



Lightning Experience Readiness Report

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4.0

Welcome! We want to partner with you on your journey to Lightning Experience. To help you get started quickly, we've prepared this personalized Lightning Experience Readiness Report.

What's in This Report?

We've analyzed your Salesforce implementation and identified some key features and customizations that aren't fully supported in Lightning Experience. To understand which features and customizations we've evaluated, see [What Does the Readiness Report Check Evaluate?](#) in Salesforce Help.

How Do I Use This Report?

Review your report to learn about the tweaks you need to make to get ready for Lightning Experience. Then, learn how you can [use the report to develop your rollout plan](#).



Still have questions?

Get a free consultation with a Lightning Experience expert.

[Sign Up](#)

✓ The Good Stuff

Congratulations! These features and customizations are ready

✓ Custom Buttons and Links - JavaScript

✓ Home Page and Sidebar Components

✓ Email Templates

✓ Lookup Filters

✓ AppExchange Packages

✓ Visualforce Overrides

✓ Data.com




Needs Some Attention

These features and customizations need your attention.

Tabs, Objects, and Related Lists

These tabs and objects aren't supported in Lightning Experience.

Users can see these tabs and objects in Lightning Experience, but when users select them, a new browser tab opens, displaying Salesforce Classic.

TAB OR OBJECT	APP	WHEN IS IT COMING TO LIGHTNING EXPERIENCE?	USER IMPACT
Documents		 No plans to develop this feature for Lightning Experience. Looks like your users haven't created any documents in the last 6 months, so you can probably migrate to Lightning Experience without this feature. Or, you can migrate to Salesforce Files to save, share, and collaborate around documents.	 Included in 13 profiles, assigned to 3 total users
Enterprise Territory Management		 We're getting there! Enterprise Territory Management works with Lightning Experience behind the scenes, so your territory sharing rules are applied just like in Salesforce Classic. However, in Lightning Experience, the territory related list isn't available on accounts yet, and you can't add territories to accounts manually.	

Related Lists

These related lists aren't supported, which means users can't see them in Lightning Experience.

RELATED LIST	LOCATION	WHEN IS IT COMING TO LIGHTNING EXPERIENCE?	USER IMPACT
Account Partners	Account Layout	⚠ Stay tuned. Lightning didn't strike yet.	🔑 Included in 14 profiles, assigned to 3 total users
Campaign Members	Campaign Layout	⚠ This feature is available in Lightning Experience. However, we're still working on the filter feature for the campaign member related list. Stay tuned.	🔑 Included in 14 profiles, assigned to 3 total users
Campaign Hierarchy	Campaign Layout	⚠ This feature is coming in Spring '17.	🔑 Included in 14 profiles, assigned to 3 total users
Opportunity Partners	Opportunity (Support) Layout , Opportunity (Marketing) Layout , Opportunity Layout , Opportunity (Sales) Layout	⚠ Stay tuned. Lightning didn't strike yet.	🔑 Included in 14 profiles, assigned to 3 total users



What should you do?




Decide which users can work without these tabs, objects, and related lists, and migrate those users to Lightning Experience. [Learn More](#)

Custom Buttons and Links—URLs

These custom buttons and links point to other pages in your Salesforce domain (also known as internal URLs). Users can see these buttons and links in Lightning Experience, but the buttons and links might not work as expected.

URL BUTTON	LAYOUTS CONTAINING THE BUTTON	USER IMPACT
UpsellCrosssellOpportunity	Case Layout , Case (Support) Layout	 Included in 12 profiles, assigned to 2 users
ViewCampaignInfluenceReport	Campaign Layout	 Included in 14 profiles, assigned to 3 users

What should you do?

 Test these buttons and links to see whether they work as expected. To run your test, preview Lightning Experience from the Migration Assistant in Salesforce Setup. If you notice problems, update your custom URL buttons and links to ones that are supported in Lightning Experience. To learn more, check out these resources.



Learn more

- [JavaScript Buttons, Lightning, and You: A Blog Series](#)
- [Constructing Effective Custom URL Buttons and Links](#)
- [Replacing URL Hacks with Actions](#)

Salesforce Console

You're using Salesforce Console for Sales or Service. Console is supported in Lightning Experience, but some features differ from those in Salesforce Classic. Some work differently than their Salesforce Classic counterparts or require some setup from you. Other console features aren't available in Lightning Experience yet.

Impacts Specific Console Apps


FEATURE	APP LABEL	WHEN IS IT COMING TO LIGHTNING EXPERIENCE?
Multi-monitor support	standard__ServiceConsole	 Stay tuned. Lightning didn't strike yet.
Choose how items display	standard__ServiceConsole	 Stay tuned. Lightning didn't strike yet.

User Impact



Included in 1 profiles, assigned to 0 total users.

What should you do?

 For supported features, you can set up users with Salesforce Console functionality similar to what they were using in Salesforce Classic by customizing the Sales Console or Service Console apps in Lightning Experience with the workarounds we've suggested.

For unsupported features, decide which users can work without these items, and migrate those users to Lightning Experience. [Learn More](#)

Learn more

- [Salesforce Console in Lightning Experience](#)
- [Lightning Sales Console](#)
- [Lightning Experience Service Basics Module](#)

Hard-coded URLs and My Domain

These URL references might not work as expected if you decide to use My Domain in Lightning Experience. We recommend that customers enable My Domain when migrating to Lightning Experience.

What's My Domain and Why Should I Use It?

With My Domain, you create a custom URL to replace the original URL that Salesforce assigned to you. For example, you replace an assigned URL, like *https://yourinstance.salesforce.com*, with the chosen domain name, *https://somethingcool.my.salesforce.com*.

In addition to getting your company's brand into Salesforce, My Domain lets you take advantage of other awesome Lightning Experience features. For example, enabling My Domain lets you use Lightning App Builder or standalone apps to build custom Lightning Components on tabs or Lightning Pages.

If you decide to use My Domain, you have to replace hard-coded references to your original URL with references to your new custom one.

These are some of the places where your Salesforce instance includes hard-coded references to your original URL. Keep in mind that we checked for some hard-coded URLs, but not those in package or feature integrations, workflows, Chatter posts, content URLs, Salesforce Documents, or static content.

URL TYPE	URL LOCATION	REFERENCE IN SALESFORCE
Custom Buttons and Links - URLs	UpsellCrosssellOpportunity	<code>https://na1.salesforce.com/opp/oppedit.jsp?accid={!Account_ID}&opp3=Up-sell+/+Cross-sell&opp5=Existing+Customer&opp6=Customer+Support</code>

What should you do?




Ask your Salesforce developer to revise these URL references. Have your developer review the resources below to learn best practices for revising your URLs.

Learn more

- [My Domain URL Changes](#)
- [Automating the update of hard-coded references](#)
- [Guidelines and Best Practices for Implementing My Domain](#)
- [Best practices for URLs in Apex](#)

Sharing Buttons

These sharing buttons aren't supported in Lightning Experience, which means that your users can't see the buttons.

OBJECT	BUTTON LOCATION	USER IMPACT
Account	Account Layout	 Included in 14 profiles, assigned to 3 total users

What should you do?



Decide which users don't rely on these buttons, and migrate those users to Lightning Experience. [Learn More](#)

For users who require these buttons, you can recreate sharing buttons using the AppExchange Component [LightningSharing](#) from Salesforce Labs.

Learn more

- [Sharing Settings](#)
- [Lightning Alternatives to JavaScript Buttons](#)
- [Navigation and Actions: What's Not in Lightning Experience](#)

What's Next?

Congrats! You're now closer to Lightning Experience than ever before. Wondering what's next? Here's how you can use this report to keep the momentum going with Lightning Experience.

- 1 Schedule a consultation with an expert**
To get feedback on your report, register for a free Lightning Experience consultation. [Register](#)
- 2 Select your Lightning Experience champions**
We recommend that you select pilot users from the profiles that we suggest in the next section.
- 3 Preview Lightning Experience**
Remember that Readiness Check hasn't evaluated all of the features in Salesforce. Verify that the features champions use regularly are accessible from Lightning Experience. [Preview](#)
- 4 Enable Lightning Experience for your champions**
Roll out Lightning Experience to your champions only, and show them around the new interface. [Enable Lightning Experience](#)
- 5 Get champion feedback**
Have your champions do their job in Lightning Experience for a week. Then get their feedback about which features aren't ready for showtime yet.
- 6 Make the recommended changes**
Get these features and customizations ready for Lightning Experience by making the recommended changes. Use this report and feedback from your champions to help you prioritize what's used the most.
- 7 Repeat the process**
When you're done making changes, kick off Readiness Check and start over at step 1. Eventually, you'll have made all the modifications necessary to get your users into Lightning Experience. [Evaluate Again](#)

Which Users Are Ready?

Based on the features and customizations we've evaluated, here's where users from each profile stand with Lightning Experience.

Not Quite Ready

Of the features and customizations we've evaluated, these profiles have access to features that require more attention before rolling out Lightning Experience. To get your users ready, make the modifications we suggest in the report and run Readiness Check again.

PROFILE NAME	NUMBER OF USERS	FEATURES THAT NEED ATTENTION
Custom: Sales Profile	1	Custom Button URL, Opportunity Partners, Account Partners, Documents, Campaign Hierarchy, Campaign Members, Solution, Sharing Buttons
System Administrator	1	Custom Button URL, Opportunity Partners, Account Partners, Documents, Campaign Hierarchy, Campaign Members, Solution, Sharing Buttons
Standard Platform User	1	Custom Button URL, Opportunity Partners, Account Partners, Documents, Campaign Hierarchy, Campaign Members, Sharing Buttons

Stay Engaged with Lightning Experience

We're constantly improving Lightning Experience and Readiness Check to make your migration as seamless as possible. To get up-to-date details on where you stand, rerun Readiness Check periodically. Or check out our newly-released features in [Salesforce Release Notes](#) and [Lightning Experience Basics](#).

We'd love to hear how you feel about the Readiness Report. Post your feedback to the [Lightning Now](#) success group with the hashtag #readinessreport.

And if you feel that you need more help with your transition to Lightning Experience, you can always reach out our [Lightning Accredited Consultants](#).

We're excited to be on this journey to Lightning Experience with you, helping your customers love you even more.



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