



AppsME Custom Layout Guide Salesforce Ver.

Ver.1.0

Revision History

Ver.	Date	Content
1.0	2020/04/07	Newly Issued

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How to use this manual

This manual is a custom layout guide of “AppsME” (Salesforce ver.) provided by OPRO Co., Ltd.

Our purpose is for you to understand the procedure to customize layouts in AppsME on a mobile terminal, which display records in Salesforce.

Conventions used in this manual

The following conventions are used in this manual.

Convention	Content
Note	Describes notes on operation
Point	Describes tips on operation.
Ref.	Describes a reference in this manual.
[]	Used when describing button names, tab names, keys on keyboard, etc.
“ ”	Used when describing system names, menu names, item names, references, etc.

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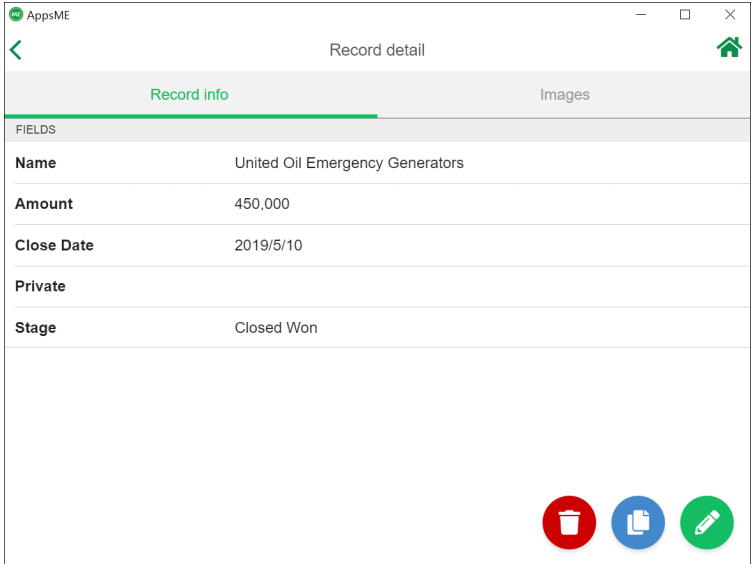
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1. Introduction

Here, overview of “Custom Layout” function is explained.

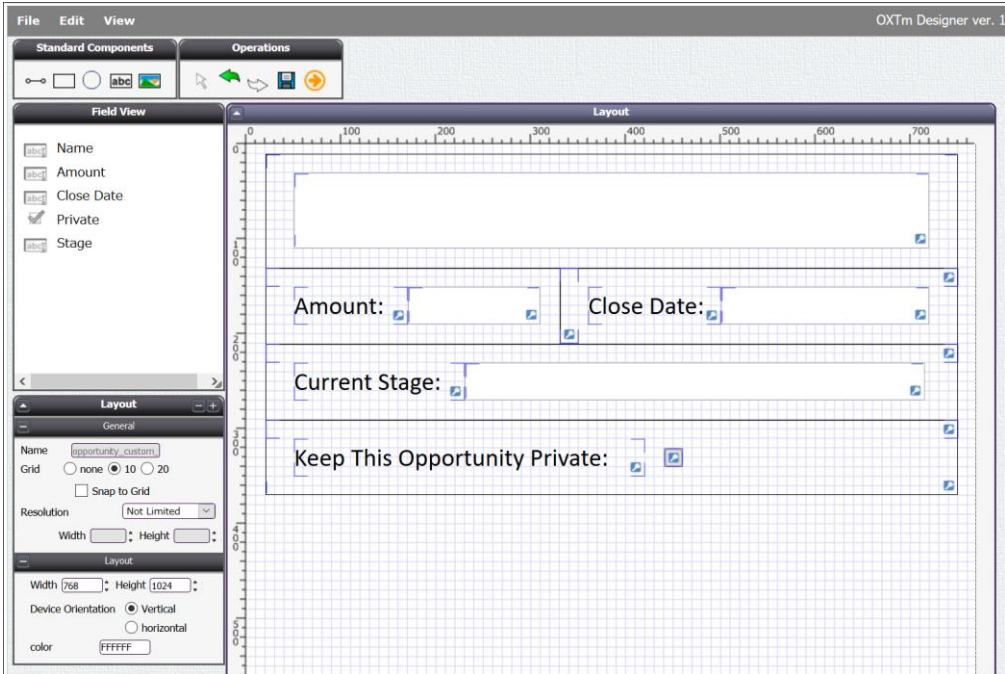
AppsME enables you to view/edit records in Salesforce from your mobile terminal.

Record detail screen looks like below by default, but you can customize this layout to make it more usable.



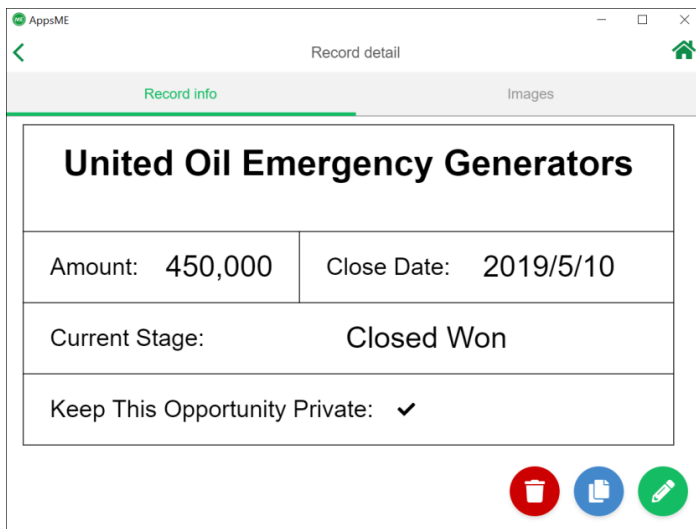
Custom layouts can be created with OPROARTS Designer.

[Ref.] 4. Setup Custom Layout



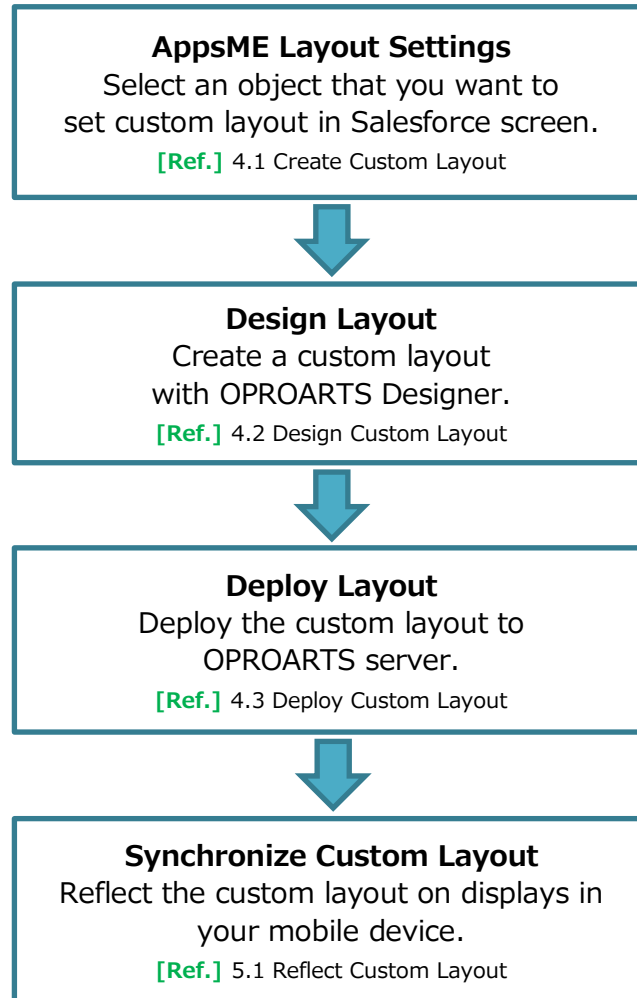
After you create a custom layout and synchronize the layout on your mobile terminal with the one you created, detail screen's layout reflects your customization.

[Ref.] 5. Settings on Mobile Device



2. Overall Flow

This is actual flow from creating a custom layout to reflecting it to record screen on AppsME.



3. OPROARTS Settings

To create custom layouts, you need to use OPROARTS's function.
Install OPROARTS Connector and register "LAD" record.

3.1 Install OPROARTS Connector

In AppExchange, get "OPROARTS Connector".

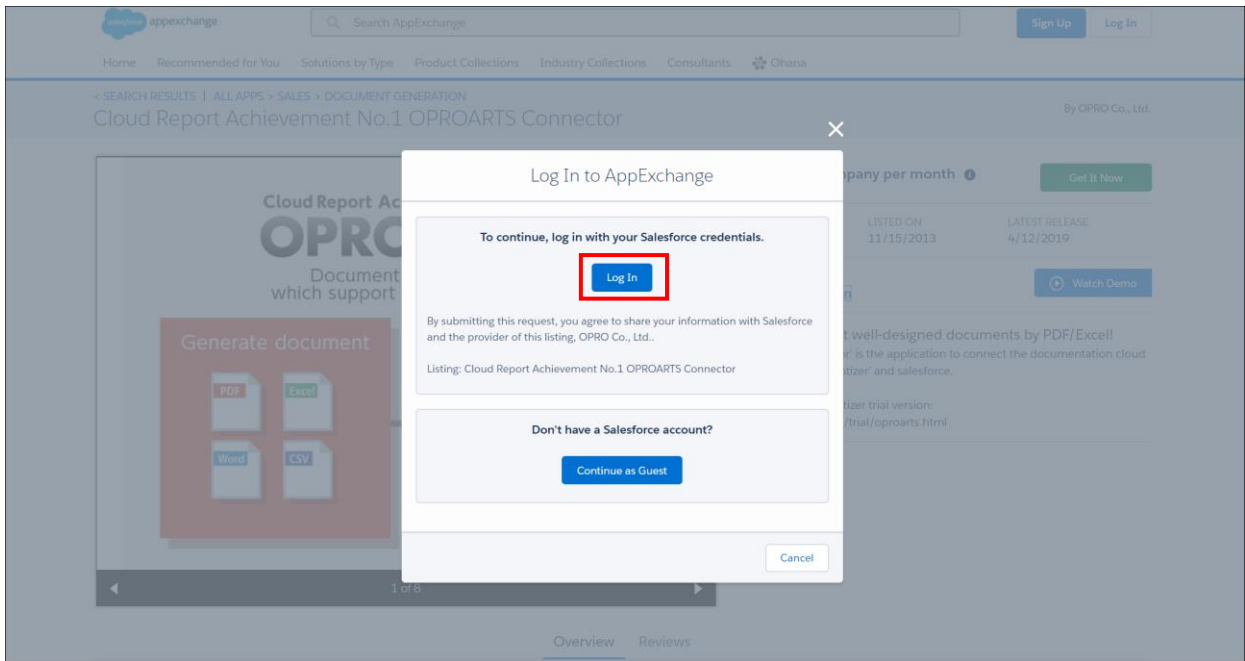
1. Access to this URL and click [Get It Now] button.
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3000009wqmWEAQ>

The screenshot displays the Salesforce AppExchange listing for the OPROARTS Connector. The page header includes the Salesforce AppExchange logo and navigation links. The main content area features a large video player with the title "Cloud Report Achievement No.1 OPROARTS Document Framework which support multiple objects". The video player shows two main sections: "Generate document" (PDF, Excel, Word, CSV) and "Delivery" (Email/Raw/Posting, Web delivery/SMS, Electronic contract, time stamp, Storage, BI tool). To the right of the video player, there is a price tag of "\$30 USD per company per month" and a "Get It Now" button highlighted with a red box. Below the price tag, there is a rating of 0 stars, a "LISTED ON" date of 11/15/2013, and a "LATEST RELEASE" date of 4/12/2019. There is also a "Watch Demo" button. The page footer includes "Overview" and "Reviews" links.

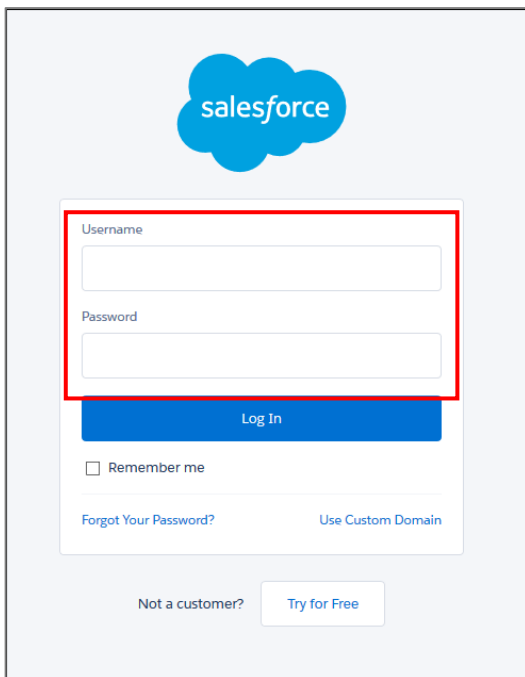
Point

If the link is unavailable, search "OPROARTS" in AppExchange site.

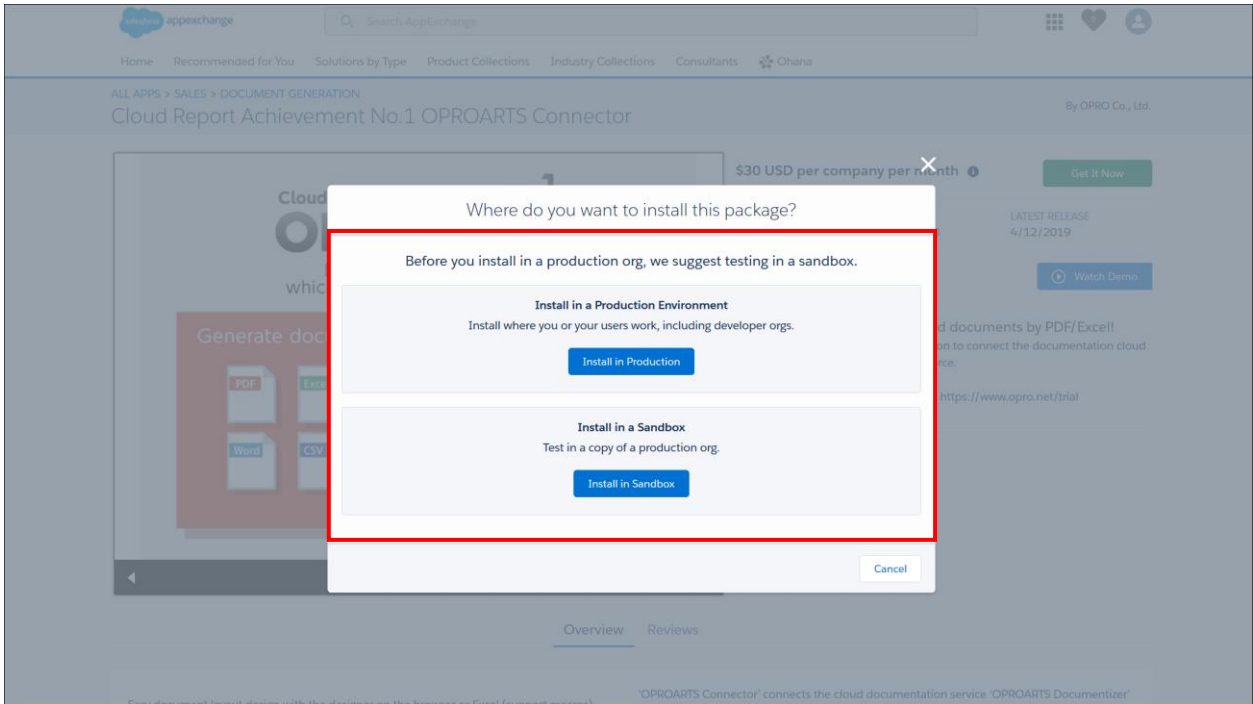
2. "Log In to AppExchange" pop-up is displayed. Click [Log In] button.



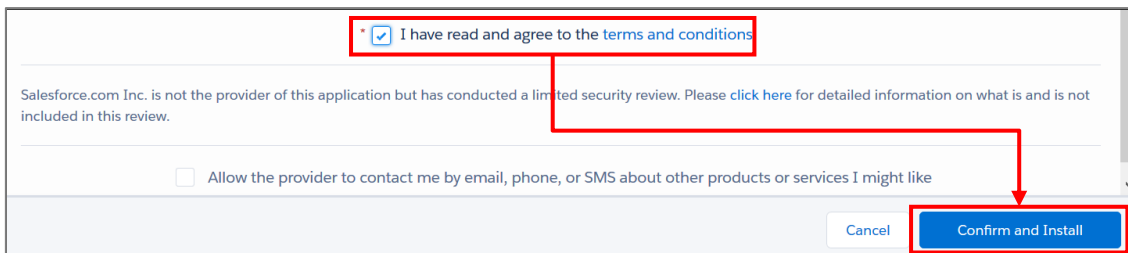
3. Enter username and password of the user who has admin privilege on the org where you want to install the package. Then click [Log in] button.



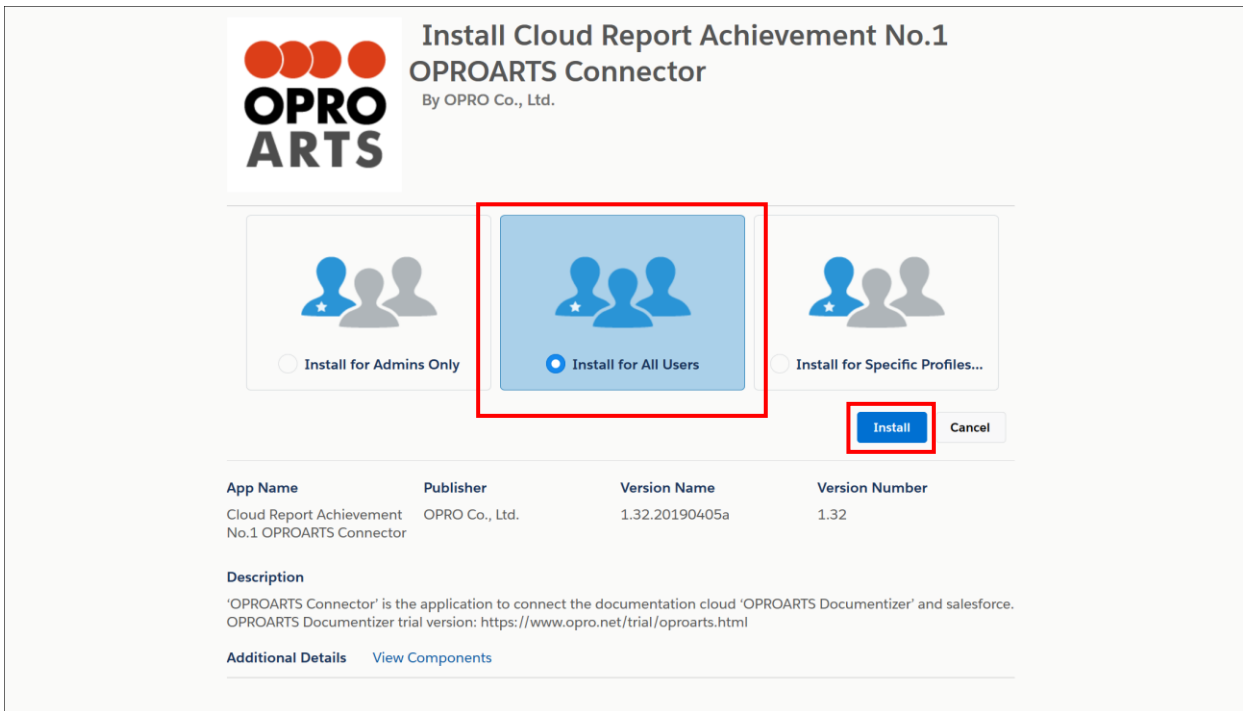
4. "Where do you want to install this package?" screen is displayed. Select the org where you install the package.



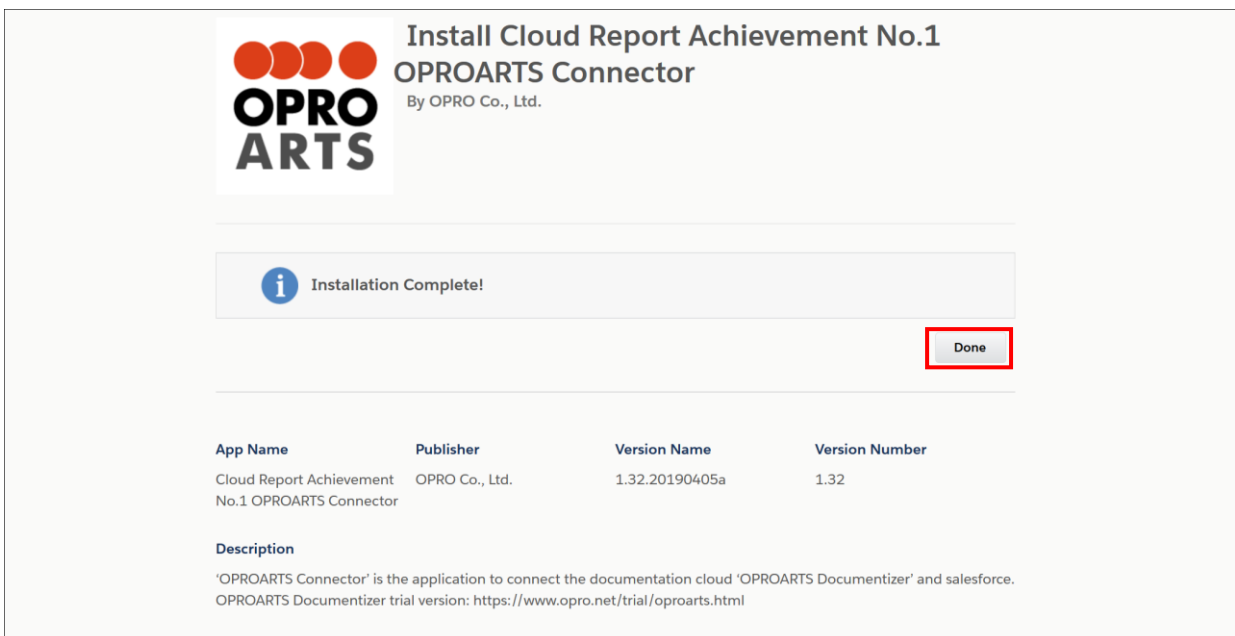
5. Read over terms and conditions and check "I have read and agree to the terms and conditions". Click [Confirm and Install] button.



6. "Install Cloud Report Achievement No.1 OPROARTS Connector" screen is displayed. Select the users for whom you install the package, then click [Install] button.



7. After installation, "Installation Complete!" message is displayed. Click [Done] button.



Point

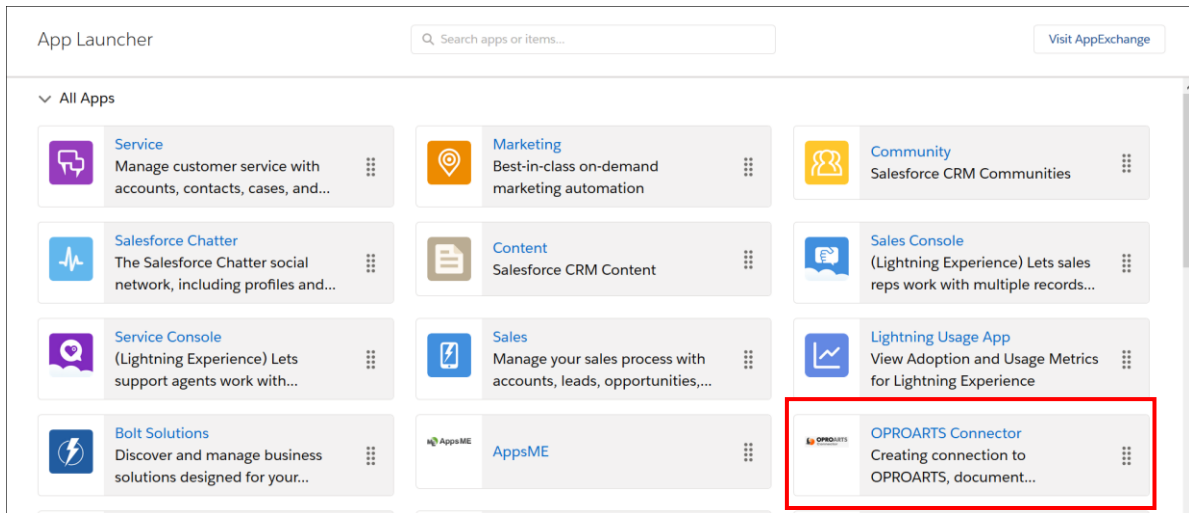
Installation completion is also notified by email.

3.2 Register “LAD” Record

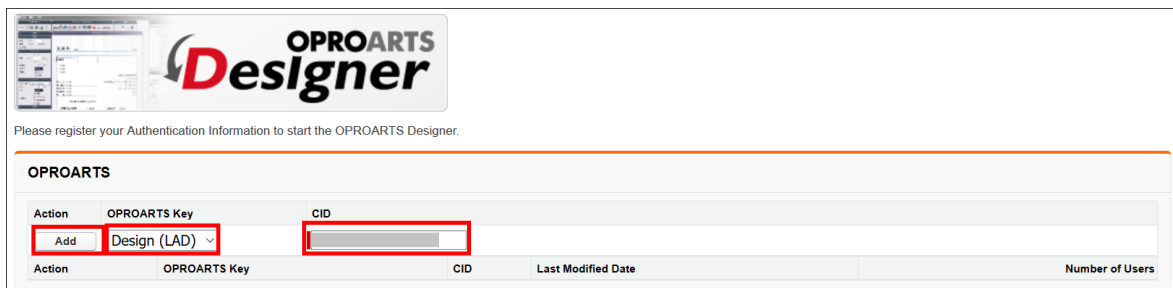
You need OPROARTS license “LAD” to create/use custom layouts.

So, create “LAD” record in “OPROARTS Connector” app and register Salesforce users to it.

1. Click “OPROARTS Connector” in the application launcher.



2. Click “OPROARTS Connector” tab, then enter OPROARTS CID, select “Design (LAD)” for OPROARTS, and click [Add].



3. Click the “LAD” record.

Please register your Authentication Information to start the OPROARTS Designer.

OPROARTS

Action	OPROARTS Key	CID	Last Modified Date	Number of Users
Add	Output (LA) ▾	<input type="text"/>		
Edit Delete	LAD	<input type="text"/>	2020/04/06 14:51	0

4. Select a Salesforce user who creates custom layouts, enter OPROARTS UID/UPW, then click [Add].

OPROARTS LAD (CID:) [Help for this Page](#)

[← Back to List: OPROARTS](#)

OPROARTS Users

Action	User	UID	UPW
Add	User ▾	<input type="text"/>	<input type="text"/>
Action	User	UID	Last Modified Date

OPROARTS Connector
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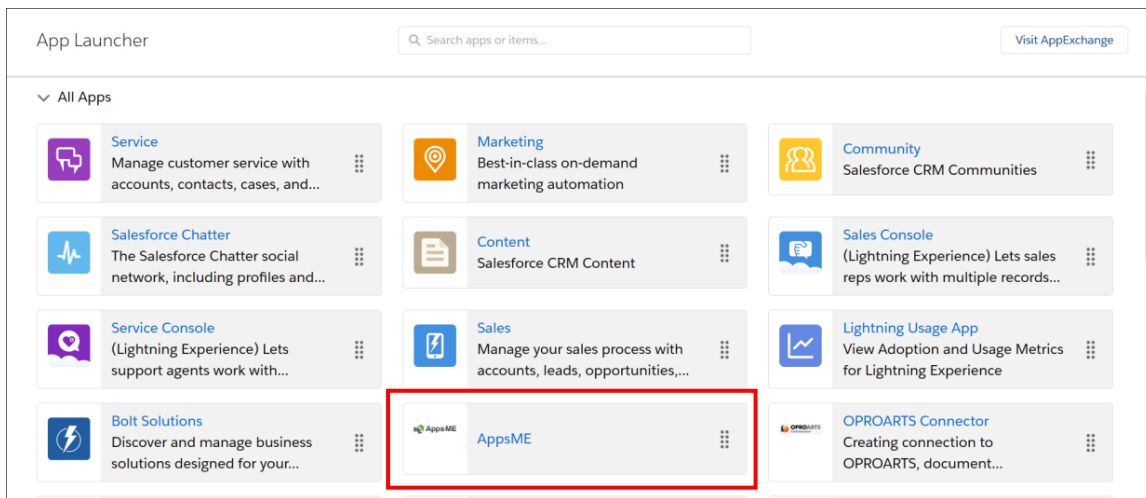
After completing these steps, custom layouts can be created by the Salesforce user you selected.

4. Setup Custom Layout

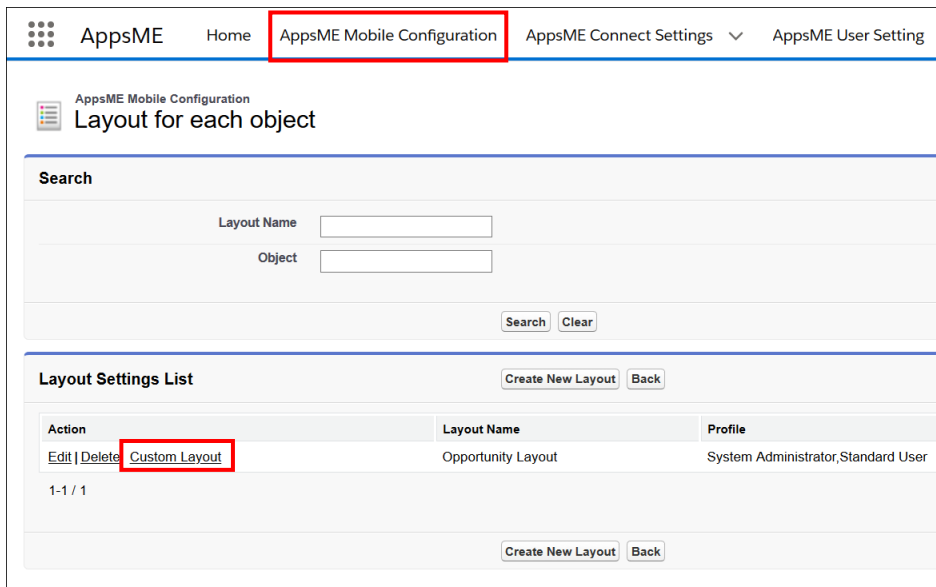
Set a custom layout for the object you want to view in a customized layout on AppsME.

4.1 Create Custom Layout

1. Log in to Salesforce and click “AppsME” in application launcher.

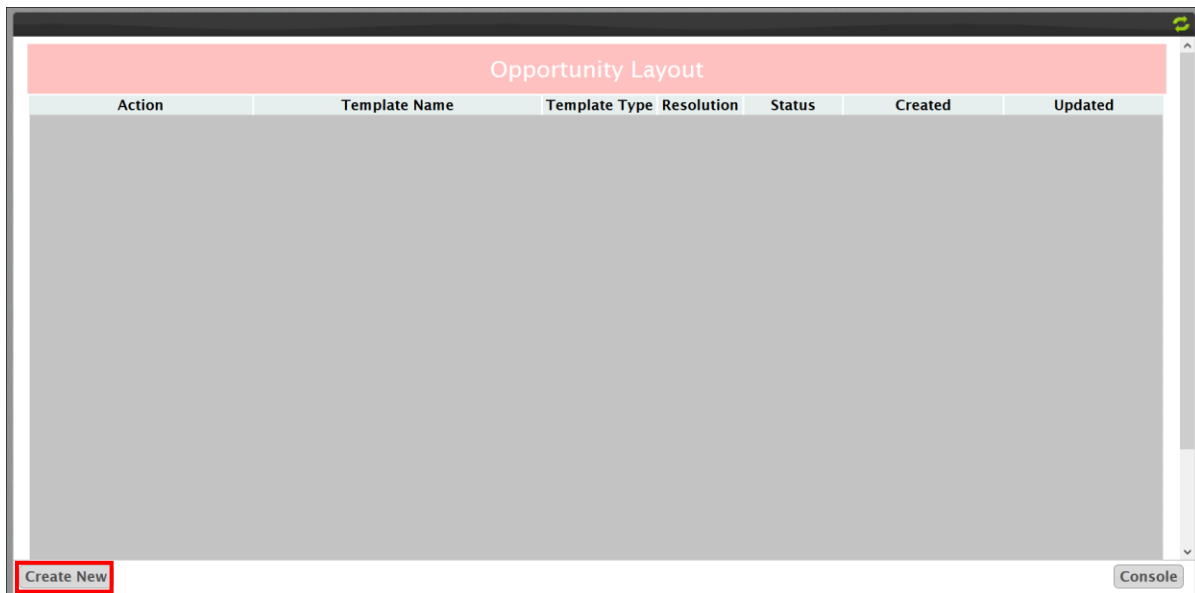


- Click [Layout for each object] in [AppsME Mobile Configuration] tab, then click [Custom Layout] displayed in the row of the object you want to set a custom layout.

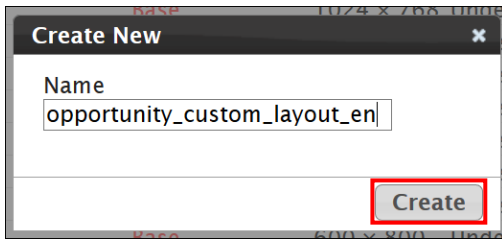


Note If there is no [Custom Layout] button, the current user is not registered for LAD record of OPROARTS. Please follow the steps in 3.2 Register "LAD" Record.

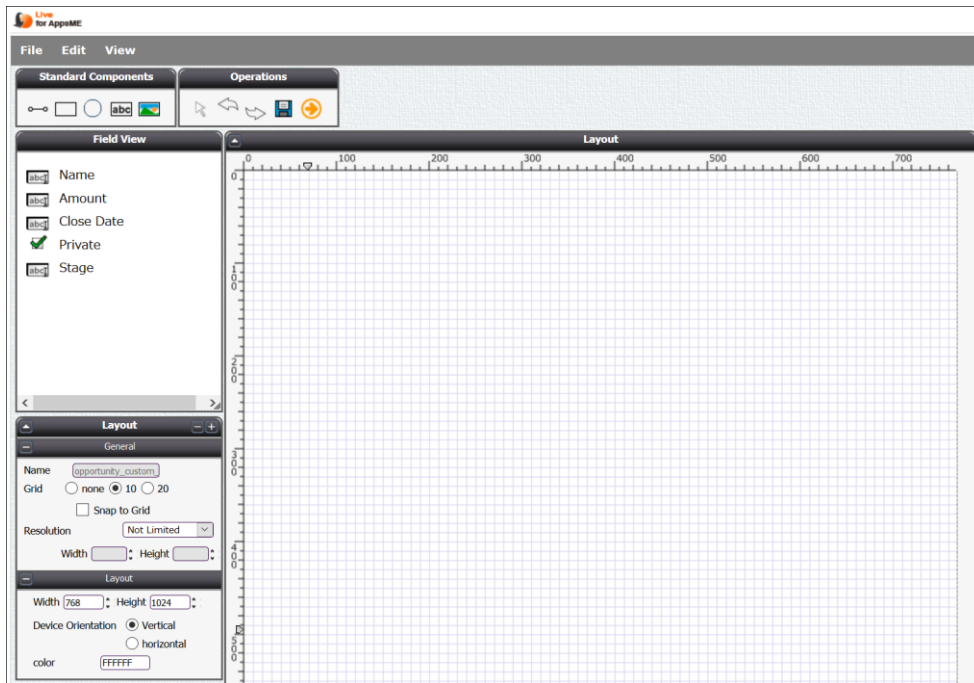
- Custom layout list screen opened. Click [Create New] button.



4. Enter a custom layout name and click [Create].

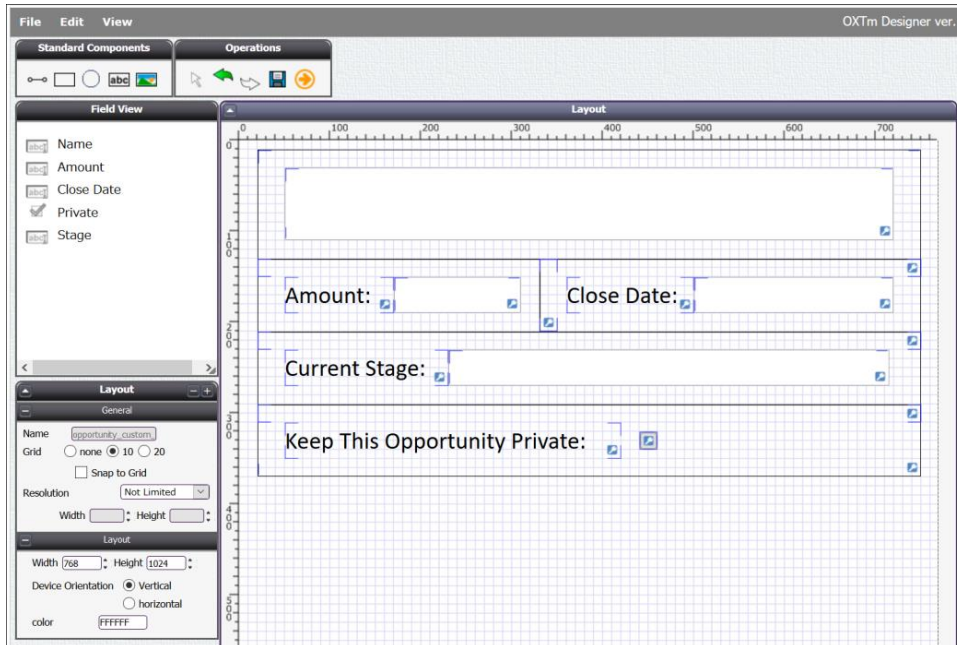


5. Designer screen for the custom layout opened. You design the custom layout in this screen.



4.2 Design Custom Layout

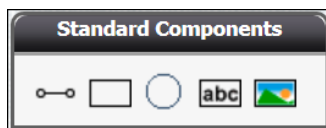
After opening the designer screen, you can design the layout on your mobile terminal. In this manual, we set the design below as a goal and create the custom layout.



4.2.1 Functions in Designer Screen

Here, we explain each function in designer screen to create layouts.

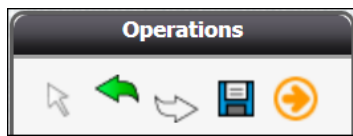
■ Standard Components



- ① ② ③ ④ ⑤

1. You can draw a line.
2. You can display a rectangle shape.
3. You can display a circle shape.
4. You can display static characters.
5. You can insert an image.

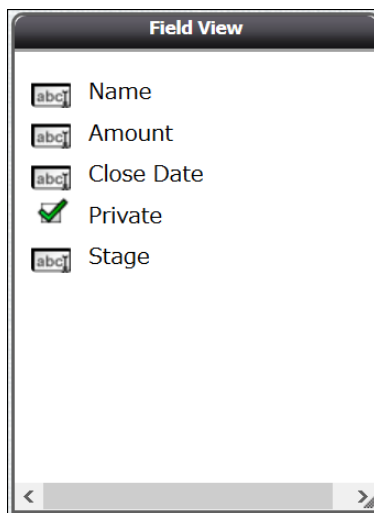
■ Operations



① ② ③ ④ ⑤

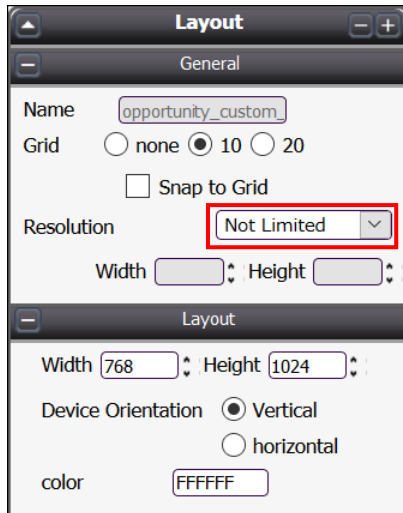
1. Switch to pointer.
2. Back to the previous state. (Undo)
3. Forward to the next state. (Redo)
4. Save the layout.
5. Deploy the layout to OPROARTS server.

■ Field View



The fields you chose in [Layout for each object] are displayed here.
By putting these fields on the layout, you can view/edit them on your mobile terminal screen.

Layout



These properties are for overall layout. This section is shown when no component is selected. Besides selecting the device to use in “Resolution”, you need to specify the actual layout size, which may not be the same as height and width of your mobile terminal screen, in “Layout”.

Point

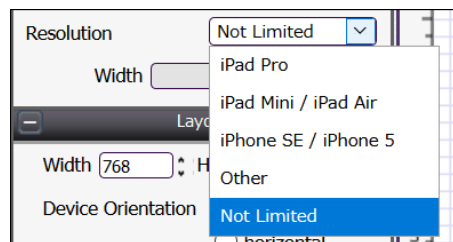
Resolution

In “Resolution”, you specify the logical resolution of the mobile device where you want to apply custom layout.

You can choose from “iPad Pro”, “iPad mini / iPad Air”, “iPhone SE / iPhone 5”, “Other” (you enter width and height manually), “Not Limited”.

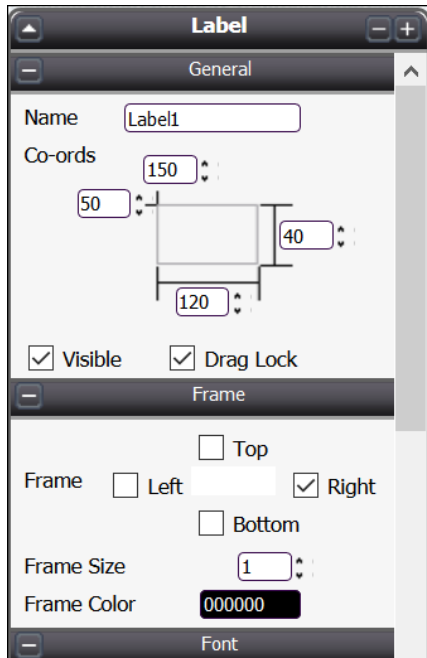
* Please note that the custom layout will not be reflected to your device’s screen if your mobile device’s logical resolution doesn’t match to the one you set.

Selecting “Not Limited” makes the custom layout adjustable to any devices. Please select this option unless you are sure of what device you use.



If the size you specified in “Layout” is larger than the device’s size, you cannot briefly view overall layout. You need to scroll the screen to view it.

■ Properties



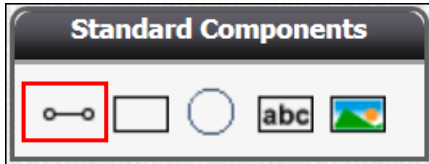
This section is shown when you select a component on the layout. You can configure the component's display with these properties.

The contents of these properties can be varied according to the kind of the selected component.

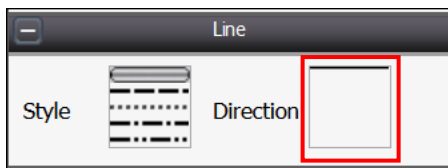
4.2.2 Practice

To make sure of how to operate, we explain the procedure to create the design introduced in the beginning of this chapter.

1. To begin with, draw ruled lines.
Select Line component (1 of 4.2.1) in Standard Components and click the point where you want to place the component in the design area.

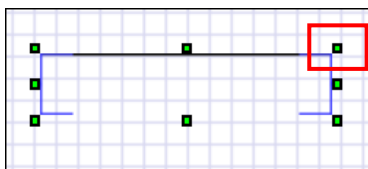


You can change the orientation of the line with "Direction" property.

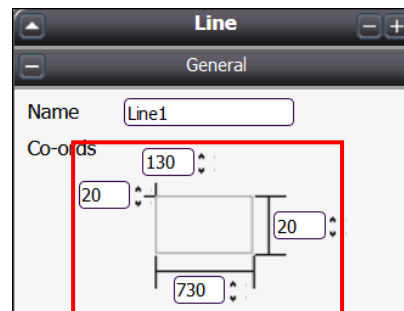


After you place a line, adjust the length of it.

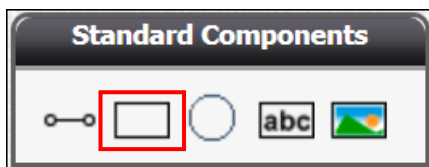
To do so, you can drag & drop each green mark on the component or specify "Co-ords" values in the property area on the left.



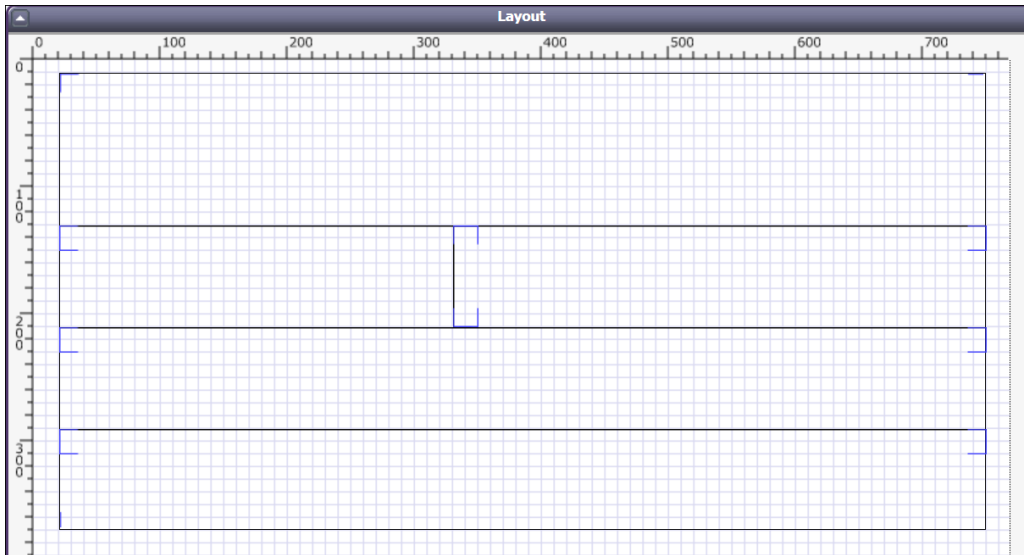
or



Rectangle component (2 of 4.2.1) is also available for ruled lines.

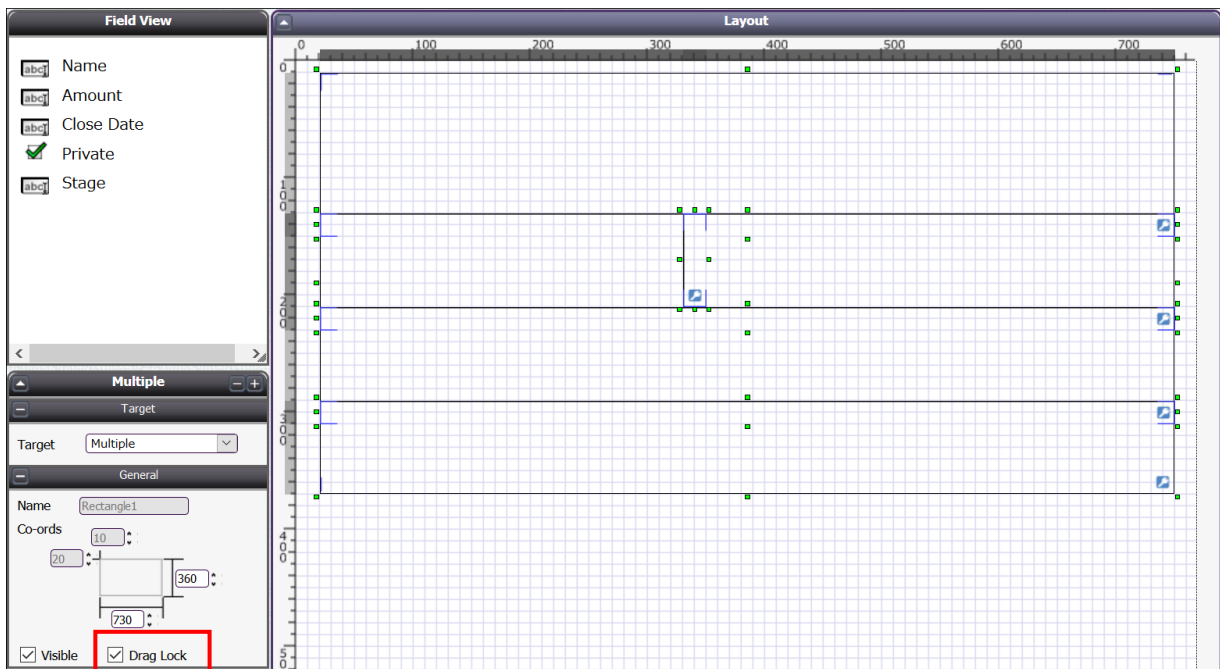


Repeat this step to design the layout like this image.

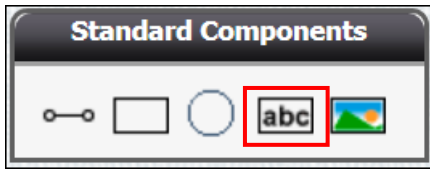


2. Check "Drag Lock" to prevent you from drag each component by accident.

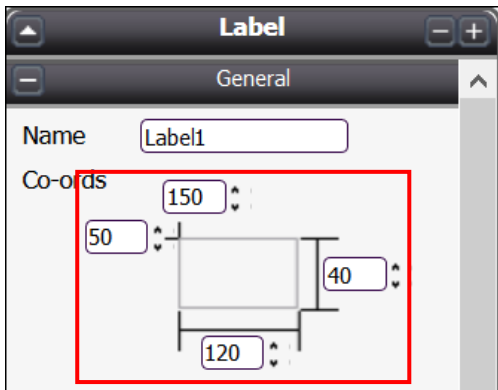
Point You can select multiple components by selecting components with Ctrl key pressed or performing rectangle selection with drag & drop. You can prevent multiple components from being dragged at once by checking "Drag Lock" while they all are selected.



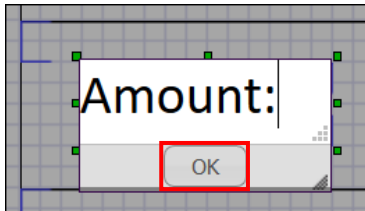
3. Next, place texts displayed statically (static fields). Select Label component (4 of 4.2.1) from Standard Components and click the point where you want to place the component in the design area.



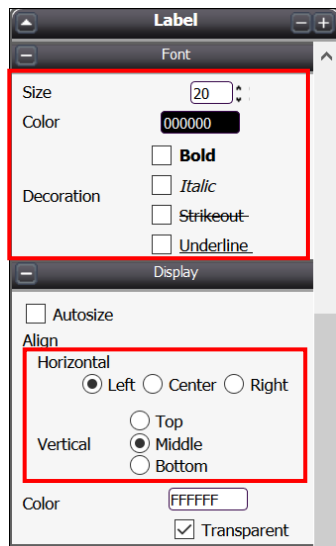
Specify the component's location and height/width as you did for ruled lines.



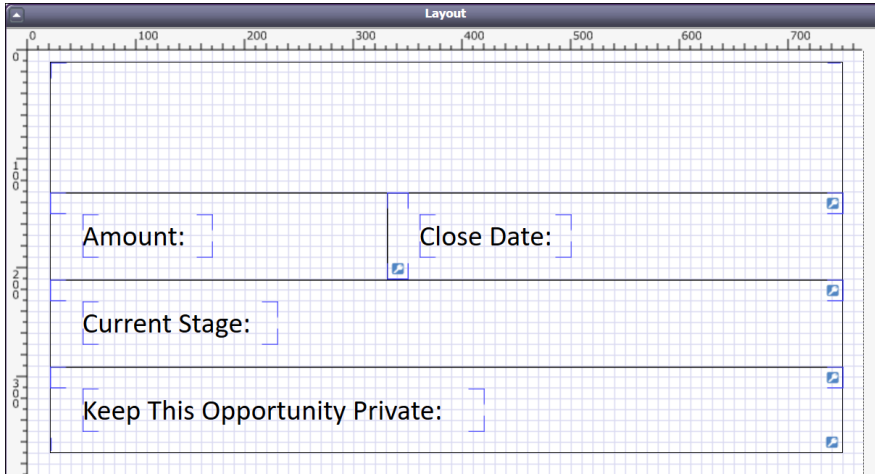
Double click the label you placed and a pop-up to enter a character string is displayed. Enter text you want to display and click [OK].



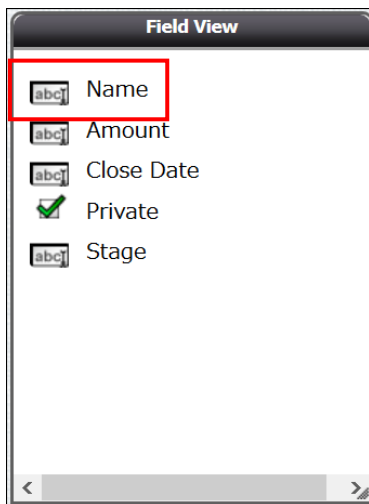
You can configure font/size of characters in "Font" and position of the character string in the label in "Display".



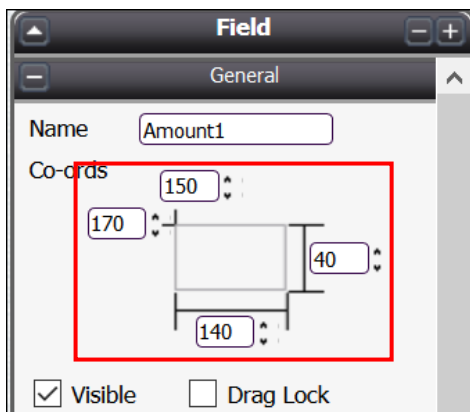
Repeat this step to design the layout like this image.



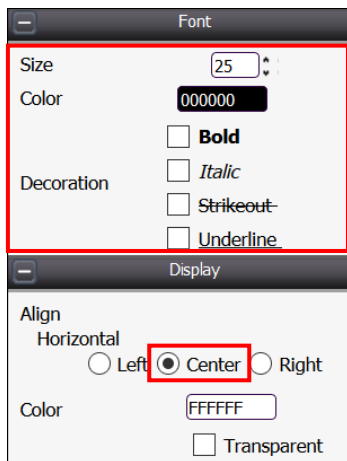
- Next, place labels (dynamic fields) for the fields of Opportunity object. Select label from field list on the left and click the point where you want to place the component in the design area.



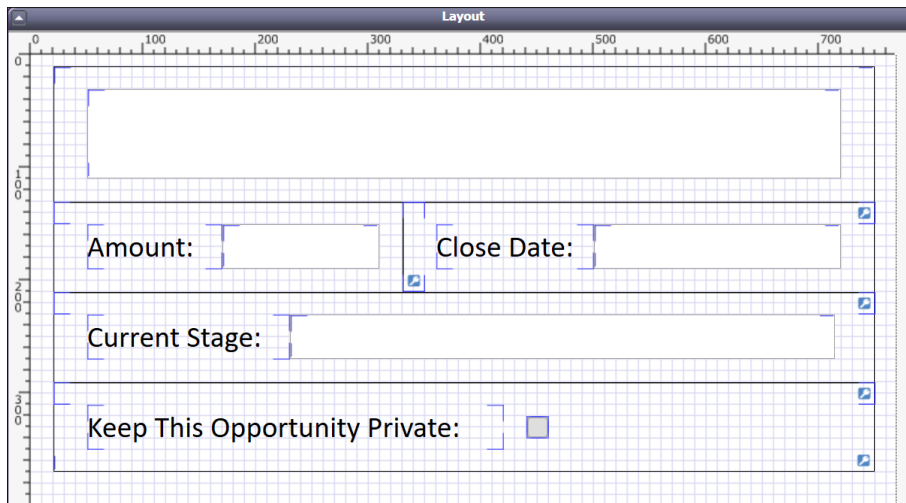
Specify the component's location and height/width as you did for static fields.



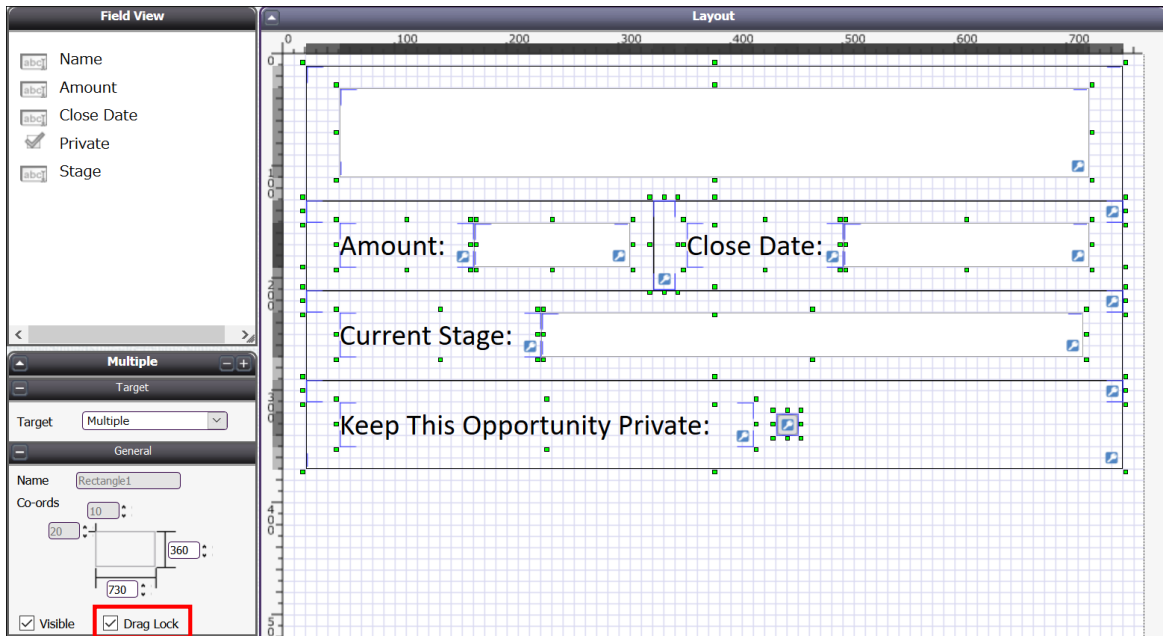
Configure font/size of characters in “Font” and position of the character string in the label in “Display”.



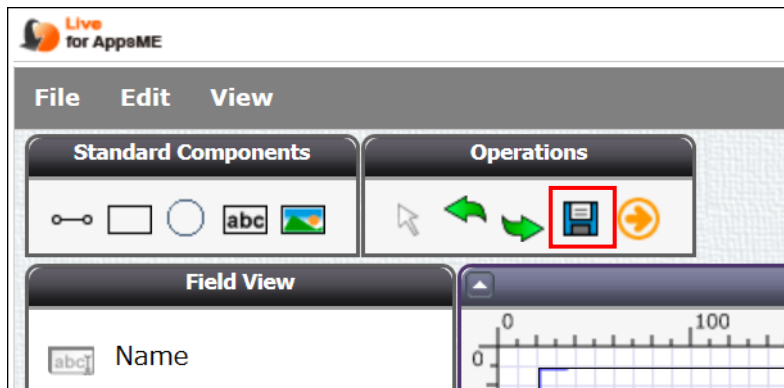
Repeat this step to design the layout like this image.



5. Prevent drag action on static/dynamic fields as you did for ruled lines.



6. After completing design, click save button.

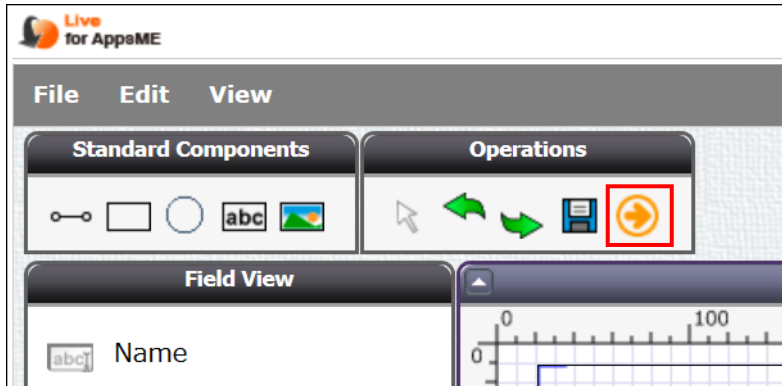


4.3 Deploy Custom Layout

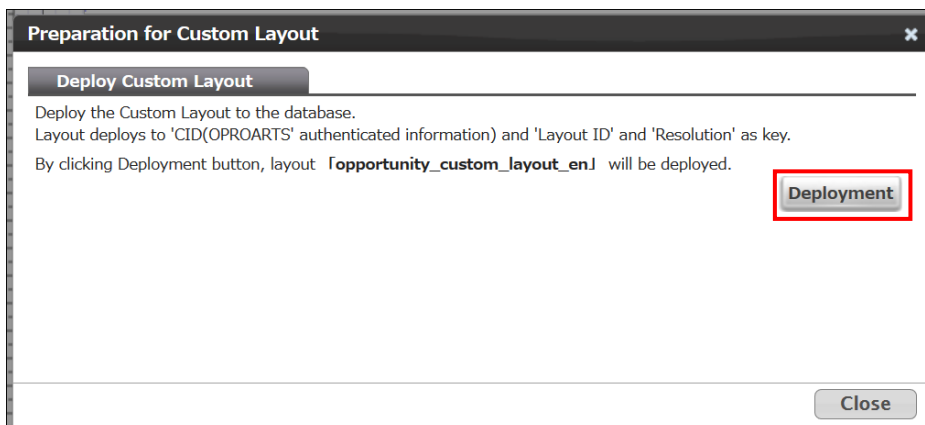
Custom layouts can be reflected to your mobile device's screen after you deploy them to OPROARTS server and synchronize the mobile device with that information.

First, deploy the custom layout you created.

1. Click an arrow button (deploy button) at the upper left.



2. A dialog box opens, so click [Deployment] button.



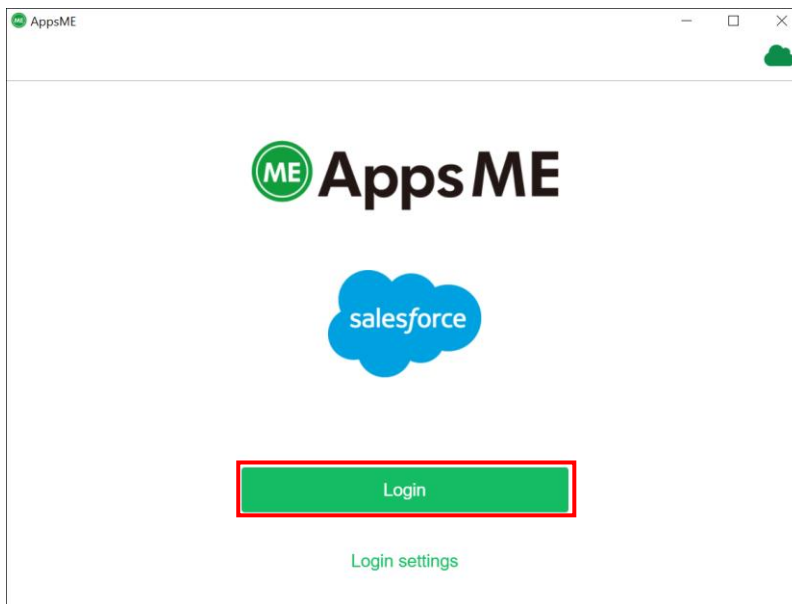
Your custom layout is deployed to OPROARTS server in the steps above.

5. Settings on Mobile Device

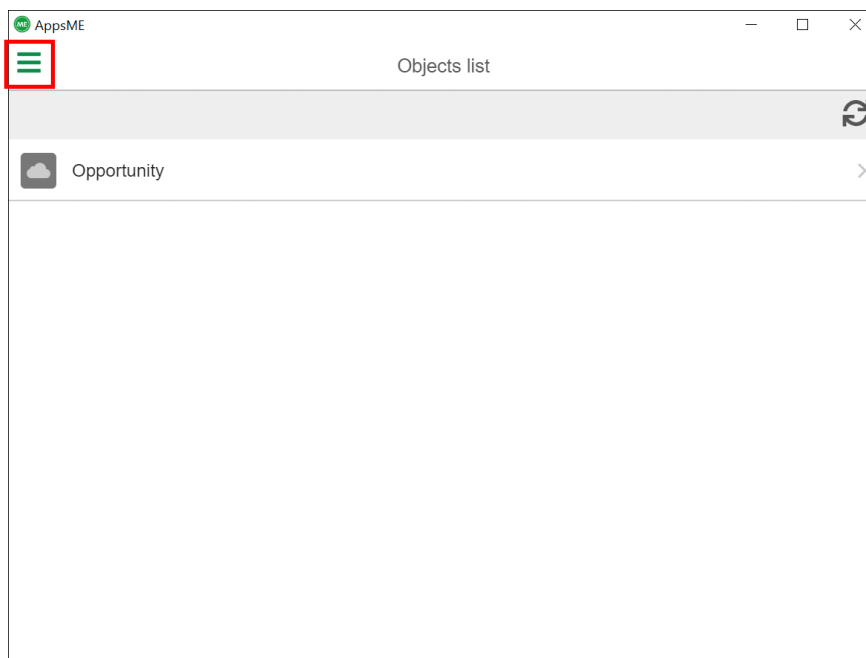
Perform settings to make views on AppsME look the same as the deployed custom layout.

5.1 Reflect Custom Layout

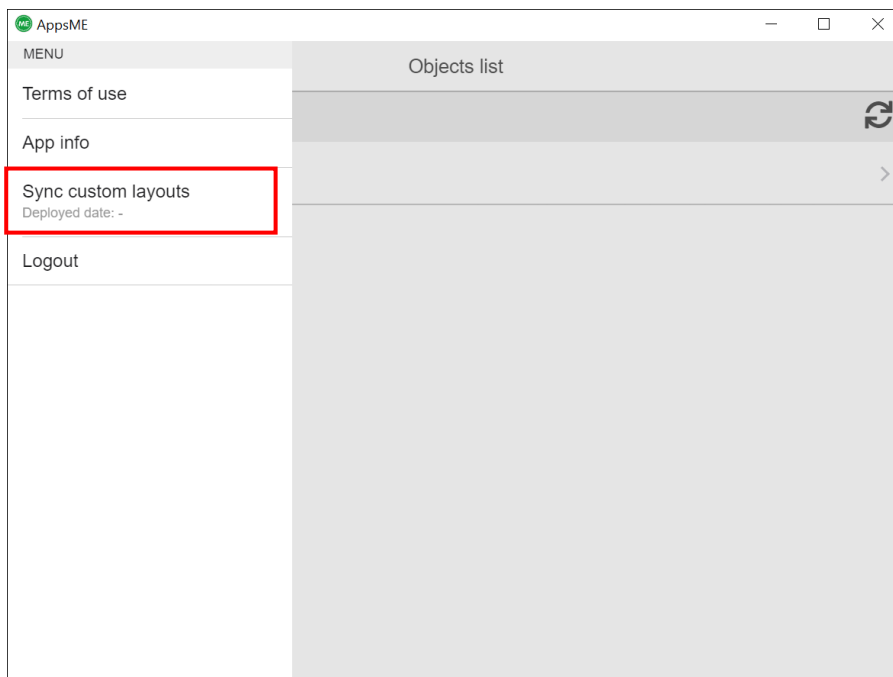
1. Launch AppsME on your mobile device and log in to Salesforce.



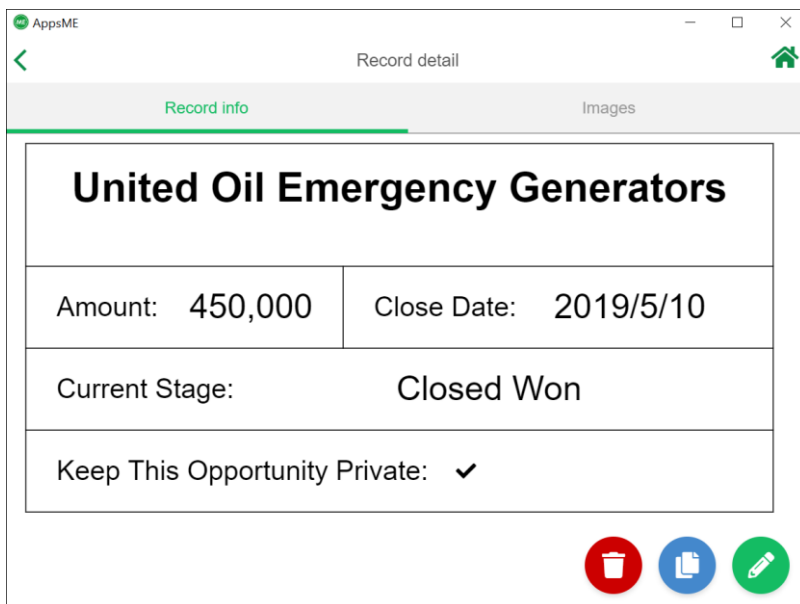
2. Tap a menu button at the upper left corner.



3. Click [Sync custom layouts], then Opportunity records will be displayed in the custom layout you created.



4. Actual view is like this image.



5.2 Undeploy Custom Layout

We explain the steps for you to undeploy custom layout and display record information in the default layout.

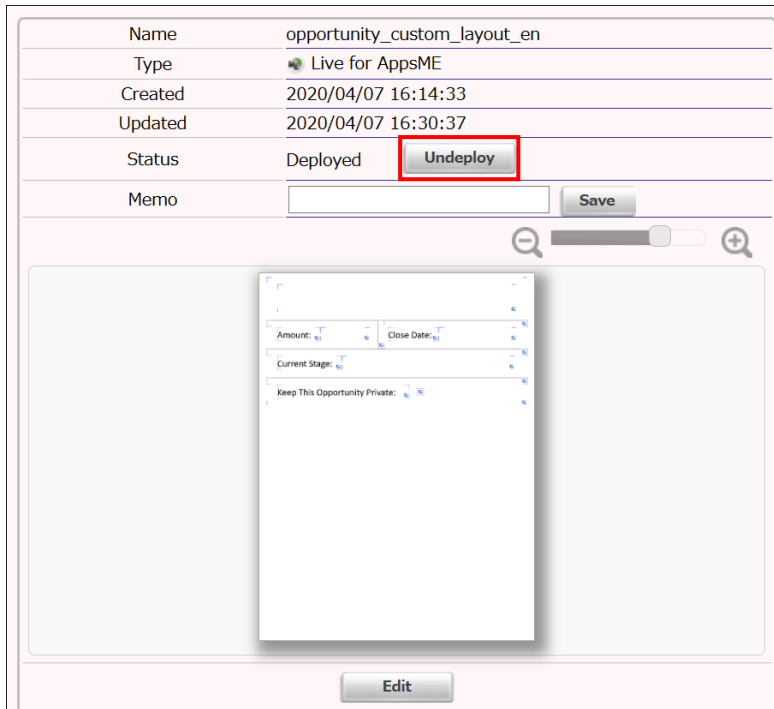
1. Click [START] button in [OPROARTS] tab in [OPROARTS Connector] app.

The screenshot shows the OPROARTS Connector application interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and tabs for 'Home' and 'OPROARTS'. The main content area is titled 'Authentication Information' and contains instructions for activating the application and registering authentication information. A 'START' button is highlighted with a red box, and a text box next to it says 'You can start the Designer in a new window!'. Below the text is a logo for 'OPROARTS Designer'.

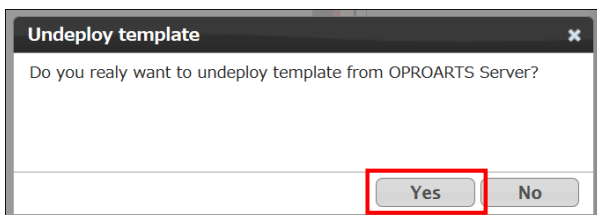
2. Select the custom layout you created in OPROART Designer.

Document Template						
<input type="checkbox"/>	Name	Status	Sharing	Created	Updated	
<input checked="" type="checkbox"/>	om_layout_en	Deployed	Published	2020/04/07 16:14:33	2020/04/07 16:30:37	

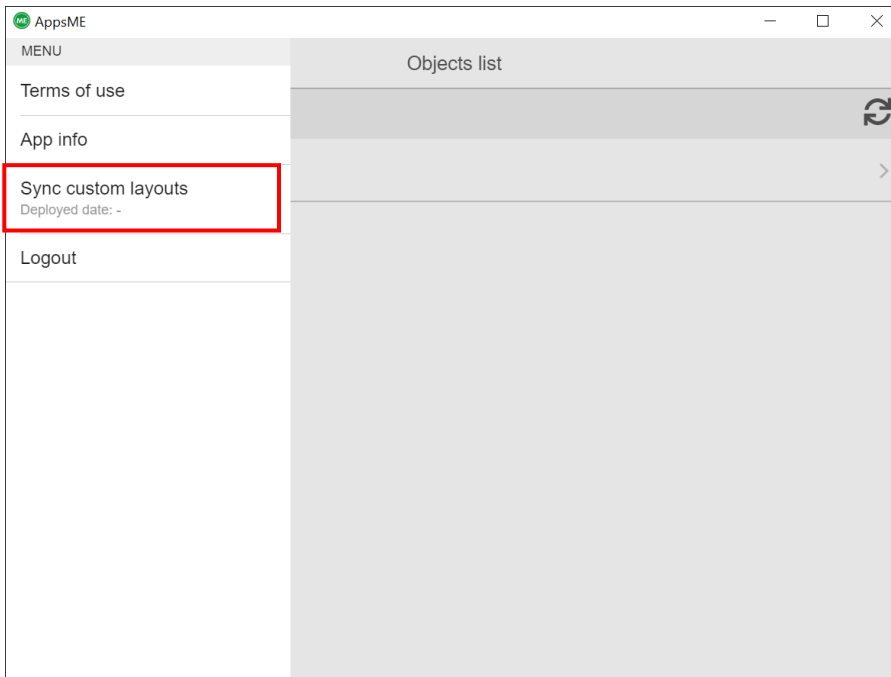
3. Click [Undeploy] button.



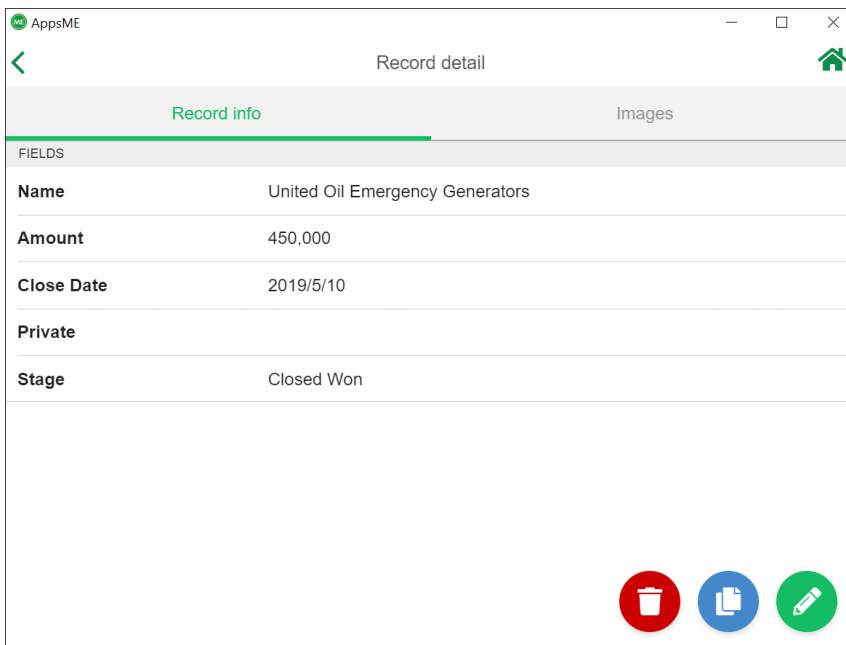
4. Click [Yes].



5. Click [Sync custom layouts] on your mobile device, then Opportunity records will be displayed in the default layout.



6. Actual view is like this image.





AppsME
Custom Layout Guide
Salesforce Ver.



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