Topic	Salesforce Automation
Created By	Siddharth Pandit (Salesforce Instructor)
Contact No.	+91 879 333 5440 / 988 12 988 13
Email	Siddharthpandit.salesforce@gmail.com
© Copyright 2013. All rights reserved	

1. Validation Rule:

Definition:

Validation rules are set, to make sure the Data / Records that inserted or updated by Users are in correct format. They always run whenever a record is created or updated in UI or using any API tool (like Data Loader). Validation rules must be satisfied in any case, it forces User to comply with the **Rule criteria**. Otherwise a predefined **Error Message** will be produced.

Note: Only active Validation rules are evaluated.

Path: Setup > Create > Objects > Click on the Object > Validation Rule > New

i. Rule Criteria:

A formula is defined in the rule criteria, which will be evaluated when new record is created or existing record is updated. If the rule return **TRUE** result then, an error message will be displayed on the page and record is prevented to be saved.

Example: Below Validation formula will trigger an error message if Phone number field is blank in Contact record.

isBlank(Phone)

ii. Error Message:

A MESSAGE is defined to be displayed as an error to the user, when user saves the record and the rule criteria returns TRUE result

iii. Hands-on Activities:

a. Create a Validation rule between two dates fields to make sure the End Date is any date up to 30 days from the Start Date

b. Create a Rule to make sure the Months of Start Date and End Date should be the same

c. Create a Rule to prevent User to keep Age field blank if the Experience Status field is "Experienced"

2. **Workflows**:

Definition:

Workflows are used to automate the business process. When rule return TRUE result, it triggers one or more of following actions: **Field Update, Send Email, Assign a Task, Outbound Messages**.

A Time Trigger is added, when the actions need to be performed after certain time period. Until the time these actions are scheduled to, they can be viewed in **Time-Based Workflow** queue under **Monitor**.

Note: Workflows should be activated before using by clicking "Activate" button on it. Active Workflows trigger their actions when criteria is met.

Path: Setup > Create > Workflows & Approvals > New Rule

i. Rule Evaluation Criteria:

a. **Created**

Run / evaluate the rule only when record is created

b. **Created, and every time it's edited**

Run / evaluate the rule when record is created or edited

c. **Created, and every time it's edited to subsequently meet the criteria**

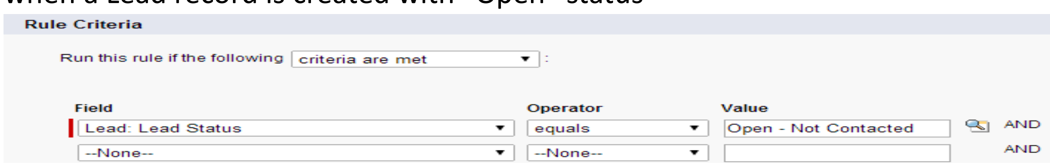
Run / evaluate the rule when the record is created.

Run / evaluate the rule when the record is edited and now is in "Met" condition from "Not Met"

ii. **Rule Criteria:**

A formula is defined, or the standard criteria (picklist) is used to create a rule criteria. When the rule returns TRUE result, workflow triggers all the actions associated with this rule

Example: Below is the example of workflow rule that triggers an action / actions when a Lead record is created with "Open" status



iii. **Actions:**

- **Time Independent Actions:**

  All the actions will be triggered immediately, once the rule return TRUE result

- **Time Dependent Actions:**

  All the actions will be triggered after the specified "Time Trigger" (# of hours or # of days). Till the time actions are residing in the Time-based workflow Queue.

Setup> Monitor > Time-based Workflow

b. **Field Update:**

Update a field with different value

c. **Send an email:**

Send an email notification to one or more users

d. **Assign a Task:**

Create a task and assign it to any user

e. **Outbound Messages:**

Send a message to other systems i.e Oracle, Siebel CRM etc.

iv. **Hands-on Activities:**

a. Set a Workflow to Update Experience Status field to “Experienced” if Teacher has age greater than 35

b. Set a Rule to capture date in the Start Date field, when a teacher starts Night-shift

c. Set a Rule to send an email to Admin user, when a lead record is created with Annual Revenue as 50,000

d. Add a time trigger to escalate a Lead record to manager, if there is no status update occur for next two day

3. **Assignment Rules:**

Definition:

1) An owner of a Lead or Case is assigned based on the criteria in the record
2) Are only used for Leads or Cases
3) Only runs when record is created or updated and **"Assign using active Assignment Rule"** checkbox is checked

Note: Can't use for any other Standard or Custom Objects

Path: Setup> Leads > Assignment Rules > New

i. **Rule Name:**

Define a Name for the Assignment Rule

Only one active rule at a time for Lead or Case object

ii. **Rule Entries:**

Under a rule, multiple entries can be defined with different criteria to assign records to different users

4. Auto-Response Rules:

Definition:

1) Are only used for Leads or Cases
2) An email notification is sent to Customers, who provide their details for Lead or Case object
3) Can be implemented for Web-To-Lead or Web-To-Case

Note: Can't use for any other Standard or Custom Objects

Path**: **Setup > Customize > Leads > Auto-Response Rules > New

i. **Rule Name:**

Define a Name for the Auto-Response Rule

Only one active Auto-response rule at a time

ii. **Rule Entries:**

Under a rule, multiple entries can be added with different criteria to send different email templates