Act on it

Everything that needs attention, **in one inbox**

Act On It watches your org — for what changed, and for what quietly didn't happen — and puts each thing in front of the person who can deal with it, with the buttons to do it. What your team looks at is what gets done.

Overlay Apps Ltd
Managed package v5.15
Namespace: ActOnIt
AppExchange rating: 5.0
act-on-it.co.uk

One place, not six

Every alert, reminder and prompt in a single inbox, wherever the user is in Salesforce. Something the community has asked Salesforce for since Classic.

It finds what nobody reported

Scheduled checks catch the lead nobody called and the case nobody touched. There's no record change to trigger on, so nothing else catches these.

Attention where it counts

You decide what earns a person's attention, and what can wait. Attention drives outcomes: what your team looks at is what gets done.

It goes to a person

Not a queue, not a subscription list. A named owner — and their manager, if they miss the deadline you set.

Where teams use it

Customer service

- A ticket approaching its SLA deadline
- Priority cases still unassigned
- Tickets waiting too long for triage
- Nobody available to take live chats
- A case reopened after being closed

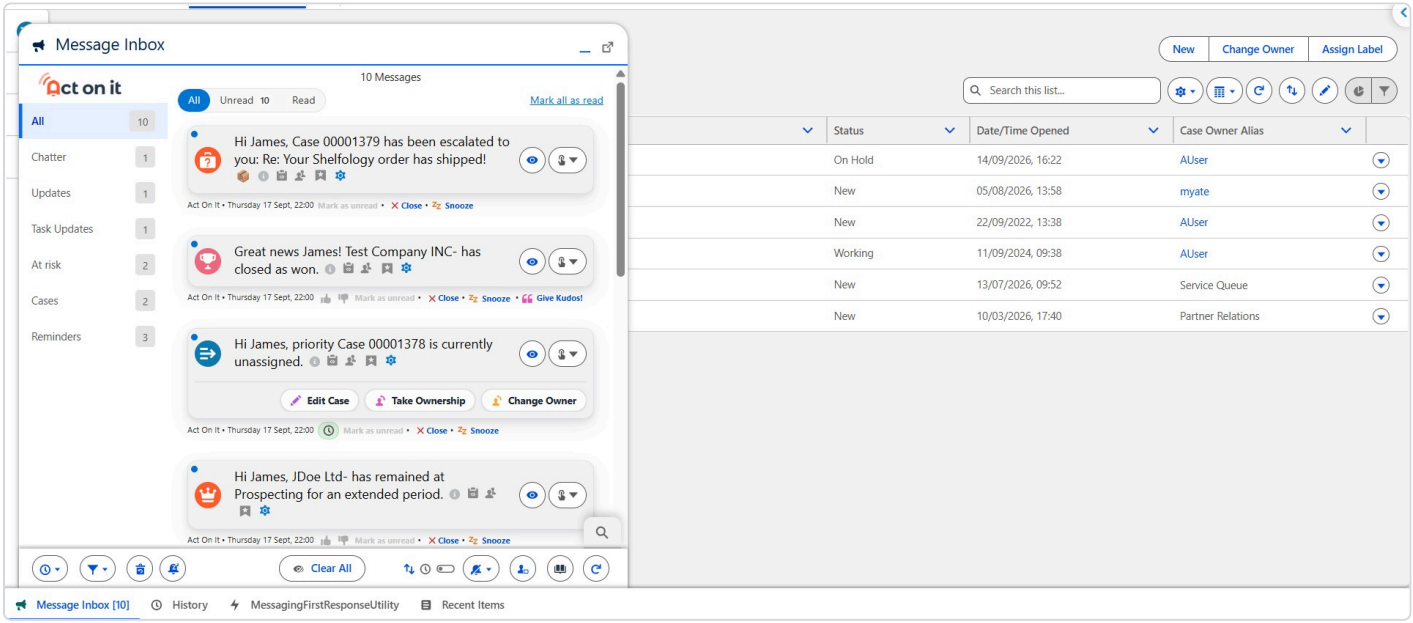
Sales

- A new lead nobody has called yet
- A client opening the quote you sent — ring them now
- Deals stuck in one stage too long
- Closed Won, announced to the team (with confetti)

Operations

- An approval nobody has actioned
- A renewal 60 days out that nobody owns
- Whatever you check by hand every morning

The inbox



The inbox sits in the utility bar, wherever the user happens to be. Alerts stay unread until dealt with, and the buttons on each one do the job without opening the record.

> "Gone from multiple manual checkpoints in my diary to proactively being delivered the information when required. Reduction in training time, reduced client wait times, and risk flagged to agents and managers in the moment."

Emma Corless, Head of Customer Service

5.0 on the AppExchange
Every review, five stars.

"A hidden gem"
Salesforce Ben, free apps round-up.

35 ready-made alerts
Most people have their first live inside 15 minutes.

How alerts are triggered

Event based	Fires on insert or update when your conditions are met, evaluated once the rest of your automation has settled.
Time based	Scheduled checks, once or several times a day, in a chosen time zone — for records that have gone quiet.
Prompts	Persistent guidance on the record page, shown for as long as a condition holds true.
Broadcast & API	Send to a team on demand, or raise an alert from an external system by REST or platform event.

What it can watch

16 standard objects out of the box: Account, Asset, Case, Case Comment, Contact, Contract, Email Message, Event, Feed Item, Feed Comment, Files, Lead, Opportunity, Opportunity Contact Role, Task and User — plus **any custom object**.

- Field change, prior value and record type conditions
- Aggregates, and advanced SOQL for complex logic
- Relative dates, business hours, per-automation time zones

Recipients and delivery

- Users, queues, public groups, roles, and related users on the record
- **Inbox** in the utility bar, unread until dealt with
- **Record page** alerts and prompts
- **Mobile push** via the Salesforce mobile app
- **Email**, toast, spoken announcement, tab blink, confetti

Actions on the alert (14 types)

- Screen Flow, Autolaunched Flow, custom Apex
- Send email with preview; quick create and quick update
- Record edit form, inline; change or take ownership
- Click to dial; Omni accept, decline and close
- Macros, navigation, forward to a colleague

What it records

- Per recipient: delivered, received, read, record viewed, first action, completed
- Snoozed, cleared, missed, expired, blocked, opted out, and thumbs up or down
- Response targets measured in business hours, graded and rolled up per event
- If a colleague responds first, nobody else is marked late

Security and architecture

Native	Managed package running entirely on the Salesforce platform. No middleware, no external service, nothing to host or monitor.
Your data	Stays in your org, under your sharing rules and field-level security.
Governance	Per-object and per-user automation limits, object-level on/off switches, retention periods and scheduled deletion of message history. Per user: availability, mute-until, and preferences for what pops, pings or waits quietly.
Diagnostics	Error logs, trace logging, and validation that deactivates automations referencing fields that no longer exist.
Integration	10 invocable actions for Flow, REST endpoint, platform events, and outbound callouts to named connections.

Requirements and licensing

Platform	Salesforce Lightning Experience; mobile via the Salesforce mobile app.
Install	Managed package from the AppExchange.
Licensing	Free forever for three active alert types, on any subject, for up to 1,000 users, with every feature. Paid plans are licensed per user. Current pricing is at act-on-it.co.uk.

Try it on **one thing**

Install it in a sandbox, set up the alert for whatever you check by hand, and see if it holds. Then put up to three alerts live in production, free for good, with every feature.

Longer read: Salesforce tells you what happened. Who tells you what didn't?

Get it free on the AppExchange →