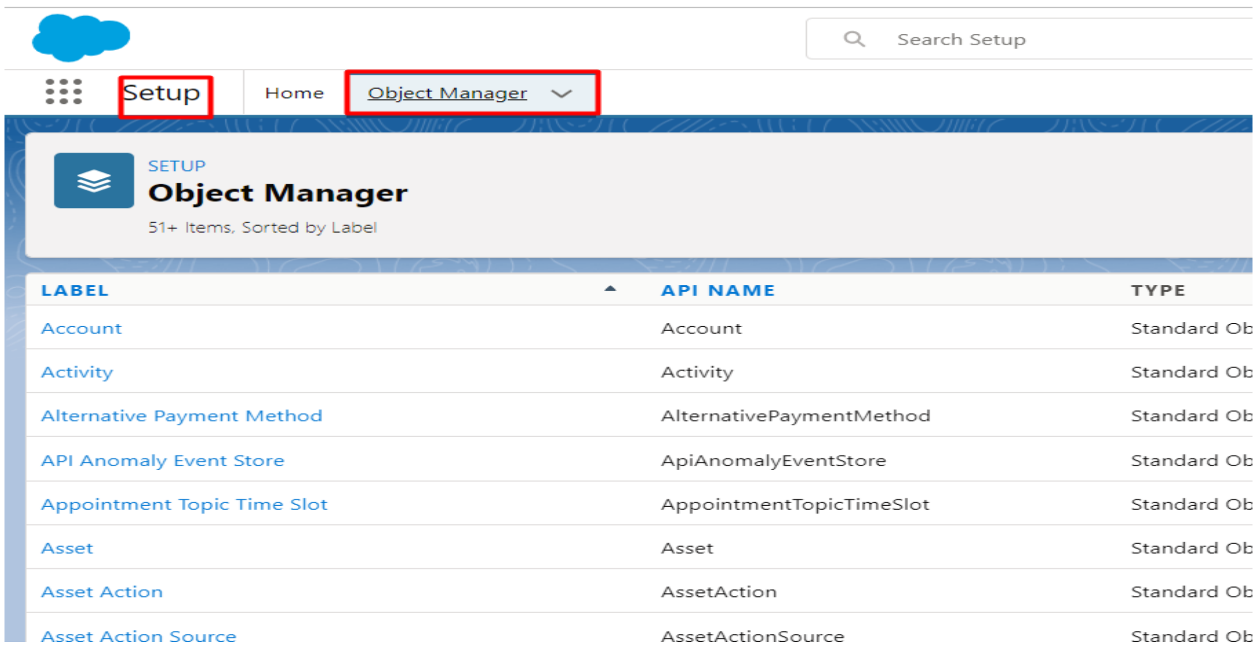
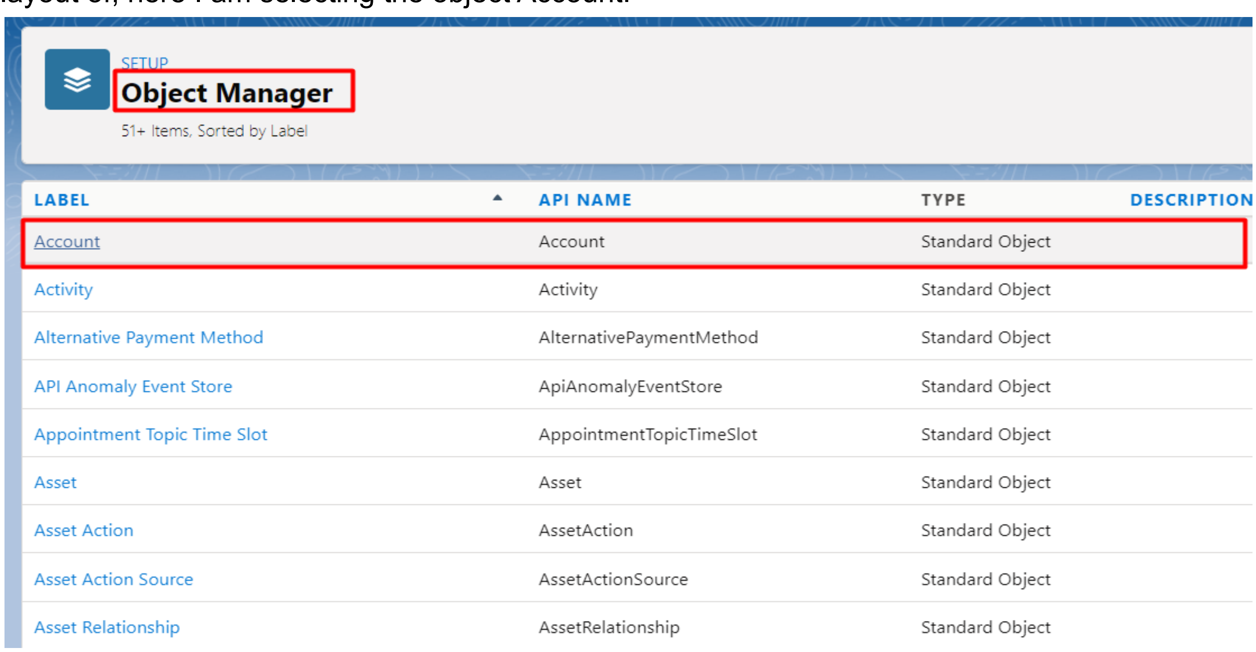
Lecture 1: Configure Page layout.

Page layout plays an important role in salesforce so whenever you use any standard or custom and if you open any records and go to details so whatever fields you see those are because of page layout.Page layout basically allows you to decide where you want to put your fields and how many sections you want.

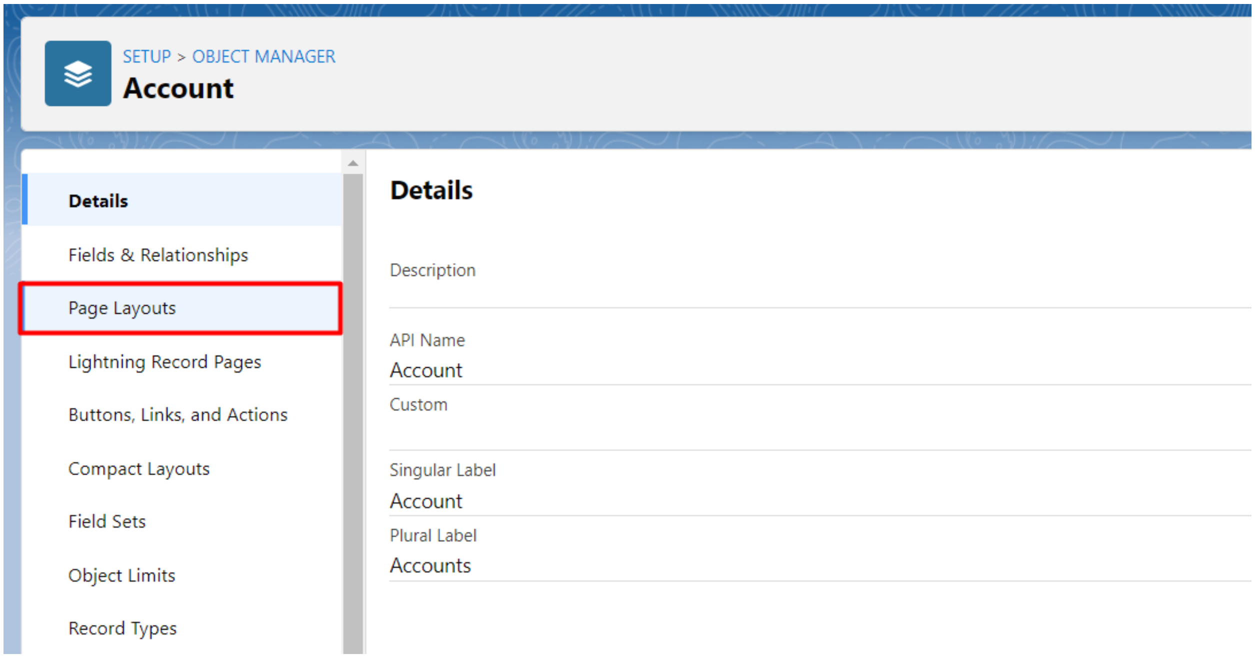
Step 1: First step in order to configure page layout is to open setup and click on object manager.



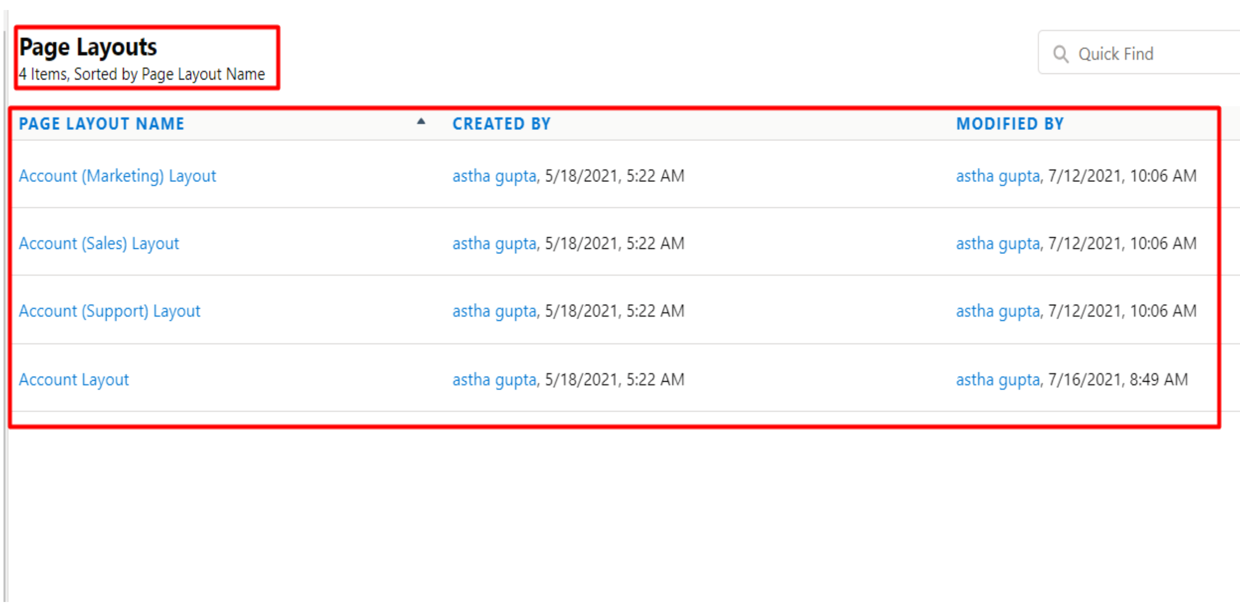
Step 2: After opening the object manager click on any object that you want to manage page layout of, here I am selecting the object Account.



Step 3: As you click on the object you will be directed to the next page where you will see an option available as page layout on the left side of the screen click on that option.



Step 4: As you click on page layout on the next page you will see all the page layouts available for this object are listed.



Step 5: If you wish to see for which profiles which page layouts are used, you can click on page layout assignment. As you open this page you will see that all the profiles and layouts are listed. Right now My users profile is “System administrator” and as you scroll down you will see that System Administrator is using “Account layout”.

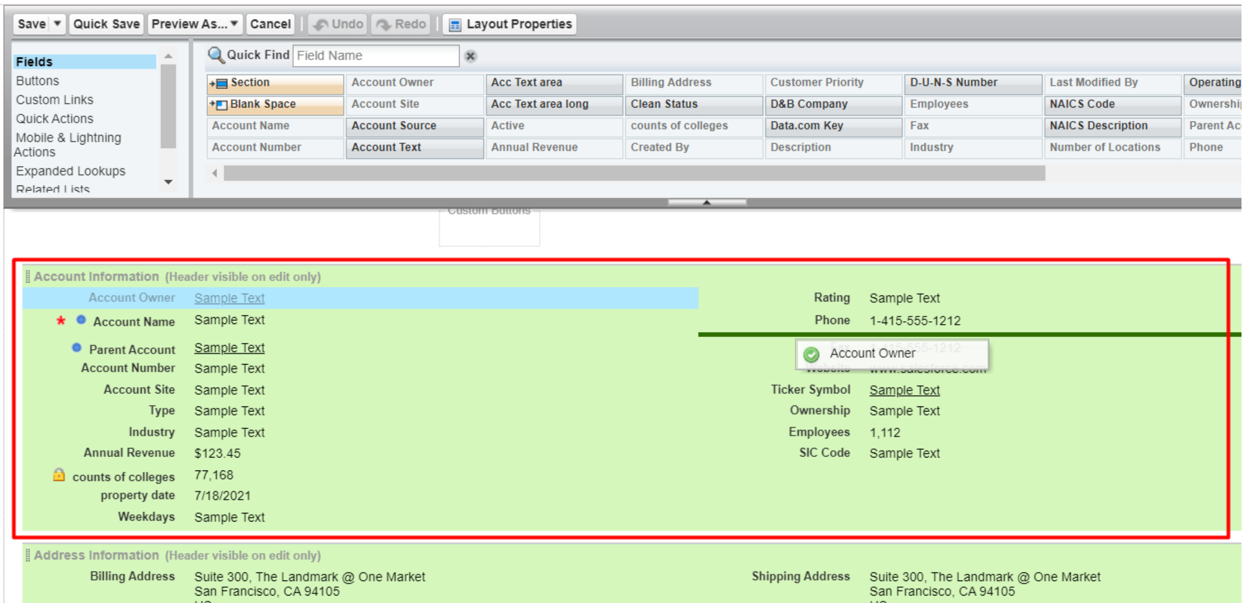
Profiles	Page Layout
Customer Community Plus Login User	Account Layout
Customer Community Plus User	Account Layout
Customer Community User	Account Layout
Customer Portal Manager Custom	Account Layout
Customer Portal Manager Standard	Account Layout
External Apps Login User	Account Layout
External Identity User	Account Layout
Force.com - App Subscription User	Account Layout
Force.com - Free User	Account Layout
Gold Partner User	Account Layout
High Volume Customer Portal	Account Layout
High Volume Customer Portal User	Account Layout
Identity User	Account Layout
Marketing User	Account Layout
Minimum Access - Salesforce	Not Assigned
Partner App Subscription User	Account Layout
Partner Community Login User	Account Layout
Partner Community User	Account Layout
Read Only	Account Layout
Silver Partner User	Account Layout
Solution Manager	Account Layout
Standard Platform User	Account Layout
Standard User	Account Layout
System Administrator	Account Layout
Work.com Only User	Account Layout

Step 6: Now we know that the system administrator is using an account object so I need to open the account page layout available on the page layout option .

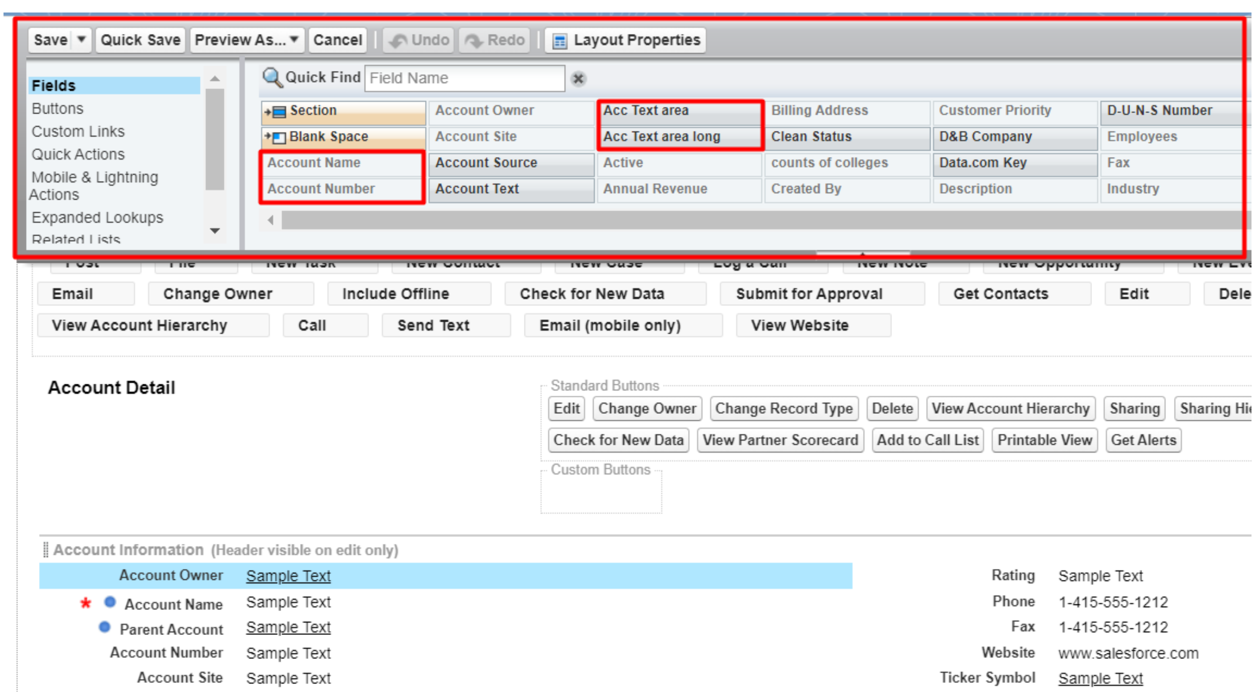
Page Layouts
4 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account (Marketing) Layout	astha gupta, 5/18/2021, 5:22 AM	astha gupta, 7/12/2
Account (Sales) Layout	astha gupta, 5/18/2021, 5:22 AM	astha gupta, 7/12/2
Account (Support) Layout	astha gupta, 5/18/2021, 5:22 AM	astha gupta, 7/12/2
Account Layout	astha gupta, 5/18/2021, 5:22 AM	astha gupta, 7/16/2

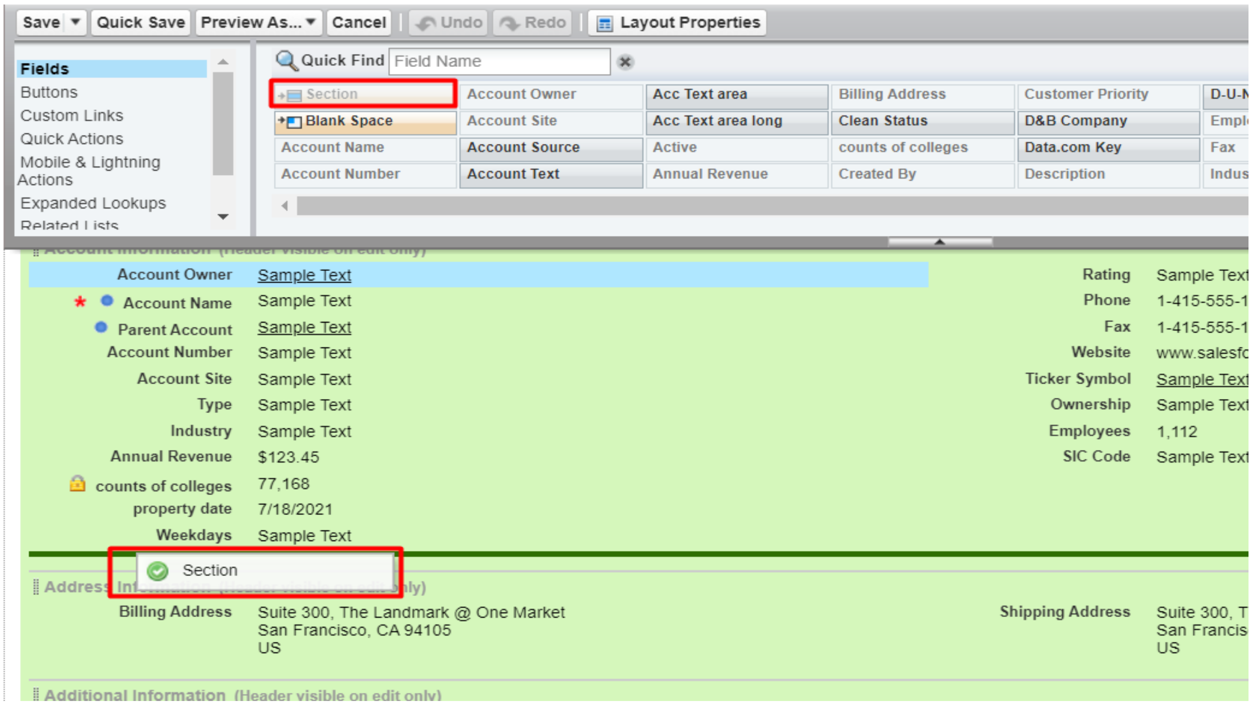
Step 7: As you open the account layout on the next page you will see all the fields available that we can configure.So if you scroll down and you want to change the location of any field you just have to drag and drop the fields where you want to relocate.



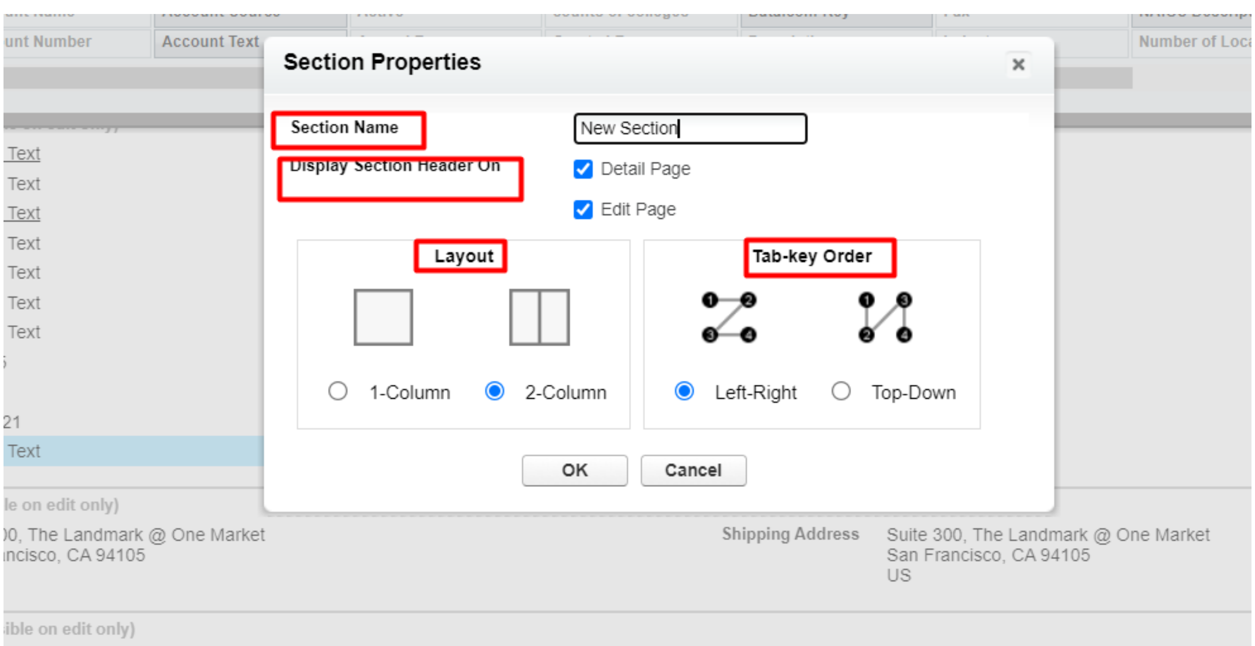
Step 8: Now if you want to add any new field that is not already present so on top of the page you can see all the fields are listed, here the fields that we are unable to select are already available on page layout and the fields that are not available are selectable so you can just click and drag and drop them on the page layout.



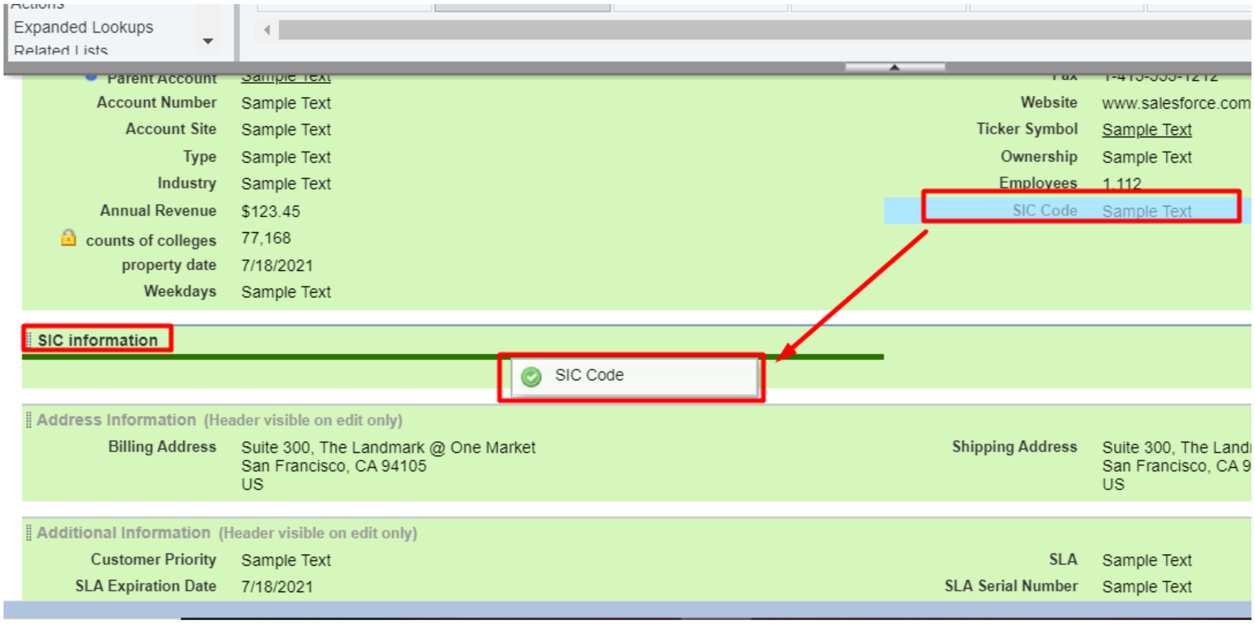
Step 9: Now if you want to create any section so again on the top of the screen you will see an option for section you can just click, drag and drop the section on the page layout where you want it to bne palace.



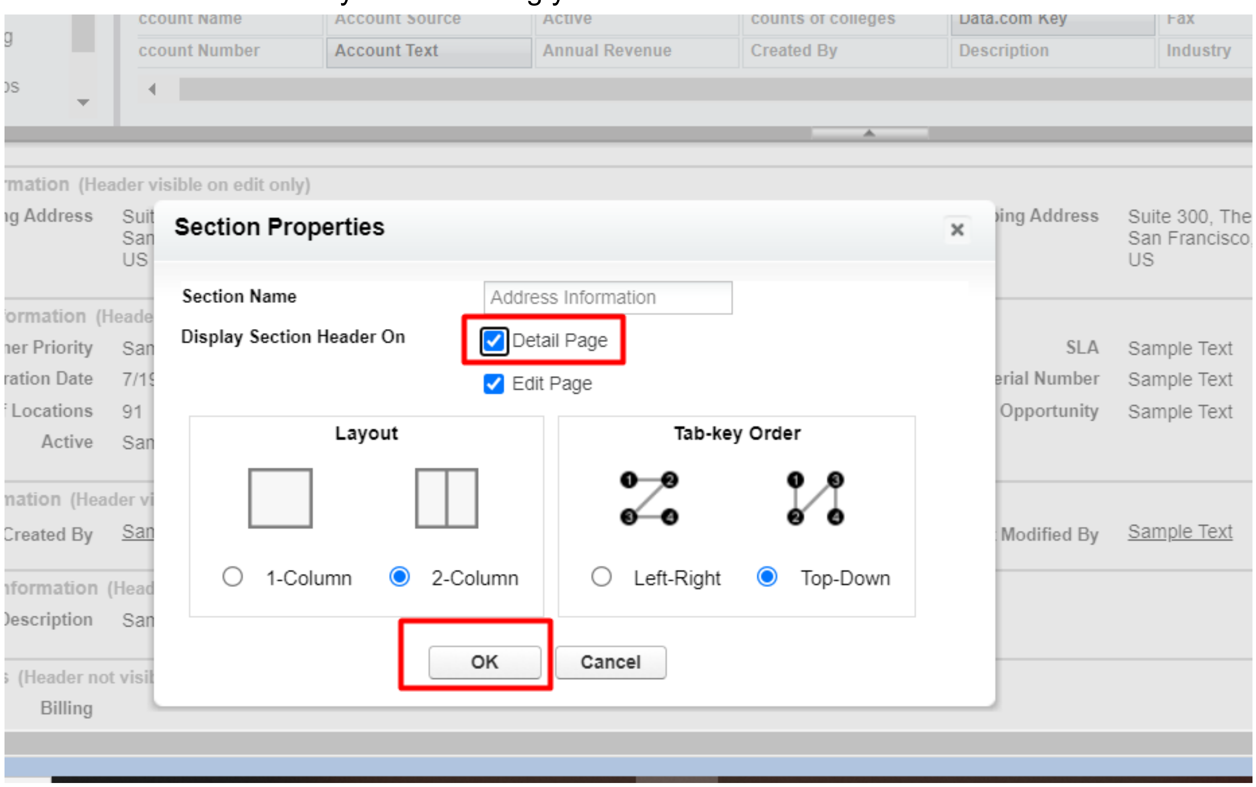
Step 10: Now as you drop the section you will see a pop up as section properties with section name, display section header on, layout and tab key order information to be filled.



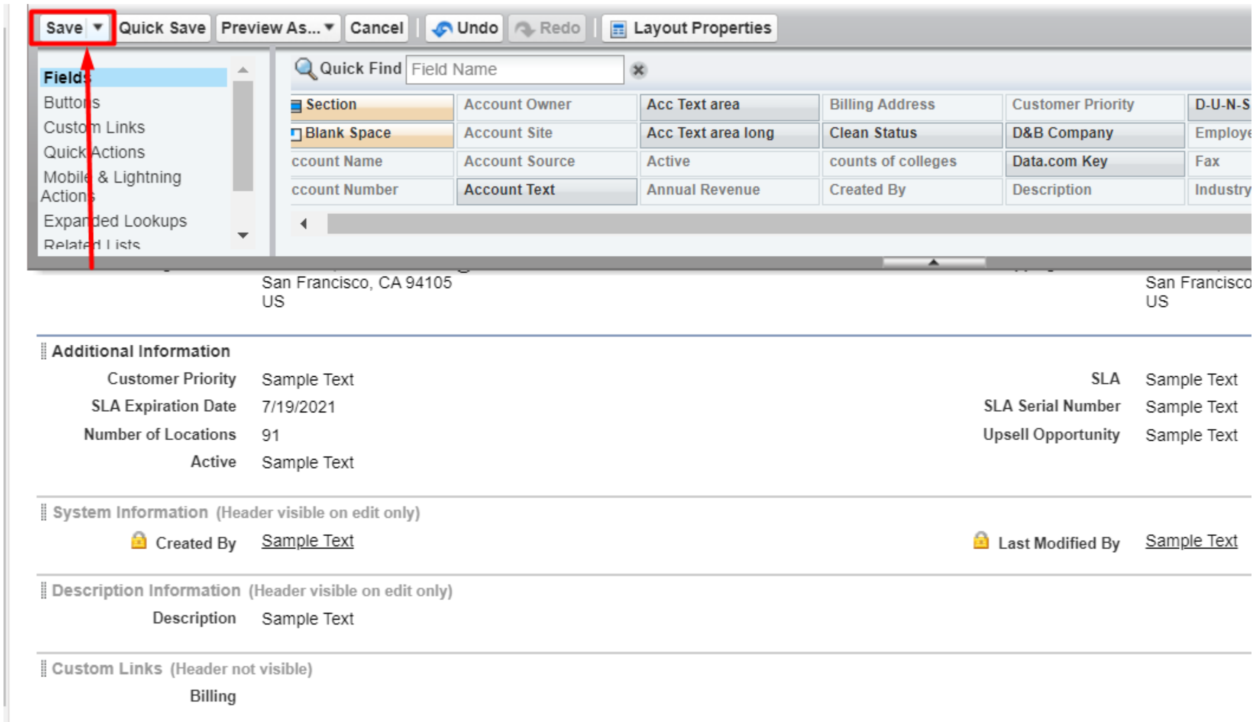
Step 11: Here I am putting the section name as SIC information and and as you click on ok you will see that the section is created and now i am moving SIC code under the section SIC Information.



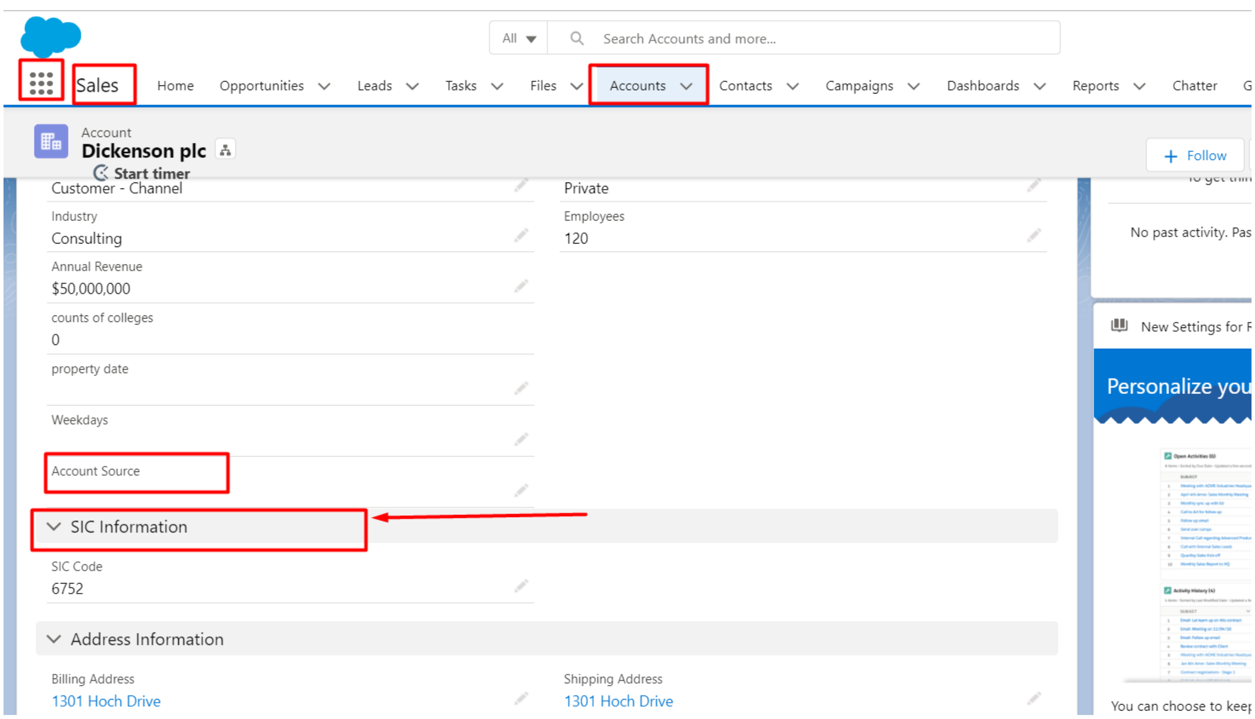
Step 12: One more thing to notice is that the address information section is “header visible edit only”, if you want to change it you can click on the wrench icon and click enable detail only so now it will be visible while you are viewing your account.



Step 13: If you now move to account object's detail option you will not find the changes that we made but now as we click on save it will be visible.



Step 14: Moving on to app launcher and opening sales clicking on account and opening details you will see that the changes that we made are visible with the section that we created.



Step 15: Now if in any case you want to make a field required so you have to click on the wrench icon to open field properties and enable required after enabling click on save and that particular field will be an required field once you save.