Salesforce Time-based Workflow caveats

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Jun 12, 2017 · 2 min read

Time-based workflow can be frustrating and counter-intuitive sometimes. Hopefully this article will calm your nerve down a bit when it did not behave as expected.

1. Why isn't my Time-based workflow firing on records that meet the criteria?

Time-based workflow fires only on records created or updated after the workflow is activated. Do not expect them to work on existing records with no changes.

2. Why is my scheduled action executed after my workflow is deactivated?

Scheduled actions are still in the queue even if the workflow becomes deactivated. Your email, task and other actions will still be performed when the time comes, as long as the criteria for execution still hold true.

However, if the scheduled actions no longer meet the executing criteria, they will not be executed.

3.How to delete scheduled actions from a time-based workflow

You can manually delete any scheduled actions by going to monitor -> time-based workflow. Find the action and hit delete.

You can also delete scheduled actions by editing the record, so that it will no longer meet the execution criteria.

4. How can I change the timing on existing time-based workflow?

You can't change the timing directly on an active workflow. You have to make it inactive, remove the action from the original timing, add the new timing and action.

5. What can I change on an active time-based workflow?

You can change the workflow criteria.

You can also edit the actions on the workflow. Be aware if the action is shared with other workflows, though. Your change may cause un-intended impacts. Even if your action is not associated with any active workflow, it may be used in an inactive workflow with pending actions.