



THE CUSTOMER SUCCESS PLATFORM



# Lightning Experience Overview

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Meet the new Salesforce!

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# Objectives

- Scope of GSA's transition to Lightning
- What is Lightning?
- Introduction to Lightning Experience, the new Salesforce interface
- Introduction to Lightning Platform, the new way to customize and build apps
- Resources for more information

# Scope of GSA's transition to Lightning

# GSA's Move to Lightning

## What is Salesforce Lightning?

- Lightning is Salesforce's new, modern and customizable User Interface (UI)
- Find insights quickly, work more efficiently and build apps faster
- *More details about what Lightning is in the following slides!*

## Who is moving to Lightning?

- All GSA users
- Short-term goal: increase GSA's Lightning usage to nine percent by the end of the FY
- Long-term goal: be the first federal agency to fully transition to Lightning

## When is GSA moving to Lightning?

- The Enterprise Platform Solution Development team (ICPA) is currently determining a plan to enable Lightning for all users
- ICPA's goal is to roll Lightning out over time and ultimately have users start to choose Lightning as their default UI
- More communications will be forthcoming as we collaborate with our business stakeholders

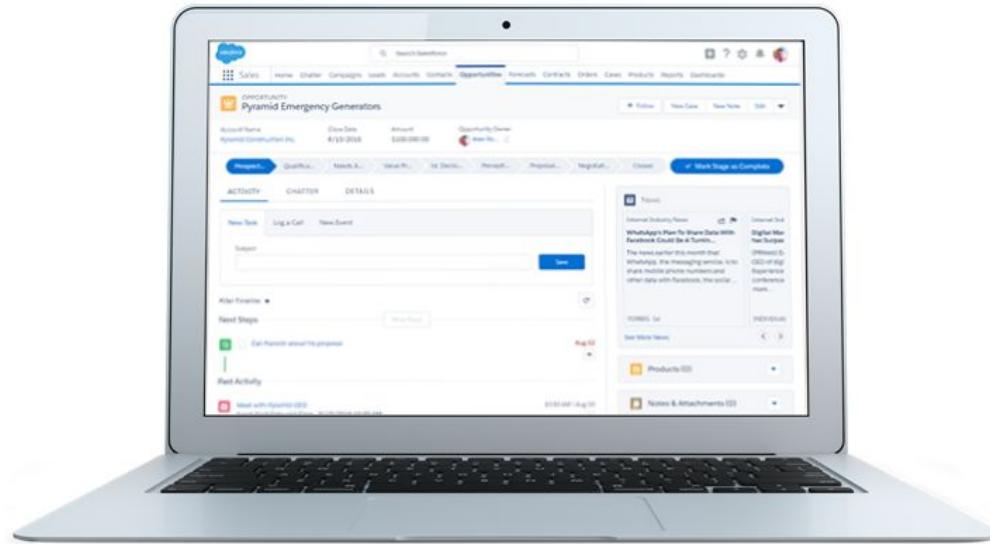
## Why is GSA moving to Lightning?

- Transition before Salesforce determines an end of life for Classic (previous UI)
- Recently announced with the Winter 20' release (Oct. 19') all users will be Lightning enabled
- All new Salesforce innovation is focused on Lightning Experience

# GSA Lightning Users Can Access Salesforce Classic

It's important to note that both UI experiences are available for GSA users to use when Lightning is enabled

Lightning Experience



Salesforce Classic



- The user experience predating Lightning Experience is Salesforce Classic.
- Users will be able to operate in both Classic and Lightning in the short-term.

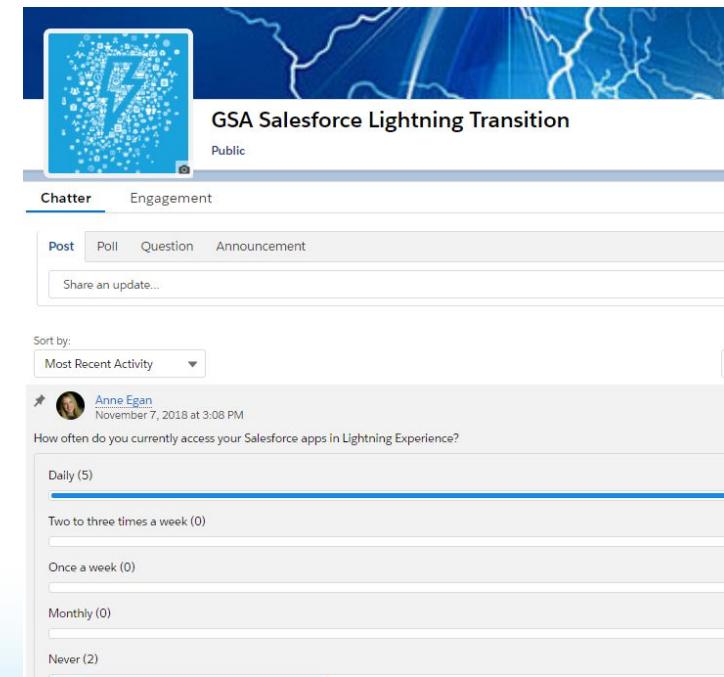
# Stay in the know about Lightning

To keep updated on our transition to Lightning be sure to join the [GSA Salesforce Lightning Transition Chatter Group.](#)

Users will also be prompted to share feedback as they switch from Lightning to Classic. This will help the ICPA team's Salesforce COE prioritize new features to make available within Lightning Experience.

## Seven GSA Salesforce Orgs

- EEO -- *Enterprise Applications (Event Tracker, Request Tracker, Project 360)*
- CEO -- *FAS CRM, GSA National Customer Service Center, PIF Hiring App*
- PEO -- *USA.gov Call Center*
- GEO -- *OGP CRM & related apps*
- PBS orgs
  - Client Solutions
  - Property Disposal
  - Workspaces



The screenshot shows a Chatter group titled "GSA Salesforce Lightning Transition" which is Public. The interface includes a header with a profile picture, the group name, and a "Share an update..." input field. Below the header, there are tabs for "Chatter" and "Engagement". A poll is displayed asking, "How often do you currently access your Salesforce apps in Lightning Experience?". The poll results are as follows:

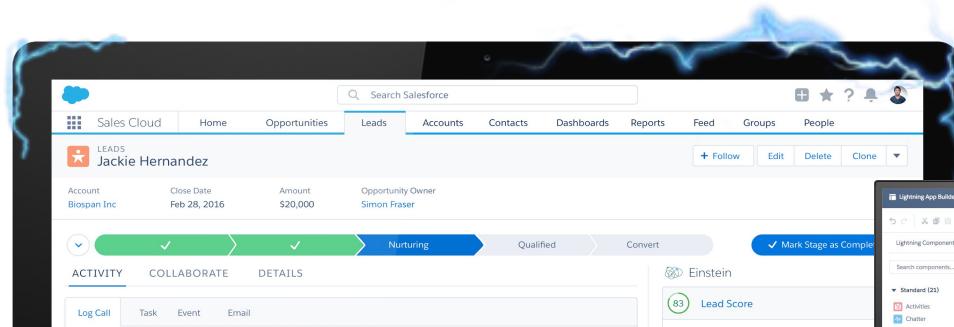
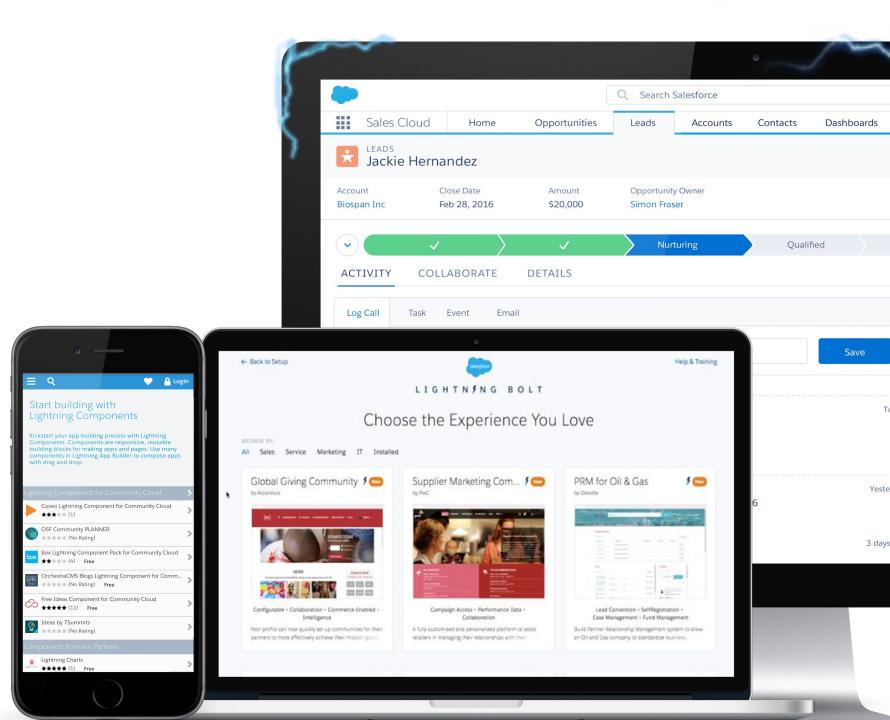
Frequency	Count
Daily (5)	5
Two to three times a week (0)	0
Once a week (0)	0
Monthly (0)	0
Never (2)	2

# What is Salesforce Lightning?

# Lightning is the Future of Salesforce

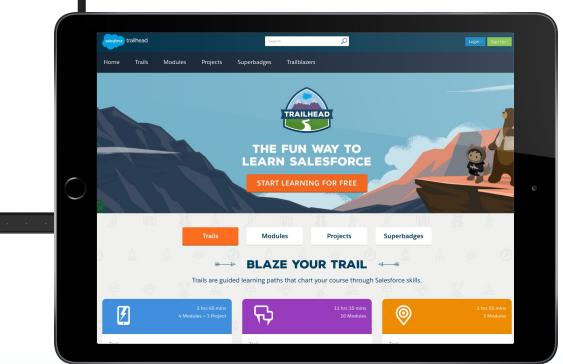
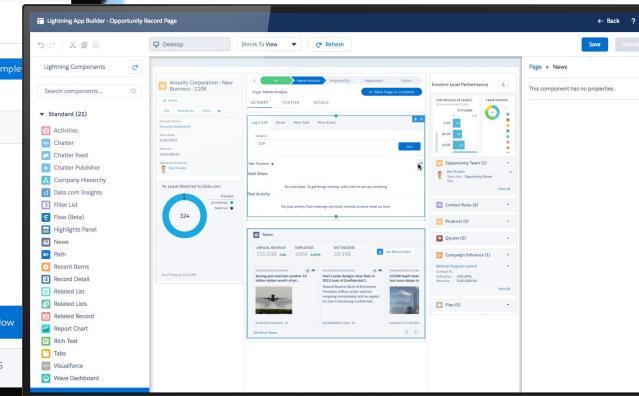
## Experience

Be more productive in every moment



## Platform

Aligned tools for customers, partners, and Salesforce



## Ecosystem

Lightning-ready apps and components on the AppExchange

# Experience: A New UI to Increase Productivity

Prioritize Top Leads

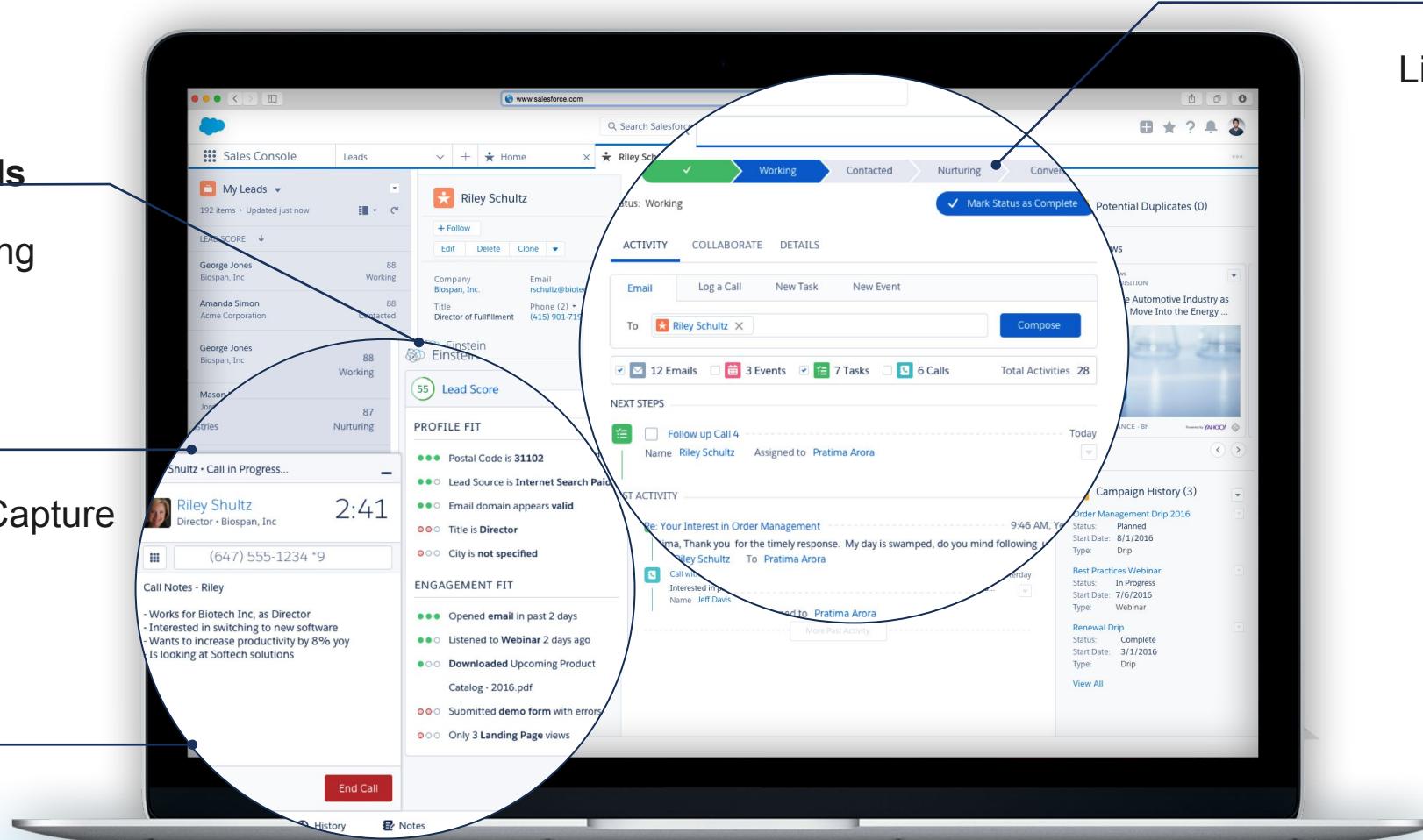
Einstein Lead Scoring

Connect Faster

Automatic Activity Capture

Work Smarter

Utility Bar



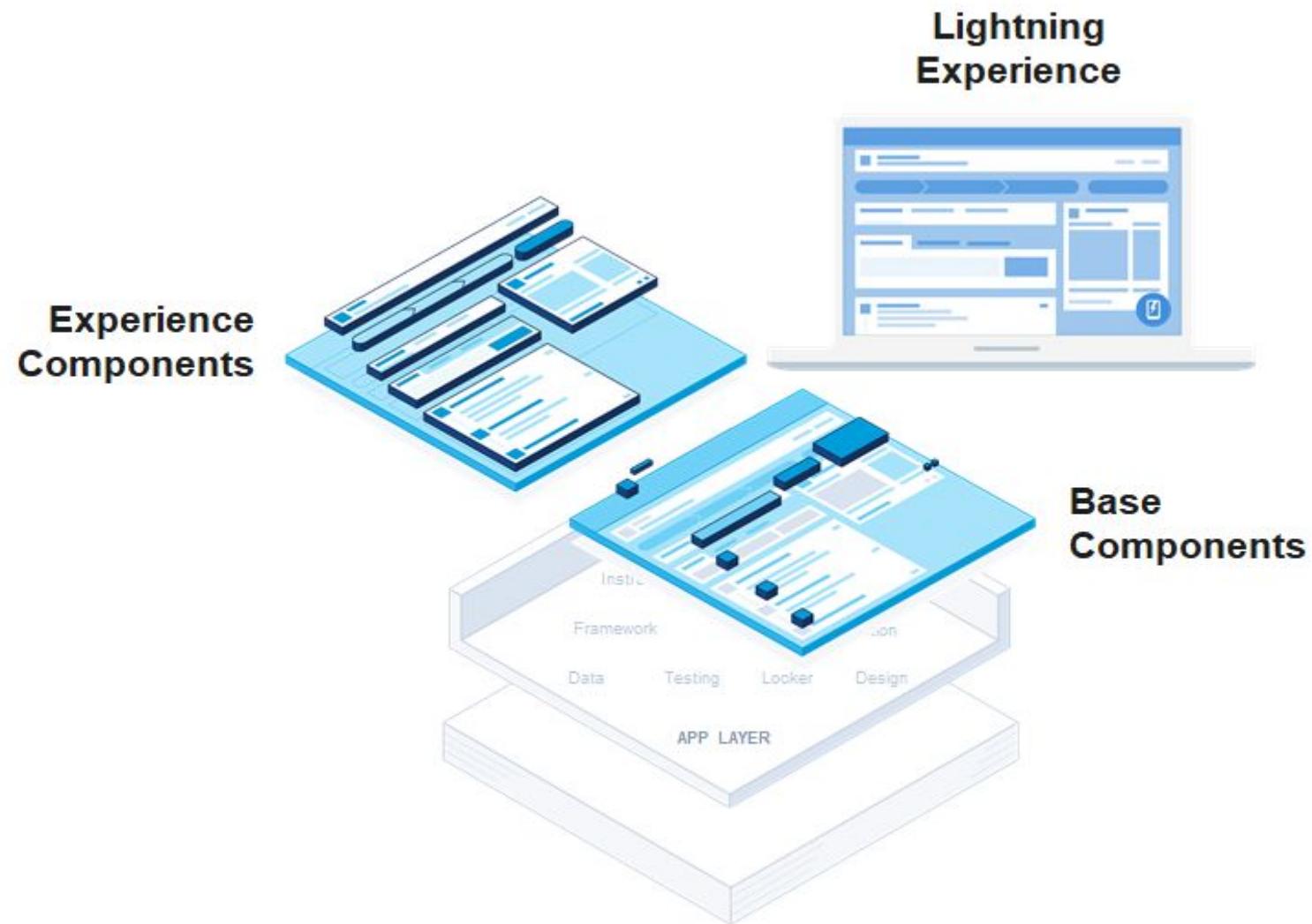
**Increase Productivity**

Lightning Sales Console

Path

Assistant

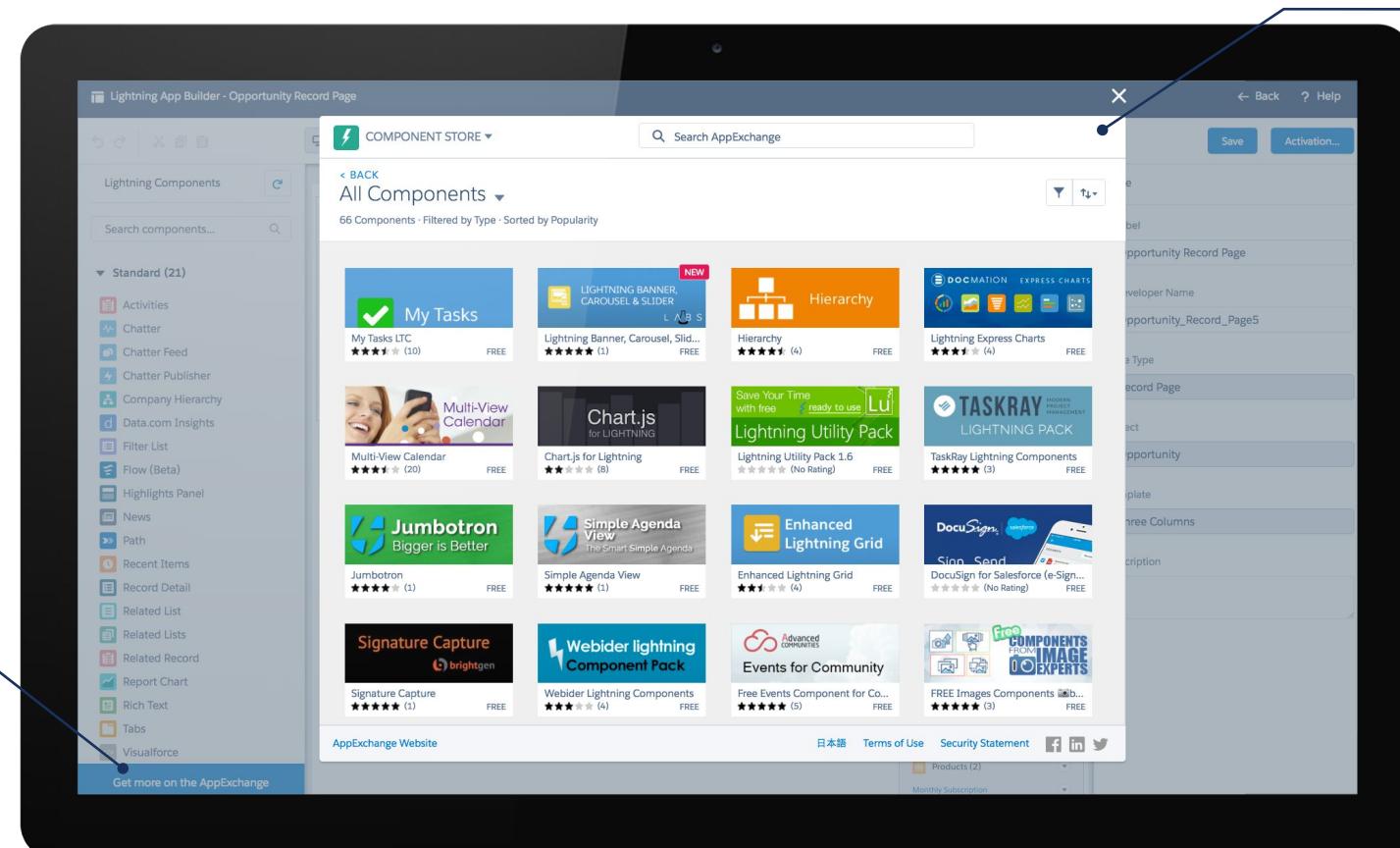
# Platform: A Better Way to Build Custom Experiences



**Build better with the  
Lightning Platform**

# Ecosystem: Lightning-Ready Components and Apps

Lightning Exchange from AppExchange, available from Lightning App Builder



**Extend Any App**

490+ Lightning-Ready Apps

60+ Lightning Components

300+ Salesforce1 Ready Apps

**Customize Faster**

App Builder

AppExchange

# Lightning Makes Everyone More Productive

A 2017 Lightning Experience survey by Salesforce found the following results from their customers

- 1 Increase win rates
- 2 Less time managing pipe
- 3 Faster reporting
- 6 Increase collaboration
- 7 Improved productivity

# Introduction to Lightning Experience

Productivity features available only in Lightning Experience

# Meet the New Salesforce!

## Maximize Your Productivity

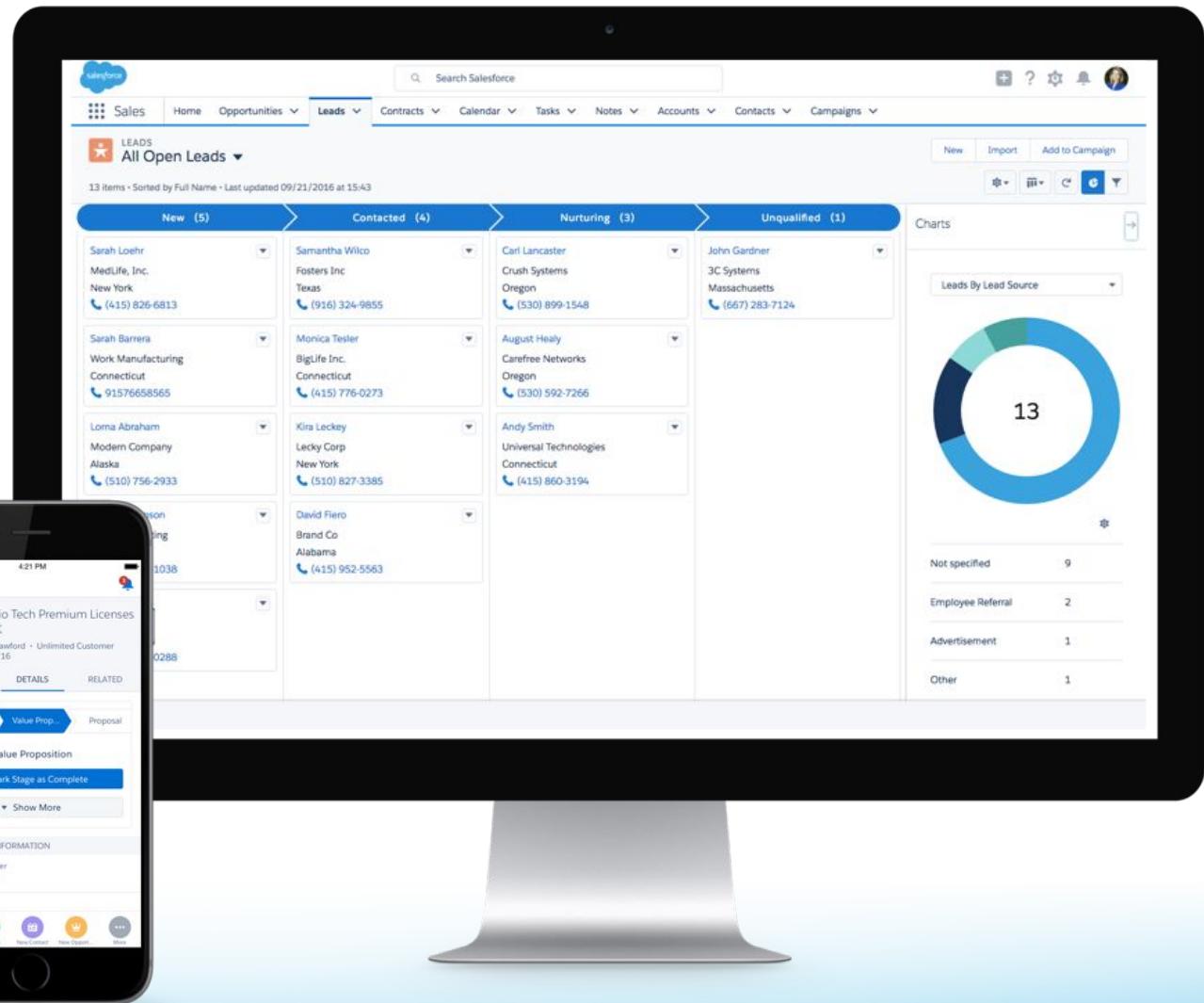
New collaboration and process tools  
boost user efficiency

## Find What You Need Faster

Work more intuitively with your data  
through enhanced search features

## Personalize Your Experience

Get a consistent user experience  
across all your devices



# 10 Lightning Experience Features for Salesforce Users

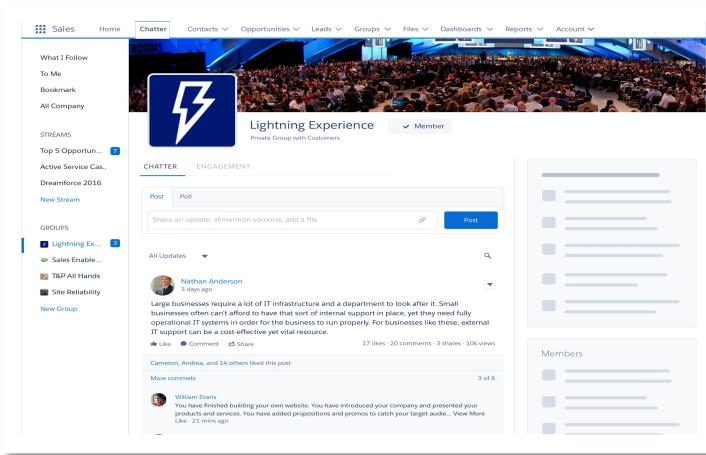
Out of the box features with little to no customization required

- 1 Chatter Feed
- 2 Navigation
- 3 Global Search
- 4 Reports
- 5 Dashboards
- 6 Calendar & Tasks
- 7 List Views
- 8 Console
- 9 Integrated Email
- 10 Lightning Record Pages

# Share Information Easily and Find What You Need Faster

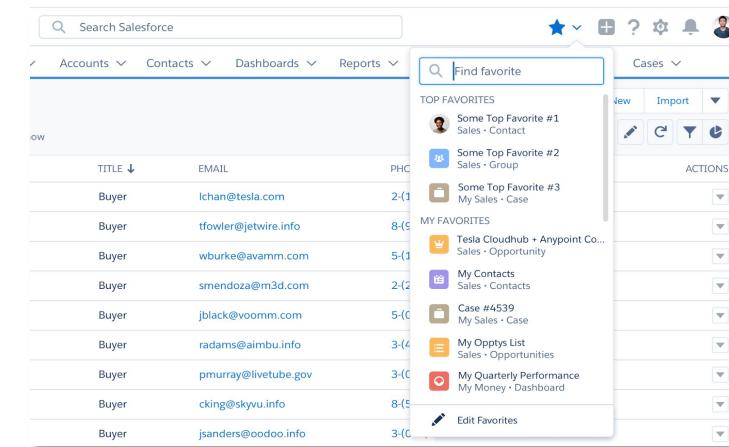
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## Chatter Feed



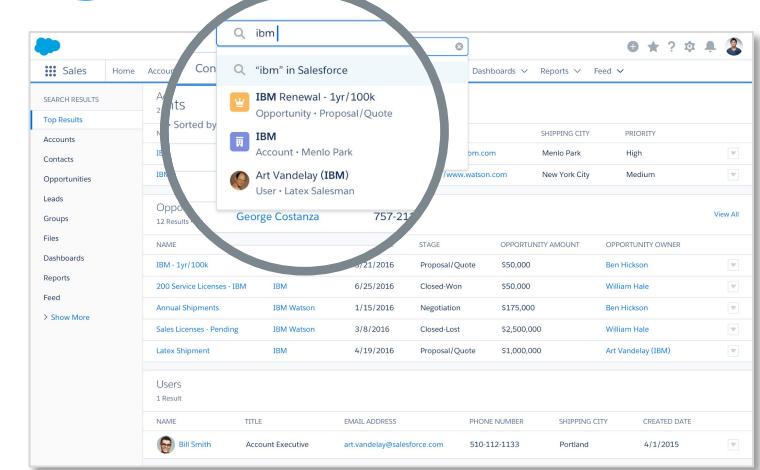
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## Navigation



3

## Global Search



**Collaborate with colleagues in real time. Work together, talk to each other, and share information.**

- Personalized Chatter streams
- Recent groups
- Share posts
- Live feed typing indicators
- Relevance ranked feed

**Quickly access important records, lists, groups, dashboards, and other frequently used pages in Salesforce**

- Favorites: bookmark records, views, opportunities and more
- Personalized Navigation: add the pages you need to the navigation bar

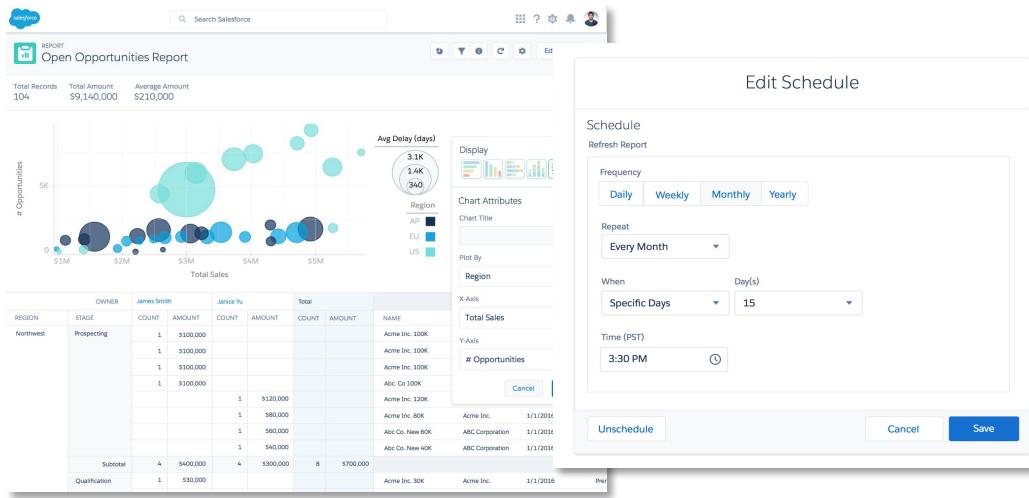
**Find things faster with enhanced Global Search**

- Scope search to get better results
- Results ranked by relevance
- Top results across frequently-used records and objects
- Instant type-ahead results
- Search for email

# Visualize Your Data with New Reports and Dashboards

4

## Reports

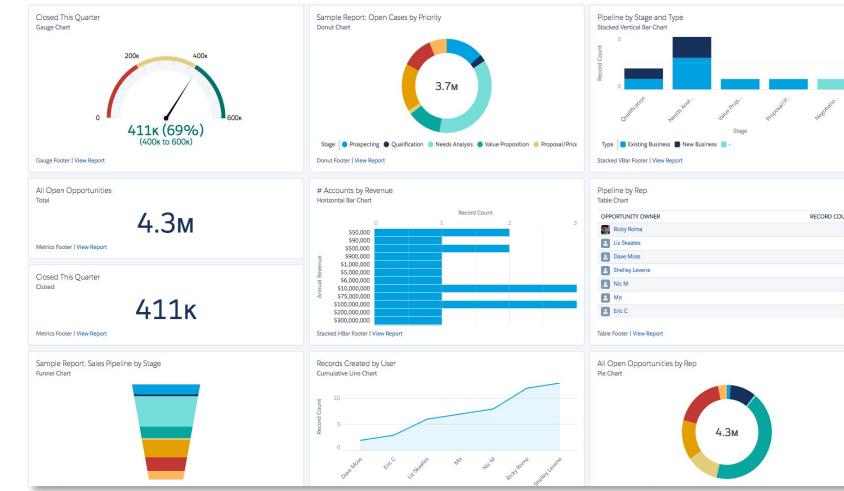


Create reports that meet the criteria you define and filter, group or display in a graphical chart

- Chatter Feed
- Enhanced charts in the Salesforce app
- Subscribe to reports
- Role hierarchy filter on reports
- Relative date filters
- Dynamic filter URL
- Lightning Report Builder

5

## Dashboards



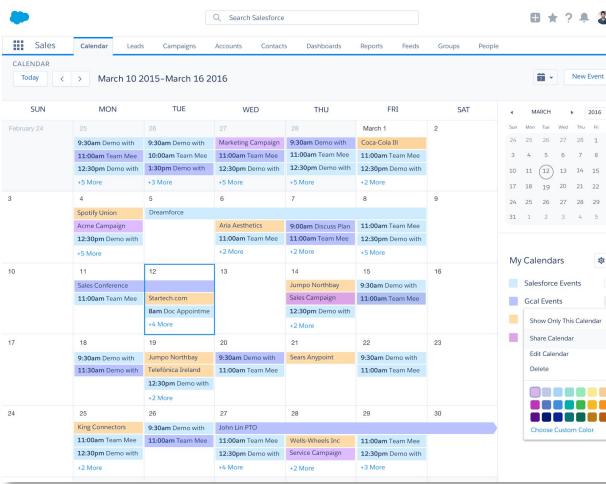
Visually display key metrics and trends for records in your org

- Tacked combo charts, pictures on table charts, conditional highlighting, improved table component
- Drill to report from filtered dashboard
- Denser charts, smaller metrics
- Post on charts and follow dashboards
- Edit running user, folder
- Subscribe to dashboards

# Visualize Your Data at a Glance and Make Edits Quickly

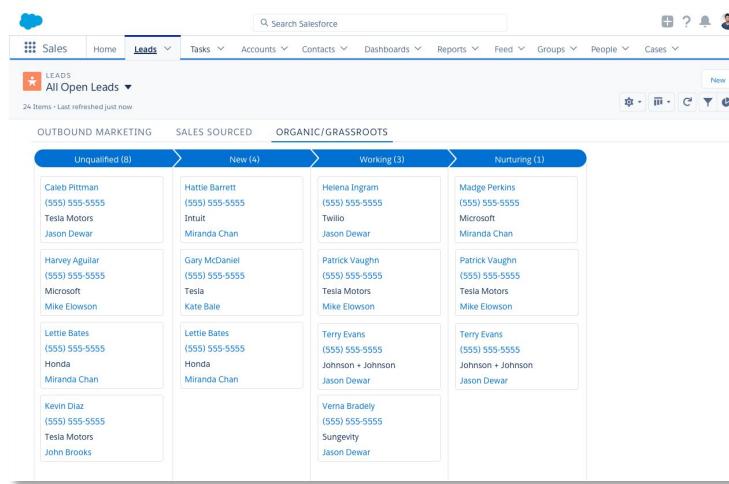
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## Calendar and Tasks



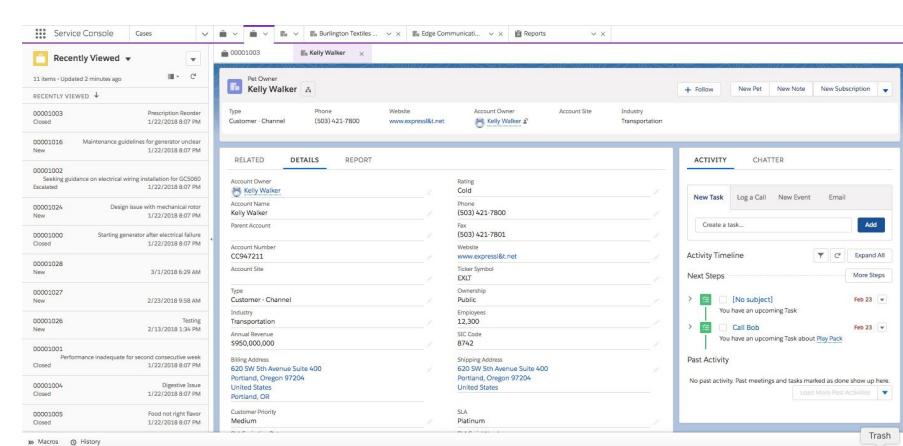
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## List Views



8

## Console



## Integrate calendaring into your process

- View Google and Outlook calendar events
- View any records with a date field on a calendar
- Recurring and follow up tasks
- Tasks and events in search

## Edit your sales information quickly and easily from lists

- Quickly modify records on a single page
- Kanban view for any object
- Wrap text within text fields
- View multiple record types
- Configurable settings for “group by” and “summarize by” fields
- List view charts

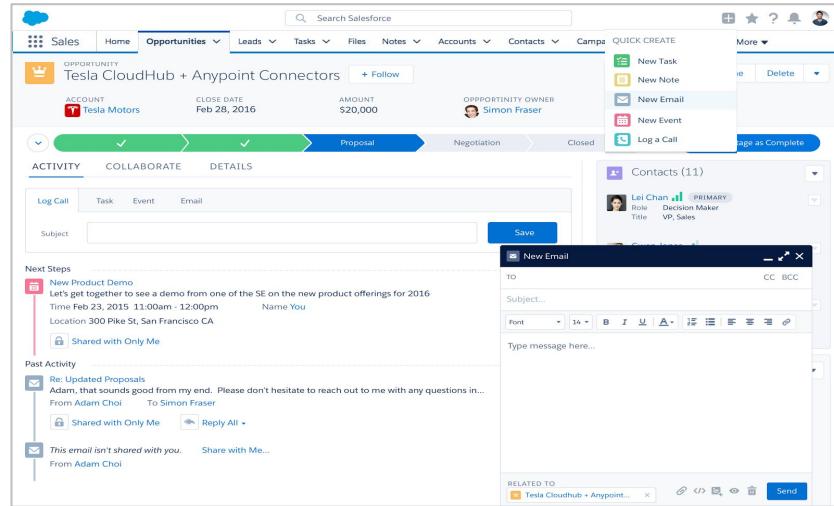
## Drive productivity while working in Salesforce

- Pre-built sales and service consoles
- Eliminates need for opening multiple browser tabs
- Related records open as sub-tabs
- View records in split view
- Tabs are “sticky”
- Pinned tabs
- Apply macros

# Increase User Productivity

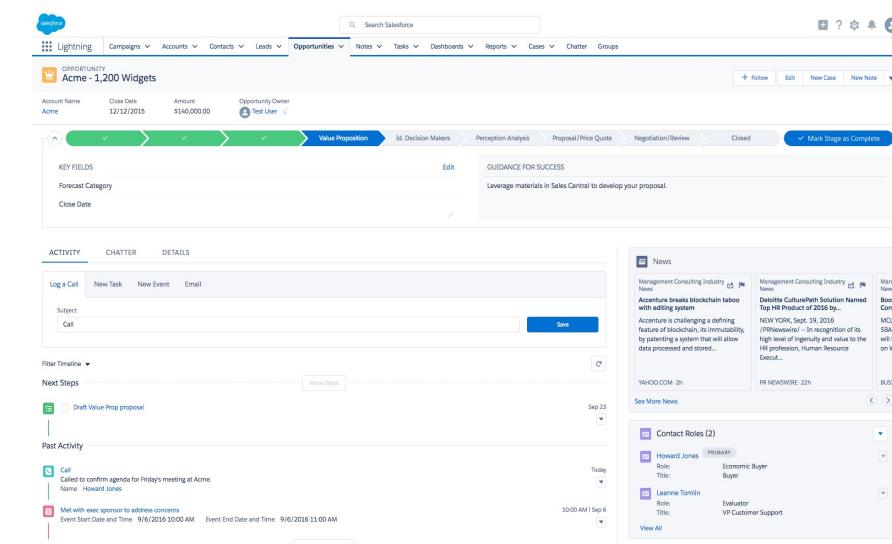
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Integrated Email



10

Lightning Record Pages



Create, view, and respond to email within Salesforce

- Send email through Gmail and link to related records
- Richer email support with new email interface
- Reply to and forward emails from Lightning
- Email Quick Action org-wide addresses
- Emails everywhere
- Enhanced email experience for Person Accounts

Find data faster and take actions quickly

- Path
- Highlights panel
- Activity timeline
- Related lists
- Related records
- Report charts

# Introduction to Lightning Platform

Build, customize, and deploy apps faster, no code required

# 5 Ways to Customize Lightning Experience

Drag-and drop tools that make customizing and building apps a breeze. These new features will allow GSA to build and implement new Salesforce applications and features faster.

- 1 Build Custom Home Pages
- 2 Bring Your Console Apps to Lightning
- 3 Path on More Objects
- 4 Customize and Assign Record Pages for Custom & Standard Objects
- 5 Build Lightning App Pages for Mobile Users

# Customize Pages and Build Apps More Easily

1

Build Custom Home Pages

The screenshot shows a highly customized Salesforce home page for the 'Cubic Sales' team. It includes a news section with links to various business news articles. A map visualization displays opportunities across the United States. Below these are two charts: a bar chart showing the number of tickets per month and a line chart showing TaskRay time for the current week. A sidebar on the right provides a summary of today's tasks and a news feed.

Create a welcoming experience for all of your users

- Create multiple home pages and assign to different profiles
- Build an org-wide default page focused on sales productivity or build individual pages that can be assigned to one or more profiles for role-specific content

2

Bring Your Console Apps to Lightning Experience

The screenshot shows the Service Desk application running in Lightning Experience. It includes a contact detail page for 'Riley Schultz', a case detail page for a router issue, and a knowledge base search for 'climbing ropes'. The interface is designed to be responsive and user-friendly, with a clean layout and integrated navigation.

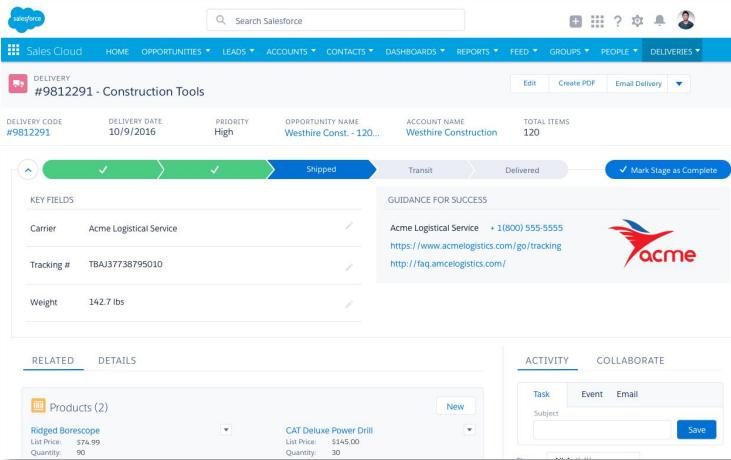
Give users access to the information they need to get their jobs done faster

- Customization
- Workspaces to edit and reference multiple records at once
- Pinned workspaces
- Sub-tabs
- Utility Bar
- Multiple out-of-the-box components

# Design a Relevant and Modern User Experience

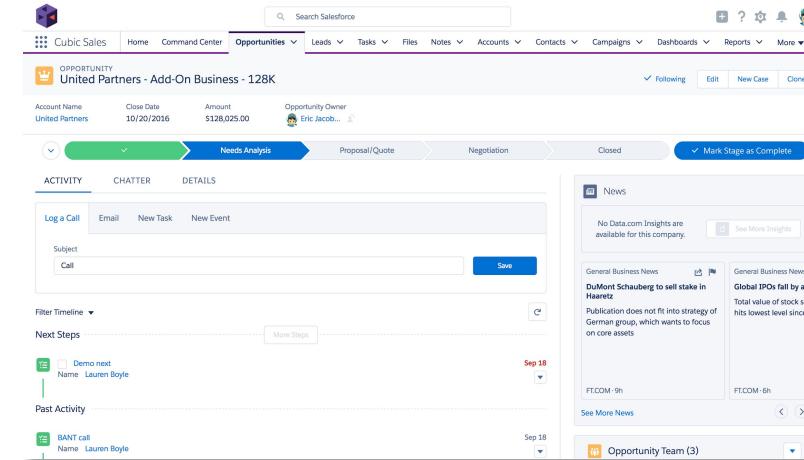
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Path on More Objects



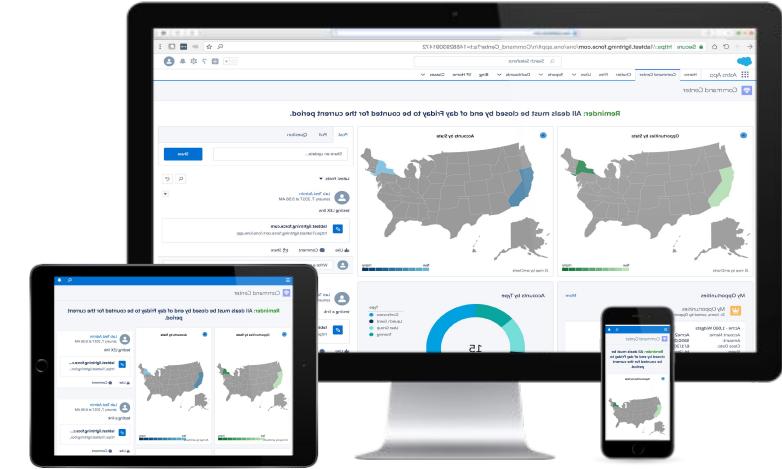
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Customize and Assign Record Pages for Custom & Standard Objects



5

Build Lightning App Pages for Mobile Users



Guide users through each stage of a process

- Path on custom objects
- Business Guidance
- Designate the field that drives the “path”

Customize the detail pages for standard and custom objects

- Assign records pages by Profile, App or org
- Existing metadata powers the experience
- Page layouts control fields, related lists, and actions
- Compact Layouts control the field in the Highlights Panel

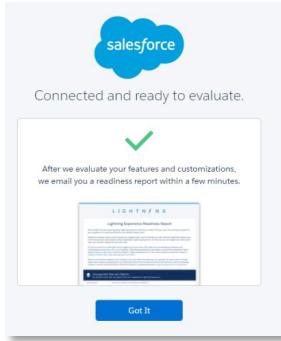
Build a new page once & deploy it to Lightning Experience and Salesforce1

- Build pages once
- Consistent experience across all devices
- Run your business from your phone

# Demo

# Resources

# Resources



## Lightning Experience Readiness Check in Setup

Evaluate your org's readiness for Lightning Experience

Determine which users are ready to work in the new interface

Develop your rollout plan



## Prepare with Trailhead

[Make the Move to Lightning Experience](#)

[Learn to Work with Lightning Experience](#)



## More Resources for Admins

[Lightning Experience Video Series](#)

[Learn Lightning Blog Series](#)

[Lightning Experience Pro Tips Series](#)



## Lightning Now! Group

[success.salesforce.com](#)

[Release Notes](#)

# THANK YOU