Exam.10 Workflow Considerations

2018年7月12日 10:54

- Each workflow rule applies to a single object.
- If you have workflow rules on converted leads and want to use cross-object field updates on the resulting accounts and opportunities, you must enable the lead setting Require Validation for Converted Leads.
- Workflow rules on custom objects are automatically deleted if the custom object is deleted.
- The order in which individual actions and types of actions are executed is not guaranteed. However, field update actions are executed first, followed by other actions.
- To create workflow rules that update case fields based on new case comments or incoming email messages, choose Case Comment or Email Message from the Select Object drop-down list; Email Message is only available if Email-to-Case or On-Demand Email-to-Case is enabled. You can only create email message workflow rules for field updates, and case comment workflow rules for field updates, email alerts, and outbound messages. For example, you can create a workflow rule so that an email marked as Is Incomingchanges its case's Status from Closed to New.
- Changes you make to records while using Connect Offline are evaluated by workflow rules when you synchronize.
- Salesforce processes rules in the following order:
  1. Validation rules
  2. Assignment rules
  3. Auto-response rules
  4. Workflow rules (with immediate actions)
  5. Escalation rules
- If a lookup field references a record that has been deleted, Salesforce clears the value of the lookup field by default. Alternatively, you can choose to prevent records from being deleted if they're in a lookup relationship.
- If you create workflow rules to replace any Apex triggers, make sure you delete those Apex triggers when you activate the equivalent workflow rules. Otherwise, both Apex triggers and workflow rules will fire and cause unexpected results, such as overwritten field updates or redundant email messages.

From <https://help.salesforce.com/articleView?id=workflow_rules_considerations.htm&type=5>