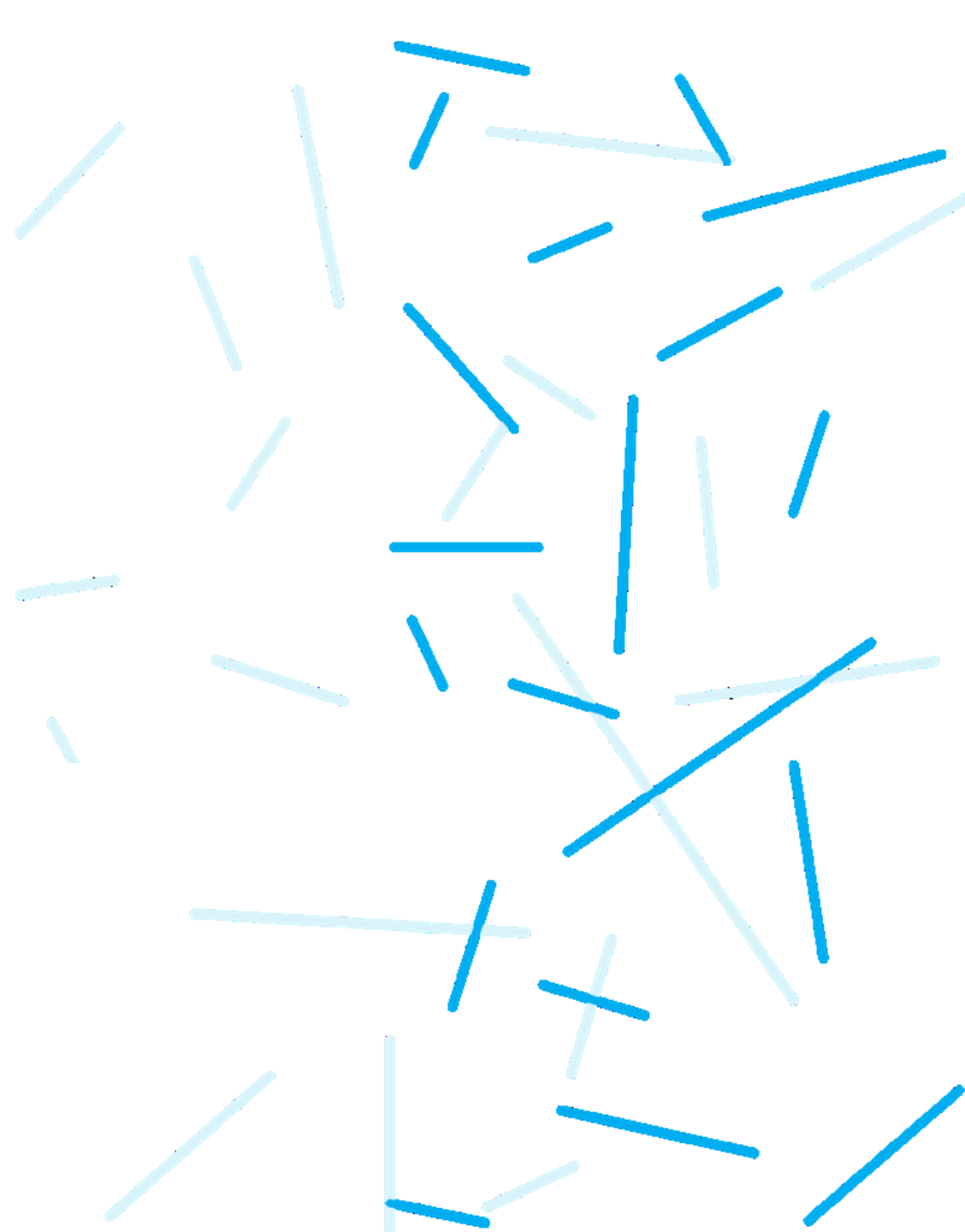


Automatizace

14. listopadu 2023

Martin Humpolec



Martin

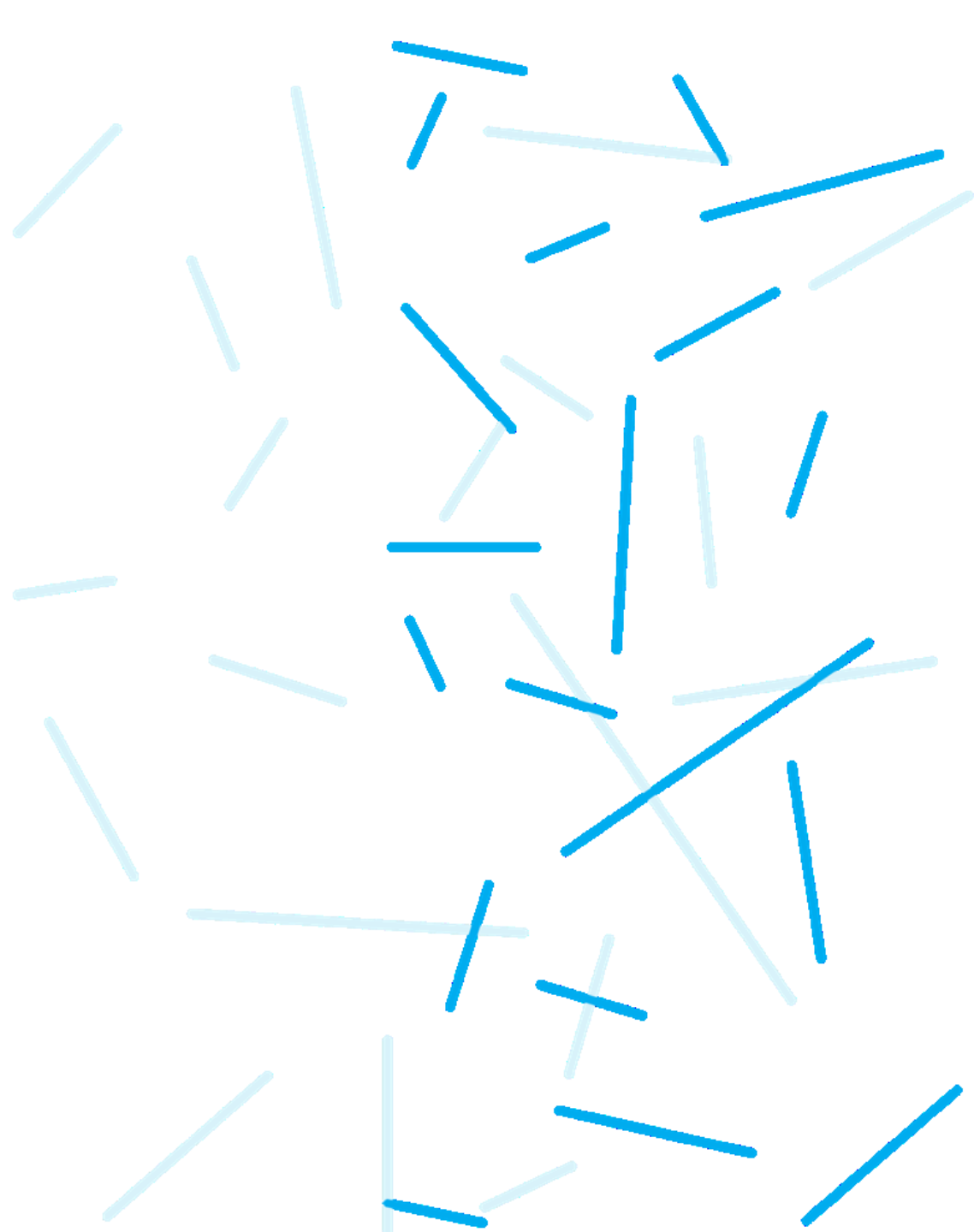
- Flownatic
- Trailhead freak
- Certification lover
- Salesforce CTA
- Salesforce MVP
- Prague User Group Leader
- CzechDreamin co-founder (CzechDreamin.com)
- Blogger (MartinHumpolec.cz)
- volunteer and consultant (CRM pro neziskovky)

ACTUM
Digital



Co je dneska na progr

- **Workflow**
- **Process Builder**
- **Approval Processes**
- **Flow**



Nebo možná?

- **Declarative way** □
 - Out of the box point and click, drag and drop tools □
 - No programming knowledge needed □
 - Time and cost effective □
 - Easier maintenance (cost wise) □
 - Fast growing □
-
- **Programmatic way** □
 - APEX (JAVA – like language) □
 - Build specifically for SF □
 - Requires OOP knowledge □
 - Resources are scarces and expensive □
 - SF pushes for “declarative before custom” approach □

Nebo také?

- Assignment Rules
- Escalation Rules
- Validation Rules
- Formula fields
- Einstein Next Best Action
- Notification Builder
- And much more...

Days to Close (Number) =

CloseDate - TODAY()

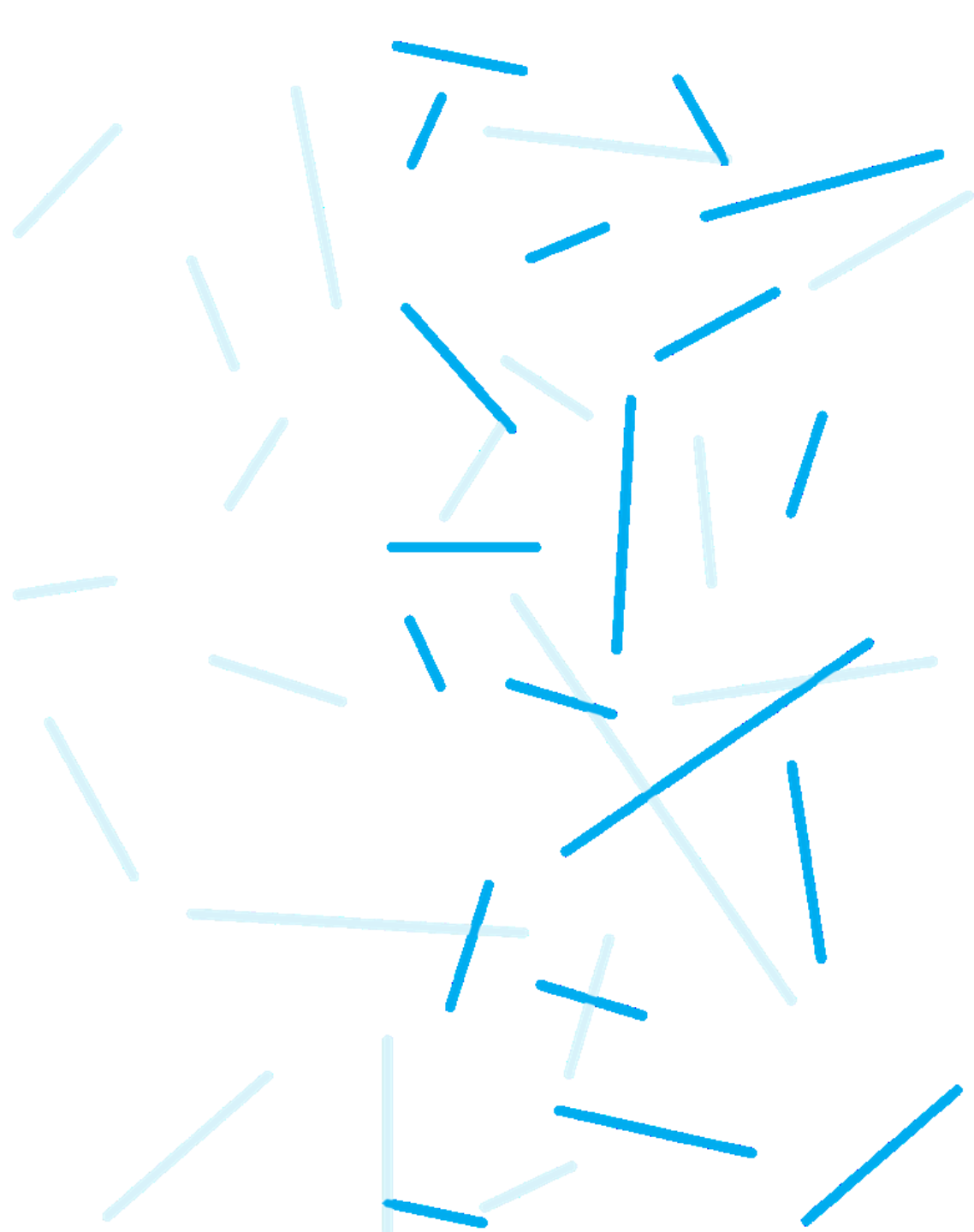
No syntax errors in merge fields or functions. (Compiled size: 30 characters)

Account Rating

This formula evaluates Annual Revenue, Billing Country, and Type, and assigns a value of "Hot," "Warm," or "Cold."

```
IF (AND (AnnualRevenue > 10000000,  
CONTAINS (CASE (BillingCountry, "United States", "US", "America", "US", "USA", "US", "NA"), "US")),  
IF(ISPICKVAL(Type, "Manufacturing Partner"), "Hot",  
IF(OR (ISPICKVAL (Type, "Channel Partner/Reseller"),  
ISPICKVAL(Type, "Installation Partner")), "Warm", "Cold")),  
"Cold")
```

Mělo by zaznít



Workflow



Process Automation

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Send Actions

Tasks

Workflow Rules

Environments

Monitoring

Time-Based Workflow

Workflow Rule
Renewal Notice
[Back to List: Workflow Rules](#) Help for this Page

Workflow Rule Detail Edit Clone Deactivate

Rule Name	Renewal Notice	Object	Organization
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	Sends a notification to Operations team and an account owner that it is time to renew a subscription to a client.		
Rule Criteria	(Organization: Number of manual invoices in last 2Y GREATER OR EQUAL 1) AND (Organization: Trial EQUALS False) AND (Organization: Edition NOT EQUAL TO ACADEMIC,DEVELOPER,PERSONAL,TEST)		
Created By	13/05/2019 16:09	Modified By	11/06/2019 14:32

Workflow Actions Edit

Immediate Workflow Actions

No workflow actions have been added.

Time-Dependent Workflow Actions [See an example](#)

45 Days Before Organization: Expires

Type	Description
Email Alert	Sends reminder 45 days before the expiration date

Process Builder



The screenshot displays the Salesforce Process Builder interface. On the left, a flowchart starts with a 'START' node, followed by an 'Account' object. It then branches into three decision diamonds based on account size and type:

- Decision 1:** 'Micro : <50 : LSP/Enterprise'. If TRUE, it triggers 'IMMEDIATE ACTIONS' including 'Opportunity Team ...'. If FALSE, it proceeds to the next decision.
- Decision 2:** 'SME : 51-100 : LSP/Enterprise'. If TRUE, it triggers 'IMMEDIATE ACTIONS' including 'Opportunity Team ...'. If FALSE, it proceeds to the next decision.
- Decision 3:** 'SME : 101-200 : LSP/Enterprise'. If TRUE, it triggers 'IMMEDIATE ACTIONS' including 'Opportunity Ultima...'. If FALSE, it ends the process.

Each 'IMMEDIATE ACTIONS' box includes an 'Add Action' button. After each action group, there is a button labeled 'EVALUATE THE NEXT CRITERIA'.

On the right, the 'Define Criteria for this Action Group' panel is shown. It includes the following configuration options:

- Criteria Name:** Micro : <50 : LSP/Enterprise
- Criteria for Executing Actions:** Conditions are met, Formula evaluates to true, No criteria—just execute the actions!
- Set Conditions:** A table with 4 rows of conditions.
- Conditions:** All of the conditions are met (AND), Any of the conditions are met (OR), Customize the logic
- Logic:** 1 AND 2 AND (3 OR 4)
- Advanced:** > Advanced

Field *	Operator *	Type *	Value *
1 [Account].Marke... Q	Equals	Picklist	Micro
2 [Account].Comp... Q	Equals	Picklist	Less than 50
3 [Account].Segm... Q	Equals	Picklist	LSP
4 [Account].Segm... Q	Equals	Picklist	Enterprise

Approval Processes



Process Definition Detail

[Edit](#) [Clone](#) [Deactivate](#)

Active

Process Name	Framework Approval	Next Automated Approver Determined By
Unique Name	Framework_Approval	
Description		
Entry Criteria	(Agreement: Agreement Approval Status EQUALS draft,rejected) AND (Agreement: Record Type EQUALS Framework)	
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests <input type="checkbox"/>
Approval Assignment Email Template	Framework Agreement Approval Request	
Initial Submitters	Account Owner, Group: All Internal Users	
Created By	Martin Humpolec , 21.3.2020 21:06	Modified By Martin Humpolec , 29.1.2021 15:23

Initial Submission Actions

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit Remove	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Agreement Sent for approval

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit	1	Step1			Approval based on first response User.	Final Rejection

Final Approval Actions

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Field Update	Agreement Approved
Edit Remove	Email Alert	Approved
Edit Remove	Field Update	approved.framework.recordtype

Final Rejection Actions

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Field Update	Agreement Rejected
Edit Remove	Email Alert	Agreement Rejected

Recall Actions

[Add Existing](#) [Add New](#)

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

Approval Processes



Process Instance Step

Agreement Approval Approved

Submitter	Date Submitted	Actual Approver	Assigned To
Martin Humpolec	30.1.2020	Martin Humpolec	Martin Humpolec

Details

Approval Details

Agreement Number	A-0000001	Company Authorized By	Martin Humpolec
Customer Authorized By	Martin Humpolec	Provider	
Jurisdiction ⓘ	Czech Republic	Effective Date	29.1.2020
Penalty for Breach ⓘ	12	Protection Period ⓘ	12

Flow



Flow prakticky



Zadání

Přesné sepsání co se má dít

Zamyšlení nad všemi
možnostmi a vazbami



Klikání



Úspěch

Spokojený uživatel



















Flow



New Flow

Core **All + Templates**

- All
- Screen Flow
- Autolaunched Flow
- Contact Request Flow
- Lightning Scheduler Flow
- User Provisioning Flow

 Screen Flow Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.	 Record-Triggered Flow Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
 Schedule-Triggered Flow Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.	 Platform Event-Triggered Flow Launches when a platform event message is received. This autolaunched flow runs in the background.
 Autolaunched Flow (No Trigger) Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.	 User Provisioning Flow Create a user account and link it to a third-party service or app.
 Lightning Scheduler Flow Create a new flow for use in Lightning Scheduler Flow.	 Contact Request Flow Create self-service forms to collect contact details.
 Cancel Item Flow Order Management: Cancel order items before fulfillment.	 Create a Case
 Create Order Summary Flow Order Management: Create an Order Summary record from an order.	 Create Process Exception Flow Create a process exception record from a process exception event.
 Discount Flow Order Management: Apply discounts to an order.	 Inbound Cancel Appointment
 Inbound Modify Appointment	 Inbound New Appointment


Next

Flow




New Flow

Core All + Templates




Screen Flow

Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.




Record-Triggered Flow

Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.




Schedule-Triggered Flow

Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.



Platform Event-Triggered Flow

Launches when a platform event message is received. This autolaunched flow runs in the background.

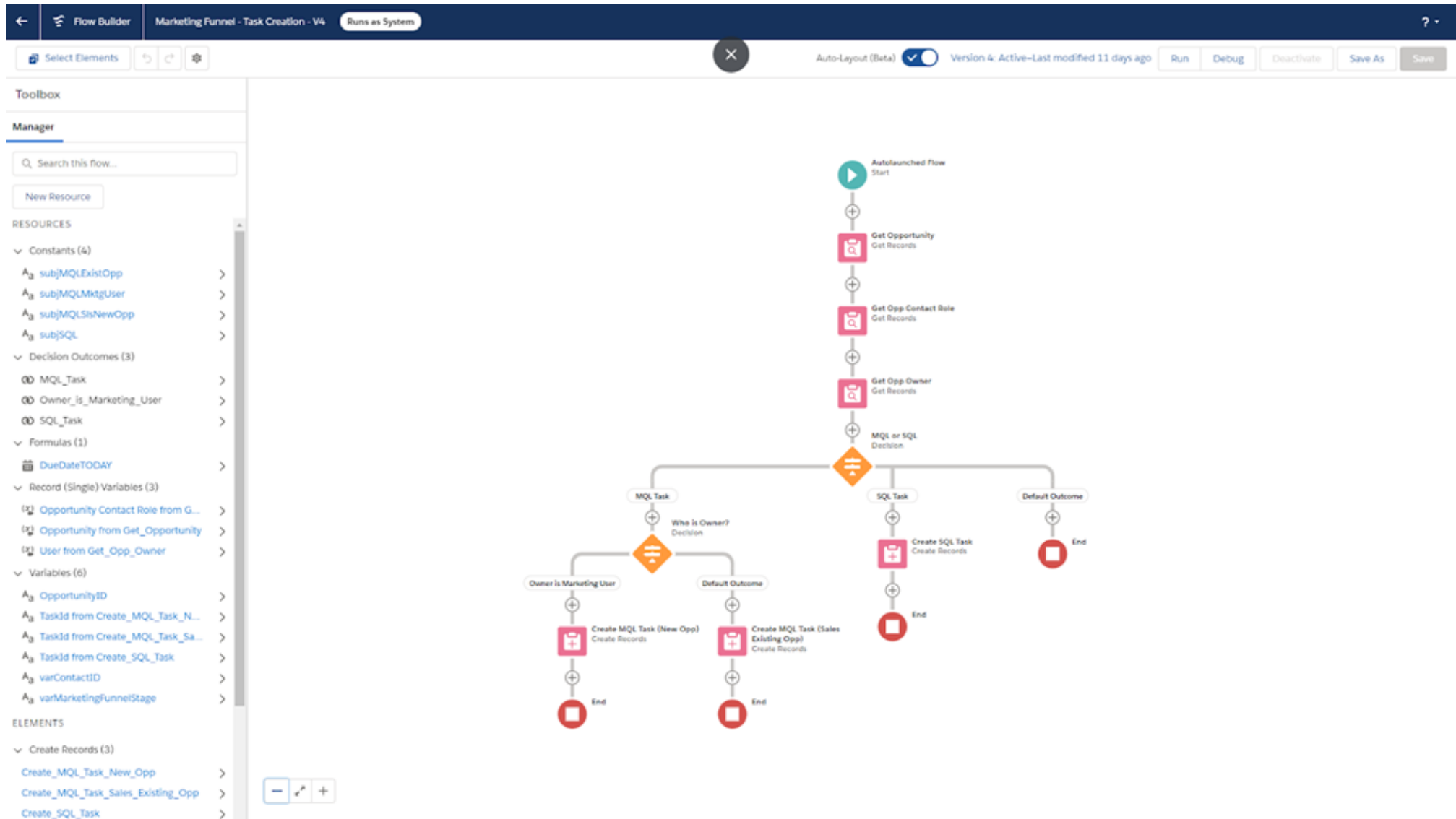


Autolaunched Flow (No Trigger)

Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

Next

Flow



Flow prakticky



1. průvodce tvorbou zakázky, firmy a kontaktu
2. na zakázce ukaž další zakázky v daném měsíci
3. pojmenování zakázky podle firmy
4. upozornění na starou neuzavřenou zakázku

Další zdroje



- <https://unofficialsf.com/>
- <https://jenwlee.com/>
- <https://automationchampion.com/>



Co dal? F

