Salesforce Record Types – Complete Tutorial for beginners

Record type is an tool provided by Salesforce which helps you to configure different business processes, assign page layouts, and pick-list values. Salesforce Record types can be linked to user profiles and can be used in different ways which we will go through in this article.A few prominent usage are

1. Displaying different page layouts for one object based on certain criteria
2. Showing different pick list values based on the user criteria
3. Managing multiple divisions within the same Salesforce instance
4. Selecting the layouts based on a pick list values etc.

You can achieve various important functionality by defining and using Record Types in Salesforce. This helps you to do so without putting in custom APEX code or VisualForce pages.

Video Demonstration

The video demonstrates creating a Record Type for Quote object. Quote has pickl ist values for Status. The requirement is that if Status field equals 'Accepted' then all the fields of the Quote record should have read-only access for specified users.
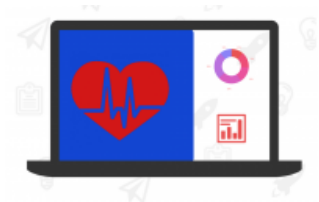
[/fusion_youtube]

In this above video demonstration we have seen the following examples how we can leverage Record Types to achieve an objective

"If a Quote is approved then it all the fields must become read only and changes should not be allowed for these Quotes. However other Quotes must be allowed to be edited."

- Create a Page layout of Quote with fields being non editable
- Creation of Record Type
- Assignment of Record Type
- Creation of a workflow to update the record type and making the Quote non editable.
- Demonstration that on setting this up and showing that whenever a Quote is marked as Approved, it does not allow any more update.

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Why use Record Type

Record Types in Salesforce allows you to customize various features of both standard and custom objects based on profile and when different layouts are to be selected for particular pick list field value. Record type does not affect record level security i.e. if a user does not have the view or edit permission of an object (or fields in the object), same permissions will be continued even if the record type is made available for that user. Multiple record types can be created for the same object to customize as needed.

Multiple Division of same company in a single Salesforce instance

If there is an organization which deals in lets say Toys and Cosmetics having them as different divisions with separate sales team, 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 team members. The senior management can however still see a consolidated pipeline.

Other business case of using record types

1. All the fields of a Quote record should become read-only for specified users when the status of the quote is changed to "Accepted".
2. Selecting the page layouts based on the pick list values. For example: In product object, depending on the product family pick list value layout related to that pick list value can be selected.

Considerations while using Record Types

Following are the considerations while using record types in Salesforce. So keep them in mind to ensure that you do not run into any trouble using them

- Certain pick-list fields are **not available** for record types because they are used exclusively for certain process. Examples are Status fields in Case, Lead and Solution Object and Stage field in Opportunity.
- It is advisable to have less than 200 record types in any Salesforce instance.
- Editing or deleting record types via APEX is not supported.
- If a record type is being used in email to case situation, it cannot be deactivated.