Quick Action Buttons

Quick action buttons are found at the top right on the pages for Contacts and Accounts, and these are the best way to accomplish many tasks.

Quick Action Buttons for Contacts

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| **Button Name** | **Description** |
| Update Availability | This button is used to add or update related driver's availability. |
| Driver Availability | This button open driver's availability page on the Site staff portal. |
| New Affiliation | This button creates new affiliation record for record type Site on the conatct. |
| New Bill to Affiliation | This button creates new affiliation record for record type Bill to from contact |
| New Account Adjustment | This button creates a new opportunity record for Account adjustment record type from contact. |
| Manifest: Email Today | "Driver Manifest" are sent for today in the Site Portal by using this button. |
| Manifest: Email Tomorrow | "Driver Manifest" are sent for tomorrow in the Site Portal by using this button. |
| Manifest: Email/Edit Tomorrow | "Driver manifests" for tomorrow(next day) can be send using this and before sending the manifests you can edit them. This button is used for site staff portal. |
| Manifest: Email/Edit: Today | "Driver manifests" for same day (today) can be send using this and before sending the manifests you can edit them.This button is used for site staff portal. |
| Manifest: Email Today: Internal | Driver manifests" for same day (today) can be send using this and before sending the manifests you can edit them.This button is used for native salesforce. |
| Manifest: Email Tomorrow: Internal | "Driver manifests" for tomorrow(next day) can be send using this and before sending the manifests you can edit them. This button is used for native salesforce. |
| New Car Donation | This button creates car donation records on the contact. |
| New Car Trade | This button create new opportunity for record type car trade. |
| New Cash or CC Payment | This button create new opportunity for record type Cash Payment. |
| New Recurring Donation | Creates a new Recurring Donation child record. |
| Transfer Credit Flow | This button is used to make money transfers members for same site or different site, transfer to site, transfer to road scholarship. |

Quick Action Buttons for Accounts

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| **Button Name** | **Description** |
| Monthly Statement | This button generates Monthly Statements for the related account on Site Staff Portal. |
| Monthly Statement: Internal | This button generates Monthly Statements for the related account in native salesforce. |
| New Affiliation | Creates new Affiliation child record. |
| New Credit Transfer |  |
| New Donation | This button creates new donation record from the related account. |
| New Grant | This button creates new grant record from the related account. |
| Scholarship Awarded |  |
| New Contact | This button creates New Contact. |
| New Recurring Donation | This button creates New Recurring Donation. |
| New Organization | This button creates New Organization record. |