

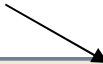
How to create the DreamTeam Projects Custom Tab




Step 1: Click on the Setup button on the top of the screen

Step 2: Click on Create located under App Setup on the left hand side of the screen

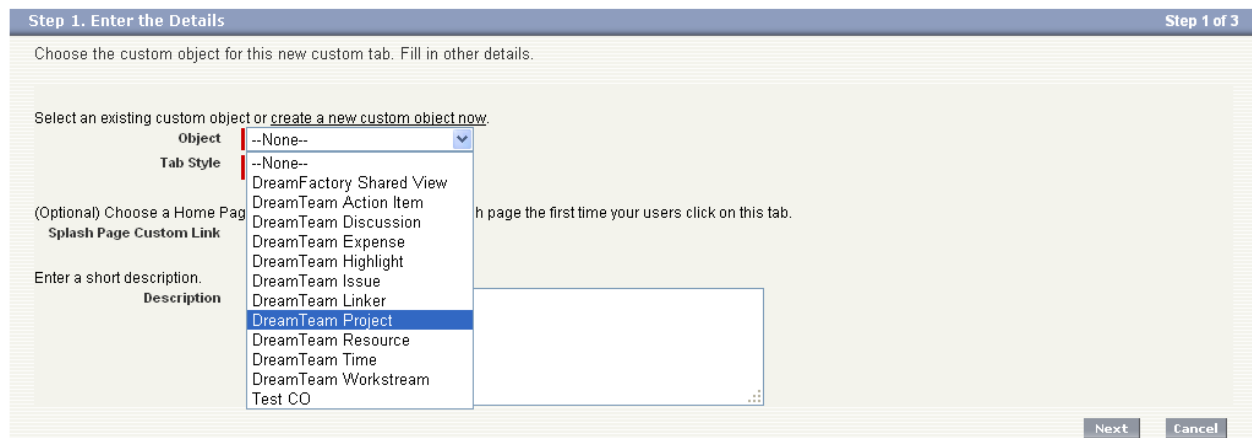
Step 3: Click on Tabs

Step 4: Click on the New button next to Custom Tabs



Custom Object Tabs			
Action	Label	Tab Style	Description
Edit Del	DreamTeam Projects	 Highway Sign	
Edit Del	DreamTeam Tasks	 Diamond	First
Edit Del	Proposals	 Chip	

Step 5: Select DreamTeam Project from the Object drop down menu



Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

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

Object: **--None--** (dropdown menu is open showing the following options: DreamFactory Shared View, DreamTeam Action Item, DreamTeam Discussion, DreamTeam Expense, DreamTeam Highlight, DreamTeam Issue, DreamTeam Linker, **DreamTeam Project**, DreamTeam Resource, DreamTeam Time, DreamTeam Workstream, Test CO)

Tab Style: **--None--**

(Optional) Choose a Home Page: (placeholder: h page the first time your users click on this tab.)

Splash Page Custom Link:

Enter a short description.
Description:

[Next](#) [Cancel](#)

Step 6: Select a Tab Style from the list. To do this click on the Icon next to tab Style.



Step 7: Click the next button

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

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

Object:

Tab Style:

(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:

Step 8: Next select the profiles you want to see this custom tab

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
Contract Manager	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Marketing User	Default On
Read Only	Default On
Solution Manager	Default On
Standard User	Default On
System Administrator	Default On
Test Bug Man	Default On
Test Sys Admin	Default On

Previous

Next

Cancel

Step 9: Select which platform you want the tab to appear on then click the 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"/>
DreamTeam	<input checked="" type="checkbox"/>
Marketing	<input checked="" type="checkbox"/>
Ideas	<input checked="" type="checkbox"/>

☒ Append tab to users' existing personal customizations

Previous

Save

Cancel

Step 10: Once you have created the DreamTeam Projects Tab then you will be able to see your project data from the Salesforce view. Note: Do not make changes to your project from this view otherwise it will cause problems.