EXAMPLES OF WORKFLOW RULES

Summary

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Follow Up Before a Contract Expires

Object	Contract
Description	Email a reminder to the renewal manager 20 days before a contract's end date.

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Evaluation Criteria	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 is met. `(Contract: Status equals Activated)`
Immediate Actions	None
Time-Dependent Actions	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.

Object	Case
Description	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.
Evaluation Criteria	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.
	`(Case: Priority equals High) and`
	`(Case: Closed equals True) and`
	`(Case: Contract Type equals Platinum)`

Immediate Actions	None
Time-Dependent Actions	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.

Object	Opportunity
Description	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.
Evaluation Criteria	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

Object	Shipment
Description	Update the `Shipment Status` field to Delayed if a shipment has exceeded the expected delivery date and hasn't reached the customer.
Evaluation Criteria	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 is met. `(Shipment: Status not equal to Delivered)`
Immediate Actions	None
Time-Dependent Actions	1 day after Shipment: Expected Delivery Date—`Field Update`: Change `Shipment Status` field to Delayed on Shipment record.

Automatically Activate New Users

Object	User
Description	Make sure that each new user is active so that the user can log in to Salesforce.
Evaluation Criteria	Evaluate the rule when a record is: created
Rule Criteria (Filter)	Run this rule if the following criteria is met. `(User: Active equals False)`
Immediate Actions	`Field Update`: Set `Active` to True.
Time-Dependent Actions	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.

Object	Case
Description	Notify sales VP about cases filed for top accounts.
Evaluation Criteria	Evaluate the rule when a record is: created
Rule Criteria (Filter)	Run this rule if the following criteria are met. `AND(Account.AnnualRevenue > 500000, Account.NumberOfEmployees > 5000)`
Immediate Actions	`Email Alert:` Notify VP about cases for large accounts.
Time-Dependent Actions	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.

Object	Opportunity
Description	Enforce opportunity naming convention.
Evaluation Criteria	Evaluate the rule when a record is: created, and every time it's edited
Rule Criteria (Filter)	Run this rule if the following criteria is met. `NOT(CONTAINS( Name, Account.Name ))`
Immediate Actions	`Field Update`: Set opportunity name to the following formula. `Account.Name & ": " & Name`
Time-Dependent Actions	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

Object	Case

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

Set Resolution Date for Standard Support

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

Set Resolution Date for Premium Support

Object	Case
Description	Set the case target resolution date for accounts that have premium support level to 5 days from today.
Evaluation Criteria	Evaluate the rule when a record is: created
Rule Criteria (Filter)	Run this rule if the following formula is true. `ISPICKVAL(Account.Support_Level__c , "Premium")`
Immediate Actions	`Field Update`: Set the `Target Resolution Date` to Today() + 5.
Time-Dependent Actions	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.

Object	Candidate
Description	Change the `Application Status` field to Closed for the custom Application object when the `Candidate Status` field for the custom Candidate object changes to Accepted.
Evaluation Criteria	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 is met. `(Candidate: Status equals Accepted)`
Immediate Actions	`Field Update:` Change the `Application Status` field to Closed on parent Application record.
Time-Dependent Actions	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.

Object	Opportunity
Description	Change the record type of closed-won opportunities.
Evaluation Criteria	Evaluate the rule when a record is: created, and every time it's edited

Rule Criteria (Filter)	Run this rule if the following criteria are met.
	`(Opportunity: Closed equals True) and`
	`(Opportunity: Stage equals Closed Won)`

Immediate Actions	`Field Update:` Set the record type to Closed Opportunities.
Time-Dependent Actions	None

Override the Default Opportunity Close Date

Object	Opportunity

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

Report Lost Opportunities

Object	Opportunity
Description	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.
Evaluation Criteria	Evaluate the rule when a record is: created, and every time it's edited
Rule Criteria (Filter)	Run this rule if the following formula is true. `AND( ISCHANGED(StageName), ISPICKVAL(PRIORVALUE(StageName) , "Proposal/Price Quote"), ISPICKVAL(StageName,"Closed Lost"), (Amount >1000000))`
Immediate Actions	`Email Alert:` Notify the VP of sales role that the deal was lost.
Time-Dependent Actions	None

Report Unassigned Leads

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

Object	Lead
Description	Ensure that unassigned leads are tracked in a timely manner by notifying the manager if a lead is not accepted in 2 days.
Evaluation Criteria	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 is met. `Lead Owner equals Unassigned Lead Queue`
Immediate Actions	None
Time-Dependent Actions	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%

Object	Quote Line Item
Description	Ensure that an email alert is sent if a sales rep applies a quote line item discount that exceeds 40%.
Evaluation Criteria	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 is met. `Quote Line Item: Discount is greater than 40`
Immediate Actions	`Email Alert:` Notify the manager role that the quote line item discount exceeds 40%.
Time-Dependent Actions	None

Notify Key People About Account Owner Changes

Object	Account
Description	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.
Evaluation Criteria	Evaluate the rule when a record is: created, and every time it's edited
Rule Criteria (Filter)	Run this rule if the following formula is true. `AND( ISCHANGED(OwnerId), AnnualRevenue > 1000000 )`
Immediate Actions	`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)))))
```

Object	Contact
Description	Send an email to the contact 2 days before the contact's birthday.
Evaluation Criteria	Evaluate the rule when a record is: created

Rule Criteria (Filter)	Run this rule if the following formula is true.
	`(Contact: Birthdate not equal to null) and`
	`(Contact: Email not equal to null)`

Immediate Actions	None
Time-Dependent Actions	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

Object	Opportunity
Description	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.
Evaluation Criteria	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 100000) and`
	`(Opportunity: Closed equals False)`

Immediate Actions	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

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