# Quick Actions Implementation Guide

Salesforce, Spring '23

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# CONTENTS

# QUICK ACTIONS

Quick actions enable users to do more in Salesforce and in the Salesforce mobile app. With custom quick actions, you can make your users' navigation and workflow as smooth as possible by giving them convenient access to information that's most important. For example, you can let users create or update records and log calls directly in their Chatter feed or from their mobile device.

Quick actions can also invoke Lightning components, flows, 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.

Create quick actions, and add them to your Salesforce Classic home page, to the Chatter tab, to Chatter groups, and to record detail pages. Choose from standard quick actions, such as create and update actions, or create custom actions based on your company's needs.

> **Note:** Custom quick actions aren't supported in Chatter groups with customers.

In Salesforce Classic, quick actions appear in the Chatter publisher when Chatter Settings are enabled. In Lightning Experience, they appear in different areas of the user interface, depending on the action's type. In the Salesforce mobile app, actions of all types appear in the action bar, the action bar's action menu, and as list-item actions.

Quick actions come in two flavors.

**Object-specific quick actions**
Object-specific actions have automatic relationships to other records. Users can quickly create or update records, log calls, send emails, and more in the context of a particular object. For example, you add an object-specific action on the Account object that creates contacts. If a user creates a contact with that action on the detail page for the Acme account, that new contact is associated with Acme.

**Global quick actions**
You create global quick actions in a different place in Setup than object-specific actions. They're called global actions because they can be put anywhere actions are supported. Users can log call details, create records, or send email, all without leaving the page they're on.

There are several types of object-specific and global quick actions.

- *Create actions* let users create records—like New Contact, New Opportunity, and New Lead. Global create actions enable users to create object records, but the new record has no direct relationship with other records. Object-specific create actions create records that are automatically associated with related records. They're different from the Quick Create and Create New features on the Salesforce Classic home page, because create actions respect validation rules and field requiredness, and you can choose each action's fields.

- *Update actions* let users make changes to a record.

- *Log a Call actions* let users record the details of phone calls or other customer interactions. These call logs are saved as completed tasks. Object-specific Log a Call actions let users enter notes about calls, meetings, or other interactions that are related to a specific record.

- *Custom actions* invoke Lightning components, flows, Visualforce pages, or canvas apps with functionality that you define. Use a Visualforce page, Lightning component, or a canvas app to create global custom actions for tasks that don't require users to use records that have a relationship to a specific object. Object-specific custom actions invoke Lightning components, flows, Visualforce pages, or canvas apps that let users interact with or create records that have a relationship to an object record.

- Object-specific Send Email actions, available only on cases, give users access to a simplified version of the Case Feed Email action in the Salesforce mobile app. You can use the case-specific Send Email action in Salesforce Classic, Lightning Experience, and the Salesforce mobile app.

- Global *Send Email actions* are supported only in Lightning Experience. You can't add them to the Cases layout or use them with cases.

- *Question actions* enable users to ask and search for questions about the records that they're working with.

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 sets of predefined actions to get you and your users started using actions in your org. Add default actions to publisher layouts to make them available to your users in the full Salesforce site and the action bar in the Salesforce mobile app.

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. Default actions are supported on the account, case, contact, lead, and opportunity objects.

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

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

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

| 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 Event |
|  | • *Thanks* |
|  | • *Link* |
|  | • *Poll* |
|  | • *Question* |

**Note:** Using record types in your org 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 | <ul><li>Subject (default value: Call)</li><li>Comment (description)</li><li>Name</li><li>Related To</li></ul> |
| New Case and New Child Case | <ul><li>Contact Name</li><li>Status</li><li>Subject</li><li>Description</li></ul> |
| New Contact | <ul><li>Name</li><li>Email</li><li>Phone</li><li>Account Name</li><li>Title</li></ul> |
| New Event | <ul><li>Subject</li><li>Start</li><li>End</li><li>All-Day Event</li><li>Name</li><li>Related To</li><li>Assigned To</li><li>Location</li></ul> |
| New Lead | <ul><li>Name</li><li>Email</li><li>Phone</li><li>Company</li><li>Title</li></ul> |
| New Note | <ul><li>Title</li><li>Public (checkbox)</li></ul> |

| 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 a set of preconfigured quick actions. They are available for account, case, contact, lead, and opportunity pages and on the global publisher layout in the Salesforce mobile app. 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 the Salesforce mobile app.

Mobile smart actions are populated with all your org'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.

Mobile smart actions appear as a single action element in the page layout editor. In the Salesforce mobile app, the Mobile Smart Actions element expands to distinct create actions that enable 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<br>• New Contact<br>• Log a Call (logged calls are saved as completed tasks)<br>• New Opportunity<br>• New Case<br>• New Lead |
| Account | • New Task<br>• New Contact<br>• New Case<br>• Log a Call (logged calls are saved as completed tasks)<br>• New Note<br>• New Opportunity |
| Case | • New Child Case<br>• Log a Call (logged calls are saved as completed tasks)<br>• New Task<br>• New Event |

| Layout | Actions Included in Mobile Smart Action Bundle |
|---|---|
| Contact | <ul><li>New Task</li><li>Log a Call (logged calls are saved as completed tasks)</li><li>New Case</li><li>New Note</li><li>New Event</li></ul> |
| Lead | <ul><li>New Task</li><li>Log a Call (logged calls are saved as completed tasks)</li><li>New Case</li><li>New Note</li><li>New Event</li></ul> |
| Opportunity | <ul><li>New Task</li><li>Log a Call (logged calls are saved as completed tasks)</li><li>New Case</li><li>New Note</li><li>New Event</li></ul> |

# 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.

## Enable Actions in the Chatter Publisher

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

| Available in: Salesforce Classic (not available in all orgs) |
|---|
| Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Contact Manager**, **Database.com**, and **Developer** Editions |

By default, the Salesforce Classic 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`.

   Although the Enable Actions setting appears in Lightning Experience, it has no effect there.

4. Click **Save**.

   > **Note:** You aren't required to enable actions in the publisher to use them in the Salesforce app or in third-party apps. See Actions With and Without Chatter for more information.

# 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 let you track the creation of related records from the parent record.

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
    - ContentNote
    - 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
   - Feed updates announcing new related records

# Create Object-Specific Quick Actions

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

⛔ **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

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 action 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 multiple relationships with the target object, select the field to populate when a record's 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. Set the `Relationship` field to Read-Only so that users can view the field on the object.

     – You can't choose Quote as a target object from Opportunity. However, you can still create quotes from an opportunity by going to the opportunity's Quotes related list and clicking **New**.

   - For a Custom Visualforce action, select the Visualforce page, and then specify the height of the action window. The width is fixed.

   - For a Lightning Component action, select the component called by the action.

   - For a flow action, select the flow to render.

5. Enter a label for the action. Users see this label as the name of the action.

   💡 **Tip:** You can choose an option from the Standard Label Type list to have Salesforce generate the label. For 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. If you selected a standard label type in the previous step, you must enter the name. 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, use a detailed description, such as "Create Contact on Account using New Client record type."

8. Select to post a feed item in the record feed when the action's completed.

   When enabled, **Create Feed Item** causes the creation of a feed item when the action is performed. The target object's compact layout defines the feed item's fields.

When feed tracking is enabled for the object, and **All Related Objects** is selected, performing the action causes the creation of a feed item. The feed item is created, regardless of whether **Create Feed Item** is selected.

**9.** For a Create a Record, Update a Record, or Log a Call action, you can add a custom success message. The success message displays after the action executes successfully.

**10.** 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.

**11.** 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 that it's assigned to.

# Visualforce Pages as Object-Specific Custom Actions

A Visualforce page added as a custom action on an object is invoked in the context of a record of that object type. The custom action is passed a specific record ID—the record the user was looking at when the user 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.

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.

```
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>
```

> ✏️ **Note:** When you redirect to a URL internal to your org, the action dialog closes upon completion or programmatically navigating away. If you set up the redirect to point to an external URL, the behavior can vary because an external URL opens in a new browser tab.

## Requirements for Refreshing Host Pages

If you want an object-specific or global custom action 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 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.

# Create Global Quick Actions

You can add global actions to any page that supports actions, like the Home page, the Chatter tab, object pages, and custom Lightning app pages. For example, add a Log a Call action to global layouts so users can record call details right from a Chatter thread.

1. From Setup, in the Quick Find box, enter `Actions`, and then select **Global Actions**.

2. Click **New Action**.

3. Select the type of action 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 that you want to use for records created through this action.

    - For a Custom Visualforce or Custom Canvas action, select a Visualforce page or canvas app, and then specify the height of the action window. The width is fixed.

    - For a Lightning Component action, select the component to be called by the action.

    📝 Note: While you can create Lightning Web Component global actions and add them to the Global Publisher Layout, these actions are available for use only in the Salesforce Field Service (SFS) mobile app. These actions aren't available in Lightning Experience on mobile or desktop.

5. Enter a label for the action. Users see this label as the name of the action.

    💡 Tip: You can choose an option from the Standard Label Type list to have Salesforce generate the label. For 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. If you selected a standard label type in the previous step, you must enter the name. 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 don't recommend 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, use a detailed description, such as "Create Contact on Account using New Client record type."

8. Select to post a feed item in the record feed when the action's completed.

    When enabled, **Create Feed Item** causes the creation of a feed item when the action is performed. The target object's compact layout defines the feed item's fields.

    When feed tracking is enabled for the object, and **All Related Objects** is selected, performing the action causes the creation of a feed item. The feed item is created, regardless of whether **Create Feed Item** is selected.

9. For a Create a Record, Update a Record, or Log a Call action, you can add a custom success message. The success message displays after the action executes successfully.

10. Optionally, to select a different icon for the action, click **Change Icon**.

    Custom images used for action icons must be less than 1 MB

11. Save your changes.

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 that it's assigned to.

# 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.

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.

   For single-select picklists, you can specify both a specific value and a formula value. If you set both, the formula value takes precedence over the specific value.

5. Click **Save**.

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

# 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.
    - Dependent picklists
    - Multi-select picklists
    - Read-only field types like auto-number, formula, and roll-up summary fields
- If you set a predefined value for the lookup field that's used as the action's relationship field, the action ignores the predefined value and uses the parent record ID instead.
- You can't use a dependent picklist to set a predefined value.
- 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 a picklist field on a quick action has both a predefined specific value and predefined formula value, the formula value takes precedence over the specific value.
- If you set a predefined value for a field and leave it on the action layout, that value displays as the default value for the field.
- If you use a rich text field as a predefined field value, any text formatting that was applied in the rich text field is removed in the new field.
- When you have a required field with a predefined value and remove the field from the action layout, you must add the required field back to the action layout if you later delete the field's predefined value. Otherwise, users can't save the record.
- Formulas can't reference fields on external objects, so you can't reference an external object field to set a predefined field value for a quick action.
- You can use a `TEXT(`*`picklist`*`)` value in a predefined value field.
- To set the value for an email action's recipient, predefine the To, CC, or BCC fields. You can use ID fields, such as `Contact.Id`, or string fields, such as `Contact.custom_email_field` to predefine the value.
    - Contact, lead, and person account IDs are supported.
    - Use an ID field if you want to log the email on the recipient's record.
    - Use a string field to predefine an email recipient for a custom object or custom field.
    - If you use a string field, the email isn't logged on the recipient's record.

# Customize Actions with the Enhanced Page Layout Editor

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

> **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 Salesforce Classic.

**Salesforce Mobile and Lightning Experience Actions**
This section can contain actions only from the Mobile & Lightning Actions category in the palette. On object page layouts, the Mobile & Lightning Actions category contains all available types of actions for the object, including quick actions, productivity actions, Lightning component actions, and standard and custom buttons. Actions in this section appear in the action bar and action menu in the Salesforce mobile app 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 Salesforce Mobile 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 Salesforce Mobile and Lightning Experience Actions section inherits the actions from the Quick Actions in the Salesforce Classic Publisher section, plus any standard or custom buttons present on the layout, 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

# GLOBAL PUBLISHER LAYOUTS

Global publisher layouts determine the global actions that appear in the various Salesforce interfaces. In Salesforce Classic and Lightning Experience, these layouts customize the actions on global pages (like the Home page) and on the Chatter page. Lightning Experience also uses these layouts to populate the Global Actions menu. And in the Salesforce mobile app, these layouts drive the actions that appear in the action bar on the Feed and People pages. Global publisher layouts can include global actions only.

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.

You can assign different global publisher layouts to different user profiles to customize which actions users see by default on global pages.

> **Note:** Changes to user layouts override the global publisher layout on user profile pages and the Chatter home page.

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

## EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

## 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

Global publisher layouts determine the global actions that appear in the various Salesforce interfaces. In Salesforce Classic and Lightning Experience, these layouts customize the actions on global pages (like the Home page) and on the Chatter page. Lightning Experience also uses these layouts to populate the Global Actions menu. And in the Salesforce mobile app, these layouts drive the actions that appear in the action bar on the Feed and People pages. Global publisher layouts can include global actions only.

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**.

# Add Actions to Global Publisher Layouts

Actions you add to the global publisher layouts appear on pages such as the Home and Chatter pages. They also appear on the action bar and action menu on the Feed and People pages in the Salesforce mobile app.

Arrange the actions so that the frequently used actions appear first in each list.

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 Salesforce Classic.

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

> 📝 **Note:** Changes to user layouts override the global publisher layout on user profile pages and the Chatter home page. Actions on the user profile page come from the Quick Actions in the Salesforce Classic Publisher section of the global publisher layout. Only standard Chatter actions appear on the user profile page, regardless of which actions are present in the User Page Layout or the global publisher layout.

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.

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.

   > 📝 **Note:** Before using the personal email setting When you click an email address to compose an email, which email editor do you want to use?, confirm that the Global Publisher Layout has the email action in the **Salesforce Mobile and Lightning Experience Action** section.

   > 👁 **Example:** Let's add the New Account action to the publisher on the Home and Chatter pages in Salesforce Classic. The New Account action lets users create an account directly from the publisher. Drag the **New Account** action to the Quick Actions in the Salesforce Classic Publisher section and save your changes.

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### EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Group**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Contact Manager**, **Database.com**, and **Developer** Editions
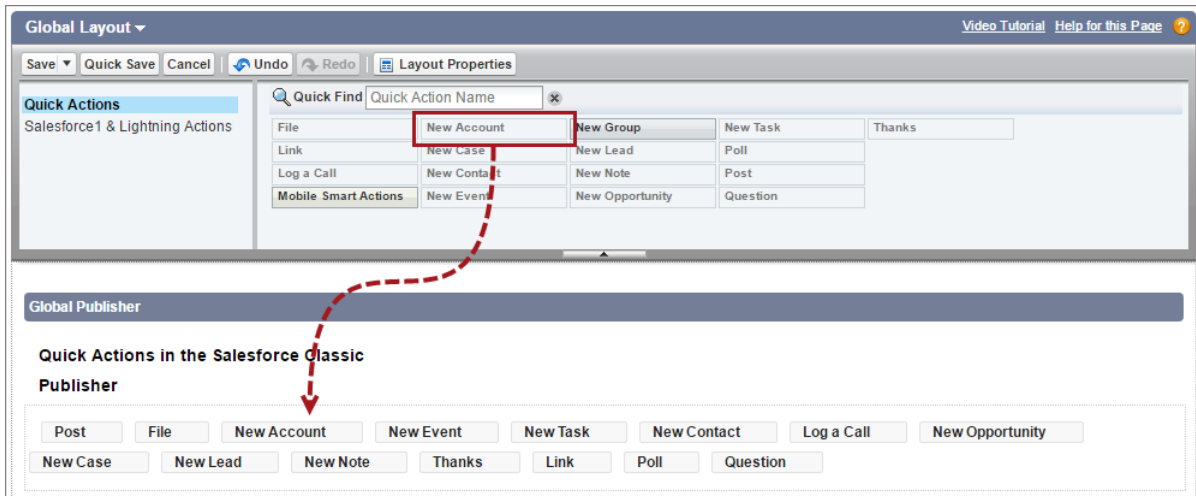
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To create actions:
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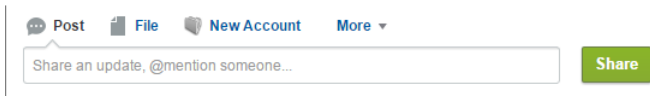To customize action layouts and page layouts:
- Customize Application

To view page layouts:
- View Setup

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



> **Note:** The Chatter page in Lightning Experience supports only the standard Chatter actions Post, Poll, and Question, and if you have Groups, the Announcement action.

# 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 the Salesforce mobile app. 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.

5. From the Publisher Layout to Use drop-down, select the global publisher layout that you want to assign to the highlighted profile.

6. Save the layout.

# 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.

## 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.

## 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 Salesforce Classic, if you include five or more actions in the actions section of a page layout, 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 the Salesforce mobile app, the first three 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.

## 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 a case that lets users create child cases, the default relationship field is `Parent Case`. To be sure that 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.

# I see an error when I select a custom create account action from a person account.

Although your administrator can add the custom create account action to the page layout, this action isn't supported for person accounts.