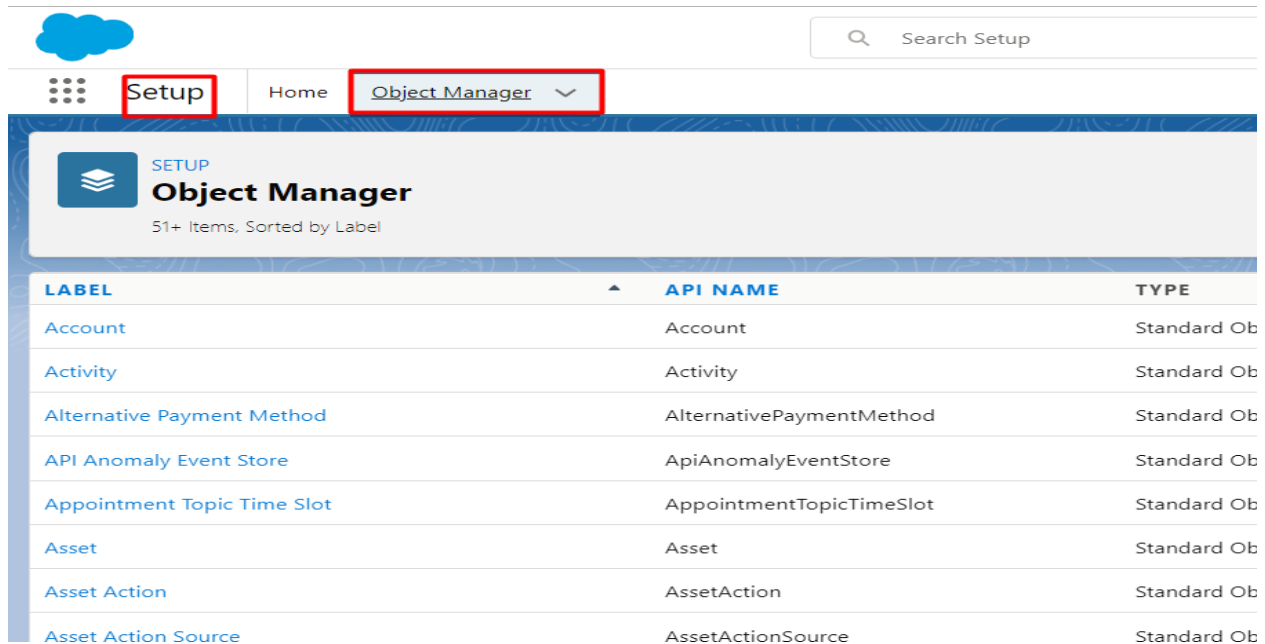


Lecture 1: Configure Page layout.

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.

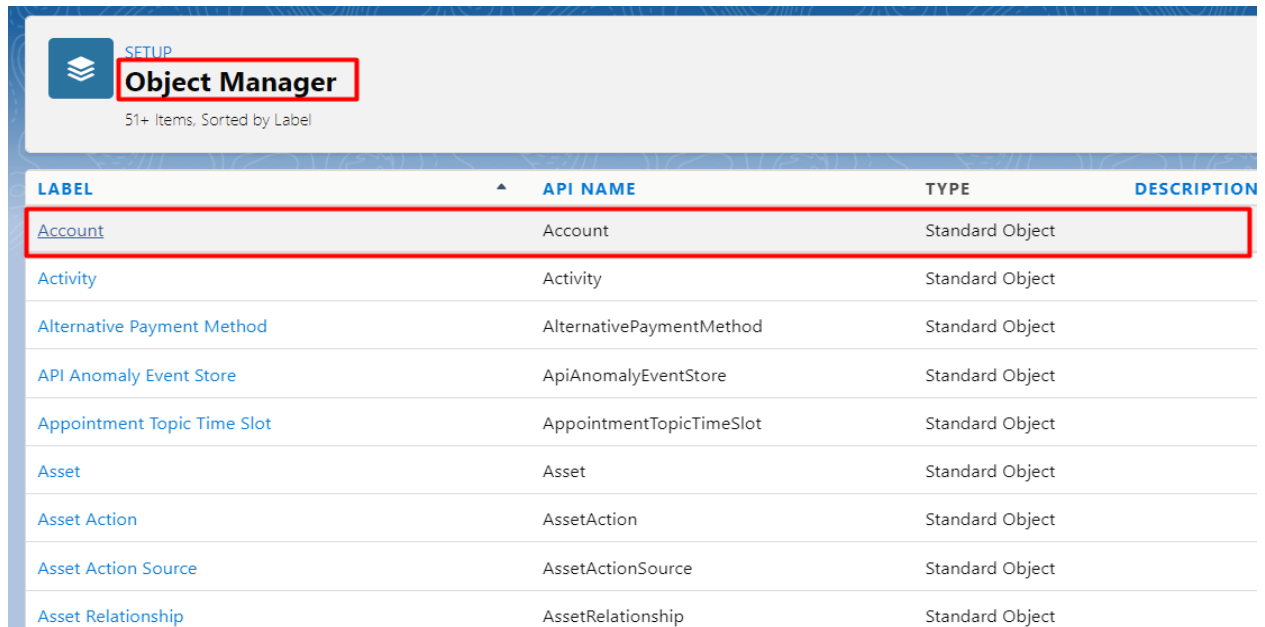
Step 1: First step in order to configure page layout is to open setup and click on object manager.



The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below it, the navigation bar includes "Setup" (highlighted with a red box), "Home", and "Object Manager" (also highlighted with a red box). The main content area is titled "SETUP Object Manager" with a subtitle "51+ Items, Sorted by Label". Below this is a table listing various objects.

LABEL	API NAME	TYPE
Account	Account	Standard Ob
Activity	Activity	Standard Ob
Alternative Payment Method	AlternativePaymentMethod	Standard Ob
API Anomaly Event Store	ApiAnomalyEventStore	Standard Ob
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Ob
Asset	Asset	Standard Ob
Asset Action	AssetAction	Standard Ob
Asset Action Source	AssetActionSource	Standard Ob

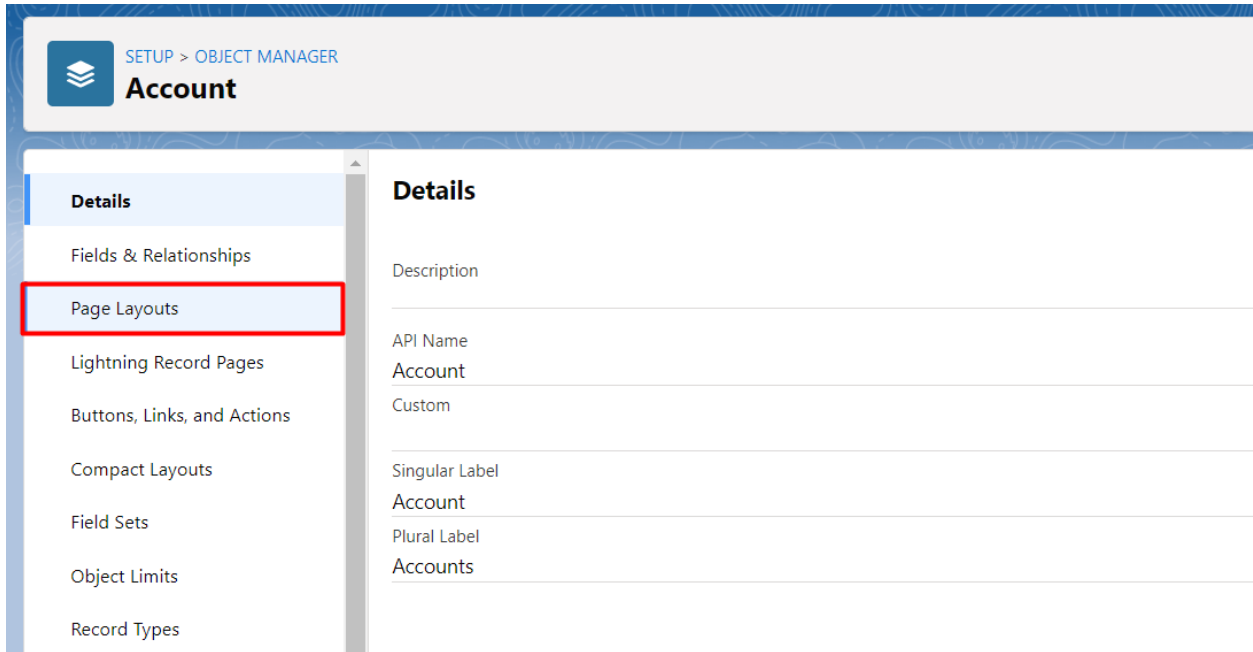
Step 2: After opening the object manager click on any object that you want to manage page layout of, here I am selecting the object Account.



The screenshot shows the Salesforce Object Manager page for the "Account" object. The "Object Manager" title is highlighted with a red box. Below it, the subtitle "51+ Items, Sorted by Label" is visible. The table lists various objects, and the "Account" row is highlighted with a red box.

LABEL	API NAME	TYPE	DESCRIPTION
Account	Account	Standard Object	
Activity	Activity	Standard Object	
Alternative Payment Method	AlternativePaymentMethod	Standard Object	
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object	
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object	
Asset	Asset	Standard Object	
Asset Action	AssetAction	Standard Object	
Asset Action Source	AssetActionSource	Standard Object	
Asset Relationship	AssetRelationship	Standard Object	

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.



SETUP > OBJECT MANAGER

Account

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types

Details

Description

API Name
Account

Custom

Singular Label
Account

Plural Label
Accounts

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.

Page Layouts			Quick Find
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, 7/12/2021, 10:06 AM	
Account (Sales) Layout	astha gupta, 5/18/2021, 5:22 AM	astha gupta, 7/12/2021, 10:06 AM	
Account (Support) Layout	astha gupta, 5/18/2021, 5:22 AM	astha gupta, 7/12/2021, 10:06 AM	
Account Layout	astha gupta, 5/18/2021, 5:22 AM	astha gupta, 7/16/2021, 8:49 AM	

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

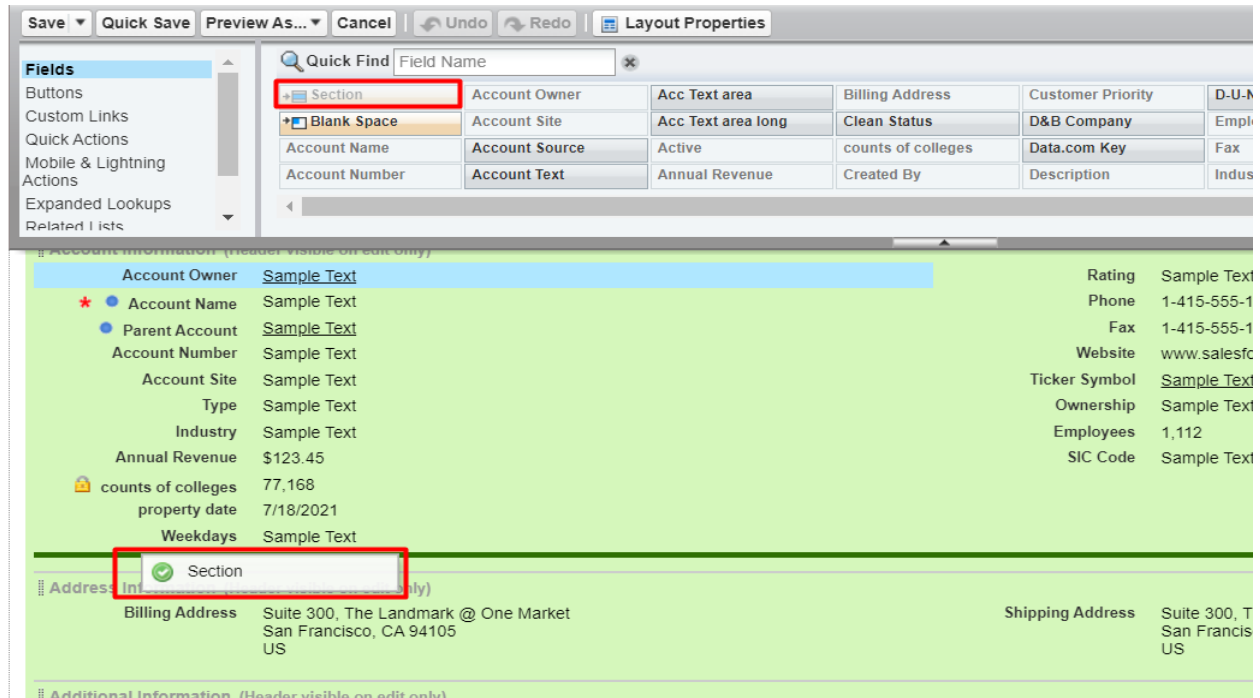
Step 7: As you open the account layout on the next page you will see all the fields available that we can configure. So if you scroll down and you want to change the location of any field you just have to drag and drop the fields where you want to relocate.

The screenshot shows the Salesforce Account layout editor. The top bar includes 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. The 'Fields' palette on the left lists various field types: Buttons, Custom Links, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, and Related Lists. The main area displays a table of available fields with columns: Section, Account Owner, Account Site, Account Source, Account Number, Account Text, Acc Text area, Acc Text area long, Active, Annual Revenue, Billing Address, Clean Status, counts of colleges, Created By, Customer Priority, D&B Company, Data.com Key, Description, D-U-N-S Number, Employees, Fax, Industry, Last Modified By, NAICS Code, NAICS Description, Number of Locations, Operating, Ownership, Parent Account, Phone, Rating, Sample Text, Ticker Symbol, and Website. Below the table, the 'Account Information' section is visible, containing fields like Account Owner, Account Name, Parent Account, Account Number, Account Site, Type, Industry, Annual Revenue, counts of colleges, property date, and Weekdays. The 'Address Information' section is also visible, containing Billing Address and Shipping Address.

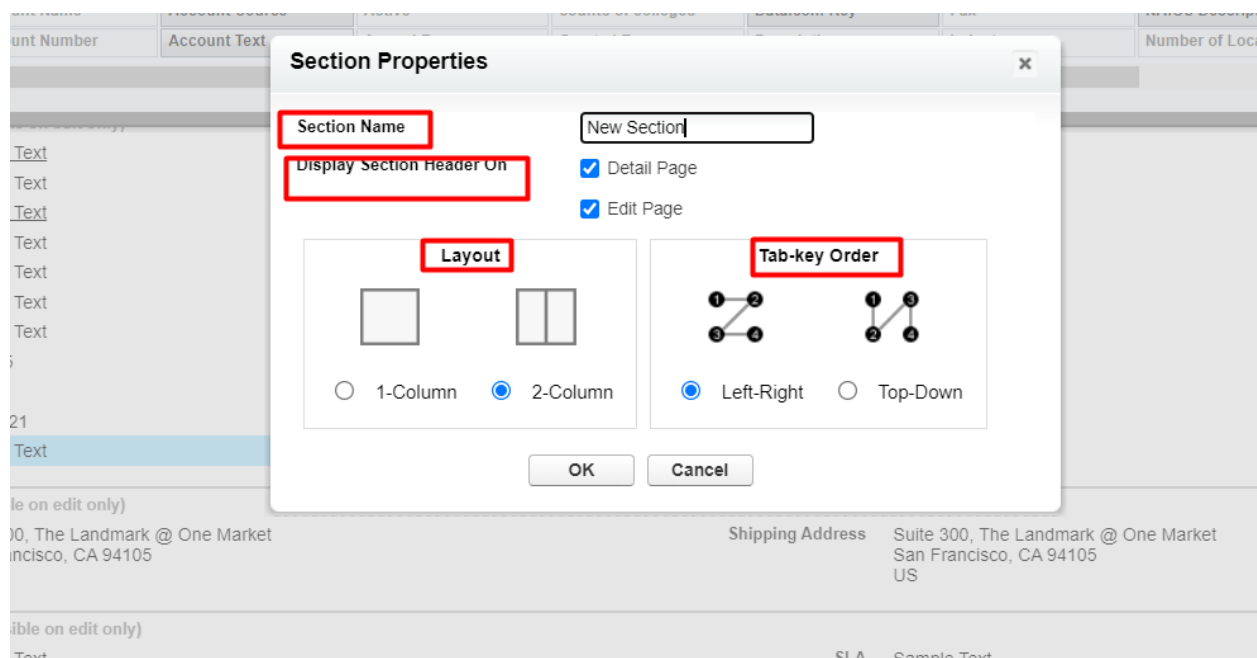
Step 8: Now if you want to add any new field that is not already present so on top of the page you can see all the fields are listed, here the fields that we are unable to select are already available on page layout and the fields that are not available are selectable so you can just click and drag and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

The screenshot shows the Salesforce Account layout editor. The top bar includes 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. The 'Fields' palette on the left lists various field types: Buttons, Custom Links, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, and Related Lists. The main area displays a table of available fields with columns: Section, Account Owner, Account Site, Account Source, Account Number, Account Text, Acc Text area, Acc Text area long, Active, Annual Revenue, Billing Address, Clean Status, counts of colleges, Created By, Customer Priority, D&B Company, Data.com Key, Description, D-U-N-S Number, Employees, Fax, Industry, Last Modified By, NAICS Code, NAICS Description, Number of Locations, Operating, Ownership, Parent Account, Phone, Rating, Sample Text, Ticker Symbol, and Website. Below the table, the 'Account Information' section is visible, containing fields like Account Owner, Account Name, Parent Account, Account Number, Account Site, Type, Industry, Annual Revenue, counts of colleges, property date, and Weekdays. The 'Address Information' section is also visible, containing Billing Address and Shipping Address. A red box highlights the 'Fields' palette and the table of available fields.

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 be placed.



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 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.

The screenshot shows a Salesforce account page. The 'SIC information' section is highlighted with a red box. Below it, the 'SIC Code' field is highlighted with a red box. A red arrow points from the 'SIC Code' field in the 'SIC information' section to the 'SIC Code' field in the 'SIC information' section below.

Parent Account	Sample Text	Website	www.salesforce.com
Account Number	Sample Text	Ticker Symbol	Sample Text
Account Site	Sample Text	Ownership	Sample Text
Type	Sample Text	Employees	1,112
Industry	Sample Text	SIC Code	Sample Text
Annual Revenue	\$123.45		
counts of colleges	77,168		
property date	7/18/2021		
Weekdays	Sample Text		

SIC information

☒ SIC Code

Address Information (Header visible on edit only)

Billing Address Suite 300, The Landmark @ One Market
San Francisco, CA 94105
US

Shipping Address Suite 300, The Landmark @ One Market
San Francisco, CA 94105
US

Additional Information (Header visible on edit only)

Customer Priority Sample Text

SLA Expiration Date 7/18/2021

SLA Sample Text

SLA Serial Number Sample Text

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.

The screenshot shows the 'Section Properties' dialog box for the 'Address Information' section. The 'Detail Page' checkbox is checked, and the 'OK' button is highlighted with a red box.

Section Properties

Section Name Address Information

Display Section Header On ☒ Detail Page ☒ Edit Page

Layout

☐ 1-Column ☒ 2-Column

Tab-key Order

☐ Left-Right ☒ Top-Down

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.

The screenshot shows the Salesforce account detail page for 'Dickenson plc'. The top toolbar contains buttons for 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. The 'Save' button is highlighted with a red box and a red arrow. Below the toolbar is a 'Field' dropdown menu with options like 'Buttons', 'Custom Links', 'Quick Actions', etc. The main content area displays account information, including 'San Francisco, CA 94105 US', 'Additional Information' (Customer Priority, SLA Expiration Date, Number of Locations), 'System Information' (Created By, Last Modified By), 'Description Information' (Description), and 'Custom Links' (Billing).

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.

The screenshot shows the Salesforce account detail page for 'Dickenson plc'. The top navigation bar includes the 'Sales' app launcher icon (highlighted with a red box) and the 'Accounts' menu item (highlighted with a red box). The account details are displayed, including 'Customer - Channel', 'Industry', 'Annual Revenue', 'counts of colleges', 'property date', 'Weekdays', 'Account Source', 'SIC Information' (SIC Code 6752), and 'Address Information' (Billing Address 1301 Hoch Drive, Shipping Address 1301 Hoch Drive). The 'SIC Information' section is highlighted with a red box and a red arrow.

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.

