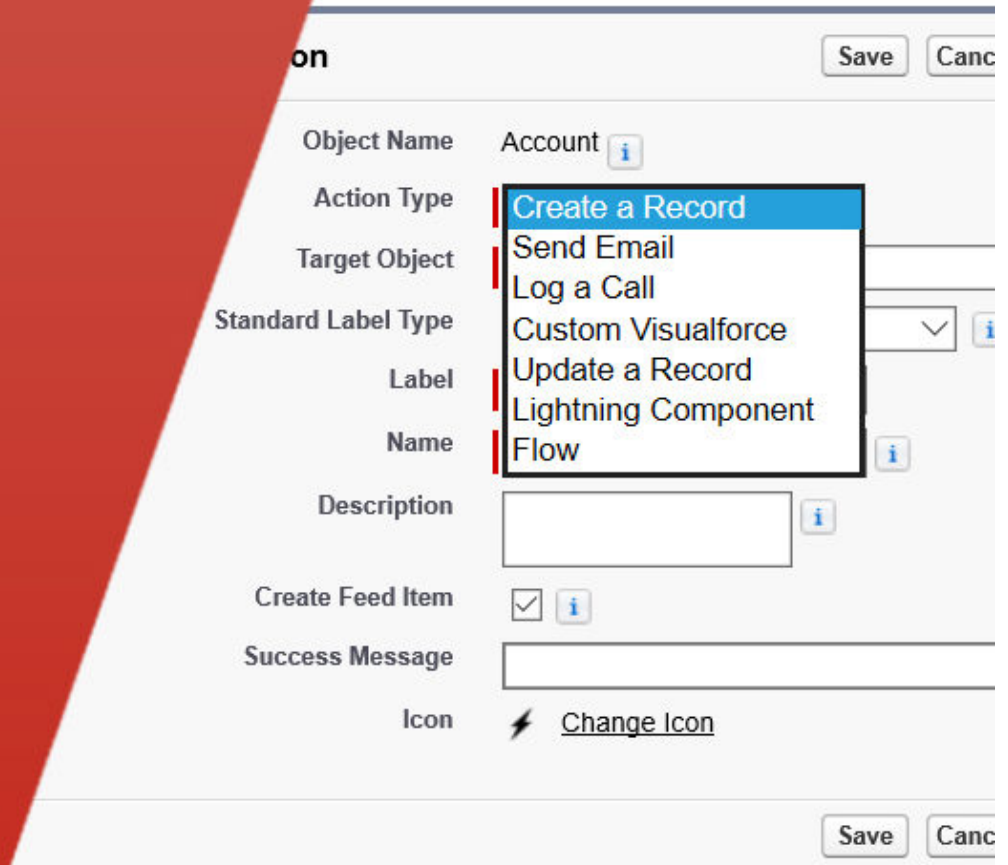


Object-Specific versus Global Actions in Lightning

by Mira Shah | Mar 19, 2020 | Lightning

OBJECT-SPECIFIC VERSUS GLOBAL ACTIONS IN LIGHTNING

MIRAFORCE.NET



The screenshot displays the Lightning Action configuration interface. The 'Object Name' is set to 'Account'. The 'Action Type' dropdown menu is open, showing the following options: 'Create a Record' (highlighted), 'Send Email', 'Log a Call', 'Custom Visualforce', 'Update a Record', 'Lightning Component', and 'Flow'. The 'Target Object' is set to 'Account'. The 'Standard Label Type' is set to 'Label'. The 'Name' field is empty. The 'Description' field is empty. The 'Create Feed Item' checkbox is checked. The 'Success Message' field is empty. The 'Icon' field shows a lightning bolt icon and the text 'Change Icon'. The interface includes 'Save' and 'Cancel' buttons at the top right and bottom right.

Field	Value
Object Name	Account
Action Type	Create a Record
Target Object	Account
Standard Label Type	Label
Label	
Name	
Description	
Create Feed Item	<input checked="" type="checkbox"/>
Success Message	
Icon	⚡ Change Icon

There are two types of actions in Salesforce Lightning. Object-Specific and Global. First, you must decide which type action need to determine is whether it should be global or Object-Specific. Let's see what is different between Object specific and Global.

Object-Specific Actions

You can create an Object-Specific actions in object only and add an Object-Specific action only to page layout for that object. There are five types of Object-Specific actions.

1- Create a Record

Object-specific action create a record that is automatically associated with related records. For example, you add an object-specific action on the Account object that creates contacts. If a user creates a contact with that action on the detail page for the Miraforce account, that new contact is associated with Miraforce.

2- Update a Record

Object-specific Update a Record action makes it easy for users to edit records. You can define the fields that are available for update.

3- Log a Call

Object-specific Log a Call actions lets users enter calls, meetings, notes, or other interactions that are related to a specific record.

4- Lightning components, flows and Visualforce pages

Object-specific custom actions invoke Lightning components, flows and Visualforce pages that let users interact with or create records that have a relationship to an object record. The Visualforce page for an object-specific custom action must include the standard controller for the relevant object.

5- Send Email

Object-specific Send Email actions, available only on cases, give users access to a simplified version of the Case Feed Email action in the Salesforce mobile app.

Create an Object-Specific Action in Lightning

Note : Supported Objects

When you create an object-specific action, you can choose as a target object an event, a task, or any object that has a parent-child or lookup relationship to the host object. You can't choose

Quote as a target object from Opportunity. However, you can still create quotes from an opportunity by going to the opportunity's Quotes related list and clicking New.

You can create object-specific actions on many objects, including:

- *Account*
- *Campaign*
- *Case*
- *Contact*
- *ContentNote*
- *Custom objects*
- *Group*
- *Lead*
- *Opportunity*

Global Actions

You can create a global action in different places in set up than you create an object-specific actions. Global create actions enable users to create object records, but the new record has no direct relationship with other records. For example, when you create a Log a call In Lightning Experience, Log a Call actions on global layouts display in the Global Actions menu.

Create a Global Action in Lightning

Note : Supported Objects for Create Actions

You can create global actions to let users create many kinds of records, including:

- *Account*
- *Asset*
- *Badge*
- *Campaign*
- *Case*
- *Contact*
- *Contract*
- *Custom objects*

- *Event (without invitees)*
- *Goal*
- *Group*
- *Knowledge object*
- *Lead*
- *Note*
- *Opportunity*
- *Orders*
- *Person Account*
- *Question*
- *Reward*
- *Task*
- *Work Order*