



## 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
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BIS

# 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 :-

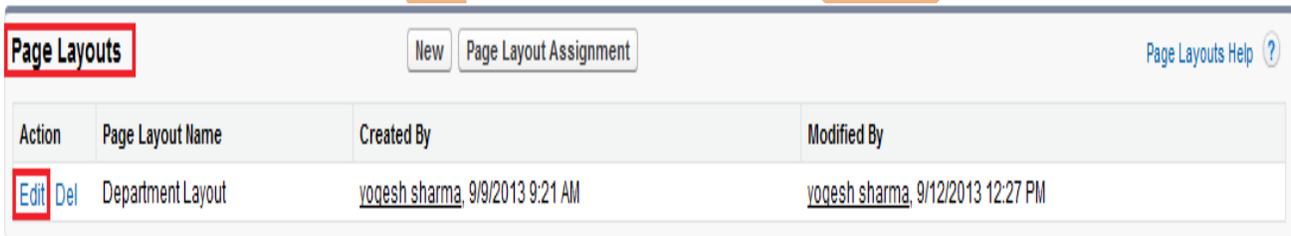
- 1.) Page Layout Editor for Standard Objects.
- 2.) Page Layout Editor for Custom Objects.

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

## How to set page layout editor in Salesforce :

### Step 1 :-

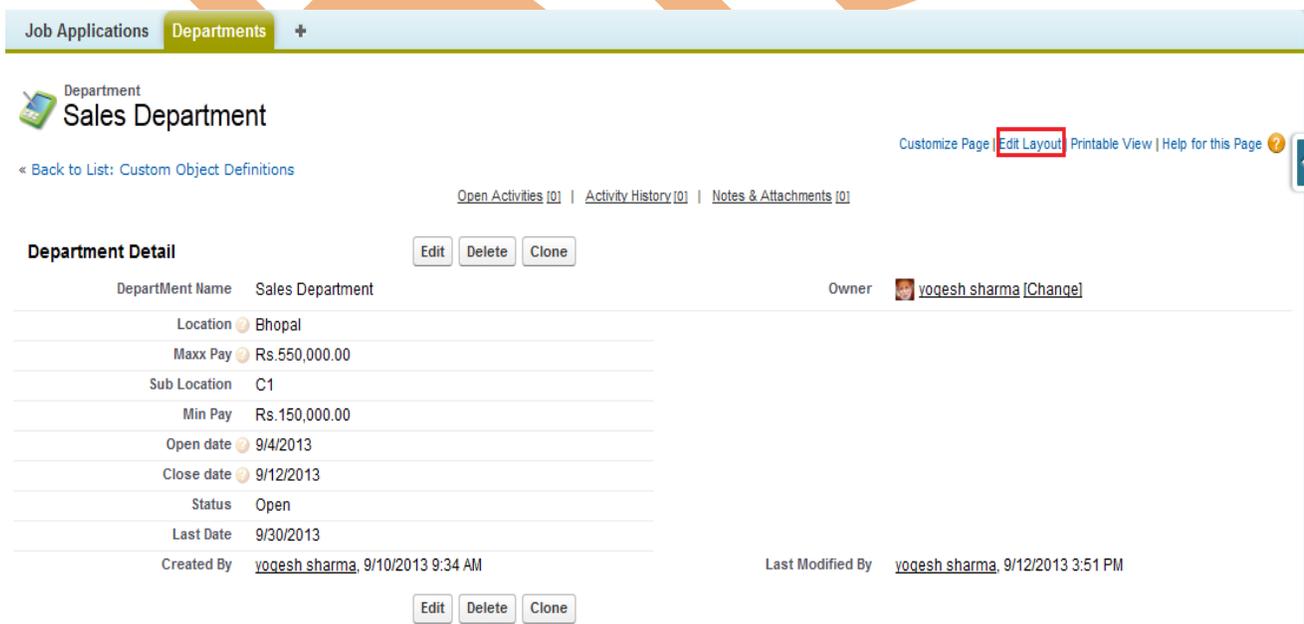
click to **setup** -> **Build** -> **Create** -> **Objects** -> click to any **Custom Objects** (Ex :- Departments) -> Then there is find **Page Layouts** panel click to **Edit** button



Action	Page Layout Name	Created By	Modified By
<a href="#">Edit</a> <a href="#">Del</a>	Department Layout	<a href="#">yogesh sharma</a> , 9/9/2013 9:21 AM	<a href="#">yogesh sharma</a> , 9/12/2013 12:27 PM

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



Job Applications Departments +

Department  
Sales Department

Customize Page [Edit Layout](#) Printable View | Help for this Page ?

← Back to List: Custom Object Definitions

Open Activities [0] | Activity History [0] | Notes & Attachments [0]

**Department Detail** [Edit](#) [Delete](#) [Clone](#)

Department Name Sales Department Owner [yogesh sharma](#) [\[Change\]](#)

Location [Bhopal](#)

Maxx Pay [Rs.550,000.00](#)

Sub Location [C1](#)

Min Pay [Rs.150,000.00](#)

Open date [9/4/2013](#)

Close date [9/12/2013](#)

Status [Open](#)

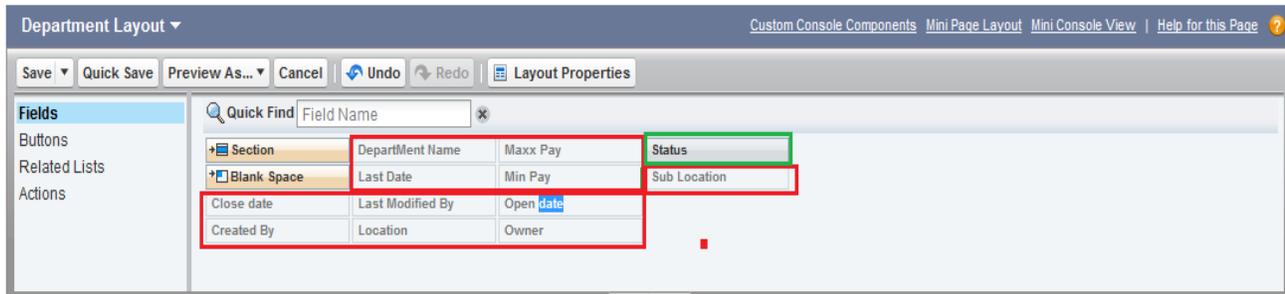
Last Date [9/30/2013](#)

Created By [yogesh sharma](#), 9/10/2013 9:34 AM Last Modified By [yogesh sharma](#), 9/12/2013 3:51 PM

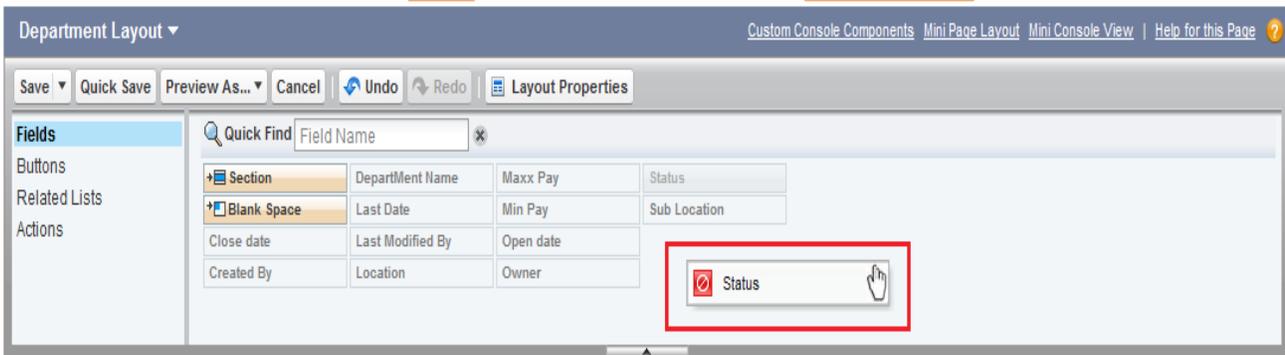
[Edit](#) [Delete](#) [Clone](#)

## 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.

Information (Header visible on edit only)

\* Department Sample Department Name  
Name

Owner Sample User

Location Sample Location

\* Maxx Pay Rs.123.45

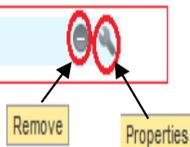
Sub Location Sample Sub Location

\* Min Pay Rs.123.45

\* Open date 9/13/2013

\* Close date 9/13/2013

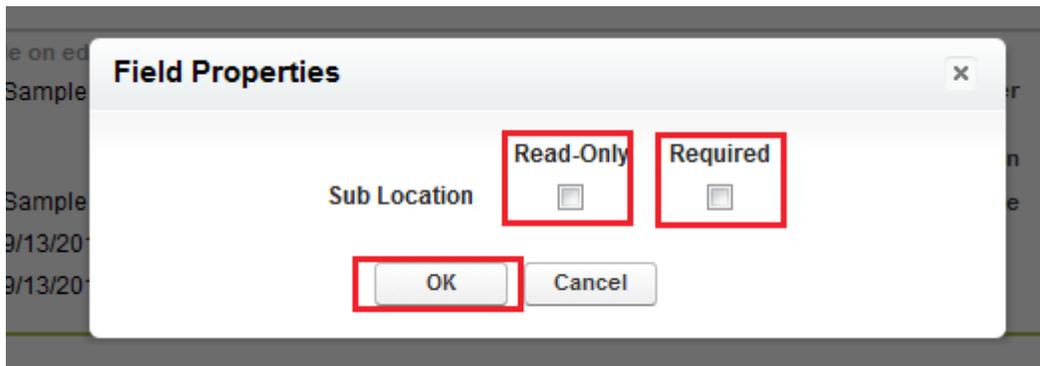
Last Date 9/13/2013



### Step 3 :-

**Remove** :- Click on this icon remove this field .

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

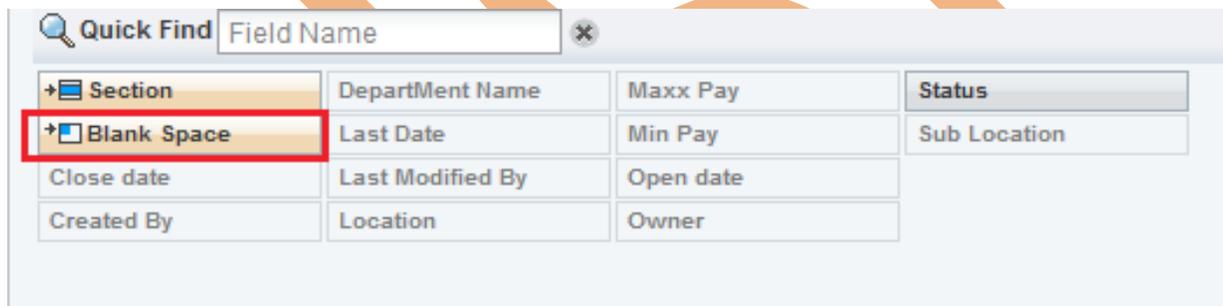


**Read only** :- checked this properties this field read only you can't changes in this filed.

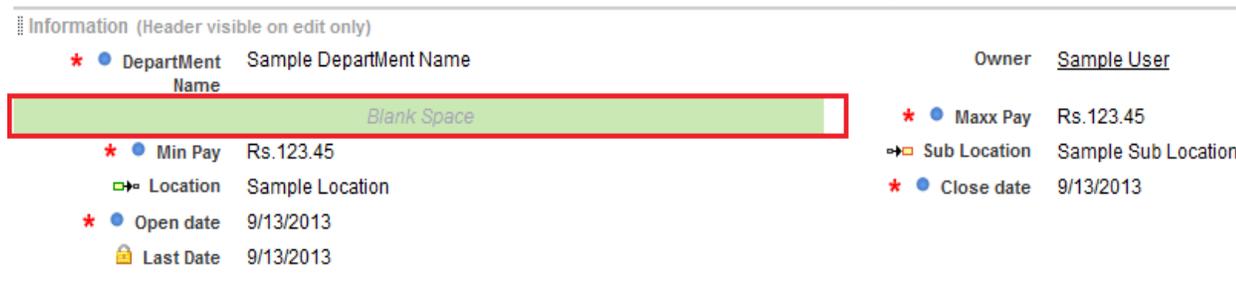
**Required** :- after checked this properties you can't be left blank this field.

### Step 4 :-

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



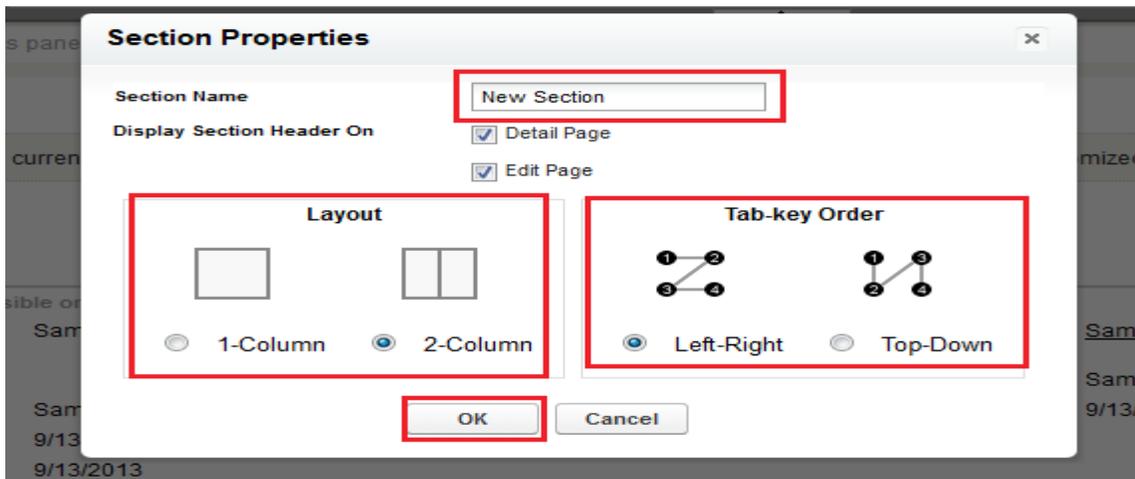
After **drag and drop** you can see how to look **blank space**.



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.

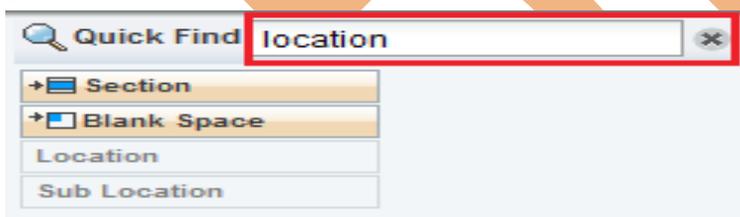


drag and drop **Section** on your page after that drag and drop your field in this section. see below.

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

**Department Edit** Save Save & New Cancel

**Information** [- Required Information]

Department Name  Owner

Location  Sub Location

Open date   Close date

Status

**Pay**

Save Save & New Cancel

## 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**

## Custom Tabs

[Help for this Page](#)

You can create new custom tabs to extend salesforce.com functionality or to build new application functionality.

Custom Object Tabs look and behave like the standard tabs provided with salesforce.com. Web Tabs allow you to embed external web applications and content within the salesforce.com window. Visualforce Tabs allow you to embed Visualforce Pages.

The screenshot shows the Salesforce 'Tabs' management interface. It is divided into three sections: Custom Object Tabs, Web Tabs, and Visualforce Tabs. Each section has a 'New' button and a 'What Is This?' link. The Custom Object Tabs section contains a table with columns for Action, Label, Tab Style, and Description. It lists three tabs: 'Departments' (PDA style), 'Job Applications' (Boat style), and 'Positions' (Books style). The Web Tabs section lists one tab: 'Wiki' (Globe style). The Visualforce Tabs section shows a message: 'No Visualforce Tabs have been defined'.

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.

## New Custom Object Tab

[Help for this Page](#)

The screenshot shows the 'Step 1. Enter the Details' form for creating a new custom object tab. The form has a title bar 'Step 1 of 3' and a subtitle 'Choose the custom object for this new custom tab. Fill in other details.' The main content area includes: a dropdown menu for 'Object' with 'Employee' selected; a 'Tab Style' dropdown with 'Compass' selected and a search icon; an optional section for 'Splash Page Custom Link' with a '--None--' dropdown; and a text area for 'Description'. At the bottom right, there are 'Next' and 'Cancel' buttons. Two callout boxes with arrows point to the 'Object' dropdown and the search icon, with text: 'Select Custom Object' and 'Click here lookup button for selecting Tab Style'.

## 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.

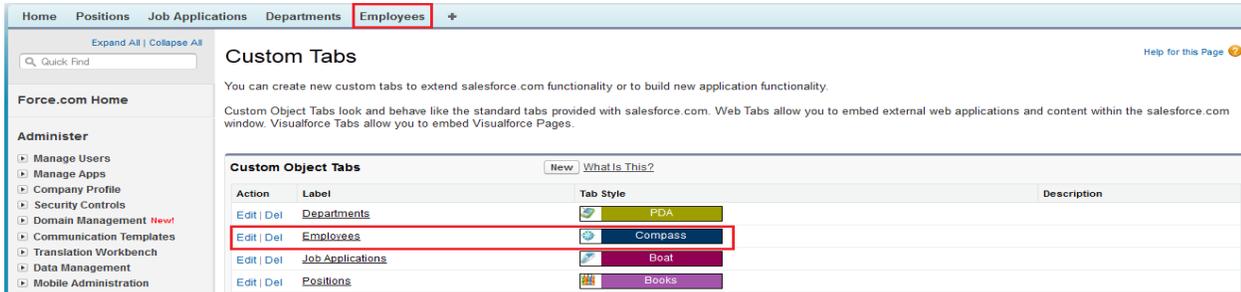
Custom App	<input type="checkbox"/> Include Tab
Platform	<input type="checkbox"/>
Sales	<input type="checkbox"/>
Call Center	<input type="checkbox"/>
Marketing	<input type="checkbox"/>
Sample Console	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Community	<input type="checkbox"/>
Site.com	<input type="checkbox"/>
Salesforce Chatter	<input type="checkbox"/>
Content	<input type="checkbox"/>
Recurment Mangment	<input checked="" type="checkbox"/>
IT Manager	<input type="checkbox"/>

Append tab to users' existing personal customizations

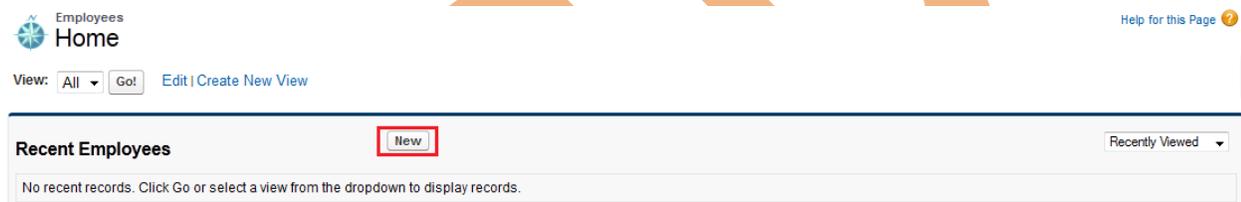
[Previous](#) [Save](#) [Cancel](#)

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**.

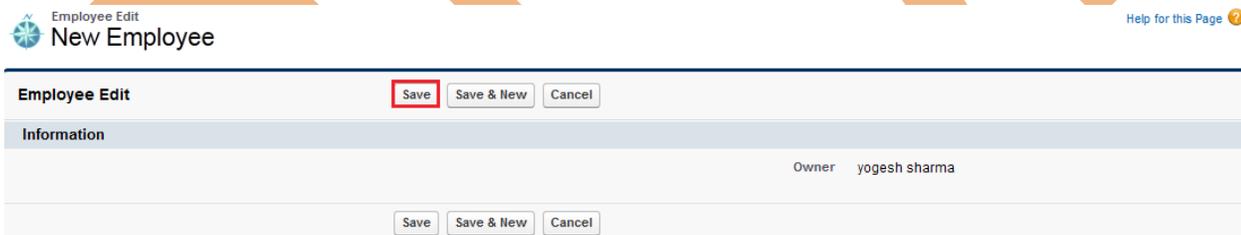


click on **Employee Tab** see below and click to **New** button .



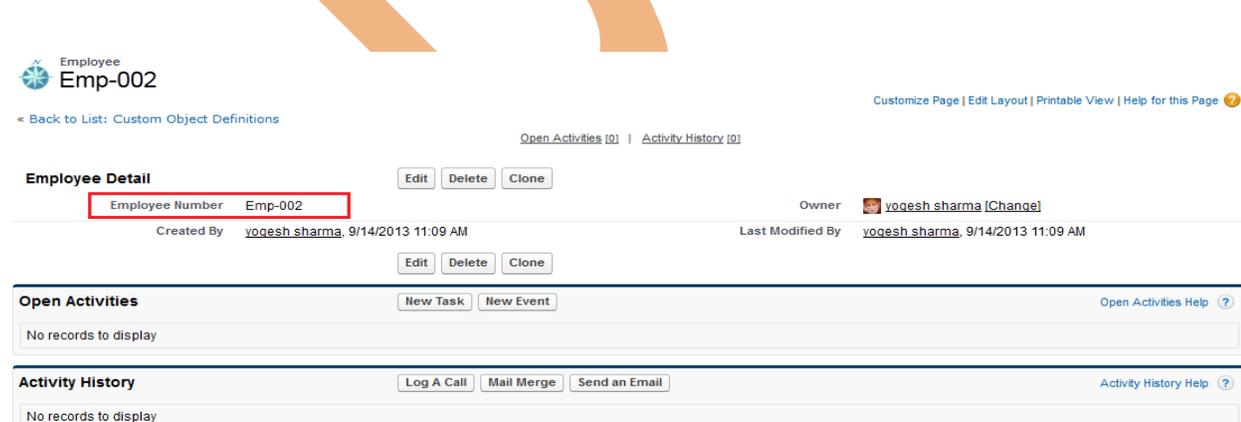
After that

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.



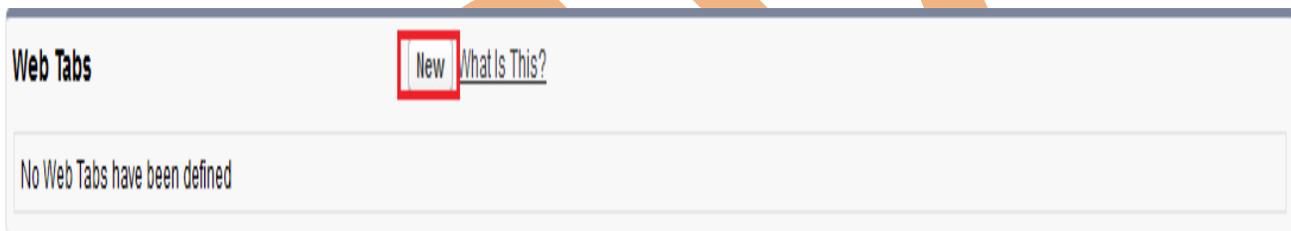
## Custom Web Tabs in Salesforce :

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 .



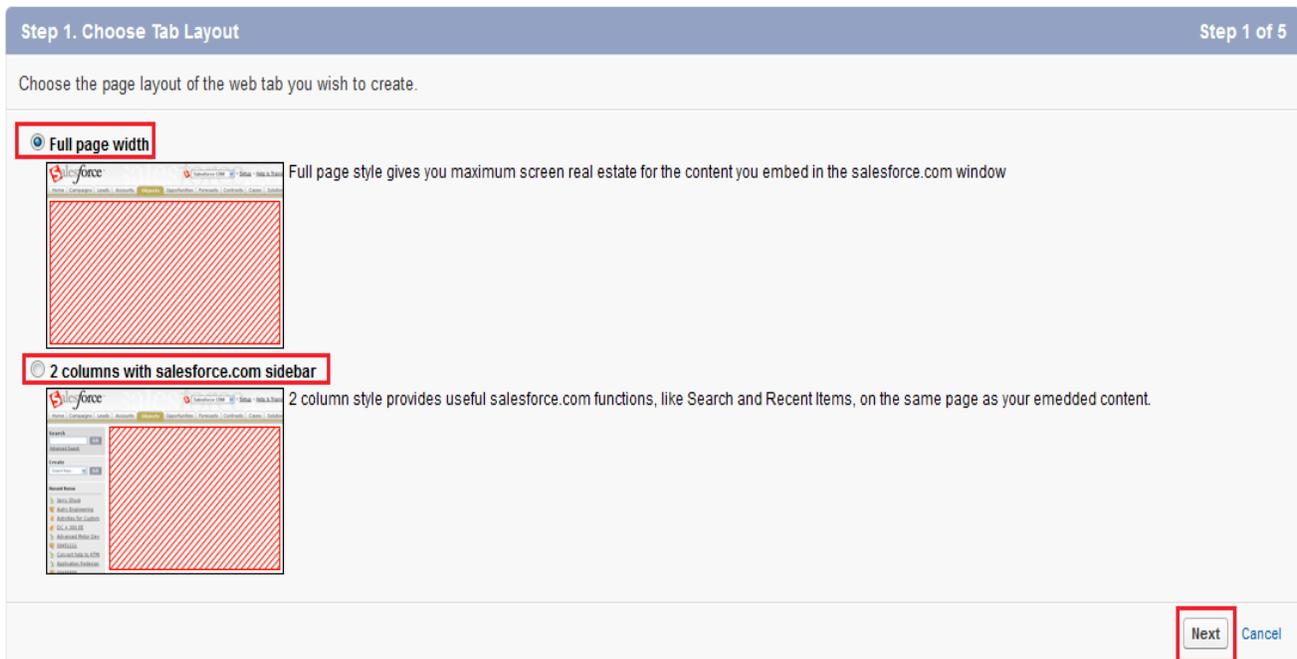
### Step 1 :-

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

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

New Web Tab

[Help for this Page](#)



## Step 2 :-

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

New Web Tab

[Help for this Page](#)

**Step 2. Define Content and Display Properties** Step 2 of 5

Fill in information about the web tab.

**Display Properties**

Tab Label	<input type="text" value="wiki"/>	1
Tab Name	<input type="text" value="wiki"/>	1
Tab Style	<input type="text" value="Globe"/>	2
Content Frame Height (pixels)	<input type="text" value="600"/>	3

Mobile Ready  [What is This?](#)



**Splash Page**

(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

**Description**

Description

## 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.

## New Web Tab

[Help for this Page](#)

**Step 3. Enter the URL Details** Step 3 of 5

Enter the web page address in the Link URL field. You can enter a simple URL just as it appears in the browser address bar, or you can use one or more merge fields to insert organization-specific data from salesforce.com into URL parameters.

**Examples:**

<b>Simple</b>	http://www.google.com
<b>With Merge Field</b>	http://www.google.com/search?q={Org_Name}

**Available Merge Fields**

Available Merge Fields  
Select Field Type  
Organization Fields  
Select Field  
Copy Merge Field Value

Copy and paste the merge field value into your template below.

**Button or Link URL** ! = Required Information

http://

Encoding:

**Step 4 :-**  
Click to **Next** button.

**Step 4. Add to Profiles** Step 4 of 5

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

**Step 5 :-**  
Click to **Save** button.

**Step 5. Add to Custom Apps** Step 5 of 5

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	<input type="checkbox"/> Include Tab
Platform	<input type="checkbox"/>
Sales	<input type="checkbox"/>
Call Center	<input type="checkbox"/>
Marketing	<input type="checkbox"/>
Sample Console	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Community	<input type="checkbox"/>
Site.com	<input type="checkbox"/>
Salesforce Chatter	<input type="checkbox"/>
Content	<input type="checkbox"/>
Recurment Mangment	<input checked="" type="checkbox"/>
IT Manager	<input type="checkbox"/>

Append tab to users' existing personal customizations

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.

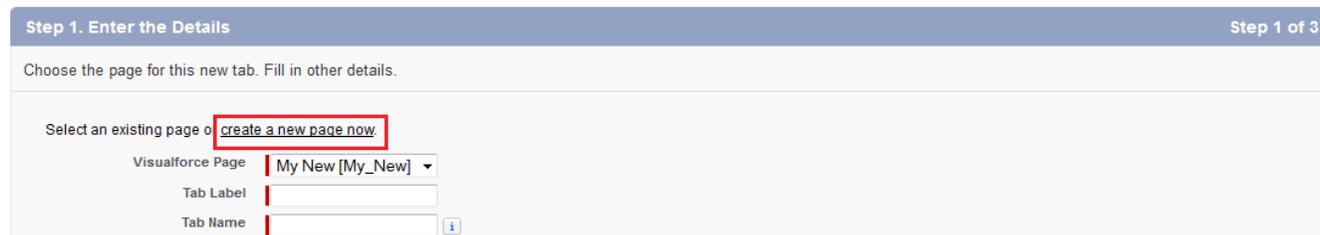
### How to add VisualForce Tab in Salesforce :-

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**.  
New Visualforce Tab [Help for this Page](#)



### 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.

**Page Edit** Save Quick Save Cancel Where is this used? Component Reference

**Page Information** Required Information

Label

Name

Description

Available In Touch

Require CSRF protection on GET requests

**Visualforce Markup** **Version Settings**

```
1 <apex:page>
2 <!-- Begin Default Content REMOVE THIS -->
3 <h1>Congratulations</h1>
4 This is your new Page
5 <!-- End Default Content REMOVE THIS -->
6 </apex:page>
```

## 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.

## New Visualforce Tab

**Step 1. Enter the Details** Step 1 of 3

Choose the page for this new tab. Fill in other details.

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

Visualforce Page  ← Select you VisualForce page create to you by click to **create a new page now** link.

Tab Label

Tab Name  i

Tab Style  🔍

Mobile Ready  [What Is This?](#)

(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

## Step 4 :-

Click to **Next** button.

**Step 2. Add to Profiles** Step 2 of 3

Choose the user profiles for which the new page 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

## Step 5 :-

Click to **Save** button.

**Step 3. Add to Custom Apps** Step 3 of 3

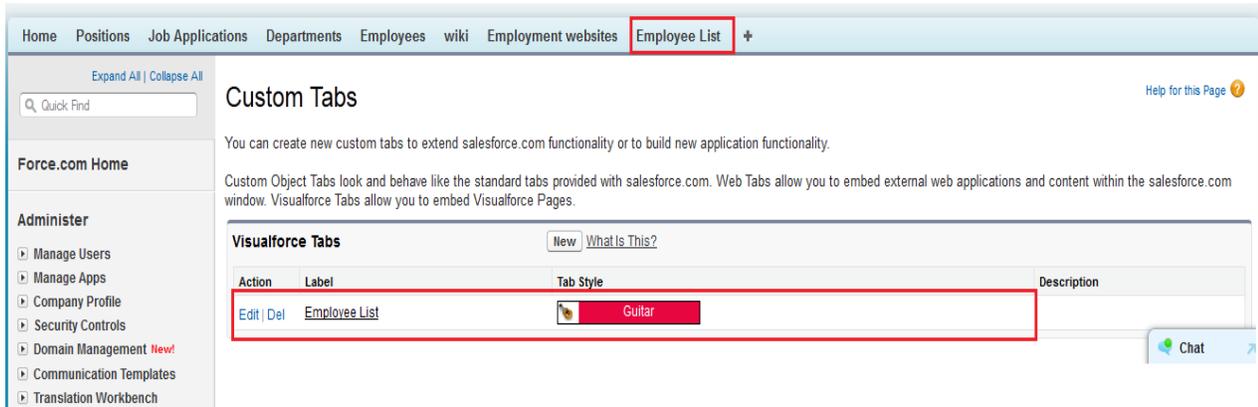
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input checked="" type="checkbox"/> Include Tab
Platform	<input checked="" type="checkbox"/>
Sales	<input checked="" type="checkbox"/>
Call Center	<input checked="" type="checkbox"/>
Marketing	<input checked="" type="checkbox"/>
Sample Console	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Community	<input checked="" type="checkbox"/>
Site.com	<input checked="" type="checkbox"/>
Salesforce Chatter	<input checked="" type="checkbox"/>
Content	<input checked="" type="checkbox"/>
Recurment Mangment	<input checked="" type="checkbox"/>
IT Manager	<input checked="" type="checkbox"/>

Append tab to users' existing personal customizations

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

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

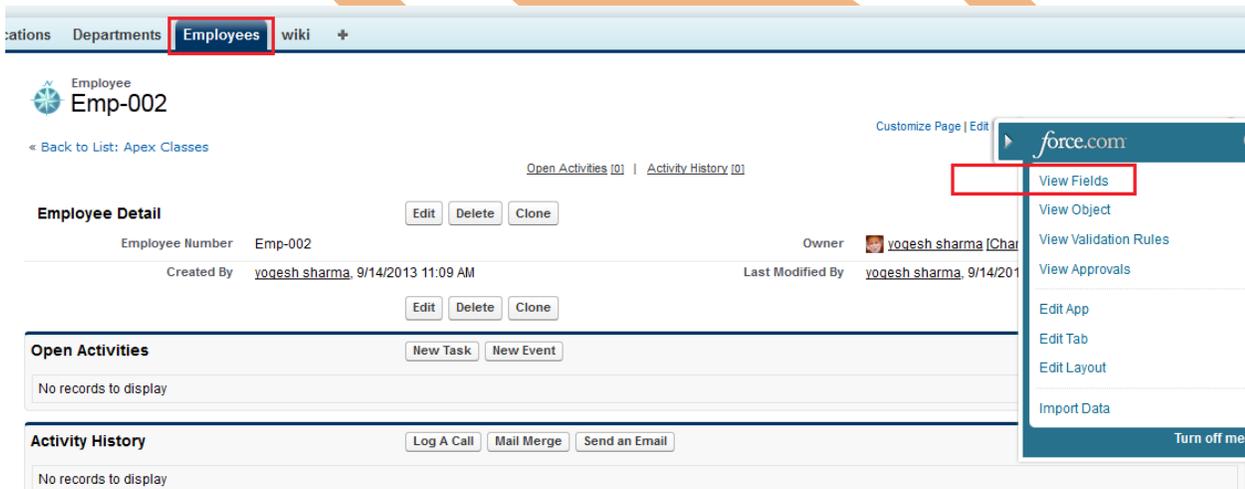


## Add Field in Custom Object in SalesForce

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.

**Employee Edit** Save Save & New Cancel

Information ! = Required Information

First Name	<input type="text" value="Nitin"/>	Owner	yogesh sharma
Mobile Number	<input type="text" value="1234567890"/>		
Email Id	<input type="text" value="abc@gmail.com"/>		

Save Save & New Cancel

These are field

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

Employee  
Emp-003

« Back to List: Custom Object Definitions Customize Page | Edit Layout | Printable View | Help for this Page ?

[Open Activities \(0\)](#) | [Activity History \(0\)](#)

**Employee Detail** Edit Delete Clone

Employee Number	Emp-003	Owner	<a href="#">yogesh sharma [Change]</a>
First Name	Nitin		
Mobile Number	1234567890		
Email Id	<a href="#">abc@gmail.com</a>		
Created By	<a href="#">yogesh sharma, 9/16/2013 10:12 AM</a>	Last Modified By	<a href="#">yogesh sharma, 9/16/2013 10:12 AM</a>

Edit Delete Clone

## 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.

**Custom Object Definition Detail**

Singular Label	Department	Description	Department Description and Mission.
Plural Label	Departments	Enable Reports	<input checked="" type="checkbox"/>
Object Name	Department	Track Activities	<input checked="" type="checkbox"/>
API Name	Department__c	Track Field History	<input checked="" type="checkbox"/>
		Deployment Status	Deployed
		Help Settings	Standard salesforce.com Help Window
Created By	vogesh.sharma	Modified By	vogesh.sharma

**Standard Fields**

Action	Field Label	Field Name	Data Type	Controlling Field	Track History
	Created By	CreatedBy	Lookup(User)		<input type="checkbox"/>
Edit	Department Name	Name	Text(80)		<input type="checkbox"/>
	Last Modified By	LastModifiedBy	Lookup(User)		<input type="checkbox"/>
Edit	Owner	Owner	Lookup(User,Queue)		<input type="checkbox"/>

**Custom Fields & Relationships**

Action	Field Label	API Name	Data Type	Controlling Field	Modified By	Track History
Edit   Del	Close_date	Close_date__c	Date		vogesh.sharma	<input checked="" type="checkbox"/>
Edit   Del	Last Date	Last_Date__c	Formula (Date)		vogesh.sharma	<input type="checkbox"/>
Edit   Del   Replace	Location	Location__c	Picklist		vogesh.sharma	<input type="checkbox"/>
Edit   Del	Maxx Pay	Maxx_Pay__c	Currency(10, 2)		vogesh.sharma	<input type="checkbox"/>
Edit   Del	Min Pay	Min_Pay__c	Currency(6, 2)		vogesh.sharma	<input type="checkbox"/>
Edit   Del	Open date	Open_date__c	Date		vogesh.sharma	<input type="checkbox"/>
Edit   Del   Replace	Status	Status__c	Picklist		vogesh.sharma	<input type="checkbox"/>
Edit   Del   Replace	Sub Location	Sub_Location__c	Picklist	Location	vogesh.sharma	<input type="checkbox"/>

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.

### Department Field History

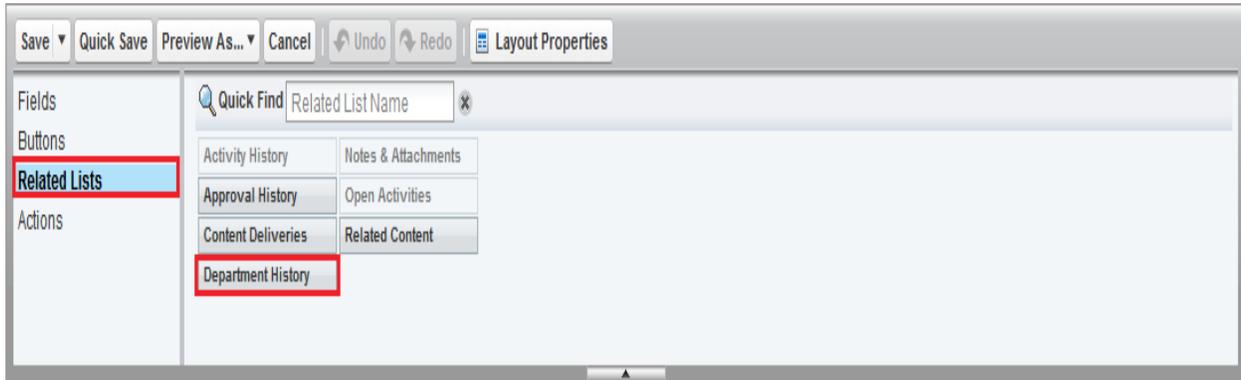
This page allows you to select the fields you want to track on the Department-History related list. Whenever a user modifies any of the fields selected below, the old and new field values are added to the History related list as well as the date, time, nature of the change, and user making the change. Note that multi-select picklist and large text field values are tracked as edited; their old and new field values are not recorded.

**Track old and new values**

Close date	<input checked="" type="checkbox"/>	Department Name	<input type="checkbox"/>
Location	<input type="checkbox"/>	Maxx Pay	<input type="checkbox"/>
Min Pay	<input type="checkbox"/>	Open date	<input type="checkbox"/>
Owner	<input type="checkbox"/>	Status	<input type="checkbox"/>
Sub Location	<input type="checkbox"/>		

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

Department  
Sales Department

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#)

[Back to List: Custom Object Definitions](#)

[Department History \(3\)](#)

**Department Detail** Edit Delete Clone

Department Name Sales Department Owner [yogesh sharma](#) Change

Location [Bhopal](#) Sub Location C2

Open date [9/5/2013](#) Close date [9/13/2013](#)

Last Date [9/30/2013](#)

Status Open

▼ Pay

Min Pay [Rs.150,000.00](#) Maxx Pay [Rs.550,000.00](#)

Created By [yogesh sharma](#) 9/10/2013 9:34 AM Last Modified By [yogesh sharma](#) 9/17/2013 10:00 AM

Edit Delete Clone

**Department History** [Department History Help](#)

Date	User	Action
9/17/2013 9:59 AM	<a href="#">yogesh sharma</a>	Changed Close date from 9/12/2013 to 9/13/2013.
		Changed Open date from 9/4/2013 to 9/5/2013.
9/10/2013 9:34 AM	<a href="#">yogesh sharma</a>	Created.

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