

Sales force Development: Application Essentials

Lesson 6: Building Your User Interface

salesforce

global strategic
consulting partner



6.2: Building applications on Force.com platform

Application Building Blocks

Applications
Tabs
Page Layouts
Record Types



User Interface

- Force.com Pages
- Web controls
- Sites



- Workflow
- Validation Rules
- Approval Processes



Business Logic

- Force.com Page Controllers
- Force.com code
- Web Services API



- Objects
- Fields
- Relationships



Data Model

- Web Services API
- Metadata API



Declarative

Programmatic

Simplicity + Speed

Control + Flexibility

Lesson Objectives

By the end of this lesson, you will be able to:

- Create custom application with a custom logo
- Create custom object tab
- Modify a page layout
- List the customizations possible on a page layout
- List customizations that are not permitted on a page layout
- Describe the limitations of field attributes set exclusively on the page layout
- Set a default landing page for a custom application

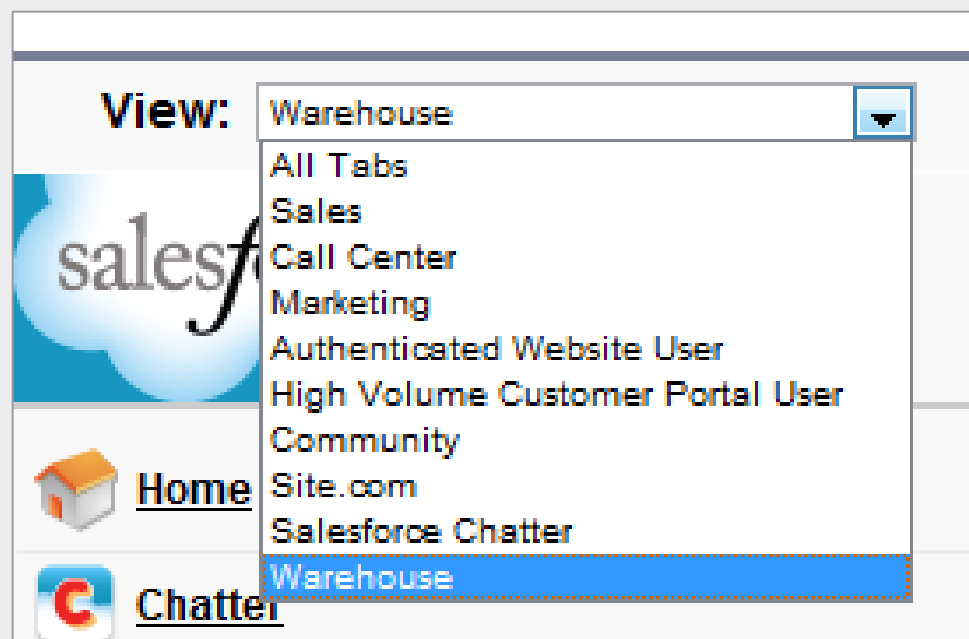
6.1: Create Applications and Custom Tabs

Create Applications and Custom Tabs

An application is a logical container for all of the objects, tabs, processes and services associated with a given business functions

A Force.com custom app consists of a name, a description, an ordered list of tabs, and, optionally, a custom logo and a landing page

Salesforce provides standard apps such as Sales and Call center



6.1: Create Applications and Custom Tabs

Custom Apps

Custom app logos

- Custom applications display the Customforce logo by default
- For custom logos, any GIF or JPG file from the Documents tab can be inserted if it is under 20kb in size

Specify a custom default landing tab when creating or editing a custom app.

- Use the Default Landing Tab drop-down menu below the tab selection area of the app creation wizard

Lab : Creating a Custom application



6.1: Create Applications and Custom Tabs Custom Tabs

A custom tab is a user interface component you create to display custom object data or other web content embedded in the application

There are three types of custom tabs:

- Custom Object Tabs: display the data of your custom object in a user interface tab
- Web Tabs: Display any external web-based application or web page in a user interface tab
- Visualforce Tabs: display a Visualforce page in a user interface tab

Custom tabs will have a Tab Style

Lab 6: Creating a Custom Tabs for:

- Position Object
- Job Application Object



6.2: Custom Page Layouts

Page Layouts

Page Layout defines the organization of:

- Fields
- Custom links
- Related lists on an object detail page

- Page Layout customizations include:
 - Field locations
 - Page section customization
 - Field properties (visible, read-only and required)

- Note: Establish unique layouts for different business scenarios. Use Visualforce pages to customize beyond the Salesforce look and feel

The screenshot shows a Salesforce page for a 'Merchandise' record named 'Wee Jet'. The page has a header with the record name and a heart icon. Below the header are links for 'Customize Page', 'Edit Layout', 'Printable View', and 'Help for this Page'. There are also buttons for 'Show Feed' and 'Follow'. The main content area is titled 'Merchandise Detail' and contains a table with the following information:

Merchandise Name	Wee Jet	Owner	vaishali.kunchur [Change]
Description	A small plane		
Price	\$9.99		
Total Inventory	2,000		
Created By	vaishali.kunchur, 10/30/2012 1:50 AM		Last Modified By: vaishali.kunchur, 10/30/2012 1:50 AM

At the bottom of the table, there are 'Edit', 'Delete', and 'Clone' buttons.

6.2: Custom Page Layouts Enhanced Page Layout Editor

The screenshot shows the Salesforce Enhanced Page Layout Editor for a 'Merchandise Layout'. The interface includes a top toolbar with 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. A 'Quick Find' bar is also present. The left sidebar shows a tree view with 'Fields', 'Buttons', and 'Related Lists'. The main area displays a 'Merchandise Sample' layout with a 'Highlights Panel' and a 'Merchandise Detail' section. The 'Merchandise Detail' section includes 'Standard Buttons' (Edit, Delete, Clone, Sharing) and 'Custom Buttons'. The bottom of the page shows a preview of the layout with fields like 'Merchandise Name' and 'Description'.

Annotations:

- Switch to other layouts:** Points to the 'Merchandise Layout' dropdown menu.
- Copy layouts faster with Save as:** Points to the 'Save' button.
- Add blank spaces to align fields, or add impact:** Points to the 'Blank Space' option in the 'Fields' list.
- Video tutorial:** Points to the 'Video Tutorial' link in the top right.
- Drag and drop page elements to add them to the layout:** Points to the 'Highlights Panel' area.
- Manage standard and custom buttons:** Points to the 'Standard Buttons' and 'Custom Buttons' sections.

Lab : Customizing Page Layouts



6.3: Compact Page Layout Compact Layouts

Compact layouts are used to display a record's key fields at a glance. These layouts were designed with touchscreen mobile devices where space is limited and users need to find important information quickly. We can customize which fields appear in the highlights by customizing that object's compact layout.

If we don't create one, Salesforce1 will use a read-only, predefined system default compact layout.

For custom objects, this system default includes the record's name. In the case of our Position object, the system default compact layout displays Position Title.

Lab : Compact Page Layouts



Summary

In this lesson, you have learnt:
Create Applications and Custom Tab
Customizing Page Layouts



Review Question

Question 1: When building a custom application, developers can include a custom logo for that app

True or False

Question 2: When choosing a style for a custom object tab, developers can create custom styles.

True or False

Question 3: List things that can be customized on a page layout.

