Salesforce

Queues and Public Groups
Workflow Rules
Email Template
Assignment Rule
Escalation Rule
Duplicate Rule

By- Saumya Bhasin

Deloitte.

Queues?

Salesforce Queues are a collection of records that doesn't have any owner. Users who have access to the queue can examine every record that is in it and claim ownership of the one's they want. Queues in Salesforce help to prioritize, distribute, and assign records to teams who share workloads.

The OWD sharing model for an object determines the access users have to that object's records in queues.

Public Read/Write/Transfer

Users can view & take ownership of records from any queue.

Public Read/Write or Public Read-Only

Users can view any queue but only take ownership of records from the queue of which they are a member or depending on the sharing setting if they are higher in a role hierarchy than a queue member.

Private

Users can only view and accept records from Queues of which they are a member or depending on sharing settings if they are higher in the role hierarchy than a queue member.

Regardless of the sharing model users must have the edit permissions to take ownership of records in queues of which they are the member.

Groups?

A group consists of a set of users. A group can contain individual users, other groups, or the users in a particular role or territory. It can also contain the users in a particular role or territory plus all the users below that role or territory in the hierarchy.

Groups are used:

To set up default sharing access via a sharing rule

To share your records with other users

Public Groups - Administrators and delegated administrators can create public groups. Everyone in the organization can use public groups.

Permission set groups - consist of permission sets rather than users. Permission set groups bundle permission sets based on job functions or tasks.



Workflow Rules?

Workflow in Salesforce is a force.com platform business logic engine that allows you to define rules to automate certain actions when a particular criteria is met.

Workflow rules are considered as a container that consists of two components:

a. Criteria:

It consists of the condition which if found true then the actions should take place.

b. Actions:

There are 4 actions which can be specified in a workflow rule:

- 1. Email Alert:
- 2. Field Update
- 3. Tasks
- **4.Outbound Messages**

Evaluate the rule when a record is	Description
1. Created	Runs the rule if the rule criteria is met, only when a record is created. Using this option the rule runs single time only.
2. Created & Every time its edited	Runs the rule if the criteria is met every time a record is created and edited. With this option the rule criteria runs repeatedly as long as the rule criteria is met. Note: Time Dependent actions cannot be added in a workflow rule with this evaluation criteria.
Created and Every time its edited to subsequently meet the criteria	 Runs the rule if the criteria is met: Always when a record is created and meets the criteria. Only when a record not meeting the criteria is updated and now it meets the criteria. By default this criteria is selected.



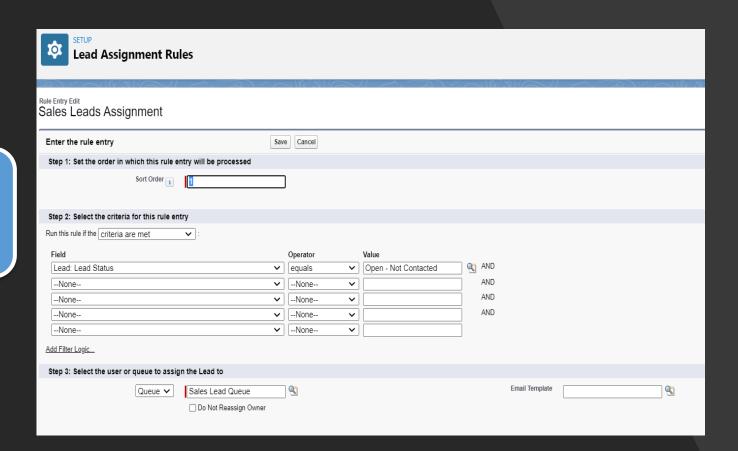
Email Templates?

Pre-formatted email that you can use to create and send emails quickly Text
HTML with Classic Letterhead
Custom
Visualforce

Deloitte.

Assignment Rule?

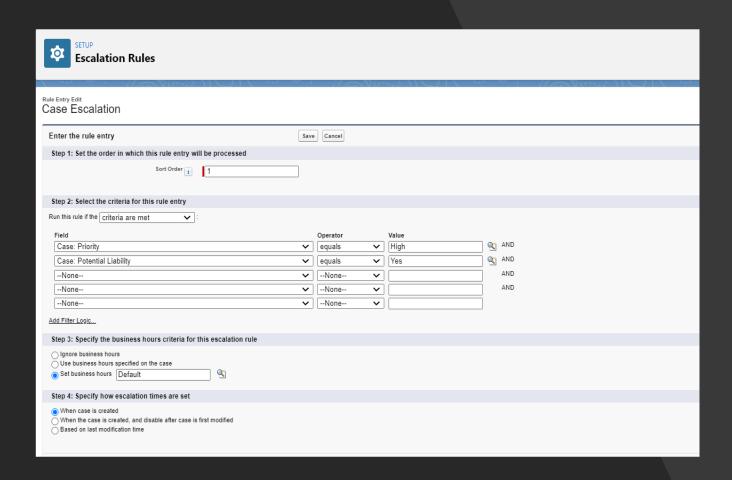
Automatically assign Lead or Case to owner(User or Queue)





Escalation Rules?

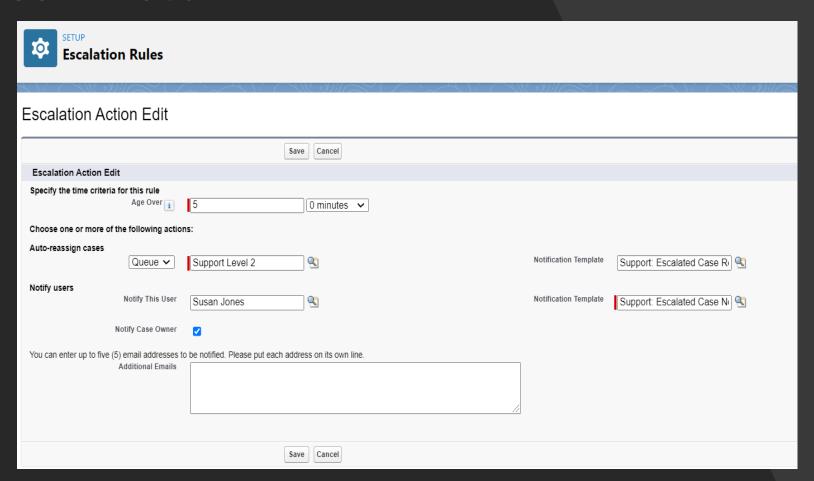
Automatically escalate cases when the case meets the criteria defined in the rule entry.





Escalation Rules? ...ctd

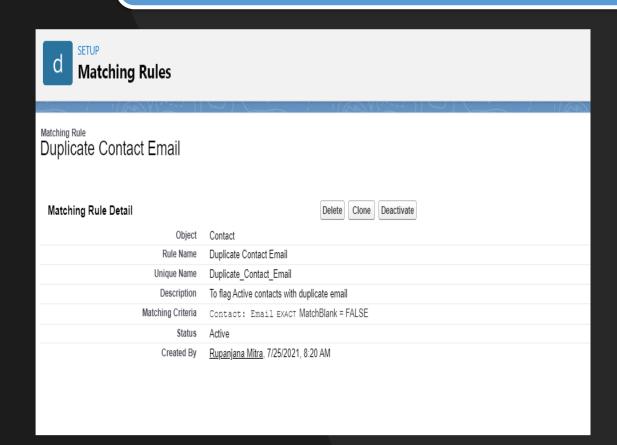
Escalation Action

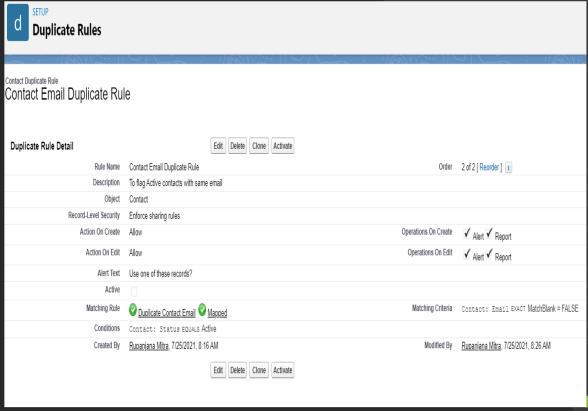




Duplicate Rules?

Defines what happens when a user views a record with duplicates or starts creating a duplicate record.





Groups and Queues:

https://developer.salesforce.com/docs/atlas.enus.securityImplGuide.meta/securityImplGuide/user groups.htm

https://help.salesforce.com/s/articleView?id=sf.setting_up_queues.htm&type=5

https://shreysharma.com/queues/

Training Links

Workflow Rules and Email Alert:

https://help.salesforce.com/s/articleView?id=sf.customize_wf.htm&type=5

https://trailhead.salesforce.com/content/learn/projects/customize-an-org-to-support-anew-business-unit/configure-an-email-letterhead-and-template

Escalation, Assignment and Duplicate Rules:

https://help.salesforce.com/s/articleView?id=workflow_rules_define.htm&type=5&language=en_US

https://developer.salesforce.com/docs/atlas.en-

us.usefulWorkflowRules.meta/usefulWorkflowRules/workflow_examples.htm

https://trailhead.salesforce.com/en/content/learn/modules/sales_admin_duplicate_management_unit_2



Thank You!

