

Tabs

What is Tab : A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types of Tabs:

1. **Custom Tabs**

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. **Web Tabs**

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

3. **Visualforce Tabs**

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

4. **Lightning Component Tabs**

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

5. **Lightning Page Tabs**

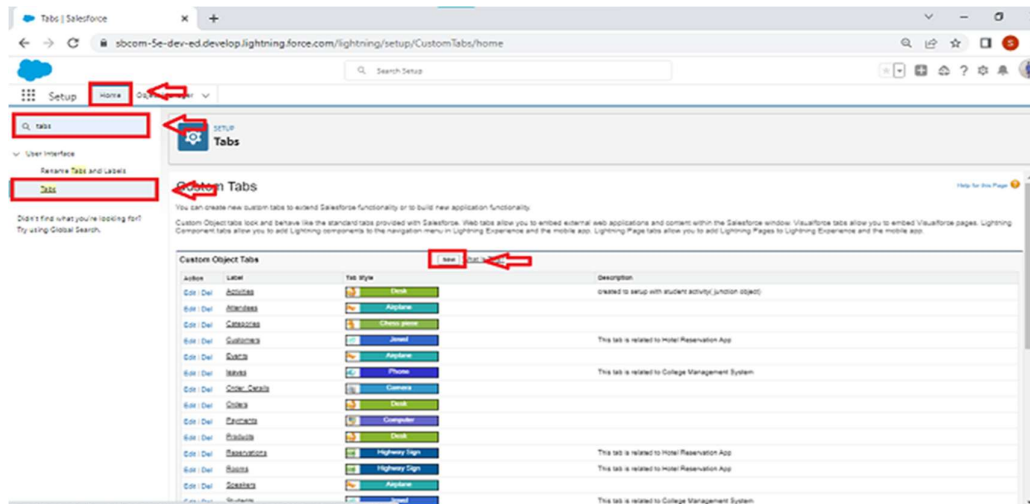
Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customise the tabs for your apps.

Creating a Custom Tab

To create a Tab:(Customer Details)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)



2. Select Object(Customer Details) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

New Custom Object Tab

Help for this Page

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object

Tab Style

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link

Enter a short description.

Description

Next Cancel

Tab Style Selector

Create your own style

Hide styles which are used on other tabs

Airplane

Alarm clock

Apple

Balls

Bank[1]

Bell

Big top

Boat[1]

Books

Bottle

Box

Bridge

Building

Building Block

Caduceus

Camera

Can

Car

Castle

CD/DVD

Cell phone

Chalkboard

Chess piece

Chip

Circle

Compass

Computer

Credit card

CRT TV

Cup

Desk[1]

Diamond

Dice

Factory

Fan

Flag

Form

Gears

Globe

Guitar

Hammer

Hands

Handsaw

Headset

Heart[1]

Helicopter

Hexagon

Highway Sign

Hot Air Balloon

Insect

IP Phone

Jewel

Keys

Laptop

Leaf

Lightning

Save

Cancel

Step 3. Add to Custom Apps

Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App

Platform (standard__Platform)

☐

Sales (standard__Sales)

☐

Service (standard__Service)

☐

Marketing (standard__Marketing)

☐

Sample Console (standard__ServiceConsole)

☐

High Volume Customer Portal User

☐

Authenticated Website User

☐

App Launcher (standard__AppLauncher)

☐

Analytics Studio (standard__Insights)

☐

Sales Console (standard__LightningSalesConsole)

☐

Service Console (standard__LightningService)

☐

Sales (standard__LightningSales)

☐

Lightning Usage App (standard__LightningInstrumentation)

☐

Digital Experiences (standard__SalesforceCMS)

☐

Queue Management (standard__QueueManagement)

☐

Bolt Solutions (standard__LightningBolt)

☐

Data Manager (standard__DataManager)

☐

Salesforce Scheduler Setup (standard__LightningScheduler)

☐

☒ Append tab to users' existing personal customizations

Previous

Save

Cancel

Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “ Appointments, Service records,Billing details and feedback”.
2. Follow the same steps as mentioned in Activity -1 .