

MTBF CONSULTING

Salesforce Flow Builder Training Manual

Capstone Project



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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.

1

Object Creation

2

Field Creation

3

Validation Rules

4

Workflow Rules

5

Flow Creation

Object Creation

Creating objects for the Flow.



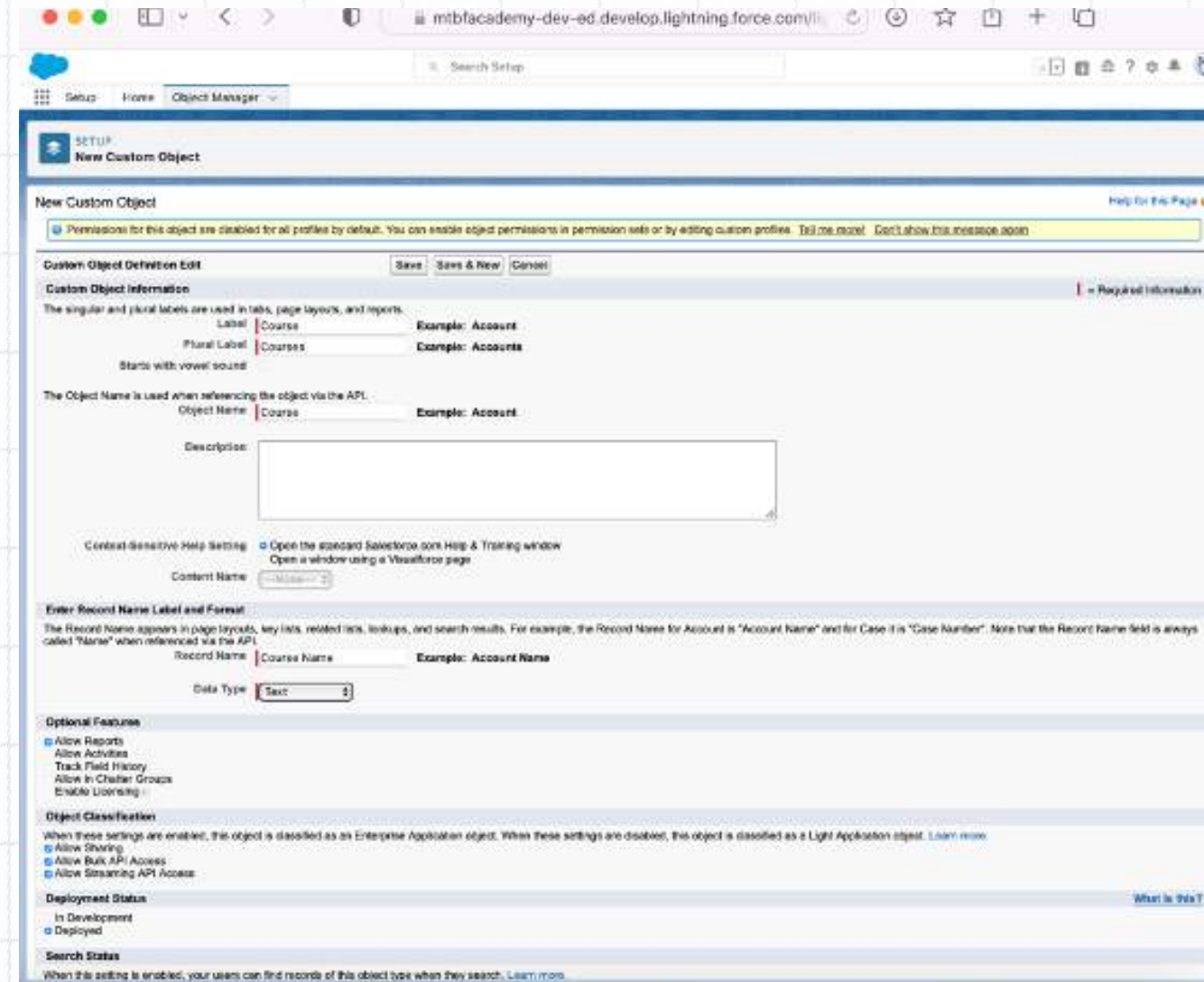
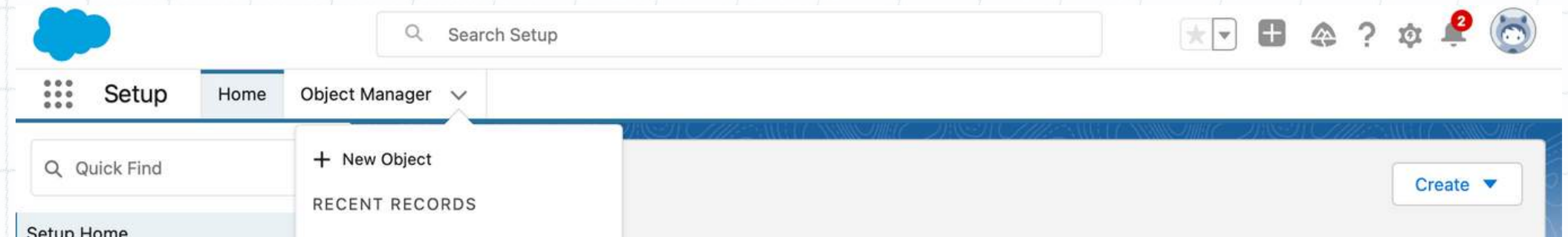
Create Custom Objects

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:

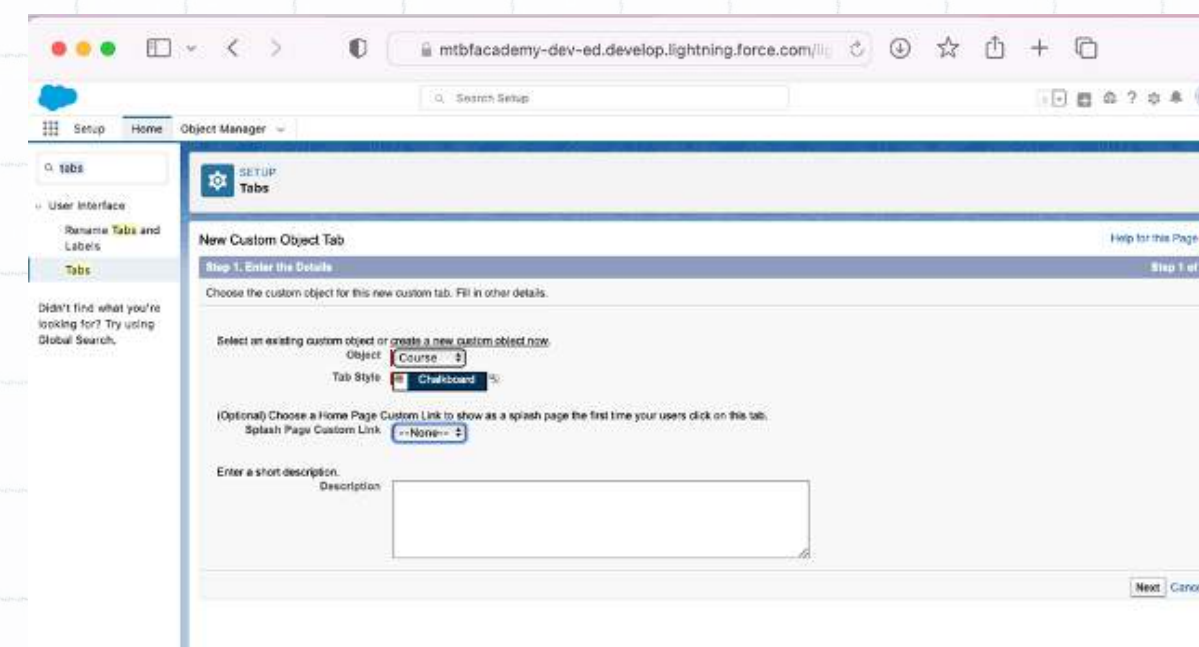
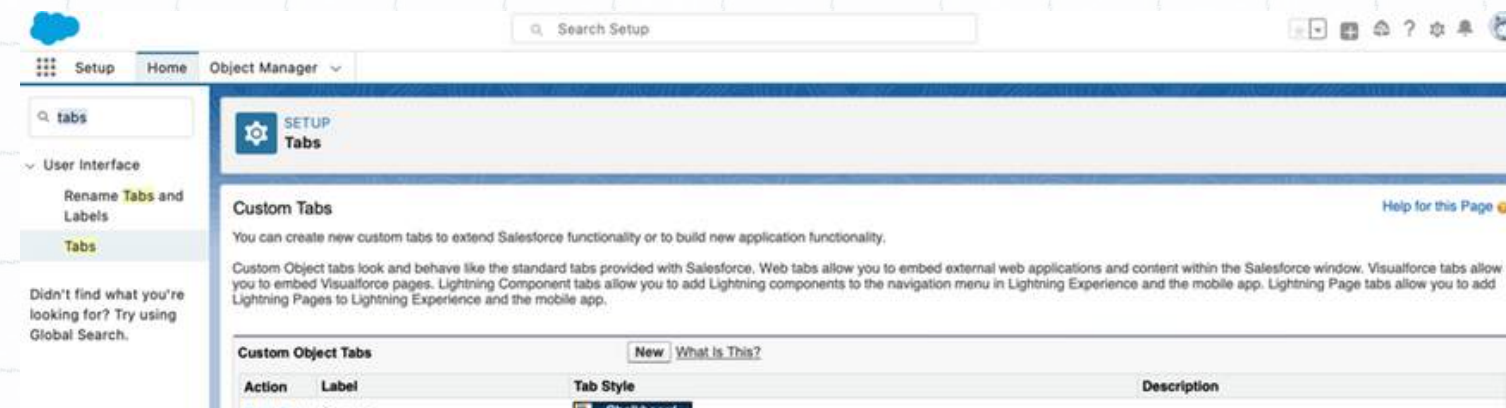
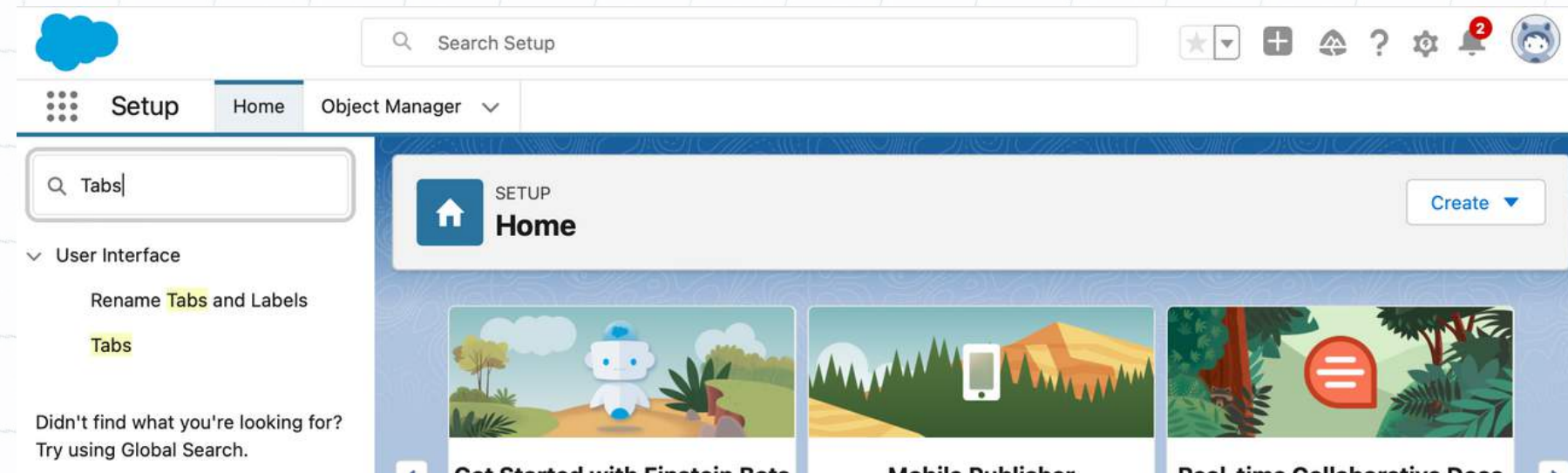
- Subjects
- Course Leads
- Technology
- Instructor Name



Create Tabs

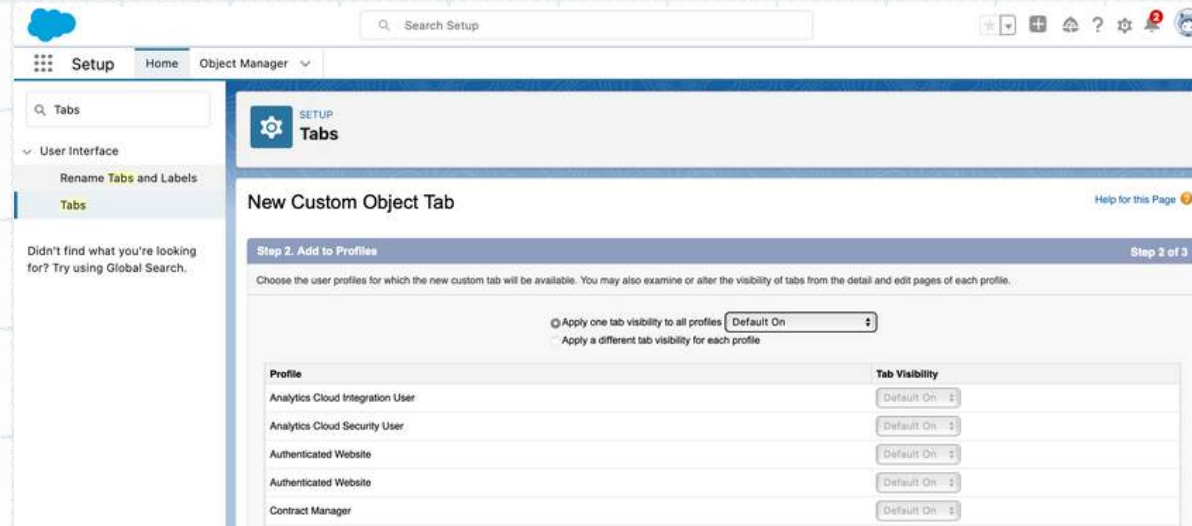
Navigate to Setup.
Type 'Tabs' in Quick Finder box
Select 'Tabs'

Select 'New' next to Custom Object
Tabs.
Enter Course Tab Details.
Select Next.

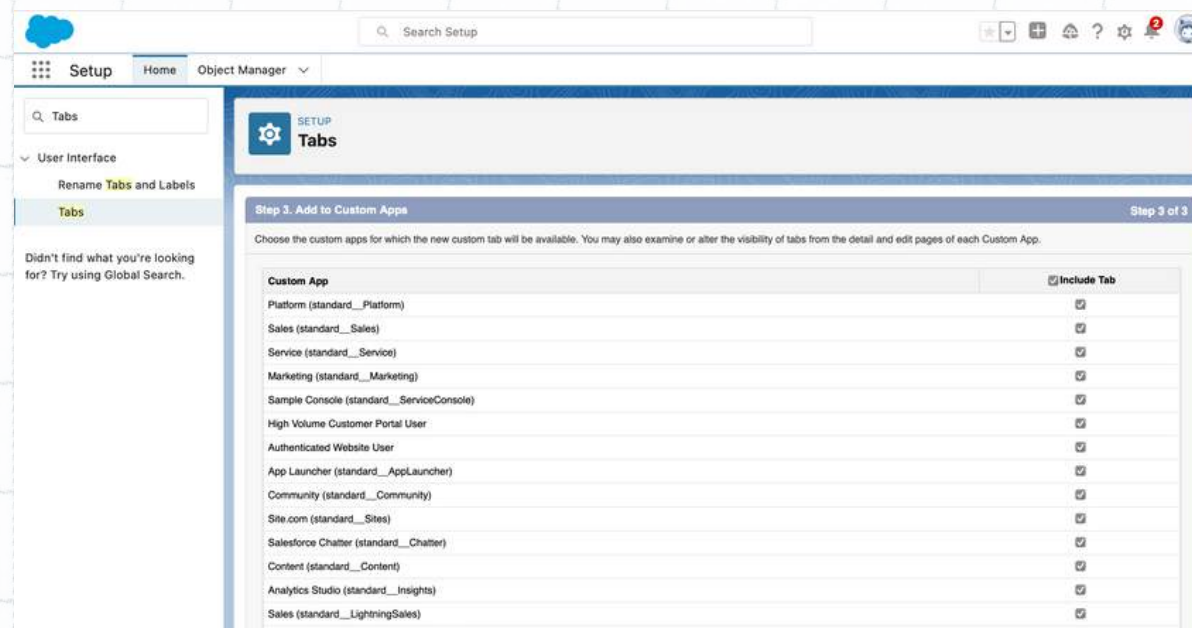


Create Tabs (cont.)

Add Course tab to profiles.

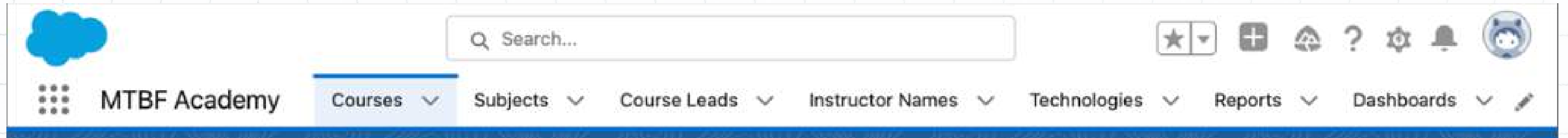


Add Course tab to apps.
Select 'Save'.






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

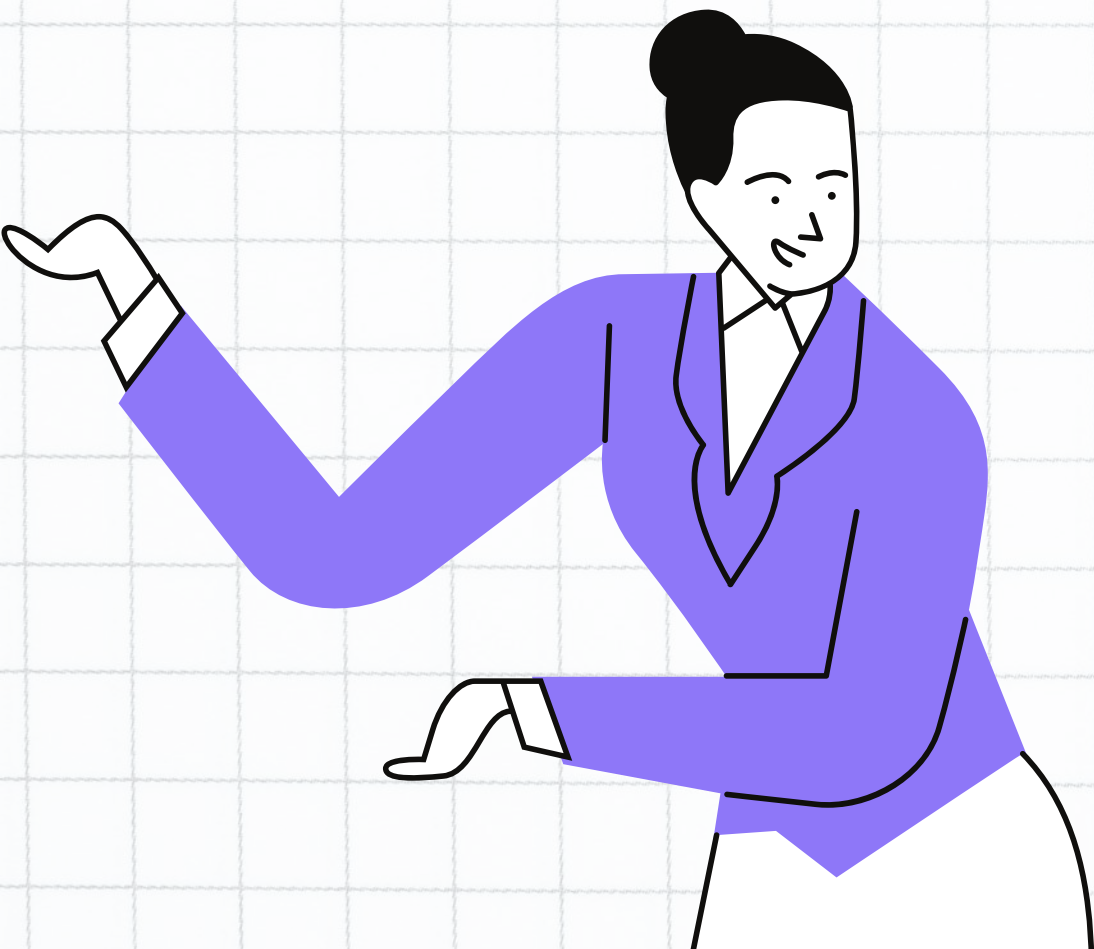
Custom Objects Complete



Field Creation



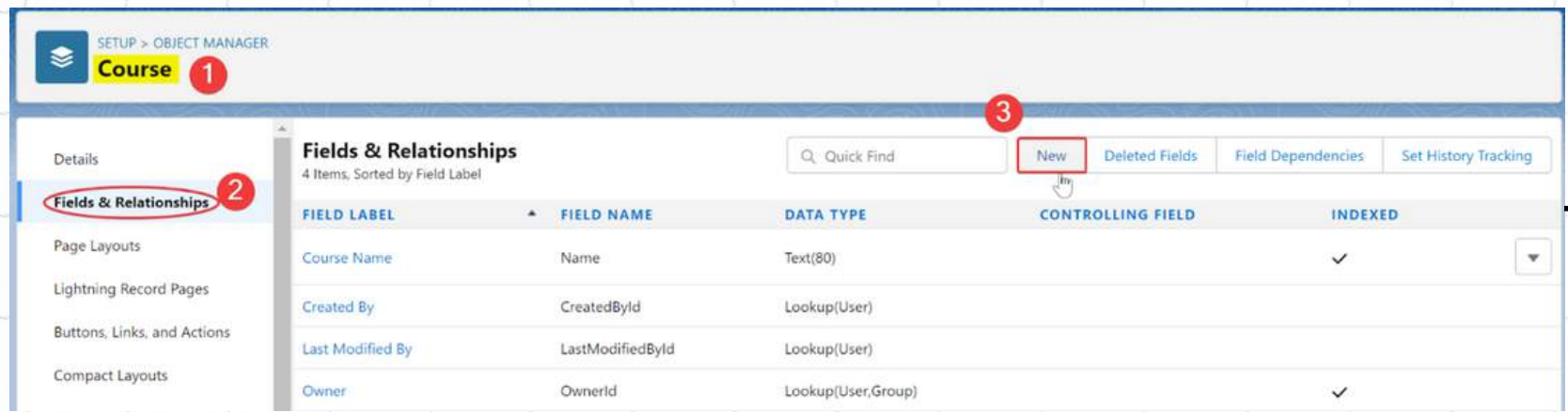
Creating fields for the objects created previously.



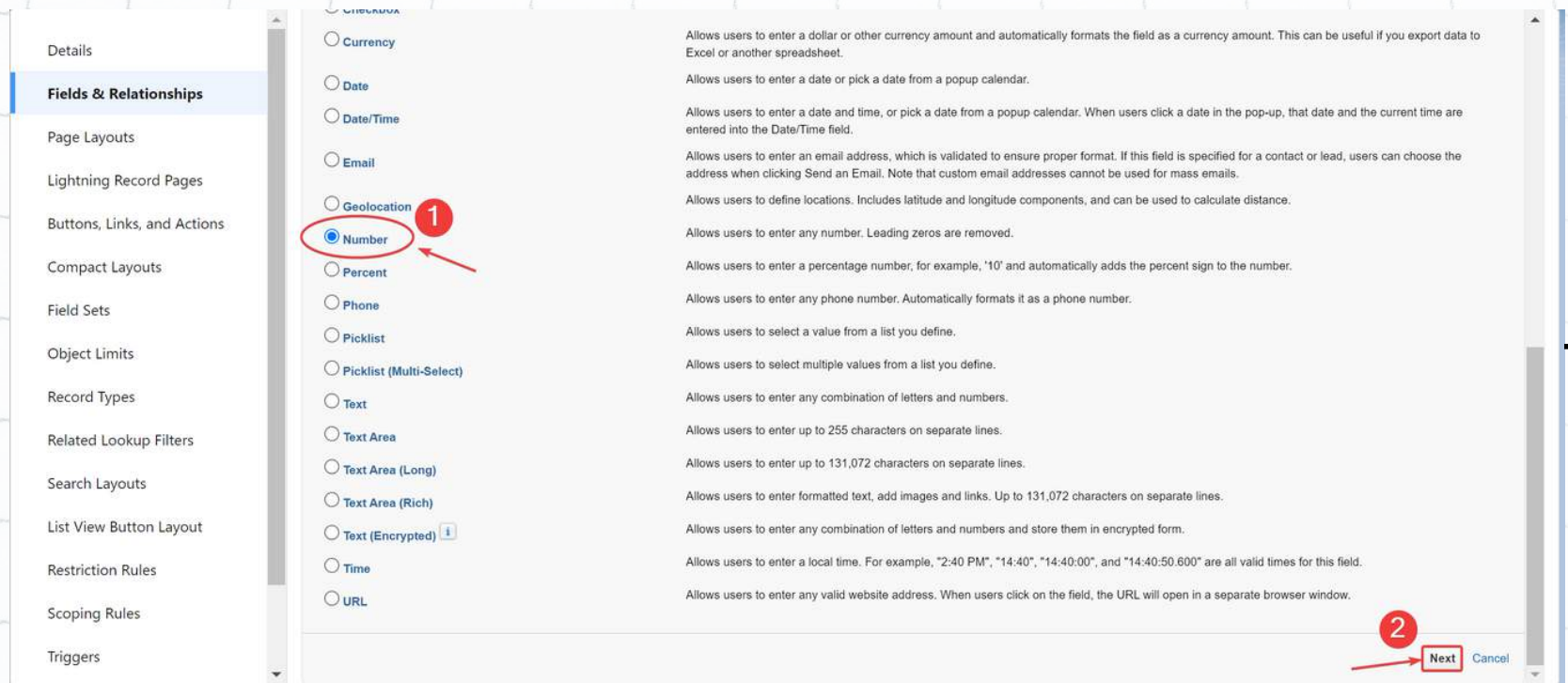
Creating a Field



Go to Setup > Object Manager > Search Course > Select Course



Select Fields & Relationships > Select New



Select Number data type > Select Next

Creating a Field (Continued)

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

1 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".

2 Length

Number of digits to the left of the decimal point Number of digits to the right of the decimal point

Field Name

3 Description

Help Text

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

Auto add to custom report type Add this field to existing custom report types that contain this entity

Type "No. of modules" for Field Label

For length type in "2"

In the description type "Number of modules in the course"

Select Next

Select Next

| | | |
|-----------------------------------|-------------------------------------|--------------------------|
| Custom: Sales Profile | <input type="checkbox"/> | <input type="checkbox"/> |
| Custom: Support Profile | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Force.com - App Subscription User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Force.com - Free User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Gold Partner User | <input type="checkbox"/> | <input type="checkbox"/> |
| Identity User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Marketing User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Minimum Access - Salesforce | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Partner App Subscription User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Partner Community Login User | <input type="checkbox"/> | <input type="checkbox"/> |
| Partner Community User | <input type="checkbox"/> | <input type="checkbox"/> |
| Read Only | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Silver Partner User | <input type="checkbox"/> | <input type="checkbox"/> |
| Solution Manager | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Standard Platform User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Standard User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| System Administrator | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Work.com Only User | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Previous Next Cancel

Select Save & New

Step 4. Add to page layouts Step 4 of 4

Previous Save & New Save Cancel

| | |
|-------------|---------------------------------|
| Field Label | No. of module |
| Data Type | Number |
| Field Name | No_of_module |
| Description | Number of modules in the course |

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.

To change the location of this field on the page, you will need to customize the page layout.

| | |
|---|------------------|
| <input checked="" type="checkbox"/> Add Field | Page Layout Name |
| <input checked="" type="checkbox"/> | Course Layout |

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

Course Object



New Course

Information

* Course Name

Instructor Name

* No. of modules

* Type of course

* Priority

* Course duration

* Start date

* End date

* Rating

Active

Fields & Relationships

14 Items, Sorted by Field Label

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|-------------------|-------------------------|-------------------|---------|
| Active | Active_c | Checkbox | | |
| Course duration | Course_duration_c | Text(10) | | |
| Course Name | Course_Name_c | Text(100) | | |
| Course Name | Name | Text(80) | | ✓ |
| Created By | CreatedById | Lookup(User) | | |
| End date | End_date_c | Date | | |
| Instructor Name | Instructor_Name_c | Lookup(Instructor Name) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| No. of modules | No_of_modules_c | Number(2, 0) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Priority | Priority_c | Picklist | | |
| Rating | Rating_c | Picklist | | |
| Start date | Start_date_c | Date | | |
| Type of course | Type_of_course_c | Text(100) | | |

Subject Object



New Subject

Information

* Subject Name

* No. of modules

* Rating

* Priority

* Category

* Level

Instructor Name

Fields & Relationships

11 Items, Sorted by Field Label

Q Quick Find Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|-------------------|-------------------------|-------------------|-------------------------------------|
| Category | Category_c | Text(50) | | <input type="checkbox"/> |
| Created By | CreatedById | Lookup(User) | | <input type="checkbox"/> |
| Instructor Name | Instructor_Name_c | Lookup(Instructor Name) | | <input checked="" type="checkbox"/> |
| Last Modified By | LastModifiedById | Lookup(User) | | <input type="checkbox"/> |
| Level | Level_c | Picklist | | <input type="checkbox"/> |
| No. of modules | No_of_modules_c | Number(2, 0) | | <input type="checkbox"/> |
| Owner | OwnerId | Lookup(User,Group) | | <input checked="" type="checkbox"/> |
| Priority | Priority_c | Picklist | | <input type="checkbox"/> |
| Rating | Rating_c | Picklist | | <input type="checkbox"/> |
| Subject Name | Subject_Name_c | Text(50) | | <input type="checkbox"/> |
| Subject Name | Name | Text(80) | | <input checked="" type="checkbox"/> |

Course Lead Object



New Course Lead

Information

* First Name

* Last Name

* Phone

* Email

Course Lead ID

Source

Available

- Employee referral
- Other
- Partner
- Partner referral

Chosen

Category: --None--

Rating: --None--

* Currency: USD (\$)

* Course Lead Amount

Buttons: Cancel, Save & New, Save

Fields & Relationships

13 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|--------------------|----------------------|-------------------------|-------------------|---------|
| Category | Category_c | Picklist | | |
| Course Lead Amount | Course_Lead_Amount_c | Currency(16, 2) | | |
| Course Lead ID | Name | Auto Number | | ✓ |
| Created By | CreatedById | Lookup(User) | | |
| Currency | Currency_c | Picklist | | |
| Email | Email_c | Email | | |
| First Name | First_Name_c | Text(20) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Last Name | Last_Name_c | Text(30) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Phone | Phone_c | Phone | | |
| Rating | Rating_c | Picklist | | |
| Source | Source_c | Picklist (Multi-Select) | | |

Technology Object



New Technology

Information

* Technology Name

Active

Type

Learning Management System (LMS) ▼

* Rating

--None-- ▼

* Category

--None-- ▼

Cancel

Save & New

Save

Fields & Relationships

9 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Active | Active_c | Checkbox | | ▼ |
| Category | Category_c | Picklist | | ▼ |
| Created By | CreatedById | Lookup(User) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Name | Name_del_c | Text(75) | | ▼ |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Rating | Rating_c | Picklist | | ▼ |
| Technology Name | Name | Text(80) | | ✓ |
| Type | Type_c | Picklist | | ▼ |

Instructor Name Object



New Instructor Name

Information

* Instructor Name

Qualifications

Mobile

Availability ⓘ

Email

Fields & Relationships

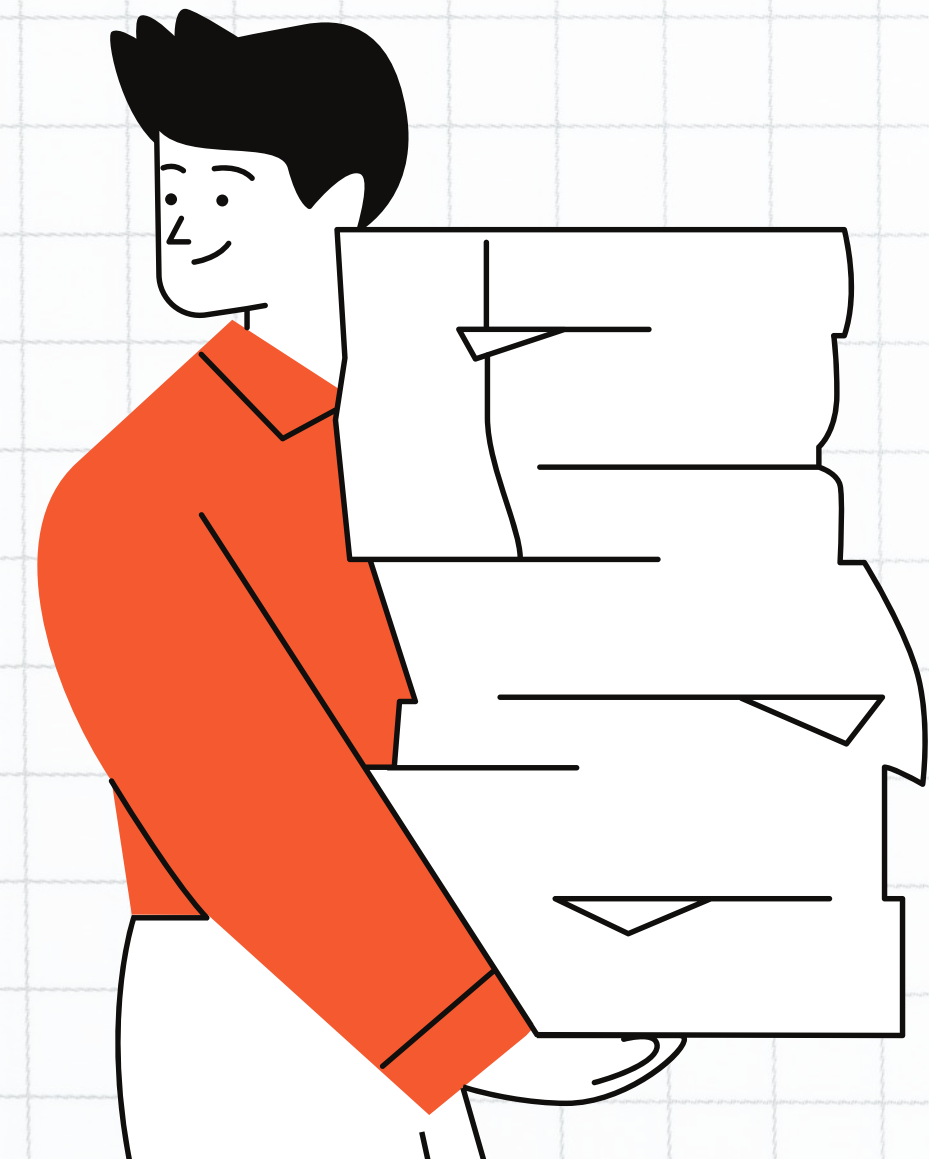
8 Items, Sorted by Field Label

Q Quick Find Deleted Fields Field Dependencies Set History Tracking

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|-----------------------|-------------------|---------|
| Availability | Availability_c | Text Area(255) | | ▼ |
| Created By | CreatedById | Lookup(User) | | |
| Email | Email_c | Email | | ▼ |
| Instructor Name | Name | Text(80) | | ✓ ▼ |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Mobile | Mobile_c | Phone | | ▼ |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Qualifications | Qualifications_c | Long Text Area(32768) | | ▼ |

Validation Rules

The purpose of these validation rules is to verify data.



How To Create A Validation Rule

Validation rules checks that specific fields are not left blank based on criteria to ensure data is correct

1
Validation Rule for Course Name Field in Course Object

2
Click Setup icon

3
Navigate to Object Manager

4
Type in name of object. For this one, it was Course.

5
Go to Validation Rule > New.

6
Fill out required fields > Save.

The screenshot shows the Salesforce Setup interface. The browser address bar displays 'mtbfacademy-dev-ed.develop.lightning.force.com'. The page title is 'Course | Salesforce'. The navigation menu includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'SETUP > OBJECT MANAGER Course'. On the left sidebar, there are links for 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The main content area shows the 'Course Validation Rule' configuration page. The 'Validation Rule Edit' section includes a 'Rule Name' field with the value 'Validates_Course_Name_Field', an 'Active' checkbox checked, and a 'Description' field with the text 'Validates that Course Name field is provided.'. Below this is the 'Error Condition Formula' section, which includes an 'Example' field with the formula 'Discount_Percent_c>0.30' and a 'More Examples...' link. The 'Error Condition Formula' section also includes an 'Error Message' field and an 'Error Condition Formula' field. The 'Functions' section includes a dropdown menu for 'All Function Categories' and a list of functions: ABS, ACOS, ADDMONTHS, and AND.

How To Create A Validation Rule (Contd.)

Validation Rule for Course Name Field in Course Object

1

Click Setup icon

2

Navigate to Object Manager

The screenshot shows the Salesforce Object Manager interface for creating a validation rule. On the left is a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main area is divided into two panes. The left pane contains a text editor with the formula: `OR (ISBLANK (Course_Name__c))`. Below the editor is a 'Check Syntax' button and the text 'No errors found'. The right pane shows a list of functions: ADDMONTHS, AND, ASCII, ASIN, and ABS(number). The 'ABS(number)' function is selected, and its description is shown: 'Returns the absolute value of a number, a number without its sign'. Below the function list is an 'Insert Selected Function' button and a 'Help on this function' link. At the bottom of the main area, there is an 'Error Message' section. It includes an 'Example' field with the text 'Discount percent cannot exceed 30%'. Below this, it states 'This message will appear when Error Condition formula is true'. There is a text input field for the error message containing 'Please enter Course Name.'. At the bottom, there is an 'Error Location' section with radio buttons for 'Top of Page' (selected), 'Field', and 'Active', along with a '+' icon and an 'i' icon.

Type in name of object. For this one, it was Course.

3

Go to Validation Rule > New.

4

Fill out required fields > Save.

5

Keeping the language as simple as possible helps.

All Validation Rules for Course Object

The screenshot shows the Salesforce Setup interface for the Course object. The navigation menu on the left includes: 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; and Validation Rules (highlighted). The main content area displays the Validation Rules for the Course object, listing 10 rules sorted by name. Each rule includes its name, the field it applies to, the validation message, and its status (Active).

SETUP > OBJECT MANAGER
Course

Validation Rules

10 Items, Sorted by Rule Name

| Rule Name | Field | Message | Status |
|---|-----------------|-------------------------------|--------|
| Validates_Active_Field | Active | Please check Active. | ✓ |
| Validates_Course_Duration_Field | Course duration | Please enter Course Duration. | ✓ |
| Validates_Course_Name_Field | Course Name | Please enter Course Name. | ✓ |
| Validates_End_Date_Field | End date | Please enter End Date. | ✓ |
| Validates_Instructor_Name_Field | Instructor Name | Please enter Instructor Name. | ✓ |
| Validates_No_of_Modules_Is_Provided | No. of modules | Please enter No. of Modules | ✓ |
| Validates_Priority_Field | Priority | Please select Priority. | ✓ |
| Validates_Rating_Field | Rating | Please select Rating. | ✓ |
| Validates_Start_Date_Field | Start date | Please enter Start Date. | ✓ |
| Validates_Type_Of_Course_Field | Type of course | Please enter Type of Course. | ✓ |

All Validation Rules for Subject Object

The screenshot shows the Salesforce Setup interface for the Subject object. The breadcrumb trail is 'SETUP > OBJECT MANAGER' and the object name 'Subject' is displayed. A left-hand navigation menu lists various setup options, with 'Validation Rules' selected. The main content area displays a table of 7 validation rules for the Subject object, sorted by rule name. Each rule includes its name, the error location, the error message, and its active status.

| RULE NAME | ERROR LOCATION | ERROR MESSAGE | ACTIVE |
|---|-----------------|-------------------------------|--------|
| Validates_Category_Field | Category | Please enter Category. | ✓ |
| Validates_Instructor_Name_Field | Instructor Name | Please enter Instructor Name. | ✓ |
| Validates_Level_Field | Level | Please select Level. | ✓ |
| Validates_No_of_Modules_Field | No. of modules | Please enter No. of Modules | ✓ |
| Validates_Priority_Field | Priority | Please select Priority. | ✓ |
| Validates_Rating_Field | Rating | Please select Rating. | ✓ |
| Validates_Subject_Name_Field | Subject Name | Please enter Subject Name. | ✓ |

All Validation Rules for Course Leads Object

The screenshot shows the Salesforce Setup interface for the Course Lead object. The navigation menu on the left includes: 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; and Validation Rules (highlighted). The main content area displays the Validation Rules section for Course Lead, showing 9 items sorted by Rule Name. The table below lists these rules.

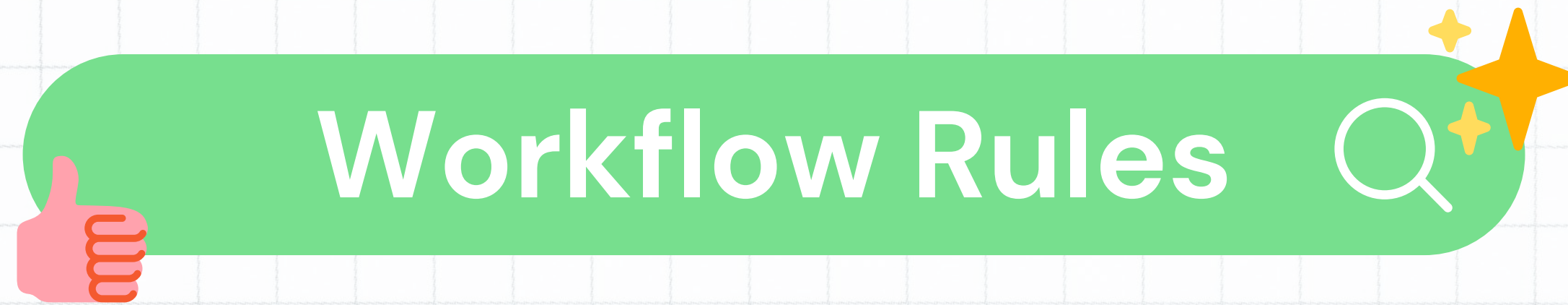
| RULE NAME | ERROR LOCATION | ERROR MESSAGE | ACTIVE |
|--|--------------------|----------------------------------|--------|
| Validates_Category_Field | Category | Please select Category. | ✓ |
| Validates_Course_Lead_Amount_Field | Course Lead Amount | Please enter Course Lead Amount. | ✓ |
| Validates_Currency_Field | 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

The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below it, the navigation menu includes "Setup", "Home", and "Object Manager". The "Object Manager" section is expanded to show "Technology". The left sidebar contains a list of configuration options, with "Validation Rules" selected. The main content area displays the "Validation Rules" for the Technology object, showing 5 items sorted by Rule Name. The table below lists these rules with their names, error locations, error messages, and active status.

| RULE NAME | ERROR LOCATION | ERROR MESSAGE | ACTIVE |
|--|----------------|-------------------------|--------|
| Validates_Active_Field | Active | Please check Active. | ✓ |
| Validates_Category_Field | Category | Please select Category. | ✓ |
| Validates_Name_Field | Name | Please enter Name. | ✓ |
| Validates_Rating_Field | Rating | Please select Rating. | ✓ |
| Validates_Type_Field | Type | Please select Type. | ✓ |

Workflow Rules



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



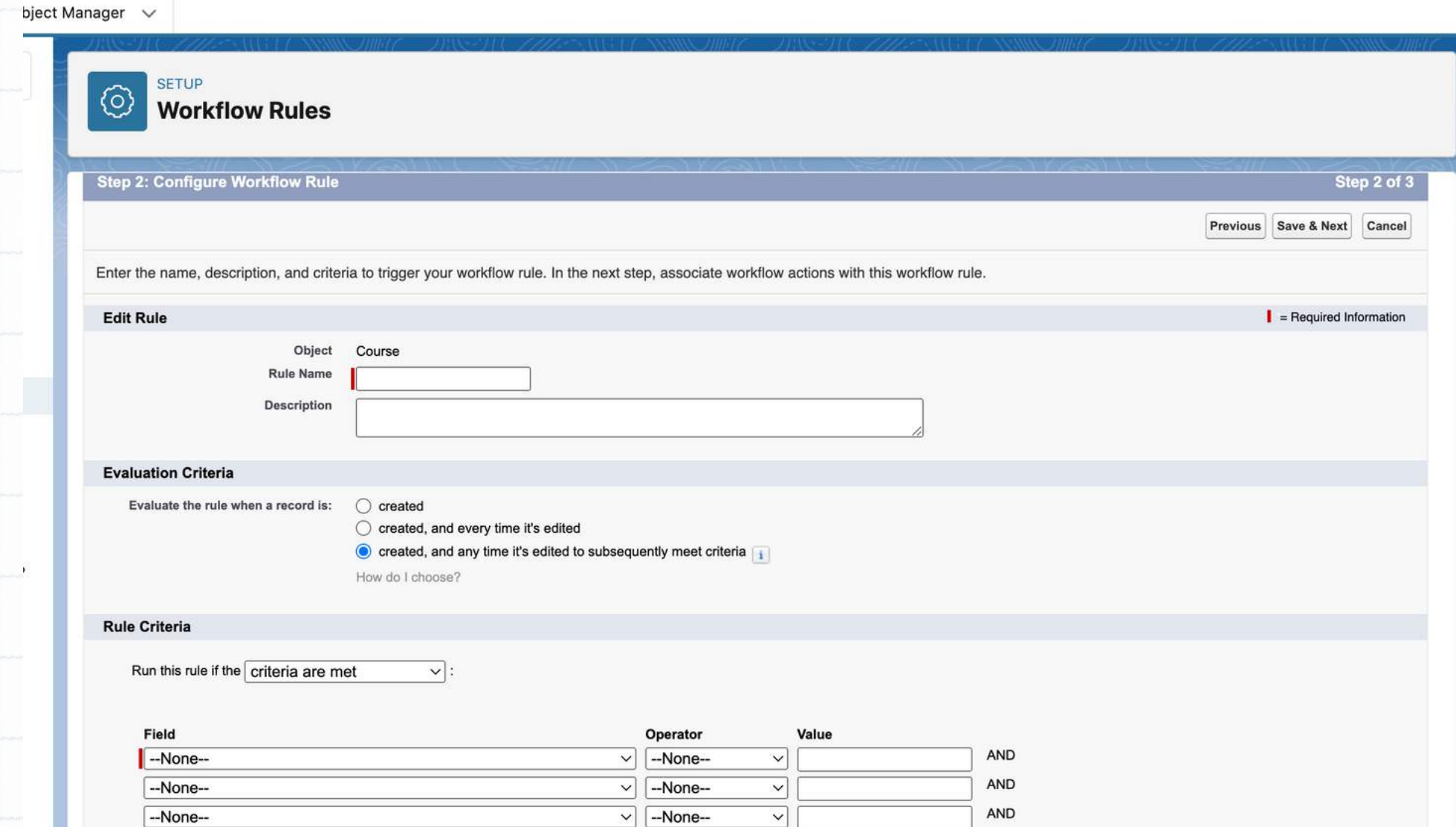
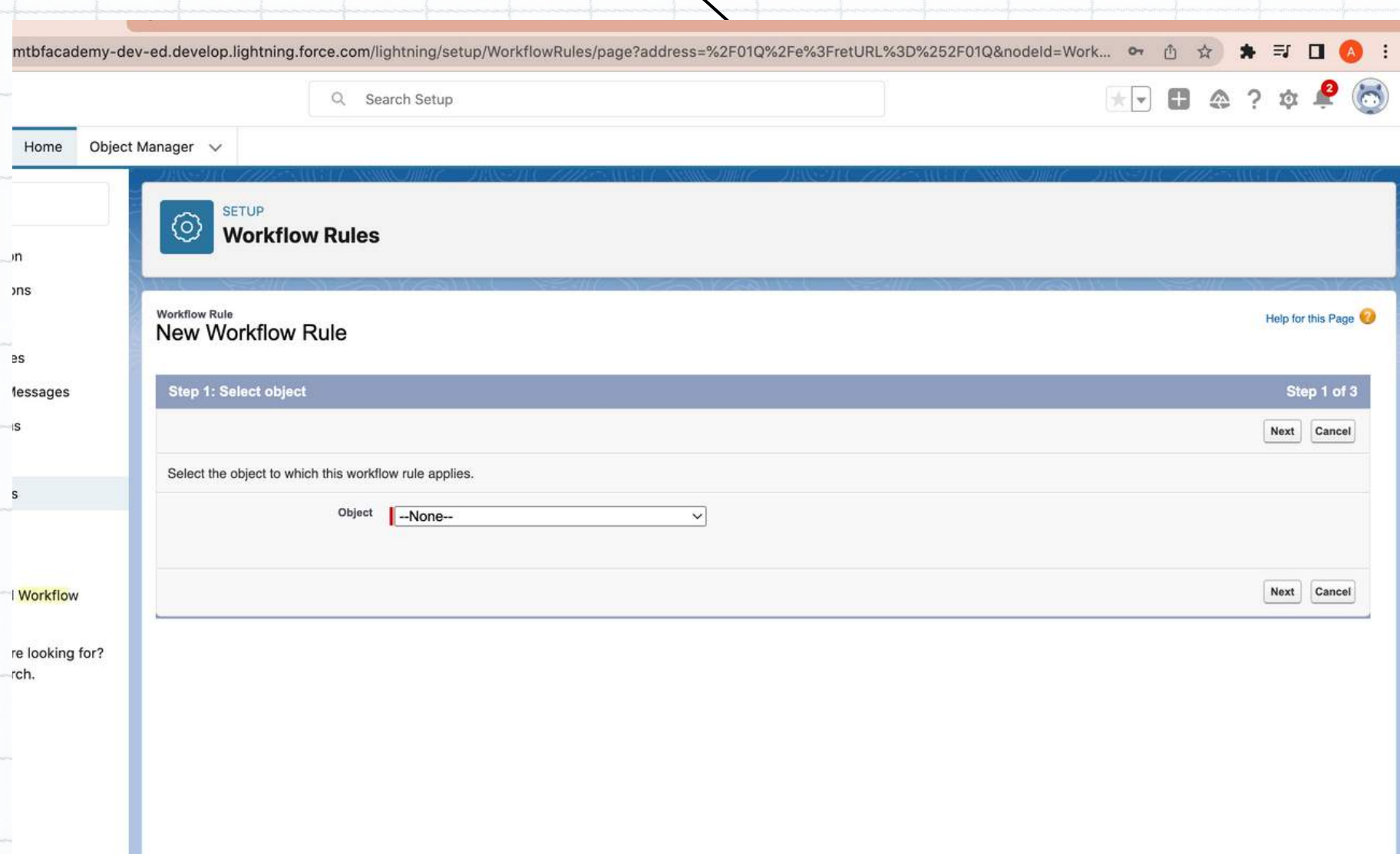
How To Create A Workflow Rule

Workflow rules checks solidified rules created by the user to maintain the criteria set base on future changes to the account.

1
Go to Workflow Rule > New.
Select Object

2
Navigate to Setup

3
Fill out required fields > Save.



Course Workflow Rule

Workflow rules for Course: The course should have an even amount of modules per section.

The screenshot shows the Salesforce Setup interface for a Workflow Rule. The page title is "High Priority + # of Course Modules". A yellow banner at the top of the main content area provides information about Flow Builder. Below this, the "Workflow Rule Detail" section contains a table with the following information:

| | | | |
|---------------|---|---------------------|--|
| Rule Name | High Priority + # of Course Modules | Object | Course |
| Active | <input type="checkbox"/> | Evaluation Criteria | Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria |
| Description | The Course should have an even amount of modules per section. | | |
| Rule Criteria | Course: No. of modules EQUALS 10 | | |
| Created By | Leslie Lloyd, 10/31/2022, 5:40 AM | Modified By | Leslie Lloyd, 10/31/2022, 5:42 AM |

Below the details, the "Workflow Actions" section is empty, with a message: "No workflow actions have been added." A yellow banner at the bottom of the page states: "No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined."

Workflow rules for Subject:
Subject category should be 10
items overall on the web.

Subject Workflow Rules

The screenshot shows the Salesforce Setup interface for configuring a workflow rule. The breadcrumb trail is Setup > Home > Object Manager > Workflow Rules. The page title is "Edit Rule High Priority + Subject Category and # of Modules". The current step is "Step 3: Specify Workflow Actions".

Rule Criteria: (Subject: No. of modules LESS OR EQUAL 10) AND (Subject: Category CONTAINS Web) AND (Subject: Priority EQUALS High)

Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions: No workflow actions have been added. [Add Workflow Action](#)

Time-Dependent Workflow Actions: [See an example](#)

Message: No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined. [Add Time Trigger](#)

Workflow rules for Course Lead:
Course Lead must have a high rating
and an email attached.

Course Lead Workflow Rules

The screenshot shows the Salesforce Setup interface for editing a workflow rule. The breadcrumb trail is Setup > Home > Object Manager > Workflow Rules. The search bar contains 'workflow rules'. The left sidebar shows 'Process Automation' > 'Workflow Rules'. The main content area is titled 'Edit Rule High Priority + Course Lead' and is on 'Step 3 of 3: Specify Workflow Actions'. The rule criteria are '(Course Lead: Rating GREATER OR EQUAL 5) AND (Course Lead: Email CONTAINS Email)'. The evaluation criteria are 'Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria'. There are sections for 'Immediate Workflow Actions' and 'Time-Dependent Workflow Actions', both currently empty. A message at the bottom states: 'No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.'

Setup

Home Object Manager

Search Setup

workflow rules

Process Automation

Workflow Rules

Didn't find what you're looking for?
Try using Global Search.

SETUP Workflow Rules

Edit Rule High Priority + Course Lead [Help for this Page](#)

Step 3: Specify Workflow Actions Step 3 of 3 [Done](#)

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

| | |
|---------------------|--|
| Rule Criteria | (Course Lead: Rating GREATER OR EQUAL 5) AND (Course Lead: Email CONTAINS Email) |
| Evaluation Criteria | Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria |

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.

[Add Time Trigger](#)

Workflow rules for Technology:
Technology should be rated
highly and owner should contain
an email (Course Lead)..

Technology Workflow Rules

The screenshot shows the Salesforce Setup interface for configuring a Workflow Rule. The page title is "Edit Rule High Priority + Technology Rating and Ownership". The current step is "Step 3: Specify Workflow Actions".

Rule Criteria: (Technology: Rating GREATER OR EQUAL High) AND (Technology: Owner CONTAINS Email)

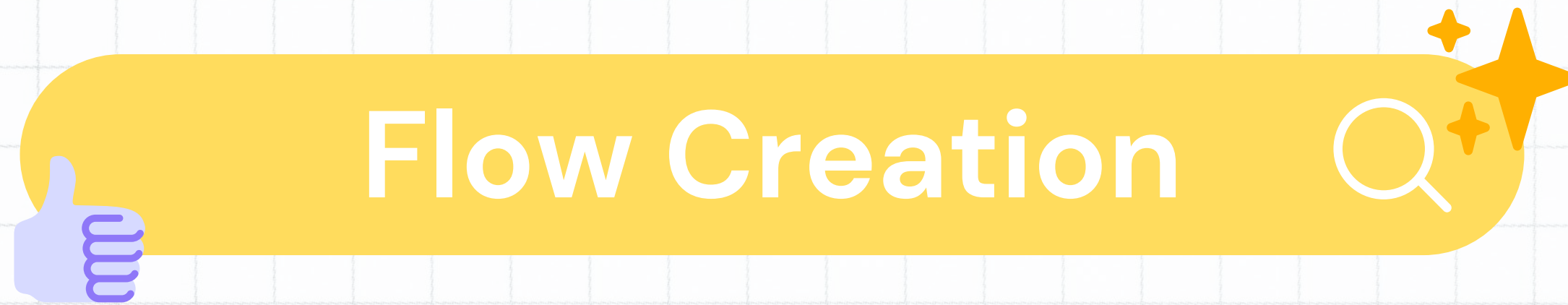
Evaluation Criteria: Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions: No workflow actions have been added. There is an "Add Workflow Action" button.

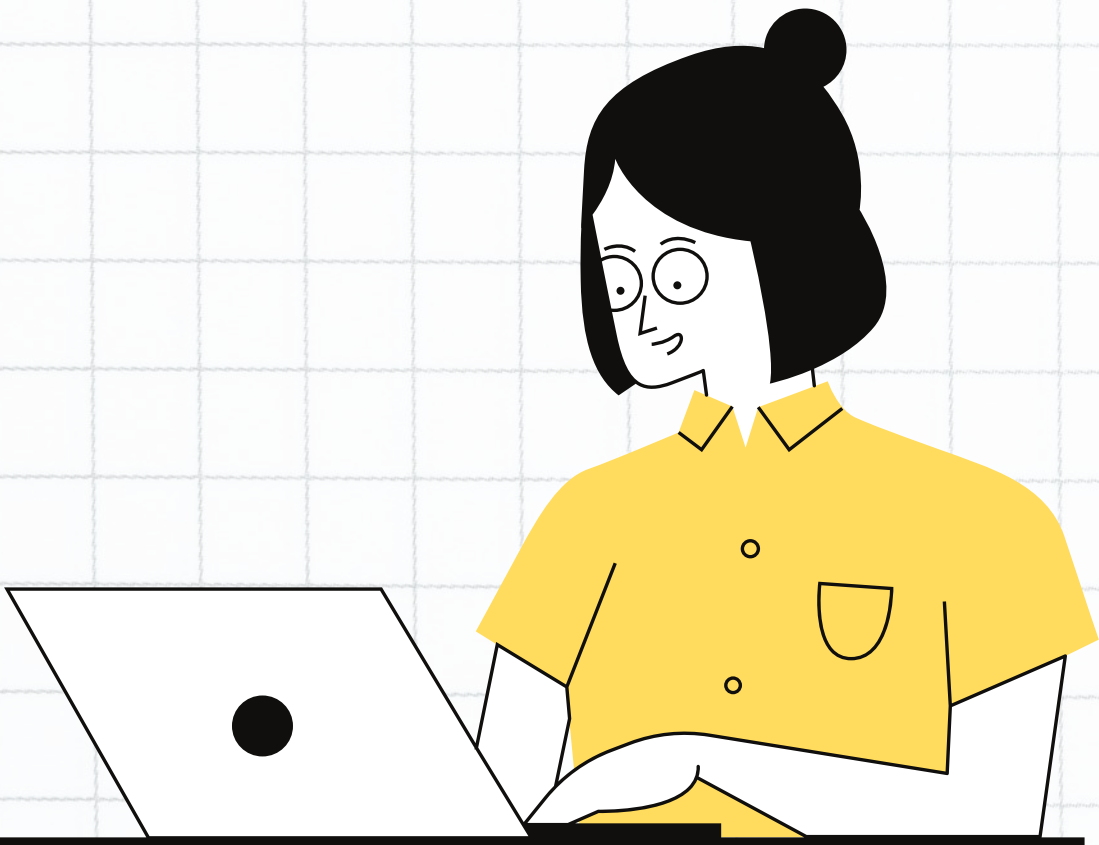
Time-Dependent Workflow Actions: There is a message: "No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined." and an "Add Time Trigger" button.

The left sidebar shows the navigation menu with "Setup", "Home", and "Object Manager". The "Process Automation" section is expanded, and "Workflow Rules" is selected. A search bar in the sidebar contains "workflow rules".

Flow Creation

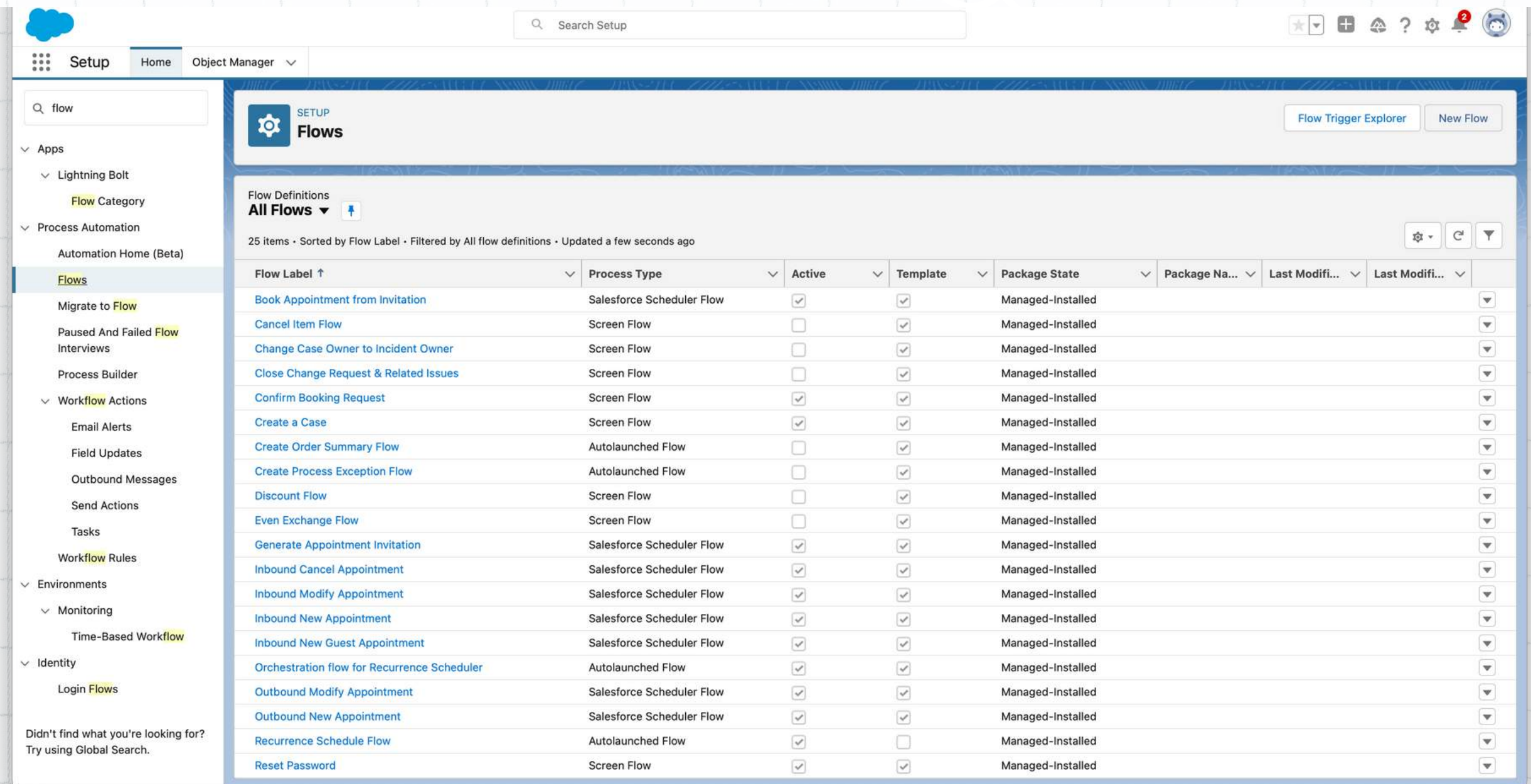


Creating a flow in the scenario that an end-user submits a Case.



Flow Creation

- 1 Type in Flows in the Quick Find Bar
- 2 Select Flows
- 3 Click on New Flow

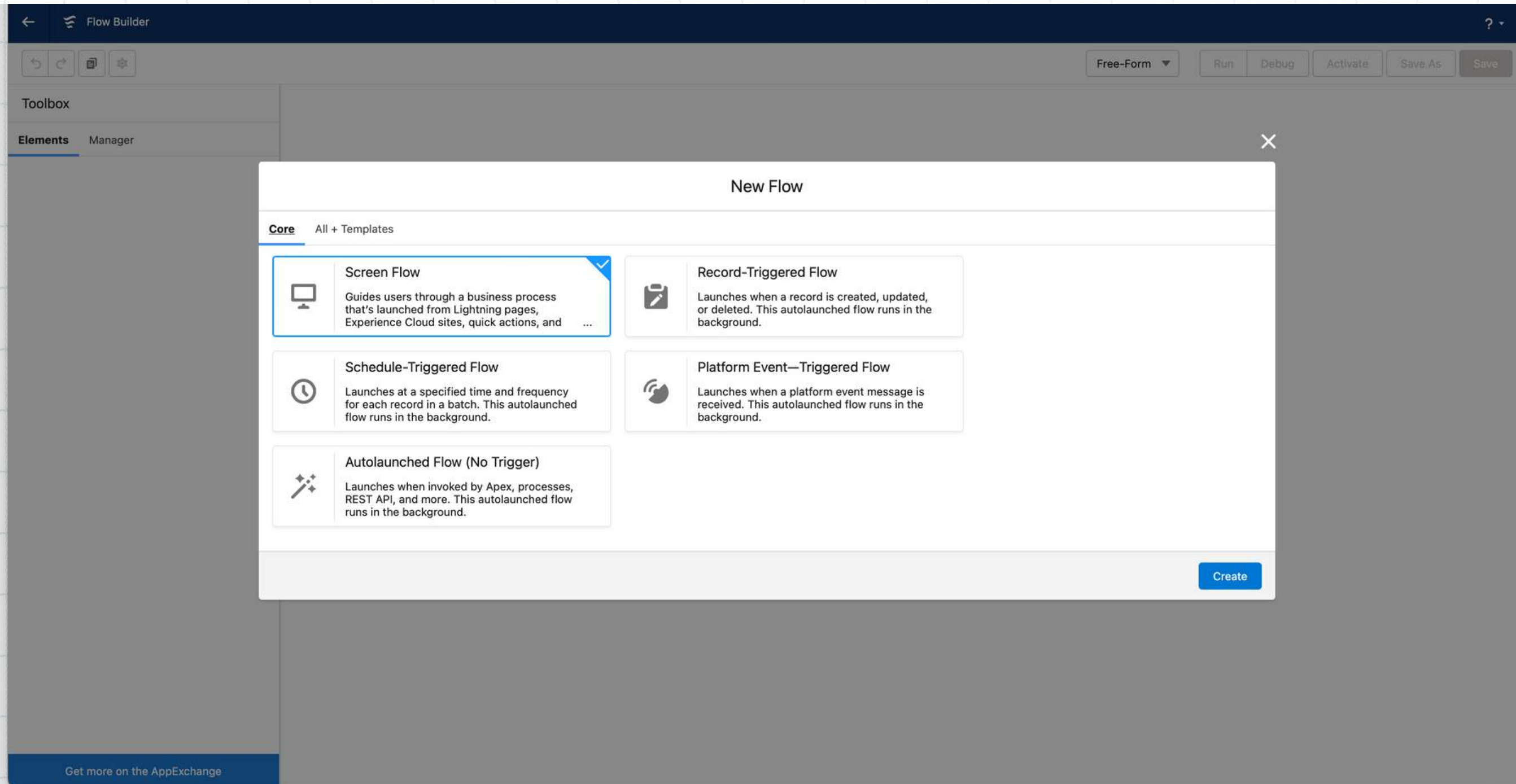


The screenshot shows the Salesforce Setup interface for the 'Flows' section. The left sidebar contains a navigation menu with categories like 'Apps', 'Process Automation', 'Workflow Actions', and 'Environments'. The 'Flows' category is selected. The main content area displays a table of flow definitions. The table has columns for 'Flow Label', 'Process Type', 'Active', 'Template', 'Package State', 'Package Na...', 'Last Modifi...', and 'Last Modifi...'. The table lists 25 items, including 'Book Appointment from Invitation', 'Cancel Item Flow', 'Change Case Owner to Incident Owner', 'Close Change Request & Related Issues', 'Confirm Booking Request', 'Create a Case', 'Create Order Summary Flow', 'Create Process Exception Flow', 'Discount Flow', 'Even Exchange Flow', 'Generate Appointment Invitation', 'Inbound Cancel Appointment', 'Inbound Modify Appointment', 'Inbound New Appointment', 'Inbound New Guest Appointment', 'Orchestration flow for Recurrence Scheduler', 'Outbound Modify Appointment', 'Outbound New Appointment', 'Recurrence Schedule Flow', and 'Reset Password'.

| Flow Label ↑ | Process Type | Active | Template | Package State | Package Na... | Last Modifi... | Last Modifi... |
|---|---------------------------|-------------------------------------|-------------------------------------|-------------------|---------------|----------------|----------------|
| Book Appointment from Invitation | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Cancel Item Flow | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Change Case Owner to Incident Owner | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Close Change Request & Related Issues | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Confirm Booking Request | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Create a Case | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Create Order Summary Flow | Autolaunched Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Create Process Exception Flow | Autolaunched Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Discount Flow | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Even Exchange Flow | Screen Flow | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Generate Appointment Invitation | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Inbound Cancel Appointment | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Inbound Modify Appointment | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Inbound New Appointment | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Inbound New Guest Appointment | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Orchestration flow for Recurrence Scheduler | Autolaunched Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Outbound Modify Appointment | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Outbound New Appointment | Salesforce Scheduler Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |
| Recurrence Schedule Flow | Autolaunched Flow | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Managed-Installed | | | |
| Reset Password | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |

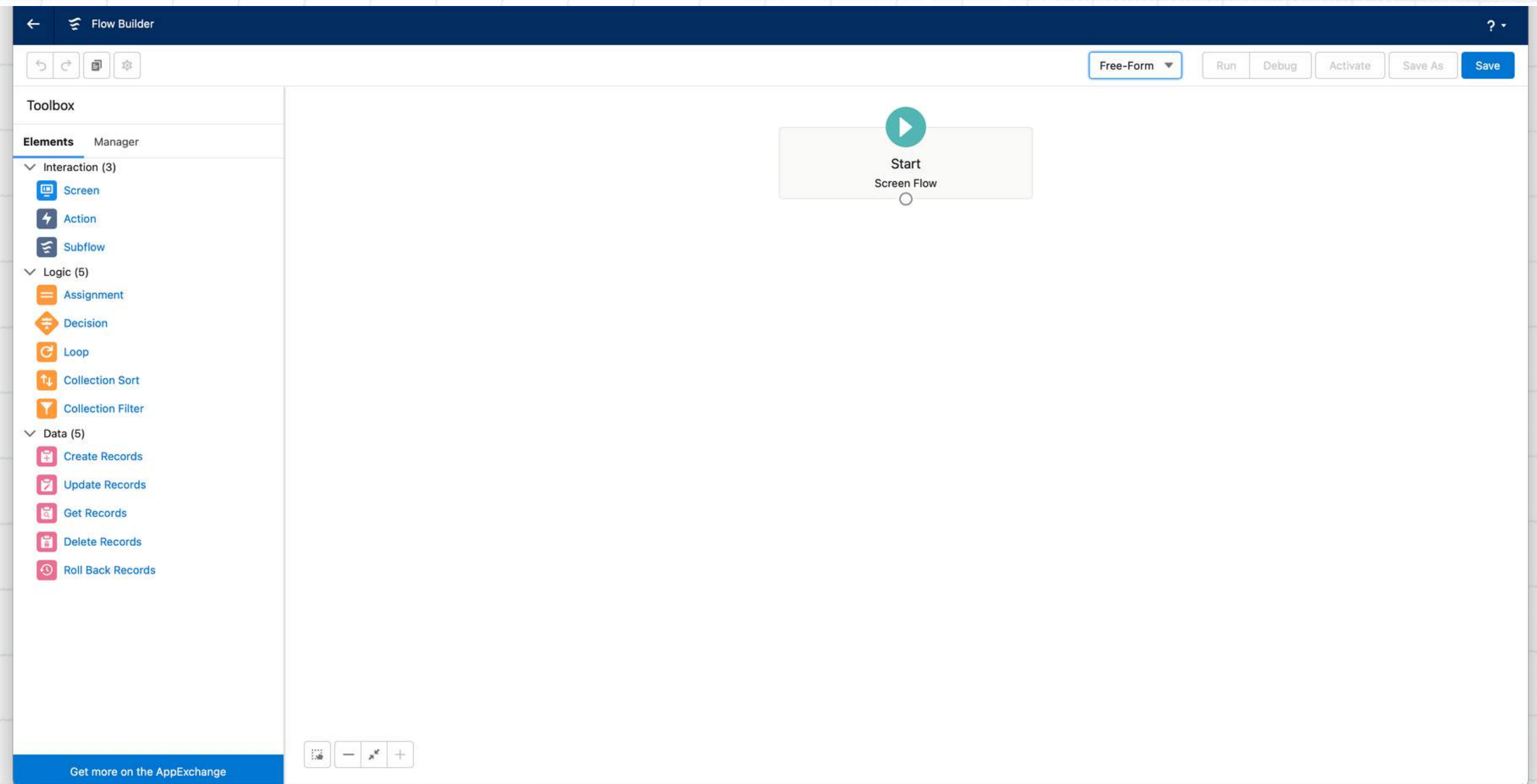
Flow Creation

4 Select Screen Flow and click Done



Flow Creation

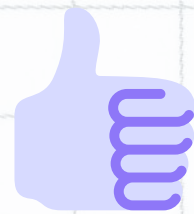
- 5 Select Form on the top right for Free-Form to have an easier layout for your Flow. Then select Screen on top left.



Flow Creation

6

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



The screenshot displays the 'New Get Records' configuration window in the Salesforce Flow Builder. The window is titled 'New Get Records' and contains the following sections:

- Find Salesforce records and store their field values in flow variables.**
 - *Label:** Get Queue
 - *API Name:** 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:** All Conditions Are Met (AND)
 - Field:** DeveloperName
 - Operator:** Equals
- Sort Group Records**
 - Sort Order:** Not Sorted
 - Note:** If you store only the first record, filter by a unique field, such as ID.

A search dropdown is open, showing the following options:

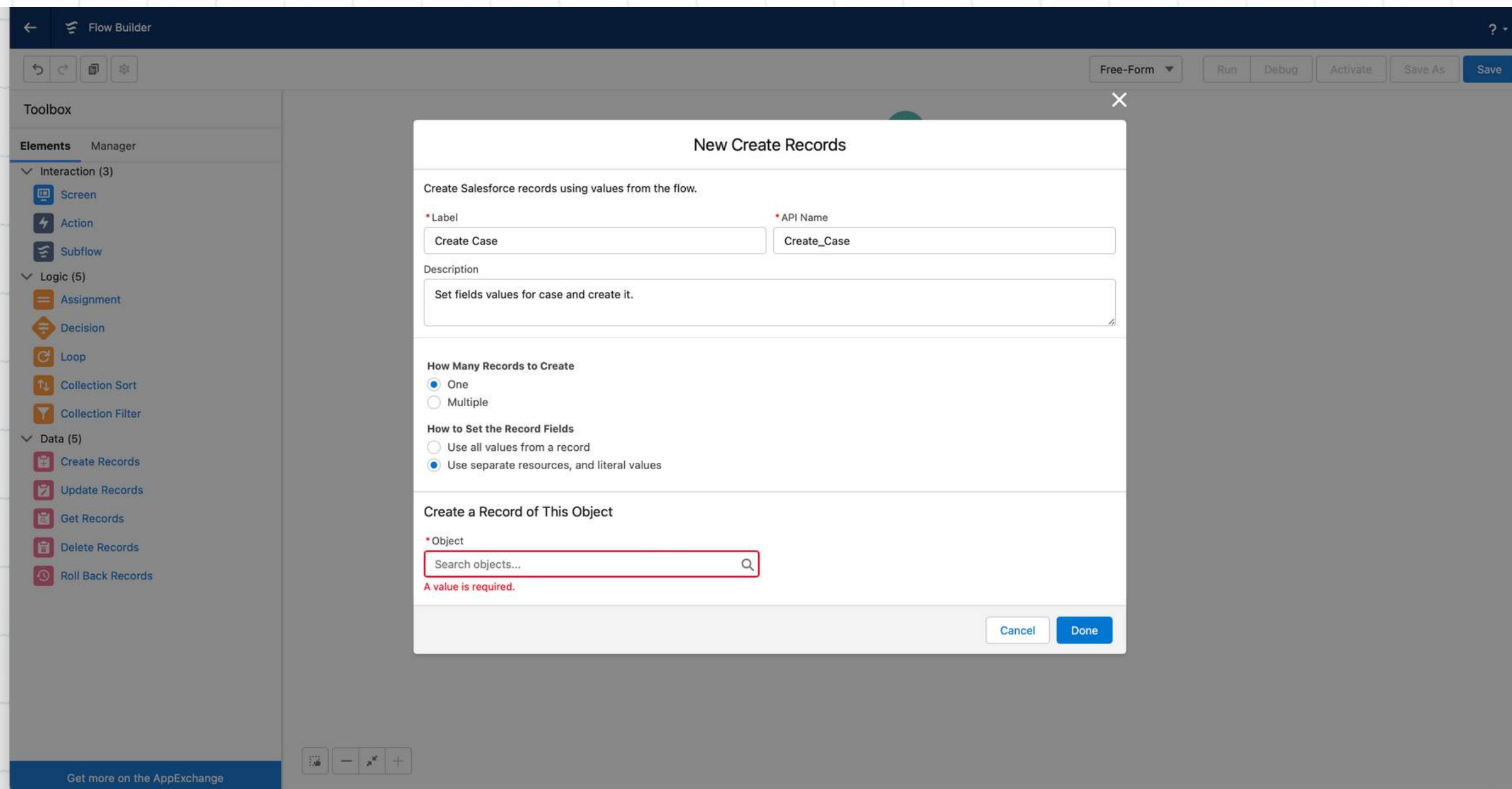
- Global Constants**
 - \$GlobalConstant.EmptyString (Equivalent to empty string (not null))
 - \$GlobalConstant.False (Equivalent to false, unchecked, or no)
 - \$GlobalConstant.True (Equivalent to true, checked, or yes)
- SCREEN COMPONENTS**
 - Course_Enrolled (Text)
 - Email (Text)
 - Instructor_Name (Text)
 - Name (Text)

The search input field contains the text 'Enter value or search resources...'. The 'Done' button is highlighted in blue.

Flow Creation

7

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.



The screenshot displays the Salesforce Flow Builder interface. On the left, the 'Toolbox' is visible, with the 'Data' section expanded to show 'Create Records' selected. The main workspace shows a 'New Create Records' dialog box. The dialog box contains the following fields and options:

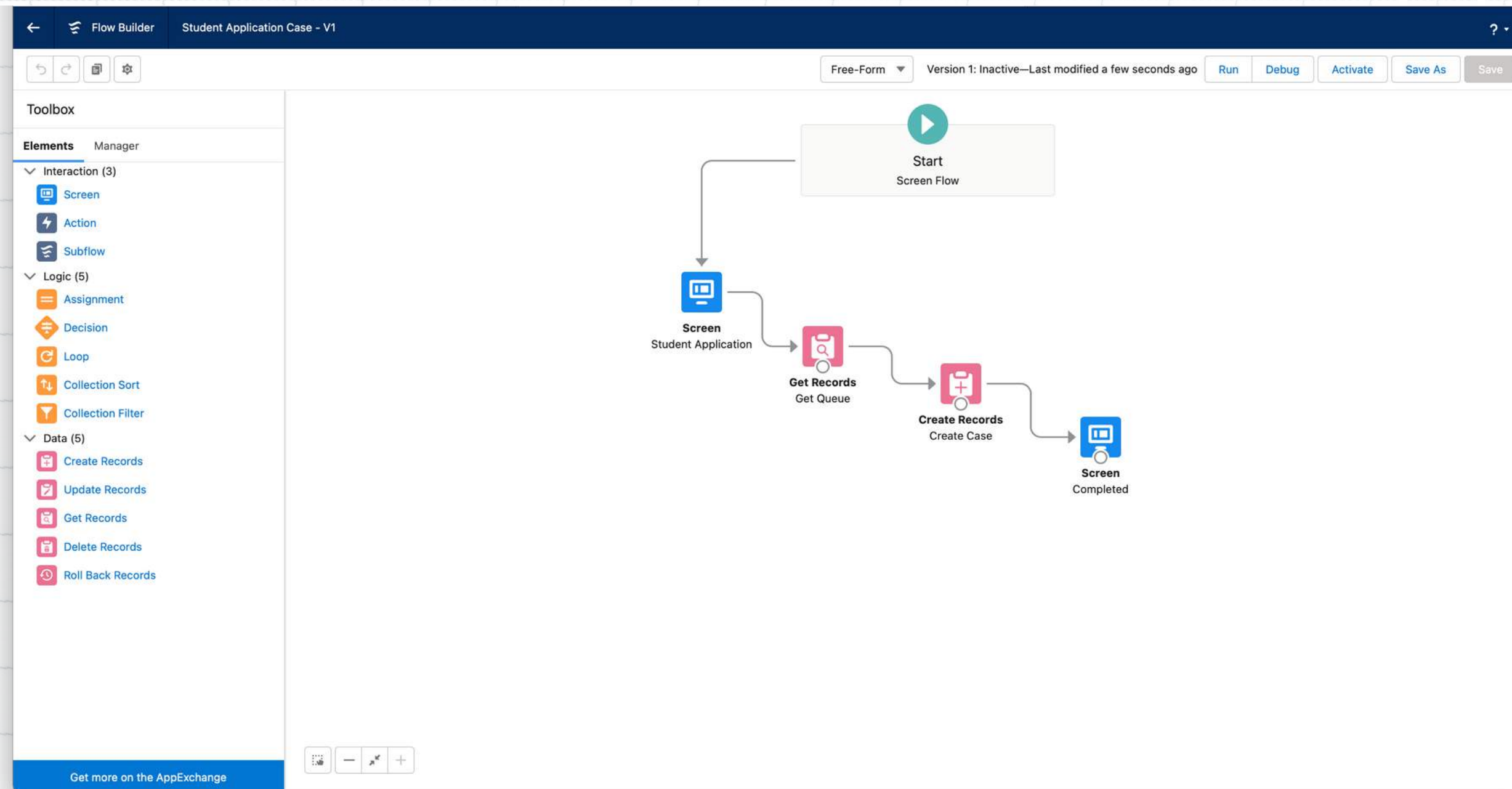
- Create Salesforce records using values from the flow.**
- *Label:** Create Case
- *API Name:** Create_Case
- Description:** Set fields values for case and create it.
- How Many Records to Create:** One (selected), Multiple
- How to Set the Record Fields:** Use separate resources, and literal values (selected)
- Create a Record of This Object:** Search objects... (with a search icon) and a red error message: 'A value is required.'

Buttons for 'Cancel' and 'Done' are located at the bottom right of the dialog box. The background interface includes a top navigation bar with 'Flow Builder', 'Free-Form', 'Run', 'Debug', 'Activate', 'Save As', and 'Save' buttons. A bottom bar contains 'Get more on the AppExchange' and zoom controls.



Flow Creation

- 8 Add another screen that will finalize the flow. Make sure to add it in your App and put it in the Utility Bar.



Flow Process

The student will type in the form and click submit. That will create a case for the Instructor to look into.



The screenshot shows the MTBF Academy web application interface. At the top, there is a navigation bar with the logo and menu items: Courses, Subjects, Course Leads, Instructor Names, Technologies, Reports, and Dashboards. A search bar is located in the top right. Below the navigation bar, the main content area is divided into two sections. On the left, there is a 'Student Application' form with the following fields: Phone Number (209-342-4810), Email (industry@mac.com), Course Enrolled (Science), Subject (Help With Chapter 2), Instructor Name (Mindy Jefferson), and Query Description (I wanted to go through Biology 101). A 'Submit' button is at the bottom of the form. On the right, there is a 'Courses Recently Viewed' section with a search bar and a message: 'You haven't viewed any Courses recently. Try switching list views.' The interface also includes various utility icons like a star, plus, home, question mark, settings, and notifications.

Flow Process

10

The student will type in the form and click submit. That will create a case for the Instructor to look into. If it needs to be escalated, you can assign it to someone higher. When completed, they will click Resolved.

The screenshot displays a web application interface for 'MTBF Academy'. At the top, there is a navigation bar with a search bar and several menu items: Courses, Subjects, Course Leads, Instructor Names, Technologies, Reports, and Dashboards. Below the navigation bar, the main content area is divided into two sections. On the left, there is a 'Student Application' form with the following fields: Phone Number (209-342-4810), Email (industry@mac.com), Course Enrolled (Science), Subject (Help With Chapter 2), Instructor Name (Mindy Jefferson), and Query Description (I wanted to go through Biology 101). A 'Submit' button is located at the bottom right of the form. On the right, there is a 'Courses Recently Viewed' section with a search bar and a message: 'You haven't viewed any Courses recently. Try switching list views.' The interface also includes a top right corner with various utility icons and a bottom left corner with a tab labeled 'Student Application'.



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?

