



TIPS & HINTS — PAGE LAYOUTS AND FIELD-LEVEL SECURITY

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

What are Page Layouts and Field-Level Security?

Page Layouts

- ◆ Control the layout and organization of fields, s-controls, 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, Team, and Professional Editions, control which fields users can access in list views, reports, Offline Edition, and when synchronizing data

Mini Page Layouts

- ◆ Control the layout and organization of fields, s-controls, related lists, and custom links on records in the mini view of the Console tab.
For more information on the console, see the Salesforce online help.
- ◆ 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 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.
- ◆ List buttons are available in the Mass Action drop-down list.
- ◆ 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, 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, Offline Edition, and when synchronizing data
- Search layouts control which fields display in search results, *lookup* dialogs, and the key lists on tab home pages. They also determine which standard and custom buttons display in list views and respect the field-level security settings from your page layouts.

Controlling Field Access

Three elements control which fields users can access:

- **Page Layouts** - Set which fields are required, read only, visible.
- **Field-level security** - Further restrict users' access to fields. These security settings override any more permissive field access settings in page layouts.
- **User permissions** - Some permissions control access to fields. For example, users with the "Edit Read Only Fields" permission can always edit read-only fields regardless of any other settings.



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, Team, and Professional Edition Organizations:

1. Create any custom fields, s-controls, custom buttons, or custom links for each tab.
2. Define page layouts and related lists for each tab.
Go to **Setup | Customize**, select a tab, click **Page Layout**.
All users automatically use the same page layout for each tab.
3. Optionally, if you have a Professional Edition organization and you plan on using the Console tab, define mini page layouts to organize how fields, s-controls, and related lists will display in the console's mini view.
Go to **Setup | Customize**, select a tab, click **Page Layouts**, select a page layout, and then click **Mini Page Layout**.

For Enterprise, Unlimited, and Developer Edition Organizations:

1. Create any custom fields, s-controls, custom buttons, or custom links for each tab.
Go to **Setup | Customize**, select a tab, click **Fields** to create custom fields.
Go to **Setup | Build | Custom S-Controls** to design your s-controls.
Go to **Setup | Customize**, select a tab, click **Buttons and Links** to define your custom buttons and links.
2. Create any custom profiles. Field-level security applies on a profile-by-profile basis, so create profiles if different users need different field access.
Go to **Setup | Manage Users | Profiles**.
3. 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.
Go to **Setup | Customize**, select a tab, click **Record Types**.
4. Assign which record types are available to users with different profiles.
Go to **Setup | Manage Users | Profiles**.
5. Set the field-level security for profiles to restrict access to specific fields.
Go to **Setup | Manage Users | Profiles**.
6. Define page layouts to organize your pages and related lists.
Go to **Setup | Customize**, select a tab, click **Page Layouts**.
7. Optionally, if your organization plans to use the Console tab, define mini page layouts to organize how fields, s-controls, and related lists will display in the console's mini view.
Go to **Setup | Customize**, select a tab, click **Page Layouts**, select a page layout, and then click **Mini Page Layout**.
8. Assign page layouts to users based on profiles and record types. This determines which layouts users will see when viewing different record types.
Go to **Setup | Customize**, select a tab, click **Page Layouts | Page Layout Assignment**.
9. Check the field accessibility to verify that all field access settings are correct.
Go to **Setup | Customize**, select a tab, click **Fields**, select a field, click **View Field Accessibility**.

Best Practices

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

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 (described at right). Hover over any field access setting to view the cause - page layout or field-level security. Then click the setting to modify.