

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:

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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.

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	lliegal Characters that break search	 3. Set Home Page 4. Edit the Home Page top I 5. Assign lightning record p 	Triggers Validation Rules			St. Marys Logs prig
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8	See more	For each of the following object				Success screen
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SETUP > OBJECT MANAGE	R			
Connection	N 2 111 AU 020 & 11/2 N 2	111 -216-2016 MBAS 2011 -		233
Details	Page Layouts 13 Items, Sorted by Page Layout Name	Q, Quick Find	New Page Layout Assignment	ner
Fields & Relationships	PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Page Wouts	Connection Layout	Manh Hung Tran, 3/21/2016, 8:41 PM	Hamza Farrahi, 3/21/2018, 11:38 AM	
Lightning Record Pages Buttons, Links, and Actions	Connection Self-Reported Layout	0202 HOC Admin, 3/21/2016, 8:41 PM	Hamza Farrahi, 3/21/2018, 11:38 AM	
Compact Layouts	HOC 3 Connection (Managed)		Hamza Farrahi, 3/21/2018, 11:38 AM	
Field Sets	HOC 3 Connection (Self-Reported)		Hamza Farrahi, 3/21/2018, 11:38 AM	
Object Limits Record Types	HOC 3.1 Connection Layout (Managed)	0202 HOC Admin, 12/18/2018, 2:23 PM	0202 HOC Admin, 12/18/2018, 2:23 PM	
Related Lookup Filters	HOC 3.1 Connection Layout (Self- Reported)	0202 HOC Admin, 12/18/2018, 2:23 PM	0202 HOC Admin, 12/18/2018, 2:23 PM	
Search Layouts	Partner Staff Connection Layout	Manh Hung Tran, 3/21/2016, 8:41 PM	Hamza Farrahi, 3/21/2018, 11:38 AM	
Triggers				

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 se 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:

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

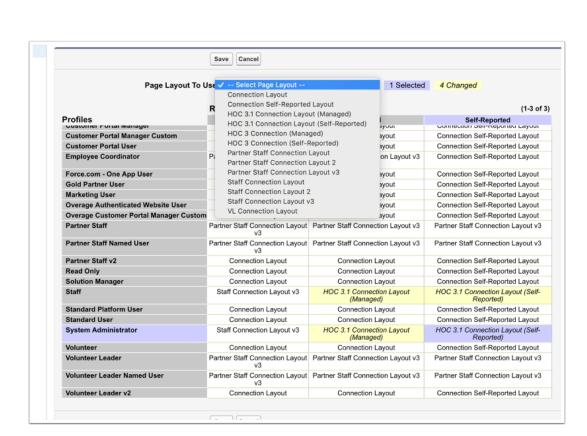
To update the page layout - click on the profile and page layout and then use the picklist to replace it with the new page layout.

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.)



HandsOnConnect

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.

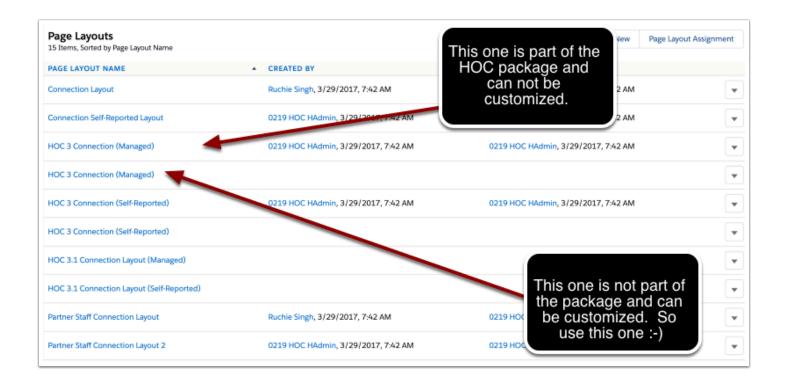
For users who have not customized their page layouts at all, we do recommend that you switch to the new page layouts (they are nicer and have improved related lists, etc.). ALSO -- on older page layouts you may find yourself missing certain quick actions in Lightning.

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!



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