

Add SMS Button to Layouts

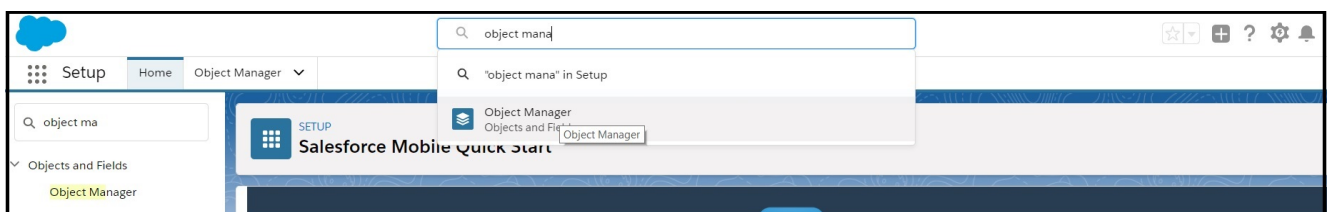
After creating the SMS button, you need to add the buttons to the record layout such as Contacts, Leads, Opportunities, and so on.

- To add the button to the page layout in Salesforce Lightning, you need to use the Object Manager.
- To add the button to the page layout in Salesforce Classic, you need to use the Quick Find/ Search field to search for the object page and add the button.


You can add the single SMS button to the record page layout for an object such as Contacts, Leads, Opportunities, and so on. The adding of the button is done through the Page Layout option of the object.

Add the Single SMS Button to a Layout Page in Salesforce Lightning

1. From the Salesforce navigation on the top right, click **Setup**.
2. Select **Object Manager** by:
 - Using the **Quick Find / Search field**, or
 - Selecting **Objects and Fields > Object Manager**.



3. Click a record page. Record page can be Contacts, Opportunities, Leads, and so on.




Search S

Setup

Home

Object Manager ▼



SETUP

Object Manager

51+ Items, Sorted by Label

Alpha SenderID Map	smagicinteract__Alpha_SenderID_Map__c
Asset	Asset
Asset Relationship	AssetRelationship
Campaign	Campaign
Campaign Member	CampaignMember
Case	Case
Child Object Config	smagicinteract__Child_Object_Config__c
Contact	Contact

4. Click **Page Layouts**.

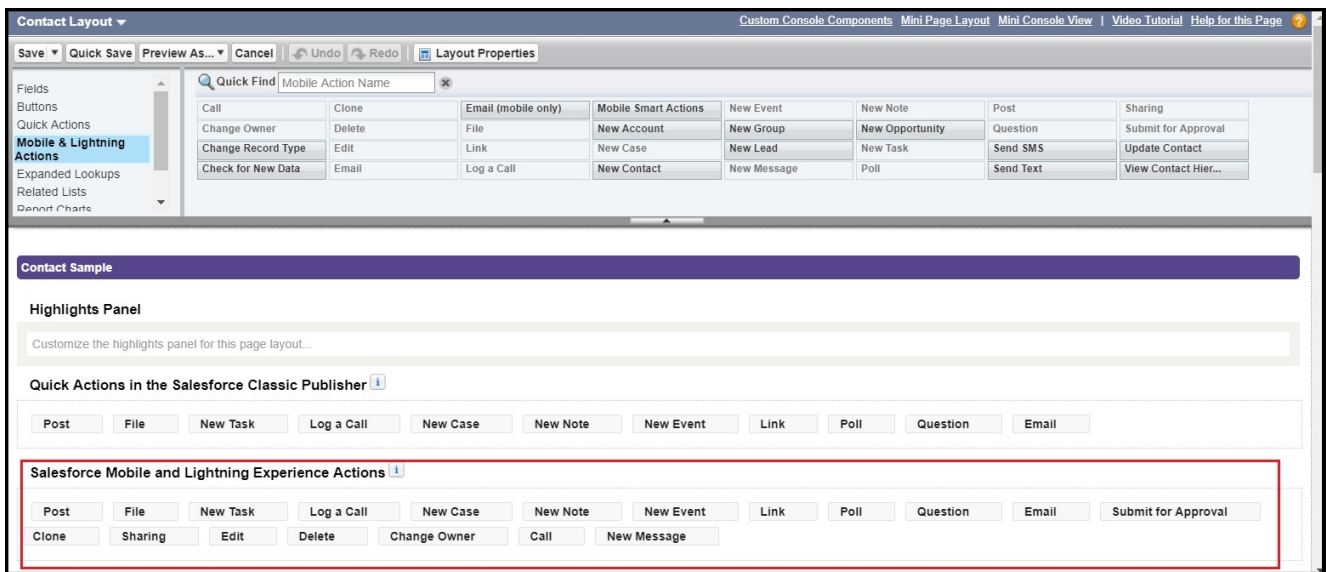
6. Select **Mobile & Lightning Actions**.



7. Select the **SMS button** from the **Mobile & Lightning Actions** section.



8. Drag and drop the **SMS button** in the **Salesforce Mobile and Lightning Experience Actions** section.

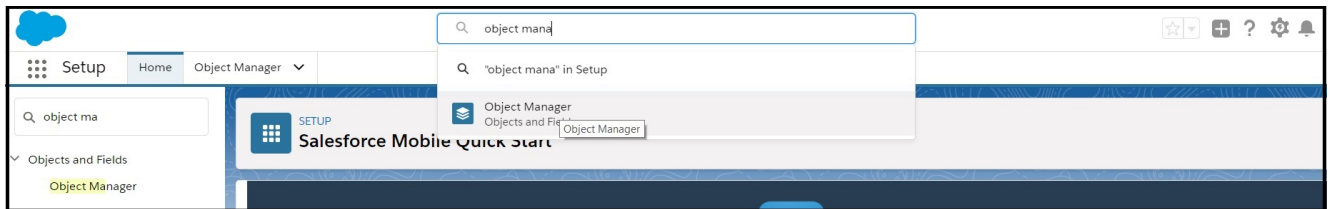


Add the Bulk SMS Button to a Layout in Salesforce Lightning

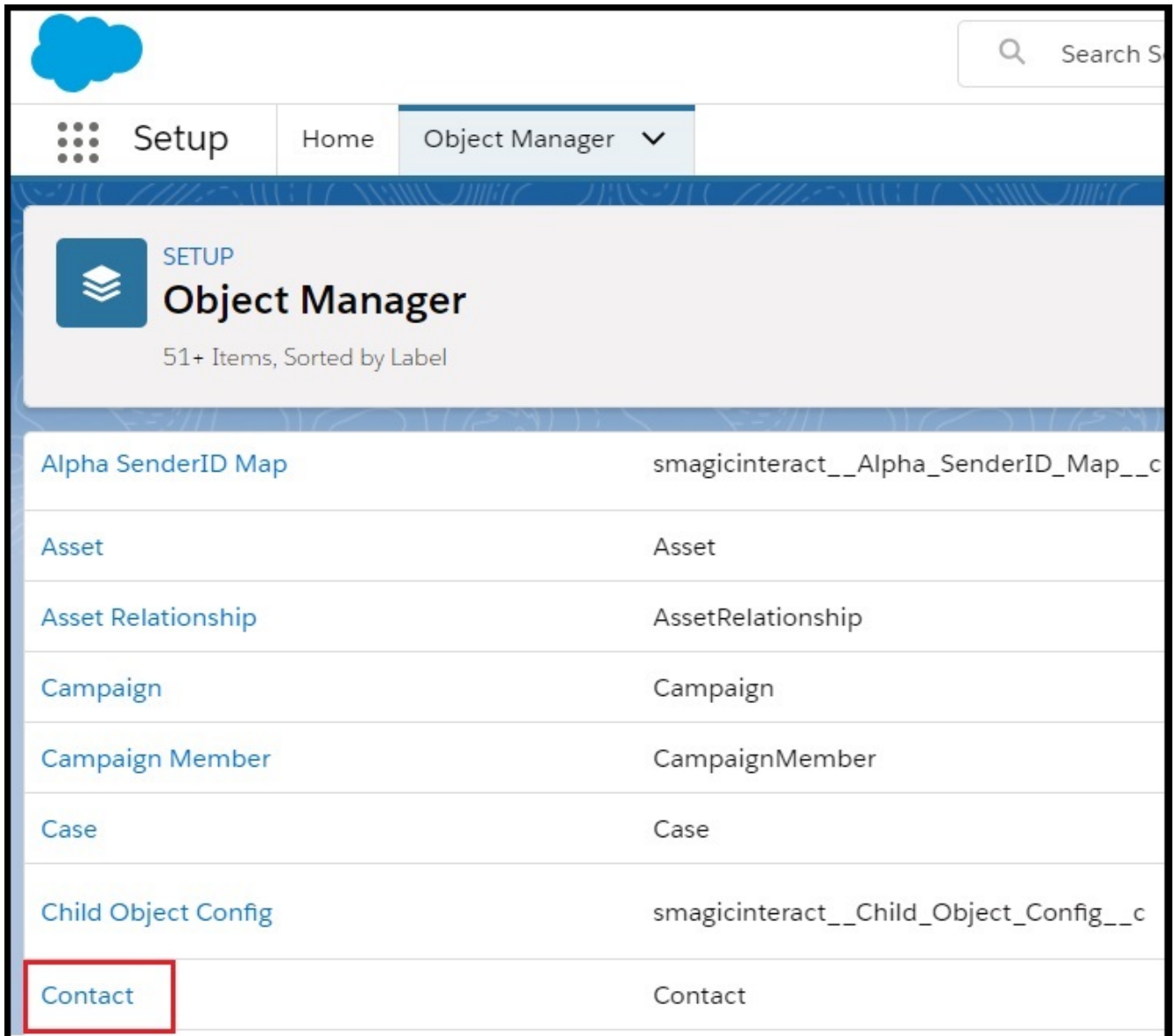
1. From the Salesforce navigation on the top right, click **Setup**.

2. Select **Object Manager** by:


- Using the **Quick Find / Search field**, or
- Selecting **Objects and Fields > Object Manager**.



3. Click a record page. Record page can be Contacts, Opportunities, Leads, and so on.



4. Click **Search Layouts**.



SETUP > OBJECT MANAGER

Contact

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Triggers

Search Layouts

6 Items, Sorted by Layout

LAYOUT

List View

Lookup Dialogs

Lookup Phone Dialogs

Search Filter Fields

Search Results

Tab

5. Click **Edit** for the record **List View**.

Search Layouts

6 Items, Sorted by Layout

Q Quick Find

LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED	
List View	N/A	Open in Quip, New, Add to Campaign, Clean, Add to Campaign, Add to Call List, Send List Email	<div>Edit</div>
Lookup Dialogs	Name, Account Name, Account Site	N/A	

6. Select the **SMS button** in the **Available Buttons** list under the **Custom Buttons** section.

Edit Search Layout Help for this Page

Contacts List View

Customize the buttons on the Contacts list view:

- To remove any standard buttons, remove the check next to the standard button name.
- To add custom buttons, select them and click Add.

Standard Buttons

- ☒ Open in Quip [OpenListinQuip]
- ☒ New [NewContact]
- ☒ Add to Campaign [AddToCampaign]
- ☒ Clean [ListClean]
- ☒ Add to Campaign [MassAddToCampaign]
- ☒ Add to Call List [CreateCallList]
- ☒ Send List Email [SendListEmailAction]

Custom Buttons

Available Buttons

Send Bulk SMS

Selected Buttons

--None--

Add
Remove

Up
Down

List View Actions in Lightning Experience

[New Quick Action](#)

Save Cancel

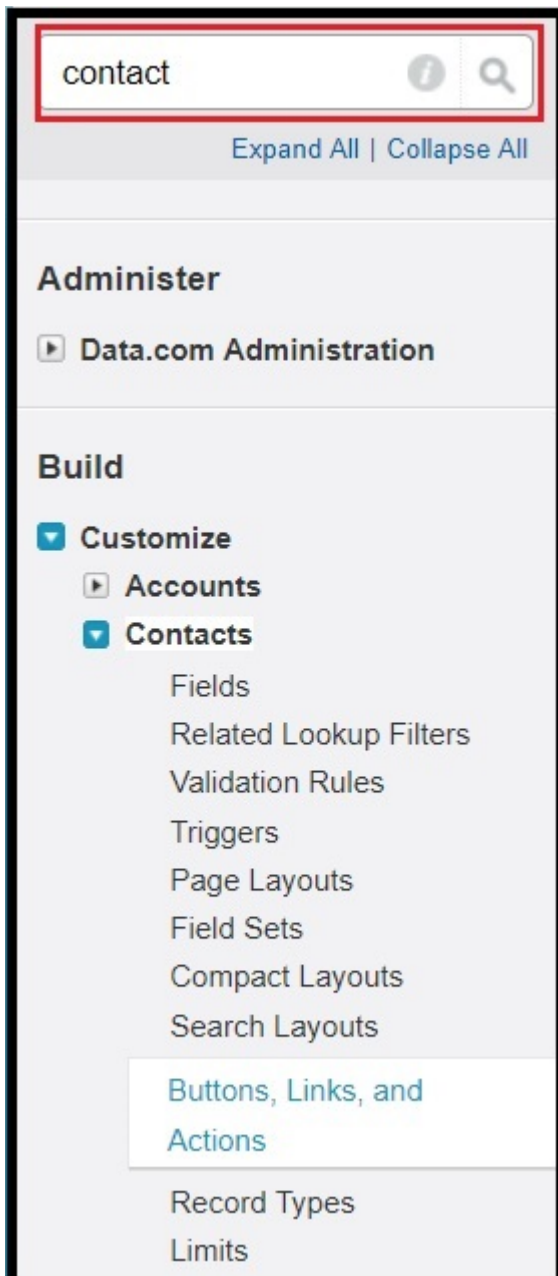
7. Click **Add** to move the **SMS button** from the **Available Buttons** list to the **Selected Buttons** list.

8. Click **Save**.

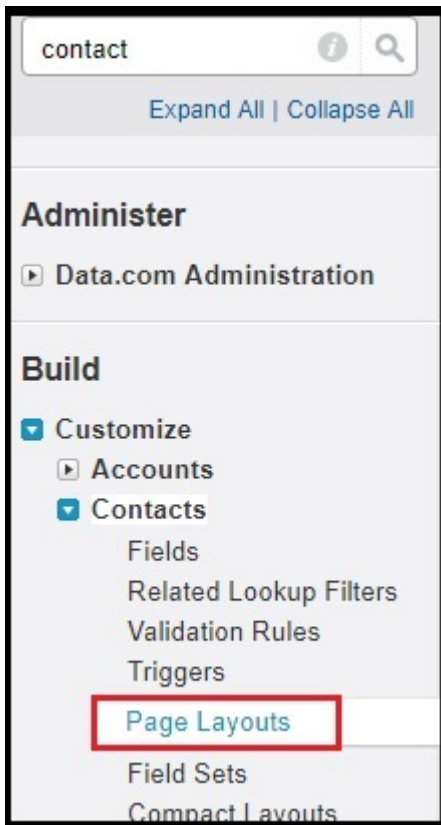
Add the Single SMS Button to a Layout Page in Salesforce Classic

1. From the Salesforce navigation on the top right, click **Setup**.

2. Select an object by using the **Quick Find/ Search** field. The object can be Contacts, Opportunities, Leads, and so on.



3. Click **Page Layouts**.



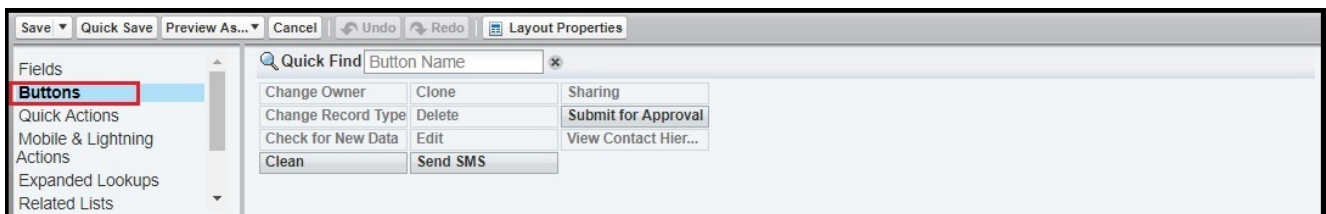
4. Click **Edit** for the record layout.

Contact Page Layout

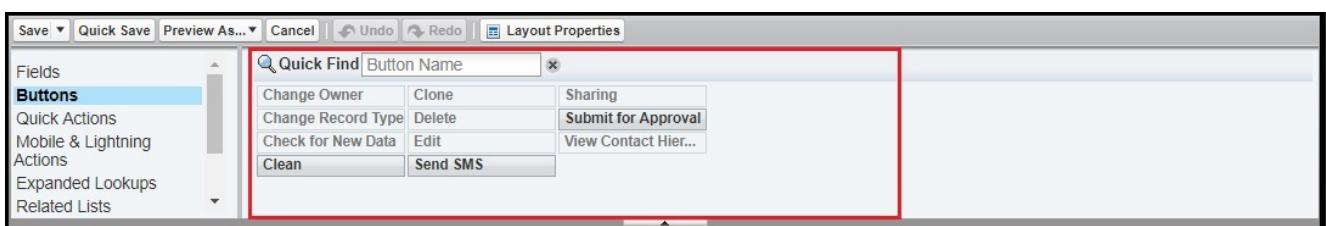
This page allows you to create different page layouts to display Contact data.
After creating page layouts, click the Page Layout Assignment button to control which page layout users see by default.

Contact Page Layouts			
Action	Page Layout Name	Created By	Modified By
Edit Del	Contact (Marketing) Layout	Sumanto Sinha 8/22/2018 4:12 AM	Sumanto Sinha 8/22/2018 4:12 AM
Edit Del	Contact (Sales) Layout	Sumanto Sinha 8/22/2018 4:12 AM	Sumanto Sinha 8/22/2018 4:12 AM
Edit Del	Contact (Support) Layout	Sumanto Sinha 8/22/2018 4:12 AM	Sumanto Sinha 8/24/2018 5:07 AM
Edit Del	Contact Layout	Sumanto Sinha 8/22/2018 4:12 AM	Sumanto Sinha 8/24/2018 3:27 AM

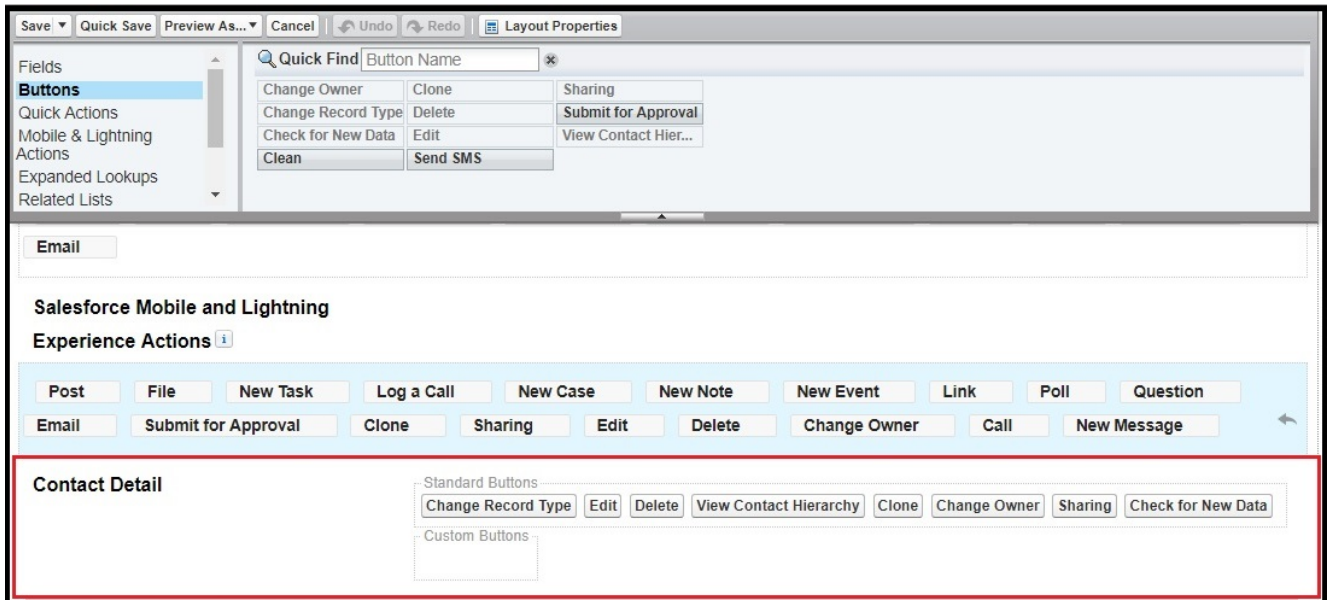
5. Click **Buttons**.



6. Select the **SMS button** from the **Buttons** section.



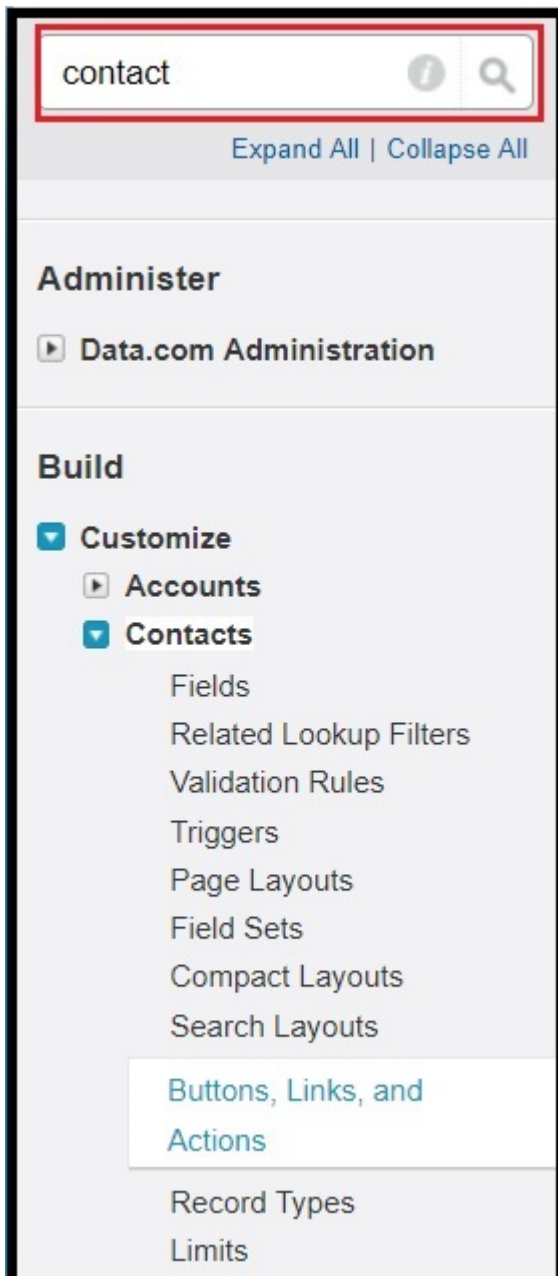
7. Drag and drop the **SMS button** in the **Salesforce Mobile and Lightning Experience Actions** section.



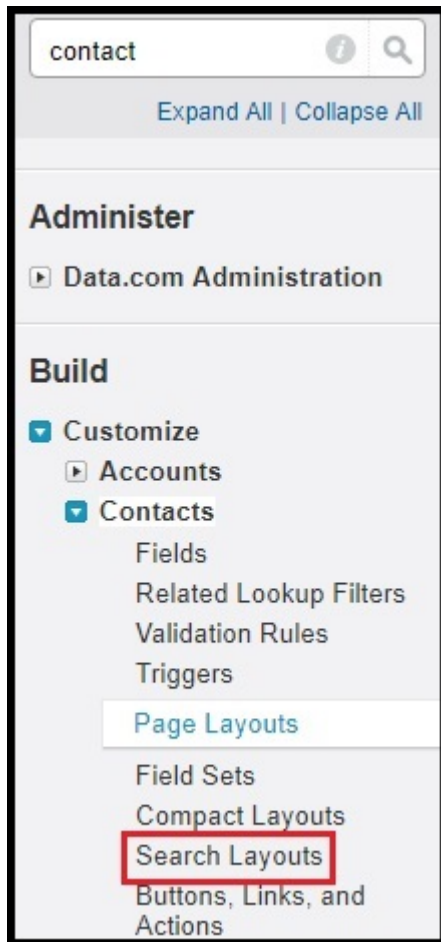
8. Click **Save**.

Add the Bulk SMS Button to a Layout in Salesforce Classic

1. From the Salesforce navigation on the top right, click **Setup**.
2. Select an object by using the **Quick Find/ Search** field. The object can be Contacts, Opportunities, Leads, and so on.



3. Click **Search Layouts**.



4. Click **Edit** for the record List View.

Contact Search Layouts Help for this Page

Search layouts allow you to select the standard and custom fields that are displayed in the following search features:

- Search Results Columns for search and tagging. [View example](#)
- Lookup Dialogs that pop up when you click the magnifying glass on Lookup fields. [View example](#)
- Lookup Phone Dialogs that pop up when you click the magnifying glass on a SoftPhone dial pad. [View example](#)
- Recently viewed, modified, and created records lists displayed on tab home page. [View example](#)
- Search Results Filter Fields for search. [View example](#)

Search layouts also allow you to select the standard and custom buttons that are displayed in the following search features:

- Search Results for search and tagging.
- List Views for filtering records. [View example](#)

Action	Layout	Columns Displayed	Buttons Displayed	Modified By
Edit	Search Results	Name, Account Name, Account Site, Phone, Email, Contact Owner Alias		Sumanto Sinha 8/22/2018 4:12 AM
Edit	Lookup Dialogs	Name, Account Name, Account Site	N/A	Sumanto Sinha 8/22/2018 4:12 AM
Edit	Lookup Phone Dialogs	Name, Account Name, Account Site, Phone, Mobile, Home Phone, Other Phone, Asst. Phone	N/A	Sumanto Sinha 8/22/2018 4:12 AM
Edit	Contacts Tab	Name, Account Name, Phone	N/A	Sumanto Sinha 8/22/2018 4:12 AM
Edit	Contacts List View	N/A	Open in Quip, New, Add to Campaign, Clean, Add to Campaign, Add to Call List, Send List Email	Sumanto Sinha 8/22/2018 4:12 AM
Edit	Search Filter Fields	N/A	N/A	Sumanto Sinha 8/22/2018 4:12 AM

5. Select the **SMS** button in the **Available Buttons** list under the **Custom Buttons** section.

Edit Search Layout

Help for this Page

Contacts List View

Customize the buttons on the Contacts list view:

- To remove any standard buttons, remove the check next to the standard button name.
- To add custom buttons, select them and click Add.

Standard Buttons

☒ Open in Quip [OpenListInQuip]

☒ New [NewContact]

☒ Add to Campaign [AddToCampaign]

☒ Clean [ListClean]

☒ Add to Campaign [MassAddToCampaign]

☒ Add to Call List [CreateCallList]

☒ Send List Email [SendListEmailAction]

Custom Buttons

Available Buttons

Send Bulk SMS

Add

Remove

Selected Buttons

--None--

Up

Down

List View Actions in Lightning Experience

[New Quick Action](#)

Save

Cancel

6. Click **Add** to move the **SMS button** from the **Available Buttons** list to the **Selected Buttons** list.

7. Click **Save**.