

Increase Productivity with Visual Workflow

Wednesday, October 14, 2015 3:14 PM

1. Understand the capabilities and uses cases of Visual Workflow.
2. Build and deploy a flow that automates a business process.

Visual Workflow - A tool used to automate complex business processes and increase productivity.

Can be used to:

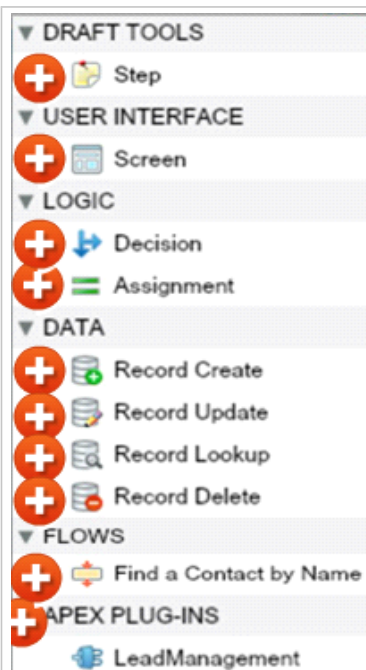
- a. Execute business rules and logic in the flow
- b. Calculating complex formulas
- c. Query and update SF data.

Building a Flow in Cloud Flow Designer

Setup -> Create -> Workflows & Approvals -> Flows

Elements - basic building blocks of flows. Each element represents an action (i.e. collecting information from a flow user).

In order to open a flow in the Cloud Flow Designer, users must have the "Manage Force.com Flow" profile permission.



1. Step

- a. Placeholder to use to quickly sketch out a flow.

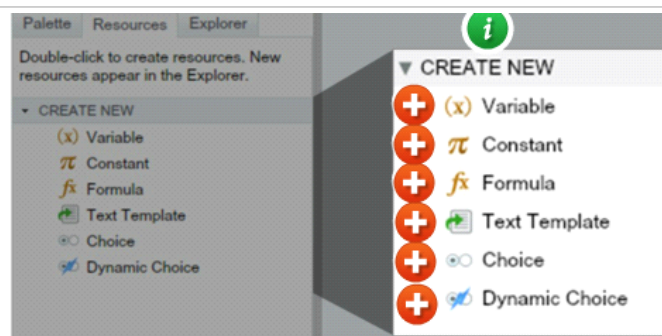
2. Screen

- a. Provides a user-facing screen that can be used to collect input or display output.

3. Decision

- a. Uses conditions to determine where to route users next in the flow.

4. Assignment



1. Variable

- a. Allows you to define an updateable value.
- b. Variables can be used to set and store SF data when running the flow. They can be modified during execution of the flow.

2. Constant

- a. Allows you to define a fixed value. They can be used to set variables and Salesforce data when running the flow. Constants cannot be modified during execution of the flow.

3. Formula

- a. Calculates a value using numeric elements in your flow.

4. Text Template

- a. Allows you to create formatted text that you want to share across your flow.

5. Choice

- a. Creates an individual choice option that you can reuse throughout your flow.

6. Dynamic Choice

- a. Dynamically generates choices from a SF object.

- a. Changes the value of a variable.

5. Record Create

- a. Create a new record in SF using values from your flow.

6. Record Update

- a. Updates a set of records in SF using values from your flow.

7. Record Lookup

- a. Finds a record in SF and stores the values from its fields into variables in your flow.

8. Record Delete

- a. Deletes records from SF that match certain criteria.

9. Subflow

- a. References another flow and calls that flow at runtime. Subflows allow you to reduce the complexity of a flow by reusing other flows.

10. Apex Plug-ins

- a. Represents a piece of Apex code that you can call from the flow. Apex code allows you to add complex business logic to the flow, such as converting a lead or sending an email.

Displaying Faults for Data Elements

By default, the user who reproduced the fault will get an "unhandled fault" message.

Admins can create a Screen element to display the actual error instead of the "unhandled fault" message.

You can use debug logs to troubleshoot issues with flows.

Subflow

Subflows allow you to pass values into the referenced flow and return values from the referenced flow.

Setting the Variable Type

The **Input / Output Type** for a variable can be Private, Input Only, Output Only, or Input and Output. Default value is Private.

Output Only allows the variable's value to be accessed from a referenced flow or from Visualforce controllers.

Input Only allows the variable's value to be set at the start of the flow using subflow inputs, URL parameters, or Visualforce controllers.

Only 1 version of the flow can be active at a time.



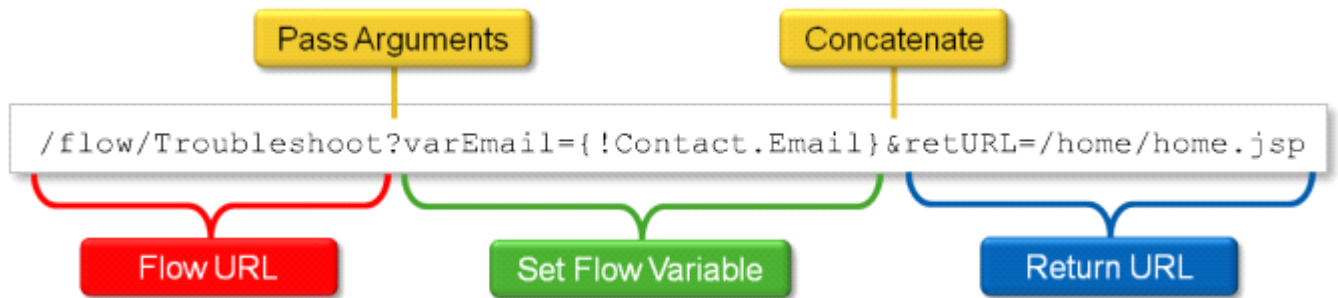


Workflow Guide

Deploy a workflow

Users with the "Run Flows" permission can run flows.
Developers can develop a Visualforce page to deploy a flow.

Salesforce URLs



When the flow is called, the Active Version is run.
Pass Arguments go into the flow.
Concatenate for multiple arguments.

Download the "Cloud Flow Designer Workbook" & "Visual Workflow Getting Started Pack" from the AppExchange.