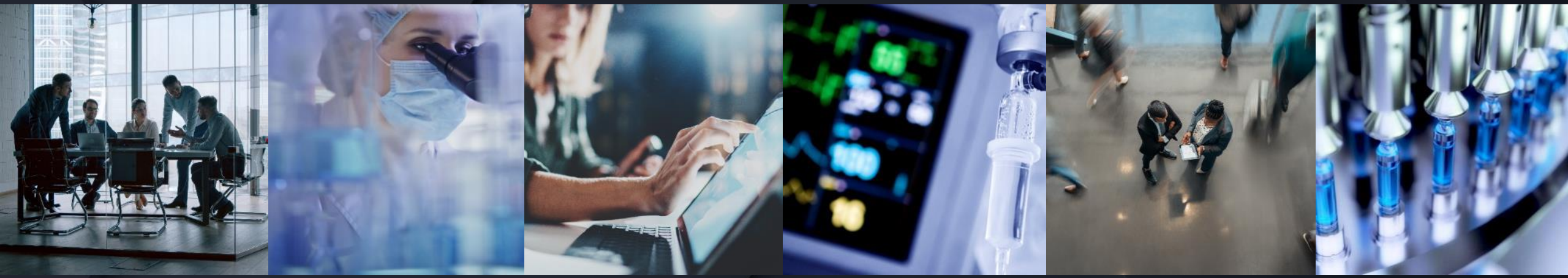
UTILIZING MIGRATE TO FLOWS TOOL PART 3: WHEN THE SALESFORCE MIGRATE TO FLOW TOOL WILL NOT WORK

LAURA WIRPSZA
CUSTOMER EXPERIENCE LEADER

JIM DAVINER
ADVANCED SOFTWARE ARCHITECT, CENTER OF EXCELLENCE

Tuesday, Oct 31, 2023



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UTILIZING THE MIGRATE TO FLOWS TOOL SERIES

JIM DAVINER
ADVANCED SOFTWARE ARCHITECT, CENTER OF EXCELLENCE

Part 1: Introduction to Salesforce Flows

October 3, 2023

- Process Builders vs Flows
- When Should You Plan This Activity?
- Demonstration
- Coming up Next

Part 2: When the Salesforce Migrate to Flow Tool Works with Modification

October 17, 2023

- What are Modifications?
- When can Flows work with Modifications?
- Demonstration
- Coming Up Next

Part 3: When the Salesforce Migrate to Flow Tool Will Not Work

October 31, 2023

- Reasons Why it Won't Work
- Creating Flows Manually
- Demonstration
- Sparta Center of Excellence Professional Service Offering

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WHEN – IS THE TRANSITION REQUIRED?

- **October '21** the transition from workflows and process builders is discussed at Dreamforce 2021.
- **Winter '22** retirement of process and workflow rules is officially announced.
- **Spring '22** introduced the Flow Trigger Explorer to help admins determine how many flows affect each object and when those records are affected (before or after save). Allows for trigger order sequencing.
- **Winter '23** a tool available for converting workflow rules to flows became available.
  - Workflow rules can no longer be created.
  - Workflow rules can still be modified and activated.
- **Spring '23** the tool could be used to move simple process builders to flows
- **Summer '23** the tool could be used for most process builders to migrate to flows.
  - Process builders can no longer be created but may still be modified and activated.
- **TODAY** The tools have been tested and used for successfully transitioning Processes to Flows
- **2025** End of Support for Process Builders [*No End-of-Life date has been provided*]

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HOW DO I MAKE THESE CHANGES?

Video:

- Reasons Why it Won't Work
- Creating & Adjusting Flows Manually

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KEY TAKE AWAYS FOR FLOWS

The Migrate to Flow tool is a native Salesforce capability now available in your Salesforce Orgs.

Salesforce Flows allow your system to:

- Create records, edit triggering record or child record
- Launch a flow, another process, apex or action.
- Send email alerts (includes scheduling)
- Trigger Order can be controlled
- Version support is available

Best Practice Recommendations:

- Be sure to plan for this activity to take place before the End of Support Date (2025)
- When Planning this activity, work in a Dev Org to make all changes before fully testing in Val and the migrating the Flow into Production
- Optimize flows after migration by splitting the flows into before and after save flows and adjusting the decision trees as needed
- To test the Flow, you need to deactivate the preceding Process Builder and Activate the Flow

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TRACKWISE DIGITAL TRAINING FOR SYSTEM ADMINS

Level 1: Understanding the Salesforce Platform

- Self-paced
- Trail: Admin Beginner
- Trail: Admin Intermediate
- Trail: Admin Advanced
- Trail: Reports & Dashboards for Lightning Experience
- Trail: Sparta TWD Training

Optional: Salesforce Administrator Certification

- Instructor-led
- Trailhead Academy: Administration Essentials for New Admins
- Trailhead Academy: Administration Essentials for Experienced Admins

Level 2: TWD Package Specific Training

- Instructor-led
- TWD Platform Management Administration
- TWD Quality Management Administration
- TWD Document Management
- TWD Training Management

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WHERE – CAN I FIND GUIDANCE?

Publicly Available Salesforce Resources

- The Ultimate Guide to Flow Best Practices

https://admin.salesforce.com/blog/2021/the-ultimate-guide-to-flow-best-practices-and-standards

- Migrate Process and Workflows to Flow

https://help.salesforce.com/s/articleView?id=000389396&type=1

- Migrate Process to Flow

https://help.salesforce.com/s/articleView?id=sf.flow_migrate_to_flow.htm&type=5

- Migrate Process to Flow Considerations

https://help.salesforce.com/s/articleView?id=sf.migrate_to_flow_tool_considerations.htm&type=5

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CENTER OF EXCELLENCE OFFERINGS



ARCHITECTURE

Salesforce and Platform functionality



DOCUMENTATION

Configuration changes
Data model workflows
Process diagrams



CUSTOMIZATION

Custom objects
Integrations
Code review



RISK PLANNING

Indicators of health
Deployment and upgrade ability

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BUILDING FLOWS TIPS & TRICKS

- Specialized Training Course can be available to your team on Building advanced flows.
- This could include:
  - Adding Loops
  - Advanced Logic
  - Subflows
  - Actions
  - Platform Event Subscriptions (Using TWD PESM)
  - Fault Paths and Messaging
  - Flow Trigger Order Best Practices
  - Screen Flow Best Practices

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THANK YOU.

TELL US WHAT YOU THINK

SEE YOU IN 2024!

Please send questions to DL-HCSScustomersuccess@HoneywellProd.onmicrosoft.com

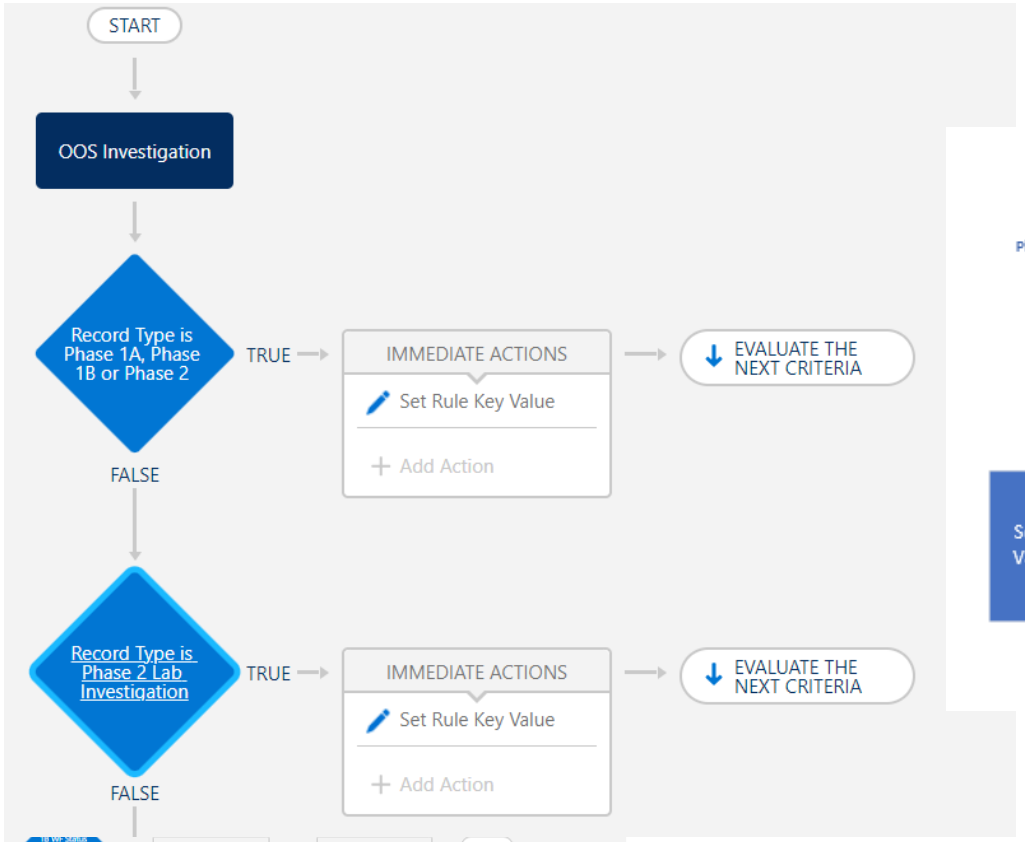
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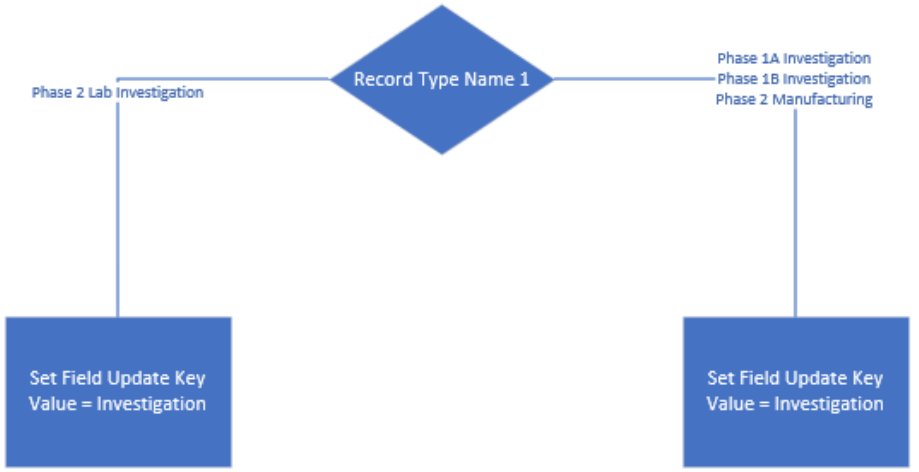
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APPENDIX:

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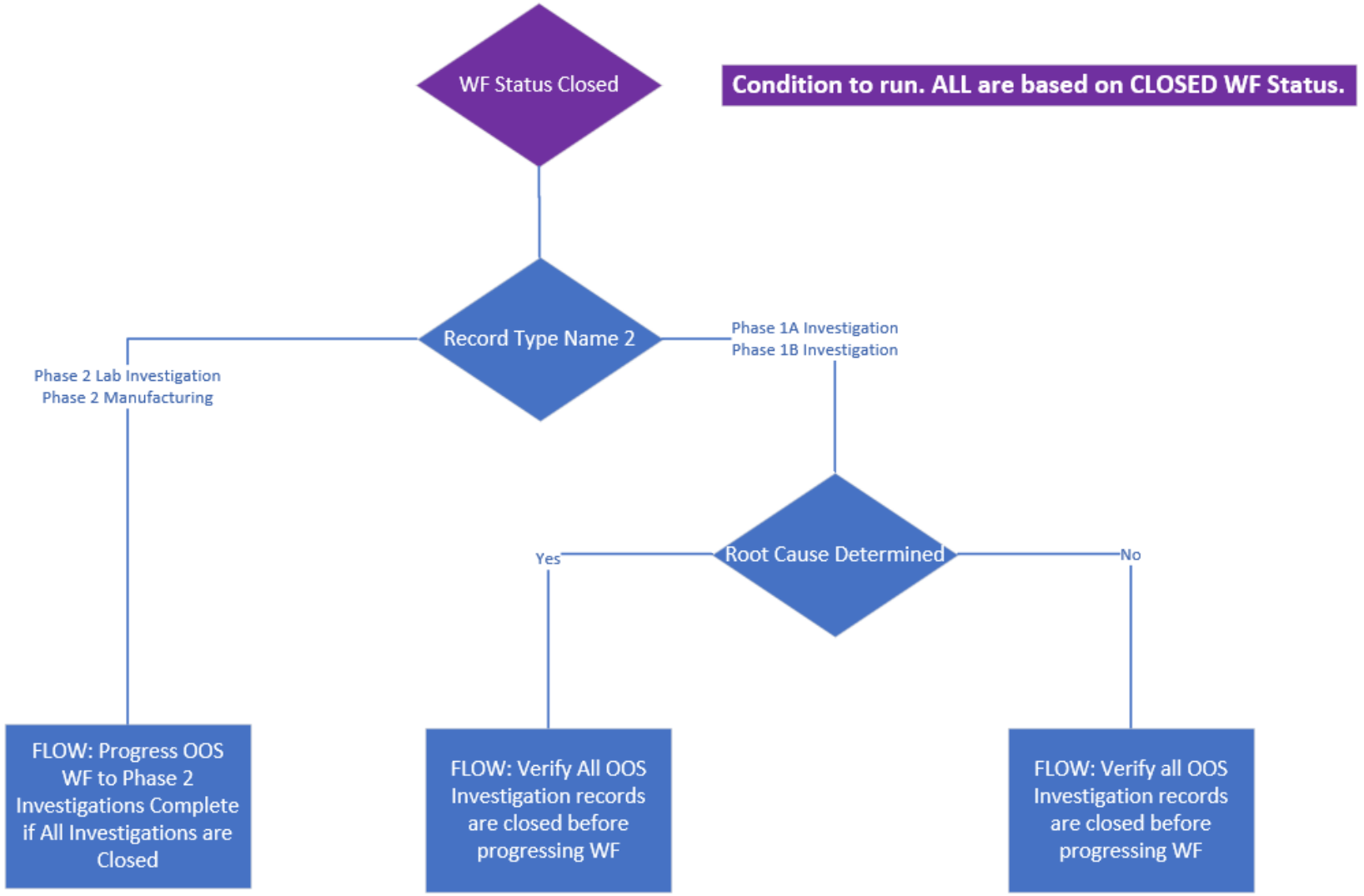




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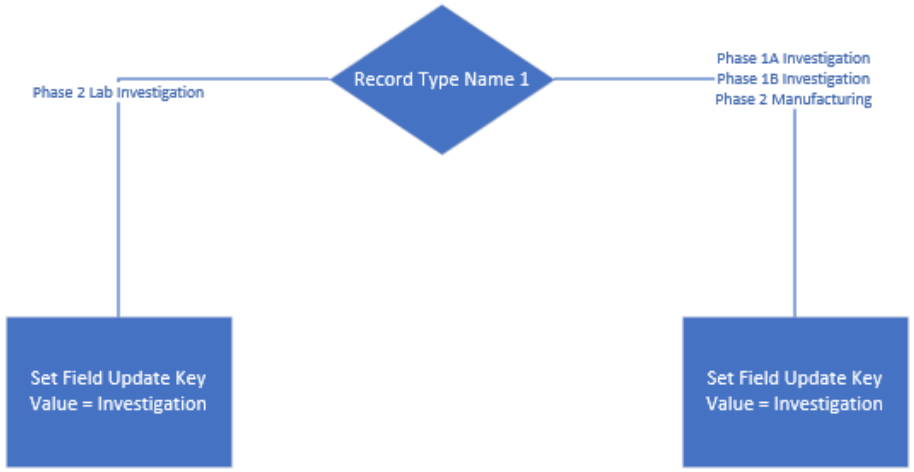
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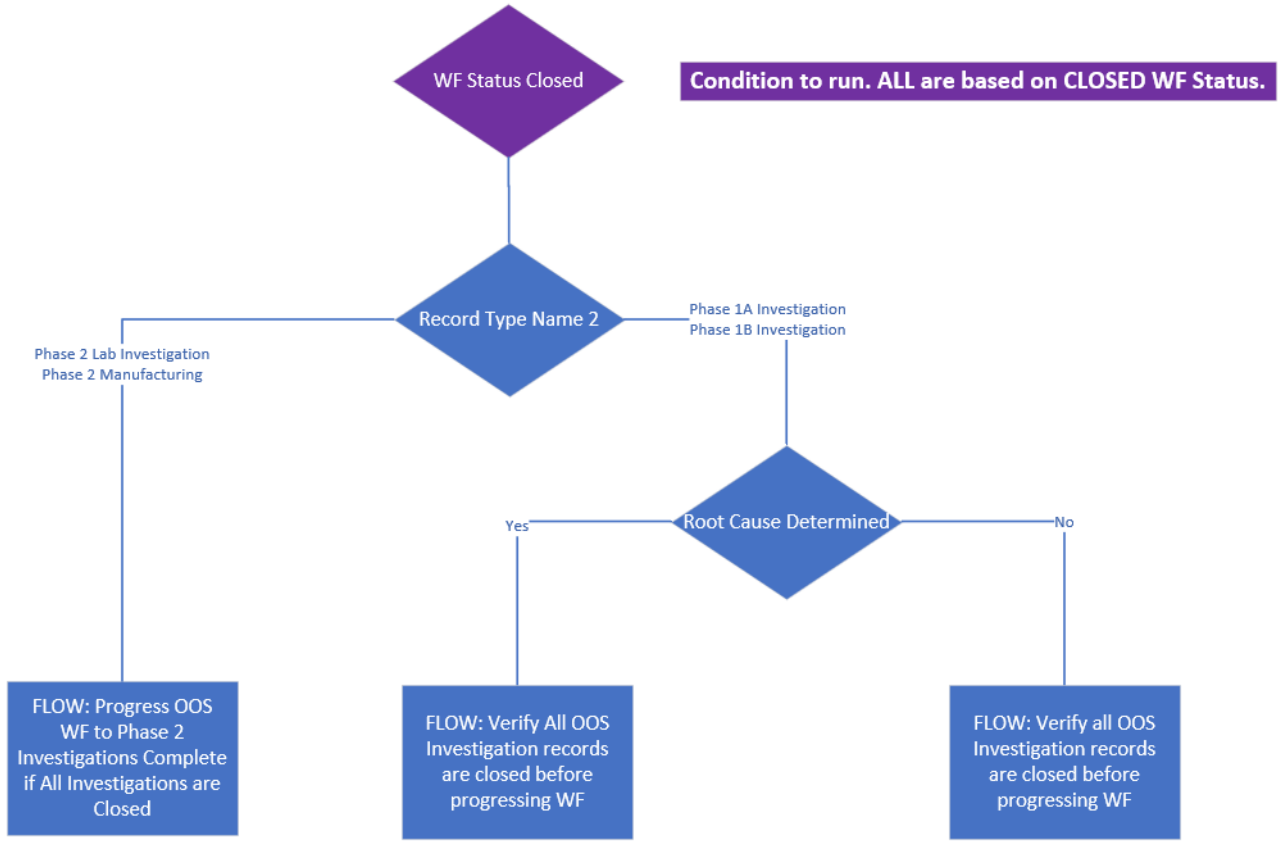




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