Creating a Workflow Rule in Salesforce to Trigger Actions When a Case is Closed

Introduction: This guide explains how to create a workflow rule in Salesforce to automate actions when a case is closed. For instance, you can send follow-up emails to customers, update case statuses, or notify team members, ensuring timely communication and action when a case is resolved.

Step 1: Access Workflow Rules in Salesforce

1. Log in to your **Salesforce** account.
2. Click the **Setup** icon in the upper-right corner.
3. In the **Quick Find** search bar, type **Workflow Rules**, and select it under **Process Automation**.

Step 2: Create a New Workflow Rule

1. Click **New Rule**.
2. Under the **Select Object** section, choose **Case** as the object, then click **Next**.

Step 3: Define Rule Criteria

1. Enter a **Rule Name**, such as Trigger Actions on Case Closure.
2. Set the **Evaluation Criteria** to "created, and any time it's edited to subsequently meet criteria."
3. Define the **Rule Criteria**:

   - Field: **Case: Status**
   - Operator: **Equals**
   - Value: **Closed**

Step 4: Add Workflow Actions

Once the rule is defined, you can add actions triggered by the case closure.

1. **Immediate Actions**:

   - Select **Email Alert** to send a follow-up email to the customer.
   - Choose a predefined email template and the recipient (such as the case contact).

2. **Optional Actions**:

   - Create a **Task** to assign follow-up work to a team member.
   - Use **Field Update** to automatically update case-related fields, such as setting the case resolution time.

Step 5: Save and Activate the Workflow Rule

1. After adding actions, click **Save**.
2. Click **Activate** to enable the workflow rule, ensuring that actions will automatically trigger when a case is closed.

Conclusion: Creating a workflow rule for closed cases helps automate key tasks such as sending follow-up emails, updating records, and assigning tasks. This workflow ensures efficient and consistent communication with customers and internal teams, improving overall case management and resolution tracking.