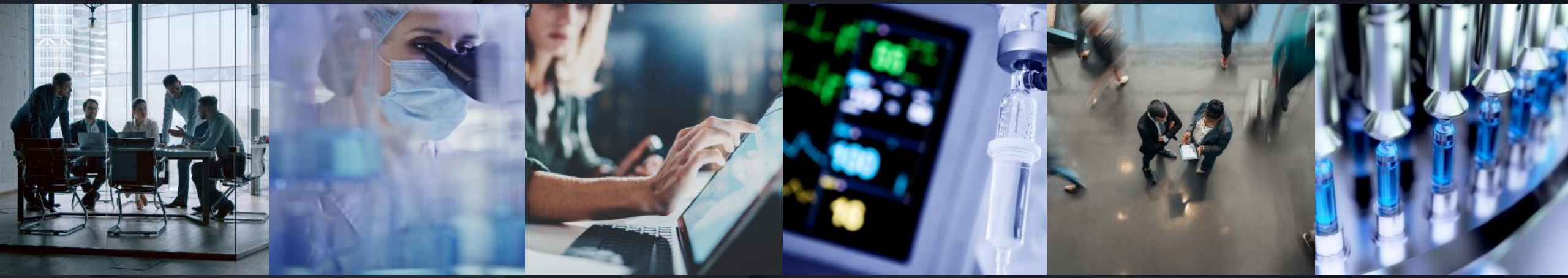
UTILIZING MIGRATE TO FLOWS TOOL PART 2: WHEN THE SALESFORCE MIGRATE TO FLOW TOOL WORKS WITH MODIFICATION

LAURA WIRPSZA
CUSTOMER EXPERIENCE LEADER

JIM DAVINER
ADVANCED SOFTWARE ARCHITECT, CENTER OF EXCELLENCE

Tuesday, Oct 17, 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?
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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

Register Here for Part 3

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WHEN – IS THE TRANSITION REQUIRED?

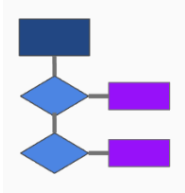
- **October ‘21** the transition from workflows and process builders is discussed at Dreamforce 2021.
- **Winter ‘22** retirement of process and workflow rules is officially announced.
- **Spring ‘22** introduced the Flow Trigger Explorer to help admins determine how many flows affect each object and 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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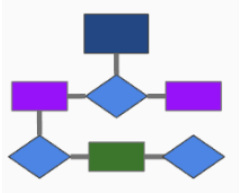
WHAT – IS THE DIFFERENCE?

Process Builder



- Series of IF statements (simple logic)
- Create records, edit triggering record or child record
- Launch a flow, another process, apex or action.
- Send email alerts (includes scheduling)
- Respects limited order of operations at base level
- Version support

Flow



- Supports CASE statements (complex logic)
- Create, Edit Update ***any*** record
- Launch sub flows, apex or actions
- Sends email alerts (includes scheduling)
- Support for before or after save updates
- Can edit or update unrelated records.
- Version support
- Supports user input (screen flow)

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HOW DO I MAKE THESE CHANGES?

Video: **Adjusting the Migrate Options to Optimize a 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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THANK YOU.

TELL US WHAT YOU THINK



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

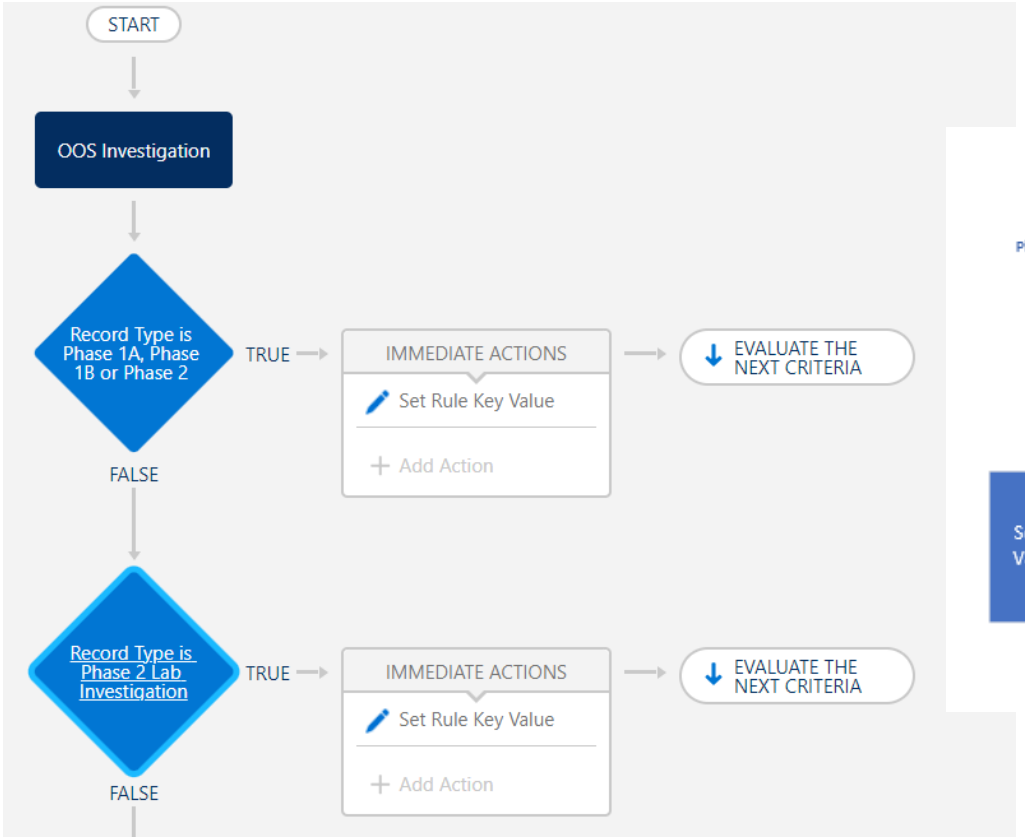
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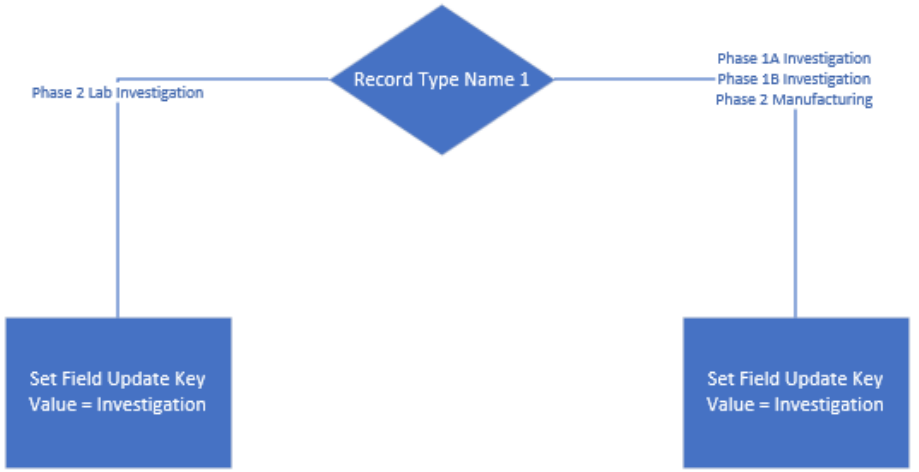
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APPENDIX: CHECKING LOGIC. SHOULD WE OPTIMIZE?

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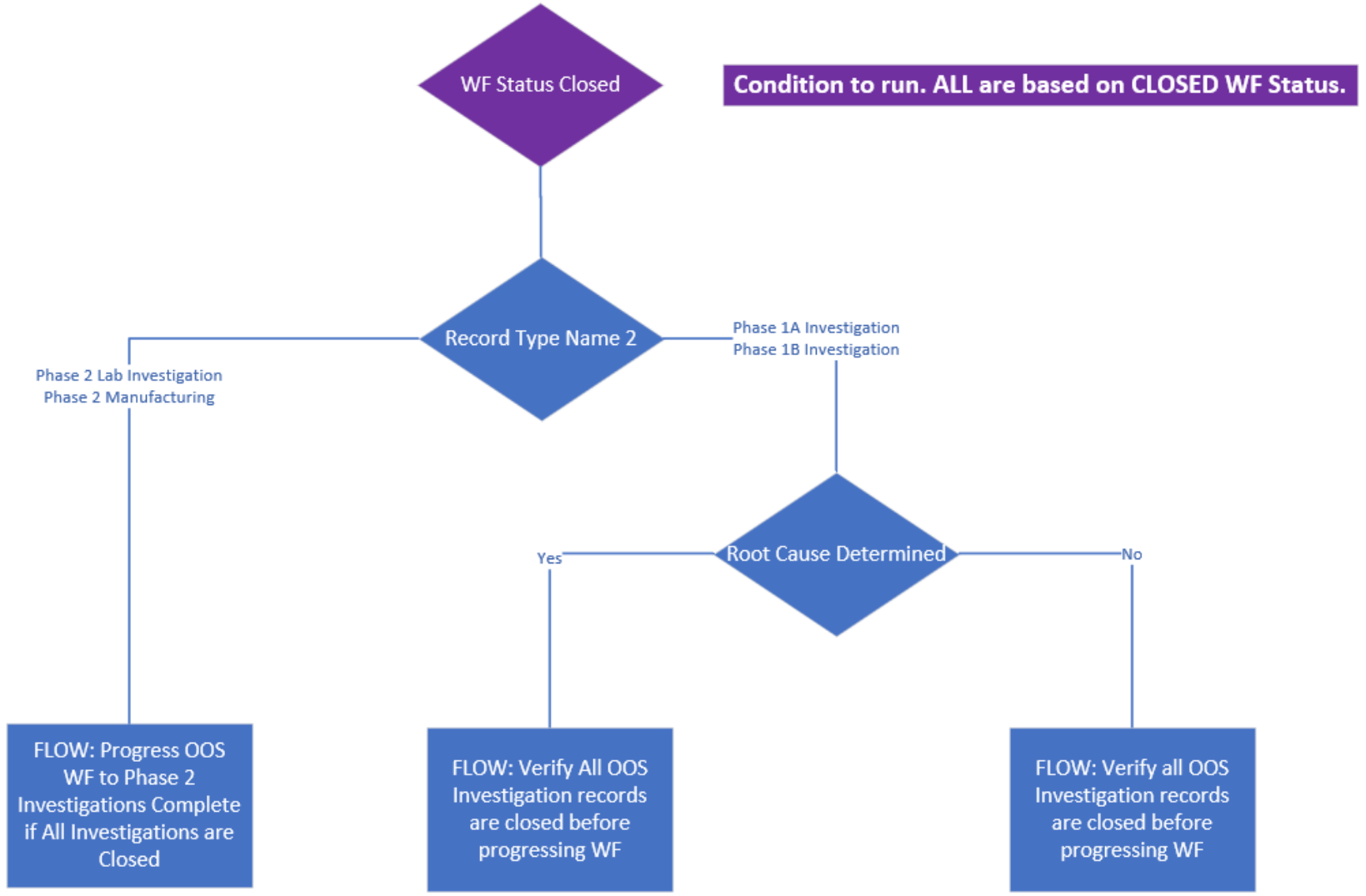




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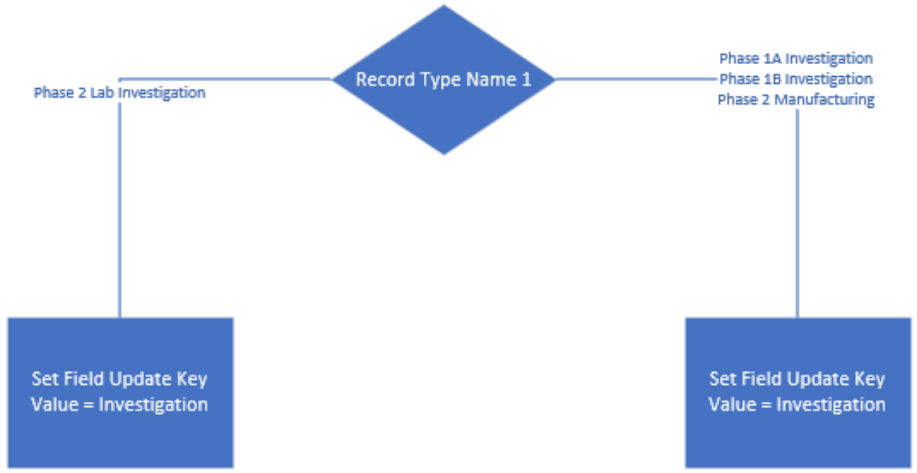
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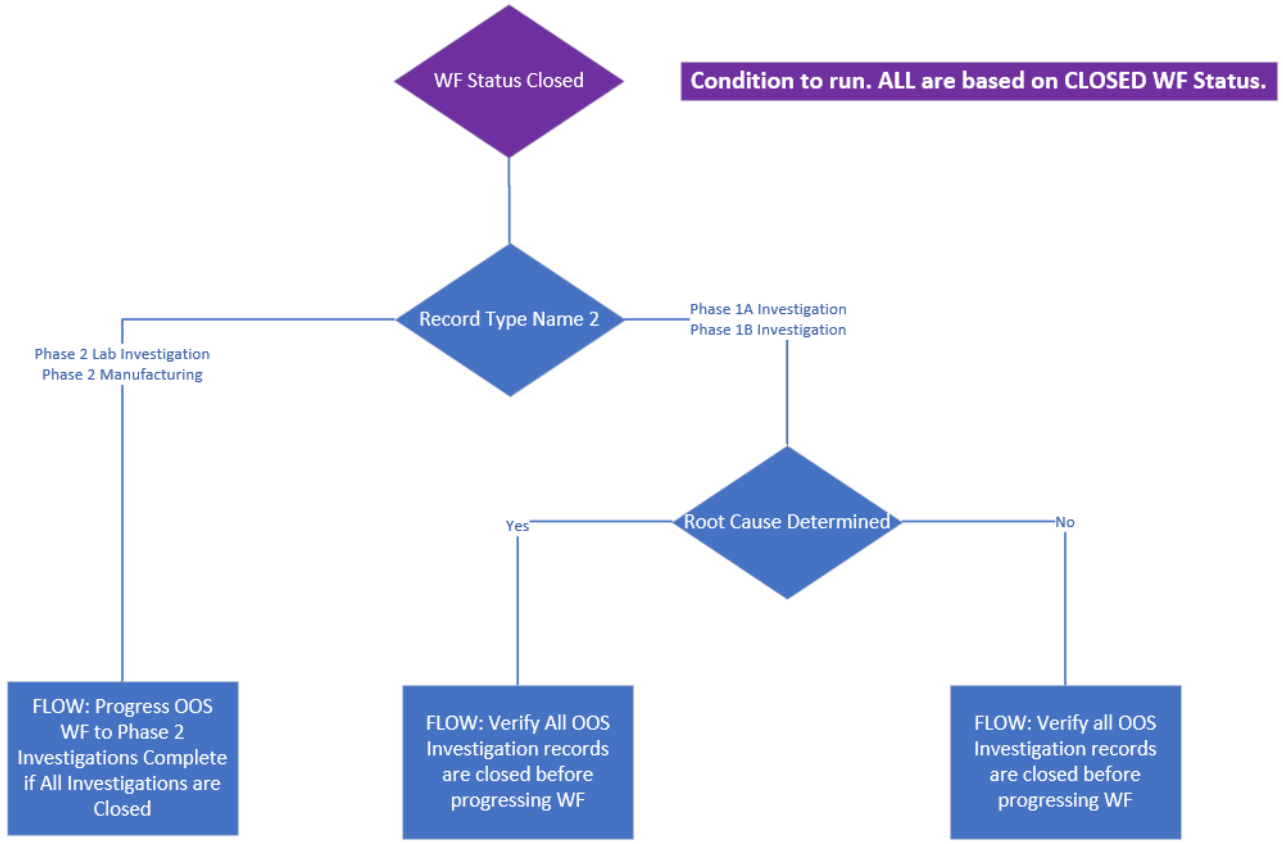




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