

# Page Layouts in Salesforce | Create, Edit Assign new page layouts

## Page Layouts in Salesforce | Create, Edit Assign new page layouts

In this [Salesforce tutorial](#) we are going to learn about What is a page layout in [Salesforce](#), How to access [page layouts in Salesforce](#), How to edit page layout in salesforce, How to create new page layout in salesforce and how to assign a page layout to a [profile in Salesforce.com](#).

### What is a page layout in Salesforce?

Page Layouts in Salesforce control the layout. It is a set of custom links, buttons, fields, S-controls, visualforce and [related lists](#) on the object record page. Using **Page Layouts in Salesforce** we can determine which fields are set to visible, read-only and mark that field as required

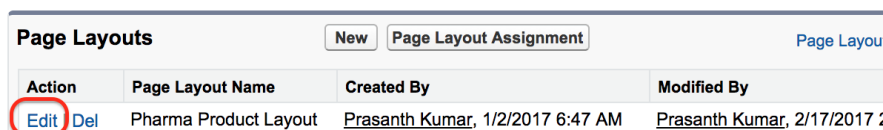
In Salesforce.com, when we open a particular record all the fields that are associated with that object are listed down. If we want to customise the visual appearance of the field, modifying the page layout. Every object in Salesforce, Standard objects or [Custom object](#) should have one minimum Page Layout which is called default page layout. A page layout gets created default when we create an object in Salesforce.

- Page Layouts in Salesforce is created with Object name by default.
- There will be one minimum page layout for every object by default.
- Multiple page layout can be created to an object.

### How to access Page Layouts in Salesforce?

**Go to Object | Page Layouts | Edit.**

In this Salesforce Tutorial, we are going to access Pharma product Page Layouts in Salesforce.



Page Layouts			
		<a href="#">New</a>	<a href="#">Page Layout Assignment</a>
<a href="#">Page Layout</a>			
Action	Page Layout Name	Created By	Modified By
<a href="#">Edit</a> <a href="#">Del</a>	Pharma Product Layout	<a href="#">Prasanth Kumar</a> , 1/2/2017 6:47 AM	<a href="#">Prasanth Kumar</a> , 2/17/2017 1

- Click on Edit button as shown above.

The screenshot shows the Salesforce Page Layout Editor. On the left, the 'Fields' sidebar is expanded, showing a list of fields for the 'Pharma Product' object. The 'Information' section on the right shows the current page layout configuration. The fields are organized into sections: 'Section' (Created By, Last Modified By, Business Type, Category), 'Blank Space', and 'Product Information' (Pharma Product Name, Product name, product type, product specs, Price, Stock remaining, Manufacturer, Business Type, Total Sample Quantity, Category, Sub category). The 'Owner' is set to 'Sample User'.

When a page layout in salesforce is edited we can observe Fields, Buttons, Quick Actions Salesforce1 & lightning actions, Expanded Lookups, Related Lists, Report Charts on the side bar as shown above. When we click on Fields we can access which fields are present in Pharma Product object as shown above.

## How to Create or Edit page layout in Salesforce?

A Page layout in SFDC can be modified by rearranging fields, adding custom buttons and related list to the page layout. As shown below we are going to arrange field in two columns.

The screenshot shows the Salesforce Page Layout Editor with the 'Fields' sidebar expanded. The 'Information' section on the right shows the current page layout configuration. The fields are organized into two columns: the left column contains 'Pharma Product Name', 'Product name', 'product type', 'product specs', 'Price', 'Stock remaining', 'Manufacturer', 'Business Type', 'Total Sample Quantity', 'Category', and 'Sub category'; the right column contains 'Owner', 'Sample User', 'Manufacturer', 'Sample Manufacturer', 'Business Type', 'Sample Business Type', 'Category', 'Sample Category', 'Sub category', 'Sample Sub category', and 'Total Sample Quantity'.

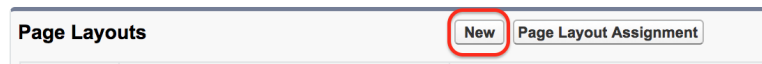
To change the position of the field in page layout simply drag and drop the field. And finally click on Save button.

- To check the page layout go to pharma product record as shown below.

The screenshot shows the Salesforce record page for 'Pharma Product Vitamin D'. The page layout is configured to show the following fields in two columns: 'Pharma Product Name' (Vitamin D), 'Product name', 'product type' (low level), 'product specs', 'Stock remaining', 'Price' (\$599), 'Created By' (Prasanth Kumar, 1/29/2017 10:19 PM), 'Owner' (Prasanth Kumar [Change]), 'Manufacturer', 'Business Type', 'Category', 'Sub category', 'Total Sample Quantity' (150), and 'Last Modified By' (Prasanth Kumar, 1/29/2017 10:19 PM). The 'Save' button is highlighted in the top left corner.

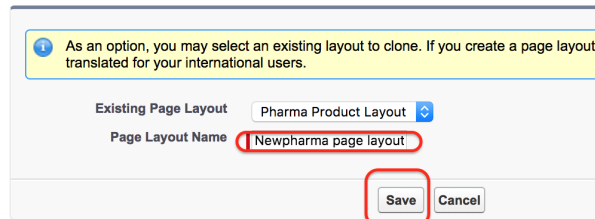
## How to create custom Page layouts in Salesforce?

Multiple custom Page layouts in Salesforce can be created. To create custom Page layouts in Salesforce go to object | Page Layouts | Create New.

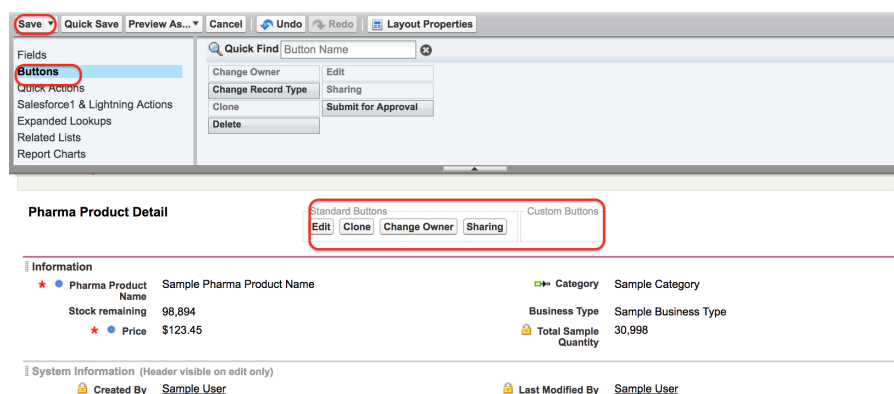


- Click on New button to create New Page Layout for the object Pharma Product.

### Create New Page Layout

The screenshot shows a dialog box titled 'Create New Page Layout'. It contains a message: 'As an option, you may select an existing layout to clone. If you create a page layout translated for your international users.' Below this, there are two fields: 'Existing Page Layout' with a dropdown menu showing 'Pharma Product Layout', and 'Page Layout Name' with the text 'Newpharma page layout'. At the bottom right, there are 'Save' and 'Cancel' buttons. The 'Save' button is circled in red.

- Select the existing page layout from the drop down menu.
- Enter page layout name.
- Click on Save button.

The screenshot shows the 'Pharma Product Detail' page layout editor. On the left, there is a sidebar with 'Fields' and 'Buttons' sections. The 'Buttons' section is highlighted with a red circle. In the main area, there is a 'Quick Find' bar and a list of buttons: 'Change Owner', 'Change Record Type', 'Clone', 'Delete', 'Edit', 'Sharing', and 'Submit for Approval'. Below this, there is a section for 'Standard Buttons' and 'Custom Buttons'. The 'Standard Buttons' section has buttons for 'Edit', 'Clone', 'Change Owner', and 'Sharing', which are circled in red. The 'Custom Buttons' section is empty. Below the buttons, there is a table with product details: 'Pharma Product Name', 'Sample Pharma Product Name', 'Stock remaining', '98,894', 'Price', '\$123.45', 'Category', 'Sample Category', 'Business Type', 'Sample Business Type', and 'Total Sample Quantity', '30,998'. At the bottom, there is a 'System Information' section with 'Created By' and 'Last Modified By' fields.

When we click on Save button a new page layout editor will be displayed as shown above. Here we can customise Fields, Buttons, Custom links and other related list. As shown above we have removed delete button, change owner, edit record type in this New Pharma Product page layout.

- Finally click on Save button.

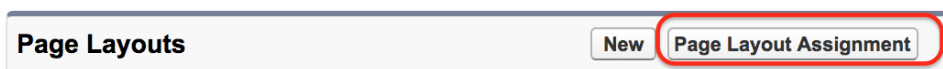
Page Layouts			
		New	Page Layout Assignment
Action	Page Layout Name	Created By	Modified By
Edit   Del	Newpharma page layout	Prasanth Kumar, 2/19/2017 9:46 PM	Prasanth Kumar, 2/19/2017 9:51 PM
Edit   Del	Pharma Product Layout	Prasanth Kumar, 1/2/2017 6:47 AM	Prasanth Kumar, 2/19/2017 9:45 PM

- We have successfully created New page layout in Salesforce.

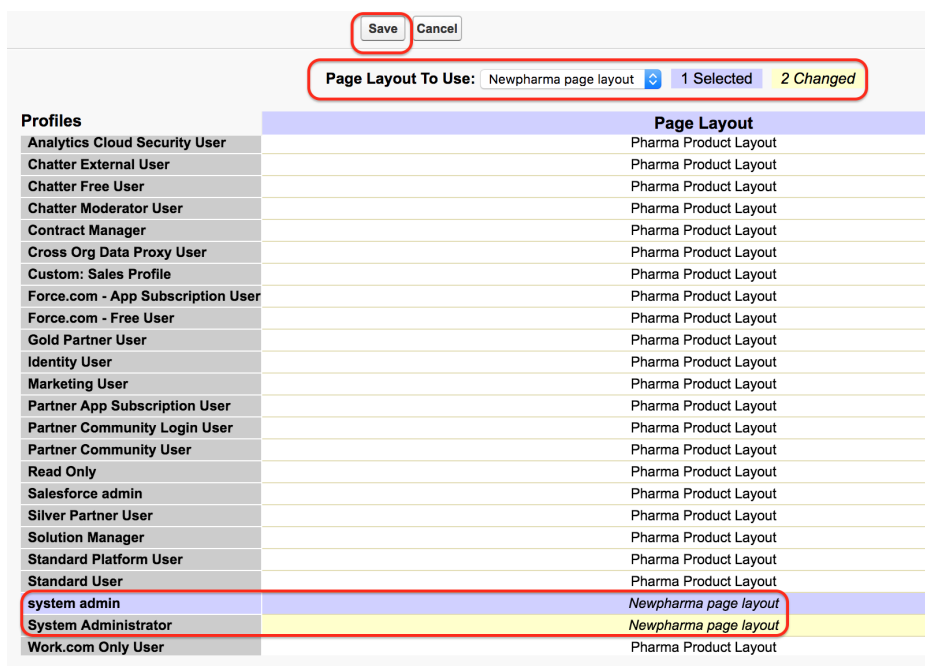
## Page Layout Assignment to a Profile.

Custom page layout in Salesforce can be assigned to multiple profiles. Check below how to assign a page layout to a profile.

- Click on **Page Layout Assignment** button as shown below.

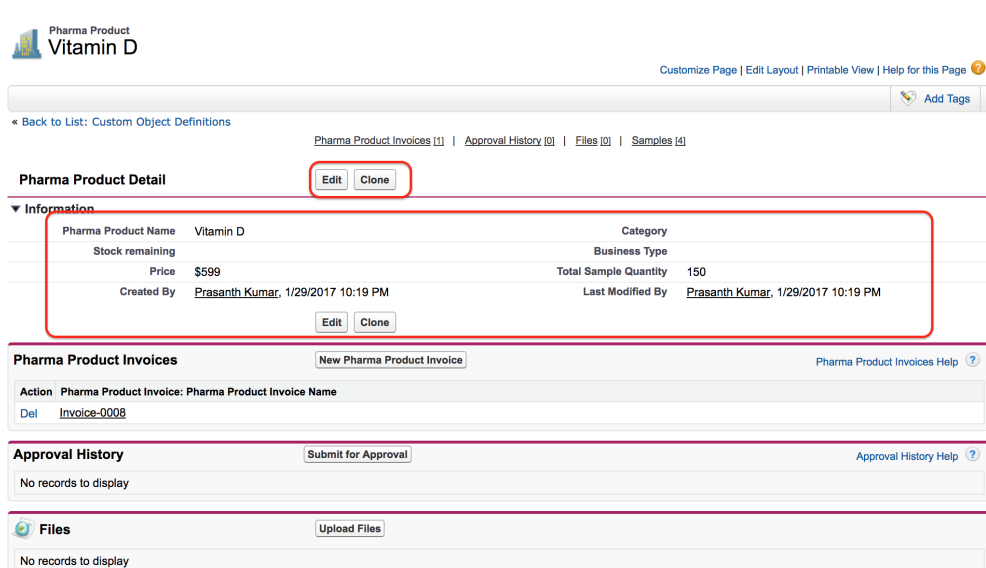


- Now Layout mapping page will be opened.

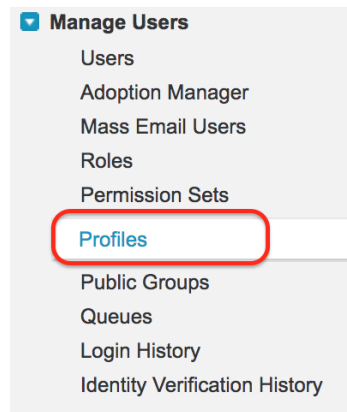


- Click on Profile and select the page layout to use. Here we have changed page layouts to system admin and System administrator profile.
- Finally click on Save button.

Now to a record and compare the page layout with previous page layout as shown below.



To check the Page layout assignment in Salesforce go to **Setup | Administer | Manage User | Profile**.



- Click on **Profiles** and go to **System administrator**.

<input type="checkbox"/>	Action	Profile Name ↑	User License	Custom
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del ...</a>	<a href="#">Salesforce admin</a>	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Silver Partner User</a>	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Solution Manager</a>	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Standard Platform User</a>	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">Standard User</a>	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del ...</a>	<a href="#">system admin</a>	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Clone</a>	<a href="#">System Administrator</a>	Salesforce	<input type="checkbox"/>

- Now go to custom object layouts as show below.

Custom Object Layouts			
Fr	<a href="#">Fr Layout</a> [ <a href="#">View Assignment</a> ]	Sales Team	<a href="#">Sales Team Layout</a> [ <a href="#">View Assignment</a> ]
Hospital	<a href="#">Hospital Layout</a> [ <a href="#">View Assignment</a> ]	Sample	<a href="#">Sample Layout</a> [ <a href="#">View Assignment</a> ]
Invoice	<a href="#">Invoice Layout</a> [ <a href="#">View Assignment</a> ]	Visit	<a href="#">Visit Layout</a> [ <a href="#">View Assignment</a> ]
Pharma Product	<a href="#">Newpharma page layout</a> [ <a href="#">View Assignment</a> ]	www.tutorialkart.com	<a href="#">www.tutorialkart.com Layout</a> [ <a href="#">View Assignment</a> ]
Pharma Product Invoice	<a href="#">Pharma Product Invoice Layout</a> [ <a href="#">View Assignment</a> ]		

Here we can observe that for Profile System administrator the default page layout is **Newpharma page layout**.

## Conclusion

In this **Salesforce Tutorial** we have learned about Page layouts in Salesforce. In our next upcoming Salesforce Tutorial, we are going to learn about Homepage layouts and page layout components in salesforce.com.

▮ What is login.Salesforce.com

▮ Enabling Caching and Automcomplete at Salesforce login

▮ Overview of ERP and CRM

▮ What is Cloud Computing

▮ Why Salesforce CRM is #1 on Demand

## Section 2 : Designing your Data Model

## Section 3 : Building your Data Model

▮ Understanding Salesforce.com application

▮ How to create an App in SFDC?

▮ How to create custom object in SFDC

▮ Creating fields using different field types in Salesforce.com

▮ Overview on Salesforce Object Relationships

▮ How to create Master Detail relationship in SFDC?

▮ Cannot create Master Detail Relationship?

▮ How to create Lookup relationship in salesforce.com?

▮ How to create Many to Many Relationship in Salesforce?

▮ What is Schema Builder

## Section 4 : Implementing Business Logics

▮ What is a Formula Filed?

▮ What are Cross Object Formulas?

▮ What are Validation Rules?

▮ Roll up Summary Fields

▮ Field Dependencies

## Section 5 : Setting up User Interface

▮ Page Types and Page Elements

▮ What are page Layouts?

▮ Home page layouts and components

▮ Why Documents are used in Salesforce

▮ List Views

## Section 6 : Customizing Standard Salesforce Application

▮ How to Customise Standard Salesforce application

## Section 7 : Salesforce Security Model

▮ Overview on Salesforce security Model

» How to create New Users in SFDC?

» What is SAML?

» Public groups in Salesforce

» Role Hierarchies in Salesforce.com

» How to create and manage Profiles

» What is Field Level Security?

» How to use Permission Sets?

» Control Record visibility using Organisation wide Defaults

» Control Record visibility using Role Hierarchy

» Control Record visibility using Sharing Rules

» What are Record Types and how can we configure

» What are Page Types and page Elements

## Section 8 : Data Management

» Different Data Management Tools

» How to install Apex Data Loader in macOS and Windows

» How to Insert a record using Apex Data Loader

» How to Update and Insert records Apex Data Loader

» How to Delete and Export records Apex Data Loader

## Section 9 : Salesforce.com Audit

» Field History Tracking

» Setup Audit Trail

## Section 10 : Automate Business Process

» How to create New Email Template in Salesforce

» Salesforce Workflow Rules Overview

» Creating Workflow rules with Rule Criteria & Workflow actions

» Configuring Approval Process

» Assignment rules for Leads and Cases

## Section 11 : Reports and Dashboards

» What is a report in Salesforce and how we create them?

» Salesforce Reports and Dashboards Overview

» How to use report builder?

» How to create Summary reports?

» How to create matrix reports?

» How to create salesforce Dashboard, Different Dashboard Components, Customizing Dashboard Components, How to create Dynamic Dashboard in Salesforce, Deleting and Printing Salesforce Dashboards

» Creating Dashboards with Dashboard Components for Tabular and Joined Reports

## Section 12 : Salesforce Service Cloud

» Overview on Salesforce Service Cloud

## Section 13 : Portal and Sites

## Section 14 : AppExchange

» What is Salesforce AppExchange.

## Section 15 : Managing Sandboxes

» What is Salesforce Sandbox?.

» Different Sandboxes and Sandbox Environment Types.

» How to create Salesforce Sandbox template?.

» How to create Salesforce Sandbox?

» How to login Salesforce Sandbox?

## Section 16 : Salesforce lightning

» How to create Salesforce custom domain?

» What is Salesforce lightning Experience?

» What is Salesforce lightning component Framework?

» Creating first Salesforce lightning App

» Styling Salesforce lightning App

» Lightning Componnet : aura:attribute tag

» What is Salesforce DX?

» Create Salesorforce DX project

» Salesforce Dev Hub Setup step-by-step

» Creating Sratch Org