Page Layouts and Record Types in Salesforce

Page Layout

The organization of fields, custom links, and related lists on an object detail or edit page.
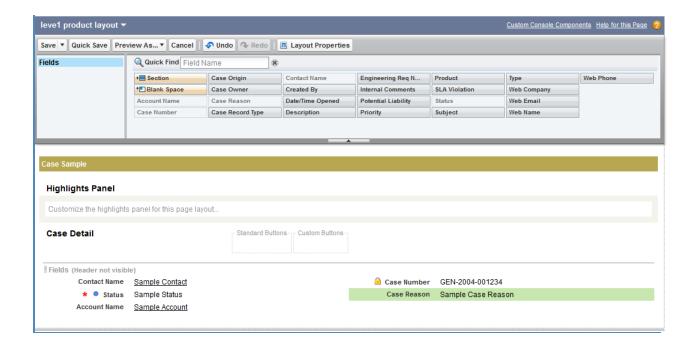
Used to organize UI pages for your users:

- ➢ Which fields, related lists, and Custom links a user's sees.
- ➢ Field properties – visible, read-only and required.
- ➢ Page section customizations.

Creating Page Layout:

Following is example to create page layout for Position object.

- ➢ Set Up->Customize->Position->Page Layout->Click on New button
- ➢ Fill Mandatory details
- ➢ Drag and drop required to the layout and save page layout.

Record Types

Record types allow you to associate different business processes and subset of pick list value to different users based on their user profile.

They are used to drive which page layouts users see when viewing records, based on their user profile.

Benefits of record types:

- ➢ Tailors user interaction experience to specific business needs.
- ➢ Allows for easier administration as there are fewer fields to maintain.
- ➢ To assign the different Page layouts to different users based on their profiles.

> ➤ To enable different sets of Standard/Custom Picklist values for two different users using the same page layout.

Creating Record Types:

Example to create record types: In this example I am creating record type for Case object.

Step1: Setup->Customize->Case->Record Type

Case Record Type

Help for this Page ❓

Use this page to create and maintain record types for your organization. You can display different page layouts and picklist values based on record types.

To use record types, add the Record Type field to your page layouts.

Case Record Type	New Page Layout Assignment	Case Record Type Help ❓
No record types defined		

Step 2: Click on New button and fill all mandatory fields and select profiles.

New Record Type
Case

Step 1. Enter the details   **Step 1 of 2**

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type   **❙** = Required Information

Existing Record Type	--Master-- ▾
Record Type Label	Level1 Product Cases
Record Type Name	Level1_Product_Cases ⓘ
Support Process	Case Support process ▾
Description	
Active	☑

Select the Enable for Profile checkbox to make the new record type available to a profile. Users assigned to this profile will be able to create records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select the Make Default checkbox.

Profile Name	Record Types Currently Available	☑ Enable for Profile	☐ Make Default
Admin		☑	☑
Contract Manager		☑	☑
Custom: Marketing Profile		☑	☑
Custom: Sales Profile		☐	

Step 3: Click on NEXT button

New Record Type
Case

Step 2. Assign page layouts   **Step 2 of 2**

Case Record Type	Level1 Product Cases
Record Type Name	Level1_Product_Cases
Support Process	Case Support process
Description	

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

◉ Apply one layout to all profiles   -- Select Page Layout -- ▾
○ Apply a different layout for each profile

Profile:	Page Layout
Admin	Case (Marketing) Layout ▾
Contract Manager	Case (Marketing) Layout ▾
Custom: Marketing Profile	Case (Marketing) Layout ▾
Custom: Sales Profile	Case (Marketing) Layout ▾
Custom: Support Profile	Case (Marketing) Layout ▾
Customer Portal Manager Custom	Case (Marketing) Layout ▾
Customer Portal Manager Standard	Case (Marketing) Layout ▾
Gold Partner User	Case (Marketing) Layout ▾
High Volume Customer Portal	Case (Marketing) Layout ▾
Marketing User	Case (Marketing) Layout ▾

💬 Chat ⚠

Step 4: Select page layout and click **SAVE**

Step 5: Page Layout Assignment

Go to **Record Type** or **Page Layout** and click on **Page layout Assignment**

Assign page layout to record types based on profiles.

Edit Page Layout Assignment

Case

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Save   Cancel

Page Layout To Use: -- Select Page Layout --   6 Selected   0 Changed

Record Types (1-2 of 2)

Profiles	Master	Level1 Product Cases
Admin	Case Layout	Case (Marketing) Layout
Contract Manager	Case Layout	Case (Marketing) Layout
Custom: Marketing Profile	Case (Marketing) Layout	Case (Marketing) Layout
Custom: Sales Profile	Case (Sales) Layout	Case (Marketing) Layout
Custom: Support Profile	Case (Support) Layout	Case (Marketing) Layout
Customer Portal Manager Custom	Case Layout	Case (Marketing) Layout
Customer Portal Manager Standard	Case Layout	Case (Marketing) Layout
Gold Partner User	Case Layout	Case (Marketing) Layout
High Volume Customer Portal	Case Layout	Case (Marketing) Layout
Marketing User	Case Layout	Case (Marketing) Layout
Read Only	Case Layout	Case (Marketing) Layout
Solution Manager	Case Layout	Case (Marketing) Layout
Standard User	Case Layout	Case (Marketing) Layout
System Administrator	Case Layout	Case (Marketing) Layout

Save   Cancel