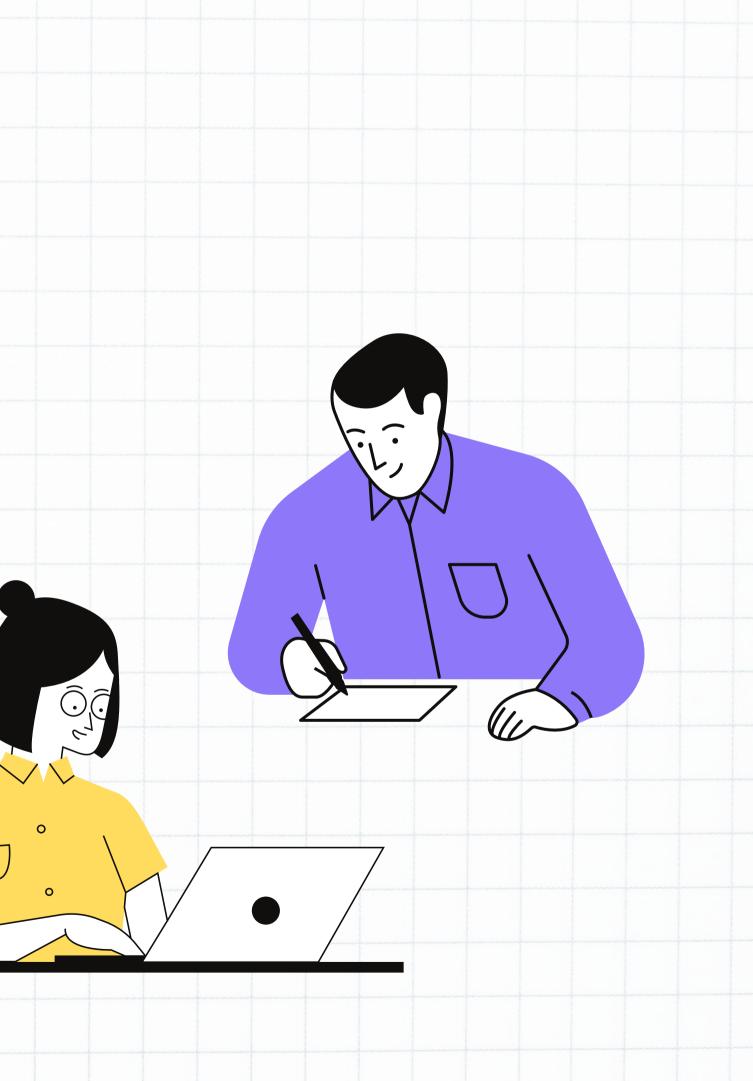
MTBF CONSULTING

Salesforce Flow Builder Training Manual

Capstone Project



<u>Contributors</u>

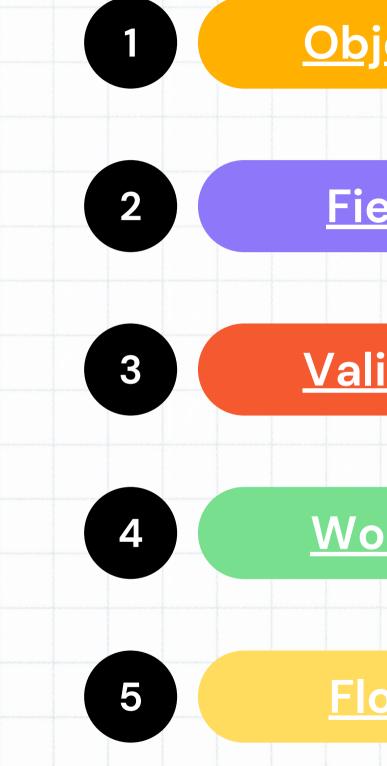
Leslie Lloyd **Object Creation** Ellie Loo **Field Creation Validation Rules** Shantel Chambers Ashley Maxi **Workflow Rules**

avid Roche

Flow Creation

Overview

This is a step-by-step implementation guide for a Salesforce Administrator to implement a flow for their organization. This guide includes the basic setup of components needed for the flow.



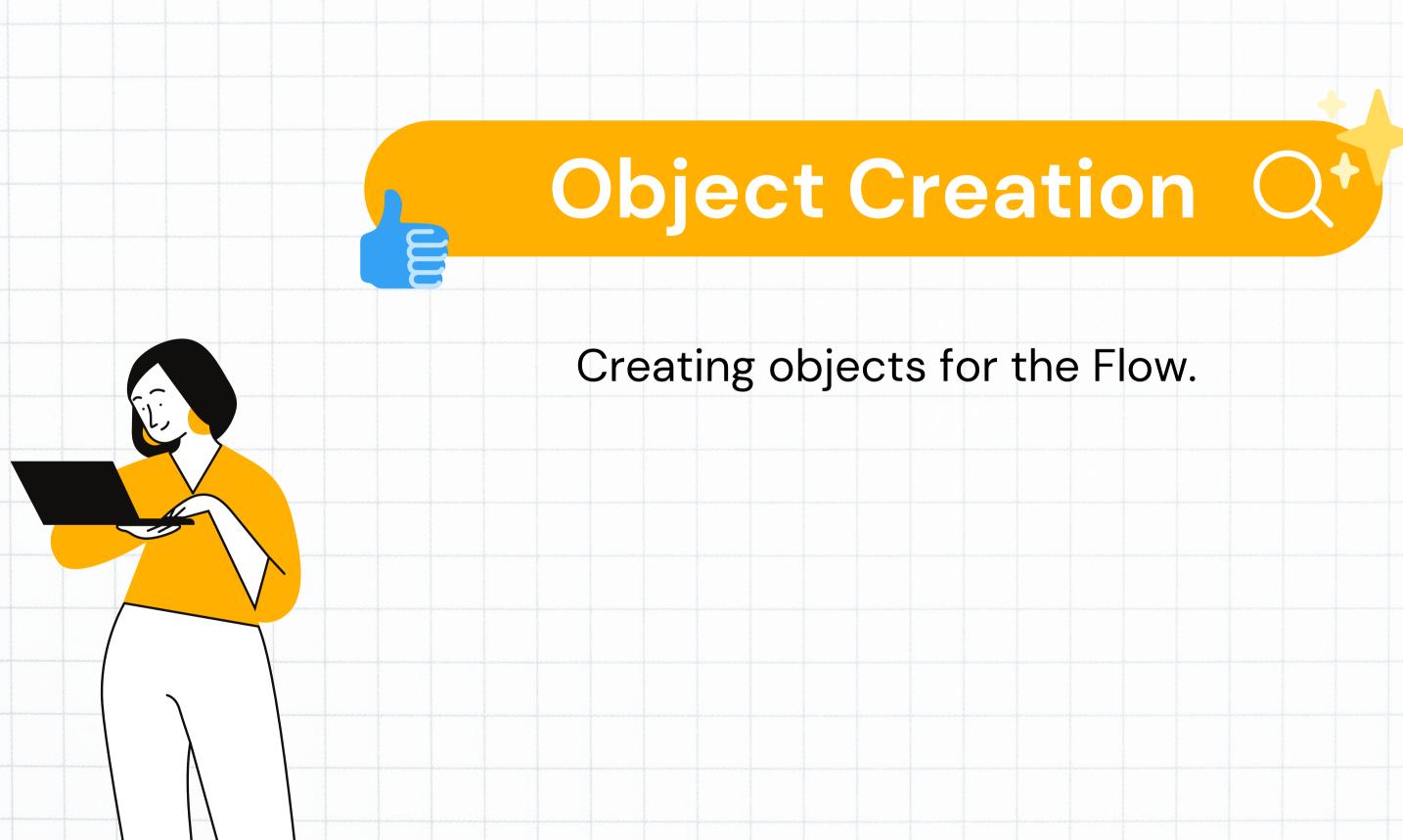
Object Creation

Field Creation

Validation Rules

Workflow Rules

Flow Creation



Create

Navigate to Setup. Select drop down on 'Object Manager' tab. Select '+New Object'.

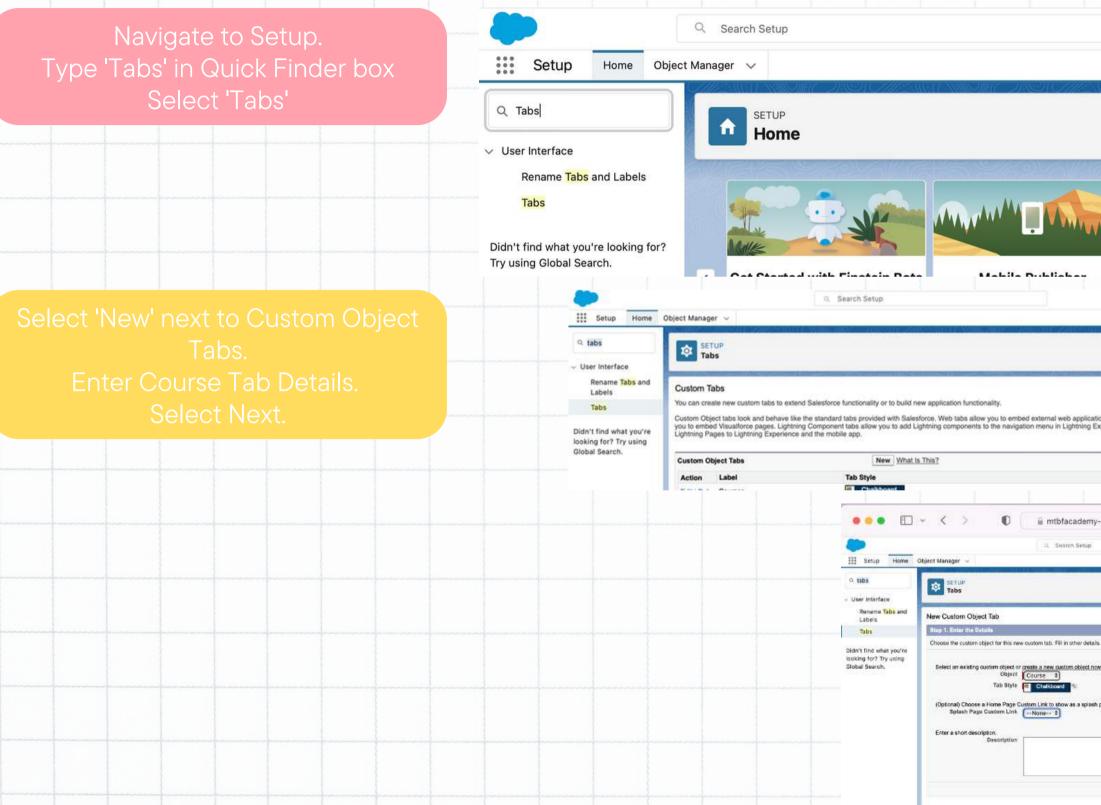
> Complete New Custom Object information for 'Course'. Select Save and New.

Repeat Steps for Custom Objects below: -Subjects

- -Course Leads
- -Technology
- -Instructor Name

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Create Tabs



Create 🔻
Help for this Page 📀
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Next

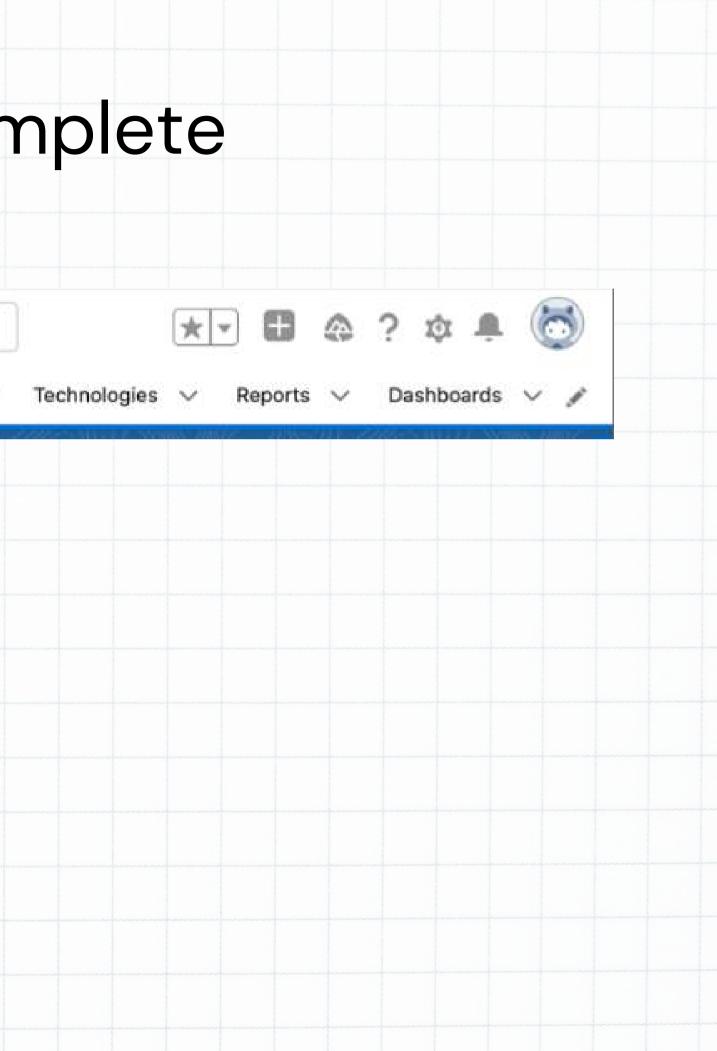
Create Tabs (cont.)

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Repeat Steps for Custom Objects: Subjects Course Leads Technology Instructor Name

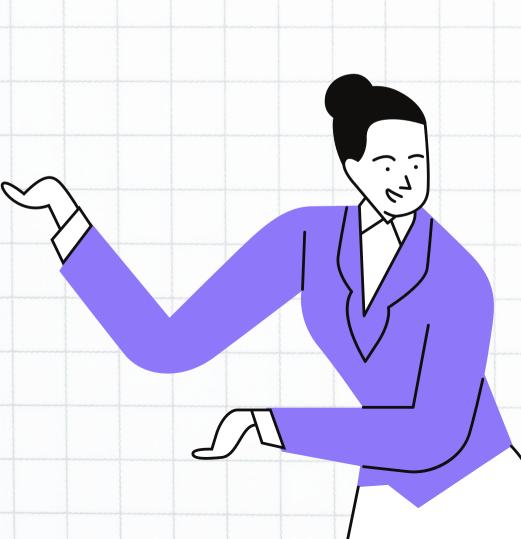
Custom Objects Complete Q Search... MTBF Academy Subjects 🗸 Courses V Course Leads 🗸 Instructor Names 🗸

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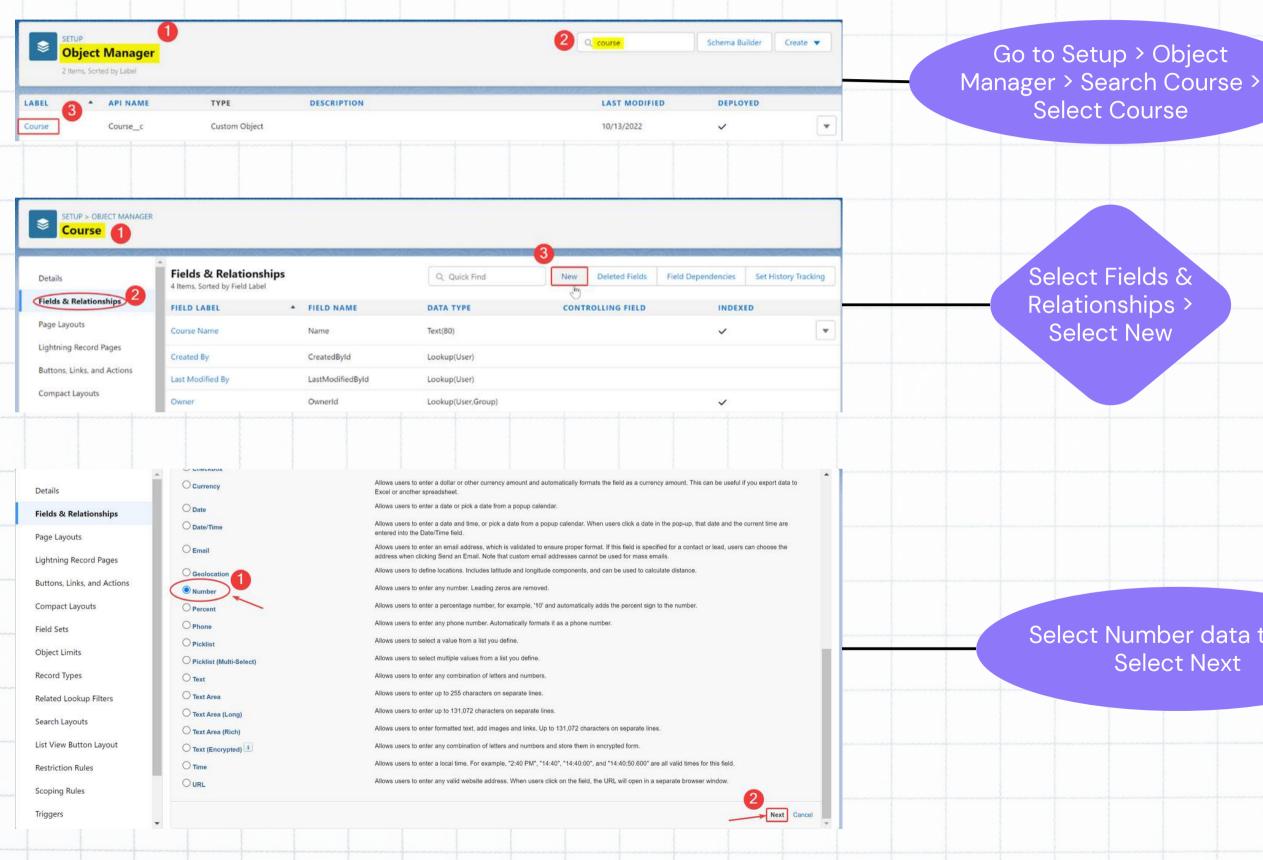
Field Creation Q

Creating fields for the objects created previously.





Creating a Fiel



Select Number data type > Select Next

Cre	eating a Field (Continued)
Enter the details Step 2 of 4	4
Previous Next Cancel	Type "No. of modules" for Field Label
Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".	
Length 2 Number of digits to the left of the decimal point Number of digits to the right of the decimal point	For length type in "2"
Field Name Field Name No_of_modules I Description Number of modules in the course I	
Help Text	In the description type "Number of modules in the course"
Required Always require a value in this field in order to save a record Unique Do not allow duplicate values	
External ID Set this field as the unique record identifier from an external system AI Prediction Use this field to store AI prediction scores add to custom report type Add this field to existing custom report types that contain this entity i	Select Next
Select Next	Select Save & New
Profile CTINEX	Step 4. Add to page layouts Step 4 of 4
p Subscription User	Previous Save & New Save Cancel
ee User Carlos C	Field Label No. of module
	Data Type Number
s-Salesforce	Field Name No_of_module
Intry Login User Control Contr	Description Number of modules in the course
ity User	Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
er C	To change the location of this field on the page, you will need to customize the page layout.
	Z Add Field Page Layout Name
mUser 🗹 🕞	Course Layout
strator I	When finished, click Save & New to create more custom fields, or click Save if you are done.
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Previous Next Cancel	Previous Save & New Save Cancel
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	Cou	Irse O	bject	t 🥎			
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		Course duration	Course_duration_c	Text(10)			•
* Course Name	* Course duration	Course Name	Course_Name_c	Text(100)			•
1		Course Name	Name	Text(80)		~	•
structor Name Search Instructor Names C	* Start date	Created By	CreatedByld	Lookup(User)			
No. of modules		End date	End_date_c	Date			•
No. of modules	* End date	Instructor Name	Instructor_Namec	Lookup(Instructor Name)		~	
Type of course	* Rating	Last Modified By	LastModifiedById	Lookup(User)			
Type of course	None	No. of modules Owner	No_of_modulesc OwnerId	Number(2, 0) Lookup(User,Group)		~	
Priority	Active	Priority	Priority_c	Picklist		//~~·	
		Rating	Rating_c	Picklist			
		Start date	Start_datec	Date			
		Type of course	Type_of_coursec	Text(100)			
Cancel	Save & New Save						

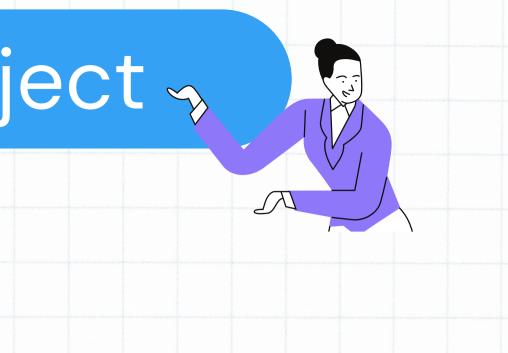
Subject Object

New Subject Fields & Relationships 11 Items, Sorted by Field Label Information FIELD LABEL · FIELD NAME Category Category_c * Category * Subject Name Created By CreatedByld Instructor Name Instructor_Name_c *Level * No. of modules Last Modified By LastModifiedByld --None-- \mathbf{v} Level Level_c * Rating Instructor Name No. of modules No_of_modules__c Search Instructor Names... Q --None-- \mathbf{w} Owner Ownerld Priority_c Priority * Priority --None-- \mathbf{w} Rating Rating_c Subject Name Subject_Name_c Name Subject Name Save Save & New Cancel

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Lookup(Instructor Name)		~	-
Lookup(User)			
Picklist			•
Number(2, 0)			
Lookup(User,Group) Picklist		~	
Picklist			•
Text(50)			
Text(80)		~	

	Cours	se Lea	d Ob	ject		
	New Course Lead					•
ormation		Fields & Relationships		٩	Quick Find New Deleted Field	s Field Dependencies Set History Tracking
* First Name	Source	13 Items, Sorted by Field Label				
1	Available Chosen	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	Employee referral	Category	Category_c	Picklist		v
		Course Lead Amount	Course_Lead_Amount_c	Currency(16, 2)		•
	Other	Course Lead ID	Name	Auto Number		✓ ▼
	Partner	Created By	CreatedById	Lookup(User)		
	Partner referral	Currency	Currency_c	Picklist		
	· · · · · · · · · · · · · · · · · · ·	Email	Emailc	Email		
Last Name	Category		Eman_c	Еттан		• •
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* Phone	Rating	Last Modified By	LastModifiedById	Lookup(User)		
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Category		Technology Name	Name	Text(80)		~	
None	•	Type	Type_c	Picklist			
	Canaal Cause & News						
	Cancel Save & New Save						



Instructor Name Object

or Name	
ualifications	Fields & Relationships 8 Items, Sorted by Field Label
	FIELD LABEL
	Availability
	Created By
vailability 🚺	Email
	Instructor Name
	Last Modified By
	Mobile
	Owner
	1
	Qualifications
ew Save	



		Q. Quick Find	New	Deleted Fields	Field Dependencies	Set History Tracking	
LD NAME	DATA TYPE	CONTROLLING	FIELD		INDEXED		
ilability_c	Text Area(255)						٧
atedById	Lookup(User)						
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ne	Text(80)				~	•	٢
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bile_c	Phone						•
nerld	Lookup(User,Group)				~		
lifications_c	Long Text Area(32768)						*

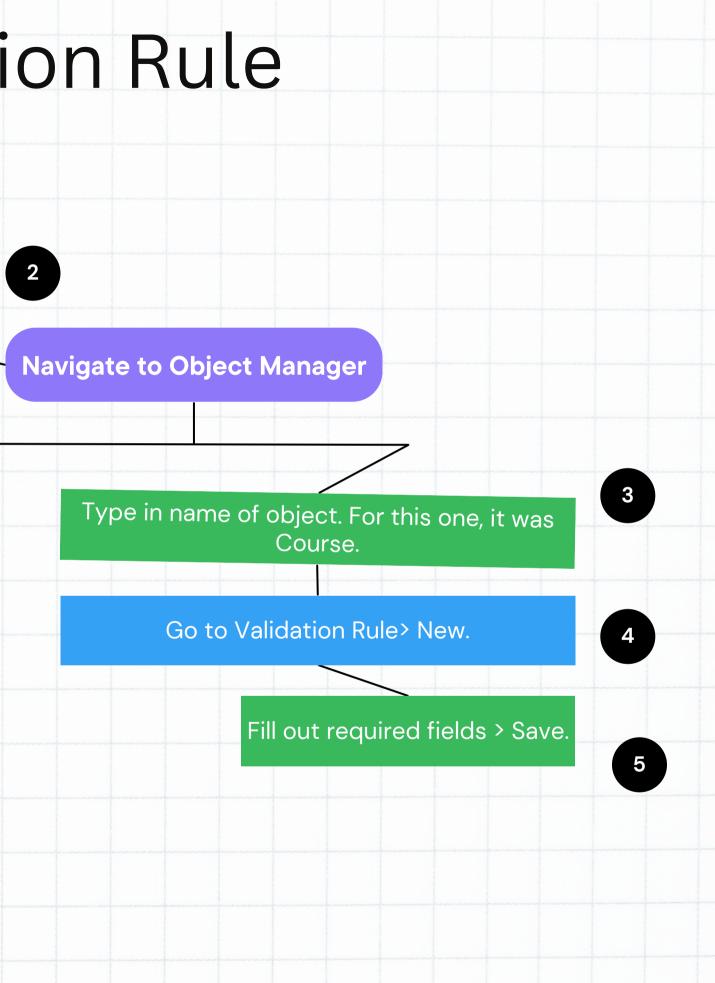
Validation Rules Q*

The purpose of these validation rules is to verify data.



How To Create A Validation Rule

ased on ia to data is ect		on Rule for Course Id in Course Object		Click Setup icon	
• • < >		mtbfacademy-dev-ed.develop.lightning.force.com	m Č		phatric tradicities
Develope	r Edition Login - Salesforce Developer (Community	Course Salesfo	rce	
	Q. Search Se	etup	*	- 🖬 🚓 ? 🌣 🐥 🐻	
Setup Home SETUP > OBJECT MA Course	Object Manager 🗸	SAME AST CHIES MICHINE AND	SICTREALET ANNOUNC	an a	
SETUP > OBJECT MA	C ARSTONIA SANDA AND	tion Rule		Help for this Page 📀	
SETUP > OBJECT MA	NAGER Course Validat Define a validation rule by s true or false. When the form	specifying an error condition and a corresponding error message. Iula expression returns true, the save will be aborted and the erro	The error condition is written as a Bo or message will be displayed. The use	plean formula expression that returns	
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SETUP > OBJECT MA Course Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions	NAGER Course Validation Define a validation rule by s true or false. When the form Validation Rule Edit Rule Name Validates_C Active Description Validates that	specifying an error condition and a corresponding error message. nula expression returns true, the save will be aborted and the erro Save Save & New Cancel ourse_Name_Field at Course Name field is provided.]	The error condition is written as a Boo or message will be displayed. The use	Olean formula expression that returns r can correct the error and try again. Quick Tips • Operators & Functions	
SETUP > OBJECT MA Course Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts	AGER Course Validat Define a validation rule by s true or false. When the form Validation Rule Edit Rule Name Validates_C Active Description Validates tha Error Condition Formu Example: Discount_Perce	pecifying an error condition and a corresponding error message. nula expression returns true, the save will be aborted and the erro Save Save & New Cancel ourse_Name_Field it Course Name field is provided.]	or message will be displayed. The use	Delean formula expression that returns r can correct the error and try again.	
SETUP > OBJECT MA Course Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Dbject Limits	AGER Course Validat Define a validation rule by s true or false. When the form Validation Rule Edit Rule Name Validates_C Active Description Validates tha Error Condition Formu Example: Discount_Perce Display an error if Discount	pecifying an error condition and a corresponding error message. nula expression returns true, the save will be aborted and the erro Save Save & New Cancel ourse_Name_Field it Course Name field is provided.]	The error condition is written as a Boo or message will be displayed. The use	Olean formula expression that returns r can correct the error and try again. Quick Tips • Operators & Functions	
SETUP > OBJECT MA Course Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets	AGER Course Validad Define a validation rule by s true or false. When the form Validation Rule Edit Rule Name Validates_C Active Description Validates that Error Condition Formu Example: Discount_Perce Display an error if Discount If this formula expression is	pecifying an error condition and a corresponding error message. nula expression returns true, the save will be aborted and the erro Save Save & New Cancel ourse_Name_Field it Course Name field is provided.] la ent_c>0.30 More Examples is more than 30%	Functions	Olean formula expression that returns r can correct the error and try again. Quick Tips • Operators & Functions	



How To Create A Validation Rule (Contd.)

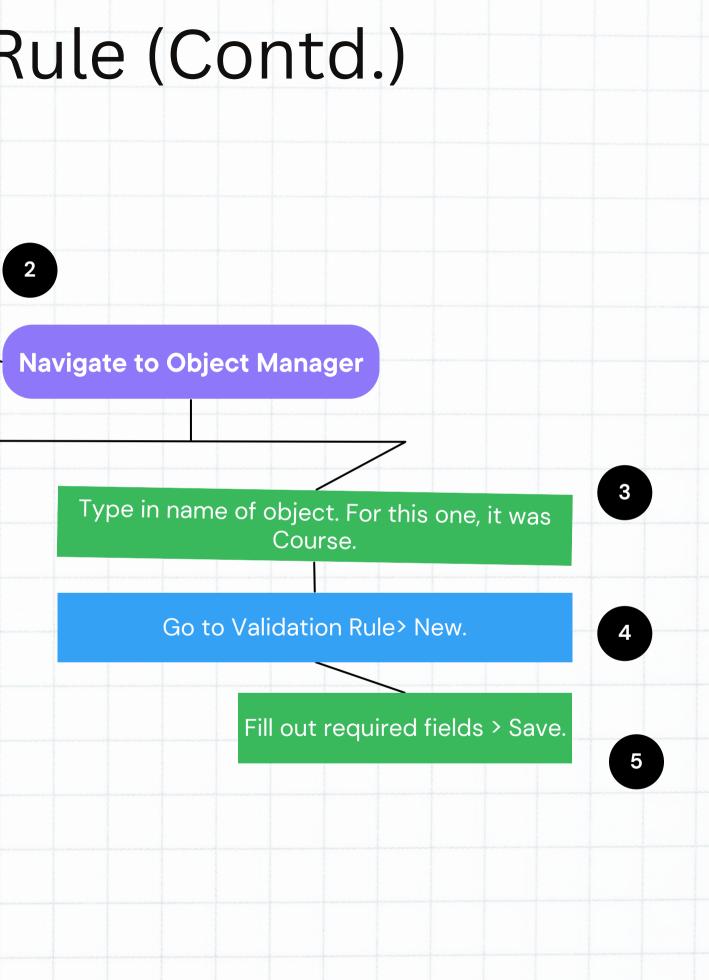
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Validation Rule for Course Name Field in Course Object

Click Setup icon

Details	OR(ISBLANK(Course_Name_c))	ADDMONTHS AND ASCII ASIN	
elds & Relationships		Insert Selected Function	
age Layouts		ABS(number) Returns the absolute value of a number, a number without its sign	
ghtning Record Pages		Help on this function	
uttons, Links, and Actions	Check Syntax No errors found		
ompact Layouts			
eld Sets	Error Message		
	Example: Discount percent cannot exceed 30%		
oject Limits	This message will appear when Error Condition formula is true		
ecord Types	Error Message Please enter Course Name.		
	This even exercises are either encount the ten of the even or holes a const	fic field on the page	
elated Lookup Filters	This error message can either appear at the top of the page or below a speci		

Keeping the language as simple as possible helps.



All Validation Rules for Course Object

Setup Home C	Dbject Manager 🗸			
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Course				
Buttons, Links, and Actions	Validation Rules 10 Items, Sorted by Rule Name			
Compact Layouts	Validates_Active_Field	Active	Please check Active.	~
Field Sets	Validates_Course_Duration_Field	Course duration	Please enter Course Duration.	~
Object Limits Record Types	Validates_Course_Name_Field	Course Name	Please enter Course Name.	~
Related Lookup Filters	Validates_End_Date_Field	End date	Please enter End Date.	~
Search Layouts	Validates_Instructor_Name_Field	Instructor Name	Please enter Instructor Name.	~
List View Button Layout Restriction Rules	Validates_No_of_Modules_Is_Provided	No. of modules	Please enter No. of Modules	~
Scoping Rules	Validates_Priority_Field	Priority	Please select Priority.	~
Triggers	Validates_Rating_Field	Rating	Please select Rating.	~
Flow Triggers	Validates_Start_Date_Field	Start date	Please enter Start Date.	~
Validation Rules	valuates_Start_Date_Field	Start uale	Flease enter Start Date.	V

All Validation Rules for Subject Object

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Subject				
uttons, Links, and ctions	Validation Rules 7 Items, Sorted by Rule Name			
Compact Layouts	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE
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Dbject Limits	Validates_Instructor_Name_Field	Instructor Name	Please enter Instructor Name.	~
ecord Types	Validates_Level_Field	Level	Please select Level.	~
elated Lookup Filters				•
earch Layouts	Validates_No_of_Modules_Field	No. of modules	Please enter No. of Modules	~
ist View Button Layout	Validates_Priority_Field	Priority	Please select Priority.	~
Restriction Rules	Velidetee Deting Field	Datian	Disease colocit Dating	
Scoping Rules	Validates_Rating_Field	Rating	Please select Rating.	~
riggers	Validates_Subject_Name_Field	Subject Name	Please enter Subject Name.	~
ow Triggers				
alidation Rules				

All Validation Rules for Course Leads Object

Setup

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Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules Triggers Flow Triggers **Validation Rules**

Validation Rules 9 Items, Sorted by Rule Name			
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE
Validates_Category_Field	Category	Please select Category.	~
Validates_Course_Lead_Amount_Field	Course Lead Amount	Please enter Course Lead Amount.	~
Validates_Currency_Field	Currency	Please select Currency.	~
Validates_Email_Field	Email	Please enter Email.	~
Validates_First_Name_Field	First Name	Please enter First Name.	~
Validates_Last_Name_Field	Last Name	Please enter Last Name.	~
Validates_Phone_Field	Phone	Please enter Phone.	~
Validates_Rating_Field	Rating	Please select Rating.	~
Validates_Source_Field	Source	Please select Source(s).	~

All Validation Rules for Technology Object

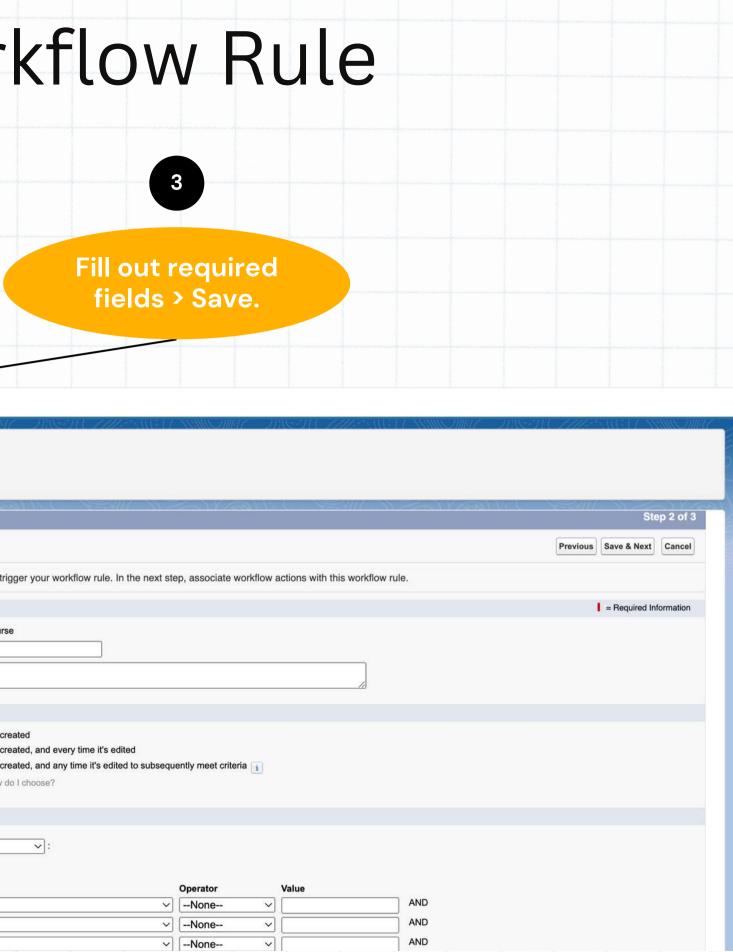
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Buttons, Links, and	Validation Rules			Second Aller		
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compact Layouts	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE		
ield Sets	Validates_Active_Field	Active	Please check Active.	~		
bject Limits	Validates_Category_Field	Category	Please select Category.			
ecord Types	validates_category_rield	Category	Flease select Category.	~		
elated Lookup Filters	Validates_Name_Field	Name	Please enter Name.	~		
earch Layouts	Validates_Rating_Field	Rating	Please select Rating.	~		
ist View Button Layout						
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Workflow Rules

Created in such a way that data is updated after the following criteria is met.



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rch.				undef datafor undef datafor undef gange	Run this rule if the criteria are met FieldNoneNoneNone



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	 Q workflow rules ✓ Process Automation 	SETUP Workflow Rules	STOTICS AGA MANDING - DISTICTUS AND ANNONNA
	Workflow Rules Didn't find what you're looking for? Try using Global Search.	Edit Rule High Priority + Subject Category and # of Modules Step 3: Specify Workflow Actions	Help for this Page 📀 Step 3 of 3 Done
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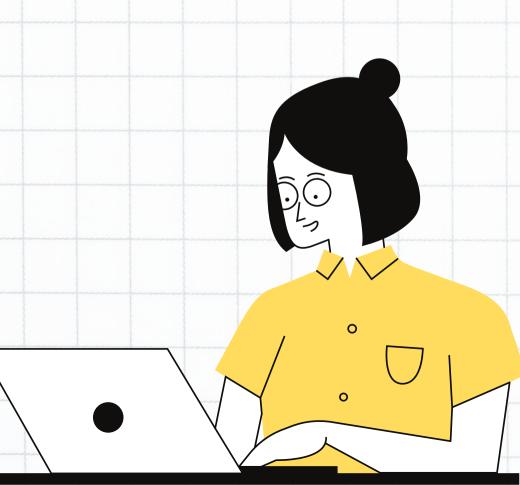
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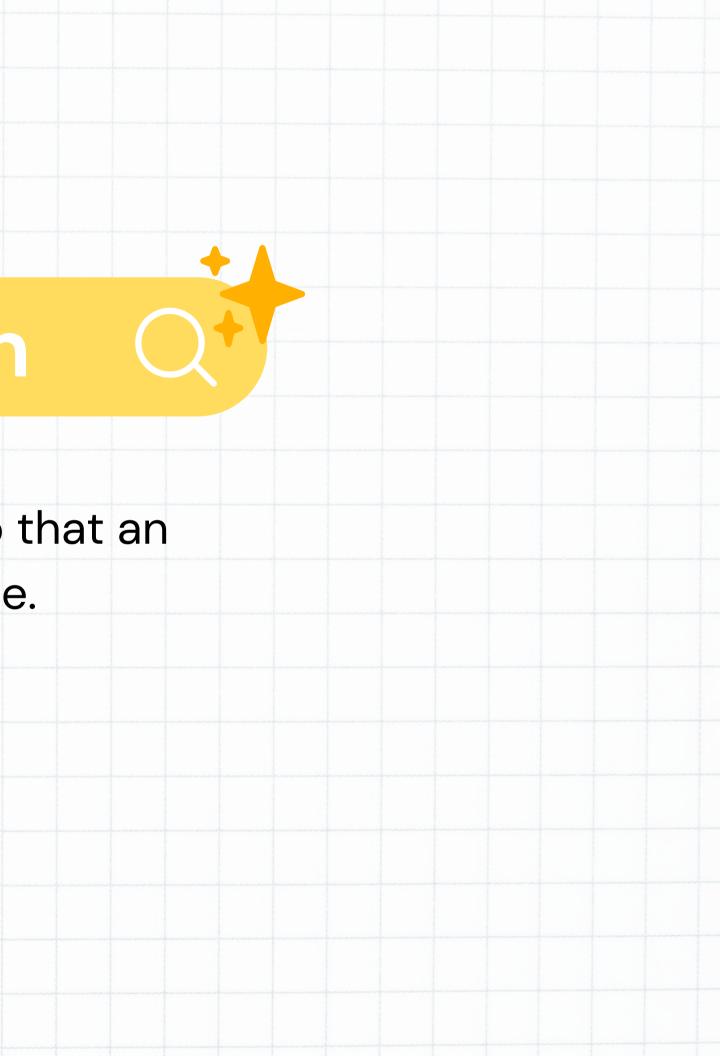
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	Immediate Workflow Actions	
	No workflow actions have been added. Add Workflow Action	
	Time-Dependent Workflow Actions See an example	
	No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.	

Flow Creation

Creating a flow in the scenario that an end-user submits a Case.





Flow Creatio

Type in Flows in the Quick Find Bar 1

- **Select Flows** 2
- **Click on New Flow** 3

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Interviews	Change Case Owner to Incident Owner	Screen Flow
Process Builder	Close Change Request & Related Issues	Screen Flow
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Email Alerts	Create a Case	Screen Flow
Field Updates	Create Order Summary Flow	Autolaunched Flow
Outbound Messages	Create Process Exception Flow	Autolaunched Flow
Send Actions	Discount Flow	Screen Flow
Tasks	Even Exchange Flow	Screen Flow
Workflow Rules	Generate Appointment Invitation	Salesforce Schedu
	Inbound Cancel Appointment	Salesforce Schedu
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 Monitoring 	Inbound New Appointment	Salesforce Schedu
Time-Based Workflow	Inbound New Guest Appointment	Salesforce Schedu
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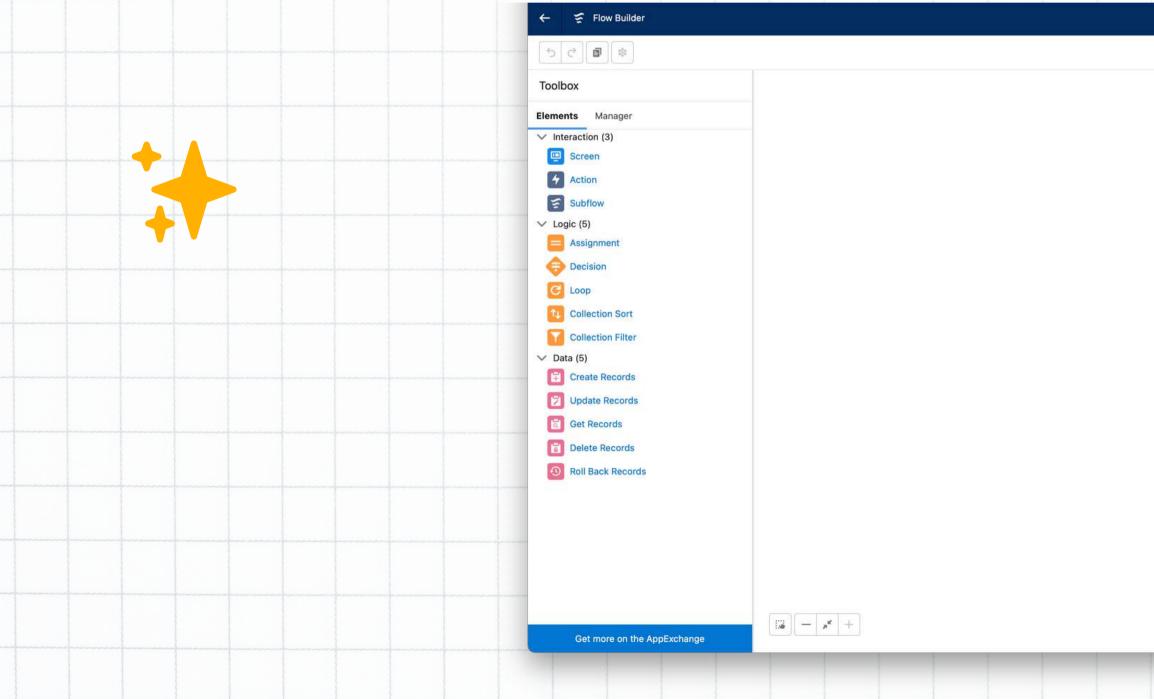
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	Flow Creation	
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Elements Manager	New Flow	
	Screen Flow Record-Triggered Flow Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and Image: Core of the core of t	
	Schedule-Triggered Flow Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background. Platform Event—Triggered Flow Launches when a platform event message is received. This autolaunched flow runs in the background.	
	Autolaunched Flow (No Trigger) Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.	
		Create

Flow Creatio

⁵ Select Form on the top right for Free–Form to have an easier layout for your Flow. Then select Screen on top left.



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Flov

After personalize the screen flow select Get Records. Make sure you select the right queue to be added to your Flow.

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🖳 Screen	
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Update Records	
Get Records	
Delete Records	
Roll Back Records	

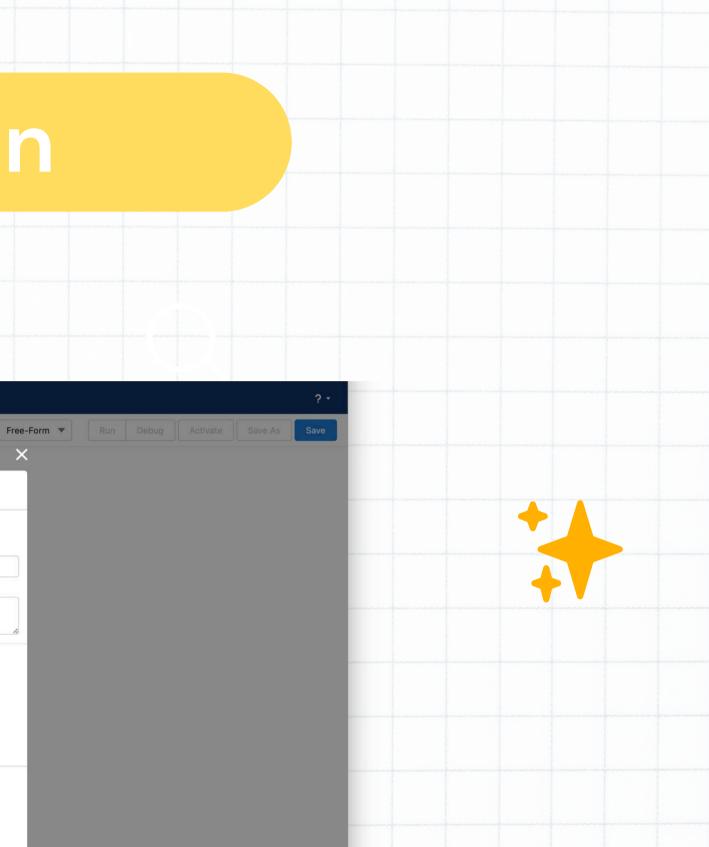
v Creat	ion	
New Get	Records	? * Activate Save As Save
Find Salesforce records and store their field values in flow variables Label Get Queue Description Look up queue where the cases should be placed in. Get Records of This Object Object Group Filter Group Records Condition Requirements	API Name Get_Queue + New Resource Global Constants A _a \$GlobalConstant.EmptyString Equivalent to empty string (not null) \$GlobalConstant.False Equivalent to false, unchecked, or no \$GlobalConstant.True Equivalent to true, checked, or yes SCREEN COMPONENTS A _a Course_Enrolled Text # Email Email >	
All Conditions Are Met (AND)	filter by a unique field, such as ID.	

- *

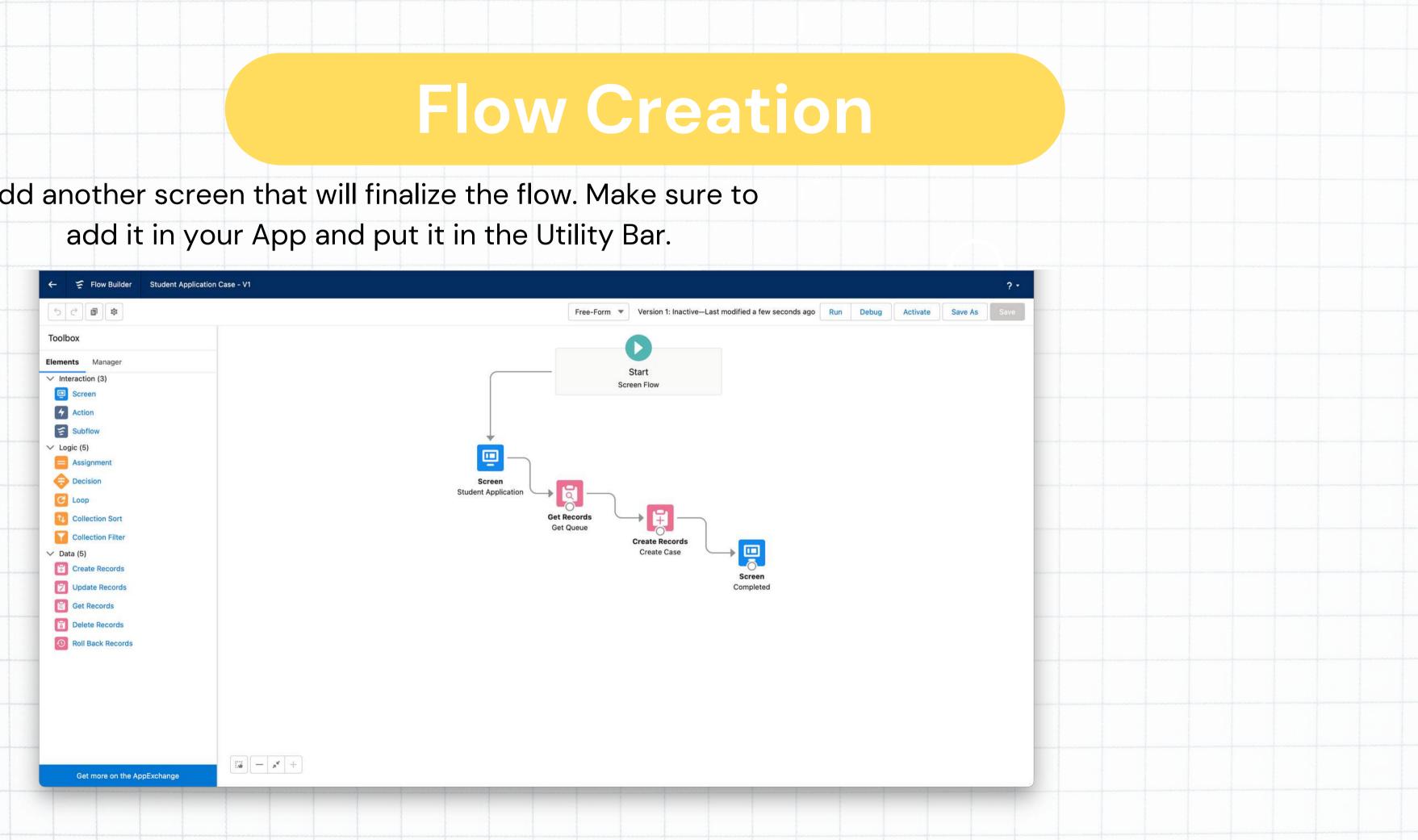
Flow Creation

Select Create Records. Choose the object that will be housing the records (for this one we will choose Case). Once selected, add the fields that you want to see on the form.

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personal and person and and a	Manager		New C	Create Records	
V Interac	reen		Create Salesforce records using values from the flow.	• API Name	
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Co ♥ Co	op ollection Sort ollection Filter		How Many Records to Create One Multiple How to Set the Record Fields Use all values from a record Use separate resources, and literal values Create a Record of This Object *Object Search objects	٩	
			A value is required.		Cancel Done
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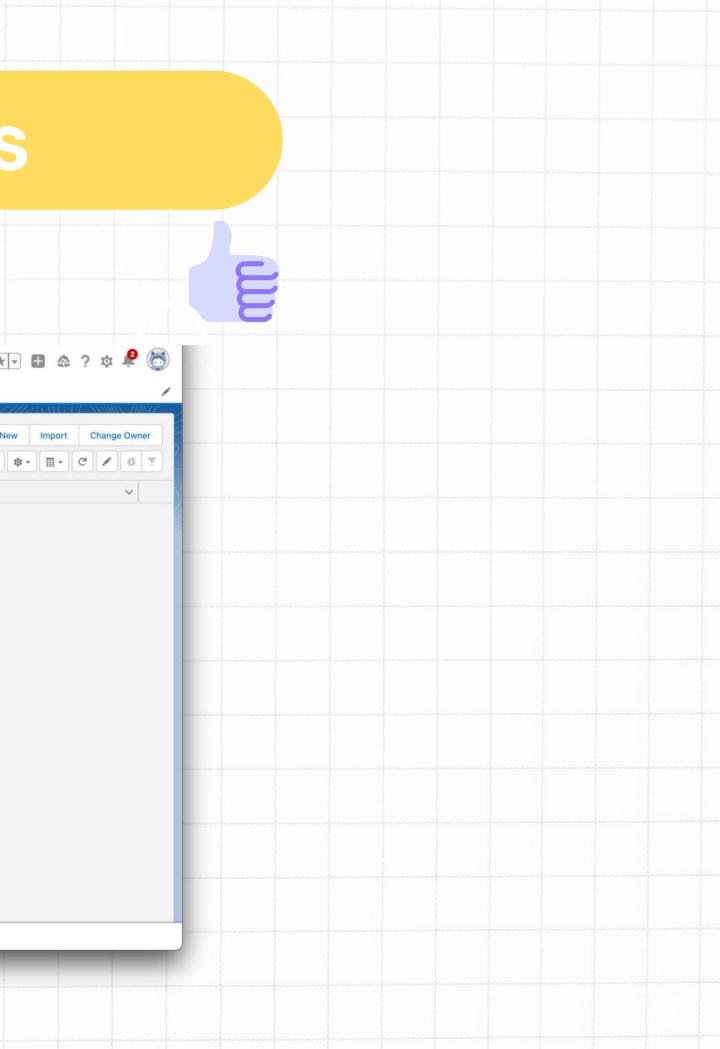
Add another screen that will finalize the flow. Make sure to 8 add it in your App and put it in the Utility Bar.



Flow Process

he student wil	l type in the form	and click submit. ⁻	That will
create a	a case for the Instr	ructor to look into.	and provide the device of provide the second sec

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I wanted to go through Biology 101.		



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	Flow Pr	ocess		
create a case for the l ds to be escalated, you	form and click submit. That nstructor to look into. If it a can assign it to someone , they will click Resolved.		? ☆ ₽ 💿	
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 Student Application C 209-342-4810 Email industry@mac.com Course Enrolled Science Subject Help With Chapter 2 Instructor Name Mindy Jefferson Query Description I wanted to go through Biology 101. 	You haven't viewed any Courses recently. Try switching list views.			

Conclusion

Thank you!

This concludes the process of completing a

flow in Salesforce through the following steps:

- Creating objects
- Creating fields
- Creating validation rules
- Creating workflow rules
- Creating a flow

Questions?

