Quick Actions Implementation Guide

Salesforce, Winter '16



@salesforcedocs

Last updated: November 6, 2015

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ACTIONS

Actions add functionality to Salesforce. Choose from standard actions, such as create and update actions, or create actions based on your company's needs.

Create actions and add them to the Chatter publisher on the home page, on the Chatter tab, in Chatter groups, and on record detail pages. In Salesforce Classic, actions appear in the Chatter publisher. In Lightning Experience, actions appear in different areas of the user interface, depending on the action's type. In Salesforce1, actions appear in the action bar, its associated action menu, and as list-item actions.

Actions enable users to do more in Salesforce and in Salesforce1. For example, create or update records and log calls directly in the Chatter feed or from users' mobile devices.

There are several categories of actions, such as standard Chatter actions, nonstandard actions, default actions, mobile smart actions, custom actions, and productivity actions. Which actions are available in the full Salesforce site depends on whether your organization has Chatter, feed tracking, and actions in the publisher enabled. Actions in Salesforce1 don't rely on whether Chatter or actions in the publisher are enabled. For how Chatter enablement affects action visibility, see "Actions with and without Chatter" in the Salesforce Help.

Category	Description	Included Actions	Where They Display
Standard Chatter actions	Standard Chatter actions are included when Chatter is enabled. You can customize the order in which these actions appear, but you can't edit their properties. Standard Chatter actions require that feed tracking for objects is enabled.	Post, File, Link, Poll, Question, Thanks (Work.com), and Announcements (Groups)	Salesforce and Salesforce1 Only Post and Announcements are supported in Lightning Experience
Nonstandard actions	Nonstandard actions are actions that you create and customize yourself. The actions can be global or object-specific.		Salesforce and Salesforce1
Default actions	Default actions are Salesforce predefined actions to get you and your users started using actions in your organization. Add default actions to publisher layouts to make them available to your users in the full Salesforce site and the action bar in Salesforce1.	Depends on the object. For a list of global actions and which default actions apply to which object, see Default Actions on page 4.	Salesforce and Salesforce1

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Quick actions available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Contact Manager**, **Database.com**, and **Developer** Editions

Custom canvas actions available in: **Professional** (with Force.com Canvas enabled), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Category	Description	Included Actions	Where They Display
	Default actions are supported on account, case, contact, lead, and opportunity objects.		
Mobile smart actions	Mobile smart actions are a set of preconfigured actions, just like default actions, and are supported on the same list of objects. Mobile smart actions appear as a single element in the page layout editor. In Salesforce1, the Mobile Smart Actions element expands to a set of distinct create actions that enable users to create records directly in the feed.	Depends on the object. For a list of which actions the Mobile Smart Actions element expands to include for each object, see Mobile Smart Actions on page 8.	Salesforce1
Custom actions	*Custom actions* are Visualforce pages or canvas apps with functionality that you define. For example, you can create a custom action so that users can write comments that are longer than 5,000 characters, or create one that integrates a video-conferencing application so that support agents can communicate visually with customers. Custom actions can be global or object-specific.	Custom actions that you create.	Salesforce and Salesforce1 Not supported in Chatter groups with customers
Productivity actions	Productivity actions are predefined by Salesforce and are attached to a limited set of objects. You can't edit or delete productivity actions. Productivity actions appear on these objects. • Account • Contact • Event • Lead • User • User Profile	Depends on the object. The actions include Send Email, Log a Call, Map, View Website, and Read News.	Salesforce (Lightning Experience only) and Salesforce1

Within the categories of actions, you can have different types of actions, depending on their function.

- *Create actions* let users create records. They're different from the Quick Create and Create New features on the Salesforce home page, because create actions respect validation rules and field requiredness, and you can choose each action's fields.
- *Log a call actions* let users record the details of phone calls or other customer interactions. These call logs are saved as completed tasks.
- *Question actions* enable users to ask and search for questions about the records that they're working with.

- *Send email actions*, available only on cases, give users access to a simplified version of the Case Feed Email action on Salesforce1.
- *Update actions* let users make changes to a record.

For create, log-a-call, and custom actions, you can create either object-specific actions or global actions. Update actions must be object-specific.

DEFAULT ACTIONS

Default actions are Salesforce predefined actions to get you and your users started using actions in your organization. Add default actions to publisher layouts to make them available to your users in the full Salesforce site and the action bar in Salesforce1.

Each default action has a predefined set of fields. Use the page layout editor or global publisher layout to remove actions or to change the order in which the actions appear.

This table lists the available default actions. Italicized actions are standard Chatter actions.

Note: In organizations that are created after Winter '14, Salesforce adds default actions to the global publisher layout and to the publisher layout on account, case, contact, lead, and opportunity objects. In organizations that were created before Winter '14, default actions are available in the palette on the page layout editor, but they're not automatically added to publisher layouts.

Layout Page	Default Actions
Global layout (also applies to custom objects)	• *Post* • *File* • New Event • New Task • New Contact • Log a Call (logged calls are saved as completed tasks) • New Opportunity • New Case • New Lead • *Thanks* • *Link* • *Poll* • *Question*
Account	• *Post* • *File* • New Event • New Task • New Contact • New Case • Log a Call (logged calls are saved as completed tasks) • New Note

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Available in:
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- Enterprise
- Performance
- Unlimited
- Contact Manager
- Developer

Layout Page	Default Actions
	• New Opportunity • *Thanks* • *Link* • *Poll* • *Question*
Case	• *Post* • *File* • New Child Case • Log a Call (logged calls are saved as completed tasks) • New Task • New Event • *Thanks* • *Link* • *Poll* • *Question*
Contact, Lead, and Opportunity	• *Post* • *File* • New Task • Log a Call (logged calls are saved as completed tasks) • New Case • New Note • New Even • *Thanks* • *Link* • *Poll* • *Question*

Note: Using record types in your organization can affect the availability of global default actions for your users. For more information, see Quick Actions and Record Types on page 24.

Default Action Fields

Each default action includes a pre-defined set of fields, which lets you make actions available to your users without spending a lot of time on setup.

These fields are included on each default action and appear in the action layout in the order listed.

Action	Fields
Log a Call	• Subject (default value: Call) • Comment (description) • Name • Related To
New Case and New Child Case	• Contact Name • Status • Subject • Description
New Contact	• Name • Email • Phone • Account Name • Title
New Event	• Subject • Start • End • All-Day Event • Name • Related To • Assigned To • Location
New Lead	• Name • Email • Phone • Company • Title
New Note	• Title • Public (checkbox)

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Action	Fields
	• Body
New Opportunity	• Opportunity Name • Account • Close Date (default value: 30 days from today) • Stage • Amount
New Task	• Subject • Due Date • Name • Related To • Assigned To • Status

You can change the fields that appear on each action layout using the action layout editor.

MOBILE SMART ACTIONS

Mobile smart actions are quick actions that are available for account, case, contact, lead, and opportunity pages and on the global publisher layout in Salesforce1. You can use them to set up quick actions for mobile users with little effort.

Note: Mobile smart actions don't appear in the full Salesforce site, regardless of which page layouts you add them to. They appear only to users in Salesforce1. If you have users who access Salesforce on mobile devices more frequently than they access the full site, consider creating specific page layouts for them and including mobile smart actions only on those layouts.

Mobile smart actions are populated with all your organization's required fields on the relevant object, regardless of how many fields there are. For example, the New Case action in the mobile smart action bundle includes all required case fields. You can't edit the fields on mobile smart actions. The fields that appear change only if you change which fields on an object are required.

You also can't change which actions are included as part of a mobile smart actions bundle—removing New Event or adding a custom action, for example. To create a more customized set of actions, create the actions you want, add them to the relevant page layouts, and remove the mobile smart actions bundle.

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Mobile smart actions appear as a single action element in the page layout editor. However, they appear in the action bar and action menu in Salesforce1 as distinct create actions. These distinct actions allow users to create records directly from the action bar.

Here's what the mobile smart action element on each supported object expands to include. (The actions appear in the action bar and menu in the order shown.)

Layout	Actions Included in Mobile Smart Action Bundle
Global layout (also applies to custom objects)	• New Task • New Contact • Log a Call (logged calls are saved as completed tasks) • New Opportunity • New Case • New Lead
Account	• New Task • New Contact • New Case • Log a Call (logged calls are saved as completed tasks) • New Note • New Opportunity
Case	• New Child Case • Log a Call (logged calls are saved as completed tasks)

Layout	Actions Included in Mobile Smart Action Bundle
	• New Task • New Event
Contact	• New Task • Log a Call (logged calls are saved as completed tasks) • New Case • New Note • New Event
Lead	• New Task • Log a Call (logged calls are saved as completed tasks) • New Case • New Note • New Event
Opportunity	• New Task • Log a Call (logged calls are saved as completed tasks) • New Case • New Note • New Event

SETTING UP QUICK ACTIONS

1. Enable feed tracking for the objects for which you want to make actions available.
2. Enable actions in the publisher if you want to see both standard actions and non-standard actions in the Chatter publisher.
3. Optionally, enable feed updates for related records to display feed items on a record detail page when related records are created.
4. Create object-specific actions or global actions.
5. Customize the action layout with the fields that you want users to see when they use the action.
6. Add the actions to page layouts or global publisher layouts.

   Salesforce automatically adds default actions to the page layouts for account, case, contact, lead, and opportunity, and to the global publisher layout in organizations that were created after Winter '14.

USER PERMISSIONS

To set up actions:
- "Customize Application"

Enable Actions in the Chatter Publisher

Enabling actions in the publisher lets you add actions you've created to Chatter publishers on the Home page, on the Chatter tab, in Chatter groups, and on record detail pages.

By default, the Chatter publisher includes the standard actions Post, File, Link, Poll, Question, and Thanks. With the actions in the publisher setting enabled, you can include nonstandard actions in the Chatter publisher too. Nonstandard actions include Create, Update, Log a Call, custom actions, and Mobile Smart Actions.

In organizations created after the Winter '14 release, actions in the publisher is enabled automatically.

1. From Setup, enter *Chatter Settings* in the Quick Find box, then select **Chatter Settings**.
2. Click **Edit**.
3. Select Enable Actions in the Publisher.
4. Click **Save**.

Note: You don't need to enable actions in the publisher in order to use them in Salesforce1 or in third-party apps. See Actions with and without Chatter for more information.

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USER PERMISSIONS

To enable actions in the Chatter publisher:
- "Customize Application"

Enable Feed Updates for Related Records

Show feed updates on a record's detail page whenever someone creates related records. Feed updates for related records give users a complete view of the account activity.

1. From Setup, enter *Feed Tracking* in the Quick Find box, then select **Feed Tracking**.
2. Click the object for which you want to enable feed updates for related records.
3. Click **All Related Objects**.

   If you don't see this option, make sure that actions in the publisher are enabled. The All Related Objects option is available only on these objects:

   - Account
   - Campaign
   - Case
   - Contact
   - Custom objects
   - Group
   - Lead
   - Opportunity
4. Save your changes.

Example: If you enable feed updates for related records on accounts, the account feed includes:

- Feed updates for all activity on the account
- Updates for related tasks, events, and contacts

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USER PERMISSIONS

To change feed tracking settings

- "Customize Application"

Custom Quick Actions

Custom actions are Visualforce pages or canvas apps with functionality that you define. For example, you can create a custom action so that users can write comments that are longer than 5,000 characters, or create one that integrates a video-conferencing application so that support agents can communicate visually with customers.

Object-Specific Custom Actions

Object-specific custom actions are Visualforce pages or canvas apps that let users interact with or create records that have a relationship to an object record. The Visualforce page for an object-specific custom action must include the standard controller for the relevant object. For example, use the standard contact controller to create a custom action that lets users import a contact's Twitter profile and add that information to a contact record.

Global Custom Actions

Use a Visualforce page or a canvas app to create a global custom action for tasks that don't require users to interact with or create records that have a relationship to a specific object. Canvas apps that you want to use as custom actions require Publisher as a location. Visualforce pages that you want to use as global custom actions can't use standard controllers. For example, if you want a custom action that lets users enter a street address and see a map, the local time,

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and the local weather. For this action, create a Visualforce page that doesn't use any of the standard controllers, and add it as a custom global action.

Note: Chatter groups with customers don't support global create, log a call, or custom actions and display only standard Chatter actions, such as Post, File, Link, and Poll.

Visualforce Pages as Object-Specific Custom Actions

Visualforce pages added as custom actions on an object are invoked in the context of a record of that object type. The custom action has a specific record ID handed to it—the record the user was looking at when they clicked the custom action. Design the page to act on that specific record type.

Visualforce pages you create to use as object-specific actions must use a standard object controller. Use controller extensions to add custom code, including `@RemoteAction` methods you can call using JavaScript remoting.

Your custom code could do more than make updates to the originating record. For example, the Create Quick Order custom action searches for matching merchandise. It then creates an invoice and line item, all as part of creating an order for a part. That logic occurs in the context of the originating account record—the invoice is associated to the account record where the quick order action was invoked.

When the action completes, redirect the user to a page related to the originating record.

The following code sample shows a page designed to be used as a custom action on the account object, so it uses the standard Account controller. This action lets users create cases from account detail pages, and it has a different user interface from standard create actions.

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```
public with sharing class CreateCaseExtension {
    private final SObject parent;
    public Case theCase {get; set;}
    public String lastError {get; set;}

    public CreateCaseExtension2(ApexPages.StandardController controller) {
        parent = controller.getRecord();
        theCase = new Case();
        theCase.accountId = parent.id;
        lastError = '';
    }

    public PageReference createCase() {
        createNewCase();
        theCase = new Case();
        theCase.accountId = parent.id;
        return null;
    }

     private void createNewCase() {
        try {
            insert theCase;

            FeedItem post = new FeedItem();
            post.ParentId = ApexPages.currentPage().getParameters().get('id');
            post.Body = 'created a case';
            post.type = 'LinkPost';
```

```
            post.LinkUrl = '/' + theCase.id;
            post.Title = theCase.Subject;
            insert post;
        } catch(System.Exception ex){
           lastError = ex.getMessage();
        }
    }
}

<apex:page standardcontroller="Account" extensions="CreateCaseExtension" showHeader="false">

    <script type='text/javascript' src='/canvas/sdk/js/publisher.js'/>
    <style>
        .requiredInput .requiredBlock, .requiredBlock {background-color: white;}
        .custompubblock div {display: inline-block;}
        .custompublabel {width:54px;}
    </style>
    <script>
        function refreshFeed() {
            Sfdc.canvas.publisher.publish({name : 'publisher.refresh', payload :
{feed:true}});
        }
    </script>
    <div>
        <apex:form >
            <apex:actionFunction action="{!createCase}" name="createCase" rerender="out"

            oncomplete="refreshFeed();"/>
            <apex:outputPanel id="out" >
                <div class="custompubblock">
                    <div class="custompublabel">Account:</div><apex:inputField
value="{!theCase.accountId}"
                    style="margin-left:0;"/>   
                   <div>Contact: </div><apex:inputField value="{!theCase.contactId}"
 />
                </div>
                <apex:inputField value="{!theCase.description}"
style="width:538px;height:92px;margin-top:4px;" />
                <div class="custompubblock" style="margin-top:5px;">
                    <div>Status: </div><apex:inputField value="{!theCase.status}"
/>   
                   <div>Priority: </div><apex:inputField value="{!theCase.priority}"
 />   
                  <div>Case Origin: </div><apex:inputField value="{!theCase.origin}"
 />
                </div>
            </apex:outputPanel>
        </apex:form><br/>
        <button type="button" onclick="createCase();"
        style="position:fixed;bottom:0px;right:0px;padding:5px 10px;
        font-size:13px; font-weight:bold; line-height:
        18px;background-color:#0271BF;background-image:-moz-linear-gradient(#2DADDC,
#0271BF);background-repeat:repeat-x;border-color:#096EB3;"
        id="addcasebutton">Create Case</button>
```

```
    </div>
</apex:page>
```

Requirements for Refreshing Host Pages

If you want a custom action, whether object-specific or global, to refresh the feed on the page that hosts it, the Visualforce page you create to use as that action must:

- Reference the publisher JavaScript file: `<script type='text/javascript' src='/canvas/sdk/js/publisher.js'/>`. (Creating custom Visualforce actions doesn't require the Force.com Canvas SDK.)
- Include this JavaScript call: `Sfdc.canvas.publisher.publish({name : 'publisher.refresh', payload : {feed:true}});`.

Prerequisites for Using Canvas Apps as Custom Actions

Using canvas apps as custom actions makes it easy to give users access to the functionality of your apps in Chatter and elsewhere in Salesforce.

You can use as a custom action any canvas app that uses Publisher as a location. For example, you might use an expense report app as a custom action to make it easy for salespeople to submit expense reports directly from feeds. A custom action that includes a video conferencing canvas app could help support agents communicate with customers visually for easier troubleshooting of technical issues.

Before creating a custom action with a canvas app, be sure the app uses Publisher as a location, and be sure to give the users you want to be able to use the action access to the app.

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Custom canvas actions available in: **Professional** (with Force.com Canvas enabled), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Create Object-Specific Quick Actions

Object-specific actions let users create records that have automatic relationships to other records, make changes and updates to specific records, and interact with records in ways that you define.

1. From the management settings for the object for which you want to create an action, go to Buttons, Links, and Actions.
2. Click **New Action**.
3. Select the type of quick action you want to create.
4. Customize the action:
   - For a Create a Record action, select the type of object to create.
     - If the object has more than one record type, select the one you want to use for records created through this action.
     - If the object for which you're creating the action has more than one relationship with the target object, select the field you want to populate when a record is created. If the two objects have a master-detail relationship, you can't select which field to populate. The master-detail `Relationship` field is selected by default, and you can't change this setting.
   - For a Custom Action, select a Visualforce page to use, and then specify the height of the action window. (The width is fixed.)
5. Type a label for the action. Users see this label in the publisher menu.

   Tip: If you're creating a Create a Record or Log a Call action, you can choose an option from the `Standard Label Type` list to have Salesforce generate the label. In the labels in this list that include "Record" and "Record Type," Salesforce fills in the type of object or the record type the action creates. For example, if you choose the Create New "Record" standard label on a create contact action, the generated label is Create New Contact.
6. If necessary, change the name of the action.
   This name is used in the API and managed packages. It must begin with a letter and use only alphanumeric characters and underscores, and it can't end with an underscore or have two consecutive underscores. Unless you're familiar with working with the API, we suggest not editing this field.
7. Type a description for the action.
   The description appears on the detail page for the action and in the list on the Buttons, Links, and Actions page. The description isn't visible to your users. If you're creating several actions on the same object, we recommend using a detailed description, such as "Create Contact on Account using New Client record type."
8. Optionally, click **Change Icon** to select a different icon for the action.

   Custom images used for action icons must be less than 1 MB in size.
9. Click **Save**.

After you create a quick action, customize its layout, add predefined values, and then add the action to page layouts.

Note: If you delete an action, the action is removed from all layouts it's assigned to.

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USER PERMISSIONS

To create actions:
- "Customize Application"

Create Global Quick Actions

You can add global actions to any page that supports actions, like the Home page, the Chatter tab, and object pages. Global create actions enable users to create object records, but there's no automatic relationship between the record that's created and any other record.

USER PERMISSIONS

To create actions:
- "Customize Application"


Walk Through It: Create a Global Quick Action

Add Log a Call actions to global layouts to let users record call details from global pages, such as the Home page and the Chatter tab in the full Salesforce site, or the Feed or Groups pages in Salesforce1.

Use a Visualforce page or a canvas app to create a global custom action for tasks that don't require users to interact with or create records that have a relationship to a specific object.

Note: Chatter groups with customers don't support global create, log a call, or custom actions and display only standard Chatter actions, such as Post, File, Link, and Poll.

1. From Setup, enter *Actions* in the Quick Find box, then select **Global Actions**.
2. Click **New Action**.
3. Select the type of action that you want to create.
4. Customize the action.
   - For a Create a Record action, select the type of object to create. If the object has more than one record type, select the one you want to use for records created through this action.
   - For a Custom Action, select a Visualforce page or canvas app to use, and then specify the height of the action window. (The width is fixed.)
5. Type a label for the action. Users see this label in the publisher menu.

   Tip: If you're creating a Create a Record or Log a Call action, you can choose an option from the Standard Label Type list to have Salesforce generate the label. In the labels in this list that include "Record" and "Record Type," Salesforce fills in the type of object or the record type the action creates. For example, if you choose the Create New "Record" standard label on a create contact action, the generated label is Create New Contact.
6. If necessary, change the name of the action.
   This name is used in the API and managed packages. It must begin with a letter and use only alphanumeric characters and underscores, and it can't end with an underscore or have two consecutive underscores. Unless you're familiar with working with the API, we suggest not editing this field.
7. Type a description for the action.
   The description appears on the detail page for the action and in the list on the Buttons, Links, and Actions page. The description isn't visible to your users. If you're creating several actions on the same object, we recommend using a detailed description, such as "Create Contact on Account using New Client record type."
8. Optionally, click **Change Icon** to select a different icon for the action.

   Custom images used for action icons must be less than 1 MB in size.
9. Click **Save**.

After you create a quick action, customize its layout, add predefined values, and then add the action to page layouts.

Tip: If you delete an action, the action is removed from all layouts it's assigned to.

Customize Actions with the Action Layout Editor

When you create an action, Salesforce populates its layout with a default set of fields. Use the action layout editor to add, remove, or reorder fields on an action layout.

The action layout editor opens automatically when you're creating an action. To view and edit the layouts for existing global actions in Setup, enter *Actions* in the Quick Find box, then select **Global Actions** and then click **Layout** next to the action's name. To view and edit the layouts for object-specific actions, from the management settings for the action's object, go to Buttons, Links, and Actions.

The first time you view the layout for an action you've created, certain fields are prepopulated: target object default fields, standard required fields, and any custom universally required fields. Default actions (available in organizations created after Winter '14) have predefined sets of fields.

- To add a field to the action layout, select and drag the field from the palette to the layout.

  Tip: There is no hard limit to the number of fields you can add to an action layout. However, for optimum usability, we recommend a maximum of 8 fields. Adding more than 20 fields can severely impact user efficiency. To reduce the number of fields in your layout, you can create predefined values for the required fields, and then remove those fields from your layout. You can set predefined field values from the action detail page.

  Mobile smart actions are populated with all your organization's required fields on the relevant object, regardless of how many fields there are. For example, the New Case action in the mobile smart action bundle includes all required case fields. You can't edit the fields on mobile smart actions. The fields that appear change only if you change which fields on an object are required.

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USER PERMISSIONS

To customize page layouts:
- "Customize Application"

To view page layouts:
- "View Setup"

- To remove a field from the action layout, drag the field from the action layout to the right side of the palette. You can also hover over the field and click ⊖.

  You can remove a required field from the action layout, but make sure that the field has a predefined value. Otherwise, users can't create records.
- In Enterprise, Unlimited, Performance, and Developer Editions, click **Preview As** to preview the action layout as different types of users.
- To make a field read-only or required for the action, either double-click the field in the action layout or hover over the field and click 🔧. You can't change the properties of fields from the palette.
- To save your changes and continue editing the action layout, click **Quick Save**.
- To save your changes when you are done customizing the action layout, click **Save**. If you navigate away from your action layout before clicking **Save**, you lose your changes.

SEE ALSO:

Salesforce Help: Find Object Management Settings

Set Predefined Field Values for Quick Action Fields

When you create actions, use predefined field values to set a value for a field. Predefined values can help ensure consistency and make it faster and easier for users to create records.

When you configure action layouts, it's better to use fewer fields. Most users, especially mobile users, don't like to fill in a lot of required fields. They want to get things done and move on to their next task. A good way to use fewer fields in action layouts is to set predefined values for as many fields as possible. The more fields you can set predefined values for, the more you can remove from the layout and make the action easier and quicker to use. Balance ease of use with the need for required information. However, don't remove required fields from an action layout without setting a predefined value for those fields, or when a user applies that action, the record won't save properly.

If you set predefined values for fields on object records created through an action, you don't need to add those fields to the action layout. For example, when you configure an action that lets users create opportunities, set Prospecting as the predefined value for the `Stage` field. All new opportunities users create through that action are automatically assigned to the prospecting stage. You can remove the `Stage` field from the action's layout, because the field is going to be assigned a value automatically.

Tip: Predefined values for fields on actions are different from default values that you can set for fields on records. If a field is included in an action, it can have both a predefined value set for the action *and* a default value set.

To set predefined field values:

1. Click the name of an action in the Buttons, Links, and Actions list or the Global Actions list.
2. On the action detail page, click **New** in the Predefined Field Values list.
3. Select the field you want to predefine a value for.
4. Specify the value for the field.
5. Click **Save**.

Tip: On object-specific actions, the predefined value can include references to the source object and its related objects.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:
- Group
- Professional
- Enterprise
- Performance
- Unlimited
- Contact Manager
- Database.com
- Developer

USER PERMISSIONS

To set predefined field values:
- "Customize Applications"

Notes on Predefined Field Values for Quick Actions

Setting predefined field values for quick actions is especially important if you remove required or `Always on Layout` fields from the action layout.

- You can set predefined values for any field available in the action layout editor, with these exceptions.
  - Rich text area fields
  - Multi-select picklists
  - Read-only field types like auto-number, formula, and roll-up summary fields
- If a field on an action has both a predefined value and a default value set, the action uses the predefined value, not the default value.
- If you set a predefined value for a field and leave it on the action layout, the predefined value displays as a default value for the field.

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- If you have a required field with a predefined value assigned, and have removed the field from the action layout, if you later delete the field's predefined value you will need to re-add the required field to the action layout. Otherwise, users won't be able to save the record.

Customize Actions with the Enhanced Page Layout Editor

Use the page layout editor to customize which actions show up in Salesforce and in Salesforce1.

Tip: To manage the actions for global pages, such as Home, Chatter Home, and Chatter groups, see Global Publisher Layouts.

From the management settings for the object whose actions you want to manage, go to Page Layouts.

You can add actions to two sections on a page layout:

Quick Actions in the Salesforce Classic Publisher
This section can contain actions only from the Quick Actions category in the palette. Actions in this section appear in the Chatter publisher in the full Salesforce site.

Salesforce1 and Lightning Experience Actions
This section can contain actions only from the Salesforce1 Actions category in the palette. On object page layouts, the Salesforce1 Actions category contains all available types of actions for the object, including quick actions, productivity actions, and standard and custom buttons. Actions in this section appear in the action bar and action menu in Salesforce1 and in various areas of Lightning Experience.

Tip: Hover over an action in the palette to see its label, API name, and action type.

- To override the action defaults for an action section that you haven't customized, either click the override text or hover over the section and click .

  If you haven't customized the Quick Actions in the Salesforce Classic Publisher section of a page layout, the actions that appear in the publisher for that object default to the actions that are assigned to the global publisher layout. Upon overriding, the actions default to the standard actions—Post, File, Link, Poll, Question, and Thanks—regardless of what actions were assigned to the global publisher layout.

  If you haven't customized the Salesforce1 and Lightning Experience Actions section of a page layout, the actions for that object default to a set of predefined actions. If you have customized actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, the Salesforce1 and Lightning Experience Actions section inherits the actions from the Quick Actions in the Salesforce Classic Publisher section when you click to override.

- To revert the actions in either section to the defaults for that section, hover over the section and click .

SEE ALSO:

Salesforce Help: Find Object Management Settings

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:
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- Enterprise
- Performance
- Unlimited
- Contact Manager
- Database.com
- Developer

USER PERMISSIONS

To create actions:
- "Customize Application"

To customize action layouts and page layouts:
- "Customize Application"

To view page layouts:
- "View Setup"

GLOBAL PUBLISHER LAYOUTS

Use global publisher layouts to customize actions that appear on Chatter publishers for global pages such as the Home page and the Chatter page. Global publisher layouts also drive the actions that users see in the action bar and action menu on the Feed and People pages in Salesforce1. Global publisher layouts can be composed only from global actions.

In Salesforce for Outlook, global publisher layouts drive the actions that Group, Contact Manager, and Professional Edition users see when they click the Salesforce Side Panel Publisher. Salesforce for Outlook users working in all other editions can set up their side panel publishers using Outlook Side Panel Publisher Layouts.

Note: Chatter groups without customers display the global publisher layout by default, unless you override it with a customized group publisher layout. In Chatter groups that allow customers, the publisher displays standard actions only, such as Post, File, Link, and Poll.

After creating global publisher layouts, you can assign them to different user profiles to customize which actions users see by default on global pages.

These are the steps involved in working with global publisher layouts.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Group
- Professional
- Enterprise
- Performance
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- Contact Manager
- Database.com
- Developer

USER PERMISSIONS

To create actions:

- "Customize Application"

To customize action layouts and page layouts:

- "Customize Application"

To view page layouts:

- "View Setup"

Create Global Publisher Layouts

Use global publisher layouts to customize the Chatter publisher on global pages such as the Home page and the Chatter page. These publisher layouts also drive the actions that users see in the action bar and action menu on the Feed and People pages in Salesforce1.

1. From Setup, enter *Publisher Layouts* in the Quick Find box, then select **Publisher Layouts**.
2. To create a new global publisher layout, click **New**.
3. To clone a publisher layout, select one from the Existing Global Publisher Layout drop-down list.
4. Enter a name for the new global publisher layout.
5. Click **Save**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:
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USER PERMISSIONS

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To customize action layouts and page layouts:
- "Customize Application"

To view page layouts:
- "View Setup"

Add Actions to Global Publisher Layouts

Actions you add to the global publisher layouts appear on pages such as the Home and Chatter pages, and the action bar and action menu on the Feed and People pages in Salesforce1.

Arrange the actions so that the frequently used actions appear first in each list. All other actions appear in the publisher drop-down menu.

Walk Through It: Customizing Global Publisher Layouts

You can add actions to two sections on a page layout:

Quick Actions in the Salesforce Classic Publisher

This section can contain actions only from the Quick Actions category in the palette. Actions in this section appear in the Chatter publisher in the full Salesforce site.

Salesforce1 and Lightning Experience Actions

This section can contain actions only from the Salesforce1 Actions category in the palette. On object page layouts, the Salesforce1 Actions category contains all available types of actions for the object, including quick actions, productivity actions, and standard and custom buttons. Actions in this section appear in the action bar and action menu in Salesforce1 and in various areas of Lightning Experience.

1. From Setup, enter *Publisher Layouts* in the Quick Find box, then select **Publisher Layouts**.
2. To add or remove actions, drag them to and from the palette. To reorder actions, select an action and drag it to a new position.

   In the Quick Actions in the Salesforce Classic Publisher section, the first three actions on the left appear in the Chatter publisher. All other actions appear in the More drop-down menu.
3. Click **Save** when you're done, or click **Quick Save** to save your changes and continue working on the layout.

   If you navigate away without saving, you lose your changes.

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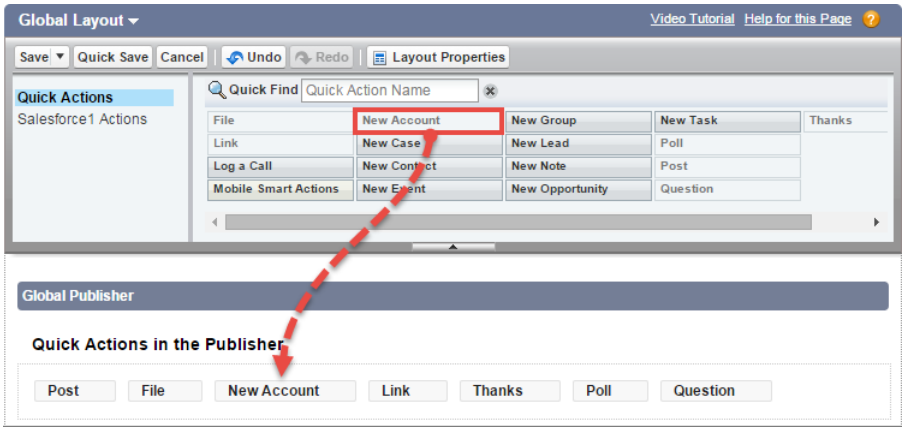
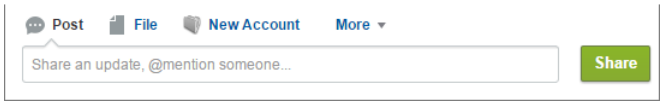
To view page layouts:
- "View Setup"

Example: Let's add the New Account action to the publisher, so users can create an account directly from the publisher. Just drag the New Account action to the Quick Actions in the Publisher section and save your changes.



Go to the Chatter tab. Now the New Account action shows up in the publisher.



Assign Global Publisher Layouts to User Profiles

Once you finish creating a global publisher layout, you can assign it to different user profiles.

For example, a Marketing User and a Standard User might need different actions in the Chatter publisher or in Salesforce1. Create multiple global publisher layouts and assign them to different user profiles to customize the actions for each profile.

1. From Setup, enter *Publisher Layouts* in the Quick Find box, then select **Publisher Layouts**.
2. Click **Publisher Layout Assignment**.
3. Click **Edit Assignment**.
4. Select a user profile by clicking anywhere on its row in the table.

   You can assign a global publisher layout to multiple profiles by using SHIFT+click to select adjacent profiles and CTRL+click to select non-adjacent profiles.
5. From the Publisher Layout to Use drop-down, select the global publisher layout that you want to assign to the highlighted profile.
6. Click **Save**.

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USER PERMISSIONS

To create actions:

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To customize action layouts and page layouts:

- "Customize Application"

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QUICK ACTIONS AND RECORD TYPES

Using record types in your organization can affect the availability of quick actions for your users.

If users don't have access to a particular record type, actions that are assigned to that record type aren't available to them. For example, let's say that you have a page layout that contains a mix of actions—some have no record type assigned and some are assigned to Record Type A. Users without access to Record Type A see only the nonassigned actions when they visit the page.

Important: Don't assign actions to the Master record type. The Master record type is a placeholder record type that's assigned when your organization is created.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Quick actions available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Contact Manager**, **Database.com**, and **Developer** Editions

Custom canvas actions available in: **Professional** (with Force.com Canvas enabled), **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Default Global Actions: A Special Case

If you have default global actions in your organization and you're using record types, your users might not be able to see all the default actions that are assigned to a page layout.

Default global actions are assigned to the Master record type, which isn't accessible to most profiles. As a result, default global actions with the Master record type that are associated with target objects that have record types configured aren't available for most users. To fix this issue, edit the default global actions associated with those objects and reassign them to a different record type.

For example, the New Contact default global action has Contact as its target object. Let's say you have record types set up for the Contact object, and you add the New Contact default global object to a page layout. Users who visit records based on that page layout don't see the New Contact action because the action is assigned to the Master record type by default. Editing the New Contact default global action and assigning it to a record type other than Master makes it available for all users who have access to its assigned record type.

ACTIONS BEST PRACTICES

Use these tips as you set up actions to make the feature easy to use and easy to maintain.

EDITIONS

Actions available in: both Salesforce Classic and Lightning Experience

Publisher available in: Salesforce Classic

Available in:

- Group
- Professional
- Enterprise
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Tips for Creating Actions

- Action labels longer than approximately 12–14 characters are shortened when they're displayed in the Chatter publisher. Keep names short and descriptive.
- Give your actions task-oriented names that tell your users what they do. Use terms such as New, Create, Share, Update, or Import.
- Use the `Description` field to create notes for yourself about each action. Notes are especially useful if you're creating several similar actions for different record types, for example. The description appears in the list of buttons, links, and actions for object-specific actions, or in the list of global actions, as well as on the detail page for the action. Your notes aren't visible to users.
- When creating custom actions that are going to be displayed in the Chatter publisher, limit their height to 400 pixels so that they are displayed correctly.

Tips for Laying Out Actions

- When customizing action layouts, consider what your users will do with them. Minimalism is key. Include only the fields that are necessary for them and for whomever handles the cases, calls, or records that result from those actions.
- To create a single-column layout, such as for display on mobile devices, add fields only in the left column.
- Use predefined field values to set standard values for common fields. For example, when you configure an action that lets users create opportunities, set Prospecting as the predefined value for the `Stage` field. All new opportunities users create through that action are automatically assigned to the prospecting stage. You can remove the `Stage` field from the action's layout, because the field is going to be assigned a value automatically. If you set predefined values for fields on object records created through an action, you don't need to add those fields to the action layout.
- Use the **Preview As...** button on the Action Layout Editor to see how an action layout appears to different user profiles.

Tips for Adding Actions to Publishers

- Because adding too many actions can cause the page to load slowly, we recommend including no more than nine actions total in each publisher, including any standard actions.
- In the full Salesforce site, if you include five or more actions in a publisher, three are shown and the rest are added to the publisher's **More** menu. If you include four or fewer actions, they're all shown.
- In Salesforce1, the first four actions show up in the action bar, and the full set of actions are accessed by tapping .

TROUBLESHOOTING ACTIONS

I don't see feeds on record detail pages for a certain object.

Feeds appear only for objects for which you've enabled feed tracking.

I see the feed on a record detail page, but I don't see a publisher.

If there are no actions in the Quick Actions in the Salesforce Classic Publisher section on a page layout, the publisher in Salesforce Classic doesn't appear. Add at least one action to the page layout for the publisher to appear.

I can create actions, but I can't add them to publishers.

Enable actions in the publisher to add nonstandard actions to publishers in Salesforce Classic.

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I'm using Internet Explorer 10 and all the actions I've created appear in the publisher with the same icon, even though the actions are for different types of objects.

Internet Explorer version 10 doesn't support the techniques Salesforce uses to show icons that correspond to the type of object an action is associated with. Consider using Chrome, Firefox, Safari, or an earlier version of Internet Explorer.

I've added an action to a page layout, but a user assigned to the profile that uses that page layout can't see the action.

Be sure that the user has both Read and Edit permissions on the action's relationship field. The relationship field is the field that's automatically populated on the target object when a user creates a record using an action. For example, for an action on case that lets users create child cases, the default relationship field is `Parent Case`. To be sure users can see the Create Child Case action, check that they have both Read and Edit permissions on the `Parent Case` field.

I don't see a relationship field on my global create actions.

Relationship fields apply only to object-specific create actions, not to global actions.

I don't see some of the actions in my Chatter groups.

Which actions you see depends on your role in the group, the type of group, and how your administrator has configured the publisher layout for groups. Chatter groups without customers display the global publisher layout by default, unless you override it with a customized group publisher layout. In Chatter groups that allow customers, the publisher displays standard actions only, such as Post, File, Link, and Poll.