



# USING THE CONSOLE TAB

## Summary

The console is a tab that combines related records into one screen with different frames so that users have all the information they need when interacting with Salesforce. Common tasks are accomplished with fewer clicks and without much navigation. Administrators choose the information displayed in the console to accommodate varied and evolving business processes.

## Service Cloud Console

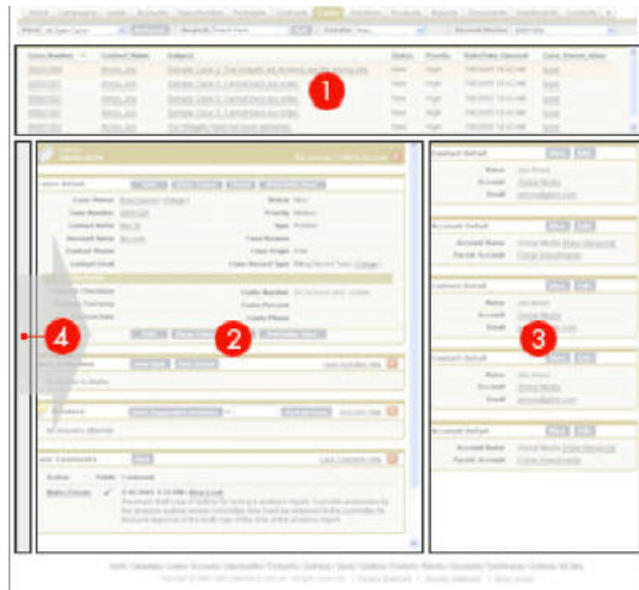
The Salesforce console is different from the Console tab. It improves on the Console tab by displaying records and related items as tabs on one screen. For more information, see “Salesforce Console” in the Salesforce Help.


## Resizing Frames

To resize a frame in the console, point to a frame. When the pointer changes to a double-headed arrow, drag the frame until it is the size you want. You cannot resize the sidebar.

## Console Concepts

Before setting up and using the Console tab, review the following terminology used to describe its components:



- 1. List View**—A list display of records based on specific criteria. The list views you can select to display in the console are the same list views defined on the selected object’s tab. You cannot create a list view from the console.  
 **Note:** When a user selects the Console tab, it displays the last list view he or she viewed from the console.
- 2. Detail View**—The detail page view of any record selected from any of the console’s frames. The detail view displays the same page layouts defined on the object’s detail pages. When a record is displayed in the detail view, it is highlighted in the list view.
- 3. Mini View**—Records associated with the record displayed in the detail view. The fields displayed in the mini view are defined in the mini page layouts by an administrator. If a record displayed in the detail view does not have any records associated with it, then the mini view does not display.
- 4. Sidebar**—A column that, when moused over, displays a calendar shortcut, recent items, and the Recycle Bin, just like the sidebar displayed on every Salesforce page. To display the sidebar in the console, click the arrow icon on the left frame.

## Starting the Console

After an administrator sets up the console, users can start using it by clicking the Console tab.


## Calendar Shortcut

Administrators can display a shortcut to the calendar in the sidebar for all users from Setup by entering *Calendar Shortcut* in the **Quick Find** box, then selecting **Calendar Shortcut**, selecting **Show Calendar Shortcut**, and clicking **Save**.

## Setting Up the Console Tab

Administrators set up the console in five steps: create console layouts, choose the related objects to show in the mini view, define mini page layouts, assign user profiles to console layouts, and add the Console tab to custom apps.

1. Create console layouts to define which objects users can see from the console's list view. For example, if you add cases to a console layout, then users whose profiles are assigned to that console layout can see list views of cases in the console's list view.
  - a. From Setup, enter *Console Layouts* in the **Quick Find** box, then select **Console Layouts**.
  - b. Click **New**.
  - c. Enter a name for the new layout.
  - d. Click **Save**.
  - e. Click **Edit** in the Selected List Views section.
    - To add or remove objects to the layout, select an object, and click the **Add** or **Remove** arrow.
    - To change the order of the objects as they will appear in the console's list view frame, select an object in the Selected List box, and click the **Up** or **Down** arrow.
  - f. To add or remove objects to the layout, select an object, and click the **Add** or **Remove** arrow.
  - g. To change the order of the objects as they will appear in the console's list view frame, select an object in the Selected List box, and click the **Up** or **Down** arrow.
  - h. Click **Save**.
2. Define which related records display in the mini view when a record of a particular type is shown in the detail view. For example, when a case is in the detail view, you can display an account, contact, or asset in the mini view. To choose related objects:
  - a. From Setup, enter a related object's name in the **Quick Find** box, then select **Page Layouts**.
  - b. Choose a page layout name.
  - c. Click **Mini Console View**.
  - d. Select which records associated with the record in the detail view will be displayed in the mini view. You can only select objects that are defined as lookup relationships and are included on the page layout.
 

 **Note:** You can change the order of how related objects display in the mini view by clicking the **Up** and **Down** arrows.
  - e. Click **Save**.
3. Define mini page layouts for the records that appear in the mini view of the console. A mini page layout contains a subset of the items in an existing page layout. Mini page layouts inherit record types, profile associations, related lists, fields, and field-level security from the page layout. To define a mini page layout:
  - a. Choose the page layout for the related object you want to customize.
  - b. Click **Mini Page Layout**.

- c. Select which fields and related lists will be displayed for this type of record in the mini view. For each related list you select, choose which fields to display in that related list.
        - The more related lists you add to mini page layouts, the longer it may take the console to process data.
        - You can select all of the available fields and related lists to display in the console; however, it is recommended that you only select a few so that users do not have to scroll to find information.
        - Selected fields and related lists display in the console even when they do not contain content.
      - d. Click **Save**.
    4. Assign profiles to console layouts to determine which console layouts users see:
      - a. From Setup, enter *Console Layout* in the **Quick Find** box, then select **Console Layout**.
      - b. Click **Console Layout Assignment**.
      - c. Select a console layout to assign to a profile via the drop-down list.
      - d. Select the Console tab visibility settings for a profile via the drop-down list.
      - e. Click **Save**.
    5. Add the Console tab to custom apps so that users can access the console from specific apps:
      - a. From Setup, enter *Apps* in the **Quick Find** box, then select **Apps**.
      - b. Click **Edit** next to the app where you want to include the Console tab.
        - To add or remove the Console tab to the app, select the Console tab, and click the **Add** or **Remove** arrow.
        - To change the order of the Console tab as it will appear in the app, select the Console tab in the Selected List box, and click the **Up** or **Down** arrow.
      - c. Click **Save**.

## Home Page Layouts and Mini Page Layouts

Home page layouts affect mini page layouts in the following ways:

- Fields marked **Required** and **Always on Layout** on page layouts are automatically included on the mini page layout and cannot be removed unless they are removed from the page layout.
- Field properties on the page layout determine field properties on the mini page layout. For example, if a field is read-only on the page layout, that same field will be read-only on the mini page layout. To change the field properties of fields on the mini page layout, you must change the field properties of fields on the page layout. Note that the console respects field-level security in organizations where it is available.
- The order of related lists on the page layout determines the order of related lists on the mini page layout. To change the order of related lists on the mini page layout, you must change the order of related lists on the page layout.

## Back and Forward Buttons

Clicking the back or forward buttons on your Web browser cycles you through pages in the console. You will not immediately exit the console by clicking them.

## Using Online Help

Context-sensitive help is only available on pages displayed in the console's detail view. Just like other pages in Salesforce, you can access the help at any time by clicking **Help & Training** above the tabs.

## Pages Display Outside of the Console

Not all pages open within the console. For example, clicking **Printable View** > **Check Spelling**, lookup icons, email addresses, and custom links set to open in a new browser window all open outside of the console in a new browser window or popup.

# Navigating within the Console Tab

What you click in the console determines the frame a record displays in.

### In the mini view, clicking:

- **Links** displays the record in the detail view. Associated records display in the mini view.
- **View** displays the entire record in the detail view.
- **Edit** displays a mini edit page in the mini view. To edit a field not displayed on the mini edit page, click **View** to display the entire record in the detail view, and then click **Edit** from the detail view.
- **Show more** on a related list displays the related list in the detail view.

### In the list view, clicking:

- A link displays the record in the detail view.
- A column heading sorts that column in ascending order. Click the heading a second time to sort in descending order.
- A letter at the bottom of the list view filters your list view records by the letter.
- **fewer** or **more** at the bottom of the list view displays a shorter or longer list.

### In the sidebar, clicking:

- The arrow icon on the left frame keeps the sidebar visible in the console. Click the arrow icon a second time to hide the sidebar.
- A record under **Recent Items** displays the record in the detail view.
- **Calendar** displays the calendar in a new page outside of the console.
- **Recycle Bin** displays the Recycle Bin in a new page outside of the console.

# Using the Console List View

The console's list view allows you to quickly perform actions within Salesforce without leaving the console.

### Display list views

From the drop-down list in the top left of the list view frame, select an object, and then select a list view of the object to display in the console's list view frame. No data displays in the console if the selected list view does not contain any records.

### Search

Enter keywords in **Search** and click **Go!** to perform an advanced search across all searchable objects you have access to in your organization. Search results display in the detail view. Terms in an advanced search are treated as separate words rather than a phrase. So, searching for "Pat Powers" in advanced search will find a contact named "Pat P Powers" as well as a contact named "Pat Smith" with an email address of "smith@powers.com."

### Create records

From the **New** drop-down list, select any object to create a new record. New record pages display in the detail view.

### View recent items

From the **Recent Items** drop-down list, you can choose to display any item you most recently viewed. Recent items display in the detail view.

**Perform mass actions**

Select the checkbox next to items in the list view, and from the **Mass Action** drop-down list, choose the action you want to perform on all the selected records.