

from Process Builder → to Lightning Flow

Update Records - Part I

Flow is more similar to Process Builder than you might think!

Action Type*

Update Records

Action Name* ⓘ

Shipping = Billing

Record Type*

[Account]



New Assignment

* Label assign_ShippingAddress

* API Name assign_...

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

Use an Assignment when updating the record that started your process and give it a name. We don't use Update element because with a Before Record Trigger, the record hasn't been saved yet.

Set new field values for the records you update

Field*	Type*	Value*
Shipping Street	Field Reference	[Account].BillingStreet
Shipping City	Field Reference	[Account].BillingCity
Shipping State/Province	Field Reference	[Account].BillingState
Shipping Zip/Postal Code	Field Reference	[Account].BillingPost...

+ Add Row

Assign the field values

\$Record is your friend! It is the record that triggered the flow and has all the fields pre-defined for you.

Set Variable Values

Each variable is modified by the operator and value combination.

Variable	Operator	Value
{!\$Record.ShippingStreet}	Equals	{!\$Record.BillingStreet}
{!\$Record.ShippingCity}	Equals	{!\$Record.BillingCity}
{!\$Record.ShippingState}	Equals	{!\$Record.BillingState}
{!\$Record.ShippingPostalCode}	Equals	{!\$Record.BillingPostalCode}

Extra Tidbit:

- Use a Before Record is Saved Trigger for this type of Record Update
- \$Record is a pre-defined Global Variable. It works very similar to Process Builder; just select \$Record and then the field you want to update.

