



## Getting Started with Salesforce CRM

### Email and Workflow Rule Administration

#### Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for Salesforce. This document focuses on Emails, Workflow and Filed Update administration. [Join our professional training program and learn from experts.](#)

#### History:

Version Date	Description Change	Author	Publish
0.1	Initial Draft	Chandra Prakash Sharma	10 <sup>th</sup> Jan 2013
0.1	Review#1	Amit Sharma	10 <sup>th</sup> Jan 2013

## Contents

Contents.....	2
.....	2
Manage email administration.....	3
Deliverability.....	3
Organization-Wide Email Addresses.....	4
Compliance BCC Email.....	5
Test Deliverability .....	5
Email to Salesforce.....	6
Delete Attachments Sent as Links.....	6
Email Footers .....	7
Set Up Workflow Rules.....	8
Workflows Rules.....	8
Approval Processes.....	13
How to Launch the Approval Process Wizard.....	13
Deference Between Jump Start Wizard and Standard Approval Process Wizard ...	14
1. Initial Submission Actions : Click on Add New button. It opens in dropdown of four options .....	17
Task, Email Alert, field Update, Outbound Message. select any one option. (Ex : Field Update).....	17
.....	17
4. Final Rejection Actions : .....	18
Email Alerts.....	24
Email Alerts .....	24
To Get Started Using Email Alerts .....	24
Workflow Daily Email Limit.....	26
Tasks.....	26
Field Updates.....	27
Outbound Messages.....	28
Settings.....	30
Leads.....	31
Web-to-Lead Setup.....	34
How To Go Web-to-Lead Setup : .....	34
.....	35
.....	35
.....	36
.....	36
Cases .....	36

# Manage email administration

## Deliverability

Improve the deliverability of email you send from Salesforce, configure your organization's email deliverability settings.

### Bounced email :

If you send Email and that is addressed to an invalid recipient, it is returned to the sender. If a sender sends several email messages that bounce, the email server might slow or block the delivery of all email from that sender.

### Configure the email deliverability settings for your organization :

**Setup > Administration > Email Administration > Deliverability**

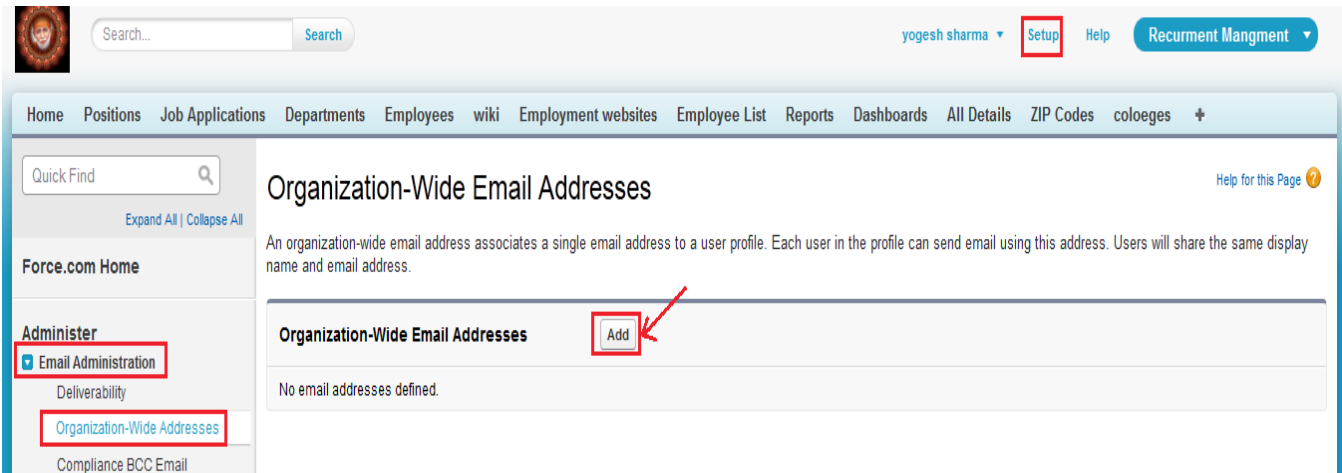
you can see below. set all the settings and click on Save button.

The screenshot displays the Salesforce Deliverability configuration page. The left sidebar contains a navigation menu with 'Administer' highlighted, and 'Deliverability' selected under 'Email Administration'. The main content area is titled 'Deliverability' and includes a 'Save' button at the top right. Below this, several sections are visible: 'Access to Send Email' with an 'Access level' dropdown set to 'All email'; 'Bounce Administration' with checkboxes for 'Activate bounce management', 'Show bounce alert next to all instances of the email address', and 'Return bounced emails to sender'; 'Email Security Compliance' with checkboxes for 'Enable compliance with standard email security mechanisms' and 'Enable Sender ID compliance'; 'Mass Email' with a checked checkbox for 'Notify sender when mass email completes'; and 'Transport Layer Security (TLS)' with a 'TLS Setting' dropdown set to 'Preferred' and a 'Restrict TLS to these domains' checkbox.

## Organization-Wide Email Addresses

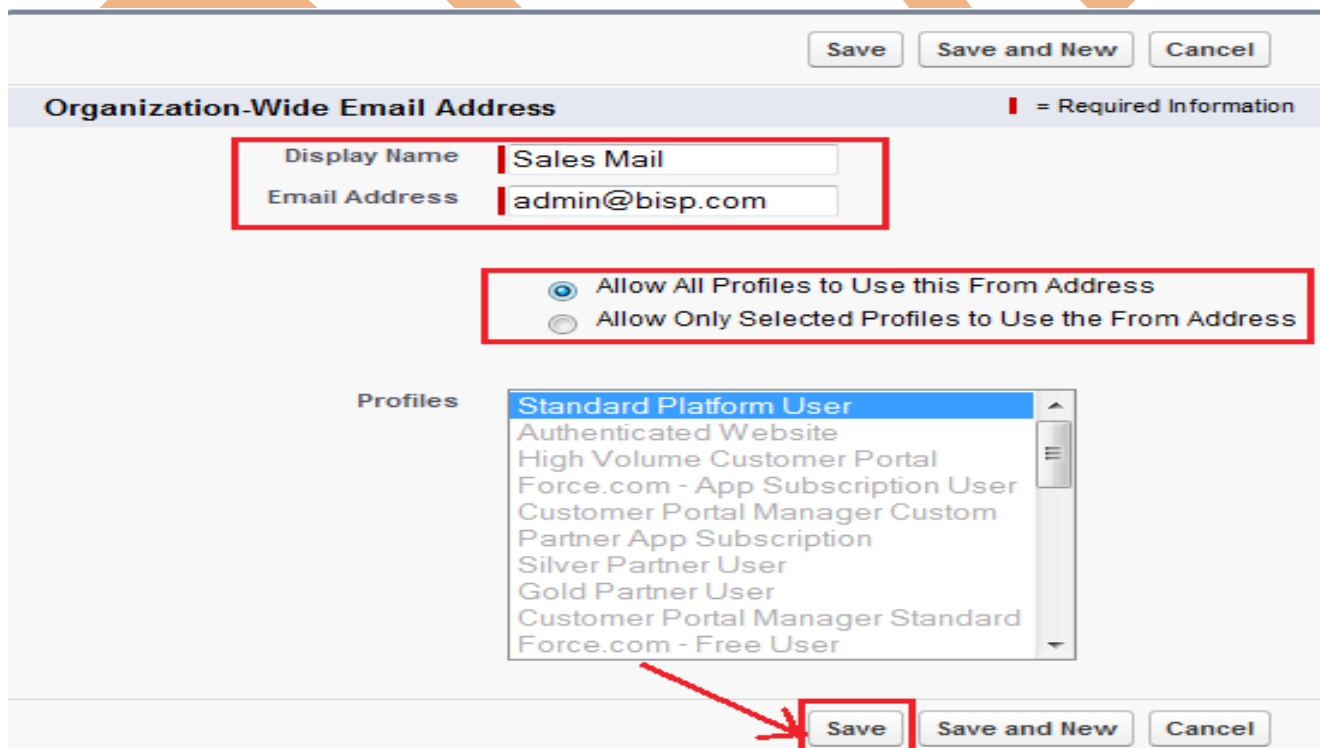
An organization-wide email address associates to a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address.

**Setup > Administration > Email Addresses > Organization-Wide Addresses**, click on Add button . you can see below.



The screenshot shows the Force.com Administration console. The user is logged in as 'yogesh sharma'. The navigation menu includes Home, Positions, Job Applications, Departments, Employees, wiki, Employment websites, Employee List, Reports, Dashboards, All Details, ZIP Codes, and coloeges. The main content area is titled 'Organization-Wide Email Addresses' and contains a description: 'An organization-wide email address associates a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address.' Below the description is a table with one row: 'Organization-Wide Email Addresses' and an 'Add' button. The 'Add' button is highlighted with a red box and an arrow. The left sidebar shows the 'Administer' menu with 'Email Administration' and 'Organization-Wide Addresses' highlighted.

After that click on Add button a new page opens on this page, fill Display Name, Email Address and select User Profiles and click on Save button.



The screenshot shows the 'Organization-Wide Email Address' form. The form has three main sections: 1. Fields for 'Display Name' (Sales Mail) and 'Email Address' (admin@bisp.com), both highlighted with red boxes. 2. Radio buttons for 'Allow All Profiles to Use this From Address' (selected) and 'Allow Only Selected Profiles to Use the From Address'. 3. A 'Profiles' dropdown menu showing a list of user profiles: Standard Platform User, Authenticated Website, High Volume Customer Portal, Force.com - App Subscription User, Customer Portal Manager Custom, Partner App Subscription, Silver Partner User, Gold Partner User, Customer Portal Manager Standard, and Force.com - Free User. The 'Save' button at the bottom is highlighted with a red box and an arrow.

## Compliance BCC Email

Set up a compliance BCC email to automatically copy each outgoing email to a compliance email address. Check enable, enter the compliance BCC email address for your organization, and click Save.

**Setup > Administration > Email Addresses > Compliance BCC Email**, click on this link then write email address given in text box. Check the check box and after that click on **Save** button.

## Compliance BCC Email

Set up a compliance BCC email to automatically copy each outgoing email to a compliance email address. Check enable, enter the compliance BCC email address for your organization, and click Save.

Compliance BCC Email I = Required Information

Enable

Compliance BCC Email

## Test Deliverability

Salesforce.com sends email from 52 IP addresses. If your organization blocks any of these IP addresses, users might not receive all email sent from salesforce.com. To verify your organization can receive email from each IP address:

- Enter your business email address below.
- Click Send. Salesforce.com simultaneously sends a test email from all 52 IP addresses to the email address you entered.
- Check the email account to make sure all 52 test emails are received.
- If less than 52 test emails were received, contact your email administrator.

**Setup > Administration > Email Addresses > Test deliverability**, Write Email address on text box and click on Send button.

Test Email Deliverability I = Required Information

Email Address

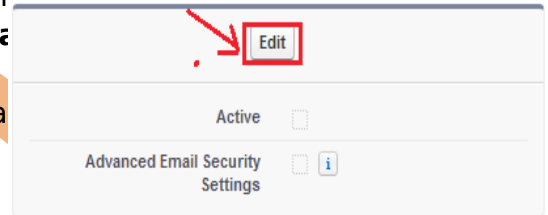
## Email to Salesforce

Email to Salesforce allows you to automatically log emails you send from third-party email accounts as activities on lead and contact records in salesforce.com.

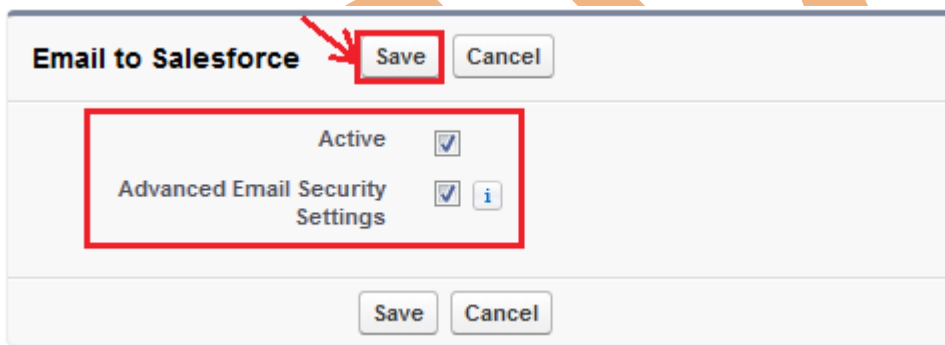
After Email to Salesforce is activated, users can access the My Email to Salesforce page to view their unique Email to Salesforce address and customize their settings.

**Setup > Administration > Email Addresses > Email to Salesforce**

In this page Click on Edit button, checked Active or Advanced settings then click on **Save** button.



A screenshot of the 'Edit' button in the Email to Salesforce settings. The button is highlighted with a red box and a red arrow pointing to it. Below the button, there are two checkboxes: 'Active' (unchecked) and 'Advanced Email Security Settings' (checked with an information icon).



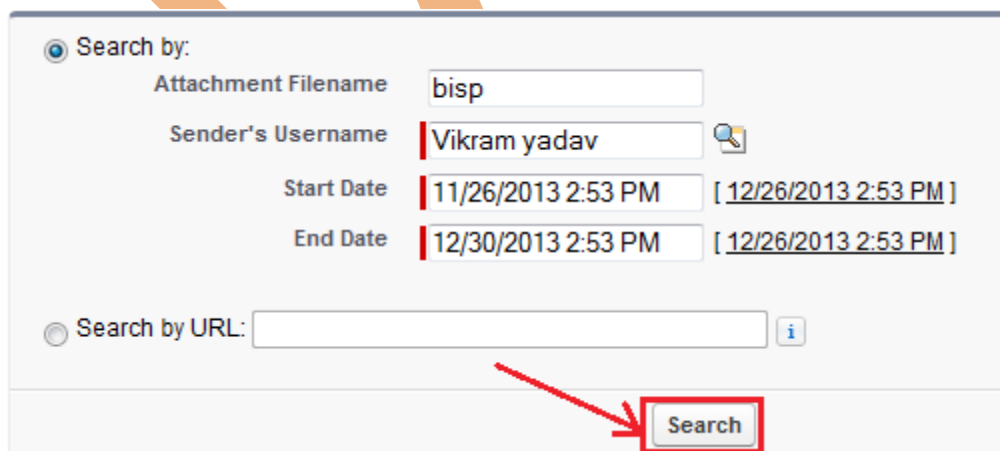
A screenshot of the 'Save' button in the Email to Salesforce settings. The button is highlighted with a red box and a red arrow pointing to it. Below the button, there are two checkboxes: 'Active' (checked) and 'Advanced Email Security Settings' (checked with an information icon).

## Delete Attachments Sent as Links

Need to stop email recipients downloading attachments sent, for example, using mass email?

Find and delete email attachments sent as links:

**Setup > Administration > Email Addresses > Delete Attachments Sent as Links,**

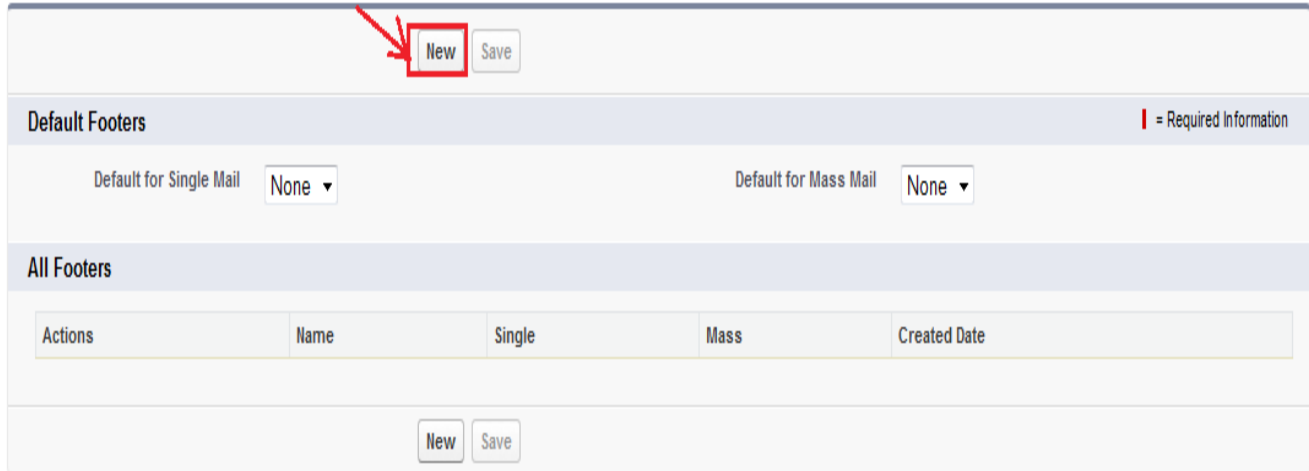


A screenshot of the 'Delete Attachments Sent as Links' search form. The form has two search options: 'Search by:' and 'Search by URL:'. The 'Search by:' option is selected. The search criteria are: Attachment Filename (bisp), Sender's Username (Vikram yadav), Start Date (11/26/2013 2:53 PM), and End Date (12/30/2013 2:53 PM). The 'Search' button is highlighted with a red box and a red arrow pointing to it.

## Email Footers

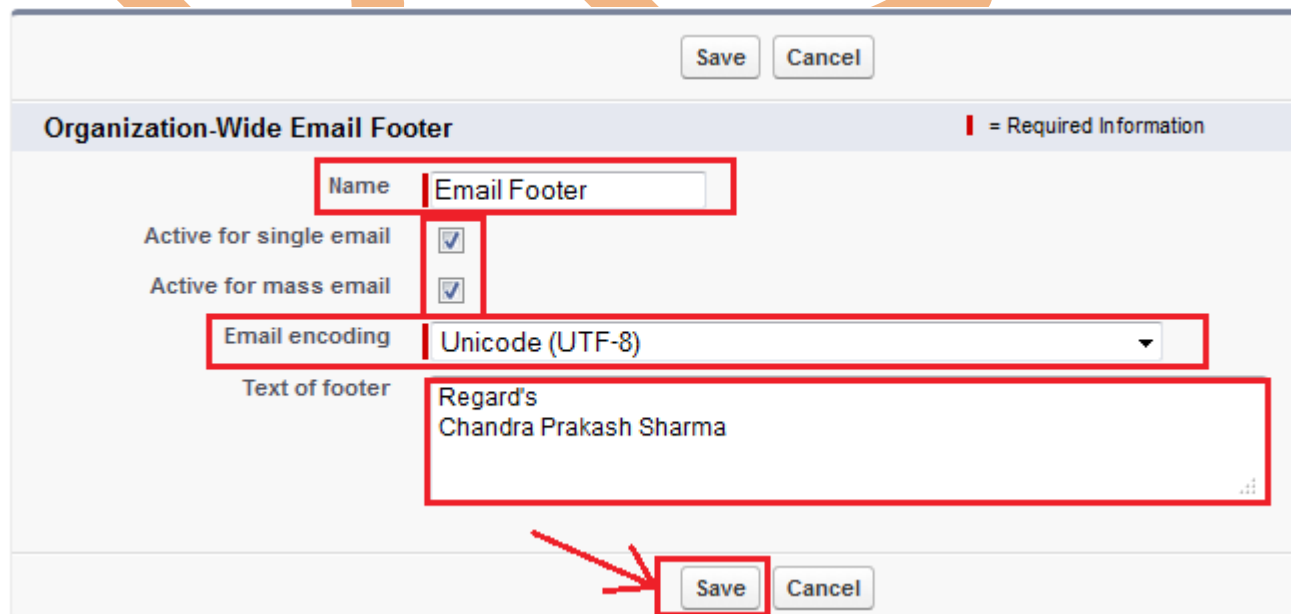
Add footers to emails sent from Salesforce.com. Create default footers—one for single emails and one for mass emails—or create one for each character encoding (General US & Western Europe, Korean, etc). Default footers are used if no footers match the outgoing email's character encoding.

**Setup > Administration > Email Addresses > Email Footers**, Click on New



The screenshot shows the Salesforce 'Email Footers' configuration page. At the top right, there are 'New' and 'Save' buttons. The 'New' button is highlighted with a red box and a red arrow. Below this is the 'Default Footers' section, which includes dropdown menus for 'Default for Single Mail' and 'Default for Mass Mail', both currently set to 'None'. A legend indicates that a red vertical bar next to a field name signifies 'Required Information'. Below the default footers is the 'All Footers' section, which contains a table with columns for 'Actions', 'Name', 'Single', 'Mass', and 'Created Date'. At the bottom of the 'All Footers' section, there are 'New' and 'Save' buttons.

After Click on New button. Open new web page on this page, fill all mandatory fields then click on **Save** button.



The screenshot shows the 'Organization-Wide Email Footer' form. At the top right, there are 'Save' and 'Cancel' buttons. The form contains several fields: 'Name' (Email Footer), 'Active for single email' (checked), 'Active for mass email' (checked), 'Email encoding' (Unicode (UTF-8)), and 'Text of footer' (Regard's Chandra Prakash Sharma). A legend indicates that a red vertical bar next to a field name signifies 'Required Information'. At the bottom right, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box and a red arrow.

# Set Up Workflow Rules

In salesForce.com Workflow assigns a new task to a user, role, or record owner. Example, automatically assigns follow-up tasks to a support representative one week after a case is updated.

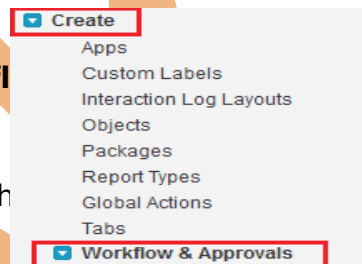
- **Assigning of task** : Assign a new task to a user, role, or record owner.
- **Sending email alerts** : Send an email to one or more recipients you specify.
- **Field updates** : Update the value of a field on a record.
- **Outbound message** : Send a secure, configurable API message (in XML format) to a designated listener.

## Workflows Rules

Setup > Create > Workflows & approvals > Workfl

### step 1 :

Click on Workflows Rules link then open new page, on th can see about the workflow Rules.



### Understanding Workflow

[Help for this Page](#)

Many of the tasks you normally assign, the emails you regularly send, and other record updates are part of your organization's standard processes. Instead of doing this work manually, you can configure workflow to do it automatically.

#### What is Workflow?

Workflow automates the following types of actions based on your organization's processes:

- :: Tasks—Assign a new task to a user, role, or record owner.
- :: Email Alerts—Send an email to one or more recipients you specify.
- :: Field Updates—Update the value of a field on a record.
- :: Outbound Messages—Send a secure, configurable API message (in XML format) to a designated listener.

For example, workflow can:

- :: Assign follow-up tasks to a support rep one week after a case is updated.
- :: Send sales management an email alert when a sales rep qualifies a large deal.
- :: Change the Owner field on a contract three days before it expires.
- :: Trigger an outbound API message to an external HR system to initiate the reimbursement process for an approved expense report.

Each workflow rule consists of:

- :: Criteria that cause the workflow rule to run.
- :: Immediate actions that execute when a record matches the criteria. For example, salesforce.com can automatically send an email that notifies the account team when a new high-value opportunity is created.
- :: Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, salesforce.com can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

Don't show me this page again

[Continue](#)



On this page two options- One for Create New View link . click on this link and you can create new specific view for your organization. Second option is New Rule button. Click on New Rules button.

View: All Workflow Rules Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Rule Name ↑	Description	Object	Active
No records to display.			

New Rule

### Step 3 :

Select any Custom object, click on Object Dropdown list, then click on **Next** button.

Step 1: Select objectStep 1 of 3

Next Cancel

Select the object to which this workflow rule applies.

Object Job Application ← Click here for selecting Custom Object.

Next Cancel

### Step 4 :

Step 2: Configure Workflow RuleStep 2 of 3

Previous Save & Next Cancel

Enter the name, description, and criteria to trigger your workflow rule. In the next step, associate workflow actions with this workflow rule.

**Edit Rule** ! = Required Information

Object Job Application

Rule Name Schedule Interview

Description Schedule Interview

**Evaluation Criteria**

Evaluate the rule when a record is:

- created
- created, and every time it's edited
- created, and any time it's edited to subsequently meet criteria ? For information click here..

← Select any one for your requirement

**Rule Criteria**

Run this rule if the following criteria are met In this drop down tow option available

1. Criteria are met.  
2. formula evaluate to true

Field	Operator	Value	
Job Application: Status	equals	Schedule Interview	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Note : You can Multiple option select at one time.

**Add Filter Logic...** Click here for add more field

Previous **Save & Next** Cancel

**Add Row Remove Row** Click here for remove field.

**Clear Filter Logic**

Filter Logic:

[Tips ?](#)

**Example:** If you wanted to filter to key deals for your company, where key deals are deals over \$1,000,000 that are closing in the next 45 days, or deals owned by a VP, you would set up your filters as follows

Field	Operator	Value
1. Amount	greater than	1000000
2. Closed Date	equals	NEXT 45 DAYS
3. Owner Role	starts with	VP
4. --None--	equ	

Advanced Filter Conditions:  
(1 AND 2) OR 3

Fill the Rule Name, select the Evaluate Criteria and then Select Run criteria in drop down option then if you select **Criteria are met** option then you select fields. If you select **Formula evaluate to true** in this option you write formula and click on **Save & Next** button.

### Step 5 :

**Step 3: Specify Workflow Actions** Step 3 of 3

**Done**

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria: Job Application: Status EQUALS Schedule Interview  
 Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

**Immediate Workflow Actions**

No workflow actions have been added.

**Add Workflow Action** Add Immediate workflow click here. 1

**Time-Dependent Workflow Actions** [See an example](#)

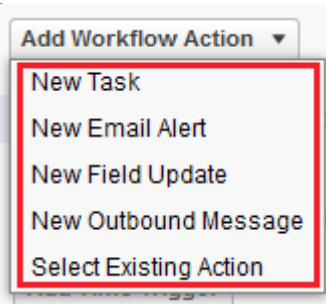
No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

**Add Time Trigger** Schedule time for add workflow click here 2

You can choose any one **Add workflow Action** OR **Add Time Trigger**

**1 .** If you click on Add workflow Action then Select any task in available list.

**Note :-** You can select multiple option.



**Configure Task**

Save Save & New Cancel

Create a task to associate with one or more workflow rules, approval processes, or entitlement processes. When changing a task, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

**Edit Task** ! = Required Information

Object	Job Application	Status	Not Started
Assigned To	Vikram yadav	Priority	Normal
Subject	Schedule Interview		
Unique Name	Schedule_Interview		
Due Date	Rule Trigger Date		
Notify Assignee	<input checked="" type="checkbox"/>		
Protected Component	<input type="checkbox"/>		

**Description Information**

Comments: Interview

Fill some fields, Assign To ,Subject, Unique Name, Due date (in due date you can choose option for date type), Status, Priority.

After then click on Save button .

After that you can see your task. You can **Edit** or **Remove** this task. Click on **Done** button for completing this steps.

**Step 3: Specify Workflow Actions** Step 3 of 3

**Done**

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria: Job Application: Status EQUALS Schedule Interview  
 Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

**Immediate Workflow Actions**

Action	Type	Description
<a href="#">Edit</a>   <a href="#">Remove</a>	Task	<a href="#">Schedule Interview</a>

Add Workflow Action ▾

**Time-Dependent Workflow Actions** [See an example](#)

*No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.*

Add Time Trigger

**Note :-** Workflows Rules are not activated by default, you have to activate them manually. Click on activate button for active rules. see below.

**Workflow Rule Detail** [Edit](#) [Delete](#) [Clone](#) **[Activate](#)**

Rule Name	schedule interview	Object	Job Application
Active	<input type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	Job Application: Status EQUALS Schedule Interview		
Created By	yoqesh sharma, 10/23/2013 11:51 AM	Modified By	yoqesh sharma, 10/23/2013 1:04 PM

After Active this workflow see below. Click to **Deactivate** button for deactivate workflow.

**Workflow Rule Detail** [Edit](#) [Clone](#) **[Deactivate](#)**

Rule Name	schedule interview	Object	Job Application
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	Job Application: Status EQUALS Schedule Interview		
Created By	yoqesh sharma, 10/23/2013 11:51 AM	Modified By	yoqesh sharma, 10/23/2013 1:05 PM

# Approval Processes

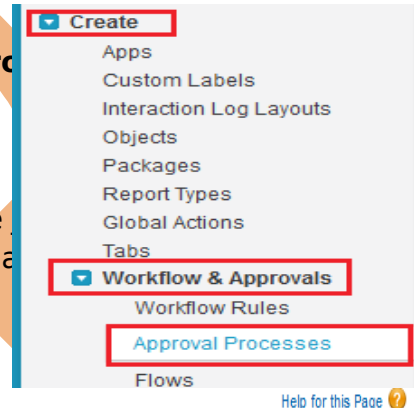
Another business logic engine of Salesforce is to automate approval process. Approvals take automation one step further, allowing you to specify a sequence of steps that are required to approve a record.

An approval process is an automated process your organization can use to approve records in Salesforce. An approval process specifies the steps necessary for a record to be approved and who must approve it at each step. A step can apply to all records included in the process, or just records that meet certain administrator-defined criteria. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval.

## How to Launch the Approval Process Wizard

**Setup > Create > Workflow & Approvals > Approval Processes**  
**Step 1:**

After Click on Approval process link then Choose the object for the new approval process. Click Create New Approval Process there are two options Use Jump Start Wizard and Use Standard Wizard. You can choose Use Standard Wizard from the drop-down button.



Approval Processes  
Job Application

[Help for this Page](#)

**i** Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. [Read the help topic](#)
2. [View the checklist](#)
3. [Create a custom user hierarchical relationship field](#)
4. [Create email templates](#)
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: **Job Application**

A listing of both active and inactive approval processes for **Job Applications** is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

**Create New Approval Process** ▼

- Use Jump Start Wizard ← **Click on Jump Start Wizard**
- Use Standard Setup Wizard

**Active Approval Processes** Reorder

No approval processes available

**Inactive Approval Processes**

No approval processes available

# Deference Between Jump Start Wizard and Standard Approval Process Wizard

Jump Start Wizard	Standard Approval Process Wizard
The jump start wizard is useful for simple approval processes with a single step	Standard Approval Process Wizard supports multiple approval steps or complex approval processes.
Many steps are skipped.	All the steps all included.
Use the jump start wizard if you want to create an approval process quickly by allowing Salesforce to automatically choose some default options for you	Use it when you want to fine tune the steps in your approval process

## Step 2: After click Jump Wizard :

Approval Process Jump Start Wizard  
Job Application

Help for this Page ?

**Approval Process Information** ! = Required Information

The Jump Start wizard creates a one-step approval process for you in just a few minutes.

Enter a name for your process in the box below and then select an email template to notify the approver (optional).

Name:

Unique Name:  ⓘ

Approval Assignment Email Template:

Add the Approval History related list to all Job Application page layouts:

Use Approver Field of Job Application Owner:

**Specify Entry Criteria**

Use this approval process if the following  :

Example:  evaluates to true when the person who last modified the record is not the record owner. [More Examples ...](#)

write in Formula field

Functions

-- All Function Categories --

- ABS
- AND
- BEGINS
- BLANKVALUE
- BR
- CASE

**Select Approver**

Using the options below, specify the user to whom the approval request should be assigned.

Let the submitter choose the approver manually.  
 Automatically assign an approver using a standard or custom hierarchy field:   
 Automatically assign to queue.   
 Automatically assign to approver(s).

Because this is the Jump Start Wizard, salesforce.com automatically chooses some settings for you. [Show More](#)

### Approval Process Information :

Enter a name for the new approval process.

Enter a unique name, which will be used to refer to this approval process in the Force.com API.

Enter Approval Assignment Email Template this field not mandatory.

### Specify Entry Criteria :

Select on in drop down menu approval process.

Criteria are .

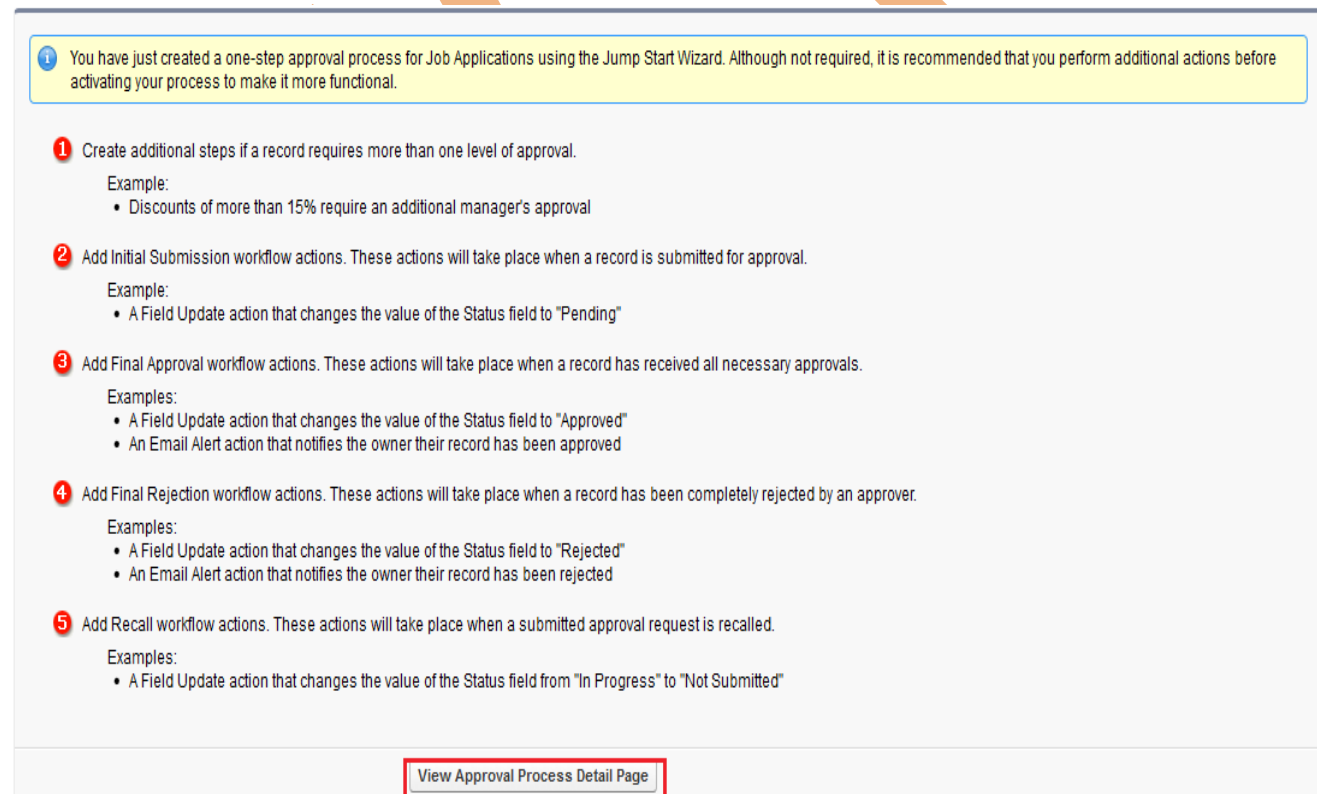
Formula evaluates to true.

### Select Approver :

Using the option select any one option (Ex : Automatically assign an approver using standard or custom hierarchy field).

After that click on **Save** button.

### Step 3:-



**i** You have just created a one-step approval process for Job Applications using the Jump Start Wizard. Although not required, it is recommended that you perform additional actions before activating your process to make it more functional.

- 1** Create additional steps if a record requires more than one level of approval.  
Example:
  - Discounts of more than 15% require an additional manager's approval
- 2** Add Initial Submission workflow actions. These actions will take place when a record is submitted for approval.  
Example:
  - A Field Update action that changes the value of the Status field to "Pending"
- 3** Add Final Approval workflow actions. These actions will take place when a record has received all necessary approvals.  
Examples:
  - A Field Update action that changes the value of the Status field to "Approved"
  - An Email Alert action that notifies the owner their record has been approved
- 4** Add Final Rejection workflow actions. These actions will take place when a record has been completely rejected by an approver.  
Examples:
  - A Field Update action that changes the value of the Status field to "Rejected"
  - An Email Alert action that notifies the owner their record has been rejected
- 5** Add Recall workflow actions. These actions will take place when a submitted approval request is recalled.  
Examples:
  - A Field Update action that changes the value of the Status field from "In Progress" to "Not Submitted"

[View Approval Process Detail Page](#)

Then click on **View Approval Process Detail Page** .

## Step 4 :

Approval Processes

[Help for this Page](#) 

# Job Application: Job Application

[« Back to Approval Process List](#)

5

### Process Definition Detail

[Edit](#) [Clone](#) [Delete](#) [Activate](#) [View Diagram](#)

Process Name	Job Application	Active	<input type="checkbox"/>
Unique Name	Job_Application	Next Automated Approver Determined By	Manager of Record Submitter
Description			
Entry Criteria	true		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Job Application Owner		
Created By	yogesh.sharma, 10/24/2013 12:18 PM	Modified By	yogesh.sharma, 10/24/2013 12:18 PM

### Initial Submission Actions

1

[Add Existing](#) [Add New](#)

Action	Type	Description
Record Lock		Lock the record from being edited

### Approval Steps

2

[New Approval Step](#)

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
<a href="#">Show Actions</a>   <a href="#">Edit</a>   <a href="#">Del</a>	1	Step 1			Manager	Final Rejection

### Final Approval Actions

3

[Add Existing](#) [Add New](#)

Action	Type	Description
<a href="#">Edit</a> Record Lock		Lock the record from being edited

### Final Rejection Actions

4

[Add Existing](#) [Add New](#)

Action	Type	Description
<a href="#">Edit</a> Record Lock		Unlock the record for editing

### Recall Actions

[Add Existing](#) [Add New](#)

Action	Type	Description
Record Lock		Unlock the record for editing



**1. Initial Submission Actions :** Click on Add New button. It opens in dropdown of four options Task, Email Alert, field Update, Outbound Message. select any one option. (Ex : Field Update).

Edit Field Update

[Help for this Page](#)

### Status on hold

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

**Field Update Edit**
Save Save & New Cancel

---

Identification ! = Required Information

Name

Unique Name  i

Description

Object Job Application

Field to Update

Field Data Type Picklist

Re-evaluate Workflow Rules after Field Change  i

**Specify New Field Value**

**Picklist Options**

The value above the current one

The value below the current one

A specific value

Save Save & New Cancel

Fill All Mandatory field's in Identification and select Specify New Value select in picklist option . Then click on **Save** button.

### 2. Approval Steps :

Approval Steps New Approval Step

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
<a href="#">Show Actions</a>   <a href="#">Edit</a>   <a href="#">Del</a>	1	Step 1			<u>Manager</u>	Final Rejection

You can give approval setting by using Approval Steps, there is who can approve. and also add multiple Approval candidate by click New Approval Step. (Ex: I will Assign Approver authority give on Manager.)

### 3. Final Approval Actions :

Action	Type	Description
Edit	Record Lock	Lock the record

Final Approval Actions- There are two buttons **Add Existing**, and **Add New** button click on **Add New** button, then click on **Field Update** in dropdown list.

**Identification** = Required Information

Name: Accepted Status  
Unique Name: Accepted\_status  
Description:   
Object: Job Application  
Field to Update: Status  
Field Data Type: Picklist  
Re-evaluate Workflow Rules after Field Change:

**Specify New Field Value**

Picklist Options

The value above the current one  
 The value below the current one  
 A specific value: Accepted

Save Save & New Cancel

Fill All Mandatory field's in Identification and select Specify New Value select in picklist option .  
Then click on **Save** button.

### 4. Final Rejection Actions :

follow previous step .

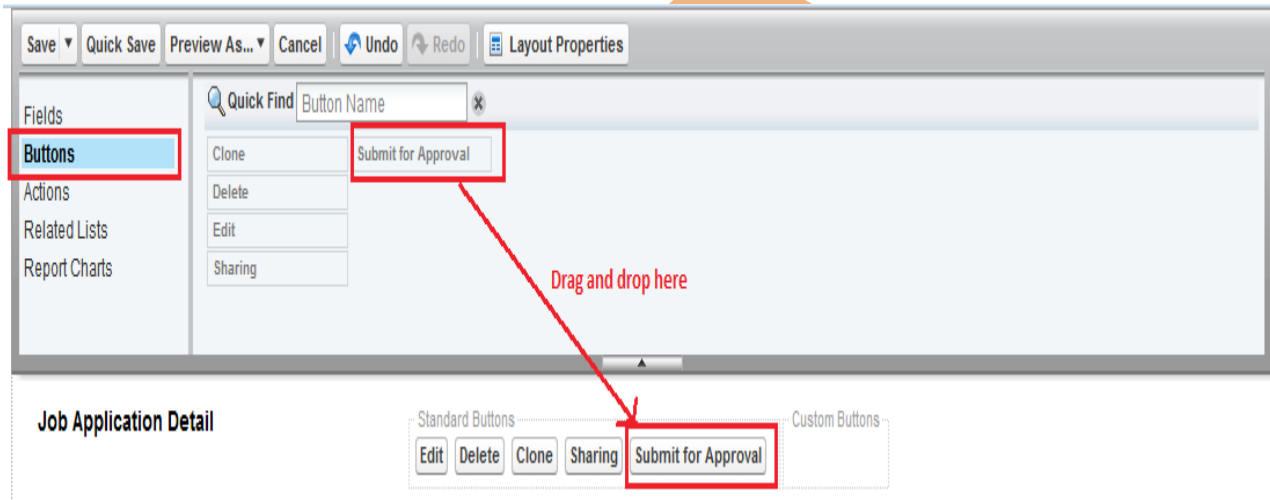
### 5. Click on Active Button :

Finish all steps and then click on Active button to active this Approval Process.

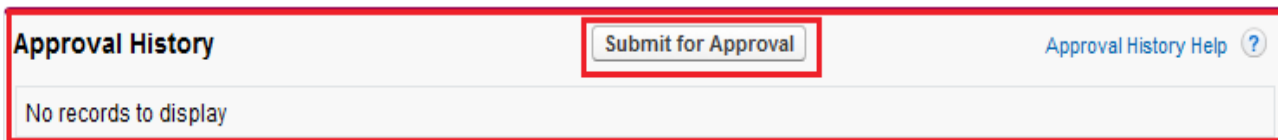
### Step 5 :

After that you need to set page layout in Custom object (Ex: Job applications)  
Click on Custom object(Job Applications) > Select any Field(Job application) > then click on **Edit Layout** link.

Click on **Button** link then **Submit for Approval** button you can drag and drop.



After that click on save button and then click on any job application field, after that scroll down and you can see Approval History. as below.  
and Click on **Submit For Approval** button for submit this Approval process.



After click Submit for Approval button Approval History looks like. see below.  
There you can see Overall Status is Pending.

The screenshot shows the 'Approval History' table. The table has columns for Action, Date, Status, Assigned To, Actual Approver, Comments, and Overall Status. The first row is highlighted in pink and shows 'Step: Step 1 (Pending for first approval)' with an overall status of 'Pending'. The second row shows 'Approval Request Submitted' with a status of 'Submitted'.

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1 (Pending for first approval)						Pending
<a href="#">Reassign</a>   <a href="#">Approve / Reject</a>	10/24/2013 2:20 PM	Pending	<a href="#">Vikram vadav</a>	<a href="#">Vikram vadav</a>		
Approval Request Submitted	10/24/2013 2:20 PM	Submitted	<a href="#">voqesh sharma</a>	<a href="#">voqesh sharma</a>		

### Step 6 :

This screen is Manager's screen. you can see below.

Click on **Approve/Reject** link to Manage approve or Reject this Process.

Action	Related To	Type	Most Recent Approver	Date Submitted
<a href="#">Reassign</a> <a href="#">Approve / Reject</a>	JD-009	Job Application	sharma.yogesh	10/24/2013 1:50 AM

After this if you want to Approve this process click on Approve button or click Reject button for Reject this process.

Approval Request Help for this Page ?

### Job Application: JD-009

[Back to Job Application: JD-009](#)

---

#### Approve/Reject Approval Request

Job Application # JD-009  
Owner [yogesh.sharma](#)

Comments

### Step 7 :

After approve process by Manager you can see your page's approve status will be changed, see below.

Then Overall Status is Approved.

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1						
	10/24/2013 2:37 PM	Approved	<a href="#">Vikram vadav</a>	<a href="#">yogesh sharma</a>	ok that it	<span style="color: green;">✔ Approved</span>
Approval Request Submitted						
	10/24/2013 2:20 PM	Submitted	<a href="#">yogesh sharma</a>	<a href="#">yogesh sharma</a>		

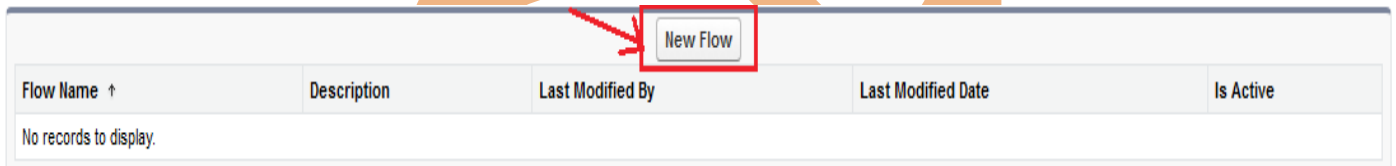
## Flows

In SalesForce.com Visual Workflow lets you easily build and manage flows, which guide users through screens that collect and display information, create and update Salesforce records, and execute logic based on user input.

Administrators design and build flows using the Flow Designer's simple drag-and-drop user interface, then activate, manage, and maintain them. Users can run an active flow from a custom button, tab, link, or the flow URL.

### How to Create Flows :

**Setup > Create > Workflow & Approvals > Flows**, Then click on New Flow, See below.



### Step 1 :

Flow Designer  
Unsaved Flow

Let us know what you think! Get Started Help for this Page ?

Save Save As Run Close

Palette Resources Explorer

Drag and drop elements onto the canvas

Find in Palette...

DRAFT TOOLS

- Step

USER INTERFACE

- Screen

LOGIC

- Decision
- Assignment

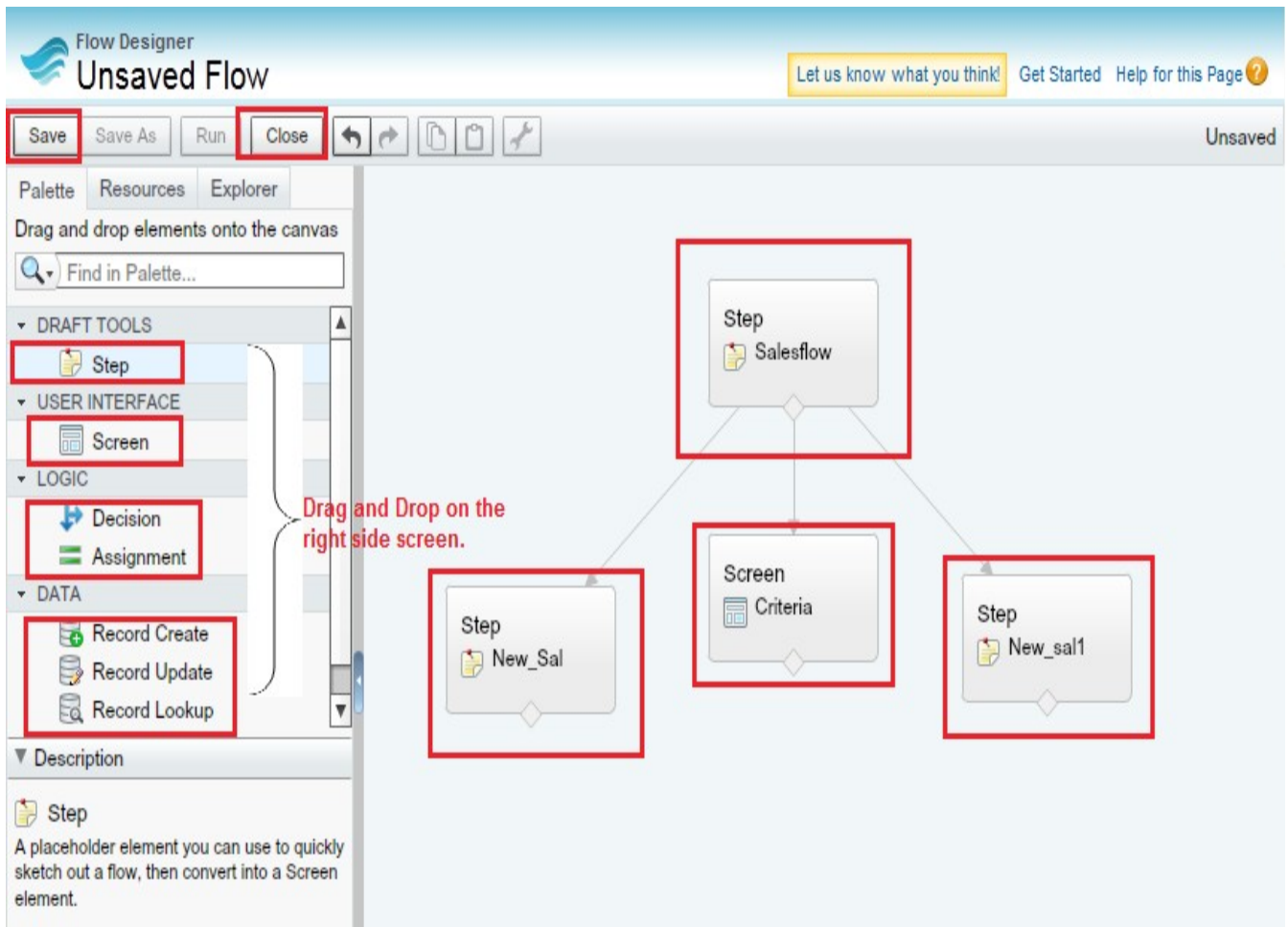
DATA

- Record Create
- Record Update
- Record Lookup

Description

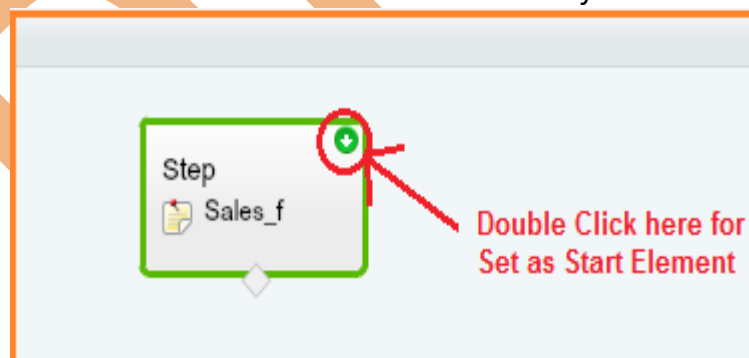
Step

A placeholder element you can use to quickly sketch out a flow, then convert into a Screen element.

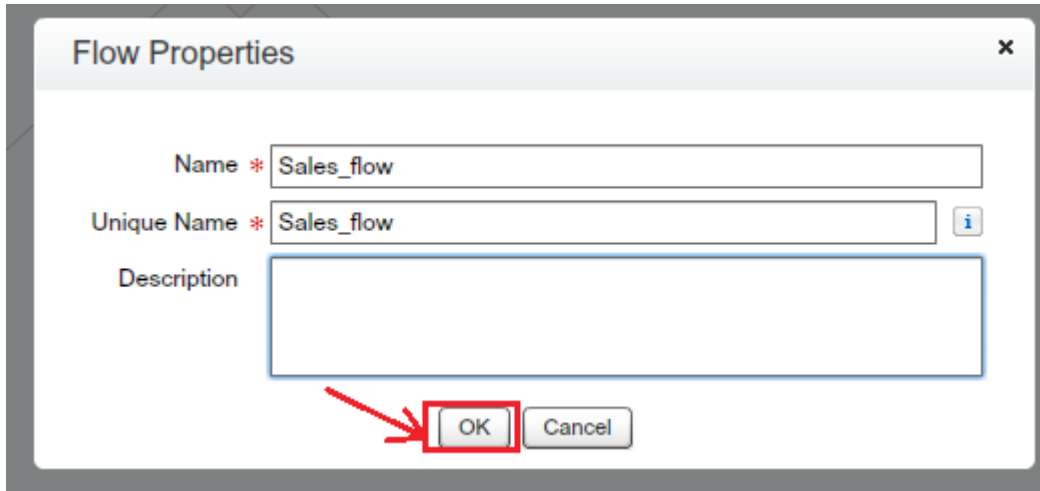


Drag and Drop on the right side screen.

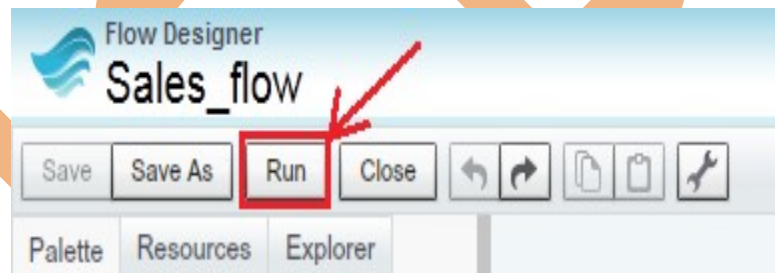
**Note :** Before you click on Run button makes sure to set start element. how to set start element, go to any drag and drop element and simply mouse hover on the element show click on green color icon for set as start element. you can see below.



Create flow after that. click on **Save** button, give flow name and click on **ok** button.



After that you can see Run button is Enable. Click on Run button for this flow.



Click on Run button, open new web page on this page you can see flow fields.

After save this flow you can Edit, delete ,Run and open this flow click on related action button. you can see below.

Flow **Sales\_flow** [Help for this Page](#)

[Back to List: Flows](#)

**Flow Detail** Edit Open Run Delete

Flow Name	Sales_flow	Unique Name	Sales_flow
Description		Namespace Prefix	
Active Version		URL	/flow/Sales_flow
Created By	yogesh sharma, 12/27/2013 10:02 AM	Activated/Deactivated By	
		Modified By	yogesh sharma, 12/27/2013 10:18 AM

**Flow Versions**

Action	Name	Version	Description	Created Date	Status
<span>Open   Run</span>	Sales_flow	1		12/27/2013 10:18 AM	Draft

## Email Alerts

## Email Alerts

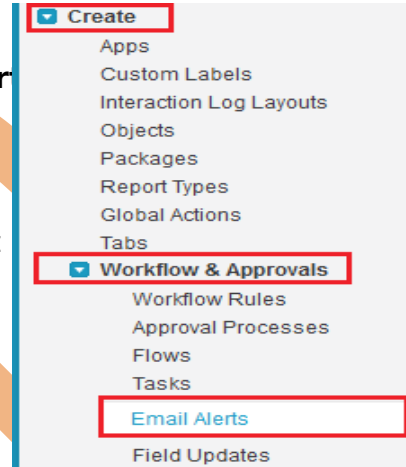
Email alerts are emails generated by a workflow rule or approval process and sent to designated recipients whenever specific business actions trigger the workflow rule or approval process. Must specify an email template for email alerts.

### To Get Started Using Email Alerts

**Step > Creates > Workflow & Approval > Email Alert**

#### From this page you can :

- Create a new email alert.
- Select an existing email alert to view details about cloned email alert, or view all the rules using it.
- Edit an existing email alert.
- Delete an email alert.



#### Step 1 :

Click on **New Template** button.

New Email Alert			
Description ↑	Email Template Name	Object	Last Modified Date
No records to display.			

#### Step 2 :



## Inform to all

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

**Email Alert Edit** Save Save & New Cancel

**Edit Email Alert** Required Information

Description **Inform to all**

Unique Name **Inform\_to\_all**

Object **Employee**

Email Template **Support Self-Service F**

Protected Component

Recipient Type Search: **User** for:  Find

Recipients

Available Recipients	Selected Recipients
User: yogesh sharma	User: Vikram yadav

Add Remove

You can enter up to five (5) email addresses to be notified.

Additional Emails

From Email Address **Current User's email address**

Make this address the default From email address for this object's email alerts.

Save Save & New Cancel

1. Enter a description.
2. Enter a unique name to refer to this component in the API.
3. choose the object for this email alert If available in dropdown.
4. Choose an email template.
5. Select Protected Component to mark the alert as protected if it is part of a Managed - Released package, If available.
6. Select who should receive this email alert. Depending on your organization settings and the object you selected, some options in this list may not be available.
7. Select the recipients who should receive this email alert in the Available Recipients list and click **Add**.
8. Enter up to five additional email addresses.

9. You can change the From Email Address, selecting in dropdown list.
10. Click **Save** button.

## Workflow Daily Email Limit

The daily limit for emails sent from workflow and approval-related email alerts is 1000 per standard Salesforce license per organization. The overall organization limit is 2000000. If the default workflow user isn't set, then the warning email is sent to an active system administrator.. When the daily limit is reached, a warning email goes out to the default workflow user.

## Tasks

Tasks are the templates that workflow rules use when automatically assigning tasks to users.

**Step > Creates > Workflow & Approval > task** , Click on **New Task** button.

### All Tasks

[Help for this Page](#) ?

Tasks are the templates that workflow rules use when automatically assigning tasks to users.

View: All Tasks [Create New View](#)

Action	Subject ↑	Due Date	Priority	Status	Assigned To	Notify Assignee	Type
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Schedule Interview</a>	Rule Trigger Date	Normal	Not Started	User : Vikram yadav	✓	Job Application
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Schedule Interview</a>	Rule Trigger Date	Normal	Not Started	User : Vikram yadav	✓	Employee
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">submit value</a>	Rule Trigger Date	High	In Progress	User : Vikram yadav	✓	Employee

**Step 1** : Select object name and click on **Next** button.

### New Task

[Help for this Page](#) ?

Step 1: Select object
Step 1 of 2

Next
Cancel

Select the object for this task and click Next. Tasks can only be associated with workflow rules and approval processes of the same type.

Object Job Posting

**Step 2 :** Fill Assign to, subject , due date, status, priority, checked Notify Assignee, protected component then click on **Save** button.

## New Task

[Help for this Page](#)

Step 2 : Configure Task
Step 2 of 2

Previous Save Cancel

Create a task to associate with one or more workflow rules, approval processes, or entitlement processes. When changing a task, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

**Edit Task** I = Required Information

Object	Job Posting	Status	In Progress
Assigned To	Vikram yadav	Priority	Normal
Subject	Schedule Interview		
Unique Name	Schedule_Interview		
Due Date	Job Posting: Created Date	plus	10 days
Notify Assignee	<input checked="" type="checkbox"/>		
Protected Component	<input checked="" type="checkbox"/>		

**Description Information**

Comments

After save, you can Edit, Delete , or clone this Task.

## Field Updates

Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.

**Step > Creates > Workflow & Approval > Field Updates, New Filed Update.**

### All Workflow Field Updates

[Help for this Page](#)

Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes.

View: All Workflow Field Updates [Edit](#) [Create New View](#)

Action	Name ↑	Field to Update	Operation	Value	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	Accepted Status	Job Application: Status	Value	Accpected	10/24/2013
<a href="#">Edit</a>   <a href="#">Del</a>	Status on hold	Job Application: Status	Value	New	10/24/2013

**Step 1 :** Fill all fields, select object name filed status and click on Save button. after saving this page you can Edit or Delete this page.

**Field Update Edit**

**Save** **Save & New** **Cancel**

**Identification** = Required Information

Name

Unique Name  i

Description

Object

Field to Update

Field Data Type

Re-evaluate Workflow Rules after Field Change  i

**Specify New Field Value**

**Picklist Options**

The value above the current one

The value below the current one

A specific value

**Save** **Save & New** **Cancel**

## Outbound Messages

Outbound Messages are SOAP transactions that salesforce.com automatically sends to external systems when triggered.

**Step > Creates > Workflow & Approval > Outbound Messages,** click on New Outbound Message.

# All Outbound Messages

[Help for this Page](#) ?

Outbound Messages are SOAP transactions that salesforce.com automatically sends to external systems when triggered.

View: All Outbound Messages [Edit](#) | [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

Action	Name ↑	Endpoint URL	Object	Last Modified Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">New Outbound Message</a>	<a href="http://bisps.com">http://bisps.com</a>	Employee	11/23/2013

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

**Step 1** : select Object name and click on **Next** button.

## New Outbound Message

[Help for this Page](#) ?

**Step 1: Select object** Step 1 of 2

Select the object that has the fields you want included in your message and click Next.

Object | Employee

**Step 2** : Fill all fields and click on **save** button.

Step 2 : Configure Outbound Message Step 2 of 2

Enter the details of your outbound message and select the fields you want included in this message. Note that the fields available depend on the type of record previously selected.

**Edit Outbound Message: Employee** ! = Required Information

Name

Unique Name  i

Description

Endpoint URL

User to send as  🔍

Protected Component

Send Session ID

Employee fields to send

Available Fields		Selected Fields
Candidate__c	Add <input type="button" value="▶"/> Remove <input type="button" value="◀"/>	Id
CreatedDate		CreatedById
Dob__c		Employee_Name__c
Email_Id__c		IsDeleted
First_Name__c		LastActivityDate
LastModifiedById		
LastModifiedDate		
LastReferencedDate		
LastViewedDate		
Min_Pay_Of_This_Position__c		
Mobile_Number__c		
Name		
OwnerId		
Position__c		

Chat

For checking View Message delivery Status click on **View Message delivery Status** button.

## Outbound Messaging Delivery Status Help for this Page ?

Total items in queue awaiting delivery : 0

**Next items for delivery**

Outbound Message ID	Object	# Attempts	Created Date	Next Attempt	Delivery Failure Reason
No records to display.					

**Oldest failures in queue**

Outbound Message ID	Object	# Attempts	Created Date	Next Attempt	Delivery Failure Reason
No records to display.					

## Settings

**Step > Creates > Workflow & Approval > Settings**, Set Default user and click on **Save** button.

Save Cancel

Specify a default workflow user. Salesforce.com recommends choosing a user with system administrator privileges.

Default Workflow User

Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comments in the second line.

Enable Email Approval Response

**⚠** By enabling the email approval response feature, you agree to allow salesforce.com to process email approval responses, update approval requests for all active users in your organization, and update the approval object on behalf of your organization's users.

Save Cancel

## Leads

SalesForce is a CRM software company, which allows its users to keep track of correspondence, data and sales for their business contacts in 1 place. Carefully managing **leads** before they convert into accounts, contacts and opportunities can result in a more streamlined selling process, with sales reps working more productively and efficiently.

### How To create Leads :

After login you can see some tab there is one tab is **Leads** click on this tab after then click on **New** button.

Home Chatter Campaigns **Leads** Accounts Contracts Opportunities Forecasts Contacts Cases Solutions Products Reports Dashboards +

Leads Home Tell me more! | Help for this Page ?

View: cp cs  [Edit](#) | [Create New View](#)

**Recent Leads**  Recently Viewed ▾

Name	Company	Phone
sharma, chandra prakash	cp soft	222222

## Step 1 :-

Lead Edit Help for this Page ?

**Lead Information** ! = Required Information

Lead Owner	yogesh sharma	Phone	<input type="text" value="2245871"/>
First Name	Mr. <input type="text" value="ricky"/>	Mobile	<input type="text"/>
Last Name	<input type="text" value="jonne"/>	Fax	<input type="text"/>
Company	<input type="text" value="Xyz"/>	Email	<input type="text" value="abc@abc.com"/>
Title	<input type="text" value="Cell phone"/>	Website	<input type="text" value="abc.com"/>
Lead Source	<input type="text" value="Web"/>	Lead Status	<input type="text" value="Working - Contacted"/>
Campaign	<input type="text" value="Nov Campaigns"/> <input type="button" value="🔍"/>	Rating	<input type="text" value="Warm"/>
Industry	<input type="text" value="Manufacturing"/>	No. of Employees	<input type="text" value="25"/>
Annual Revenue	<input type="text" value="600000"/>		

**Address Information**

Street	<input type="text" value="c-8"/>
City	<input type="text" value="london"/>
State/Province	<input type="text" value="london"/>
Zip/Postal Code	<input type="text" value="458745"/>
Country	<input type="text" value="England"/>



**Additional Information**

Product Interest: --None--  
 SIC Code:   
 Number of Locations:

Current Generator(s):   
 Primary: No

**Description Information**

Description:

**Optional**

Assign using active assignment rule

Save Save & New Cancel

**Step 2 :-**

After Click Save button you can see new page on this page click on Follow link button. Leads can be converted to accounts. click on **Convert** button.

Mr. ricky jonne

in | | | | |

Customize Page | Edit Layout | Printable View | Help for this Page

Hide Feed

Post | File | Link | Poll

Write something... Share + Follow

Followers

No followers.

Show All Updates

There are no updates.

Open Activities [0] | Activity History [0] | Campaign History [1] | HTML Email Status [0]

**Lead Detail**

Edit Delete **Convert** Clone Find Duplicates

Lead Owner	voqesh sharma [Change]	Phone	254125487
Name	Mr. ricky jonne	Mobile	
Company	bisp	Fax	
Title	Mobile Add	Email	abc@bisp.com
Lead Source	Web	Website	http://bisp.com
Industry		Lead Status	Open - Not Contacted
Annual Revenue	Rs.600,000	Rating	Warm
		No. of Employees	25
Address	e-8 london, london 547856 England		
Product Interest		Current Generator(s)	
SIC Code		Primary	
Number of Locations			
Created By	voqesh sharma, 11/2/2013 9:51 AM	Last Modified By	voqesh sharma, 11/2/2013 9:53 AM
Description			

Edit Delete Convert Clone Find Duplicates

Chat

Double Click on here and give rating.

**Step 3 :-**

Leads can be converted to accounts, contacts, opportunities, and followup tasks. You should only convert a lead once you have identified it as qualified. After this lead has been converted, it can no longer be viewed or edited as a lead, but can be viewed in lead reports.

Convert Cancel

**Convert Lead** ! = Required Information

Record Owner

Send Email to the Owner

Account Name  [View](#)

Opportunity Name   
 Do not create a new opportunity upon conversion.

Converted Status

**Task Information**

Subject  Status

Due Date  [ 11/2/2013 ]

Priority

**Description Information**

Comments

Send Notification Email

**Reminder**

Reminder

Convert Cancel

## Web-to-Lead Setup

Using pre-existing pages on your company's website, you can capture contact and profile information from users and automatically generate new leads in salesforce.com, enabling you to respond in real-time to customer requests.

### How To Go Web-to-Lead Setup :

Click **Setup** -> **Customize** -> **Web-to-Lead**

salesforce 14

Search... Search

yogesh sharma Setup Help Sales

Home Chatter Campaigns Leads Accounts Contracts Opportunities Forecasts Contacts Cases Solutions Products Reports Dashboards All Details +

Quick Find

Expand All | Collapse All

Force.com Home

Build

- Customize
- Tab Names and Labels
- Home
- Activities
- Campaigns
- Leads
- Fields Limits
- Web-to-Lead
- Auto-Response Rules

## Web-to-Lead Setup

Help for this Page ?

Using pre-existing pages on your company's website, you can capture contact and profile information from users and automatically generate new leads in salesforce.com, enabling you to respond in real-time to customer requests.

My Website

First Name  
Last Name  
E-mail  
SUBMIT

Create New Lead

Web-to-Lead Settings

Edit Create Web-to-Lead Form

Web-to-Lead Enabled

Default Lead Creator yogesh sharma

**Step 1 :-** Select Fields in available list click on add button enter Return URL name then click on **Generate** button.

### Create a Web-to-Lead Form

Select the fields to include on your Web-to-lead form:

Available Fields		Selected Fields	
Salutation	Add	First Name	Up
Title		Last Name	
Website	Remove	Email	Down
Phone		Company	
Mobile		City	
Fax		State/Province	
Address			
Zip			
Country			

NOTE: Would you like to add custom fields that you do not see listed under Available Fields? You can set up custom lead fields to gather additional information from your website. [Tell me more.](#)

After users submit the Web-to-Lead form, they will be taken to the specified return URL on your website, such as a "thank you" page.

Return URL

Generate Cancel

## Step 2 :-

Select all code and copy and paste with in `<html>` **There is paste all code** `</html>` after pasting this code, make this code all you can add any web page for advertisement.

**Create a Web-to-Lead Form**

Copy and paste the sample HTML below and send it to your webmaster.

```
<!-- ----- -->
<!-- NOTE: Please add the following <META> element to your page <HEAD>. -->
<!-- If necessary, please modify the charset parameter to specify the -->
<!-- character set of your HTML page. -->
<!-- ----- -->

<META HTTP-EQUIV="Content-type" CONTENT="text/html; charset=UTF-8">

<!-- ----- -->
<!-- NOTE: Please add the following <FORM> element to your page. -->
<!-- ----- -->

<form action="https://www.salesforce.com/servlet/servlet.WebToLead?encoding=UTF-8" method="POST">

<input type="hidden" name="oid" value="00D900000000oOX9">
<input type="hidden" name="retURL" value="http://http://bispsolutions.com">

<!-- ----- -->
```

Select All Code and copy

Finished

## Cases

A case is a description of a customer's problem, feedback, or question. Use cases to track and solve your customers' issues. You can quickly create, edit, locate, and view cases from the Cases tab. To gather customer feedback from your company's website and customer emails.

### How To Create Case :

Home Chatter Campaigns Leads Accounts Contracts Opportunities Forecasts **Cases** Solutions Products Reports Dashboards All Details +

Create New... Cases Home Tell me more! | Help for this Page ?

View: All Closed Cases Go! Edit | Create New View

Recent Items

- Jhon deo
- coloege info
- voqesh sharma
- Cell phone's
- bisp

Recent Cases **New** Recently Viewed

No recent records. Click Go or select a view from the dropdown to display records.

## Step 1 :

Case Edit  
New Case

[Help for this Page](#) ?

**Case Edit** Save Save & Close Save & New Check Spelling Cancel

---

**Case Information** ! = Required Information

Case Owner	yogesh sharma	Status	New
Contact Name	Jhon deo	Priority	High
Account Name	Bisp Trainings	Case Origin	Web
Type	Electrical		
Case Reason	Installation		

---

**Additional Information**

Product	--None--	Engineering Req Number	
Potential Liability	--None--	SLA Violation	--None--

---

**Description Information**

Subject	
Description	
Internal Comments	

---

**Optional**

- Assign using active assignment rules
- Send notification email to contact

Save Save & Close Save & New Check Spelling Cancel

After clicking on save button, you can make new web page as you can see below. This is how you can find solution for cases.

**Solutions** View Suggested Solutions or  Find Solution [Solutions Help](#) ?

No Solutions Attached

Click on View Suggested Solution button or you can find

## Step 2 :

Click on **Select** link



# Find Solution for Case 00001026

[Help for this Page](#) ?

Case Owner	<a href="#">yogesh sharma</a>	Contact Name	<a href="#">Jhon deo</a>
Status	New	Email	<a href="#">jhon@bisp.com</a>
Case Number	<a href="#">00001026</a>	Phone	45875445
Subject			

Enter keywords to find matching solutions.

## Relevant Reviewed Solutions [1]

[Customize...](#) ▼

Action	Solution Title	Score	Status	Author Alias	Num Related Cases	Last Modified Date
<a href="#">Select</a>	<a href="#">GenWatt Installation Services</a> GenWatt Corporation has a full-service support organization offering customers every type of installation assistance -- from complete start-to-finish,...	100%	Reviewed	<a href="#">yshar</a>	0	8/30/2013 3:17 PM

## Relevant Unreviewed Solutions [1]

[Customize...](#) ▼

Action	Solution Title	Score	Status	Author Alias	Num Related Cases	Last Modified Date
<a href="#">Select</a>	<a href="#">Electrical wiring installation for GC5060</a> The red wiring from the top electronic panel of the GC5060 and the yellow wiring on the main generator assembly have to be connected together....	34%	Draft	<a href="#">yshar</a>	0	8/30/2013 3:17 PM