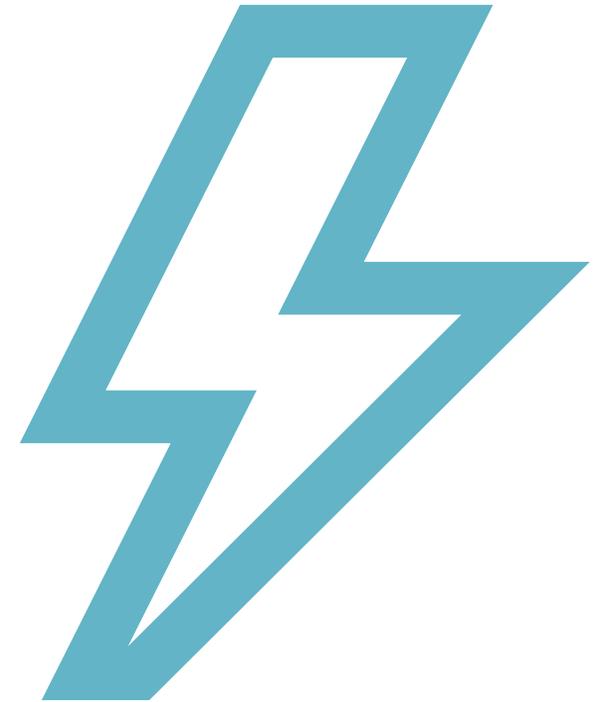


LIGHTNING ACTIONS

FOR SALESFORCE LIGHTNING
EXPERIENCE USERS



HELLO LIGHTNING

WELCOME BACK BROWSER SCRIPTS



- Salesforce has introduced Lightning Platform, packed with more features, capabilities and powerful functions.
- Lightning Framework enables Dev team to create Apps faster and easier.
- One of great UI Framework from Lightning Platform is, **LIGHTNING COMPONENT**.
- Lightning Actions from Lightning Component UI Framework, enables team to code Action Buttons and Messages for Users.
- **BUT** how do we avoid code dependencies and allow Team to **CONFIGURE** changes.

INTRODUCING APP . . .

ADVANTAGE

- Configurable Lightning Actions for Lightning Record Page and Application Home Page.
- Absolutely NO-CODE 😊
- Drive visibility of Actions based on Criteria
- Built on Salesforce Design Principles.
- Responsive Design
- Supports any Salesforce Object.



HOW DOES IT LOOK

This screenshot shows the 'Details' view of an opportunity in the Sales Console. The top navigation bar includes 'Sales Console', 'Home', and a breadcrumb trail: 'Proposal/Price Quote' > 'Negotiation/Review' > 'Closed'. A 'Mark Stage as Complete' button is visible. The main content area is divided into two columns. The left column, titled 'Details', lists various fields such as 'Opportunity Owner', 'Amount', 'Expected Revenue', 'Opportunity Name', 'Close Date', 'Account Name', 'Type', 'Lead Source', 'Order Number', 'Current Generator(s)', 'Tracking Number', 'Created By', and 'Last Modified By'. The right column, titled 'Opportunity Actions', contains buttons for 'Submit for Approval', 'Predict Win', 'Clone', 'Clone with Products', 'Create Quote', 'Create Sales Order', and 'Create Contract'. Below the actions is an 'Opportunity Messages' section with a list of messages, including 'Quote/Proposal is created' and 'Opportunity is not approved. Please obtain approvals before 2020-01-12 00:00:00'. At the bottom, there is a 'New Task' section with options for 'Log a Call', 'New Event', and 'Email', along with a 'Create new...' button and a filter bar.

This screenshot shows the 'Opportunity Actions' view of the same opportunity. The top navigation bar is identical to the previous screenshot. The main content area is divided into two columns. The left column, titled 'Opportunity Actions', contains buttons for 'Submit for Approval', 'Predict Win', 'Clone', 'Clone with Products', 'Create Quote', 'Create Sales Order', and 'Create Contract'. The right column, titled 'Details', lists various fields such as 'Opportunity Owner', 'Amount', 'Expected Revenue', 'Opportunity Name', 'Close Date', 'Account Name', 'Type', 'Lead Source', 'Order Number', 'Current Generator(s)', 'Tracking Number', 'Created By', and 'Last Modified By'. Below the actions is an 'Opportunity Messages' section with a list of messages, including 'Quote/Proposal is created' and 'Opportunity is not approved. Please obtain approvals before 2020-01-12 00:00:00'. At the bottom, there is a 'New Task' section with options for 'Log a Call', 'New Event', and 'Email', along with a 'Create new...' button and a filter bar.

This screenshot shows the 'My Sales Dashboard' in the Sales Console. The top navigation bar includes 'Sales Console', 'Home', and a dropdown menu. The main content area is divided into two columns. The left column, titled 'Quick Links', contains a 'My Sales Dashboard' link. The right column, titled 'Assistant', contains a '30 days' link. Below the quick links is a 'Quarterly Performance' section. The performance summary shows 'CLOSED 0 €', 'OPEN (>70%) 235.000 €', and 'GOAL --'. Below the summary is a line chart showing quarterly performance. The y-axis ranges from 150k to 250k. The chart shows a sharp increase from approximately 150k in the first quarter to approximately 235k in the second quarter, with the second quarter value exceeding the goal line.



**LET'S
INSTALL
APP**

AFTER INSTALLING THE APP...

Assign

Assign yourself Righteous Lightning Action Administrator permission set.

Assign other users Righteous Lightning Action User permission set.

Enable

Go to your profile and enable 2 record types under (Righteous) Lightning Action object.

- Quick Action
- Page Message

AN EXAMPLE, TO START WITH

SUPPOSE, YOUR SALES TEAM HAS INTRODUCED A NEW PROCESS TO PREDICT OPPORTUNITY WIN USING EINSTEIN ANALYTICS.

FUNCTIONAL TEAM WANTS TO SHOW AN ACTION BUTTON ON LAYOUT SO SALES REP CAN CHECK THE FUNCTION WHEN AVAILABLE.

I WILL HELP YOU TO CREATE AN ACTION FROM SCRATCH. FOLLOW THE PAGES TO END, TO CREATE ACTIONS WITHOUT ANY CODE.



STEP 1: CREATE CONFIGURATION

Go to 'Lightning Action Configuration' tab and create New

1. Give a logical name to Record Name. It is not used or displayed on UI.
2. Select 'Record Page' for Display Page.
3. Choose 'Opportunity' as Object. This would mean that we're creating Lightning Actions which are going to be displayed on Opportunity Record Page.
4. Header text for LightningAction and LightningMessage components. More details on Lightning Labels in next pages.
5. Let's not select the Activate checkbox
6. Save

The screenshot shows the 'Lightning Action Configuration' page for 'Opportunity Actions'. The page has a title bar with 'Lightning Action Configuration' and 'Opportunity Actions' (with a gear icon), and 'Edit' and 'Delete' buttons. Below the title bar, there are fields for 'Lightning Action Configuration Name' (Opportunity Actions), 'Owner' (Sales Rep), and 'Description'. A 'Setup' section contains 'Display Page' (Active), 'Record Page' (checked), 'Object' (Opportunity), and 'Lightning Application Name'. A 'User Interface' section contains 'Header (Quick Actions)' (Opportunity Action Header Label) and 'Label' (Opportunity Actions). A 'System Information' section is partially visible at the bottom.



- Display Page is of 2 types, Actions can be displayed on Record Page or Lightning App Home Page.
- If Actions are created for Home Page, choose Display Page and Lightning Application Name.
- Lightning Labels are User Interface labels, and can be translated to any language supported by Salesforce.

STEP 2: CREATE A NEW LIGHTNING ACTION

WITH “QUICK ACTION” RECORD TYPE

USER INTERFACE

1. **Label Type:** Lightning Label (to enable translated values)
Create a new Lightning Label or provide a static label value.
2. **ICON:** Name of the icon. Icon name should be referenced from Salesforce [Lightning Design System](#) library
3. **SEQUENCE:** Display order of action on UI.
4. Provide Icon Size, Tooltip text etc.

TARGET

1. **TARGET TYPE:** Select if User should be redirected to URL or Visual Flow should be invoked.
2. **TARGET URL:**
Provide custom URL. You may use Object custom field value to be passed in URL as Parameter.
Example:
`/apex/PredictOpportunityWin?id={!Id}`
Or use Visual Flow Name to be called.



Object field value in URL goes in format of
`{!<fieldname>}`

CONDITION

Hold on it for now

LOOKS GOOD ?

LET'S SEE HOW IT
LOOKS ON PAGE.

 Lightning Action
Predict Win

[New Contact](#) [Edit](#) [New Case](#)

Lightning Action Name Predict Win		Lightning Action Configuration ⓘ Opportunity Actions
Description Predict Win		Lightning Action Group ⓘ
Active <input checked="" type="checkbox"/>		Record Type
▼ User Interface		
Label Type ⓘ Lightning Label		Sequence ⓘ 3
Label ⓘ Predict Win		Icon ⓘ standard:dashboard
Lightning Label ⓘ Predict Win - Opportunity Action		Icon Size ⓘ medium
Tooltip Text ⓘ		Severity ⓘ
▼ Validation		
Conditions Met ⓘ All		Advanced Condition ⓘ
▼ Target Handling		
Target Type ⓘ URL		Target URL ⓘ /apex/PredictWinOpportunity?id={!Id}
Created By		Last Modified By

The screenshot displays the Salesforce Lightning App Builder interface. At the top, the page is titled "Opportunity Record Page". Below the header, there are navigation and utility buttons: "Desktop", "Shrink To View", and "Refresh".

The left sidebar, titled "Lightning Components", contains a search bar and a list of components. Under the "Custom (2)" section, the "LightningActions" component is selected. Below this, the "Custom - Managed (0)" section is visible with the note "No components available."

The main workspace shows a record page layout for an Opportunity. At the top, a progress bar indicates the current stage is "Proposal/Price Quote", with previous stages marked as complete. A "Mark Stage as Complete" button is present. Below the progress bar, the page is divided into two main sections: "Details" and "Related".

The "Details" section contains a table of fields for the Opportunity record:

Opportunity Owner	Amount
Sales Rep	235,000.00 €
Private	Expected Revenue
	176,250.00 €
Opportunity Name	Close Date
Burlington Textiles Weaving Plant Generator	16/3/2020
Account Name	Next Step
Burlington Textiles Corp of America	
Type	Stage
New Customer	Proposal/Price Quote
Lead Source	Probability (%)
Phone Inquiry	75%
	Primary Campaign Source
Order Number	Main Competitor(s)
645612	John Deere
Current Generator(s)	Delivery/Installation Status
John Deere	Yet to begin
Tracking Number	
830150301360	
Created By	Last Modified By
Sales Rep, 14/5/2019 10:25 AM	Sales Rep, 8/1/2020 10:52 PM
Description	
Delivery Status	

The "Related" section is currently empty, displaying the message "No Lightning Action Configuration found for Object." Below this, there are buttons for "New Task", "Log a Call", "New Event", and "Email". A "Create new..." button with an "Add" button next to it is also visible.

STEP 3: ADD LIGHTNING COMPONENT ON PAGE

Edit Opportunity Object's Lightning Record Page.

Select 'LightningActions' from Component Panel from left and drag it to target section.

Save and click on Activation button.

DON'T SEE ACTION ON PAGE?

HMMM.. DID YOU ACTIVATE
THE LIGHTNING ACTION
CONFIGURATION AND/OR
LIGHTNING ACTION YOU
CREATED IN STEP - I AND
STEP - II.



✓ ✓ ✓ ✓ ✓ **Proposal...** Negotiati... Closed
 ◀ ▶
✓ Mark Stage as Complete

Details

Related

Opportunity Owner	Amount
Sales Rep	235.000,00 €
Private	Expected Revenue
<input type="checkbox"/>	176.250,00 €
Opportunity Name	Close Date
Burlington Textiles Weaving Plant Generator	16/3/2020
Account Name	Next Step
Burlington Textiles Corp of America	
Type	Stage
New Customer	Proposal/Price Quote
Lead Source	Probability (%)

Opportunity Actions

[Predict Win](#)

[New Task](#)
[Log a Call](#)
[New Event](#)
[More](#)

Add

Filters: All time • All activities • All types ▼

[Refresh](#) • [Expand All](#) • [View All](#)

LOOKS GOOD.

NOW, IT WOULD MAKE SENSE TO HIDE THIS ACTION WHEN OPPORTUNITY IS CLOSED ALREADY.

FINE, LET'S GO BACK TO THE ACTION WE CREATED IN STEP 2.

REMEMBER, I TOLD YOU TO HOLD ON CONDITION SECTION ON STEP - 2. NOW IS THE TIME TO GO BACK TO IT.



STEP 4: CREATE ACTION CONDITION

Create Action Condition for Is “Opportunity not Closed Won”

1. Choose Object as Opportunity
2. Choose ‘Field Validation’ as Validation Type.
3. Provide ‘StageName’ as Object Field.
4. Select ‘not equals’ for Operator.
5. Select ‘Value’ for Target Type.
6. Target Value would ‘Closed Won’.

Create another Action Condition for “Is Opportunity not Closed Lost”.

The image shows two screenshots of the Salesforce Lightning Action Condition configuration interface. The top screenshot shows the 'Details' tab for a Lightning Action Condition with ID #000013. The configuration is as follows:

Field	Value
Lightning Action Condition Name	#000013
Label	
Is Opportunity Closed Won	
Object	Opportunity
Validation Type	Field Validation
Apex Validation	
Field Validation	
Object Field	StageName
Operator	not equals
Target Type	Value
Target Value	Closed Won
Target Field	

The bottom screenshot shows the same configuration but with the Target Value set to 'Closed Lost'.

Field	Value
Object Field	StageName
Operator	not equals
Target Type	Value
Target Value	Closed Lost
Target Field	



VALIDATION

UPDATE THE
OPPORTUNITY
TO CLOSE WON
OR CLOSED
LOST.

NOTICE THAT
'PREDICT WIN'
ACTION IS NO
MORE VISIBLE.



STILL NOT COMPLETE?

PERFECT, BUT PREDICT WIN ACTION SHOULD ONLY BE VISIBLE:

IF OPPORTUNITY ACCOUNT IS OF TYPE “CUSTOMER – DIRECT” OR “CUSTOMER – CHANNEL”.



ADD MORE CONDITIONS TO 'PREDICT WIN'

Create Action Condition for “Is Opportunity Account Customer – Direct”

1. Choose Object as Opportunity
2. Choose ‘Field Validation’ as Validation Type.
3. Provide ‘Account.Type’ as Object Field.
4. Select ‘equals’ for Operator.
5. Select ‘Value’ for Target Type.
6. Target Value would ‘Customer - Direct’.

Create another Action Condition for “Opportunity Account Customer – Channel”.



Lightning Action

Predict win Actions Using Einstein

New Contact

Edit

New Case



Details

Lightning Action Name

Predict win Actions Using Einstein

Description

Invoke a custom process for Einstein Analytics

Lightning Action Configuration ⓘ

[Opportunity Actions](#)

Lightning Action Group ⓘ

Active



> User Interface

▼ Validation

Conditions Met ⓘ

Custom

Advanced Condition ⓘ

#1 AND #2 AND (#3 OR #4) AND #5

> Target Handling



Lightning Action Conditions (5)

New

Lightning Action Condition Name	Index	Validation Type	Object Field
#000013	1	Field Validation	StageName
#000014	2	Field Validation	StageName
#000015	3	Field Validation	Account.Type
#000016	4	Field Validation	Account.Type
#000019	5	Apex Validation	



CAN WE RESTRICT ACCESS FURTHER?

**WORKS WELL, NOW ACTION SHOULD
ONLY BE VISIBLE TO "SALES
MANAGER" USERS.**

VALIDATE LOGGED IN USER

Create an Action Condition for and name it as “Is User Sales Manager”.

1. Choose Object as User
2. Choose ‘Field Validation’ as Validation Type.
3. Provide ‘Profile.Name’ as Object Field.
4. Select ‘equals’ for Operator.
5. Select ‘Value’ for Target Type.
6. Target Value would ‘Solution Manager’.

Don't forget to add Condition back to your Advanced Condition expression 😊



Object Field follows convention of SOQL. You may use any field which is part of valid SOQL.
e.g., **Account.CreatedBy.Profile.Name** for Opportunity Object field.

 Lightning Action Condition
#000017

Related **Details**

Lightning Action Condition Name
#000017

Label ⓘ
Is User Sales Manager

Object ⓘ
Current User

Validation Type
Field Validation

> Apex Validation

∨ Field Validation

Object Field ⓘ
Profile.Name

Operator ⓘ
equals

Target Type ⓘ
Value

Target Value ⓘ
Sales Manager

Target Field ⓘ

YOU KNOW WHAT, SCRATCH THAT.

WELL, I WAS DEMONSTRATING THIS PREDICT WIN TO OTHER TEAM MEMBERS. THEY ARE IMPRESSED AND WANT TO USE IT.

BUT THEY ARE NOT SALES MANAGER, SOME USERS HAVE DIFFERENT PROFILE AND ROLE ASSIGNED.

HOW DO WE CONFIGURE ACTIONS IN THIS CASE. I REALLY DON'T WANT TO CREATE TOO MANY CONDITIONS AND LONG EXPRESSION.

I THINK, IT'S TIME TO CALL CODEY.



Hey Codey



Hi, How's going?

Great, Thanks 😊
I need your quick help.



Shoot 😊

Remember, I was using that App for managing Actions in Lightning Component.
I need to extend Predict Win to other users as well, who are other than just Sales Manager.
How do we control the visibility and access of the action.



Hmm.. Let's create a Custom Permission to handle that.

I will create "Einstein Opportunity Predict Win User" custom permission set.

In the App, we can use Apex Validators as well. So we will write small Apex class to check if logged in user has this custom permission.

Okay, that's great. I will connect with you shortly to discuss more on this.
Thanks for quick help though. Have a good day !



APEX BASED VALIDATION...

Related	Details
Lightning Action Condition Name #000019	Lightning Action ⓘ Predict win Actions Using Einstein
Label ⓘ Current User Custom Permission Set check	Lightning Action Group ⓘ
Object ⓘ Current User	
Validation Type Apex Validation	
▼ Apex Validation	
Apex Class Name ⓘ OpportunityLightningActionValidations.CustomPermissionSetValidator	Apex Query Fields ⓘ Name, Email, Profile.Name

```
global class OpportunityLightningActionValidations {  
    private static final String PREDICT_WIN_CUSTOM_PERMISSIONSET = 'OpportunityPredictWinUser';  
  
    global class CustomPermissionSetValidator implements Righteous.ILightningActionConditionValidator {  
        global boolean validateCondition(SObject recordSO,  
                                         Map<String, Righteous.SObjectFieldValueWrapper> recordFieldValueMap) {  
  
            User userSO = (User) recordSO;  
  
            System.debug('Validating if logged in User has Custom Permissionset');  
            System.debug('Current User Info: Name = '+userSO.Name);  
            System.debug('Current User Info: Email = '+userSO.Email);  
  
            return FeatureManagement.checkPermission(PREDICT_WIN_CUSTOM_PERMISSIONSET);  
        }  
    }  
}
```



- Apex Validator Class must implement ILightningActionConditionValidator interface.
- Developers do not need to write SOQL in Apex callback method. Specify Object Field API names in Apex Query Fields to use values in callback method.
- In Callback, Developer may use either SObject instance or Map of Field-Value pair of record.

IT'S GETTING POPULAR.

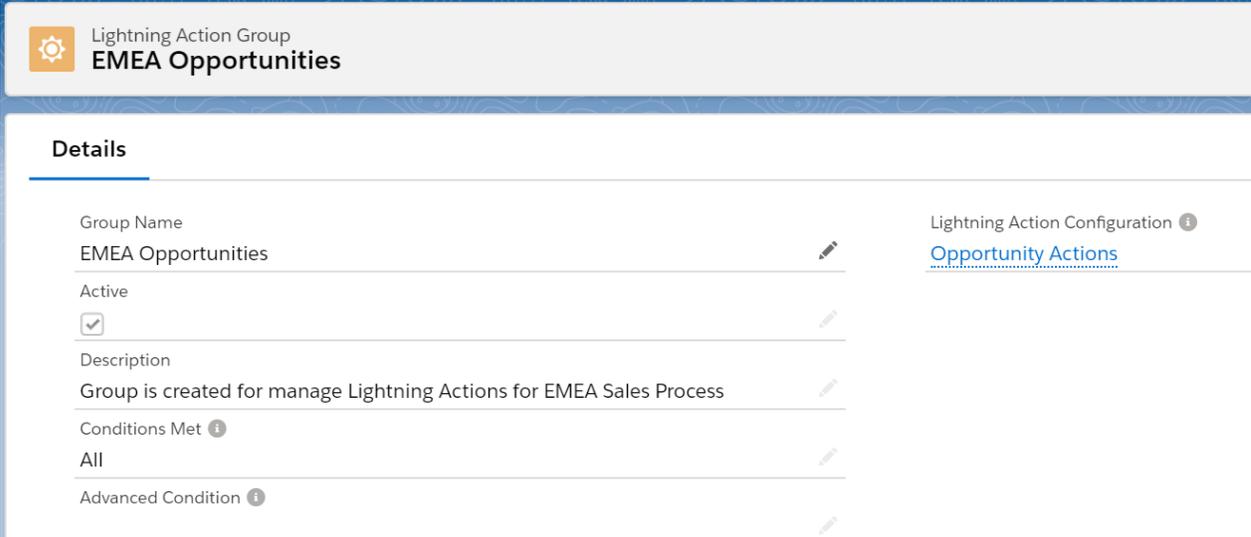
- Our global sales team is also interested and excited to managed their sales click paths using lightning actions app.
- I have already discussed their sales process setup with respective sales ops team.
- We do have an issue here, our sales process is so diverse based on geographical region, and there is no chance they can use our config.
- So let's create a Lightning Action Group for them, and divide actions into groups. As we're using record type for logical distribution of Opportunities, we will use the same for grouping actions.



STEP 6: GO BACK TO LIGHTNING ACTION CONFIGURATION

Go to 'Opportunity Actions' Lightning Action Configuration record created in Step – 1.

1. Create New Lightning Action Group for EMEA.
2. Mark 'Active' checkbox.
3. Set 'All' for Condition Met.
4. Save.



The screenshot displays the configuration page for a Lightning Action Group named 'EMEA Opportunities'. The page header includes a gear icon and the text 'Lightning Action Group EMEA Opportunities'. Below the header, the 'Details' section is visible, listing several configuration items:

Field	Value	Action
Group Name	EMEA Opportunities	Edit
Active	<input checked="" type="checkbox"/>	Edit
Description	Group is created for manage Lightning Actions for EMEA Sales Process	Edit
Conditions Met	All	Edit
Advanced Condition		Edit

On the right side of the configuration, there is a link for 'Lightning Action Configuration' with a help icon, and a blue link for 'Opportunity Actions'.

STEP 7: CREATE CONDITIONS FOR GROUP

Go to 'EMEA Opportunities' Lightning Action Group record created in Step – 6.

Create a New Lightning Action Group Condition of Field Validation Type, and check if Opportunity Record Type is EMEA.



Lightning Action Condition
#000019

Related

Details

Lightning Action Condition Name
#000019

Label ⓘ
Opportunity Record Type is EMEA

Object ⓘ
Opportunity

Validation Type
Field Validation

∨ Apex Validation

Apex Class Name ⓘ

∨ Field Validation

Object Field ⓘ
RecordTypeId

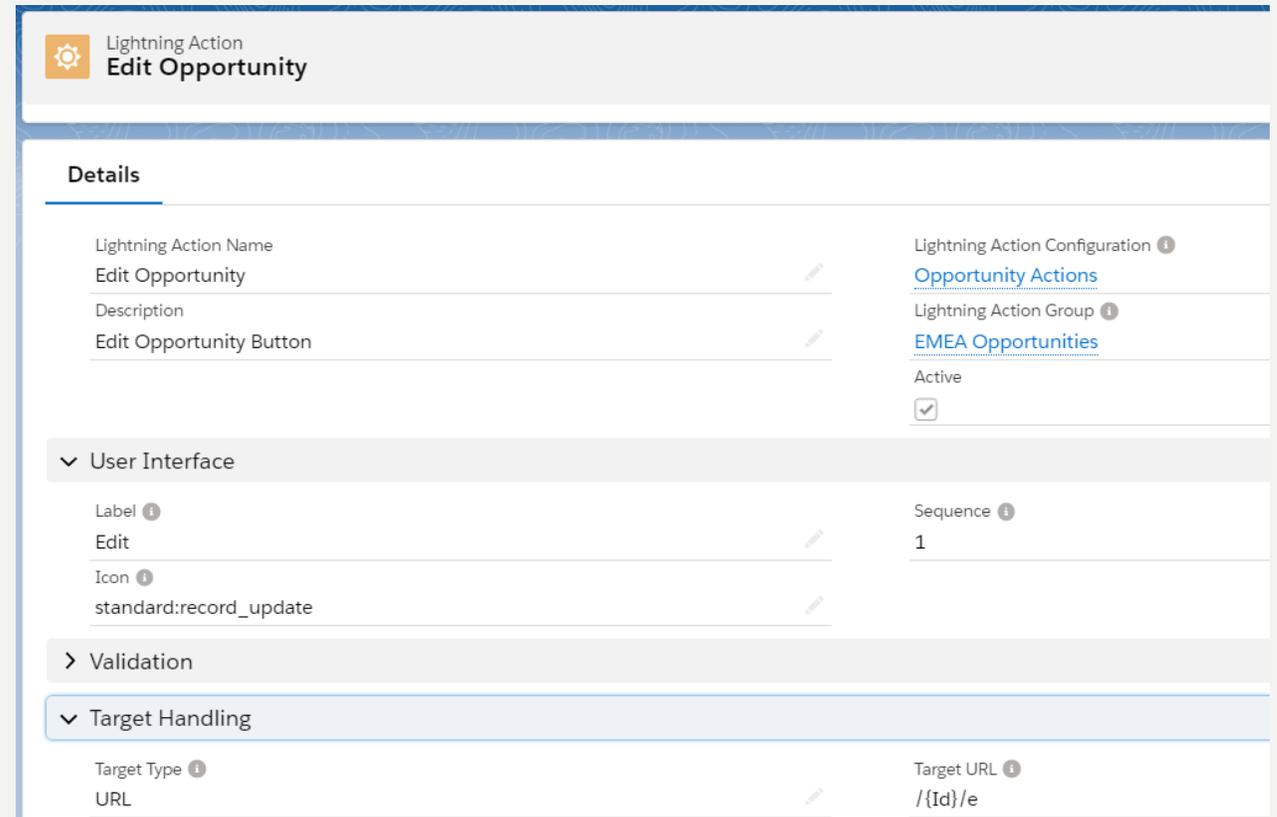
Operator ⓘ
equals

Target Type ⓘ
Value

Target Value ⓘ
0122p000000d34GAAQ

STEP 8: CREATE LIGHTNING ACTION FOR EMEA

- Create New Action 'Edit Opportunity' for EMEA Sales Process.
- Associate Lightning Action with Parent Lightning Action Configuration for Opportunity.
- Associate current Lightning Action with Lightning Action Group for EMEA
- Setup UI and Target URL attributes.
- Activate.
- Save



The screenshot shows the 'Lightning Action Edit Opportunity' configuration page. It is divided into several sections: 'Details', 'User Interface', 'Validation', and 'Target Handling'. The 'Details' section includes fields for 'Lightning Action Name' (Edit Opportunity), 'Description' (Edit Opportunity Button), 'Lightning Action Configuration' (Opportunity Actions), and 'Lightning Action Group' (EMEA Opportunities). The 'Active' checkbox is checked. The 'User Interface' section includes 'Label' (Edit) and 'Icon' (standard:record_update). The 'Target Handling' section includes 'Target Type' (URL) and 'Target URL' (/Id)/e.

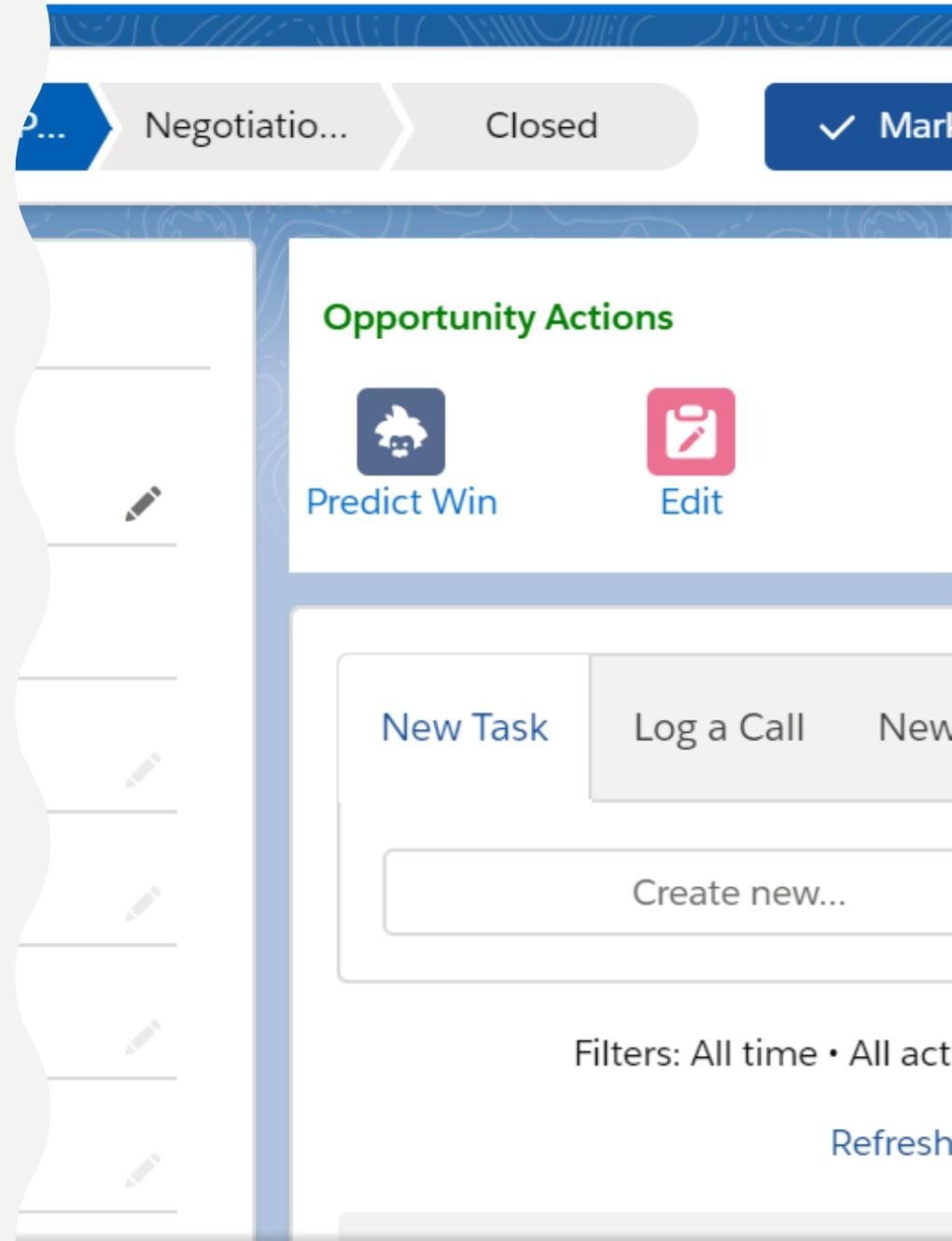
Lightning Action	
Edit Opportunity	
Details	
Lightning Action Name Edit Opportunity	Lightning Action Configuration Opportunity Actions
Description Edit Opportunity Button	Lightning Action Group EMEA Opportunities
	Active <input checked="" type="checkbox"/>
User Interface	
Label Edit	Sequence 1
Icon standard:record_update	
Validation	
Target Handling	
Target Type URL	Target URL /{Id}/e



- Important to note here, Lightning Action record is linked to Lightning Action Group for EMEA.
- Lightning Action Group Conditions will be evaluated first, and if Group Conditions are met, then only Lightning Action records' conditions will be evaluated.

PERFECT...!

- Edit Actions is now only getting displayed for EMEA Opportunities.
- We can ask EMEA Functional Team to manage their Actions under 'EMEA' Lightning Action Group.



ENABLE TRANSLATED USER EXPERIENCE

Global team from Europe and APAC region wants to use the system. The users are using non-English. We must translate the UI Texts in logged in user's native language.

Please execute below steps to translate.

Go to any Lightning Label we created in earlier steps.

- Click on New Lightning Label Translation.
- Select the target Language and provide Translation.

Related	Details
	Lightning Label Translation Name LT-0000003
	Language Portuguese (Brazil)
	Translation Prever vitória



When any user with Portuguese language log in, they would view Translated Lightning Action. Lightning Actions 100% translatable.

CAN WE ADD CONDITIONAL MESSAGES TO GUIDE SALES TEAM?

- We need to configure criteria-based Lightning Messages. Just like clickable actions we created, we can also create Page Messages.
- You might have noticed “Page Message” record type while creating Lightning Actions.
- Create any Lightning Actions of type “Page Message” and activate it. Page Messages only support Lightning Label based texts. We can also have merge fields in Lightning Labels. Examples are in following pages.
- Edit Opportunity Lightning Record Page and add “LightningMessages” aura component.

OPPORTUNITY APPROVAL WARNING

Opportunity Messages

-  Quote/Proposal is created.
-  Opportunity is not **approved**. Please obtain approvals before 2020-01-12 00:00:00
-  Opportunity discounts exceed thresholds for [Burlington Textiles Corp of America](#)

Lightning Action

Opportunity is not approved

New Contact Edit New Case

Lightning Action Name	Opportunity is not approved	Lightning Action Configuration	Opportunity Actions
Description		Lightning Action Group	
Active	<input checked="" type="checkbox"/>	Record Type	Page Message

Severities

Severity	Warning	Sequence	1
Lightning Label	Opportunity Approved Pending	Icon	utility:warning
		Icon Size	small
		Tooltip Text	

Lightning Label

Opportunity Approved Pending

New Contact Edit

Details

Lightning Label Name	Opportunity Approved Pending	Owner	 Sales Rep
Label Value	Opportunity is not approved . Please obtain approvals before {!closedate}		
Created By		Last Modified By	



Page Messages can be dynamic and formatted. It supports native html format tags and merge fields

OPPORTUNITY DISCOUNT ERROR

Opportunity Messages

 Quote/Proposal is created.

 Opportunity is not **approved**. Please obtain approvals before 2020-01-12 00:00:00

 Opportunity discounts exceed thresholds for [Burlington Textiles Corp of America](#)

Lightning Action **Opportunity Discount > Threshold** New Contact Edit New Ca...

Lightning Action Name	Opportunity Discount > Threshold	Lightning Action Configuration	Opportunity Actions
Description		Lightning Action Group	
Active	<input checked="" type="checkbox"/>	Record Type	Page Message

User Interface

Severity	Error	Sequence	2
Lightning Label	Opportunity Threshold	Icon	utility:ban
		Icon Size	small
		Tooltip Text	

Lightning Label **Opportunity Threshold**

Details

Lightning Label Name
Opportunity Threshold

Label Value
Opportunity discounts exceed thresholds for {!account.name}

HOW ABOUT ADDING ACTIONS ON HOME PAGE?

- I will let you configure Actions which are going to be displayed on 'Sales Console' App Home Page.
- Create one Action which should redirect user to 'MySalesPerformance' dashboard.
- Hint: Create a new Lightning Action Configuration records and choose field value as:
 - Display Page → App Home Page
 - Object → Current User
 - Lightning Application Name → Sales Console
- Add Lightning Component Sales Console App page.
- Let me show you snapshots of what my colleague has configured.



Lightning Action Configuration
Sales Console Home Page Edit Delete

Lightning Action Configuration Name
 Sales Console Home Page ✎

Description ✎

Setup

Display Page	Active
App Home Page ✎	<input checked="" type="checkbox"/> ✎
Object ¹	Lightning Application Name
Current User ✎	Sales Console ✎

User Interface

Label Type ¹	Label ¹
Value ✎	Quick Links ✎

System Information

Lightning Action
My Sales Dashboard - Sales Console New Contact Edit New Case ▼

Details

Lightning Action Name My Sales Dashboard - Sales Console ✎	Lightning Action Configuration ¹ Sales Console Home Page
Description ✎	Lightning Action Group ¹ ✎
	Active <input checked="" type="checkbox"/> ✎

User Interface

Label ¹ My Sales Dashboard ✎	Sequence ¹ 1 ✎
Icon ¹ standard:dashboard ✎	

Validation

Target Handling

Target Type ¹ URL ✎	Target URL ¹ /01Z2p0000012WTIEAM ✎
--	---



Quick Links



My Sales
Dashboard

Assistant

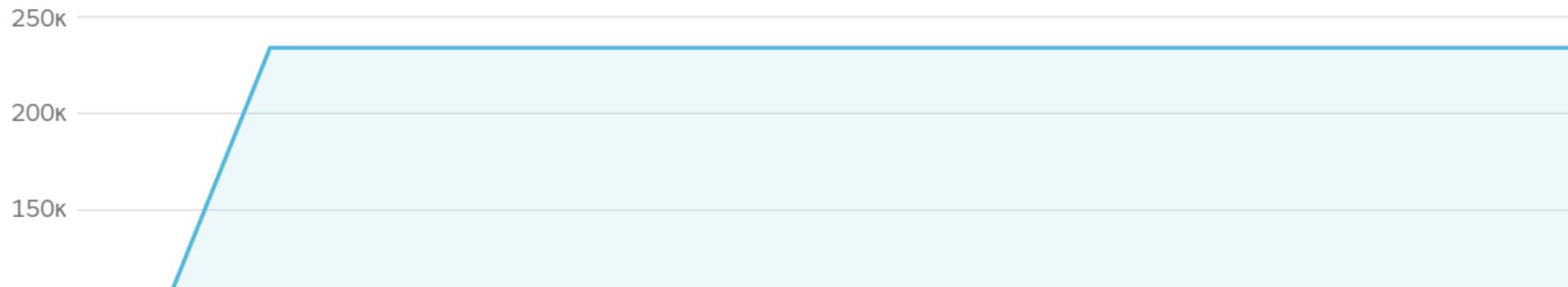
>  30 da
Ursa

Quarterly Performance

As of Today 12:22:50 PM



CLOSED 0 € OPEN (>70%) 235.000 € GOAL -- 

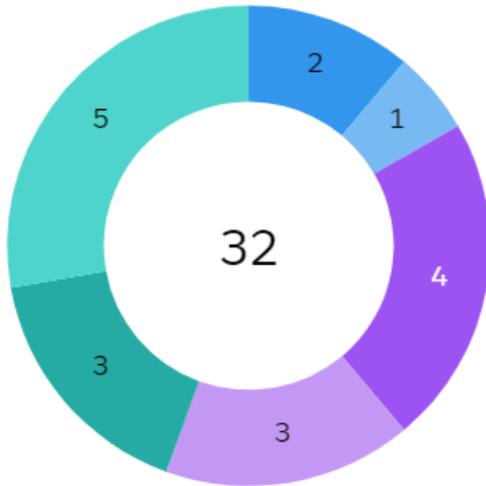




Opportunities By Account



Record Count



Account Name

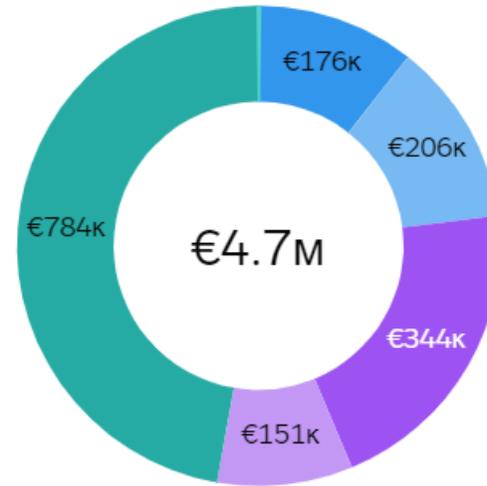
- Burlington Textiles ...
- Dickenson plc
- Edge Communicati...
- Express Logistics a...
- GenePoint
- Grand Hotels & Res...

[View Report \(OpportunityByAccount\)](#)

Expected Revenue By Account



Sum of Expected Revenue



Account Name

- Burlington Textiles ...
- Edge Communicati...
- Express Logistics a...
- GenePoint
- Grand Hotels & Res...
- Other

[View Report \(OpportunityByAccount\)](#)

THAT'S IT, BUT STILL HAS MORE TO IT...

- Good Stuff, I hope you were able to configure and validate the changes along.
- You know what, there is no harm in playing with data. Create buttons, add conditions, remove conditions, add groups, etc.
- Try to recall any use case you had come across in past and try to configure here.
- Create config for any of your Custom Object's record page. You just need to add Object API Name to 'Object' Picklist and you're good to go.



USEFUL TIPS FOR ADMINS

- If any Lightning Action admins configured is not getting rendered and they want to debug, check the browser console (F12) to see if any condition is throwing the error.
 - Righteous Lightning Action application executes following all security principles. So please make sure if any field used in condition, the corresponding FLS is given to running user.
 - In case severe failure, The App displays the standard error messages. You can always override the error messages by doing Custom Label Translation Override.
 - The running user must have access to Lightning Action Configuration, Lightning Action, Lightning Action Condition, Lightning Action Group, Lightning Label and Lightning Label Translation access. It is recommended to assign Righteous Lightning Action User permission set to running users.
 - Admins can design the Sharing model on Lightning Action Configuration and Lightning Action objects, to manage different Action Configurations for different team members.
 - Any Lightning Action Configuration can also be evaluated by calling Managed Package class. If admin prefer to build the custom UI, they can still configure the action and criterias using code:
- 

SAMPLE CODE FOR CUSTOM LIGHTNING ACTION CONTROLLER

```
public class CustomLightningActionController{

    public List<righteous__LightningAction__c> getValidConditions(Id opportunityId) {

        /** method signature:
         *
         * righteous.LightningActionAPI.validateActions(String displayType, String objectAPIName, Id recordId)
         *
         * displayType : Record Page
         * objectAPIName: API name of the custom/standard object
         * recordId: Id of the record of object type.
         *
         * */
        righteous.LightningActionResultWrapper validActionResultWrapper =
            righteous.LightningActionAPI.validateActions('Record Page', 'Opportunity',opportunityId);

        System.debug(validActionResultWrapper);
        return validActionResultWrapper.lightningActionList;

    }
}
```

CUSTOM LABELS USED IN APPLICATION

Name	Value
LightningAction_API_MissingParam	Input parameter not found:
LightningAction_Configuration_NF	No Lightning Action Configuration found for Object.
LightningAction_FieldAPIName_NA	Field is not accessible or Field is encrypted
LightningAction_ObjectAPIName_NA	Object is not accessible
LightningAction_ObjectAPIName_NF	Object API name not found in URL Param.
LightningAction_ObjectAPIName_NV	Object API Name is not found in Salesforce org.
LightningAction_RecordID_NF	Record Id not found in URL Parameter.
LightningMessage_NF	No Page Message available.

WE GOTTA GO...

BUT WE WILL BE AROUND...

**THANK YOU SO MUCH FOR
SCROLLING THROUGH...**

**WE TAKE OUR FEEDBACKS
SERIOUSLY SO PLEASE
SHARE...**

hello@righteous.co.in

