

## SESSION 20

**The Process Builder** is a drag and drop lightning tool that helps you easily automate your business processes. Process automation feature to automate the below activities

SNO	Action Type	Purpose
1	Create a Record	Create a record by manually entering values or by using the values of related records.
2	Invoke a Process	Invoke a process from another process. With invocable processes, you have the option of reuse so that you don't spend your time on repetitive work.
3	Post to Chatter	Post to the feed of a user, a Chatter group, or the record that started the process.
4	Quick Action	Create a record, update a record, or log a call by using a quick action that you or another admin created for your organization.
5	Flows	Start an autolaunched flow from your process to automate complex business processes. Create flows to perform logic and have events trigger the flows via processes without writing code.
6	Email Alert	Easily send an email from a process by using an email alert. Email alerts are configured outside of the Process Builder and contain the standard text, list of recipients, and template for an email.
7	Send a Custom Notification	Send customized notifications when important events occur. Alert an account owner if a new support case is logged while trying to close a deal, or send a notification for a workflow built entirely with custom objects.
8	Submit record for approval	Submit the record that started the process for approval.
9	Update Records	Update one or more records that are related to the record that started the process by manually entering values or by using the values from related records.
10	Call Apex Code from a Process	Add customized functionality to your process by calling Apex from the process.
11	Quip	Manage the quip documents.

### **Navigation and Details of Options:**

#### **Classic**

Setup -> Build -> Create -> Workflow & Approvals -> Process builder

#### **Lightning**

Setup -> Process Automation Tools -> Process Builder

**Step1: Click on NEW to create new process**

**Step 2: Naming the process**

The process starts when \*

Select One

Select One

A record changes

A platform event message is received

It's invoked by another process

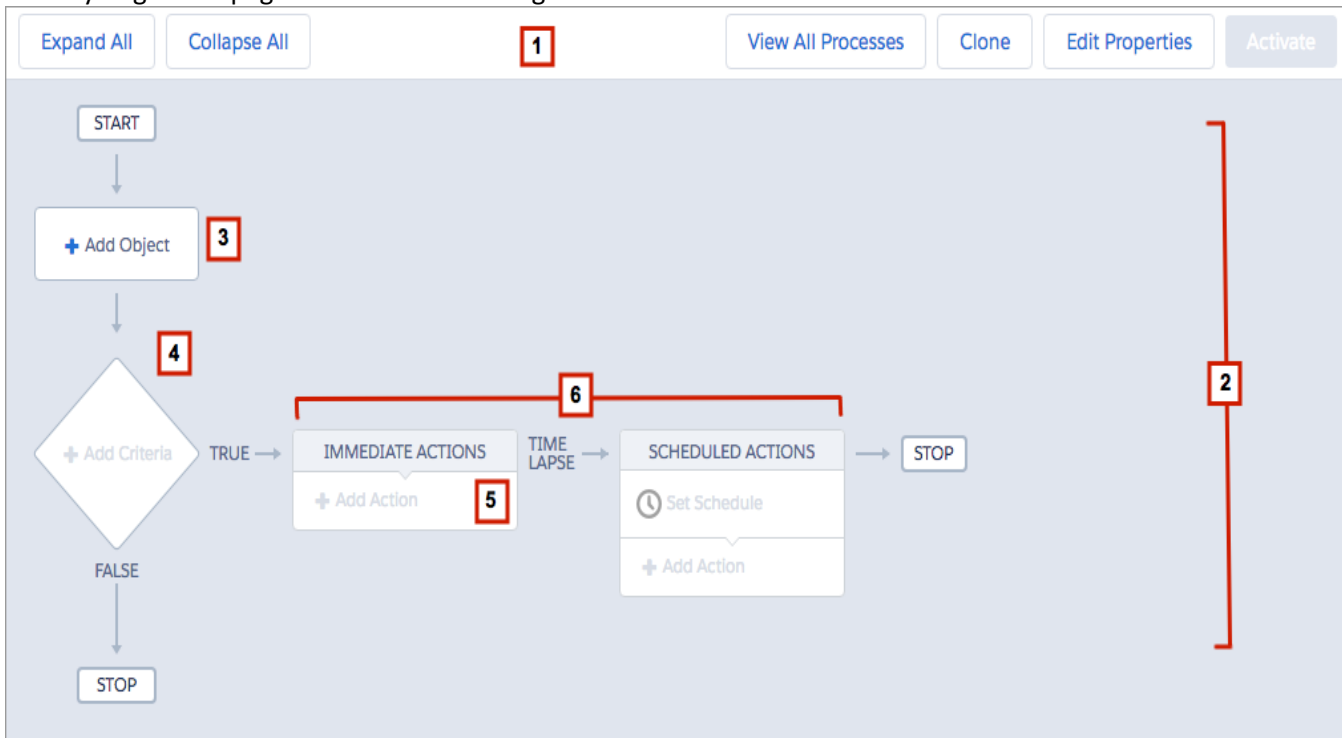
❖ When select a **Record Changes**, the process would fire when we create or modify the record.

❖ When **A platform event message is received** is chosen, the process will fire when the message is received for the defined platform event.

**Note:** Platform events capability is based on event-driven messaging architecture which enables Salesforce to send out information to external system when event occurs or consume event published by external system.

❖ The last one will be **invoked by another process**.

Now you get to a page that looks something like this.



### Button Bar (1)

Use the button bar to:

- Expand or collapse actions on the canvas
- Open the process management page
- Create an inactive copy of the current process
- Edit or view the properties of the current process
- Activate or deactivate the current process

**Canvas (2)** The canvas is the main workspace for a process. On the canvas, you can define: The records that the process should evaluate

- **(3)** You identify the object and specify the changes to that object's records that cause the process to run.
- **(4)** One or more criteria nodes  
Each criteria node includes conditions that are used to evaluate the record. A criteria node evaluates based on filter criteria—such as whether the value for the Amount field is greater than \$1000—or based on a formula. You can also simply execute the associated actions without evaluating the record.
- **(5)** One or more actions  
If the criteria are met for the record that starts the process, the criteria node's associated action group **(6)** either executes **immediately** or according to the **schedule** defined for the action.

**USE CASE: Create a simple process that creates a contract record and a follow-up task when a high-value opportunity is closed and won.**

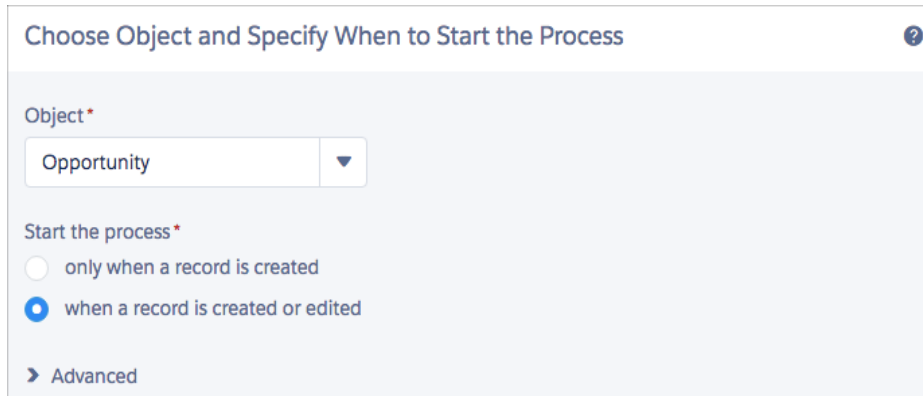
1. From Setup, enter Process Builder in the Quick Find box, click **Process Builder**, and then click **New**.
2. Name the process Opportunity Management. The API name updates to Opportunity Management when you tab out of the Name field.
3. For the description, enter If a high-value opportunity is closed and won, create a draft contract and a follow-up task for the account owner.

4. Click **Save**.

### **STEP 1: Choose the Object**

5. Click **Add Object** to associate your process with an object and specify when to start the process. For this process, let's choose Opportunity and start the process when the record is created or edited.

**Tip** When you're selecting objects or fields, you can type to filter the list of options. For example, type *Opp* and then select *Opportunity* from the filtered list.



Choose Object and Specify When to Start the Process

Object \*

Opportunity

Start the process \*

only when a record is created

when a record is created or edited

> Advanced

6. Click **Save**.

### **STEP 2: ADD CRITERIA**

Define the criteria that must be true before the process can execute the associated actions. For this process, we want to check whether the opportunity has been closed and won, as well as if it's high-value. For this example, "high-value" means it's worth more than \$250,000.

1. Click **Add Criteria** and Name the criteria "Opportunity Won".
2. Leave **Conditions are met** selected to evaluate specified field values for the opportunity record.
3. Set the first filter condition. The process needs to check whether the opportunity has been closed and won.
  - a. Click in the Field box **(1)**, choose **Opportunity > Stage**, and click **Choose**.
  - b. For the operator **(2)**, leave **Equals** selected and For the type **(3)**, leave **Picklist** selected.
  - c. For the value **(4)**, select **Closed Won**.
4. Set the second filter condition. The process needs to check whether the opportunity is high-value.
  - a. Click **Add Row (5)**. Then click in the Field box, select **Opportunity > Amount**, and then click **Choose**.
  - b. For the operator, select **Greater than**, then For the type, leave **Currency** selected and enter \$250,000.00.

Define Criteria for this Action Group

Criteria Name \* ⓘ  
Opportunity Won

Criteria for Executing Actions \*

Conditions are met  
 Formula evaluates to true  
 No criteria—just execute the actions!

Set Conditions

	Field *	Operator *	Type *	Value *	
1	[Opportunity...]	1 Equals	2 Picklist	3 Closed Won	4
2	[Opportunity...]	Greater than	Currency	250,000.00	
+ Add Row 5					

Conditions \*

All of the conditions are met (AND)  
 Any of the conditions are met (OR)  
 Customize the logic

Advanced

Do you want to execute the actions only when specified changes are made to the record? ⓘ  
 Yes

- In the Conditions area, leave **All of the conditions are met (AND)** selected. This field lets you specify which combination of the filter conditions must be true for the process to execute the associated actions.
- Click **Advanced** and select **Yes (6)**. When you select this option, the process ignores record changes that aren't relevant to your defined criteria. For example, if a user edits the record by adding a description, the process won't execute the associated actions.

**Note: This setting isn't available if:**

- Your process starts only when a record is created.
- Your process starts when a record is created or edited and the criteria node doesn't evaluate any criteria.
- The criteria node evaluates a formula, but the formula doesn't include a reference to the record that started the process.
- Your process uses the **IS CHANGED** operator in a filter condition.

Click **Save**.

**STEP 3: ADD ACTIONS**

**3(a) Action is to create a contract.**

Now let's define the actions that execute when the criteria are met. When an opportunity is closed and won and the amount is greater than \$250,000, the process creates a draft contract record associated with the opportunity's account and a follow-up task for the associated account's owner.

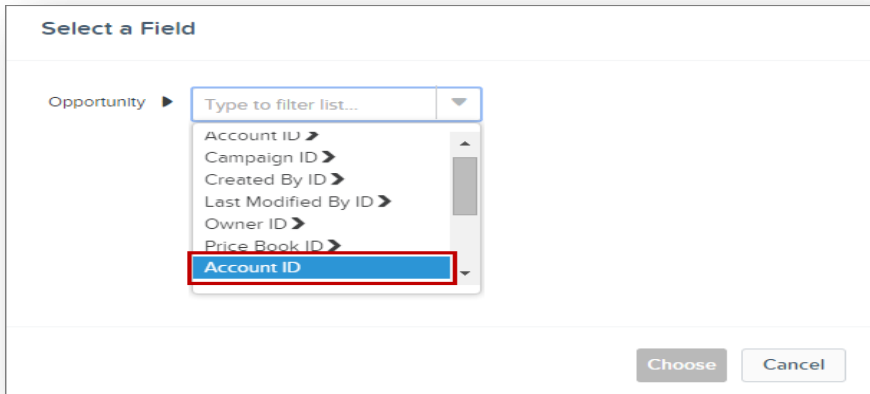
First up, let's **create a contract**.

- Under Immediate Actions, click **Add Action**.
- For the action type, select **Create a Record**.
- Name the action Create Draft Contract.
- For Record Type, select **Contract**.

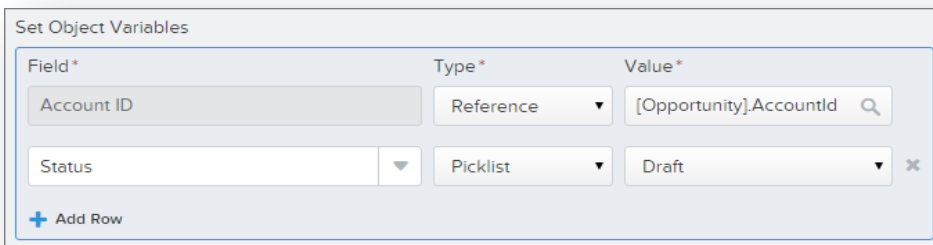
Certain fields are required when you create a record. When you select the object that you want to create a record for, the Process Builder automatically displays rows for each of that record's required fields. When you select Contract, a row for Account ID shows automatically.

- Associate the new contract with the opportunity's parent account by selecting a value for Account ID.

- a) For type, select **Reference**.
- b) Click in the Value box to choose a value.
- c) Select **Opportunity > Account ID** and then click **Choose**.



6. Make sure the new contract is a draft. In the Value for Status, select **Draft** from the drop-down list



7. Click **Save**.

**3(b) Create a high priority follow-up task** for the associated account's owner. We'll use a schedule so the owner can follow up with the account six days after the opportunity closes.

First, set up a schedule. A schedule lets the process know that it must wait to execute the associated actions.

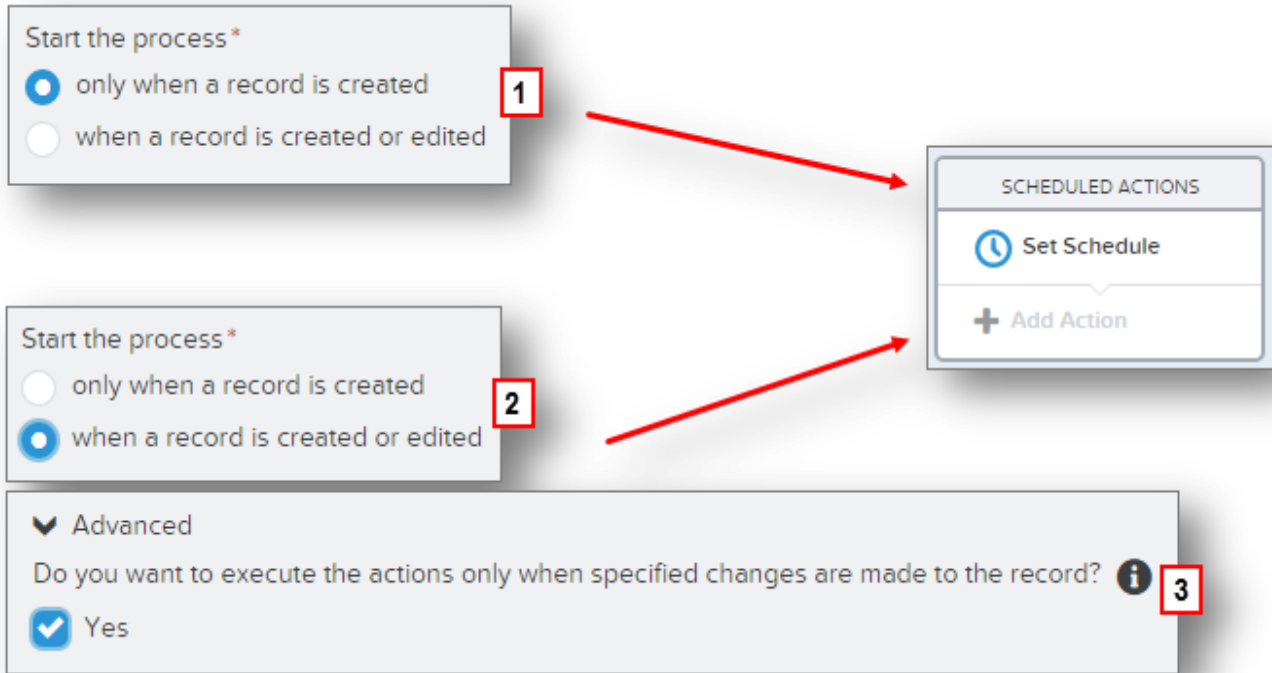
Because you can configure multiple schedules for the same criteria node, each schedule has its own list of actions to execute.

Note:

To add **scheduled actions** to your process, you have two options:

- Start the process only when a record is created

- Start the process **when a record is created or edited**. In addition, select the advanced option to execute actions only when specified changes are made.



1. Under Scheduled Actions, click **Set Schedule**.
2. Set the schedule for six days after the opportunity closes.
3. Click **Save**.

Now that you have a schedule, add the task creation action to it with values for task fields.

**Assigned to ID:** Opportunity > Account ID > Owner ID

**Priority:** High

**Status:** Not Started

PER-ORG LIMIT	ESSENTIALS OR PROFESSIONAL EDITION	ENTERPRISE, UNLIMITED, PERFORMANCE, OR DEVELOPER EDITION
Active record change processes and rules per object	50	50
Rules include workflow rules, escalation rules, assignment rules, and auto-assignment rules.		
<b>Total processes</b>	5 per process type	4,000 per process type
<b>Active processes</b>	5 per process type	2,000 per process type
<b>Criteria nodes that are evaluated and actions that are executed at runtime per process</b>	2,000	2,000

**NOTE:** Refer the videos for examples on other actions and Admin Exercise Document.