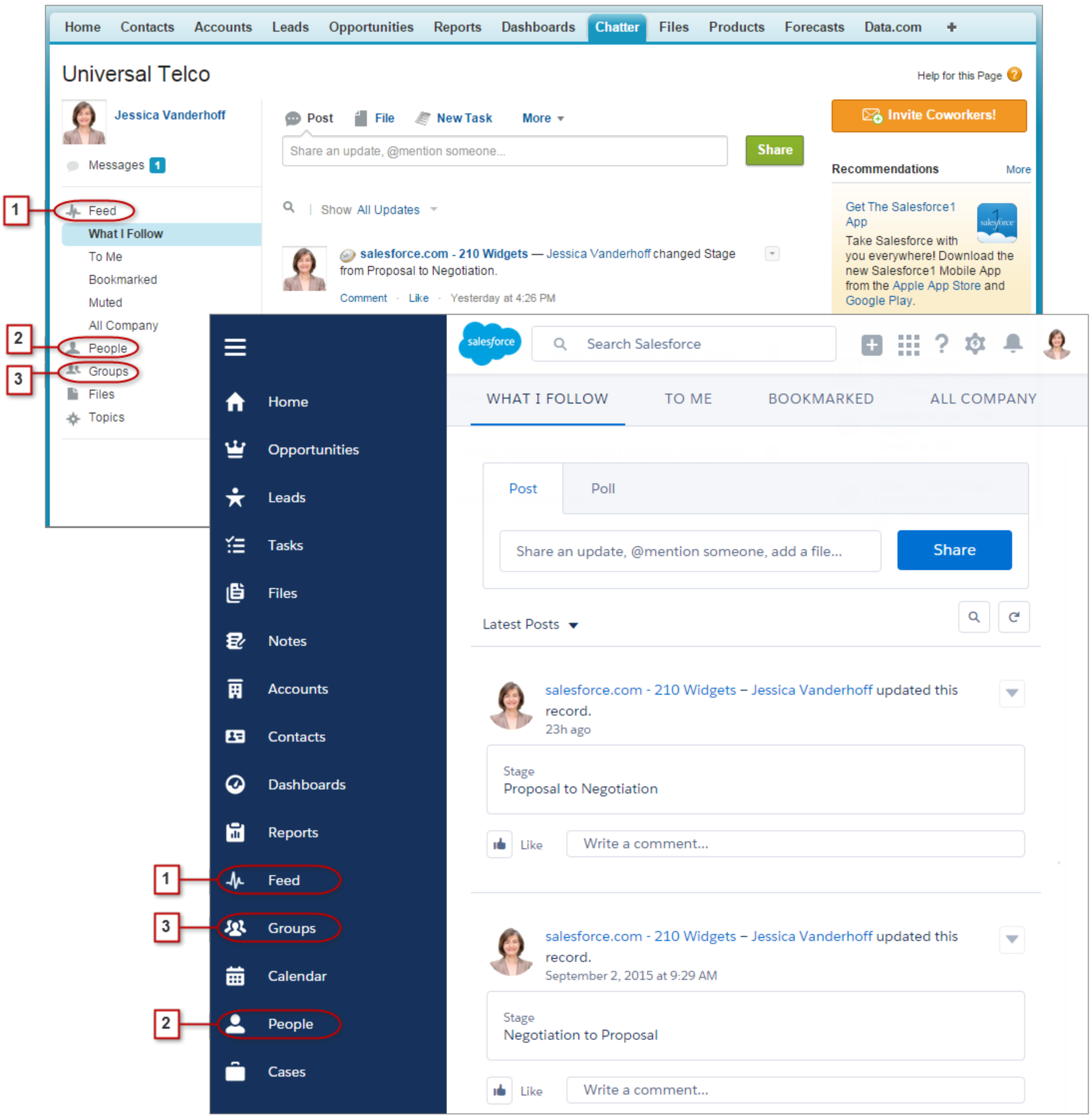
Find Chatter Features in Lightning Experience

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

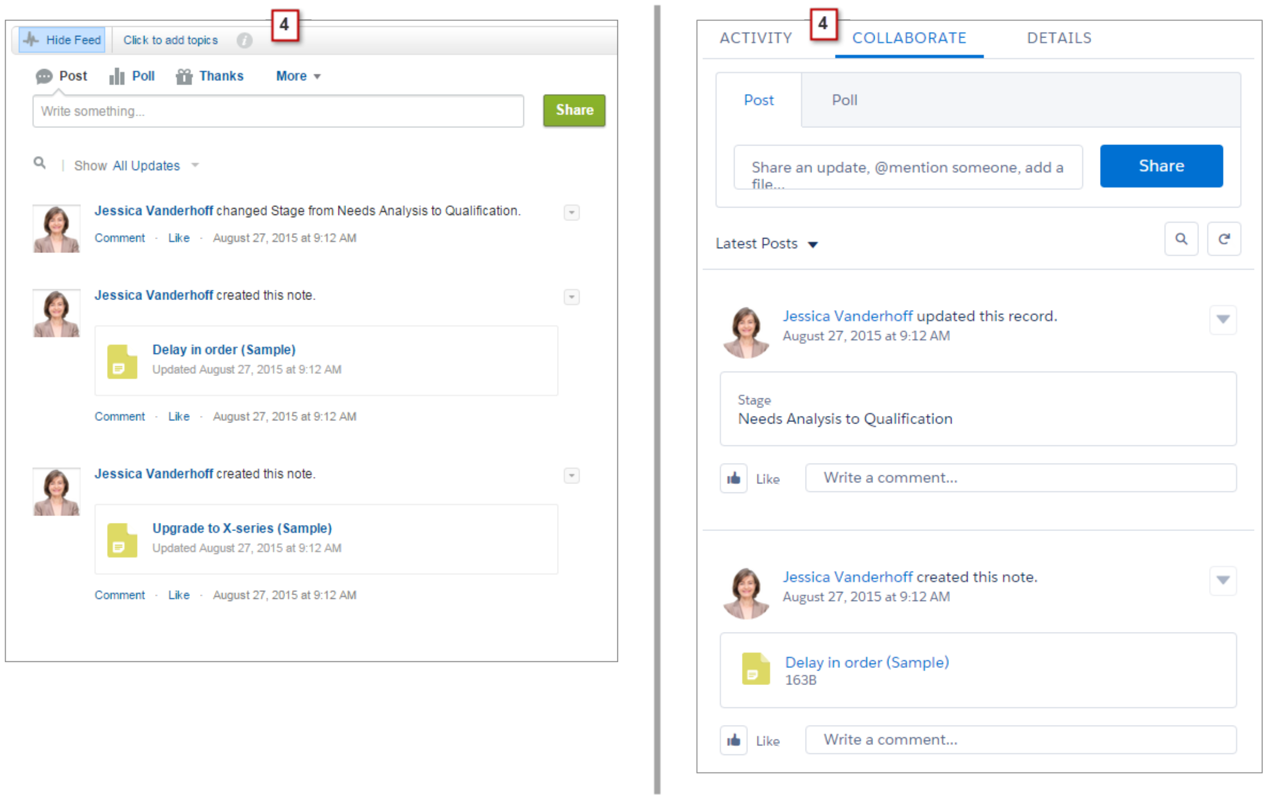
In Salesforce Classic, you typically access Chatter features from the sidebar on the Chatter tab. In Lightning Experience, access the main feed (1), colleagues' profiles (2), and groups (3) directly from the navigation menu.

EDITIONS

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

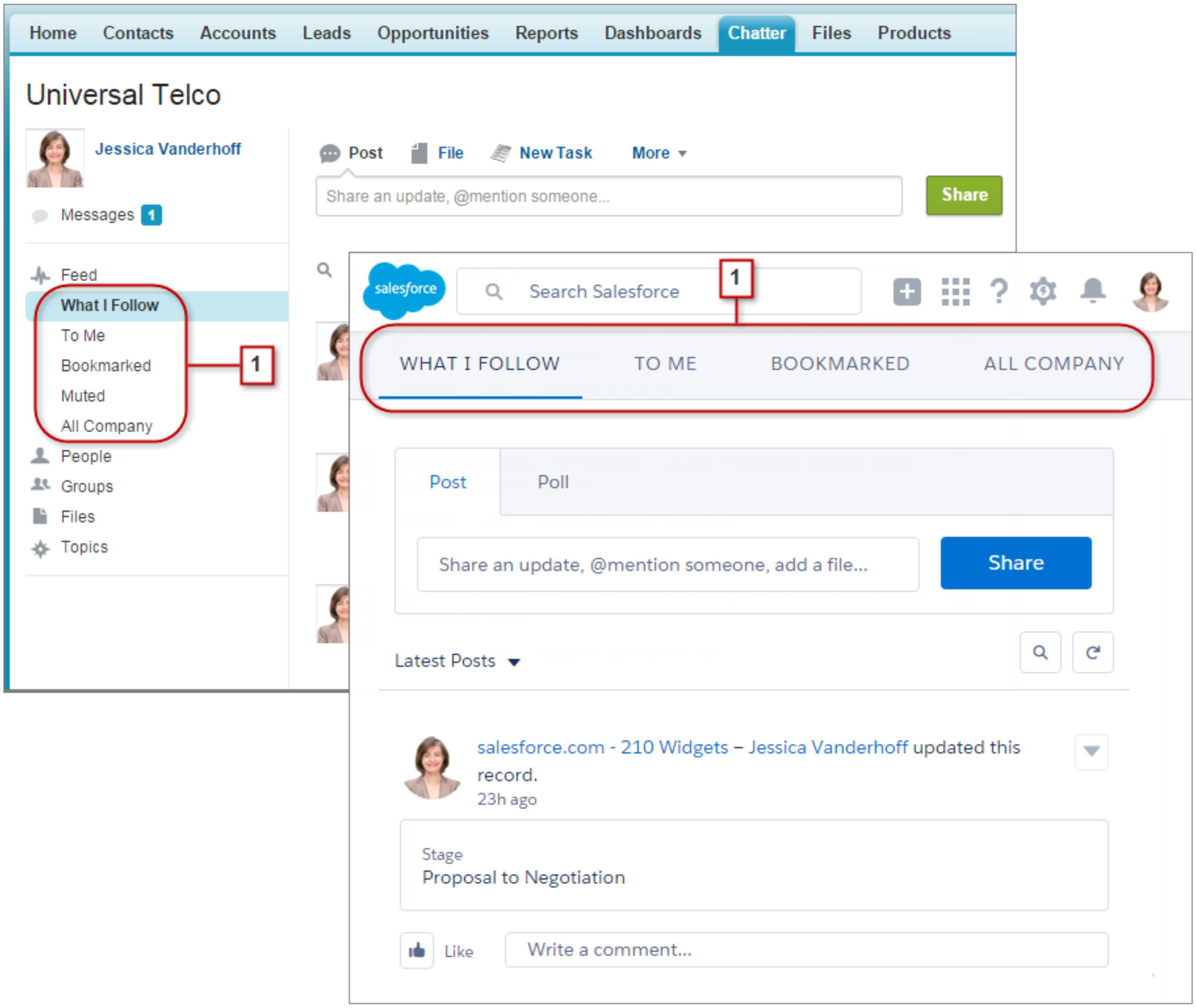


To collaborate on records (4), look for the Collaborate tab in Lightning Experience. You can post updates, create polls, and share files, just like in Salesforce Classic. But now there's no more fussing with the Hide Feed and Show Feed links.

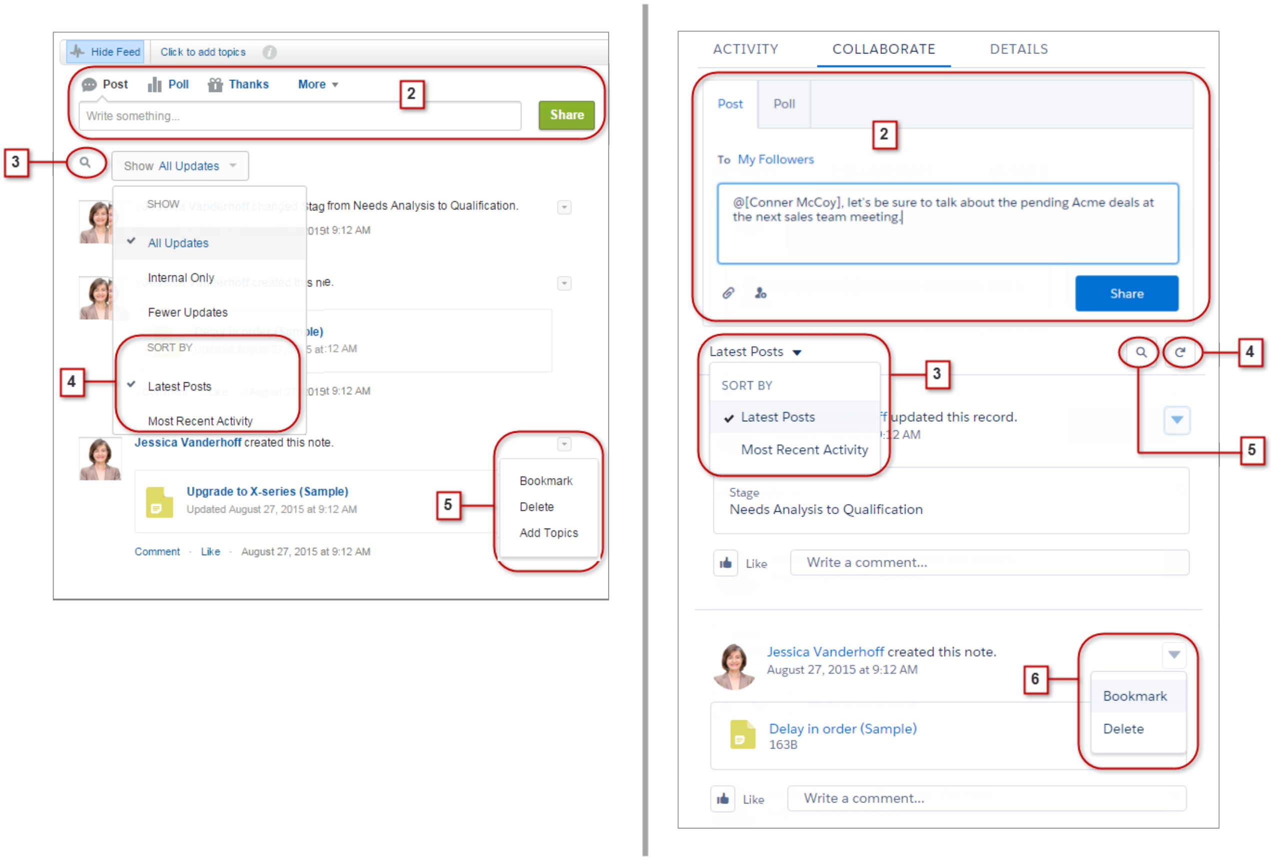


Work with Feeds

You can change the main Chatter feed to show a particular subset of posts (1). In Lightning Experience, use the tabs at the top of the page. The What I Follow feed continues to be the default feed.



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



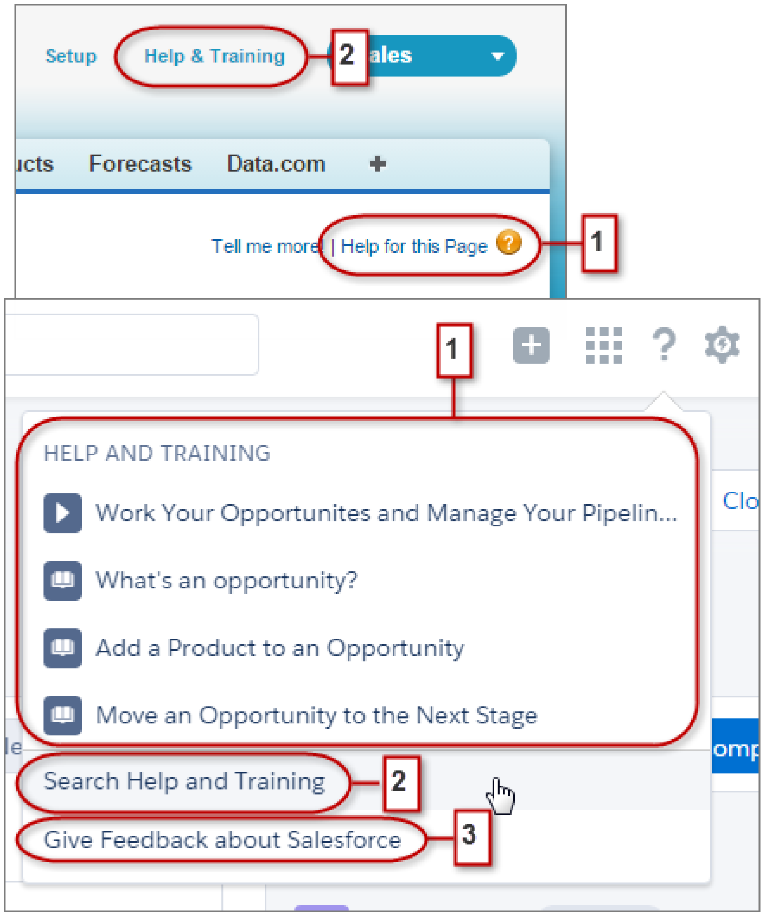
- The Post and Poll actions are available in the composer (2) on the Collaborate tab. Click the composer to access buttons for uploading a file or mentioning people. Other standard Chatter actions that appear in the publisher in Salesforce Classic, including Thanks and Links, aren't available in Lightning Experience.
- Sort the feed (3) by most recent posts or comments. Options to filter a feed aren't available in Lightning Experience.
- In Lightning Experience, refresh the feed (4) to see up to date information.
- Locate information in a specific feed with feed search (5).
- Acting on a post (6) is the same in both interfaces. But topics aren't available in Lightning Experience.

Find Help in Lightning Experience

Help is here! And it's better than ever in Lightning Experience, where the contextual Help menu serves up targeted content like videos, walkthroughs, help topics, and trails. Bonanza!

EDITIONS

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



In Salesforce Classic, most pages and related lists link to a single contextual help topic. With the Lightning Experience Help menu (1), we provide lots more options, with links to videos, walkthroughs, help topics, and trails—whatever is most relevant to what you're working on.

Both interfaces include links to the main Help & Training portal (2). But the link in Lightning Experience saves time, taking you right to the search page so that you can quickly find the help you need.

We need your feedback! Just click the Give Feedback link (3) to share your comments about Lightning Experience or anything else Salesforce. Thanks!

Lightning Experience Considerations

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

EDITIONS

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

Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

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

What's Not Available in Lightning Experience

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

What to Expect in Lightning Experience When Chatter Is Turned Off

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

Gotchas If Users Switch Between Lightning Experience and Salesforce Classic

EDITIONS

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

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

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

User Has the "Lightning Experience User" Permission?	User's Default Experience	Where Links Open
Yes	Lightning Experience	For pages supported in Lightning Experience, links open in the new interface (even for links generated in Salesforce Classic). Links to unsupported pages are directed to Salesforce Classic, which opens in a new tab. This temporary redirection doesn't change the user's default preference to Salesforce Classic. The next time the user selects a link that is supported in the new interface, the Salesforce Classic tab is reloaded to open the link in Lightning Experience.
Yes	Salesforce Classic	Links generally open in Salesforce Classic. If a link was generated in Lightning Experience (meaning it includes `/one/one.app` in the URL), the link opens in Lightning Experience. The user's default preference doesn't change to Lightning Experience.

User Has the "Lightning Experience User" Permission?	User's Default Experience	Where Links Open
No	Salesforce Classic	Links open in Salesforce Classic only. If a link was generated in Lightning Experience (meaning it includes `/one/one.app` in the URL), the link doesn't open, because the user can't access Lightning Experience.

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

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

SEE ALSO:

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

What's Not Available in Lightning Experience

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

EDITIONS

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

Apps and Packaging: What's Not in Lightning Experience

SEE ALSO:

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

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

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

Objects

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

- Accounts
- Assets
- Campaigns
- Cases
- Contacts
- Dashboards
- Events
- Files
- Leads
- Notes
- Opportunities
- Person Accounts
- Price Books
- Products
- Reports
- Tasks
- Work Orders
- Custom objects
- External objects

Fields

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

Related Lists

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

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

- In Lightning Experience, related lists appear in related list cards on record home pages. The first eight related lists show related list buttons, the first several records from the list, and a link to open the full list of records. For any additional related lists, only the list name appears in the card. Users can still work with these related lists—simply click the related list name to access the full list. Here, users can see records in the list and use related list buttons (such as **New**) or row-level record actions.
- Lightning Experience includes new Files and Notes related lists, as well as the classic Notes & Attachments related list. If you're using Salesforce Files or the enhanced Notes feature, include all these related lists on your object page layouts.
  - Files and attachments are two different types of objects, and always have been. Unlike files, attachments are associated only with a particular record and can't be shared further. In Lightning Experience, uploads to the Notes & Attachments related list are files. In Salesforce Classic prior to Spring '16, uploads to this related list were always attachments instead of files. For existing orgs, this means that the Notes & Attachments list can contain a mix of attachments that were uploaded in Salesforce Classic and files added in Lightning Experience.

    In the API, any existing integrations that retrieve attachments from the Notes & Attachments list don't include any files uploaded to the list in Lightning Experience. A new API call is necessary to retrieve files as well as attachments.
  - Notes created with the old note-taking tool in Salesforce Classic are available from the Notes & Attachments related list only. Any notes created with the enhanced version of Notes appear in the Notes related list only.
- For Group Edition users, the Contacts related list doesn't display on accounts.
- When the Opportunity related list is used on a contact record to add a new or existing opportunity to the contact, Salesforce adds the contact to the Contact Roles related list on the opportunity.
- Lightning Experience merges a product's standard and custom price book entries into a single Price Books related list. This is different from Salesforce Classic, which has separate related lists for Standard Prices and Price Books. If you previously removed the Price Books related list because your org uses standard prices only, you should add it back to the Product page layout so your users can see standard prices in Lightning Experience.
- On the detail page for objects that support activities, Salesforce doesn't display the Open Activities and Activity History related lists along with other related lists. It displays the activity timeline instead. Objects that support activities include opportunities, leads, accounts, contacts, and custom objects on which you enable activities.

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

Object Home

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

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

List Views

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

- Following records directly from a list
- Sharing list views with groups
- Clone list views

- Mass actions, including modifying or deleting multiple items in a list at once, sending mass email, or adding multiple records to a campaign
- Custom actions or custom buttons
- Advanced filter logic
- Drag-and-drop scheduling for account, contact, and lead list views
- Feeds
- The icon to create a printable view of a list

List views display and behave differently in Lightning Experience.

- You don't go to a new page to create a list view. Instead, you stay on the same page and give the list view a name in a pop-up dialog box. You add filters to customize your list with a panel that slides out on the right side of the page.
- You can only restrict list views by selecting All or My. Other options, such as restricting by queue, campaign, or price book, aren't available.
- Navigation through list views has changed. Because list views have infinite scrolling, you can't specify the number of records to show per page. Also, you can't navigate through pages with arrow buttons, and you can't jump to a specific page of results. Jumping to records with names that start with a particular letter isn't available.
- The drop-down menu shows up to 200 views. Recently viewed lists are displayed first, followed by other list views in alphabetical order. Although only 200 views are displayed in the menu, you can search up to 2,000. If you have more than 2,000 list views, some views aren't returned in the search results. You can switch back to Salesforce Classic to find all your list views.
- You can't change the order of columns by dragging the column heading to a new position in the table. Instead, you change the columns that appear and their order by choosing **Select Fields to Display** from the List View Controls drop-down menu. If you add or remove a column in Lightning Experience, all custom column widths are deleted. You can switch back to Salesforce Classic to adjust column widths.
- Limited row-level actions are available. For most objects, available actions are Edit and Delete. For leads, two more actions are available: Convert and Clone. For files, available actions are Edit, Delete, and Download.
- For filter criteria, only these relative date ranges are supported: Today, Tomorrow, Yesterday, This Week, This Month, This Quarter, This Year, Last Week, Last Month, Last Quarter, Last Year.
- List views in Lightning Experience don't support *`starts with`* as a filter criterion for ID fields. An ID field is a 15-character field that identifies a record. For example, the `Account ID` field on the contact object identifies which account a contact is associated with. You *can* use *`starts with`* as a filter criterion for other fields.
- The name of the recent records list that displays on the home page for every standard and custom object is different in Lightning Experience. It's called Recently Viewed. This view isn't deletable, filterable, or editable. Salesforce admins can use the Object Manager in Setup to select and order columns for this view. Your users can sort items in the view by clicking inside a column header. An arrow in the column header shows if the list items are sorted in ascending or descending order.
- Another list view is available for most standard objects via the drop-down list with a name similar to Recently Viewed. The name of this view includes the name of the object. For example, this list view for accounts is called Recently Viewed Accounts. These two list views, Recently Viewed and Recently Viewed *Objects*, show the same records. The Recently Viewed *Objects* list view isn't deletable, filterable, or editable. Your users can sort the records and chart this list view's data. They can switch to Salesforce Classic to reorder the columns displayed in the list view. The columns appear in the new order when the user switches back to Lightning Experience.

Work with Data

Create and Edit Data

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

These features aren't available in Lightning Experience.

- Inline editing on lists or records
- Editing multi-line layouts

Print Data

These features aren't available in Lightning Experience.

- Printing a page
- Generating a PDF file

Salesforce Sidebar

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

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

Recycle Bin

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

Accessibility

- Accessibility mode isn't provided because it's not needed in Lightning Experience. The interface is designed according to the latest accessibility standards, so screen readers are supported natively.
- The color-blind palette isn't available in Lightning Experience.
- Users with Accessibility mode turned on must switch to Salesforce Classic to use the Report Builder to create and edit reports.

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

SEE ALSO:

Productivity Features: What's Not in Lightning Experience

Files and Content: What's Not in Lightning Experience

Sales Features: What's Not in Lightning Experience

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

Sales Features

Social Accounts, Contacts, and Leads

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

Sales Path for Opportunities and Leads

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

Features Not Available in Lightning Experience

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

Accounts

Person Accounts (Beta)

- Person accounts aren't accessible from Setup. Switch to Salesforce Classic to set up and configure person accounts.
- Person accounts are included in all account and contact lookup results even when not applicable. For example, the account lookup field on a contact record includes person accounts even though person accounts can't be a contact's account.
- When hovering over a person account link, the quick view display differs based on where the person account link is. If the link is in the field that represents the contact (for example `Name` or `Contact`), then contact information is displayed. If the link is in the field that represents an account (for example `Related To` or `Account`), then person account information is displayed.
- The quick actions for business accounts are included on person account page layouts even though not all business account quick actions are valid for person accounts. For example, person account page layouts include the New Contact quick action even though contacts can't be associated with person accounts in this way.
- When person accounts are included in contact list views, row-level actions for accounts are displayed for person account records and row-level actions for contacts are displayed for contact records. Depending on how your org's sharing and visibility settings are configured, users might see different actions for person accounts and contacts in their contact list views.
- In some lookup fields, account or contact icons are shown instead of the person account icon.
- Communities created from a Community Builder–based template don't always properly link users to person account records. Specifically, when a user clicks a person account from a contact lookup field, they're redirected to a person contact record instead of a person account record.
- In contact lookup fields, person accounts don't appear in the list of most recent records. Person accounts do appear in lookup fields when they are searched. However, you must enter the full value of the person account's first name. Partial searches and wildcards aren't supported.
- When creating a case for a person account and users add the person account to either the `Contact Name` or `Account Name` field, the other field doesn't auto-populate with the person account until the case is saved.

- When creating an email from a person account record, the `To` field doesn't auto-populate with the person account's email address the way it does when creating an email from a contact record.
- When using a template to compose an email from a business account, the template could include person account merge fields, which prevents the email from being sent. Similarly, when using a template to compose an email from a person account, the template could include business account merge fields, which prevents the email from being sent.
- If using merge fields in an email to a person account, the contact merge fields don't show up in the merge field search results. Instead, contact merge fields must be entered manually.

Contacts Related List on Accounts

- When a contact is created from the Contacts related list on an account, the contact's mailing address isn't populated with the account's billing address.
- For Group Edition users, the Contacts related list doesn't display on accounts.

Features Not Available in Lightning Experience

- Account Hierarchy
- Account History
- Account Merge
- Account Partners
- Account Teams
- Account Territories
- Contact Roles on Accounts

Campaigns

Features Not Available in Lightning Experience

- Campaign results across hierarchies
- Campaign Influence
- Cloning campaign members
- Adding multiple campaign members from list views

Contacts

Opportunities Related List on Contacts

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

Features Not Available in Lightning Experience

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

Leads

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

Features Not Available in Lightning Experience

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

Opportunities

Opportunity Teams

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

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

Switch back to Salesforce Classic to:

- Access setup pages for Opportunity Teams.
- Change the team member display order.
- Work with default opportunity teams.
- Mass assign or re-assign opportunity team members.
- Display access levels for all team members or delete all team members with a single button.
- Add multiple opportunity team members on a single page.

Opportunity Products

- Users can add only one product to opportunities or price books at a time in Lightning Experience. It's not yet possible to select multiple products from a list.
- When adding a product that has default schedules to an opportunity in Lightning Experience (or Salesforce1), Salesforce doesn't create the schedules.
- Opportunities with products can't be cloned.

Opportunity Kanban

- The Kanban is not available from the Recently Viewed list view. Users must select another list view before they can switch to the Kanban.
- The Kanban shows the opportunities for only 1 sales path at a time. If your organization uses multiple sales paths, create a separate list view for each and filter it by record type. Make the new list views public so your users can access them.
- The Kanban doesn't let users specify a reason when they change an opportunity's stage to Closed Lost. If your organization requires users to include a reason, they can still move opportunities to Closed Lost from the Kanban; however, when they switch back to Salesforce Classic, they'll be prompted for a reason.
- Users receive alerts on opportunities with overdue tasks, no open activities, or no activity in the last 30 days. The alert isn't customizable.
- Validation rules still apply when changing the stage of an opportunity using the Kanban view, but users must navigate to the opportunity workspace to address any validation rules.
- Dependent picklist fields are ignored when using the Kanban view. Users must navigate to the opportunity workspace to address any dependent fields.

Contact Roles on Opportunities

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

Features Not Available in Lightning Experience

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

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

Products and Price Books

Products and Price Books

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

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

- For organizations already activated, the Add to Price Book page doesn't include the `Use Standard Price` option by default. To make `Use Standard Price` available, add it to your Price Book Entry page layouts.
- For organizations already activated, the Price Books home page doesn't include an `All Price Books` list view by default. We recommend creating this list view to give your users access to price book records.

Features Not Available in Lightning Experience

- Archiving products and price books

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

- Product revenue and quantity schedules

Territory Management and Enterprise Territory Management

Territory Management

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

Enterprise Territory Management

Enterprise Territory Management is available in Salesforce Classic only.

Productivity Features: What's Not in Lightning Experience

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

Home

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

Home Features Not Available in Lightning Experience

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

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

Customization Not Supported

Lightning Experience doesn't support:

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

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

Global Actions Menu

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

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

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

Differences in Lightning Experience Compared to Salesforce Classic

Activity Timeline and Activities Related Lists

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

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

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

Configuration of Tabs in Activity Composer

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

Customization of Display and Order of Fields in Activity Timeline

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

Customization of Display and Order of Fields in Task List

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

No Customization Support for Activity Timeline Icons

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

Overdue Tasks

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

Task Assignment Notifications

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

Follow-Up Activities

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

Calendar Views

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

The week and day views of the calendar display up to 150 items, including Salesforce events and opportunity close dates.

Features Not Available in Lightning Experience

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

- Lightning Experience has no print view for the calendar.

Notes

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

Integrated Email

Supported Objects

Integrated Email is 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 does not offer Contact merge fields. From records for those objects, you can send email to contacts, leads, and users maintained in Salesforce, as well as to any valid external email address.

Fields available for templates are based on the object from which the template is created, plus user fields. For example, if you have an opportunity record open and create a template, you can add only Opportunity and User fields to your template. Similarly, email templates created for one object are not available for use from other objects. For example, templates created for use with the Lead object are not available for emails sent from opportunity records.

Mass Email

Mass Email is not supported.

Mass Mail Merge

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

Hyperlink Fields in Mail Merge

Hyperlink formula fields are not supported as merge fields.

Email Activity

After you send an email, a task record is created to track the action and store email content. If you sent the email to a contact or lead, the task link is added to the Recent Activity feed for that record. If the recipient is not a contact or lead, a link to the email is added to the Recent Activity feed of the record that was open when you sent the email. The task record doesn't include a link to access attachments sent with the email.

Email Templates

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

Email templates created in Salesforce Classic (text, HTML with letterhead, and Visualforce) can't be used in Lightning Experience and vice versa.

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

Email Attachments

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

Work.com

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

Customer Service Features: What's Not in Lightning Experience

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

Cases

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

Case Layout

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

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

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

Close Case Layout

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

Case Comments

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

Case Related Lists

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

Case Setup

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

Case Assignment Rules

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

Features Not Available in Lightning Experience

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

Unsupported Service Cloud Features

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

Note: Assets aren't available in the Object Manager, and can't be added to custom navigation menus. You can access the assets object home from the App Launcher and individual asset records from the object home, search, and related lists.

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

Reports and Dashboards: What's Not in Lightning Experience

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

Reports

Features Available with Limitations in Lightning Experience

Feature	Notes about Lightning Experience Availability
Object Support for Reporting	Even though Lightning Experience doesn't support all of the standard Salesforce objects yet, the Report Builder in Lightning Experience does. Users can create and view reports for all standard objects. Reports related to objects not yet supported in Lightning Experience open directly in the new interface and behave like any other report.
Historical Trend Reporting	Historical trend reporting with charts is supported in Lightning Experience, but tabular views of historical trend reports aren't available.
Filters	These filters are available when building or editing a report, but are not shown in the filter panel when viewing a report. Even though the filters are not shown, they still filter the report. • Row limit filters • Cross filters • Historical field filters • Standard filters (except for scope and date filters)

Features Not Available in Lightning Experience

Feature	Notes about Lightning Experience Availability
Joined Reports	
Schedule Report Refreshes	Users can't schedule report refreshes in Lightning Experience, but scheduled report refreshes from Salesforce Classic continue to work in Lightning Experience.

Feature	Notes about Lightning Experience Availability
Print Reports	Lightning Experience doesn't offer a print option, but users can still print reports using their browser's **print** function.
Export Reports	
Subscribe to Reports	
Role Hierarchy on Reports	
Chatter Feed on Reports	
Add to Campaign	
Accessibility Mode for the Report Builder	Users with Accessibility Mode turned on must switch toSalesforce Classic to create and edit reports.

Dashboards

Considerations When Using Dashboards in Lightning Experience

- After saving a dashboard in Lightning Experience, you can't edit it in Salesforce Classic. Instead of editing a Salesforce Classic dashboard in Lightning Experience, consider cloning the dashboard and editing the clone. That way, you can still edit the original dashboard in Salesforce Classic.
- When you drill into a report from a filtered dashboard in Lightning Experience, the report isn't filtered. When you drill into a report from a filtered dashboard in Salesforce Classic, the report is filtered in the same way as the dashboard.

Features Not Available in Lightning Experience

Feature	Notes about Lightning Experience Availability
Create, Edit, or Delete Filtered Dashboards	Lightning Experience users can view filtered dashboards. Filtered dashboards always open with no filters applied. It's possible to apply or clear filters that were added in Salesforce Classic. Switch to Salesforce Classic to create, edit, or delete filtered dashboards, or to add, change, or remove dashboard filters.
Create, Edit, or Delete Dynamic Dashboards	Users can view dynamic dashboards, but must switch to Salesforce Classic to create, edit, or delete them.
Schedule Dashboard Refreshes	Users can't schedule dashboard refreshes in Lightning Experience, but scheduled dashboard refreshes from Salesforce Classic continue to work in Lightning Experience.
Chatter Feed on Dashboards	
Post a Dashboard Component to Chatter	
Visualforce Components on Dashboards	
Accessibility Mode for the Dashboard Editor	Users with accessibility mode turned on can still create and edit Lightning Experience dashboards, but for a fully accessible experience they must switch to Salesforce Classic.

Folders

Features Not Available in Lightning Experience

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

Charts

Considerations When Using Charts in Lightning Experience

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

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

Features Not Available in Lightning Experience

Feature	Notes about Lightning Experience Availability
Scatter Charts	Scatter charts from Salesforce Classic display as Bar Charts in Lightning Experience.
Pie Charts	Pie charts from Salesforce Classic display as donut charts in Lightning Experience.
Cumulative Line Charts	Cumulative line charts from Salesforce Classic display as Line Charts which aren't cumulative in Lightning Experience.

Files and Content: What's Not in Lightning Experience

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

Salesforce Files

- Sharing files with libraries isn't possible in Lightning Experience, but files in libraries are listed in Files home in Lightning Experience and when selecting a Salesforce file to attach to a feed post.
- Files and attachments are two different types of objects, and always have been. Unlike files, attachments are associated only with a particular record and can't be shared further. In Lightning Experience, uploads to the Notes & Attachments related list are files. In Salesforce Classic prior to Spring '16, uploads to this related list were always attachments instead of files. For existing orgs, this means that the Notes & Attachments list can contain a mix of attachments that were uploaded in Salesforce Classic and files added in Lightning Experience.

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

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

File Syncing

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

Salesforce CRM Content

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

Documents

Documents isn't available in Lightning Experience.

Files Connect

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

Chatter: What's Not in Lightning Experience

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

Feeds

Chatter Publisher

Users can compose these post types in Lightning Experience:

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

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

Sharing Posts

Users can't share posts with groups or followers.

Editing Posts and Comments

Users can't edit posts or comments.

Rich Text Editor

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

Filter and Sort Feeds

Users can't use filters to condense the number of posts that appear in feeds. Nor can they sort feeds by most recent posts or recent comments.

Approvals in Chatter

Lightning Experience users can't see approval requests in Chatter or in the activity timeline on records. To see the complete list of requests that are waiting for a user's approval, the user must switch to Salesforce Classic (or use the Salesforce1 mobile app).

Chatter Topics

Chatter Topics aren't available.

Chatter Questions

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

Emoticons

Emoticons aren't available.

Highlighted Search Results

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

Global Search Result Filters

Users can't filter global search results by feed.

Chatter Messages

Chatter Messages aren't available.

People and Profiles

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

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

Groups

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

- View group recommendations on the group list view pages.
- Add records to groups using the Add Record action in customer groups, even if you or another administrator included the action in the group publisher.
- Use the Invite People option to invite customers to join groups using their email addresses. Instead, you need to create users in your org for these customers, then use the Add Member action to add them to the group.
- View the group email address or the Post by email link.

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

Other Salesforce Products: What's Not in Lightning Experience

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

- Salesforce Communities

  Note: Communities use the Lightning Experience login experience. Additionally, Salesforce Communities setup pages are available in Lightning Experience.
- Community Builder
- Pardot
- RelateIQ

Navigation and Actions: What's Not in Lightning Experience

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

Navigation

Lightning Experience Navigation Menu Replaces the Tab Bar

The concept of tabs that represent objects doesn't exist in Lightning Experience. The new interface updates the old Salesforce Classic tab bar with a collapsible navigation menu that's located along the left side of the page.

The default navigation menu provides access to the standard Salesforce objects that are available in Lightning Experience, as well as Home, Chatter items (the main feed, people, and groups), files, dashboards, reports, and the user's task list and calendar.

Apps and Custom Objects Available from the App Launcher

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

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

Custom Lightning Experience Navigation Menus Support Most Apps and Objects

You can create custom Lightning Experience navigation menus and assign them to user profiles, giving different types of users a navigation menu that's tailored to their business needs. With some exceptions, you can include many of the apps, objects, and other tabs (including Visualforce tabs and Lightning Component tabs) that appear in the Lightning Experience App Launcher.

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

In this release, you can't include these items in custom Lightning Experience navigation menus:

- Connected apps, such as Gmail™, Microsoft Office 365™, and other apps from Salesforce ISVs
- Lightning Page tabs

Users can continue to access these items from the App Launcher.

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

Open Links in New Browser Windows or Tabs

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

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

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

Actions and Buttons

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

- Deep Clone
- Mass Delete
- Mass actions on object home pages and list views, including modifying or deleting multiple items in a list at once, sending mass email, or adding multiple records to a campaign
- Sharing buttons (except for Salesforce Files, which includes file sharing options on Files home, file detail pages, and in the file preview player)
- Custom buttons with a content source of OnClick JavaScript

SEE ALSO:

What's the Fate of Existing Salesforce Customizations?

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

Search: What's Not in Lightning Experience

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

Searchable Objects

Only the following objects can be found in search results: accounts, assets, attachments, campaigns, cases, Chatter feed, Chatter groups, contacts, custom objects, dashboards, documents, files, leads, notes, opportunities, people, person accounts, price books, products, reports, work orders, and work order line item. Task and event items aren't searchable.

Search Results Can't Be Filtered

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

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

Top Results Instead of Search All

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

No Sidebar or Advanced Search

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

No Pinning on the Search Scope Bar

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

External Object Search Results Limited to 25 Items

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

Applications Doesn't Support Wildcard Searches

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

Currency Values in Search Results Aren't Formatted

For example, $1,000.00 appears as USD1000.

Dependent Lookup Filters Not Supported

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

Search Results Used for Global and Lookup Dialog Search Layouts

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

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

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

Org Setup: What's Not in Lightning Experience

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

Setup Pages

In most cases, Setup in Lightning Experience is limited to:

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

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

Advanced Currency Management

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

Language Support

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

SEE ALSO:

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

Programmatic Customization: What's Not in Lightning Experience

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

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

Data Import
Data.com

Data Import

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

- Accounts & Contacts
- Leads
- Solutions
- Custom Objects

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

Data.com

Data.com Prospector

Lightning Experience users can only prospect for:

- Contacts at accounts that are already in Salesforce
- Companies within the same corporate hierarchy as an account that's already in Salesforce

Data.com Clean

In Lightning Experience, customers can only review the `Clean Status` field for a record, review the status of the `Company Info for Leads` clean rule, and find out well the `Company Info for Leads` clean rule is working.

Data.com Social Key

This feature isn't available in Lightning Experience.

Process Automation: What's Not in Lightning Experience

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

Approval Requests

- Users can see approval requests from either their notifications or through the Approval History related list on the record that needs to be approved.
- Lightning Experience users can't see approval requests in Chatter or in the activity timeline on records.
- To see the complete list of requests that are waiting for a user's approval, the user must switch to Salesforce Classic (or use the Salesforce1 mobile app).

Flow Distribution

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

Paused Flow Interviews

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

Security: What's Not in Lightning Experience

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

Sharing Settings

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

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

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

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

Session Security Levels

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

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

Session Privilege Levels

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

Transaction Security

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

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

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

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

Custom Branding
: It's not possible to apply custom branding, including custom logos or colors, to the new interface.

Custom JavaScript Buttons

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

Custom Help

- You can't define custom field-level help text or add field-level help for fields in custom objects.
- You can't customize items in the help menus on Lightning Experience pages. However, if you created custom help for "Help for this Page" links in Salesforce Classic, these links continue to display your help when classic pages are embedded in the new user interface, such as in the Setup tree.

Object-Specific Customizations

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

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

Standard Fields

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

Page Layouts

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

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

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

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

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

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

Triggers

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

Triggers for some standard objects don't appear in the Object Manager—see Object Customizations That Aren't in the Object Manager. Access these triggers directly from the Setup Quick Find box.

Field Sets

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

Apex Sharing Rules

Not available in Lightning Experience.

Apex Sharing Recalculations

Not available in Lightning Experience.

Object Customizations That Aren't in the Object Manager

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

Triggers

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

Layouts

- Feed Item Layouts
- Group Layouts
- Publisher Layouts

SEE ALSO:

Navigation and Actions: What's Not in Lightning Experience

What's the Fate of Existing Salesforce Customizations?

Programmatic Customization: What's Not in Lightning Experience

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

Lightning Pages

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

Visualforce

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

Visualforce Is Wrapped in an iframe in Lightning Experience

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

`sforce.one` No Longer Used Just for Salesforce1

The `sforce.one` JavaScript utility object used to be available only on Visualforce pages when they ran in Salesforce1. If your organization enables Lightning Experience, it's also added to pages when they run in Lightning Experience.

In the past detecting the presence of `sforce.one` was a way to tell what user experience context your code was running in. If your org enables Lightning Experience, this stops being a reliable method for doing that. Beginning in Spring '16 there are better, supported methods for determining the user experience context.

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

You Can't Set `window.location`

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

Object List Action Override Isn't Accessible

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

Lightning Experience App User Interface Is Always Visible

When running in Lightning Experience, Visualforce pages ignore the `<apex:page>` `showHeader` and `showSidebar` attributes. You can't suppress the Lightning Experience header and navigation menu.

Page Title Can't Be Set

The `<apex:page>` `title` attribute has no effect.

Home Doesn't Support Visualforce

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

Session Privilege Levels

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

S-Controls

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

SEE ALSO:

What's the Fate of Existing Salesforce Customizations?

Apps and Packaging: What's Not in Lightning Experience

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

AppExchange

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

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

Packaging

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

These packaging features aren't supported in Lightning Experience:

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

ISVforce Apps

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

These ISVforce features aren't supported in Lightning Experience:

- Channel Order App
- Trialforce
- Usage Metrics Visualization App

What to Expect in Lightning Experience When Chatter Is Turned Off

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

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

- Feeds and groups aren't available.
- User profiles are still available, but feeds and groups aren't available on profiles.
- The Collaboration tab isn't available on records.
- Users can't follow records or other users.

EDITIONS

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

Lightning Experience Info Center

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

EDITIONS

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

Get Started Using Lightning Experience

Videos

- Lightning Experience: Let's Take it for a Spin
- Lightning Experience Video Series

Help

- Find Your Way Around Lightning Experience

Trailhead

- Sales Rep Trail—Using Lightning Experience

Evaluate and Roll Out Lightning Experience for Your Org

Help

- What Makes Lightning Experience So Special?
- Is Lightning Experience Right for Your Salesforce Org?
- Transition to Lightning Experience: Let's Do This!
- Lightning Experience Considerations

Trailhead

- Admin Trail—Starting with Lightning Experience
- Admin Trail—Migrating to Lightning Experience
- Lightning Experience Enablement Pack (Zip file)

Guides

- Evaluate and Roll Out Lightning Experience for Your Org

Release Notes

- Lightning Experience Features in Spring '16

Develop for Lightning Experience

Trailhead

Developer Trail—Lightning Experience

Lightning Experience Development Overview (Trailhead module)

Visualforce & Lightning Experience (Trailhead module)

Lightning Components (Trailhead module)

Lightning Design System (Trailhead module)

Walk Through Lightning Experience

Check Out Your Home in Lightning Experience: Walkthrough

Use Home to manage important tasks and details relevant to your day.

Walk through it: Check Out Your Home in Lightning Experience: Walkthrough

EDITIONS

Available in All Editions

Set Up a Sales Path in Lightning Experience: Walkthrough

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

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

EDITIONS

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

USER PERMISSIONS

To enable Sales Path:

- "Customize Application"

To set up a sales path:

- "View Setup" and "Modify All Data"

Create a List View for Opportunities in Lightning Experience: Walkthrough

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

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

EDITIONS

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

USER PERMISSIONS

To create a list view for opportunities:

- "Read" on opportunities

Check Out Setup in Lightning Experience: Walkthrough

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

Walk through it: Check Out Setup in Lightning Experience

EDITIONS

Available in All Editions

USER PERMISSIONS

To use Setup:

- "Customize Application"

Access and Edit Objects with the Object Manager: Walkthrough

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

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

EDITIONS

Available in All Editions

USER PERMISSIONS

To access and edit objects in the Object Manager:

- "Customize Application"

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

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

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

EDITIONS

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

USER PERMISSIONS

To create a permission set:
- "Customize Application," "View Setup and Configuration," and "Manage Profiles and Permission Sets"

To add permission to a permission set:
- "View Setup and Configuration" and "Manage Profiles and Permission Sets"

To assign a permission set:
- "Assign Permission Sets"

Import Accounts and Contacts with the Data Import Wizard: Walkthrough

In this walkthrough, we'll show you how to import accounts and contacts using the Data Import Wizard.

Walk through it: Import Accounts and Contacts with the Data Import Wizard

EDITIONS

Available in All Editions

USER PERMISSIONS

To import accounts and contacts:
- "Import Personal Contacts"