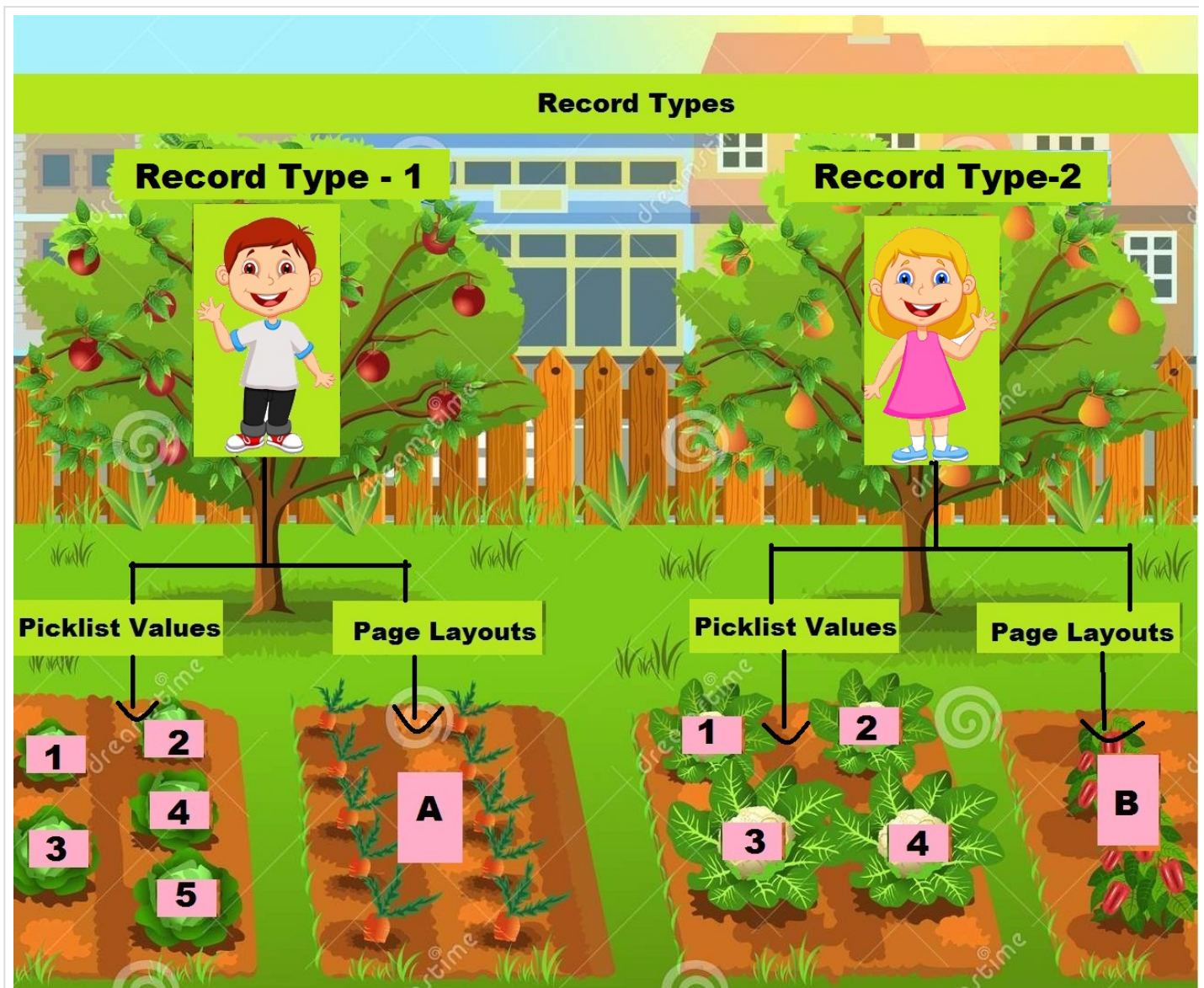


# Record Types in Salesforce

ON **MAY 14, 2019** BY **AYUSHI TIWARI**

Hello Salesforce Thinkers, In our previous blog we learned about [Data Export Service](#), in this blog we are going to learn about **Record Types in Salesforce**.

Let's start learning it... Record Types are such a commonly used feature within Salesforce, it's good to get a good knowledge of how to best utilize them.



Let's understand it as , we have one object that have different types of information we need to store them in a single object, we use record types to store these information.

we have created two record types, Record type-1 and Record Type-2 which have different page layouts and different values for a picklist field.

### What is Record Type?

We need the ability to **organize** and **gather** data in **different ways** and at **different times** around the **same object**. Record Types gives us the ability to fulfill these type of requirements.

Record types let you offer different **business processes**, **picklist values**, and **page layouts** to **different users**.

### Why use Record Types?

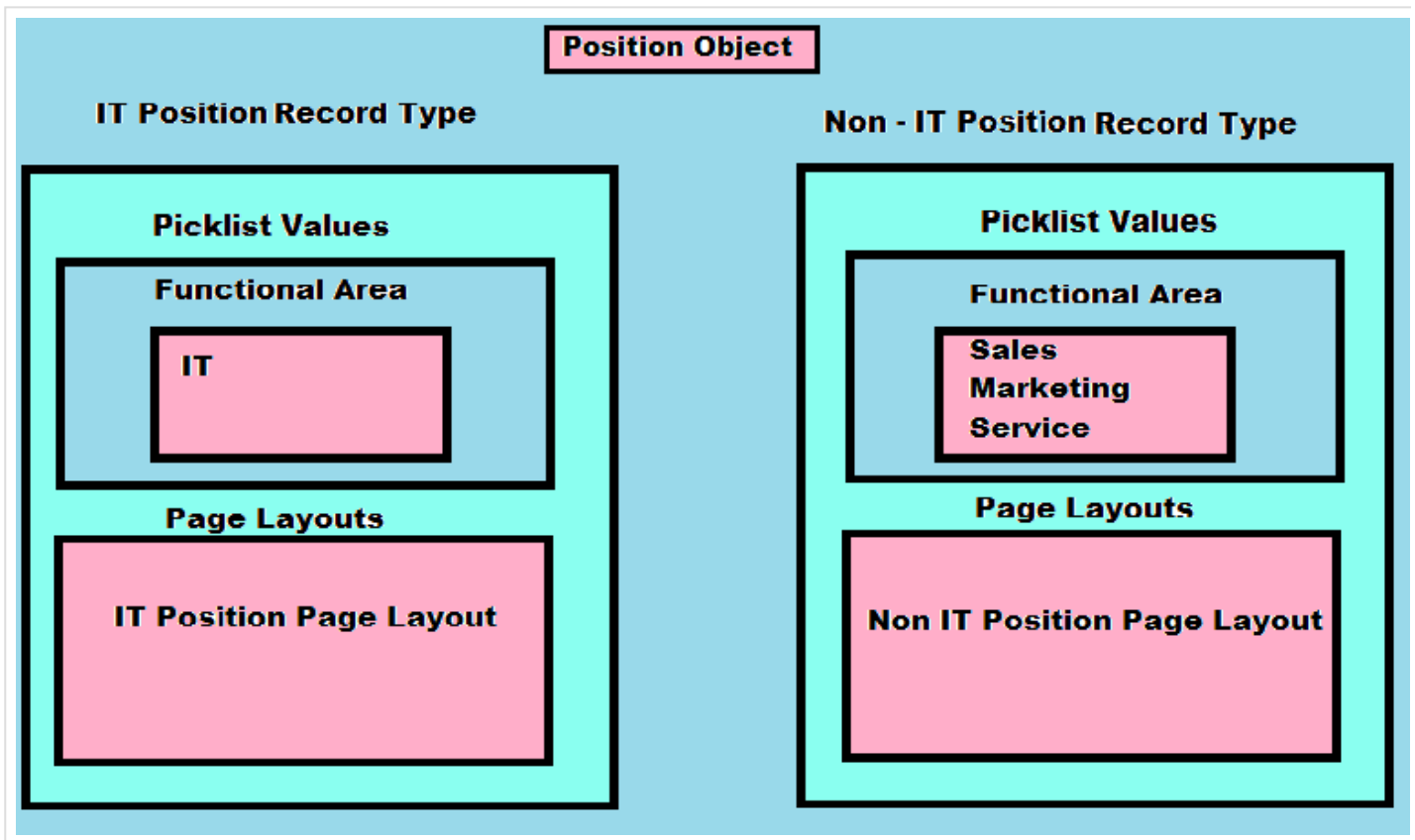
- Record Types help you implement your **custom business processes**.
- Allows for easier administration as there are **fewer fields** to maintain.
- Record Types are used to assign the **different Page layouts** to **different users** based on their profiles.
- We can enable different sets of **Standard/Custom Picklist** values for two different users using the same page layout.
- Record types allow you to **segment** a particular object for **specific uses**.

### Creating Record Types :-

Record Type controls picklist values and page layouts.

Let's take an example there is an organization which deals with **Positions**. which have **two types** of position for **IT and Non-IT candidates**. It is possible to have a single Salesforce instance to manage them both. In this case record type can govern the access to records to respective candidates.

Understand it by the below diagram.



We have an object called Position which have two types of positions IT and Non IT. There is a picklist field called Functional Area having different values for both IT and Non IT positions, Also Both of the positions have different page layouts, IT Position Page Layout and Non-IT Position Page Layout.

Let's do it practically.

First we will create a page layout.

Go to **Setup >> Objects >> Position >> Page Layout >> Click on New Button**

**Create New Page Layout** [Help for this Page](#)

As an option, you may select an existing layout to clone. If you create a page layout without cloning, your page layout will not include the standard sections whose names are translated for your international users.

Existing Page Layout: Position Layout

Page Layout Name: Non-IT Position Layout

**Save** **Cancel**

Click on Save and Change the layout according to Non-IT Positions. Similar to this Create a IT Position Layout.

Now we will create Record Types for These Positions.

Go to **Setup >> Objects >> Position >> Record Type**

Record Types

New

Page Layout Assignment

No record types defined

Click on **New** button and fill all **mandatory fields** and select profiles.

New Record Type

Position

Help for this Page ?

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

IT Position

Record Type Name

IT\_Position

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	<input checked="" type="checkbox"/> Enable for Profile	<input type="checkbox"/> Make Default
Analytics Cloud Integration User	Non-IT Positions (Default) ,IT Position	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	Non-IT Positions (Default) ,IT Position	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chatter External User	Non-IT Positions (Default) ,IT Position	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chatter Free User	Non-IT Positions (Default) ,IT Position	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Chatter Moderator User	Non-IT Positions (Default) ,IT Position	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	Non-IT Positions (Default) ,IT Position	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Now Link it to the IT Position Page Layout , and click on **save**.

Now we Customize picklist values for **Functional Area** field. For this Click Edit next to the field and choose values, here we are creating this for **IT Positions** so we choose **IT** in the **picklist**. As shown in below figure:

Record Type Edit Help for this Page ?

## Functional Area

General Properties

Field Label	Functional Area
Record Type	IT Position

Picklist Values

Select an item from the Available Values list and add it to the Selected Values list to include it as a picklist value for this Record Type. Note that removing an item from the picklist does not remove it from any existing records. Finally, select a default picklist value for this Record Type.

Available Values

Selected Values

Sales

Marketing

Service

Add

Remove

IT

Default

IT

Save

Cancel

Similar to this create another record type for **Non-IT Positions**. And Link it to the **Non-IT Position Page Layout** , and click on **save**.

For Functional Area field Choose Values which are related to Non-IT Positions. Then **click** on **Save**.

Record Type Edit Help for this Page ?

## Functional Area

General Properties

Field Label	Functional Area
Record Type	Non- IT Position

Picklist Values

Select an item from the Available Values list and add it to the Selected Values list to include it as a picklist value for this Record Type. Note that removing an item from the picklist does not remove it from any existing records. Finally, select a default picklist value for this Record Type.

Available Values

Selected Values

IT

Sales

Marketing

Service

Add

Remove

Default

--None--

Save

Cancel

Now see what we have done

Go To **Position Tab** and Click On **New** Button. we can **select** a **Record type** which routed us on the **appropriate Page layout**.

New Position Help for this Page ?

## Select Position Record Type

Select a record type for the new position. To skip this page in the future, change your record type settings on your personal setup page.

**Select Position Record Type**

Record Type of new record Non-IT Positions ▼

IT Position  
 Non-IT Positions

Available Position Record Types

Record Type Name	Description
IT Position	Record type for all IT positions
Non-IT Positions	Record type for all non-IT positions

If we select **IT Position** we are Routed to the **IT Position Page Layout**. Also in that layout the **Functional Area** field have values according to **IT Positions**.

And if we select **Non-IT Position** we are Routed to the **Non-IT Position Page Layout**. Also in that layout the **Functional Area** field have values according to **Non-IT Positions**.

**Record Types** are Majorly used to manage different-different Business process.

## Considerations while using Record Types:-

- Some special picklist fields aren't available for record types because they are used exclusively for **sales processes, lead processes, support processes, and solution processes**:
  - **Opportunity Stage**
  - **Case Status**
  - **Solution Status**
  - **Lead Status**

We can use these fields to provide **different picklist values** for **different record types** by assigning a different process to each record type.
- We **can't edit** or **delete** a record type for an object if the object is **referenced in Apex**.
- We **can't deactivate a record type** if it is in use by an **email routing** address for Email-to-Case or On-Demand Email-to-Case.
- These campaign member picklists aren't available for record types:
  - **Status**
  - **Salutation**
  - **Lead Source**

Thank you for Reading this blog, Hope you all like it.