

UI Customization

Page Layouts

Page layouts allows to customize the design and organization of detail and edit pages of records in Salesforce.

Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom object's detail and edit page. It also controls which standard and custom buttons will be visible on detail pages and related lists.

Fields can be set as visible, read-only and required on page layouts.

Note: Page layouts should not be the sole means to restrict access to sensitive data a user should view or edit because it controls only a record's edit page and detail page no other parts of platform from where the records can be created or updated.

Search Layouts

Search layouts are used to customize the fields displayed for users in search results, search filter fields, lookup dialogs, recent records lists on tab home pages and in lookup phone dialogs for Salesforce CRM call center.

By default all lookup dialogs and related lists that results from new relationship only display record name or number. To add fields in these related lists and lookup dialogs administrator need to add fields in search layouts.

Search layouts are ordered group of fields that are displayed when a record is presented in a particular context such as in search results, a lookup dialog or in a related list.

Search layout consists of:

1. Search Results: The search result that originate from searching for a record on left side bar or an advanced search.
2. Lookup dialogs: The lookup dialogs result that originated from clicking next to a lookup field on an edit page.
3. Lookup Phone Dialogs: The lookup dialog result that originates from clicking next to the lookup field with a phone datatype on an edit page.
4. Object Tab: The list of recent records that appears on the home page of a tab and in a related list on other object's detail page.
5. Object List View: The layout is not for specifying fields, instead use it to specify the buttons that appear on the list view page for an object.
6. Search Filter Field: The filters that can be applied to search results.

Note: Encrypted, formula, lookup and roll-up summary fields are not searchable.

Mini Page Layouts

Mini Page layout contains a subset of the items in an existing page layout. When we hover on the record on recent items we see the fields which are present in mini page layouts.

Disclaimer

All information and Content on the given document is the property of Shrey Sharma or its licensors. The Content is protected by copyright laws, trademark and design rights. Any unauthorized use of the Content will be considered a violation of Shrey Sharma's intellectual property rights. Unless otherwise stated in this document, Shrey Sharma and its suppliers reserve all tacit and direct rights to patents, trademarks, copyrights or confidential information relating to the Content. Unless otherwise stated in this document, no Content may be copied, distributed, published or used in any way, in whole or in part, without prior written agreement from AptarGroup, except as allowed by the limited license contained in these Conditions of Use. You may not, and these Conditions of Use do not give you permission to, reproduce, reverse engineer, decompile, disassemble, modify or create derivative works with respect to the given document.

Each page layout has its own mini page layout.

Here the field access settings and profile associations to page layouts matter.

List Views

List view allows to filter the list of records on object's tab. List views present already can be edited and new list views can also be created to meet the organization requirements.

List views can be user specific as well as organization wide.

Salesforce1

Run your business through your phone. This app is for business users who actively pay for the organization and run their business through phone.

Note: The changes or customizations made in this app from Salesforce site gets reflected only after re logging into the app.

SalesforceA

It only allows administrators to manage the users on the go through phone. No more functionality is provided for administrators until Spring16.

Compact Layouts

Compact layouts specify the group of fields which are visible on the highlights panel of Salesforce1 for a quick glance on key field values of that record.

Compact layouts can have maximum of 10 fields. Compact layouts support all field types except text area, long text area, rich text area and multi-select picklist.

Actions

Actions add functionality to Salesforce. We have standard actions such as create and update record. Also we can create actions based on our company's requirement.

Actions enable users to do more in Salesforce and Salesforce1.

There are 2 types of actions in Salesforce:

1. Object-Specific Actions:

They let users quickly create or update records, log calls, send emails and more in the context of a particular object.

There are 5 types of object-specific actions:

Disclaimer

All information and Content on the given document is the property of Shrey Sharma or its licensors. The Content is protected by copyright laws, trademark and design rights. Any unauthorized use of the Content will be considered a violation of Shrey Sharma's intellectual property rights. Unless otherwise stated in this document, Shrey Sharma and its suppliers reserve all tacit and direct rights to patents, trademarks, copyrights or confidential information relating to the Content. Unless otherwise stated in this document, no Content may be copied, distributed, published or used in any way, in whole or in part, without prior written agreement from AptarGroup, except as allowed by the limited license contained in these Conditions of Use. You may not, and these Conditions of Use do not give you permission to, reproduce, reverse engineer, decompile, disassemble, modify or create derivative works with respect to the given document.

- **Create Records:** It create records that are automatically associated with related records.
- **Update Actions:** It makes it easy to edit the records. We can define the fields that will be available for updates.
- **Log a Call:** It lets users enter notes about calls, meetings or other interactions that are related to a specific record.
- **Custom Action:** These are VisualForce Pages or canvas app that let users interact with or create records that have an relationship to an object record.
The Visualforce page for an object specific custom action must include the standard controller for the relevant object.
- **Send email actions:** These are available only on cases. It gives users access to a simplified version of the case feed e-mail action on Salesforce1.

Note: Action Type cannot be edited once an action is created.

2. Global Actions:

These can be added to any page that supports action. For example home page, chatter tab and object pages.

Global create actions enable users to create object records, but the new record has no relationship with other records.

Use global actions to let users record call details, create or update records, send email, or create a task from the Salesforce1 Feeds page, Groups pages, and any other page driven by the global publisher layout.

Action Layout

Action layouts are similar to page layouts.

Just as object record pages have page layouts that can be customized, actions have action layouts that can be customized. When we create an action, Salesforce populates its layout with a default set of fields. You can add, remove, or reorder fields on the action layout to present only the essential items your users need when they're taking the action.

The first time you view the layout for an action you've created, certain fields are prepopulated: target object default fields, standard required fields, and any custom universally required fields.

Action layout can be created for object-specific actions as well as for global actions.

Global Publisher Layout

Global publisher layouts determine the global actions that appear in the various Salesforce interfaces

- In Salesforce Classic, these layouts customize the actions in Chatter publishers on global pages (like the Home page) and on the Chatter page.
- In Salesforce1, these layouts drive the actions that appear in the action bar on the Feed and People pages. Global publisher layouts can include global actions only.

Disclaimer

All information and Content on the given document is the property of Shrey Sharma or its licensors. The Content is protected by copyright laws, trademark and design rights. Any unauthorized use of the Content will be considered a violation of Shrey Sharma's intellectual property rights. Unless otherwise stated in this document, Shrey Sharma and its suppliers reserve all tacit and direct rights to patents, trademarks, copyrights or confidential information relating to the Content. Unless otherwise stated in this document, no Content may be copied, distributed, published or used in any way, in whole or in part, without prior written agreement from AptarGroup, except as allowed by the limited license contained in these Conditions of Use. You may not, and these Conditions of Use do not give you permission to, reproduce, reverse engineer, decompile, disassemble, modify or create derivative works with respect to the given document.

Note: Global publisher layouts can include global actions only./

Record Types

Record types allows to specify category of records that display different picklist values and page layouts.

Administrators can associate record types with profiles so that different types of users should see different picklist values and page layouts in record's detail page.

Note: When we create a record type on an object then a new standard record id field gets added to its field list. It stores the record type using which the record is created and used whenever the particular record is edited next time.

Disclaimer

All information and Content on the given document is the property of Shrey Sharma or its licensors. The Content is protected by copyright laws, trademark and design rights. Any unauthorized use of the Content will be considered a violation of Shrey Sharma's intellectual property rights. Unless otherwise stated in this document, Shrey Sharma and its suppliers reserve all tacit and direct rights to patents, trademarks, copyrights or confidential information relating to the Content. Unless otherwise stated in this document, no Content may be copied, distributed, published or used in any way, in whole or in part, without prior written agreement from AptarGroup, except as allowed by the limited license contained in these Conditions of Use. You may not, and these Conditions of Use do not give you permission to, reproduce, reverse engineer, decompile, disassemble, modify or create derivative works with respect to the given document.

Salesforce

Plot no.8, Pratap Nagar Scheme 3, Near Glass Factory, Tonk Road, Jaipur, Rajasthan 302015

Phone: +917568697474

By: Shrey Sharma

Website: www.shreysharma.com