Welcome

Workshop: Mastering Salesforce Flows

Know Your Instructor

Ashish Agarwal

- 25 Years of Experience in IT, 12+ Years in Salesforce
- Independent Architect, Trainer & Blogger
- 26x Salesforce Certified | 2x AP | 1000+ Trailhead Badges
- Worked with Salesforce Singapore as Senior Program Architect

Blog: https://www.asagarwal.com
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Overview of the Course

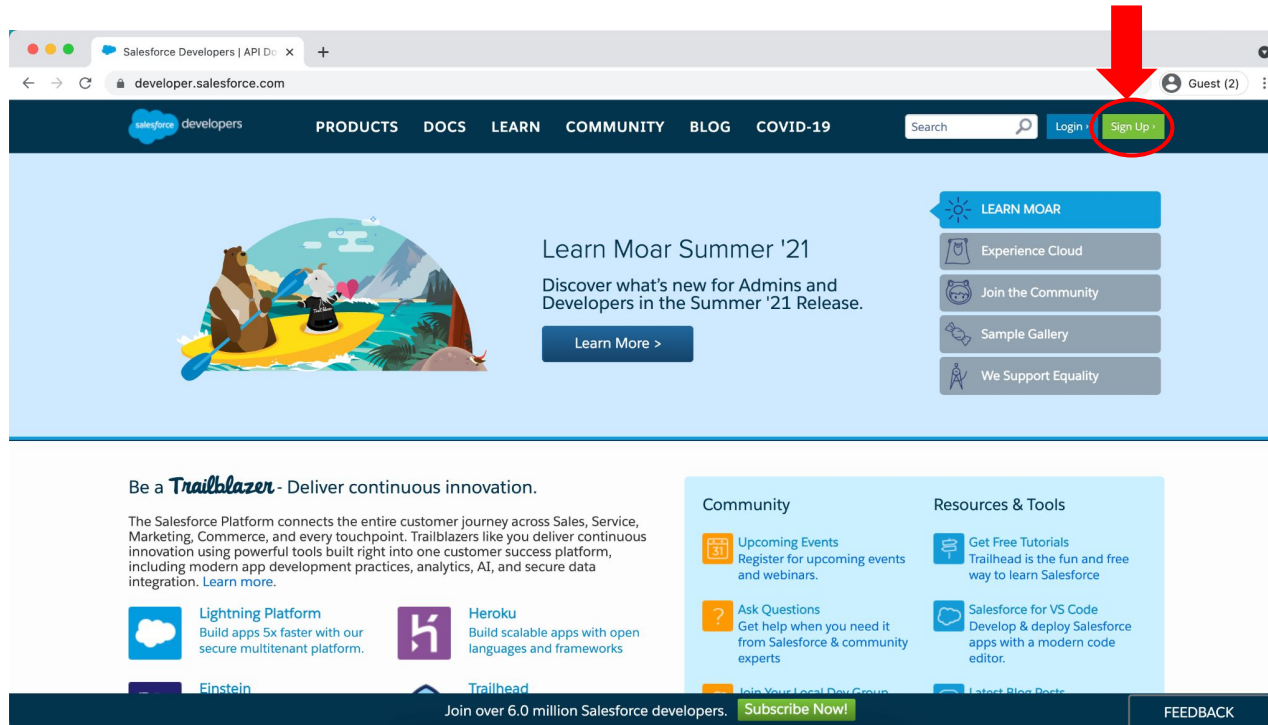| Module	Stage	Topic
1	Crawl	Introduction to Salesforce Flows
2	Crawl	Understanding the Building Blocks of a Flow
3.1	Walk	How To Create Record-Triggered Flow
3.2	Walk	How To Create Scheduled-Triggered Flow
3.3	Walk	How To Create Autolaunched Flow
3.4	Walk	How To Create Platform Event-Triggered Flow
3.5	Walk	How To Create Screen-Flow
4.1	Run	How To Use Fault Path in Flow
4.2	Run	How To Pause & Resume Flows

Overview of the Course

Module	Stage	Topic
4.3	Run	How To Use Flows with Apex
5.1	Fly	How To Use Flow Templates
5.2	Fly	Flow Limits & How to Debug Flows
5.3	Fly	Flow Best Practices
6	Fly	Migrating to Flows in Your Salesforce Org

Hands On Exercises

- **Please register for a new Developer Org prior to the workshop at URL https://developer.salesforce.com/**

Accessing the Course

1. Navigate to URL
https://courses.asagarwal.com/

2. Click on Login

Accessing the Course

1. Enter your username and password & click on Log In

Accessing the Course

1. Click on 'Mastering Salesforce Flows'

Accessing the Course

1. All the modules in the course are neatly laid out for you. Click on 'Start' from the first module and work your way down

Accessing the Course

1. By default, the video in the module will start autoplaying. To turn the autoplay off, click on the gear icon and toggle Autoplay off. Change other settings too if required

(*Tip: You may want to increase the speed for faster playback*)

2. Scroll down the screen

Accessing the Course

1. Below the video, you will find the link to download the PDF document

2. If you have any questions, comments, feedback or suggestions on the module, or need any assistance, please enter that here and we will respond to you as soon as we can

Accessing the Course

1. The left sidebar will show you the % complete and sections & modules for quick navigation

2. Click on the Play icon to play the training video. Below the video, you will find the link to download the PDF and also post your questions, comments or feedback on this module

3. Once you have completed the module, click on 'Complete and Continue'. This will update your progress for you to keep track of.

Accessing the Course

1. To log out of the course, click on the image on top right corner and click logout. Please do not forget to save the URL for the course and your password. You can now access this training, download the PDFs and ask questions at your own convenience.

How this Training is Structured?

Objectives

- ☐ **Configure Process Automation Settings**
- ☐ **How To Create a Flow?**
- ☐ **How to Deploy the Flow?**
- ☐ **Working with More Flow Elements**
- ☐ **How To Debug the Flow?**
- ☐ **Testing the Flow**
- ☐ **Granting Users Access to Run Flows**

At the beginning of the module, we will walk you through the objectives of that module

How this Training is Structured?

How this Training is Structured?

Begin With the End in Mind

We will also show you a demo of the end state of what we will be building in that module. In other words, we will begin with the end in mind. :-)

How this Training is Structured?

How To Create a Flow?

1. Search for 'Flows' in quick find and click on Flows

2. To create a new flow click on 'New Flow'

This will be followed by a demo of how to build Flows.

And at the same time, whatever steps that we will be following in the demo will be available to you in the PDF copy that contains the step-by-step instructions with screenshots. You will be able to download the PDFs & keep it.

How this Training is Structured?

Let's Recap

- ✓ **Configure Process Automation Settings**
- ✓ **How To Create a Flow?**
- ✓ **How to Deploy the Flow?**
- ✓ **Working with More Flow Elements**
- ✓ **How To Debug the Flow?**
- ✓ **Testing the Flow**
- ✓ **Granting Users Access to Run Flows**

In the end, we will do a quick recap of what we learnt in that module

How this Training is Structured?

It's Your Turn Now

➢ **Configure Process Automation Settings**

➢ **Create a Screen-Flow to create an account record and give the option to the user to send an email**

➢ **Embed the Screen-Flow on the Home Page**

➢ **Debug the Flow**

➢ **Test the Flow by creating an account record and sending email**

➢ **Create a user in your Salesforce Org, grant the user permission to run Flows and test the flow as that user**

And then, it will be time for you to do your lab exercises. We will tell you what you are supposed to accomplish in your lab exercise. You can follow the PDF to complete these exercises. The PDF contains step-by-step guide with screenshots to guide you all the way

How this Training is Structured?

Questions

But we will not leave your hand there. In every module, you will find a 'Discussion' area towards the bottom of the screen where you can ask questions related to that module. You can also share your comments, feedback and suggestions. Please do note that your comments will be visible to all the participants of the training and will facilitate collaborative learning

And Finally a Request

Let's be environment conscious. Please avoid taking print out of the study material, if you can.

Questions