# Configure CRM Actions

CRM actions are taken on objects (both standard and Custom) to help user achieve their CRM objectives.

User should be provided with the custom permission "AllowToTakeActionOnConversation" in order to perform (access) any CRM Action.

CRM Actions can be configured in two ways:

- From Custom Object Builder
- From Converse Settings interface

Refer to the SMS-Magic Guide for Salesforce Admin for details on configuring the CRM Actions from Converse Settings.

## Configure CRM Actions from Custom Object Builder

CRM Actions can be configured under three objects. The table given below highlights the three objects and the relevant fields you need to customize:

| **Action**<br>**Stores all the actions from which the user chooses** | |
|---|---|
| **Attributes** | **Description** |
| Action Name | Type the name of the action to be performed. For example, Create a lead. |
| Action To Perform | Add the action to be performed. For example, create a record.<br>This is Picklist data type. |
| Action Type | Select the type of action to be performed. For example, Manual. |

| | |
|---|---|
| Description | Type a brief description on the objective achieved by the action.For example, this action will create a new record. |
| **Action Parameter Define the parameters that helps user perform the actions** | |
| **Attributes** | **Description** |
| Action Parameter Name | Type a name for the Action parameter. |
| Parameter Type | Enter the parameter type. For example, Field, URL |
| Parameter Name | Type the name of the parameter. For example, ObjectName. |
| Action | Select the action that you have created under Actions setup page. |
| Parameter Value | Type the value of the parameter. For example, Field name or value. |
| Object | Type the name of the object from which the field value is retrieved. |
| | This is required only if you have selected the parameter value as field. |
| **Action ObjectStores the mapping of the object and its associated actions.** | |
| **Attributes** | **Description** |
| Action Object Name | Type a name for the Action object (User-defined) |
| Action | Select the action you have created in the setup pages |