

2. CREATING A WAREHOUSE APPLICATION IN SALESFORCE.COM

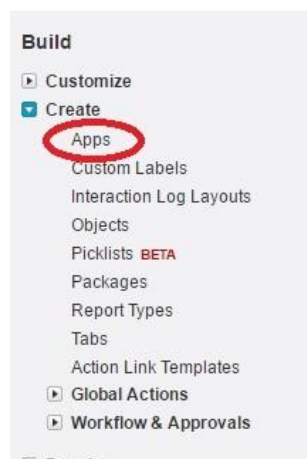
Create an application with the name Warehouse as below:

Go to <https://developer.salesforce.com/signup> and login with your credentials

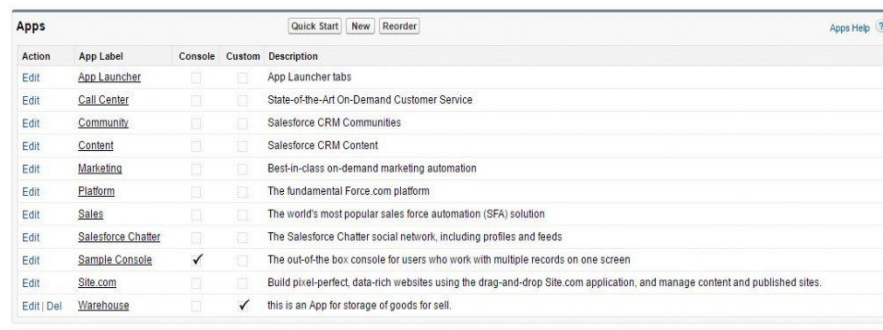
Step 1. Click Setup, right top side in your screen.



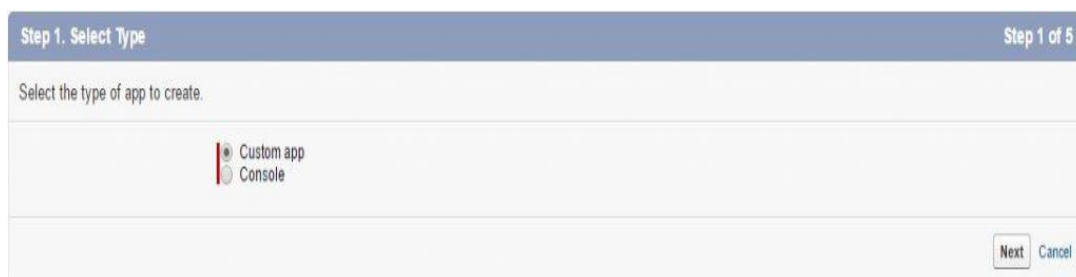
Step 2. Once you're in the Setup area, you'll see the menu on the left side of the page. From that menu, click Create > Apps.



Step 3. Click new button to create a new App.



Step 4. Select the type of an App; here we are selecting a custom app and click Next button



Step 5. Specify a label for an App. The label can have a max of 40 characters, including spaces. This label is an App's name in the Force.com App tab/menu. Optionally, enter a description of an App and Click Next.

The screenshot shows the 'Step 2. Enter the Details' interface for creating a custom app. The header bar indicates 'Step 2 of 5'. Below the header, a prompt says 'Fill in the fields below to define the custom app.' The main section is titled 'Custom App Information' with a red exclamation mark icon and the text 'Required Information'. It contains three input fields: 'App Label' with the value 'Warehouse' and an example 'Example: HRforce, Financeforce, Bugforce'; 'App Name' with the value 'Warehouse' and an information icon; and 'Description' with a text area containing the text 'A place where raw materials or manufactured goods may be stored prior to their distribution for sale - but here we are taking this for logical purpose.' At the bottom right are 'Previous', 'Next', and 'Cancel' buttons.

Step 6. Optionally, specify a custom logo for an App. Click Insert an image to choose an image file from the document library and Click Next.

The screenshot shows the 'Step 3. Choose the Image Source for the Custom App Logo' interface. The header bar indicates 'Step 3 of 5'. Below the header, a prompt says 'Optionally, specify a logo for this custom app. To do so, choose an image file from the document library.' A yellow warning box contains the text: 'The file size of a custom app logo must be smaller than 20 KB. (For comparison, the salesforce.com logo is about 3 KB). To upload an image file, add a new document to the Documents tab. Image dimensions should be a maximum of 300 pixels wide by 55 pixels high for best results. Larger images will be resized and may appear distorted.' Below the warning box is a dashed line with a central button labeled 'Insert an Image'. Below the button is a preview of the Salesforce logo with a blue butterfly icon. At the bottom right are 'Previous', 'Next', and 'Cancel' buttons.

Step 7. Choose the which tabs you want to include with your App and click Next button. Click the Add and Remove arrow buttons to add or remove tabs from the App. Click the up and down arrow buttons to define in which order you want the tabs to display in the App.

Also you can set the default landing tab for your newly created App using the Default Landing Tab drop-down menu below the list of selected tabs. This determines the first tab a user sees when logging into this Salesforce App.

Step 4. Choose the Tabs Step 4 of 5

Choose the tabs to include in this custom app.

Available Tabs

- Price Books
- Accounts
- Campaigns
- Cases
- Contacts
- Contracts
- Dashboards
- Documents
- Forecasts
- Leads
- Opportunities
- Orders
- Products
- Reports

Add

Remove

Selected Tabs

- Home

Up

Down

Default Landing Tab: Home

Step 8. Check the Visible checkbox for choosing the user profile for which you want the App will be available. Check the default box for setting the App as that profile's default App. This means that new users who have the same profile will see this App when they log in for the first time.

Finally, Click Save to finish the wizard and then your application got created successfully.

Ex 2: Create an App named as Merchandise

Merchandise – Using this object we will buy the items into our Warehouse.

In this step you create a Merchandise object and a tab to display it. You then create an app that contains the tab.

1. Your browser should already be open, log into your salesforce account
2. From Setup, enter Objects in the Quick Find box, then select **Objects**.
3. Click **New Custom Object** to display the New Custom Object wizard.
4. For the Label and Plural Label enter Merchandise, leave all other values as they are.

Custom Object Definition Edit [Save] [Save & New] [Cancel]

Custom Object Information * Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label * Merchandise **Example: Account**

Plural Label * Merchandise **Example: Accounts**

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name * Merchandise **Example: Account**

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name --None--

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name * Merchandise Name **Example: Account Name**

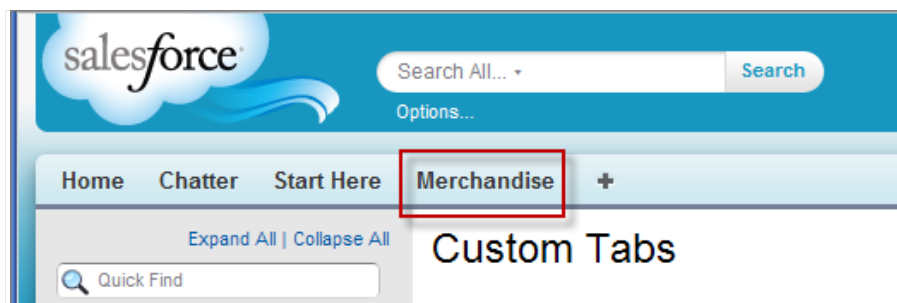
Data Type * Text

5. Click **Save** to finish creating your new object.

To display information about the Merchandise object, you associate the object with a tab.

1. From Setup, enter Tabs in the Quick Find box, then select **Tabs**.
2. In the Custom Objects Tabs related list, click **New** to launch the New Custom Tab wizard.
3. From the Object drop-down list, select Merchandise.
4. For the Tab Style, click the lookup icon and choose an icon.
5. Accept the remaining defaults, and click **Next**, **Next**, and then **Save**.

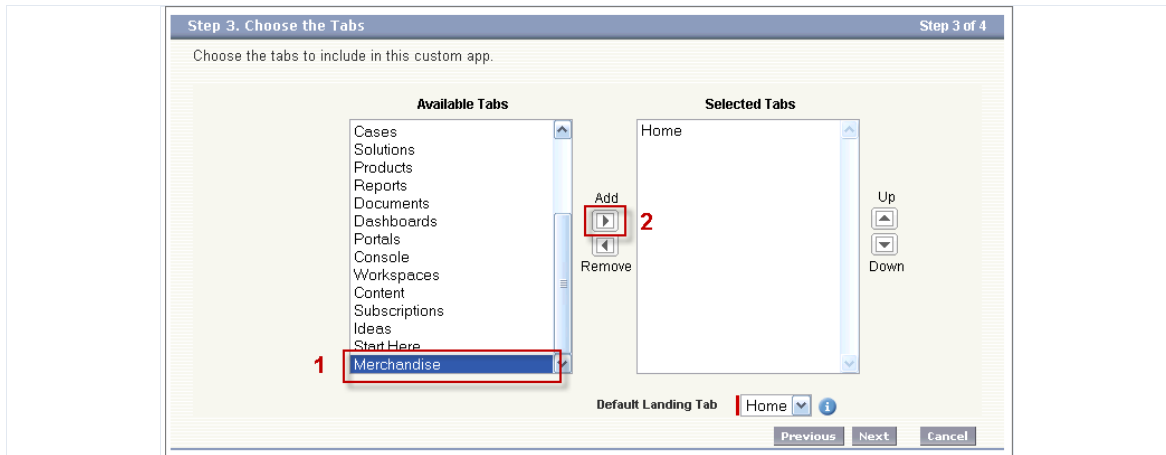
As soon as you create the tab, you can see it at the top of the screen.



Next create an app that contains the tab.

1. From Setup, enter Apps in the Quick Find box, then select **Apps**.
2. Click **New** to launch the New Custom App wizard.
3. For the App Label and App Name enter Warehouse.
4. Click **Next** and **Next** again.

5. In the Available Tabs list, locate the Merchandise tab and click **Add** to add it to the list of selected tabs.



6. Leave the Default Landing Tab set to the Home tab, and click **Next**.
7. Select the Visible checkbox to make the application available to all user profiles.
8. Click **Save** to create the Warehouse application.
9. The app now appears in the Force.com app menu in the upper right corner of the page. Click it.

