Automatizace

14. listopadu 2023

Martin Humpolec

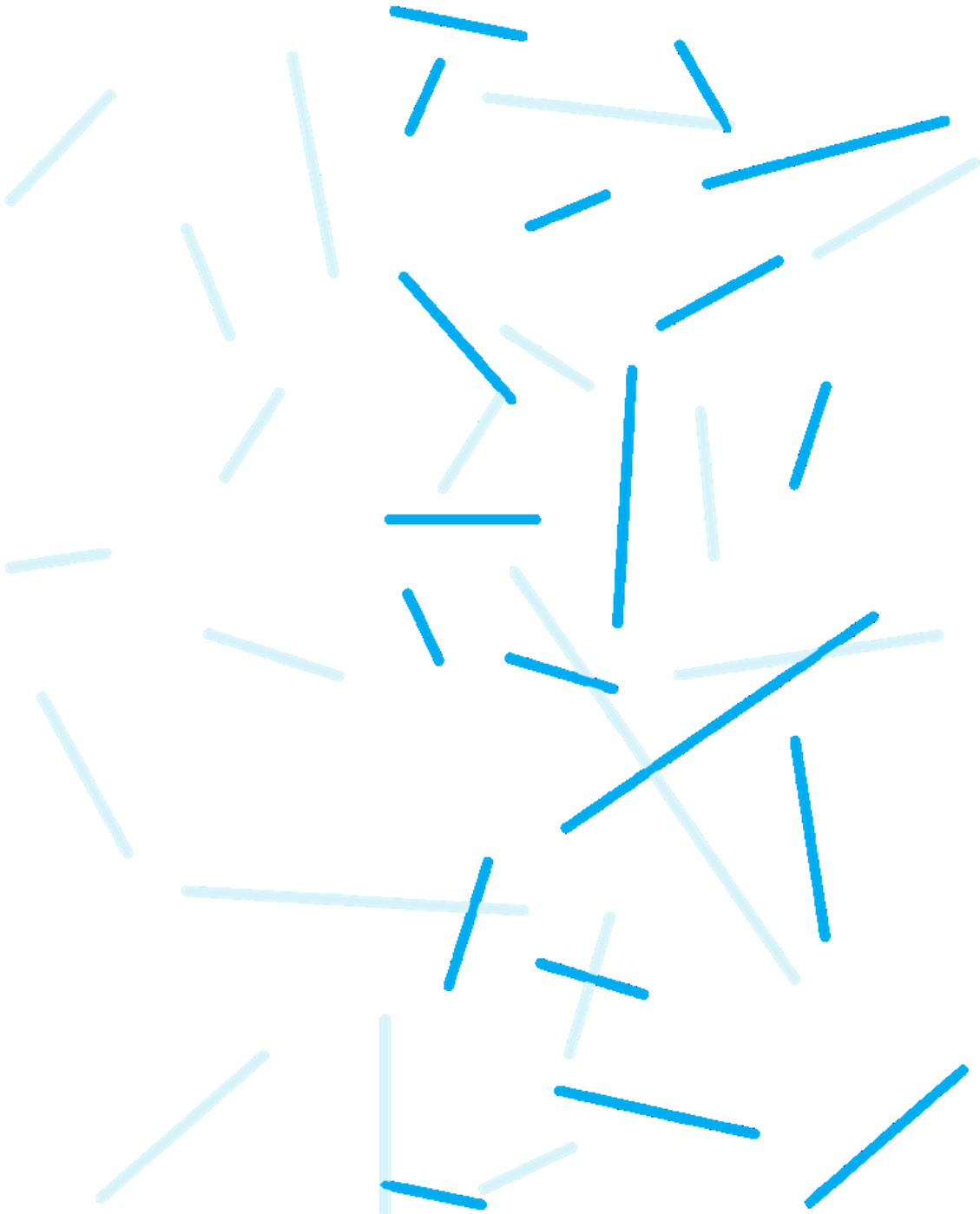
Martin

- 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?

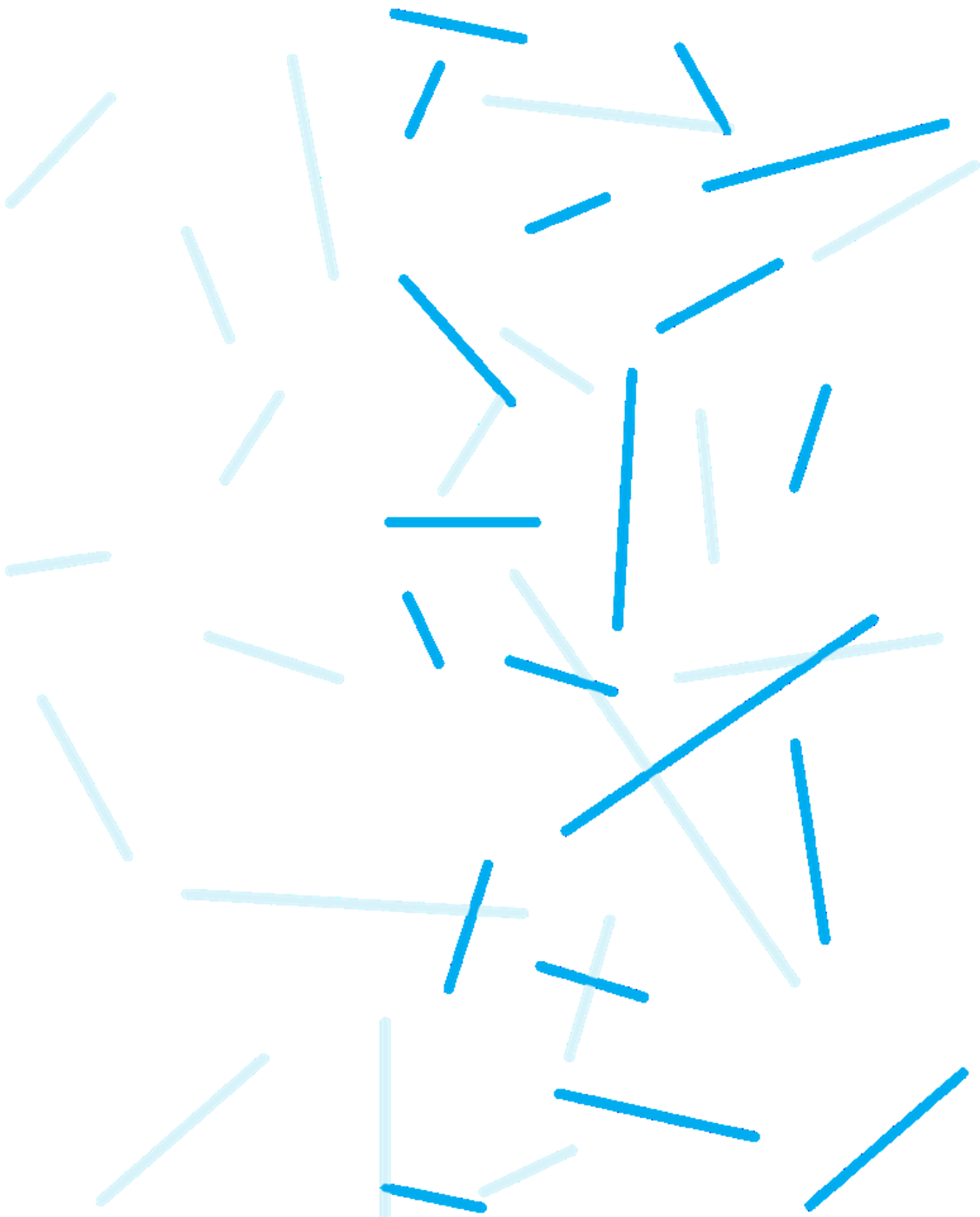
- **Declarative way**
  - Out of the box point and click, drag and drop tools
  - No programming knowledge needed
  - Time and cost effective
  - Easier maintenance (cost wise)
  - Fast growing

- **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…

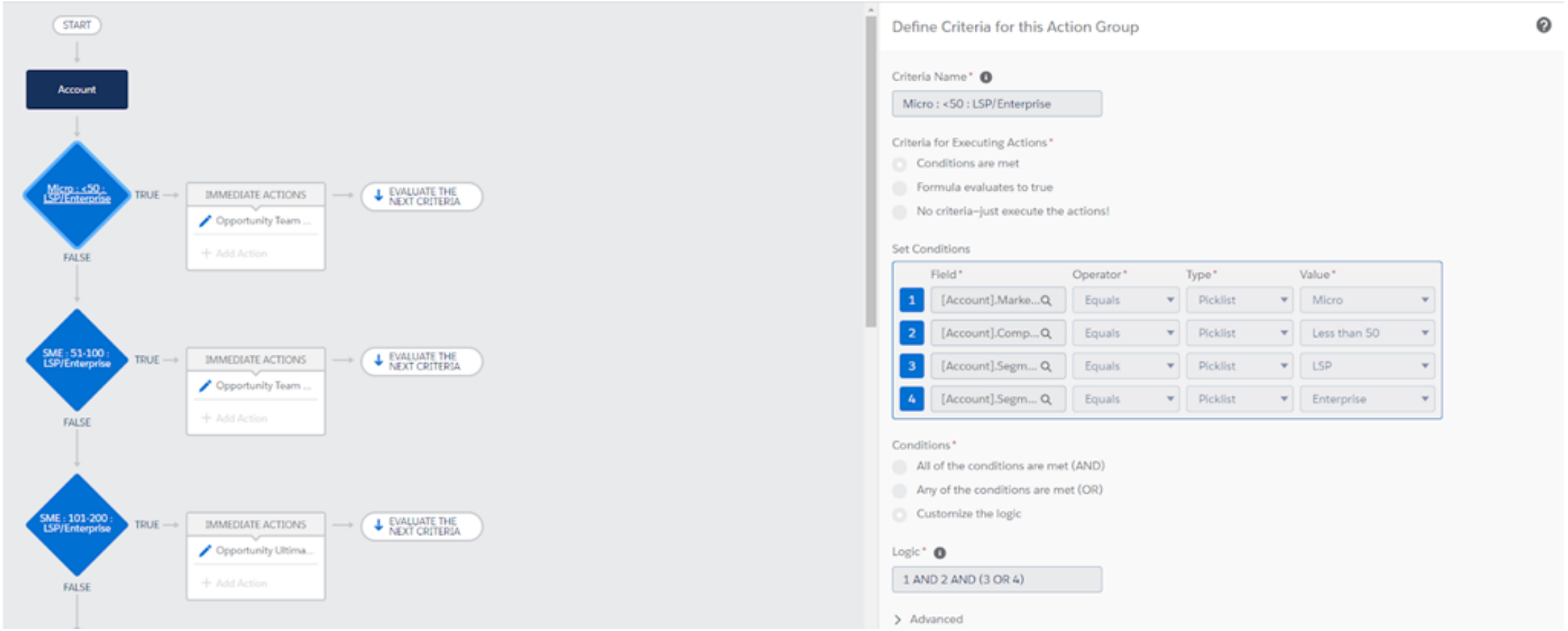
Mělo by zaznít



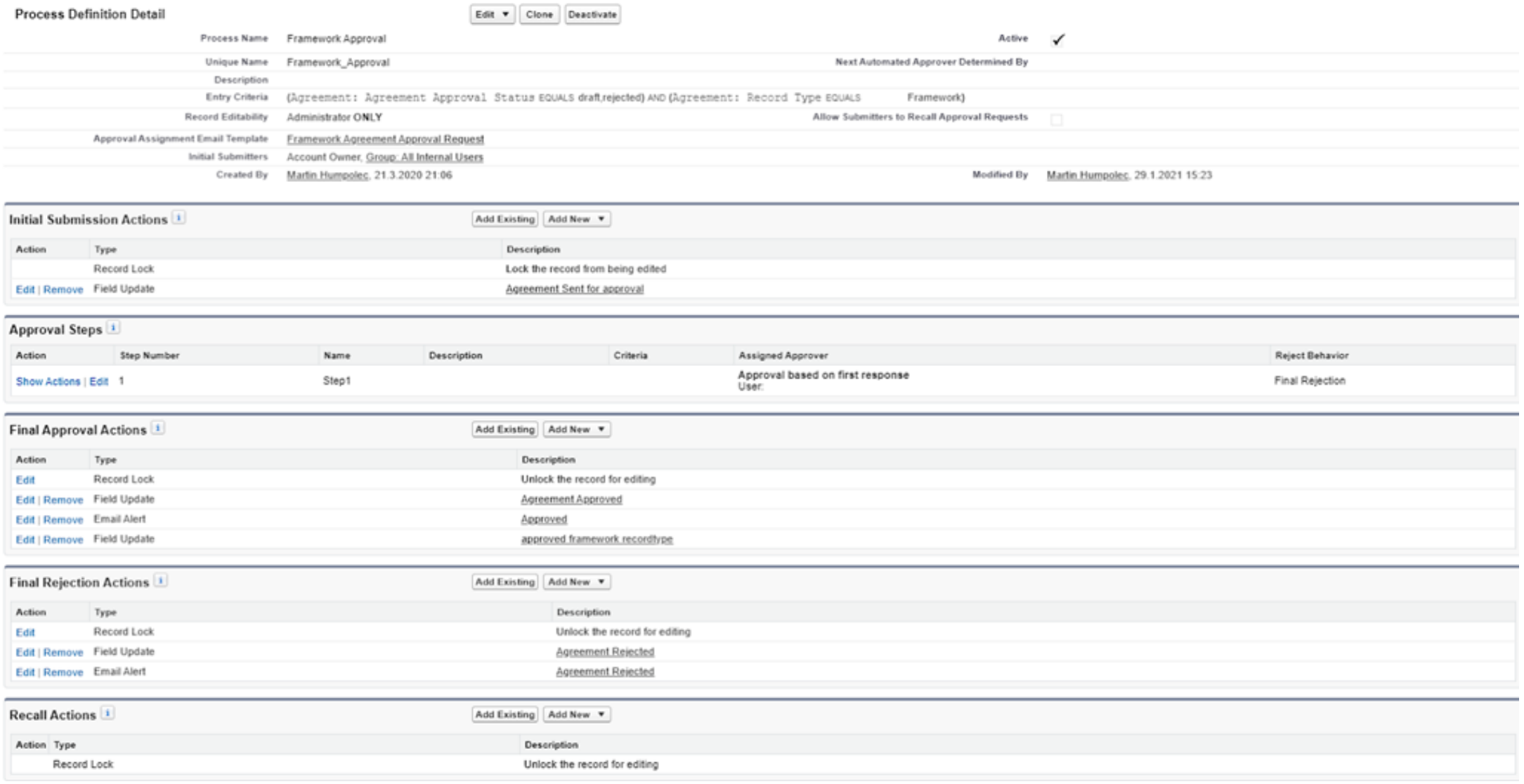
Workflow

- Process Automation
  - Workflow Actions
    - Email Alerts
    - Field Updates
    - Outbound Messages
    - Send Actions
    - Tasks
    - Workflow Rules
- Environments
  - Monitoring
    - Time-Based Workflow

Process Builder



Approval Processes



Process Definition Detail

Edit | Clone | Deactivate

Process Name	Framework Approval	Active	✓
Unique Name	Framework_Approval	Next Automated Approver Determined By	
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	☐
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
	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

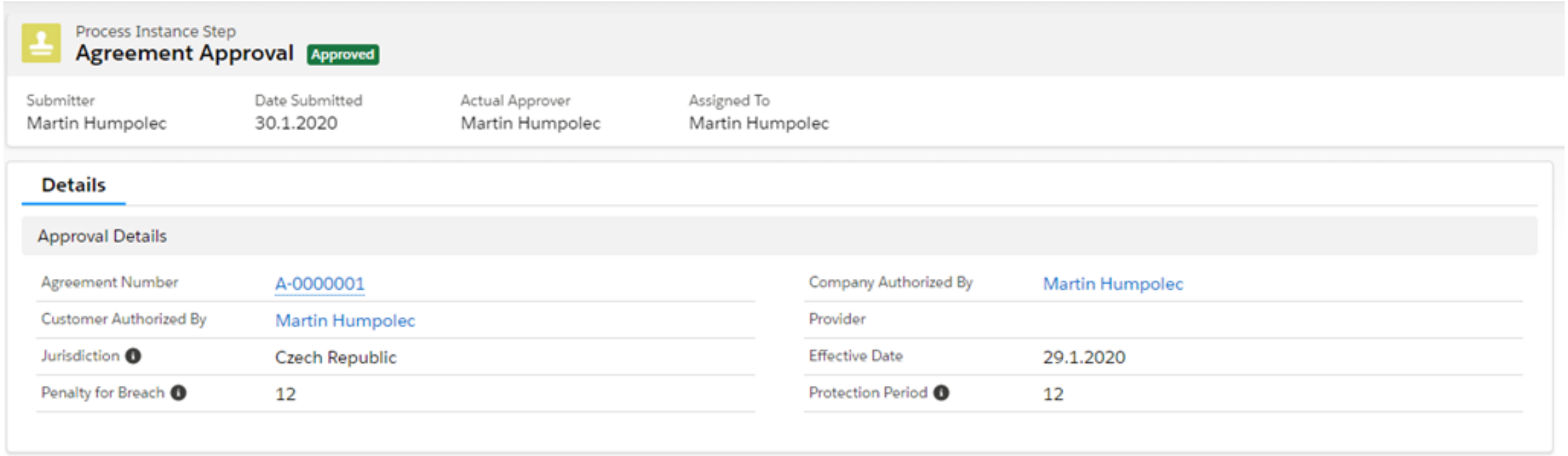
Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit | Remove	Field Update	Agreement Rejected
Edit | Remove	Email Alert	Agreement Rejected

Recall Actions

Add Existing | Add New

Action	Type	Description
	Record Lock	Unlock the record for editing

Approval Processes



Flow

Flow prakticky

1

Zadání

Přesné sepsání co se má dít

Zamyšlení nad všemi možnostmi a vazbami

2

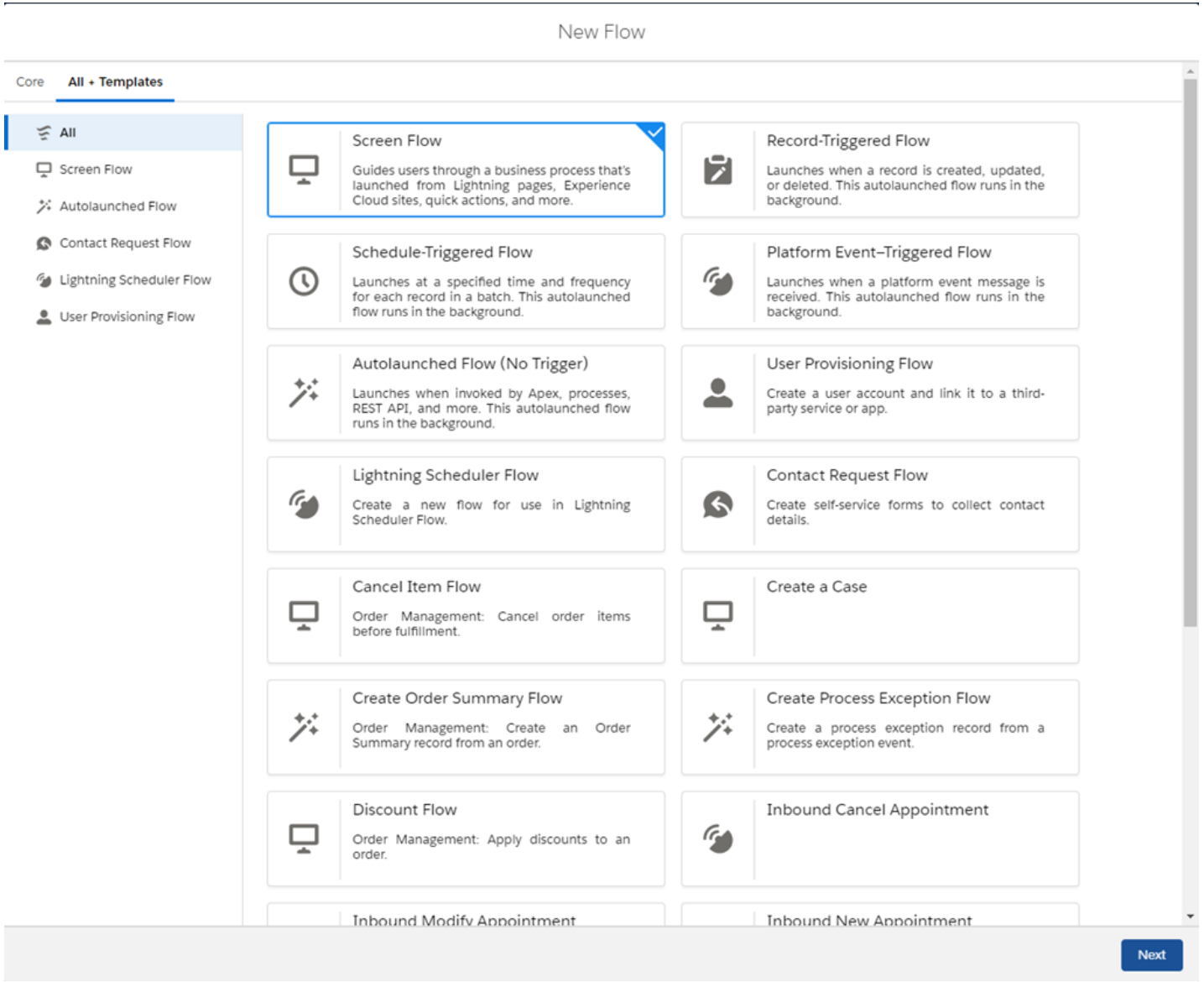
Klikání

3

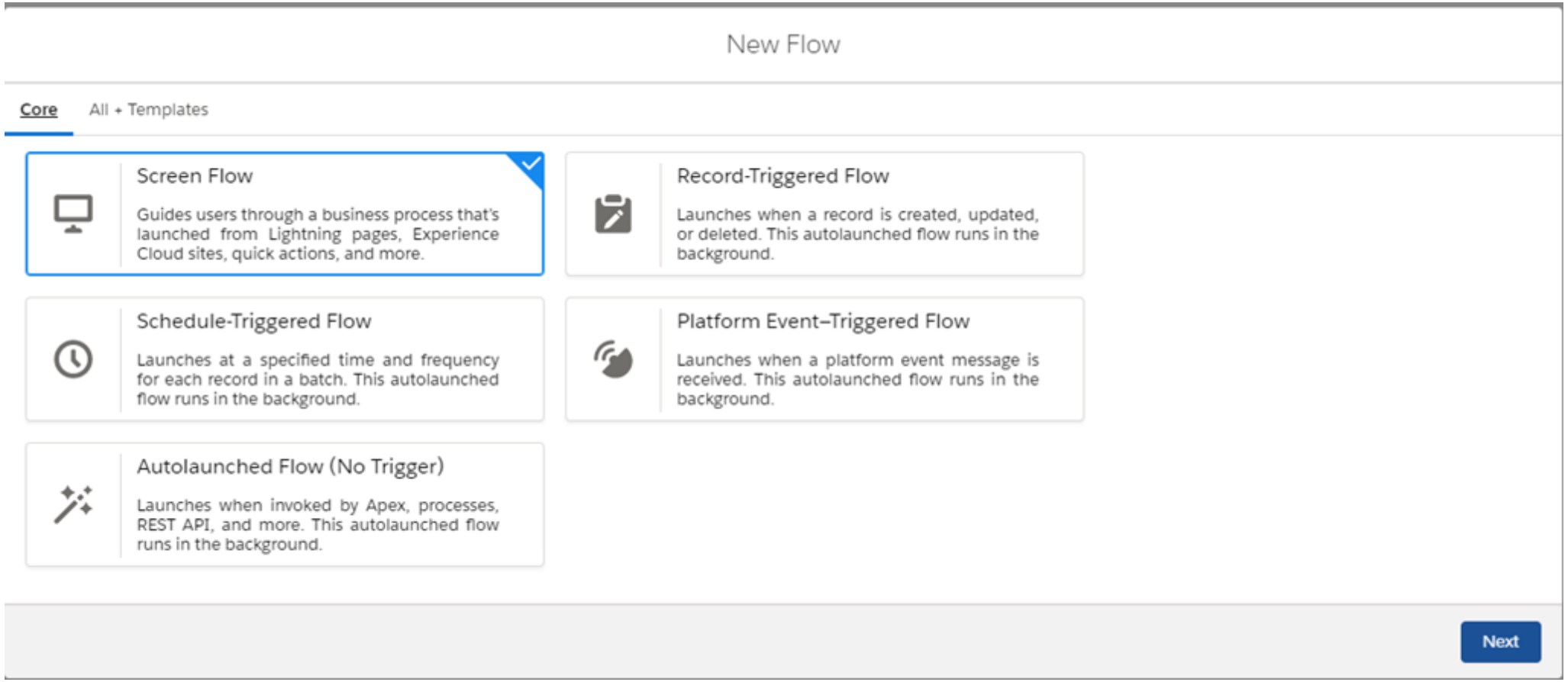
Úspěch

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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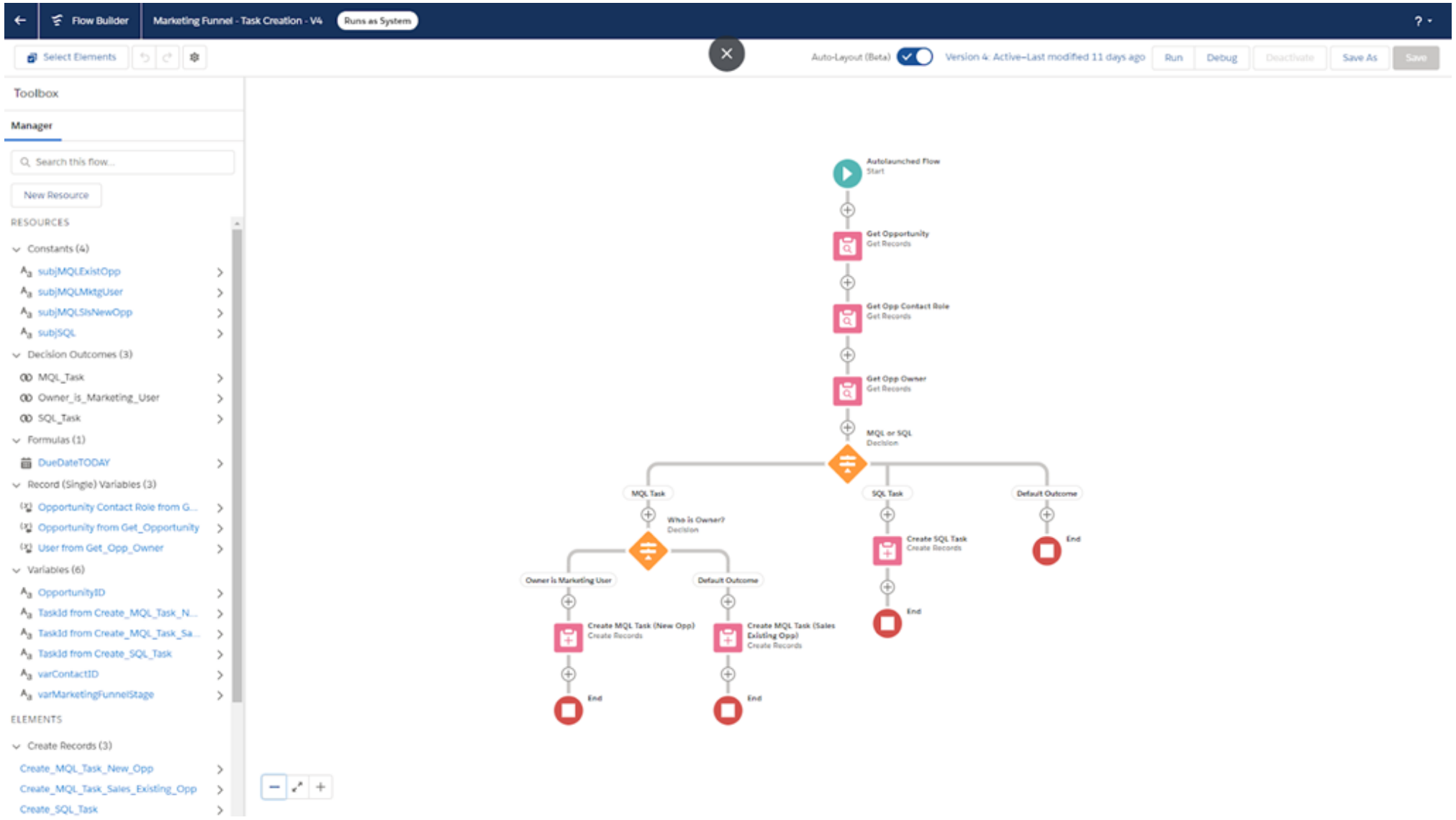
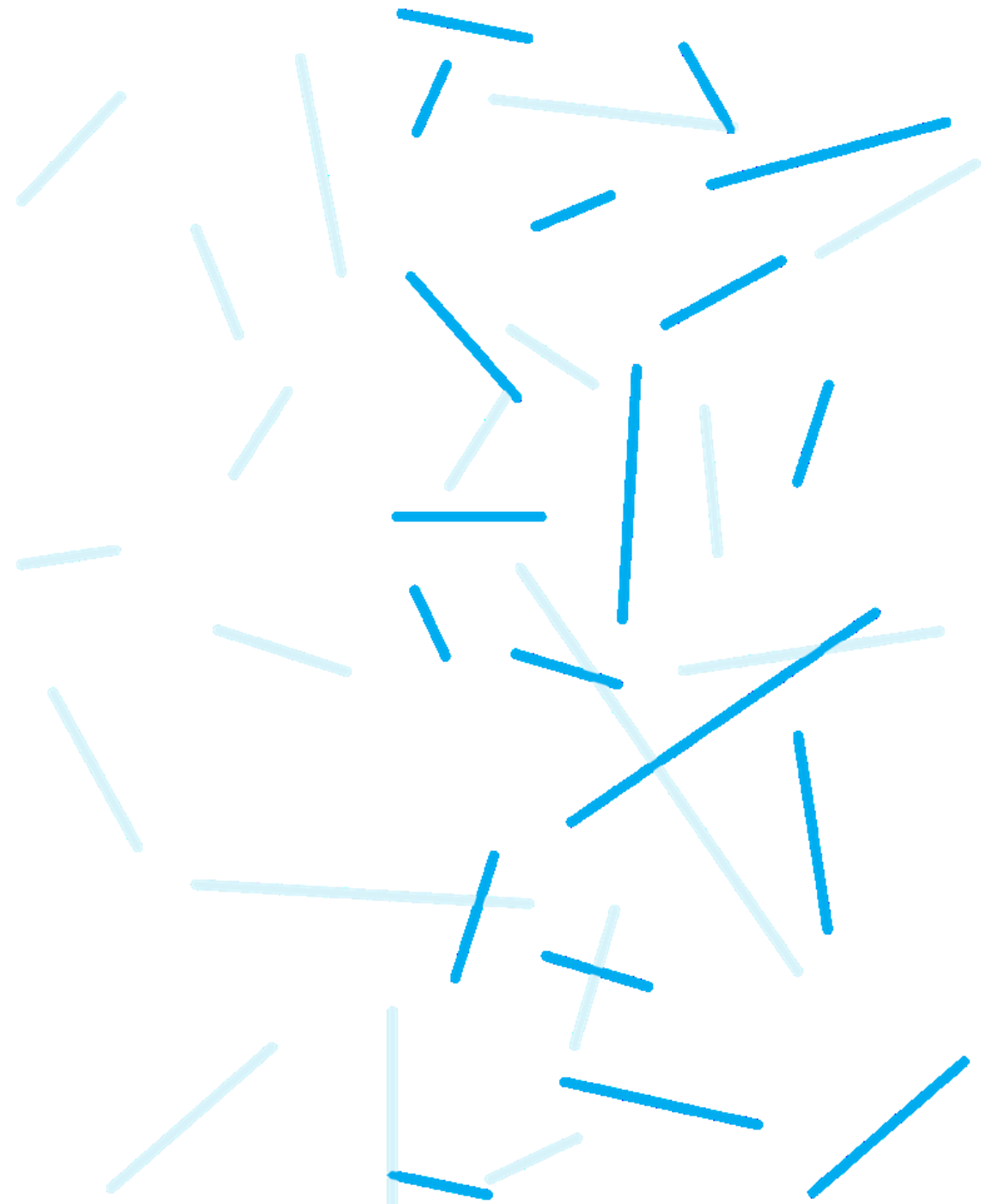

Flow Builder
Marketing Funnel - Task Creation - V4
Runs as System
Select Elements
Auto-Layout (Beta)
Version 4: Active–Last modified 11 days ago
Run
Debug
Deactivate
Save As
Save
Toolbox
Manager
Search this flow...
New Resource
RESOURCES
Constants (4)
subjMQLExistOpp
subjMQLMktgUser
subjMQLShsNewOpp
subjSQL
Decision Outcomes (3)
MQL_Task
Owner_is_Marketing_User
SQL_Task
Formulas (1)
DueDateTODAY
Record (Single) Variables (3)
Opportunity Contact Role from G...
Opportunity from Get_Opportunity
User from Get_Opp_Owner
Variables (6)
OpportunityID
TaskId from Create_MQL_Task_N...
TaskId from Create_MQL_Task_Sa...
TaskId from Create_SQL_Task
varContactID
varMarketingFunnelStage
ELEMENTS
Create Records (3)
Create_MQL_Task_New_Opp
Create_MQL_Task_Sales_Existing_Opp
Create_SQL_Task
Autolaunched Flow
Start
Get Opportunity
Get Records
Get Opp Contact Role
Get Records
Get Opp Owner
Get Records
MQL or SQL
Decision
MQL Task
Who is Owner?
Decision
Owner is Marketing User
Default Outcome
Create MQL Task (New Opp)
Create Records
Create MQL Task (Sales Existing Opp)
Create Records
End
End
SQL Task
Create SQL Task
Create Records
End
Default Outcome
End

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 dál? P