Phase 3 – Page Layouts

Objective: Organize fields into logical sections for usability.

Holding Page Layout Sections

1. **Information**
   - External ID
   - Holding Name
   - Security Symbol
   - Stock Name

2. **Basic Info**
   - Quantity
   - Purchase Price
   - Average Cost
   - Portfolio Average Cost (optional)

3. **Price Info**
   - Price (from Price Snapshot)
   - Retrieved Date/Time
   - Total Value
   - Total P&L

Portfolio Page Layout

- **Portfolio Info**
   - Name
   - Total Value
   - Total P&L

Tips:

- Keep related fields grouped.
- Collapse sections not needed frequently.

Setup Home Object Manager ∨

SETUP > OBJECT MANAGER
Holding

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Page Layouts
1 Items, Sorted by Page Layout Name

Quick Find | New | Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Holding Layout	Sujal Patil, 9/22/2025, 4:28 PM	Sujal Patil, 9/26/2025, 4:07 PM	▼

Setup Home Object Manager ∨

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Object Access

Save ▼ | Quick Save | Preview As... ▼ | Cancel | Undo | Redo | Layout Properties

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Quick Find | Field Name

Section	Exchange	Last Modified By	PnL	Retrieved At	Stock Name	Total Value(Auto)
Blank Space	External_Id__c	Latest Price	Portfolio	Security Symbol	Total Cost
Average Cost	Holding	Latest Price Time...	Price	Security Symbol	Total Cost
Created By	Holding Name	Market Value	Quantity	Source	Total Value

Holding Detail

Standard Buttons
Edit | Delete | Clone | Change Owner | Change Record Type | Printable View | Edit Labels

Custom Buttons

Information (Header visible on edit only)
External_Id__c   Sample Text
Holding   Sample Text
Security Symbol   Sample Text
Stock Name   Sample Text

System Information (Header visible on edit only)
🔒 Created By   Sample Text   🔒 Last Modified By   Sample Text

Custom Links (Header visible on edit only)

Basic Info

Search Setup

SETUP > OBJECT MANAGER
Holding

Save ▾ | Quick Save | Preview As... ▾ | Cancel | Undo | Redo | Layout Properties

Quick Find | Field Name | ✕

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Section	Exchange	Last Modified By	PnL	Retrieved At	Stock Name	Total Value(Auto)
Blank Space	External_Id__c	Latest Price	Portfolio	Security Symbol	Total Cost	
Average Cost	Holding	Latest Price Time...	Price	Security Symbol	Total Cost	
Created By	Holding Name	Market Value	Quantity	Source	Total Value	

Edit | Delete | Clone | Change Owner | Change Record Type | Printable View | Edit Labels

Information (Header visible on edit only)
External_Id__c   Sample Text
Holding   Sample Text
Security Symbol   Sample Text
Stock Name   Sample Text

System Information (Header visible on edit only)
🔒 Created By   Sample Text

Custom Links (Header visible on edit only)

Saving layout...

Basic Info
Quantity   5.1259
★ ● Holding Name   Sample Text
🔒 Total Value(Auto)   ₹123.45
Price   ₹123.45
★ ● Portfolio   Sample Text
Average Cost   ₹123.45

Price Info
Latest Price   ₹123.45
🔒 PnL   ₹123.45
Latest Price Timestamp   9/26/2025, 4:10 PM
🔒 Market Value   ₹123.45

New Section

https://orgfarm-b425e2779f-dev-ed.develop.my.salesforce.com/layouteditor/layoutEditor.ap...

Search Setup

SETUP > OBJECT MANAGER
Holding

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access

Fields & Relationships
23 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

Retrieved At	Retrieved_At__c	Date/Time	▾
Security Symbol	Security_Symbol_c__c	Text(10)	▾
Security Symbol	Security_Symbol__c	Text(10)	▾
Source	Source__c	Text(10)	▾
Stock Name	Stock_Name__c	Text(255)	▾
Total Cost	Total_Cost__c	Formula (Currency)	▾
Total Cost	Total_Cost_c__c	Formula (Currency)	▾
Total Value	Total_Value__c	Currency(16, 0)	▾
Total Value(Auto)	Total_Value_Auto__c	Formula (Currency)	▾