

## Workflows and Approvals

### 1. What is work flow ?

Ans: Work flow works based on certain criteria,By using workflow we can automate the business process like Email alerts,tasks,filed updates

### 2. What are the different kinds of evaluation criteria's (events)?

Ans: 1.created

2.created, and every time it's edited

3.created, and any time it's edited to subsequently meet criteria

### 3. In which object workflows are stored?

Ans: Workflow

### 4. 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.

### 5.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)

### 6. What is immediate workflow action?

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

### 7. What is time dependent workflow action?

Ans: The action which will be performed in future based on the any of the date field. To create time dependent workflow action we should create one time trigger. in time trigger we can give either days or hours with the maximum of 999 value and we can select either before or after.

### 8. For which event we can't create time dependent workflow action?

Ans: Created and everytime edited to meet the criteria.

### 9. What are the different kinds of workflow actions?

Ans: New field update (we can update a field of the same object or the fields of the parent objects which are at master side in master-detail relationship, only for master-detail parent objects we can update the field and for lookup we can't update)

New email alert (we can send emails if the criteria meets)  
New task (we can create new task)  
New outbound Message (we can make a callout)

#### **10. What are the types of email templates?**

Ans: 1. Text  
2. HTML (with letter head)  
3. Custom HTML (without letter head)  
4. Visual Force

#### **12. How can you monitor future actions of time based workflow?**

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

**13. There is a timebased workflow which will update one of the fields if the criteria meet. User submits the record with valid criteria, workflow triggered so that the field update is queued in the 'time based flow' queue which will fire after one day. If the user modifies the record which is submitted before the scheduled date, after modification, a record criterion is not meeting. Whether the field will be updated or not in schedule date?**

Ans: It won't trigger in the schedule date because if we modify the record to not meeting criteria that queued field update will be removed from the 'time based flow' queue.

**14. 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 schedule date?**

Ans: Yes, It will trigger in scheduled date.

**15. 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?**

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

#### **16. What is recursive workflow rule? How to avoid recursive workflow rules?**

Ans: 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.

#### **17. What is Approval Process?**

Ans: If the criteria of the record meets then by clicking on submit for Approval button user can submit the record for approval (Note: Approval history related list should be displayed on the record detail page)

**18. Scenario: After activating the approval process, I want to add one more step. Is it possible?**

Ans: It's not possible, to add one more step deactivate the approval process and clone the deactivated approval process and add the new steps.

**19. In which object all Approval process are stored?**

Ans: Approval

**20. What is Time-Dependent Workflow?**

Time-Dependent Workflow gives you the ability to

- 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

**21. Working with Time-Dependent workflow**

**Time Triggers**

- are time values relevant to the record and are used to initiate a time-dependent action

**Time-Dependent Actions**

- are any of the five workflow actions with an associated time-trigger
- are queued whenever a rule is triggered (see next page)
- can be reused in additional workflow rules as long as the object is the same
- are removed from the workflow queue if the corresponding record no longer meets rule trigger criteria.
- are dynamically updated in the workflow queue if the corresponding record field is updated.

**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

## **22. 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.

### **Time-Dependent Workflow Limitations:**

Time triggers don't support minutes or seconds.

Time triggers can't reference the following:

- DATE or DATETIME fields containing automatically derived functions, such as TODAY or NOW.
- Formula fields that include related-object merge fields.

You can't add or remove time triggers if:

- The workflow rule is active.
- The workflow rule is deactivated but has pending actions in the queue.
- The workflow rule evaluation criteria is set to Evaluate the rule when a record is: created, and every time it's edited.
- The workflow rule is included in a package.

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2. If you don't enable **Re-evaluate Workflow Rules after Field Change**checkbox in the **Field**