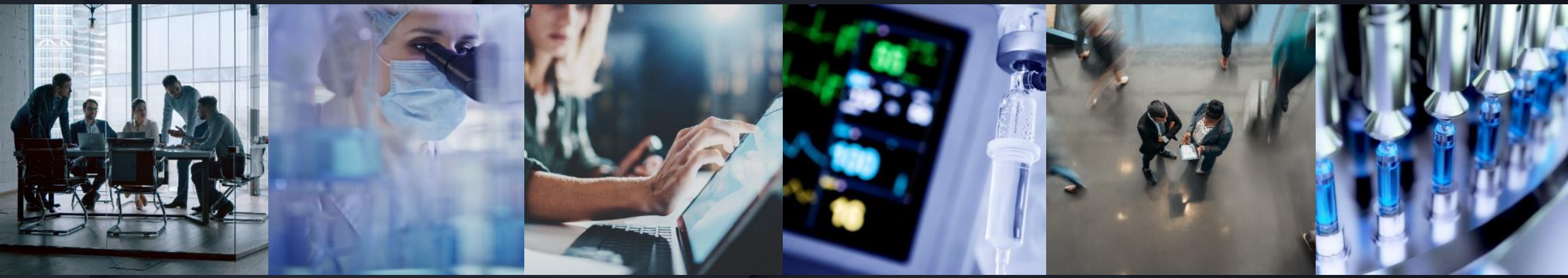
UTILIZING MIGRATE TO FLOWS TOOL PART 1: INTRODUCTION TO SALESFORCE FLOWS

LAURA WIRPSZA
CUSTOMER EXPERIENCE LEADER

JIM DAVINER
ADVANCED SOFTWARE ARCHITECT, CENTER OF EXCELLENCE

Tuesday, October 3, 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

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- Reasons Why it Won't Work
- Creating Flows Manually
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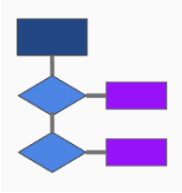
Register Here for Part 2 & Part 3

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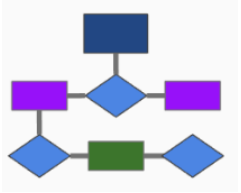
WHAT – IS THE DIFFERENCE?

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

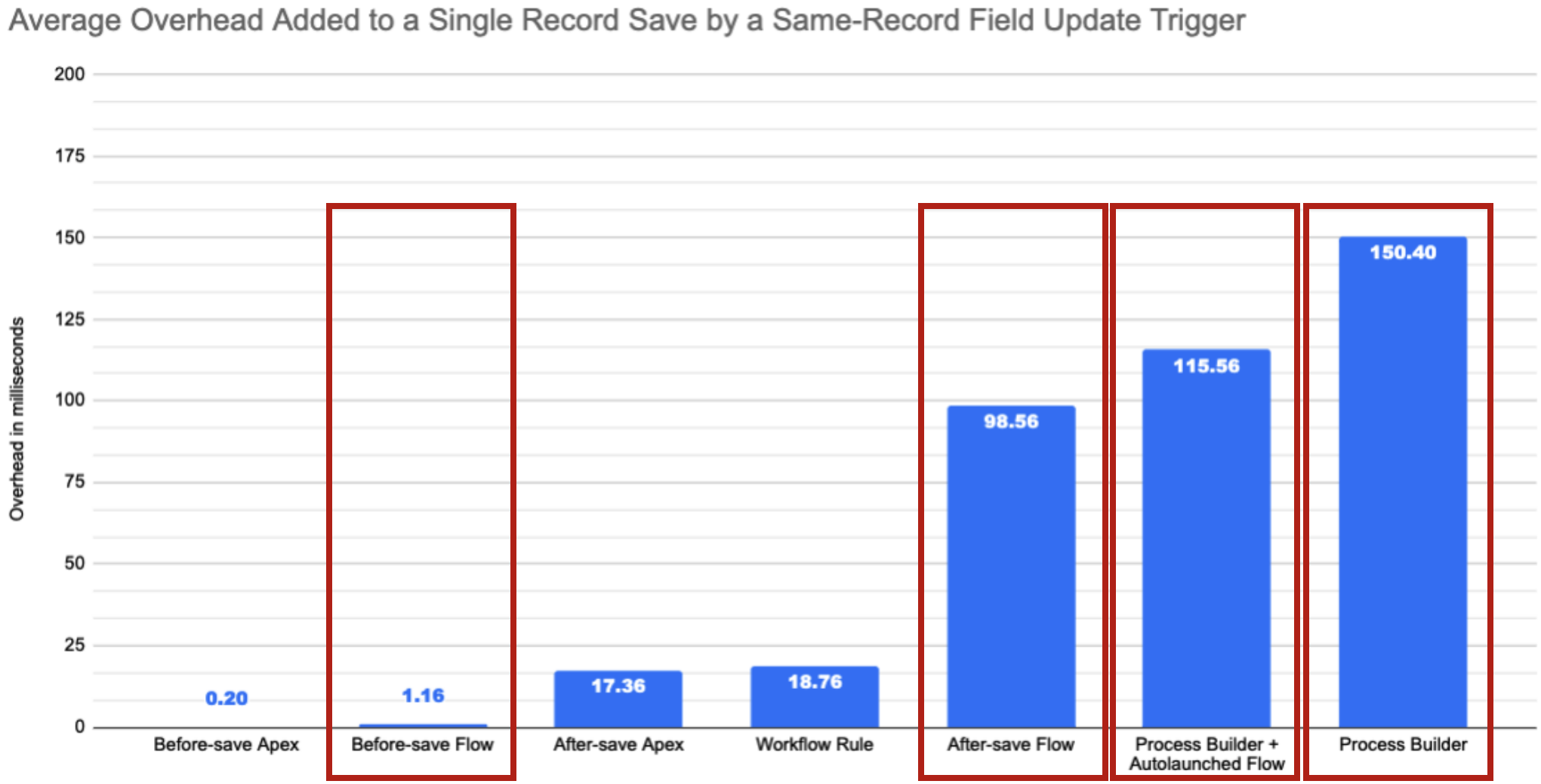
Flow



- 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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WHAT – IS THE DIFFERENCE?



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WHO – NEEDS TO BE INVOLVED?

Your SOP for Change

- Business Owners need to know what is happening.
- Technical Team needs to prepare for the change.
- Validation Team needs to understand what is happening.
- Operations should be aware of the adjustment

BUSINESS OWNERS

TECHNICAL TEAMS

VALIDATION TEAM

OPERATIONS & DOCUMENTATION

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WHY – DO YOU NEED TO TRANSITION?

Enforced Requirement from Salesforce.com

- End of Support
  - Salesforce will discontinue support for workflow rules and process builders in 2025.
    - Time to make the transition is decreasing day by day.
    - Future-proof your organization
    - Time to learn the ins and outs of Flow
- End of Life
  - There is currently no EOL timeframe.
  - At the end of the EOL period, workflow rules and process builders will stop functioning.

- It's a brand-new world!
  - Salesforce wants a single source of declarative automation and wants to build this into the architecture of all new products.
  - Salesforce wants to increase the skills of administrators to use non-code solutions and best practices to accommodate change.

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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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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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HOW DO I MAKE THESE CHANGES?

Getting Started

- Flow Environment Walkthrough
- Migrate Process to Flow Tool

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THANK YOU.

SEE YOU NEXT TIME

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

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