

Salesforce Workflows Interview Questions and Answers for Freshers and Experienced

1.What is Workflow?

Salesforce Workflow is a business logic that evaluates the records as they are created, updated in an object to apply automated process like Assigning Tasks, Emails, Field Update and outbound message sending.

2. In which object workflows are stored?

Workflow

3.Different Workflow Components available in salesforce?

In salesforce.com. workflow consists of 5 components they are,

Workflow rules.

Workflow tasks.

Workflow Email alerts.

Workflow field updates.

Workflow Outbound messages

4.Different evaluation criteria of workflow?

Created

Created and every time it's edited

Created and every time it's edited to meet the subsequently criteria

5.What are the different workflow actions available in Salesforce?

Tasks.

Email alerts.

field updates.

Outbound messages

6.What is a Workflow Task?

Workflow tasks in salesforce are used to assigns a task to users. Using tasks we can specify the Subject, Status, Priority, and Due Date of the task. Tasks are workflow & approval actions that are triggered by workflow rules or approval processes.

7.What is a Workflow Alert?

Email alert is one of the action used in workflow and approval. They are used to generate email template by a workflow rule or approval process and sent to destination recipients. We can send workflow email alerts to users, contacts having an valid email address.

8.What is a Workflow Field Update?

Field updates in workflow and approval processes specifies the field that we want updated and inserting the new value for it. Depending on the field type, we can choose the following options. They are apply a specific value, make the value blank, or calculate a value based on a formula you create.

9.What is the difference between Created and everytime edited to meet the criteria and Created and edited to subsequently meet the criteria?

Ans: If we select 'Created and everytime edited to meet the criteria' whenever we create a record or edit a record if the criteria of the workflow rule meets then it will trigger every time. If we select 'Created and edited to subsequently meet the criteria' -

While creating the record criteria meets so that workflow will fire and while editing the record again criteria meets workflow won't fire (meeting the criteria to meeting the criteria)

While creating the record criteria doesn't meet so workflow won't fire and while editing the record workflow criteria meets then workflow will fire (not meeting the criteria to meeting the criteria)

Conclusion: Previous state of record should be not meeting criteria and current state of record should be meeting the criteria then only in current state workflow will fire.

10.What are the types of rule criteria's?

Ans: 1.Criteria meet (field - operator - value, if there are multiple criteria's then in filter criteria we can give conditions like (1 or 2) and 3, field to field comparison is not possible, we can't fetch the previous state information of the field)

2.Formula evaluated (we can write formulas with this we can do field to field comparison and we can fetch previous state value of the record)

11. What is immediate workflow action?

Ans: The action which will be performed immediately after the record criteria meets.

12.What is Time-Dependent Workflow?

- execute time-sensitive actions before or after any date on the record
- perform a series of actions at various points in time
- use the Workflow Queue to manage all pending actions Use Time-Dependent workflow to
- send an email reminder to an account team if a high-value opportunity is still open ten days before the close date
- notify the VP of sales if a high value opportunity close date is fast approaching and it has not been closed
- pro-actively notify support rep if an open case with Platinum Support SLA has not been worked for a period of time and take action before the case escalates

13.Time-Dependent Workflow – Considerations

Maximum of 10 time triggers per rule

Maximum of 40 actions (10 x 4 types) per time trigger, and 80 actions per workflow rule

Workflow default user must be set up before creating time-based rules

Precision limited to hours or days

Cannot convert leads with time-dependent actions in the Workflow Queue

Time triggers cannot be added to or removed from activated workflow rules

Not possible to create a time-dependent action associated to a rule with a trigger type of Every time the record is created or updated

14.Limitations of Time-dependent workflow?

When defining time dependent workflows in salesforce we have to use standard and custom date and date/time fields defined for the object.

We have to specify time using days and hours.

Also add actions to existing time triggers.

15.In which criteria of a workflow – “time dependent workflow action” cannot be created?

Created, and every time it's edited. Because, unnecessary there will be lots of requesting pending in time based workflow queue whenever record is edited.

16.When you can't add Time dependent action in Workflow rule?

Time dependent actions in workflow rules can not be added when the following actions takes place.

When workflow rule is active.

When workflow rule is deactivated and has pending actions in the queue.

When the workflow rule criteria of a record is set to: created, and every time it's edited.

When the workflow rule is included in a package.

17. How can you monitor future actions of time based workflow?

Ans: setup --> administration set up --> monitoring --> time based workflow

18. We have a “Time Based Workflow” and there is Action scheduled to be executed. If we Deactivate the workflow, Scheduled actions will be removed from queue or not?

Even after deactivating the workflow, its action will not be removed. It's still active in queue and will execute on scheduled time.

19. We have “Time Based Workflow” and there is action scheduled to be executed. Can we delete that workflow?

It is not possible to delete the workflow when the workflow is having any pending time dependent actions.

20. How to clear the Time based workflow action queue?

We can clear time based workflow action queue in two ways they are,

Make the criteria false.

Removing scheduled actions from the queue.

21. While creating workflow on Task, what difference observed on available actions?

While creating workflow on task we can not find “Send Email” action.

22. Suppose if a record meets workflow criteria for time based workflow action, the action goes in queue. Later, before the time based action is triggered, the same record gets modified and the criteria previously met is changed and now it does not meet the workflow criteria. What happens to the time based action placed in Queue?

In this case, pending action in the time based workflow will execute on scheduled time and before taking any action, it will check the condition that was given in workflow rule (Rule Criteria), and if condition does not meet, then no action will be taken and simply removed from the queue.

23. Tell us the things that we can do in workflow and not in the trigger

Ans: Time dependent workflow

24. Workflow vs Process Builder

Process Builder can update any field on any related record, where Workflow can only update some fields on a parent record of a Master-Detail relationship.

Process Builder can perform DML operation but workflow can not.

25. As we know that, in time based workflow, we can take action based on hour or day? What if I have to take action after 5 minutes of record is created.

This is not possible directly. But we can use here a technique.

Create a formula field on object which will calculate time after 5 min of created date.

Formula will be **Now() +0.00345** and then chose this formula field in time based workflow with 0 hours.

This will work.

Find below table,

Value in Formula	Minutes Ago		Will Fire In	
0.04145	60	Minutes	0	Minutes
0.03800	55	Minutes	5	Minutes
0.03455	50	Minutes	10	Minutes
0.03109	45	Minutes	15	Minutes
0.02764	40	Minutes	20	Minutes
0.02418	35	Minutes	25	Minutes
0.02073	30	Minutes	30	Minutes
0.01727	25	Minutes	35	Minutes
0.01382	20	Minutes	40	Minutes
0.01036	15	Minutes	45	Minutes
0.00691	10	Minutes	50	Minutes
0.00345	5	Minutes	55	Minutes
0.00069	1	Minute	59	Minutes
0.04145	60	Minutes	0	Minutes

0.03800	55	Minutes	5	Minutes
0.03455	50	Minutes	10	Minutes
0.03109	45	Minutes	15	Minutes
0.02764	40	Minutes	20	Minutes
0.02418	35	Minutes	25	Minutes
0.02073	30	Minutes	30	Minutes
0.01727	25	Minutes	35	Minutes
0.01382	20	Minutes	40	Minutes
0.01036	15	Minutes	45	Minutes
0.00691	10	Minutes	50	Minutes
0.00345	5	Minutes	55	Minutes
0.00069	1	Minute	59	Minutes

26.Difference between Trigger and Workflow?

Workflow :

Workflow is automated process that fired an action based on Evaluation criteria and rule criteria.

We can access a workflow across the object.

DML operation are not performed in workflow.

We can not query from database.

Workflow always fire on after event of record.

Trigger :

Trigger is a piece of code that executes before and after event of record.

We can access trigger across the object and related to that object.

27. For the same scenario explained in the above question what happens when we deactivate or modify the criteria of the workflow to different criteria? Whether the field will be updated or not in scheduled date?

Ans: Yes, It will trigger in scheduled date.

28. Scenario: There are two workflow rules on the same object say namely wf1 and wf2. If wf1 fires then a field will be updated on the same object, if the field updated and due to this wf2 criteria meets then what will happen, wf2 will fire or not?

It won't fire. To fire wf2 we should enable 'Re-evaluate Workflow Rules' checkbox of the field update which is there in wf1.

29. What is recursive workflow rule? How to avoid recursive workflow rules?

Whenever we enable Re-evaluate Workflow Rules after Field Change checkbox in the Field Update of a workflow rule, due to this field update other workflow rules on the same object will be fired if the entry criteria of those workflow rules satisfied.

Incase, in other workflow rules also if we enable Re-evaluate Workflow Rules after Field Change checkbox in the Field Update recursive workflow rules will come in some scenarios.

We can take two steps to avoid recursive workflow rules -

For the workflow Evaluation Criteria if you choose created, and any time it's edited to subsequently meet criteria option, we can avoid recursive workflow rules.

If you don't enable Re-evaluate Workflow Rules after Field Change checkbox in the Field Update of a workflow rule we can avoid.

30. A workflow already exists on object. Now user want to add time dependent workflow action to it but not able to get an option to select time dependent action. What might be issue?

OR

When The Add Time Trigger button is unavailable?

The evaluation criteria is set to Evaluate the rule when a record is: created, and every time it's edited.

The rule is activated.

The rule is deactivated but has pending actions in the workflow queue.

31. What are the types of email templates?

Ans: 1. Text

2. HTML (with letter head)

3. Custom HTML (without letter head)

4. Visual Force

32. Difference between Process Building and Trigger.

Process Builder	Trigger
Process Builders cannot handle before DML. It executes after a record has been created or updated.	Apex triggers can handle both before and after DML operations.
Process Builder cannot handle delete and undelete DML.	Whereas Apex triggers can handle all DML operations.
An error reported in Process Builder is more generic which makes it difficult to find the origin of the error.	With Apex triggers, exception handling can be made more specific.
It is all or none in case of Process Builder failure.	With Apex triggers, partial success is possible.
It cannot update unrelated records.	With Apex Triggers, you can update unrelated records.
You have to use process builder in conjunction with flows to create custom record sharing.	Share records with more complex criteria than Sharing Rules permits.
Process builder doesn't support GroupMember object, the flow supports the "GroupMember" object.	Add/remove users in Chatter Groups and Public Groups.
Can't create email templates that pull info from multiple records and object combined solely by using process builder.	Create email templates that pull info from multiple records and Objects (combined with Visualforce).