



salesforce

This document is for customers who have been notified in email that some of their org's custom profiles get Lightning Experience on November 14, 2019. It does not relate to the "Turn On Lightning Experience" Critical Update that auto-activates starting in January 2020.

Frequently Asked Questions

Admin

Auto-Enable Lightning-Ready
Custom Profiles Journey

10/7/2019





TABLE OF CONTENTS

p.3 **General**

What is this journey and why is my org in it?

Why is Salesforce giving some of my users access to Lightning Experience?

What's the timeline for switching these users to Lightning Experience?

p.4 What happens to my custom profile users when they get access to Lightning Experience?

How can I find out which of my users will switch?

Can users switch back to Salesforce Classic?

Can I control users' access to Salesforce Classic?

p.5 Can I unsubscribe from emails related to this program?

Can I postpone some custom profile users from moving to Lightning Experience?

Can I move some users to Lightning Experience ahead of time?

p.6 **Preparing for Lightning Experience**

Will the move to Lightning Experience be communicated to my users?

How can I prepare Lightning Experience for my users?

p.7 How can I help prepare my users prepare for Lightning Experience?

How can I find out more about Lightning Experience?

p.8 **When Lightning Experience Arrives**

How can I get my users excited about Lightning Experience?

What do I need to after my users are switched to Lightning Experience?

p.9 **Support**

What's the overall timeline for this journey?

Who should I contact if I need help or have questions?



Frequently Asked Questions

Auto-Enable Lightning-Ready Custom Profiles

GENERAL

What is this journey and why is my org in it?

To help Salesforce customers get the features and technology they're entitled to, this journey enables the Lightning Experience User permission in custom profiles that are ready for the new interface. As a result, users assigned to these profiles will get access to Lightning Experience.

Based on your org's Lightning Experience readiness data, you have some custom profiles that are ready for the new experience and they will be auto-enabled in a couple of weeks. Between now and the scheduled enablement date, you and your affected users will receive a series of in-app notifications with curated resources to prepare everyone for Lightning Experience.

At the conclusion of this journey, affected users are switched to Lightning Experience. But they can still access Salesforce Classic and can switch themselves between both interfaces as needed.

Why is Salesforce giving some of my users access to Lightning Experience?

Lightning Experience is where all Salesforce innovation is happening. It's where you can find the best features and technology. We want all users to get access to all the benefits of the new interface. Custom profiles that are ready for Lightning Experience, or very close to ready, are being given access to it now.

What's the timeline switching these users to Lightning Experience?

We'll enable the Lightning Experience User permission in selected custom profiles 15 days after you were notified that your org is included in the program. When you log in to Salesforce, a banner at the top of the page shows the countdown to the scheduled auto-enablement date.

If you feel like your custom profile users are ready to move sooner, you can enable the Lightning Experience User permission yourself.



Frequently Asked Questions

Auto-Enable Lightning-Ready Custom Profiles

What happens to my custom profile users when they get access to Lightning Experience?

Users with the selected custom profiles see Lightning Experience the next time they log into Salesforce.

How can I find out which of my users will switch?

A link to [view selected custom profiles](#) is available in this FAQ, in the emails you receive about this journey, and in the in-app announcements in Salesforce.

How will Lightning Experience benefit my users?

Lightning Experience is designed from the ground up to be a more efficient workspace for your users. Users can get more done in fewer clicks, and access new productivity-enhancing features available only in Lightning Experience.

Check out how Lightning Experience helps users do more in [Lightning Experience: Take it for a Spin](#) (video, 5 minutes).

Can I switch back to Salesforce Classic?

Yes. Salesforce Classic is still available to everyone. From Lightning Experience, users can switch to Salesforce Classic by clicking the profile icon in the upper right corner of the Lightning Experience header, then selecting the **Switch to Salesforce Classic** link.

Can I control users' access to Salesforce Classic?

Yes. You can [hide the Switcher](#) link to ensure users stay in Lightning Experience. We recommend hiding the Switcher soon after your users get access to Lightning Experience. That way, you only need to train for, and support, one user interface, and your users can share their tips and tricks with each other more easily.



Frequently Asked Questions

Auto-Enable Lightning-Ready Custom Profiles

Can I unsubscribe from emails related to this program?

Yes, but unsubscribing from email communications doesn't change your org's custom profile auto-enablement date. To stop receiving related email communications about select custom profiles being enabled for Lightning Experience, you can unsubscribe from the email journey by clicking the "leave this list" link in the email footer.

Can I postpone some custom profiles from moving to Lightning Experience?

Yes, but we've only included custom profiles that are ready for Lightning Experience. We think the users who are assigned to these profiles will benefit from the new innovations in Lightning Experience. We recommend leaving the selected profiles in this journey to help your users get all the value they're entitled to.

We strongly encourage you to work around any timing issues by rolling out Lightning Experience to your custom profile users sooner rather than later. Removing custom profiles from this journey only delays things as they will be added to a later auto-enablement journey.

If some or all of the selected custom profile users absolutely can't switch to Lightning Experience at this time, please [complete the survey](#) and select custom profiles to delay. Requests for delay must be received at least 1 day before the date your custom profile users are scheduled to get access to Lightning Experience.

Can I move some users to Lightning Experience ahead of time?

Yes. You can move users to Lightning Experience at any time by enabling the Lightning Experience User permission.



Frequently Asked Questions

Auto-Enable Lightning-Ready Custom Profiles

PREPARING FOR LIGHTNING EXPERIENCE

Will the move to Lightning Experience be communicated to my users?

Yes. Users who are assigned to the selected custom profiles will see two different in-app announcements at 14 and 7 days prior to the switchover, and a countdown banner at the top of the page when they're logged in. These announcements provide helpful resources, including basic information about Lightning Experience, links to a couple videos and Trailhead units to get users up to speed, and links to a [Auto-Enable Lightning-Ready Custom Profiles Journey FAQ](#) for users.

However, we strongly encourage you to communicate about the coming change directly to your users and provide them with additional resources specific to your Lightning Experience implementation and the features they're most likely to use.

How can I prepare Lightning Experience for my users?

The custom profiles selected for this journey are ready for Lightning Experience. But we recommend that you take some time to ensure your implementation will give users the best possible experience.

First, run the [Lightning Experience Readiness Check](#). Even if you ran it recently, it's a good idea to run it again to ensure that you have the most current view of your org in Lightning Experience.

Run these other adoption tools to get the latest information on other tweaks you can make to ensure Lightning Experience is a great experience for all users.

- [Transition Assistant](#)
- [Lightning Experience Configuration Converter](#)
- [Magic Mover for Notes and Attachments](#)
- [Salesforce Optimizer](#)



Frequently Asked Questions

Auto-Enable Lightning-Ready Custom Profiles

How can I help my users prepare for Lightning Experience?

Your users will make the switch to Lightning Experience most easily if they can follow your lead. We suggest a few things:

- Learn as much as you can about Lightning Experience as soon as you can, so you can share your expertise with your users.
- Verify that all the features your users need are available and working as expected, so your users can be confident about doing their jobs in the new user interface.
- Check out a few of the top new features in Lightning Experience, like personalized navigation, Path, Kanban, Lightning Console, Keyboard Shortcuts, and the new Recycle Bin. Review the sample email campaign in the Lightning Experience Enablement Pack.
- Enable Lightning Experience for your custom profile users now, and encourage users to give it a spin.
- Suggest users complete a few Trailhead trails or modules that focus on the features they need the most, so they can learn about Lightning Experience before they get there. Here are a few you might consider:
 - [The Learn to Work in Lightning Experience](#) trail is perfect for users transitioning from Salesforce Classic to Lightning Experience. Users might do the trail as whole, or work its individual modules separately: [Lightning Experience for Salesforce Classic Users](#) and [Lightning Experience Productivity](#).
 - [Salesforce User Tour](#) covers key Lightning Experience features.
- If the date of the transition falls at a time that might inconvenience users, [turn on Lightning Experience](#) and encourage them to make the switch early, or transition the whole org early.



Frequently Asked Questions

Auto-Enable Lightning-Ready Custom Profiles

How can I find out more about Lightning Experience?

Each email and in-app announcement you see contains resources to help you learn about Lightning Experience, get familiar with top features, and prepare your team. Don't want to wait? Here's a selection of our favorite resources.

- [Salesforce Lightning Demo](#) (video, 2 minutes)
- [Learn to Work in Lightning Experience](#) (Trailhead)
- [Lightning Feature Shorts](#) (video series, 3 minutes total)
- [Lightning Experience Pro Tips](#) (blog series)
- [Manage Change for a Successful Transition](#) (video)
- [Optimize Sales Features for Lightning Experience](#) (Trailhead)

These resources help you convert Visualforce pages and JavaScript buttons for Lightning Experience.

- [Prepare Your Visualforce Pages](#) (video, 5 minutes)
- [Converting Your JavaScript Buttons](#) (video, 5 minutes)



WHEN LIGHTNING EXPERIENCE ARRIVES

How can I get my users excited about Lightning Experience?

Many people feel out of their depth when confronted with change—even when it's a change for the better. You can encourage your users by getting them familiar with Lightning Experience now, so they can develop confidence in their ability to use it.

Consider scheduling a training session before Lightning Experience arrives. Make sure users know how to navigate to the features they need to use immediately, and that they become familiar with new features that they couldn't access in the classic interface.

What do I need to do once Lightning Experience arrives?

Consider throwing a party! But there are a few other things you can do to make sure your users are comfortable in their new experience.

- Get feedback from your power users. Feedback can help you determine if your users need training in a specific feature, information about useful new tools, or other targeted information.
- Continue to communicate with your users via email, your company newsletter, or in person, to make sure they feel supported and understand any tweaks you make.
- Optimize page layouts, if you haven't done so already. Even if you have, feedback from your power users might help you tweak layouts to be even more powerful.
- [Hide the Switcher link](#) to turn off Salesforce Classic for users who've moved to Lightning Experience.



Frequently Asked Questions

Auto-Enable Lightning-Ready Custom Profiles

SUPPORT

What’s the overall timeline for this journey?

Admins get email and see notifications in Salesforce Classic at 16, 14 and 7 days prior to the transition. The first email arrives one week prior to the first notification that is sent to users.

End users see in-app notifications in Salesforce Class at 14 and 7 days prior to the transition.

Who should I contact if I need help or have questions?

Visit the [Auto-Enable Lightning-Ready Profiles](#) Community or contact your Portfolio Success Manager or Account Executive.

Was this helpful?

