

Choose Automation Tool:

Lightning Flow provides declarative process automation for every Salesforce app, experience, and portal.

Lightning Flow **includes** Process Builder and Flow Builder, to build processes and flows respectively.

LF is the product, PB and FB are the tools.

Which tool to use, when?

Process Type, Description, Available Tool(s)

- Guided visual Exp., processes that need input from user-emp or cust, **Flow Builder**.
- Behind-scenes automation, processes that get all data from your org or connected system - no user input, **Process Builder, Flow Builder, Apex** (cust code)
- Approval automation, process that determine how a record gets approved by stakeholders, **Approvals**.

Best practice to start with declarative no-code tools and work up to code solutions.

Use **Process Builder** when starting a behind scenes process automatically:

- Record is created/updated
- A platform event occurs

Use **Flow Builder** to:

- Automate a guided visual experience.
- Add functionality for behind-scenes process on top of PB. Call the flow from the process
- Start behind-scenes process when a user clicks something.

Use **Apex** when you need more functionality than the previous two offer. Build it as invocable Apex methods. Then call as an Apex action in the process or Apex action element in the flow.

PB and FB offer more features and can do more than **Workflow**. They also include new functionality for behind the scenes automation.

**Process Builder** in more detail:

Point/Click tool that lets you automate **if/then** processes and see a graphical representation as you build. (LucidChart, for example)

A **Trigger** identifies when to run the process(only one per process). **Criteria nodes** (unlimited#) on that process controls whether or not the process executes the associated actions. If a criteria is not met, the process moves to the next Criteria Node in the process.

Each Criteria node can:

- Set filter conditions
- Enter a custom formula (validation rules, for example)
- Opt out of criteria and always execute the associated actions.

### **Process Actions**

When a criteria node evals true, process executes actions (**immediate**) or waits to execute at a scheduled time (**scheduled**). A scheduled action will check the criteria node still evals to true before executing. Schedule based on specific date/time field OR time that the process ran (ex: 3 days from now...)

Some examples of process actions:

- Create record. Update record that triggered process OR any related record(s)
- Submit record for approval
- Send emails using a template, Post to a feed

Process Types and Triggers: Type - Trigger

- Record Change - Triggered when record is created or edited
- Invocable (method) - Triggered when called by another process
- Platform Event - Triggered when platform event message is received (Listener?)

**Flow Builder** in more detail: