

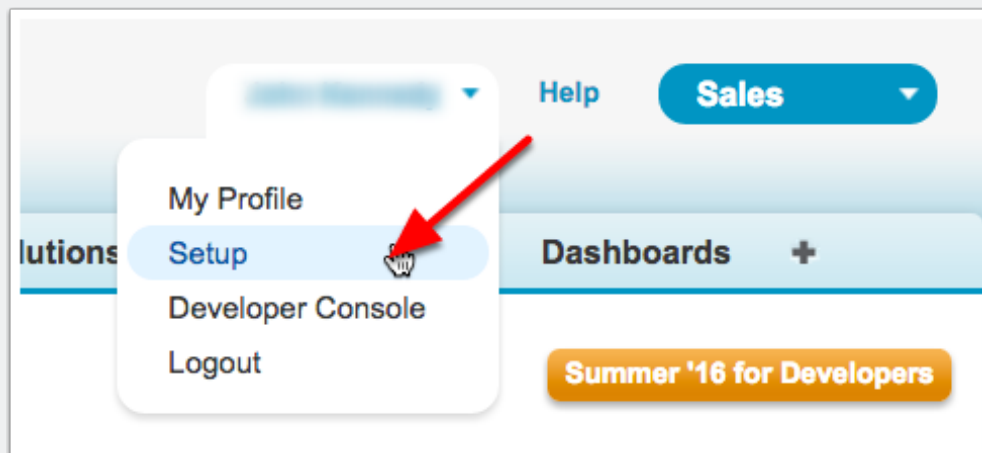
Create a workflow rule to set the Amity Sync field

This article demonstrates how to create a workflow rule that will set the Amity Sync account custom field in Salesforce.

In this case, the workflow rule sets the Amity Sync field to True in the account when any associated opportunity's stage becomes Closed Won.

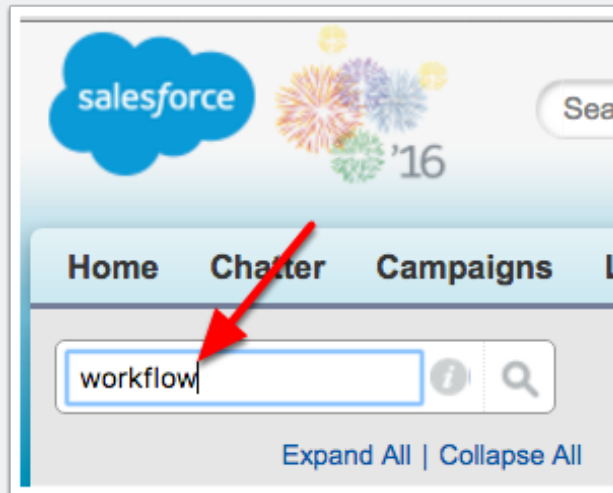
1. Login into Salesforce

2. Click Setup from the user menu.

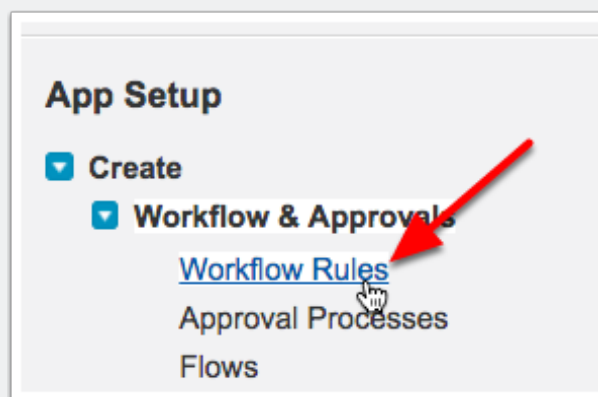


Create a workflow rule to set the Amity Sync field

3. Type "workflow" into the Quick Find field



4. Click the Workflow Rules link in App Setup > Create > Workflow & Approvals



Create a workflow rule to set the Amity Sync field

5. Click the New Rule button

All Workflow Rules Help for this Page ?

Configure your organization's workflow by creating workflow rules. 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 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 can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

Quick Tips

- [Useful Sample Workflow Rules](#)
- [Video Tutorial \(English Only\)](#)
- [Troubleshooting Workflow](#)

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

Action	Rule Name ↑	Description	Object	Active
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6. Select the object in Step 1

1. Select **Opportunity** in the Object picklist.
2. Click the **Next** button.

Step 1: Select object Step 1 of 3

2 Next Cancel

Select the object to which this workflow rule applies.

1 Object

Next Cancel

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7. Configure the workflow rule in Step 2

1. Enter a rule name. For example: **Set Amity Sync account field**
2. Ensure the "Evaluate the rule when a record" value is set to **created, and any time it's edited to subsequently meet criteria**
3. Ensure the "Run this rule if the following" value is set is **criteria are met**
4. Set the Field to **Opportunity:Stage**
5. Set the Operator to **equals**
6. Set the Value to **Closed Won**. If you click on the magnifying glass, a lookup window will appear. You can select Closed Won from the window.
7. Click the **Save & Next** button

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Step 2: Configure Workflow Rule Step 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: Opportunity 1

Rule Name: Set Amity Sync accour 1

Description:

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

2 How do I choose?

Rule Criteria 3

Run this rule if the following :

Field 4	Operator 5	Value 6	
Opportunity: Stage	equals	Closed Won	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	

[Add Filter Logic...](#)

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8. Specify the workflow action in Step 3

1. Click the **Add Workflow Action** button.
2. Click **New Field Update**.

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered

Rule Criteria Opportunity: Stage
Evaluation Criteria Evaluate the rule when e

Immediate Workflow Actions

No workflow actions have been added.

Add Workflow Action ▼

- New Task
- New Email Alert
- New Field Update**
- New Outbound Message
- Select Existing Action
- Add Time Trigger

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9. Complete the Field Update Edit form

1. Enter a name. For example: **Set Amity Sync account field.**
2. Optional: Enter a description.
3. Set the "Field to Update" values to **Account** and **Amity Sync**.
4. Set the "Checkbox Options" to **True**.
5. Click the **Save** button.

The screenshot shows the 'Field Update Edit' form with the following fields and values:

- Name:** Set Amity Sync accour (1)
- Unique Name:** Set_Amity_Sync_accou (1)
- Description:** Set the Amity Sync account field to True (2)
- Object:** Opportunity (3)
- Field to Update:** Account and Amity Sync (3)
- Field Data Type:** Checkbox
- Checkbox Options:** True (4)

Buttons at the top: Save, Save & New, Cancel. Buttons at the bottom: Save, Save & New, Cancel. A legend indicates that a red vertical bar next to a field name means it is required information.

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10. Click the Done button on Step 3


Edit Rule Set Amity Sync account field Help for this Page ?

Step 3: Specify Workflow Actions Step 3 of 3

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria Opportunity: Stage EQUALS Closed Won

Done



11. Click the Activate button to activate the workflow rule.

Workflow Rule Help for this Page ?

Set Amity Sync account field

[« Back to List: Workflow Rules](#)

Workflow Rule Detail

[Edit](#) [Delete](#) [Clone](#) [Activate](#)

Rule Name	Set Amity Sync account field	Object	Opportunity
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	Opportunity: Stage EQUALS Closed Won		

