Pre-Workshop Checklist

Congrats! You are on your way to hosting a Salesforce Lightning Platform Workshop. We've created the checklist below to help you stay on track as you plan and prepare for your workshop. We know you're already itching to dig in, so first things first – go to the link below to sign up and access a scratch org for this workshop.

CREATE YOUR ORG > lightning-platform-workshops.herokuapp.com/

☐ **4+ weeks out**

- Choose a date and venue for your workshop.
- Create and send invitations. Include your workshop topic, date, time, and location
- Promote your workshop on social media.

**Pro tip: Use the provided promo card image to create your invite and promote on social media.*

☐ **3 weeks out**

- Practice your workshop: You can sign up to access the scratch org for your workshop here > lightning-platform-workshops.herokuapp.com/

☐ **2 weeks out**

- Fill out your swag request form to get fun gear to share with your attendees.* > https://bit.ly/2LJ6x27 [*5+ attendees required]

☐ **1 week out**

- Send a reminder email to your attendees.

☐ **Day of**

- Send an email to your attendees with the link to the Lightning Platform Workshop Launchpad, where attendees will go to sign up and access their scratch org. > lightning-platform-workshops.herokuapp.com/

Pro tip: Ask your attendees to sign up and load their scratch org on their computer prior to the workshop. This will save time at the beginning of the workshop.

- Have fun and share photos from your workshop! Tag @SalesforceforIT and include #LightningPlatform #WorkshopInABox.

Have questions or feedback about this workshop, running your own, or the Workshop-In-A-Box program in general? Please reach out here: **https://bit.ly/2MyImAF**.

salesforce lightning platform

Workshop Guide

Automate a Business Process with Point and Click Tools

Automate a Business Process with Point and Click Tools

Introduction

Today, we just learned that one of our customers is going out of business. We've obviously got a lot of work to do.

Think about all the work we need to do…

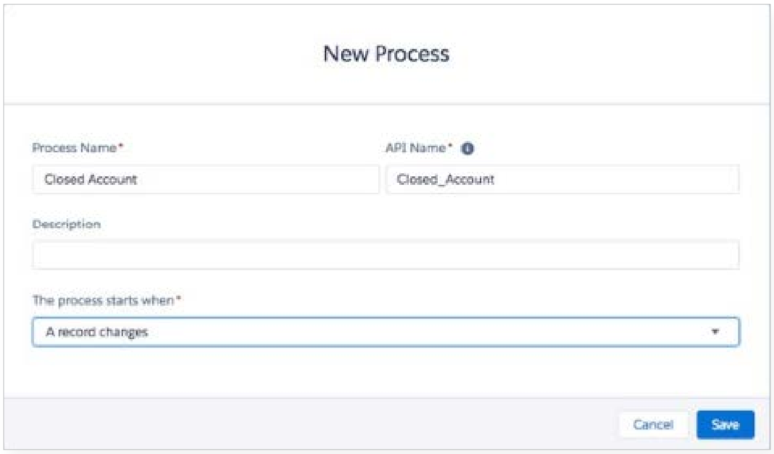
- Notify the Account Rep that they're closing, and have their manager redo the sales forecast
- Close all the open opportunities (since they're not going to buy anything!) and capture why
- Email legal department (they don't use Salesforce)
- Create referrals to recruit some of their people, since they already know us and our products

How do all of our employees know what to do? How do we know that they'll do it all correctly? Wouldn't it be nice if that happened automatically? That's why we have Process Builder.

Part 1: Create a process with Criteria

Let's create a new process to get all of this going.

1. ***Gear > Setup > Process Builder > New***

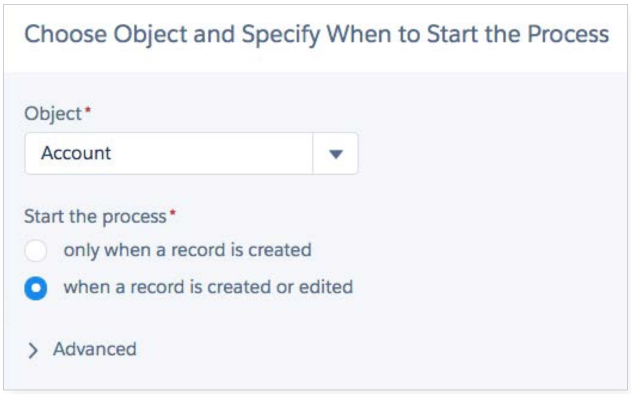


2. Name it ***Closed Account***, and it starts when a record changes.

3. **Save**.

4. **Add Object, select account**, and **change the button to** "when a record is created or edited".

5. **Save.**



6. **Add Criteria**, name it '***Inactive***".

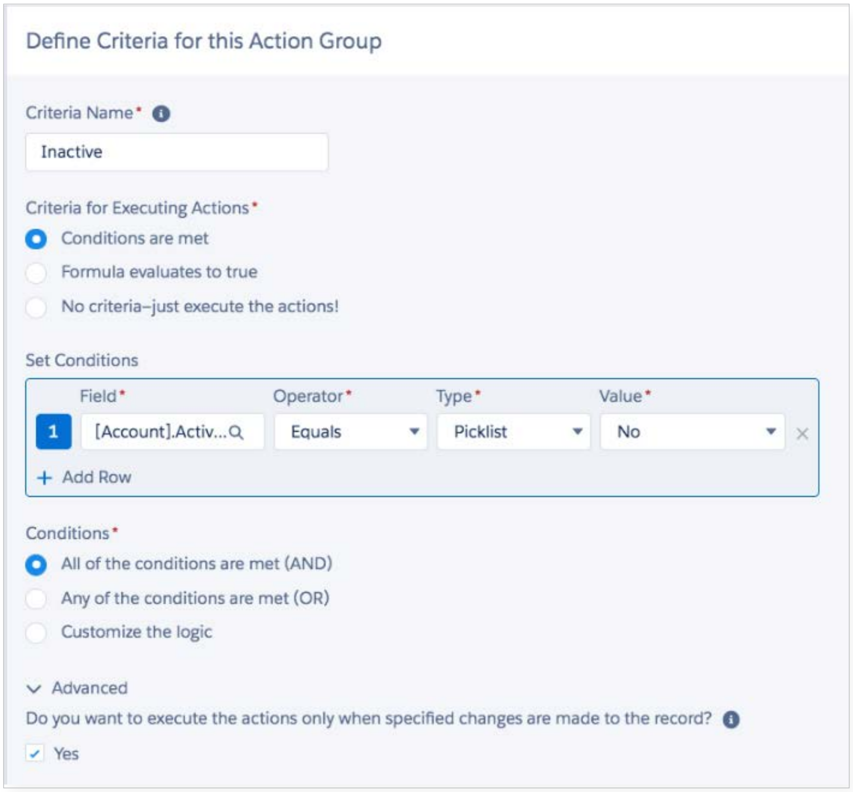
Under "Set Conditions" the field is named Active, operator is Equals, Type is Picklist, and Value changes to No. Whenever an account is inactive, our process will run.

Here's an important trick–we only want this process to run when the account changes from active to inactive.

8. **Open Advanced dropdown** and **check the box**. (Instead of running every time an account changes while it's inactive, this process only runs when the value of the field changes.)

9. **Save.**

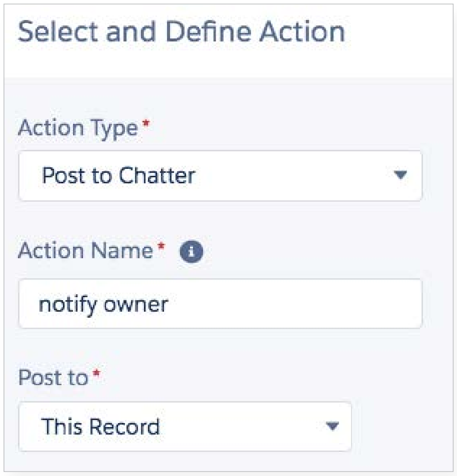
Great, our process is ready for action. Let's make some actions.



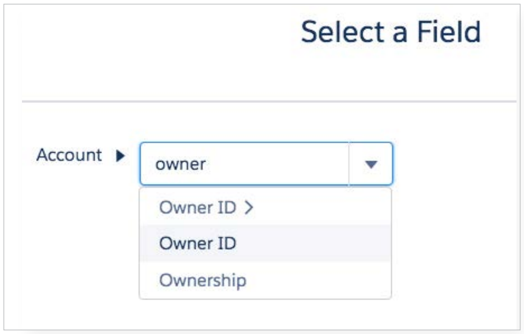
Part 2: Notify the Account Owner

First, let's notify the account owner that the account is no longer active.

1. ***+ Add Action*, Action Type = *"Post to Chatter"*, Name = *"notify owner"*, Post to = *"This record"***

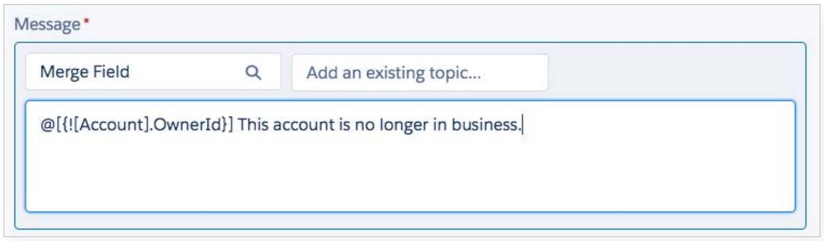


2. On the Message area, click the ***Merge Field box***. Select the ***Owner ID*** (no chevron) as shown below.



3. This'll add the text ***{![Account].OwnerId}*** to the message box. We need to wrap it in @[ ] so that it looks like this ***@[{![Account].OwnerId}]***

This is a little trick to do dynamic @mentions of any user related to a record. Let's finish out our message.



4. Click **Save** to save the action, then **Activate** the process, then **Confirm**.

VERIFICATION

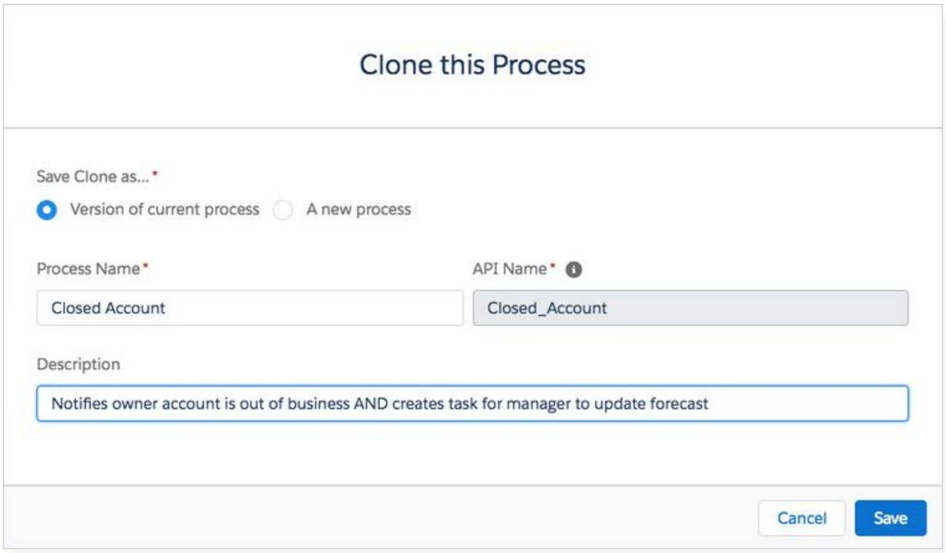
Let's see how we did. **Search** for an account called Burlington Textiles and **change its *Active field* from Yes to No**.

You should see your chatter message appear in the chatter tab. If you've never used chatter before, there's now a post beside the account, AND the account owner gets notified (by email, or push notification in Salesforce1 depending on how they have their notifications set up)

Part 3: Task creation for owner's manager

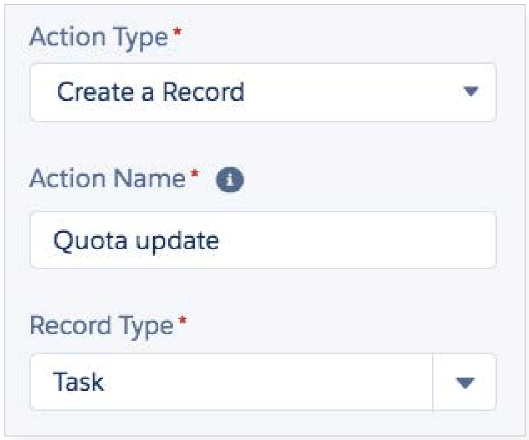
The sales rep's going to be disappointed he/she lost as customer. But their boss needs to adjust quote and forecasts. Let's create a task for that.

1. Head back to Process Builder, open the process we built, and **Clone** it choosing to Clone as a ***Version of the current process.***



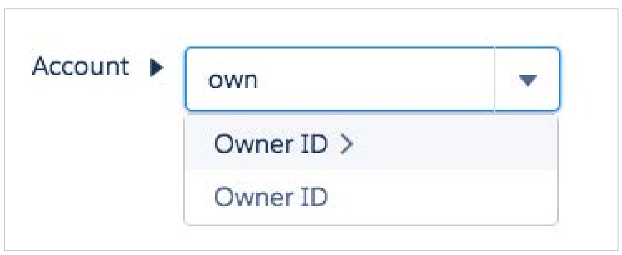
(Process Builder versions anything that we activate so we can always roll back to the previous versions. Cloning lets you start working on a new one without disturbing the existing one).

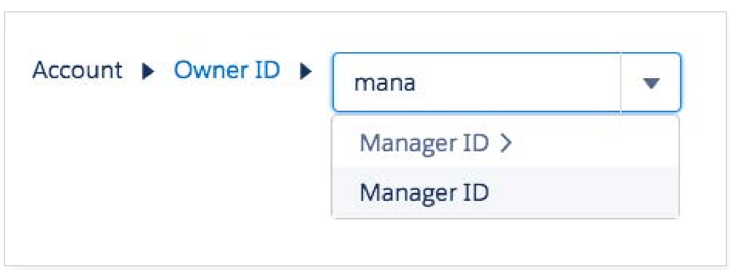
2. ***+ Add Action***, configure as shown



3. On the Field Type besides Assigned to Id, change it to ***Field Reference***. (Field Reference means we're going to get a value based on the record.)

4. For Value, click Find a field, then select the ***owner ID >*** (with a chevron time!) and then ***manager ID*** (no chevron). Then click ***Choose***.



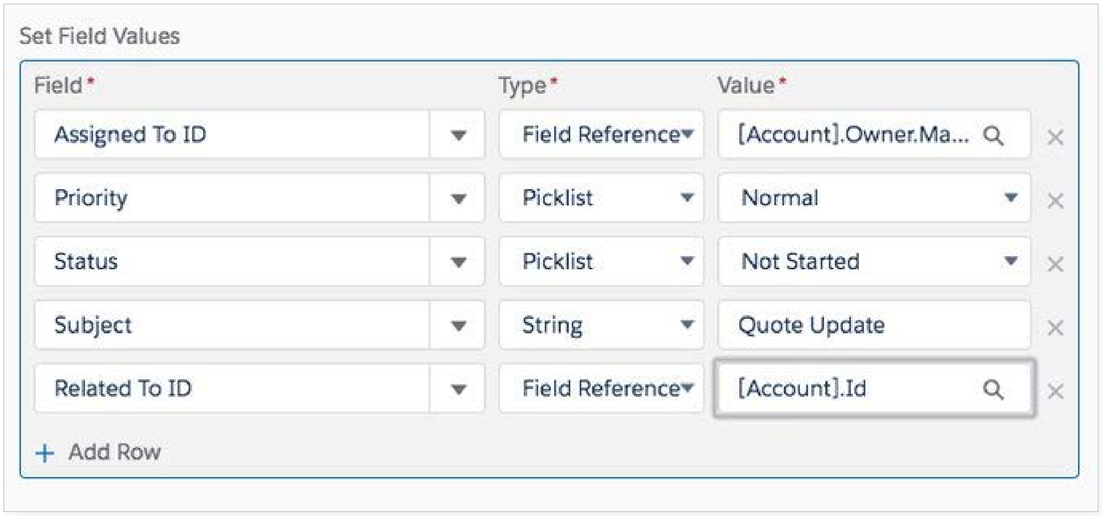


Process Builder lets us traverse up related objects...from the account, to the owner (a user) then to another user (their manager). No SQL database joins required!

Let's finish setting the values for the task. The three shown are required, so Process Builder put them on the screen for you.

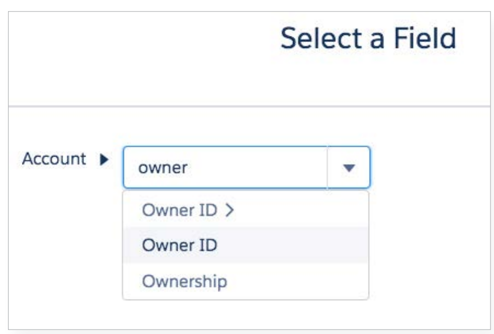
5. Click ***Add Row*** and select ***Subject*** to give the task a name.

6. Then click ***Add Row*** again and select ***Related To ID.***



Related to ID is a special field on tasks that lets them relate to a record.

7. To relate it to this customer, we'll again set the type to ***Reference*** and then select ***Account ID***, **Choose**, and **Save**.



Tasks are just the beginning–you can automatically create ANY record, standard or custom, using this feature in Process Builder.

8. **Save** your action then **Activate** the process.

VERIFICATION

Let's see how we did. Search for an account called ***SForce*** and change its ***Active*** field from ***Yes to No***.

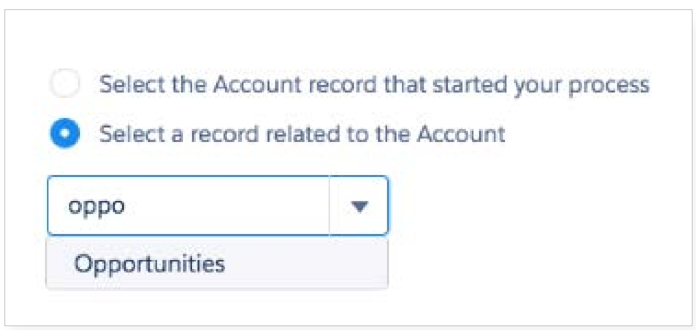
Refresh the page and see if an activity was created and assigned to Integration User (the owner's manager).

Part 4: Closing Opportunities

We've got 3 opportunities in progress for our customer. But we know they're not going to get those deals, so let's have the system automatically mark them "closed lost", saving the Sales Rep some time AND making sure our forecasts are up to date.

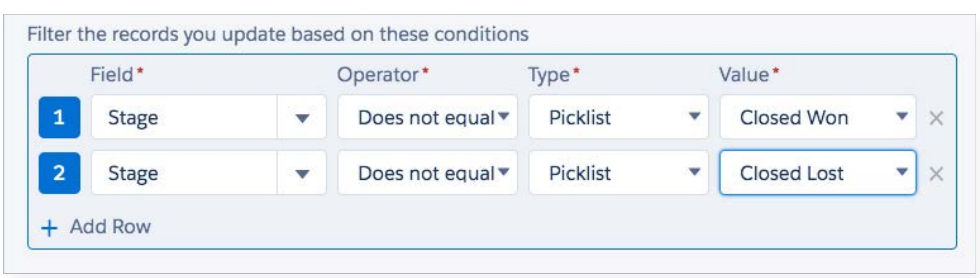
1. Head back to Process Builder, open the process we built, click on the most recent version, and **Clone** it. ***+ Add Action.***

2. Click ***Record Type***, and set the ***Related*** option to ***Opportunities***. (Process builder can read all the objects that have relationships to the object that started the process.)



But we don't want to change anything about opportunities that were already won.

3. Flter the update by selecting ***Updated records meet all criteria***.



Now, we'll update anything that's not already closed.

4. Let's mark as ***Closed Lost***

5. **Save**. (That's a very powerful action–to update related records of an object. 3 years ago, before Process Builder, you would have been writing code for that.)

6. Then **Activate** your process.

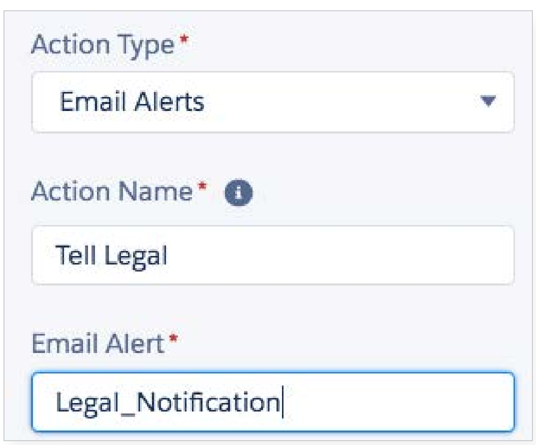
VERIFICATION

Let's see how we did. Search for an account called Pyramid Construction.
Click on the Related tab and look at its opportunity in prospecting stage.
On the Details tab, change its Active field from Yes to No and Save.
Look back at that opportunity–it's closed now!

Part 5: Email notification

Ready for an easy one? Our legal department a little to old-school to use an chatter or an app for this, so they've asked to be emailed. Your org already has an email template and an email alert set up.

1. Head back to Process Builder, open the process we built, click on the most recent version, and **Clone** it. ***+ Add Action.***



2. **Save**. (If you're already been using workflow email in Salesforce, migrating those to Process Builder is just that easy–you just reuse your existing alerts.)

Let's skip *activation* so you aren't tempted to sign in to your email on a shared computer, or get distracted by looking at all the crazy piling up while you're here.

Part 6: Recruiting Flow

Process Builder is powerful, but there's some things it can't do. For example, while we could get all the contacts for this account and update them, and we can create records, we can't create new records related to each contact that relates to this opportunity.

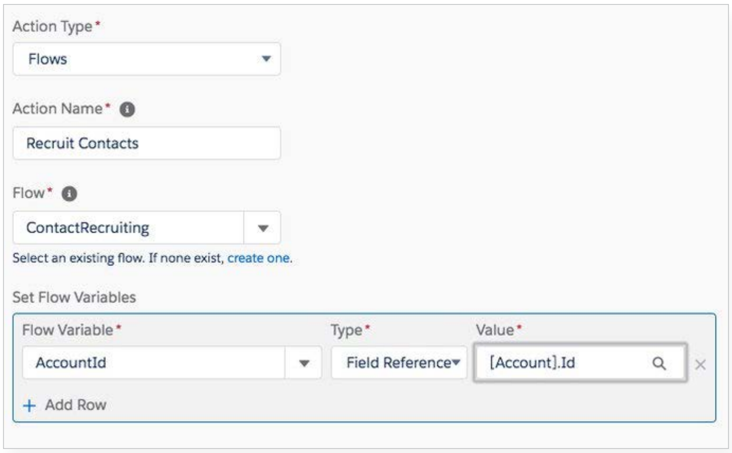
For stuff like that, we can use Process Builder's big sister, ***Flows***. We've already created the flow–let's go take a quick look at it.

1. Click the ***Gear > Setup > Flows > Contact Recruiting***

Flows let you do more complex decisions and actions, but are a little trickier to set up.

Let's add this flow to our Closed Account process.

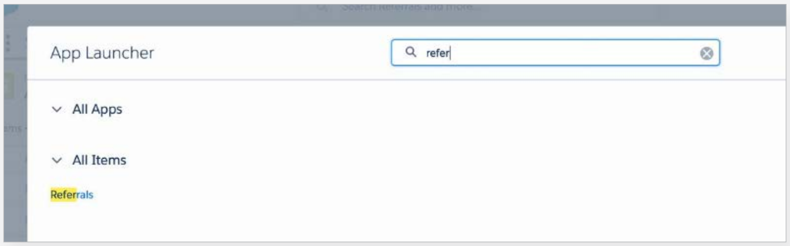
2. Back in Process Builder, ***+Add Action*** (Configure as shown–Add Row to get the flow variables. Be sure to set Type as Field Reference.)



3. **Save and Activate**

VERIFICATION

Search for the customer called United Oil and Gas Corp (the main office, not the Singapore or UK Subsidiary). Let's flip them to Active.= No. See those 4 contacts on the Related tab? Maybe some of them want to work for us. Click on the App Launcher and search for Referrals. Then click on Referrals.



WRAP-UP

Since almost all of our customers are out of business, it's time to wrap up.

Hopefully you've gotten a feel for what Process Automation can do within any objects, whether Sales/Service or custom objects that you create.

THANK YOU!