Implementing an App Homepage as the Default Landing Page for Users

Prepared by Ritesh Bisht 30 March 2024

Overview

Great user experience is crucial for Salesforce adoption. One key strategy for improving user satisfaction is creating a customised and easy-to-use home page on every Application you create. When users land on a specific home page designed for them or their team, it increases confidence and makes important information accessible.
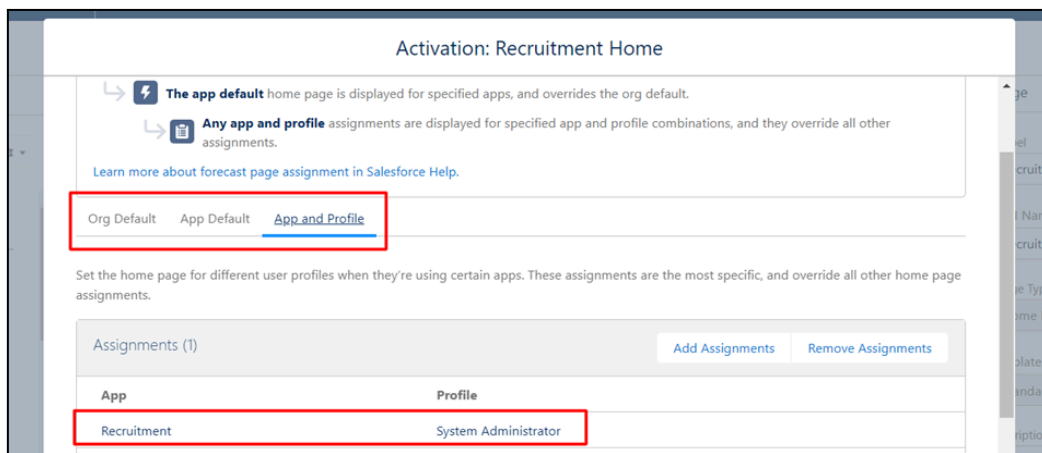
We recommend creating unique Apps and Home Pages for different teams. This approach prevents users from feeling lost when they log into Salesforce. It also allows users to quickly access the tools they need, boosting productivity and satisfaction.

We've created this guide to help you set a particular App to a particular user so that they see that same Home Page every time they log into Salesforce.
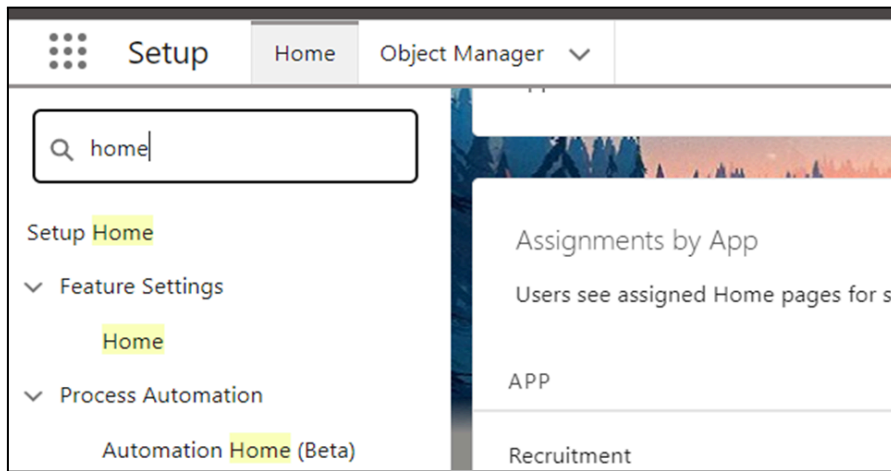
Set Up

Validate App Assignment

1. Begin by verifying that the application has been appropriately assigned within your organisation. For illustration purposes, let's consider a sample application, the Recruitment App.

2. Navigate to the Home page on the Recruitment App and access the setup gear icon in the top right hand corner. Choose the "Edit Page" option at the bottom of the list.

3. Within the setup page, ensure the assignment is set to either Org Default, App Default, or a specific App and Profile combination. For demonstration, let's assume it's assigned to a System Admin profile.
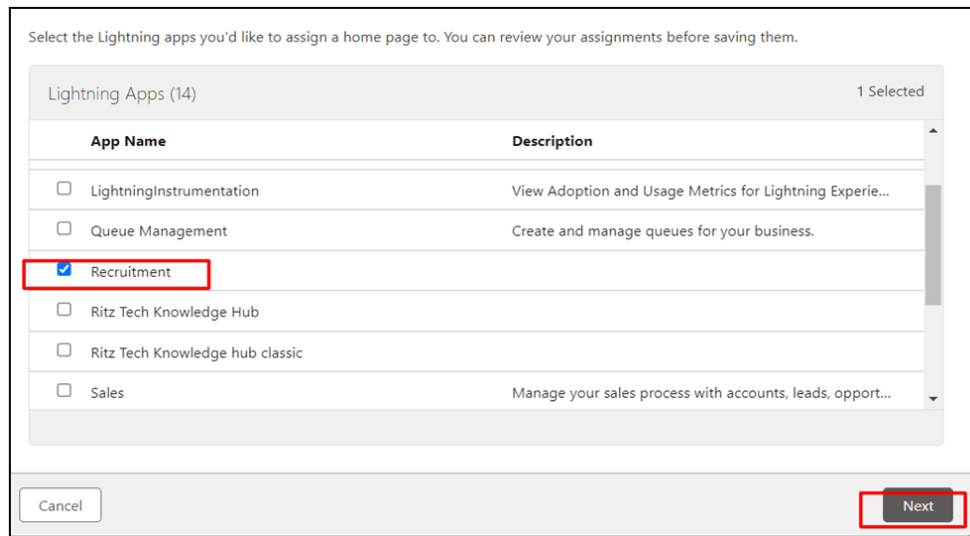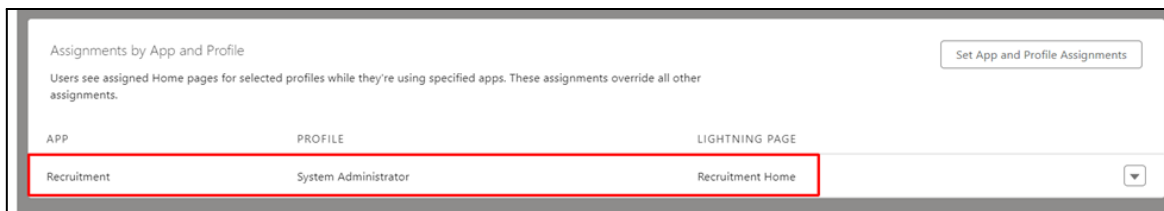

Navigation to Home Page Settings

4. Access the Setup Page via the gear icon located in the top right-hand corner.

5. Utilise the quick find search bar and input "Home" to locate the relevant settings. Verify that the assignment made for the application by profile is reflected here. If not, proceed to implement it following a similar approach.
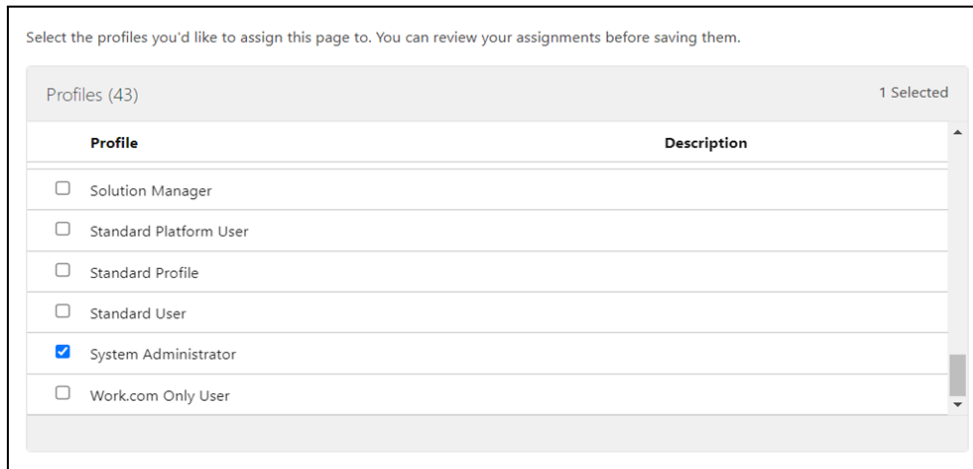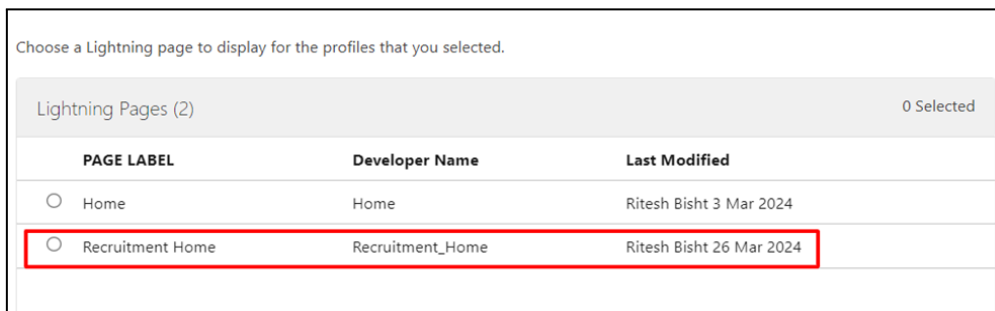
App and Profile Assignments:

6. Initiate the assignment process by selecting "Set App and Profile Assignments," then choose the desired application and proceed to the next step.

7. Select all relevant profiles for which the application is to serve as the default landing page upon logging in, and proceed by clicking "Next."

Select the profiles you'd like to assign this page to. You can review your assignments before saving them.

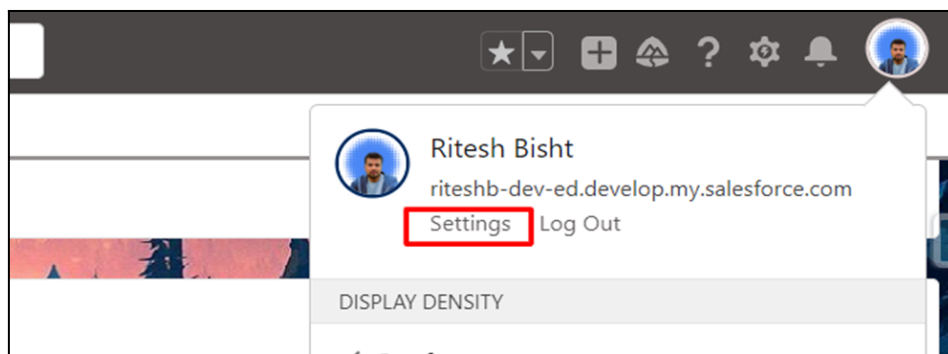| Profile	Description
☐ Solution Manager	
☐ Standard Platform User	
☐ Standard Profile	
☐ Standard User	
☑ System Administrator	
☐ Work.com Only User	

Profiles (43) — 1 Selected

8. Choose a Lightning page from the available options, designating it as the default page for your application. Proceed by clicking "Next" and "Assign" to finalise the selection.

Choose a Lightning page to display for the profiles that you selected.

Lightning Pages (2) — 0 Selected

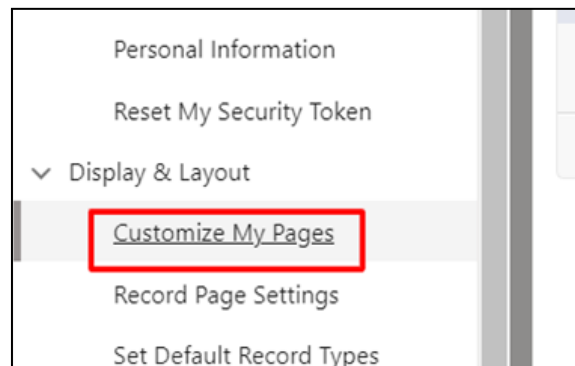| PAGE LABEL	Developer Name	Last Modified
○ Home	Home	Ritesh Bisht 3 Mar 2024
○ Recruitment Home	Recruitment_Home	Ritesh Bisht 26 Mar 2024

Check customise My Pages in your Personal Setting

Log in as one of your users and check that the settings you just updated are working as expected. If they are not, it might mean that the personal settings for this user are overriding the changes you just made. To check this…
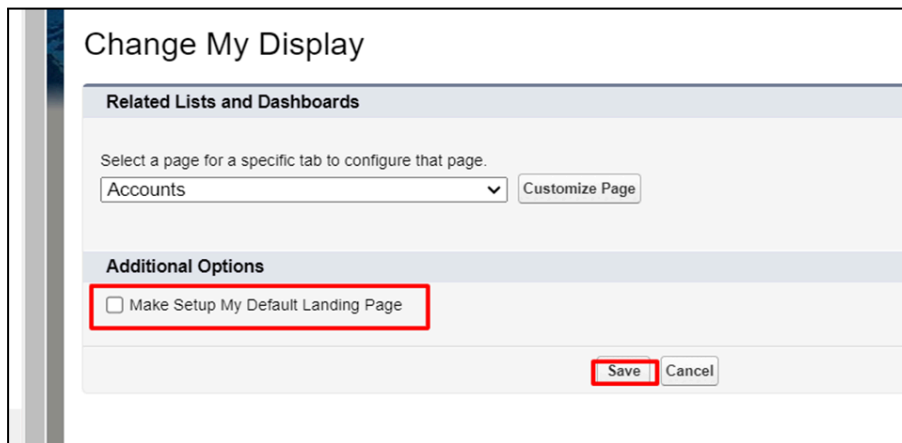
9. Navigate to your Avatar located in the top right-hand corner and select "Settings."

Ritesh Bisht
riteshb-dev-ed.develop.my.salesforce.com
Settings   Log Out

DISPLAY DENSITY

10. Scroll down below the quick find section and choose "Customize My Pages" under the Display and Layout segment.

11. Uncheck the "Make Step-up My Default Landing Page" option and save the changes. (Note: This option may be checked by default for the System Admin profile.)

Confirmation of Settings

Log out from your current profile and log in again to confirm the implementation. Upon login, you should be directed to the selected Lightning page of your Application as the default landing page.

You should check what your user sees by logging in as them also.