# Development: Implementing Business Processes

Lesson 14: Automating Processes with Workflow
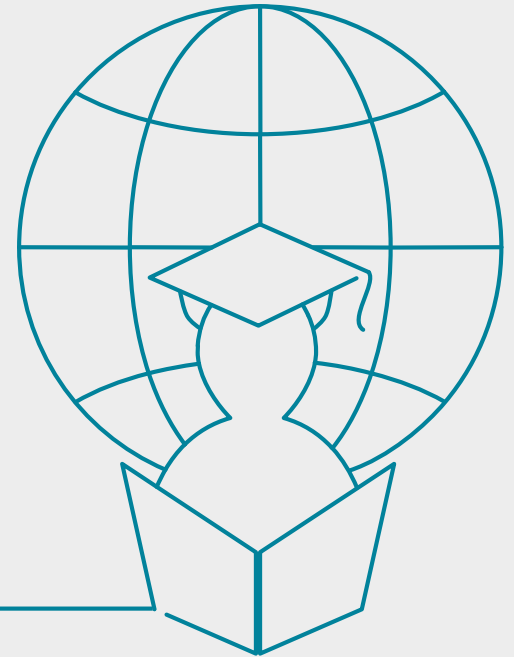
By the end of this lesson, you will be able to:
- List the actions that can be triggered by a workflow rule
- Describe the difference between time dependent and immediate workflow actions
- Create an escalation channel using time-dependent workflow
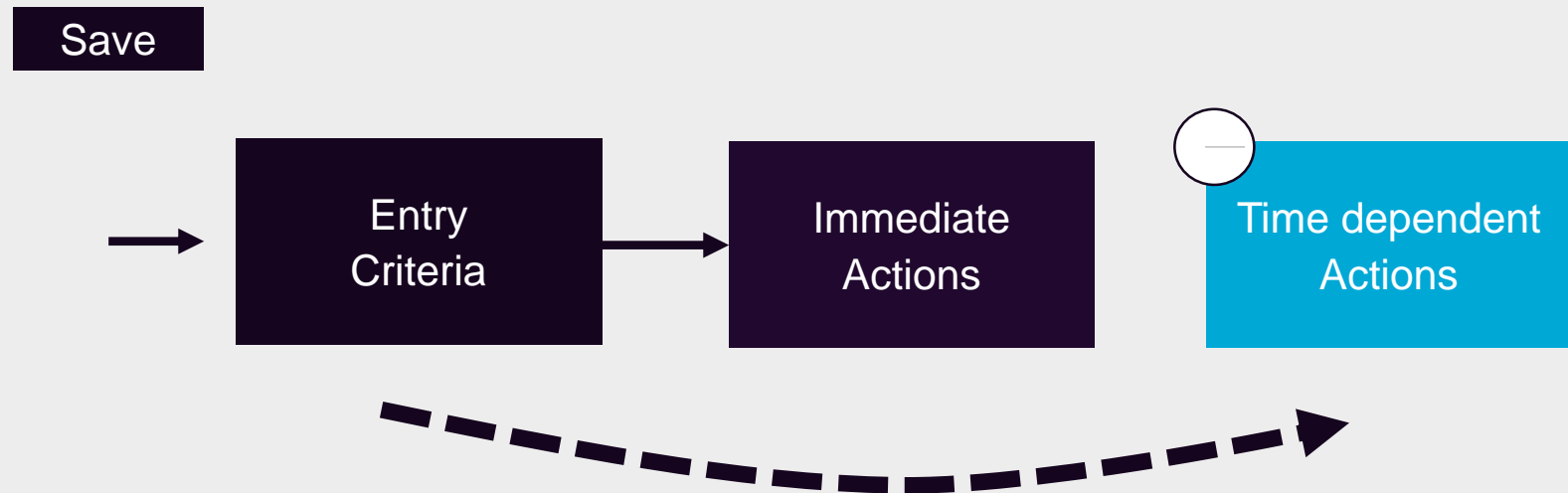- Describe use cases for workflow

# Workflow Rules

Automate business processes
Trigger on record write or update
Execute actions
- Immediately and/or
- Later (only if record still meets entry criteria)
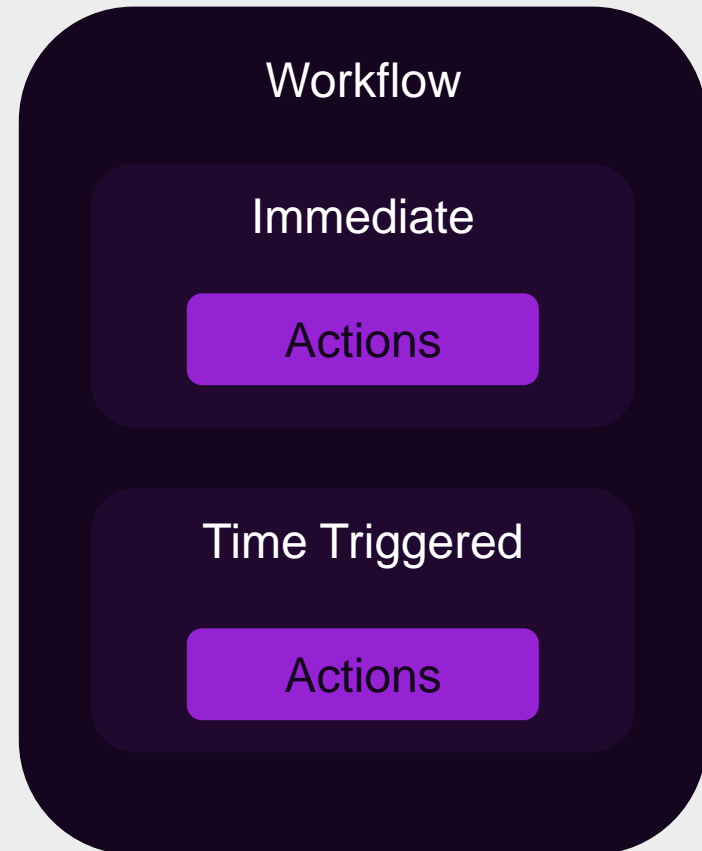
# 14.1: Workflow Rules
## Workflow Rule Configuration

Entry criteria: which records
- Object type
- Evaluation Criteria
- Rule Criteria

Timing: when to execute actions
- Immediately
- Time Dependent
- Actions: what to do
- Assign Task
- Update Field
- Send Email Alert
  - From current user's email address
  - From organization-wide email
- Post Outbound SOAP Message

Workflow

Immediate

Actions

Time Triggered

Actions

## 14.2: Time Dependent Workflow Rules
## What is Time-Dependent Workflow?

Workflow actions

Immediate: actions fire as soon as a record meets the criteria

Time dependent: actions fire based on elapsed time (evaluated off of any date field in Salesforce)

- Time-dependent actions have a time trigger
- With time-dependent actions, the action is queued to fire as soon as the workflow criteria is met; however, the action will not occur until it meets the time trigger

## 14.2: Time Dependent Workflow Rules
## Time-Dependent Workflow Considerations

Time-dependent workflow cannot be used when a rule is set to be evaluated Every time a record is created or updated

When a new workflow rule is created, it does not affect existing records

Developers can monitor and remove pending actions by viewing the time-dependent workflow queue

If a record that has an action pending against it in the time-based workflow queue is modified so that the record no longer meets the criteria, or the timing changes, the action will be updated in the queue

## 14.2: Time Dependent Workflow Rules
## Time-Dependent Workflow Use Cases

If the status of the offer is Sent for more than 2 days, assign a task to the owner of the offer reminding them to follow up
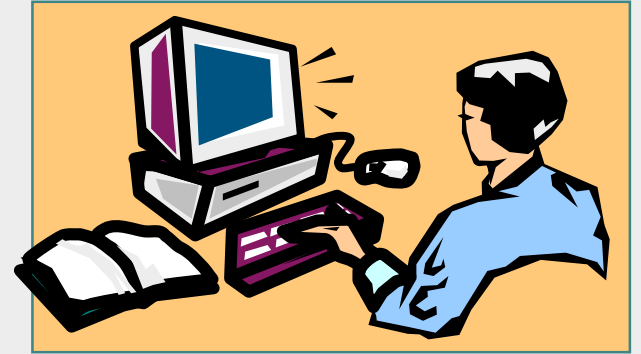
If the number of interviewers associated with the position is zero for more than 30 days after the position is created, send an email to the hiring manager

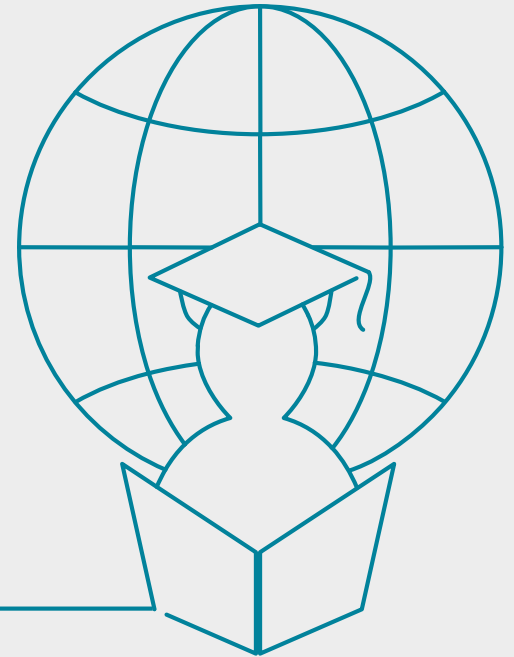If a critical position remains in an Open status for more than 14 days assign a task to the owner

## Demo

Setting up time dependent workflow

# Summary

Automate business processes
Time-Dependent Workflow
Time-Dependent Workflow Considerations

# Module Review

What are the four actions that can be associated with a workflow rule?

Time-Dependent workflow can be used when a workflow rule is set to evaluate "Every time a record is created or updated"

  True or False

The only way to test whether a time-dependent workflow rule is executing as expected is to wait

  True or False