

ARCHIVED - Process Builder Naming Conventions

Process Builder is old, decrepit, and deprecated.

You can't create new ones, and if you're editing old ones you should be migrating to Flows instead.

This is ARCHIVED content, will never be updated, and is here for history reasons.

1. A Process Builder name **SHALL** always start by `PB`, followed by a number corresponding to the number of process builders in the Organization, followed by an underscore.
 - a. If the Process Builder Triggers other Process Builders, it **SHALL** always start by `TPB` instead.
 - b. If the Process Builder is Invoked by other Process Builders, it **SHALL** always start by `IPB` instead.
2. The end of a Process Builder name **SHOULD** always be:
 - the name of the object, in the case of a Triggering Process Builder (TPB)
 - the action carried out, in the case of an Invoked Process Builder (IPB)
 - the trigger and action, in the case of a standalone Process Builder (PB)
3. A Process Builder name **COULD** contain either `C`, `CE`, or `CES` wrapped by underscores, to show if the PB triggers on Creation, Creation and Edition, or Subsequent Modifications that Fill Criteria. The default assumed setting is `CE` if none is written. *3
4. All Process Builder Triggers MUST have a description detailing their purpose.
5. A Process Builder Decision Diamond **SHALL** be named after the criteria that are used in the most precise manner possible.
6. A Process Builder Action **SHALL** be named after the action being carried out in the most precise manner possible.

Type	Name	Description
Process Builder	TPB01_Oppportunity	This Process Builder invokes all invocable Opportunity Process builders
Process Builder	IPB01_SetOwnerTarget	Copies over target from Owner to calculate monthly efficiency
Process Builder	PB01_ContactBirthdatEmail	Sends a birthday email on the contact's birthday.
Decision Diamond	Status is "Approved"	#N/A

Type	Name	Description
Action	Sets Contact Scoring to 10	#N/A
Process Builder (possible variation)	TPB01_Opportunity	This Process Builder invokes all invocable Opportunity Process builders. Also Handles various actions such as birthday emails.

Revision #3

Created 9 September 2019 21:49:50 by Windyo

Updated 10 August 2023 08:25:15 by Windyo