

# Process Builder Conventions

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All Naming Conventions Are [RFC 2119](#) and [RFC 6919](#) compliant.

## General Conventions

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1. If there are APEX triggers firing on an object, Process Builder **SHOULD NOT** be used. \11\*
2. If Process Builders existed before building the APEX triggers, the Process Builders **SHOULD** be replaced by APEX triggers and classes.
3. Process Builders **REALLY SHOULD NOT** fire on, update, or otherwise reference, Person Accounts.
4. Process Builders **REALLY SHOULD NOT** perform complex operations on records that can be massively inserted/updated as a routine part of organization usage.
5. Process Builders **MUST NOT** call a Flow if firing on an object that can be massively inserted/updated as a routine part of organization usage.
6. Process Builders execution **SHOULD** be limited to the exact cases where they are needed. \12\*. In all cases, a consultant **SHOULD** limit the number of process builders executing on an object.

## Structural Conventions

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1. Generally, a consultant **SHOULD** build Invocable Process Builders, and Invoke them from one single Process on the triggering Object. This is by opposition to creating one process builder by task.
2. Process Builders generally **SHOULD NOT** use the "no criteria" option of the Decision Diamonds.
3. Whenever possible, multiple Process Builders on an object should be migrated to a single Process Builder, with different actions evaluated one after the other.

## Naming Conventions

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1. A Process Builder **SHALL** always start by `PB`, followed by a number corresponding to the number of process builders in the Organization, followed by an underscore.
2. A Process Builder **SHOULD** contain either `C`, `CE`, or `CES` wrapped by underscores, to show if the Workflow triggers on Creation, Creation and Edition, or Subsequent Modifications that Fill Criteria. The default assumed setting is `CE` if none is written. \13\*
3. In case the Process Builder invokes other processes, the Process Builder name **MUST** contain `Inv` wrapped by underscore, and try to explain in a concise manner what triggers the PB.
4. In case the Process Builder Carries out actions independently, the Process Builder name **MUST** try to explain in a concise manner what actions are carried out in the PB.
5. All Process Builder Triggers **MUST** have a description detailing their purpose.
6. A Process Builder Decision Diamond **SHALL** be named after the criteria that are used in the most precise manner possible.
7. A Process Builder Action **SHALL** be named after the action being carried out in the most precise manner possible.

Type	Name	Description
Process Builder	PB01_CE_Inv_Opportunity	This Process Builder invokes all invocable Opportunity Process builders
Process Builder	PB01_UpdateOpportunityAccount	Invocable. Sets the account based on defined rules via a Flow.
Decision Diamond	Status is "Approved"	#N/A
Action	Sets Contact Scoring to 10	#N/A

11 This is a best practice, but it should be noted that for smaller organizations, triggers and process builders may coexist on the same objects.\* 12 Note that contrary to Workflows and Validation Rules, you cannot add a bypass to a Process Builders, as you cannot target User fields on decisions. As such, limiting the scope of execution of the process builder is paramount.\* 13 This is the default setting for Process Builders. To activate CES, one must click on "advanced" on the Decision diamond.\*