

## SESSION 18

### About Email Templates

You can create four different types of email templates:

1. Text
2. HTML with letterhead
3. custom, and
4. Visualforce.

**Note:** All of these email templates can include text, merge fields, and attached files.

### Create Text Email Templates

Navigation in Classic: Setup | Administer | Communication Templates | Classic Email Templates

Click 'New Template' Button

1. Choose the Text template type, and click **Next**.
2. Choose a folder in which to store the template.
3. To make the template available for use, select the Available For Use checkbox.
4. Enter a name in Email Template Name. (if necessary, change the Template Unique Name).
5. Leave the default option in Encoding dropdown list.
6. Enter a Description for the template. Both template name and the description are for your internal use only.
7. Enter a Subject for the message.
8. Enter the text of the message with merge fields as below. Refer the next to choose the merge fields

Dear Manager,  
We have on boarded Customer with below Revenue.  
Customer Name: {!Account.Name}  
Annual Revenue: {!Account.AnnualRevenue}  
Industry: {!Account.Industry}  
Thanks,  
Sales Rep

9. If desired, enter merge fields in the template subject and text body. When you send an email, these fields are replaced with information from your records.

Here choose the Object name from Select Field Types under "**Available Merge Fields**" as marked in the screens show below

10. Click **Save**.

**Now template is ready and can be used in many places such as**

- Workflows
- Approval Process
- Process Builder
- Web-to-Lead
- Web-to-Case
- Email-to-Case or On-Demand Email-to-Case
- Assignment rules
- Escalation rules
- Auto-response rules

### What is Merge Fields?

Your template content can store fields that show field values from different objects. These merge fields automatically update in your content when the referenced field updates on the other object.

A merge field is a field you can put in an email template, mail merge template, custom link, or formula to incorporate values from a record.

Merge fields take the format of **{!ObjectName.fieldname}** in your template content.

### **WHAT IS WORKFLOW?**

Business Automation Feature in Salesforce used to automate repeated organization activities such as

1. Tasks you normally assign
2. Email we regularly send
3. Field Update
4. Sending info to external systems

Instead of doing this work manually, you can configure workflow to do it automatically.

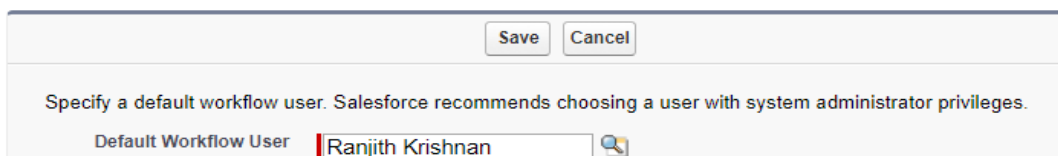
**Activities for examples, an organization would do regularly multiple times.**

1. Send email notification to sales group when new account is created.
2. Send sales management an email alert when a sales rep qualifies a large deal.
3. Send an email notification to sales group when an opportunity is closed lost.
4. Assign a follow up task to opportunity owner 5 days before the closed date if the opportunity is not closed.
5. Share information to external system whenever any new account is created
6. When Annual Revenue of account is greater than 5Mm then updates the rating field to hot.

**Before implementing this workflow:**

- i. To use in email action, create a custom email template if required to have standard message and merge fields from account object (Refer the email template topic in this doc and use the similar template here in this example). Use this email template to set standard message for email alert in workflow action.
- ii. Create a public Group 'Sales Team' and add some users. Select this group to send email alert.
- iii. Set Default Workflow User under Build | Create | Workflow Rules & Approval | **Process Automation Settings**

### **Process Automation Settings**



Select a Default Workflow User that you want Salesforce to display with a workflow rule when the user that triggered the rule is not active.

### **Steps involved in implementing the workflow**

#### **Navigation:**

Lightning Experience: Setup Home | Process Automation | Workflow Actions | Workflow Rules

Classic: Setup | Build | Create | Workflow Rules & Approval | Workflow Rules

**Step 1:** Choose the object on which the process to be set.

**Step 2:** Set the criteria

- i. Evaluation Criteria
- ii. Rule Criteria

**Step 3:** Set the actions to be fired **immediately** or on **particular time** when the criteria in Step 2 is met.

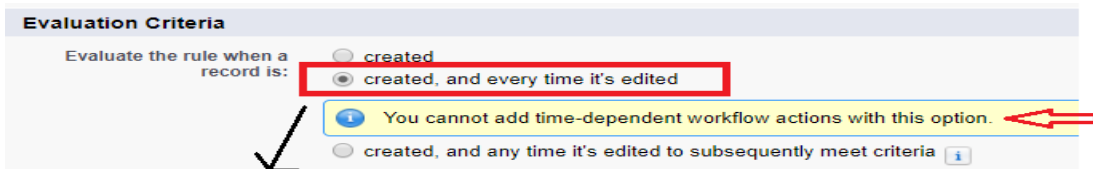
The below Actions can be fired using workflow feature

1. **Send Email Alert**
2. **Assigning a Task**
3. **Update Field values**
4. **Send message to external system (referred as Outbound Message).**

The Evaluation Criteria (**From Step 2**) helps to decide when the rule criteria must be evaluated whether for new record or when modified the existing record. There are three evaluation criteria settings are available in workflow as below.

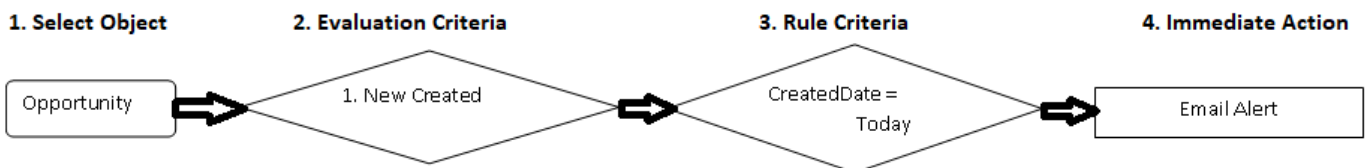
1. New Created
2. Created and Every time it is edited
3. created, and any time it's edited to subsequently meet criteria

**Note:** When Evaluation Criteria is 2 (Created and Every Time it is edited), then it is **NOT** allowed to add time-dependent workflow action.



**When Evaluation Criteria 2 is chosen, the time dependent actions can not be set.**

**1. Scenario for Immediate Action:** Send email notification to sales group when new account is created.



**Under Step 4: Choose Email Alert and enter values as below**

Fields	Value	Comments
Unique Name	Email to Sales Team about new account	Enter a unique name to refer to this component in the API.
Object	Account	If available, choose an object for this email alert.
Email Template	Email to Manager Template	Choose an email template that we created already with merge fields
Recipient Type	Choose the public Group "Sales Team"	Select who receives this email alert in the <b>Available Recipients</b> list and click <b>Add</b> .
Additional Emails		Enter up to five additional email addresses for recipients who aren't Salesforce users, leads, or contacts.
From Email Address	Select Current User's email address	

**About From Email Address Field**

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Either the default workflow user or a previously configured and then verify the organization-wide address. This field lets you use a standard email address for your organization (such as support@company.com) instead of the default **From** field, which is the email address of the person who updates the record.

### To set organization Wide Address

Go to Setup | Administer | Email Administration | Organization-Wide Addresses

### Add your email (other than users email address assuming this as an email for company) and verify Organization-Wide Email Addresses

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

Organization-Wide Email Addresses				
Actions	Display Name	Email Address	Allowed Profiles	Status
Edit   Del	ranvk	ranvk@rediffmail.com	System Administrator	Verified

This will then appear in From Address field in Email Alert as follows

From Email Address

Current User's email address  
Current User's email address  
Default Workflow User's email address  
"ranvk" <ranvk@rediffmail.com>

Make this address the default From email address for this object's email alerts. [i](#)

If you select **Make this the default From email address for this object's email alerts**, this email address overrides the **From Email Address** for all email alerts associated with that object. You can still customize individual email alerts to use a different **From Email Address**

Now click done and activate the workflow. Unless it is activated, workflow will not be evaluated and hence no actions will be fired.

### Workflow Rule

#### Send message to Sales Team about new Account

Workflow Rule Detail		Edit	Delete	Clone	Activate
Rule Name	Send message to Sales Team about new Account				
Active	<input type="checkbox"/>				
Description	Send message to Sales Team about new Account				
Rule Criteria	Account : Created Date EQUALS TODAY				

### How to test this work flow?

Step 1: Create a new Account record

So per the action, the email should be been sent to

### Scenario to understand the Evaluation Criteria

Workflow on Opportunity object to send Email Alert when

Criteria: Amount > 5000

#### When Evaluation Criteria is 1: New Created

Event	Record Field Values	Will action be taken? ( Yes / No )
New Opportunity ABC is created	Amount = 4000	No
Opportunity ABC is modified	Amount = 5500	No
New Opportunity CDE is created	Amount = 6000	Yes

When Evaluation Criteria is 2: created, and every time it's edited

Event	Record Field Values	Will action be taken? ( Yes / No )
New Opportunity CCC is created	StageName = Prospecting , Amount = 3000	No
Opportunity CCC is Modified	StageName = Negotiating, Amount = 5200	Yes
Opportunity CCC is Modified	StageName = Quote, Amount = 5200	Yes
Opportunity CCC is Modified	StageName = Quote, Amount = 5200 Next Step = 'Verify with Quote PM'	Yes

**When Evaluation Criteria is 3: created, and any time it's edited to subsequently meet criteria**

Event	Record Field Values	Will action be taken? ( Yes / No )
New Opportunity EEE is created	Amount = 5200 StageName = Prospecting	Yes
Opportunity EEE is Modified	StageName = Negotiating Amount = 5200	No
Opportunity EEE is Modified	Amount = 10000	No
Opportunity EEE is Modified	Amount = 4000	No
Opportunity EEE is Modified	<b>Amount = 5400</b>	Yes

**Scenario:** Assign a follow up task to open opportunity's owner 5 days before the closed date

<b>Name of the Workflow</b>	Follow up Task to Opportunity Owner before closed
<b>Object</b>	Opportunity
<b>Evaluation Criteria</b>	Created, and any time it's edited to subsequently meet criteria
<b>Rule Criteria (Filter)</b>	Opportunity Fields: Stage != 'Closed Lost' OR 'Closed Won'
<b>Immediate Actions</b>	None
<b>Time Dependent Action</b>	<b>Time Trigger</b> : 5 Days before the Closed Date <b>Action</b> : Assign the Task <b>Task Assign To:</b> <Choose the owner field of Opportunity> <b>Due Date</b> : 3 Before the Closed Date <b>Subject</b> : Follow up customer <b>Status</b> : High

**For time dependent action**, we need to first Time Trigger (5 Days before the Closed Date) then will have to add action as below before adding the action.

The valid range is **0 to 999** days or hours.

**Then add action "Task Assign"**

**Scenarios to understand the Time-Dependent-Workflow Action**

Example of opportunity workflow rule with time-based workflow action		
<b>Workflow rule name:</b> Big Opportunity <b>Evaluation criteria:</b> Created, and every time it's edited to subsequently meet criteria <b>Rule criteria:</b> Amount > 1000 <b>Time trigger:</b> 5 Days before Close Date <b>Time-based workflow action:</b> Update next step to "Review Amount with VP of Sales"		
Assume current date on which all events occur is 5/16/2019		
Event	Record field values	Time-based workflow queue
1. An Opportunity record is created. The workflow rule's evaluation criteria and rule criteria <b>are not</b> satisfied.	<b>Amount = 500</b> <b>Close date = 5/31/2019</b>	No entries
2. The Amount on the Opportunity record is modified. The workflow rule's evaluation criteria and rule criteria <b>are</b> now satisfied.	<b>Amount = 3300</b> <b>Close date = 5/31/2019</b>	Automatically added entry: <b>Workflow rule name:</b> Big Opportunity <b>Scheduled date:</b> 5/26/2019 12:00 AM
3. The Close Date on the Opportunity record is modified. The workflow rule's evaluation criteria and rule criteria <b>are still</b> satisfied.	<b>Amount = 3300</b> <b>Close date = 6/30/2019</b>	Automatically updated entry: <b>Workflow rule name:</b> Big Opportunity <b>Scheduled date:</b> 6/25/2019 12:00 AM
4. The Close Date on the Opportunity record is modified. The workflow rule's evaluation criteria and rule criteria <b>are still</b> satisfied.	<b>Amount = 3300</b> <b>Close date = 5/18/2019</b>	Automatically updated entry: <b>Workflow rule name:</b> Big Opportunity <b>Scheduled date:</b> 5/13/2019 12:00 AM
5. The Amount on the Opportunity is modified. The workflow rule's evaluation criteria and rule criteria <b>are no longer</b> satisfied.	<b>Amount = 800</b> <b>Close date = 5/18/2019</b>	Entry removed

**Monitor Pending Workflow Actions**

1. From Setup, enter Time-Based Workflow in the Quick Find box, then select **Time-Based Workflow**.
  2. Click **Search** to view only the pending actions that match the criteria. The filter options are:
    - **Workflow Rule Name:** The name of the workflow rule.
    - **Object:** The object that triggered the workflow rule. Enter the object name in the singular form.
    - **Scheduled Date:** The date the pending actions are scheduled to occur.
    - **Create Date:** The date the record that triggered the workflow was created.
    - **Created By:** The user who created the record that triggered the workflow rule.
    - **Record Name:** The name of the record that triggered the workflow rule.
- The filter is not case-sensitive.

**To cancel pending actions:**

1. Select the box next to the pending actions you want to cancel.
2. Click **Delete**.

**About Field Update Action Page**

From Setup, enter Field Updates in the Update box, and select **Field Updates**. Then use these settings to configure your field update.

**To understand the 'Re-evaluation Workflow Rules Field Change' checkbox, consider workflows on Account Object**

Workflow Name	Re-evaluate checkbox	Criteria	Field Update Action	Action (Yes/No)
WF1	Yes	Site = X	Site = A	Yes
WF2	Yes	Site = A	Site = B	Yes
WF3	Yes	Site = B	Site = C	Yes
WF4	Yes	Site = C	Site = D	Yes
WF5	Yes	Site = D	Site = E	Yes
WF6	Yes	Site = E	Site = X	Yes

**WF1 will not fire again since only 5 more workflows will be re-evaluated next to initial update.**

**Also the workflow once run in the cycle will not be run again in the same transaction.**

**Note:** In workflow Field Update, we can update current object fields and its master object fields. If there are objects Department\_\_c (master) and Employee\_\_c in master-detail relationship. If workflow on Employee\_\_c object, then we can update the fields in Employee\_\_c and its parent Department\_\_c fields.

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**Order of Execution:** Field updates occur before email alerts, tasks, and outbound messages.

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