



# WORKFLOW: AUTOMATING THE PROCESS

Many of the tasks you normally assign, the emails you regularly send, and other record updates are part of your organization's standard workflow and approval processes. Instead of doing this work manually, use Salesforce to automatically perform the actions you specify based on your organization's processes.

## Basic Concepts

### Workflow Tasks

- Workflow tasks contain the information a workflow rule uses when assigning tasks to users based on the business actions that trigger the rule.
- Workflow tasks are like templates that determine the **subject**, **status**, **priority**, and **due date** of the tasks that a workflow rule creates.

### Workflow Alerts

- Workflow alerts are emails generated by a workflow rule whenever specific business actions trigger the rule. Use email templates for your workflow alerts.
- Workflow alerts determine the email template and recipients of the email generated by a workflow rule.

### Workflow Field Updates

- Workflow field updates change the value of a field to a value you specify. You can specify a value based on a formula that uses the values of other fields.

### Workflow Outbound Messages

- Outbound messages send the information you specify to an endpoint you designate. Use outbound messages to send a message to an external service.

### Workflow Rules Use Workflow Actions

- Workflow rules perform any workflow actions when records meet specified criteria. For example, a workflow rule can trigger a task, alert, field update, and outbound message.

### Approval Processes Use Workflow Actions

- Approval processes also perform any workflow actions when records meet specified criteria. For example, an approval process can send an email requesting approval.

### The Big Picture

- 1 Build email templates that you plan to use in workflow alerts.
- 2 Create workflow alerts that use your email templates.
- 3 Create workflow tasks.
- 4 Define workflow field updates.
- 5 Define outbound messages.
- 6 Create workflow rules and approval processes that use your workflow alerts, tasks, field updates, outbound messages, or any combination of these actions.

## Creating Workflow Tasks

Create workflow tasks before creating the workflow rules or approval processes that use them. To get started creating workflow tasks, click **Setup | Customize | Workflow & Approvals | Tasks | New Task**.

- The type of record you choose determines the rules that you can associate with the workflow task. Workflow tasks can only be associated with workflow rules or approval processes of the same type of record: contact, account, lead, and so on.
- If you assign a workflow task to a sales team role containing more than one person, the owner of the record that triggered the rule becomes the task assignee.
- If a workflow task is assigned to a role containing more than one person, the owner of the record that triggered the rule becomes the task assignee.
- Workflow tasks assigned to an empty role are assigned to the record owner.

### Workflow Task Details

- **Assigned To:** owner of task
- **Status:** current state of task
- **Subject:** description of task
- **Priority:** urgency of task
- **Due Date:** expected completion
- **Notify Assignee:** email owner of task
- **Comments:** added comments

## Creating Workflow Alerts

Create workflow alerts before creating the workflow rules or approval processes that use them. To get started creating workflow alerts, click **Setup | Customize | Workflow & Approvals | Email Alerts | New Alert**.

- Add additional recipients that are not internal users.
- Unlike workflow tasks, workflow alerts that are set up to email a role occupied by more than one person will send an email to each person in that role.
- Insert a link to your case or opportunity using merge fields in email templates.

### Best Practices

- Before deleting a workflow alert, check if any workflow rules or approval processes are using it.
- Create a standardized letterhead to use for all the email templates you use for workflow alerts.



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## Defining Field Updates

To get started creating field updates, click **Setup | Customize | Workflow & Approvals | Field Updates | New Field Update**.

- Create field updates for standard or custom objects.
- To use a formula, avoid choosing a checkbox or picklist field because updates based on formulas are not supported for these field types.
- Use the same operators and functions you use for custom formula fields when your field update is based on a formula.
- To replace a field's value with a blank value, make sure the field is not required.

### Best Practices

- Avoid associating more than one field update with a rule or approval process that applies different values to the same field.
- Before you begin, check the type of the field you want to update. Read-only fields like formula or auto-number fields are not available for field updates.
- Before deleting a field update, check if any workflow rules or approval processes use it.
- Give field updates a description that makes it easy for other users to tell what it does.

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## Defining Outbound Messages

To get started creating outbound messages, click **Setup | Customize | Workflow & Approvals | Outbound Messages | New Outbound Message**.

- If you do not see these options, your organization may not have outbound messaging enabled. Contact salesforce.com to enable outbound messaging.
- You can include the session ID in your outbound message.
- Create outbound messages for standard or custom objects.
- Outbound messages are sent as a Salesforce user. Determine the user to use when sending your outbound message.

### Best Practices

- Before deleting an outbound message, check if any workflow rules or approval processes use it.
- Give field updates a description that makes it easy for other users to tell what it does.

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## Creating Workflow Rules

Create workflow rules and associate them with your workflow alerts, tasks, field updates, and outbound messages. To get started creating workflow rules, click **Setup | Customize | Workflow & Approvals | Workflow Rules | New Rule**.

- You can associate workflow rules with any action such as a task or alerts.
- Any changes a user makes can trigger rules--even changes to hidden fields.
- Saving or creating records can sometimes trigger more than one rule.
- Your sharing model may prevent users from viewing records associated with workflow tasks.

### Best Practices

- Distinguish your workflow-generated tasks from other tasks by starting the subject with some workflow notation.
- Before deleting a workflow task, check if any workflow rules or approval processes are using it.

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## Creating Approval Processes

Create approval processes that use the workflow actions you have created. To get started creating approval processes, click **Setup | Customize | Workflow & Approvals | Approval Processes**.

- Approval processes are different than workflow rules in that users must submit a record for approval whereas workflow rules perform actions automatically.
- See the *Getting Started with Approvals* tip sheet for more information on creating approval processes.

### Best Practices

- Design workflow actions so that you can use them for both workflow rules and approval processes.
- Before you begin creating an approval process, draw a diagram of the steps in your approval process.