salesforce

Frequently Asked Questions

End User

Auto-Enable Lightning-Ready
Custom Profiles Journey

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GENERAL

What is Lightning Experience?

Lightning Experience is the new Salesforce, re-imagined with a modern user interface and a suite of new features and tools. Lightning Experience is designed around the sales process, to give you more insight into your customers and put more sales tools into your hands.

What's the difference between Salesforce Classic and Lightning Experience?

Lightning Experience is an innovative new interface completely redesigned from the ground up using the most modern technology and interface design principles. We've focused on what makes our customers successful and the features that customers want most to create Lightning Experience. With integrated AI, easier customization, and more tools than ever, Lightning Experience is designed to help you sell faster and smarter than ever.

Why is Salesforce switching users to Lightning Experience?

Lightning Experience is where all Salesforce innovation is happening. It's where you can find the best features and technology. Your org is well-positioned to take advantage of our optimized CRM experience.

When will I get switched to Lightning Experience?

We'll automatically transition you to Lightning Experience a couple weeks after the first in-app notification about the change. To see an exact countdown, log in to Salesforce, and look for the announcement banner at the top of the page.

Your admin may opt to move you to Lightning Experience sooner.

Am I affected?

Yes. Lightning Experience will be enabled for you and for other users in your org with profiles that are ready for it.

What happens if I don't do anything before I'm switched to Lightning Experience?

You'll still move to Lightning Experience, but you might feel unprepared. We recommend checking out the resources listed below, as well as the links in the in-app announcements.

Are the features I need available in Lightning Experience?

Lightning Experience is packed with the features you need, as well as new tools, features, and technology that helps you be more productive, work more efficiently, and do your job more easily.

For most users, the biggest change is learning a new navigation system and getting comfortable with new page layouts. But don't worry. We've designed Lightning Experience to help you do more with fewer clicks.

If you can't find the feature you're looking for, click the "?" in the top right corner to get help, or ask your Salesforce admin.

Can I still use Salesforce Classic?

Yes, you can switch back until your org's admin disables switching between interfaces. Salesforce Classic isn't gone, but it's taken a back seat to newer technologies. You can temporarily switch back to Salesforce Classic by clicking your profile icon in the upper right corner of the Lightning Experience header, then selecting **Switch to Salesforce Classic**.

PREPARING FOR LIGHTNING EXPERIENCE

How can I prepare for the move to Lightning Experience?

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

- **Salesforce Lightning Demo** (video, 2 minutes)
- **Lightning Experience Basics** (video series, 10 minutes total)
- **Lightning Feature Shorts** (video series, 3 minutes total)
- **Salesforce User Tour** (Trailhead)
- **Learn to Work in Lightning Experience** (Trailhead)

WHEN LIGHTNING EXPERIENCE ARRIVES

What do I need to do after Lightning Experience arrives?

Dive on in! We hope you have a chance to learn Lightning Experience basics before the transition happens. But you can learn anytime using the links we've shared here and other resources like **Trailhead**. Now that Lightning Experience is here, here are a few more things to consider.

- Check out the **Learn to Work in Lightning Experience** trail. We designed it for users like you, who already know how to work in Salesforce Classic. It's set up so you can complete the whole trail at once, or work on it in 10-minute chunks when you have time.
- Share what you learn with your coworkers.
- Send feedback to your Salesforce admin. Your admin can adjust page layouts and make other changes to optimize Lightning Experience for your org's business practices.

SUPPORT

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

You can find tips, tricks, instructions, and lots of other information about Lightning Experience in the **Salesforce help** and in **Trailhead**. In Lightning Experience, click the "**?**" at the top of each page to see page-specific help resources.

If you can't find the answer you need, ask your Salesforce admin.

Was this helpful?