

Force.com Actions Developer Guide

Developer Guide

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CHAPTER 1 Introducing Actions

Use actions to add more functionality to your applications. Choose from standard actions, such as posting to Chatter or sending email, or create actions based on your company's needs.

For example, you can:

- Add features and functionality to your existing Force.com tools.
- Build dynamic modules for Force.com development into your enterprise integration tools.
- Build specialized development tools for a specific application or service.

You can batch actions to improve performance in API version 35.0 and later.

Overview

Actions allow you to build custom development tools for Force.com applications.

Actions are about "getting things done" in Salesforce. They encapsulate a piece of logic that allows a user to perform some work, such as sending email. When an action runs, it saves changes in your organization by updating the database.

Actions are easy to discover and use, and also easy to understand and implement. Every button and link in Salesforce can be considered an action. A consistent Actions API and framework support the creation and distributed use of actions throughout Salesforce. Actions are available in the REST API.

The types of actions are:

Туре	Description
InvocableAction	Invocable actions, also known as dynamic actions, can be invoked from a common endpoint in the REST API. They provide "describe" support – a programmatic mechanism to learn about all invocable actions on the platform.
	There are two types of invocable actions.
	Standard action A standard action is ready to use right away. The work it performs is predefined, along with its inputs and outputs, and they're available in every organization.
	Custom action You create custom actions because these actions require a definition. For example, to use an Apex action, create the Apex class method for the action.
QuickAction	Quick Actions, formerly known as Publisher Actions, use page layouts to make it easy for administrators to configure an action to create or update a record. The API always works with an sObject.
StandardButton	Standard buttons are URLs allowing users to either go to another page (for example, the Edit page) or accomplish some task (for example, lead conversion).

Introducing Actions Invoking Actions

Туре	Description
CustomButton	Custom buttons are URLs that an administrator can specify and when included on a page and clicked,
	will redirect a user to that URL.

To call an action from a flow, use FlowActionCall, as described in the Metadata API Developer's Guide.

The If-Modified-Since header can be used with actions, with a date format of EEE, dd MMM yyyy HH:mm:ss z. When this header is used, if the action metadata has not changed since the provided date, a 304 Not Modified status code is returned, with no response body.

Invoking Actions

All actions are invoked using the same JSON body format. The top-level JSON key name must be inputs.

The following example request shows two Chatter posts made with a single Post to Chatter action.

Here is the response.

```
[ {
  "actionName" : "chatterPost",
  "errors" : null,
  "isSuccess" : true,
  "outputValues" : {
      "feedItemId" : "0D5D0000000kynqKBA"
  }
}, {
  "actionName" : "chatterPost",
  "errors" : null,
  "isSuccess" : true,
  "outputValues" : {
      "feedItemId" : "0D5D0000000kynrKBz"
  }
} ]
```

Standard actions return their name in actionName. The value of actionName varies for custom actions.

Introducing Actions Available Actions

Action	actionName value
Flow	The flow name
Apex	The class's invocable method name
Quick action	<pre><object name="">.<quick action="" name=""> For a global quick action, there's no <object name="">. prefix.</object></quick></object></pre>
Email alert	<object name="">.<email alert="" name=""></email></object>

Available Actions

The following actions are available.

Action	Description
Apex Actions	Invoke Apex methods annotated with @InvocableMethod and include custom parameters with @InvocableVariable.
Email Alert	Send emails from flows by reusing already-configured workflow email alerts.
Flow	Invoke an active autolaunched flow or active invocable process that exists in the current org.
PlatformAction	PlatformAction is a virtual read-only object. It enables you to query for actions displayed in the UI, given a user, a context, device format, and a record ID. Examples include standard and custom buttons, quick actions, and productivity actions.
Post to Chatter Actions	Posts a message to a specified feed, such as to a Chatter group or a case record. The message can contain mentions and topics, but only text posts are supported.
Quick Actions	Use a quick action to create a task or a case. Invoke existing quick actions, both global and object-specific, to create records, update records, or log calls.
Refresh Metric	Update a metric's Current Value field if it's linked to a summary field in a Salesforce report. The refresh runs as the metric owner.
Simple Email	Send an email where you specify the subject, body, and recipients.
Submit for Approval	Submit a Salesforce record for approval if an approval process is defined for the current entity.

CHAPTER 2 Action Objects

This is the reference for quick actions and dynamic actions. Invocable actions are also known as dynamic actions.

Apex Actions

Invoke Apex methods annotated with @InvocableMethod and include custom parameters with @InvocableVariable. This object is available in API version 33.0 and later.

Supported REST HTTP Methods

URI

Get a list of available Apex actions:

/vXX.X/actions/custom/apex

Get information about a specific Apex action:

/vXX.X/actions/custom/apex/action name

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

```
Authorization: Bearer token
```

Parameters

None

Example

This example invokes the Apex action called ActionTest, which takes a list of IDs and returns a list of associated account names. The top-level key name in the JSON request body must be inputs.

Action Objects Apex Actions

```
"ids":"001d000001tYHulAAG"
}
]
```

Here is the Apex code:

```
public class ActionTest {
  @InvocableMethod(label='Action Test' description='Given a list of Account IDs, return a list of Account names.')

public static List<String> getAccountNames(List<ID> ids) {
    List<String> accountNames = new List<String>();
    Account a = new Account();

    for (ID id : ids) {
        a = [SELECT Name FROM Account WHERE Id = :id];
        accountNames.add(a.Name);
    }

    return accountNames;
}
```

Note: The resource is the name of the Apex class, not the Apex method. In this example, the resource is /ActionTest, not /getAccountNames.

Notes

- Describe and invoke for an Apex action respect the profile access for the Apex class. If you don't have access, an error is issued.
- If you add an Apex action to a flow, and then remove the @InvocableMethod annotation from the Apex class, you get a run-time error in the flow.
- If an Apex action is used in a flow, packageable components that reference these elements aren't automatically included in the package. For example, if you use an email alert, you must manually add the email template that is used by that email alert. To deploy the package successfully, manually add those referenced components to the package.
- An Apex invocable action can be declared public or global in a managed package. However, that action doesn't appear in the Cloud Flow Designer's list of available actions while building or editing a flow. These invocable actions can still be referred to by flows within the same managed package. Global Apex invocable actions in a managed package can be used in flows outside the managed package, anywhere in the organization, and appear in the Cloud Flow Designer's list of available actions to add to a flow.

Inputs

Supply input values that correspond to the Apex action.

- A POST request body must use the JSON format specified in Invoking Actions.
- Apex methods annotated with @InvocableMethod must take a List as an input and return a List or Null. For more information, see @InvocableMethod Annotation in the Apex Developer Guide.
- Only the following primitive types are supported as inputs in a POST request body:
 - Blob

Action Objects Email Alert Actions

- Boolean
- Date
- Datetime
- Decimal
- Double
- ID
- Integer
- Long
- String
- Time

For more information, see the @InvocableMethod and @InvocableVariable annotations in the Apex Developer Guide.

Outputs

The Apex InvocableMethod determines the output values.

Email Alert Actions

Send emails from flows by reusing already-configured workflow email alerts.

The email alert is already configured with the email's contents, recipients, and sender, so the flow only needs to provide the record ID. Email alerts are entity-specific. For more information about creating email alerts, see Creating Email Alerts for Workflow, Approvals, or Milestones in the Salesforce Help.

This object is available in API version 32.0 and later.

Supported REST HTTP Methods

URI

Get a list of available email alert actions:

/vXX.X/actions/custom/emailAlert

Get information about a specific email alert action:

/vXX.X/actions/custom/emailAlert/entity_name/action_name

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Action Objects Flow Actions

Inputs

The email alert action uses the record specified by SObjectRowId to get the information it needs. For example, if a Case was specified for the action, the action could retrieve the email address and recipient's name from the Case object's SuppliedEmail and SuppliedName fields, respectively.

Input	Details
SObjectRowId	Type □
	Description Required. The ID of a record such as an Account.

Outputs

None.

Flow Actions

Invoke an active autolaunched flow or active invocable process that exists in the current org.

For more information about creating flows and processes, see Creating a Flow and Create a Process in the Salesforce online help.

This object is available for autolaunched flows in API version 32.0 and later. This object is available for invocable processes in API version 38.0 and later.

Supported REST HTTP Methods

URI

Get a list of available flow actions:

/vXX.X/actions/custom/flow

Invokes the LargeOrder flow:

/vXX.X/actions/custom/flow/LargeOrder

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Inputs

Input values vary according to the input variables specified for each flow. For autolaunched flows, the input values vary according to the input variables in that flow.

Invocable processes always require either one of the following input parameters:

• sObjectId: The Id of the sObject record that you want the process to execute on. The record must be of the same object type as the one on which the process is defined.

• sObject: The sObject itself that you want the process to execute on. The sObject must be of the same object type as the one on which the process is defined.

Outputs

Output values vary according to the output variables specified. Flow__InterviewStatus is available for flows. Invocable processes do not have outputs.

Output	Details
FlowInterviewStatus	Type picklist
	Description The current status of the flow interview. Valid values are:
	• Created
	• Started
	 Finished
	• Error
	Waiting

PlatformAction

PlatformAction is a virtual read-only object. It enables you to query for actions displayed in the UI, given a user, a context, device format, and a record ID. Examples include standard and custom buttons, quick actions, and productivity actions.

Supported Calls

query()

Fields

Field	Details
ActionListContext	Type string
	Properties Filter, Group, Nillable, Restricted picklist, Sort
	DescriptionRequired. The list context this action applies to. Valid values are:Assistant

Field Details

BannerPhoto

- Chatter
- Dockable
- FeedElement
- FlexiPage
- Global
- ListView
- ListViewDefinition
- ListViewRecord
- Lookup
- MruList
- MruRow
- ObjectHomeChart
- Photo
- Record
- RecordEdit
- RelatedList
- RelatedListRecord

ActionTarget

Type

string

Properties

Nillable

Description

The URL to invoke or describe the action when the action is invoked. If the action is a standard button overridden by a Visualforce page, the ActionTarget returns the URL of the Visualforce page, such as /apex/pagename.

This field is available in API version 35.0 and later.

ActionTargetType

Type

string

Properties

Filter, Group, Nillable, Restricted picklist, Sort

Description

The type of the target when this action is triggered. Valid values are:

- Describe—applies to actions with a user interface, such as quick actions
- Invoke—applies to actions with no user interface, such as action links or invocable actions
- Visualforce—applies to standard buttons overridden by a Visualforce page

Field	Details
ActionTargetUrl	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	URL to invoke or describe the action when the action is invoked. This field is deprecated in API version 35.0 and later. Use ActionTarget instead.
Category	Туре
	string
	Properties
	Filter, Group, Nillable, Restricted picklist, Sort
	Description
	Applies only to action links. Denotes whether the action link shows up in the feed item list of actions or the overflow list of actions. Valid values are:
	• Primary
	• Overflow
ConfirmationMessage	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	Applies only to action links. The message to display before the action is invoked. Field is null if no confirmation is required before invoking the action.
DeviceFormat	Туре
	string
	Properties
	Defaulted on create, Filter, Group, Nillable, Restricted picklist, Sort
	Description
	Specifies which action icon the PlatformAction query returns. If this field isn't specified, it defaults to Phone. Valid values are:
	• Aloha
	• Desktop
	• Phone
	• Tablet
ExternalId	Туре
	string

Field	Details
	Properties Filter, Group, Nillable, Sort
	Description The unique ID for the PlatformAction. If the action doesn't have an ID, its API name is used.
GroupId	Type ID
	Properties Filter, Group, Nillable, Sort
	Description The unique ID of a group of action links.
IconContentType	Type string
	Properties Filter, Group, Nillable, Sort
	Description The content type—such as .jpg, .gif, or .png—of the icon for this action. Applies to both custom and standard icons assigned to actions.
IconHeight	Type int
	Properties Filter, Group, Nillable, Sort
	Description The height of the icon for this action. Applies only to standard icons.
IconUrl	Type string
	Properties Filter, Group, Nillable, Sort
	Description The URL of the icon for this action.
IconWidth	Type int
	Properties Filter, Group, Nillable, Sort
	Description The width of the icon for this action. Applies only to standard icons.

Field	Details	
InvocationStatus	Туре	
	string Properties Filter, Group, Nillable, Restricted picklist, Sort	
	Description	
	The status of the action within the feed item. Applies to action links only. Valid values are:	
	• Failed	
	• New	
	• Pending	
	• Successful	
InvokedByUserId	Туре	
	ID	
	Properties	
	Filter, Group, Nillable, Sort	
	Description	
	The ID of the user who most recently invoked this action within the current feed item. Applies to action links only.	
IsGroupDefault	Туре	
	boolean	
	Properties	
	Filter, Group, Sort	
	Description	
	Denotes whether this action is the default in an action link group. False for other action types. Applies to action links only.	
IsMassAction	Туре	
	boolean	
	Properties Defaulted on create, Filter, Group, Sort	
	Description	
	Indicates whether the action can be performed on multiple records.	
	This field is available in API version 38.0 and later.	
Label	Туре	
	string	
	Properties	
	Filter, Group, Sort	
	Description	
	The label to display for this action.	

Field	Details
PrimaryColor	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	The primary color of the icon for this action.
RelatedListRecordId	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description
	Represents the ID of a record in an object's related list.
	This field is available in API version 38.0 and later.
RelatedSourceEntity	Туре
	string
	Properties
	Filter, Group, Nillable, Sort
	Description When the ActionListContext is RelatedList or RelatedListRecord, this field represents the API name of the related list to which the action belongs.
Section	Туре
	string
	Properties
	Filter, Group, Nillable, Restricted picklist, Sort
	Description The section of the user interface the action resides in. Applicable only to Lightning Experience. Valid values are:
	ActivityComposer
	 CollaborateComposer
	 NotesComposer
	• Page
	SingleActionLinks
	This field is available in API version 35.0 and later.
SourceEntity	Туре
	string
	Properties
	Filter, Group, Sort

Field	Details
	Description Required. The object or record with which this action is associated.
Subtype	Type string
	Properties Filter, Group, Nillable, Sort
	Description The subtype of the action. For quick actions, the subtype is QuickActionType. For custom buttons, the subtype is WebLinkTypeEnum. For action links, subtypes are Api, ApiAsync, Download, and Ui. Standard buttons and productivity actions have no subtype.
Type	Type string
	Properties Filter, Group, Restricted picklist, Sort
	Description The type of the action. Valid values are:
	 ActionLink—An indicator on a feed element that targets an API, a web page, or a file, represented by a button in the Salesforce Chatter feed UI.
	 CustomButton—When clicked, opens a URL or a Visualforce page in a window or executes JavaScript.
	• InvocableAction
	 ProductivityAction—Productivity actions are predefined by Salesforce and are attached to a limited set of objects. You can't edit or delete productivity actions.
	 QuickAction—A global or object-specific action.
	 StandardButton—A predefined Salesforce button such as New, Edit, and Delete.

Usage

PlatformAction can be described using describeSObject().

You can directly query for PlatformAction. For example, this query returns all fields for actions associated with each of the records of the listed objects:

Action Objects Post to Chatter Actions



Note: To query PlatformAction, provide the ActionListContext and SourceEntity. If you query for ActionListContext with a value of RelatedList, and don't specify a RelatedSourceEntity, the query returns the API name of the related list.

This query uses multiple ActionListContext values in its WHERE clause to return all actions in the Lightning Experience user interface (DeviceFormat = 'Desktop') for the specified object:

```
SELECT ActionListContext, Label, Type, Subtype, Section, SourceEntity,
    RelatedSourceEntity, ActionTarget, ActionTargetType, ApiName, Category,
    ConfirmationMessage, DeviceFormat, ExternalId, GroupId, IconContentType,
    IconHeight, IconUrl, IconWidth, Id, InvocationStatus, InvokedByUserId,
    IsGroupDefault, LastModifiedDate, PrimaryColor
FROM PlatformAction
WHERE ActionListContext IN ('Record', 'Chatter', 'RelatedList') AND
      SourceEntity = '001xx000003DlvX' AND
      DeviceFormat = 'Desktop'
```

Post to Chatter Actions

Post to the feed for a specific record, user, or Chatter group.

Use a Post to Chatter action to post a message at run time to a specified feed. Post to Chatter supports @mentions and topics, but only text posts are supported.

This object is available in API version 32.0 and later.

Supported REST HTTP Methods

URI

Get a list of available post to Chatter actions:

/vXX.X/actions/standard/chatterPost

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Inputs

Input	Details
communityId	Type reference
	Description Optional. Specifies the ID of a community to post to. Valid only if Salesforce Communities is enabled. Required if posting to a user or Chatter group that belongs to a Salesforce.com
	Community. This value is available in API version 35.0 and later.

Action Objects Post to Chatter Actions

Input	Details
subjectNameOrId	Туре
	string
	Description
	Required. Reference to the user, Chatter group, or record whose feed you want to post to.
	 To post to a user's feed, enter the user's ID or Username. For example: jsmith@salesforce.com
	 To post to a Chatter group, enter the group's Name or ID. For example: Entire Organization
	• To post to a record, enter the record's ID. For example: 001D00000JWBDx
text	Type string
	Description
	Required. The text that you want to post. Must be a string of no more than 10,000 characters
	To mention a user or group, enter @[reference], where reference is the ID for the u or group that you want to mention. The reference can be a literal value, a merge field, or a floresource.
	To add a topic, enter #[string], where string is the topic that you want to add.
	For example, the string Hi @[0050000000000] check this out #[some_topic]. is stored appropriately as Hi @Joe, check this out #some_topic. where "@Joe" and "#some_topic" are links to the user and topic, respective
type	Туре
	picklist
	Description Required only if subjectNameOrId is set to a user name or a Chatter group name. The ty of feed that you want to post to.
	 User—Enter this value if subjectNameOrId is set to a user's Username.
	• Group—Enter this value if subjectNameOrId is set to a Chatter group's Name.
visibility	Type picklist
	Description
	Optional. Valid only if Salesforce Communities is enabled. Specifies whether this feed item is available to all users or internal users only. Valid values are:
	• allUsers
	• internalUsers
	This value is available in API version 35.0 and later.

Action Objects Quick Actions

Outputs

Output	Details
feedItemId	Type reference
	Description The ID of the new Chatter feed item.

Quick Actions

Use a quick action to create a task or a case. Invoke existing quick actions, both global and object-specific, to create records, update records, or log calls.

For more information about creating global quick actions, see Create Global Quick Actions, and for more information on object-specific quick actions, see Create Object-Specific Quick Actions, in the Salesforce online help.

This object is available in API version 32.0 and later.

Supported REST HTTP Methods

URI

Get a list of quick actions:

/vXX.X/actions/custom/quickAction

Get a specific quick action:

/vXX.X/actions/custom/quickAction/quick action name

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Notes

The only type of quick actions that can be invoked are create, update, and logACall.

Inputs

All quick actions have the contextId input parameter. It's a reference to the related record for the quick action. Other inputs vary according to the layout of the quick action. To determine inputs for a specific quick action, use the describe feature. For example, perform a GET with /services/data/vXX.X/actions/custom/quickAction/Task/deferTask to see the inputs for the quick action deferTask.

Action Objects Refresh Metric Actions

Refresh Metric Actions

Update a metric's Current Value field if it's linked to a summary field in a Salesforce report. The refresh runs as the metric owner.

This object is available in API version 34.0 and later.

Supported REST HTTP Methods

URI

Get a list of metric refresh actions:

/vXX.X/actions/standard/metricRefresh

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Inputs

Input	Details
metricId	Type string
	Description Required. The metric linked to a Salesforce report.

Outputs

Output	Details
resultingMessage	Type string
	Description The message that indicates the results of the metric refresh.

Simple Email Actions

Send an email where you specify the subject, body, and recipients.

This object is available in API version 32.0 and later.

Action Objects Simple Email Actions

Supported REST HTTP Methods

URI

Get a list of available simple email actions:

/vXX.X/actions/standard/emailSimple

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Inputs

Input	Details
emailAddresses	Туре
	string
	Description
	Required if emailAddressArray isn't used. The email recipients specified as a comma-separated list. The number of email recipients must be five or less. If
	$\verb emailAddressArray is also used, the combined number of recipients must be five or less.$
emailAddressesArray	Туре
	string
	Description
	Required if emailAddress isn't used. Up to five email recipients, specified as a collection of
	strings. If emailAddress is also used, the combined number of recipients must be five or
	less.
emailBody	Туре
	textarea
	Description
	Required. The body of the email in plain text.
emailSubject	Туре
	string
	Description
	Required. The email's subject.
senderAddress	Туре
	string

Input	Details
	Description
	Optional. The organization-wide email address to be used as the sender. Required only if
	senderType is setto OrgWideEmailAddress.
senderType	Туре
	string
	Description Optional. Email address used as the email's From and Reply-To addresses. Valid values are:
	 CurrentUser—Email address of the user running the flow. This is the default setting.
	 DefaultWorkflowUser—Email address of the default workflow user.
	 OrgWideEmailAddress—The organization-wide email address that is specified in senderAddress.

Outputs

None.

Submit for Approval Actions

Submit a Salesforce record for approval if an approval process is defined for the current entity.

For more information about creating submit for approval actions, see Creating Approval Actions, and to learn more about approval processes, see Approval Process Overview, in the Salesforce online help.

This object is available in API version 32.0 and later.

Supported REST HTTP Methods

URI

Get a list of actions:

/vXX.X/actions/standard/submit

Formats

JSON, XML

HTTP Methods

GET, HEAD, POST

Authentication

Authorization: Bearer token

Inputs

Input	Details
comment	Туре
	string
	Description
	Optional. Comments that accompany the Approval submission.
nextApproverIds	Туре
	reference
	Description
	Optional. An array of one ID of the next approver, which can be a user or a group. This input is optional because some approval processes have the next approver specified in the approval process definition. You can't specify more than 2,000 approvers.
objectId	Туре
	reference
	Description
	Required. The ID of the record being submitted for approval.
processDefinitionNameOrId	Туре
	string
	Description
	Optional. The ID or name of the approval process to run against the record. If none is specified, the first approval process whose entry criteria the record satisfies is used. Names can't be longer than 120 characters.
skipEntryCriteria	Туре
	boolean
	Description
	Optional. A Boolean value controlling whether the entry criteria for the specified approval process should be evaluated for the record (true) or not (false). If set to true, also specify
	processDefinitionNameOrId.
submitterId	Туре
	string
	Description
	Optional. The ID of the user submitting the record for approval. If none is specified, the submitter is the current user.

Outputs

Output	Details
actorIds	Туре
	reference
	Description
	An array of the IDs of the next approvers.
entityId	Туре
	reference
	Description
	The ID of the record submitted for approval.
instanceId	Туре
	reference
	Description
	The ID of the approval process instance.
instanceStatus	Туре
	string
	Description
	The status of the approval. The valid values are
	 Approved
	Pending
	Rejected
	Removed
newWorkItemIds	Туре
	reference
	Description
	An array of the IDs of the work items created for the next step in this approval process.

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