Flow Automation
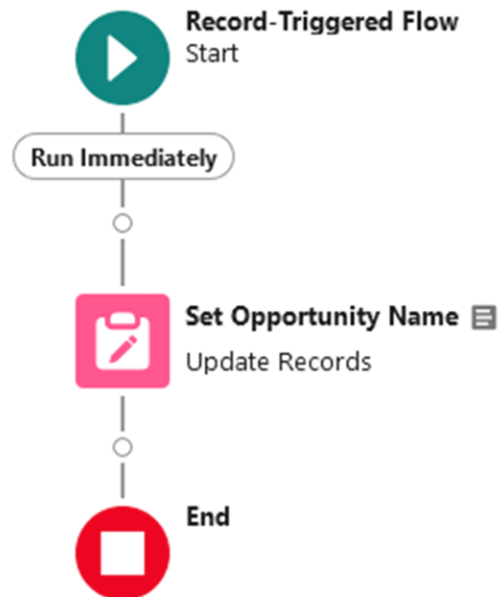
Todd J. Knoblock

Flow Automation Submission Items:

- Flow Challenge 1 (Task 1)
- Flow Challenge 1 (Task 2)
- Flow Challenge 1 (Task 3)
- Flow Challenge 2 (Task 1)
- Flow Challenge 3 (Task 1&2)
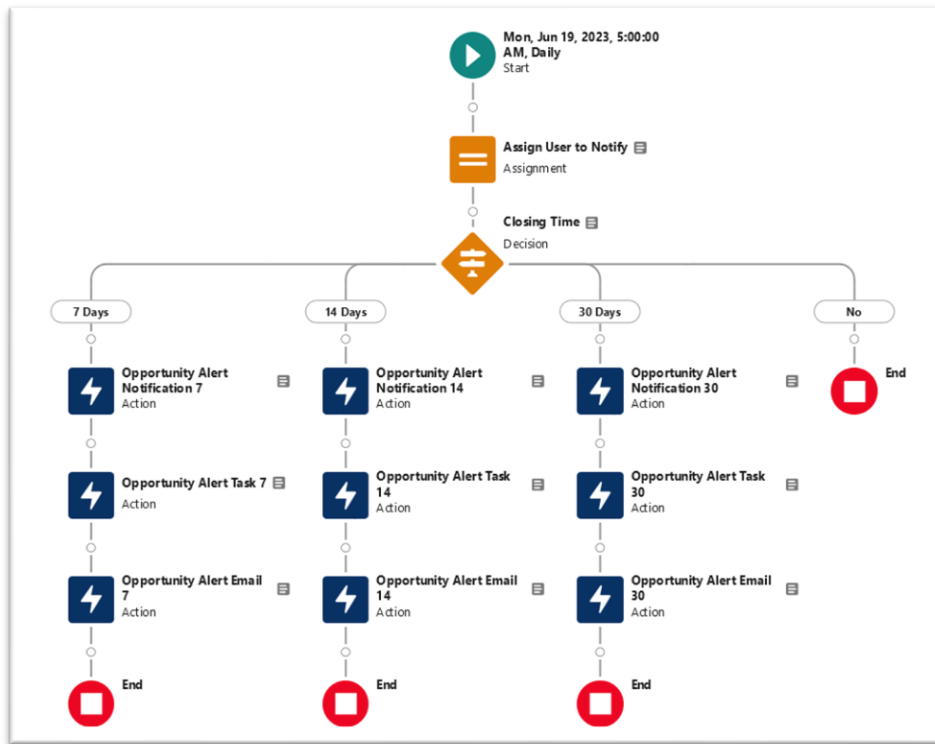- Flow Challenge 4 (Task 3)

Flow Challenge 1 (Task 1)

Business Use Case

▶ Sales Reps / Support team requires standardized naming convention for Opportunity Records

Setup

▶ Opportunity Custom Fields created:

  ▶ Account Owner (Formula):

    ▶ Account.Owner.FirstName & " " & Account.Owner.LastName

  ▶ Capture Date (Date)

  ▶ Lead Name (Lookup(Contact)

  ▶ LeadName (Formula):

    ▶ Lead_Name__r.FirstName & " " & Lead_Name__r.LastName

Flow Challenge 1 (Task 2)
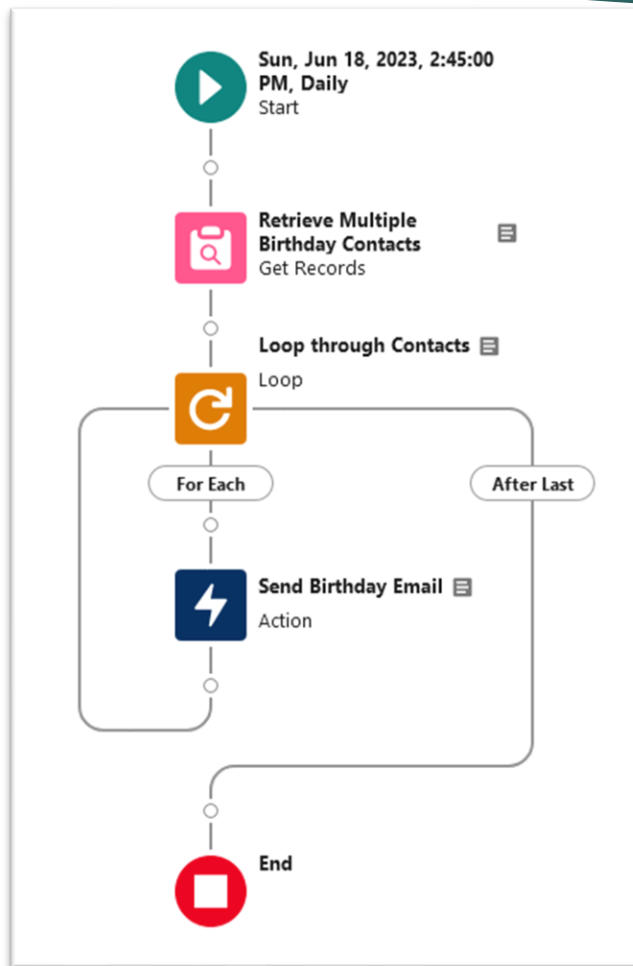

Business Use Case

- Sales Reps / Support team needs to be alerted about specific opportunities

Setup

- Collection Variables:
  - varUserId
    - "Add"
    - $Record > Owner ID
  - varUsersEmail
    - "Add"
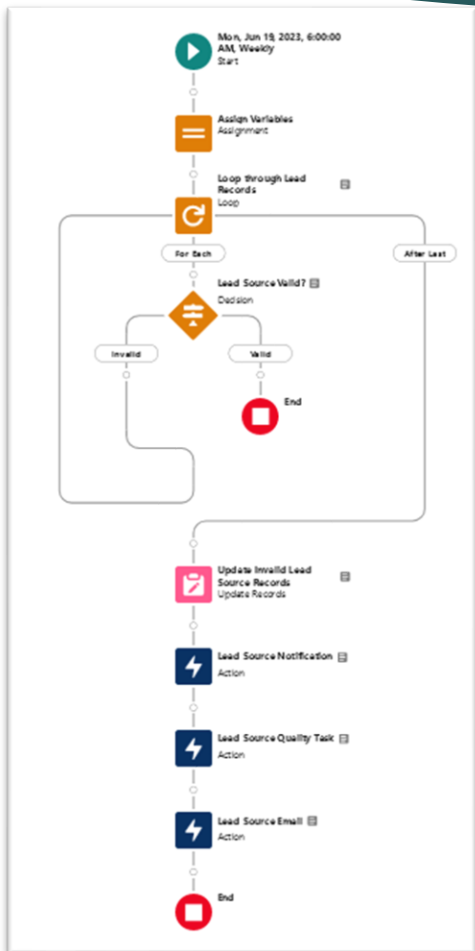   - $Record > Owner ID > Email

Flow Challenge 1 (Task 3)

Business Use Case

▶ Company wants to send Happy Birthday Greeting Cards to Customers to celebrate their special day!

Setup

▶ Contact Custom Fields created:

- ▶ Birthday Day (Formula):
  - ▶ TEXT(DAY(Birthdate))
- ▶ Birthday Month (Formula):
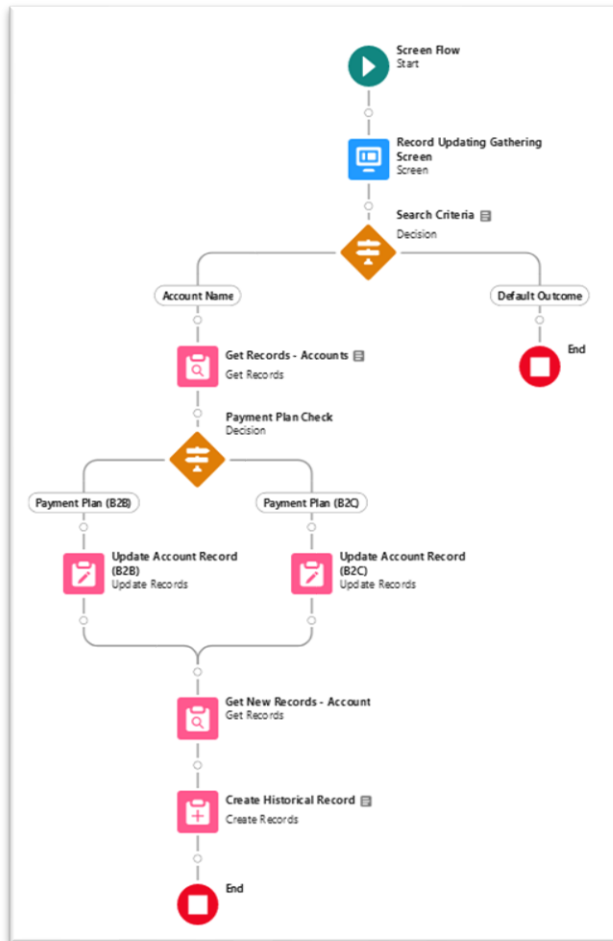 - ▶ TEXT(MONTH(Birthdate))

Flow Challenge 2 (Task 1)

Business Use Case

▶ Establish consistent Lead tracking across multiple lead sources to prevent data mix-ups and accurately attribute leads to their respective accounts.
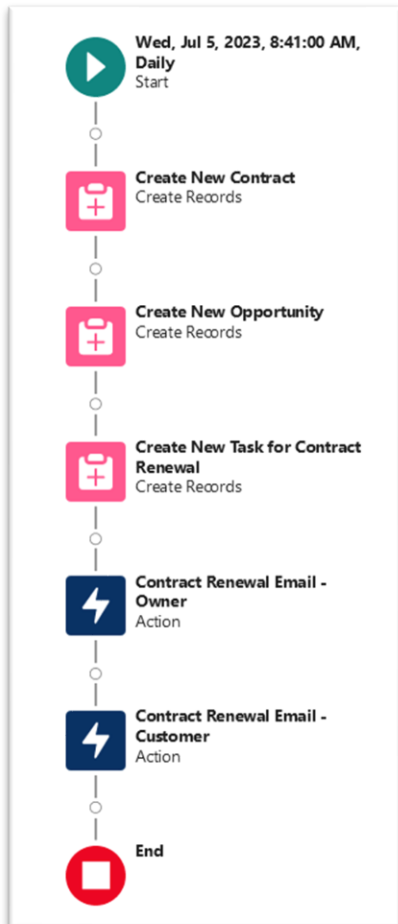
Flow Challenge 3 (Task 1&2)

Business Use Case

► Implement an automated process that seamlessly transitions B2C clients to the B2B channel, ensuring a smooth integration at the account level while preserving pertinent account information.

► Capture and retain contact information of clients transitioning to the B2B side, allowing for ongoing tracking and communication before transferring them to a new representative.

Flow Challenge 4 (Task 3)

Wed, Jul 5, 2023, 8:41:00 AM, Daily
Start

Create New Contract
Create Records

Create New Opportunity
Create Records

Create New Task for Contract Renewal
Create Records

Contract Renewal Email - Owner
Action

Contract Renewal Email - Customer
Action

End

Business Use Case

► Develop a streamlined system that provides visibility into B2B contract renewals, enabling proactive identification of contracts nearing expiration by 90 days, thus enhancing the renewal process and minimizing complications.