**📄 Page Layouts in Salesforce**

A **Page Layout** in Salesforce controls the **organization and appearance** of fields, sections, buttons, related lists, and other elements on a record detail page.

**🎯 Purpose of Page Layouts**

* Control the **layout and visibility** of record details.
* Define **read-only, required, or hidden** fields for users.
* Arrange **sections, buttons, related lists, and custom links** on the record page.
* Provide **different layouts** for different user profiles or record types.
* Customize **record detail pages** without any code.

**🧠 Key Features**

* **One Default Layout per Object:** Every object has at least one page layout by default.
* **Multiple Layouts:** You can create multiple page layouts for a single object.
* **Profile Assignment:** You can assign different page layouts to different profiles (e.g., Sales vs. Support).
* **Record Type Assignment:** Combine record types with specific page layouts to show different views for different business processes.

**⚙️ Page Layout Editor Buttons**

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| **Button** | **Function** |
| **Save** | Saves changes and returns to the Page Layout list page. |
| **Quick Save** | Saves changes but remains on the same page. |
| **Save As** | Clones the existing layout to create a new one. |
| **Layout Properties** | Edits layout name and layout-level settings. |

**Mini Page Layouts**

A **Mini Page Layout** contains a **subset of fields and related lists** from an existing page layout.

* It controls what details users see when they **hover over a record link in Recent Items, Lookups, or Related Lists.**
* Each **page layout** has its own **mini page layout**.
* The fields displayed are determined by the mini page layout configuration.
* Useful for giving quick record insight without opening the full record page.

**Compact Layouts**

**Compact Layouts** define the set of **key fields displayed in the Highlights Panel** at the top of a record page and in the **Salesforce mobile app**.

* Display up to **10 fields** (including the record name).
* Used to show key information at a glance—no need to scroll through the full page.
* Support all field types **except**:(Text Area, Long Text Area, Rich Text Area, Multi-Select Picklist)
* You can create multiple compact layouts per object, but only **one can be assigned as the primary layout** through a **Compact Layout Assignment**.

**Salesforce1 App**

**Salesforce1** is the **mobile app** for business users to access and manage their Salesforce data from anywhere.

* **Changes in Salesforce setup** (like new fields or layouts) appear in the app **only after logging out and logging in again**.
* Supports **Compact Layouts** for quick data viewing on mobile.

**SalesforceA App**

**SalesforceA** is a **mobile app designed for administrators** to manage users on the go.

Allows admins to perform quick actions like:

* Resetting passwords
* Freezing or deactivating users
* Viewing org details

**List Views**

**List Views** allow users to create and view filtered lists of records for a specific object (like Accounts, Contacts, or Opportunities).

* Found on each object’s **tab**.
* Can filter records based on field values (e.g., “Opportunities closing this month”).
* Can be **user-specific** (private) or **shared** (organization-wide or by role/group).
* You can add **inline editing**, **charts**, and **Kanban views** for visual analysis.
* Users with appropriate permissions can create or edit list views.

**⚡ Salesforce Actions — Overview**

Actions add functionality to Salesforce and **enable users to perform quick operations** like creating, updating, or logging information directly from record pages or the Salesforce mobile app.

**Types of Actions in Salesforce**

Salesforce provides two main types of actions:

**1️⃣ Object-Specific Actions**

Perform actions **in the context of a specific record or object**

**Available On:** Record detail pages, Related lists

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| **Type** | **Description** |
| **Create Record** | Creates a new record **automatically associated** with the current record (e.g., new Contact linked to an Account). |
| **Update Record** | Updates fields on the current record. You can define which fields are available to edit. |
| **Log a Call** | Let’s users add notes about a call, meeting, or interaction tied to the record. |
| **Custom Action** | Based on **Visualforce Page** or **Canvas App** that allows custom logic or UI. Must use the **standard controller** for the relevant object. |
| **Send Email** | Available only for **Cases**. Provides a simplified email interface for case management. |

**Note:**

Once an action is created, its **Action Type cannot be changed.**

**2️⃣ Global Actions**

Perform actions **independent of any particular record** — can be accessed from multiple pages like **Home**, **Chatter**, or **Global Publisher**.

**Available On:** Home Page, Chatter Tab, Record Pages, Global Publisher Layout

**Common Use Cases:**

* Create a new record (not tied to an existing record)
* Log a call
* Send an email
* Create a task

**Action Layouts**

Action layouts define the **fields and structure** displayed when performing an action — similar to how page layouts control record detail pages.

When you create an action, Salesforce auto-populates the layout with:

* Target object default fields
* Standard required fields
* Universally required custom fields
* You can **add, remove, or reorder** fields.
* Action layouts are available for both **object-specific** and **global** actions.

**Global Publisher Layouts**

Global Publisher Layouts determine which **global actions** appear in Salesforce interfaces.

**Usage in Different Interfaces:**

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| **Interface** | **Function** |
| **Salesforce Classic** | Defines the actions visible in the **Chatter Publisher** on global pages (e.g., Home, Chatter tab). |
| **Salesforce1 / Mobile** | Determines which actions appear in the **action bar** on Feed and People pages. |

Used to manage **visibility and accessibility** of key actions for mobile and desktop users.

**🔍 Search Layouts**

Search Layouts determine which **fields and buttons** are displayed to users in various search-related contexts such as:

* Search results
* Lookup dialogs
* Recent items list
* Related lists
* They help **improve data visibility and user experience** when finding or relating records.
* Admins can customize search layouts to display **additional fields** (e.g., Phone, Email, Account Type) for better record identification.

**🧩 Components of Search Layouts**

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| **Layout Type** | **Description** |
| **1. Search Results** | Fields displayed when users search for a record from the global search or sidebar search. |
| **2. Lookup Dialogs** | Fields shown when selecting a record from a lookup field while editing another record. |
| **3. Lookup Phone Dialogs** | Similar to lookup dialogs, but specific to phone-type fields (used in Salesforce Call Center). |
| **4. Object Tab (Recent Records)** | Fields displayed in the “Recent Records” section on an object’s tab home page. |
| **5. Object List View Buttons** | Used to define which **buttons** (e.g., New, Edit, Delete) appear in the object’s list view page. |
| **6. Search Filter Fields** | Fields that can be used as **filters** to narrow search results. |

**⚠️ Limitations**

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| **Limitation** | **Description** |
| **Non-searchable fields** | Encrypted, Formula, Lookup, and Roll-Up Summary fields **cannot** be searched. |
| **Manual customization** | Each object’s layout must be customized separately. |
| **Dependent on permissions** | Users can only see fields they have access to through Field-Level Security (FLS). |

**🧾 Record Types**

**Record Types** allow organizations to **categorize records** within the same object, showing **different page layouts, picklist values, and business processes** based on user profiles.

**🧩 Key Features**

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| **Feature** | **Description** |
| **Customized Experience** | Different users can see different fields or options on the same object. |
| **Profile Association** | Record types are assigned to **profiles** to control who can create which type of record. |
| **Business Process Support** | Used to implement **multiple business processes** (e.g., Sales Stages for Opportunities, Status for Cases). |
| **Default Record Type** | Each profile can have a **default record type** for quicker record creation. |

**⚠️ Limitations**

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| **Limitation** | **Description** |
| **Maximum Record Types** | You can create up to **200 record types per object**. |
| **Cannot Control Non-Picklist Fields** | Only picklist values can be controlled; other field types are not affected by record types. |