YOUR GUIDE TO SAGE PEOPLE FLOWS

Part One

Tugela PEOPLE

Introduction

Flows technology is Process Builders and Workflows all wrapped up in one. Since the switch off by Salesforce of creating new Process Builders or Workflows, we have taken the initiative to build our customer solutions in Flows.

As the name suggests, flows are designed with a Trigger Object followed by an immediate or delayed action. Once you get comfortable with them, you can even trigger different actions based on a decision. For example, if an employee status is 'Active', do X action, or if the employment status is 'Pre-Joiner' do Y action.

Access flows

- Sending emails both instantly or on a specific date
- Updating fields on an object by either a change on that same object or an additional object
- Deleting D&I Data when required (Additional approval from Sage People is required)
- Sending a PDF Template

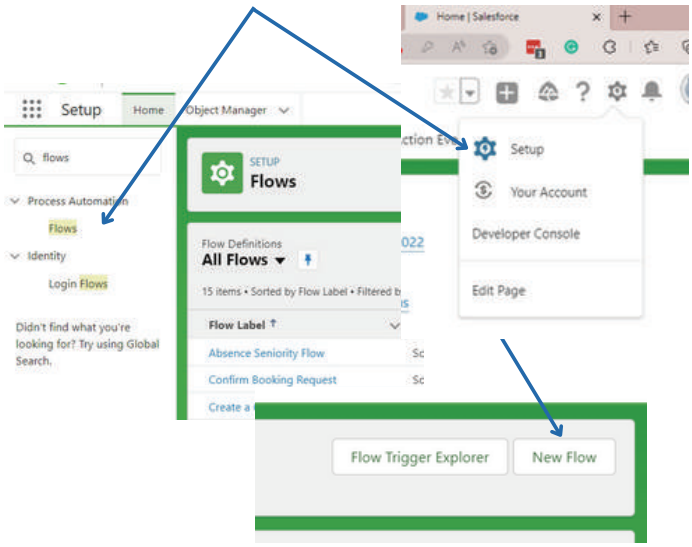
We plan to publish a series of guides to provide our clients and Sage People users with an insight into flows and how you can use them to enhance your system automation.

This month's guide will start at the beginning of Trigger Object.

Part One: Trigger Object

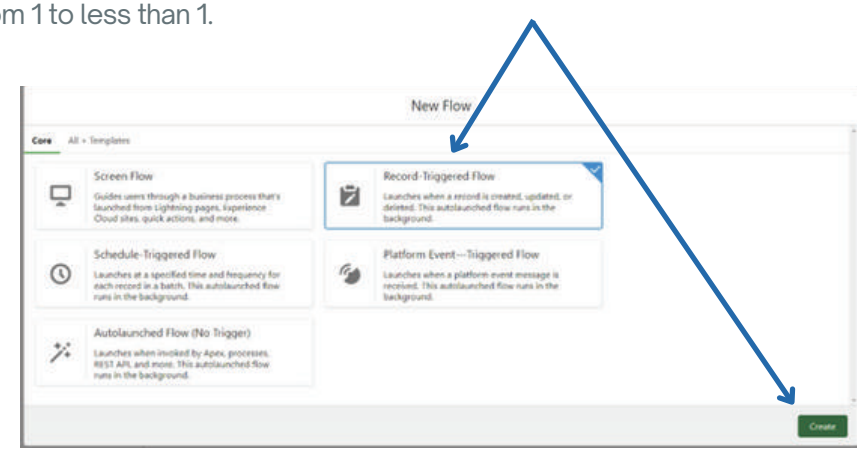
Access flows

To access flows, go to: Set Up> Flows> New
(You will need to have system administration access)



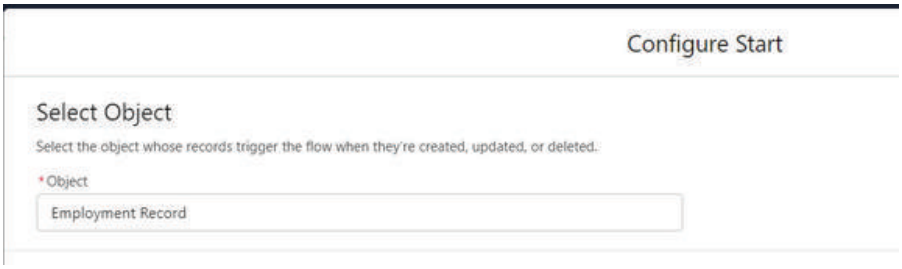
Next, you must select how you want your new flow to be triggered. Sage People only support Record Triggered Flows, i.e. something on a Record Triggers the flow.
Select Record-Triggered Flow > Create

You will then be asked to configure the Start Action.
In the example below, the objective is to update the basis when the FTE (Full Time Equivalent) is changed on employment from 1 to less than 1.



Select Object

The triggering object will be the Employment Object, as this is where the FTE field is kept.



Configure Trigger

The Trigger of the flow should be decided as follows:

- When a record is created for the first time
- When a record is updated at any point
- When a record is either created or updated
- When a record is deleted

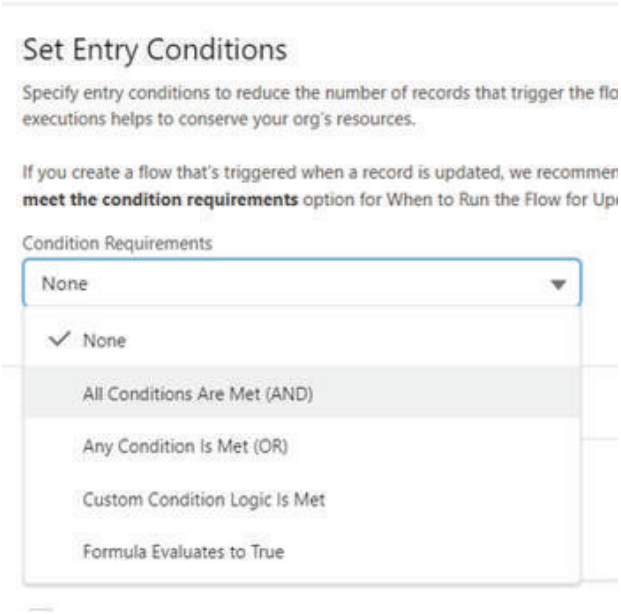
In our example, we would want the flow to be evaluated when a record is created or updated.

Set Entry Conditions

Within the Set Entry Conditions, you can set conditions that must be met for the flow to Trigger. You have the option to:

1. Set all Conditions are met (AND), e.g. must be in X Department and Y Location
2. Set Any Conditions is met (OR), e.g. Can be in X Department or Y Location
3. Custom Logic is Met, similar to reports. You can customise the logic so that it triggers if both and or conditions are met. E.g. X Department, and Y Location or Z Location. This would be written as "1 AND (2 OR 3)"
4. Formula Evaluates to TRUE. Similar to creating a formula field in an object, you can write a formula that, if true, the flow will trigger. You would not need an if statement e.g.

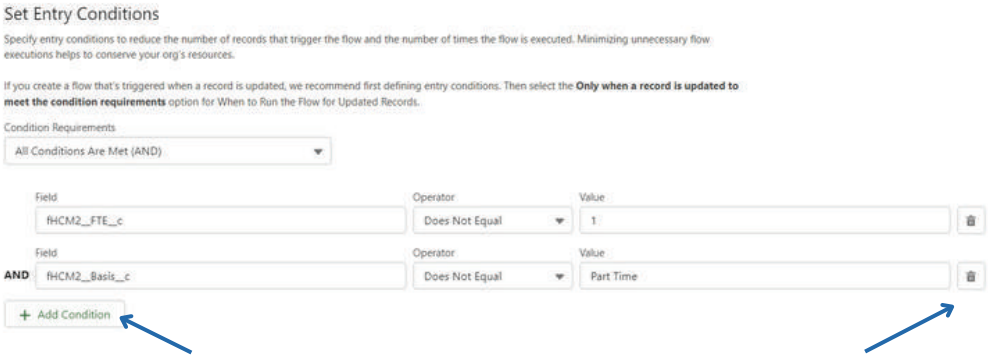
   Department = “X” &&
   Location = “Y” ||
   Location = “Z”



In the example, we will use All Conditions Are Met (AND) because we want to trigger the flow if the employment record is created or updated AND if the FTE does not equal to 1 AND the Basis is Part Time.

If a record is updated and the FTE is 0.6 (i.e. less than 1), but the basis is 'Full Time', then we want the flow to trigger to update the basis to 'Part Time'.

However, if the basis is already Part Time, then there is no need to update the record.



You can use the 'Add Conditions' button to add more conditions if needed or the 'Bin' icon to delete if no longer required.

When to Run the Flow for Updated Records

This section will dictate when to run the flow. Getting this option correct can result in a more efficient flow process. Reducing the number of times a flow is run prevents the system from being clogged up unnecessarily.

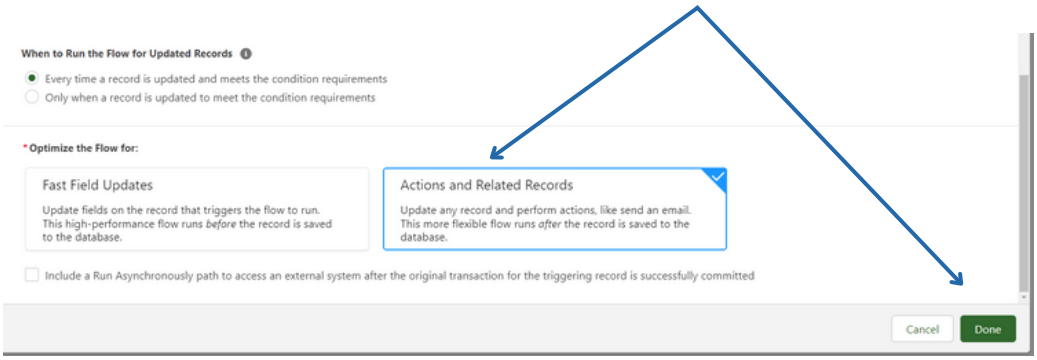
Every time a record is updated and meets the condition requirements:

If selected, the flow will trigger anytime a record is created and/or updated, and the conditions are true. This can result in the flow running when not necessarily needed. Using this option means that if there is a change and the FTE is not 1, the flow will run regardless of what has been updated on the record.

Only when a record is updated to meet the condition requirements:

If selected, a record will only be triggered if it is updated to meet the conditions. In our example, this is what we require as we only need to trigger the flow if the FTE Is changed to not be 1.

To finish the Trigger Object decisions, select 'Actions' and 'Related Records', then 'Done'



This covers the first step of the flow building process. Look out for next month's article, where we will build the actions the flow will trigger.

Should you have any questions, require support, or simply want to revel in your working flow, please reach out - we would love to hear from you.

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