



Salesforce Multiple Record Types Example



Martin Gessner

🕒 April 7, 2015

💬 0 comments

Salesforce Multiple Record Types Example

Creating Multiple Record Types

Creating brand new custom objects in Salesforce, while necessary, can be time consuming and tedious. Often times you will need to create a different page layout or new selections for a particular picklist field but the only way you know how to do this is create an entirely different custom object and customize it as needed. This is where creating multiple record types for one object come in to play, allowing you to customize various aspects of an object based on profile settings.

What are Record Types?

Record types allow administrators to configure different page layouts, business processes, and picklist values. It is important to note that **record types are based on a user’s profile and not standard across the organization**. Record types can be used in a variety of ways, from displaying different page layouts for one object based on a set of criteria, to displaying different picklist values based on the user creating the record in question.

NOTE: Record types do not influence record level security. Meaning, if a user does not have permission to view/edit an object (or field within that object) in their profile settings they will not have the ability to view/edit that object even if a record type is made available to their user profile.

Adding Record Types to Profiles

Profiles can be associated with one or more record types. This can be done when creating the record type, or later when editing a specified profile. When more than one record type is available you must choose a default for each profile. The default record type should be the one which is used most often, and will therefore be the primary selection for users. Profiles associated with only one record type will never be asked to select a record type when creating a record. This will make more sense once we go through the example below.

Setting a Default Record Type

When you have created multiple record types you can set one record type as the default for each user profile. This comes in handy if users tend to use one record type much more often than others. This can be done with the following steps:

Manage Users ->Profiles (select a profile) -> Object Settings (select the object) ->Edit ->Select from the available list of record types

Multiple Record Types Example

Your organization works with two types of clients, corporate and armed services, and therefore sees these as two separate account types. For corporate accounts you will need to capture the size in revenue of the corporation, while for armed forces accounts you will need to capture the branch of armed forces of the account. We therefore need to create two record types for the account object with two different picklist field options for each.

Understanding the Scenario

Because we have two different account types, Corporate and Armed Forces, as well as two different fields we want to capture for each, it makes sense to create two record types and page layouts for each of these account types. We want the appropriate picklist field to be visible only when creating the appropriate account type. As we can see in the table below, visibility of each field is only necessary when creating the account type in association with that field.

		Field Visibility	
		Revenue of Corporation	Branch of Armed Forces
Page Layout	Corporate	✓	
	Armed Forces		✓

Step 1 – Create Page Layouts

1. From the setup screen, click **Customize -> Accounts -> Page Layouts**
2. Click **New**
3. Select an existing page layout to clone, or start from scratch. It is much easier to clone from an existing layout and you can always delete what is not needed from the cloned layout.
4. Select a **Page Layout Name**, for our corporate accounts we will call this **Corporate Account Layout**
5. Click Save
6. Quick Save the page layout as is, there are no changes needed to make on the layout at this time.
7. Repeat steps 1-7 for our armed forces accounts. Naming the layout Armed Forces Account Layout.

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

Account Layout

Page Layout Name

Corporate Account Layout

Save

Cancel

Step 2 – Create Record Types

1. From the Setup screen, click **Customize -> Accounts -> Record Types**
2. Click New
3. Select Master from the Existing Record Type drop-down list to copy all available picklist values.
4. Create a Record Type Label named Corporate Account along with an optional Description if desired.
5. Make sure to select the Active checkbox in order to activate the record type. If this is not selected your new record type will not be available to users.
6. Select Enable for Profile for all profiles since we are not putting restrictions to this page layout based on user profie. The record type must first be enabled for the profile in order to have the option of making it the default selection.
7. Click Next
8. Pick the Corporate Account Layout option and apply to all profiles.
9. Save
10. Repeat steps 1-9, creating a page layout named Armed Forces Account and assigning it to the Armed Forces Account Layout

Account Record Type

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

To use record types, add the Record Type field to your [page layouts](#).

Account Record Type

New

Page Layout Assignment

Action	Record Type Label	Description	Active
Edit Del	Account Record Type		<input checked="" type="checkbox"/>

Existing Record Type

--Master--

Record Type Label

Record Type Name

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 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 type="checkbox"/> Enable for Profile	<input type="checkbox"/> Make Default
1	Account Record Type (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager	Account Record Type (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	Account Record Type (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	Account Record Type (Default)	<input type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus Login User	Account Record Type (Default)	<input type="checkbox"/>	<input type="checkbox"/>

Step 2. Assign page layouts

Account Record Type

Corporate Account

Record Type Name

Corporate_Account

Description

Select the page layout that users with this profile see for records with this record type.

☒ Apply one layout to all profiles

☐ Apply a different layout for each profile

Corporate Account Layout

Profile:

1

Contract Manager

Corporate Account Layout

Cross Org Data Proxy User

Corporate Account Layout

Customer Community Login User

Corporate Account Layout

Step 2. Assign page layouts

Account Record Type

Armed Forces Account

Record Type Name

Armed_Forces_Account

Description

Select the page layout that users with this profile see for records with this record type. After saving, you can change the layout for each profile.

☒ Apply one layout to all profiles

☐ Apply a different layout for each profile

Armed Forces Account Layout

Profile:

1

Contract Manager

Armed Forces Account Layout

Cross Org Data Proxy User

Armed Forces Account Layout

Customer Community Login User

Armed Forces Account Layout

Customer Community Plus Login User

Armed Forces Account Layout

Step 3 – Create Picklist Fields and set Page Layout Visibility

1. Create picklist fields on the account object for **Revenue of Corporation** with picklist values as: <\$100M, \$100M – \$500M, \$500M – \$1B, >\$1B
2. This field can be visible to all profiles since we do not have any restrictions on its user visibility.
3. Only enable the field for the Corporate Account Layout page.
4. Create a picklist field on the account object for Branch of Armed Forces with picklist values as: Army, Navy, Marines, Air Force, Coast Guard
5. This field can be visible to all profiles since we do not have any restrictions on its user visibility.
6. Only enable the field for the Armed Forces Account Layout page.

Field Label

Revenue of Corporation

Enter values for the picklist, with each value separated by a new line.

< \$100M
\$100M - \$500M
\$500M - \$1B
> \$1B

☐ Sort values alphabetically, not in the order entered. Values will be displayed alphabetically everywhere.

☐ Use first value as default value

Field Name

Revenue_of_Corporation

Field Label

Revenue of Corporation

Data Type

Picklist

Field Name

Revenue_of_Corporation

Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of the page. To change the location of this field on the page, you will need to customize the page layout. To change the values that appear in the picklist, click the [picklist values](#) link.

To change the location of this field on the page, you will need to customize the page layout. To change the values that appear in the picklist, click the [picklist values](#) link.

☐ Add Field

	Page Layout Name
<input type="checkbox"/>	Account (Marketing) Layout
<input type="checkbox"/>	Account (Sales) Layout
<input type="checkbox"/>	Account (Support) Layout
<input type="checkbox"/>	Account Layout
<input type="checkbox"/>	Armed Forces Account Layout
<input checked="" type="checkbox"/>	Corporate Account Layout

Field Label

Branch of Armed Forces

Enter values for the picklist, with each value separated by a new line.

Army
Navy
Marines
Air Force
Coast Guard

☐ Sort values alphabetically, not in the order entered. Values will be displayed alphabetically.

☐ Use first value as default value

Field Name

Branch_of_Armed_Forces

Field Label

Branch of Armed Forces

Data Type

Picklist

Field Name

Branch_of_Armed_Forces

Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of the page. To change the location of this field on the page, you will need to customize the page layout. To change the values that appear in the picklist, click the [picklist values](#) link.

To change the location of this field on the page, you will need to customize the page layout. To change the values that appear in the picklist, click the [picklist values](#) link.

☐ Add Field

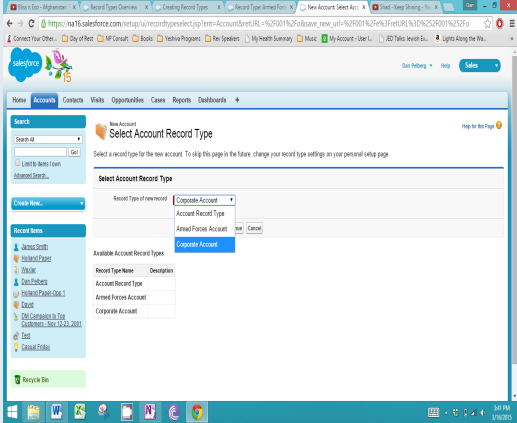
	Page Layout Name
<input type="checkbox"/>	Account (Marketing) Layout
<input type="checkbox"/>	Account (Sales) Layout
<input type="checkbox"/>	Account (Support) Layout
<input type="checkbox"/>	Account Layout
<input checked="" type="checkbox"/>	Armed Forces Account Layout
<input type="checkbox"/>	Corporate Account Layout

NOTE: Make sure the Revenue of Corporation field is not on the Armed Forces Account Layout as it is not necessary for these types of accounts. Additionally, make sure that the Branch of Armed Forces field is not on the Corporate Account Layout for the same reason. Refer to the previous chart in the Understanding the Scenario section for more details.

Step 4 – Test by Creating a New Account

In order to see if we completed all of the steps correctly we must confirm that there are now multiple record types, and the visible fields on each record type correlate to the appropriate page layout.

- Go to **Account -> New**
- The following screen should appear



- Select the **Corporate Account** option from the drop-down menu
- Confirm that the **Revenue of Corporation** picklist field is visible on the page layout, and the **Branch of Armed Forces** field is not visible.

Account Information

Account Owner

Account Name

Parent Account

Account Number

Revenue of Corporation

--None--

Account Site

Type

--None--

Industry

--None--

Sage ID

- Repeat steps 1-4 selecting the **Armed Forces Account** record type and confirming the **Branch of Armed Forces** field is visible on the page layout.

Account Information

Account Owner

Account Name

Parent Account

Account Number

Armed Forces Branch

--None--

Account Site

Type

--None--

Industry

--None--

Sage ID

You have now created two separate records types and page layouts that display the correct fields. Now, whenever you attempt to create a new account you will decide between a Corporate and Armed Forces record type and in turn be routed to the correct page layout.

User Default Record Types

If a user is always using the default record type, it is possible to always use this record type when creating a new record and not be prompted using the ‘**Set Default Record Types**’ option under **My Settings**.

Your Comment...

Comment