Action Plans

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CONTENTS

Action Plans

An action plan defines the tasks and other items needed to complete a business process. Each task has a priority, a number of days in which it must be completed, and a person who is responsible. Action plans are created from action plan templates, which allow you to capture repeatable tasks. Users see the tasks assigned to them through task lists and views. Users record task status information using the standard interfaces for tasks or the Action Plan details view. Target records, such as accounts or contacts, also show lists of related action plans.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

Here are a couple of examples of how different clouds can implement action plans:

- In Financial Services Cloud, create an action plan template for financial plan review meetings with clients. For such engagements, wealth managers need to set up a meeting in advance, collect financial documentation, and review the documentation. You set up this action plan template once, and update it as your understanding of the repeatable tasks refines over time. Then, when wealth managers need review meeting with clients, you can create an action plan based on the template. You don't have to worry about all the appropriate tasks getting created because those tasks are defined in the template.
- In Public Sector Solutions, create an action plan template for vetting procedures that are required before rolling out an offer to a recruitment candidate. In vetting procedures, recruiters or HR specialists need to scrutinize personal information, such as conduct background checks, medical examinations, and review findings. Set up an action plan template for a procedure. Then, as new candidates require vetting, create an action plan based on the template, ensuring that all necessary tasks such as information collection and background checks are systematically addressed.

Note Looking for sales action plans? See Sales Action Plans.

Action Plans Editions
Review the supported products and editions for Action Plans.

Action Plans Data Model
You can create an action plan template and its generated action plans for various objects, depending on the products and licenses available in your org. You can also create them for custom objects that

have Activities enabled.

Which Features Work with Action Plans?

Your users interact with action plans using standard features.

Action Plan Lightning Components

Put action plans in front of your users by including Lightning components in the user console.

Set Up Action Plans

To enable Action Plans, add Action Plan Templates to the navigation bar of relevant apps and update affected Lightning pages to include action plans.

Work with Action Plans and Templates

Discover the information you need when working with action plans effectively and efficiently.

Update API Implementations of Action Plans

In Summer ’19, Action Plans expanded object support to more standard and custom objects. If your API implementation of Action Plans references `TargetId` and assumes it’s an account record, you must update your code.

Copy and Distribute Action Plan Templates

Create an action plan template based on an existing one by cloning it. Share action plan templates between organizations by packaging them.

Set Up Action Plans in Experience Cloud Sites

Create and assign a community user profile and a permission set that give Experience Cloud site users access to action plans. Then, add action plans to your site's home page and record detail pages.

Action Plans Editions

Review the supported products and editions for Action Plans.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with Automotive Cloud
Available in: **Professional**, **Enterprise**, and **Unlimited** Editions with Consumer Goods Cloud
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Education Cloud
Available in: **Enterprise** and **Unlimited** Editions with Financial Services Cloud
Available in: **Enterprise** and **Unlimited** Editions with Government Cloud and Lightning Scheduler
Available in: **Enterprise** and **Unlimited** Editions with Health Cloud
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with Manufacturing Cloud
Available in: **Enterprise**, **Unlimited**, and **Developer** Editions with Nonprofit Cloud
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions with Public Sector Solutions

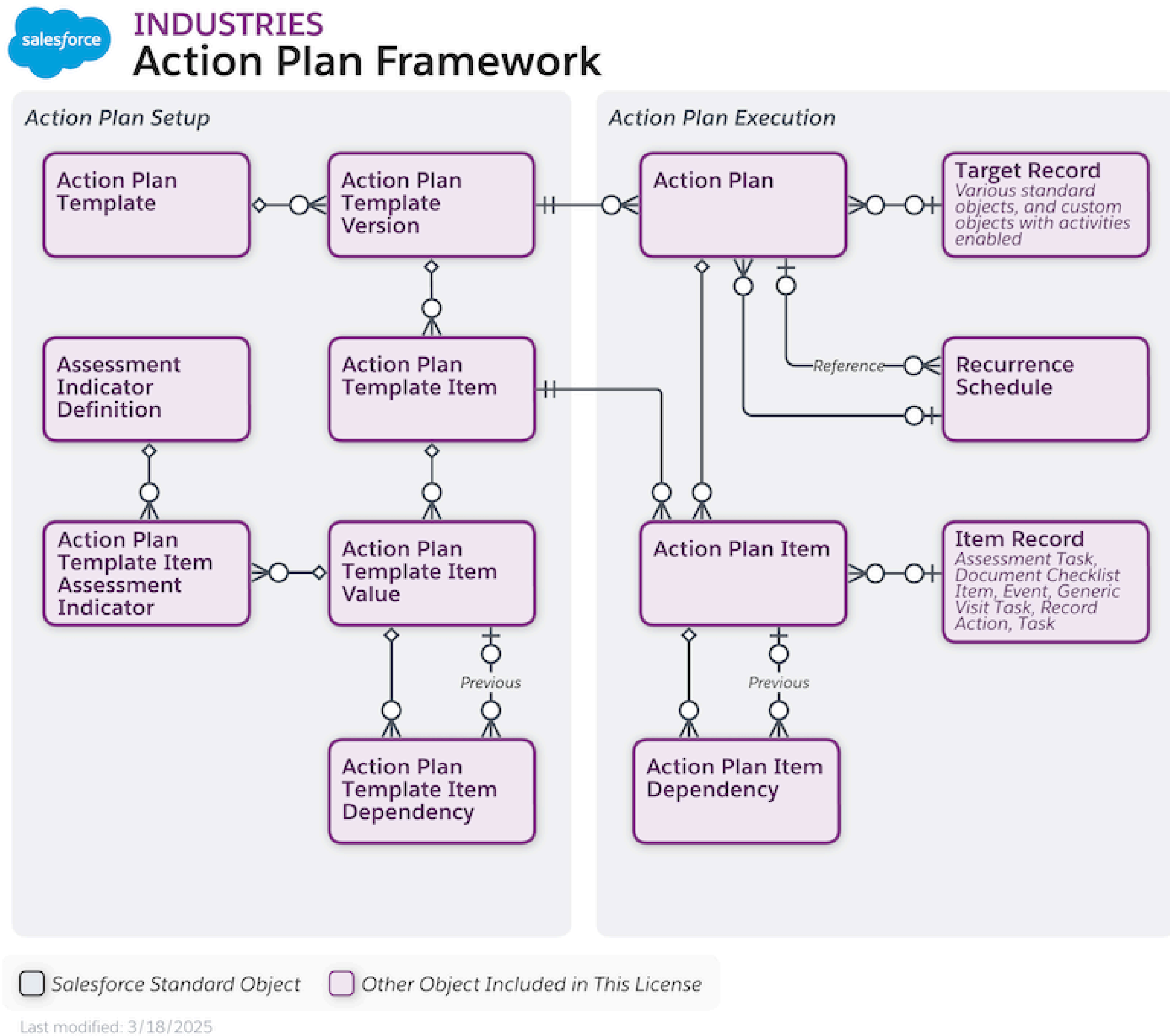
Action Plans Data Model

You can create an action plan template and its generated action plans for various objects, depending on the products and licenses available in your org. You can also create them for custom objects that have Activities enabled.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

Here's the Action Plans data model.



The types of items that can be included in an action plan template and its generated action plans include:

- Document Checklist Item (available when Financial Account is the target object)
- Task

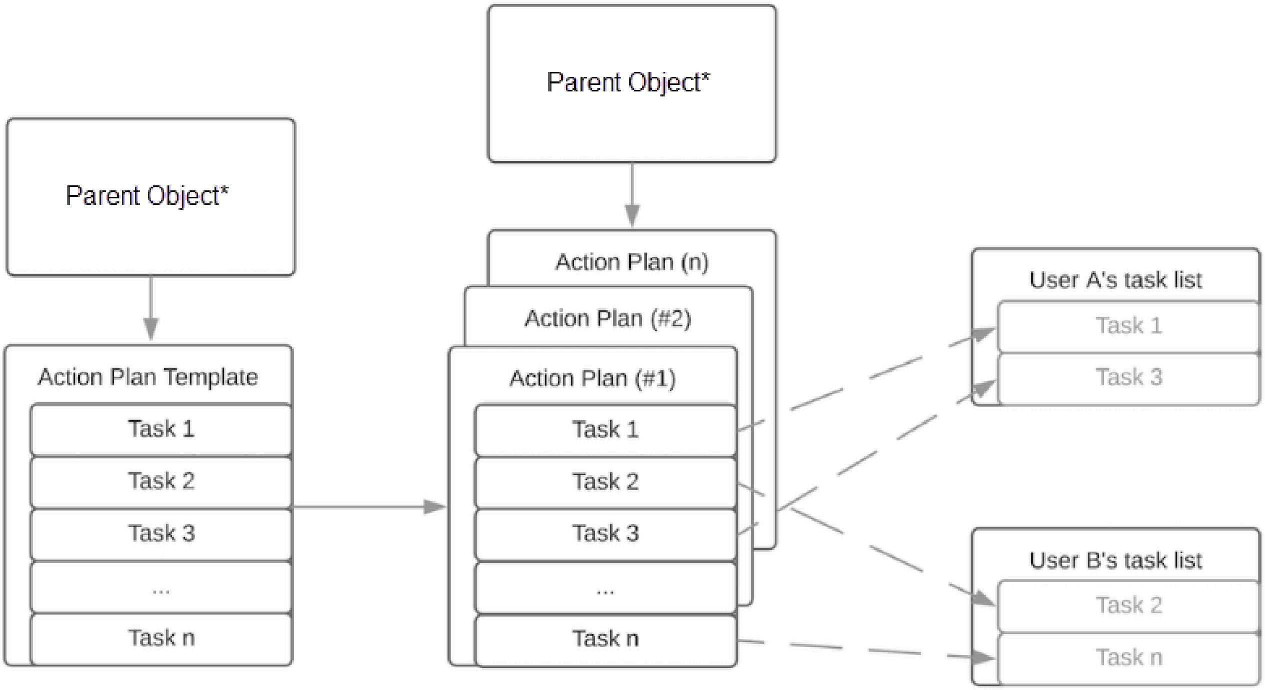
Note Some Salesforce products support additional action plan item types.

Target objects are:

- Account (applicable to both Person Accounts and Business Accounts)
- Asset Account Participant
- Asset Contact Participant
- Asset Milestone
- Assets and Liabilities
- Benefit

- Benefit Assignment
- Business License Application
- Business Milestone
- Campaign
- Card
- Care Plan
- Case
- Claim
- Contact
- Contract
- Emergency Request
- Financial Account
- Financial Deal
- Financial Goal
- Financial Holding
- Fleet
- Goal Assignment
- Individual Application
- Insurance Policy
- Insurance Policy Coverage
- Lead
- Opportunity
- Person Life Event
- Preliminary Application Reference
- Program
- Public Complaint
- Record Alert
- Regulatory Code Violation
- Residential Loan Application
- Violation Enforcement Action
- Vehicle
- Vlocity Scheduled Job
- Custom objects that have activities enabled

In an action plan template, assign each task or other item to a person, a role, a queue, or the action plan creator. When creating templates with the UI, the plan creator becomes the plan owner. When creating templates using the API, you can designate a plan owner different from the plan creator.



Which Features Work with Action Plans?

Your users interact with action plans using standard features.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

The following standard Salesforce features are supported.

- Object-level security: Apply Create-Read-Update-Delete (CRUD) access and Field-level security (FLS) rules to action plan templates and action plans.
- Reports and dashboards: Get insights into the status of an action plan.
- Workflow rules, processes, and triggers: Automate creating and updating action plans and related records when data changes or users perform a task.
- Custom fields: Add the information that is important to you to an action plan.

Action Plan Lightning Components

Put action plans in front of your users by including Lightning components in the user console.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

These Lightning components are available:

Action Plans List
Provides the list of action plans related to a record and how each action plan is progressing. The component includes a button to add an action plan. You can add this component to pages for account, campaign, case, contact, contract, lead, and opportunity records. You can also add this component to pages for records for custom objects that have activities enabled.

Action Plans Highlights
Shows the status, created date, and assigned user for an action plan template. The component includes buttons to add a task and publish and deactivate the template. You can add this component to the Action Plan Template page.

Action Plans Template Tasks List
Shows the list of tasks belonging to an action plan template. You can add this component to the Action Plan Template page.

Set Up Action Plans

To enable Action Plans, add Action Plan Templates to the navigation bar of relevant apps and update affected Lightning pages to include action plans.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

Note The Action Plan Template object isn’t customizable. In other words, you can’t create or modify its fields, buttons, links, actions, and so on.

Override the Labs Unmanaged Package for Action Plans
If you have the AppExchange Salesforce Labs unmanaged package with action plan custom objects installed, disable it to use Action Plans.

Assign Permission Set Licenses and Permission Sets for Action Plans
Give your users access to action plans.

Enable Additional Permissions for Action Plans
Help users manage action plan details by giving them the appropriate level of permissions for the required objects.

Require a Status for Action Plans
To accurately track and report on action plans based on their status, set the Status field on the Action Plan object page layout to Required.

Activate a Flow to Automate the Status Update for Action Plan
Increase operational efficiency by syncing the action plan status with the status of the task action plan items. Clone and activate a flow template to automate the status of the action plan according to the status of the task action plan items.

Add an Action Plan Templates Tab
To give users convenient access to create action plan templates, add a tab to the navigation bar.

Enable Comments for Tasks in Action Plan Templates
You can now make comments mandatory for tasks within action plan templates to better drive execution by ensuring that every task provides essential context for the user who performs the work.

Add Action Plans to the Related List
To create action plans, the Action Plans list must be available on the supported object page layouts.

Add Action Plans to Record Pages
To use action plans on supported records, add the Action Plans List Lightning component to Lightning record pages and any pages that you've customized or created.

Add Actions to the Action Plan Template Record Page
Add or remove quick actions available in the highlights panel on an action plan template record page. Show or hide actions based on the user profile or the console app.

Set Action Plan Status Values
Review the action plan default status value, life-cycle status values, and setup values that suit your organization.

Set Up Nonwork Days for Action Plans
To use the option to skip nonwork days when setting task completion dates, add details to the default business hours record and for company-wide holidays.

Customize the Display Columns for Tasks in Action Plans and Action Plan Templates
Add or remove columns from the Action Plan task list view in action plans and action plan templates.

Override the Labs Unmanaged Package for Action Plans

If you have the AppExchange Salesforce Labs unmanaged package with action plan custom objects installed, disable it to use Action Plans.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

1. Rename the action plan tabs installed by the Labs unmanaged package.
2. Hide the renamed action plan tabs.
3. Configure a custom permission set, or edit user profiles to expose the action plan tabs.

See Also

Assign Permission Set Licenses and Permission Sets for Action Plans
Salesforce Help: Add, Remove, and Organize Your Tabs in Salesforce Classic
Salesforce Help: View and Edit Tab Settings in Permission Sets and Profiles

Assign Permission Set Licenses and Permission Sets for Action Plans

Give your users access to action plans.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

To assign the Action Plans permission set to a user, grant them an appropriate Salesforce license first. For more information about the license, contact your Salesforce account executive.

To use document checklist items, set up Document Tracking and Approvals.

1. From Setup, in the Quick Find box, enter `Users`, and then select **Users**.
2. Click a user’s name.
3. Under Permission Set Assignments, click **Edit Assignments** and add the Action Plans permission set.
4. Save your changes.

See Also

Tip Sheet: Manage Bulk Permission Set License (PSL) Assignments for Financial Services Cloud

Enable Additional Permissions for Action Plans

Help users manage action plan details by giving them the appropriate level of permissions for the required objects.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

Note Salesforce offers two ways to work with profiles: the enhanced profile user interface and the original profile user interface. You can switch between the two in Setup. Search for and select **User Management Settings**, and then turn on or turn off Enhanced Profile User Interface. These instructions are for the enhanced profile user interface.

1. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.
2. Select a profile and then click **Edit**.
   For example, in Financial Services Cloud, select Advisor or Personal Banker profile.
3. Under General User Permissions, enable **Access Activities**.
4. Under Standard Object Permissions, assign the appropriate level of Create-Read-Update-Delete (CRUD) access to these objects.
   - Action Plans
   - Action Plan Templates
   - Document Checklist Items, if you've set up Document Tracking and Approvals
   - Recurrence Schedule
5. Save your changes.

Require a Status for Action Plans

To accurately track and report on action plans based on their status, set the Status field on the Action Plan object page layout to Required.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

1. From Setup, open Object Manager and click **Action Plan**.
2. Open Page Layouts and click **Action Plan Layout**.

3. Click the wrench icon next to Action Plan Status, select Required, and save your changes.

Activate a Flow to Automate the Status Update for Action Plan

Increase operational efficiency by syncing the action plan status with the status of the task action plan items. Clone and activate a flow template to automate the status of the action plan according to the status of the task action plan items.

REQUIRED EDITIONS

Available in: Lightning Experience
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Note You can customize the flow according to your business requirements.

1. From Setup, in the Quick Find box, enter Flows, and then select **Flows**.
2. Click **Update Action Plan Status**.
3. To make a copy of this flow template, click **Save As New Flow**.
4. Provide a name for the flow and API and click **Save**.
5. Click **Activate**.

Add an Action Plan Templates Tab

To give users convenient access to create action plan templates, add a tab to the navigation bar.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

You can add an Action Plan Templates navigation bar tab to Classic and Lightning apps.

Note You can't add navigation bar tabs to Community or Connected apps.

1. From Setup, enter `App Manager` in the Quick Find box, then select **App Manager**.
2. For each app you want to add the tab to, select **Edit** from the dropdown list.
3. For Classic apps only, add a tab this way:
   a. Under Available Tabs, select **Action Plan Templates**, and click **Add**.
   b. In the Selected Tabs list, select **Action Plan Templates** and use the buttons on the right to adjust its

position on the navigation bar.

4. For Lightning apps only, add a tab this way:
   a. Under App Settings, click **Navigation Items**.
   b. In the Available Items list, select **Action Plan Templates** and add it to Selected Items.
   c. In the Selected Items list, select **Action Plan Templates** and use the buttons on the right to adjust its position in the navigation bar.
5. Save your changes.

Enable Comments for Tasks in Action Plan Templates

You can now make comments mandatory for tasks within action plan templates to better drive execution by ensuring that every task provides essential context for the user who performs the work.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To configure Action Plans:	Action Plans permission set OR Modify All Data

1. From Setup, enter `Action Plan` in the Quick Find box, then select **Action Plan Settings**.
2. Select **Require Comments for Action Plan Tasks**.

Add Action Plans to the Related List

To create action plans, the Action Plans list must be available on the supported object page layouts.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

You can create action plans templates for Account, Campaign, Case, Contact, Financial Account, Contract, Lead, or Opportunity objects. You can also create action plans templates for custom objects with activities enabled.

1. From Setup, open **Object Manager**.
2. Click the supported object you want and select **Page Layouts**.
3. For each page layout you want to add the Action Plans list to:
   a. In the palette, select **Related Lists**.
   b. Drag **Action Plans** to the Related Lists section of the page layout.
4. Save your changes.

Add Action Plans to Record Pages

To use action plans on supported records, add the Action Plans List Lightning component to Lightning record pages and any pages that you've customized or created.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

Action Plans support Account, Campaign, Case, Contact, Contract, Financial Account, Lead, or Opportunity objects. You can also create action plan templates for custom objects with activities enabled.

Modify Lightning record pages based on any object that Action Plans supports. For example, in these pages in Financial Services Cloud:

- Client Record Page
- Banking Business Account Page
- Banking Business Contact Page
- Banking Household Page - One Column
- Banking Household Page - Two Column
- Banking Individual Page - One Column
- Banking Individual Page - Two Column

1. Clone the Lightning pages you want to modify, and find any clones of those pages.
2. For each page:
   a. Add a custom tab for the Action Plans List and name it Action Plans.
   b. In the component palette, select **Action Plan List** and drag it to where you want it on the page.
   c. Save the page.
3. Replace the default pages with your cloned and updated pages.

See Also

Salesforce Help: Lightning Pages

Add Actions to the Action Plan Template Record Page

Add or remove quick actions available in the highlights panel on an action plan template record page. Show or hide actions based on the user profile or the console app.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

1. Open the action plan template record that you want to add quick actions for.
2. From the Setup menu on a record page, click **Edit Page**.
3. **Note** You can’t use the default Highlights Panel component to configure dynamic actions.

   Drag the new **Highlights Panel** component onto the canvas. The component properties appear in the properties pane.
4. Configure dynamic actions for the new Highlights Panel component.
   a. Click **Upgrade Now**.
   b. Select **Start from Scratch** on the Dynamic Actions window and click **Next**.
   c. Click **Finish**.
5. Click **Add Action** and select the quick actions you want to show on the Highlights Panel.
   You can also set the visibility for a specific action based on the user profile or the console app.

Set Action Plan Status Values

Review the action plan default status value, life-cycle status values, and setup values that suit your organization.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

1. From Setup, select **Object Manager**.
2. Select **Action Plan**, and open **Fields & Relationships**.
3. Open **Status**.
4. In Status Picklist Values, remove the values that you don’t need, add your action plan status values,

and select the default value.

Set Up Nonwork Days for Action Plans

To use the option to skip nonwork days when setting task completion dates, add details to the default business hours record and for company-wide holidays.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

1. Set up working days.
   a. From Setup, enter *`Business Hours`* in the Quick Find box, then select **Business Hours**.
   b. Next to the default record, click **Edit**.
   c. Set your time zone.
   d. Set your business hours for each working day. To indicate a nonworking day, leave the day's start and end time fields blank.
      Action Plans considers any day with any amount of working time to be one complete working day for the skip nonwork days calculation.
   e. Save your changes.
2. Set up company-wide holidays.
   a. From Setup, enter *`Holidays`* in the Quick Find box, then select **Holidays**.
   b. Click **New**.
   c. Add the holiday details.
      Do not select Recurring Holiday. Action Plans does not consider recurring holidays when determining the nonwork days to skip when calculating task completion dates.
   d. Save your changes.
   e. Repeat for each holiday you want to add.

See Also

Salesforce Help: Set Business Hours

Customize the Display Columns for Tasks in Action Plans and Action Plan Templates

Add or remove columns from the Action Plan task list view in action plans and action plan templates.

REQUIRED EDITIONS

Available in: Lightning Experience

Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To configure action plans:	Action Plans permission set OR FSC Sales OR FSC Services OR Modify All Data

Note For the additional task fields, the data types supported for column customization are text, boolean, and picklist (single select). All data types are supported for the default fields.

1. Open the action plan or action plan template that you want to customize the display of columns for.
2. From Setup, click **Edit Page**.
3. Select the tasks component.
4. In the Properties pane, under Tasks Fields Columns, click **Select**.
5. From the Available list, move the columns from the Available to the Selected list and sort their order as needed.

   

   

   Note You can select both the default fields and the additional fields and You can select up to 8 fields to be shown on the tasks list view.
6. Click**OK**.

Work with Action Plans and Templates

Discover the information you need when working with action plans effectively and efficiently.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

Create Action Plan Templates
Provide templates for users to create their own action plans. An action plan template defines the tasks and document checklist items needed to complete a business process.

Create Individual, Specific Action Plans from Templates
Action Plans allow you to capture repeatable tasks and then automate the task sequences improving collaboration and productivity. Using action plans, a team can automatically assign task owners and deadlines for specific client engagements. Action plans also make it easy to create reports and dashboards, so you can monitor progress and ensure compliance.

Show Action Plan Items in the Printable View
If you want the printable view to show tasks, document checklist items, and files, edit the Action Plan page layout. Then add the Tasks and Document Checklist Items related lists to the page layout.

Customize the Display Order of Tasks and Document Checklist Items
Use the reorder capability to rearrange tasks and document checklist items in an action plan or action plan template.

Attach Files to Action Plans
Attach files to an action plan to reduce the overhead of attaching the same file or business collateral multiple times to various tasks of the same action plan.

Schedule Recurring Action Plans
With a recurring schedule, you can create recurring action plans for repeatable business processes. Before creating a recurring schedule for action plans, identify the tasks that you must perform.

Create Action Plan Templates

Provide templates for users to create their own action plans. An action plan template defines the tasks and document checklist items needed to complete a business process.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To configure Action Plans:	Action Plans permission set OR Modify All Data

Need a refresher on the difference between an action plan template and an action plan?

- An action plan template captures the repeatable tasks involved in a specific type of engagement. You set up the action plan template once, and update it as your understanding of the repeatable tasks refines over time.
- An action plan is a run-time instance of the template that allows you to automate the sequence of the tasks you defined in the template. You generate an action plan from the template for each engagement. You can create multiple action plans from an action plan template.

To create a template:

1. From the App Launcher, find and select **Action Plan Templates**, and then click **New**.
2. Create an action plan template.
   a. Enter a name and a description for the action plan template.
   b. Select the template owner.
   c. Select a Target Object.
   d. Select the Action Plan Type as **Industries**.
   e. Save your changes.
3. In the Items tab:
   - To create a task, click **New Task**.
   - To create a document checklist item, click **New Document Checklist Item**.

   Note You can create multiple tasks and document checklist items.
4. Click **Publish Template**.

   Add Tasks to Action Plan Templates
   Add tasks that are commonly done together in a single action plan template.

   Add Task Dependencies to Action Plans
   Ensure that all tasks in an action plan are current and actionable by defining the prerequisite tasks that must be done prior to the successor tasks.

   Assign Action Plan Tasks to Roles
   Set up account, case, or opportunity teams to let users assign an action plan task to a role rather than a specific person.

   Assign Action Plan Tasks to Queues
   Set up queues to let action plan template creators assign tasks to queues. When an action plan is generated from the template, any user that’s a member of the queue can take ownership of the assigned task.

Considerations for Creating Action Plan Templates
Before you create action plan templates, review these considerations.

Include More Fields in Action Plan Template Tasks
When creating tasks for action plan templates, you can capture more data for the tasks by including up to eight additional standard and custom fields in addition to the default fields, such as subject, priority, days, and comments.

Filter Action Plan Templates by Status
In the action plan templates list view, use the filter options to filter by status.

Add Tasks to Action Plan Templates

Add tasks that are commonly done together in a single action plan template.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To configure Action Plans:	Action Plans permission set OR Modify All Data

1. From the App Launcher, find and open **Action Plan Templates**.
2. Select the required template and click **New Task**.
3. Enter the task details for Subject, Priority, and Days.
4. Select **Required** if you want to make the task mandatory to perform.
5. Assign the task to a specific user and role.
6. Select a time when you want to send a reminder to the task assignee on the due date.
7. Save your changes.

Add Task Dependencies to Action Plans

Ensure that all tasks in an action plan are current and actionable by defining the prerequisite tasks that must be done prior to the successor tasks.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

Create dependencies when adding a task to an action plan template. Select one or more prerequisite tasks from the Available Tasks list to create finish-to-start dependencies from those prerequisite tasks to the task being created.

When an action plan is initially generated from the template, it creates only the tasks that have no dependencies. As prerequisite tasks get completed, their successor tasks are added to the plan.

A task can be dependent on up to three prerequisite tasks. A successor task is added to the action plan task list only after all its prerequisite tasks are completed.

A task can have up to 10 successor tasks. An action plan template can support a maximum of 24 task dependencies in a sequence. Be mindful of the task dependencies that you're adding to an action plan template because that impacts the action plan creation time.

The Tasks list on the Action Plan Template page shows the prerequisites for each task. The Days to Complete value indicates the number of days to complete the task, and doesn't include the days to complete the prerequisites.

Assign Action Plan Tasks to Roles

Set up account, case, or opportunity teams to let users assign an action plan task to a role rather than a specific person.

REQUIRED EDITIONS

Available in: Lightning Experience
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Assign Action Plan Tasks to Account Team Roles
Set up account teams to enable the option to assign an action plan task to a role.

Assign Action Plan Tasks to Opportunity Team Roles

Set up opportunity teams to enable the option to assign an action plan task to a role.

Assign Action Plan Tasks to Case Team Roles

Set up case teams to enable the option to assign an action plan task to a role.

Assign Action Plan Tasks to Account Team Roles

Set up account teams to enable the option to assign an action plan task to a role.

REQUIRED EDITIONS

Available in: Lightning Experience
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Account teams are groups of users who work together on a client. You define the account team roles within your organization. Account owners then assign the people who play those roles for a client.

The creator of an action plan template can specify which role is assigned a task. The role is resolved to a user when an action plan is created.

1. From Setup, enter `Account Teams` in the Quick Find box, then select **Account Teams**.
2. Click **Enable Account Teams**, then select **Account Teams Enabled** and save the setting.
3. Select the page layouts in which to include the account teams list component, such as the client and business account pages.
4. Save your changes.
5. Click **Team Roles** and update the list of roles so they match your business requirements.
   For example, you might include banker, relationship manager, advisor, or claims agent.
6. Add account team members in bulk:
   a. From Setup, enter `Mass Reassign Account Teams` in the Quick Find box, then select **Mass Reassign Account Teams**.
   b. Complete the steps to select client profiles and define account team members.
   c. Repeat to assign other account team members to client profiles.
   d. Save your changes.

Note While not used within Action Plans, account teams enable extra access to Account, Opportunity, Case, and related objects to be granted. To use this feature, setup is required.

See Also

Salesforce Help: Account Teams

Assign Action Plan Tasks to Opportunity Team Roles

Set up opportunity teams to enable the option to assign an action plan task to a role.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

Opportunity teams are groups of users who work together on an opportunity. You define the opportunity team roles within your organization. Opportunity owners then assign the people who play those roles for an opportunity.

The creator of an action plan template can specify which role is assigned a task. The role is resolved to a user when an action plan is created.

1. From Setup, enter `Opportunity Team Settings` in the Quick Find box, then select **Opportunity Team Settings**.
2. Select **Enable Team Selling** and save the setting.
3. Select the page layouts in which to include the opportunity teams list component.
   For example, you might select the Opportunity (general) and Opportunity (wallet share) pages.
4. Save your changes.
5. From Setup, enter `Team Roles` in the Quick Find box, then select **Team Roles**.
6. Update the list of team roles so they match your business requirements, for example banker, relationship manager, advisor, or claims agent.
7. Add opportunity team members in bulk:
   a. From Setup, enter `Mass Reassign Opportunity Teams` in the Quick Find box, then select **Mass Reassign Opportunity Teams**.
   b. Complete the steps to select opportunities and define opportunity team members.
   c. Repeat to assign other opportunity team members to opportunities.
   d. Save your changes.

Note While not used within Action Plans, opportunity teams enable extra access to Opportunity and related objects to be granted. To use this feature, setup is required.

See Also

Salesforce Help: Opportunity Teams

Assign Action Plan Tasks to Case Team Roles

Set up case teams to enable the option to assign an action plan task to a role.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud,

Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

Case teams are teams of users who work together on a case. You define case team roles within your organization. Case team roles and predefined case teams are assigned cases based on assignment rules.

The creator of an action plan template can specify which role is assigned a task. The role is resolved to a user when an action plan is created.

Note Role resolution only supports a single team assigned to a case. Role resolution for case team members doesn't work when there are multiple case teams involved.

1. From Setup, enter `Case Team Roles` in the Quick Find box, then select **Case Team Roles**.
2. Create a list of case team roles that match your business requirements.
   For example, in Financial Services Cloud, you might include banker, account specialist, relationship manager, advisor, or agent.
3. From Setup, enter `Predefined Case Teams` in the Quick Find box, then select **Predefined Case Teams**.
4. Update the list of predefined case teams to meet your business needs.
   To work with Action Plan role resolution, team members must be users. Team members that are contacts don't work with Action Plans.
5. Assign teams to cases using **Case Assignment Rules**,

Note While not used within Action Plans, case teams enable extra access to Case and related objects to be granted. To use this feature, setup is required.

See Also

Salesforce Help: Set Up Case Teams

Assign Action Plan Tasks to Queues

Set up queues to let action plan template creators assign tasks to queues. When an action plan is generated from the template, any user that's a member of the queue can take ownership of the assigned task.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

A queue lets a team of users share their workload. Tasks appear in a queue list, and any member of the team can take ownership of a task in the list.

You define the queues within your organization and add specific users or roles as queue members. Action plan template creators then assign tasks to the queue. When a new action plan is generated, a newly created task is added to the queue, ready for pick-up by a queue member.

1. From Setup, enter `Queues` in the **Quick Find** box, then select **Queues**.
2. Click **New** and enter a label and queue name. The label is the name of the list view that users work from.
3. Choose an email address to notify when new records are added to the queue. (optional)
4. If your org uses divisions, select the queue's default division.
5. Add the objects to include in the queue. Select objects that can be included in action plan templates, such as Task, Assessment Task, or Document Checklist Item.
6. Add queue members and save the queue.
   Members can be individual users, roles, public groups, or partner users.

When adding a task to an action plan template, select **Queue** under Task Assignment, and then choose a queue from the list.

See Also

Salesforce Help: Create Queues

Considerations for Creating Action Plan Templates

Before you create action plan templates, review these considerations.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

- Create action plan templates for accounts, contacts, leads, or other supported objects, or for custom objects that have activities enabled. You can create action plans for any account record type, such as a person, individual, household, business, institution, and custom record types.
- By default, action plans generated from a template can only contain the same list of items specified in the template. To let users add tasks or other items to a generated action plan, enable **Let users add items to plans** when creating the action plan template.
- You can add a maximum of 100 tasks or other items to an action plan template.
- In the UI, an action plan template has a status lifecycle. You can update an action plan template with a Draft status to Published or Obsolete. You create action plans from a Published template. After you publish a template, you can't change it, and you can't return it to Draft status. You can deactivate a Published action plan template to make it Obsolete. You also can't revert a deactivated template to Draft or Published status.

  
- You can specify the number of days (date offset) available to complete a task beginning from the start

date of an action plan. The maximum value you can set is 1,000 days. If you select **Skip Nonwork Days**, nonwork days are added to this count.

- Priority is used to set the priority of the task created from the template.
- You can set a task so it's assigned to:
  - a specific person.
  - the person creating the action plan, the plan owner.
  - a queue.
  - a role from the Account team

    Note This option is only displayed when the account teams option is enabled.

  - a role from the Opportunity team

    Note This option is only displayed when the opportunity teams option is enabled.

  - a role from the Case team

    Note This option is only displayed when case team roles have been implemented. Role resolution only supports a single team assigned to a case. Role resolution for case team members doesn't work when there are multiple case teams involved.

- You can add document checklist items to an action plan template. Document checklist items can't be assigned to people or given a deadline, but they can be marked as required. You must add Document Types before you can reference them as document checklist items in an action plan template.
- You can create action plan templates for a new object only after the object is cached. So, if a new object isn't listed in the **Target Object** dropdown of the New Action Plan Template dialog box, try again later.
- Manual sharing of action plan templates is supported in Lightning Experience. For the record that you want to share, click **Sharing**. Manually add any users who aren't included in sharing rules and share any related records.
- If you're an admin or you own an action plan template record, you can change the ownership of published and draft versions of action plan templates to another user. On the Action Plan record page, from the page-level action menu, click **Change Owner**. Then select the new owner.
- You can delete templates if their status is Draft or Obsolete and they don't contain any related action plans. On the Action Plan Templates page, click **Delete Template**.
- Don't create multiple versions of an action plan template by using APIs. A single version of an action plan template ensures that its status is unique. The status field of an action plan template depicts the status for a single version of the action plan template.
- Provide action plan templates to users whenever you share an action plan.
- An error occurs when deploying action plan templates in a sandbox created from a partial or developer copy of the production org. This error is caused due to existing ActionPlanTmplPkgConfig records which are copied into the sandbox by default. To fix the error, delete the cloned ActionPlanTmplPkgConfig records in the sandbox and then create the action plan templates.

Include More Fields in Action Plan Template Tasks

When creating tasks for action plan templates, you can capture more data for the tasks by including up to eight additional standard and custom fields in addition to the default fields, such as subject, priority, days, and comments.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To configure Action Plans:	Action Plans permission set OR Modify All Data

1. On the action plan template record page, click the Setup icon, and select **Edit Page**.
2. Click the Task component to select it.
3. In the Properties pane, under Fields to Include, click **Select** and move the desired fields to the Selected list, then reorder them as needed.

   Note Ensure that the data types of the new fields are picklist, checkbox, or text field. If ad hoc creation of tasks is enabled, create a task and then edit it again to view the new fields. You can add custom fields to templates, but dependent picklists aren't supported for action plan templates.

4. Click **OK** and save your changes.

Filter Action Plan Templates by Status

In the action plan templates list view, use the filter options to filter by status.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To configure Action Plans:	Action Plans permission set OR Modify All Data

1. In the Action Plan Templates list view, click the filter icon, then click **Add Filter**.
2. Set the **Status** field to the desired value and click **Done**.
3. Click **Apply**.
4. From the List View Controls menu, click **Select Fields to Display**.
5. Move **Status** to Visible Fields, and then click **Save**.
   The default status values are Draft, Obsolete, and Published. If your org has action plans migrated from another org, then those migrated action plan templates show a ReadOnly status.

Create Individual, Specific Action Plans from Templates

Action Plans allow you to capture repeatable tasks and then automate the task sequences improving collaboration and productivity. Using action plans, a team can automatically assign task owners and deadlines for specific client engagements. Action plans also make it easy to create reports and dashboards, so you can monitor progress and ensure compliance.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To configure Action Plans:	Action Plans permission set OR Modify All Data

1. From the App Launcher, click a target object to view the list of records.
2. To view the record details, click a record.
3. On the record details page, in the Action Plans section, click **New Plan**.
4. Enter a name for the action plan.
5. Select a date for the action plan to start.
6. Select an action plan template to create this action plan.
7. Select **Skip Nonwork Days for Tasks** if required.
8. Select the action plan status.
9. To review the provided details, click **Next**.
10. Save your changes.

Considerations for Creating Action Plans
Before you create action plans, review these considerations.

Considerations for Executing Action Plans

To execute an action plan, review these considerations.

See Also

Set Up Nonwork Days for Action Plans
Salesforce Help: Change a Record's Owner
Salesforce Help: Grant Access to Records with Manual Sharing in Lightning Experience

Considerations for Creating Action Plans

Before you create action plans, review these considerations.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

- Create action plans from the Action Plans tab on a record page for a supported object.
- If you don't want to start an action plan immediately, choose a future start date.
- Action plan template tasks assigned to the plan owner and tasks where the assigned user can't be resolved are assigned to you, the plan creator.
- For tasks assigned to a role where two or more users share the role, the task is assigned to you, the plan creator.
- To add nonwork days to the date offset when calculating the task completion date, select **Skip Nonwork Days**. Nonworking days are determined from the default business hours record. Each day without business hours and nonrecurring holidays is considered a nonwork day. Recurring holidays aren't identified as nonwork days.
- Some action plan templates let users add tasks or other items to a generated action plan. To add a task or other item to an action plan, click **New** in the list view of the type of item you want to add.
- Manual sharing of action plans is supported in Lightning Experience. For the record that you want to share, click **Sharing**. Manually add any users who aren't included in sharing rules and share any related records.
- If you're an admin or an action plan record owner, you can change the ownership of published and draft versions of action plans to another user. On the Action Plan record page, from the page-level action menu, click **Change Owner**. Then select the new owner.
- When you create action plans by using Salesforce Object Query Language (SOQL), limit the number of action plans to 200 per batch.

See Also

Set Up Nonwork Days for Action Plans
Salesforce Help: Set Up Document Types
Salesforce Help: Change a Record's Owner
Salesforce Help: Grant Access to Records with Manual Sharing in Lightning Experience

Considerations for Executing Action Plans

To execute an action plan, review these considerations.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

- Tasks and other items in an action plan are standard Action Plans records and appear in the usual places where those records are accessible.
- All standard task features are available to tasks created from action plans, such as updates and deletions.
- Action Plan template tasks are not dependent on each other, so you can perform and complete them in any order.

Show Action Plan Items in the Printable View

If you want the printable view to show tasks, document checklist items, and files, edit the Action Plan page layout. Then add the Tasks and Document Checklist Items related lists to the page layout.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To configure Action Plans:	Action Plans permission set OR Modify All Data

The printable view shows dependent tasks only if their prerequisite tasks are completed.

1. From the object management settings for action plans, go to **Page Layouts** and select a page layout.
2. In the palette, select **Related Lists**.
3. Drag **Tasks**, **Document Checklist Items**, and**Files** to the Related Lists section of the page layout.

4. Edit the fields in the related lists, then save your changes.

Customize the Display Order of Tasks and Document Checklist Items

Use the reorder capability to rearrange tasks and document checklist items in an action plan or action plan template.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To configure Action Plans:	Action Plans permission set OR Modify All Data

1. Open either the action plan or action plan template in which you want to reorder tasks.
2. Go to either the **Tasks** or **Document Checklist Items** section, and click **Reorder**.
3. Reorder the list by dragging or selecting its members.
   - Drag the tasks or document checklist items in the required sequence.
   - Select the task, and then to change the task's display order, click either the up or down arrow.
   - Sorting by fields is not supported for the task list component.
4. Save your changes.

Note What happens to the task sequence when you publish or clone an action plan template?

- If at least one existing task is reordered, then the system retains the custom sequence in either the cloned or published action plan template.
- If there are existing tasks but they aren’t reordered, then the cloned or published action plan template sorts the tasks according to the number of days to complete these tasks.
- If there are no existing tasks, then the cloned or published action plan template sorts any newly added tasks according to the number of days to complete these tasks.

Attach Files to Action Plans

Attach files to an action plan to reduce the overhead of attaching the same file or business collateral multiple times to various tasks of the same action plan.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To configure Action Plans:	Action Plans permission set OR Modify All Data

The standard Salesforce file upload limits are applicable.

1. Open the action plan to which you want to attach files and click the **Related** tab.
2. In the **Files** section, attach your files.
   - To attach files from a local drive, click **Upload Files**.
   - To attach files from a shared drive, click **Add Files**.
   - Drag a file from your system into the file selector drop zone.

     Note You can drag multiple files, but not a folder.

See Also

Show Action Plan Items in the Printable View

Salesforce Help: File Size and Sharing Limits

Schedule Recurring Action Plans

With a recurring schedule, you can create recurring action plans for repeatable business processes. Before creating a recurring schedule for action plans, identify the tasks that you must perform.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud,

and Public Sector Solutions. View edition availability.

Note Orchestration Flow for Recurrence Scheduler and Recurrence Schedule Flow apply only to Action Plans customers.

Before you create a recurring schedule for action plans, ensure that your Salesforce admin clones and activates the orchestration flow. If you don't want to use the recurring schedule later, you can deactivate it.

1. **Activate the Recurrence Schedule Flow for Action Plans**
   Before you create a recurring schedule for an action plan, clone Orchestration flow for Recurrence Scheduler and then activate it.
2. **Create or Edit Recurring Schedules for Action Plans**
   Create a recurring schedule for an action plan if you want the action plan to repeat periodically. You can change a recurring schedule after you've created it.
3. **Deactivate or Reactivate Recurring Schedules for Action Plans**
   When you create a recurring schedule, it's activated by default. If you don't want to use a recurring schedule, you can deactivate it. Deactivating a recurring schedule stops it from running until you reactivate it.

See Also

Enable Additional Permissions for Action Plans

Activate the Recurrence Schedule Flow for Action Plans

Before you create a recurring schedule for an action plan, clone Orchestration flow for Recurrence Scheduler and then activate it.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To configure Action Plans:	Action Plans permission set OR Modify All Data

1. From Setup, in the **Quick Find** box, enter *Flows*, and then select **Flows**.
2. Click **Orchestration flow for Recurrence Scheduler**.

3. To make a copy of this flow template, click **Save As**.
4. Provide a name for the flow and API.
5. Click **Save**.
6. Edit the flow start date and time according to your business requirements.
7. Save your changes.
8. Open the updated recurrence schedule flow, and then click **Activate**.

   Note After you clone flow elements, don't modify them. The recurrence schedule flow automatically generates a new action plan based on your settings. The flow runs a batch job at a predefined interval to find any action plans that are due for recurrence. When a new action plan is created, it's a complete clone of the original, inheriting all tasks and document checklist items. The new action plan's name is automatically generated and follows a specific pattern. For example, if your original action plan is named Quarterly Client Review, the new plan will be named Quarterly Client Review - Monthly Recurrence #1.

Create or Edit Recurring Schedules for Action Plans

Create a recurring schedule for an action plan if you want the action plan to repeat periodically. You can change a recurring schedule after you've created it.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To configure Action Plans:	Action Plans permission set OR Modify All Data

1. Open the action plan for which you want to either create or edit a recurring schedule.
2. On the action plan details page, click the dropdown arrow to view more actions, and then click **Recurrence Schedule**.
3. Select a date for the recurring schedule to start.
4. Select a recurrence pattern: Weekly, Biweekly, Monthly, Quarterly, or Yearly.
5. If you selected either the Weekly or Biweekly option, select days of the week.

   Note You can select one or more days.

6. Select an option for the recurring schedule to end:
   - **End on Date**: Select a date for the recurring schedule to end.

- **End After Number of Recurrences**: Enter an occurrence count that's greater than 0. The recurring schedule ends after the specified occurrences.

7. Save your changes.

Deactivate or Reactivate Recurring Schedules for Action Plans

When you create a recurring schedule, it's activated by default. If you don't want to use a recurring schedule, you can deactivate it. Deactivating a recurring schedule stops it from running until you reactivate it.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To configure Action Plans:	Action Plans permission set OR Modify All Data

1. Open the action plan for which you want to deactivate the associated recurring schedule.
2. On the action plan details page, click the dropdown arrow to view more actions, and then click **Recurrence Schedule**.
3. Select the **Deactivate** checkbox, and then save your changes.
4. If you want to reactivate the recurring schedule, open the action plan that contains the associated deactivated recurring schedule.
5. On the action plan details page, click the dropdown arrow to view more actions, and then click **Recurrence Schedule**.
6. Deselect the **Deactivate** checkbox, and then save your changes.

Update API Implementations of Action Plans

In Summer ’19, Action Plans expanded object support to more standard and custom objects. If your API implementation of Action Plans references `TargetId` and assumes it’s an account record, you must update your code.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

Before API version 46, Action Plans only supported the Account object. If you implemented Action Plans using automation, `TargetId` was the ID of the Account record that relates to an action plan.

Starting in API version 46, Action Plans supports multiple target objects, including Account, Campaign, Case, Contact, Contract, Lead, Opportunity, and more. You can also use Action Plans with custom objects that have activities enabled. This enhancement means that `TargetId` is now a polymorphic field key. Use `TargetEntityType` to determine the type of object the action plan template is based on. Then use `TargetId` to look up the record in the appropriate object's table.

Before version 47, Action Plan Templates could only contain task items. Starting in API version 47, Action Plan Templates can contain a mix of task, document checklist, and assessment task items. Task triggers that use API version 46 or less can fail if triggered by an Action Plan Template that contains different types of items. Solve this by upgrading task triggers to API version 47 or greater, or making sure that Action Plan Templates only contain one type of item.

You can't customize the ActionPlanTemplate object. Any updates to the object fields via the UI are applicable only to the local org and can't be retrieved by using Metadata APIs.

See Also

SOQL and SOSL Reference: Understanding Polymorphic Keys and Relationships
Apex Developer Guide: Working with Polymorphic Relationships in SOQL Queries
Cloud Flow Designer Guide: Cross-Object Field References in Flows: Polymorphic Relationships

Copy and Distribute Action Plan Templates

Create an action plan template based on an existing one by cloning it. Share action plan templates between organizations by packaging them.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

Action plan template cloning simplifies changes like correcting a typo in an associated task name or creating an action plan template based on an existing one.

With action plan template packaging, create and test action plan templates in a sandbox environment, and then deploy them in one or more production environments. You can upload packaged action plan templates to AppExchange. To use an action plan template that you installed through a package, you must clone the template and use the copy.

Clone Action Plan Templates

Simplify action plan template creation with cloning. When your business process changes, clone your existing action plan template and make changes rather than staring from scratch. You can use cloning to easily correct errors in existing action plan templates. Users can also clone an existing template as a reference to create a different version for their own use. After you install action plan templates through a package, clone the templates and use the copies.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

1. Open the action plan template that you want to copy.
2. Click **Clone Template**.
3. Enter a new name and description for the template. Leave the rest of the fields unchanged.
4. Save your changes.

Create a Package with Action Plan Templates

Share action plan templates between organizations with packaging. For instance, create and test an action plan template in a sandbox environment and deploy in production when the template is ready. Once you've created a package with your action plan templates, upload the package to get an installation URL that you can distribute.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To create packages:	Create AppExchange Packages
To upload packages:	Upload AppExchange Packages
To install packages:	Download AppExchange Packages

1. From Setup, in the Quick Find box, enter `Package Manager`, and then select **Package Manager**.
2. Under Packages, click **New**.
3. Enter a name for the package, and click **Save**.
4. On the Components tab, click **Add**.
5. From the Component Type list, select **Action Plan Template**.
6. Select the templates that you want to add to the package, and click **Add to Package**.
7. Click **Upload**.
8. Enter a version name and a version number for the package.
9. Click **Upload**.
10. Make a note of the installation URL. Use this URL to install the packaged templates in other orgs.

Important When you install action plan templates through a package, the templates are deployed in the read-only format. Clone the templates and use the copies. Deployed action plan templates can't be deleted.

See Also

Clone Action Plan Templates

Second-Generation Managed Packaging Developer Guide: Develop Second-Generation Managed Packages

Second-Generation Managed Packaging Developer Guide: Install Second-Generation Managed Packages

Set Up Action Plans in Experience Cloud Sites

Create and assign a community user profile and a permission set that give Experience Cloud site users access to action plans. Then, add action plans to your site's home page and record detail pages.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

Create a Community User Profile for Action Plan Access

Create a customer or partner community profile with necessary object permissions to give site users access to action plans and action plan templates.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To create profiles:	Manage Profiles and Permission Sets

Note Salesforce offers two ways to work with profiles: the enhanced profile user interface and the original profile user interface. You can switch between the two in Setup. Search for and select **User Management Settings**, and then turn on or turn off Enhanced Profile User Interface. These instructions are for the enhanced profile user interface.

1. From Setup, in the Quick Find box, enter `Profiles`, then select **Profiles**.
2. On the Profiles page, next to a customer or partner community profile, click **Clone**.
   Your Experience Cloud license determines which community profiles are available in your org.
3. Enter a name for the cloned profile and save it.

4. In the object settings for the profile, assign the appropriate level of Create-Read-Update-Delete (CRUD) access for Action Plans, Action Plan Templates, and Document Checklist Items.
5. Save your changes.

To check if your site requires additional object or system permissions on the community user profile, check your cloud's documentation, and edit the profile as necessary. For instructions on editing the profile, see Profiles. For instructions on assigning the profile, see Add Members to Your Experience Cloud Site or see your cloud's documentation for instructions on how to enable customer or partner users on your site.

Create a Permission Set for Action Plan Access on Experience Cloud Sites

Create a permission set with the action plans feature enabled and assign it the Experience Cloud site users.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To create and assign permission sets:	View Setup and Configuration AND Assign Permission Sets

The permission set license that provides site users access to action plans differs for each Salesforce Industries product. If you're unsure which permission set license is required for your site users, consult your Salesforce account executive.

To create and assign a permission set that includes access to the action plans feature:

1. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.
2. Click **New**.
3. Enter a label and then press **Tab** to populate the API name.
4. For License, select a permission set license that includes action plans access.
   For example, For Financial Services Cloud, select Financial Services Community Extension. For Public Sector Solutions, select Licensing and Permitting Management For Communities or Benefit Assistance For Communities, depending on your use case.

5. Save your work.
6. Click **System Permissions**, and then click **Edit**.
7. Enable permissions for action plans and for document checklist items.
   For example, in the cloned permission set based on the Licensing and Permitting Management For Communities permission set license, enable **Permission to access the Action Plans feature**.
8. Save your changes.
9. Assign the newly-created permission set to site users.
   a. Click **Manage Assignments**, and then click **Add Assignments**.
   b. Select the users you want to assign the permission set to, and click **Next**.
   c. Click **Assign**, and then click **Done**.
   When you assign a permission set to a user, the relevant permission set license is automatically assigned to them.

See Also

Salesforce Help: Create Permission Sets

Salesforce Help: Add Members to Your Experience Cloud Site

Update the Experience Cloud Home Page with Action Plan Templates

Show action plan list on your Experience Cloud site's home page.

REQUIRED EDITIONS

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Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To customize an Experience Cloud site:	Be a member of the site AND Create and Set Up Experiences OR Be a member of the site AND View Setup and Configuration AND Be an experience admin, publisher, or builder in that site

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.
2. Click **Builder** for the site that you want to edit.
3. Click , and drag the Action Plan List component onto the page.
4. In the Action Plan List property window, enter the number of records that you want to see in the list.

5. Preview and publish the changes.

See Also

Salesforce Help: Set Up and Configure Your Org for Experience Cloud Sites
Salesforce Help: Build and Customize Your Experience Cloud Site

Update the Experience Cloud Site Record Detail Page with Action Plans

Show action plan lists on record detail pages in Experience Cloud sites.

REQUIRED EDITIONS

Available in: Lightning Experience
Available in: Automotive Cloud, Consumer Goods Cloud, Education Cloud, Financial Services Cloud, Government Cloud with Lightning Scheduler, Health Cloud, Manufacturing Cloud, Nonprofit Cloud, and Public Sector Solutions. View edition availability.

USER PERMISSIONS NEEDED	
To customize an Experience Cloud site:	Be a member of the site AND Create and Set Up Experiences OR Be a member of the site AND View Setup and Configuration AND Be an experience admin, publisher, or builder in that site

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **All Sites**.
2. Click **Builder** for the site that you want to edit.
3. From the Pages menu, select or create a record detail page.
4. Click , and drag the Action Plans Related List component onto the page.
5. Preview and publish the changes.

See Also

Salesforce Help: Set Up and Configure Your Org for Experience Cloud Sites
Salesforce Help: Build and Customize Your Experience Cloud Site