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
0.1	Initial Draft	Chandra Prakash Sharma	11th Sep 2013
0.1	Review#1	Amit Sharma	12th Sep 2013

Contents

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.

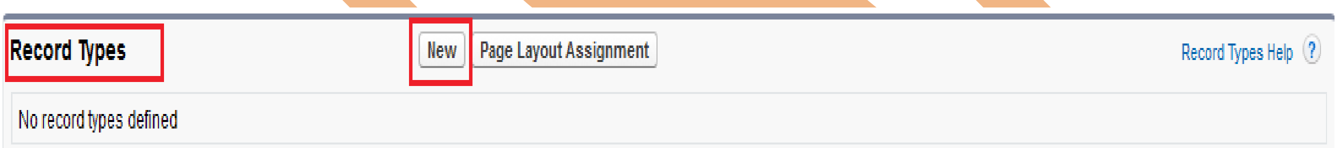
By using record types you can differentiate two or more fields
Ex:- (If you have two or more branches of the Organization. by using By using record types you can differentiate this branch)

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

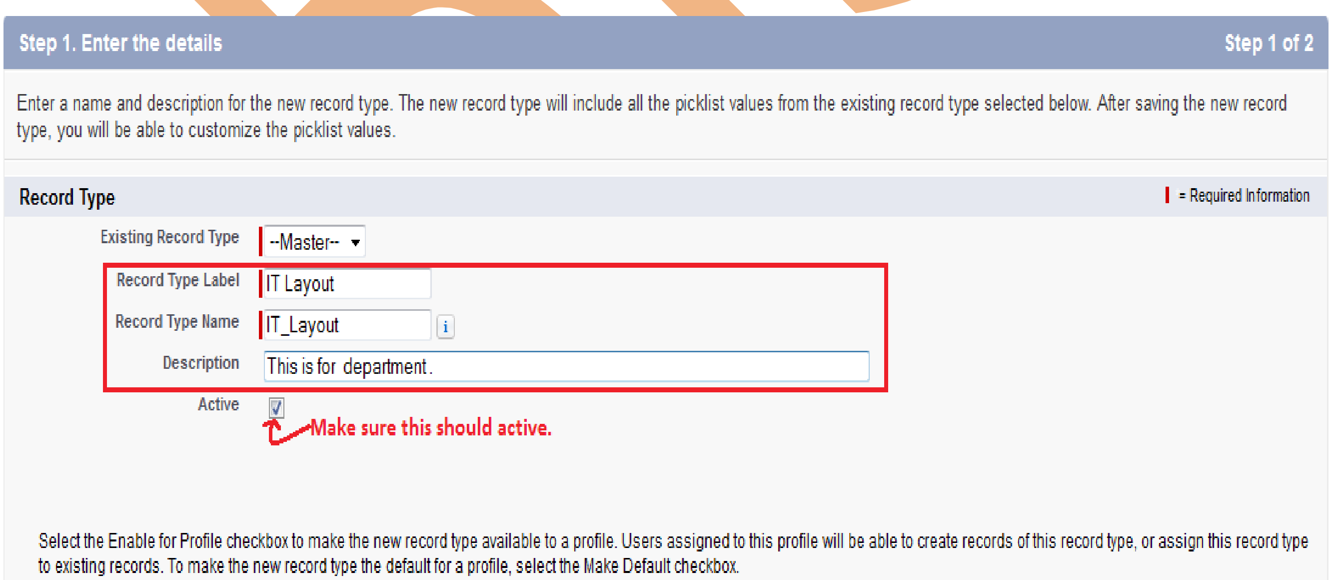
Go **Setup** > **Create** > **Objects**

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

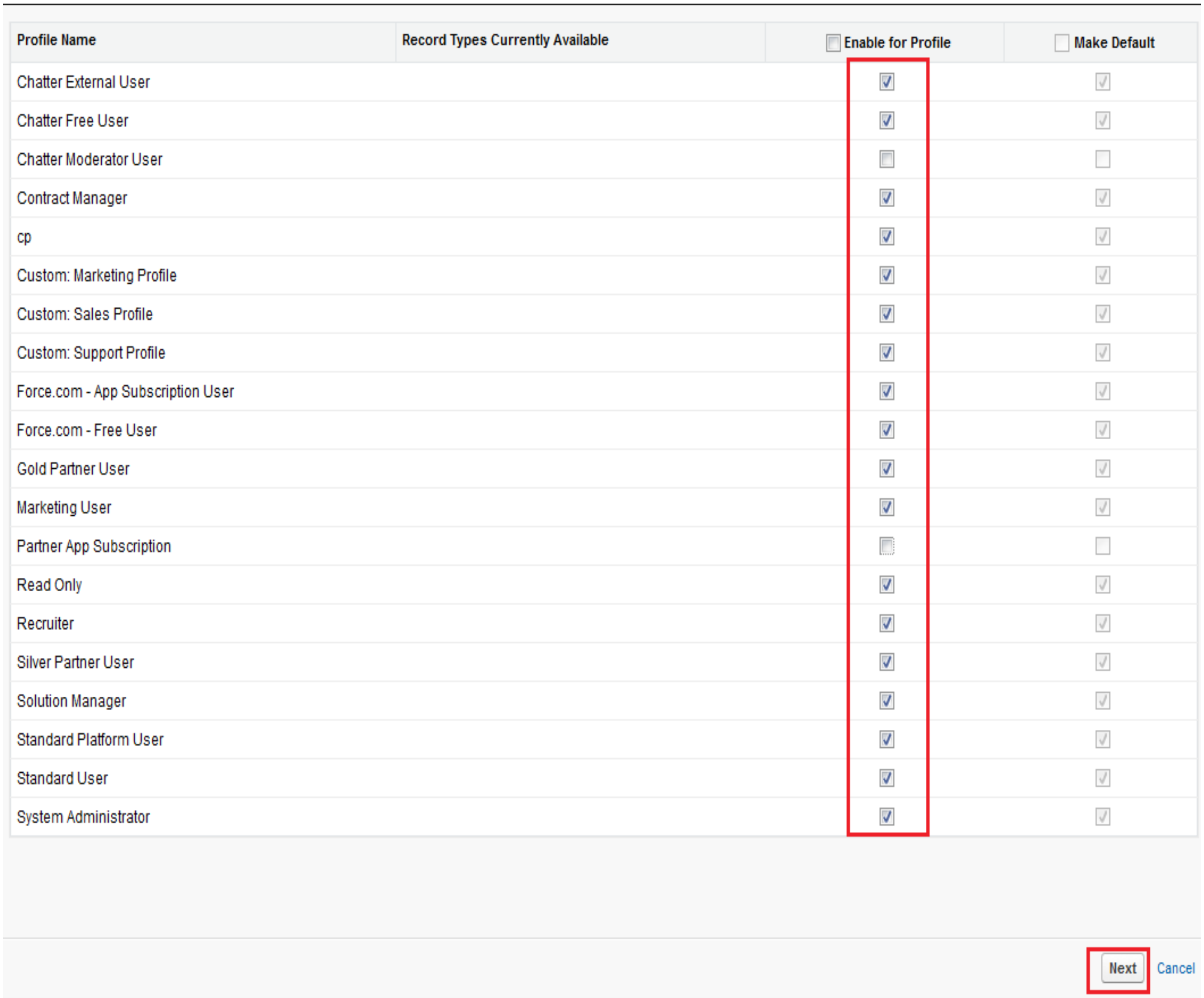


Step 1 :-

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



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



Profile Name	Record Types Currently Available	☐ Enable for Profile	☐ Make Default
Chatter External User		☑	☑
Chatter Free User		☑	☑
Chatter Moderator User		☐	☐
Contract Manager		☑	☑
cp		☑	☑
Custom: Marketing Profile		☑	☑
Custom: Sales Profile		☑	☑
Custom: Support Profile		☑	☑
Force.com - App Subscription User		☑	☑
Force.com - Free User		☑	☑
Gold Partner User		☑	☑
Marketing User		☑	☑
Partner App Subscription		☐	☐
Read Only		☑	☑
Recruiter		☑	☑
Silver Partner User		☑	☑
Solution Manager		☑	☑
Standard Platform User		☑	☑
Standard User		☑	☑
System Administrator		☑	☑

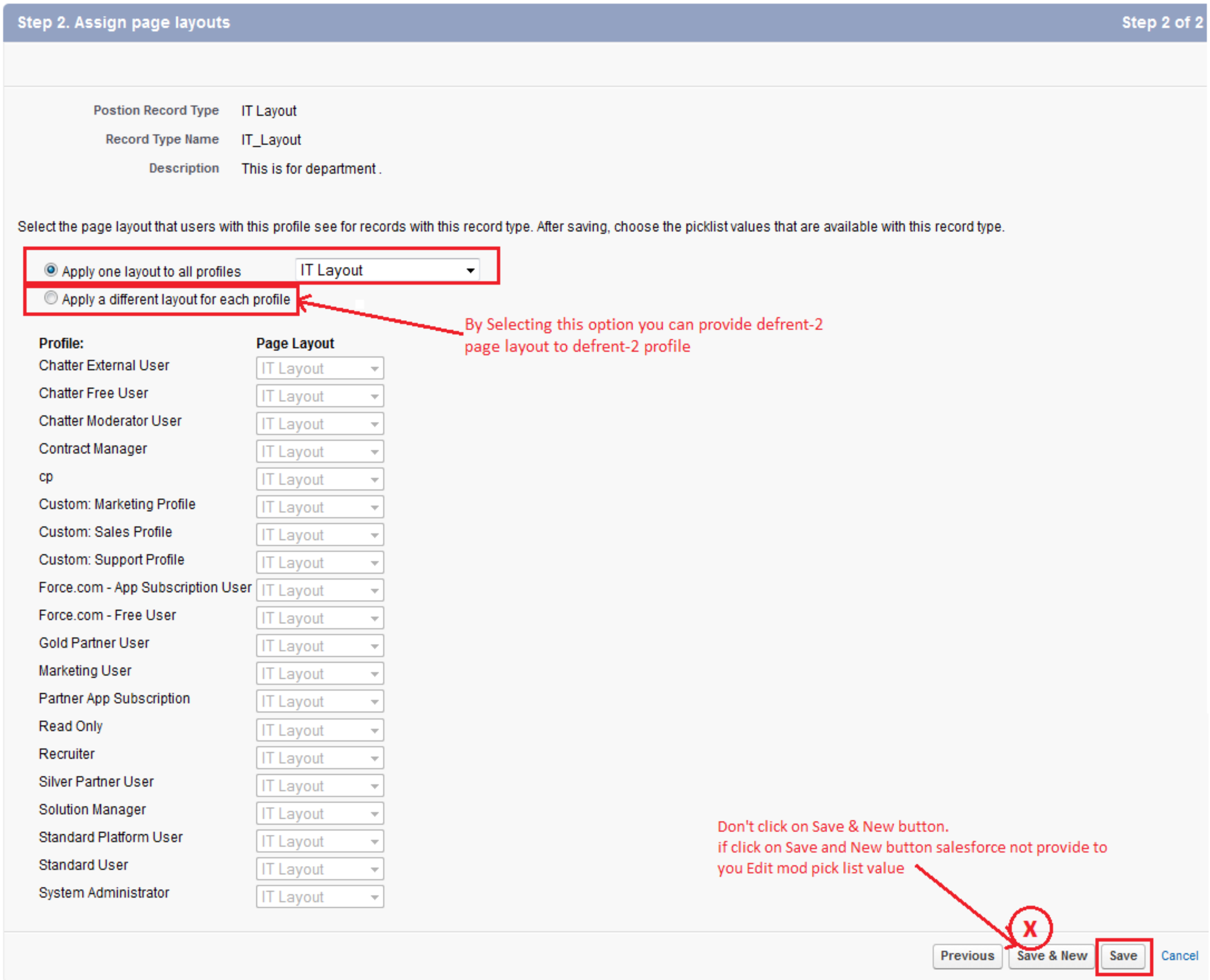
Next Cancel

Step 2 :-

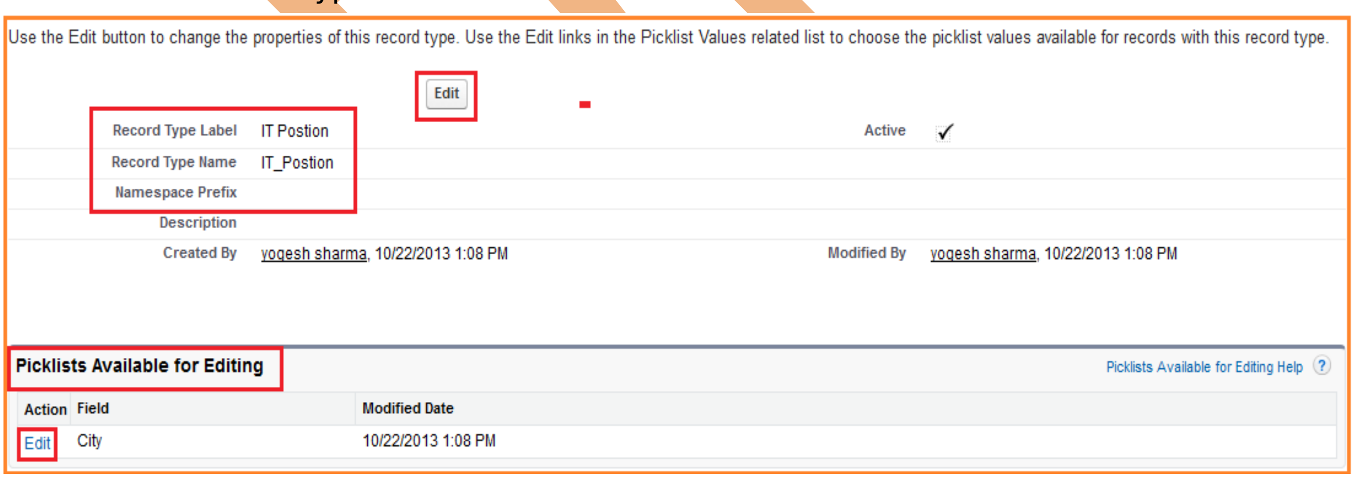
Assign page layout :

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

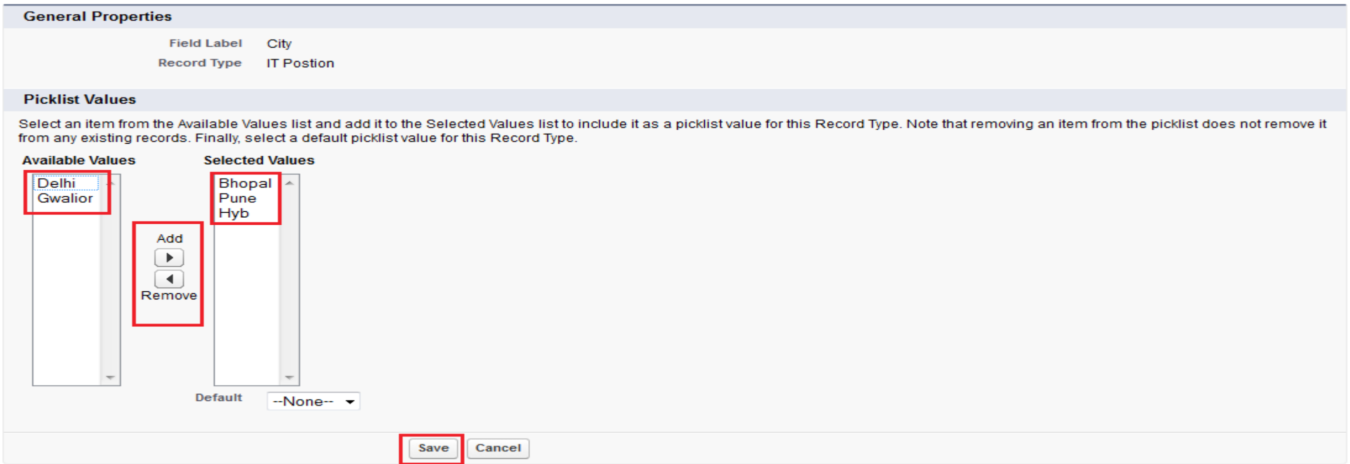


After that Record type created see below. If you need to edit click on Edit button you can edit this Record type.



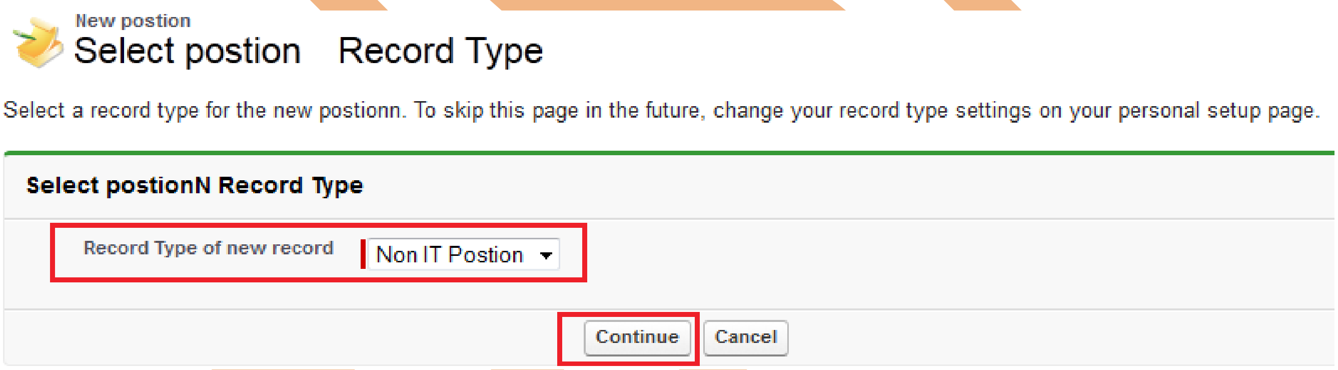
Step 3 :-

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

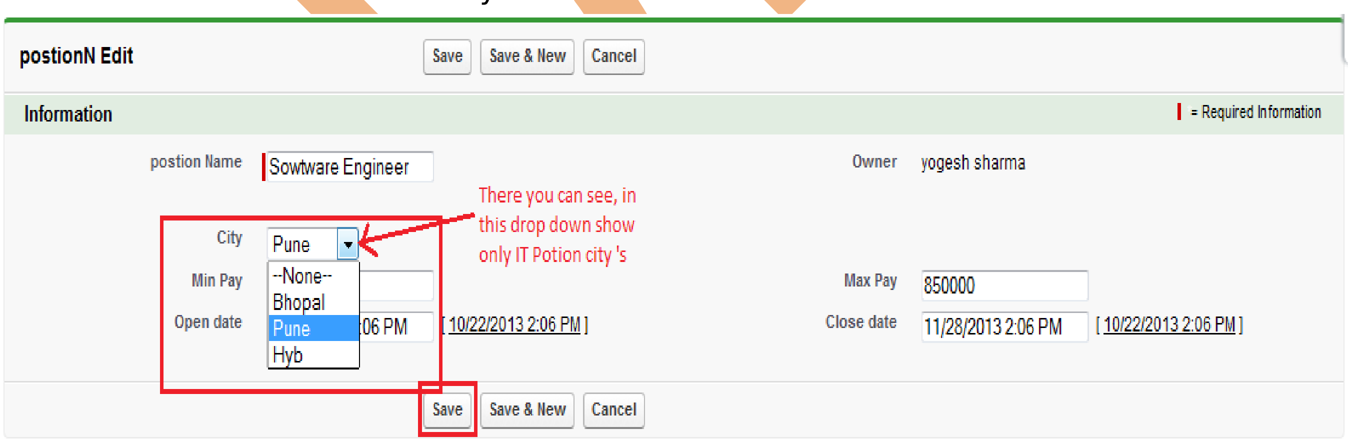


Step 4 :-

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.

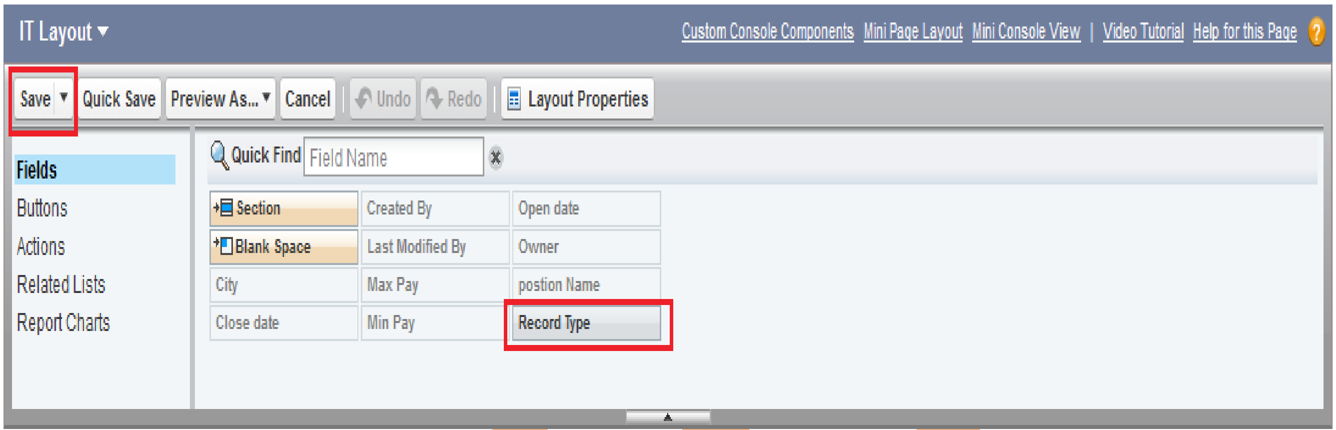


There you can see in city show only IT Position name it not show Non IT city's. If you select Non It Position it show only Non it Position.

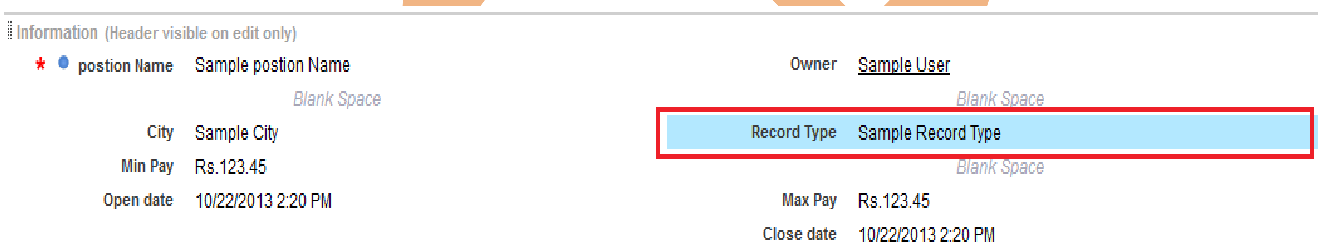


Page Layout show in IT Position :
Go IT Position Page Layout click on **Edit** link.

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

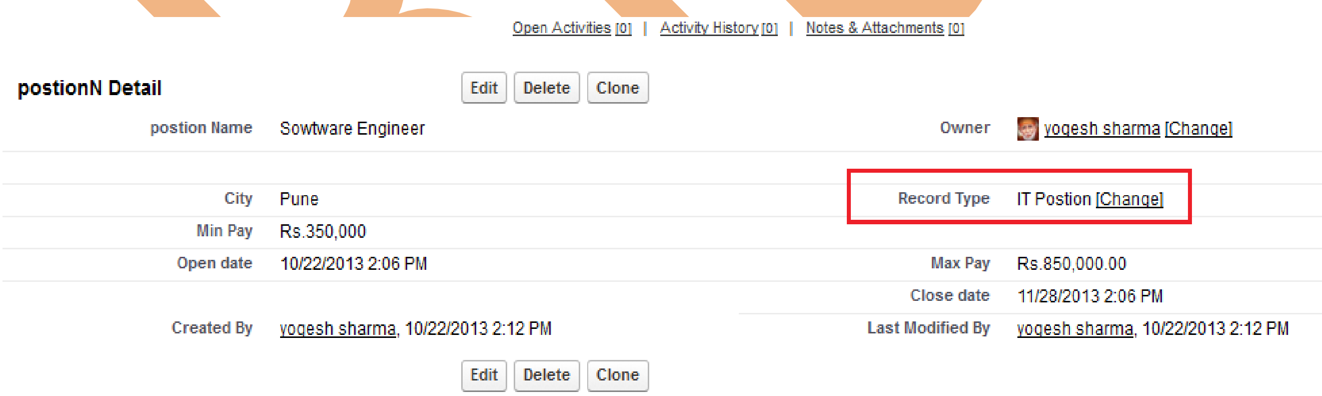


You can see below.



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.

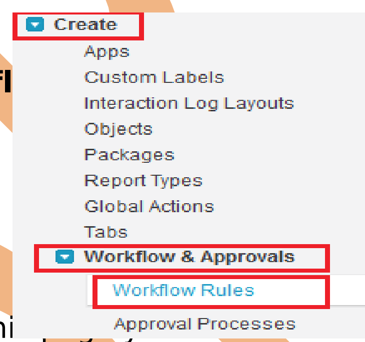
OR

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.

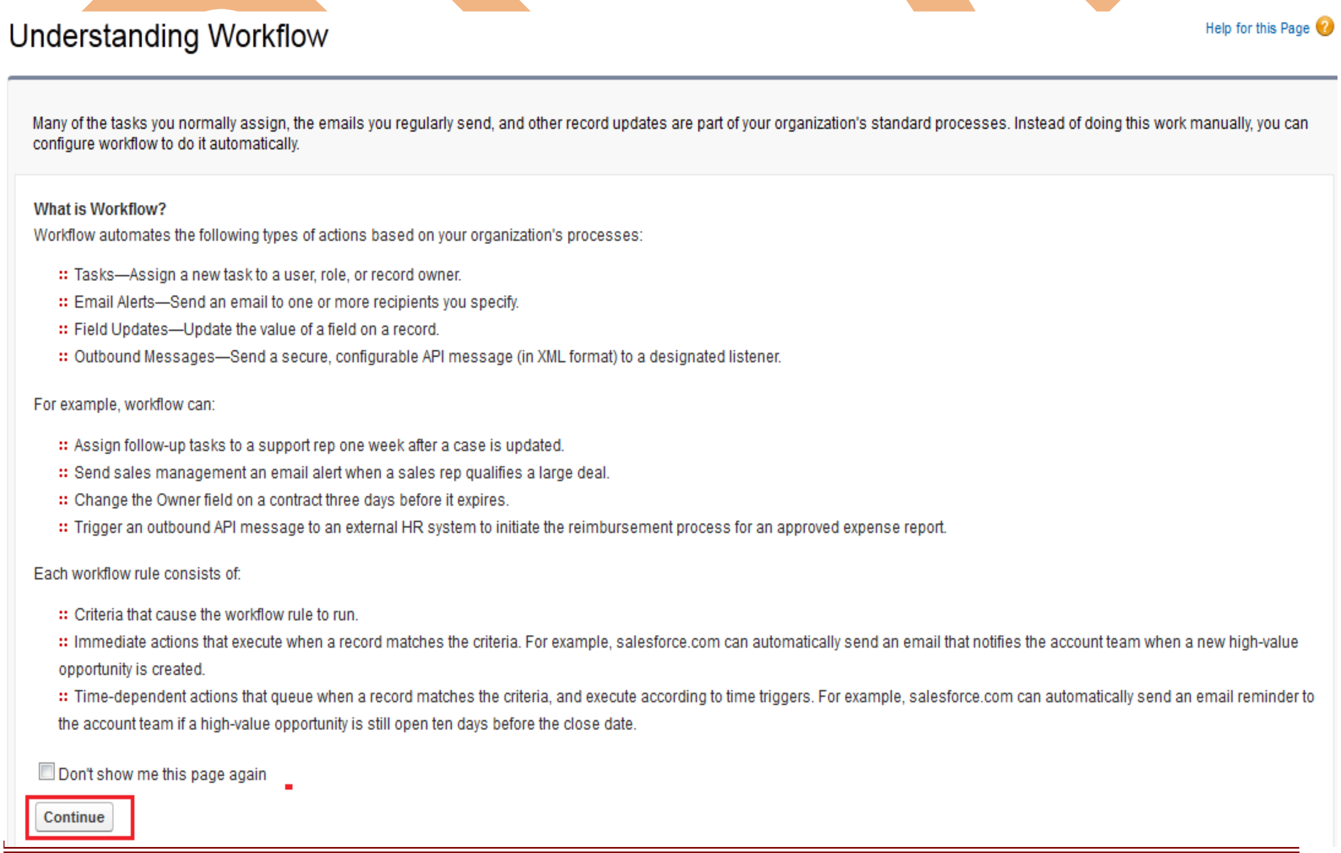
How to Create Workflows Rules

Setup > **Create** > **Workflows & approvals** > **Workfl**



step 1 :-

Click on Workflows Rules link then open new page on thi
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

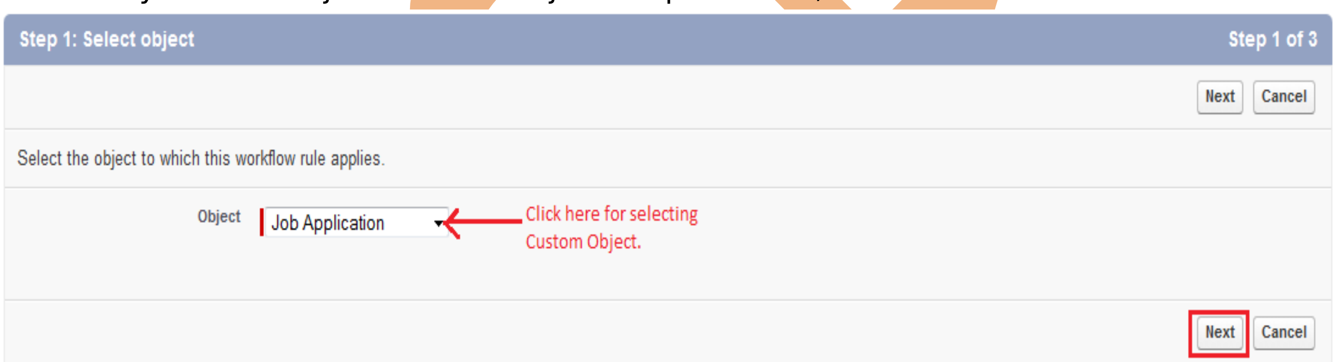
Continue

Step 2 :-

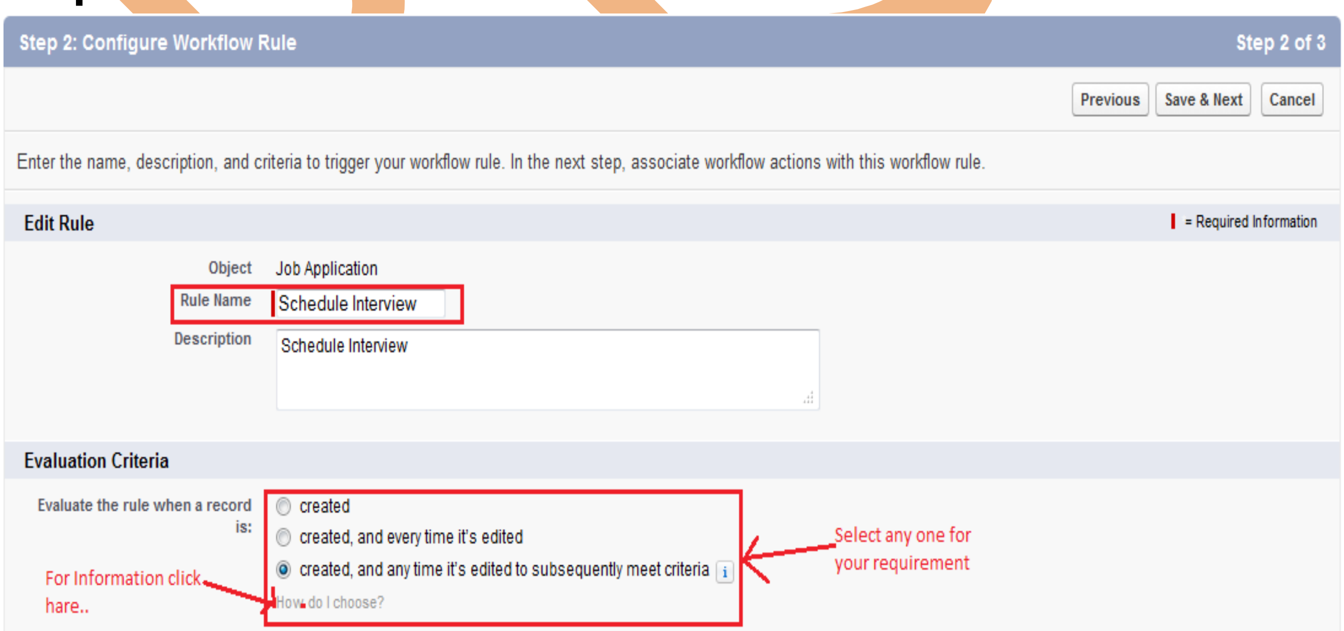
on this page two option one for Create New View link click on this link you can create new specific view for you organization. Second option is New Rule button. Click on New Rules button.

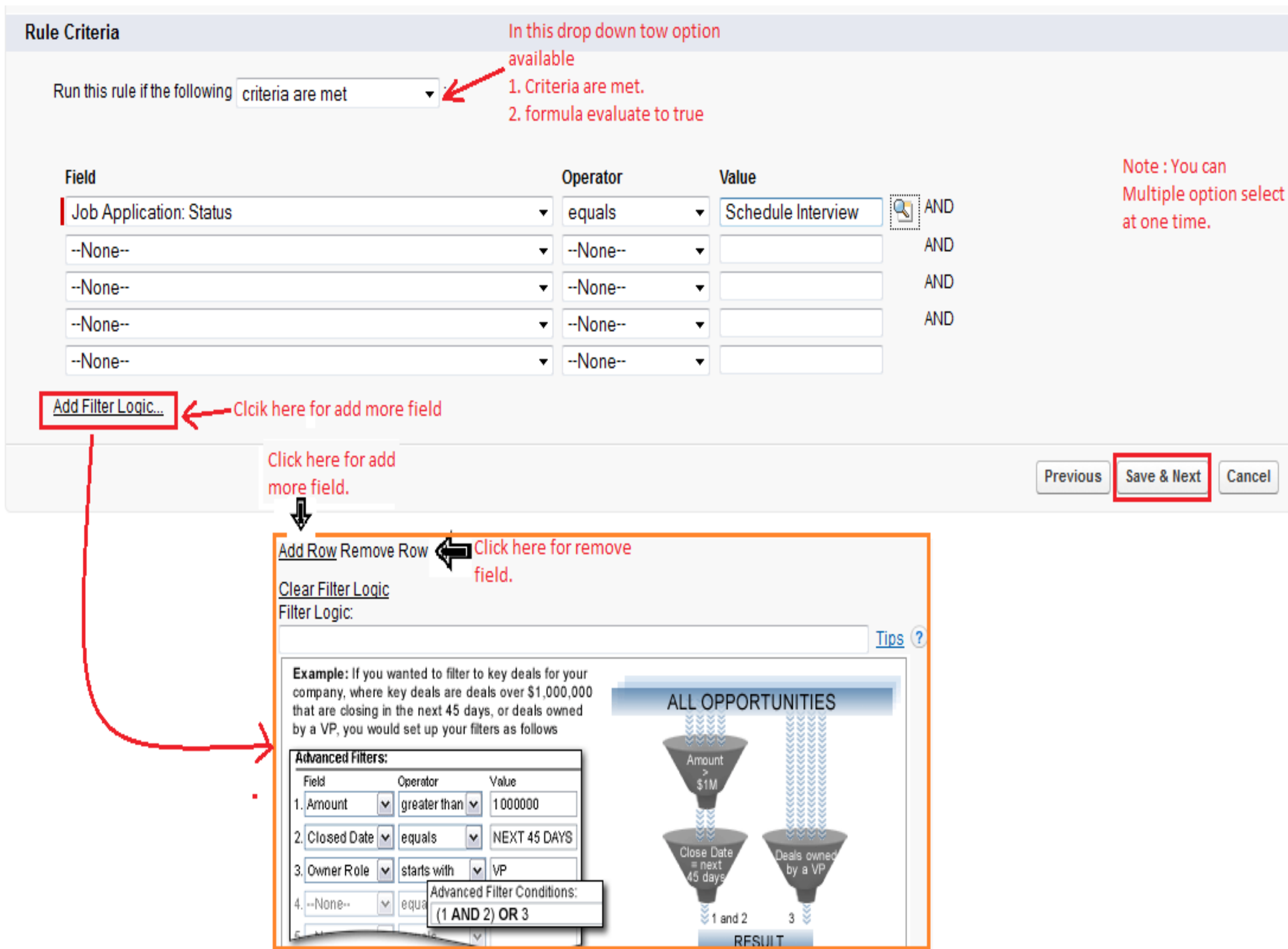
Step 3 :-

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



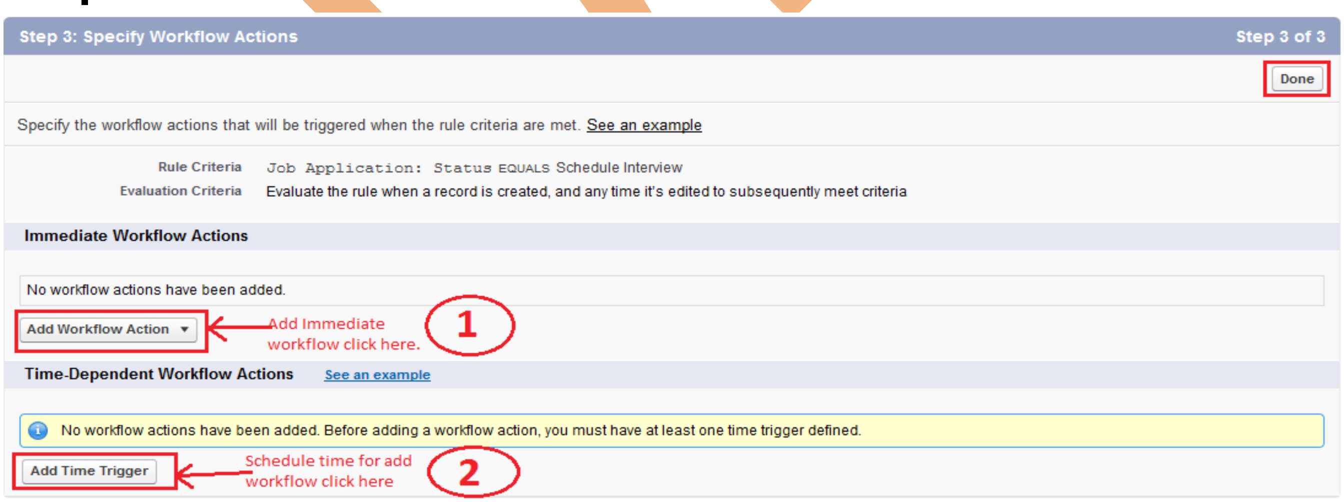
Step 4 :-





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.

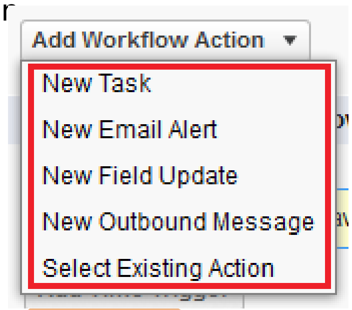
Step 5 :-

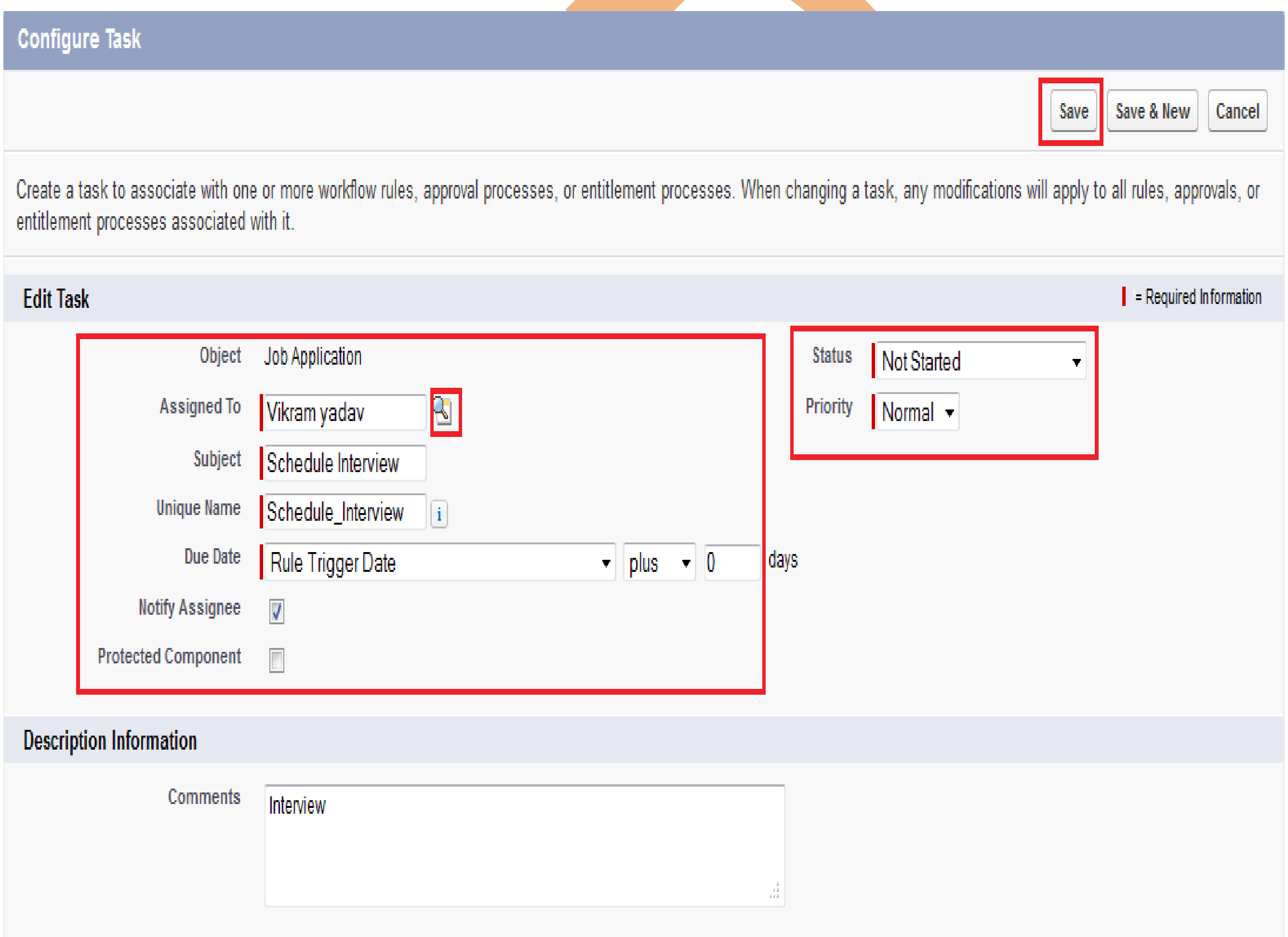


You can choose any one **Add workflow Action** OR **Add Time Trigger**

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

Note :- You can select multiple option.

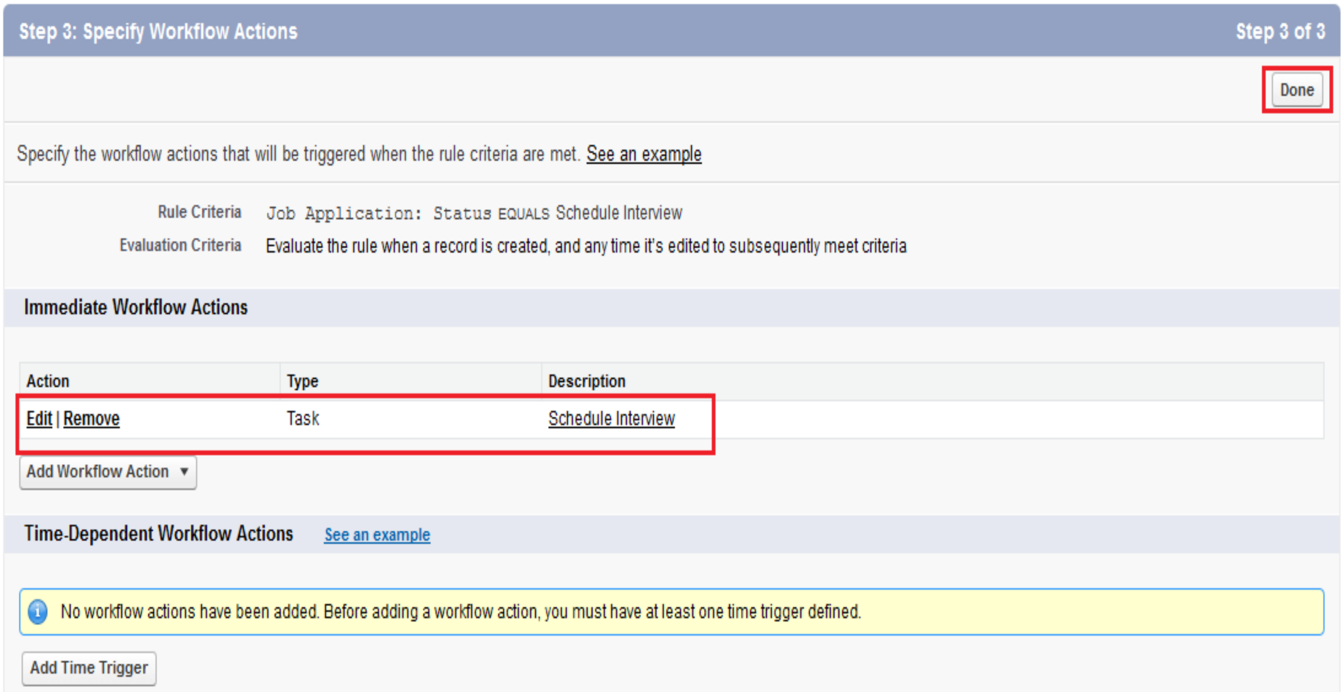




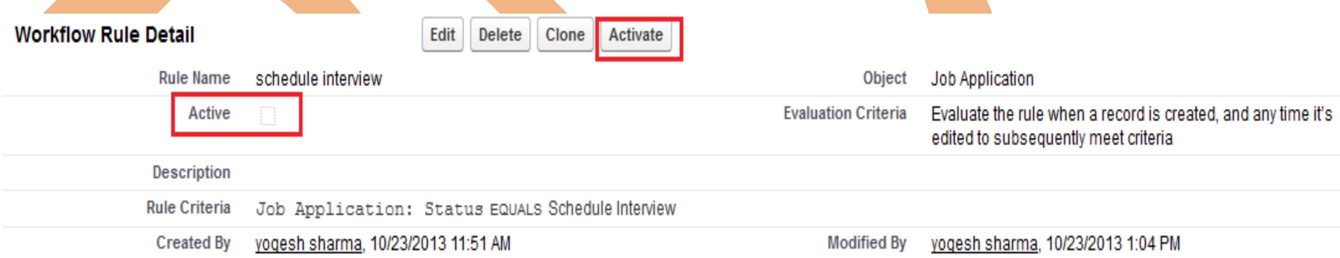
Fill some fields, Assign To ,Subject, Unique Name, Due date (in due date you can choose option for date type), Status, Priority.

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.



Note :- Workflows Rules not activated by default you have activated manually click on activated button for active rules. see below.



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