

## Lecture 2: Configure compact layout.

**Step 1:** The small section available above the detail option is called compact layout.

The screenshot shows the Salesforce Account page for 'Dickenson plc'. The compact layout section, highlighted with a red box, contains the following information:

Type	Phone	Website	Account Owner	Account Site	Industry
Customer - Channel	(785) 241-6200	dickenson-consulting.com	astha gupta		Consulting

Below the compact layout, the 'Details' tab is selected, showing a list of account fields and their values, such as Account Name (Dickenson plc), Account Number (CC634267), and Type (Customer - Channel).

**Step 2:** So in order to configure Compact layout you have to go to object manager open an object and click to open. As you open you will see an option available as compact layout on the left hand side of the page.

The screenshot shows the Salesforce Setup page. The 'Object Manager' link in the top navigation bar is highlighted with a red box. Below it, the 'Compact Layouts' section is highlighted with a red box. The 'Compact Layouts' section shows a list of compact layouts for the 'Account' object, with the 'System Default' layout selected.

LABEL	API NAME	PRIMARY
System Default	SYSTEM	✓

**Step 3:** As you click on the compact layout option on the next page you will see an option available as system default. Click on it to open and select clone.

Account Compact Layout

**System Default**  
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Clone Compact Layout Assignment

Label	System Default	Object Name	Account
API Name	SYSTEM		
Included Fields	Account Name Type Phone Website Account Owner Account Site Industry Billing Address Parent Account Annual Revenue		

Clone Compact Layout Assignment

**Step 4:** when you click on clone you will be directed to the next page compact layout edit where you will have to fill up information like label, name and select field.

Compact Layout Edit

Save Cancel

Enter Compact Layout Information

Label Account Compact Layout

Name Account\_Compact\_Layout ⓘ

Select Compact Layout Fields

Available Fields

Add

Remove

Account Number  
Account Source  
Account Text  
Active  
Clean Status  
counts of colleges  
Created By  
Customer Priority  
D&B Company  
Data.com Key

Selected Fields

Account Name  
Type  
Phone  
Website  
Account Owner  
Account Site  
Industry  
Billing Address  
Parent Account  
Annual Revenue

Top

Up

Down

Bottom

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

Save Cancel

**Step 5:** I am putting label as Account Compact Layout , name will be generated by default. Moving on I am removing a few fields and clicking on next.

### New Compact Layout

Compact layouts are used in the mobile app and some Chatter feed items to display a record's key fields at a glance. You can select and prioritize up to ten fields for the layout. The fields may vary based on the device's screen, which record page is being viewed, and the permissions of the user.

**Compact Layout Edit** [Save] [Cancel]

**Enter Compact Layout Information**

Label: Account Compact Layout

Name: Account\_Compact\_Layout [i]

**Select Compact Layout Fields**

**Available Fields**

- SIC Description
- SLA
- SLA Expiration Date
- SLA Serial Number
- Ticker Symbol
- Tradestyle
- Upsell Opportunity
- Weekdays
- Year Started
- Account Site

**Selected Fields**

- Account Name
- Type
- Phone
- Website
- Account Owner

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

[Save] [Cancel]

**Step 6:** When you click on save you will be directed to the next page where you will see an option of compact layout assignment.

Account Compact Layout

## Account Compact Layout

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**Compact Layout Detail** [Edit] [Clone] [Delete] **Compact Layout Assignment**

Label	Account Compact Layout	Object
API Name	Account_compact_layout	
Included Fields	Account Name Type Phone Website Account Owner	
Created By	astha gupta, 7/19/2021, 9:27 AM	Modified By

[Edit] [Clone] [Delete] Compact Layout Assignment

**Step 7:** Moving ahead on the next page you will see an option of edit assignment, click on it and select account compact layout.

Account Compact Layouts

### Compact Layout Assignment

Save

Cancel

**Primary Compact Layout**

Select the compact layout to use when this object's records appear as list items in the mobile app.

**Primary Compact Layout:**

System Default

System Default

Account Compact Layout

Save

Cancel

**Step 8:** Now moving to app launcher and selecting sales on the account object's detail layout you will see that the changes that we have made are applied.