



TIPS AND HINTS FOR RECORD TYPES

Summary

Record types enable you to customize your users' experiences, depending on their needs. You can use record types to offer different business processes, picklist values, and page layouts to different users based on their profiles.

Tips & Hints for Record Types

Here's an example of how record types can work in your org. Let's say you have two sales divisions, hardware and consulting, and only your consulting division receives leads through seminars. You can choose to display the Seminar contact lead source for the consulting division only.

Step 1: Manage master picklists

Define a list of contact `Lead Source` picklist values that contains all of the values used by both the Hardware and Consulting divisions, including Seminar.

Step 2: Create record types

Create two contact record types: one called Hardware and another called Consulting. This step includes adding master picklist values to the record types.

Step 3: Add record types to profiles

Add the Hardware record type to the profiles for all users in the hardware sales division. Add the Consulting record type to the profiles of all users in the consulting sales division.

Step 4: Set personal options for record types


Allow users of both the hardware and consulting sales divisions to bypass the prompt that asks them to select a record type when creating a new contact. If you have users that create contact records for both sales divisions, they can customize their personal settings to always prompt them to select a record type.

 **Tip:** Renaming a record type doesn't change the list of values included in it.

Managing Master Picklists




Before creating record types, include all of the possible record type values in your master list of picklists. The master picklist is a complete list of picklist values that can be used in any record type.

1. From the management settings for the appropriate object, go to the fields area.
2. Click **Edit** next to the appropriate picklist. Alternatively, click **New** to create a custom picklist.
3. Add any new picklist values to be included in any record type.
4. Click **Save**.

 **Note:** The master picklist is independent of all record types and business processes. If you add a picklist value to the master picklist, you must manually include the new value in the appropriate record types. If you remove a picklist value from the master, it is no longer available when creating new records, but records assigned to that value are unchanged.


Creating Record Types

Users with the "Customize Application" permission can create record types. Before you begin, decide how you would like to categorize the picklist values within each tab.

1. From the management settings for the appropriate object, go to Record Types.
2. Click **New**.
3. Choose **Master** from the **Existing Record Type** drop-down list to copy all available picklist values, or choose an existing record type to clone its picklist values.
 -  **Note:** When you create a new record type without cloning an existing one, the new record type automatically includes the master picklist values for both standard and custom picklists. You can then customize the picklist values for the record type.
4. Enter a **Record Type Label** that's unique within the object.
5. Enter a **Record Type Name**. The Record Type Name refers to the component when using the Web services API and prevents naming conflicts on package installation in managed packages.
6. For opportunity, case, lead, and solution record types, select a business process to associate with the record type.
7. Enter a description.
8. Select **Active** to activate the record type.
9. Select **Enable for Profile** next to a profile to make the record type available to users with that profile. Select the checkbox in the header row to enable it for all profiles.
 -  **Tip:** If each profile is associated with a single record type, users will never be prompted to select a record type when creating new records.
10. For enabled profiles, select **Make Default** to make it the default record type for users of that profile. Select the checkbox in the header row to make it the default for all profiles.
11. Click **Next**.
12. Choose a page layout option to determine what page layout displays for records with this record type:
 - To apply a single page layout for all profiles, select **Apply one layout to all profiles** and choose the page layout from the drop-down list.
 - To apply different page layouts based on user profiles, select **Apply a different layout for each profile** and choose a page layout for each profile.
13. Click **Save** to edit the values of the standard and custom picklists available for the record type, or click **Save and New** to create another record type.
 -  **Note:** When you create a new record type without cloning an existing one, the new record type automatically includes the master picklist values for both standard and custom picklists. You can then customize the picklist values for the record type.

Adding Record Types to Profiles

A profile can be associated with one or more record types. For example, a user who creates marketing campaigns for both hardware and consulting divisions can have both Hardware and Consulting record types available when creating a new campaign record. Assign record types to profiles when creating the record type or via the profile.

-  **Tip:**
 - When more than one record type is available, choose a default.

- The default record type for a profile is indicated in parenthesis.
- If each profile is associated with a single record type, users will never be prompted to select a record type when creating new records.

Setting Personal Options for Record Types

Users can set an option to automatically use their default record type when creating new records, or they can be prompted for a record type every time they create a new record.

1. In the user's personal settings area, click **Record Type Selection**.
2. Check the appropriate box to automatically use the default record type when creating a new record of that type. All unchecked boxes in this list indicate that you prefer to select a record type.
3. Click **Save**.

When users convert, clone, or create records, the following special considerations apply.

- When a user converts a lead, the new account, contact, and opportunity records automatically use the default record type for the owner of the new records.
- When a user clones a record, the new record has the record type of the cloned record. If the record type of the cloned record isn't available in the user's profile, the new record adopts the user's default record type.
- When a user creates a new case or lead and applies assignment rules, the new record can keep the creator's default record type or take the record type of the assignee, depending on the case and lead settings specified by the administrator.

 **Tip:** Need help getting started? Go to www.salesforce.com/gettingstarted to access live webinars, videos, set- up series and more!