



THE CUSTOMER SUCCESS PLATFORM



Lightning Experience Overview

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

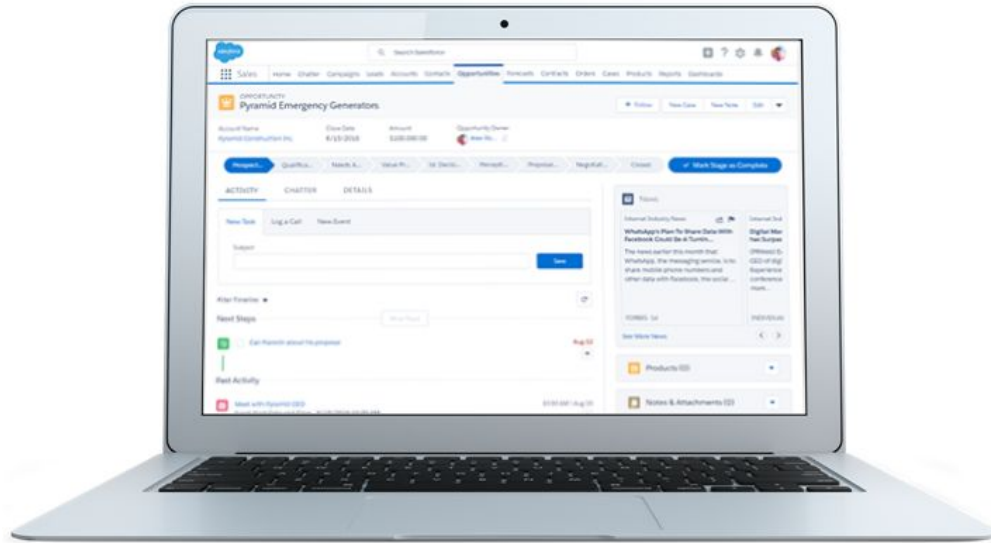
Why is GSA moving to Lightning?

- 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.

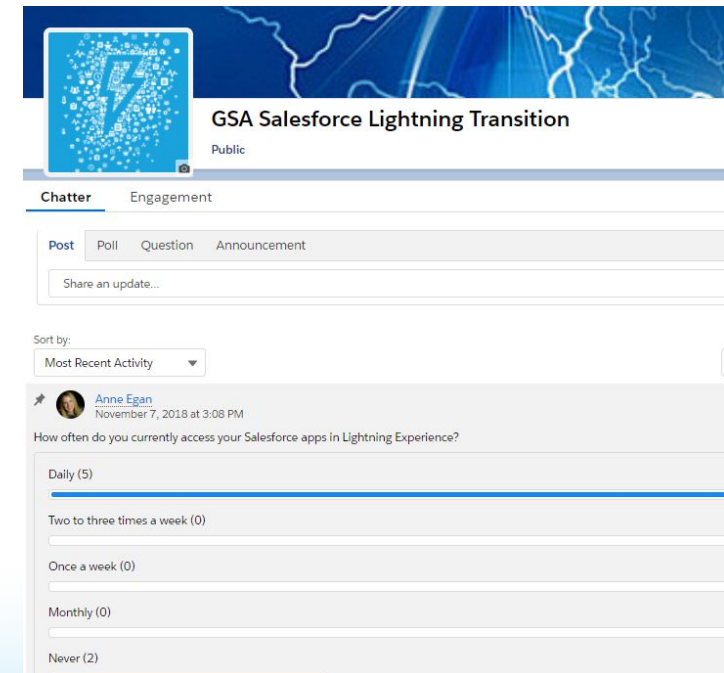
Stay in the know about Lightning

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



What is Salesforce Lightning?

Lightning is the Future of Salesforce

Experience

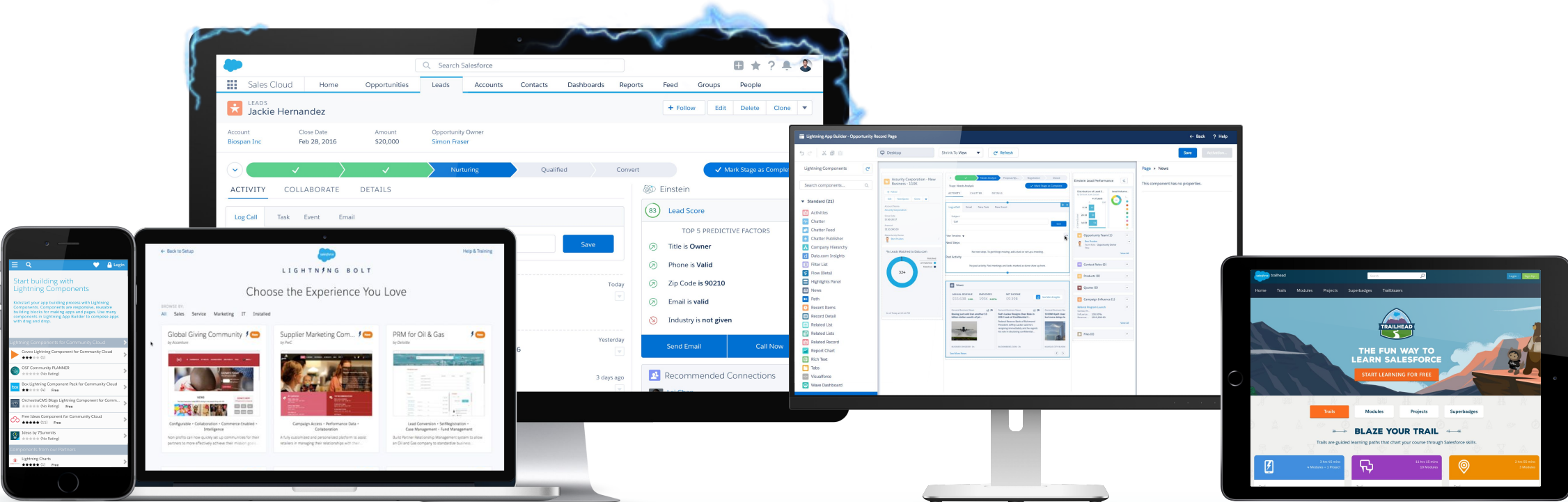
Be more productive in every moment

Platform

Aligned tools for customers, partners, and Salesforce

Ecosystem

Lightning-ready apps and components on the AppExchange



Experience: A New UI to Increase Productivity

Increase Productivity

Lightning Sales Console

Path

Assistant

Prioritize Top Leads

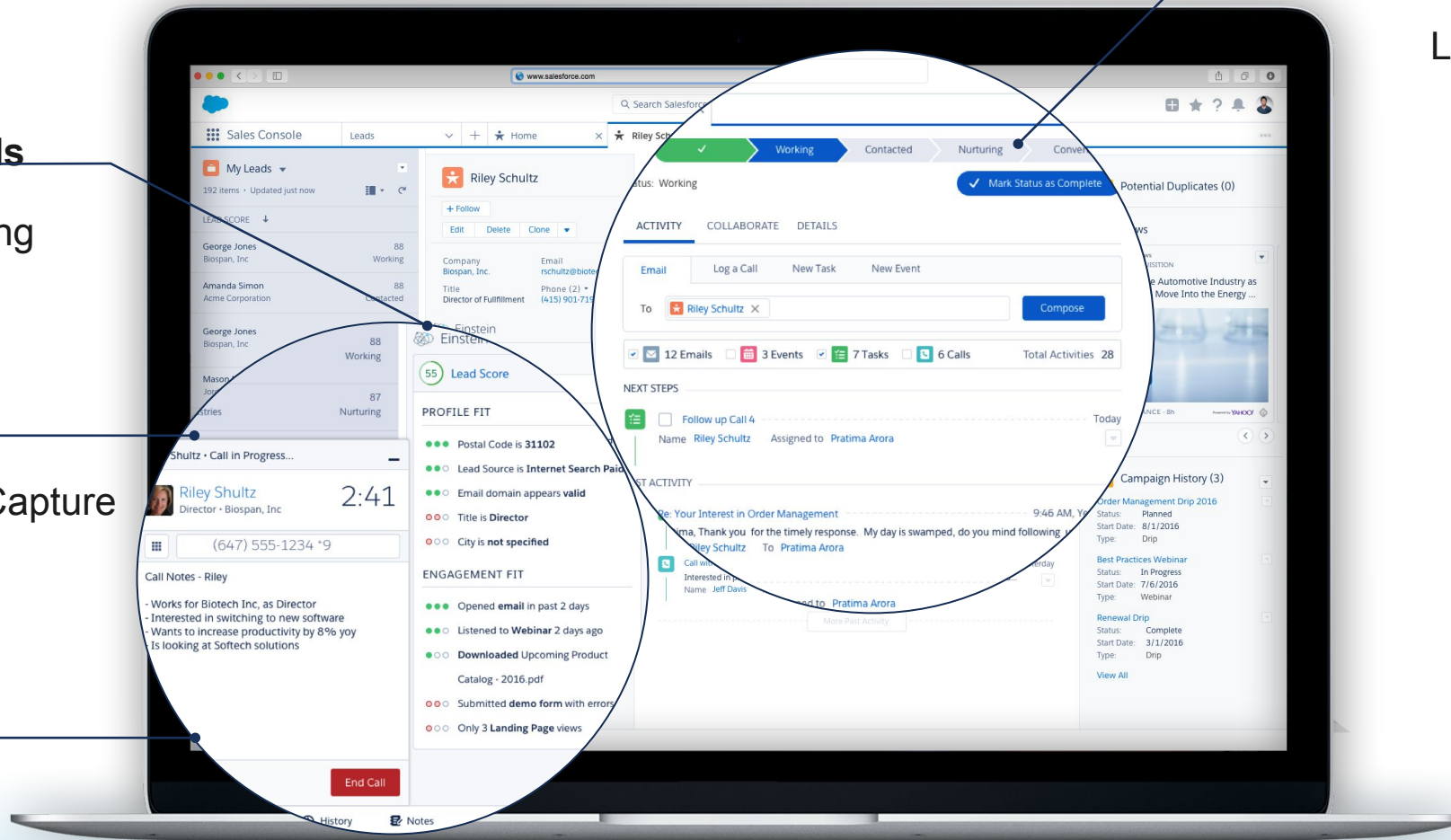
Einstein Lead Scoring

Connect Faster

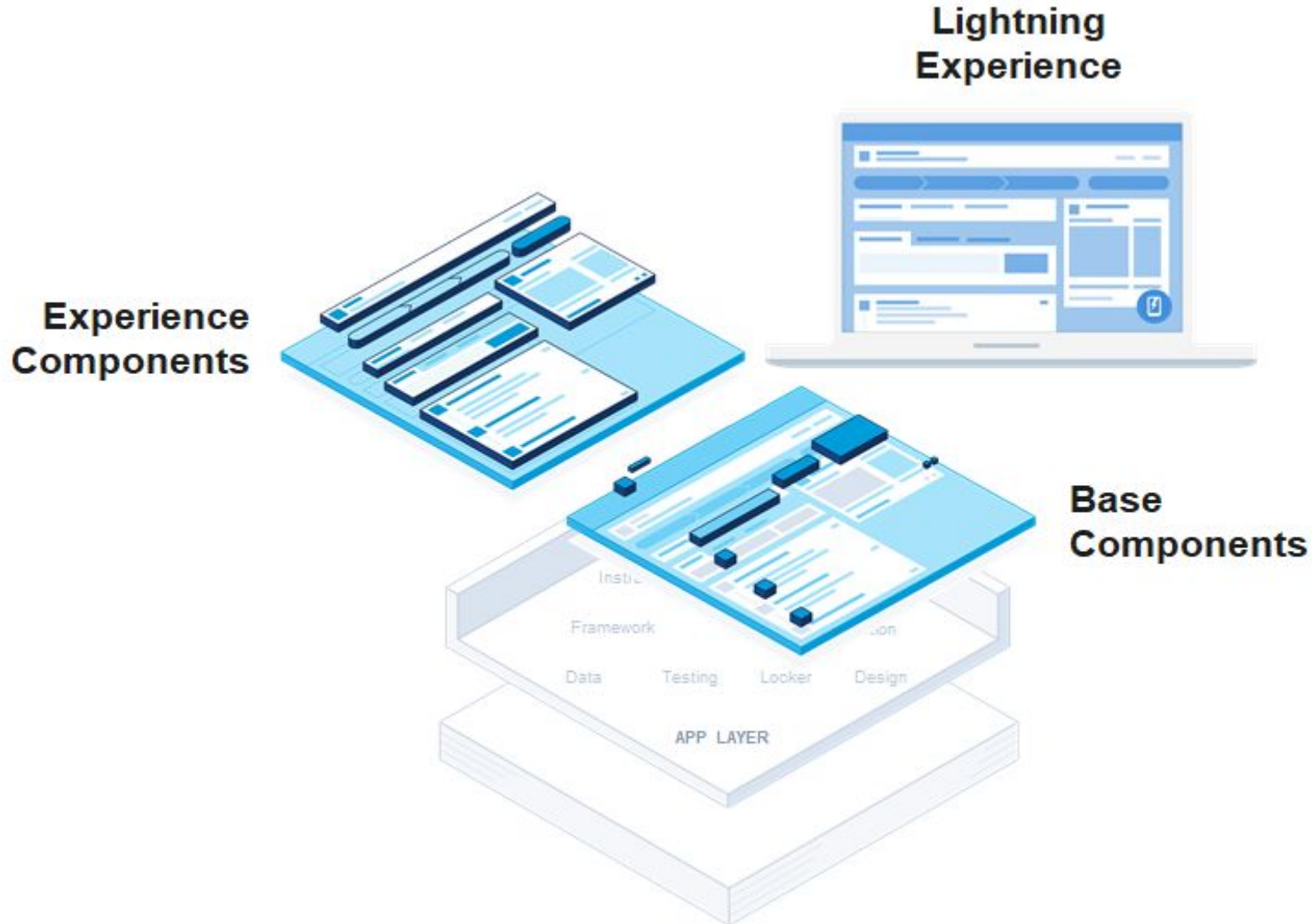
Automatic Activity Capture

Work Smarter

Utility Bar



Platform: A Better Way to Build Custom Experiences



**Build better with the
Lightning Platform**

Ecosystem: Lightning-Ready Components and Apps

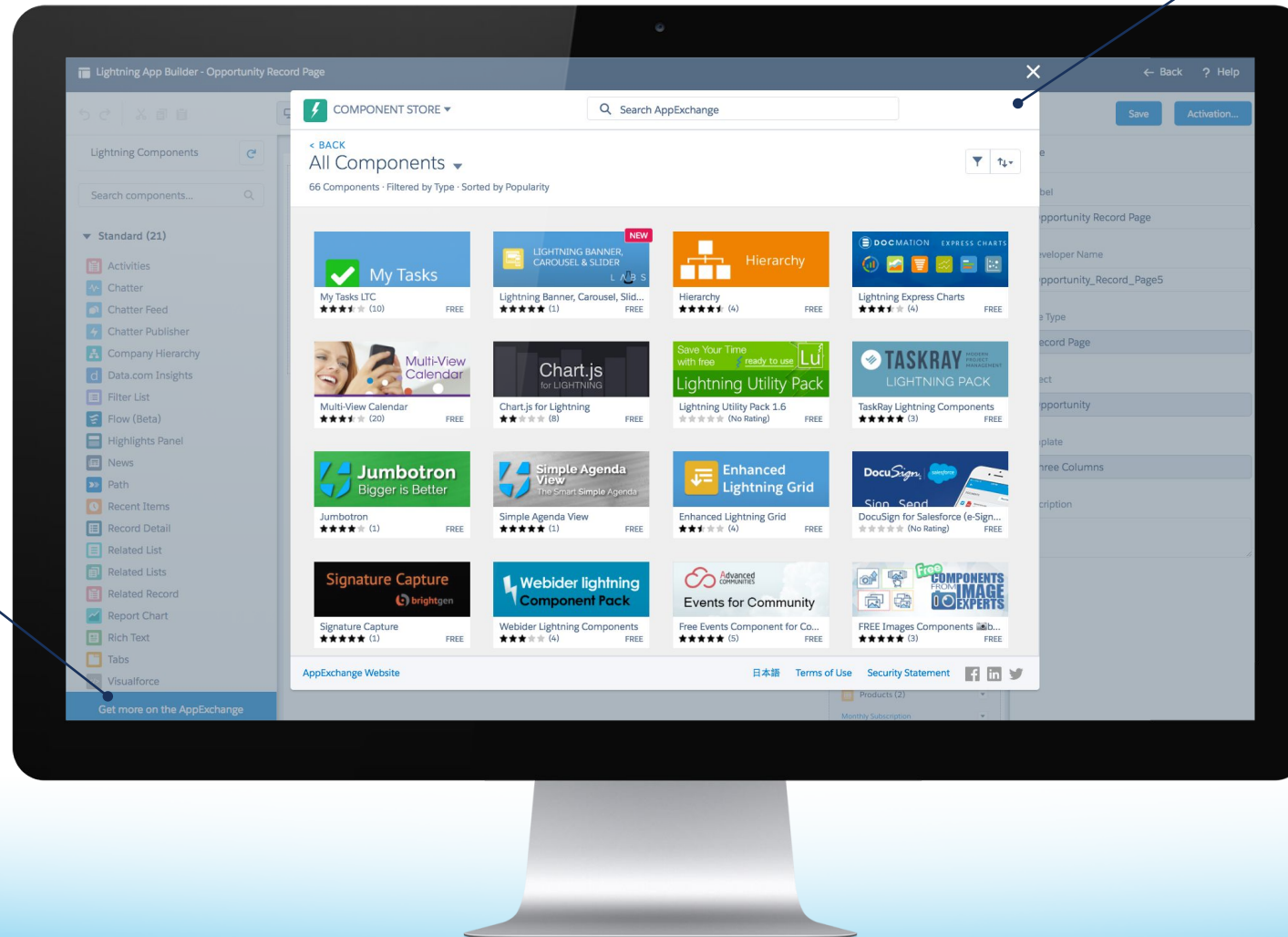
Lightning Exchange from AppExchange, available from Lightning App Builder

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

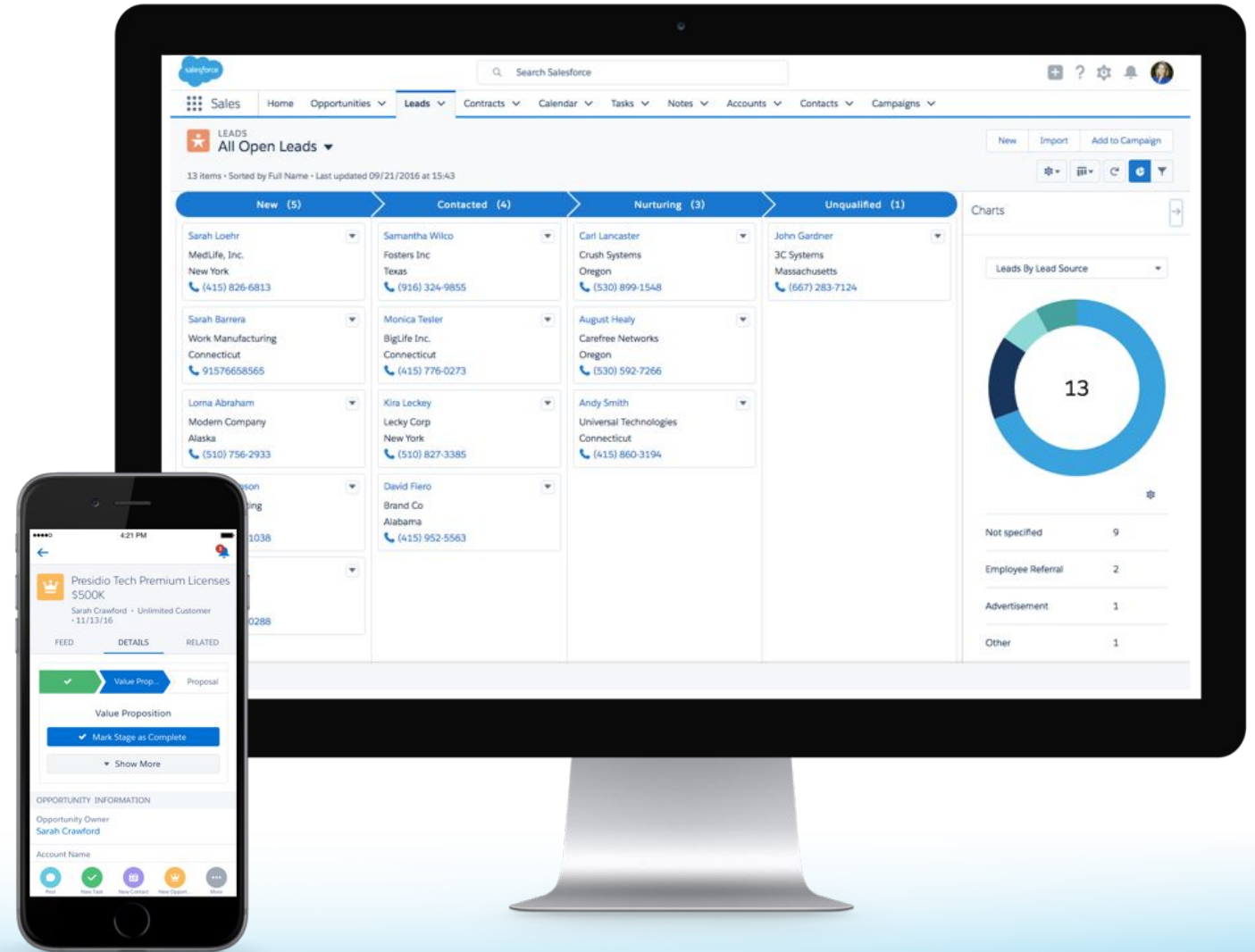
New collaboration and process tools boost user efficiency

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



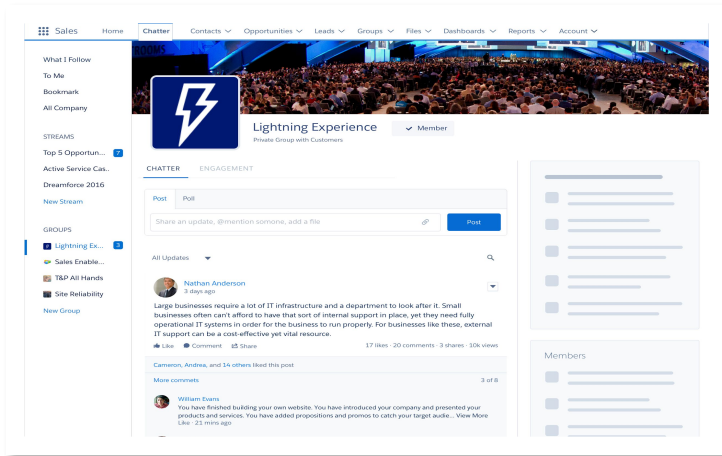
10 Lightning Experience Features for Salesforce Users

Out of the box features with little to no customization required

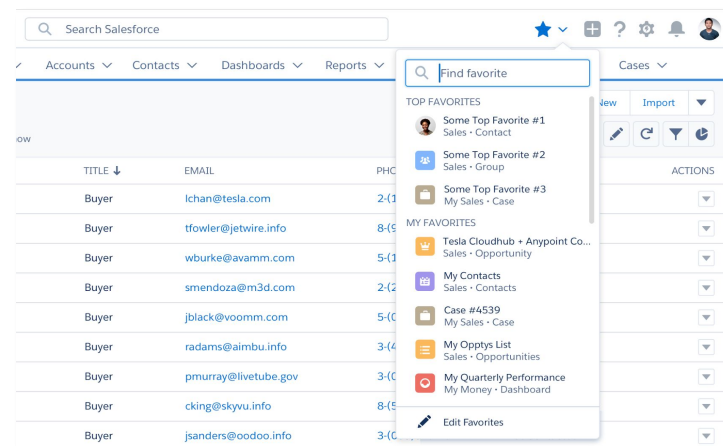
- 1 Chatter Feed
- 2 Navigation
- 3 Global Search
- 4 Reports
- 5 Dashboards
- 6 Calendar & Tasks
- 7 List Views
- 8 Console
- 9 Integrated Email
- 10 Lightning Record Pages

Share Information Easily and Find What You Need Faster

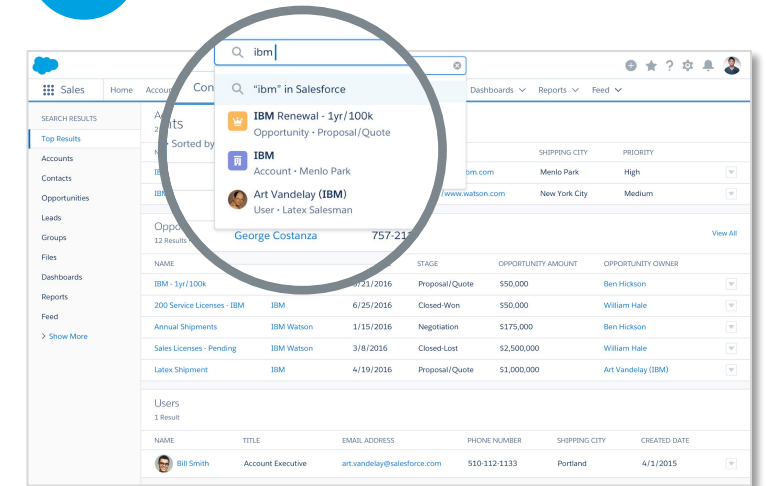
1 Chatter Feed



2 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

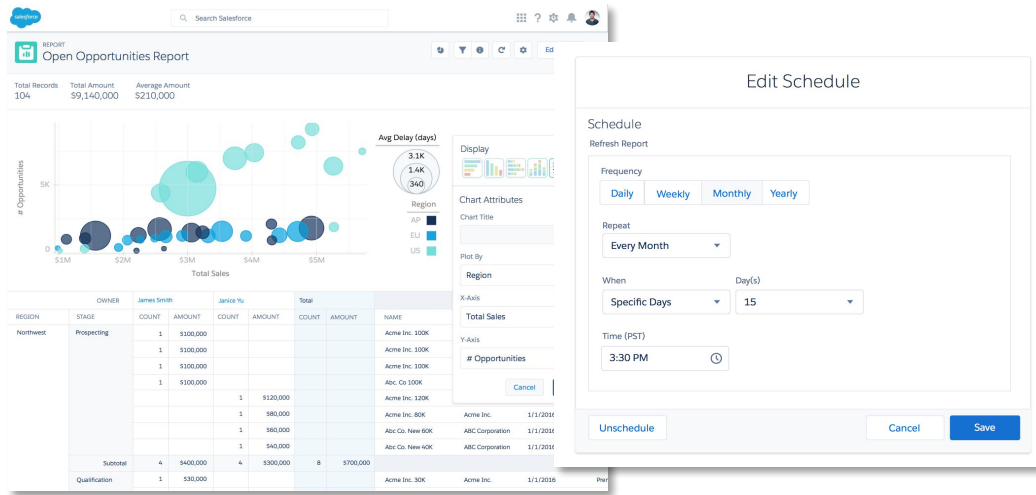
- Favorites: bookmark records, views, opportunities and more
- Personalized Navigation: add the pages you need to the navigation bar

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

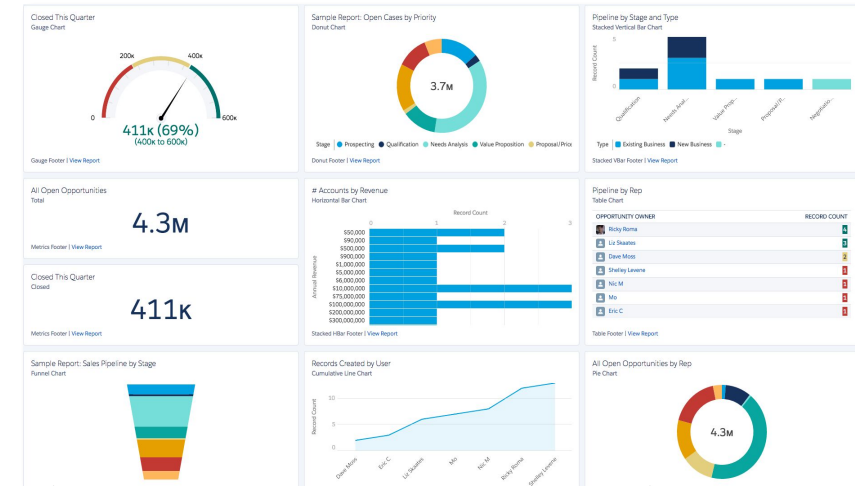
4 Reports



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

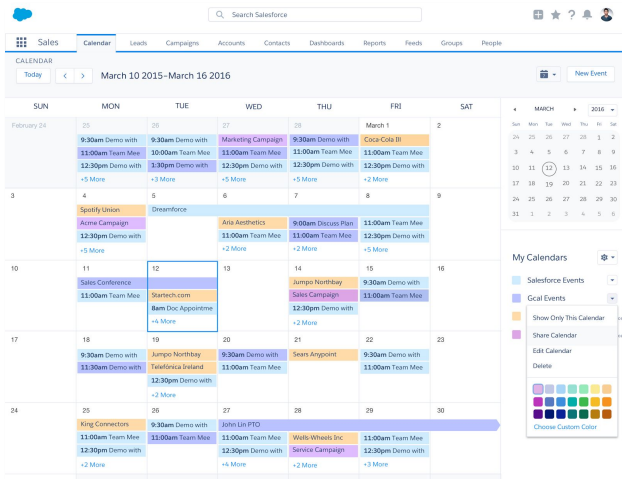


Visually display key metrics and trends for records in your org

- 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

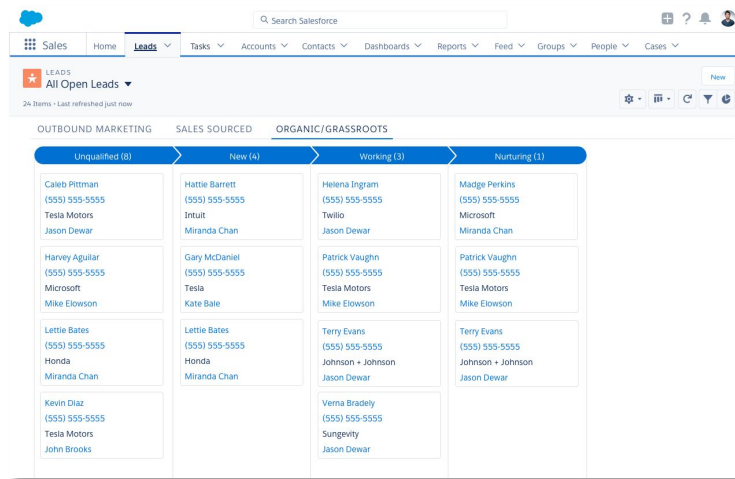
6 Calendar and Tasks



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

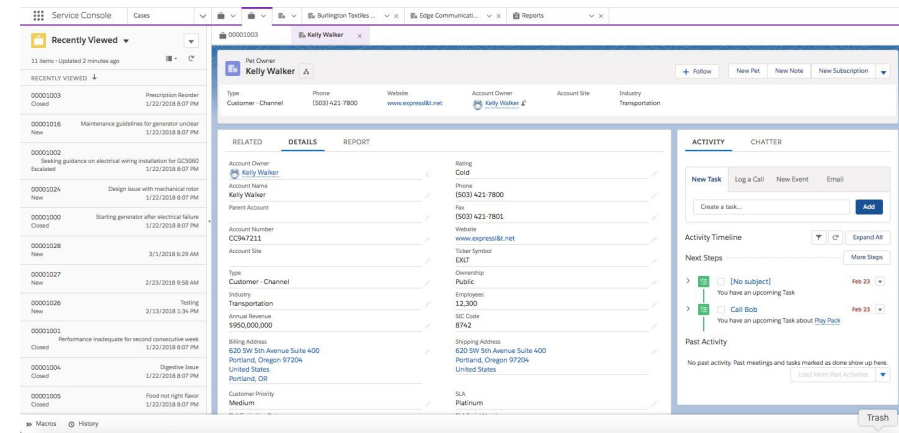
7 List Views



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

8 Console

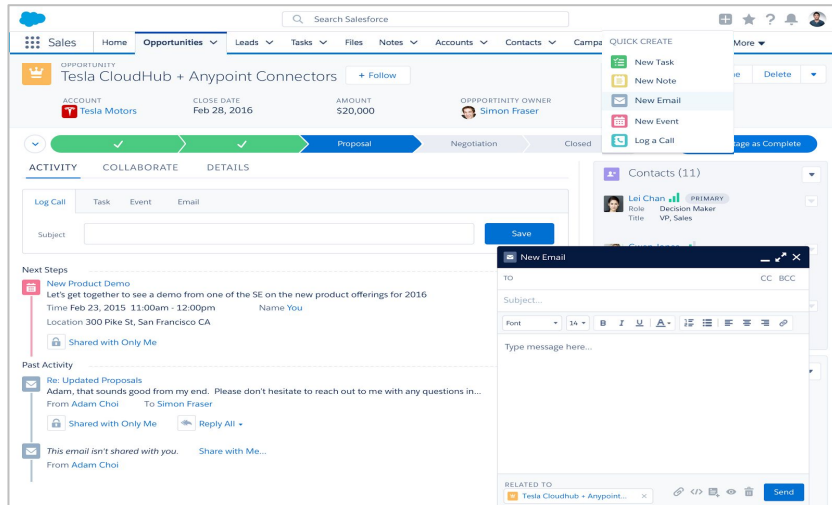


Drive productivity while working in Salesforce

- 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

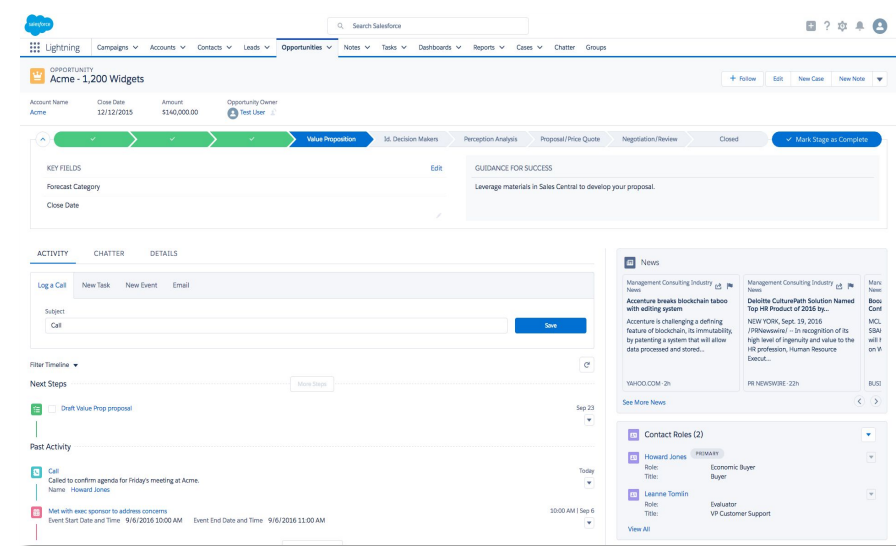
9 Integrated Email



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

10 Lightning Record Pages



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

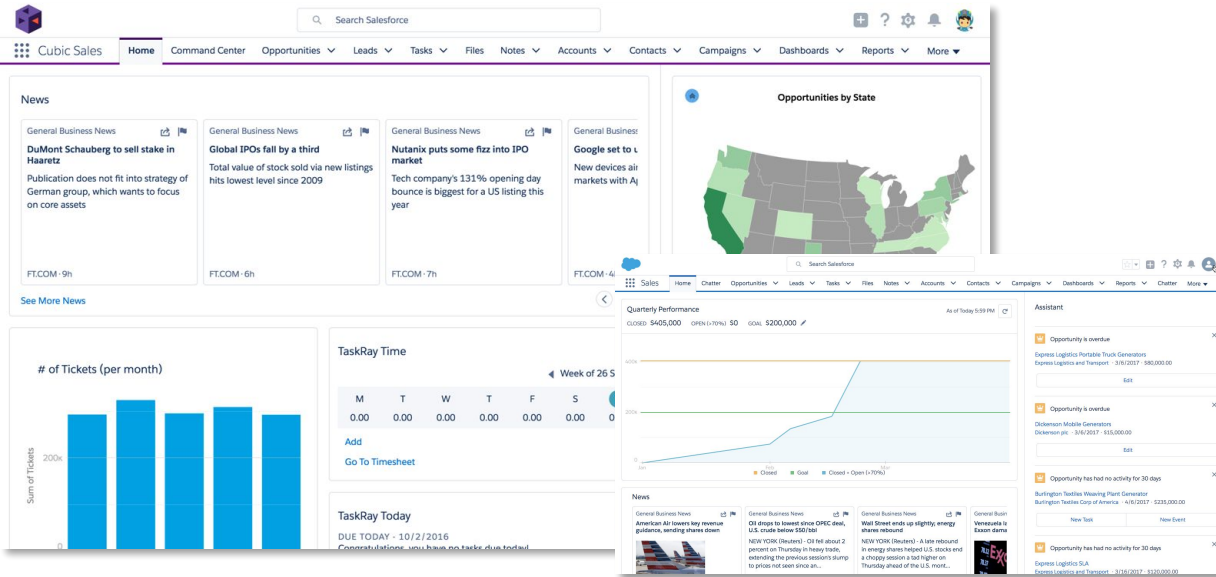
5 Ways to Customize Lightning Experience

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

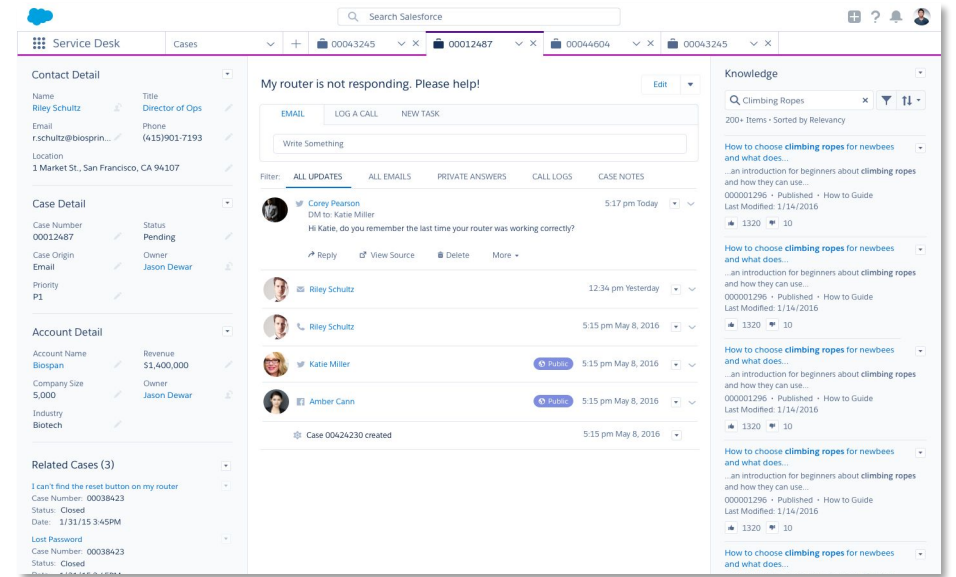
1 Build Custom Home Pages



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

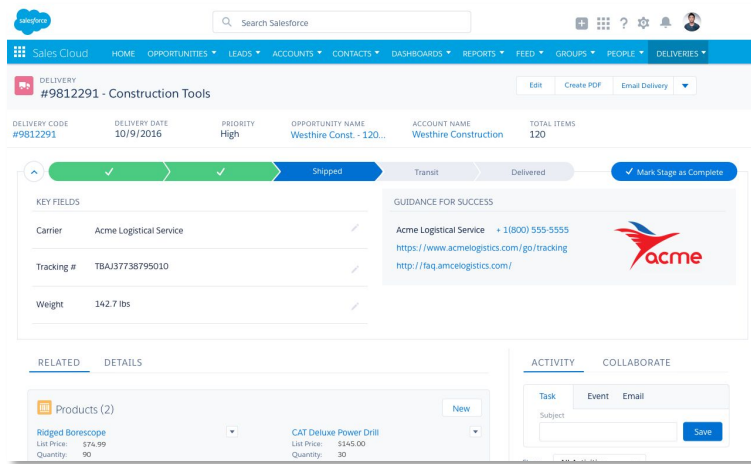


Give users access to the information they need to get their jobs done faster

- 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

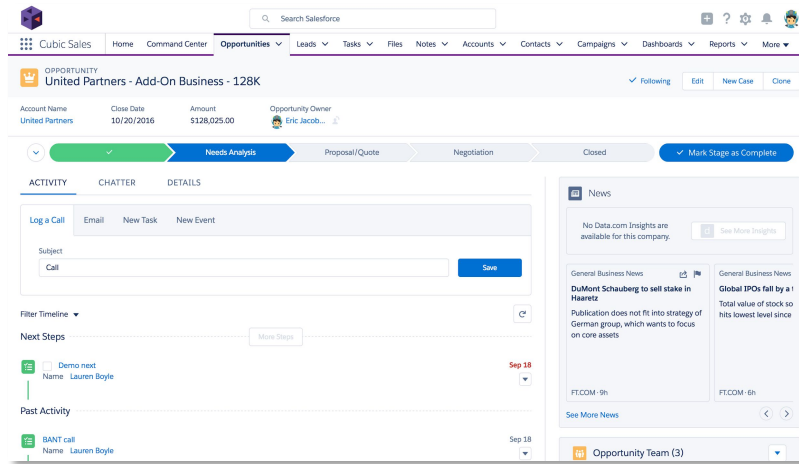
3 Path on More Objects



Guide users through each stage of a process

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

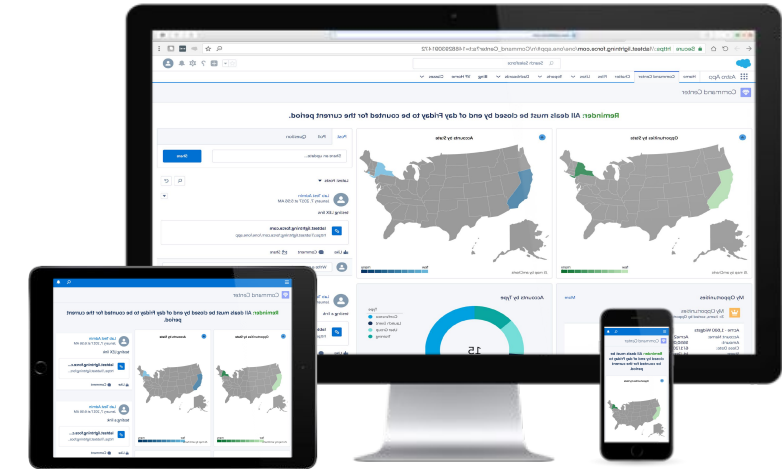
4 Customize and Assign Record Pages for Custom & Standard Objects



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

5 Build Lightning App Pages for Mobile Users



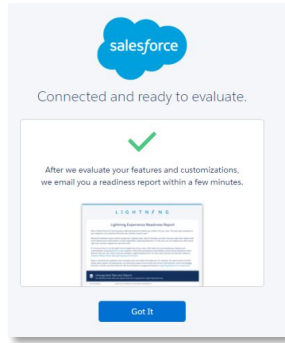
Build a new page once & deploy it to Lightning Experience and Salesforce1

- 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](#)

[Release Notes](#)



Lightning Now! Group

success.salesforce.com

THANK YOU