

Deadline Manager for Orchestrator

Prerequisites

SLACK PACKAGE INSTALLATION

For receiving notifications in your Slack application, it is necessary to install the Slack Package after installing the Deadline Manager for Orchestrator Package

1. Visit the [Slack listing](#) in the AppExchange
2. Click **Get It Now** to install the package to your production or sandbox environment.
3. Select **Install for Admins Only**.
4. Click **Install**.
5. Review the list of third-party websites and check the box next to **Yes, grant access to these third-party websites**.
6. Click **Continue**.
7. Once installation is complete, click **Continue to Setup Assistant**.

Once you reach this point, the Slack package will be installed!

ONE TIME SETUP FOR SLACK CONFIGURATION

Now it is time to grant Slack access to Salesforce

1. From Salesforce Lightning, open the **App Launcher** and select the **Slack Setup Assistant** app. From Salesforce Classic, click the **plus button** at the top of the page, then find and select **Slack Setup** from the list.
2. Click **Get Started**.
3. Click **Authorize** to grant Slack access to your Salesforce org.
4. Enter your Salesforce credentials, then click **Finish**.
5. Click **Continue** to move on to the next step.
6. **Enable Custom Objects**
 - a. Click **Add Custom Object**.
 - b. Choose the object you'd like to enable from the drop-down menu. In this case, it will be **Deadline Object**
 - c. Check the boxes next to the additional fields you'd like to display with the record name in Slack. You can check up to nine. In this case, you will choose: *Associated Record*, *Deadline Date*, *ReceiverUser*, *Record ID*, and *Referred to*
 - d. Click **Add**.
 - e. Click the **Activate** link, then select **Automatic Activation**. If automatic activation fails, you'll need to activate the object manually to make it accessible in your Salesforce org.
 - f. Click **Activate** to confirm.
 - g. Click **Finish**.
 - h. Click **Continue** to move on to the next step.
7. It is not necessary to configure Custom Alerts neither Page Layouts. Just click **Finish** to move to the next step
8. **Automation Configuration**. You need to create two message destinations, that will be the channels or persons that will receive the notification. One message will be for the Deadline Owner or User, and the other one for his/her manager.
 - a. Click **Sign in with Slack** to authenticate.
 - b. Below **Configure Message Destinations**, click **New Message Destination**.

- c. Call the Message Destination **Message to User**
- d. Enter a message destination name. Select a workspace, then choose a channel or direct message from the drop-down menu.
- e. Click **Save**.
- f. Click **Finish**.
- g. Click the **file icon** to the right of a message destination to copy it so you can add it to the **Message Destination ID** field in the next step.
- h. Repeat the process and create a new Message Destination named **Message to Manager**

You can start sending messages to you Slack App from now!

Flow Components

Deadline Manager

Automatic flow that has to be called when a deadline starts to create the deadline itself and manage the different type of releases associated to it (release the process before or after the due date).

*Notifications

Automatic flow that starts the notification process when a deadline has been marked as “Overdue”. It can notify to users and managers via Slack, Email or InApp Notifications.

Deadline Resumer

Automatic flow that has to be called when the last activity of the deadline has been completed to release the created deadline before the due date.

DLN_Enrollment Example

Orchestrator sample process to show the capabilities of the deadline manager. *Included only for testing purposes.*

DLN_Flow_Orchestrator_Starter

Sample screen flow to start a prebuilt example on how to manage deadlines. It can be included on an application page to be able to select the different inputs for the “DLN_Enrollment Example” Process and start a new one. *Included only for testing purposes.*

DLN_Create Enrollment

Sample screen flow used in the “DLN_Enrollment Example” Process to simulate a manual task that has to be completed before a deadline. *Included only for testing purposes.*

DLN_Start_Enrollment_Orchestration (APEX class)

Apex class for testing purposes to create a new DLN_Enrollment Example process instance with the parameters included on the flow DLN_Flow_Orchestrator_Starter

How to create a new Deadline

In order to manage deadlines, you have to include two different background stages on your orchestrator flow.

1. Create deadline step using the “Deadline Manager” flow. In order to create a deadline, you must include this background step at the moment of your orchestration that you want the deadline to be started.

NOTE: It is mandatory to check “**Contains external callouts or pause elements**” because Deadline Manager uses a pause inside the flow.

- **Deadline_DateTime:** Date Time variable that defines the due date. If Deadline_Days is also included, the Deadline_DateTime value will be overwritten.
- **Deadline_Days:** Days that will be added to today's date to define the due date.
- **GUID:** It has to be set to internal variable {\$Flow.InterviewGuid}
- **IsReferredToStage:** If the deadline is referred to the whole stage or to a step.
- **NotificationType:** The type of notification that will be triggered in case of deadline. The possible values are INAPP, SLACK or EMAIL.
- **ReceiverUser:** The user that will receive the notification.
- **RecordId:** The record where the notification will be linked to.

2. Create resume deadline step using "Deadline Resumer" flow. In order to make the deadline manager aware about the ending of the deadlined tasks, this flow has to be called at the end.

- **GUID:** It has to be set to internal variable {\$Flow.InterviewGuid}
- **RecordId:** The record where the notification was going to be linked to.

Deadline Manager Example

In order to have a quick view about how to start working with your deadlines, we have included on the package an example for you convenience. Please, follow the steps to make it work.

- Please, give your user access to DLN_Training and DLN_Enrollment objects and access to DLN_Training tab. Also, allow the execution for DLN_Start_Enrollment_Orchestration apex class.
- Create at least one Training to be used in the example: just including a name and a description will be enough.
- Run the screen flow "DLN_Flow_Orchestrator_Starter" to start the example.

NOTE: When including "Number of days" the desired deadline date is omitted and the deadline date is automatically calculated via the number of days field.

DLN_Flow_Orchestrator_Starter

Hello Sonia!
This is a test flow to start a new Enrollment Orchestration so you can test how it goes.

* Desired Training
Training 1

Assignee
Sonia Escribano

Desired Deadline Date
30 may 2022 14:30

Number of Days
0

Notification Type
EMAIL

Siguiente

DLN_Flow_Orchestrator_Starter

A new orchestration has been triggered so you can test how deadlines work.

Anterior Finalizar

Once the orchestrator has started, you can test several things:

- A new work item for the Assignee will be created.

- A deadline record will be created with the data included on the flow.

If the work item is not completed before the deadline, a new notification (via the indicated channel on the flow) will be triggered to the assignee user (and also to the manager if the SLACK channel has been selected).

If the work item is completed before the deadline, no notification will be triggered.