

from Process Builder → to Lightning Flow

Create a Record

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

Action Type *

Create a Record

Action Name * ⓘ

Create Task

Record Type *

Task



How Many Records to Create

One

Multiple

How to Set the Record Fields

Use all values from a record

Use separate resources, and literal values

Create a Record of This Object

* Object

Task

Field *	Type *	Value *
Assigned To ID	Formula	{!\$User.Id}
Priority	Picklist	Normal
Status	Picklist	Completed
Due Date Only	Formula	TODAY()
Subject	String	Sent Material
Task Subtype	Picklist	Task
Related To ID	Field Reference	[Account].Id

With Flow, we can create multiple records, but for today, let's just select One and Use separate resources and values.

Assign the field values

Set Field Values for Task

Field	Value
OwnerId	{!fxUserId}
Priority	Normal
Status	Completed
ActivityDate	{!fxToday}

fxUserId ⓘ

* Data Type ⓘ

Text

* Formula

Insert a resource...

{!\$User.Id}

We're using a new variable type called a Formula. They work very similar to how they did in Process Builder so try it out!

Extra Tidbit:

- Use an After the Record is Saved for this type of Record Update.

