BUILDING APPLICATIONS WITH FORCE.COM – PART 2 (AUTOMATING BUSINESS PROCESSES WITH WORKFLOW AND LIGHTNING PROCESS BUILDER)

Exercise Guide

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12-1: Create Workflow Rules

Scenario:

At Universal Containers, recruiters are responsible for approving or rejecting proposed positions created by hiring managers.

When a new candidate has been created, the candidate should be assigned to the Recruiter Queue and a New Candidate Notification should automatically be sent out to all queue members.

Goal:

Create custom workflow rules and associated field updates for routing new Positions and Candidates to the recruiters.

Tasks:

1. Create a workflow rule with a field update to route new Positions to the Recruiter Queue.
2. Create a workflow rule with a field update to assign new candidates to the Recruiter Queue.

Time:

15 minutes

Instructions:

1. Create a workflow rule with a field update to route new Positions to the Recruiter Queue.
   A. Click **Setup | Create | Workflow & Approvals | Workflow Rules**.
   B. If the splash page appears, click **Continue**.
   C. Click **New Rule**.
   D. Select `Position` from the **Select object** picklist, and click **Next**.
   E. Configure rule.
      i. **Rule Name**: `New Position Rule`
      ii. **Evaluate the rule when a record is**: `Created`
      iii. **Run this rule if the following**: `criteria are met: Position: Status | equals | New`
   F. Click **Save & Next**.
   G. In the Immediate Workflow Actions section, click **Add Workflow Action: New Field Update**.
      i. **Name**: `Assign New Position to Recruiter Queue`
      ii. **Unique Name**: `Assign_New_Position_to_Recruiter_Queue` (This field

auto-populates.)
   iii. **Field to Update**: `Owner`
   iv. **Owner**: `Queue | Recruiter Queue`
   v. **Notify Assignee**: (selected)

H. Click **Save**.
I. Click **Done**.
J. Click **Activate**.
K. Click the Positions tab and add a new position, setting the **Status** to `New`. Once you have saved it, check the **Owner** field on the new record.

2. Create a workflow rule with a field update to assign new candidates to the Recruiter Queue.

   A. Click **Setup | Create | Workflow & Approvals | Workflow Rules**.
   B. If you see the splash page, click **Continue**.
   C. Click **New Rule**.
   D. Select `Candidate` from the **Select object** picklist, and click **Next**.
   E. Configure rule.

      i. **Rule Name**: `New Candidate Notification`
      ii. **Evaluate the rule when a record is**: `Created`
      iii. **Field: Operator: Value**: `Candidate: Created Date | equals | TODAY`

   F. Click **Save & Next**.
   G. In the Immediate Workflow Actions section, click **Add Workflow Action: New Field Update**.

      i. **Name**: `Assign New Candidate to Recruiter Queue`
      ii. **Unique Name**: `Assign_New_Candidate_to_Recruiter_Queue` (This field auto-populates.)
      iii. **Field to Update**: `Owner`
      iv. **Owner**: `Queue: Recruiter Queue`
      v. **Notify Assignee**: (selected)

   H. Click **Save**.
   I. Click **Done**.
   J. Click **Activate**.
   K. Click the Candidates tab and create a new candidate. Make sure to enter information for email, name, and phone. Once you have saved it, check the **Owner** field on the new record.

12-2: Set Up Time-Dependent Workflow

Scenario:

When an offer is made to a candidate, it is valid for only two days. Universal Containers would like to set up a time-dependent workflow rule that evaluates offers in a sent status, and sends a task to the offer owner to remind them to follow up with the candidate.

Goal:

Create a workflow rule that will escalate offers that have been open for two days.

Tasks:

1. Create a workflow rule with time-dependent actions.
2. Create a new offer to test the process and monitor the time-based workflow queue.

Time:

15 minutes

Instructions:

1. Create a workflow rule with time-dependent actions.
   A. Click **Setup | Create | Workflow & Approvals | Workflow Rules**.
   B. When you see a splash page, click Continue.
   C. Click **New Rule**.
   D. Select `Offer` from the **Select object** picklist, and click **Next**.
   E. Configure rule:
      i. **Rule Name**: Submitted Offer Requires Attention
      ii. **Description**: If an offer has been sent, but no word from candidate in 2 days, have recruiter follow up.
      iii. **Evaluate the rule when a record is**: created, and anytime it's edited to subsequently meet criteria.
      iv. **Run this rule if the following**: `criteria are met: Offer: Status | equals | Sent`
   F. Click **Save & Next**.
   G. Click **Add Time Trigger**.
   H. Select `2 | Days | After | Rule Trigger Date` from the **Workflow Rule** picklists.
   I. Click **Save**.
   J. Under this Time Trigger, click **Add Workflow Action | New Task**.
      i. **Assigned To**: `Offer Owner` (Click the lookup icon, select `Owner` from the **Type** picklist, and click **Offer Owner** to select.)
      ii. **Subject**: `Follow up on submitted offer`

iii. **Unique Name**: `Follow_up_on_submitted_offer` (This field auto-populates.)
iv. **Due Date**: `Rule Trigger Date | plus | 0 days`
v. **Status**: `Not Started`
vi. **Priority**: `High`
vii. **Comments**: `Recruiting has not received a response to an offer submitted to a candidate. Please follow up with candidate.`

K. Click **Save**.
L. Click **Done**.
M. Click **Activate**.

2. Create a new offer to test the process and monitor the time-based workflow queue.

A. Click the Job Applications tab.
B. Click **APP-0000**.
C. Scroll down to the Offers related list and click **New Offer**.

i. **Offer Date**: *(today's date)*
ii. **Offer Expiration Date**: *(today's date + 2)*
iii. **Status**: `Sent`
iv. **Actual Salary**: `45,000`
v. **Stock Options**: `500`
vi. **Bonus Percentage**: `10`

D. Click **Save**.
E. Monitor the time-based workflow queue.

i. Click **Setup | Monitor | Time-Based Workflow**.
ii. Click **Search**.

Note the offer listed among the pending actions in the queue.

12-3: Create a Process

Scenario:

At Universal Containers (UC), company policy states that hiring managers must always take part in the interview process. UC wants a new interviewer record to be created automatically for the hiring manager whenever a new position is created.

Goal:

Build a process to create a new interviewer record for the hiring manager of a position.

Tasks:

1. Create a process with an immediate action.
2. Test the process.

Time:

10 minutes

Instructions:

1. Create a process with an immediate action.
    A. Click **Setup | Create | Workflow & Approvals | Process Builder**.
    B. Click **New**.
    C. Define the process properties.
        i. **Name**: `Create Interviewer Record`
        ii. **Description**: `Create an interviewer record for a new position`
    D. Click **Save**.
    E. Click **Add object**.
        i. **Object**: `Position`
        ii. **Start the process**: `only when a record is created`
    F. Click **Save**.
    G. Click **Add criteria**.
        i. **Criteria Name**: `Always Execute`
        ii. **Criteria for Executing Actions**: `No criteria—just execute the actions!`
    H. Click **Save**.
    I. Under IMMEDIATE ACTIONS, click **Add Action**.
        i. **Action Type**: `Create a Record`
        ii. **Action Name**: `Create Interviewer Record`
        iii. **Record Type**: `Interviewer`
    J. Relate the interviewer record to the position record.

i. **Field**: `Position`
ii. **Type: Reference**
iii. Click the search icon in the **Value** field, select `Record ID`, and click **Choose**.

K. Set the Employee field to the Hiring Manager.

i. Click **Add Row**.
ii. **Field**: `Employee`
iii. **Type: Reference**.
iv. Click the search icon in the **Value** field, select `Hiring_Manager__c`, and click **Choose**.

L. Click **Save**.
M. Click **Activate**.
N. Click **OK**.

2. Test the process.

A. Click **Back To Setup**.
B. From the Positions tab, click **New**.

i. **Title**: `Full-Stack Web Developer`
ii. **Type**: `Full Time`
iii. **Department**: `Engineering`
iv. **Location**: `San Francisco`
v. **Pay Grade**: `ENG-200`
vi. **Hiring Manager**: `Andy Macrola`
vii. **Priority**: `High`
viii. **Status**: `New`
ix. **Job Description**: `Work with a team to design, code, implement and maintain a fully functional, modern interactive website.`

C. Click **Save**.
D. From the Interviewers related list, click the interviewer record.
E. Verify that the **Employee** and **Position** fields have the correct values.

