



SetupHomeObject Manager

Q Search Setup

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with Process Builder—and more! Salesforce plans to retire Process Builder and recommends building automation in Flow Builder.

To Flow Builder | Use Migrate to Flow Tool

Process Builder - Opportunity

Expand AllCollapse All

View All ProcessesCloneView PropertiesDeactivateRead Only

START

Opportunity

Stage equal Proposal/Price Quote

TRUE

IMMEDIATE ACTIONS

Send email to sales ...

STOP

FALSE

Closed won

TRUE

IMMEDIATE ACTIONS

Task

STOP

FALSE

Define Criteria for this Action Group

Criteria Name \*

Stage equal Proposal/Price Quote

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 | Stage | Equals | Picklist | Proposal/Price Quote

Conditions \*

All of the conditions are met (AND)

Any of the conditions are met (OR)

Customize the logic

Advanced

SetupHomeObject Manager

Q Search Setup

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with Process Builder—and more! Salesforce plans to retire Process Builder and recommends building automation in Flow Builder.

To Flow Builder | Use Migrate to Flow Tool

Process Builder - Opportunity

Expand AllCollapse All

View All ProcessesCloneView PropertiesDeactivateRead Only

START

Opportunity

Stage equal Proposal/Price Quote

TRUE

IMMEDIATE ACTIONS

Send email to sales ...

STOP

FALSE

Closed won

TRUE

IMMEDIATE ACTIONS

Task

STOP

FALSE

Define Criteria for this Action Group

Criteria Name \*

Closed 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 | Stage | Equals | Picklist | Closed Won

Conditions \*

All of the conditions are met (AND)

Any of the conditions are met (OR)

Customize the logic

Advanced

Vehicle Manage...

AccountsContactsOpportunitiesDriversTravelersVehiclesReportsDashboards

Welcome

Tasks

Recently Viewed

1 item • Updated a few seconds ago

Search this list...

Recently Viewed

[No subject]

Task

[No subject]

Mark CompleteEdit CommentsChange DateCreate Follow-Up Task

NameRelated To

Details

Related

Assigned To

Prem Desale

Subject

Due Date

Priority

Normal

Created By

Prem Desale, 3/13/2025, 8:51 AM

Comments

Status

Not Started

Name

Related To

Last Modified By

Prem Desale, 3/13/2025, 8:51 AM