

Record Type

Many forms of page using record type

Record Types let you offer different business processes, picklist values, and Page Layouts to different users

Why ?

- We can achieve the same using page layouts !!!
- Why do I need a record type ???



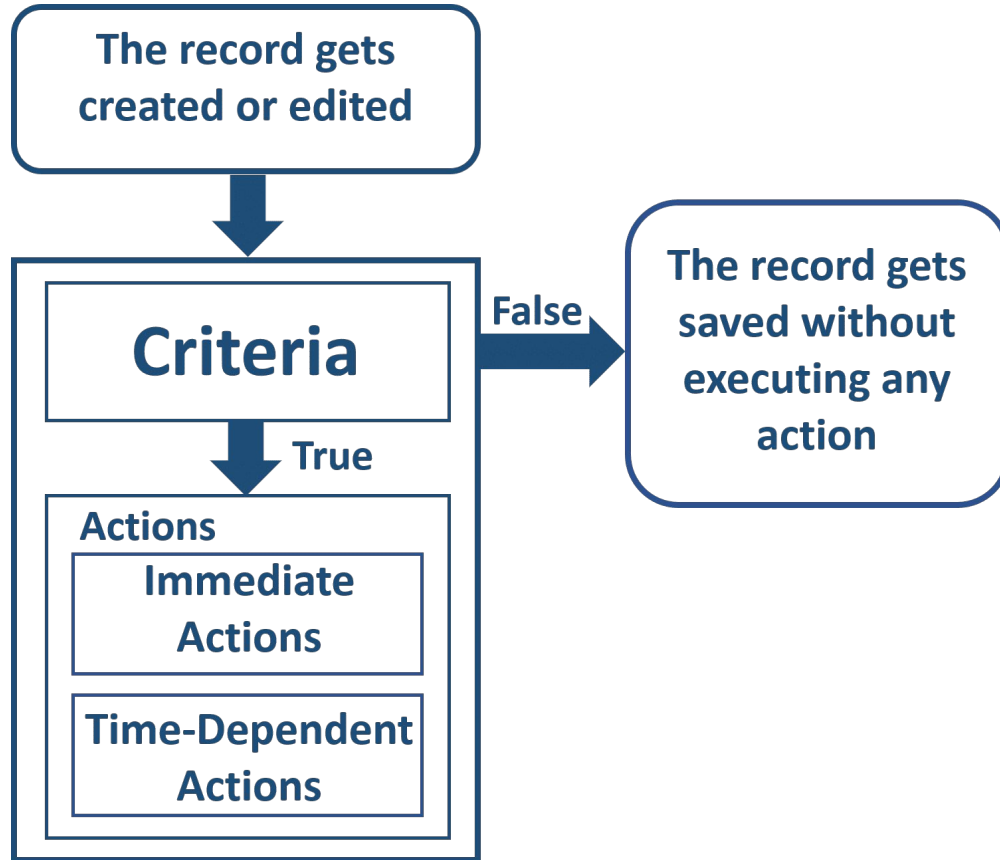
- By default, one can assign one page layout to a profile (1:1)
 - When you have one profile but wanting to assign multiple page layouts to support business process go for **Record Types**

EXAMPLE



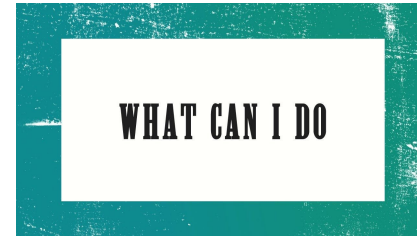
- E:g - Sales VP, Pharma Product wants to track different products like Oral drug, Topical Medicines, Novel Drug Formulations as part of product expansion decided by the management. Each product type will have unique information to be captured and reported
 - **Option 1:** Create 3 page layout with different fields and assign to his profile ???
 - **Option 2:** Create 3 page layouts with different fields, 3 record types and assign to his profile

Workflow & Process builder



Workflow rule,

- Evaluate the rule criteria **each time a record is created or updated**



- Email alert
- Field update
- Create Tasks
- Outbound message

WorkFlow, Process Builder, Approval
Process, Flow

Evolution of automation tools (*click & code*).....



WORKFLOW

- *Update a field*
- *Send an email*
- *Create a Task*
- *Send an outbound message*



PROCESS BUILDER

- *Create a record (not just Tasks!)*
- *Update related records*
- *Launch a Quick Action*
- *Post to Chatter*
- *Launch a Flow*
- *Call Apex code*
- *Submit for approval*
- *Invoke another process*

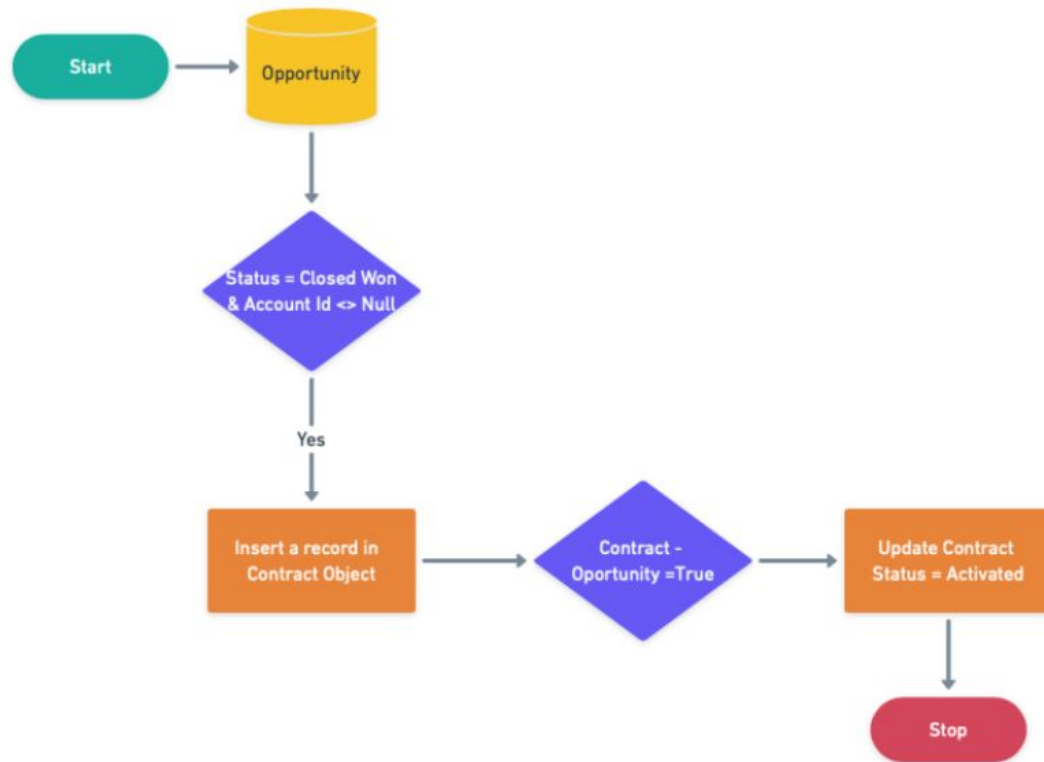


VISUAL FLOW

- *Display data to your users with screen elements (Think a wizard style interface)*
- *Control logic by creating branches and looping over data sets.*
- *Lookup, create, update, or delete Salesforce records.*



Process Builder - Sample



You are a System Administrator at Universal Containers (UC). At UC they are using Salesforce to manage their customer Contracts. Salesforce allows you to create a Contract for an Account.

Whenever an Opportunity is successfully closed (Stage: – Closed Won), auto-create a new Contract and activate it. Also, set the Contract Start Date = Close date of current Opportunity and Contract Term (months) = 12.

Process Builder - Few more use cases

Cathy is working as a System Administrator at Universal Containers (UC). He received a requirement to build a process that would automatically create a child case whenever a new case is created with the Case Reason – Breakdown.

Steve is working as a System Administrator at Universal Containers (UC). He received a requirement to auto-create a new Opportunity whenever an Opportunity is successfully closed and set the Close date for the new Opportunity to 120 days from the old opportunity close date.

Eric is working as a System Administrator at Universal Containers (UC). He received a requirement to auto-update Asset Description (with the sentence “*Update the Serial Number*”) field after 1 day of its creation if Asset’s Serial Number is blank

Dominc is working as a System administrator at Universal Containers (UC). She has received a requirement to post Opportunity details to the UC Internal Announcement Chatter group whenever an Opportunity gets created or updated with an amount greater than 100,000 and also mention related user Opportunity Owner in the post