# SALESFORCE ADMINISTRATION

Rapid Learning & Just In Time Support

# CONTENT

# 1 Introduction

### Info

- This document describes basic Administration of Salesforce Web Application.
  Document focuses on using built in functionality and user interface.
- Both of these can be extended by developing custom functionality and user interface using Apex programming language.
  This is covered in additional document "Salesforce Development - JITS".

## 1.1 What is Salesforce

### Info

- This chapter gives short overview on Salesforce.
- Salesforce is CRM Web Application based on MVC - Model View Controller approach.

### CRM

- CRM stands for Customer Relationship Management.
- Generally speaking CRM is type of application dedicated for working with your customers and allows you
  - to maintain database of you current and potential customers organized into companies and their workers
    Salesforce stores companies data into Accounts and workers data into Contacts
  - to maintain database of products and services offered your company
  - to define different sales processes in order to automate Leads collection, Offers creation, Contracts executions followed by delivery, billing, reporting and other related processes

### Web Application

- Web Application is type of application which is accessed through Web Browser like: Internet Explorer, Chrome and such.
- This means that nothing is being locally installed on your PC.
- All data is being stored on the remote servers or to use modern term "In the cloud" which means that you
  - can access Application from any device as long as it is connected to internet and has Web Browser
  - don't have to buy and maintain expensive hardware in order to run the servers on which application should run
  - don't need extra space for that hardware like dedicated server rooms
  - don't need army of IT experts that might be needed to maintain that hardware or supporting software like databases or web servers

### Salesforce as CRM application

- At the beginning Salesforce was just a dedicated CRM Web Application.
- This means that you could only use it as it is.
- You couldn't use it to create your own heavily customizable functionality.
- At that time Salesforce was not considered a framework, collection of tools which allows you to build your own applications.

### Salesforce as framework

- With time Salesforce grew to a full blown web framework.
- This means that it added functionality that allows users to add their own custom functionality to basic CRM application by
  - creating their own custom Objects
  - creating their own workflows, processes, validations, reporting and such
  - using Java Script and Apex programming languages to create custom web pages and functionality
- But all this extra functionality is heavily oriented toward sales and billing processes, web shops and such.
  So don't expect to be using Salesforce framework to create modern web based gamed or online educational materials.

## Salesforce as two headed beast

- Salesforce history is to blame that currently Salesforce behaves as two headed beast.
- Once you learn how framework works you have to start over learning how core CRM functionality works.
- This is so because core CRM functionality is not based on the framework but rather existed before framework was born.
- As a result core CRM functionality behaves differently than the framework by having functionalities not supported by the framework which can be very confusing at times.

## MVC - Data Model

- To store data Salesforce uses Objects, Records and Fields which represent Data Model part of MVC approach.
  These are stored into Oracle relational database as Tables, Rows and Columns.
- So each Object, together with its Fields, defines specific type of data.
  For instance Account Object represents Company and contains Fields for holding data specific for each company like: Name, Address, Number of employees, Type of industry and such.
  For each specific Company, Record of Account Object is created and values specific for that company are entered into mentioned fields.
  Each such record is stored as a row in DB in Table called Account.

## MVC - Controller

- To define business logic Salesforce uses workflows, validation rules and custom programming code which together represents Controller part of MVC approach.
- Workflow defines how data should be changed.
- Validation rules take care of data integrity insuring that data makes sense so that users can't enter whatever they want.
- Custom Java Script and Apex programming code allows deep level of business logic customization that might not be supported by built in functionality like workflows and validation rules.

## MVC - View

- To interact with users Salesforce uses Web Pages which represent View part of MVC approach.
- Examples of such Web Pages are
  - Page Layouts which define which Fields of specific Object will be presented to user and in which order
  - workflow rules which allow you to define sales processes, that is how data should be altered
  - validation rules which allow you to maintain data integrity by defining rules which data must obey to be altered
- Salesforce also supports creation of customizable Web Sites, collections of Web Pages.

## Other components

- Beside data, logic and UI components Salesforce also supports additional functionality like
  - security
  - reporting
  - tools for exporting and importing data like Data Loader or Import Wizard
  - tools for developing code like Developer Console, Eclipse plugins

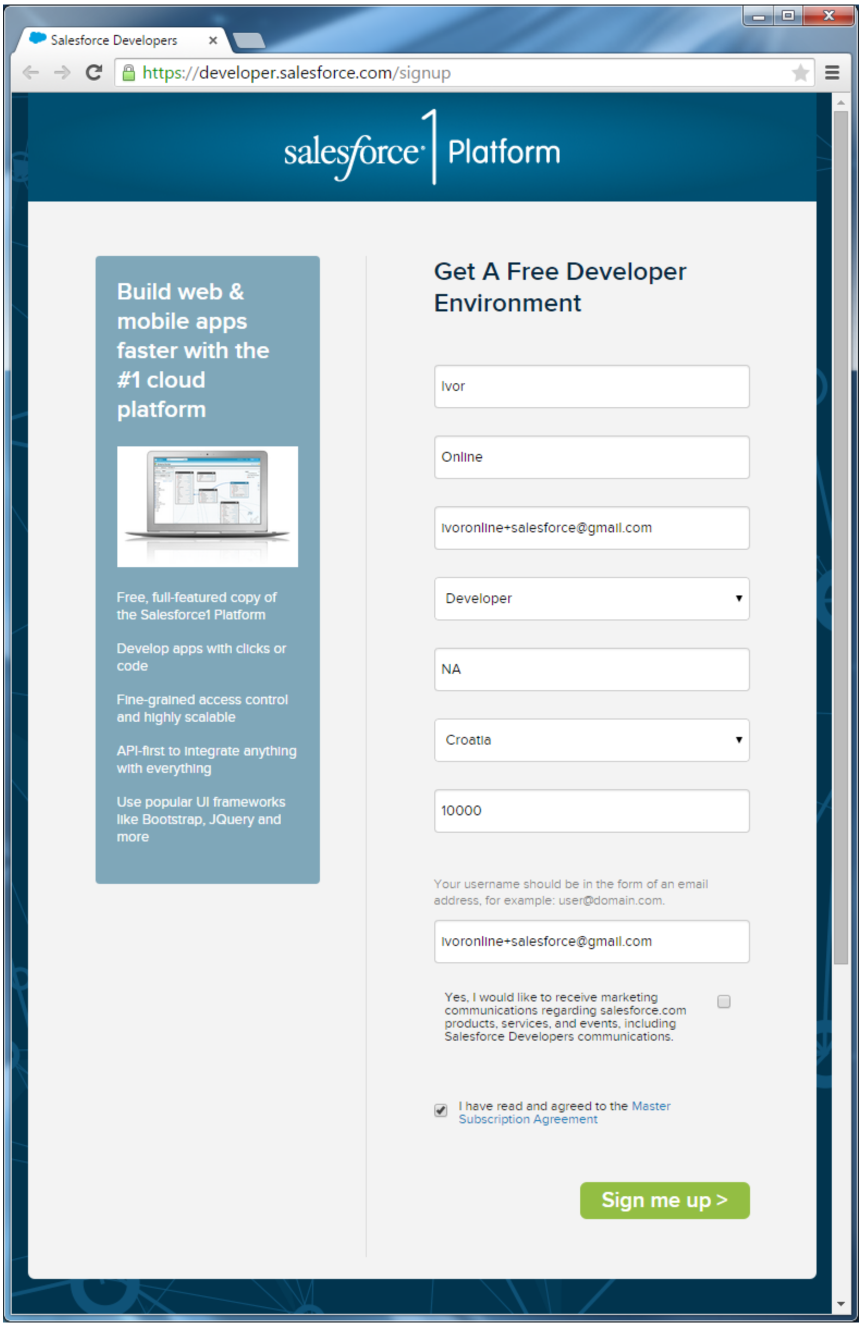
# 1.2 Create salesforce.com development org

## Info

- This tutorial shows how to create new salesforce.com development org.

## Create Account

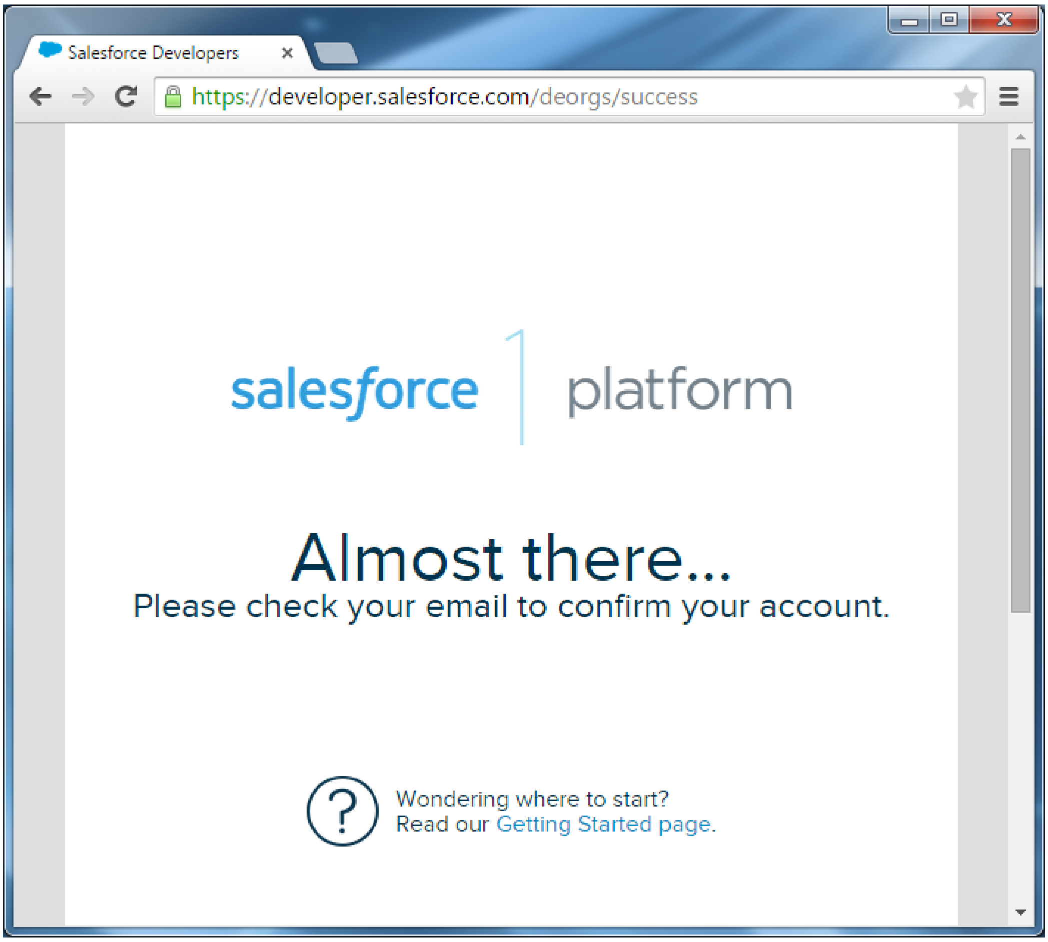
- https://www.developerforce.com/events/regular/registration.php
- First name: Ivor
- Last name: Online
- Email: ivoronline+salesforce@gmail.com
- Developer
- Company: NA
- Croatia
- Postal Code: 10000
- Username: ivoronline+salesforce@gmail.com
- I have read and agreed: CHECK
- Sign me up



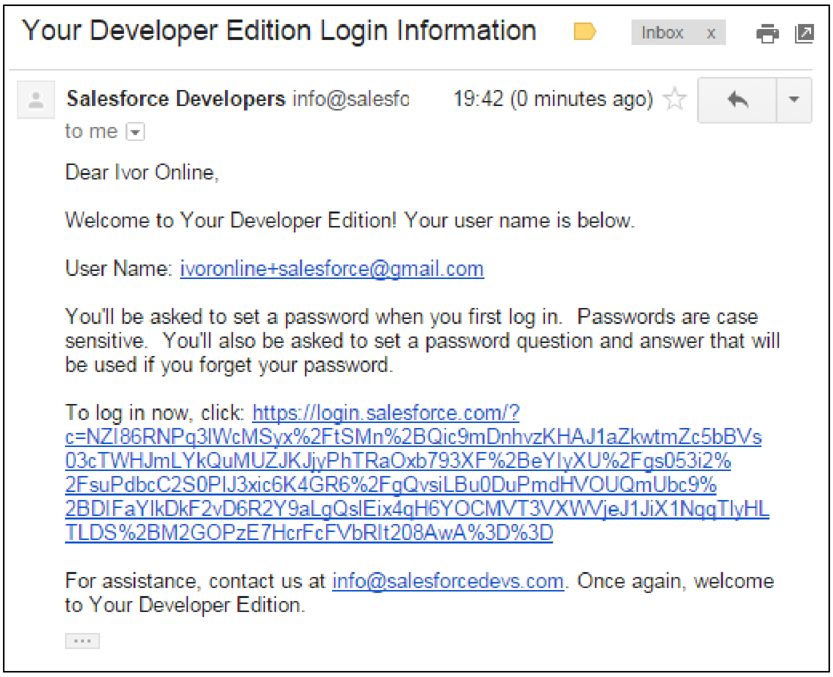
## Activate Account

- Check Email
- Click on link in Email
- New Password: B...5
- Verify New Password: B...5
- Question: What is your pet's name
- Answer: Rex
- Save

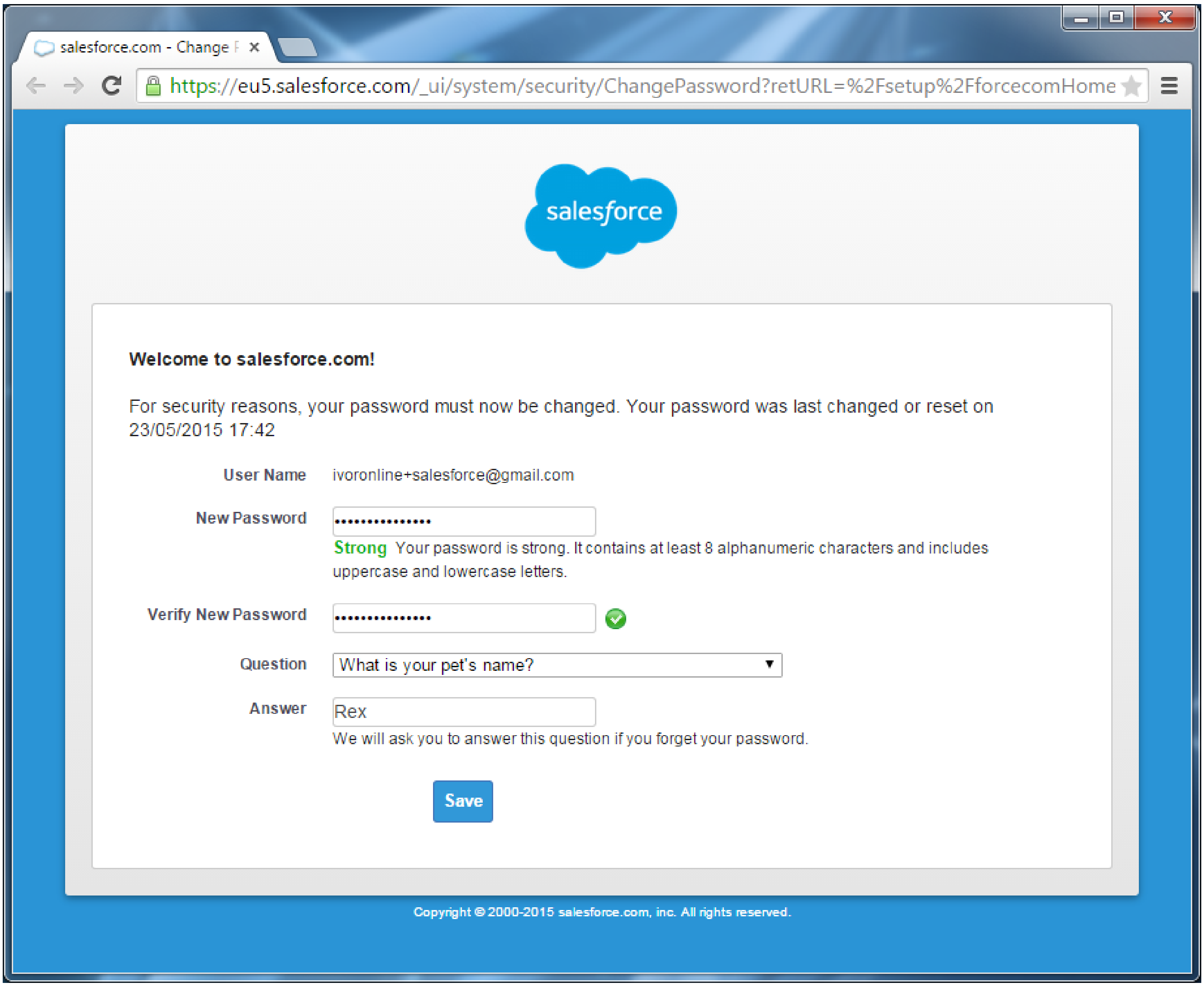
*Check Email*



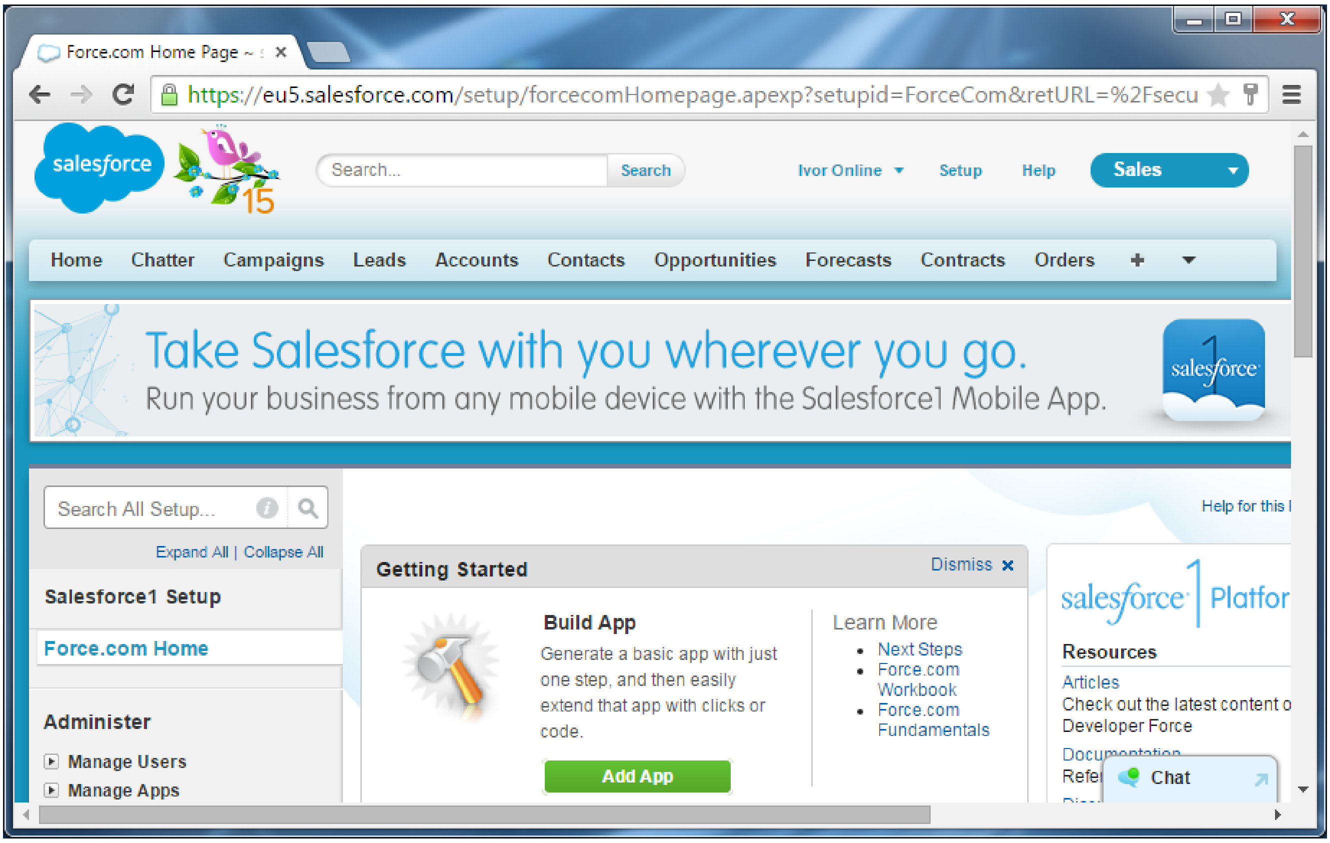

*Click on link in Email*



*Enter Password*




*Initial screen*



# 1.3 Login

## Info

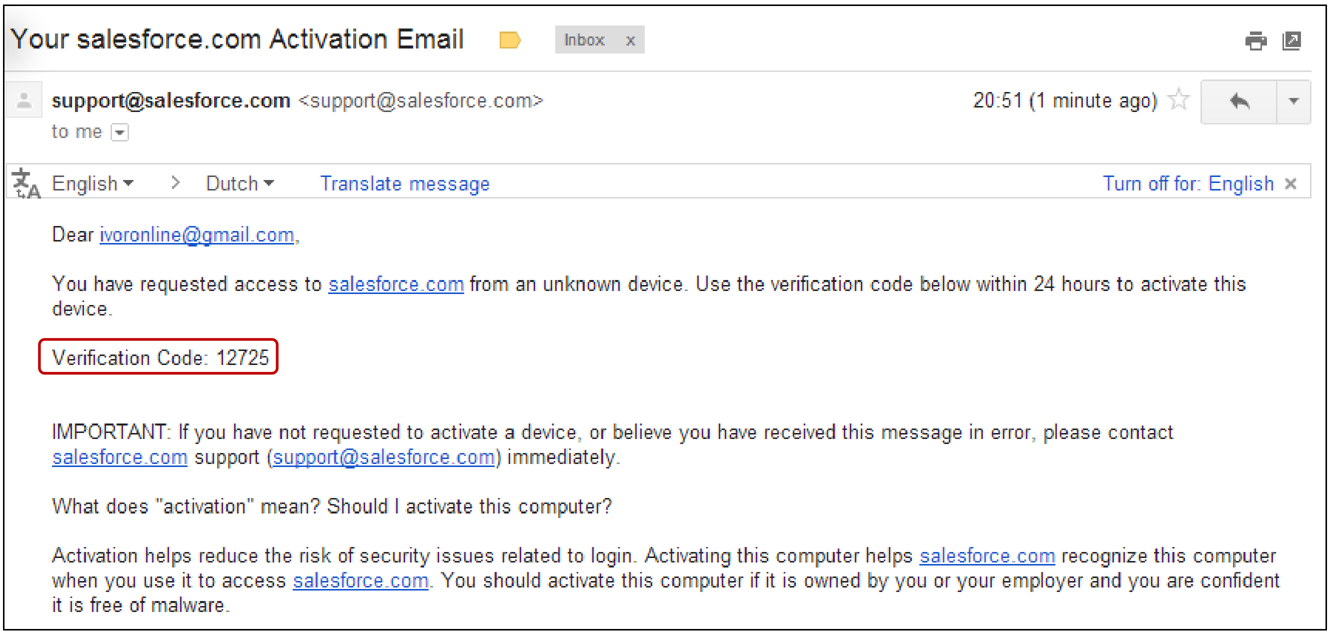
- This chapter shows how to login into Salesforce as a specific user.
- This can be done by using any Web Browser like: Internet Explorer, Google Chrome, Safari, Opera, Firefox, etc.
- Exact URL may differ since any domain name can be connected to Salesforce.
- Additional Activation will be required when logging for the first time from a new device.

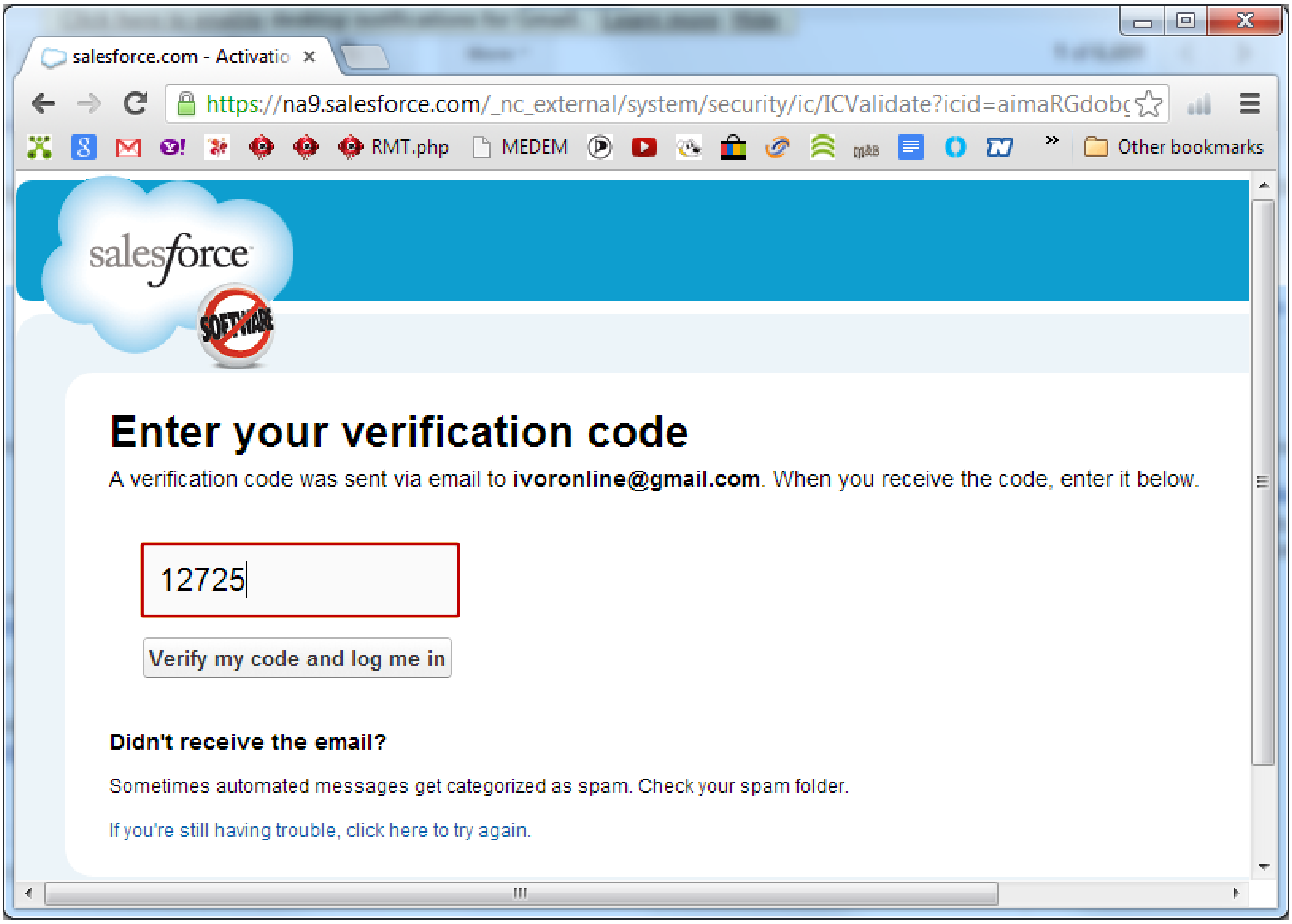
## Procedure

- Start Web Browser
- URL: https://login.salesforce.com
- User Name: ivor.goreta@16demo.com
- Password: B...0
- Login

**Activation** (Needed when logging for the first time from a new device)

- (Email me a verification code)
- Open Email
- Copy verification code from Email
- Paste verification code into Web Form
- Verify my code and log me in



# 2 Data Model

### Info

- This chapter describes Salesforce functionality which allows you to create data model.
- Data Model only describes how data should be organized but it doesn't not actually contain any specific data.

## 2.1 Custom Objects

### Info

- Custom Objects are Objects created by user.
- They are used to expand basic Salesforce functionality provided by Standard Objects which are already part of Salesforce.

### Custom vs Standard Object

- Custom Objects can be created or deleted, unlike Standard Objects.
- Custom Objects can't use all the functionality that exists for some Standard Objects, like for example composite fields.

# 2.1.1 View list of Custom Objects

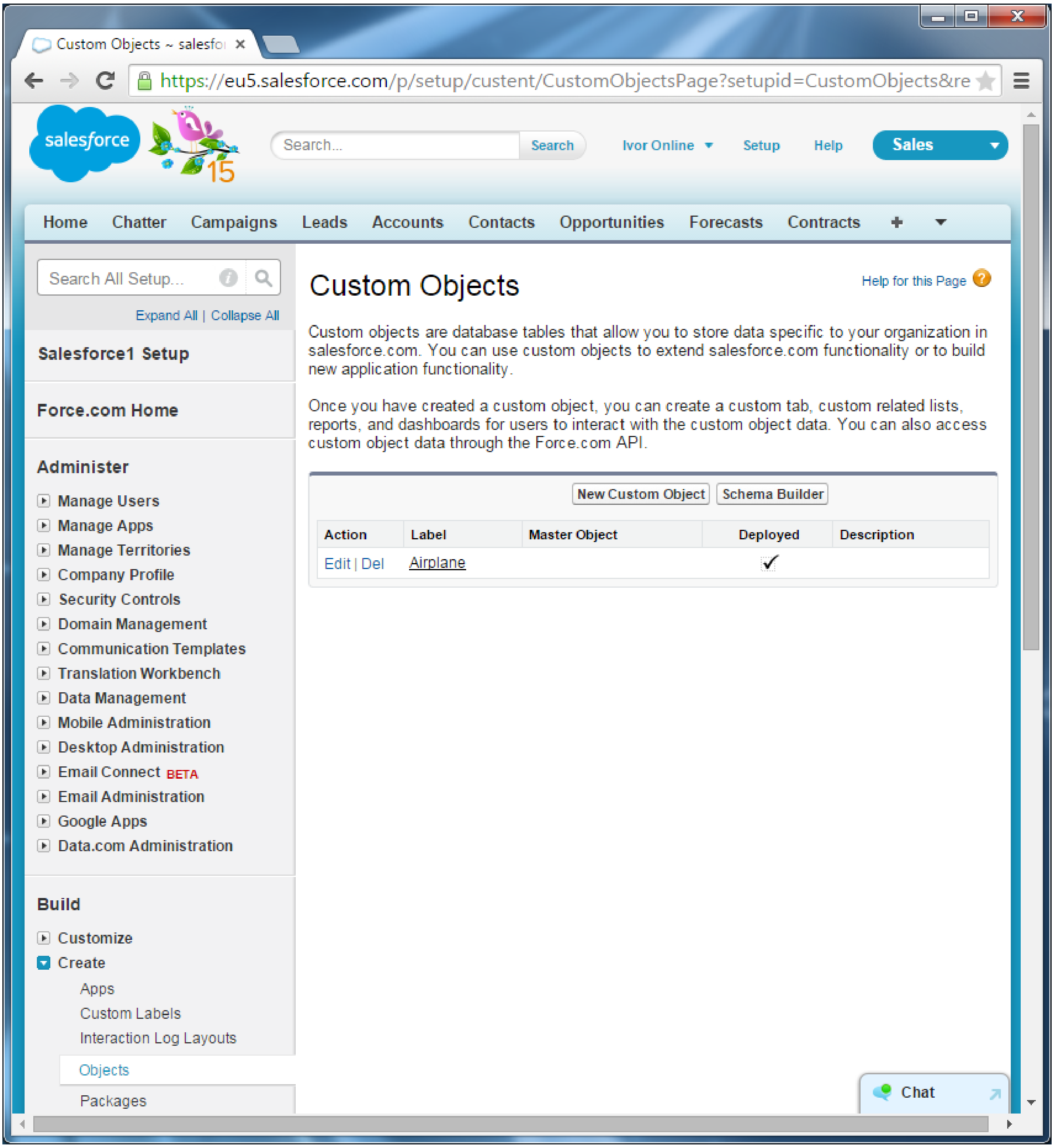
## Info

- This chapter shows how to view list of Custom Objects.

## View list of Custom Objects

- Login
- Setup
- Build
- Create
- Objects

*List of Custom Objects*



# 2.1.2 Create Custom Object

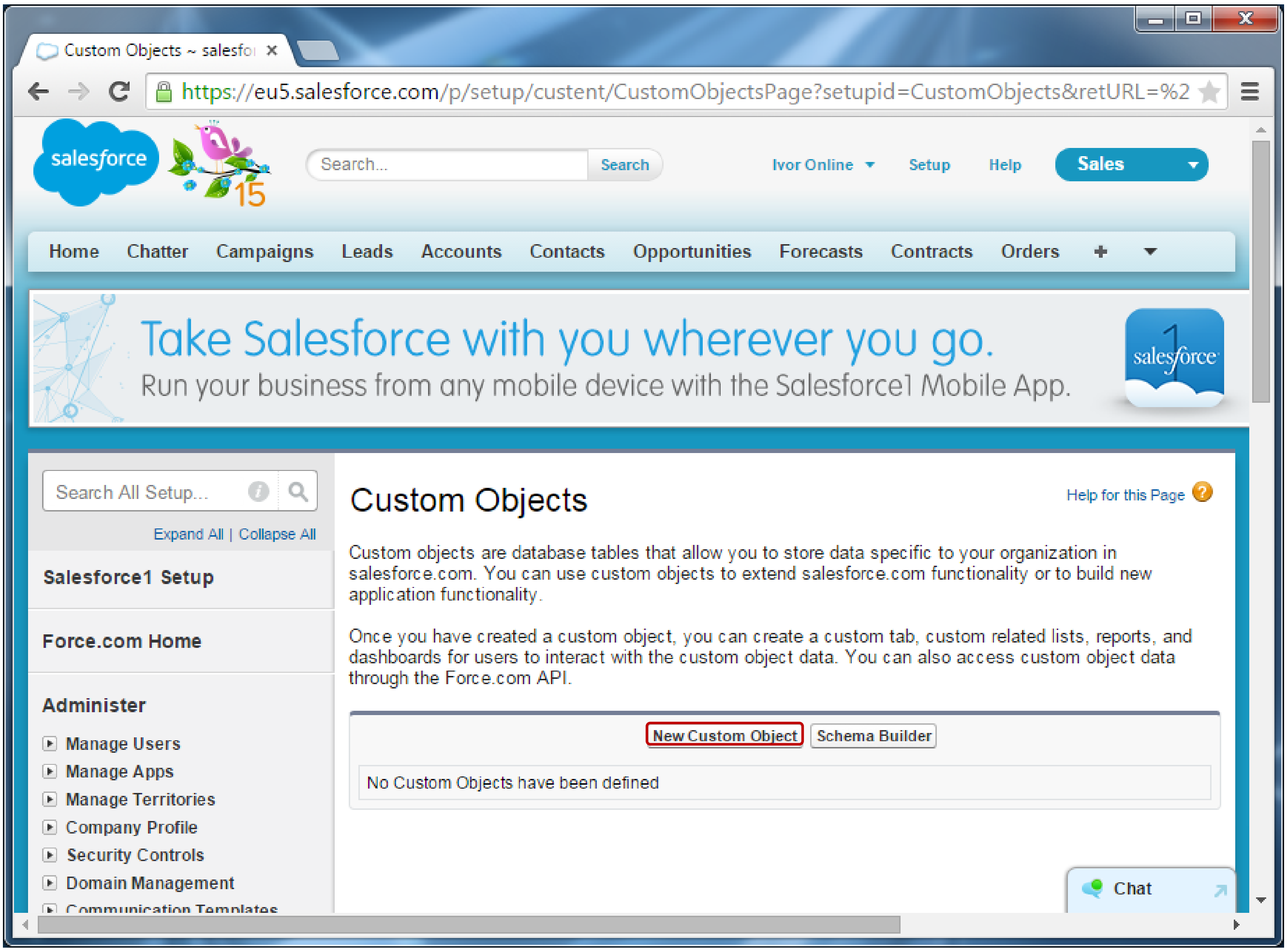
## Info

- This chapter shows how to create Custom Object.

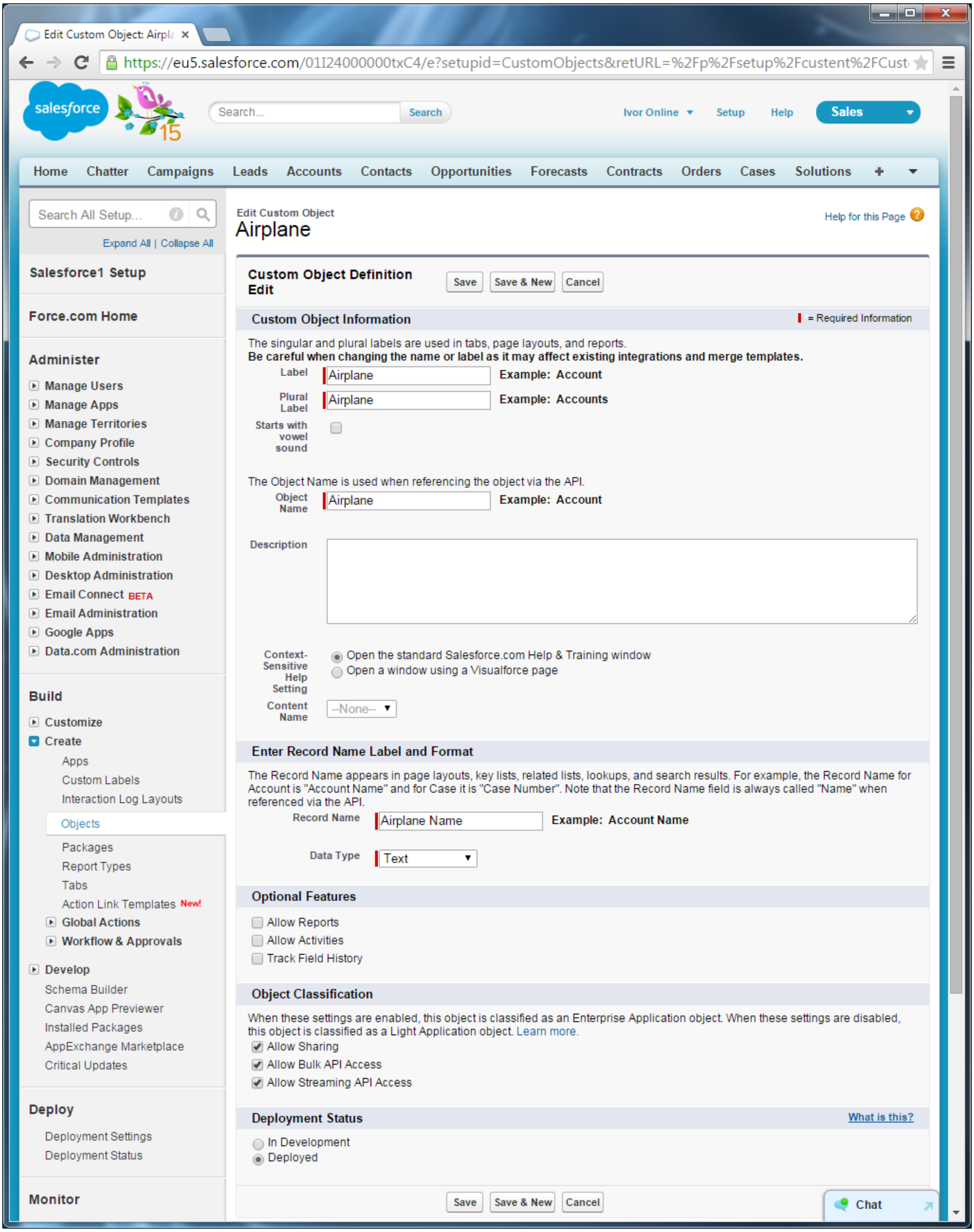
## Create Custom Object

- View list of Custom Objects
- New Custom Object
- Label: Airplane
- Plural Label: Airplane
- Save

*List of Custom Objects*

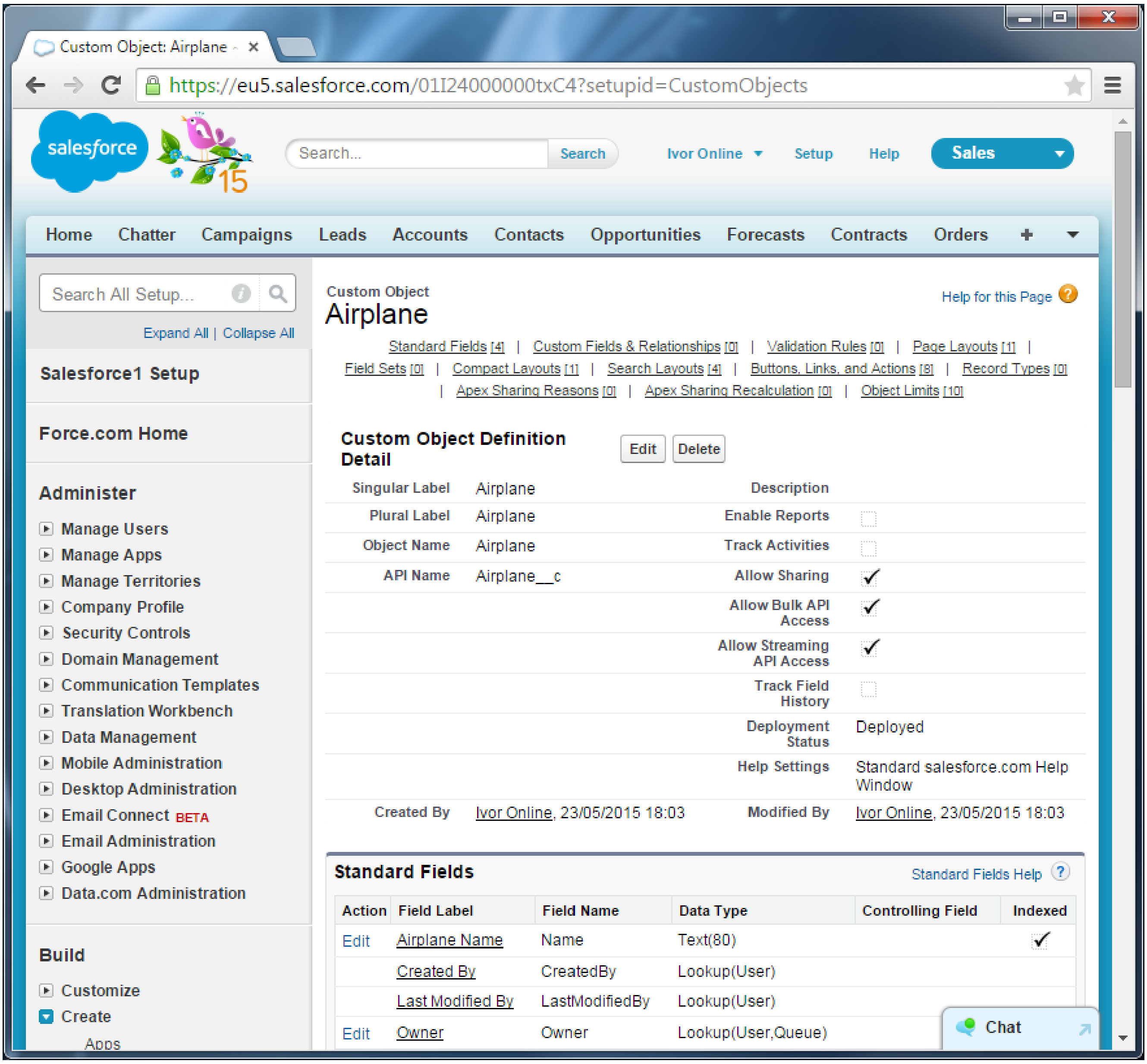


*Edit Screen*

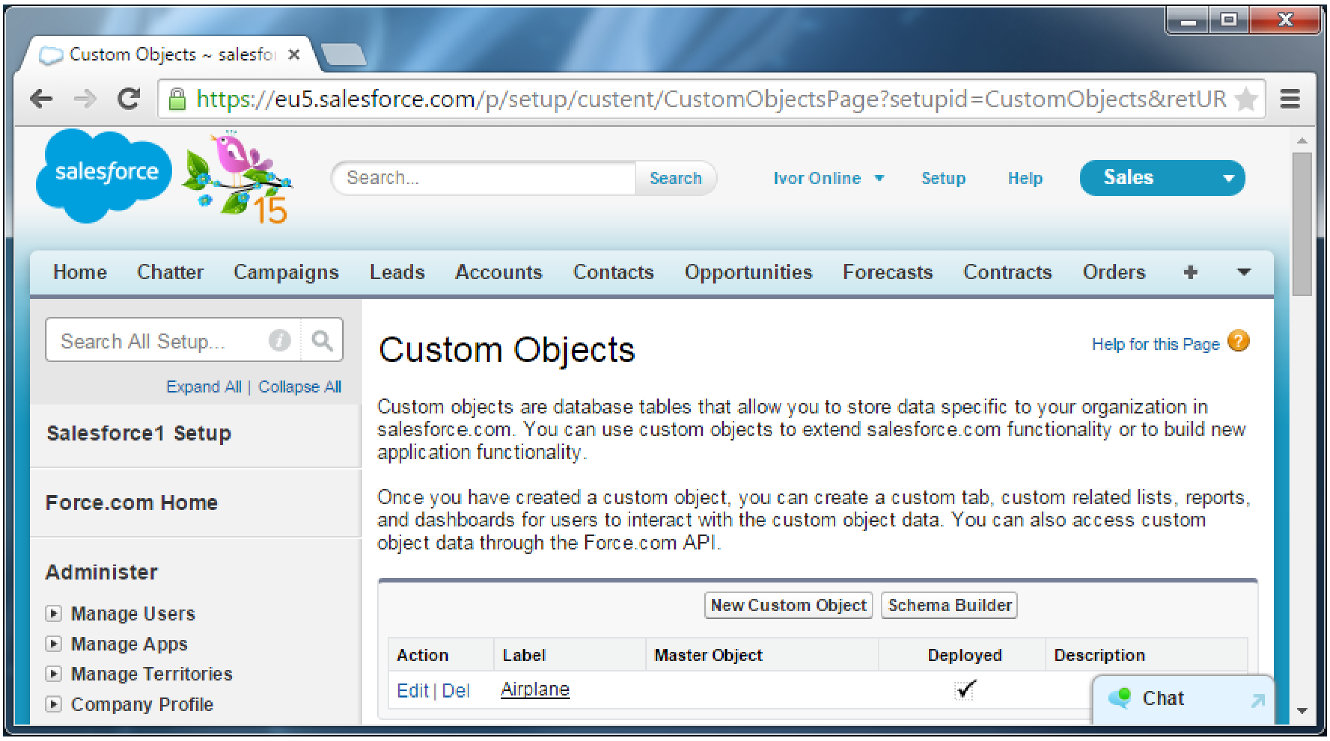


Edit Custom Object: Airpla
https://eu5.salesforce.com/01I24000000txC4/e?setupid=CustomObjects&retURL=%2Fp%2Fsetup%2Fcustent%2FCust
salesforce
Search...
Search
Ivor Online
Setup
Help
Sales
Home
Chatter
Campaigns
Leads
Accounts
Contacts
Opportunities
Forecasts
Contracts
Orders
Cases
Solutions
Search All Setup...
Expand All | Collapse All
Salesforce1 Setup
Force.com Home
Administer
Manage Users
Manage Apps
Manage Territories
Company Profile
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Email Connect BETA
Email Administration
Google Apps
Data.com Administration
Build
Customize
Create
Apps
Custom Labels
Interaction Log Layouts
Objects
Packages
Report Types
Tabs
Action Link Templates New!
Global Actions
Workflow & Approvals
Develop
Schema Builder
Canvas App Previewer
Installed Packages
AppExchange Marketplace
Critical Updates
Deploy
Deployment Settings
Deployment Status
Monitor
Edit Custom Object
Airplane
Help for this Page
Custom Object Definition Edit
Save
Save & New
Cancel
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Airplane
Example: Account
Plural Label
Airplane
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Airplane
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Airplane Name
Example: Account Name
Data Type
Text
Optional Features
Allow Reports
Allow Activities
Track Field History
Object Classification
When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Deployment Status
What is this?
In Development
Deployed
Save
Save & New
Cancel
Chat

*Created Object (Contains Standard Fields)*




*Created object is listed under Custom Objects*



# 2.1.3 Edit Custom Object

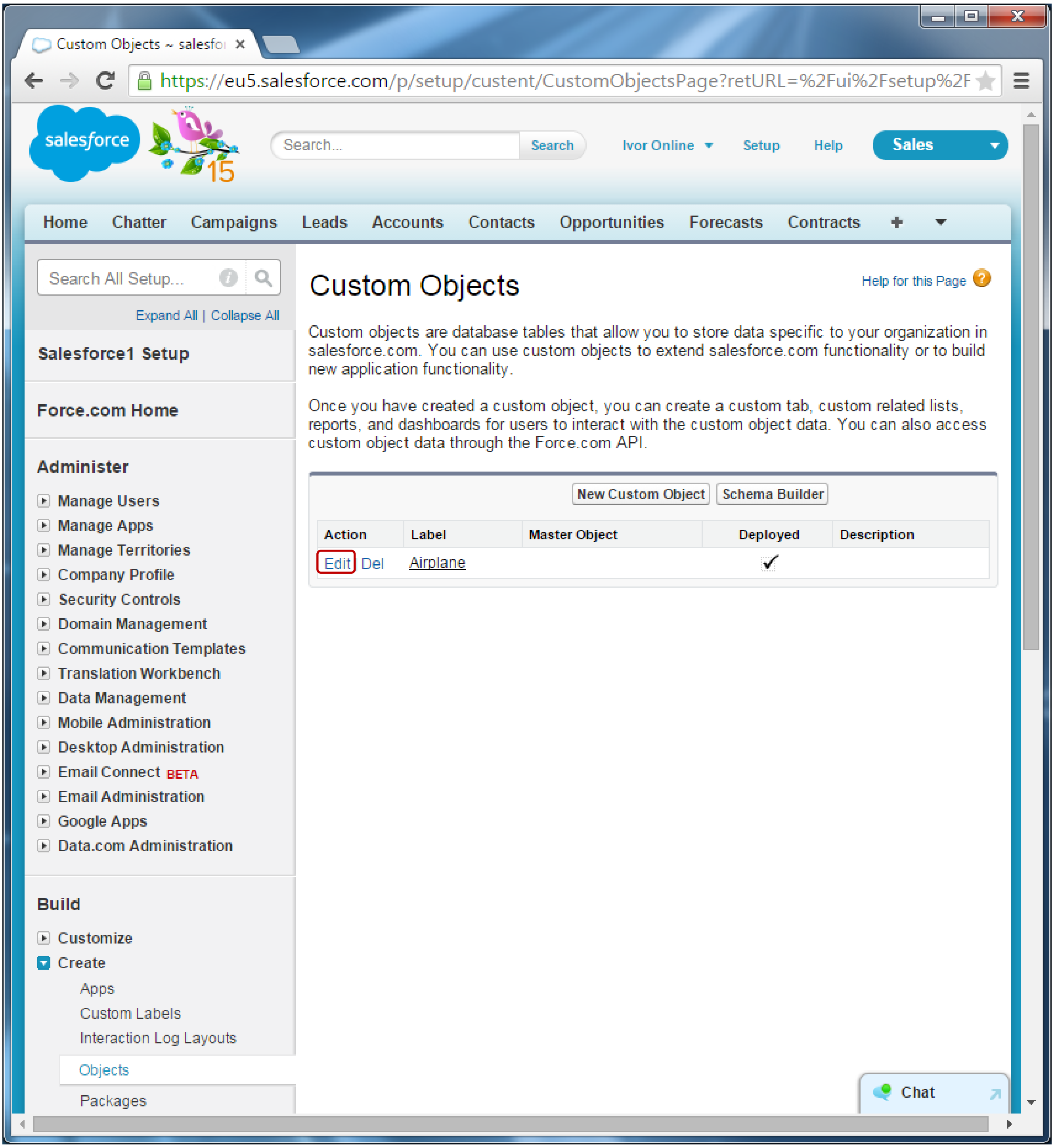
## Info

- This chapter shows how to edit Custom Object.

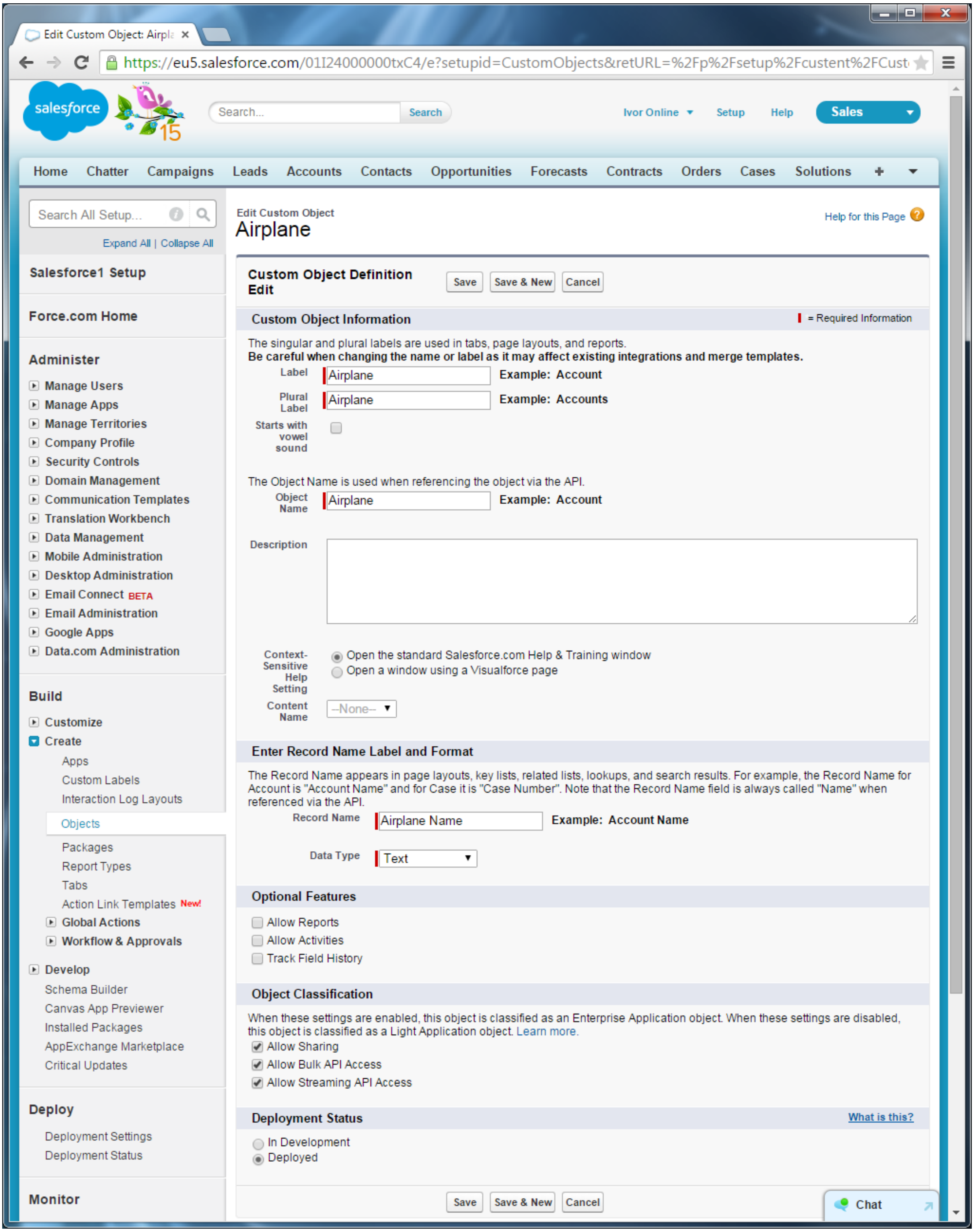
## Edit Custom Object

- View list of Custom Objects
- (Click on Edit left from Object you want to delete)
- (Change data)
- Save

*List of Custom Objects*



*Edit Screen (It is the same as when you are creating new Object)*



# 2.1.4 Delete Custom Object

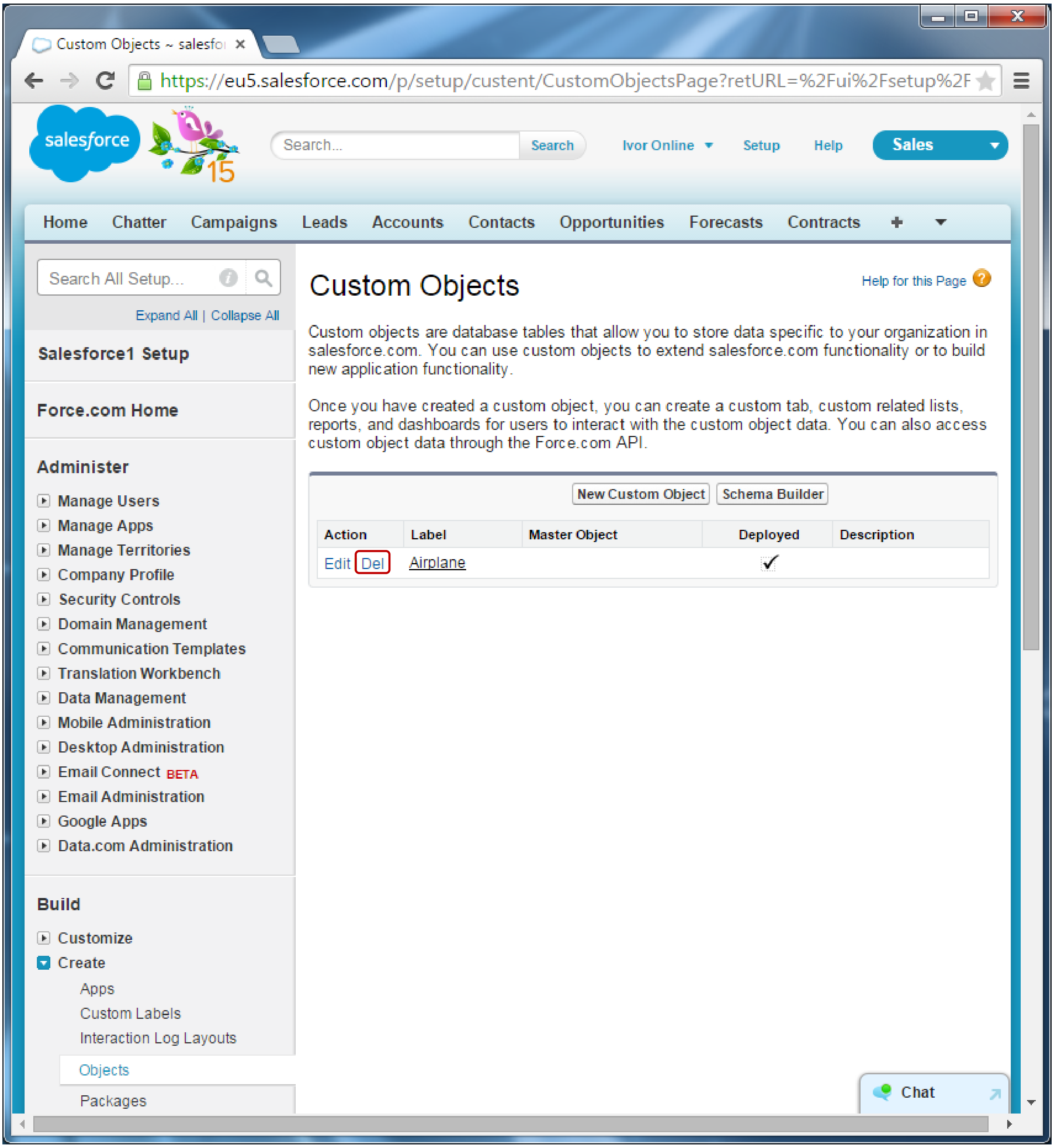
## Info

- This chapter shows how to delete Custom Object.

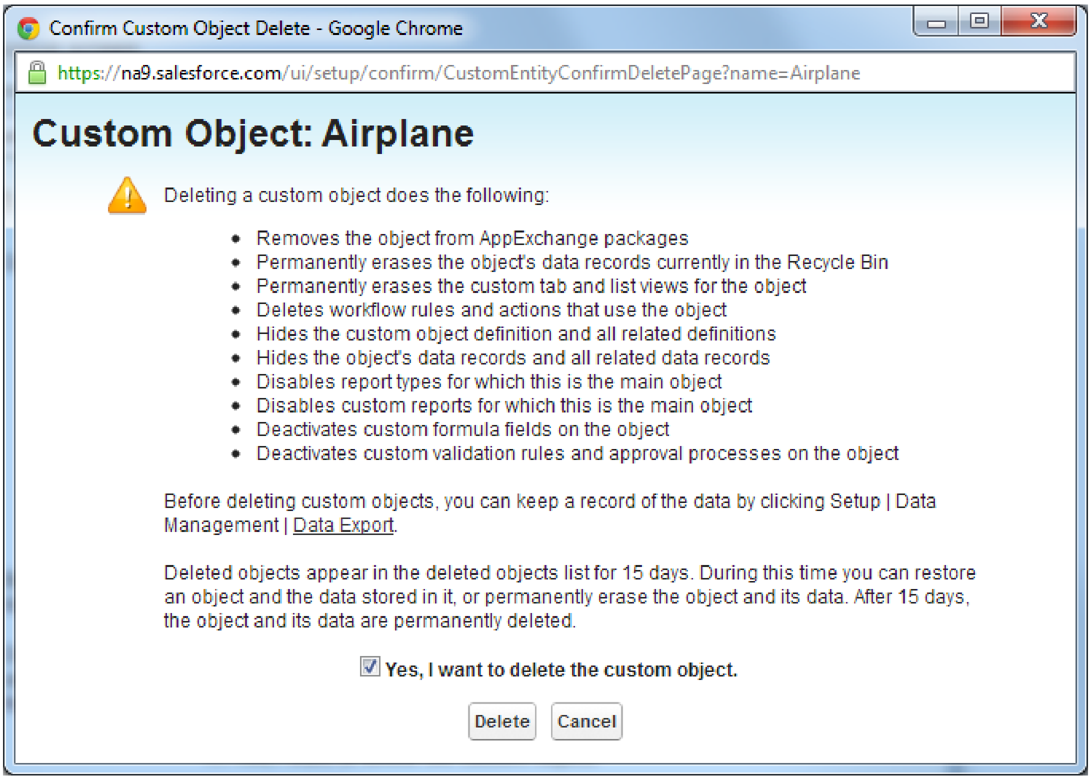
## Delete Custom Object

- View list of Custom Objects
- (Click on Del left from Object you want to delete)
- Yes, I want to delete the custom object.: CHECK
- Delete

*List of Custom Objects*



*Confirmation popup screen*



# 2.2 Fields

## Info

- Fields are parts of Object used to hold data.
- When you create Record of certain Object you use fields to hold data specific for that Record.
- Additional info can be found at Custom Field Attributes.

## Standard & Custom Fields

### Standard Fields

- Can't be deleted.
- Can be removed from view.
- Only some standard fields can be renamed.
- Following standard Fields are automatically created with each new Object (Defining Custom Object Fields)
  - ID – Unique ID of the record.
  - Name – Identifier for the custom object record.
  - Owner – Assigned owner of the custom object record.
  - Created By – User who created the record.
  - Created Date – Date when record was created.
  - Last Modified By – User who most recently changed the record.
  - Last Modified Date – Date when record was most recently changed.
  - Division – Division to which the custom object record belongs
  - Currency – Currency of the record if multicurrency is enabled.

### Custom Fields

- Fields created by a user.
- Deleted custom fields can be restored by admin inside first 15 days after deletion.

## External ID

- External ID Fields are used instead of Lookup fields to reference data which is in an external system outside Salesforce.
- For External ID Fields it is optional to make them unique.
- Each Object can have maximum of 3 External ID Fields.
- Only Fields of following Field types can be flagged as External IDs
  - Auto Number
  - Number
  - Email
  - Text
- When upserting records using External ID
  - If multiple matched records are found, an error is reported
  - If single matched record is found, record is updated
  - If no matched record is found, a new record is created

## Required Fields [R]

- Required field is a custom field that must have a value whenever a record is saved.
- Required Fields are always displayed on all page layouts.
- Required fields may be blank on records that existed before making the field required.
- When user updates record with a blank required field, value must be entered in the required field before saving record.
- Field can be made required using
  - Checkbox on a Field
  - Page Layout
  - Validation Rule

### Record ID

- Record ID is alpha-numeric field which uniquely identifies a record.
- The first three characters represent an object type
- There are two types of Record IDs
  - The 18 digit record ID is not case-sensitive.
  - The 15 digit record ID is case sensitive
- You can get Record ID by using
  - URL
  - Report
  - Web services API

### Other Info

- When Changing Data Type there is a danger of losing data.
- The description is intended to describe the field to administrators and developers, and it does not appear to the end user.

# 2.2.1 Create Field

### Info

- Each of the following chapters shows one of the steps you have to go through each time you want to create a new Field.
- Steps are identical for all the Field types except for the second step which is used to define specific Field attributes.

# 2.2.1.1 Show Custom Fields

### Info

- This chapter shows how to show list of Fields belonging to specific Object.
  Procedure differs between Standard and Custom objects as shown below.
- From there you can click on New button in order to create new field.
  After that wizard will guide you through different setup pages depending on selected field type.

### For Standard Object

- Setup
- Build
- Customize
- Accounts
- Fields (Displays Account fields)
- Section: Account Custom Fields & Relationships
- New

**Account Custom Fields & Relationships** New | Field Dependencies — Account Custom Fields & Relationships Help ?

| Action | Field Label | API Name | Data Type | Indexed | Controlling Field | Modified By |
|---|---|---|---|---|---|---|
| Edit \| Del \| Replace | Active | Active__c | Picklist | | | Ivor Online, 23/05/2015 17:42 |
| Edit \| Del \| Replace | Customer Priority | CustomerPriority__c | Picklist | | | Ivor Online, 23/05/2015 17:42 |
| Edit \| Del | Number of Locations | NumberofLocations__c | Number(3, 0) | | | Ivor Online, 23/05/2015 17:42 |
| Edit \| Del \| Replace | SLA | SLA__c | Picklist | | | Ivor Online, 23/05/2015 17:42 |
| Edit \| Del | SLA Expiration Date | SLAExpirationDate__c | Date | | | Ivor Online, 23/05/2015 17:42 |
| Edit \| Del | SLA Serial Number | SLASerialNumber__c | Text(10) | | | Ivor Online, 23/05/2015 17:42 |
| Edit \| Del \| Replace | Upsell Opportunity | UpsellOpportunity__c | Picklist | | | Ivor Online, 23/05/2015 17:42 |

### For Custom Object

- Setup
- Build
- Create
- Objects
- Employee
- Fields (Displays Object fields)
- Section: Custom Fields & Relationships
- New

**Custom Fields & Relationships** New | Field Dependencies | Set History Tracking — Custom Fields & Relationships Help ?

| Action | Field Label | API Name | Data Type | Controlling Field | Modified By | Track History |
|---|---|---|---|---|---|---|
| Edit \| Del | Manager | Manager__c | Lookup(Employee) | | Ivor Goreta, 03/07/2012 12:32 | ☐ |
| Edit \| Del | User | User__c | Lookup(User) | | Ivor Goreta, 03/07/2012 14:47 | ☐ |

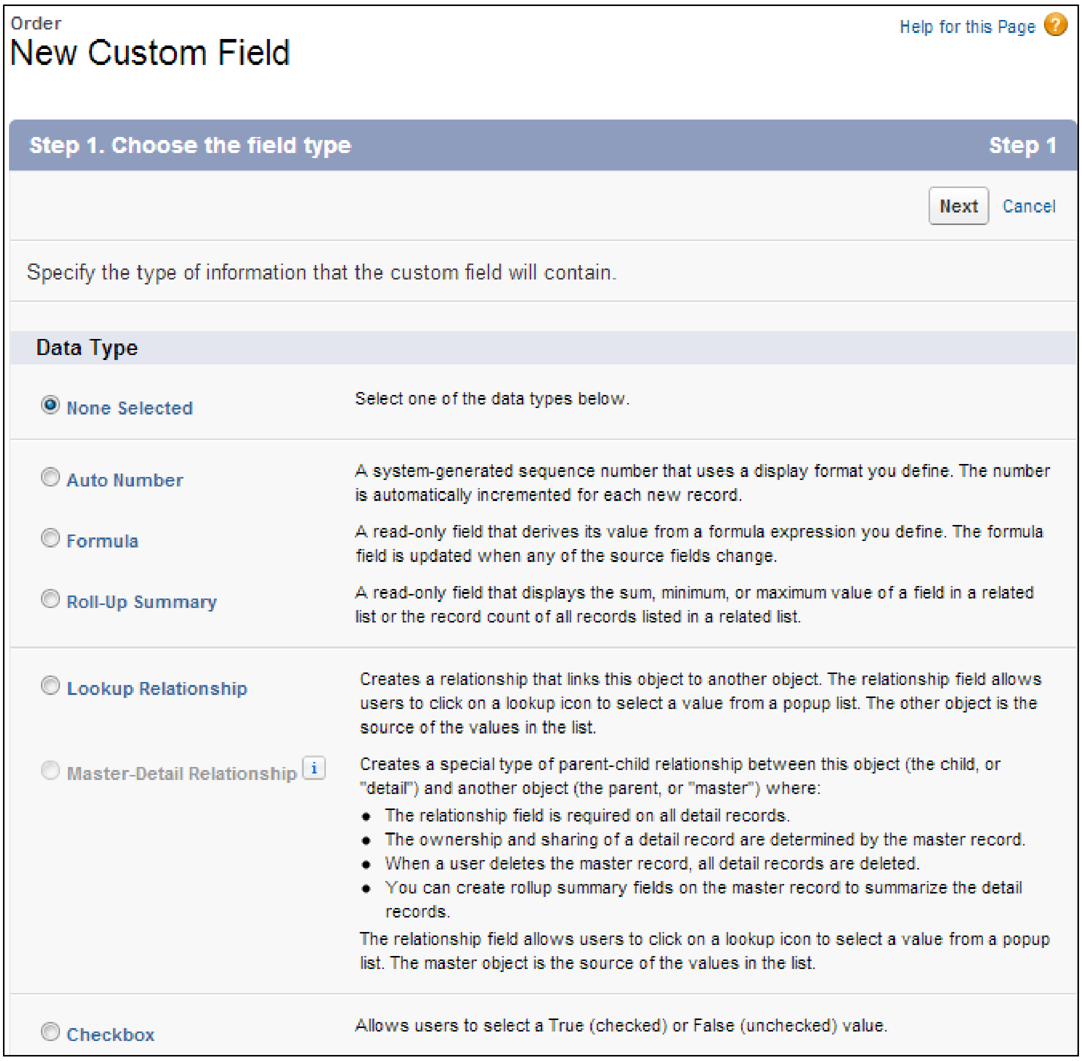
# 2.2.1.2 Step 1. Choose Field Type

## Info

- This chapter shows how to open "New Custom Field" page which is first step in creating new Field.
- On this page you choose type of the field which you want to create.
- After that wizard will guide you through different setup pages depending on selected field type.
- Accessing this page differs depending is Field is being added to Standard or Custom Object.

## Procedure

- Show Object Fields
- New
- (Select Field Type)
- Next



# 2.2.1.3 Step 2. Define Field Parameters

## Info

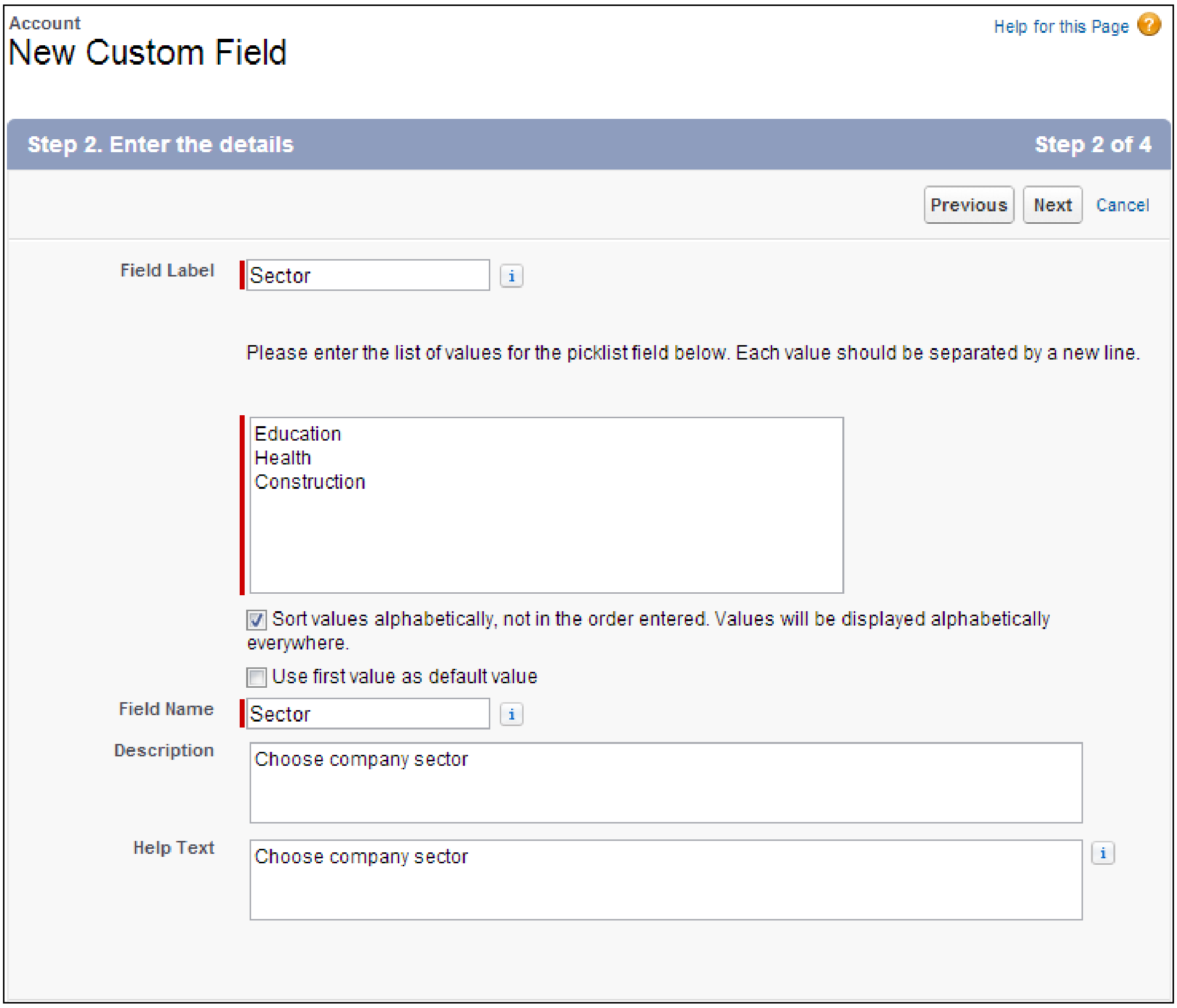
- This chapter shows how to specify parameters for Picklist Field.
- This step will be different for each Field Types as shown in chapter Field Types.

## Procedure

- Choose Field Type
- Define Field Parameters
- Establish field-level security
- Add to Page Layout

## Define Field Parameters

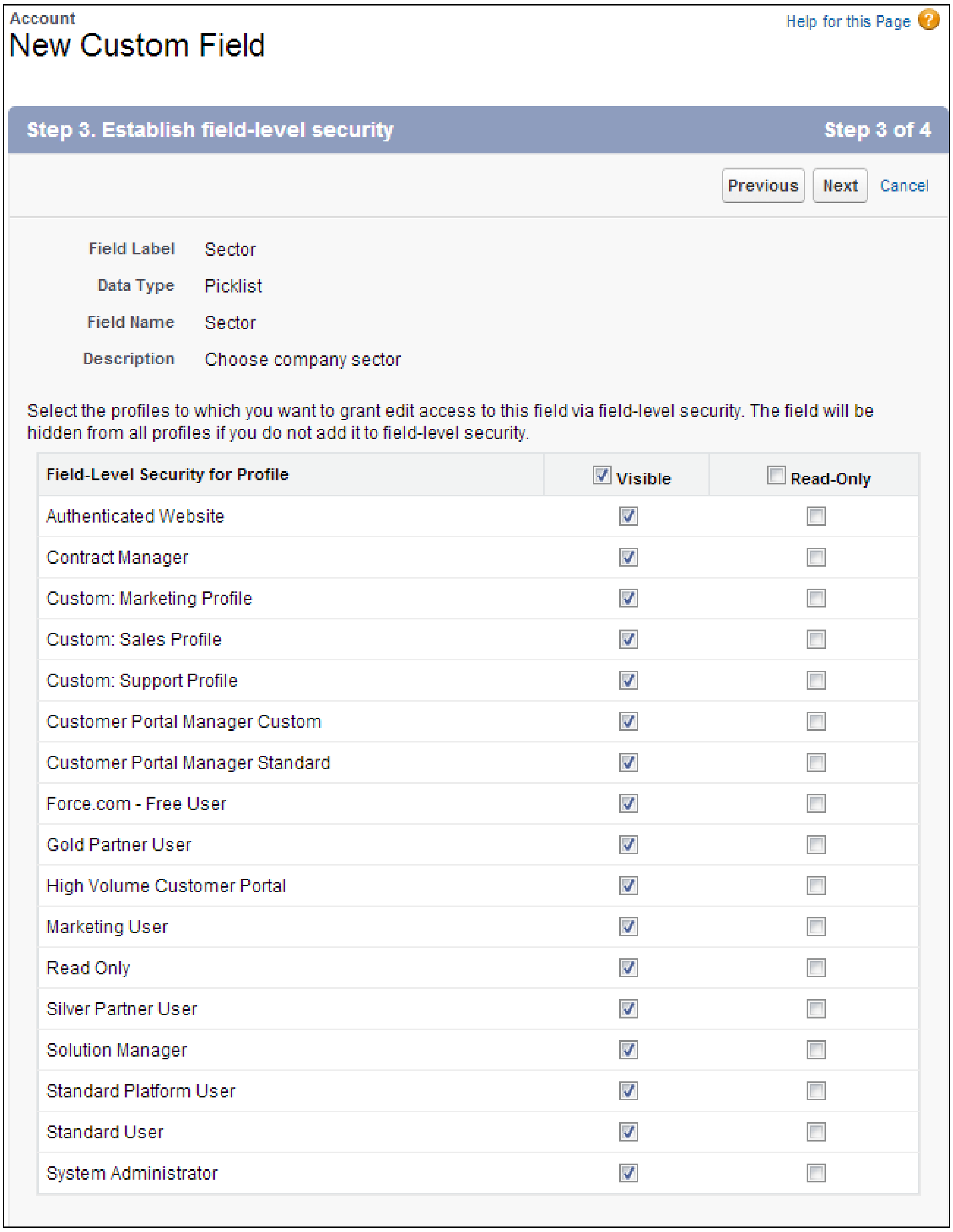
- Picklist: CHEK – Next
- Field Label: Sector
- Please enter the list of values for the picklist field below. Each value should be separated by a new line.
- Education
- Health
- Construction
- Sort values alphabetically, not in the order entered: CHECK
- Use first value as default value: CHECK
- Field Name: Sector
- Description: Choose company sector (Describes field to administrators and developers, not end user)
- Help Text: Choose company sector
- Next



# 2.2.1.4 Step 3. Establish field-level security

## Info

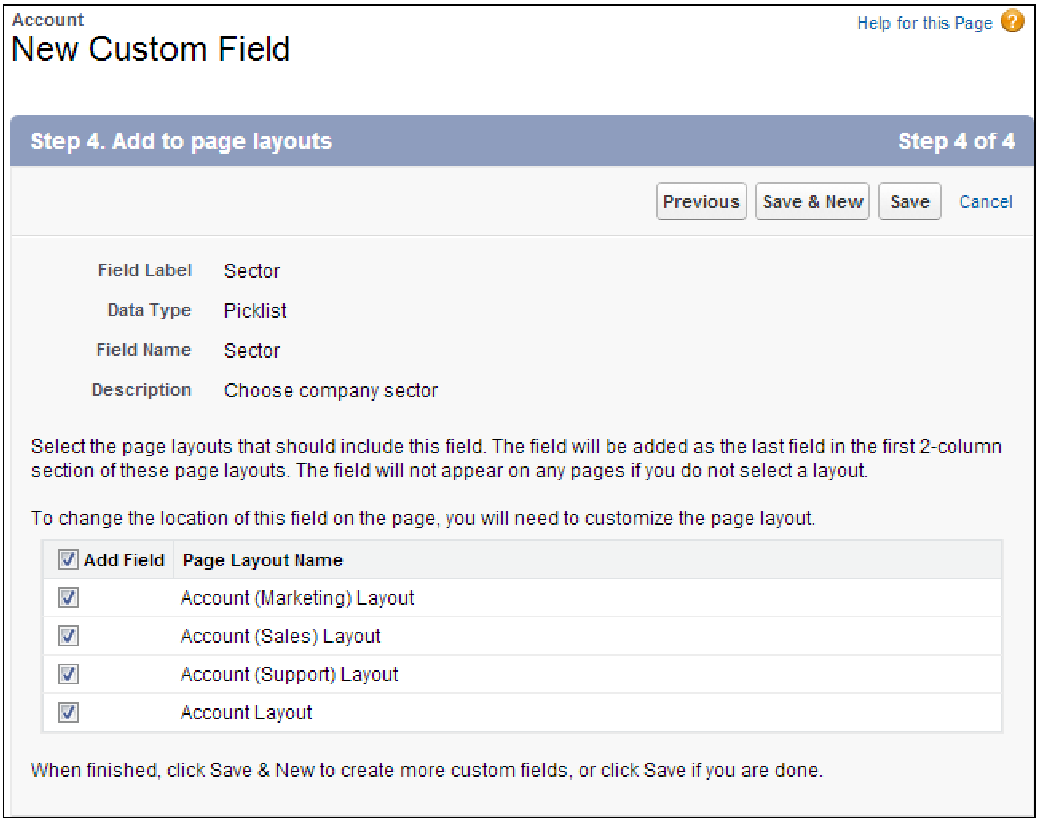
- After you select Field type and define Field parameters you have to setup FLS - Field Level Security for each Profile.
- This means that for each Profile you have to define if Field should be
  - Visible
  - Read-Only
- Checkboxes Visible & Read-Only allows you to select or deselect all of the Profiles at the same time.
- Selecting Read-Only for specific Profile will automatically select Visible checkbox for the same Profile.
  This means that for specific Profile Field can't be Read-Only without being Visible at the same time.



# 2.2.1.5 Step 4. Add to Page Layout

## Info

- After you select Field type, define Field parameters and setup FLS - Field Level Security for each Profile you have to define to which Page Layouts Field will be added.
- By default Field is added to each Page Layout but it can be excluded by unchecking a checkbox.
- Add Field checkbox adds or removes Field from all the Page Layouts by checking or unchecking all the other checkboxes.

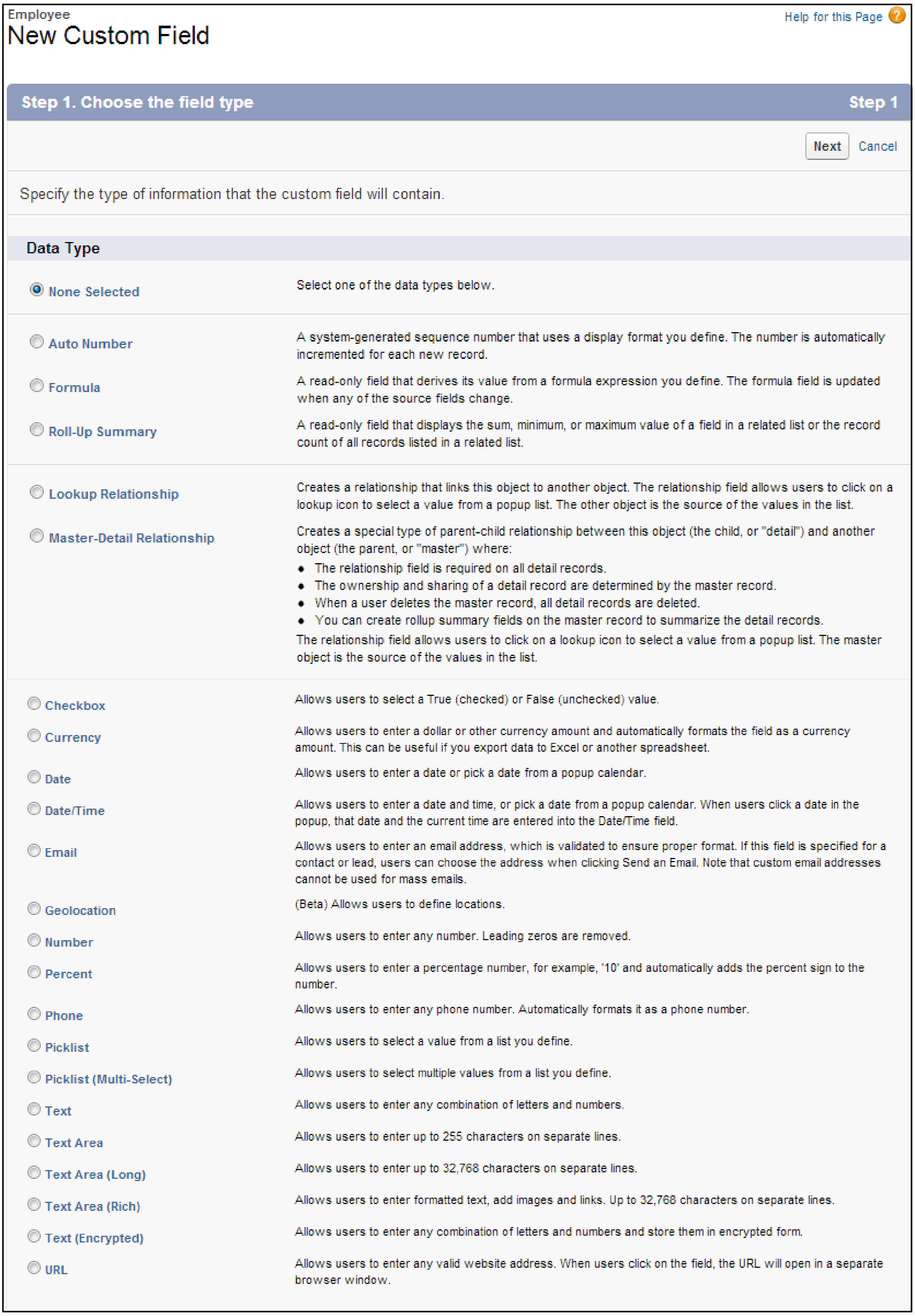


# 2.2.2 Field Types

## Info

- Each of the following chapters describes one of possible field types and how to create it.
- Creating procedure is the same for all field types only except for the step 2 which is used to define field attributes.

*Possible Field Types*



# 2.2.2.1 Auto Number

## Info

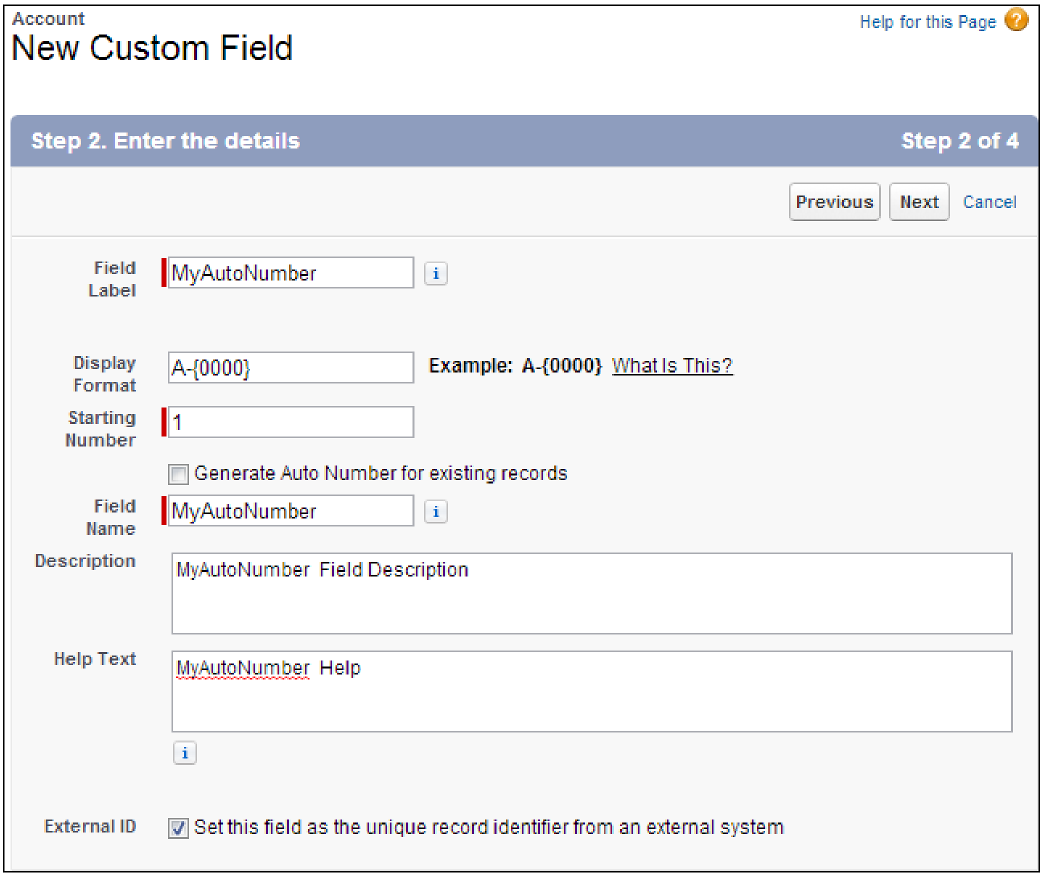
- This chapter shows how to create Auto Number Field.

## Procedure

- Show Object Fields
- Choose Field Type: Auto Number
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyAutoNumber
- Display Format: A-{0000}
- Starting Number: 1
- Generate Auto Number for existing records: UNCHECK
- Field Name: MyAutoNumber
- Description: MyAutoNumber Field Description
- Help Text: MyAutoNumber Help
- External ID: CHECK (Set this field as the unique record identifier from an external system)
- Next



# 2.2.2.2 Formula

## Info

- This chapter shows how to create Formula Field.
- Normal Formula Field calculates values using fields within a single record.
- Cross Object Formula Field can reference fields on parent or grandparent object, up to 5 levels.

## Restrictions

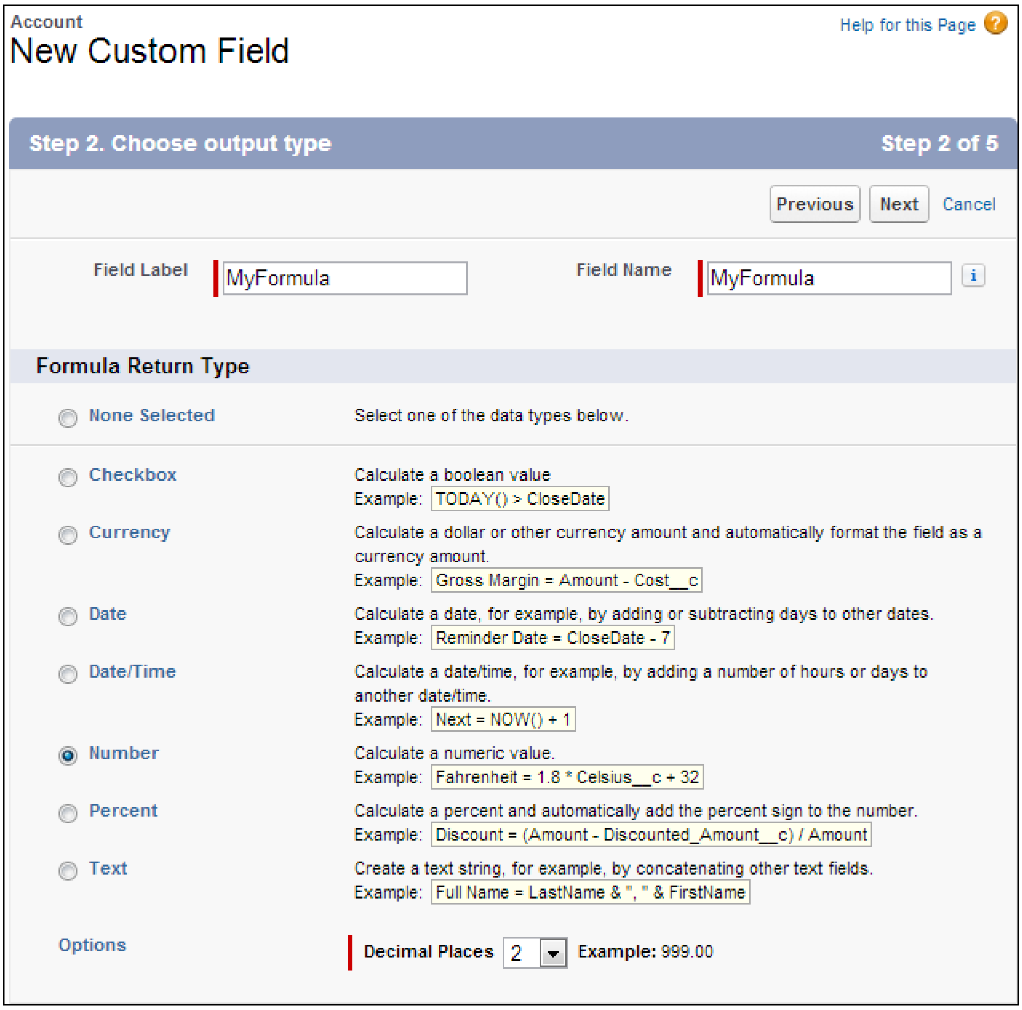
- You can't delete fields used in formulas.
- They ignore field-level security settings of the source fields.

## Procedure

- Show Object Fields
- Choose Field Type: Formula
- Choose output type (As defined below in this chapter)
- Enter formula (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

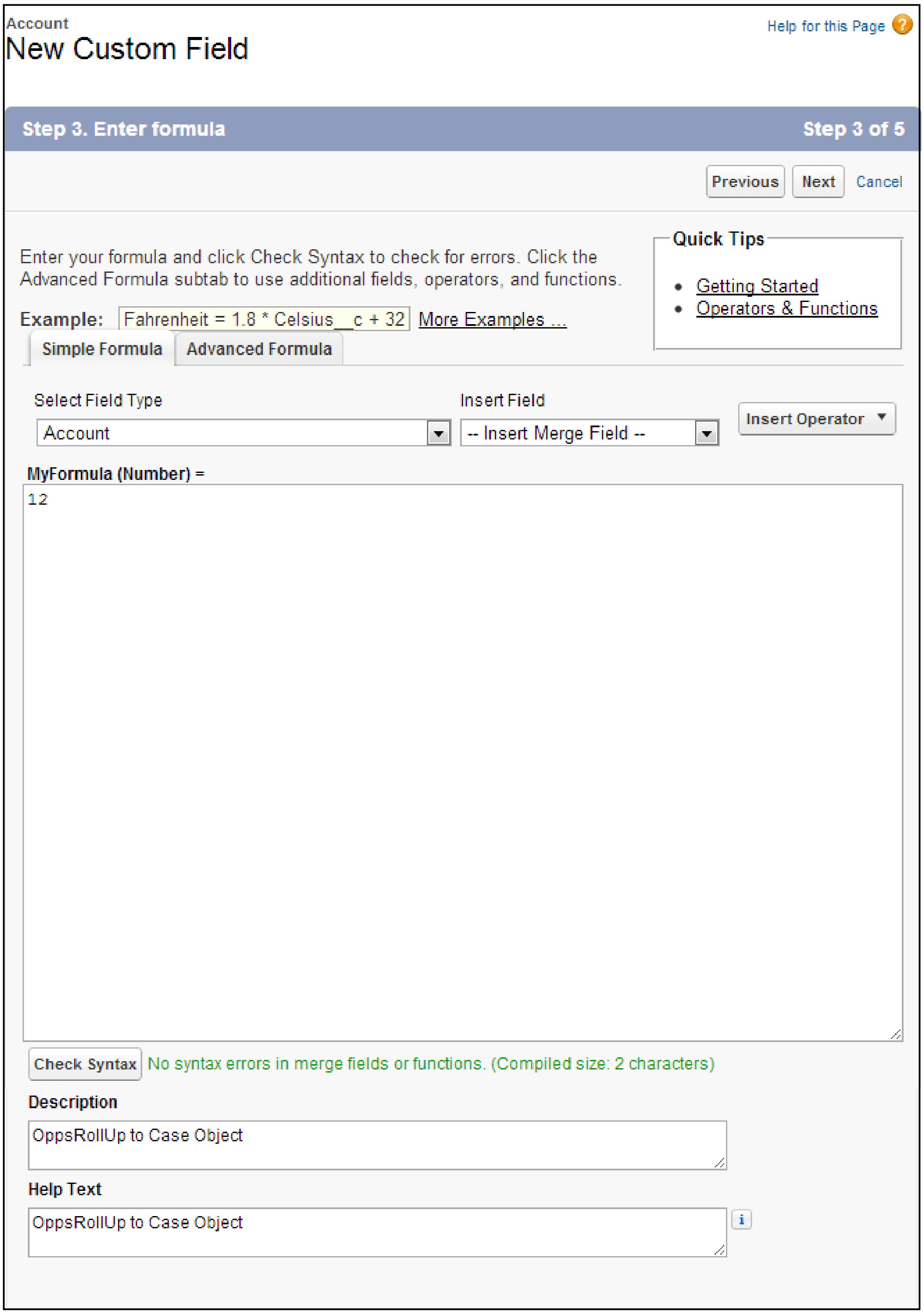
## Choose output type

- Field Label: MyFormula
- Field Name: MyFormula
- Description: MyFormula Field Description
- Help Text: MyFormula Help
- Next



## Enter formula

- MyFormula (Number) = 12 (Constant value is used)
- Description: OppsRollUp to Case Object
- Help Text: OppsRollUp to Case Object
- Next



# 2.2.2.3 Roll-Up Summary

## Info [R]

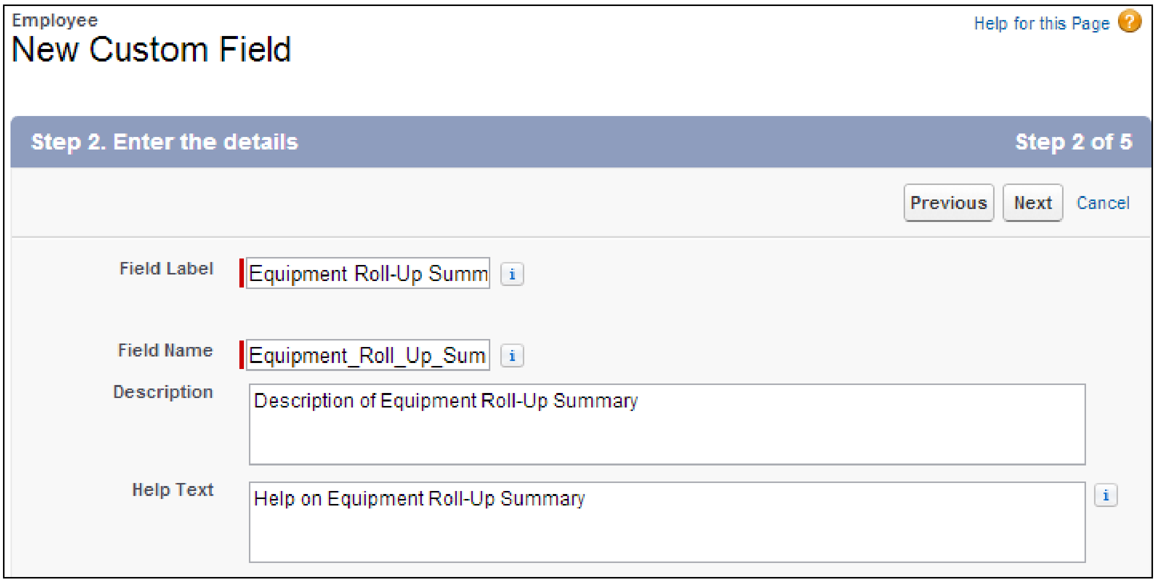
- This chapter shows how to create Roll-Up Summary Field.
- Roll-Up Summary Field calculates values from a set of related child records in a master-detail relationship.
- Roll-Up Summary Field is calculated when the related object record is created or updated.
- A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

## Procedure

- Show Object Fields
- Choose Field Type: Roll-Up Summary
- Enter the details (As defined below in this chapter)
- Define the summary calculation (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

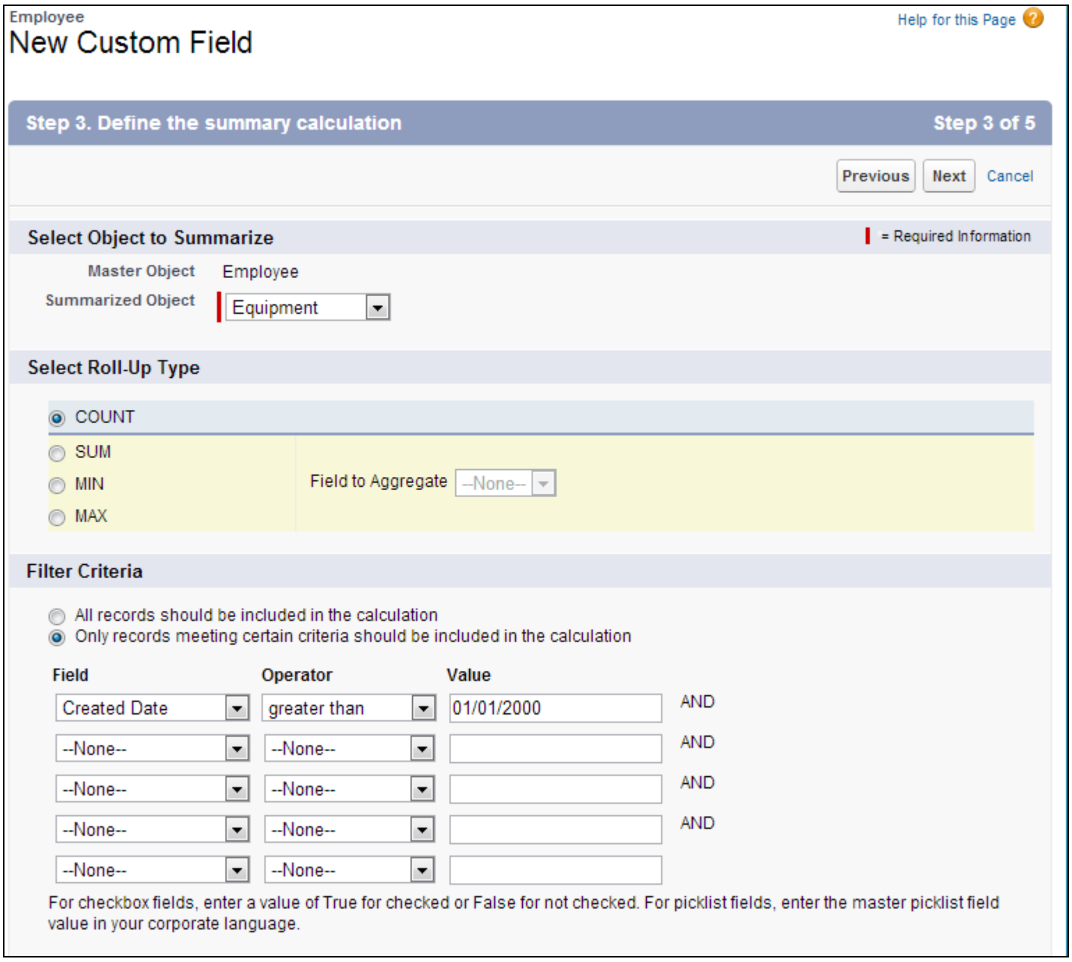
## Enter the details

- Field Label: Equipment Roll-Up Summary
- Field Name: Equipment_Roll_Up_Summary
- Description: Description of Equipment Roll-Up Summary
- Help Text: Help on Equipment Roll-Up Summary
- Next



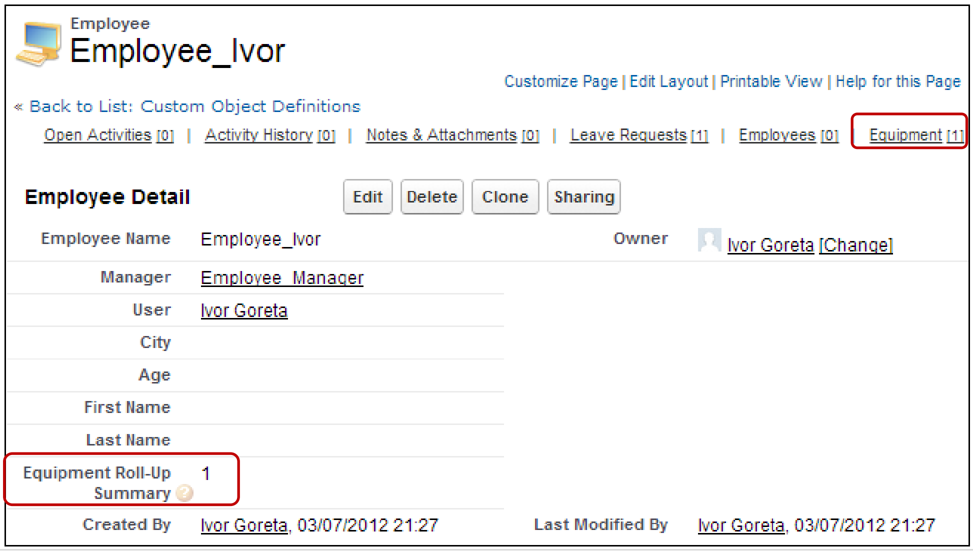
## Define the summary calculation

- Master Object: Equipment
- Summarized Object: Opportunities
- **COUNT: CHECK**
- Field to Aggregate: Amount
- All records should be included in the calculation: UNCHECK
- Only records meeting certain criteria should be included in the calculation: CHECK
- Created Date greater than 01/01/2000
- Next




## Test

- Tab: Employees
- Employee Ivor (Equipment Roll-Up Summary should contain number of equipment referencing this Employee)



# 2.2.2.4 Lookup Relationship

## Info

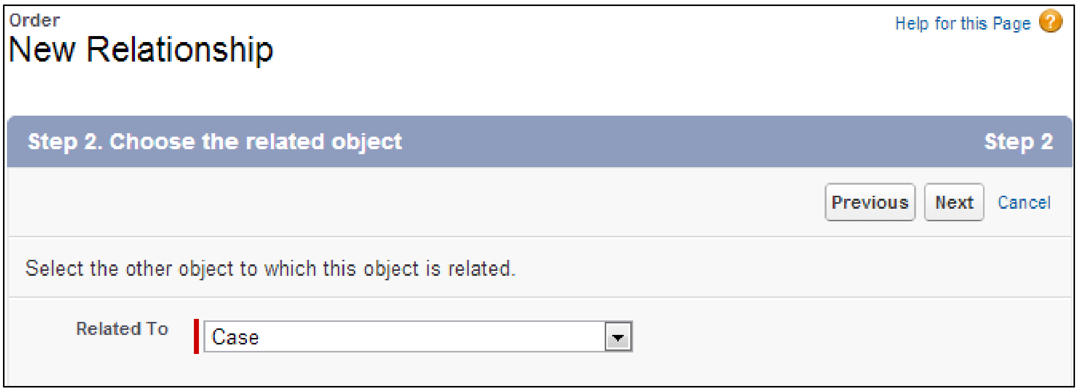
- This chapter shows how to create Lookup Relationship Field.
- Lookup Field is used to reference another record belonging to some specific Object.
- Dependent Lookup:  Use lookup filer that references another field on the same object.

## Procedure

- Show Object Fields
- Choose Field Type: Lookup Relationship
- Choose the related object (As defined below in this chapter)
- Enter the label and name for lookup field (As defined below in this chapter)
- Add custom related lists (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

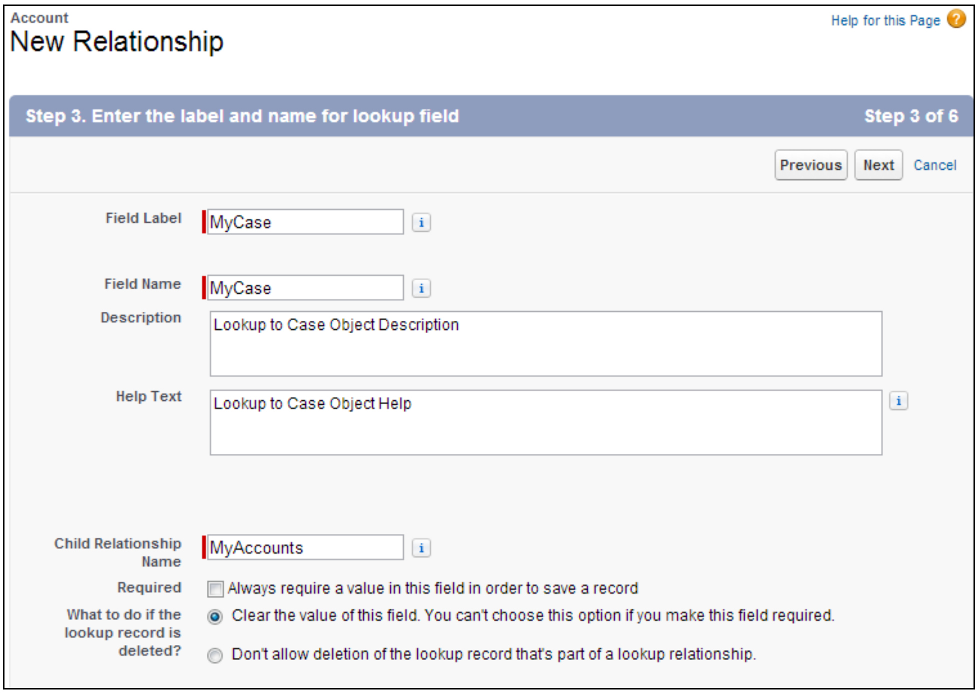
## Choose the related object

- Related To: Case
- Next



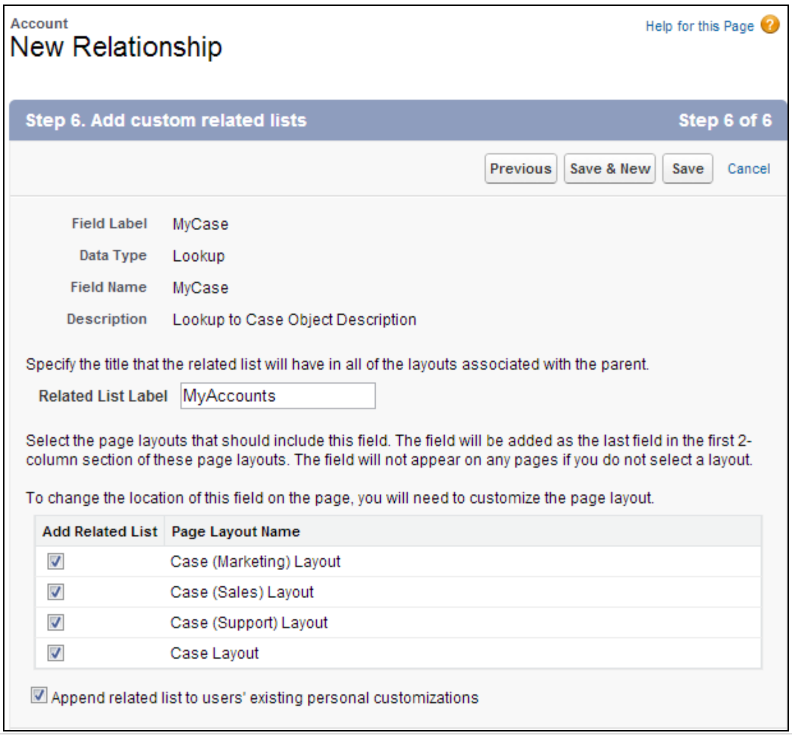
## Enter the label and name for lookup field

- Field Label: MyCase
- Field Name: MyCase
- Description: Lookup to Case Object Description
- Help Text: Lookup to Case Object Help
- Child Relationship Name: MyAccounts
- Required: CHECK (Always require a value in this field in order to save a record)
- What to do if the lookup record is deleted?
  - Clear the value of this field. You can't choose this option if you make this field required.: CHECK
  - Don't allow deletion of the lookup record that's part of a lookup relationship.: UNCHECK
- Next




## Add custom related lists

- Related List Label: MyAccounts
- Save



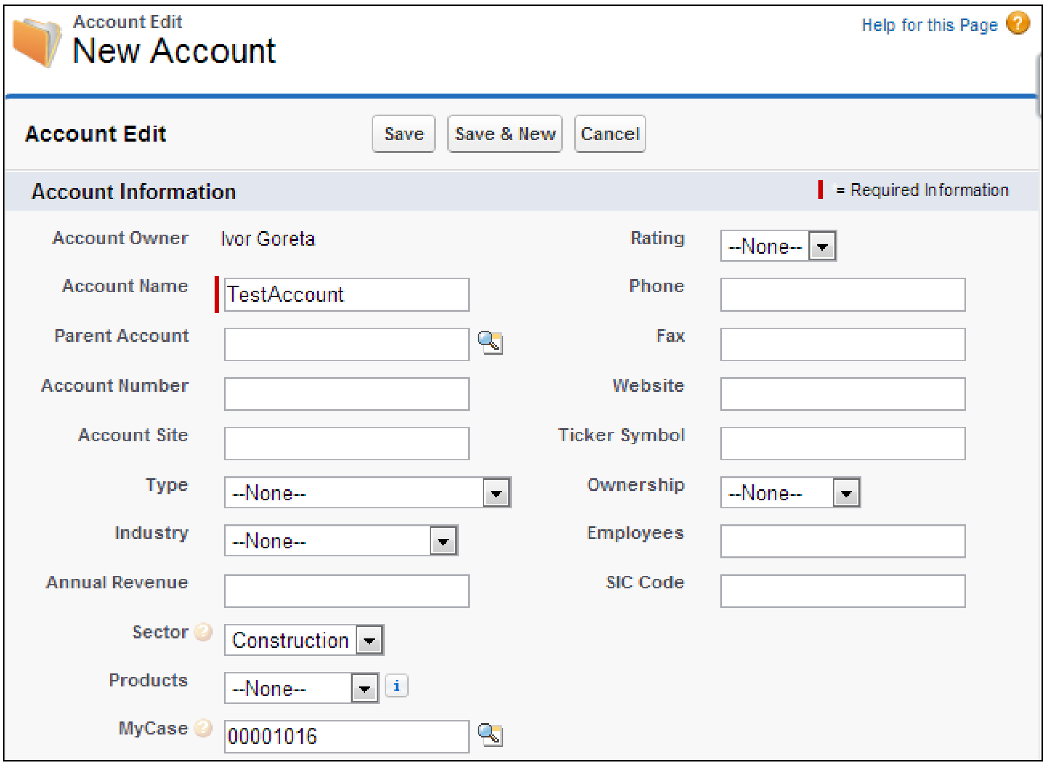
## Test

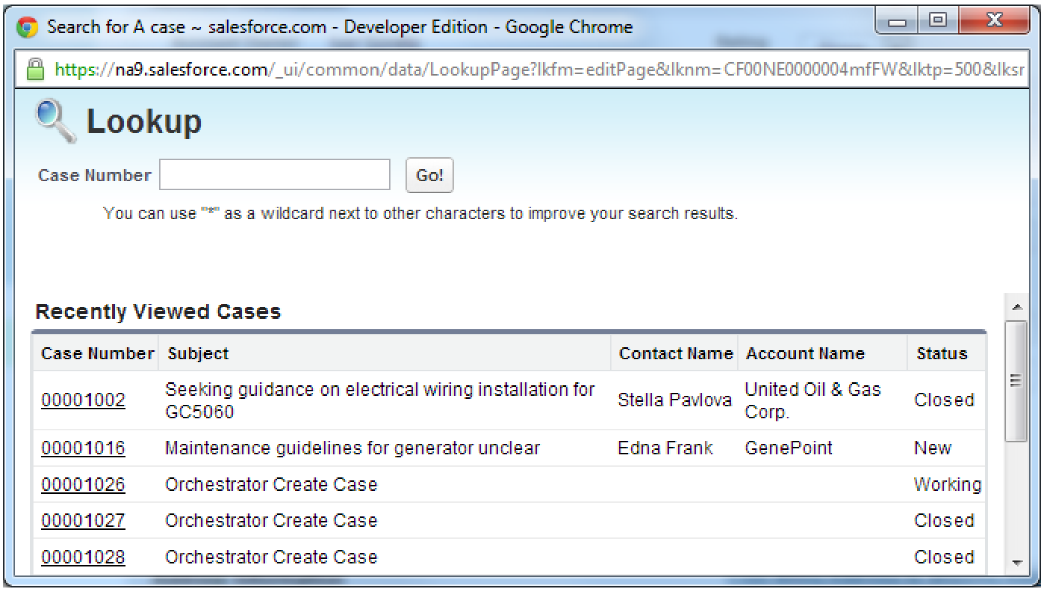
### Create Case

- Tab: Cases
- New
- Record Type of new record: Default
- Continue
- Contact Name: Ivor Online
- Case Origin: Phone
- Save

### Create Account

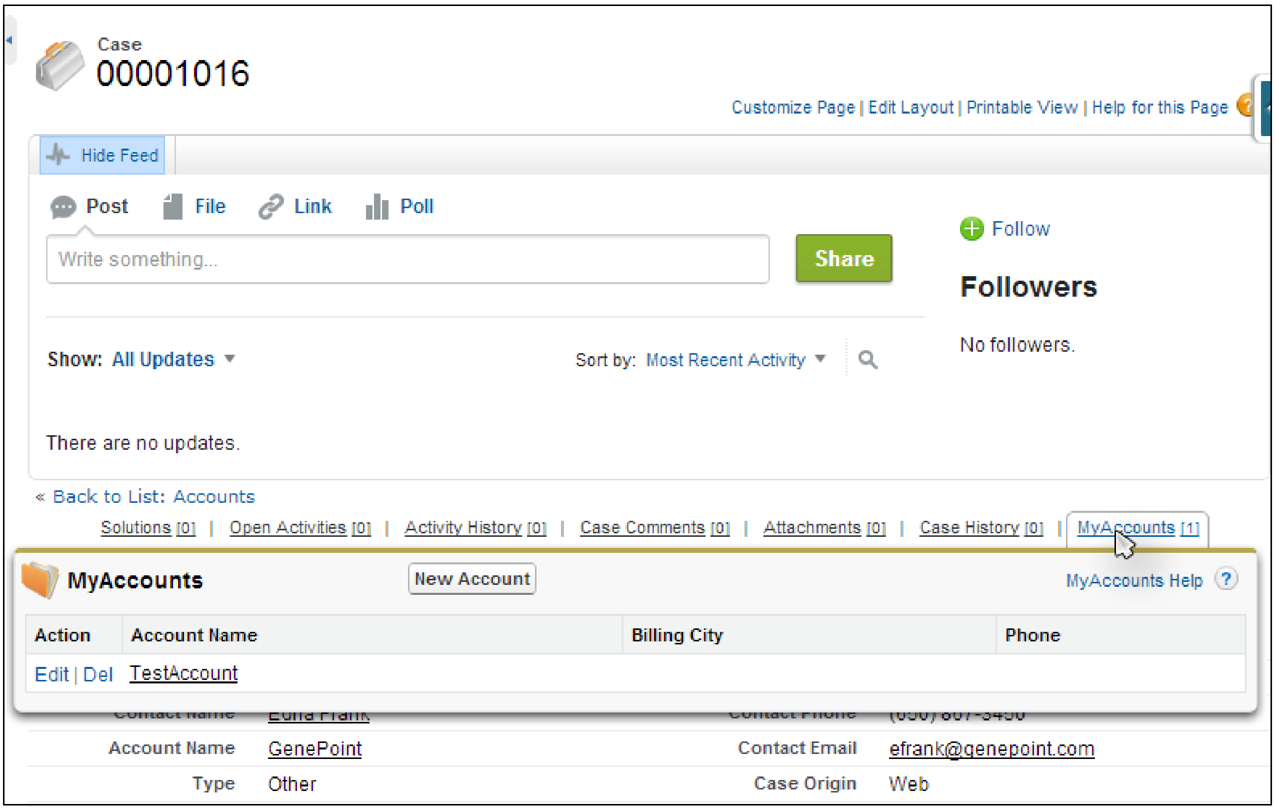
- Tab: Accounts
- New
- Account Name: TestAccount
- MyCase: 00001016
- Save

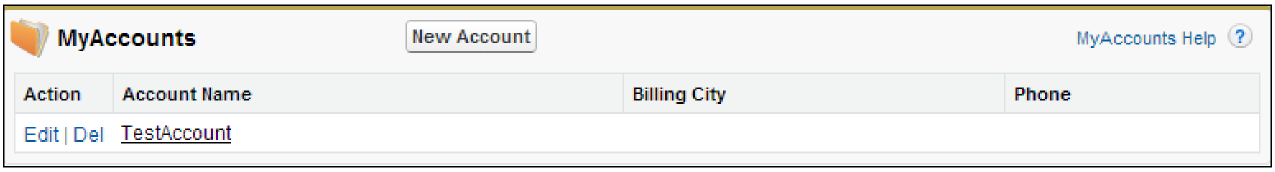


**Show Accounts referencing specific Case record**

- Tab: Cases
- 00001016
- (Hover over link to related list MyAccounts to show popup with all the Accounts referencing this Case Record)
- (Click on a link to related list MyAccounts to get to the list of Accounts referencing this Case Record)



# 2.2.2.5 Master-Detail Relationship

## Info

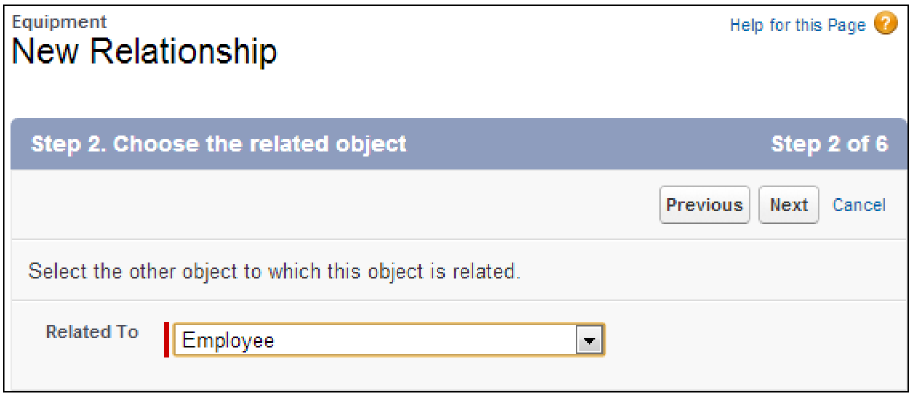
- This chapter shows how to create Master-Detail Relationship Field.
- Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.
- The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

## Procedure

- Show Object Fields
- Choose Field Type: Master-Detail Relationship
- Choose the related object (As defined below in this chapter)
- Enter the label and name for lookup field (As defined below in this chapter)
- Add custom related lists (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

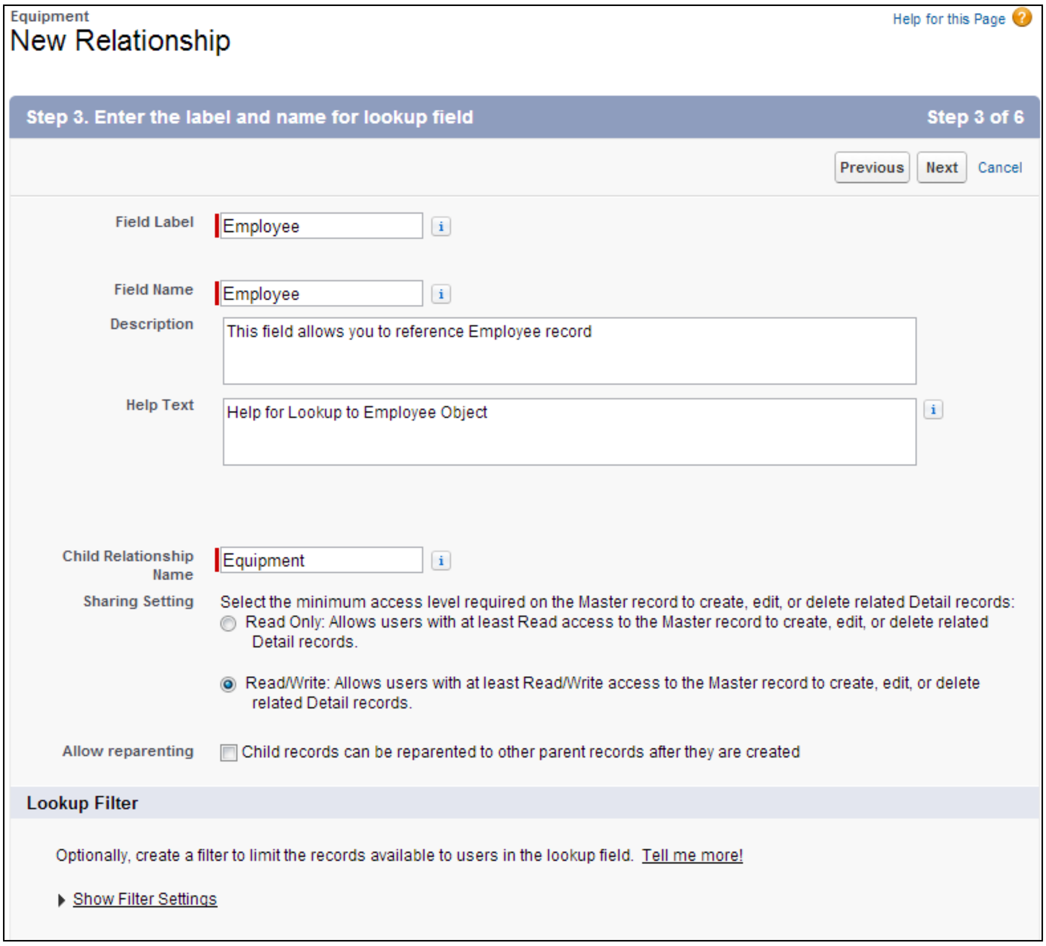
## Choose the related object

- Related To: Employee
- Next



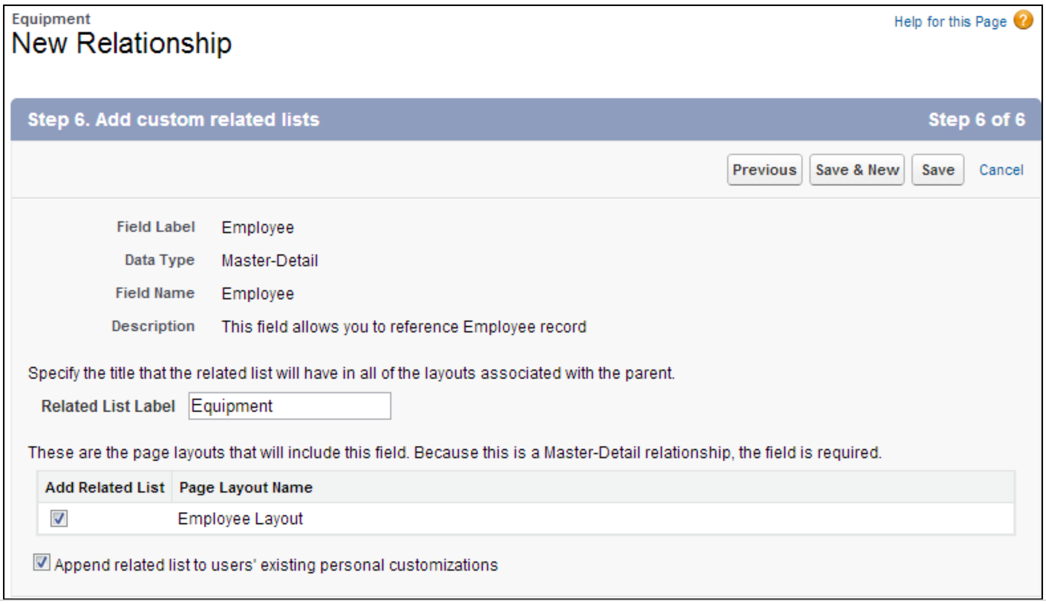
## Enter the label and name for lookup field

- Field Label: Employee
- Field Name: Employee
- Description: This field allows you to reference Employee record
- Help Text: Help for Lookup to Employee Object
- Child Relationship Name: Equipment
- Sharing Setting: Read/Write
- Next




## Add custom related lists

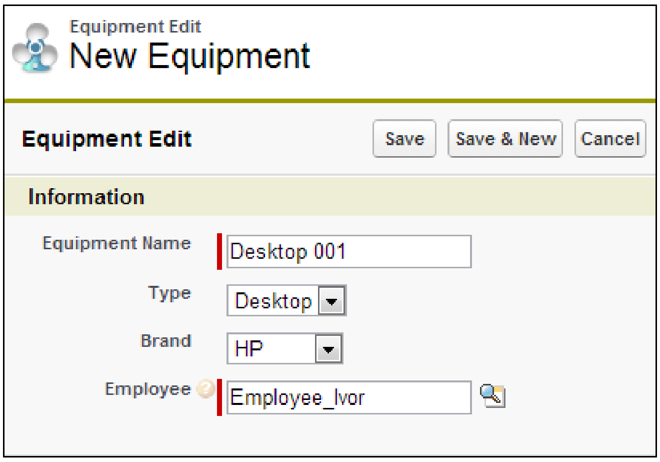
- Related List Label: Equipment
- Save



## Test

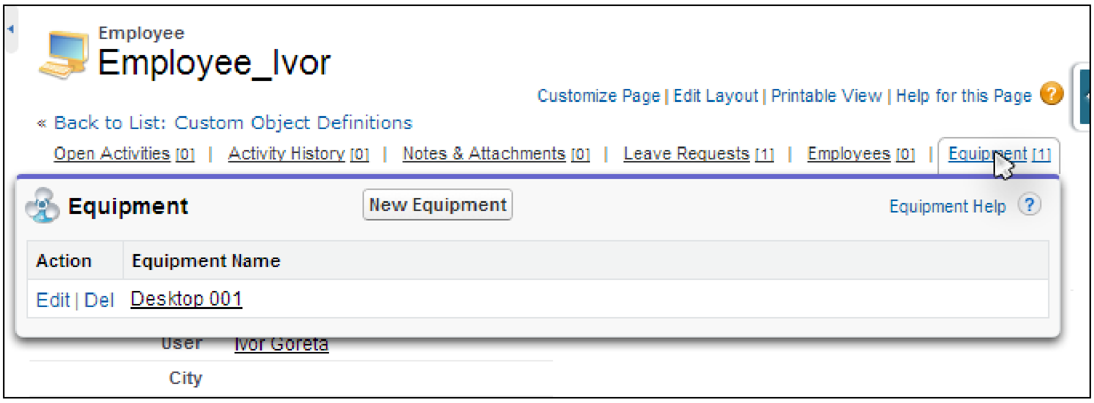
### Create Equipment Record

- Tab: Equipment
- New
- Equipment Name: Desktop 001
- Type: Desktop
- Brand HP
- Employee: Employee_Ivor
- Save




### Check Employee Record

- Tab: Employees
- Employee_Ivor
- (Hover over link to related list Equipment to show popup with all the Equipment referencing this Employee Record)
- (Click on a link to related list MyAccounts to get to the list of Accounts referencing this Case Record)




# 2.2.2.6 Checkbox

## Info

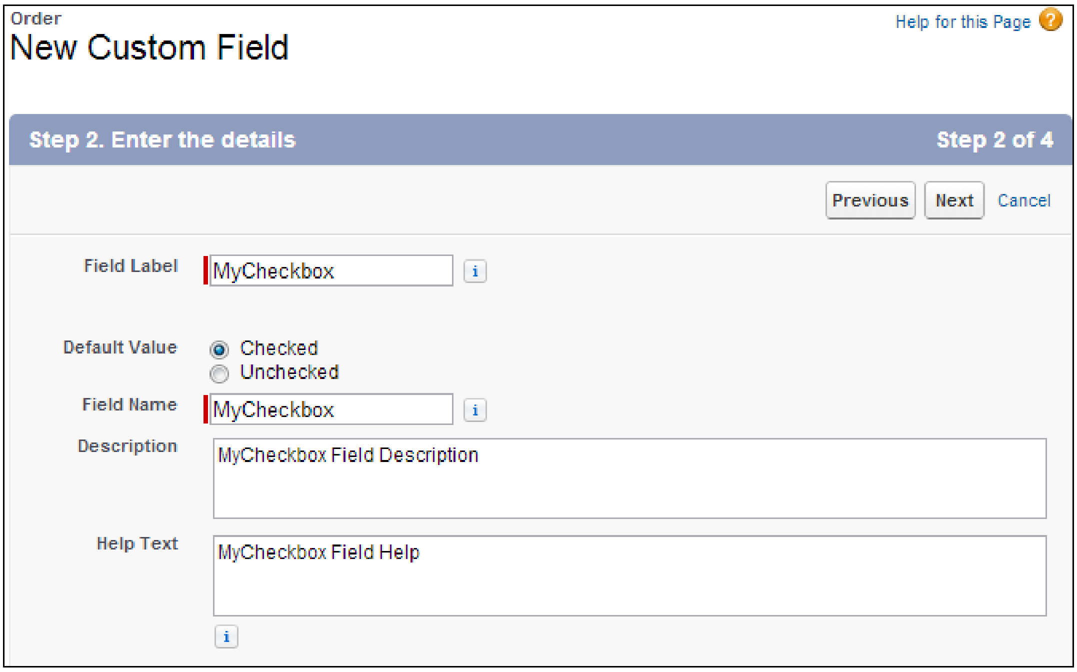
- This chapter shows how to create Checkbox Field.

## Procedure

- Show Object Fields
- Choose Field Type: Checkbox
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyCheckbox
- Default Value: Checked
- Field Name: MyCheckbox
- Description: MyCheckbox Field Description
- Help Text: MyCheckbox Field Help
- Next



# 2.2.2.7 Currency

## Info

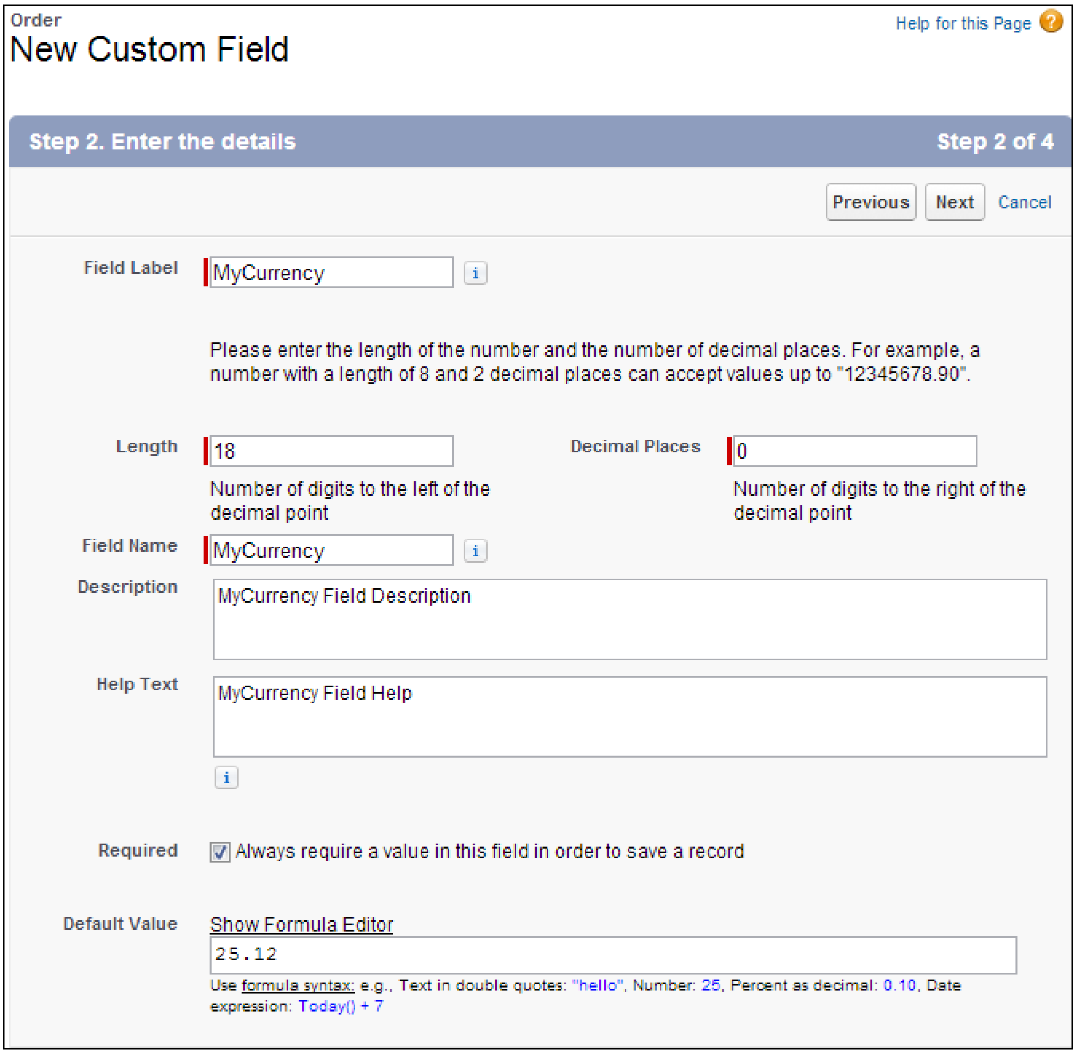
- This chapter shows how to create Currency Field.

## Procedure

- Show Object Fields
- Choose Field Type: Currency
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyCurrency
- Length: 18 (Number of digits to the left of the decimal point)
- Decimal Places: 0 (Number of digits to the right of the decimal point)
- Field Name: MyCurrency
- Description: MyCurrency Field Description
- Help Text: MyCurrency Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: 25.12 (Supports formula)
- Next



# 2.2.2.8 Date

## Info

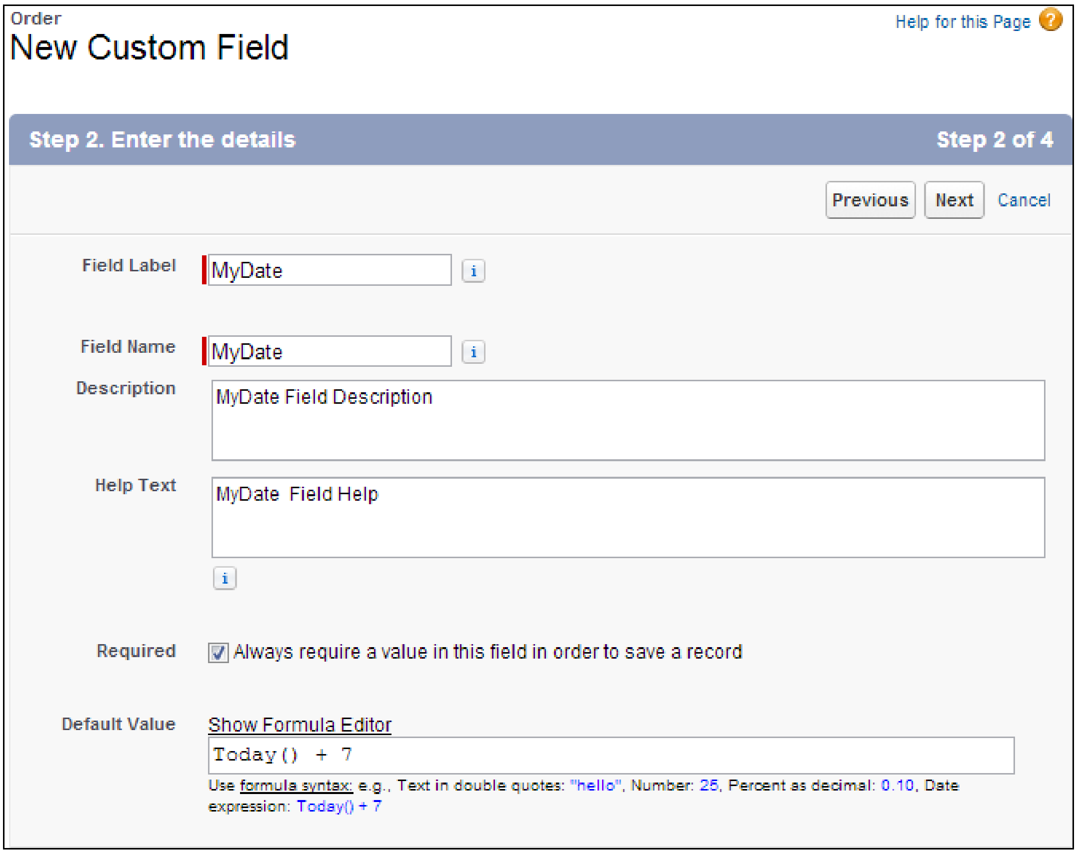
- This chapter shows how to create Date Field.

## Procedure

- Show Object Fields
- Choose Field Type: Date
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyDate
- Field Name: MyDate
- Description: MyDate Field Description
- Help Text: MyDate Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: Today() + 7 (Supports formula)
- Next



# 2.2.2.9 Date/Time

### Info

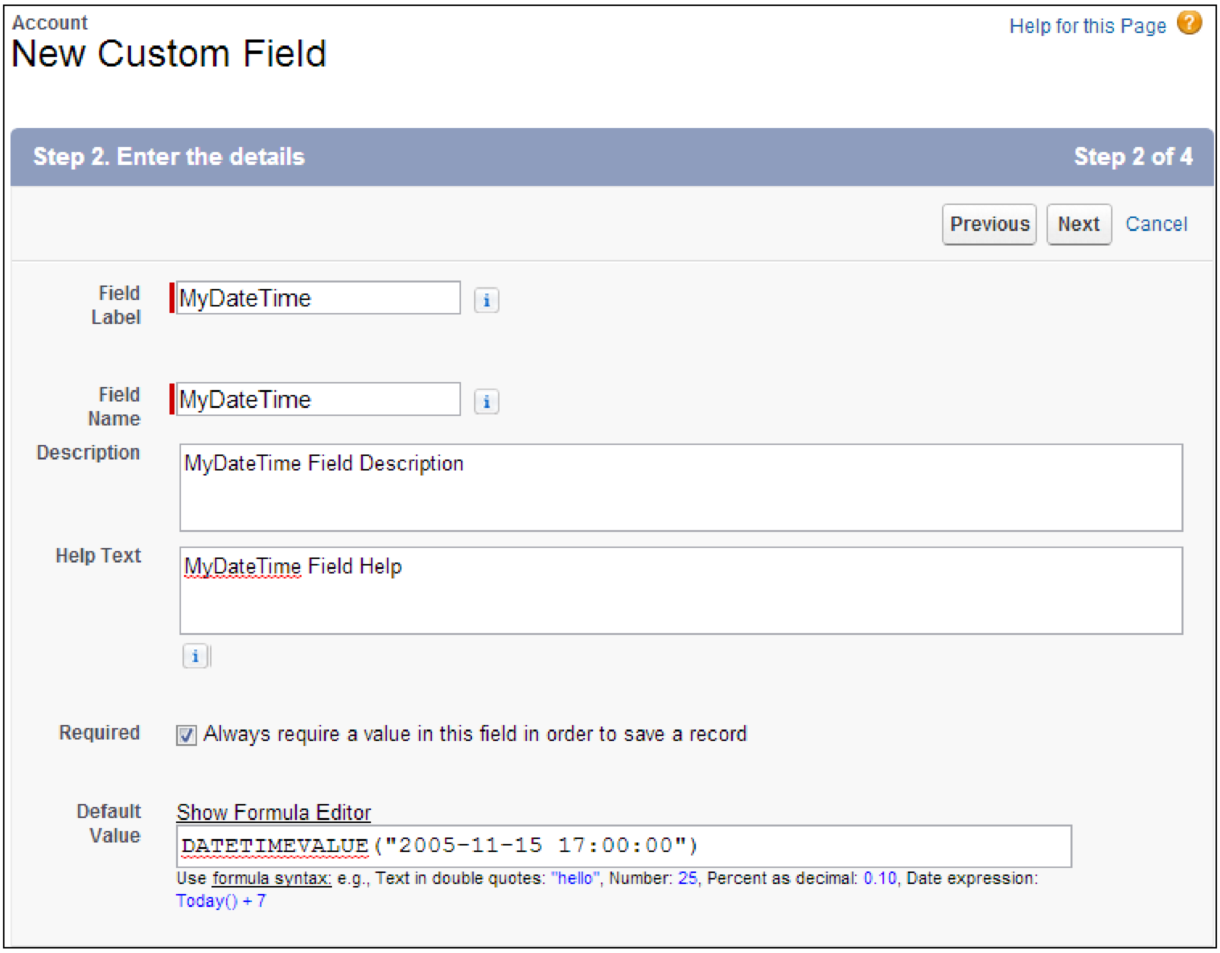
- This chapter shows how to create Date/Time Field.

### Procedure

- Show Object Fields
- Choose Field Type: Date/Time
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

### Enter the details

- Field Label: MyDateTime
- Field Name: MyDateTime
- Description: MyDateTime Field Description
- Help Text: MyDateTime Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: DATETIMEVALUE("2005-11-15 17:00:00") (Supports formula)
- Next



# 2.2.2.10 Email

## Info

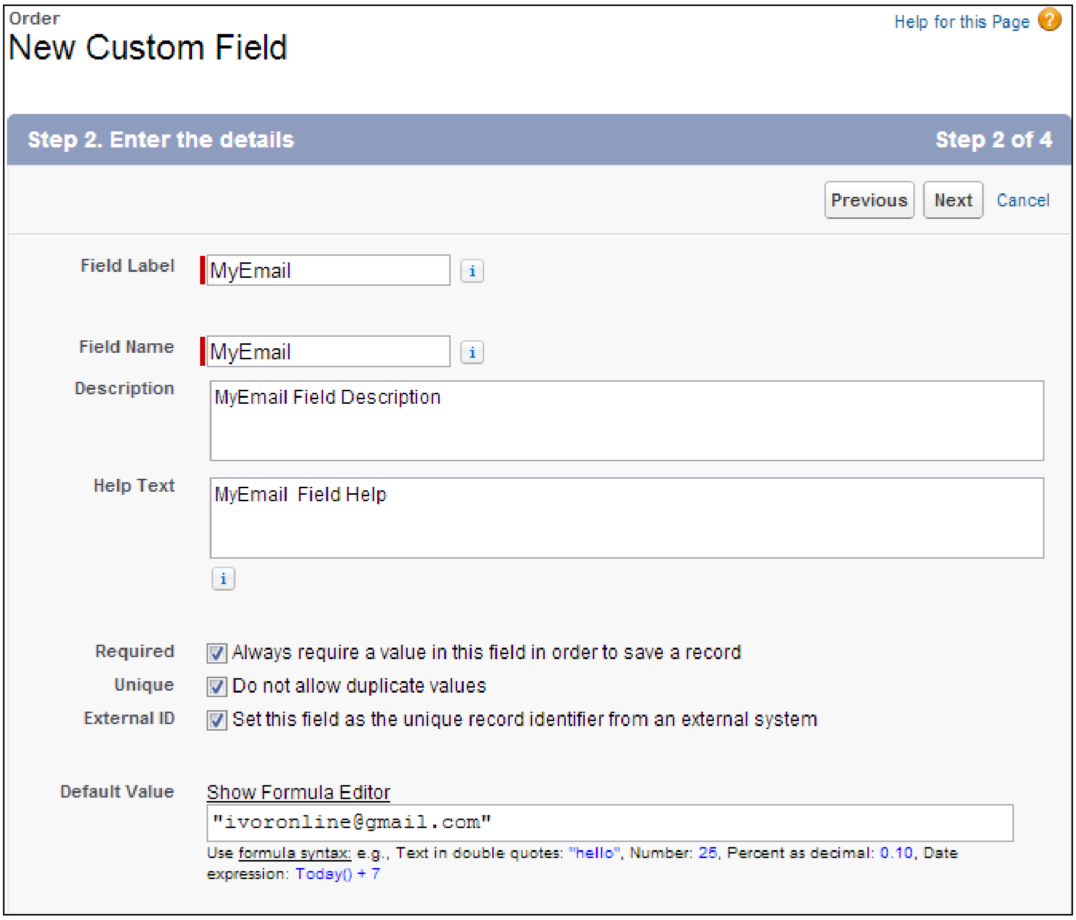
- This chapter shows how to create Email Field.

## Procedure

- Show Object Fields
- Choose Field Type: Email
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyEmail
- Latitude and Longitude Display Notation: Degrees, Minutes, Seconds
- Decimal Places: 0 (Number of digits to the right of the decimal point)
- Field Name: MyEmail
- Description: MyEmail Field Description
- Help Text: MyEmail Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Unique: CHECK (Do not allow duplicate values)
- External ID: CHECK (Set this field as the unique record identifier from an external system)
- Default Value: "ivoronline@gmail.com" (Supports formula)
- Next



# 2.2.2.11 Geolocation

## Info

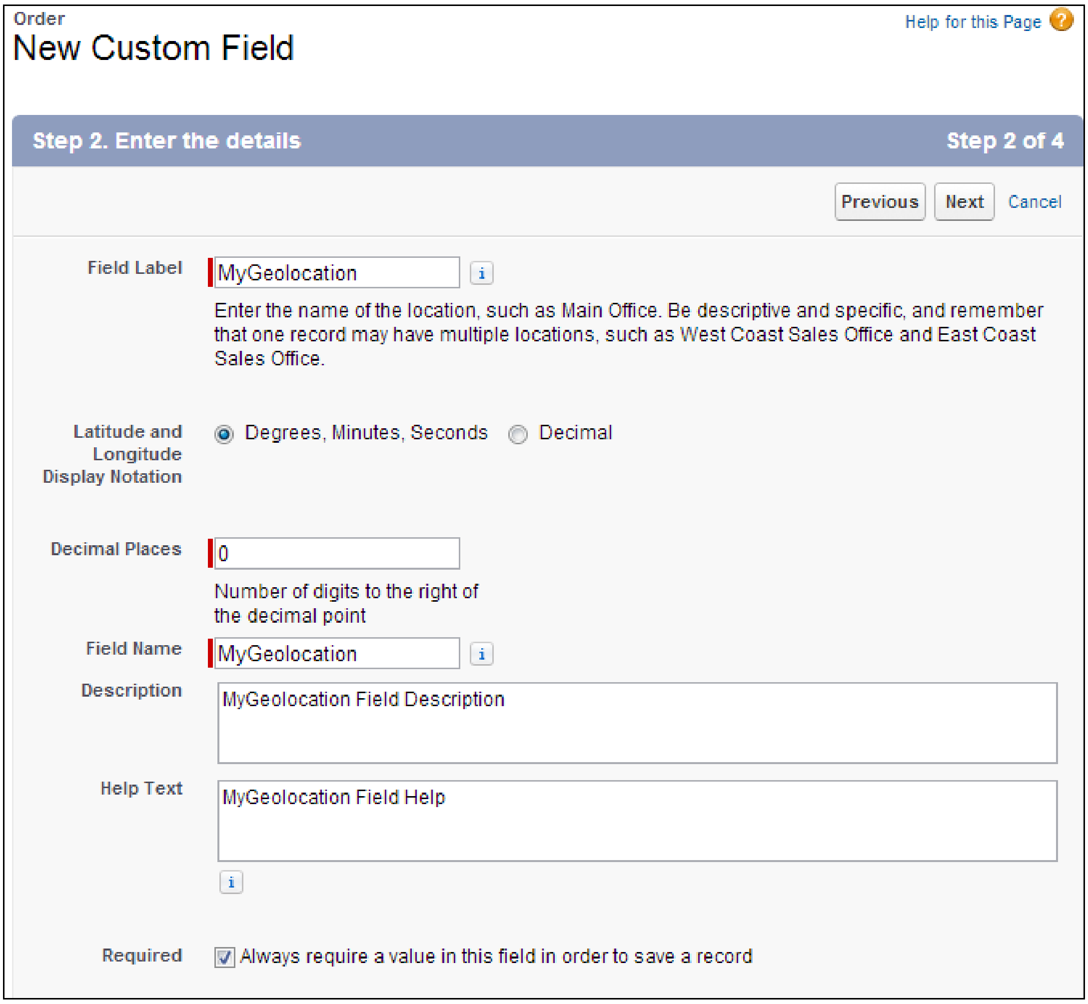
- This chapter shows how to create Geolocation Field.

## Procedure

- Show Object Fields
- Choose Field Type: Geolocation
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyGeolocation
- Latitude and Longitude Display Notation: Degrees, Minutes, Seconds
- Decimal Places: 0 (Number of digits to the right of the decimal point)
- Field Name: MyGeolocation
- Description: MyGeolocation Field Description
- Help Text: MyGeolocation Field Help
- Next



# 2.2.2.12 Number

## Info

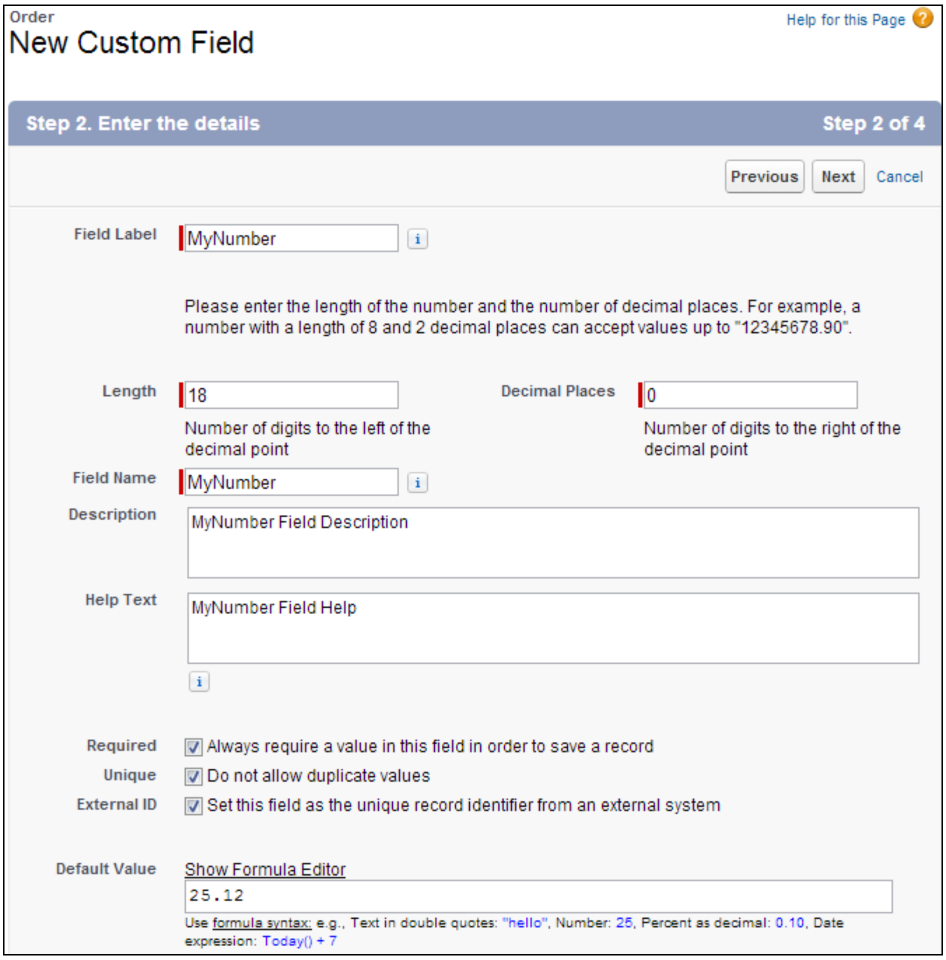
- This chapter shows how to create Number Field.

## Procedure

- Show Object Fields
- Choose Field Type: Number
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyNumber
- Length: 18 (Number of digits to the left of the decimal point)
- Decimal Places: 0 (Number of digits to the right of the decimal point)
- Field Name: MyNumber
- Description: MyNumber Field Description
- Help Text: MyNumber Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Unique: CHECK (Do not allow duplicate values)
- External ID: CHECK (Set this field as the unique record identifier from an external system)
- Default Value: 25.12 (Supports formula)
- Next



# 2.2.2.13 Percent

## Info

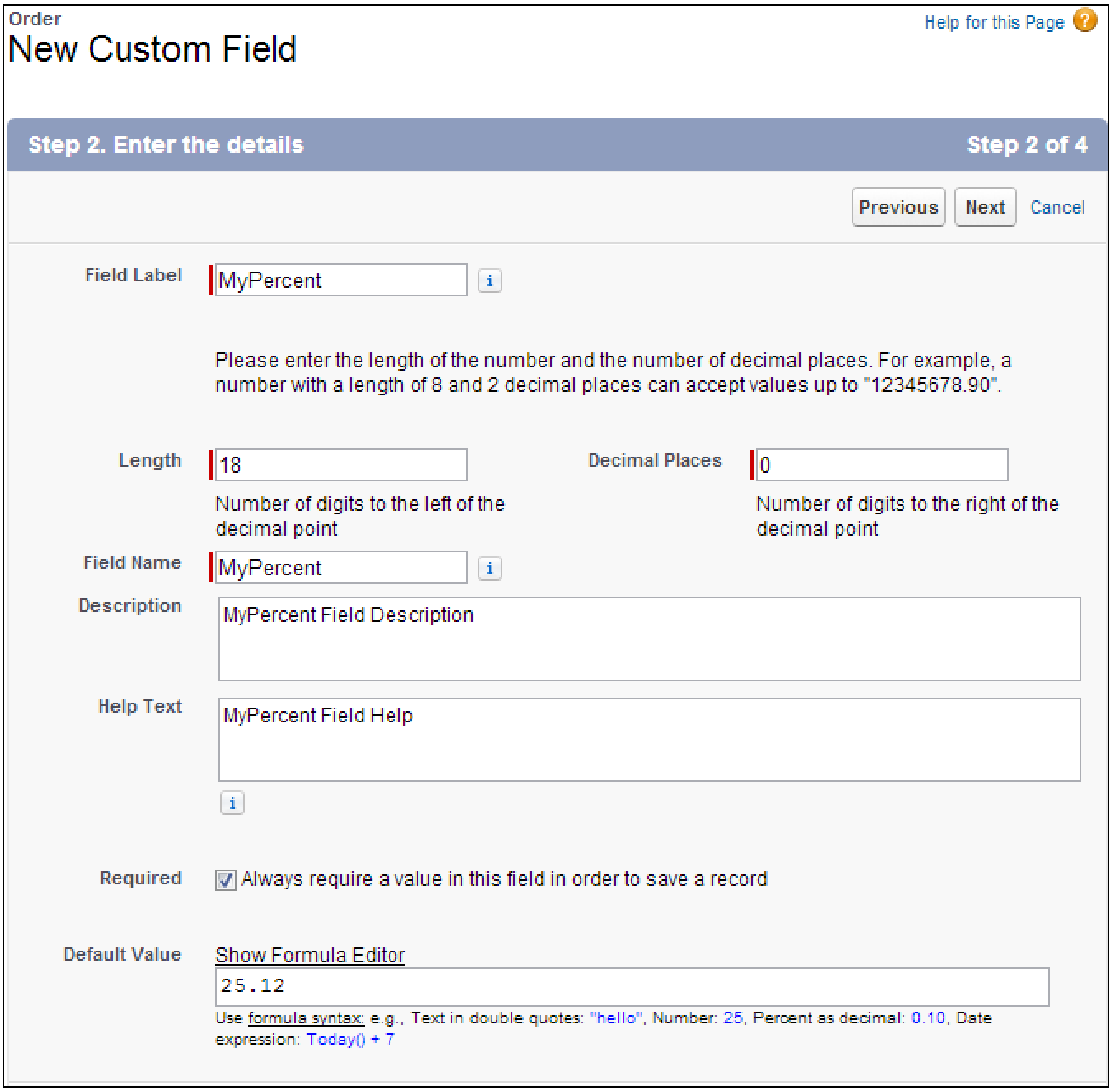
- This chapter shows how to create Percent Field.

## Procedure

- Show Object Fields
- Choose Field Type: Percent
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyPercent
- Length: 18 (Number of digits to the left of the decimal point)
- Decimal Places: 0 (Number of digits to the right of the decimal point)
- Field Name: MyPercent
- Description: MyPercent Field Description
- Help Text: MyPercent Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: 25.12 (Supports formula)
- Next



# 2.2.2.14 Phone

## Info

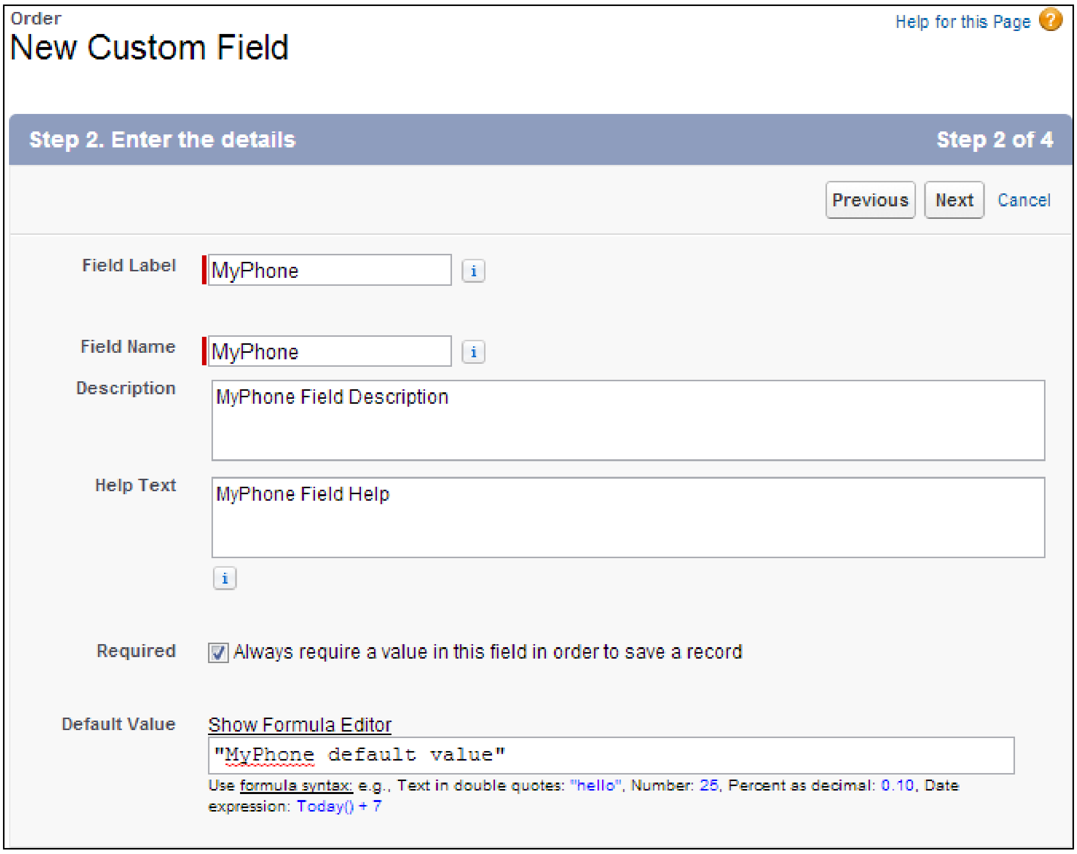
- This chapter shows how to create Phone Field.

## Procedure

- Show Object Fields
- Choose Field Type: Phone
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyPhone
- Field Name: MyPhone
- Description: MyPhone Field Description
- Help Text: MyPhone Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: "MyPhone default value" (Supports formula)
- Next



# 2.2.2.15 Picklist

## Info

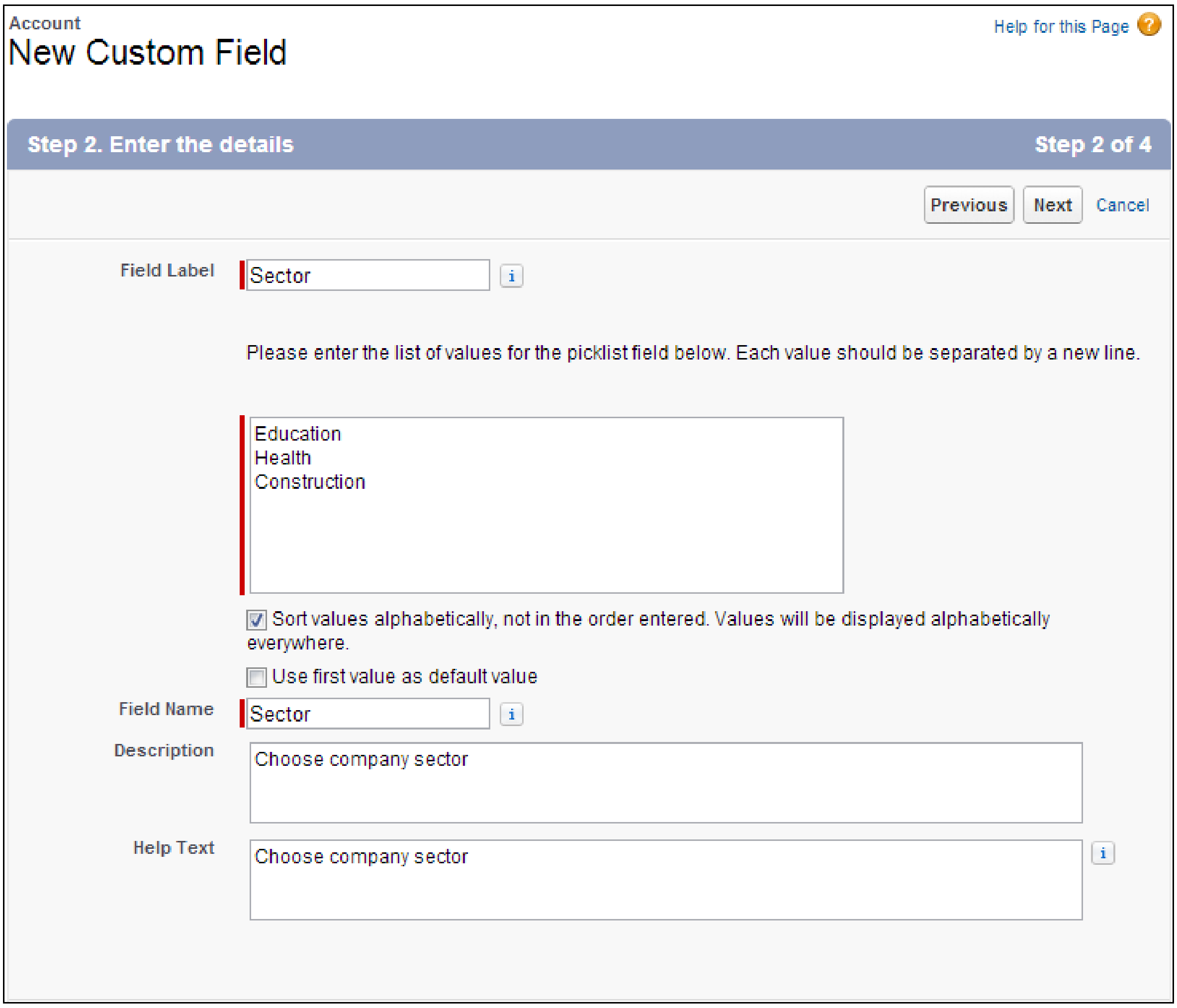
- This chapter shows how to create Picklist Field.
- Picklist values are entered delimited by a new line.

## Procedure

- Show Object Fields
- Choose Field Type: Picklist
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: Sector
- Please enter the list of values for the picklist field below. Each value should be separated by a new line.
- Education
- Health
- Construction
- Sort values alphabetically, not in the order entered: CHECK
- Use first value as default value: CHECK
- Field Name: Sector
- Description: Choose company sector
- Help Text: Choose company sector
- Next



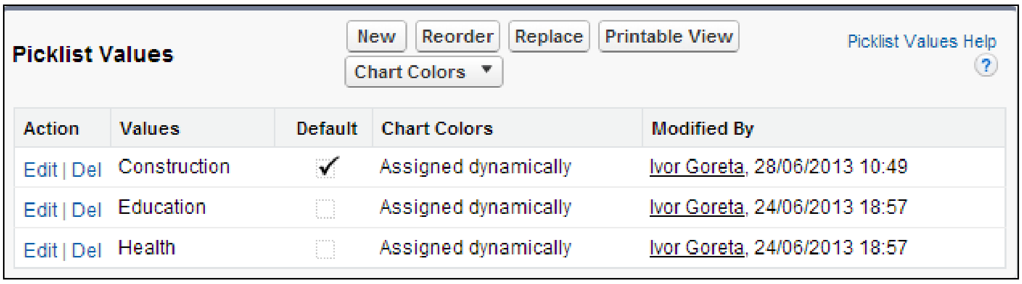
# 2.2.2.15.1 Define default picklist value

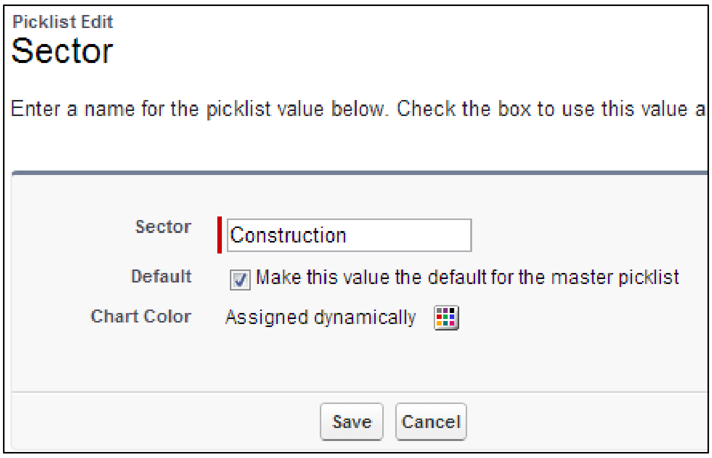
### Info

- During picklist creation you can only select if you want first value to be default.
- Only after picklist is created you can define if you want some other value to be default.

### Choose default value

- (Select picklist field)
- Section: Picklist Values
- (Click on Edit next to value you want to make default)
- Default: CHECK (Make this value the default for the master picklist)
- Save

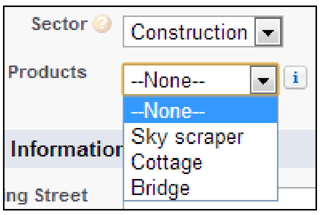


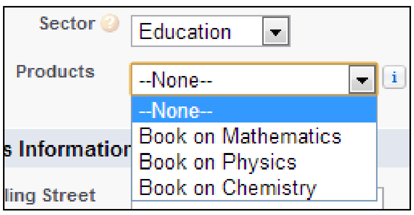



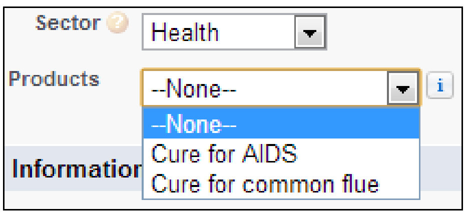

# 2.2.2.15.2 Create Dependent picklist

### Info [R]

- This chapter shows how to create dependency between two picklist.
- Dependent picklists are called Controlling and Depended picklist.
- Values that can be chosen in Depended picklist will depend on the value chosen in Controlling picklist.
- In this example Controlling picklist is Sector and Depended picklist is Products.




### Restrictions

- Depended picklist can't have default value. (You can define it but it will be ignored)

## Create Controlling Picklist

**Select picklist type**

- Show Object Fields
- Choose Field Type: Picklist

**Define Picklist Values**

- Field Label: Sector
- Please enter the list of values for the picklist field below. Each value should be separated by a new line.
  Education
  Health
  Construction
- Sort values alphabetically, not in the order entered: CHECK
- Use first value as default value: CHECK
- Field Name: Sector
- Description: Choose company sector
- Help Text: Choose company sector
- Next

**Define FLS & Page Layout**

- Establish field-level security
- Add to Page Layout

## Create Depended Picklist

**Select picklist type**

- Show Object Fields
- Choose Field Type: Picklist

**Define Picklist Values**

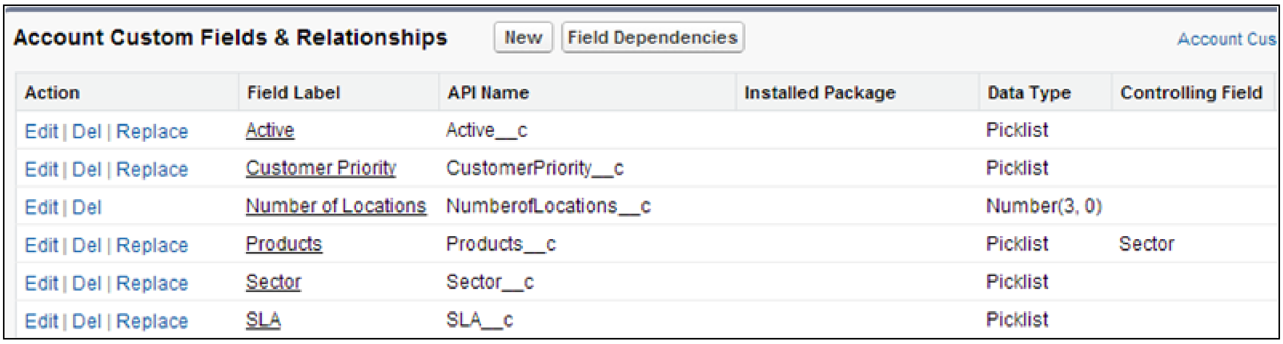
- Field Label: Products
- Please enter the list of values for the picklist field below. Each value should be separated by a new line.
  Book on Mathematics
  Book on Physics
  Book on Chemistry
  Cure for AIDS
  Cure for common flue
  Sky scraper
  Cottage
  Bridge
- Sort values alphabetically, not in the order entered: CHECK
- Use first value as default value: CHECK
- Field Name: Sector
- Description: Choose company sector
- Help Text: Choose company sector
- Next

**Define FLS & Page Layout**

- Establish field-level security
- Add to Page Layout

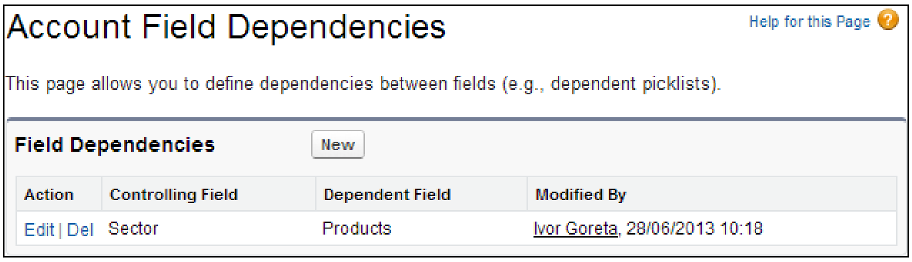
## Define Dependencies

- Section: Account Custom Fields & Relationships
- Field Dependencies
- New
- Continue
- Controlling Field: Sector
- Dependent Field: Products
- Continue
- (Select specific cells to define relationships between picklist values)
- Save



Account Custom Fields & Relationships   New   Field Dependencies   Account Cus

| Action | Field Label | API Name | Installed Package | Data Type | Controlling Field |
|---|---|---|---|---|---|
| Edit \| Del \| Replace | Active | Active__c | | Picklist | |
| Edit \| Del \| Replace | Customer Priority | CustomerPriority__c | | Picklist | |
| Edit \| Del | Number of Locations | NumberofLocations__c | | Number(3, 0) | |
| Edit \| Del \| Replace | Products | Products__c | | Picklist | Sector |
| Edit \| Del \| Replace | Sector | Sector__c | | Picklist | |
| Edit \| Del \| Replace | SLA | SLA__c | | Picklist | |

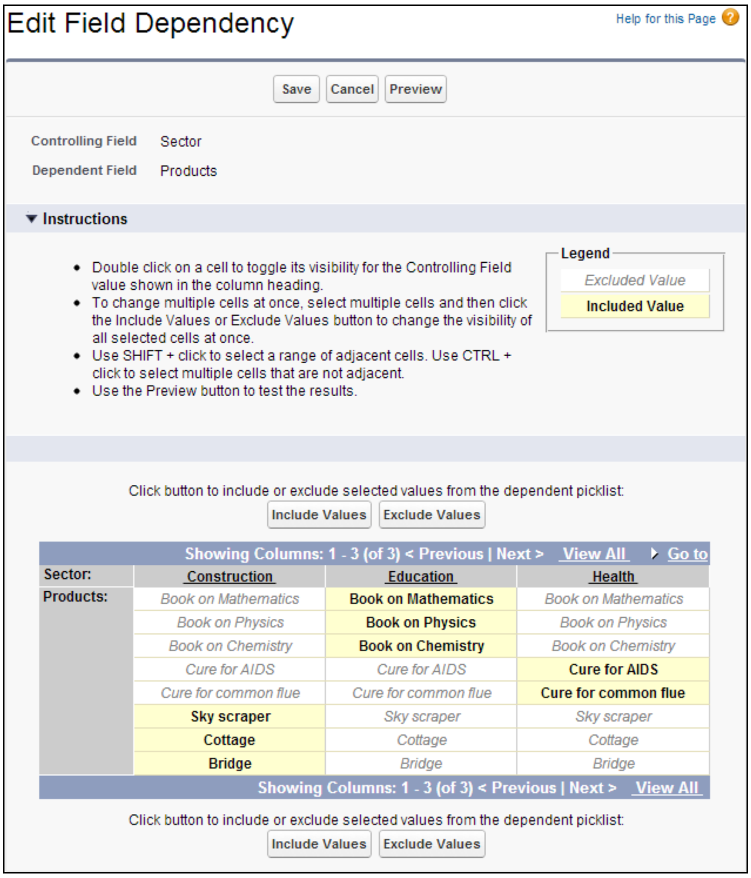


Account Field Dependencies   Help for this Page

This page allows you to define dependencies between fields (e.g., dependent picklists).

Field Dependencies   New

| Action | Controlling Field | Dependent Field | Modified By |
|---|---|---|---|
| Edit \| Del | Sector | Products | Ivor Goreta, 28/06/2013 10:18 |



Edit Field Dependency   Help for this Page

Save   Cancel   Preview

Controlling Field   Sector
Dependent Field   Products

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend
Excluded Value
Included Value

Click button to include or exclude selected values from the dependent picklist:
Include Values   Exclude Values

Showing Columns: 1 - 3 (of 3) < Previous | Next >   View All   Go to

| Sector: | Construction | Education | Health |
|---|---|---|---|
| Products: | Book on Mathematics | Book on Mathematics | Book on Mathematics |
| | Book on Physics | Book on Physics | Book on Physics |
| | Book on Chemistry | Book on Chemistry | Book on Chemistry |
| | Cure for AIDS | Cure for AIDS | Cure for AIDS |
| | Cure for common flue | Cure for common flue | Cure for common flue |
| | Sky scraper | Sky scraper | Sky scraper |
| | Cottage | Cottage | Cottage |
| | Bridge | Bridge | Bridge |

Showing Columns: 1 - 3 (of 3) < Previous | Next >   View All

Click button to include or exclude selected values from the dependent picklist:
Include Values   Exclude Values

# 2.2.2.16 Picklist (Multi-Select)

## Info

- This chapter shows how to create Picklist (Multi-Select) Field.

## Procedure

- Show Object Fields
- Choose Field Type: Picklist (Multi-Select)
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

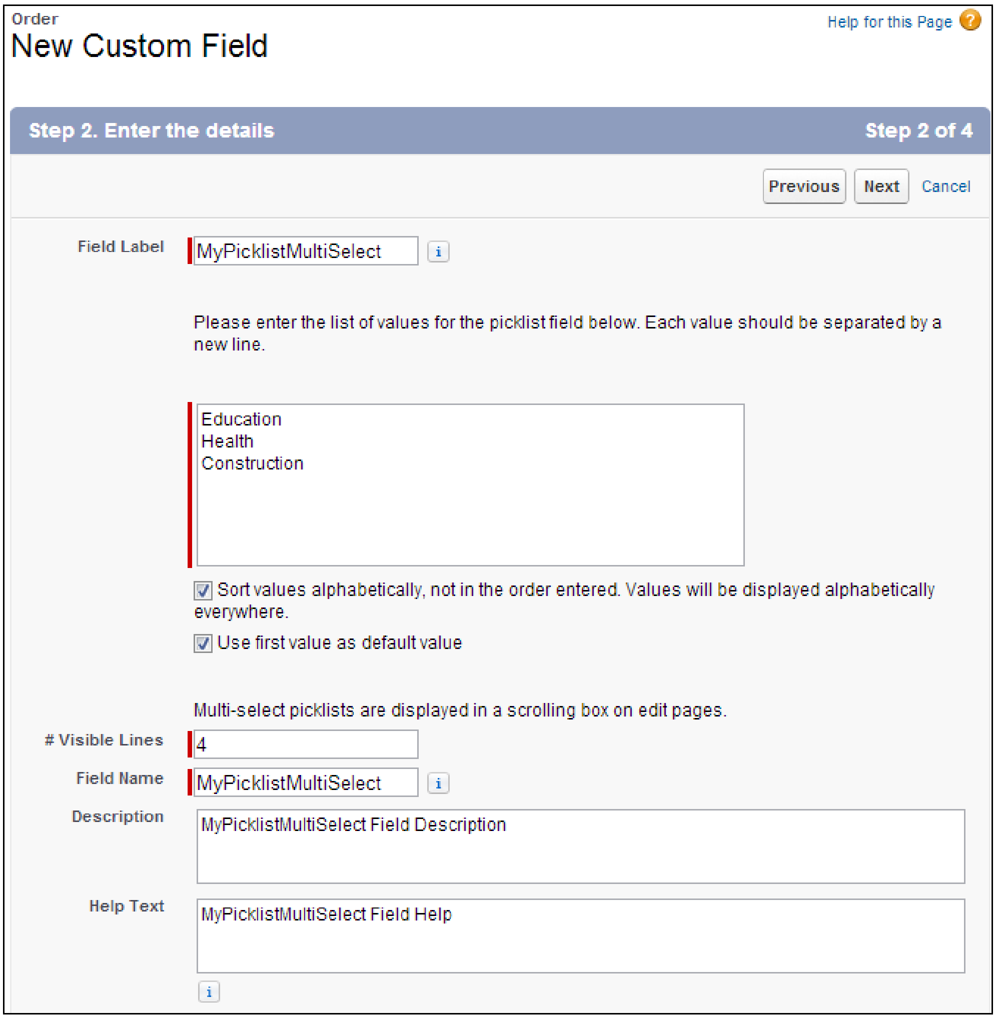
## Enter the details

- Field Label: MyPicklistMultiSelect
- Please enter the list of values for the picklist field below. Each value should be separated by a new line.

  Education

  Health

  Construction
- Sort values alphabetically, not in the order entered: CHECK
- Use first value as default value: CHECK
- *# Visible Lines: 4
- Field Name: MyPicklistMultiSelect
- Description: MyPicklistMultiSelect Field Description
- Help Text: MyPicklistMultiSelect Field Help
- Next



# 2.2.2.17 Text

## Info

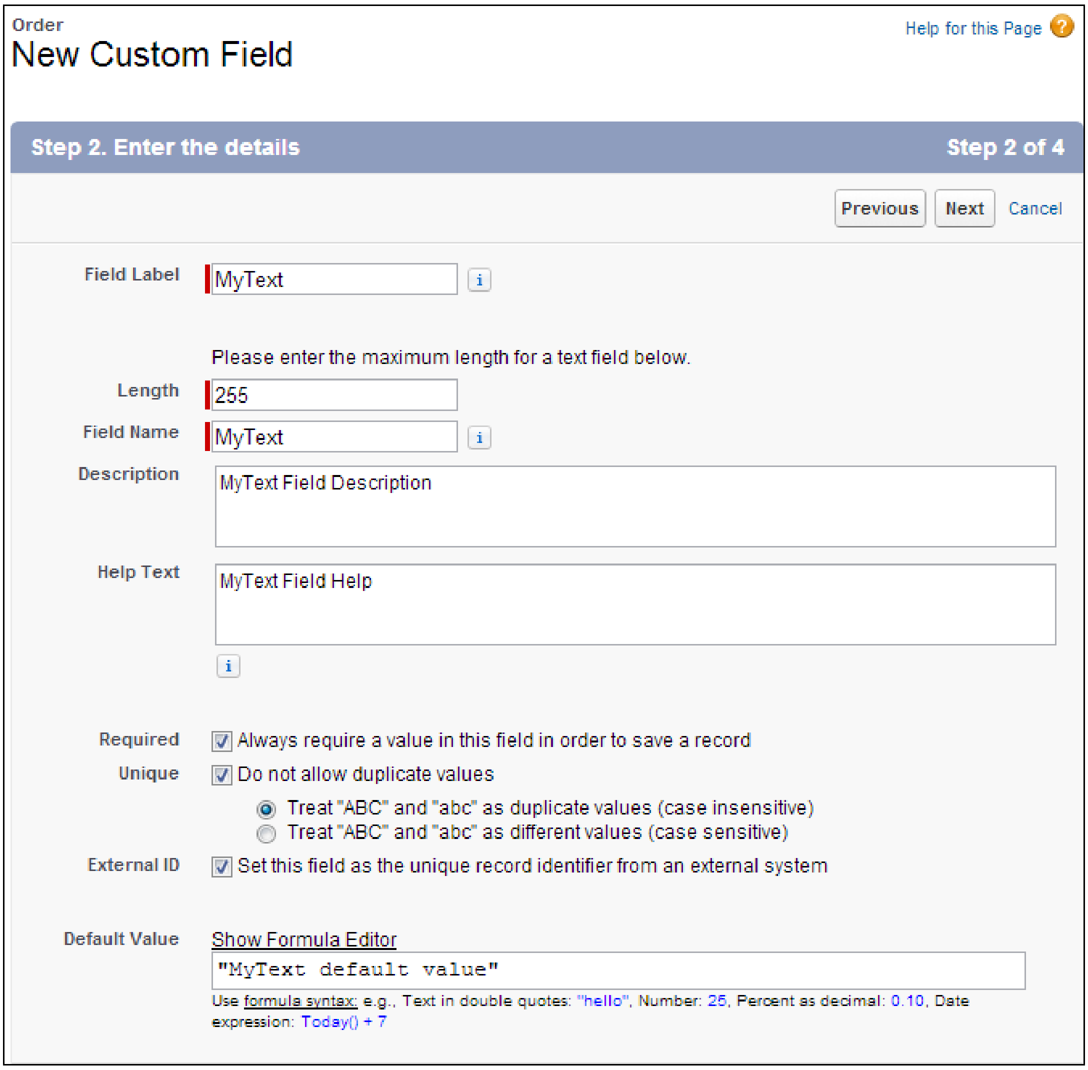
- This chapter shows how to create Text Field.

## Procedure

- Show Object Fields
- Choose Field Type: Text
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyText
- Length: 255 (255 is max number of characters)
- Field Name: MyText
- Description: MyText Field Description
- Help Text: MyText Field Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Unique: CHECK (Do not allow duplicate values)
- External ID: CHECK (Set this field as the unique record identifier from an external system)
- Default Value: "MyText default value" (Supports formula)
- Next



# 2.2.2.18 Text Area

## Info

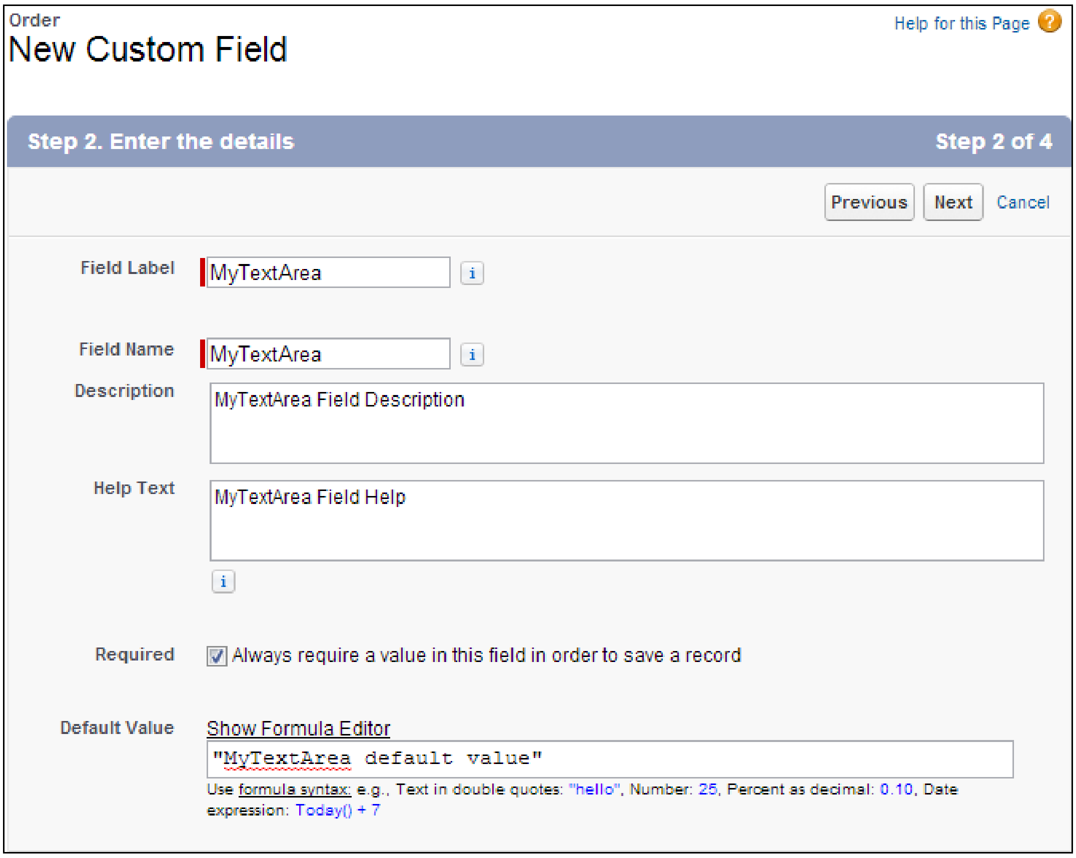
- This chapter shows how to create Text Area Field.

## Procedure

- Show Object Fields
- Choose Field Type: Text Area
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyTextArea
- Field Name: MyTextArea
- Description: MyTextAreaField Description
- Help Text: MyTextAreaField Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: "MyTextArea default value" (Supports formula)
- Next



# 2.2.2.19 Text Area (Long)

## Info

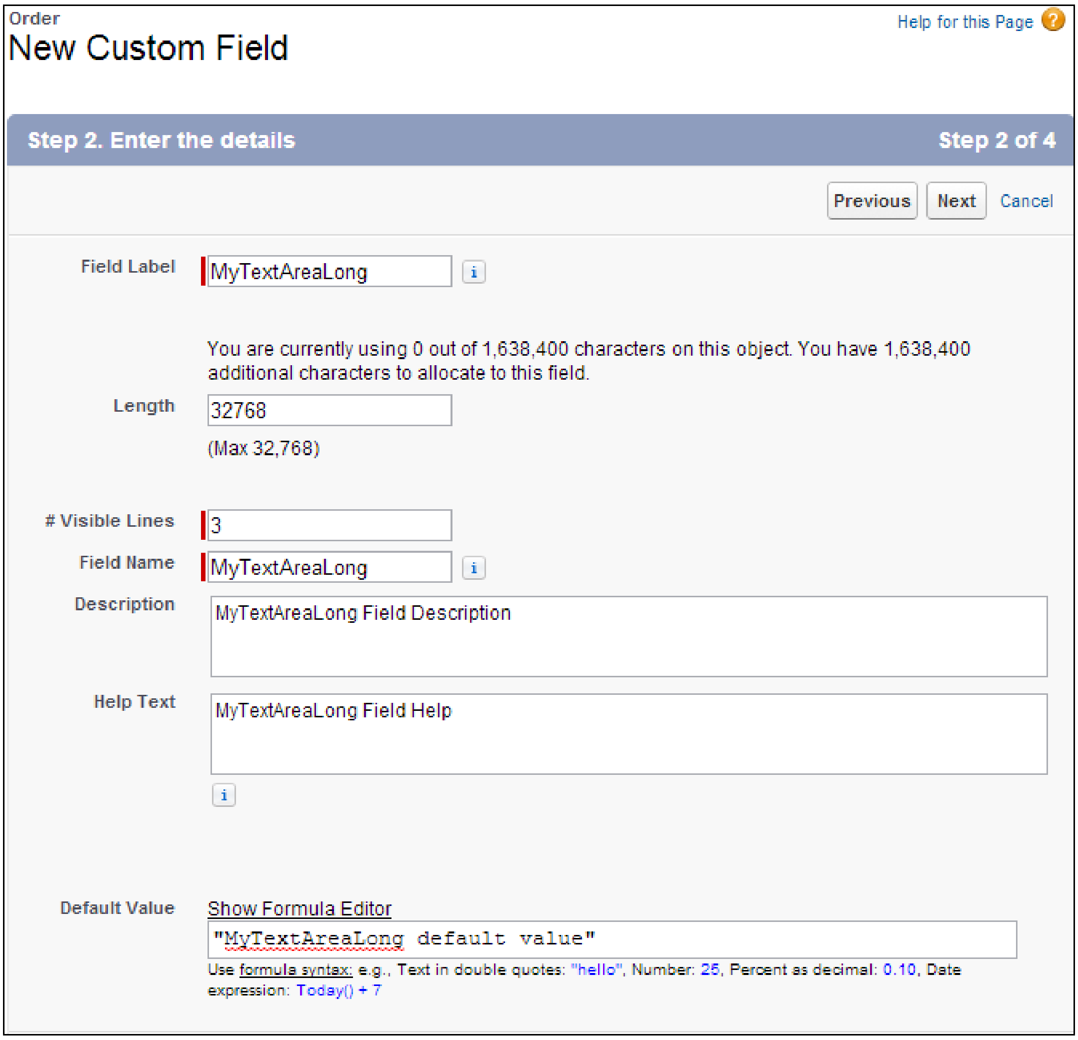
- This chapter shows how to create Text Area (Long) Field.

## Procedure

- Show Object Fields
- Choose Field Type: Text Area
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyTextAreaLong
- Length: 32768
- # Visible Lines: 3
- Field Name: MyTextAreaLong
- Description: MyTextAreaLong Description
- Help Text: MyTextAreaLong Help
- Default Value: "MyTextAreaLong default value" (Supports formula)
- Next



# 2.2.2.20 Text Area (Rich)

## Info

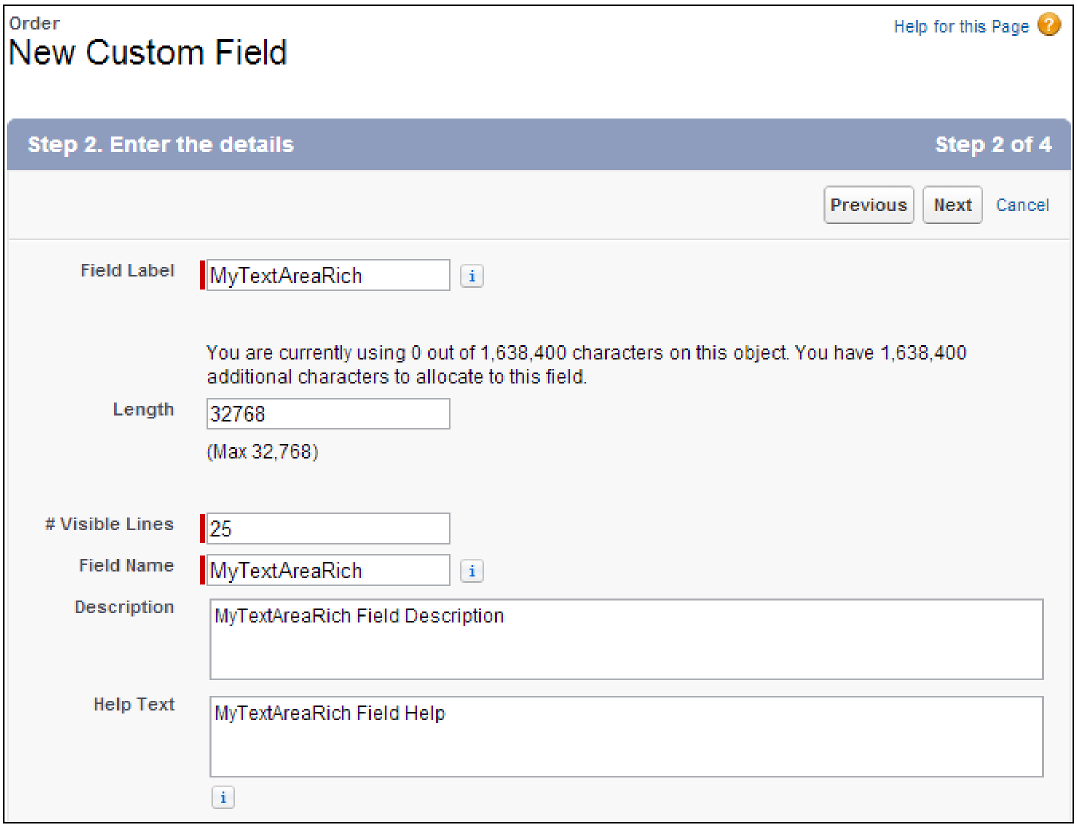
- This chapter shows how to create Text Area (Rich) Field.

## Procedure

- Show Object Fields
- Choose Field Type: Text Area
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyTextAreaRich
- Length: 32768
- # Visible Lines: 25
- Field Name: MyTextAreaRich
- Description: MyTextAreaRich Description
- Help Text: MyTextAreaRich Help
- Next



# 2.2.2.21 Text (Encrypted)

## Info

- Encrypted custom fields are text fields that can contain letters, numbers, or symbols but are encrypted.
- The value of an encrypted field is only visible to users that have the “View Encrypted Data” permission.
- Only the `<apex:outputField>` component supports presenting encrypted fields in Visualforce pages
- Additional info can be found at About Encrypted Custom Fields.

## Restrictions

- Limited to 175 characters
- Are not available for use in filters such as list views, reports, roll-up summary fields, and rule filters
- Cannot be used to define report criteria
- Are not searchable
- Are not available in the following: lead conversion, workflow rule criteria or formulas, formula fields, outbound messages, default values, and Web-to-Lead and Web-to-Case forms
- Encrypted custom fields cannot be unique, an external ID, or have default values.

## Allowed

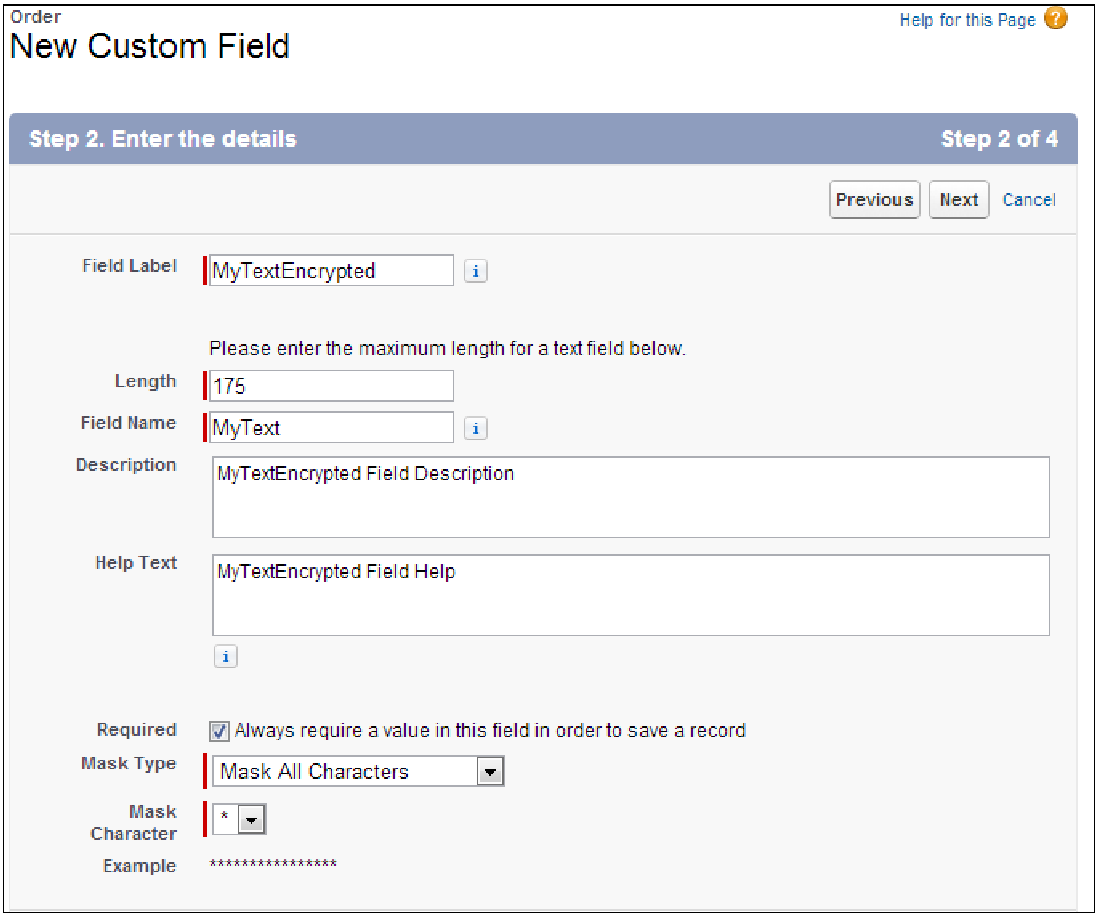
- You can validate the values of encrypted fields using validation rules or Apex.
- Can be included in repo
- Can be included in search results
- Encrypted fields are editable regardless of whether the user has the “View Encrypted Data” permission.
  Use validation rules, field-level security settings, or page layout settings to prevent users from editing encrypted fields.

## Create Encrypted Field

- Show Object Fields
- Choose Field Type: Text (Encrypted)
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyTextEncrypted
- Length: 175 (175 is max value)
- Field Name: MyTextEncrypted
- Description: MyTextEncrypted Description
- Help Text: MyTextEncrypted Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Mask Type: Mask All Characters
- Mask Character: * ('*' or 'X')
- Example: ***************
- Next



# 2.2.2.22 URL

## Info

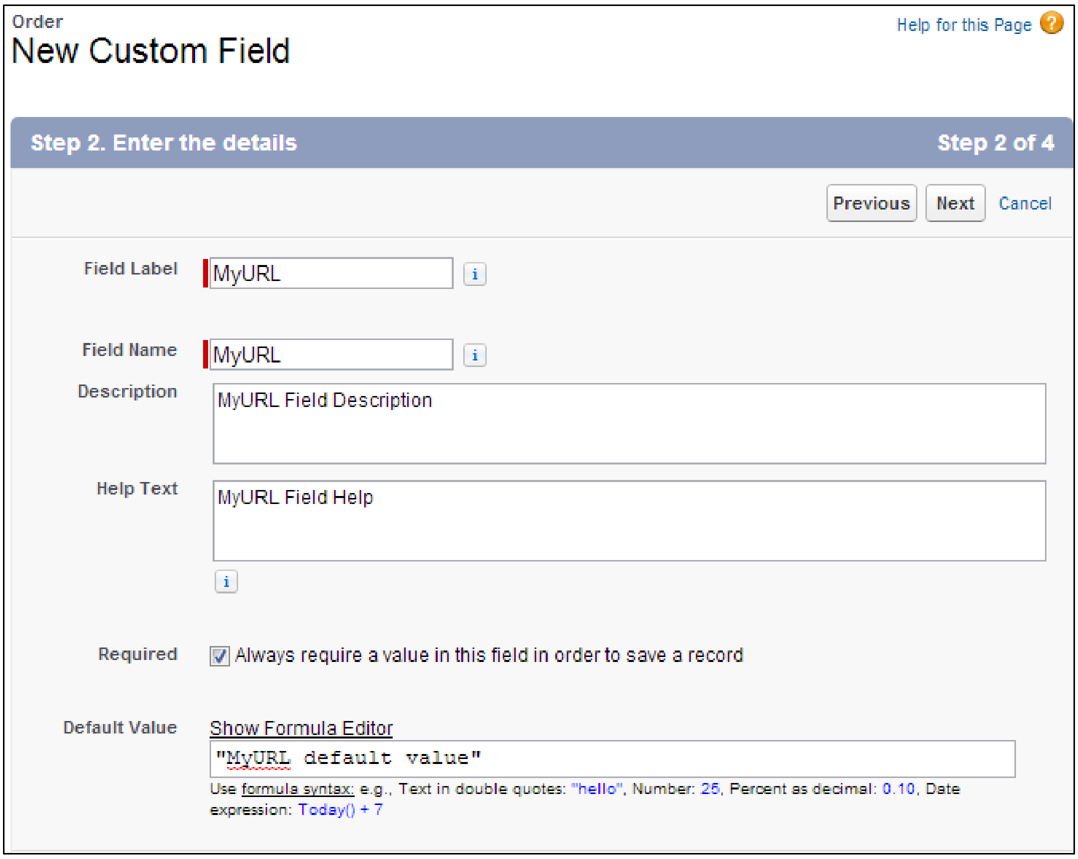
- This chapter shows how to create URL Field.

## Procedure

- Show Object Fields
- Choose Field Type: URL
- Enter the details (As defined below in this chapter)
- Establish field-level security
- Add to Page Layout

## Enter the details

- Field Label: MyURL
- Length: 175 (175 is max value)
- Field Name: MyURL
- Description: MyURL Description
- Help Text: MyURL Help
- Required: CHECK (Always require a value in this field in order to save a record)
- Default Value: "MyURL default value" (Supports formula)
- Next



# 2.2.3 Standard Fields

### Info

- Following chapters describe different standard fields, their function and usage.

# 2.2.3.1 Record Owner

### Info

- Record owner can be
  - User
  - Queue for Leads and Cases
- Record owner can View, Edit, Delete and Transfer ownership unless restricted through
  - Profiles Object Permissions which can remove View, Edit and Delete permissions
  - Profiles Field Level Security which can remove View, Edit and Delete permissions for specific fields
  - Profiles General User Permissions which contains options to activate “Transfer Leads” and “Transfer Cases.”
  - Page Layout which might not display all fields
- Record owner can be changed by
  - record owner
  - user above record owner in role hierarchy
  - user with modify all permission

# 2.3 Record Types

## Info

- Record Type is a special type of picklist field.
- It behaves like a normal picklist field since it allows you from predefined set of values.
- It is special since defining and choosing those values is done in a different way together with other peculiarities.

## Usage

- Combination of Record Type and Profile defines which Page Layout will be used to display Record Fields.
- It behaves as controlling picklist for ALL other picklists defining which values will be available for each of them.

## Record Type vs Picklist Field

### Similarities

- Both allow you to predefine set of values you can later select from.
- Both allow you to select single value from that predefined set of values.
- Both can be controlling picklist where selected value defines what values of other picklist will be available.

### Differences

- Set of values you can later select from are defined in a different way.
- Selecting single value from that predefined set of values is done in a different way.
- Picklist CAN be controlling picklist while Record type is ALWAYS controlling picklist.
- If picklist is controlling picklist it can control only available values of ONE other picklist.
  Record type is ALWAYS controlling picklist of ALL other picklists.
- Combination of Record Type and Profile defines which Page Layout will be used to display Record Fields.

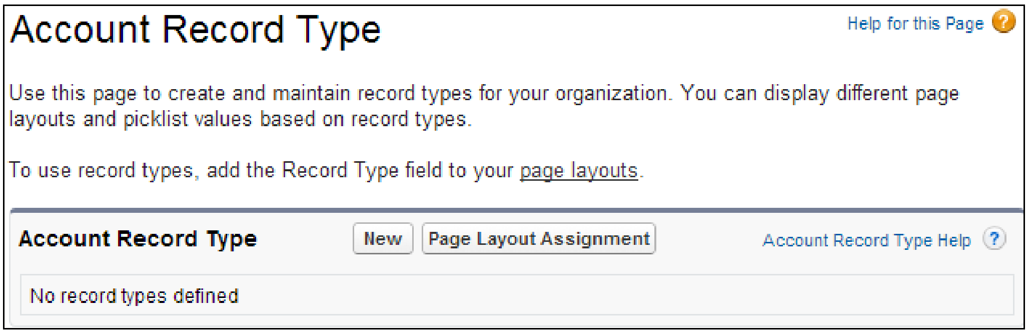
# 2.3.1 View Record Types of specific Object

## Info

- This tutorial shows how to view Record Types of Specific Object.
- Procedure differs between standard and custom Objects as shown below.

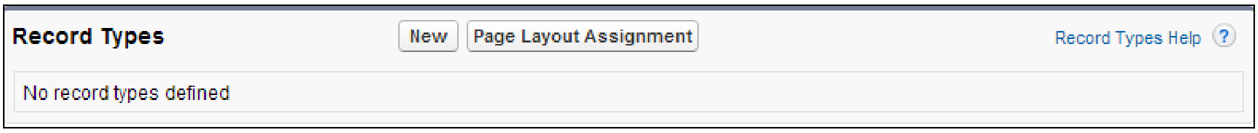
## For Standard Objects

- Setup
- Build
- Customize
- (Select Standard Object) (For example: Account)
- **Record Types** (This is a link)




## For Custom Objects

- Setup
- Build
- Create
- Objects
- (Select Custom Object) (For example: Employee)
- **Section: Record Types**



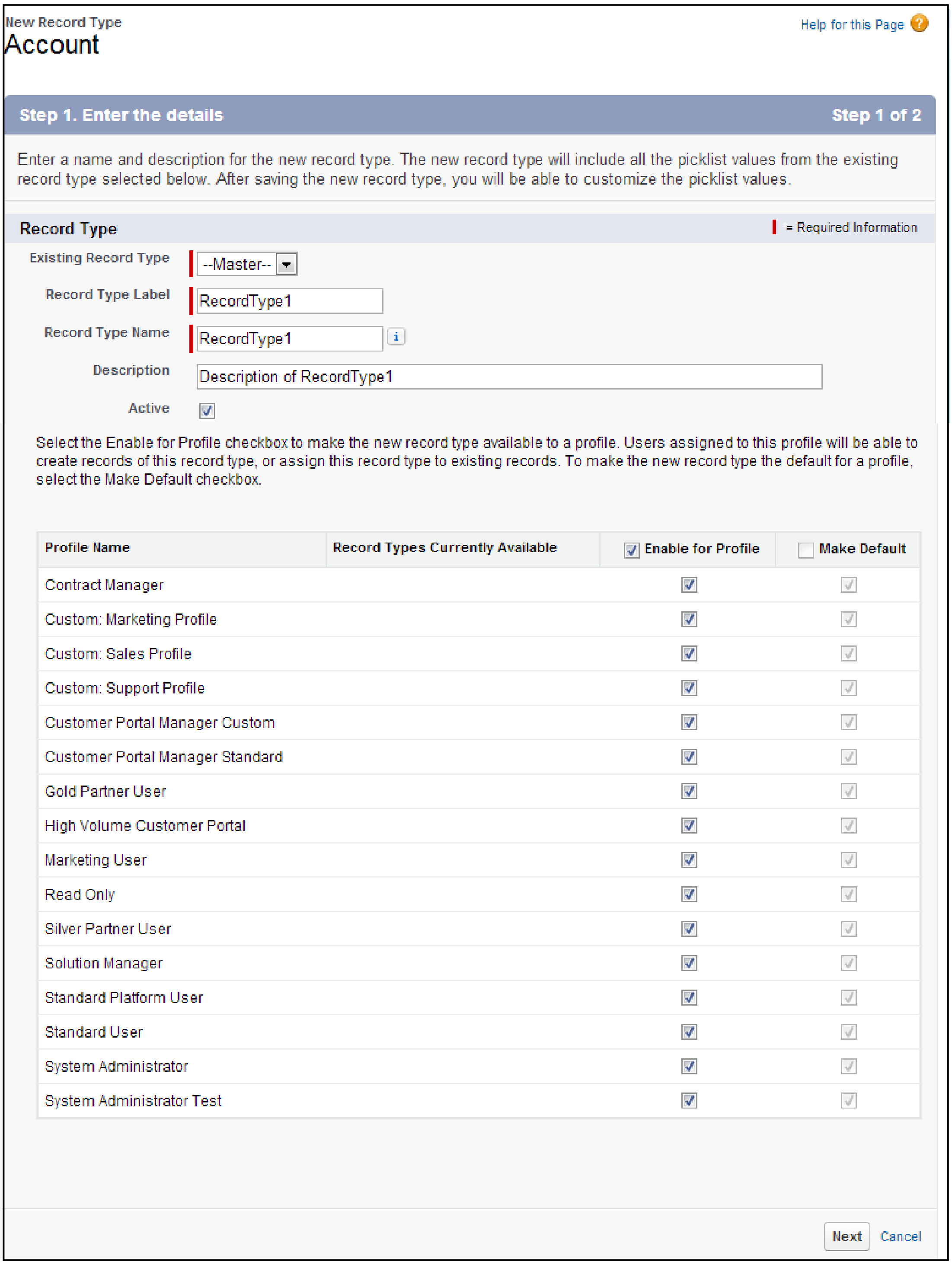
# 2.3.2 Create new Record Type for specific Object

## Info

- This tutorial shows how to create new Record Type for specific Object.

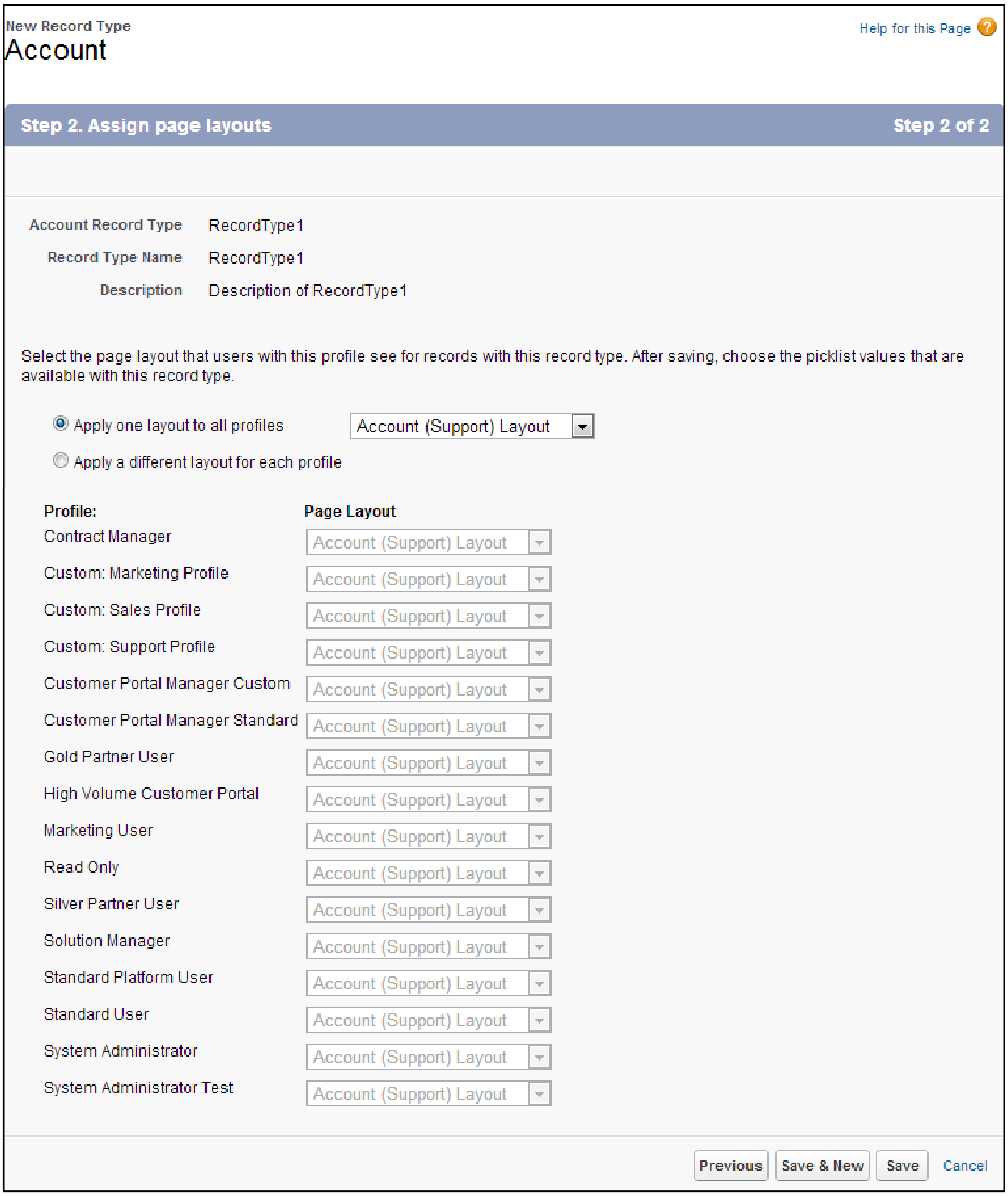
## Create Record Type

- View Record Types of Specific Object
- New
- Existing Record Type: --Master-- (It will include picklist values from selected Record Type)
- Record Type Label: RecordType1 (Defines record Type Name)
- Record Type Name: RecordType1 (Automatically populated by Record Type Label)
- Description: Description of RecordType1
- Active: CHECK
- Next



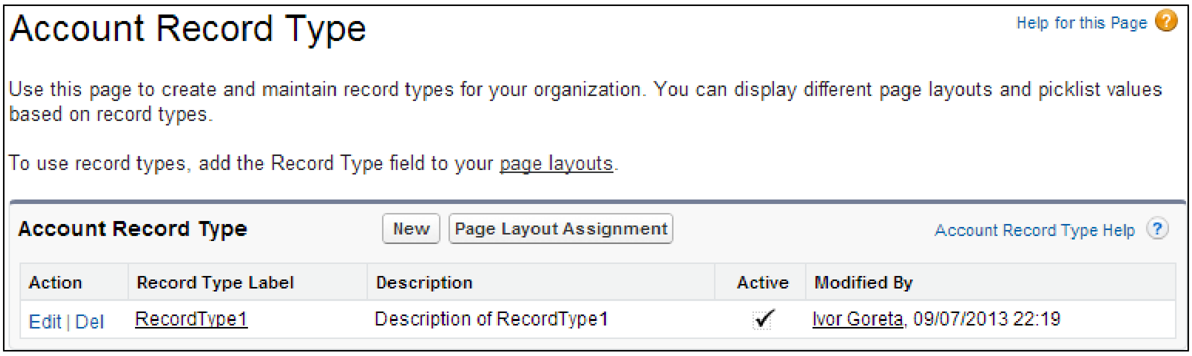
## Assign page layouts

- Apply one layout to all profiles: Account (Support) Layout
- Save




## Test

- View Record Types of Specific Object



# 2.3.3 Edit picklist values available for Record Type

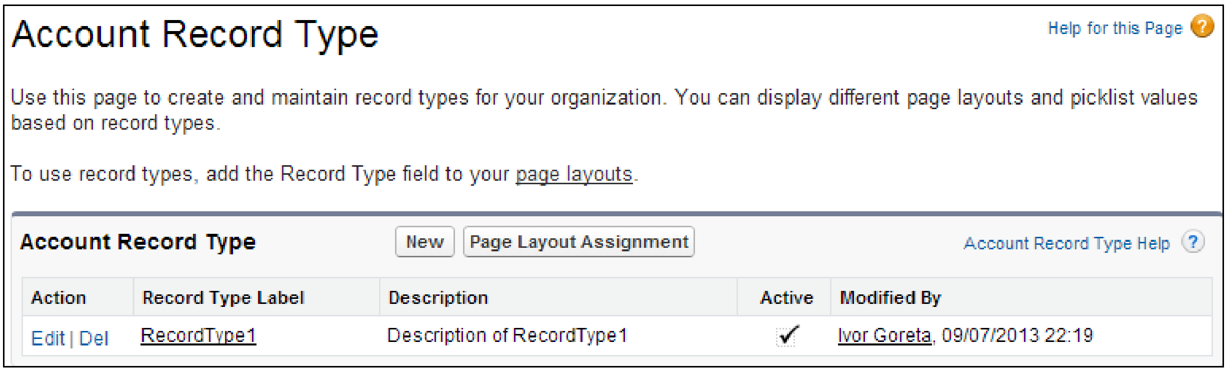
## Info

- This tutorial shows how to define which picklist values will be available for each picklist for specific Record Type.

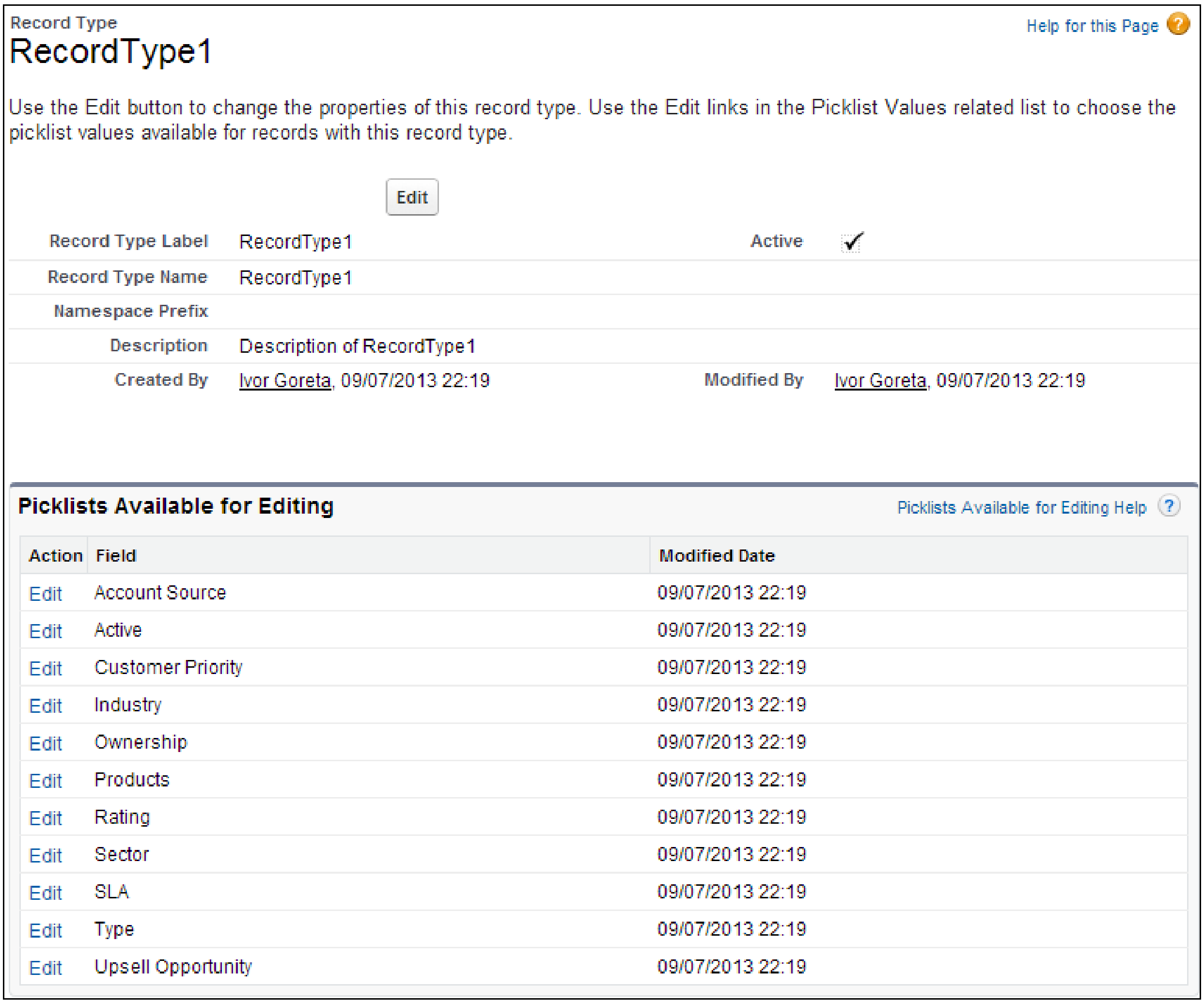
## Open Record Type

- View Record Types of Specific Object (For example: For Account Object)
- (Select Record Type) (For example: RecordType1)

*List of Record Types*



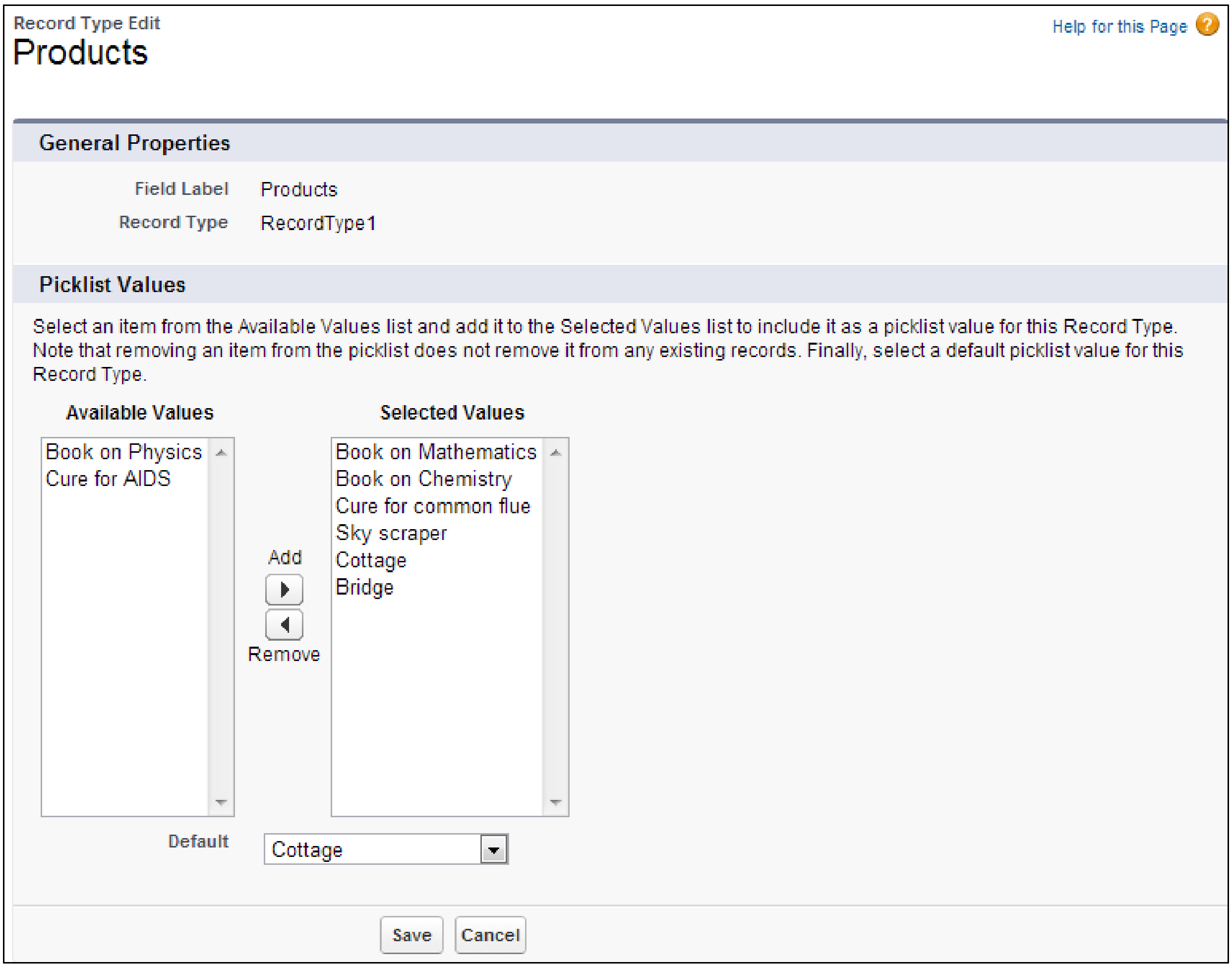

*List of picklist Fields*



## Edit picklist values for specific picklist

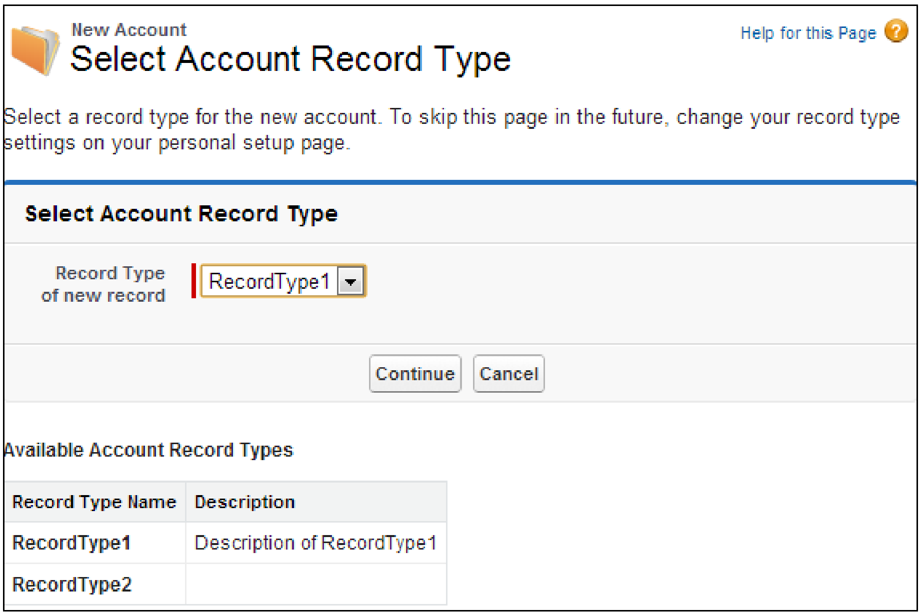
- (Click on Edit beside picklist) (For example: Products picklist)
- (Select values to Add or Remove) (Use Ctrl or Shift to select multiple values)
- (Press Add or Remove buttons)
- Save

*Picklist values of Product picklist allowed for this Record Type*

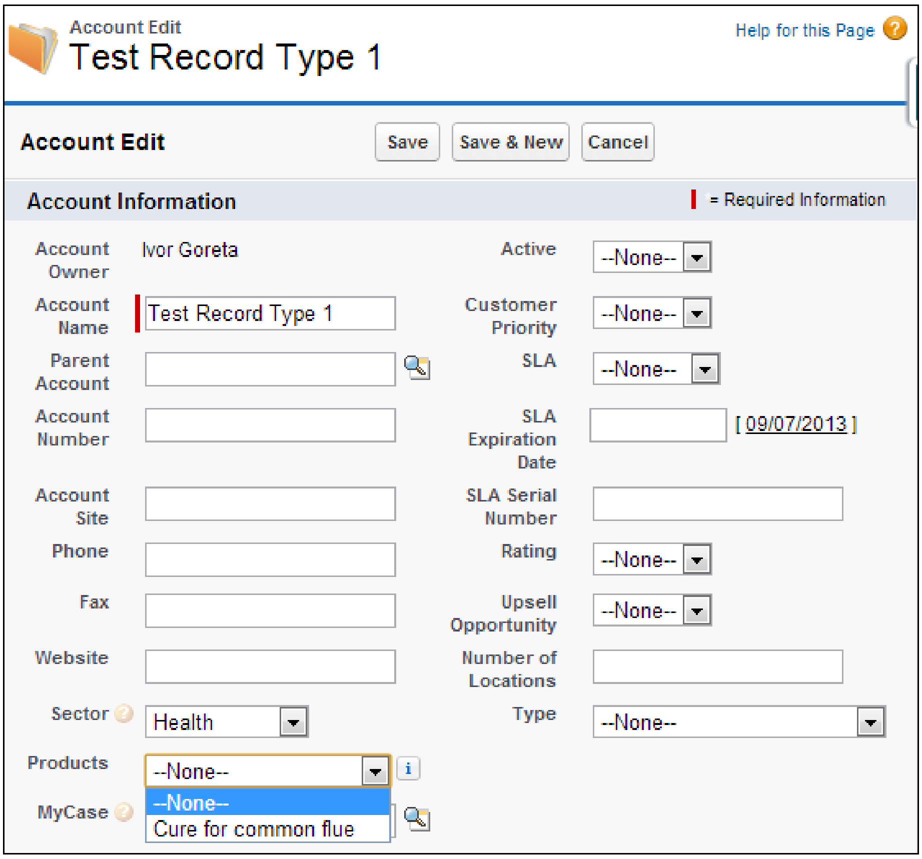


## Test

- (Create another Record Type as shown above) (For example: RecordType2)
- Tab: Accounts
- New
- Record Type of new record: RecordType1 (Picklist is shown only if none or multiple Record Types are defined)
- Continue
- Account Name: Test Record Type 1
- Sector: Health
- Products: Cure for common flue
- Save




*"Cure for AIDS" is not shown since it is not supported by RecordType1*



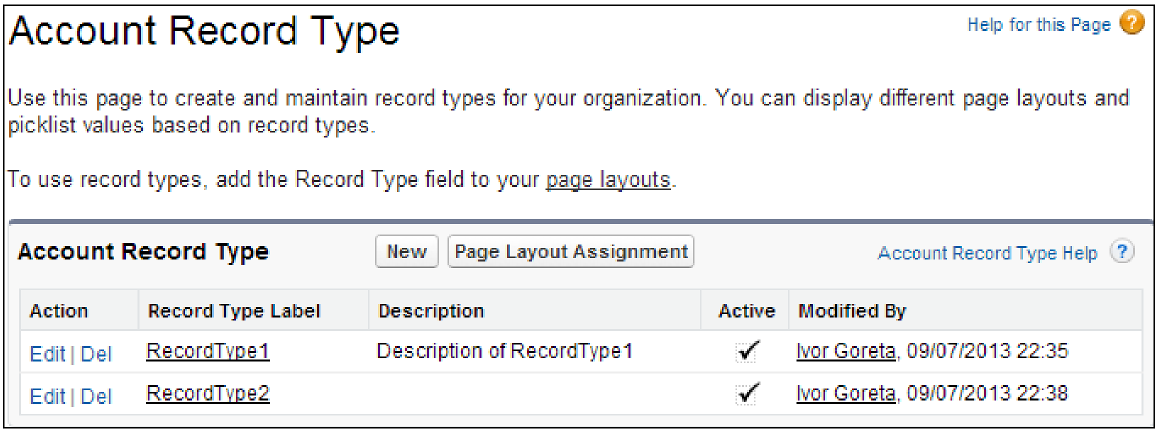
## 2.3.4 Assign Page Layout for each Profile and Record Type combination

### Info

- This tutorial shows how to assign Page Layout for each Profile and Record Type combination.

### Open Assignments

- View Record Types of Specific Object (For example: For Account Object)
- Page Layout Assignment
- Edit Assignment



# Account Record Type

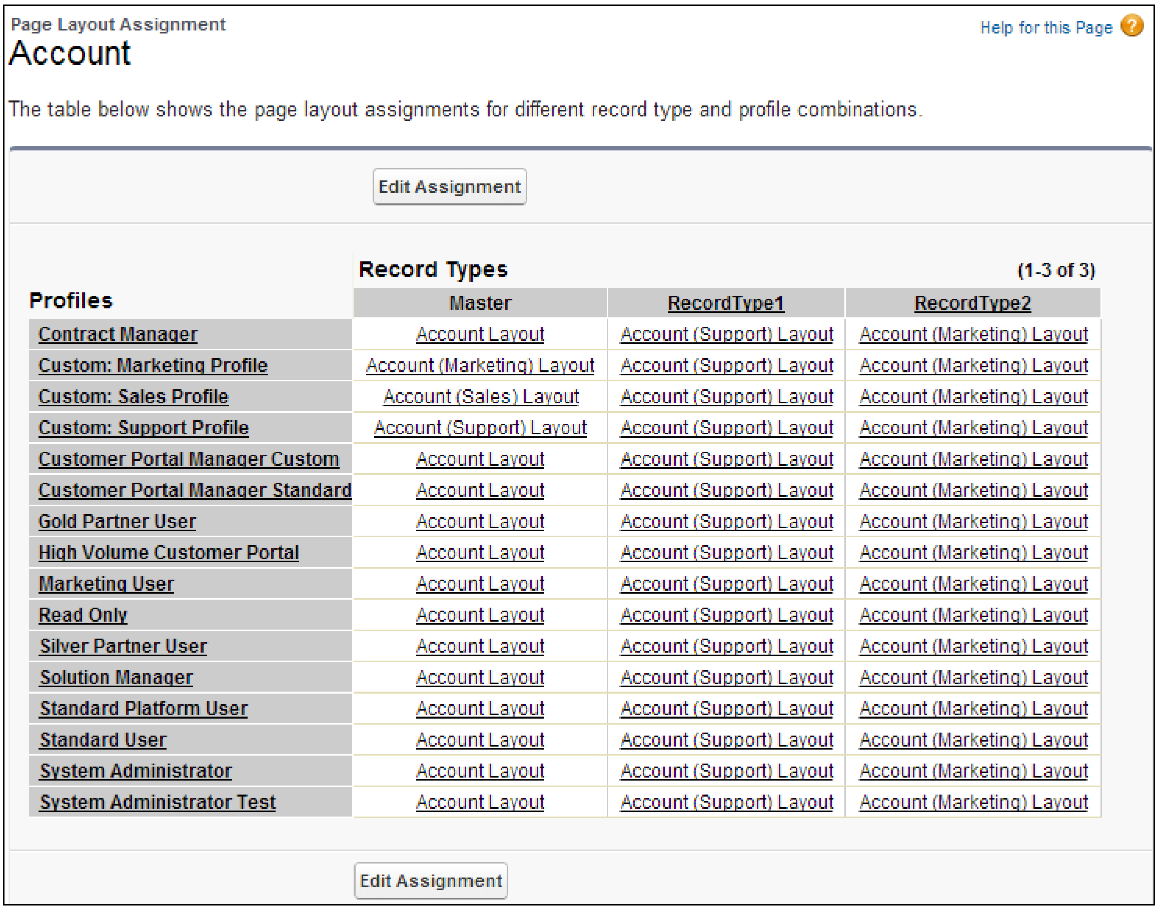
Help for this Page

Use this page to create and maintain record types for your organization. You can display different page layouts and picklist values based on record types.

To use record types, add the Record Type field to your page layouts.

**Account Record Type** New | Page Layout Assignment — Account Record Type Help

| Action | Record Type Label | Description | Active | Modified By |
|---|---|---|---|---|
| Edit \| Del | RecordType1 | Description of RecordType1 | ✓ | Ivor Goreta, 09/07/2013 22:35 |
| Edit \| Del | RecordType2 | | ✓ | Ivor Goreta, 09/07/2013 22:38 |



Page Layout Assignment

# Account

Help for this Page

The table below shows the page layout assignments for different record type and profile combinations.

Edit Assignment

**Record Types** (1-3 of 3)

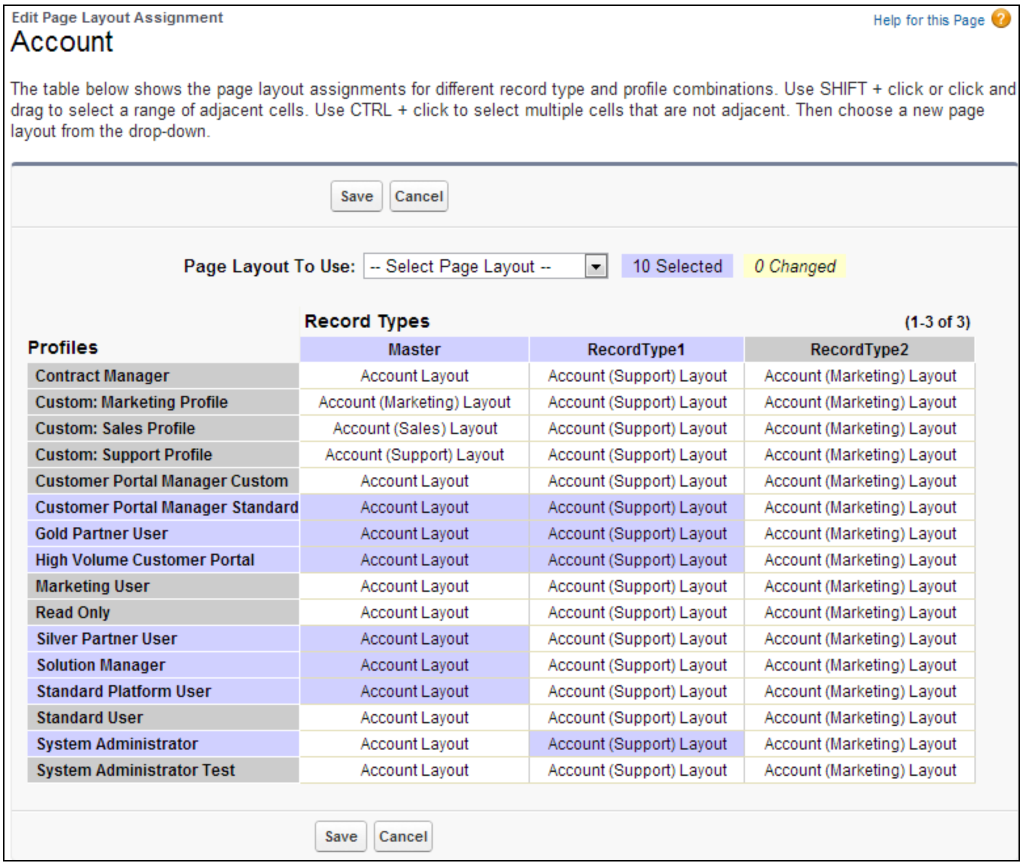
| Profiles | Master | RecordType1 | RecordType2 |
|---|---|---|---|
| Contract Manager | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Custom: Marketing Profile | Account (Marketing) Layout | Account (Support) Layout | Account (Marketing) Layout |
| Custom: Sales Profile | Account (Sales) Layout | Account (Support) Layout | Account (Marketing) Layout |
| Custom: Support Profile | Account (Support) Layout | Account (Support) Layout | Account (Marketing) Layout |
| Customer Portal Manager Custom | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Customer Portal Manager Standard | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Gold Partner User | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| High Volume Customer Portal | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Marketing User | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Read Only | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Silver Partner User | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Solution Manager | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Standard Platform User | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Standard User | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| System Administrator | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| System Administrator Test | Account Layout | Account (Support) Layout | Account (Marketing) Layout |

Edit Assignment

## Edit Assignments

- Edit Assignment
- (Select Page Layouts which should be changed) (Use: drag, Ctrl and Shift)
- Page Layout To Use: (Select replacement Page Layout) (For example Account (Marketing) Layout)
- Save

*Selecting Page Layouts that should be changed*



Edit Page Layout Assignment

Help for this Page

Account

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Save Cancel

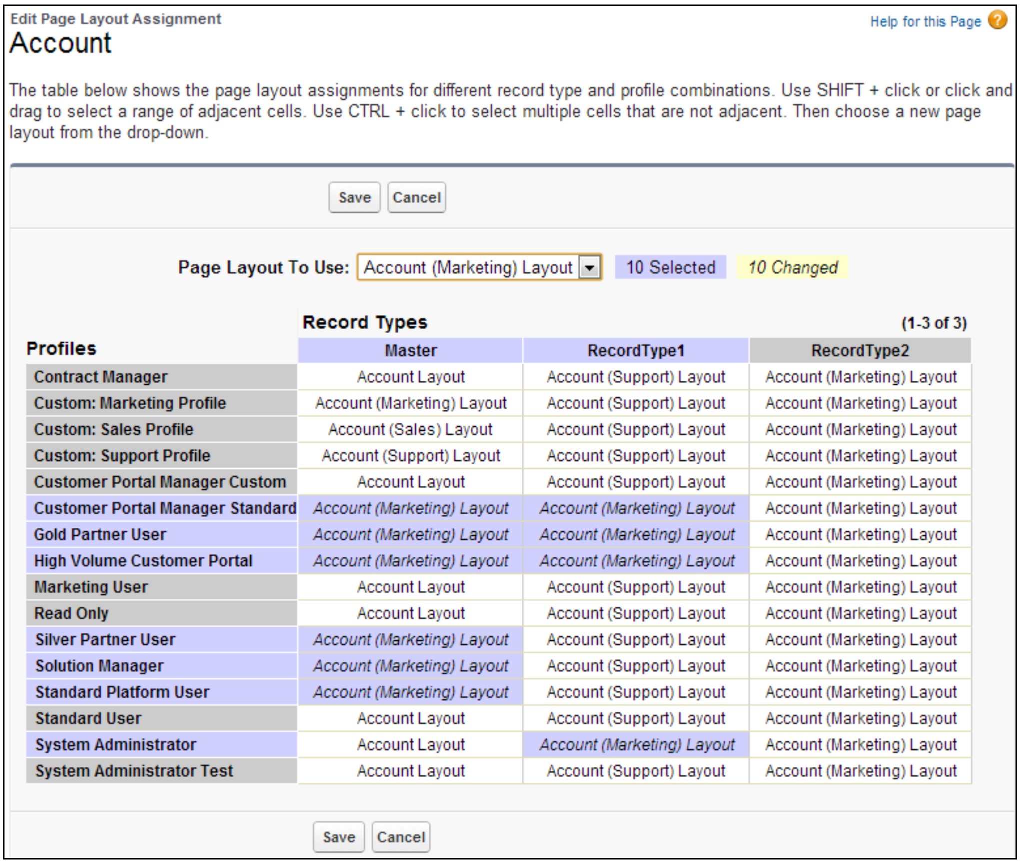
Page Layout To Use: -- Select Page Layout -- 10 Selected *0 Changed*

Record Types (1-3 of 3)

| Profiles | Master | RecordType1 | RecordType2 |
|---|---|---|---|
| Contract Manager | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Custom: Marketing Profile | Account (Marketing) Layout | Account (Support) Layout | Account (Marketing) Layout |
| Custom: Sales Profile | Account (Sales) Layout | Account (Support) Layout | Account (Marketing) Layout |
| Custom: Support Profile | Account (Support) Layout | Account (Support) Layout | Account (Marketing) Layout |
| Customer Portal Manager Custom | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Customer Portal Manager Standard | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Gold Partner User | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| High Volume Customer Portal | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Marketing User | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Read Only | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Silver Partner User | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Solution Manager | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Standard Platform User | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Standard User | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| System Administrator | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| System Administrator Test | Account Layout | Account (Support) Layout | Account (Marketing) Layout |

Save Cancel

*Changed Page Layouts*



Edit Page Layout Assignment

Help for this Page

Account

The table below shows the page layout assignments for different record type and profile combinations. Use SHIFT + click or click and drag to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent. Then choose a new page layout from the drop-down.

Save Cancel

Page Layout To Use: Account (Marketing) Layout 10 Selected *10 Changed*

Record Types (1-3 of 3)

| Profiles | Master | RecordType1 | RecordType2 |
|---|---|---|---|
| Contract Manager | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Custom: Marketing Profile | Account (Marketing) Layout | Account (Support) Layout | Account (Marketing) Layout |
| Custom: Sales Profile | Account (Sales) Layout | Account (Support) Layout | Account (Marketing) Layout |
| Custom: Support Profile | Account (Support) Layout | Account (Support) Layout | Account (Marketing) Layout |
| Customer Portal Manager Custom | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Customer Portal Manager Standard | *Account (Marketing) Layout* | *Account (Marketing) Layout* | Account (Marketing) Layout |
| Gold Partner User | *Account (Marketing) Layout* | *Account (Marketing) Layout* | Account (Marketing) Layout |
| High Volume Customer Portal | *Account (Marketing) Layout* | *Account (Marketing) Layout* | Account (Marketing) Layout |
| Marketing User | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Read Only | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| Silver Partner User | *Account (Marketing) Layout* | Account (Support) Layout | Account (Marketing) Layout |
| Solution Manager | *Account (Marketing) Layout* | Account (Support) Layout | Account (Marketing) Layout |
| Standard Platform User | *Account (Marketing) Layout* | Account (Support) Layout | Account (Marketing) Layout |
| Standard User | Account Layout | Account (Support) Layout | Account (Marketing) Layout |
| System Administrator | Account Layout | *Account (Marketing) Layout* | Account (Marketing) Layout |
| System Administrator Test | Account Layout | Account (Support) Layout | Account (Marketing) Layout |

Save Cancel