

Process Builder

Lesson 17: Process Builder

salesforce

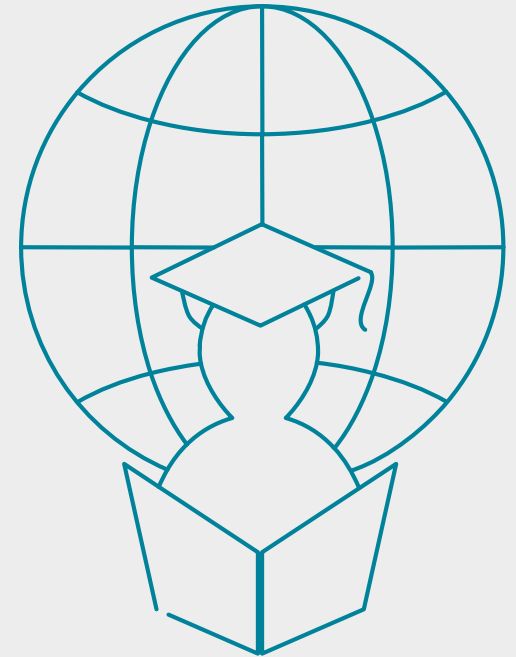
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Lesson Objectives

By the end of this lesson, you will be able to:

- Tool that lets you automate business processes
- Process Builder is a workflow tool
- Processes components



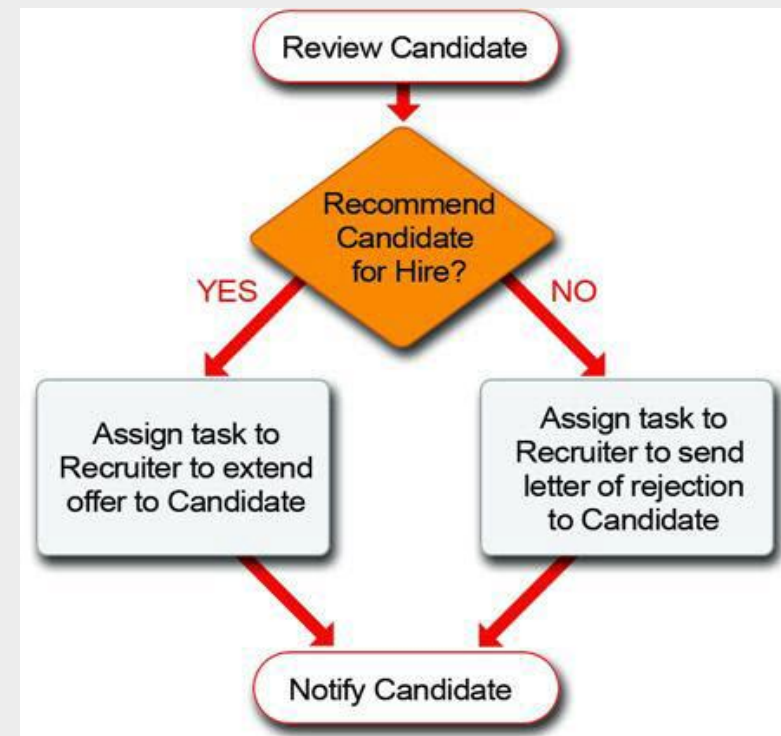
17.1: Process Builder

Process Builder

It is a tool that lets you automate business processes using a convenient graphical representation of your process as you build it

Automated processes consists of:

- Criteria that determine when to execute action groups
- Immediate and scheduled actions to execute when those criteria are met

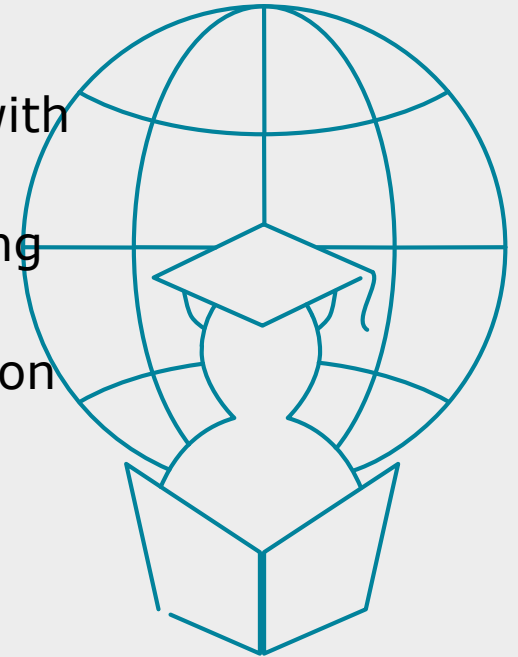


17.1: Process Builder

Process Builder

The Process Builder is a workflow tool that helps you easily automate your business processes. Process Builder provides a user-friendly graphical representation of your process as you build it. With the Process Builder, you can:

- Create your processes using a convenient layout with point-and-click efficiency
- Design entire process in one place rather than using multiple workflow rules
- Collaborate with different teams in your organization to create processes
- Stop using Apex code to automate simple tasks



17.1: Process Builder

Process Builder

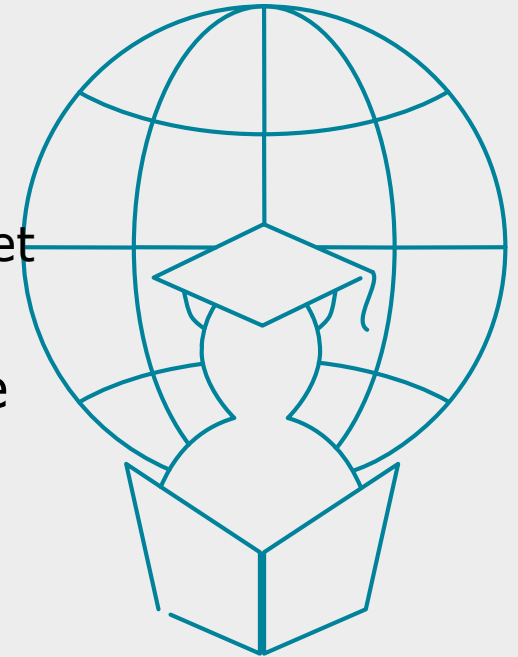
Automated processes in Process Builder are based on records

You can also create processes that invoke other processes

Processes consist of:

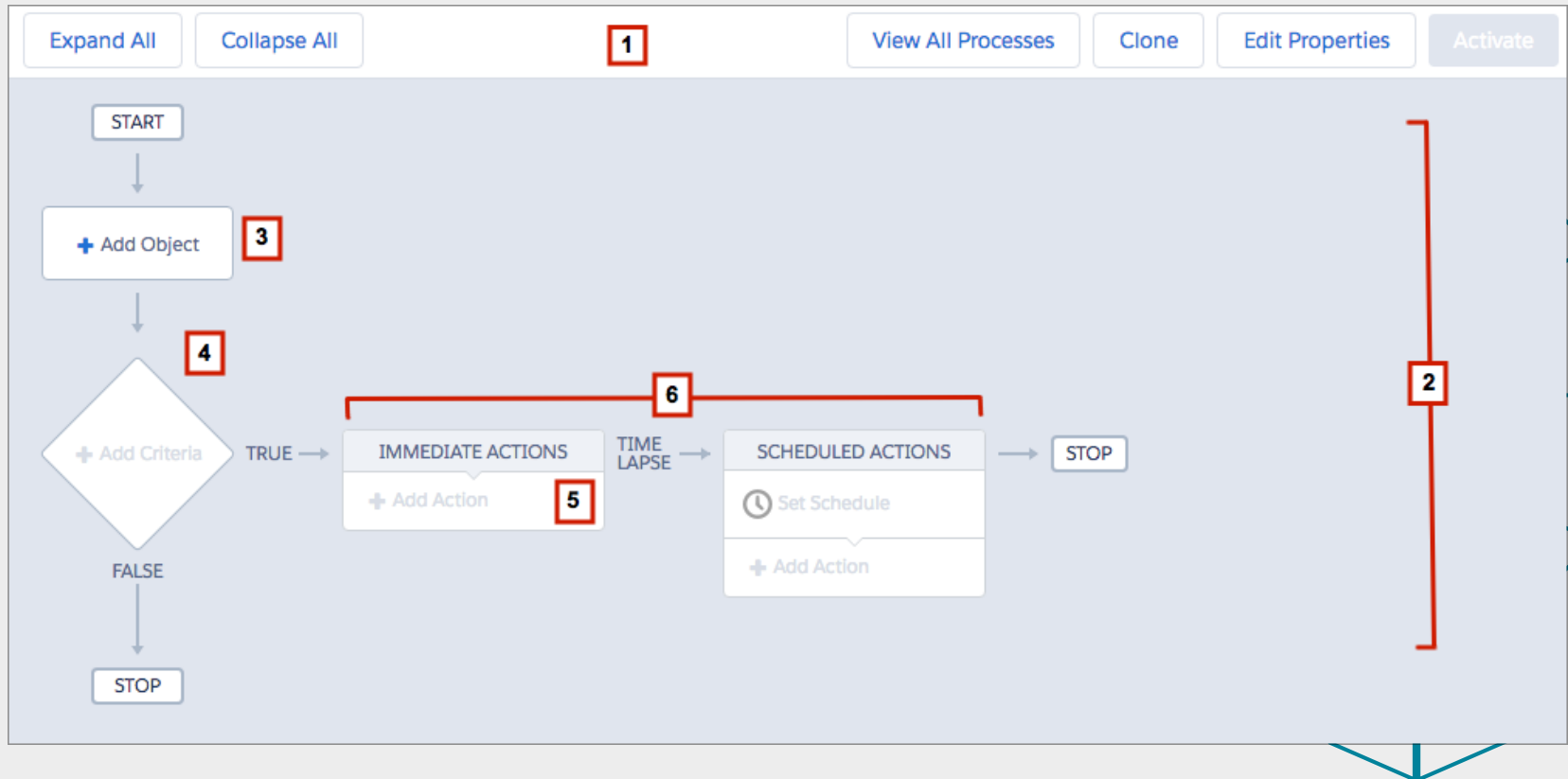
- Criteria that determine when to execute action groups
- Immediate actions to execute when criteria are met
- Scheduled action to execute when criteria are met

Any changes that causes a record to match the criteria automatically triggers the action group



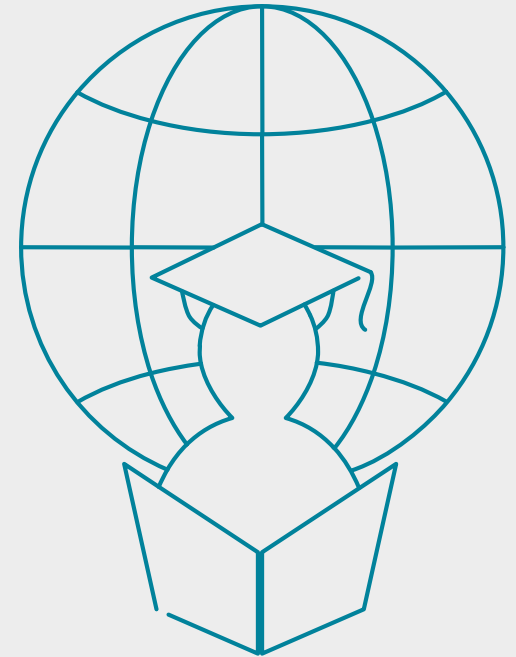
17.2: Process Builder Process Builder UI

Select Process Builder from Setup and create a new process, you will get following page:



33.2: Process Builder Process Builder UI

1. Button bar
2. Canvas
3. Records that the process should evaluate
4. One or more criteria nodes
5. One or more actions
6. the criteria node's associated action group



33.3: Process Builder

Workflow vs Process Builder

Workflow:

- Workflow is business logic that evaluates records as they are created and updated and determines if an automated action needs to occur. In a way it allows records to speak up or do something – update data, notify people or external systems.

Process Builder:

- The Lightning Process Builder is a new workflow tool that helps you easily automate your business processes by providing a powerful and user-friendly visual representation of your process as you build it. Instead of doing this repetitive work manually, you can configure processes to do it automatically. The Process Builder's simple and powerful design allows you to automate processes.

Flow

- Visual Workflow lets you automate business processes by building flows and distributing them to the right users or systems. A flow is an application that can execute logic, interact with the Salesforce database, call Apex classes, and collect data from users. You can build flows by using the Cloud Flow Designer.

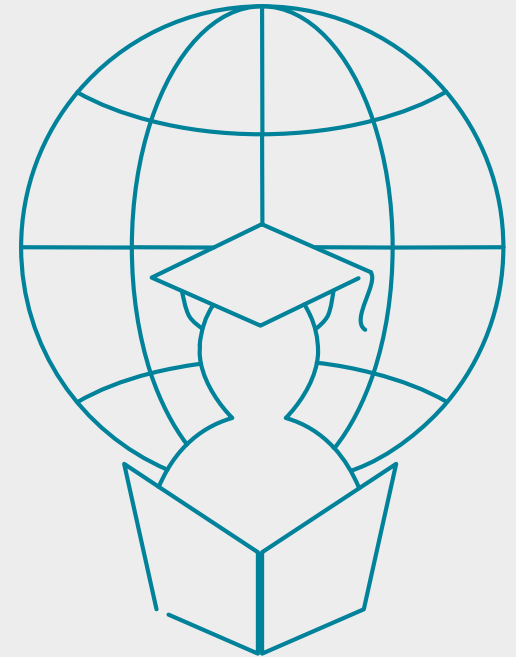
Summary

Process Builder is a tool that helps automate a business process

Automated process has:

- Criteria
- Immediate and scheduled action

Use Process Builder UI



Q1: What is the difference between Workflow and Process builder?

Q2: What can you do with a Process Builder?