



## EXAMPLES OF WORKFLOW RULES

### Abstract

Provides examples of workflow rules for various types of apps that you can use and modify for your own purposes. Workflow automates email alerts, tasks, field updates, and outbound messages.

Use the following workflow rule examples to learn how you can implement common business objectives.

### Business Processes

- Follow Up when Platinum Contract Case Closes
- Assign Credit Check for New Customer
- Notify Account Owner About New, High-Priority Cases
- Update Shipment Status if Shipment is Delayed

### 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

### 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

## Business Processes

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### Follow Up when Platinum Contract Case Closes

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

<b>Object</b>	Case
<b>Description</b>	Send a feedback request in email to the case contact seven days after a high-priority case is closed if the customer has a platinum contract agreement.
<b>Evaluate the rule when a record is:</b>	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:  (Case: Priority equals High) and (Case: Closed equals True) and (Case: Contract Type equals Platinum)
<b>Immediate Actions</b>	None
<b>Time-Dependent Actions</b>	7 Days After Case: Date/Time Closed—Email Alert: Send a feedback request to the case contact.

### Assign Credit Check for New Customer

This example assumes there is a `New Customer` custom field 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>Evaluate the rule when a record is:</b>	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:  (Opportunity: Amount greater than 50000) and (Opportunity: Closed equals False) and (Opportunity: New Customer equals True)
<b>Immediate Actions</b>	None
<b>Time-Dependent Actions</b>	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 there is a Service Level Agreement custom picklist called SLA that identifies the agreement level on accounts and contains the value "Platinum."

<b>Object</b>	Case
<b>Description</b>	Notify the account owner when a high-priority case is created for accounts with a platinum service level agreement.

<b>Evaluate the rule when a record is:</b>	created
<b>Rule Criteria (Filter)</b>	Run this rule if the following criteria are met:  (Case: Priority equals High) and (Account: SLA equals Platinum)
<b>Immediate Actions</b>	Email Alert: Email the details of the high-priority case to the account owner.
<b>Time-Dependent Actions</b>	None.

### Update Shipment Status if Shipment is Delayed

<b>Object</b>	Shipment
<b>Description</b>	Update the Shipment Status field to “Delayed” if a shipment has exceeded the expected delivery date and not reached the customer.
<b>Evaluate the rule when a record is:</b>	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:  (Shipment: Status not equal to Delivered)
<b>Immediate Actions</b>	None.
<b>Time-Dependent Actions</b>	1 day after Shipment: Expected Delivery Date—Field Update: Change Shipment Status field to “Delayed” on Shipment record.

## Cross-Object Processes

### Notify Sales VP About Cases Filed for Top Accounts

Use the following workflow rule if your sales VP wants to know about any cases filed for top accounts, where top accounts are determined by size and revenue.

<b>Object</b>	Case
<b>Description</b>	Notify Sales VP about any cases filed for top accounts.
<b>Evaluate the rule when a record is:</b>	created

<b>Rule Criteria (Filter)</b>	Run this rule if the following criteria are met:  <pre>AND (Account.AnnualRevenue &gt; 500000, Account.NumberOfEmployees &gt; 5000)</pre>
<b>Immediate Actions</b>	Email Alert: Notify VP about cases for big 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 organization, create the following workflow rule.

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

### Set Target Resolution Date for Cases

This example illustrates how to automatically set 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—as well as a custom date field on cases called *Target Resolution Date*.

Use the following three workflow rule examples to automatically 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>	Sets the case target resolution date for accounts that have basic support level to 30 days from today.
<b>Evaluate the rule when a record is:</b>	created

<b>Rule Criteria (Filter)</b>	Run this rule if the following formula evaluates to true:  ISPICKVAL(Account.Support_Level__c , "Basic")
<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>	Sets the case target resolution date for accounts that have standard support level to 14 days from today.
<b>Evaluate the rule when a record is:</b>	created
<b>Rule Criteria (Filter)</b>	Run this rule if the following formula evaluates to true:  ISPICKVAL(Account.Support_Level__c , "Standard")
<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>	Sets the case target resolution date for accounts that have premium support level to 5 days from today.
<b>Evaluate the rule when a record is:</b>	created
<b>Rule Criteria (Filter)</b>	Run this rule if the following formula evaluates to true:  ISPICKVAL(Account.Support_Level__c , "Premium")
<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

Use the following workflow rule if you want to close the Application record when a Candidate accepts a 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>	Changes the Application Status to “Closed” for the custom Application object when the Candidate Status for the custom Candidate object changes to “Accepted.”
<b>Evaluate the rule when a record is:</b>	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:  (Candidate: Status equals Accepted)
<b>Immediate Actions</b>	Field Update: Change Application Status field to “Closed” on parent Application record.
<b>Time-Dependent Actions</b>	None.

## Deal Management

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### Track Closed Opportunities

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



**Note:** For information on record types, see “Managing Record Types” in the online help.

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

### Override Default Opportunity Close Date

<b>Object</b>	Opportunity
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<b>Description</b>	Override the default close date from the close of the quarter to six months after the opportunity is created.
<b>Evaluate the rule when a record is:</b>	created
<b>Rule Criteria (Filter)</b>	Run this rule if the following criteria are met:  (Opportunity: Closed equals False)
<b>Immediate Actions</b>	<b>Field Update:</b> Use the following formula to set the opportunity close date to six months after the creation date:  DATE( YEAR(TODAY()) , (MONTH(TODAY()) + 6) , DAY(TODAY()) )
<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 \$1,000,000.
<b>Evaluate the rule when a record is:</b>	created, and every time it's edited
<b>Rule Criteria (Filter)</b>	Run this rule if the following formula evaluates to true:  AND( ISCHANGED(StageName) , ISPICKVAL(PRIORVALUE(StageName) , "Proposal/Price Quote") , ISPICKVAL(StageName,"Closed Lost") , (Amount >1000000) )
<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 two days.
<b>Evaluate the rule when a record is:</b>	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:  Lead Owner equals Unassigned Lead Queue
<b>Immediate Actions</b>	None.
<b>Time-Dependent Actions</b>	2 Days After Lead: Last Modified Date—Email Alert: Notify the manager role that there are unassigned leads in the queue that are older than two 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>Evaluate the rule when a record is:</b>	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:  Quote Line Item: Discount is greater than 40
<b>Immediate Actions</b>	Email Alert: Notify the manager role that the quote line item discount exceeds 40%.
<b>Time-Dependent Actions</b>	None.

## Notifications

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### 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 \$1,000,000.
<b>Evaluate the rule when a record is:</b>	created, and every time it's edited
<b>Rule Criteria (Filter)</b>	Run this rule if the following formula evaluates to true:  AND( ISCHANGED(OwnerId), AnnualRevenue > 1000000 )
<b>Immediate Actions</b>	Email Alert: Notify the person in the sales operations role of the change in account ownership.



<b>Time-Dependent Actions</b>	None.
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### Set Reminder for Contact Birthday

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

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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 two days before the contact's birthday.
<b>Evaluate the rule when a record is:</b>	created
<b>Rule Criteria (Filter)</b>	Run this rule if the following formula evaluates to true:  (Contact: Birthdate not equal to null) and (Contact: Email not equal to null)
<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 a large deal, an opportunity that has an amount greater than \$10,000. Also, create a follow-up task for the opportunity owner if the deal is still open when the close date passes.
<b>Evaluate the rule when a record is:</b>	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:  (Opportunity: Amount greater than 100000) and (Opportunity: Closed equals False)
<b>Immediate Actions</b>	None.
<b>Time-Dependent Actions</b>	<ul style="list-style-type: none"> <li>30 Days Before Opportunity: Close Date—Email Alert: Notify the opportunity owner that 30 days remain.</li> </ul>

- 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 \$1,000,000.
<b>Evaluate the rule when a record is:</b>	created, and every time it's edited
<b>Rule Criteria (Filter)</b>	Run this rule if the following formula evaluates to true:  <pre>AND( (LastModifiedById &lt;&gt; CreatedById), (AnnualRevenue &gt; 1000000) )</pre>
<b>Immediate Actions</b>	Email Alert: Notify the account owner that someone else has updated the account.
<b>Time-Dependent Actions</b>	None.