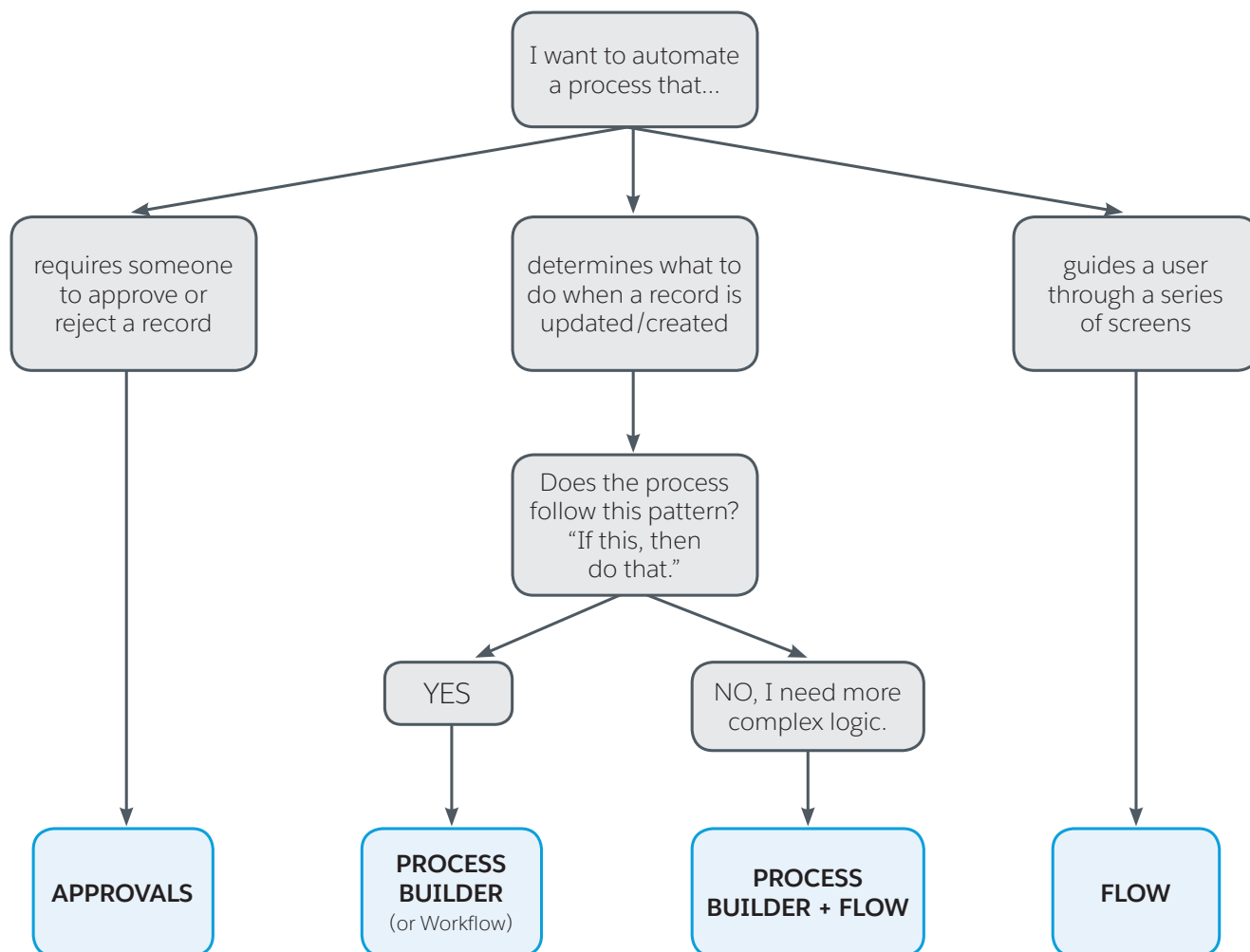


# Process Automation Cheatsheet

## Which Automation Tool Should I Use?



## Getting Started

*Approval processes* automatically route a record to the right Salesforce users, who then approve, reject, or reassign it. Based on how users respond to the record at different steps throughout and at the end of the process, Salesforce performs automated actions.

The *Process Builder* is a point and click designer that lets you automate **multiple** rules (sets of criteria and actions) in a single process. When a new or updated record meets your specified criteria, the process kicks off and performs the actions you configured.

*Workflow rules* operate as **individual** if/then processes that can automate a subset of the actions available in Process Builder.

*Flows* automate virtually any process. Use it to automate processes that you can't automate with the other three tools, like wizards or background processes that use complex branching logic.

For more details about these use cases, see the Process Automation module in Trailhead.

## What's Available in My Edition?

	Professional	Enterprise, Performance, Unlimited, and Developer
Approvals	Extra cost	✓
Process Builder	Not available	✓
Workflow	Extra cost	✓
Visual Workflow	Not available	✓

## Feature & Action Comparison

Here's the breakdown of all the features and actions that are supported in each of our automation tools. Use it to figure out which tool is best for your business needs.

	Process Builder	Flow	Workflow	Approvals
Complexity	Multiple if/then statements	Complex branching logic statement	One if/then statement	One if/then statement
Visual designer	✓	✓		
Operates on multiple objects		✓		
Starts when	Record is changed	<ul style="list-style-type: none"> <li>• User clicks button, link, or custom tab</li> <li>• Process starts</li> <li>• Apex is called</li> </ul>	Record is changed	<ul style="list-style-type: none"> <li>• User clicks button or link</li> <li>• Process or flow starts that includes a "Submit for Approval" action</li> <li>• Apex is called</li> </ul>
Time-based actions	✓	✓	✓	
User interaction		✓		✓
Supported Actions				
Call Apex code	✓	✓	Tasks only	Tasks only
Create records	✓	✓		
Delete records		✓		
Launch a flow	✓	✓		
Post to Chatter	✓	✓		
Send email	✓ (Email alerts only)	✓	✓ (Email alerts only)	✓ (Email alerts only)
Send SOAP messages to an external web service	✓ (with Apex)	✓ (with Apex)	✓ (with clicks)	
Submit for approval (Automatic)	✓	✓		
Update field	Any related record	Any record	The record or its parent	The record or its parent