

How To Set Up **Mass Quick Action** in Salesforce

Steps Overview



Create a Quick Action



Set Predefined Field Values



Add Quick Action to Search Layout



Test Mass Quick Action

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/how-to-set-up-mass-quick-action-in-salesforce>

Use Cases (Real Life Scenarios)

Where will you use this?

- Create multiple Task records on Lead, Case or Custom objects at once
- Mass update Case statuses or add Case comments
- Mass update field values on standard/custom objects

Steps Overview



Create a Quick Action



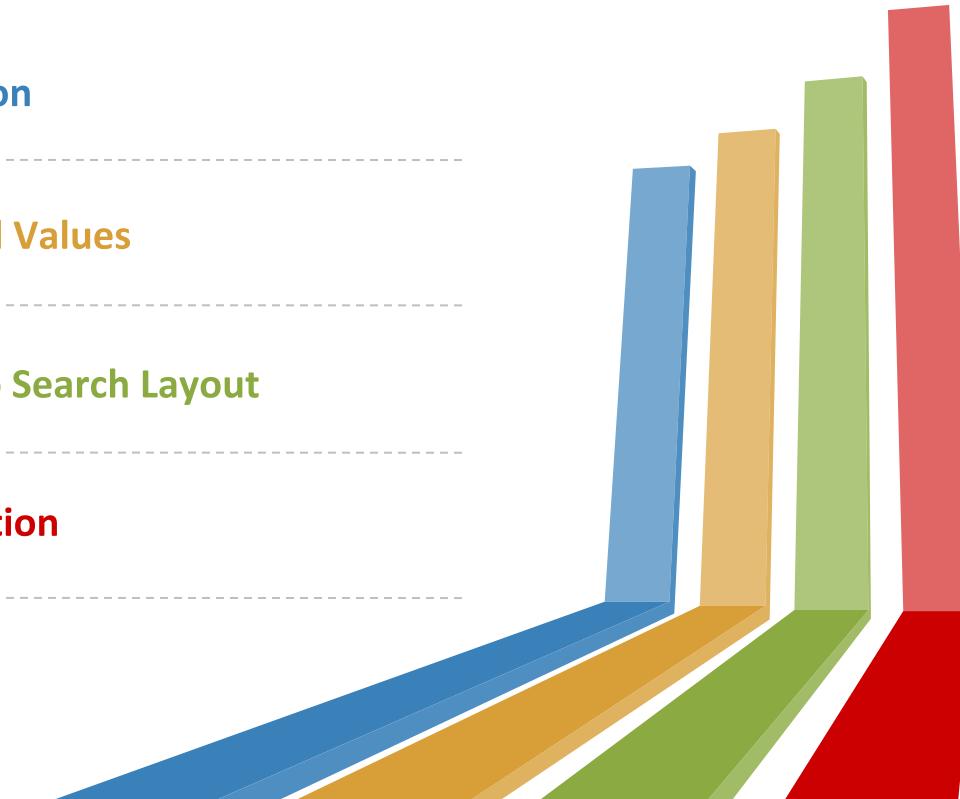
Set Predefined Field Values



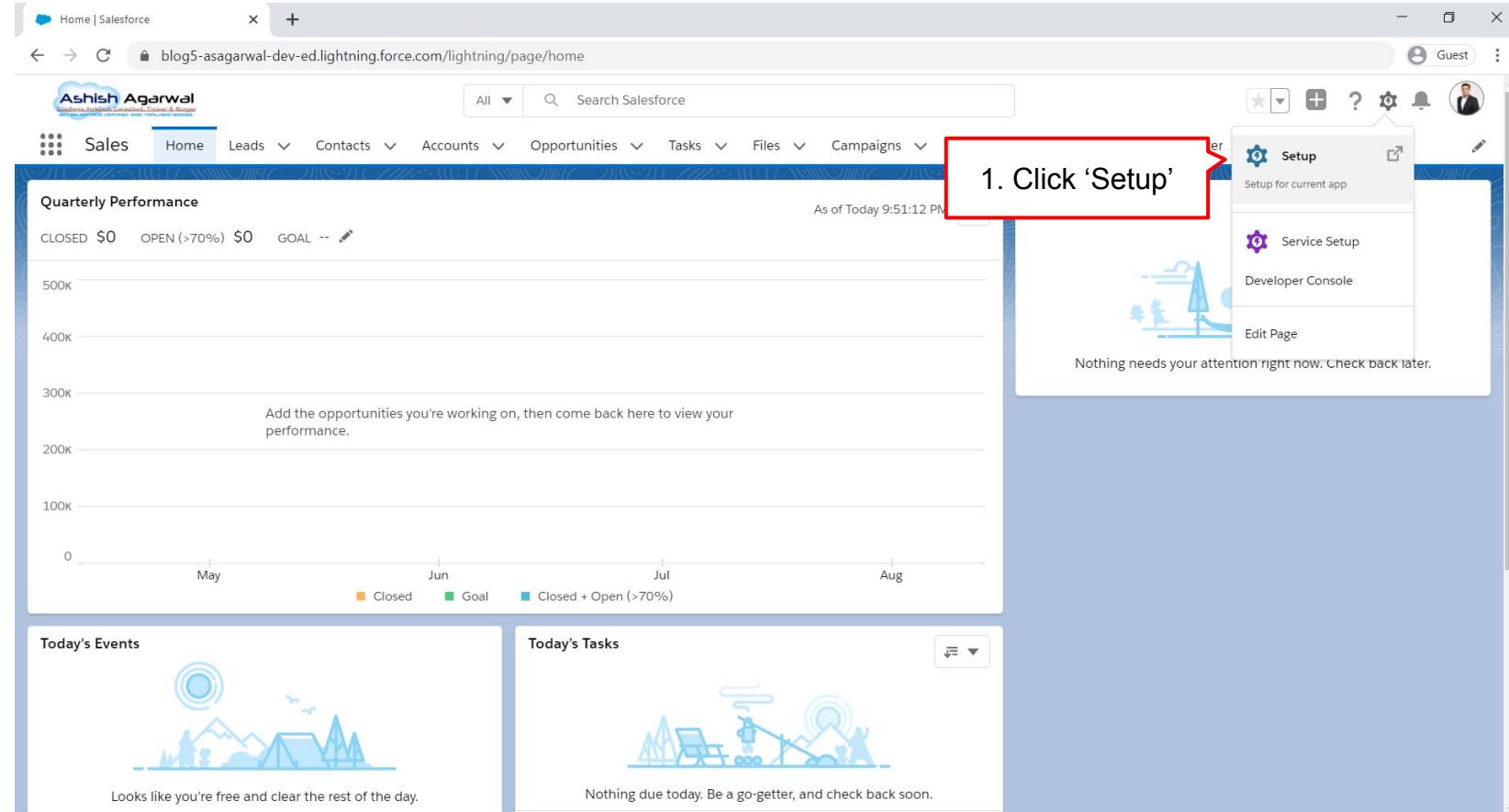
Add Quick Action to Search Layout



Test Mass Quick Action



Create a Quick Action



Home | Salesforce

blog5-asagarwal-dev-ed.lightning.force.com/lightning/page/home

Guest

Search Salesforce

All

Sales Home Leads Contacts Accounts Opportunities Tasks Files Campaigns

Quarterly Performance

CLOSED \$0 OPEN (>70%) \$0 GOAL --

500k

400k

300k

200k

100k

0

May Jun Jul Aug

Closed Goal Closed + Open (>70%)

Add the opportunities you're working on, then come back here to view your performance.

1. Click 'Setup'

Setup

Service Setup

Developer Console

Edit Page

Nothing needs your attention right now. Check back later.

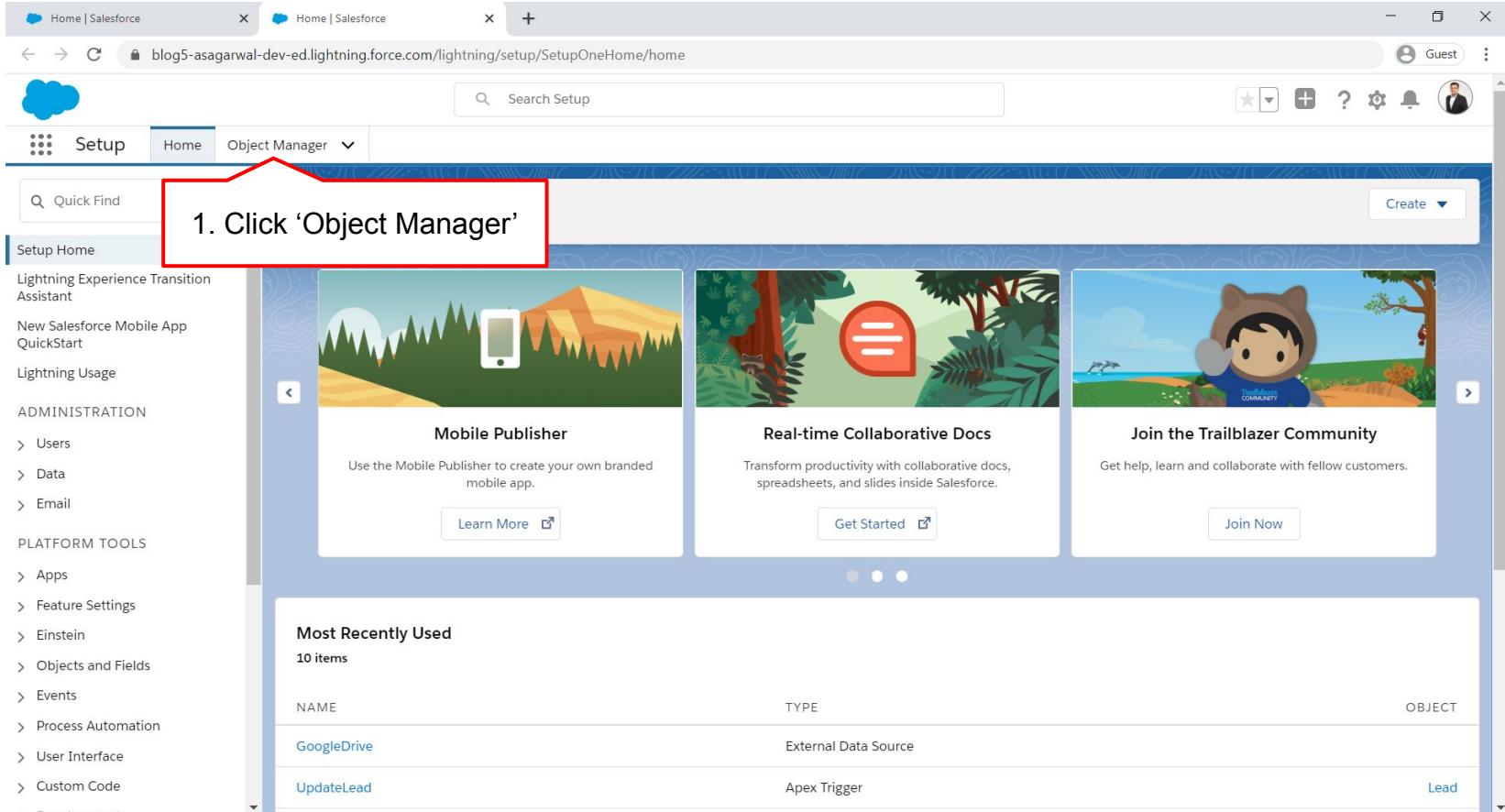
Today's Events

Today's Tasks

Looks like you're free and clear the rest of the day.

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

Create a Quick Action



1. Click 'Object Manager'

The screenshot shows the Salesforce Setup Home page. A red box highlights the 'Object Manager' tab in the top navigation bar. The page displays various setup options and a 'Most Recently Used' section. The 'Object Manager' tab is the active one.

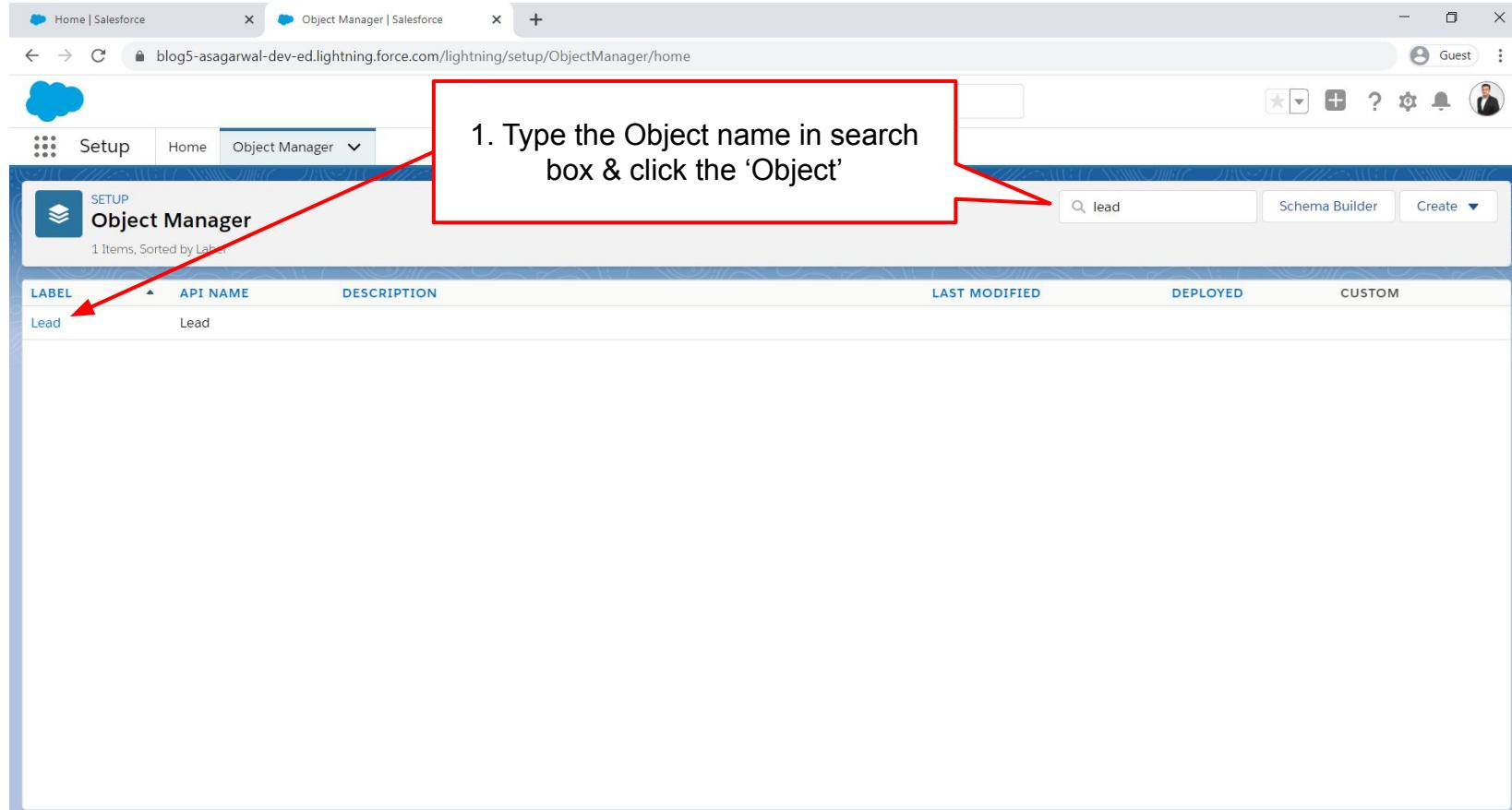
Setup Home

- Lightning Experience Transition Assistant
- New Salesforce Mobile App QuickStart
- Lightning Usage
- ADMINISTRATION
 - Users
 - Data
 - Email
- PLATFORM TOOLS
 - Apps
 - Feature Settings
 - Einstein
 - Objects and Fields
 - Events
 - Process Automation
 - User Interface
 - Custom Code
 - Development

Most Recently Used

NAME	TYPE	OBJECT
GoogleDrive	External Data Source	
UpdateLead	Apex Trigger	Lead

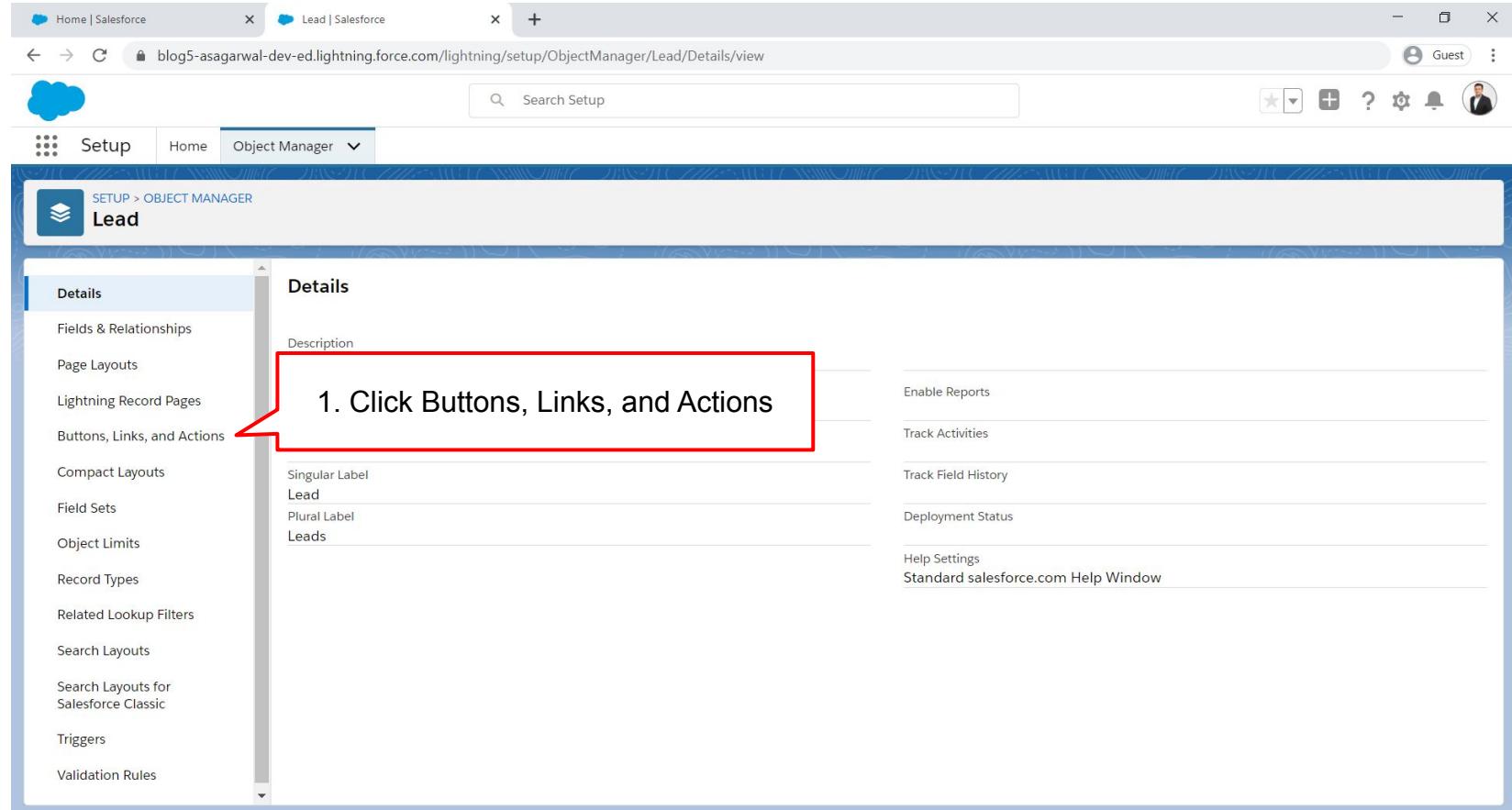
Create a Quick Action



1. Type the Object name in search box & click the 'Object'

LABEL	API NAME	DESCRIPTION	LAST MODIFIED	DEPLOYED	CUSTOM
Lead	Lead				

Create a Quick Action



Home | Salesforce Lead | Salesforce

blog5-asagarwal-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Lead/Details/view

Guest

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Lead

Details

Fields & Relationships

Page Layouts

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

Validation Rules

Details

Description

1. Click Buttons, Links, and Actions

Singular Label

Lead

Plural Label

Leads

Enable Reports

Track Activities

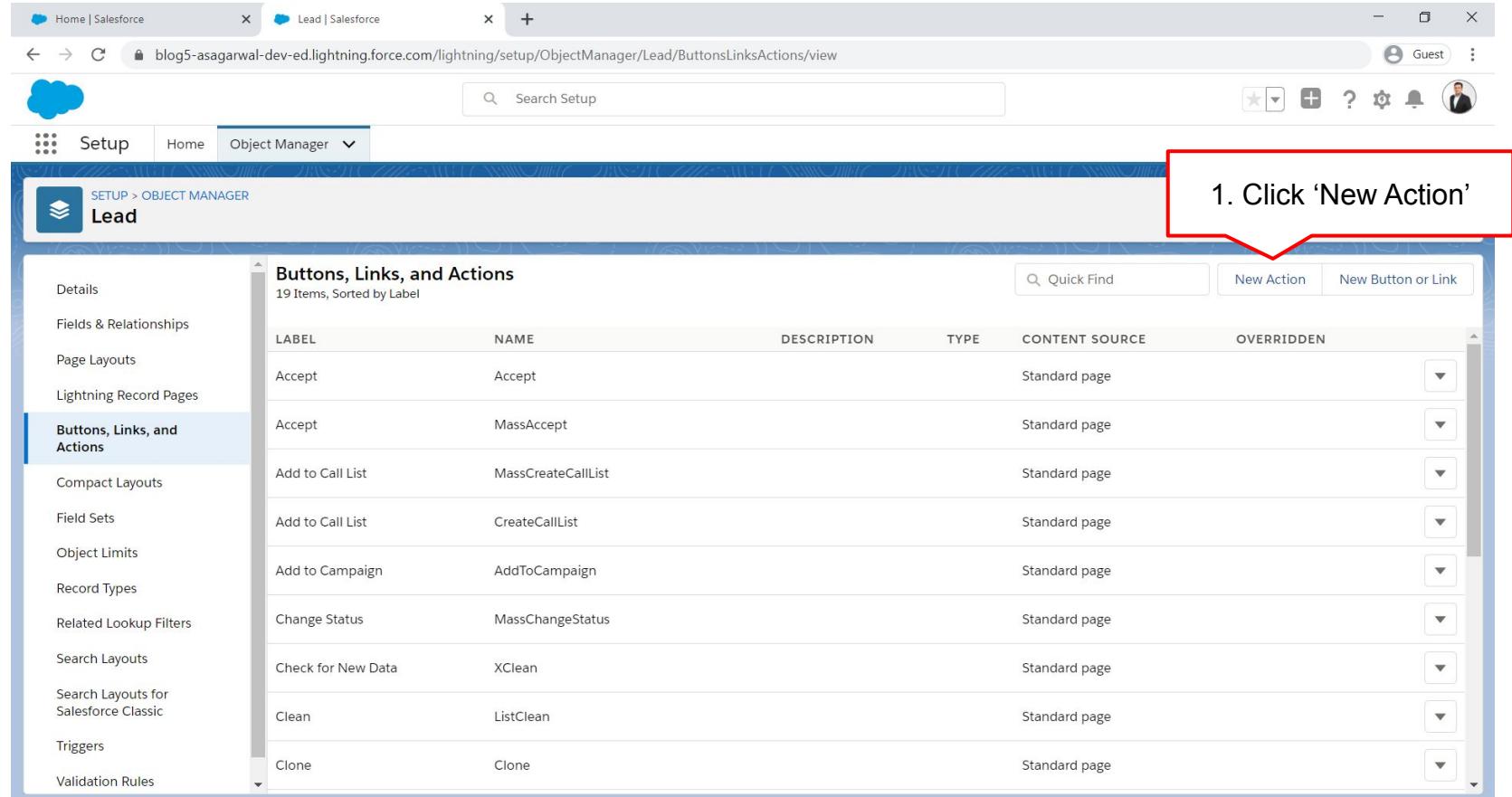
Track Field History

Deployment Status

Help Settings

Standard salesforce.com Help Window

Create a Quick Action



1. Click 'New Action'

Details

Fields & Relationships

Page Layouts

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

Validation Rules

Buttons, Links, and Actions
19 Items, Sorted by Label

LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Accept	Accept			Standard page	▼
Accept	MassAccept			Standard page	▼
Add to Call List	MassCreateCallList			Standard page	▼
Add to Call List	CreateCallList			Standard page	▼
Add to Campaign	AddToCampaign			Standard page	▼
Change Status	MassChangeStatus			Standard page	▼
Check for New Data	XClean			Standard page	▼
Clean	ListClean			Standard page	▼
Clone	Clone			Standard page	▼

Create a Quick Action

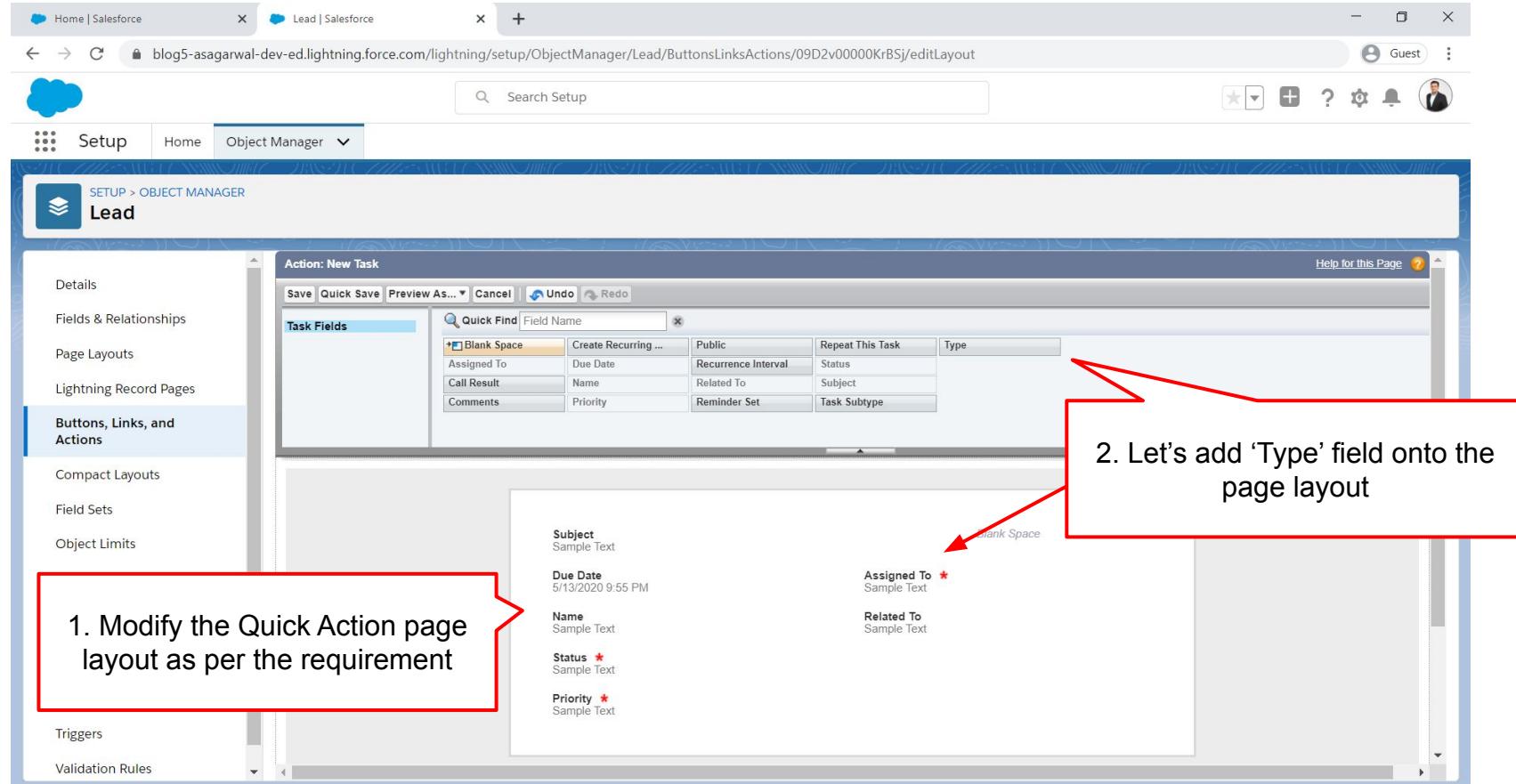
The screenshot shows the Salesforce Setup interface with the following steps highlighted:

1. Select 'Action Type'
2. Select 'Target Object'
3. Select 'Standard Label Type'
4. Specify 'Name'
5. Enter short 'Description'
6. Optionally select whether to 'Create Feed Item', specify 'Success Message' after action is completed & change 'Icon' (Shows only in Classic)
7. Click 'Save'

The 'Enter Action Information' form fields shown are:

- Object Name: Lead
- Action Type: Create a Record
- Target Object: Task
- Standard Label Type: New [Record]
- Name: New_Task
- Description: Create a Task for multiple Lead records from a list view
- Create Feed Item:
- Success Message: (empty)
- Icon: Change Icon

Create a Quick Action



1. Modify the Quick Action page layout as per the requirement

2. Let's add 'Type' field onto the page layout

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Triggers

Validation Rules

Home | Salesforce

Lead | Salesforce

blog5-asagarwal-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Lead/ButtonsLinksActions/09D2v00000KrbSj/editLayout

Guest

Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Lead

Action: New Task

Save Quick Save Preview As... Cancel Undo Redo

Task Fields

Quick Find Field Name

Blank Space	Create Recurring ...	Public	Repeat This Task	Type
Assigned To	Due Date	Recurrence Interval	Status	
Call Result	Name	Related To	Subject	
Comments	Priority	Reminder Set	Task Subtype	

Subject
Sample Text

Due Date
5/13/2020 9:55 PM

Assigned To
Sample Text

Name
Sample Text

Related To
Sample Text

Status
Sample Text

Priority
Sample Text

Create a Quick Action

1. Notice, Salesforce gives a suggestion if too many fields added to the layout then it can affect user efficiency. It recommends having maximum 8 fields on the layout.

2. Click 'Save' once done

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Search Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

SETUP > OBJECT Lead

Save Quick Save Preview As... Cancel Undo Redo

Task Fields

Blank Space	Create Recurring ...	Public	Repeat This Task	Type
Assigned To	Due Date	Recurrence Interval	Status	
Call Result	Name	Related To	Subject	
Comments	Priority	Reminder Set	Task Subtype	

Adding too many fields to an action layout can impact user efficiency. We recommend a maximum of 8 fields. To reduce the number of fields, you can set predefined values for fields that need a value, but won't often be edited. You can safely remove those fields from the layout. Set predefined values from the action detail page.

Subject
Sample Text

Due Date
5/13/2020 9:55 PM

Name
Sample Text

Status
Sample Text

Priority
Sample Text

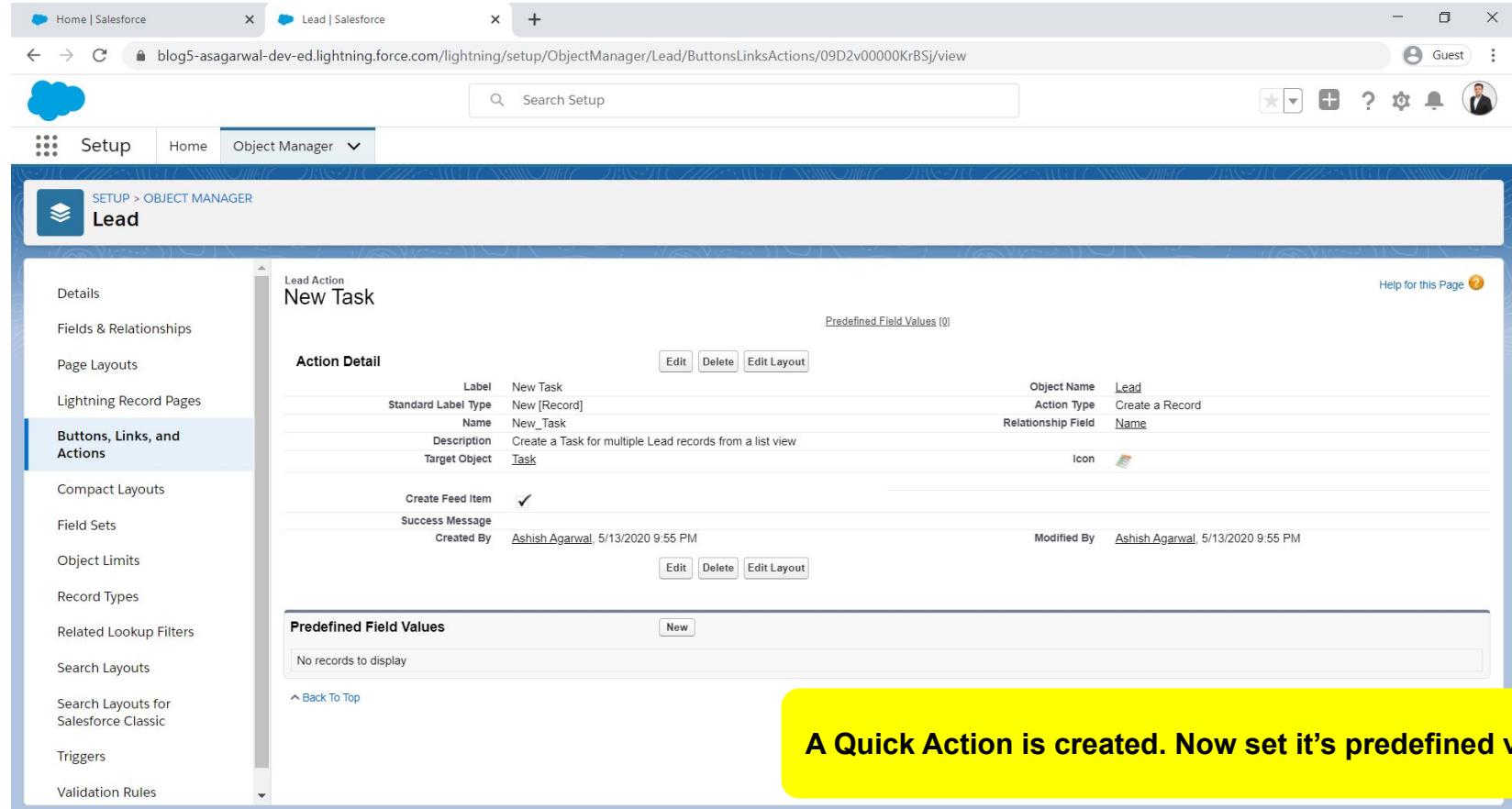
Blank Space

Type
Sample Text

Assigned To
Sample Text

Related To
Sample Text

Create a Quick Action



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

- Page Header:** Home | Salesforce, Lead | Salesforce, blog5-asagarwal-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Lead/ButtonsLinksActions/09D2v00000KrbSj/view, Guest.
- Header:** Search Setup, with icons for Home, Object Manager, and various setup tools.
- Section:** SETUP > OBJECT MANAGER, Lead.
- Left Sidebar:** Buttons, Links, and Actions (selected), Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, Triggers, Validation Rules.
- Current View:** Lead Action New Task.
- Action Detail:**
 - Label: New Task
 - Standard Label Type: New [Record]
 - Name: New_Task
 - Description: Create a Task for multiple Lead records from a list view
 - Target Object: Task
 - Object Name: Lead
 - Action Type: Create a Record
 - Relationship Field: Name
 - Icon: (small icon)
 - Checkboxes: Create Feed Item (checked), Success Message.
 - Created By: Ashish Agarwal, 5/13/2020 9:55 PM
 - Modified By: Ashish Agarwal, 5/13/2020 9:55 PM
- Predefined Field Values:** No records to display.

A Quick Action is created. Now set it's predefined values.

Steps Overview

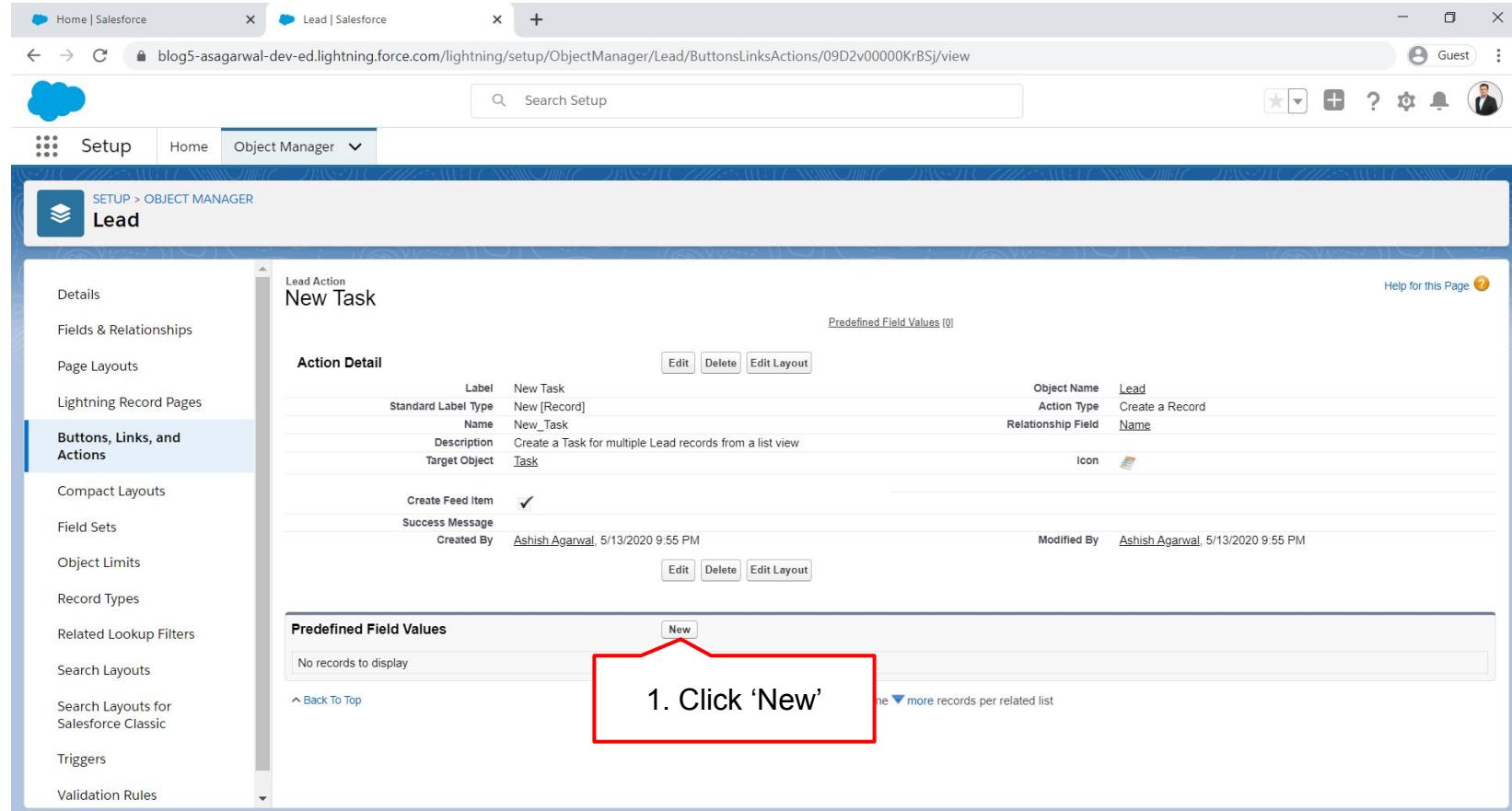
Create a Quick Action

 **Set Predefined Field Values**

Add Quick Action to Search Layout

Test Mass Quick Action

Set Predefined Field Values



The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main page displays the 'New Task' action detail for the 'Lead' object. The 'Buttons, Links, and Actions' section is highlighted in the sidebar. The 'Predefined Field Values' section at the bottom is shown with a red box around the 'New' button.

Action Detail

- Label: New Task
- Standard Label Type: New [Record]
- Name: New_Task
- Description: Create a Task for multiple Lead records from a list view
- Target Object: Task
- Object Name: Lead
- Action Type: Create a Record
- Relationship Field: Name
- Icon: 

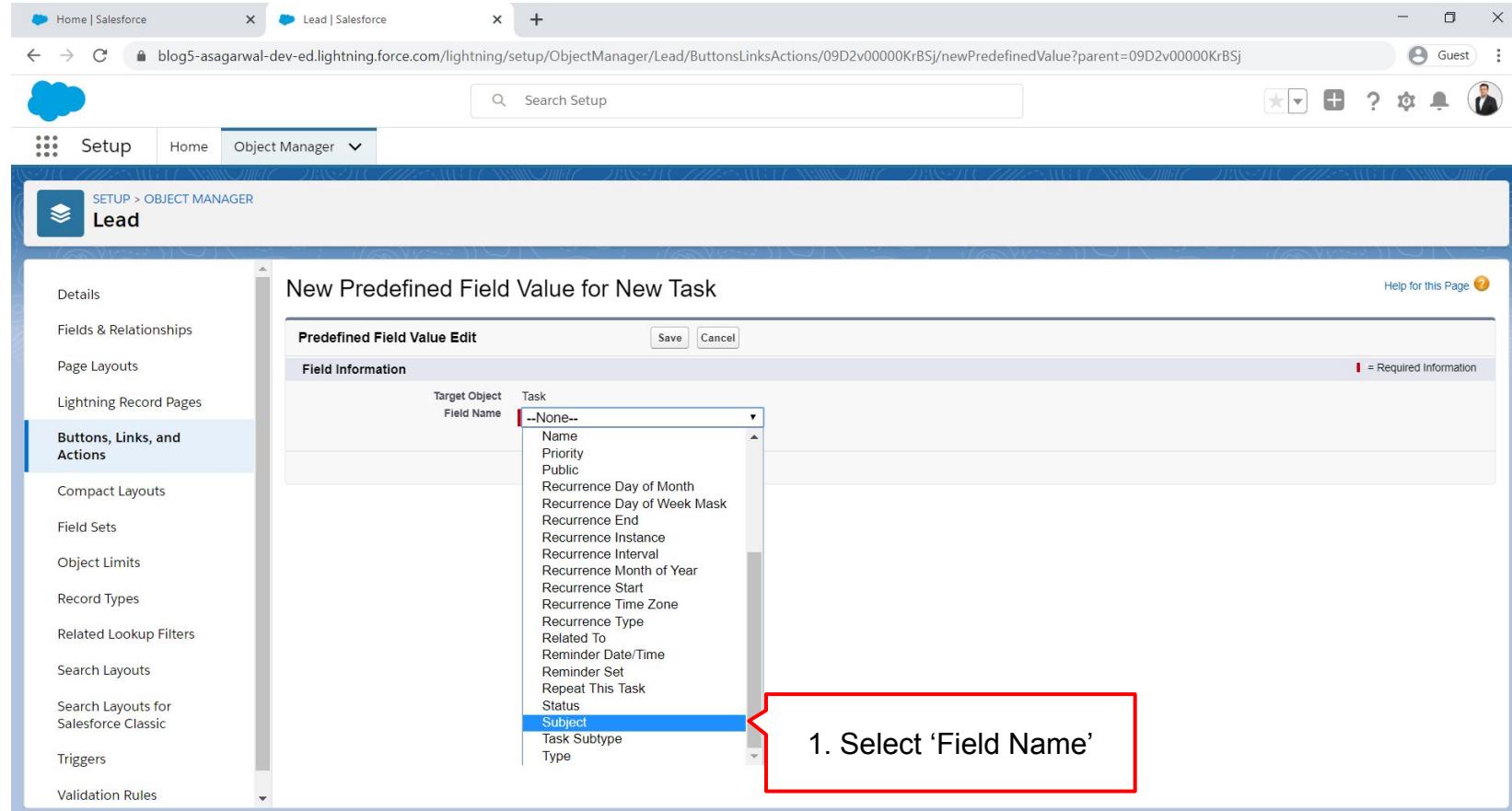
Predefined Field Values (0)

Predefined Field Values

No records to display

1. Click 'New'

Set Predefined Field Values

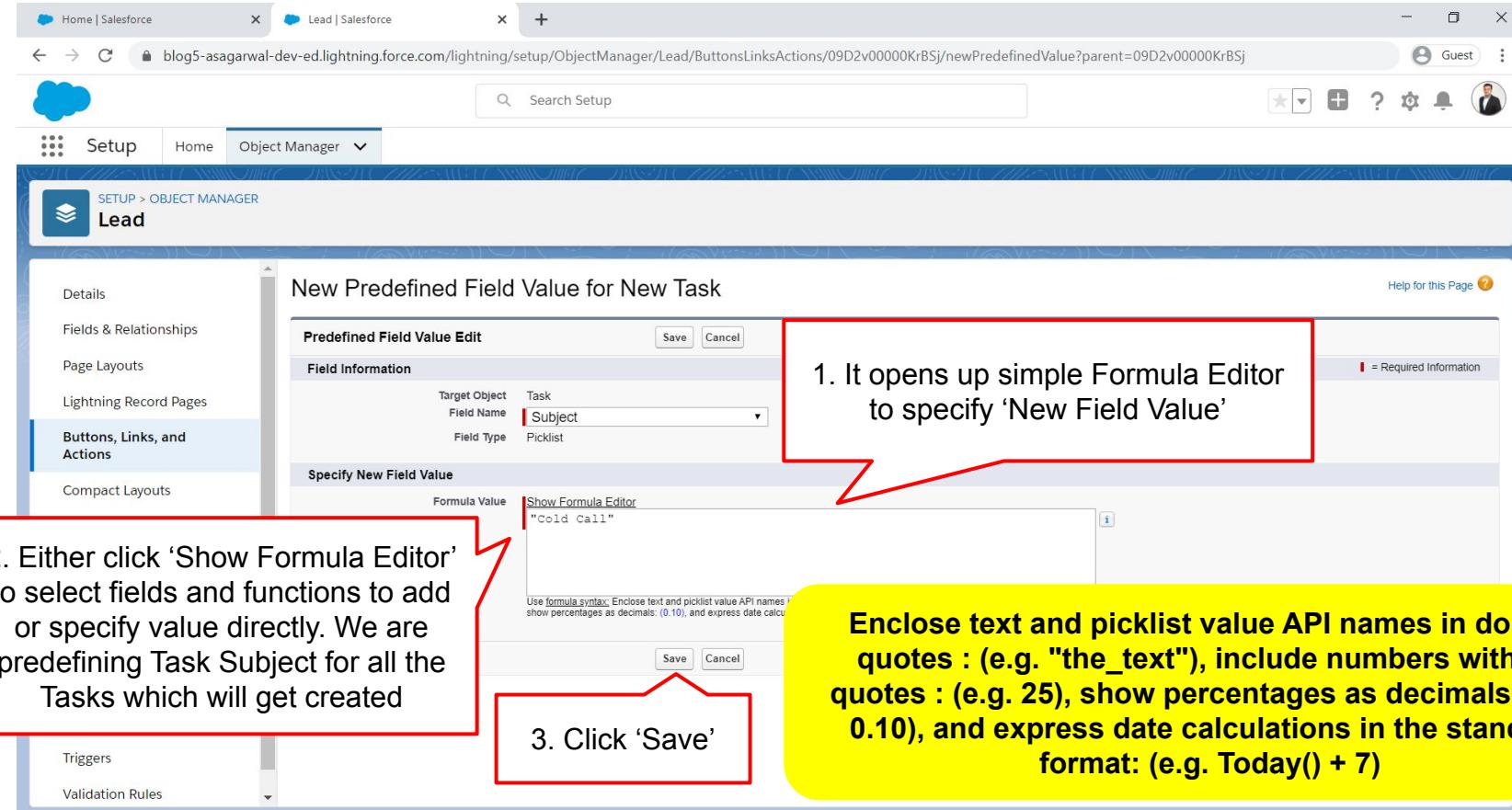


The screenshot shows the Salesforce Setup interface with the following details:

- Setup** tab is selected in the top navigation bar.
- Object Manager** is selected in the sub-navigation bar.
- Lead** object is selected in the main content area.
- Buttons, Links, and Actions** is the selected category in the left sidebar.
- New Predefined Field Value for New Task** is the current page title.
- Predefined Field Value Edit** is the sub-page title.
- Field Information** is the section title.
- Target Object** is set to **Task**.
- Field Name** dropdown menu is open, showing the following options:
 - None--
 - Name
 - Priority
 - Public
 - Recurrence Day of Month
 - Recurrence Day of Week Mask
 - Recurrence End
 - Recurrence Instance
 - Recurrence Interval
 - Recurrence Month of Year
 - Recurrence Start
 - Recurrence Time Zone
 - Recurrence Type
 - Related To
 - Reminder Date/Time
 - Reminder Set
 - Repeat This Task
 - Status
 - Subject** (highlighted with a red box)
 - Task Subtype
 - Type

1. Select 'Field Name'

Set Predefined Field Values



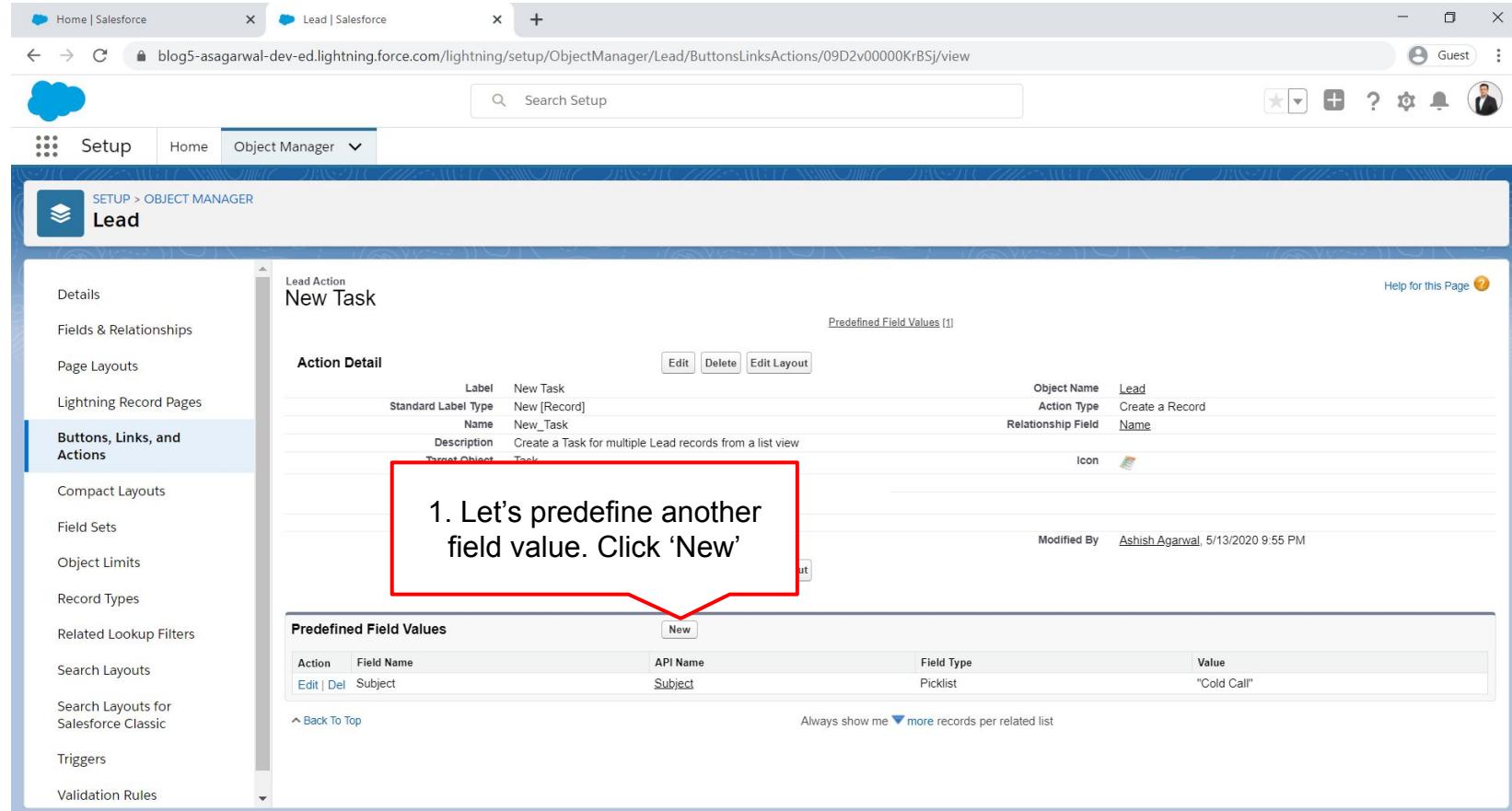
1. It opens up simple Formula Editor to specify 'New Field Value'

2. Either click 'Show Formula Editor' to select fields and functions to add or specify value directly. We are predefining Task Subject for all the Tasks which will get created

3. Click 'Save'

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

Set Predefined Field Values



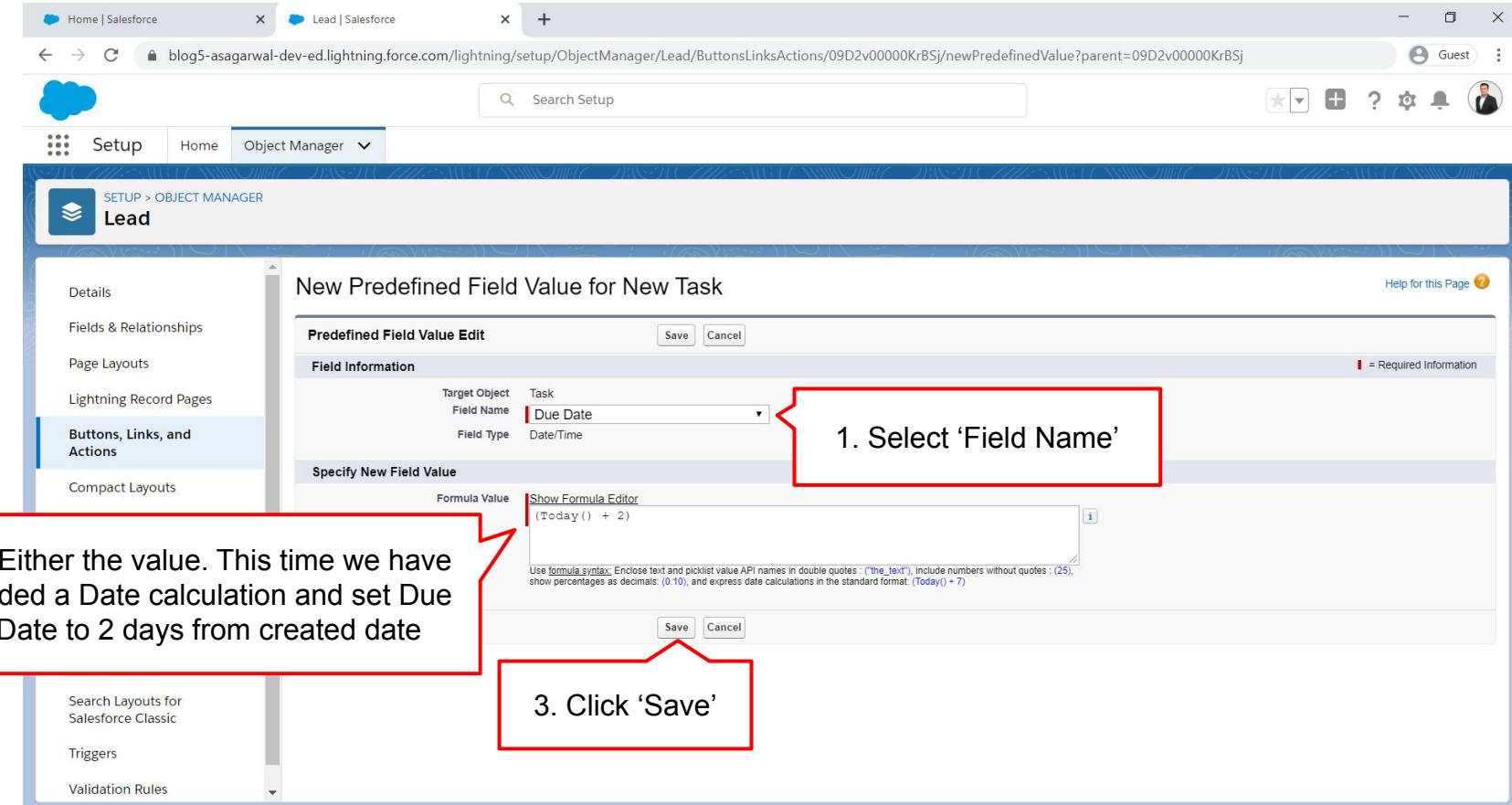
The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main page displays the 'Lead Action New Task' configuration. A red box highlights the 'Predefined Field Values' section, which contains the following text and table:

1. Let's predefine another field value. Click 'New'

Action	Field Name	API Name	Field Type	Value
Edit Del	Subject	Subject	Picklist	"Cold Call"

Below the table, there are links to 'Back To Top' and 'Always show me more records per related list'.

Set Predefined Field Values



1. Select 'Field Name'

2. Either the value. This time we have added a Date calculation and set Due Date to 2 days from created date

3. Click 'Save'

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Search Layouts for Salesforce Classic

Triggers

Validation Rules

Lead

Search Setup

Help for this Page

Target Object: Task

Field Name: Due Date

Field Type: Date/Time

Formula Value: `(Today() + 2)`

Save Cancel

Set Predefined Field Values

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A yellow callout box on the right says: "Now let's add this brand new action to the list view in search layout." A red box highlights the 'Buttons, Links, and' section of the sidebar. A red arrow points from this section to the 'Predefined Field Values' list, which is also highlighted with a red box. The list shows several predefined field values for the 'New Task' action.

1. Similarly, we have predefined some more field values

Action	Field Name	API Name	Field Type	Value
Edit Del	Due Date	ActivityDate	Date/Time	(Today() + 2)
Edit Del	Priority	Priority	Picklist	Normal
Edit Del	Status	Status	Picklist	Not Started
Edit Del	Subject	Subject	Picklist	"Cold Call"
Edit Del	Type	Type	Picklist	Call

Steps Overview



Create a Quick Action



Set Predefined Field Values

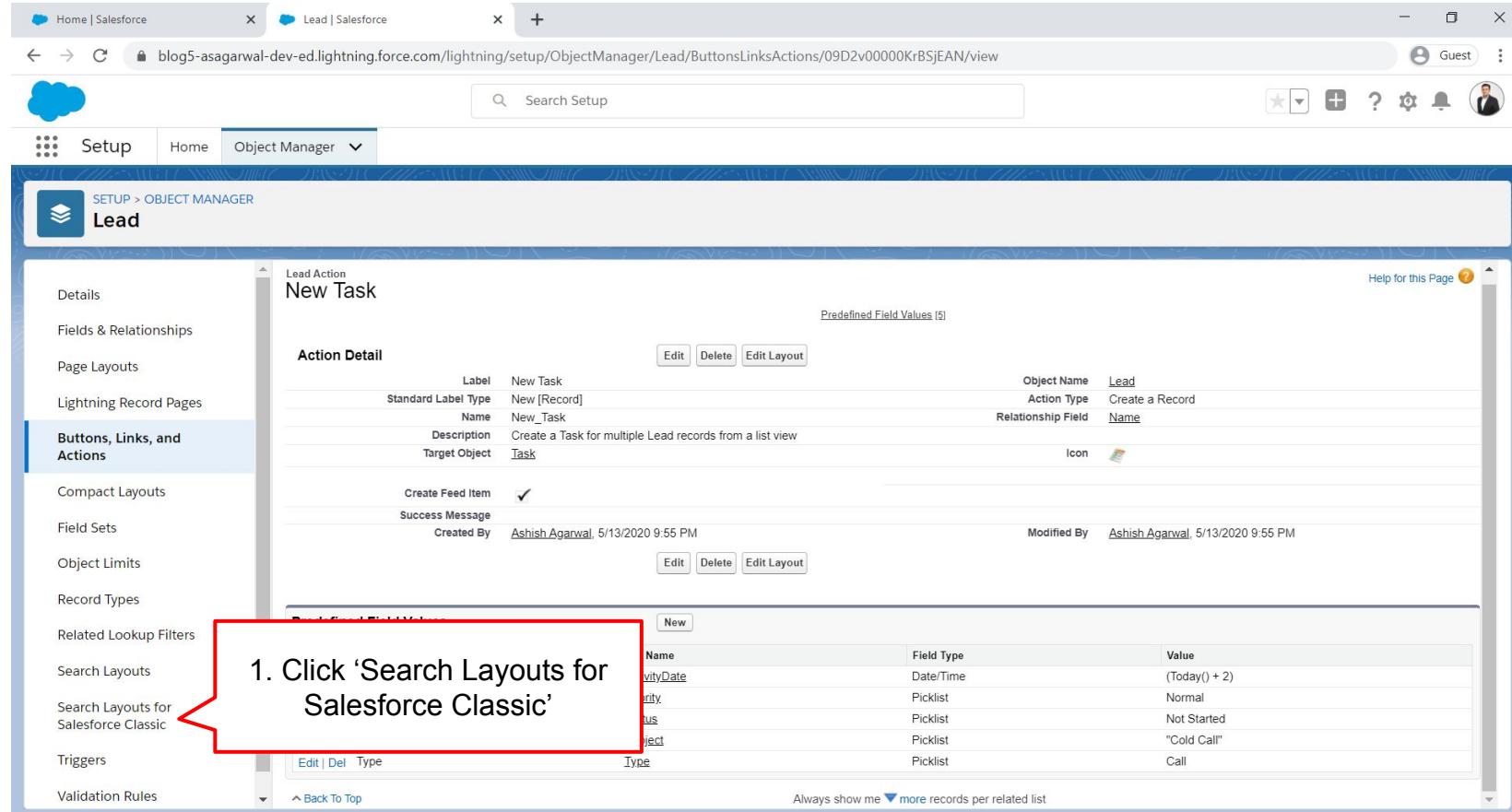


Add Quick Action to Search Layout



Test Mass Quick Action

Add Quick Action to Search Layout

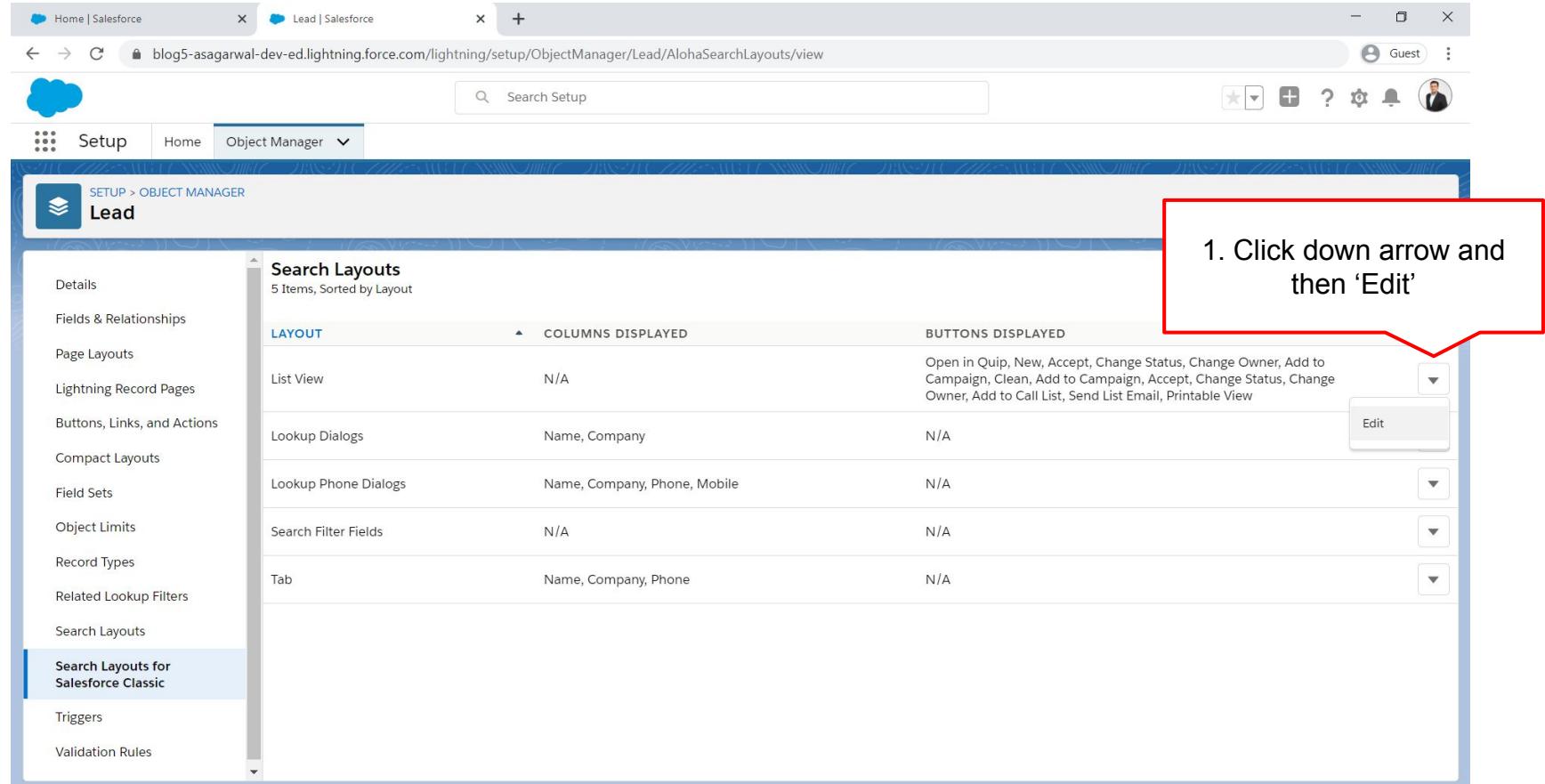


The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Home | Salesforce, Lead | Salesforce, blog5-asagarwal-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Lead/ButtonsLinksActions/09D2v00000KrBSjEAN/view, Guest.
- Search Bar:** Search Setup.
- Navigation:** Setup, Home, Object Manager.
- Section:** SETUP > OBJECT MANAGER, Lead.
- Left Sidebar:** Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions (selected), Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic (highlighted with a red box and a callout), Triggers, Validation Rules.
- Current Page:** Lead Action New Task.
- Action Detail:** Label: New Task, Standard Label Type: New [Record], Name: New_Task, Description: Create a Task for multiple Lead records from a list view, Target Object: Task, Object Name: Lead, Action Type: Create a Record, Relationship Field: Name, Icon: (small image).
- Success Message:** Create Feed Item: , Success Message: Created By: Ashish Agarwal, 5/13/2020 9:55 PM, Modified By: Ashish Agarwal, 5/13/2020 9:55 PM.
- Table:** A table showing field values for the new action, including Name, Field Type, and Value.

Callout: A red callout points to the 'Search Layouts for Salesforce Classic' item in the sidebar with the text: "1. Click 'Search Layouts for Salesforce Classic'".

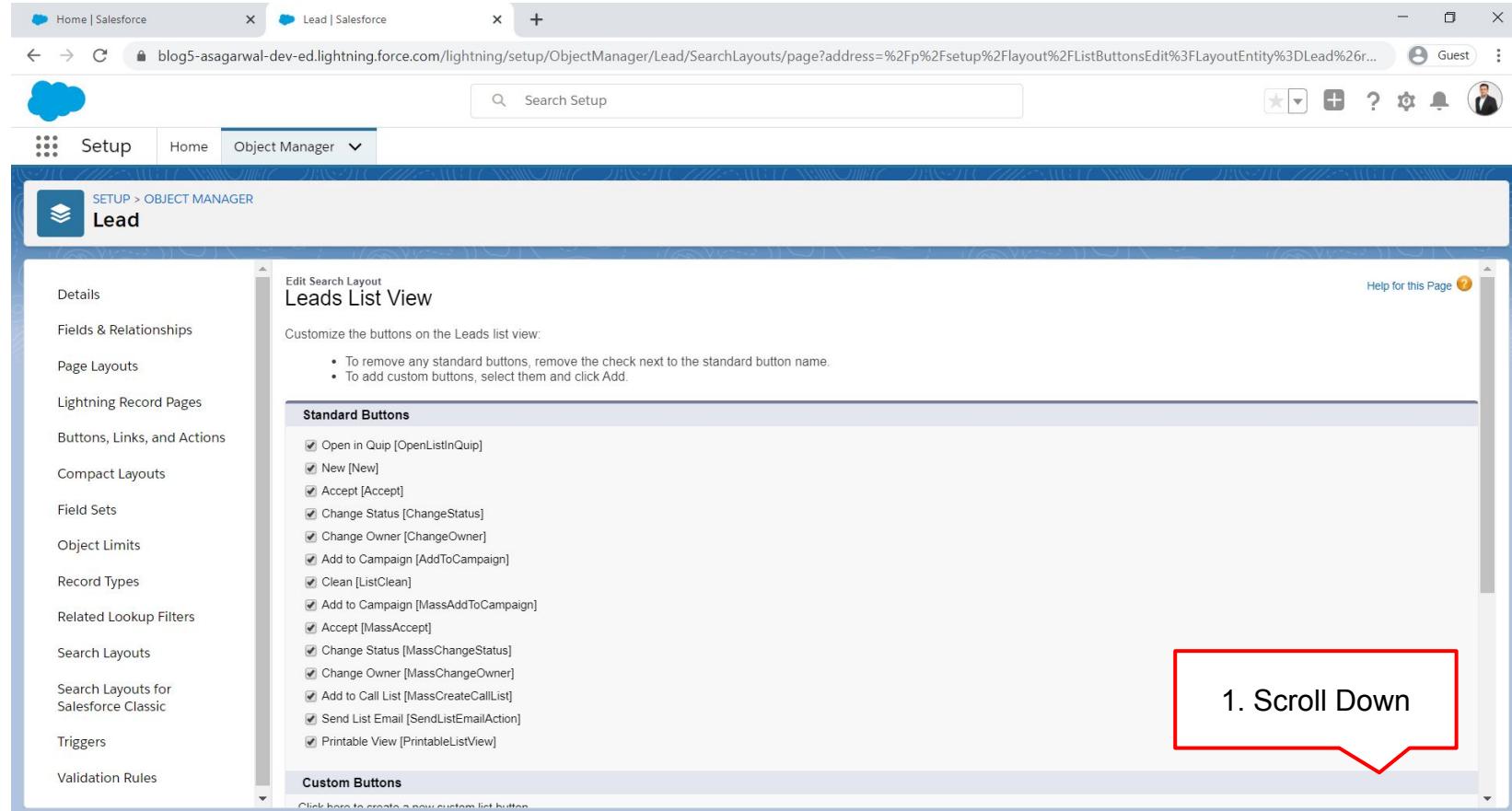
Add Quick Action to Search Layout



1. Click down arrow and then 'Edit'

LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED
List View	N/A	Open in Quip, New, Accept, Change Status, Change Owner, Add to Campaign, Clean, Add to Campaign, Accept, Change Status, Change Owner, Add to Call List, Send List Email, Printable View
Lookup Dialogs	Name, Company	N/A
Lookup Phone Dialogs	Name, Company, Phone, Mobile	N/A
Search Filter Fields	N/A	N/A
Tab	Name, Company, Phone	N/A

Add Quick Action to Search Layout



Home | Salesforce Lead | Salesforce

blog5-asagarwal-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Lead/SearchLayouts/page?address=%2Fp%2Fsetup%2Flayout%2FListButtonsEdit%3FLayoutEntity%3DLead%26r...

Guest

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Lead

Details

Fields & Relationships

Page Layouts

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

Validation Rules

Leads List View

Customize the buttons on the Leads list view:

- To remove any standard buttons, remove the check next to the standard button name.
- To add custom buttons, select them and click Add.

Help for this Page ?

Standard Buttons

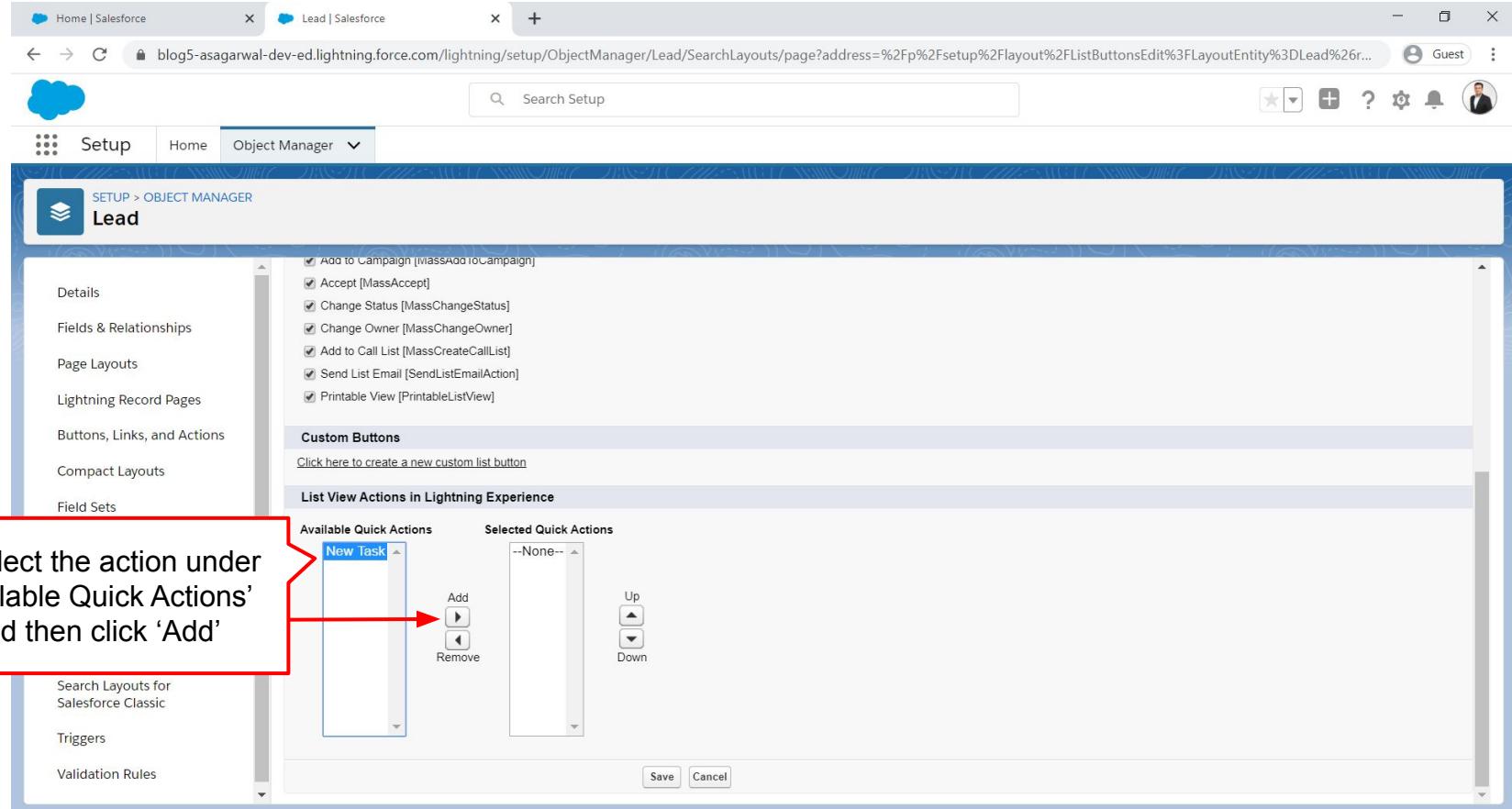
- Open in Quip [OpenListInQuip]
- New [New]
- Accept [Accept]
- Change Status [ChangeStatus]
- Change Owner [ChangeOwner]
- Add to Campaign [AddToCampaign]
- Clean [ListClean]
- Add to Campaign [MassAddToCampaign]
- Accept [MassAccept]
- Change Status [MassChangeStatus]
- Change Owner [MassChangeOwner]
- Add to Call List [MassCreateCallList]
- Send List Email [SendListEmailAction]
- Printable View [PrintableListView]

Custom Buttons

Click here to create a new custom list button

1. Scroll Down

Add Quick Action to Search Layout



1. Select the action under 'Available Quick Actions' and then click 'Add'

Available Quick Actions

- New Task

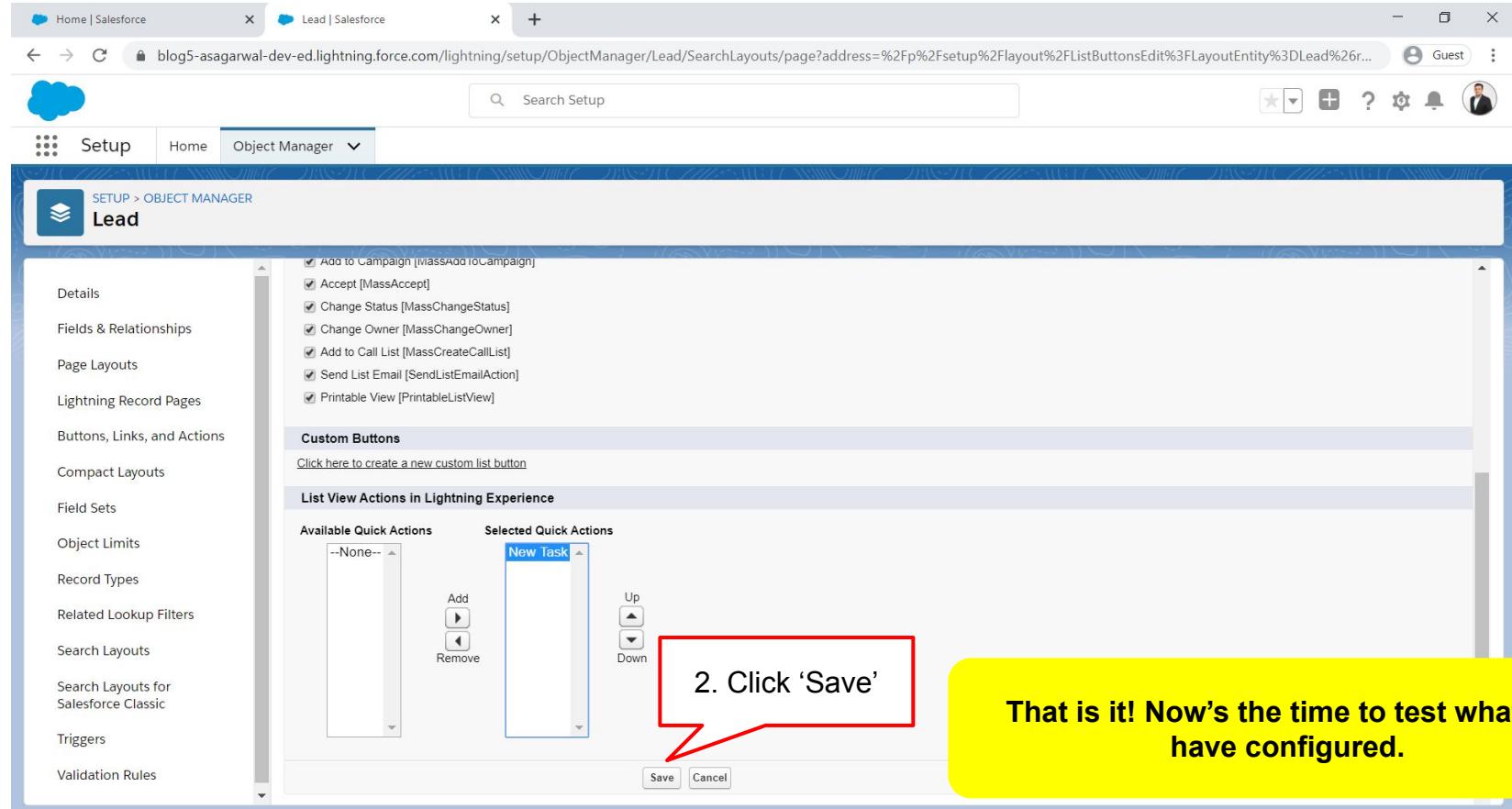
Selected Quick Actions

- None--

Add Remove Up Down

Save Cancel

Add Quick Action to Search Layout



The screenshot shows the Salesforce Setup interface for the Lead object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main content area is titled 'Lead' and shows a list of quick actions for the Lead object. A red box highlights the 'New Task' quick action in the 'Selected Quick Actions' list. A red arrow points from the text '2. Click 'Save'' to the 'Save' button at the bottom of the configuration pane. A yellow callout box contains the text 'That is it! Now's the time to test what we have configured.'

2. Click 'Save'

That is it! Now's the time to test what we have configured.

Steps Overview



Create a Quick Action



Set Predefined Field Values



Add Quick Action to Search Layout



Test Mass Quick Action

Test Mass Quick Action

Home | Salesforce | Users | Salesforce | Home | Salesforce

blog5-asagarwal-dev-ed.lightning.force.com/lightning/page/home

Logged in as Nick Adams () Log out as Nick Adams

1. We are logged in as Nick Adams, a Sales Rep

Assistant

- >  [Jackelin Mooney](#)
- >  [Marigold Parr](#)
- >  [Bart Morris](#)
- >  [Kendra Widdows](#)
- >  [Doug Russel](#)
- >  [Luke Patterson](#)
- >  [Emily Wong](#)
- >  [Jeff Jackson](#)
- >  [Lindsay Downing](#)
- >  [David Shields](#)

Chatter Groups Calendar More

Quarterly Performance

CLOSED \$0 OPEN (>70%) \$0 GOAL --

500K
400K
300K
200K
100K
0

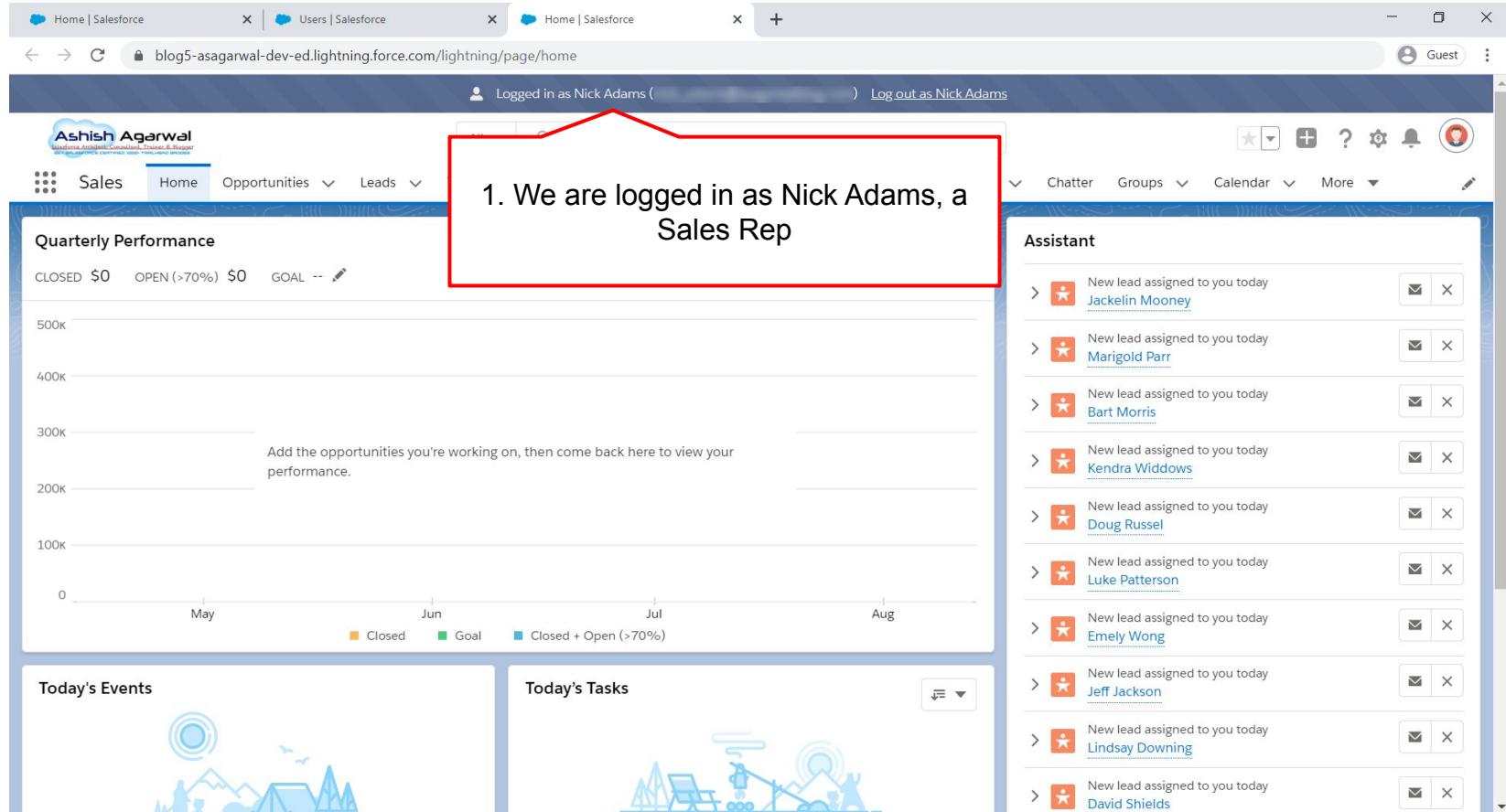
Add the opportunities you're working on, then come back here to view your performance.

May Jun Jul Aug

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

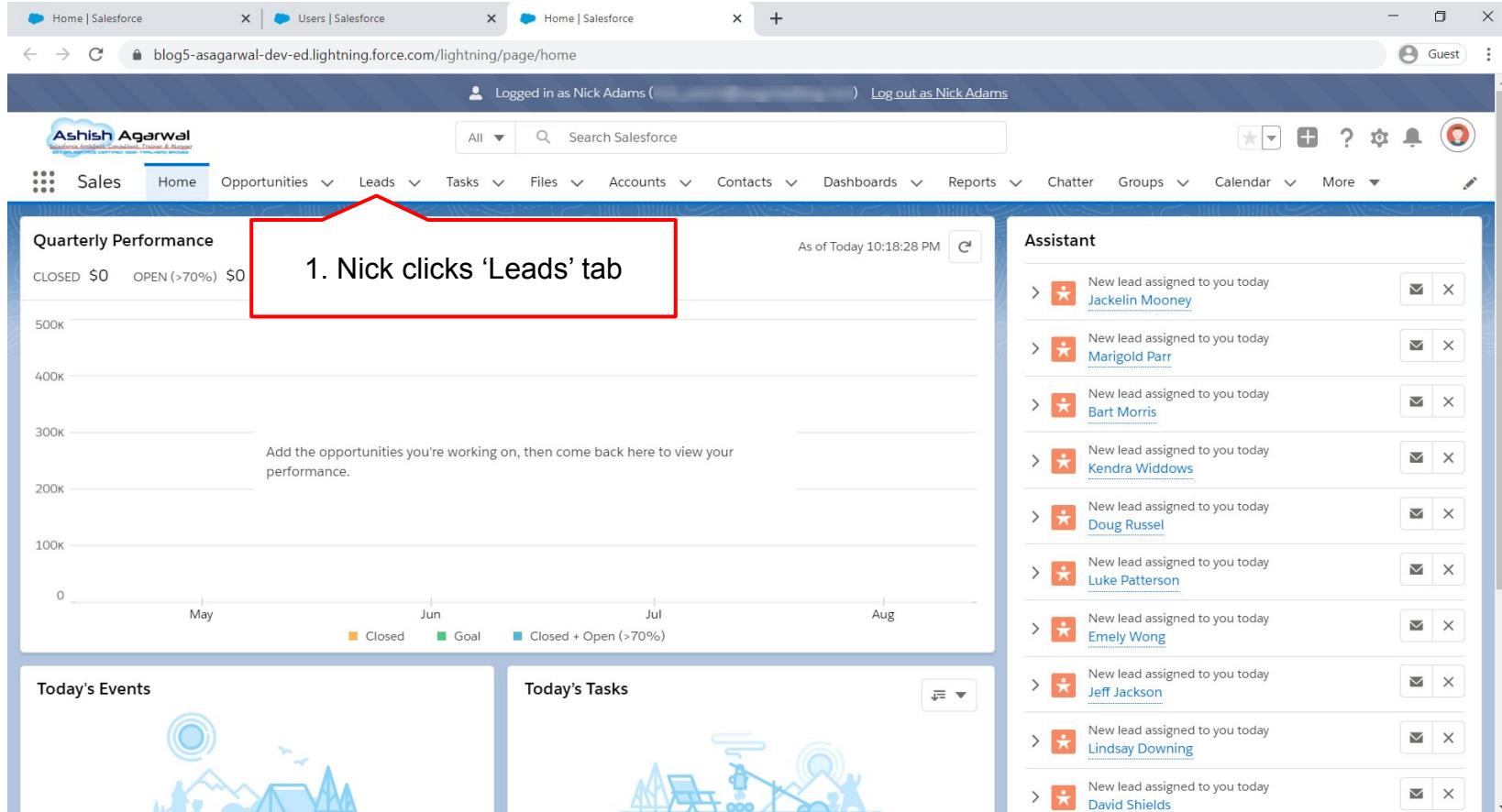
Today's Events

Today's Tasks



Visit asagarwal.com for useful tips and tricks on Salesforce

Test Mass Quick Action

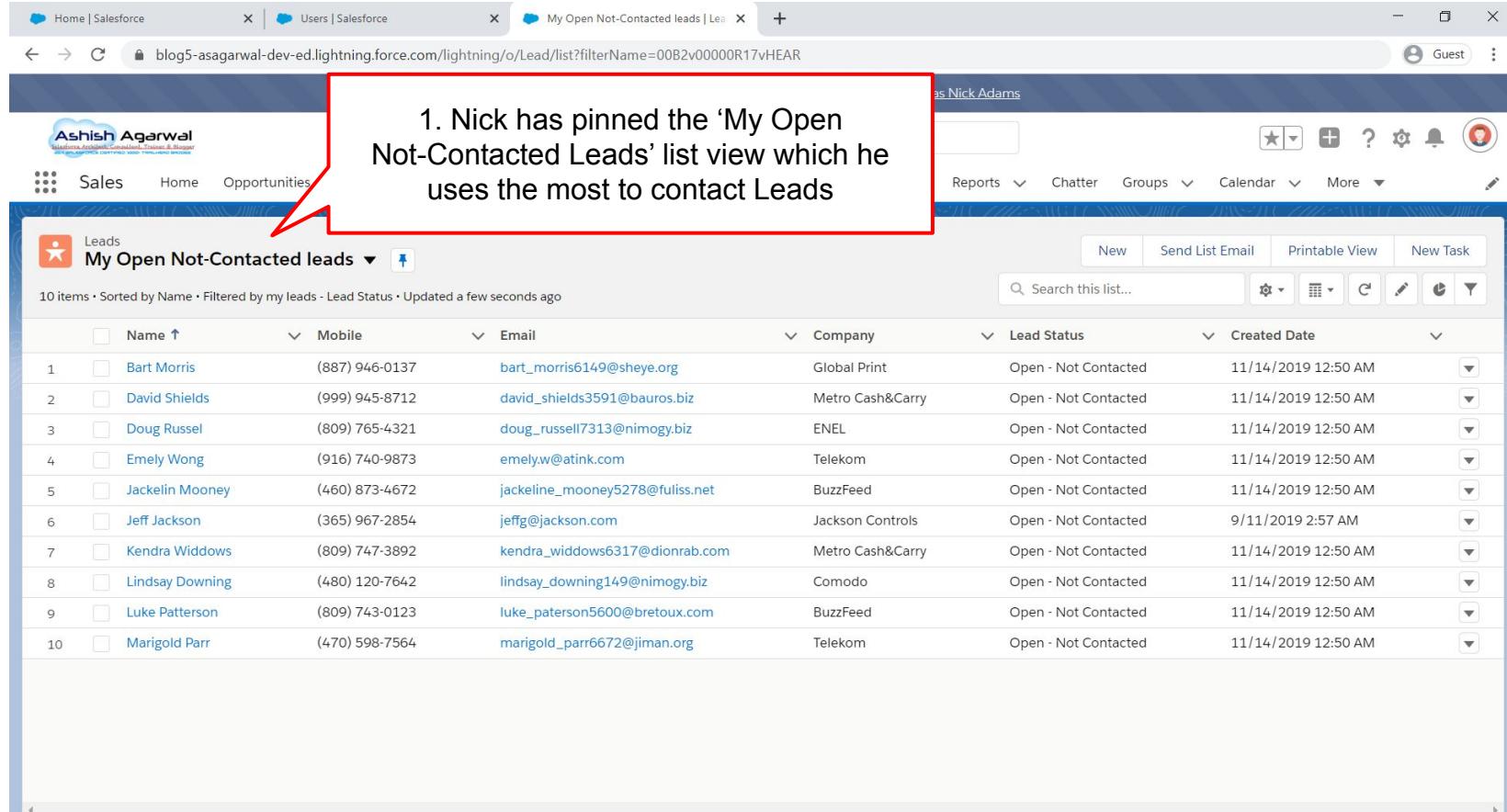


The screenshot shows the Salesforce Lightning Home page. The top navigation bar has three tabs: 'Home | Salesforce', 'Users | Salesforce', and 'Home | Salesforce'. The main content area is titled 'Quarterly Performance' and shows a line chart for 'CLOSED \$0' and 'OPEN (>70%) \$0'. A red box highlights the 'Leads' tab in the top navigation bar, with the text '1. Nick clicks 'Leads' tab' inside it. To the right is the 'Assistant' sidebar, which lists ten new leads assigned to the user today, each with a 'Mark as Read' and 'X' button.

1. Nick clicks 'Leads' tab

Lead Name	Action
Jackelin Mooney	<input type="checkbox"/> X
Marigold Parr	<input type="checkbox"/> X
Bart Morris	<input type="checkbox"/> X
Kendra Widdows	<input type="checkbox"/> X
Doug Russel	<input type="checkbox"/> X
Luke Patterson	<input type="checkbox"/> X
Emily Wong	<input type="checkbox"/> X
Jeff Jackson	<input type="checkbox"/> X
Lindsay Downing	<input type="checkbox"/> X
David Shields	<input type="checkbox"/> X

Test Mass Quick Action



1. Nick has pinned the 'My Open Not-Contacted Leads' list view which he uses the most to contact Leads

The screenshot shows a Salesforce Lightning interface. At the top, there are three tabs: 'Home | Salesforce', 'Users | Salesforce', and 'My Open Not-Contacted leads | Leads'. The current view is 'My Open Not-Contacted leads'. The page title is 'My Open Not-Contacted leads'. The main content is a table with 10 items, sorted by Name. The columns are: Name (with a升序sort icon), Mobile, Email, Company, Lead Status, and Created Date. Each row contains a checkbox in the first column. The table data is as follows:

	Name ↑	Mobile	Email	Company	Lead Status	Created Date
1	Bart Morris	(887) 946-0137	bart_morris6149@sheye.org	Global Print	Open - Not Contacted	11/14/2019 12:50 AM
2	David Shields	(999) 945-8712	david_shields3591@bauros.biz	Metro Cash&Carry	Open - Not Contacted	11/14/2019 12:50 AM
3	Doug Russel	(809) 765-4321	doug_russell7313@nimogy.biz	ENEL	Open - Not Contacted	11/14/2019 12:50 AM
4	Emely Wong	(916) 740-9873	emely.w@atink.com	Telekom	Open - Not Contacted	11/14/2019 12:50 AM
5	Jackelin Mooney	(460) 873-4672	jackeline_mooney5278@fuliss.net	BuzzFeed	Open - Not Contacted	11/14/2019 12:50 AM
6	Jeff Jackson	(365) 967-2854	jeffg@jackson.com	Jackson Controls	Open - Not Contacted	9/11/2019 2:57 AM
7	Kendra Widdows	(809) 747-3892	kendra_widdows6317@dionrab.com	Metro Cash&Carry	Open - Not Contacted	11/14/2019 12:50 AM
8	Lindsay Downing	(480) 120-7642	lindsay_downing149@nimogy.biz	Comodo	Open - Not Contacted	11/14/2019 12:50 AM
9	Luke Patterson	(809) 743-0123	luke_paterson5600@bretoux.com	BuzzFeed	Open - Not Contacted	11/14/2019 12:50 AM
10	Marigold Parr	(470) 598-7564	marigold_parr6672@jiman.org	Telekom	Open - Not Contacted	11/14/2019 12:50 AM

Test Mass Quick Action

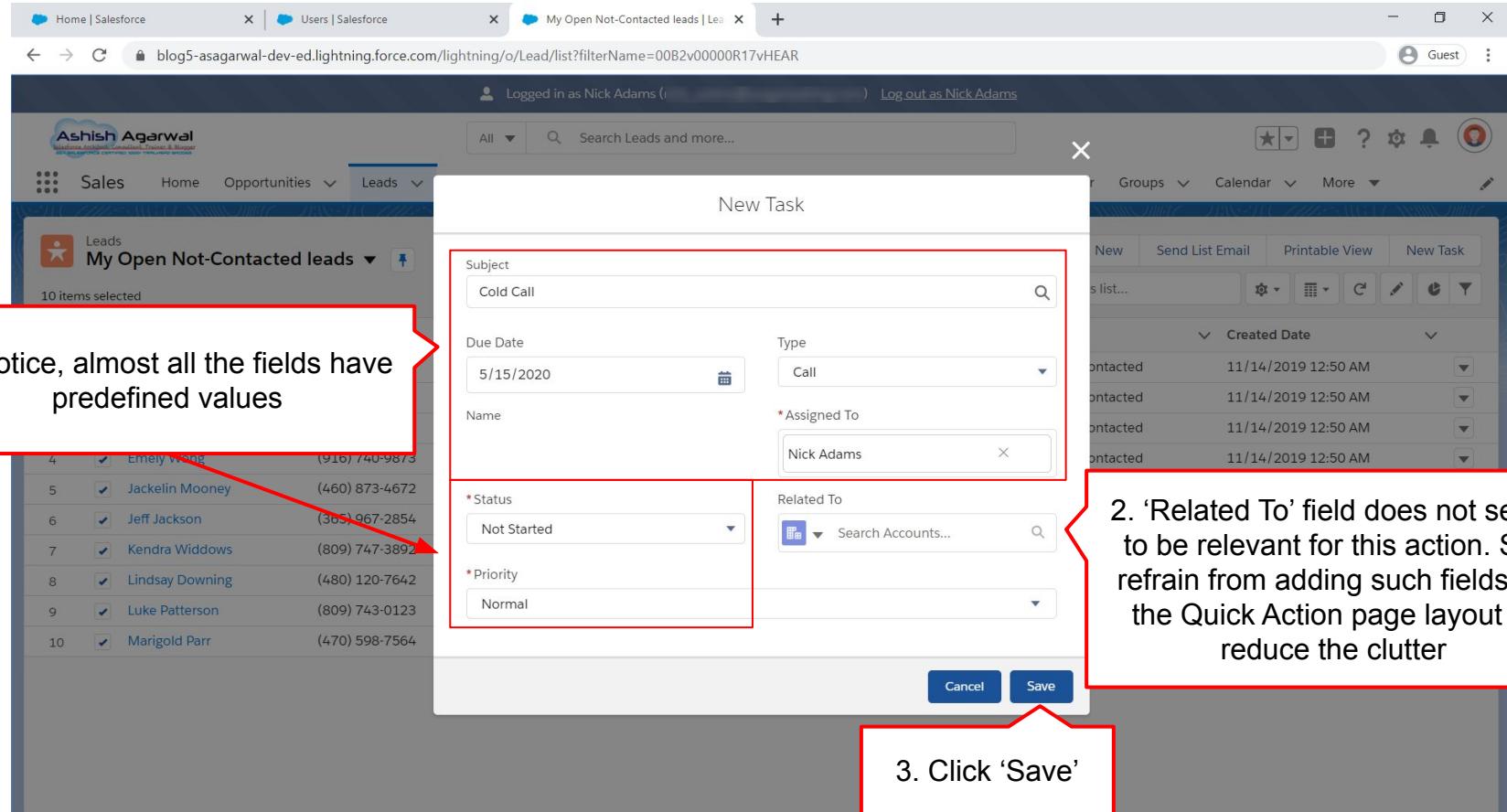
1. Ticks the checkbox to select all the Lead records. He needs to call them today.

2. Clicks 'New Task'

10 items

	<input checked="" type="checkbox"/> Name ↑	Mobile	Email	Company	Lead Status	Created Date	
1	<input checked="" type="checkbox"/> Bart Morris	(887) 946-0137	bart_morris6149@sheye.org	Global Print	Open - Not Contacted	11/14/2019 12:50 AM	<input type="button" value="View"/>
2	<input checked="" type="checkbox"/> David Shields	(999) 945-8712	david_shields3591@bauros.biz	Metro Cash&Carry	Open - Not Contacted	11/14/2019 12:50 AM	<input type="button" value="View"/>
3	<input checked="" type="checkbox"/> Doug Russel	(809) 765-4321	doug_russell7313@nimogy.biz	ENEL	Open - Not Contacted	11/14/2019 12:50 AM	<input type="button" value="View"/>
4	<input checked="" type="checkbox"/> Emely Wong	(916) 740-9873	emely.w@atink.com	Telekom	Open - Not Contacted	11/14/2019 12:50 AM	<input type="button" value="View"/>
5	<input checked="" type="checkbox"/> Jackelin Mooney	(460) 873-4672	jackeline_mooney5278@fuliss.net	BuzzFeed	Open - Not Contacted	11/14/2019 12:50 AM	<input type="button" value="View"/>
6	<input checked="" type="checkbox"/> Jeff Jackson	(365) 967-2854	jeffg@jackson.com	Jackson Controls	Open - Not Contacted	9/11/2019 2:57 AM	<input type="button" value="View"/>
7	<input checked="" type="checkbox"/> Kendra Widdows	(809) 747-3892	kendra_widdows6317@dionrab.com	Metro Cash&Carry	Open - Not Contacted	11/14/2019 12:50 AM	<input type="button" value="View"/>
8	<input checked="" type="checkbox"/> Lindsay Downing	(480) 120-7642	lindsay_downing149@nimogy.biz	Comodo	Open - Not Contacted	11/14/2019 12:50 AM	<input type="button" value="View"/>
9	<input checked="" type="checkbox"/> Luke Patterson	(809) 743-0123	luke_paterson5600@bretoux.com	BuzzFeed	Open - Not Contacted	11/14/2019 12:50 AM	<input type="button" value="View"/>
10	<input checked="" type="checkbox"/> Marigold Parr	(470) 598-7564	marigold_parr6672@jiman.org	Telekom	Open - Not Contacted	11/14/2019 12:50 AM	<input type="button" value="View"/>

Test Mass Quick Action



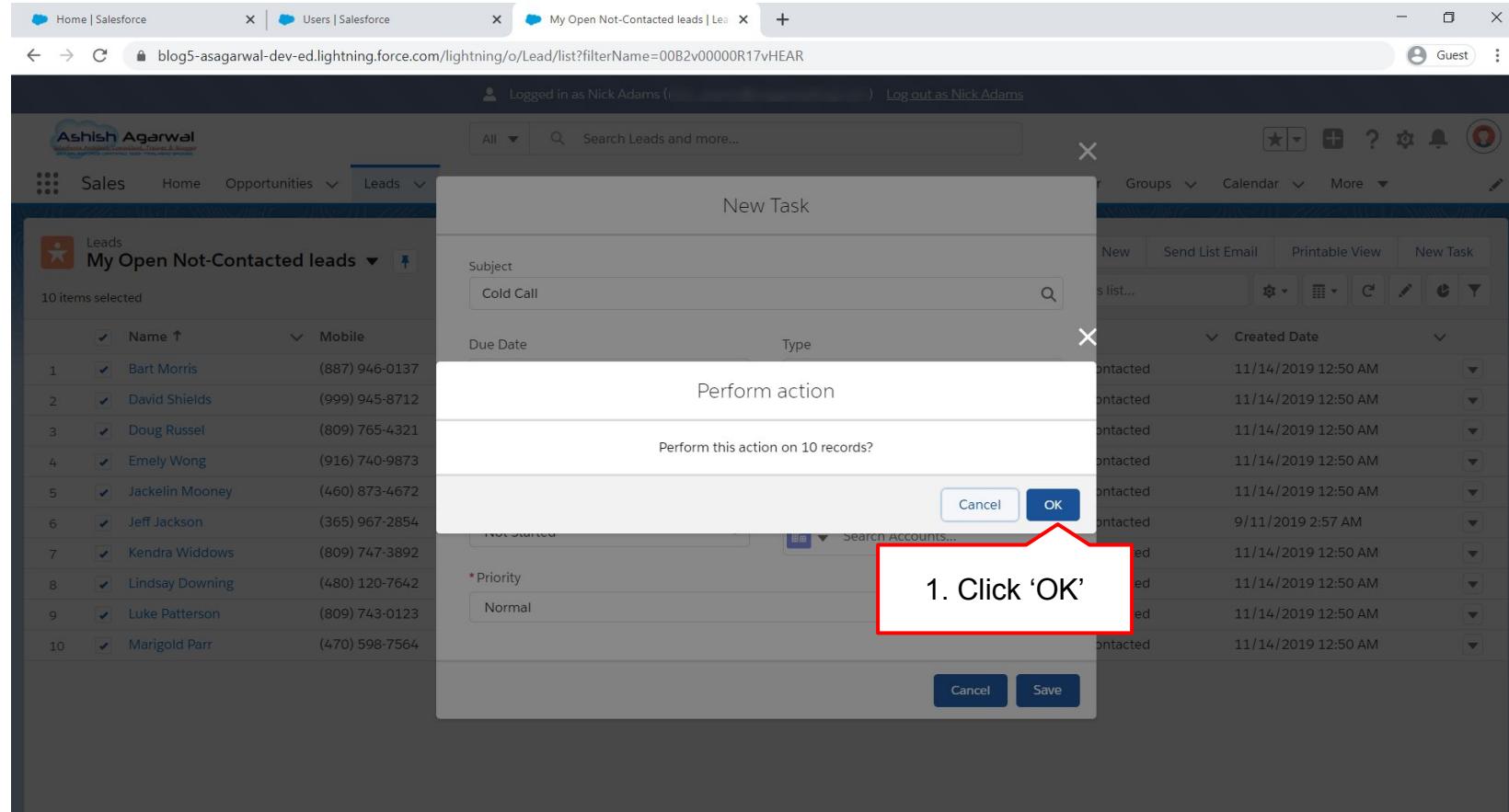
1. Notice, almost all the fields have predefined values

2. 'Related To' field does not seem to be relevant for this action. So, refrain from adding such fields on the Quick Action page layout to reduce the clutter

3. Click 'Save'

The screenshot shows a Salesforce Lightning interface. A 'New Task' dialog box is open in the foreground, overlaid on a list of leads. The dialog contains fields for Subject (Cold Call), Due Date (5/15/2020), Type (Call), Name (Nick Adams), Status (Not Started), and Priority (Normal). A red box highlights these fields. In the background, a list of 10 leads is visible, each with a checkbox and a name/phone number pair. A red box highlights the first lead in the list. The top navigation bar shows tabs for Home, Users, and My Open Not-Contacted leads. The sidebar on the left shows Sales, Home, Opportunities, and Leads. The main area title is 'My Open Not-Contacted leads'.

Test Mass Quick Action



Home | Salesforce | Users | Salesforce | My Open Not-Contacted leads | Lead

blog5-asagarwal-dev-ed.lightning.force.com/lightning/o/Lead/list?filterName=00B2v00000R17vHEAR

Logged in as Nick Adams (Guest) Log out as Nick Adams

Ashish Agarwal
Salesforce Certified Admin & Developer

Sales Home Opportunities Leads

Leads

My Open Not-Contacted leads

10 items selected

	Name	Mobile
1	Bart Morris	(887) 946-0137
2	David Shields	(999) 945-8712
3	Doug Russel	(809) 765-4321
4	Emely Wong	(916) 740-9873
5	Jackelin Mooney	(460) 873-4672
6	Jeff Jackson	(365) 967-2854
7	Kendra Widdows	(809) 747-3892
8	Lindsay Downing	(480) 120-7642
9	Luke Patterson	(809) 743-0123
10	Marigold Parr	(470) 598-7564

New Task

Subject: Cold Call

Due Date:

Type:

Perform action

Perform this action on 10 records?

Cancel OK

Not Started

Search Accounts...

Priority: Normal

Cancel Save

1. Click 'OK'

New Send List Email Printable View New Task

Groups Calendar More

Created Date

11/14/2019 12:50 AM

9/11/2019 2:57 AM

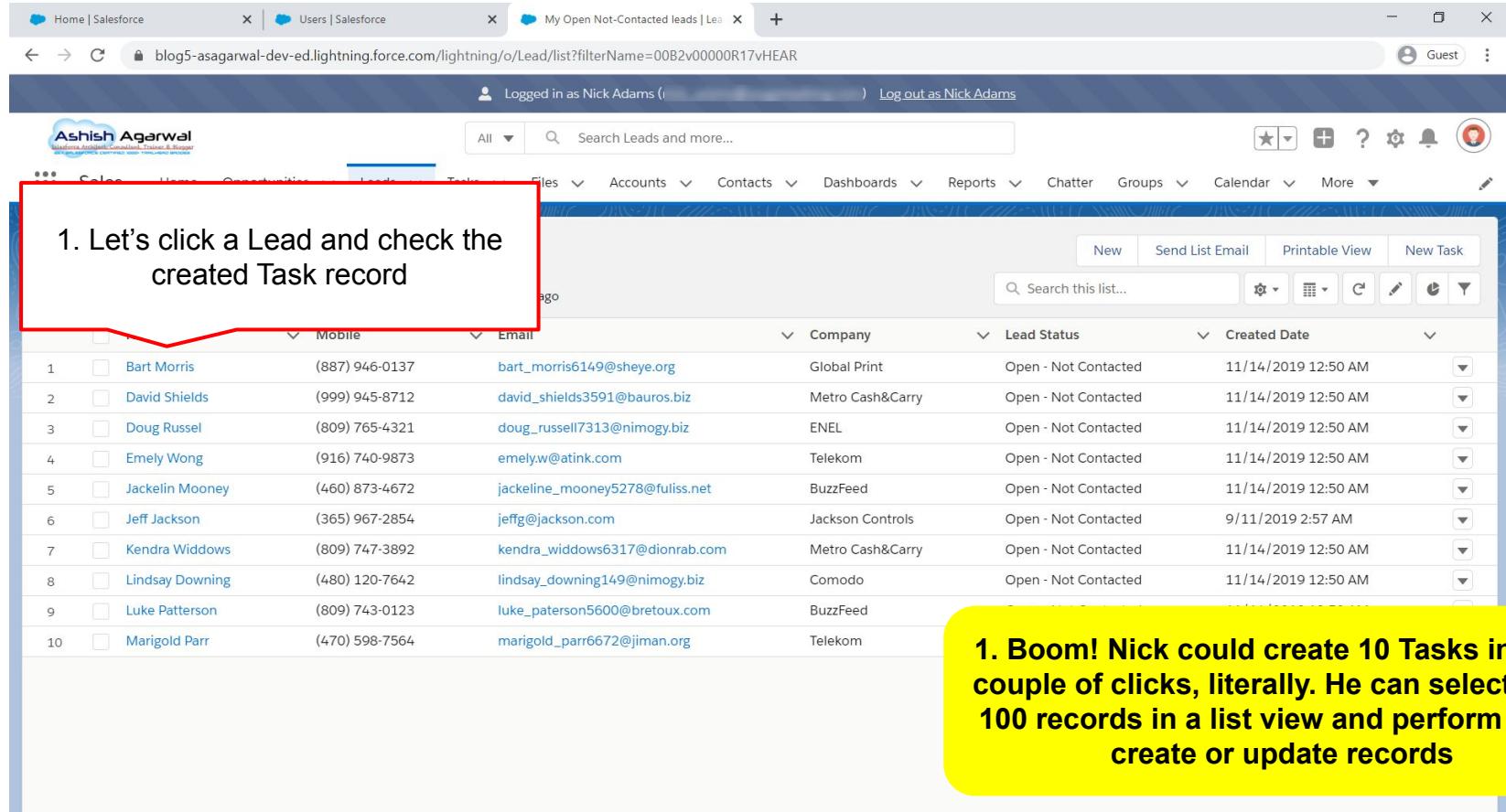
11/14/2019 12:50 AM

11/14/2019 12:50 AM

11/14/2019 12:50 AM

11/14/2019 12:50 AM

Test Mass Quick Action

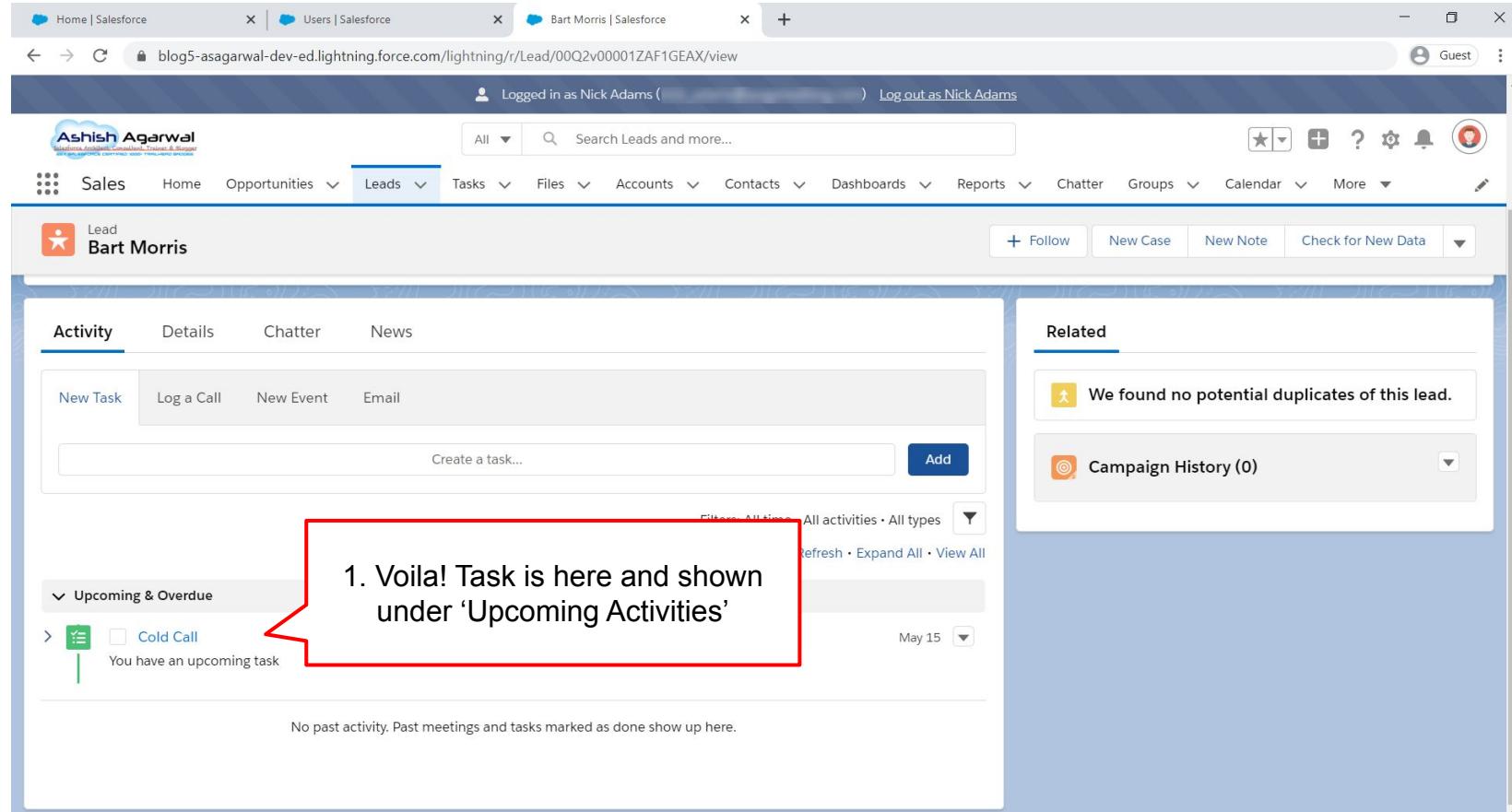


1. Let's click a Lead and check the created Task record

Mobile	Email	Company	Lead Status	Created Date
(887) 946-0137	bart_morris6149@sheye.org	Global Print	Open - Not Contacted	11/14/2019 12:50 AM
(999) 945-8712	david_shields3591@bauros.biz	Metro Cash&Carry	Open - Not Contacted	11/14/2019 12:50 AM
(809) 765-4321	doug_russell7313@nimogy.biz	ENEL	Open - Not Contacted	11/14/2019 12:50 AM
(916) 740-9873	emely.w@atink.com	Telekom	Open - Not Contacted	11/14/2019 12:50 AM
(460) 873-4672	jackeline_mooney5278@fuliss.net	BuzzFeed	Open - Not Contacted	11/14/2019 12:50 AM
(365) 967-2854	jeffg@jackson.com	Jackson Controls	Open - Not Contacted	9/11/2019 2:57 AM
(809) 747-3892	kendra_widdows6317@dionrab.com	Metro Cash&Carry	Open - Not Contacted	11/14/2019 12:50 AM
(480) 120-7642	lindsay_downing149@nimogy.biz	Comodo	Open - Not Contacted	11/14/2019 12:50 AM
(809) 743-0123	luke_paterson5600@bretoux.com	BuzzFeed		
(470) 598-7564	marigold_parr6672@jiman.org	Telekom		

1. Boom! Nick could create 10 Tasks in just a couple of clicks, literally. He can select up to 100 records in a list view and perform mass create or update records

Test Mass Quick Action



Home | Salesforce | Users | Salesforce | Bart Morris | Salesforce

blog5-asagarwal-dev-ed.lightning.force.com/lightning/r/Lead/00Q2v00001ZAF1GEAX/view

Logged in as Nick Adams (Guest) Log out as Nick Adams

Asish Agarwal

All Search Leads and more...

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

Lead Bart Morris

+ Follow New Case New Note Check for New Data

Activity Details Chatter News

New Task Log a Call New Event Email

Create a task... Add

Upcoming & Overdue

Cold Call

You have an upcoming task

1. Voila! Task is here and shown under 'Upcoming Activities'

Related

We found no potential duplicates of this lead.

Campaign History (0)

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

Steps Overview



Create a Quick Action



Set Predefined Field Values



Add Quick Action to Search Layout



Test Mass Quick Action

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/how-to-set-up-mass-quick-action-in-salesforce>

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 !

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Document Change Log

Version	Changes
1.0	First Release