

# **Step-by-Step Guide**

## **On *Actions* in Lightning Experience**

# Steps Overview



# Ingredients

You will need the following to follow this guide

- Salesforce Developer Org or Sandbox

DO NOT use your Production  
Salesforce Org for trying out  
these steps. ALWAYS test in a  
Developer Org or Sandbox first

# Using This Guide

A couple of standards/conventions have been followed in this guide. Here is what they mean

1. Text with White background, red border and a number. In a callout format

Actions that you need to follow to configure. Carry out these steps **in the order of its sequence number**.

Text with Yellow Background

General explanation/information to support actions mentioned on the slide. Will assist you in understanding what is being done and why

Text with Red Background

Important information. Take a closer look and follow as advised. You may not be able to complete the exercise successfully if you miss these instructions

Text with Green Background

Appears on the bottom bar of the page on left hand side. Provides information on the Hardware and Software currently being used (if applicable)

# Related Blog

If you haven't already, please navigate to the following blog post URL **before** starting with this guide. The post contains useful information and links to relevant resources including the option to **download** the PDF copy of the presentation

<https://www.asagarwal.com/step-by-step-guide-on-actions-in-lightning-experience>

# Use Cases (Real Life Scenarios)

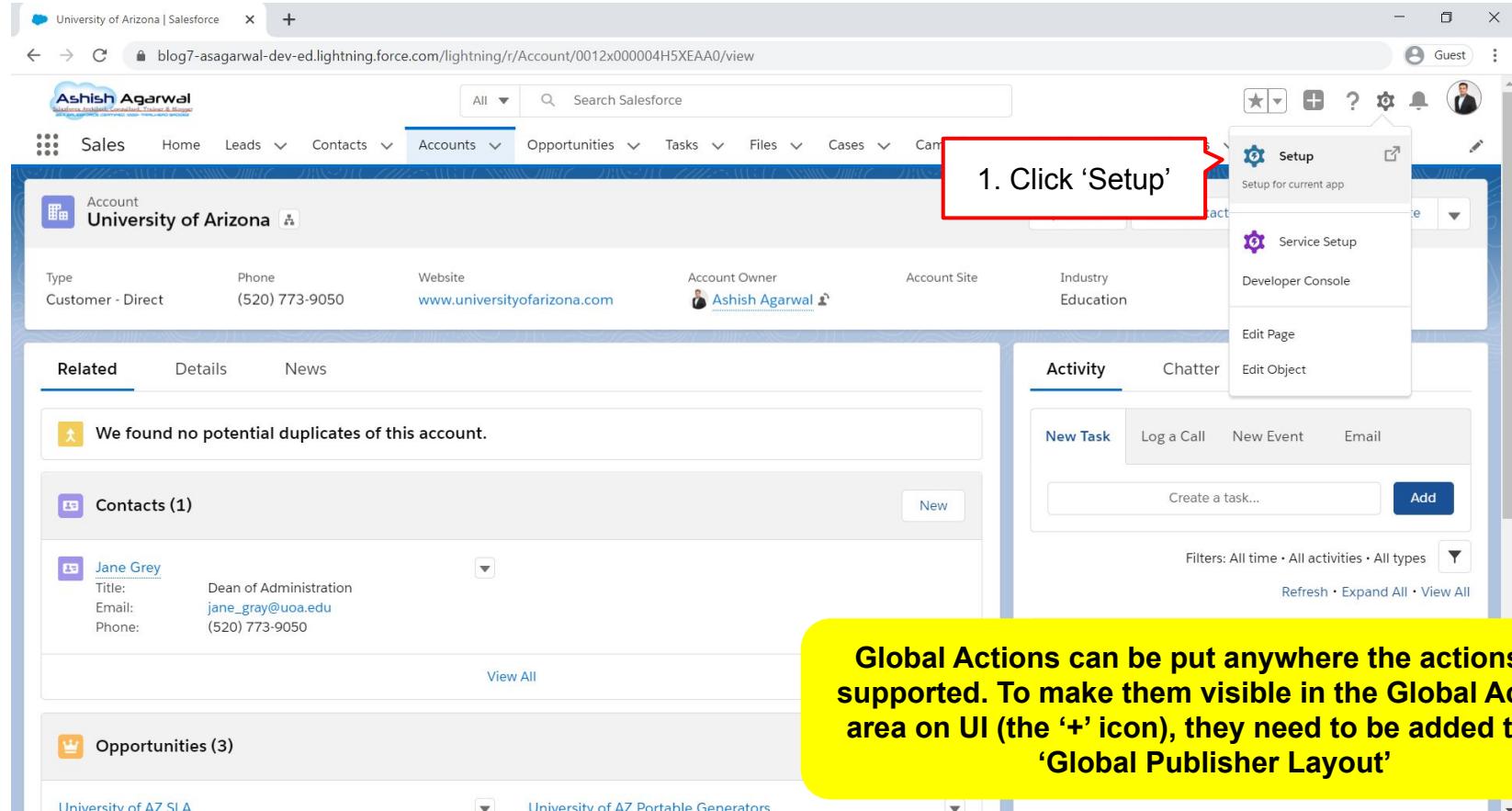
## Where will you use this?

- Understand where an Action will appear in the UI
- Control the visibility and display order of Actions on a record page
- Define a custom action as per your business requirements
- Call a Flow, Visualforce Page or Lightning Component from an Action

# Steps Overview



# Create Global Action



University of Arizona | Salesforce

blog7-asagarwal-dev-ed.lightning.force.com/lightning/r/Account/0012x000004H5XEAA0/view

Guest

Search Salesforce

All

Sales Home Leads Contacts Accounts Opportunities Tasks Files Cases Campaigns

Account University of Arizona

Type Customer - Direct Phone (520) 773-9050 Website [www.universityofarizona.com](http://www.universityofarizona.com) Account Owner  Ashish Agarwal Account Site Industry Education

Related Details News

We found no potential duplicates of this account.

Contacts (1)

 Jane Grey Title: Dean of Administration Email: [jane\\_gray@uoa.edu](mailto:jane_gray@uoa.edu) Phone: (520) 773-9050

View All

Opportunities (3)

University of AZ SLA University of AZ Portable Generators

1. Click 'Setup'

Setup

Service Setup

Developer Console

Edit Page

Edit Object

New Task Log a Call New Event Email

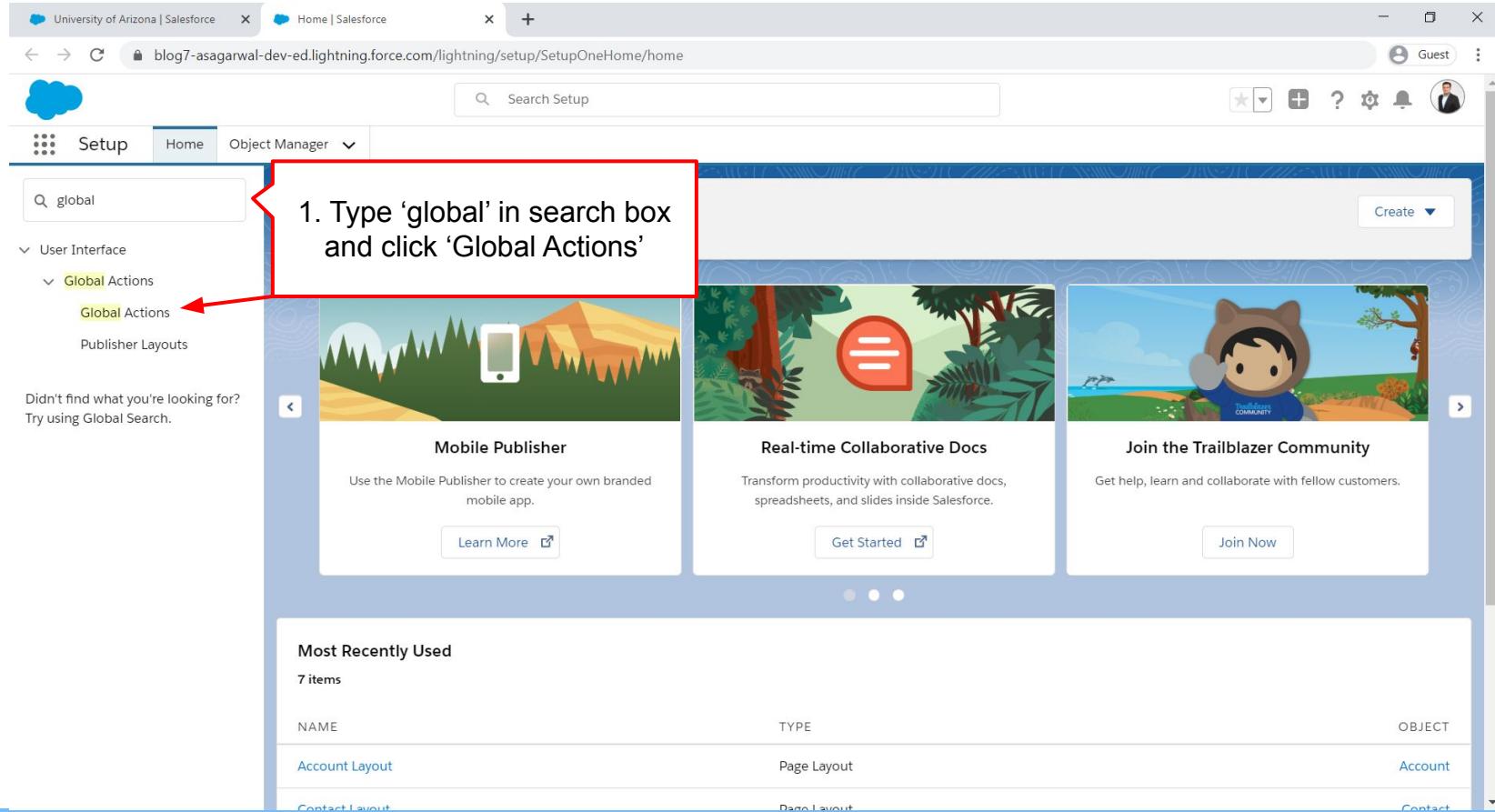
Create a task... Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Global Actions can be put anywhere the actions are supported. To make them visible in the Global Actions area on UI (the '+' icon), they need to be added to the 'Global Publisher Layout'

# Create Global Action



1. Type 'global' in search box and click 'Global Actions'

University of Arizona | Salesforce Home | Salesforce blog7-asagarwal-dev-ed.lightning.force.com/lightning/setup/SetupOneHome/home

Setup Home Object Manager

Search Setup

global

User Interface

Global Actions

Global Actions

Publisher Layouts

Didn't find what you're looking for?  
Try using Global Search.

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Join the Trailblazer Community

Join Now

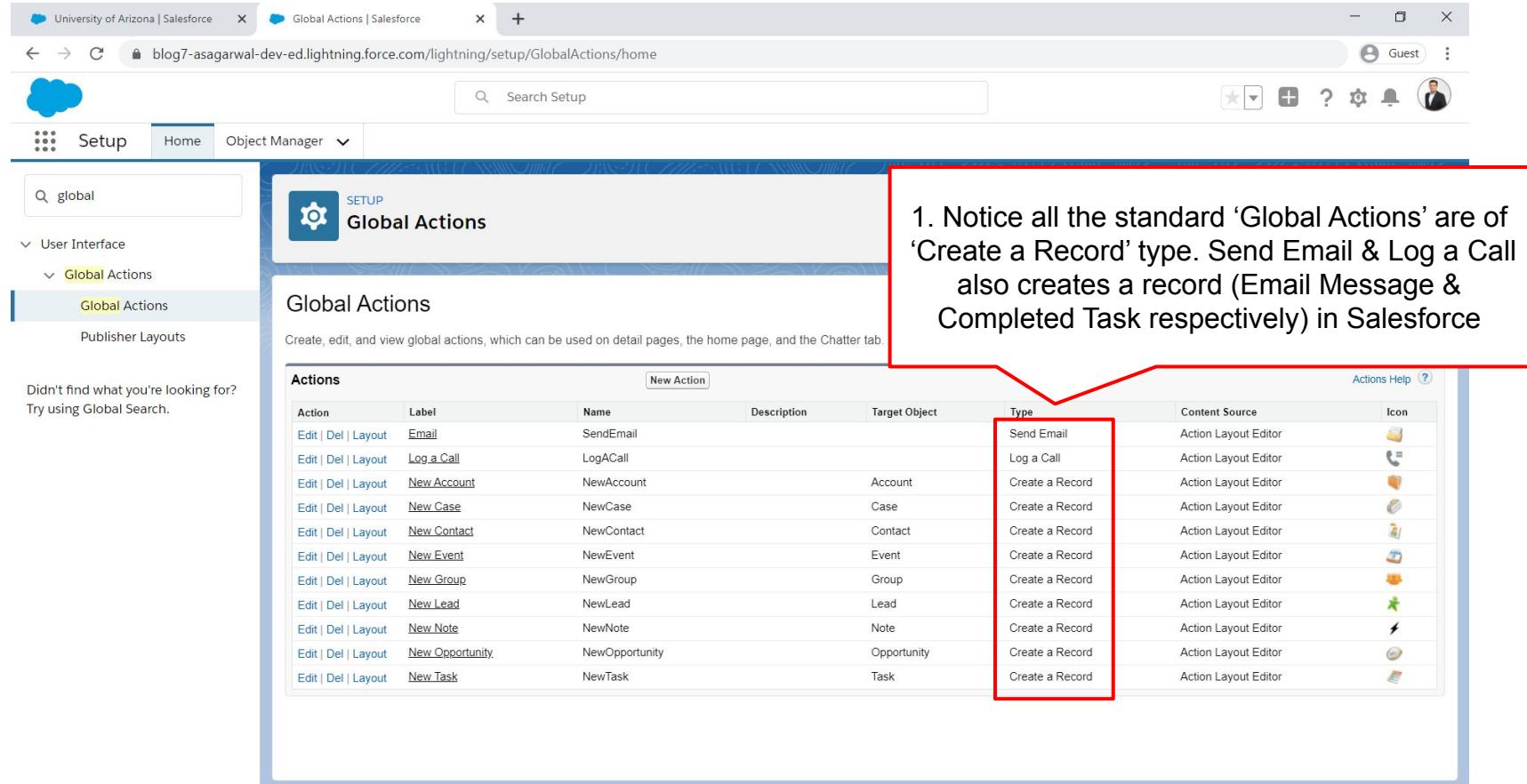
Most Recently Used

7 items

NAME	TYPE	OBJECT
Account Layout	Page Layout	Account
Contact Layout	Page Layout	Contact

Visit asagarwal.com for useful tips and tricks on Salesforce

# Create Global Action



The screenshot shows the Salesforce Global Actions setup page. The left sidebar is titled 'Setup' and includes 'Home', 'Object Manager', and a search bar for 'global'. Under 'User Interface', 'Global Actions' is selected, and 'Global Actions' is highlighted in the list. The main content area is titled 'Global Actions' and contains a table of standard global actions. A red box highlights the 'Type' column, which shows that all actions are of type 'Create a Record'. A callout points to the first few rows: 'Send Email', 'Log a Call', and 'New Account'. A text box with a red border contains the following note:

1. Notice all the standard 'Global Actions' are of 'Create a Record' type. Send Email & Log a Call also creates a record (Email Message & Completed Task respectively) in Salesforce

Action	Label	Name	Description	Target Object	Type	Content Source	Icon
Edit   Del   Layout	Email	SendEmail			Send Email	Action Layout Editor	
Edit   Del   Layout	Log a Call	LogCall			Log a Call	Action Layout Editor	
Edit   Del   Layout	New Account	NewAccount		Account	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Case	NewCase		Case	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Contact	NewContact		Contact	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Event	NewEvent		Event	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Group	NewGroup		Group	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Lead	NewLead		Lead	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Note	NewNote		Note	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Opportunity	NewOpportunity		Opportunity	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Task	NewTask		Task	Create a Record	Action Layout Editor	

# Create Global Action

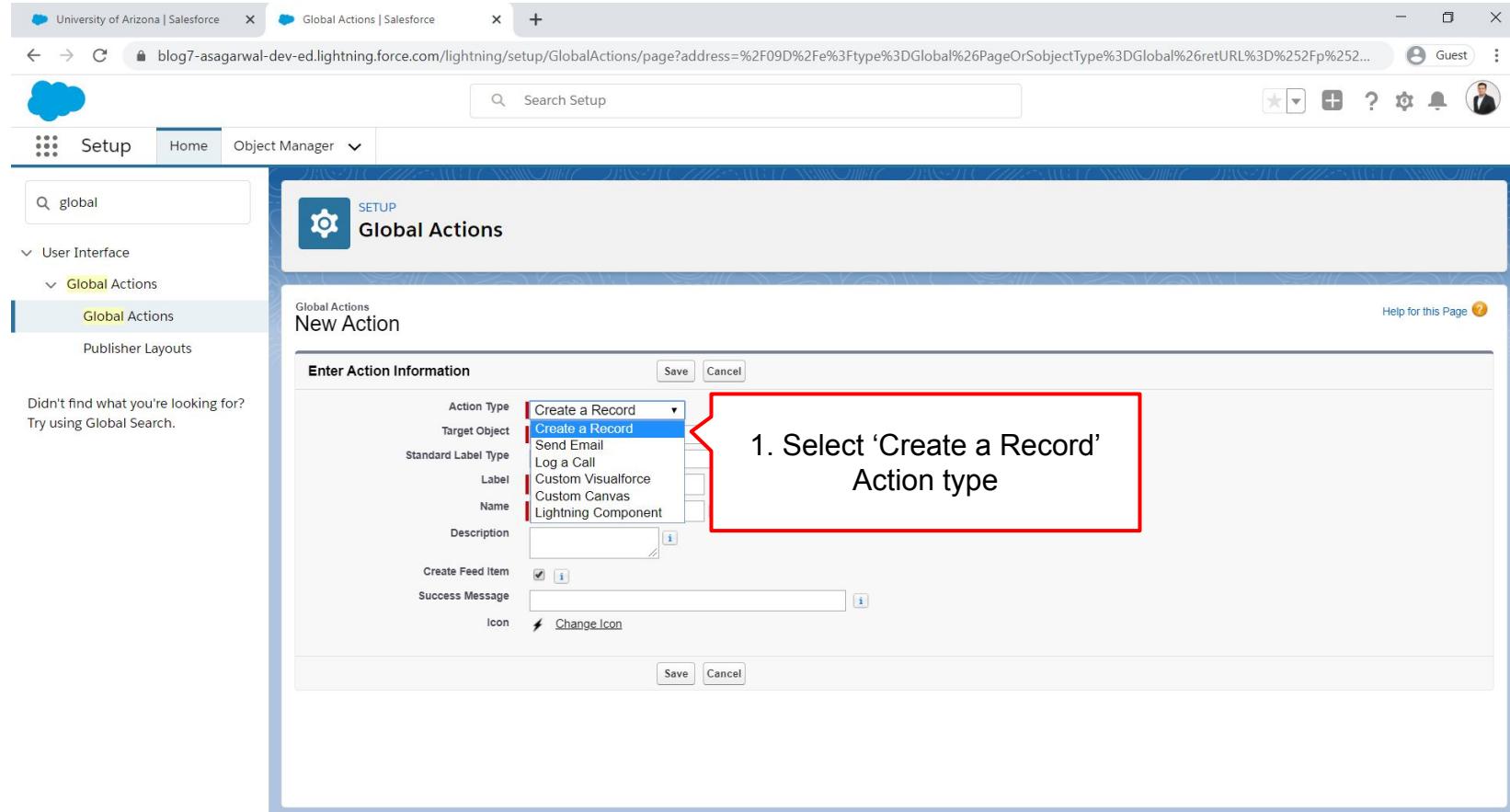
The screenshot shows the Salesforce Global Actions setup page. The left sidebar includes links for Setup Home, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, and Lightning Usage. The main content area is titled 'Global Actions' and contains a table of existing global actions. A red box highlights the 'New Action' button in the table header. Another red box highlights the 'Global Actions' section in the top right corner of the page. The right sidebar lists various global actions with their icons and names: New Event, New Task, New Contact, Log a Call, New Opportunity, New Case, New Lead, and Email. Each action is accompanied by an 'Edit | Del | Layout' link and an 'Icon' link.

1. Once created and added to Global Publisher Layout, it will be visible here

2. Click 'New Action'

Action	Label	Name	Description	Target Object	Type	Action Layout Editor	Icon
Edit   Del   Layout	Email	SendEmail			Send Email	Action Layout Editor	
Edit   Del   Layout	Log a Call	LogACall			Log a Call	Action Layout Editor	
Edit   Del   Layout	New Account	NewAccount		Account	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Case	NewCase		Case	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Contact	NewContact		Contact	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Event	NewEvent		Event	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Group	NewGroup		Group	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Lead	NewLead		Lead	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Note	NewNote		Note	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Opportunity	NewOpportunity		Opportunity	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Order	New_Order	Create a new Order	Order	Create a Record	Action Layout Editor	
Edit   Del   Layout	New Task	NewTask		Task	Create a Record	Action Layout Editor	

# Create Global Action



University of Arizona | Salesforce Global Actions | Salesforce

blog7-asagarwal-dev-ed.lightning.force.com/lightning/setup/GlobalActions/page?address=%2F09D%2Fe%3Ftype%3DGlobal%26PageOrSObjectType%3DGlobal%26retURL%3D%252Fp%2523...

Guest

Setup Home Object Manager

Search Setup

global

User Interface

Global Actions

Global Actions

Publisher Layouts

Didn't find what you're looking for?  
Try using Global Search.

SETUP Global Actions

Global Actions New Action Help for this Page

Enter Action Information

Action Type: Create a Record

Target Object:

Standard Label Type:

Label:

Name:

Description:

Create Feed Item:

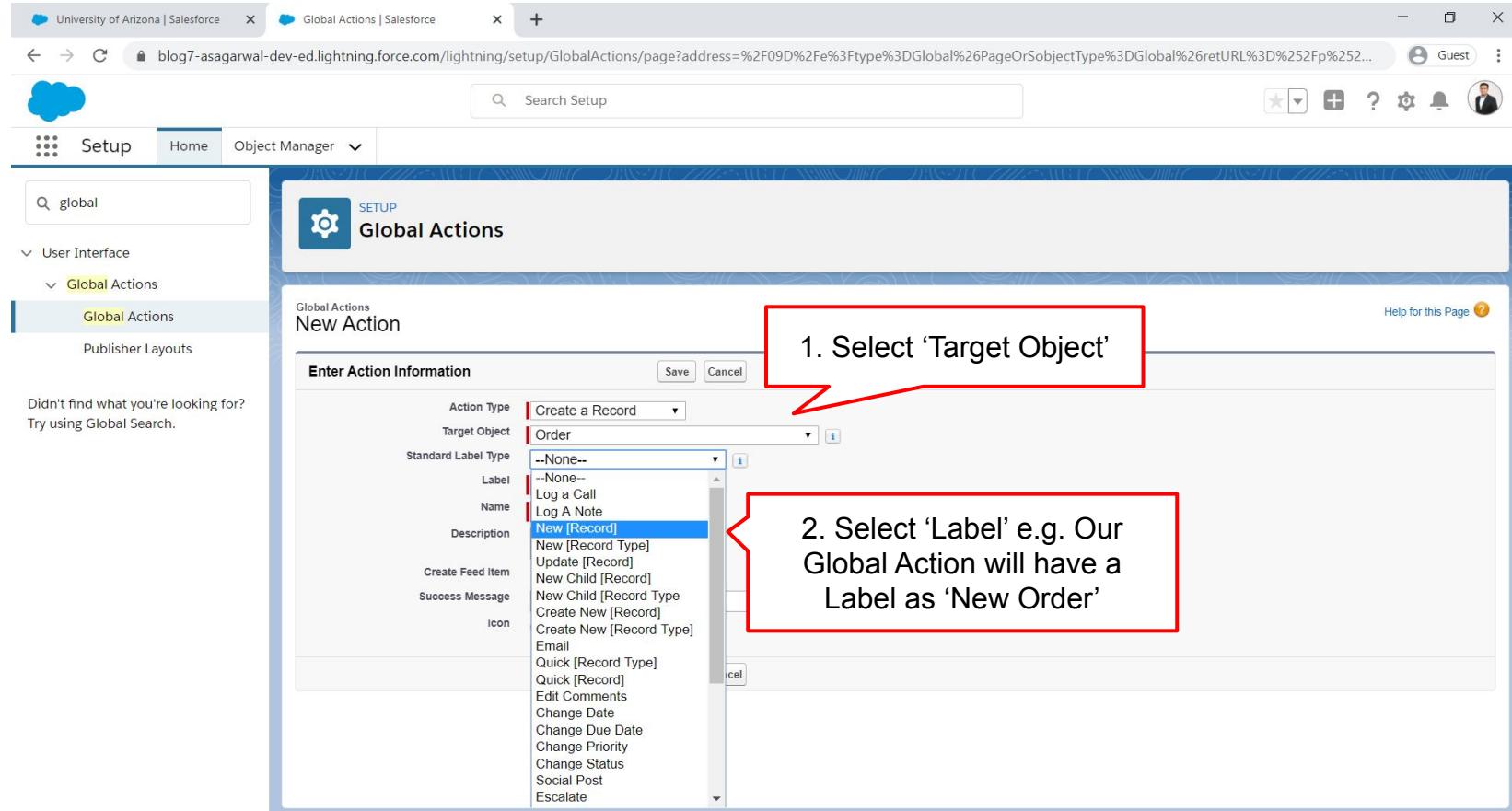
Success Message:

Icon:

1. Select 'Create a Record' Action type

Save Cancel

# Create Global Action



University of Arizona | Salesforce Global Actions | Salesforce

blog7-asagarwal-dev-ed.lightning.force.com/lightning/setup/GlobalActions/page?address=%2F09D%2Fe%3Ftype%3DGlobal%26PageOrSObjectType%3DGlobal%26retURL%3D%252Fp%252...

Guest

Setup Home Object Manager

Search Setup

global

User Interface

Global Actions

Global Actions

Publisher Layouts

Didn't find what you're looking for?  
Try using Global Search.

SETUP Global Actions

Global Actions New Action Help for this Page

Enter Action Information

Action Type: Create a Record

Target Object: Order

Standard Label Type: --None--

Label: New [Record]

Name: New [Record]

Description: New [Record Type]

Create Feed Item

Success Message

Icon:

1. Select 'Target Object'

2. Select 'Label' e.g. Our Global Action will have a Label as 'New Order'

# Create Global Action

1. Enter 'Name' with \_ in between the words as its an API Name

2. Enter short 'Description'

3. Optionally select an 'Icon'

4. Click 'Save'

Global Actions | Salesforce

Search Setup

Setup Home Object Manager

global

SETUP Global Actions

Global Actions New Action Help for this Page

Action Type: Create a Record

Target Object: Order

Label Type: New [Record]

Name: New\_Order

Description: Create a new Order

Icon: Change Icon

Save Cancel

# Create Global Action

The screenshot shows the Salesforce Object Manager interface for creating a Global Action page layout. The top navigation bar includes tabs for 'University of Arizona | Salesforce' and 'Object Manager | Salesforce'. The URL in the address bar is <https://blog7-asagarwal-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2Flayouteditor%2FquickActionLayoutEditor.apexp%3Faid%3D09D2x000001WRYt%26retURL%3D%2FObjectManager%2Fpage%2Fnew%2Forder%2F>. The page title is 'New Order'.

**1. Add or remove fields from the page layout. This is the layout that will be displayed when users click on Global Action**

A red box highlights the 'Order Fields' section, which contains a table of fields: Blank Space, Company Authorize..., Customer Authoriz..., Order Name, Order Type, Ship To Contact; Account Name, Company Authorize..., Description, Order Owner, PO Date, Status; Billing Address, Contract Number, Opportunity, Order Reference N..., PO Number; Bill To Contact, Customer Authoriz..., Order End Date, Order Start Date, Shipping Address.

**2. Click 'Save' once done**

A red arrow points from the 'Save' button in the top left of the 'New Order' window to the 'Save' button in the top left of the 'Object Manager' window.

# Steps Overview



# Publish Global Action - Global Publisher Layout

The screenshot shows the Salesforce Setup interface with the following annotations:

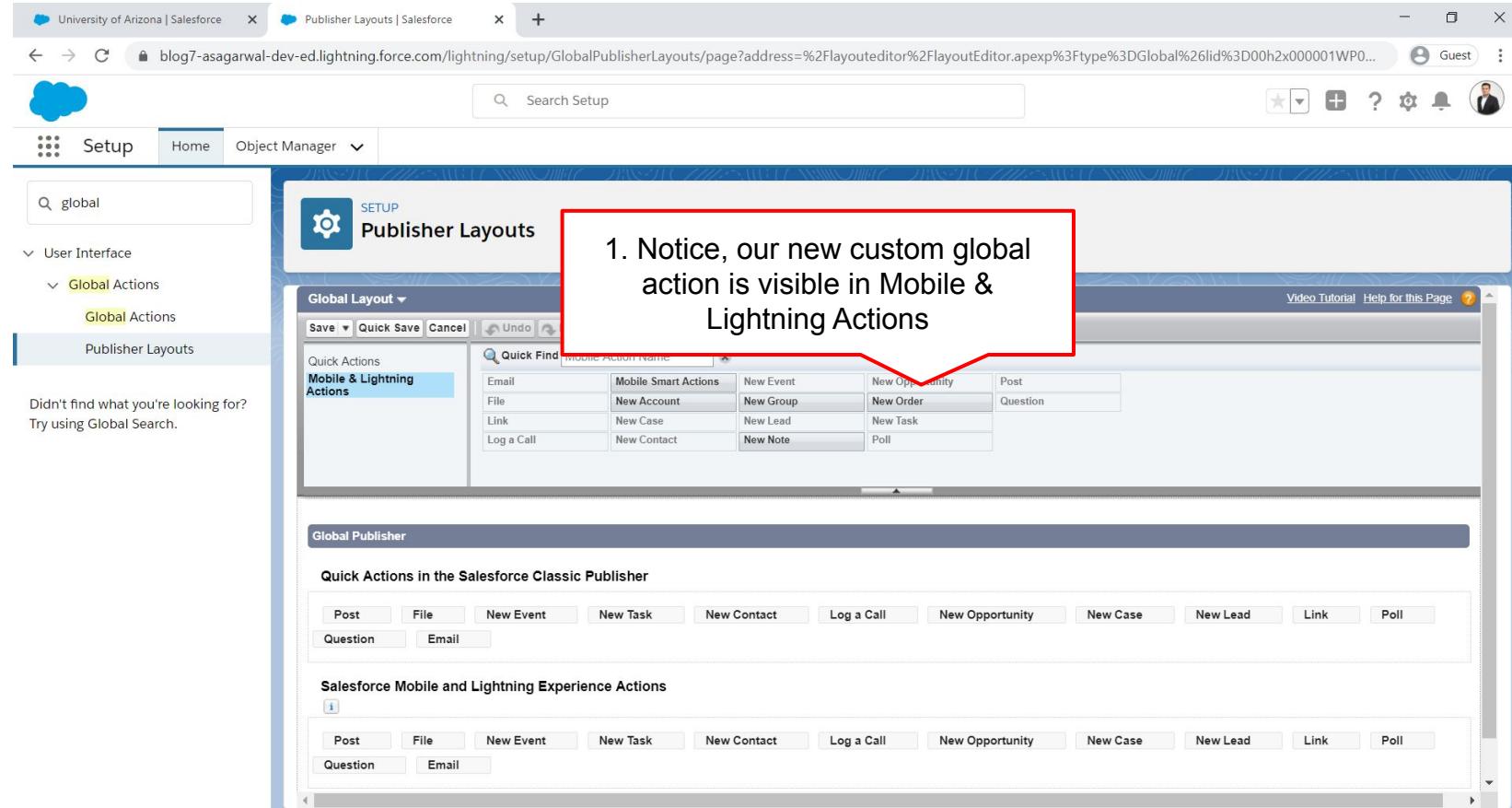
1. Type 'global' in search box and click 'Publisher Layouts' - A red box highlights the search bar containing 'global' and the 'Publisher Layouts' link in the Global Actions menu.
2. Click Edit - A red box highlights the 'Edit | Del' link in the Global Publisher Layouts table.

**Global Publisher Layout**

This page allows you to create layouts of actions on Chatter publishers for global pages such as Home, Chatter Home, and User Profile. After creating global publisher layouts, you can assign them to different user profiles. Click the Publisher Layout Assignment button to control which actions users see by default in the publisher on global pages.

Action	Publisher Layout Name	Created By	Modified By
Edit   Del	Global Layout	Ashish Agarwal, 4/20/2020, 9:29 PM	Ashish Agarwal, 4/20/2020, 9:29 PM

# Publish Global Action - Global Publisher Layout



1. Notice, our new custom global action is visible in Mobile & Lightning Actions

Global Layout

Quick Actions	Mobile & Lightning Actions	New Event	New Opportunity	Post
Email	Mobile Smart Actions	New Event	New Opportunity	Post
File	New Account	New Group	New Order	Question
Link	New Case	New Lead	New Task	
Log a Call	New Contact	New Note	Poll	

Global Publisher

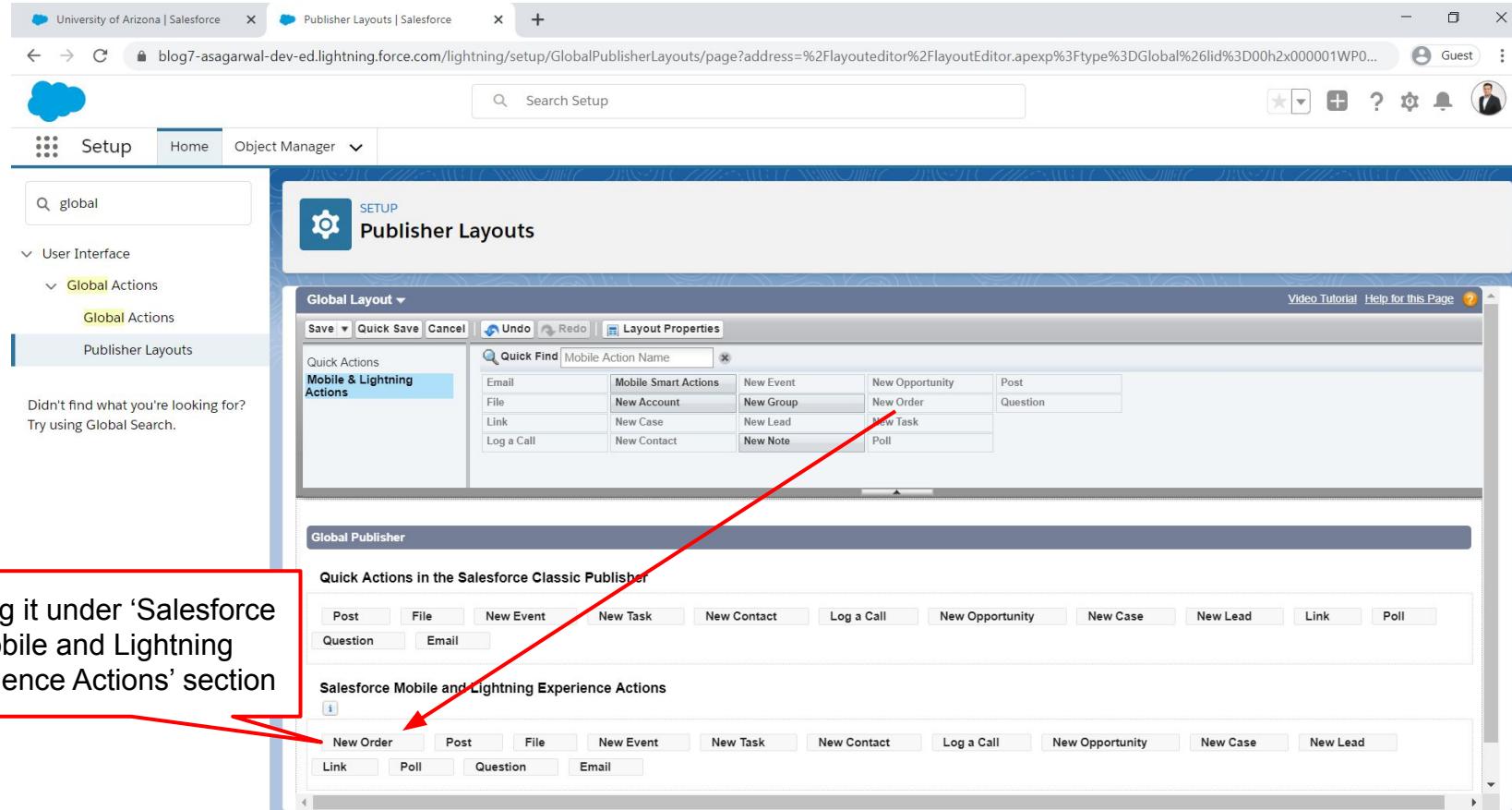
Quick Actions in the Salesforce Classic Publisher

Post	File	New Event	New Task	New Contact	Log a Call	New Opportunity	New Case	New Lead	Link	Poll
Question	Email									

Salesforce Mobile and Lightning Experience Actions

Post	File	New Event	New Task	New Contact	Log a Call	New Opportunity	New Case	New Lead	Link	Poll
Question	Email									

# Publish Global Action - Global Publisher Layout



University of Arizona | Salesforce    Publisher Layouts | Salesforce

blog7-asagarwal-dev-ed.lightning.force.com/lightning/setup/GlobalPublisherLayouts/page?address=%2Flayouteditor%2FlayoutEditor.apexp%3Ftype%3DGlobal%26id%3D00h2x000001WP0...

Guest

Search Setup

Setup    Home    Object Manager

global

User Interface

Global Actions

Global Actions

Publisher Layouts

Didn't find what you're looking for?  
Try using Global Search.

SETUP Publisher Layouts

Global Layout ▾

Save   Quick Save   Cancel   Undo   Redo   Layout Properties

Mobile & Lightning Actions

Quick Actions	Mobile Smart Actions	New Event	New Opportunity	Post
Email	New Account	New Group	New Order	Question
File	New Case	New Lead	New Task	
Link	New Contact	New Note	Poll	
Log a Call				

Video Tutorial   Help for this Page

Global Publisher

Quick Actions in the Salesforce Classic Publisher

Post   File   New Event   New Task   New Contact   Log a Call   New Opportunity   New Case   New Lead   Link   Poll

Question   Email

Salesforce Mobile and Lightning Experience Actions

New Order   Post   File   New Event   New Task   New Contact   Log a Call   New Opportunity   New Case   New Lead

Link   Poll   Question   Email

1. Drag it under 'Salesforce Mobile and Lightning Experience Actions' section

# Publish Global Action - Global Publisher Layout

The screenshot shows a Salesforce Global Publisher Layout for an Account record. The main content area displays the Account details for 'University of Arizona' (Type: Customer - Direct, Phone: (520) 773-9050, Website: www.universityofarizona.com) and a related Contact named 'Jane Grey' (Title: Dean of Administration, Email: jane\_gray@uoa.edu, Phone: (520) 773-9050). The 'Activity' sidebar is open, showing a list of global actions. A red box highlights the first item: '1. 'New Order' now appears under the '+' icon. Click on 'New Order''. The global actions listed are: New Order, New Event, New Task, New Contact, Log a Call, New Opportunity, New Case, New Lead, and Email. Below the sidebar, sections for 'Upcoming & Overdue' and 'Past Activity' are visible.

1. 'New Order' now appears under the '+' icon. Click on 'New Order'

GLOBAL ACTIONS

- New Order
- New Event
- New Task
- New Contact
- Log a Call
- New Opportunity
- New Case
- New Lead
- Email

Activity

New Task Log a Call Email

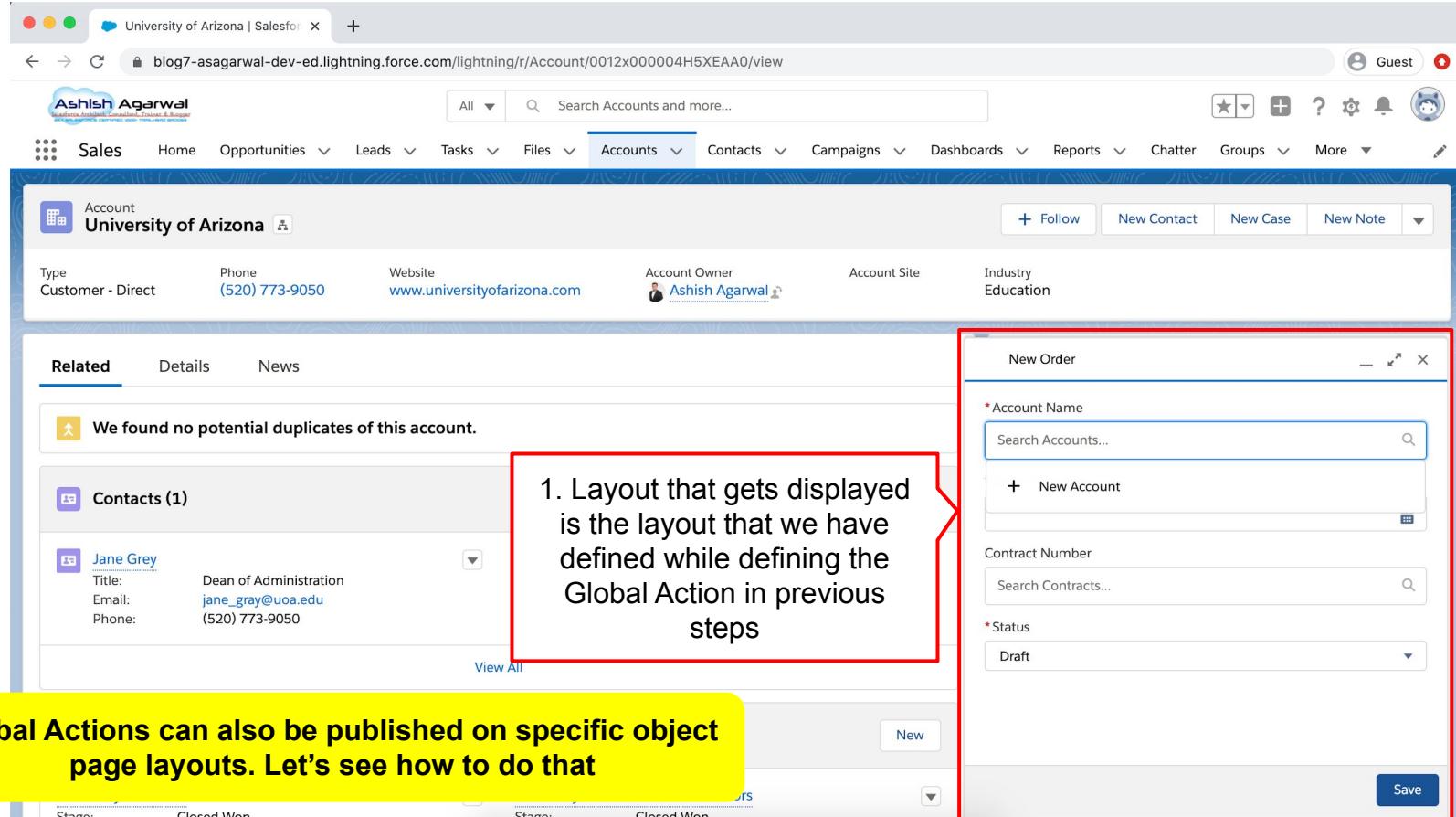
Filters: All time • All activities • All types

Upcoming & Overdue

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

# Publish Global Action - Global Publisher Layout



University of Arizona | Salesforce

blog7-asagarwal-dev-ed.lightning.force.com/lightning/r/Account/0012x000004H5XEAA0/view

Guest

Ashish Agarwal

Search Accounts and more...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Account of University of Arizona

Type Customer - Direct Phone (520) 773-9050 Website [www.universityofarizona.com](http://www.universityofarizona.com) Account Owner Ashish Agarwal Account Site Industry Education

+ Follow New Contact New Case New Note

Related Details News

We found no potential duplicates of this account.

Contacts (1)

Jane Grey  
Title: Dean of Administration  
Email: [jane\\_gray@uoa.edu](mailto:jane_gray@uoa.edu)  
Phone: (520) 773-9050

View All

New Order

\* Account Name  
Search Accounts...

+ New Account

Contract Number  
Search Contracts...

\* Status  
Draft

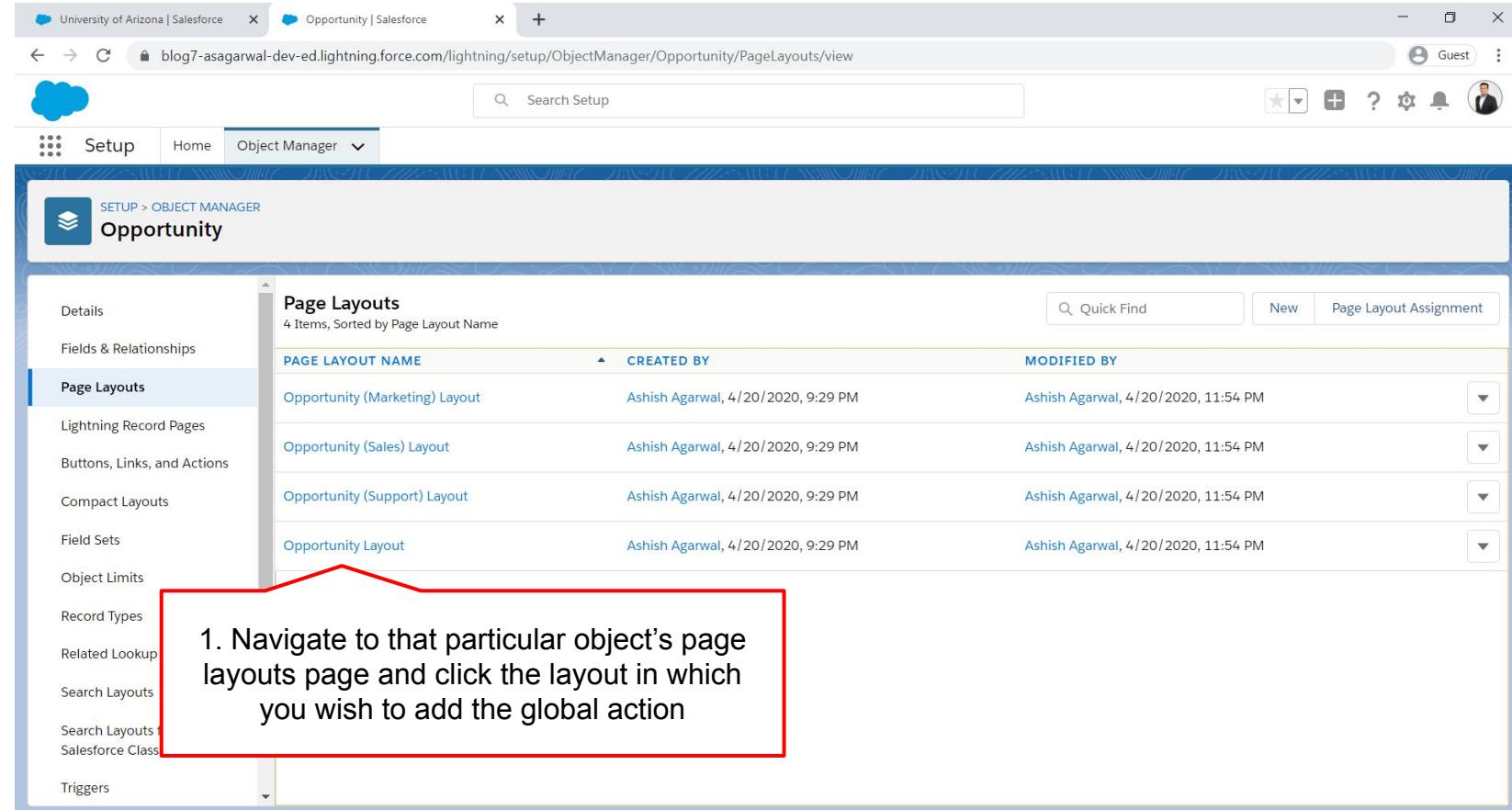
Save

1. Layout that gets displayed is the layout that we have defined while defining the Global Action in previous steps

Global Actions can also be published on specific object page layouts. Let's see how to do that

Stage: Closed Won Stage: Closed Won

# Publish Global Action - Object Page Layout



University of Arizona | Salesforce   Opportunity | Salesforce

blog7-asagarwal-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Opportunity/PageLayouts/view

Guest

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Opportunity

Details

Fields & Relationships

**Page Layouts**

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup

Search Layouts

Search Layouts 1

Salesforce Class

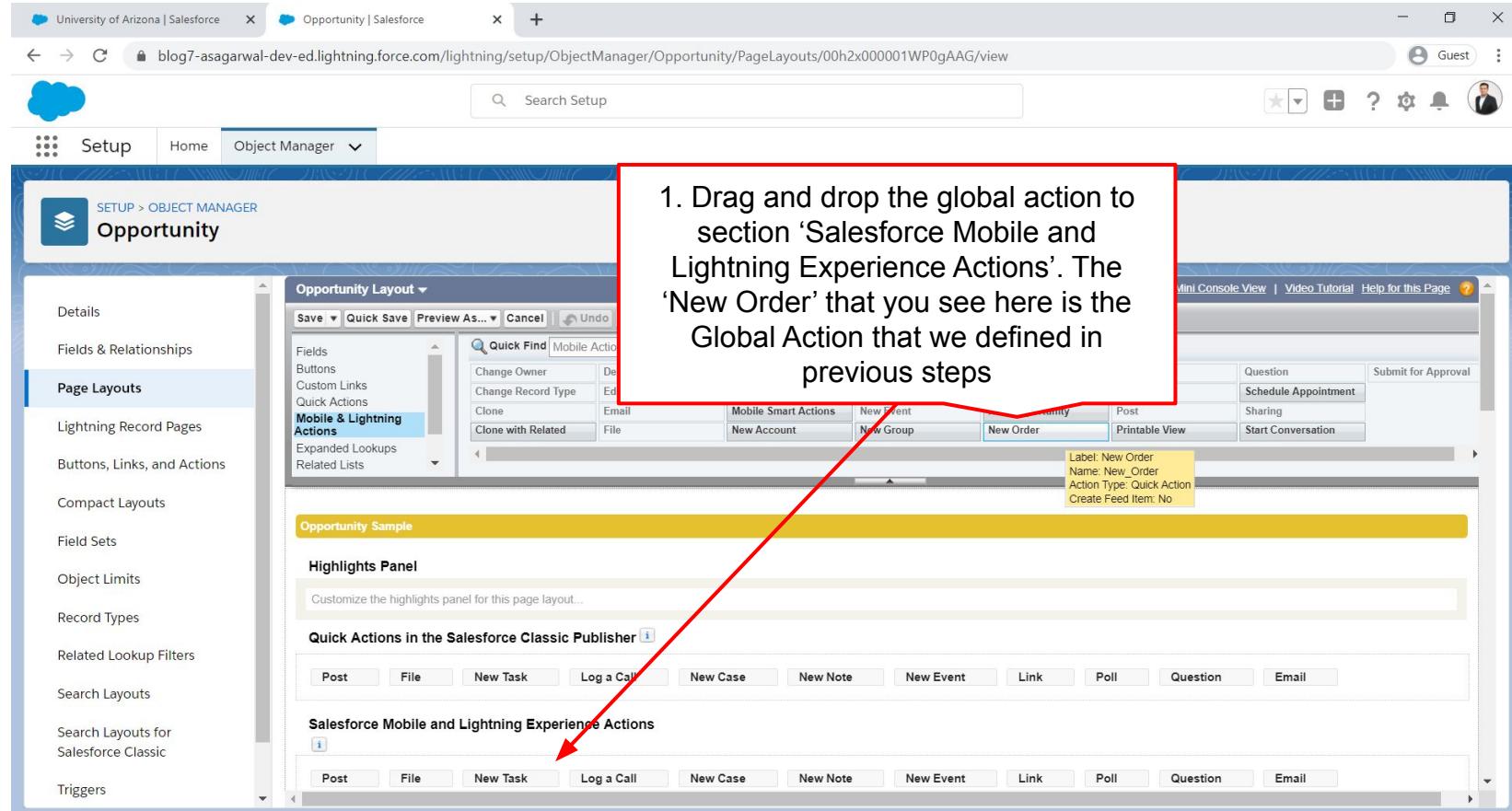
Triggers

**Page Layouts**  
4 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Opportunity (Marketing) Layout	Ashish Agarwal, 4/20/2020, 9:29 PM	Ashish Agarwal, 4/20/2020, 11:54 PM
Opportunity (Sales) Layout	Ashish Agarwal, 4/20/2020, 9:29 PM	Ashish Agarwal, 4/20/2020, 11:54 PM
Opportunity (Support) Layout	Ashish Agarwal, 4/20/2020, 9:29 PM	Ashish Agarwal, 4/20/2020, 11:54 PM
Opportunity Layout	Ashish Agarwal, 4/20/2020, 9:29 PM	Ashish Agarwal, 4/20/2020, 11:54 PM

1. Navigate to that particular object's page layouts page and click the layout in which you wish to add the global action

# Publish Global Action - Object Page Layout



The screenshot shows the Salesforce Setup interface with the following details:

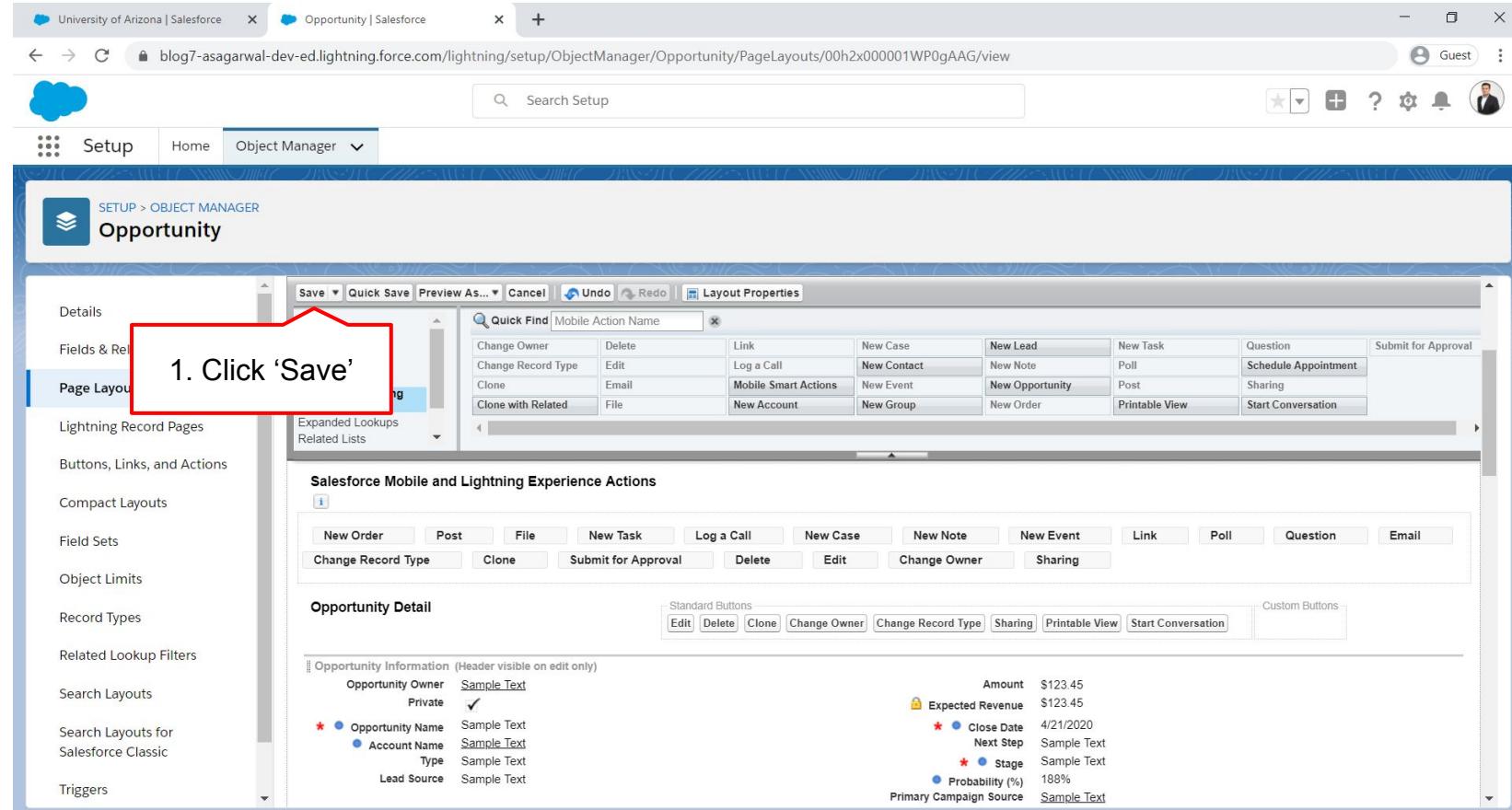
- Tab Bar:** University of Arizona | Salesforce, Opportunity | Salesforce.
- Header:** Search Setup, Guest.
- Page Layouts:** Opportunity.
- Left Sidebar:** Page Layouts (selected), Details, Fields & Relationships, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, Triggers.
- Main Content:**
  - Opportunity Layout:** Fields, Buttons, Custom Links, Quick Actions, Mobile & Lightning Actions (selected), Expanded Lookups, Related Lists.
  - Mobile & Lightning Actions:** Quick Find (Mobile Actions), Change Owner, Change Record Type, Clone, Clone with Related, Email, File, Mobile Smart Actions (New Account, New Group, New Order), New Event, Post, Printable View, Question, Schedule Appointment, Sharing, Start Conversation.
  - Opportunity Sample:** Highlights Panel (Customize the highlights panel for this page layout...), Quick Actions in the Salesforce Classic Publisher (Post, File, New Task, Log a Call, New Case, New Note, New Event, Link, Poll, Question, Email), Salesforce Mobile and Lightning Experience Actions (Post, File, New Task, Log a Call, New Case, New Note, New Event, Link, Poll, Question, Email).

**Callout 1:** A red callout box highlights the 'Mobile & Lightning Actions' section. Inside the box, the text reads: "1. Drag and drop the global action to section 'Salesforce Mobile and Lightning Experience Actions'. The 'New Order' that you see here is the Global Action that we defined in previous steps". A red arrow points from this callout to the 'Log a Call' button in the 'Salesforce Mobile and Lightning Experience Actions' section.

**Callout 2:** A yellow callout box is positioned over the 'New Order' button in the 'Mobile & Lightning Actions' section. It contains the following details:

- Label: New Order
- Name: New\_Order
- Action Type: Quick Action
- Create Feed Item: No

# Publish Global Action - Object Page Layout



1. Click 'Save'

University of Arizona | Salesforce   Opportunity | Salesforce

blog7-asagarwal-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Opportunity/PageLayouts/00h2x000001WP0gAAG/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Opportunity

Details Fields & Relationships Page Layout Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts Search Layouts for Salesforce Classic Triggers

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

Quick Find Mobile Action Name

Change Owner	Delete	Link	New Case	New Lead	New Task	Question	Submit for Approval
Change Record Type	Edit	Log a Call	New Contact	New Note	Poll	Schedule Appointment	
Clone	Email	Mobile Smart Actions	New Event	New Opportunity	Post	Sharing	
Clone with Related	File	New Account	New Group	New Order	Printable View	Start Conversation	

Salesforce Mobile and Lightning Experience Actions

New Order Post File New Task Log a Call New Case New Note New Event Link Poll Question Email Change Record Type Clone Submit for Approval Delete Edit Change Owner Sharing

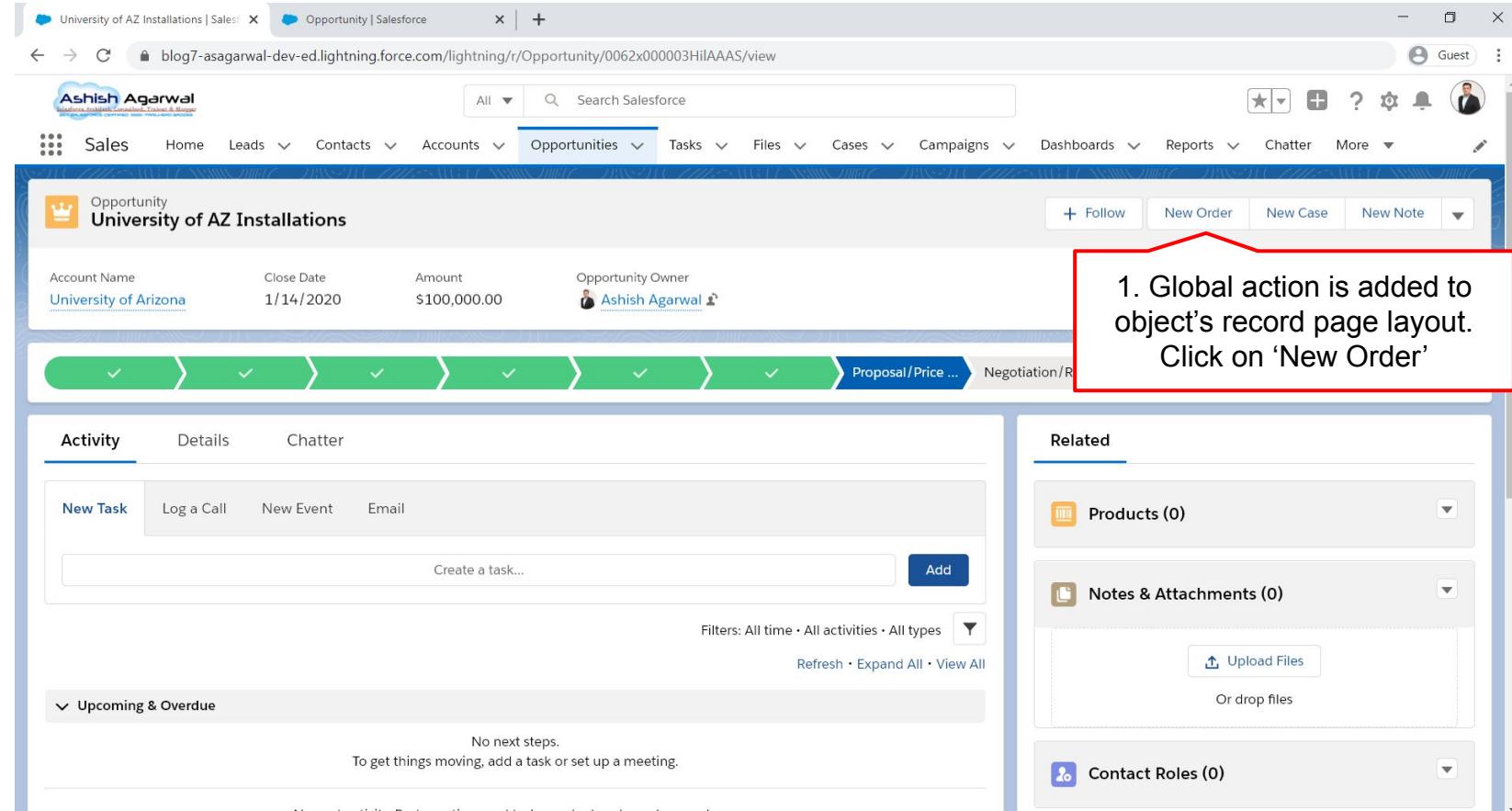
Opportunity Detail

Standard Buttons Edit Delete Clone Change Owner Change Record Type Sharing Printable View Start Conversation Custom Buttons

Opportunity Information (Header visible on edit only)

Opportunity Owner	Sample Text	Amount	\$123.45
Private	✓	Expected Revenue	\$123.45
Opportunity Name	Sample Text	Close Date	4/21/2020
Account Name	Sample Text	Next Step	Sample Text
Type	Sample Text	Stage	Sample Text
Lead Source	Sample Text	Probability (%)	188%
		Primary Campaign Source	Sample Text

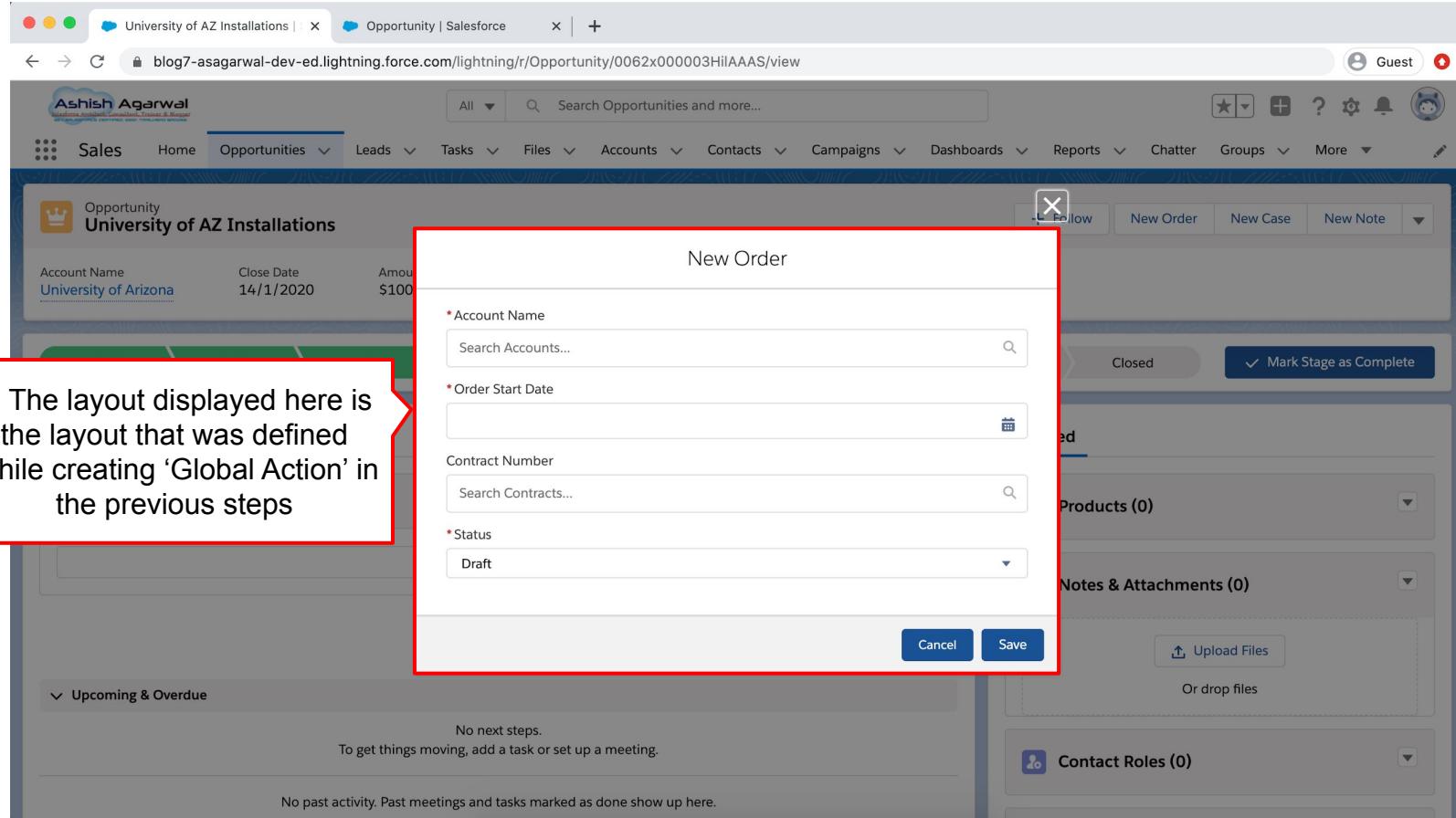
# Publish Global Action - Object Page Layout



The screenshot shows a Salesforce Opportunity record page for 'University of AZ Installations'. The top navigation bar includes tabs for Sales, Home, Leads, Contacts, Accounts, Opportunities (selected), Tasks, Files, Cases, Campaigns, Dashboards, Reports, Chatter, and More. A global action 'New Order' is highlighted with a red box and a callout, indicating it has been added to the object's record page layout. The main content area displays the opportunity details: Account Name (University of Arizona), Close Date (1/14/2020), Amount (\$100,000.00), and Opportunity Owner (Ashish Agarwal). Below the details is a green progress bar with several steps, and the 'Proposal/Price ...' step is currently selected. The 'Activity' tab is active in the left sidebar, showing options for New Task, Log a Call, New Event, and Email, along with a 'Create a task...' input field and an 'Add' button. The 'Related' sidebar shows sections for Products (0), Notes & Attachments (0), and Contact Roles (0), each with an 'Upload Files' or 'Or drop files' button.

1. Global action is added to object's record page layout. Click on 'New Order'

# Publish Global Action - Object Page Layout



1. The layout displayed here is the layout that was defined while creating 'Global Action' in the previous steps

New Order

\* Account Name  
Search Accounts...

\* Order Start Date  
Contract Number  
Search Contracts...

\* Status  
Draft

Cancel Save

Upcoming & Overdue

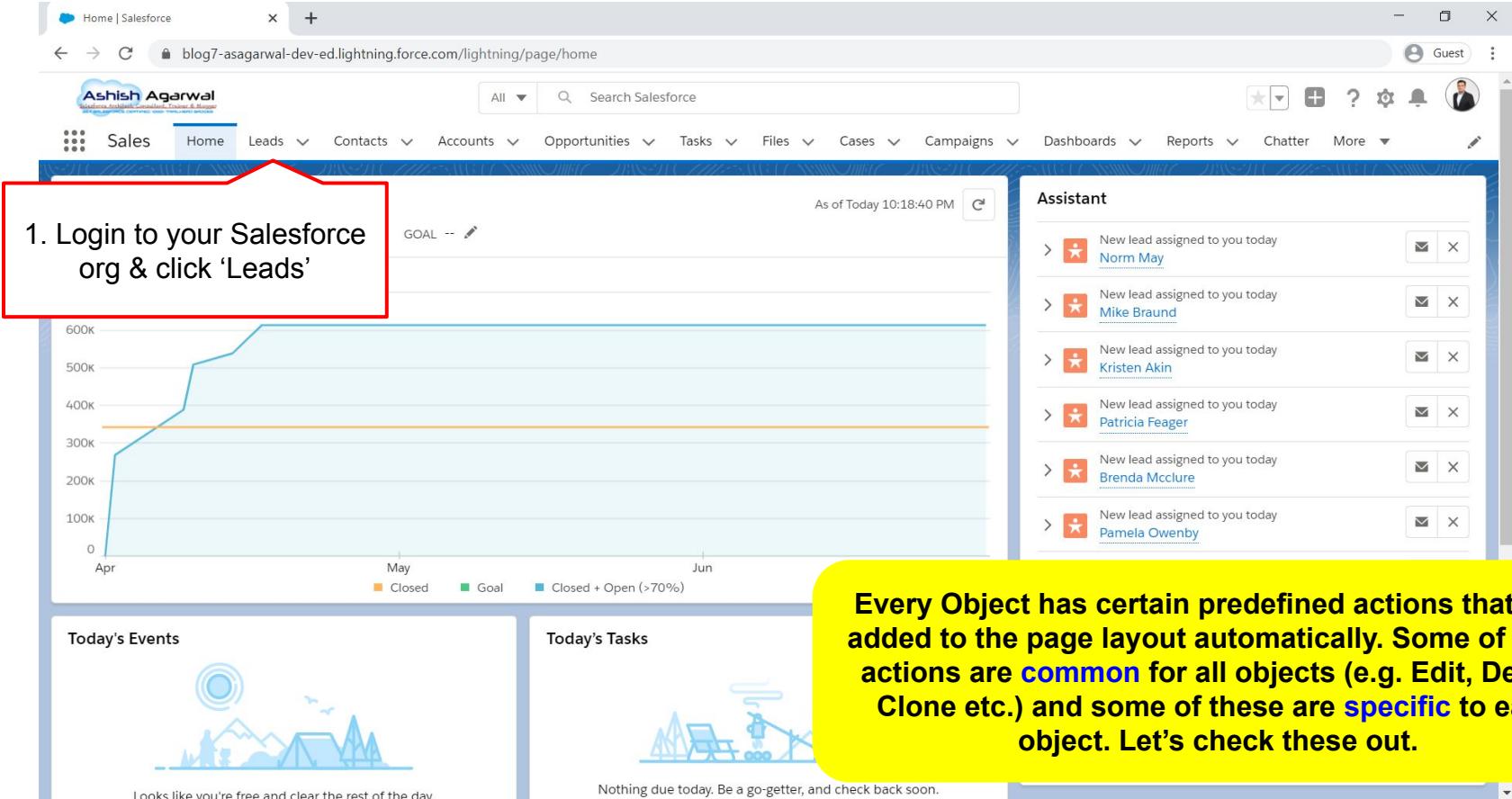
No next steps.  
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

# Steps Overview



# Object Specific Actions



1. Login to your Salesforce org & click 'Leads'

As of Today 10:18:40 PM

GOAL --

600K  
500K  
400K  
300K  
200K  
100K  
0

Apr May Jun

■ Closed ■ Goal ■ Closed + Open (>70%)

Today's Events

Today's Tasks

Nothing due today. Be a go-getter, and check back soon.

Assistant

- >  New lead assigned to you today [Norm May](#)
- >  New lead assigned to you today [Mike Braund](#)
- >  New lead assigned to you today [Kristen Akin](#)
- >  New lead assigned to you today [Patricia Feager](#)
- >  New lead assigned to you today [Brenda McClure](#)
- >  New lead assigned to you today [Pamela Owenby](#)

Every Object has certain predefined actions that gets added to the page layout automatically. Some of these actions are **common** for all objects (e.g. Edit, Delete, Clone etc.) and some of these are **specific** to each object. Let's check these out.

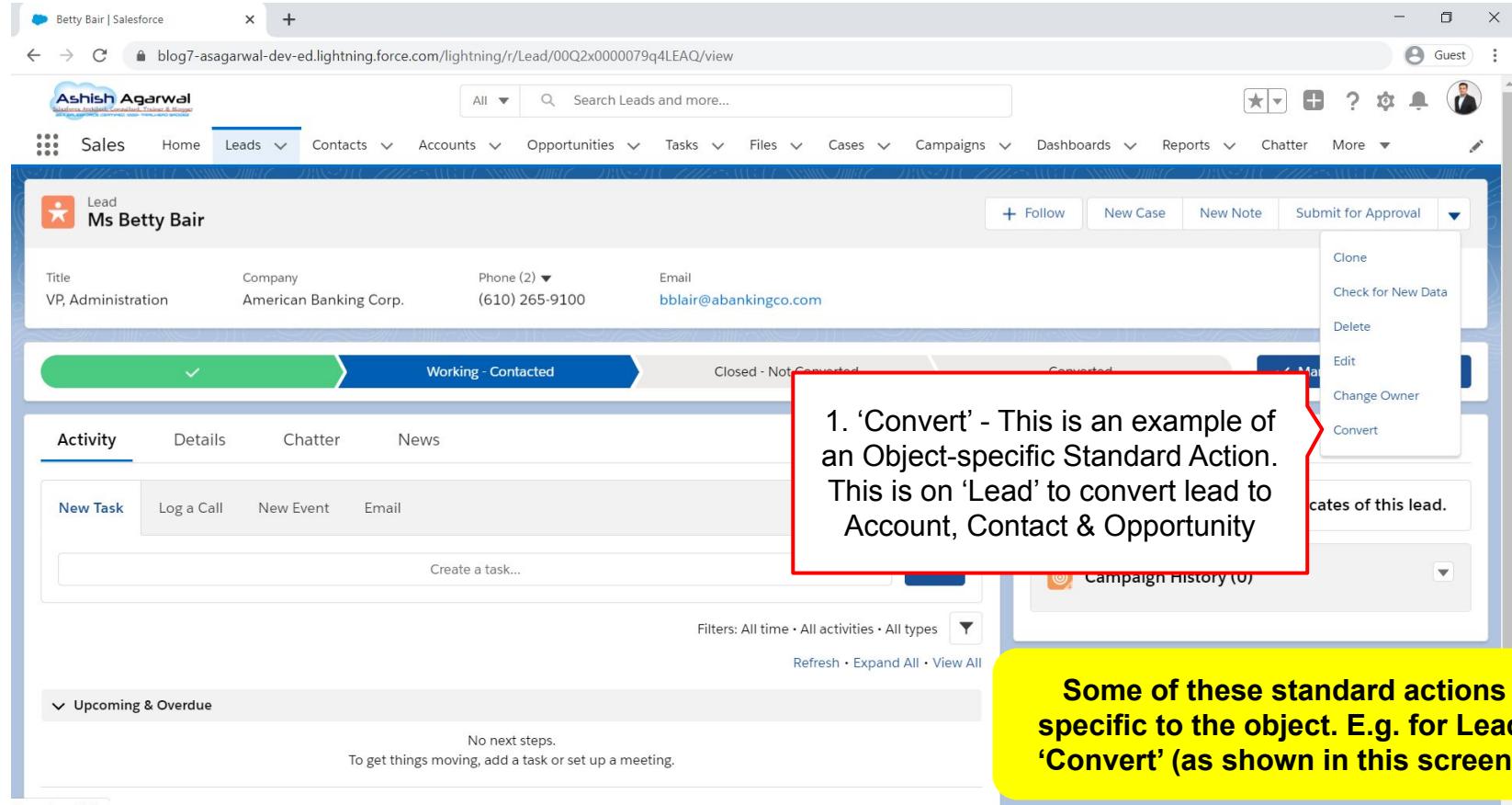
# Object Specific Actions

The screenshot shows a Salesforce Lead record page for 'Ms Betty Bair'. The page includes a sidebar with various actions:

1. Navigate to any Lead record page
2. The actions which appear here are Quick Actions. They can be
  - Object Specific Action - Standard (e.g. Edit, Delete)
  - Object Specific Action - Custom (defined by you)
  - Global Action - Standard (e.g. New Note)
  - Global Action - Custom (defined by you)

The sidebar actions listed are: Follow, New Case, New Note, Submit for Approval, Clone, Check for New Data, Delete, Edit, Change Owner, and Convert. The 'Edit' action is highlighted with a checkmark.

# Object Specific Actions



Betty Bair | Salesforce

blog7-asagarwal-dev-ed.lightning.force.com/lightning/r/Lead/00Q2x0000079q4LEAQ/view

Ashish Agarwal  
Salesforce Admin, Consultant, Trainer & Author  
MCSE, MCDBA, MCSE Cloud & Data, MCSE AI & ML

Leads

Lead Ms Betty Bair

Title: VP, Administration Company: American Banking Corp. Phone (2): (610) 265-9100 Email: bblair@abankingco.com

Working - Contacted

Closed - Not Converted

Connected

Activity Details Chatter News

New Task Log a Call New Event Email

Create a task...

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.  
To get things moving, add a task or set up a meeting.

Clone  
Check for New Data  
Delete  
Edit  
Change Owner  
Convert

1. 'Convert' - This is an example of an Object-specific Standard Action. This is on 'Lead' to convert lead to Account, Contact & Opportunity

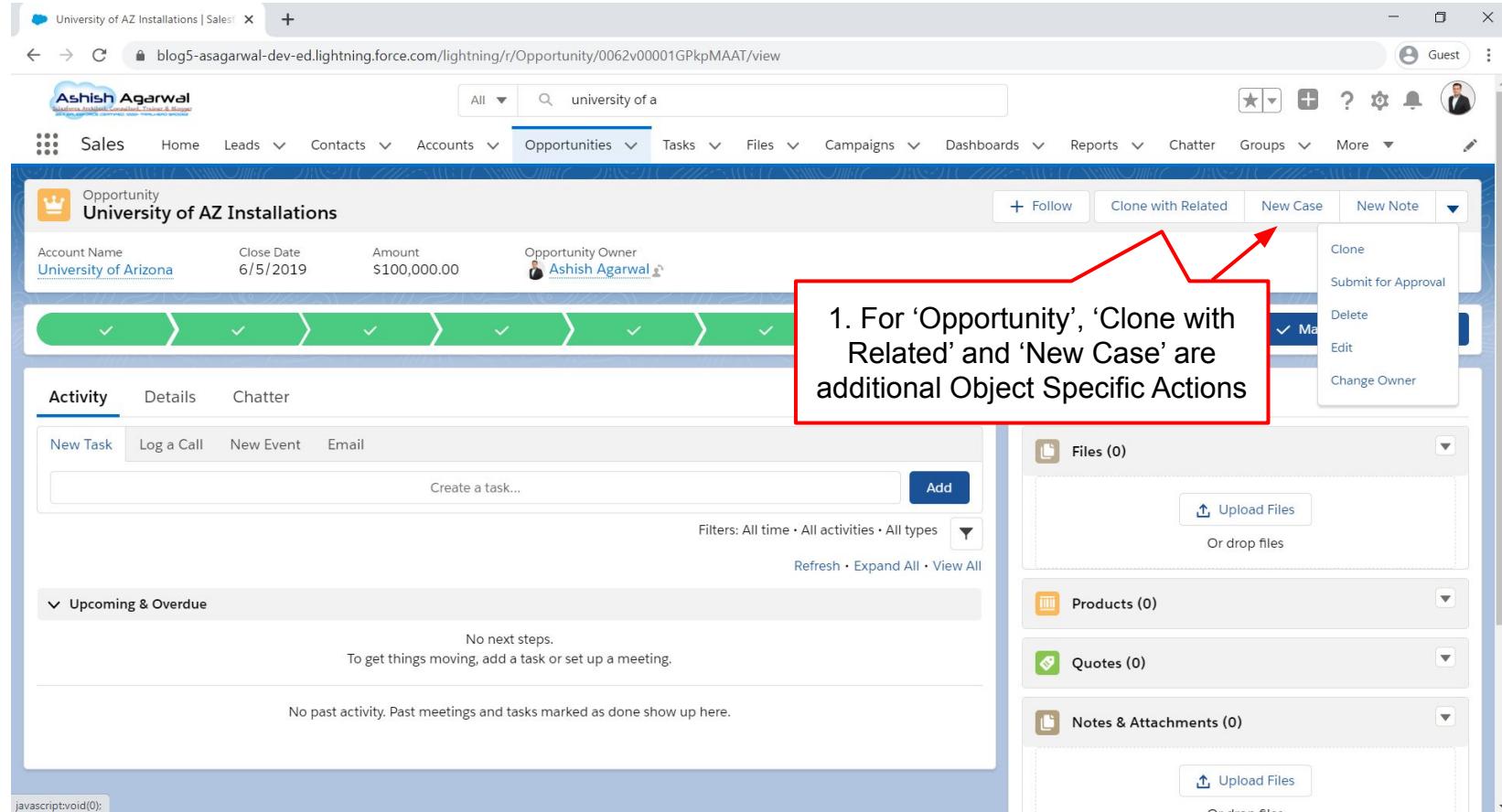
Some of these standard actions are specific to the object. E.g. for Lead it is 'Convert' (as shown in this screenshot)

# Object Specific Actions

The screenshot shows the Salesforce Lightning interface for a Contact record. The top navigation bar has tabs for 'Jane Grey | Salesforce' and 'Lead | Salesforce'. The main content area is for a Contact named 'Ms. Jane Grey'. The top right of the contact card has three buttons: '+ Follow', 'Update Contact' (which is highlighted with a red box), and 'View Contact Hierarchy'. A red box also highlights the text '1. For 'Contact' object, 'Update Contact', 'View Contact Hierarchy' are additional standard Object Specific Actions' located in the center of the page. To the right of the contact card is a sidebar with various actions: 'New Note', 'Submit for Approval', 'Clone', 'Edit', 'Delete', 'Change Owner', and 'Check for New Data'. Below the contact card, there are sections for 'Related' (with tabs for 'Details' and 'News'), 'Opportunities (0)', 'Cases (1)', and a detailed view of a case record. The bottom right of the page shows sections for 'Upcoming & Overdue' tasks and past activity.

1. For 'Contact' object, 'Update Contact', 'View Contact Hierarchy' are additional standard Object Specific Actions

# Object Specific Actions



University of AZ Installations | Sales

blog5-asagarwal-dev-ed.lightning.force.com/lightning/r/Opportunity/0062v00001GPkpMAAT/view

Guest

Opportunity

University of AZ Installations

Account Name: University of Arizona

Close Date: 6/5/2019

Amount: \$100,000.00

Opportunity Owner: Ashish Agarwal

Activity

Details

Chatter

Clone

Submit for Approval

Delete

Edit

Change Owner

1. For 'Opportunity', 'Clone with Related' and 'New Case' are additional Object Specific Actions

New Task

Log a Call

New Event

Email

Create a task...

Add

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.

To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

Files (0)

Upload Files

Or drop files

Products (0)

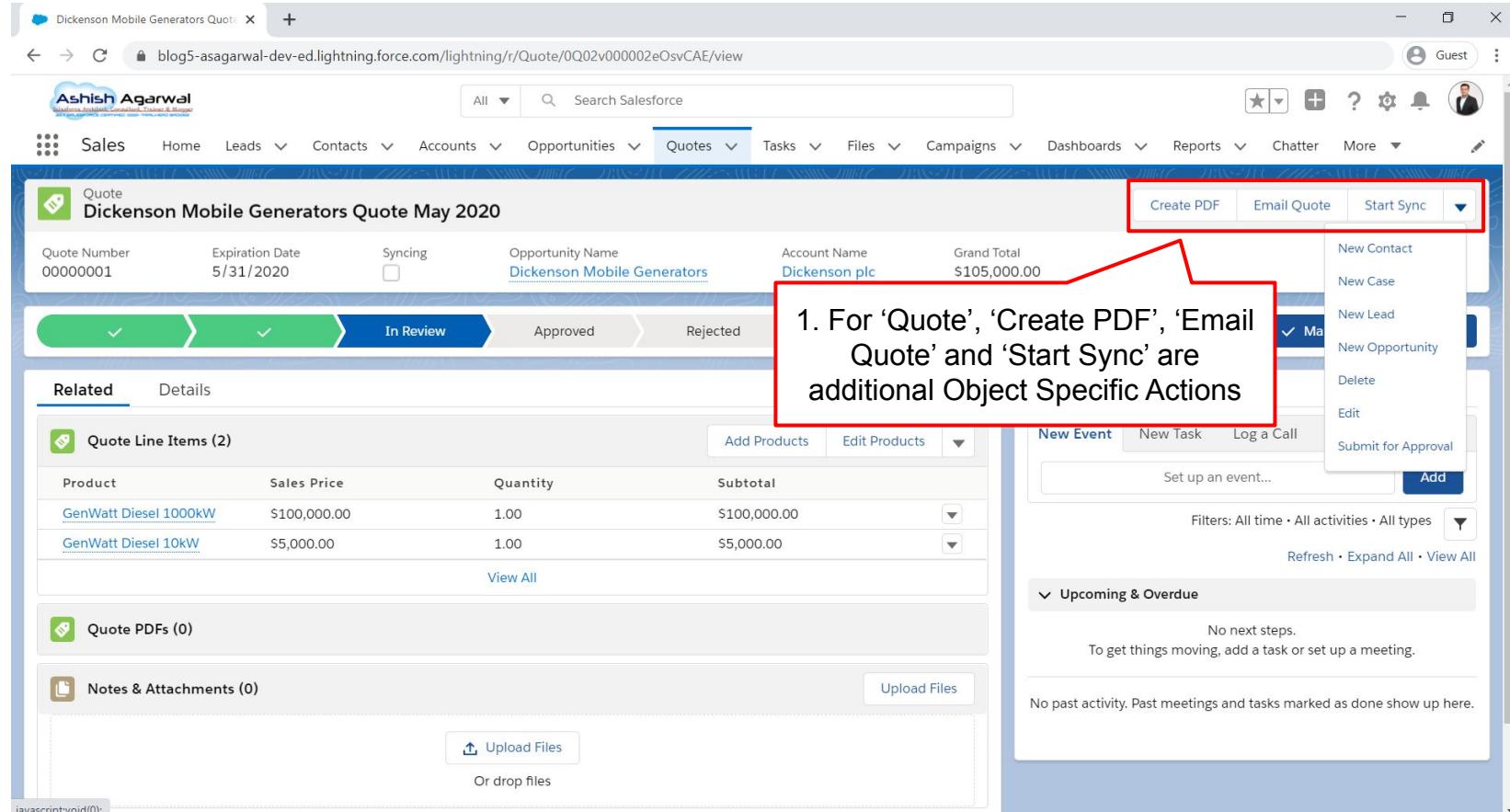
Quotes (0)

Notes & Attachments (0)

Upload Files

Or drop files

# Object Specific Actions



1. For 'Quote', 'Create PDF', 'Email Quote' and 'Start Sync' are additional Object Specific Actions

Dickenson Mobile Generators Quote May 2020

Quote Number: 00000001 | Expiration Date: 5/31/2020 | Syncing:  | Opportunity Name: Dickenson Mobile Generators | Account Name: Dickenson plc | Grand Total: \$105,000.00

Flow: In Review → Approved → Rejected

**Related** **Details**

**Quote Line Items (2)**

Product	Sales Price	Quantity	Subtotal
GenWatt Diesel 1000kW	\$100,000.00	1.00	\$100,000.00
GenWatt Diesel 10kW	\$5,000.00	1.00	\$5,000.00

[View All](#)

**Quote PDFs (0)**

**Notes & Attachments (0)**

[Upload Files](#)

[Upload Files](#)  
Or drop files

**Create PDF** **Email Quote** **Start Sync**

New Contact  
New Case  
New Lead  
New Opportunity  
Delete  
Edit  
Submit for Approval

New Event  
New Task  
Log a Call

Set up an event... [Add](#)

Filters: All time • All activities • All types [Refresh](#) • [Expand All](#) • [View All](#)

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

# Object Specific Actions

The screenshot shows a Salesforce page for a 'Campaign' object. The page title is 'DM Campaign to Top Customers - Nov 12-23, 2001'. The 'Campaign' tab is selected in the top navigation bar. A context menu is open on the right side, listing actions: 'New Lead', 'Edit', 'Delete', 'Clone', 'Submit for Approval', 'Change Owner', and 'View Campaign Hierarchy'. A red callout box highlights the 'View Campaign Hierarchy' option. The page displays various related lists: 'Campaign Hierarchy (0)', 'Attachments (0)', 'Opportunities (0)', and 'Campaign Members'. The 'Attachments' section includes a file upload area with 'Upload Files' and 'Or drop files' buttons. The 'Opportunities' section has a 'New' button. The 'Campaign Members' section has 'Add Leads' and 'Add Contacts' buttons. The 'Activity' section shows a list with a single item: 'No next steps. To get things moving, add a task or set up a meeting.' The sidebar on the left shows navigation links for Sales, Home, Leads, Contacts, Accounts, Opportunities, Tasks, Files, Cases, Campaigns, Dashboards, Reports, Chatter, and More.

1. For 'Campaign', 'View Campaign Hierarchy' is additional Object Specific Action

# Object Specific Actions

The screenshot shows a Salesforce Account page for 'University of Arizona'. The page includes fields for Type (Customer - Direct), Phone ((520) 773-9050), Website (www.universityofarizona.com), Account Owner (Ashish Agarwal), Account Site, and Industry (Education). Below the main details, there are tabs for Related, Details, and News. The Related tab shows a 'Contacts (1)' section with one contact named Jane Grey. The page also includes sections for Opportunities (3) and Chatter.

A context menu is open on the right side of the page, listing various actions: New Opportunity, Change Owner, Check for New Data, Submit for Approval, Edit, Delete, View Account Hierarchy, and View Website. The 'View Account Hierarchy' and 'View Website' options are highlighted with a red box.

**1. For 'Account', 'View Account Hierarchy', 'View Website' is additional Object Specific Action.**

# Object Specific Actions

00001002 | Salesforce +

← → C lock blog7-asagarwal-dev-ed.lightning.force.com/lightning/r/Case/5002x000003AwHcAAK/view

Ashish Agarwal Guest More

All Search Salesforce

Sales Home Leads More Contacts More Accounts More Opportunities More Tasks More Files More Cases More Campaigns More Dashboards More Reports More Chatter More More

Case **Seeking guidance on electrical wiring installation for GC5060**

Priority: Low Status: New Case Number: 00001002

Feed Activity Related

**Open Activities (0)** New Task New Event

**Activity History (0)** View All

**Case Comments (0)** New

**Attachments (0)** Upload Files

Or drop files

1. For 'Case', 'View Case Hierarchy' is additional Object Specific Action

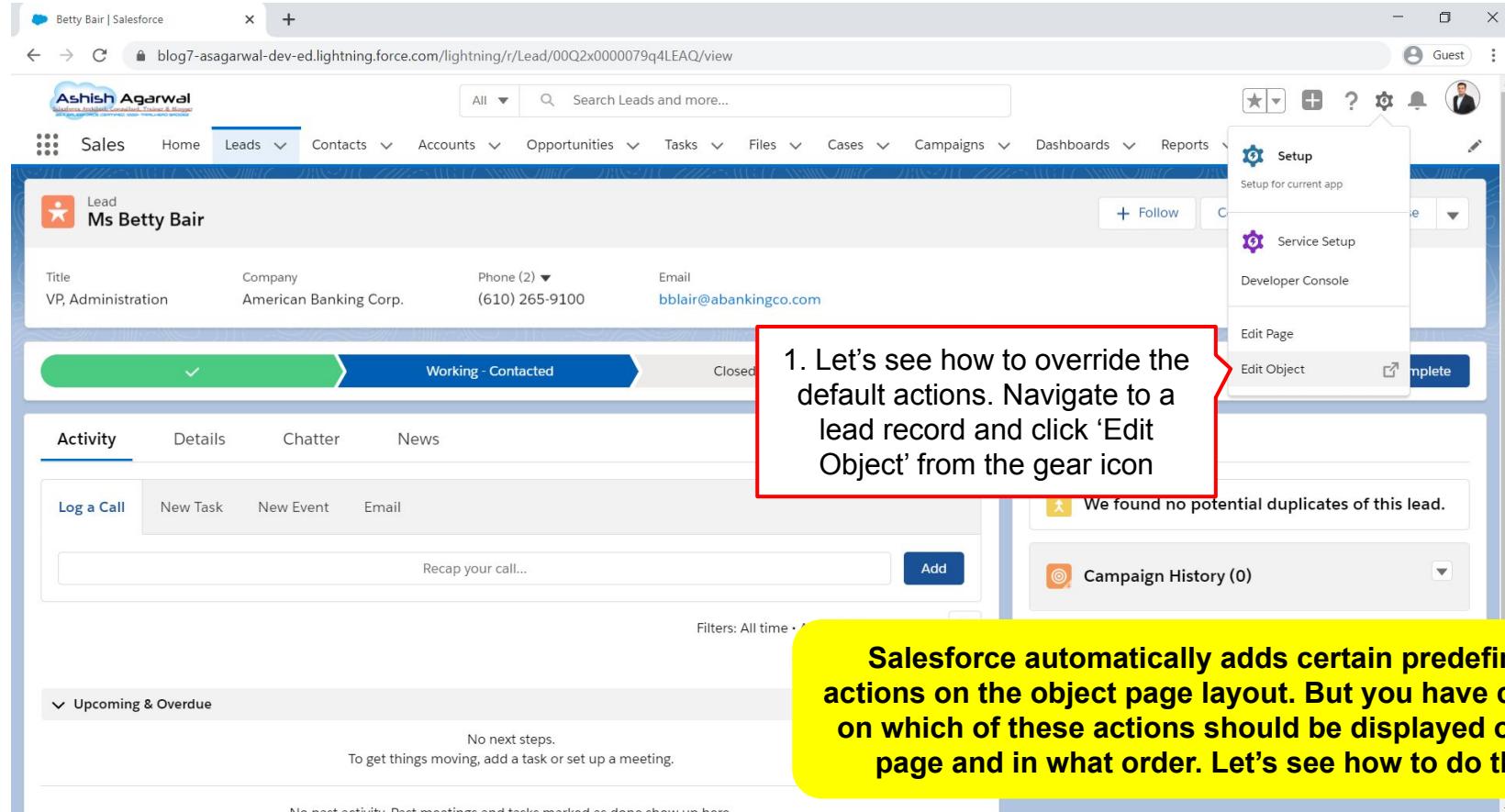
Clone  
Change Owner  
**View Case Hierarchy**  
Printable View

Case Owner: Ashish Agarwal  
Status: New  
Case Number: 00001002  
Priority: Low  
Contact Name: Stella Pavlova  
Account Name: United Oil & Gas Corp.  
Type: Electrical  
Case Reason: Installation  
Web Email  
Web Name  
Date/Time Opened  
Web Company  
Web Phone  
Date/Time Closed

# Steps Overview



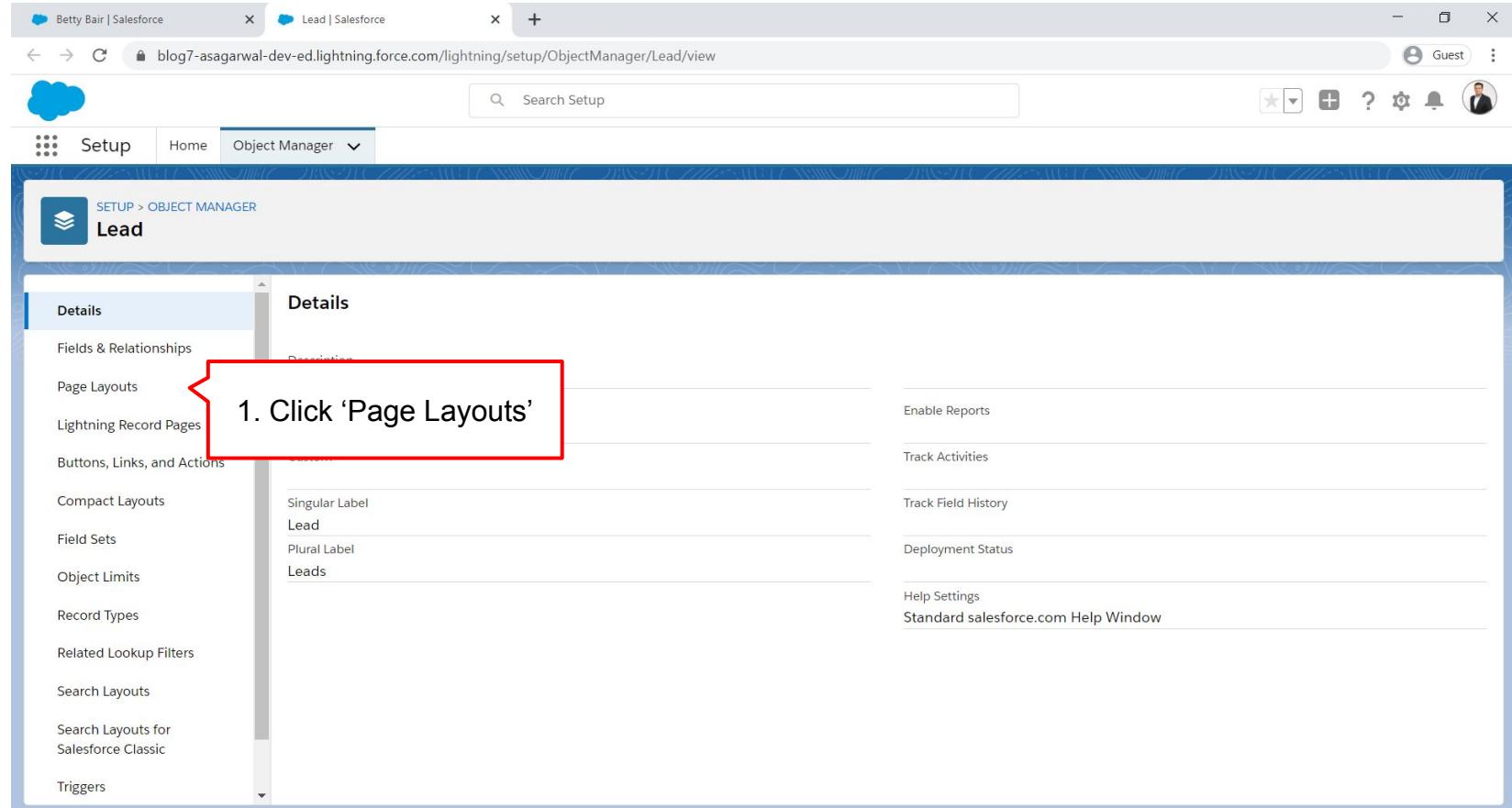
# Override Predefined Actions



1. Let's see how to override the default actions. Navigate to a lead record and click 'Edit Object' from the gear icon

Salesforce automatically adds certain predefined actions on the object page layout. But you have control on which of these actions should be displayed on the page and in what order. Let's see how to do that

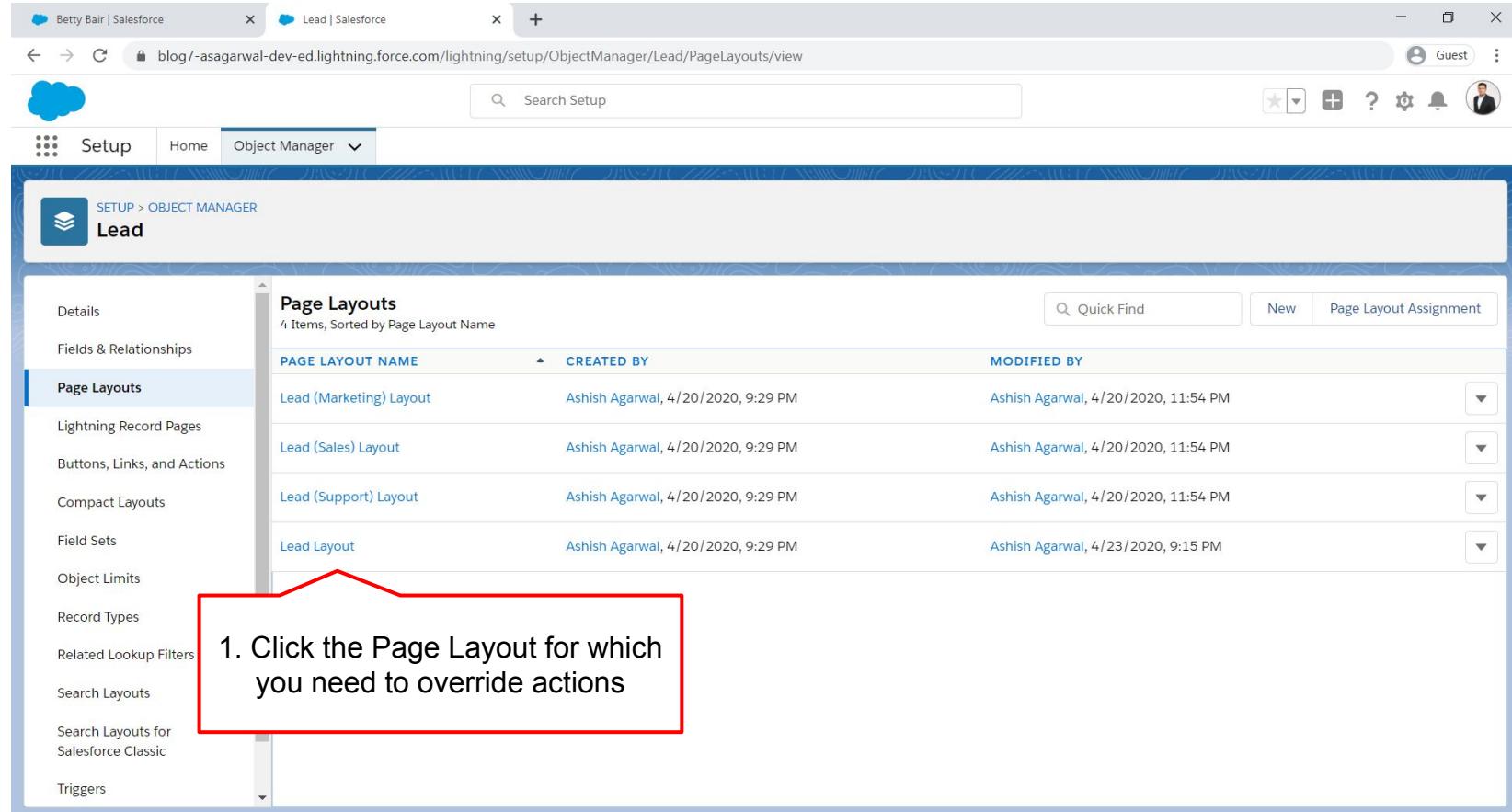
# Override Predefined Actions



The screenshot shows the Salesforce Setup interface for the Lead object. The browser tabs are 'Betty Bair | Salesforce' and 'Lead | Salesforce'. The URL is 'blog7-asagarwal-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Lead/view'. The page title is 'SETUP > OBJECT MANAGER Lead'. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts (highlighted with a red box and a callout), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, and Triggers. The main content area shows the 'Details' tab for the Lead object, with sections for Singular Label ('Lead') and Plural Label ('Leads'). To the right, there are several checkboxes: Enable Reports, Track Activities, Track Field History, Deployment Status, and Help Settings ('Standard salesforce.com Help Window'). A red callout points to the 'Page Layouts' option in the sidebar with the text '1. Click 'Page Layouts''.

1. Click 'Page Layouts'

# Override Predefined Actions

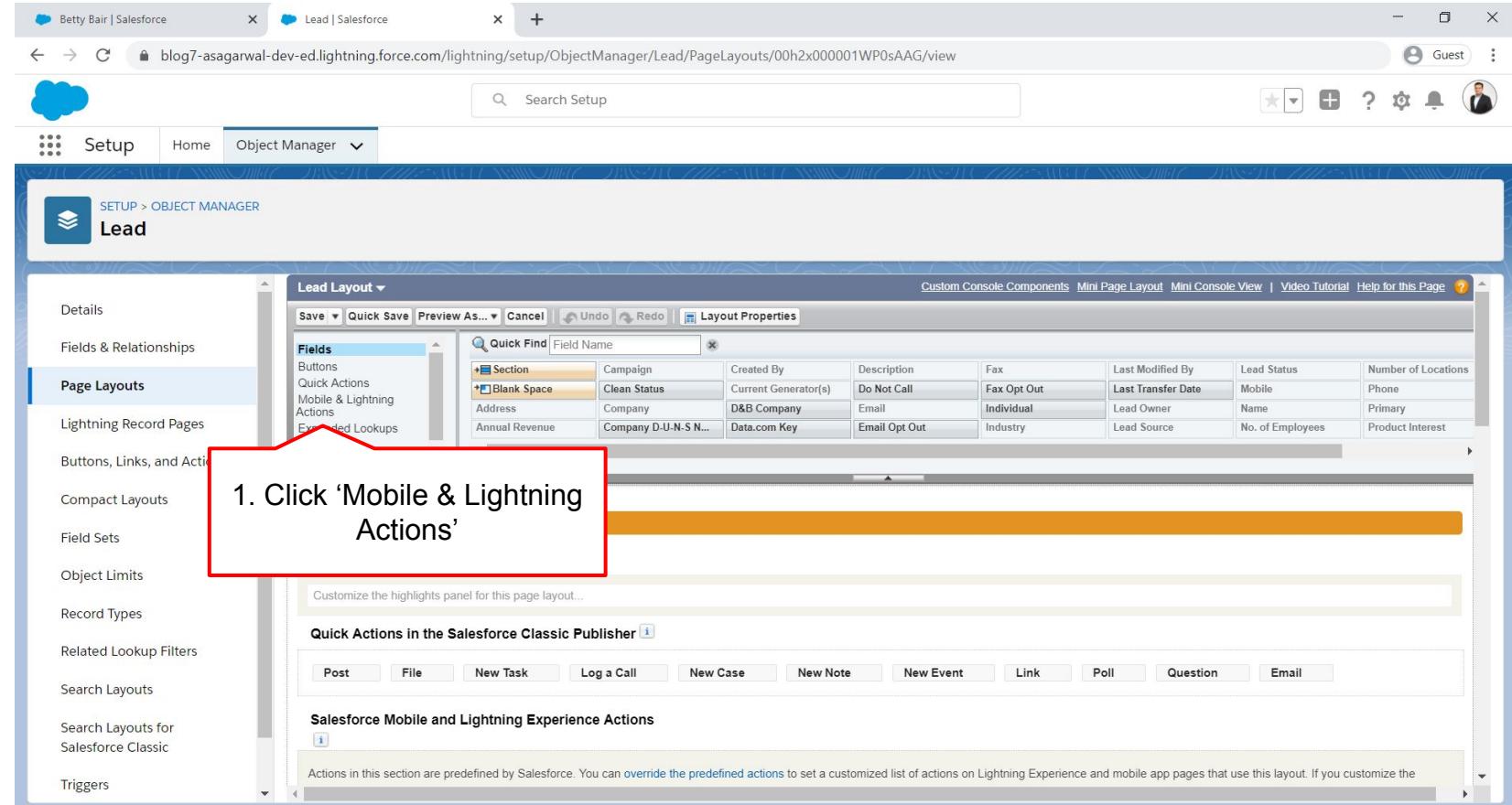


Lead Page Layouts List:

Page Layout Name	Created By	Modified By
Lead (Marketing) Layout	Ashish Agarwal, 4/20/2020, 9:29 PM	Ashish Agarwal, 4/20/2020, 11:54 PM
Lead (Sales) Layout	Ashish Agarwal, 4/20/2020, 9:29 PM	Ashish Agarwal, 4/20/2020, 11:54 PM
Lead (Support) Layout	Ashish Agarwal, 4/20/2020, 9:29 PM	Ashish Agarwal, 4/20/2020, 11:54 PM
Lead Layout	Ashish Agarwal, 4/20/2020, 9:29 PM	Ashish Agarwal, 4/23/2020, 9:15 PM

1. Click the Page Layout for which you need to override actions

# Override Predefined Actions



1. Click 'Mobile & Lightning Actions'

The screenshot shows the Salesforce Setup interface with the Lead Object Manager selected. The left sidebar lists various setup categories, and the main area shows the Lead Layout configuration. A red box highlights the 'Mobile & Lightning Actions' section in the 'Fields' list, which contains buttons for 'Section', 'Blank Space', 'Address', and 'Annual Revenue'.

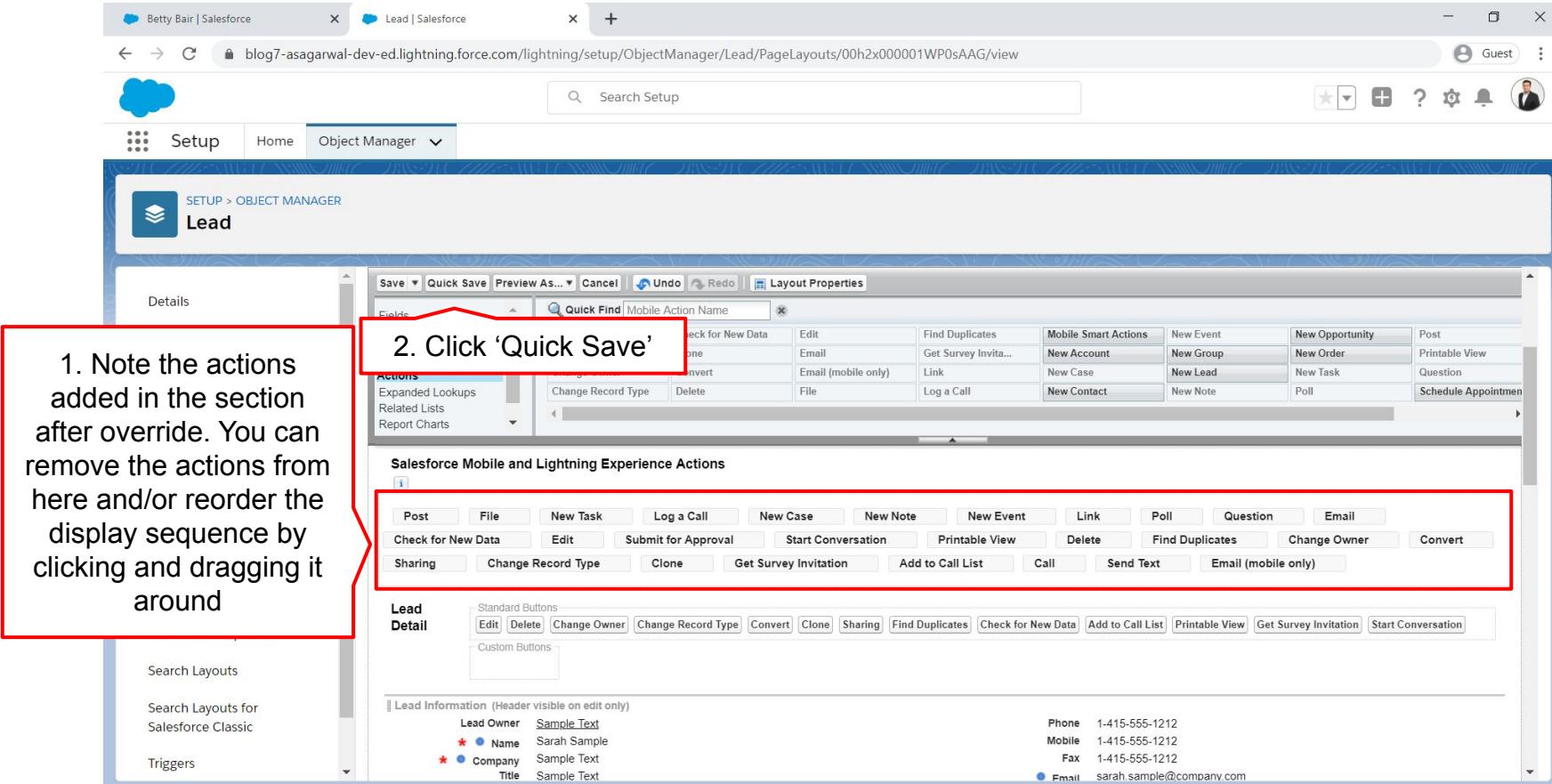
Section	Campaign	Created By	Description	Fax	Last Modified By	Lead Status	Number of Locations
Blank Space	Clean Status	Current Generator(s)	Do Not Call	Fax Opt Out	Last Transfer Date	Mobile	Phone
	Company	D&B Company	Email	Individual	Lead Owner	Name	Primary
	Annual Revenue	Company D-U-N-S N...	Data.com Key	Email Opt Out	Industry	Lead Source	No. of Employees
							Product Interest

# Override Predefined Actions

1. Click 'Override the predefined actions'

The actions such as Edit, Delete, Clone, Convert, Change Owner, Submit for Approval, New Case, New Note, Check for New Data & Printable View will be added to the page layout by default.

# Override Predefined Actions



1. Note the actions added in the section after override. You can remove the actions from here and/or reorder the display sequence by clicking and dragging it around

2. Click 'Quick Save'

Details

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

Fields Quick Find Mobile Action Name

Actions	Check for New Data	Edit	Find Duplicates	Mobile Smart Actions	New Event	New Opportunity	Post
Expanded Lookups	Check for New Data	Email	Get Survey Invita...	New Account	New Group	New Order	Printable View
Related Lists	One	Email (mobile only)	Link	New Case	New Lead	New Task	Question
Report Charts	Convert	File	Log a Call	New Contact	New Note	Poll	Schedule Appointment
	Change Record Type	Delete					

Salesforce Mobile and Lightning Experience Actions

Post	File	New Task	Log a Call	New Case	New Note	New Event	Link	Poll	Question	Email	Convert
Check for New Data	Edit	Submit for Approval	Start Conversation	Printable View	Delete	Find Duplicates	Change Owner				
Sharing	Change Record Type	Clone	Get Survey Invitation	Add to Call List	Call	Send Text	Email (mobile only)				

Lead Detail

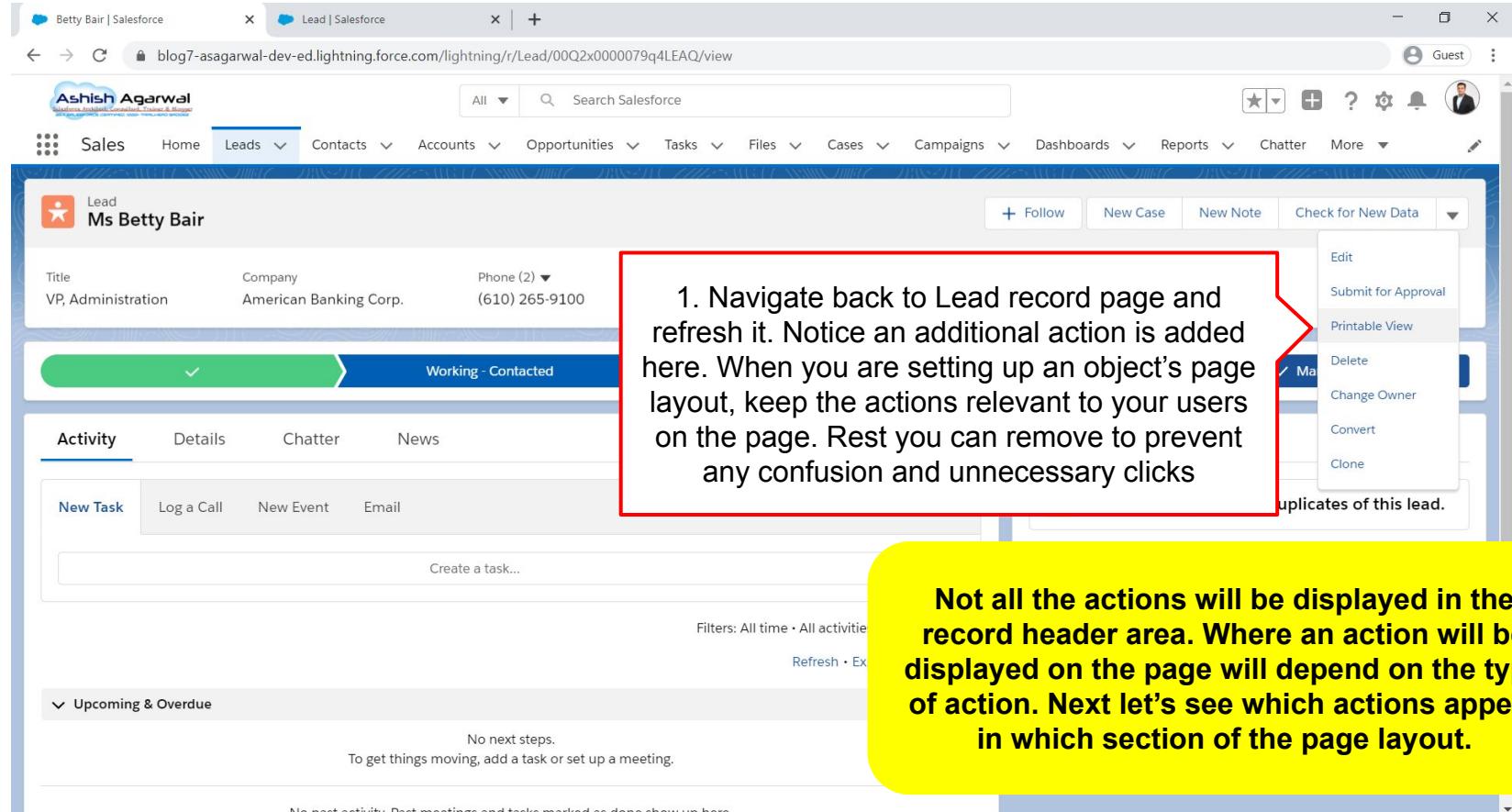
Standard Buttons: Edit, Delete, Change Owner, Change Record Type, Convert, Clone, Sharing, Find Duplicates, Check for New Data, Add to Call List, Printable View, Get Survey Invitation, Start Conversation

Custom Buttons: [empty]

Lead Information (Header visible on edit only)

Lead Owner: Sample Text	Phone: 1-415-555-1212
* Name: Sarah Sample	Mobile: 1-415-555-1212
* Company: Sample Text	Fax: 1-415-555-1212
Title: Sample Text	Email: sarah.sample@company.com

# Override Predefined Actions



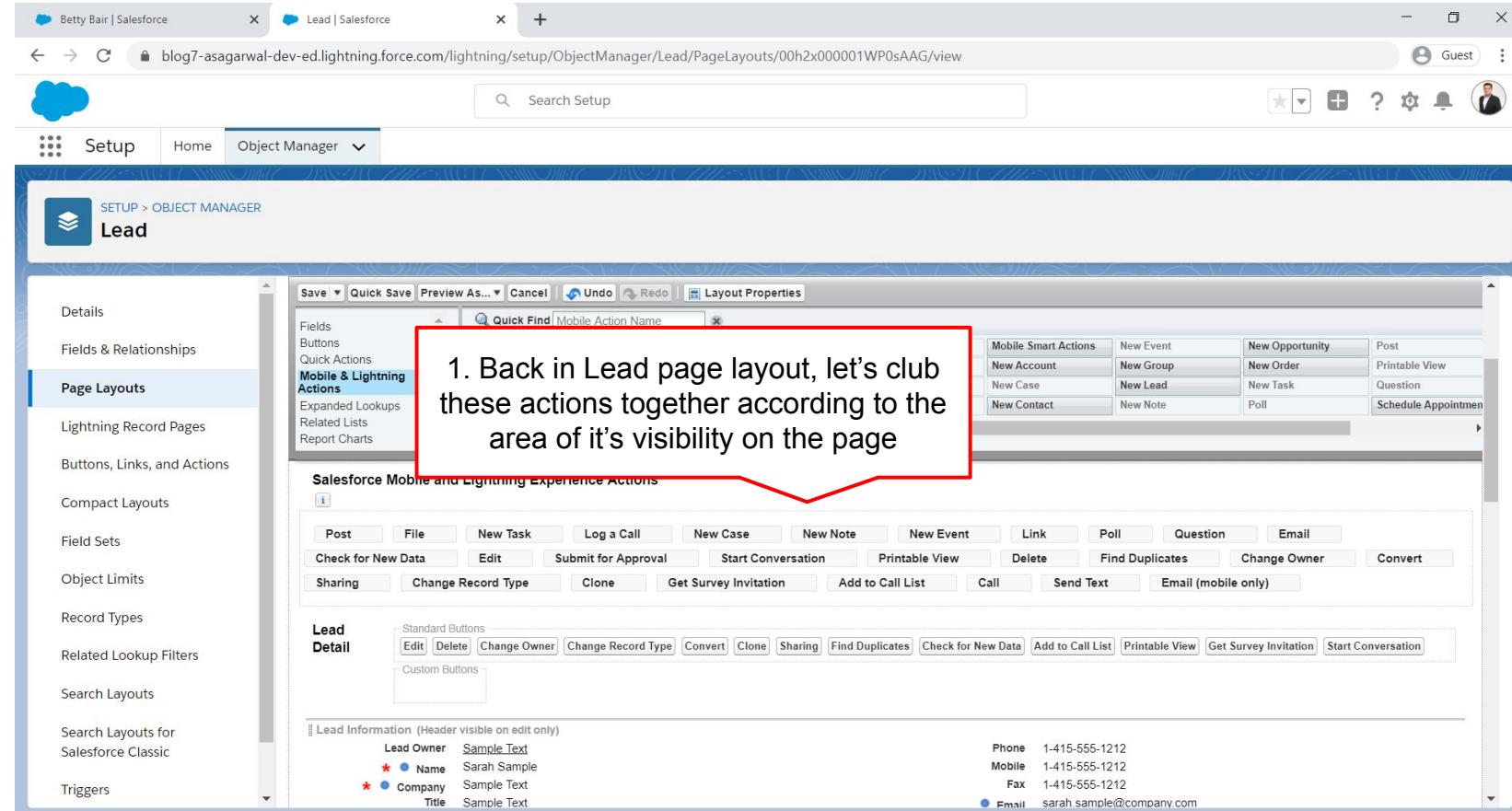
1. Navigate back to Lead record page and refresh it. Notice an additional action is added here. When you are setting up an object's page layout, keep the actions relevant to your users on the page. Rest you can remove to prevent any confusion and unnecessary clicks

Not all the actions will be displayed in the record header area. Where an action will be displayed on the page will depend on the type of action. Next let's see which actions appear in which section of the page layout.

# Steps Overview



# Which Action will be Displayed Where on the Page



1. Back in Lead page layout, let's club these actions together according to the area of it's visibility on the page

Lead Detail

Lead Information (Header visible on edit only)

Lead Owner	Sample Text
★ ● Name	Sarah Sample
★ ● Company	Sample Text
Title	Sample Text

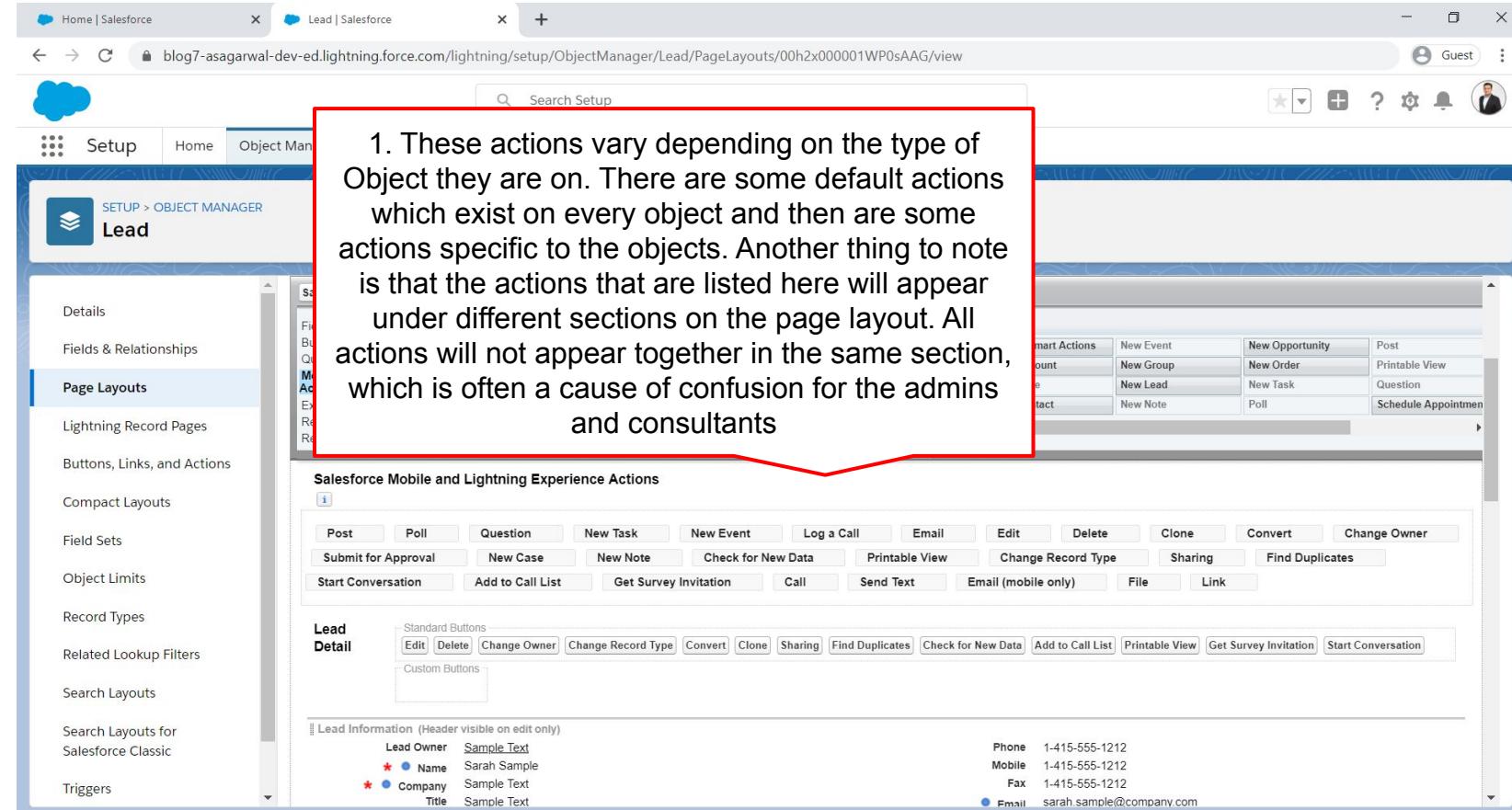
Mobile Smart Actions	New Event	New Opportunity	Post
New Account	New Group	New Order	Printable View
New Case	New Lead	New Task	Question
New Contact	New Note	Poll	Schedule Appointment

Post File New Task Log a Call New Case New Note New Event Link Poll Question Email

Check for New Data Edit Submit for Approval Start Conversation Printable View Delete Find Duplicates Change Owner Convert

Sharing Change Record Type Clone Get Survey Invitation Add to Call List Call Send Text Email (mobile only)

# Which Action will be Displayed Where on the Page



1. These actions vary depending on the type of Object they are on. There are some default actions which exist on every object and then are some actions specific to the objects. Another thing to note is that the actions that are listed here will appear under different sections on the page layout. All actions will not appear together in the same section, which is often a cause of confusion for the admins and consultants

**Salesforce Mobile and Lightning Experience Actions**

Post	Poll	Question	New Task	New Event	Log a Call	Email	Edit	Delete	Clone	Convert	Change Owner
Submit for Approval	New Case	New Note	Check for New Data	Printable View	Change Record Type	Sharing	Find Duplicates				
Start Conversation	Add to Call List	Get Survey Invitation	Call	Send Text	Email (mobile only)	File	Link				

**Lead Detail**

Standard Buttons	Edit	Delete	Change Owner	Change Record Type	Convert	Clone	Sharing	Find Duplicates	Check for New Data	Add to Call List	Printable View	Get Survey Invitation	Start Conversation
------------------	------	--------	--------------	--------------------	---------	-------	---------	-----------------	--------------------	------------------	----------------	-----------------------	--------------------

**Custom Buttons**

**Lead Information (Header visible on edit only)**

Lead Owner	Sample Text	Phone	1-415-555-1212
* Name	Sarah Sample	Mobile	1-415-555-1212
* Company	Sample Text	Fax	1-415-555-1212
Title	Sample Text	Email	sarah.sample@company.com

# Which Action will be Displayed Where on the Page

The image shows two screenshots of the Salesforce interface. On the left, the 'Object Manager' page for 'Lead' is displayed, with a red box highlighting the 'Chatter' tab in the navigation bar. On the right, a 'Lead' detail page for 'Ms Betty Bair' is shown, with a red box highlighting the 'Chatter' tab in the navigation bar and another red box highlighting the 'Post' button in the Chatter component.

1. Post, Poll, Question & Announcements (announcements not shown here) are standard Chatter actions, so they will be visible only in the Chatter Component

Lead

Lead

Activity Details Chatter News

Post Poll Question

Share an update... Share

Most Recent Activity

Lead Information (Header visible on edit only)

Lead Owner	Sample Text
★ ● Name	Sarah Sample
★ ● Company	Sample Text
Title	Sample Text

Phone: 1-415-555-1212  
Mobile: 1-415-555-1212  
Fax: 1-415-555-1212  
Email: sarah.sample@company.com

# Which Action will be Displayed Where on the Page

The screenshot shows the Salesforce Setup Object Manager for the Lead object. On the left, the 'Activity' component is selected. A red box highlights the text: '2. New (Task, Event), Log a Call are default actions and Email is productivity action. They will be visible only in the Activity component, **except for the 'Case' object**'. A red arrow points from this text to the 'Activity' component in the layout configuration. Another red arrow points from the 'Email' button in the layout configuration to the 'Email' button in the 'Activity' component of the Lead detail page on the right. The Lead detail page shows the record for 'Ms Betty Bair' with various buttons like 'New Task', 'New Event', 'Log a Call', and 'Email'.

2. New (Task, Event), Log a Call are default actions and Email is productivity action. They will be visible only in the Activity component, **except for the 'Case' object**

Activity Details Chatter News

New Task New Event Log a Call Email

Post Poll Question New Task New Event Log a Call Email

Submit for Approval New Case New Note Check for New Data Printable View Change Record Type Sharing Find Duplicates

Start Conversation Add to Call List Get Survey Invitation Call Send Text Email (mobile only) File Link

Lead Detail Standard Buttons Edit Delete Change Owner Change Record Type Convert Clone Sharing Find Duplicates Check for New Data Add to Call List Printable View Get Survey Invitation Start Conversation

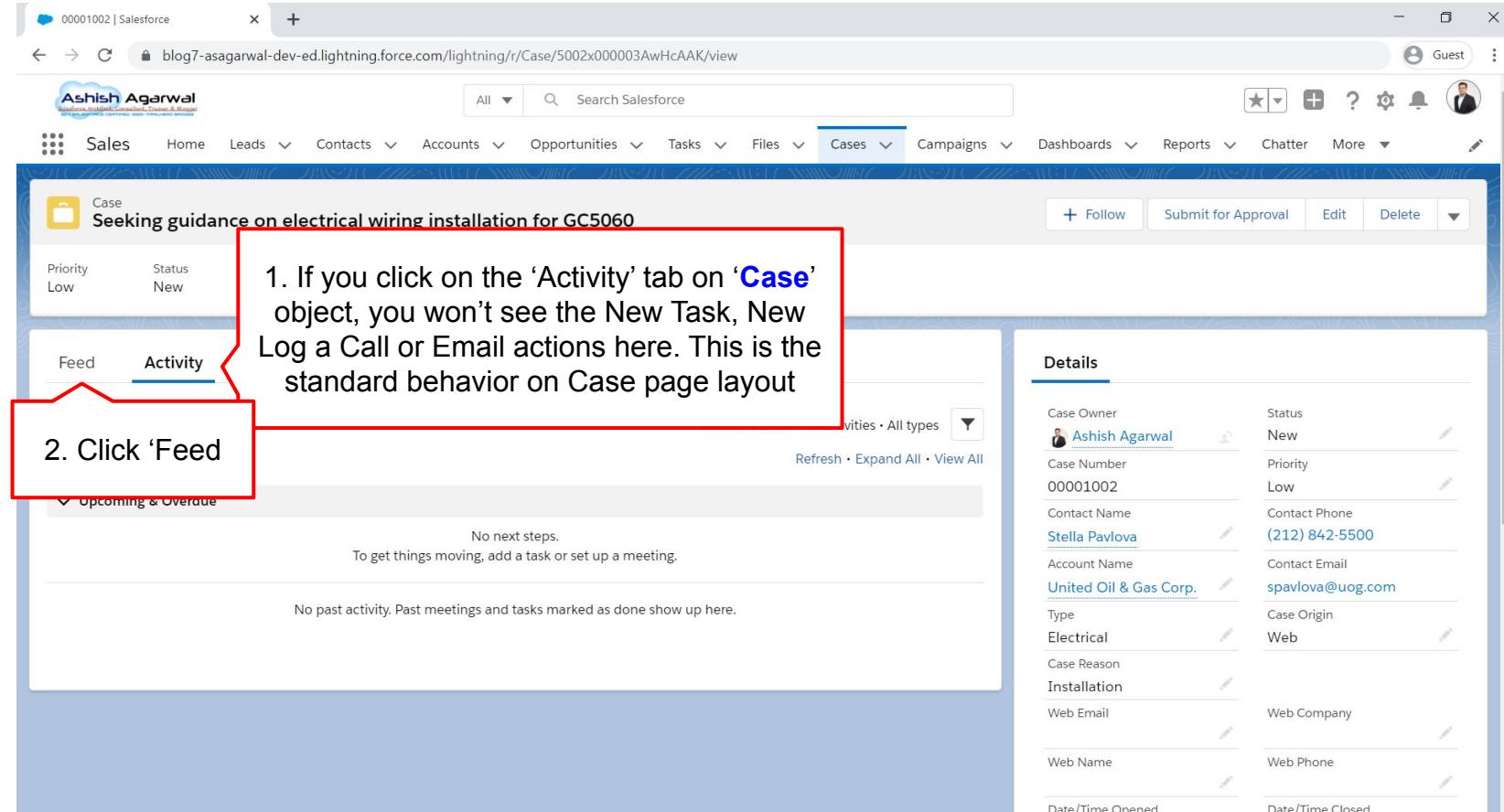
Custom Buttons

Lead Information (Header visible on edit only)

Lead Owner	Sample Text
* Name	Sarah Sample
* Company	Sample Text
Title	Sample Text

Phone	1-415-555-1212
Mobile	1-415-555-1212
Fax	1-415-555-1212
Email	sarah.sample@company.com

# Which Action will be Displayed Where on the Page

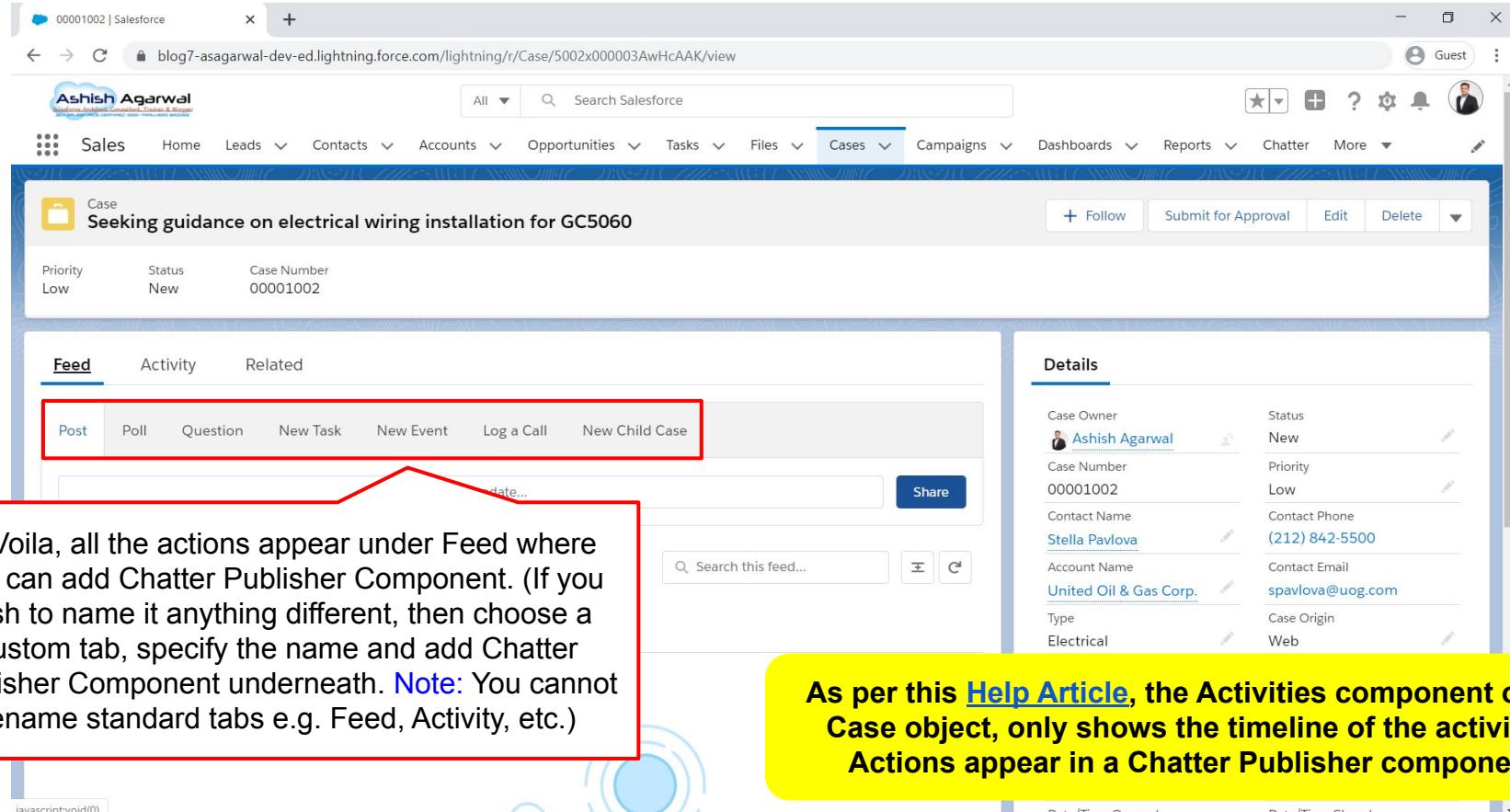


The screenshot shows a Salesforce Case page for a case titled "Seeking guidance on electrical wiring installation for GC5060". The page includes a header with a user profile for "Ashish Agarwal", a search bar, and a navigation bar with tabs for Sales, Home, Leads, Contacts, Accounts, Opportunities, Tasks, Files, Cases, Campaigns, Dashboards, Reports, Chatter, and More. The main content area displays the case details and an activity feed. A red box highlights the "Activity" tab in the feed section, with the text "1. If you click on the 'Activity' tab on 'Case' object, you won't see the New Task, New Log a Call or Email actions here. This is the standard behavior on Case page layout". Another red box highlights the "Feed" tab in the feed section, with the text "2. Click 'Feed'". The right side of the page shows the "Details" section with various case fields: Case Owner (Ashish Agarwal), Status (New), Case Number (00001002), Priority (Low), Contact Name (Stella Pavlova), Account Name (United Oil & Gas Corp.), Type (Electrical), Case Reason (Installation), Web Email, Web Name, Date/Time Opened, and Date/Time Closed.

1. If you click on the 'Activity' tab on 'Case' object, you won't see the New Task, New Log a Call or Email actions here. This is the standard behavior on Case page layout

2. Click 'Feed'

# Which Action will be Displayed Where on the Page



The screenshot shows a Salesforce Case detail page for Case 5002x000003AwHcAAK. The page includes a header with navigation, a search bar, and a top menu with links like Sales, Home, Leads, Contacts, Accounts, Opportunities, Tasks, Files, Cases, Campaigns, Dashboards, Reports, Chatter, and More. The main content area displays the Case details: Case Number 00001002, Priority Low, and Status New. Below this is a 'Feed' section with tabs for Feed, Activity, and Related. A red box highlights the 'Feed' tab and the action buttons: Post, Poll, Question, New Task, New Event, Log a Call, and New Child Case. To the right is a 'Details' sidebar with Case Owner (Ashish Agarwal), Status (New), Case Number (00001002), Priority (Low), Contact Name (Stella Pavlova), Account Name (United Oil & Gas Corp.), Type (Electrical), and Case Origin (Web). A yellow box contains a note about the Activities component.

1. Voila, all the actions appear under Feed where you can add Chatter Publisher Component. (If you wish to name it anything different, then choose a custom tab, specify the name and add Chatter Publisher Component underneath. **Note:** You cannot rename standard tabs e.g. Feed, Activity, etc.)

As per this [Help Article](#), the Activities component on the Case object, only shows the timeline of the activities. Actions appear in a Chatter Publisher component.

# Which Action will be Displayed Where on the Page

The screenshot shows the Salesforce Lead page for 'Ms Betty Bair' and the 'Page Layouts' editor for the 'Lead Detail' page layout.

**Page Layouts Editor:**

- Left sidebar:** Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, Triggers.
- Central area:** Save, Quick Save, Preview As..., Cancel, Undo, Redo, Layout Properties. A 'Quick Find' bar is at the top. Below it is a table for 'Mobile & Lightning Actions' with rows for Add to Call List, Call, Change Owner, Change Record Type, Check for New Data, Clone, Convert, Delete, Email, Email (mobile only), and File.
- Salesforce Mobile and Lightning Experience Actions:** A grid of buttons including Post, Poll, Question, New Task, New Event, Log a Call, Edit, Delete, Clone, Convert, Change Owner, Submit for Approval, New Case, New Note, Check for New Data, Printable View, Change Record Type, Start Conversation, Add to Call List, Get Survey Invitation, Call, Send Text, Email (mobile only), File, and Link.
- Lead Detail:** Standard Buttons (Edit, Delete, Change Owner, Change Record Type, Convert, Clone, Sharing, Find Duplicates, Check for New Data, Add to Call List, Printable View, Get Survey Invitation, Start Conversation) and Custom Buttons.
- Lead Information:** Header visible on edit only, Lead Owner (Sample Text), Name (Sarah Sample), Company (Sample Text), Title (Sample Text), Phone (1-415-555-1212), Mobile (1-415-555-1212), Fax (1-415-555-1212), Email (sarah.sample@company.com).

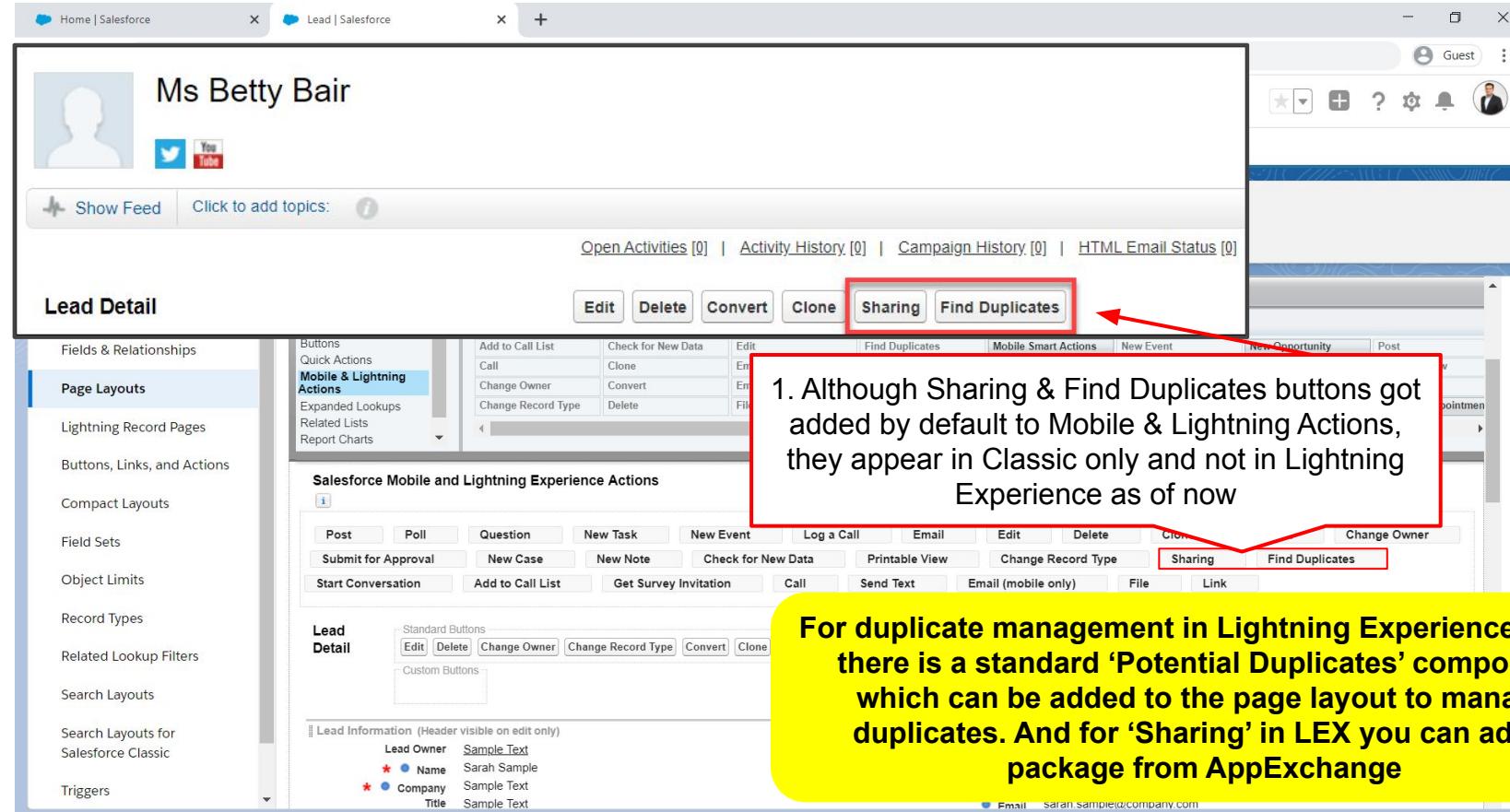
**Lead Page:**

- Header:** Lead (Ms Betty Bair), Title (VP, Administration), Company (American Banking Corp.), Phone (610) 265-9100, Email (bblair@abankingco.com).
- Status Bar:** Working - Contacted, Closed - Not Converted, Converted.
- Actions:** + Follow, Edit, Delete, Clone, Convert, New Case, New Note, Check for New Data, Submit for Approval, Printable View, Change Owner.
- Activity:** Details, Chatter, News.
- Related:** Related list.

**Text Callout:**

3. Edit, Delete, Clone, Convert, Change Owner, Submit for Approval, New Case, New Note, Check for New Data & Printable View, Change Record Type will be seen in Quick Actions section

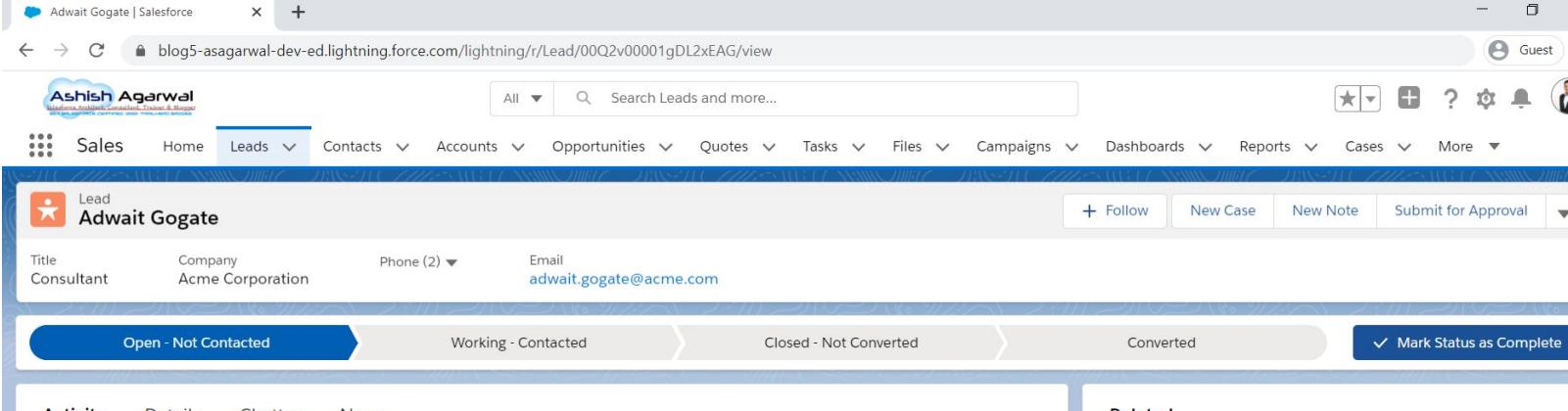
# Which Action will be Displayed Where on the Page



1. Although Sharing & Find Duplicates buttons got added by default to Mobile & Lightning Actions, they appear in Classic only and not in Lightning Experience as of now

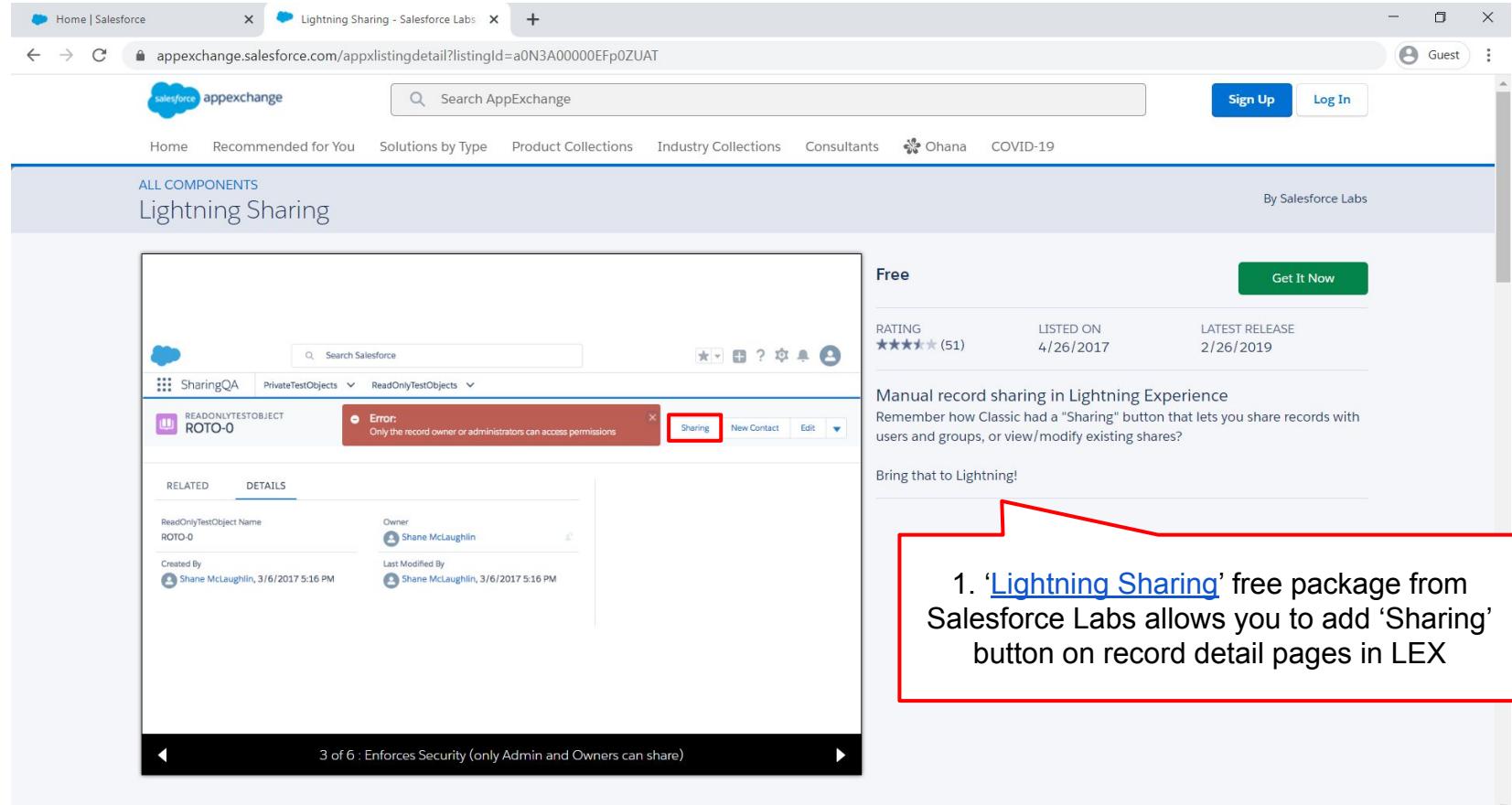
For duplicate management in Lightning Experience (LEX), there is a standard 'Potential Duplicates' component which can be added to the page layout to manage duplicates. And for 'Sharing' in LEX you can add a package from AppExchange

## Which Action will be Displayed Where on the Page



1. Add 'Potential Duplicates' Component to the record detail page which will show possible duplicates (if any)

# Which Action will be Displayed Where on the Page



Home | Salesforce Lightning Sharing - Salesforce Labs +

appexchange.salesforce.com/appxlistingdetail?listingId=a0N3A00000EFp0ZUAT

Guest

Sign Up Log In

Search AppExchange

Home Recommended for You Solutions by Type Product Collections Industry Collections Consultants Ohana COVID-19

ALL COMPONENTS

Lightning Sharing

By Salesforce Labs

SharingQA PrivateTestObjects ReadOnlyTestObjects

REASONONLYTESTOBJECT ROTO-0

Error: Only the record owner or administrators can access permissions

Sharing

Get It Now

Free

RATING ★★★★☆ (51) LISTED ON 4/26/2017 LATEST RELEASE 2/26/2019

Manual record sharing in Lightning Experience  
Remember how Classic had a "Sharing" button that lets you share records with users and groups, or view/modify existing shares?

Bring that to Lightning!

1. ['Lightning Sharing'](#) free package from Salesforce Labs allows you to add 'Sharing' button on record detail pages in LEX

3 of 6 : Enforces Security (only Admin and Owners can share)

Overview Reviews (51)

# Which Action will be Displayed Where on the Page

1. Get Survey Invitation will be visible when Survey is enabled

2. Start Conversation will be visible when Omni-channel & Messaging is Enabled, Add to Call List will be visible when Lightning Dialer is enabled

The point to note on this slide is that some of the Actions will only be displayed when you have enabled certain features in your Salesforce Org

# Which Action will be Displayed Where on the Page

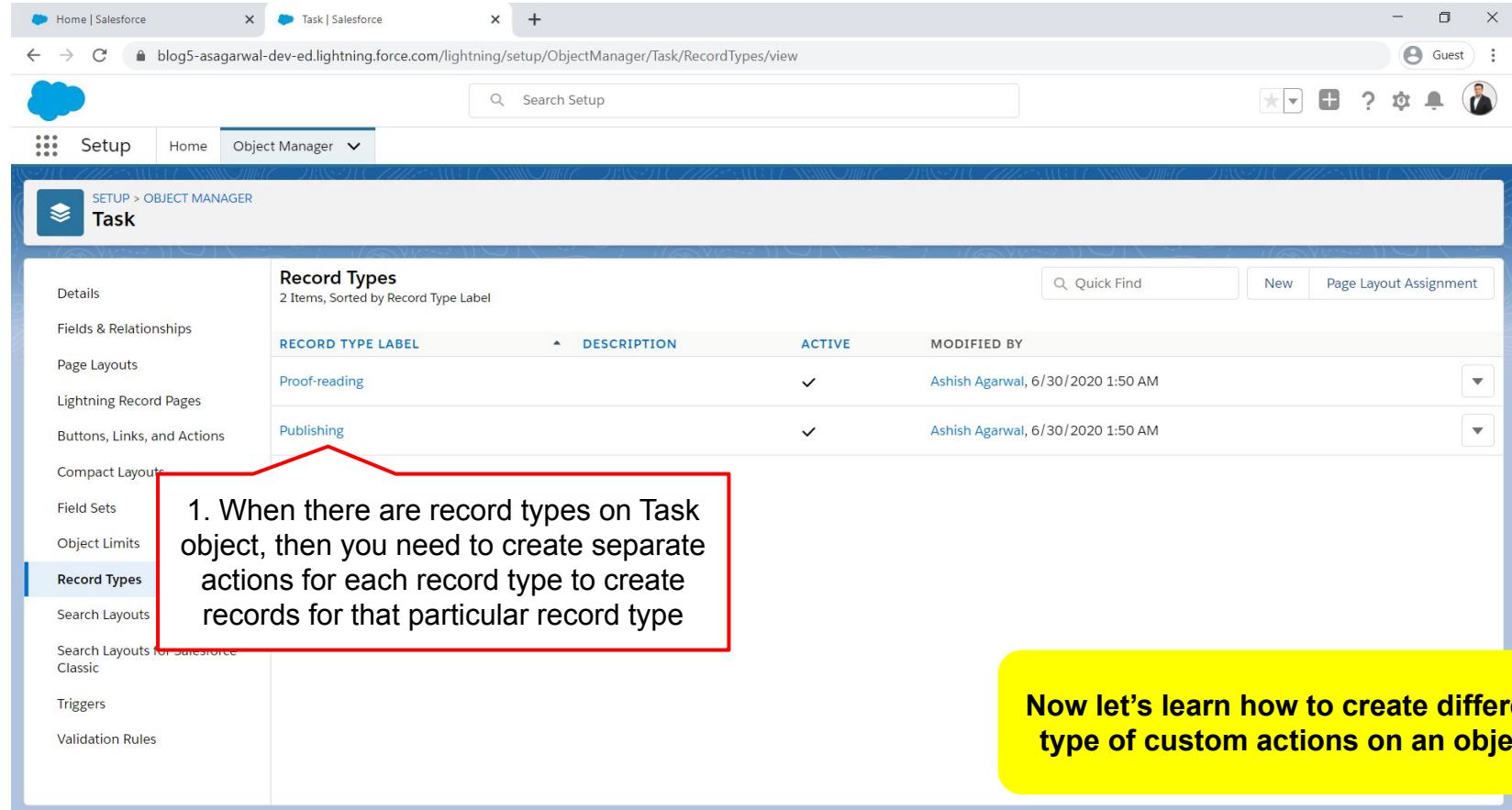
The screenshot illustrates the configuration of a Lead page layout in the Salesforce Setup interface, specifically for the Lead object. The left sidebar shows the 'Page Layouts' section selected under 'Lead'. The main area displays the 'Layout Properties' for the Lead page layout, listing various actions and buttons. A red box highlights the 'Mobile & List Actions' section, which includes actions like 'Call', 'Send Text', 'Email (mobile only)', 'File', and 'Link'. A red bracket groups these actions. A red line connects this group to a mobile phone in the center, which displays the Lead record page. The mobile phone screen shows the 'Actions' section with the same five actions: 'Call', 'Send Text', 'Email (mobile only)', 'File', and 'Link'. A red box highlights these five actions on the mobile screen. A red bracket groups them, and another red bracket groups the entire 'Actions' section on the mobile screen. A callout box with the text '1. Call, Send Text Email (Mobile Only), File, Link will be seen on Lead record page in Salesforce mobile app' points to the highlighted actions on the mobile screen.

1. Call, Send Text Email (Mobile Only), File, Link will be seen on Lead record page in Salesforce mobile app

# Steps Overview



# Custom Actions - Declarative



Home | Salesforce    Task | Salesforce

blog5-asagarwal-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Task/RecordTypes/view

Setup    Home    Object Manager

SETUP > OBJECT MANAGER    Task

Details    Fields & Relationships    Page Layouts    Lightning Record Pages    Buttons, Links, and Actions    Compact Layouts    Field Sets    Object Limits    **Record Types**    Search Layouts

SEARCH SETUP

Record Types

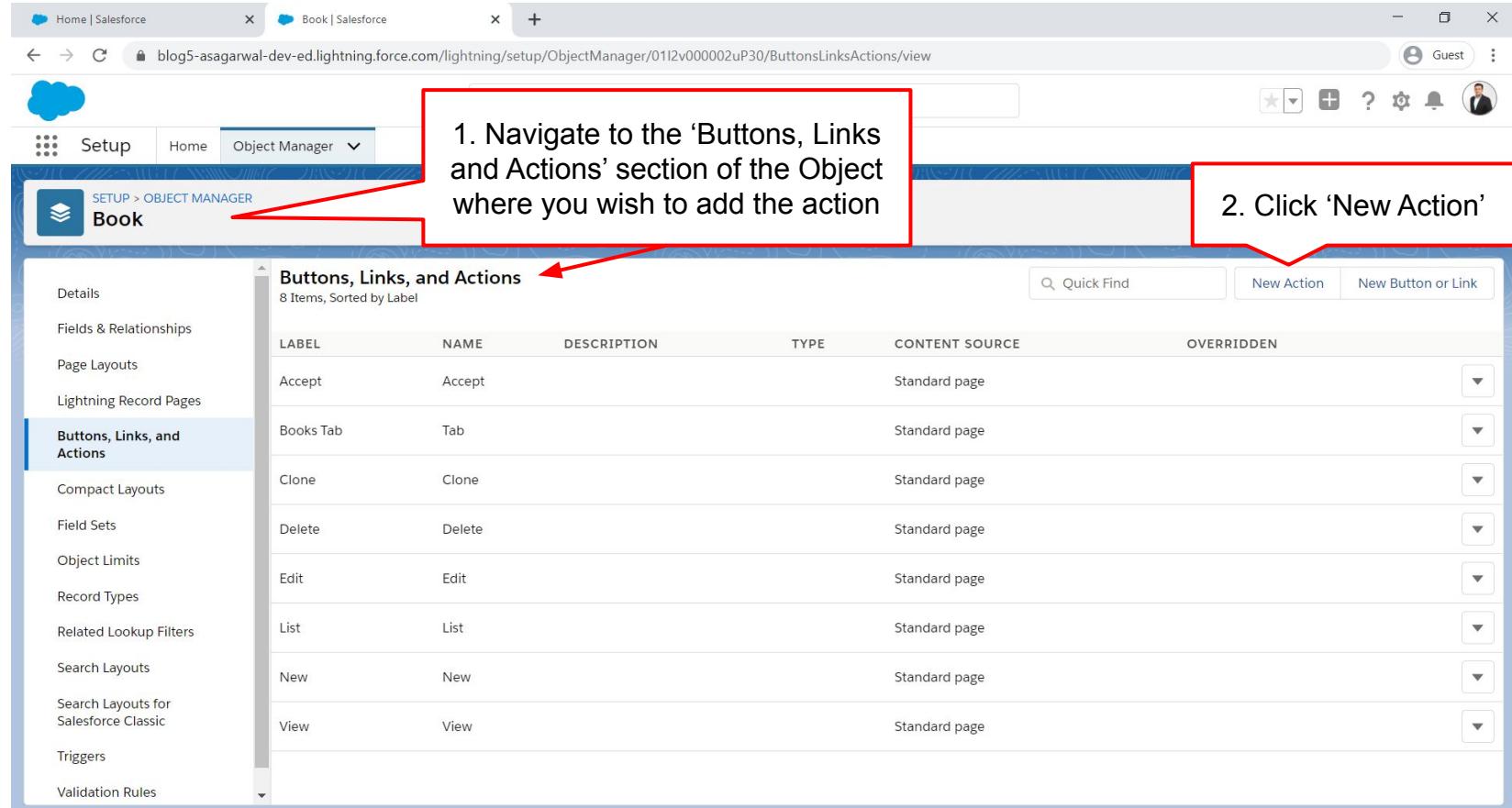
2 Items, Sorted by Record Type Label

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Proof-reading	✓	Ashish Agarwal, 6/30/2020 1:50 AM	
Publishing	✓	Ashish Agarwal, 6/30/2020 1:50 AM	

1. When there are record types on Task object, then you need to create separate actions for each record type to create records for that particular record type

Now let's learn how to create different type of custom actions on an object

# Custom Actions - Declarative



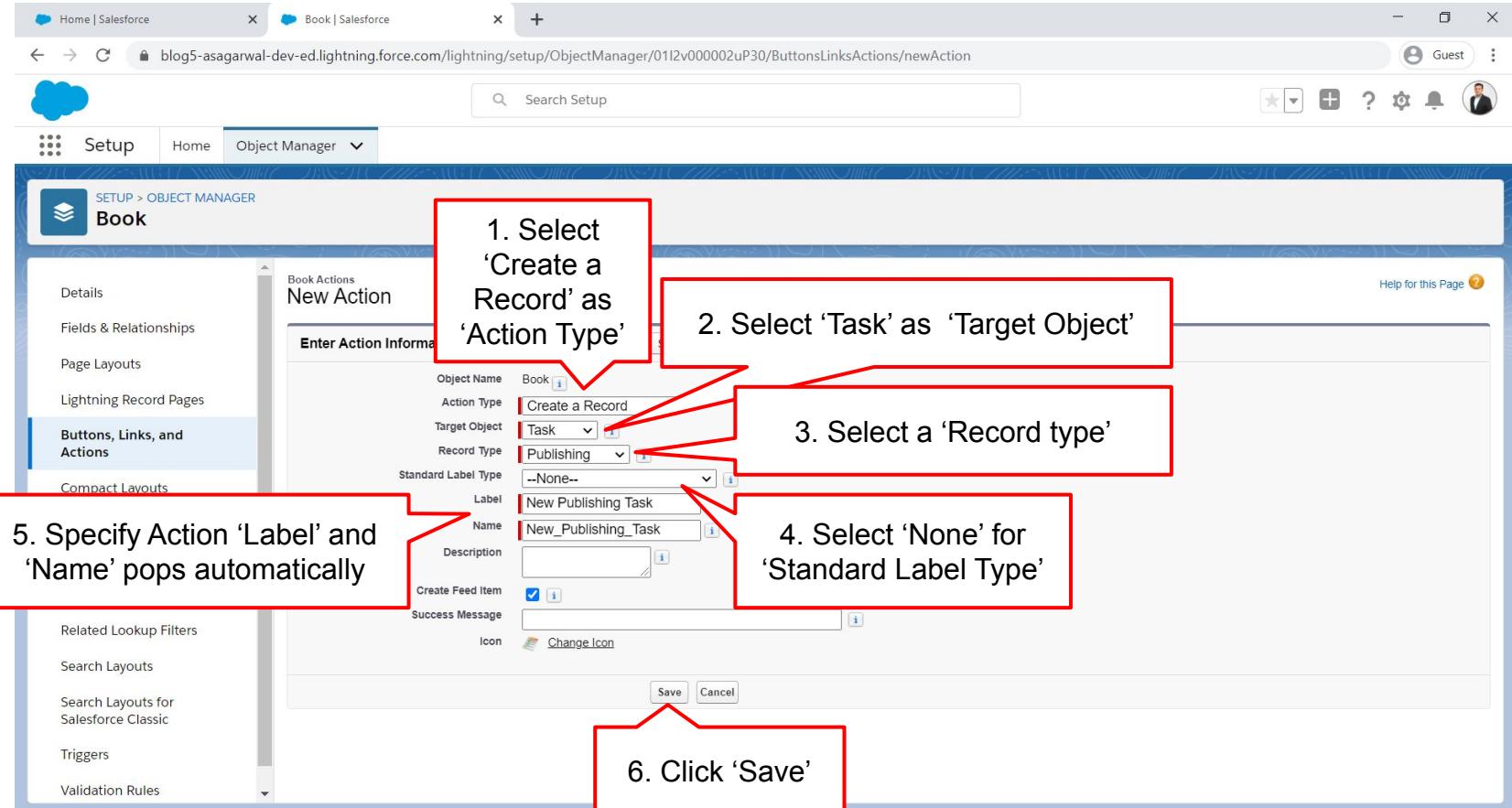
1. Navigate to the 'Buttons, Links and Actions' section of the Object where you wish to add the action

2. Click 'New Action'

The screenshot shows the Salesforce Object Manager for the 'Book' object. The left sidebar lists various object settings, and the main area shows the 'Buttons, Links, and Actions' section with 8 items. A red box highlights the 'Buttons, Links, and Actions' section, and a red arrow points to the 'New Action' button in the top right of the list table. The 'Buttons, Links, and Actions' section table has columns for Label, Name, Description, Type, Content Source, and Overridden.

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Accept	Accept		Standard page		
Books Tab	Tab		Standard page		
Clone	Clone		Standard page		
Delete	Delete		Standard page		
Edit	Edit		Standard page		
List	List		Standard page		
New	New		Standard page		
View	View		Standard page		

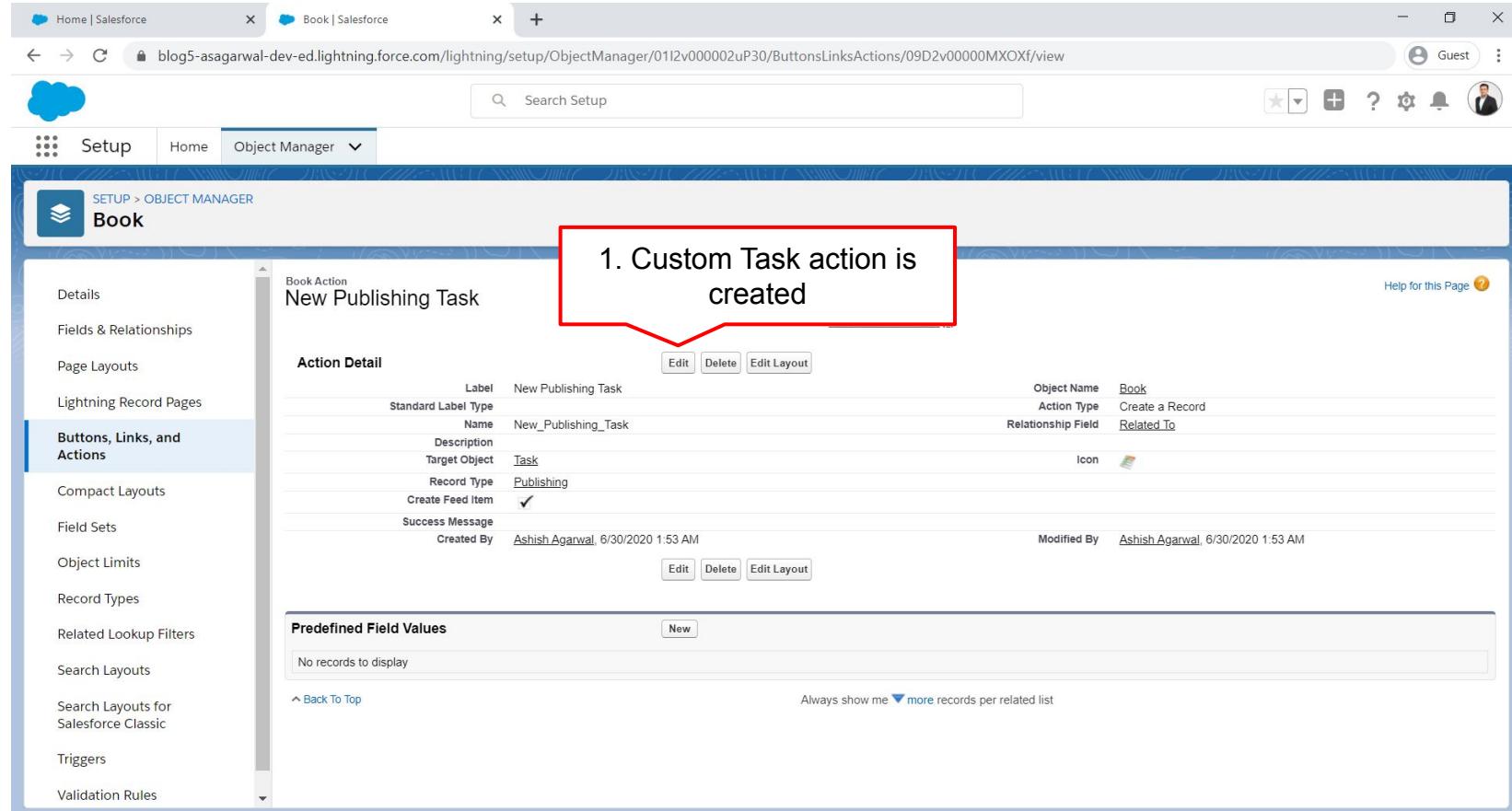
# Custom Actions - Declarative



The screenshot shows the Salesforce Setup interface for creating a custom action. The left sidebar shows the 'Buttons, Links, and Actions' section is selected. The main area is titled 'Book Actions New Action' and 'Enter Action Information'. The 'Action Type' is set to 'Create a Record' and the 'Target Object' is 'Task'. The 'Record Type' is 'Publishing'. The 'Standard Label Type' is set to 'None'. The 'Label' is 'New Publishing Task' and the 'Name' is 'New\_Publishing\_Task'. The 'Icon' is set to 'Change Icon'. The 'Save' and 'Cancel' buttons are at the bottom.

1. Select 'Create a Record' as 'Action Type'
2. Select 'Task' as 'Target Object'
3. Select a 'Record type'
4. Select 'None' for 'Standard Label Type'
5. Specify Action 'Label' and 'Name' pops automatically
6. Click 'Save'

# Custom Actions - Declarative



The screenshot shows the Salesforce Object Manager interface for the 'Book' object. The left sidebar lists various setup categories, with 'Buttons, Links, and Actions' selected. The main content area displays the 'Action Detail' for a 'New Publishing Task' action. A red box highlights the text '1. Custom Task action is created'.

**Action Detail**

Label	New Publishing Task	Object Name	Book
Standard Label Type		Action Type	Create a Record
Name	New_Publishing_Task	Relationship Field	Related_To
Description		Icon	
Target Object	Task		
Record Type	Publishing		
Create Feed Item	<input checked="" type="checkbox"/>		
Success Message		Modified By	Ashish Agarwal, 6/30/2020 1:53 AM
Created By	Ashish Agarwal, 6/30/2020 1:53 AM		

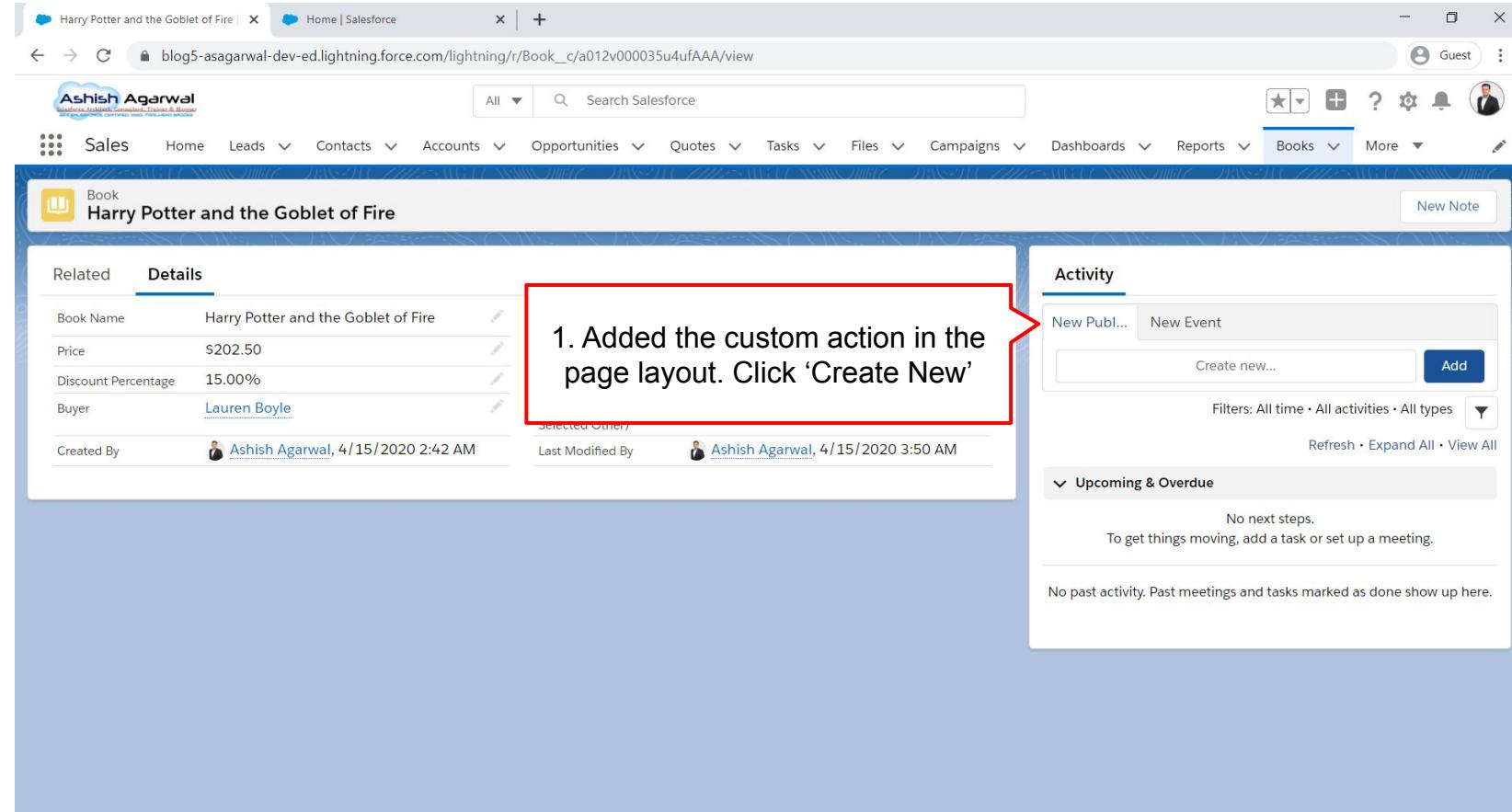
**Predefined Field Values**

No records to display

[New](#)

[Back To Top](#) Always show me [more](#) records per related list

# Custom Actions - Declarative



The screenshot shows a Salesforce Lightning page for a book record. The page title is "Harry Potter and the Goblet of Fire". The main content area displays the book's details: Name (Harry Potter and the Goblet of Fire), Price (\$202.50), Discount Percentage (15.00%), Buyer (Lauren Boyle), and Created By (Ashish Agarwal, 4/15/2020 2:42 AM). Below this, the "Activity" section is visible, showing a list of activities and a "Upcoming & Overdue" section. A red box highlights the text "1. Added the custom action in the page layout. Click 'Create New'".

1. Added the custom action in the page layout. Click 'Create New'

Activity

New Publ... New Event

Create new... Add

Filters: All time • All activities • All types

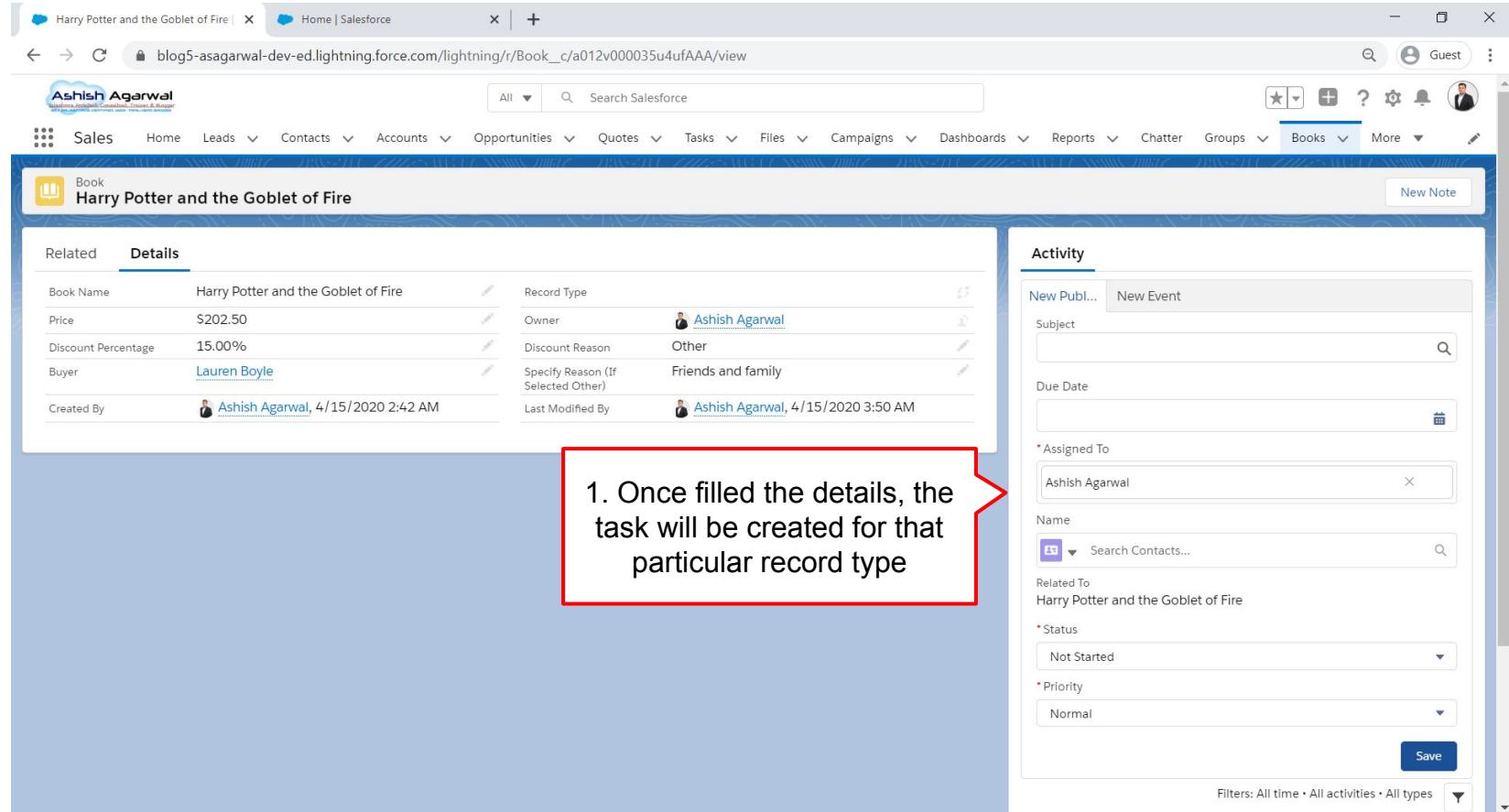
Refresh • Expand All • View All

Upcoming & Overdue

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

# Custom Actions - Declarative



1. Once filled the details, the task will be created for that particular record type

Activity

New Publ... New Event

Subject

Due Date

\* Assigned To

Ashish Agarwal

Name

Search Contacts...

Related To

Harry Potter and the Goblet of Fire

\* Status

Not Started

\* Priority

Normal

Save

Filters: All time • All activities • All types

# Custom Actions - Flow

Home | Salesforce | Flows | Salesforce | Flow Builder | Guest | Back | Help

blog5-asagarwal-dev-ed.lightning.force.com/builder\_platform\_interaction/flowBuilder.app?flowId=3012v0000000bAldAAE

Flow Builder | V6 Create or Update Contact - V1 | Active-Saved 2 days ago | Run | Debug | Deactivate | Save As | Save

Toolbox

Elements Manager

Interaction (3)

- Screen
- Action
- Subflow

Logic (3)

- Assignment
- Decision
- Loop

Data (4)

- Create Records
- Update Records
- Get Records
- Delete Records

Start → Screen (Welcome) → Screen (Create or update Contact) → Get Records (Find a Match)

Get Records (Find a Match) → Decision (Update or Create?)

Decision (Update or Create?) → Create Records (Create Contact)

Create Records (Create Contact) → Screen (afterCreate)

Decision (Update or Create?) → Assignment (Set Contact ID)

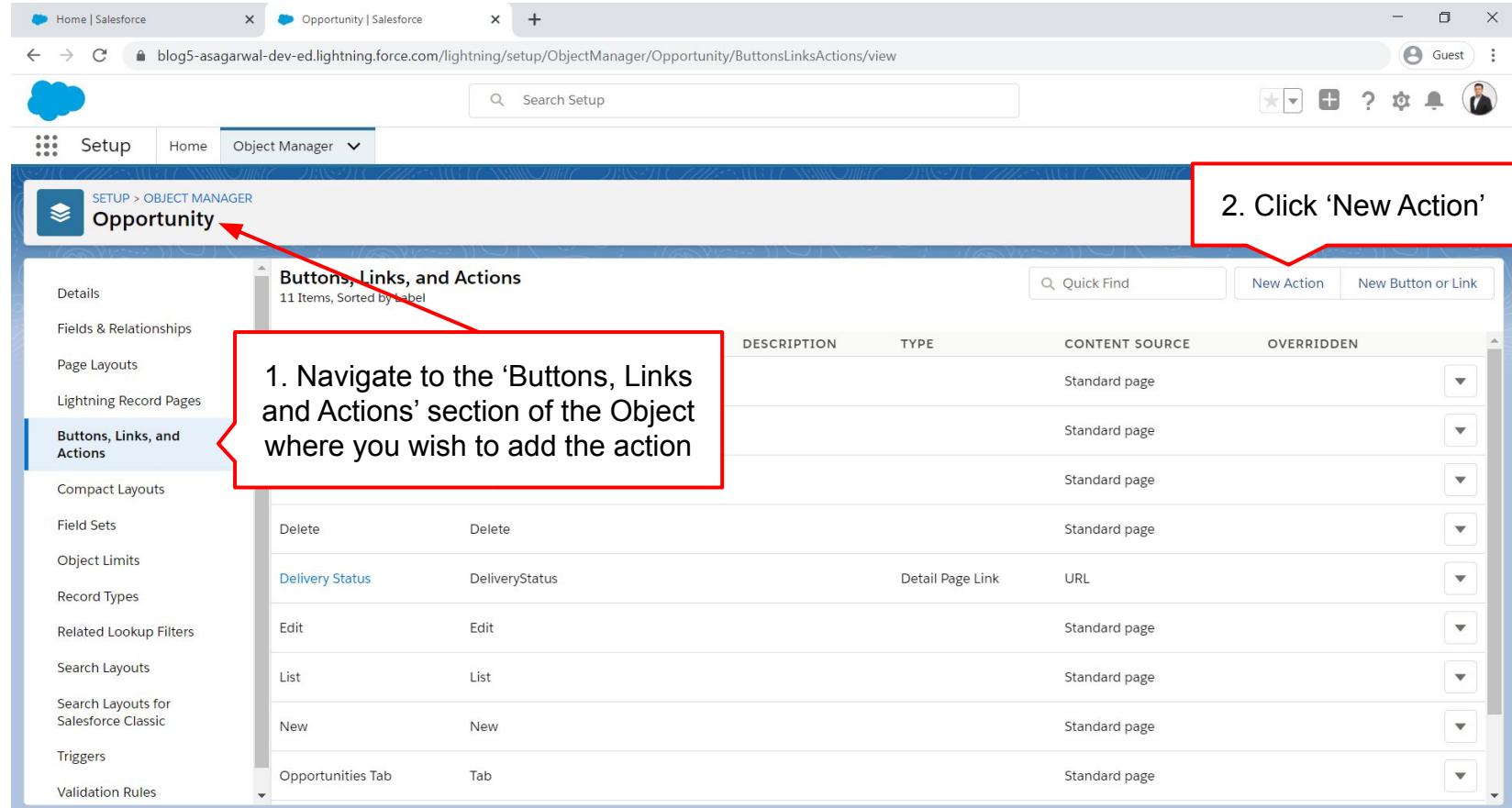
Assignment (Set Contact ID) → Update Records (Update Contact)

Update Records (Update Contact) → Screen (afterUpdate)

Now let's create a custom action to trigger a flow (only Screen Flows are supported for Actions). This is the screenshot of a flow defined in the System

Get more on the AppExchange

# Custom Actions - Flow

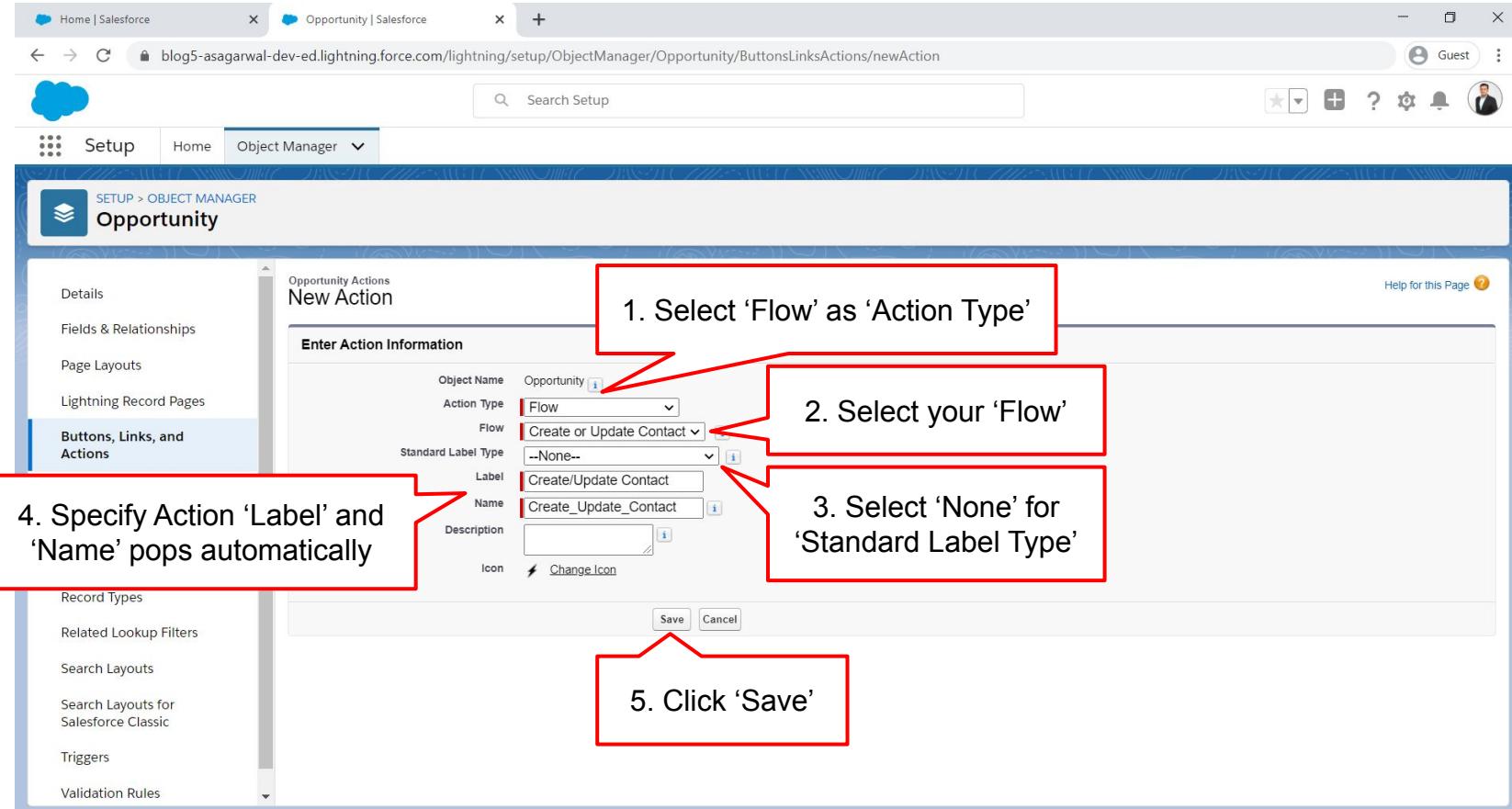


1. Navigate to the 'Buttons, Links and Actions' section of the Object where you wish to add the action

2. Click 'New Action'

DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Standard page			
Standard page			
Standard page			
Delete	Delete	Standard page	
Delivery Status	DeliveryStatus	Detail Page Link	URL
Edit	Edit	Standard page	
List	List	Standard page	
New	New	Standard page	
Opportunities Tab	Tab	Standard page	

# Custom Actions - Flow



The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. Under the 'Opportunity' object, the 'Buttons, Links, and Actions' section is highlighted. A new action is being created, titled 'Opportunity Actions New Action'. The 'Action Type' is set to 'Flow', and the 'Flow' dropdown shows 'Create or Update Contact'. The 'Standard Label Type' is set to '--None--'. The 'Label' field contains 'Create/Update Contact' and the 'Name' field contains 'Create\_Update\_Contact'. A red box highlights the 'Action Type' dropdown with the instruction '1. Select 'Flow' as 'Action Type''. Another red box highlights the 'Flow' dropdown with the instruction '2. Select your 'Flow''. A third red box highlights the 'Standard Label Type' dropdown with the instruction '3. Select 'None' for 'Standard Label Type''. A fourth red box highlights the 'Label' and 'Name' fields with the instruction '4. Specify Action 'Label' and 'Name' pops automatically'. A fifth red box highlights the 'Save' button with the instruction '5. Click 'Save''. The 'Save' button is located at the bottom right of the form.

1. Select 'Flow' as 'Action Type'

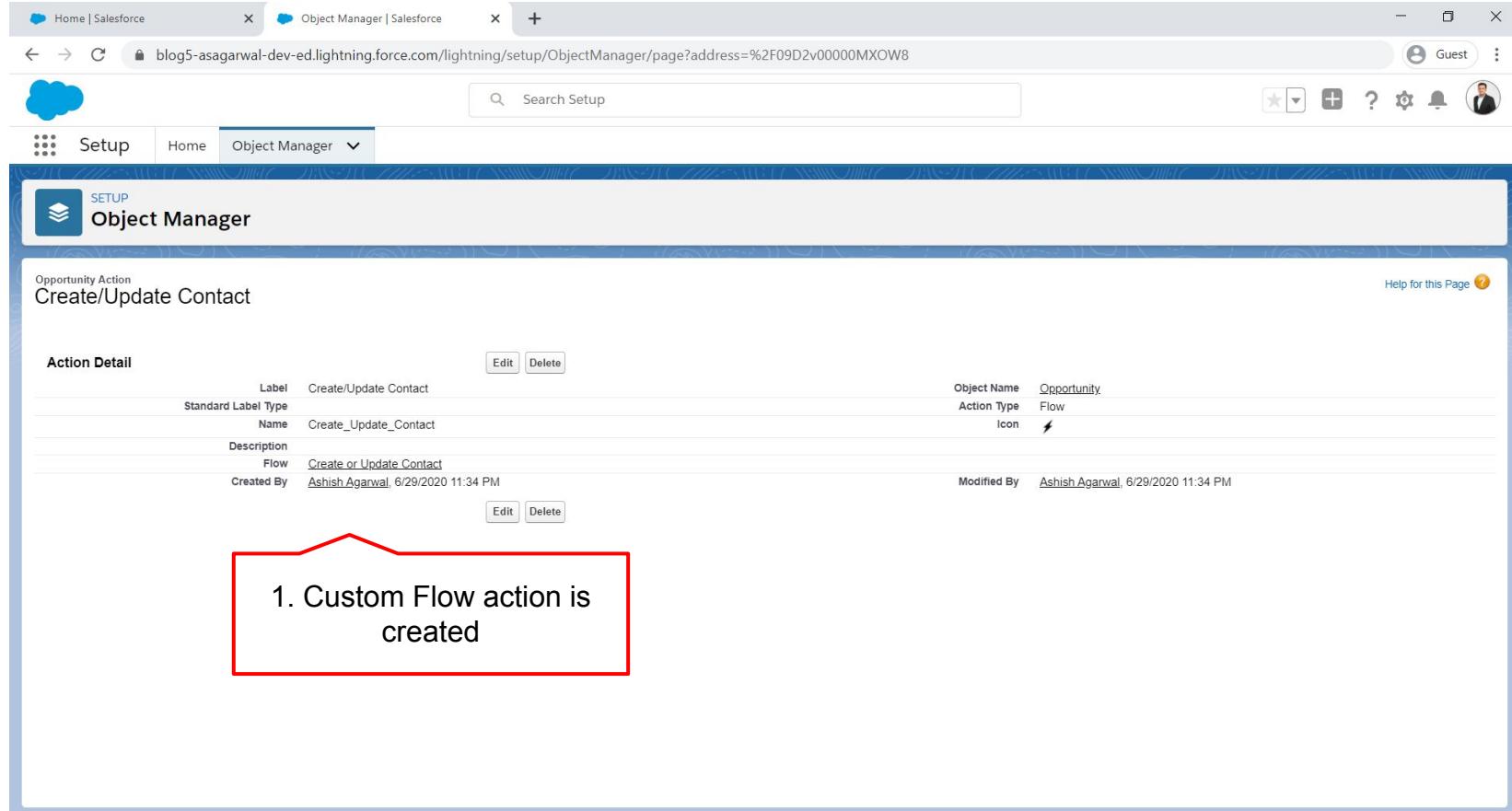
2. Select your 'Flow'

3. Select 'None' for 'Standard Label Type'

4. Specify Action 'Label' and 'Name' pops automatically

5. Click 'Save'

# Custom Actions - Flow



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Home | Salesforce', 'Object Manager | Salesforce', and a search bar. The main header is 'Object Manager' with a 'Search Setup' bar. The page title is 'Opportunity Action Create/Update Contact'. The 'Action Detail' section displays the following information:

Action Detail		Object Name	
Label	Create/Update Contact	Object Name	Opportunity
Standard Label Type	Create/Update Contact	Action Type	Flow
Name	Create_Update_Contact	Icon	⚡
Description			
Flow	Create or Update Contact		
Created By	Ashish Agarwal, 6/29/2020 11:34 PM	Modified By	Ashish Agarwal, 6/29/2020 11:34 PM

Below the table, a red box highlights the text: '1. Custom Flow action is created'.

# Custom Actions - Flow

2. Click 'Save'

1. Navigate to the page layout where you want to display the custom action and drag and drop the custom action to the 'Salesforce Mobile and Lightning Experience Actions'

Opportunity Sample

Highlights Panel

Customize the highlights panel for this page layout...

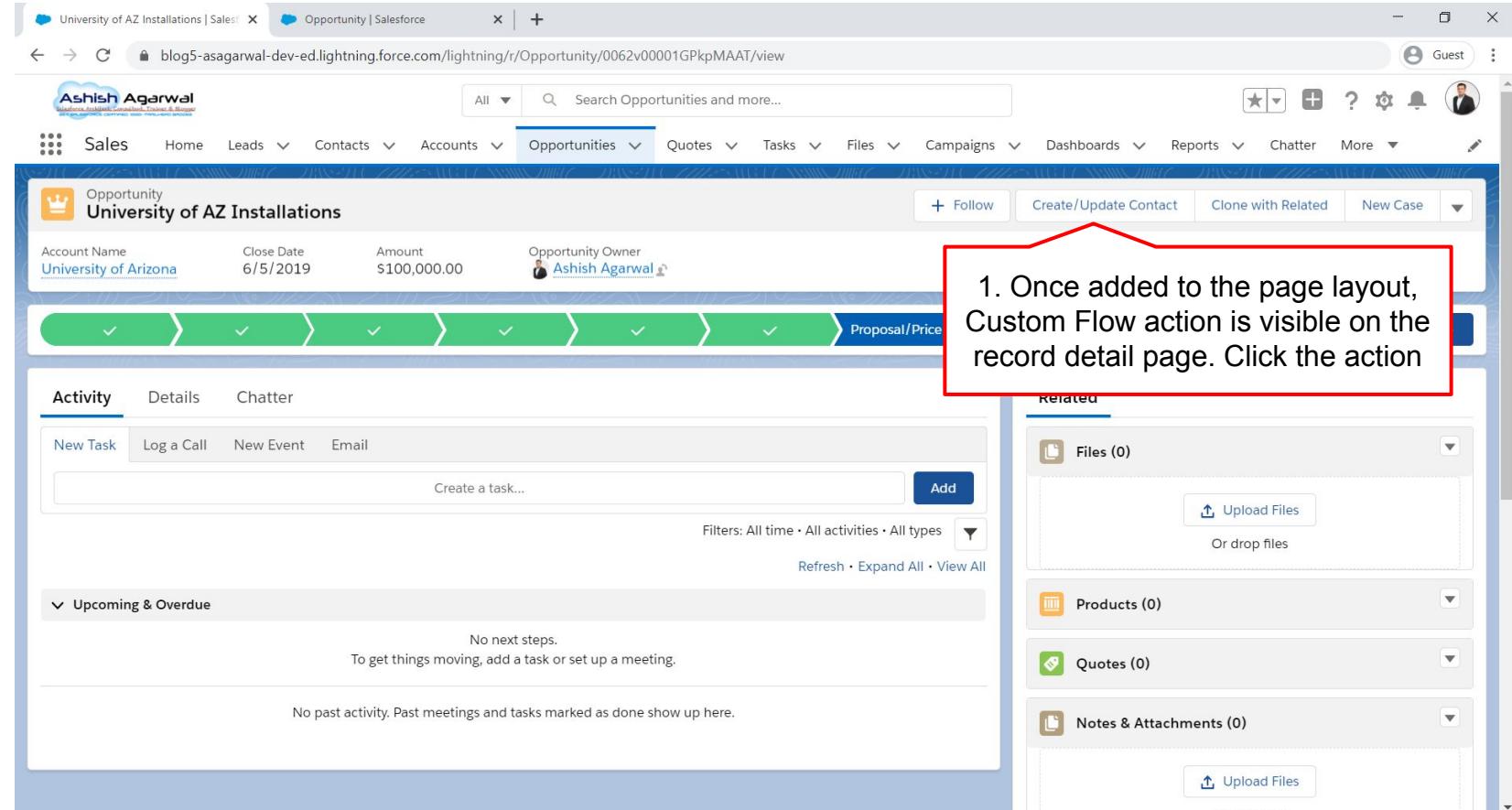
Quick Actions in the Salesforce Classic Publisher

Post File New Task Log a Call

Salesforce Mobile and Lightning Experience Actions

Create/Update Contact Clone with Related New Case Post File New Task Log a Call New Note New Event Link Poll Question Email Change Record Type Clone Submit for Approval Delete Edit Change Owner Sharing

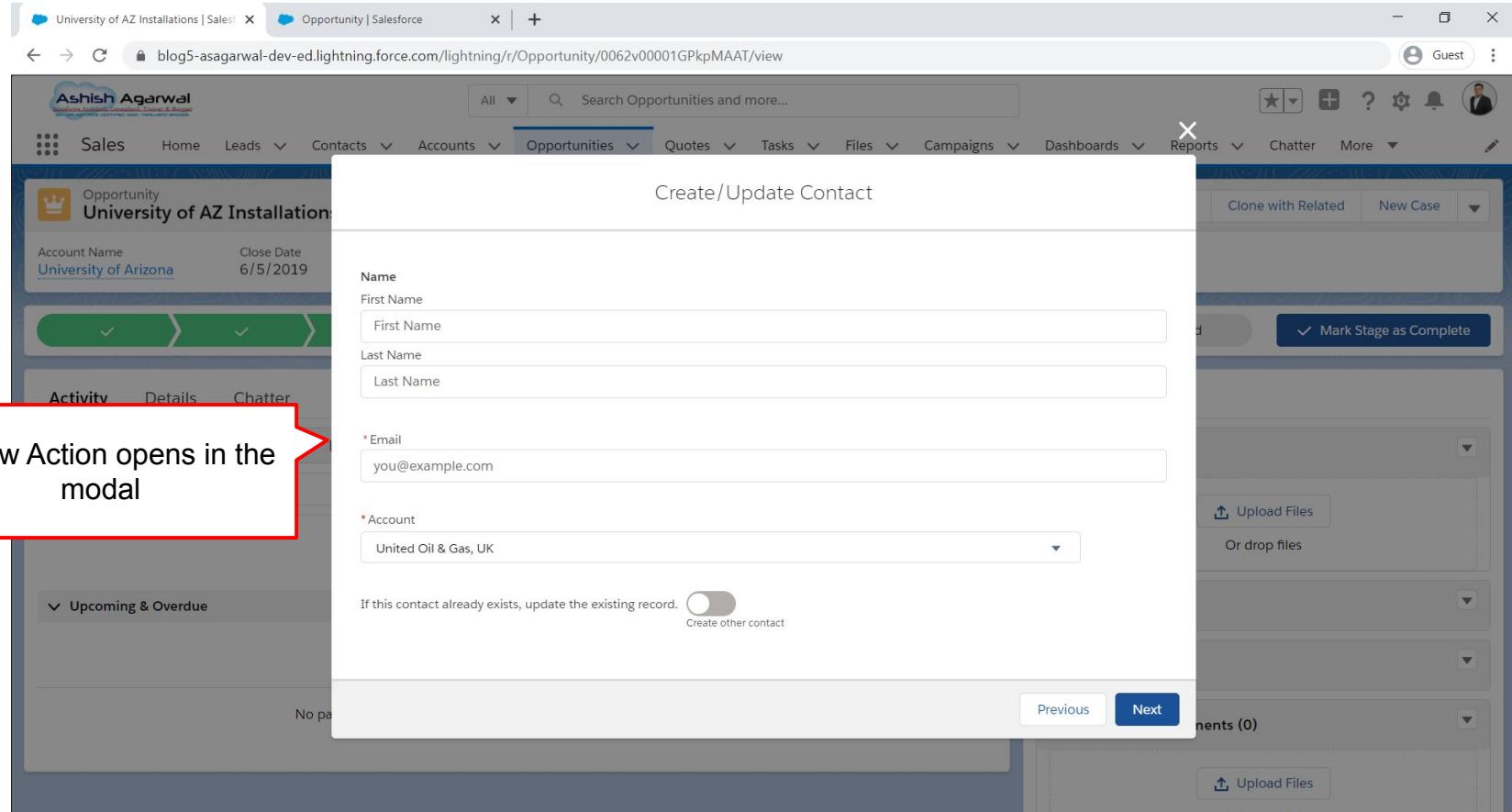
# Custom Actions - Flow



The screenshot shows a Salesforce Opportunity record for 'University of AZ Installations'. The page includes a navigation bar with tabs like Sales, Home, Leads, Contacts, Accounts, Opportunities (selected), Quotes, Tasks, Files, Campaigns, Dashboards, Reports, Chatter, and More. A search bar at the top says 'Search Opportunities and more...'. Below the navigation is a main content area for the Opportunity record, which includes fields for Account Name (University of Arizona), Close Date (6/5/2019), Amount (\$100,000.00), and Opportunity Owner (Ashish Agarwal). A progress bar at the bottom indicates steps from 'New' to 'Proposal/Price'. To the right of the main content, there's a 'Related' section with sections for Files (0), Products (0), Quotes (0), and Notes & Attachments (0), each with an 'Upload Files' button. A red box highlights the 'Proposal/Price' step in the progress bar, with the following text overlaid:

1. Once added to the page layout, Custom Flow action is visible on the record detail page. Click the action

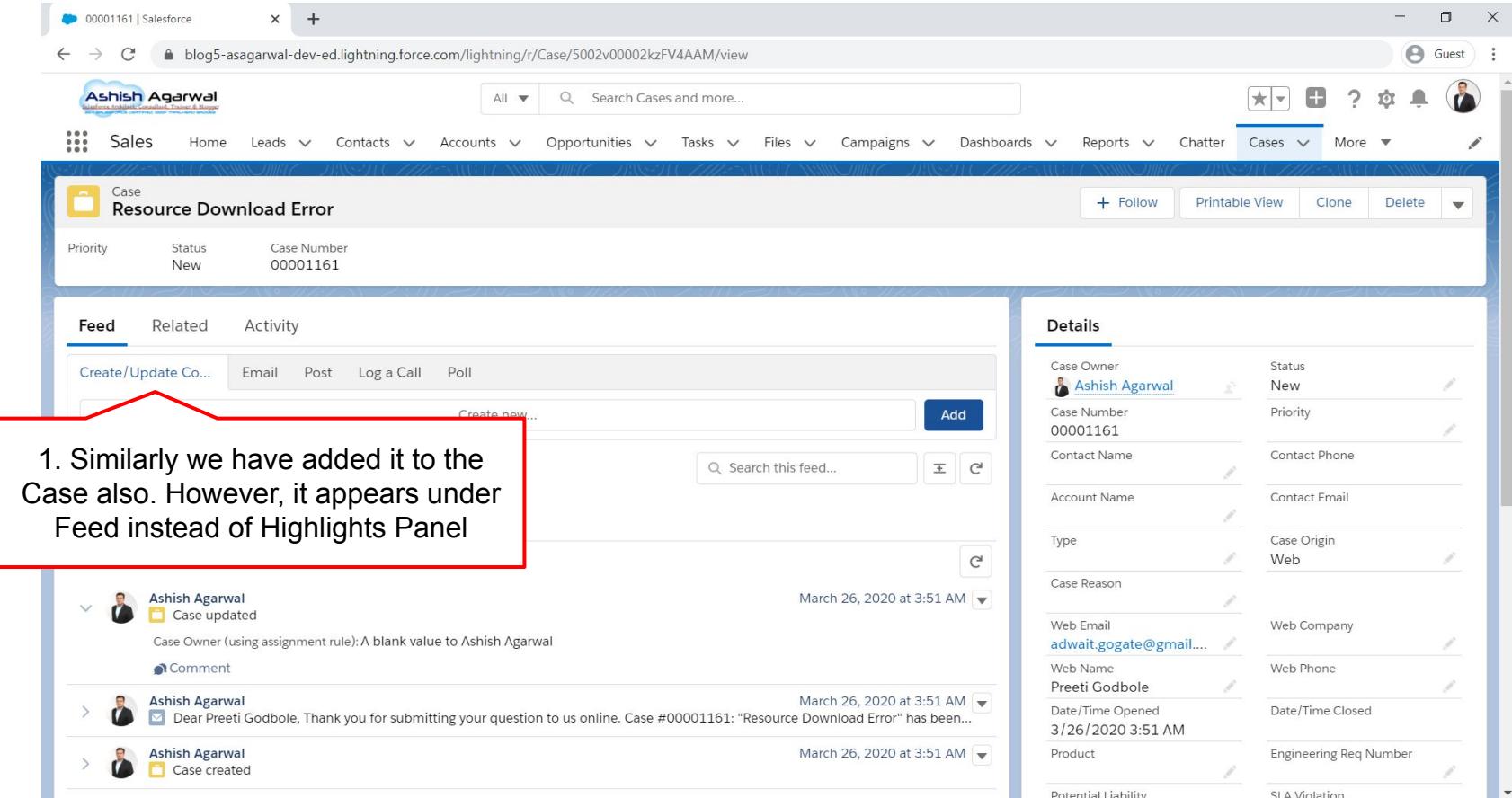
# Custom Actions - Flow



The screenshot shows a Salesforce interface for an Opportunity record. The main window displays the Opportunity details for 'University of AZ Installation'. A modal window titled 'Create/Update Contact' is open in the center. The modal contains fields for Name (First Name and Last Name), Email (with 'you@example.com' entered), and Account (selected as 'United Oil & Gas, UK'). A toggle switch at the bottom left of the modal is set to 'Update existing record'. The 'Next' button is visible at the bottom right of the modal. The background shows the standard Salesforce navigation bar and other tabs like Sales, Home, Leads, Contacts, Accounts, Opportunities, Quotes, Tasks, Files, Campaigns, Dashboards, Reports, Chatter, and More.

1. Flow Action opens in the modal

# Custom Actions - Flow



00001161 | Salesforce +

blog5-asagarwal-dev-ed.lightning.force.com/lightning/r/Case/5002v00002kzFV4AM/view

**Case** Resource Download Error

Priority: New, Status: New, Case Number: 00001161

**Feed** **Related** **Activity**

Create/Update Co... Email Post Log a Call Poll

1. Similarly we have added it to the Case also. However, it appears under Feed instead of Highlights Panel

**Details**

Case Owner: <a href="#">Ashish Agarwal</a>	Status: New
Case Number: 00001161	Priority: <input type="text"/>
Contact Name: <input type="text"/>	Contact Phone: <input type="text"/>
Account Name: <input type="text"/>	Contact Email: <input type="text"/>
Type: <input type="text"/>	Case Origin: Web
Case Reason: <input type="text"/>	Web Email: <a href="mailto:adwait.gogate@gmail.com">adwait.gogate@gmail.com</a>
Web Company: <input type="text"/>	Web Name: Preeti Godbole
Web Phone: <input type="text"/>	Date/Time Opened: March 26, 2020 3:51 AM
Date/Time Closed: <input type="text"/>	Product: <input type="text"/>
Engineering Req Number: <input type="text"/>	Potential Liability: <input type="text"/>
SLA Violation: <input type="text"/>	

March 26, 2020 at 3:51 AM

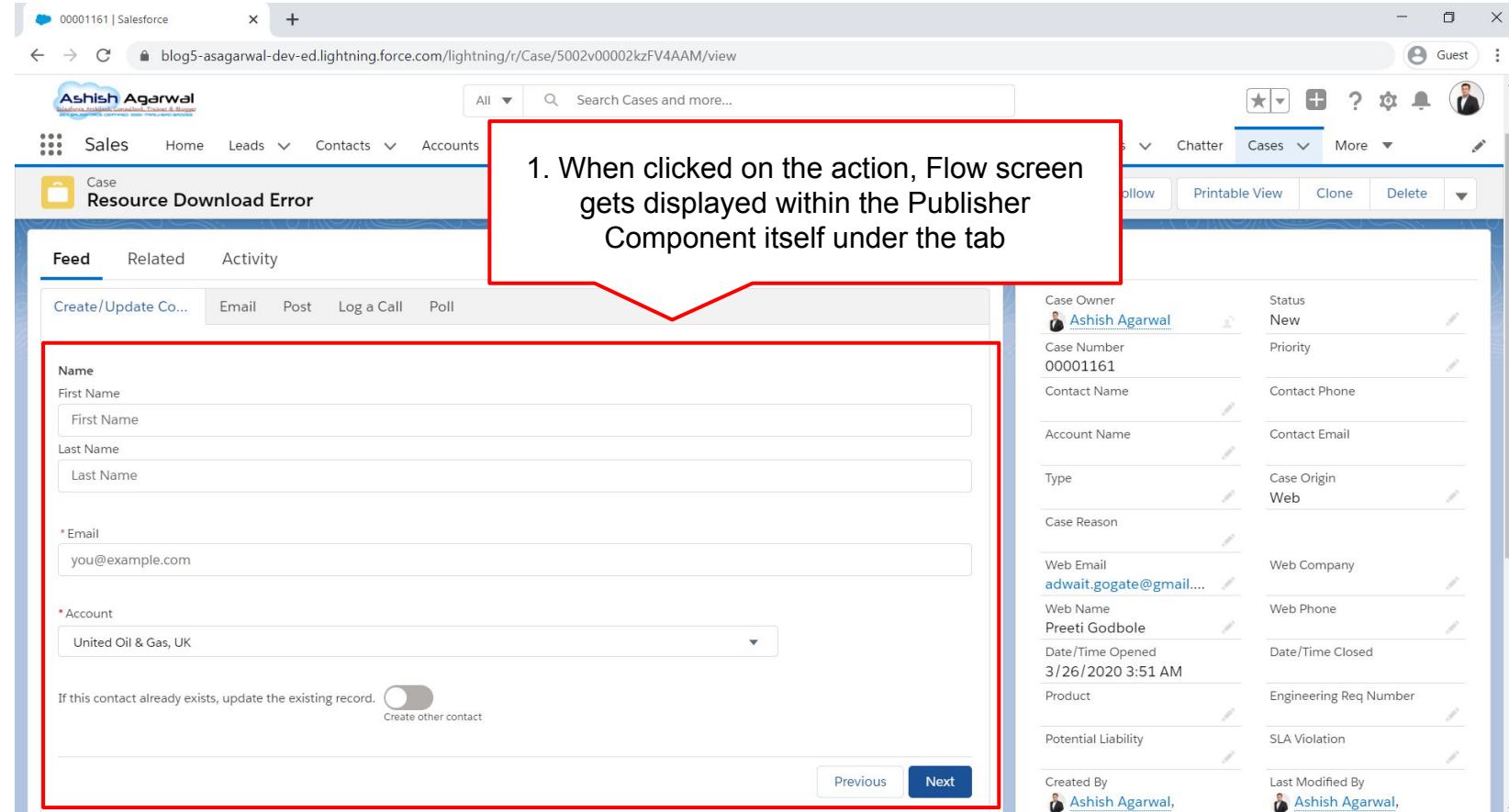
Ashish Agarwal Case updated Case Owner (using assignment rule): A blank value to Ashish Agarwal

Ashish Agarwal Comment

Ashish Agarwal Dear Preeti Godbole, Thank you for submitting your question to us online. Case #00001161: "Resource Download Error" has been...

Ashish Agarwal Case created

# Custom Actions - Flow



00001161 | Salesforce +

← → C lock blog5-asagarwal-dev-ed.lightning.force.com/lightning/r/Case/5002v00002kzFV4AM/view

Guest

Ashish Agarwal

Sales Home Leads Contacts Accounts

Case Resource Download Error

Feed Related Activity

Create/Update Co... Email Post Log a Call Poll

1. When clicked on the action, Flow screen gets displayed within the Publisher Component itself under the tab

**Case Owner** Ashish Agarwal **Status** New

**Case Number** 00001161 **Priority**

**Contact Name** **Account Name** **Contact Phone** **Contact Email**

**Type** **Case Origin** Web

**Case Reason**

**Web Email** adwait.gogate@gmail.... **Web Company**

**Web Name** Preeti Godbole **Web Phone**

**Date/Time Opened** 3/26/2020 3:51 AM **Date/Time Closed**

**Product** **Engineering Req Number**

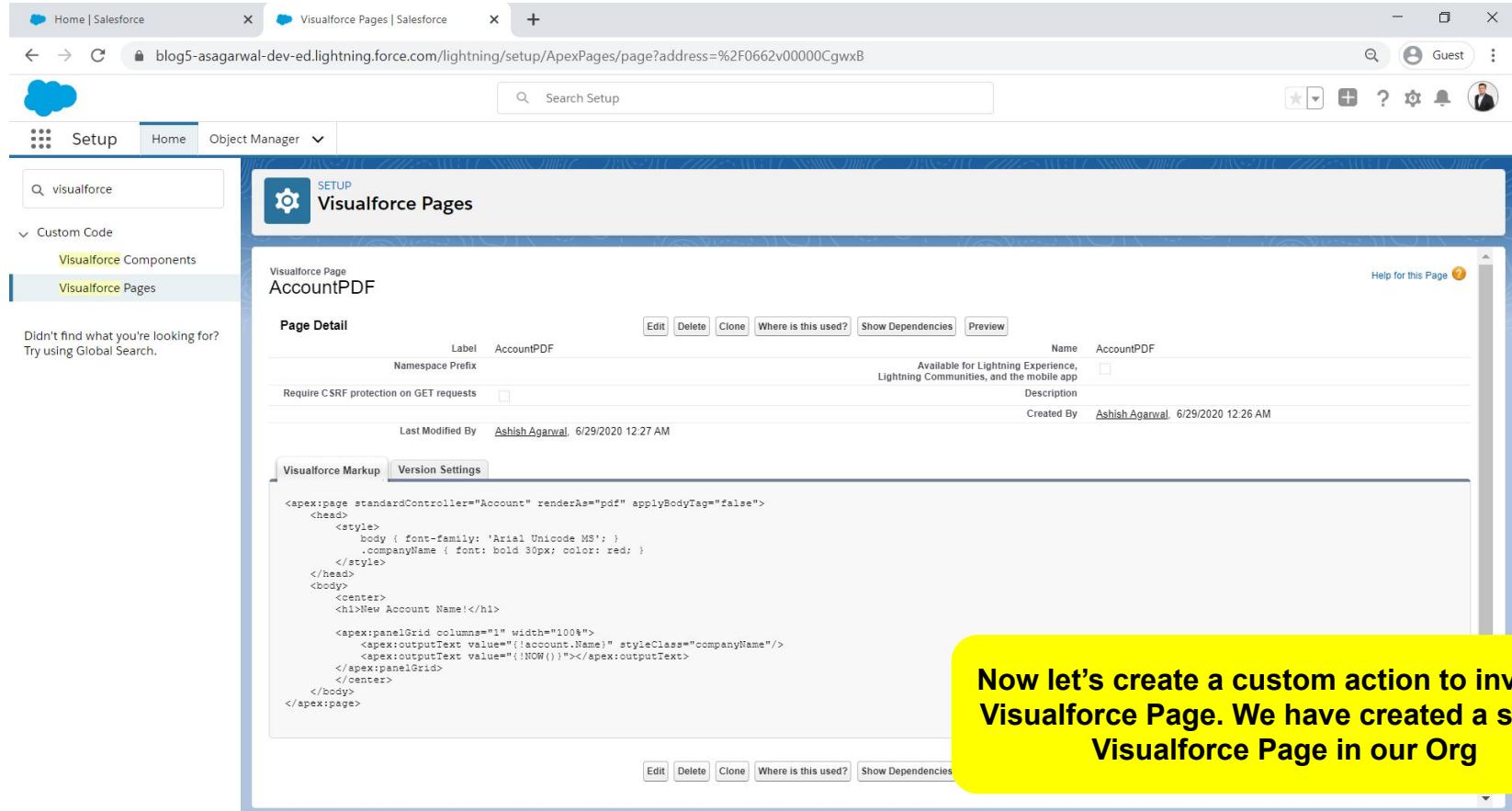
**Potential Liability** **SLA Violation**

**Created By** Ashish Agarwal **Last Modified By** Ashish Agarwal

If this contact already exists, update the existing record.  Create other contact

Previous Next

# Custom Actions - Visualforce Page



Now let's create a custom action to invoke a Visualforce Page. We have created a sample Visualforce Page in our Org

Home | Salesforce Visualforce Pages | Salesforce

blog5-asagarwal-dev-ed.lightning.force.com/lightning/setup/ApexPages/page?address=%2F0662v00000CgwxB

Setup Home Object Manager

visualforce

Custom Code

Visualforce Components

Visualforce Pages

Didn't find what you're looking for? Try using Global Search.

Visualforce Page AccountPDF

Page Detail

Label AccountPDF

Namespace Prefix

Require CSRF protection on GET requests

Available for Lightning Experience, Lightning Communities, and the mobile app

Name AccountPDF

Description

Created By Ashish Agarwal 6/29/2020 12:26 AM

Last Modified By Ashish Agarwal 6/29/2020 12:27 AM

Visualforce Markup

```
<apex:page standardController="Account" renderAs="pdf" applyBodyTag="false">
    <head>
        <style>
            body { font-family: 'Arial Unicode MS'; }
            .companyName { font: bold 30px; color: red; }
        </style>
    </head>
    <body>
        <center>
            <h1>New Account Name!</h1>
            <apex:panelGrid columns="1" width="100%">
                <apex:outputText value="{!account.Name}" styleClass="companyName"/>
                <apex:outputText value="{!NOW()}"></apex:outputText>
            </apex:panelGrid>
        </center>
    </body>
</apex:page>
```

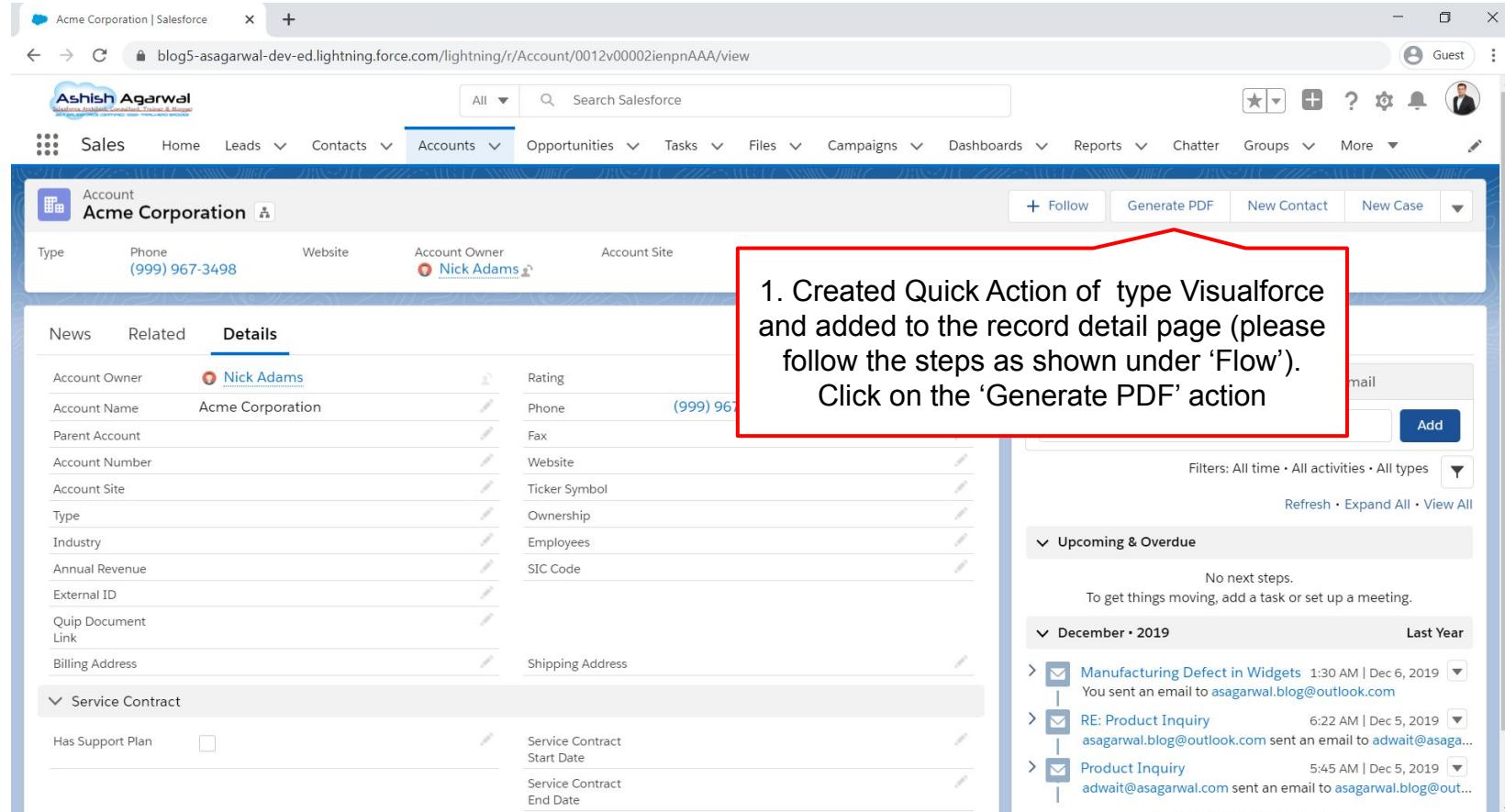
Edit Delete Clone Where is this used? Show Dependencies Preview

Search Setup

Guest

Visit asagarwal.com for useful tips and tricks on Salesforce

# Custom Actions - Visualforce Page



1. Created Quick Action of type Visualforce and added to the record detail page (please follow the steps as shown under 'Flow'). Click on the 'Generate PDF' action

Acme Corporation | Salesforce Guest

blog5-asagarwal-dev-ed.lightning.force.com/lightning/r/Account/0012v00002ienpnAAA/view

Search Salesforce

Sales Home Leads Contacts Accounts Opportunities Tasks Files Campaigns Dashboards Reports Chatter Groups More

Account Acme Corporation

Type Phone (999) 967-3498 Website Account Owner Nick Adams

News Related Details

Account Owner Nick Adams Account Name Acme Corporation Parent Account Account Number Account Site Type Industry Annual Revenue External ID Quip Document Link Billing Address Service Contract Has Support Plan

Rating Phone (999) 967-3498 Fax Website Ticker Symbol Ownership Employees SIC Code

Shipping Address

Service Contract Start Date Service Contract End Date

Follow Generate PDF New Contact New Case

Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue No next steps. To get things moving, add a task or set up a meeting.

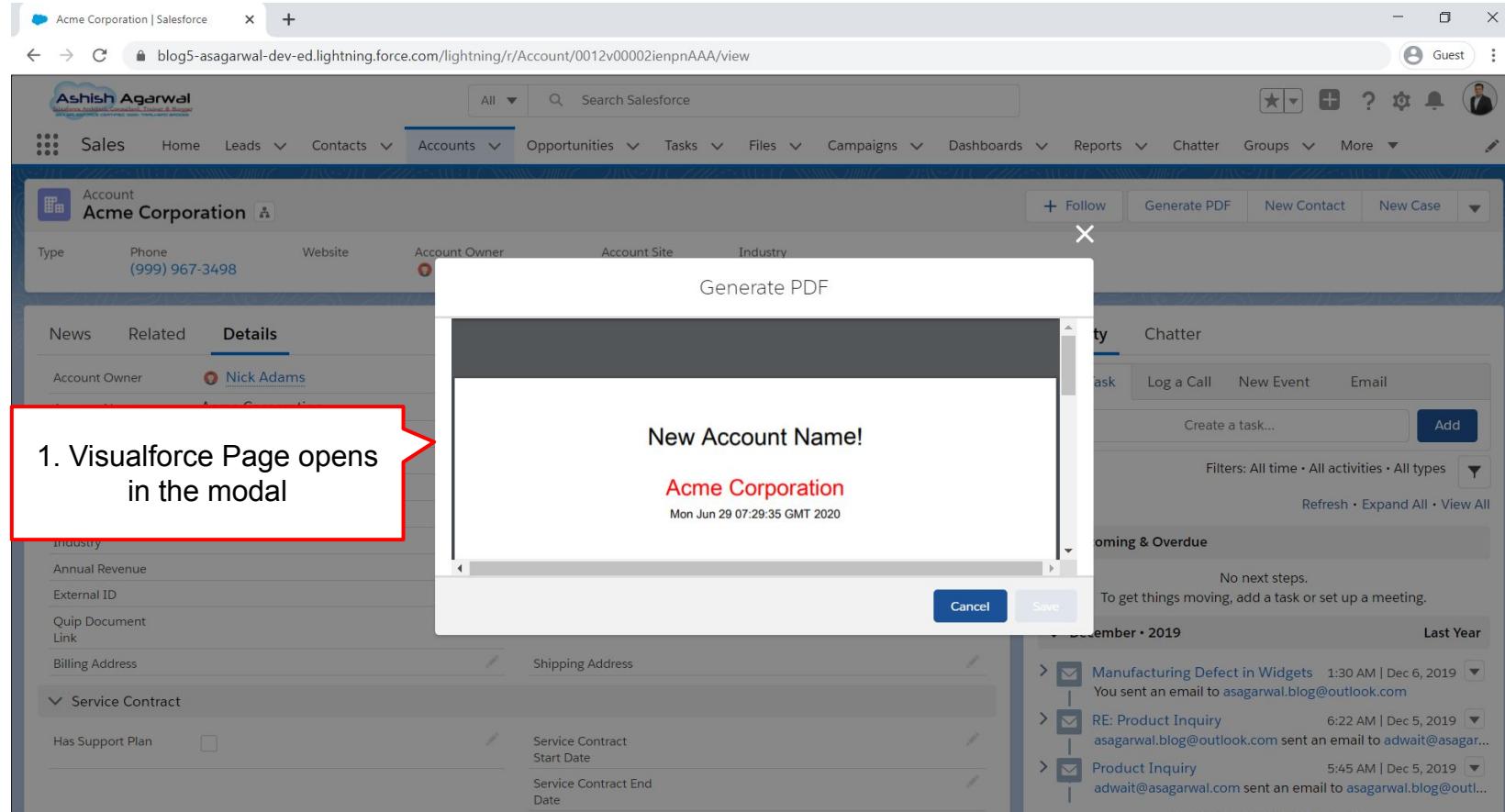
December • 2019 Last Year

> Manufacturing Defect in Widgets 1:30 AM | Dec 6, 2019 You sent an email to asagarwal.blog@outlook.com

> RE: Product Inquiry 6:22 AM | Dec 5, 2019 asagarwal.blog@outlook.com sent an email to adwait@asaga...

> Product Inquiry 5:45 AM | Dec 5, 2019 adwait@asagarwal.com sent an email to asagarwal.blog@out...

# Custom Actions - Visualforce Page



1. Visualforce Page opens in the modal

Generate PDF

New Account Name!

Acme Corporation

Mon Jun 29 07:29:35 GMT 2020

Cancel Save

Shipping Address

Service Contract Start Date

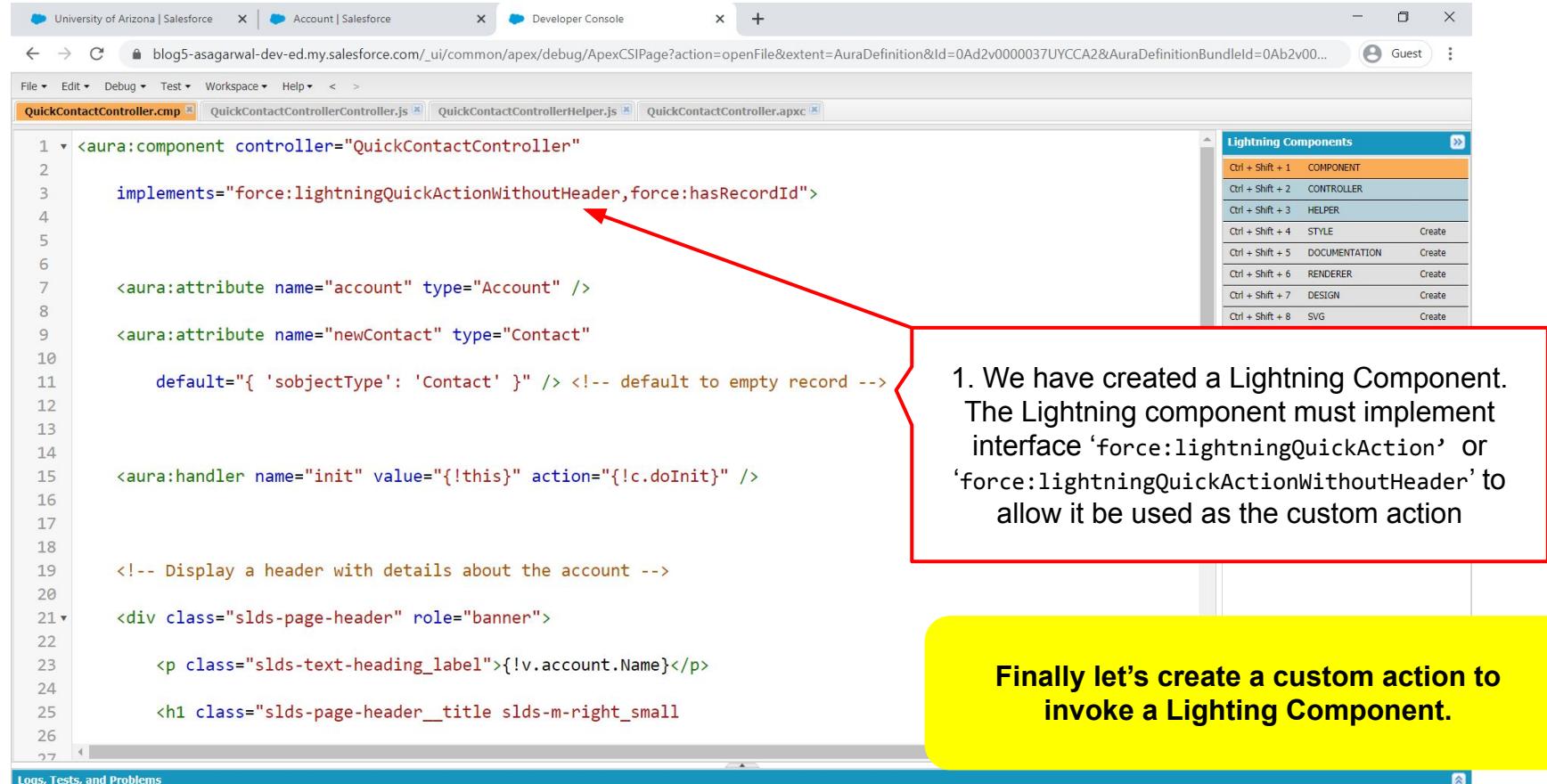
Service Contract End Date

Manufacturing Defect in Widgets 1:30 AM | Dec 6, 2019  
You sent an email to [asagarwal.blog@outlook.com](mailto:asagarwal.blog@outlook.com)

RE: Product Inquiry 6:22 AM | Dec 5, 2019  
[asagarwal.blog@outlook.com](mailto:asagarwal.blog@outlook.com) sent an email to [adwait@asagarwal.com](mailto:adwait@asagarwal.com)

Product Inquiry 5:45 AM | Dec 5, 2019  
[adwait@asagarwal.com](mailto:adwait@asagarwal.com) sent an email to [asagarwal.blog@outlook.com](mailto:asagarwal.blog@outlook.com)

# Custom Actions - Lightning Component



```
1 <aura:component controller="QuickContactController"
2
3     implements="force:lightningQuickActionWithoutHeader,force:hasRecordId">
4
5
6     <aura:attribute name="account" type="Account" />
7
8     <aura:attribute name="newContact" type="Contact"
9
10        default="{ 'sobjectType': 'Contact' }" /> <!-- default to empty record -->
11
12
13
14
15     <aura:handler name="init" value="{!this}" action=" {!c.doInit}" />
16
17
18
19     <!-- Display a header with details about the account -->
20
21     <div class="slds-page-header" role="banner">
22
23         <p class="slds-text-heading_label">{!v.account.Name}</p>
24
25         <h1 class="slds-page-header__title slds-m-right_small">
```

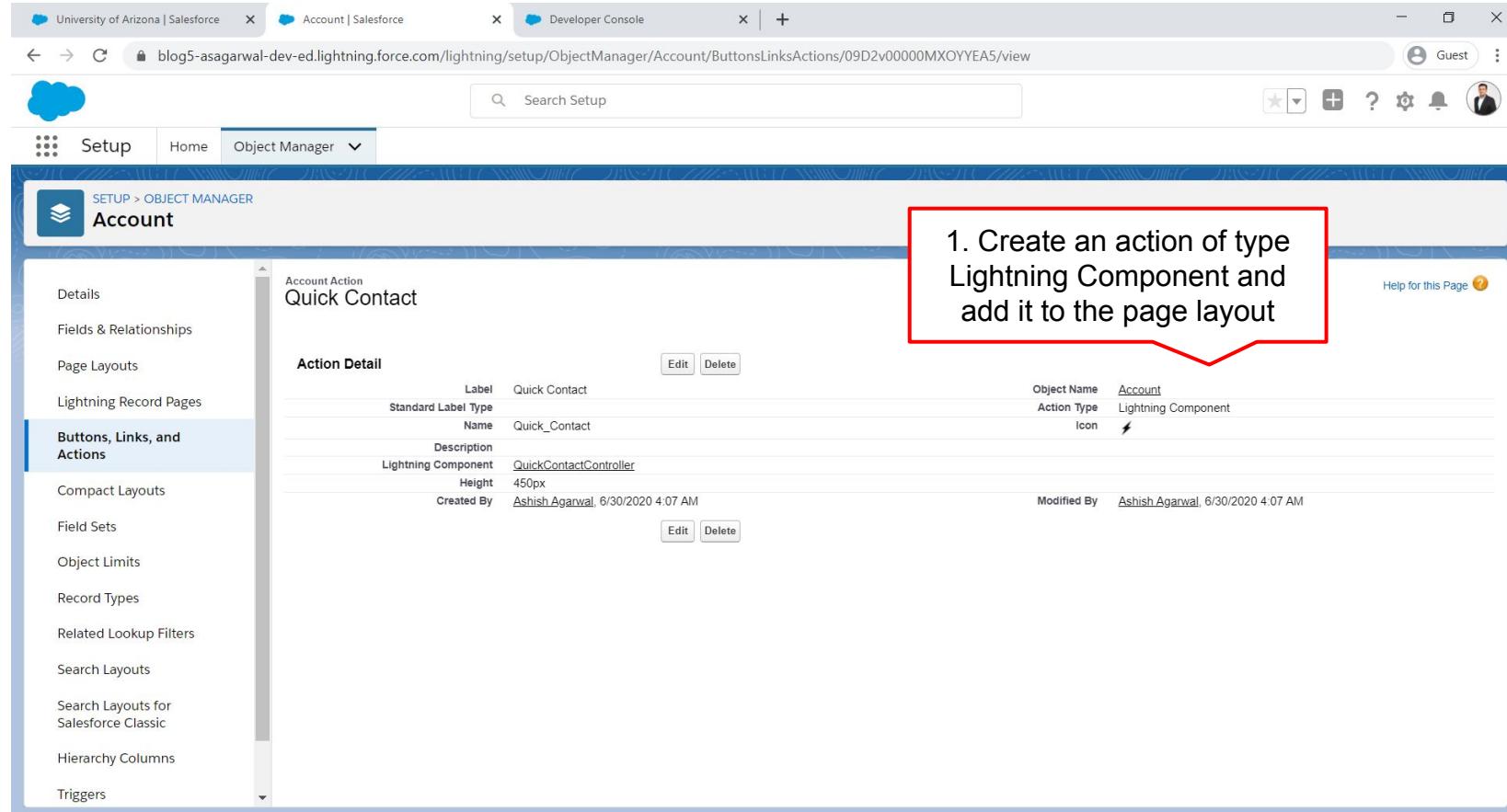
Lightning Components

Ctrl + Shift + 1	COMPONENT
Ctrl + Shift + 2	CONTROLLER
Ctrl + Shift + 3	HELPER
Ctrl + Shift + 4	STYLE
Ctrl + Shift + 5	DOCUMENTATION
Ctrl + Shift + 6	RENDERER
Ctrl + Shift + 7	DESIGN
Ctrl + Shift + 8	SVG

1. We have created a Lightning Component. The Lightning component must implement interface 'force:lightningQuickAction' or 'force:lightningQuickActionWithoutHeader' to allow it be used as the custom action

Finally let's create a custom action to invoke a Lightning Component.

# Custom Actions - Lightning Component



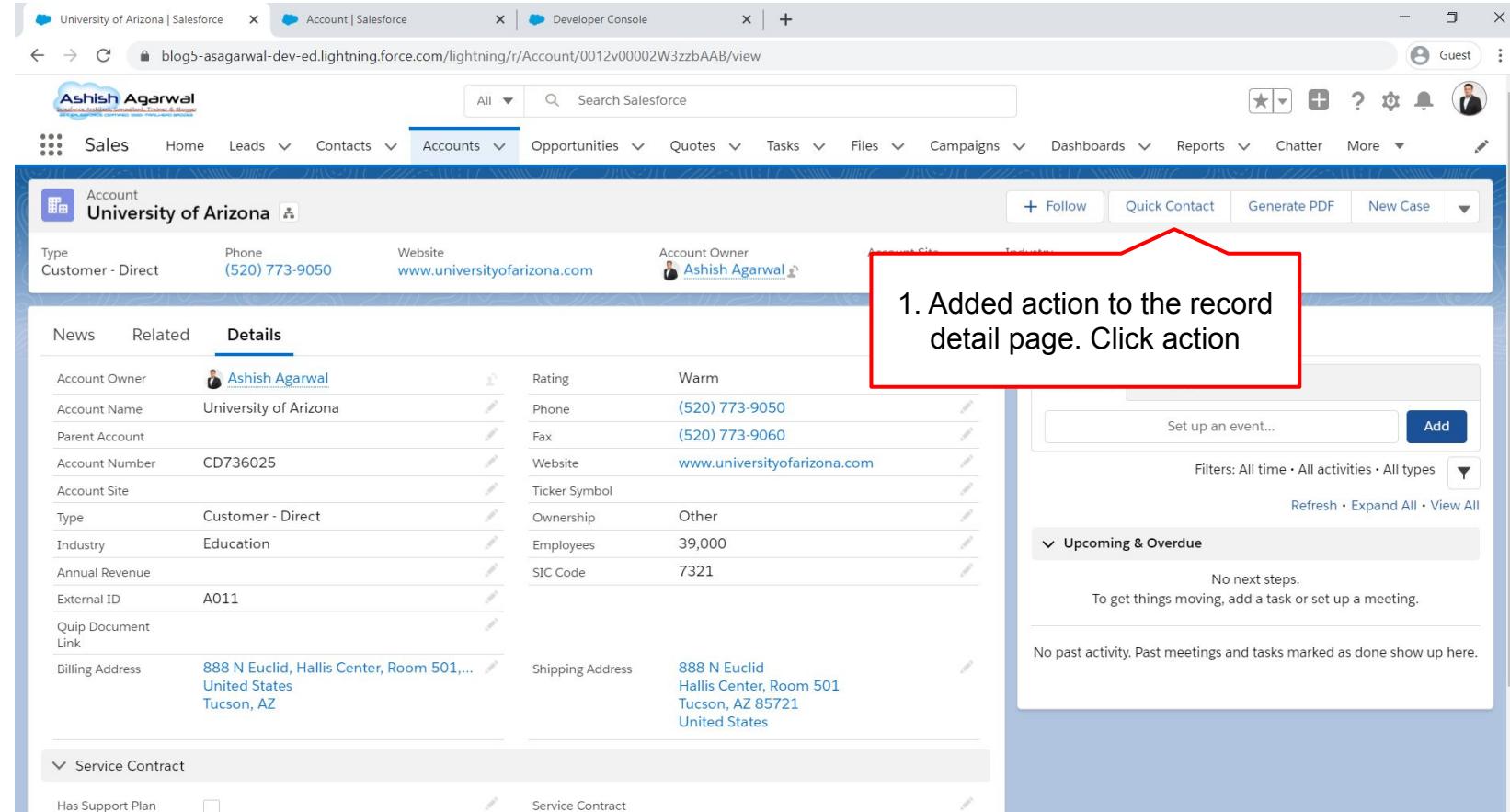
The screenshot shows the Salesforce Setup interface with the following details:

- Setup** tab is selected.
- Object Manager** is selected under the **Object Manager** dropdown.
- Account** object is selected.
- Buttons, Links, and Actions** section is currently selected in the sidebar.
- Quick Contact** action is being edited.
- Action Detail** table:
  - Label**: Quick Contact
  - Standard Label Type**: Name
  - Name**: Quick\_Contact
  - Description**: Lightning Component
  - Lightning Component**: [QuickContactController](#)
  - Height**: 450px
  - Created By**: Ashish Agarwal, 6/30/2020 4:07 AM
  - Modified By**: Ashish Agarwal, 6/30/2020 4:07 AM
- Object Name**: Account
- Action Type**: Lightning Component
- Icon**: 

A red box highlights the following text:

1. Create an action of type Lightning Component and add it to the page layout

# Custom Actions - Lightning Component



The screenshot shows a Salesforce Account detail page for 'University of Arizona'. The page includes fields for Account Owner (Ashish Agarwal), Account Name, Parent Account, Account Number, Account Site, Type, Industry, Annual Revenue, External ID, Quip Document Link, Billing Address, and Shipping Address. A red box highlights the 'Actions' section on the right, which contains a 'Follow' button, a 'Quick Contact' button, a 'Generate PDF' button, a 'New Case' button, and a 'Set up an event...' button with an 'Add' button. The 'Actions' section also includes filters, a refresh button, and a 'Upcoming & Overdue' section with a note about no next steps.

1. Added action to the record detail page. Click action

Actions

- + Follow
- Quick Contact
- Generate PDF
- New Case
- Set up an event... Add

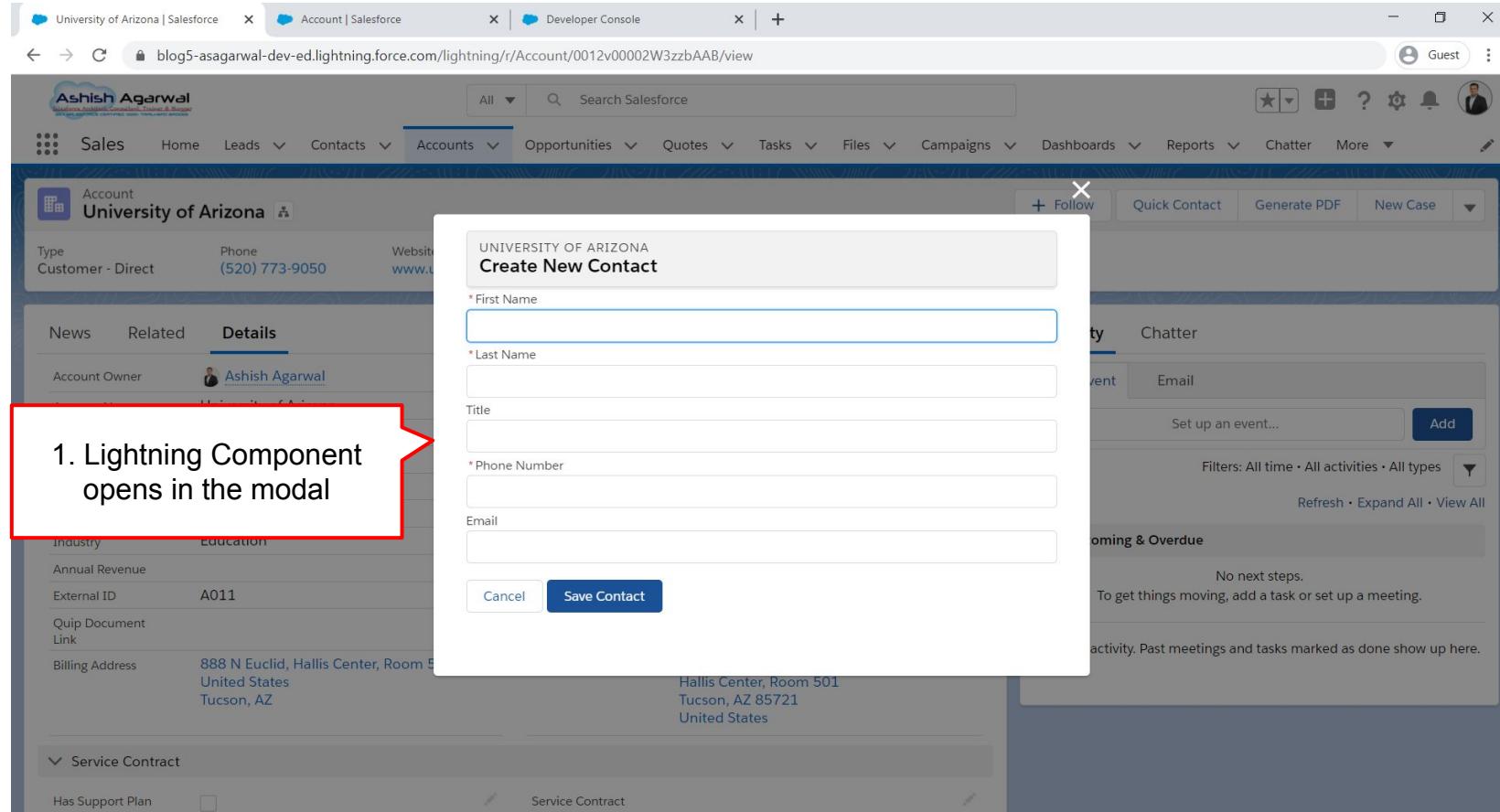
Filters: All time • All activities • All types ▼

Upcoming & Overdue

No next steps.  
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

# Custom Actions - Lightning Component



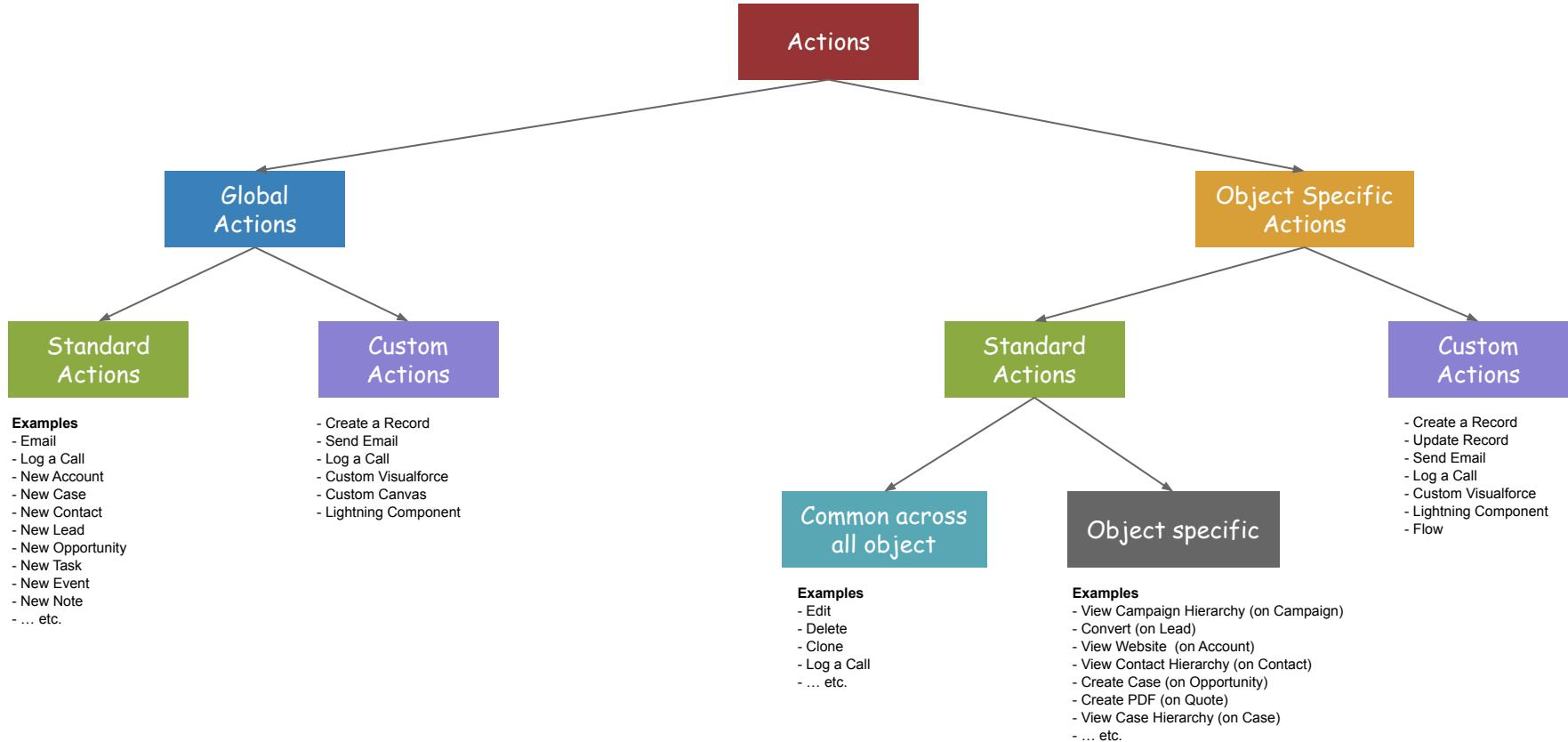
The screenshot shows a Salesforce interface with three tabs at the top: "University of Arizona | Salesforce", "Account | Salesforce", and "Developer Console". The URL in the address bar is "blog5-asagarwal-dev-ed.lightning.force.com/lightning/r/Account/0012v00002W3zzbAAB/view". The main content area displays an "Account" record for "University of Arizona". The "Details" tab is selected, showing fields like Type (Customer - Direct), Phone ((520) 773-9050), and Website (www.u.arizona.edu). A red box highlights the "Create New Contact" modal, which is centered over the account details. The modal has a header "UNIVERSITY OF ARIZONA Create New Contact" and fields for First Name, Last Name, Title, Phone Number, and Email. At the bottom are "Cancel" and "Save Contact" buttons. The background shows a Chatter sidebar with a "Chatter" tab selected, showing a list of posts and activity.

1. Lightning Component opens in the modal

# Steps Overview



# Action Types in Salesforce



# Leave Your Feedback

Hope that you enjoyed following this guide. Please do not forget to leave your comments, suggestions and ideas on my blog at URL  
<https://www.asagarwal.com/step-by-step-guide-on-actions-in-lightning-experience>

If you got stuck anywhere in following this guide and were able to resolve the issue, please mention that as a comment on the blog URL above so that others can benefit from your experience

# Thank You !

For Regular Dose of Useful Tips & Tricks on  
Salesforce.com, Please Visit <https://www.asagarwal.com>

# Document Change Log

Version	Changes
1.0	First Release