



TIPS AND HINTS FOR PAGE LAYOUTS AND FIELD-LEVEL SECURITY

Summary

Learn how to use page layouts and field-level security to control the organization of detail and edit pages for your users. You can add or remove buttons from detail pages, establish unique page layouts for different business situations, and restrict users' access to specific fields.

Page Layout Editors

Salesforce has two WYSIWYG tools for editing page layouts: the original page layout editor and a new enhanced page layout editor. The enhanced page layout editor is enabled by default and provides all of the functionality of the original editor, as well as additional functionality and an easier-to-use interface.

Tips & Hints for Page Layouts and Field-Level Security

What Are Page Layouts and Field-Level Security?

The following sections describe the characteristics and behaviors of page layouts, mini page layouts, and field-level security.

Page layouts

- Control the layout and organization of fields, Visualforce related lists, and custom links on detail and edit pages
- Show or hide standard and custom buttons on detail pages.
- Set which fields are visible, read only, or required on detail and edit pages.
- In Personal, Contact Manager, Group, and Professional Editions, control which fields users can access in list views, reports, Force.com Connect Offline, and when synchronizing data.
- Control the fields displayed on portal objects in the Customer Portal.

Mini page layouts

- Control the layout and organization of fields, related lists, and custom links on records in the mini view of the Console tab.
- Inherit record type and profile associations, related lists, fields, and field access settings from their associated page layout.
- The visible fields and related lists of the mini page layout can be further customized, but the other items inherited from the associated page layout cannot be changed on the mini page layout itself.
- The order of related lists on a page layout determines the order of related lists on its mini page layout.
- Field properties on a page layout determine field properties on its 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.

- Pages that display due to standard button overrides or custom buttons display in the console without the header or sidebar.
- Overrides for the **Edit** and **View** buttons for an object do not affect the **Edit** and **View** buttons in the mini page layouts.

Field-level security

- Available in Enterprise, Unlimited, Performance, and Developer Editions only.
- Restrict users' access to view and edit fields on detail and edit pages.
- Override any less-restrictive field access settings in page layouts.

For example, if a field is required in the page layout and read only in the field-level security settings, the field-level security overrides the page layout and the field will be read only for the user.

- Control which fields users can access in list views, reports, Force.com Connect Offline, Customer Portal pages, and when synchronizing data.

Getting Started with Page Layouts and Field-Level Security

Plan which fields you want users to be able to view or edit, which fields you want required for each tab, and how you want the pages to display for users.

For Personal, Contact Manager, Group, and Professional Edition organizations, from the object management settings for the appropriate object:

1. Go to the fields area to create any custom fields, custom buttons, or custom links for each tab.
2. Go to Page Layouts to define page layouts and related lists for each tab.
All users automatically use the same page layout for each tab.
3. If you have a Professional Edition organization and you plan to use the Console tab, define mini page layouts to organize how fields and related lists will appear in the console's mini view. From a page layout, click **Mini Page Layout**.

For Enterprise, Unlimited, Performance, and Developer Edition organizations:

1. From the management settings for the appropriate object:
 - Go to Buttons, Links, and Actions or to Buttons and Links to create any custom fields, custom buttons, or custom links.
 - Go to Record Types to create record types for different business scenarios. You can show different page layouts to different users based on record types. For example, you can have different layouts for "Partner" accounts and "Customer" accounts. Record types are available in Professional, Enterprise, Performance, Unlimited, and Developer Editions.
 - Go to Page Layouts to:
 - a. Customize your pages, related lists, and Customer Portal pages.
 - b. If your organization plans to use the Console tab, define mini page layouts to organize how fields and related lists will appear in the console's mini view. From a page layout, click **Mini Page Layout**.
 - c. Assign page layouts to users based on profiles and record types. This determines which layouts users will see when viewing different record types. From a page layout, click **Page Layout Assignment**.
 - Go to the fields area to verify that all field access settings are correct. Click a field, then click **View Field Accessibility**.
2. From the profile or permission sets page:
 - Apply field-level security if different users need different field access.

Best Practices

- In Enterprise, Unlimited Performance, and Developer Editions, use field-level security to restrict users' field access; use page layouts primarily to organize pages. In Personal, Contact Manager, Group, and Professional Editions, field-level security is not available. Use page layouts to restrict access to fields and to organize pages.
- To reduce the number of page layouts to maintain, use the same page layout for all profiles for a specific record type.

Troubleshooting

- Click **Preview** while editing a page layout to see how the page will look for users with different profiles. This preview includes any extra security that is set in field-level security.
- Click **Quick Save** to save and continue editing the page layout.
- To see why users can or cannot access a field, view the field accessibility. From Setup, enter *Field Accessibility* in the Quick Find box, then select **Field Accessibility**, and then select an object.

- Assign which record types are available to users with different profiles.
- Manage access to specific fields with profiles or permission sets.