BUILDING APPLICATIONS WITH FORCE.COM - PART 1 (BUILDING YOUR USER INTERFACE)

Exercise Guide

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3-1: Create a Custom Application

Scenario:

Now that Universal Containers has created some new objects and their associated tabs, the company would like to create a simplified way to access all the tabs with a single click.

Goal:

Create a custom recruiting application.

Task:

Create a custom recruiting application.

Time:

5 minutes

Instructions:

1. Create a custom recruiting application.
   A. Click **Setup | Create | Apps**.
   B. Click **New**.
      i. **App Label**: `Recruiting`
      ii. **App Name**: `Recruiting` (This field auto-populates.)
   C. Click **Next**.
   D. Click **Insert an Image**.
      i. **File Location**: `Corporate Graphics`
      ii. Click the link for the **Universal containers.GIF** file.
   E. Click **Next**.
   F. Hold **CTRL** and select `Documents`, `Dashboards`, `Reports`, `Offers`, `Candidates`, `Job Applications`, `Reviews`, `Interviewers`, and `Job Posting Sites` from the Available Tabs list.
      i. Click **Add** to move selected items to the Selected Tabs list.
      ii. Set the Default Landing tab to `Home`.
   G. Click **Next**.
   H. Make the app visible to the Custom-Executive, Custom-HR, and System Administrator profiles by checking the `Visible` checkbox on the correct profiles.
   I. Click **Save**.

3-2: Create Custom Tabs

Scenario:

Universal Containers wants to make sure that users will be able to easily access the new custom objects it has created. The company needs to create new custom tabs that will quickly guide people to this information.

Goal:

Create a custom tabs for the Positions and Job Postings objects.

Tasks:

1. Create a custom tab for the Positions object.
2. Create a custom tab for the Job Postings object.
3. Reorder the tabs for your user account.

Time:

5 minutes

Instructions:

1. Create a custom tab for the Positions object.
   A. Click **Setup | Create | Tabs**.
   B. In the Custom Object Tabs section, click **New**.
   C. Enter the following details:
      i. **Object**: `Position`
      ii. **Tab Style**: `Desk`
      iii. **Splash Page Custom Link**: (leave as `--None--`)
   D. Click **Next**.
   E. Add to Profiles.
      i. Select the `Apply one tab visibility to all profiles: Default Off` radio button.
      ii. Select the `Apply a different tab visibility for each profile` radio button.
      iii. Select `Default On` for the Custom-Executive, Custom-HR, and System Admin profiles.
      iv. Click **Next**.
   F. Add to Custom Apps.
      i. Deselect all applications except the `Recruiting` application.
      ii. Select the `Append tab to users' existing personal customizations`

checkbox.
    iii. Click **Save**.

2. Create a custom tab for the Job Postings object.
    A. In the Custom Object Tabs section, click **New**.
    B. Enter the following details:
        i. **Object**: `Job Posting`
        ii. **Tab Style**: `Building Block`
        iii. **Splash Page Custom Link**: (leave as `--None--`)
    C. Click **Next**.
    D. Add to Profiles.
        i. Select the `Apply one tab visibility to all profiles: Default Off` radio button.
        ii. Select the `Apply a different tab visibility for each profile` radio button.
        iii. Select `Default On` for the Custom-Executive, Custom-HR, and System Admin profiles.
        iv. Click **Next**.
    E. Add to Custom Apps.
        i. Deselect all applications except the `Recruiting` application.
        ii. Select the `Append tab to users' existing personal customizations` checkbox.
        iii. Click **Save**.

3. Reorder the tabs for your user account.
    A. Select the `Recruiting` app from the **Force.com App** menu in the upper right-hand corner.
    B. Click **All Tabs (+)**.
    C. Click **Customize My Tabs**.
    D. Make the Positions tab appear just to the right of the Home tab.
        i. Click **Positions** under Selected Tabs.
        ii. Use the **Up** arrow to move it to just under the Home tab.

            Note: Moving a tab up in the list moves it farther to the left in the Salesforce user interface. Moving a tab down in the list moves it farther to the right.

        iii. Click **Save**.

3-3: Customize Page Layouts

Scenario:

Universal Containers wants to make sure that the newly created fields are displayed in a logical order on the page. The fields should be arranged according to the chart below.

Goal:

Create a page layout for the Position object.

Section Name	Fields	
Information	Title	Owner
	Type	Priority
	Department	Status
	Location	Sub-Status
	Pay Grade	Date Opened
	Hiring Manager	Date Closed
	Duration	Start Date
	Legacy Position Number	
Description	Job Description	
	Education	
	Responsibilities	
System Information	Created By	Last Modified By

Tasks:

1. Arrange existing fields in the Position Page Layout.
2. Create a new section and add fields for Description on the Position Page Layout.
3. Set the Status field to be required and add Position History to the Related Lists area.
4. Test your changes.

Time:

10 minutes

Instructions:

1. Arrange the fields within the sections as noted in the table.
   A. Click **Setup | Create | Objects | Position**.
   B. In the Page Layouts related list, click the **Edit** link next to the Position Layout.
   C. Arrange the fields in the Information section according to the chart.

Section Name	Fields	
Information	Title	Owner
	Type	Priority
	Department	Status
	Location	Sub-Status
	Pay Grade	Date Opened
	Hiring Manager	Date Closed
	Duration	Start Date
	Legacy Position Number	

2. Create a new section for Description.
   A. Drag **Section** from the palette to below the Information section.
      i. **Section Name**: `Description`
      ii. **Layout**: `1-Column`
      iii. Click **OK**.
   B. Drag the **Job Description**, **Education**, and **Responsibilities** fields from the Information section into the Description section according to the chart.

Section Name	Fields
Description	Job Description
	Education
	Responsibilities

3. Set the **Status** field to be required and add Position History to the Related Lists area.
   A. Double-click the **Status** field and select the `Required` checkbox.
   B. Click **OK**.
   C. Add Position History to the Related Lists area.
      i. On the palette, click **Related Lists**.

ii. Click and drag **Position History** to the bottom of the Related Lists area.
iii. Click **Save**.

D. Click **Yes** to override the personal related list customizations.

4. Test these changes by clicking the Positions tab in the Recruiting application and adding a new position.

3-4: Enable Chatter on the Position Object

Scenario:

Universal Containers wants to make sure that users can easily see updates made to position records they follow.

Goal:

Enable Chatter on the Position object.

Tasks:

1. Enable Chatter Feed Tracking on the Position object.
2. Modify a Position record to test feed tracking**.**

Time:

5 minutes

Instructions:

1. Enable Chatter Feed Tracking on the Positions object.
   A. Click **Setup | Customize | Chatter | Feed Tracking**.
   B. Select the Position object.
   C. Click **Enable Feed Tracking**.
   D. Select `Location`, `Owner`, `Status`, `Title`, `Sub-Status`, and `Type` and click **Save**.
2. Modify a position record to test feed tracking.
   A. Navigate to the position record you created in the previous exercise.
   B. Modify the **Status** field.
   C. Does the update show in the record's chatter feed?

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3-5: Create an Object-Specific Quick Action

Scenario:

Universal Containers would like a simple and quick way to create a job application for a candidate from the candidate record. You need to create an object-specific quick action to accomplish this.

Goal:

Create an object-specific quick action.

Tasks:

1. Create an object-specific quick action to create a job application from a candidate record.
2. Customize the action's layout.
3. Set the predefined field value.
4. Add the action to the Candidate page layout.
5. Test the new action.

Time:

10 minutes

Instructions:

1. Create an object-specific quick action to create a job application from a candidate record.
    A. Select **Setup | Create | Objects | Candidate**.
    B. Click **New Action** from the Buttons, Links, and Actions list.
    C. Select `Create a Record` as the action type.
    D. Select `Job Application` as the target object.
    E. Enter `New Job App` as the label for the action. This is the name users see for the action in the publisher menu. The **Name** field auto-populates.
    F. Enter `Action to create a Job Application from a Candidate record` as the Description. This description is not visible to users.
    G. Click **Save**.
2. Customize the action's page layout.
    A. Add the **Position** field to the layout.
    B. Click **Save**.
3. Set the predefined field value.
    A. Click **New** in the Predefined Field Values list on the action detail page.

B. Select the **Stage** field from the **Field Name** picklist.
C. Select **New** from the **A specific value** picklist.
D. Click **Save**.

4. Add the action to the Candidate page layout.

A. Select **Setup | Create | Objects | Candidate**.
B. Click **Edit** on the Candidate Layout.
C. Under Quick Actions in the Publisher, click the **override the global publisher layout** link.
D. Select `Quick Actions` from the Page Layout editor.
E. Drag the New Job App action to the Quick Actions in the Publisher section of the page layout. Place it after Post and File.
F. Click **Save**.

5. Test the new action.

A. Navigate to the Candidates tab and create a new candidate record.
B. Is the New Job App action listed on the newly created candidate record?

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C. Click the **New Job App** action.
D. Select an available position and click **Create**.
E. Navigate to the Job Applications tab and click **GO!**
F. Is the job application you created listed?

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3-6: Create a Global Quick Action and a Global Layout for HR

Scenario:

Universal Containers would like a simple way for Human Resources and Recruiters to add new candidates. You need to create a global quick action and a separate global layout to accomplish this.

Goal:

Create a global quick action to create a candidate record and make it only available to Human Resources.

Tasks:

1. Create a global quick action to create a new candidate record.
2. Create a Human Resources specific global layout.
3. Add the Candidate action to the HR global layout.
4. Assign the HR global layout to the Custom-HR profile.
5. Test the new action.

Time:

10 minutes

Instructions:

1. Create a global quick action to create a new candidate record.
   A. Select **Setup | Create | Global Actions | Actions**.
   B. Click **New Action**.
   C. Select `Create a Record` as the action type.
   D. Select `Candidate` as the target object.
   E. Enter `New Candidate` as the label for the action. This is the name users see for the action in the publisher menu. The **Name** field auto-populates.
   F. Enter `Action to create a new candidate record` as the Description. This description is not visible to users.
   G. Click **Save**.
   H. Add these fields to the Action layout:

      Left Column

      - First Name
      - Phone
      - Education
      - Currently Employed?

      Right Column

      - Last Name
      - Email
      - Years of Experience
      - Current Employer

   I. Click **Save**.

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2. Create a Human Resources specific global layout.
   A. Select **Setup | Create | Global Actions | Publisher Layouts**.
   B. Click **New**.
   C. Select Global Layout as the Existing Publisher Layout and type `HR Layout` as the Publisher Layout Name.
   D. Click **Save**.
3. Add the Candidate action to the HR global layout.
   A. Drag the New Candidate action from the palette and move it to the right of the File action in the Quick Actions in the Publisher layout.
   B. Drag unwanted actions back to the palette, so that the remaining actions are listed as: Post, File, New Candidate, New Task, New Contact, Link, Poll
   C. Click **Save**.
4. Assign the HR global action page layout to the Custom-HR profile.
   A. Click **Publisher Layout Assignment**.
   B. Click **Edit Assignment**.
   C. Select the `Custom-HR` profile.
   D. Select `HR Layout` from the **Publisher Layout to Use** picklist.
   E. Click **Save**.
5. Test the new action.
   A. Select **Setup | Manage Users | Users**.
   B. Click **Login** next to Phil Katz to log in as him.
   C. Navigate to the Home tab.
   D. Is the New Candidate action listed?

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   E. Click **New Candidate**.
   F. Enter this information:
      i. **First Name**: `Test`
      ii. **Last Name**: `Candidate`
      iii. **Phone**: `555-555-1234`
      iv. **Email**: `test@uctest.com`
      v. **Education**: `BA/BS`
      vi. **Years of Experience**: `3`
      vii. **Currently Employed**: `Yes` (checked)
      viii. **Current Employer**: `Test`
   G. Click **Create**.
   H. Click the Candidates tab, select `All` from the **View** picklist, and click **Go!**
   I. Verify that the new candidate exists.

J. Select **Phil Katz | Logout** to log out as Phil Katz.

