Salesforce Certified Admin and App Builder

Lesson 22—User Interface

What You'll Learn

- How to set up the General user options

- How to set up the sidebar and calendar options

- Make changes to general setup options

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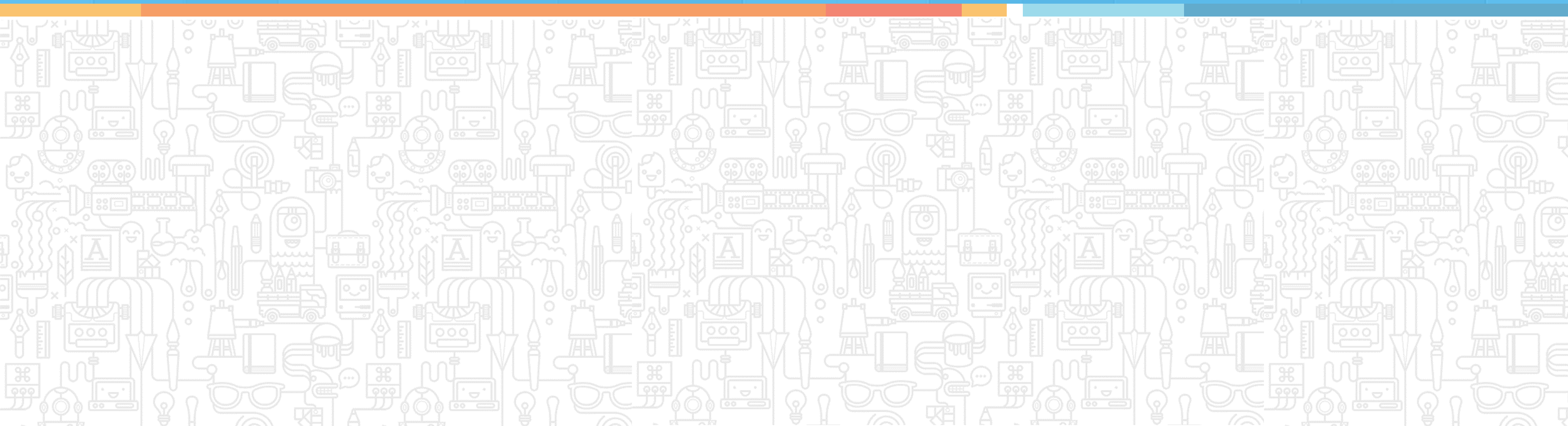
User Interface General Options

Remember the following points when making changes to the

general user interface:

- Some changes may display differently depending on the browser

  being used.

- Saved changes will take effect immediately for users already

  logged in.

- Some of the changes are desirable only when using slower

  internet speeds.

User Interface Sidebar Options

Keep in mind the following points when changing the sidebar options:

- The sidebar can be customized to display on every page.

- Some users prefer to leave the sidebar collapsed.

- Best practice is to enable the collapsible sidebar but leave it un-collapsed.

Sidebar

☐ Enable Collapsible Sidebar

☑ Show Custom Sidebar Components on All Pages

User Interface Calendar Options

Keep in mind the following points when configuring

calendar options:

- Many users have their Salesforce calendars

  syncing to their desktop calendars, such as

  Outlook or Google Calendar.

- Some of the drag-and-drop features perform in

  different browsers in unexpected manner.

- Hover links can sometimes cause inconvenience,

  depending on the amount of changes being made

  to events.

Calendar

- ☐ Enable Home Page Hover Links for Events
- ☑ Enable Drag-and-Drop Editing on Calendar Views
  - ☑ Enable Click-and-Create Events on Calendar Views
    - ☐ Enable Drag-and-Drop Scheduling on List Views
- ☑ Enable Hover Links for My Tasks list

User Interface Name Settings

Remember the following about name settings:

- Data integrations or uploaded processes may be disrupted by changing these settings.

- Middle names are usually not necessary to enable.

- Suffixes are useful when working with a contact list of individuals with several credentials.

Name Settings

☐ Enable Middle Names for Person Names
☐ Enable Name Suffixes for Person Names

User Interface Setup Options

Keep the following points in mind when

configuring setup options:

- These options provide dramatic changes to the

  look and feel of the Setup area

- Use caution when selecting custom object

  truncate and audit field changes.

- Most customers prefer the updated enhanced

  profile and page layout editor.

Setup

☑ Enable Enhanced Page Layout Editor

☑ Enable Enhanced Profile List Views

☐ Enable Enhanced Profile User Interface

☑ Enable Streaming API

Quiz

QUIZ 1

Where is the Tab Organizer option located?

a. User Interface

b. Sidebar Setup

c. Calendar Setup

d. General Setup

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QUIZ 1

Where is the Tab Organizer option located?

a. User Interface

b. Sidebar Setup

c. Calendar Setup

d. General Setup

The correct answer is **a**.

The Tab Organizer is located in the User Interface area in Setup.

QUIZ 2

Where is the Enhanced Page Layout Editor option located?

a. User Interface

b. Sidebar Setup

c. Calendar Setup

d. General Setup

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QUIZ 2

Where is the Enhanced Page Layout Editor option located?

a. User Interface

b. Sidebar Setup

c. Calendar Setup

d. General Setup

The correct answer is **d**.

The Enhanced Page Layout Editor is located in the General Setup area.

QUIZ 3

Where can the 2010 Theme option be found?

a. User Interface

b. Sidebar Setup

c. Calendar Setup

d. General Setup

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QUIZ 3

Where can the 2010 Theme option be found?

a. User Interface

b. Sidebar Setup

c. Calendar Setup

d. General Setup

The correct answer is **a**.

The 2010 Theme option is located in the User Interface area.

QUIZ 4

Where can the Dynamic Streaming Channel Creation option be found?

a.   User Interface

b.   Sidebar Setup

c.   Calendar Setup

d.   General Setup

QUIZ 4

Where can the Dynamic Streaming Channel Creation option be found?

a.   User Interface

b.   Sidebar Setup

c.   Calendar Setup

d.   General Setup

The correct answer is **d**.

Dynamic Streaming Creation is found in the General Setup area.

QUIZ 5

Where can the Enable Hover Details option be located?

a. User Interface

b. Sidebar Setup

c. Calendar Setup

d. General Setup

QUIZ 5

Where can the Enable Hover Details option be located?

a.   User Interface

b.   Sidebar Setup

c.   Calendar Setup

d.   General Setup

The correct answer is **a**.

The Enable Hover Details option is located in User Interface.

Case Study

Case Study

Scenario | Analysis | Solution

United Containers wants to customize the look and feel of Salesforce. There are too many buttons, links, and pop-up windows. This is causing downtime with the sales team and confusion among new users. When a new record page loads, there is a long delay in the loading of related list records. Additionally, salespeople are facing difficulties in scheduling on the calendar and prefer to drag and drop events rather than manually edit each one.

*Click **Analysis** to know the team's next move.*

Case Study

Scenario | **Analysis** | **Solution**

United Containers decided to modify the User Interface settings for the following reasons:

1. The App Builder could change the separate loading of related lists.

2. The App Builder could change the drag-and-drop scheduling on calendars.

3. The App Builder could enable a custom sidebar to be displayed at all times.

Click **Solution** *to know the company's decision.*

Scenario | **Analysis** | **Solution**

The App Builder took the following steps to resolve these issues:

1. Logged into Salesforce and navigated to the User Interface area.

2. Checked the 'enable separate loading of related lists' check box.

3. Checked the 'enable drag and drop of events' check box.

4. Unchecked the 'enable collapsible sidebar' check box.

- Salesforce offers a variety of options to customize the user interface.

- Changes should be made carefully to avoid negatively impacting active users.

- Some setup options should only be used under certain circumstances, such as slow internet availability.

This concludes 'User Interface.'

The next lesson is 'Application Lifecycles.'