

REPLACING URL HACKS WITH PRE-DEFINED ACTIONS IN LIGHTNING EXPERIENCE

May 28, 2019 sanketthoughts Lightning App Builder [Leave a comment](#)

lightning Readiness check tells you that if you have any buttons based on URL hacks will not be supported in Lightning Experience. For example, If you are using any button of type URL to pre-populate some values from Parent record, They might not work in Lightning.

Let's say, On Account record page, You are having URL button to pre-populate some field values using URL hacks. They will not work in Lightning.

You might be looking for the option that will be supported in Lightning Experience. The quick action will come to rescue you in such situations.

The quick actions are of different type but we will mainly discuss about the object specific quick actions as URL hacks are also object specific.

- Object-specific actions can update records.
- Object-specific actions can create records that are automatically associated with related information. For example, a user could initiate an action that simultaneously creates a contact and associates it with an account.

Steps to create Object-specific action

1. On object manager page of an object, Go to Buttons, Links, and Actions and click **New Action**.
2. Verify that the action type is **Create a Record**. (Note: Actions can do more than just create records.)
3. In the Target Object dropdown list, select **the object name to create record with pre-populated values**.
4. Enter **your desired name** in the Label field.

SETUP > OBJECT MANAGER
Account

Details
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Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
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Search Layouts
Hierarchy Columns

Account Actions
New Action

Enter Action Information

Object Name: Account

Action Type: Create a Record

Target Object: Opportunity

Standard Label Type: --None--

Label: New Opportunities

Name: New_Opportunities

Description:

Create Feed Item: ☒

Success Message:

Icon: [Change Icon](#)

5. Click **Save**.
6. In the layout editor, Add your minimal required fields to create a record

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Action: New Opportunities

Save | Quick Save | Preview As... | Cancel | Undo | Redo

Opportunity Fields

Field Name	Field Name	Field Name	Field Name	Field Name	Field Name
Blank Space	Contract	Forecast Category	Opportunity Name	Primary Campaign	Stage
Account Name	Current Generator(s)	Lead Source	Opportunity Owner	Private	Tracking Number
Amount	Delivery/Installa...	Main Competitor(s)	Order Number	Probability (%)	Type
Close Date	Description	Next Step	Price Book	Quantity	

Opportunity Name *
Sample Text

Close Date *
5/28/2018

Amount
\$123.45

Opportunity Owner
Sample Text

Description
Sample Text

Account Name
Sample Text

Stage *
Sample Text

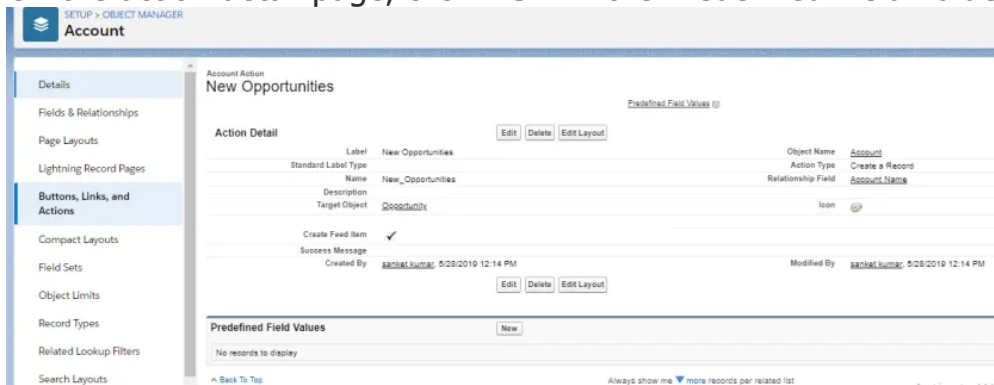
Next Step
Sample Text

7. Click **Save**

Here, we have created one action on **Account** to create a record of Object **Opportunity** associated with account with auto population of Account description on Opportunity description. In order to pre-populate, We need to set pre-defined values to account and description fields dynamically.

Steps to Set Predefined Field Values for Quick Action Fields

1. Click the name of an action in the Buttons, Links, and Actions list or the Global Actions list.
2. On the action detail page, click **New** in the Predefined Field Values list.



New Predefined Field Value for New Opportunities

Predefined Field Value Edit [Save] [Cancel]

Field Information

Target Object: Opportunity
Field Name: Description
Field Type: Long Text Area

Specify New Field Value

Formula Value:

Functions
-- All Function Categories --
ABS
ADDMONTHS
AND
BEGINS
BLANKVALUE
BR

Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7)

3. Select the field you want to predefine a value for.

4. Specify the value for the field. For single-select picklists, you can specify both a specific value and a formula value. If you set both, the New Predefined Field Value for New Opportunities

The screenshot shows the 'Predefined Field Value Edit' window. Under 'Field Information', 'Target Object' is 'Opportunity', 'Field Name' is 'Description', and 'Field Type' is 'Long Text Area'. The 'Specify New Field Value' section has 'Formula Value' selected. The formula editor shows 'Formula Value (Text) =' followed by 'Account.Description'. A 'Functions' sidebar on the right lists various functions like ABS, ADDMONTHS, AND, BEGINS, BLANKVALUE, and BR. At the bottom, there is a 'Check Syntax' button and a note about formula syntax.

formula value takes precedence over the specific value.

5. Click **Save**.


Here, We have set the pre-defined value for description field of Opportunity by referencing the account description fields. I have added screenshots for description, but you need to set the pre-defined value for Account Name field of Opportunity to associate it with an Account.

New Opportunities

[Predefined Field Values \(2\)](#)

Action Detail

[Edit](#)
[Delete](#)
[Edit Layout](#)

Label	New Opportunities	Object Name	Account
Standard Label Type		Action Type	Create a Record
Name	New_Opportunities	Relationship Field	Account Name
Description			
Target Object	Opportunity	Icon	
Create Feed Item	<input checked="" type="checkbox"/>		
Success Message			
Created By	sanket kumar , 5/28/2019 12:14 PM	Modified By	sanket kumar , 5/28/2019 12:14 PM

[Edit](#)
[Delete](#)
[Edit Layout](#)

Predefined Field Values

[New](#)

Action	Field Name	API Name	Field Type	Value
Edit Del	Account Name	AccountId	Lookup	Account.Id
Edit Del	Description	Description	Long Text Area	Account.Description

Its time to add the action on the related list of Account. Go to Object Manager of Account object and select Page layout and edit the page the layout assigned to you. Add the newly created action to **Salesforce Mobile and Lightning Experience Actions** section and save your layout.

The screenshot displays the Salesforce Page Layout editor interface. On the left, a navigation pane lists various configuration options, with 'Page Layouts' selected and 'Mobile & Lightning Actions' highlighted. The main workspace is divided into two sections: 'Quick Actions in the Salesforce Classic Publisher' and 'Salesforce Mobile and Lightning Experience Actions'. In the top section, a 'New Opportunities' button is visible. In the bottom section, a 'New Opportunities' button is also present and highlighted with a black box. A black arrow points from this highlighted button in the bottom section to the 'New Opportunities' button in the top section. The top of the editor shows a toolbar with options like 'Save', 'Quick Save', 'Preview As...', 'Cancel', 'Undo', 'Redo', and 'Layout Properties'. A 'Quick Find' search bar is also present, containing the text 'new'.

Details

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Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find new

Fields Buttons Custom Links Quick Actions Mobile & Lightning Actions Expanded Lookups Related Lists

Check for New Data New Contact New Note New Tasks

New Account New Event New Opportunities

New Account Summe... New Group New Opportunity

New Case New Lead New Task

Quick Actions in the Salesforce Classic Publisher

Post File New Task New Contact New Case Log a Call New Oppor

Email

Salesforce Mobile and Lightning Experience Actions

New Opportunities New Account Summer 19 Post File New Task New Case

Link Poll Question Change Owner View Account Hierarchy Printable View

View Partner Scorecard Get Survey Invitation Edit Add to Campaign Change Record T

Sharing Call Send Text Email (mobile only) View Website New Contact

Everything is set now. You can check your Action now. Navigate to an account record and you will see your button on the Highlight panel.

The image shows the Salesforce interface for an Account named "Edge Communications". The "Accounts" tab is selected in the top navigation bar. In the account details section, the "New Opportunities" button is highlighted with a red rectangle. Below this, a table lists account details:

Type	Phone	Website	Account Owner	Account Site	Industry
Customer - Direct	(512) 757-6000	http://edgecomm.com	sanket kumar		Electronics

Below the table, there are tabs for "Related", "Details", and "Custom List". The "Details" tab is active, showing a list of account details:

Field	Value
Account Owner	sanket kumar
Account Name	Edge Communications
Parent Account	
Account Number	CD451796
Rating	Hot
Fax	(512) 757-9000
Ticker Symbol	EDGE
Ownership	Public

When you click on that button, A Popup will appear with description and Account field of Opportunity auto-populated from the current Account record as below.

The image shows the "New Opportunities" popup form in Salesforce. The form is titled "New Opportunities" and contains the following fields:

- * Opportunity Name:
- * Close Date:
- Amount:
- Opportunity Owner: sanket kumar
- Description: (Pre-filled with: "Edge, founded in 1998, is a start-up based in Austin, TX. The company designs and manufactures a device to")
- Account Name: (Pre-filled with: "Edge Communications")
- * Stage: (Pre-filled with: "--None--")
- Next Step:

At the bottom of the form, there are "Cancel" and "Save" buttons.

This way, you get an alternative to eliminate your URL hacks used in Classic.

