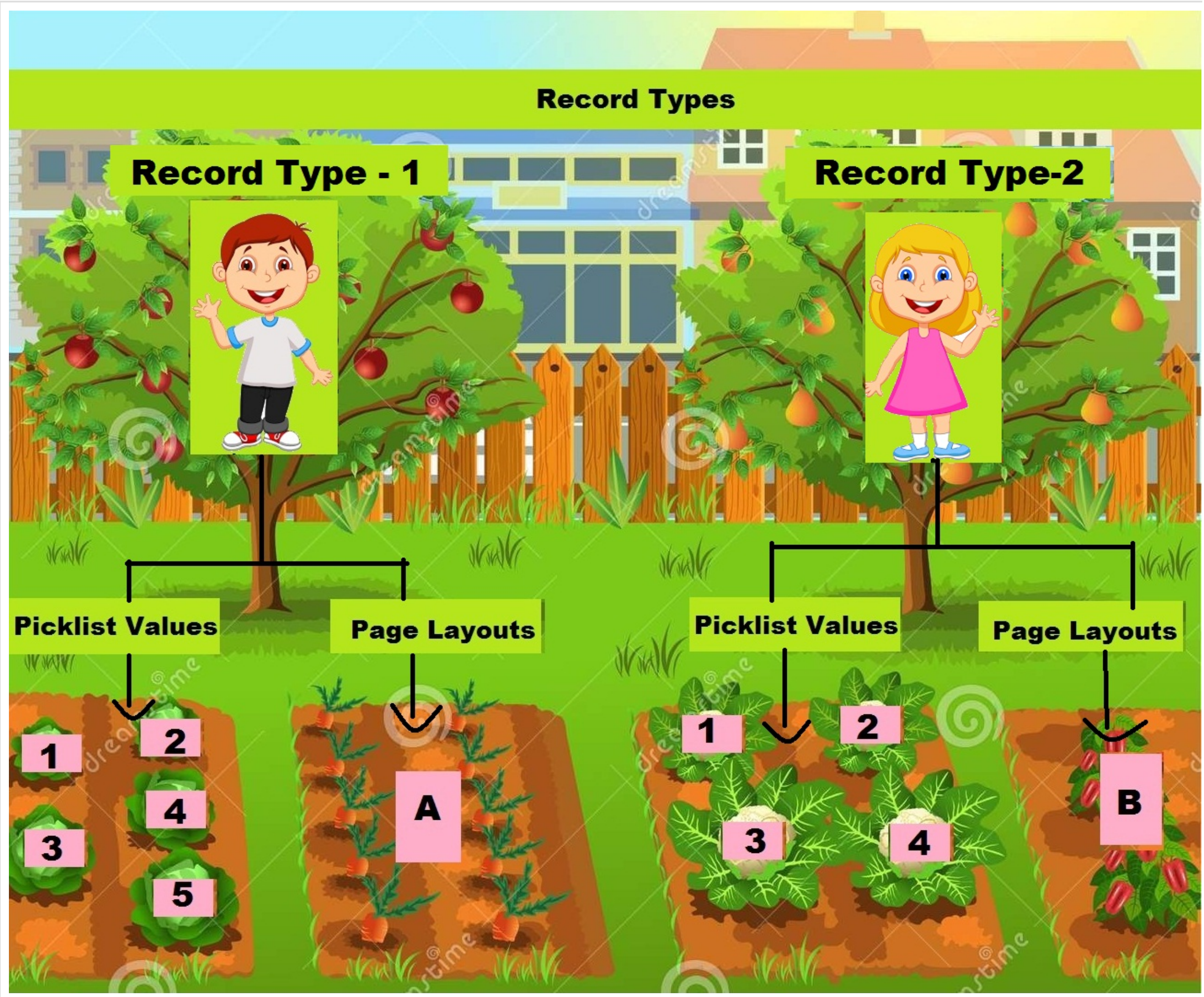
Record Types in Salesforce

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?

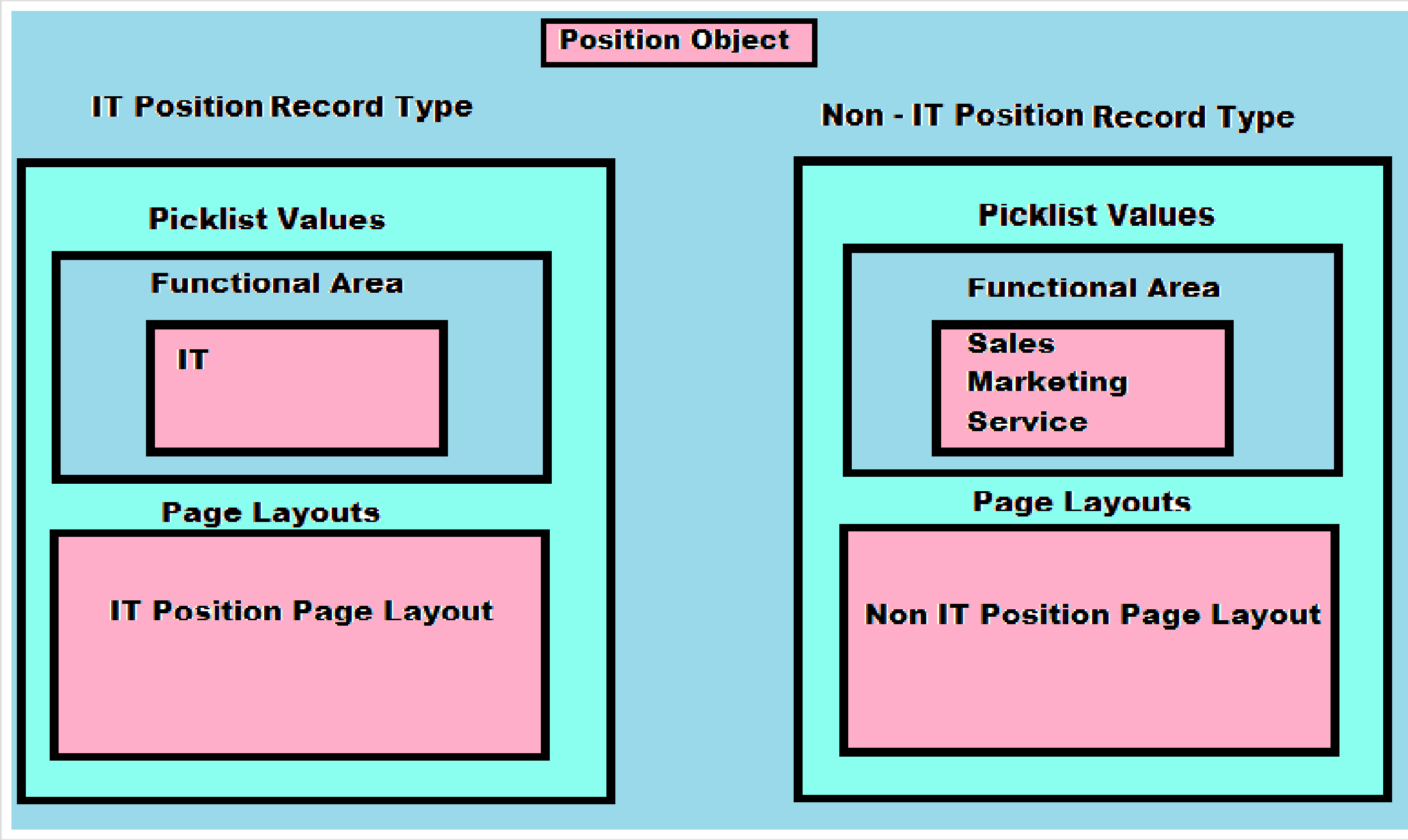
- Record Types help you implement your **custom business processes**.
- Allows for easier administration as there are **fewer fields** to**maintain**.
- Record Types are used to assign the **different Page layouts** to **different users** based on their profiles.
- We can enable different sets of **Standard/Custom 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.

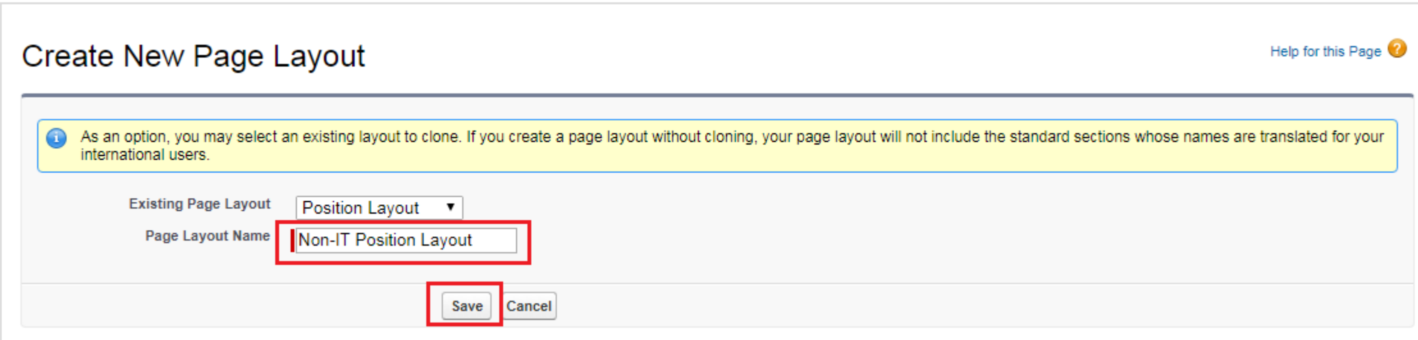


We have an object called Position which have two types of positions IT and Non IT. There is a picklist field called Functional Area having different values for both IT and Non IT positions, Also Both of the positions have different page layouts, IT Position Page Layout and Non-IT Position Page Layout.

Let's do it precticaly.

First we will create a page layout.

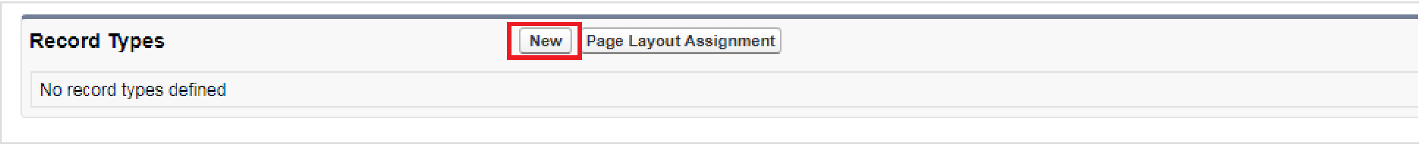
Go to **Setup >> Objects >> Position >> Page Layout >> Click on New Button**



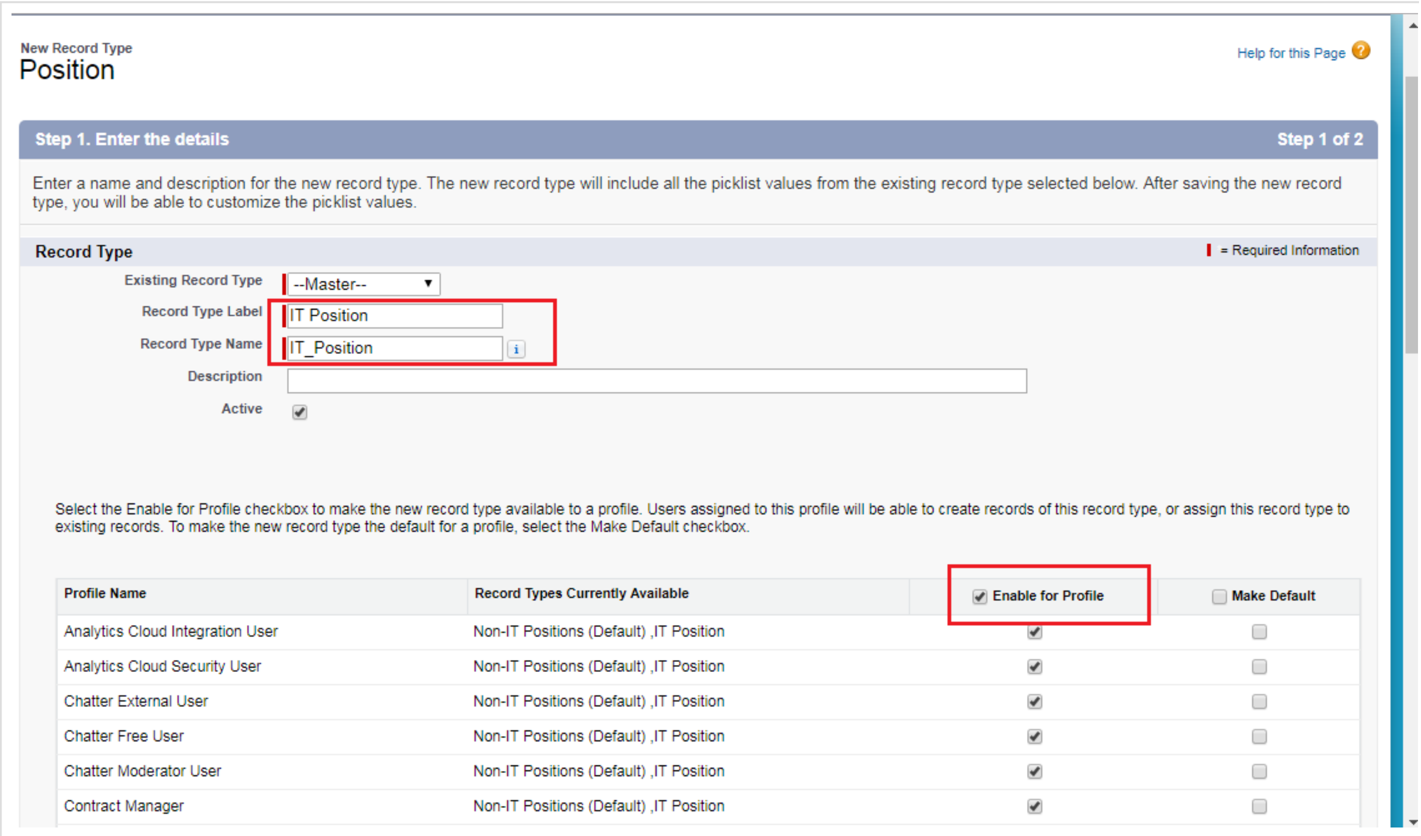
Click on Save and Change the layout according to Non-IT Positions. Similar to this Create a IT Position Layout.

Now we will create Record Types for These Positions.

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

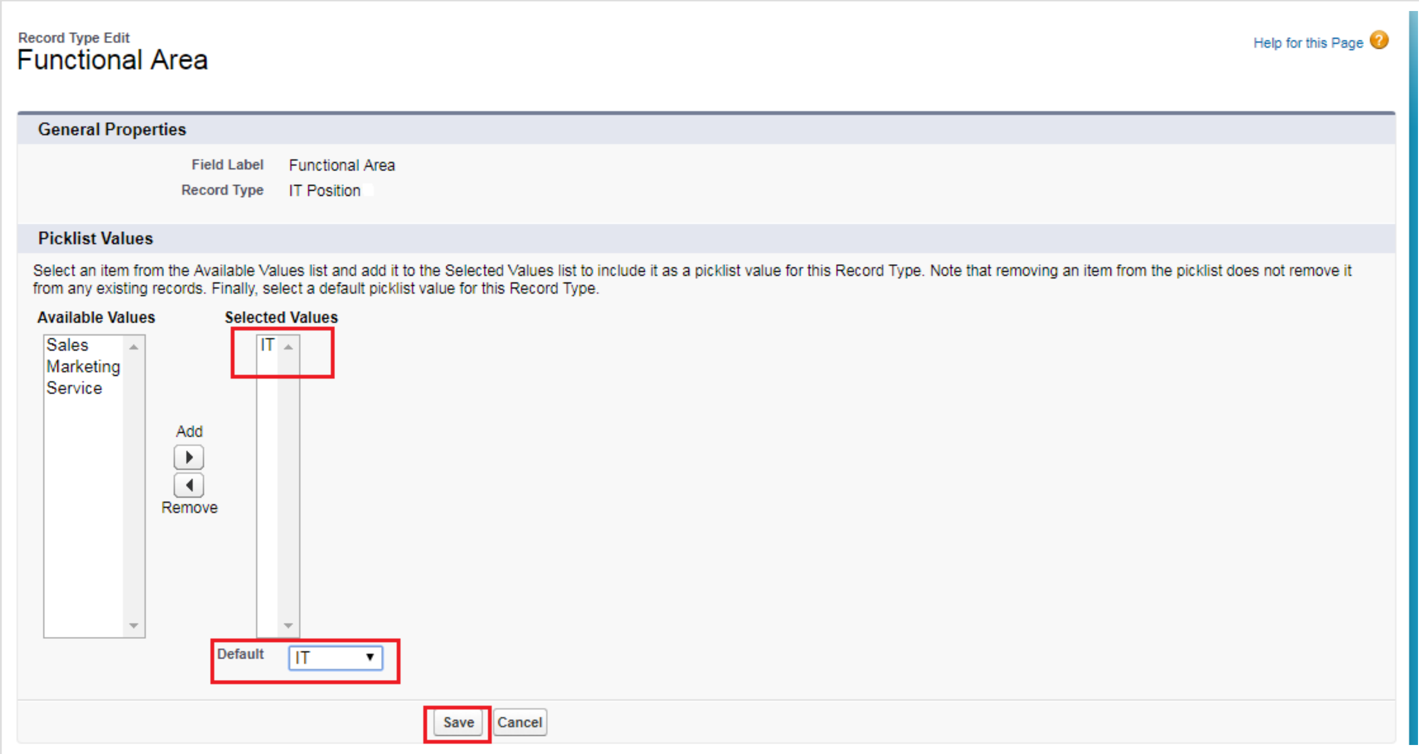


Click on **New** button and fill all **mandatory fields** and select profiles.



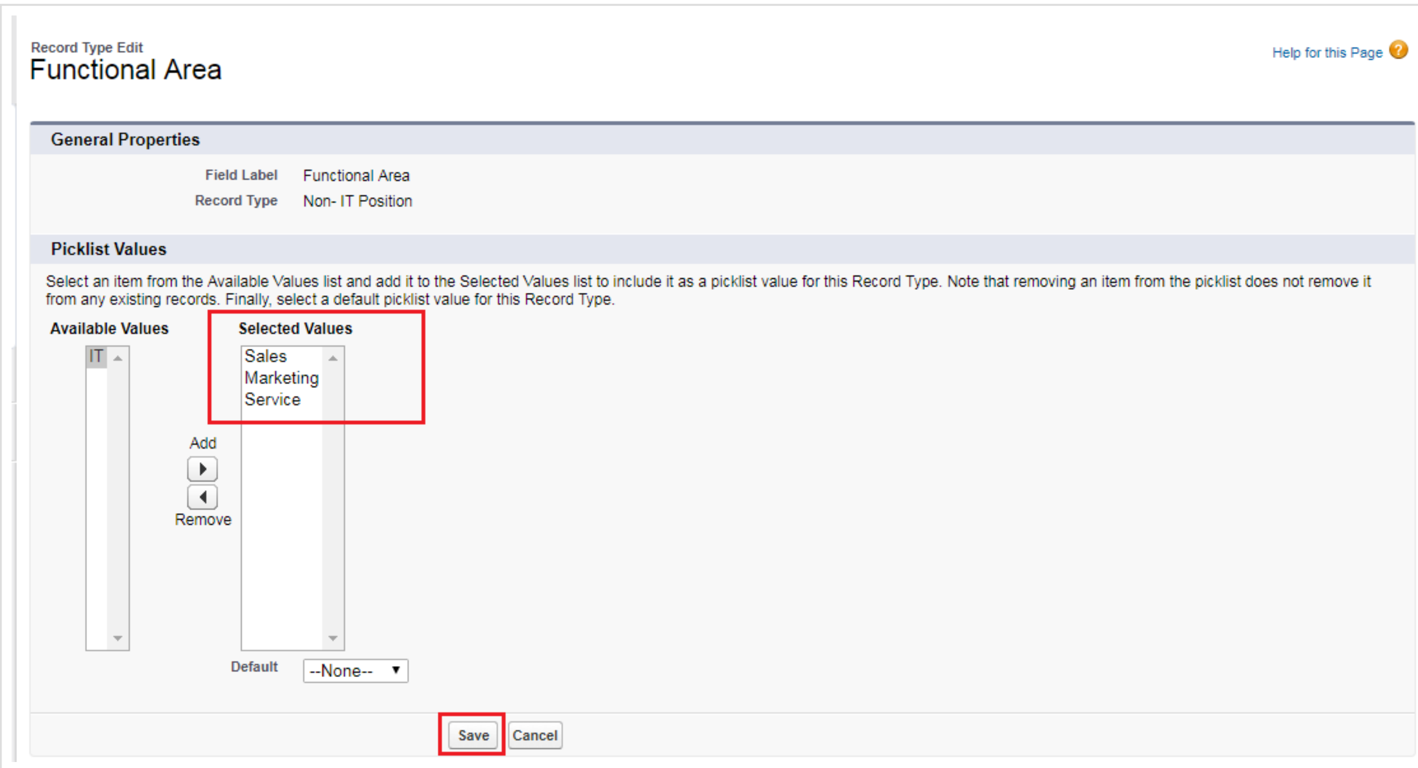
Now Link it to the IT Position Page Layout , and click on **save**.

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:



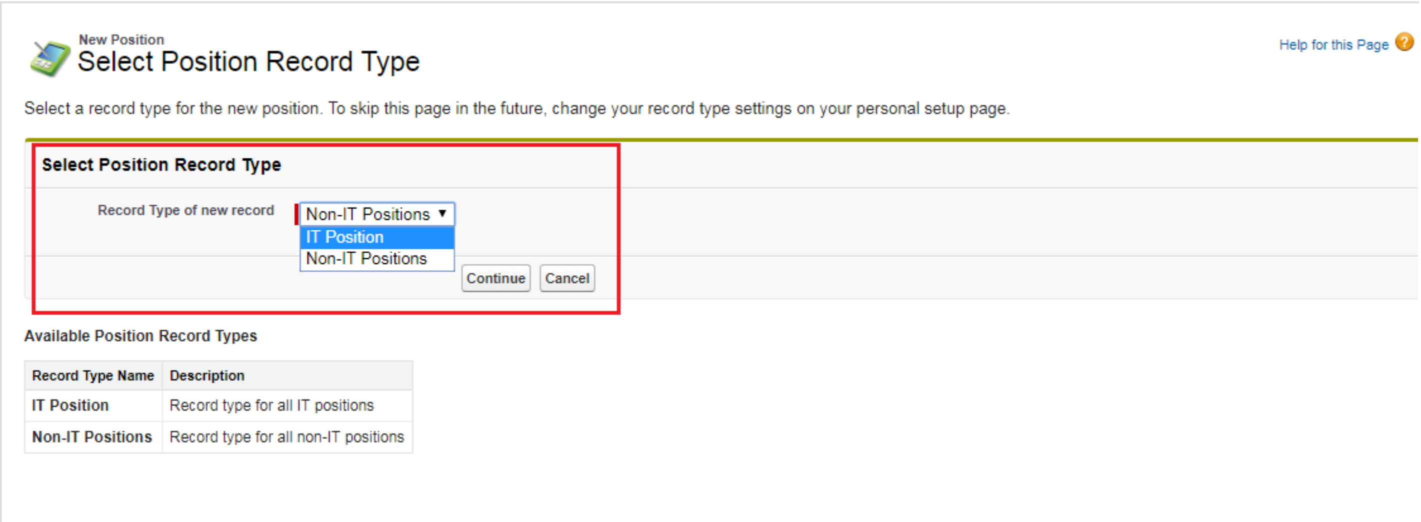
Similar to this create another record type for **Non-IT Positions**. And
Link it to the **Non-IT Position Page Layout** , and click on **save**.

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



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**.



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.