



Getting Started with Salesforce CRM

Getting Started with SALESFORCE Part XI

Description:

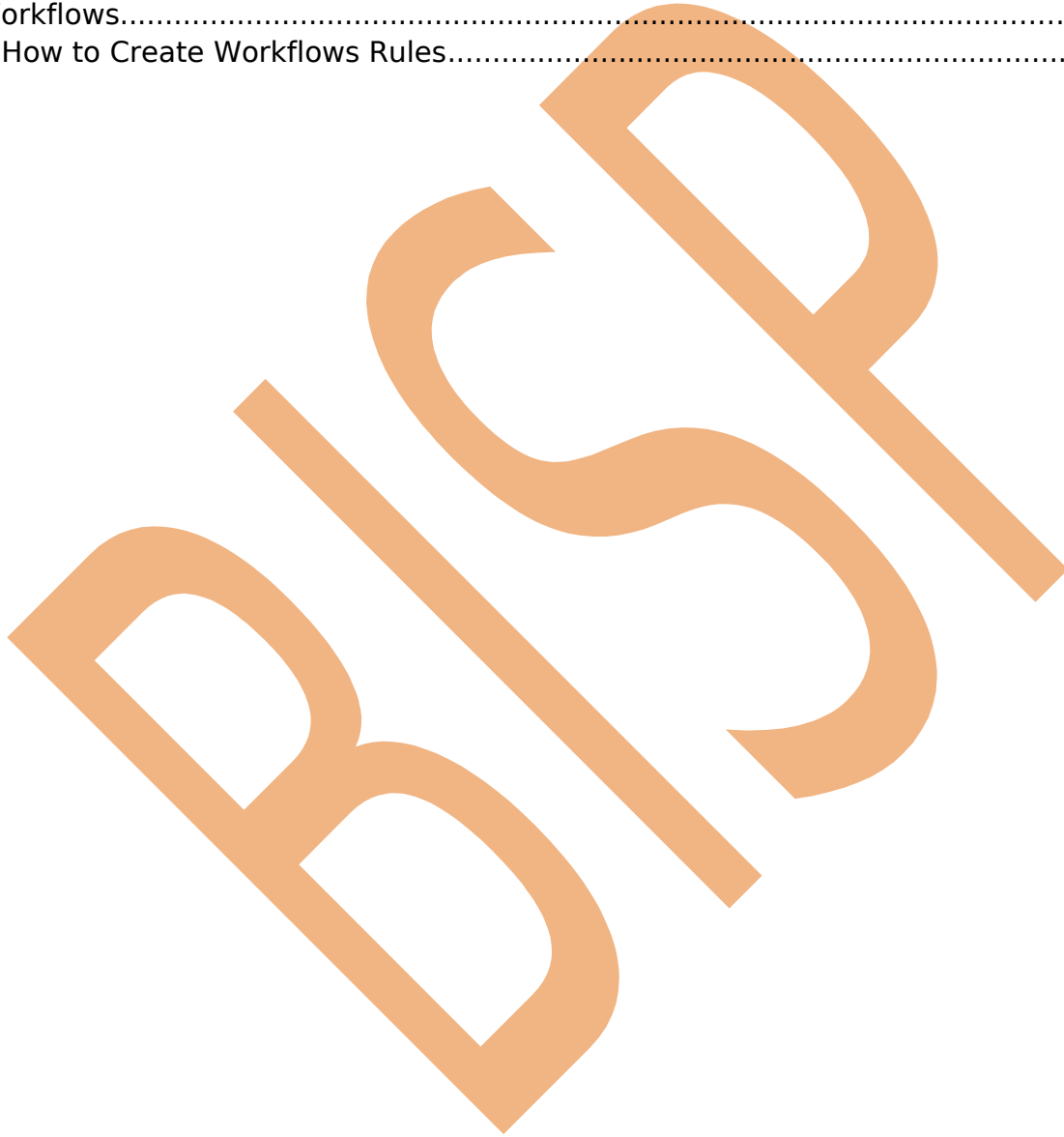
BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for Salesforce. The document focuses record type and workflow rules. **Join our professional training program and learn from experts.**

History:

Version	Description Change	Author	Publish Date
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Record Types

To create or change record types

Record types allow you to offer different business processes, Provide different pick list values and different page layouts to different profile based on the business requirement.

By using record types you can differentiate two or more fields

Ex:- (If you have two or more branches of the Organization. by using By using record types you can differentiate this branch)

Note :- For Create Record Type First you will creating page layout.

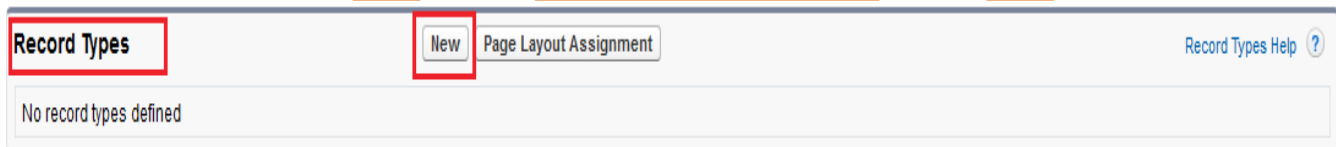
Go to Custom object for Ex- **Setup > Create > Objects** . Select any object name (Ex :- Positions)

Then go down and find Page layout, Click on **New** button, After that select Existing Page Layout and give the Page Layout Name then click on **Save** button.

Creating Record Types

Go **Setup > Create > Objects**

In this page scroll down and find **Record Types**. You can see below. After that click **New** button.



Step 1 :-

In this page select Existing Record Type '-- Master --', Give Record Type Label, Description, and make sure **Active** check box should be checked.

Step 1. Enter the details Step 1 of 2

Enter a name and description for the new record type. The new record type will include all the picklist values from the existing record type selected below. After saving the new record type, you will be able to customize the picklist values.

Record Type = Required Information

Existing Record Type: --Master--

Record Type Label: IT Layout

Record Type Name: IT_Layout i

Description: This is for department.

Active: ↖ Make sure this should active.

Select the Enable for Profile checkbox to make the new record type available to a profile. Users assigned to this profile will be able to create records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select the Make Default checkbox.

According you need checked or uncheck the checkbox and click to Next button.

Profile Name	Record Types Currently Available	<input type="checkbox"/> Enable for Profile	<input type="checkbox"/> Make Default
Chatter External User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Chatter Free User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Chatter Moderator User		<input type="checkbox"/>	<input type="checkbox"/>
Contract Manager		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
cp		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - App Subscription User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - Free User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gold Partner User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Marketing User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Partner App Subscription		<input type="checkbox"/>	<input type="checkbox"/>
Read Only		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Recruiter		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Silver Partner User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Solution Manager		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard Platform User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Standard User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Administrator		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[Cancel](#)

Step 2 :- Assign page layout :

There is you can choose any one type " Apply one layout to all profile " or "Apply a different layout for each profile "

After that you can click on Save button. don't click on **Save & New** button. if click on Save and New button Salesforce not provide to you Edit mod pick list value

Position Record Type IT Layout
 Record Type Name IT_Layout
 Description This is for department .

Select the page layout that users with this profile see for records with this record type. After saving, choose the picklist values that are available with this record type.

Apply one layout to all profiles IT Layout
 Apply a different layout for each profile

By Selecting this option you can provide defrent-2 page layout to defrent-2 profile

Profile:	Page Layout
Chatter External User	IT Layout
Chatter Free User	IT Layout
Chatter Moderator User	IT Layout
Contract Manager	IT Layout
cp	IT Layout
Custom: Marketing Profile	IT Layout
Custom: Sales Profile	IT Layout
Custom: Support Profile	IT Layout
Force.com - App Subscription User	IT Layout
Force.com - Free User	IT Layout
Gold Partner User	IT Layout
Marketing User	IT Layout
Partner App Subscription	IT Layout
Read Only	IT Layout
Recruiter	IT Layout
Silver Partner User	IT Layout
Solution Manager	IT Layout
Standard Platform User	IT Layout
Standard User	IT Layout
System Administrator	IT Layout

Don't click on Save & New button. if click on Save and New button salesforce not provide to you Edit mod pick list value

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

After that Record type created see below. If you need to edit click on Edit button you can edit this Record type.

Use the Edit button to change the properties of this record type. Use the Edit links in the Picklist Values related list to choose the picklist values available for records with this record type.

Edit

Record Type Label	IT Postion	Active	<input checked="" type="checkbox"/>
Record Type Name	IT_Postion		
Namespace Prefix			
Description			
Created By	vogesh sharma, 10/22/2013 1:08 PM	Modified By	vogesh sharma, 10/22/2013 1:08 PM

Picklists Available for Editing

[Picklists Available for Editing Help](#)

Action	Field	Modified Date
Edit	City	10/22/2013 1:08 PM

Step 3 :-

After that click on Edit button and select city list for It position.

General Properties

Field Label City
Record Type IT Postion

Picklist Values

Select an item from the Available Values list and add it to the Selected Values list to include it as a picklist value for this Record Type. Note that removing an item from the picklist does not remove it from any existing records. Finally, select a default picklist value for this Record Type.

Available Values
Delhi
Gwalior

Selected Values
Bhopal
Pune
Hyb

Add
Remove

Default --None--

Save Cancel

Step 4 :-

Click on **Positions Tab** then click **New** button.

Then you can see this page show **Record Type of a New Record**. Select Record type and click on **Continue** button.

New position
Select position Record Type

Select a record type for the new position. To skip this page in the future, change your record type settings on your personal setup page.

Select position Record Type

Record Type of new record Non IT Postion

Continue Cancel

There you can see in city show only IT Position name it not show Non IT city's. If you select Non It Position it show only Non it Position.

positionN Edit Save Save & New Cancel

Information | = Required Information

position Name Software Engineer Owner yogesh sharma

City Pune
Min Pay --None--
Open date Pune 06 PM [10/22/2013 2:06 PM]
Hyb

Max Pay 850000
Close date 11/28/2013 2:06 PM [10/22/2013 2:06 PM]

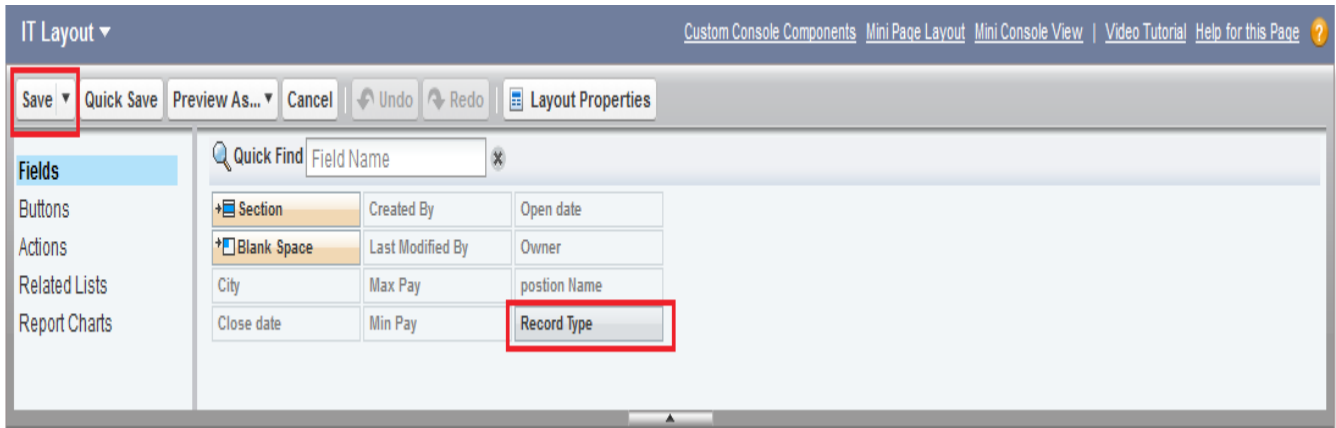
There you can see, in this drop down show only IT Postion city's

Save Save & New Cancel

Page Layout show in IT Position :

Go IT Position Page Layout click on **Edit** link.

there is you can see **Record Type** button is visible just drag and drop in IT Position Page Layout. and click on Save button.

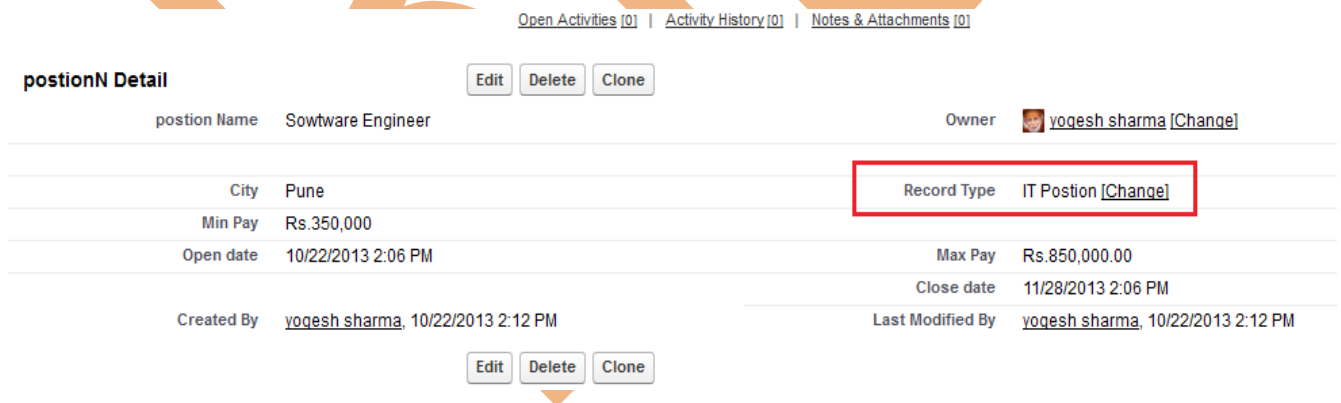


You can see below.



Click on Save button.

Then Click on Positions Tab and click on **It Position** record. There is you can see that Record Type Description is show. see below



Workflows

Is the automated business logic engine of Salesforce Developer Code which will perform actions like.

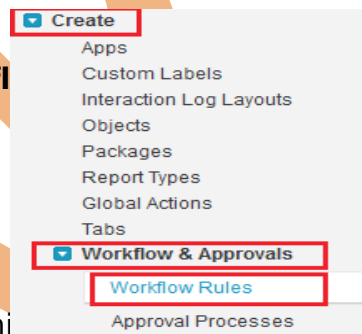
OR

Workflows is a tools of Salesforce. It provide to you some features assign task, sending mail, field update and out bound message.

- **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.

How to Create Workflows Rules

Setup > Create > Workflows & approvals > Workfl



step 1 :-

Click on Workflows Rules link then open new page on this you can see about workflow Rules. . you can see below.

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

Step 2 :-

on this page two option one for Create New View link click on this link you can create new specific view for you 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

New Rule			
Rule Name ↑	Description	Object	Active
No records to display.			

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 i

How do I choose?

For Information click here.. Select any one for your requirement

Rule Criteria

Run this rule if the following criteria are met 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

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 , 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](#)

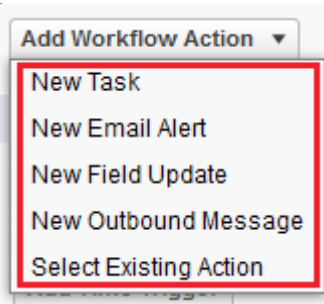
Add Time Trigger Schedule time for add workflow click here 2

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 that your task add you can **Edit** or **Remove** this task. Click on **Done** button for complete 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
Edit Remove	Task	Schedule Interview

[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 not activated by default you have activated manually click on activated 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	yogesh sharma, 10/23/2013 11:51 AM	Modified By	yogesh 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	yogesh sharma, 10/23/2013 11:51 AM	Modified By	yogesh sharma, 10/23/2013 1:05 PM