Module 1:

Introduction To **Salesforce Flows**

Objectives

☐ **What is Salesforce Flows?**

☐ **Types of Flows**

☐ **Use Cases for Flows**

☐ **Order of Execution in Salesforce**

What is Salesforce Flows?

- Salesforce Flows is an automation tool built to <u>automate</u> business processes
- It is a <u>declarative</u> tool that does not require any coding skills
- Flows is the <u>future of automation</u> in Salesforce
- Flows are built in Flow Builder
- Part of the Platform since 2012 and has gone through different rounds of evolution. Previously also known as Visual Workflow, Lightning Flow, Cloud Flow Designer, Lightning Flow Designer etc.

Types of Flows

1
Screen-Flow

With Screen-Flow you can create a custom UI (user interface) and guide users through a business process that can be launched from Lightning Pages, Experience Cloud (previously known as Community Cloud), quick actions and more.

2
Record-Triggered Flow

This Flow launches when a record is created, updated, or deleted. So far, we have used Apex triggers for these automations some of which can now be done using Flows.

3
Scheduled Triggered Flow

This flow launches at the specified time and frequency for each record in a batch. Traditionally we have met this kind of requirement using Apex batch jobs.

4
Platform Event-Triggered Flow

Launches when a platform event message is received. For example, you can pump the data from external system in Platform Events and then use Flows to split and save the records in different objects.
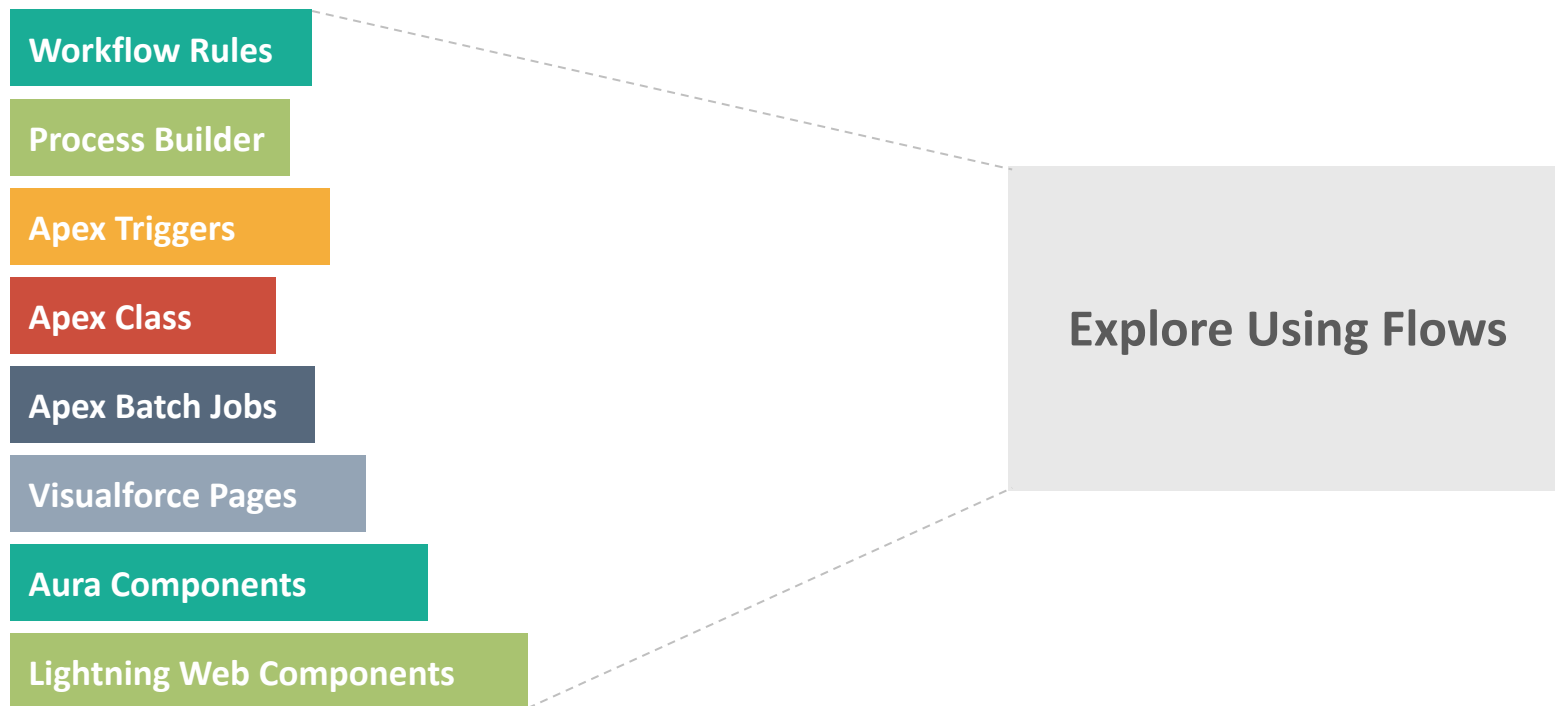
5
Auto-Launched Flow

Launches when invoked by Apex, Process Builder or even REST API

Benefits of Salesforce Flows

- Declarative point-and-click tool
- Can be invoked from multiple places
- Pre-built flows on AppExchange
- Continuous Enhancement by Salesforce
- Can be created as a template
- Concept of Flow versions

Rather Than Using These
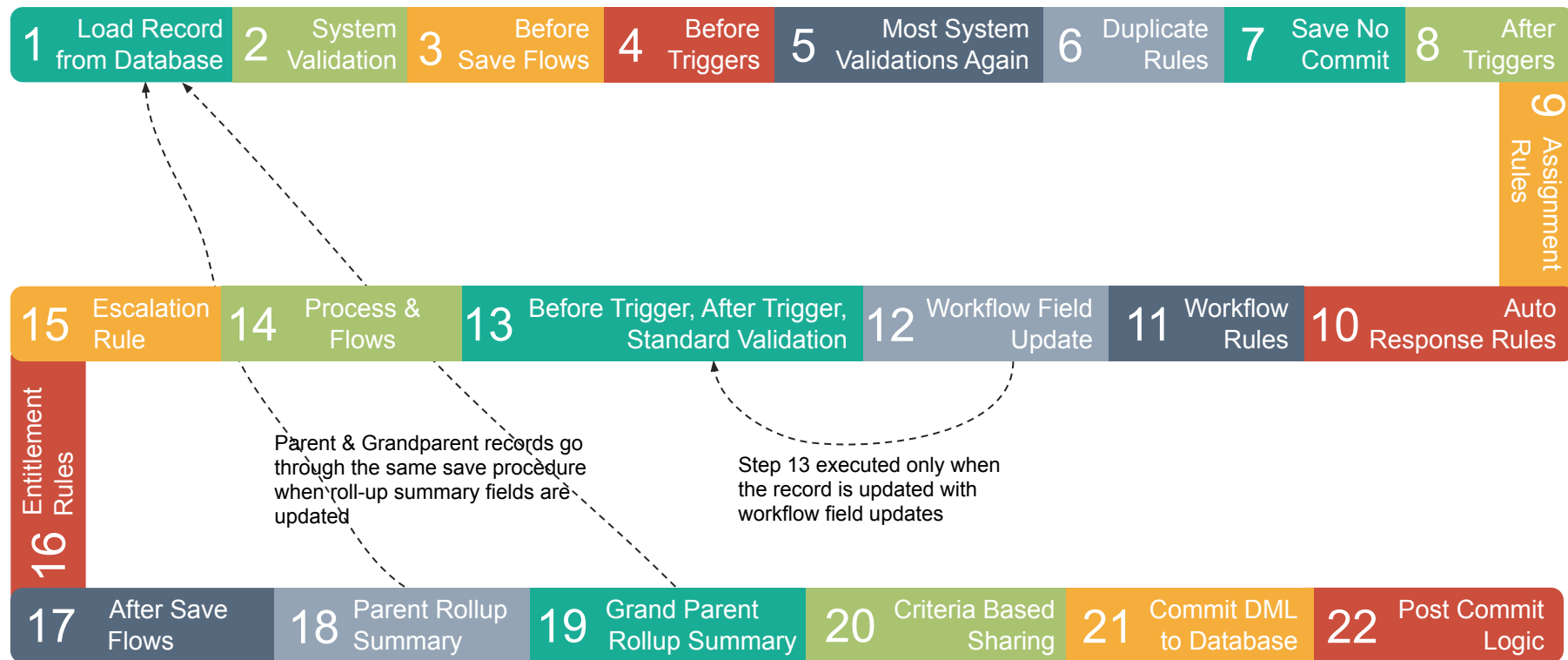
Workflow Rules

Process Builder

Apex Triggers

Apex Class

Apex Batch Jobs

Visualforce Pages

Aura Components

Lightning Web Components

Explore Using Flows

6

Use Cases for Using Flows

#	Use Case	Which Flow to use?	Where do we use it?
1	Guide users through a series of screens	Screen-Flow	Forms on the community for course/batch registration
2	Do some processing when a record is created or updated	Record-Triggered Flow	Sends Survey Completion Email to Admin once the reader completes the Survey
3	Schedule a job to run at a predefined interval	Scheduled-Triggered Flow	Update the Resource download count on the Blog
4	Update the order status as order goes through the various stages of fulfillment cycle in another system	Platform Event-Triggered Flow	N/A
5	Automatically create a contact whenever a new opportunity or case record is created and the contact record does not exist	Autolaunched Flow	Create a contact & task if the contact does not exist based on email address

Order of Execution in Salesforce

1 Load Record from Database
2 System Validation
3 Before Save Flows
4 Before Triggers
5 Most System Validations Again
6 Duplicate Rules
7 Save No Commit
8 After Triggers
9 Assignment Rules

15 Escalation Rule
14 Process & Flows
13 Before Trigger, After Trigger, Standard Validation
12 Workflow Field Update
11 Workflow Rules
10 Auto Response Rules

16 Entitlement Rules

Parent & Grandparent records go through the same save procedure when roll-up summary fields are updated

Step 13 executed only when the record is updated with workflow field updates

17 After Save Flows
18 Parent Rollup Summary
19 Grand Parent Rollup Summary
20 Criteria Based Sharing
21 Commit DML to Database
22 Post Commit Logic

Let's Recap

✓ **What is Salesforce Flows?**

✓ **Types of Flows**

✓ **Use Cases for Flows**

✓ **Order of Execution in Salesforce**

Questions