

Clicks not Code with Salesforce Flow and Spring'14

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A rowing team of four men in blue athletic wear and caps, racing on the water. They are using long wooden oars, and the boat is white with blue accents. The water is dark blue with white splashes from the oars.

About FinancialForce.com

- Strong ties to Salesforce
 - Joint venture of Salesforce.com and Unit4
 - Executive involvement
 - Native on the Salesforce platform
- HQ San Francisco; Development teams in US, UK and Spain
- 260 Employees
- Customers in 27 Countries with Users in 45 Countries

Agenda

What is flow, what is it's value?

Where can flow be used?

What are some advanced uses of it?

Q&A

What is flow

- Also know as...
 - Visual Workflow
 - Visual Flow
- Differences between Workflow and Visual Workflow:
 - Workflow:
 - Event Trigger - Execute rules and actions behind the scene
 - Visual Workflow:
 - User Trigger – Offers screens to display and collect data

What is flow, what is it's value?

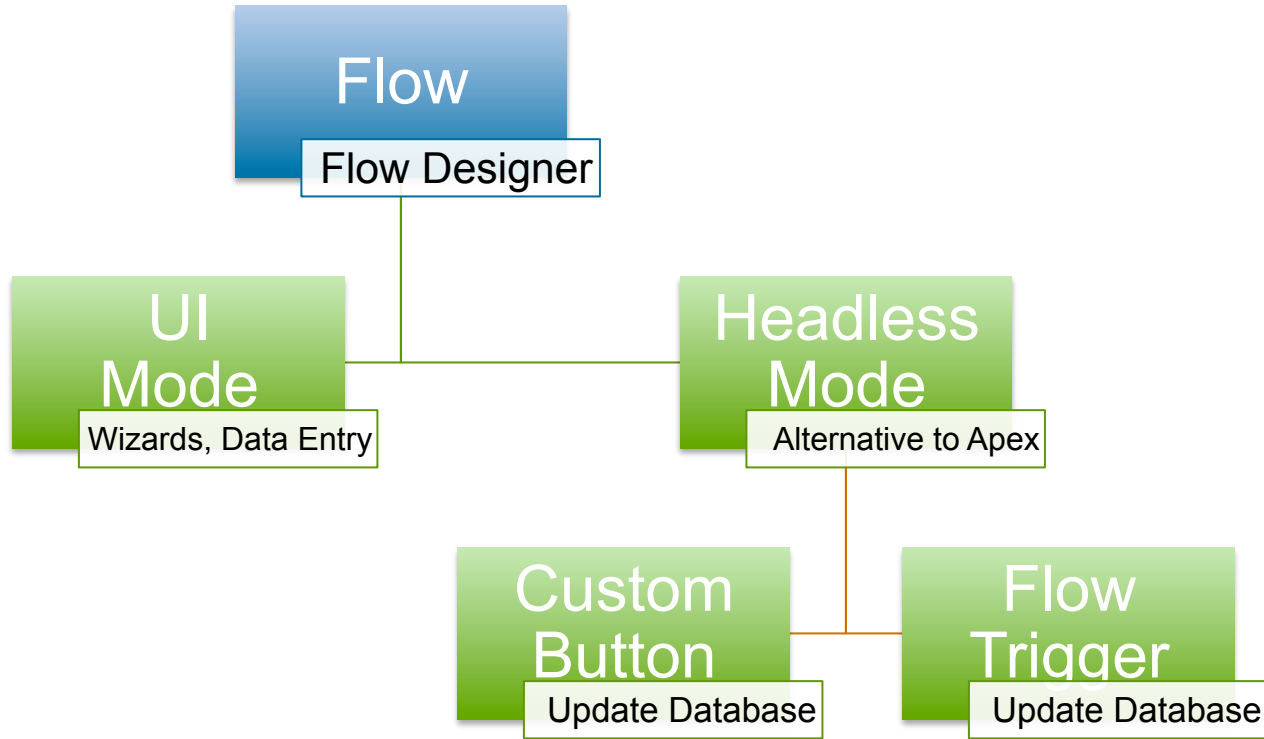
- What can I do with it... **#clicksnotcode**
 - Wizards – Surveys, Guided data entry...
 - Automate Records – Create, Read, Update and Delete...
 - Extendable by Developers – Develop new features via Apex

Where can Flow be used in Salesforce?

How can my users run a flow?

- Flow Designer – Run it during the creation process
- URL – Any where a URL can be customized
- Custom Tab– Web or Visualforce tabs
- Custom Button – Web or Visualforce buttons
- Visualforce Pages – Standalone or embedded in Layout
- Workflow – New for Spring'14, Flow Triggers!

Flow Usage - Types



Flow Usage - Demos

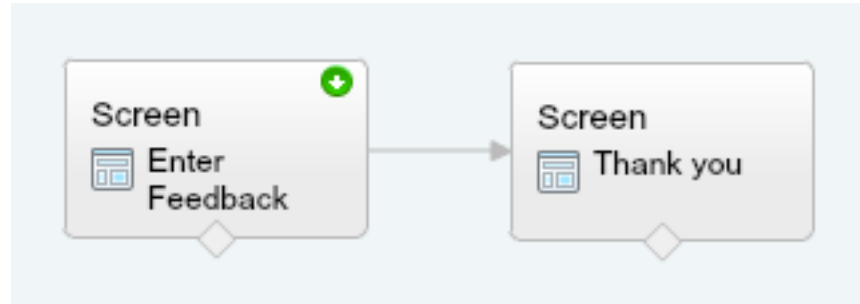
Demonstrate Flow Usage

- UI – Case Feedback
- Custom Button – Add default Opportunity Product lines
- Workflow Flow Trigger – Create Task on Account creation

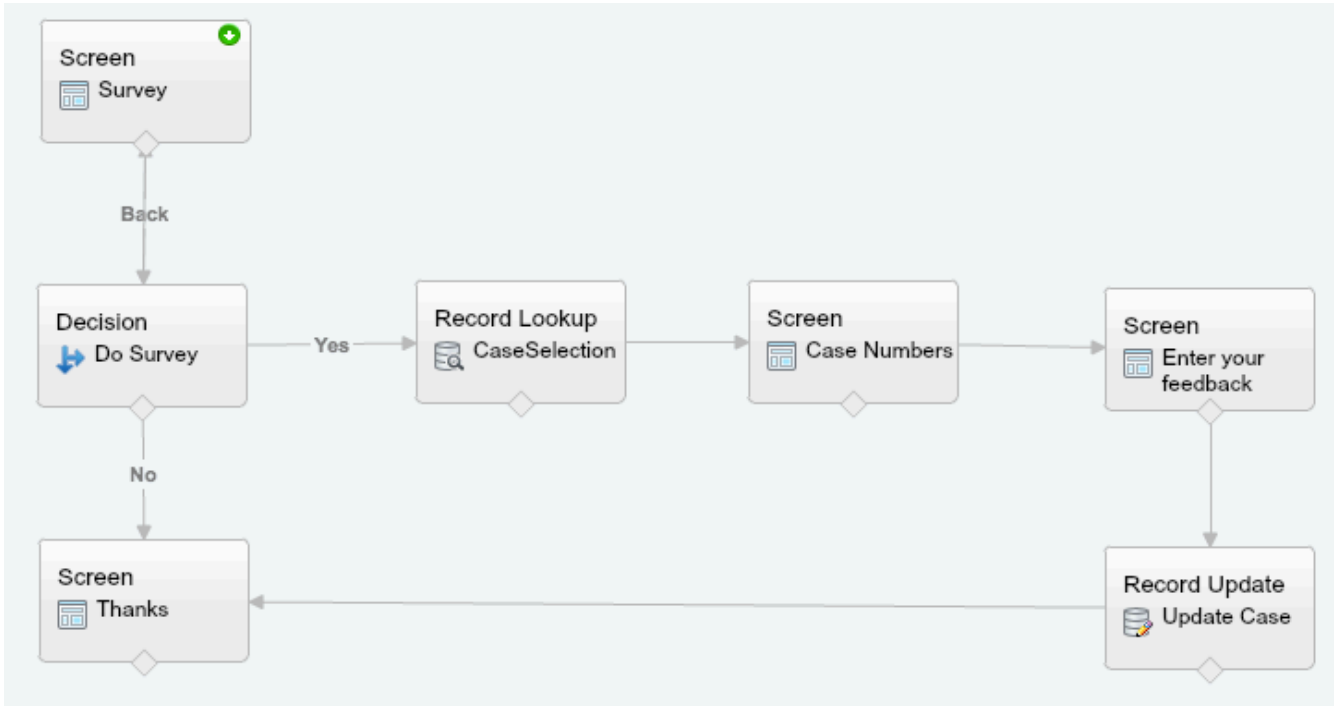
UI – Case Feedback Demo

Heading

- Survey after a IT support case.



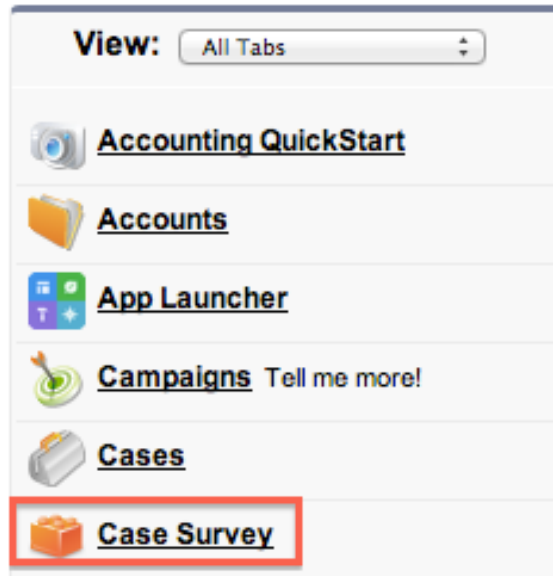
UI – Case Feedback Demo



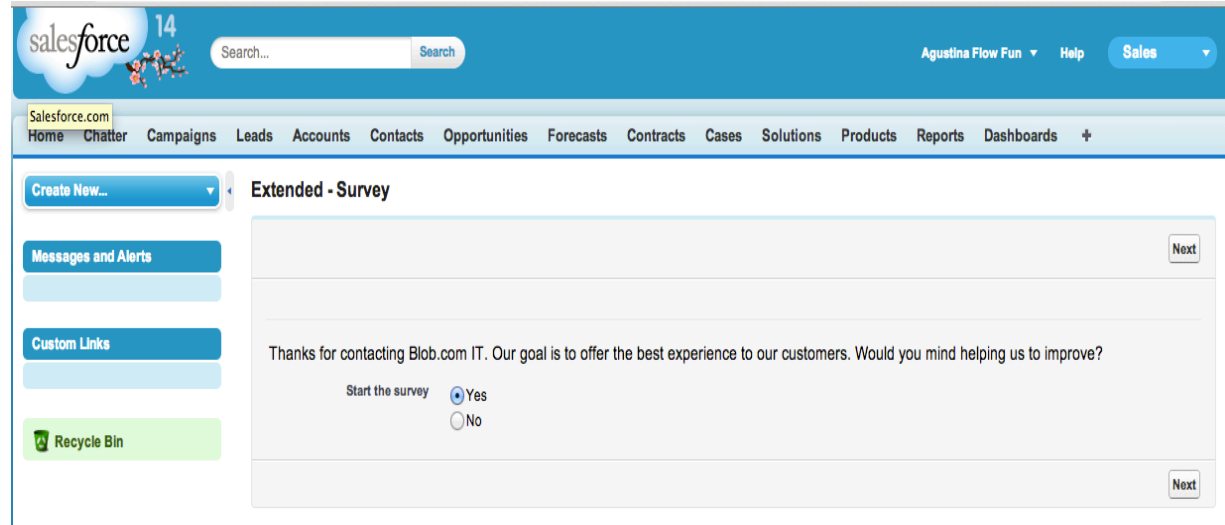
UI – Case Feedback Demo

All Tabs

Use the links below to quickly navigate



A screenshot of the Salesforce navigation sidebar. It features a 'View:' dropdown menu set to 'All Tabs'. Below this, several navigation items are listed with icons: 'Accounting QuickStart' (camera icon), 'Accounts' (folder icon), 'App Launcher' (grid icon), 'Campaigns' (target icon) with the text 'Tell me more!', 'Cases' (box icon), and 'Case Survey' (brick icon). The 'Case Survey' item is highlighted with a red rectangular border.



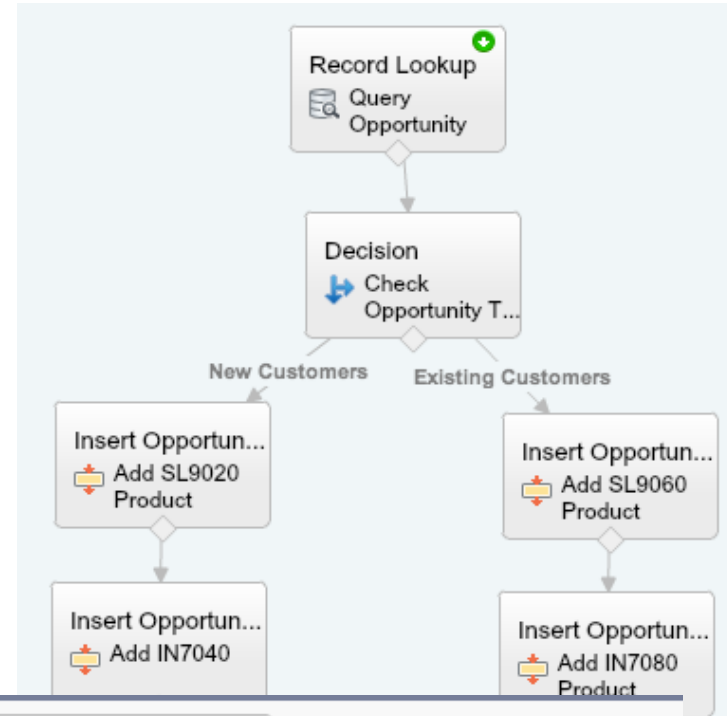
A screenshot of the Salesforce user interface showing a case record. The top navigation bar includes the Salesforce logo, a search bar, and user information 'Agustina Flow Fun' with a 'Sales' dropdown. Below the navigation bar is a tab bar with options: Home, Chatter, Campaigns, Leads, Accounts, Contacts, Opportunities, Forecasts, Contracts, Cases, Solutions, Products, Reports, and Dashboards. The main content area is titled 'Extended - Survey' and contains a survey form. The form has a 'Create New...' button, a 'Messages and Alerts' section, a 'Custom Links' section, and a 'Recycle Bin' section. The survey text reads: 'Thanks for contacting Blob.com IT. Our goal is to offer the best experience to our customers. Would you mind helping us to improve?'. Below the text are two radio buttons: 'Start the survey' with 'Yes' selected and 'No' unselected. The form ends with a 'Next' button.

Headless – Custom Button – Create Product Lines

Flow Custom Buttons in Action

■ Passing Parameters

```
<apex:page standardController="Opportunity">
  <flow:interview name="AddDefaultProducts"
    finishLocation="/{!Opportunity.Id}">
    <apex:param name="OpportunityId"
      value="{!Opportunity.Id}"/>
  </flow:interview>
</apex:page>
```



Buttons, Links, and Actions

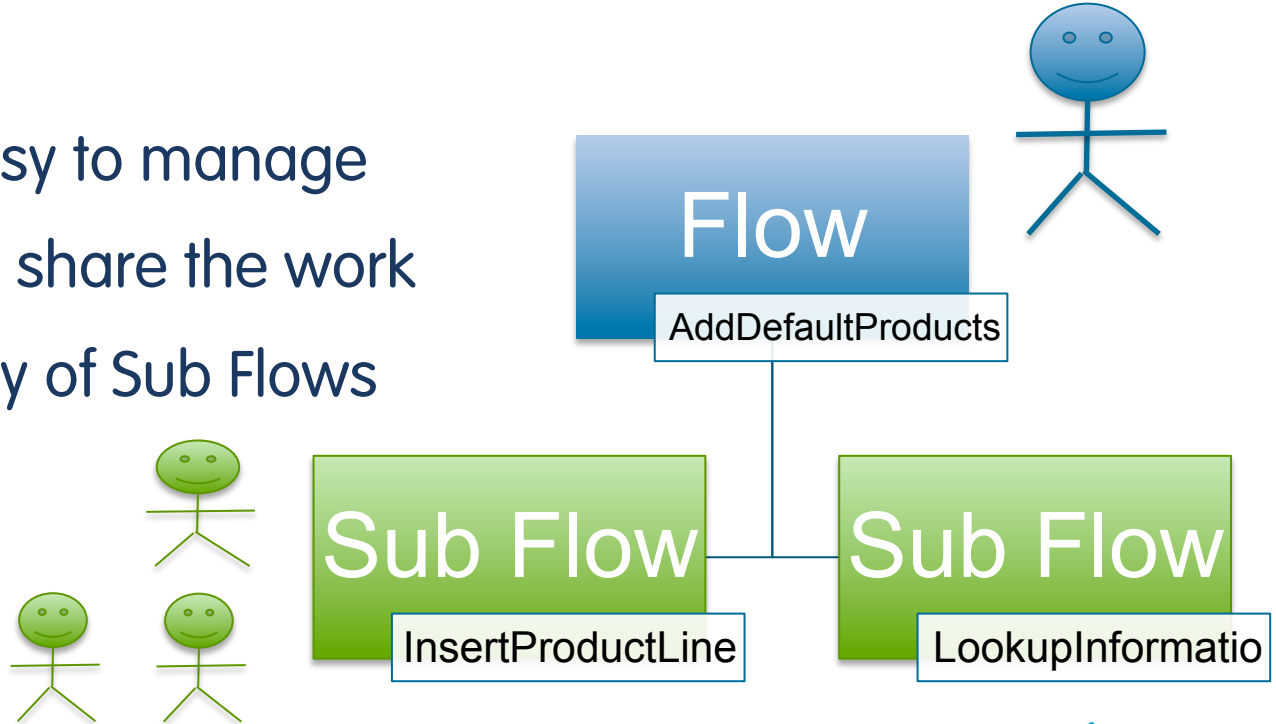
[New Action](#)[New Button or Link](#)[Default Custom Links](#)[Buttons, Links, and Actions](#)

Action	Label	Name	Description	Type	Content Source	Icon	C
Edit Del	Add Products by Type	AddDefaultProducts		Detail Page Button	Visualforce Page		n

Headless – Custom Button – Leveraging Sub Flows

It's good to share!

- Making flows easy to manage
- Break down and share the work
- Consider a library of Sub Flows



Headless – Workflow – Create Task on Account Create

Flow Triggers in Action

- Passing Parameters

Workflow Actions

Immediate Workflow Actions

Type	Desc
Flow Trigger	<u>CreateTask</u>

Edit Flow Trigger

Name

Unique Name

Protected Component ☒


Object Account

Flow

☒ Set Flow Variables

Select the name of the flow variable or sObject variable. Then enter a literal value, or click the lookup icon to insert a field.

Name	Value
<input type="text" value="WhatId"/>	<input type="text" value="{!Id}"/>

 [Clear](#)

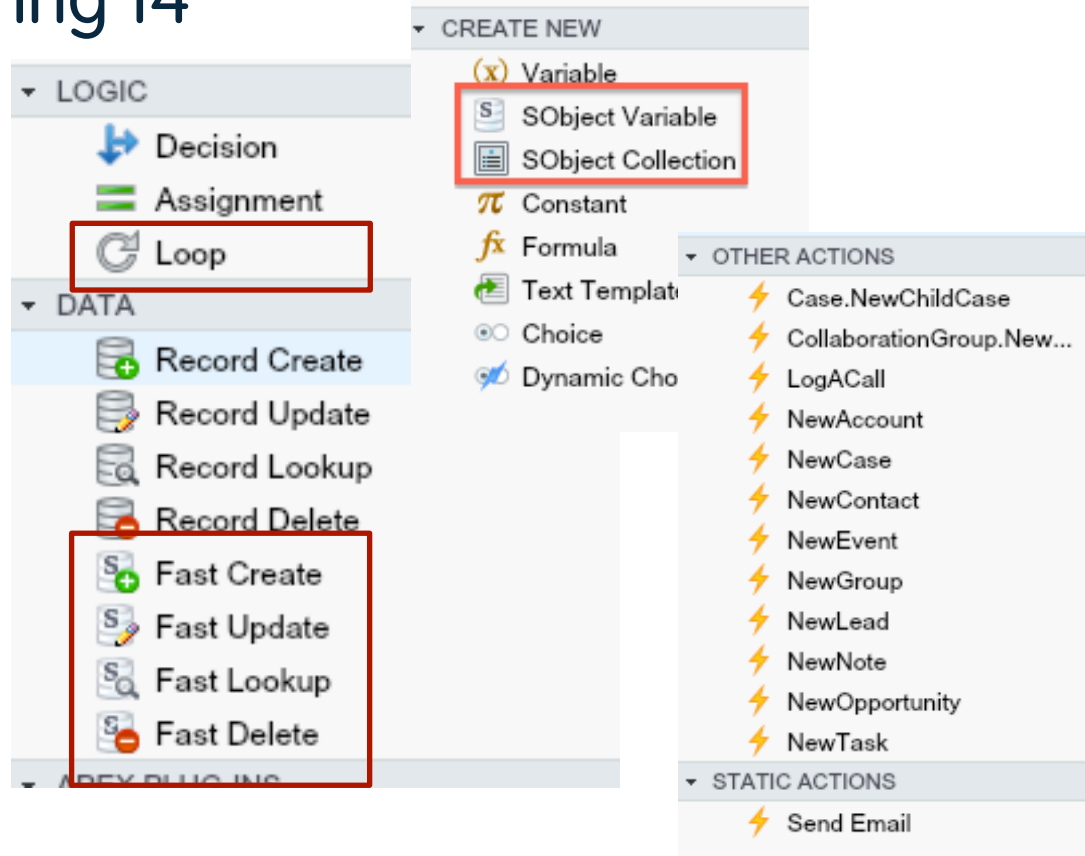
[Set Another Variable](#)

Record Create
 CreateTask

Flow – Also new for Spring'14

■ New Flow Elements

- New variables
 - Object Variable
 - Object Collection
- Fast
 - Lookup
 - Create
 - Update
 - Delete
- Loop
- Create Standard objects
- Send Emails



Flow – Advanced Topics

- **Sub Flow** – Simplify flows and allow others to create
- **Apex** – Extend the toolbox of Flow with anything you like!
 - For example the Chatter Apex flow extension

Q&A

Questions and Answers...

- Theming – Can I change the theme?
- Performance and Governors with Flow Trigger
 - Do I need to bulkify?
- Packaging – Are we able to package Flows?
- When will Spring'14 Pilots be available?
 - Under SAFE HARBOUR
- Any more questions... ?

Contacts and More...

Contact us and ask questions later...

- Agustina – @agarciaodeian
- Andy – @andyinthecloud, www.andyinthecloud.com
- FinancialForce GitHub
 - <https://github.com/financialforcedev>

Thank you!!