Activity Settings

Last Modified on 17/04/2019 6:13 pm AEST

When configuring workflow activities, there are various settings that need to be configured for each workflow activity. Depending on the workflow activity and setting being configured, the following are the various options of configuring the workflow settings.

Туре	Description
Select Record	Ability to choose a specific record from a selected object. After choosing "Select Record" option, select "choose object" to choose the object type which will then display all records of the chosen object.
Select Parameter	Ability to choose a parameter to use in the workflow activity. See "Understanding Parameters" below
Calculation	Ability to use a calculation to configure the workflow activity. See Calculations in Workflows
Select Object	Ability to select from any object in the system
Select Fields	Ability to select from a list of fields of a given object
Select Relationship	Ability to select from a list of lookups or relationships of a given object

All workflow activity configurations are in the format of a Parameter or Calculation. Therefore, to type in plain text use single quotes. e.g. 'simple text'.

Understanding Parameters

Parameters are used within workflows to pass information from one activity to another. Workflow activities automatically create parameters as an output of that activity.

As an example, a 'create' activity creates a parameter called '[Activity Name].[record]'. This means that that any subsequent activity can use the '[Activity Name].[record]' parameter to perform further tasks. For example, a user can add a 'create' activity to create a new employee, which is then used by a 'Send Email' activity to send that newly created employee an email.

Every workflow starts with three parameters:

- **Triggering Person** the Person record that triggered the start of the workflow.
- **Triggering Trigger** the trigger that triggered the run.
- **Triggering User** the user account record that triggered the start of the workflow.
- Workflow Owner the assigned user account that is set as the 'owner' of the workflow.