

Workflow Triggers

Workflow Rules (along with Process Builders) are now on a deprecation / End-of-Life plan. Existing Workflow Rules will continue to operate for the foreseeable future, but in the near future (Winter 23) Salesforce will begin to prevent creating new Workflow Rules. Establish a plan to migrate to Flows, and create any new automation using Flow Builder.

These naming convention best practices will remain in place for reference purposes so long as Workflow Rules may exist in a Salesforce org

A workflow trigger **MUST** always be named after what Triggers the workflow, and not the actions. In all cases possible, the number of triggers per object **SHOULD** be limited - reading the existing trigger names allows using existing ones when possible. Knowing that all automations count towards Salesforce allotted CPU time per record, a consultant **SHOULD** consider how to limit the number of workflows in all cases.

1. All Workflow Triggers **MUST** contain a Bypass Rule check.
2. A Workflow Trigger **SHALL** always start by `WF`, followed by a number corresponding to the number of workflows on the triggering Object, followed by an underscore.
3. The Workflow Trigger name **MUST** try to explain in a concise manner what triggers the WF. Note that conciseness trumps clarity for this field.
4. All Workflows Trigger **MUST** have a description detailing how they are triggered.
5. Wherever possible, a Consultant **SHOULD** use operators over functions.

Examples

Object	WF Name	Description	WF Rule
Invoice	WF01_WhenInvoicePaid	This WF triggers when the invoice Status is set to "Paid". Triggered from another automation.	<code>!\$User.BypassWF_c && ISPICKVAL(Status_c, "Paid")</code>
Invoice	WF02_CE_WhenStatusChanges	This WF triggers every time the Status of the invoice is changed.	<code>!\$User.BypassWF_c && ISCHANGED(Status_c)</code>
Contact	WF01_C_IfStreetBlank	This WF triggers on creation if the street is Blank	<code>!\$User.BypassWF_c && ISBLANK(MailingStreet)</code>

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