

Configuring HandsOn Connect Lightning (Pt 2) Page Layouts

If you wish to continue to use the Page Layouts that you have been using in Classic -- no action is needed on your part. If you've added custom fields, or customized the page layouts to your satisfaction, then you may just want to leave them in place.

However -- we have included new page layouts as part of HOC Lightning - and if you like, you can assign these page layouts to your system admin and staff profiles so they can take advantage of the newer, nicer page layouts (that remove fields no longer used in HOC 3 - relabel sections, etc.).

Best practice would be to use the new 3.1 layouts, use 'save as' to create a new copy, and add your custom fields to the 3.1 layouts. Then you'll have the latest of everything including your personal customizations. Ultimately the choice of what page layouts you want to use are yours!

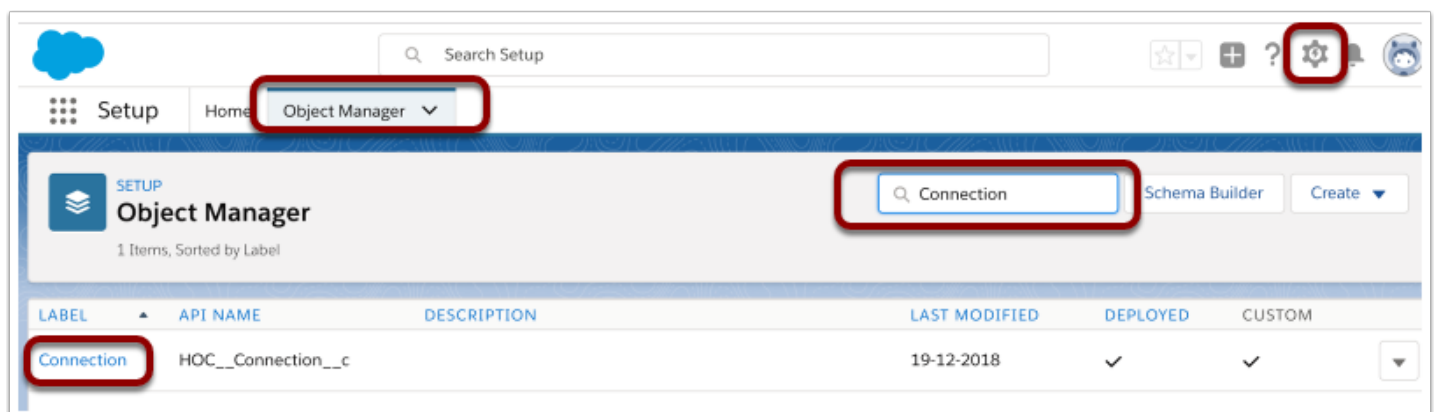
How to assign new page layouts

In Lightning - the easiest way to update objects is to go to Setup (click on the cog and select setup - and then use the Object Manager to get to the object of your choice. Let's select 'Connection' and see how to update the page layouts:

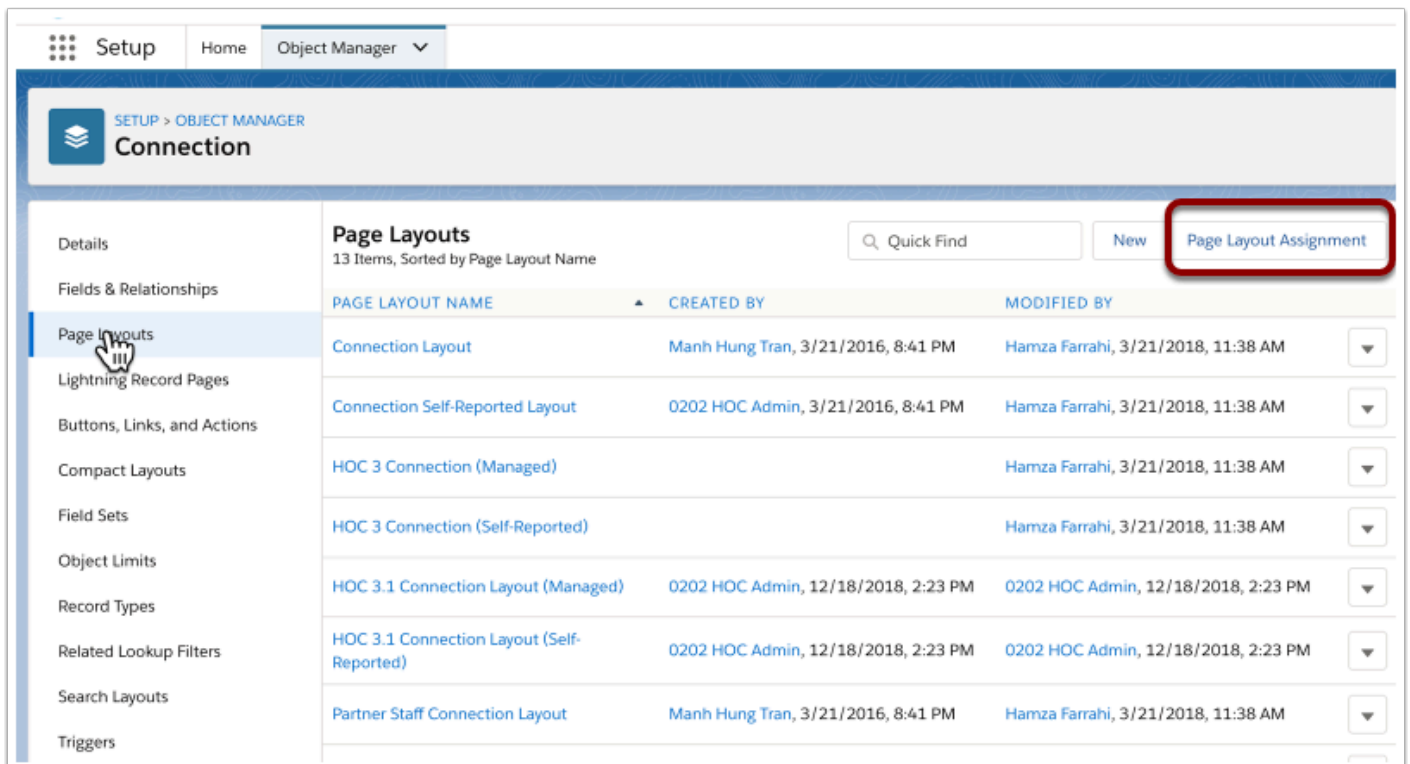
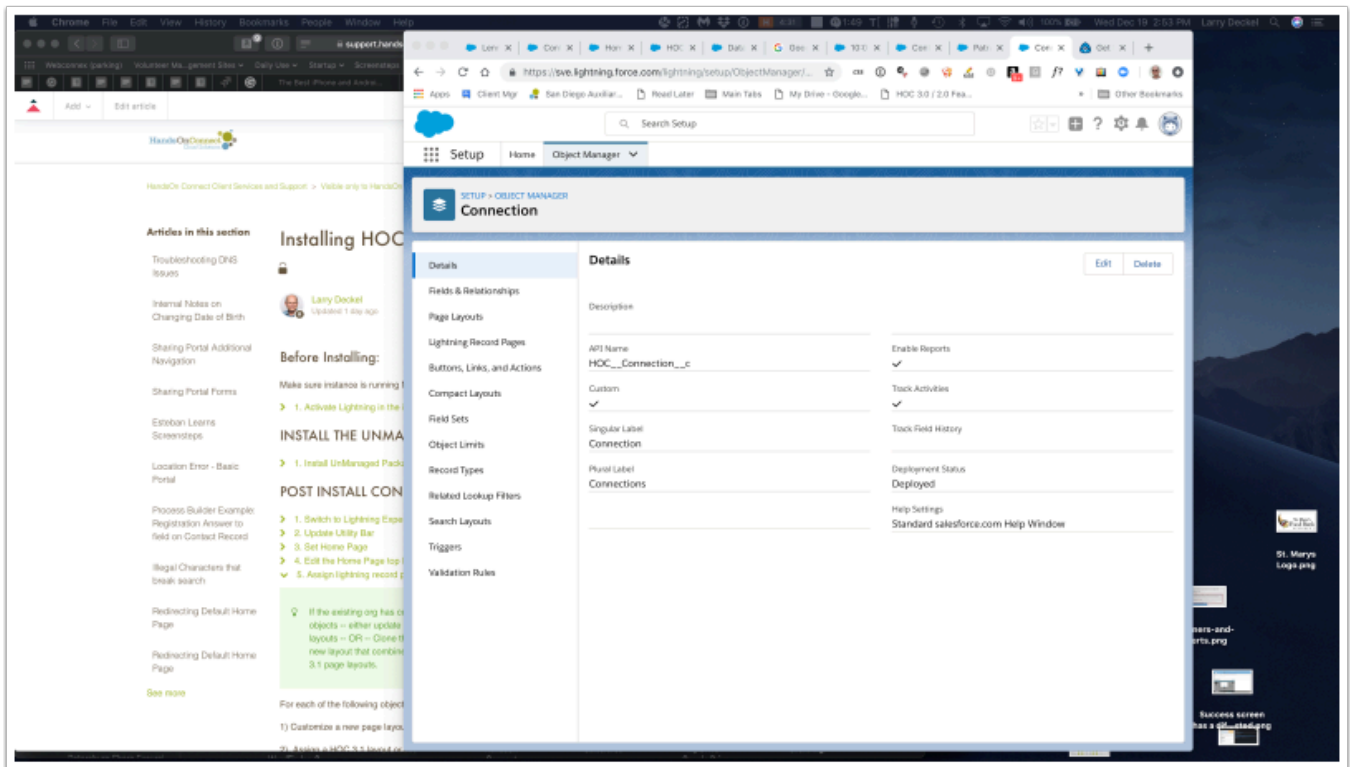
Click on Object Manager Tab. (FYI - the "Home Tab" in setup gets you to all the other setup items.

Either scroll and find the object you want to work with,, or type its name in the quick search box.

When you've found your object, click on it to open the object view:



The object view shows all the elements of an object in the left column. Click on "Page Layouts" to access the page layouts for lightning.



You may find a lot of old page layouts here. You can safely ignore them (or delete them later if you feel like doing some housekeeping).

The New Page Layouts we've made available are labeled "HOC 3.1....."

Connections have two page layouts (one for Managed connections, one for Self-reported connections). To see your current page layout assignments, and make changes, click on the "Page Layout Assignment" button.

You'll then see each profile - and which page layout they are using for the "Managed" record type and which they are using for the "Self-Reported" connection type.

In the example below we see the current assignments for the two profiles HOC uses (system administrator and Staff) are currently using the page layouts. Staff Connection Layout v3 (for Managed connections) and "Connection Self-Reported Layout" for self-reported connections. (Choose additional profiles if you have other profiles using HandsOn Connect and update those profiles too!)

Click on Edit Assignment:

Profiles	Record Types (1-3 of 3)		
	Master	Managed	Self-Reported
Chatter Free User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Chatter Moderator User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Content Only User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Contract Manager	Connection Layout	Connection Layout	Connection Self-Reported Layout
Customer Portal Manager	Connection Layout	Connection Layout	Connection Self-Reported Layout
Customer Portal Manager Custom	Connection Layout	Connection Layout	Connection Self-Reported Layout
Customer Portal User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Employee Coordinator	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3	Connection Self-Reported Layout
Force.com - One App User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Gold Partner User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Marketing User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Overage Authenticated Website User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Overage Customer Portal Manager Custom	Connection Layout	Connection Layout	Connection Self-Reported Layout
Partner Staff	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3
Partner Staff Named User	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3
Partner Staff v2	Connection Layout	Connection Layout	Connection Self-Reported Layout
Read Only	Connection Layout	Connection Layout	Connection Self-Reported Layout
Solution Manager	Connection Layout	Connection Layout	Connection Self-Reported Layout
Staff	Staff Connection Layout v3	Staff Connection Layout v3	Connection Self-Reported Layout
Standard Platform User	Connection Layout	Connection Layout	Connection Self-Reported Layout
Standard User	Connection Layout	Connection Layout	Connection Self-Reported Layout
System Administrator	Staff Connection Layout v3	Staff Connection Layout v3	Connection Self-Reported Layout
Volunteer	Connection Layout	Connection Layout	Connection Self-Reported Layout
Volunteer Leader	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3
Volunteer Leader Named User	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3	Partner Staff Connection Layout v3
Volunteer Leader v2	Connection Layout	Connection Layout	Connection Self-Reported Layout

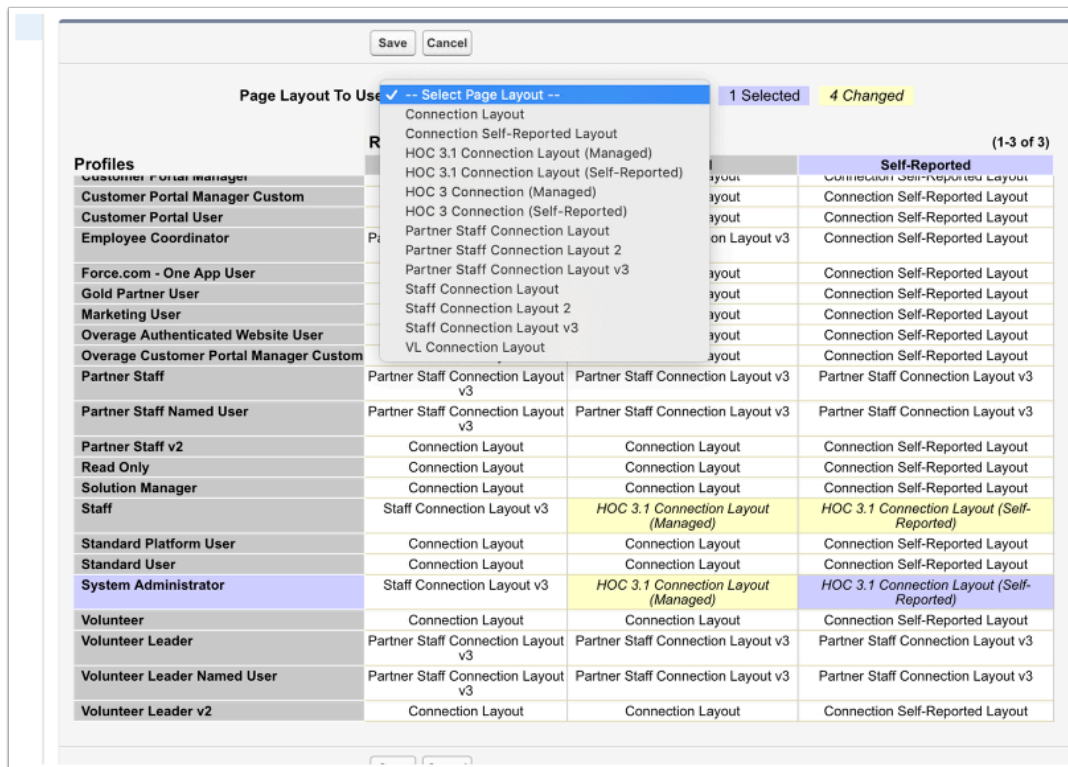
To update the page layout - click on the profile and page layout and then use the picklist to replace it with the new page layout.

For connections the new layouts are:

HOC3.1 Connections (Managed). (for the managed record type)

HOC3.1 Connections (Self Reported) - for the self-reported record type.

Update the page layouts for both record types, and both profiles, and then click Save. (Your changes will appear in yellow before you save.)



! Keep in mind - you do not have to change your page layouts assignments if you like the way they looked in the past or have done a lot of customization to your page layouts.

OR - you can compare the new layouts to your older, customized layouts, and update either to create the page layout that works best for your organization.

For users who have not customized their page layouts at all, we do recommend that you switch to the new page layouts (they are nicer and have improved related lists, etc.). ALSO -- on older page layouts you may find yourself missing certain quick actions in Lightning.

💡 If you do not have HOC 3.1 page layouts in your instance, then use the HOC 3 page layouts.

Also - you may see two each of a number of the HOC3 Page Layouts. One of these is part of the managed package (and can't be edited), and one of these is unmanaged (and can be edited). The managed ones say 'created by HOC Admin'. Use the ones without a created by, as these are more flexible. And feel free to rename them so you know its YOUR version of this page layout :-)

But if the 3.1 layouts are available - use them!

Page Layouts				View	Page Layout Assignment
15 Items, Sorted by Page Layout Name					
PAGE LAYOUT NAME	CREATED BY				
Connection Layout	Ruchie Singh, 3/29/2017, 7:42 AM				
Connection Self-Reported Layout	0219 HOC HAdmin, 3/29/2017, 7:42 AM				
HOC 3 Connection (Managed)	0219 HOC HAdmin, 3/29/2017, 7:42 AM	0219 HOC HAdmin, 3/29/2017, 7:42 AM			
HOC 3 Connection (Managed)					
HOC 3 Connection (Self-Reported)	0219 HOC HAdmin, 3/29/2017, 7:42 AM	0219 HOC HAdmin, 3/29/2017, 7:42 AM			
HOC 3 Connection (Self-Reported)					
HOC 3.1 Connection Layout (Managed)					
HOC 3.1 Connection Layout (Self-Reported)					
Partner Staff Connection Layout	Ruchie Singh, 3/29/2017, 7:42 AM	0219 HOC HAdmin, 3/29/2017, 7:42 AM			
Partner Staff Connection Layout 2	0219 HOC HAdmin, 3/29/2017, 7:42 AM	0219 HOC HAdmin, 3/29/2017, 7:42 AM			

This one is part of the HOC package and can not be customized.

This one is not part of the package and can be customized. So use this one :-)

If you decide to use the updating 3.1 page layouts (recommended) - use the object manager and update page layout assignments for each of the following objects:

- **Connections.** (managed and self-reported record types)
- **Recurrence**
- **Volunteer Event**
- **Volunteer Team**
- **Volunteer Team Member.**
- **Volunteer Opportunities** and **Occurrences** each have two choices of page layout -- (regular) and advanced. Use the advanced layout if you want to have ALL the advanced features available in your page layouts. Use the other 3.1 layout if you are not using any advanced features. (Tip: if you only want SOME of the advanced features choose the advanced layout - do a save as to create your own version - and remove the fields for features you are not using!)
- **Organization** (Account). (Update both the nonprofit and business record types. Don't update for household, Individual or other record types)
- **Contact.** (set for volunteer record type - choose between a standard layout or the advanced one -- if you're using NPSP then choose HOC 3 Contact - NPSP if its available)

Here's a quick video showing how quickly you can change the page layout for each object listed above:

<https://screencast.com/t/1gC1JhiSHm>

Need Help?

Come to one of our [daily scheduled labs](#) and we can help you configure and set up lightning