Getting Started with Salesforce Process Builder

In the most recent Salesforce updates there have been huge improvements in the scope and flexibility of the Process Builder. These enhancements allow you to automate multi-step processes across many related objects and with complex logic.

Let's walk through a simple example of using Process Builder. For this use case, let’s say we need to send a survey to a contact related to a case and update the contact record. With normal workflow rules, updating related records is very limited. With the new features in Process Builder, it's a simple task.

Let's get started.

Create your Process:

Select your object. We select ‘Case’ and that we want the process to run whenever a case is created or edited.

Now we click in the Add Criteria square. We give our criteria a name and select ‘Conditions are met’. Both these options give great flexibility.

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Select Field.

Add the Criteria.

Define Criteria for this Action Group

Criteria Name *
Case Closed

Criteria for Executing Actions *
- Conditions are met
- Formula evaluates to true
- No criteria—just execute the action

Set Conditions

<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Type</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Case] IsClosed</td>
<td>Equals</td>
<td>Boolean</td>
<td>True</td>
</tr>
</tbody>
</table>

Conditions *
- All of the conditions are met (AND)
- Any of the conditions are met (OR)
- Customize the logic

Advanced
Do you want to execute the actions only when specified changes are made to the record?

Important!! - Select ‘Yes’ so that the actions you add are only triggered when the record is updated to meet your criteria. Also, you would not be able to add scheduled tasks similar to standard W.F.R.

Next, select the schedule task action so the survey goes out after the case is closed.

Set Time for Actions to Execute

<table>
<thead>
<tr>
<th>Days</th>
<th>Hours from now</th>
</tr>
</thead>
</table>

The ‘from now’ field schedules the action after the record is updated to meet the given criteria. Keep in mind, it’s not, in fact, the literal sense of now.
Select ‘Add action’ and select the ‘Contact ID’ as the related Record to update.

Then select the field to update and the value to update it to. You can even use a formula or reference.

You can also send an email alert in a similar way to complete the process. That’s it! All you need to do is activate it!