



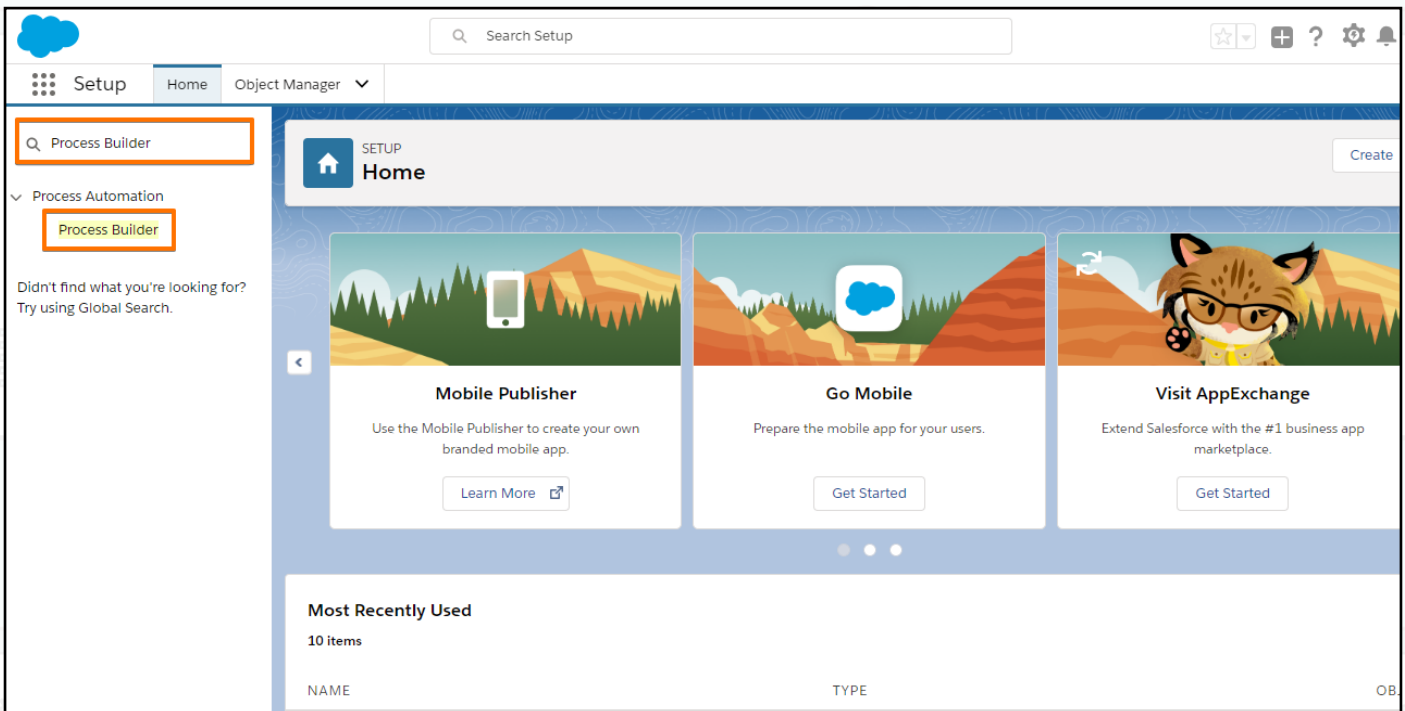
PIN **Tags**

Automated Tagging

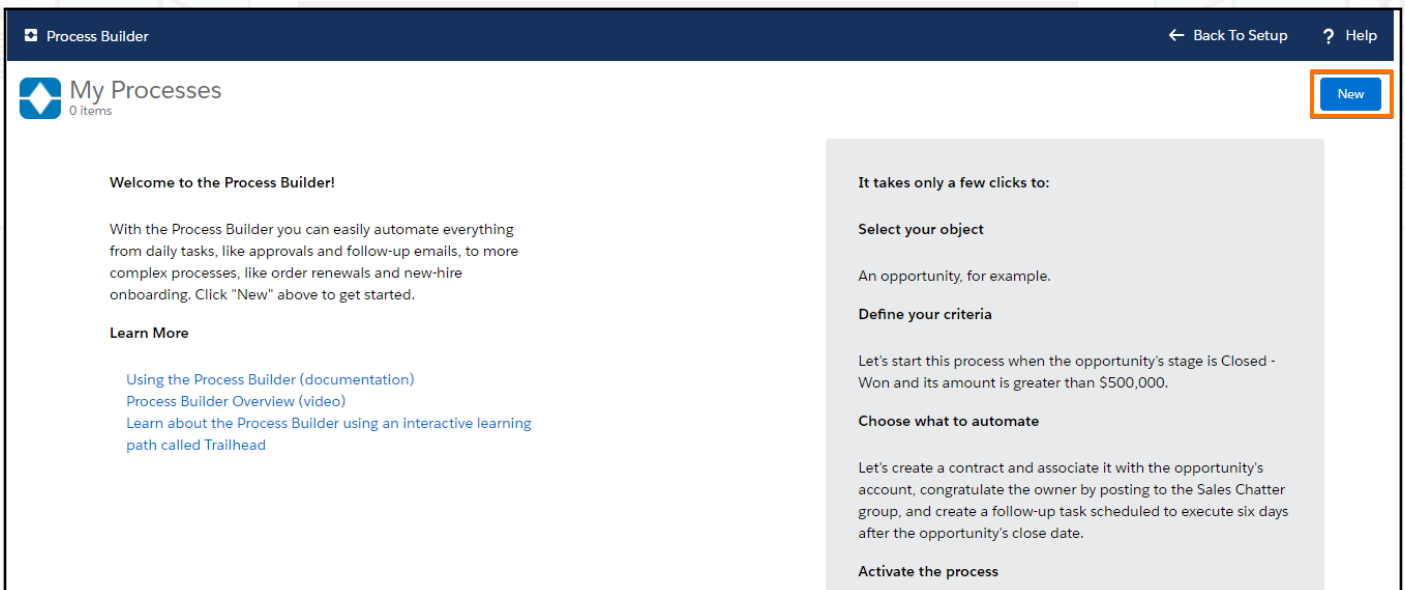


Powered By Cloud Analogy

1. From Setup, enter Process Builder in the Quick Find box, select **Process Builder**.



2. Click on **New**.



3. Name the process [Add Tag].The API name updates itself after filling the Name. Configure the process to start when a record changes.



Process Builder

My Processes
0 Items

Welcome to the Process Builder

With the Process Builder, you can automate daily tasks, like approvals and data updates, by creating processes, like order renewal, that run automatically. Click "New" above to get started.

Learn More

Using the Process Builder, you can create a process that runs automatically. For example, you can create a process that runs when a record is created or updated. Learn about the Process Builder and the Trailhead path called Trailhead: Automate Your Processes.

New Process

Process Name*

API Name*

Description

The process starts when*

Cancel Save

You're done!

4. Click Save.

Add Object:

1. Click Add Object. For Object, Select the required Object. Select when a record is created or edited and Click Save.

Process Builder - Add Tag

Expand All Collapse All

View All Processes Clone Edit Properties Activate

START

+ Add Object

+ Add Criteria

TRUE

IMMEDIATE ACTIONS

+ Add Action

TIME LAPSE

SCHEDULED ACTIONS

Set Schedule

+ Add Action

STOP

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

Save Cancel

Add Criteria:

1. Click Add Criteria. Name the criteria [Filter Criteria]. Set the conditions to filter the records accordingly to add tags to them and Click Save



Process Builder - Add Tag

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Account

+ Add Criteria

TRUE

IMMEDIATE ACTIONS

+ Add Action

STOP

FALSE

STOP

Define Criteria for this Action Group

Criteria Name *
Check the name for "SFDC"

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].Name	Equals	String	SFDC

+ Add Row

Conditions *
☒ All of the conditions are met (AND)
☐ Any of the conditions are met (OR)

Save Cancel

Set conditions to filter the records

Add Action(Immediate Action)

- Under Immediate Actions, click Add Action. For the action type, select Create a Record. Name the action "Create Lightning Tag". For Record Type, select "Lightning Tag". When you select the object that you want to create a record for, Process Builder displays rows for the required fields.

Process Builder - Add Tag

Expand All Collapse All View All Processes Clone Edit Properties Activate

START

Account

Check the name for "SFDC"

TRUE

IMMEDIATE ACTIONS

+ Add Action

STOP

FALSE

+ Add Criteria

TRUE

IMMEDIATE ACTIONS

+ Add Action

STOP

FALSE

Select and Define Action

Action Type *
Create a Record

Action Name *
Add Tag

Record Type *
Lightning Tag

Set Field Values

Field *	Type *	Value *
Lightning Tag Parent	ID	a030o000011Nmyr
Object API Name	String	Account
Record Id	Field Reference	[Account].Id
Record Name	Field Reference	[Account].Name

Save Cancel

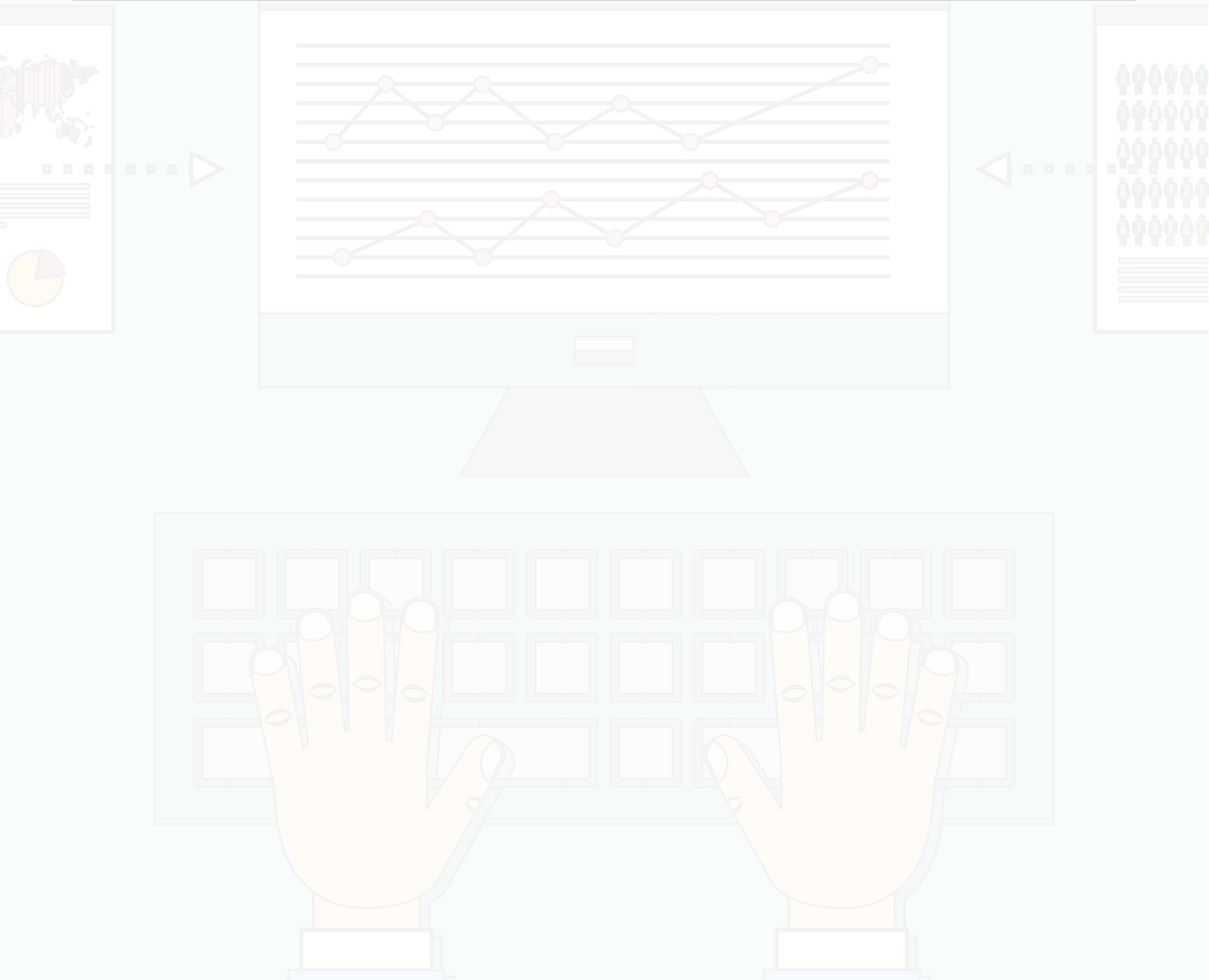
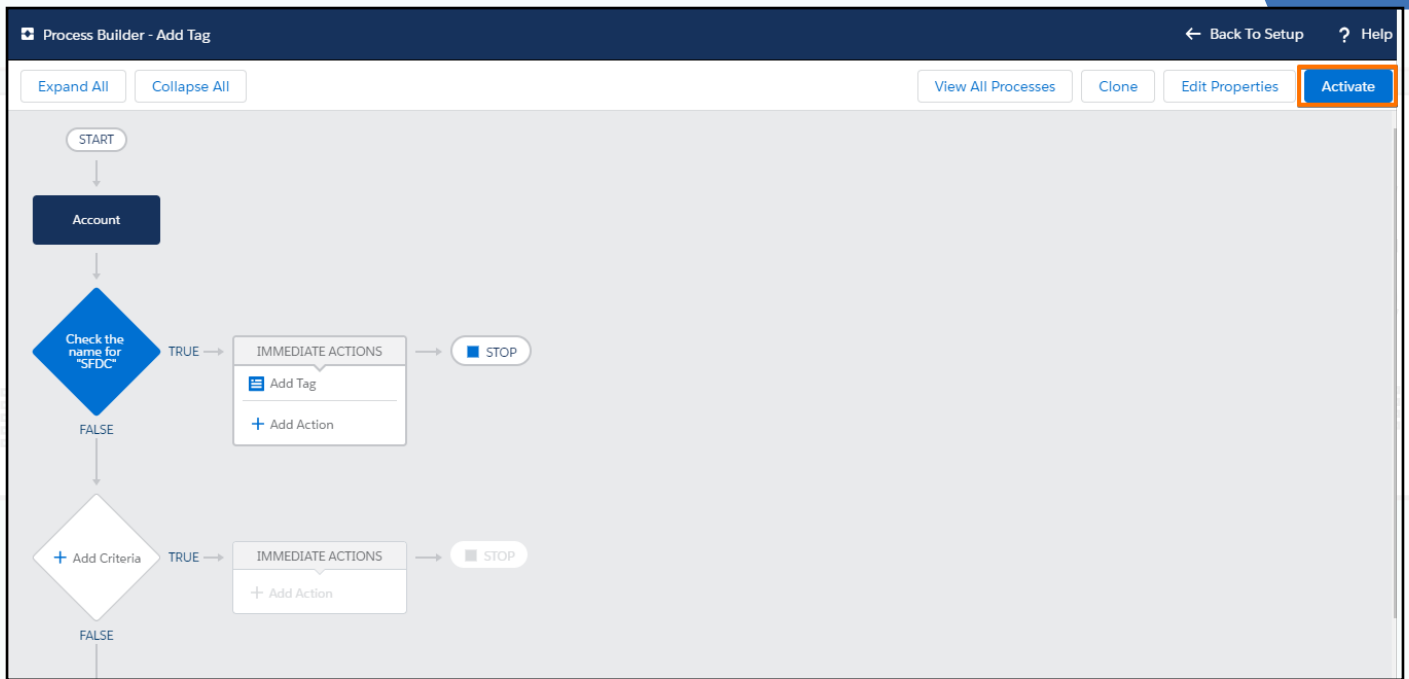
* Information to fill the fields.



1. Go to the "Pin Tags" App. Click on "Lightning Tags Parent" Tab. Go to the details page of the Tag you would like to add and copy the Id from url.

2. Fill other fields as required(see screenshot).

3. Activate the Process Builder and you are done.





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THANK YOU

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