

Create a New Process on the Account Object


Introduction

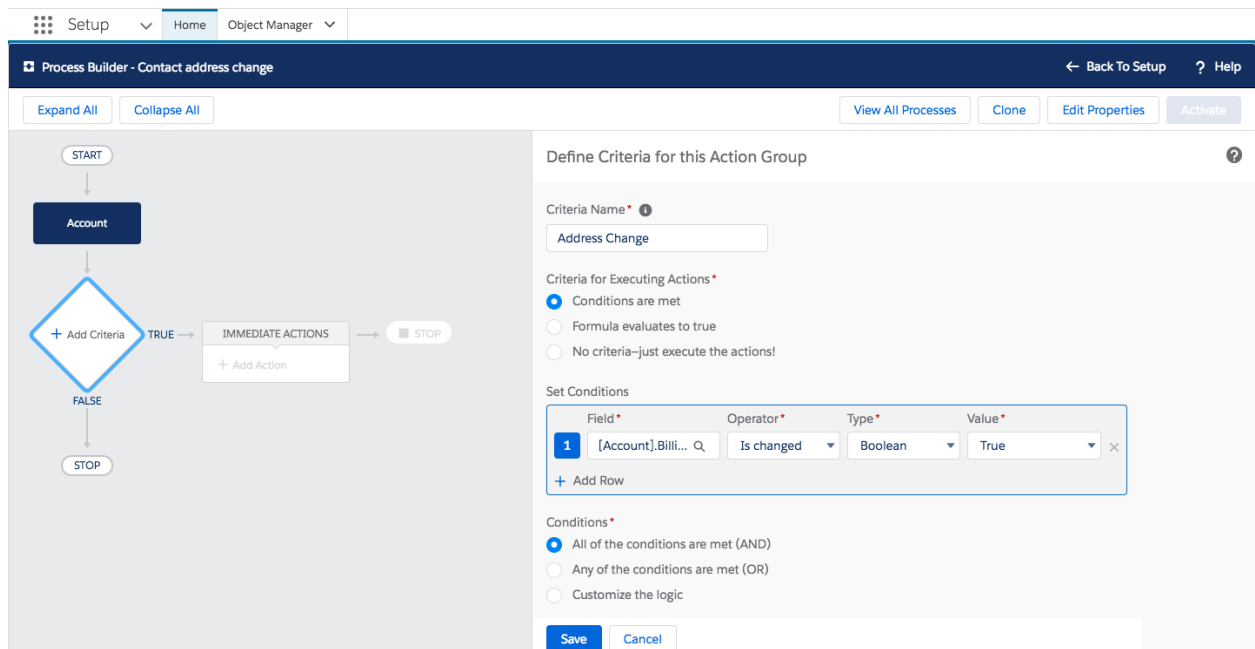
Process Builder is a workflow tool that helps automate business processes without writing a single line of code. For example, imagine that a company you do business with (which we call an Account in Salesforce), changes its location. You'd want a way to automatically update the business address of all the people that work at that company (your Contacts).

In this Quick Start, you'll do exactly that: create a new process that updates Contact records whenever the Account billing address changes. As you'll see, it's quite easy, and doesn't require a shred of code.

Create a New Process on the Account Object

You first create a process and then select the object on which the process runs. You also make sure the process kicks off whenever a record is edited, because you're going to change the business address in a moment.

1. Click  and select Setup. This launches Setup in a new tab.
2. From Setup, enter Builder in the Quick Find box, and select Process Builder.
3. Click New.
4. For Process Name, type Contact address change.
5. For The process starts when, select A record changes, and click Save.
6. Click + Add Object.
7. In the right window, select Account from the Object drop-down list.
8. For Start the process select when a record is created or edited.
9. Click Save.



Add Your Process Action

Create an Action

At this point you've defined a process, and told it when to fire, but you haven't told it what to do. In this step you define what happens when the Billing Street changes.

1. Under the Immediate Actions box, click + Add Action.
2. In the Action Type drop-down list, select Update Records.
3. For Action Name, type Update Contact Addresses.
4. For Record Type, click the radio button next to Select a record related to the Account, then scroll down and select Contacts, and click Choose. This is pretty powerful stuff, so pause and take note. Process Builder allows you to choose not just fields on Accounts, but fields that are related to Accounts.
5. For Criteria for Updating Records, keep it set at No criteria—just update the records!.
6. Under Set new field values for the records you update, click Find a field..., and then scroll down and select Mailing Street.
7. Select Field Reference for the Type.
8. For Value, select Billing Street as the Account field and click Choose.
9. Click Save.

10. Click Activate and then click Confirm.

Setup Home Object Manager

Process Builder - Contact address change Back To Setup Help

Expand All Collapse All View All Processes Clone Edit Properties Activate

Select and Define Action

Action Type*
Update Records

Action Name*
Update Contact Addresses

Record Type*
[Account].Contacts

Criteria for Updating Records*
☐ Updated records meet all conditions
☒ No criteria—just update the records!

Set new field values for the records you update

Field*	Type*	Value*
Mailing Street	Field Reference	[Account].BillingStreet
+ Add Row		

Save Cancel


Some important things to note before you move on:

- This task adds only one action, but you could add multiple actions for one criteria.
- Did you notice that Accounts have a field called Billing Street, but that Contacts have a field called Mailing Street? That's OK, it's a different field name, but you'll use the same value.
- Once a process is activated, it cannot be edited. If you need to make edits to an activated process, follow these steps: (1) Clone the process as a version of the current process; (2) make changes to the cloned process; (3) activate the new version.

Test Your Process

Check the Process

If everything works correctly, whenever an account has a change of address, the address change is made for everyone who works for that company. Let's test that.

1. Click  to open the App Launcher. Select Contacts.
2. Click Recently Viewed and select the All Contacts list, then click Tim Barr.
3. On Tim Barr's contact record, click Details.
4. On Tim Barr's detail page, note the mailing address [1] and account name [2].

Contact

Mr. Tim Barr

Account Name

Grand Hotels & Resorts Ltd

Phone(2) ▼

(303) 555-1212

Email

barr_tim@grandhotels.com

Title

SVP, Administration and Finance

Phone

(303) 555-1212

Email

barr_tim@grandhotels.com

RELATED

DETAILS

NEWS

Contact Owner

Deepthi Bhasuru

Phone

(303) 555-1212

Name

Mr. Tim Barr

Home Phone

(303) 555-1212

Account Name

Grand Hotels & Resorts Ltd

Mobile

(303) 555-1212

Title

SVP, Administration and Finance

Other Phone

Department

Finance

Fax

(312) 596-1500

Birthdate

8/18/1951

Email

barr_tim@grandhotels.com

Reports To

Assistant

Lead Source

External Referral

Asst. Phone

External Phone ID

Mailing Address

2335 N. Michigan Avenue, Suite 1500
Chicago, IL 60601, USA

Other Address

5. Click the account name, Grand Hotels & Resorts Ltd. This opens the account for Grand Hotels & Resorts Ltd.
6. On the Grand Hotels & Resorts Ltd. account record, click Details.
7. Click Edit.
8. Change the billing street address and click Save.
9. Click Related.
10. Scroll down to Contacts and click Tim Barr. Click Details. On his detail page, notice that his mailing address has been updated.

Summary

Congratulations! With just a few clicks, you have created a business process to update child records and keep your data clean and accurate. Experiment with adding more criteria or actions to broaden the functionality.