Workflow Naming Conventions

All Naming Conventions Are [RFC 2119](#) and [RFC 6919](#) compliant.

Triggers

A trigger **MUST** always be named after what Triggers the workflow, and not the actions. In all cases possible, the number of triggers per object **SHOULD** be limited - reading the existing trigger names allows using existing ones when possible. Knowing that all automations count towards Salesforce alloted CPU time per record, a consultant **SHOULD** consider how to limit the number of workflows in all cases.

1. All Worfklow Triggers MUST contain a Bypass Rule check.

- If more Granularity is needed, a consultant **MAY** want to create a `Hierarchical Custom Setting` to implement the bypass.
- This bypass can be added to the more common User-based bypass, but **SHOULD NOT** supplant it.

2. A Workflow Trigger **SHALL** always start by `WF`, followed by a number corresponding to the number of workflows in the Organization, followed by an underscore. \4*
3. The WorkFlow Trigger name **MUST** try to explain in a concise manner what triggers the WF. Note that conciseness trumps clarity for this field.
4. All Workflows Trigger MUST have a description detailing how they are triggered.
5. Wherever possible, a Consultant **SHOULD** use operators over functions.

Examples

Object	WF Name	Description	WF Rule
Invoice	WF01_WhenInvoicePaid	This WF triggers when the invoice Status is set to "Paid". Triggered from another automation.	`!$User.BypassWF__c && ISPICKVAL(Status__c, "Paid")`
Invoice	WF02_CE_WhenStatusChanges	This WF triggers every time the Status of the invoice is changed.	`!$User.BypassWF__c && ISCHANGED(Status__c)`
Contact	WF03_C_IfStreetBlank	This WF triggers on creation if the street is Blank	`!$User.BypassWF__c && ISBLANK(MailingStreet)`

Field Updates

1. A Workflow Field Update **MUST** Start with `FU`, followed by a number corresponding to the number of field updates in the Organization, followed by an underscore.
2. A Workflow Field Update **SHOULD** contain the Object name, or an abbreviation thereof, in the Field Update Name. \\\\\\\\2*
3. A Workflow Field Update **MUST** be named after the field that it updates, and then the values it sets, in the most concise manner possible.
4. The Description of a Workflow Field Update**SHOULD** give precise information on what the field is set to.

Email Alerts

1. A Workflow Email Alert **MUST** Start with `EA`, followed by a number corresponding to the number of email alerts in the Organization, followed by an underscore.\4
2. A Workflow Email Alert **SHOULD** contain the Object name, or an abbreviation thereof, in the Field Update Name. \\\\\\\2*
3. A Workflow Email Alert's Unique Name and Description **SHOULD** contain the exact same information, except where a longer description is absolutely necessary. \\\\\\\\3*
4. A Workflow Email Alert **SHOULD** be named after the type of email it sends, or the reason the email is sent.

Note that declaratively, the Name of the template used to send the email is always shown by default in Email Alert lists.

> **Examples**
>
> | Object | EA Name | Description |
> | --- | --- | --- |
> | Invoice | EA01_Inv_SendFirstPaymentReminder | EA01_INV_SendFirstReminder |
> | Invoice | EA02_Inv_SendSecondPaymentReminder | EA02_Inv_SendSecondPaymentReminder |
> | Contact | EA01_SendBirthdayEmail | EA01_Con_SendBirthdayEmail. |

Workflow Tasks

1. A Workflow Task Unique Name **MUST** Start with `TSK`, followed by a number corresponding to the number of tasks in the Organization, followed by an underscore.\4
2. A Workflow Task Unique Name **COULD** contain the Object name, or an abbreviation thereof, in the Field Update Name. This is to avoid different conventions for Workflow Actions in general.

Most information about tasks are displayed by default declaratively, and creating a task should rarely impact internal processes or external processes in such a manner that urgent debugging is required. As Users will in all cases never see the Unique Name of a Workflow Task, it is not needed nor recommended to norm them more than necessary.

Outbound Messages

1. An Outbound Message Name **MUST** Start with `OM`, followed by a number corresponding to the number of outbound messages in the Organization, followed by an underscore.\4
2. An Outbound Message Name **COULD** contain the Object name, or an abbreviation thereof, in the Field Update Name. This is to avoid different conventions for Workflow Actions in general.
3. An Outbound Message **MUST** be named after the Service that it send information to, and then information it sends in the most concise manner possible.
4. The Description of An Outbound Message **SHOULD** give precise information on why the Outbound Message is created.
5. Listing the fields sent by the Outbound Message is **NOT RECOMMENDED**.

Examples

Object	OM Name	Description
Invoice	OM01_Inv_SendBasicInfo	Send the invoice header to the client software.
Invoice	OM02_Inv_SendStatusPaid	Sends a flag that the invoice was paid to the client software.
Contact	OM01_SendContactInfo	Sends most contact information to the internal Directory.

\1 This is also the default Salesforce setting.* \2 While Field Updates are segregated by Object when viewed through an IDE or through code, the UI offers no such ease of use. If this is not done, a consultant **WOULD PROBABLY** create list views for field updates per Object.* \3 Email Alert's Unique Names are generated from the Description by default in Salesforce. As Email Alerts can only send emails, this convention describes a less exhaustive solution than could be, at the profit of speed while creating Email Alerts declaratively.* \4 Numbering is done for easier referencing, and not for limits checking.. If a WF is deleted, continue numbering as if it had not been. The objective here is to be able to say "can you debug WF21" to a coworker, rather than "yeah that one workflow on contacts which triggers when you set that checkbox to true. No, the other one."*