

A scenic background image showing a sunset or sunrise over a range of mountains. The sun is a bright, glowing orb in the center, casting a warm orange and yellow light across the sky and the mountain peaks. The mountains are silhouetted against the bright light, with some peaks showing more detail. The overall mood is serene and majestic.

Connecting Salesforce.com & Office 365 using Microsoft Flow & PowerApps

Jared Matfess

Solution Principal, Slalom

Boston Code Camp 27 - Thanks to our Sponsors!

■ Platinum



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Jared Matfess

Solution Principal, Slalom Consulting

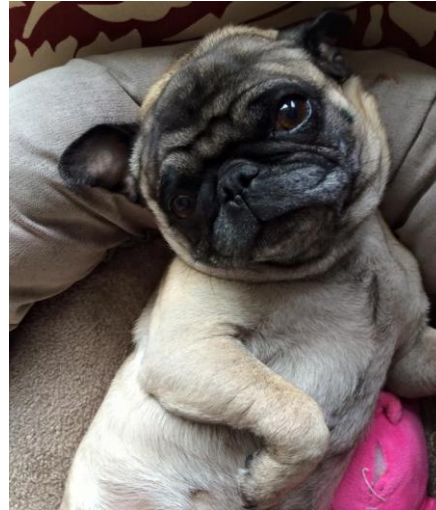


@jaredmatfess

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- Microsoft MVP
- Technology Consultant
- Craft Beer Snob



Session Agenda

- Quick Intro
- Overview of Salesforce.com
- Introduction to PowerApps
- Introduction to Microsoft Flow
- Demo all the things
- Resources

Session Caveat

- This session will not cover integrating Salesforce & SharePoint from a document management perspective



Overview of Salesforce.com (for an O365 crowd)

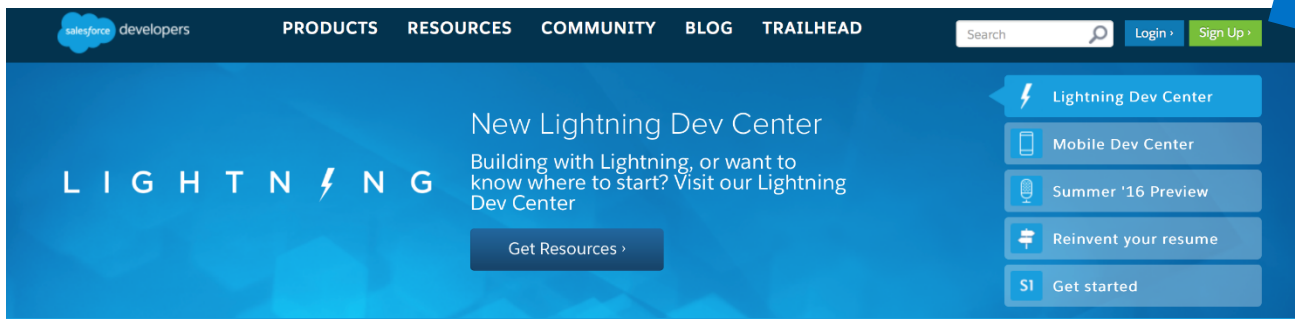
What is Salesforce.com?

Cloud Software as a Service (SaaS)

- Sales Cloud
- Service Cloud
- Market Cloud
- Community Cloud
- Chatter
- Analytics
- Apps



Sign up for Developer instance



The screenshot shows the top navigation bar of the Salesforce Developers website. The navigation bar includes links for PRODUCTS, RESOURCES, COMMUNITY, BLOG, and TRAILHEAD. A search bar is located to the right of these links. Further right are 'Login' and 'Sign Up' buttons. A large blue arrow points to the 'Sign Up' button. Below the navigation bar, the main content area features the 'New Lightning Dev Center' announcement, which includes the text 'Building with Lightning, or want to know where to start? Visit our Lightning Dev Center' and a 'Get Resources' button. To the right of this announcement is a vertical list of links: 'Lightning Dev Center', 'Mobile Dev Center', 'Summer '16 Preview', 'Reinvent your resume', and 'Get started'.



Get the flexibility and control to build, scale and manage all of your apps on a single, unified platform. Integrating core platform services such as Heroku Enterprise and Force.com, App Cloud adds new shared identity, data and network services. [Learn more about App Cloud](#)



Force.com
Everything to build social and mobile enterprise apps.



Lightning
Build beautiful apps fast with new dev tools & design resources



Heroku
Build customer apps in any language that instantly sync with Salesforce.



AppExchange
Distribute Force.com Apps and Lightning Components through the #1 enterprise app store

Community



Upcoming Events
Register for upcoming events and webinars.



Ask Questions
Get help when you need it from Salesforce & community experts



Join Your Local Dev Group
Meet other developers & get best practices for building on the App Cloud

Resources & Tools



Get Free Tutorials
Trailhead is the fun and free way to learn Salesforce



Force.com IDE
Develop & deploy Force.com apps with our free, Eclipse IDE




Latest Blog Posts
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Getting Started
Get free tools & learn how to build your first app

<http://developer.salesforce.com>


Trailhead for Additional Learning



the fun way to learn Salesforce

Everyone can learn Salesforce. Whether you are an admin, user, or developer, there is a trail for you.

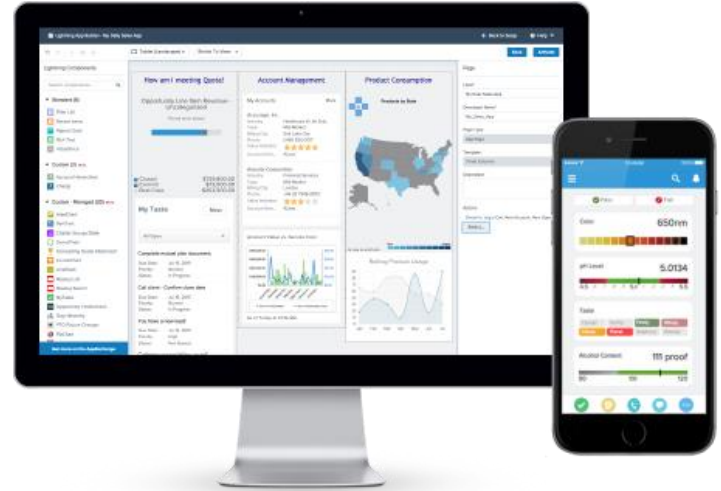
Start learning for free



<https://developer.salesforce.com/trailhead>

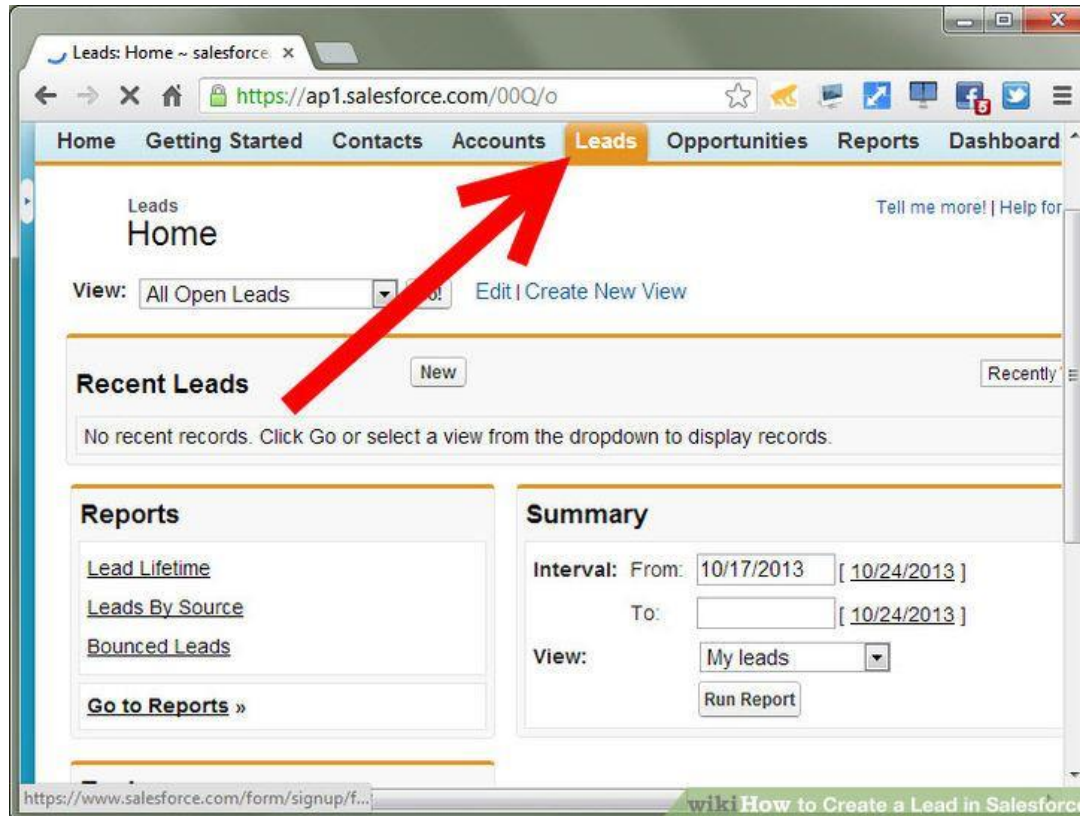
Salesforce Objects

- Similar to SharePoint Lists
 - Fields / Columns
- Pages are “Visual Force Pages”
 - Combination of HTML & Apex Code
- Salesforce1 Mobile App
 - “Integrate your custom apps” into this phone app



Tonight's Featured Salesforce Object

- The Lead 😊



Enabling Files Connect

I. Enable Files Connect

1. Setup>Customize>Salesforce files>Settings>Files Connect
2. Tick mark Enable Files Connect
3. Chose the File Sharing Type (Copy or Reference based on your requirement)

II. Once the above is done, Give Permission Set to user to use Files Connect Cloud

1. Go to Setup>Administer>Manager Users>Permission Sets
2. Create New and give the Name/Label
3. Inside the permission set, got to System Permissions under System
4. Click Edit and check the box which says: Files Connect Cloud.

III. Assign the permission set to the desired user

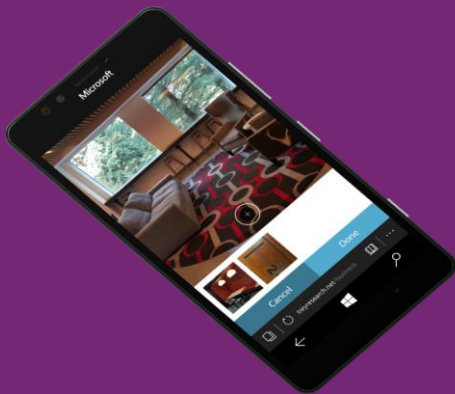
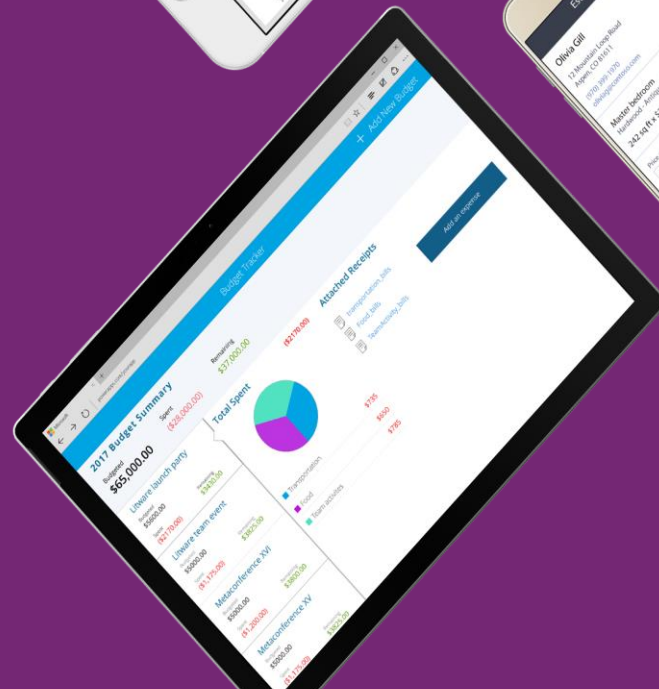
1. Go to Administer>Manage Users>Users
2. Click on the Users
3. Go to Permission Set Assignments
4. Click Edit Assignments
5. Select the newly created Permission Set and Add it to Enabled Permission Sets and Save.

IV. Check if you have the option under External Data Sources

1. Setup>Build>External Data Sources>New External Data Source
2. Select Type as Files Connect: SharePoint Office 365



PowerApps





when you're building business apps
it's hard to keep everyone happy

Secure

Scalable

Managed

Integrated

Compliant

VS

Fast

Iterative

Cross-platform

Beautiful

Easy

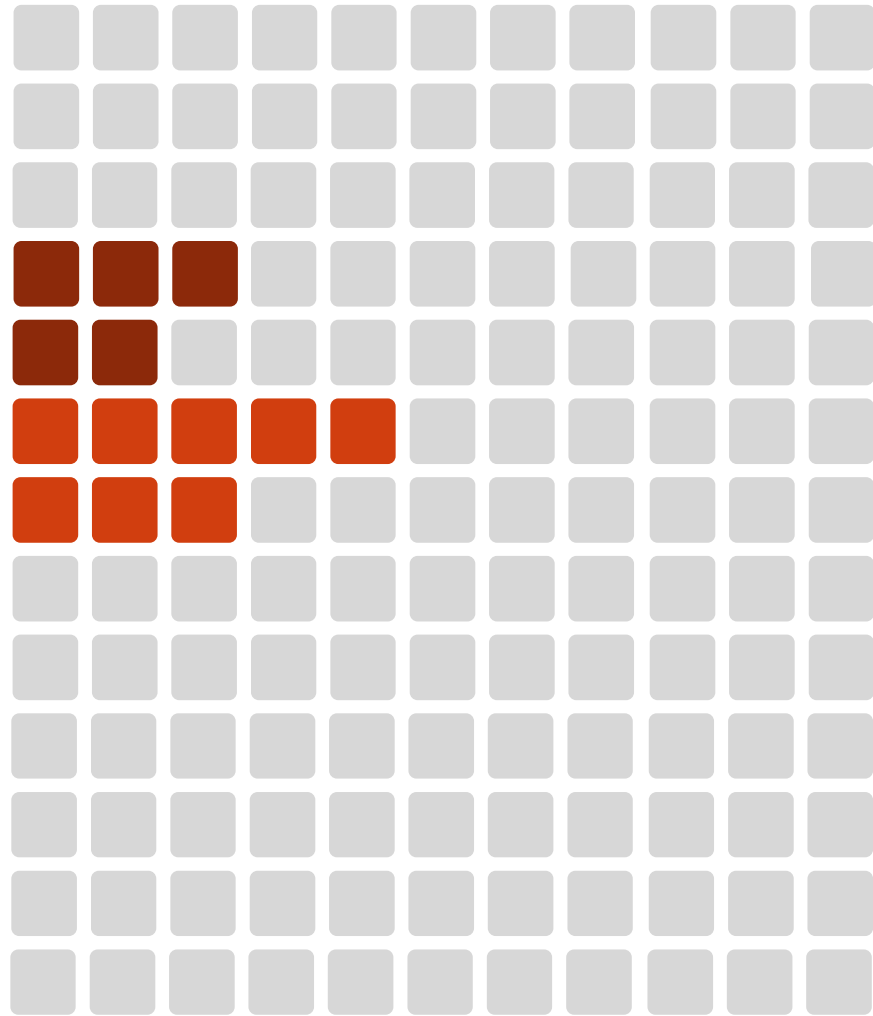
Gartner®

Demand for mobile apps
is growing **5x** faster than
IT departments can
deliver

Only a handful of business apps
merit the time and cost of
traditional **custom software**
development...

...and only so many problems can
be solved with **off-the-shelf SaaS**.

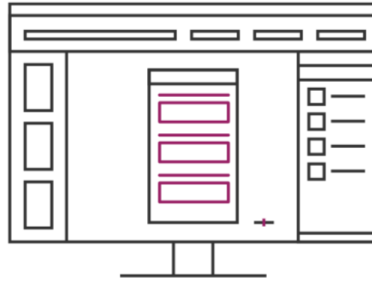
**What about every
other need your
business faces?**



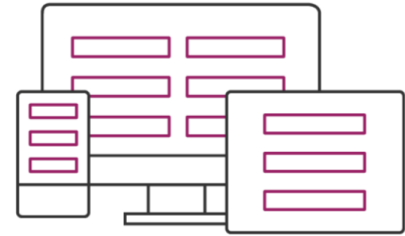
PowerApps is a service for low-cost rapid application development



Connect to data & systems you're already using; create the data you need



Create apps, forms, and workflows without writing code



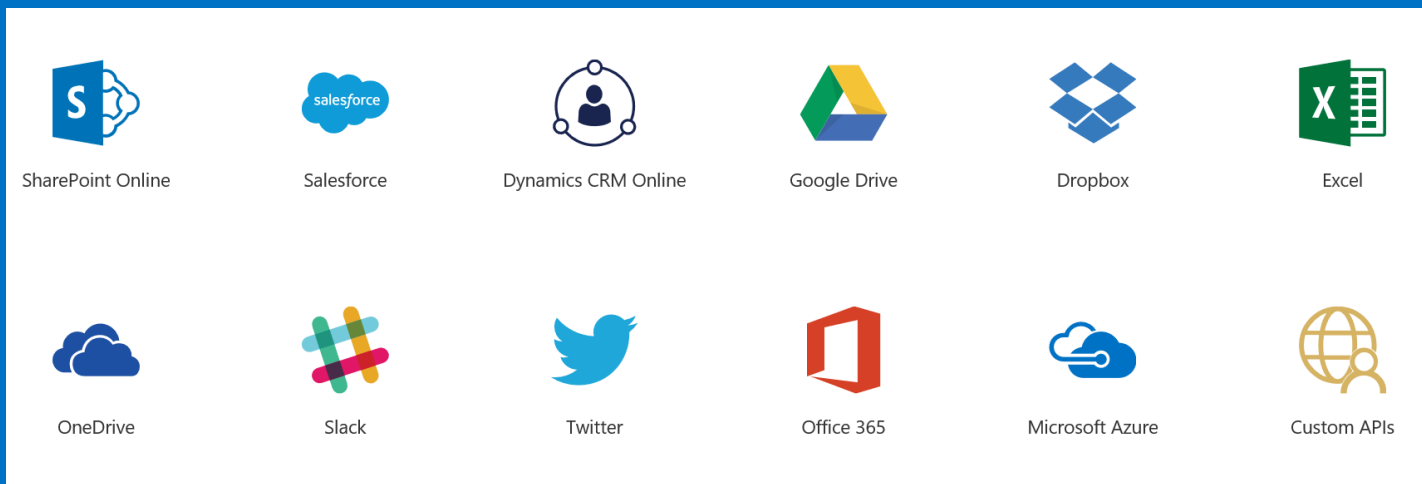
Use apps on web and mobile

Connect to cloud and on premises data

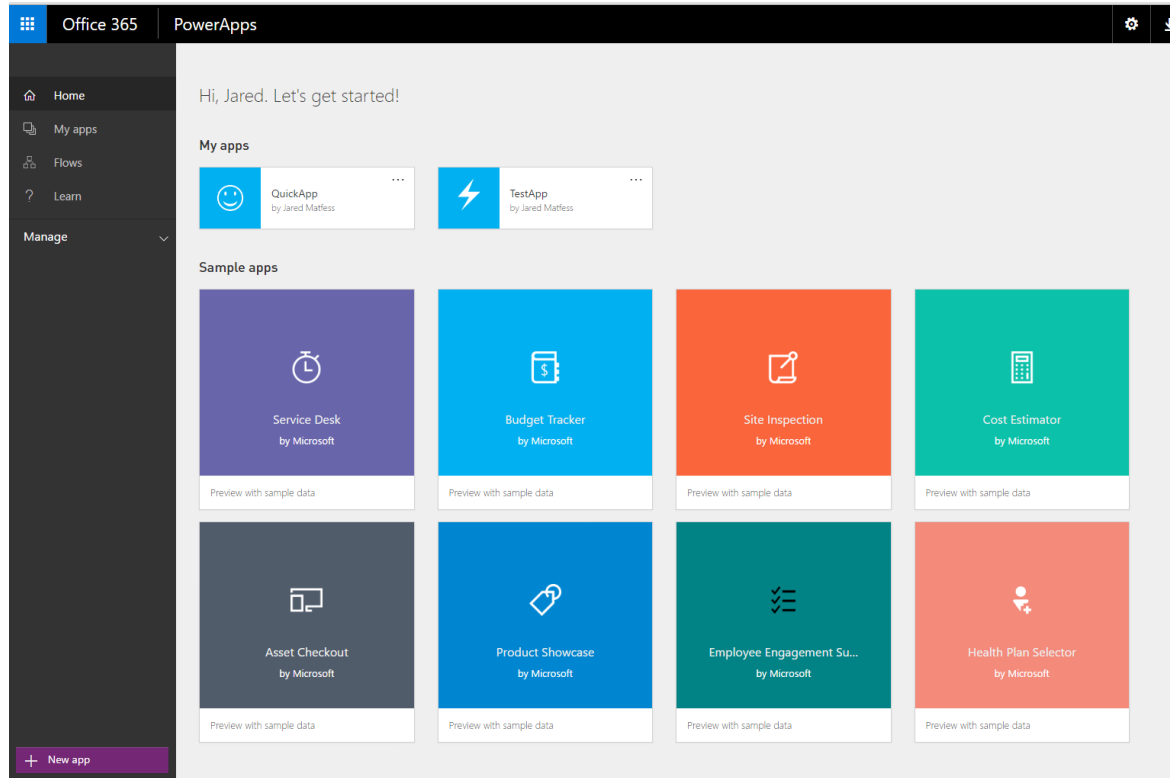
Over 70 out of the box connectors with new connectors every week

Use Custom APIs to connect to any custom REST endpoint

Connect to on-premises data using gateways

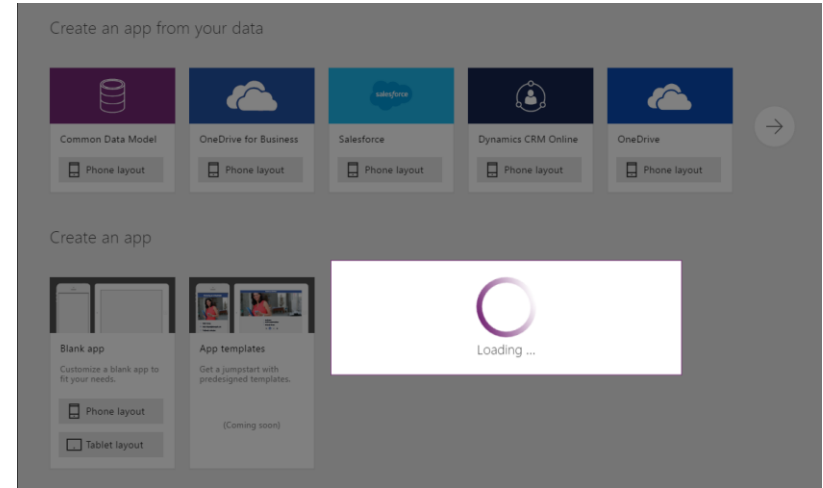


Part of O365 App Launcher

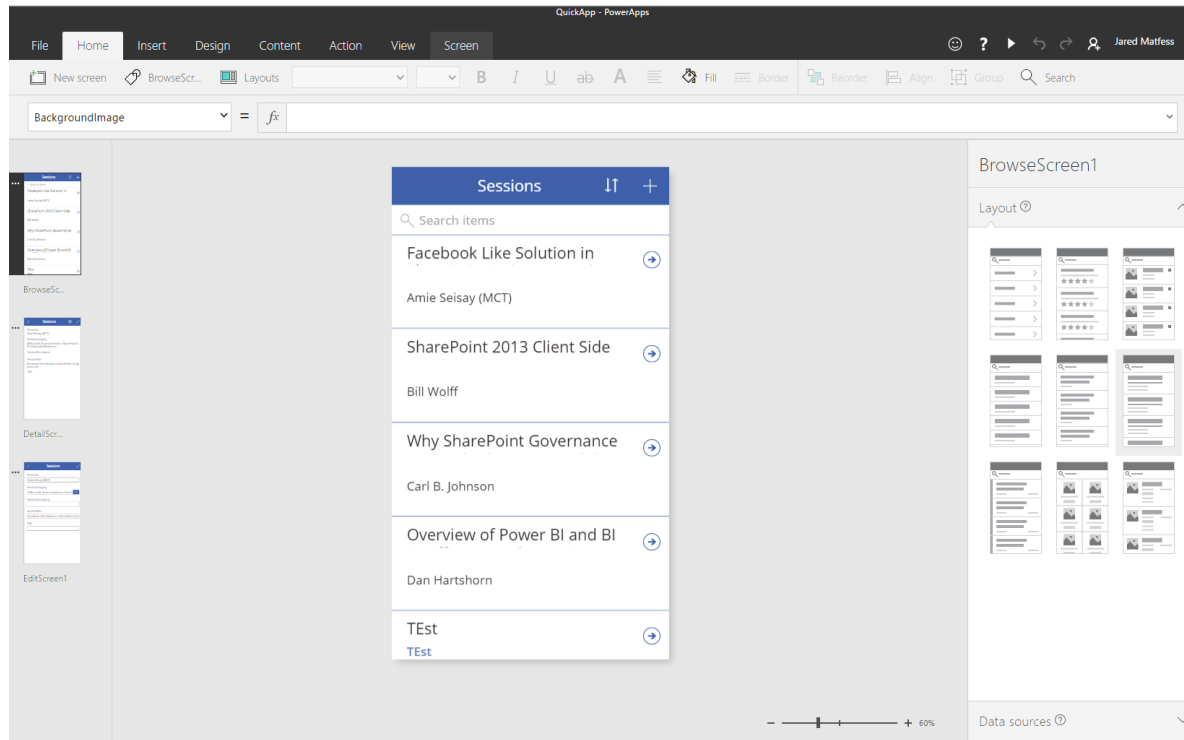


Development Options

- Build Apps in the Browser (a little buggy)
- Build Apps in Windows App (a little buggy)



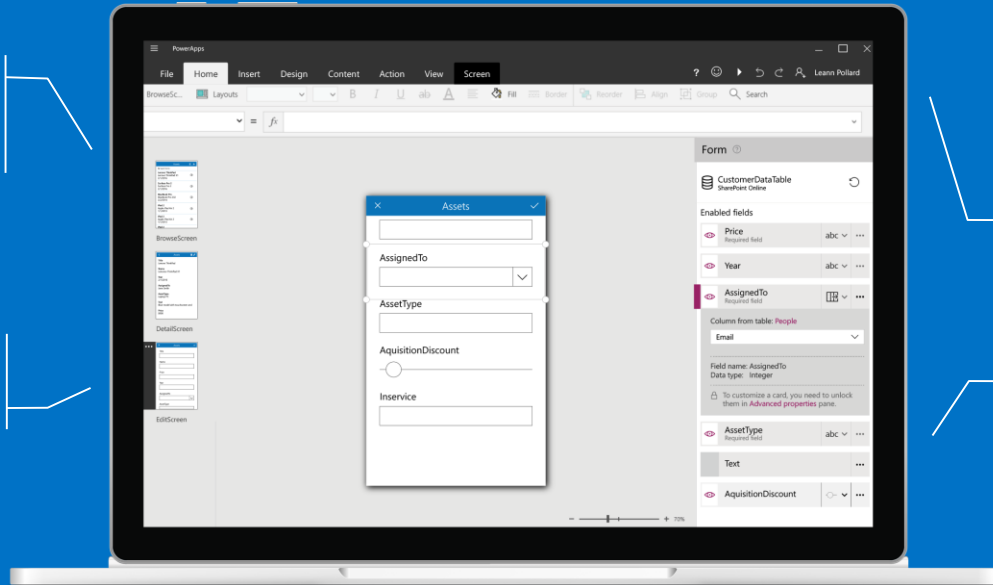
PowerApps Authoring



Build useful apps without writing code

Craft forms and screens in a visual designer that helps you see exactly what you'll get

Take advantage of device capabilities like cameras, GPS, and pen controls

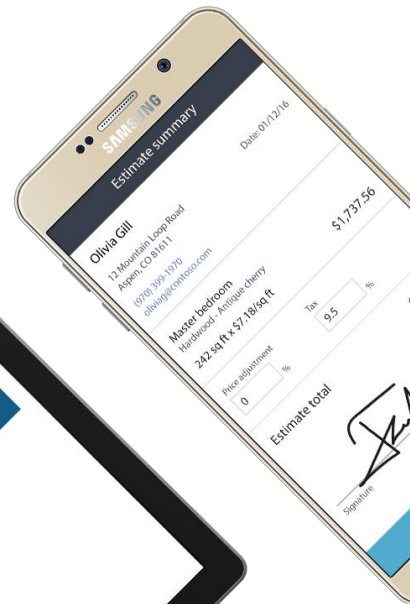
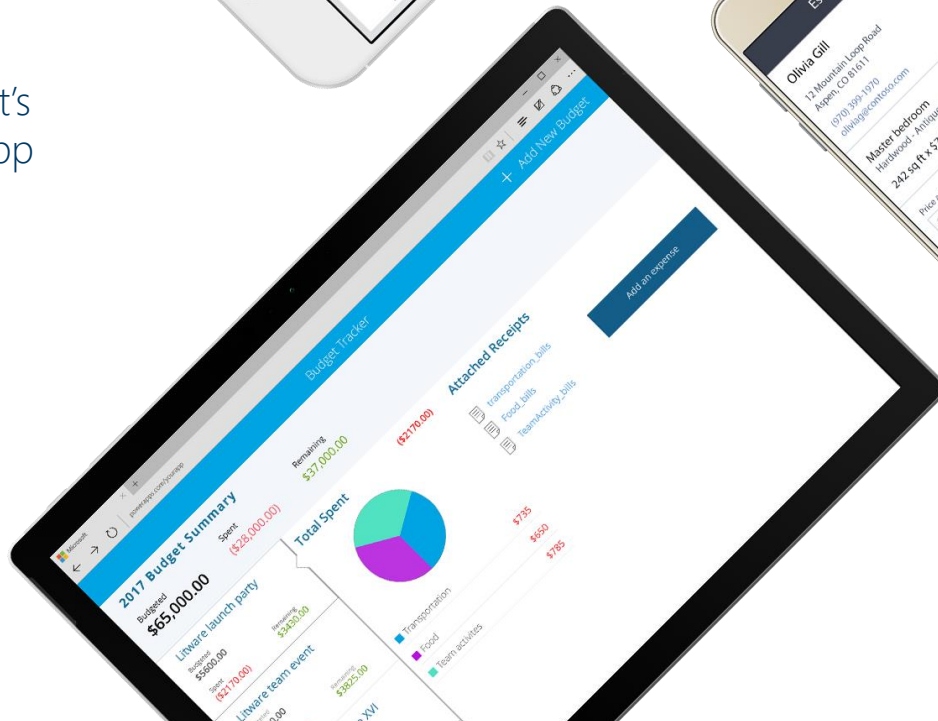
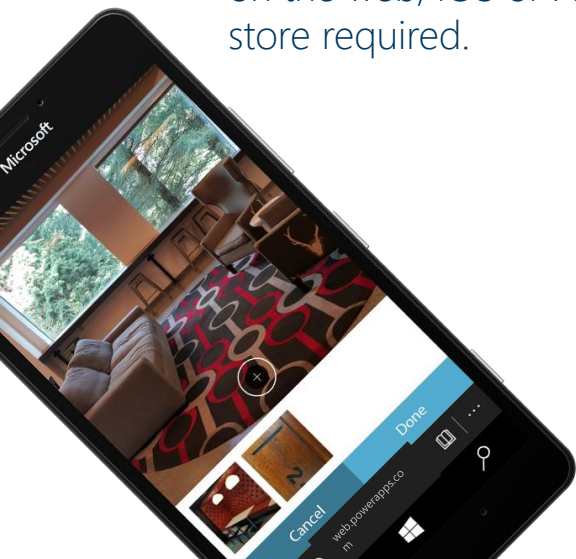


Build business logic into your apps with an Excel-inspired expression language

Extend the capabilities of connected data sources, or focus just on the bits you need

Publish apps instantly for web and mobile

Get apps to your team when and where they're needed, whether that's on the web, iOS or Android—no app store required.



On-premises data gateway

One gateway for multiple cloud services and experiences

Cloud services



Gateway Cloud Service

Data source connection credentials are encrypted



Azure Service Bus



Application Gateway

Data source connection credentials can only be decrypted by the gateway

On-premises data sources



SQL Server



SQL Server Analysis Services

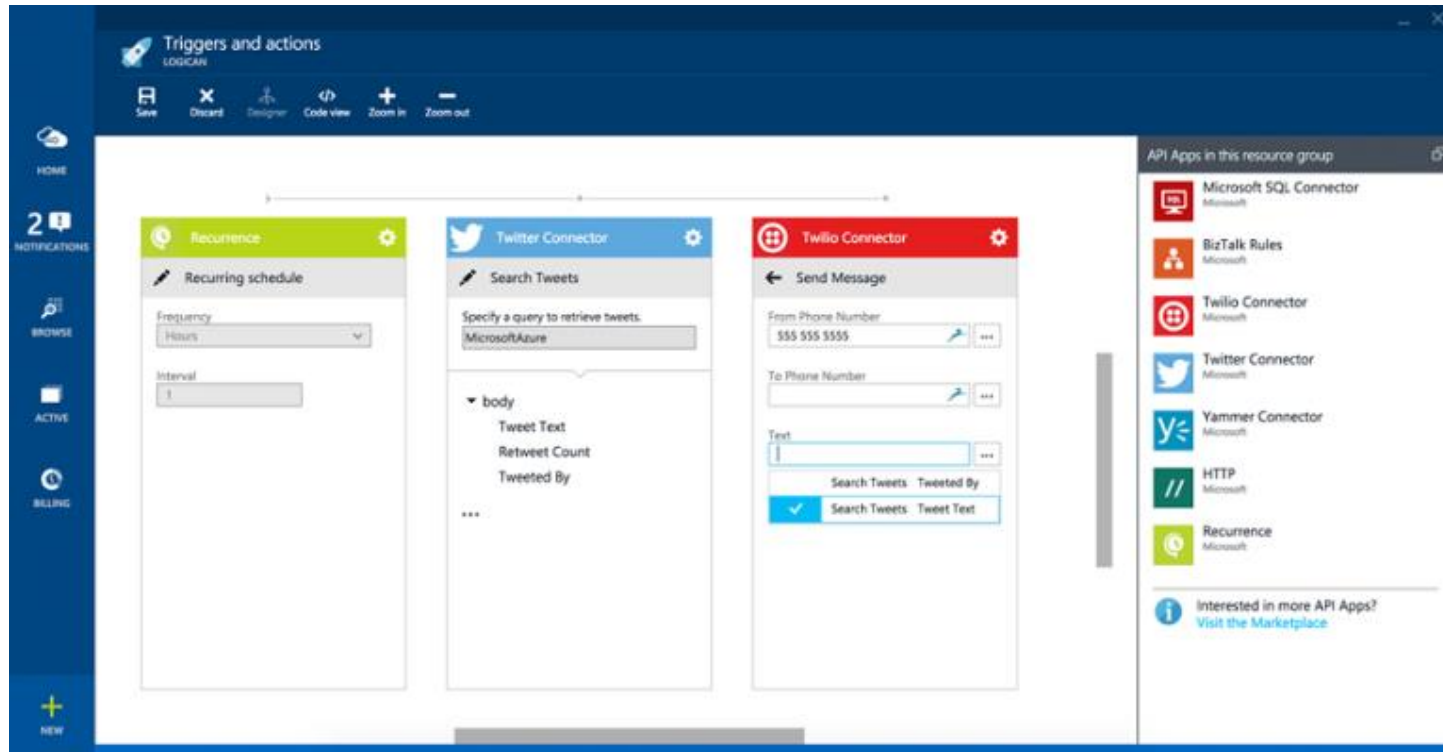


Other data sources



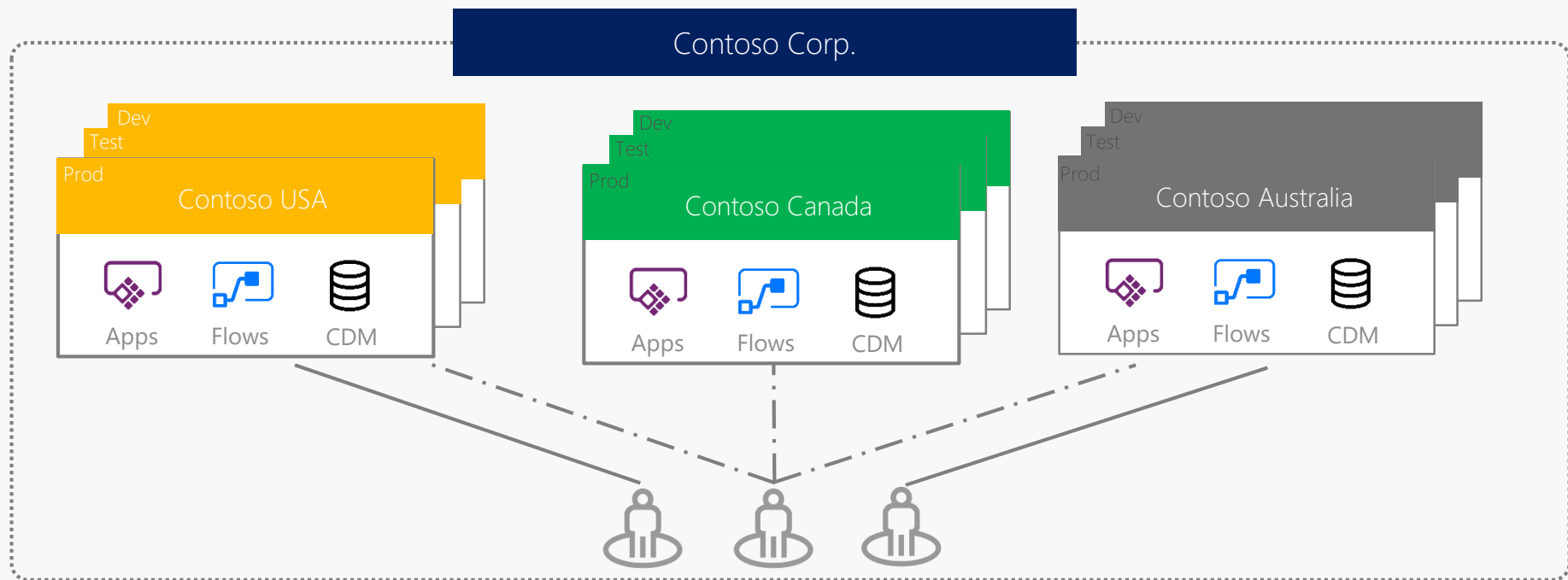
Files, SharePoint

What about Azure Logic Apps?



Deployment environments

Easily manage enterprise scale-out of applications and data.
Move solutions across environments with packages.



Admin center

Environment administration

Lifecycle and management for all resources

Manages roles and role membership

List and monitor list of all resources in a given environment (*)

Data Loss Protection

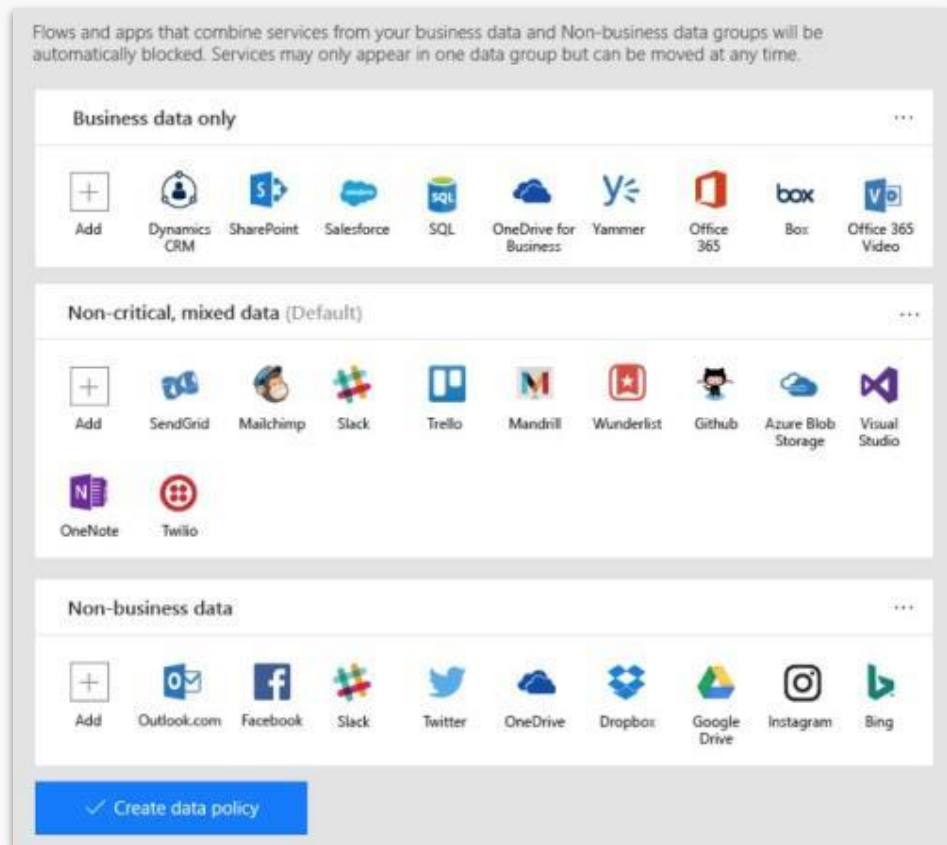
Provide IT-administrators with full control of how data flows within an organization

Set policies for classification of services

Local agility, central control

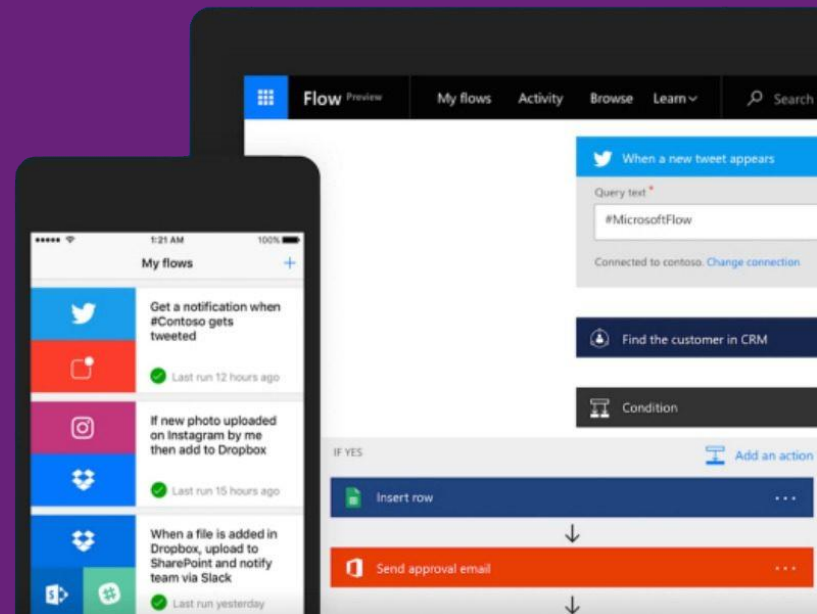
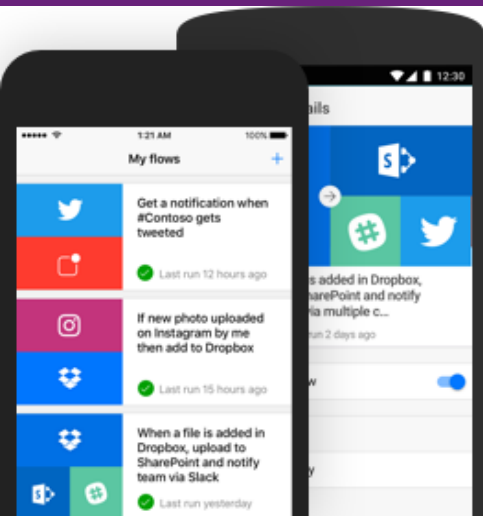
Allow developers/teams control over their environment and still have centralized control

(*) Capabilities planned for Post GA release





Microsoft Flow



Gartner®

"By **2017**, in large organizations, at least **65%** of new integration flows will be developed outside the control of IT departments."

"By **2018**, in most organizations, at least **50%** of new integration flows will be implemented by citizen integrators."

"By **2020**, **75%** of businesses will become or prepare to become a digital business."

2016

2017

2018

2019

2020



Manual Tasks



Microsoft Flow helps non-developers work smarter by automating workflows across apps and services



Get notifications



Synchronize files



Collect data



Automate approvals

Templates help users to get started



Create a flow from blank



Copy Dynamics CRM Accounts to Common Data Service customer organizations

By Microsoft
Used 227 times



Copy Dynamics CRM Accounts to customers in Dynamics 365 for Operations

By Microsoft
Used 197 times



When an object is created in Dynamics CRM, create a list item

By Microsoft
Used 194 times



Create Dynamics Leads based on Tweets with a button tap

By Microsoft
Used 31 times



Add a Dynamics Case after email approval

By Microsoft
Used 31 times



Copy new Dynamics CRM Cases to the Common Data Service

By Microsoft
Used 26 times



Create a Wunderlist Task for New CRM Leads

By James Turner
Used 26 times



When a new opportunity is created post to Yammer

By Richard Bosse
Used 133 times



Create Dynamics CRM Leads from an Excel table

By Microsoft
Used 121 times



Create Dynamics Leads based on Tweets

By Microsoft
Used 118 times



Create a new record in Dynamics CRM when a new list item is added

By Microsoft
Used 95 times



Send an mail from your SMTP server on new opportunities

By Kerem Eser
Used 26 times



Copy new Dynamics CRM Leads to the Common Data Service

By Microsoft
Used 25 times



Attach OneDrive files about Dynamics Contacts as notes

By Microsoft



Create CRM Account for new Azure Queue Messages

By Marius Pedersen



Copy new Dynamics CRM Contacts to the Common Data Service

By Microsoft
Used 91 times



Create a SharePoint item based on a Dynamics CRM record

By Henry Scheinin
Used 79 times



Create Dynamics notes for Emails

By Microsoft
Used 61 times



Move rows from and Excel table to Dynamics AX Online Vendors

By Microsoft
Used 56 times



Send a Push Notification for new Sales Orders

By Isaac Dorgbefe



Copy Teams from the Common Data Service to Operations Customer Groups

By Michael Berroth



Copy Salesforce Accounts to Dynamics AX Online Customers

By Microsoft



When a new lead is created in Dynamics CRM, add it to a Smartsheet

By Microsoft



Copy from Dynamics CRM to the Common Data Service and Operations



CRM Opportunity Win to Create a New Project



Create Dynamics CRM Leads from a Google Sheet



On approval create a Dynamics CRM entity for items in a SharePoint list



Create a case in Dynamics from Freshdesk



Low stock warning



Social Media Promotions



Add notes to a Dynamics CRM contact

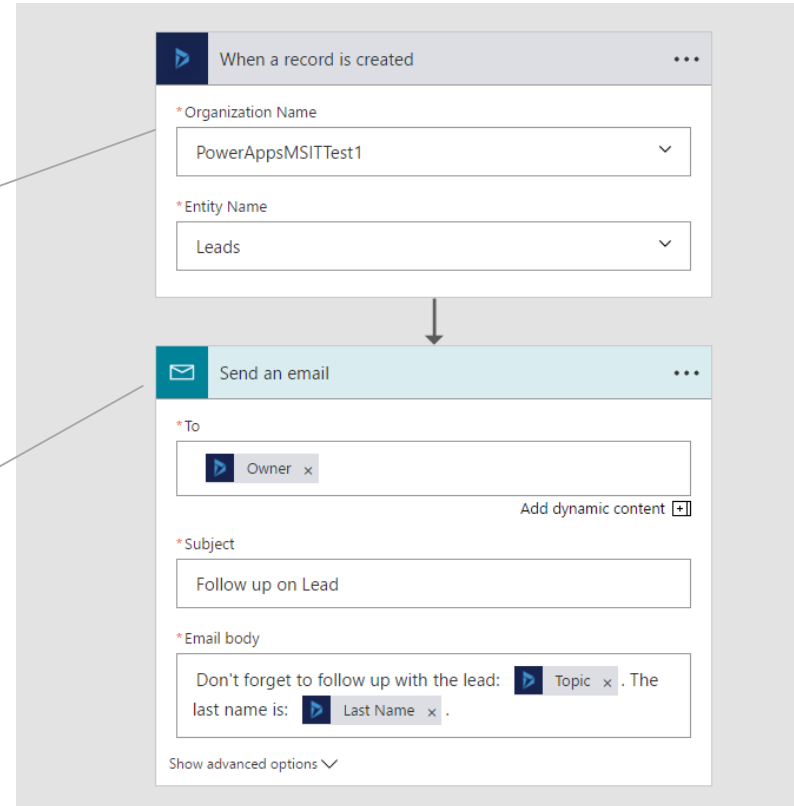


What makes up a Flow?

Example: Notification Flow

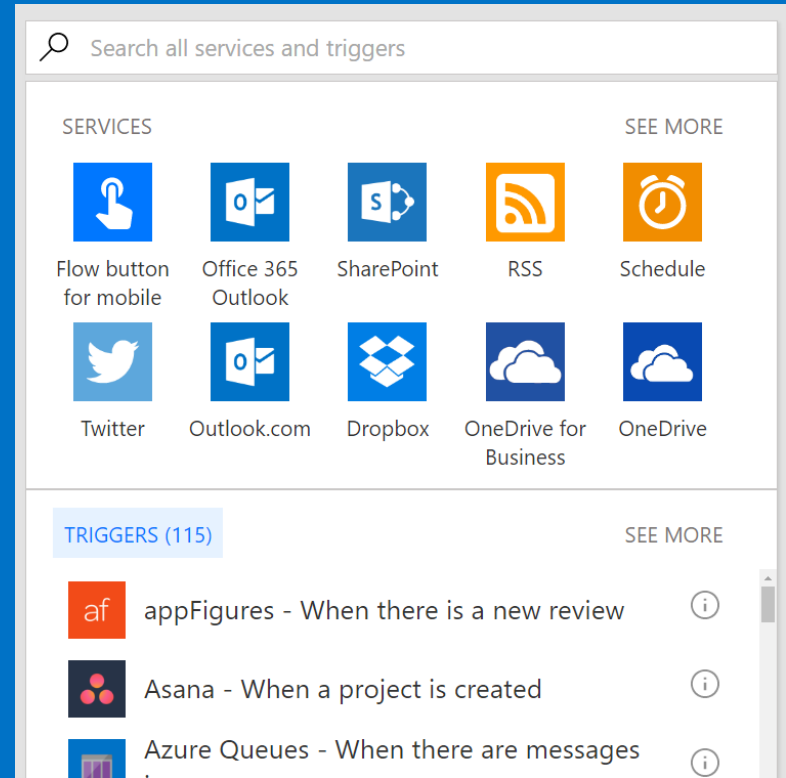
Trigger – the event that kicks off the flow

Actions – what the flow does
Uses data from the trigger



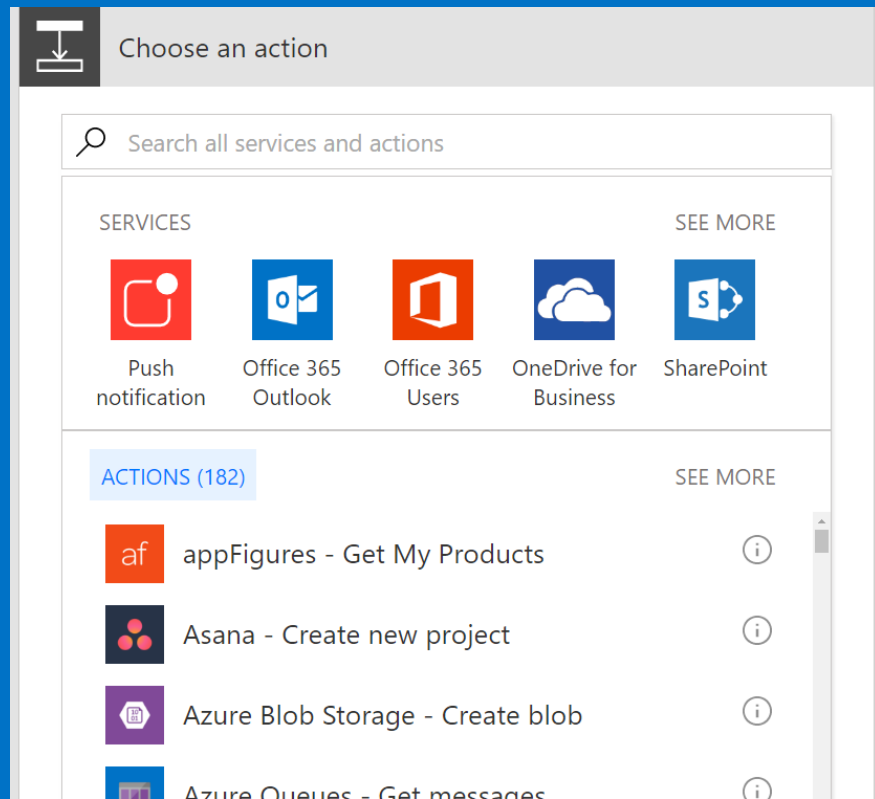
Triggers

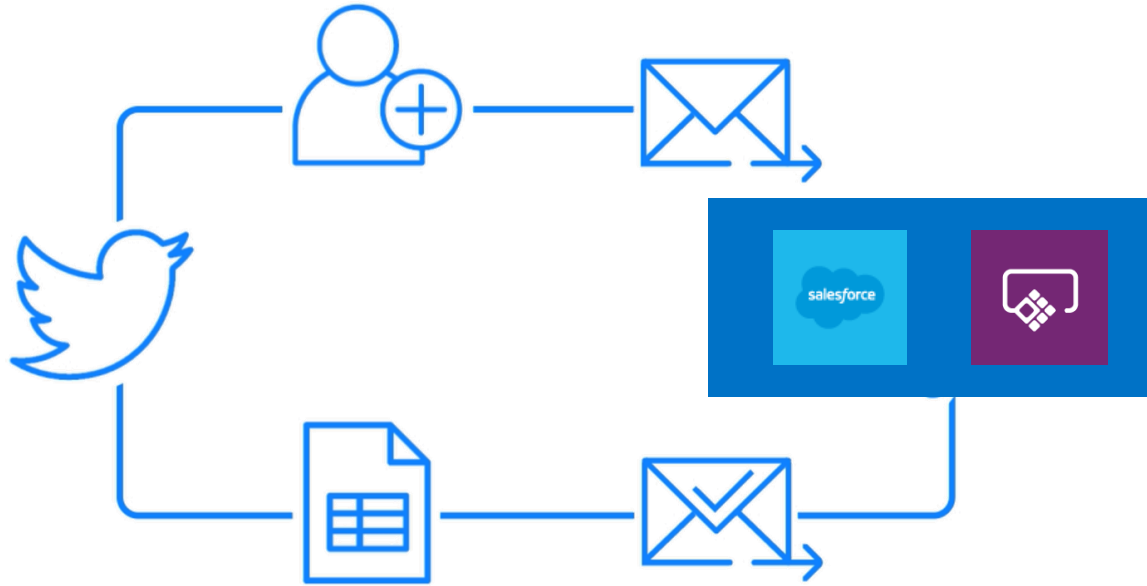
- Run manually based on user action
 - From Flow button
 - From PowerApps
- Run on a schedule
- Run based on an event that happens in the cloud



Actions

- Connect to any cloud service
- Use the data from the trigger
- Connect even to simple HTTP endpoints if we don't have out-of-box support



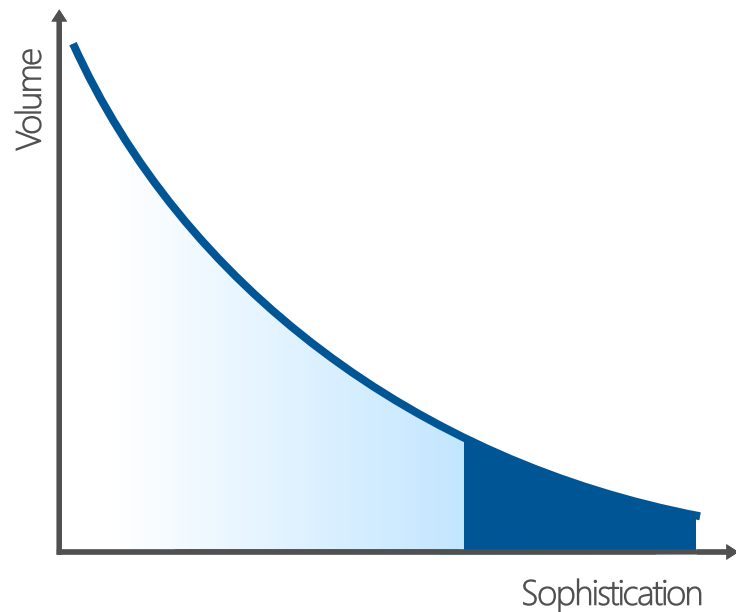


Automate advanced scenarios with multiple steps,
branching conditions, and more

Who is the audience for Flow?

Flow focus:
Power Users & Specialists

Logic apps focus:
IT Pro / Developers



Value Proposition for Microsoft Flow

- Salesforce.com subscription licenses are expensive
- Most organizations only purchase subscription for sales personnel
- Supporting business functions & personnel can help to add values to sales cycle while not having to incur the additional expense
- Flow will bridge the gap between consumer systems, other cloud services, etc.

Example: Conference

- Slalom Atlanta sponsors a booth at SharePoint Saturday event
- Lots of interesting conversations with potential recruits
- Team captures a few potential consulting leads but nobody has access to CRM!

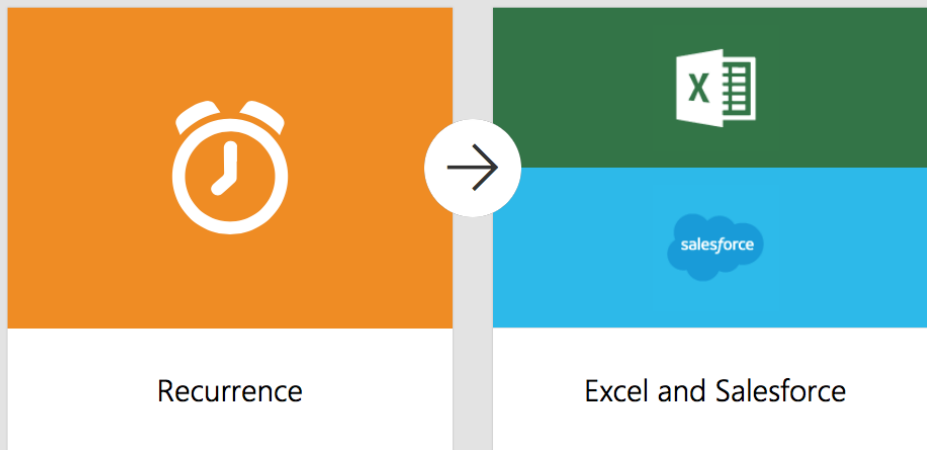


What would you do?



Flow it!

Create Salesforce Leads from a Excel table



It's now very easy to create Salesforce leads. Whenever you add a new row to the Excel Table you select, a lead will be created in Salesforce (and cleaned up from the Table). You need to select a sheet that has columns for: First Name, Last Name, Company, Phone and Email.

Limits are awesome

Company Information

Slalom

[Help for this Page](#) ?

The organization's profile is below.

[User Licenses \[10+\]](#) | [Permission Set Licenses \[5\]](#) | [Feature Licenses \[13\]](#) | [Usage-based Entitlements \(BETA\) \[0\]](#)

Organization Detail

Edit

Organization Name	Slalom	Phone	
Primary Contact	Jared Mattess	Fax	
Division		Default Locale	English (United States)
Address		Default Language	English
	US		
Fiscal Year Starts In	January	Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Allow Support to Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD
Newsletter	<input checked="" type="checkbox"/>	Used Data Space	310 KB (6%) [View]
Admin Newsletter	<input checked="" type="checkbox"/>	Used File Space	767 KB (4%) [View]
Hide Notices About System Maintenance	<input type="checkbox"/>	API Requests, Last 24 Hours	15,025 (15,000 max)
Hide Notices About System Downtime	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)
		Restricted Logins, Current Month	0 (0 max)
		Salesforce.com Organization ID	00D61000000es74
		Organization Edition	Developer Edition
Created By	Jared Mattess , 11/12/2015 10:05 AM		
		Modified By	Jared Mattess , 5/20/2016 7:28 AM

Edit

Flow, PowerApps, & Governance

- Companies definitely need to identify “who” will build these solutions
- The ease of development does not negate the need to have data discussions
- Be aware of API limitations on target systems (Salesforce.com) is a great example
- Consider developing “naming conventions” for Flows (Logic Apps)



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