

Utilizing Automated Flows With Flow Builder



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Introduction

This document serves as a configuration guide for integrating process builder and automated flows with the Automation Anywhere Salesforce app. To start we have a pre-configured bot that we gave the Name “Support Bot” if you want to follow the process here. You will need to configure one bot with the same name. Make sure that the bot is mapped for the object that initiates the process and automated flow. For our example we are using the Case Object.

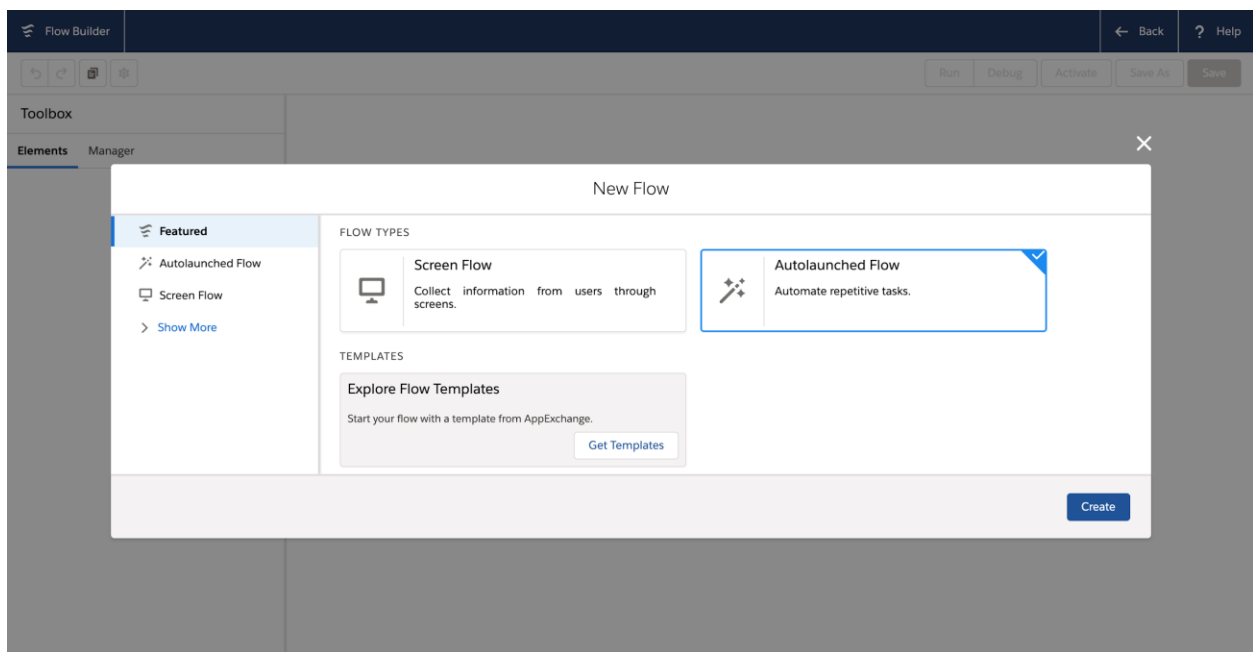
Flow Builder

Flow Creation

Navigate to setup in your salesforce org (Not the Automation Anywhere Setup but the one that exists under the lightning gear icon in your salesforce org), then search and select “Flows” under the *Process Automation* subcategory.

Select the **New Flow** button and a new screen will load with a modal that appears.

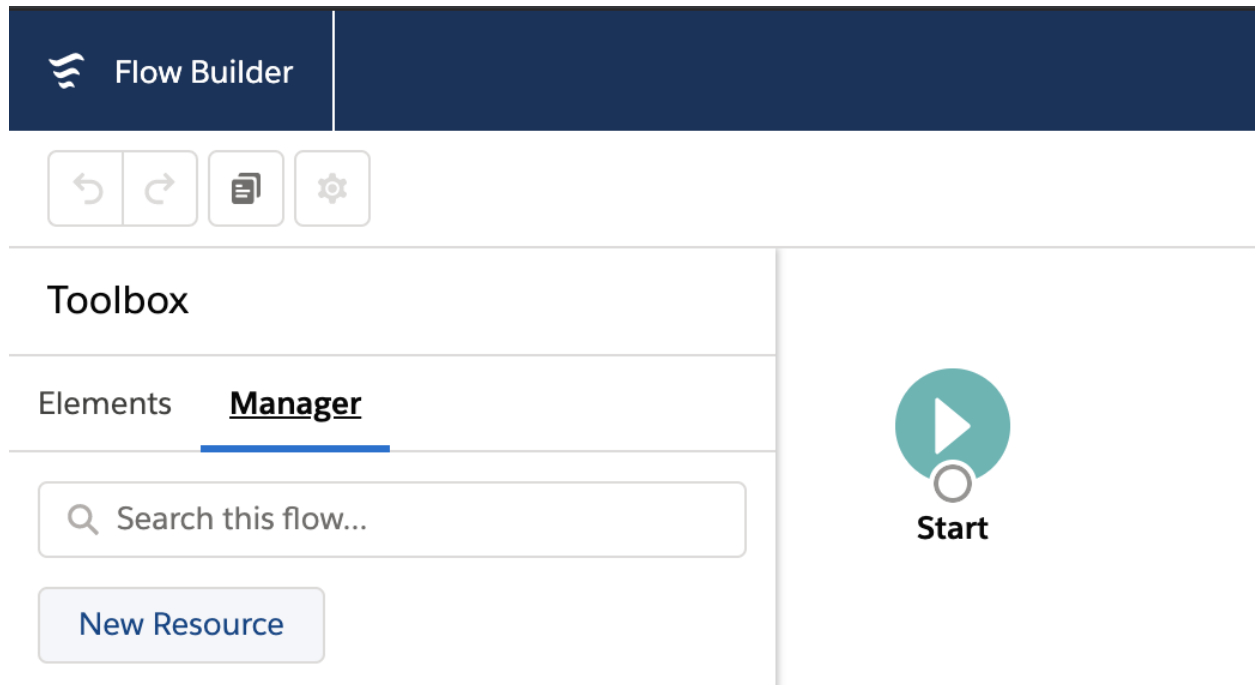
Select the **Auto-launched flow** option and then click **Create**.



Flow Setup

Next we need to create some variables to store information we plan on receiving from a process we created in the process builder. For our purposes we will pass in the name we gave to a configured bot that was setup (we will use the unique name to filter out records when we search for them in flow builder), and the record Id of the object that triggered the process (which will be passed to our invocable method). So this leaves us with 2 variables that will be available for input.

In the flow builder toolbox section on the left hand side of the screen select the **Manager** tab and click the **New Resource** button.



Select the drop menu to open up the options and then click **Variable**

The first variable we create will have the API name **Bot_Name**

For the Data Type: select **Text**

Select the checkbox **Available For Input** (this will allow us to pass a text value into the flow from process builder). Ignore all other fields and click the blue **Done** button.

New Resource

* Resource Type
Variable

* API Name
Bot_Name

Description
Stores the name of the bot configuration we want to run that passed from process builder

* Data Type
Text

☐ Allow multiple values (collection) ⓘ

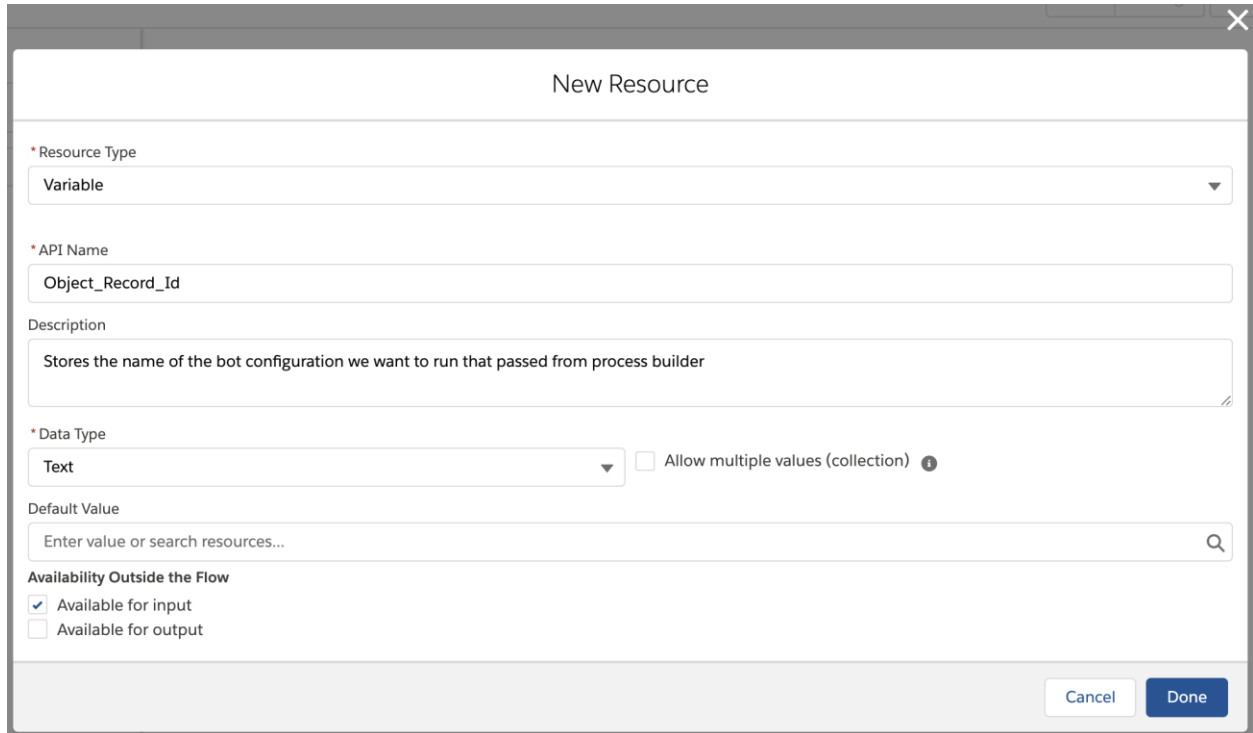
Default Value
Enter value or search resources...

Availability Outside the Flow
☒ Available for input
☐ Available for output

Cancel Done

Repeat the same steps above to create another variable and give it the api name

Object_Record_Id

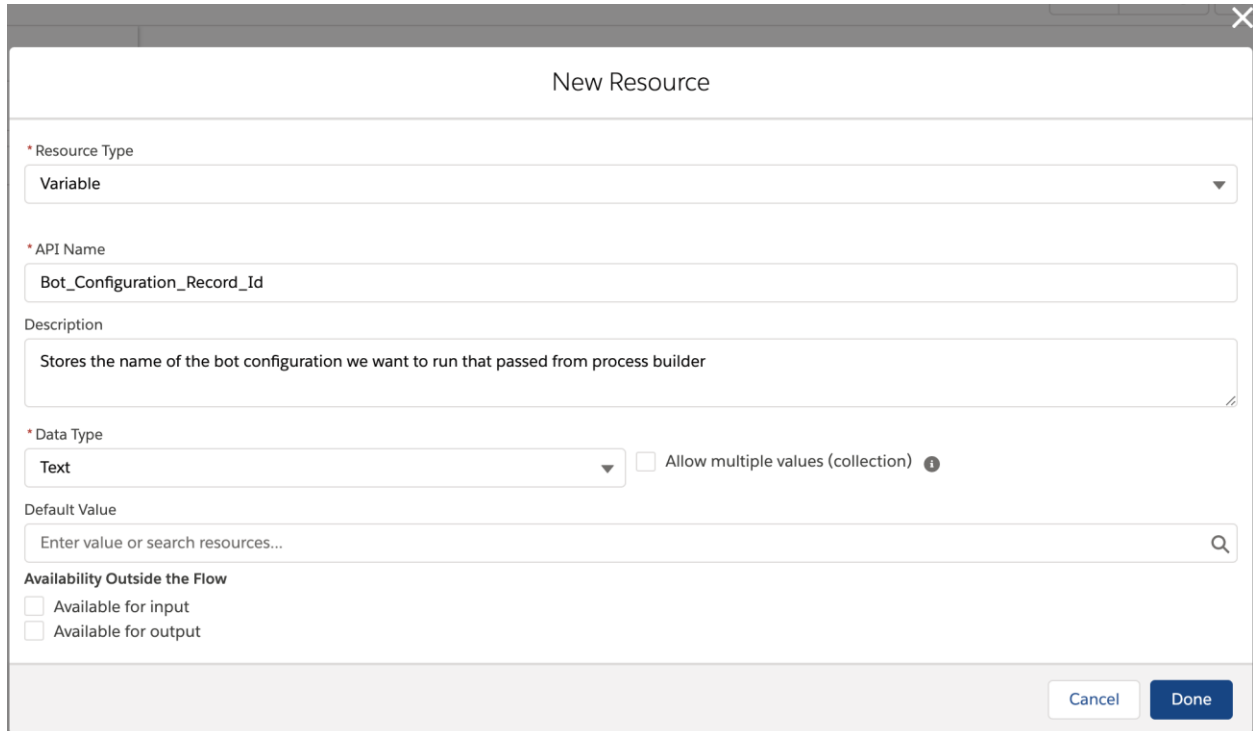


The screenshot shows a 'New Resource' dialog box with the following fields and options:

- * Resource Type:** A dropdown menu with 'Variable' selected.
- * API Name:** A text field containing 'Object_Record_Id'.
- Description:** A text area containing 'Stores the name of the bot configuration we want to run that passed from process builder'.
- * Data Type:** A dropdown menu with 'Text' selected. To its right is a checkbox labeled 'Allow multiple values (collection)' which is unchecked, followed by an information icon.
- Default Value:** A text field with the placeholder 'Enter value or search resources...' and a search icon.
- Availability Outside the Flow:** Two checkboxes: 'Available for input' (checked) and 'Available for output' (unchecked).

At the bottom right of the dialog are 'Cancel' and 'Done' buttons.

Repeat the same steps above (except you do not need to check the Available for Input box because the variable is only used from inside the flow) to create another variable and give it



The screenshot shows a 'New Resource' dialog box with the following fields and options:

- * Resource Type:** A dropdown menu with 'Variable' selected.
- * API Name:** A text field containing 'Bot_Configuration_Record_Id'.
- Description:** A text area containing 'Stores the name of the bot configuration we want to run that passed from process builder'.
- * Data Type:** A dropdown menu with 'Text' selected.
- Allow multiple values (collection):** An unchecked checkbox.
- Default Value:** A text field with the placeholder 'Enter value or search resources...' and a search icon.
- Availability Outside the Flow:** Two unchecked checkboxes: 'Available for input' and 'Available for output'.
- Buttons:** 'Cancel' and 'Done' buttons at the bottom right.

the api name **Bot_Configuration_Record_Id**

Fetching A Bot Configuration Record

After adding the resources above we will now begin building the flow. In the toolbox select the **Elements** Tab.

Select and drag the **Get Record** element onto the flow builder section of the screen.

Toolbox

Elements

Manager

Interaction (2)

 Action

 Subflow

Logic (4)

 Assignment

 Decision

 Pause

 Loop

Data (4)

 Create Records

 Update Records

 Get Records

 Delete Records

For the label we can just use **Get Bot Configuration Record**. Once you select out of the label section the API Name should auto-fill.

For the object type under the *Get Records of This Object* section: search and select **Bot Configuration**



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Under the Filter Bot Configuration Records Section make sure the Condition Requirements has **Conditions Are Met** selected.

In the Field Section type **Name** and select the **salesforce standard name field** not the custom field Bot__Name__c.

For the operator select **Equals**

For the value set it equal to the variable we created **Bot_Name**

Bot Runner Flow - V1

Edit Get Records

Find Salesforce records and store their field values in flow variables.

* Label: Get Bot Configuration Record

* API Name: Get_Bot_Configuration_Record

Description:

Get Records of This Object

* Object: Bot Configuration

Filter Bot Configuration Records

Condition Requirements: Conditions are Met

Field	Operator	Value
Name	Equals	{!Bot_Name}

+ Add Condition

Sort Bot Configuration Records

Cancel Done

Under the *How To Store Record Data* section select **Choose fields and assign variables (advanced)**.

Under the *Where to Store Field Values* section select **In Separate Variables**.

For the field enter **Id** and make sure to select the option that says **Record Id** and not the option for Bot_Id__c

For the variable to map the record Id to select the variable **Bot_Configuration_Record_Id** that we created for storing the bot configuration record Id.

Click **Done**.

Bot Runner Flow - V1

Edit Get Records

Sort Bot Configuration Records

Sort Order

Not Sorted

⚠ If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

☒ Only the first record
☐ All records

How to Store Record Data

☐ Automatically store all fields
☐ Choose fields and let Salesforce do the rest
☒ Choose fields and assign variables (advanced)

To use the returned **Bot Configuration** records in the flow, store their fields in variables.

Where to Store Field Values

☐ Together in a record variable
☒ In separate variables

Select Variables to Store Bot Configuration Fields

Field

Id

→

Variable

{!Bot_Configuration_Record_Id}

VARIABLES

Bot_Configuration_Record_Id

Text

+ Add Field

☐ When no records are returned, set specified variables to null.

Cancel

Done

In the flow builder section connect the start element to the element we just added if the builder hasn't already done it for you. In the following actions there will be a white circle outlined in grey towards the bottom of the element, you can drag this to new elements to connect sequences of actions in the flow.

After we create the get record method to store the record Id of the bot configuration record (this is filtered by the Bot Name we will enter later in process builder), We now call the

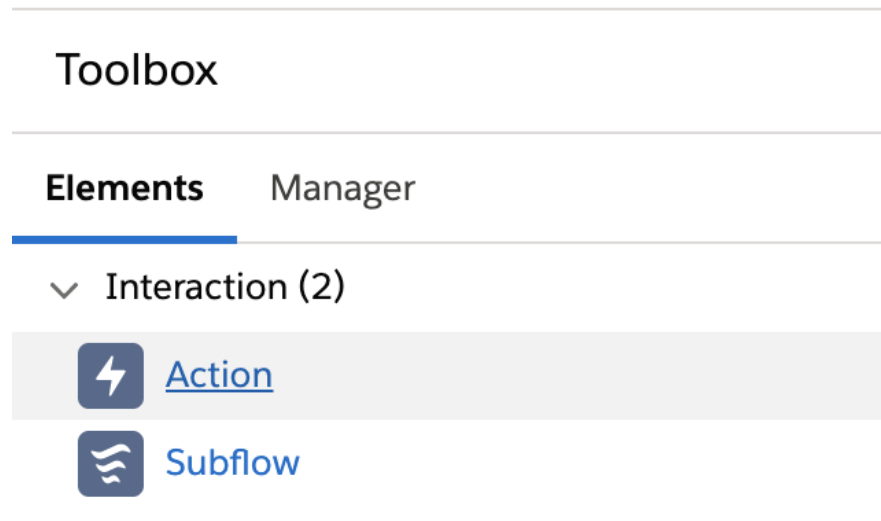



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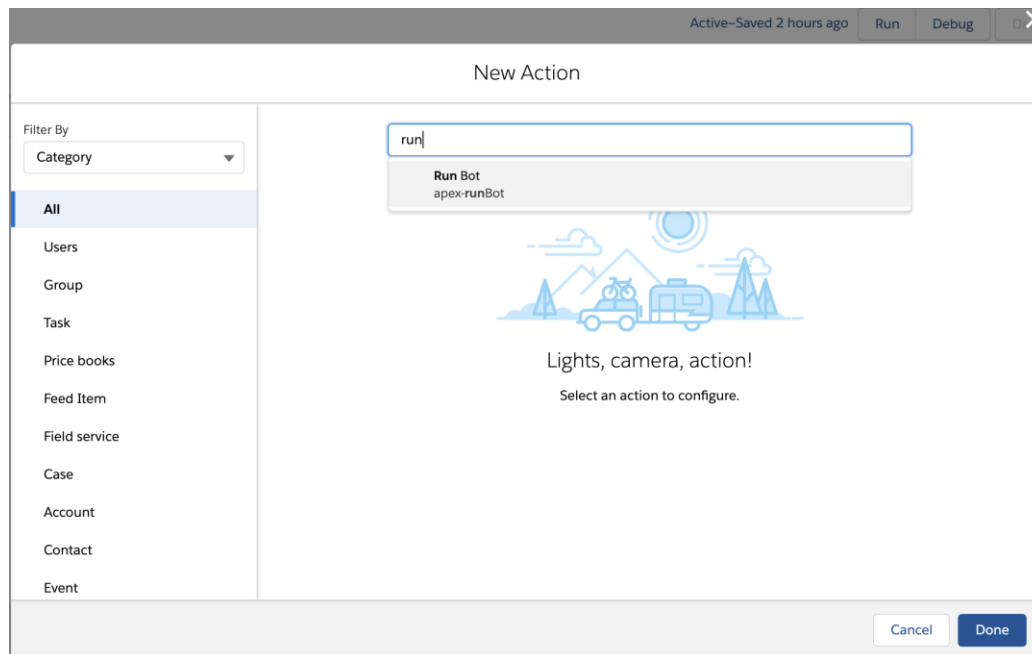
invocable method and pass it the variables we have created that hold the data required to run the invocable method.

Calling The Invocable Method

Navigate to the **Elements** tab in the Toolbox and then drag and drop the **Action** element onto the flow builder screen.



In the search bar that says search all actions, enter and select the apex **Run Bot** method.



For the label enter **Run Bot** click out of the input and the api name should auto-fill.

Under the Set Input Values Section

- For **configurationId** set the value equal to the variable **Bot_Configuration_Record_Id**
- For the **recordId** field: set the value equal to the variable we created **Object_Record_Id** which is the variable that stores the record id of the record that started the process that calls this flow.
- Click **Done**.

Bot Runner Flow - V1

Edit "Run Bot" Apex action

Use values from earlier in the flow to set the inputs for the "Run Bot" Apex action. To use its outputs later in the flow, store them in variables.

* Label
Run Bot

* API Name
Run_Bot

Description

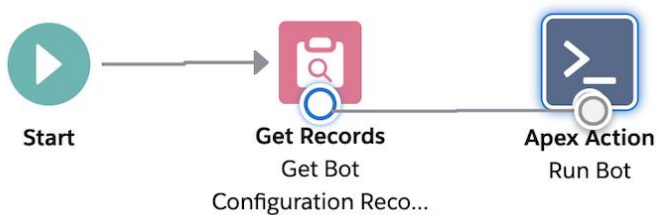
Set Input Values

A_a
* configurationId
{!Bot_Configuration_Record_Id}

A_a
* recordId
{!Object_Record_Id}

Cancel
Done

Connect the get record element that we create earlier to the apex action that we just created.



The flow is now built. Click the **Save** button in the upper right hand corner of the flow builder give your flow a name like **Automated Bot Runner Flow** and then click **Save** again at the bottom of the modal and then click **Activate** upper right hand corner of the screen.

Process Builder

Process Builder Creation

Now we will create the process that gets triggered and call this flow from that process. Exit the flow builder and navigate to **Process Builder** in Setup and click **New**.

We will name this **Run Support Bot On Case Creation**. After you select out of the Process Name field the Api Name should auto-fill.

Under the *process starts when* picklist dropdown select **a record changes**.

Click **Save**.

New Process

Process Name *

Run Support Bot On Case Creation

API Name * ⓘ

Run_Support_Bot_On_Case_Creation

Description

The process starts when *

A record changes ▼

Cancel

Save

Process Builder Setup

A new screen will load with an empty process builder template

Click the **Add Object** button in the process builder view

For the object type select **Case**

Select **only when a record is created** for when to start the process.

Click **Save** at the bottom of the side menu

Choose Object and Specify When to Start the Process ?

Object * i

Case ▼

Start the process *

☒ only when a record is created

☐ when a record is created or edited

> Advanced

Save Cancel

Click the **Add Criteria** button

Enter **None** for the criteria name

Select **No Criteria - just execute the actions!** for the criteria for executing the actions.

Click **Save**.

Define Criteria for this Action Group

Criteria Name * 

None

Criteria for Executing Actions *

- ☐ Conditions are met
- ☐ Formula evaluates to true
- ☒ No criteria—just execute the actions!

Save

Cancel

Calling An Automated Flow

Click **Add Action** under Immediate next to the criteria we just added.

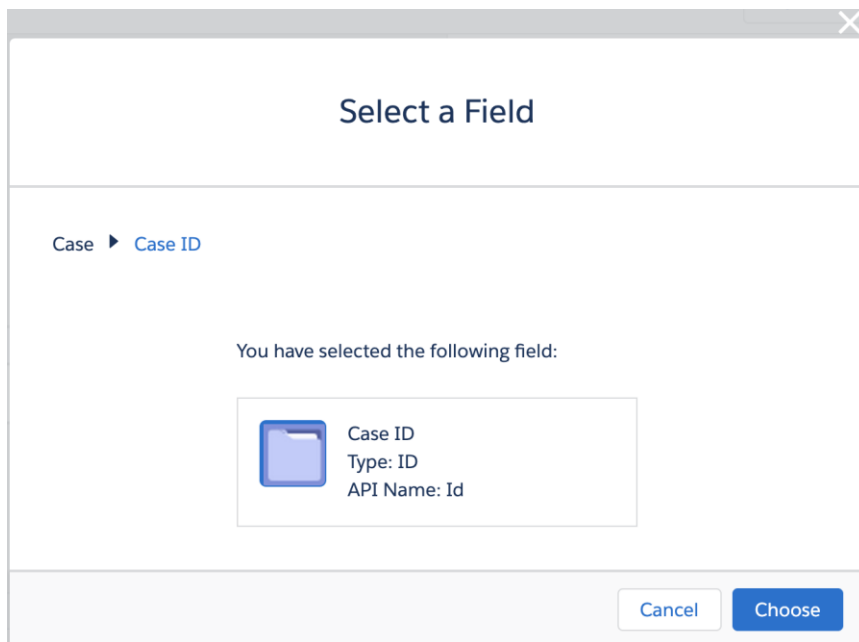
For the **Action Type** select **Flows**

For the **Name** of the action enter **Run Support Bot Flow**

For the Flow search and select the **Automated Bot Runner Flow**. This is the flow we just created, if you do not see it make sure that it was an autolaunched flow and that it is activated and then it should appear in the menu.

Under the **Set Flow Variables** section click **Add Row**

- For the flow **variable** search and select **Object Record Id**.
- For **Type** select **Field Reference**
- For **Value** search and select the record id for the case **Case ID**.



Click **Add Row**.

For the flow **Variable** Select the **Bot_Name** variable that we created in the flow builder.

For **Type** select **String**.

For **Value**, type **Support Bot**. (This is the name that we gave to Bot Configuration that was setup earlier).

Click **Save**.

Launch a Flow

Action Name *

Run Support Bot Flow

Flow *

Automated Bot Runner Flow

Set Flow Variables

Flow Variable *	Type *	Value *
Object_Record_Id	Field Reference	[Case].Id
Bot_Name	String	Support Bot

+ Add Row

Save

Cancel

Delete

Click the **Activate** button in the upper right hand corner of the process builder screen.

Click **Confirm**.

Your bot should run now after you create a case record.

