

What is Salesforce Lightning, and Why Should You Care?

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What is Salesforce Lightning, and Why Should You Care?

Simply put, Salesforce Lightning is the newest and greatest version of the standard Salesforce platform. Salesforce Lightning functions like the Salesforce platform that you're used to, but one might call it a modernized evolution of the Salesforce platform.

Salesforce Lightning is not a direct replacement for the Salesforce platform you already know, which is now being referred to as Salesforce Classic, and it doesn't require an upgrade/install/etc. Salesforce Classic and Salesforce Lightning operate on the same, reliable infrastructure, but they differ in the user experience and features. In fact, you can "switch" the lightning experience "on" or "off" in your org right now, and compare the differences using the data in your org without negative impact to your data!

So, why should you care about Salesforce Lightning, then? That's what we'll illuminate in this white paper.

You may have heard about the changes coming in the Winter '20 Critical Update relating to Salesforce Lightning. Ultimately, we hope to help you learn about what this means, and how it impacts you. There are useful, modern features available in Salesforce Lightning that you may want to review before the critical update.

Summary of Salesforce Lightning

Salesforce Lightning is a component-based framework for app development from Salesforce.com that is designed to simplify processes for business users who may not be highly tech savvy nor have development experience. On top of that, it also allows for variation and flexibility in how records are displayed and features a GUI that is optimized for performance.

In technical terms, Salesforce Lightning Design System (SLDS) is an HTML/CSS framework and component library for building lightning applications which significantly enhances development.

Don't let the word "development" fool you; it's extremely user friendly for all Salesforce users, from developers to sales managers and leaders.

We've included summaries of a few high-level features of lightning that are for everyone's benefit.

Features of Lightning

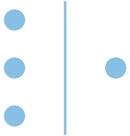
Section 1: Really Cool Features

There are many benefits of switching your Org to the lightning experience, and we've compiled this list of features that we're excited about and recommend that you test in your Org.



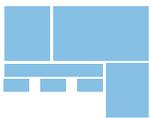
Activity Timeline

View all past tasks, activities, emails, and events in the order of when they are due. It is an amazingly helpful tool to help get sales representatives up to speed quickly. Besides, users can access 'Log a Call,' 'New Event,' and 'Email functions' options which load inside the Component.



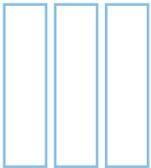
Launch a Lightning Component from an Action

Lightning component actions are custom actions that invoke a Lightning component; because they support Apex and JavaScript, Lightning component actions provide a secure way to build client-side custom functionality.



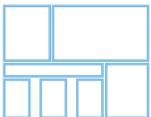
Dynamic Report Chart Components

Report chart components are now more dynamic and responsive to the size of the page upon which they display. Report chart components resize themselves horizontally to fill larger display regions, up to a maximum of 800 pixels wide. (The height is limited to 300 pixels.)



Kanban

Kanban is an alternative to the standard tabular list view. See records displayed as cards in columns. Drag records from one column to another or click to update the record. Add a summary of numbers in a column. Change how records are grouped. Filter records. For opportunities only, get a warning if the record has no pending tasks or activities.



Home Page Components

Use the Lightning App Builder to create custom Home pages that appear for different profiles in your Org. Display and organize useful components, and assign different pages to different types of users. You can even create and edit pages for leads, contacts, and other types of records! This feature is available in Lightning Experience only



Path

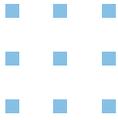
Path can be used to guide users through the pre-defined stages of a process, such as working an opportunity from a fresh lead to closing a deal. At each stage, help your team succeed with step-specific guidance and resources.



Interactive Tabs

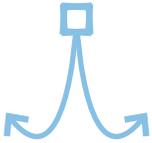
Use the Tabs component to add a set of tabs to a region of your Lightning Page. Choose from a set of standard tabs or create custom tabs to enhance record pages for your Lightning Experience users.

Section 2: Useful Features



App Launcher

All users of Lightning Experience have access to the App Launcher to navigate to Salesforce apps, custom apps, and connected apps from one view.



Assign filters to report chart components in Lightning Experience

Assign a filter to the data displayed in a Report Chart standard Lightning component when it displays on record pages in Lightning Experience. If you set a filter option for a Report Chart component on a record page, the component displays only that filtered data when users view the page.



Utility Bar

The utility bar gives your users quick access to common productivity tools, like Notes and Recent Items. It appears as a fixed footer that users can access to open utilities in docked panels.



Mass Inline Editing

Your reps can now update up to 200 records without leaving a list view.

Why Should You Move to Salesforce Lightning?

So far, we know that Salesforce's Lightning Experience is the new Salesforce, reimagined with a modern user interface, a suite of new features and tools, and even more cutting-edge advanced technology. It comes standard with enhanced customization options a

nd a host of new and innovative tools designed to help drive your organization's success.²

Salesforce will turn on Lightning Experience on a rolling basis starting in Winter '20 to empower users to work faster, accomplish more, and to improve productivity. All users are encouraged to start preparing to transition to the Lightning Experience soon so that your users can benefit from everything the new interface has to offer.

Salesforce Lightning is the future of the Salesforce user experience. Moving forward, all innovations to Salesforce will be in Lightning Experience. **Before Lightning is turned on officially, it's best to take advantage of the lead time to understand how your org's features and customizations perform in the new interface and to prepare**



your users via change management.

What is Happening With the Winter '20 Critical Update to Salesforce?

Salesforce will turn on Lightning Experience starting with the Winter '20 release for all orgs with supported editions and user licenses for Lightning Experience. *Please refer to Salesforce's documentation on the full list of Supported Editions and User Licenses.*

After the update, all users with the Lightning Experience User permission enabled can switch between Lightning Experience and Salesforce Classic. This includes all users with standard profiles as well as users with custom profiles or permission sets that have the Lightning Experience User permission enabled by an admin. Access to Salesforce Classic remains for all users unless deactivated by a system admin.

Every week, starting the Sunday after Lightning Experience is turned on, Lightning Experience enabled users working in Salesforce Classic will be automatically switched to Lightning Experience when they log in. They see a welcome mat offering resources for learning more about the new interface. You can change the frequency of the switch, exclude users from switching, or customize the welcome mat.

After users have access to Lightning Experience, Salesforce begins encouraging Salesforce Classic users to start working in the new interface with in-app prompts.³

What will Salesforce Classic be Like After Cutoff?

After the cutoff, Salesforce Classic will still be available to your users. The option to Temporarily switch back to Salesforce Classic is available to end users. If this is not desired, system administrators can hide the option to switch to Salesforce Classic from end users, which would make the Lightning Experience the only platform available to them for use.

The features available within Salesforce Classic will be the same. With the Winter '20 critical update, any system updates that are released into Salesforce will apply to the Lightning Platform exclusively. From an administrative perspective, all the components under Setup will be the same between Lightning and Classic.

How Can CoreSphere Help?

At CoreSphere, our primary goal is to make software that is intuitive, effective, and exactly what your people need, whether your people are your employees, customers, citizens, etc. We have a track record of high customer satisfaction, on-time delivery, and security-focused solutions.

1. We've done this before

We have migrated our clients to lightning, and we've developed an efficient system to really get it down pat! **Whether your Salesforce Org has custom code or not, we've got you covered.** Take the load off your IT team, and let us do it for you.

2. We can provide you with expert knowledge & training

Our Lightning migration experts can help you understand the results of Salesforce's readiness assessment and develop a roadmap for success.

- Learn More about the Assessment [Here](#)
- Earn a [Lightning Experience Badge](#) on Trailheads

3. We provide advice, guidance and best practices

We can also offer expert consulting to your internal Lightning Migration team, and we're good teaming partners, if we do say so ourselves! Whether you need backup, review, or just a good plan, we can help you with that!

**Contact Us for Expert
Lightning Migration
Assistance!**

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Sources

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