

Salesforce Certified Admin and App Builder

Lesson 15—Visual Workflow, Process Builder, and Schema Builder



What You'll Learn

- Creating a flow
- Modifying an existing flow
- Creating a process in the process builder
- Creating fields in the schema builder

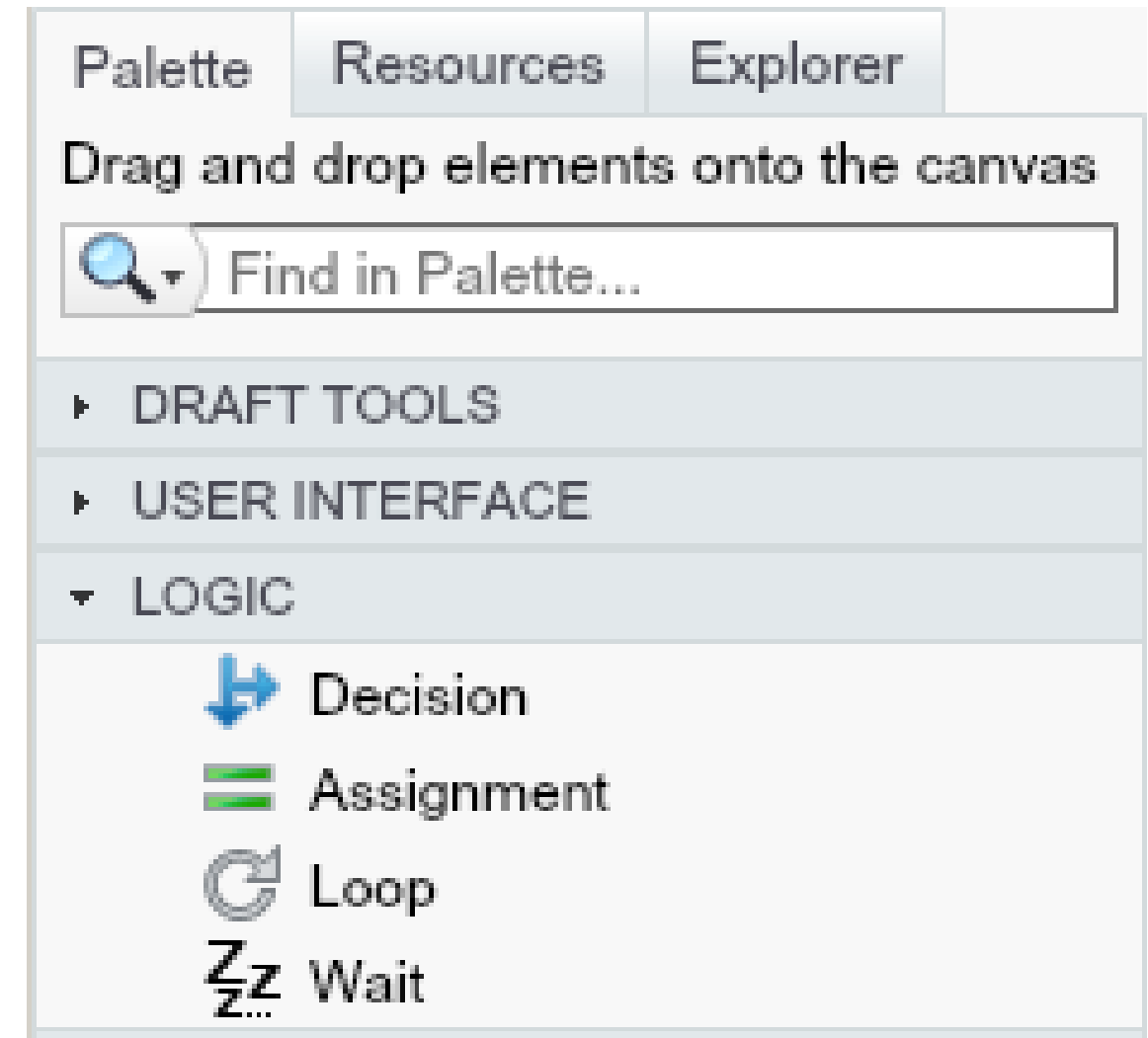


Creating a Visual Flow

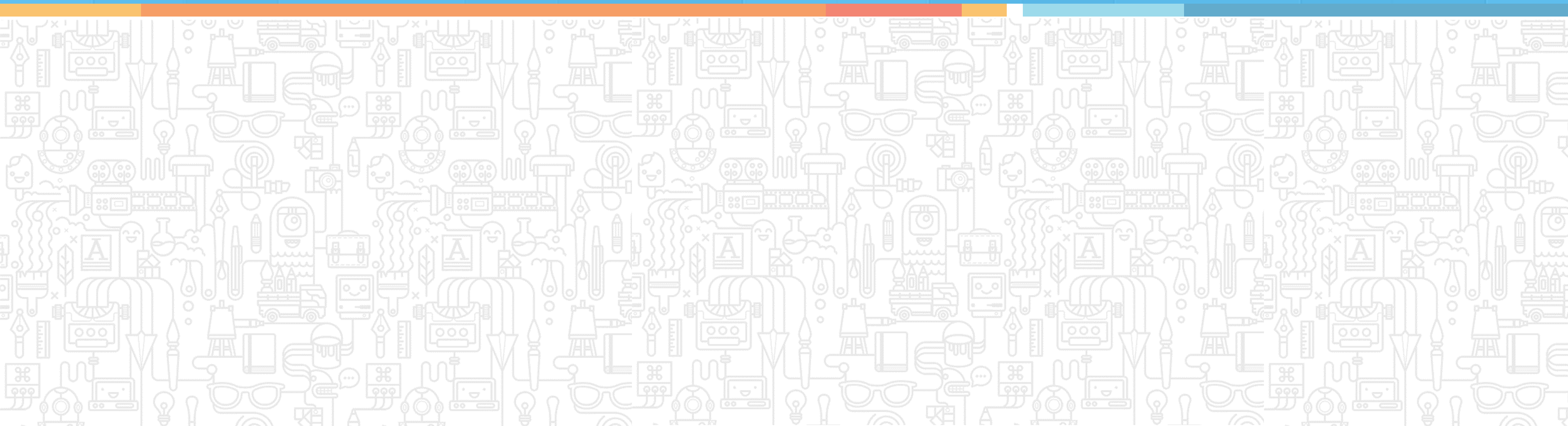


Remember the following points when using the flow designer:

- The flow designer can be used to create, update, lookup, or delete records.
- It can be used to implement logic for decisions and assignments.
- You can create Quick Actions such as new lead and new account.
- You can create variables, formulas, and templates, in the resource area.



Modifying Existing Flows



Keep in mind the following points:

- Not all components of an existing flow can be modified while the flow is active.
- Creating a new flow through cloning can be useful.
- Existing flows can trigger tasks and emails when being modified.

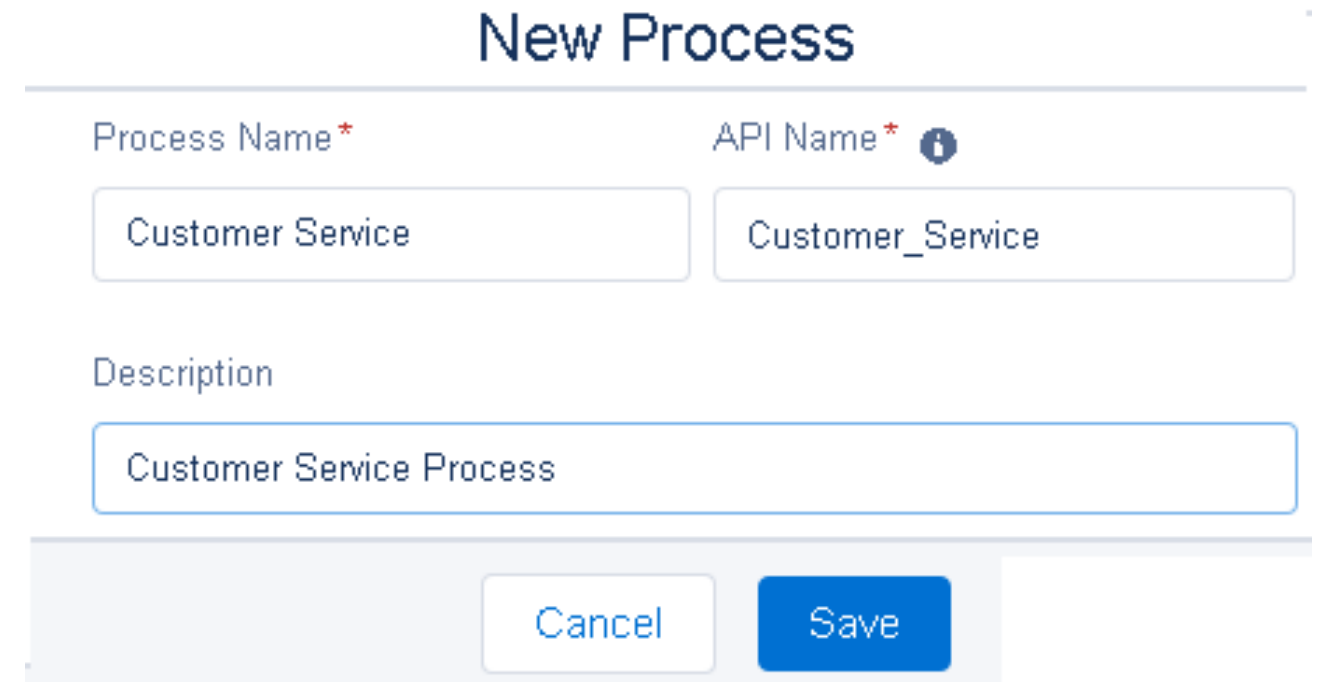


Creating a Process in the Process Builder



Keep in mind the following points about the Process Builder:

- Creates an automated series of steps using a flowchart.
- Starts by selecting an object and adding criteria.
- Creates immediate actions or scheduled actions.



New Process

Process Name * API Name * ⓘ

Customer Service Customer_Service

Description

Customer Service Process

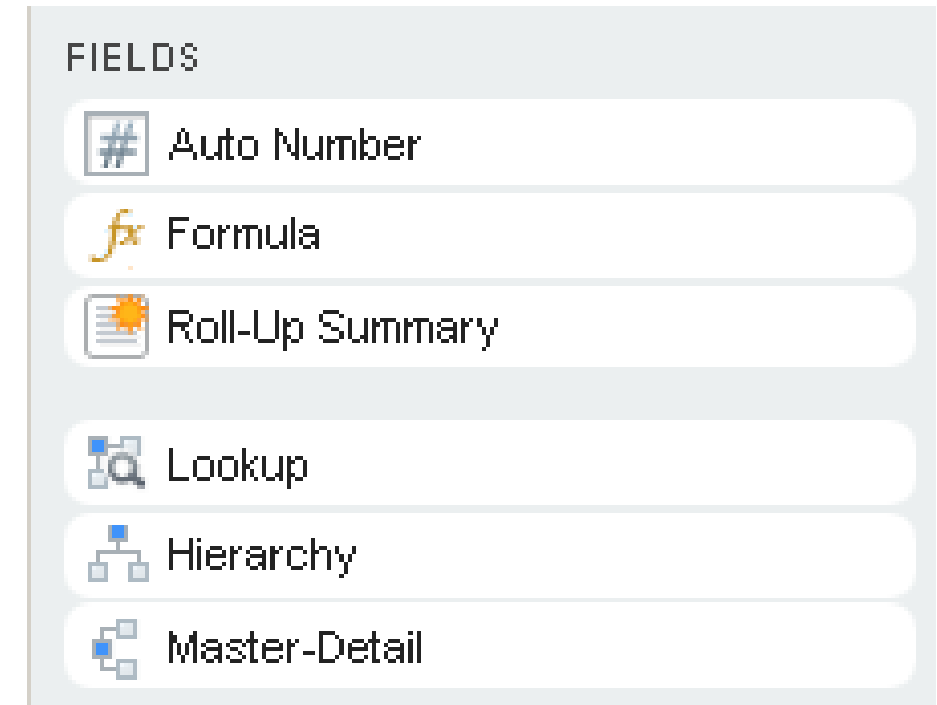
Cancel Save

Creating Fields in the Schema Builder



Remember the following about creating fields in the schema builder:

- Schema builder allows for fast creation of objects and fields.
- Once fields are created you need to add them to relevant profiles and page layouts.
- Certain fields such as master-detail fields can't be created through the schema builder.





QUIZ 1

Which of the following is used to create fields and objects?

- a. Schema Builder
- b. Flow Designer
- c. Process Builder
- d. Apex Code



QUIZ 1

Which of the following is used to create fields and objects?

- a. Schema Builder
- b. Flow Designer
- c. Process Builder
- d. Apex Code



The correct answer is **a**.

The schema builder is used for creating fields and objects in Salesforce.

QUIZ 2

What can be used to automate a process?

- a. Process Builder
- b. Validation Rules
- c. Schema Builder
- d. Custom Fields



QUIZ 2

What can be used to automate a process?

- a. Process Builder
- b. Validation Rules
- c. Schema Builder
- d. Custom Fields



The correct answer is **a**.

The purpose of the process builder is to automate processes such as record creations and record updates.

QUIZ 3

Which tool can be used to create objects?

- a. Flow Designer
- b. Process Builder
- c. Schema Builder
- d. Apex Code



QUIZ 3

Which tool can be used to create objects?

- a. Flow Designer
- b. Process Builder
- c. Schema Builder
- d. Apex Code



The correct answer is **c**.

Objects can only be created in the schema builder.

QUIZ 4

How is the Schema Builder accessed?

- a. Setup> Administer
- b. Setup> Build
- c. Setup> Deploy
- d. Setup> Monitor



QUIZ 4

How is the Schema Builder accessed?

- a. Setup> Administer
- b. Setup> Build
- c. Setup> Deploy
- d. Setup> Monitor



The correct answer is **b**.

The schema builder is accessed under the Build sub-menu.

QUIZ 5

For which scenario is the Process Builder most suitable?

- a. A new contact is created and a document is created automatically
- b. A report is created and scheduled for group sending
- c. A new required field is added to the page layout
- d. Lead is created, email is sent, follow-up task created



QUIZ 5

For which scenario is the Process Builder most suitable?

- a. A new contact is created and a document is created automatically
- b. A report is created and scheduled for group sending
- c. A new required field is added to the page layout
- d. Lead is created, email is sent, follow-up task created



The correct answer is **d**.

The Process Builder is perfect for multi-step actions that take place from one main event.



Case Study

Scenario

Analysis

Solution

United Containers wants to automate the customer service process, but does not have a developer available. United Containers searches for a developer but finds the timeframes submitted by outside developers for completing the process are too long. They need a way to automatically have cases created, tasks assigned, and additional case records created for duplicate issues.

*Click **Analysis** to know the team's next move.*

Scenario

Analysis

Solution

United Containers decided to use the process builder for the following reasons:

1. The process builder allows changes in your browser.
2. The process builder can automate processes on most major objects.
3. The timeframe to complete the automated process was performed in less than one day.

*Click **Solution** to know the company's decision.*

Scenario

Analysis

Solution

System Administrator of United Containers took the following steps to create a process:

1. Navigated to Setup> Workflow & Approvals> Process Builder.
2. The Case object was selected as the primary object in this process.
3. Criteria was added to determine whether a follow-up task should be created.
4. The process was saved and activated.

Proceed forward to view the demo.

Key Takeaways

- Schema Builder offers rapid data model changes.
- Process Builder allows for automated actions without code.
- Flow Designer can automate steps without code.



This concludes 'Visual Workflow, Process Builder, and Schema Builder.'

The next Lesson is 'Validation Rules.'