Seamless Screen Flow Transition: Boosting Efficiency & Reducing Costs for EDF

Environmental Defense Fund

INDUSTRY

Environmental Advocacy

LOCATIONS

New York City, New York

URL

www.edf.org

Company Overview

Environmental Defense Fund or EDF is a United States–based nonprofit environmental advocacy group. The group is known for its work on issues including global warming, ecosystem restoration, oceans, and human health, and advocates using sound science, economics, and law to find environmental solutions that work. Founded in 1967, EDF drives environmental breakthroughs in climate and energy, ecosystems, oceans, and health through a unique approach that draws heavily on science, economics, and bipartisan outreach.

Business Challenge:

EDF's Fellowship Portal, initially built using VF Page Sites and later enhanced with custom Lightning Web Components (LWCs), serves as the central platform for fellow placement. Key components of the portal include: a registration feature for users to begin their application process; a Home component that provides logged-in applicants access to review actions, next steps, and manage personal information; a comprehensive 7-page application form covering personal, educational, and regional preference details; a Host Organization section that allows applicants to explore various host engagements, company types, work expectations, and outcomes; and a project tracking feature for fellows to monitor deliverables and engagement once aligned with a host. As EDF's internal Salesforce team has grown in Salesforce Flow expertise, they aim to shift more functionality from custom LWCs to Flow, reducing reliance on external teams and enabling more agile internal enhancements.

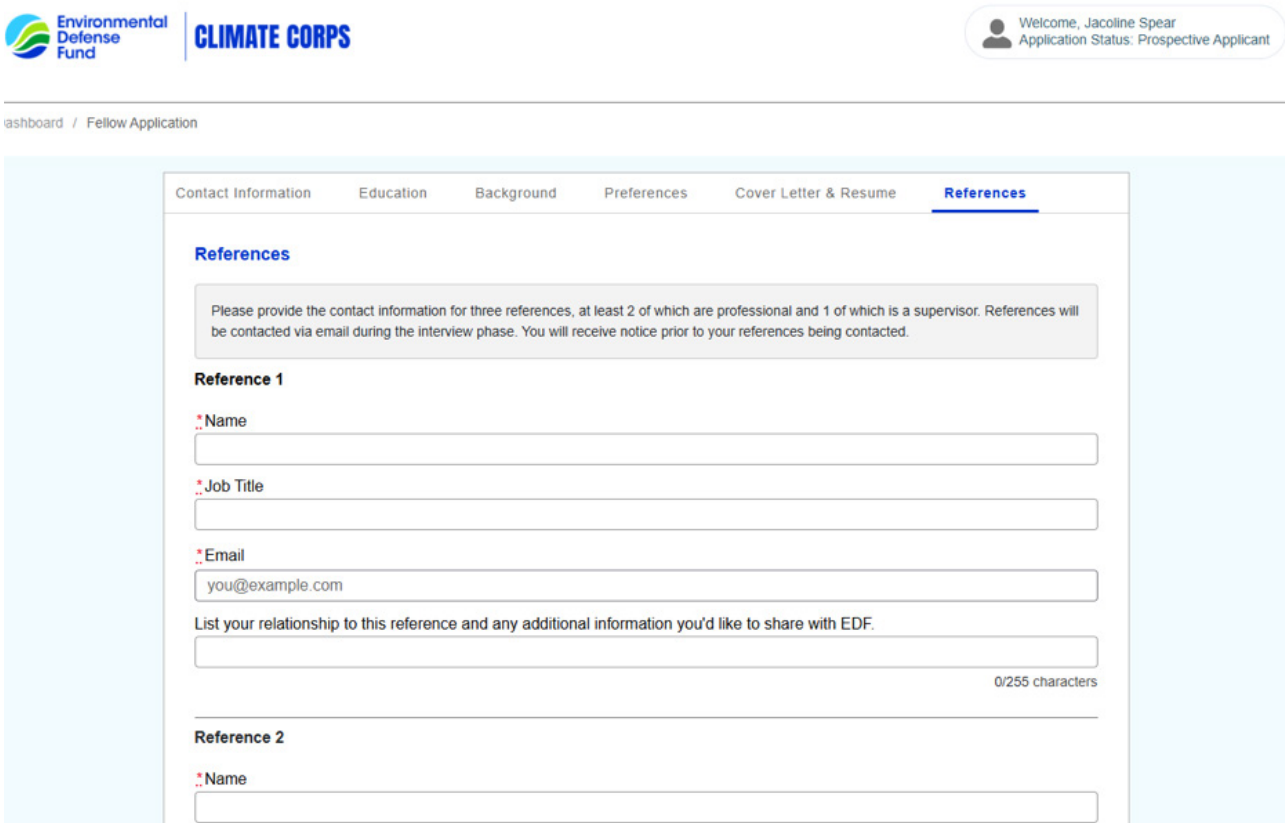
The Solution

After discussion with the EDF team, for phase 1, we selected the following 3 components for using Screen Flows:

- Submitting Fellowship Application
- Applying for Fellowship in Host Organizations
- Tracking Project Deliverables

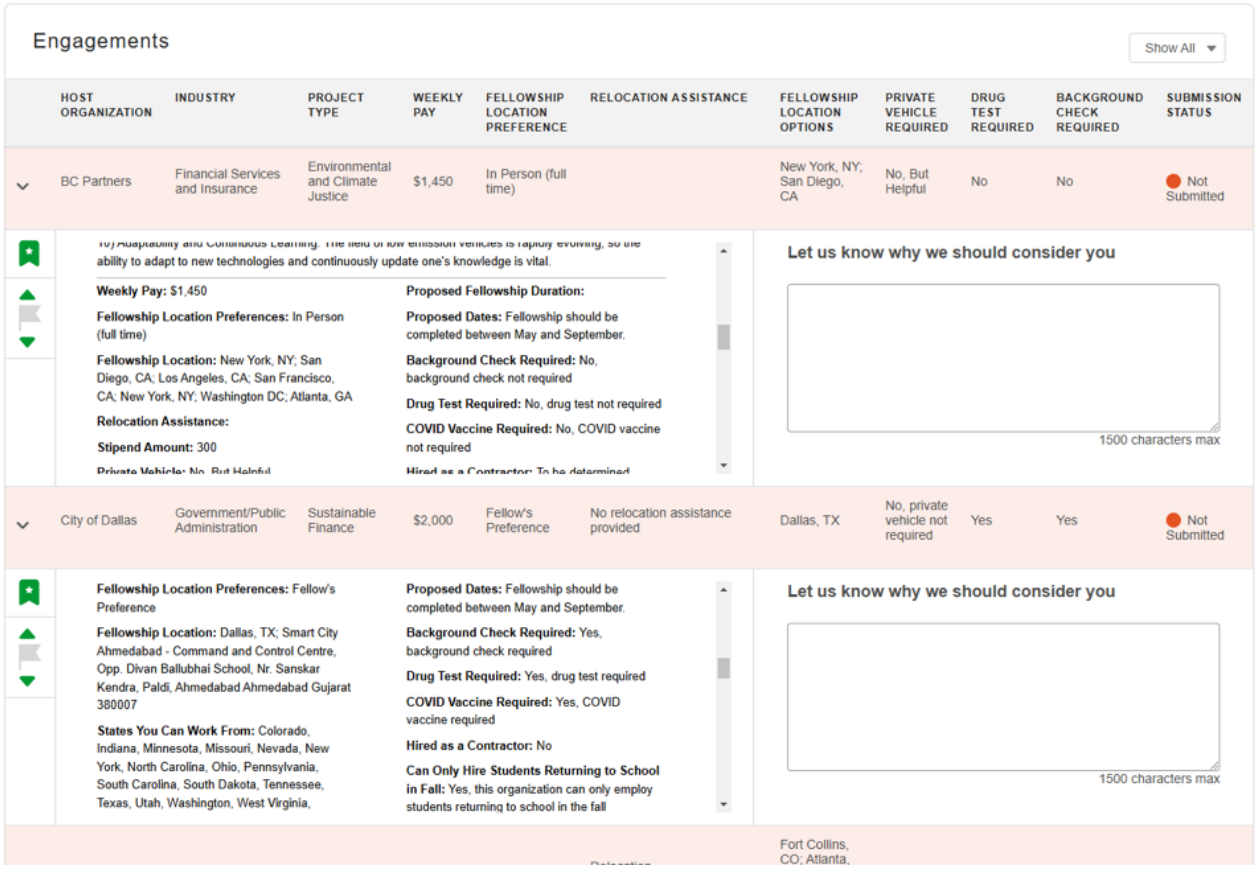
Submitting Fellowship Application

To manage the seven parts of the Fellowship Application, a tabbed layout was implemented, with each tab hosting a different screen flow. This setup allowed users to save drafts on each page before proceeding to the next. Several specific functionalities were developed to enhance user experience, including custom-styled navigation buttons for moving between tabs, conditional visibility of fields and sections based on region or other selections, dynamic picklist values for states based on the selected country, and multi-select checkboxes triggered by picklist fields. The application also featured dependent picklists for universities and schools sourced from Account data, a type-ahead field for university selection to handle large datasets, and read-only views based on application status. Additional capabilities included file uploads with status tracking and linkage to specific records, complex data validation across multiple fields, dynamic field label changes, dual-list multi-selection components, rich text instructions driven by configuration records, character count tracking in long text areas, a comprehensive review page summarizing all data, intra-page navigation via links or buttons, launching nested screen flows in modal popups, and complete custom styling aligned with the EDF style guide.



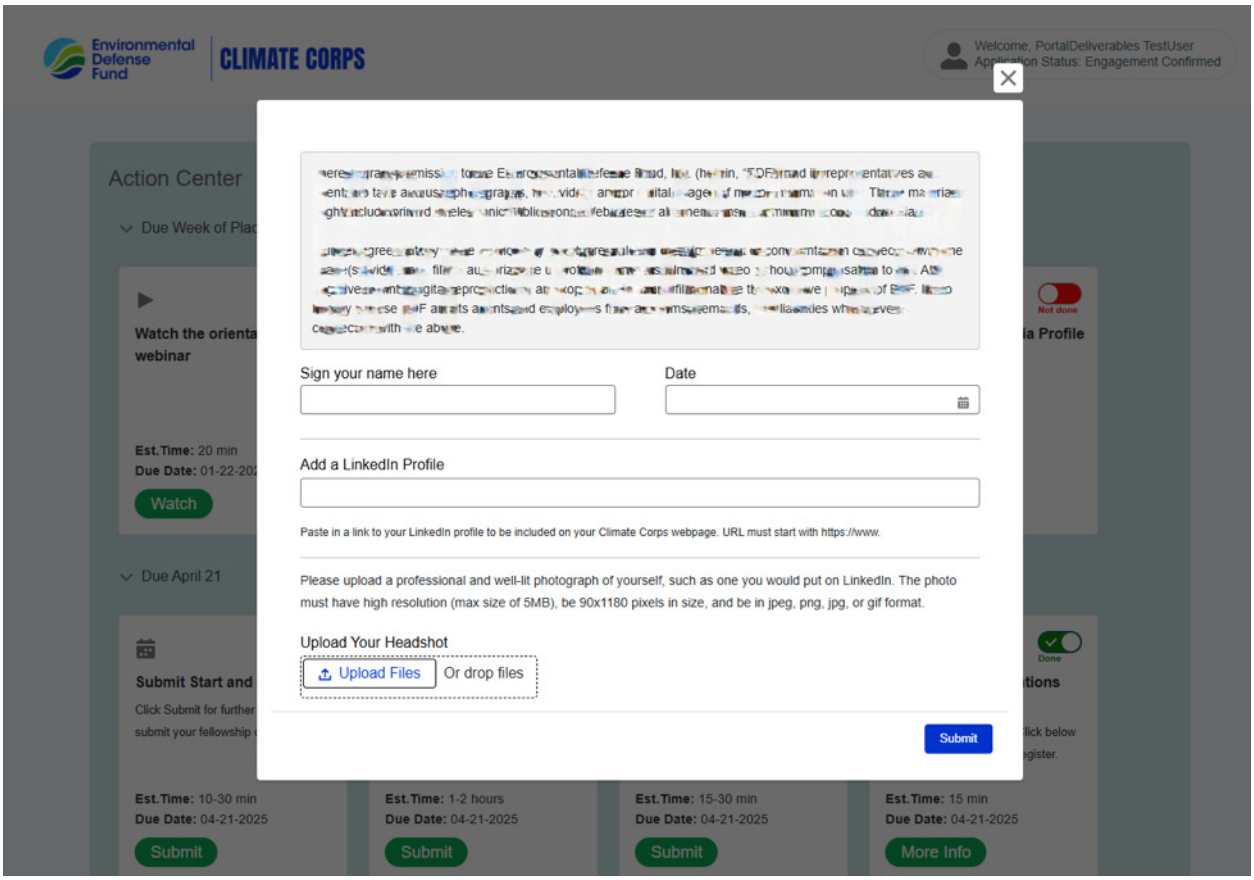
Applying for Fellowship in Host Organizations

This page enabled applicants to apply for fellowships in various host organizations by presenting a list of organizations with details such as name, industry, location, and other relevant information. Applicants could rank and bookmark these organizations for future reference. To access more in-depth information about the type of work and expected outcomes, applicants could expand each organization's row, revealing additional details about the project, ideal candidate profile, fellowship dates and duration, relocation, and housing assistance. These expanded views were powered by screen flows embedded within a custom Lightning Web Component (LWC). Key features of this implementation included embedding screen flows within tabular layouts, passing parameters to manage data for each individual row, allowing multiple rows to be expanded simultaneously with organization-specific data, and dynamically controlling data visibility based on conditions and other field values. The screen flow displayed data using a mix of linear and tabular layouts, ensured correct formatting of date and currency fields, and supported the display of data sourced from multiple related records.



Tracking Project Deliverables

This page displays a series of tiles used to track project deliverables, each indicating the task and its due date. Previously, marking a task as complete required navigating to a separate LWC page where the Fellow would input details. With the new enhancement, clicking a task tile opens a screen flow in a popup window, allowing the user to stay on the Deliverable Tracker page. Each tile is configured with a specific screen flow through a configuration setup. Key improvements include launching popup screen flows from custom LWC components, passing parameters into and receiving data back from the screen flows, and automatically refreshing the Deliverable Tracker page to reflect updated task statuses. Additional enhancements involve enabling multiple file uploads tied to specific records, implementing field-level data validation with error messages, displaying rich text instructions from records, enforcing character limits on long text fields, using dual-list boxes for multi-select fields, and applying custom styling to match the EDF style guide.



The Results

- The transition to using Screen Flow for the public portal was smooth, with zero post-production issues.
- User adoption of the new UI was seamless and well received.
- The EDF Salesforce team can now manage functionality enhancements on three key components by simply updating screen flows.
- This shift has significantly reduced dependency on external support.
- The approach has led to substantial cost savings for EDF.

The Next Phase

The transition to Screen Flow for the public portal was seamless, with no post-production issues. User adoption of the new interface was effortless and positively received. The EDF Salesforce team can now independently manage enhancements for three key components by updating the screen flows, significantly reducing reliance on external support. This shift has resulted in substantial cost savings for EDF.

OSI Digital

About OSI Digital

OSI Digital, Inc., provides purpose-built business and technology solutions that optimize performance to enable data-driven outcomes for our customers. OSI accelerates digital transformation by offering integrated solutions that capture, secure, integrate, analyze, and optimize data. Our services include the design, development, and implementation of new solutions as well as the ongoing management, enhancement, and support of our customers' existing business systems.

OSI Digital was founded in 1993, in California and has since expanded to a global team of employees worldwide. We have offices in the US, Canada, India, Philippines, Dubai, Australia, Malaysia and the UK. Our main offshore delivery center of excellence is located at our state-of-the-art campus in Hyderabad, India, with additional locations in Chennai, Delhi, and Bangalore. For over 30 years and counting, we have supported a diverse portfolio of customers across various industries, including: Software & Business Services, Financial Services, Life Sciences & Healthcare, Manufacturing, Energy, Retail, Agriculture, and the Public Sector.

Our client base ranges from start-ups to Fortune 500 corporations, including: Hyundai AutoEver America, Hyundai Capital America, Moderna, Chicken of the Sea, Beachbody, Stanley, Skechers, US News & World Report, World Oil and Kestra Medical Technologies. OSI Digital has developed strong partner alliances with the world's leading technology providers such as Oracle NetSuite, Boomi, Salesforce, Tableau, Microsoft, Amazon Web Services, and Snowflake.

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