

**Step 1:** The first step is to go to the quick search and search for action. If you scroll down, the global action option will appear. So, Click on the Global Action button.

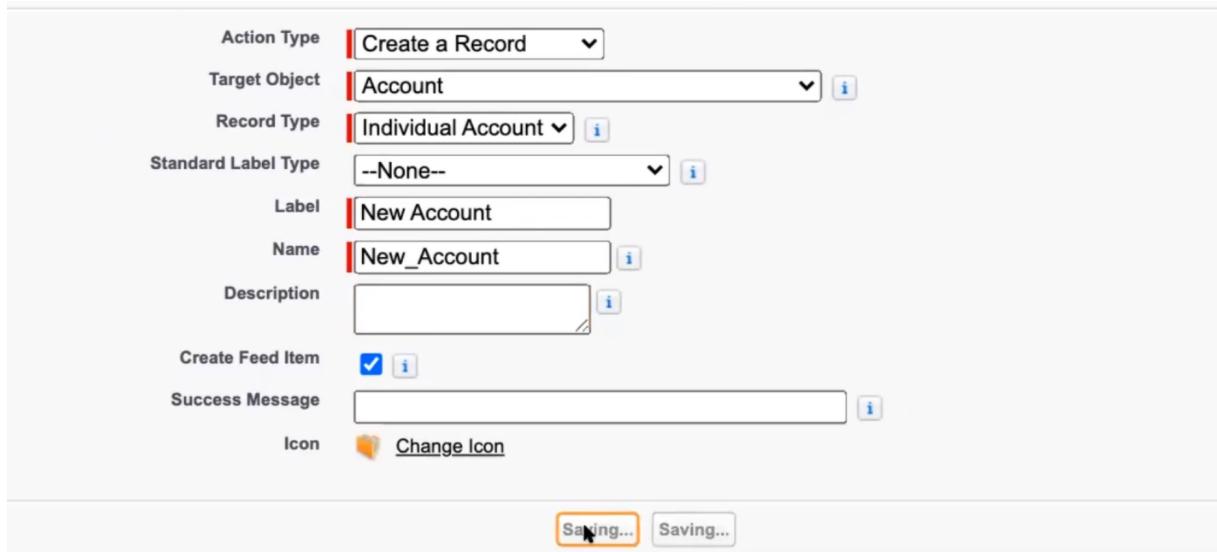
The screenshot shows the Salesforce Setup Home page. In the left sidebar, under the 'Global Actions' section, there is a 'Global Actions' button with a hand cursor icon, indicating it is being clicked. The main content area displays two cards: 'Get Started with Einstein Bots' and 'Mobile Publisher'.

**Step 2:** You can see almost all the actions are already available. Now if you want to create a new global action so you can click on New Action.

The screenshot shows the 'Global Actions' list page in the Salesforce Setup. The top navigation bar includes 'SETUP' and 'Global Actions'. The main content area is titled 'Global Actions' and contains a table listing various global actions. The table has columns for Action, Label, Name, Description, Target Object, Type, Content Source, and Icon. A 'New Action' button is located at the top right of the table header. The table lists actions such as 'Edit | Del | Layout Email' (Label: SendEmail, Type: Send Email, Content Source: Action Layout Editor), 'Edit | Del | Layout Log a Call' (Label: LogACall, Type: Log a Call, Content Source: Action Layout Editor), and many others like 'New Account', 'New Case', etc.

**Step 3:** Now you need to select any Action Type for example you can select Create a Record, Target Object should be Account, Record Type will be Individual Account, then Standard Label

Type, you can leave it as None. You can put Label as New Account. After that click on the Save button.



Action Type: Create a Record

Target Object: Account

Record Type: Individual Account

Standard Label Type: --None--

Label: New Account

Name: New\_Account

Description:

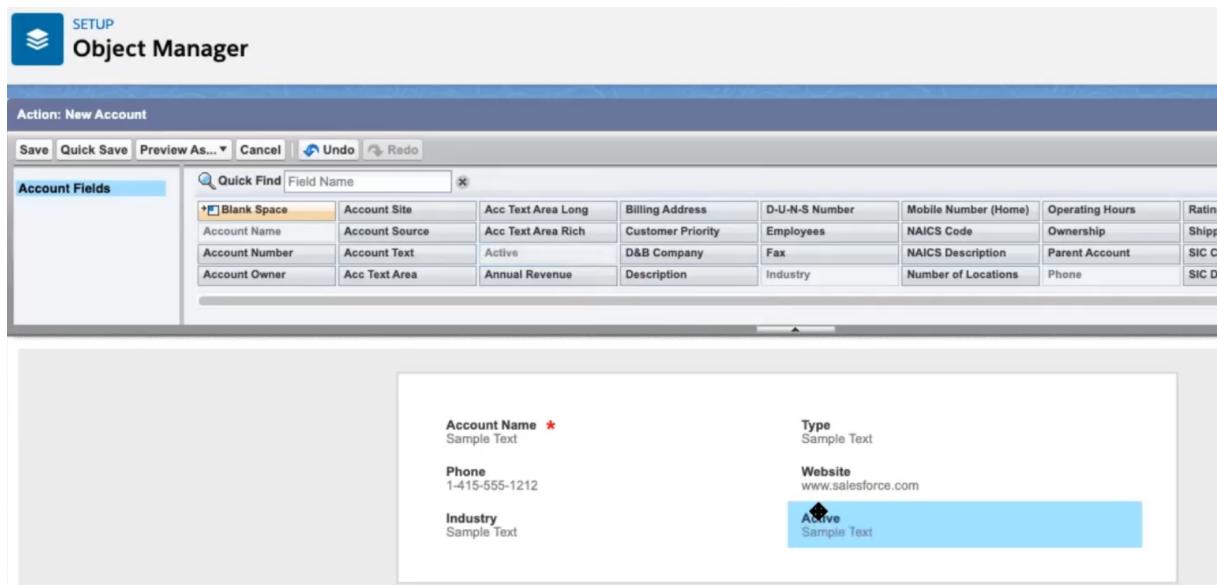
Create Feed Item:

Success Message:

Icon: Change Icon

Saving... Saving...

**Step 4:** After Creating global action, you can choose the fields you want to place on that global action layout by just drag and drop a particular field on the layout. After that, you can click on save.



SETUP

Object Manager

Action: New Account

Save Quick Save Preview As... Cancel Undo Redo

Account Fields

	Blank Space	Account Site	Acc Text Area Long	Billing Address	D-U-N-S Number	Mobile Number (Home)	Operating Hours	Rating
+Blank Space	Account Name	Account Source	Acc Text Area Rich	Customer Priority	Employees	NAICS Code	Ownership	Shipping
Account Number	Account Text	Active	D&B Company	Fax	NAICS Description	Parent Account	SIC Code	SIC Description
Account Owner	Acc Text Area	Annual Revenue	Description	Industry	Number of Locations	Phone	SIC Des	SIC Description

Account Name \*  
Sample Text

Type  
Sample Text

Phone  
1-415-555-1212

Website  
www.salesforce.com

Industry  
Sample Text

**Step 5:** After creating global action, you need to click on the Publisher Layouts button.

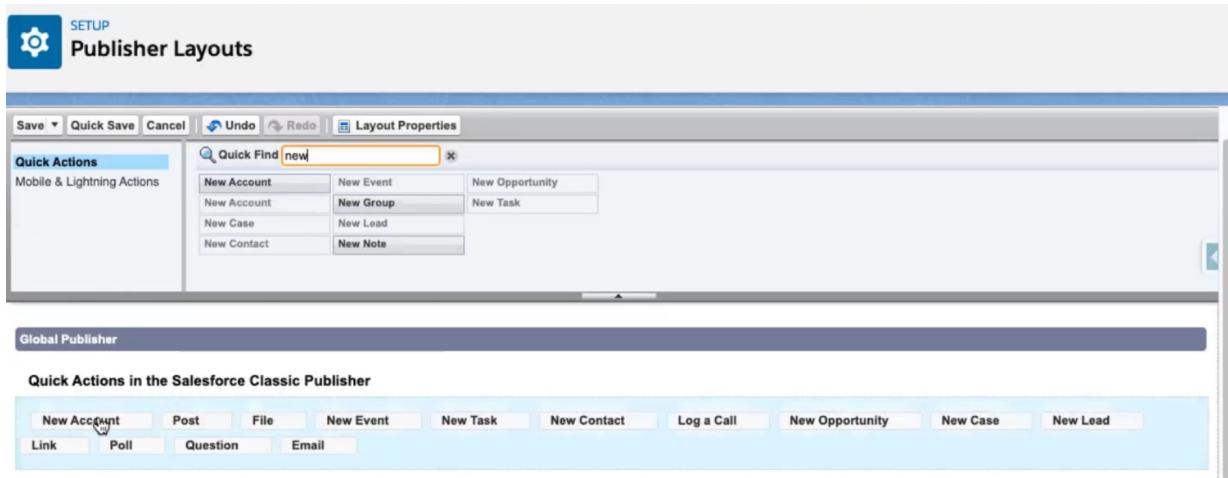
The screenshot shows the Salesforce Setup Home page. On the left, there is a sidebar with various categories: Process Automation, Workflow Actions, User Interface, Security, and Event Monitoring. Under User Interface, the 'Global Actions' section is expanded, and the 'Publisher Layouts' item is highlighted with a mouse cursor. The main content area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time'. Below these cards is a section titled 'Most Recently Used' which lists 10 items. The 'NAME' and 'TYPE' columns are visible.

**Step 6:** Now you need to click on edit from the Publisher Layouts.

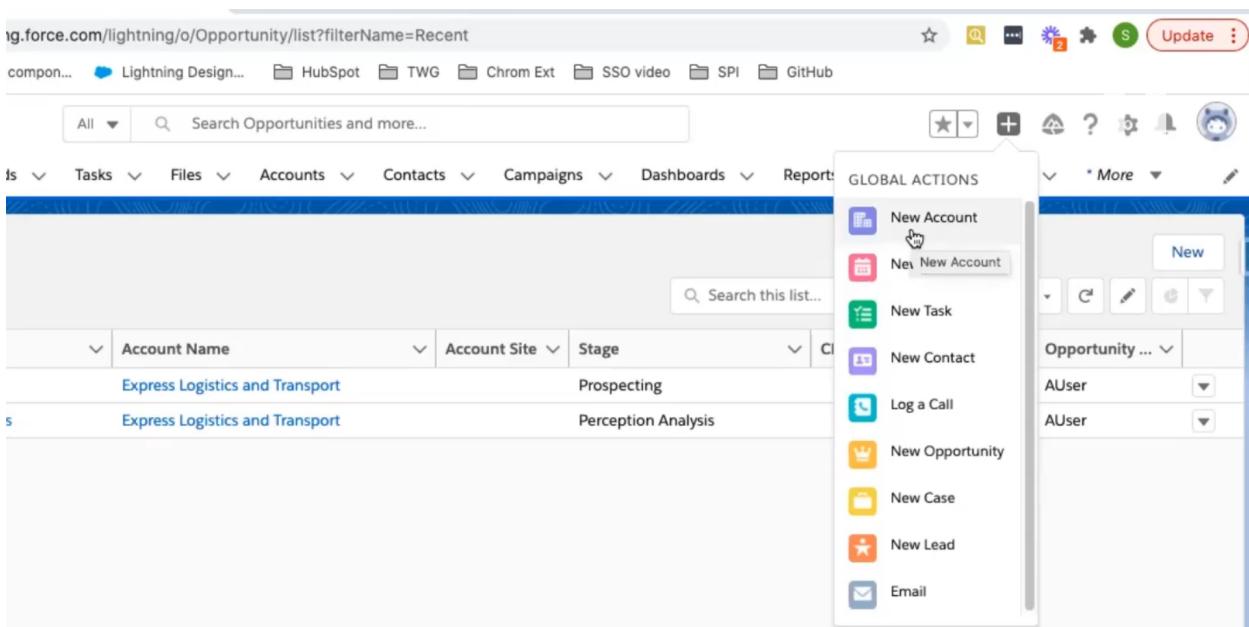
The screenshot shows the 'Global Publisher Layouts' page. At the top, there is a header with a gear icon and the text 'SETUP Publisher Layouts'. Below the header, a section titled 'Global Publisher Layout' is displayed with the following text: 'This page allows you to create layouts of actions on Chatter publishers for global pages such as Home, Chatter Home, and User Profile. After creating global publisher layouts, you can assign user profiles. Click the Publisher Layout Assignment button to control which actions users see by default in the publisher on global pages.' A table titled 'Global Publisher Layouts' is shown, containing one row with the following data:

Action	Publisher Layout Name	Created By	Modified By
Edit   Del	Global Layout	Admin User 4/4/2021, 12:37 AM	Admin User 4/4/2021, 12:37 AM

**Step 7:** And then you need to search for the new account and then drag down the New Account and place it on the Global Publisher Section and Click on the Save button.



**Step 8:** When you click on the plus icon, you will be able to see New Account is available in the Global Action.



**Step 9:** Now Click on the New Account, you will see that all 6 fields are available that you can fill in, and then you can click on the save option. So, that it can save the record successfully.

The screenshot shows the Salesforce Lightning Experience. On the left, there is a sidebar with sections like 'and Transport', 'Prospecting', 'and Transport', and 'Perception An...'. A modal window titled 'Test Acc 123' is open in the center. It contains fields for 'Account Name' (set to 'Test Acc 123'), 'Type' (set to 'Prospect'), 'Phone' (set to '1234567'), 'Website' (empty), 'Industry' (set to 'Chemicals'), and 'Active' (set to 'Yes').

**Step 10:** You are able to see that in the Account Section Test Acc 123 is available.

The screenshot shows the Salesforce Accounts page. At the top, there is a navigation bar with links for 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', and 'Report'. Below the navigation bar, a section titled 'Recently Viewed' lists 9 items, updated a few seconds ago. The list includes: 1. Test Acc 123, 2. Express Logistics and Transport, 3. Individual Acc, 4. Buss Acc, 5. Acc 123, 6. Account Test 11, and 7. Edge Communications. There are also buttons for 'Search this list...' and a refresh icon.