



Vertical Menu Bar

User Guide

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Introduction

The Vertical Menu bar application will help you with a seamless and highly configurable custom menu bar that will enable building community using the vertical main menu bar. It allows you to configure menu items and also customize the color scheme etc.

Application Overview

The Vertical menu bar is developed to help Community Builders design their communities using the vertical menu bar seamlessly as the themes provided by Salesforce do not support the alignment of main menu items vertically.

The shining features of the Vertical Menu Bar:

1. Configuring menu items
 - *Create your main menu and submenus by just configuring Custom Metadata*
 - *Use your icons or icons provided by Salesforce*
 - *Easily manage menu items for multiple communities by grouping them per community*
2. Builder Properties for theme settings
 - *Configure background, font and text hover colors to match your organization's brand guidelines*
 - *Option to sort the menu items alphabetically for specific use cases*
3. Easily control visibility using Salesforce profiles
 - *Include & exclude profiles to control each menu item's visibility separately*
 - *Or make it visible to all profiles having access to the community*
4. Map pages with menu items
 - *Map standard and custom community pages with menu items*

Getting Started

User Access / Permissions

One should grant access to the Specific Vertical Menu Bar's **Custom Metadata Types** and **Apex class** to the user profiles (also include guest user profile, if required) with the help of the following path.

1. Give access to the **Apex class**:

- Setup > Profiles > Choose a profile to give access > Apps > Apex Class Access > Edit > Select listed Apex classes > Add > Save.

- *xGsVerticalTreeController*
- *xGsVerticalTreeControllerTest*
- *xGsVerticalTreeDynamicPicklist*
- *xGsVerticalTreeDynamicPicklistTest*
- *xGsVerticalTreeWrapper*

2. Give access to the **Custom Metadata Types**:

- Setup > Profiles > Choose a profile to give access > Apps > Custom Metadata Types> Edit > Select Listed Custom Metadata Types > Add > Save.

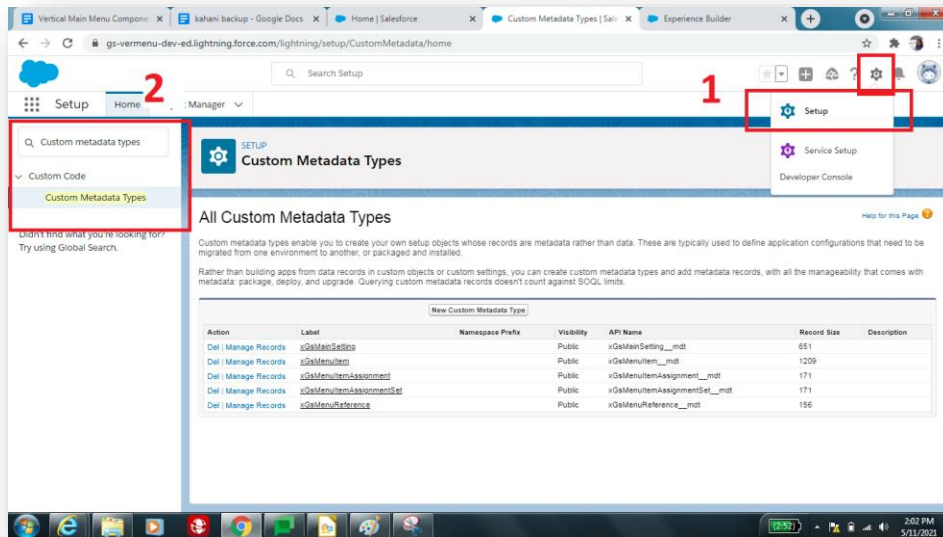
- *xGsMainSetting*
- *xGsMenuItem*
- *xGsMenuItemAssignment*
- *xGsMenuItemAssignmentSet*
- *xGsMenuReference*

Once these steps are complete actual setup will take place as below. Mainly setup is divided into two main parts. Let's start with setup part one.

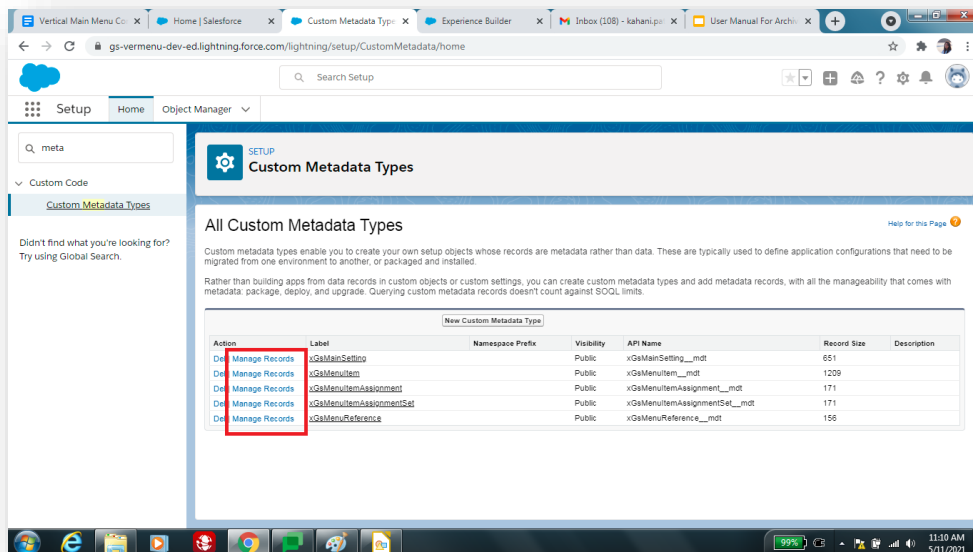
Creating Custom Metadata Types Records

Follow the steps to set up the Custom Metadata types for the vertical menu bar:

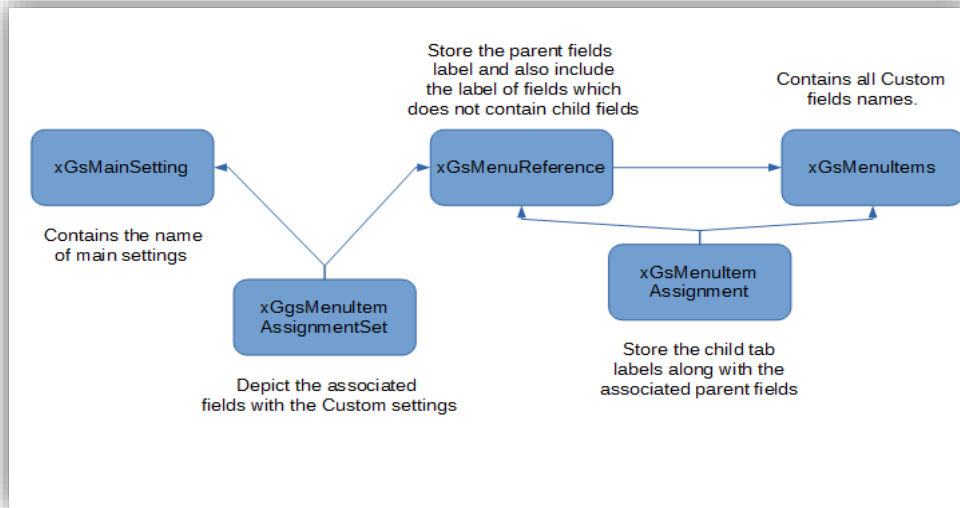
1. Log in to the Salesforce org using valid credentials.
2. Click on the gear icon on the top right corner of the home page and select **Setup** (1). And, Search **Custom Metadata Types** in the Quick Find box in the top left corner (2).



3. Now, click on **Manage Records** in Custom Metadata Types to alter the custom metadata type for the Vertical Menu Bar as per the organization's need.



4. The vertical menu bar gets the dynamic data from the Custom metadata types set up by the organization Admin. The structure of custom metadata types is explained in the diagram below.



Precisely,

1. **xGsMenuItems:** The xGsMenuItems custom metadata type contains all the custom field names which will be set by the users, such as;
 - **Label:** Label the tab,
 - **Active:** it indicates if the field is active or not.
 - **Active:** This will only display fields that are active at a time.
 - **Expanded:** It will show the child labels in an expanded manner if it is checked.
 - **Tab sequence number:** it will show the tabs as per the specified sequence.
 - **Icon Type:** It will show options for icons (ex. Standard Icon or Custom Icon From Static Resource like JPEG, PNG, etc, or Custom CSS Icon Class).
 - **Icon Source:** Users can give the name of the icon in this field.
 - **Page type:** It will show the page type.
 - **Page reference API name:** If the page type is selected as standard or custom page then the user needs to give the page API name and If the page type is selected as object page then give the object API name
 - **Include Profile:** Users can allow access to the desired fields by specifying the allowed profile name in a comma separated from this field.
 - **Exclude profile:** Users can exclude access to the desired fields by specifying the restricted profile names in a comma-separated form in this field.
2. **xGsMenuItemAssignment:** This Custom metadata type will store the child tab labels along with the associated parent fields.
3. **xGsMenuReference:** This Custom Metadata Types will store the parent fields label and also include the label of fields that do not contain child fields.

4. **xGsMenuItemAssignmentSet:** This Custom Metadata Type will depict the associated fields with the Custom settings and will display them when the associated setting is selected from the **Setting Name** theme settings on the Community page.
5. **xGsMainSetting:** This Custom Metadata Type contains the name of the main settings which are displayed in the **Setting name** picklist on the Community page.
 - **Icon Type:** It will show options for icons (ex. Standard Icon or Custom Icon From Static Resource like JPEG, PNG, etc, or Custom CSS Icon Class).
 - **Default Icon Source For Parent Tab:** Users can give a default icon source for the parent tab.
 - **Default Icon Source For Child Tab:** Users can give a default icon source for the child tab.
 - **External CSS Library Path For Icons:** Users can give the path of a CSS file that is uploaded in a static resource library if the user uses the CSS icon class in tabs. –
 - E.g. : staticResourceName/folderName/fileName.css
 - **Guest User Profile Name:** Guest User Profile Name for the current portal.
 - All Sites > Builder > Settings > General > Guest User Profile)

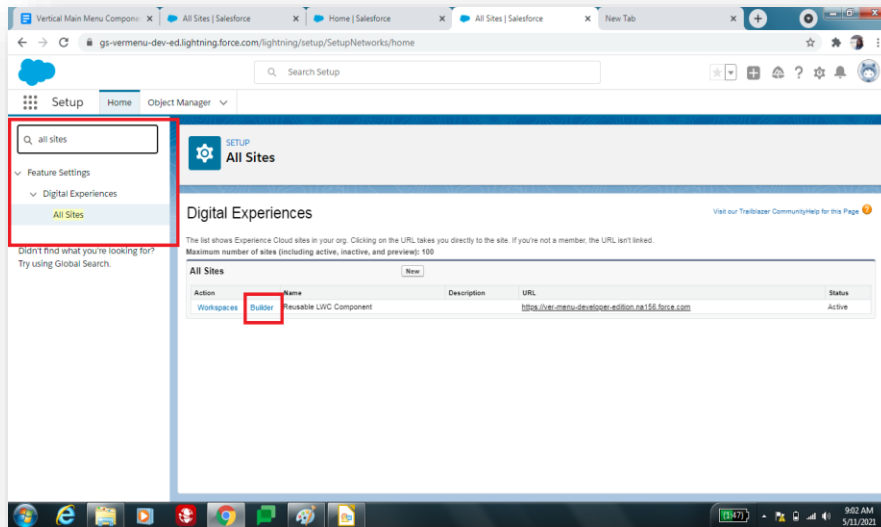
Now after completing the above steps, it will come to part two setting up the community site.

Theme Layout for our community

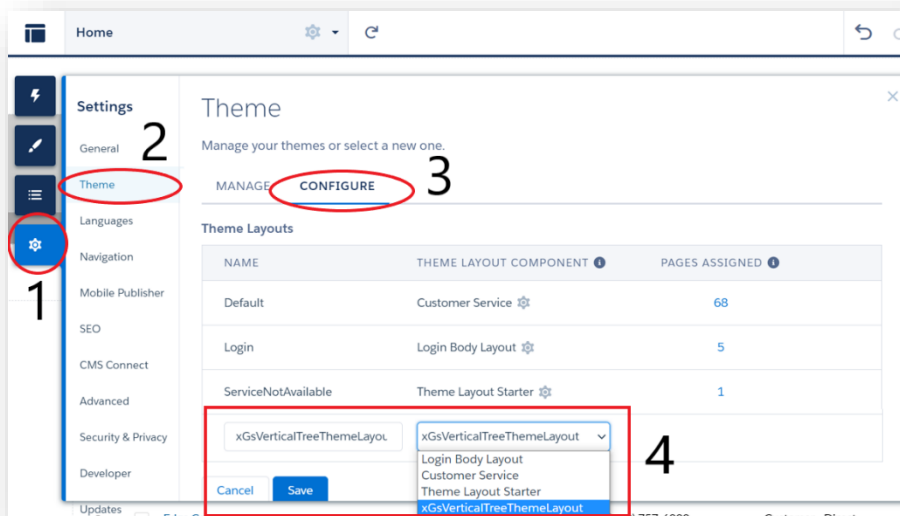
The Vertical menu bar is a custom component that uses a custom community theme layout. To achieve the look and feel of a Vertical Menu Bar on any community page, users need to override the theme and switch to the custom

Follow the steps to override the theme for Vertical Menu Bar.

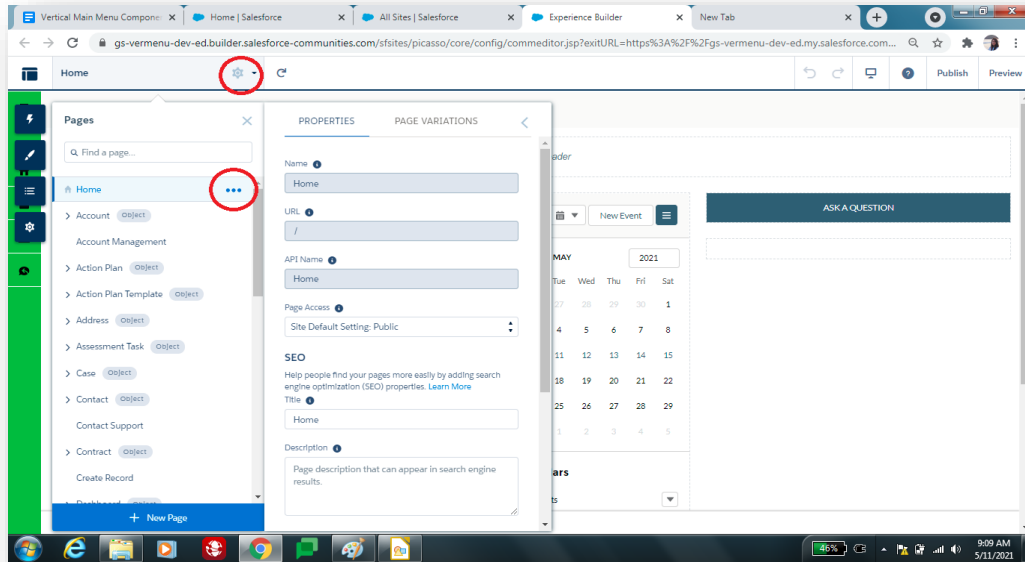
1. First, search All Sites from the Quick Find Box in the setup and click on Builder situated on the left side of the Reusable LWC Component.



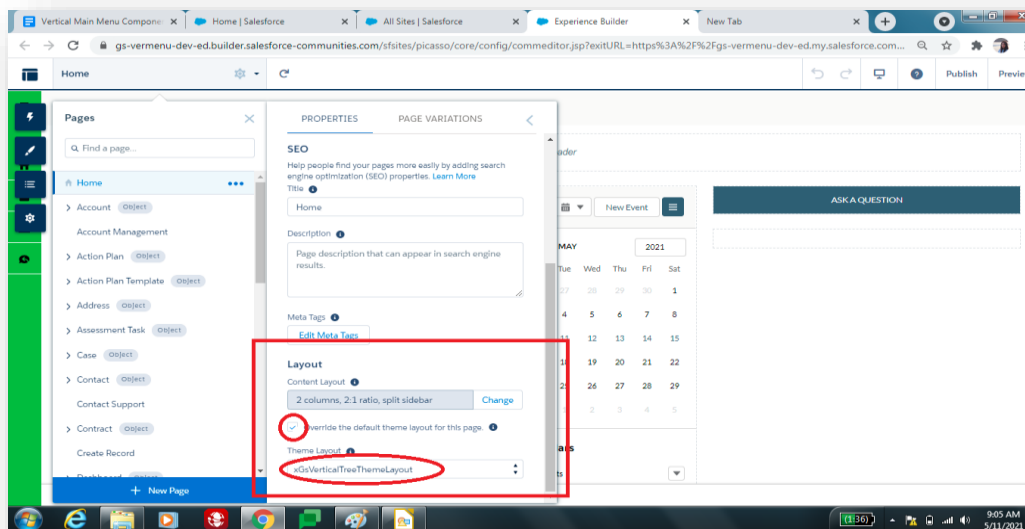
2. From the setting, add xGsVerticalTreeThemeLayout as a Theme Layout for our community.

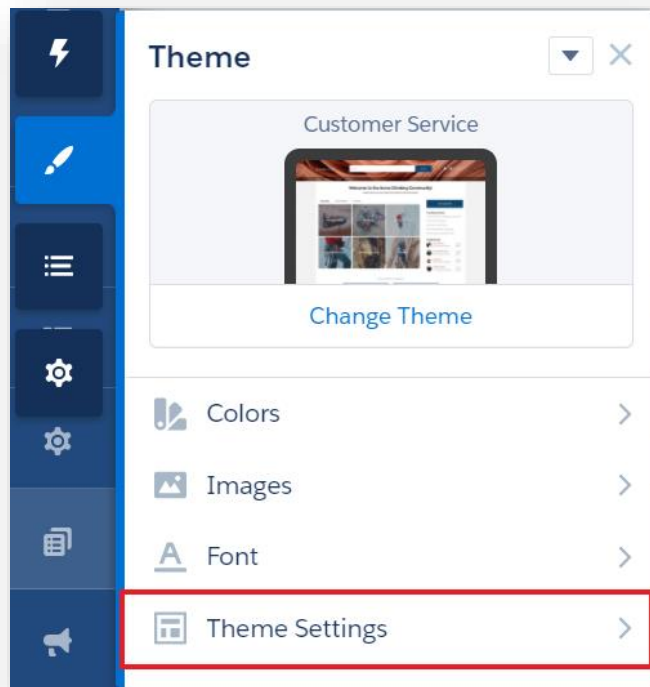


- Now, select the setting icon in the right corner of any page and click on the three-dotted icon as shown in the picture where you want to see the Vertical Menu Bar.



- From the properties, in the Layout section, check the box as shown below and select the xGsVerticalThemelayout option from the picklist to override the custom theme layout to achieve the look and feel of the Vertical Menu bar on any page of your preference.



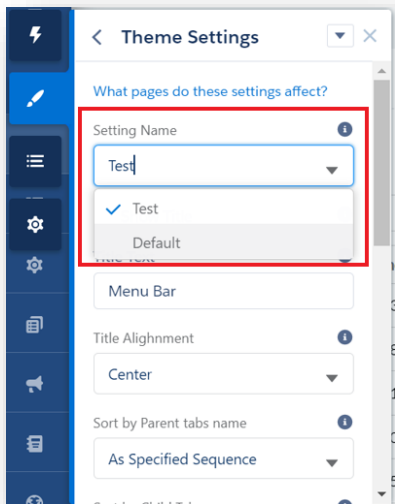


After completing the setup organization admin can configure the look & feel of the vertical menu bar as mentioned below section.

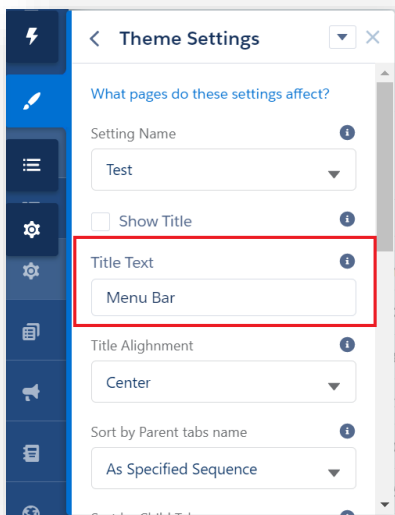
Configure - Look & Feel

To configure the look and feel of the menu bar, follow the following steps: Go to **Theme settings** by clicking the Theme icon.

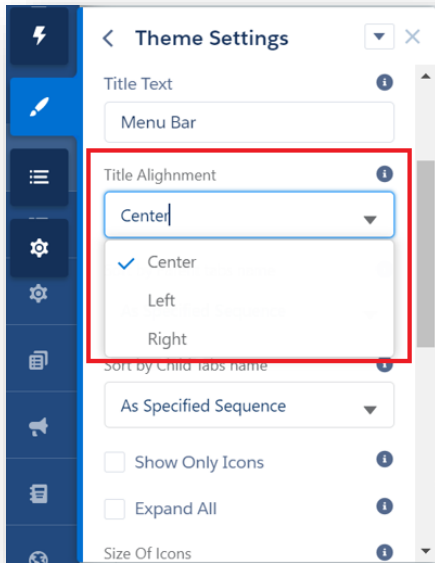
1. Users can select all the active tabs associated with the given setting name from the **SettingName** pick list as shown below.



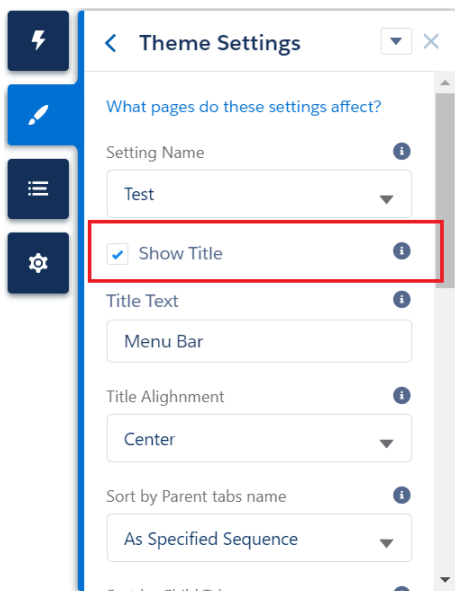
2. Users can also give the title to the vertical menu as per their preference by entering the title in the **Title text**.



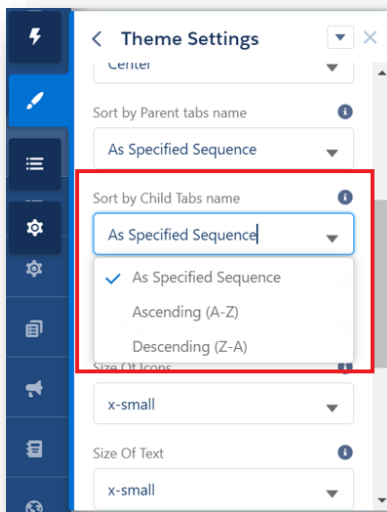
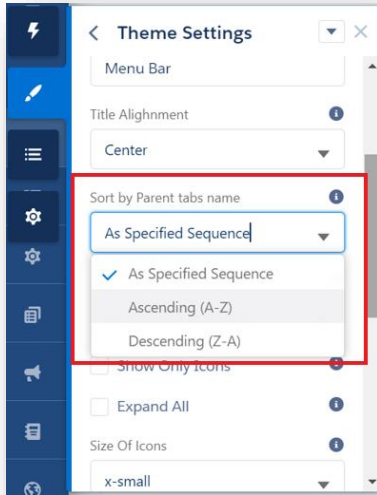
Moreover, users can change the title alignment by selecting the left, right, or center options from the Title Alignment picklist.



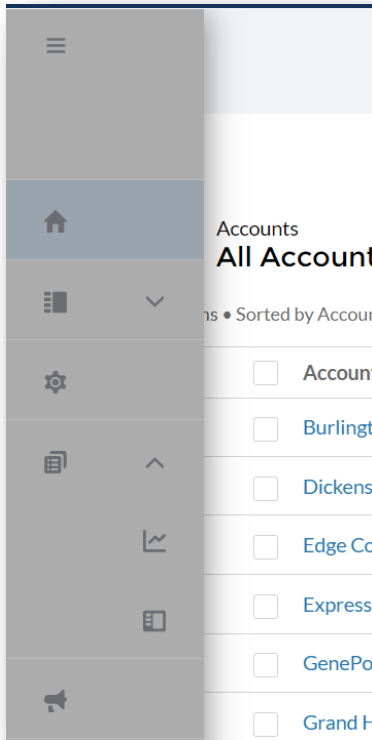
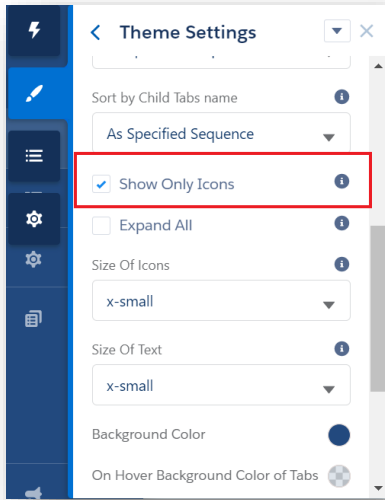
Also, users can decide to show or not to **Show the Title** by checking or unchecking the Show Title checkbox as shown.



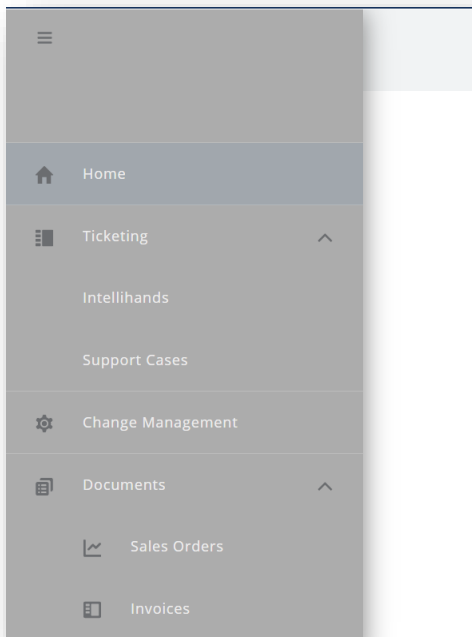
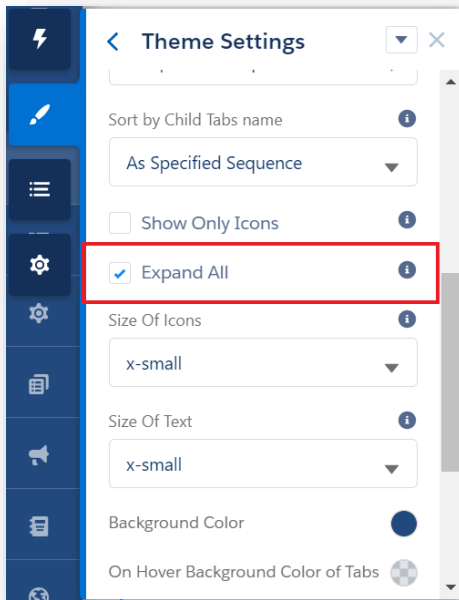
3. Users can sort the parent or child tab items of the menu bar as per their preference by selecting the Ascending, Descending, or as per specified sequence option from the **sort by parents tab name** or **sort by child tab name** respectively.



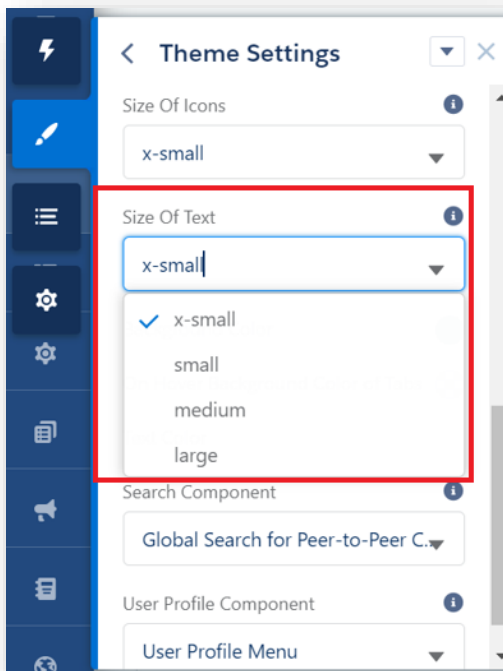
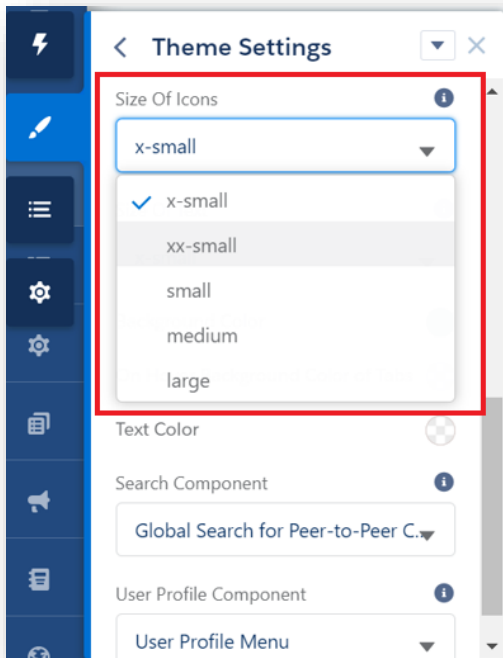
4. Users can select the **show-only icons** to display only icons. Thus, it will only display icons and will hide the labels of the menu bar items as shown below.



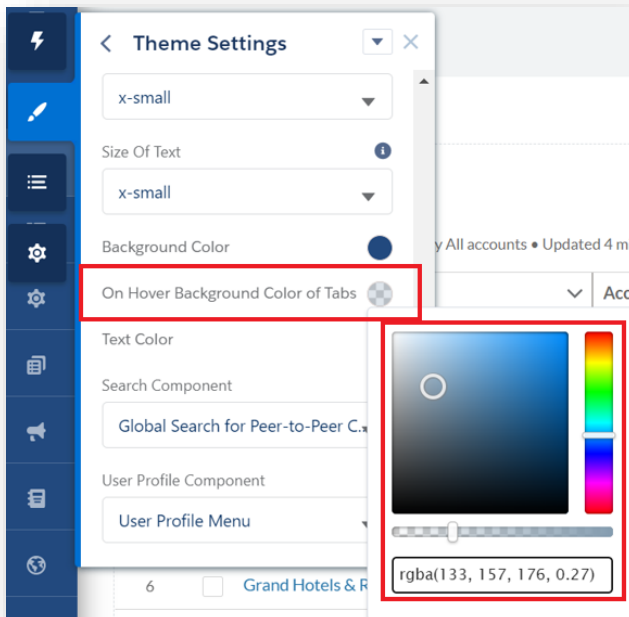
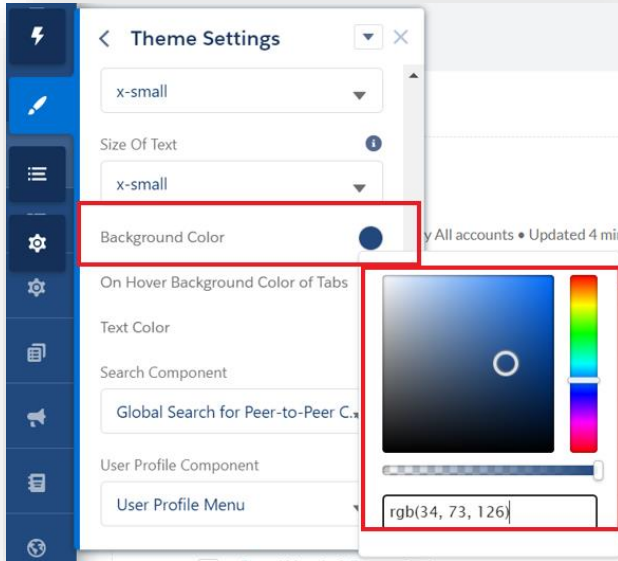
5. Users can select the **Expand all** option to expand all the child tabs in the vertical menu bar. Thus, it will show all the child tabs in an expanded manner as shown in the picture below.

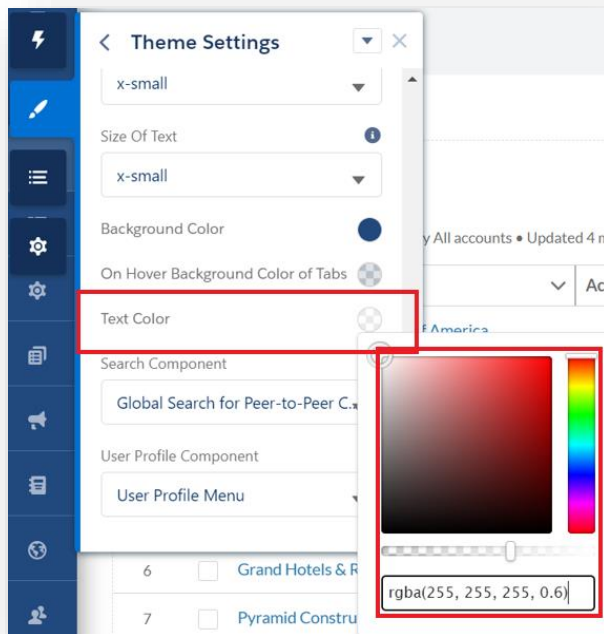


6. Users can change the text as well as icon size ranging from x-small to large as per their preference by selecting the appropriate size from the **Size of text** and **Size Of icons** picklists respectively.



7. Users can select the background and text color of the vertical menu bar as per their preference from the **Background Colour**, **Selected Tab Background Colour**, and **Text Colour**, color picker property of the component as shown below.

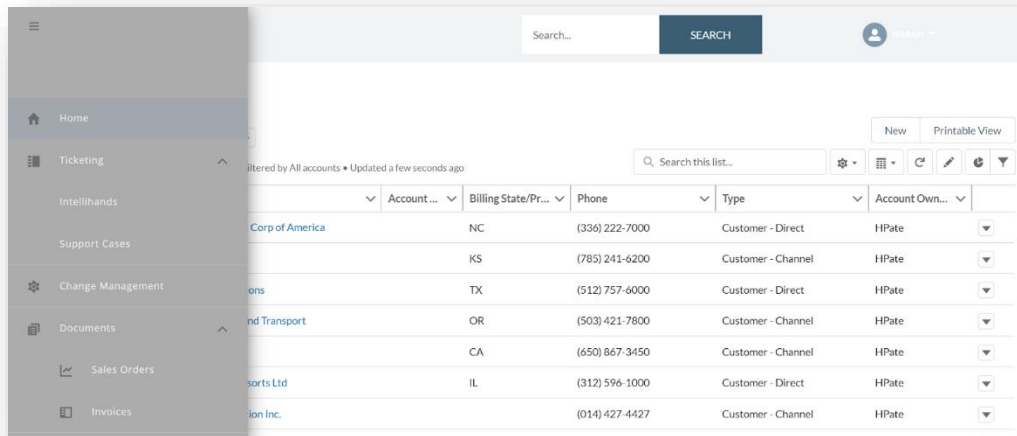
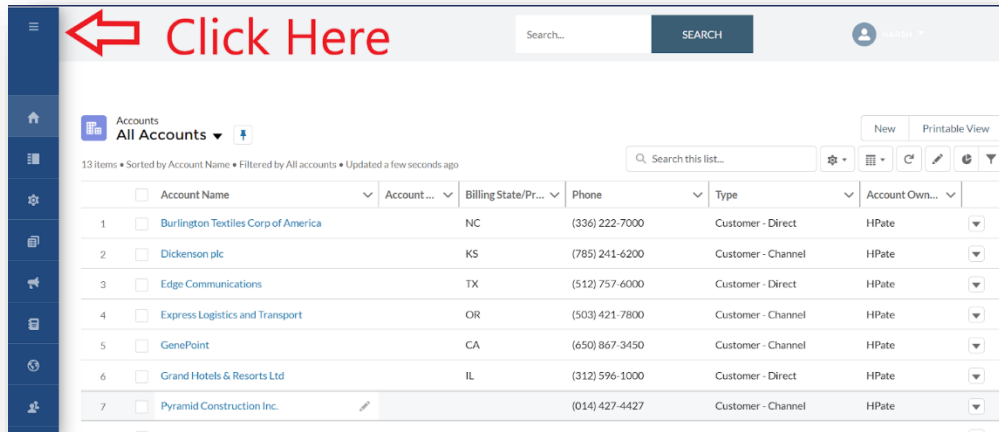




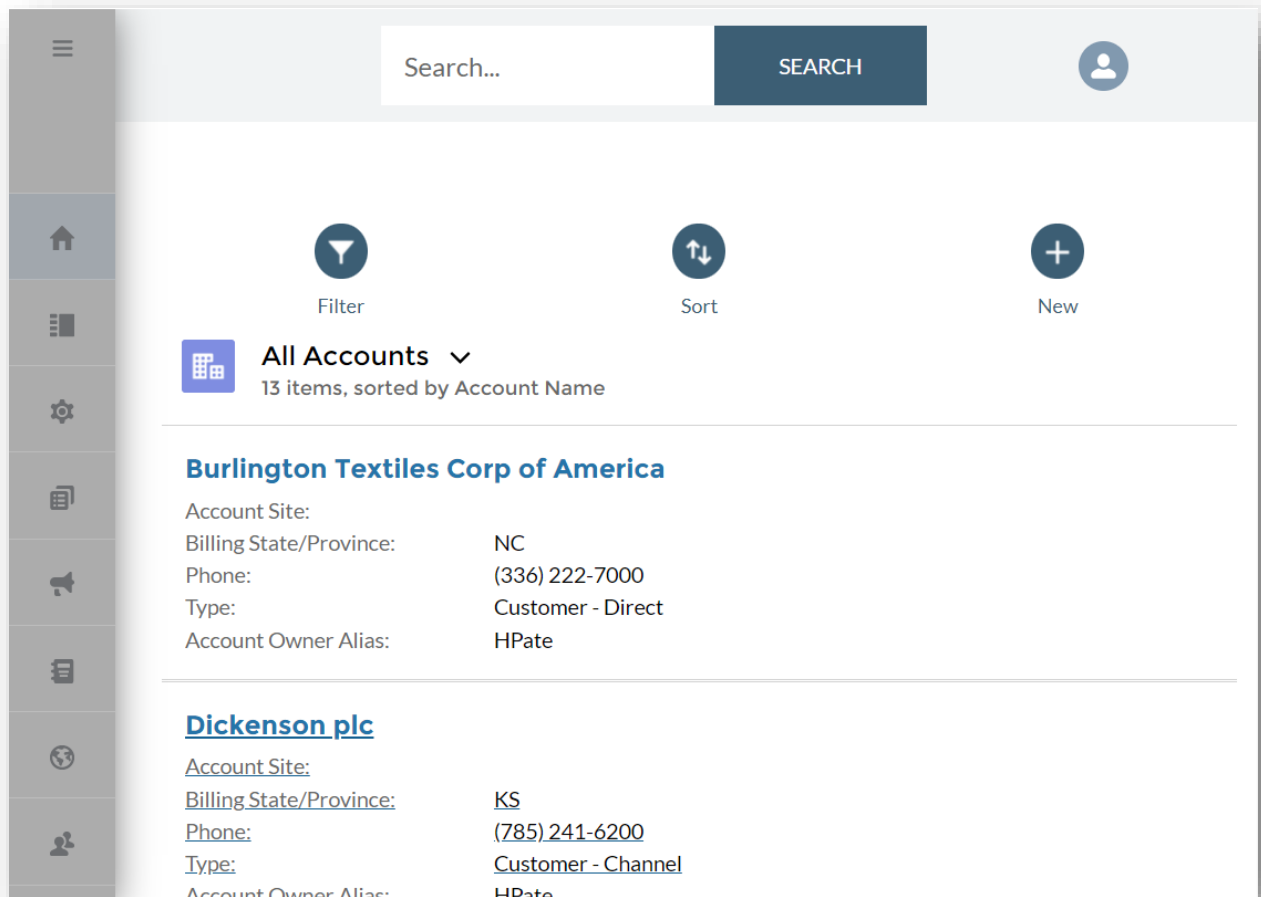
Different View Options

The following images demonstrate the Vertical Menu Bar in three different view options in the Lighting Community.

- **Desktop View:**



- **Tablet View:**



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