

Case Study

ProcessClick – Your Agile BPM for Salesforce



PROCESSCLICK – CASE STUDY

Automating routine operations can save time and energy spent, supporting actions and operations with actionable data can improve a lot your workers' job. This particular business methodology goes under the Business Process Management (BPM) discipline, and that's what ProcessClick aim to do for companies - despite the industry or business, on the Salesforce platform.

Thanks to the high level of configurability with point & click tools, ProcessClick is ideal both for technical and business teams, improving the design and maintenance of complex business processes at every level of your organization, reducing errors and delays in the workflow.

APPROACH

ProcessClick is a modular automation framework to support the core element of companies on the CRM: processes. When solutions are structured, processes become more standard and the reuse becomes possible, reducing the code needed for the implementation and improving the overall governance of the system – year over year.

As a BPM solution, ProcessClick provides tools to design your business processes following a structured and well-proved paradigm. In a process-driven approach, we use the concepts of **process** and **phases** to build finite state machines.

*A **process** is a series of status and actions which are carried out in order to achieve a particular result, performed manually by the user or automatically by system. The **phase** is therefore the identifier of the state in which the process is located.*

*A finite **state machine** is a computation model that can be used to simulate sequential logic and some computer programs.*

In ProcessClick, *processes* are record types on Salesforce objects, while steps (*phases*) are picklist values on that object.

CONTEXT

Suppose you are called by your company to provide a comfortable and efficient way to **orchestrate business processes** through the Salesforce platform. To test platform capabilities, you're asked to configure and implement one of the most complex process of the Energy market: **Electrical Switch-in**, that is the change of the electrical supply manager in favor of your company, from the Service cloud operator perspective.

Analyzing the process lifecycle, we can define specific moments where ProcessClick can support the operations and drive the process. We'll evaluate them below.

START OF THE PROCESS

First, operators need to access an easy and immediate console that displays existing requests being serviced for a specific customer, as well as available services that can be offered.

This is possible thanks to the **Catalog**, a component that shows available processes as selectable cards in a front-end **dashboard**, useful to quick start a new service request. Available services appear in the dashboard only when possible, based on the availability rules you configured.

This way, you can define when each item should appear on a record, for example business accounts have different processes from person accounts, and only call center operators can start the **Switch-In** process on business account. Processes and rules are entirely configurable via point-and-click for implementation and maintenance ease.

Pressing on a catalog element, your users will be redirected to a dedicated page that handles that process, passing some contextual elements. For example, the Catalog can pass the type of the process, the specific Account ID, and so on. This is typically the entry point for your data entry procedure.

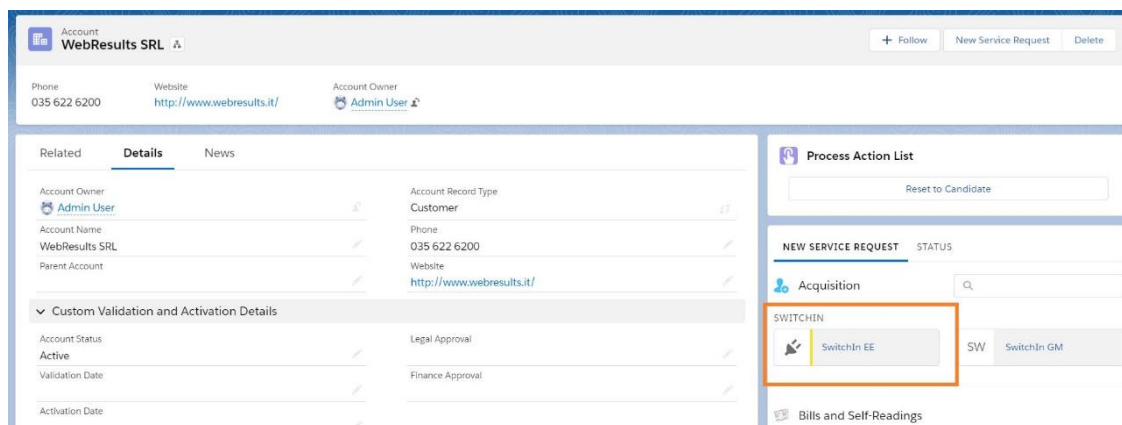


Figure 1 - Catalog with services available for the current record (Account)

COMPATIBILITY

Just after creating new processes or requests in the platform, a compatibility check is usually performed to prevent servicing multiple or incompatible requests.

Think a customer that calls you twice. If your operators try creating a second **Electrical Switch-In** process on the same customer or supply, they should face a compatibility block; thus, the overall system status will be maintained coherent, preventing duplicates and incompatible requests from the early stages.

Those kinds of rules are configurable in the backend of the app, using the Compatibility tool. After selecting your process, a compatibility table appear, and you can create a rule between two incompatible processes (identified by the row and the column) just by pressing on the cell.

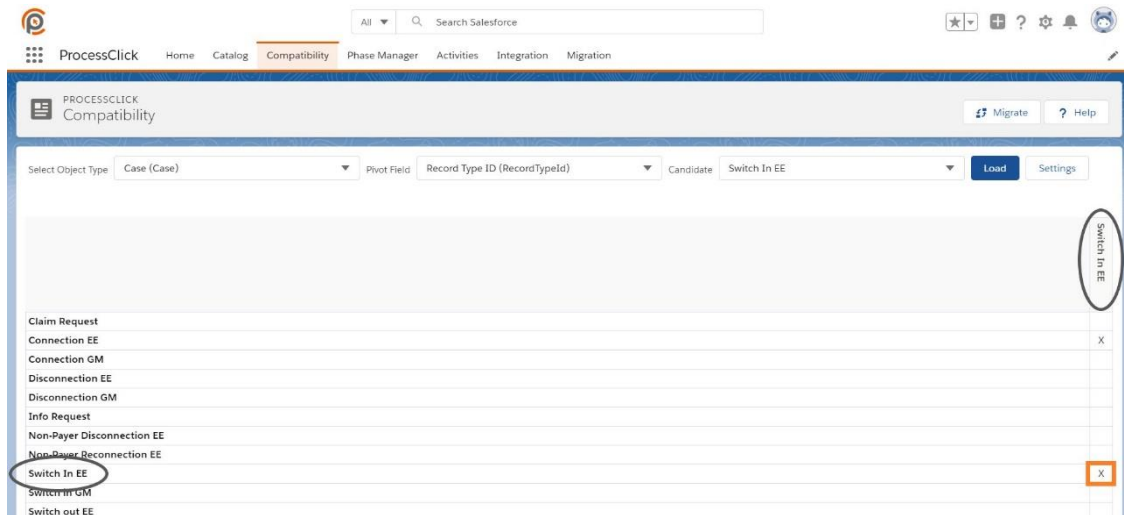


Figure 2 - Compatibility configuration example

In our example, two Switch-In EE processes cannot be opened at the same time for the same customer.

PHASE MANAGEMENT

Once a process is open, it can't be closed without following a path: Phase Manager orchestrates it as a process state machine and ensures each step is consistent with the use case. The Switch-In case follows specific status - phases - changes, described in a configuration that you can define according to your needs. The below representation is a compact view of a sample process we configured. We defined a naming convention for the status and then specified transitions between them: from the IR010 phase in the first row, the process can move to IR020 in the column, whereas if you attempt an illegal phase transition (DI010) you will receive an error.

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Figure 3 - Phase Manager configuration example



According to the configuration, from the **IR010** phase we have multiple phase transitions configured: we can either go to **IR020**, **BL010** or **RC010**. They represent alternative paths for the process that can be performed by human interaction (manually) or by automated procedures on the platform. Each transition accepts configurable conditions and actions to limit the visibility and define automations to be performed upon execution.

For example, a Salesforce user will see a manual button appear on a process layout, allowing to move the process from **IR010** to **IR020** whenever possible. This is because we configured a manual transition: a human interaction way to action the Phase Manager and drive the process into a new stage, according to the state machine configured.

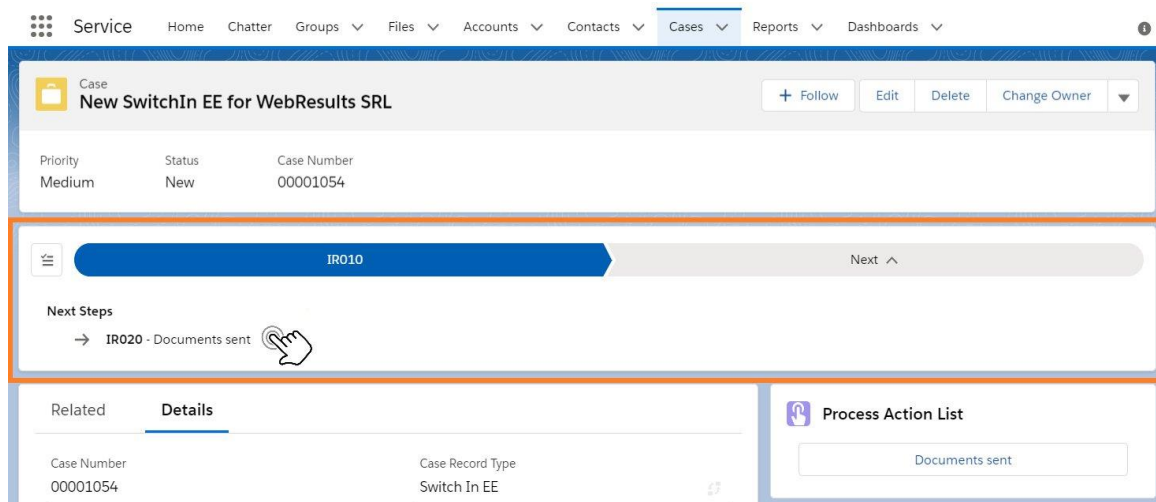


Figure 4 - Phase Chevron displays manual transitions for the record

With ProcessClick approach, the process lifecycle is **segmented, identified, configured** and thus **enforced** in real time during the execution of the process by its phase transitions matrix. With the benefit of a higher-level process governance.

The phase transition state machine is representable as a more readable status diagram (or transition diagram). This feature is always available just by pressing the **Flowchart** button on a process matrix, and acts as a self-documentation for the process running on the platform.

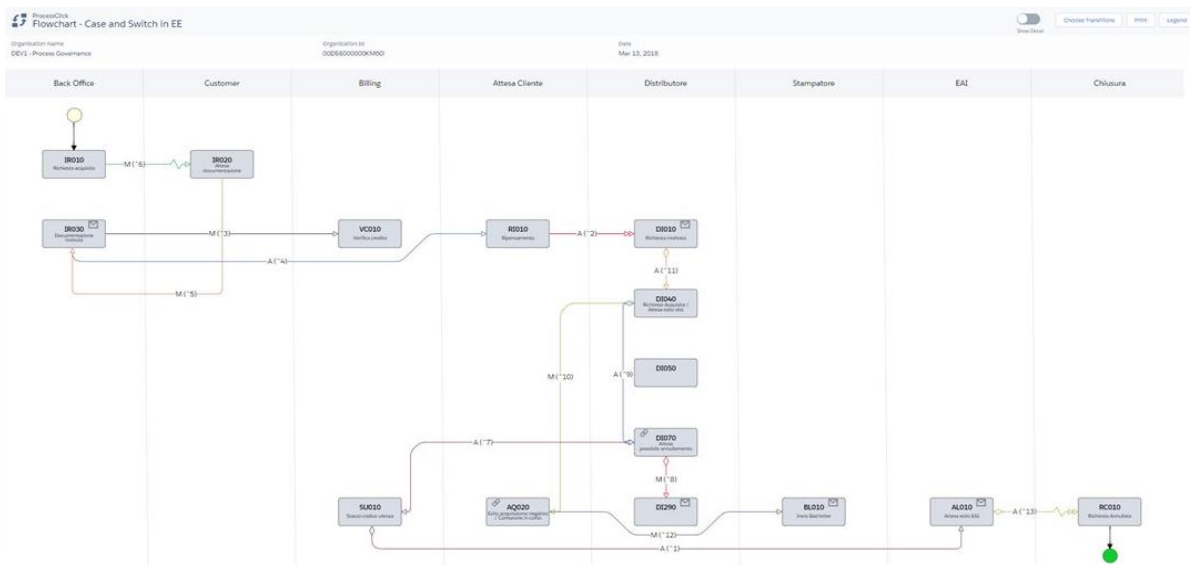


Figure 5 - Flowchart that represents the process state machine

ACTIVITIES

Upon phase changes, you can also configure the automatic creation of **Activities** assigned to specific Salesforce users or queues on the platform.

Case

New SwitchIn EE for WebResults SRL

+ Follow

Edit

Delete

Change Owner

Priority

Medium

Status

New

Case Number

00003414

☰

✓

IR020

Next ▾

Process Action List

Documents received

Activities (1)

ACT-0000000772

Description:

Reminder: verify documentation

Due Date:

13/11/2019 16:57

Status:

Not Started

View All

Related

Details

Case Number

00003414

Account Name:

WebResults SRL

Record Type Name:

Switch in EE

Contact Name:

Case Owner

WR Dev

Case Record Type

Switch in EE

Case Origin

Web

Phone

78000

Figure 6 - A ProcessClick Activity generated during the process lifecycle

This automation is configurable with a template logic that lets you define various aspects: when the Activity should be generated (the phase transition), the assignee, the due date, if it must be mandatory to move the process and so on. You can also define which fields of the process the user must populate in the Activity – they'll appear in a dynamic form generated by ProcessClick!

Upon completing the Activity, if we look at the **Phase Chevron**, we'll find that a new manual transition is available to move forward to the next phase **IR030**.

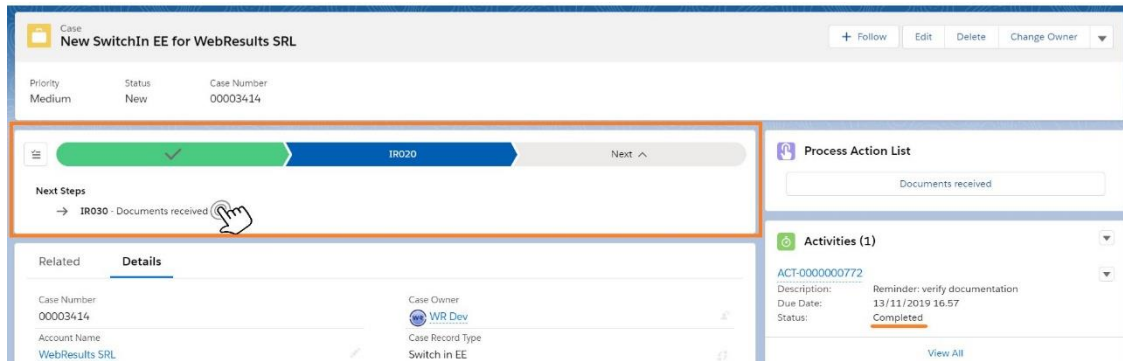


Figure 7 - Manual transition available on the record detail

INTEGRATIONS

When the process reaches specific phases, sometimes we need to communicate with external systems.

For example, when the process comes to the phase **IR030**, a call-out is sent to inform the billing system. This is something we can configure in the Phase Manager, by double-clicking on the envelope near to the **IR030** phase:

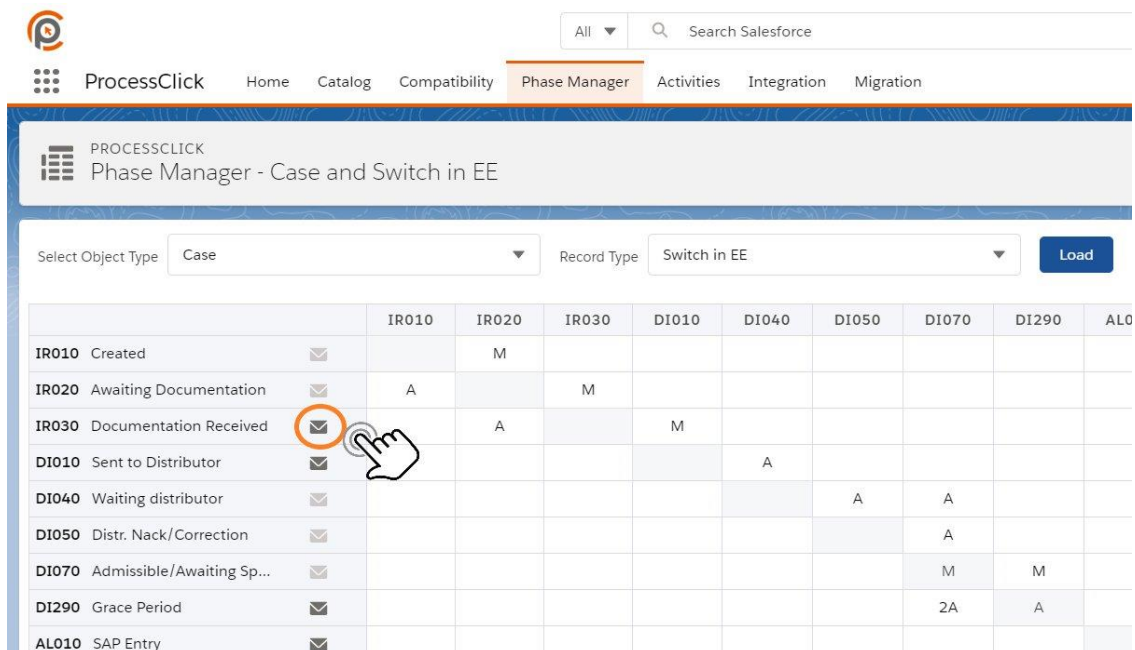


Figure 8 - Callouts sent when a phase is reached

As example of technical benefits, with this layer you can define templates to perform **selective callouts** on specific objects. This means you can declaratively select the fields to send in the message, from the current record, from parent records and child records as well. ProcessClick then creates the message with that information and send it to the external systems or EAI, handling retry mechanisms



in case of failure. Anyway, despite technical benefits, the underlying advantage of this integration is the clear vision of where/when messages should be sent in the state machine view of the processes.

DEPENDENCIES

ProcessClick also allows you to define **dependency logics**, useful when you want your process to wait for other parallel processes to execute their phase change, allowing a kind of start/stop logic based on other processes status. A simple scenario could be the wait for the Account validation to positively close the Case.

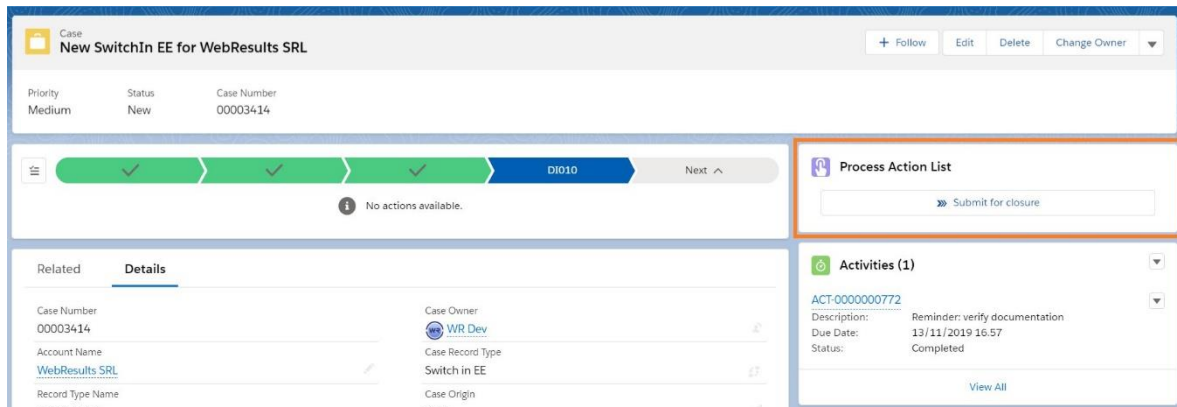


Figure 9 – ProcessClick action allows to perform a process closure

In the above example we don't have active dependencies and by pressing the action on the right, a manual action will move the Case to a closed status.

FINAL CONSIDERATIONS

After reading this ProcessClick use-case, you will be familiar with the **Catalog** that displays available processes for objects. You will be able to configure **Compatibility** rules to block/allow the creation of a processes. You will improve the overall system consistency by implementing a proper **Phase Management** as a logic representation of a state machine for your processes, configuring, describing and driving the complete life cycle of each business process, with **Integrations** as well. Automation will also be possible, thanks to actions and **Activity** management, creating and assigning template-based tasks during the execution of the process.

Now you can start configuring your business processes with ProcessClick!

CONTACTS

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