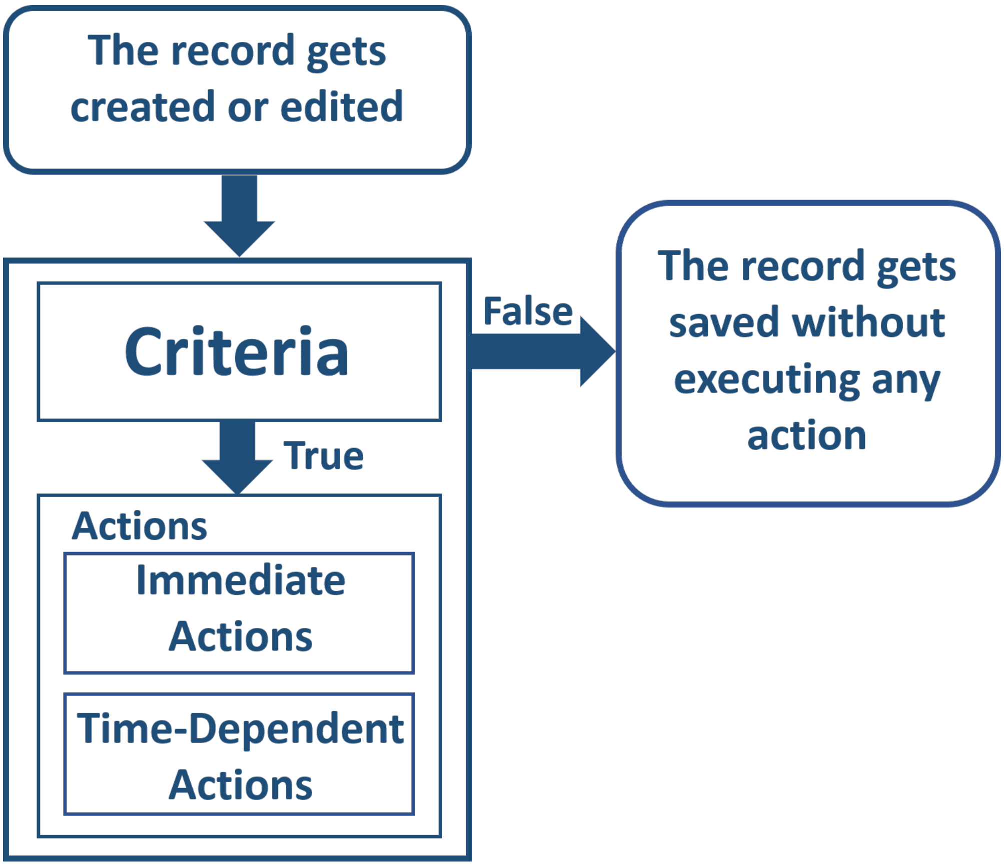
SESSION 8

Workflow Rules

Workflow Rules are used to implement the Automated Processes inside the organization.

By using Workflow Rules, we can make certain actions to be get performed automatically. i.e. Instead of performing the operations manually as part of the organization policies, we can make certain operations to be get executed automatically by default.



Basic Structure of Workflow Rule

Each Workflow Rule Contains 2 things as below..

1. Event / Evaluation Criteria:
It describes, when the Workflow Rule should get fired.

Salesforce provides the below 3 Criteria for the Workflow Rule.

i. Created:
This event will fire the Workflow Rule, Once a New Record has been Created inside the object.

ii. Created and EveryTime it is Edited:
This event will fire the Workflow Rule, After Inserting a New Record and After Updating an existing record in the object.

iii. Created, and Anytime it is Edited and meeting
Subsequent Criteria:
This event will fire the Workflow Rule, Once a New Record has been Created inside the object. And Once an existing record has been updated in the object, which meets the specified criteria.

2. Actions:
Once the Workflow Rule has been fired, then we can invoke one or more actions to perform the operations as part of the business requirement.

We can perform the below actions through Workflow rules.

1. Email Alerts:
By using this action, we can send an Email Notification to one or more users by using a pre-existing email template.

Pre-Requisite:
To send the Email Alerts to the users, we need an Email Template.

2. Field Updates:
By using this action, we can update a field value by assigning the New value for the field.

3.Assigning a Task:
By using this action, we can assign a Task record to the user with the specified Subject, Description, Status, Priority, and DueDate. So that it will remind the people with a pop-up alert.

4. Outbound Message:
This action is used to send a message to the external system to have the integration with the Third Party systems.

Note:
Each Workflow Rule should be associated with an object. But, an Object can have one or more Workflow Rules.

Navigation:
Setup --> Build --> Created --> Workflow & Approvals --> Workflow Rules.

Salesforce provides 2 Types of Workflow Rules:

1. Immediate Action Workflow Rules:
These Workflow Rules will fire the actions immediately, as soon as the Criteria has been met.

2. Time-Dependant Action Workflow Rules / Time Triggers:
These Workflow Rules will fire the actions either After / Before the specified Time Period after meeting the criteria.

Time-Dependant Actions are used to fire the Actions either before / after the specified time period.

All the Time-Dependant actions will get awaited inside the "Workflow Queue" till the schedule time is up. Once the schedule time is up, then it will fire the actions and will remove the entry from the Queue.

Note:
We can't add the Time-Dependant actions for the Workflow criteria "Created and EveryTime it is Edited".

Note:
In a Workflow Rule, we can add both "Immediate Actions and Time-Dependant Actions".

1) UseCase:
Configure a Workflow Rule on the Contact object, to send an Email Notification to the Contact person upon creating a New Contact Record.

Object Name: Contact Object.

Evaluation Criteria: Created.

Rule Conditions:

Contact:Email != Null

Action Type: Immediate Actions.

Action Name: Email Alert.

Pre-Requisite: We should have an Email Template.

Assignments:

1. Configure a Workflow Rule on the Lead Object, to send the Email Notification to the Lead Person upon Creating a New Lead Record inside the object.

2. Configure a Workflow Rule on the Case Object, to Send the Email Notification to the Case Owner, upon Creating and Updating the Case record in the object.
Evaluation Criteria: Created, and EveryTime it is Edited.

3. Configure a Workflow rule on Employee object when salary is greater than 50000 send an email alert to manager.