Salesforce Certified Admin and App Builder

Lesson 8—Workflow Rules

simplilearn

What You'll Learn

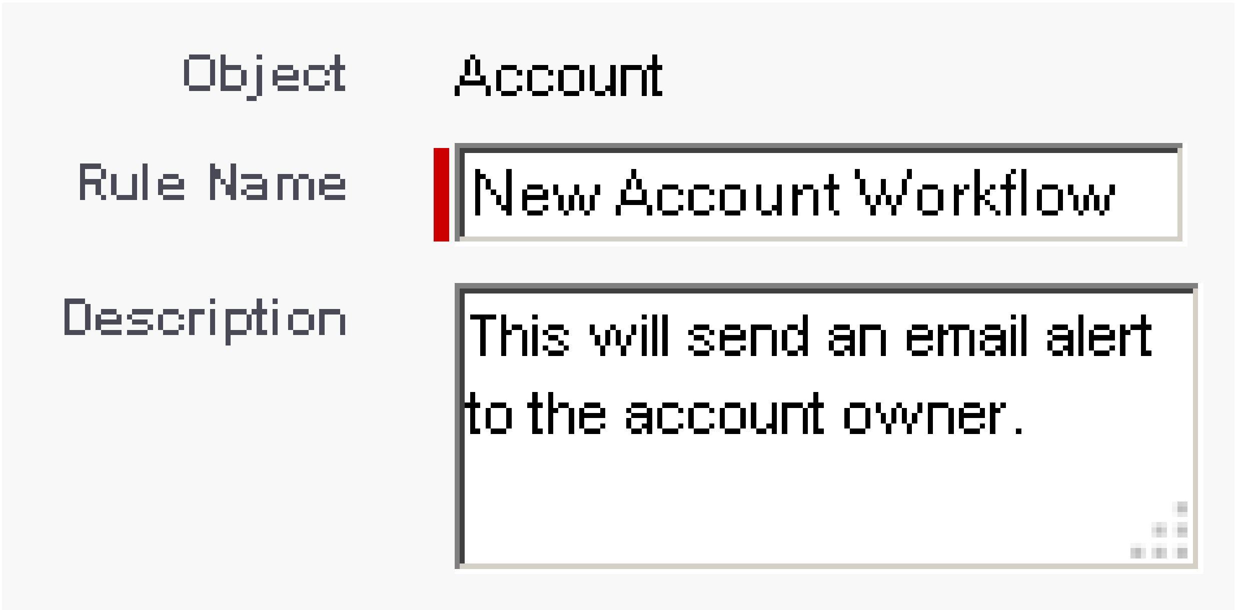
- Creating a Workflow Rule, and a Workflow Rule Field Update
- Creating a Workflow Rule Task Assignment, and a Workflow Rule Email Alert

Creating a Workflow Rule

Creating a Workflow Rule

Steps in creating a workflow rule are as follows:

- Select the object that the workflow rule applies.
- Specify when workflow should be executed.
- Define rule criteria.

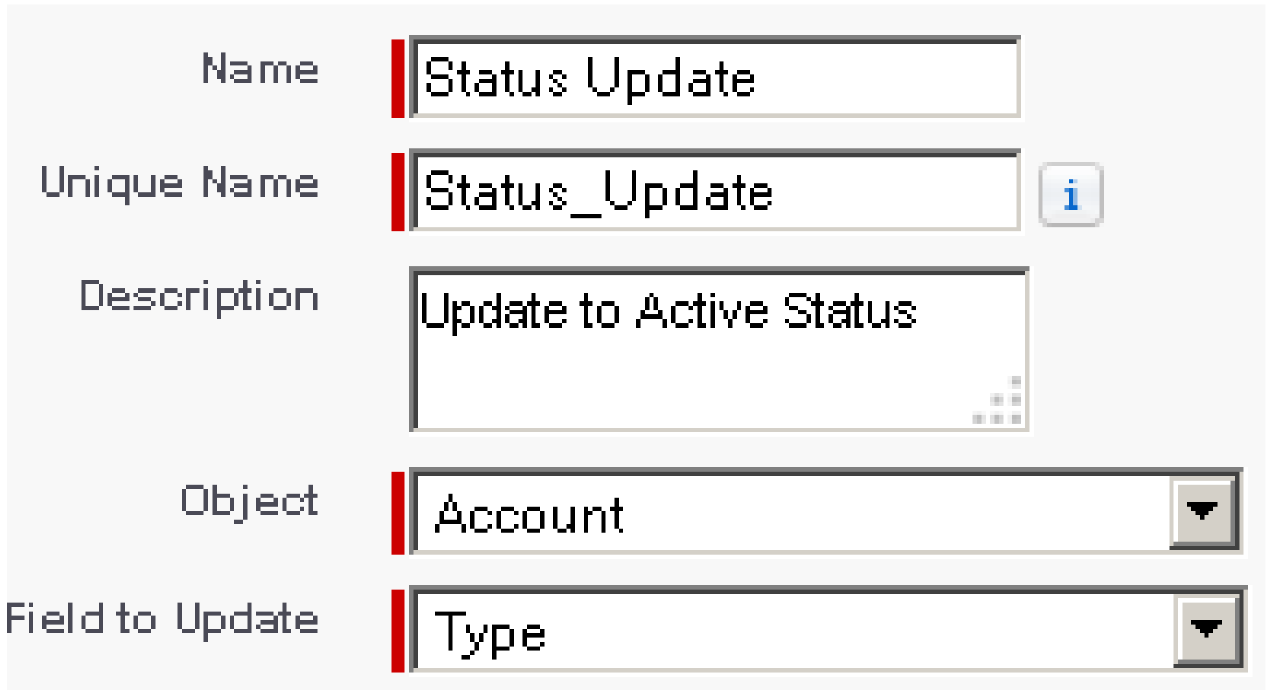


Creating a Workflow Rule Field Update

Creating a Workflow Rule Field Update

Keep in mind the following points:

- Create field updates for standard or custom objects.
- To use a formula, avoid using check boxes or picklist fields because updates based on formulas are not supported for these fields.
- Use the same operators and functions you use for custom formula fields when your field update is based on a formula.
- To replace a field’s value with a blank value, make sure the field is not required.
- Before deleting a field update, check if any workflow rules or approval processes use it.

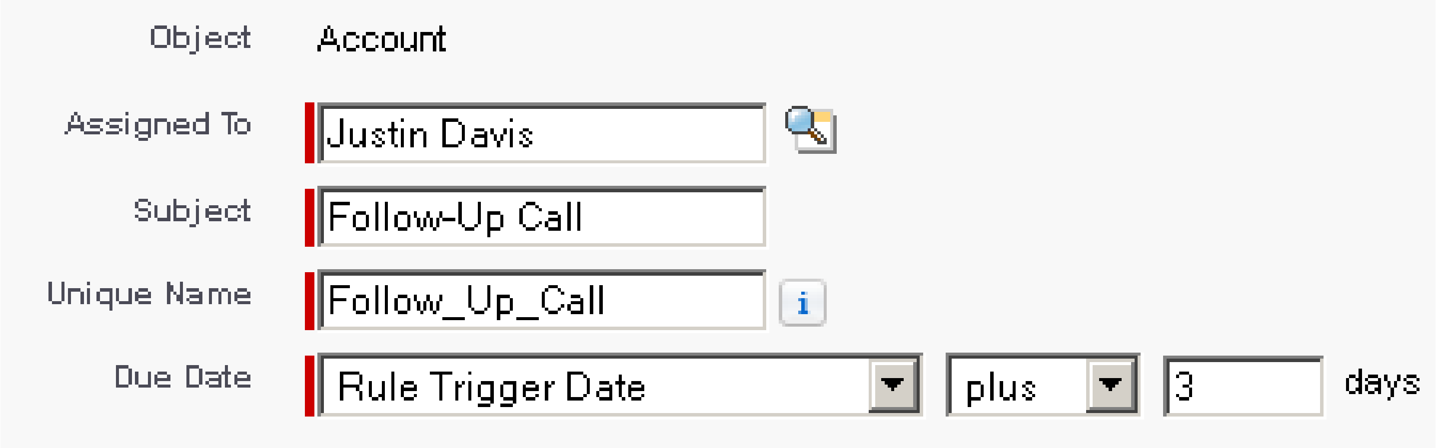


Creating a Workflow Rule Task Assignment

Creating a Workflow Rule Task Assignment

To create a workflow rule to assign a task, you will need to determine the following values:

- Assigned To
- Subject
- Due Date
- Status
- Priority

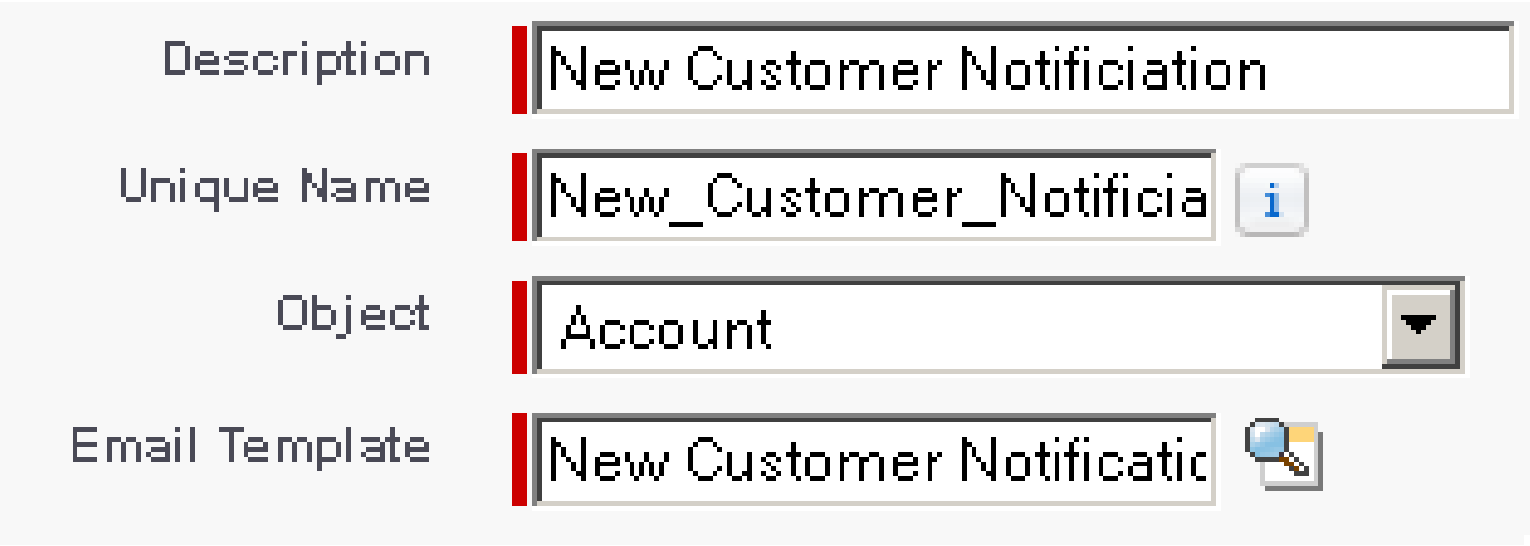


Creating a Workflow Rule Email Alert

Creating a Workflow Rule Email Alert

Remember the following key points when creating an email alert:

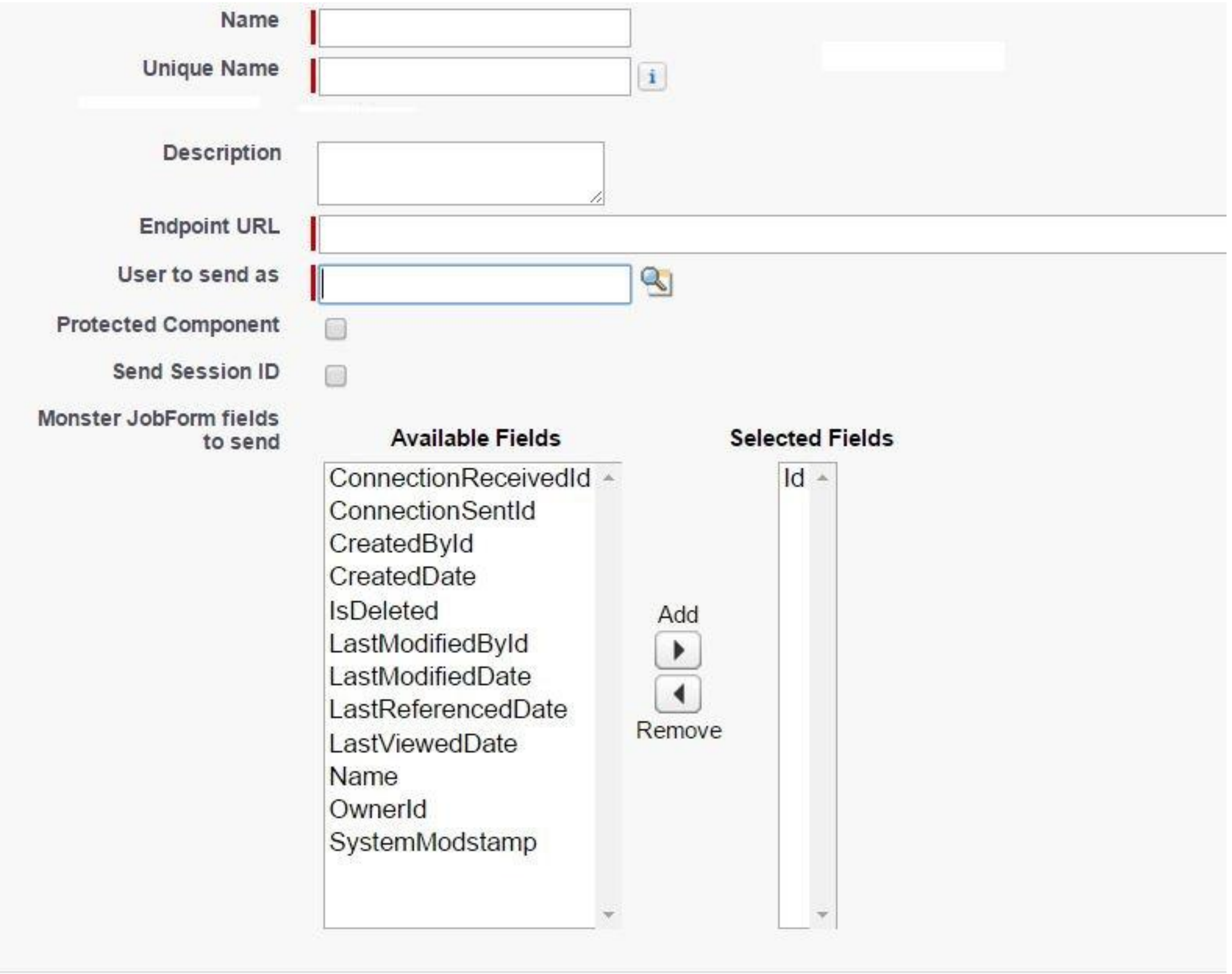
- A Workflow Rule Email Alert sends out an email according to a specified email template.
- Unlike a workflow task that has to be sent to a user of the app, an email alert can be sent to any user or contact as long as they have a valid email address.
- Choose or make your email template.
- Choose the recipients. Up to 5 email addresses can be added to the alert.
- Define when to send the alert.



Outbound Message

Outbound Message

Outbound messaging allows us to mention that, any changes caused to fields in Salesforce can cause messages with field values to be sent to specific external servers. Outbound messaging is a useful part of the workflow rule facility in Salesforce. For example, on adding sales details in Salesforce, we need to send information to the Oracle servers for invoicing.



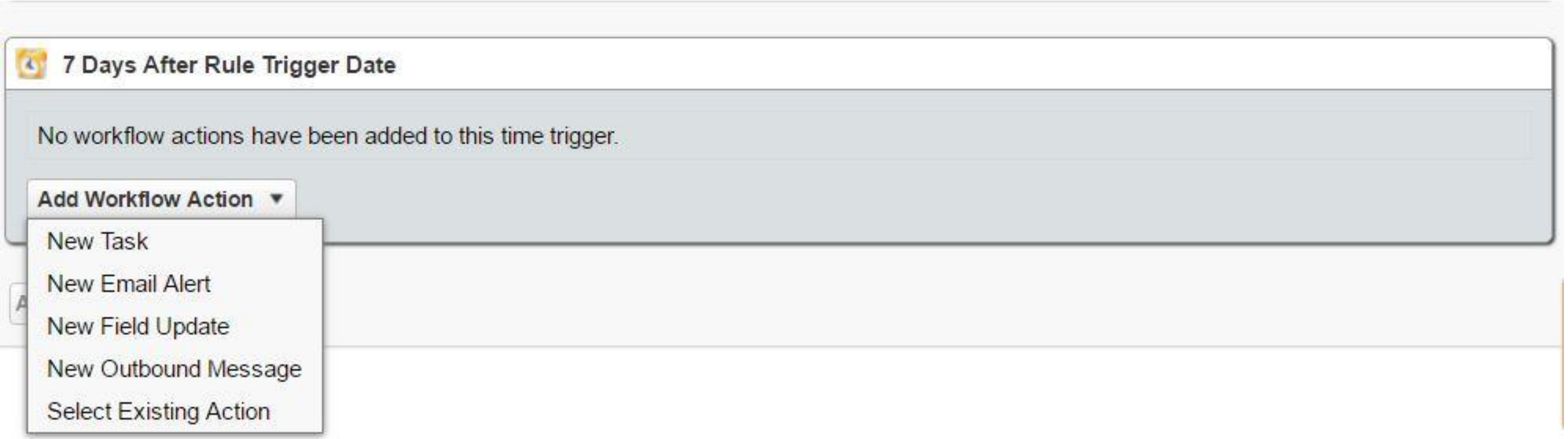
Time-Dependent Workflow Action

Time-Dependent Workflow Action

- Time-dependent actions are queued by Salesforce when the workflow rule matches the given criteria and is implemented. For example, Salesforce can automatically send an email reminder to the opportunity team if an important opportunity is still open ten days before the specified close date.
- This action type is useful for various business scenarios where steps need to be executed at a specified time in future.

Time Dependent Workflow Action—Considerations

- You can set time dependent action for Hours or Days.
- After the specific duration mentioned in Time dependent action, an action can be taken only if the condition still matches.
- For the evaluation criteria “Created, and every time its edited”, you cannot use time-dependent workflow action.



Overview of Approval Process

Overview of Approval Process

01 An approval process is automated and an organization can use it to get records approved in Salesforce

02 It specifies the steps needed for a record to be approved and the individuals responsible for approval at each step

03 A step can apply to all records included in that process or just records that meet certain administrator-defined criteria

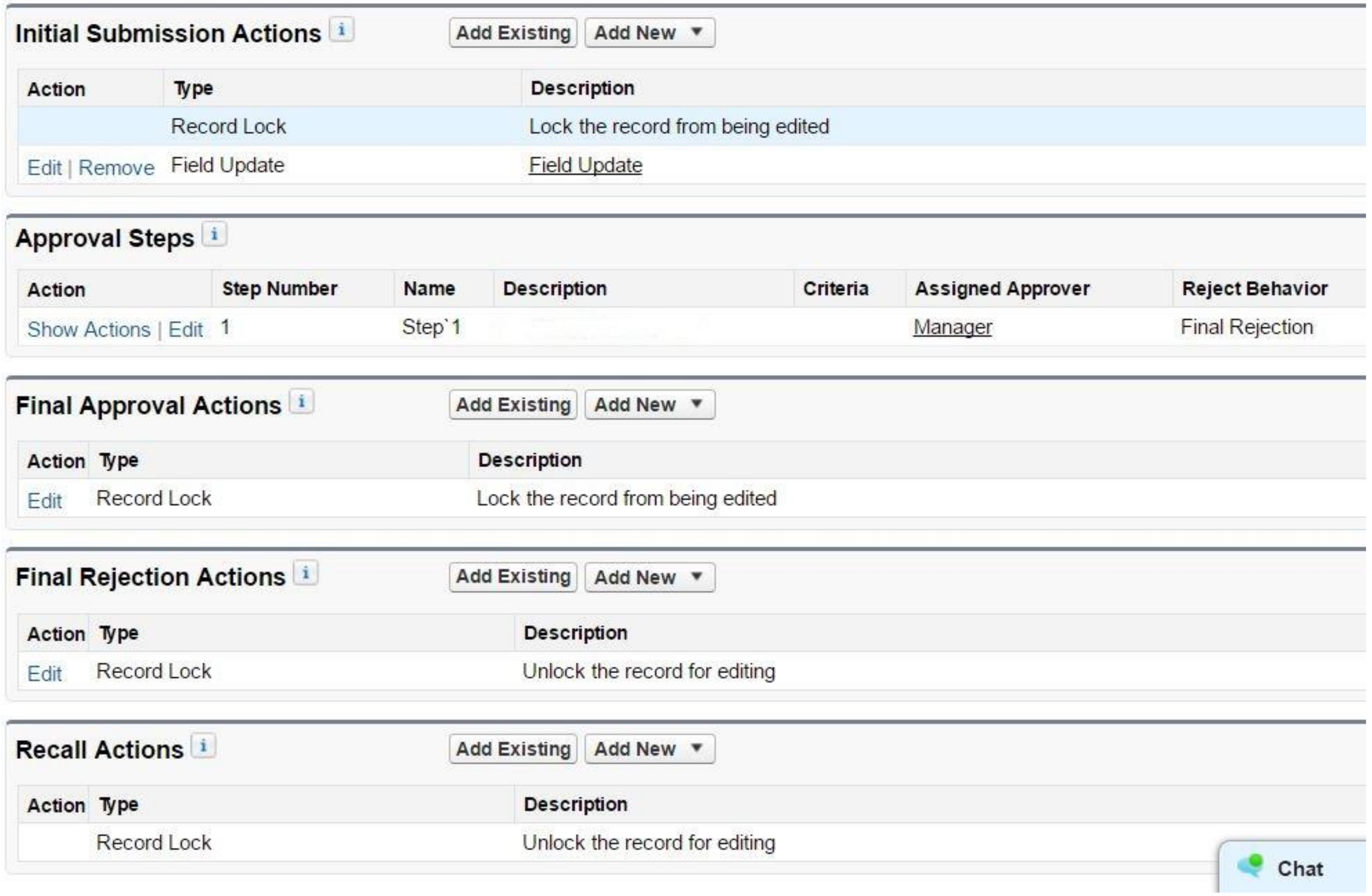
04 An approval process also specifies the actions that need to be taken when a record is approved, rejected, recalled, or first submitted for approval

05 It is used to replace paper-based processes

06 Approvals occur when a user manually starts the process. However, they can be started automatically using the Apex code

Components of an Approval Process

1. Entry criteria: These are conditions that need to be met for a record to be eligible for approval.
2. Steps: These are sub-processes in an approval chain. Each step has its own approval and rejection behavior. Each step can perform any of the four workflow actions. Steps must be assigned to a specific user for approval. Steps can have multiple approvers. The first approval or rejection can require unanimous approval.
3. Final Actions (Approval, Rejection, or Recall): This refers to the action that is taken at the end of the process. Each final action can perform any of the four workflow actions.



Initial Submission Actions — Add Existing | Add New

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit | Remove	Field Update	Field Update

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions | Edit	1	Step`1			Manager	Final Rejection

Final Approval Actions — Add Existing | Add New

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

Final Rejection Actions — Add Existing | Add New

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

Recall Actions — Add Existing | Add New

Action	Type	Description
	Record Lock	Unlock the record for editing


Quiz

QUIZ 1

Which of the following is a true statement regarding Workflow Rules?

a. Workflows are executed when a record is saved or edited

b. Workflow consists of a single step and single action

c. Workflows cannot be modified or deleted

d. Time based workflow can be executed when evaluation is set to, every time a record is created

QUIZ 1	Which of the following is a true statement regarding Workflow Rules?

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The correct answer is a.

Workflows are activated when a record is saved or edited.

QUIZ 2	What should every Workflow Rule be based upon?

a. Record

b. User

c. Component

d. Object

QUIZ

2

What should every Workflow Rule be based upon?

a. Record

b. User

c. Component

d. Object

The correct answer is **d**.

Every workflow rule must be based on a single object you choose when you define the rule.

QUIZ 3

If you assign a task to an opportunity team that has more than 1 member, who receives the task?

a. Each member of the opportunity team

b. The first person listed under the opportunity team

c. No one

d. The owner of the record that triggered the task

QUIZ 3

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a. Each member of the opportunity team

b. The first person listed under the opportunity team

c. No one

d. The owner of the record that triggered the task

The correct answer is **d**.

If you assign a task to an opportunity team role that has more than 1 member, the owner of the record that triggered the task receives it.

QUIZ 4

Which of the following is a true statement regarding Workflows?

a. Workflows cannot be modified or deleted

b. Workflows are activated when a record is saved or edited

c. Workflow consists of a single step and single action

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QUIZ 4

Which of the following is a true statement regarding Workflows?

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d. Time based workflow can be executed when evaluation is set to, every time a record is created

The correct answer is **b**.

Workflows are activated when a record is saved or edited.

Knowledge Check

Scenario | Analysis | Solution

The VP of Sales at United Containers has decided that every lead that is converted to a contact, account and opportunity, needs to have a “Thank You” email sent to the contact. The sales representatives are too busy to attend to this task. This is causing a reduction in sales and repeat business. United Containers needs a way to overcome this problem with an automated email.

Scenario | Analysis | Solution

The VP of Sales understands the concerns of the sales representatives but feels it is very important to make new clients feel good about their decision to do business with their company. United Containers decided to implement Workflow Rules for the following reasons:

1. Emails can be customized with HTML or plain text templates.
2. Emails can go out immediately or on a schedule.
3. Task notifications can be created on contact records to show the email was sent.

Scenario Analysis **Solution**

United Containers performed the following steps to implement Workflow Rules:

1. A new HTML email template was created with the desired “Thank You” content.
2. A new Email Alert was created and linked to this template for Workflow Rule usage.
3. A new Workflow Rule was created with the lead conversion.
4. The Email Alert was added as an immediate action to the Workflow Rule.

Knowledge Check

Scenario Analysis Solution

United Containers offers its customers discounts depending on the amount of product that they purchase. Currently, when a customer reaches a tier when a discount would be offered, the discount is calculated outside of Salesforce and then manually entered into the discount field on the invoice. This is causing problems through human errors during the data entry process. United Containers needs a way to automate this process.

Scenario | Analysis | Solution

United Containers needs to automate their process as they deal in large volumes and manually calculating discounts and entering them into the system is not an efficient use of the staff's time.

United Containers decided to implement Field Updates for the following reasons:

1. Field Updates can be set per User.
2. Field Updates can calculate specific commissions based on dollar amounts.
3. Discounts can be given based on Customer's strategic importance.

Scenario | Analysis | Solution

To resolve this issue, United Containers performed the following steps:

1. Three Field Updates were created to calculate discounts.
2. Three Workflow Rules were created based on specific criteria.
3. The Field Updates were added to the active Workflow Rules.

Key Takeaways

- Workflow Rules can be triggered from record edits.
- Email Alerts, Tasks, and Field Updates are available actions.
- Time-based Workflow Rules can be triggered delayed actions.

This concludes ‘Workflow Rules.’

The next Lesson is ‘Lightning Components.’