

Create Custom Apps for Salesforce Classic

Create custom apps to give Salesforce Classic user's access to everything they need all in one place. If the objects have already created, tabs, and fields needed for the app, follow steps listed below. With this option, one can create an app label and logo, add items to the app, and assign the app to profiles.

1. From Setup, enter Apps in the Quick Find box, then select Apps.
2. Click New.
3. If the Salesforce console is available, select whether you want to define a custom app or a Salesforce console.
4. Give the app a name and description. An app name can have a maximum of 40 characters, including spaces.
5. Optionally, brand your app by giving it a custom logo.
6. Select which items to include in the app.
7. Optionally, set the default landing tab for your new app using the Default Landing Tab drop-down menu below the list of selected tabs. This determines the first tab a user sees when logging into this app.
8. Choose which profiles the app will be visible to.
9. Check the Default box to set the app as that profiles default app, meaning that new users with the profile see this app the first time they log in. Profiles with limits are excluded from this list.
10. Click Save

Creating a Custom App in Salesforce Classic

1. **Switch to Salesforce Classic**
 - If you're in Lightning Experience, click your profile picture or name in the top-right corner and select **Switch to Salesforce Classic**.
 2. **Go to Setup**
 - Click **Setup** in the top-right corner.
 3. **Navigate to Apps**
 - In the left-hand menu, under **Build**, expand **Create** and click **Apps**.
 4. **Create a New App**
 - Click **New**. Choose **Custom App** (not Console App, unless you're building a specific console-style app).
 5. **Enter App Details**
 - **App Label**: Name your app (e.g., "Marketing App").
 - **App Name**: Auto-populates but can be edited (for API use).
 - **Description**: Add a brief purpose (optional).
 - Click **Next**.
 6. **Add a Custom Logo (Optional)**
 - Upload an image (GIF/JPEG, max 20 KB, 55x300 pixels recommended) from the Documents tab.
 - Click **Next**.
 7. **Select Tabs**
 - Add tabs (e.g., Home, Leads, Campaigns) from **Available Tabs** to **Selected Tabs**.
 - Arrange their order (first tab is the default).
 - Click **Next**.
 8. **Assign to Profiles**
 - Select profiles that can access the app and set it as **Visible** or **Default**.
 - Click **Save**.
 9. **Test the App**
 - From the app dropdown in the top-right corner, select your app and verify the tabs.
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Creating a Custom App in Salesforce Lightning Experience

1. **Go to Setup**
 - In Lightning Experience, click the **Gear Icon** in the top-right corner and select **Setup**.
2. **Navigate to App Manager**
 - In the left-hand menu, under **Platform Tools**, click **Apps > App Manager**.
3. **Create a New Lightning App**
 - Click **New Lightning App** (for Lightning apps; Classic apps are managed separately).
4. **Define App Details**
 - **App Name:** Enter a name (e.g., "Service Team App").
 - **Description:** Add a purpose (optional).
 - **App Branding:** Upload a logo (300x55 pixels recommended, PNG/JPG/GIF, max 5 MB) and pick a primary color.
 - Click **Next**.
5. **Customize App Options**
 - **App Options:** Choose supported features (e.g., Console Navigation, Utility Bar).
 - Add items to the Utility Bar if desired (e.g., quick access tools like Notes or History).
 - Click **Next**.
6. **Select Navigation Items**
 - Add tabs or Lightning pages (e.g., Home, Accounts, Reports) to the app's navigation menu.
 - Use the **Add** button and reorder as needed.
 - Click **Next**.
7. **Assign to Profiles**
 - Choose which profiles can access the app (e.g., "System Administrator," "Standard User").
 - Click **Next**, then **Save & Finish**.
8. **Test the App**
 - From the **App Launcher** (9-dot grid icon), search for your app, launch it, and confirm the navigation items work as expected.

Key Differences

- **Interface:** Classic apps are built in the older Salesforce Classic interface, while Lightning apps are designed for the modern Lightning Experience.
 - **Features:** Lightning apps support advanced options like the Utility Bar and Lightning pages, unavailable in Classic.
 - **Visibility:** Classic apps can be made visible in Lightning via App Manager settings, but Lightning apps are native to Lightning Experience.
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Additional Tips

- **Permissions:** You need "Customize Application" permission to create apps.
- **Tabs:** Ensure the tabs or objects you want are available (create them via **Setup > Create > Tabs** if needed).
- **Testing:** Always test the app with different profiles to confirm accessibility.