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The Whys and Hows of Salesforce Workflow

Index

What is Workflow and Why Businesses need it

Workflow is a native tool in Salesforce Enterprise edition and Salesforce Unlimited Edition. The tool allows users to apply business logic when records are created or edited, and trigger automated action, such as sending a notification email, creating a task, or updating a field, provided the record matches the set criteria.

In its bare essence, Workflow is a logic tool. However, the tool is so potent and the benefits so great that many Salesforce users upgrade from a Professional edition to Enterprise or Unlimited edition for the sole reason of being able to access Salesforce Workflow.

Applying Salesforce Workflow helps the organization in many ways.

Workflow infuses life into inanimate records, allowing the record to “speak up” or do something, and in the process deliver productivity gains and accelerate the business process.

- Productivity wise, Workflow spares the user of constant monitoring using dashboards, views or reports, to check whether new records trigger specific conditions.
- Since Workflow automates the process, it does away with the time gap that comes when people have to monitor the process and trigger actions manually when the conditions are met. This not just accelerates the business process, but also improves accuracy, virtually doing away with mistakes and omissions that creep in in manual processes.
- Workflow helps the enterprise standardize their internal procedures in a big way. Many routine activities, such as sending out generic emails, updating records, and more, all parts of an organization’s standardized process, may be automated and made to function on auto-pilot.

In fact, when the business grows and the quantum of data being processed surges, Workflow may no longer be an option; but would become an inevitable implementation in any case.

The Possibilities with Workflow

Salesforce Workflow is a great way to automate business processes. The possibilities of using Workflow to trigger the desired actions are limited only by imagination. Some common use cases involving workflow are:

- Changing a field value automatically when two other fields on a record are updated in the right combination. For instance, updating shipment status if shipment is delayed, or activating new users automatically.
- Triggering an email after a specific number of days, following the updating of a record, as in sending a new prospect a reminder message, or a follow up message before a contract expires.
- Assigning a task to a Salesforce User to review or update a record when it reaches a certain stage. For instance, notify the Sales Vice-President about cases filed for top accounts.
- Track and report lost opportunities.

Applying Workflow rules makes it possible to enforce such processes easily, without writing any code or making any manual intervention.

Workflow complements marketing automation perfectly. For instance, marketing automation makes it possible to implement strong lead scoring rules, enabling separation of qualifying leads from the chaff, without manual work. Marketing automation, however, does not cater to notifications, and Workflow fills this void. Even when leads are qualified automatically, everyone, ranging from the front line sales executive to the CEO have to log in and see which lead qualifies. Setting a Workflow rule to send out notification email extends the automation chain.

Workflow Types

There are two basic types of workflows - Immediate and Time Dependent, available for any object supported by workflow.

1. Immediate Workflow

Immediate workflows trigger immediately when the workflow criteria is met, and the actions associated with the workflow, such as email alert, updating the field, or anything else, takes place immediately.

2. Time Dependent Workflow

Time dependent workflows trigger the actions associated with the workflow, be it email alert or updating a field, after any set period of time. The configuration of time-dependent actions may be done in the "time-dependent actions" sections of the object. Time dependent workflows support days and hours, and not minutes, and work on the organization's time zone.

Time based workflows are useful to set reminders or trigger some action automatically. For instance, it may be used to generate critical date reminders when a large opportunity is a week away from its close date. It is possible to create a time line of actions by configuring multiple time triggers and defining actions for each trigger.

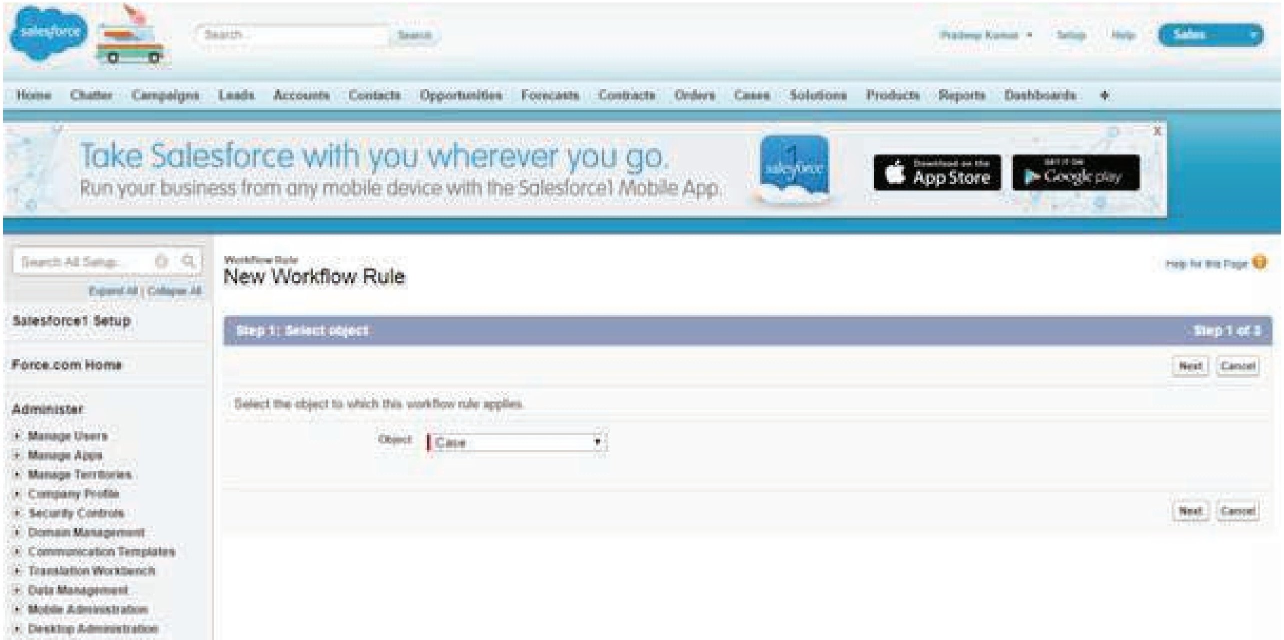
How to Create Workflow Rules?

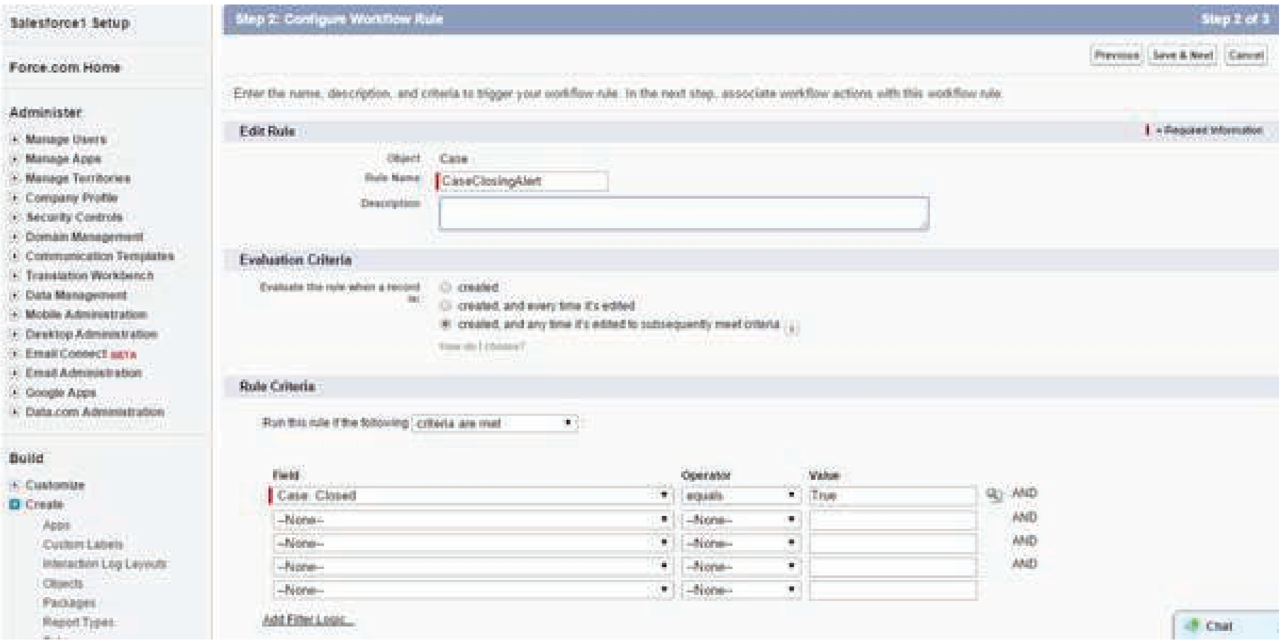
The two pre-requisites to create a workflow rule are:

1. The logic or criteria that has to be applied to the record, and cause that rule to run (e.g., if a new lead is added to the "qualified leads" database)
2. Action to execute when a record matches the criteria (e.g., send out an email notification). The actions possible are
   - New Task: Creating a new task when the record matches the criteria specified in the rule.
   - Field Update, which enables modifying the value of any particular field automatically.
   - New Email alert: This option, like all others, may be reached from the workflow action dropdown menu, but it is necessary to set up an email template in Salesforce beforehand.
   - New Outbound Message: Sending the specified information to a designated endpoint, such as an external service.
   - Select Existing Action, or use a Workforce action already created for other workflow rule.

Once there is clarity on these two pre-requisites, setting up a Workflow Rule is simple, straightforward, easy, and fast:

1. Navigated Setup, click Create > Workflow & Approvals > Settings, to set the default workflow user.
2. Navigate Setup > App Setup > Create > Workflow & Approvals > Workflow Rules > New Workflow Rule
3. Select the object to apply the Workflow rule. It is possible to select both native and custom objects. For example, select "Opportunity", and click "Next."
4. Assign a name for the rule and describe it. The description field is optional, but highly recommended to lend clarity to a third-person on what exactly the rule would achieve.
5. Set the "evaluation criteria," or when the required record is to be evaluated. There are three options: (1) to run the rule whenever a new record is created, (2) to run it whenever a record is created and every time it is edited, and (3) to run it only when a record is created or when the edited record matches the rule criteria for the first time. If, for instance, the intention is to send an email notification when a lead qualifies, it is best to select option 3, but if the intention is to send an email notification whenever any new lead is added to the pipeline, the best option is 1.
6. Define the Workflow Action, or the rule criteria. It is possible to use a formula and filter logic at this stage if required, with the rule set to fire if the formula evaluates to be true.
7. After setting up the rule, specify the workflow action that the rule will trigger. Assume the workflow rule is to send out a notification email to the CEO when a lead qualifies. Select Immediate Workflow Actions > New Email Alert and enter a description. Select the email template from the available pre-defined options. Next, select Recipient Type > Role > and select CEO. Click "Save" and "Done."
8. Activate the Workflow Rule. Select the name of the rule on the Workflow Rules landing page, and click on "Activate." It is possible to edit or delete the rule in the same way.





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Process

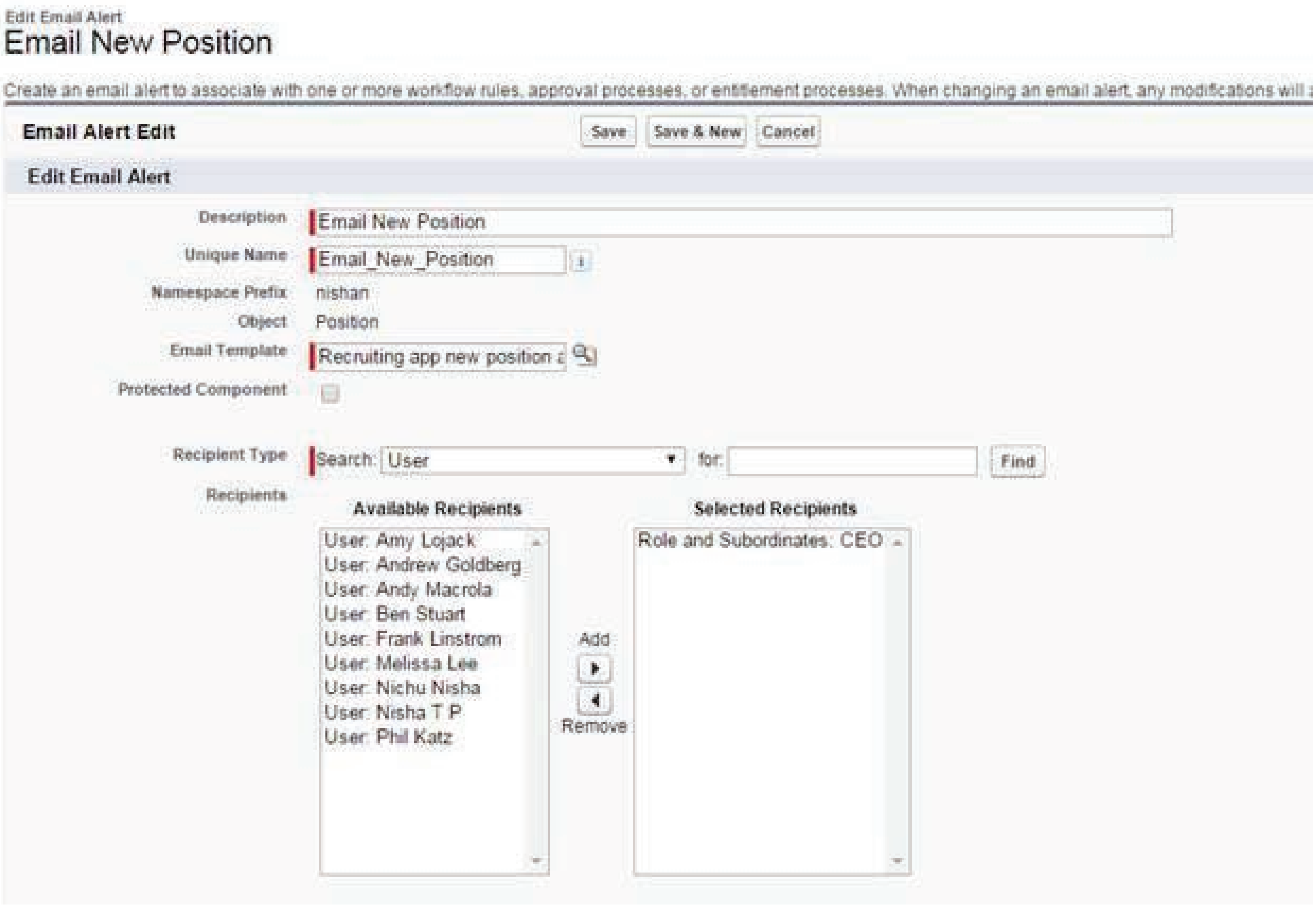
The key applications of Workflows are to create email alerts, define field updates, define outbound messages, and define flow triggers. Here are the processes for these applications:

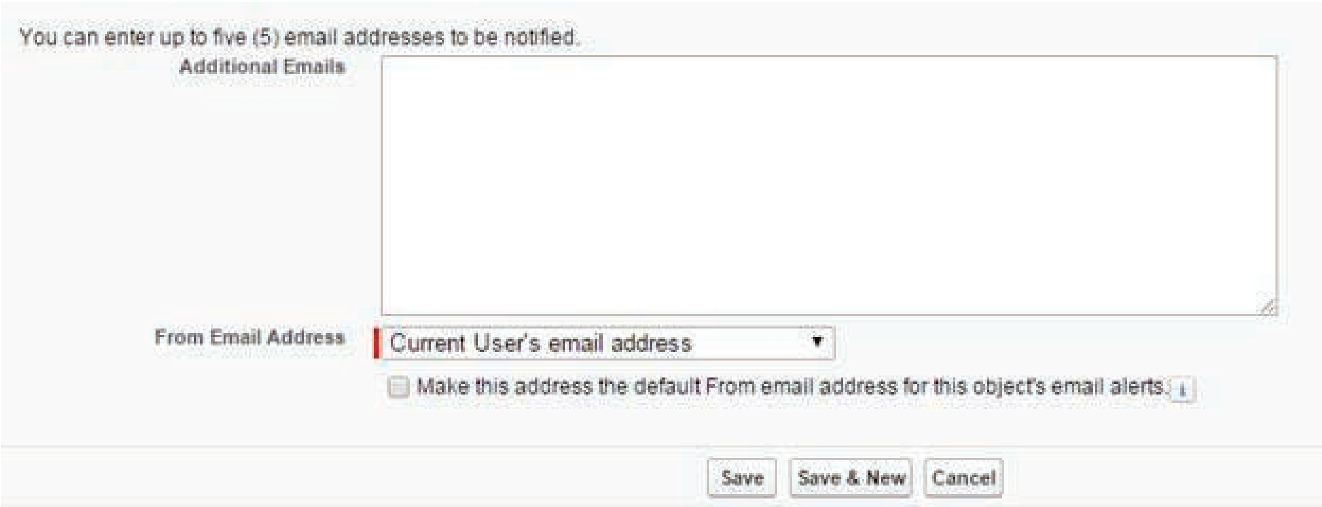
Creating Email Alerts

Email alerts send emails to one or more recipients, automatically.

1. Create email templates. It is a best practice to create a standardized letterhead to use for all email templates in use for workflow alerts.
2. Click Create > Workflow & Approvals > Email Alerts.
3. Add recipients outside Salesforce users, leads, or contacts.
4. Select the required template from all available ones
5. Insert a link to a case or opportunity using merge fields in email templates.

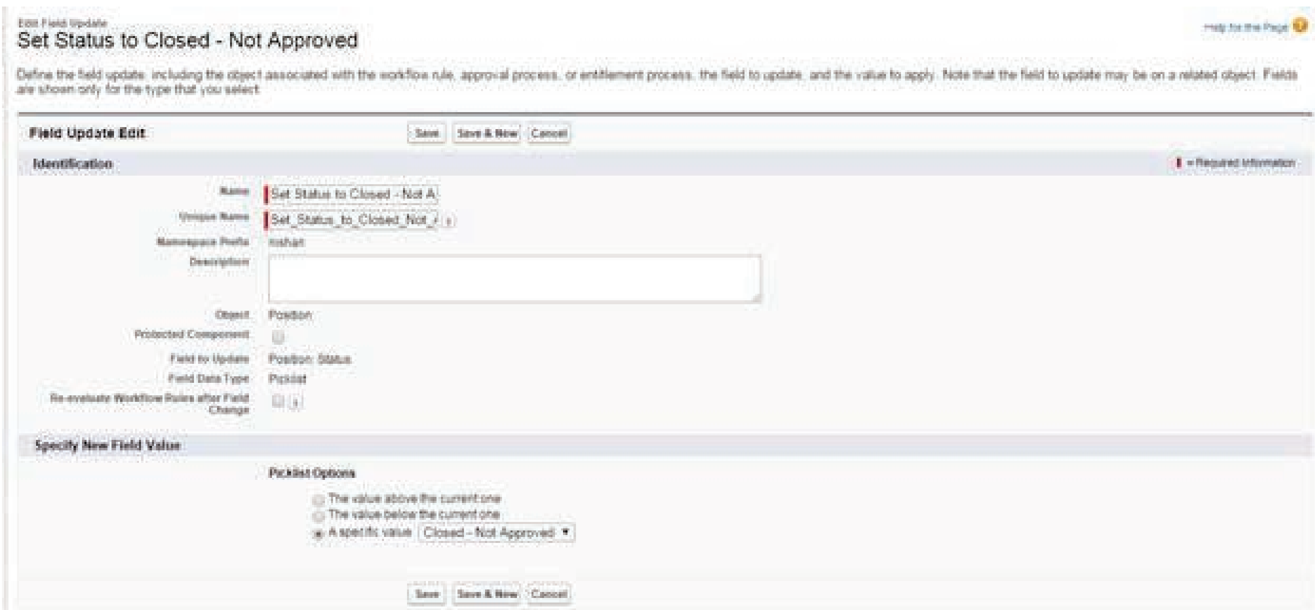
Workflow alerts that are set to shoot off email to a role occupied by more than one person will send an email to each person in that role.





Defining Field Updates
Field updates change the value of a field. For example, the workflow can be configured to change the "Owner" field automatically, on a contract three days before it expires.

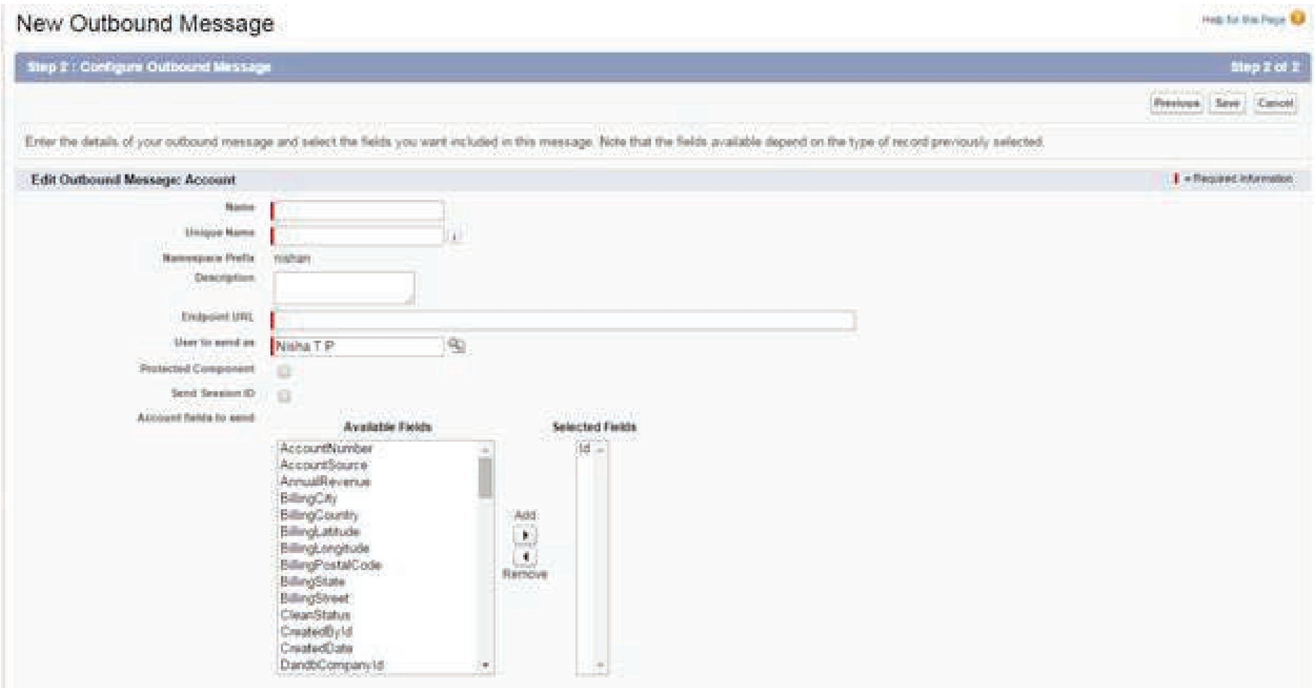
1. From Setup, click Create > Workflow & Approvals > Field Updates.
2. Create the required field updates for standard or custom objects. Avoid using unsupported checkbox or picklist field for formulas, and use the same operators and functions used for custom formula fields when the field update is based on a formula.
3. It is a best practice to avoid more than one field update with a rule or approval process that applies different values to the same field.



Defining Outbound Messages

Outbound messages send a secure configurable API message in XML format to a designated listener. It may, for instance, be used to initiate the reimbursement process for an approved expense by triggering an outbound API message to an external HR system.

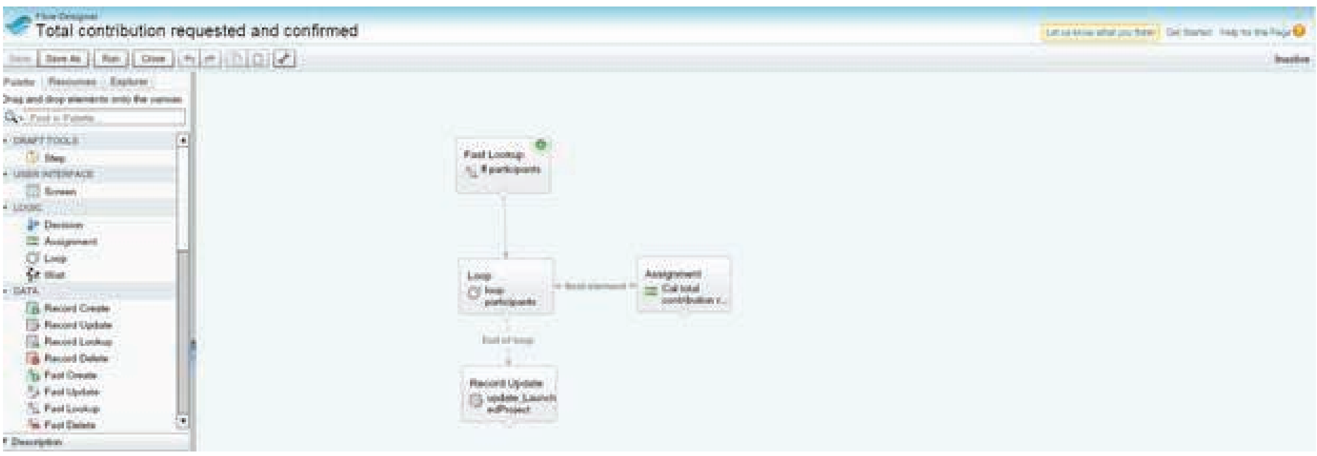
1. Navigate Setup > Create > Workflow & Approvals > Outbound Messages
2. Create the required outbound messages for standard or custom objects.
3. Determine the user to use when sending the outbound message.
4. It is a best practice to give the outbound message a description that tells other users to tell what it



Defining Flow Triggers

Flow triggers are available only for workflow rules and cannot be used as actions elsewhere. Only active, auto launched flows can be launched by flow triggers.

Navigate Setup > Create > Workflow & Approvals > Flow Triggers



Key Considerations

The entire process of creating a Workflow takes just a few minutes, and spares constant monitoring or repeated manual tasks. However, keep the following considerations in mind to reap the full benefits of Workflow.

- Each workflow rule applies to a single object. To manipulate multiple objects, a new Workflow is required for each object.
- Workflow Rules evaluate changes made to records offline only when the records are synchronized. This means a rule intended to be applied earlier may actually be applied together with other rules. Here, the hierarchy of processing becomes important. Creating rules without factoring in the hierarchy may lead to a different output than anticipated. Salesforce processes rules in the following order:

  1. Validation rules
  2. Assignment rules
  3. Auto-response rules
  4. Workflow rules (with immediate actions)
  5. Escalation rules.

- When multiple workflows are set, Salesforce does not guarantee the order of execution of individual actions and types of actions. However, field update actions are executed first, followed by other actions.
- Monitor pending time-dependent actions and cancel them if required from Setup > Monitoring > Time-Based Workflow

Finally, for all the possibilities Workflow enables, there are certain limitations as well. For instance, it is not possible to create email alerts for workflow rules on activities or combine workflow rules with time triggers. Then, even when Workforce rules are set and records match the set criteria, the rules do not trigger when certain other actions are met. For instance, workflow does not work when mass-updating address fields, mass updating divisions or mass replacing picklist values. Also, it cannot be triggered by campaign statistic fields, including individual campaign statistics and campaign hierarchy statistics.

All things considered, Workflow is a powerful tool that contributes in a big way to the popularity of Salesforce. However, as it is with any tool, realizing its potential requires using it in the right way and having a clear-cut idea of the end-objectives.

About Suyati

Suyatiprovides marketing technology and integration services for companies that wish to combine the best of breed solutions and create a unified approach to customer acquisition. This unified digital marketing approach requires system integration between various CMS and CRM platforms, and a slew of ecommerce, Marketing Automation, Social Media Listening, email and social marketing, and customer service systems. Our specialized knowledge in Salesforce, open source and .Net based systems enables us to build effective custom integrated solutions for our clients.

Suyati's custom technology solutions have been deployed in companies in the US, Western Europe and Australia, and have helped many enterprises leverage the web/cloud/mobile technologies to acquire customers through integrated digital marketing. Suyati is based in Chicago with product engineering capability out of the US and India.

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Reference:

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