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Take "Action" with Flows

FORCE ACADEMY LOS ANGELES MAY 13, 2019
Session Training Instructions for:

Using a Flow to create a field update Account Action

Use Case: *Allow Account owners to update the Contact addresses with the Account's address at their discretion, not an automatic process.*

Presented by Melonie Scott, Independent Consultant

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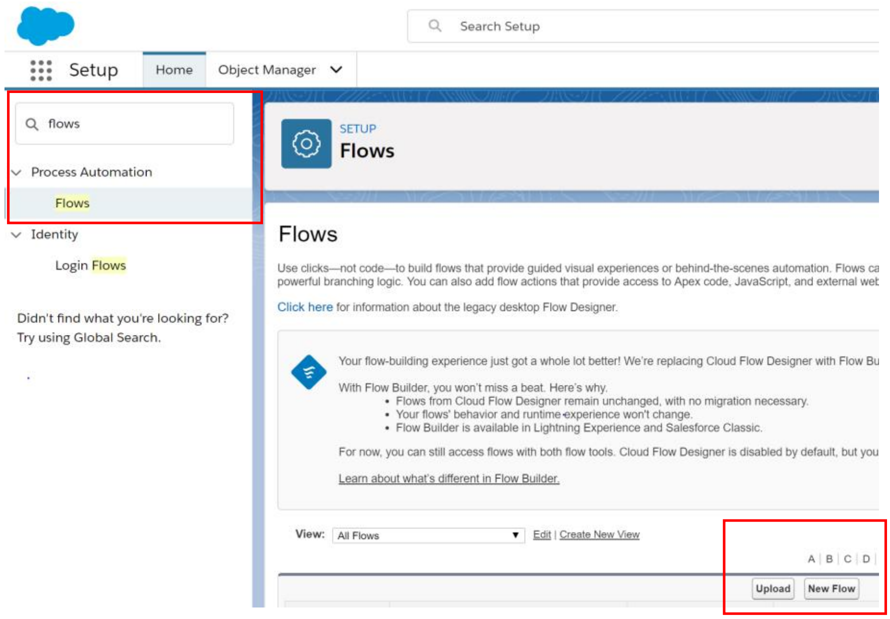
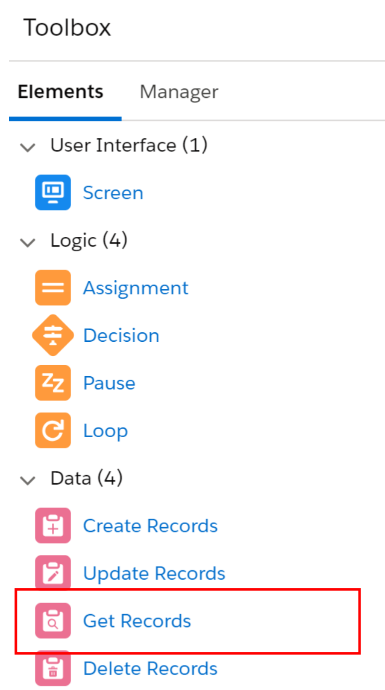
1

Create a New Flow from Setup



2

Data:
Get Records – *you need to collect the record data you will reference*



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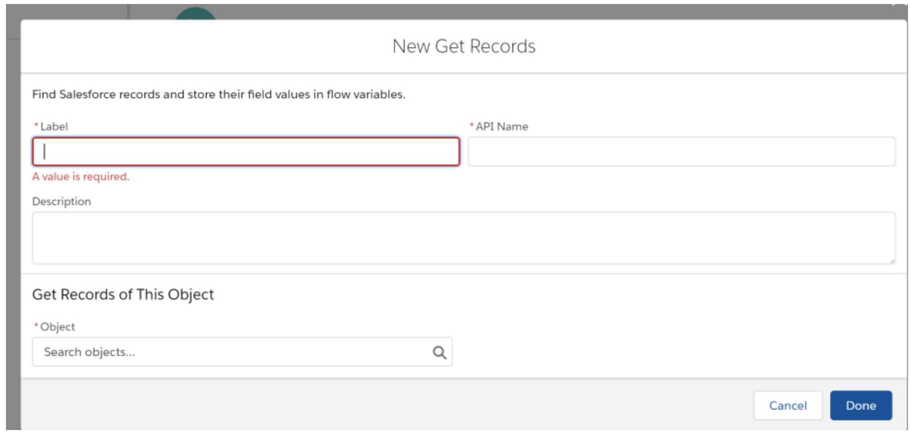
3

- Add Label
- Description
- Select the Object
  (Account)

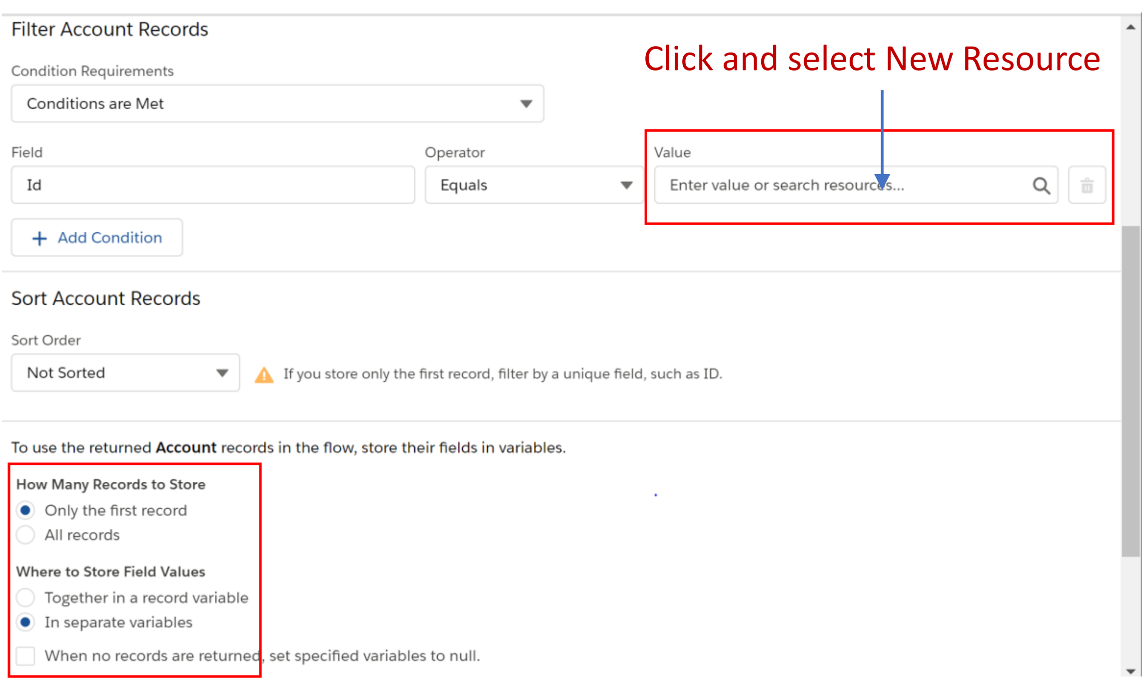


4

- Condition Requirements = Conditions are Met
- Field is ID (Account ID)
- Only the first record
- In separate variables

5

- Click into Value



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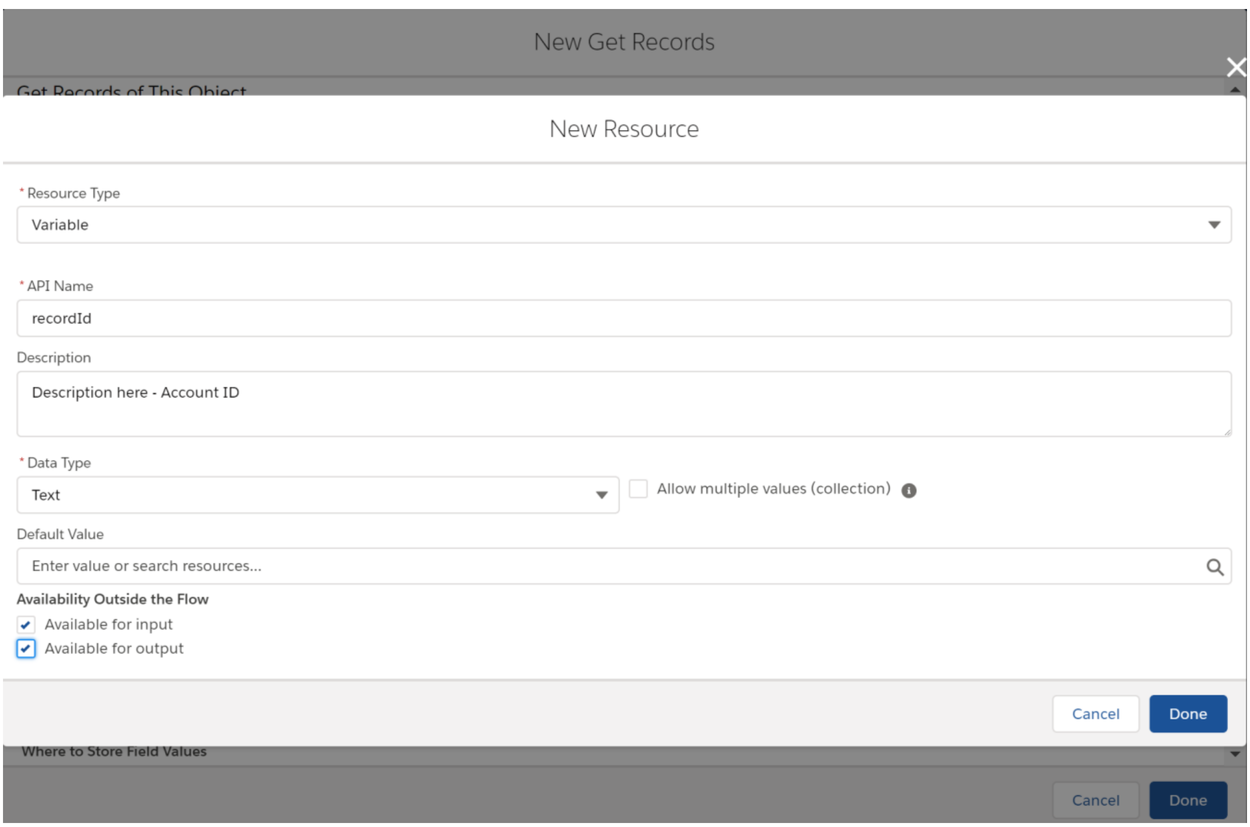
6a

Create a New Resource:
you need a destination to house the record data you are referencing

- Resource Type = Variable
- API Name = recordId
- Add Description
- Data Type = Text
- Default Value left blank
- Check off both Input and Output



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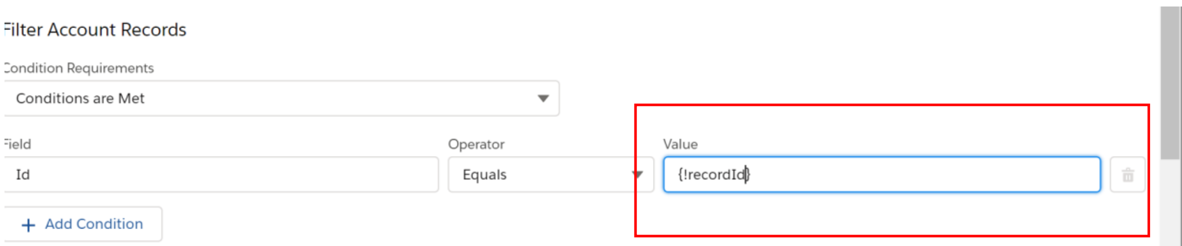
6b

You are back on the Get New Record page:

- Select the Variable (recordId) that you just created

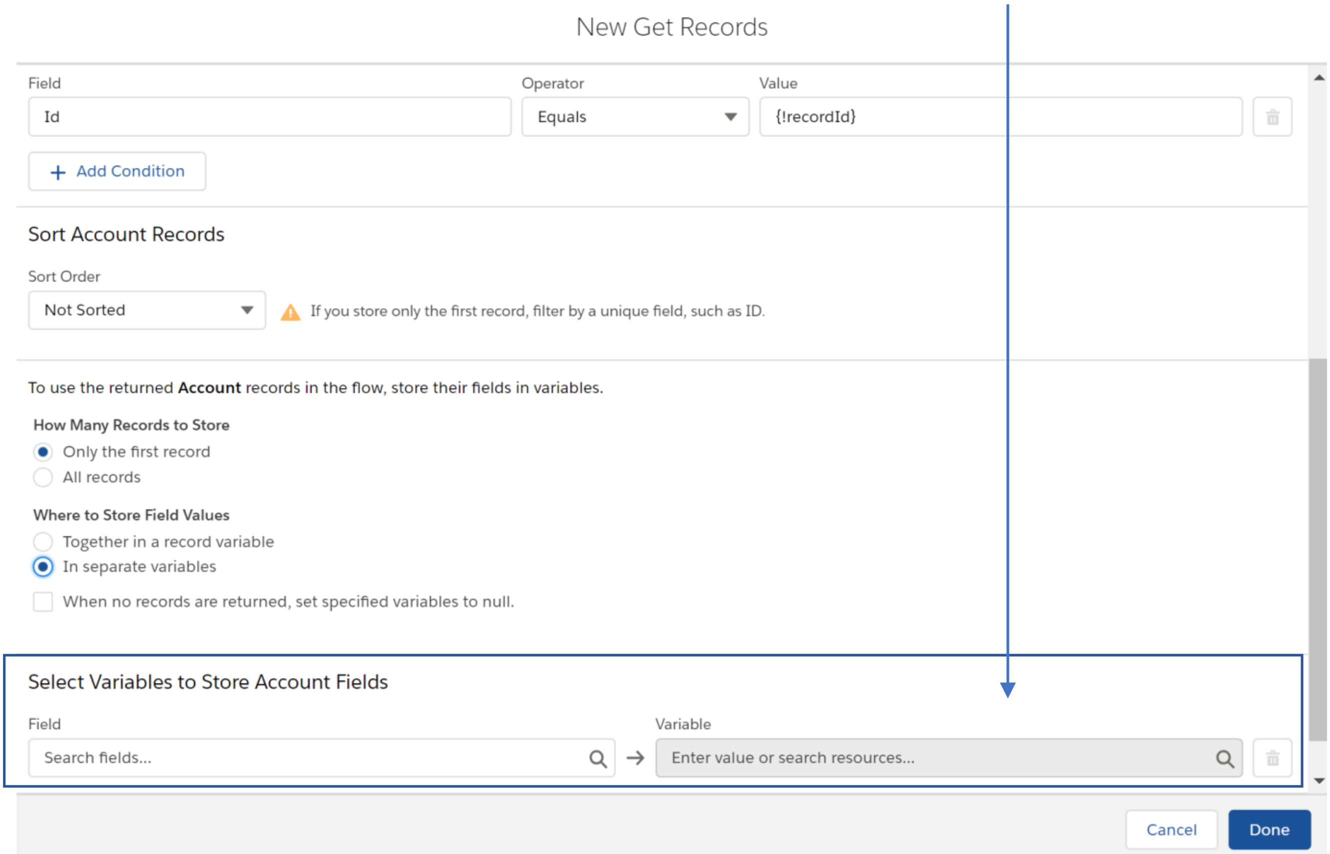


6c

Scroll down

- Sort Account Records = Not Sorted
- How Many Records = Only the first record
- Where to Store =
- Where to Store = In separate variables

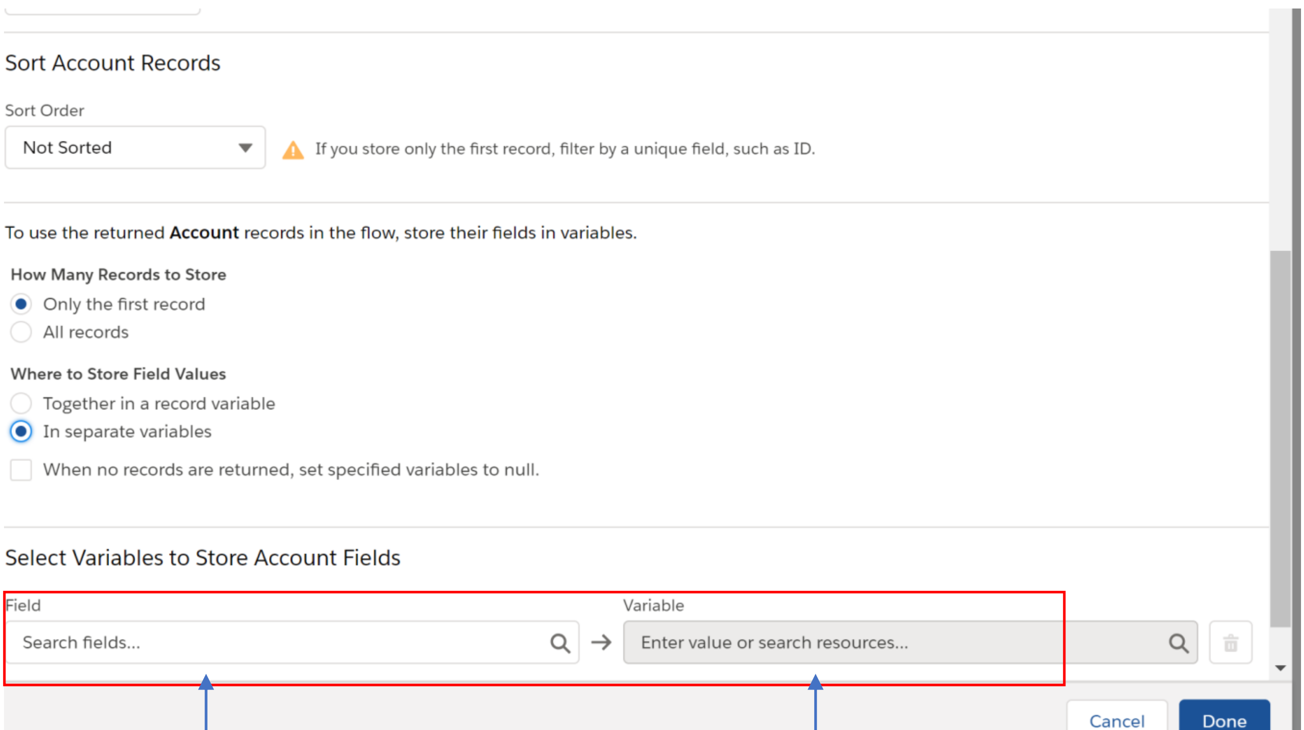
(we create one variable for each field we want to update)



6d

Now we will add each field we are updating. To do this, we need to create the field Variables that will be updated with the Account reference data for each field. We do this just like we created the Account ID Variable in Step 6a.

- For our demo it will be Shipping Street, Shipping City, Shipping State and Shipping Zip Code



Click and select the Acct field
Repeat for each field

Click and select New Resource
Repeat for each field

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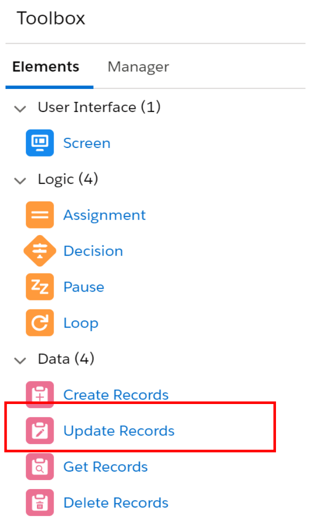
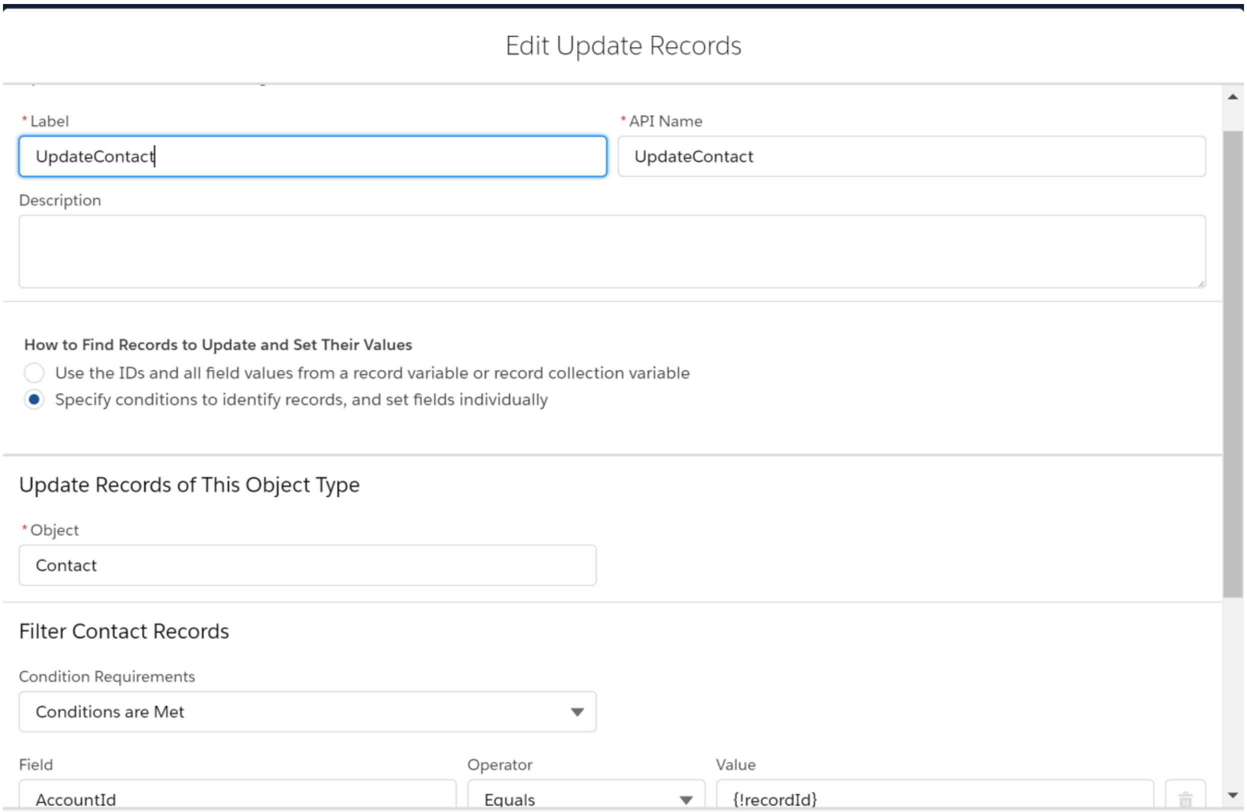


8a

Next we define what fields to be updated *(the Contact fields)*

- Add Label
- Description
- How to Find = Specify Conditions
- Select the Object
  (Contact)
- Condition Requirements = Conditions are Met
  - Field is the AccountId – same as Get Record in Step 6b.
  - Select the same Variable from Step 6b



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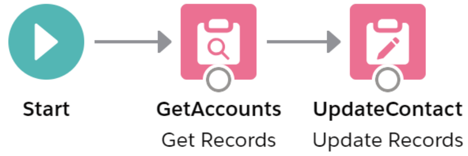
8b

Each Account field Variable we created in Step 6d will be mapped (the update) to a Contact field that we will define with Contact field Variables. Again we need to create a Variable for each field to be updated.

- For our demo it will be Mailing Street, Mailing City, Mailing State and Mailing Zip Code

9

Each Data section now gets connected to Start



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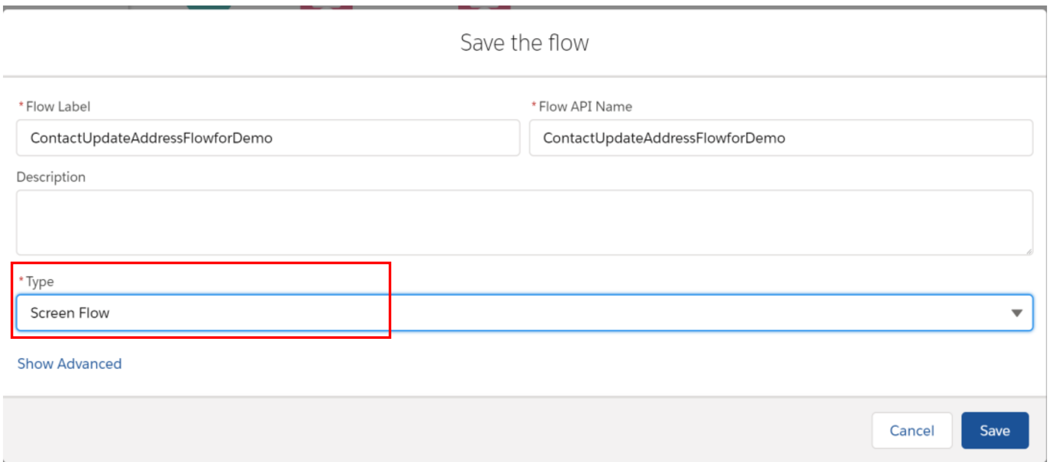
10

Save the Flow

- Type = Screen Flow

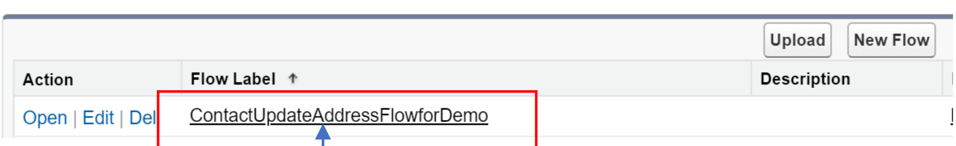
(Actions require Screen type)



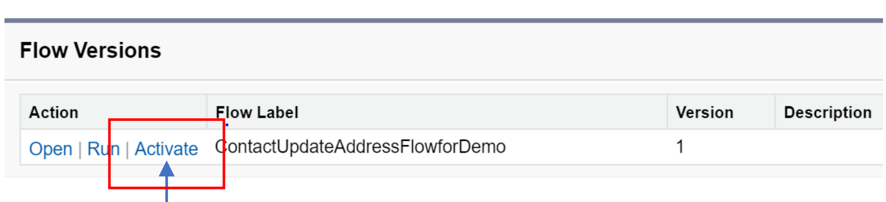
11

Activate the Flow

- Click on the Flow Name to get the to the Flow Versions screen
- Click Activate



Click on the Flow Label link



Activate

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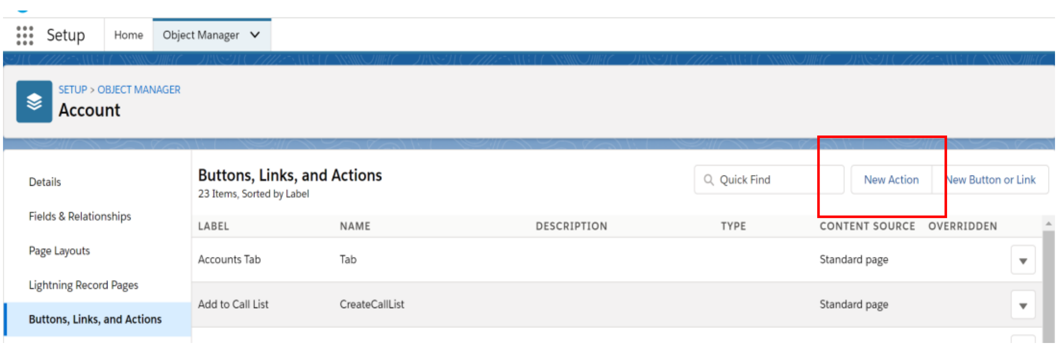
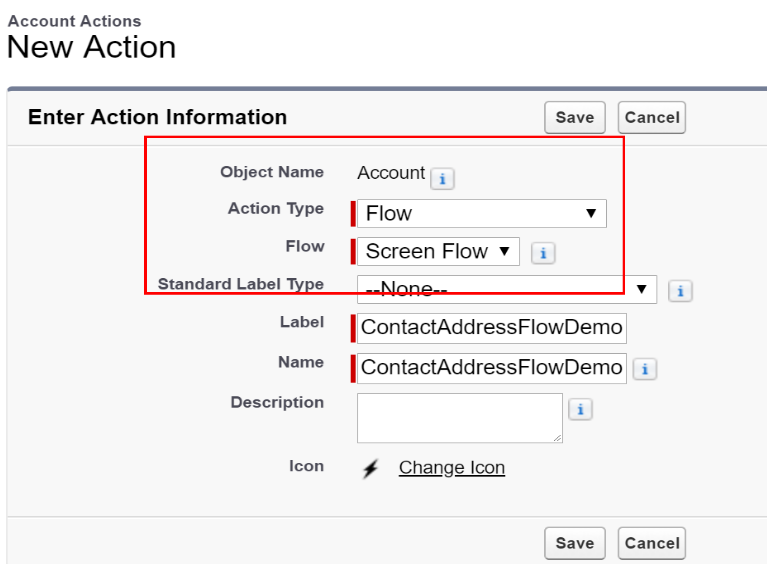
12

Create the Account Action

- Action Type = Flow
- Flow = Select the Flow we just created
- Standard Label Type = None (we are creating a custom label)
- Add a Label – this will be what the users see on the page
- Add a Description





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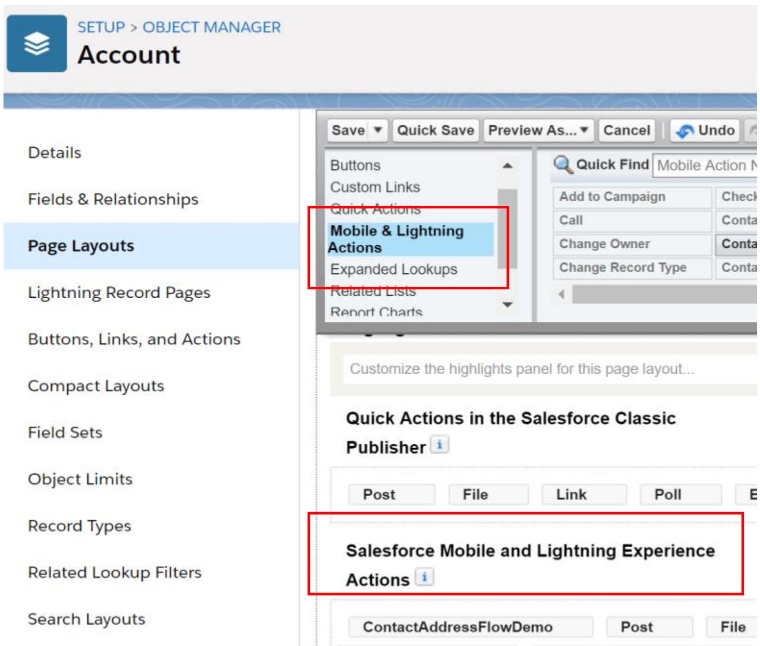
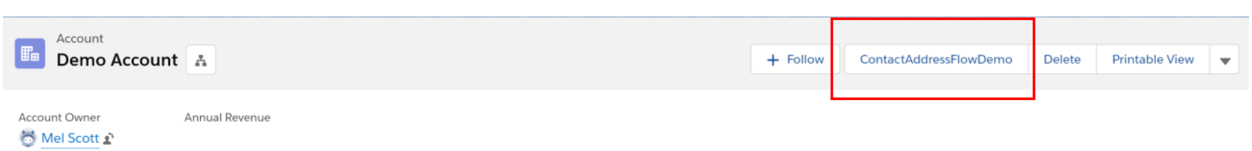
13 Add the Action to the Account Page Layout



The Action now appears on the Account Page Layout



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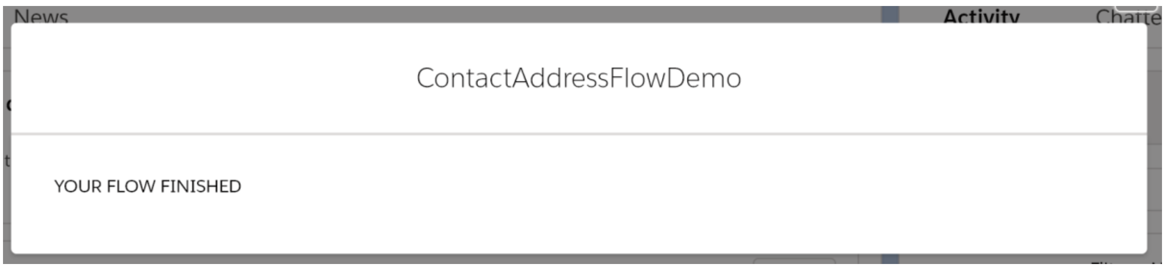
Each time you execute the Action a pop up appears confirming the flow has finished.



CONGRATULATIONS!

You have created an Account Action using a Flow!

Great Job!!

A few Flow Best Practices

Plan before you start building.
I usually draw out all the details of the business process. Helps me visualize it and I have a clear idea of what information I need, where I'm getting that information from and what logic and actions to perform. Keep things simple.

Now for the Obvious: Build your flows in a sandbox or Developer org.
The last thing you want to do is accidentally change records in production. Build your flows in a sandbox and enter test data. Test various permutations of your flow without worrying about changing or deleting data that your users actually need or use.

So this is Huge!. Save early and often.
You need to know that sometimes the Cloud Flow Designer falls victim to unexpected problems, like losing Internet access. Salesforce does a lot but it just doesn't save your changes automatically. So it's up to you to save your work. Save as often as possible to avoid accidentally losing a few hours' worth of work.

This best practice recommendation is borrowed: Test as many permutations of your flow as you possibly can.
As with all customizations in Salesforce, it's important to test your work. This is especially true if your flow uses branching or other complex logic. Make sure that you test as many possibilities as you can think of before you distribute the flow to your users.

Some thoughts on where you may want to use Flows

Feedback after a manual Event .
You can design a flow after a Case is closed or an Opportunity is won to send an email for feedback
You can use Flow to populate an email template

Action after a system event
Update a team or a customer if a shipment is delayed.
Update a opportunity team if there is news that is relevant.

Transfer record Ownerships
In reorgs or frequently updated territory trees. Transfer ownership of accounts from one user to another by using Object variable collections and loops.