



# Welcome

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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>  
Twitter: @asagarwal  
LinkedIn: <https://www.linkedin.com/in/asagarwal/>

# Overview of the Course

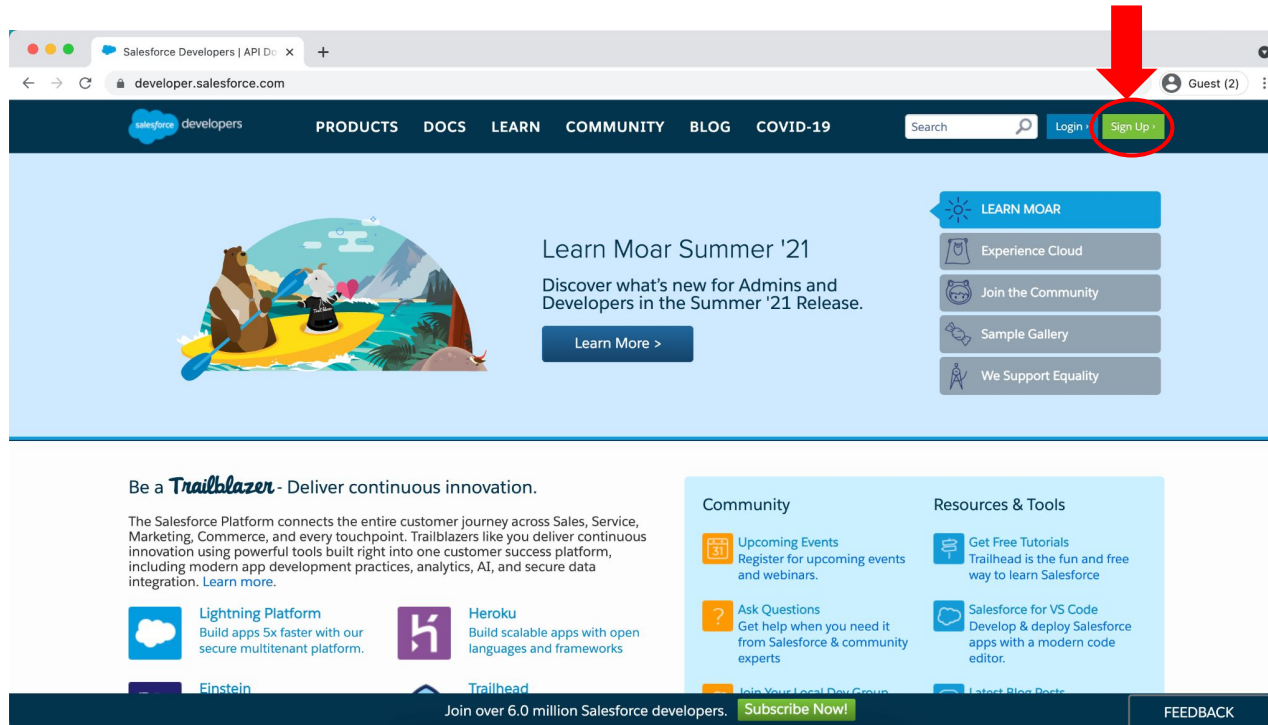
Module	Stage	Topic
1	Crawl	Introduction to Salesforce Flows
2	Crawl	Understanding the Building Blocks of a Flow
3.1	Walk	How To Create Record-Triggered Flow
3.2	Walk	How To Create Scheduled-Triggered Flow
3.3	Walk	How To Create Autolaunched Flow
3.4	Walk	How To Create Platform Event-Triggered Flow
3.5	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

The screenshot shows a web browser window with the address bar displaying 'courses.asagarwal.com'. A red box highlights the address bar with the text '1. Navigate to URL' and the URL 'https://courses.asagarwal.com/'. Another red box highlights the 'Login' button in the top right corner with the text '2. Click on Login'. The website header includes 'asagarwal.com' on the left and 'Login' on the right. The main content area features a large blue graphic with a cloud and circuitry, overlaid with the text 'Step-by-Step Guides, How-Tos, Workshops on Salesforce.com'. Below this is a section titled 'Featured Courses'.

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

2. Click on Login

asagarwal.com Login

**Step-by-Step Guides, How-Tos, Workshops on Salesforce.com**

**Featured Courses**

# Accessing the Course

asagarwal.com

Log in to asagarwal.com

Email Address

asagarwal.salesforce@gmail.com

Password

.....

Log In

[Forgot Password?](#)

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

[Privacy - Terms](#)

# Accessing the Course

The screenshot shows a web browser at the URL `courses.asagarwal.com`. The page features a dark header with the site name `asagarwal.com`, navigation links for `My Products` and `All Products`, and a user profile icon. Below the header, there are filters for `Category: All` and `Author: All`, and a search bar labeled `Find a product`. The main content area displays a course card for `Mastering Salesforce Flows` by `Ashish Agarwal`. The card includes a thumbnail image of a Salesforce Flow diagram, the course title, the author's name with a profile picture, and a progress indicator showing `0% COMPLETE`. A red callout box points to the course title with the instruction: `1. Click on 'Mastering Salesforce Flows'`.



# Accessing the Course

The screenshot shows a web browser at `courses.asagarwal.com/courses/enrolled/1468006`. The page displays the course curriculum for "Mastering Salesforce Flows". A red callout box highlights the first instruction: "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".

**Course Curriculum**

[Start next lecture](#) Welcome to Mastering Salesforce Flows (10:48)

**Welcome to Mastering Salesforce Flows**

0% COMPLETE

**Course Curriculum**

**Crawl - Understanding the Building Blocks of a Flow**

- [Start](#) Module 1 - Introduction to Salesforce Flows (18:43)
- [Start](#) Module 2 - Understanding the Building Blocks of a Flow (88:00)

**Walk - Getting Started with Flows**

- [Start](#) Module 3.1 - How To Create Record-Triggered Flow (58:44)
- [Start](#) Module 3.2 - How To Create Scheduled-Triggered Flow (69:30)

# Accessing the Course

The screenshot shows a web browser at [courses.asagarwal.com/courses/1468006/lectures/34205287](https://courses.asagarwal.com/courses/1468006/lectures/34205287). The course title is "Welcome to Mastering Salesforce". A settings menu is open, showing options for Autoplay, Autocomplete, and Speed (set to 1x). A red box highlights the first instruction: "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)". The left sidebar shows a progress bar at 0% COMPLETE and a list of modules: "Module 1 - Introduction to Salesforce Flows (18:43)", "Module 2 - Understanding the Building Blocks of a Flow (88:00)", "Module 3.1 - How To Create Record-Triggered Flow (58:44)", "Module 3.2 - How To Create Scheduled-Triggered Flow (69:30)", and "Module 3.3 - How To Create Autolaunched Flow (36:12)". The main content area displays a "Welcome:" message followed by "Workshop: Mastering Salesforce Flows". A red box highlights the second instruction: "2. Scroll down the screen".

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

Welcome to Mastering Salesforce Flows

0% COMPLETE

Welcome to Mastering Salesforce Flows (10:48)

Crawl - Understanding the Building Blocks of a Flow

- Module 1 - Introduction to Salesforce Flows (18:43)
- Module 2 - Understanding the Building Blocks of a Flow (88:00)

Walk - Getting Started with Flows

- Module 3.1 - How To Create Record-Triggered Flow (58:44)
- Module 3.2 - How To Create Scheduled-Triggered Flow (69:30)
- Module 3.3 - How To Create Autolaunched Flow (36:12)

Download

Module 0 - Welcome - Mastering Salesforce Flows.pdf

Discussion

Post a comment

Salesforce Ashish

Leave a comment...

Post Comment

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

The screenshot shows a web browser window with the URL `courses.asagarwal.com/courses/1468006/lectures/34205287`. The page title is 'Welcome to Mastering Salesforce Flows'. The left sidebar shows the course progress: '0% COMPLETE'. The main content area displays the first module, 'Module 1 - Introduction to Salesforce Flows (18:43)', with a play icon. Below the video, there is a 'Discussion' section with a 'Post a comment' button. A 'Complete and Continue' button is visible in the top right corner. Three red callout boxes provide instructions: 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.

Welcome to Mastering Salesforce Flows

0% COMPLETE

Welcome to Mastering Salesforce Flows (10:48)

Crawl - Understanding the Building Blocks of a Flow

Module 1 - Introduction to Salesforce Flows (18:43)

Module 2 - Understanding the Building Blocks of a Flow (88:00)

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Module 3.1 - How To Create Record-Triggered Flow (58:44)

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Discussion

Post a comment

Complete and Continue >

Post Comment

# Accessing the Course

The screenshot shows a web browser at [courses.asagarwal.com/courses/enrolled/1468006](https://courses.asagarwal.com/courses/enrolled/1468006). The page layout includes a sidebar on the left with a back arrow, a thumbnail of a Salesforce Flow diagram, and navigation links for 'Course Curriculum' and 'Your Instructor'. The main content area is titled 'Course Curriculum' and features a 'Start next lecture' button, a progress bar for 'Mastering Salesforce Flows' at 0% complete, and a list of modules. A dropdown menu is open in the top right corner, showing options: 'Edit Profile', 'Manage Subscriptions', 'Add / Change Credit Card', 'Address', 'Contact', and 'Log Out'. A red box highlights the 'Log Out' option.

**Course Curriculum**

[Start next lecture](#) Welcome to Mastering Salesforce Flows (10:48)

**Welcome to Mastering Salesforce Flows**

- [Welcome to Mastering Salesforce Flows \(10:48\)](#)

**Crawl - Understanding the Building Blocks of a Flow**

- [Module 1 - Introduction to Salesforce Flows \(18:43\)](#)
- [Module 2 - Understanding the Building Blocks of a Flow \(18:43\)](#)

**Walk - Getting Started with Flows**

- [Module 3.1 - How To Create Record-Triggered Flow \(58:44\)](#) [Start](#)
- [Module 3.2 - How To Create Scheduled-Triggered Flow \(69:30\)](#) [Start](#)

**Mastering Salesforce Flows**

0% COMPLETE

[Course Curriculum](#)

[Your Instructor](#)

[Log Out](#)

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.

[https://courses.asagarwal.com/sign\\_out](https://courses.asagarwal.com/sign_out)

# 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?

## Business Use Case

### Context

SIAA Enterprises sales users have a concern that when an Account address changes, they have to manually update all Contacts' address in Salesforce. The management wants to automate this process to save the users' time and efforts.



Andy  
Product Owner

Amanda, our sales users are complaining that they have to spend considerable time on updating related Contacts' addresses when an Account address changes. It is quite inconvenient & time consuming for them. Is there a way we can automate this in Salesforce?



Sure Andy, it can be done either using a Process Builder or a Flow. But since Flow is the future of automation in Salesforce, I'll recommend Flow. So, a simple Flow with update records feature will do the trick and take the burden off the reps.

**Then we will give you the business requirements and use case, that we will be working on in that module. This will not only help you understand the technical aspects of the module, but will also give you the business context**



# How this Training is Structured?

## Begin With the End in Mind

The screenshot displays the Salesforce Sales Console for the account 'United Oil & Gas Corp.'. The interface is divided into three main sections:

- Left Sidebar:** Contains account details such as 'Type: Customer - Direct', 'Phone: (212) 842-5500', 'Website: http://www.uos.com', 'Account Owner: Ashish Agarwal', and 'Industry: Energy'.
- Main Table:** A table of fields for the account, including 'Account Owner', 'Account Name', 'Parent Account', 'Account Number', 'Account Site', 'Type', 'Industry', 'Annual Revenue', 'No. of Open Cases', 'Billing Address', 'Rating', 'Phone', 'Fax', 'Website', 'Ticker Symbol', 'Ownership', 'Employees', 'SIC Code', and 'Shipping Address'.
- Right Panel:** Displays a message 'We found no potential duplicates of this Account.' and a list of 'Contacts (3+)' including Lauren Boyle, Avi Green, and Stella Pavlova.

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

