



Lightning Experience Overview

Meet the new Salesforce!

Annie Egan Innovation Specialist

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.

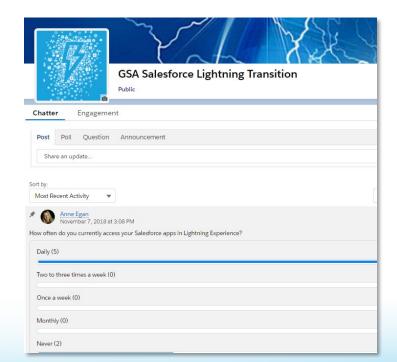
Stay in the know about Lightning

To keep updated on our transition to Lightning be sure to join the <u>GSA Salesforce</u> 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



What is Salesforce Lightning?

Lightning is the Future of Salesforce

Experience

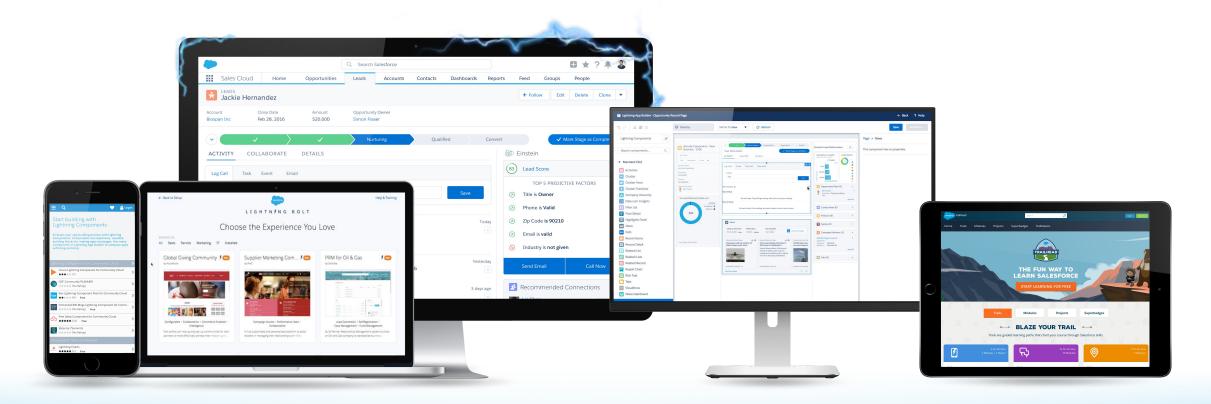
Be more productive in every moment

Platform

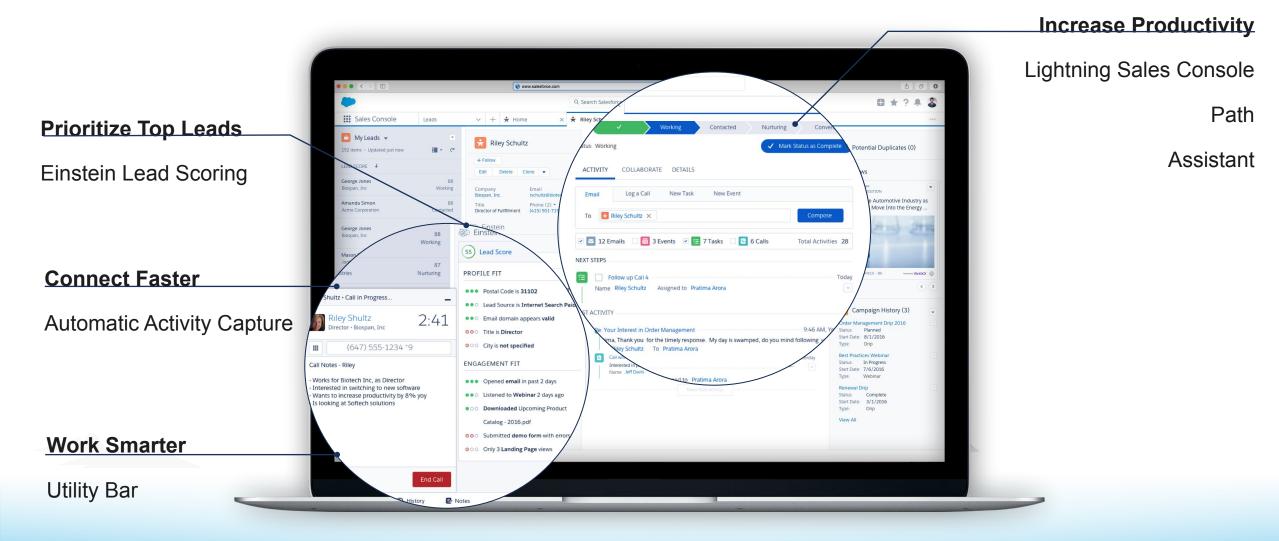
Aligned tools for customers, partners, and Salesforce

Ecosystem

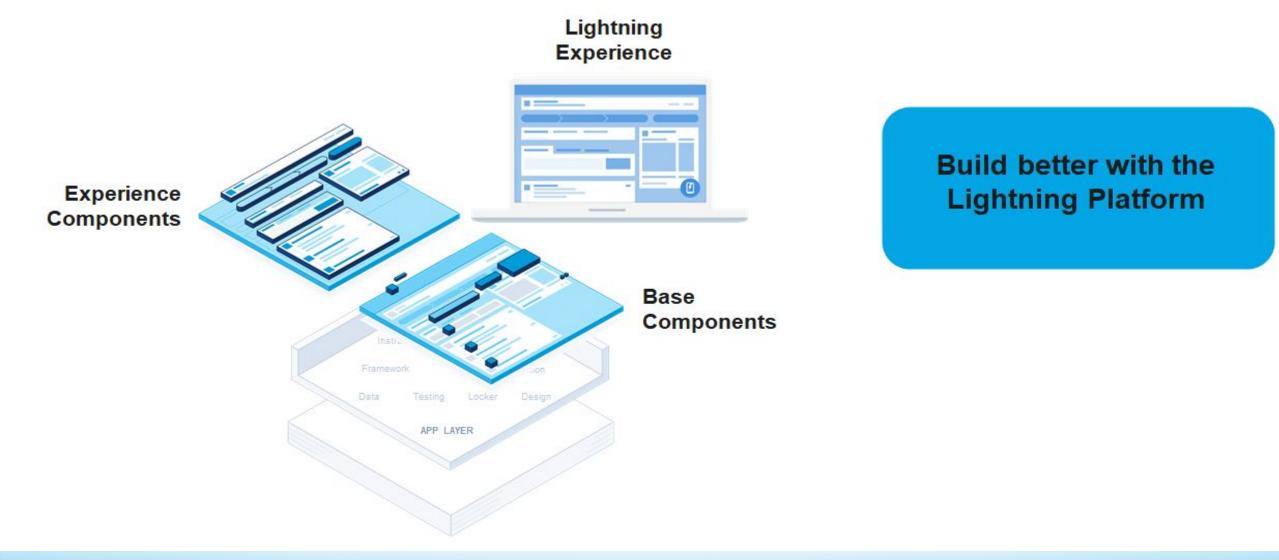
Lightning-ready apps and components on the AppExchange



Experience: A New UI to Increase Productivity

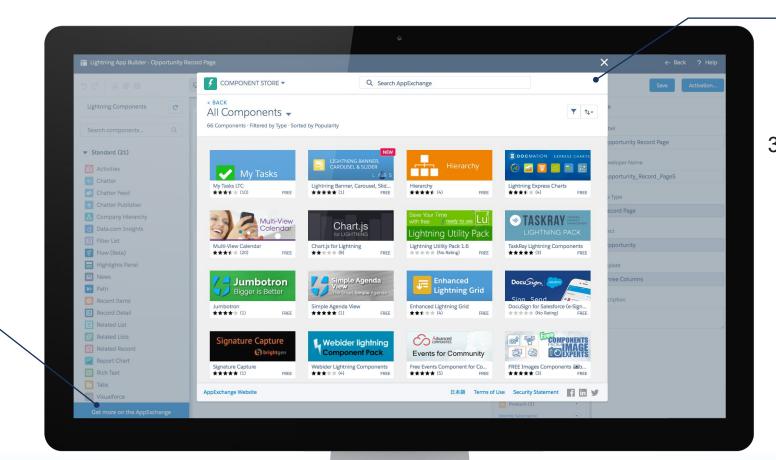


Platform: A Better Way to Build Custom Experiences



Ecosystem: Lightning-Ready Components and Apps

Lightning Exchange from AppExchange, available from Lightning App Builder



Extend Any App

490+ Lightning-Ready Apps60+ Lightning Components300+ 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



Introduction to Lightning Experience

Productivity features available only in Lightning Experience

Meet the New Salesforce!

Maximize Your Productivity

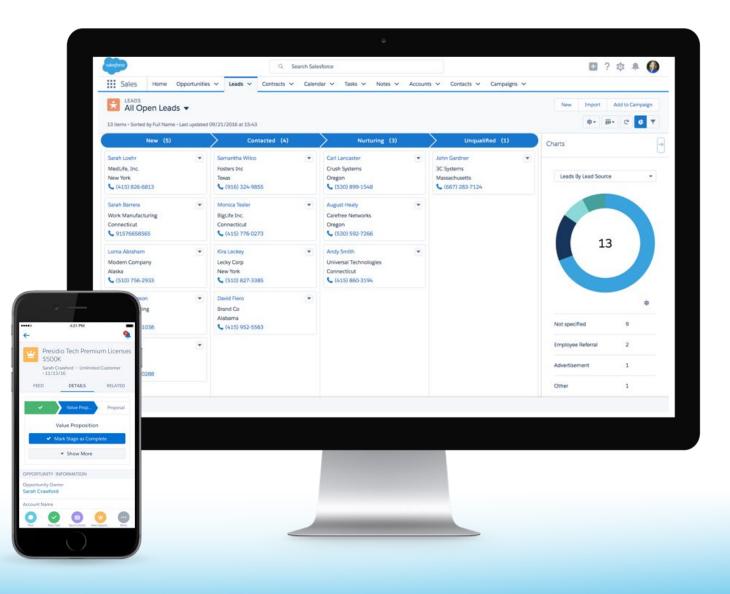
New collaboration and process tools boost user efficiency

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



Share Information Easily and Find What You Need Faster



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T&P All Hands	Nathan Anderson	_
Site Reliability	Advisor Advisor	
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- Personalized Chatter streams
- Recent groups
- Share posts
- Live feed typing indicators
- Relevance ranked feed



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	Buyer	tfowler@jetwire.info	8-(9	FAVORITES Tesla Cloudhub + Anypoir	1.60			
	Buyer	wburke@avamm.com	5-(1	Sales · Opportunity	11 CO			-
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	Buyer	cking@skyvu.info	8-(5					T

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

Global Search

Q "ibm" in Salesforce

IBM IBM

IBM Renewal - 1yr/100k Opportunity - Proposal/Ouote

Account • Menio Park

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6/25/2016

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William Hale

Dashboards V Reports V Feed V

- 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

3

Sales

Accounts

Contacts

Leads Groups Files Dashboard Reports

Opportunit

Visualize Your Data with New Reports and Dashboards

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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





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

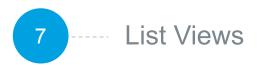
Visualize Your Data at a Glance and Make Edits Quickly



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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



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(555) 555-5555	(555) 555-5555	(555) 555-5555	(555) 555-5555		
Tesla Motors	Intuit	Twilio	Microsoft		
Jason Dewar	Miranda Chan	Jason Dewar	Miranda Chan		
Harvey Aguilar	Gary McDaniel	Patrick Vaughn	Patrick Vaughn		
(555) 555-5555	(555) 555-5555	(555) 555-5555	(555) 555-5555		
Microsoft	Tesla	Tesla Motors	Tesla Motors		
Mike Elowson	Kate Bale	Mike Elowson	Mike Elowson		
Lettie Bates	Lettie Bates	Terry Evans	Terry Evans		
(555) 555-5555	(555) 555-5555	(555) 555-5555	(555) 555-5555		
Honda	Honda	Johnson + Johnson	Johnson + Johnson		
Miranda Chan	Miranda Chan	Jason Dewar	Jason Dewar		
Kevin Diaz		Verna Bradely			
(555) 555-5555		(555) 555-5555			
Tesla Motors		Sungevity			
John Brooks		Jason Dewar			

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

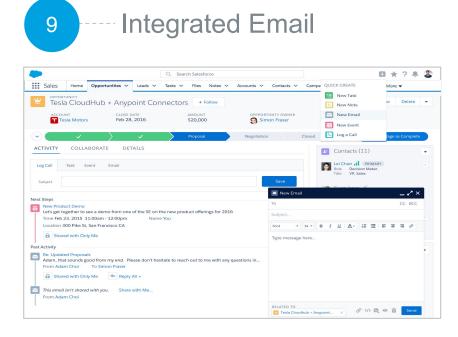


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001002 Seeking guidance on electrical wiring installation for OC5080 alated 1/22/2018 8:07 PM	Account Owner	Retire Cold	
001024 Design issue with mechanical rotor w 1/22/2018 8.07 PM	Account Name Kelly Walker	Phone (503) 421-7800	New Task Log a Call New Event Ernail
001000 Starting generator after electrical failure	Parent Account	Fax (503) 421-7801	Create a task Add
	Account Number CC947211	Website www.expressi&t.net	Activity Timeline 🔻 C' Expand All
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001027 w 2/23/2018 9:58 AM	Type Customer - Channel	Ownership Public	> [No subject] Feb 23 v
001026 Testing	Infustry Transportation	Employees 12,300	You have an upcoming Task
w 2/13/2018 1.34 PM	Annual Revenue \$950,000,000	SIC Code 8742	You have an upcoming Task about Play Pack
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001004 Digestive Issue sed 1/22/2018 8:07 PM	Portland, Oregon 97204 United States Portland, OR	Portland, Oregon 97204 United States	No past activity: Past meetings and tasks marked as done show up here Load More Past Activities
001005 Food not right flavor sed 1/22/2018 8.07 PM	Customer Priority Medium	SLA Platinum	

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



10 Lightning Record Pages

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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

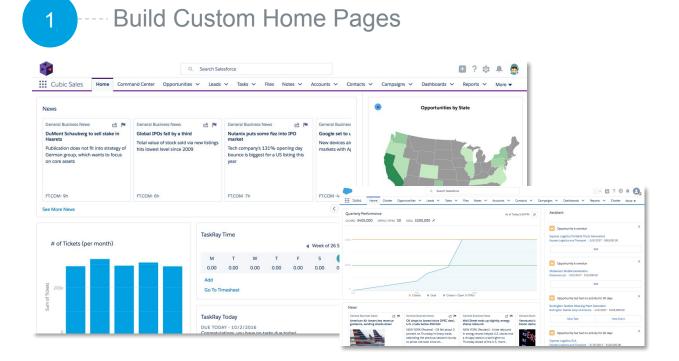
Build, customize, and deploy apps faster, no code required

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.

- 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



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



Bring Your Console Apps to Lightning Experience

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Service Desk Cases	→ →	3245 V X		
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Riley Schultz 🖈 Director of Ops	EMAIL LOG A CALL NEW TASK	200+ Items - Sorted by Relevancy		
r.schultz@biosprin / (415)901-7193	Write Something	How to choose climbing ropes for newbees		
Location 1 Market St., San Francisco, CA 94107	Filter: ALL UPDATES ALL EMAILS PRIVATE ANSWERS CALL LOGS CASE NOTES	and what does an introduction for beginners about climbing ropes and how they can use		
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Related Cases (3)		How to choose climbing ropes for newbees and what does		
I can't find the reset button on my router Case Number: 00038423 Status: Closed	-	an introduction for beginners about climbing ropes and how they can use 000001296 • Published • How to Guide Last Modified: 1/14/2016		
Date: 1/31/15 3:45PM		➡ 1320 ♥ 10		
Lost Password Case Number: 00038423 Status: Closed	•	How to choose climbing ropes for newbees and what does		

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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Products	(2)			New	Task Event Email
Ridged Borescop		•	CAT Deluxe Power Drill List Price: \$145.00 Quantity: 30	×	Save

Guide users through each stage of a process

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



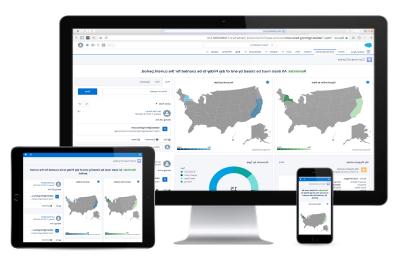
Customize and Assign Record Pages for Custom & Standard Objects

Q. Search Salesforce	🖬 ? 🌣 🐥
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ccount Name Close Date Amount Opportunity Owner Inited Partners 10/20/2016 \$128,025.00 🎆 Eric Jacob	
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Subject	available for this company.
Call Sove	General Business News 😢 🍽 General Business New
	DuMont Schauberg to sell stake in Global IPOs fall by a Haaretz
itter Timeline 💌 🕑	Publication does not fit into strategy of hits lowest level since
Vext Steps More Steps	German group, which wants to focus on core assets
E Demo next Sep 18	
Name Lauren Boyte	FT.COM+9h FT.COM+6h
ast Activity	See More News
BANT call Sep 18 Name Lauren Boyle	
Name Lauren Boyte	Opportunity Team (3)

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





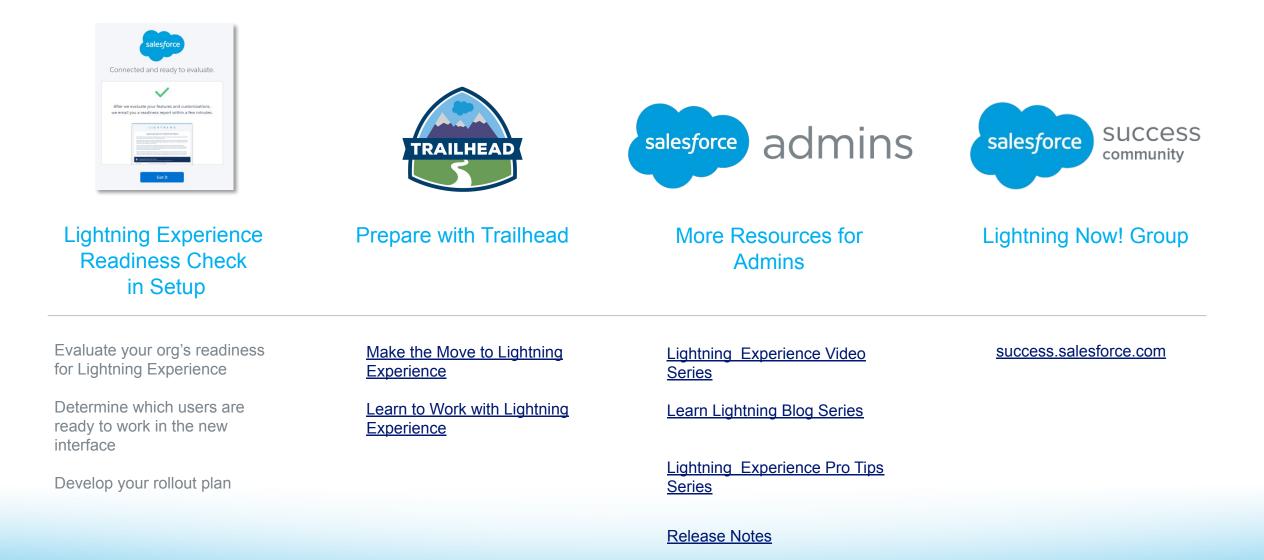
Build a new page once & deploy it to Lightning Experience and Salesforce1

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



Resources

Resources



THANK YOU