

Salesforce Automation - Flow Builder



Outline

I. Getting Started

- Definition
- Use cases

II. Flow Builder

- User interface
- Flow building blocks

III. Formulas and Validations

- Formulas fields
- Roll-up Summary
- Create validation rule



I. Getting started

Definition

Flows can be described as visual coding - they are declarative but they require basic understand of some programming concepts as variables & how logic works.



I. Getting started

Basic use cases

Flows are useful for two major use cases:

- behind-the-scenes automation
- guided visual experiences.



I. Getting started

Basic use cases

If your business process runs **behind the scenes**, and it should start automatically, such as when a *record changes*, there are followings solutions:

- Build a process in Process Builder
- Build an autolaunched flow
- Build an Apex trigger



I. Getting started

Basic use cases

If your business process requires **input from a user**, you can use a:

- Screen flow
- Lightning component

=> Choose the simpler solution (always)



II. Flow Builder

User interface

When you build flows, you work from Flow Builder. Here are its parts and pieces:

- toolbox
- canvas
- button bar



Flow Builder

?

Button bar

Auto-Layout (Beta)

Run

Debug

Activate

Save As

Save

Toolbox

Toolbox

Elements

Manager

Interaction (3)

Screen

Action

Subflow

Logic (4)

Assignment

Decision

Loop

Collection Sort

Data (4)

Create Records

Update Records

Get Records

Delete Records

Start

Screen Flow

Canvas

Get more on the AppExchange

II. Flow Builder

User interface

The **toolbox** contains the elements and resources you use to build your flow.

- From the Elements tab, add new elements, like Screen and Create Records, to your flow.
- From the Manager tab, create resources, such as variables, stages, and choices, to use in your flow. Or view a list of all elements and resources that you've added to the flow.



II. Flow Builder

User interface

The **canvas** is the working area, where you build a flow by adding elements. As you add elements to the canvas and connect them together, you see a visual diagram of your flow.



II. Flow Builder

User interface

The **button bar** provides information about the flow, such as: flow is active or not; how long ago the flow was saved; the flow has any warnings or errors.

The button bar also includes two buttons for running a flow: Run and Debug.

- **Run** runs the most recent saved version of the flow that you have open.
- **Debug** lets you enter values for the flow's input variables and display debug details while running the flow. That way, you can verify how the flow processes data.



II. Flow builder

Building blocks

Building blocks

Every flow is made up of three building blocks: **elements**, **connectors**, **resources**.



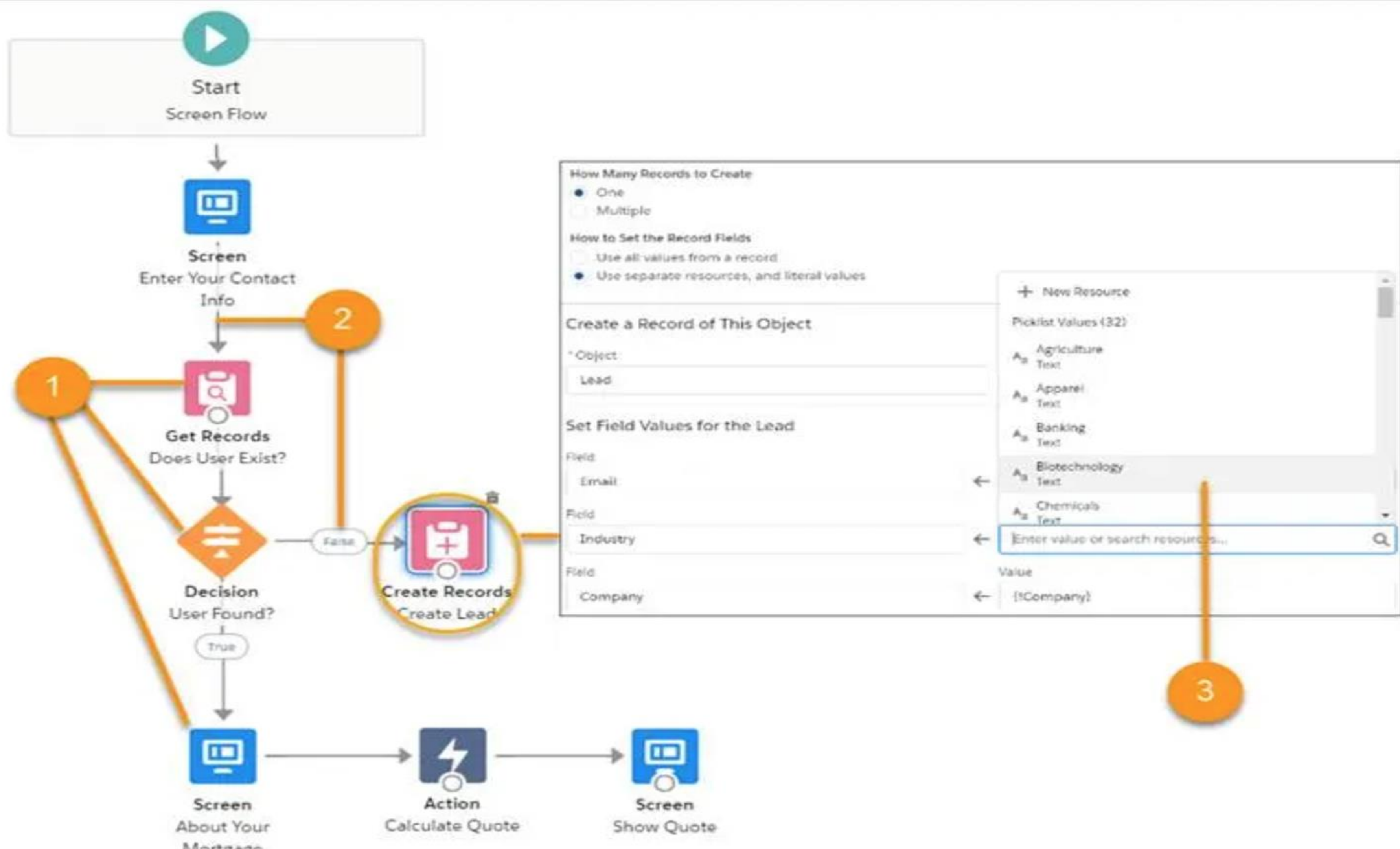
II. Flow builder

Building blocks

Elements

Each element is a step in the flow that instructs the flow on what to do. There are three different buckets: **screens, logic, and actions.**





II. Flow builder

Building blocks

Flow builder elements

- **Elements:** appear on the canvas -> click and drag it there from the toolbox.
- **Connectors:** define the path that the flow takes at runtime
- **Resources:** are containers that represent a given value, such as field values or formulas (reference-able)



Q&A

