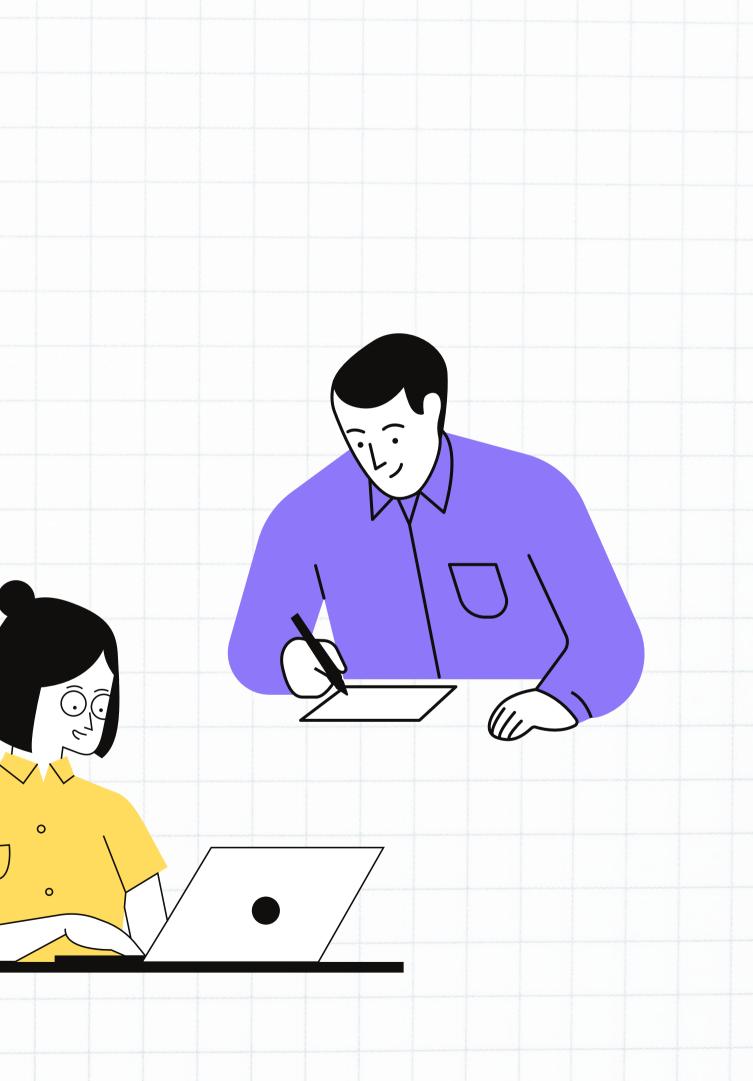
MTBF CONSULTING

# Salesforce Flow Builder Training Manual

**Capstone Project** 



# <u>Contributors</u>

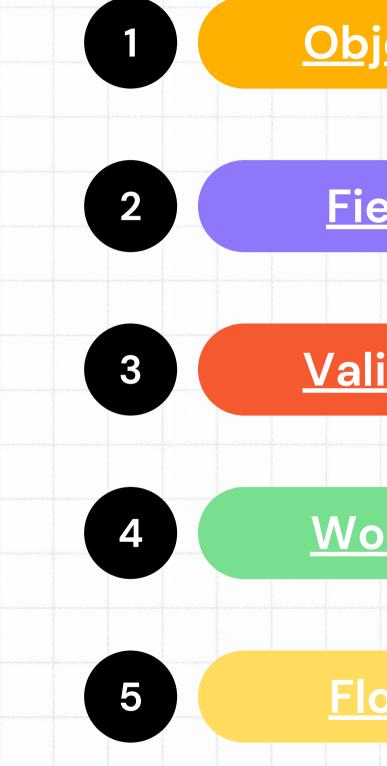
### Leslie Lloyd **Object Creation** Ellie Loo **Field Creation Validation Rules** Shantel Chambers Ashley Maxi **Workflow Rules**

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.



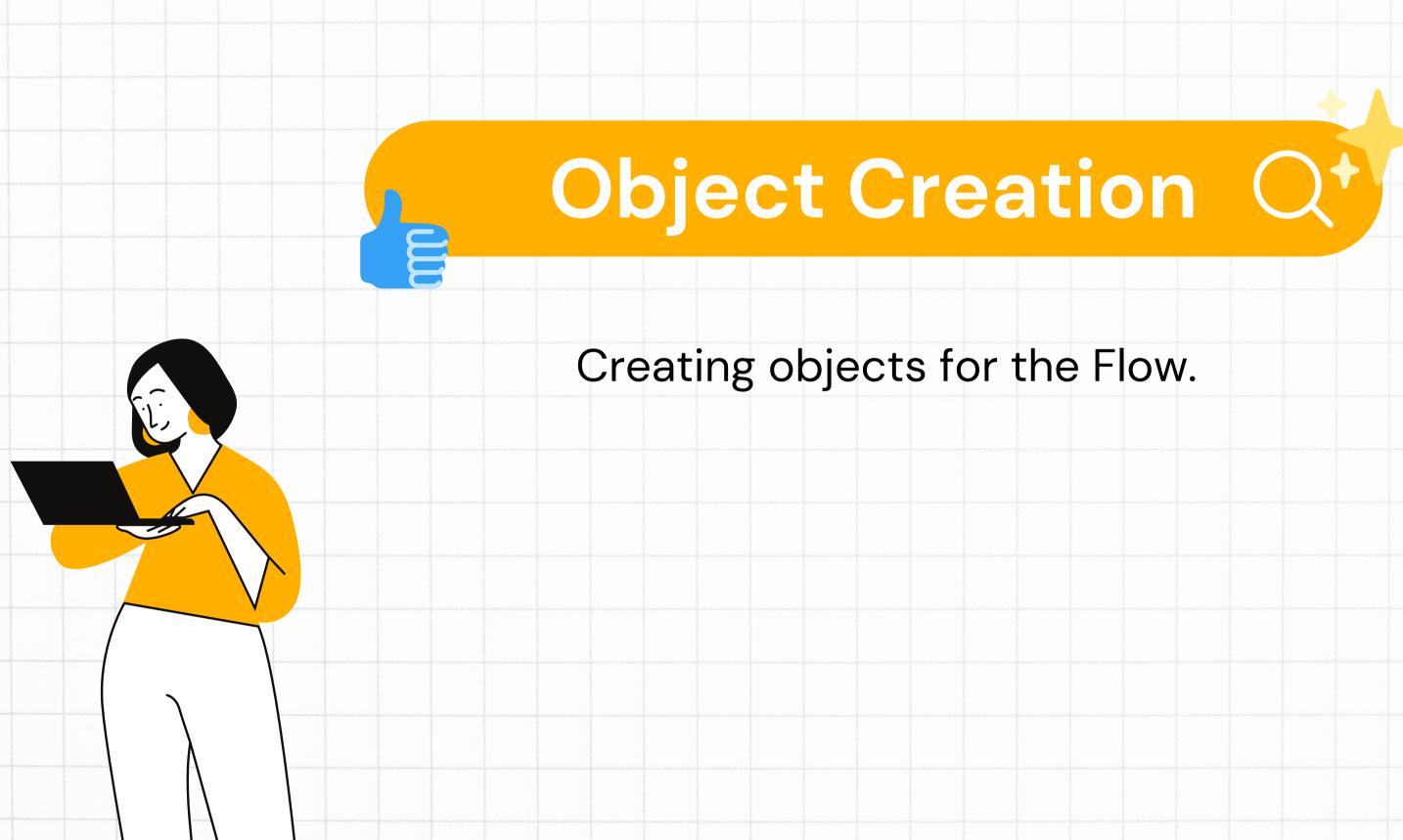
### **Object Creation**

### **Field Creation**

### **Validation Rules**

### **Workflow Rules**

### **Flow Creation**



## Create

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

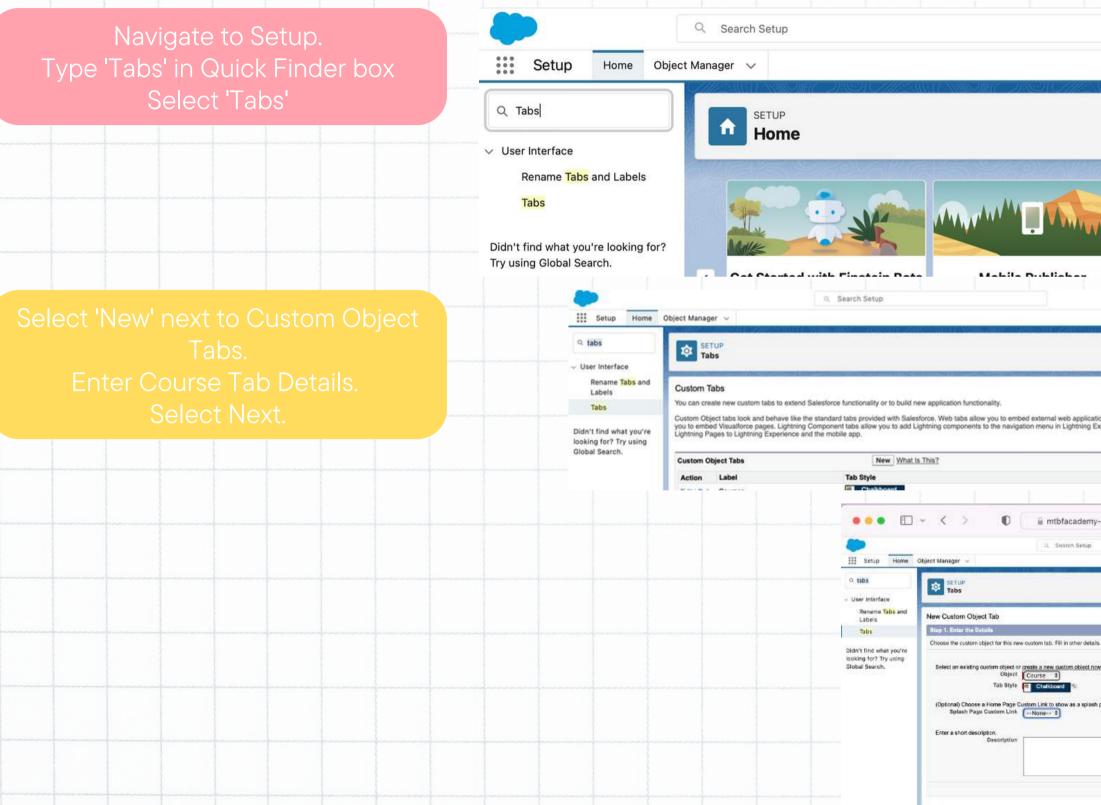
> Complete New Custom Object information for 'Course'. Select Save and New.

Repeat Steps for Custom Objects below: -Subjects

- -Course Leads
- -Technology
- -Instructor Name

	Setup     Setup     Outor Hand     Outor Hand        Outor Hand        Outor Hand        Outor Hand        Outor Hand        Outor Hand        Outor Hand        Outor Hand           Outor Hand           Outor Hand                                    Outor Hand   In outor Hand				
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## Create Tabs



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Help for this Page 📀
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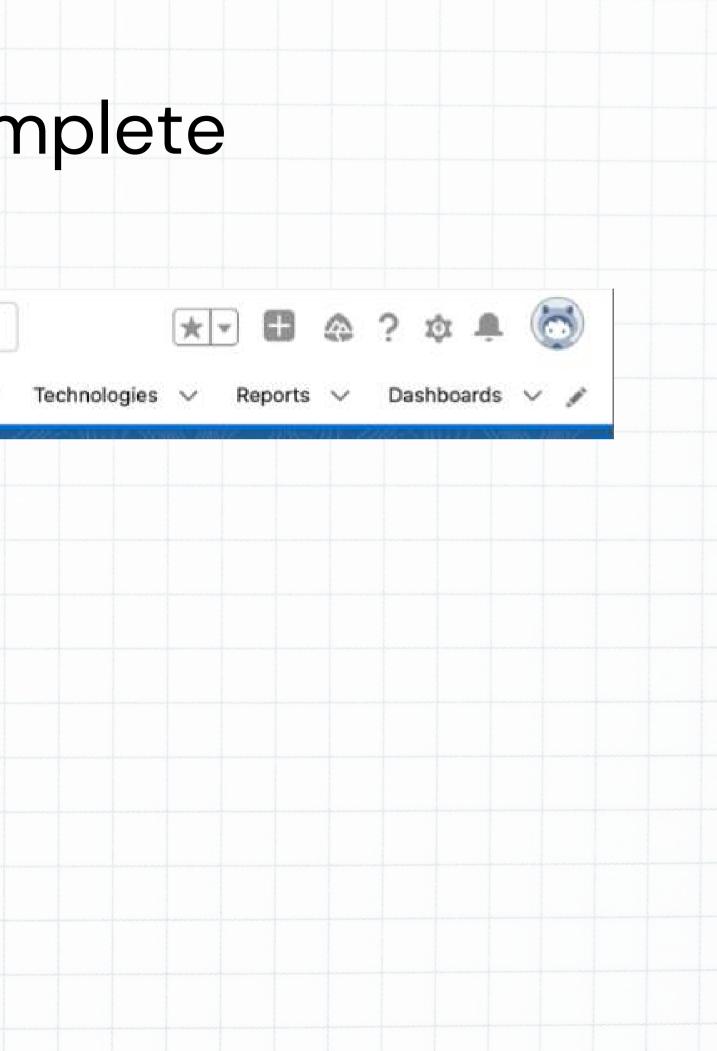
# Create Tabs (cont.)

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Add Course tab to apps. Select 'Save'.	Q. Tabs	Q Search Setup	± ■ Φ ? Φ 🤗 (
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Repeat Steps for Custom Objects: Subjects Course Leads Technology Instructor Name

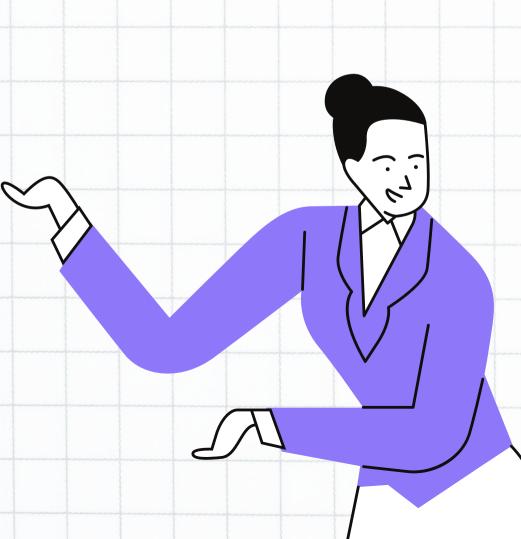
# **Custom Objects Complete** Q Search... MTBF Academy Subjects 🗸 Courses V Course Leads 🗸 Instructor Names 🗸

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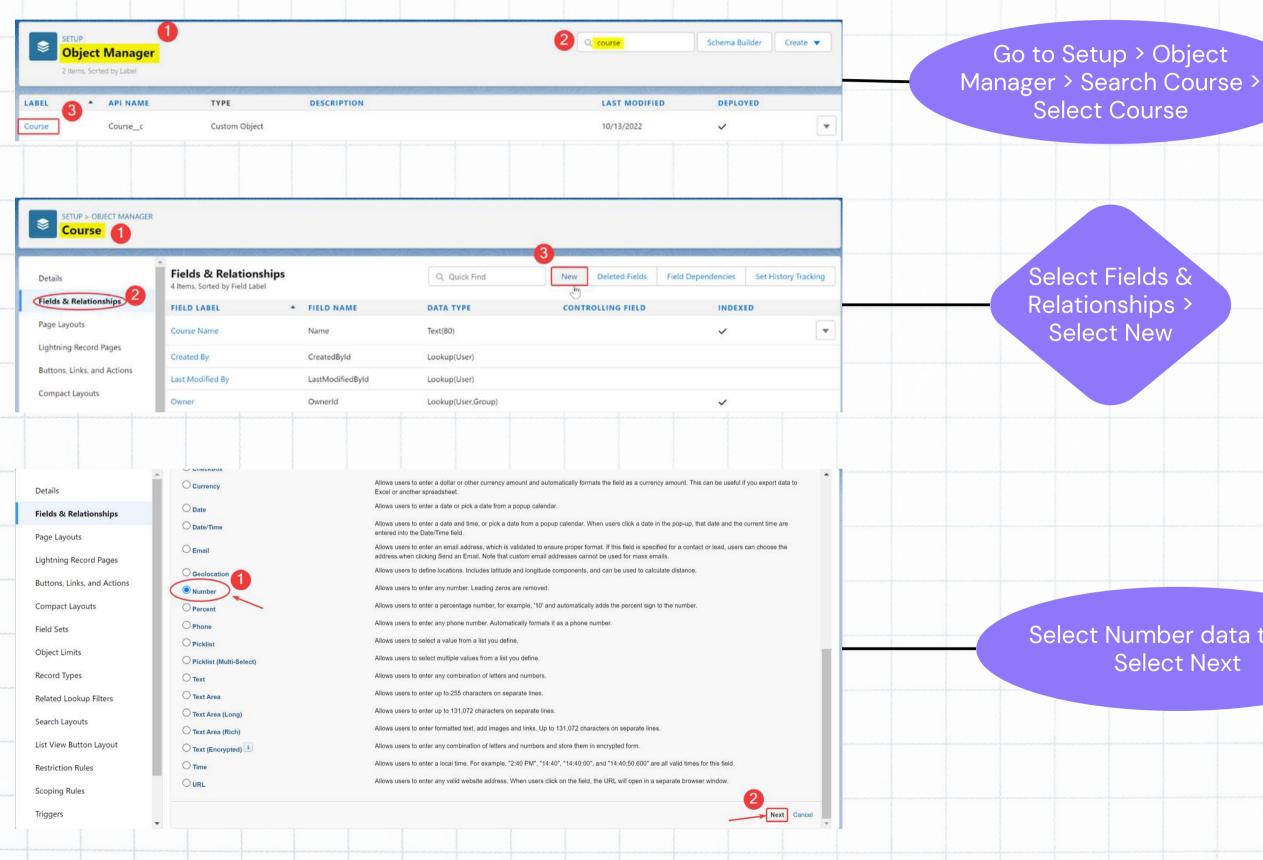
# Field Creation Q

### 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.
y User	
Previous Next Cancel	Previous Save & New Save Cancel
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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

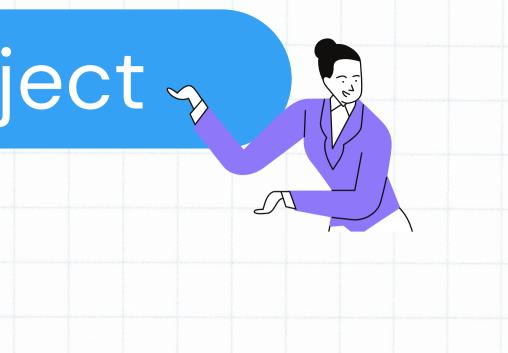
### New Subject Fields & Relationships 11 Items, Sorted by Field Label Information FIELD LABEL · FIELD NAME Category Category\_c \* Category \* Subject Name Created By CreatedByld Instructor Name Instructor\_Name\_c \*Level \* No. of modules Last Modified By LastModifiedByld --None-- $\mathbf{v}$ Level 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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t 🗠			
	Q. Quick Find New	Deleted Fields Field Dependencies Set	History Tracking
	CONTROLLING FIELD	INDEXED	•
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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		<b>v</b>
		Course Lead Amount	Course_Lead_Amount_c	Currency(16, 2)		•
	Other	Course Lead ID	Name	Auto Number		✓ <b>▼</b>
	Partner	Created By	CreatedById	Lookup(User)		
	Partner referral	Currency	Currency_c	Picklist		
	· · · · · · · · · · · · · · · · · · ·	Email	Emailc	Email		
Last Name	Category		Eman_c	Еттан		• •
	None	First Name	First_Namec	Text(20)		T
* Phone	Rating	Last Modified By	LastModifiedById	Lookup(User)		
	None	Last Name	Last_Namec	Text(30)		•
* Email	* Currency	Owner	Ownerld	Lookup(User,Group)		~
	USD (\$)	Phone	Phone_c	Phone		Y
Course Lead ID	* Course Lead Amount	Rating	Rating_c	Picklist		•
		Source	Source_c	Picklist (Multi-Select)		
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	and the second se	องการการการการการการการการการการการการการก				

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	New Technology						
rmation							
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				Picklist			
уре		Category Created By	Categoryc CreatedByld	Lookup(User)			Ľ
Learning Management System (LMS)	•	Last Modified By	LastModifiedByld	Lookup(User)			
Rating		Name	Name_del_c	Text(75)			
None	•	Owner	Ownerld	Lookup(User,Group)		~	
Calegory		Rating	Rating_c	Picklist			
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)						
bil_c	Email						,
ne	Text(80)				~	•	٢
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bile_c	Phone						•
nerld	Lookup(User,Group)				~		
lifications_c	Long Text Area(32768)						*

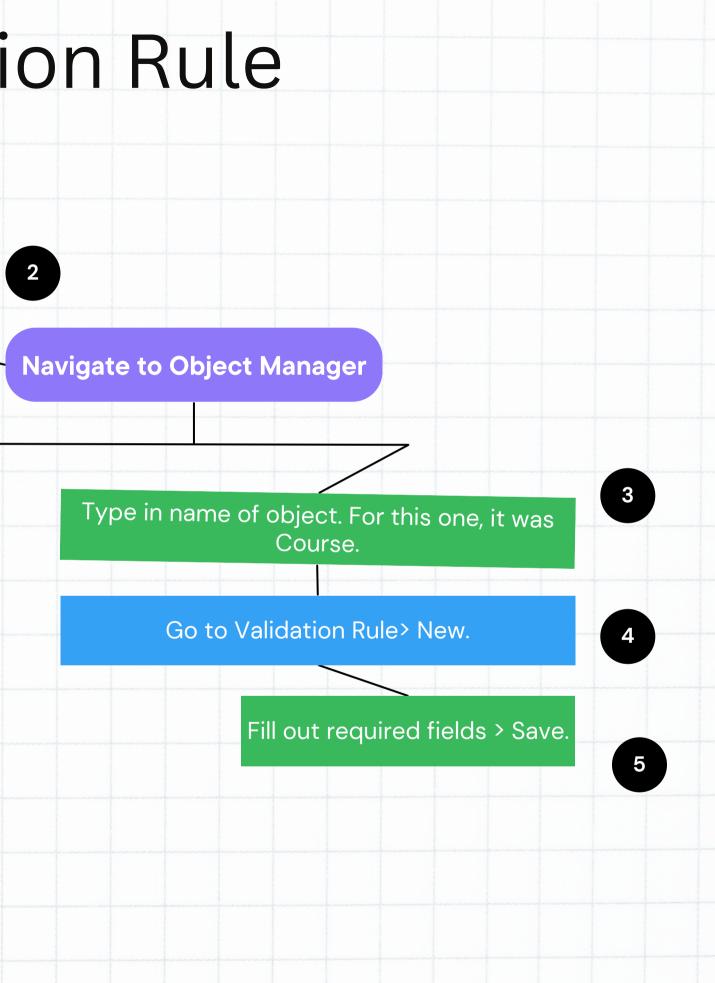
# Validation Rules Q\*

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	
SETUP > OBJECT MA Course	NAGER Course Validat Define a validation rule by s true or false. When the form Validation Rule Edit	specifying an error condition and a corresponding error message. In a expression returns true, the save will be aborted and the erro Save Save & New Cancel	The error condition is written as a Boo 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	NAGER  Course Validat  Define a validation rule by s true or false. When the form  Validation Rule Edit  Rule Name Validates_C  Active	specifying an error condition and a corresponding error message. In a expression returns true, the save will be aborted and the erro Save Save & New Cancel	The error condition is written as a Boo 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	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.	
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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.)

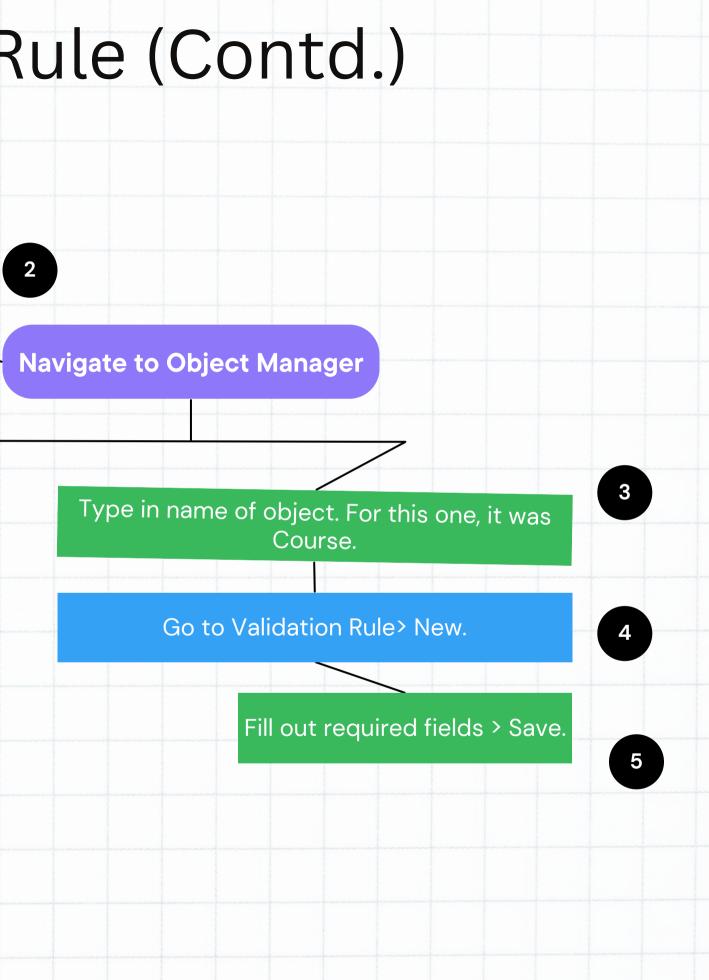
1

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

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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
Field Sets	Validates_Category_Field	Category	Please enter Category.	~
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

Home Object Manager V

Q Search Setup

SETUP > OBJECT MANAGER

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

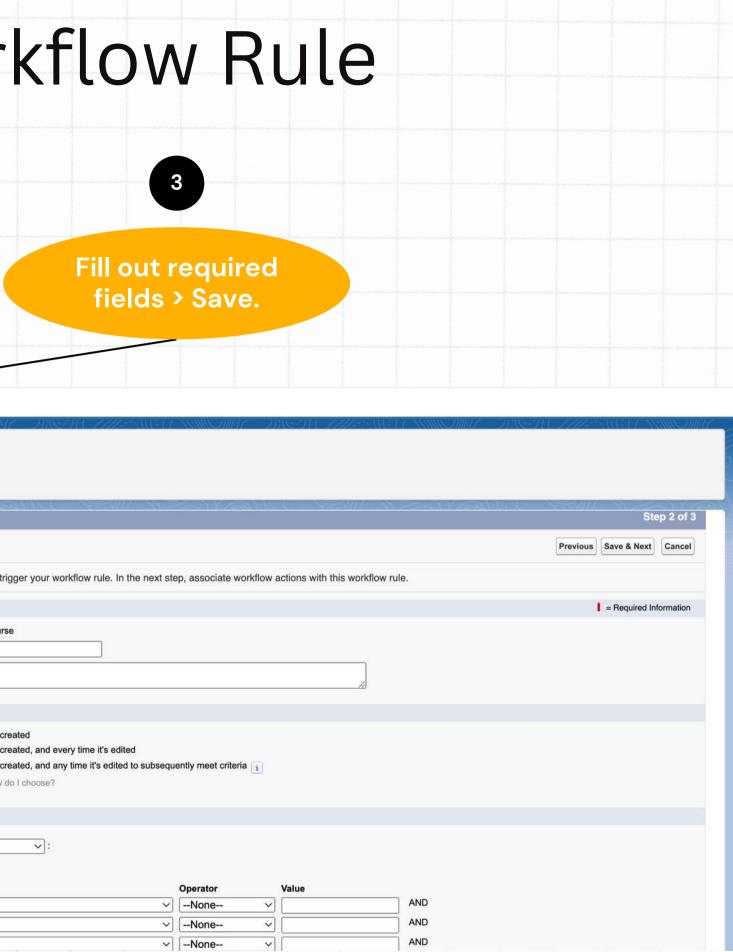
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;						
Buttons, Links, and	Validation Rules			Second Aller		
actions	5 Items, Sorted by Rule Name					
compact Layouts	RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE		
ield Sets	Validates_Active_Field	Active	Please check Active.	~		
bject Limits	Validates_Category_Field	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						
estriction Rules	Validates_Type_Field	Туре	Please select Type.	~		
coping Rules						
riggers						
low Triggers						

# Workflow Rules

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



		HOW	To Cr	oate	e A Wor
solid the crite	orkflow rules checks ified rules created by user to maintain the ria set base on future nges to the account.			Navigate to	
		low Rule> New. t Object			
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	Q Search Setup			\$ ? \$\$ <b>#</b> 👼 —	SETUP Workflow Rules
Home Object	t Manager 🗸				WORKNOW Rules
in Sins	Workflow Rules			Help for this Page 🥝	Step 2: Configure Workflow Rule Enter the name, description, and criteria to trig Edit Rule
es lessages	Step 1: Select object			Step 1 of 3	Object Course Rule Name
IS				Next	Description
s I <mark>Workflo</mark> w	Select the object to which this workflow rule applies.	<u> </u>		Next Cancel	Evaluation Criteria Evaluate the rule when a record is: Cre Cre Cre Cre How do
re looking for?					Rule Criteria
rch.				undef datafor undef datafor undef gange	Run this rule if the criteria are met FieldNoneNoneNone



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Q workflow rules	SETUP			
Process Automation	Workflow Rules	3		
Workflow Rules				
idn't find what you're looking for?	High Priority + # of Cou	urse Modules		Help for this Page 🤫
ry using Global Search.	Go with the flow! With Flow Bu automation in Flow Builder.	ilder, the future of low-code automation, you can do everything you Tell Me More   Migrate your workflow rules to flows	do with workflow rules — and more! Salesforce	e plans to retire workflow rules and recommends building
ry using Global Search.	Go with the flow! With Flow Bu automation in Flow Builder.	uilder, the future of low-code automation, you can do everything you Tell Me More Agric Antipology Migrate your workflow rules to flows	do with workflow rules — and more! Salesforc	e plans to retire workflow rules and recommends building
ry using Global Search.	Go with the flow! With Flow Bu automation in Flow Builder. Te Workflow Rule Detail	Lilder, the future of low-code automation, you can do everything you         Cell Me More       Migrate your workflow rules to flows         Edit       Delete       Clone         Activate	do with workflow rules — and more! Salesforce	e plans to retire workflow rules and recommends building
ry using Global Search.	Workflow Rule Detail Rule Name	Edit Delete Clone Activate High Priority + # of Course Modules	Object	Course
ry using Global Search.	Workflow Rule Detail	Edit Delete Clone Activate		
ry using Global Search.	Workflow Rule Detail Rule Name Active Description	Edit       Delete       Clone       Activate         High Priority + # of Course Modules         The Course should have an even amount of modules per section	Object Evaluation Criteria	Course Evaluate the rule when a record is created, and any time it's edited to
ry using Global Search.	Workflow Rule Detail Rule Name Active	Edit       Delete       Clone       Activate         High Priority + # of Course Modules         The Course should have an even amount of modules per section         Course:       No. of modules EQUALS 10	Object Evaluation Criteria	Course Evaluate the rule when a record is created, and any time it's edited to
ry using Global Search.	Workflow Rule Detail Rule Name Active Description Rule Criteria	Edit       Delete       Clone       Activate         High Priority + # of Course Modules         The Course should have an even amount of modules per section         Course:       No. of modules EQUALS 10	Object Evaluation Criteria	Course Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
ry using Global Search.	Workflow Rule Detail Rule Name Active Description Rule Criteria Created By	Edit Delete Clone Activate High Priority + # of Course Modules The Course should have an even amount of modules per section Course: No. of modules EQUALS 10 Leslie Lloyd, 10/31/2022, 5:40 AM	Object Evaluation Criteria	Course Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

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	Setup Home Object	Q Search Setup t Manager ∨	
	<ul> <li>Q workflow rules</li> <li>✓ Process Automation</li> </ul>	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
		Specify the workflow actions that will be triggered when the rule criteria are met. See an example         Rule Criteria         (Subject: No. of modules LESS OR EQUAL 10) AND (Subject: Cate         Evaluation Criteria         Evaluate the rule when a record is created, and any time it's edited to subseque	
		Immediate Workflow Actions No workflow actions have been added. Add Workflow Action	
		Time-Dependent Workflow Actions       See an example         Image: I	r defined.
		Add Time Trigger	

Workflow rules Course Lead mu and an en

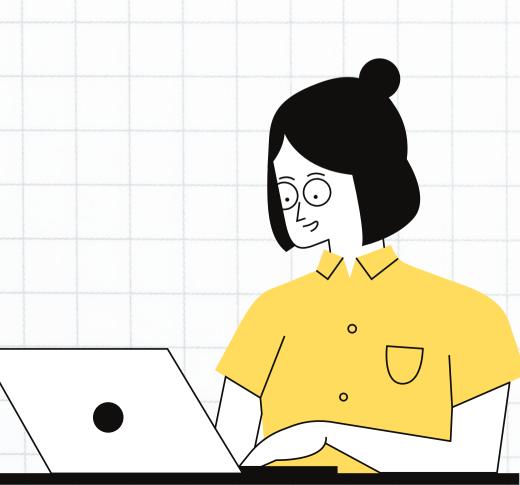
urse Lead: a high rating ched.	Course Lead Workflow Rules	
	Q Search Setup	* • • • • •
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vorkflow rules	SETUP Workflow Rules	
Workflow Rules	Edit Rule High Priority + Course Lead	Help for this Page
find what you're looking for?	Step 3: Specify Workflow 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 CriteriaEvaluate 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	
	Add Workflow Action 🔻	

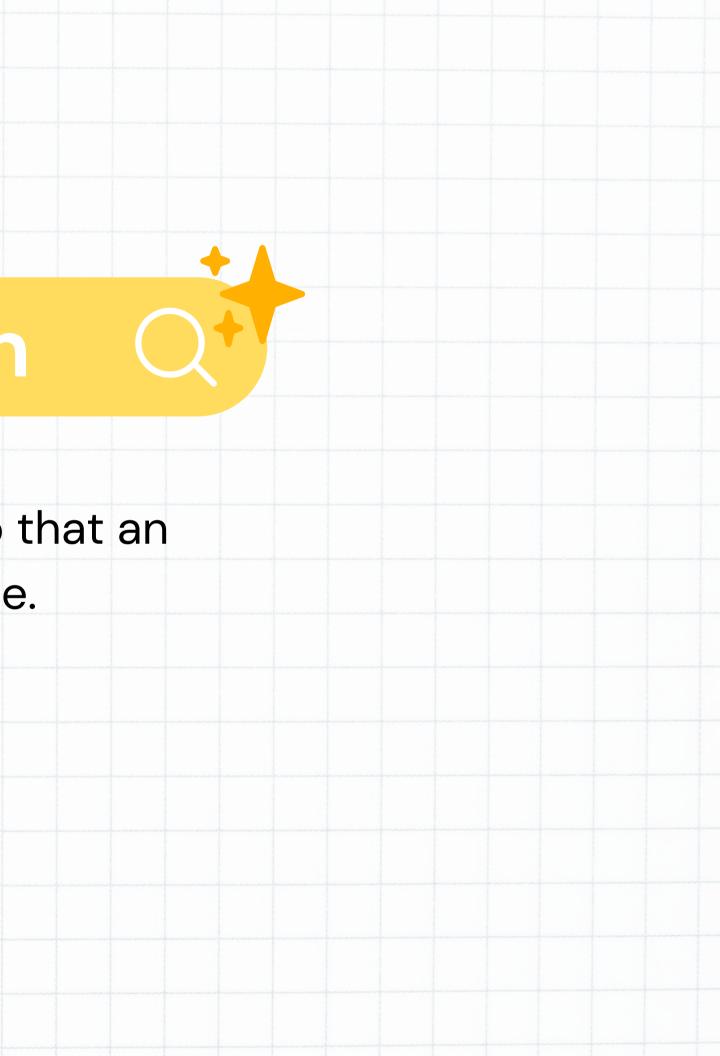
Workflow rules f Technology sh highly and owner an email (Co

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ising Global Search.	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       (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. 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

	Q. Se	arch Setup
Setup Home Object	Manager 🗸	
Q flow	SETUP Flows	IC MASSINE
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Flow Category	Flow Definitions	
<ul> <li>Process Automation</li> </ul>	All Flows 🔻 🕴	
	25 items • Sorted by Flow Label • Filtered by All flow definitions • Up	odated a few seconds a
Automation Home (Beta)	Flow Label ↑	Process Type
Migrate to Flow	Book Appointment from Invitation	Salesforce Schedu
Paused And Failed Flow	Cancel Item Flow	Screen Flow
Interviews	Change Case Owner to Incident Owner	Screen Flow
Process Builder	Close Change Request & Related Issues	Screen Flow
✓ Workflow Actions	Confirm Booking Request	Screen Flow
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
<ul> <li>Environments</li> </ul>	Inbound Modify Appointment	Salesforce Schedu
<ul> <li>Monitoring</li> </ul>	Inbound New Appointment	Salesforce Schedu
Time-Based Workflow	Inbound New Guest Appointment	Salesforce Schedu
✓ Identity	Orchestration flow for Recurrence Scheduler	Autolaunched Flow
Login <mark>Flow</mark> s	Outbound Modify Appointment	Salesforce Schedu
	Outbound New Appointment	Salesforce Schedu
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	Reset Password	Screen Flow

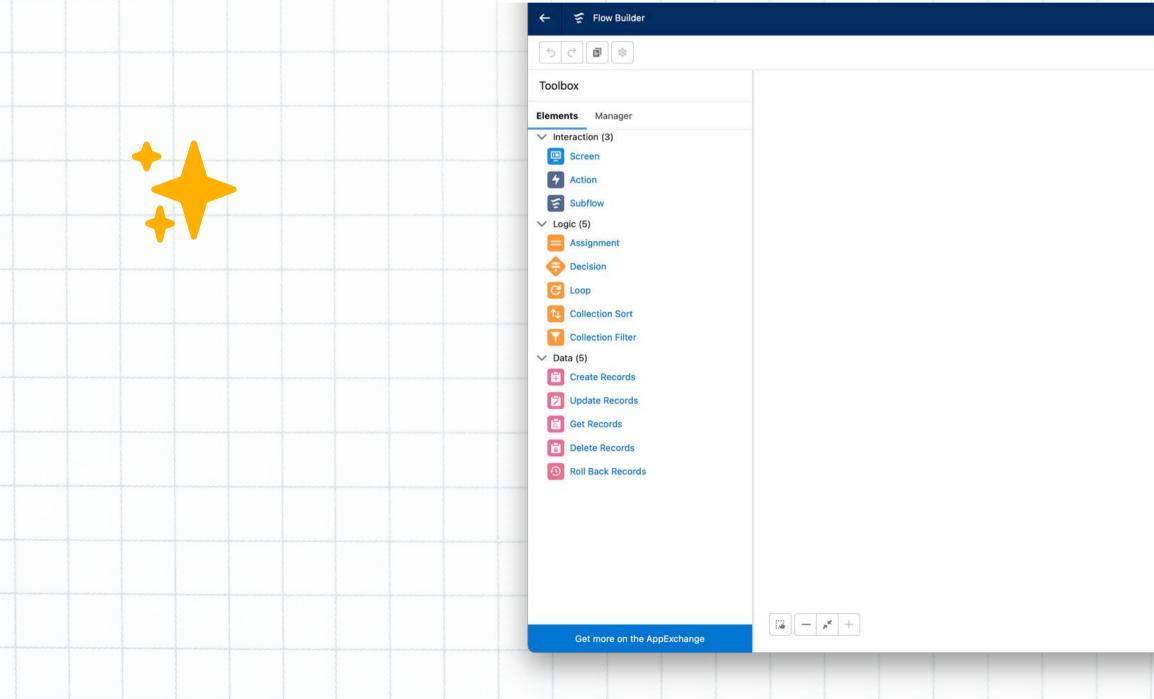
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### Sele 4

	<b>Flow Creation</b>	
reen Flow	v and click Done	
← S Flow Builder		Free-Form     Run     Debug     Activate     Save As     Save
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

<sup>5</sup> 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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				ſ	Free-Form	•	Run Deb	oug Act	ivate S	Save As	Save	
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	- C	2										
	Sta Screen	Flow										
		·										

## Flov

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

E

6

5 0 0 0	
Toolbox	
Elements Manager	
✓ Interaction (3)	
🖳 Screen	
4 Action	
Subflow	
✓ Logic (5)	
Assignment	
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C Loop	
Collection Sort	
Collection Filter	
🗸 Data (5)	
Create Records	
Update Records	
Get Records	
Delete Records	
Roll Back Records	

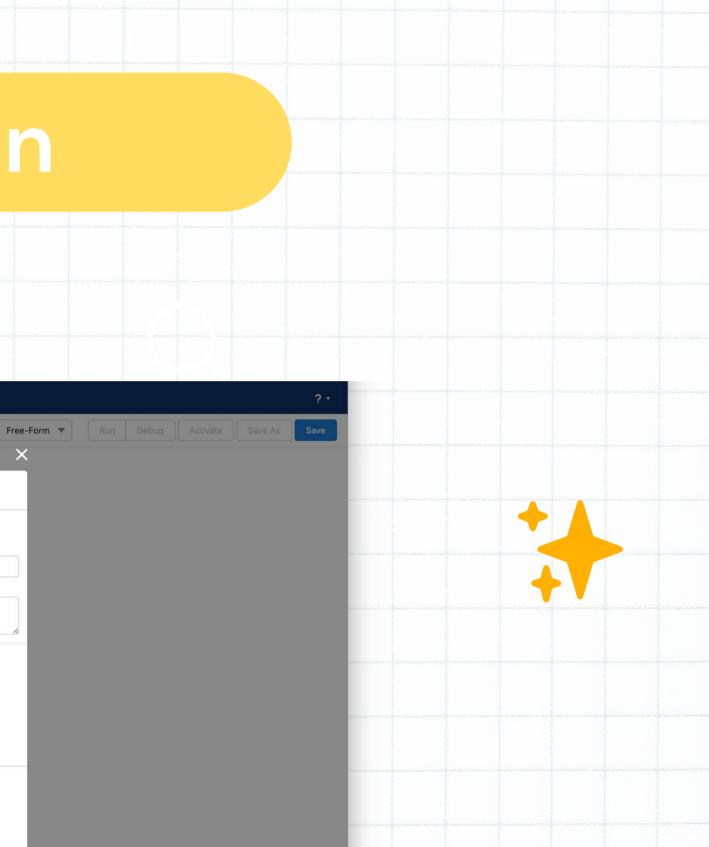
v Creat	ion	
New Get	Records	? * Activate Save As Save
Find Salesforce records and store their field values in flow variables  Label Get Queue Description Look up queue where the cases should be placed in.  Get Records of This Object  Object Group Filter Group Records Condition Requirements	API Name     Get_Queue     + New Resource     Global Constants     A <sub>a</sub> \$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 <sub>a</sub> Course_Enrolled     Text     # Email     Email     >	
All Conditions Are Met (AND)	filter by a unique field, such as ID.	

- \*

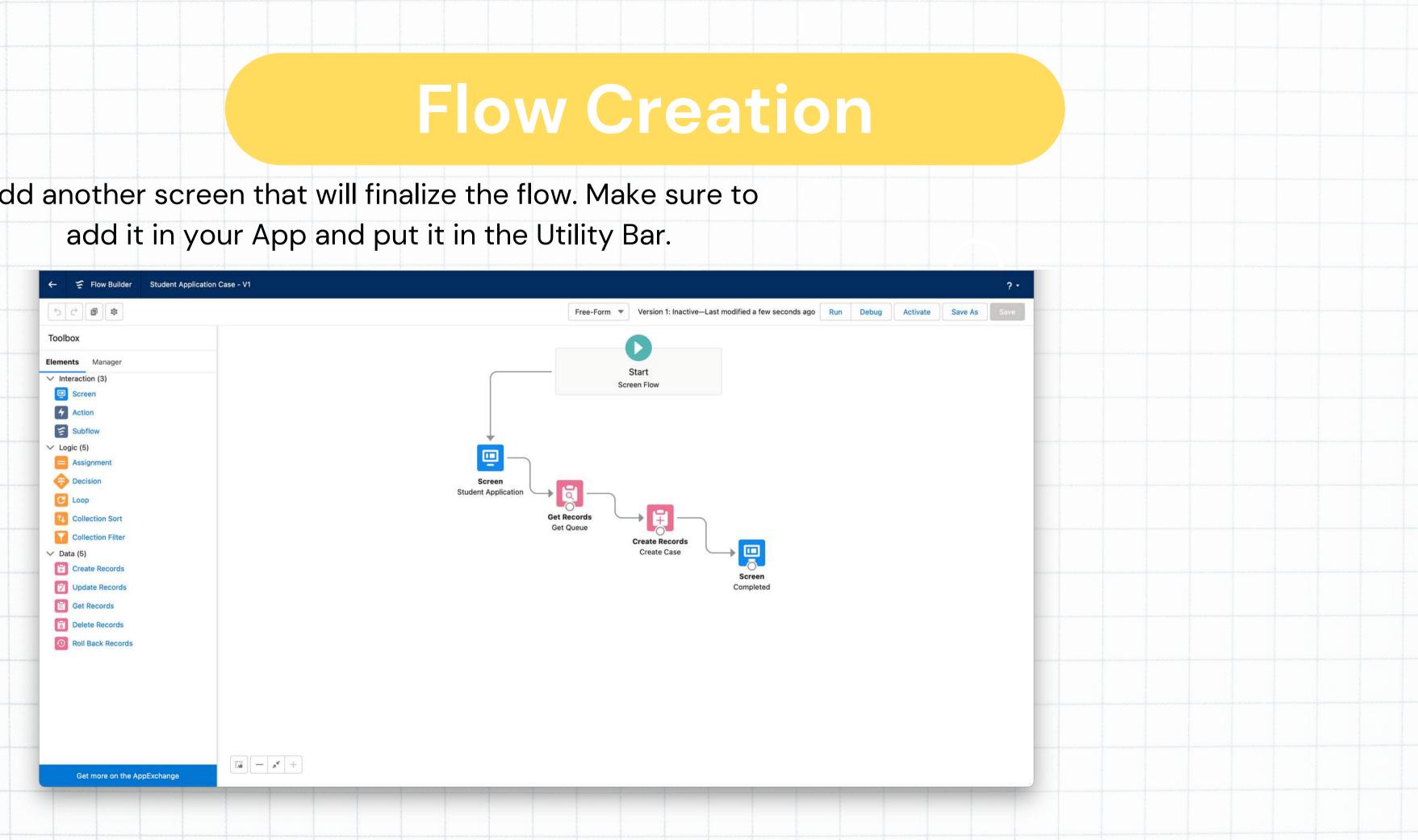
## **Flow Creation**

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.

	Flow Builder				
50	8				
Toolbox					
personal and person and and a	Manager		New C	Create Records	
V Interac	reen		Create Salesforce records using values from the flow.	• API Name	
	tion		Create Case	Create_Case	
Su V Logic (			Description		
As	signment		Set fields values for case and create it.		
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
G	Set more on the AppExchange	····			



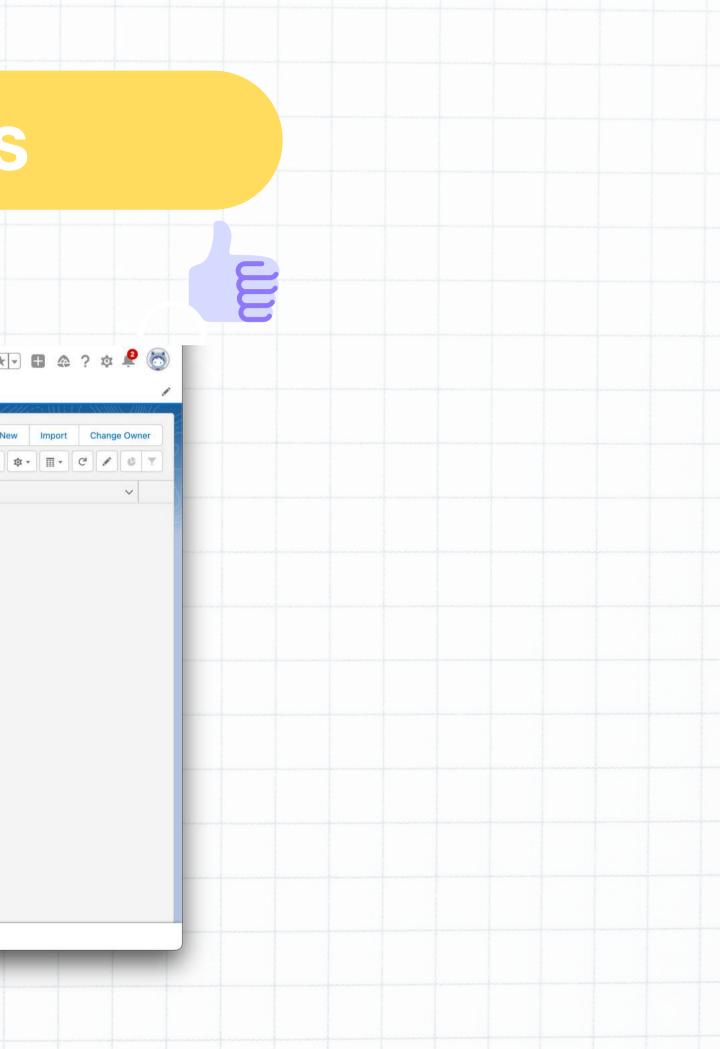
Add another screen that will finalize the flow. Make sure to 8 add it in your App and put it in the Utility Bar.



## Flow Process

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

	ASSACTUREARD CANNIG THREE TRASTICTUREARD OF SSING THREE TRASTICTURE	>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>
Courses Recently Viewed •		
tems • Updated 3 minutes ago		Q Search this list
Course Name		
Student Application            209-342-4810           Email            industry@mac.com            Course Enrolled	You haven't viewed any Courses recently. Try switching list views.	
Subject Help With Chapter 2		
nstructor Name		
Mindy Jefferson		
Query Description		
I wanted to go through Biology 101.		



The W ne

10

	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.		? ☆ ₽ 💿	
MTBF Academy       Courses ∨ Subjects ∨ C         Courses       Recently Viewed ▼         0 items • Updated 3 minutes ago         Course Name	rourse Leads 🗸 Instructor Names 🗸 Technologies 🗸 Reports 🗸 Dashboards 🗸	New     Import       Q. Search this list     ✿ ▼ III ▼	Change Owner	
<ul> <li>Student Application C</li> <li>209-342-4810</li> <li>Email industry@mac.com</li> <li>Course Enrolled</li> <li>Science</li> <li>Subject</li> <li>Help With Chapter 2</li> <li>Instructor Name</li> <li>Mindy Jefferson</li> <li>Query Description</li> <li>I wanted to go through Biology 101.</li> </ul>	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?**

