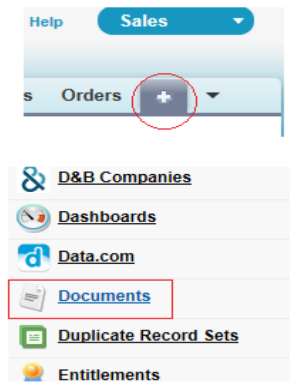
## DOCUMENT

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.

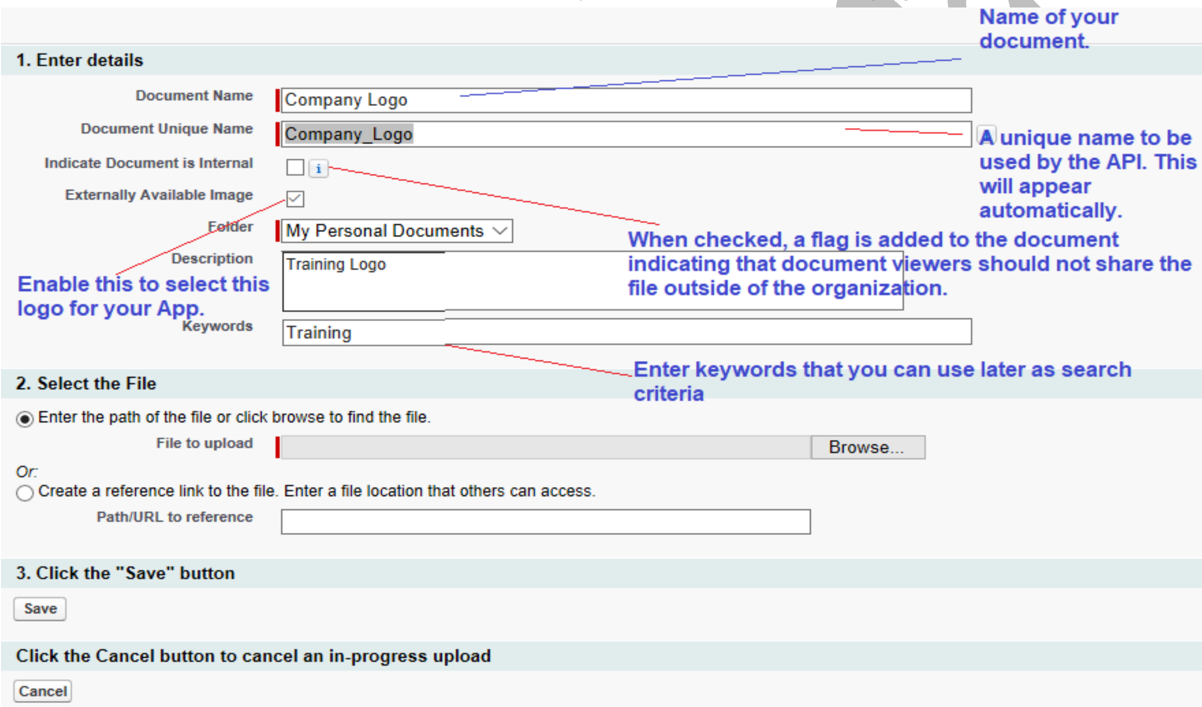
16. Steps to create a new Document.

Navigation:

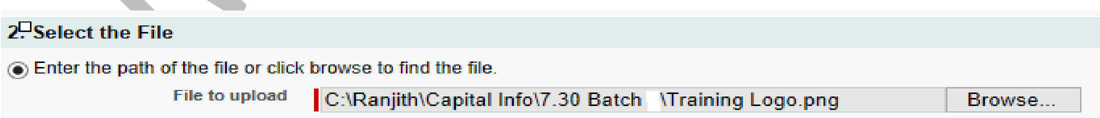
TabPanel
|--- >Click on '+' sign
|--- >Documents
|--- >New Document

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




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

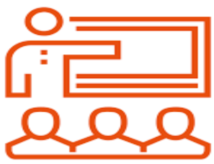



Click Save.

Document
Company Logo
« Back to List: Custom Apps

**Document Detail** Edit Properties | Delete | Replace Document | Email Document

| | |
|---|---|
| Document Name | Company Logo |
| Document Unique Name | Company_Logo |
| Internal Use Only | ☐ |
| Externally Available Image | ✓ |
| Document Content Searchable | ☐ |
| 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

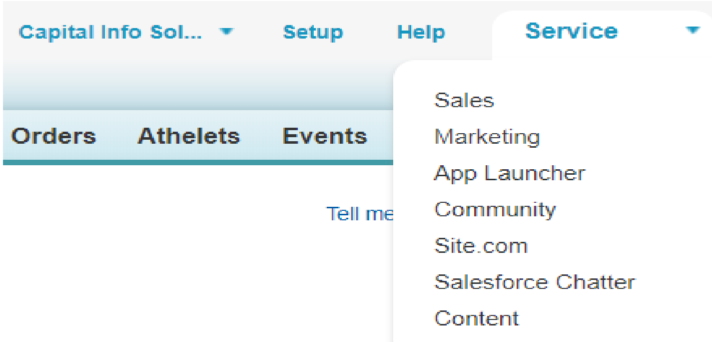
Control how various file types are handled during upload and download.

## File Handling Options

☐ Don't allow HTML uploads as attachments or document records

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

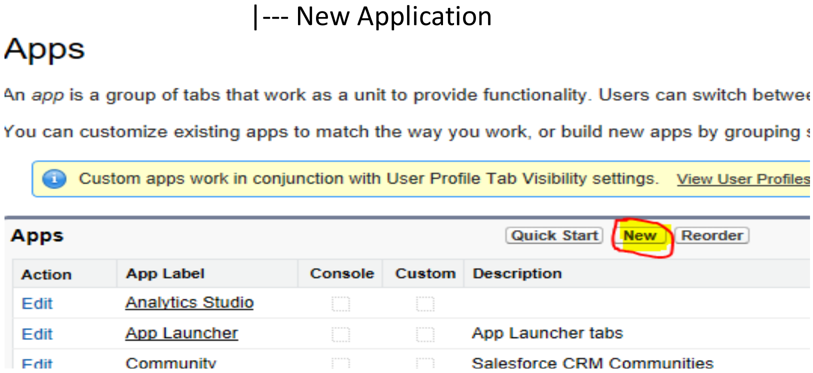
3. **Standard Application :**
   a. Applications created by the salesforce are called standard Application.
      Example : Sales, Service, Marketing etc.,
   b. Standard Application cannot be deleted, but they can be customized.

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**

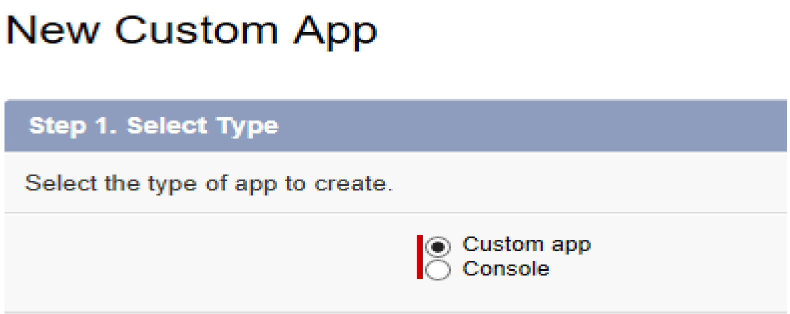
**Classic:**

Setup
|--- Build
   |--- Create
      |--- Apps
         |--- New Application



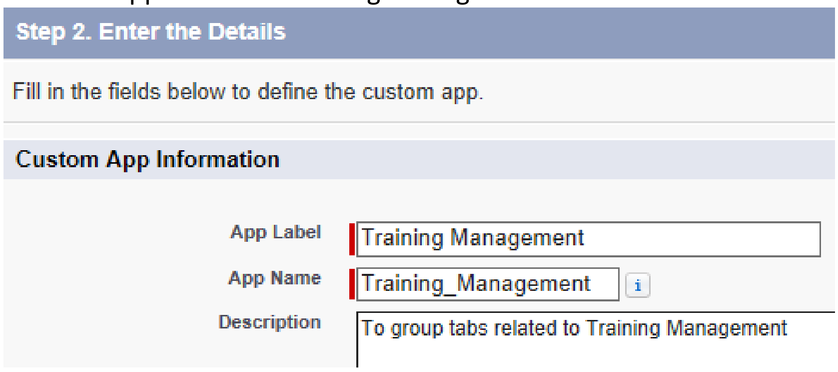

**Step 1**: Choose Application Type: Custom App

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




**Step 2**: Enter Application Details:

App Label : Training Management



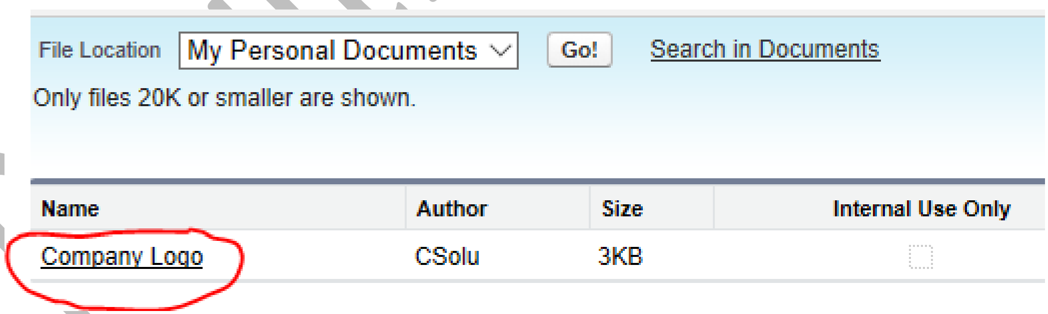

**Note**: Application will be visible to the users on the UI with App Label

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" .



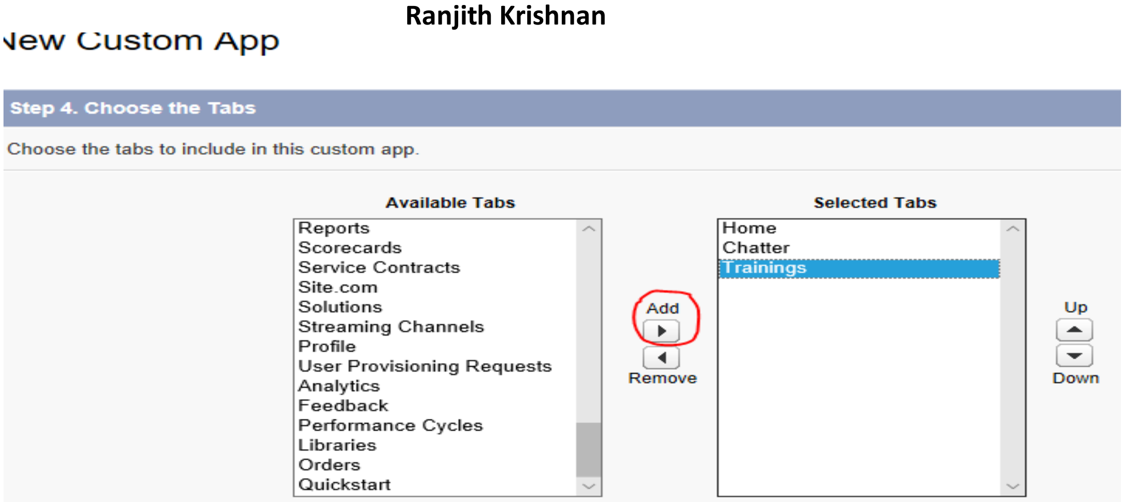

**Step 4:** Choose the tabs

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

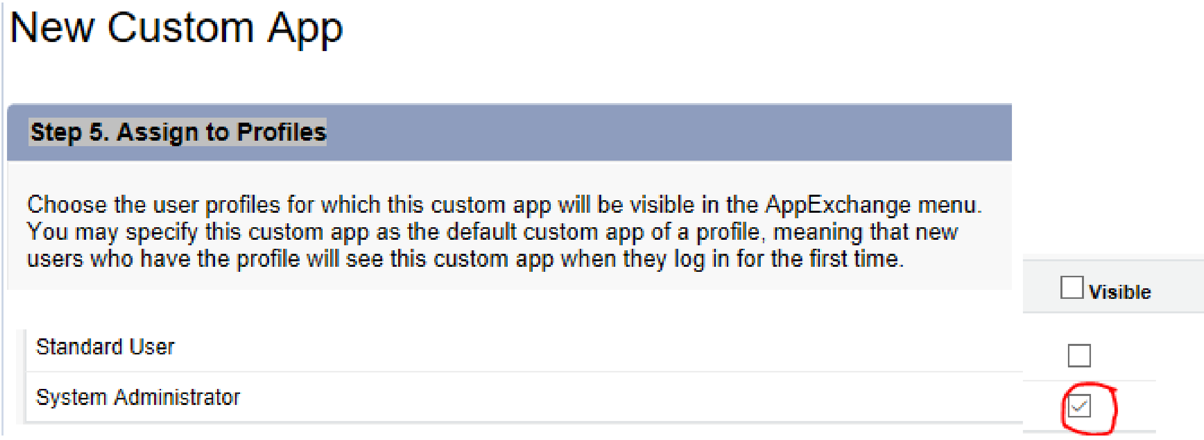
   Default Landing: Account

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

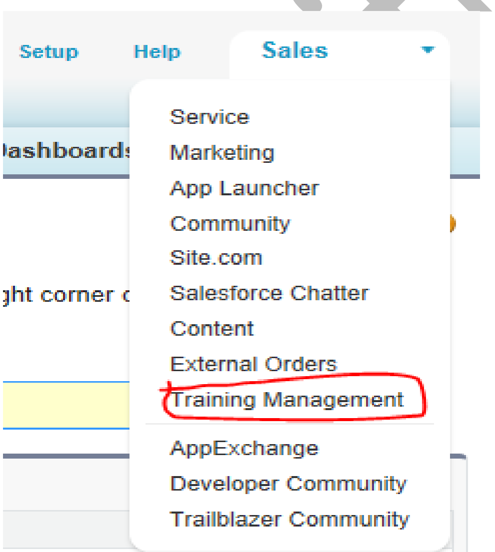



**Step 5:** Choose the profile for whom the application should be visible.

Example : System Adminstrator



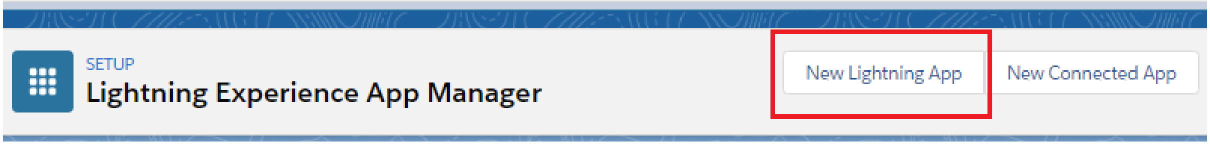

Now the custom App is included in menu at the top right.



**HOW TO CREATE A LIGHTNING APP?**

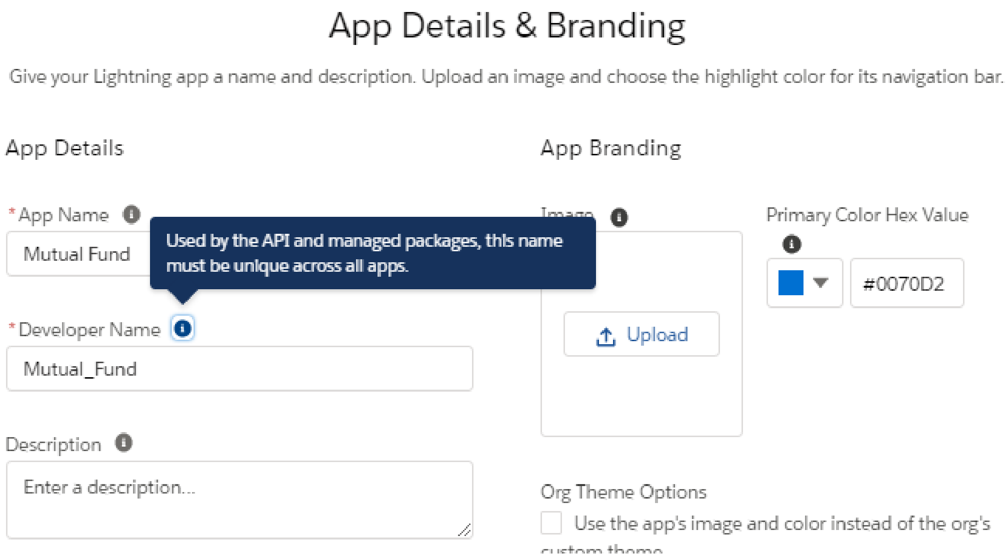
**Lightning:**

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




**Step 2:** Choose the Navigation Type

a. Choose Navigation as Standard Navigation

**Step 3:** Choose Utility Bar items

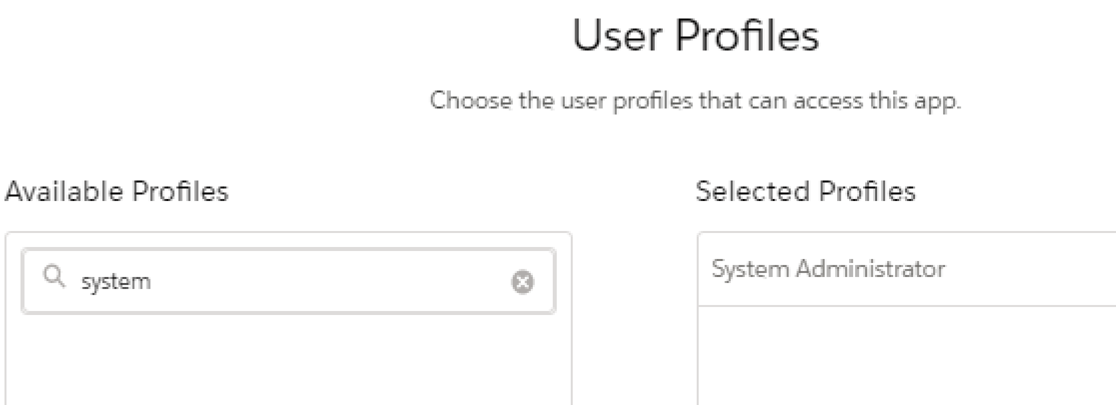
a. Choose Chatter, History

**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




**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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