

Salesforce Automation – Process Builder

Session 1



Outline

Automation process is a
gift from machines

I. Choose the right tools

- No-codes and low-codes
- Automation tools

II. What is process builder?

- Components of a process builder
- Trigger & criteria
- Actions

III. Practice use cases

- No-codes process builder
- Low-code process builder
- Integrate with Apex



I. Choose the right tools

No-codes & Low-codes

Automation processes used to be difficult and time-consuming

- Too-many integrations
- Complex logical background

-> Salesforce flow steps in



Salesforce's Automation tools

AUTOMATION TOOLS IN SALESFORCE

PROCESS BUILDER

Built with extensive features and has helped administrators perform huge tasks with ease.

01

02

Automation of standard Internal procedures and processes to save time across the cloud.

WORKFLOW

FLOW BUILDER

Flow collects data and performs actions based on business needs.

03

04

Helps automating how records are approved in Salesforce.

APPROVALS

Cyntexa



II. What is process builder

Components

Definition

Process Builder is a point-and-click tool that lets you easily automate if/then business processes and see a graphical representation of your process as you build.

Components

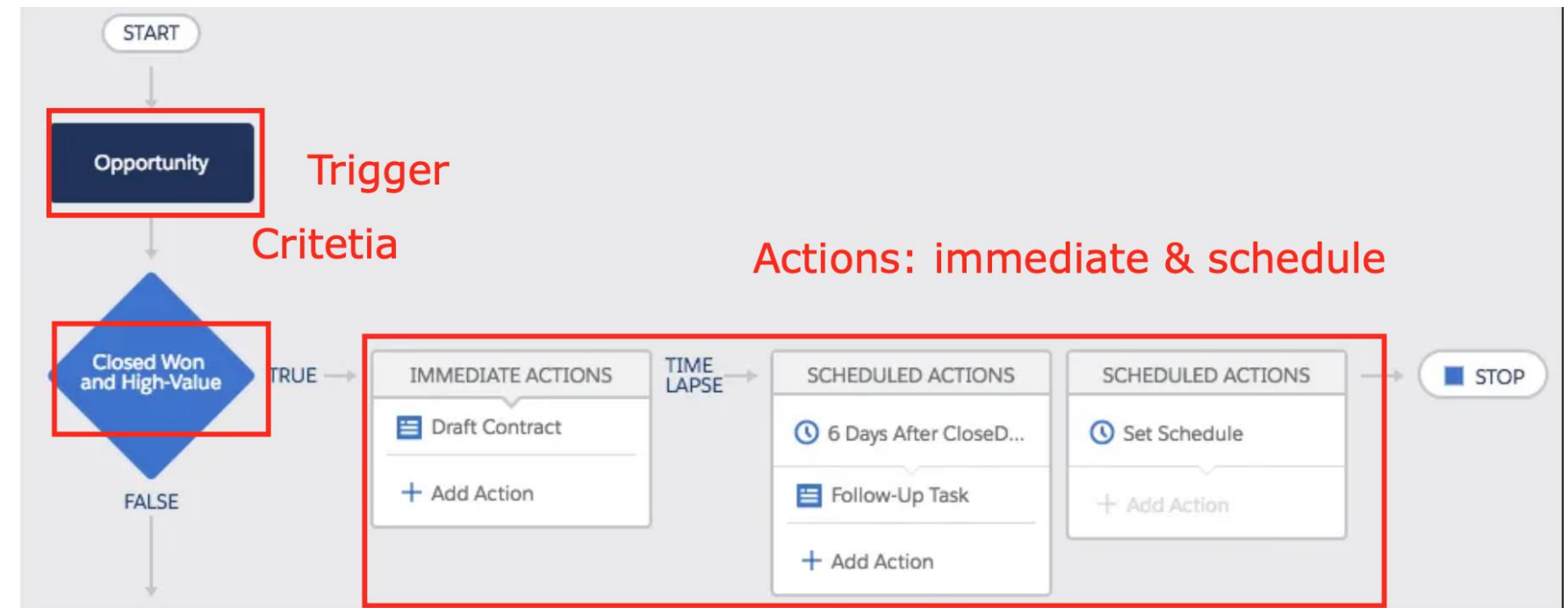
Salesforce's process builder is consisted of:

- Trigger
- At least one criteria node
- At least one action



II. What is process builder

Trigger & criteria



Trigger

Can be one of the followings:

- + a record changes
- + a platform message is received
- + invoked by another process



II. What is process builder

Trigger & criteria

Criteria

Once you got a trigger -> you can add as *many* criteria nodes as your desires.

In each criteria node, you can:

- + set filter conditions
- + enter a custom formula (sound familiar?)
- + opt out of criteria and always execute the associated actions.



II. What is process builder

Actions

Immediate action

Executes as soon as the criteria returns
TRUE

Schedule action

Thoes that come with Salesforce as default
objects, like Accounts, Contacts,
Opportunities, etc



What happens if the criteria do
not return true anymore in case
of scheduled action?



II. What is process builder

Actions

- Processes start when a record is created or edited -> Salesforce automatically removes those for you
- In case of “creating” trigger only -> Salesforce will not remove the scheduled actions
- Salesforce recalculates the time for you
- With deleted records, processes are deleted as well



III. Practice use cases

Funny parts here

No-codes

Auto update contact's name

Low-codes

Auto create contacts

Time for some integration

Custom email notification



Q&A

