Process Builder and Approval Process

salesforce

Learning Topics

- What is Process Builder
- Why Use Process Builder in Salesforce?
- Components of Process Builder
- Actions
- Limitations

Process builder

- It is one of the automation tools provided by salesforce.
- It helps in automating business processes and gives a graphical representation while building it.
- It is quite similar to workflows but with more powerful functionality and drag-and –drop visual interface.
- One of main limitation of process builder compared to workflow is it can not send outbound messages.

Why to use process builder

- **Easy to use:** The visual breakdown provided by Process Builder enables you to know in a glance what exactly you need to expect in every process.
- **Quick development:** Applications are developed with Process Builder are.
- It can combine multiple workflows into a single process and can have a chain of criteria (if-then statements).
- Child records can be updated in Process Builder.
- Chatter group and email alerts both can be notified using Process Builder.
- Multiple actions can be associated with each criterion.
- Apex code and simple tasks can be accessed and replaced by the builder.

Components of process Builder

It consist of three main components.

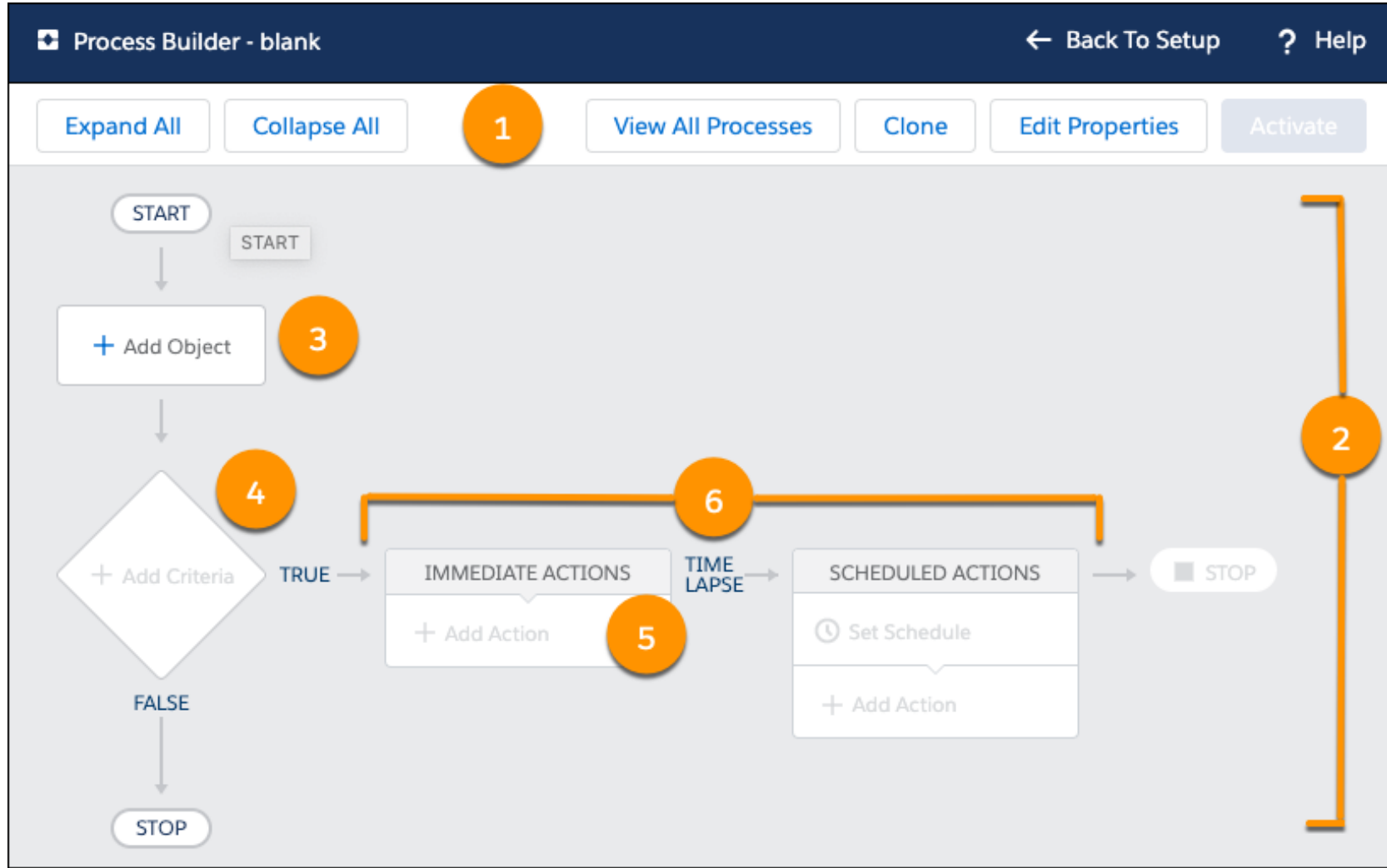**Trigger-** It identifies when the process should run.

A record changes-When record is created /updated

Event process- when platform event message is received

Invocable process –When another process invokes it

Criteria- On what conditions it should execute actions

Actions- Different actions like create record, post to chatter etc.

Expand All   Collapse All   **(1)**   View All Processes   Clone   Edit Properties   Activate

START

START

+ Add Object   **(3)**

(4)

(2)

+ Add Criteria   →   TRUE   → **(6)**

IMMEDIATE ACTIONS

+ Add Action   **(5)**

TIME LAPSE   →

SCHEDULED ACTIONS

🕐 Set Schedule

+ Add Action

→ ▪ STOP

FALSE

STOP

Actions

- Create a record of any object type
- Update any related record
- Use a quick action to create a record, update a record, or log a call
- Invoke a process from another process
- Launch a flow
- Send an email
- Send custom Notification
- Post to Chatter
- Submit a record for approval

Limitations and considerations

Limitations
- Delete the records
- We can not use process builder in before event on DML
- Clone the record
- Update unrelated records.
- Send Outbound messages

Considerations
- Have only one process builder per object
- Avoid infinite looping

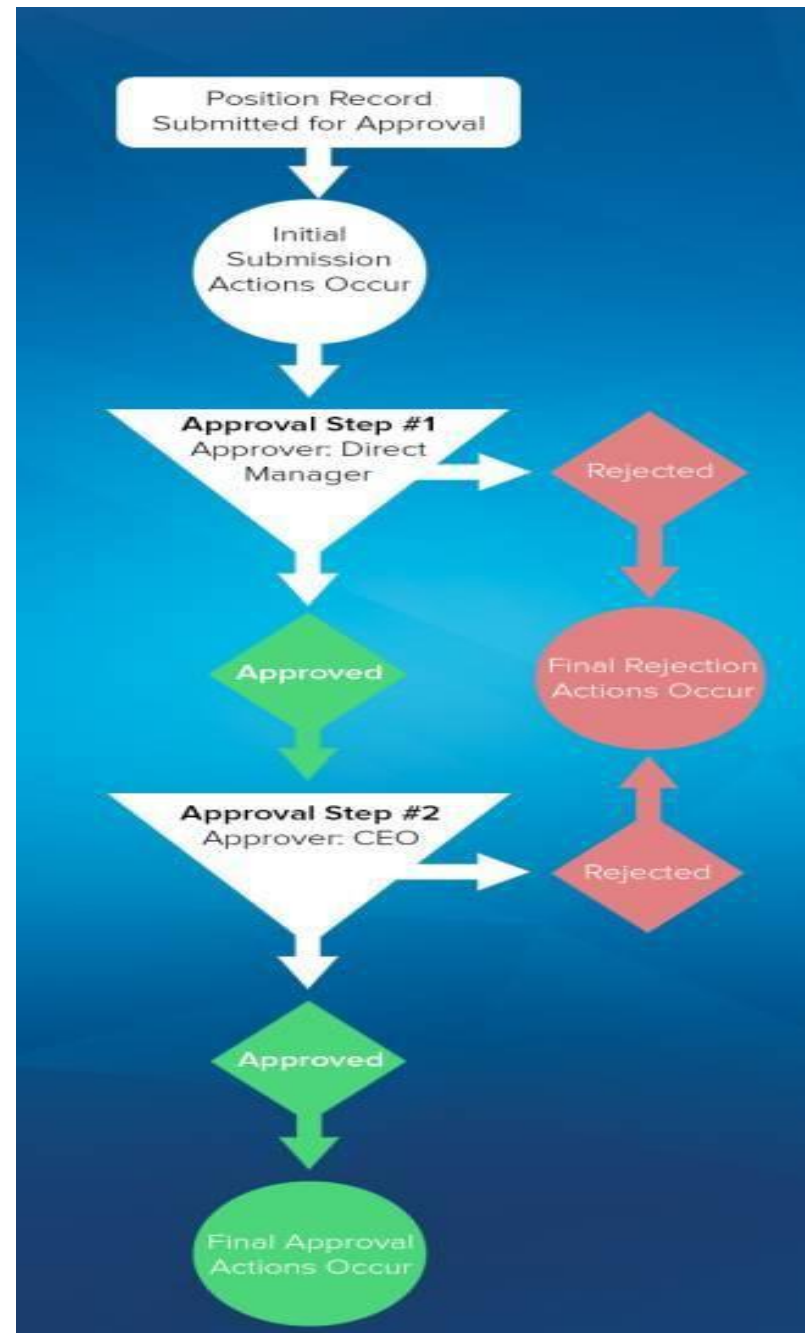# Get ready to say Goodbye to Process Builder forever!!!!

There will be a formal end-of-life roadmap, governed by an end-of-life council, and they have several stages of retirement planned (Safe Harbor):
- Spring '22 release: launch migration tool for Workflow Rules
- Summer '22 release: launch migration tool for Process Builder
- Winter '23 release: you will no longer be able to create new Process Builders or Workflow Rules

This will be a gradual process!

Approval Process

Approval Process in Salesforce is an automated **process** that automates how Salesforce records are approved in your org. **Approval Process in Salesforce** is a combination of steps for a record to be approved/rejected either by a user, queue or public groups. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval.
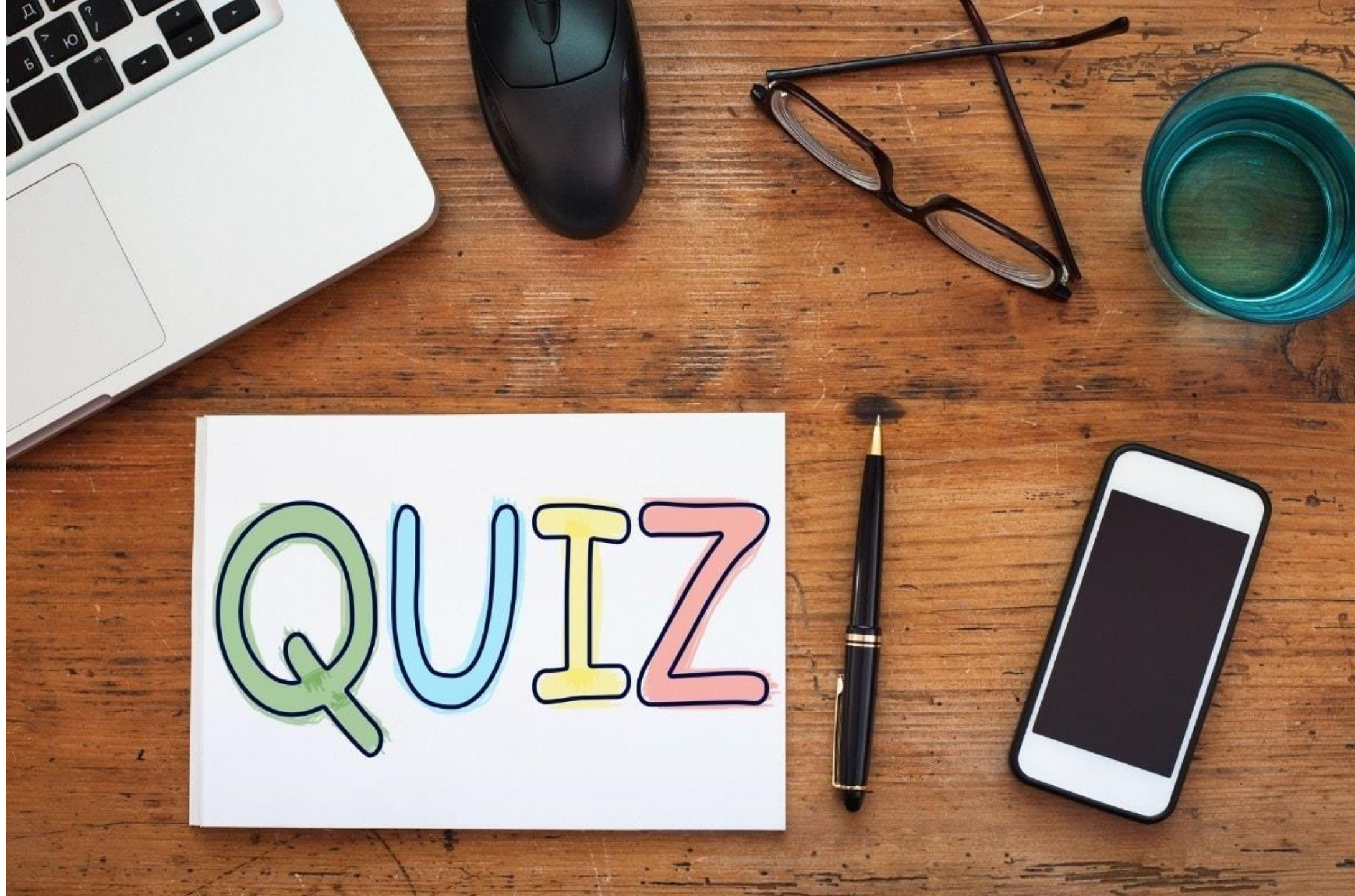
Which Automation Tool Is Right for My Use Case?

When it's all said and done, a process-driven experience isn't backed by only one process. It's a combination of all the business processes in your org that can impact your customer. Each business process typically falls into one of these camps.

Type of Business Process	Description	Available Tools
Guided visual experience	Business processes that need input from users, whether they're employees or customers.	Flow Builder
Behind-the-scenes automation	Business processes that get all the necessary data from your Salesforce org or a connected system. In other words, user input isn't needed.	Flow Builder (Recommended) Process Builder (Use for existing processes) Apex
Approval automation	Business processes that determine how a record, like a time-off request, gets approved by the right stakeholders.	Approvals

Trailhead Links

1. Approvals
2. Process Builder
3. Flows

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Please reach out in case of any queries ☺

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