Salesforce1 - Actions
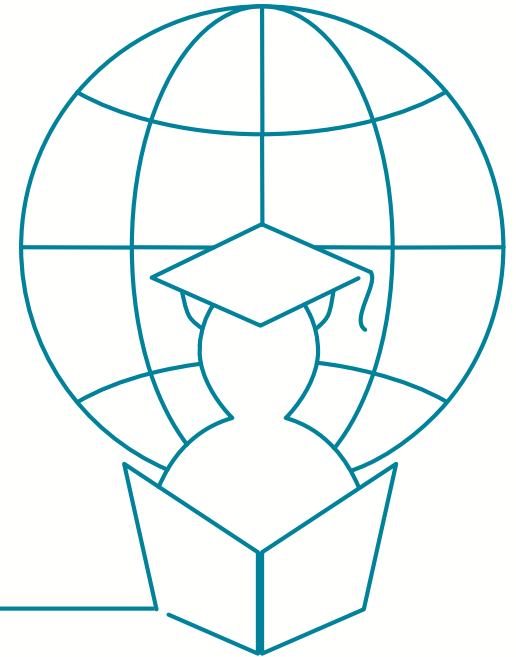
Lesson 25: Introduction to Salesforce 1

Lesson Objectives

- By the end of this lesson, you will be able to:
  - Salesforce 1 Actions
  - Types of Actions
  - Action categories
  - Action Layouts

Salesforce1 Actions

- Actions appear in Salesforce1 in action bar on list items like task lists and related record lists
- This gives your mobile users the ability to work with records directly from lists and update records without having to open them
- To access list item actions, navigate to the task list or open a related list from an object's related information page.

Types of Actions

- Types of Actions:
  - *Create actions* let users create records

  - *Log a call actions* let users record the details of phone calls

  - *Question actions* enable users to ask and search for questions about the records

  - *Send email actions*, available only on cases

  - *Edit actions* let users make changes to a record

Types of Actions

- You can create:
  - Object Specific Actions
    - Object-specific actions create records that are automatically associated with related records
    - Eg. you add an object-specific action on the Account object that creates contacts.
    - If a user creates a contact with that action on the detail page for the Acme account, that new contact is automatically associated with Acme
    - You can only add an object-specific action to page layouts for that object.
  - Global Quick Actions
    - Global actions support any page that supports actions like the Home page, Chatter tab and the object page
    - Global create actions enables users to create object records
    - To record call details from global page, add log a call action to global layouts
    - They can also record call details directly from their phone while in Salesforce1

Actions Categories

- Action Categories:
  - Standard Actions
    - These actions are automatically included when Chatter is enabled – Post, File, Link, Poll
    - Standard Actions
  - Default Actions:
    - These are predefined actions to get you and your users started using actions in your organization
    - Add default actions to publisher layouts to make them available to your users in the full Salesforce site and action bar Eg: Create New Case, View All Accounts
  - Custom actions
    - Custom actions are Visualforce pages or canvas apps with functionality that you define
    - You can create a custom action so that users can write functionality that you define
    - Eg. Create custom action so that users can write comments that are longer than 5000 characters
  - Productivity Actions
    - They are predefined by Salesforce and are attached to a limited set of objects
   - You cannot edit or delete productivity actions

Actions Layouts

- Action Layouts:
  - Salesforce populates its layout with a default set of fields
- Inactive Fields
  - Fields that are already on the action layout still appear on the palette but are inactive
- Field Type Conversion
  - If you convert a field's type from one that is supported for actions to a type that isn't supported, Salesforce removes the field from the action layout.
  - If you convert the field back to a supported type without changing the action layout, Salesforce automatically adds the field back to the layout.

Summary

- Actions appear in Salesforce1
- Types of actions:
  - Global actions
  - Object specific action
- Action Categories: standard, default, custom and productivity

Module Review
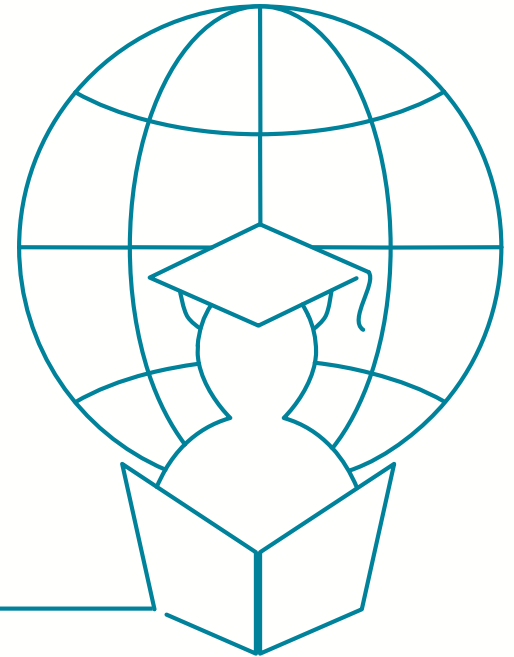
Q1: Which of the following actions are predefined actions?

- Standard
- Default
- Custom
- Productivity

Q2: Which of the following actions will let user make changes to a record?

- Create actions
- Log a call
- Send email
- Update actions