



# EXAMPLES OF WORKFLOW RULES

## Summary

Looking for ideas on how workflow rules can help streamline your business? Check out these examples.

## Workflow Rule Examples

---

Looking for ideas on how workflow rules can help streamline your business? Check out these examples.

### Business Processes

- [Follow Up Before Contract Expires](#)
- [Follow Up when Platinum Contract Case Closes](#)
- [Assign Credit Check for New Customer](#)
- [Notify Account Owner About New, High-Priority Cases](#)
- [Set a Default Entitlement for Each New Case](#)
- [Update Shipment Status if Shipment is Delayed](#)
- [Automatically Activate New Users](#)

### Cross-Object Processes

- [Notify Sales VP About Cases Filed for Top Accounts](#)
- [Set Default Opportunity Name](#)
- [Set Target Resolution Date for Cases](#)
- [Update Application Record when Candidate Accepts Job](#)

### Deal Management

- [Track Closed Opportunities](#)
- [Override Default Opportunity Close Date](#)
- [Report Lost Opportunities](#)
- [Report Unassigned Leads](#)
- [Send Alert if Quote Line Item Discount Exceeds 40%](#)

### Notifications

- [Notify Key People About Account Owner Changes](#)
- [Set Reminder for Contact Birthday](#)
- [Set Reminder for High-Value Opportunity Close Date](#)
- [Notify Account Owner of Updates by Others](#)

## Follow Up Before a Contract Expires

|                    |   |
|--------------------|---|
| <b>Object</b>      | Contract  |
| <b>Description</b> | Email a reminder to the renewal manager 20 days before a contract's end date. |

|                               |  |
|-------------------------------|--|
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: created, and any time it's edited to subsequently meet criteria.                                     |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following criteria is met.<br><div>(Contract: Status equals Activated)</div>  |
| <b>Immediate Actions</b>      | None   |
| <b>Time-Dependent Actions</b> | 20 Days Before Contract: End Date—Email Alert: Email a reminder to the renewal manager to confirm whether the client wants an extension. |

## Follow Up When a Platinum Contract Case Closes

This example assumes that a `Contract Type` custom picklist is used to identify the contract level on cases and that the picklist contains the Platinum value.

|                               |  |
|-------------------------------|--|
| <b>Object</b>                 | Case   |
| <b>Description</b>            | If the customer has a platinum contract agreement, email a feedback request to the case contact 7 days after a high-priority case has been closed.                           |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: created, and any time it's edited to subsequently meet criteria.   |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following criteria are met.<br><div>(Case: Priority equals High) and<br/>(Case: Closed equals True) and<br/>(Case: Contract Type equals Platinum)</div> |
| <b>Immediate Actions</b>      | None   |
| <b>Time-Dependent Actions</b> | 7 Days After Case: Date/Time Closed—Email Alert: Email a feedback request to the case contact.   |

## Assign Credit Check for a New Customer

This example assumes that a `New Customer` custom field is on opportunities.

|                            |   |
|----------------------------|---|
| <b>Object</b>              | Opportunity   |
| <b>Description</b>         | Assign the Accounts Receivable (AR) department a task to check the credit of a potential customer 15 days before the opportunity close date if the amount is greater than \$50,000. |
| <b>Evaluation Criteria</b> | Evaluate the rule when a record is: created, and any time it's edited to subsequently meet criteria.  |

**Rule Criteria (Filter)** Run this rule if the following criteria are met.

```
(Opportunity: Amount greater than 50000) and
(Opportunity: Closed equals False) and
(Opportunity: New Customer equals True)
```

**Immediate Actions** None

**Time-Dependent Actions** 15 Days Before Opportunity: Close Date—Task: Create a task for users in the Accounts Receivable role to run a credit check.

## Notify Account Owner About New, High-Priority Cases

This example assumes that a Service Level Agreement custom picklist called SLA identifies the agreement level on accounts and contains the Platinum value.

**Object** Case

**Description** Notify the account owner when a high-priority case is created for accounts with a platinum SLA.

**Evaluation Criteria** Evaluate the rule when a record is: `created`.

**Rule Criteria (Filter)** Run this rule if the following criteria are met.

```
(Case: Priority equals High) and
(Account: SLA equals Platinum)
```

**Immediate Actions** Email Alert: Email the details of the high-priority case to the account owner.

**Time-Dependent Actions** None

## Set a Default Entitlement for Each New Case

This example assumes that an active, autolaunched flow looks up the relevant entitlement based on the account, asset, or contact associated with the new case and updates the case with the entitlement name.

The pilot program for flow trigger workflow actions is closed. If you've already enabled the pilot in your org, you can continue to create and edit flow trigger workflow actions. If you didn't enable the pilot in your org, use the [Flows action](#) in Process Builder instead.

**Object** Case

**Description** Set a default entitlement on each new case.

**Evaluation Criteria** Evaluate the rule when a record is: `created`.

**Rule Criteria (Filter)** Run this rule if the following criteria is met.

```
(Case: Status not equal to Closed)
```

**Immediate Actions** **Flow Trigger:** Look up and assign the relevant entitlement to the case. Pass the account, asset, or contact associated with the new case into the relevant flow variable to enable the entitlement lookup. Pass the case ID into the relevant flow variable to enable the case update.

**Time-Dependent Actions** None.

## Update Shipment Status If Shipment Is Delayed

|                               |   |
|-------------------------------|---|
| <b>Object</b>                 | Shipment  |
| <b>Description</b>            | Update the <code>Shipment Status</code> field to Delayed if a shipment has exceeded the expected delivery date and hasn't reached the customer. |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> , and any time it's edited to subsequently meet criteria.                              |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following criteria is met.<br><div>(Shipment: Status not equal to Delivered)</div>   |
| <b>Immediate Actions</b>      | None  |
| <b>Time-Dependent Actions</b> | 1 day after Shipment: Expected Delivery Date— <b>Field Update:</b> Change <code>Shipment Status</code> field to Delayed on Shipment record.     |

## Automatically Activate New Users

|                               |   |
|-------------------------------|---|
| <b>Object</b>                 | User  |
| <b>Description</b>            | Make sure that each new user is active so that the user can log in to Salesforce.         |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> .                                |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following criteria is met.<br><div>(User: Active equals False)</div> |
| <b>Immediate Actions</b>      | <b>Field Update:</b> Set Active to True.  |
| <b>Time-Dependent Actions</b> | None.   |

## Notify Sales VP About Cases Filed for Top Accounts

This workflow rule is for sales VP who want to know about cases filed for top accounts. Top accounts are determined by size and revenue.

|                               |   |
|-------------------------------|---|
| <b>Object</b>                 | Case  |
| <b>Description</b>            | Notify sales VP about cases filed for top accounts.   |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> .  |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following criteria are met.<br><div>AND (Account.AnnualRevenue &gt; 500000,<br/>Account.NumberOfEmployees &gt; 5000)</div> |
| <b>Immediate Actions</b>      | Email Alert: Notify VP about cases for large accounts.  |
| <b>Time-Dependent Actions</b> | None  |

## Set Default Opportunity Name

The opportunity naming convention for some companies is *Account Name: Opportunity Name*. To automate the default name of each opportunity in your org, create the following workflow rule.

|                               |   |
|-------------------------------|---|
| <b>Object</b>                 | Opportunity   |
| <b>Description</b>            | Enforce opportunity naming convention.  |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> , and every time it's edited.                        |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following criteria is met.<br><div>NOT (CONTAINS ( Name, Account.Name ))</div>           |
| <b>Immediate Actions</b>      | Field Update: Set opportunity name to the following formula.<br><div>Account.Name &amp; ": " &amp; Name</div> |
| <b>Time-Dependent Actions</b> | None  |

## Set Target Resolution Date for Cases

This example sets a case resolution date based on the value of a field on the associated account. It uses a custom picklist field on accounts called `Support Level`, which has three values: Basic, Standard, and Premium. It also has a custom date field on cases called `Target Resolution Date`.

Use the following three workflow rule examples to set the target resolution date of a case based on the support level for the related account.

### Set Resolution Date for Basic Support

|               |      |
|---------------|------|
| <b>Object</b> | Case |
|---------------|------|

|                               |  |
|-------------------------------|--|
| <b>Description</b>            | Set the case target resolution date for accounts that have basic support level to 30 days from today.        |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> .   |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following formula is true.<br><div>ISPICKVAL (Account.Support_Level__c , "Basic")</div> |
| <b>Immediate Actions</b>      | Field Update: Set the Target Resolution Date to Today() + 30.  |
| <b>Time-Dependent Actions</b> | None   |

**Set Resolution Date for Standard Support**

|                               |   |
|-------------------------------|---|
| <b>Object</b>                 | Case  |
| <b>Description</b>            | Set the case target resolution date for accounts that have standard support level to 14 days from today.        |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> .  |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following formula is true.<br><div>ISPICKVAL (Account.Support_Level__c , "Standard")</div> |
| <b>Immediate Actions</b>      | Field Update: Set the Target Resolution Date to Today() + 14.   |
| <b>Time-Dependent Actions</b> | None  |

**Set Resolution Date for Premium Support**

|                               |  |
|-------------------------------|--|
| <b>Object</b>                 | Case   |
| <b>Description</b>            | Set the case target resolution date for accounts that have premium support level to 5 days from today.         |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> .   |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following formula is true.<br><div>ISPICKVAL (Account.Support_Level__c , "Premium")</div> |
| <b>Immediate Actions</b>      | Field Update: Set the Target Resolution Date to Today() + 5.   |
| <b>Time-Dependent Actions</b> | None   |

## Update Application Record When Candidate Accepts Job

This workflow rule closes the Application record when a candidate accepts the job. Cross-object field updates to the master record are supported between custom objects in a master-detail relationship.

|                               |  |
|-------------------------------|--|
| <b>Object</b>                 | Candidate  |
| <b>Description</b>            | Change the <code>Application Status</code> field to Closed for the custom Application object when the <code>Candidate Status</code> field for the custom Candidate object changes to Accepted. |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> , and any time it's edited to subsequently meet criteria.   |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following criteria is met.<br><div>(Candidate: Status equals Accepted)</div>  |
| <b>Immediate Actions</b>      | Field Update: Change the <code>Application Status</code> field to Closed on parent Application record.   |
| <b>Time-Dependent Actions</b> | None   |

## Track Closed Opportunities

This example assumes that a Closed Opportunities record type provides additional information to certain profiles.



**Note:** For information on record types, see [Tailor Business Processes to Different Users](#).

|                               |   |
|-------------------------------|---|
| <b>Object</b>                 | Opportunity   |
| <b>Description</b>            | Change the record type of closed-won opportunities.   |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> , and every time it's edited.  |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following criteria are met.<br><div>(Opportunity: Closed equals True) and<br/>(Opportunity: Stage equals Closed Won)</div> |
| <b>Immediate Actions</b>      | Field Update: Set the record type to Closed Opportunities.  |
| <b>Time-Dependent Actions</b> | None  |

## Override the Default Opportunity Close Date

|                               |  |
|-------------------------------|--|
| <b>Object</b>                 | Opportunity  |
| <b>Description</b>            | Override the default close date from the close of the quarter to 6 months after the opportunity is created.  |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <b>created</b> .   |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following criteria is met.<br><div>(Opportunity: Closed equals False)</div>   |
| <b>Immediate Actions</b>      | <b>Field Update:</b> Use the following formula to set the opportunity close date to 6 months after the creation date.<br><div>DATE ( YEAR (TODAY ( ) ) , (MONTH (TODAY ( ) ) + 6) , DAY (TODAY ( ) ) )</div> |
| <b>Time-Dependent Actions</b> | None   |

## Report Lost Opportunities

|                               |   |
|-------------------------------|---|
| <b>Object</b>                 | Opportunity   |
| <b>Description</b>            | Notify the VP of sales when a deal is lost if the stage was Proposal/Price Quote and the amount was greater than \$1 million.   |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <b>created, and every time it's edited</b> .  |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following formula is true.<br><div>AND ( ISCHANGED (StageName) ,<br/>ISPICKVAL (PRIORVALUE (StageName) , "Proposal/Price Quote" ) , ISPICKVAL (StageName , "Closed Lost" ) , (Amount &gt; 1000000) )</div> |
| <b>Immediate Actions</b>      | <b>Email Alert:</b> Notify the VP of sales role that the deal was lost.   |
| <b>Time-Dependent Actions</b> | None  |

## Report Unassigned Leads

This example assumes that all unassigned leads are placed in an unassigned leads queue by a leads assignment rule.

|               |      |
|---------------|------|
| <b>Object</b> | Lead |
|---------------|------|



|                               |  |
|-------------------------------|--|
| <b>Description</b>            | Ensure that unassigned leads are tracked in a timely manner by notifying the manager if a lead is not accepted in 2 days.                  |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> , and any time it's edited to subsequently meet criteria.                         |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following criteria is met.<br><div>Lead Owner equals Unassigned Lead Queue</div>                                      |
| <b>Immediate Actions</b>      | None   |
| <b>Time-Dependent Actions</b> | 2 Days After Lead: Last Modified Date—Email Alert: Notify the manager role that the queue has unassigned leads that are older than 2 days. |

## Send Alert If Quote Line Item Discount Exceeds 40%

|                               |  |
|-------------------------------|--|
| <b>Object</b>                 | Quote Line Item  |
| <b>Description</b>            | Ensure that an email alert is sent if a sales rep applies a quote line item discount that exceeds 40%.             |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> , and any time it's edited to subsequently meet criteria. |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following criteria is met.<br><div>Quote Line Item: Discount is greater than 40</div>         |
| <b>Immediate Actions</b>      | Email Alert: Notify the manager role that the quote line item discount exceeds 40%.                                |
| <b>Time-Dependent Actions</b> | None   |

## Notify Key People About Account Owner Changes

|                               |   |
|-------------------------------|---|
| <b>Object</b>                 | Account   |
| <b>Description</b>            | Notify key people in the sales department when the owner of an account changes if the account's annual revenue is greater than \$1 million. |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> , and every time it's edited.  |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following formula is true.<br><div>AND( ISCHANGED(OwnerId), AnnualRevenue &gt; 1000000 )</div>                         |
| <b>Immediate Actions</b>      | Email Alert: Notify the person in the sales operations role of the change in account ownership.   |

**Time-Dependent Actions** None

## Set Reminder for Contact Birthday

This example assumes that a `Next Birthday` custom formula field uses the following formula to calculate the date of the contact's next birthday on contact records.

```
IF (MONTH (Birthdate) >
MONTH (TODAY ()), DATE (YEAR (TODAY ()), MONTH (Birthdate), DAY (Birthdate)),
IF (MONTH (Birthdate) <
MONTH (TODAY ()), DATE (YEAR (TODAY ()) + 1, MONTH (Birthdate), DAY (Birthdate)),
IF (DAY (Birthdate) >=
(DAY (TODAY ())), DATE (YEAR (TODAY ()), MONTH (Birthdate), DAY (Birthdate)),
DATE (YEAR (TODAY ()) + 1, MONTH (Birthdate), DAY (Birthdate))))
```

|                               |   |
|-------------------------------|---|
| <b>Object</b>                 | Contact   |
| <b>Description</b>            | Send an email to the contact 2 days before the contact's birthday.  |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> .  |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following formula is true. <div> <pre>(Contact: Birthdate not equal to null) and (Contact: Email not equal to null)</pre> </div> |
| <b>Immediate Actions</b>      | None  |
| <b>Time-Dependent Actions</b> | 2 Days Before Contact: Next Birthday—Email Alert: Send a birthday greeting to the contact's email address.  |

## Set Reminder for High-Value Opportunity Close Date

|                               |   |
|-------------------------------|---|
| <b>Object</b>                 | Opportunity   |
| <b>Description</b>            | Remind the opportunity owner and senior management when the close date is approaching for an opportunity that has an amount greater than \$100,000. Create a follow-up task for the opportunity owner if the deal is still open when the close date passes. |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: <code>created</code> , and any time it's edited to subsequently meet criteria.  |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following criteria are met. <div> <pre>(Opportunity: Amount greater than 100000) and (Opportunity: Closed equals False)</pre> </div>   |
| <b>Immediate Actions</b>      | None  |

**Time-Dependent Actions**

- 30 Days Before Opportunity: Close Date—Email Alert: Notify the opportunity owner that 30 days remain.
- 15 Days Before Opportunity: Close Date—Email Alert: Notify the opportunity owner that 15 days remain.
- 5 Days After Opportunity: Close Date—Task: Create a follow-up task for the opportunity owner to update the deal. Email Alert: Notify senior management to involve executives.

## Notify Account Owner of Updates by Others

|                               |  |
|-------------------------------|--|
| <b>Object</b>                 | Account  |
| <b>Description</b>            | Notify the account owner when someone else updates the account if the account's annual revenue is greater than \$1 million.              |
| <b>Evaluation Criteria</b>    | Evaluate the rule when a record is: created, and every time it's edited.   |
| <b>Rule Criteria (Filter)</b> | Run this rule if the following formula is true.<br><div> AND( (LastModifiedById &lt;&gt; OwnerId), (AnnualRevenue &gt; 1000000) ) </div> |
| <b>Immediate Actions</b>      | Email Alert: Notify the account owner that someone else has updated the account.   |
| <b>Time-Dependent Actions</b> | None   |