Getting Started with SalesForce CRM

Getting Started with SALESFORCE Part IV

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for SalesForce. The document focuses on setting up page layout, adding custom tags and objects. Join our professional training program and learn from experts.

History:

Version	Description Change	Author	Publish Date
0.1	Initial Draft	Chandra Prakash Sharma	4th May 2012
0.1	Review#1	Amit Sharma	4th May 2012

Contents

Page Layout Editor in SalesForce

SalesForce has Provide two drag and drop tools for editing page layout, You can customize the page layout for record detail and edit pages. Page Layout include s-controls and VisualForce pages that are Provide within a field section when the page display. You can control the size s-controls and VisualForce pages, and determine whether or not a label and scroll bars display.

There in SalesForce Page Layout Editor Two Types :-

1.) Page Layout Editor for Standard Objects.

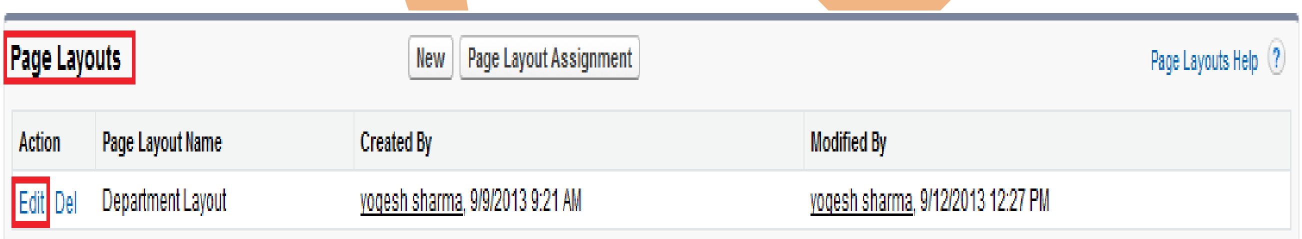
2.) Page Layout Editor for Custom Objects.

Note :- Every Custom Objects will have one default page layout.

How to set page layout editor in SalesForce :

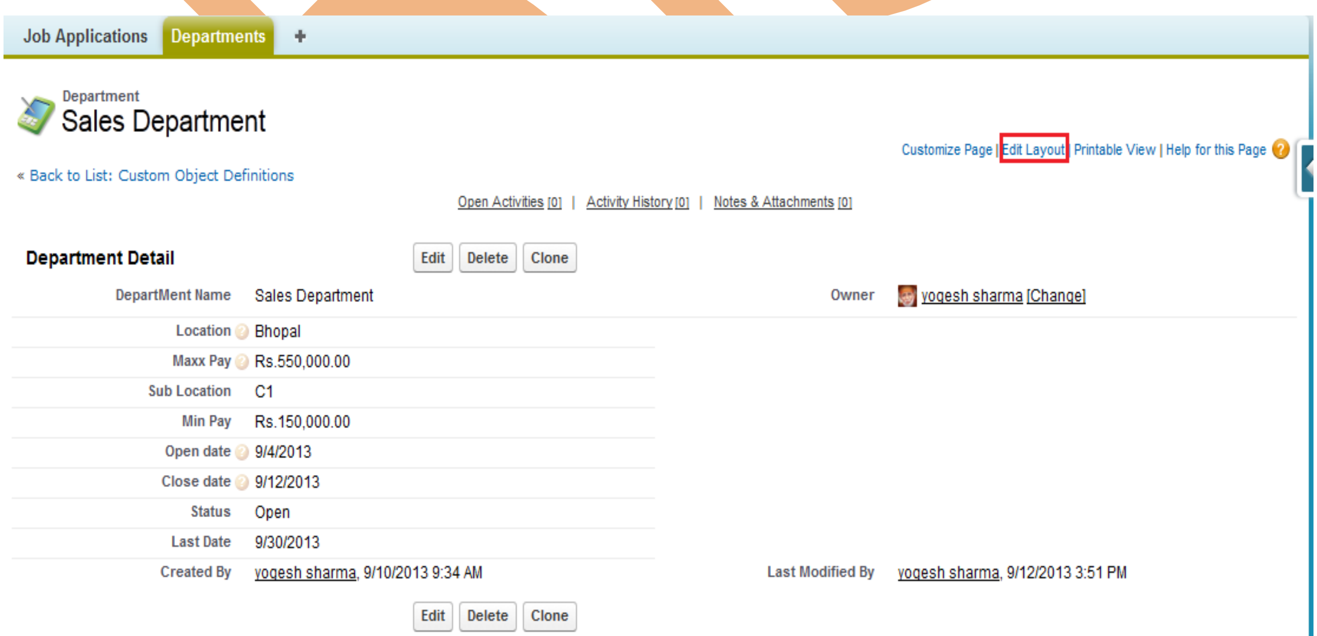
Step 1 :-

click to **setup** -> **Build** -> **Create** -> **Objects** -> click to any **Custom Objects** (Ex :- Departments) -> Then there is find **Page Layouts** panel click to **Edit** button



OR

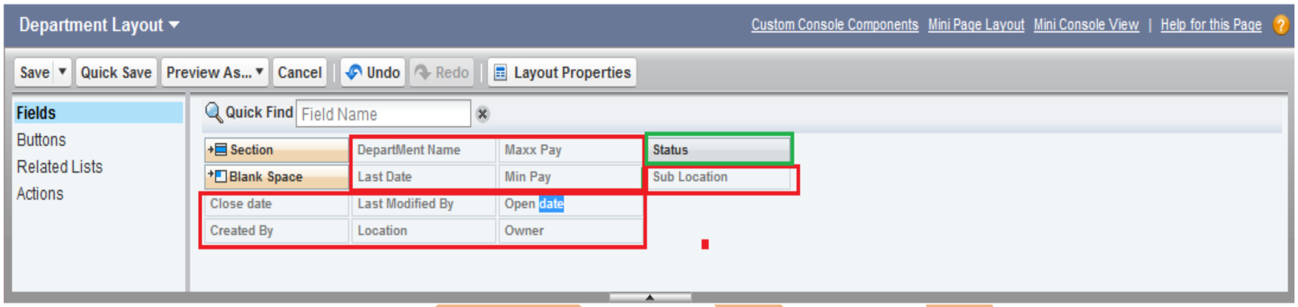
There is second option to go to **page layout editor**. Go to **custom objects** (Ex :- Departments) click to any **custom fields** and after that you can see Upper Right side **Edit Layout**. you can see below



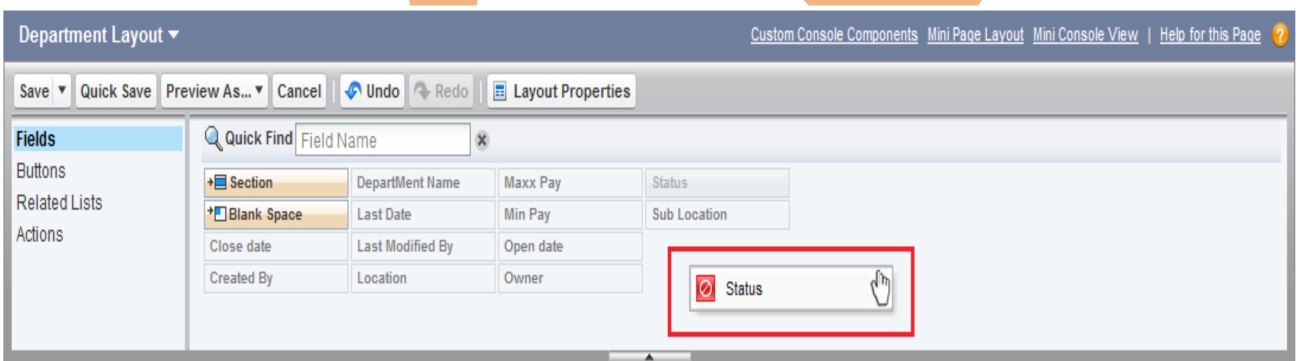
Step 2 :-

After That Click to **Edit** or **Edit Layout** you can see **page layout editor** below.

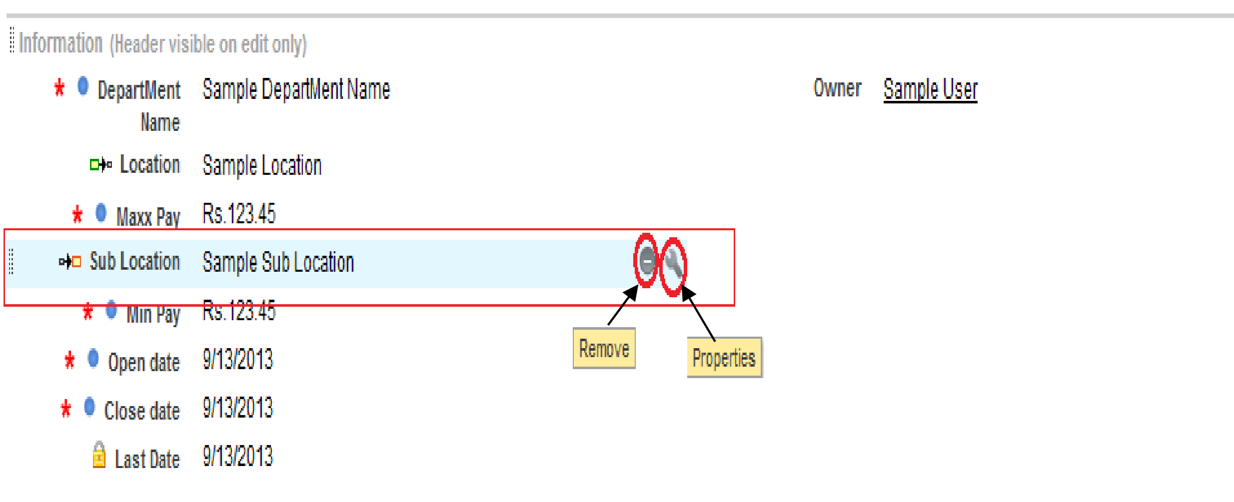
There is you can see some field is **read only**(enable false, you can see only not perform any thing) field   this filed is currently in working, and some field is **Highlighted** you can this field restore in you page layout editor.



If want to Restore **Highlighted field** just go and drag this and drop where you want. you can see below screen.



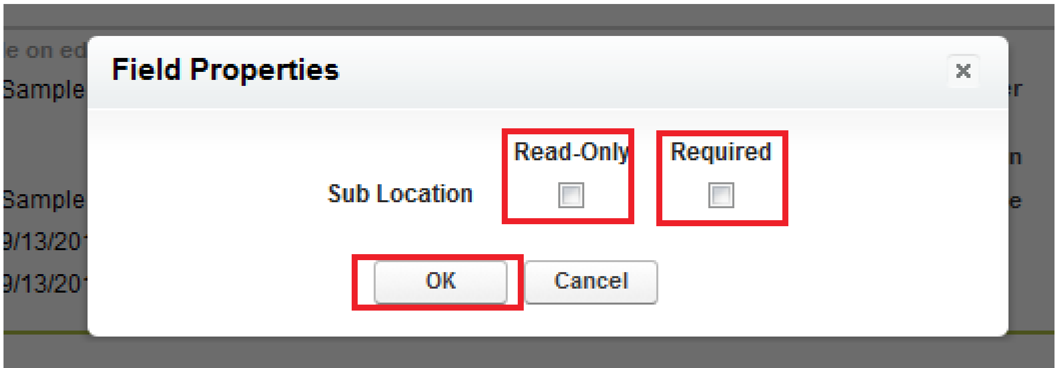
you can easily move up-down and left-right just Drag on field and drop where you want to drop this field. you can all so remove any field and restore. just go on mouse on this field and you can see two icon **Remove** and **Properties** click to any icon to perform operation.



Step 3 :-

Remove :- Click on this icon remove this field .

Properties :- There is to Check box **Read only** and **Required.**

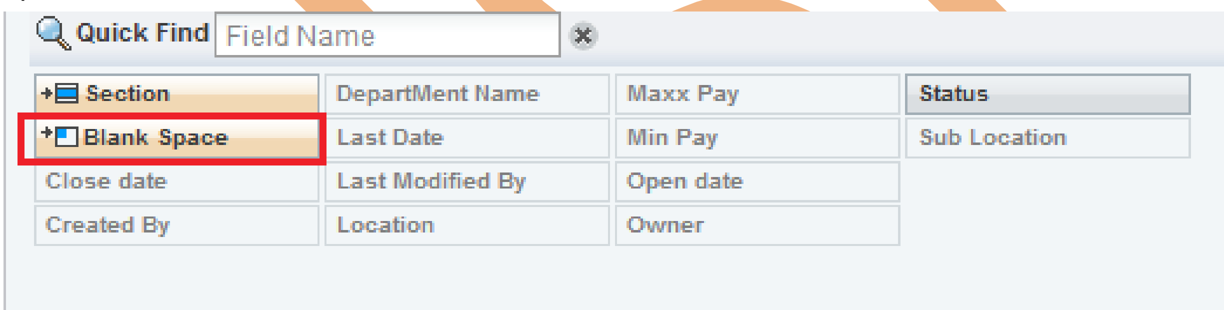


Read only :- checked this properties this field read only you can't changes in this filed.

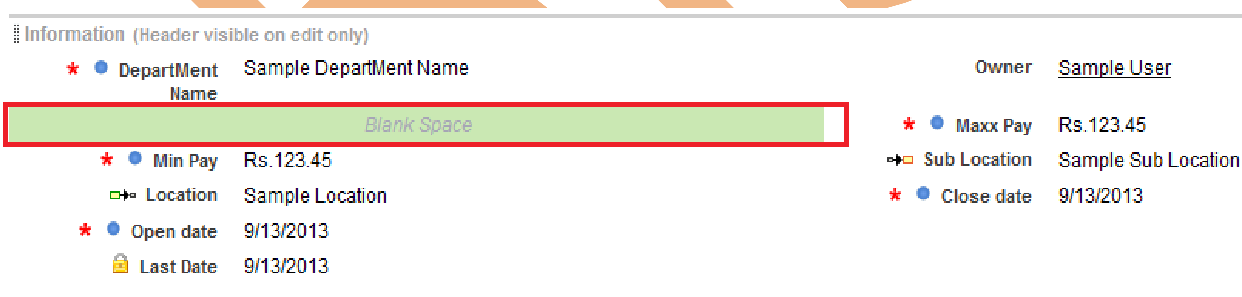
Required :- after checked this properties you can't be left blank this field.

Step 4 :-

Add all so blank space drag and drop on **Blank space** Button where you want to blank space.



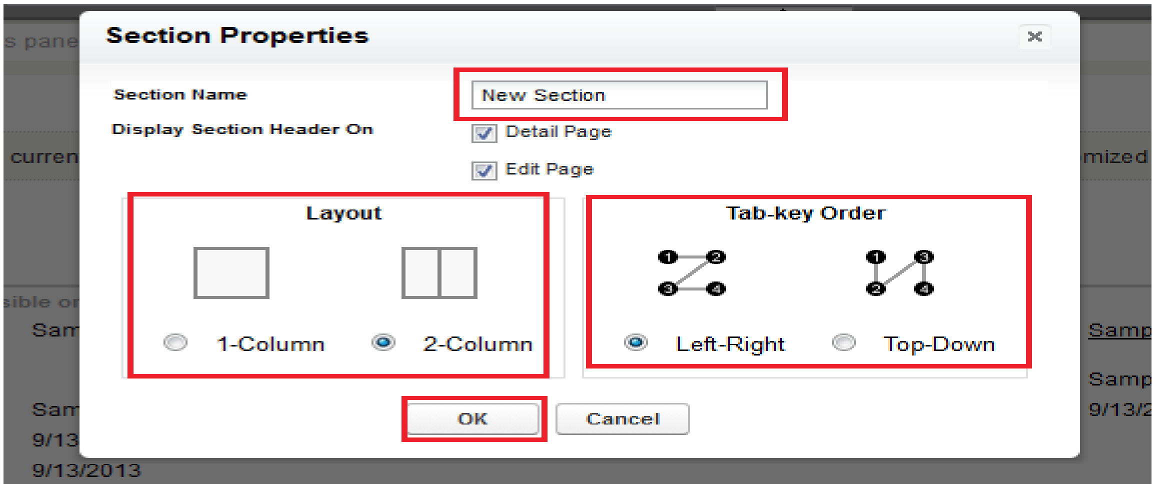
After **drag and drop** you can see how to look **blank space.**



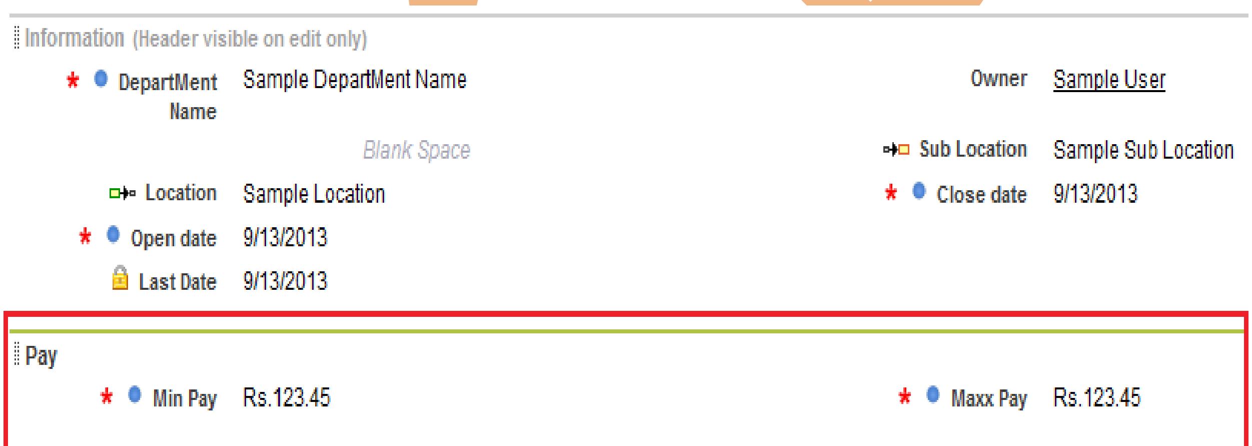
You can all so add section in **page layout editor** section is area of any field in section you can put any field For Ex :- you want to add section Pay in this section I will add Min pay or Max Pay.

drag and drop section after that see popup window see below

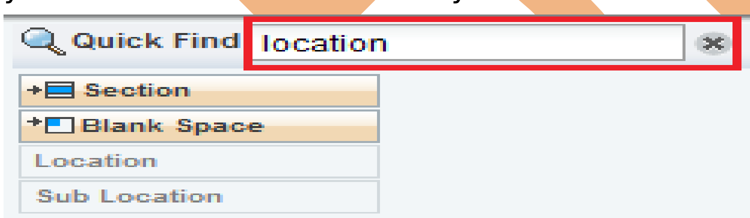
There is provide **section name**, **Layout**, **Tab-Key-Order** after fill all filed click to ok.



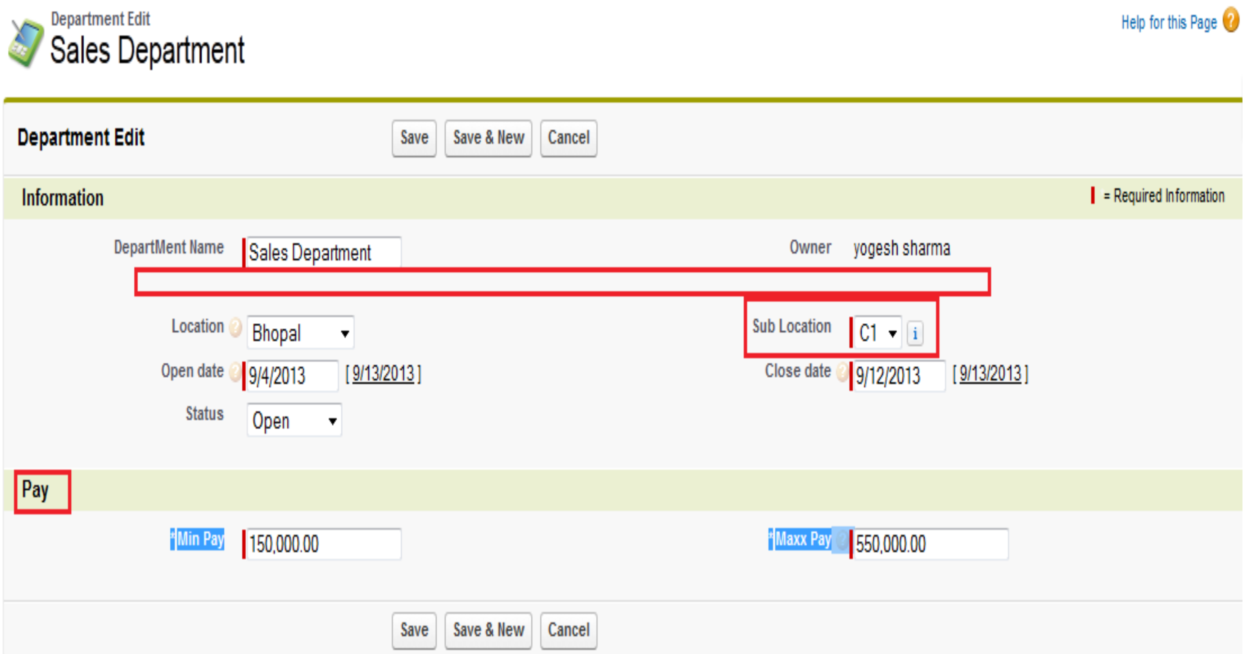
drag and drop **Section** on your page after that drag and drop your field in this section. see below.
and all show move all section to any ware on this layout.



Note :- Any custom Object can have 500 Field Maximum.
you can **search** this field easily



After Save these all change click to **Save** button. go to custom object link see how's is look these are field's. you can see below



Custom Tab in SalesForce

A custom tab is a User Interface Component in SalesForce, Custom tab display custom object data, Custom tab embed other web content in the application. There is three type Tab is available :-

1.) Custom Object Tabs.

2.) Custom Web Tabs.

3.) VisualForce Tabs.

Custom Object Tabs and Web Tabs available in Contact Manager, Group, Professional, Enterprise, Unlimited, and Developer Edition.

VisualForce Tabs available in Contact Manager, Group, Professional, Enterprise, Unlimited, and Developer Editions

Custom Object Tabs :

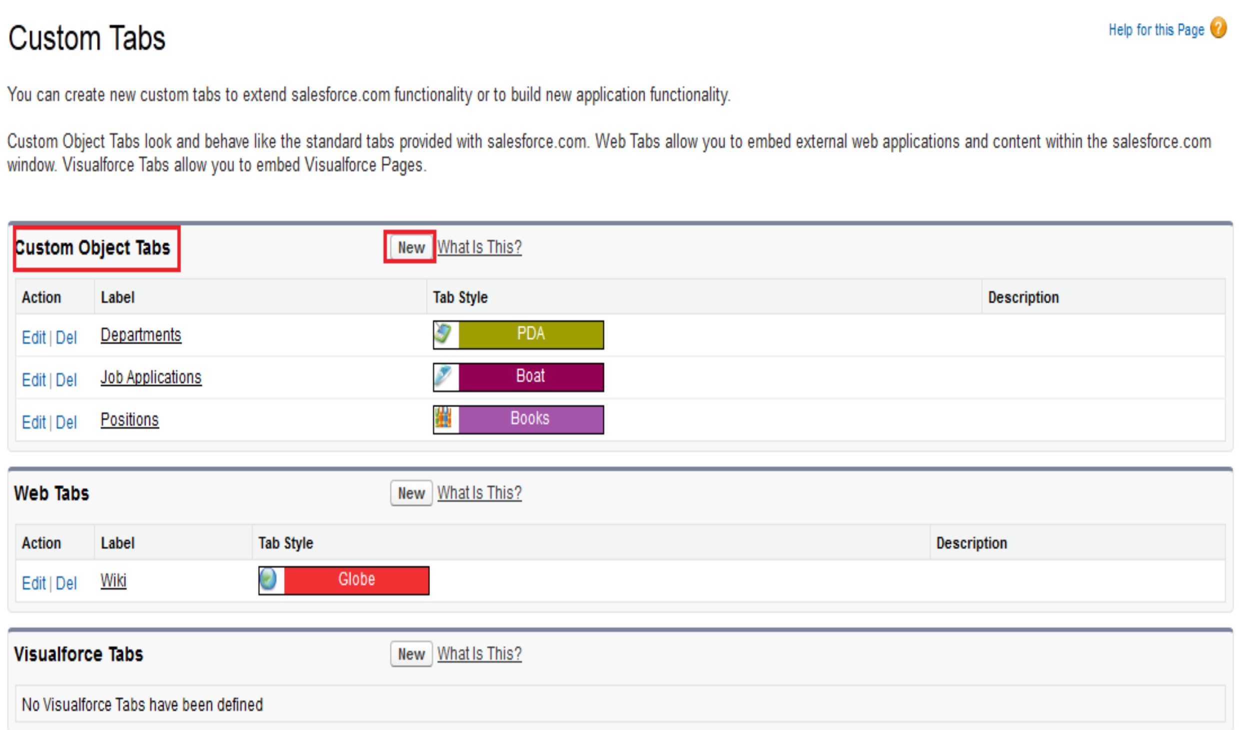
Custom Object tab is a standard tabs display and Create a tab for your custom tab data.

Note :- When be create **custom object** these custom object not show in user interface menu.

follow few steps how to add **Custom object Tabs** in SalesForce, And custom tab in user interface.

How To Create Custom Object Tabs :

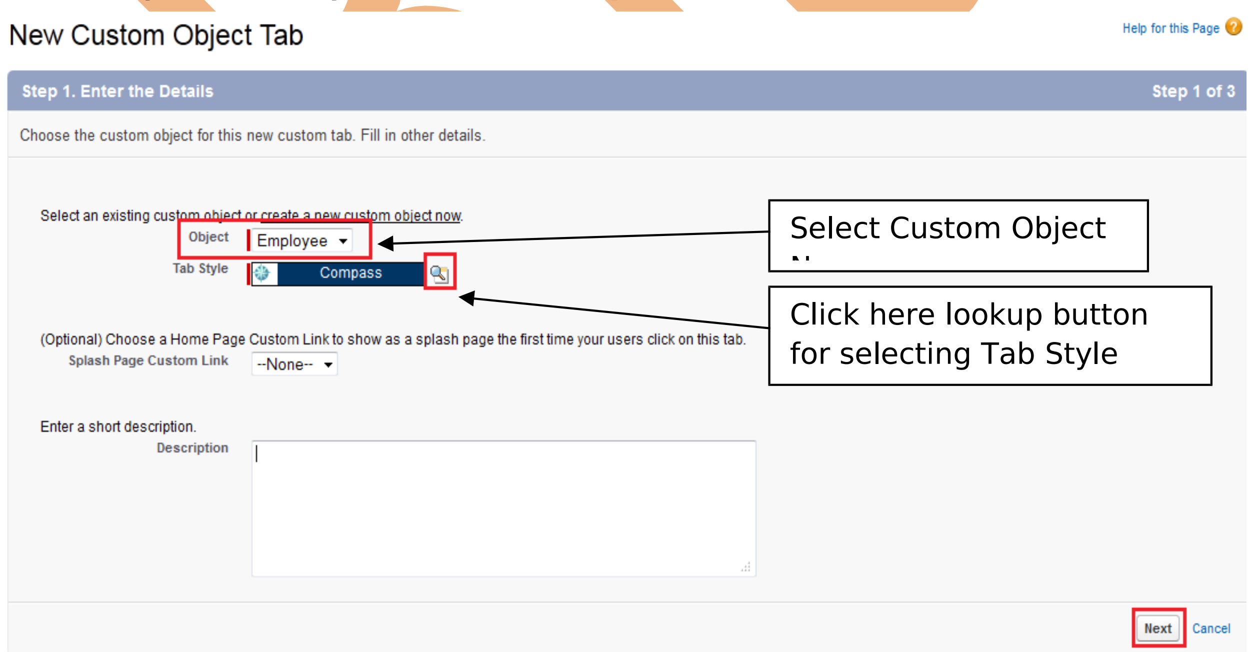
Click to **Setup** -> **Build** -> **Create** -> **Tabs**



Click To **New** button add **Custom object Tabs**. After that show on below screen.

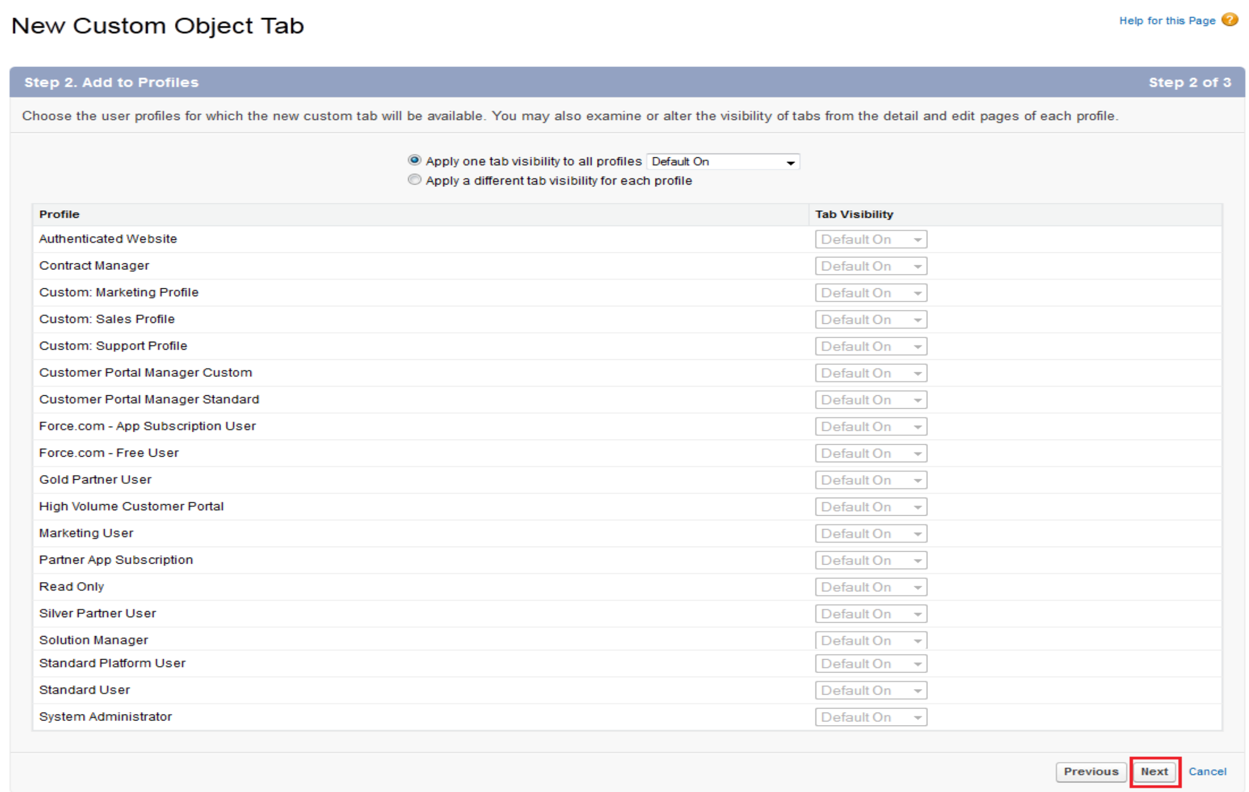
Step 1 :-

Select **Object**, **Tab style** , **Enter Description** after that click to **Next** button.



Step 2 :-

Click on **Next** button.



New Custom Object Tab

Help for this Page

Step 2. Add to Profiles — Step 2 of 3

Choose the user profiles 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 profile.

(•) Apply one tab visibility to all profiles: Default On

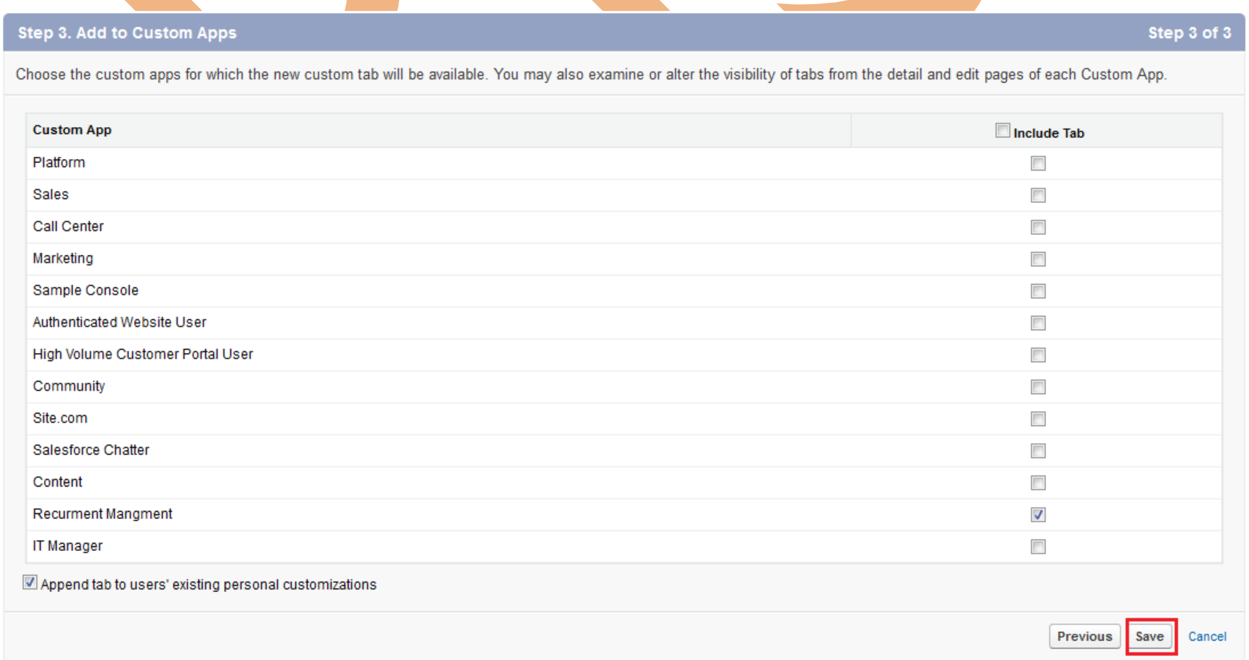
( ) Apply a different tab visibility for each profile

Profile	Tab Visibility
Authenticated Website	Default On
Contract Manager	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Portal Manager Custom	Default On
Customer Portal Manager Standard	Default On
Force.com - App Subscription User	Default On
Force.com - Free User	Default On
Gold Partner User	Default On
High Volume Customer Portal	Default On
Marketing User	Default On
Partner App Subscription	Default On
Read Only	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

Previous | Next | Cancel

Step 3 :-

Click to **Save** button to save this Custom object tab.



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.

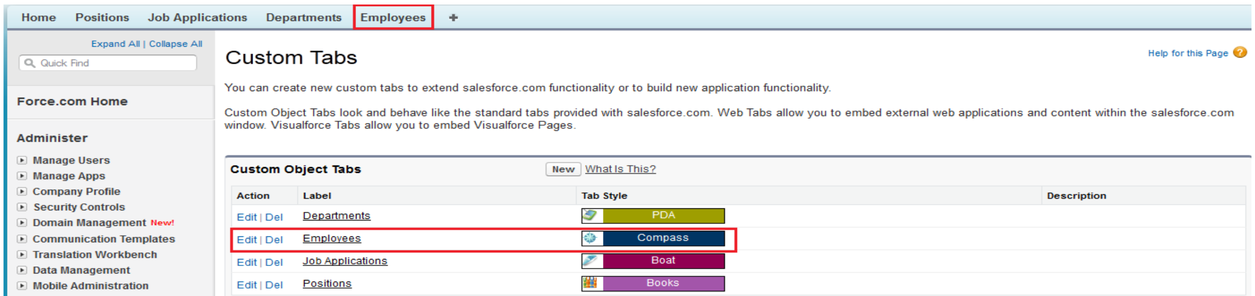
Custom App	Include Tab
Platform	[ ]
Sales	[ ]
Call Center	[ ]
Marketing	[ ]
Sample Console	[ ]
Authenticated Website User	[ ]
High Volume Customer Portal User	[ ]
Community	[ ]
Site.com	[ ]
Salesforce Chatter	[ ]
Content	[ ]
Recurment Mangment	[x]
IT Manager	[ ]

[x] Append tab to users' existing personal customizations

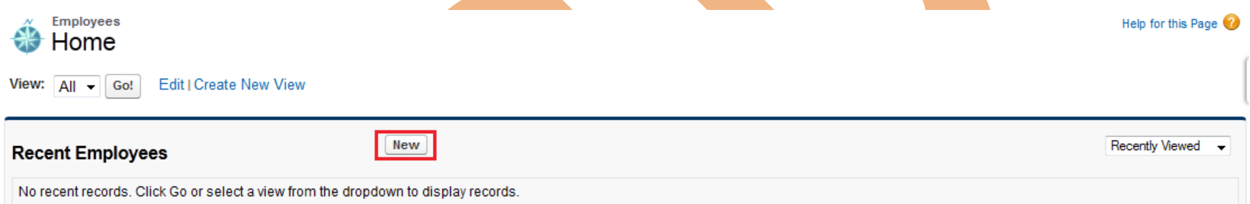
Previous | Save | Cancel

After Save you can see there is **Employees Tab** add successfully in user interface you can see below.

You can all show perform **Edit** Tab and **Delete** Tab.

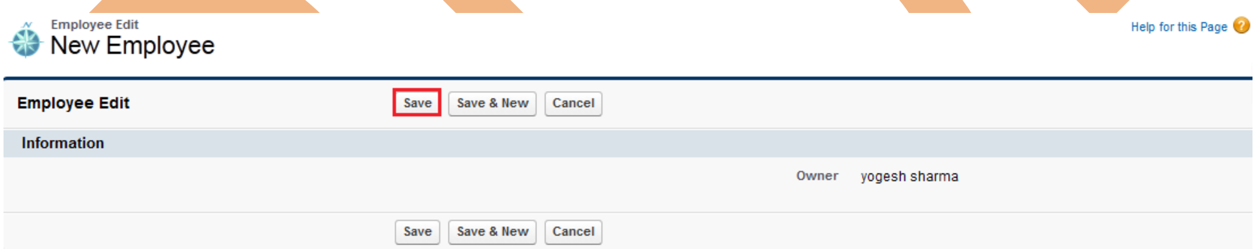


click on **Employee Tab** see below and click to **New** button .



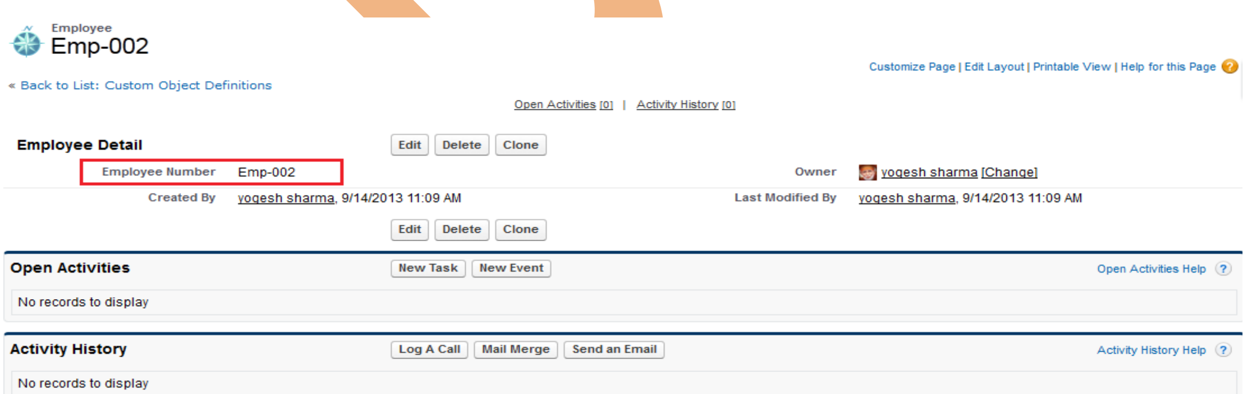
After that

In this custom field no default custom text field because employee has a auto number field you can just click on save button and show there is auto generate employee number.



Click on **Save** button.

You can check it **Employee Number** is auto generated.



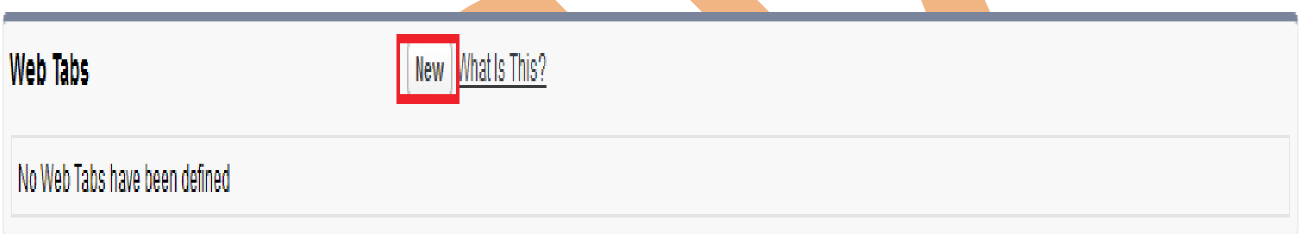
Custom Web Tabs in SalesForce :

Custom web tabs display any external web application and all so display web page, Custom tab is call other web page on SalesForce, you can add on SalesForce.com external web site by using web tabs.

Note :- Web tabs is not supported all the web site it supported only limited web site's.

How To Create Web Tabs in SalesForce.com :

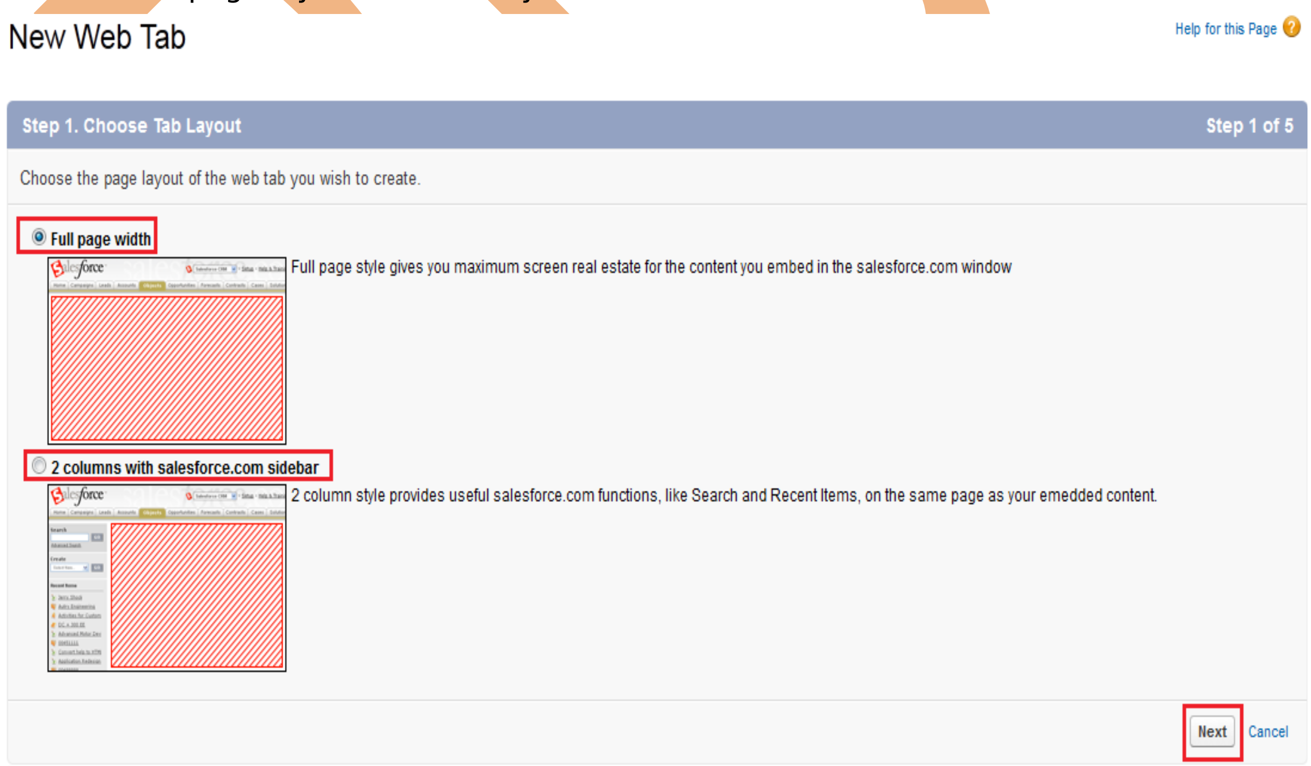
Click to **Setup** -> **Create** -> **Tabs** there you can find **Web Tabs** panel in this panel click to **New** button in **Web Tabs** panel. you can see below .



Step 1 :-

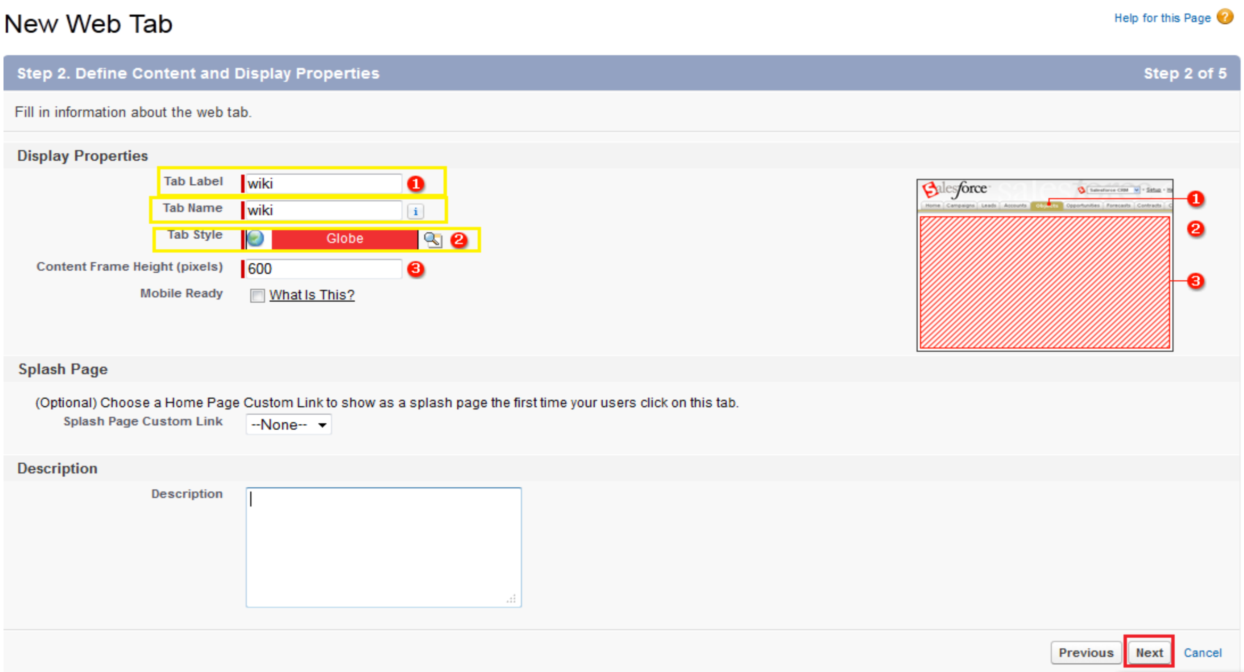
choose the Page layout. and click to **Next** button.

There is two page layout choose any one checked to radio button.



Step 2 :-

After that Insert **Tab label**, **Tab Style** , And give the **frame size** in pixels and click to **Next** button.

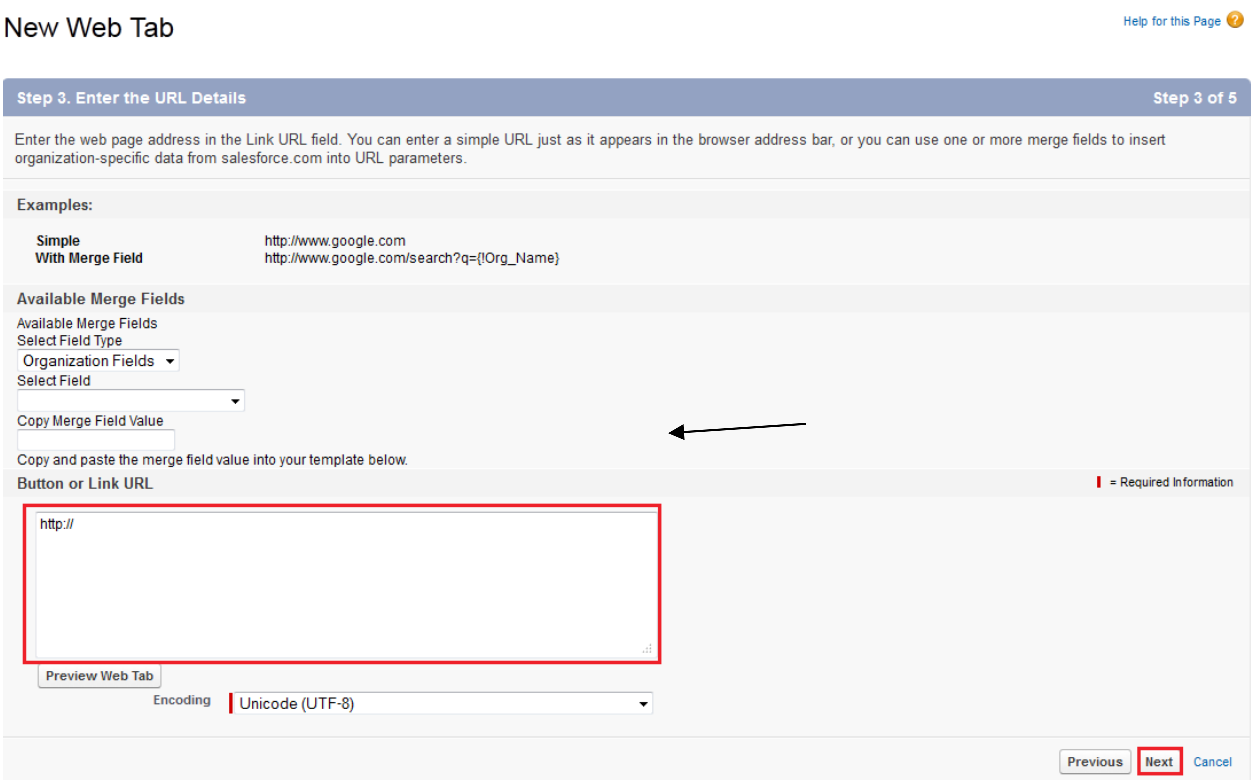


Step 3 :-

Enter Here Any Supportable URL link.

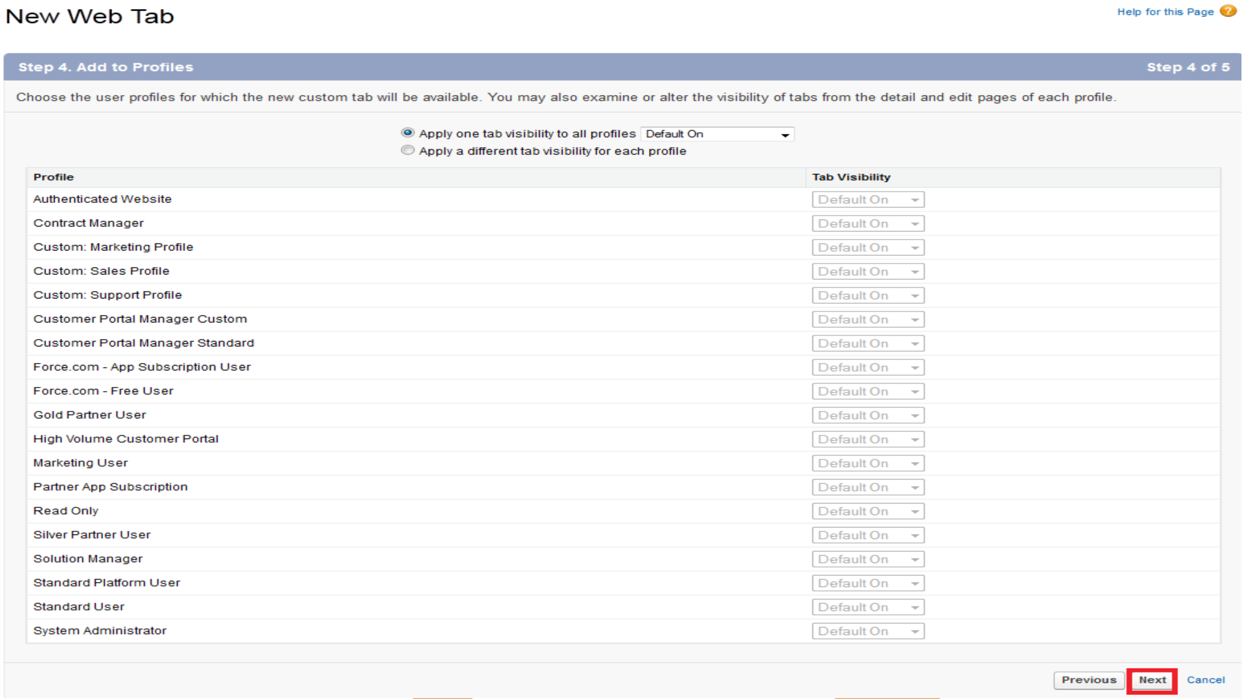
Ex :- http://www.wikipedia.org

Give the Supportable URL in **Button or Link URL** box, Click to **Next** Button.



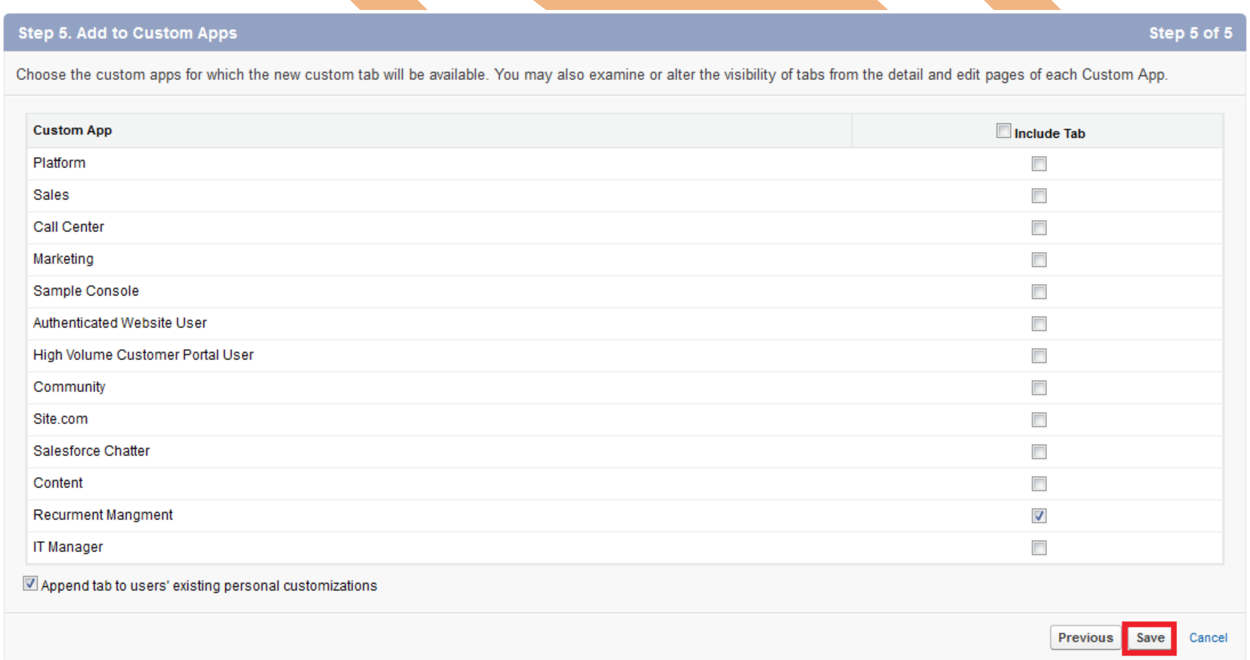
Step 4 :-

Click to **Next** button.



Step 5 :-

Click to **Save** button.



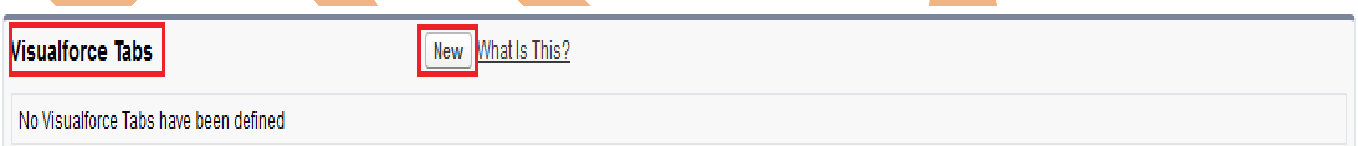
After that you can see it below, click on **wiki** tab for open this site.

VisualForce Tabs in SalesForce :

you can build Visualforce tabs so that user can access VisualForce pages in SalesForce.

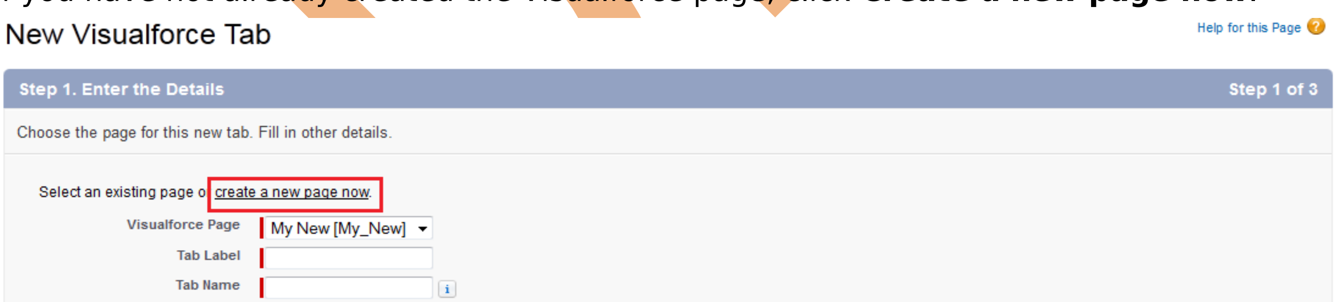
How to add VisualForce Tab in SalesForce :-

Click to **Setup** -> **Create** -> **Tabs** -> after click to tabs link you can see that Visual Force Tabs panel. you can see below. Click to **New** button for creating Visualforce.



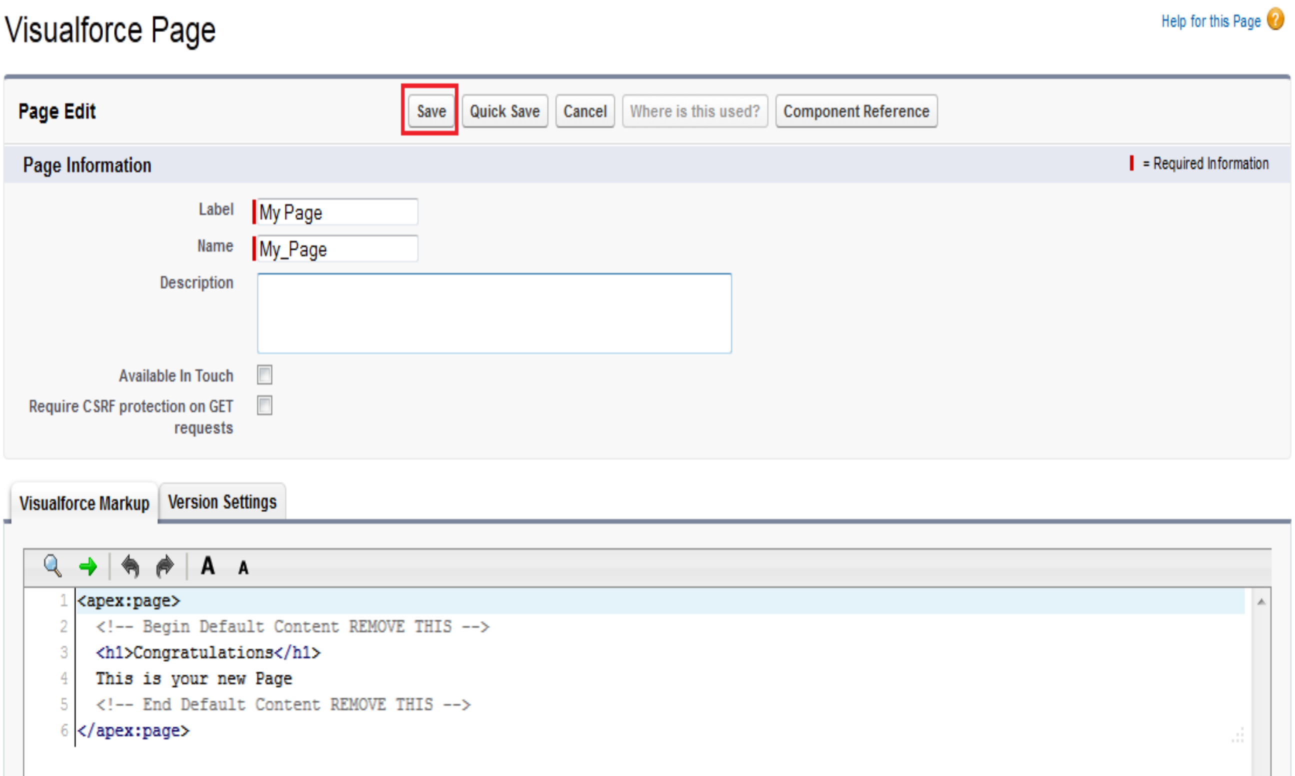
Step 1 :-

If you have not already created the Visualforce page, click **Create a new page now**.



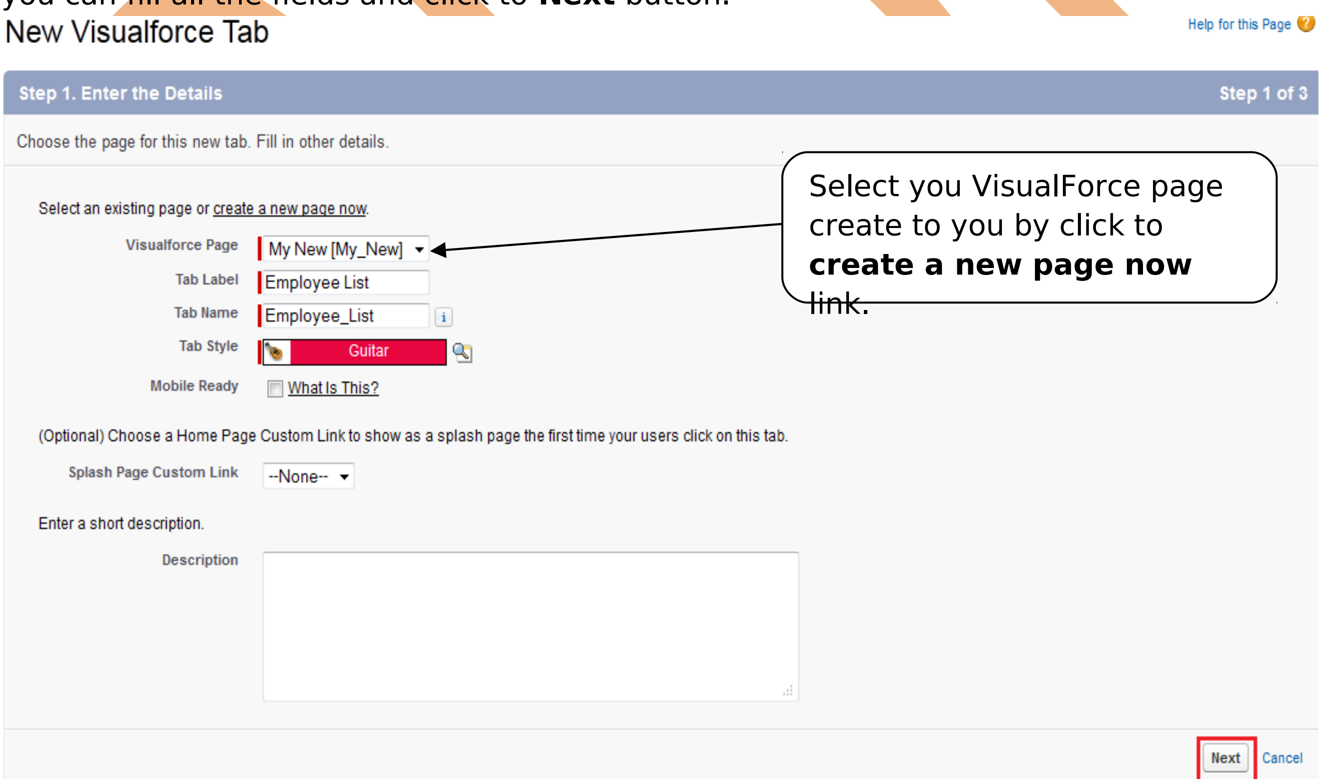
Step 2:-

After click **Create new Page Now** then show new page you can see below on screen in this page fill all fields and click to **Save** button.



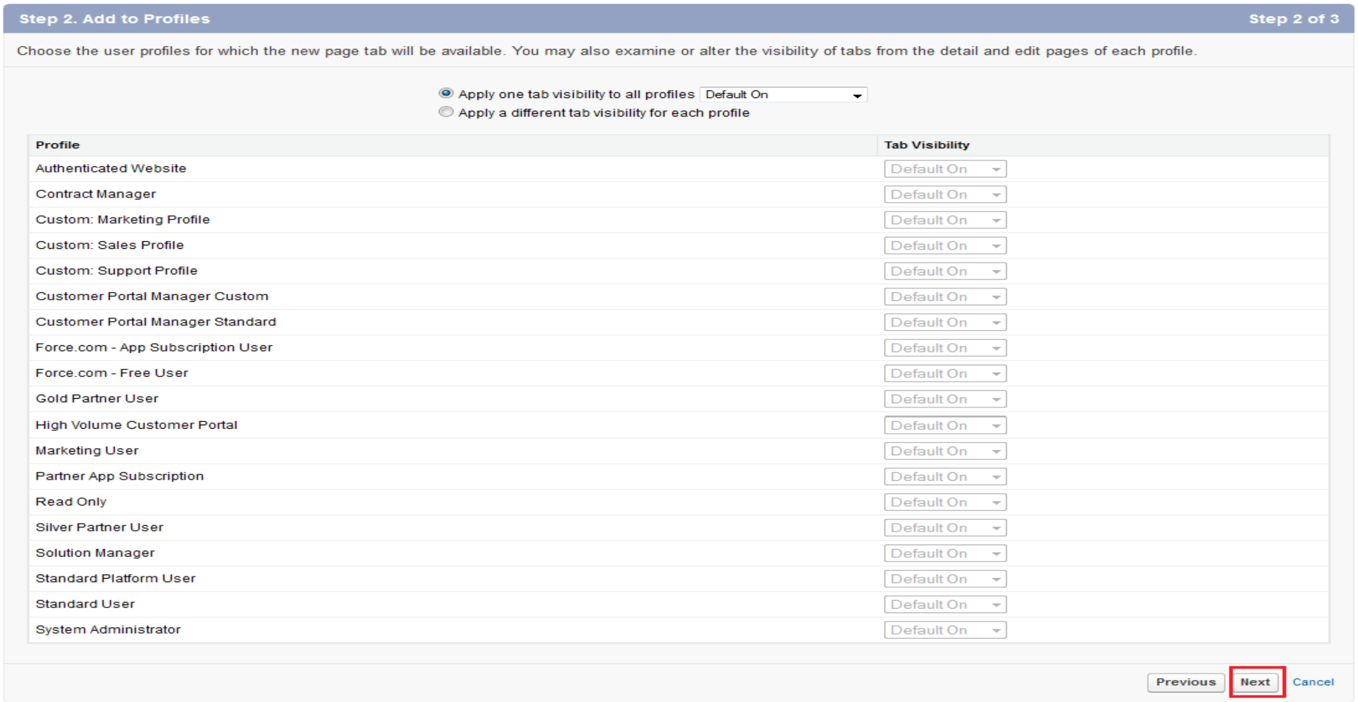
Step 3 :-

Then you click save button comeback to Previous page. you can see below. you can fill all the fields and click to **Next** button.



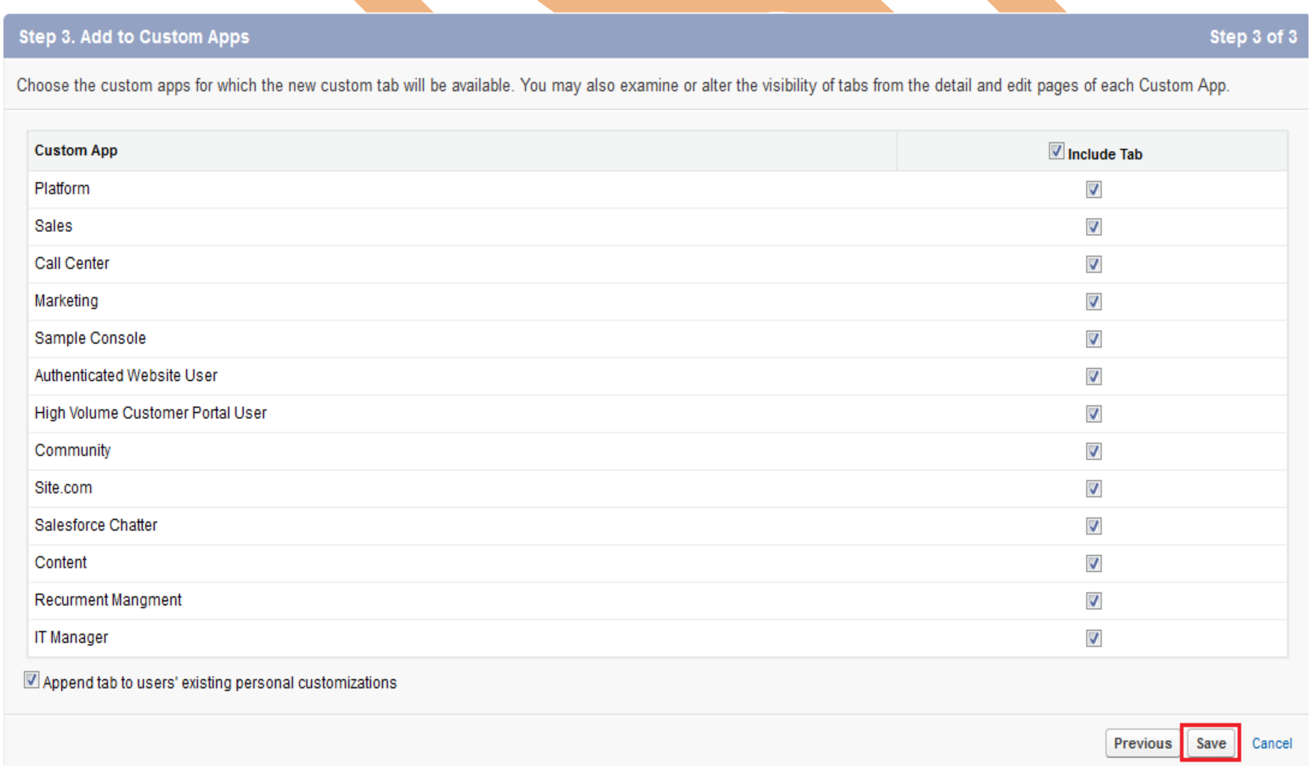
Step 4 :-

Click to **Next** button**.**



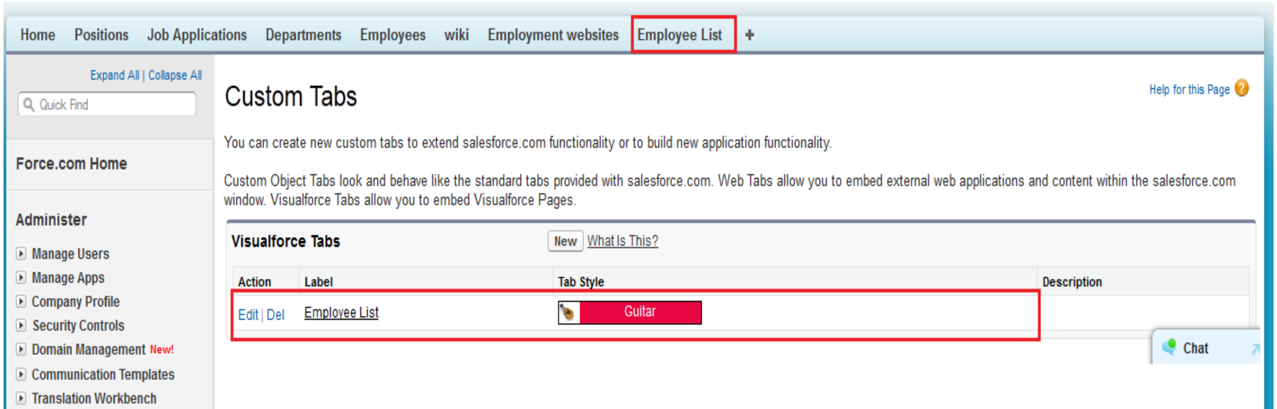
Step 5 :-

Click to **Save** butotn.



After click on **Save** button. you can add successfuly VisualForce tab. you can see below.

There is you can see **Employee List** add as a VisualForce Tab.

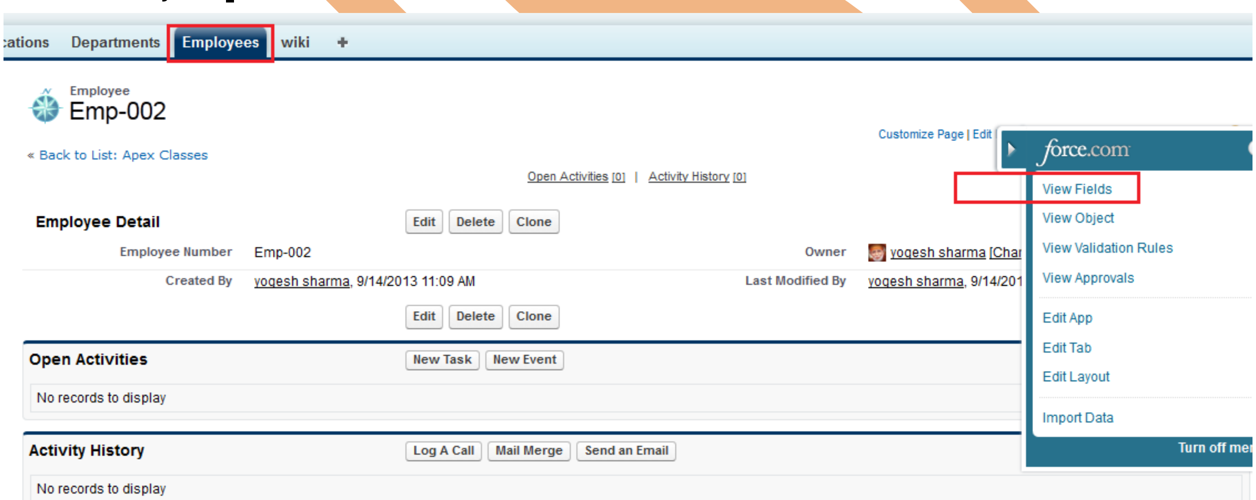


Add Field in Custom Object in SalesForce

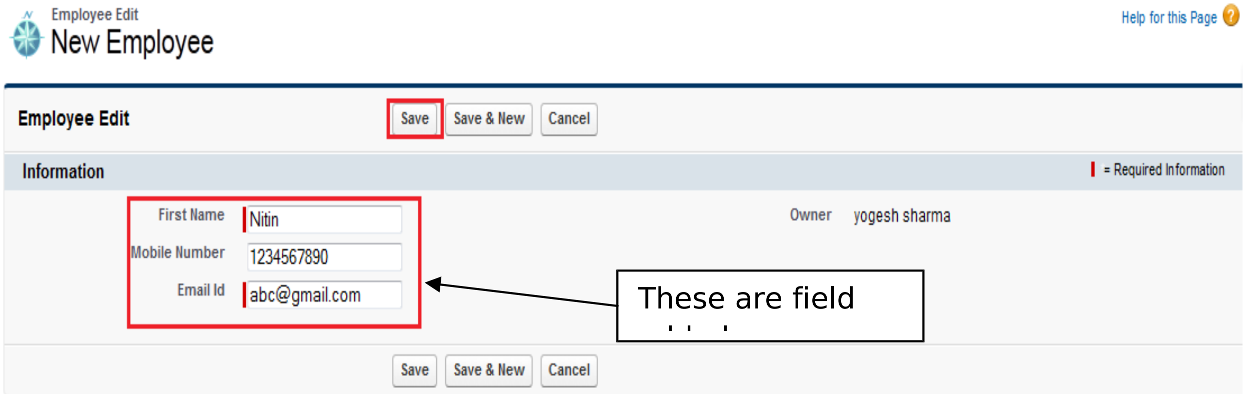
In add to field it is add primitive data types. in this adding section you can add **checkbox**, **Text**, **Mail** etc.

You want to add some more field in **Custom objects** (Ex :- Employees tab)

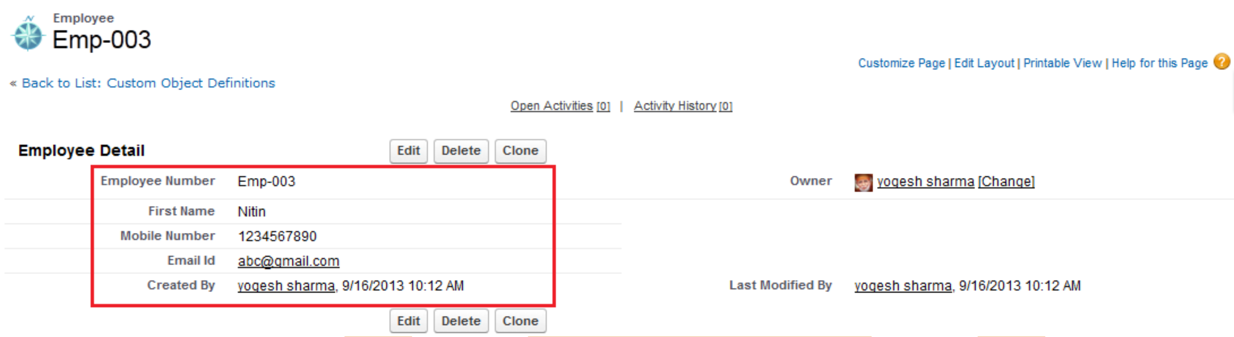
Click on the **Custom objects(Ex :- Employees Tab)** -> see right-middle there is one shortcut **popup window** -> click on **Views Fields** -> **Custom Fields & Relationships** Click on new button and select any data type which want to you add custom Object.



After adding field You can click to Custom objects(Ex :- Employees) and click to **New** button you can see it some field is add show on below screen.



After **Save** this fields data you can change on you Custom Object data(Ex- Employees) see below.

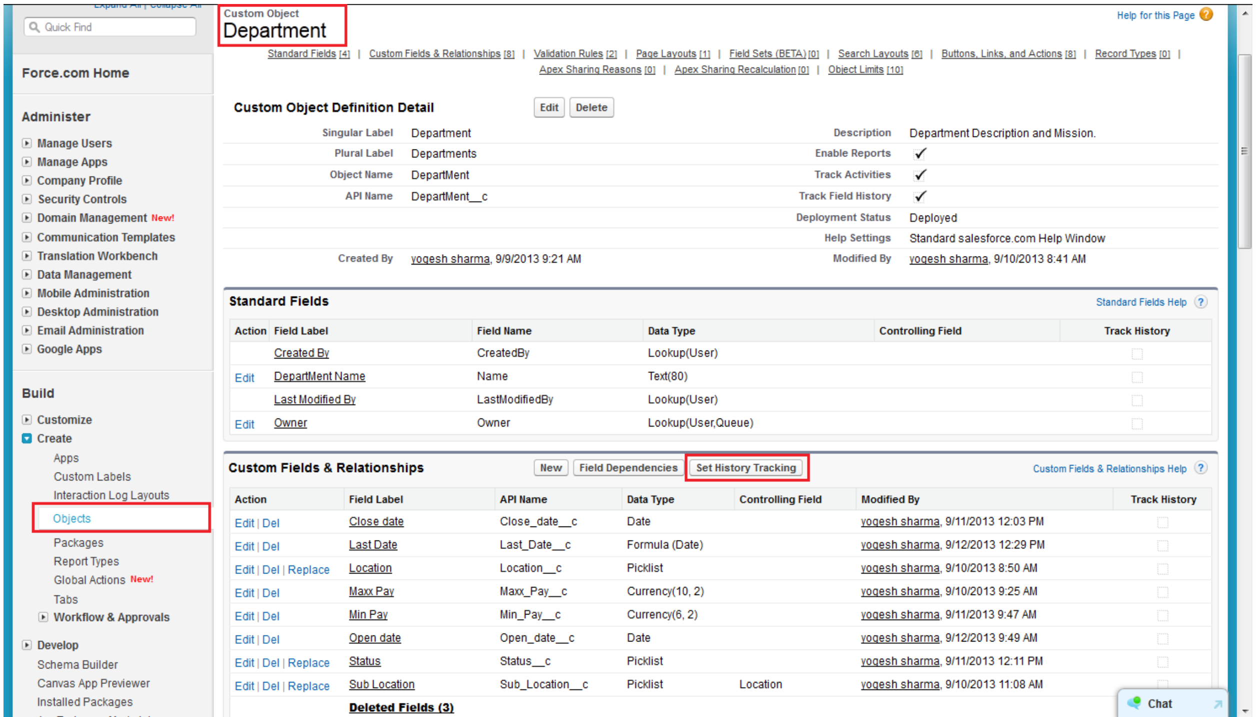


Track Field in SalesForce

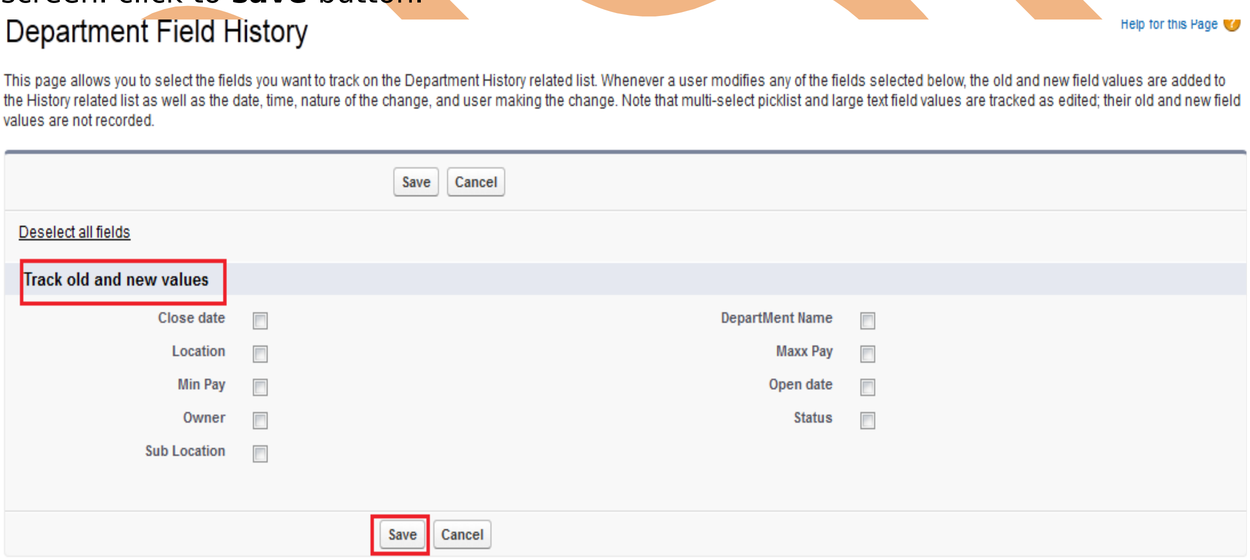
Track field display the history related of list of an object, if you want to see track field history on your profile
enable this field history.

How to Go Set History Tracking :

Click on **Setup** -> **Objects** -> Select any **Custom objects (Ex :- Departments)** and there is find **Set History Tracking** button and click on this button. you can show below.

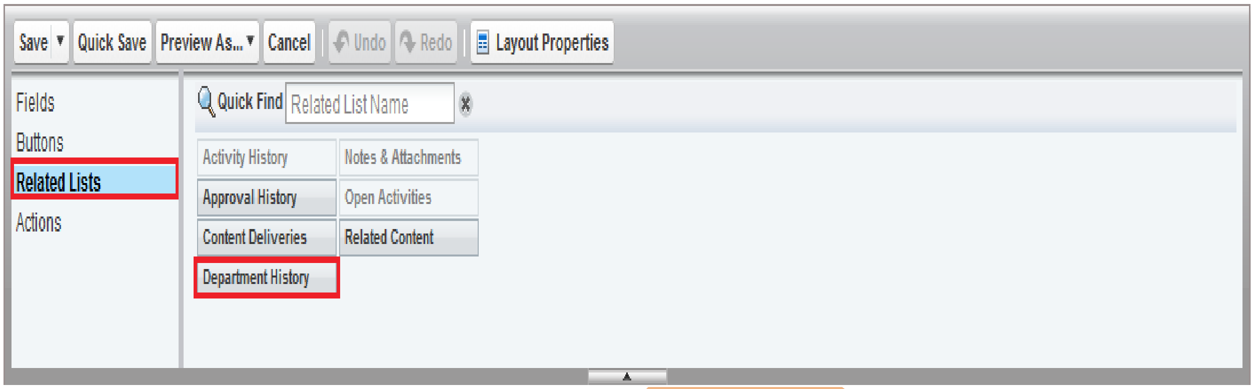


There is you can see **Track old and new values** which field want show checked the checkbox if no need to on this field click to unchecked check box. you can see below screen. click to **save** button.

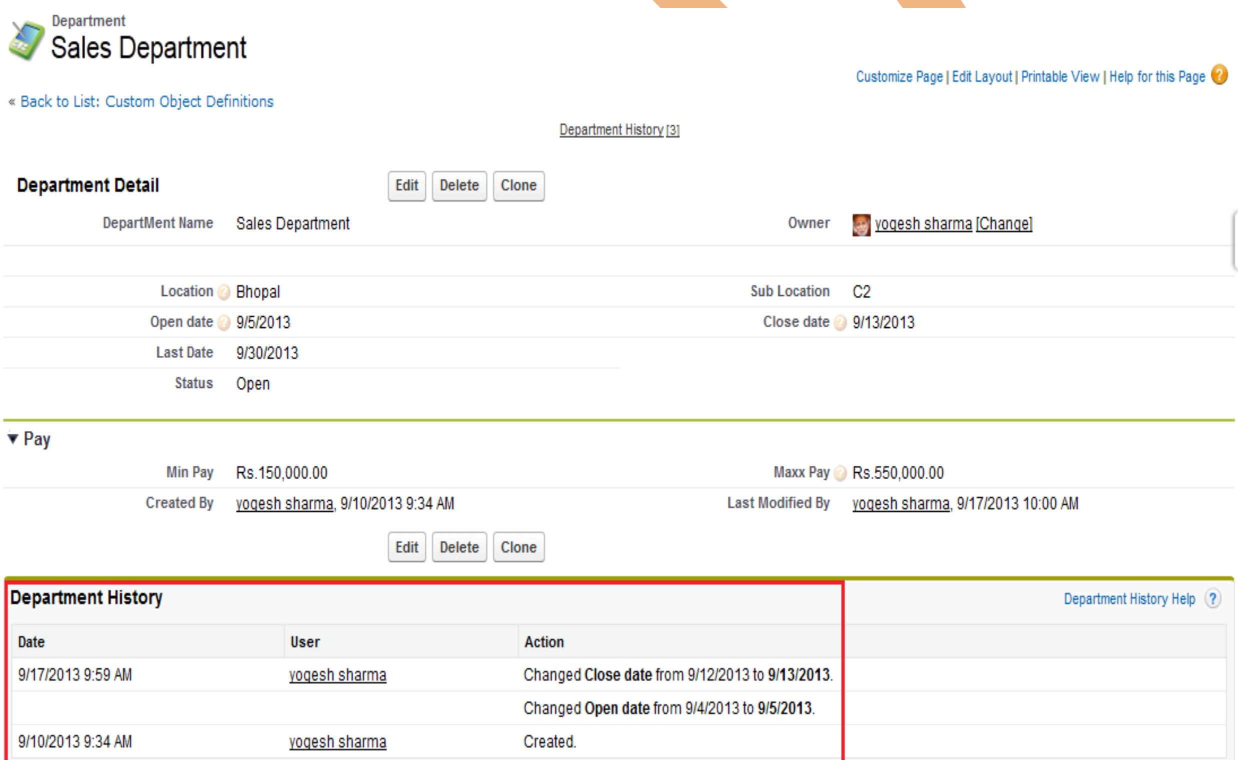


After that go to custom objects Layout page (Ex :- Departments layout) click to Edit Page layout.

after that you can show page layout editable page then you can see **Related List** menu on the open screen. After click on **Related List** you see that **Departments History** you can just drag and drop on page layout page.



After that save this page. and click to Custom objects tab(Ex :- Departments) and you can see that Department history is available on this page. see below



This is part of Department History
You can see that History.