

DOCUMENT

1. Document is a standard object in salesforce lightning platform.
2. Use the standard Tab “Documents” to work with document object.
3. Documents such as docx, image , pdf etc., can be stored in document object.
4. Documents are organized in folders.
5. The folder’s attributes determine the accessibility of the folder and the documents within it.
6. User with at least read permission on Document object can have access to documents tab and hence can read the documents in the folder.
7. User with at write permission on Document object can upload the documents in the folder.
8. Documents are classified as Internal Document and Externally available Image.
9. **Internal Document :**
 - a. These documents can be accessed or shared with only internal users.
 - b. Content of the document is not visible directly.
10. **Externally Available:**
 - a. These documents can be shared with internal users and external users.
 - b. Content of this document is visible directly.
11. Maximum size of the document that we can upload at a time is 5MB.
12. The maximum size for a custom-app logo is 20 KB to be accessible for use the image as log for custom application instead of salesforce standard logo.
13. Documents stored as links cannot be attached to emails, but they save space in your document library.
14. If the option **Don't allow HTML uploads as attachments or document records security setting** is enabled for your organization, you cannot upload files with the following file extensions: .htm, .html, .htt, .htx, .mhtm, .mhtml,.shtm, .shtml, .acgi, .svg.

15. Steps to create Document Folder.

Navigation:

Setup

|--- > TabPanel

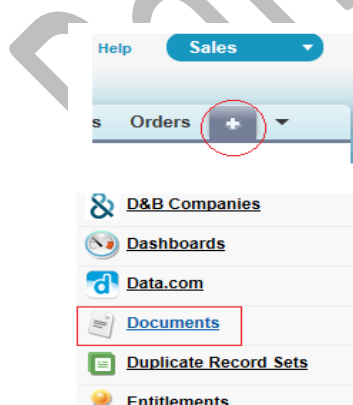
|--- > Click on '+' sign

|--- > Document

|--- > Create Document Folder

To upload an image file, add a new document to the Documents tab. Click on “All Tabs”

 as below and select “Documents” Tab.



1. Enter Folder Name : Capital Info
2. Enter Visibility : Read | Read Write
3. Choose the list of users to whom the folder should be visible.

16. Steps to create a new Document.

Navigation:

TabPanel

|--- >Click on '+' sign

|--- >Documents

|--- >New Document

Step 1: Enter Document Name : Example : Company Logo

Step 2: Enter Unique Name : Example: Company_Logo

Step 3: Choose the document Type as Internal | External :

Example : Externally Available Image

Step 4: Enter Description and keyword

Keyword is used for the searching for this document from search functionality while selecting the document for custom app.

Step 5: Choose the document .

Step 6: Save.

Refer the screen shot below to fill the necessary fields in the document page

The screenshot shows a form titled "1. Enter details" with the following fields and annotations:

- Document Name:** "Company Logo" (Annotation: "Name of your document.")
- Document Unique Name:** "Company_Logo" (Annotation: "A unique name to be used by the API. This will appear automatically.")
- Indicate Document is Internal:** (Annotation: "When checked, a flag is added to the document indicating that document viewers should not share the file outside of the organization.")
- Externally Available Image:** (Annotation: "When checked, a flag is added to the document indicating that document viewers should not share the file outside of the organization.")
- Folder:** "My Personal Documents" (Annotation: "Enable this to select this logo for your App.")
- Description:** "Training Logo" (Annotation: "When checked, a flag is added to the document indicating that document viewers should not share the file outside of the organization.")
- Keywords:** "Training" (Annotation: "Enter keywords that you can use later as search criteria")

2. Select the File

- Enter the path of the file or click browse to find the file.
File to upload: [] Browse...
- Or:**
- Create a reference link to the file. Enter a file location that others can access.
Path/URL to reference: []

3. Click the "Save" button

Save

Click the Cancel button to cancel an in-progress upload

Cancel

Click on browse option to select the image file from your local drive (save your company logo before you do this step) as below.


The screenshot shows the "2. Select the File" section with the following details:

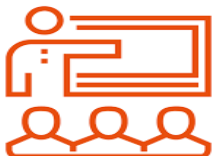
- Enter the path of the file or click browse to find the file.
- File to upload: "C:\Ranjith\Capital Info\7.30 Batch \Training Logo.png" (Annotation: "Click on browse option to select the image file from your local drive...")
- Browse...

Click Save.

Document Detail

[Edit Properties](#) [Delete](#) [Replace Document](#) [Email Document](#)

Document Name	Company Logo
Document Unique Name	Company_Logo
Internal Use Only	<input type="checkbox"/>
Externally Available Image	<input checked="" type="checkbox"/>
Document Content Searchable	<input type="checkbox"/>
Folder	My Personal Documents
Author	 Capital Info Solutions [Change]
File Extension	png
MIME Type	image/png
Size	3KB
Description	Training Logo
Keywords	Training
Image	



Do this in your Org

1. Create New Folder – Training Management Logos
 2. Upload few images files related to companies like Training Consultancy, Health Management related.
 3. Enable them as externally available images.
- Note: Ensure than size is more than 3KB Less than 20KB

1. How to restrict file to be uploaded in extensions: .htm, .html, .htt, .htx, .mhtm, .mhtml, .shtm, .shtml, .acgi, .svg.

Navigation:

Setup

| --- Administer

|---- Security Controls

|----- File Upload and Download Security

Edit and enable the option "Don't allow HTML uploads as attachments or document records"

File Upload and Download Security

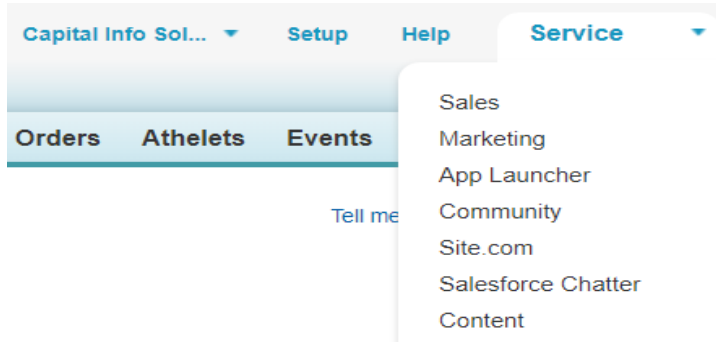
Control how various file types are handled during upload and download.

File Handling Options

Don't allow HTML uploads as attachments or document records [i](#)

1. What is App?

- An *app* is a group of tabs that work as a unit to provide functionality for a business Objective.
- Users can switch between apps using the app drop-down menu at the top-right corner of every page in Classic.



- It can have both Standard and Custom Tabs.
- You can customize existing apps to match the way you work, or build new apps by grouping standard and custom tabs.

Example:

Sales App consists of Tabs such as Lead, Accounts, Contacts, Chatter etc..

2. There are two types of application

- a. Standard Application
- b. Custom Application

3. Standard Application :

- a. Applications created by the salesforce are called standard Application.
Example : Sales, Service, Marketing etc.,
- b. Standard Application cannot be deleted, but they can be customized.

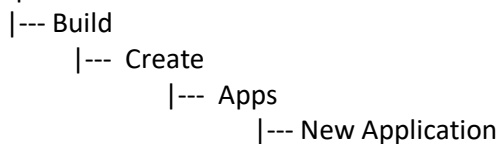
4. Custom Applications :

- a. Applications created by the user are called custom Applications.
- b. They can be deleted or customized as per business requirement.

5. Steps to Create Custom Applications

Classic:

Setup



Apps

An *app* is a group of tabs that work as a unit to provide functionality. Users can switch between apps using the app drop-down menu at the top-right corner of every page in Classic. You can customize existing apps to match the way you work, or build new apps by grouping :

[Custom apps work in conjunction with User Profile Tab Visibility settings. View User Profiles](#)

Apps				
Action	App Label	Console	Custom	Description
Edit	Analytics Studio	<input type="checkbox"/>	<input type="checkbox"/>	
Edit	App Launcher	<input type="checkbox"/>	<input type="checkbox"/>	App Launcher tabs
Edit	Community	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce CRM Communities

Step 1: Choose Application Type: Custom App

This will list two types of App such as Custom App and Console App. Go with default App “Custom App”.

New Custom App

Step 1. Select Type

Select the type of app to create.

Custom app
 Console

Step 2: Enter Application Details:
 App Label : Training Management

Step 2. Enter the Details

Fill in the fields below to define the custom app.

Custom App Information

App Label
 App Name i
 Description

Note: Application will be visible to the users on the UI with App Label
 If we want to refer to the application programmatically then we use app name.

Step 3: Choose the Logo for application

1. Application Logo should externally available Image in the document
2. Size should be lesser than 20KB
3. Width and Height should be 300px and 55px

The logo is available under your personal document folder. Select the logo by click on name “Company Logo” .

File Location [Search in Documents](#)
 Only files 20K or smaller are shown.

Name	Author	Size	Internal Use Only
<u>Company Logo</u>	CSolu	3KB	<input type="checkbox"/>

Step 4: Choose the tabs

1. Choose the tabs that should be visible in the application.
2. Choose Default landing tab
 - a. Tab, which is chosen as default landing tab, Content of that tab will be visible on the homepage of the application.
 Example : Choose Lead, Account, Contact, Opportunity
 Default Landing: Account

Note: Home tab is the default one cannot be removed from the app.

New Custom App

Step 4. Choose the Tabs

Choose the tabs to include in this custom app.

Available Tabs		Selected Tabs
Reports	<input type="button" value="Add"/> <input type="button" value="Remove"/>	Home
Scorecards		Chatter
Service Contracts		Trainings
Site.com		
Solutions		
Streaming Channels		
Profile		
User Provisioning Requests		
Analytics		
Feedback		
Performance Cycles		
Libraries		
Orders		
Quickstart		

Up
Down

Step 5: Choose the profile for whom the application should be visible.
Example : System Administrator

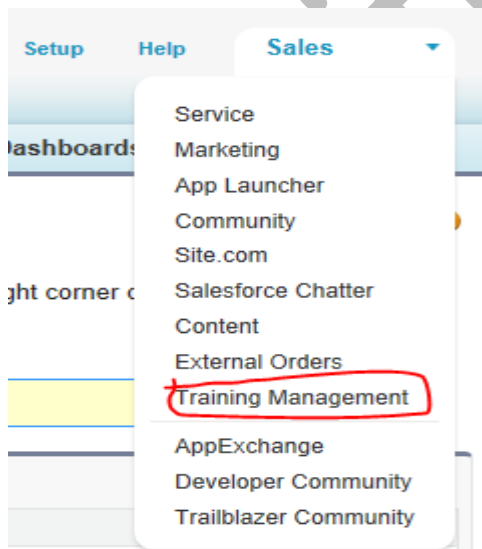
New Custom App

Step 5. Assign to Profiles

Choose the user profiles for which this custom app will be visible in the AppExchange menu. You may specify this custom app as the default custom app of a profile, meaning that new users who have the profile will see this custom app when they log in for the first time.

	<input type="checkbox"/> Visible
Standard User	<input type="checkbox"/>
System Administrator	<input checked="" type="checkbox"/>

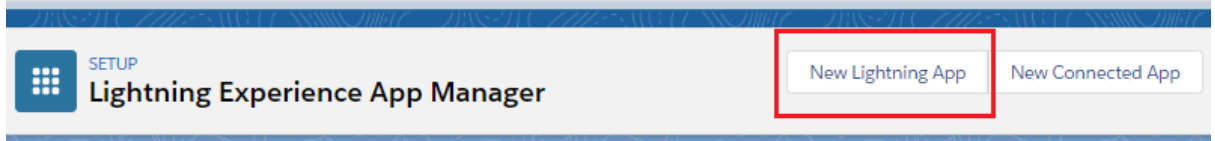
Now the custom App is included in menu at the top right.



HOW TO CREATE A LIGHTNING APP?

Lightning:

- Setup
 - |--- Platform Tools
 - |--- Apps
 - |--- App Manager
 - |--- New Lightning App



Step 1: Enter AppDetails

- a. Enter App Name : Mutual Funds
- b. Developer Name : Mutual_Funds
- c. Enter Description:
- d. Choose the Logo

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name ⓘ
Mutual Fund

*Developer Name ⓘ
Mutual_Fund

Description ⓘ
Enter a description...

Used by the API and managed packages, this name must be unique across all apps.

App Branding

Image ⓘ

Primary Color Hex Value ⓘ
#0070D2

Upload

Org Theme Options
 Use the app's image and color instead of the org's custom theme

Step 2: Choose the Navigation Type

- a. Choose Navigation as Standard Navigation

Step 3: Choose Utility Bar items

- a. Choose Chatter, History

Step 4: Choose the tabs for the application

Account, Case, Contact

Step 5: Choose the profile for which the application should be visible.

Example: System Administrator

User Profiles

Choose the user profiles that can access this app.

Available Profiles

system

Selected Profiles

System Administrator

Step 6: Save & Finish

Q:: How many custom Applications can be created in DE Org?

Edition	No Applications
Developer	10
Professional	255
Enterprise	260
Unlimited	Unlimited

Note: We can upgrade the classic application as Lightning version

Setup

- |--- >Build
 - |--- > Create
 - |--- > Apps
 - |--- > Choose the application
 - |--- > Edit
 - |--- > Enable Show in lightning version

Note: If you want to upgrade the classic application to lightning

Setup

- |--- >Build
 - |--- > Create
 - |--- > Apps
 - |--- > Choose the App
 - |--- > Edit

Note : Classic version of the application still remains the same ,but one more instance of the application in the lightning version will be created.

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