

Make Screen Flows More User-Friendly with UnofficialSF Resources

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About PCFMA

- Founded in 1988
- Headquartered in Concord, California; San Francisco Bay Area
- 501c5 (agricultural) Nonprofit organization
- Operates certified farmers' markets in 6 Bay Area counties

How we Use Salesforce

- Track farmers and other vendors who sell in our farmers' markets
- Track contracts and documents for regulatory compliance
- Assign vendors to farmers' markets
- Maintain customer contact lists for each farmers' market
- Track marketing contacts through multiple channels
- Accept applications from potential new employees

Why Flows

- Simplify and speed up repetitive tasks
- Prevent data integrity errors
- Improved user functionality for complex processes on the mobile app

Flow Sources

- AppExchange
- UnofficialSF

Use Case

- Digitizing California's "Certified Producer Certificate"
- The Certificate is recorded in the custom "Producer Document" object
- List of produce items a farm has been verified as growing
- Produce items are recorded in the customer "Farmers Market Product" child object
- Certificates are renewed annually and subject to change as farmers change what products they choose to grow
- PCFMA needed a way to clone an existing certificates and quickly make updates to add or remove produce items

Iterative Flow

- The Loop function built into Flows allows action to be taken on a large number of records; in this case those are produce items
- The Loop function is most efficient when making the same change to every record introduced to the Loop
- In our use case, a keep or delete decision would need be made concerning each produce item so the Loop would display each produce item record, one at a time
- An alternative was a Checkbox Group fed by a Dynamic Record Choice but this was unwieldy for long lists

Flow with Extension

- To make the Flow more efficient, replaced the Loop with the “Dual List Box Flow Screen Component” from UnofficialSF
- Component utilizes a familiar technique of moving items from one box to another, similar to multi-select picklists
- Allows all produce items to be displayed at once in a list; items to be deleted can be moved from the box on the left to the box on the right
- All data scrolls within the boxes making it easier to have instructions and user guidance visible at all times
- Data can be easily queued for review before action is taken

A Peak Under the Hood

My Top 5 List of UnofficialSF Flow Extensions

Screen Components

1. Dual List Box FSC
2. DatatableV2

Action Components

1. Sort Collection
2. Commit Transaction
3. Convert CSV to String
4. Unlock Records

Action Component Example: Preventing Flow Limit Errors

- Commit Transaction

Long term Challenge

- Understanding how to properly leverage all of the functions in UnofficialSF components can be a challenge
- Some components from UnofficialSF require manual updating to take advantage of new features
- Salesforce is continually updating Flow, including creating standard components that replicate some UnofficialSF resources; if a Flow project is not time-sensitive, waiting may be a good strategy

Q&A

Resources

- Learning Flows
- Blogs
- Flow solutions
- UnofficialSF

Thank you for coming



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