

QUICK ACTIONS

Definition¹

Where can you place them?^{2,3}

Configuration Options^{2,3}

How they are triggered?^{2,3}



GLOBAL ACTION

Global actions let users create records, but the new record has no relationship with other records. And they're called global actions because they can be put anywhere actions are supported—on record detail pages, but also places like the feed or Chatter groups.

- Salesforce for Outlook - to create records directly from Outlook
- Chatter Global Layouts - to place in Chatter feed, Groups and most object records
- Mobile App (via Global Publisher Layout)
- Home Page
- Chatter tab
- Custom Lightning App pages



OBJECT-SPECIFIC ACTION

Object-specific actions let users create or update records in the context of a particular object. In the Salesforce app, object-specific actions show up on record detail pages. So for example, an action associated with the opportunity object is only available when a user is looking at an opportunity.

- Only on the page layout for that object

- **Action Type:** Create a record, Send an Email, Log a Call, Custom Visualforce, Custom Canvas, Lightning Component.
- **Label Type:** Use standard labels such as “New [Record]” or a completely custom label.
- **Create Feed Item (checkbox):** Creates a feed item when the action is performed. The fields included are controlled by the object's compact layout.
- **Success Message:** Displayed to user after the action has been finished successfully.
- **Icon:** Appears beside action in chatter feed.
- **Target Object (Object Specific Actions Only):** What related object record this action will create.



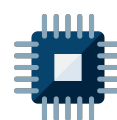
Manually through the user interface



Visual Workflow (Cloud Flow Designer)



Process Builder flows



Apex class / trigger



Macros

1. Salesforce Trailhead: “Salesforce Mobile App Customization: Create Global Quick Actions”
https://trailhead.salesforce.com/en/modules/salesforce1_mobile_app/units/salesforce1_mobile_app_actions_global
 2. Salesforce Help - “Global Actions”
https://help.salesforce.com/articleView?id=actions_overview_global.htm

3. Salesforce Help - Object-Specific Actions
https://help.salesforce.com/articleView?id=actions_overview_object_specific.htm