



THE CUSTOMER SUCCESS PLATFORM

# Fun With Flows!

---

Automation Above the UI

Terry Cole

Missionary & Founder, Street Youth Ministry of Austin

Email: [terry@StreetYouthMinistry.org](mailto:terry@StreetYouthMinistry.org)

Twitter: [@streetyouth](https://twitter.com/streetyouth)

# Safe Harbor

Safe harbor statement under the Private Securities Litigation Reform Act of 1995:

This presentation may contain forward-looking statements that involve risks, uncertainties, and assumptions. If any such uncertainties materialize or if any of the assumptions proves incorrect, the results of salesforce.com, inc. could differ materially from the results expressed or implied by the forward-looking statements we make. All statements other than statements of historical fact could be deemed forward-looking, including any projections of product or service availability, subscriber growth, earnings, revenues, or other financial items and any statements regarding strategies or plans of management for future operations, statements of belief, any statements concerning new, planned, or upgraded services or technology developments and customer contracts or use of our services.

The risks and uncertainties referred to above include – but are not limited to – risks associated with developing and delivering new functionality for our service, new products and services, our new business model, our past operating losses, possible fluctuations in our operating results and rate of growth, interruptions or delays in our Web hosting, breach of our security measures, the outcome of any litigation, risks associated with completed and any possible mergers and acquisitions, the immature market in which we operate, our relatively limited operating history, our ability to expand, retain, and motivate our employees and manage our growth, new releases of our service and successful customer deployment, our limited history reselling non-salesforce.com products, and utilization and selling to larger enterprise customers. Further information on potential factors that could affect the financial results of salesforce.com, inc. is included in our annual report on Form 10-K for the most recent fiscal year and in our quarterly report on Form 10-Q for the most recent fiscal quarter. These documents and others containing important disclosures are available on the SEC Filings section of the Investor Information section of our Web site.

Any unreleased services or features referenced in this or other presentations, press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make the purchase decisions based upon features that are currently available. Salesforce.com, inc. assumes no obligation and does not intend to update these forward-looking statements.

# To Know, Love and Serve Street-dependent Young People

Terry Cole, Missionary and Founder



Street Youth Ministry of Austin

Since

**2008**



# To Know, Love and Serve Street-dependent Young People

Terry Cole, Missionary and Founder



Street Youth Ministry of Austin



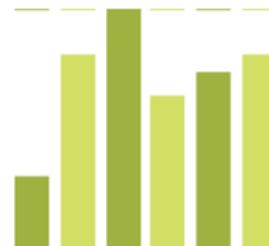
Homeless Young Adults:

**100/week**



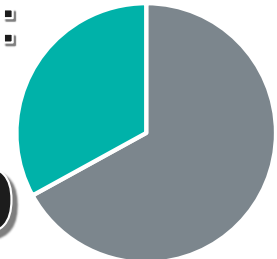
Avg. Age:

**24**



Women:

**33%**



# To Know, Love and Serve Street-dependent Young People

Terry Cole, Missionary and Founder



## Street Youth Ministry of Austin

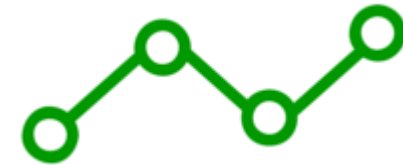
### Relief

- Food
- Clothing
- Self-care Help

### Renewed Hope

- Small Steps
- Flexibility
- Believe in yourself

## Achievements:



# 60/month



# What Is Above the User Interface (UI)?

A demonstration from my own system: Capturing a client event

**Capture Volunteer Event**

Next

Event **All Manual Entries**

Date **3/26/2015** [ 8/26/2015 ]

Note: Restart to re-enter this information

Next

Recorded with  
**SCREENCASTOMATIC**

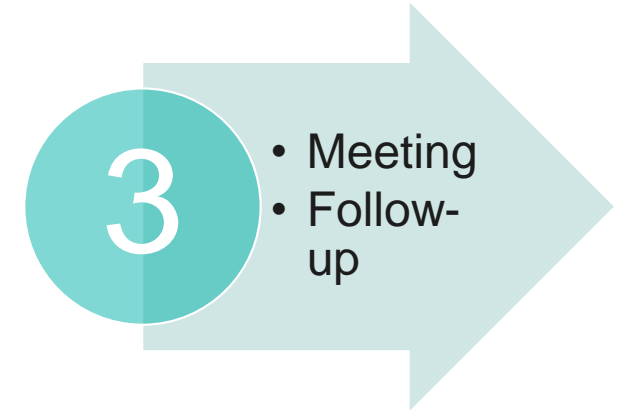
# Opportunity -- Simpler Example

Salesman coming back from a meeting with customers from two companies...



Customer Meeting Over:

3 people to record activities for.



Easy! Right?

# Opportunity -- Simpler Example

Salesman coming back from a meeting with customers from two companies...

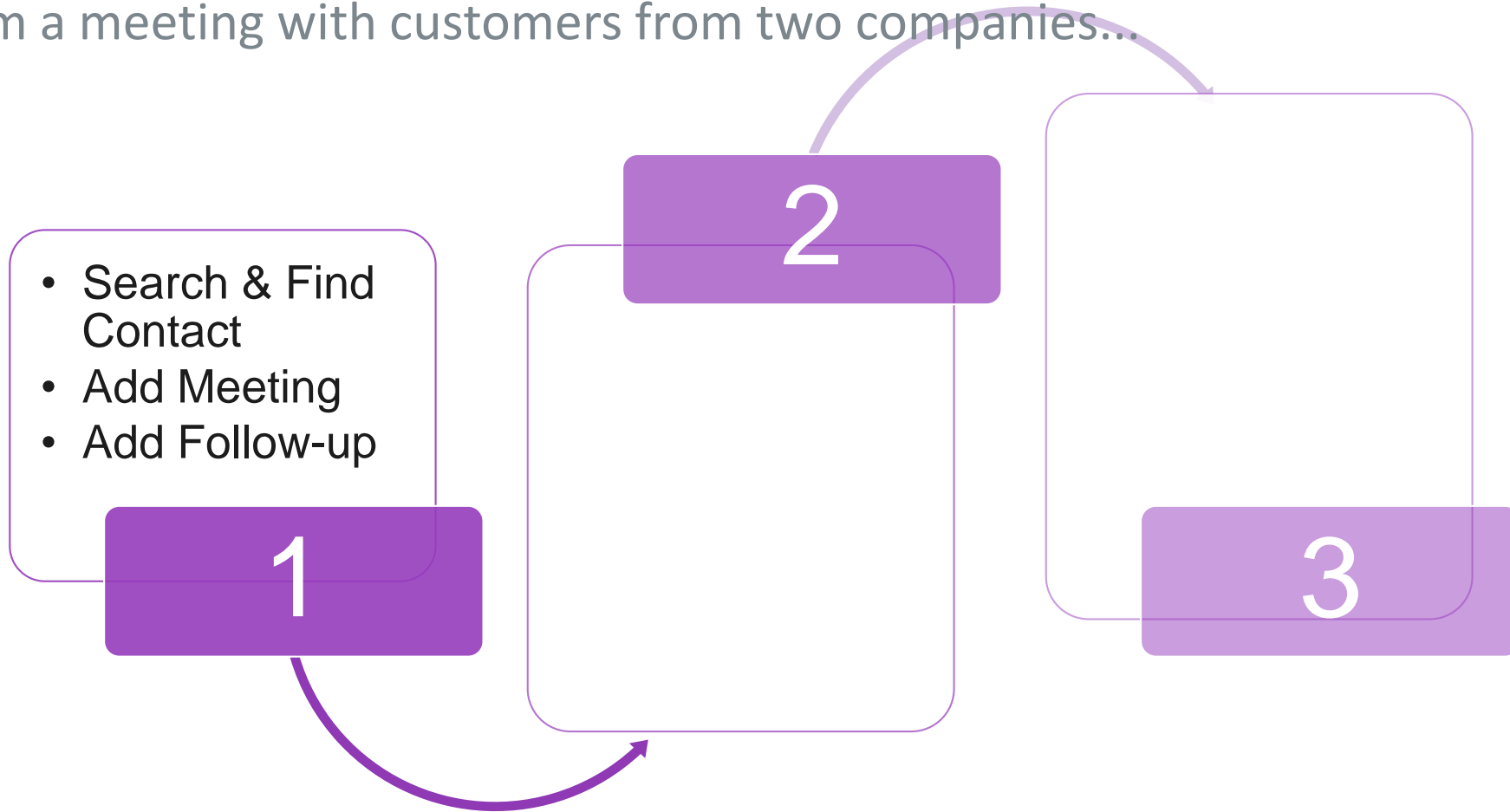


## Decisions:

Who's new?

New contact info?

New account info?



- Search & Find Contact
- Add Meeting
- Add Follow-up

What one WAS easy!



# Opportunity -- Simpler Example

Salesman coming back from a meeting with customers from two companies...

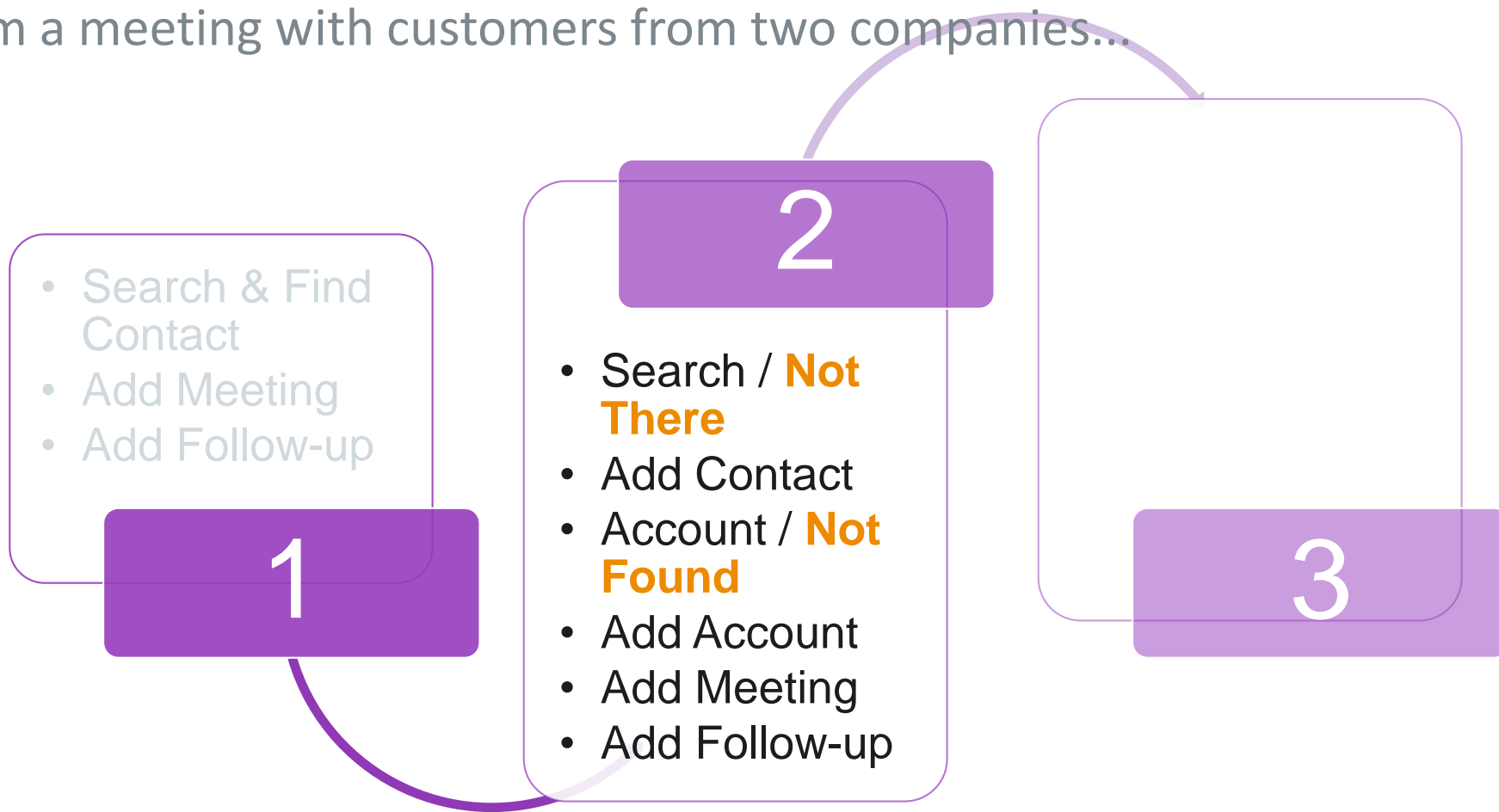


## Decisions:

Who's new?

New contact info?

New account info?



Not so easy. Multiple Screens.

Did you forget to  
Add the follow-up?

# Opportunity -- Simpler Example

Salesman coming back from a meeting with customers from two companies...



## Decisions:

Who's new?

New contact info?

New account info?

- Search & Find Contact
- Add Meeting
- Add Follow-up

1

- Search / Not There
- Add Contact
- Account Not Found
- Add Account
- Add Meeting
- Add Follow-up

2

- Search & Find
- **Edit** Contact Info
- **Edit** Account Info
- Add Meeting
- Add Follow-up

3

## Actual User Experience:

**Distracted. Disjoint. Easy to Skip Steps**

# Capture Meeting Flow

Three Big Ideas to Take Away: 3 novel flow design patterns

## #1 Display Handles

Bring your database to life in Flow

Edit Selected Account

Select Account

Create New

Street Youth Ministry (Austin, TX [StreetYouthMinistry.org](http://StreetYouthMinistry.org))

# Capture Meeting Flow

Three Big Ideas to Take Away: 3 novel flow design patterns

## #1 Display Handles

Bring your database to life in Flow

## #2 Upsert Subflows

Add new or edit existing data in the context of your flow.

Account Name	Street Youth Ministry
City	Austin
State	TX
Web	StreetYouthMinistry.org

# Capture Meeting Flow

Three Big Ideas to Take Away: 3 novel flow design patterns

## #1 Display Handles

Bring your database to life in Flow

## #2 Upsert Subflows

Add new or edit existing data in the context of your flow.

## #3 Escape Mechanism

Complete the solution without adding everything.

Additional Info

New phone number is 512 555 1212.

# Design Pattern #1: "Display Handle"

Search Before Create; No duplicates!

**Key fields for Object:**

Account Name	Street Youth Ministry
City	Austin
State	TX
Web	StreetYouthMinistry.org

# Design Pattern #1: "Display Handle"

Search Before Create; No duplicates!

Key fields for Object:

Account Name	Street Youth Ministry
City	Austin
State	TX
Web	StreetYouthMinistry.org

New "Display Handle" Formula Field:

Account Location Web (Text) =

```
Name &  
" (" & BillingCity & ", " & BillingState & " " &  
Website & ") "
```

# Design Pattern #1: "Display Handle"

How to use Flow without duplicates!

## Flow User Screens:

Account Search Mask



Edit Selected Account

Select Account

- Create New
- Street Youth Ministry (Austin, TX [StreetYouthMinistry.org](http://StreetYouthMinistry.org))

## Flow Elements:

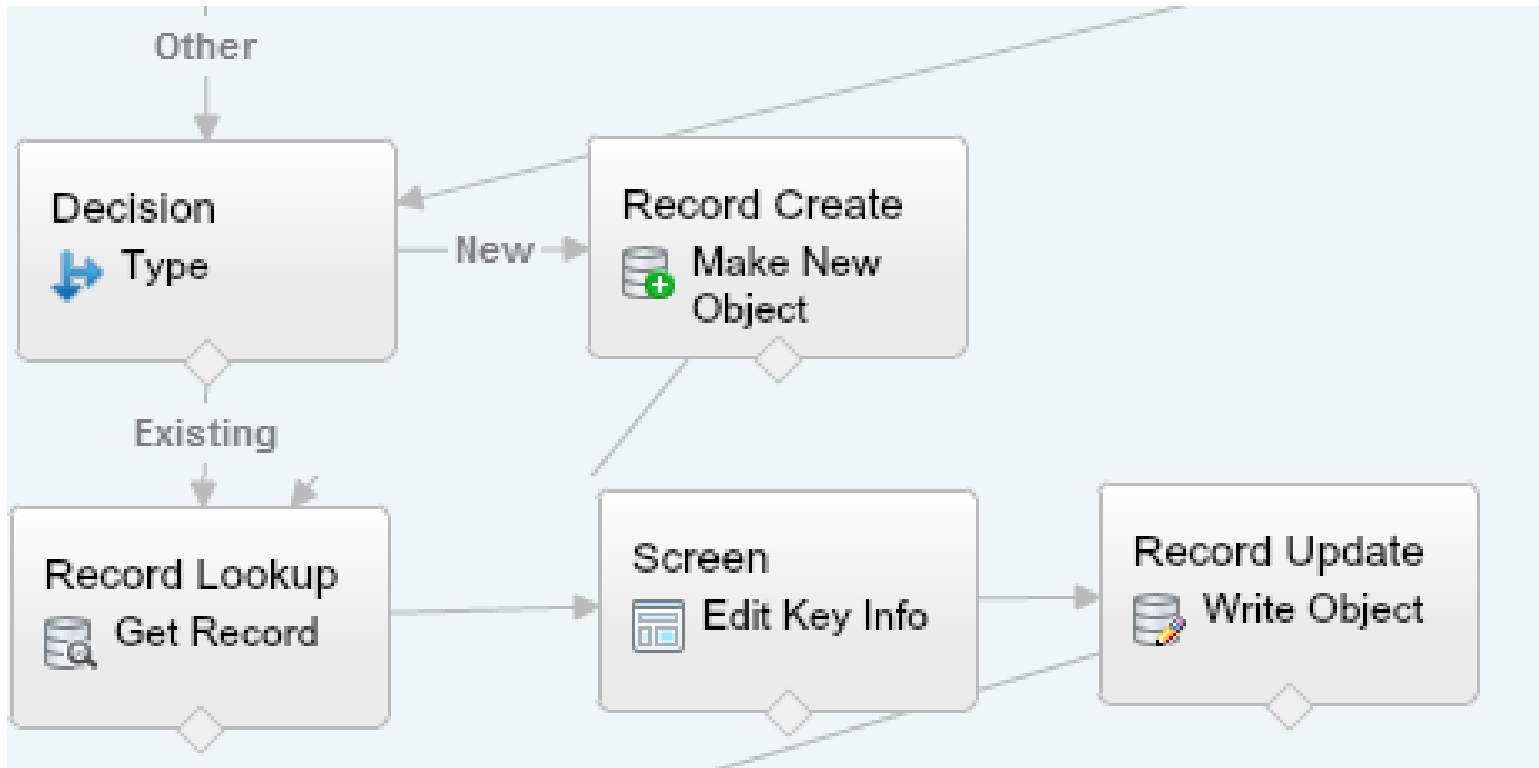


Use Dynamic Choice Variable:  
Handle contains search mask



# Design Pattern #2: Upsert Object

This design pattern to make things reusable and easy!



## Upsert Subflow Core:

If ID=NEW, Create

Else Retrieve by ID

Display Key info for Edit

Save



Always Return ID

# Design Pattern #3: "Escape Mechanism"

A design pattern to allow you to grow over time! And help users be distraction free!

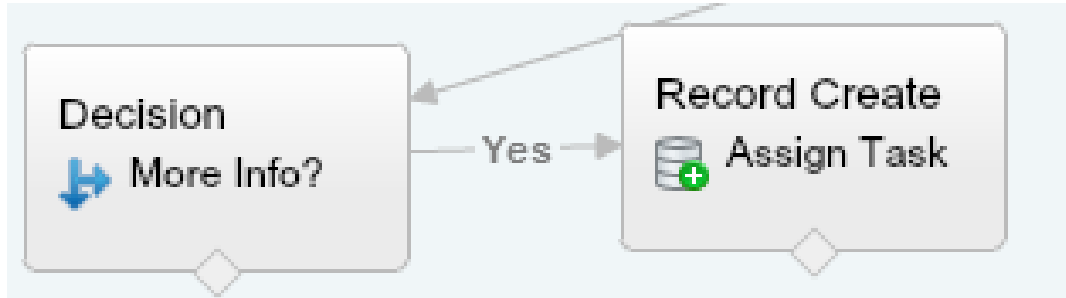
**More than Key Fields?**

**Link an open task with additional info!**


Account Name	ABC Machining 
City	Belton
State	TX
Web	www.ABCMatching.com
Additional Info	<div data-bbox="563 762 1888 1168"><p>New phone number is 512 555 1212.</p></div> 


# Design Pattern #3: "Escape Mechanism"

A design pattern to allow you to grow over time! And help users be distraction free!



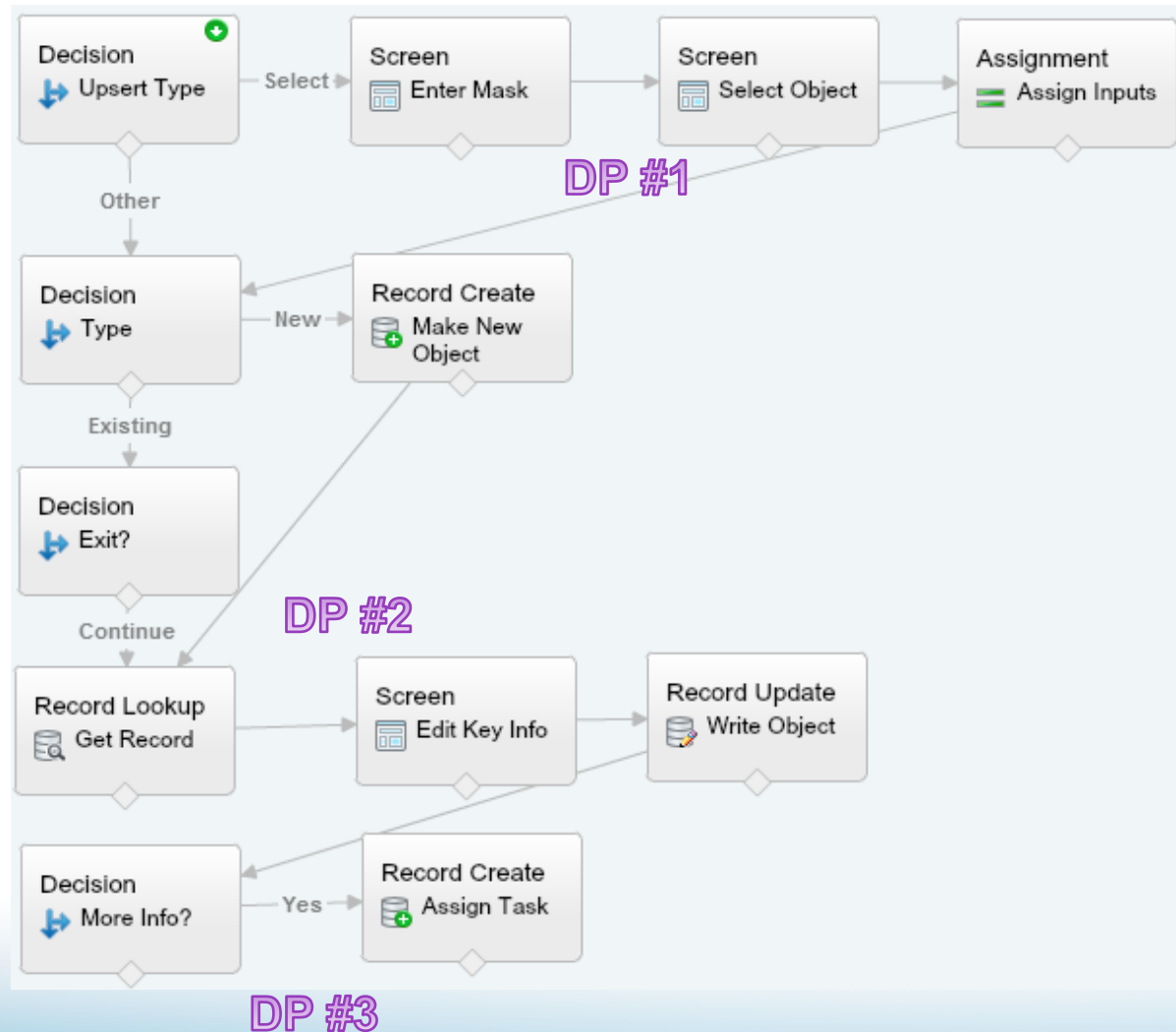
**More than Key Fields?**  
**Link an open task with additional info!**



Assigned To	 Terry Cole	Status	Not Started
Subject	Add Additional Account to ABC Machining	Name	
Due Date	8/23/2015	Related To	<a href="#">ABC Machining</a>
Phone		Email	
Priority	Normal		
Created By	<a href="#">Terry Cole</a> , 8/22/2015 3:55 PM	Last Modified By	<a href="#">Terry Cole</a> , 8/22/2015 3:55 PM
Comments	You entered additional information for ABC Machining. Please go to the associated object and capture the following information:  Phone is 512 555 1212		

# Putting it All Together

Very simple and extremely powerful Sub-Flow: Upsert Account



## Input:

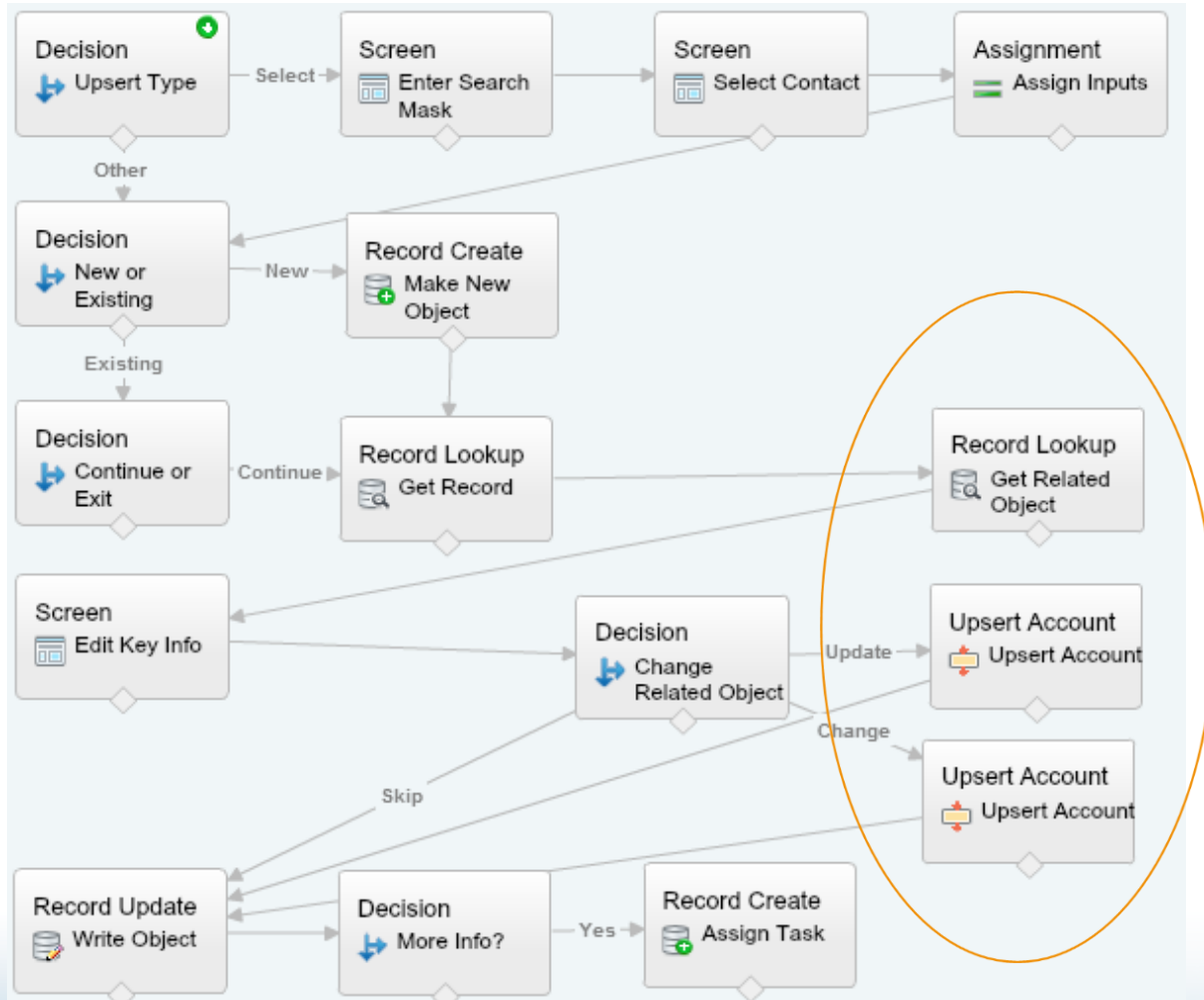
ID = NEW, SELECT  
or actual Salesforce ID

## Output:

ID of new, selected, or  
edited object--no matter  
which happened!

# Putting it All Together

Repeat for an Even More Powerful Sub-Flow: Upsert Contact!



Same Inputs and Outputs

Reused Design Pattern

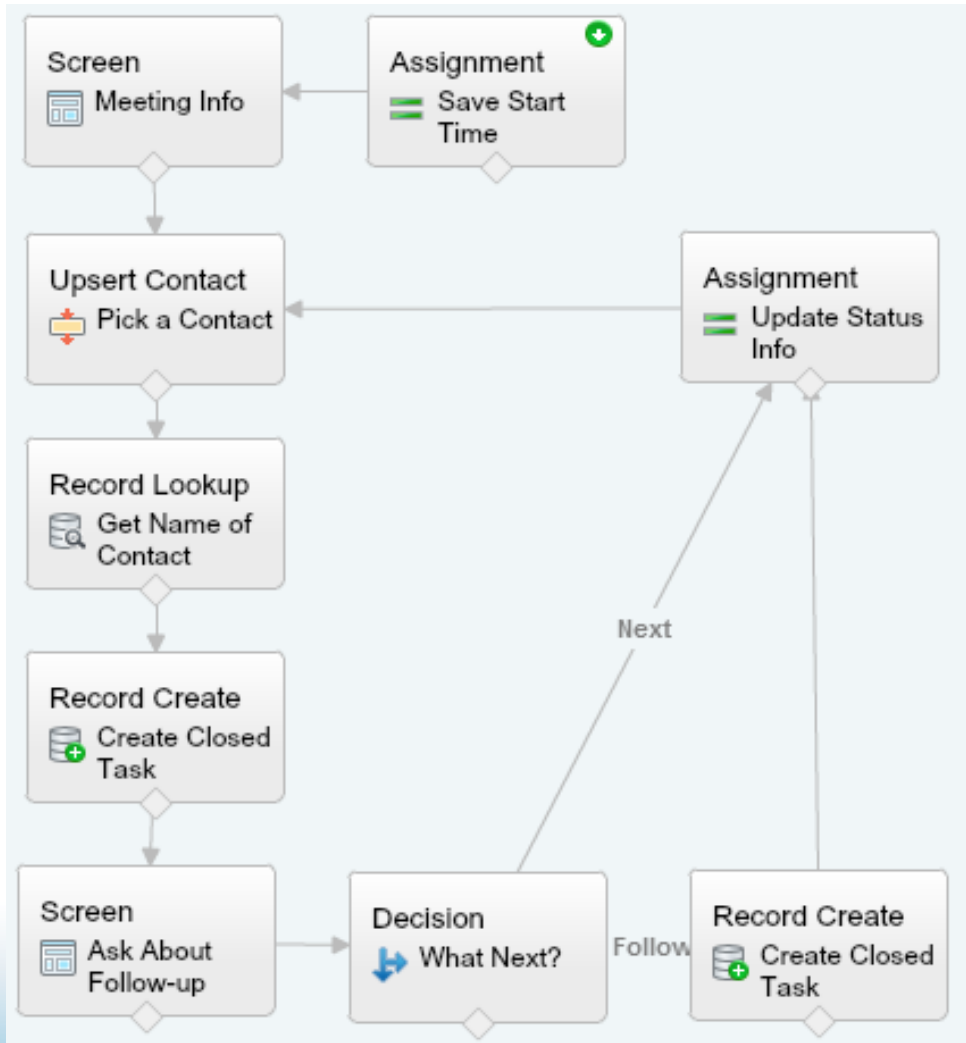
BUT:

**Allows changing or editing related Account using Upsert Account!**

**Output is ID of contact object no matter what happens!**

# Putting it All Together

Very simple and extremely powerful Flow: Capture Meeting



## How to run Flows:

- Run Flow from setup
- or
- Shortcut link on home menu
- or
- Add to Visual Force page and then add to SF1 App Menu

# Revisiting the Examples Meeting

Now it actually is 1, 2, 3!

**Capture Meeting**

Next

Meeting Date  [8/30/2015]

Meeting Title

Next

Powered with  
**SCREENCASTOMATIC**

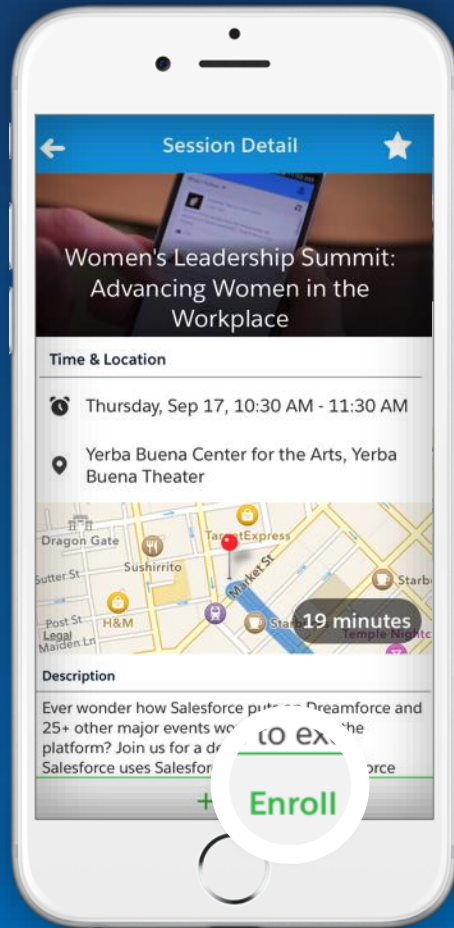
# Resources

Entire Example Is Available as Unmanaged Package:

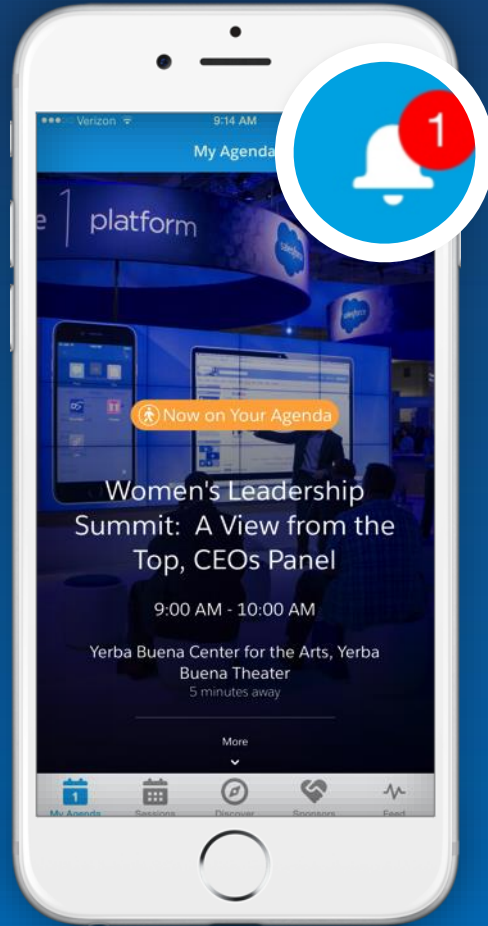
<https://login.salesforce.com/packaging/installPackage.apexp?p0=04ti0000000xB7j>



# Share Your Feedback and Win a GoPro



1 Enroll in a session



2 Tap the bell to take a survey



3 Earn a GoPro prize entry for each completed survey

# Resources

Entire Example Is Available as Unmanaged Package:

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04ti0000000xB7j>

**Q&A**

**Thank YOU**

The Salesforce logo, which is a blue cloud shape with the word "salesforce" written inside in white lowercase letters.

salesforce

Thank you