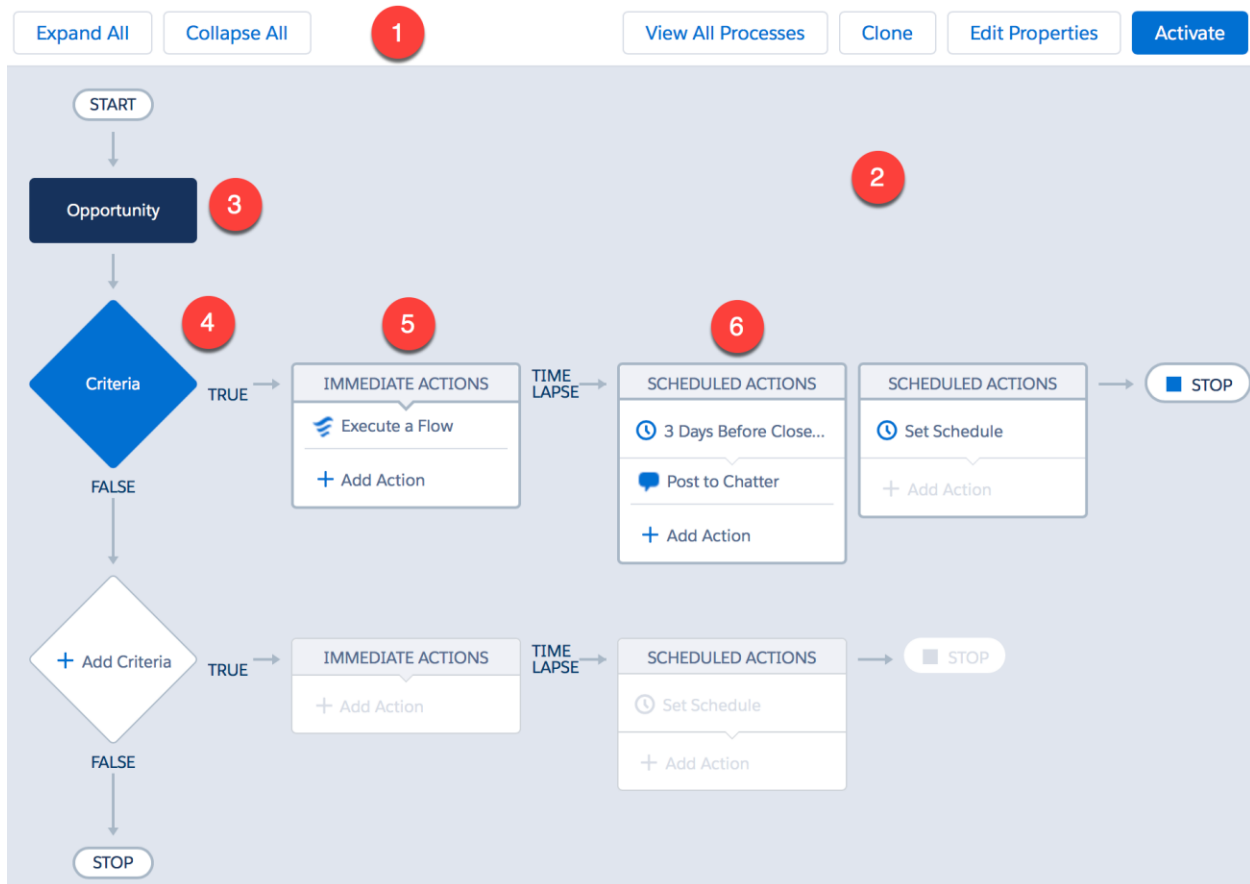


Chapter 1: Getting Started with Lightning Process Builder



Properties

Process Name *

Post Opportunty Information to Chatter Group

API Name * ?

Post_Opportunty_Information_to_Chatter_Group

Description

Post Opportunty Information to Chatter Group

Cancel

Save

+ Add Object

Choose Object and Specify When to Start the Process ?

Object *

Account

Start the process *

- only when a record is created
- when a record is created or edited

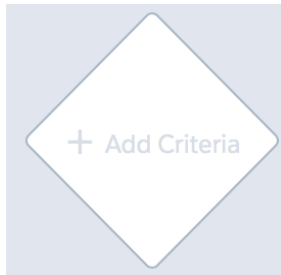
Advanced

Recursion - Allow process to evaluate a record multiple times in a single transaction? ?

Yes

Save

Cancel



New Process

Process Name *

Auto create new Contract

API Name * ?

Auto_create_new_Contract

Description

Auto create new Contract

The process starts when *

A record changes ▼

Cancel

Save

Define Criteria for this Action Group ?

Criteria Name * ?

Always

Criteria for Executing Actions *

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

Save

Cancel

IMMEDIATE ACTIONS

+ Add Action

Select and Define Action ?

Action Type*

Action Name* i

Record Type*

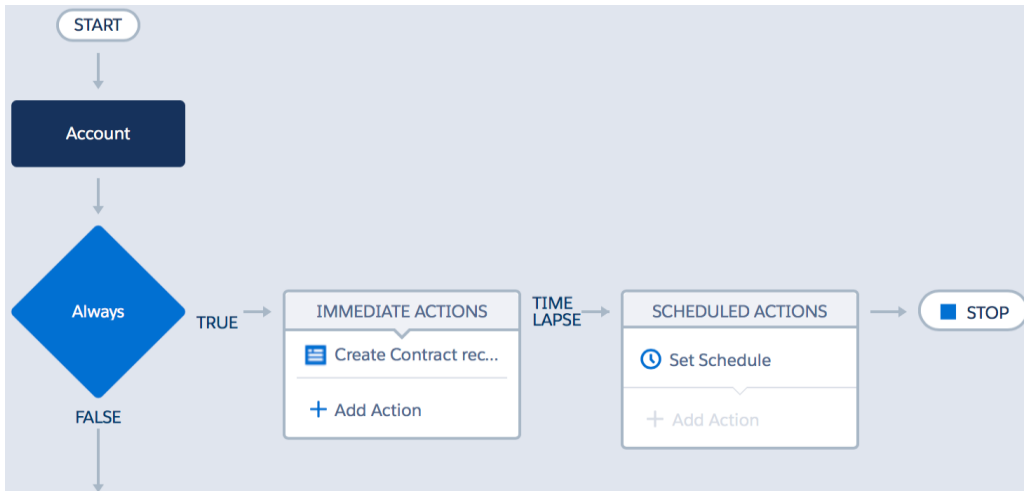
Set Field Values

Field*	Type*	Value*
<input type="text" value="Account ID"/>	<input type="text" value="Reference"/>	<input type="text" value="[Account].Id"/>
<input type="text" value="Status"/>	<input type="text" value="Picklist"/>	<input type="text" value="Draft"/>
<input type="text" value="Contract Term"/>	<input type="text" value="Number"/>	<input type="text" value="12"/>
<input type="text" value="Contract Start Date"/>	<input type="text" value="Formula"/>	<input type="text" value="DATEVALUE([Account]...."/>

+ Add Row

Insert:

DATEVALUE([Account].CreatedDate) + 90



[View All Processes](#) [Clone](#) [Edit Properties](#) [Activate](#)

Activate Version

Activating this process automatically deactivates any other active version. The deactivated version will be available in your version history.

[Cancel](#) [Confirm](#)

RELATED	DETAILS
Account Owner Rakesh Gupta	Created By Rakesh Gupta, 3/5/2017 10:28 AM
Account Name Automation Champion	Rating
Parent Account	Phone
Account Number	Fax
Account Site	Website
Type	Ticker Symbol
Industry	Ownership
Annual Revenue	Employees
	SIC Code

- Assets (0)
- Contracts (1)**
 - 00000112
 - Contract S... 6/3/2017
 - Contract E... 6/2/2018
 - Status: Draft
 - [View All](#)
- Contacts (0)
- Opportunities (0)
- Cases (0)
- Notes & Attachments (0)

- [View All Processes](#)
[Clone](#)
[View Properties](#)
[Deactivate](#)
Read Only ⓘ

My Processes New
16 items

PROCESS	DESCRIPTION	OBJECT ▲	PROCESS TY...	LAST MODIFIED	STATUS	ACTIONS
> Test Flow	Only for first use case to take the screenshot			3/5/2017	Inactive	
∨ Auto create new Contract (Version 3)						
Version 6: Auto create new Contract (Version ...	Second Edition - Chapter 5	Account		3/5/2017	Inactive	Delete

New Process

Process Name *

Update Contacts Asst Phone

API Name * 

Update_Contacts_Asst_Phone

Description

To update related contact field (Asst. Phone) whenever account Phone gets update

The process starts when *

A record changes 

Cancel

Save

Choose Object and Specify When to Start the Process

Object *

Account 

Start the process *

- only when a record is created
- when a record is created or edited

∨ Advanced

Recursion - Allow process to evaluate a record multiple times in a single transaction? 

Yes

Save

Cancel

Define Criteria for this Action Group



Criteria Name *

Update Contacts

Criteria for Executing Actions *

Conditions are met

Formula evaluates to true

No criteria—just execute the actions!

Set Conditions

	Field	Operator *	Type *	Value *	
1	[Account].RakeshGupta__Active__c	Equals	Picklist	Yes	×
2	[Account].Pho...	Is changed	Boolean	True	×

+ Add Row

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?

Yes

Save Cancel Delete

Select a Record to Update

- Select the Account record that started your process
- Select a record related to the Account

Type to filter list... ▼

- ChildAccounts
- Contacts ←
- ContentDocumentLinks
- Contracts
- Created By ID
- D&B Company ID

Cancel

Choose

Select and Define Action



Action Type *

Update Records

Action Name * ⓘ

Update Asst. Phone

Record Type *

[Account].Contacts

Criteria for Updating Records *

Updated records meet all conditions

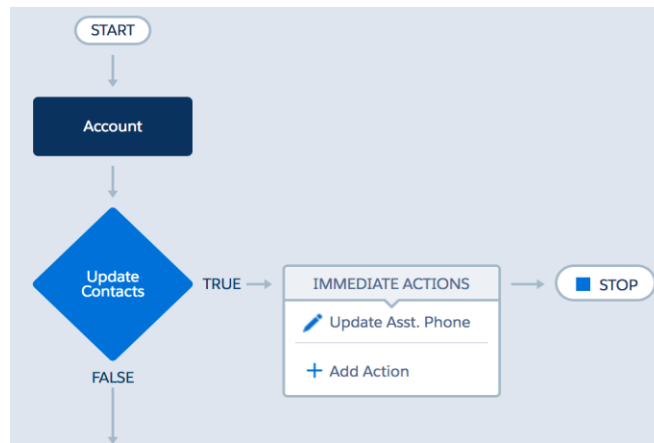
No criteria—just update the records!

Set new field values for the records you update

Field *	Type *	Value *
Asst. Phone	Reference	[Account].Phone

+ Add Row

Save Cancel



ACCOUNT
Burlington Textiles Corp of America

+ Follow Edit New Contact New Case

Type: Customer - Direct Phone: (336) 222-7000 Website: www.burlington.com Account Owner: Rakesh Gupta Account Site: Industry: Apparel

RELATED	DETAILS
Account Owner	Created By
Rakesh Gupta	Rakesh Gupta, 12/19/2014 3:08 PM
Account Name	Rating
Burlington Textiles Corp of America	Cold
Parent Account	Phone
	(336) 222-7000
Account Number	Fax
CD656092	(336) 222-8000
Account Site	Website
	www.burlington.com
Type	Ticker Symbol
Customer - Direct	BTXT
Industry	Ownership
Apparel	Public
Annual Revenue	Employees
\$350,000,000	9,000
	SIC Code
	546732

Assets (0)

Contracts (1)

00000100

Contract S... 2/26/2015

Contract E... 2/25/2016

Status: Draft

[View All](#)

Contacts (3+)

Rakesh Gupta

Title:

Email: rgupta@burlington.com

Asst. Pho... (336) 222-7000

Tricia Mora

Title:

Email: tmora@burlington.com

Asst. Pho... (336) 222-7000


Jack Rogers

Title: VP, Facilities


Email: jrogers@burlington.com

Asst. Pho... (336) 222-7000

Clone this Process

Save Clone as... * 

Version of current process A new process

Process Name * API Name * 

Process Builder - Update Contacts Asst Phone (Version) Update_Contacts_Asst_Phone

Description

Add another filter for country USA

Set Conditions

	Field *	Operator *	Type *	Value *	
1	[Account].Rak... Q	Equals	Picklist	Yes	X
2	[Account].Billing-Country	Is changed	Boolean	True	X
3	[Account].Billi... Q	Equals	String	USA	X

+ Add Row

Select and Define Action ?

Action Type *

Apex

Action Name * i

Assets Validation

Apex Class * i

RakeshGupta__AssetsValidatio

Set Apex Variables

Field *	Type *	Value *	
AssetIds	Reference	[Asset].Id	X

+ Add Row

Save Cancel

Define Criteria for this Action Group



Criteria Name*

Only when amount > \$1M

Criteria for Executing Actions*

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

Set Conditions

	Field*	Operator*	Type*	Value*	
1	[Opportunity]... Q	Greater than	Currency	\$1,000,000	X
+ Add Row					

Conditions*

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

Save Cancel Delete

Select and Define Action



Action Type*

Post to Chatter

Action Name*

Post to Sales Executive Chatter gro

Post to*

Chatter Group

Group*

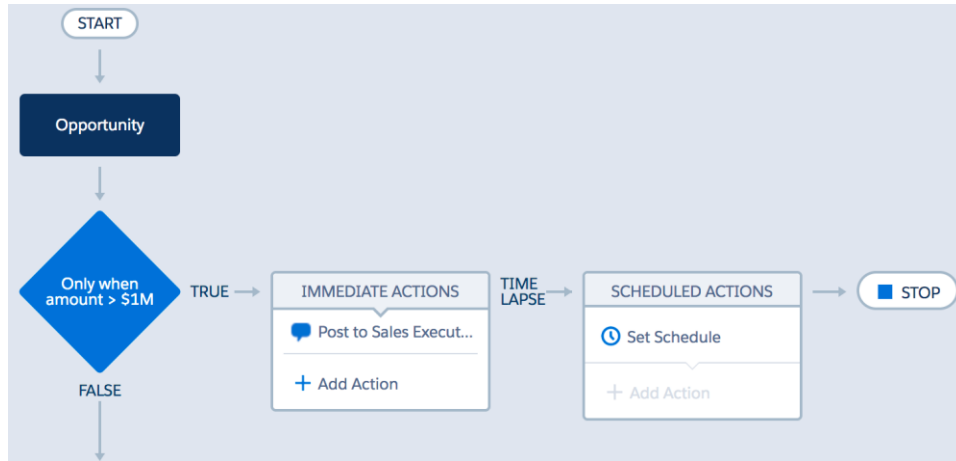
Sales Executive

Message*

Merge Field Add an existing topic...

An Opportunity {[Opportunity].Name} is created with amount {[Opportunity].Amount}.
URL :- [https://gs0.salesforce.com/{\[Opportunity\].Id}](https://gs0.salesforce.com/{[Opportunity].Id})

Save Cancel



Sales Executive – Rita Zonius

2m ago



An Opportunity GenePoint Standby Generator is created with amount 8,500,000.

URL :- <https://gs0.salesforce.com/006B0000001fDS4IAM>



Like



Comment



Share

1 view



Write a comment...

Subject | New opportunity gets created for your account - {!Account.Name}

HTML Preview

Dear {!Account.OwnerFullName},

A new opportunity gets created for your account {!Account.Name}. Below is some key information of new opportunity

Name :- {!Opportunity.Name}
 Stage:- {!Opportunity.StageName}
 Amount:- {!Opportunity.Amount}
 Close Date:- {!Opportunity.CloseDate}
 Owner:- {!Opportunity.OwnerFullName}

Best Regards,
 Universal Containers Sales Team

Edit Email Alert

Description | Email to Account Owner

Unique Name | Email_to_Account_Owne [i](#)

Namespace Prefix | RakeshGupta

Object | Opportunity

Email Template | Account owner notificati [🔍](#)

Protected Component |

Recipient Type | Search: [⌵](#) for: [Find](#)

Recipients

Available Recipients

User: Alice Atwood
User: Demo User
User: Helina Jolly
User: Madhuri Menton
User: Rakesh Gupta
User: Rita Zonius

Add



Remove

Selected Recipients

Account Owner

You can enter up to five (5) email addresses to be notified.

Additional Emails

From Email Address | [⌵](#)

Make this address the default From email address for this object's email alerts. [i](#)

Set Conditions

	Field *	Operator *	Type *	Value *	
1	<input type="text" value="[Opportunity].AccountId"/>	Greater than ▾	Currency ▾	<input type="text" value="\$1,000,000"/>	×
2	<input type="text" value="[Opportunity].... Q"/>	Is null ▾	Boolean ▾	<input type="text" value="False"/>	×
+ Add Row					

Set Time for Actions to Execute



5 Days After CreatedDate

Days from now.

Save **Cancel**

Select and Define Action



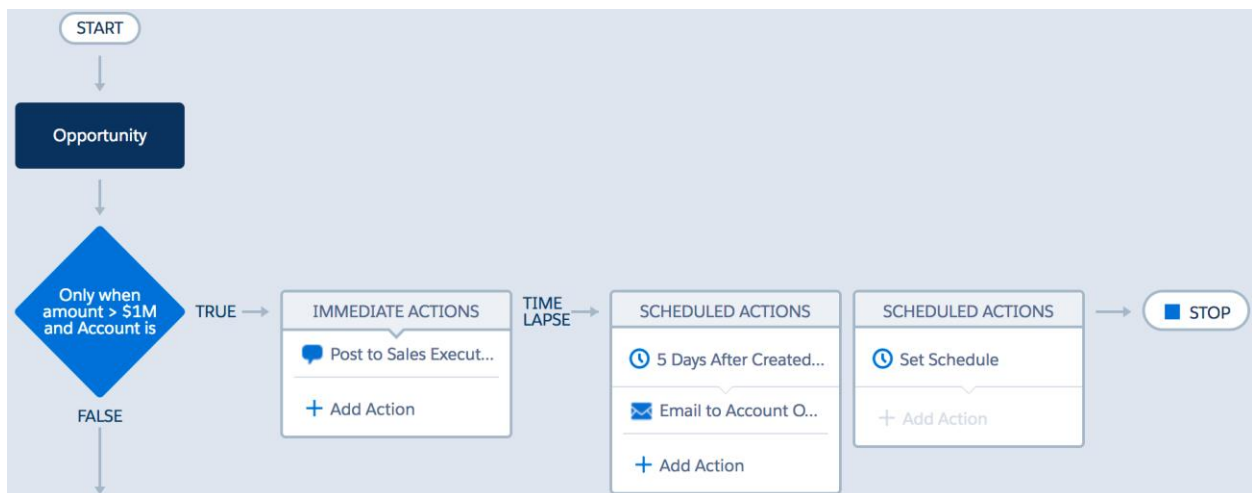
Action Type *
Email Alerts

Action Name *
Email to Account Owner

Email Alert *
Email_to_Account_Owner

Select an existing email alert for the object that this process is associated with. If none exist, [create one](#).

Save **Cancel**



New opportunity gets created for your account - Express Logistics and Transport Inbox x



Rakesh Gupta via 6f2zcrzmwnxr.b-176wmaa.ç

4:11 AM (0 minutes ago) ☆



to me ▾

Dear Rita Zonius,

A new opportunity gets created for your account Express Logistics and Transport. Below is some key information of new opportunity

Name :- Express Logistics SLA
Stage:- Perception Analysis
Amount:- \$4,500,000.00
Close Date:- 5/24/2017
Owner:- Rakesh Gupta

Best Regards,
Universal Containers Sales Team

Paused and Waiting Interviews

View: MY View ▾ [Edit](#) | [Create New View](#)

Action	Name ↑	Flow Name	Flow Version	Type	Interview Label
Del	00000018	Post_Opportuntiy_Information_to_Chatter_Group	9	Workflow	Post_Opportuntiy_Information_to_Chatter_Group-9_InterviewLabel
Del	00000019	Post_Opportuntiy_Information_to_Chatter_Group	10	Workflow	Post_Opportuntiy_Information_to_Chatter_Group-10_InterviewLabel

Process Definition Detail

[Edit](#) [Clone](#) [Deactivate](#) [View Diagram](#)

Process Name	Opportunity amount greater than 1M	Active	<input checked="" type="checkbox"/>
Unique Name	Opportunity_amount_greater_than_1M	Next Automated Approver Determined By	
Description			
Entry Criteria	Opportunity: Amount GREATER THAN 1000000		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Approval Post Template			
Initial Submitters	Opportunity Owner		
Created By	Rakesh Gupta , 2/12/2015 5:31 PM	Modified By	Rakesh Gupta , 2/12/2015 5:35 PM

Initial Submission Actions [i](#)

[Add Existing](#) [Add New](#)

Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps [i](#)

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Step 1			User:Rakesh Gupta	Final Rejection

Final Approval Actions [i](#)

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

Final Rejection Actions [i](#)

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

Recall Actions [i](#)

[Add Existing](#) [Add New](#)

Action	Type	Description
	Record Lock	Unlock the record for editing

Select and Define Action



Action Type*
Submit for Approval

Action Name* ⓘ
Auto submit record into approval

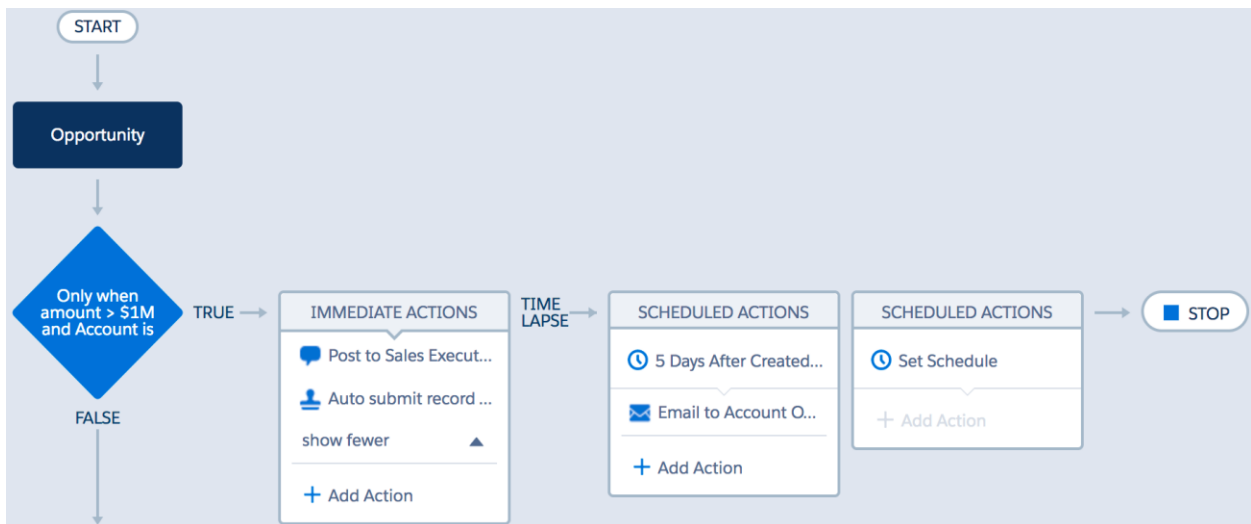
Object*
Opportunity

Approval Process*
Default approval process

Submitter* ⓘ
Current User

Submission Comments ⓘ
Auto submit

Save Cancel



Record Create

Select the type of record you want to create, then insert flow values into its fields.

General Settings






Name *

Unique Name * 

[Add Description](#)

Assignments

Create * with the following field values:

Field	Value	
<input type="text" value="AccountId"/>	<input type="text" value="{!VarTAccountId}"/>	
<input type="text" value="CloseDate"/>	<input type="text" value="{!VarD90DaysFromToday}"/> 	
<input type="text" value="Name"/>	<input type="text" value="{!VarTAccountName}"/>	
<input type="text" value="StageName"/>	<input type="text" value="Prospecting"/>	


[Add Row](#)

Assign the record ID to a variable to reference it in your flow.

Variable

Flow Properties


Name *

Unique Name * 

Description

Type 

Doesn't require user interaction. Autolaunched flows can be launched automatically by the system, like with a process or Apex.

Interview Label 

Select and Define Action



Action Type*

Flows

Action Name* ⓘ

Auto create new Opportunity

Flow* ⓘ

Create an Opportunity

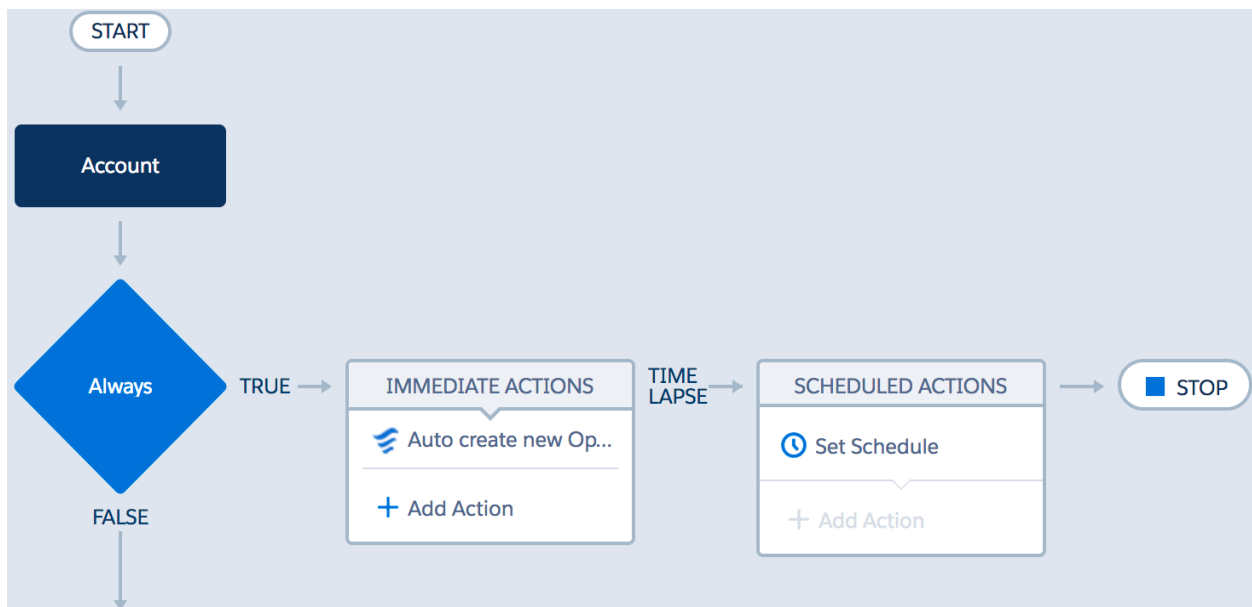
Select an existing flow. If none exist, [create one](#).

Set Flow Variables

Flow Variable *	Type *	Value *
VarD90DaysFromToday	Formula	TODAY() +90
VarTAccountId	Reference	[Account].Id
VarTAccountName	Reference	[Account].Name

+ Add Row

Save Cancel






Rakesh Gupta
Edited Just Now



Opportunity "Express Logistics SLA" is successfully closed by

 **Express Logistics SLA**
<https://gs0.salesforce.com/006B0000001fDSYIA2>



Like



Comment



Share

3 views



Write a comment...

Chapter 2: Deploying, Distributing, and Debugging Processes

Create a Package

[Help for this Page](#) 

Package Edit

Package Name Managed

Language

Configure Custom Link

Notify on Apex Error

Description

Package

Distribute Process

[Help for this Page](#) 

[« Back to Package List](#)

Package Detail

Package Name	Distribute Process	Type	Unmanaged
Language	English		
Notify on Apex Error			
Created By	Joe Thompson , 3/8/2017 12:02 AM	Last Modified By	Joe Thompson , 3/8/2017 12:02 AM
Description	Distribute "Auto create new Contract" Process		

Components

Versions


No package components defined



Component Type:

[<Previous Page](#) | [Next Page>](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

<input type="checkbox"/>	Name ↑
<input type="checkbox"/>	Add New Users to Chatter Group
<input type="checkbox"/>	Add users to Chatter Group
<input checked="" type="checkbox"/>	Auto create new Contract 
<input type="checkbox"/>	Copying the record followers
<input type="checkbox"/>	Create an Opportunity
<input type="checkbox"/>	Create Child case for Breakdown
<input type="checkbox"/>	Create Leads
<input type="checkbox"/>	Create New Opportunitiy
<input type="checkbox"/>	Custom settings in Flow
<input type="checkbox"/>	Displaying feedback form based on age
<input type="checkbox"/>	Display leads
<input type="checkbox"/>	Display message after login
<input type="checkbox"/>	Event Registration Form
<input type="checkbox"/>	Generic Flow Account
<input type="checkbox"/>	LoggedIn User Name
<input type="checkbox"/>	Real estate brokerage calculator

Show me [fewer](#) / [more](#) records per list page

Upload Succeeded: Distribute Process, v2.0 Inbox x

 **Salesforce** <noreply@salesforce.com>
to me

11:08 PM (0 minutes ago) ☆ ↶ ⋮



 Package Upload Succeeded

Distribute Process
Version 2.0

 Use this URL to install the package into any organization:
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04tB00000009KbD>

Note: If you are installing into a sandbox organization you must replace the initial portion of the URL with <http://test.salesforce.com>

This email was sent by

salesforce.com
to rakeshistom-ulvj@force.com.

株式会社セールス
フォース・
ドットコム 〒
100-7012 東京
都千代田区丸の
内2-7-2 JP タ
ワー 12 階

New Account

Review the errors on this page.

We can't save this record because the "Auto create new Contract (Version 3)" process failed. Give your Salesforce admin these details. This error occurred when the flow tried to create records: **FIELD_CUSTOM_VALIDATION_EXCEPTION: Contract term must be greater than 24 months..** You can look up ExceptionCode values in the SOAP API Developer Guide. Error ID: 1978508653-14105 (-1878918395)

Account Information

Account Owner Rakesh Gupta	Rating --None--
* Account Name Gurukul On Cloud	out of business <input type="checkbox"/>
Parent Account Search Accounts...	Phone
Account Number	Fax
Account Site	Website
Type --None--	Ticker Symbol

Error Occurred During Flow "Auto_create_new_Contract": This error occurred when the flow tried to create r... [Inbox](#)

FlowApplication <info@jp.salesforce.com> to me Fri, Jun 29, 11:48 PM (16 minutes ago) ☆ ↶ ⋮

Error element myRule_1_A1 (FlowRecordCreate). This error occurred when the flow tried to create records: **FIELD_CUSTOM_VALIDATION_EXCEPTION: Contract term must be greater than 24 months..** You can look up ExceptionCode values in the [SOAP API Developer Guide](#).

Flow Details

Flow Name: Auto_create_new_Contract
Type: Record Change Process
Version: 8
Status: Active
Org: Automation Champion (00DB000000176w)

Flow Interview Details

Interview Label: Auto_create_new_Contract-8_InterviewLabel
Current User: Rakesh Gupta (005B0000001FYZe)
Start time: 6/30/2018 10:18 AM
Duration: 0 seconds

How the Interview Started

Rakesh Gupta (005B0000001FYZe) started the flow interview. Some of this flow's variables were set when the interview started.
myVariable_old = null
myVariable_current = 001B000000jyqwIAA

ASSIGNMENT: myVariable_waitStartTimeAssignment
(!myVariable_waitStartTimeVariable) Equals (!SFlow.CurrentDateTime)
Result
(!myVariable_waitStartTimeVariable) = "6/30/2018 10:18 AM"

DECISION:

myDecision
Executed this outcome: myRule_1
Outcome conditions: and
1. (!formula_myRule_1) (true) Equals true
Logic: All conditions must be true (AND)

RECORD CREATE:

myRule_1_A1
Create one Contract record where:
AccountId = (!myVariable_current.Id) (001B000000jyqwIAA)
ContractTerm = 12
StartDate = (!formula_2_myRule_1_A1_StartDate) (September 28, 2018)
Status = Draft
Result
Failed to create record.

Error Occurred: This error occurred when the flow tried to create records: FIELD_CUSTOM_VALIDATION_EXCEPTION: Contract term must be greater than 24 months.. You can look up ExceptionCode values in the [SOAP API Developer Guide](#).

```

43.0 APEX_CODE, FINEST;APEX_PROFILING, FINEST; CALLOUT, FINEST; DB, FINEST; NBA, INFO; SYSTEM, FINE; VALIDATION, INFO; VISUALFORCE, FINER; WAVE, INFO; WORKFLOW, FINER
11:00:23.0 (454617) | USER_INIT | [EXTERNAL] | [005B0000001PYze|rakeshistom-ulv@force.com|India Standard Time|GMT+05:30
11:00:23.0 (595448) | EXECUTION_STARTED
11:00:23.0 (605826) | CODE_UNIT_STARTED | [EXTERNAL] | Workflow:Account
11:00:23.0 (12437764) | WF_RULE_EVAL_BEGIN | Workflow
11:00:23.0 (12795495) | WF_CRITERIA_BEGIN | [Account: Gurukul On Cloud 001B000000jtyyM|RakeshGupta_Update_Contacts_Assst_Phone301B0000000CbJi|01QB00000008aDm|CN_ALL_CHANGES|0
11:00:23.0 (13058831) | WF_FORMULA | Formula: ENCODED: [treatNullAsNull]true | Values:
11:00:23.0 (13180873) | WF_CRITERIA_END | true
11:00:23.0 (13878197) | WF_CRITERIA_BEGIN | [Account: Gurukul On Cloud 001B000000jtyyM|RakeshGupta_Auto_create_new_Contract301B0000000CbJi|01QB00000009aIa|OW_CREATE_ONLY|0
11:00:23.0 (14010647) | WF_FORMULA | Formula: ENCODED: [treatNullAsNull]true | Values:
11:00:23.0 (14027753) | WF_CRITERIA_END | true
11:00:23.0 (14098455) | WF_SPOOL_ACTION_BEGIN | Workflow
11:00:23.0 (14254691) | WF_ACTION | Flow Trigger: 2;
11:00:23.0 (14326844) | WF_RULE_EVAL_END
11:00:23.0 (15694156) | WF_FLOW_ACTION_BEGIN | 09L800000009a23
11:00:23.0 (15783842) | WF_FLOW_ACTION_DETAIL | 09L800000009a23 | [Account: Gurukul On Cloud 001B000000jtyyM|Id=09L800000009a23|CurrentRule=RakeshGupta_Auto_create_new_Contract301
11:00:23.19 (19403745) | FLOW_CREATE_INTERVIEW_BEGIN | 00D8000000176w|00D8000000048h|301B00000000Ch3s
11:00:23.19 (20139162) | FLOW_CREATE_INTERVIEW_END | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | Auto create new Contract (Version 3)
11:00:23.0 (20774329) | WF_FLOW_ACTION_DETAIL | Param Name: myVariable_current, Param Value: ENCODED: [!|treatNullAsNull|!|ID:this|], Evaluated Param Value: {Entity type: Account,
11:00:23.21 (21271055) | FLOW_START_INTERVIEWS_BEGIN | 1
11:00:23.21 (21406686) | FLOW_START_INTERVIEW_BEGIN | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | Auto create new Contract (Version 3)
11:00:23.21 (21946244) | FLOW_START_INTERVIEW_LIMIT_USAGE | USAGE | SQL queries: 0 out of 100
11:00:23.21 (22101942) | FLOW_START_INTERVIEW_LIMIT_USAGE | USAGE | SQL query rows: 0 out of 50000
11:00:23.21 (22179857) | FLOW_START_INTERVIEW_LIMIT_USAGE | USAGE | SQL queries: 0 out of 20
11:00:23.21 (22267405) | FLOW_START_INTERVIEW_LIMIT_USAGE | USAGE | DML statements: 0 out of 150
11:00:23.21 (22345355) | FLOW_START_INTERVIEW_LIMIT_USAGE | USAGE | DML rows: 0 out of 10000
11:00:23.21 (22454058) | FLOW_START_INTERVIEW_LIMIT_USAGE | CPU time in ms: 0 out of 15000
11:00:23.21 (22579423) | FLOW_START_INTERVIEW_LIMIT_USAGE | Heap size in bytes: 0 out of 6000000
11:00:23.21 (22677836) | FLOW_START_INTERVIEW_LIMIT_USAGE | Callouts: 0 out of 100
11:00:23.21 (22744774) | FLOW_START_INTERVIEW_LIMIT_USAGE | Email invocations: 0 out of 10
11:00:23.21 (22865429) | FLOW_START_INTERVIEW_LIMIT_USAGE | Future calls: 0 out of 50
11:00:23.21 (22932877) | FLOW_START_INTERVIEW_LIMIT_USAGE | Jobs in queue: 0 out of 50
11:00:23.21 (23023623) | FLOW_START_INTERVIEW_LIMIT_USAGE | Push notifications: 0 out of 10
11:00:23.21 (23665456) | FLOW_VALUE_ASSIGNMENT | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | myVariable_old |
11:00:23.21 (24437911) | FLOW_VALUE_ASSIGNMENT | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | myVariable_current | [Id=001B000000jtyyM|MD, IsDeleted=false, MasterRecordId=null, Name
11:00:23.21 (24739242) | FLOW_ELEMENT_BEGIN | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | FlowAssignment | myVariable_waitStartTimeAssignment
11:00:23.21 (27132835) | FLOW_ASSIGNMENT_DETAIL | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | myVariable_waitStartTimeVariable | ASSIGN | 6/30/2018 11:00 AM
11:00:23.21 (27178597) | FLOW_VALUE_ASSIGNMENT | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | myVariable_waitStartTimeVariable | 2018-06-30T05:30:23Z
11:00:23.21 (27491641) | FLOW_ELEMENT_END | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | FlowAssignment | myVariable_waitStartTimeAssignment
11:00:23.21 (27523905) | FLOW_ELEMENT_BEGIN | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | FlowDecision | myDecision
11:00:23.21 (27775241) | FLOW_RULE_DETAIL | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | myRule_1 | true
11:00:23.21 (27801165) | FLOW_VALUE_ASSIGNMENT | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | myRule_1 | true
11:00:23.21 (29778620) | FLOW_ELEMENT_END | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | FlowDecision | myDecision
11:00:23.21 (29882837) | FLOW_ELEMENT_BEGIN | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | FlowRecordCreate | myRule_1_A1
11:00:23.21 (30076002) | FLOW_ELEMENT_DEFERRED | FlowRecordCreate | myRule_1_A1
11:00:23.21 (30132544) | FLOW_ELEMENT_END | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | FlowRecordCreate | myRule_1_A1
11:00:23.21 (30176448) | FLOW_START_INTERVIEW_END | 462589952b6a6914a3711ee37cd1644e7d5973-48b5 | Auto create new Contract (Version 3)
11:00:23.21 (30625860) | FLOW_BULK_ELEMENT_BEGIN | FlowRecordCreate | myRule_1_A1
11:00:23.21 (48267060) | LIMIT_USAGE | [EXTERNAL] | FIELDS | DESCRIBES | 1 | 100
11:00:23.21 (48403423) | LIMIT_USAGE | [EXTERNAL] | FIELDS | DESCRIBES | 2 | 100
11:00:23.21 (49496649) | FLOW_BULK_ELEMENT_DETAIL | FlowRecordCreate | myRule_1_A1 | 1

```

When a process or flow interview fails, Salesforce sends an email with details about everything that was executed and what failed.

Send Process or Flow Error Email to

Apex Exception Email

[Help for this Page](#)

Set the email addresses that receive notifications when your Apex code encounters unhandled exceptions. Emails can be sent to your Salesforce org's users and to external email addresses.

Salesforce Users

Action	First Name	Last Name	Username	Email Address
Delete	Sarika	Gupta	sarikahojonojono@gmail.com	info@automationchampion.com

Email Addresses Not in Salesforce

External Email Addresses

Chapter 3: Building Efficient and Performance-Optimized Processes

My Processes
17 items

PROCESS	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED	STATUS	ACTIONS
> Test Flow	Only for first use case to take the screenshot			3/5/2017	Inactive	
✓ Auto create new Contract (Version 3) <div style="float: right; margin-top: -15px;"> 5 4 1 New </div>						
Version 7: Auto create new Contract (Version ...	Second Edition - Chapter 5	Account		3/5/2017	Inactive	Delete 3
Version 6: Auto create new Contract (Version ...	Second Edition - Chapter 5	Account		3/5/2017	Inactive	Delete
> Process Builder - Update Contacts Asst Phone...	Add another filter for country USA	Account		3/5/2017	Inactive	
> Auto Create an Opportunity (Version 1)	Second Edition	Account		3/5/2017	Inactive	
> Add records to Chatter Group	Chapter 6	Account		3/20/2015	Inactive	
> Auto update Opportunity	Chapter 1 - Solution 3	Account		2/18/2017	Inactive	
> Create Schedule Job		Schedule Job		3/17/2015	Active	
> Add users to Chatter Group		User		4/19/2015	Active	

View Setup Audit Trail

Date	User	Action	Section	Delegate User ?
3/6/2017 6:32:36 PM PST	sarikahojonojino@gmail.com	Deleted Flow Trigger RakeshGupta_Update_Contacts_Asst_Phone301B0000000CfPs for Object: Account	Workflow Rule	
3/6/2017 6:32:36 PM PST	sarikahojonojino@gmail.com	Deleted workflow rule RakeshGupta_Update_Contacts_Asst_Phone301B0000000CfPs for Object: Account	Workflow Rule	
3/6/2017 6:32:36 PM PST	sarikahojonojino@gmail.com	Deactivated workflow rule RakeshGupta_Update_Contacts_Asst_Phone301B0000000CfPs for Object: Account	Workflow Rule	
3/6/2017 6:32:36 PM PST	sarikahojonojino@gmail.com	Deactivated flow version #4 "Process Builder - Update Contacts Asst Phone (Version 2)" for flow with Unique Name "Update_Contacts_Asst_Phone"	Flows	
3/6/2017 6:01:54 PM PST	alice.atwood@book.com	Created Flow Trigger RakeshGupta_Update_Contacts_Asst_Phone301B0000000CfPs for Object: Account	Workflow Rule	
3/6/2017 6:01:54 PM PST	alice.atwood@book.com	Created workflow rule RakeshGupta_Update_Contacts_Asst_Phone301B0000000CfPs for Object: Account	Workflow Rule	
3/6/2017 6:01:54 PM PST	alice.atwood@book.com	Activated flow version #4 "Process Builder - Update Contacts Asst Phone (Version 2)" for flow with Unique Name "Update_Contacts_Asst_Phone"	Flows	

PROCESS	DESCRIPTION	OBJECT	PROCESS T...	LAST MODIFIED ▲	STATUS	ACTIONS
> Auto call Update Opportunity Lead Source Flo..		Opportunity		2/12/2015	Inactive	
> Create Child case for Breakdown	Create Child case for Breakdown (Blog post)	Case		2/13/2015	Active	
∨ Custom settings in Flow (Version 2)						
Version 3: Custom settings in Flow (Version 2)		Feed Item		3/17/2015	Inactive	Delete
Version 2: Custom settings in Flow (Version 1)		Feed Item		2/19/2015	Active	
Version 1: Custom settings in Flow		Feed Item		2/19/2015	Inactive	Delete
> Schedule Jobs (Version 3)		Schedule J...		3/17/2015	Active	

← FlowDefinition

← Flow

workbench 

Environment: Production

API Version: 37.0

I agree to the terms of service

Login with Salesforce

Workbench 37.0.2

workbench  info queries data migration utilities

ALICE ATWOOD AT AUTOMATION CHAMPION ON API 37.0

Select an action to perform:

Jump to: Metadata Types & Components

Object:

Select

Requested in 0.300 sec
Workbench 37.0.2


Metadata Types & Components

ALICE ATWOOD AT AUTOMATION CHAMPION ON API 37.0

Choose a metadata type describe and list its components:

[Expand All](#) | [Collapse All](#)

- 📁 Type Description
- 📁 Components (89) 
 - 📁 Add_New_Users_to_Chatter_Group
 - 📁 Add_New_Users_to_Chatter_Group-1
 - 📁 Add_New_Users_to_Chatter_Group-2
 - 📁 Add_New_Users_to_Chatter_Group-3
 - 📁 Add_records_to_Chatter_Group
 - 📁 Add_users_to_Chatter_Group
 - 📁 Add_user_to_multiple_queue-1
 - 📁 Assets-1
 - 📁 Auto_call_Update_Opportunity_Lead_Source_Flow-1
 - 📁 Auto_Create_an_Opportunity-1
 - 📁 Auto_Create_an_Opportunity-2
 - 📁 Auto_Create_an_Opportunity-3
 - 📁 Auto_create_new_Contract-6
 - 📁 Auto_create_new_Contract-7
 - 📁 Auto_update_Opportunity-1
 - 📁 Auto_update_Opportunity-2
 - 📁 Auto_update_Opportunity-3
 - 📁 Copying_the_record_followers
 - 📁 Copying_the_record_followers-1
 - 📁 Create_an_Opportunity
 - 📁 Create_an_Opportunity-1
 - 📁 Create_an_Opportunity-2
 - 📁 Create_an_Opportunity-3
 - 📁 Create_Child_case_for_Breakdown
 - 📁 Create_Leads
 - 📁 Create_Leads-1
 - 📁 Create_Leads-2
 - 📁 Create_Leads-3
 - 📁 Create_Leads-4
 - 📁 Create_Leads-6

- Update_Assets_owner-1
- Update_Contacts_Asst_Phone-1
 - createdById: **005B0000001FYZeIAO**
 - createdByName: **Rakesh Gupta**
 - createdDate: **2015-02-12T07:47:42.000Z**
 - fileName: **flows/Update_Contacts_Asst_Phone-1.flow**
 - fullName: **Update_Contacts_Asst_Phone-1**
 - id: **301B00000004K7UIAU**
 - lastModifiedById: **005B0000001FYZeIAO**
 - lastModifiedByName: **Rakesh Gupta**
 - lastModifiedDate: **2015-02-12T08:34:38.000Z**
 - manageableState: **unmanaged**
 - namespacePrefix: **RakeshGupta**
 - type: **Flow**
- Update_Contacts_Asst_Phone-2
- Update_Contacts_Asst_Phone-4
- Update_Opportunity_Lead_Source

New Custom Label

[Help for this Page](#)

Custom Label Edit Save Save & New Cancel

Short Description	<input type="text" value="Sales Executive Id"/>		Name	<input type="text" value="Sales_Executive_Id"/>
Namespace Prefix	<input type="text" value="RakeshGupta"/>		Protected Component	<input checked="" type="checkbox"/>
Language	<input type="text" value="English"/>			
Categories	<input type="text" value="Chatter Group ID"/>			
Value	<input style="width: 100%;" type="text" value="0F9B0000000CyPe"/>			

Save Save & New Cancel

Choose Object and Specify When to Start the Process

Object *

▼

Start the process *

only when a record is created

when a record is created or edited

Advanced

Recursion - Allow process to evaluate a record multiple times in a single transaction? ⓘ

Yes

Save Cancel

Define Criteria for this Action Group



Criteria Name*

Only for active campaigns

Criteria for Executing Actions*

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

Set Conditions

	Field	Operator*	Type*	Value*	
1	[Campaign].IsActive	Equals	Boolean	True	X

+ Add Row

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?

Yes

Save

Cancel

Select a Global System Variable

SLabel ▶ Type to filter list... ▼

- Config_ShowNoneOption
- ErrMsg_General
- ErrMsg_NoFieldConfigure
- ErrMsg_NoObjectWriteAc
- InfoMsg_NoMoreFieldsAvail
- Sales Executive Id

Cancel

Choose

Select and Define Action



Action Type *

Quick Actions

Action Name * ?

Add record to Chatter group

Filter Search By * Type * Action *

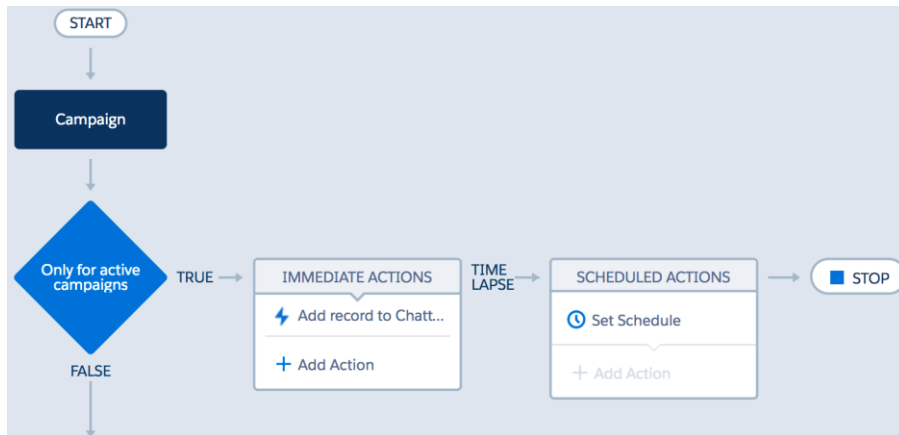
Type Create a Record CollaborationGroup.Raise:

Set Quick Action Field Values

Field *	Type *	
Related Record ID	Formula	SLabel.Sales_Executive_Id
Record ID	Reference	[Campaign].Id

+ Add Row

Save Cancel



The screenshot shows a Salesforce group page for 'Sales Executive'. At the top, there are navigation links: 'Add Record', 'Manage Notifications', and 'Edit Group'. The group is owned by 'Sales Executive' and is public. Below the header, there are tabs for 'CHATTER' and 'ENGAGEMENT'. The 'CHATTER' tab is active, showing a post creation area with options for 'Post', 'Poll', 'Question', and 'Announcement'. A post by 'Rakesh Gupta' is visible, dated March 5, 2017, at 2:41 PM. The post content is: 'An Opportunity Express Logistics SLA is created with amount 4,500,000. URL :- https://gs0.salesforce.com/006B0000001D5YIA2'. Below the post are 'Like', 'Comment', and 'Share' buttons, and a comment input field. On the right side, there are three sections: 'Records (2)' with a dropdown arrow, 'Files (0)' with a dropdown arrow, and 'Members (2)' with a dropdown arrow. The 'Records' section shows a record for 'User Conference - Jun 17-19, 2017 Campaign' with a sub-entry 'Burlington Textiles Corp of America - New Opportunity'. The 'Members' section shows two members: 'Rakesh Gupta' and 'Test User'. A red arrow points from the 'Share' button of the post to the 'Records' section.

Choose Object and Specify When to Start the Process



Object *

Account ▼

Start the process *

only when a record is created

when a record is created or edited

Advanced

Recursion - Allow process to evaluate a record multiple times in a single transaction? ⓘ

Yes

Save Cancel

Define Criteria for this Action Group



Criteria Name *

Only for out of business accounts

Criteria for Executing Actions *

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

Set Conditions

	Field *	Operator *	Type *	Value *	
1	[Account].RakeshGupta__out_of_business__c	Equals	Boolean	True	×

+ Add Row

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?

Yes

Save

Cancel

Select and Define Action



Action Type *

Apex

Action Name * ?

Delete open cases

Apex Class * ?

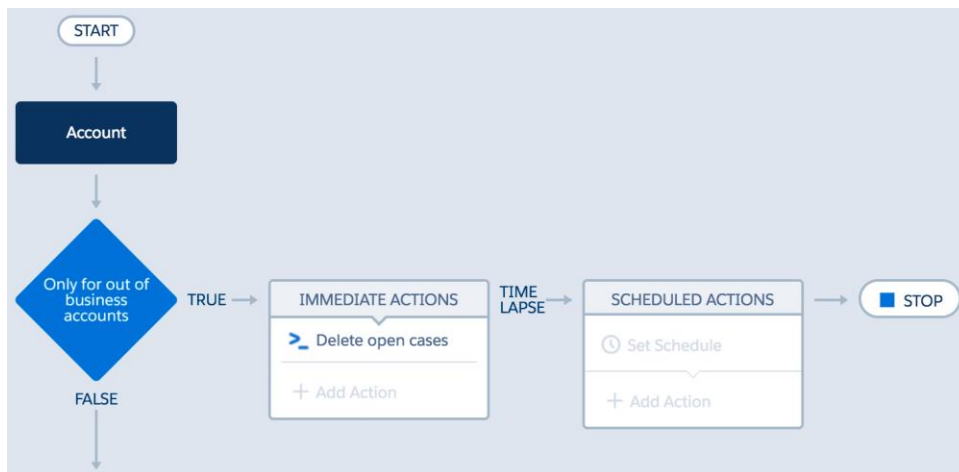
RakeshGupta__DeleteOpenCa:

Set Apex Variables

Field *	Type *	Value *
AccountIds	Reference	[Account].Id

+ Add Row

Save Cancel



Burlington Textiles Corp of America - New + Follow Edit New Contact New Case

Type Phone Website Account Owner **Rakesh Gu...** Account Site Industry

RELATED **DETAILS**

Account Owner Rakesh Gupta	Created By Rakesh Gupta, 3/8/2017 3:28 AM
Account Name Burlington Textiles Corp of America - New	Rating
Parent Account	out of business <input type="checkbox"/>
Account Number	Phone
Account Site	Fax
Type	Website
Industry	Ticker Symbol
Annual Revenue	Ownership

Cases (2)

00001037
Status: Working
Subject:
Date Opened: 3/10/2017 2:03 AM

00001036
Status: New
Subject:
Date Opened: 3/10/2017 2:03 AM

[View All](#)

Opportunities (1)

Burlington Textiles Corp of America - New

Stage: Prospecting
Created Date: 3/8/2017 3:28 AM
Close Date: 7/6/2017

[View All](#)

Burlington Textiles Corp of America - New + Follow Edit New Contact New Case

Type Phone Website Account Owner **Rakesh Gu...** Account Site Industry

RELATED **DETAILS**

Account Owner Rakesh Gupta	Created By Rakesh Gupta, 3/8/2017 3:28 AM
Account Name Burlington Textiles Corp of America - New	Rating
Parent Account	out of business <input checked="" type="checkbox"/>
Account Number	Phone
Account Site	Fax
Type	Website
Industry	Ticker Symbol
Annual Revenue	Ownership

Cases (0)

Opportunities (1)

Burlington Textiles Corp of America - New

Stage: Prospecting
Created Date: 3/8/2017 3:28 AM
Close Date: 7/6/2017

[View All](#)

Assets (0)

Contracts (0)

Contacts (0)

Notes & Attachments (0)

Build Formula

Insert:

\$Profile.Name <> 'System Administrator'

By Pass Process Builder

Custom Permission Edit

Information ! = Required Information

Label	<input type="text" value="By Pass Process Builder"/>	Connected App	<input type="text"/>
Name	<input type="text" value="By_Pass_Process_Builde"/>	Protected Component	<input type="checkbox"/>
Description	<input type="text"/>		

Profile [Help for this Page](#)

Supply Chain User

[Profile Overview](#) > **Custom Permissions**

Custom Permissions

Available Custom Permissions	Enabled Custom Permissions
--None--	RakeshGupta.By Pass Process Builder

Choose Object and Specify When to Start the Process

Object *

Start the process *

only when a record is created

when a record is created or edited

∨ Advanced

Recursion - Allow process to evaluate a record multiple times in a single transaction?

Yes

Select a Global System Variable

\$Permission ▶ ▼

By_Pass_Process_Builder

Cancel

Choose

Define Criteria for this Action Group



Criteria Name *

Only for out of business accounts

Criteria for Executing Actions *

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

Build Formula

Insert:

NOT(\$Permission.By_Pass_Process_Builder) && [Account].RakeshGupta_out_of_business_c

Advanced

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

- Yes

Save Cancel Delete

Select and Define Action



Action Type *

Update Records

Action Name *

Update open Opportunities

Record Type *

[Account].Opportunities

Criteria for Updating Records *

- Updated records meet all conditions
- No criteria—just update the records!

Filter the records you update based on these conditions

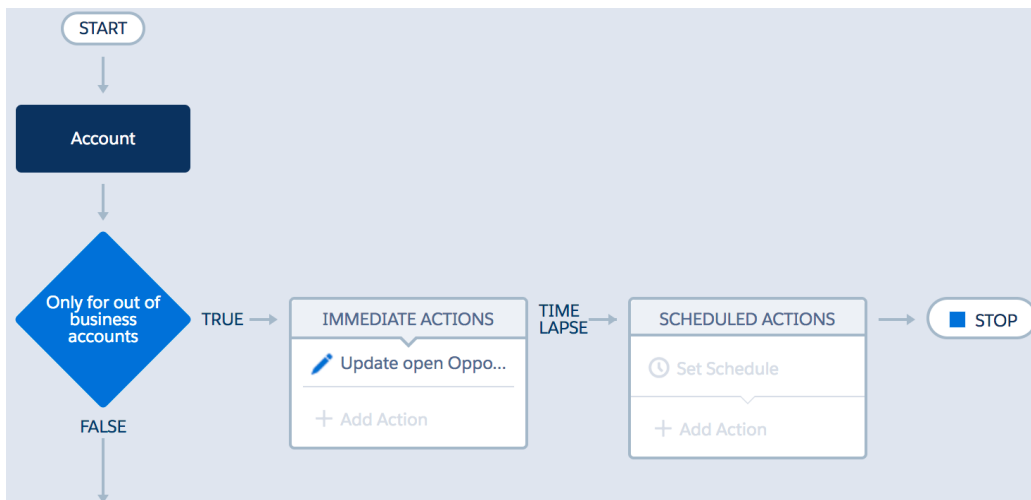
	Field *	Operator *	Type *	Value *	
1	Stage	Does not equal	Picklist	Closed Won	×
+ Add Row					

Set new field values for the records you update

	Field *	Type *	Value *	
	Stage	Picklist	Closed Lost	×
+ Add Row				

Save

Cancel



Subject | You task {!Task.Who} is due on {!Task.ActivityDate}

HTML Preview

Hi There,

You task {!Task.Who} is due on {!Task.ActivityDate}. Below is some key information for you

Assigned By :- {!Task.CreatedBy}

Related To :- {!Task.What}

Due Date :- {!Task.ActivityDate}

Best Regards,

Universal Container Sales Team

Email Alert Edit

Edit Email Alert

Description |

Unique Name |

Namespace Prefix | RakeshGupta

Object |

Email Template |

Protected Component |

Recipient Type | Search: for:

Recipients

Available Recipients

Selected Recipients

Add

Remove

You can enter up to five (5) email addresses to be notified.

Additional Emails

From Email Address |

Define Criteria for this Action Group



Criteria Name *

Only for open tasks

Criteria for Executing Actions *

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

Set Conditions

	Field *	Operator *	Type *	Value *	
1	[Task].Status	Does not equal	Picklist	Completed	
+ Add Row					

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?

Yes

Save

Cancel

Set Time for Actions to Execute

2 Days Before ActivityDate

Days from now.

Select and Define Action



Action Type *

Email Alerts

Action Name *

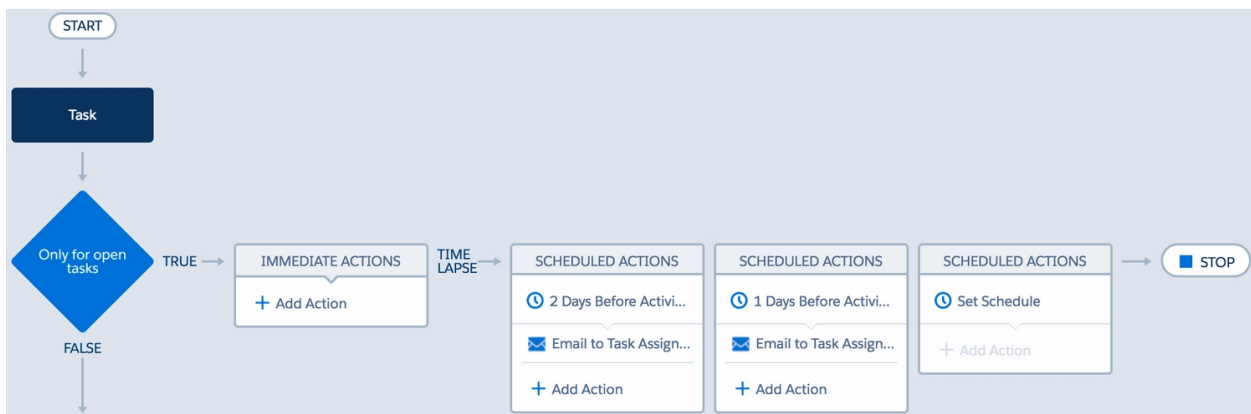
Email to Task Assignee - 2 Days

Email Alert *

Email_to_Task_assignee

Select an existing email alert for the object that this process is associated with. If none exist, [create one](#).

Save Cancel



You task 003B0000002zlyd is due on 3/8/2017



Inbox x

Universal Container via ws5kmr95 7:43 PM (1 minute ago) ☆

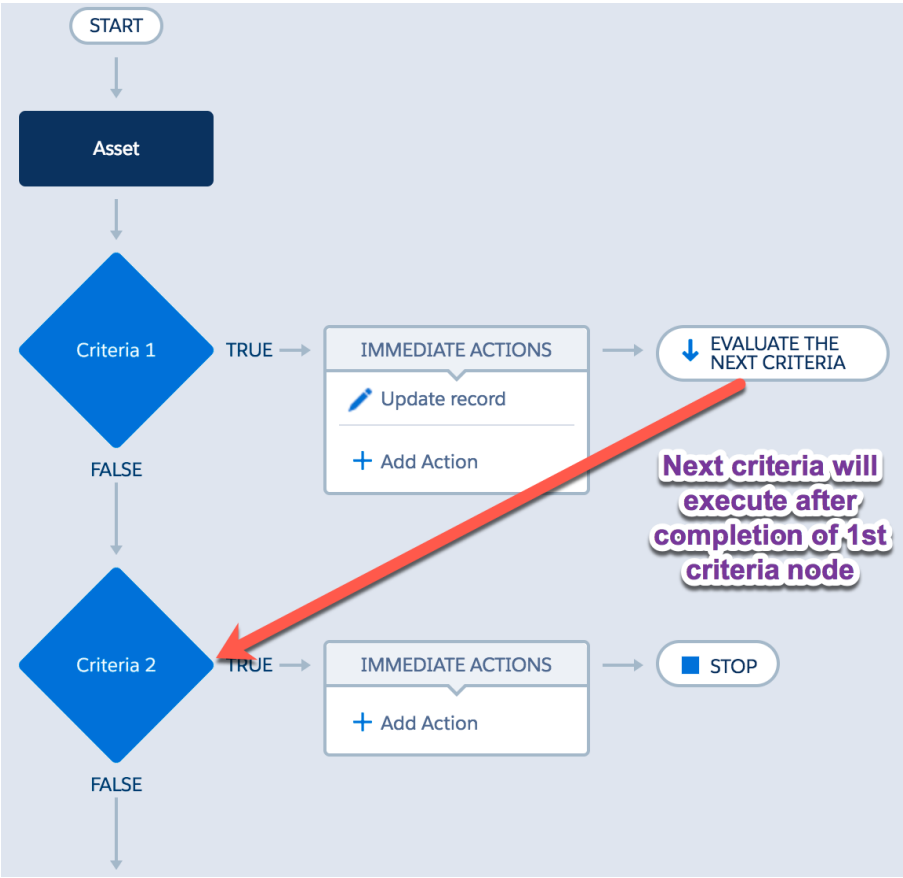
to me

Hi There,

You task 003B0000002zlyd is due on 3/8/2017. Below is some key information for you

Assigned By :- Rakesh Gupta
Related To :- 001B000000OLVHi
Due Date :- 3/8/2017

Best Regards,
Universal Container Sales Team



Define Criteria for this Action Group



Criteria Name ^{*}

Update eligible for bonus

Criteria for Executing Actions ^{*}

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

Build Formula

Insert:

```
[Task].ActivityDate - TODAY() >=5 && [Task].IsClosed
```

Advanced

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

Yes

Save

Cancel

Delete

Select and Define Action



Action Type*
Update Records

Action Name* ⓘ
Update Eligible for bonus to true

Record Type*
[Task]

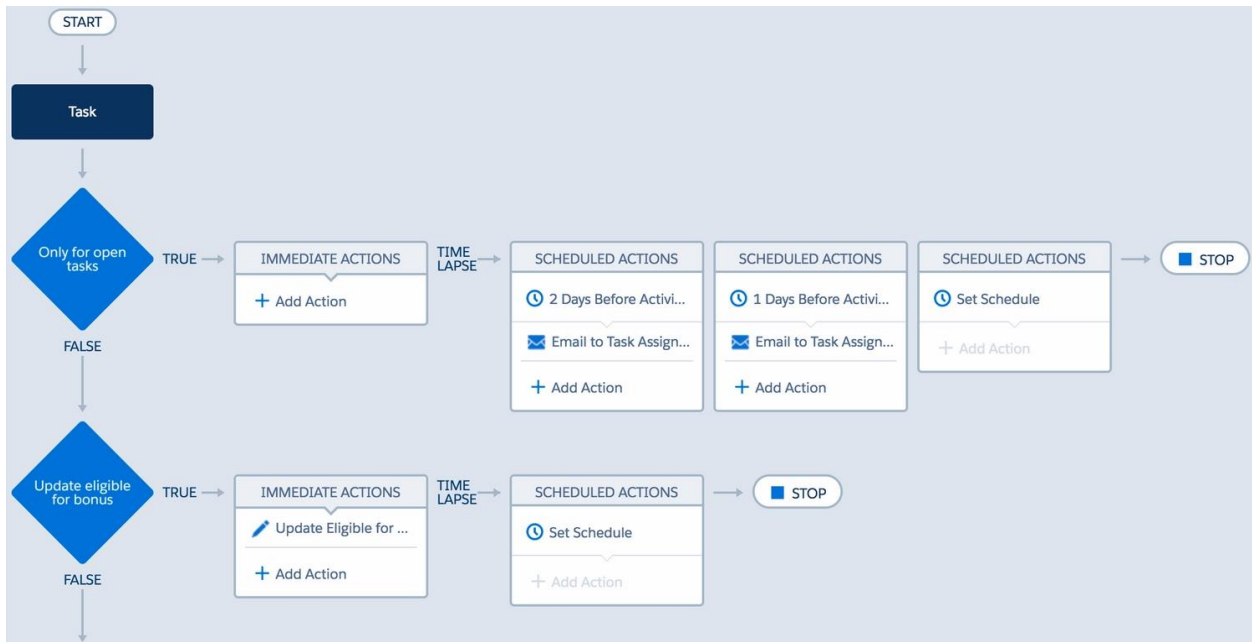
Criteria for Updating Records*
 Updated records meet all conditions
 No criteria—just update the records!

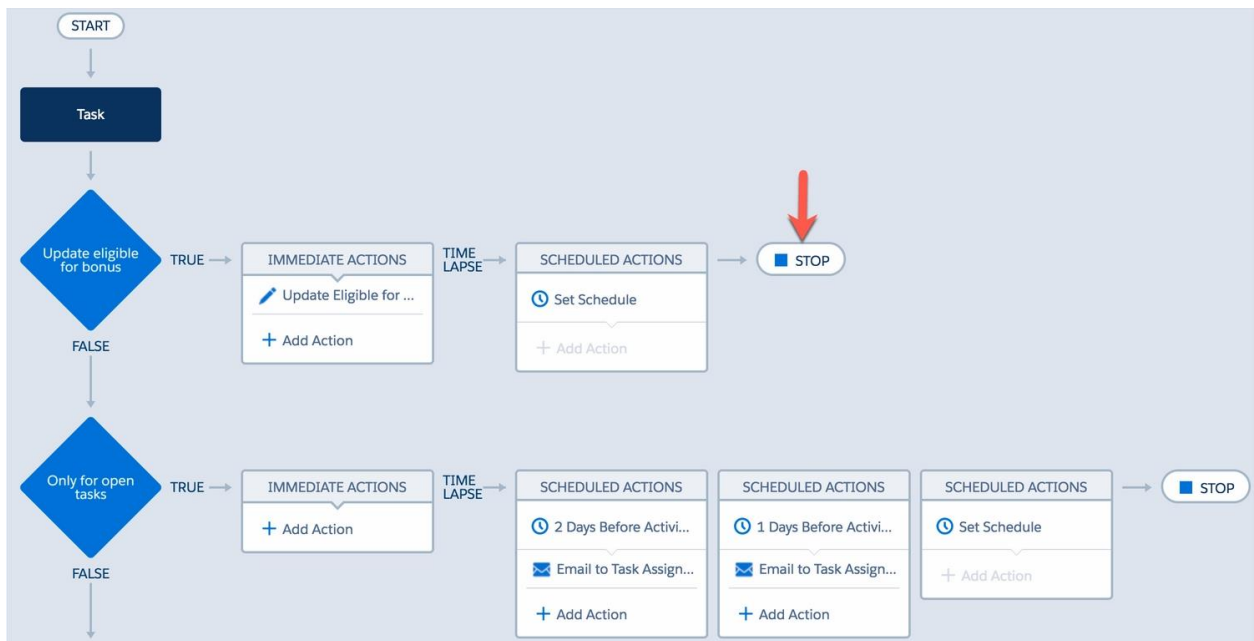
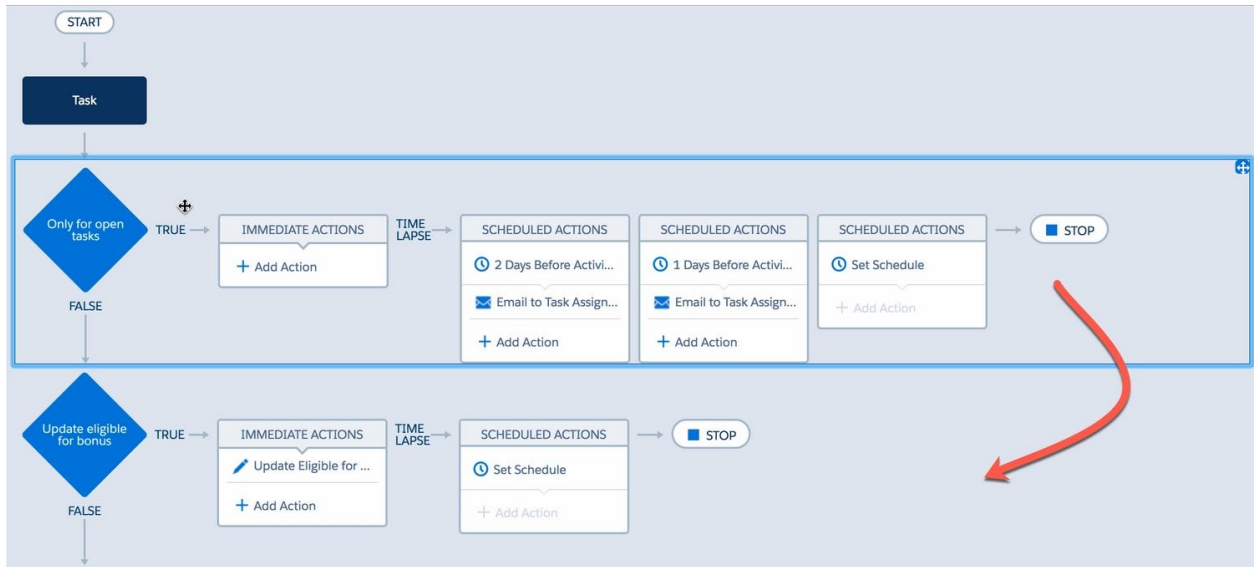
Set new field values for the records you update

Field*	Type*	Value*
Eligible for bonus	Boolean	True

+ Add Row

Save Cancel





Specify What Happens After Evaluating This Criteria

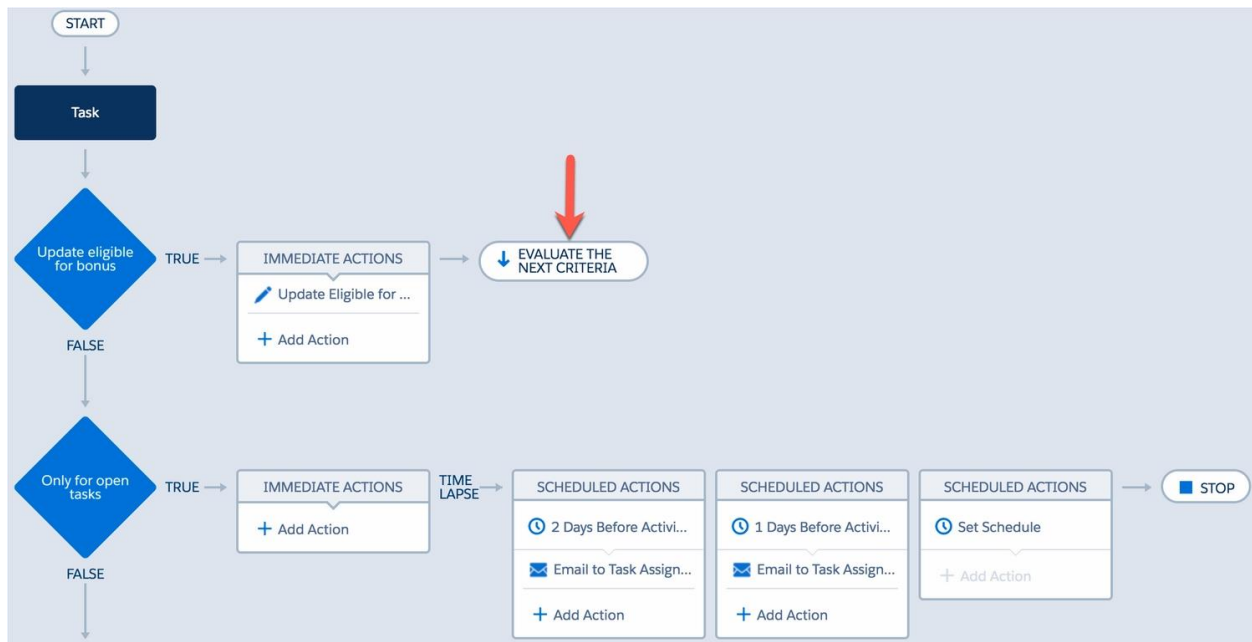


When this criteria is true and the process executes the associated action group, what should happen next? *

- Stop the process
- Evaluate the next criteria

Save

Cancel



Choose Object



This process starts when another process invokes it.

Select an object to associate with the process*

Opportunity



Save

Cancel

Define Criteria for this Action Group



Criteria Name *

Only for open opportunity

Criteria for Executing Actions *

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

Set Conditions

	Field *	Operator *	Type *	Value *	
1	[Opportunity]... Q	Does not equal	Picklist	Closed Won	×
+ Add Row					

Conditions *

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

Save

Cancel

Select and Define Action



Action Type*
Update Records

Action Name* ⓘ
Stage to Closed Lost

Record Type*
[Opportunity]

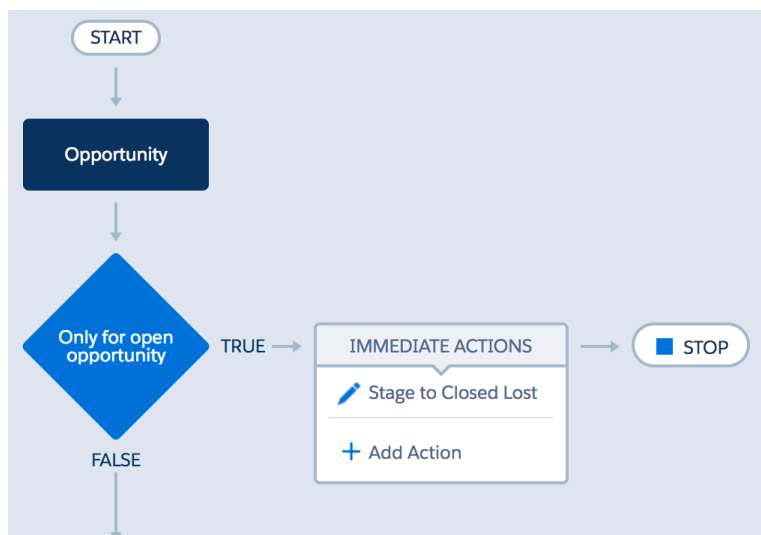
Criteria for Updating Records*
 Updated records meet all conditions
 No criteria—just update the records!

Set new field values for the records you update

Field*	Type*	Value*
Stage	Picklist	Closed Lost

+ Add Row

Save Cancel



Define Criteria for this Action Group



Criteria Name*

Only for denied quotes

Criteria for Executing Actions*

- Conditions are met
- Formula evaluates to true
- No criteria—just execute the actions!

Set Conditions

	Field*	Operator*	Type*	Value*	
1	[Quote].Status	Equals	Picklist	Denied	
+ Add Row					

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?

Yes

Save

Cancel

Select and Define Action



Action Type *
Processes

Action Name * ⓘ
Launch opportunity invocable proc

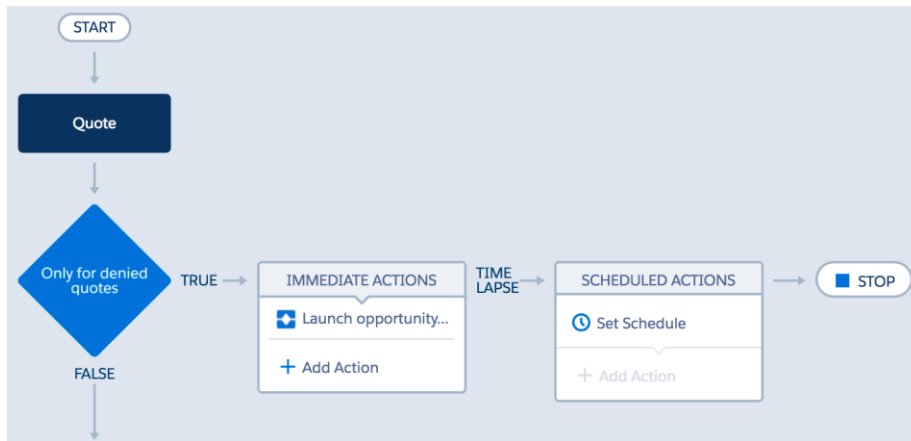
Process * ⓘ
Update Opportunity Stage

Set Process Variables

Process Variable *	Type *	Value *
SObject	Reference	[Quote].Opportunity

+ Add Row

Save Cancel



OPPORTUNITY
Burlington Textiles Corp of America

+ Follow Edit New Case New Note

Account Name: Burlington Textiles Corp of America | Close Date: 6/19/2015 | Amount: \$2,000,000.00 | Opportunity Owner: Rakesh Gu...

Prospecting > Qualificati... > Needs Ana... > Value Prop... > Id. Decisio... > Perception... > Proposal/P... > Negotiatio... > **Closed Lost** Change Closed Stage

ACTIVITY **CHATTER** **DETAILS**

Opportunity Owner	Rakesh Gupta	Amount	\$2,000,000.00
Private	<input type="checkbox"/>	Expected Revenue	\$0.00
Opportunity Name	Burlington Textiles Corp of America	Close Date	6/19/2015
Account Name	Burlington Textiles Corp of America	Next Step	
Type		Stage	Closed Lost
Lead Source		Probability (%)	0%
Demo request contact		Primary Campaign Source	

Quotes (1)

00000002

Status: Denied

Quote Name: Burlington Textiles Corp of America

Syncing:

[View All](#)

Groups (0)

Products (0)

Notes & Attachments (0)

Contact Roles (0)

Custom Metadata Type Chatter Post

[Help for this Page](#)

[Standard Fields \(6\)](#) | [Custom Fields \(1\)](#) | [Validation Rules \(0\)](#) | [Page Layouts \(1\)](#)

Custom Metadata Type Detail

[Edit](#) [Delete](#) [Manage Chatter Posts](#)

Singular Label	Chatter Post	Description	
Plural Label	Chatter Posts	Visibility	Public
Object Name	Chatter_Post	Record Size	192
Namespace Prefix	RakeshGupta		
API Name	RakeshGupta__Chatter_Post__mdt		
Created By	Rakesh Gupta, 3/8/2017 8:06 AM	Modified By	Rakesh Gupta, 3/8/2017 8:06 AM

Standard Fields

[Standard Fields Help](#)

Action	Field Label	Field Name	Data Type	Indexed
	<u>Created By</u>	CreatedBy	Lookup(User)	
Edit	<u>Custom Metadata Record Name</u>	DeveloperName	Text(40)	
Edit	<u>Label</u>	MasterLabel	Text(40)	
	<u>Last Modified By</u>	LastModifiedBy	Lookup(User)	
Edit	<u>Namespace Prefix</u>	NamespacePrefix	Text	
Edit	<u>Protected Component</u>	IsProtected	Checkbox	

Custom Fields

[New](#)

[Custom Fields Help](#)

Action	Field Label	API Name	Data Type	Field Manageability	Indexed	Controlling Field	Modified By
Edit Del	<u>banned word</u>	RakeshGupta__banned_word__c	Text(51) (Unique Case Insensitive)	Upgradable	<input checked="" type="checkbox"/>		Rakesh Gupta, 3/8/2017 8:06 AM

Chatter Posts

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Action	Label ↑	banned word
Edit Del	1	Idiot
Edit Del	2	Stupid
Edit Del	3	ISIS

Record Lookup

Use filters to find a specific record, then assign its fields to flow variables.

General Settings

Name *

Unique Name * 
[Add Description](#)

Filters and Assignments


Look up * ▾ that meets the following criteria:

Field	Operator	Value	
<input type="text" value="Id"/> ▾	<input type="text" value="equals"/> ▾	<input type="text" value="{!VarT_FeedItemID}"/> ▾	


[Add Row](#)

Sort results by: ▾ ▾

Assign the record's fields to variables to reference them in your flow.

Field	Variable	
<input type="text" value="Body"/> ▾	<input type="text" value="{!VarT_Feedbody}"/> ▾	

[Add Row](#)

 Assign null values to the variable(s) if no records are found.

Fast Lookup

Use filters to look up Salesforce records. Assign fields from a single record to an sObject variable or fields from multiple records to an sObject collection variable.

General Settings

Name *

Unique Name * 

[Add Description](#)

Filters and Assignments


Look up * that meets the following criteria:

Field	Operator	Value	
<input type="text" value="banned_word__c"/>	<input type="text" value="does not equal"/>	<input type="text" value="{!\$GlobalConstant.EmptyString}"/>	

[Add Row](#)

Sort results by:

Variable *

 Assign null to the variable if no records are found.

Specify which of the record's fields to save in the variable.

Fields	
<input type="text" value="banned_word__c"/>	

[Add Row](#)

Decision



Configure how users move through the flow by setting up conditions for each decision outcome.

General Settings

Name *

Unique Name *

[Add Description](#)

Outcomes

Drag to reorder outcome execution

EDITABLE OUTCOMES

Not Null

[Add Outcome](#)

DEFAULT OUTCOME

Not Exist

Create an outcome. You can then select it when you draw a connector out from this decision.

Name *

Unique Name *

Resource	Operator	Value
<input type="text" value="{!SOCVBannedWords}"/>	<input type="text" value="is null"/>	<input type="text" value="{!\$GlobalConstant.False}"/>

[Add Condition](#) |

Loop



Select a collection to iterate through in the specified order.

General Settings

Name *

Unique Name *

[Add Description](#)

Assignments

Loop through * in order

Assign the current value to a variable to reference the value in your flow.

Loop Variable *

Record Create

Select the type of record you want to create, then insert flow values into its fields.

General Settings

Name *

Unique Name * [i](#)

[Add Description](#)

Assignments

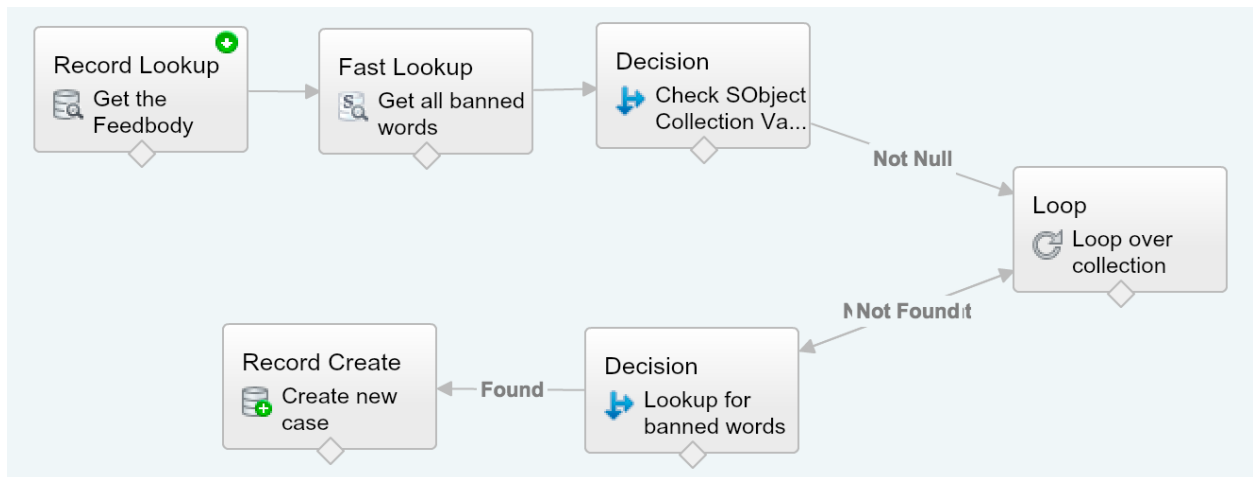
Create * with the following field values:

Field	Value	
<input type="text" value="Description"/>	<input type="text" value="Banned word :- {!VarT_FeedItemID}"/>	🗑
<input type="text" value="Origin"/>	<input type="text" value="Email"/>	🗑
<input type="text" value="Status"/>	<input type="text" value="Escalated"/>	🗑
<input type="text" value="Type"/>	<input type="text" value="Other"/>	🗑

[Add Row](#)

Assign the record ID to a variable to reference it in your flow.

Variable



Choose Object and Specify When to Start the Process



Object*

Feed Item

Start the process*

only when a record is created

when a record is created or edited

Advanced

Recursion - Allow process to evaluate a record multiple times in a single transaction? ⓘ

Yes

Save Cancel

Define Criteria for this Action Group



Criteria Name* ⓘ

Type equals to TextPost

Criteria for Executing Actions*

Conditions are met

Formula evaluates to true

No criteria—just execute the actions!

Set Conditions

	Field	Operator*	Type*	Value*
1	[FeedItem].Type	Equals	Picklist	Text Post

+ Add Row

Conditions*

All of the conditions are met (AND)

Any of the conditions are met (OR)

Customize the logic

Save Cancel

Select and Define Action



Action Type *

Flows

Action Name *

Launch a Flow

Flow *

Custom metadata type in Flow

Select an existing flow. If none exist, [create one](#).

Set Flow Variables

Flow Variable *	Type *	Value *
VarT_FeedItemID	Reference	[FeedItem].Id
+ Add Row		

Save

Cancel



Rakes Gupta
Just Now



1 Chatter Post

Idiot #FlowTest

Like Comment Share



Write a comment...



CASE

Priority: **Medium**
Status: **Escalated**
Case Number: **00001034**

2 New Case

FEED RELATED

Case Owner

Rita Zonius



Status

Escalated



Case Number

00001034

Priority

Medium



Contact Name



Case Origin

Email



Type

Other



Description

Banned word :- 0D5B000000ReeWcKAJ



Case Reason



Date/Time Opened

3/8/2017 10:35 AM