



Salesforce



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



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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.
3. Created and Every time its edited to subsequently meet the criteria	Runs the rule if the criteria is met: <ul style="list-style-type: none">• 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

Assignment Rule?

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

 **SETUP**
Lead Assignment Rules

Rule Entry Edit
Sales Leads Assignment


Enter the rule entry Save Cancel

Step 1: Set the order in which this rule entry will be processed

Sort Order


Step 2: Select the criteria for this rule entry

Run this rule if the criteria are met :


Field	Operator	Value	
<input type="text" value="Lead: Lead Status"/>	<input type="text" value="equals"/>	<input type="text" value="Open - Not Contacted"/>	 AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text" value=""/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text" value=""/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text" value=""/>	AND
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>	<input type="text" value=""/>	

[Add Filter Logic...](#)

Step 3: Select the user or queue to assign the Lead to


Queue 

☐ Do Not Reassign Owner

Email Template 

Escalation Rules?

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

 **SETUP**
Escalation Rules

Rule Entry Edit
Case Escalation



Enter the rule entry Save Cancel

Step 1: Set the order in which this rule entry will be processed

Sort Order 1

Step 2: Select the criteria for this rule entry

Run this rule if the criteria are met :


Field	Operator	Value	
Case: Priority	equals	High	 AND
Case: Potential Liability	equals	Yes	 AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

[Add Filter Logic...](#)

Step 3: Specify the business hours criteria for this escalation rule

☐ Ignore business hours

☐ Use business hours specified on the case

☒ Set business hours Default 

Step 4: Specify how escalation times are set


☒ When case is created

☐ When the case is created, and disable after case is first modified

☐ Based on last modification time

Escalation Rules? ...ctd

Escalation Action

 **SETUP**
Escalation Rules


Escalation Action Edit

Save

Cancel


Escalation Action Edit


Specify the time criteria for this rule

Age Over  5 0 minutes ▾


Choose one or more of the following actions:


Auto-reassign cases

Queue ▾ Support Level 2 

Notification Template Support: Escalated Case R 

Notify users

Notify This User Susan Jones 

Notification Template Support: Escalated Case N 

Notify Case Owner ☒

You can enter up to five (5) email addresses to be notified. Please put each address on its own line.

Additional Emails

Save

Cancel

Duplicate Rules?

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

SETUP

d

Matching Rules

Matching Rule

Duplicate Contact Email

Matching Rule Detail

Delete

Clone

Deactivate

Object	Contact
Rule Name	Duplicate Contact Email
Unique Name	Duplicate_Contact_Email
Description	To flag Active contacts with duplicate email
Matching Criteria	Contact: Email EXACT MatchBlank = FALSE
Status	Active
Created By	Rupanjana Mitra, 7/25/2021, 8:20 AM

SETUP

d

Duplicate Rules

Contact Duplicate Rule

Contact Email Duplicate Rule

Duplicate Rule Detail

Edit

Delete

Clone

Activate

Rule Name	Contact Email Duplicate Rule	Order	2 of 2 [Reorder]
Description	To flag Active contacts with same email		
Object	Contact		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow	Operations On Create	✓ Alert ✓ Report
Action On Edit	Allow	Operations On Edit	✓ Alert ✓ Report
Alert Text	Use one of these records?		
Active	<input type="checkbox"/>		
Matching Rule	✓ Duplicate Contact Email ✓ Mapped	Matching Criteria	Contact: Email EXACT MatchBlank = FALSE
Conditions	Contact: Status EQUALS Active		
Created By	Rupanjana Mitra, 7/25/2021, 8:16 AM	Modified By	Rupanjana Mitra, 7/25/2021, 8:26 AM

Edit

Delete

Clone

Activate

Training Links

Groups and Queues:

https://developer.salesforce.com/docs/atlas.en-us.securityImplGuide.meta/securityImplGuide/user_groups.htm

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

<https://shreysharma.com/queues/>

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-a-new-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/sales_admin_duplicate_management_unit_2

Thank You !

