

BUILDING APPLICATIONS WITH FORCE.COM – PART 2 (AUTOMATING BUSINESS PROCESSES USING VISUAL WORKFLOW)

Exercise Guide



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14-1: Create a Flow**Scenario:**

Universal Containers is seeing a number of candidate records missing information. They want a candidate wizard created that includes all the needed information to complete the record.

Goal:

Create a flow using Visual Workflow.

Tasks:

1. Create a flow.
2. Add a screen element to prompt for the candidate's name.
3. Set the start element for the flow.
4. Add a screen element to prompt for the candidate's contact information.
5. Add a screen element to prompt for the candidate's experience and education.
6. Add a record create element to create a new candidate record.
7. Add a screen element to finish the wizard.
8. Save and run the flow.

**Time:**

40 minutes

Instructions:

1. Create a flow.
 - A. Click **Setup | Create | Workflow & Approvals | Flows**.
 - B. Click **New Flow**. The Welcome to Cloud Flow Designer screen opens displaying an overview video. Click **Close** to close the screen.
2. Add a screen element to prompt for the candidate's name.
 - A. Drag and drop **Screen** from the palette onto the flow window.
 - B. In the **Name** field, enter `Candidate Name`. (The **Unique Name** field auto-populates.)
 - C. Click the **Add a Field** tab.
 - D. Double-click the **Textbox** input type twice to add two textbox fields to the screen.
 - E. Click the top textbox field and enter `First Name` as the label. (The **Unique Name** field auto-populates.)
 - F. Click the other textbox field and enter `Last Name` as the label. (The **Unique Name** field auto-populates.)
 - G. Click **OK** to complete the screen element.

3. Set the start element for the flow.
 - A. Hover over the **Candidate Name** element.
 - B. Click the **Set as Start Element** icon.
 - C. Click **Save** and save the flow with the name `Candidate Wizard`. Click **OK** on the General Warning screen.

4. Add a screen element to prompt for the candidate's contact information.

- A. Drag and drop **Screen** from the palette.
- B. Name the element: `Candidate's Contact Information`
- C. Add three textbox input fields.
- D. Configure the fields:

Field Type	Label	Unique Name
Textbox	Phone	Phone
Textbox	Mobile Phone	Mobile_Phone
Textbox	Email Address	Email_Address

- E. Click **OK** to complete the screen element.
- F. Connect the Candidate Name element to the Candidate Contact Information element.
- G. Click **Save**.

5. Add a screen element to prompt for the candidate's experience and education.

- A. Drag and drop **Screen** from the palette.
- B. Name the element: `Experience and Education`
- C. Add the following fields.

Field Type	Label	Unique Name
Number	Years of Experience	Years_of_Experience
Checkbox	Currently Employed	Currently_Employed
Textbox	Current Employer	Current_Employer

- D. Add a multi-select picklist field.
 - i. Add a multi-select picklist field.
 - ii. In the Label field, enter `Education`. (The **Unique Name** field auto-populates.)
 - iii. Select **Create New | Choice** from Choice Settings.
 - iv. Enter `GED/HS Diploma` as the Label. (The **Unique Name** field auto-populates.)
 - v. Make sure `Text` is selected as the **Value Data Type**.
 - vi. Enter `GED/HS Diploma` as the **Stored Value** and click **OK**.
 - vii. Click **Add Choice** 6 times to add 6 other choices.
 - viii. Repeat steps iii-v for each of the choices with the following name and stored

values:

Choice Name	Stored Value
BA/BS	BA/BS
MA/MS/MBA	MA/MS/MBA
MD	MD
JD	JD
PhD	PhD
Post Doc	Post Doc

- E. Click and drag the **Education** field so that it is below the **Years of Experience** field and above the **Currently Employed** field.
 - F. Click **OK** to complete the screen element.
 - G. Connect the Candidate's Contact Information element to the Experience and Education element.
 - H. Click **Save**.
6. Add a record create element to create a new candidate record.
- A. Drag and drop **Record Create** from the palette onto the flow window.
 - B. Name the element `Create Candidate`. (The **Unique Name** field auto-populates.)
 - C. Select the `Candidate` object from the Custom section of the **Create** picklist.
 - D. Configure the fields and associated values:

Field	Values
First_Name__c	Screen Input Fields First_Name
Last_Name__c	Screen Input Fields Last_Name
Phone__c	Screen Input Fields Phone
Mobile__c	Screen Input Fields Mobile_Phone
Email__c	Screen Input Fields Email_Address
Education__c	Screen Multi-Select Fields Education
Currently_Employed__c	Screen Input Fields Currently_Employed
Current_Employer__c	Screen Input Fields Current_Employer
Years_of_Experience__c	Screen Input Fields Years_of_Experience

- E. Click **OK**.
- F. Click and drag an arrow connector from the Experience and Education element to the Record Create element to connect the elements together.

- G. Click **Save**.
- 7. Add a screen element to finish the wizard.
 - A. Drag and drop **Screen** from the palette onto the flow window.
 - B. In the **Name** field, enter `Candidate Created`. (The **Unique Name** field auto-populates.)
 - C. Add a display text field.
 - D. Name the display text field: `CandidateCreated`
 - E. Enter this message in the field:

`The candidate you entered, {!First_Name} {!Last_Name}, has been created.`

Use the **Select Resource** picklist to enter the `{!First_Name}` `{!Last_Name}` screen input fields.
 - F. Click **OK**.
 - G. Connect the Create Candidate element to the Candidate Created element.
 - H. Click **Save**.
- 8. Run the flow.
 - A. Click **Run**.
 - B. Enter the candidate information into the corresponding fields:
 - i. **First Name:** John
 - ii. **Last Name:** Smith
 - iii. **Phone:** 4155551234
 - iv. **Mobile Phone:** (leave blank)
 - v. **Email:** (leave blank)
 - vi. **Years of Experience:** 3
 - vii. **Education:** BA/BS
 - viii. **Currently Employed:** (selected)
 - ix. **Current Employer:** XYZ labs
 - C. Click **Finish** and close the flow browser tab.
 - D. Click **Close** to exit the Flow Designer.
 - E. Navigate to the existing candidates and verify that John Smith is listed as a candidate.

14-2: Create a New Version of a Flow

Scenario:

Universal Containers is also seeing a number of duplicate candidate records being created. They want to add a record lookup to the candidate wizard to check if the candidate is already in the system based on their name.

Goal:

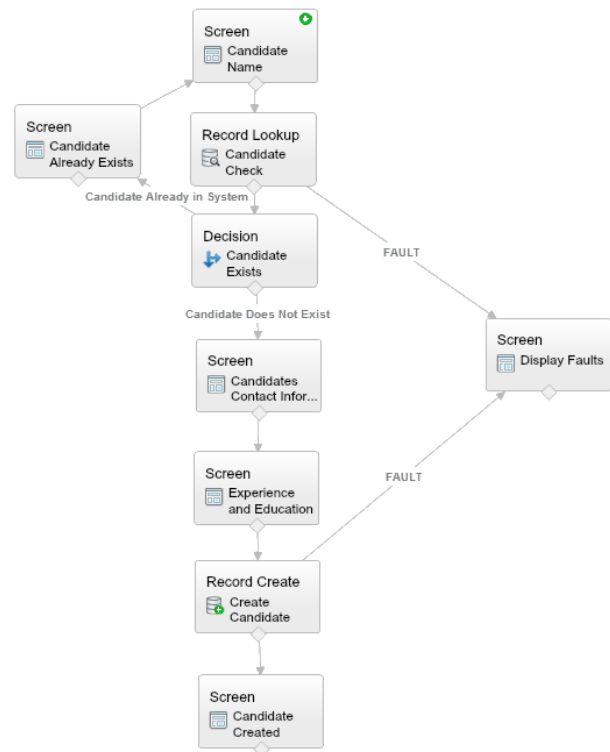
Create a flow using Visual Workflow.

Tasks:

1. Open an existing flow.
2. Add a record lookup element to check if the candidate exists.
3. Save a new version of the flow.
4. Add a decision element based on the lookup element.
5. Add a screen element to display faults for data elements.
6. Save and run the flow.

Time:

40 minutes



Instructions:

1. Open an existing flow.
 - A. Click **Setup | Create | Workflow & Approvals | Flows**.
 - B. Select **All Flows** from the **View** picklist.
 - C. Click the **Candidate Wizard** link.
 - D. Click **Open** next to version 1 of the flow.
2. Add a record lookup element to check if the candidate exists.
 - A. Drag and drop **Record Lookup** from the palette onto the flow window.
 - B. In the **Name** field, enter **Candidate Check**. (The **Unique Name** field auto-populates.)
 - C. Select the **Candidate** object from the Custom section of the **Lookup** picklist.
 - D. Enter two lookup filters:

Field	Operator	Value
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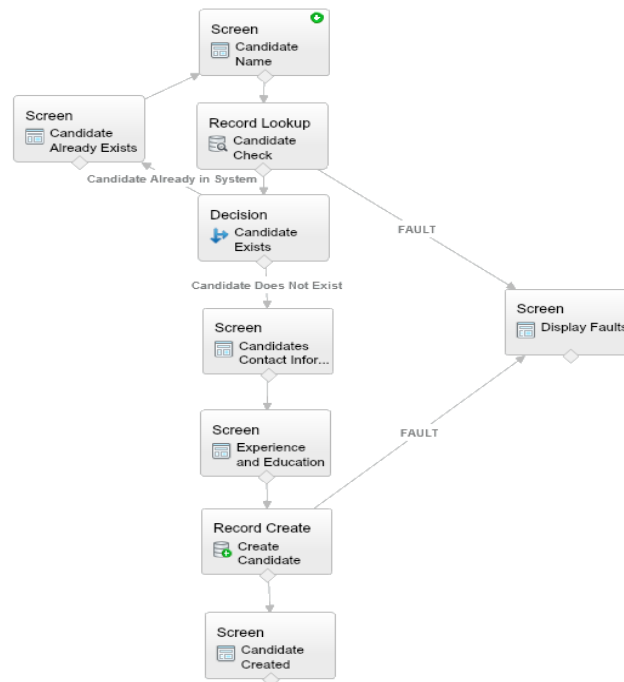
First_Name__c	Equals	Screen Input Fields First_Name
Last_Name__c	Equals	Screen Input Fields Last_Name

- E. Create a new variable:
 - i. Select **Standard | Id** as the field in the **Field** picklist.
 - ii. Select **Create New | Variable** from the **Variable** picklist.
 - iii. Enter `ExistCandidateID` as the **UniqueName**.
 - iv. Click **OK** to complete the variable.
 - F. Click **OK** to complete the lookup element.
 - G. Delete the connector between the Candidate Name element and the Candidate's Contact Information element by selecting the connector and pressing the **Delete** key.
 - H. Click and drag an arrow connector from the Candidate Name element to the Candidate Check element to connect the elements together.
3. Save a new version of the flow.
 - A. Click **Save As**.
 - B. Select `New Version` from the **Save As** picklist.
 - C. Click **OK**.
 4. Add a decision element based on the lookup element.
 - A. Drag and drop **Decision** from the palette onto the flow window.
 - B. Enter `Candidate Exists` as the name. (The **Unique Name** field auto-populates.)
 - C. Configure the **Editable Outcome**:
 - i. Enter `Candidate Already in System` as the **Editable Outcome** name. (The **Unique Name** field auto-populates.)
 - ii. Configure the resource row:

Resource	Operator	Value
Record Lookup Candidate Check	Equals	Global Constant \$GlobalConstant.True

- D. Configure the Default Outcome:
 - i. Click **Default Outcome**.
 - ii. Enter `Candidate Does Not Exist` as the name.
- E. Click **OK**.
- F. Connect the Record Lookup element to the Candidate Exists element.
- G. Add a screen to tell the user the candidate already exists:
 - i. Drag and drop **Screen** from the palette onto the flow window.
 - ii. In the **Name** field, enter `Candidate Already Exists`. (The **Unique Name** field auto-populates.)

- iii. Click the **Add a Field** tab.
 - iv. Double-click **Display Text**.
 - v. Double-click on the **Display Text** field and enter `ExistsMessage` at the name.
 - vi. Add the message `A Candidate with that name already exists.`
Please enter a different name. in the text field and click **OK**.
 - H. Connect the Decision element to the Candidate Already Exists element.
 - I. Select the `Candidate Already in System` outcome.
 - J. Connect the Candidate Already Exists element to the Candidate Name element to request that the user enter a different name.
 - K. Connect the Decision element to the Candidate's Contact Information element.
 - L. Click **Save**.
5. Add a screen element to display faults for data elements.
- A. Drag and drop **Screen** from the palette onto the flow window.
 - B. Name the element: `Display Faults`
 - C. Add a display text field.
 - D. Name the display text field: `Display_Fault_Message`
 - E. From the **Select Resource** picklist, select `SYSTEM AND GLOBAL VARIABLES | $Flow.FaultMessage`.
 - F. Click **OK**.
 - G. Connect the Candidate Check and Create Candidate element to the Display Faults element.
 - H. Click **Save**. Your flow should match the flow below.



6. Run the flow.

- A. Click **Run**.
- B. Enter an existing candidate first and last name. (For example, John Smith was added in a previous exercise.)
- C. Does a message that the candidate already exists display?

- D. Close the flow browser tab.
- E. Click **Close** to exit the Flow Designer.

14-3: Deploy a Flow

Scenario:

Universal Containers would like to be able to launch the candidate wizard from the candidate list view.

Goal:

Create a custom button on the candidate list view to run the candidate flow.

Tasks:

1. Activate the flow version.
2. Deploy the flow using a custom button.
3. Modify the Recruiting and HR profile to give them the Run Flows permission.
4. Run the flow.

Time:

10 minutes

Instructions:

1. Activate the flow version.
 - A. Click **Setup | Create | Workflow & Approvals | Flows**.
 - B. Select **All Flows** from the **View** picklist.
 - C. Click on the **Candidate Wizard** flow.
 - D. Click **Activate** next to version 2 of the Candidate Wizard flow.
2. Deploy the flow using a custom button.
 - A. Click **Create | Objects | Candidate**.
 - B. Scroll down to the Buttons, Links, and Actions section, and click **New Button or Link**.
 - C. In the **Label** field, enter `Candidate Wizard`. (The **Name** field auto-populates.)
 - D. Select the **List Button** radio button.
 - E. From the **Behavior** picklist, select `Display in existing window without sidebar or header`.
 - F. From the **Content Source** picklist, select `URL`.
 - G. Scroll down to the text area below the field selection controls box and enter the following URL without any spaces:
`/flow/Candidate_Wizard?retURL=/home/home.jsp`
 - H. Click **Check Syntax**.
 - I. Click **Save**.
 - J. Click **OK**.
 - K. Click **Create | Objects | Candidate**.

- L. Click **Edit** next to Candidate List View Search Layout.
 - M. Move the **Candidate Wizard** button from the Available buttons column to the Selected Buttons column.
 - N. Click **Save**.
3. Modify the Recruiting and HR profile to grant the Run Flows permission.
- A. Navigate to **Setup | Manage Users | Profiles | Custom – Recruiter**.
 - B. Select **System Permissions** and click **Edit**.
 - C. Select **Run Flows** and click **Save**.
 - D. Repeat these steps for the Custom – HR profile.
4. Run the flow.
- A. Click the Candidates tab.
 - B. Click **GO!**
 - C. Click **Candidate Wizard**.
 - D. Enter sample data in the wizard.
 - E. Verify that the new candidate record was created.