

PROCESS BUILDER

Limitations of Workflow Rules

1. Workflow Rule supports the below 4 actions only.

1. Email Alerts
2. Field Update
3. Assigning a task to User
4. Sending XML based SOAP message to External System.

2. Workflow Rule do not support DML Operations.

3. Using work flow rules we can perform Cross-Object Field Updates. But

The Objects should be associated with "Master-Detail" Relation.

We can update the field from "Child Object to Parent Object" but vice-versa is not possible.

4. We cannot automate complex operations through Workflow Rules.

The above drawbacks can be overcome using a process automation tool called "Process Builder".

Process Builder: Process Builder is a graphical representational tool, used to automate the complex operations.

Process Builder supports the below actions.

1. **Email Alerts:** Using this action, we can send an email notification to one or more users by using a Pre-Existing Email Template.

2. **Create a Record:** Using this action, we can create a new record inside the Object. i.e., we can create an independent/related record inside the object.

3. **Trigger an Apex:** Using this action, we can invoke an Apex class method from the Process Builder.

4. **Update a Record:** Using this action, we can update a record inside the object. We can perform Cross-Object Record Updates from Parent to Child and Vice-Versa. For Cross-Object record update, the objects may be associated with either "Lookup / Master-Detail association".

5. **Post to Chatter:** By using this action, we can post the feed item inside the Chatter Feed.

6. **Submit a Record for Approval:** This action allows us to submit the record for the approval automatically based on the entry criteria.

7. **Invoke a Process:** By using this action, we can invoke another process inside the Organization. i.e., we can implement "Chaining Processes".

8. **Invoke a Flow:** By using this action, we can invoke a flow inside the organization.

9. **Send Custom Notifications:** By using this action, we can send custom notifications to the users, which reminds the people with a pop-up alert.

10. **Add a Quip Message:** Quip is a business process automation tool used to create the documents, add word processing features, create chat rooms, and share the content to the people etc.

Navigation

Click on "Setup" menu.

1. Search for the option "Process Builder".
2. Click on "New" button.
3. Enter the Process Name, Unique Name and Description.
4. Select the option "When the Process should get Start".
 1. When a Record changes.
 2. It's invoked by another process.
 3. When a Platform Event Message has been received.
5. Click on "Save" button.
6. Configure the Process.
7. Click on "Activate" button.

Each process should be associated with an Object. An object can have one or more associated Processes. We can configure maximum of 50 active processes per an object.

Process Builder can fire either "After Insert/After Update" the record inside the associated object.

We can configure the processes by using "Process Explorer".

Email Alerts: By using this action, we can send an Email Notification to one or more users by using a pre-existing email template.

While sending the emails through Process Builder, we have to follow the below 3 steps.

Step 1: Create an email template with the required subject and content.

Step 2: Create an email alert to specify the recipient people and email template and CC Copy Email Addresses.

Click on "Setup" menu.

1. Search for the option "Email Alerts".
2. Click on "New" button.
3. Enter the Email Alert Description, Unique Name.
4. Select the "Object Name" from the Picklist.
5. Select the Email Template by using "Lookup icon".
6. Select the Recipients from the List.
7. Enter the CC Copy Email Addresses.
8. Click on "Save" button.

Step 3: Create a process to send the email, by referencing the Email Alert.

Use Case: Configure a Process on the Hiring Manager Object, to send the Email Alert to HR person upon creating a new Hiring Manager Record.

Object Name: Hiring Manager

Event / Evaluation Criteria: Creating a New Record.

Rule Conditions: Hiring Manager: Email Address!= Null

Action Type: Immediate Actions

Action Name: Email Alert

Email Alert Name: (Reference Name)

Create a Record

By using this action, we can create a new record inside the same object on which the processes have been configured or we can create a related record inside the child object.

While creating the record inside the object, we can supply the values for the fields by hard coding inside the Process or we can reference the values from the parent record fields.

Use Case: Configure a process on account object to create a related contact record for the account, if the account record meets the below conditions.

1. Account:Rating == 'Hot'
2. Account:Industry == 'Finance'
3. Account:Active__C == 'Yes'

Object Name: Account Object.

Process Starts: When a Record Changes.

Event / Evaluation Criteria: When a Record Created.

Rule Conditions:

1. Account:Rating == 'Hot'
2. Account:Industry == 'Finance'
3. Account:Active__C == 'Yes'

Action Type : Immediate Action.

Action Name : Create a Record.

Record Type : Contacts

Supply the Values:

Source Field (Account)

Account:Name
Account:Phone

Account:Fax

Account:BillingStreet
Account:BillingCity

Account:BillingState
Account:BillingCountry

Account:BillingPostalCode

Account:ID

Target Field (Contact)

Contact:LastName
Contact:Business Phone

Contact: Business Fax

Contact:MailingStreet
Contact:MailingCity

Contact:MailingState
Contact:MailingCountry

Contact:MailingPostalCode

Contact:AccountID

Update a Record: By using this action, we can update the record inside the object, by assigning the new values for the fields.

We can update multiple fields inside the record by using a Single action.

Process Builder allows us to update the records in the same object as well as in the related object.

i.e., we can perform cross object record update from "Child to Parent" and "Parent to Child", between the objects associated with either Lookup/Master-Detail" association.

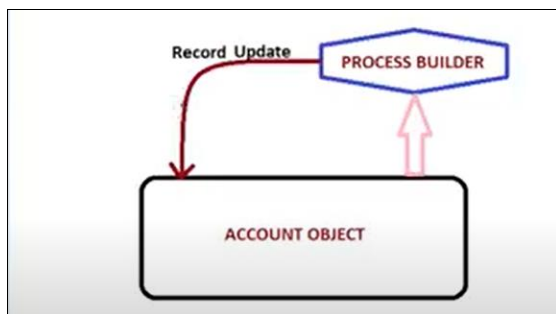


Fig: Simple Record Update

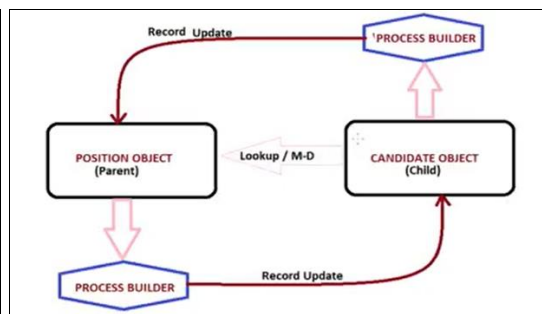


Fig: Cross Object Record Update

Use Case: Configure a process on the account object, to synchronize the Active Account's Phone, Fax and Address details into the Related Contacts if any changes are made in the Account Record.

Object Name : Account Object.

Process Starts: When a Record Changes.

Event / Evaluation Criteria: When a Record Created / Edited.

Rule Condition: Account: Active__C == 'Yes'

Action Type : Immediate Action.

Action Name : Record Update.

Record Type : Contacts.

Supply the Values by referencing from the parent fields

<u>Source Field (Account)</u>	<u>Target Field (Contact)</u>
Account:Phone	Contact:Business Phone
Account:Fax	Contact: Business Fax
Account:BillingStreet	Contact:MailingStreet
Account:BillingCity	Contact:MailingCity
Account:BillingState	Contact:MailingState
Account:BillingCountry	Contact:MailingCountry
Account:BillingPostalCode	Contact:MailingPostalCode

Post to Chatter: Chatter is an Internal Communication Messenger given by Salesforce which is used to communicate with the other users inside the Organization over the internet.

It provides the bi-directional communication. Once the Feed Item has been posted inside the Chatter Feed, other users inside the group can Comment / Like / Follow the notification.

We can post the Feed Item inside the Chatter Feed automatically with the help of "Process Builder", by using the action "Post To Chatter".

Use Case: Configure a Process on the Contact Object, to post the Feed Item to the Administrator User to notify to collect the Email Address of the Contact Person which can be used for the future communications.

Include the Contact Person Details inside the "Feed Item".

Object Name: Contact Object.

Process Starts: When a Record Changes.

Event / Evaluation Criteria: When a Record Created.

Rule Conditions: 1. Phone Number!= Null.

2. Email == Null.

Action Type : Immediate Action.

Action Name : Post To Chatter.

Message:

Dear Customer Support Team,

We have observed the below Contact Person have not provided the Email Address inside the Record.

Please communicate with the Person and collect the Email and update in our Database for future Communication.

Contact Details:

Contact Record Id: {[Contact].Id}

Contact Person Name: {[Contact].FirstName} {[Contact].LastName}

Contact Number (Phone): {[Contact].Phone}

Mobile Phone: {[Contact].MobilePhone}

Please update the details ASAP.

Thanks