

## Configuring time based workflows in Salesforce

Workflow is one of the most powerful tools available in Salesforce. It helps to automate various business processes. Workflow allows you to Update a field, Create a task, send an Email-Alert and Outbound message based on some criteria. In Salesforce workflow actions are of two types

- **Immediate Action:** Immediate actions execute, the moment when the criteria is met.
  - **Time-Dependent Action:** Time-Dependent actions execute at a specific time defined by you, such as sending an Email alert after 24 hours of lead creation if the lead is not contacted. When the specified time passes, workflow rule re-evaluates to check that record still meets the rule criteria.
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## Steps to configure time-based workflows within Salesforce

In this article, we are going to see Time-Dependent action for workflow. The requirement is that an email alert should be sent to opportunity owner, 15 days before the opportunity closing date. Let's create a time-based workflow for above requirement. Following are the steps to be followed to meet the above requirement.

1. Creating an Email Template.
2. Creating an Email Alert.
3. Creating a Workflow.



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## Step 1: Creating an Email Template

Below are the steps to Create Email Template

- Navigate to Setup->Communication Templates->Classic Email Templates

New Template						
ID	Template Name	Template Type	Is Active	Description	ID	Is Active
1001	Template 1: Basic Template	100	<input checked="" type="checkbox"/>	Template 1: Basic Template	1001	<input checked="" type="checkbox"/>
1002	Template 2: Basic Template	100	<input checked="" type="checkbox"/>	Template 2: Basic Template	1002	<input checked="" type="checkbox"/>
1003	Template 3: Basic Template	100	<input checked="" type="checkbox"/>	Template 3: Basic Template	1003	<input checked="" type="checkbox"/>
1004	Template 4: Basic Template	100	<input checked="" type="checkbox"/>	Template 4: Basic Template	1004	<input checked="" type="checkbox"/>
1005	Template 5: Basic Template	100	<input checked="" type="checkbox"/>	Template 5: Basic Template	1005	<input checked="" type="checkbox"/>
1006	Template 6: Basic Template	100	<input checked="" type="checkbox"/>	Template 6: Basic Template	1006	<input checked="" type="checkbox"/>
1007	Template 7: Basic Template	100	<input checked="" type="checkbox"/>	Template 7: Basic Template	1007	<input checked="" type="checkbox"/>
1008	Template 8: Basic Template	100	<input checked="" type="checkbox"/>	Template 8: Basic Template	1008	<input checked="" type="checkbox"/>
1009	Template 9: Basic Template	100	<input checked="" type="checkbox"/>	Template 9: Basic Template	1009	<input checked="" type="checkbox"/>
1010	Template 10: Basic Template	100	<input checked="" type="checkbox"/>	Template 10: Basic Template	1010	<input checked="" type="checkbox"/>
1011	Template 11: Basic Template	100	<input checked="" type="checkbox"/>	Template 11: Basic Template	1011	<input checked="" type="checkbox"/>
1012	Template 12: Basic Template	100	<input checked="" type="checkbox"/>	Template 12: Basic Template	1012	<input checked="" type="checkbox"/>
1013	Template 13: Basic Template	100	<input checked="" type="checkbox"/>	Template 13: Basic Template	1013	<input checked="" type="checkbox"/>
1014	Template 14: Basic Template	100	<input checked="" type="checkbox"/>	Template 14: Basic Template	1014	<input checked="" type="checkbox"/>
1015	Template 15: Basic Template	100	<input checked="" type="checkbox"/>	Template 15: Basic Template	1015	<input checked="" type="checkbox"/>

- Click on "New Template" button. Below screen will be shown

New Template

New Template

New Template

New Template

New Template

New Template

New Template

New Template

- Choose the type of the template you would like to create. Here I'm selecting "Text" email template.
- Click on "Next" button. You will be redirected to the following page.

Step 1: New Template: New Template Step 1 of 3

Previous Next Cancel

**Email Template Information**

Folder: Unified Public Email Templates (Email Templates)

Available for Use: ☒

Email Template Name:

Template Subject Name:

Description:

Subject:

Email Body:

Previous Next Cancel

- Select **Folder** as "My Personal Email Templates" if you want the Email template available only for your account. If you want to make it available for all users in your company then select "Unified Public Email Templates".
- Select the "Available for Use" Check box to make it available for use.
- Enter the Template Name.
- Select your time zone.
- Enter the description, subject and Email Body for your Email Template as shown below.

**Email Template Editor** [Save] [Save & New] [Cancel]

**Email Template Information**

Folder: [Untitled Folder, Chatter, Email Templates] [X]

Available For Use: [X]

Email Template Name: [Alert Opportunity Closing On]

Template Unique Name: [Alert\_Opportunity\_Closing\_On]

Encoding: [UTF-8 (U+0000 to U+FFFF) (Legacy) (UTF-8 (U+0000 to U+FFFF)) [X]]

Description: [ ]

Subject: [Alerting Customer]

Email Body:
 

Dear {!Opportunity.OwnerFullName},

Kindly follow up with the customer related to Opportunity "{!Opportunity.Name}" before the opportunity closing date "{!Opportunity.CloseDate}".

Opportunity Link: <{!Opportunity.Link}>

[Save] [Save & New] [Cancel]

- Email body contains the content that you want to send as an alert. Salesforce also provides you merged fields to use in the Email body. In the above figure {!Opportunity.OwnerFullName}, {!Opportunity.Name}, {!Opportunity.CloseDate} and {!Opportunity.Link}" are the merged fields used in the body to get opportunity owner's name, opportunity Name, Opportunity closing date and Opportunity record link. You can get this merged fields in "Available Merge Fields" section as shown in below figure.
- Select the "Field type". I've selected "Opportunity Fields".
- Select the field you want to use from the dropdown list. I've selected "Opportunity Name".
- Copy the merge field value and use in the "Email Body".

Available Merge Fields  
Select Field Type  
Opportunity Fields  
Select Field  
Opportunity Name  
Copy Merge Field Value  
{Opportunity Name}  
Copy and paste the merge field value into your template below

Step 2: Test Email Template: New Template

Email Template Information

Folder: Untitled Public Classic Email Templates  
Available For Use: ☐  
Email Template Name:

- Click on "Save" button. The template is ready to use. Now we'll create Email Alert for this template.

## Step 2: Creating an Email Alert

Below are the steps to create Email Alert

- Navigate to Setup->Build->Create->Workflow & Approvals-> Email Alerts
- Click on "New Email Alert" button. You will be redirected to the following page.

**New Email Alert**

Back Save & Next Cancel

**Email Alert Info**

Description

Object Name

Object

Email Template

Recipient Type

**Available Recipients**

- User: Owner of Opportunity
- User: Integration User
- User: Rollup User
- User: Security User

**Selected Recipients**

**Email Body**

New Email Address

☐ Send the email to the email address specified in the email body

Back Save & Next Cancel

- Enter all the required fields.
- Select Object from the drop-down list. As we are creating an alert for opportunity object I've selected "Opportunity" from the drop-down list.
- Select the Email template from lookup field. I've selected Email Template created in
- Select the recipient to whom you want to send an Email Alert. Our requirement is to send an Email alert to Opportunity owner. Select "Owner" from "Recipient Type" and add the recipient from "Available Recipients" to "Selected Recipients" as shown below.





The screenshot shows a software window with a title bar at the top. Below the title bar is a dark blue header bar containing the text "Page 1 of 1" on the left and "Page 1 of 1" on the right. The main content area is light gray and contains a "Next" button in the top right corner. Below the button is a text input field with a red vertical bar on the left side. At the bottom of the window, there are two more buttons, "Next" and "Cancel", in the bottom right corner.

- Click on "Next" button.
- Enter all the required fields as shown below.

Click on create, edit, delete, and clone to trigger your workflow rule. In the next step, associate workflow actions with the workflow rule.

[New](#) [Cancel](#)

### Rule Rule

**Name:**

**Description:**

### Evaluation Criteria

**Evaluate Description every:**

- ☐ On created
- ☐ On created and every time it's edited
- ☒ On created and every time it's edited to subsequently meet criteria [Help](#)

[Cancel](#) [Next Step](#)

### Rule Criteria

**Specify rule filter:**

Field	Operator	Value	
<input type="text" value="Opportunity Stage"/>	<input type="text" value="not equal to"/>	<input type="text" value="Closed Won"/>	<input checked="" type="checkbox"/> AND
<input type="text" value="Name"/>	<input type="text" value="Name"/>		<input type="checkbox"/> AND
<input type="text" value="Name"/>	<input type="text" value="Name"/>		<input type="checkbox"/> AND
<input type="text" value="Name"/>	<input type="text" value="Name"/>		<input type="checkbox"/> AND
<input type="text" value="Name"/>	<input type="text" value="Name"/>		

[Add New Criteria](#)

- Select “created, and every time it’s edited to subsequently meet criteria” as Evaluation Criteria
- I’ve selected “Opportunity stage not equals to Closed Won, Closed Lost” as Rule Criteria.
- Click on “Save & next”. You will be redirected to the following page.

## Edit Rule Time based Email Trigger

### Step 1: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	Approximately 1 image was used, no Closed files, Closed lead
Workflow Actions	Execute the rule when a record is created and any time its edited or subsequently meet criteria

### Immediate Workflow Actions

Workflow actions have been added.

[Add Workflow Action](#)

### Time Dependent Workflow Actions [See an example](#)

 No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

[Add Time Trigger](#)

- Click on **Add Time Trigger**. You will be redirected to the following page

Add New Trigger  
**Opportunity**

---

**Workflow Time Trigger Edit**

Workflow Rule: Time-based Workflow Trigger

15 Days Before Workflow: Opportunity Close Date

**Save** Cancel

I've selected 15 days before opportunity close date to meet the above requirement. Click on **save** button. The following screen will be shown

## Edit Rule Time based Email Trigger

Step 1: Specify which flow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Main criteria: Opportunity is a stage between my closed won prospect and  
 Transition criteria: Opportunity is when a record is created and any time it is added to subsequently main criteria

### Immediate Workflow Actions

My workflow actions have been added.

Add Workflow Action

### Time Dependent Workflow Actions

[View all actions](#)

"Where Before Opportunity" Close Date    [Edit](#)   [Delete](#)

No workflow actions have been added to the time trigger

Add Workflow Action

- New Task
- New Email Alert
- New Field Update
- New Multi-Step Process
- Select Existing Action**

- "Select Existing Action" from "Add Workflow Action" dropdown list. The following screen will be shown.

### Select Existing Actions

Choose Action Type

Search:

Available Actions

Email Alert: Configure alert the following data

Email Alert: Email when opportunity is Closed Picked

Selected Actions

Add

Up

Down

Remove

- Choose "Action Type" as "Email Alert" and select the Email Alert created in **step2** and click on "save". You will be redirected to the following page.



**Time Based Email Trigger**

[Back to list](#) [New Trigger](#)

**Workflow Rule Status** [Add](#) [Edit](#) [Delete](#) [Activate](#)

Rule Name	Workflow Rule Type	Status	Created By	Updated By
Time Based	Time Based Workflow	Active	Admin	Admin

**Description:** To activate trigger's eligibility criteria to start following date

**Criteria:** Opportunity: Stage is set to Closed Won

**Created By:** Admin [View Profile](#) [View History](#)

**Updated By:** Admin [View Profile](#) [View History](#)

**Workflow Rule** [Add](#)

**Workflow Rule Name**

**Workflow Rule Description**

**Workflow Rule Status** [Add](#)

**Workflow Rule Type**

**Workflow Rule Criteria**

**Workflow Rule Action**

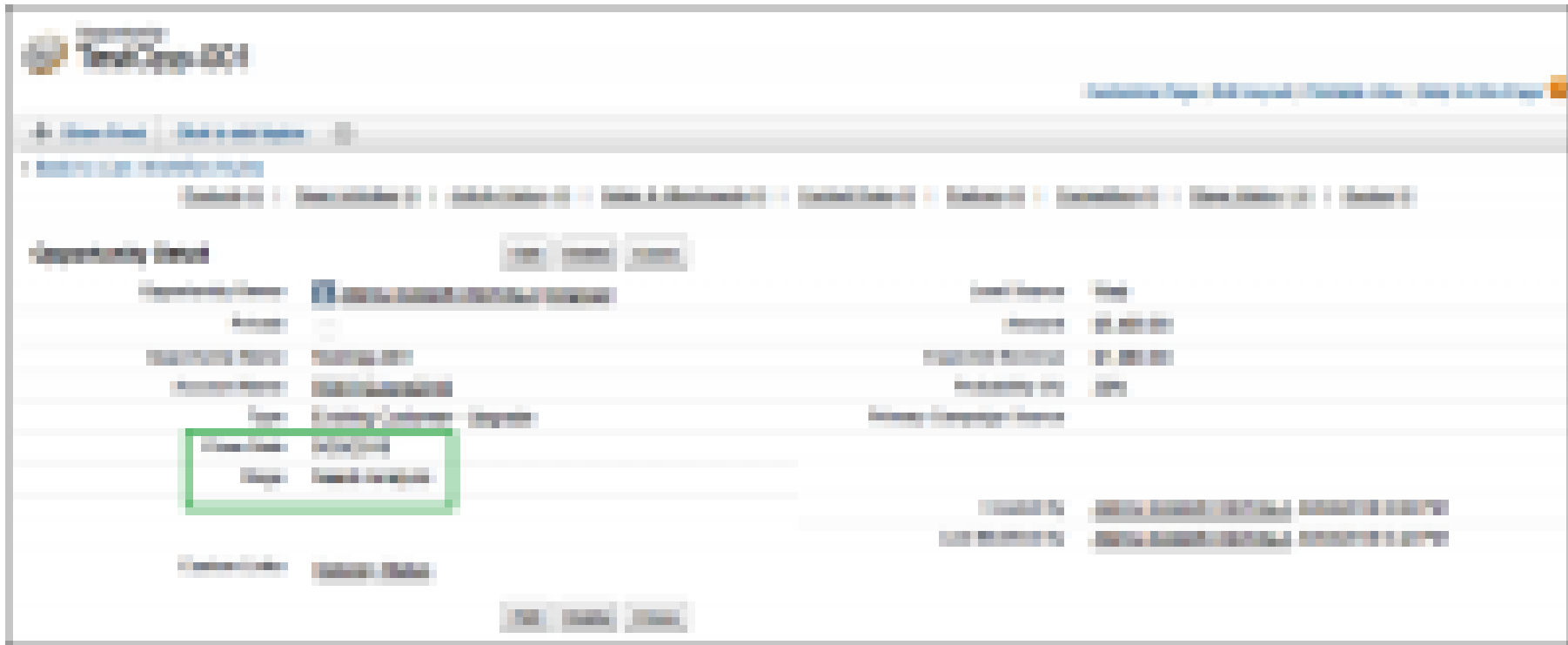
**Workflow Rule History**

Time	Description
10:00 AM	Workflow Rule is created

- Click on "Activate" button to activate the workflow.

We have successfully configured Time Based Workflow. Now we will test the workflow by creating an opportunity which meets the criteria.





- When a workflow rule is triggered, all the Time-Dependent actions will be placed in the workflow queue.
- You can check the queued time-based actions by navigating to **Setup-> Monitor-> Time-Based Workflow**. You can use the criteria to monitor the queue as shown in the below screenshot.

**Time-Based Workflow**

For selected records, trigger a workflow rule. The workflow rule is applied to the records that are created or updated after the workflow rule is activated.

Object	Field	Criteria	Value
Opportunity	Closing Date	Is After	15 days before the closing date
Opportunity	Closing Date	Is Before	
Opportunity	Closing Date	Is Equal To	
Opportunity	Closing Date	Is Not Equal To	
Opportunity	Closing Date	Is Not After	
Opportunity	Closing Date	Is Not Before	

Save

Cancel

Object	Field	Criteria	Value	Workflow Rule Name	Workflow Rule	Workflow Rule	Workflow Rule
Opportunity	Closing Date	Is After	15 days before the closing date	15 days before the closing date	15 days before the closing date	15 days before the closing date	15 days before the closing date

Save

- As we have created a workflow for opportunity object, I've selected object as criteria. In the search result, a time-based action is queued to trigger email alert 15 days before the opportunity closing date.

**Note:**

- Time-Based workflow rules are not applied to previously created records. The rule is applied only for the records created/updated after the workflow is activated.
- If a record that has pending actions is deleted, then all the pending actions for that record will be removed from the queue.

In this way, you can configure Time-based workflows. You can also add multiple time-dependent actions for a workflow rule to meet your business requirements.