

Session 8

Process Builder:

- Process Builder is a Graphical Representational Tool, which is used to Automate certain actions inside the Organization.
- Instead of performing the operations manually, we can automate certain actions by using Process Builder.
- It provides the Point and Click options to Automate the actions.
- Process Builder is having more Additional Actions than Workflow Rules. Hence it is an Extension for the Workflow Rules.
- We can perform the below actions through Process Builder.

1. By using Process Builder, we can Send an Email Notification to the required people based on the email id, by using a Pre-Existing Email Template. (i.e. Outbound Emails)

1.1 We can fire the Actions Immediately and Time-Dependant also.

2. By using Process Builder We can Create a New Record inside the object.

3. By using Process Builder, we can Assign a New Task to the User.

4. By using Process Builder, We can update the Records.

4.1. We can update the Records from Parent Object to Child Object, which may be associated with any relation type.

4.2. We can update the Records from Child Object to Parent Object, which may be associated with any relation type.

5. By using Process Builder, We can invoke an Apex Class (Trigger the Apex Code)

6. By using Process Builder, we can Post a Chatter Feed.

7. By using Process Builder, We can Submit a Record for Approval.

8. By using Process Builder, we can Implement the Chaining Process between the Processes. (i.e. One Process can invoke the another Process)

9. By using Process Builder, we can Add the Quick Actions on the Record Detail Page.

10. By using Process builder we can use Quip tool.

11. By using Process builder we can Launch a Flow

It launches a flow from your process to automate complex business processes- creates flows to perform logic

and enables events trigger the flows via processes- without writing code.

Navigation:

Setup --> Build --> Create --> Workflow & Approval --> Process Builder.

Use Case 1:

Create a New Process on the Account Object:

You first create a process and then select the object on which the process runs. You also make sure the process kicks off whenever a record is edited, because you're going to change the business address in a moment.

1. select **Setup**. This launches Setup in a new tab.
2. From Setup, enter Builder in the Quick Find box, and select **Process Builder**.
3. Click **New**.
4. For Process Name, type Contact address change.
5. For The process starts when, select **A record changes**, and click **Save**.
6. Click + **Add Object**.
7. In the right window, select **Account** from the Object drop-down list.

8. For **Start the process** select **when a record is created or edited**.

9. Click **Save**.

Add Process Criteria

Create Criteria

You now define the criteria that determine when this process runs.

1. Click **Add Criteria**.

2. For Criteria Name, type Address Change.

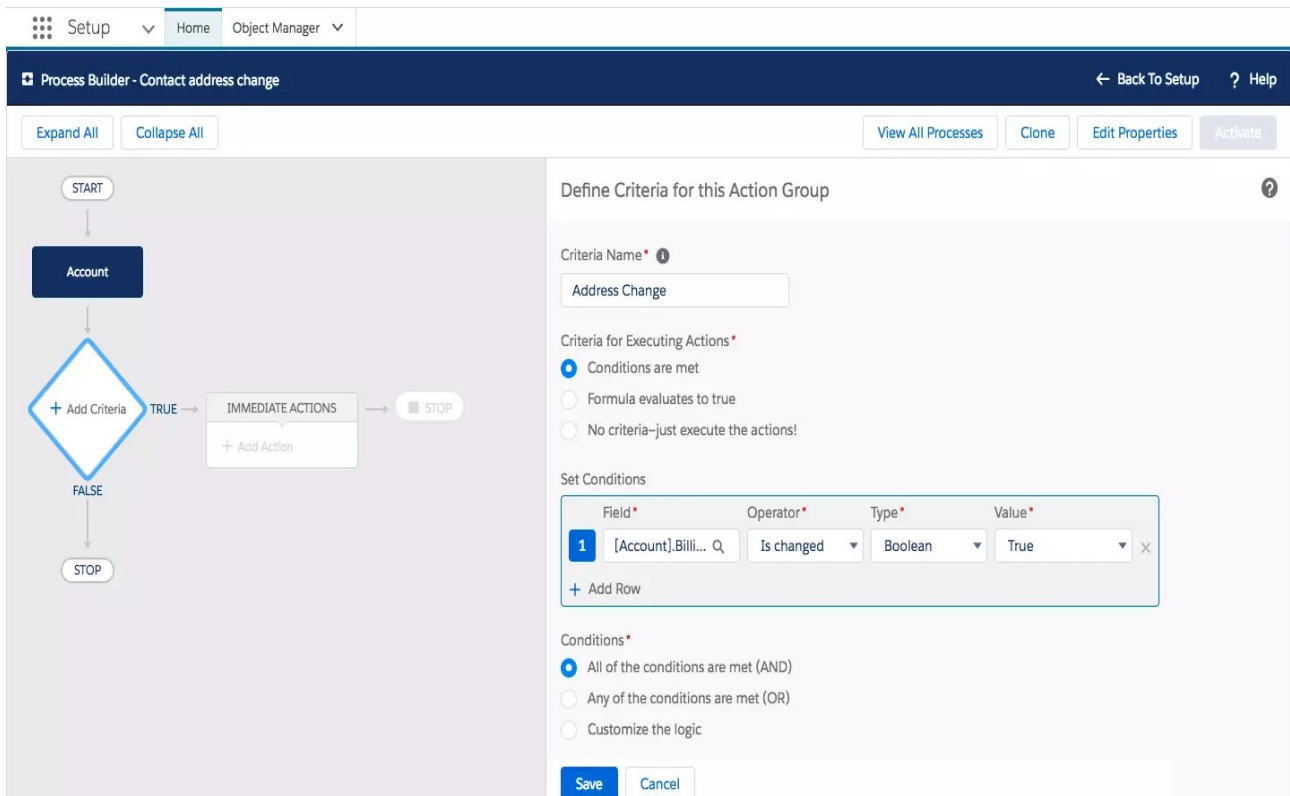
3. For **Criteria for Executing Actions**, keep it set to **Conditions are met**.

4. For Set Filter Conditions, click **Find a field...**, select **Billing Street** and click **Choose**.

5. Set Operator to **Is Changed**, and set Value to **True**.

6. For **Conditions**, keep it set to **All of the conditions are met (AND)**.

7. Click **Save**.



Add Your Process Action

Create an Action

In this step you define what happens when the Billing Street changes.

1. Under the Immediate Actions box, click+ **Add Action**.
2. In the Action Type drop-down list, select **Update Records**.
3. For Action Name, type Update Contact Addresses.
4. For Record Type, click the radio button next to **Select a record related to the Account**, then scroll down and select **Contacts**, and click **Choose**.
5. For **Criteria for Updating Records**, keep it set at **No criteria—just update the records!**.

6. Under **Set new field values for the records you update**, click **Find a field...**, and then scroll down and select **Mailing Street**.
7. Select **Field Reference** for the **Type**.
8. For **Value**, select **Billing Street** as the Account field and click **Choose**.
9. Click **Save**.
10. Click **Activate** and then click **Confirm**.

The screenshot displays the Salesforce Process Builder interface for a process named "Contact address change". The process flow is as follows:

- START** leads to the **Account** object.
- A decision diamond labeled **Address Change** follows. If the condition is **TRUE**, the process proceeds to **IMMEDIATE ACTIONS** and then **STOP**. If **FALSE**, it proceeds to **Add Criteria**.
- From **Add Criteria**, another decision diamond is shown. If **TRUE**, it proceeds to **IMMEDIATE ACTIONS** and then **STOP**. If **FALSE**, it proceeds to **STOP**.

The right-hand panel, titled "Select and Define Action", is configured for the **Update Records** action type. The action name is "Update Contact Addresses". The record type is "[Account].Contacts". The criteria for updating records is set to "No criteria—just update the records!".

Below the criteria, the "Set new field values for the records you update" section contains a table with the following configuration:

Field *	Type *	Value *
Mailing Street	Field Reference	[Account].BillingStreet

The table includes a "+ Add Row" button and "Save" and "Cancel" buttons at the bottom.

Once you activate the process, test it with Account object.

Use Case 2:

Configure a Process on the Hiring Manager Object, to Notify (Email alert) the Hiring Manager Person upon Creating a New Hiring Manager Record inside the object.

Step 1: Create an Email Template with the required "Email Subject" and "Email Content."

Step 2: Create an Email Alert, by giving the required Detail.

Step 3: Create a Process by using Process Builder, to fire the Action to send the email notifications.