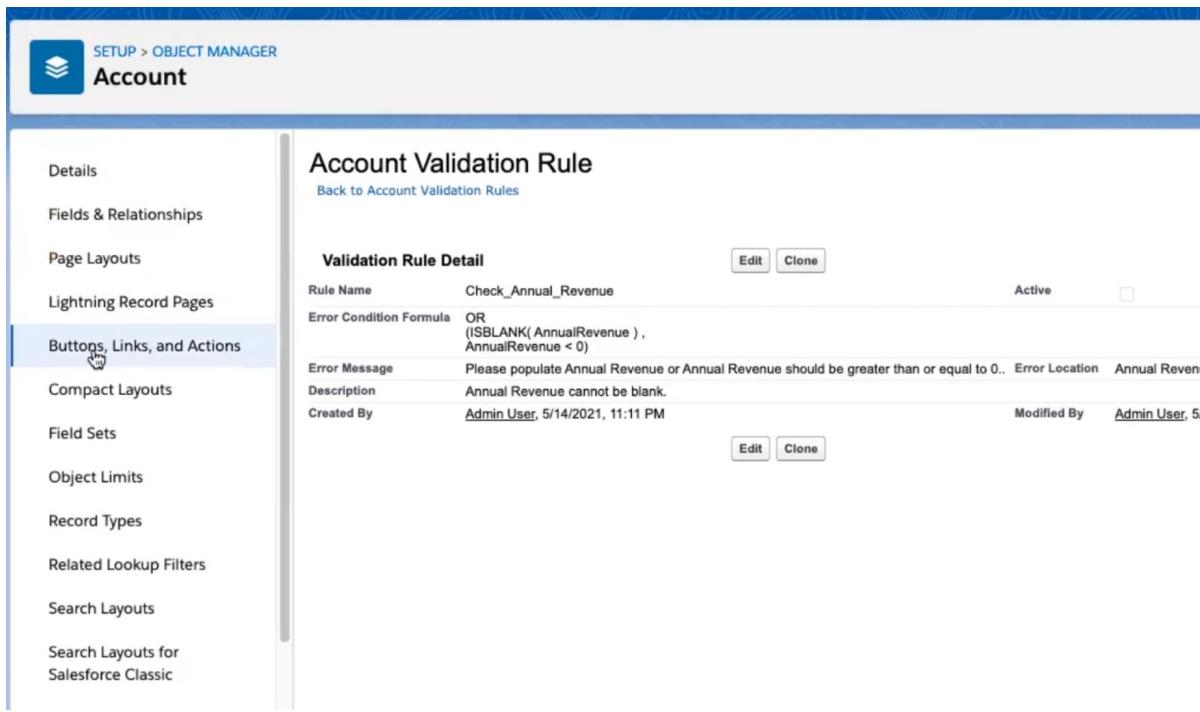


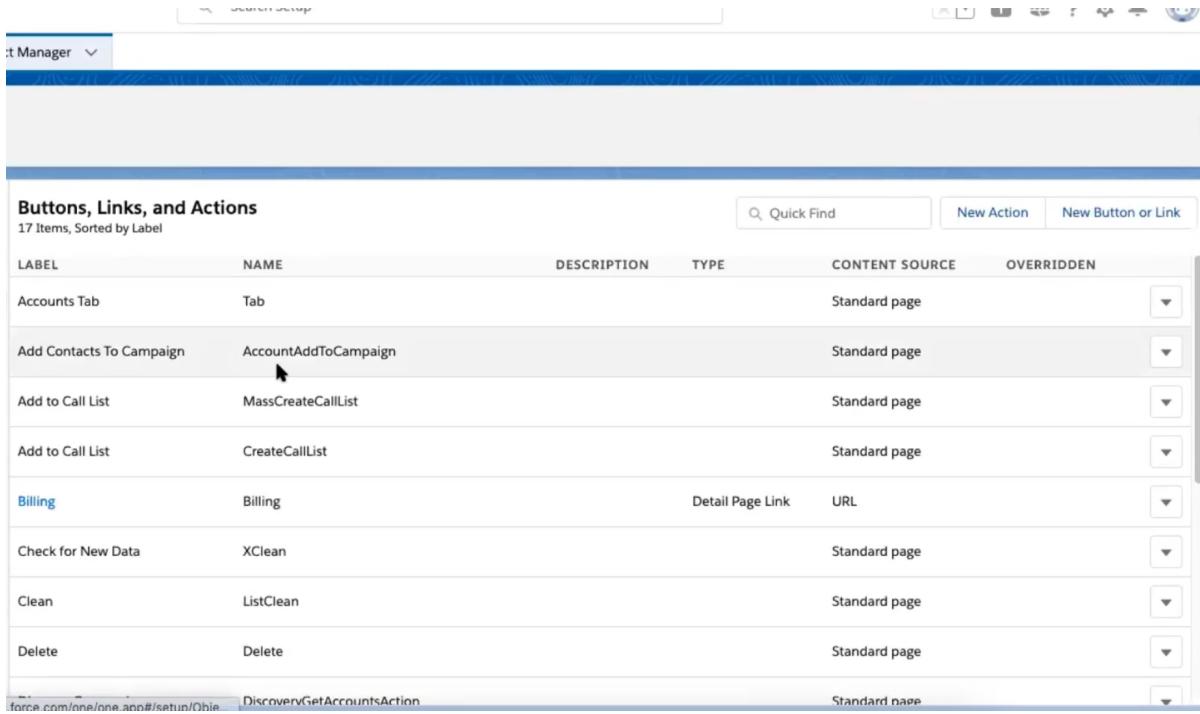
WW

**Step 1:** Go to the Account Object and click on the Button, Links, and Actions option.



The screenshot shows the Salesforce Setup interface under the Object Manager for the Account object. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions (which is highlighted with a mouse cursor), Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and Search Layouts for Salesforce Classic. The main content area displays the 'Account Validation Rule' detail page for a validation rule named 'Check\_Annual\_Revenue'. The rule is active and has an error condition formula: OR (ISBLANK(AnnualRevenue), AnnualRevenue < 0). The error message is 'Please populate Annual Revenue or Annual Revenue should be greater than or equal to 0..'. The description is 'Annual Revenue cannot be blank.' and it was created by 'Admin User' on 5/14/2021 at 11:11 PM. There are 'Edit' and 'Clone' buttons for the rule.

**Step 2:** Now click on the New Action button.



The screenshot shows the 'Buttons, Links, and Actions' list screen. The top navigation bar includes 'Object Manager' and other setup tabs. The main title is 'Buttons, Links, and Actions' with a note '17 Items, Sorted by Label'. Below the title is a search bar labeled 'Quick Find' and buttons for 'New Action', 'New Button or Link', and 'New Tab'. A table lists 17 items, each with columns for 'LABEL', 'NAME', 'DESCRIPTION', 'TYPE', 'CONTENT SOURCE', and 'OVERRIDDEN'. The items listed are: Accounts Tab (Tab, Standard page), Add Contacts To Campaign (AccountAddToCampaign, Standard page), Add to Call List (MassCreateCallList, Standard page), Add to Call List (CreateCallList, Standard page), Billing (Billing, Detail Page Link, URL), Check for New Data (XClean, Standard page), Clean (ListClean, Standard page), Delete (Delete, Standard page), and a system item (DiscoveryGetAccountsAction, Standard page). Each row has a 'More' dropdown menu icon.

**Step 3:** Now, we need to fill out this information. Action Type will be Create a Record, Target Object as Contact, Label and Name as New Contact Creation, and click save.

Actions

Action

Quick Action Information

Object Name	Account
Action Type	Create a Record
Target Object	Contact
Standard Label Type	--None--
Label	New Contact Creation
Name	New_Contact_Creation
Description	
Create Feed Item	<input checked="" type="checkbox"/>
Success Message	
Icon	

Saving... Saving...

**Step 4:** Now, the following layout will be available. So, leave it as is and click on save. After that, quick action will be created.

Save Quick Save Preview As... Cancel Undo Redo

Contact Fields

Quick Find Field Name

Blank Space	Birthdate	Description	Email Opt Out	Home Phone	Level	Other Address
Account Name	Contact Level	Designation	Fax	Individual	Mailing Address	Other Phone
Assistant	Contact Owner	Do Not Call	Fax Opt Out	Languages	Mobile	Phone
Asst. Phone	Department	Email	Hobbies	Lead Source	Name	Reports To

Name \*  
Sarah Sample

Email  
sarah.sample@company.com

Phone  
1-415-555-1212

Account Name  
Sample Text

Title  
Sample Text

**Step 5:** You need to place that quick action on a particular page layout. So, Click on Account Layout.

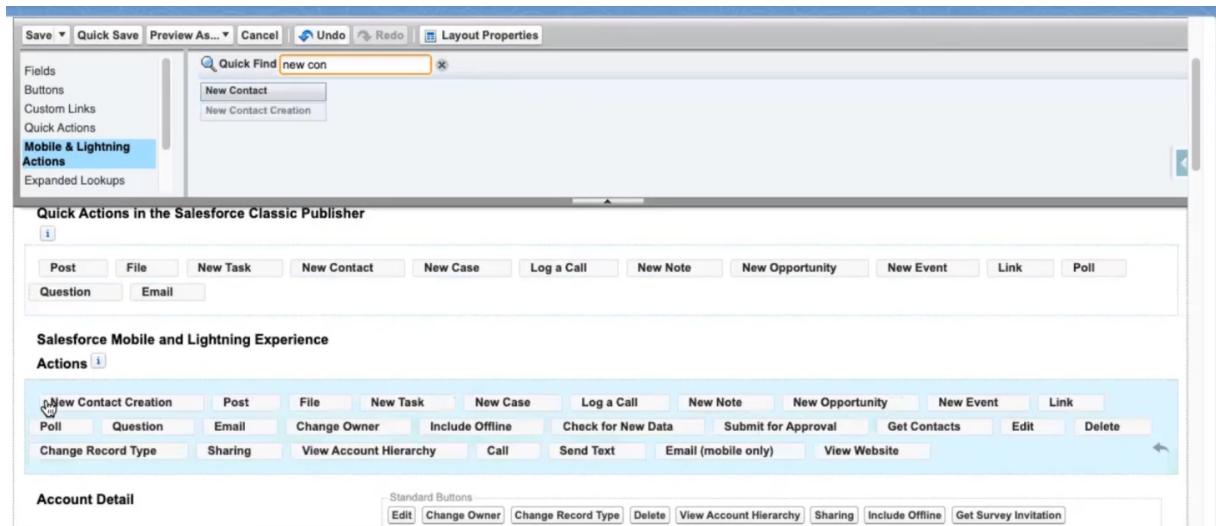
The screenshot shows the Salesforce Object Manager interface for the Account object. On the left, there's a sidebar with various options like Details, Fields & Relationships, Page Layouts (which is selected and highlighted in blue), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area is titled "Page Layouts" and shows a list of 6 items, sorted by Page Layout Name. The columns are "PAGE LAYOUT NAME", "CREATED BY", and "MODIFIED BY". The items listed are: Account (Marketing) Layout, Account (Sales) Layout, Account (Support) Layout, Account Layout, Business Account Layout, and Individual Account Layout. Each item shows the creation date and time, and the user who modified it last.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Account (Marketing) Layout	Admin User, 4/4/2021, 12:37 AM	Admin User, 4/5/2021, 9:25 PM
Account (Sales) Layout	Admin User, 4/4/2021, 12:37 AM	Admin User, 4/5/2021, 9:24 PM
Account (Support) Layout	Admin User, 4/4/2021, 12:37 AM	Admin User, 4/5/2021, 9:24 PM
Account Layout	Admin User, 4/4/2021, 12:37 AM	Admin User, 5/21/2021, 10:10 PM
Business Account Layout	Admin User, 5/15/2021, 12:41 AM	Admin User, 5/15/2021, 12:41 AM
Individual Account Layout	Admin User, 5/15/2021, 12:40 AM	Admin User, 5/15/2021, 12:40 AM

**Step 6:** Now, Click on the Mobile & Lightning Actions and search for the New Contact Creation.

The screenshot shows the "Layout Properties" window for a specific page layout. At the top, there are buttons for Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. Below this is a "Quick Find" bar with the text "new con". The main area is divided into sections: Fields, Buttons, Custom Links, Quick Actions, and Mobile & Lightning Actions. The "Mobile & Lightning Actions" section is currently selected and highlighted in blue. Under this section, there are two actions: "New Contact" and "New Contact Creation". At the bottom, there's a section titled "Quick Actions in the Salesforce Classic Publisher" with several buttons for different actions: Post, File, New Task, New Contact, New Case, Log a Call, New Note, New Opportunity, Question, and Email.

**Step 7:** Drag New Contact Creation on Quick Actions, and after that, click on save.



**Step 8:** Moving to the account tab and you can open any particular record. For example, you can click on Express Logistics and Transport.

Accounts		Recently Viewed	More
9 items - Updated a few seconds ago			
1	Test Acc 123	1234567	
2	Express Logistics and Transport	(503) 421-78001	
3	Individual Acc		
4	Buss Acc		
5	Acc 123		
6	Account Test 11	123456745	
7	Edge Communications	(512) 757-6000	
8	Dickenson plc	(785) 241-6200	
9	Burlington Textiles Corp of America	(336) 222-7000	

**Step 9:** Now click on the New Contact Creation to fill in all the details. And then click on the Save button.

The screenshot shows the Salesforce interface for creating a new contact. At the top, there is a navigation bar with buttons for '+ Follow', 'New Contact Creation' (which is highlighted with a cursor), 'New Case', and 'New Note'. Below the navigation bar, a blue banner states 'This component will be placed on Record Page'. The main area is titled 'Activity' and shows a 'New Contact Creation' form. The form fields include: Name (Salutation: None, First Name: Test, Last Name: Test 123), Email, Phone, Account Name (Express Logistics and Transport), and Title. At the bottom right of the form are 'Cancel' and 'Save' buttons. On the left side of the screen, there is a sidebar for the account 'Express Logistics and Transport' showing 'Account History (4)' and 'Contacts (2)'. The contact list shows three contacts: 'Josh Davis', 'Babara Levy', and 'Test Test 123' (which is currently selected).

**Step 10:** In the related list of this account, you can see Test Test 123 contact is created.

The screenshot shows the 'Contacts' related list for the account 'Express Logistics and Transport'. The list displays three contacts: 'Josh Davis', 'Babara Levy', and 'Test Test 123'. The contact 'Test Test 123' is currently selected, as indicated by the cursor hovering over its name. To the right of the contact list, there is a sidebar with sections for 'Upcoming' (with a green calendar icon), 'May • 2021' (with a red calendar icon), 'Discussions' (with a blue speech bubble icon), and 'Calls' (with a blue phone icon). At the bottom of the contact list, there are 'View All' and 'New' buttons.