

# How to use Mass Quick Action in Salesforce?

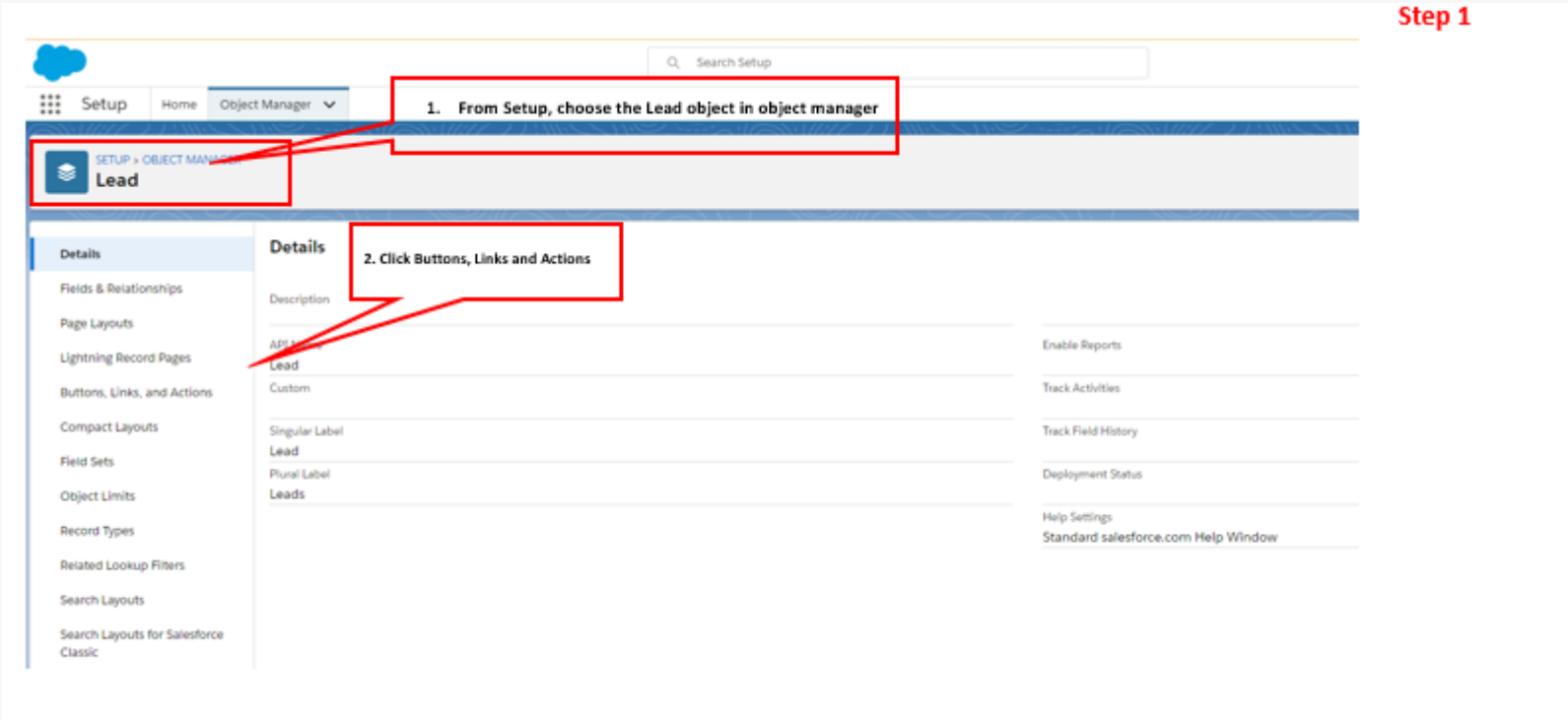
A **mass quick action** is a **quick action** that gets added to an object’s search layout. After a **mass quick action** is set up, you can select up to 100 records in a list view and perform **mass** updates.

There are a few considerations though before setting up and using mass quick actions.

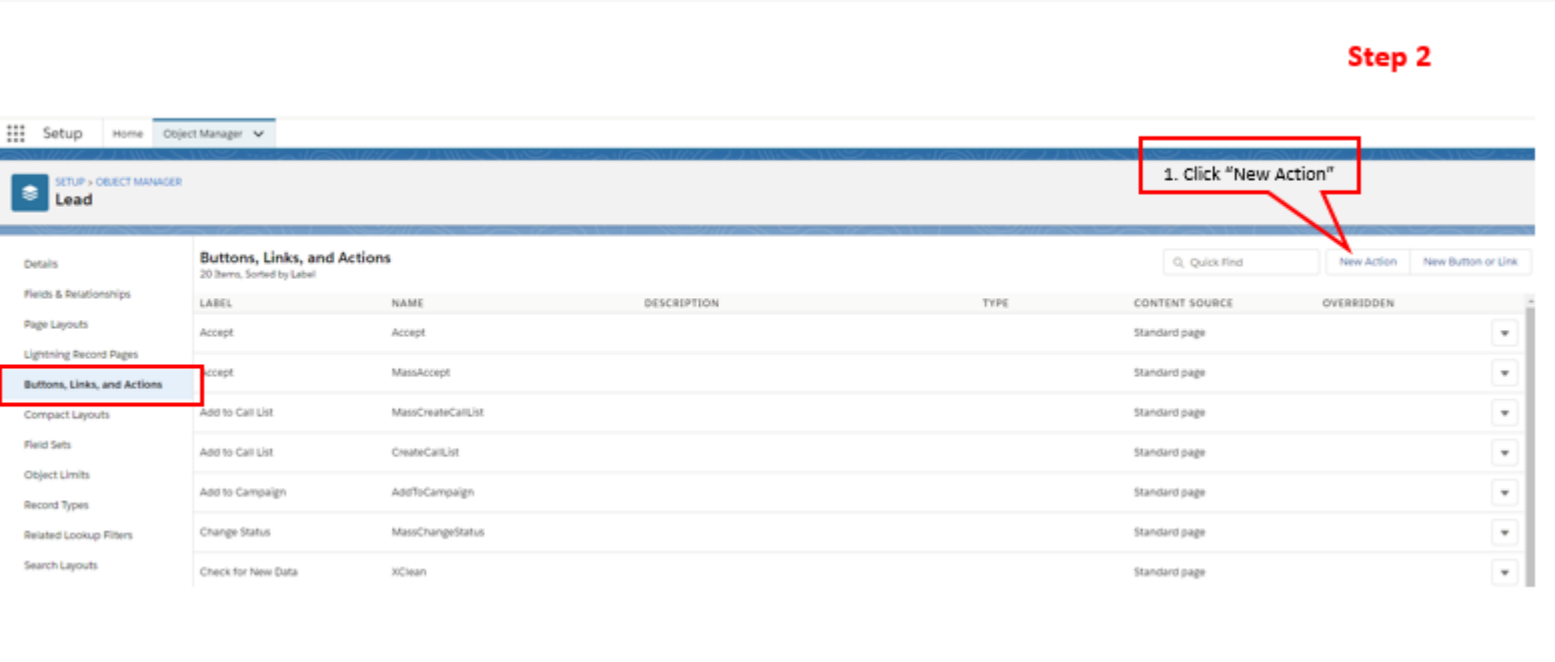
- Mass quick actions are available only in Lightning Experience apps, including apps with standard and console navigation.
- Cannot perform mass quick actions in Communities, or on notes or users.
- Cannot use the Tooling API, AppExchange, and Changesets to add mass quick actions to an object's search layout.
- Cannot perform mass quick quick actions on Recently viewed lists.
- If you want to set up predefined field values for a quick action, we recommend not including those fields on the quick action’s layout.If a predefined field value is included in the quick action’s layout, the predefined value is only updated if the user manually selects the predefined value. If a predefined field value isn’t included in the quick action’s layout, the predefined value is updated, but the user might not be aware of the change. The “Fields to update” section doesn’t include predefined field values not specified in the layout.

Below you will see steps on how to create a Quick Action for an object called “Leads” while enabling the users to create multiple Tasks on several Lead records. These Tasks will then show in a Customized Task Calendar which I also created.

## Step 1:



## Step 2:



## Step 3:

Step 3

Setup Home Object Manager

SETUP > OBJECT MANAGER

Lead

Details

Fields & Relationships

Page Layouts

Lightning

Buttons

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for Salesforce Classic

Lead Actions

New Action

Enter Action Information

Object Name: Lead

Action Type: Create a Record

Target Object: Task

Standard Label Type: New [Record]

Name: New\_Task

Description: Multiple Lead records from a List View

Create Feed Item: ☒

Success Message:

Icon: Choose Icon

Save Cancel

1. Select 'Action Type'

2. Select 'Target Object'

3. Select 'Standard Label Type'

4. Specify 'Name'

5. Enter short 'Description'

6. Click 'Save'

Step 4:

Action: New Task

Save Quick Save Preview As... Cancel Undo Redo

Task Fields

Quick Find Field Name

Blank Space Create Recurring... Recurrence Interval Status

Assigned To Due Date Related To Subject

Call Result Name Reminder Set Task Subtype

Comments Priority Repeat This Task Type

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

2. Add 'Type' field onto page layout

Subject Sample Text

Due Date 16/06/2020, 16:03

Name Sample Text

Status Sample Text

Priority Sample Text

Assigned To Sample Text

Related To Sample Text

Blank Space

Salesforce recommends having maximum 8 fields on the layout as it could affect user efficiency.

Step 5:

Lead Actions

New Task

Predefined Field Values

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

Create Feed Item: ☒

Message:

Created By: Admin User 16/06/2020, 14:26

Created Date: 16/06/2020, 14:26

Created By: Admin User 16/06/2020, 14:26

Predefined Field Values

Action	Field Name	API Name	Field Type
Edit   Del	Due Date	ActualDate	Date/Time
Edit   Del	Priority	Priority	Picklist
Edit   Del	Status	Status	Picklist
Edit   Del	Subject	Subject	Picklist
Edit   Del	Type	Type	Picklist

1. I am predefining Task Subject for all Tasks which will be created

2. Date Calculation which is set Due Date from created Date

Predefined Field values. These fields will be added to the list view in search layout

Value: (Today)+2

Normal

"Cold Call"

Call