Development: Implementing Business Processes

Lesson 16: Implementing Business Processes

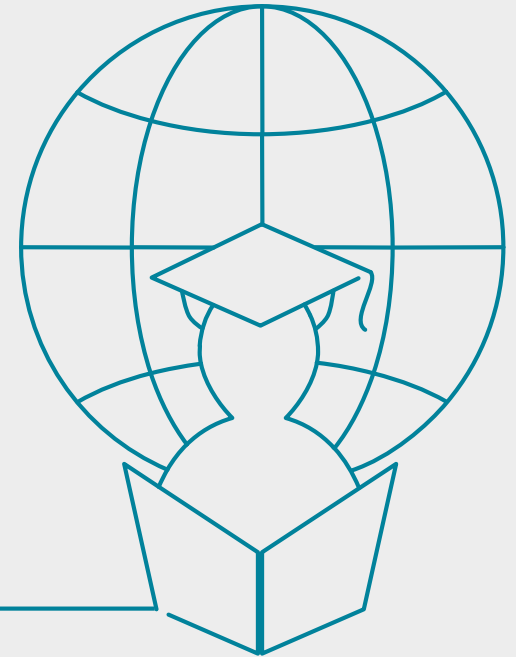# Lesson Objectives

By the end of this lesson, you will be able to:
- Describe what can be done with Visual Workflow
- Explain the basics of building a flow in the Cloud Flow Designer

16.1: Visual Workflow Overview
Automating Business Processes

Workflow Rules

Automate specific actions

- Assign a task
- Send an email
- Update a field value
- Send an outbound message

Approval Processes

Automate approving a record

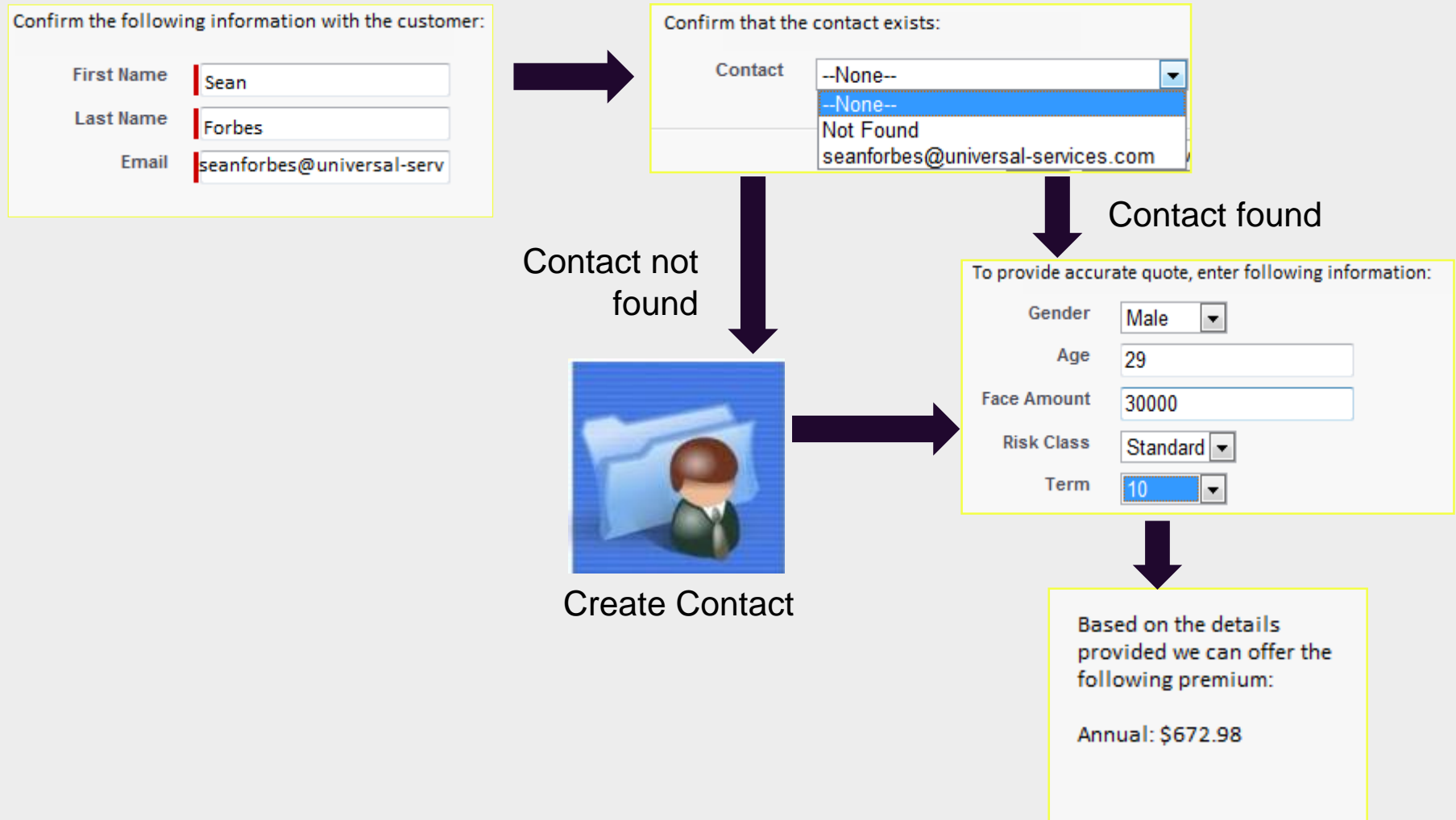- Define steps for approval
- Assign approver for each step

Visual Workflow

Automate complex business processes

- Navigate users through screens
- Execute business rules
- Query and update Salesforce data
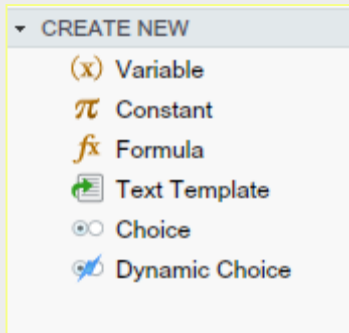
16.1: Visual Workflow Overview
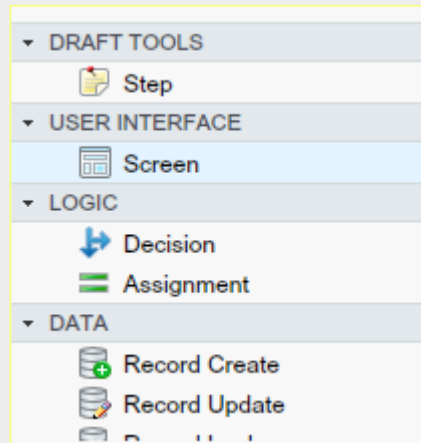## What is Visual Workflow?

Confirm the following information with the customer:

First Name	Sean
Last Name	Forbes
Email	seanforbes@universal-serv

Confirm that the contact exists:

Contact	--None--
	--None--
	Not Found
	seanforbes@universal-services.com

Contact found

Contact not found

Create Contact

To provide accurate quote, enter following information:

Gender	Male
Age	29
Face Amount	30000
Risk Class	Standard
Term	10

Based on the details provided we can offer the following premium:

Annual: $672.98

16.1: Visual Workflow Overview
Building a Flow in Cloud Flow Designer

Define Resources	Add Elements	Connect Elements	Set Start Element

Define Resources

- ▼ CREATE NEW
  - (x) Variable
  - π Constant
  - ƒx Formula
  - Text Template
  - ◉○ Choice
  - Dynamic Choice

Add Elements

- ▼ DRAFT TOOLS
  - Step
- ▼ USER INTERFACE
  - Screen
- ▼ LOGIC
  - Decision
  - Assignment
- ▼ DATA
  - Record Create
  - Record Update

Connect Elements

Screen — Quality Information

Screen — Bill Summary

Set Start Element
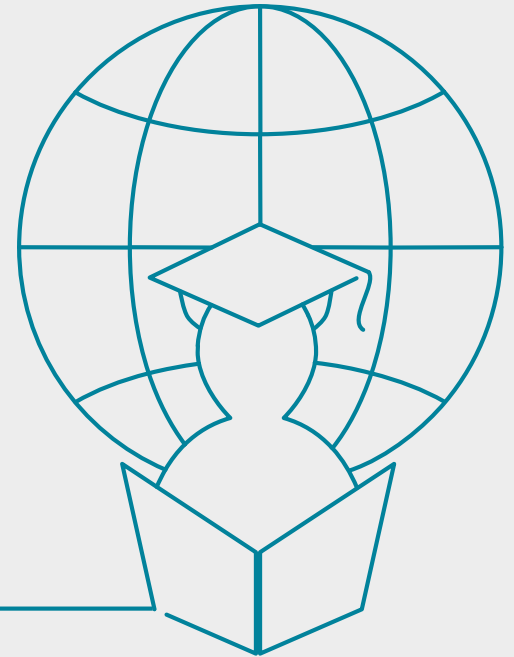
Set as Start element

Screen — Quality Information
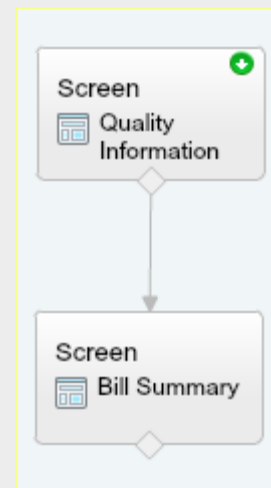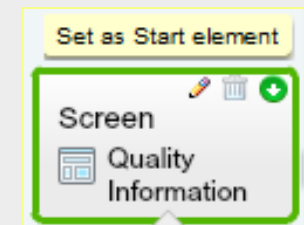
Users with the "Manage Force.com Flow" permission can open flows.

Your Name | Setup | Create | Workflows & Approvals | Flows

- Guided Selling
- Web-to-Lead or Case Enhancement
- Perform Multiple Updates from a Single Screen

Summary

Automating Business Processes
Visual Workflow
Building a Flow in Cloud Flow Designer

What are some use cases for Visual workflow?
What elements can be used to build a flow?