

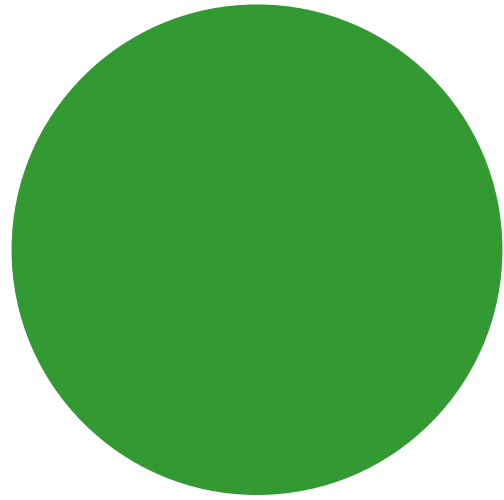
Tips and Tricks To Get The Most Out of Boomi Flow

Agenda

Tips and tricks, thick and fast...

Who am I?

Not a programmer...



Beginner Tips

Containers





+ Contact Info

- Shipping Address

Shipping Name

Shipping Phone

Shipping Address

Shipping Zip

Shipping Comments

Next

Content



Input



Data



Charts



Feature 2 Container

Mobile Sample Request [Field Work]

F2 Summary

presentation: F2 Summary

A mobile-oriented flow through which field agents can request a commercial beverage sample and receive SMS approvals.

Highlights:

- Field Work
- Approvals

outcomes: Launch Bev Req Outcome

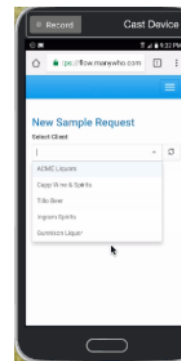
Outcome 1 Outcome 2 Outcome 3

F2 Tabs

F2 Clip

Clip

presentation: F2 Clip



F2 Detail

Detail

presentation: F2 Detail

BoomiCRM Project Dashboard

Opportunities

Implementations

Pending Implementations

All Opportunities

Closed/Won Opportunities (Ready to initiate implementation process)



Actions	ID	Name	Account	Owner	Description	Stage	Campaign	Close Date
Launch	24	Cassidy Inc. 15 Widgets	Cassidy Inc.	Chris Cappetta	Cassidy Inc is looking for 15 widgets within a short timeframe	Closed/Won	7	04/02/2018
Launch	2	ACME 100 Units	ACME	Andy Tillo	ACME is seeking 2 units, ASAP!	Closed/Won	7	03/22/2018
Launch	25	VMWare 10 Widgets	VMWare	Andy Tillo	VMWare is seeking 100 widgets, their plan is to spend during this fiscal year, which ends in November.	Closed/Won	5	03/20/2018
Launch	1	CappCorp 100 Widgets	CappCorp	Andy Tillo	VMWare is seeking 100 widgets, their plan is to spend during this fiscal year, which ends in November.	Closed/Won	5	03/20/2018



BoomiCRM Project Dashboard

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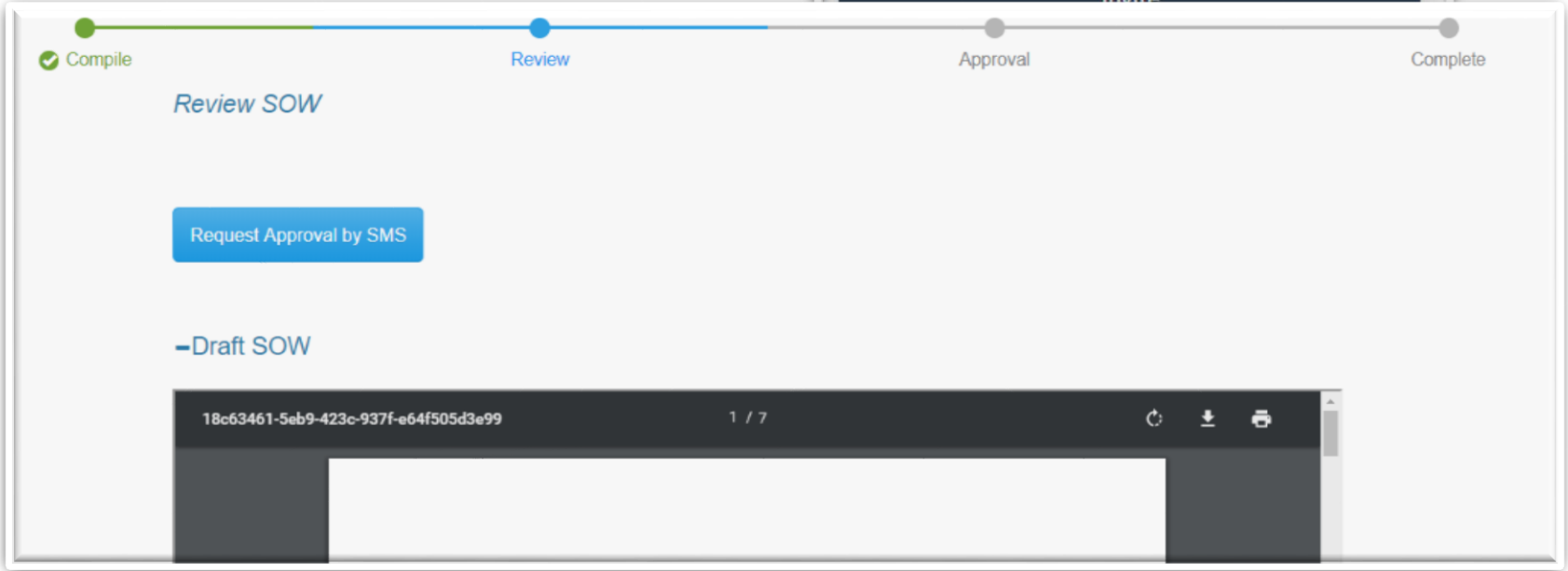
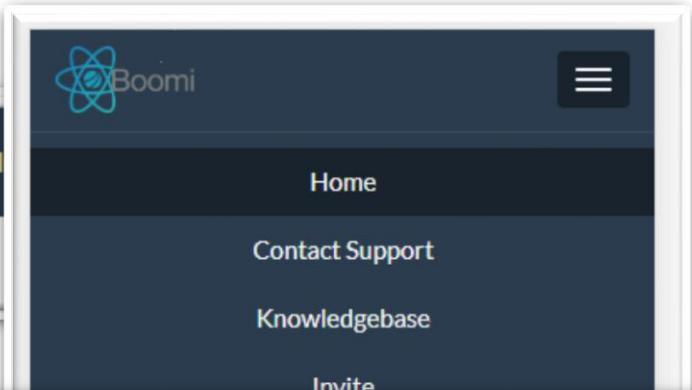
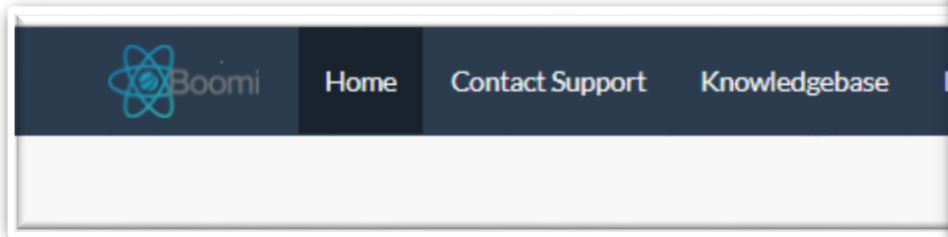
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Navigation







Flow Demos

+Mobile Sample Request [Field Work]

+Create Statement Of Work [Document Generation]

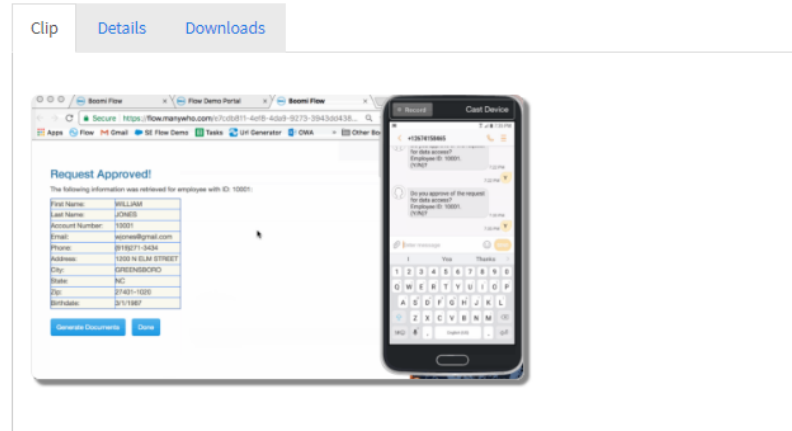
-Patient API [SMS Approval]

A flow built on top of the Atomsphere Patient API demo. Data is retrieved from an Azure database by record-ID and can be auto-populated into a document-generation mechanism.

Highlights:

- Approvals
- Extending Existing Atomsphere Processes
- Document Generation

+ Retrieve Approved Data App



+Process Dashboard [Insights]

+Customer Implementation Flow [Onboarding]

+Report Injury Mobile App [Self-Service Mobile App]



Intermediate Tips

Services

Flow & AtomSphere

*Connect your humans
With business technology
And deliver more*

Flow & Salesforce

- ✓ Build Workflow and Applications for Salesforce, and everywhere else
- ✓ Create workflows quickly, without coding
- ✓ Deliver more value from your Salesforce investment

Useful Service URLs

AtomSphere:

<Atom Base Url><Flow Service Path>

E.g: <https://connect.boomi.com/fs/ediflow>

Boomi Flow Identity Service

Rudimentary runtime user credential management, leveraging an auto-created database behind your tenant. Contact Boomi for setup details.

<https://services.manywho.com/api/identity/1>

SQL Service

Detail: <https://github.com/manywho/service-sql/wiki/Configuration>

<https://services.manywho.com/api/sql/2>

Email Service

Detail: <https://github.com/manywho/service-email/wiki/Configuration>

<https://services.manywho.com/api/email/1>

Runtime Service

An internal Flow service to launch and listen to parallel processes.

<https://flow.manywho.com/plugins/manywho/api/run/1>

Timer Service

<https://services.manywho.com/api/timer/1>

Salesforce Service

<https://salesforce.manywho.com/plugins/api/salesforce/1>

Sharepoint Service

<https://services.manywho.com/api/sharepoint/1>

Twilio Service

<https://services.manywho.com/api/twilio/2>

OKTA Service

<https://services.manywho.com/api/okta/1>

Useful Services in Open UAT (Staging)

Box Service - <https://services-staging.manywho.com/api/box/3>

S3 Service - <https://services-staging.manywho.com/api/aws/s3/1>

PDF Service - <https://services-staging.manywho.com/api/pdf/1>

Player Customization

What is a player?

A player is neat.

It renders your flow when launched.

Customize it. A lot.

Traditional Web Site Request

User wants to view wikipedia... they request it via URL in a web browser

Wikipedia sends back a full website of specific functionality and pre-defined user interface.

**User
browses
Wikipedia**

Boomi Flow Web App Request

User wants to interact with a Boomi Flow application. They request it via url (like Wikipedia), OR by message, OR as an embedded part of another tool.

The Flow's features, logic, and functions are 'described' by the flow diagram. A 'player' is able to render and alter that application dynamically at runtime.

User engages with an application specifically tailored to their requirements and role. Wherever it's most useful.

Out-of-box Themes

Bootstrap Themes

Light themes

Paper (Default)

Cosmo

Flatly

Journal

Lumen

Sandstone

Simplex

Spacelab

United

Yeti

Readable

Dark themes

Cyborg

Darkly

Slate

Superhero

The bold themes are my favorite

View many of these here:

<https://bootswatch.com/>

Navigation Customizations

Wizard Navigation

✓ Compile Review Approval Complete

Review SOW

Request Approval by SMS

-Draft SOW

18c63461-5eb9-423c-937f-e64f505d3e99 1 / 7 ↻ ↓ 🖨

default



Save

Delete

New

Select a flow to preview

Preview

Services

Types

Assets

Tenant

Tools

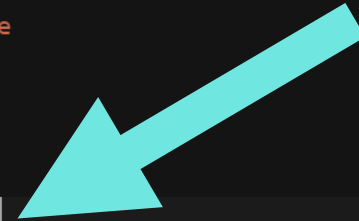
API

Import / Export

Players

Macros

```
129         sessionId: queryParameters['session-token'],
130         sessionUrl: queryParameters['session-url']
131     },
132     navigationElementId: queryParameters['navigation-element-id'],
133     mode: queryParameters['mode'],
134     reportingMode: queryParameters['reporting-mode'],
135     replaceUrl: true,
136     collaboration: {
137         isEnabled: false
138     },
139     inputs: null,
140     annotations: null,
141     navigation: {
142         isFixed: true,
143         isWizard: false
144     },
145     callbacks: [],
146     theme: queryParameters['theme']
147 };
148
149 var tenantId = queryParameters['tenant-id'];
150 if (!tenantId) {
151     tenantId = window.location.pathname
152         .split('/')
153         .filter(function (path) {
154             return path && path.length > 0;
155         })[0];
156
157
```



default



Save

Delete

New

Select a flow to preview

Preview

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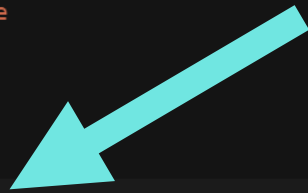
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131     },
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133     mode: queryParameters['mode'],
134     reportingMode: queryParameters['reporting-mode'],
135     replaceUrl: true,
136     collaboration: {
137         isEnabled: false
138     },
139     inputs: null,
140     annotations: null,
141     navigation: {
142         isFixed: true,
143         isWizard: true
144     },
145     callbacks: [],
146     theme: queryParameters['theme']
147 };
148
149 var tenantId = queryParameters['tenant-id'];
150 if (!tenantId) {
151     tenantId = window.location.pathname
152                 .split('/')
153                 .filter(function (path) {
154                     return path && path.length > 0;
155                 })[0];
156
157
```





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+ Mobile Sample Request [Field Work]

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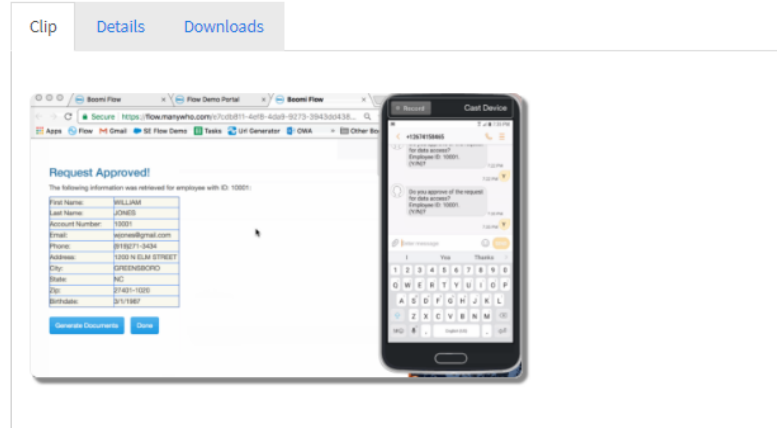
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+ Customer Implementation Flow [Onboarding]

+ Report Injury Mobile App [Self-Service Mobile App]

Boomi Flow

Home Demo Portal

portal Save Delete New

Select a flow to preview

```
250
251
252 <script src="https://assets.manywho.com/js/loader.min.js"></script>
253
254 <style>
255
256 /* Custom Styles (Dell Colors) */
257 .mw-bs .main-container-inner>.navbar {
258   background:#007db8;
259   border:0px;
260   box-shadow: 0px 0px 20px #ffffff;
261   background: linear-gradient(to right, #007db8 , #006a9c);
262 }
263
264 .mw-bs .main-scroller{
265   background: linear-gradient(to bottom right, #dcdcdc, #c5c5c5);
266 }
267
268 .mw-bs .main-scroller .container {
269   background: #fff;
270   box-shadow: 0px 0px 15px #888888;
271 }
272
273 .mw-bs .navbar-brand{
274   background: url(data:image/png;base64,iVBORw0KGgoAAAANSUuEugAAABgAAAAAYCAAAADgdz34AAAAAGXRFHHRtb2Z0d2FyZQ0BBZG9iZSBJbWFnZVJ1YWR5c11PAAAAyFpVFh0WE1MOmNvb
275   background-position: left center;
276   background-repeat: no-repeat;
277   font-size: 16px;
278   font-weight: 500;
279   line-height: 50px;
280   margin: 0 15px 0 15px !important;
281   padding: 0px 0px 5px 34px !important;
282   font-weight: bold;
283 }
284
285
286 .mw-bs .navbar-default .navbar-nav > li > a{
287   background: #0388c7;
288   border-bottom: 1px solid #0077af;
289   transition: all .2s ease-in-out;
290 }
291
292 .mw-bs .navbar-default .navbar-nav > li > a:focus, .mw-bs .navbar-default .navbar-nav > li > a:hover {
293   color: #fff;
294   background-color: #015f8c;
295 }
296
297 .mw-bs .navbar-default .navbar-nav > .active > a, .mw-bs .navbar-default .navbar-nav > .active > a:focus, .mw-bs .navbar-default .navbar-nav > .active > a:
298   color: #fff;
299   background-color: #0b73a5;
300 }
301
302 .mw-bs .navbar-default .navbar-nav > .open > a, .mw-bs .navbar-default .navbar-nav > .open > a:focus, .mw-bs .navbar-default .navbar-nav > .open > a:ho
303   background-color: #015f8c;
304 }
305
306
```

Tools

- API
- Import / Export
- Players
- Macros
- Metrics
- Dashboard

Help

- Docs
- Support
- Sign Out

Platform and Status Announcements

Use this player

<https://github.com/boomiflow-community/player-left-nav-demo-portal>

Bonus: My default player

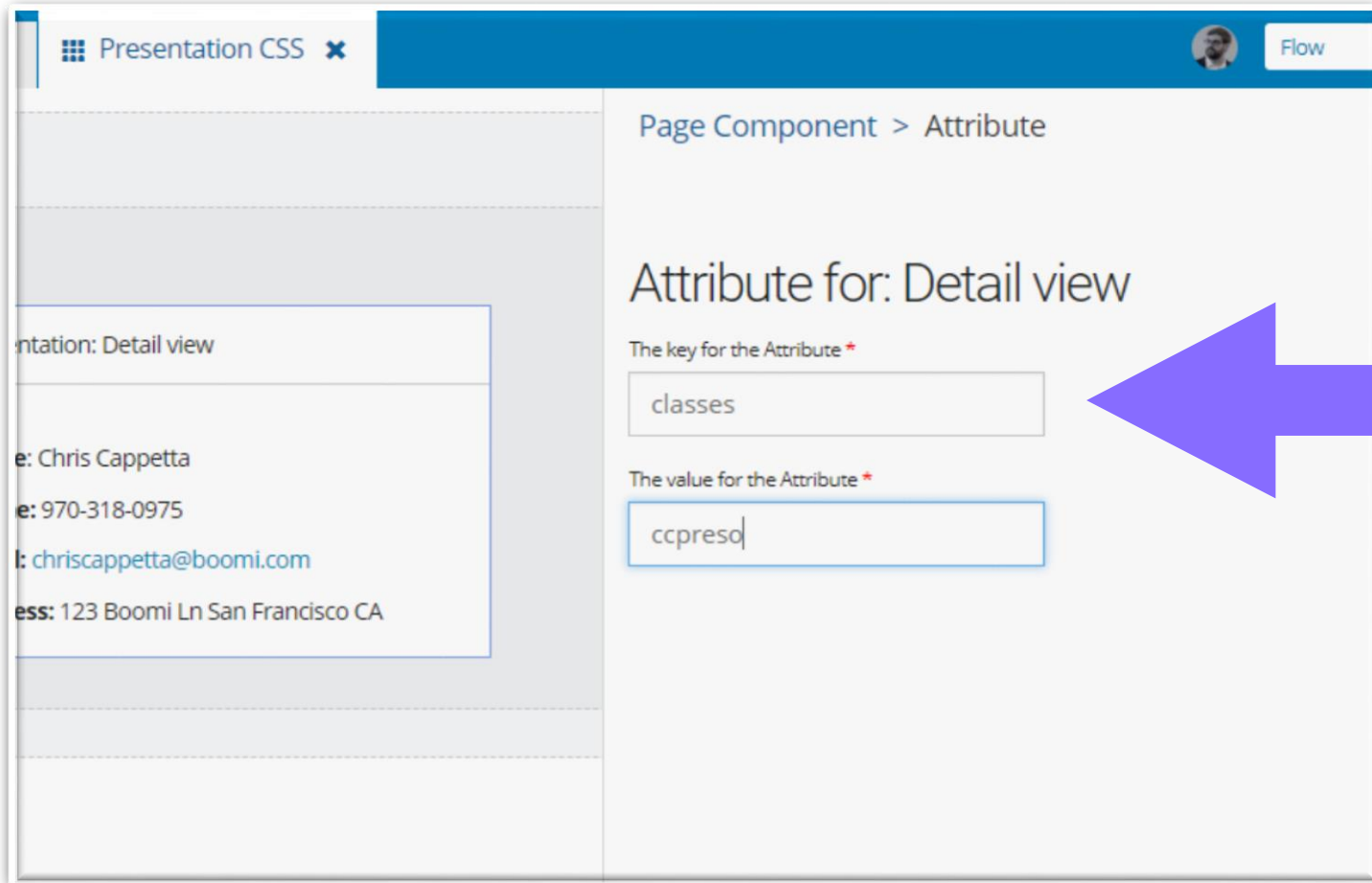
<https://github.com/boomiflow-community/player-cappetta-default>

Custom CSS

Giving The Component A Class

The screenshot shows the Boomi Flow interface with a component editor. The main container is titled 'Main container' and contains a 'header container' with two components: 'presentation: Logo' and 'presentation: Detail view'. The 'presentation: Detail view' component is selected, and its properties are displayed in a tooltip: Name: Chris Cappetta, Phone: 970-318-0975, Email: chris cappetta@boomi.com, and Address: 123 Boomi Ln San Francisco CA. The right sidebar shows the component's configuration options, including 'Page Component', 'State', 'Data Presentation', 'Help', and 'Attributes'. A green '+ New Attribute' button is located at the bottom of the 'Attributes' section, and a large purple arrow points to it. The bottom of the interface has 'Don't Save' and 'Save Component' buttons.


Giving The Component A Class



The screenshot shows the Boomi Presentation CSS editor interface. On the left, a preview pane displays a contact card with the following information: "Presentation: Detail view", "Name: Chris Cappetta", "Phone: 970-318-0975", "Email: chris cappetta@boomi.com", and "Address: 123 Boomi Ln San Francisco CA". On the right, the configuration pane is titled "Page Component > Attribute" and "Attribute for: Detail view". It contains two input fields: "The key for the Attribute" with the value "classes" and "The value for the Attribute" with the value "ccpresd". A large purple arrow points from the right towards the "classes" input field.

Note:
classes
(is plural)

Adding Style To The Player



```
158     manywho.engine.initialize(  
159         tenantId,  
160         queryParameters['flow-id'],  
161         queryParameters['flow-version-id'],  
162         'main',  
163         queryParameters['join'],  
164         queryParameters['authorization'],  
165         options,  
166         queryParameters['initialization']  
167     );  
168     }  
169 }  
170 };  
171 </script>  
172  
173 <script src="https://assets.manywho.com/js/loader.min.js"></script>  
174 <style>  
175     .mw-bs .ccpreso {  
176         border: 1px solid grey;  
177         border-radius: 3px;  
178         background: #dcdcdc;  
179     }  
180 </style>  
181 </body>  
182 </html>  
183
```

Platform and Status Announcements © Copyright 2018 Boomi, inc.

Assets

Tenant

Tools

API

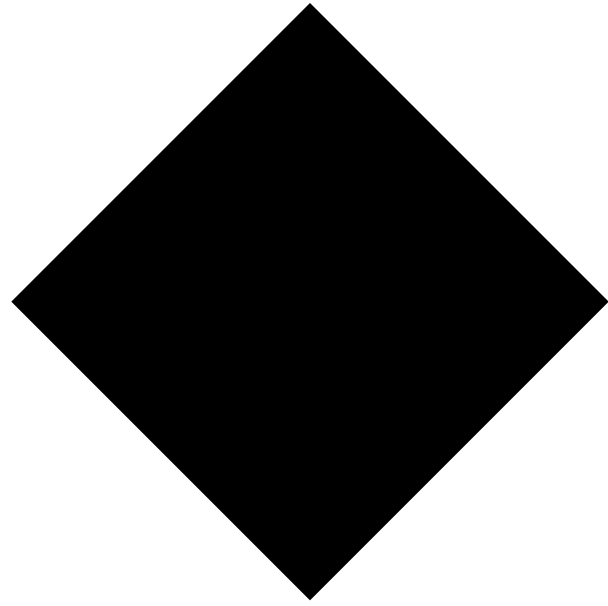
Import / Export

Players

Macros

Metrics

```
158     manywho.engine.initialize(  
159         tenantId,  
160         queryParameters['flow-id'],  
161         queryParameters['flow-version-id'],  
162         'main',  
163         queryParameters['join'],  
164         queryParameters['authorization'],  
165         options,  
166         queryParameters['initialization']  
167     );  
168     }  
169 }  
170 };  
171 </script>  
172  
173 <script src="https://assets.manywho.com/js/loader.min.js"></script>  
174 <style>  
175     .mw-bs .ccpreso {  
176         border: 1px solid grey;  
177         border-radius: 3px;  
178         background: #dcdcdc;  
179     }  
180 </style>  
181 </body>  
182 </html>  
183
```



Advanced Tips

Custom react.js components

*Extend your flows with,
Industry standard web skills.
Build your wildest dreams.*

Q&A



Boomi