

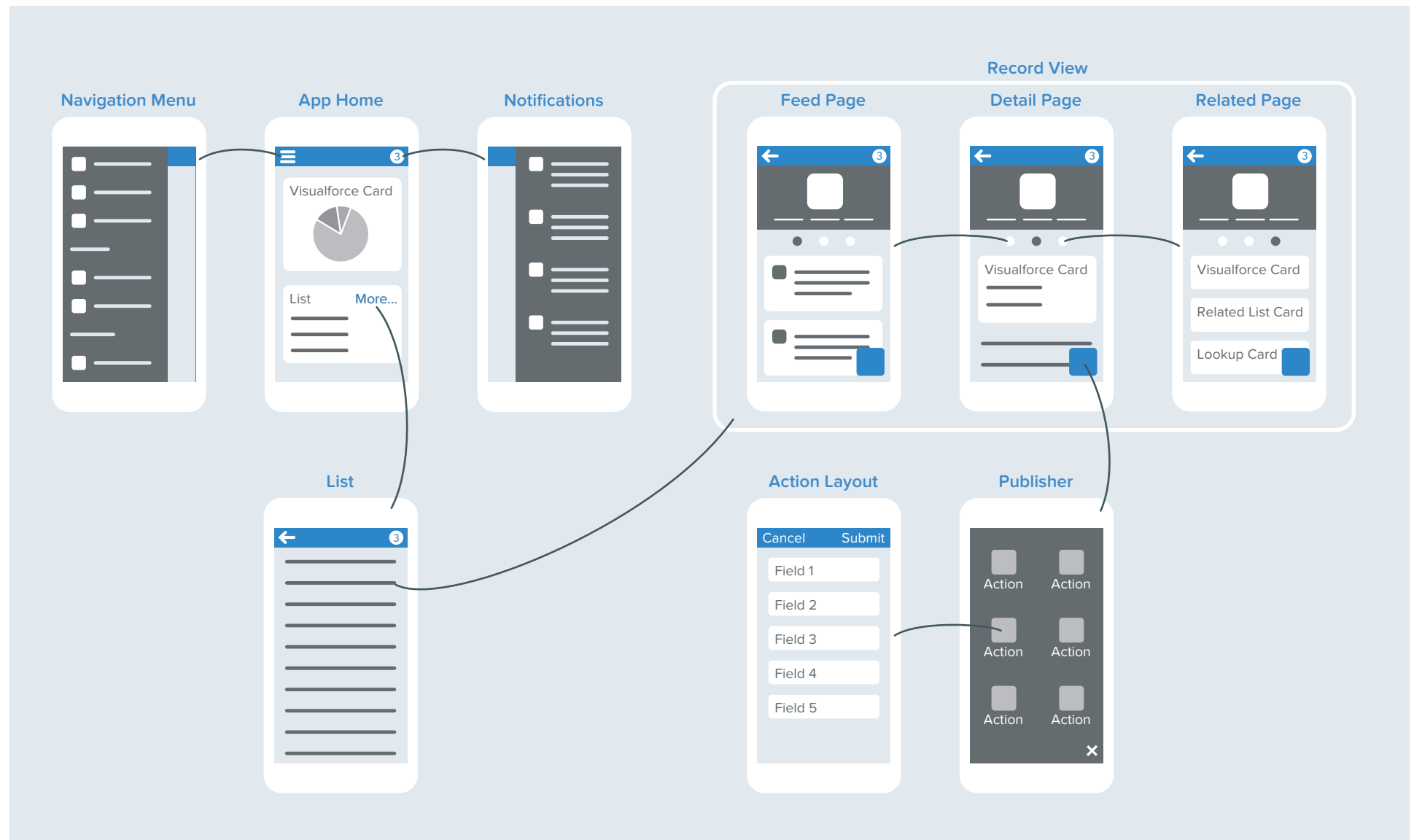
Salesforce1 App Guidelines

About this document

This document is for Salesforce.com customers and partners who want to build an app, action or other custom integration on the Salesforce1 platform. This guide focuses on user interface behaviors and includes best practices, as well as interaction & visual guidelines to ensure design consistency across all Salesforce1 partner integrations.

Terminology

This document will refer to various parts of the Salesforce1 user interface and their intended behaviors. Here are some of the terms that will be used in this document.



Integration Options

There are a number of ways to add new functionality into Salesforce 1. These methods can be used individually, or in any combination. Each will be discussed in more detail in the subsequent pages.

- Custom Objects
- Record View - Cards
- Record View - Standard Actions
- Navigation Menu Apps
- Publisher Actions

Custom Objects

Custom Objects are the simplest Salesforce1 integration point. Any object associated with a Salesforce1 app will be available to users within Salesforce1 (as long as the users have permission to see it).

When to use:

- You need to store data in Salesforce
- You want to attach your data to a parent record in Salesforce (e.g. - Accounts, Contact, Opportunities)
- You have limited development resources

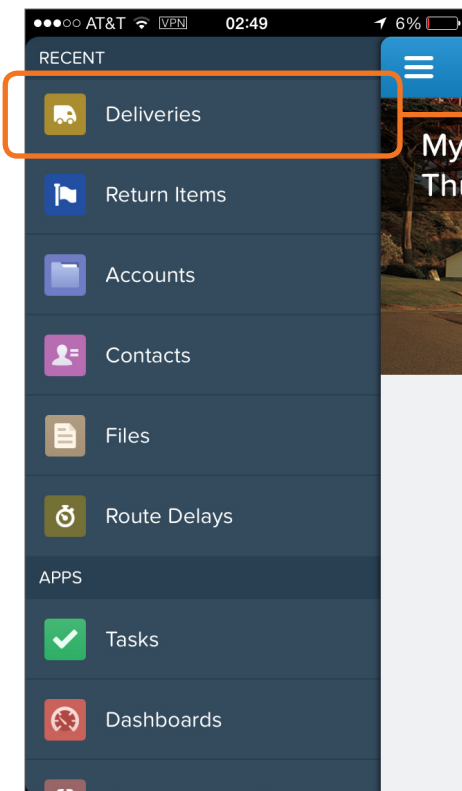
What you get, out of the box:

- Navigation Menu presence in Recent section, based on Search activity (for the initial Salesforce1 release this may change over time).
- Related List Cards
 - Custom objects can appear as related cards on parent objects
- Ability to add custom cards (Visualforce, Lookup, Related) to the Related View of the record..

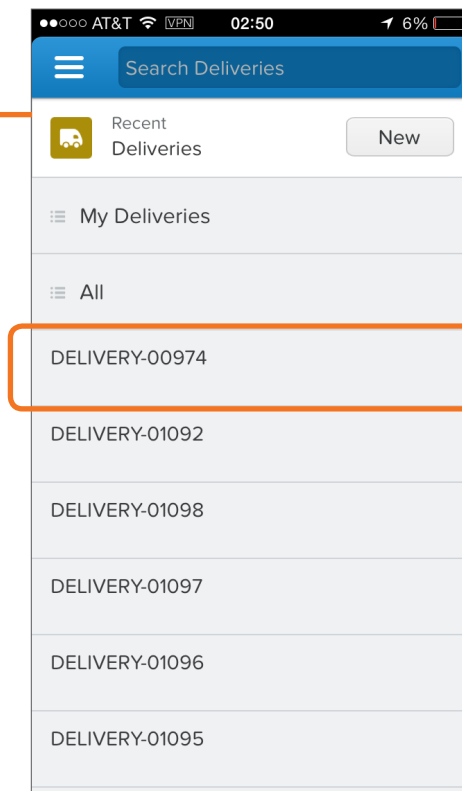
Implementation Effort: Low

Every custom object that is a part of an app, or is available in your org can appear in the Recent section.

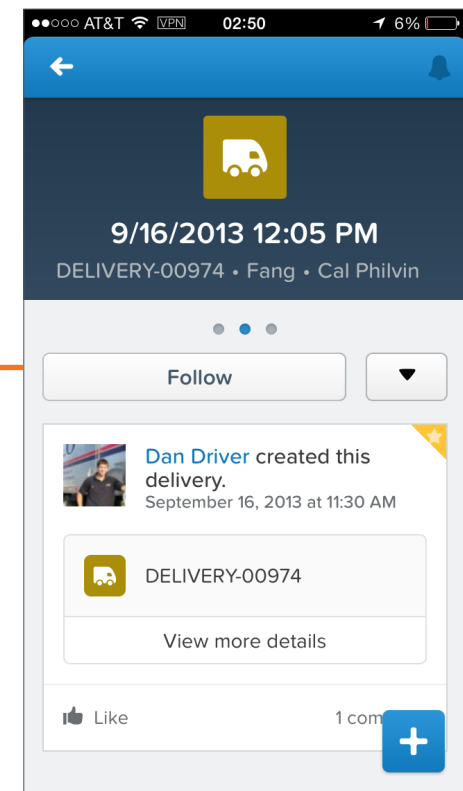
MAIN NAVIGATION



LIST VIEW



RECORD VIEW



Record View - Cards

Cards can be added to the Detail and Related Pages of a Record View. They can provide additional data or summaries for the selected record.

When to use:

- You want to enhance an existing record with complementary data
- You want to customize the Detail or Related Pages within the Record View.

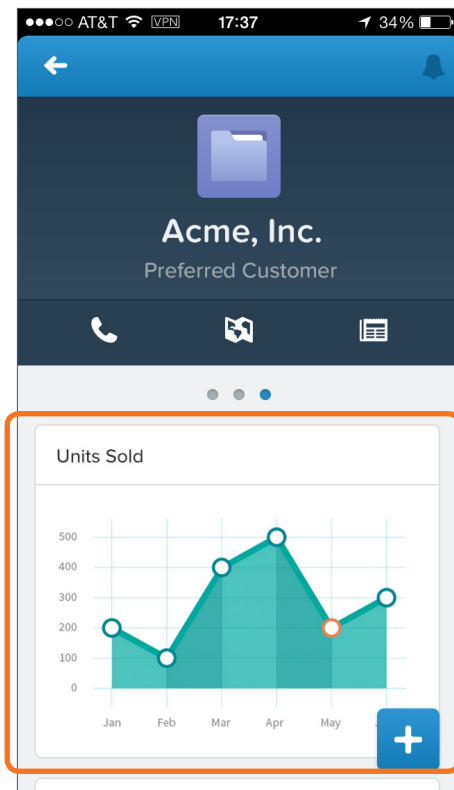
What you get, out of the box:

- Lookup Cards
 - Contents will be rendered by the Salesforce1 framework.
- Related List Cards
 - Contents will be rendered by the Salesforce1 framework.
- Visualforce Cards
 - Only the surrounding frame is provided by the framework, you have complete control of the HTML within the card.

Implementation Effort: Low-High

Implementation effort is low for Lookup and Related List cards but High for cards that draw from a range of sources or provide visualizations.

CARD ON A RELATED PAGE



EXAMPLE CARDS

This block displays several example cards that can be added to a record view:

- Work Info:** A card showing contact and location information for a 'Director, Software Engineering'. It includes an email address (alicia.burton@acme.com), work, mobile, and fax phone numbers, a map of a location in San Francisco, and a manager's name (Betty Jones).
- Followers:** A card displaying a grid of profile pictures of users who follow the record, with a 'More' link to view additional followers.
- Location Card:** A card showing a specific location with a map, address (One Market Street, Ste 300, San Francisco, California 94105), and a manager's name (Betty Jones).
- Document Card:** A card showing a document titled 'Q4 First Call Template' by Nathan Ericson, with a file size of 23MB and a PDF icon.
- Activity Card:** A card showing a post from 'Green Dot Media Product Demo' at 10am, 1 hour ago, with a location in San Francisco and a list of users who interacted with it.
- Top Influencer:** A card showing a progress bar and statistics for a top influencer: 942 Posts, 803 Likes, and 716 Thanks.

Record View - Standard Actions

Standard actions appear in the Detail Page of the Record View. If there are too many standard actions to display in a single row (based on the device's screen size), the excess actions will be put into the Overflow Menu.

When to use:

- You want to trigger a complex flow based on a specific record
- You have a flow that requires an external app or website to function.

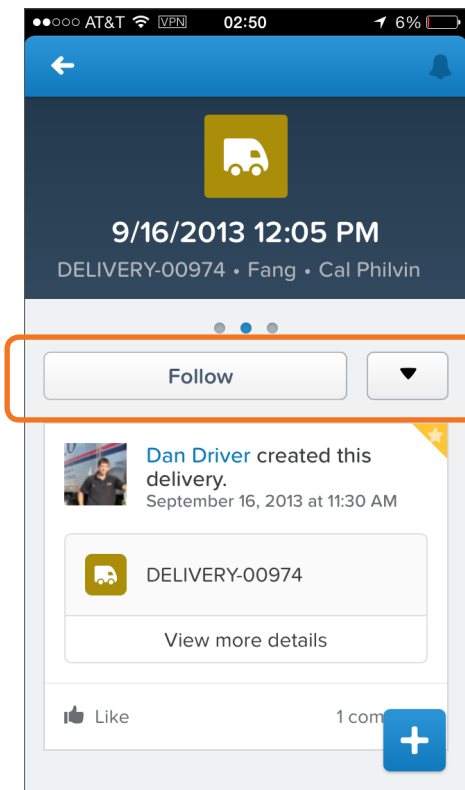
What you get, out of the box:

- Automatic button positioning.
- Action Page Header
 - The Visualforce page for the action will have a simple header that contains a Back arrow and notification indicator.
- Complete control of the HTML & CSS within the body of the page.

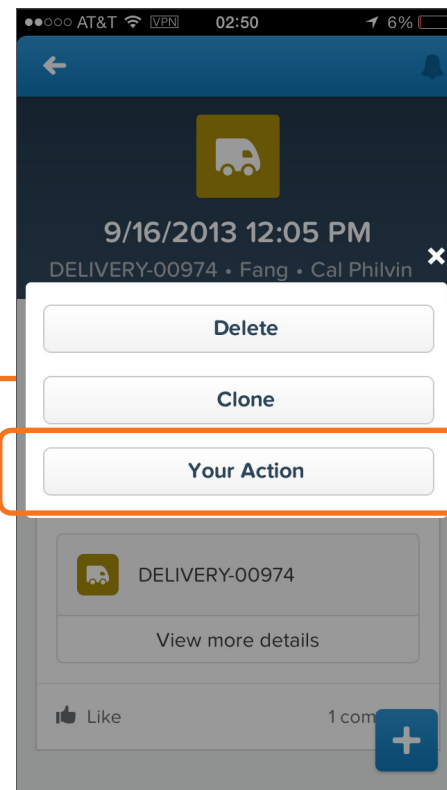
Implementation Effort: Medium to High

The developer is completely responsible for the contents of the action's Visualforce page including HTML & CSS. The depth of functionality is up to the developer.

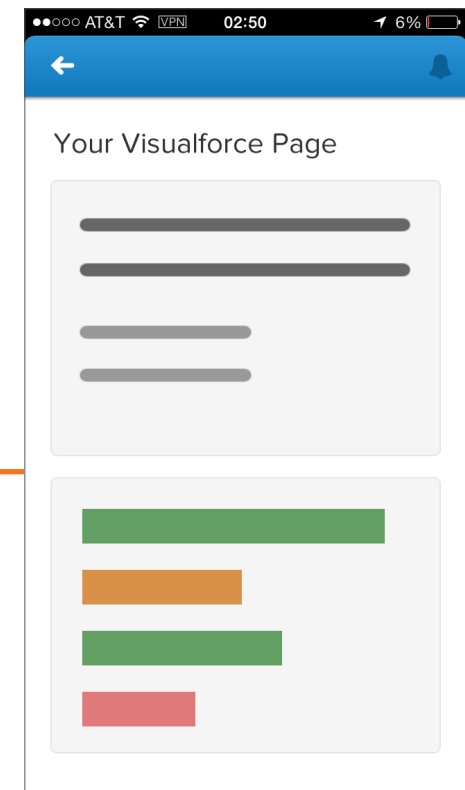
STANDARD ACTION & OVERFLOW



OVERFLOW MENU



ACTION PAGE




Apps

Apps are the most visible Salesforce1 integration point. They are shown within the Navigation Menu (subject to Admin control).

When to use:

You need a global hub that provides rich information across objects.

What you get, out of the box:

- Flexible Page Apps (recommended)
 - Use Salesforce1 components and CSS, no styling required.
 - The Publisher button ( icon) can appear on the Flexible Page if publisher actions are defined within the XML.
 - Low implementation effort, simple to define using XML.

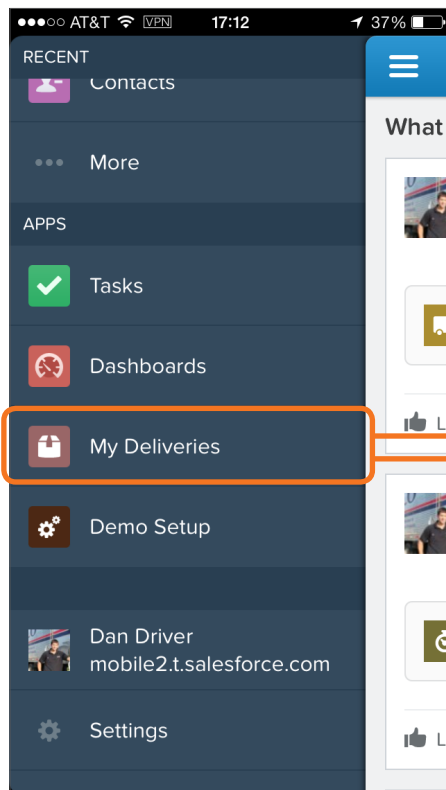
- Visualforce Apps

- Complete control over the page layout, but you are responsible for visual appearance (which should comply with Salesforce1 visual standards)
- The Publisher button is not available.
- High implementation effort

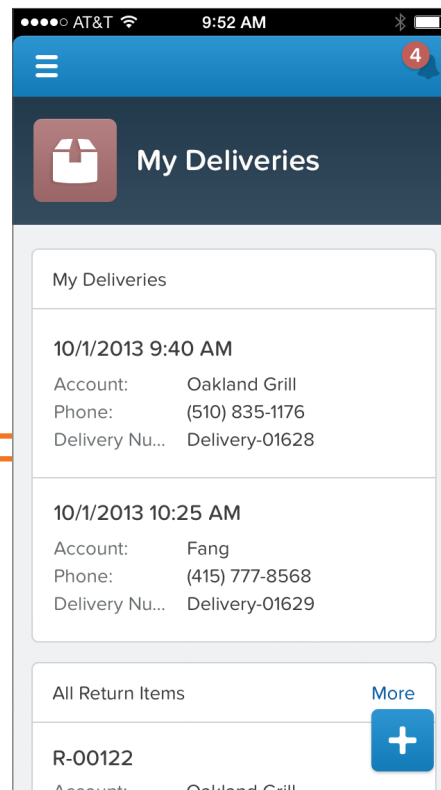
Implementation Effort: Low to High

Flexible Page apps are simple to construct. Visualforce apps take significantly more effort, depending on the complexity of your app.

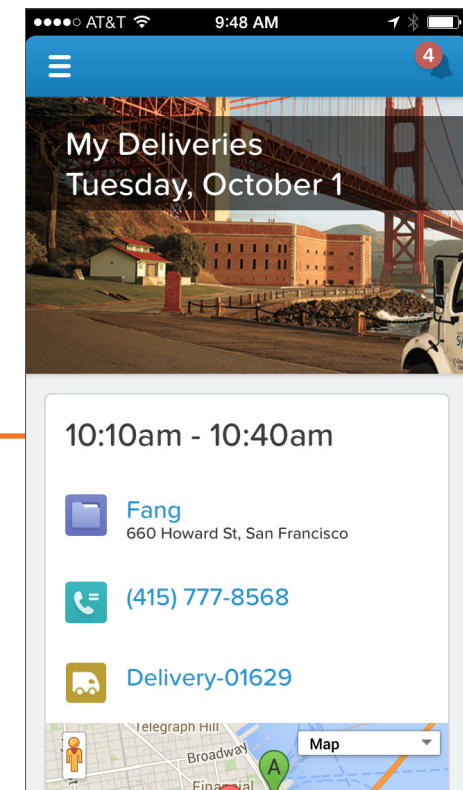
NAVIGATION MENU



FLEXIBLE PAGE APP



VISUALFORCE APP



Best Practices for Visualforce Apps

Keep it simple

- Homepages should be a single page that surface relevant data.
- Anchor elements should be clearly differentiated from the content.
- Anchors can include your logo and/or app name.
- Your app can serve as a launchpad to records in Salesforce, or other Visualforce pages.

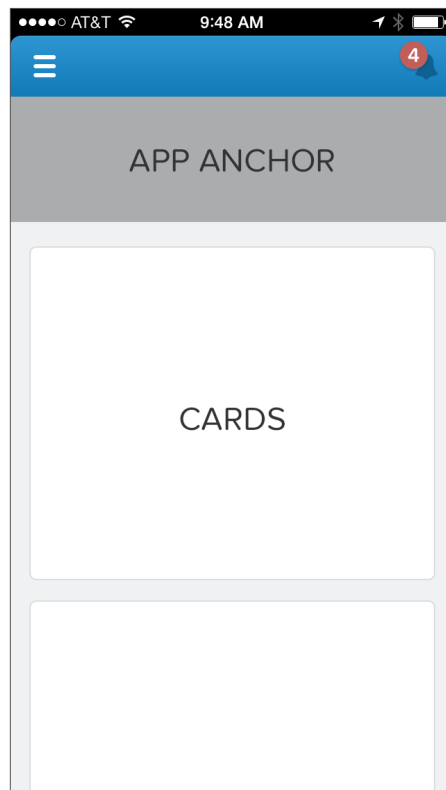
Use Cards

- All content should be contained in cards.
- When possible, visualize data.

Avoid

- Creating a list of lists. Bring summaries of content forward.
- Do not visually emulate standard record homepages, or include a carousel to swipe through content.


VISUALFORCE HOME STRUCTURE



VISUALFORCE HOME EXAMPLE



Publisher Actions

Publisher actions are used to perform a function on the Salesforce platform. Actions are accessed by tapping the  button.

When to use:

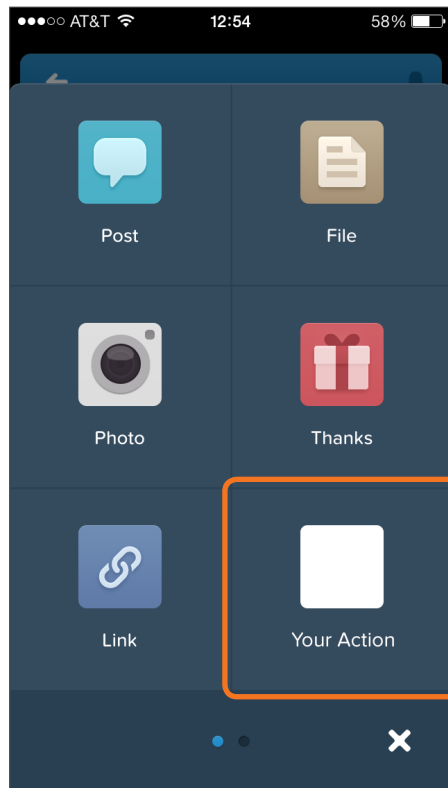
- You want to create a new record or modify an existing record.
- The action can be completed within a single view (or in some cases, multiple views with an hub & spoke model).

What you get, out of the box:

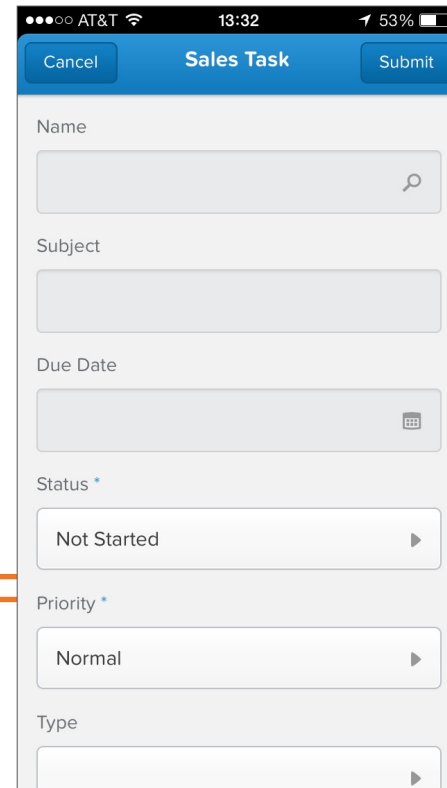
The Action Form triggered by a publisher action includes:

- Cancel button - should always be active and drop the user back to the view where they initiated the action from.
- Submit button - should be used to complete the action. Can be disabled/enabled programmatically to prevent submission.
- The contents of the form can either use standard action elements, or completely custom visualforce.

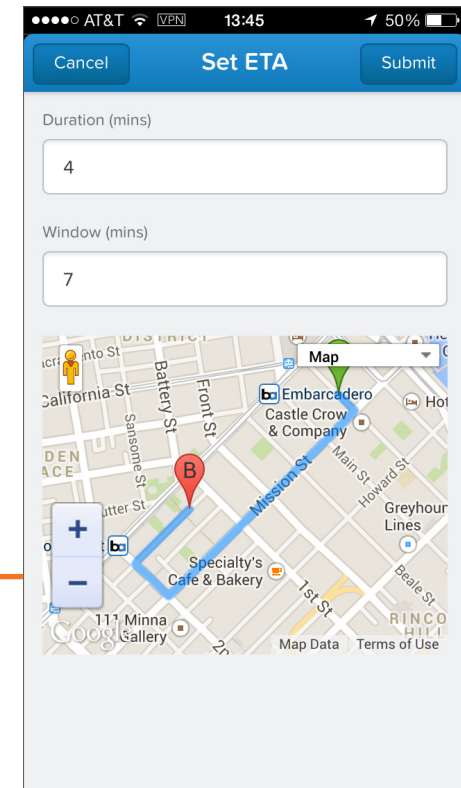
PUBLISHER



STANDARD ACTION



VISUALFORCE ACTION



Publisher Actions - Continued

Requirements

- Publisher actions take the user to an Action Form.
- The Submit button provided by the framework (in header) is required to submit the action. No other, in-page buttons can close the action window.
- The Submit button can be disabled until user has completed required items.

Best Practices

- Actions should serve one objective, create multiple actions if you need to handle different use cases.
- Actions should have action-oriented names: New... , Share... , Update... , Import... , etc.
- Fast and simple: Show the minimum number of fields possible.
- Try to make your action achievable in one-step.
 - If a multi-step action flow is required, please consult SFDC.
- Avoid secondary buttons. Submit and Cancel should handle most use cases.
- Avoid dead-ends.
 - The final step of an action must be for the user to use the Salesforce1 provided Submit button and return their previous context.
- If possible, don't make the user switch between apps.

Do not use publisher actions for:

- Displaying read-only data only
- As a navigation shortcut to an external website or 3rd party native application.
- Complex wizard like multi-step flows.

Additional Considerations

There are a few other topics to consider as you develop your integration.

- [Icon Guidelines](#)
- [AppExchange Guidelines](#)

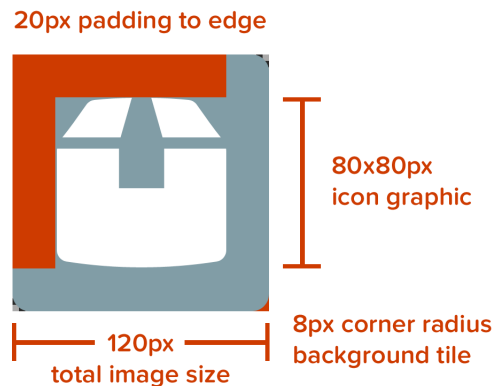
Icon Guidelines

Navigation Menu App Icon

This icon will appear in 2 different locations within Salesforce – in the Salesforce 1 navigation menu, and in the desktop All Tabs view. Due to the different visual contexts (one location uses a dark background, the other light) it is important to test your icon in both locations.

- 120x120px @ 72dpi
- Less than 10KB file size
- PNG format with transparent background
- Include a background within the icon with a 8 pixel corner radius.
- Do NOT include outer shadows on the inner icon graphic.
- Within Setup, set the background to match the color in your icon file.
- Icon can be your logo.
- Icon graphic should be solid white (or at least lighter than the background color).
- Inner app icon graphics should be centered within a 80x80px area, leaving 20px of spacing surrounding it in a 120x120px final format.
- Avoid heavy inner and/or outer shadows
- Simple and flat styling resembling the Salesforce 1 icon family (no highlights or glossy rendering should be used).

NAVIGATION MENU ICON

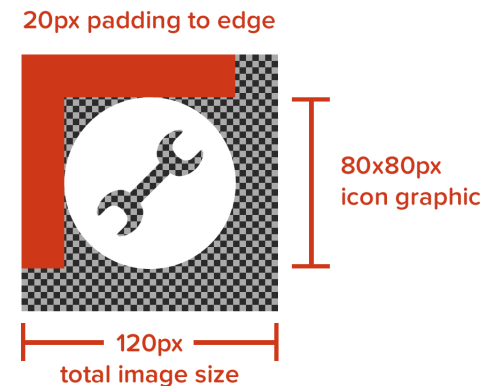


Publisher Action Icon

Publisher action icons appear within the Publisher, and should do their best to communicate the action that is about to be performed.

- 120x120px @ 72dpi
- Less than 10KB file size
- PNG format with transparent background
- Do NOT include a background color (it is defined in Setup)
- Do NOT include outer shadows on the inner icon graphic
- Do NOT use your logo as the icon
- Inner icon graphics should be centered within a 80x80px area, leaving 20px of spacing surrounding it in a 120x120px final format
- Icon graphic should be solid white (or at least lighter than the background color).
- Avoid heavy inner and/or outer shadows
- Simple and flat styling resembling the Salesforce 1 icon family (no highlights or glossy rendering should be used)

PUBLISHER ACTION ICON



AppExchange Guidelines

Because of the high visibility of AppExchange apps, it is important that they set a good example and follow the Salesforce1 guidelines closely. Apps will be reviewed by Salesforce.com staff, and apps that violate these guidelines will need to be revised before approval may be granted.

Here are some examples of likely rejection and approval cases. If you have questions about your specific case, reach out to your Salesforce representatives.

Custom Object

- Encouraged
 - Customization of the Detail and Related Pages within the Record Home view using Visualforce, Lookup, or Related Cards.

Record View - Cards

- Rejection Likely
 - Content that is visually jarring with the surrounding Salesforce 1 appearance (different fonts & sizes, poor color choices).
- Encouraged
 - Visualizations that simplify understanding of complex data.
 - Bringing relevant, contextual data to the user so they don't need to dig for it.

Record View - Standard Action

- Rejection Likely
 - Directly opening another app without prompting the user to select any data from the current record.
- Encouraged
 - Using wizard style behavior (multiple steps over sequential screens).
 - Using a hub & spoke model to select specific data or options.
 - Starting with a Visualforce page to allow user data selection or entry and then opening another native app on the device.
 - Performing a simple operation on the current record that doesn't meet the publisher action requirements.

Navigation Menu Apps

- Rejection Likely
 - Directly opening another native app without prompting the user to select any data from within Salesforce1.
 - Duplicating the functionality/appearance of an object or list view.
- Encouraged
 - Providing a summary of multiple objects.
 - Providing a visualization or summarization of complex data within a single object or across multiple objects.

Publisher Action

- Rejection Likely
 - Directly opening another native app from the publisher action.
 - Including wizard style behavior (multiple steps over sequential screens).
 - Ending a publisher action without using the Cancel or Submit buttons.
 - Circumventing the Cancel & Submit buttons provided by the salesforce1 framework.
- Case-by-case basis
 - Starting an action with a Visualforce form and then opening a native app on the device. If there is a technical constraint that can't be satisfied with Visualforce or HTML5 then approval is more likely. Discuss your proposed flow and constraints with Salesforce before devoting development resources.
- Tolerated
 - Using a hub & spoke model to select specific data or options. We'd encourage you to try to simplify the flow to a single screen, but there are cases where that may not be feasible.
- Encouraged
 - Ending the action with clear Cancel & Submit behaviors.
 - Publisher action that uses a single page that can be completed in less than 30 seconds.

AppExchange Guidelines - Continued

Visual Language

- Rejection Likely
 - Icons (App, Object, Publisher) that don't follow the style guide.
 - In particular, publisher actions that use a company logo as the icon will be rejected.
 - Elements that violate the component style guide. Basic patterns like cards, lists, etc. should be followed and should look and act the same.

Mismatched User Expectations

There are many design & behavior patterns within Salesforce1, most of which are covered in the style guide. Do not use any of these patterns in ways that are different than those described in the style guide or implemented within the Salesforce 1 app.

For example: Users expect the 3 pages of the Record View to be Feed, Details & Related. Those 3 pages are visually indicated with 3 dots below the anchor block. Do not use 3 dots in a similar configuration to present different content - it will violate the user's expectations and will lead to confusion.