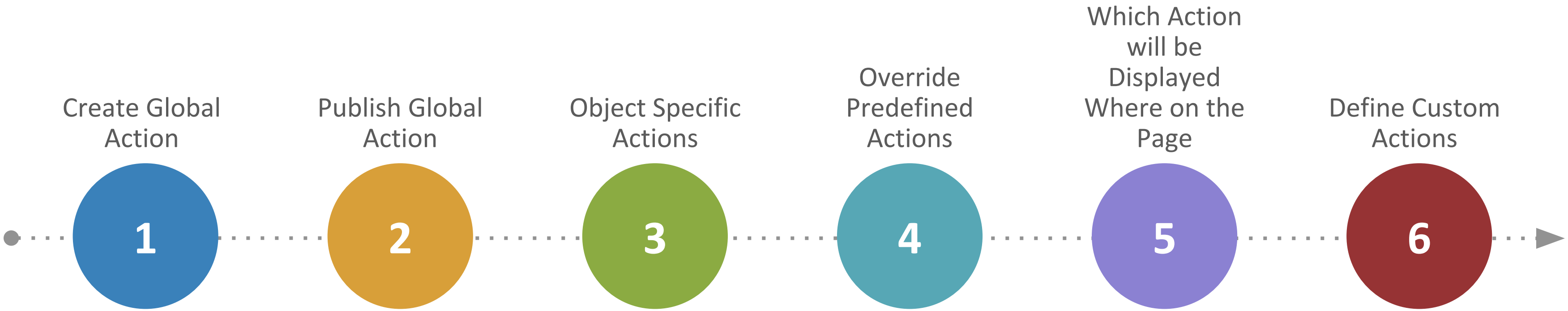
Step-by-Step Guide
On Actions in Lightning Experience

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

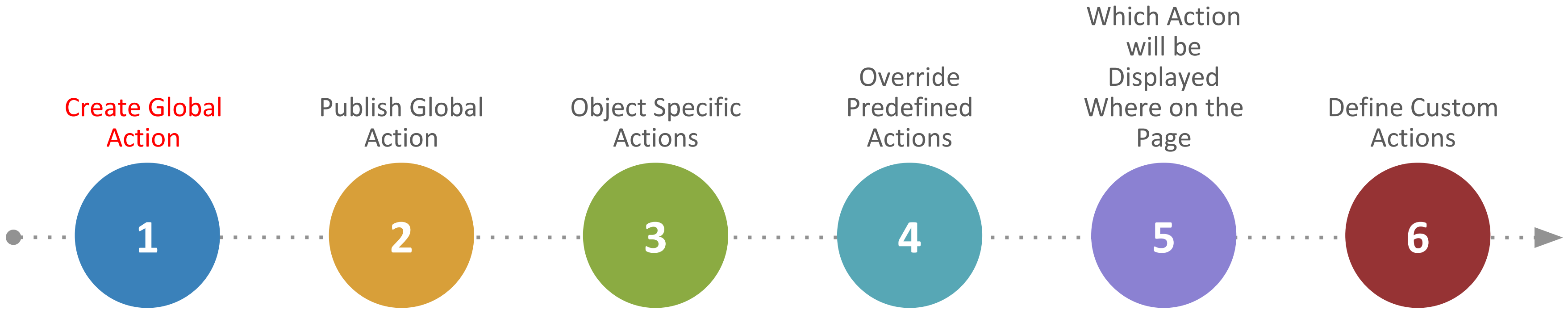
https://www.asagarwal.com/step-by-step-guide-on-actions-in-lightning-experience

Use Cases (Real Life Scenarios)

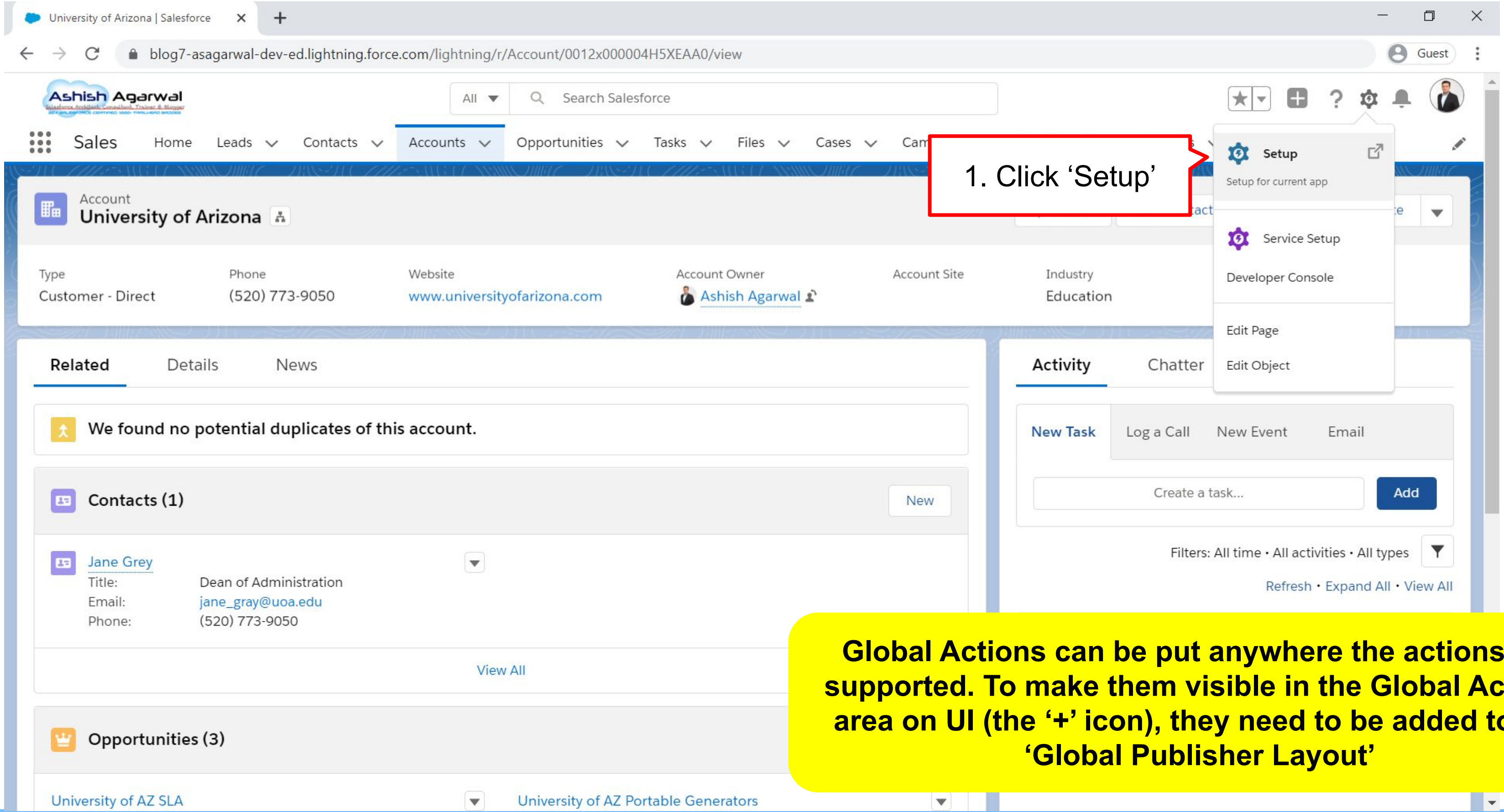
Where will you use this?

- 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

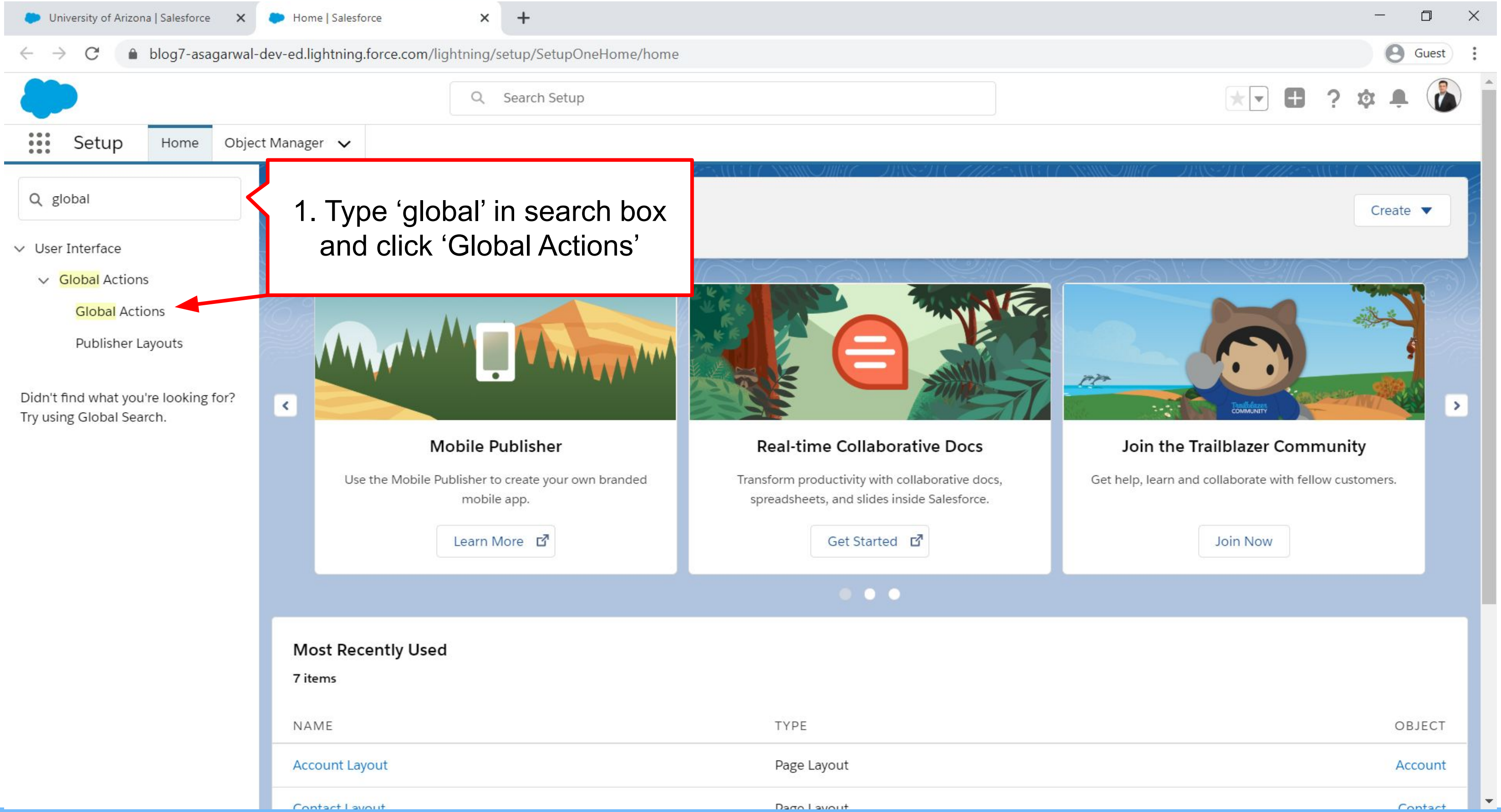


Create Global Action

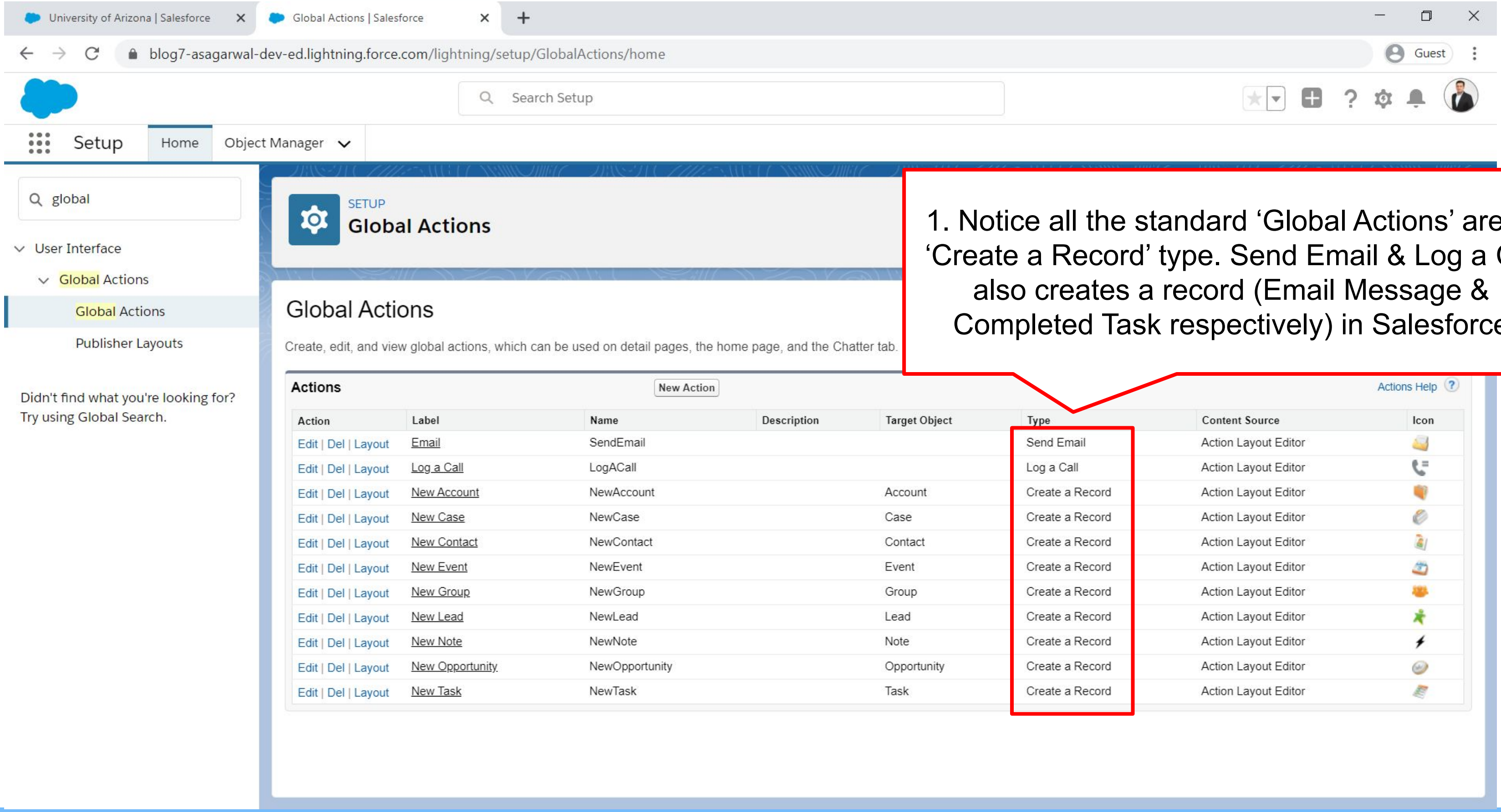


Global Actions can be put anywhere the actions are supported. To make them visible in the Global Actions area on UI (the '+' icon), they need to be added to the 'Global Publisher Layout'

Create Global Action



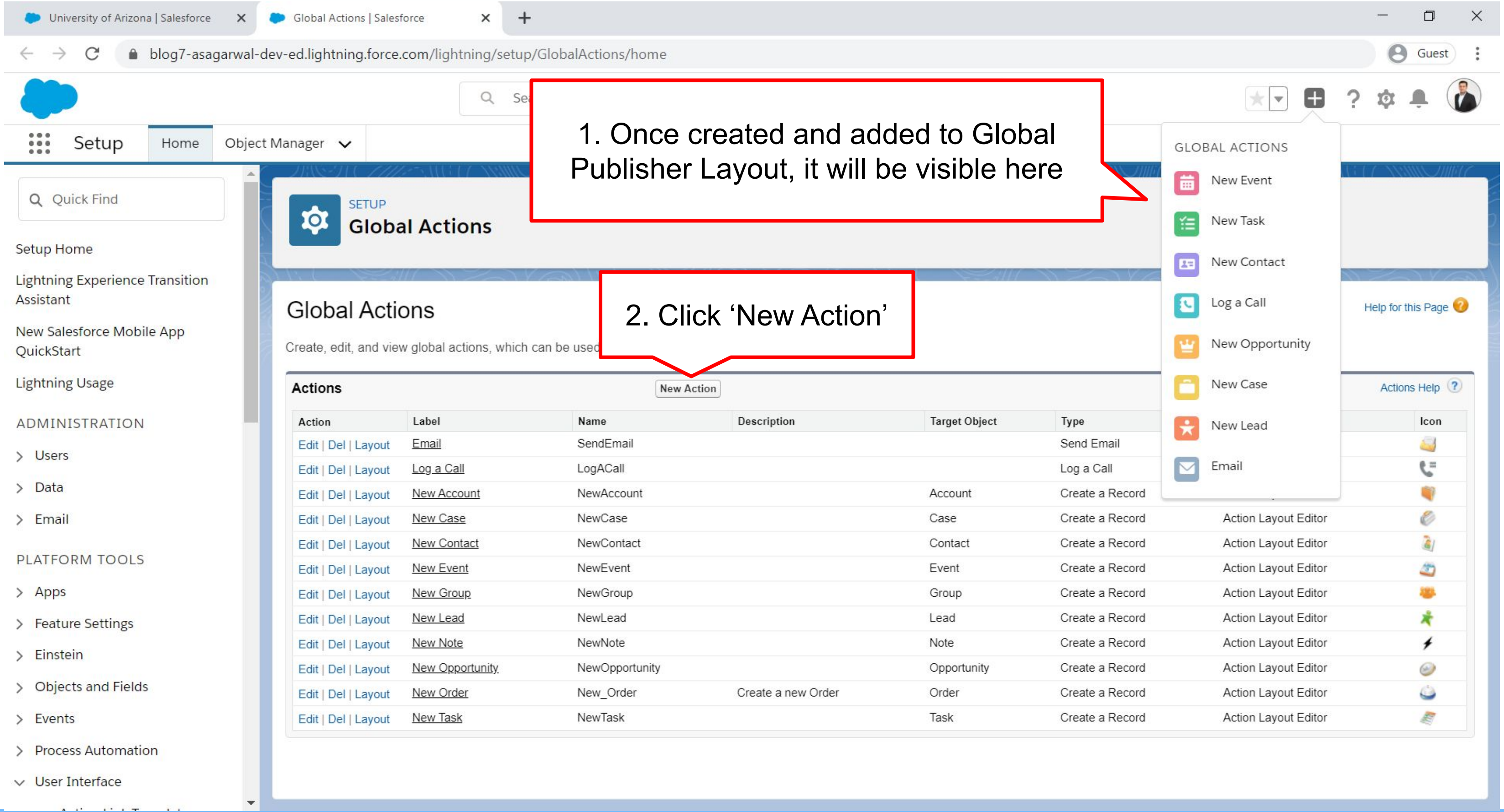
Create Global Action



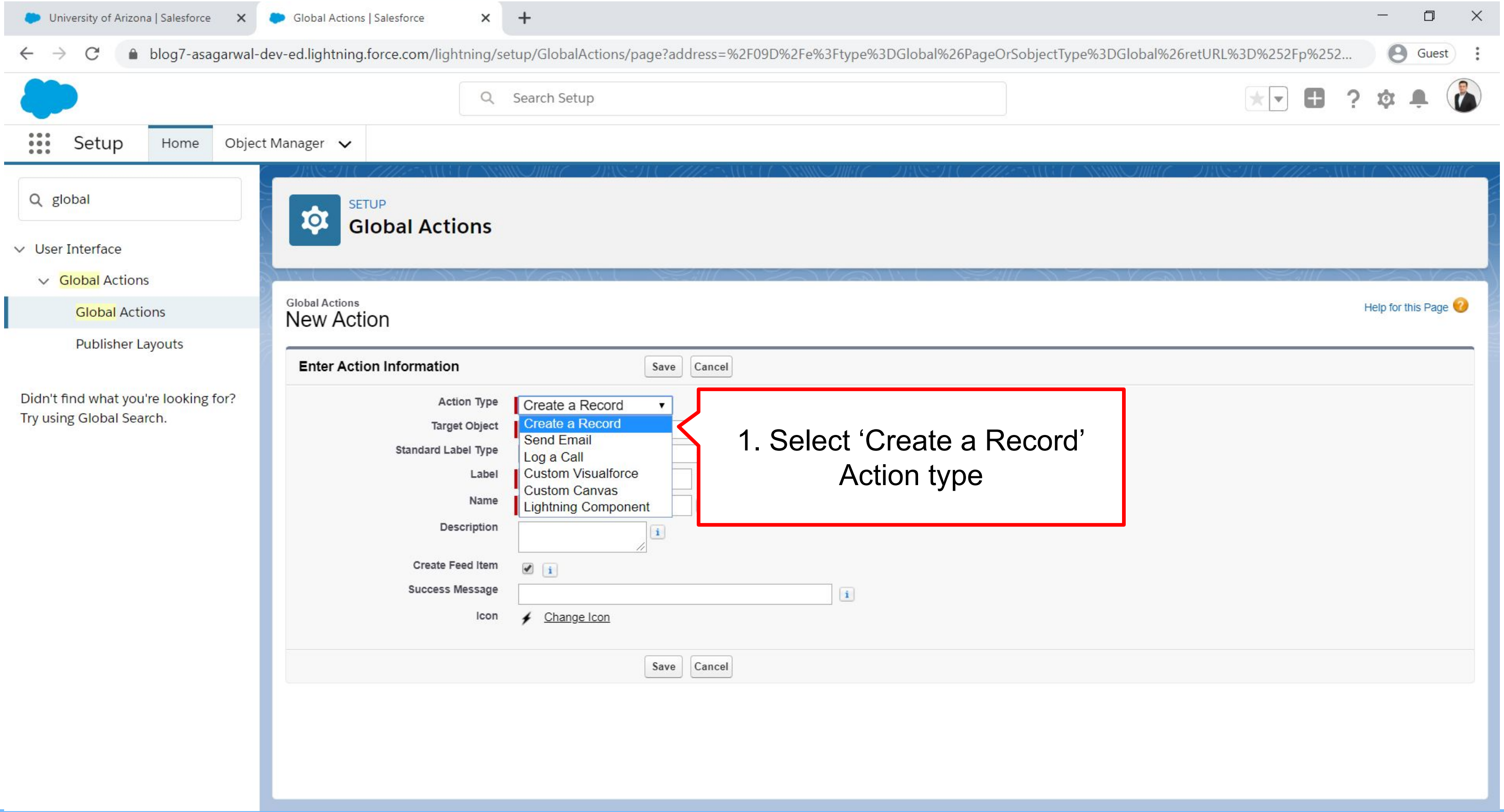
Action	Label	Name	Description	Target Object	Type	Content Source	Icon
Edit | Del | Layout	Email	SendEmail			Send Email	Action Layout Editor	
Edit | Del | Layout	Log a Call	LogACall			Log a Call	Action Layout Editor	
Edit | Del | Layout	New Account	NewAccount		Account	Create a Record	Action Layout Editor	
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 Task	NewTask		Task	Create a Record	Action Layout Editor	

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

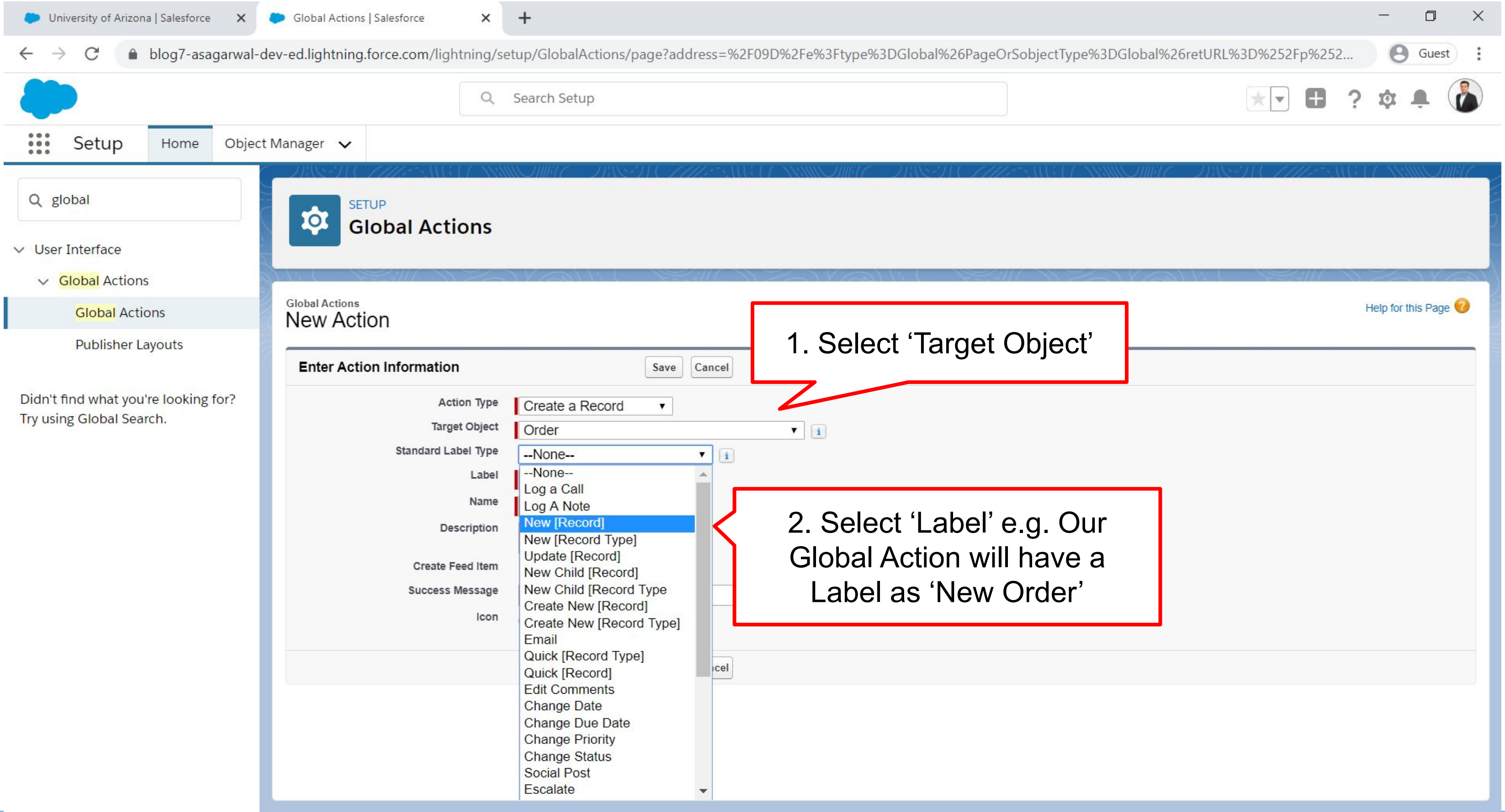
Create Global Action



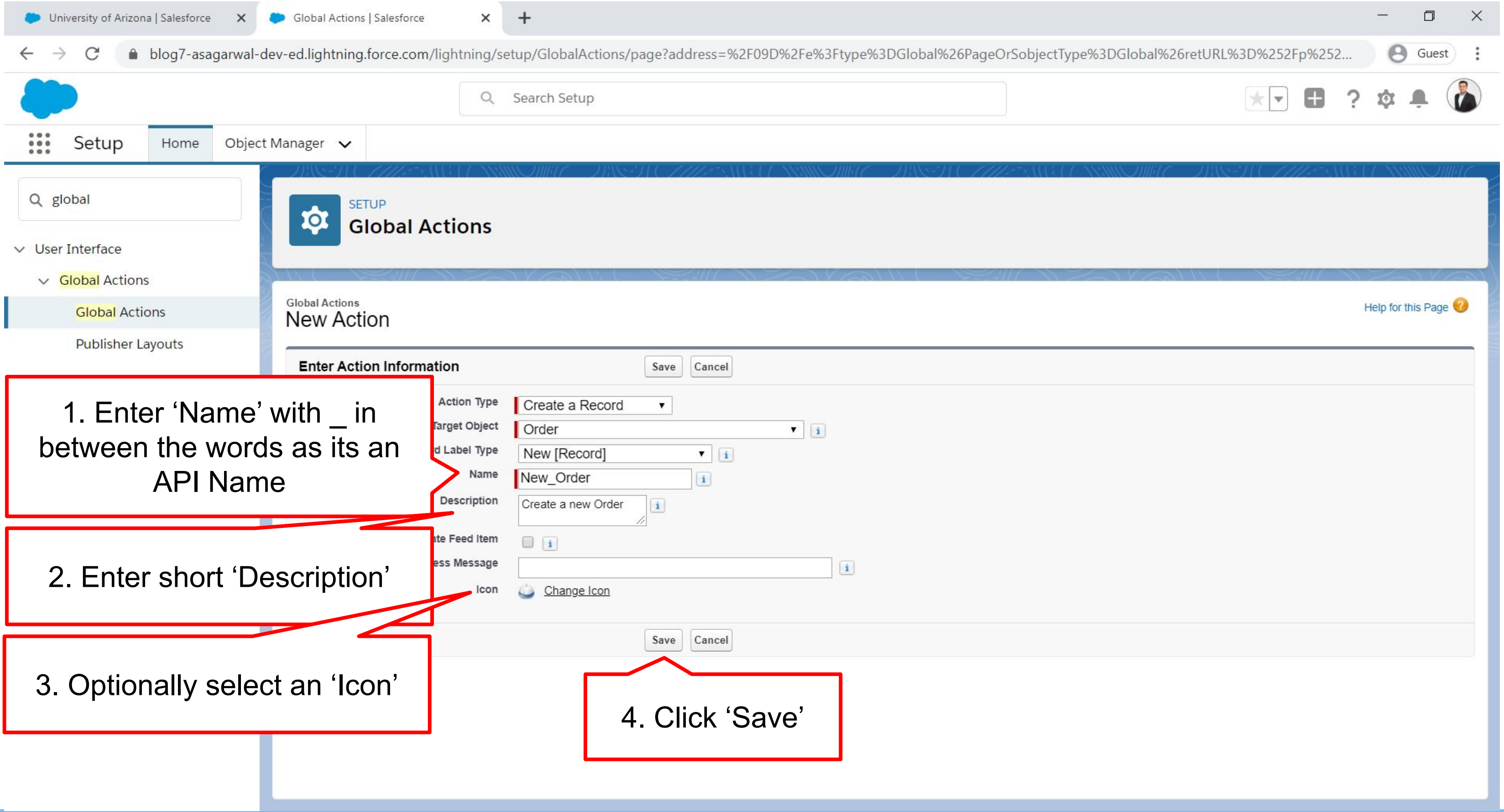
Create Global Action



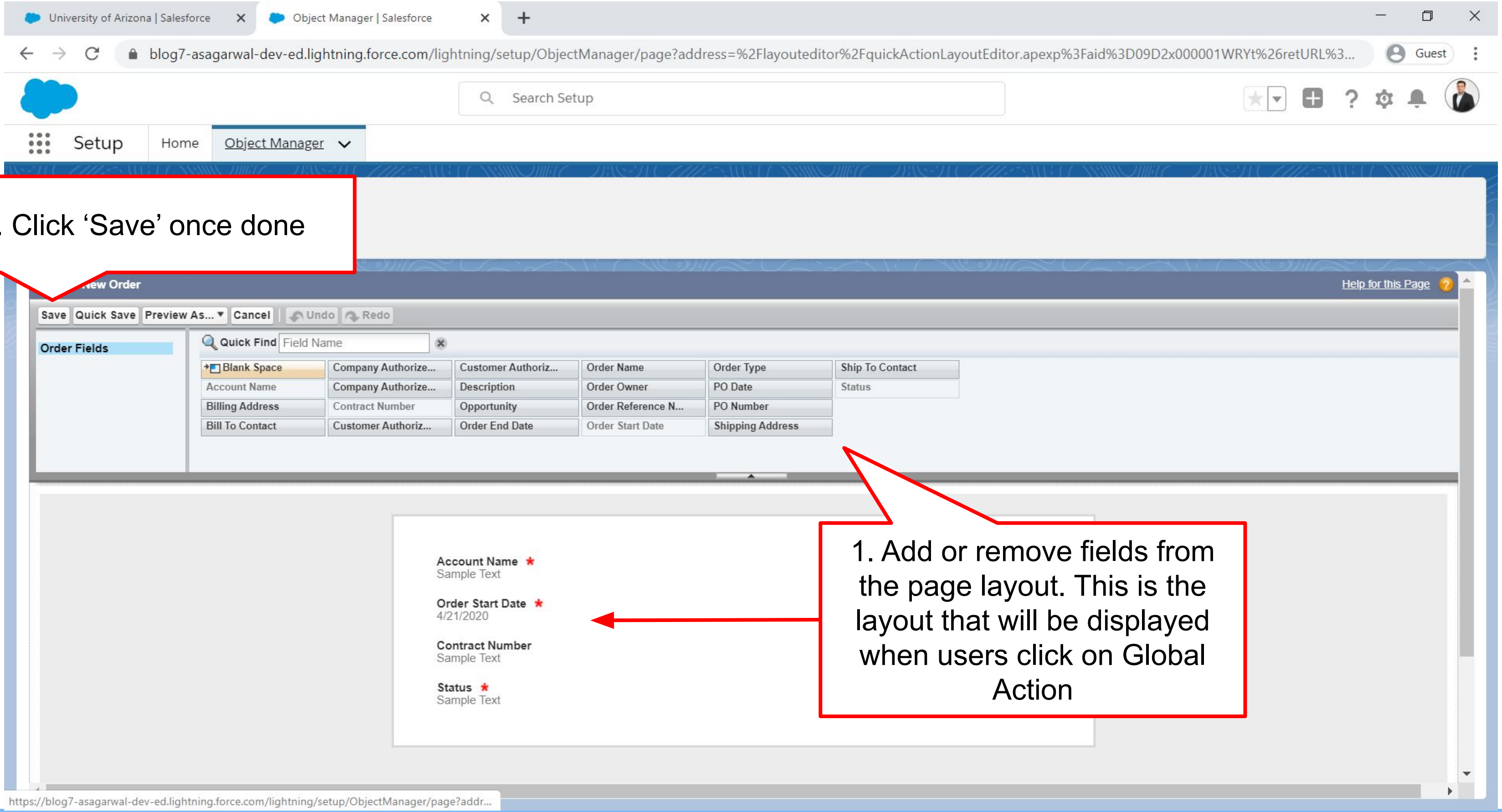
Create Global Action



Create Global Action



Create Global Action



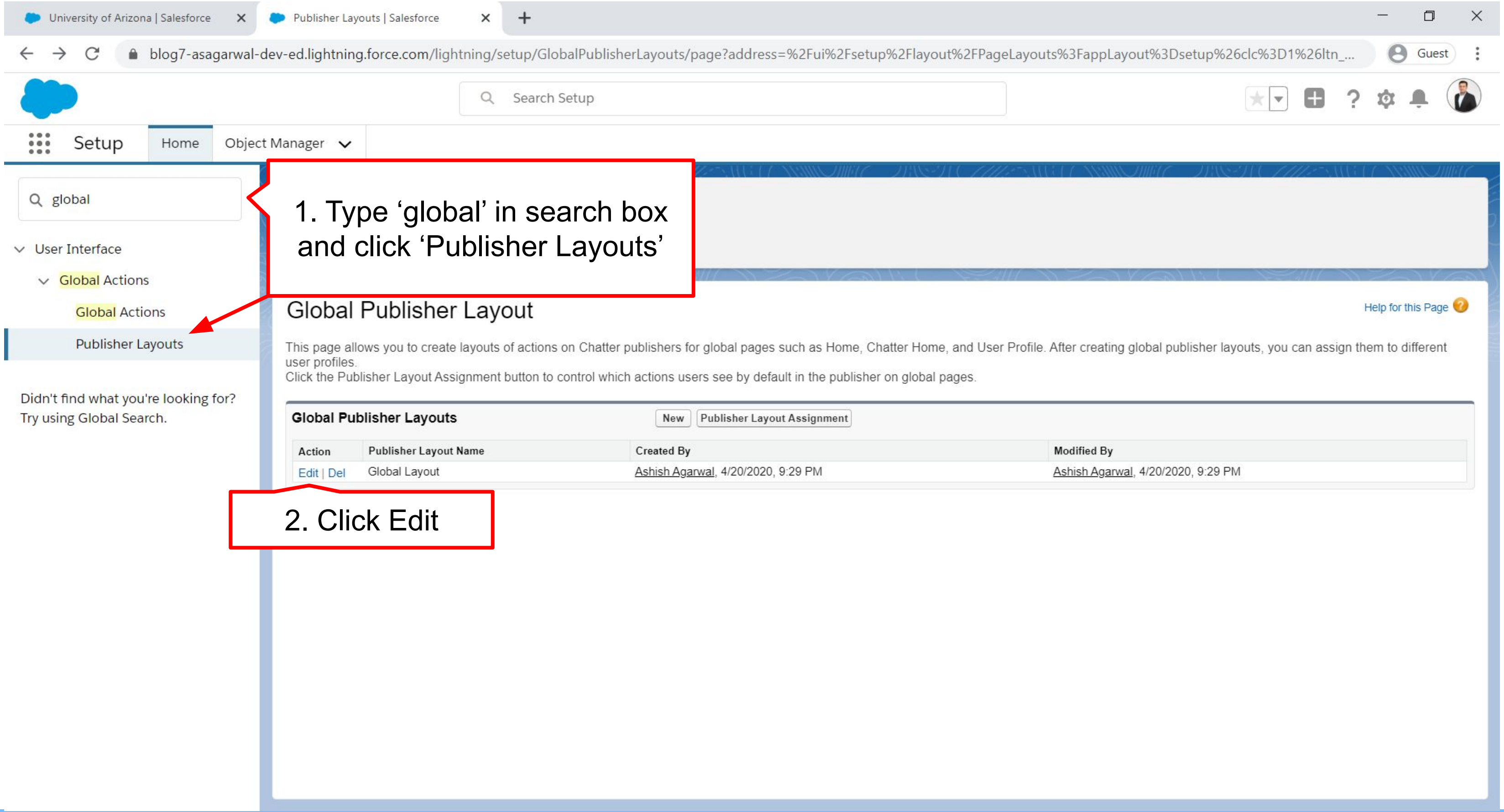
2. Click 'Save' once done

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

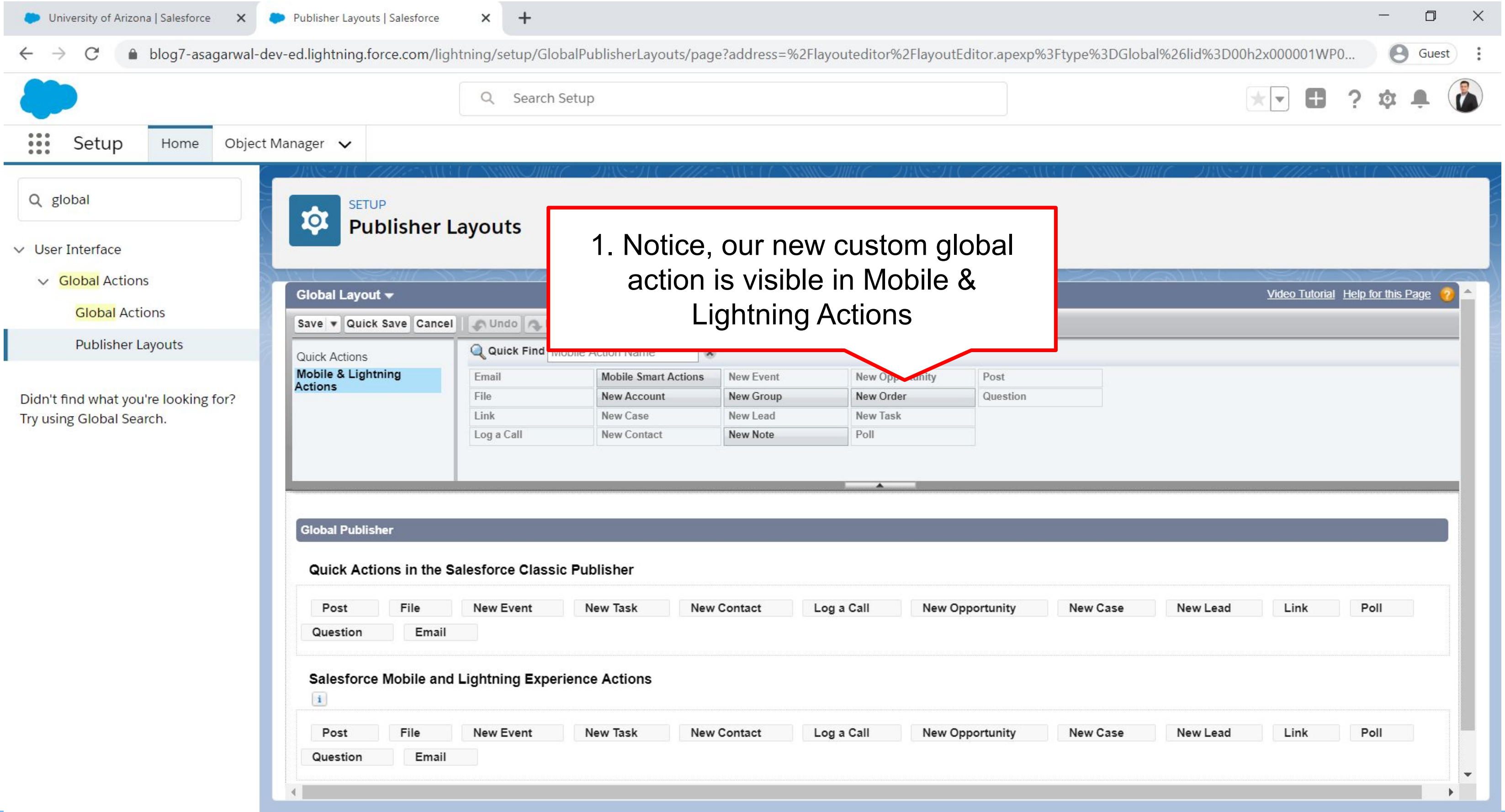
Steps Overview

1. Create Global Action
2. Publish Global Action
3. Object Specific Actions
4. Override Predefined Actions
5. Which Action will be Displayed Where on the Page
6. Define Custom Actions

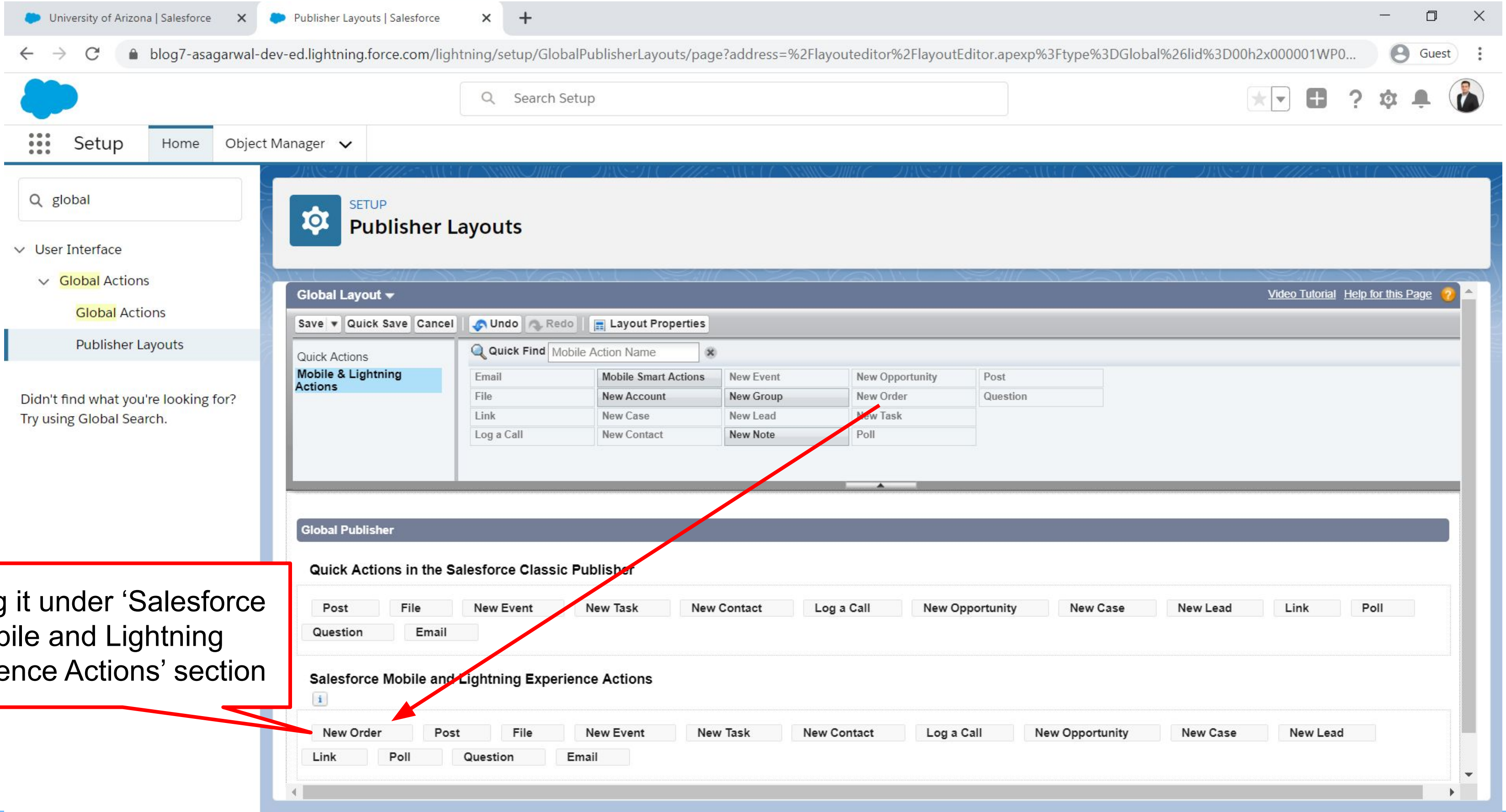
Publish Global Action - Global Publisher Layout



Publish Global Action - Global Publisher Layout

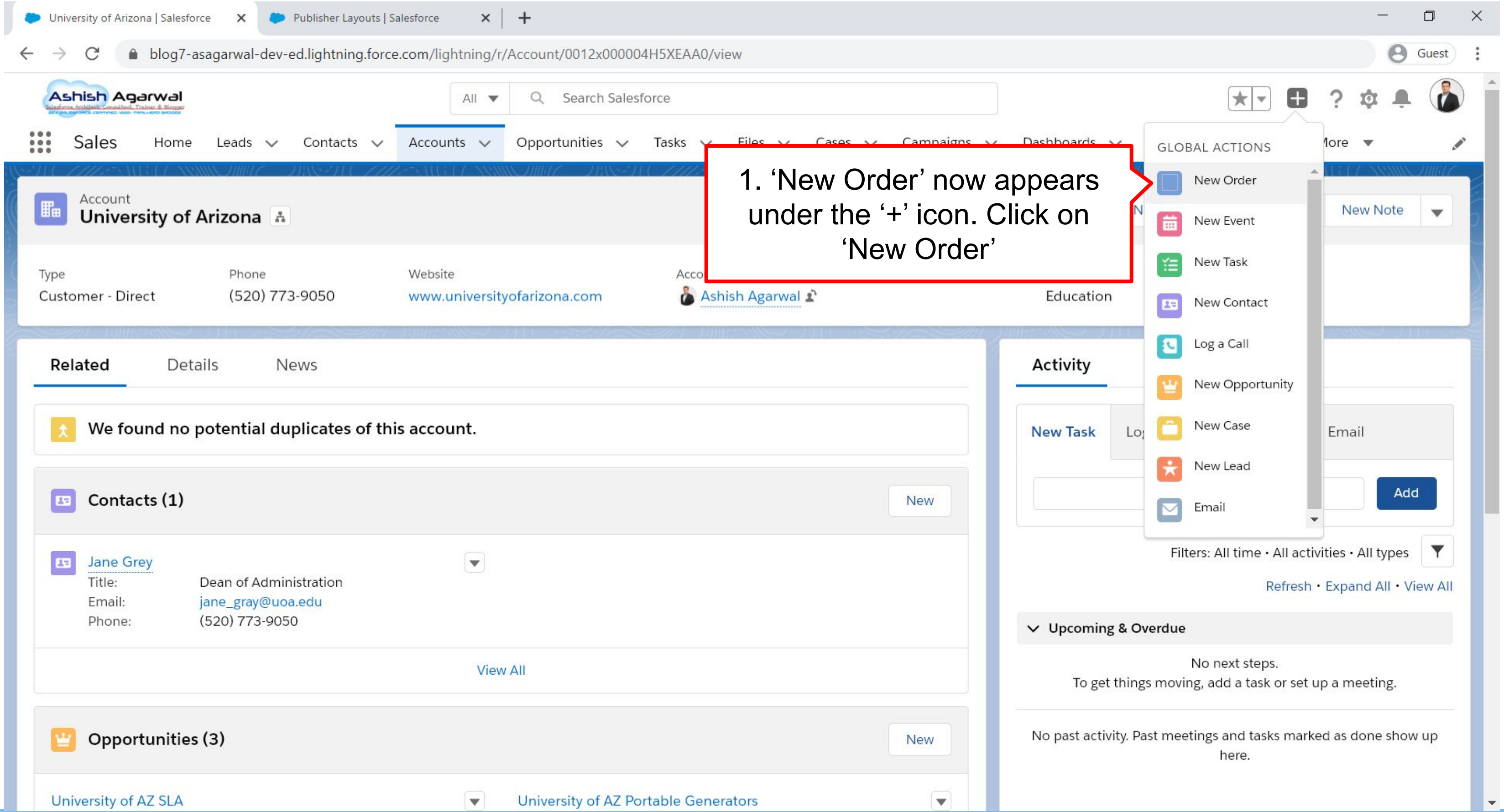


Publish Global Action - Global Publisher Layout

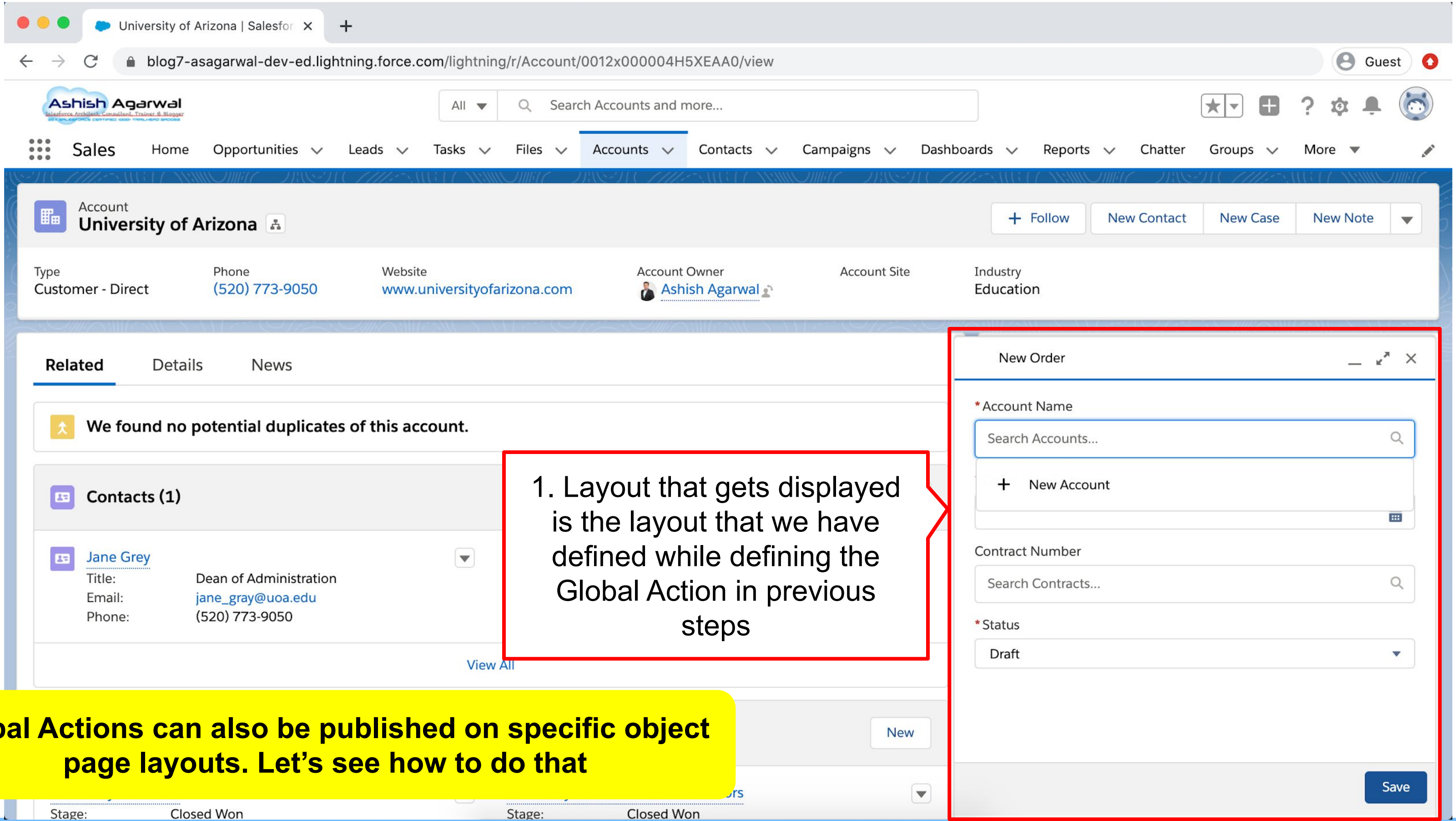


1. Drag it under ‘Salesforce Mobile and Lightning Experience Actions’ section

Publish Global Action - Global Publisher Layout



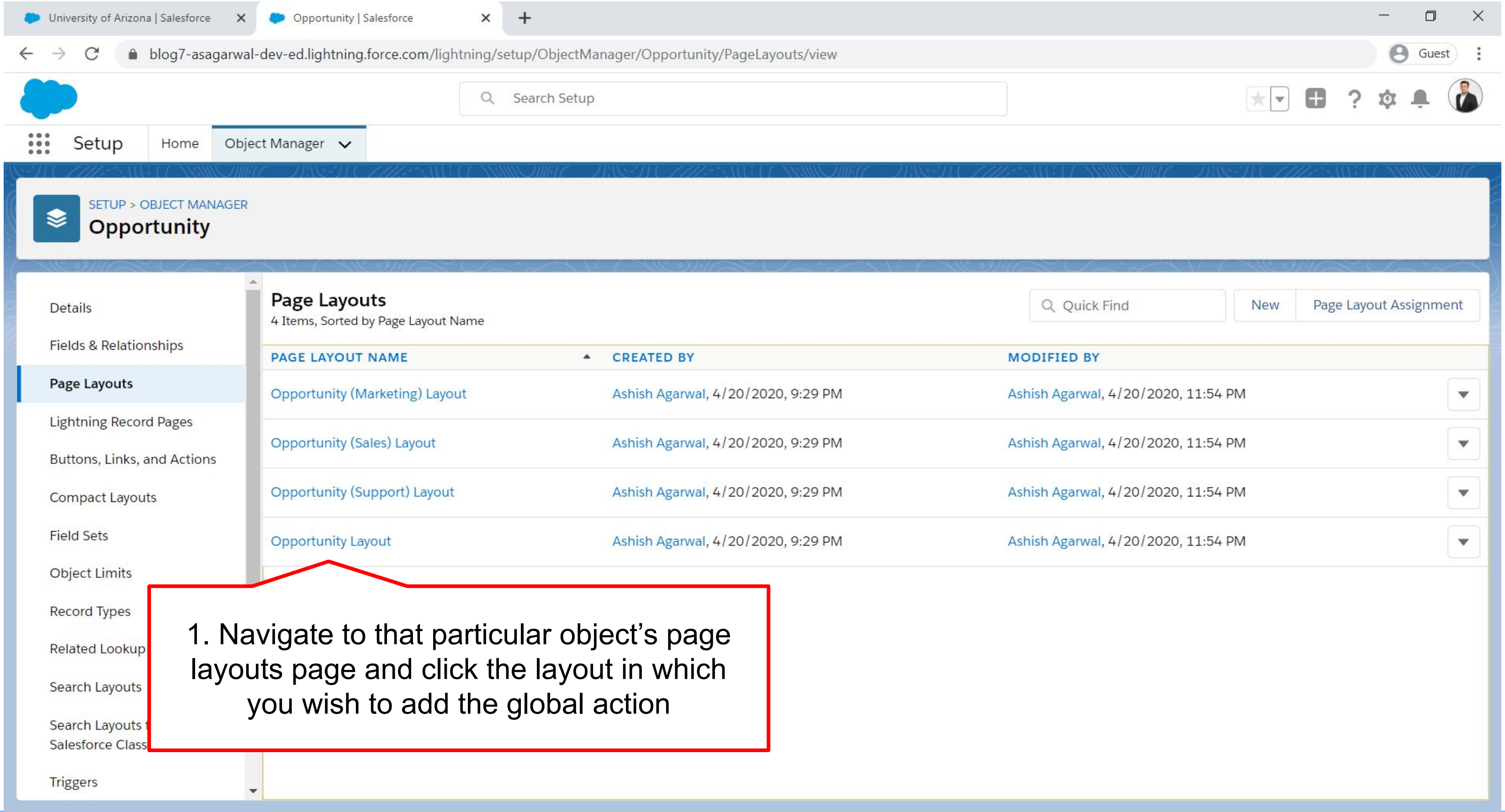
Publish Global Action - Global Publisher Layout



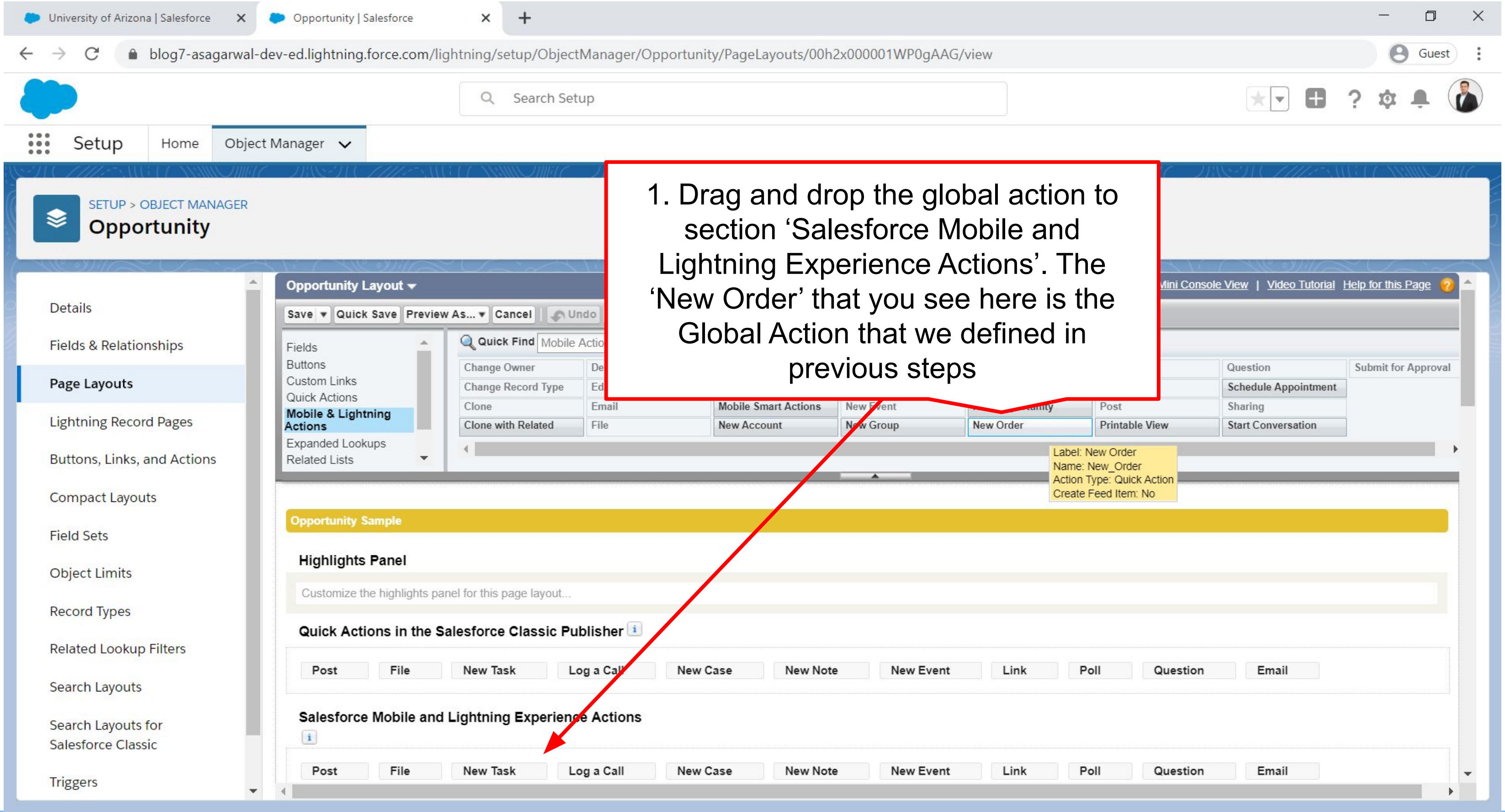
1. Layout that gets displayed is the layout that we have defined while defining the Global Action in previous steps

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

Publish Global Action - Object Page Layout

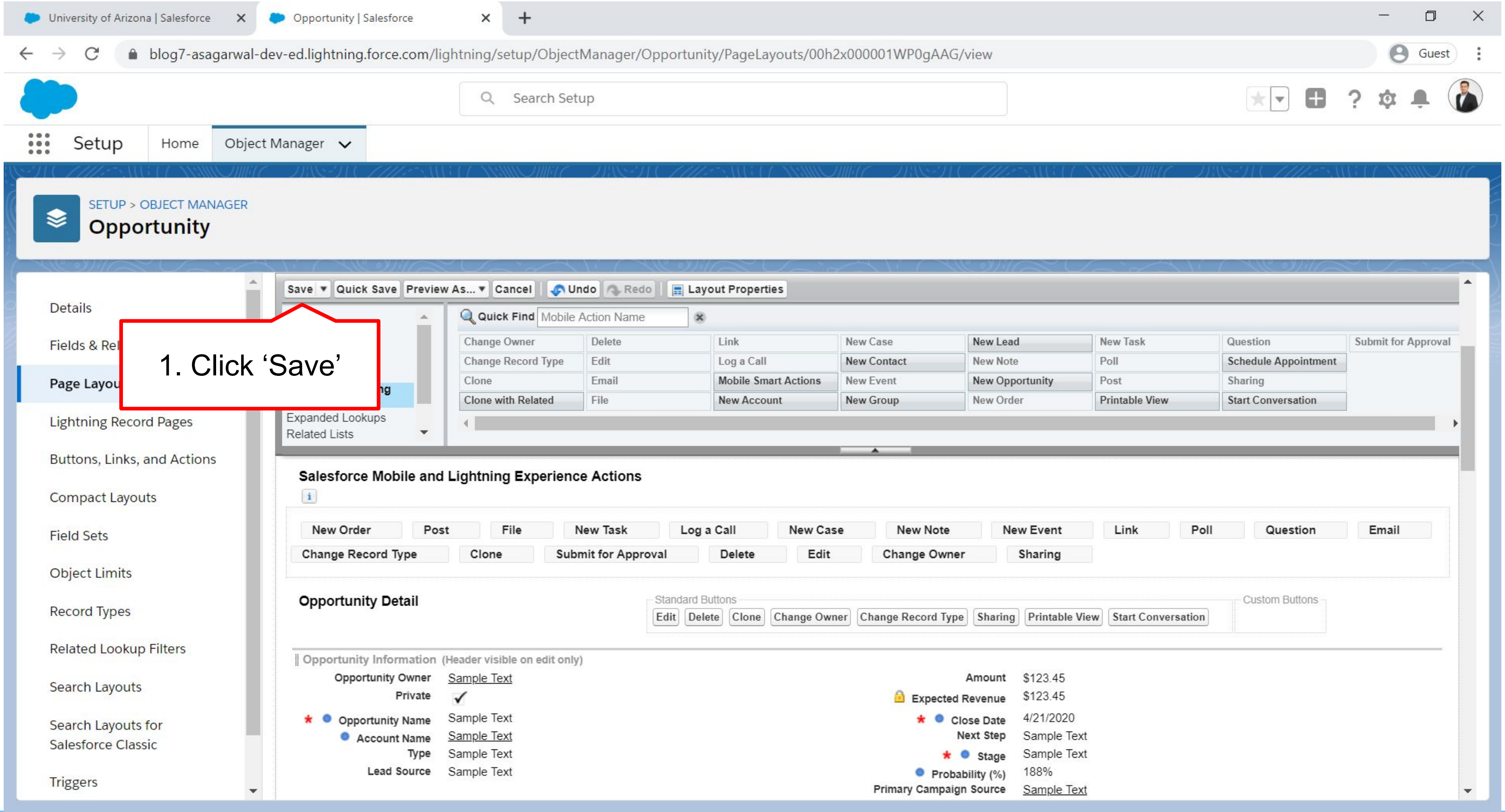


Publish Global Action - Object Page Layout

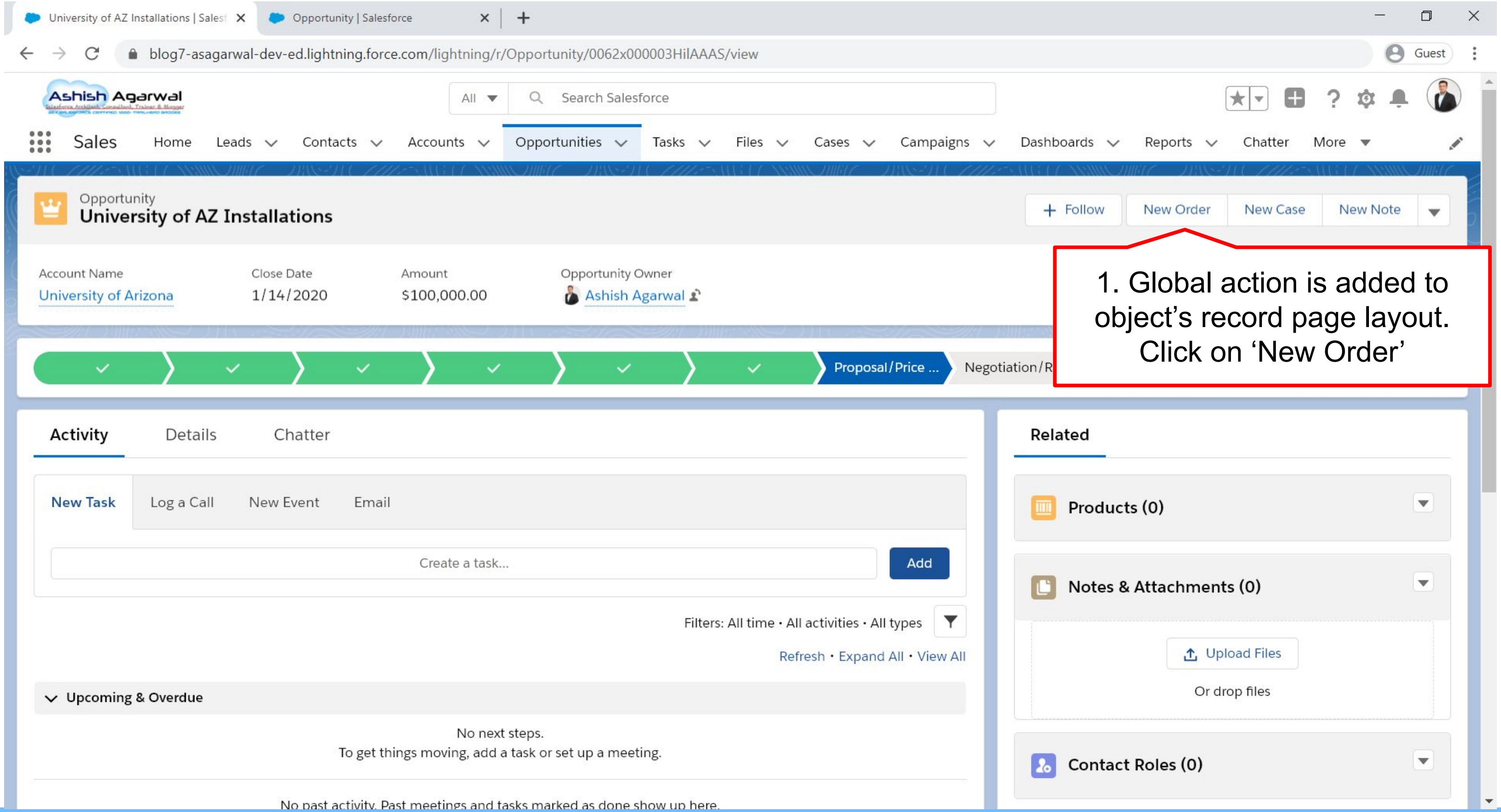


1. Drag and drop the global action to section ‘Salesforce Mobile and Lightning Experience Actions’. The ‘New Order’ that you see here is the Global Action that we defined in previous steps

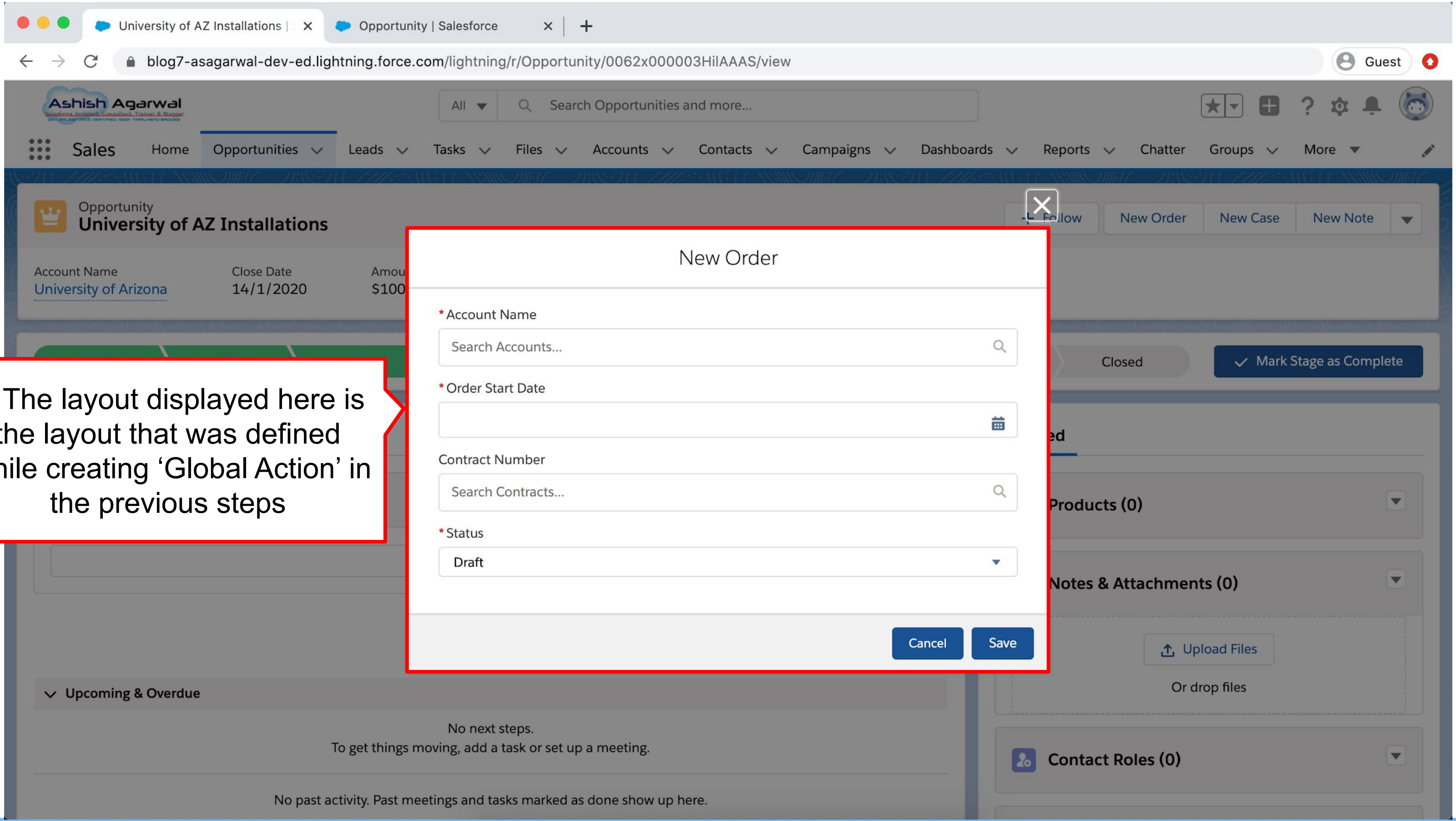
Publish Global Action - Object Page Layout



Publish Global Action - Object Page Layout

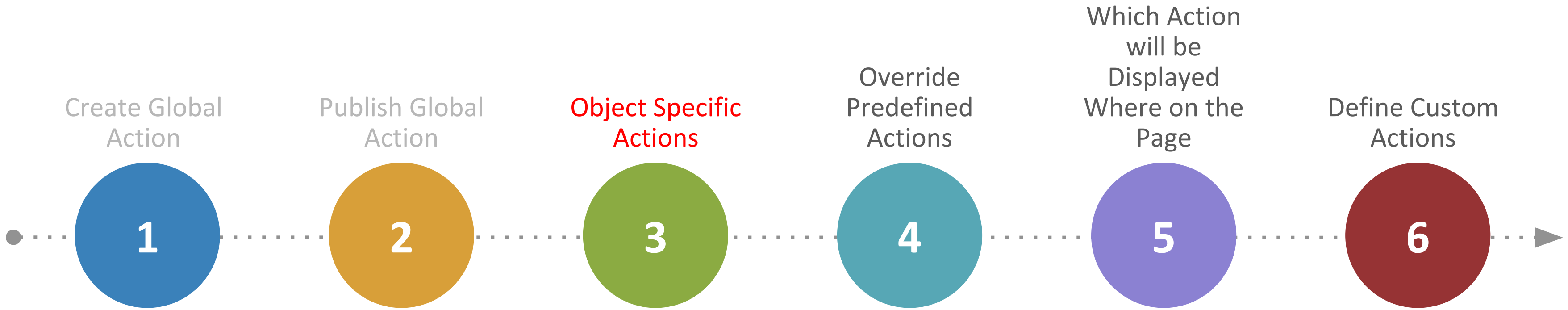


Publish Global Action - Object Page Layout

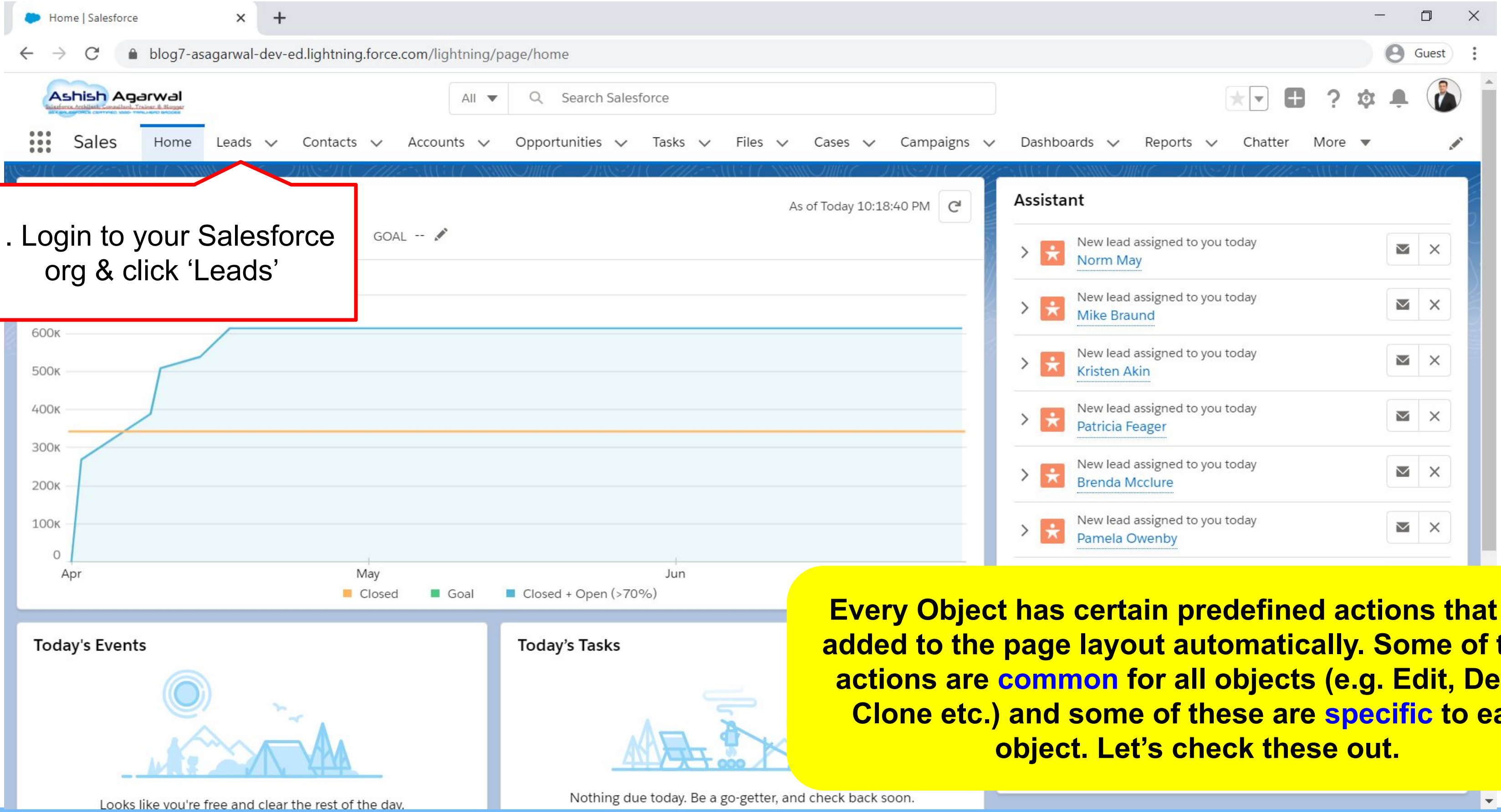


1. The layout displayed here is the layout that was defined while creating ‘Global Action’ in the previous steps

Steps Overview



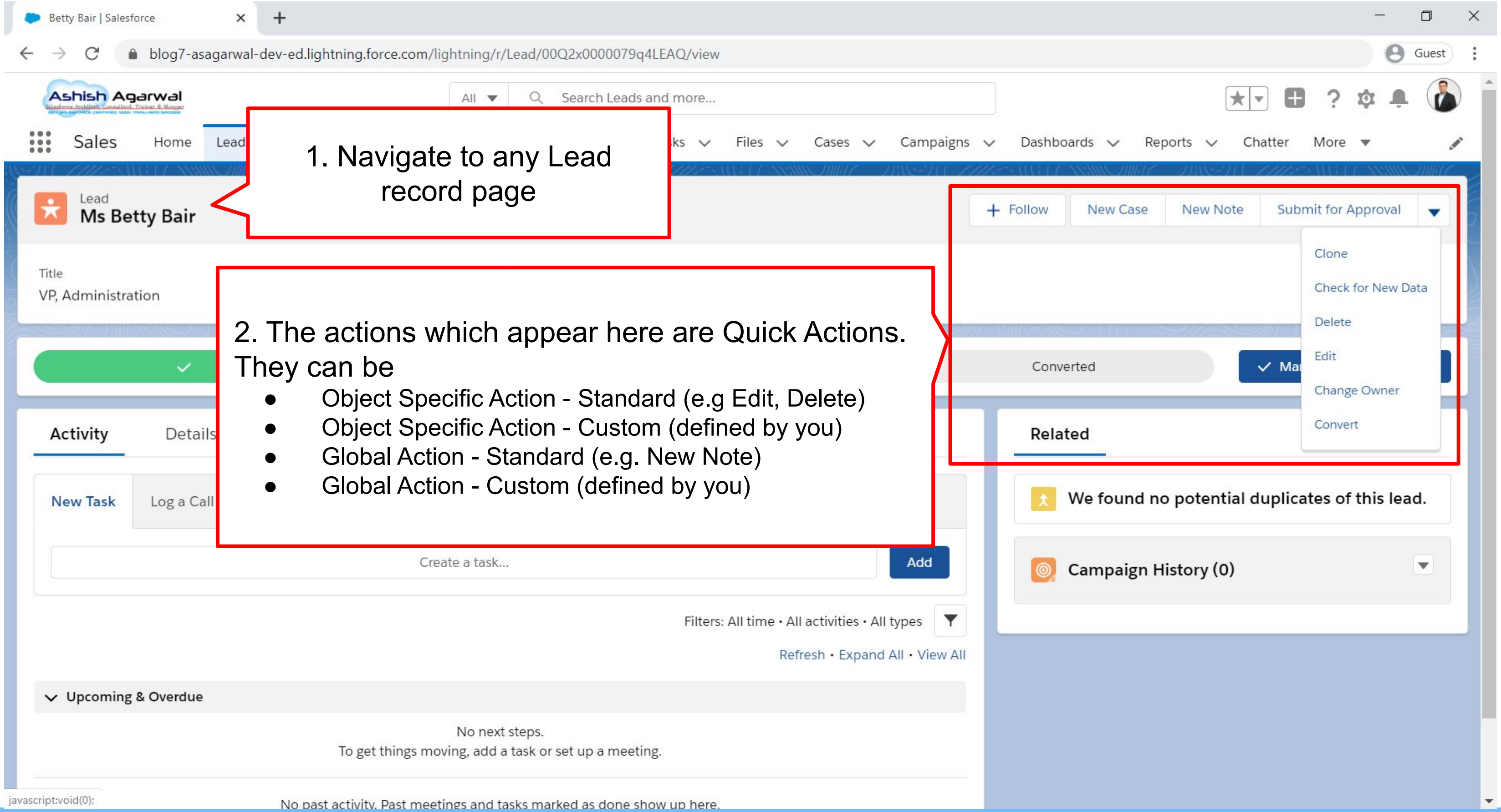
Object Specific Actions



1. Login to your Salesforce org & click ‘Leads’

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

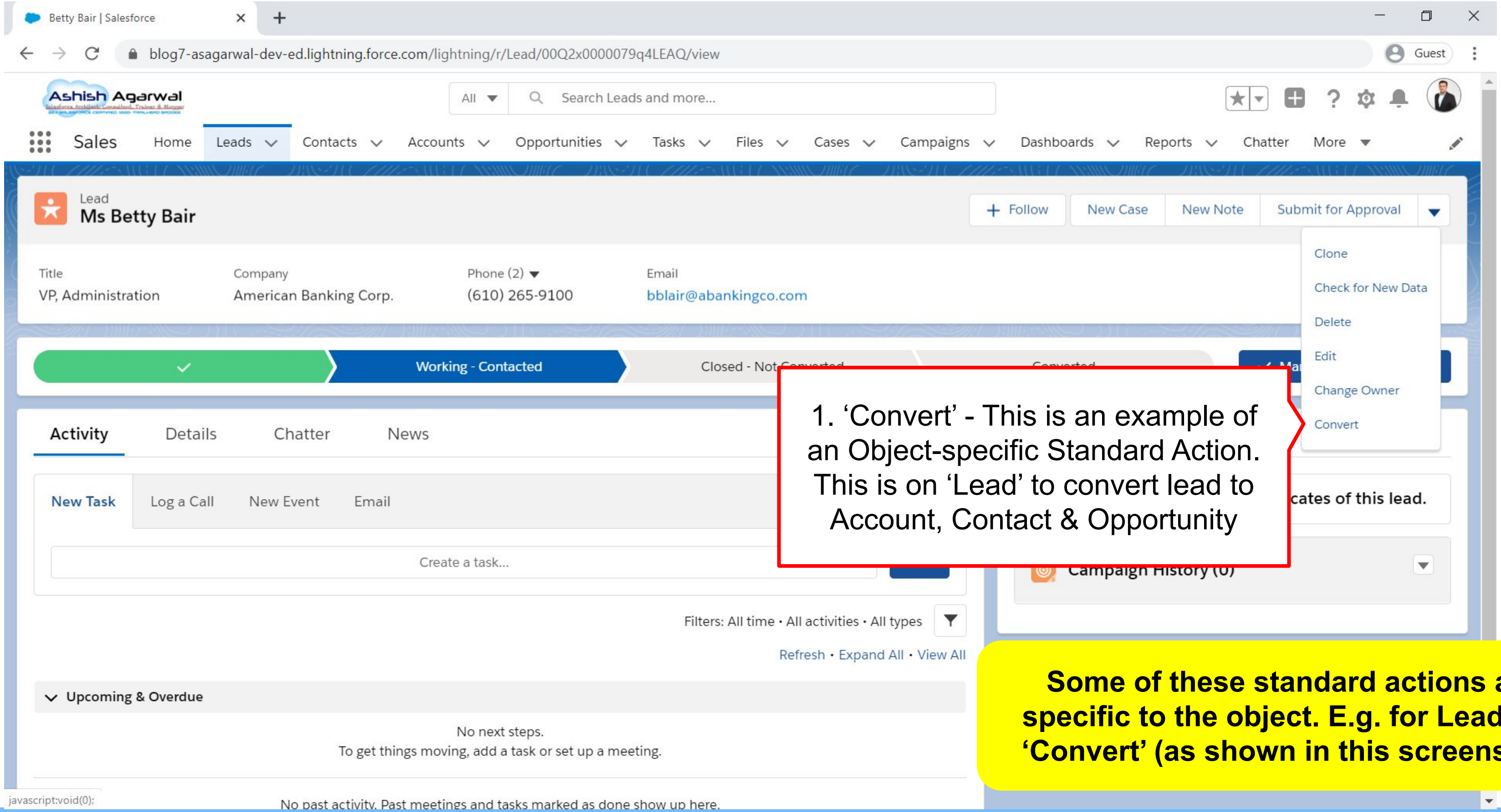


1. Navigate to any Lead record page

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)

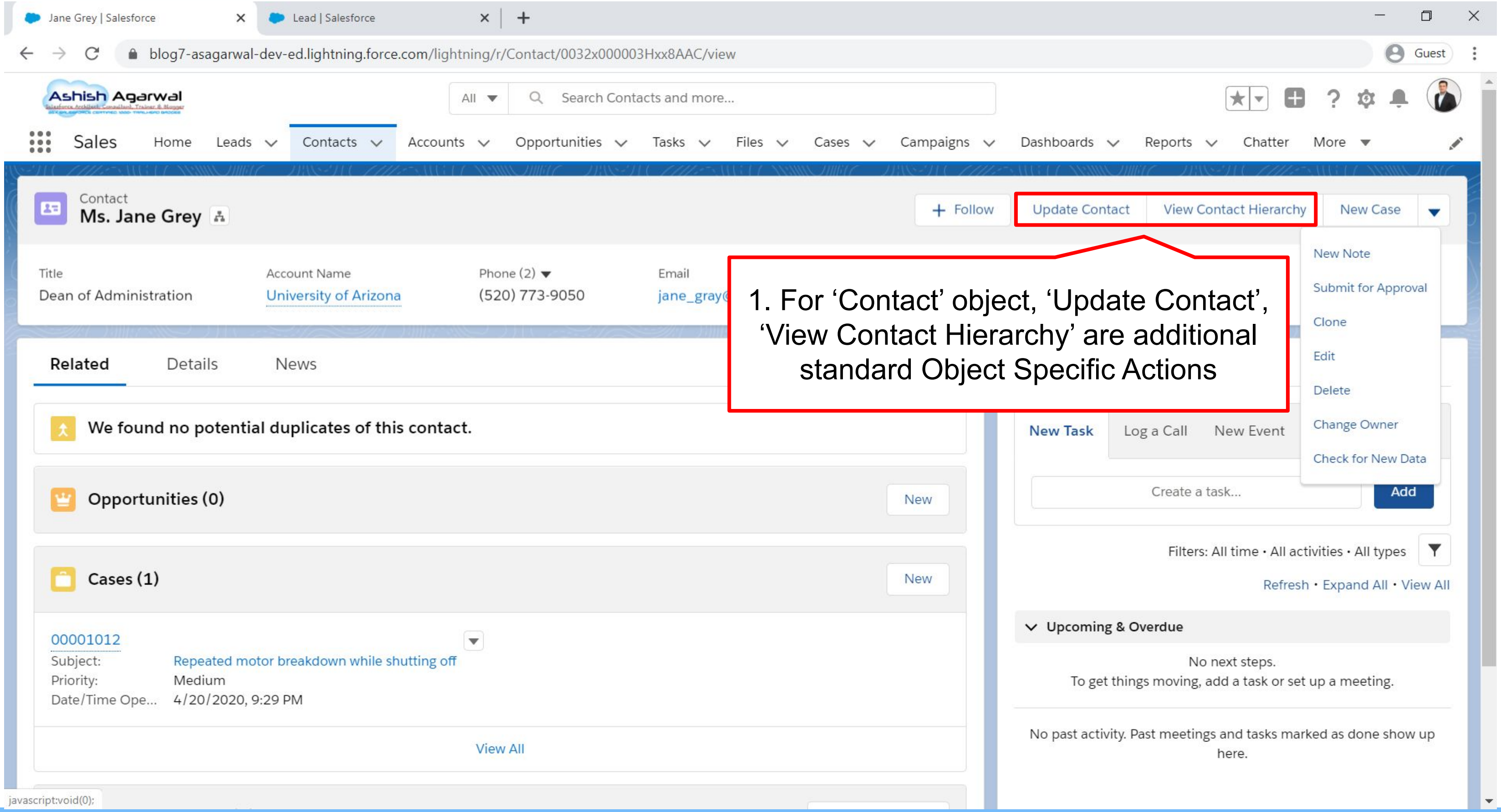
Object Specific Actions



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

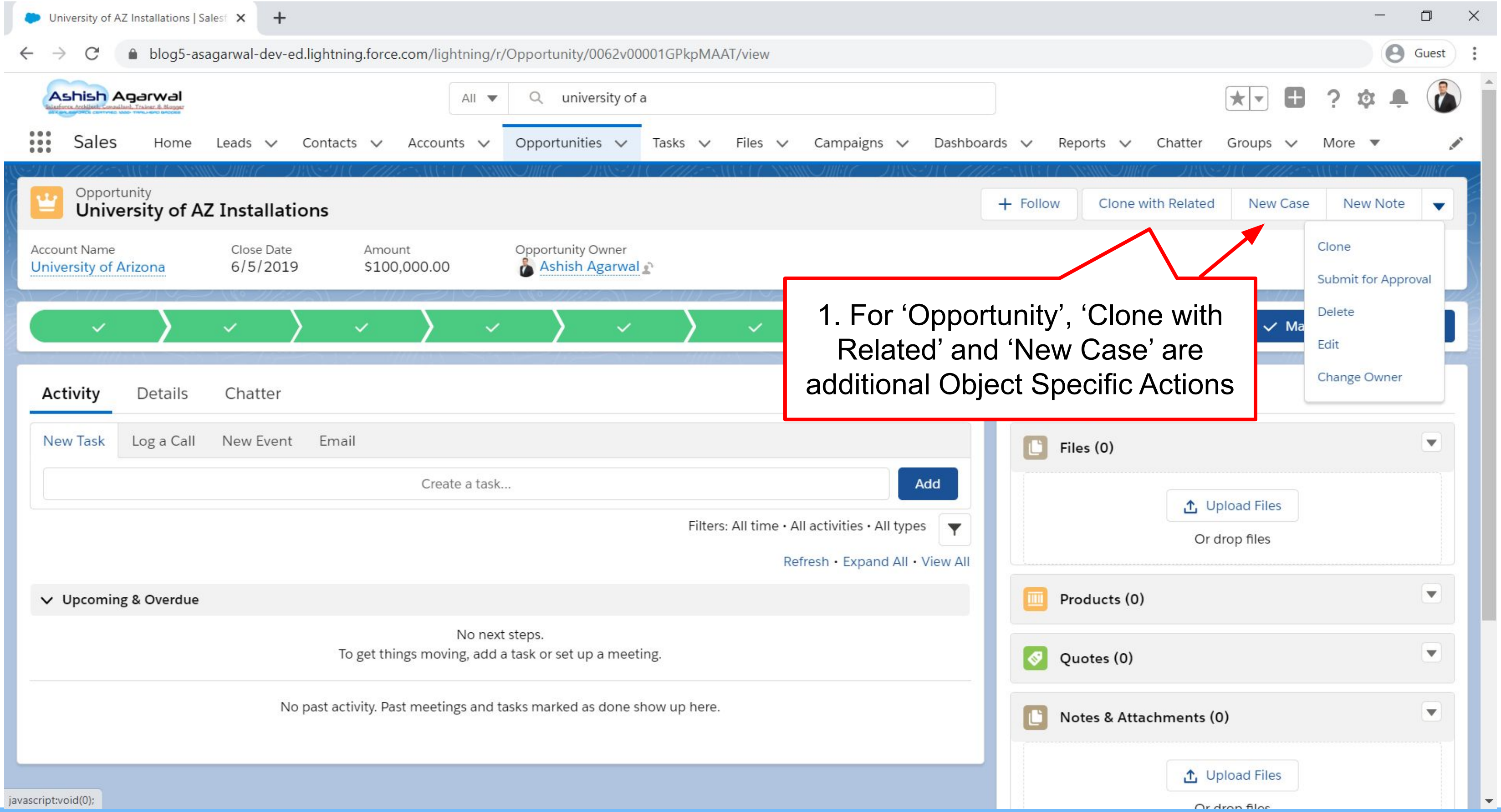
Some of these standard actions are specific to the object. E.g. for Lead it is ‘Convert’ (as shown in this screenshot)

Object Specific Actions

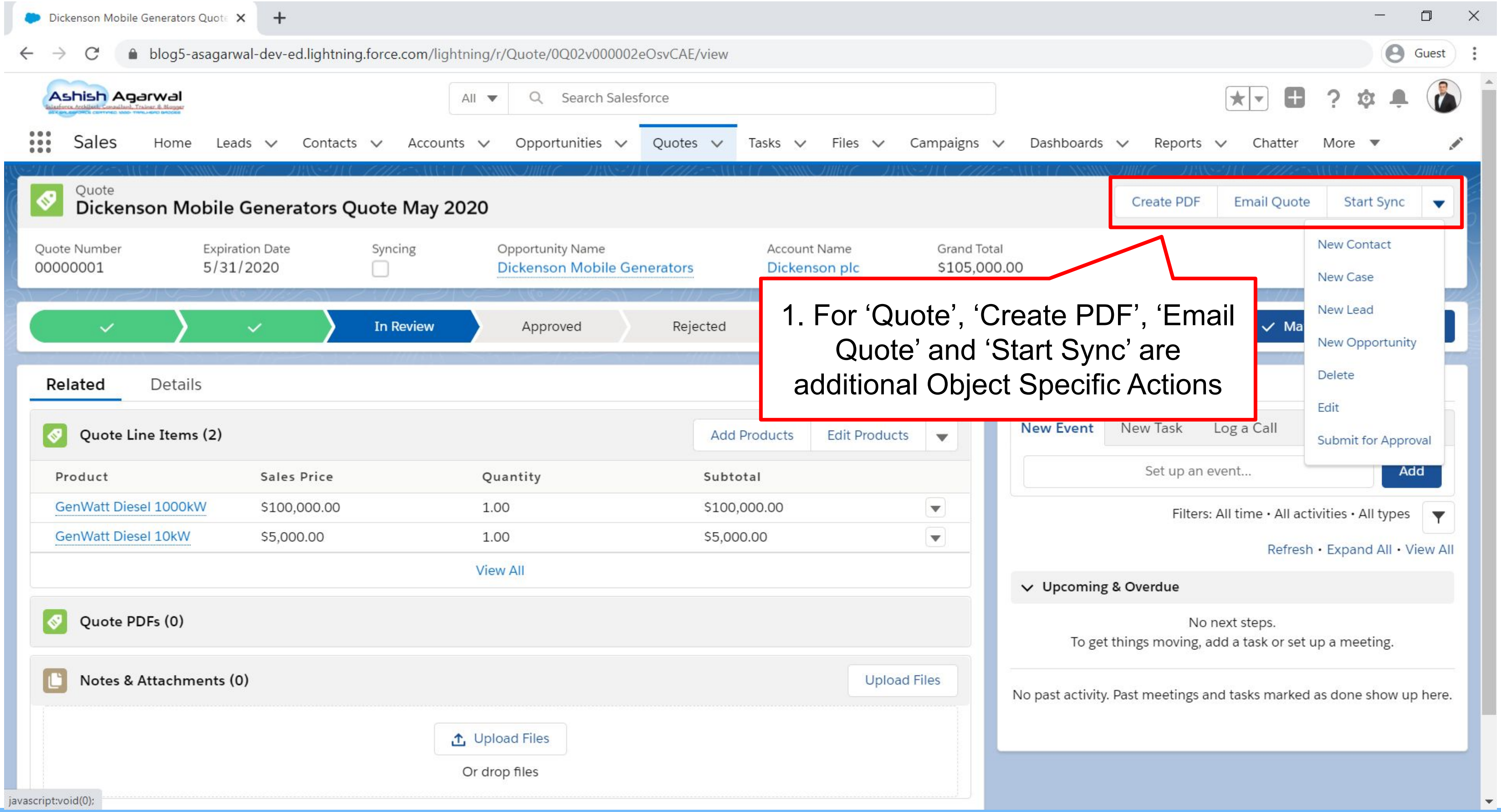


1. For ‘Contact’ object, ‘Update Contact’, ‘View Contact Hierarchy’ are additional standard Object Specific Actions

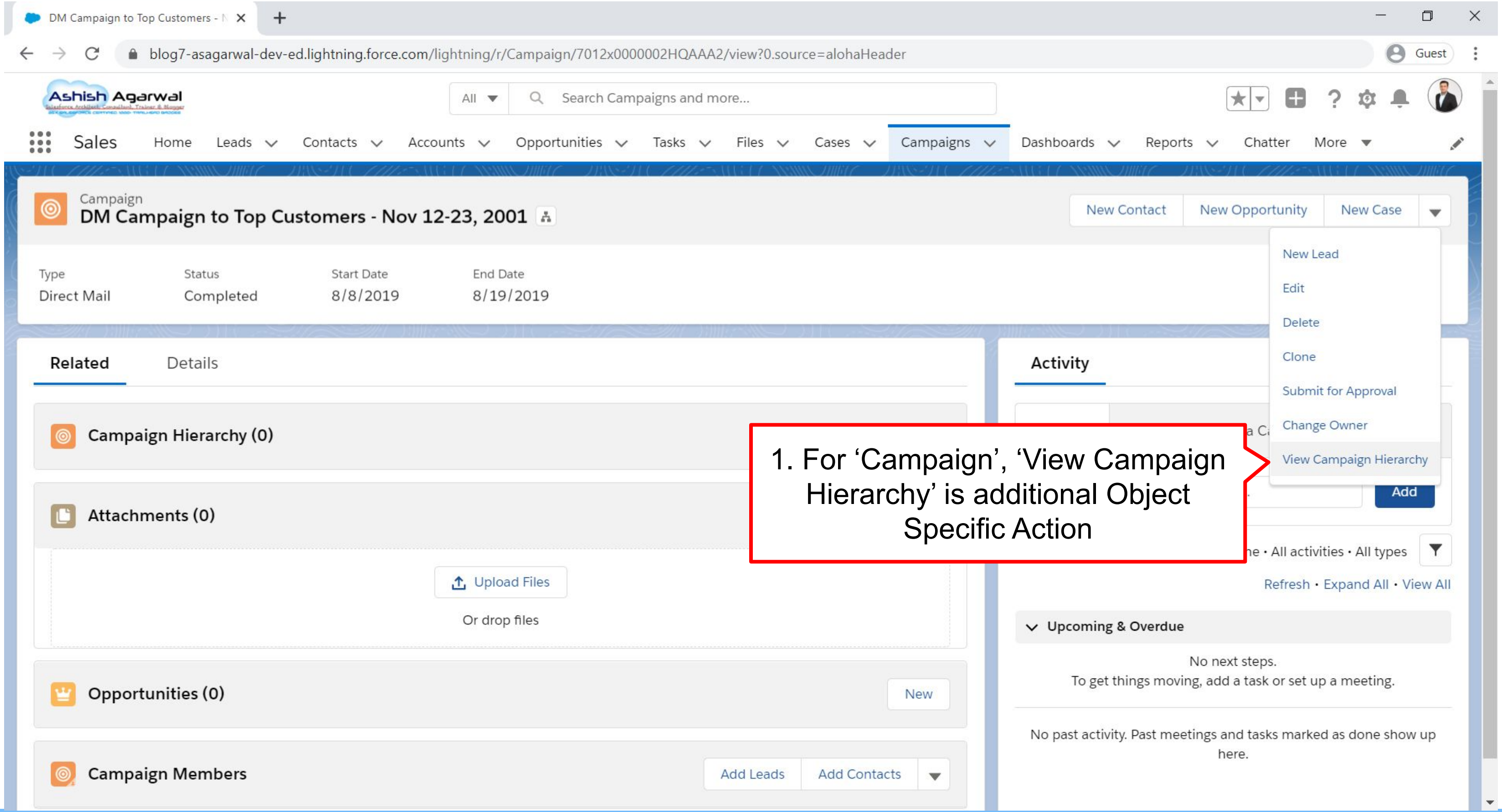
Object Specific Actions



Object Specific Actions

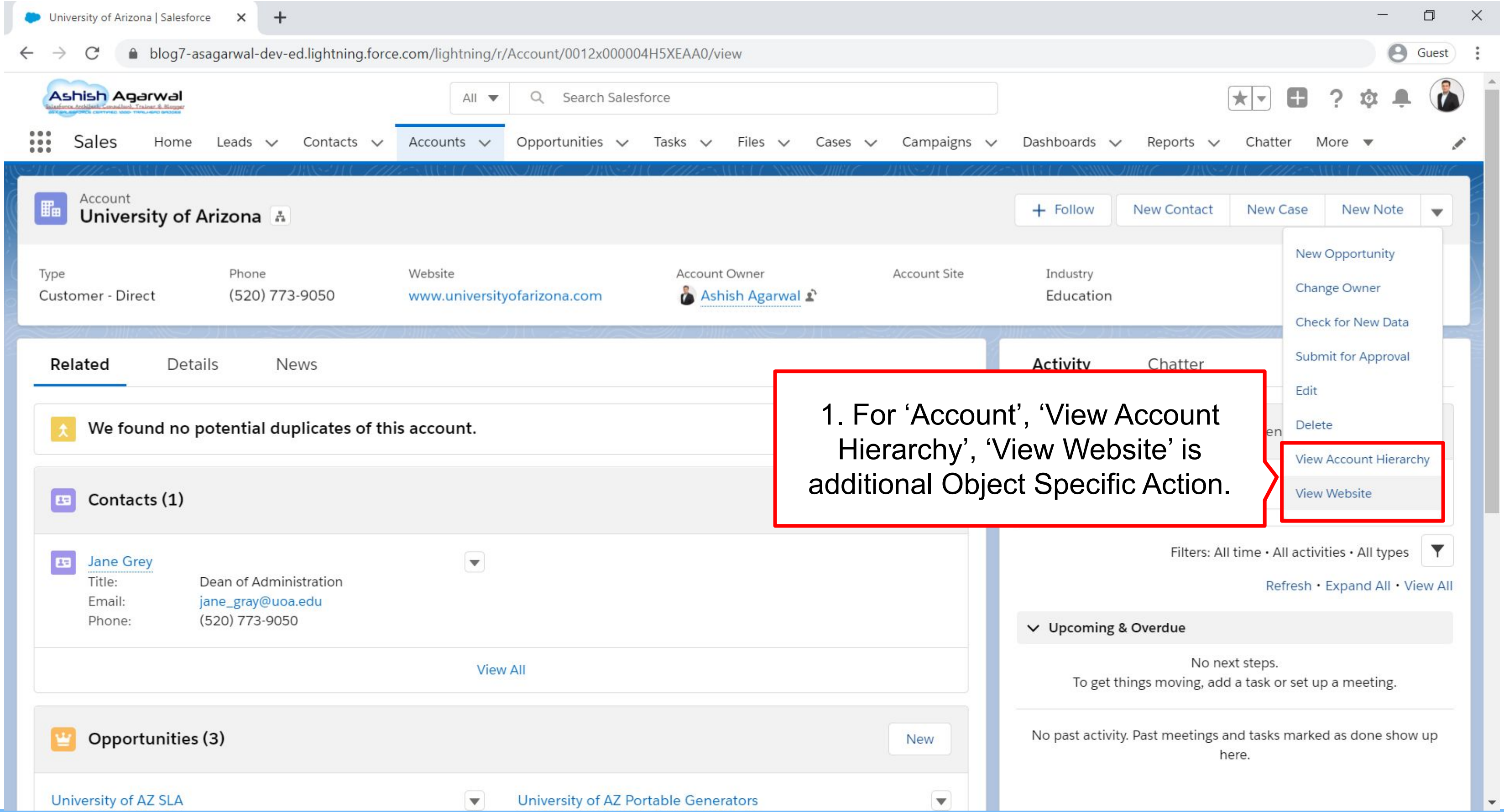


Object Specific Actions

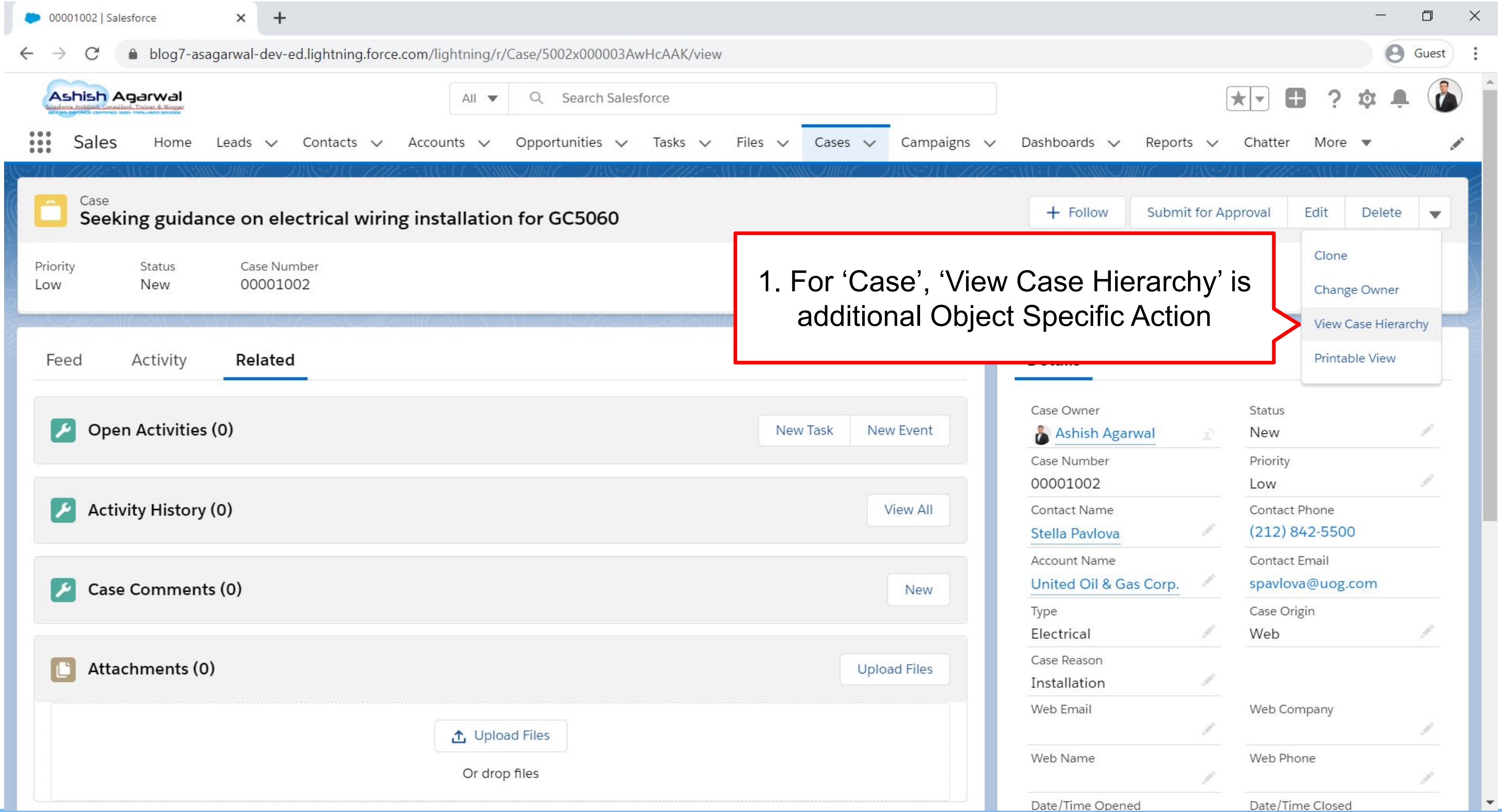


1. For 'Campaign', 'View Campaign Hierarchy' is additional Object Specific Action

Object Specific Actions



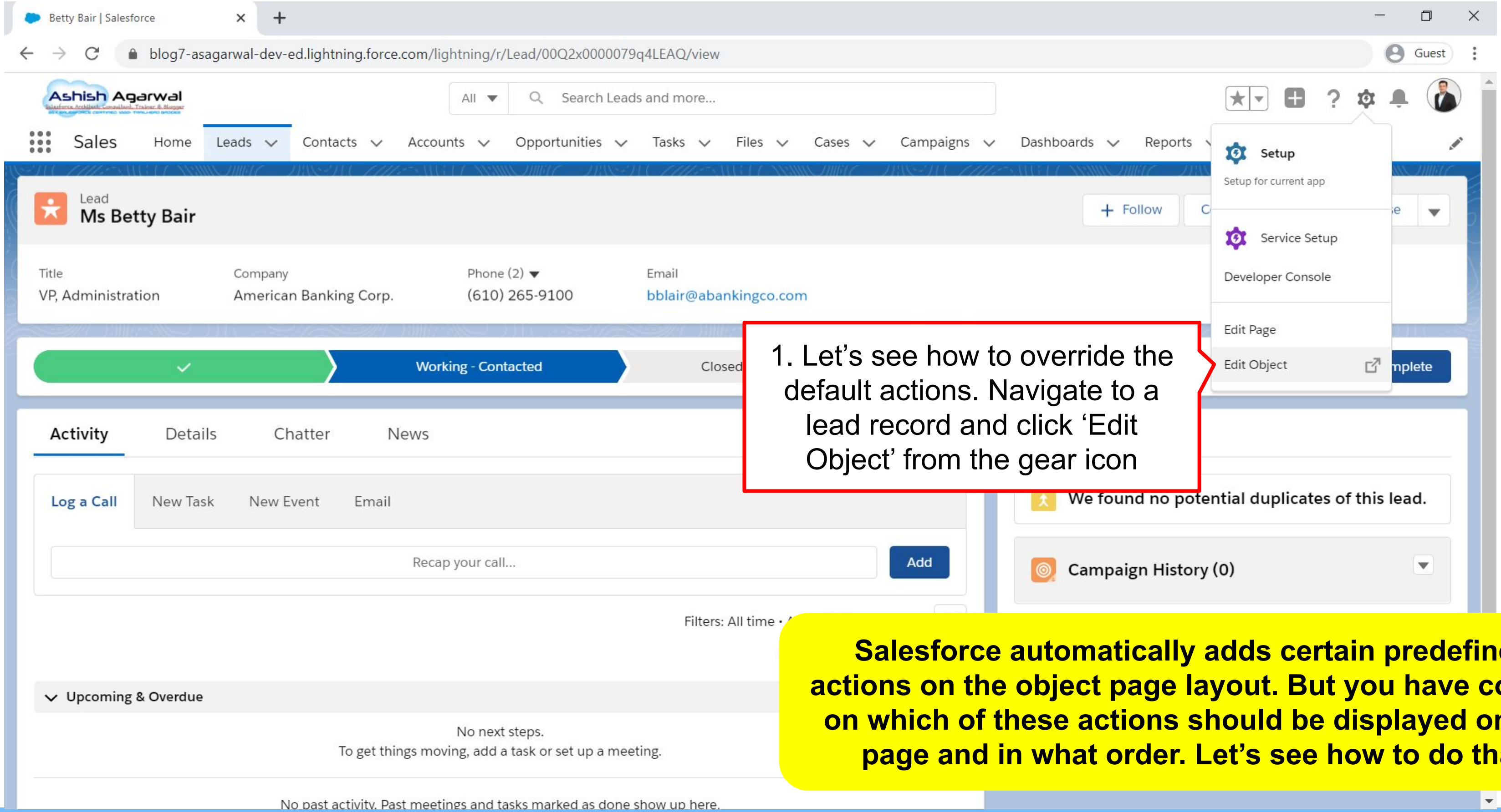
Object Specific Actions



Steps Overview

1. Create Global Action
2. Publish Global Action
3. Object Specific Actions
4. Override Predefined Actions
5. Which Action will be Displayed Where on the Page
6. Define Custom Actions

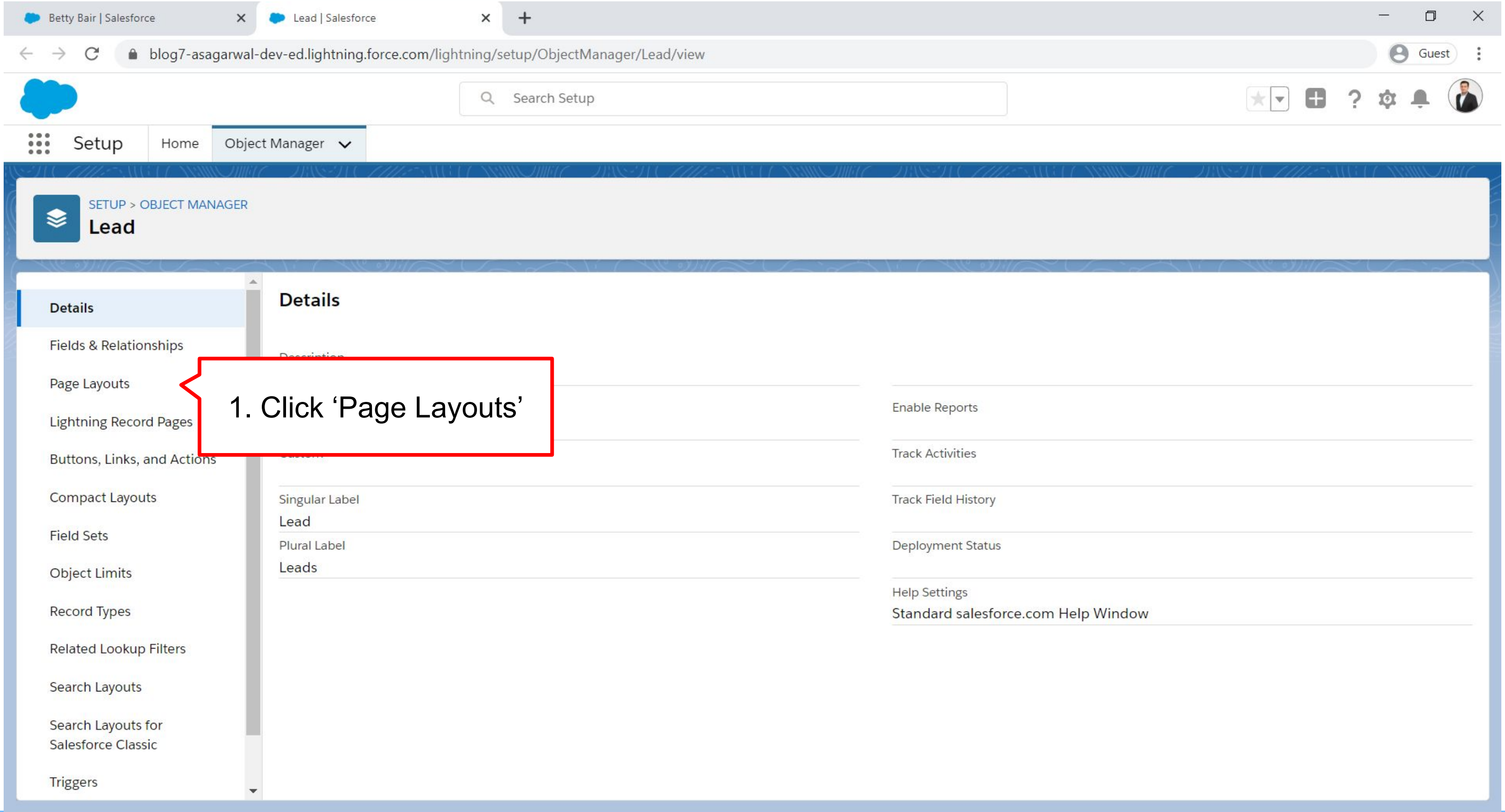
Override Predefined Actions



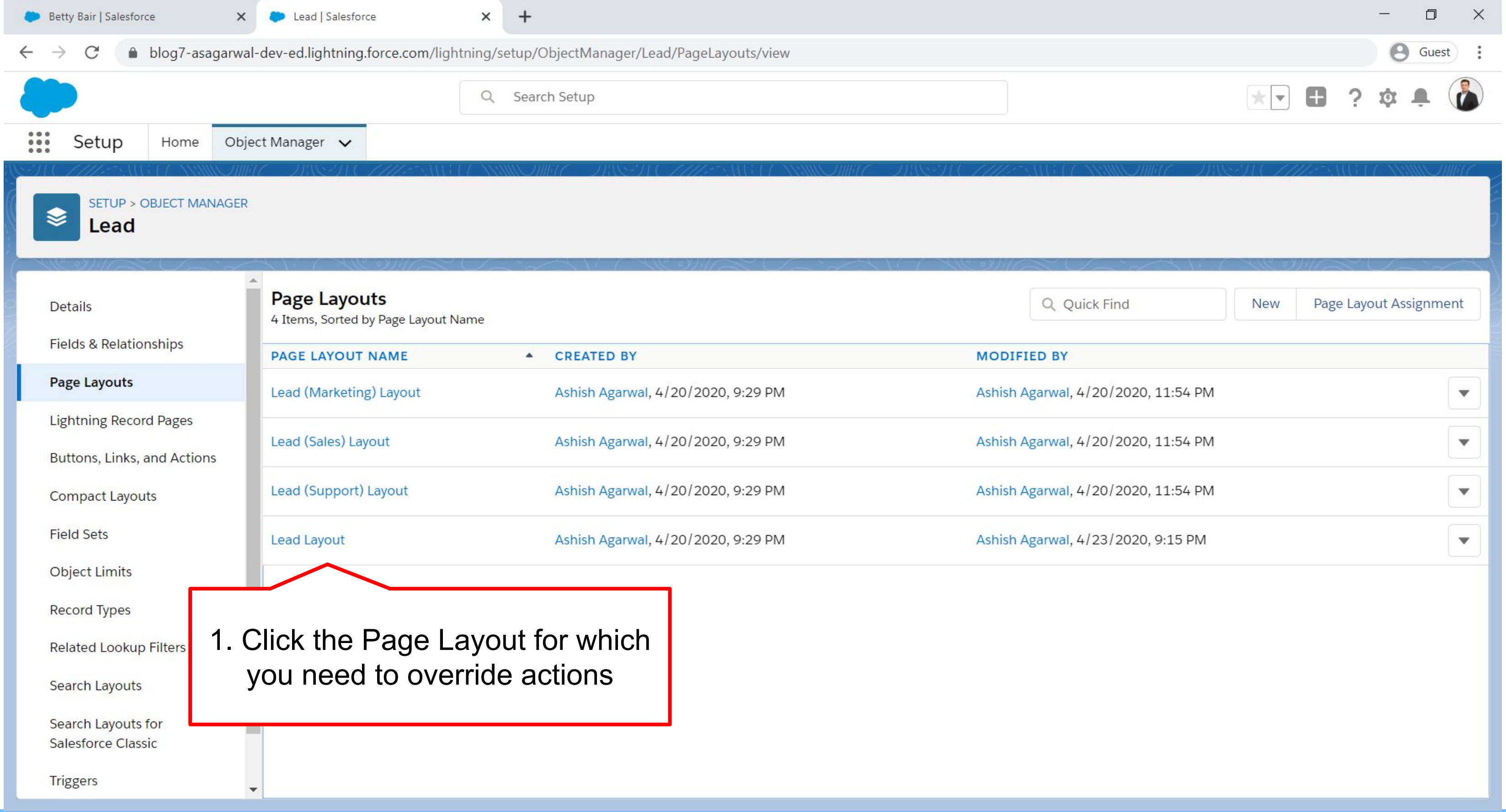
1. Let's see how to override the default actions. Navigate to a lead record and click 'Edit Object' from the gear icon

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

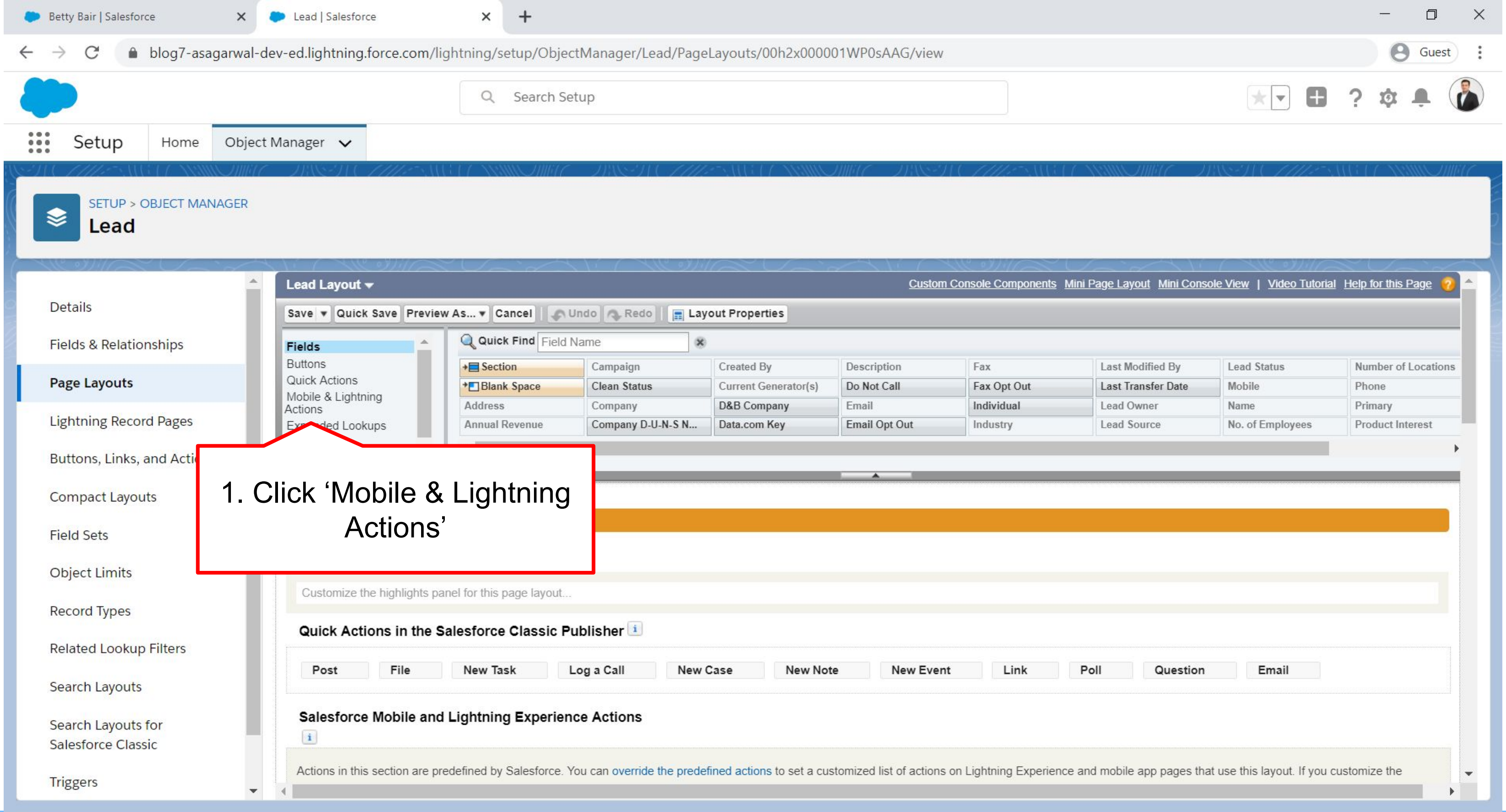
Override Predefined Actions



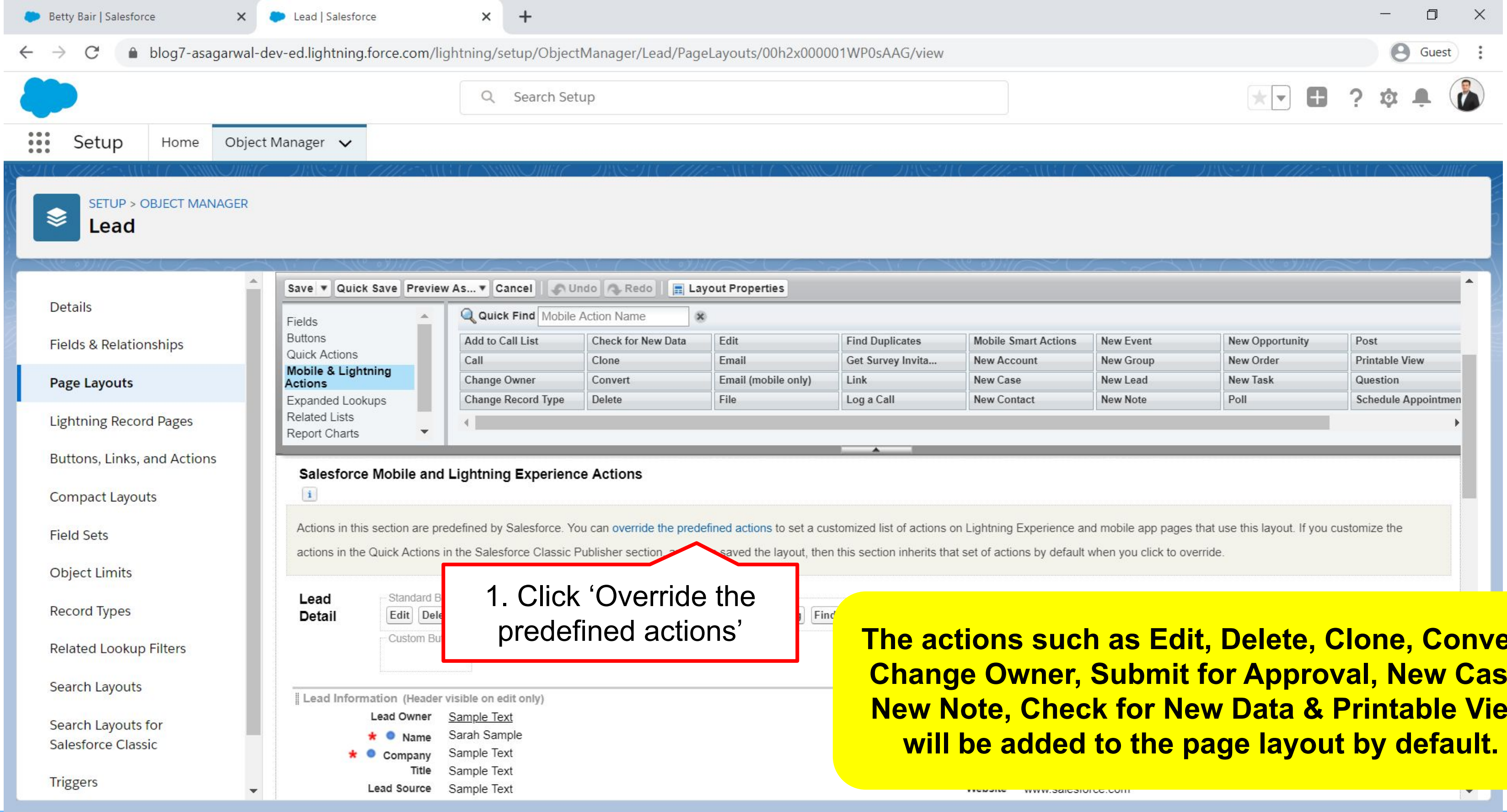
Override Predefined Actions



Override Predefined Actions



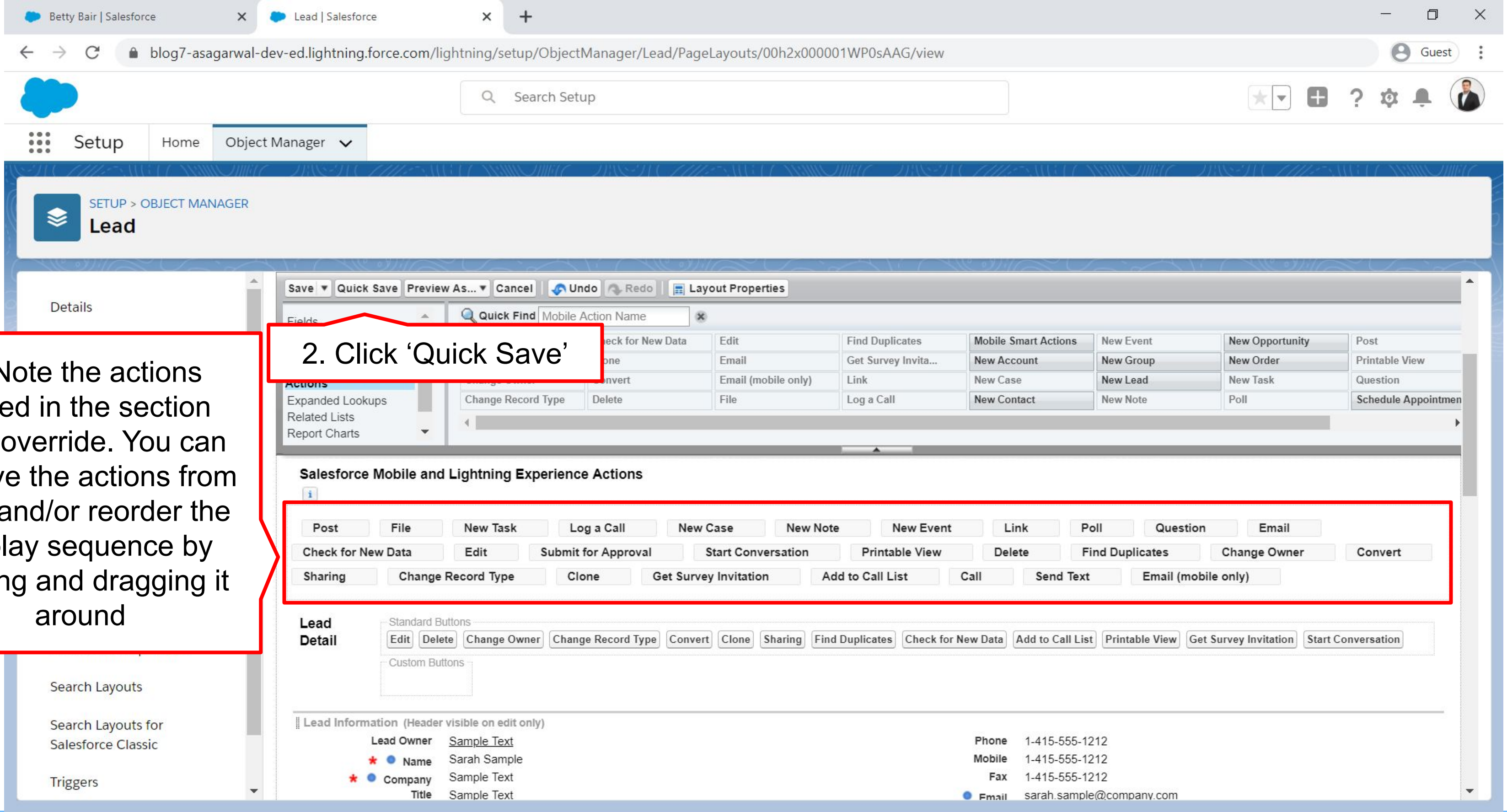
Override Predefined Actions



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.

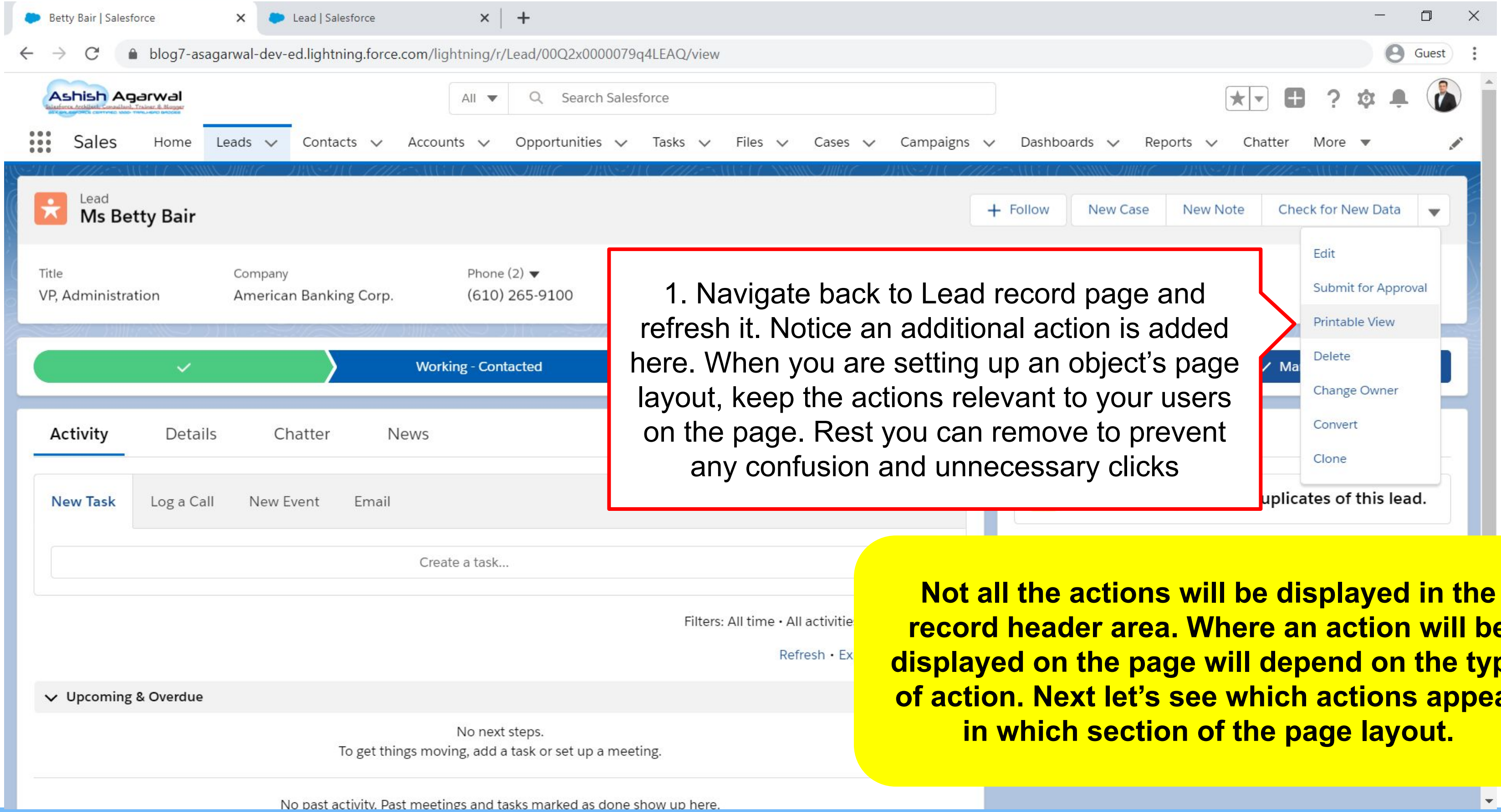
Override Predefined Actions



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'

Override Predefined Actions



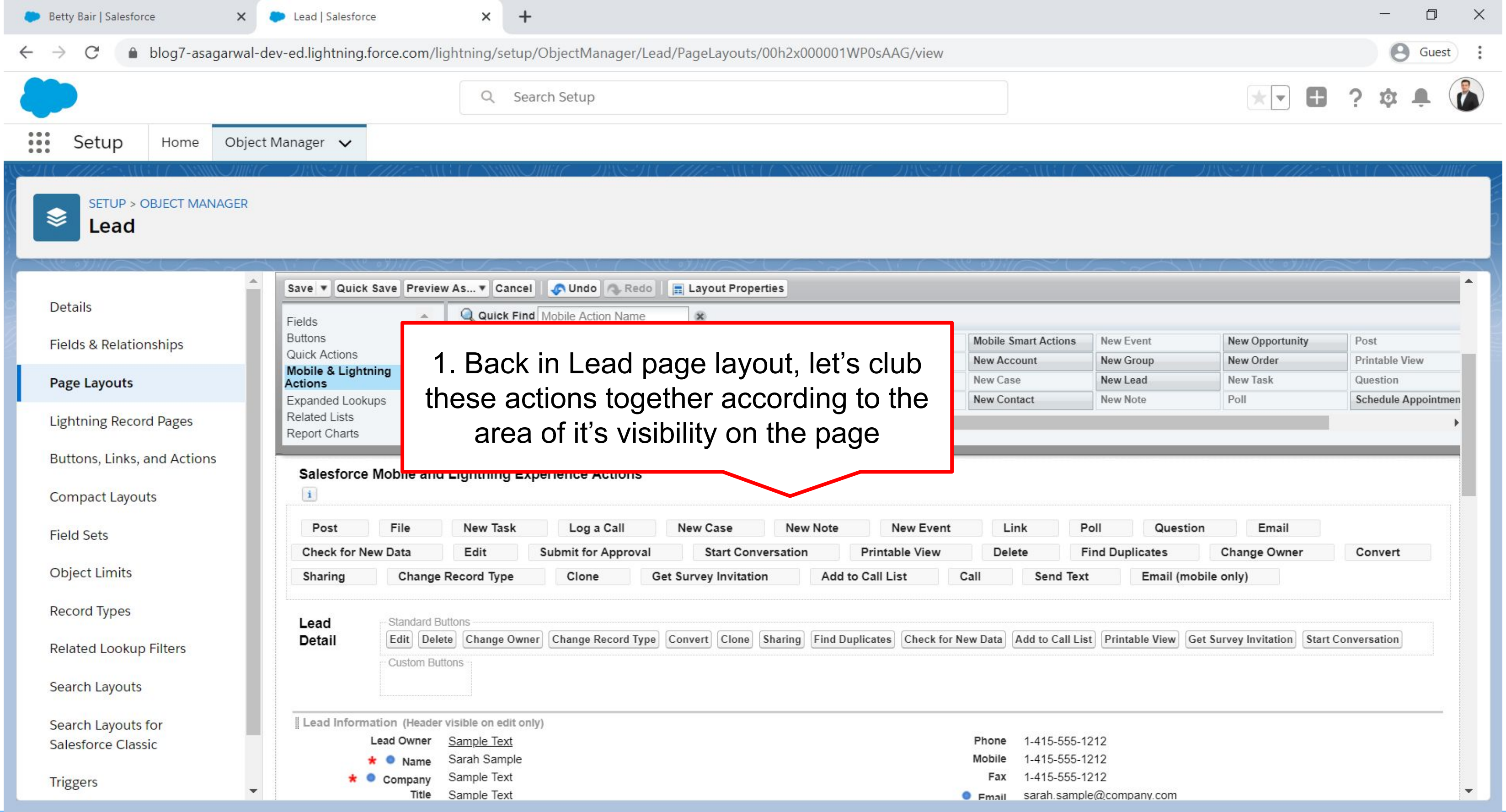
1. Navigate back to Lead record page and refresh it. Notice an additional action is added here. When you are setting up an object's page layout, keep the actions relevant to your users on the page. Rest you can remove to prevent any confusion and unnecessary clicks

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.

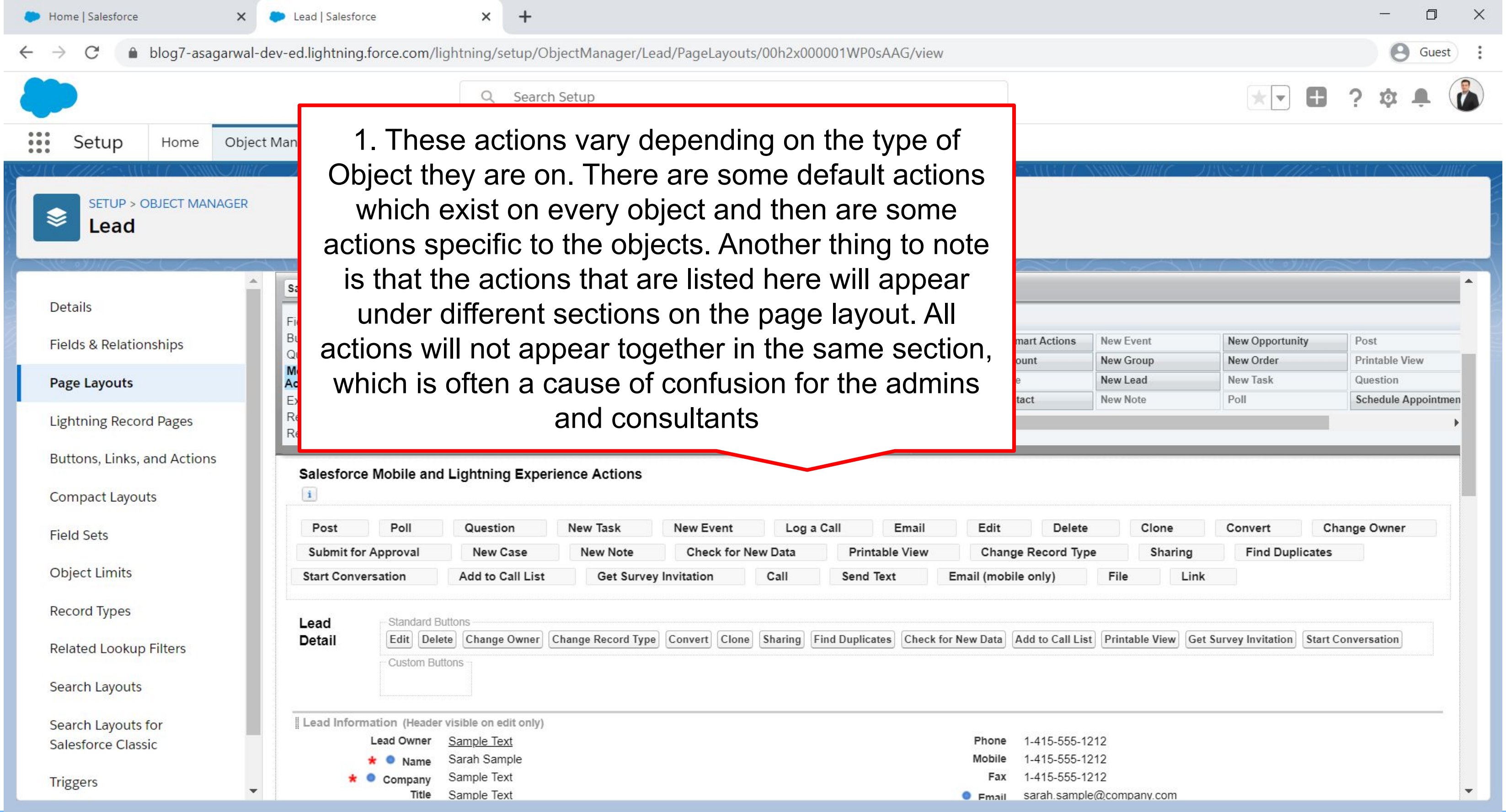
Steps Overview

1. Create Global Action
2. Publish Global Action
3. Object Specific Actions
4. Override Predefined Actions
5. Which Action will be Displayed Where on the Page
6. Define Custom Actions

Which Action will be Displayed Where on the Page

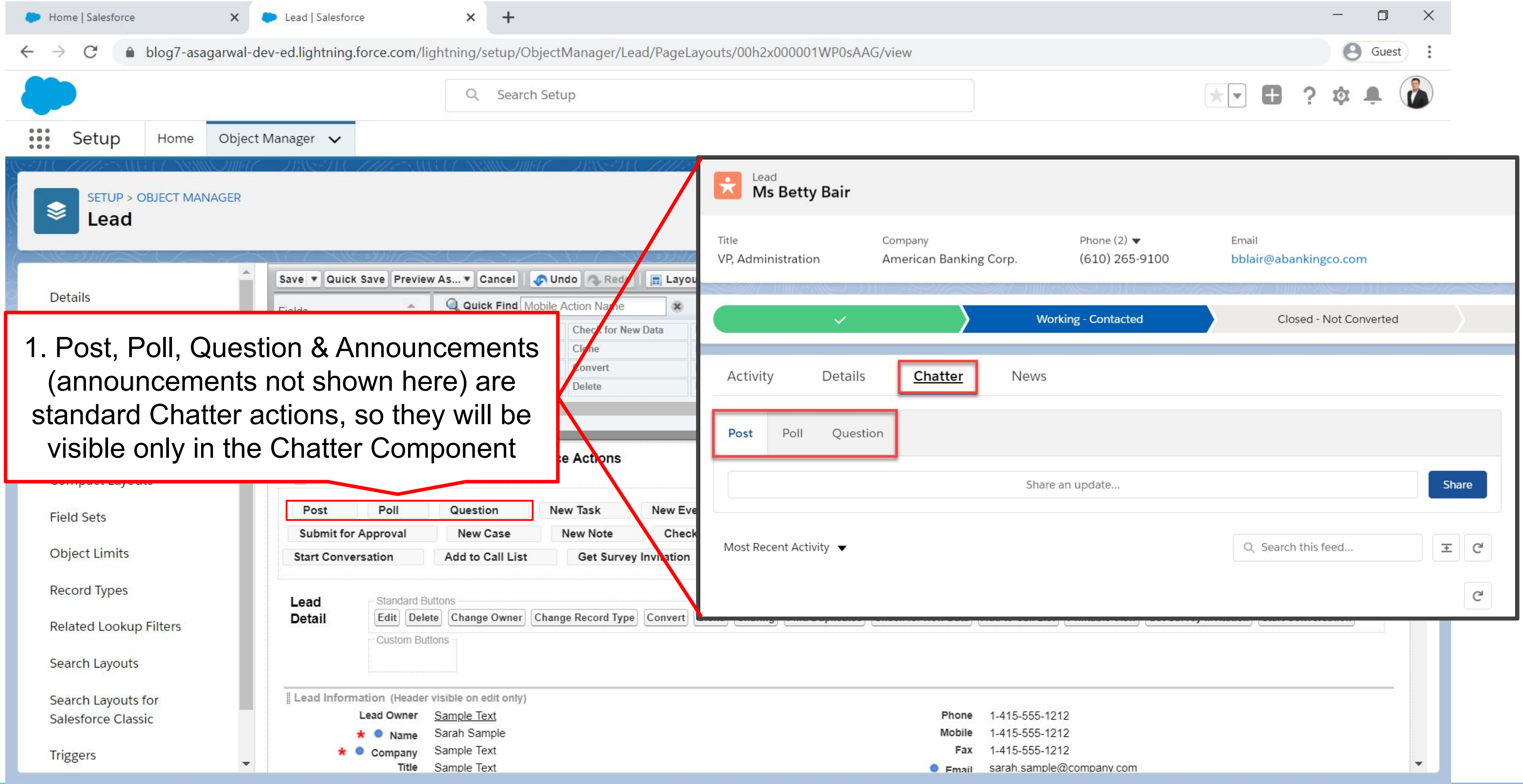


Which Action will be Displayed Where on the Page



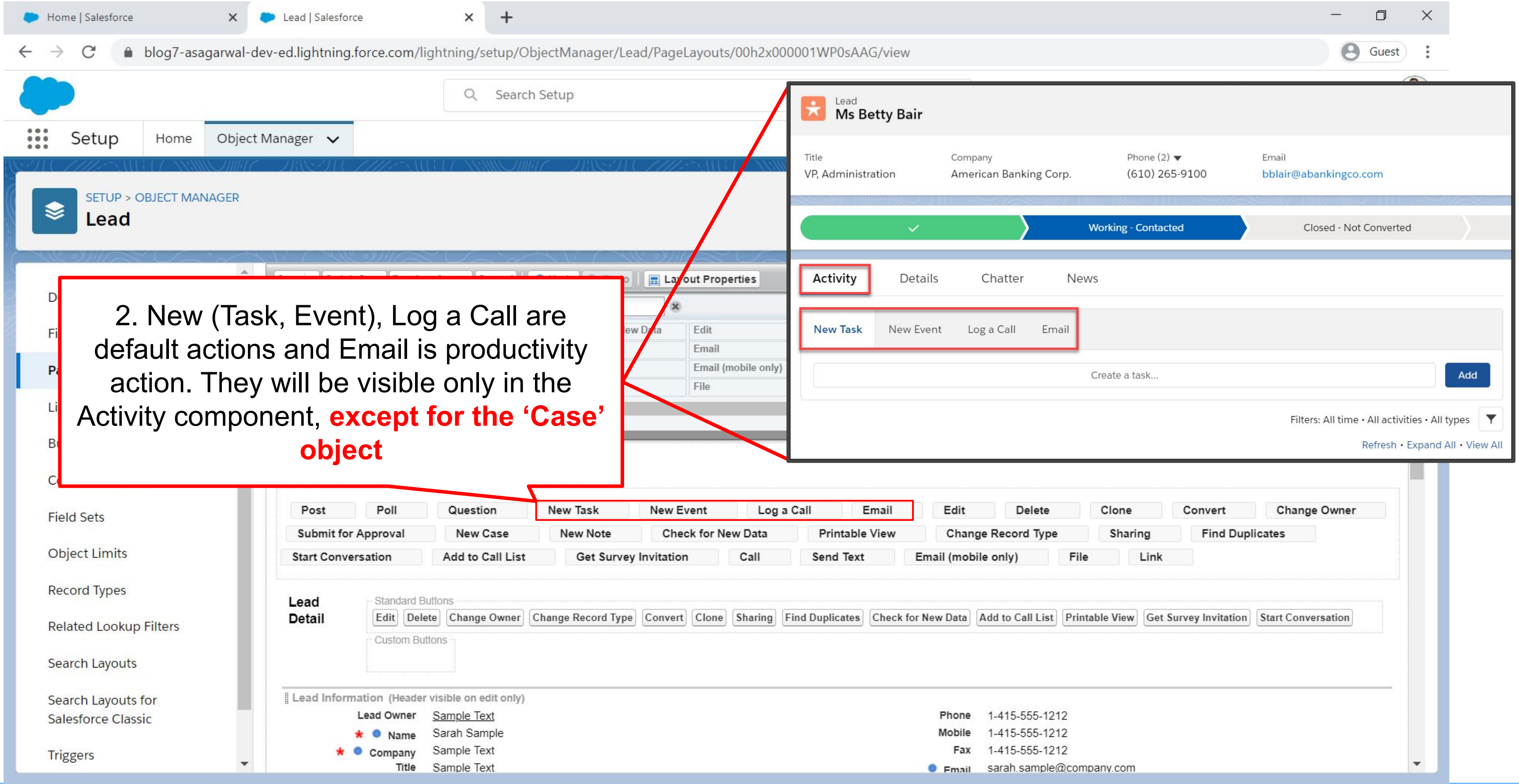
1. These actions vary depending on the type of Object they are on. There are some default actions which exist on every object and then are some actions specific to the objects. Another thing to note is that the actions that are listed here will appear under different sections on the page layout. All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

Which Action will be Displayed Where on the Page



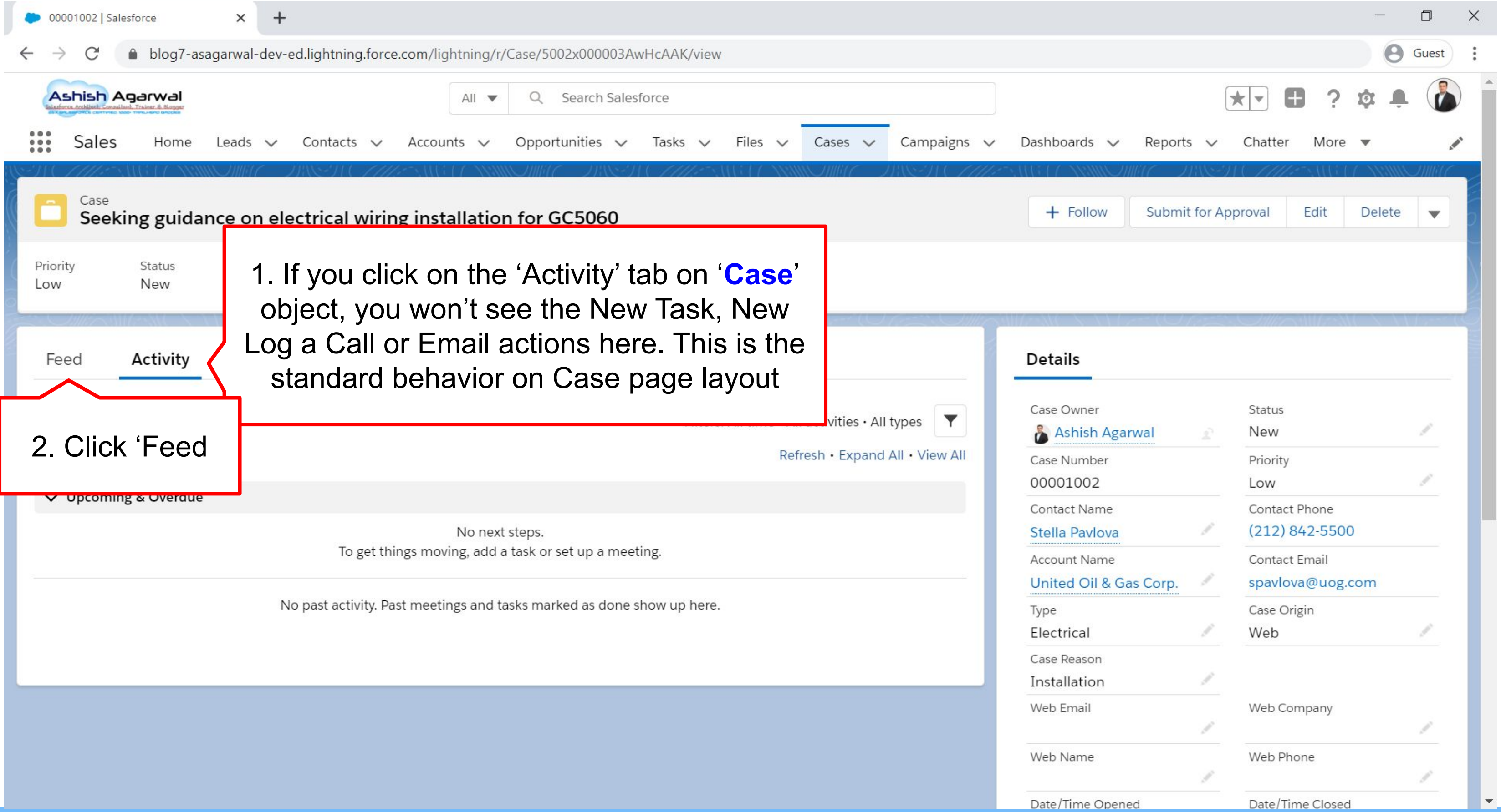
1. Post, Poll, Question & Announcements (announcements not shown here) are standard Chatter actions, so they will be visible only in the Chatter Component

Which Action will be Displayed Where on the Page

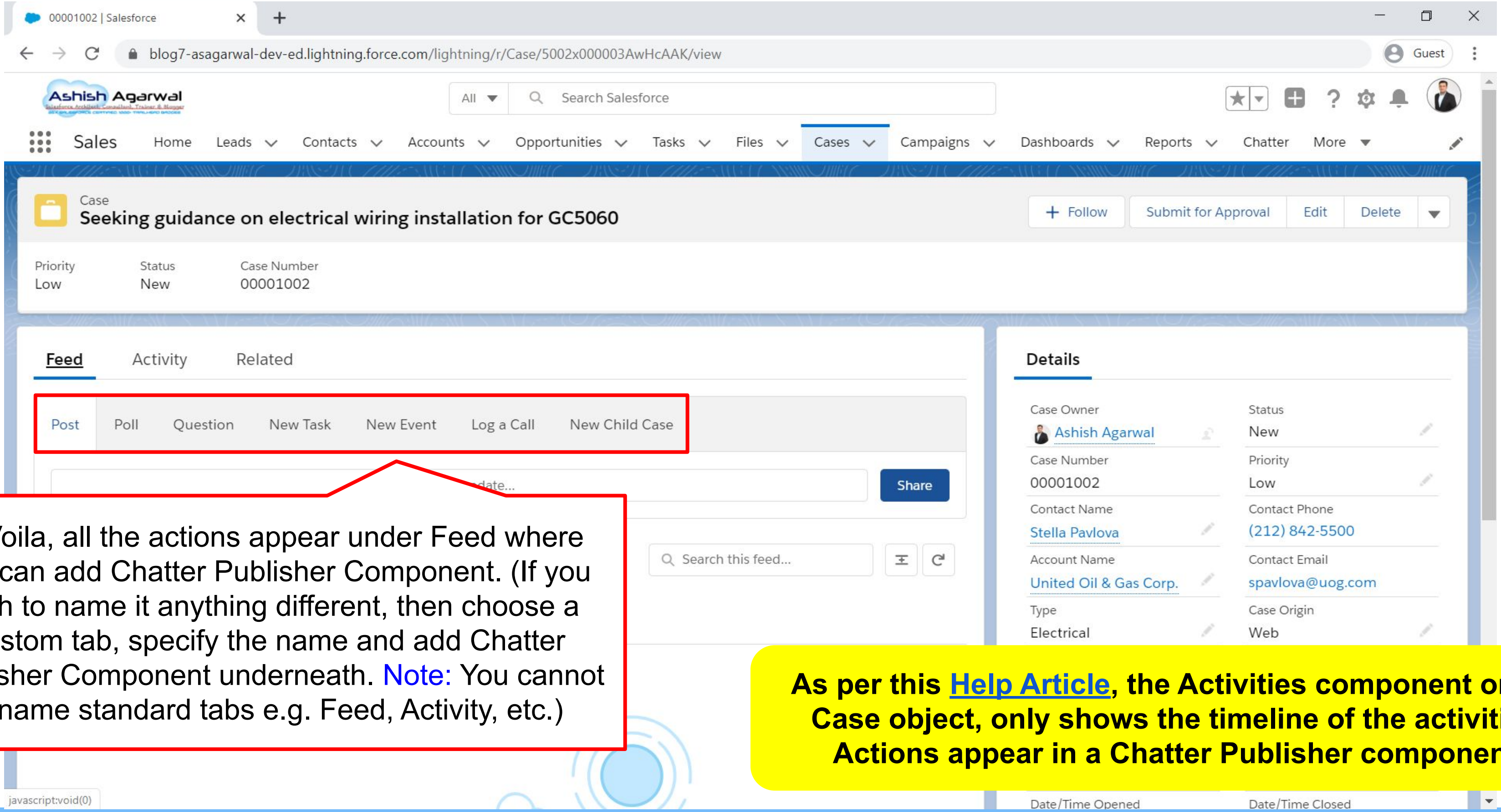


2. New (Task, Event), Log a Call are default actions and Email is productivity action. They will be visible only in the Activity component, **except for the 'Case' object**

Which Action will be Displayed Where on the Page



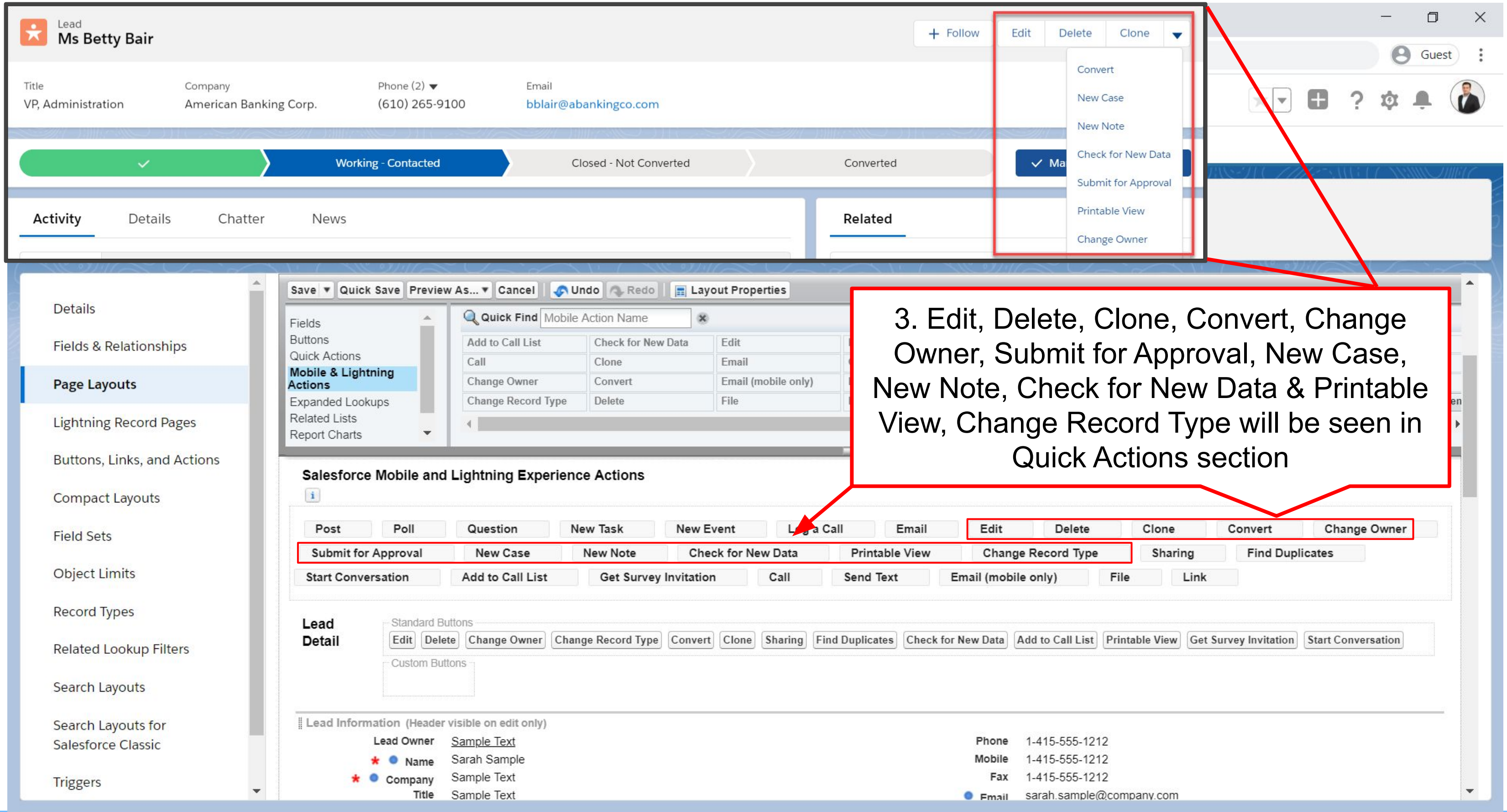
Which Action will be Displayed Where on the Page



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.)

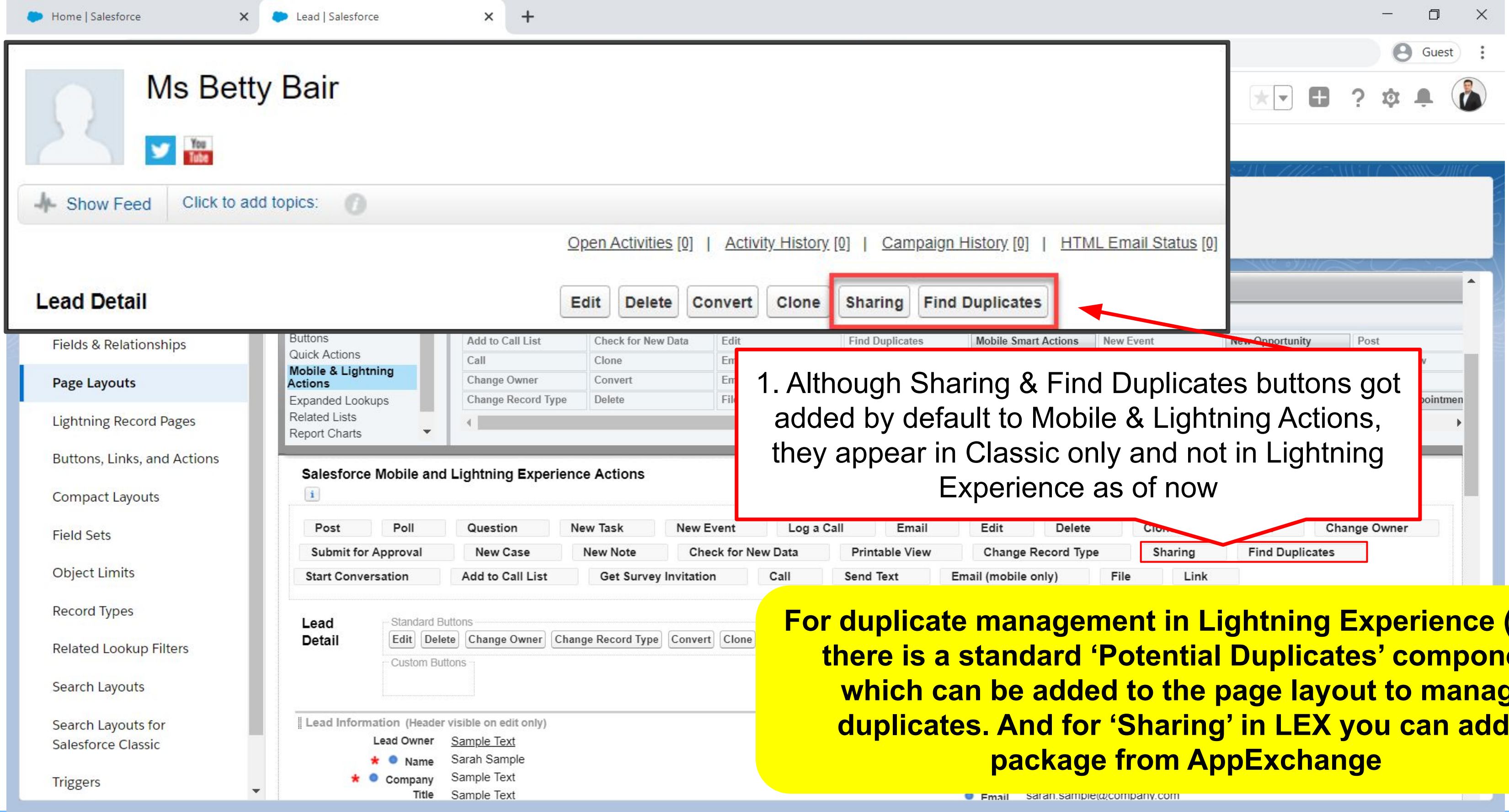
As per this Help Article, the Activities component on the Case object, only shows the timeline of the activities. Actions appear in a Chatter Publisher component.

Which Action will be Displayed Where on the Page



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

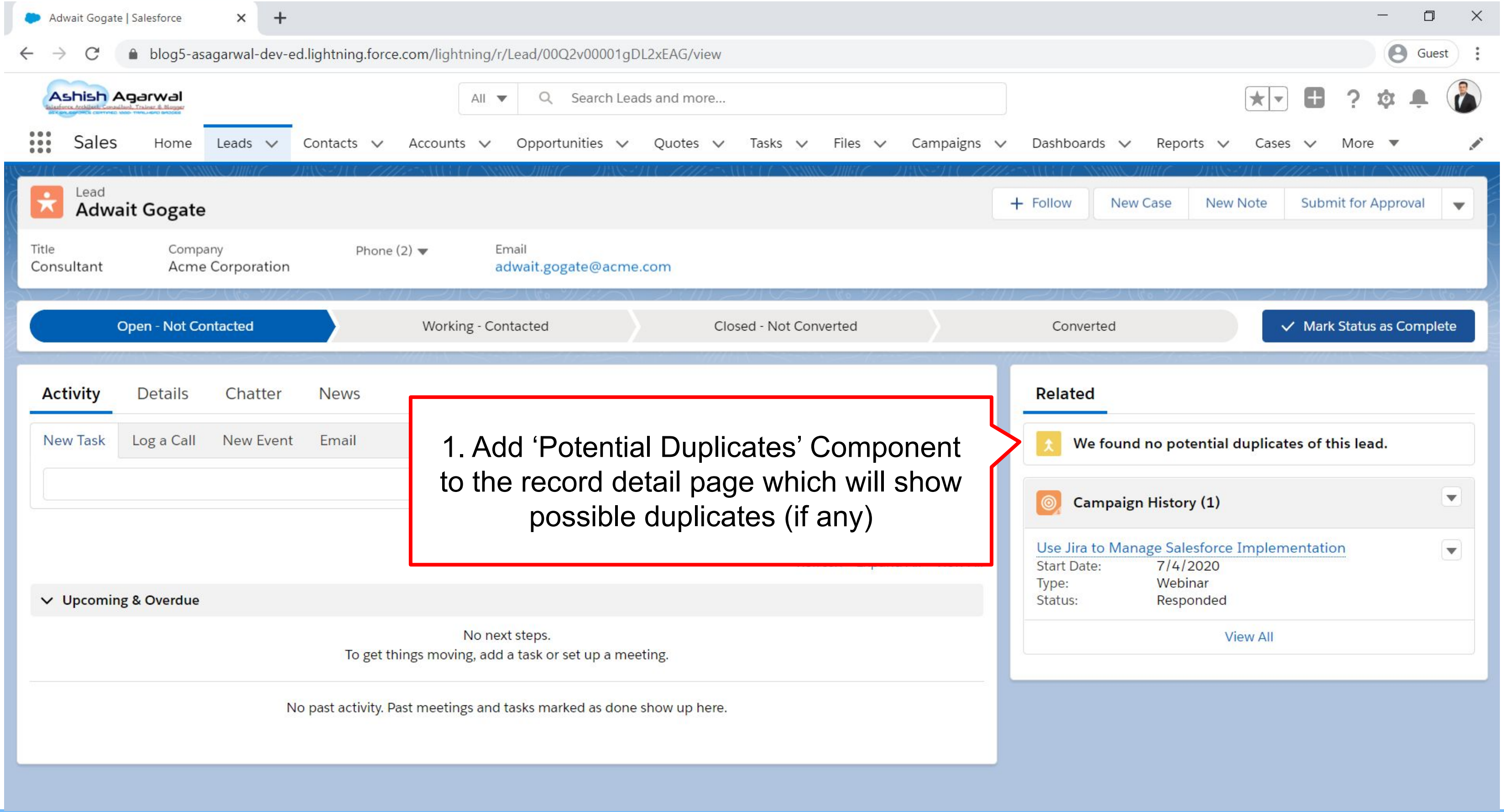
Which Action will be Displayed Where on the Page



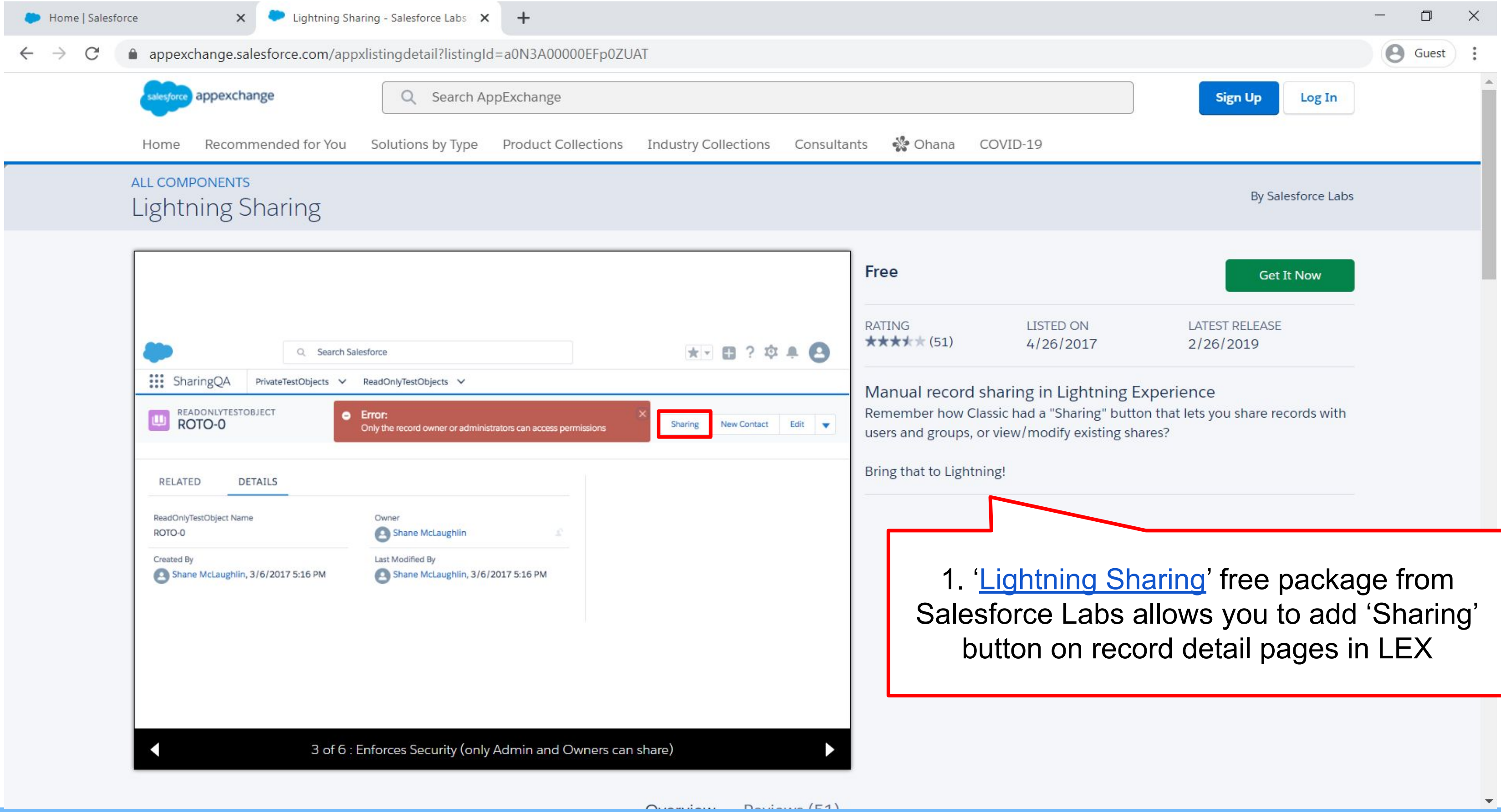
1. Although Sharing & Find Duplicates buttons got added by default to Mobile & Lightning Actions, they appear in Classic only and not in Lightning Experience as of now

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

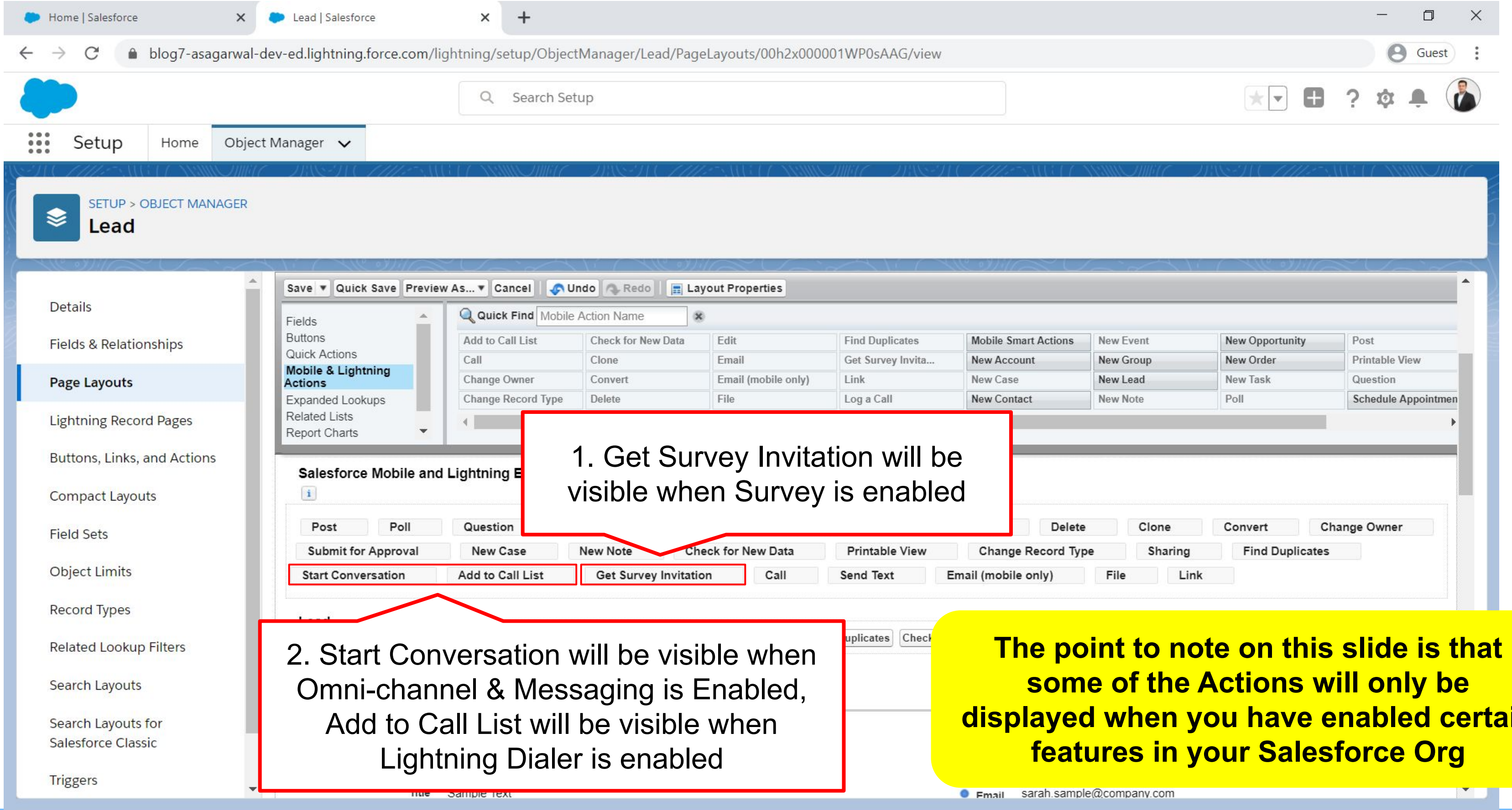


Which Action will be Displayed Where on the Page



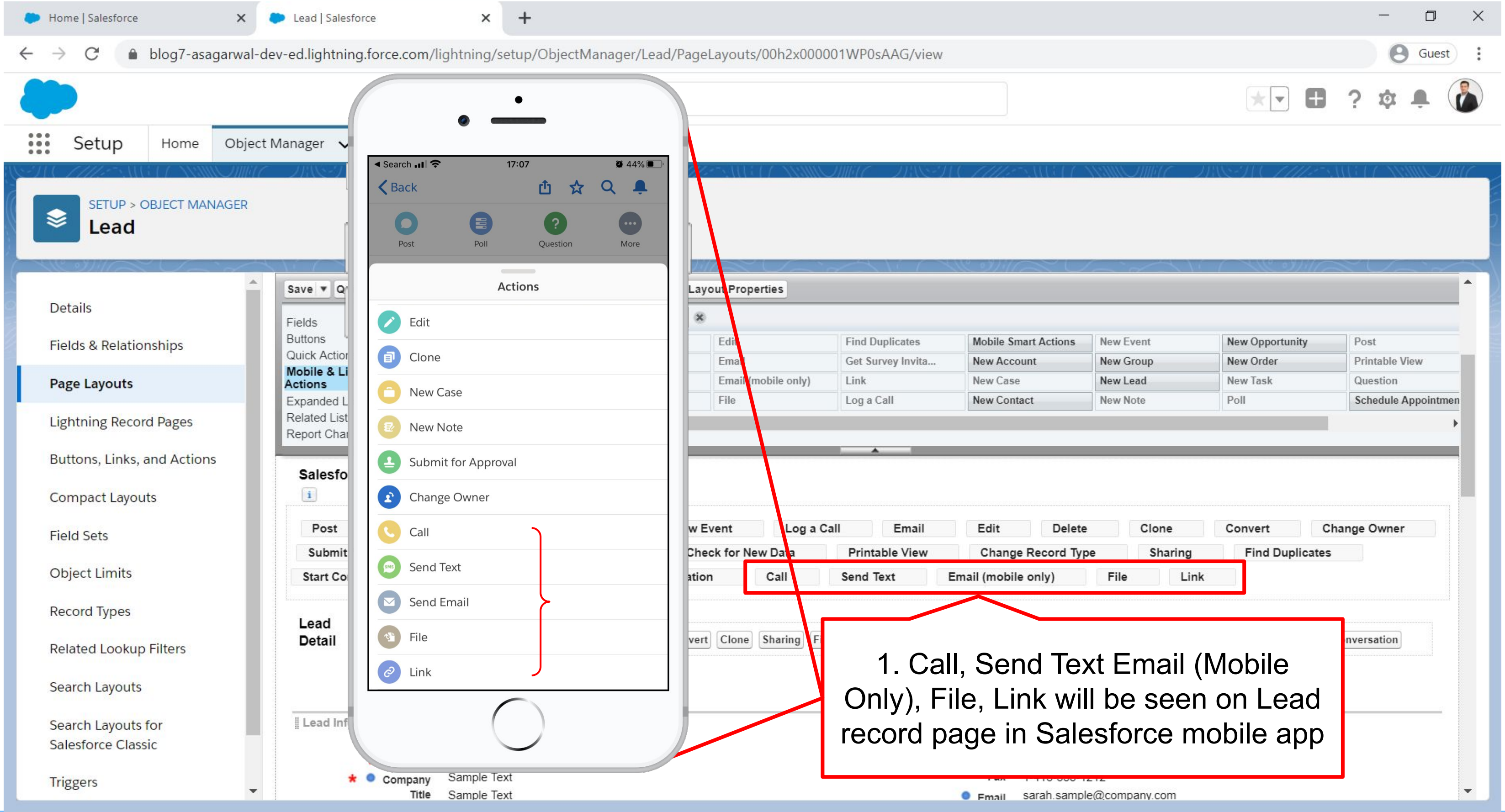
1. '[Lightning Sharing]' free package from Salesforce Labs allows you to add 'Sharing' button on record detail pages in LEX

Which Action will be Displayed Where on the Page



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

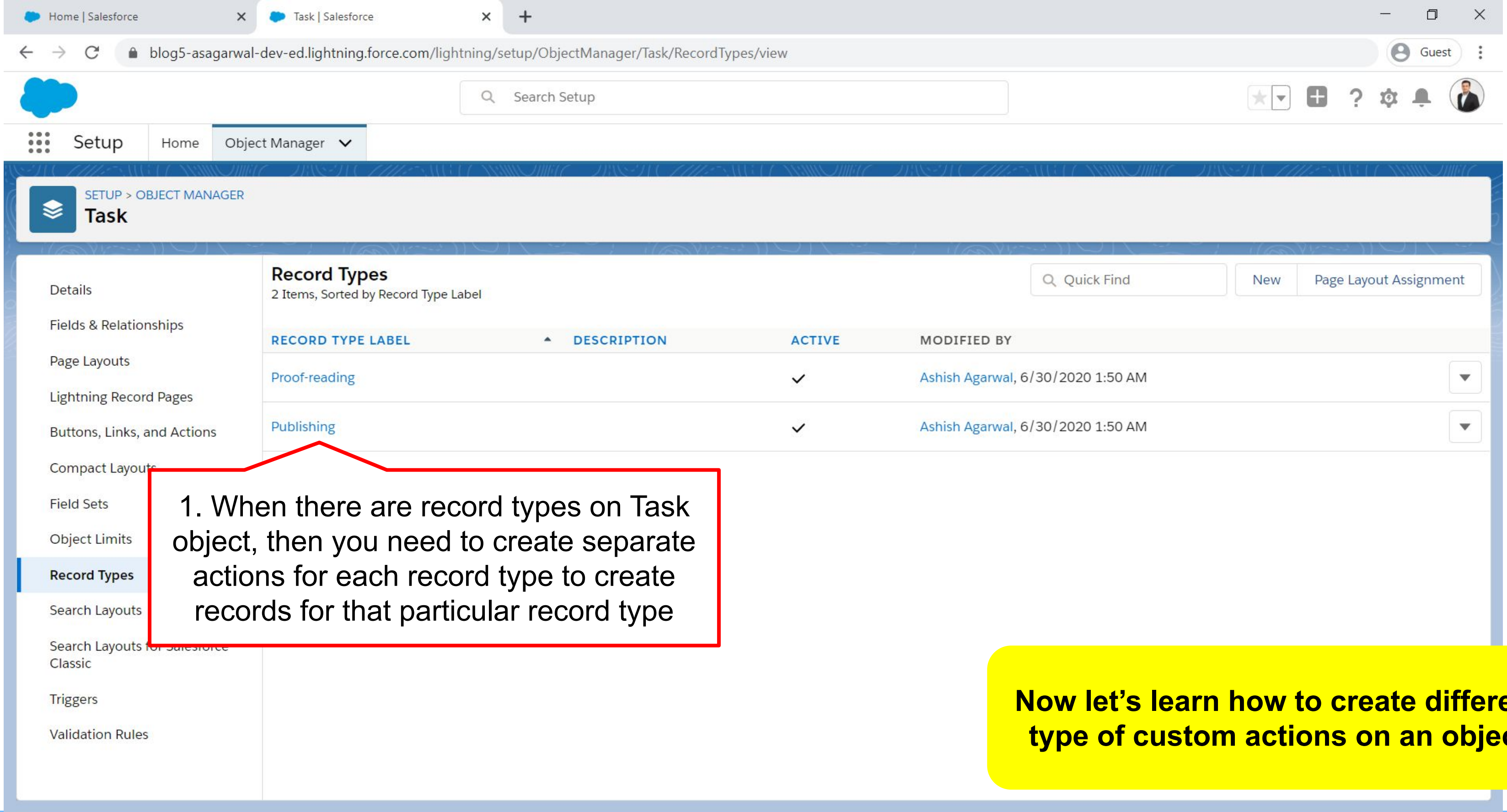


1. Call, Send Text Email (Mobile Only), File, Link will be seen on Lead record page in Salesforce mobile app

Steps Overview

1. Create Global Action
2. Publish Global Action
3. Object Specific Actions
4. Override Predefined Actions
5. Which Action will be Displayed Where on the Page
6. Define Custom Actions

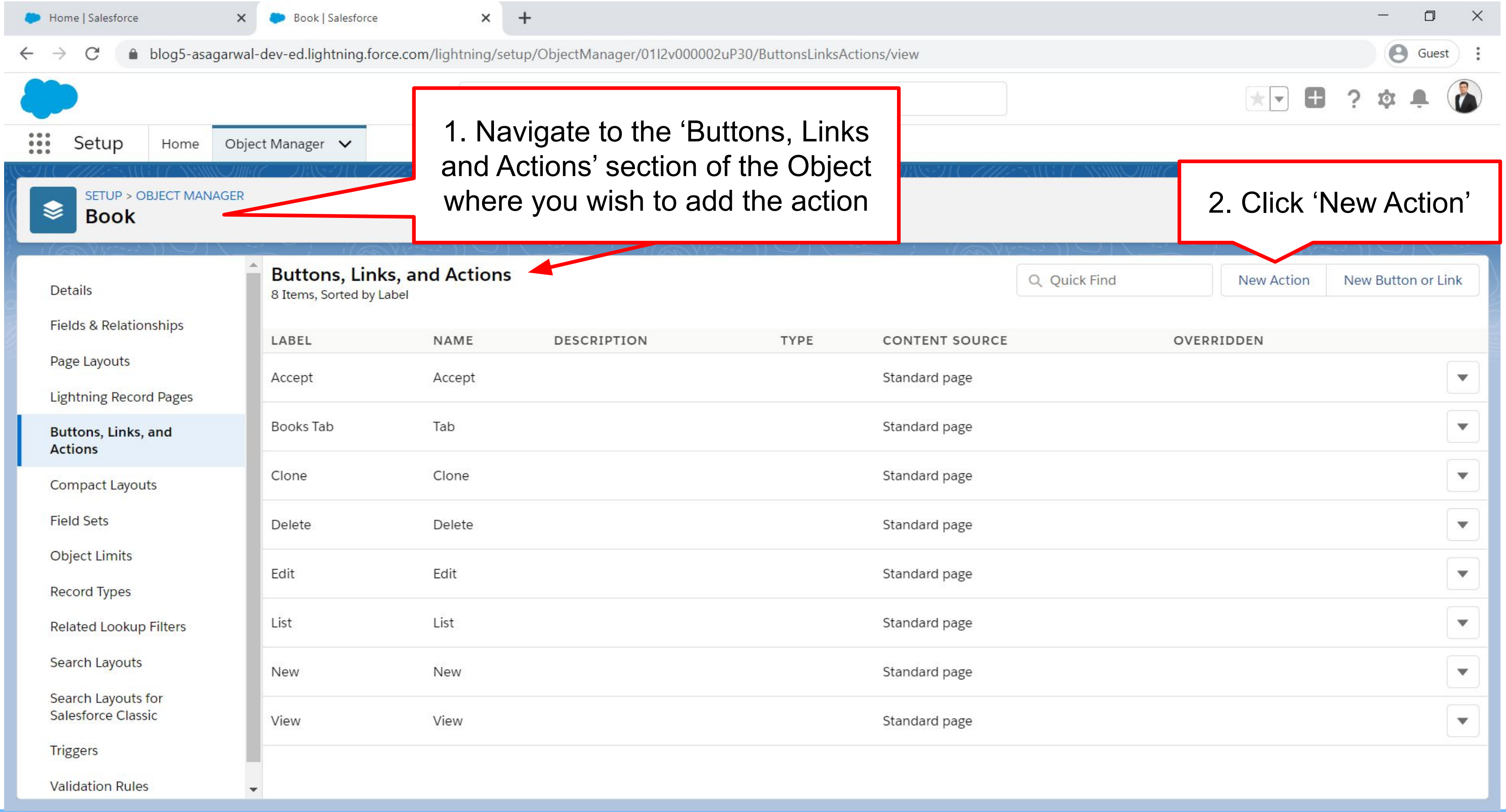
Custom Actions - Declarative



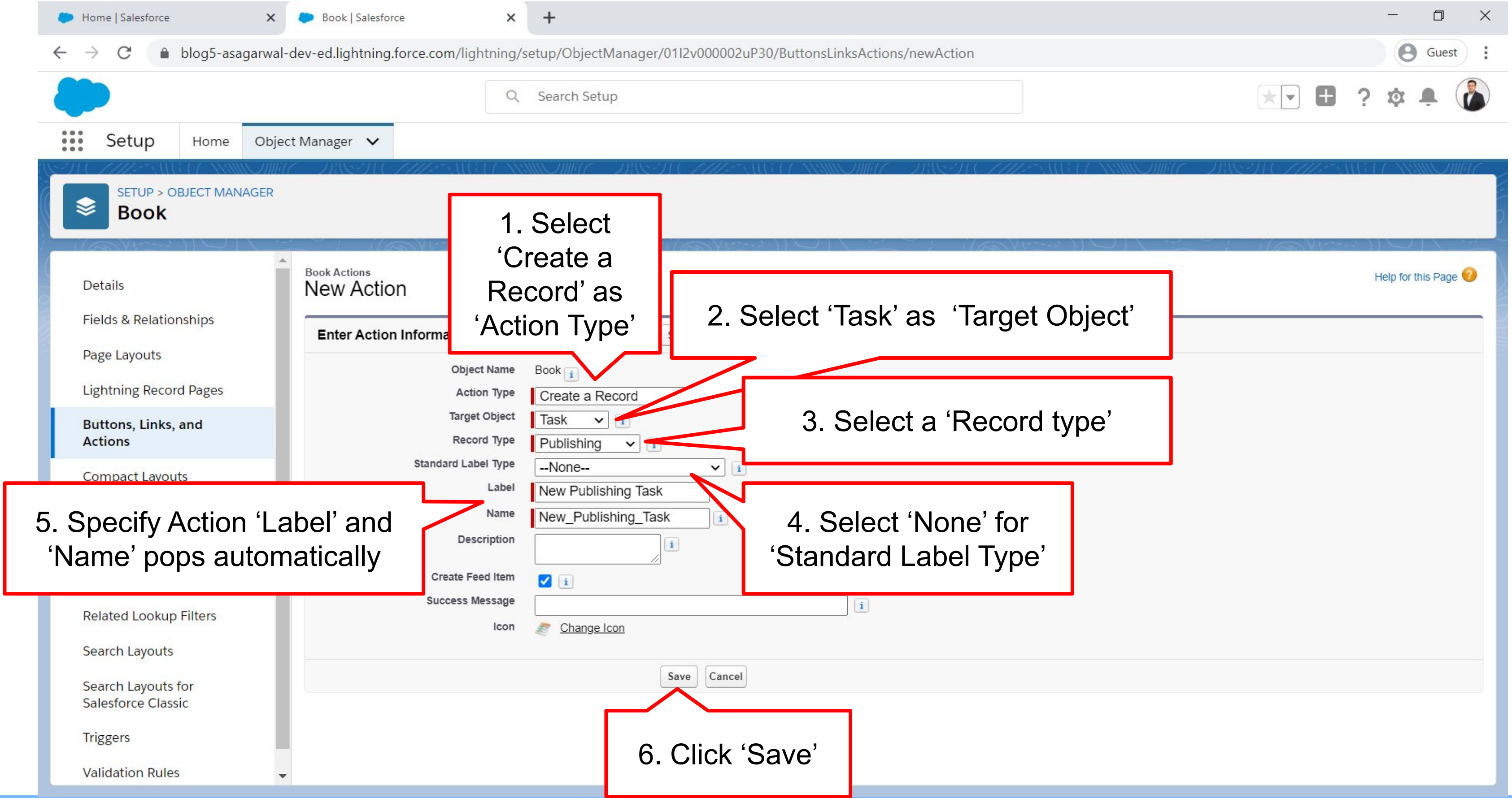
1. When there are record types on Task object, then you need to create separate actions for each record type to create records for that particular record type

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

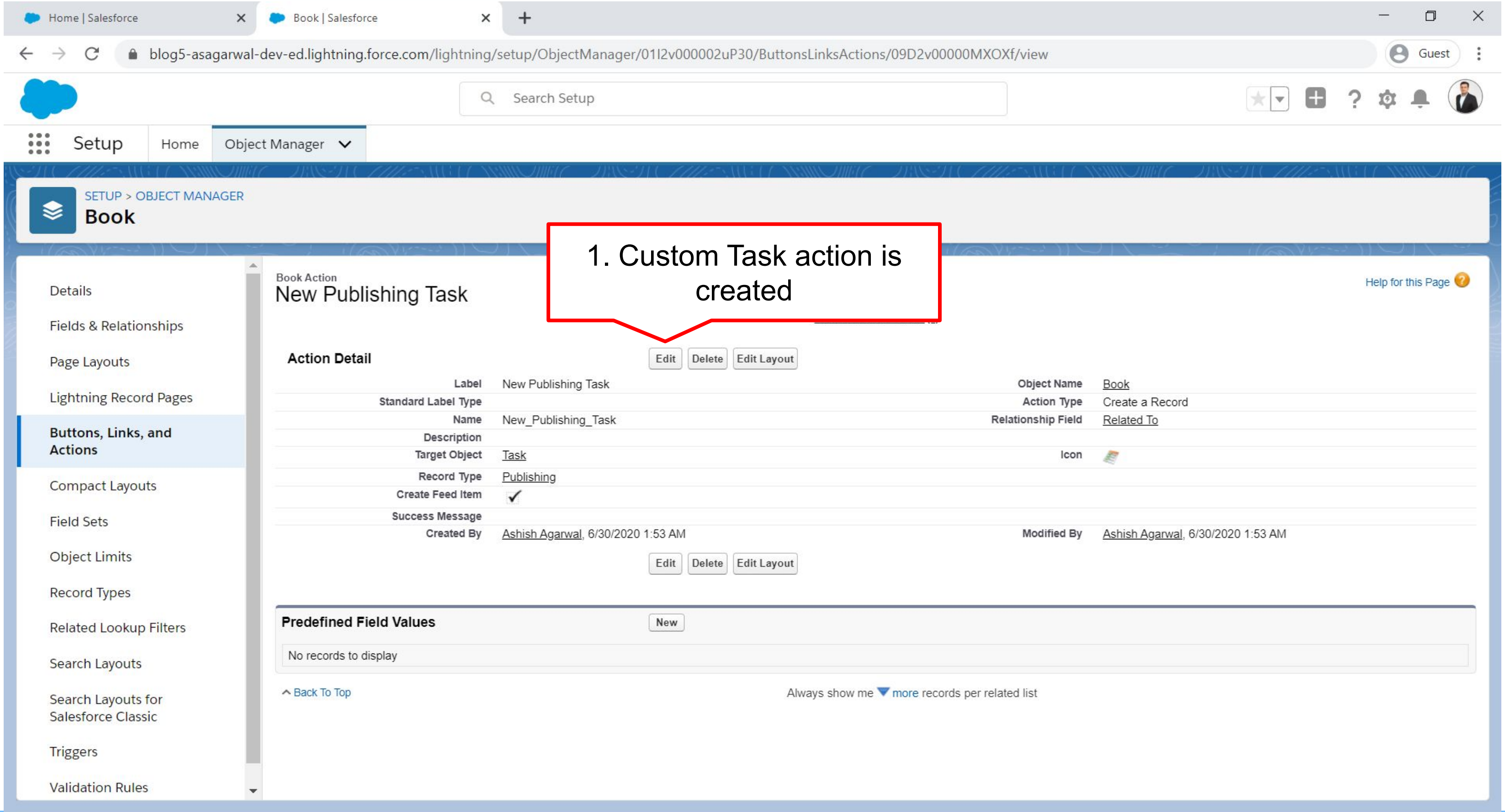
Custom Actions - Declarative



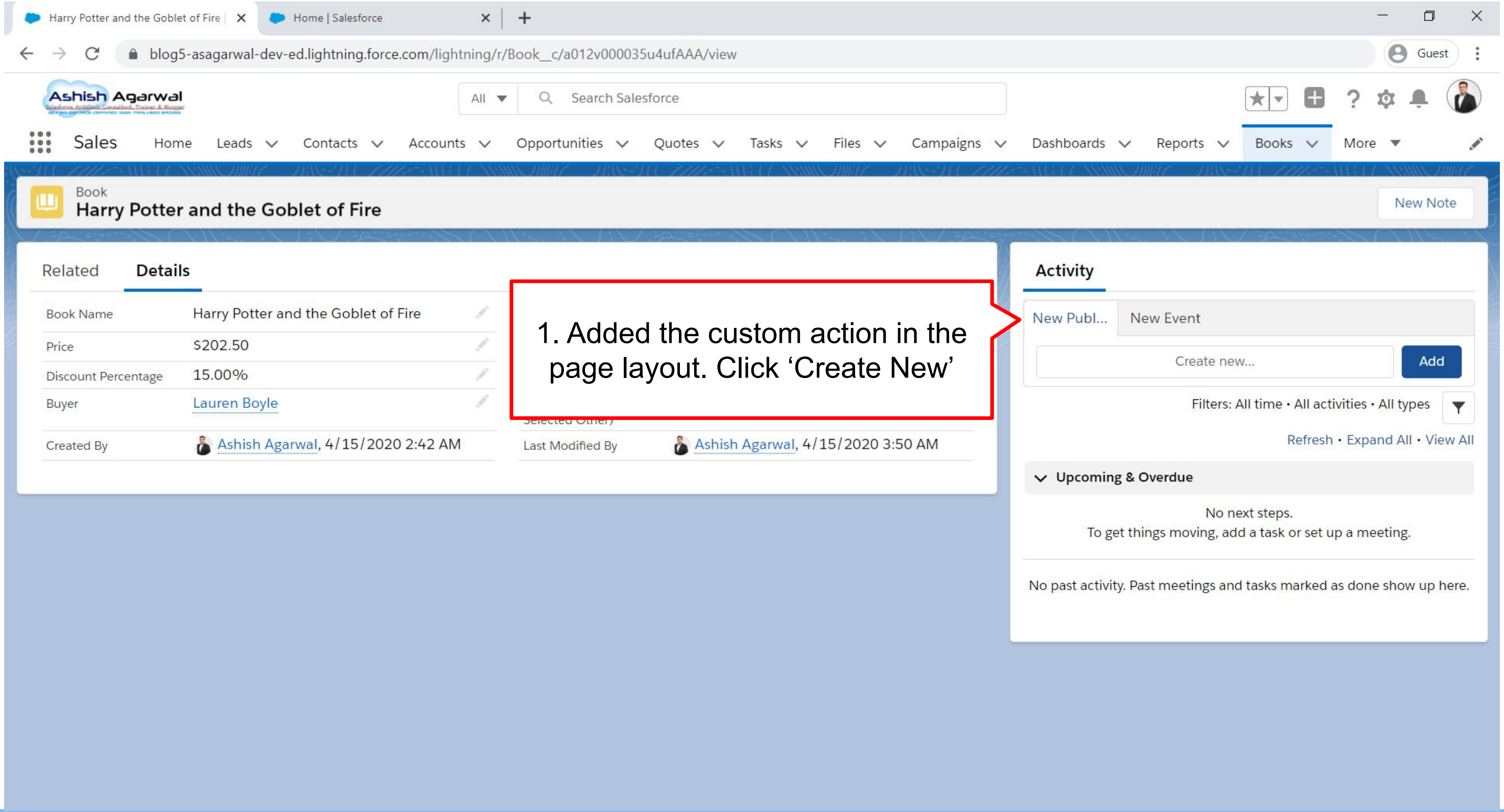
Custom Actions - Declarative



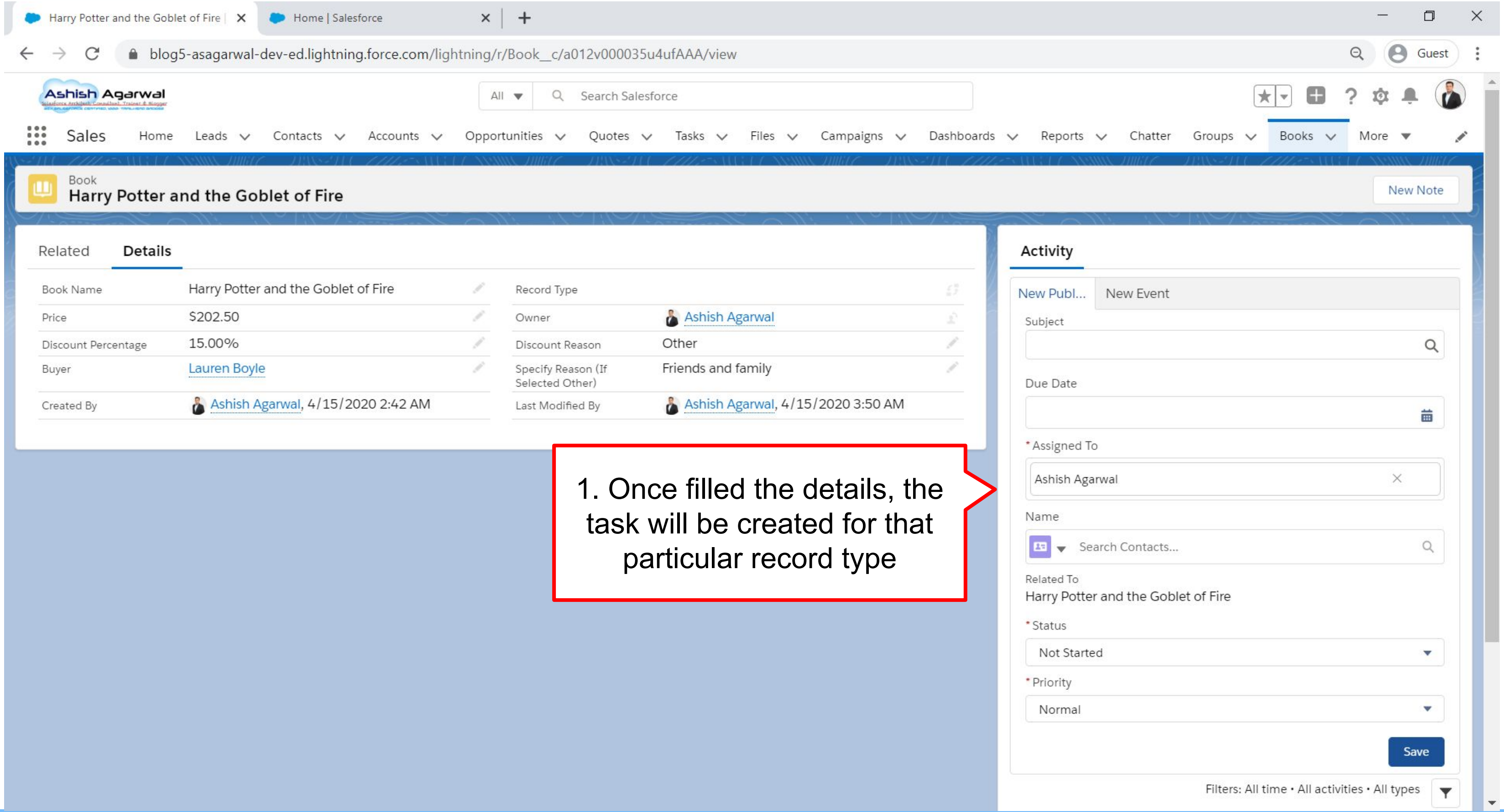
Custom Actions - Declarative



Custom Actions - Declarative

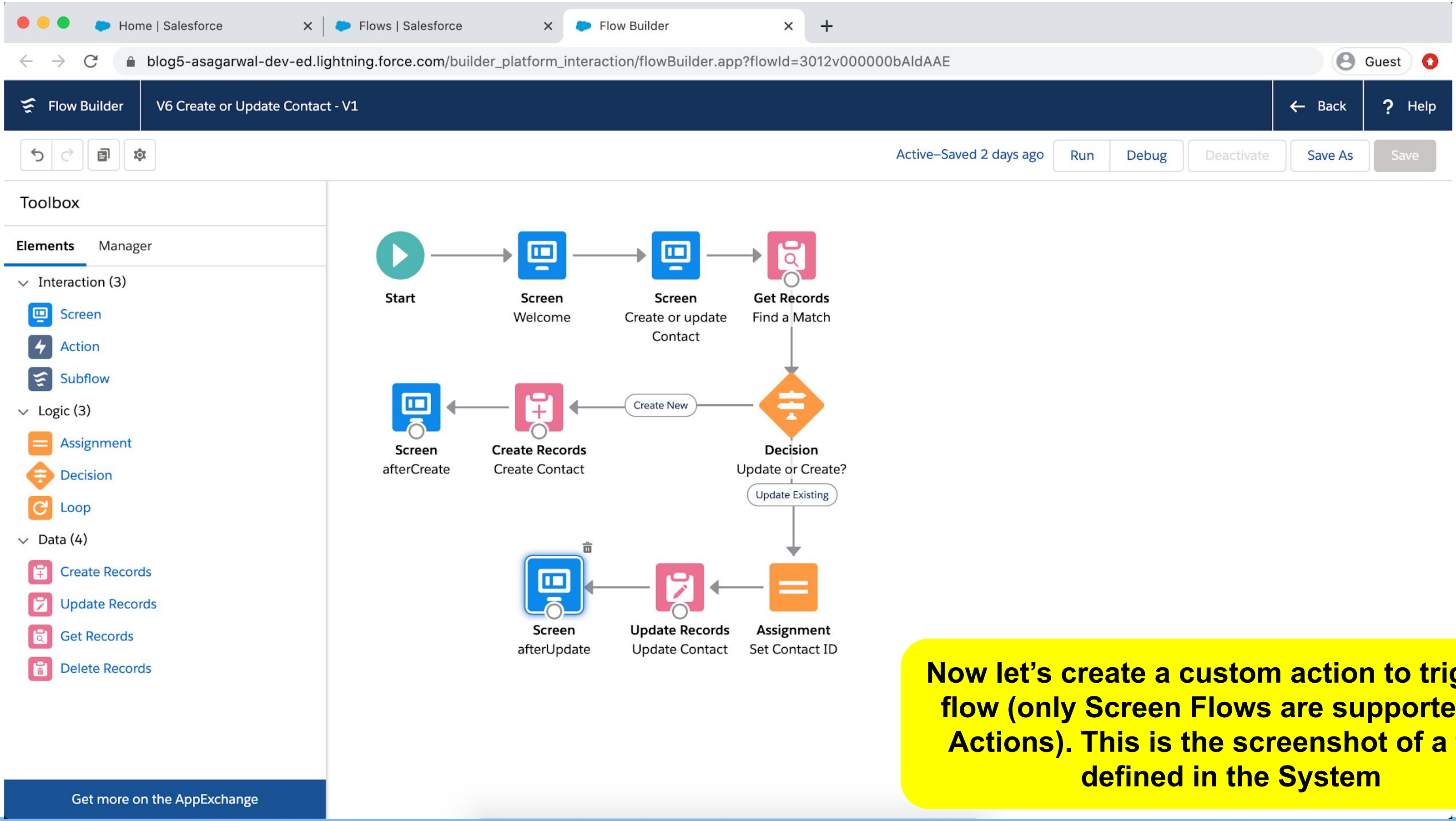


Custom Actions - Declarative



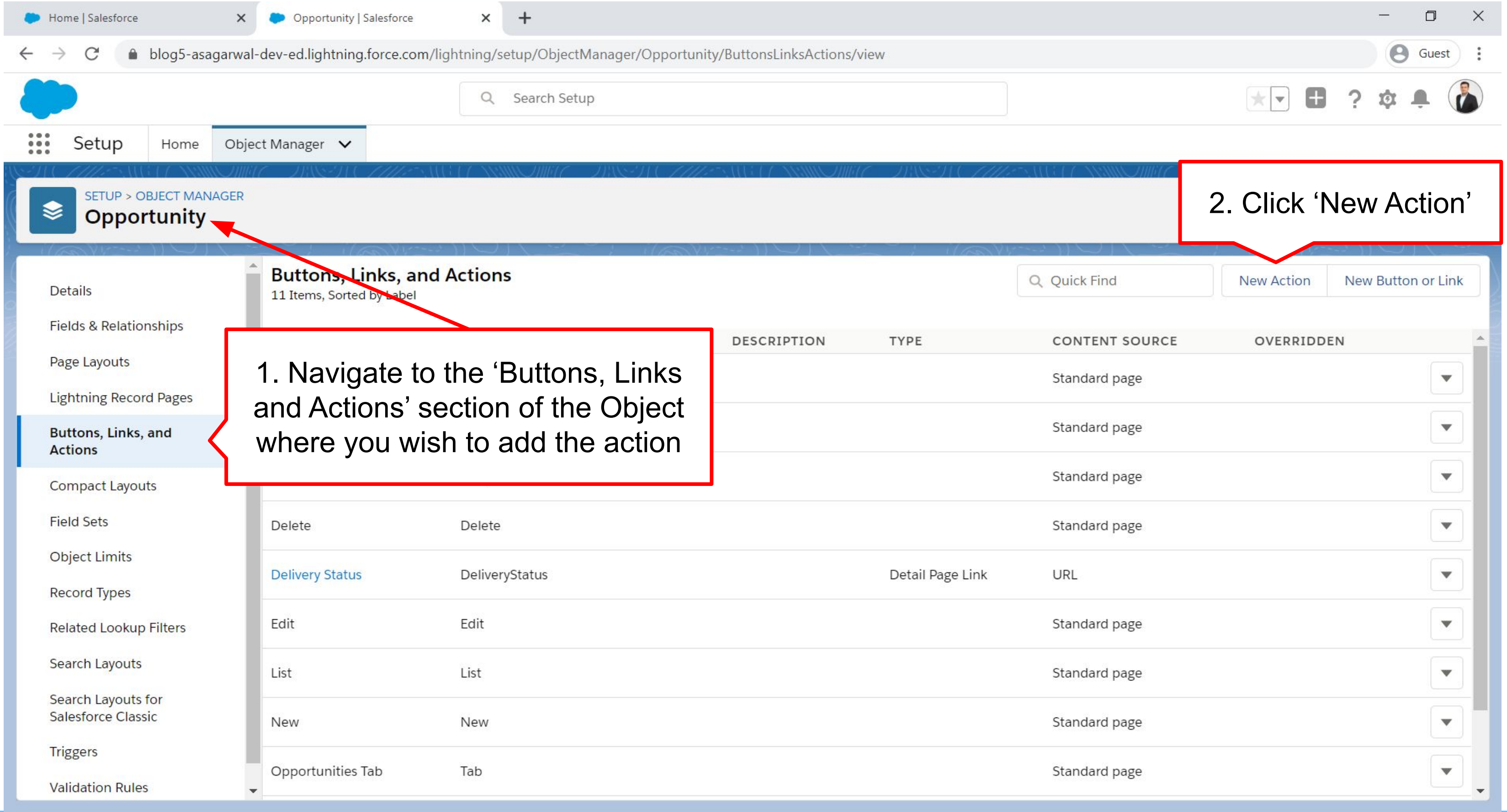
1. Once filled the details, the task will be created for that particular record type

Custom Actions - Flow

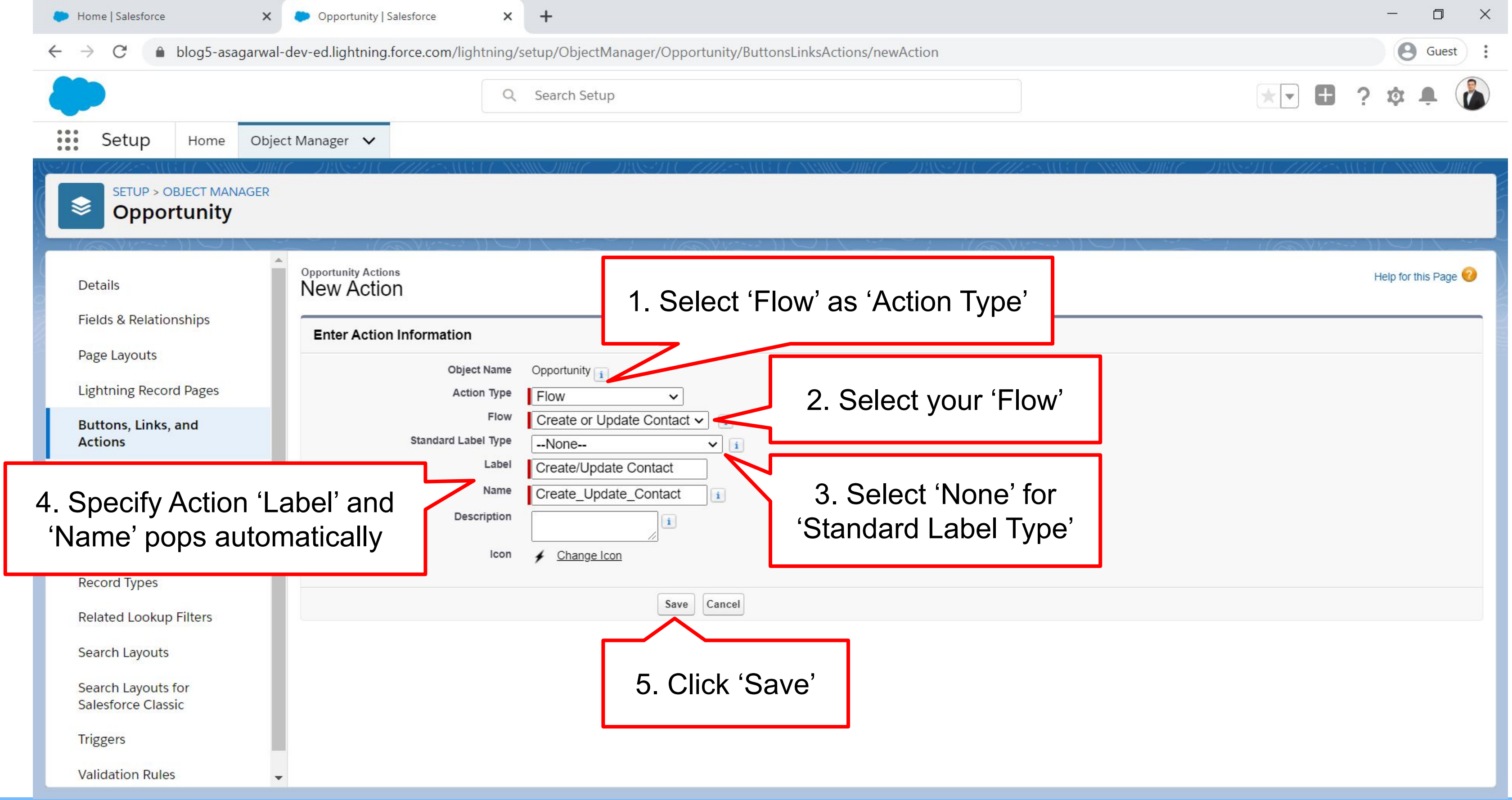


Now let's create a custom action to trigger a flow (only Screen Flows are supported for Actions). This is the screenshot of a flow defined in the System

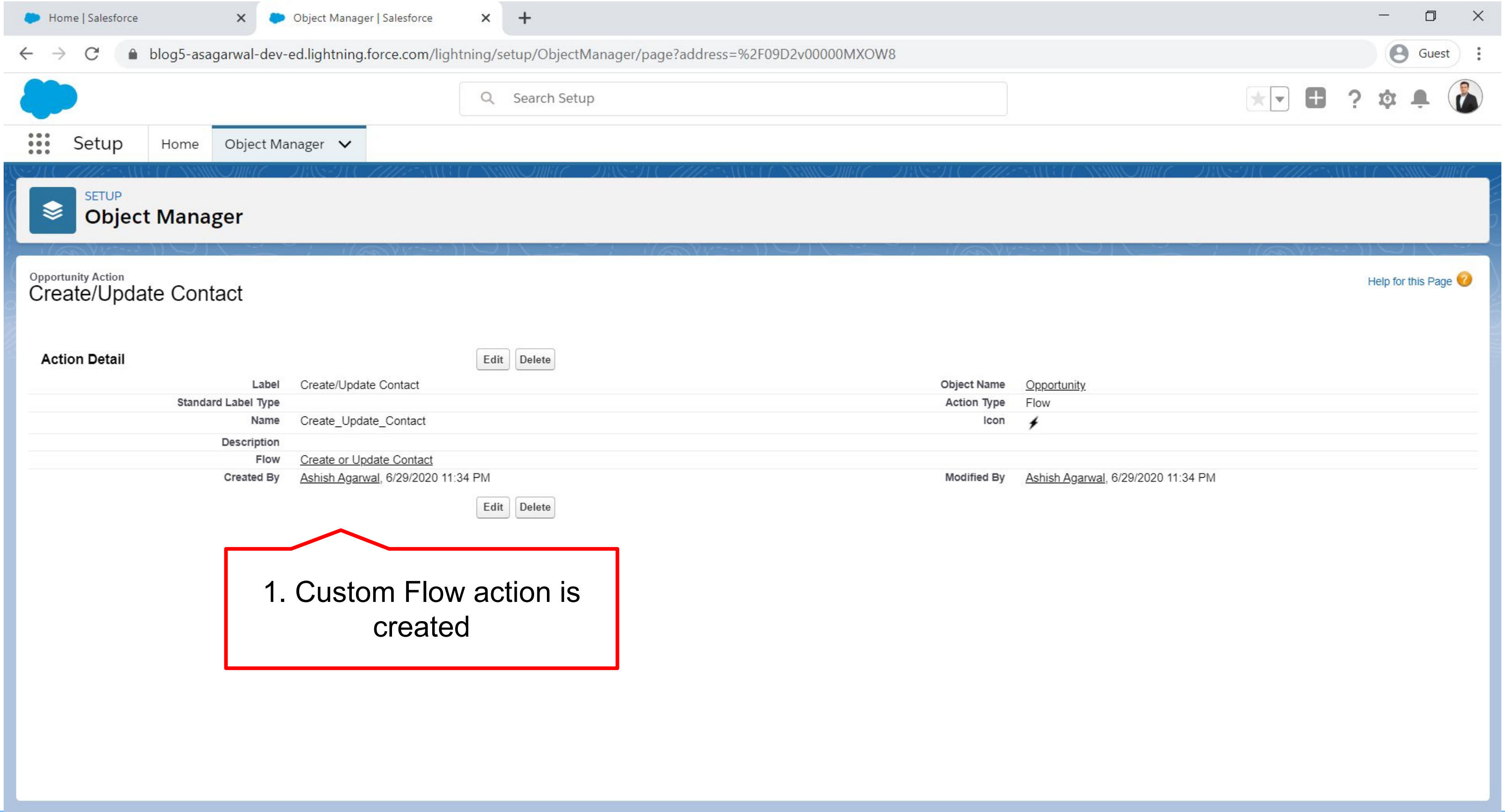
Custom Actions - Flow



Custom Actions - Flow

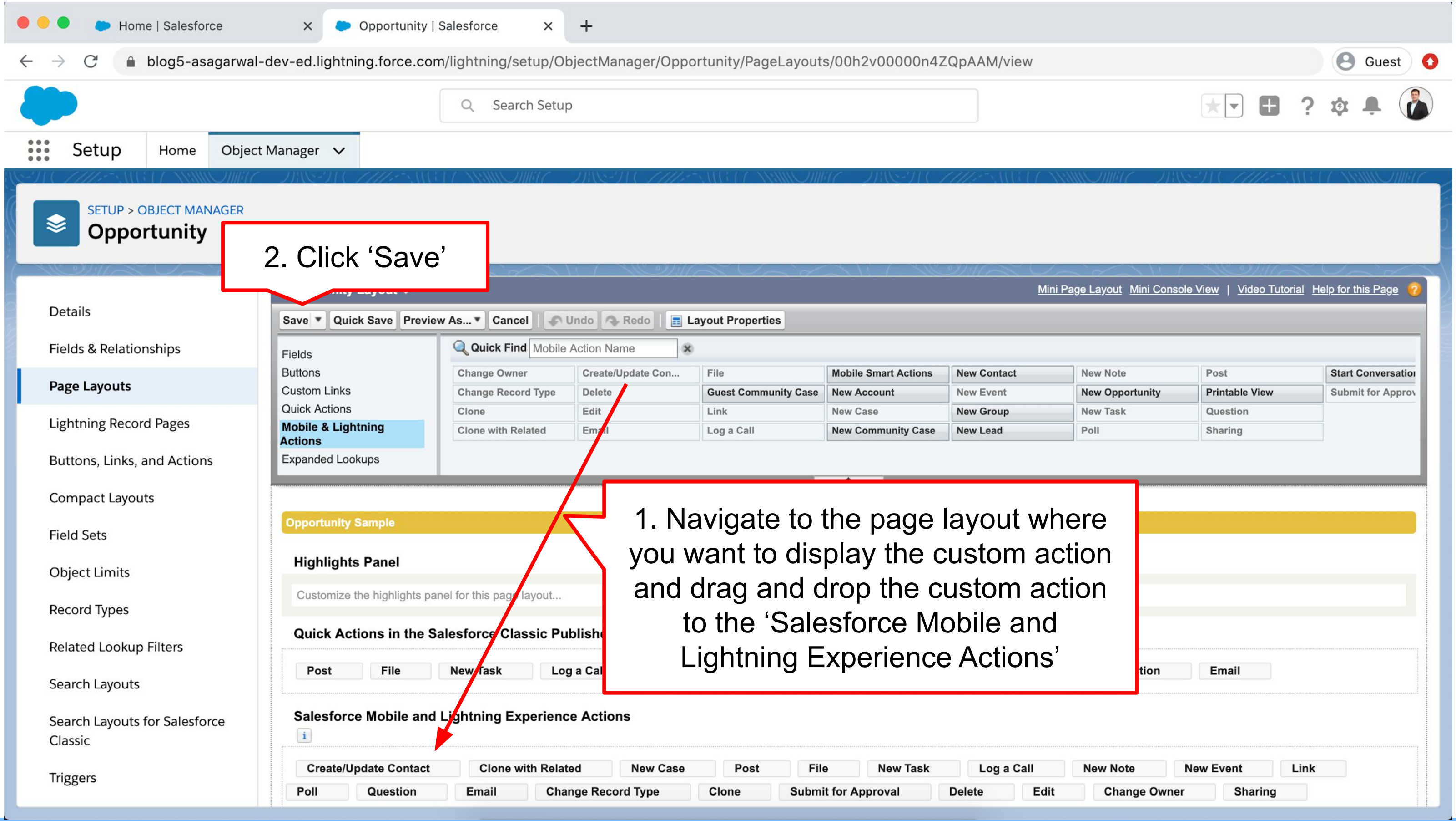


Custom Actions - Flow

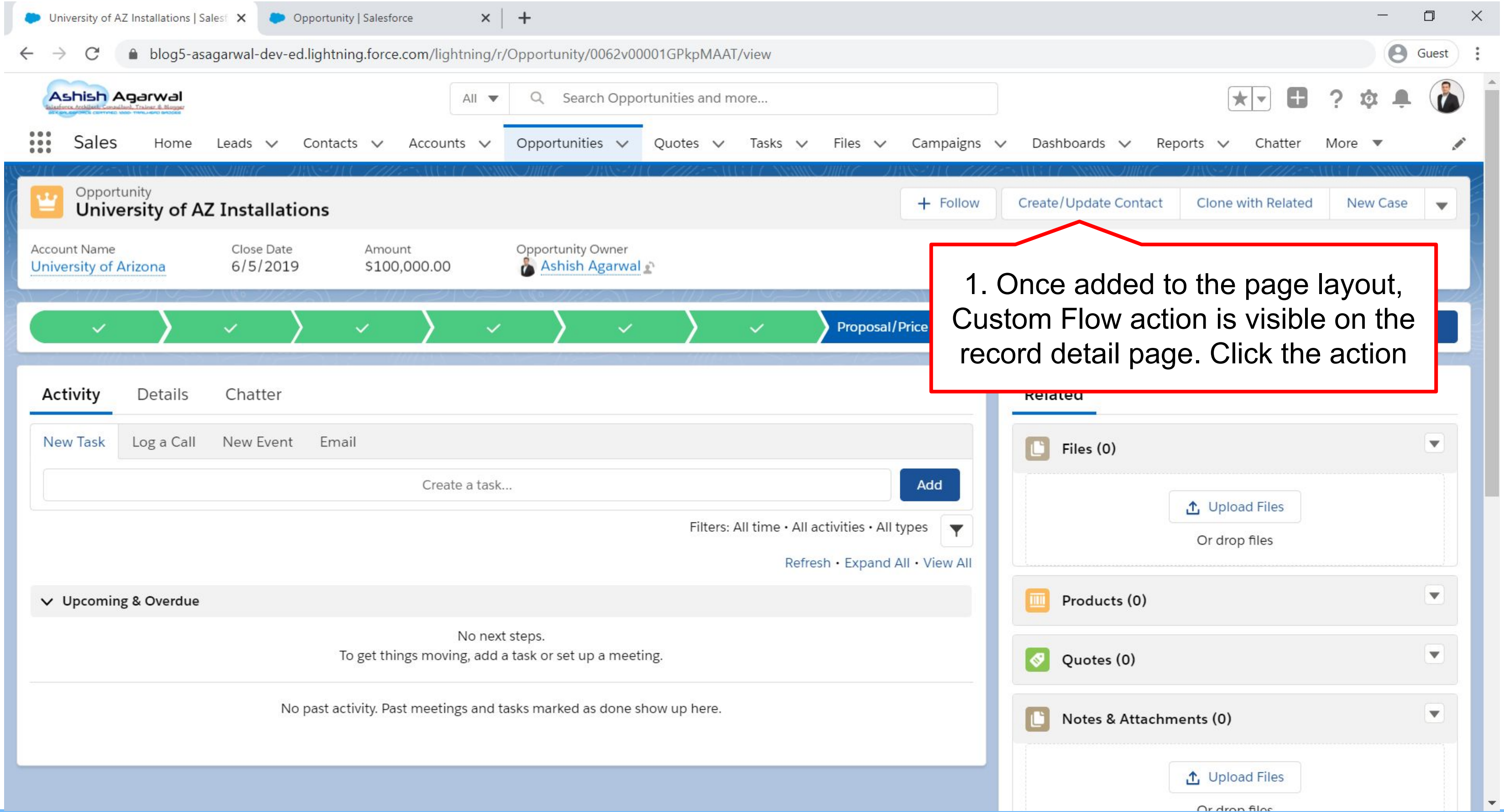


1. Custom Flow action is created

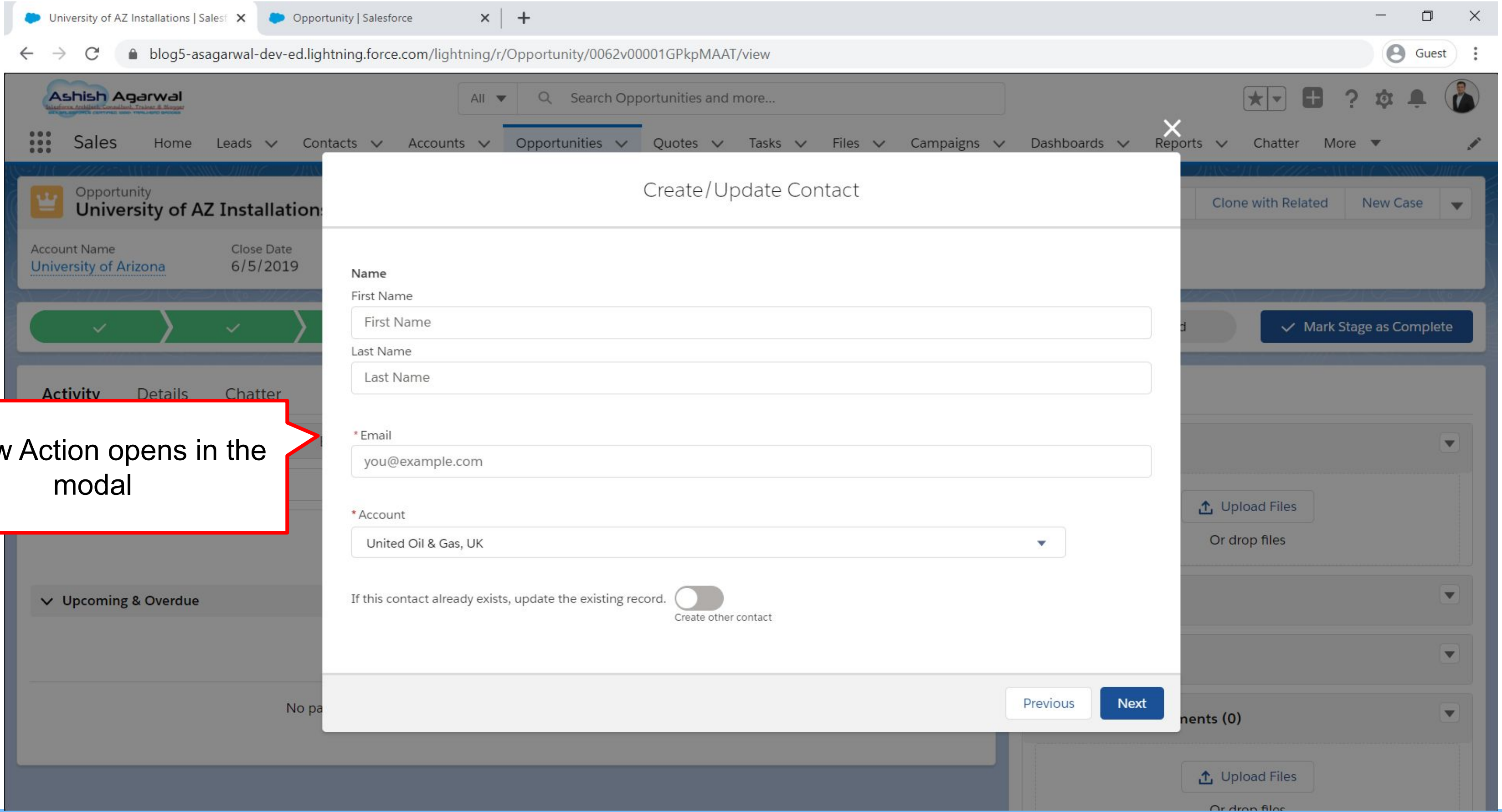
Custom Actions - Flow



Custom Actions - Flow

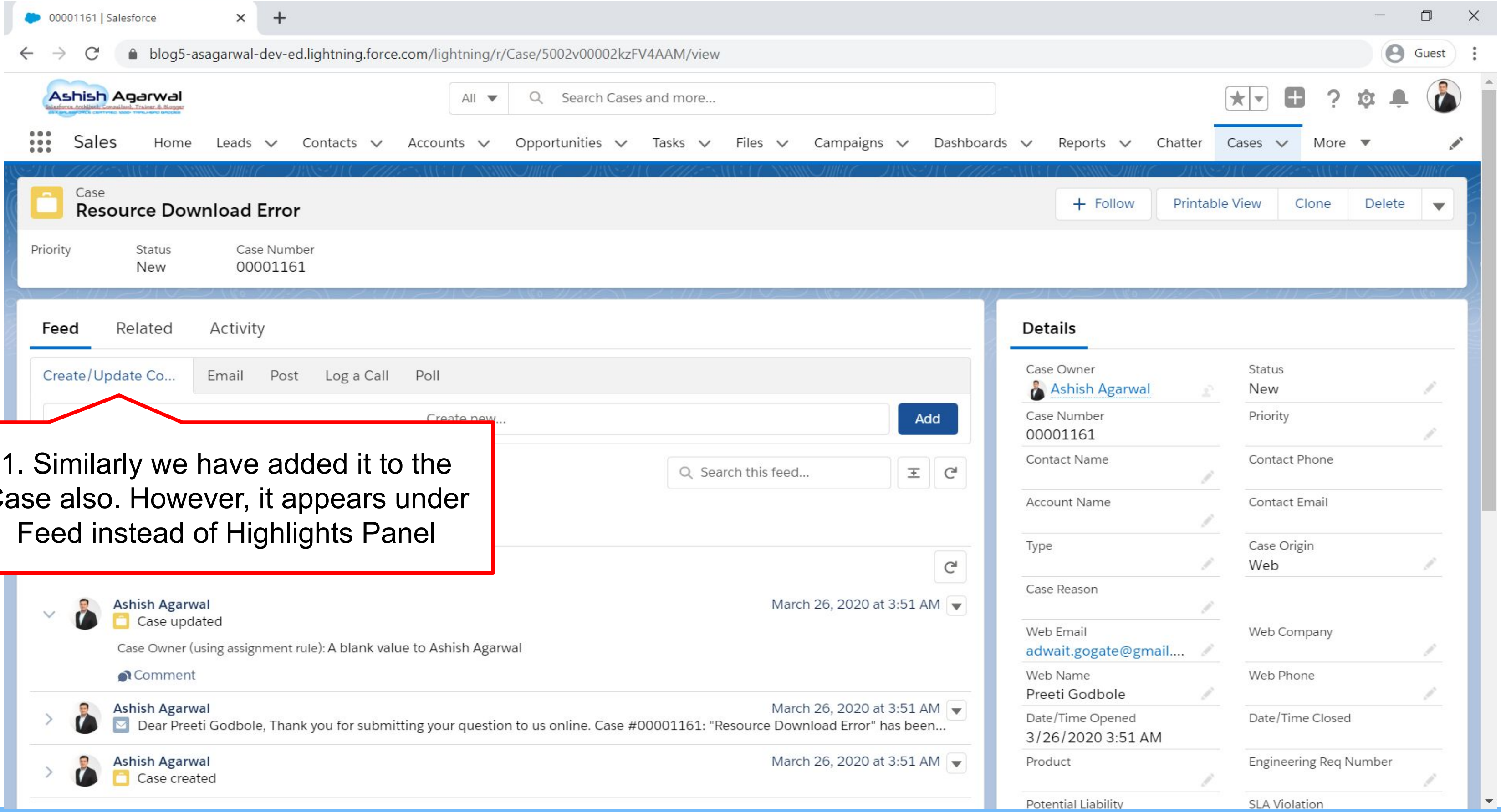


Custom Actions - Flow



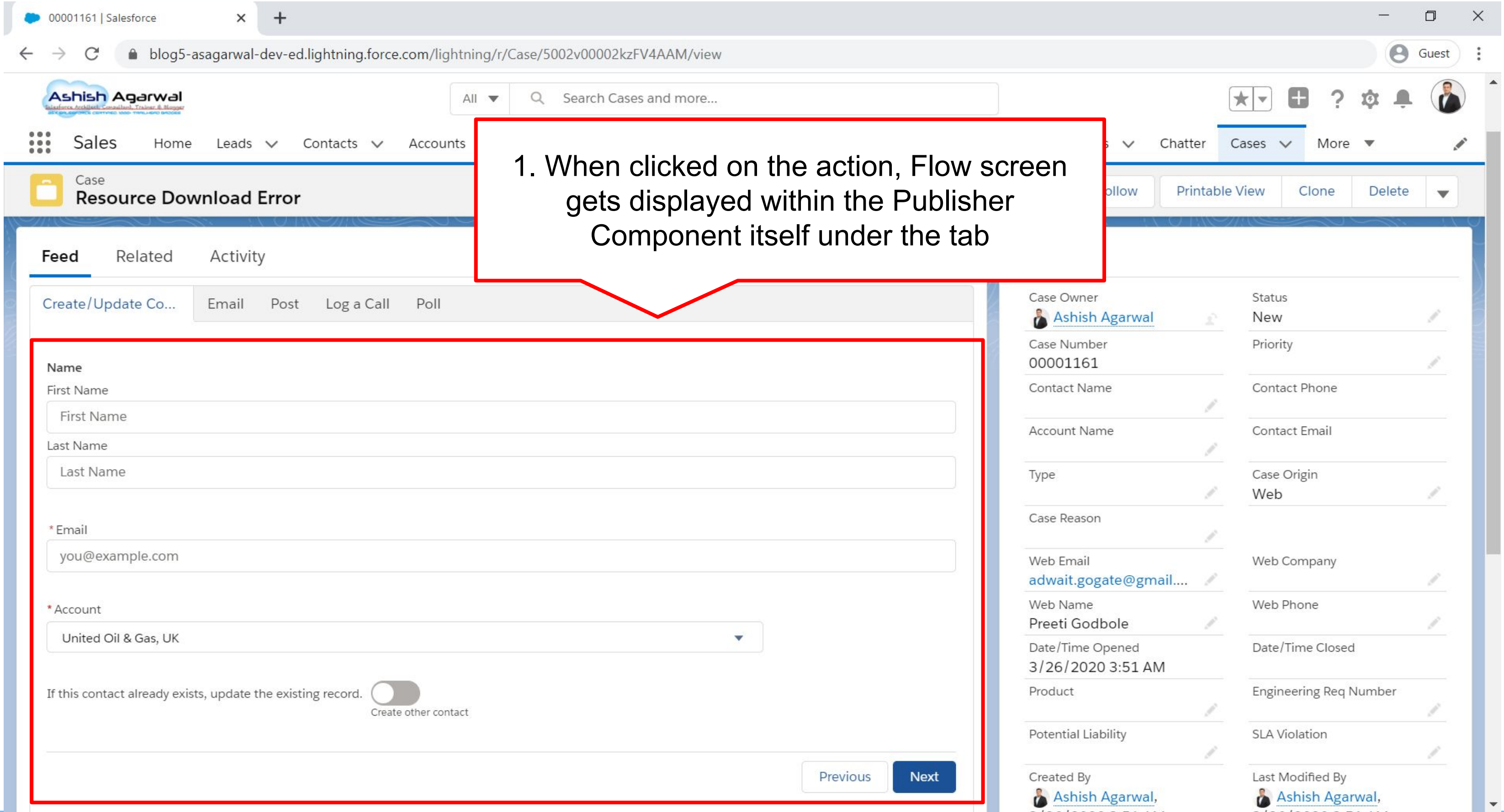
1. Flow Action opens in the modal

Custom Actions - Flow



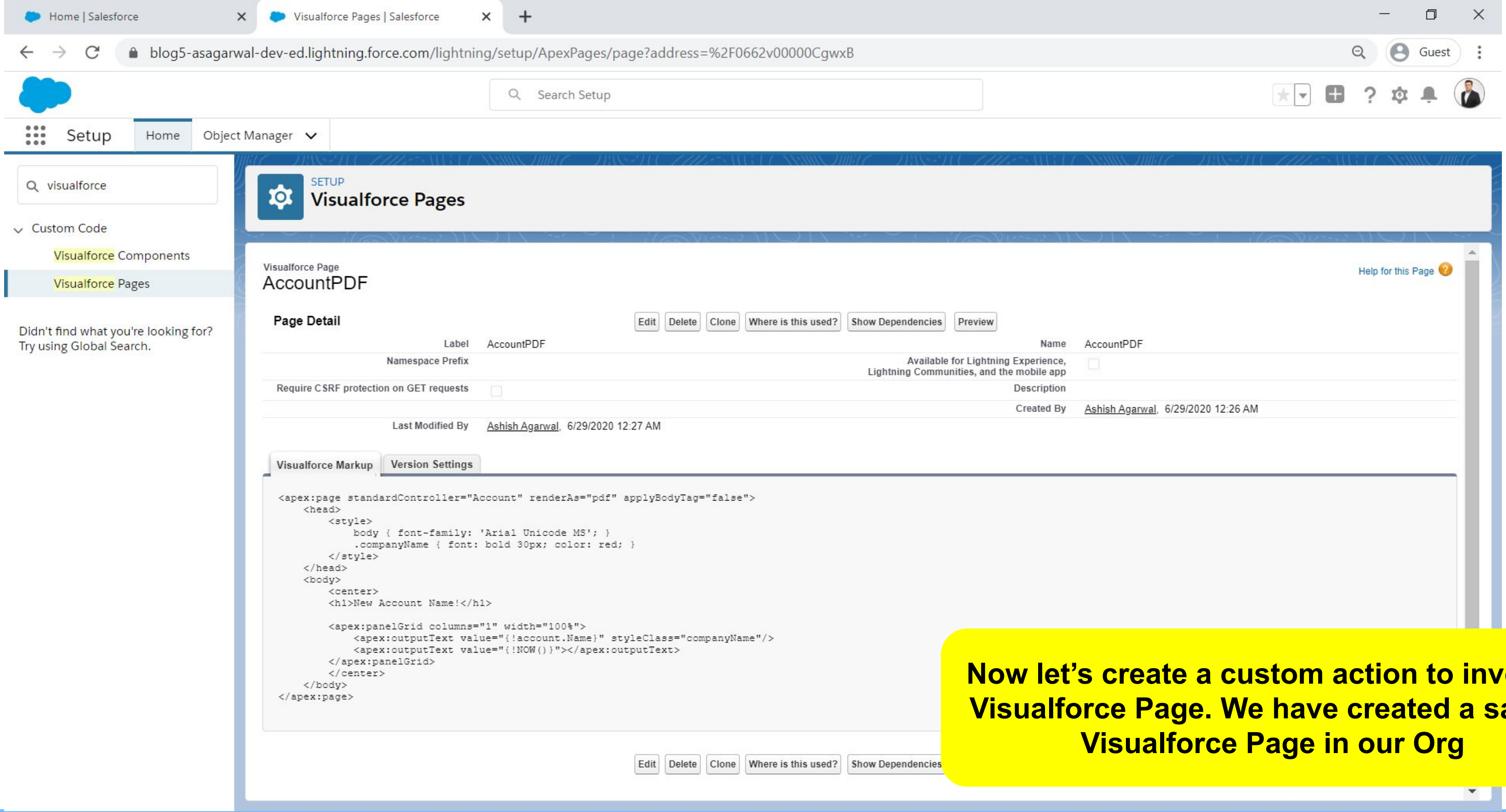
1. Similarly we have added it to the Case also. However, it appears under Feed instead of Highlights Panel

Custom Actions - Flow



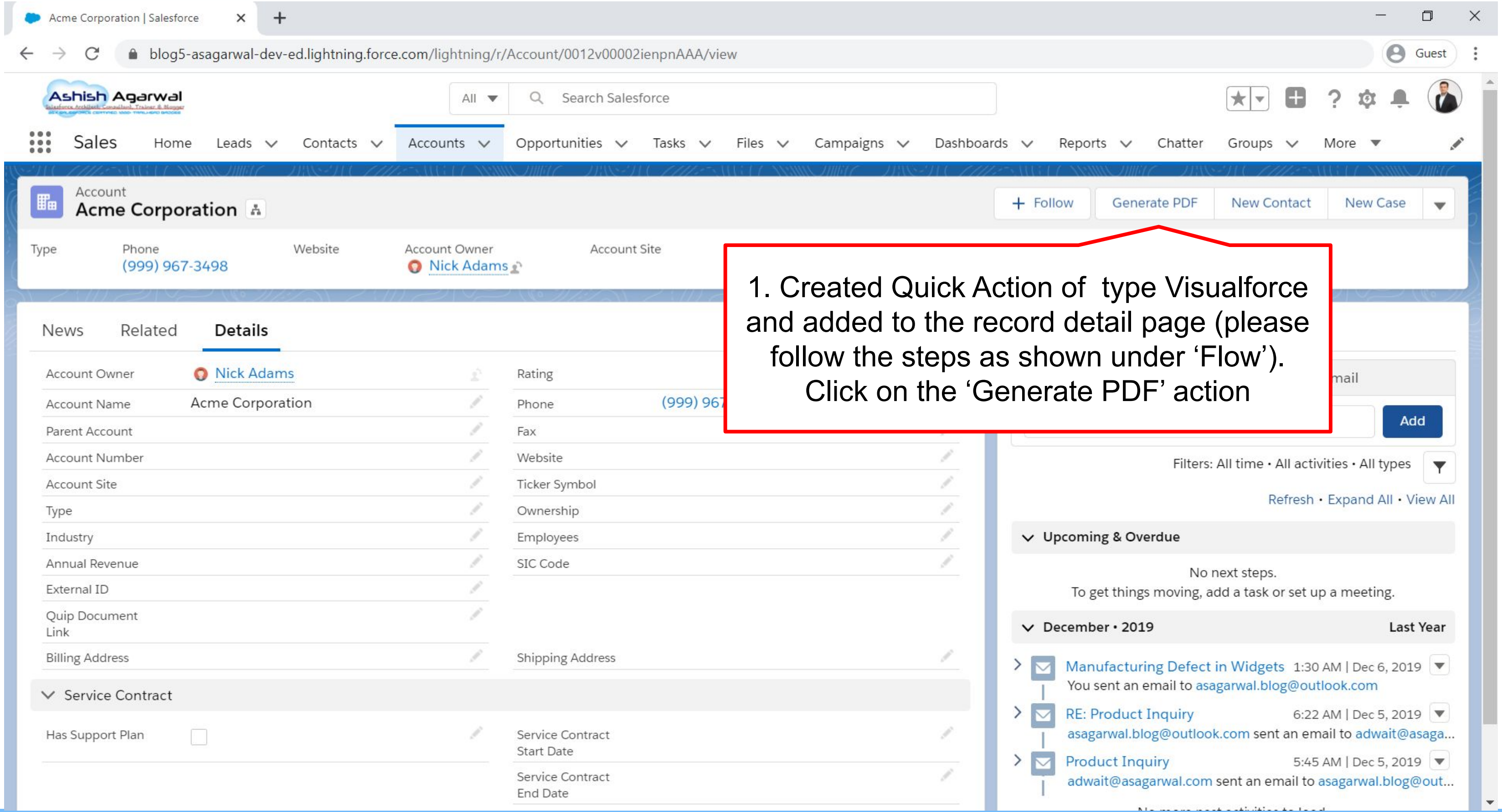
1. When clicked on the action, Flow screen gets displayed within the Publisher Component itself under the tab

Custom Actions - Visualforce Page

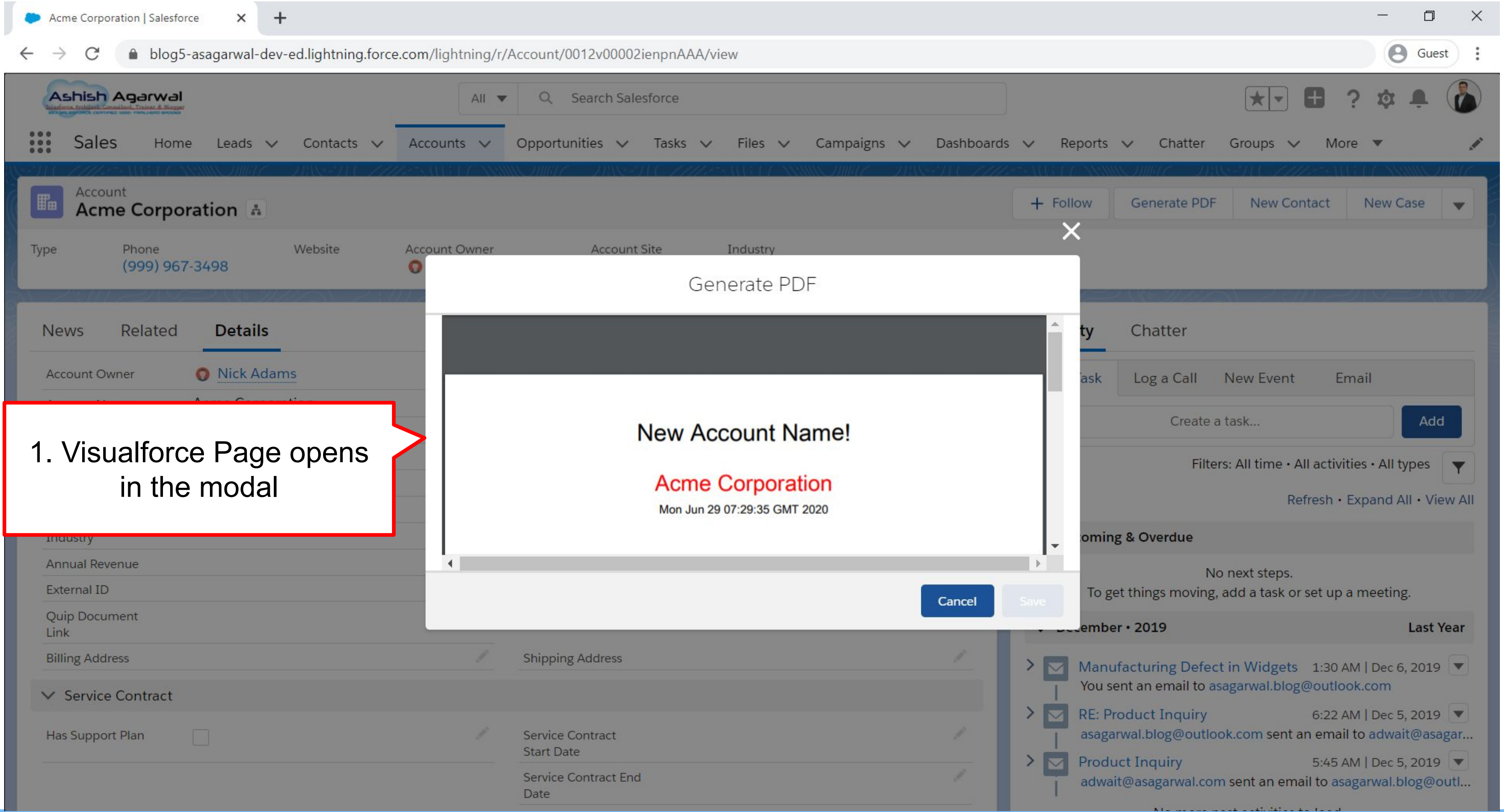


Now let's create a custom action to invoke a Visualforce Page. We have created a sample Visualforce Page in our Org

Custom Actions - Visualforce Page



Custom Actions - Visualforce Page

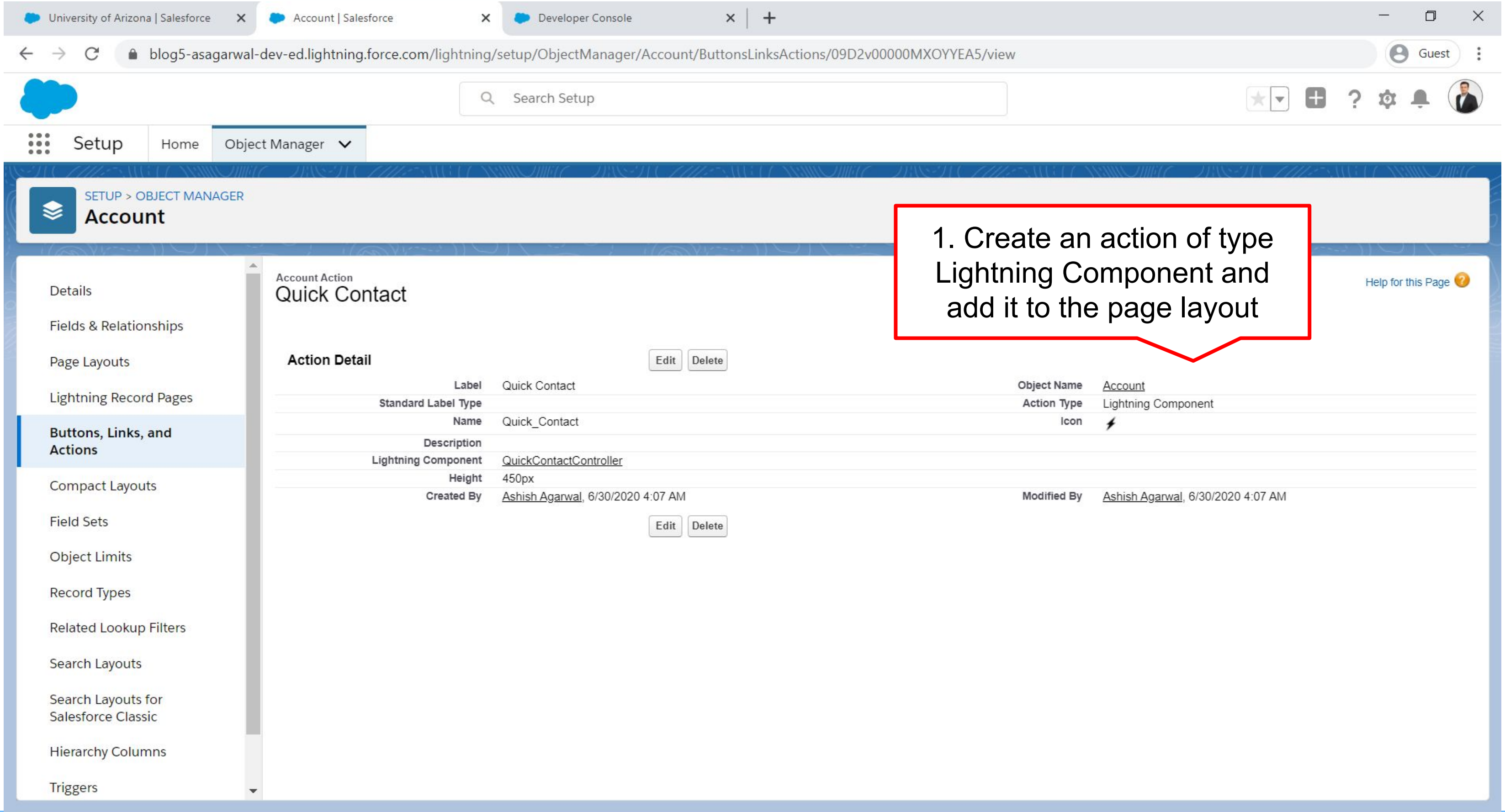


Custom Actions - Lightning Component

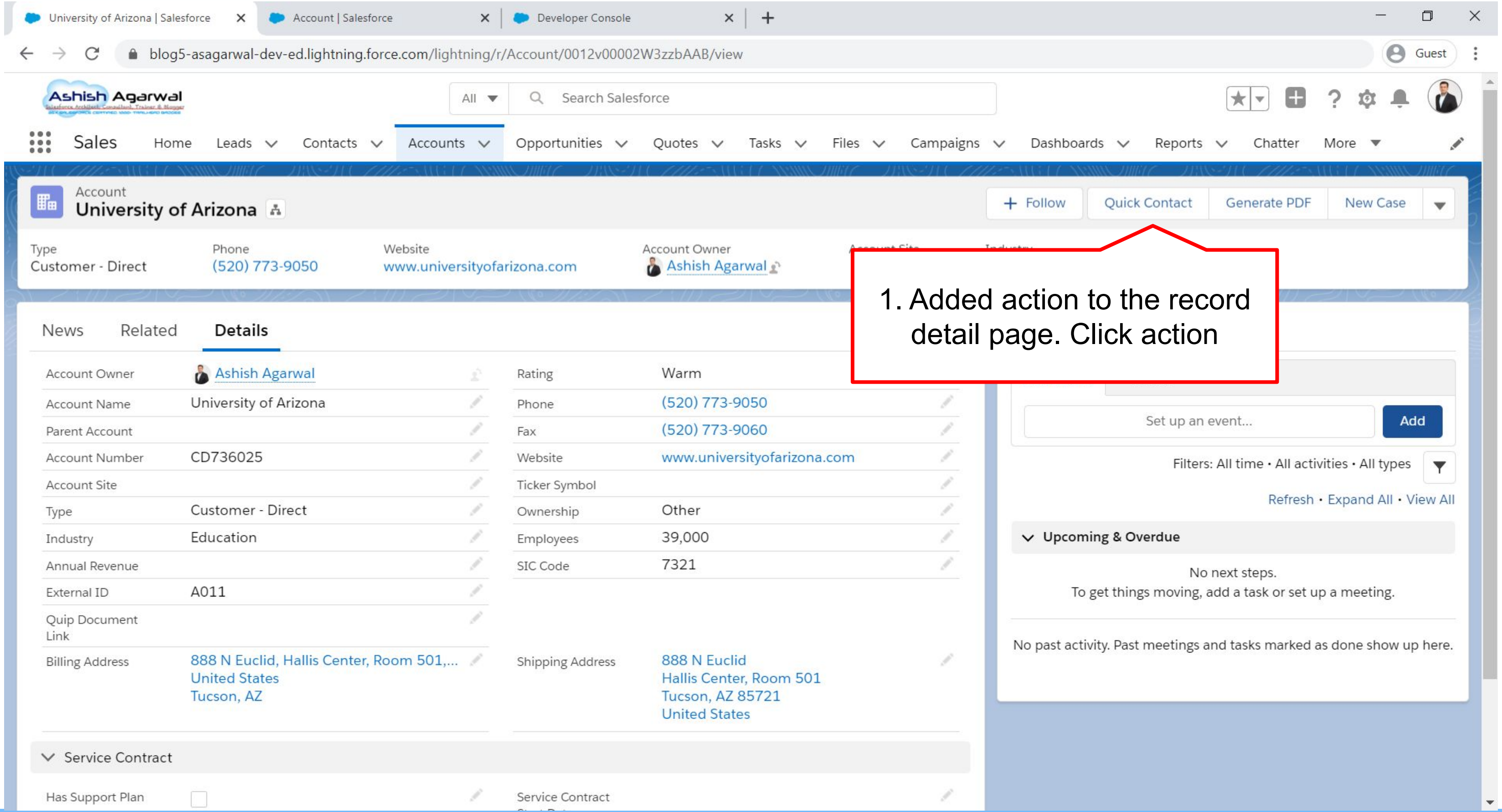
1. We have created a Lightning Component. The Lightning component must implement interface ‘`force:lightningQuickAction`’ or ‘`force:lightningQuickActionWithoutHeader`’ to allow it be used as the custom action

Finally let’s create a custom action to invoke a Lighting Component.

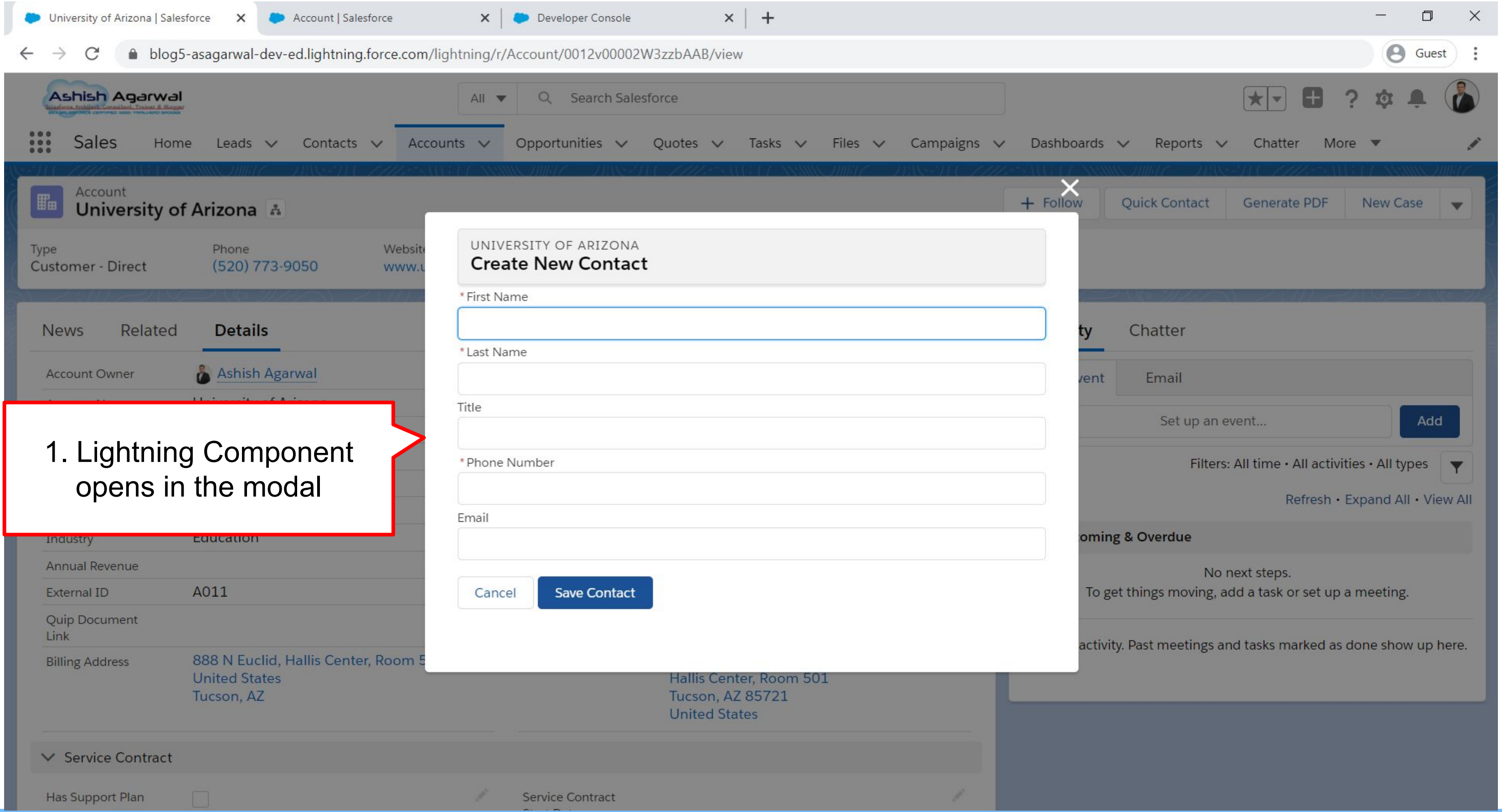
Custom Actions - Lightning Component



Custom Actions - Lightning Component



Custom Actions - Lightning Component

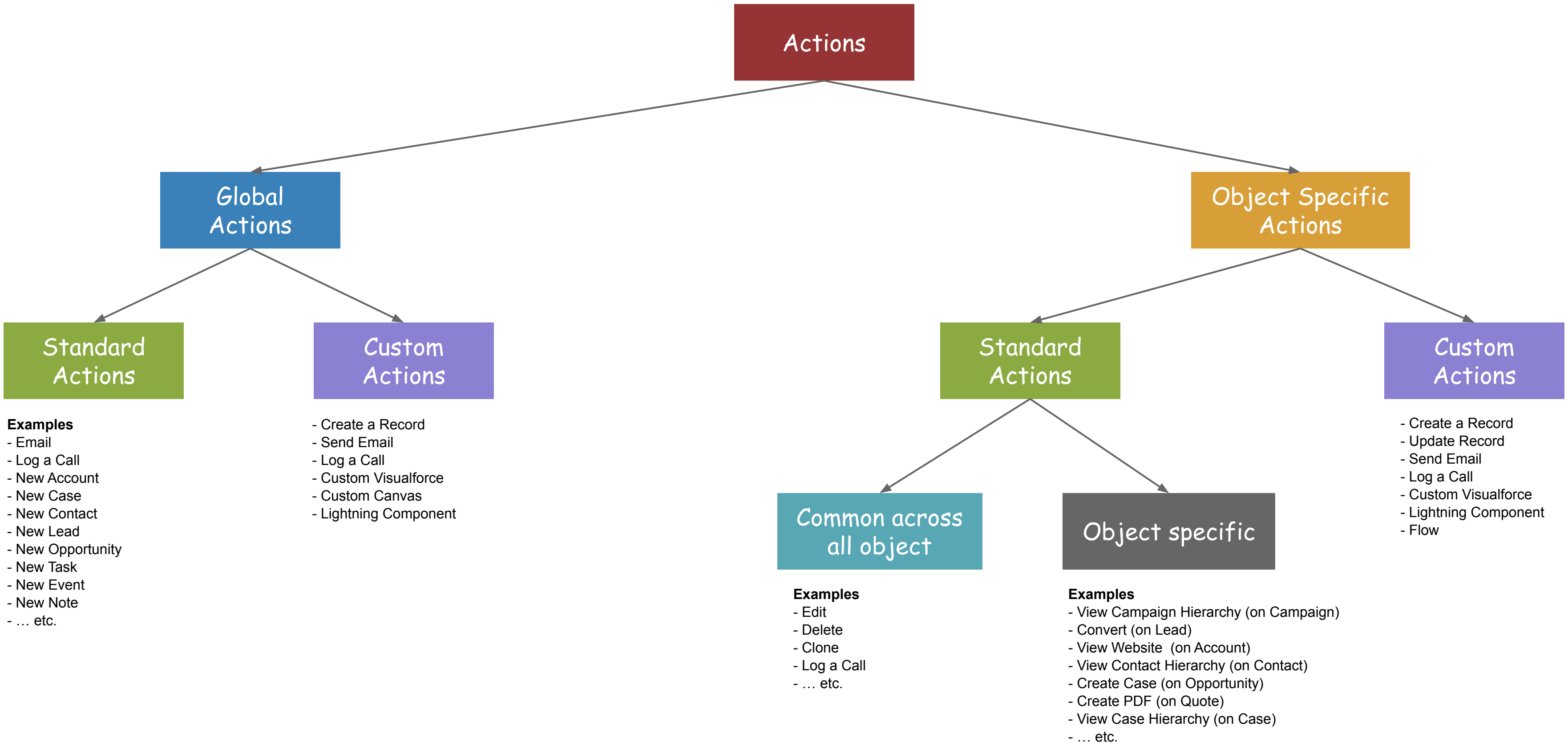


1. Lightning Component opens in the modal

Steps Overview

1. Create Global Action
2. Publish Global Action
3. Object Specific Actions
4. Override Predefined Actions
5. Which Action will be Displayed Where on the Page
6. Define Custom Actions

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