Salesforce Certified Admin and App Builder

Lesson 17—Creating Buttons, Links, and Actions
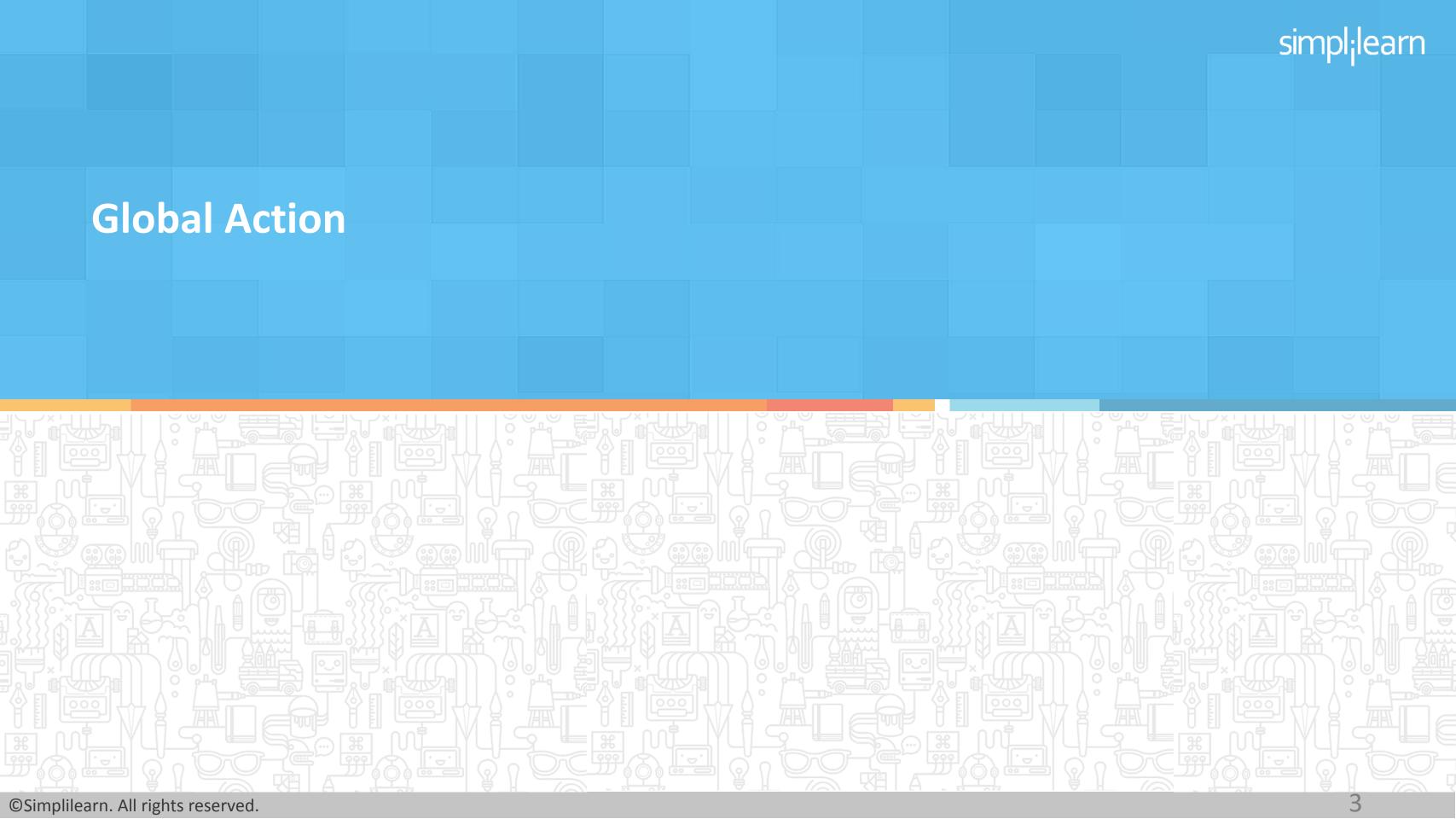
What You'll Learn

- Creating custom buttons

- Navigating quickly to pages with actions
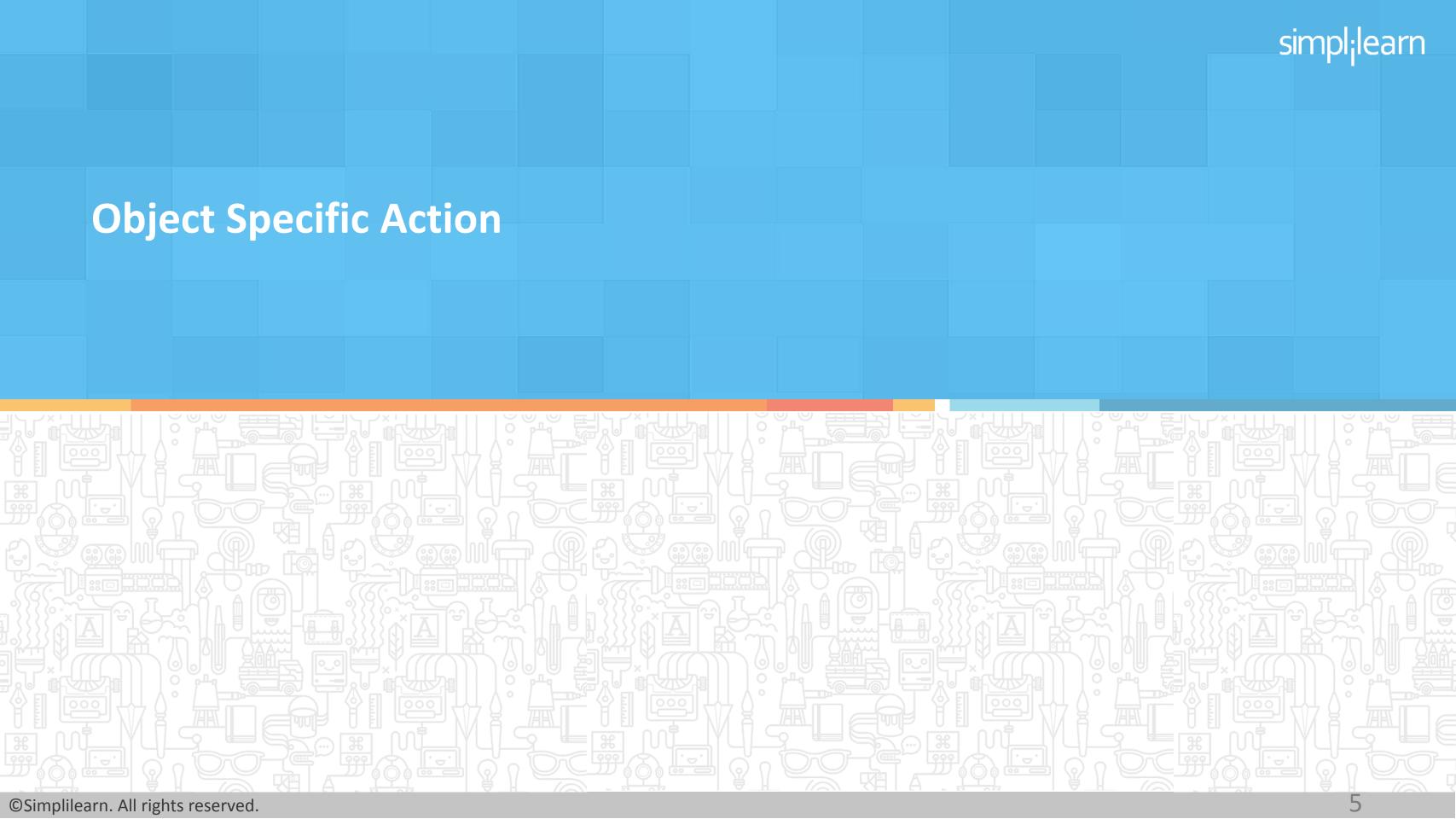
- Creating links on records

Global Action

Actions in Salesforce help user to perform the designated work faster. They are popular due to the benefits and flexibility they provide. The types of actions are global and object-specific.

Global Action:

- User can add global actions to any page that supports actions.

- User can use global actions to customize layouts that appear on global pages such as the Home page and the Chatter page.

- "Global create actions" helps users to create object records, but the new record has no relationship with other records.

Object Specific Action

Object-Specific Action

An object-specific action is created in the context of an object. An object-specific action can also be added to the page layouts for that object. Object-specific action create records that are automatically associated with related records. For example, you can add an object-specific action on the Account object that creates contacts.

There are five types of object-specific actions:

Object-specific actions
These create records that are automatically associated with related records.

Object-specific update actions
They make it easy for users to edit records.

Object-specific Log a Call actions
These let users enter notes about calls, meetings, or other interactions that are related to a specific record.

Object-specific custom actions
These actions are Visualforce pages or Canvas apps that let users interact with or create records that have a relationship to an object record.
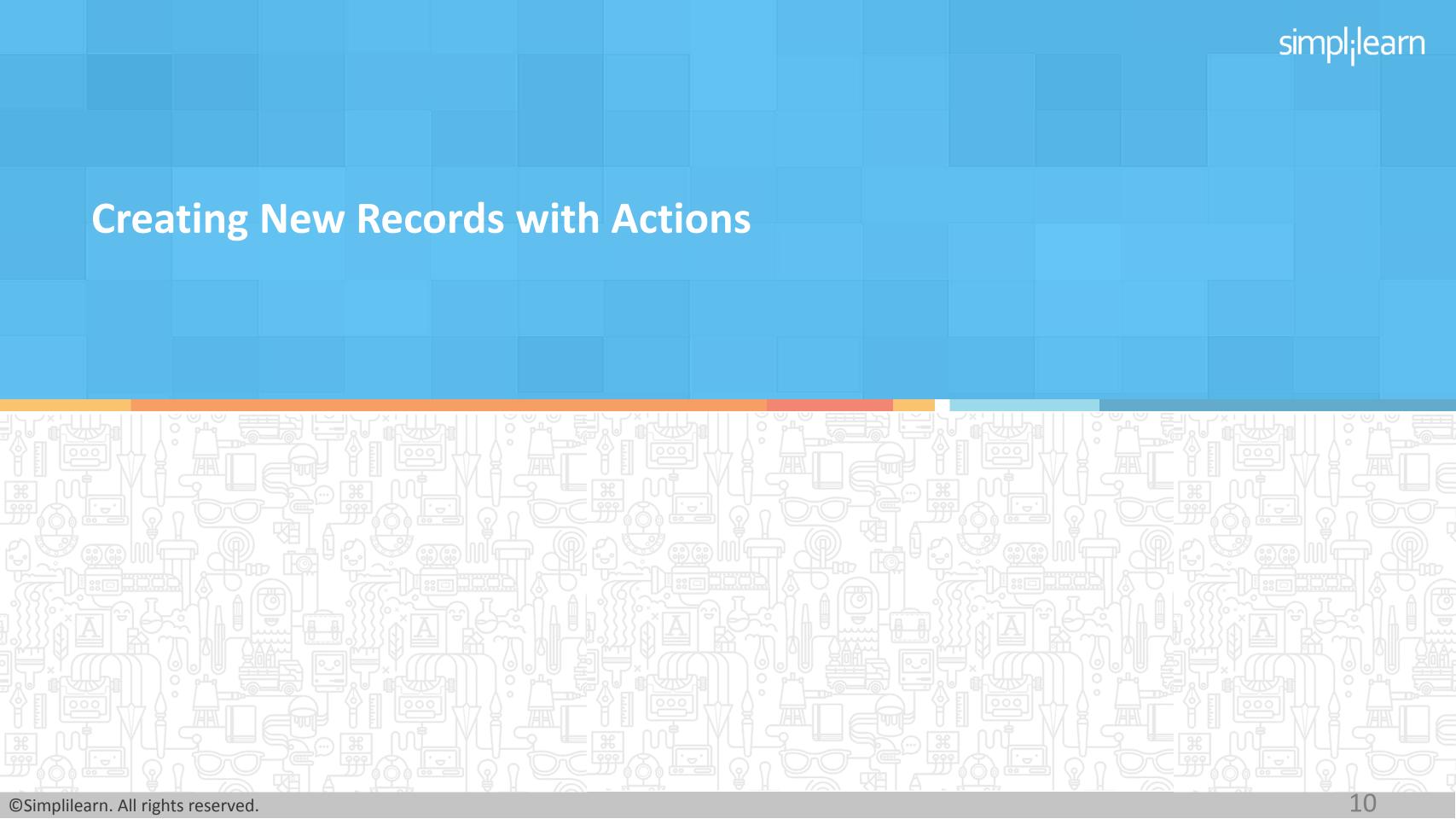
Send email actions
These are available only on cases; they give users access to a simplified version of the Case Feed Email action on Salesforce1.

Action Layout in Salesforce1

Just as object record pages have page layouts that can be customized, actions also have action layouts that can be customized.

You can add, remove, or reorder fields on the action layout to present only the essential items that your users need when they're performing the action.

To customize the layouts of your global actions, in Setup, enter Actions in the Quick Find box, then select Global Actions. Then click Layout next to a global action in the list.

To customize the layouts of your object-specific actions, from the management settings for an object, find Buttons, Links, and Actions.
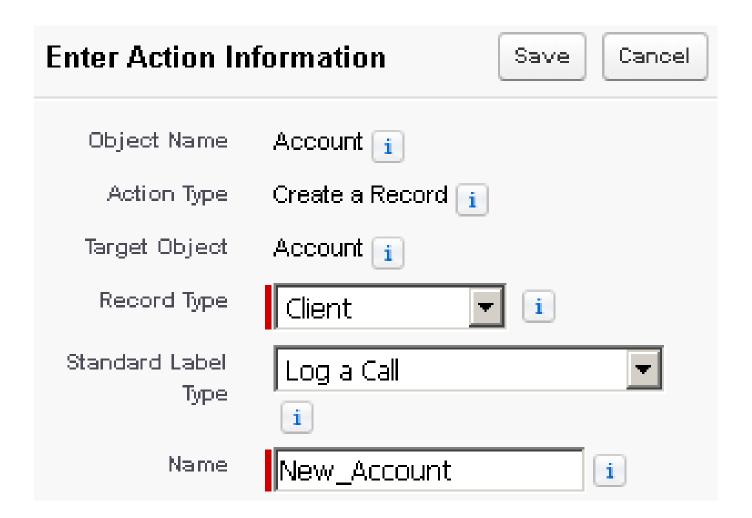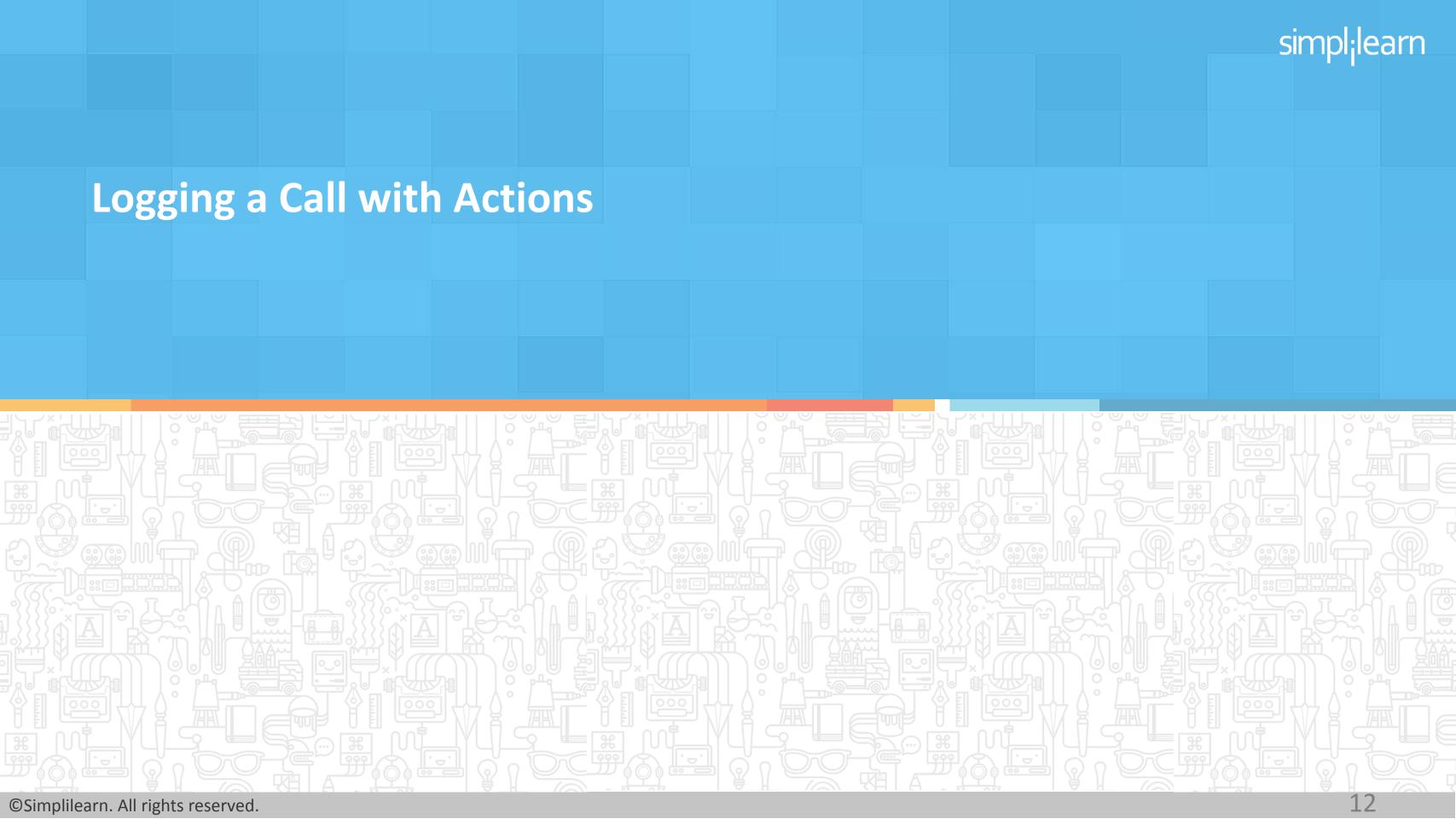
Creating New Records with Actions

Remember the following points when creating the

new records with actions button:

- Creates a button to generate a record.

- Best used for creating tasks and events.

- Record names are always required.

Logging a Call with Actions

Keep in mind the following points while

logging a call with actions:

- Provide a fast way to create a task with

  "Log a Call" in the subject.

- Ideal for salespeople or others that take

  inbound calls.

- Need to add to all page layouts on

  relevant objects.

Enter Action Information [Save] [Cancel]

Object Name   Account [i]

Action Type   Log a Call [i]

Standard Label   Log a Call
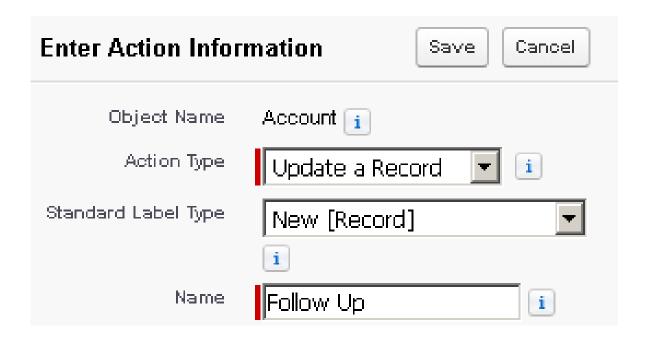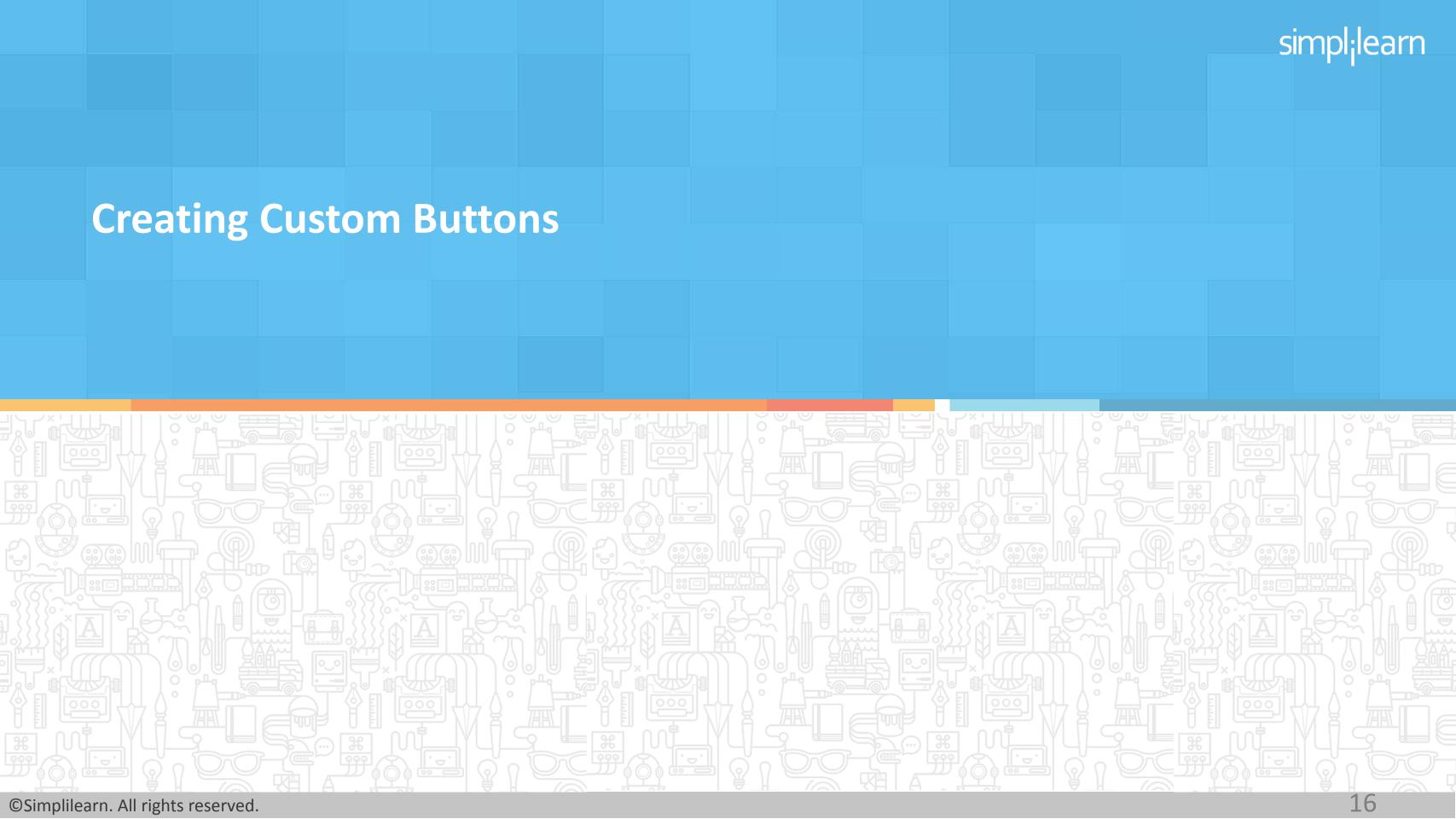Type
[i]

Name   Follow Up [i]

Updating a Record with Actions

Keep in mind the following points about updating records

with actions:

- Update specific fields on records using the update a

  record button.

- Not widely used, but it can be utilized when field changes

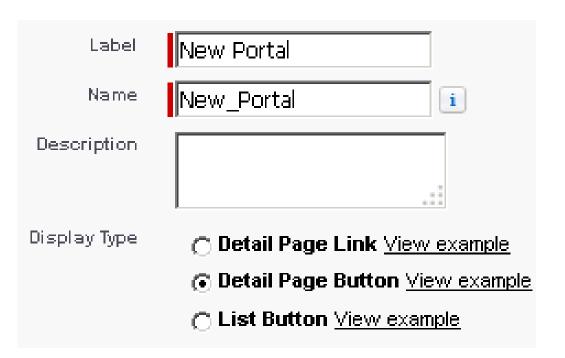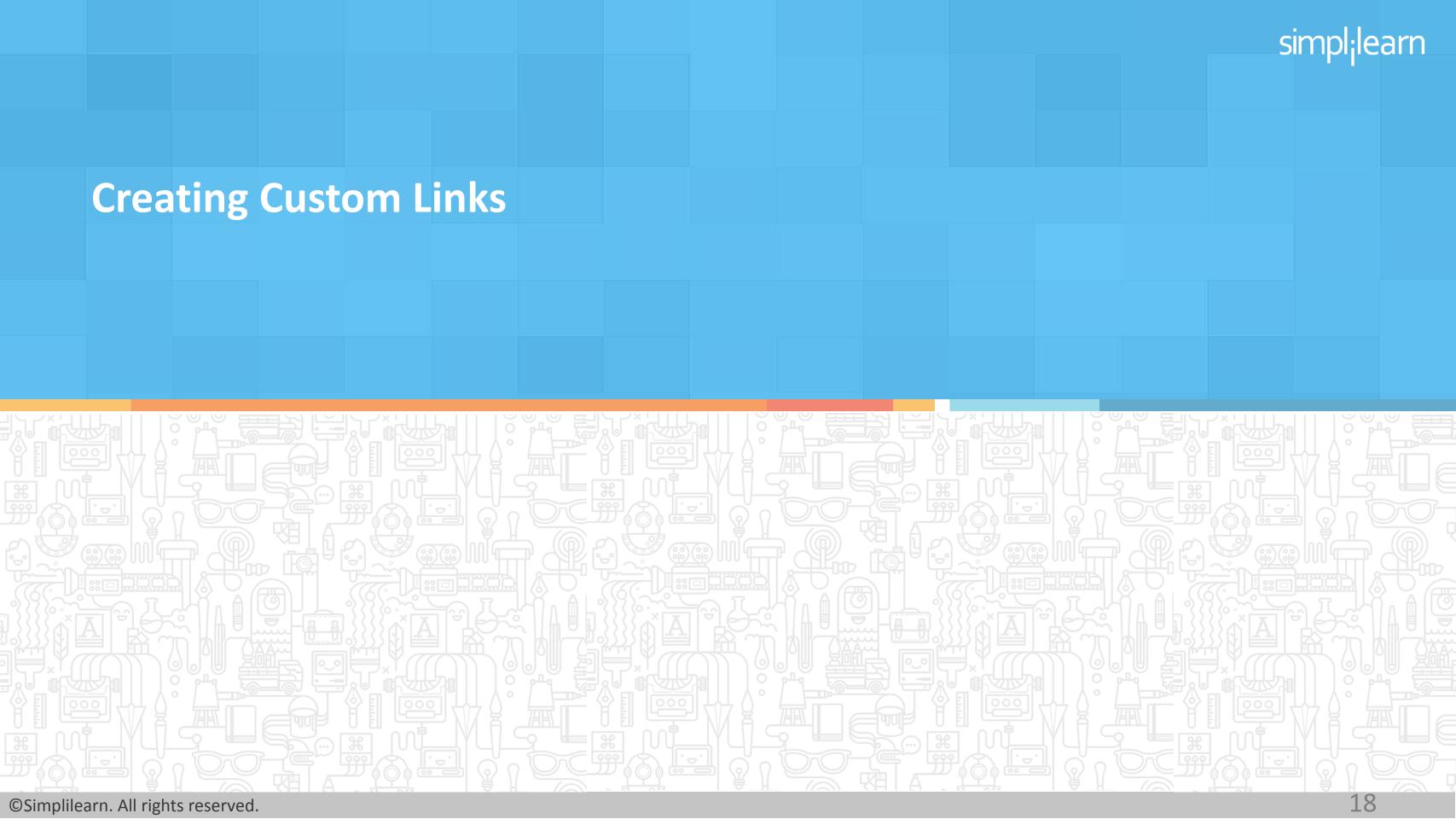 are required for specific scenarios.

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Creating Custom Buttons

Features of custom buttons are the following:

- Custom buttons can pass Salesforce URLs into the browser for a variety of effects.

- Automatically open windows and pre-populate fields from parent records.

- Open windows to outside systems, such as external web portals.
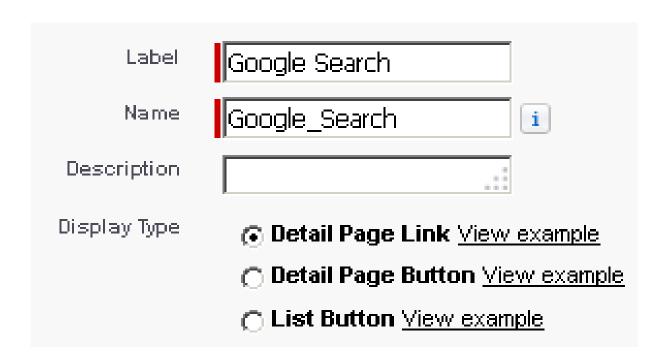
Creating Custom Links

Custom links are used to create:

- links to authenticated or unauthenticated sites.

- links to internal websites such as human resources documents or an intranet.

- pop-up windows with pre-populated search strings in Google or other search engines.

Quiz

QUIZ
1

Which Action is best for logging a call?

a.   Log a Call

b.   Create Custom Links

c.   Update a Record with Actions

d.   Create Custom Buttons

QUIZ 1

Which Action is best for logging a call?

a. Log a Call

b. Create Custom Links

c. Update a Record with Actions

d. Create Custom Buttons

The correct answer is **a**.

While there are several ways to create a task with the log a call subject, using the specific Log a Call option is the best practice.

QUIZ 2

Which option would you use to open a window to a new website?

a. Custom Link

b. Custom Button

c. Record Update

d. Record Creation

QUIZ 2

Which option would you use to open a window to a new website?

a. Custom Link

b. Custom Button

c. Record Update

d. Record Creation

The correct answer is **a**.

The best way to give users the option to open a new window is through a custom link.

QUIZ 3

Which feature would you use to create a button to update a field with one click?

a.   Apex Programming

b.   Workflow Rules

c.   Validation Rules

d.   Update a Record Action

QUIZ 3

Which feature would you use to create a button to update a field with one click?

a. Apex Programming

b. Workflow Rules

c. Validation Rules

d. Update a Record Action

The correct answer is **d**.

The best option is to use the Update a Record Action.

QUIZ 4	Which Salesforce technology would you use to create a record?

a. Create a Record Action

b. Apex Programming

c. Workflow Rule

d. Schema Builder

| QUIZ 4 | Which Salesforce technology would you use to create a record? |

a.   Create a Record Action

b.   Apex Programming

c.   Workflow Rule

d.   Schema Builder

The correct answer is **a**.

Using the Create a Record Action is the best choice when creating a new record automatically.

QUIZ 5

What button should an app builder use to create a new opportunity automatically?

a. Create a New Record Action

b. Workflow Rule

c. Schema Builder

d. Visualforce

QUIZ 5

What button should an app builder use to create a new opportunity automatically?

a. Create a New Record Action

b. Workflow Rule

c. Schema Builder

d. Visualforce

The correct answer is **a**.

The best option is to use the Create a New Record Action.

Knowledge Check

Case Study

Scenario | Analysis | Solution

United Containers relies heavily on repeat customers for revenue. Salespeople are facing difficulties while creating records from past orders. This is causing frustration and even data-entry mistakes. Repeat orders should have the same line items as original orders.

*Click **Analysis** to know the team's next move.*

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Scenario Analysis Solution

United Containers decided to implement Action buttons for the following reasons:

1. New buttons can be created to generate opportunity records.

2. Opportunity line items can be added to generated opportunities.

3. Elimination of duplicate data entry and human errors.

*Click **Solution** to know the company's decision.*

Scenario | Analysis | Solution

United Containers took the following steps:

1. A new Create a Record button was created.

2. The new button was added to the Accounts page layout for salespeople.

3. The new button was customized to include line item products.

Proceed forward to view the demo.

- Custom Actions speed up redundant processes.

- Links can be used to open pop-up windows.

- Buttons can be used to create and update records.

This concludes 'Creating Buttons, Links, and Actions.'

The next Lesson is 'Visual Workflow, Process Builder, and Schema Builder.'