



WORKFLOW: AUTOMATING THE PROCESS

Summary

Your company operates more efficiently with standardized internal procedures and automated business processes. Set up Salesforce to automatically perform these procedures and processes based on your organization's workflow.

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Begin by designing workflow actions. Then configure workflow rules and approval processes that determine the conditions under which Salesforce executes the actions.

Creating Workflow Tasks

Workflow tasks assign a new task to a user, role, or record owner. For example, automatically assign follow-up tasks to a support representative one week after a case is updated.

To get started with workflow tasks, from Setup, enter *Tasks* in the **Quick Find** box, then select **Tasks**.

- The type of record you choose determines the rules that you can associate with the workflow task. Workflow tasks can only be associated with workflow rules or approval processes for the same type of record: contact, account, lead, and so on.
- If you assign a workflow task to an opportunity team role containing more than one person, the owner of the record that triggered the rule becomes the task assignee.
- If a workflow task is assigned to a role containing more than one person, the owner of the record that triggered the rule becomes the task assignee.
- Workflow tasks assigned to an empty role are reassigned to the person who triggered the rule.
- Distinguish your workflow-generated tasks from other tasks by starting the subject with some workflow notation.
- Before deleting a workflow task, check if any workflow rules or approval processes are using it.
- Avoid assigning workflow tasks to roles with multiple users.

Creating Email Alerts

Email alerts send an email to one or more recipients you specify. For example, automatically send sales management an email alert when a sales representative qualifies a large deal.

To get started with workflow alerts, create email templates for your workflow alerts, then from Setup, enter *Email Alerts* in the **Quick Find** box, then select **Email Alerts**.

- Add additional recipients that are not Salesforce users, leads, or contacts.
- Specify which template the email alert uses.
- Unlike workflow tasks, workflow alerts that are set up to email a role occupied by more than one person will send an email to each person in that role.
- Insert a link to a case or opportunity using merge fields in email templates.

Best Practices

- Before deleting a workflow alert, check if any workflow rules or approval processes are using it.
- Create a standardized letterhead to use for all the email templates you use for workflow alerts.

Defining Field Updates

Field updates change the value of a field. For example, automatically change the `Owner` field on a contract three days before it expires.

To get started with field updates, from Setup, enter *Field Updates*. in the *Quick Find* box, then select **Field Updates**.

- Create field updates for standard or custom objects.
- To use a formula, avoid choosing a checkbox or picklist field because updates based on formulas are not supported for these field types.
- 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.

Defining Outbound Messages

Outbound messages send a secure configurable API message in XML format to a designated listener. For example, automatically initiate the reimbursement process for an approved expense report by triggering an outbound API message to an external HR system.

To get started with outbound messages, from Setup, enter *Outbound Messages* in the *Quick Find* box, then select **Outbound Messages**.

- If you do not see these options, your organization may not have outbound messaging enabled. Contact Salesforce to enable outbound messaging.
- You can include the session ID in your outbound message.
- Create outbound messages for standard or custom objects.
- Outbound messages are sent as a Salesforce user. Determine the user to use when sending your outbound message.

Defining Flow Triggers

A *flow trigger* is a workflow action that launches a flow. With flow triggers, you can automate complex business processes—create flows to perform logic, and have events trigger the flows via workflow rules—without writing code. For example, your flow looks up and assigns the relevant entitlement for a case. Create a flow trigger to launch the flow whenever a case is created, so that all new cases are automatically set with a default entitlement.

To get started with flow triggers, from Setup, enter *Flow Triggers* in the *Quick Find* box, then select **Flow Triggers**.

- Flow triggers are available only for workflow rules. You can't use them as actions elsewhere, for example, in approval processes.
- Flow triggers are available on most—but not all—objects that are supported by workflow rules.
- Only active, autolaunched flows can be launched by flow triggers. However, if a flow trigger is in test mode, administrators run the latest flow version while other users run the active flow version.
- If a flow trigger fails at run time, the user who created or edited the record to meet the workflow rule criteria won't be able to save the record.

Best Practices

- Avoid associating more than one field update with a rule or approval process that applies different values to the same field.
- Before you begin, check the type of the field you want to update. Read-only fields like formula or auto-number fields are not available for field updates.

Best Practices

- Before deleting an outbound message, check if any workflow rules or approval processes use it.
- Give outbound messages a description that makes it easy for other users to tell what it does.

Pilot

The Process Builder has superseded flow trigger workflow actions, formerly available in a pilot program. Organizations that are using flow trigger workflow actions can continue to create and edit them, but flow trigger workflow actions aren't available for new organizations.

- Flow triggers aren't available as time-dependent workflow actions. You can add flow triggers to workflow rules only as immediate workflow actions.

Creating Workflow Rules

Workflow rules schedule and execute workflow actions when records meet specified criteria. For example, automatically send an email alert to the account team of a high-value opportunity ten days before its close date, or assign follow-up tasks to a support representative two hours after a case is updated.

To get started with workflow rules, from Setup, enter *Workflow Rules* in the **Quick Find** box, then select **Workflow Rules**.

- Specify the criteria that determine when Salesforce executes the workflow rule. Any change that causes a record to match this criteria can trigger the workflow rule—even changes to hidden fields.
- Saving or creating records can trigger more than one rule.
- Your sharing model may prevent users from viewing records associated with workflow tasks.
- To configure a workflow rule with scheduled actions, add time triggers and associate actions with them. The associated actions are time-dependent, executing according to the time trigger when a record matches the workflow rule criteria.
- You can add time triggers to a workflow rule if all of the following are true:
 - The evaluation criteria is not set to **Evaluate the rule when a record is: created, and every time it's edited**.
 - The rule is inactive.
 - The rule does not have pending actions in the workflow queue.

Best Practices

- Before configuring workflow rules, from Setup, enter *Process Automation Settings* in the **Quick Find** box, select **Process Automation Settings**, and then set the default workflow user.
- To monitor pending time-dependent actions and cancel them if necessary, from Setup, enter *Time-Based Workflow* in the **Quick Find** box, then select **Time-Based Workflow**.

Creating Approval Processes

Best Practices

- Design workflow actions so that you can use them for both workflow rules and approval processes.
- Before you begin creating an approval process, draw a diagram of the steps in your approval process.
- Test your approval process in your Salesforce Sandbox before activating it.
- Clone processes to create similar ones more quickly.
- Educate your users on the criteria a record must meet to be submitted. Salesforce displays an error message when users click **Submit** if the record does not apply to any active processes.
- After creating approval processes, use the graphical Process Visualizer to visualize and understand the defined flow and decisions.

Create simple or sophisticated multi-step approval processes that automate any authorization process in your company, such as expense reports, vacation requests, and discount requests.

To get started with approval processes, from Setup, enter *Approval Processes* in the **Quick Find** box, then select **Approval Processes**.

- Approval processes are different from workflow rules in that users must submit a record for approval whereas workflow rules fire when their conditions are met.
- Each approval process specifies the steps necessary for a record to be approved and who must approve it at each step.
- A step can apply to all records included in the process, or just records that have certain attributes.

Use the Process Visualizer to:

- Display a flow chart of each saved approval process.
- Improve communication about the approval process and gain buy-in from step owners.
- Reinforce your company's policies by documenting the decisions you reached when the approval process was designed.
- Print an annotated version of the approval process, where numbers added to the diagram correspond to details in a table, which is included in the printable view.
- Share approval process diagrams by saving annotated versions as PDF files (requires an Adobe® PDF print driver).
- Quickly locate key details by searching multi-step or complex diagrams for matching text.
- Visualize and understand graphically:
 - The steps necessary for a record to be approved.
 - The designated approvers for each step.
 - The criteria used to trigger the approval process.
 - The specific actions to take when a record is approved, rejected, recalled, or first submitted for approval.