[Process Automation](https://developer.salesforce.com/trailhead/module/business_process_automation)

Figure Out Which Tool To Use

http://bit.ly/which\_tool

## **Learning Objectives**

After completing this unit, you will be able to:

* Describe and compare the different options for automating business processes in Salesforce
* Determine which tool is right for a given use case

## **Salesforce Process Automation Suite**

Salesforce provides multiple tools to automate your org’s repetitive business processes: Lightning Process Builder, Visual Workflow, Workflow, and Approvals. The automation tool that you need depends on the type of business process that you’re automating.

* What to do when a record has certain values

Example: Notify an account’s owner when a related case is escalated.

* Collecting information from users or customers and then doing something with that information

Example: Customer support uses a wizard to step through a call script, and cases are created based on the information they enter.

* How a record gets approved

Example: Managers approve their direct reports’ requests for time-off.

### What to Do When a Record Has Certain Values

This is the most common type of process that you can use Salesforce to automate, and three of our tools address this use case: Process Builder, Visual Workflow, and Workflow.

We recommend starting with Process Builder, especially if your business process boils down to a simple if/then statement. For example:

**IF** a case is escalated, **THEN** notify the owner of the associated account.

Process Builder includes almost all the functionality that’s available with Workflow, and then some. In fact, a single process can do what it would normally take multiple workflow rules to do, which helps you avoid limits.

There are only two things that you can do with workflow that you can’t do with processes.

* Configure actions to be executed at different times.

With a process, you can configure actions to be performed later, but all those actions are performed at the same time. If you need multiple “later”s, use workflow. For example, use multiple time triggers in a workflow rule to send an account manager email reminders one month, two weeks, one week, and three days before the related contract expires.

* Send outbound messages without code. However, you can work around this limitation by calling Apex code from a process.

If the process is too complicated for the Process Builder or requires more advanced functionality, create a flow with Visual Workflow. For example, create a flow if you need to:

* Use complex branching logic (that is, if certain conditions are true, evaluate for further conditions)

Example: First, check whether a case is escalated. Second, check the account’s region and route the case accordingly.

* Sort through, iterate over, and operate on several records

Example: After an opportunity is closed and won, calculate the opportunity’s discount. Then apply that discount to all the related opportunity products.

### Get Information from Users or Customers and Do Something with It

If you need to build a wizard to collect information, Visual Workflow is the tool for you. Create a flow that displays information to and requests information from users. Then take the information that they enter and perform actions in Salesforce with it.

For example, create a flow that walks customer support representatives through a call script. At the end, the flow uses information that the representative entered, such as the caller’s name and account number, to create a case and route it to the right person.

You can add more complexity to the flow to match your business process, such as:

* Route the representative to different screens, depending on earlier choices. This prevents the representative from doing things like trying to upsell a product to a customer who already bought that product.
* Check if the reported problem is blocking the customer’s business and the account is high-value. If so, the flow notifies the region director.

### How a Record Gets Approved

For example, when an employee requests time off, that time has to be approved by the employee’s manager. You need to ensure that when a time-off request is submitted for approval, the right person (the employee’s manager) receives the request.

To automate your org’s process of approving records, use Approvals.

## **Automation Tool Features**

Here’s a breakdown of all the features and actions that are supported in each automation tool. Use it to determine which tool is best for your business needs.

|  | **Process Builder** | **Visual Workflow** | **Workflow** | **Approvals** |
| --- | --- | --- | --- | --- |
| **Complexity** | Multiple if/then statements | Complex | A single if/then statement | A single if/then statement |
| **Visual designer** | check icon indicating true | check icon indicating true |  |  |
| **Browser support** | All (Chrome recommended) | All (Safari not recommended) | All | All |
| **Starts when** | Record is changed | * User clicks button or link * User accesses custom tab * Process starts * Apex is called | Record is changed | * User clicks button or link * Process or flow starts that includes a “Submit for Approval” action * Apex is called |
| **Supports time-based actions** | check icon indicating true | check icon indicating true | check icon indicating true |  |
| **Supports user interaction** |  | check icon indicating true |  |  |
| **Supported Actions** | | | | |
| **Call Apex code** | check icon indicating true | check icon indicating true |  |  |
| **Create records** | check icon indicating true | check icon indicating true | Tasks only | Tasks only |
| **Delete records** |  | check icon indicating true |  |  |
| **Launch a flow** | check icon indicating true | check icon indicating true | check icon indicating true (Pilot)1 |  |
| **Post to Chatter** | check icon indicating true | check icon indicating true |  |  |
| **Send email** | check icon indicating true(Email alerts only) | check icon indicating true | check icon indicating true(Email alerts only) | check icon indicating true(Email alerts only) |
| **Send outbound messages without code** |  |  | check icon indicating true | check icon indicating true |
| **Submit for approval** | check icon indicating true | check icon indicating true |  |  |
| **Update fields** | Any related record | Any record | The record or its parent | The record or its parent |

1The Process Builder has superseded flow trigger workflow actions, previously available in a pilot program. Orgs that are using flow trigger workflow actions can continue to create and edit them, but they aren’t available for new orgs.

