Salesforce + BPM

Automating Business Processes with
Salesforce Flow

Salesforce CRM helps automate several steps involved in the sales and service cycle. Salesforce has been continuously improving its automation tools while enabling sales teams to focus on core business objectives. A host of options such as Workflows, Process Builders, Flows, and Apex Triggers are available to automate and improve business processes.
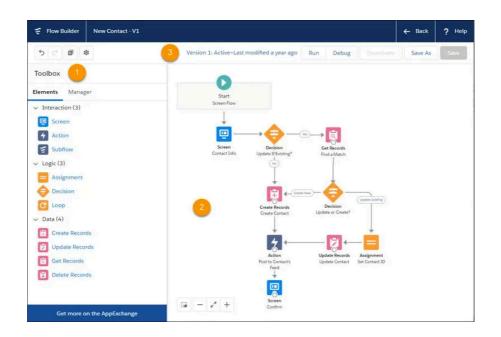
Salesforce Flow

Salesforce Flow consists of Flows and Processes. Flow Builder is a point and click tool which can be used to build flows to automate processes. There could be instances in Salesforce when users are forced to store data across multiple objects based on the design. If users are collecting information over calls, it may become tedious for them to fill in details, save the first record, and move on to the next. Flow Builder provides a screen element to collect data from a single screen and then the backend logic splits data across multiple objects. Another example for using Flow would be to automate creation of records after a service or maintenance closure or for sending survey emails to customers once their tickets or cases are closed.
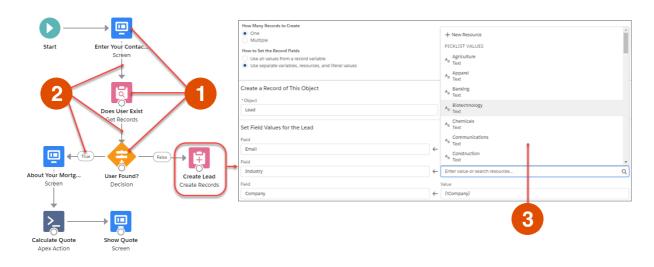
Flow Builder

Before building the flow, it is advisable to draw the details of the flow to gain a better perspective. This ensures that the building process is easier. Flows can be used to collect, change, and perform DML operations in Salesforce. Components of a flow are shown in the diagram below.

The Toolbox (1) contains elements and resources which can be dragged and dropped onto the Canvas (2) to build the flow. Button bar (3) provides information about the flow.

Screen elements can be used to collect information and have several components inbuilt. The fields with data types shown in the diagram can be mapped to Salesforce data. 'Get Records' elements fetch existing data from Salesforce, while 'Create Records' elements help in mapping the collected data to create records in Salesforce. A combination of both can be used to check if existing data can be updated instead of creating records. 'Decision Element' can branch the flow into two portions based on whether matches are found. Resources can be created as required to assign variable values to be used in the course of the flow.

As shown in the diagram, each element (1) in a flow fundamentally represents an action such as creating or updating data. Elements are linked using connectors (2) and each resource (3) represents a value or variable to be used in the flow.

Types of Flows

Basic types of flows are listed below:

- **Screen Flows**: Requires user interactions and can be launched from Lightning pages, Aura/Lightning web components, or Experience Builder pages

- **Autolaunched Flows**: These can be triggered from process Builders, Apex Classes, custom links (by setting appropriate values for necessary flow variables)

- **Scheduled Flow**: Runs at regular intervals

- **Field Service Mobile Flow**: Available on FSL mobile app

- **Autolaunched Flow with record trigger**: Runs whenever record level changes are made in Salesforce

Flow Behavior and Additional features

- Provides screen elements to users for collecting data

- Works over multiple objects and have loop elements which help to assign different sets of values to records of the same type or object

- Flow interviews can be paused and resumed at a later time

- Salesforce relies on multitenant architecture concepts – normal governor limits are applicable to flows