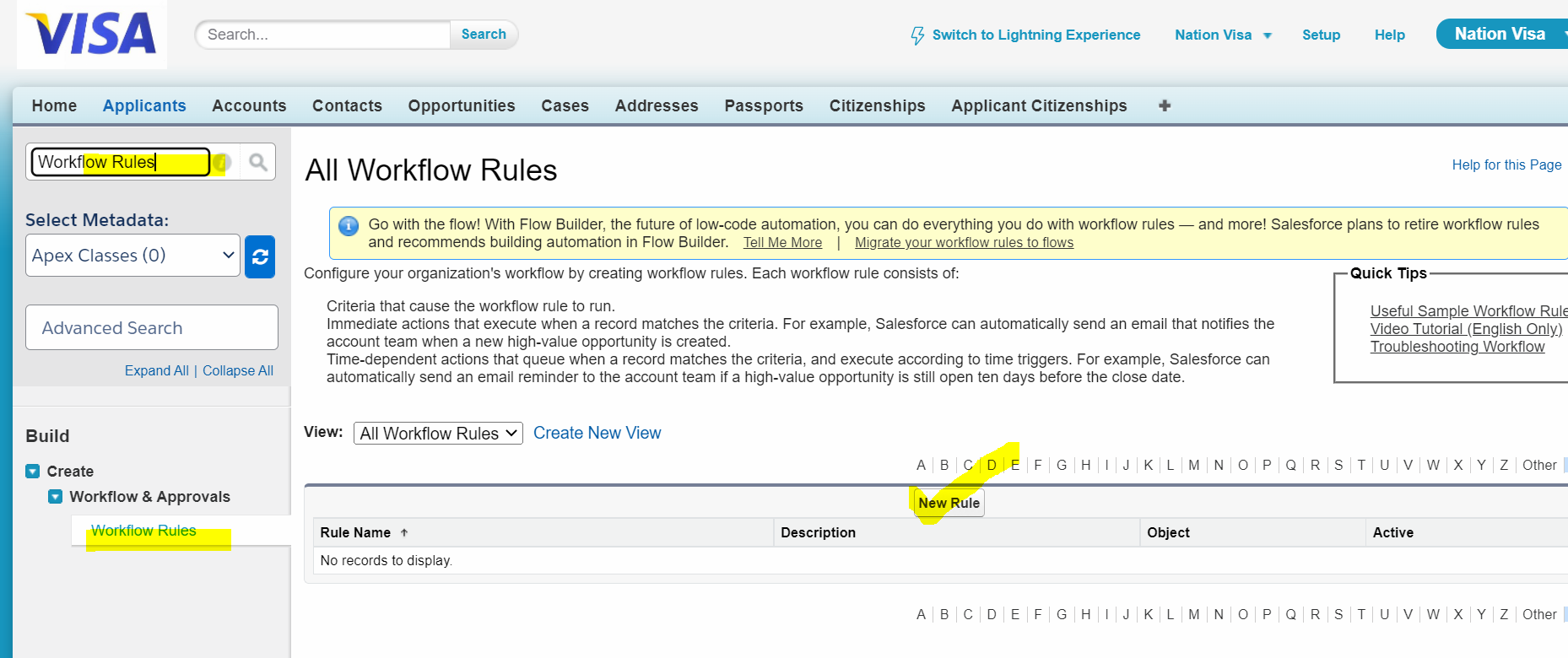
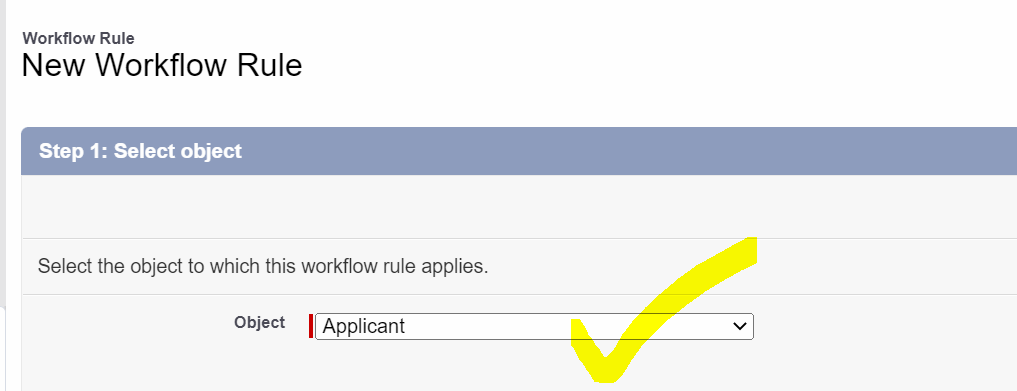
24. Basics of Workflow Rules, Task, Email Alert - 28 March 2022

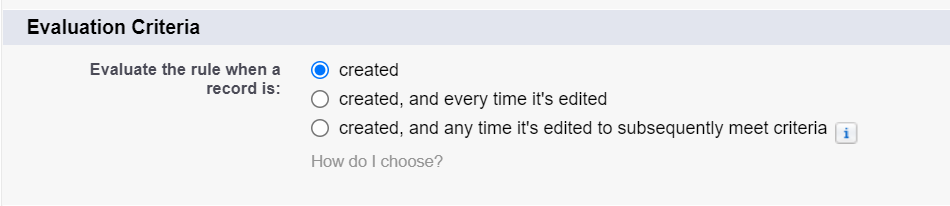
Workflow Rule is used to automate the business process.

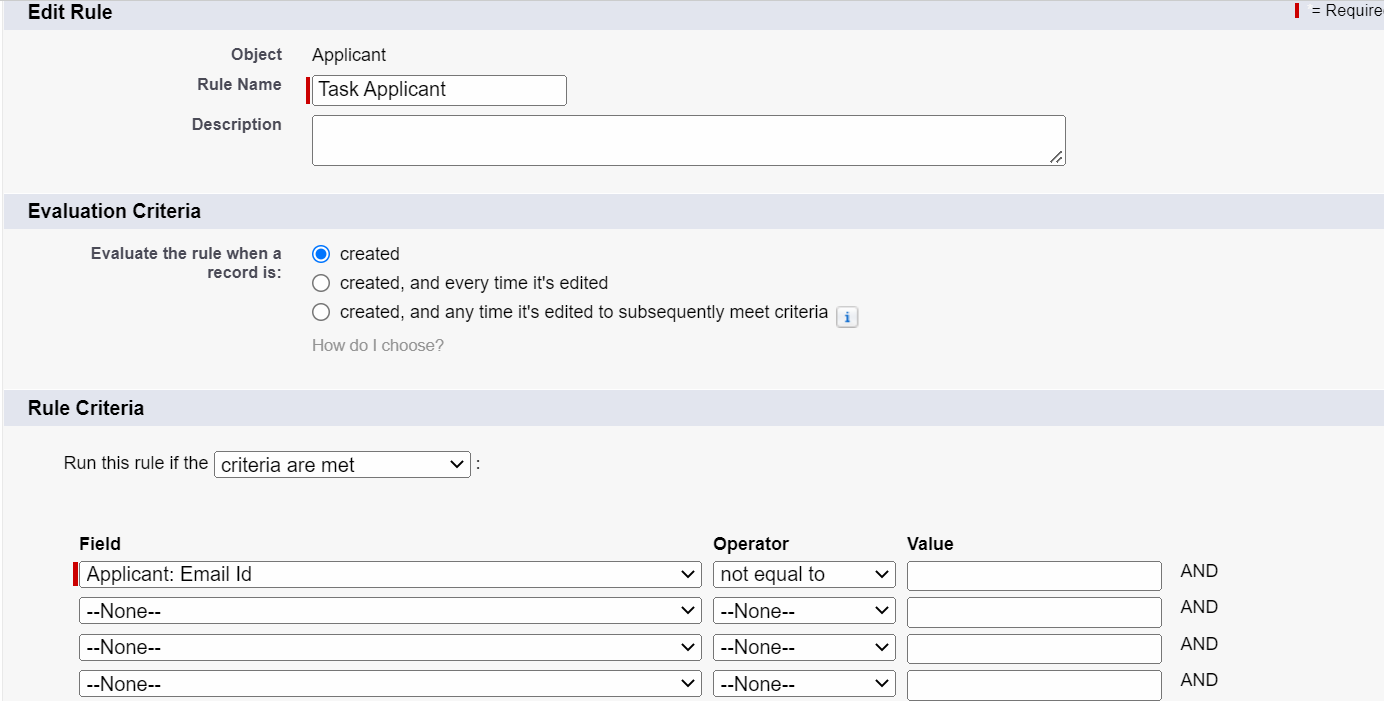
**OR**

Workflow lets you automate standard internal procedures and processes to save time across your org. A workflow rule is the main container for a set of workflow instructions. These instructions can always be summed up in an if/then statement.

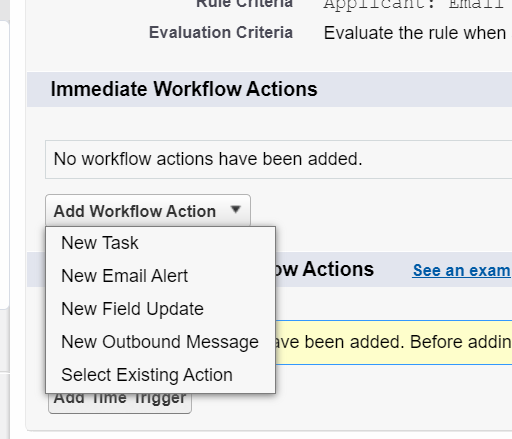


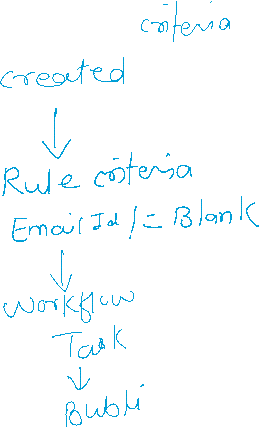
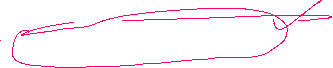
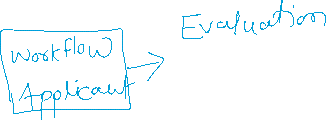




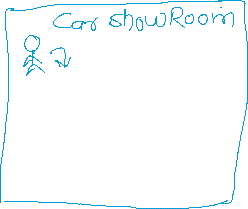


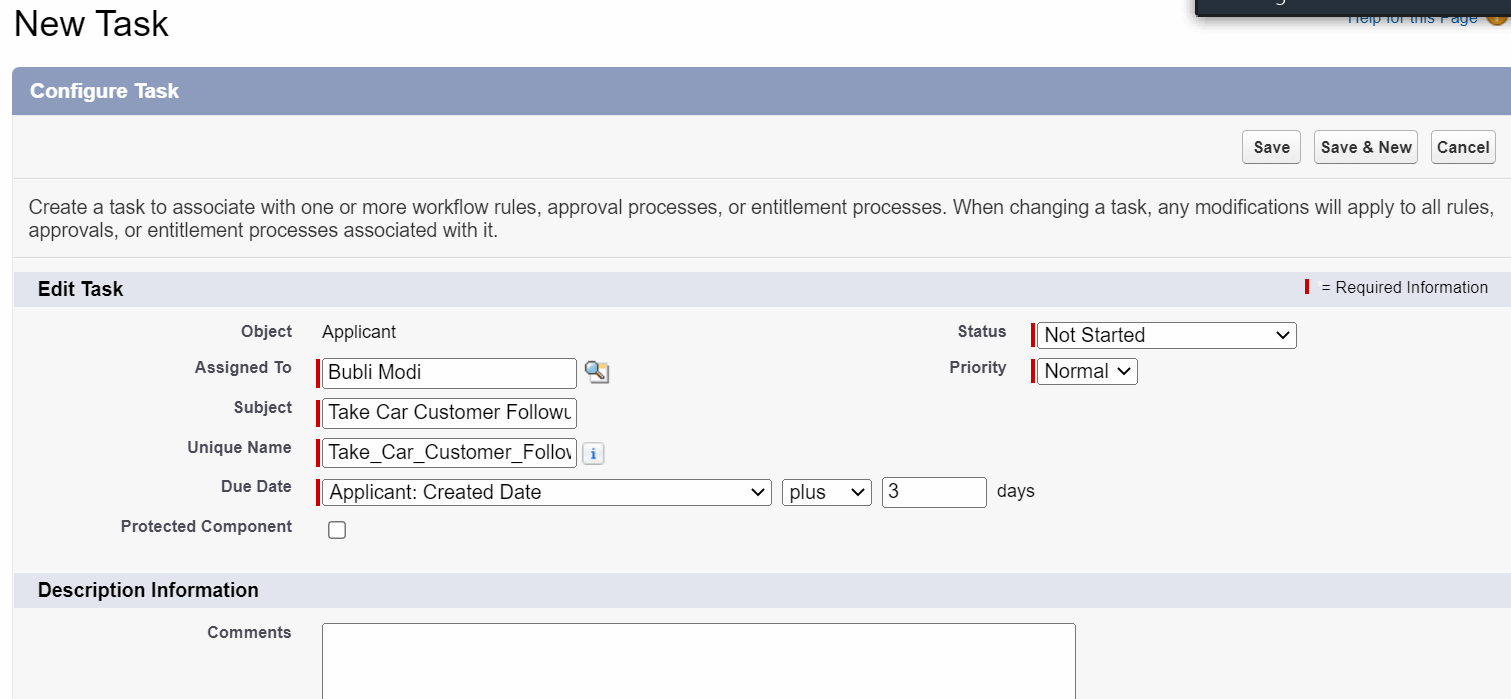
Workflow Actions:

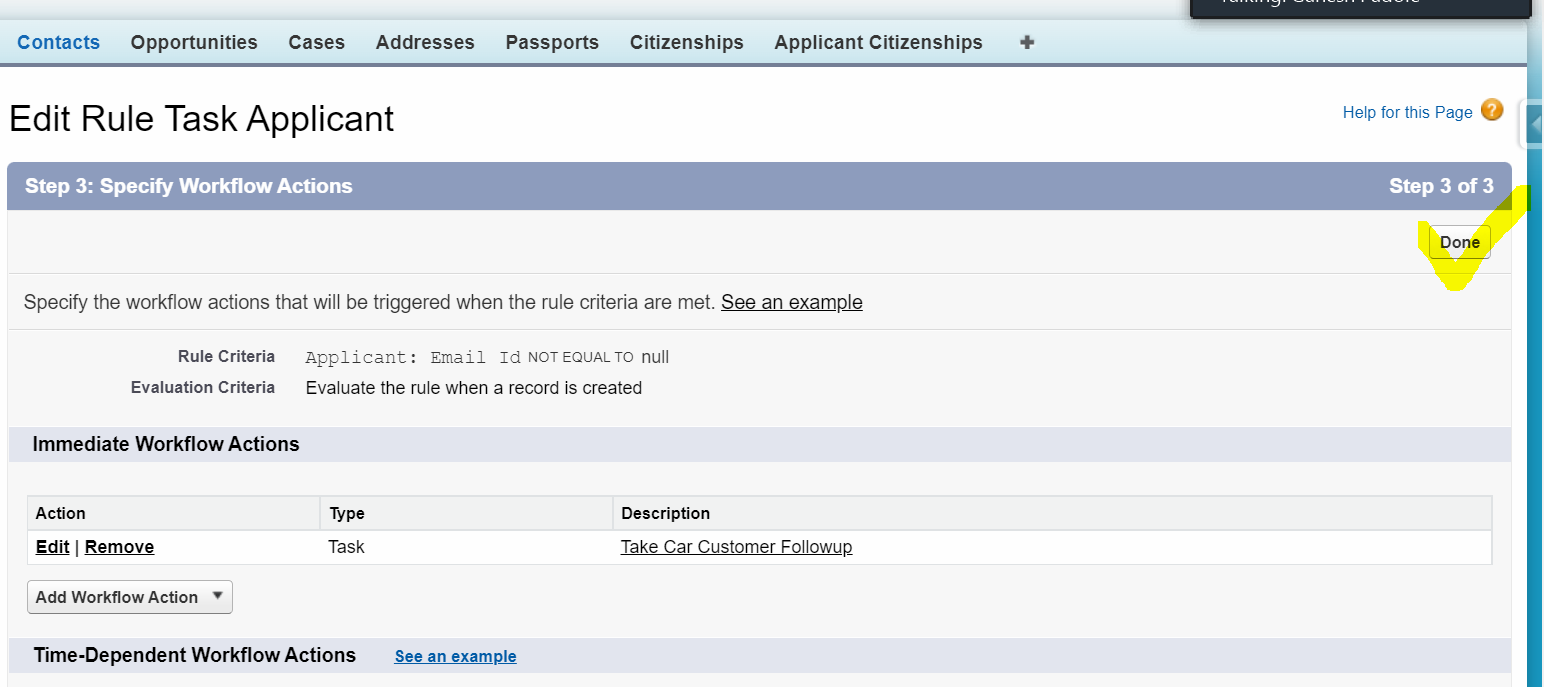


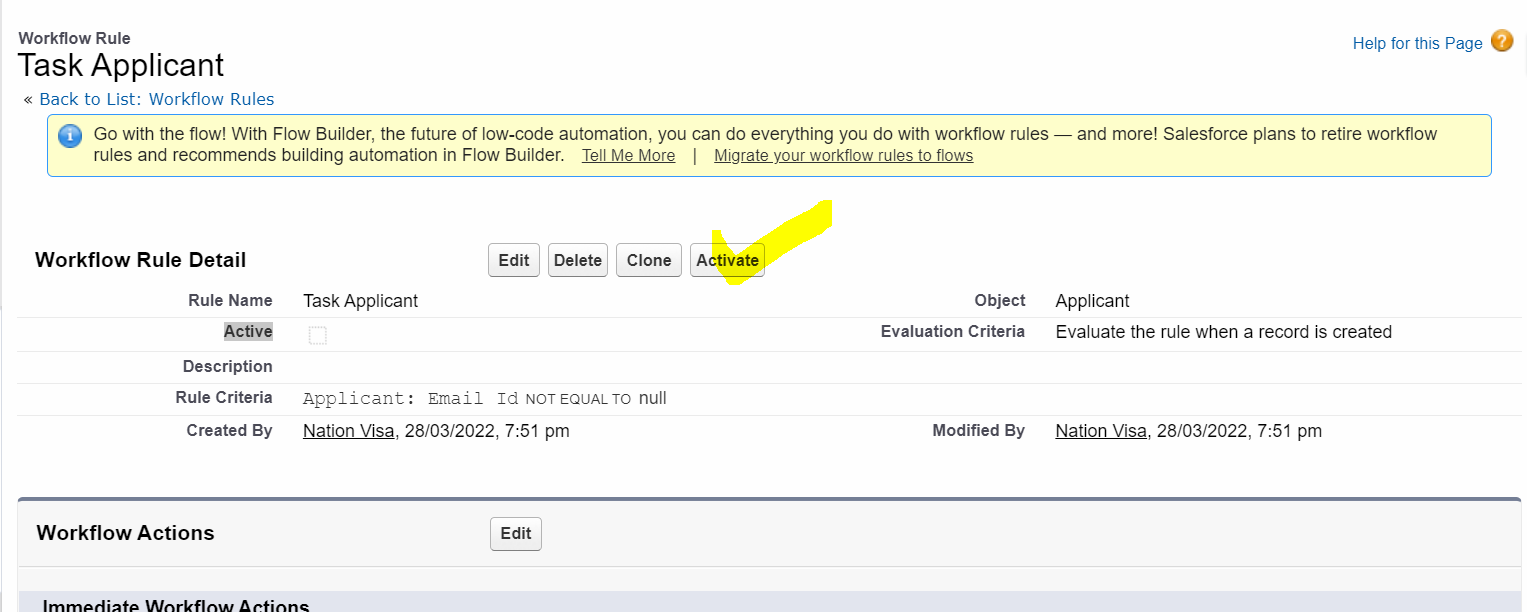


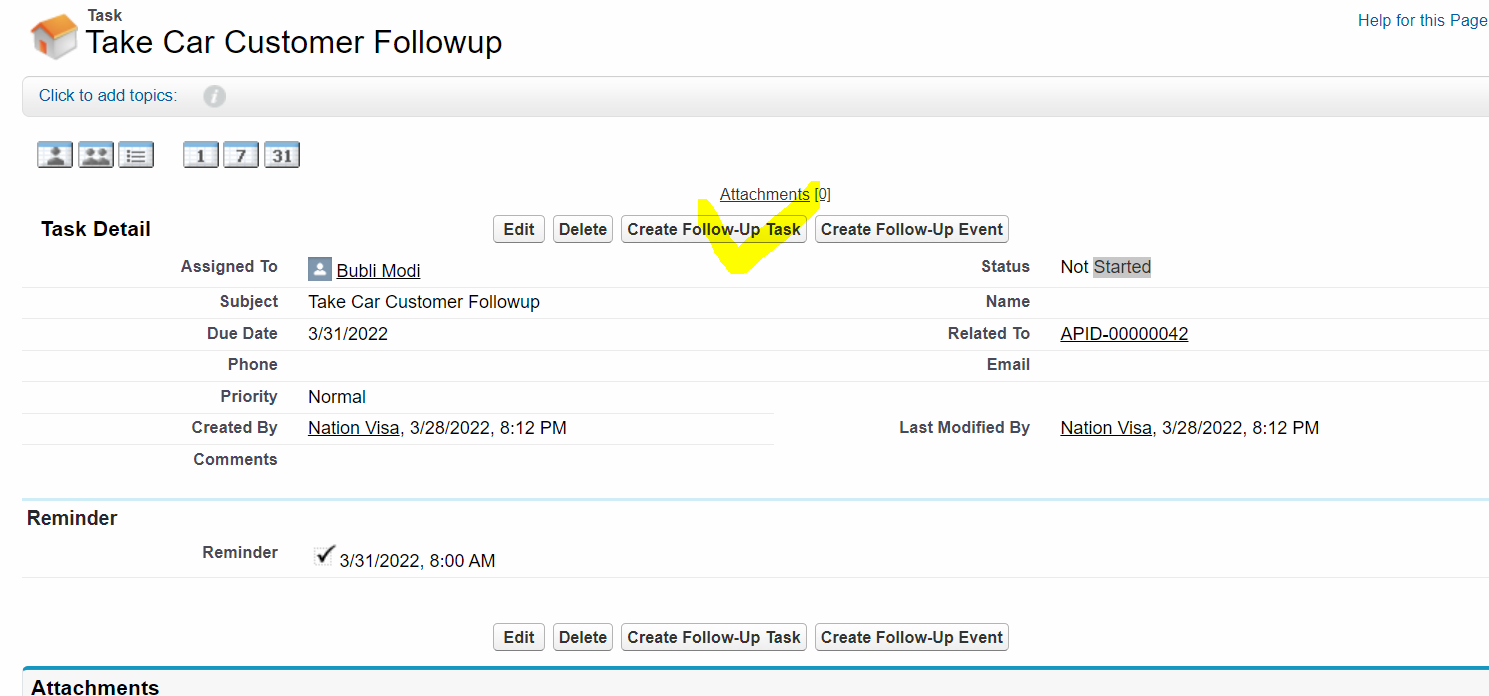
1] New Task

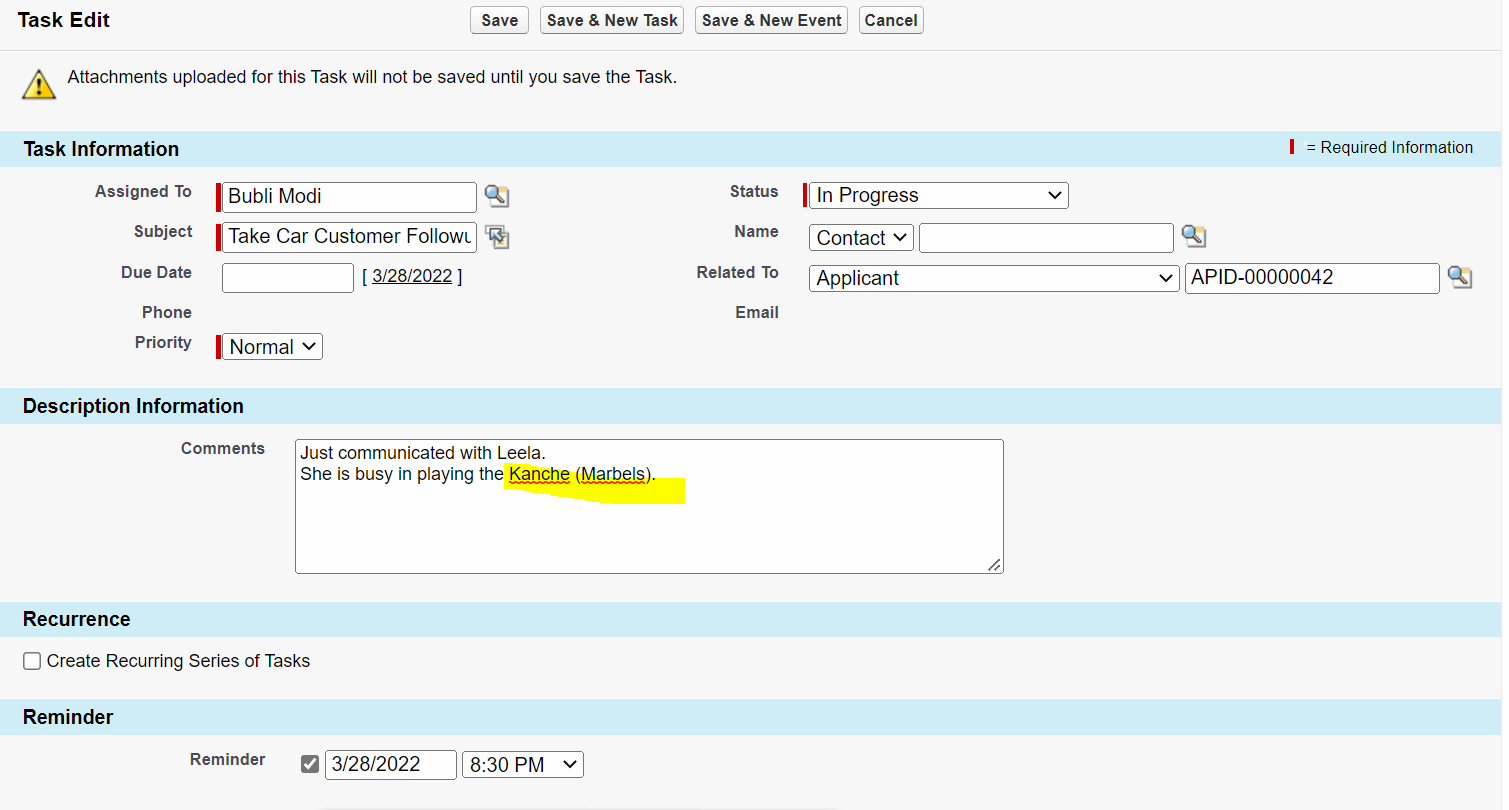


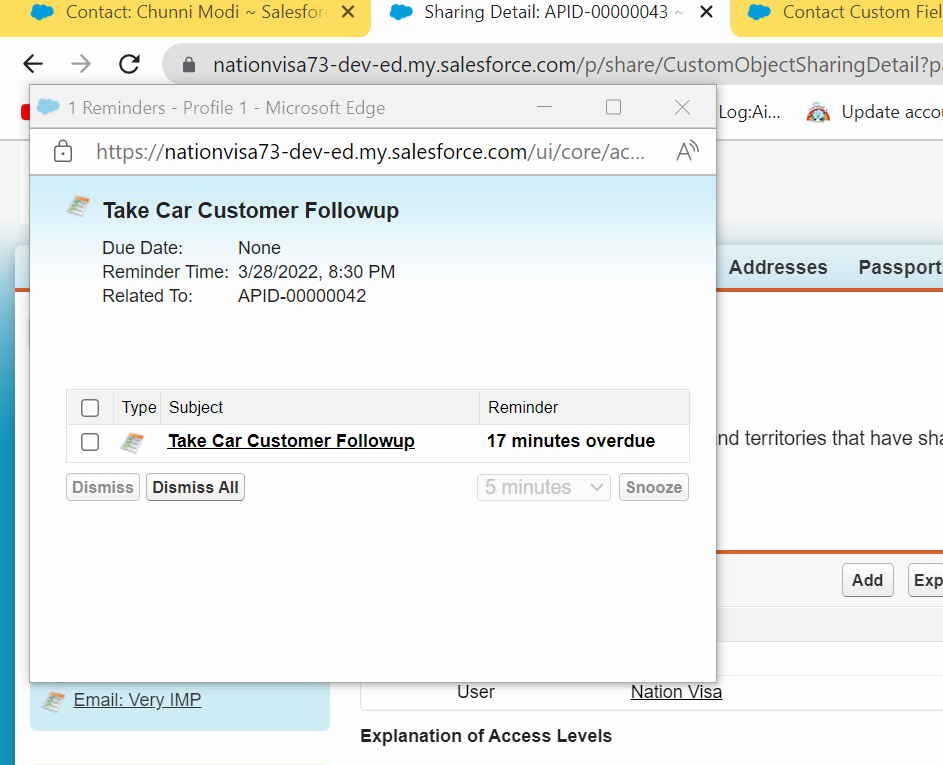




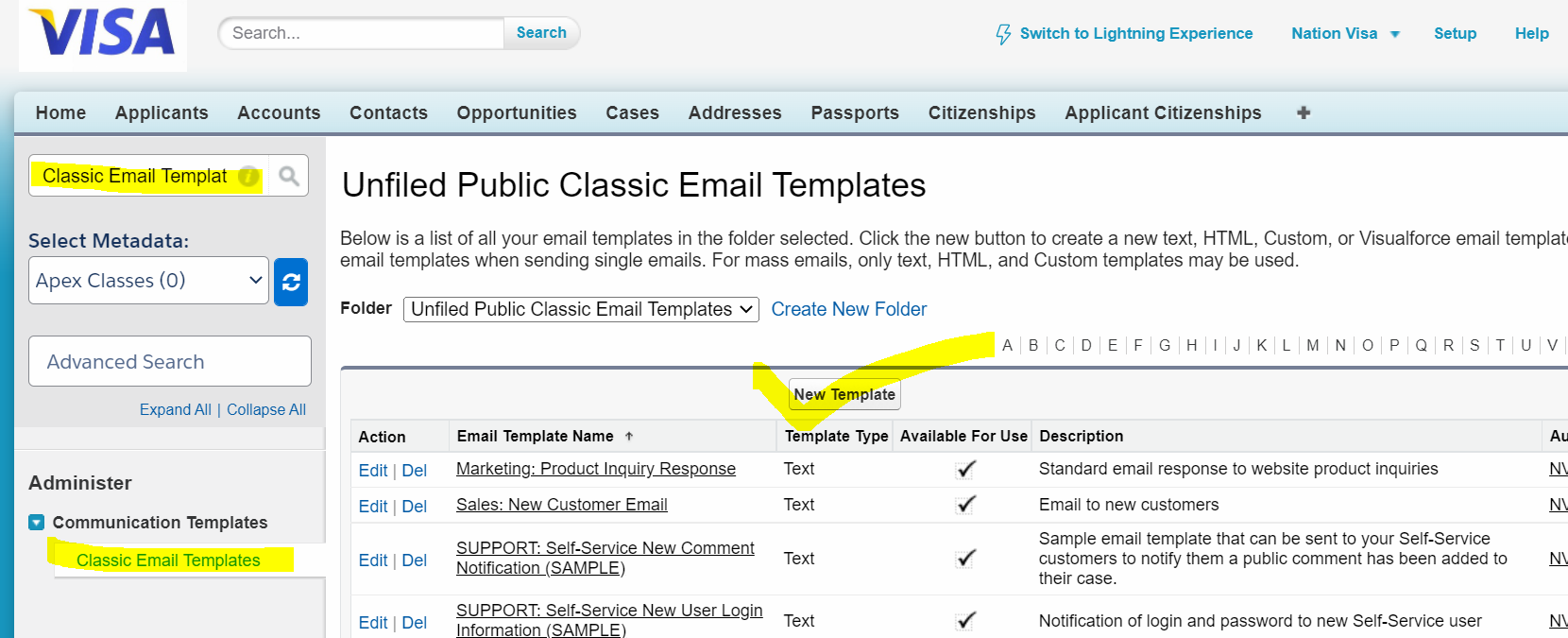


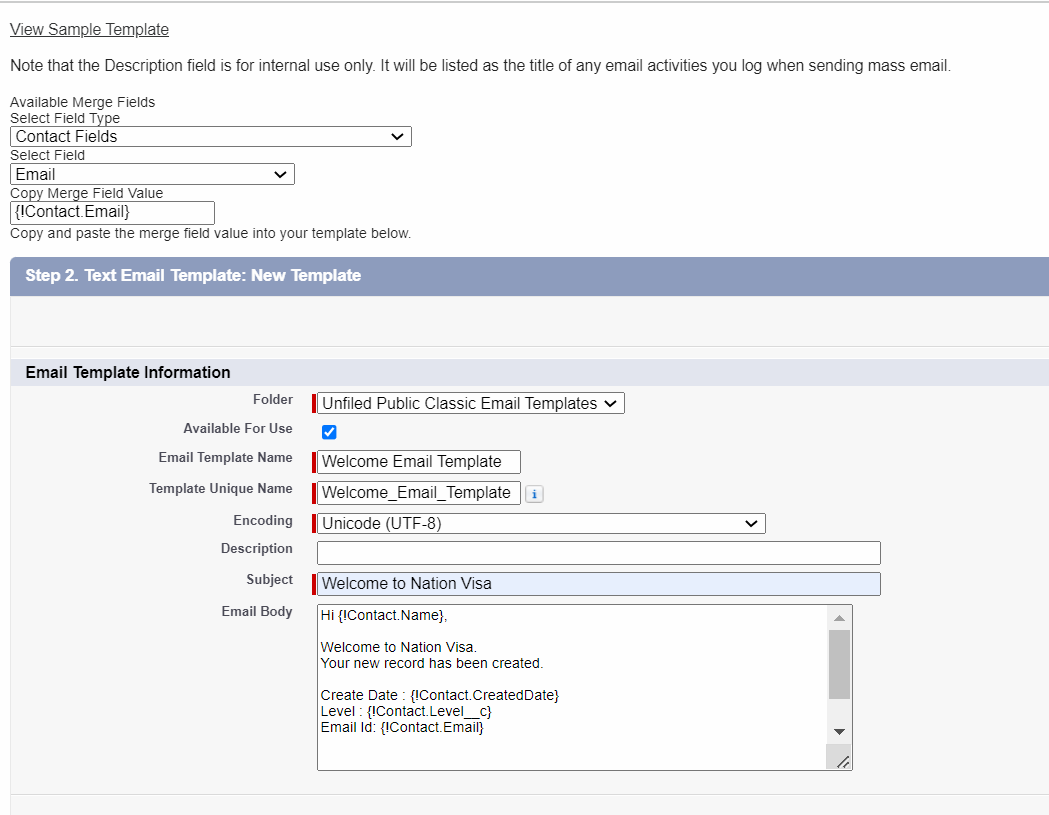






2] Workflow Action = Email Alert







User Story : Send an Email Alert to Contact whenever a new Contact is created.

Condition: 1] Email Should not be blank

2] Level = Primary or Secondary

4] Month of birthdate should be on “April” or “September”.

1 AND (2 OR 3) AND (4 OR 5) 🡪 AND (1, OR(2,3), OR (4,5))

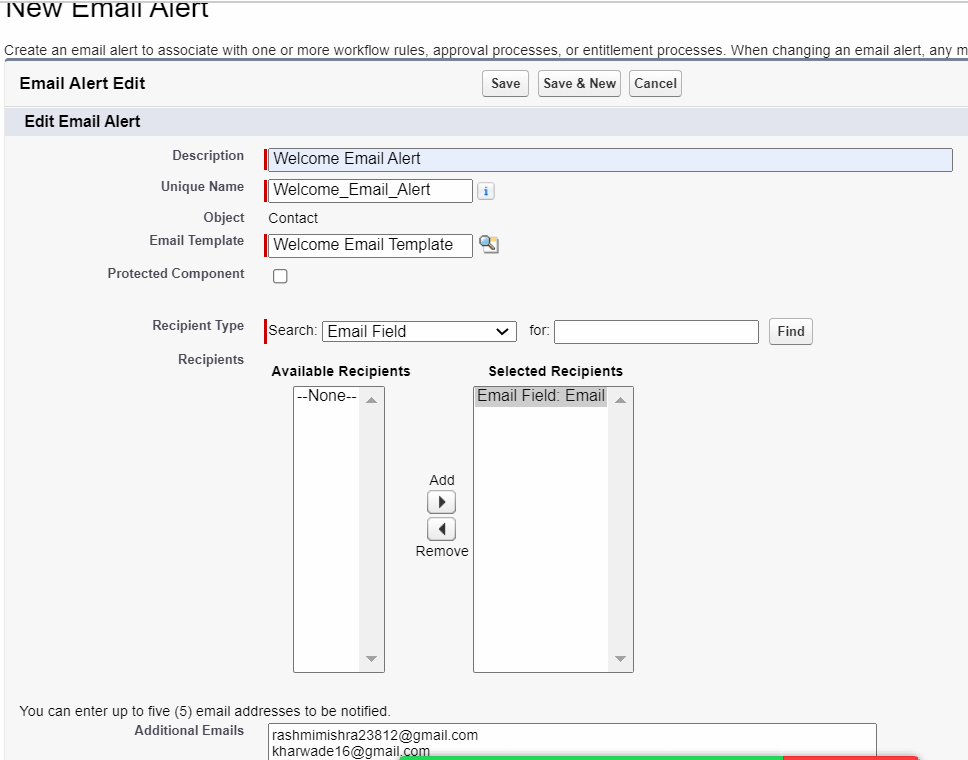
AND ( NOT( ISBLANK(Email)) ,

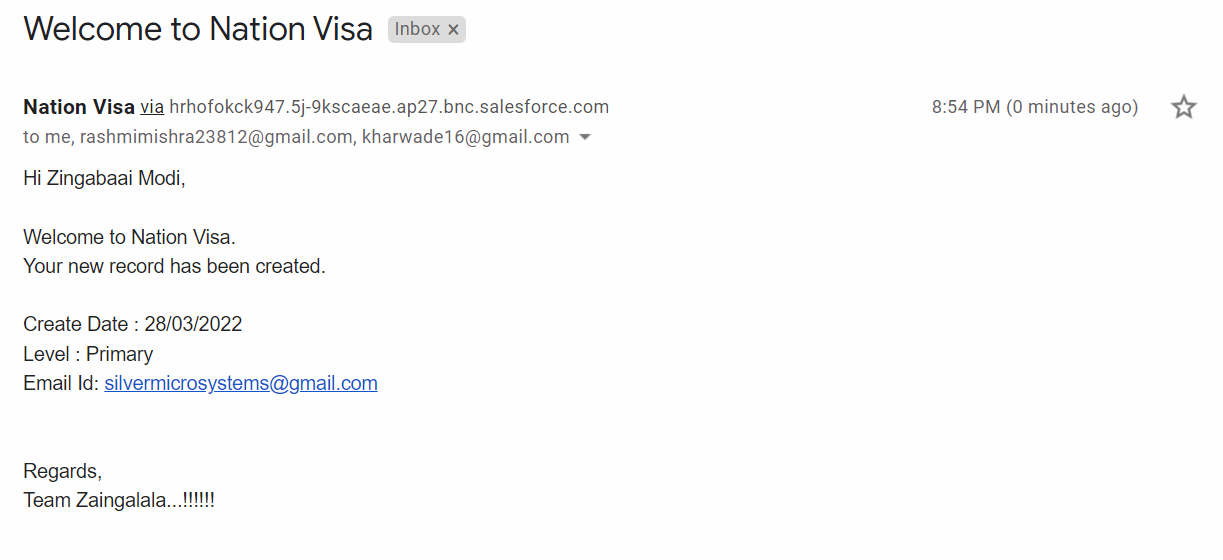
OR( ISPICKVAL( Level\_\_c , 'Primary') , ISPICKVAL( Level\_\_c , 'Secondary')),

OR ( MONTH( Birthdate) = 4 , MONTH( Birthdate) = 9 ))









Patapat :

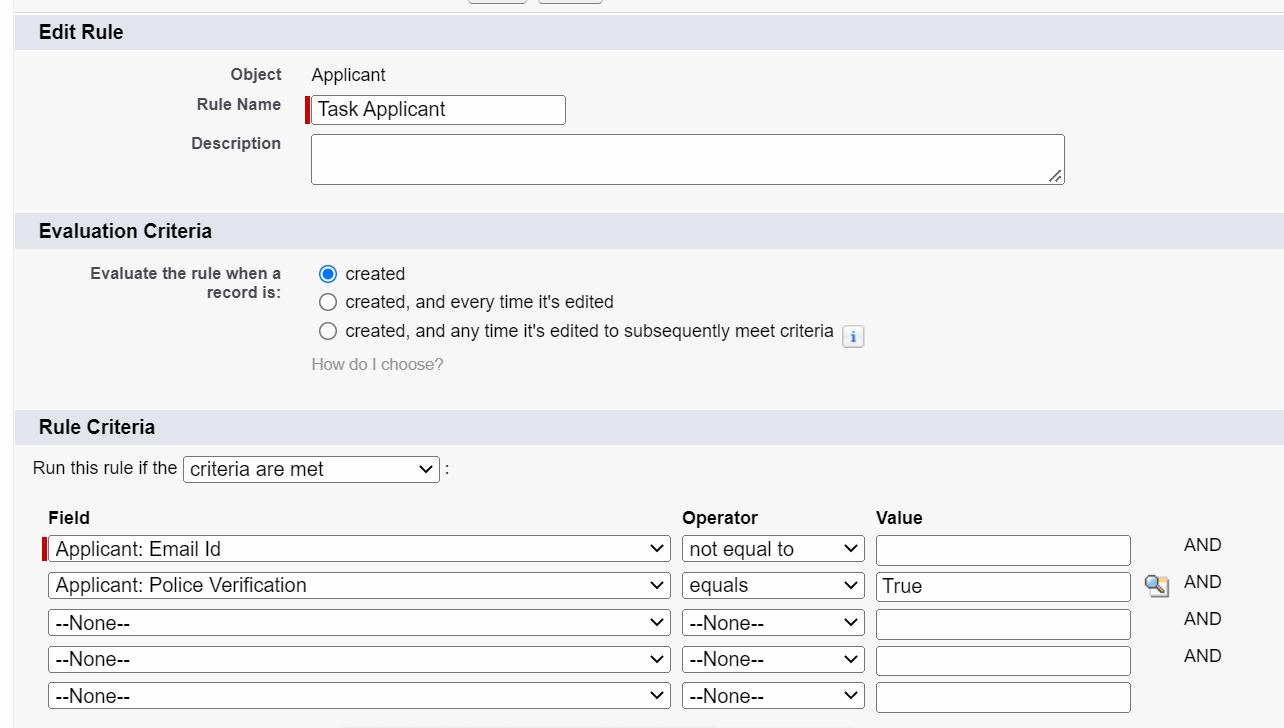
Send welcome email to Applicant.

And Update Email to Applicant.

Condition:

1] Email ID Should not be blank

2] Applicant should be eligible for Police Verification.



AND( NOT( ISNEW() ),

NOT(ISBLANK( Email\_Id\_\_c ) ),

Police\_Verification\_\_c = True

)

