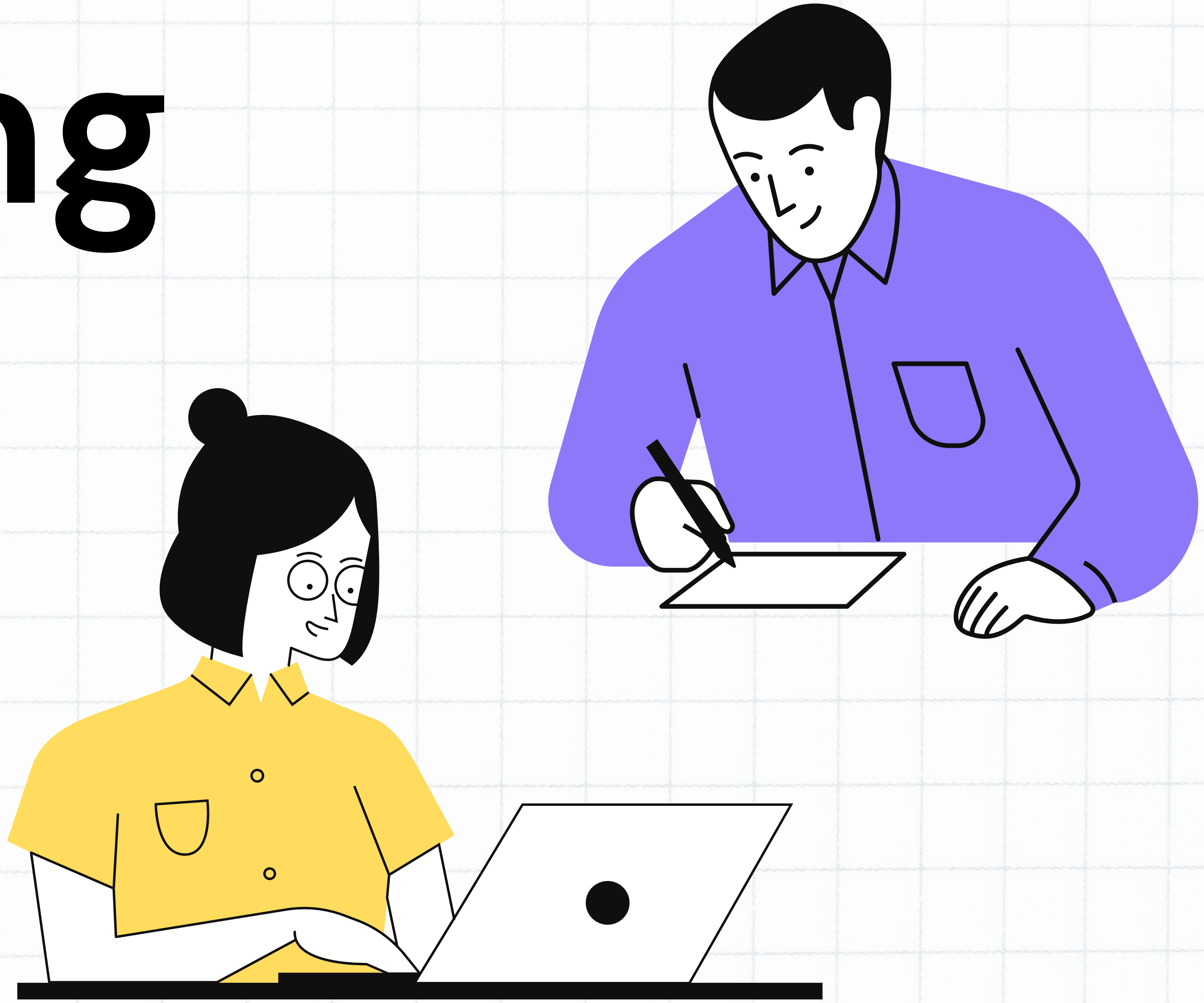
MTBF CONSULTING

Salesforce Flow Builder Training Manual

Capstone Project



Contributors

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Ellie Loo — Field Creation

Shantel Chambers — Validation Rules

Ashley Maxi — Workflow Rules

David 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.

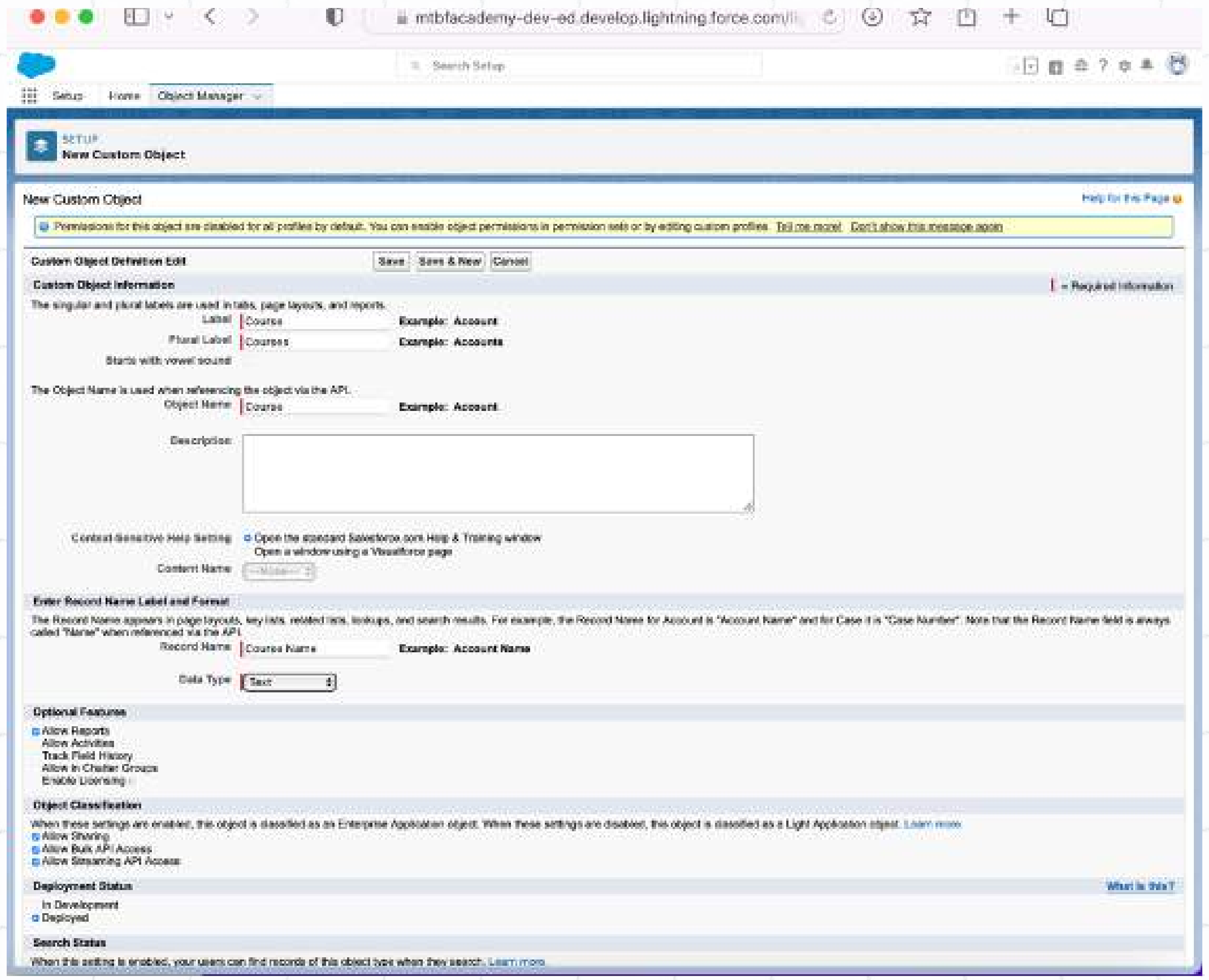
Object Creation

Creating objects for the Flow.

Create Custom Objects

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

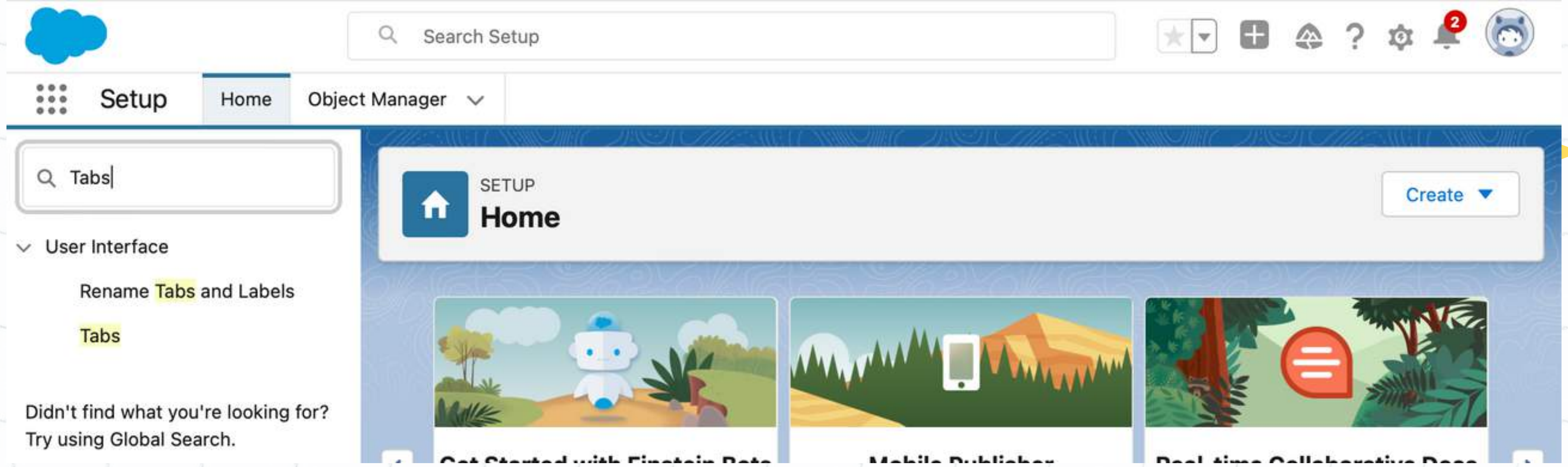
Complete New Custom Object information for 'Course'.
Select Save and New.



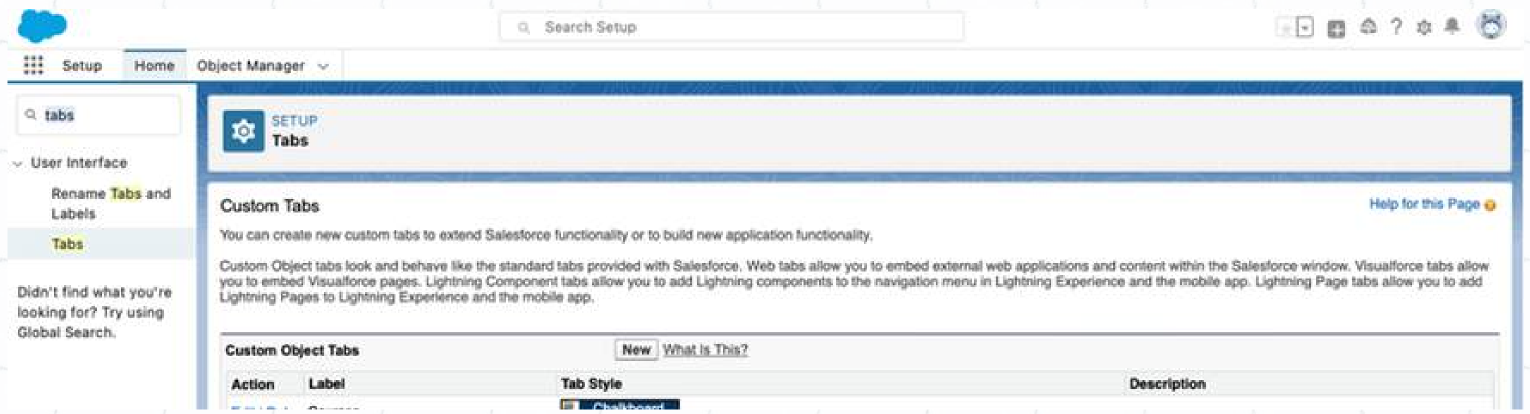
Repeat Steps for Custom Objects below:
-Subjects
-Course Leads
-Technology
-Instructor Name

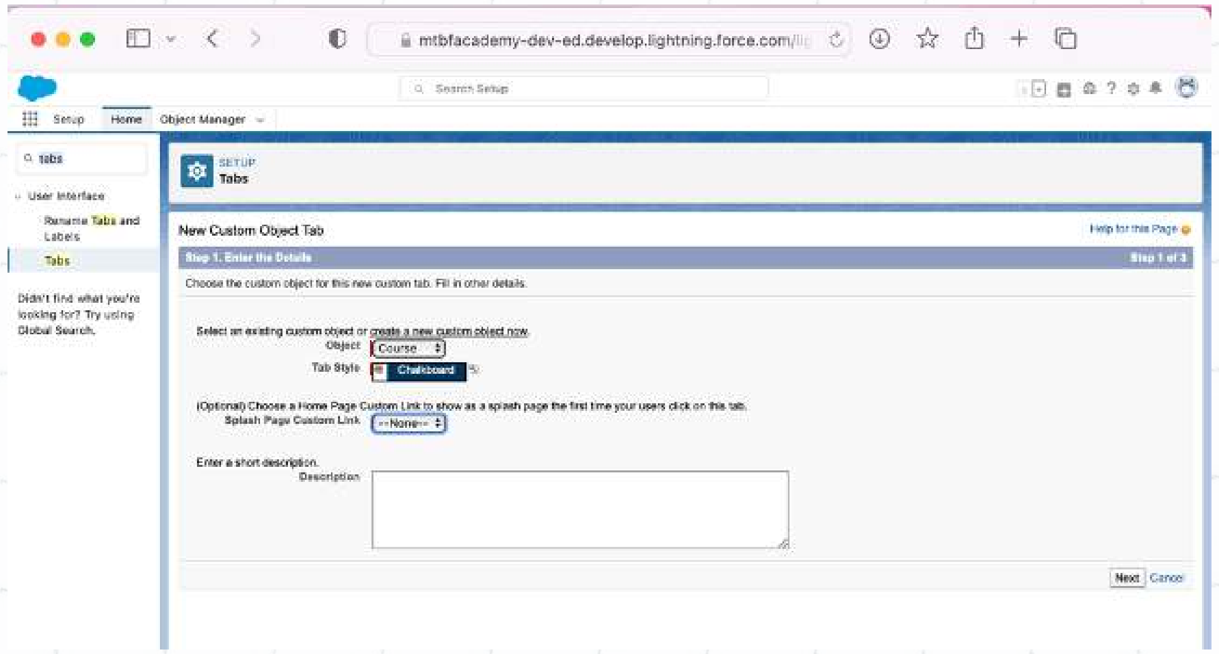
Create Tabs

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



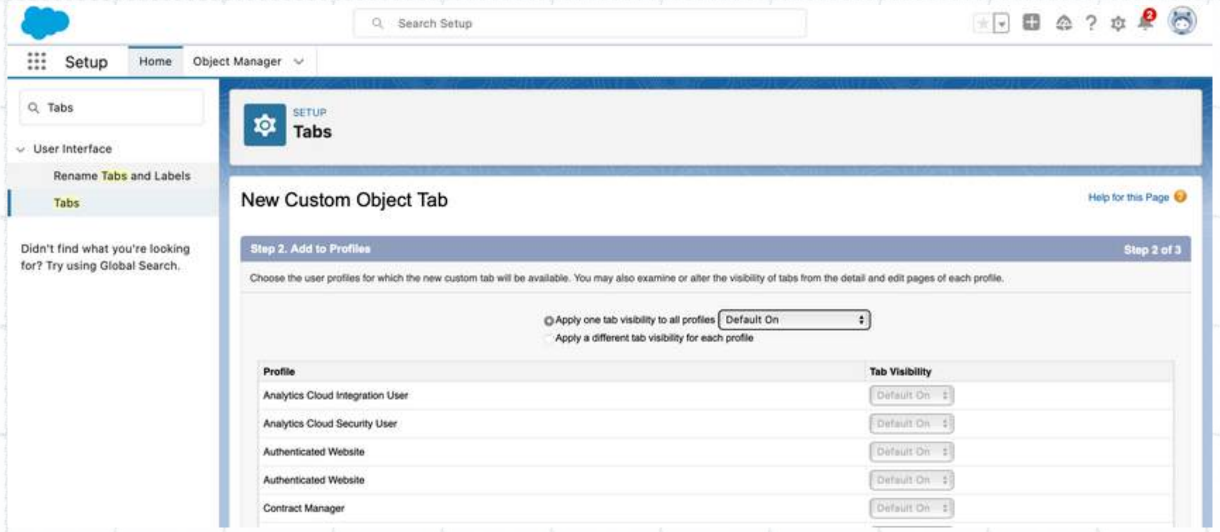
Select 'New' next to Custom Object Tabs.
Enter Course Tab Details.
Select Next.



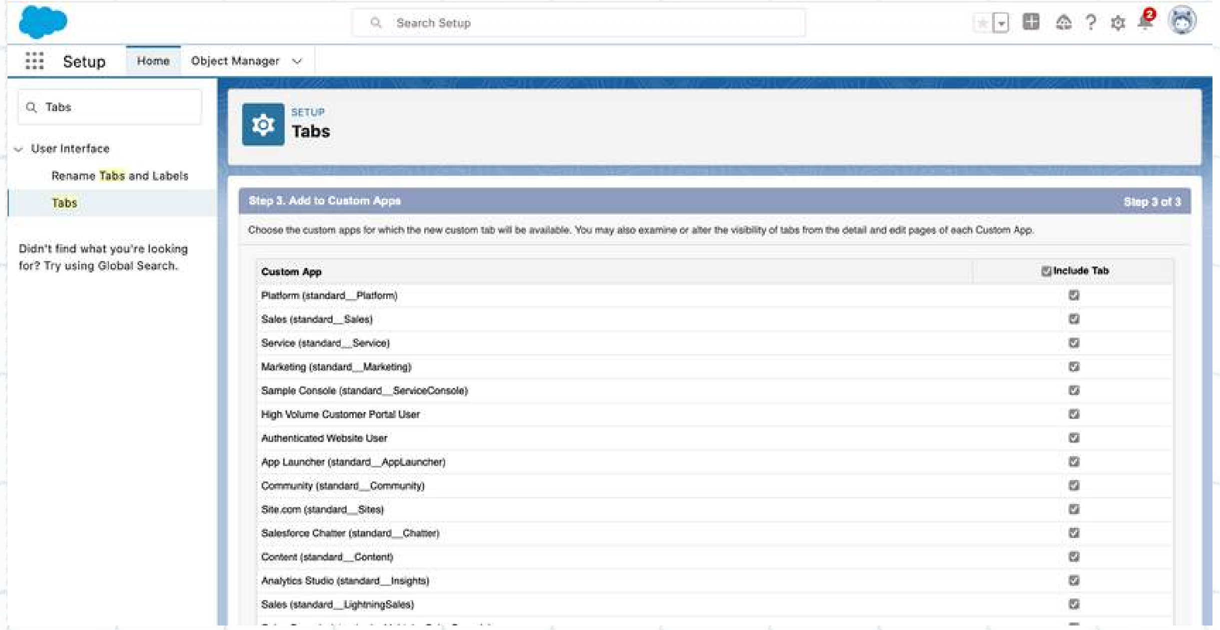


Create Tabs (cont.)

Add Course tab to profiles.

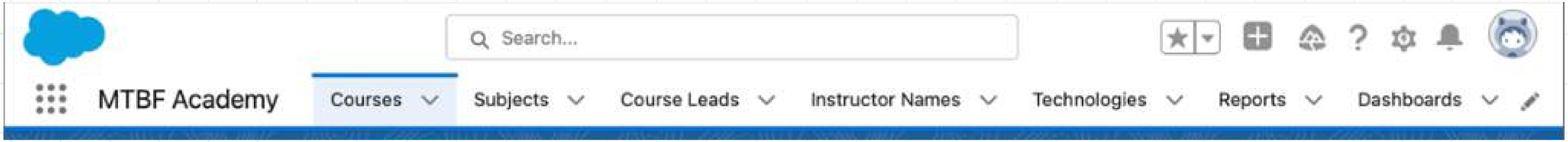


Add Course tab to apps.
Select 'Save'.



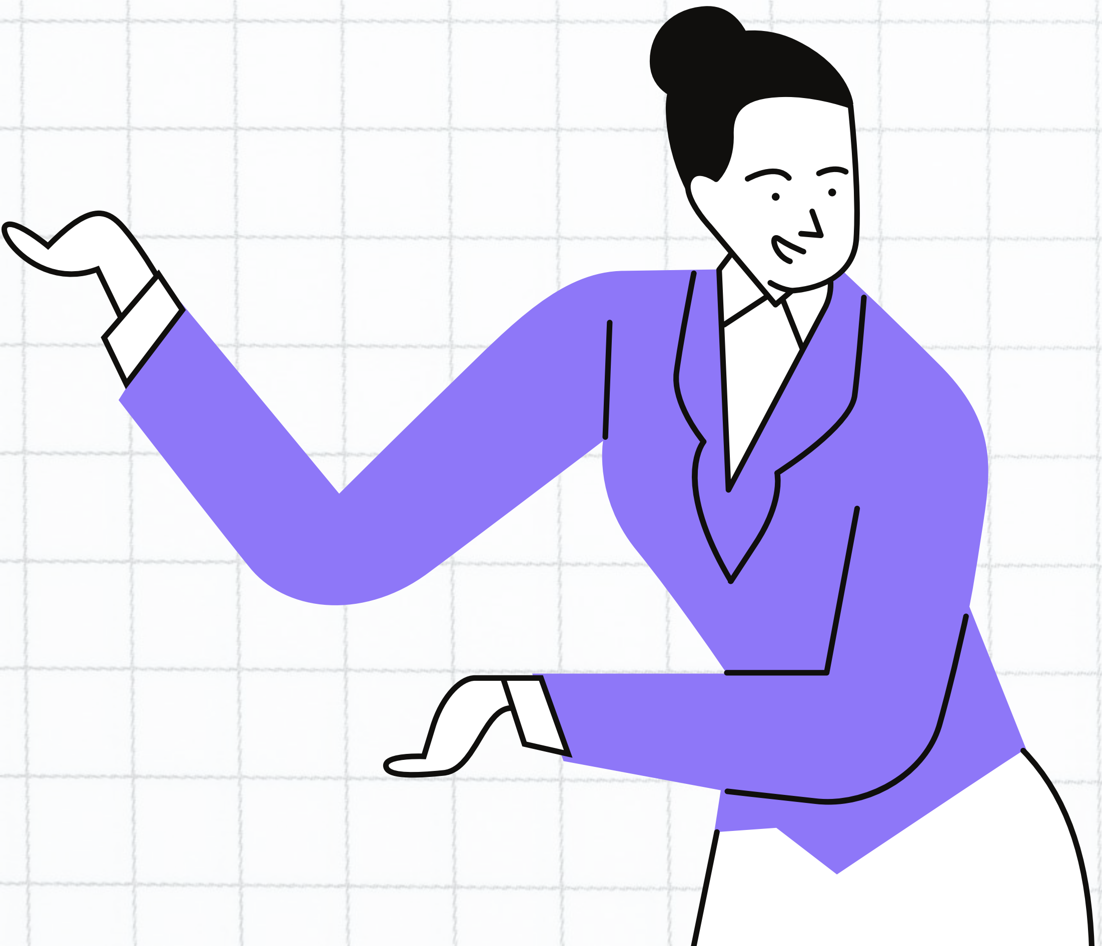
Repeat Steps for Custom Objects:
Subjects
Course Leads
Technology
Instructor Name

Custom Objects Complete



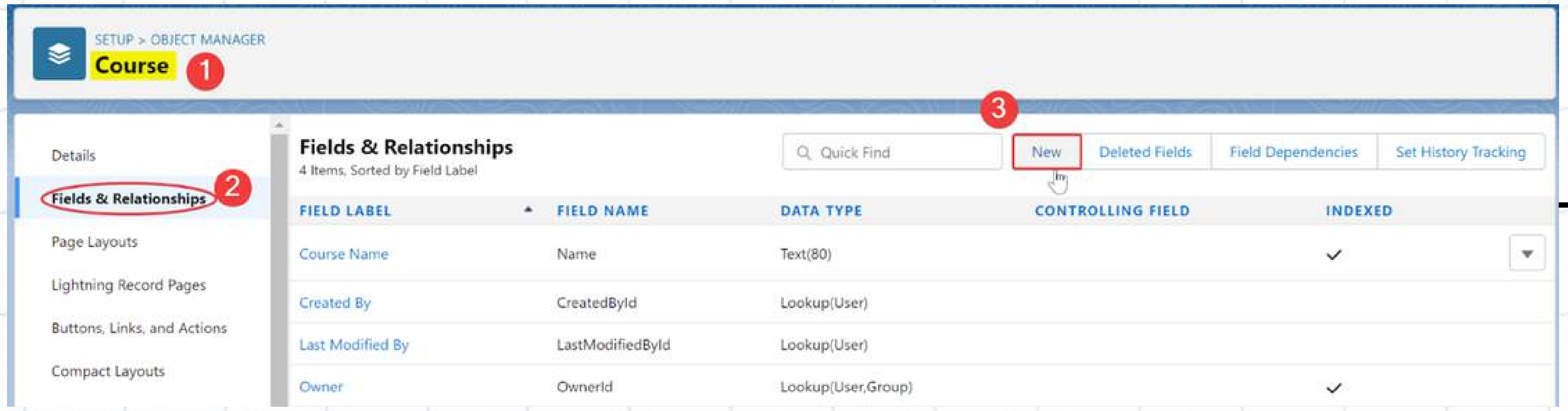
Field Creation

Creating fields for the objects created previously.

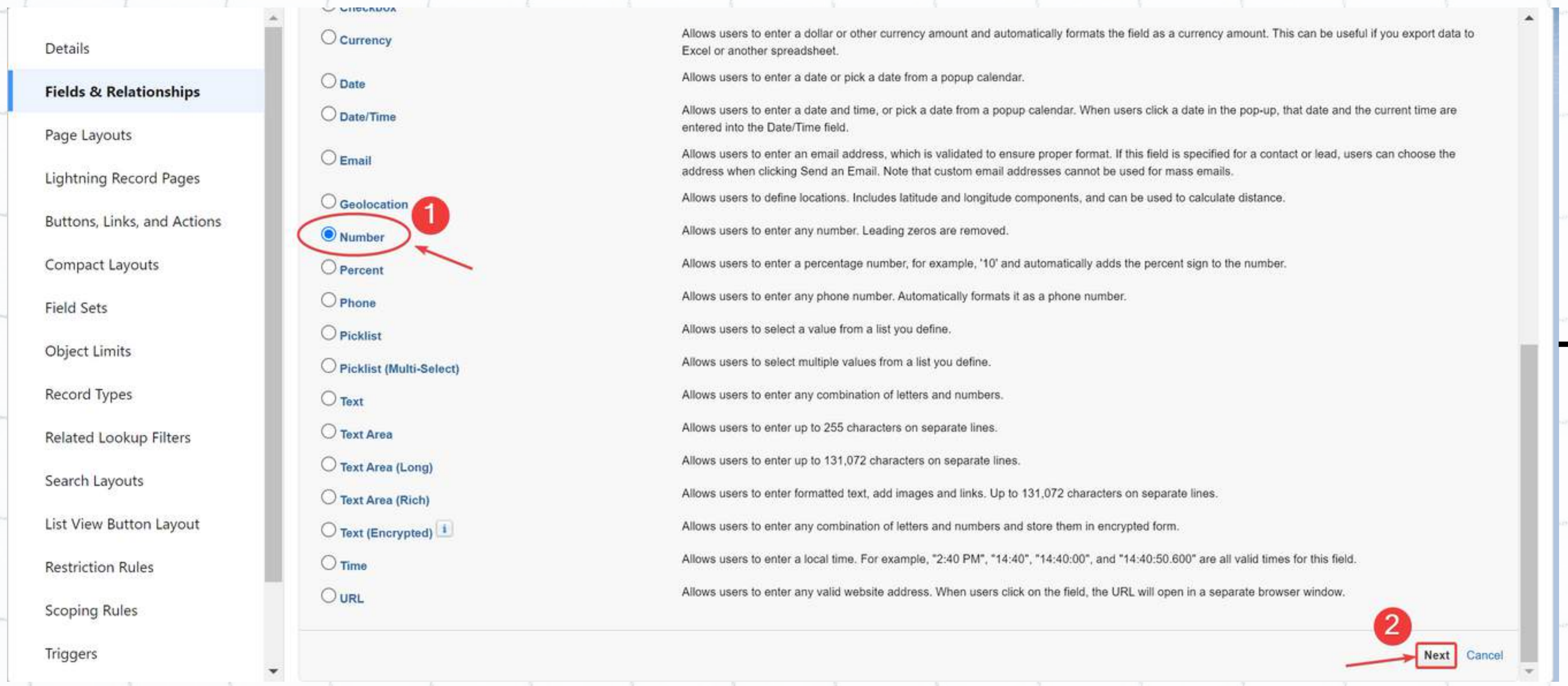


Creating a Field

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

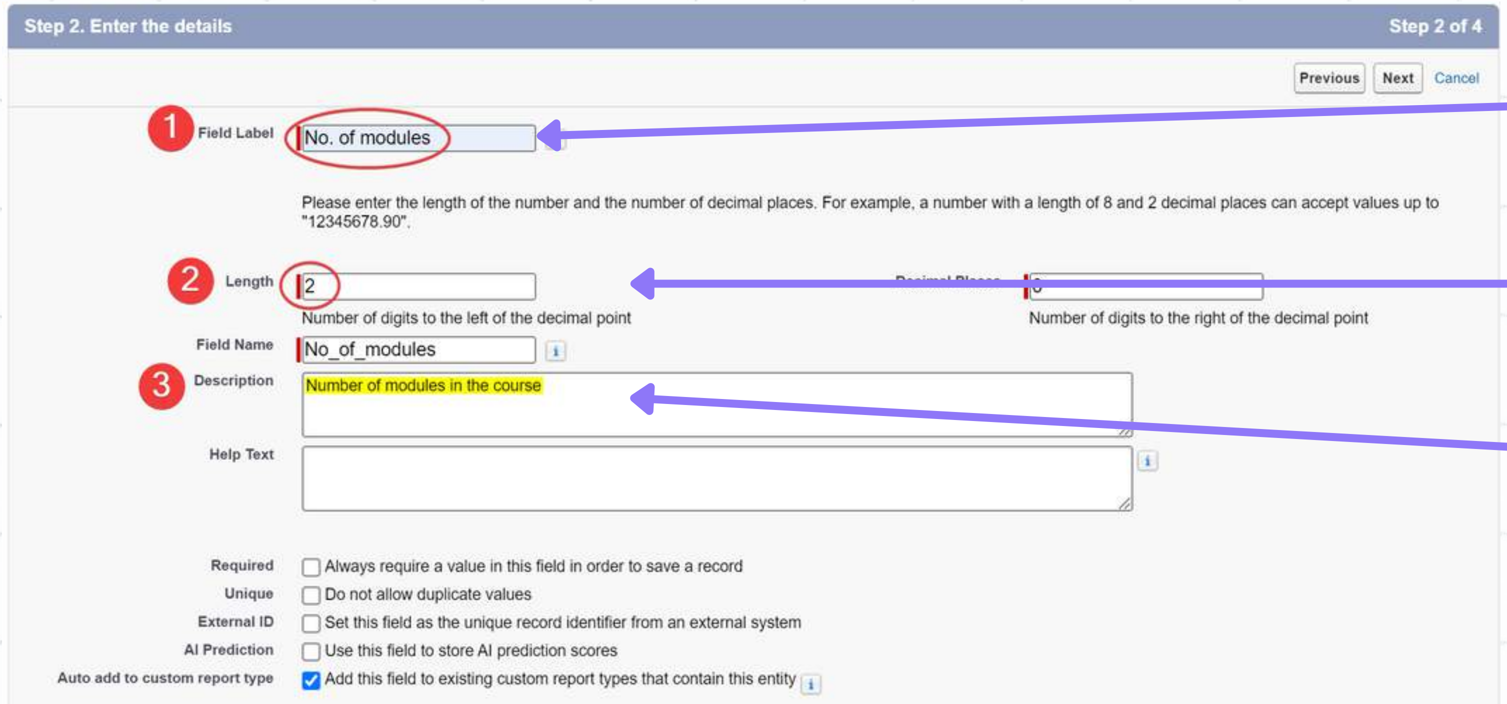


Select Fields & Relationships > Select New



Select Number data type > Select Next

Creating a Field (Continued)



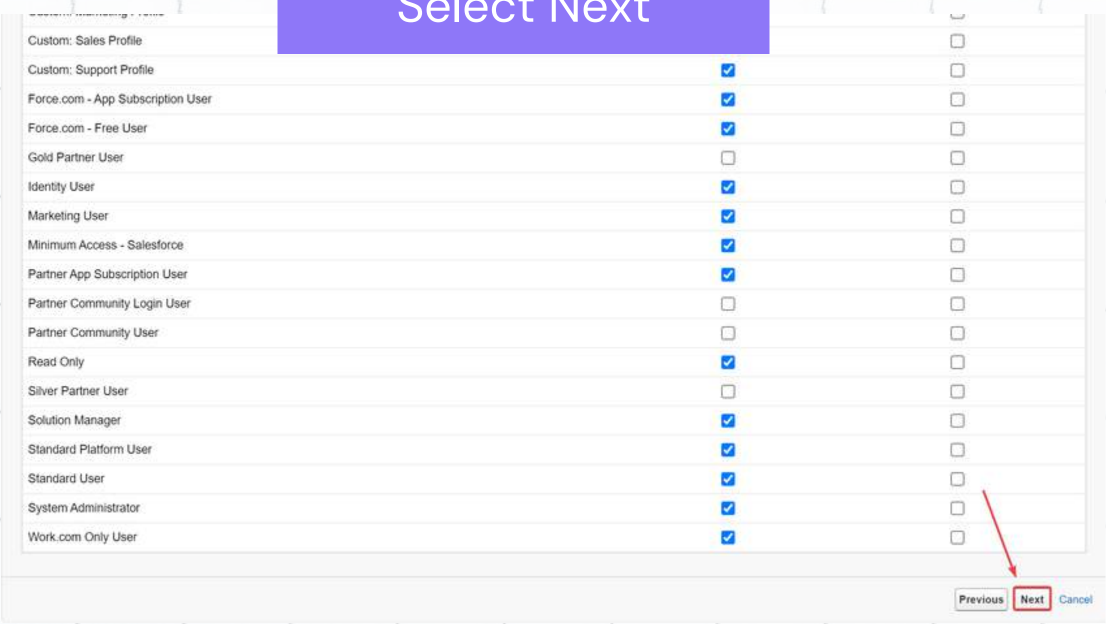
Type "No. of modules" for Field Label

For length type in "2"

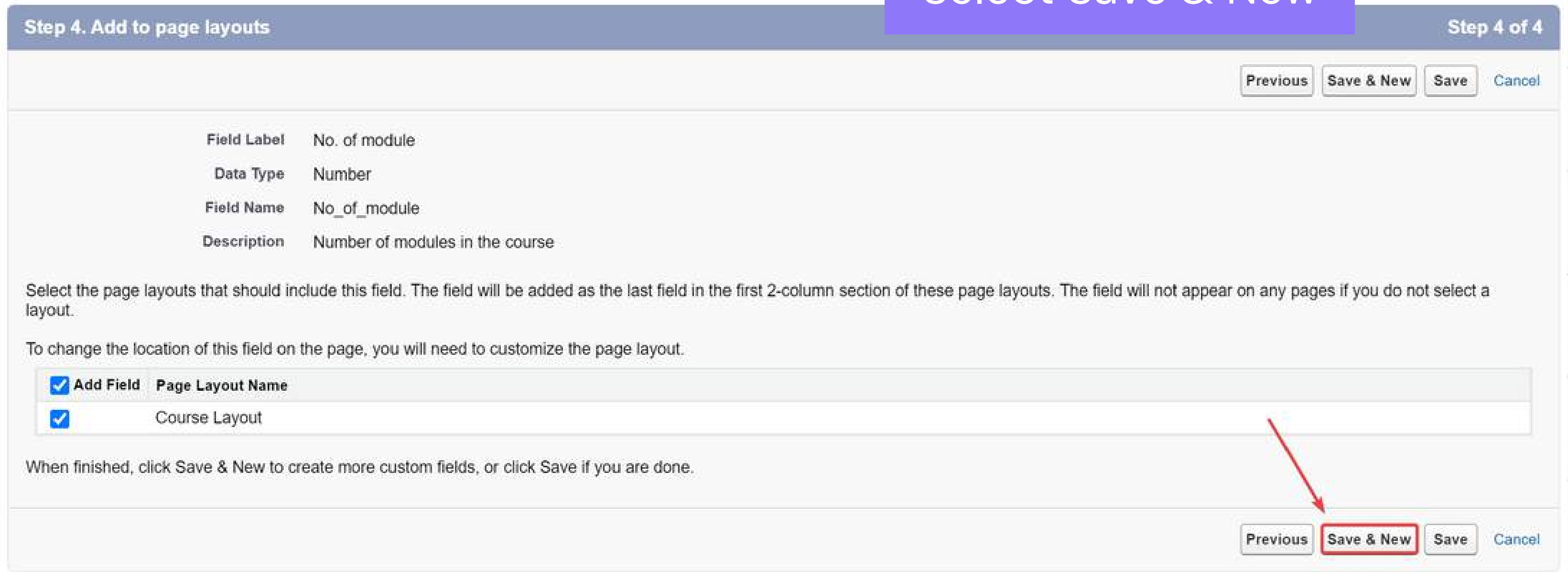
In the description type "Number of modules in the course"

Select Next

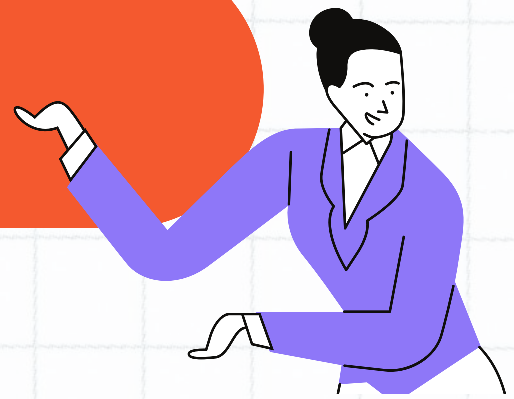
Select Next



Select Save & New



Course Object



New Course

Information

- * Course Name
- * Course duration
- Instructor Name: Search Instructor Names...
- * Start date
- * No. of modules
- * End date
- * Type of course
- * Rating: --None--
- * Priority: --None--
- Active

Cancel | Save & New | Save

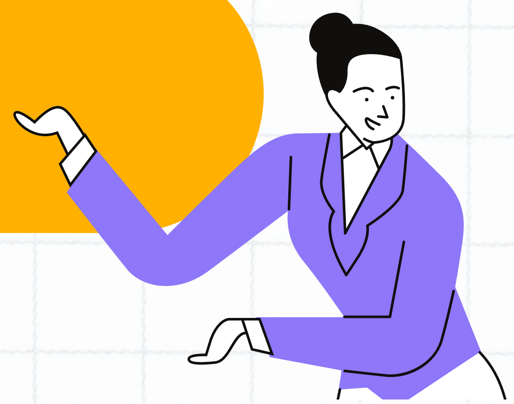
Fields & Relationships

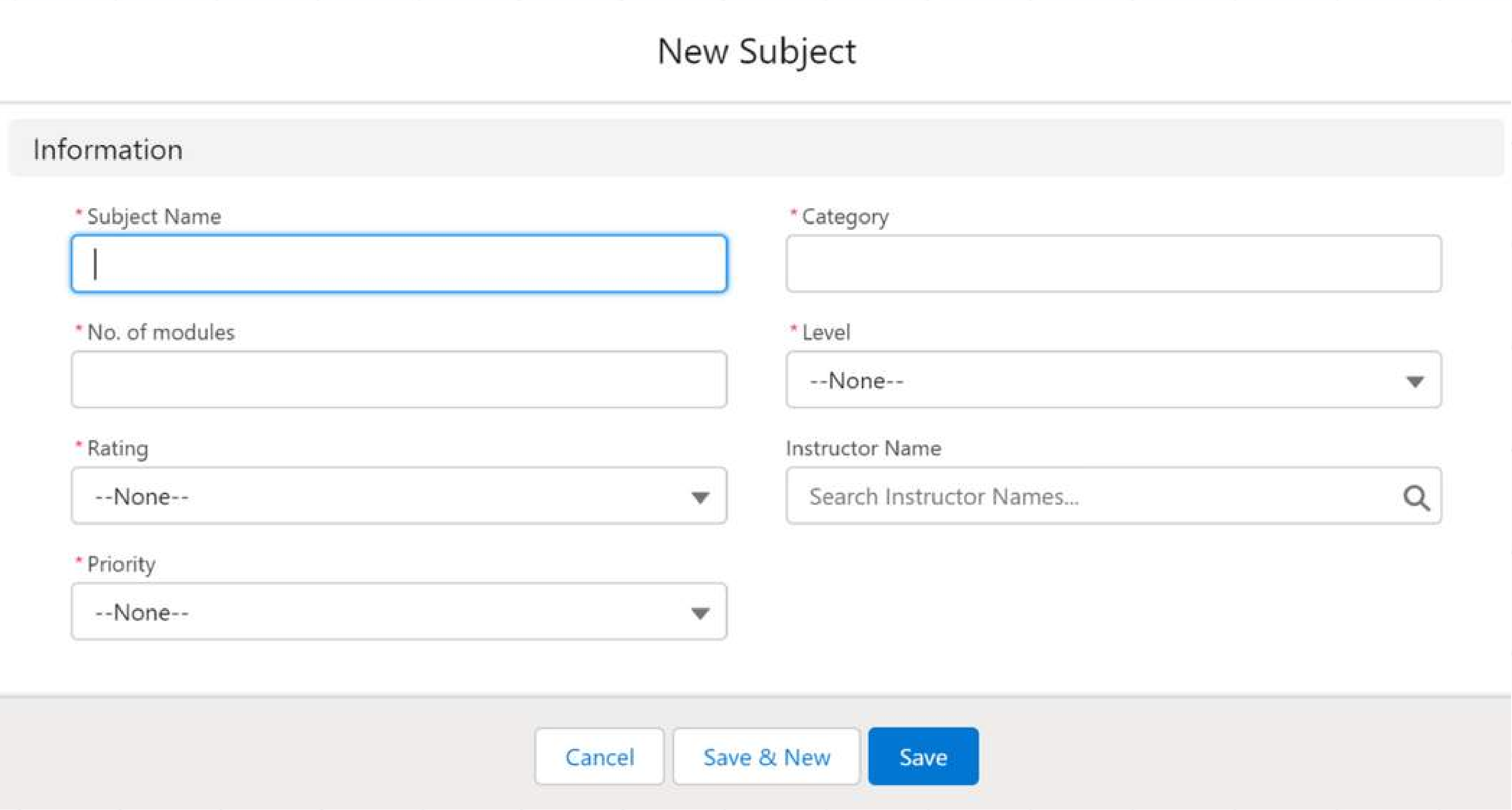
14 Items, Sorted by Field Label

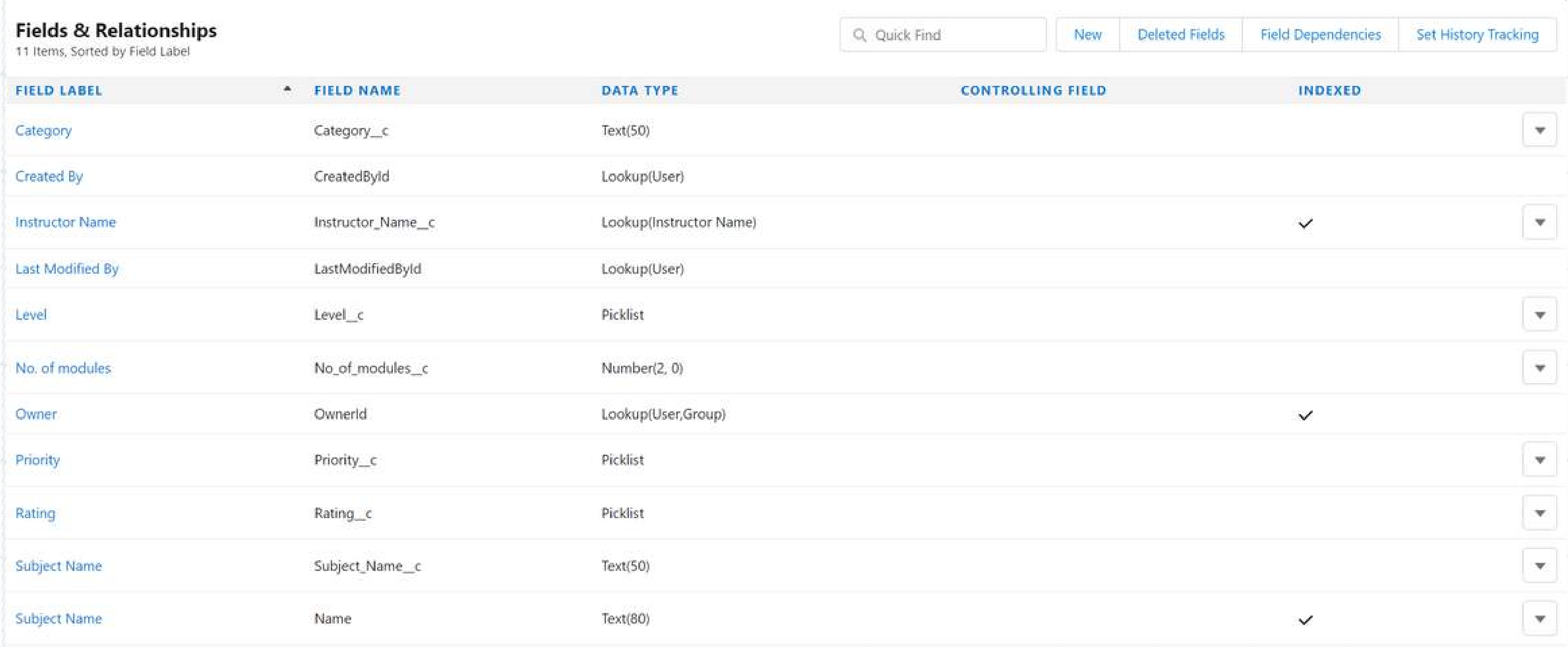
Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

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







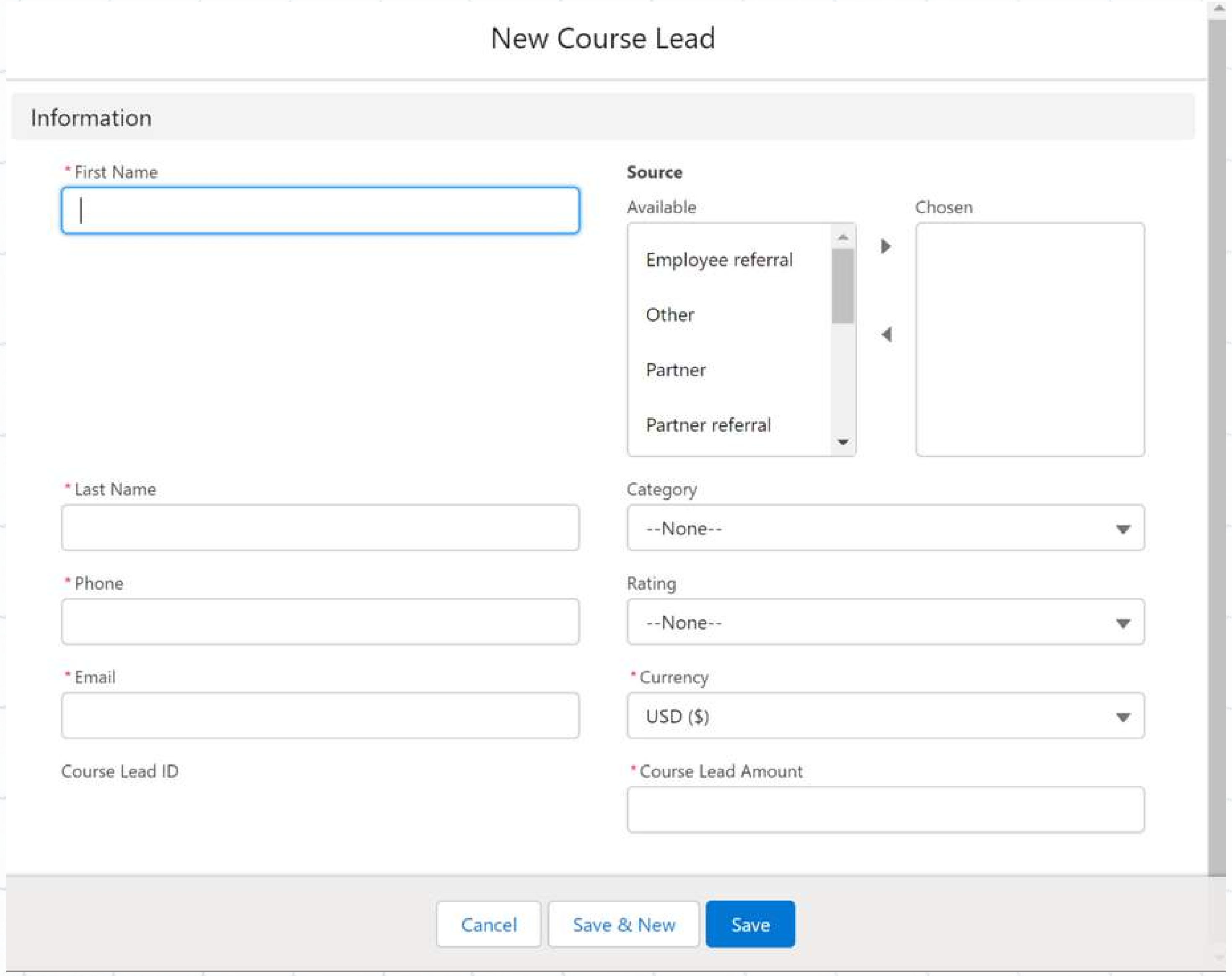
Fields & Relationships

11 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	Text(50)		
Created By	CreatedById	Lookup(User)		
Instructor Name	Instructor_Name__c	Lookup(Instructor Name)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Level	Level__c	Picklist		
No. of modules	No_of_modules__c	Number(2, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Priority	Priority__c	Picklist		
Rating	Rating__c	Picklist		
Subject Name	Subject_Name__c	Text(50)		
Subject Name	Name	Text(80)		✓

Course Lead Object



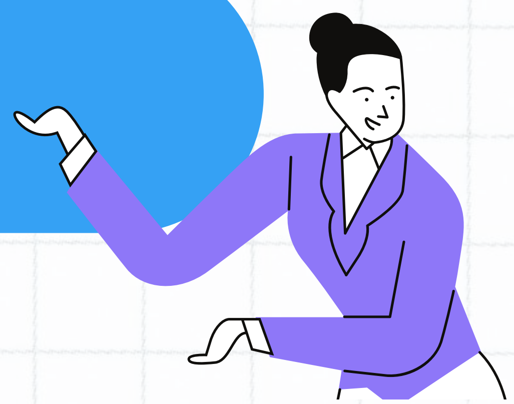
Fields & Relationships

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

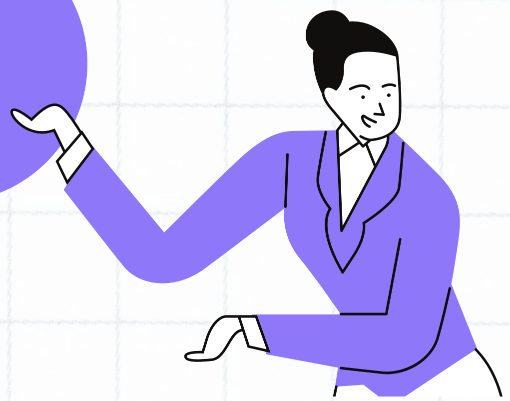
Fields & Relationships

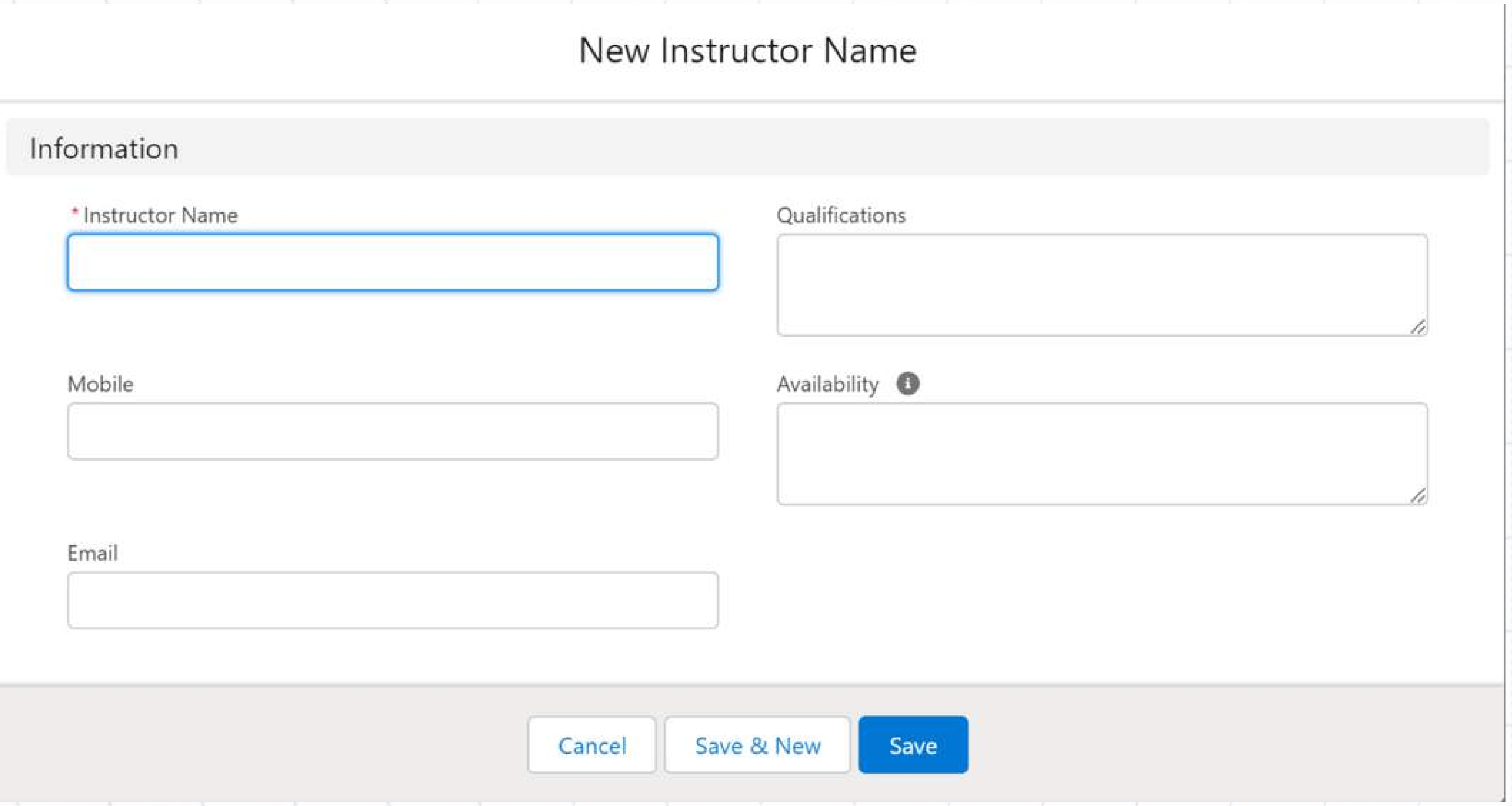
9 Items, Sorted by Field Label

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





Fields & Relationships
8 Items, Sorted by Field Label

Quick Find | New | 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)		

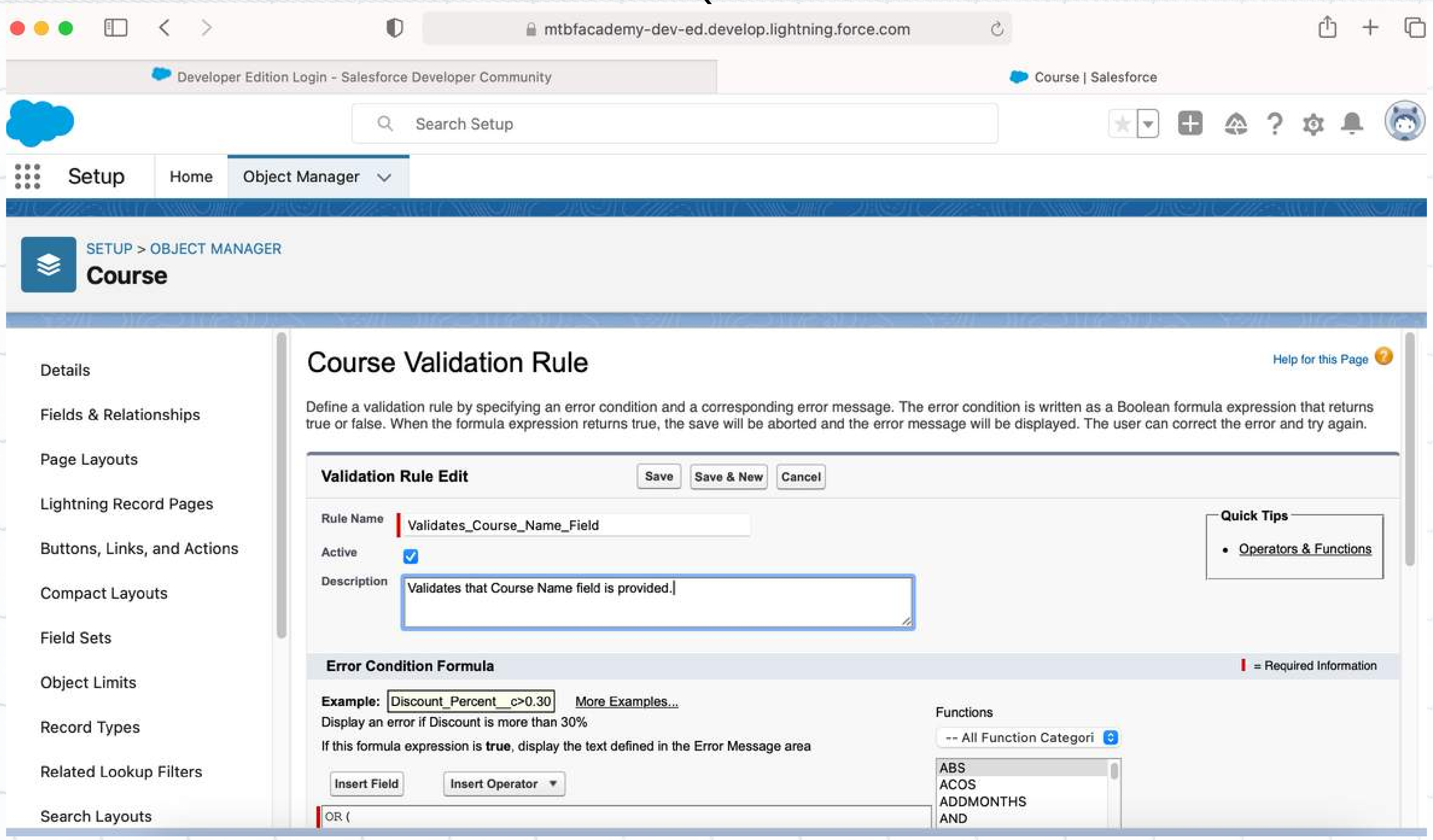
Validation Rules

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

Validation Rule for Course Name Field in Course Object



1

Click Setup icon

2

Navigate to Object Manager

3

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

4

Go to Validation Rule> New.

5

Fill out required fields > Save.

How To Create A Validation Rule (Contd.)

1 Validation Rule for Course Name Field in Course Object

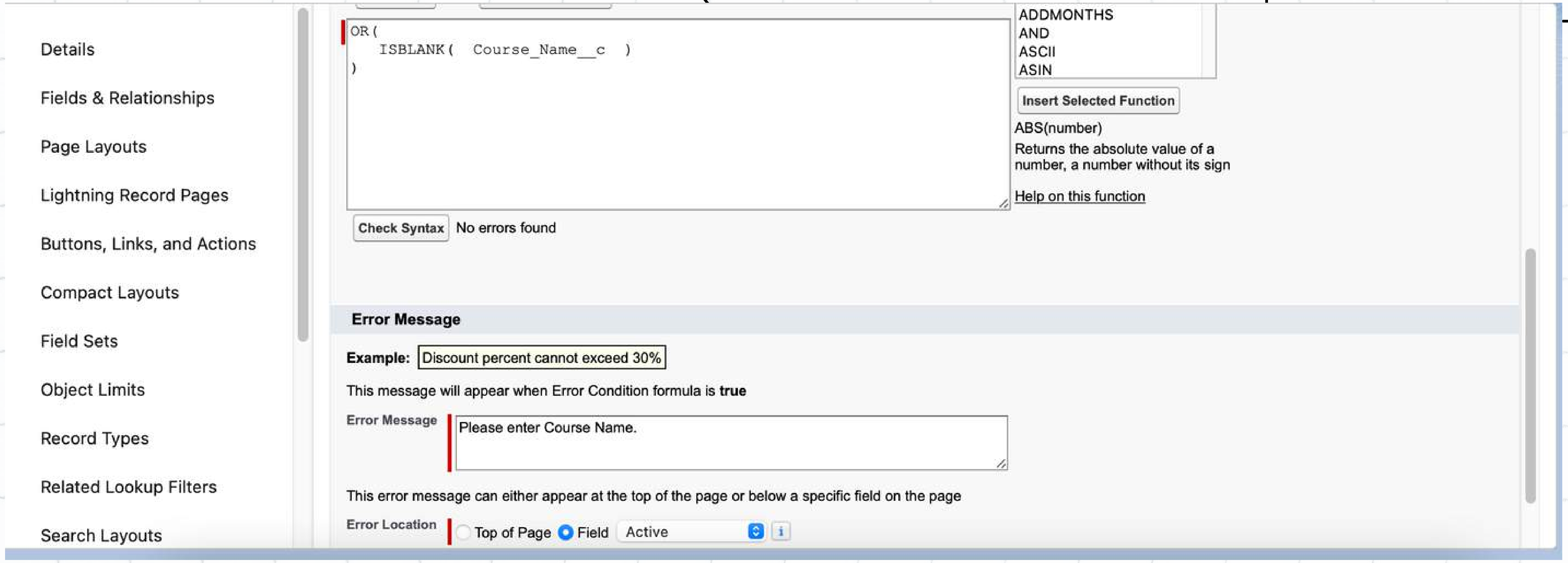
Click Setup icon

2 Navigate to Object Manager

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

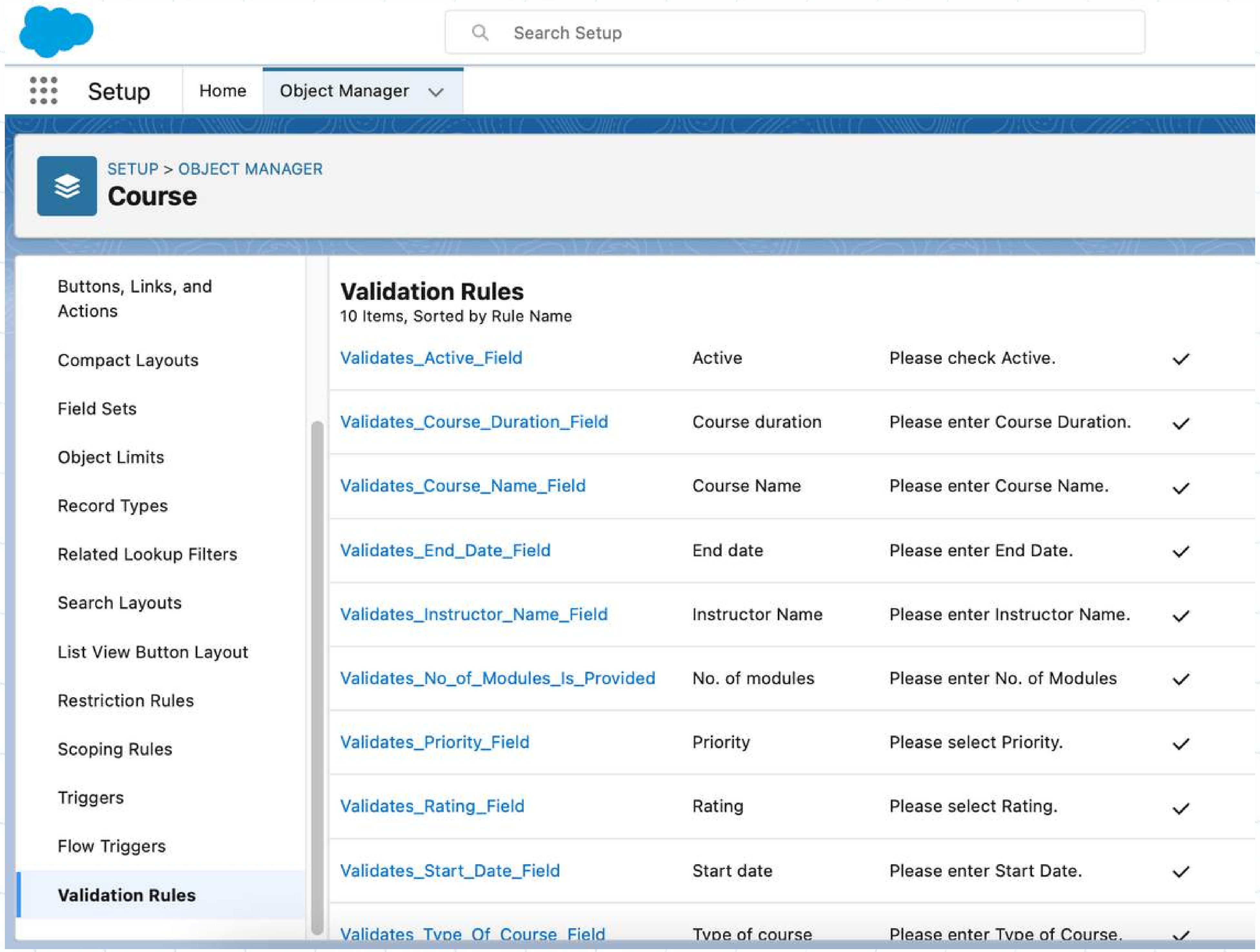
4 Go to Validation Rule> New.

5 Fill out required fields > Save.

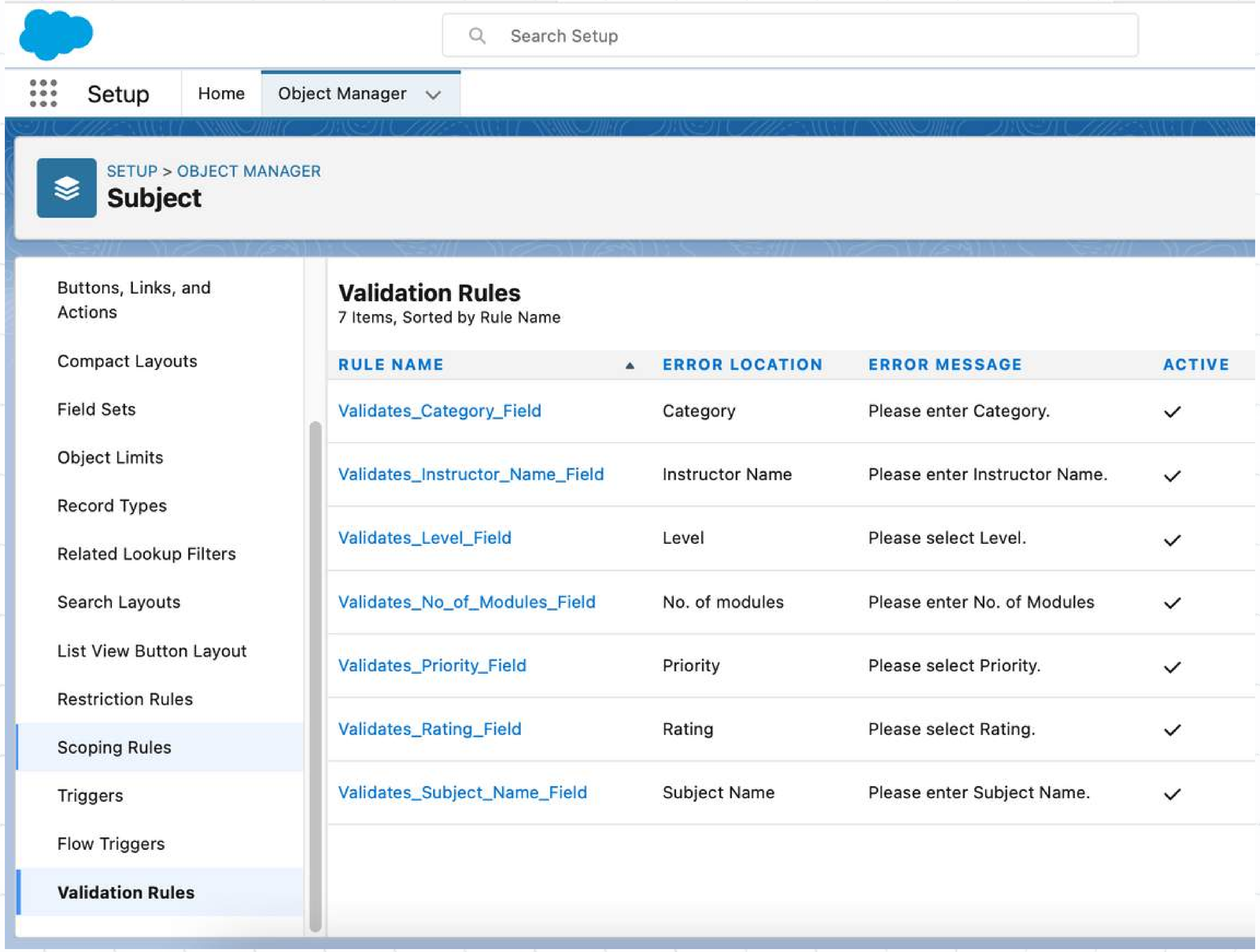


Keeping the language as simple as possible helps.

All Validation Rules for Course Object



All Validation Rules for Subject Object



Search Setup

Setup | Home | Object Manager

SETUP > OBJECT MANAGER

Subject

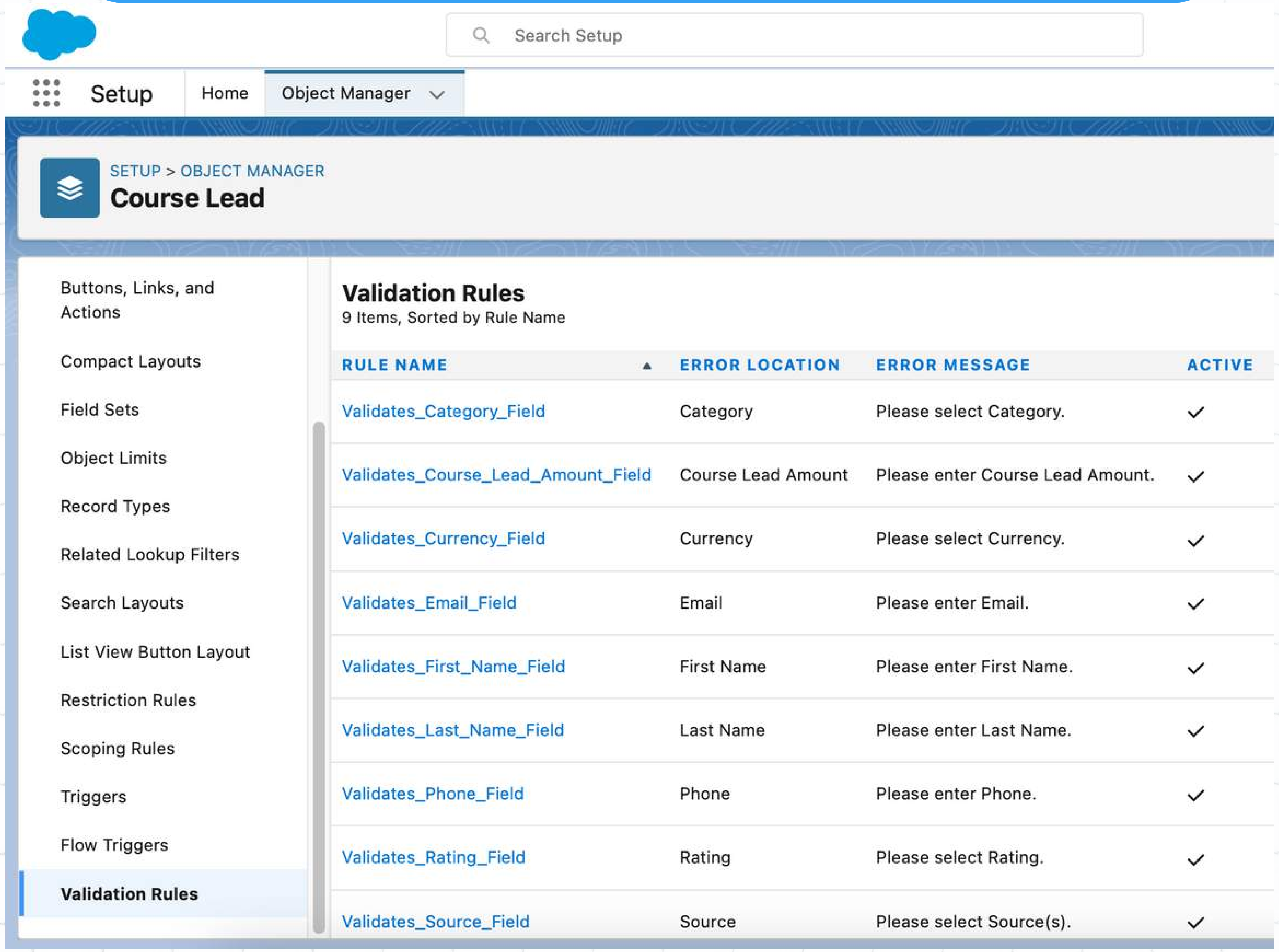
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Validation Rules

7 Items, Sorted by Rule Name

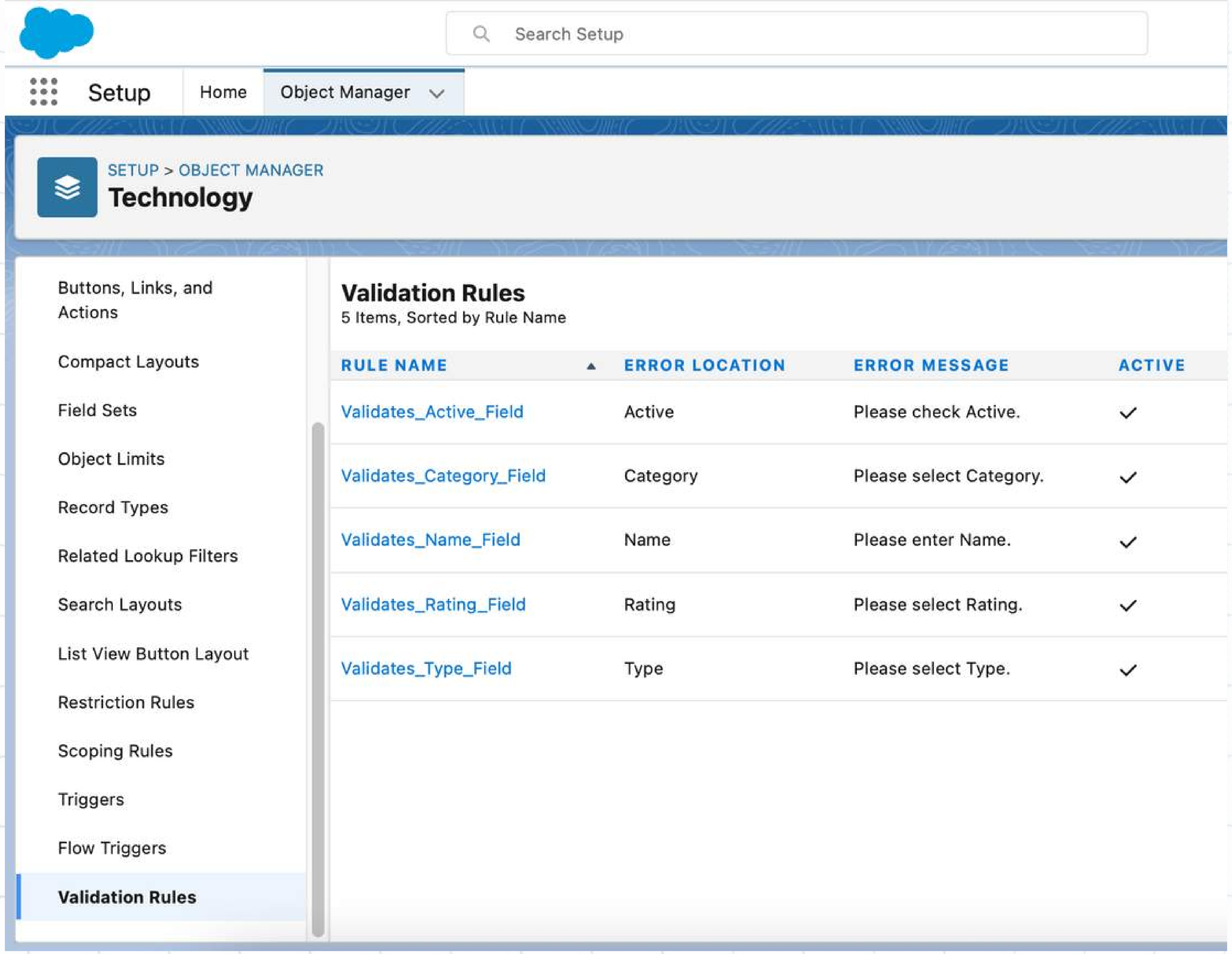
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE
Validates_Category_Field	Category	Please enter Category.	✓
Validates_Instructor_Name_Field	Instructor Name	Please enter Instructor Name.	✓
Validates_Level_Field	Level	Please select Level.	✓
Validates_No_of_Modules_Field	No. of modules	Please enter No. of 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



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



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

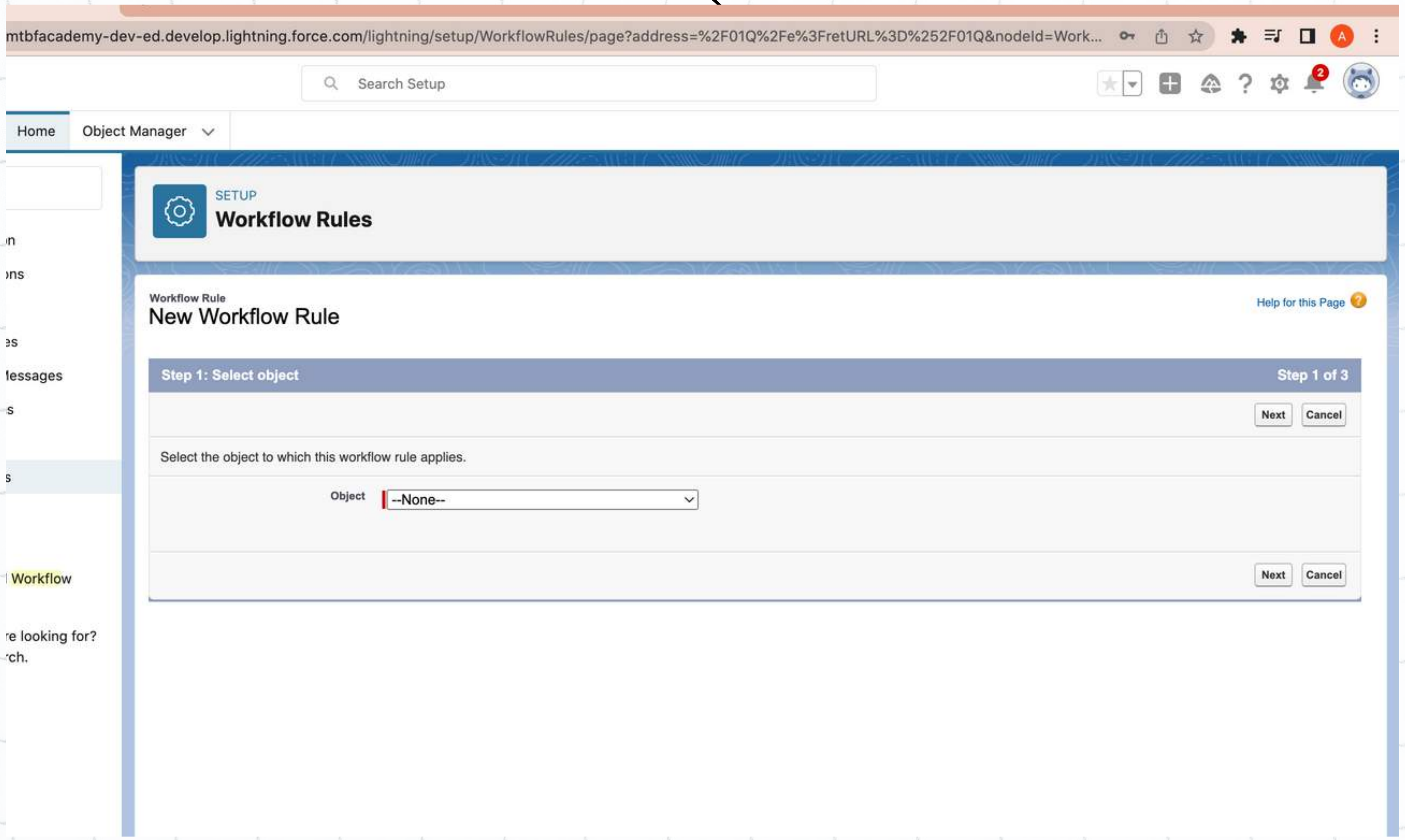
Go to Workflow Rule> New. Select Object

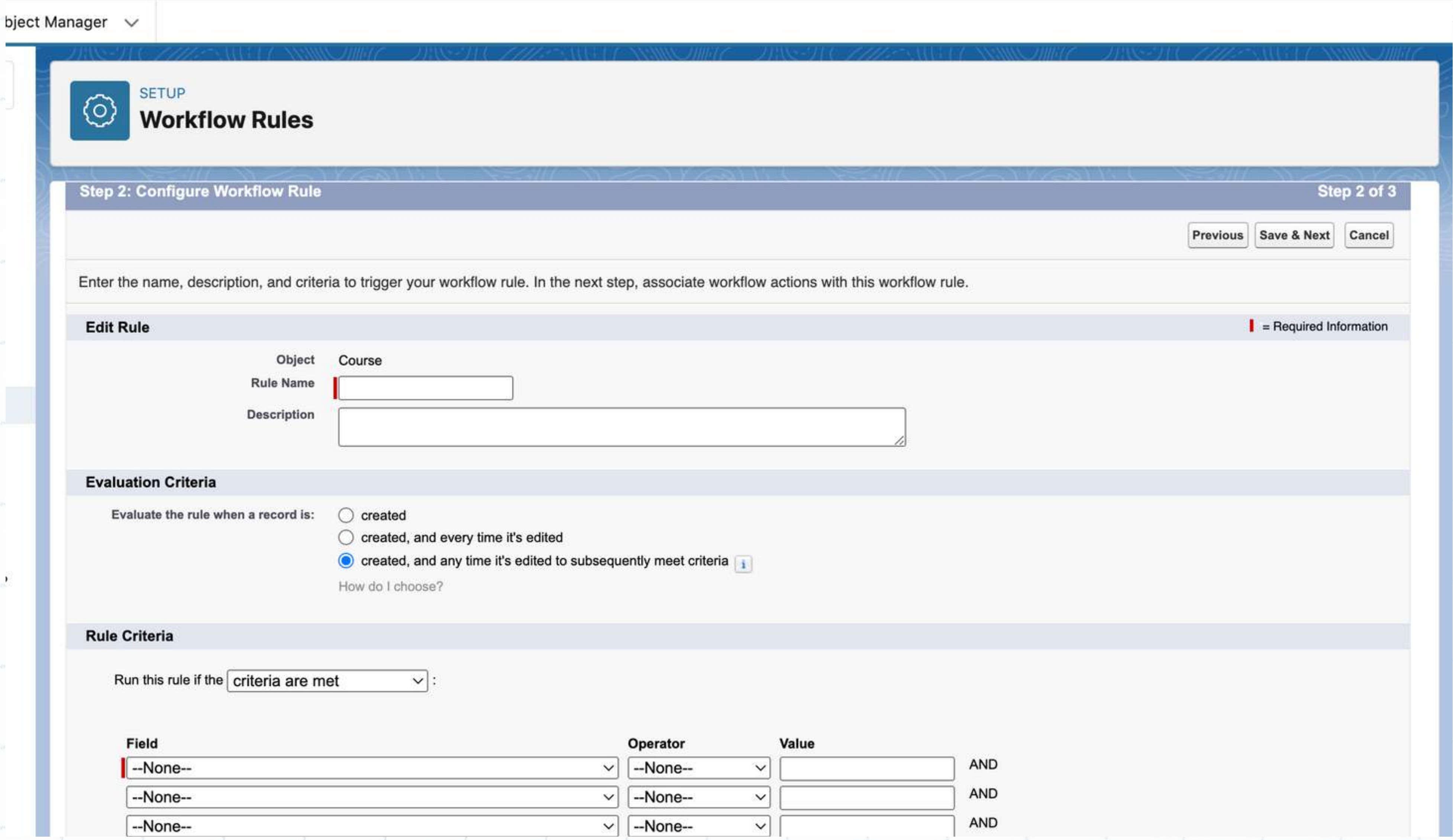
2

Navigate to Setup

3

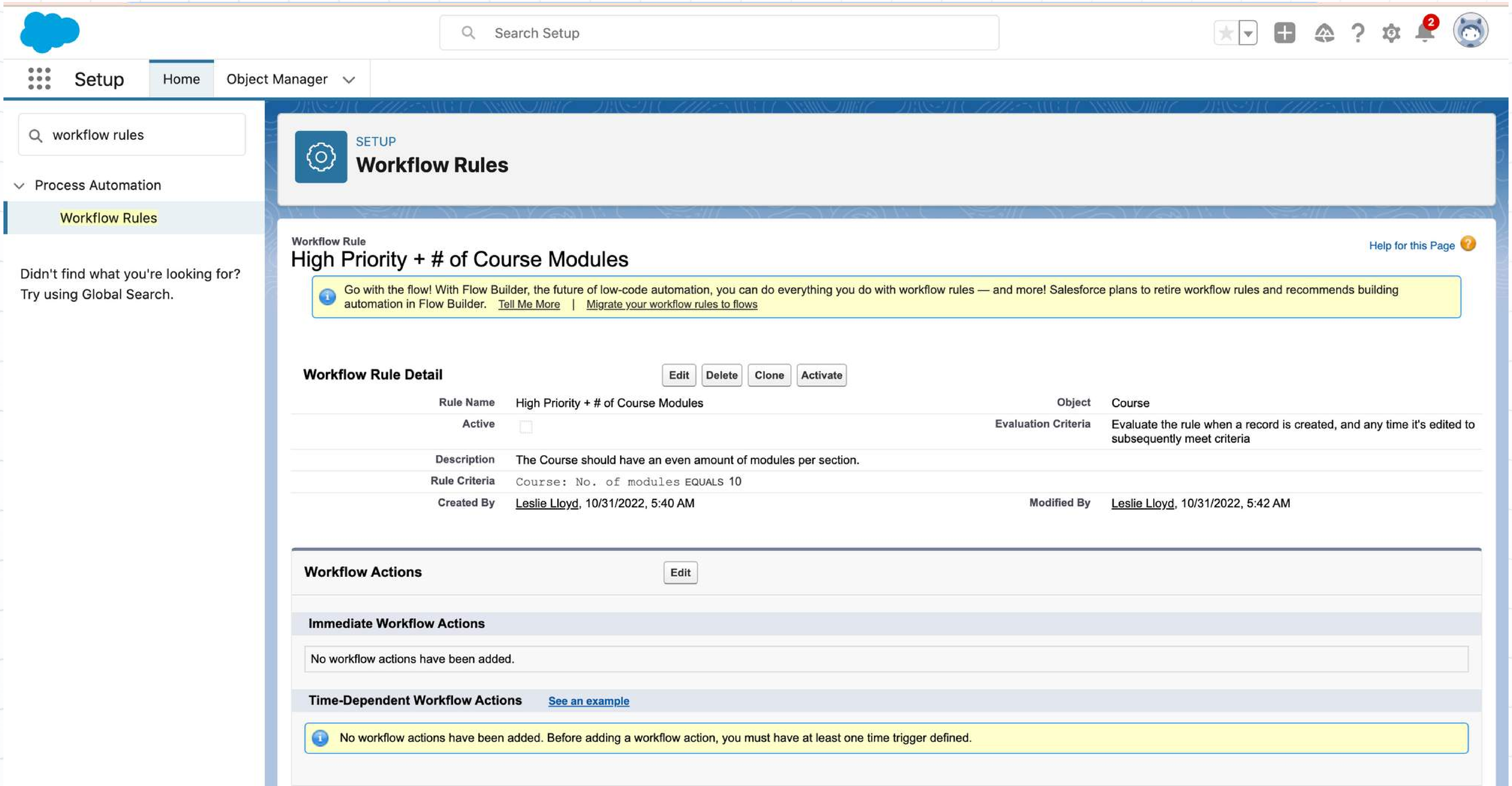
Fill out required fields > Save.





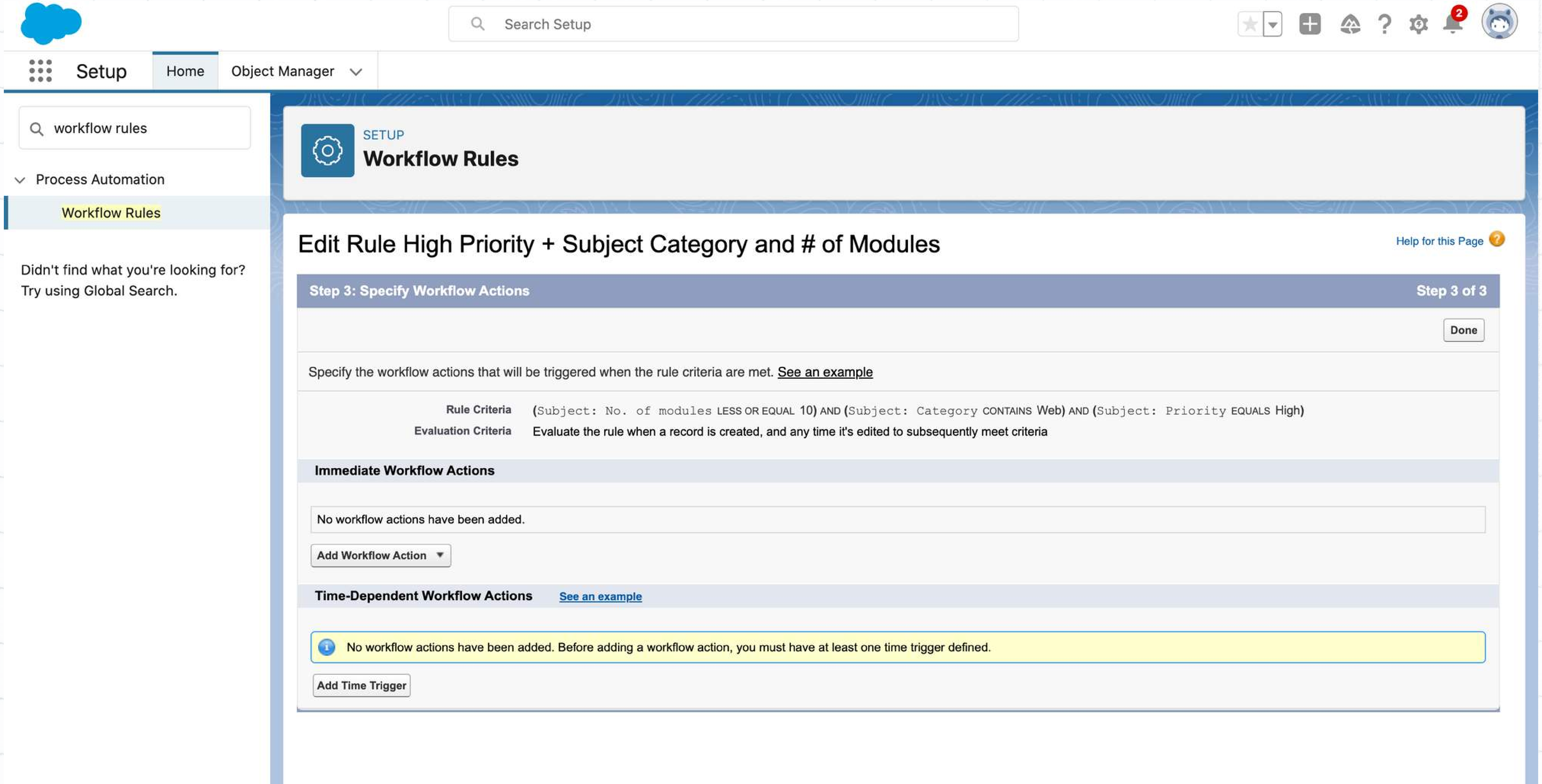
Course Workflow Rule

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



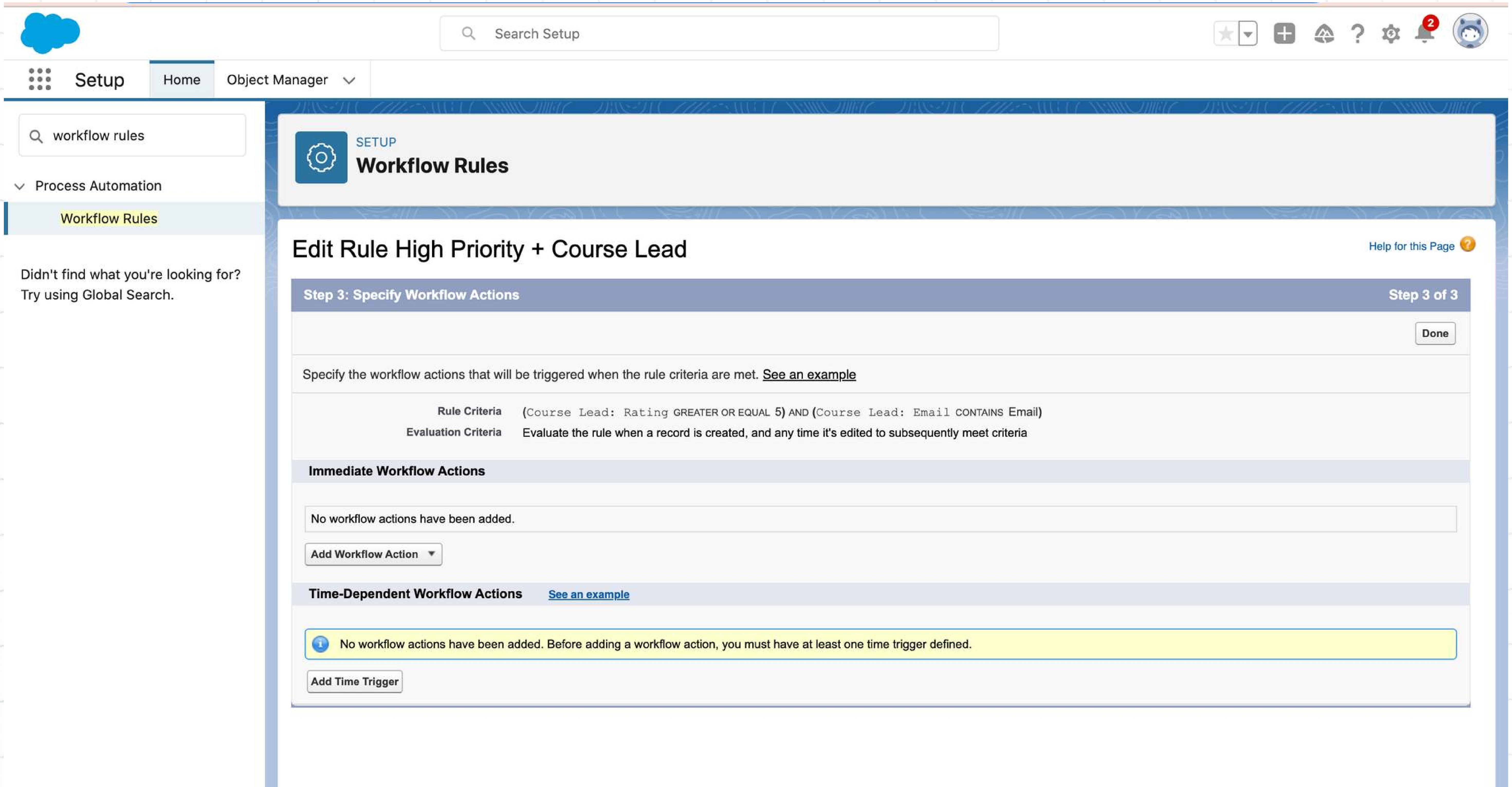
Workflow rules for Subject: Subject category should be 10 items overall on the web.

Subject Workflow Rules



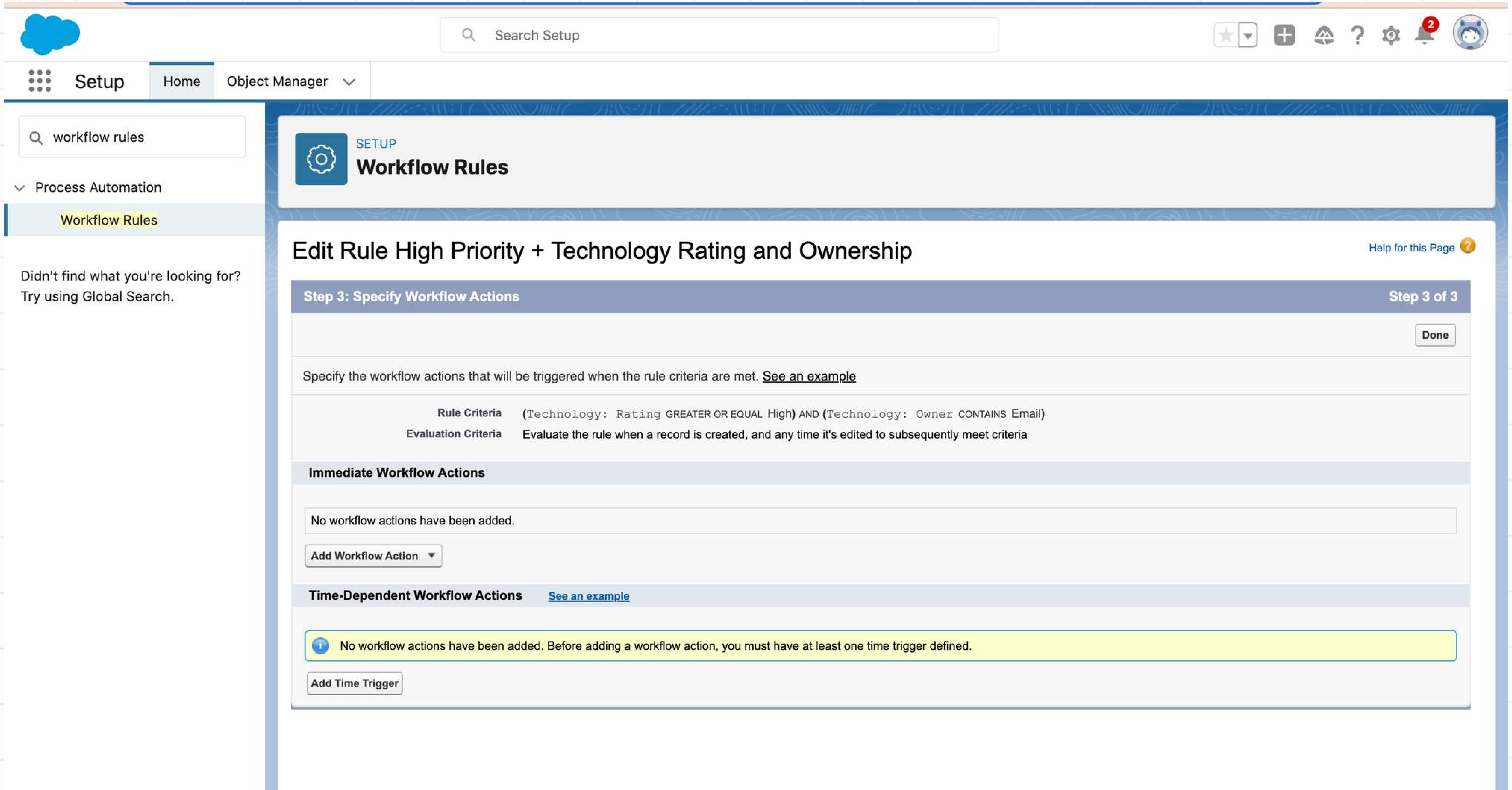
Workflow rules for Course Lead: Course Lead must have a high rating and an email attached.

Course Lead Workflow Rules



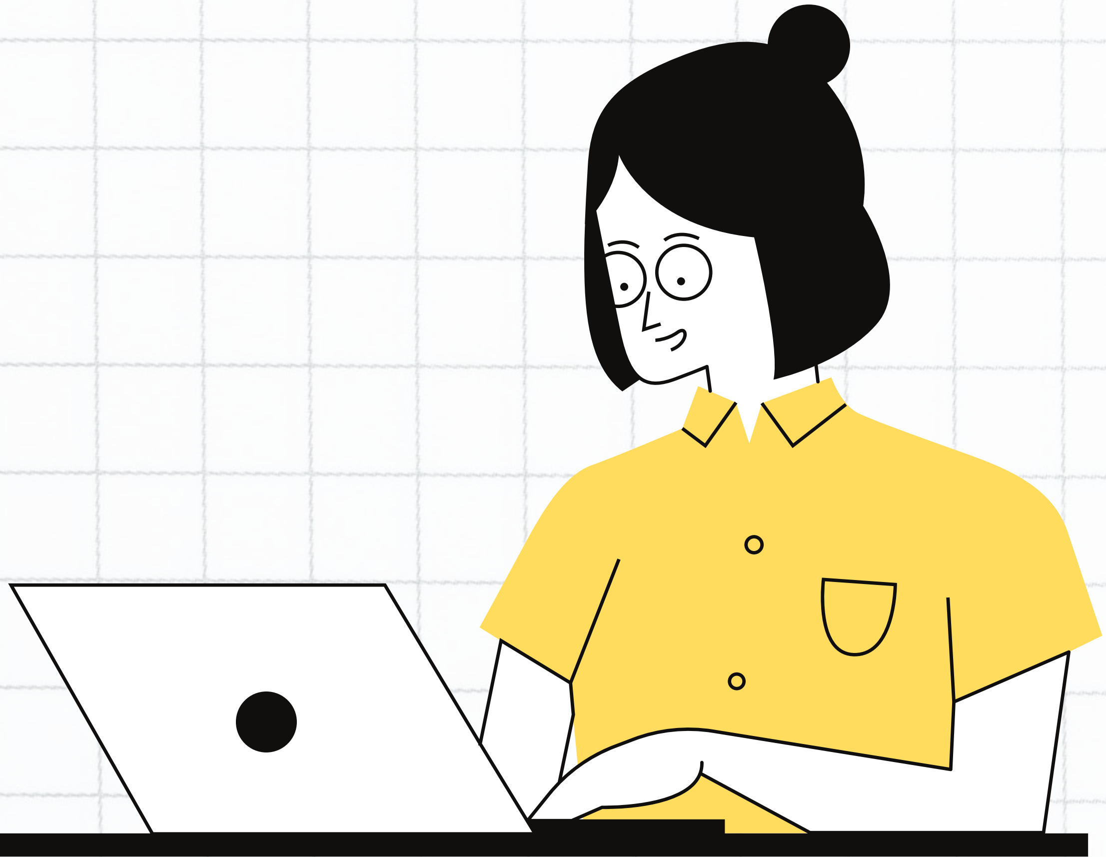
Workflow rules for Technology: Technology should be rated highly and owner should contain an email (Course Lead)..

Technology Workflow Rules



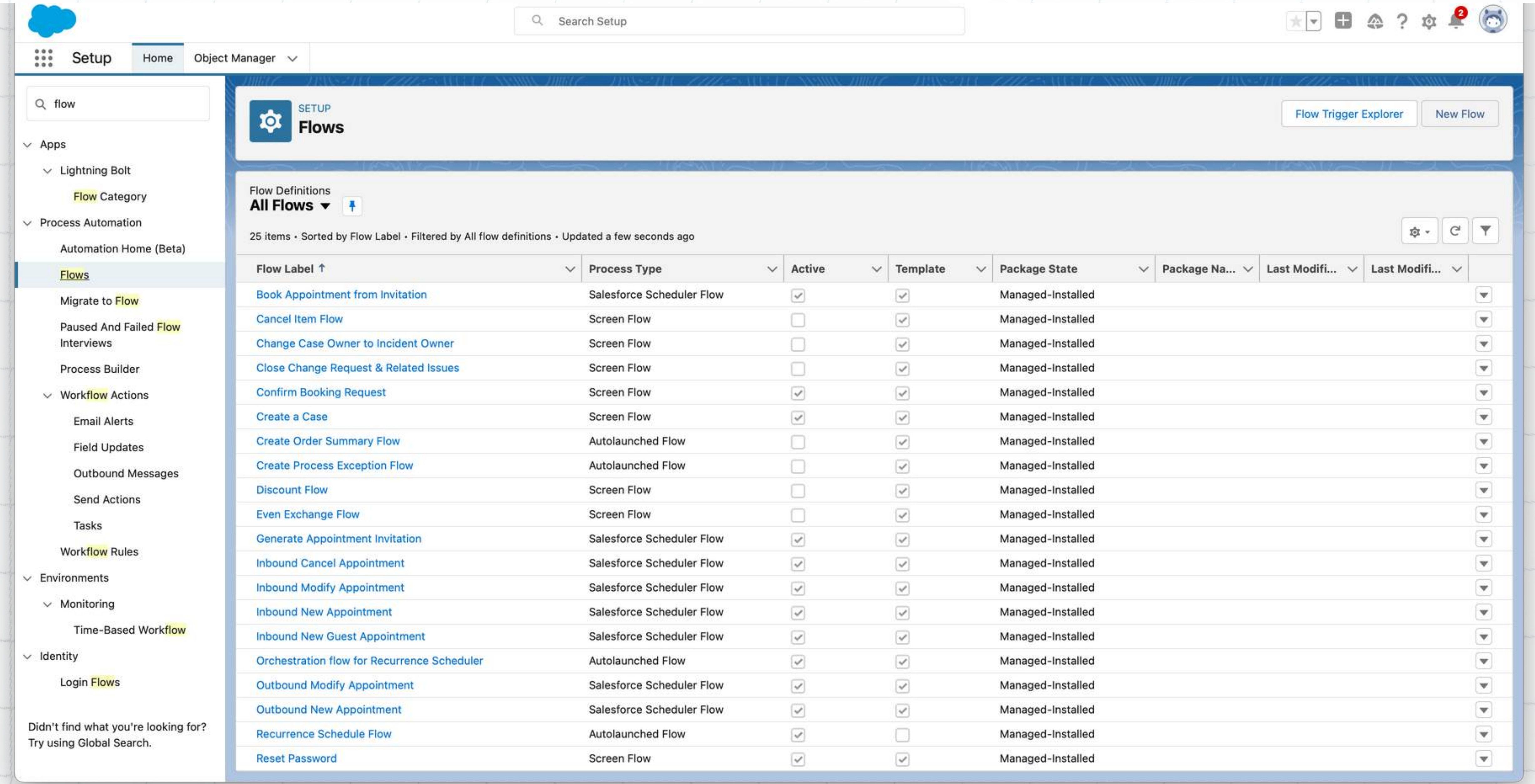
Flow Creation

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



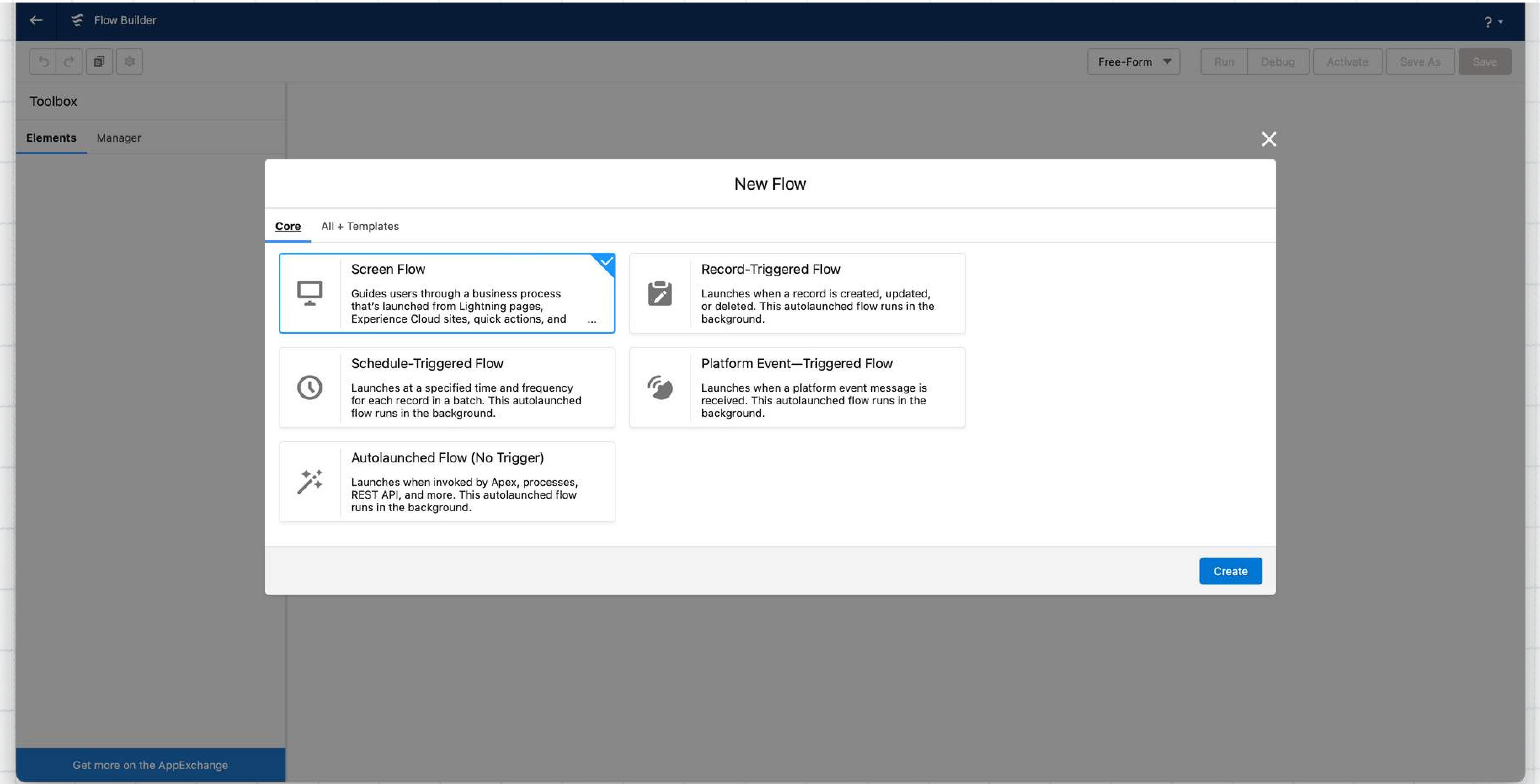
Flow Creation

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



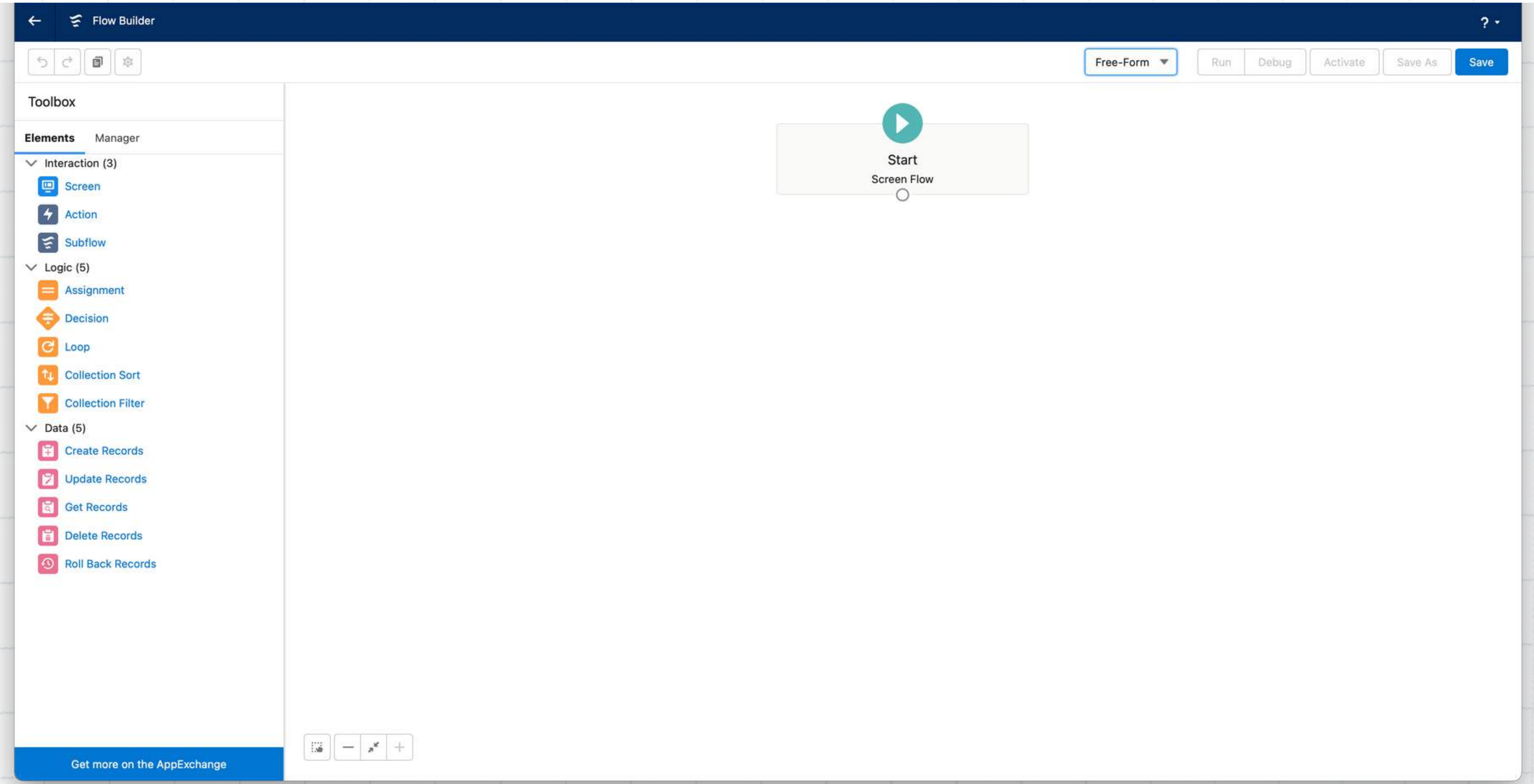
Flow Creation

4 Select Screen Flow and click Done



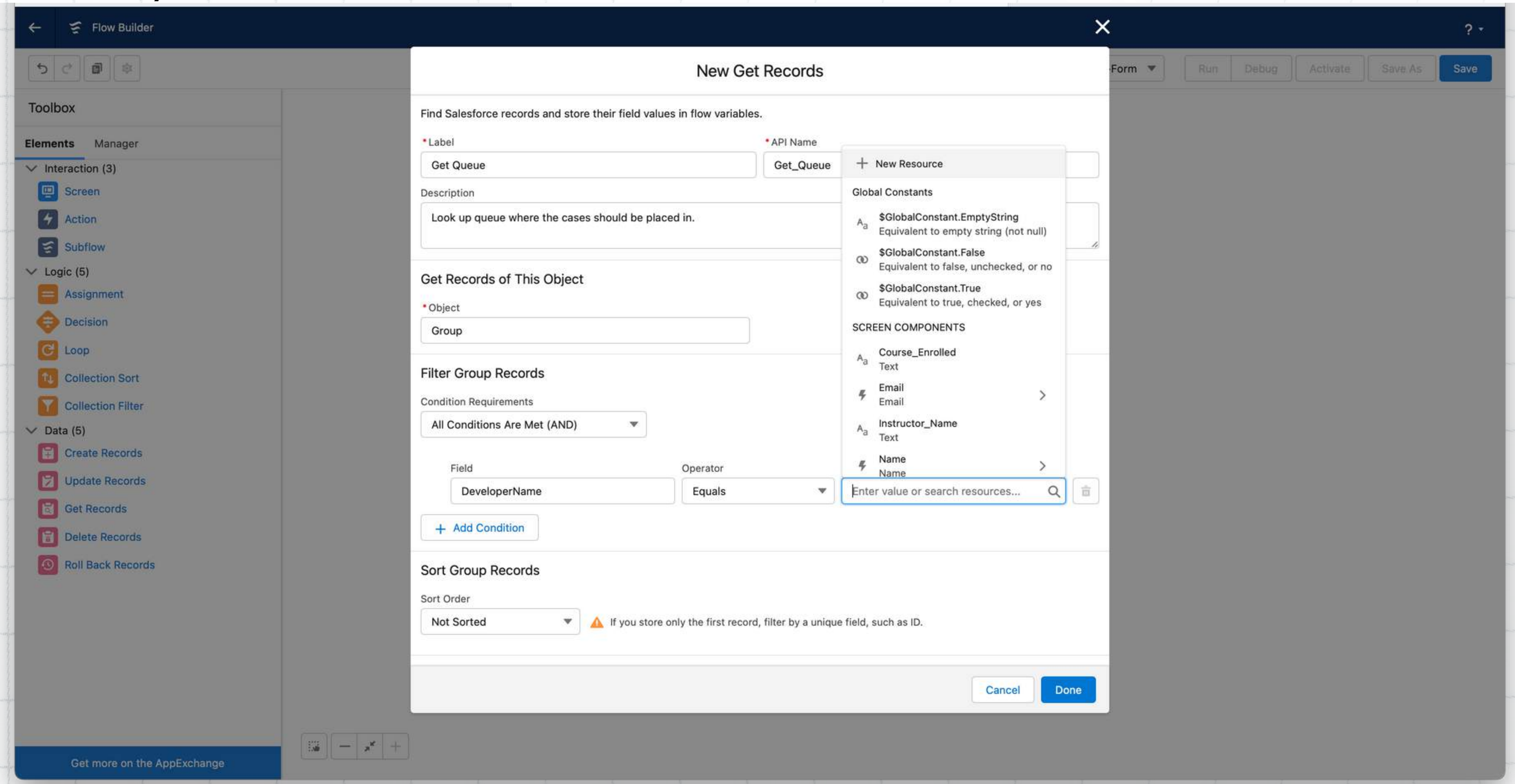
Flow Creation

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



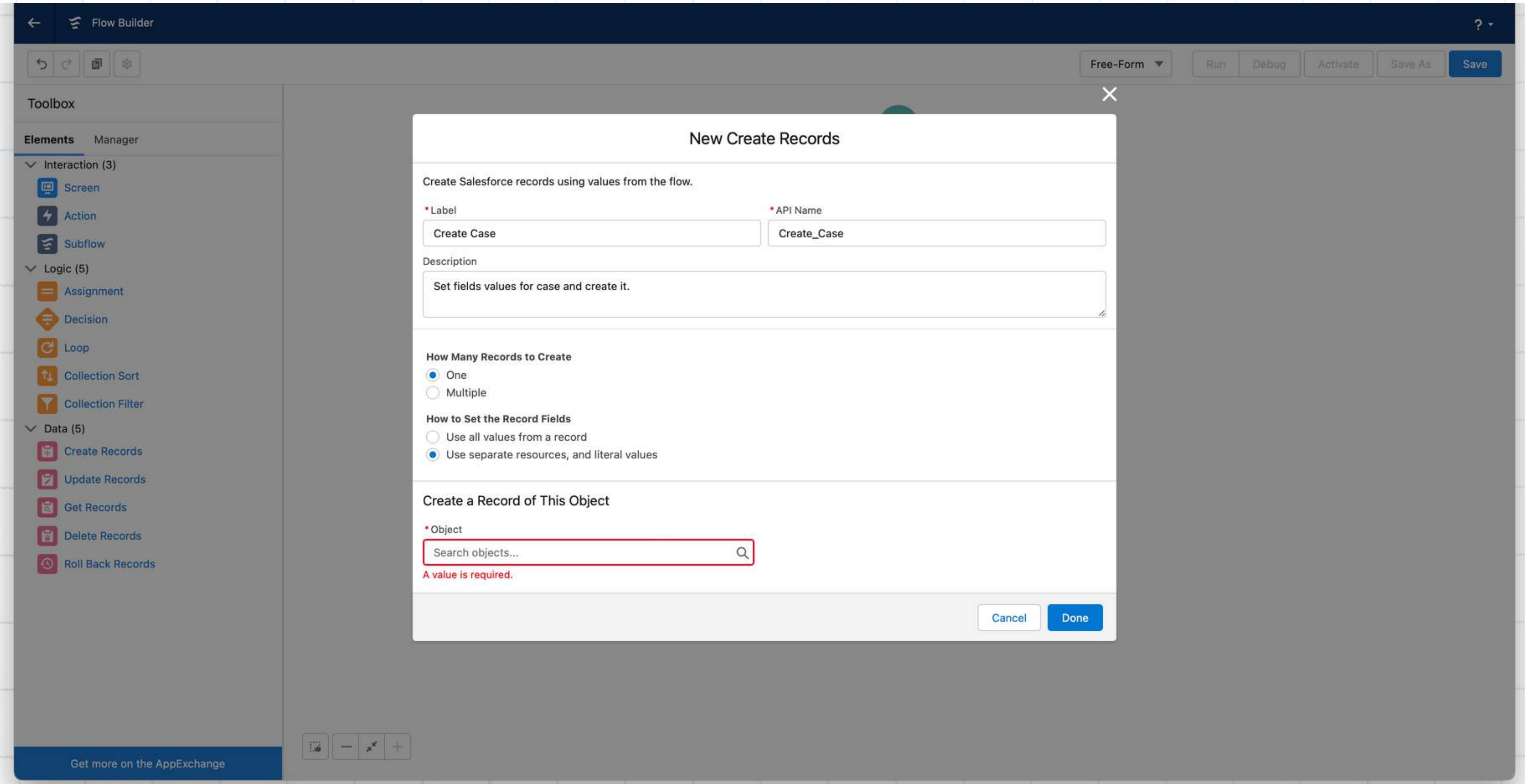
Flow Creation

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



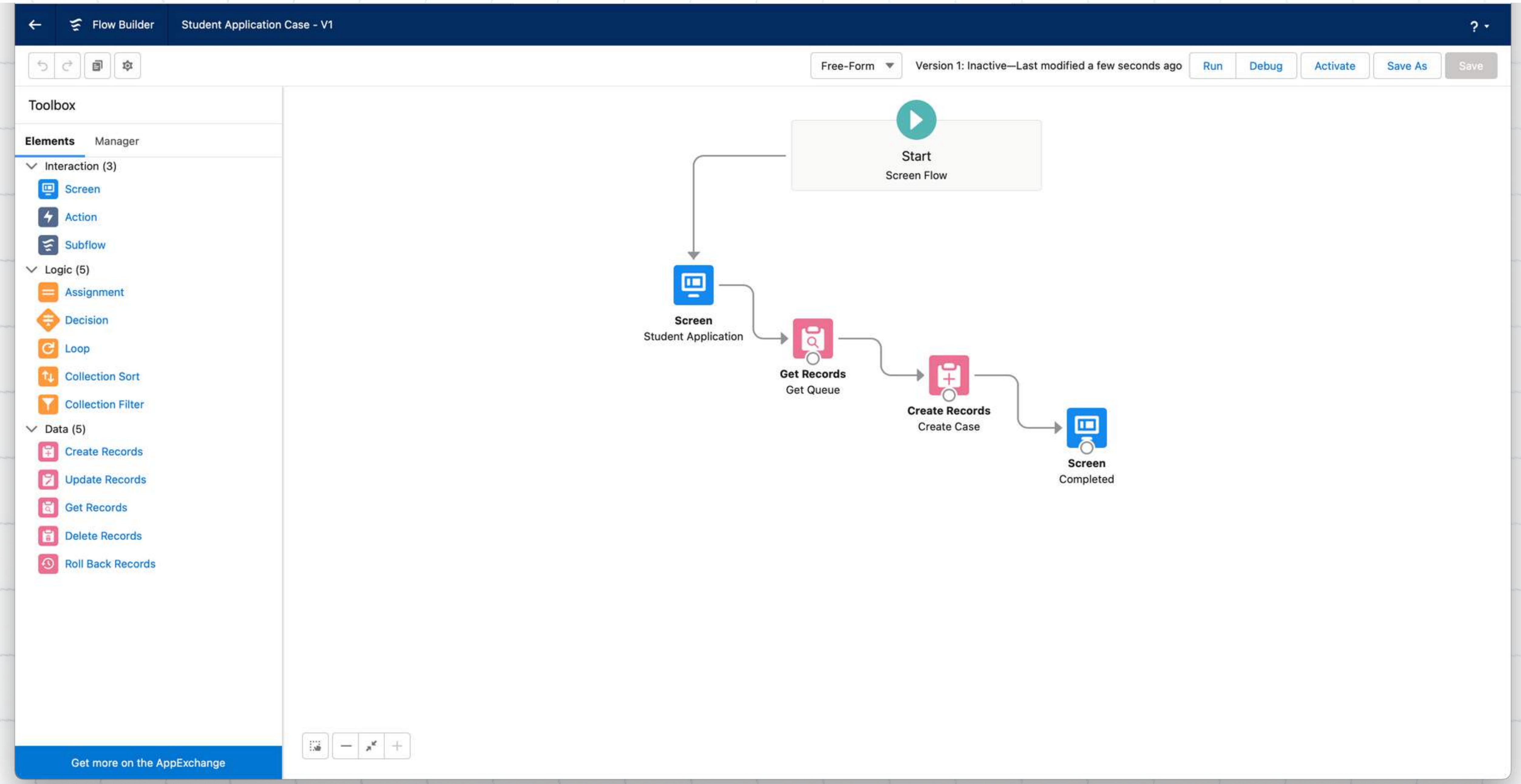
Flow Creation

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.



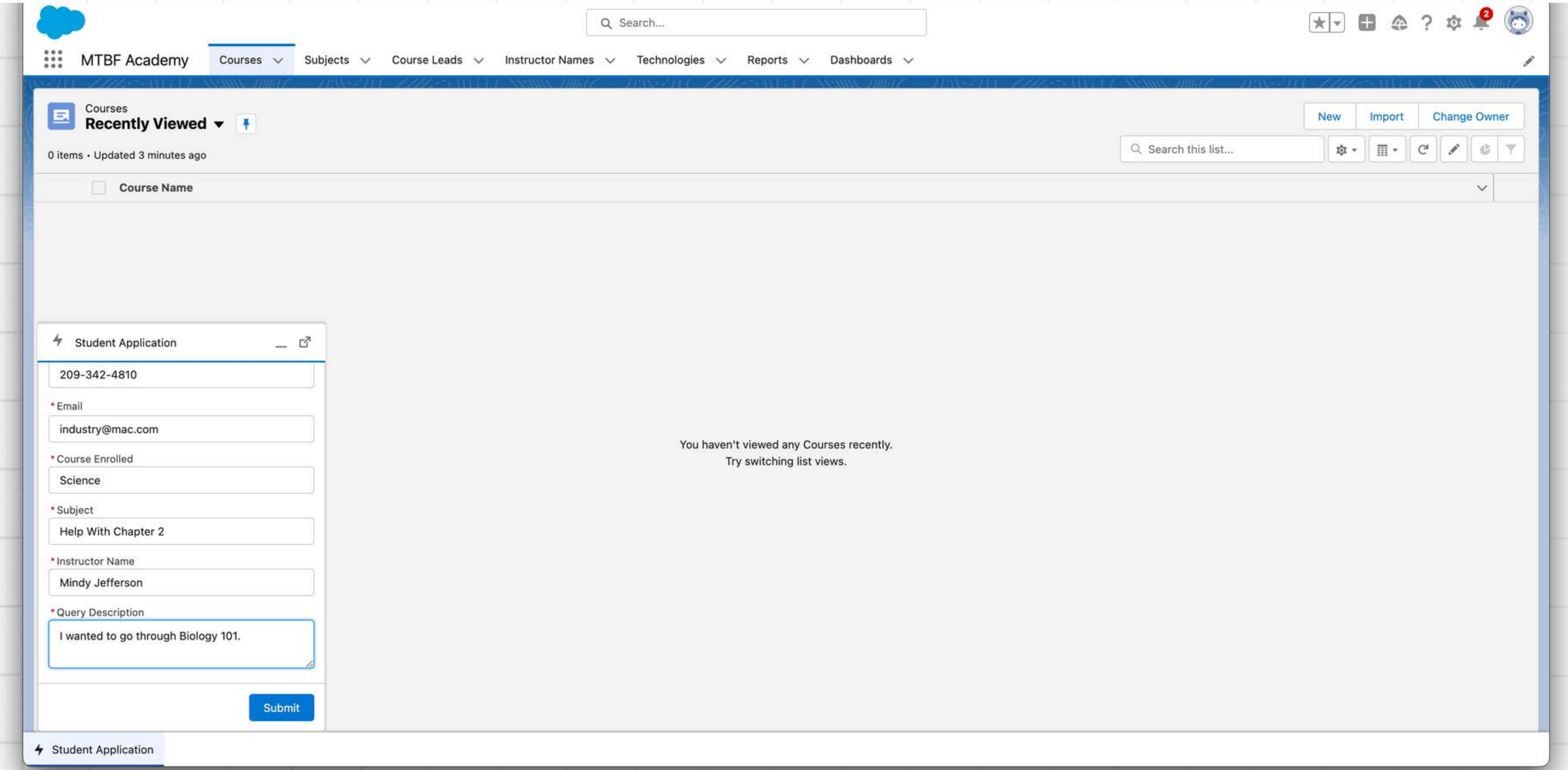
Flow Creation

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

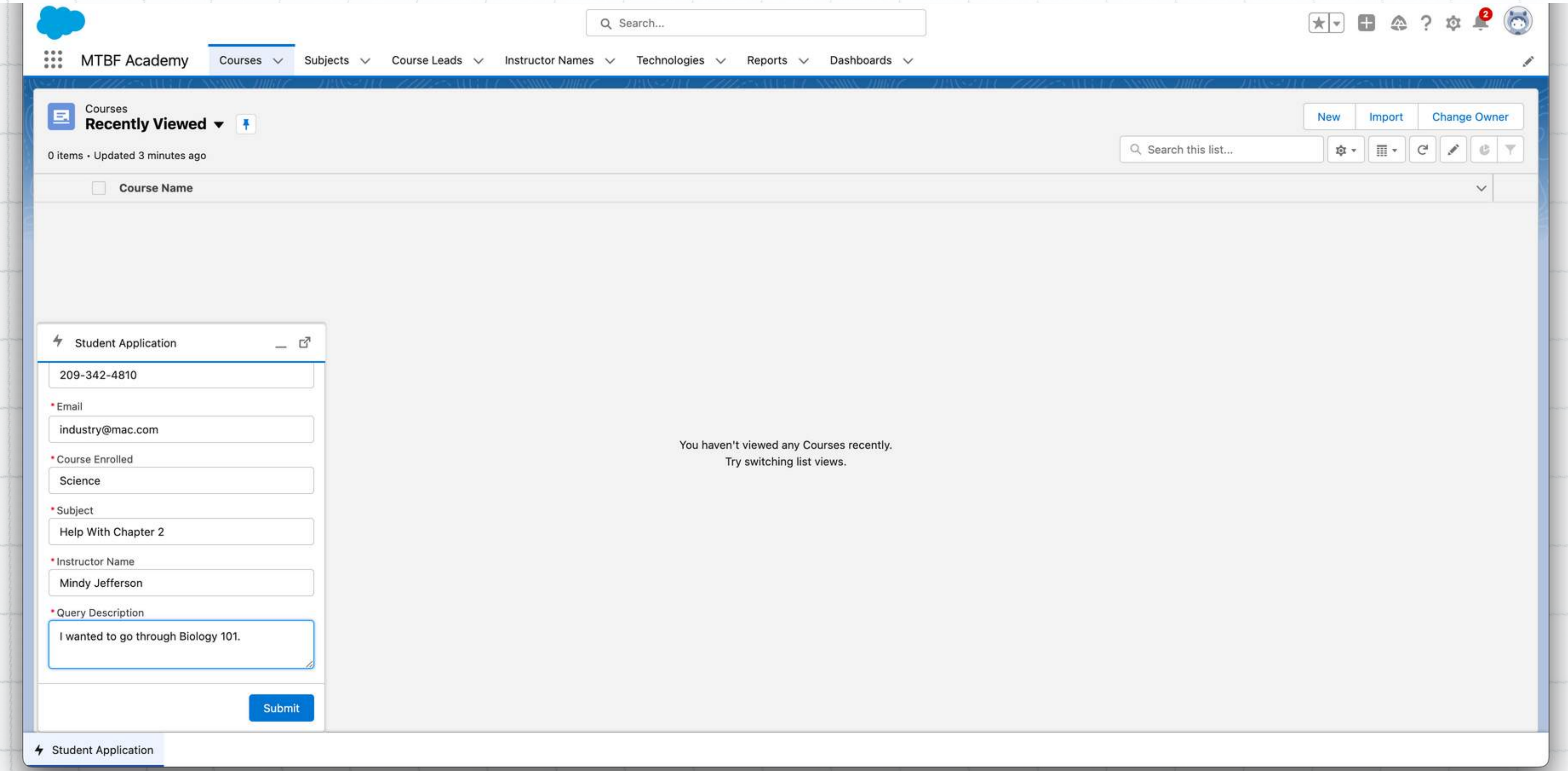
The student will type in the form and click submit. That will create a case for the Instructor to look into.



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.



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?