salesforce

SALESFORCE CAPSTONE: FLOW BUILDER
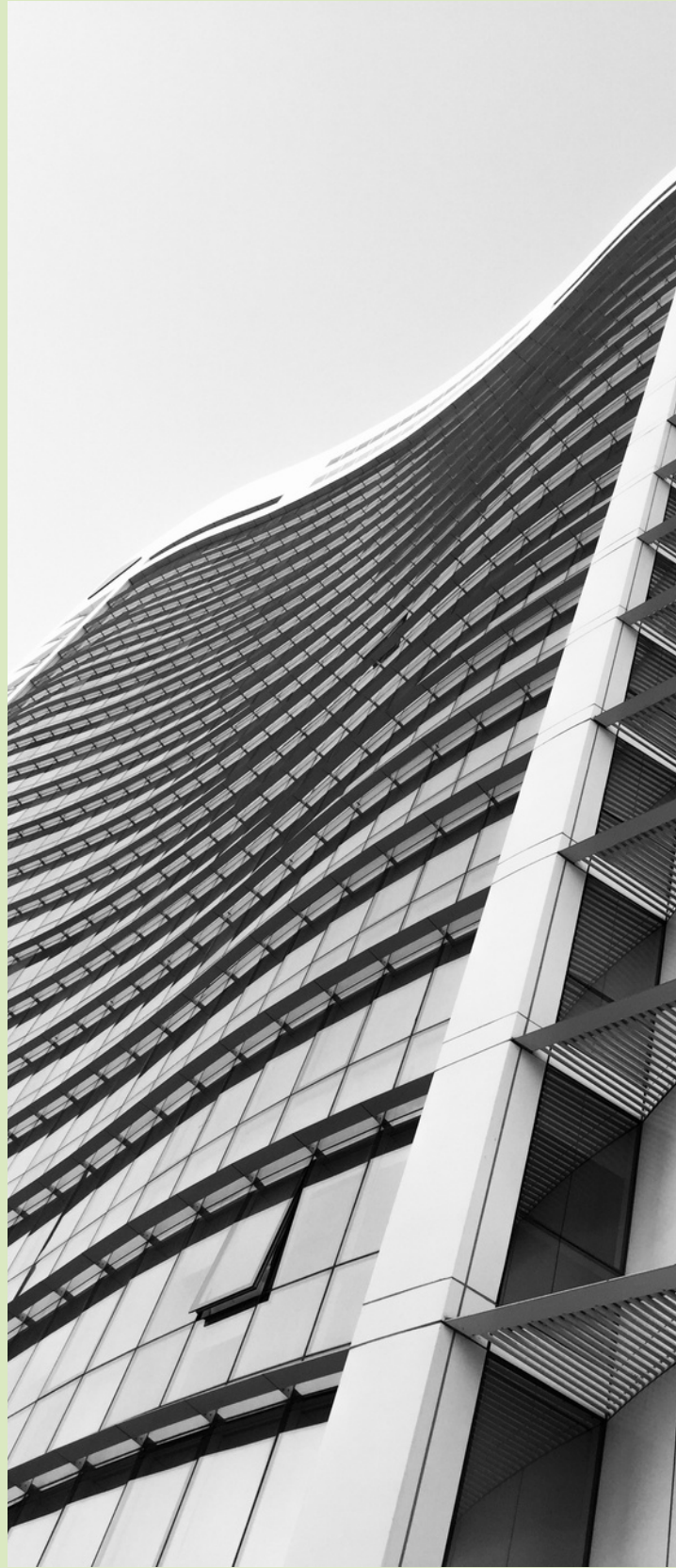
PROJECT PREPARED BY:

AMAKA ILOGBUNAM   KEIYANA JONES

CHIDERA ATUEGBU   SUSAN KOUDOU

JEAN-MAX CYPRIEN JR

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OVERVIEW

IN THIS PROJECT, WE CREATED FIVE CUSTOM OBJECTS AND FIELDS TO IMPLEMENT AND ENFORCE A FLOW FOR OUR ORGANIZATION TO ENSURE AUTOMATION OF TASKS INTERNALLY. IN ADDITION TO THE VARIOUS OBJECT AND FIELD CREATIONS, WE ALSO IMPLEMENTED VALIDATION RULES, WORKFLOWS, AND PROCESS BUILDERS FOR OUR CUSTOM OBJECTS. LASTLY, WE TESTED AND ACTIVATED THE FLOW FOR THIS ORGANIZATION

PROBLEM STATEMENT

In this project, we created basic components (objects, fields, etc.) for a more efficient business process in Salesforce using flows. Further, after creating the components for the basic layout of the flow we created a flow with various actions along with workflow rules and actions, validation rules, process builder, and flow builder. Then, added the flow into the action by activating it.

OBJECT CREATION

- IN **SETUP,** CLICK ON **OBJECT MANAGER**->CREATE-> **CUSTOM OBJECT**
- FILL OUT NECESSARY SECTIONS AND ASSIGN OBJECT TAB

SUBJECT

- REPEAT STEPS 1 & 2 FOR THE REST OF OBJECTS

COURSE LEADS

- REPEAT STEPS 1 & 2 FOR THE REST OF OBJECTS

OBJECT CREATION

IN SETUP, CLICK ON OBJECT MANAGER–>CREATE–> CUSTOM OBJECT
FILL OUT NECESSARY SECTIONS AND ASSIGN OBJECT TAB

TECHNOLOGY

- REPEAT STEPS 1 & 2 FOR THE REST OF OBJECTS

COURSE

- REPEAT STEPS 1 & 2 FOR THE REST OF OBJECTS

FIELD CREATION

IN YOUR **CUSTOM OBJECT** –> CLICK **FIELD AND RELATIONSHIPS**
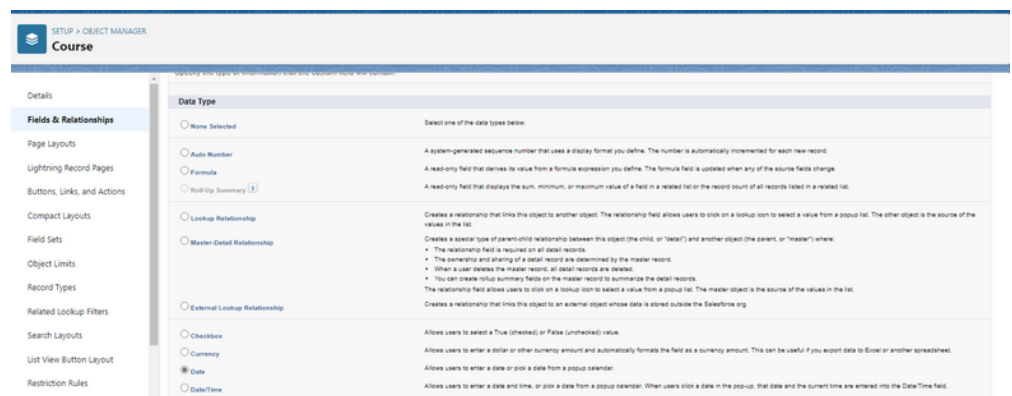

1

- IN YOUR **CUSTOM OBJECT** –> CLICK **FIELD AND RELATIONSHIPS** –> CLICK NEW ON THE RIGHT
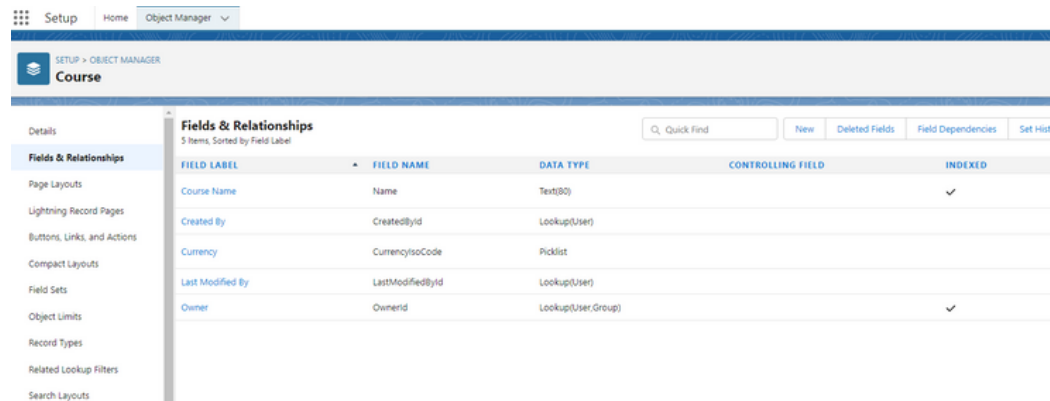
2

- IN FIRST SCREEN, YOU ARE DIRECTED TO CHOOSE A **FIELD TYPE** TO SPECIFY THE TYPE OF INFORMATION THAT THE CUSTOM FIELD WILL CONTAIN

FIELD CREATION CONT.

3

- IN THE SECOND SCREEN, YOU WILL ENTER **DETAILS** FOR YOUR CUSTOM FIELD. HERE YOU CAN ADD A **LABEL, DESCRIPTION, HELP TEXT, MARK THE FIELD REQUIRED & ADD A FORMULA** FOR DEFAULT VALUE

4

- IN THE THIRD SCREEN, YOU ESTABLISH **FIELD–LEVEL SECRUITY**. SELECT THE PROFILES TO WHICH YOU WANT TO GRANT EDIT ACCESS TO THIS FIELD VIA **FIELD–LEVEL SECURITY.** THE FIELD WILL BE HIDDEN FROM ALL PROFILES IF YOU DO NOT ADD IT TO FIELD–LEVEL SECURITY.

- IN THE FOURTH SCREEN, YOU SELECT THE PAGE LAYOUTS THAT SHOULD INCLUDE THIS FIELD AND **SAVE!**

VALIDATION RULES FOR VERIFYING DATA

1 SUBJECT

- Go to the object manager. In this instance, click **Subject**–> **fields & relationships.**
- **Take note of custom fields created previously & the data type.
- On the left side panel, scroll down to validation rules. Click **new**
  - ****Repeat steps for the rest of val. rules**

2 TECHNOLOGY

- As indicated above, go to the **Object Manager**. In this instance, click **Technology** –> **Fields & Relationships.**
- Validation rule formulas are selected based on data type.
  - Group validation rules together to make things easier

VALIDATION RULES FOR VERIFYING DATA CONT.

3   **COURSE**

- Repeat Validation Rules, Steps 1 & 2 for **Course** object.

4   **COURSE LEADS**

- Repeat Validation Rules, Steps 1 & 2 for **Course Leads** object.

SETTING WORKFLOW RULES

1. Course

- In Home Setup, type **Flow** into the search bar and click **New Flow**.
- Select **Record Trigger Flow** and select Create.
- Chose **Course** as your object and trigger a flow when an object is created or update
- Set condition requirements as **All Conditions are Met (AND)**
- Field: **Priority__c**
- Operator: **Equals**
- Value: **Hot**
- Click **Done**

- Click the **+** icon under run immediately and select **Update Records** under data
- Label: **Course Priority**
- API Name: **Course_Priority**
     Set Filter Conditions
- **All Conditions Are Met (And)**
- Field: **Priority__c**
- Operator: **Equals**
- Value: **Hot**
    Set Field Value for Course Record
- Field: **Course_name__c**
   New Resource to be created for value
- Select value search bar and select **New Resource**
- Resource Type: Formula
- API Name: **High_Priority_Course**
- Data Type: **Text**
- Formula: **"High Priority" + {!$Record.Course_name__c},**
- Check Syntax, **Done, Done**
- Select **Debug**
- Click **Save**
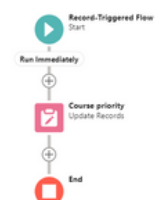
SETTING WORKFLOW RULES CONT.

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2   TECHNOLOGY

- Repeat the previous steps for the **Technology Flow**

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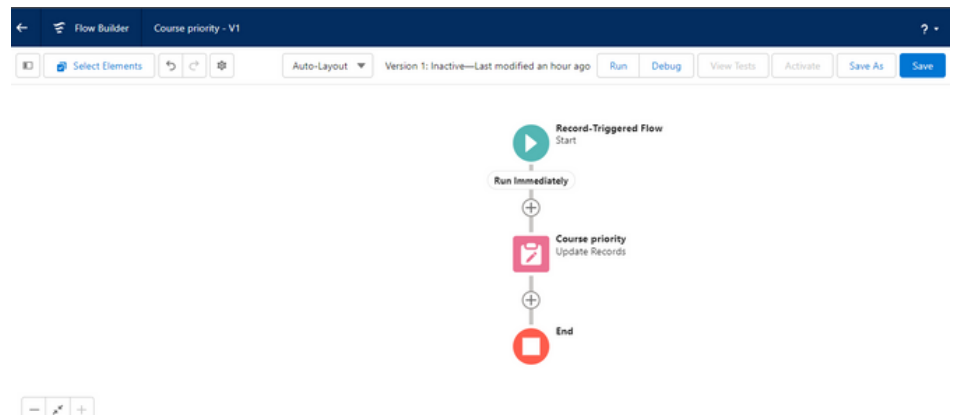
3   SUBJECT

- Repeat the previous steps for the **Subject** object
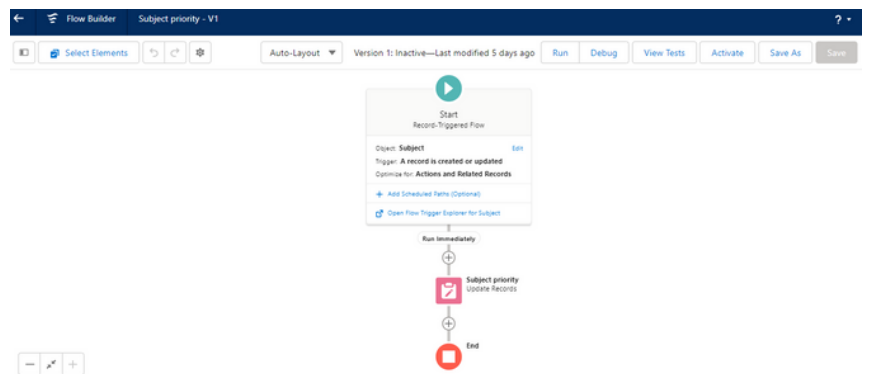
SETTING WORKFLOW RULES CONT.

4 **COURSE LEAD**

- In Home Setup, type **Flow** into the search bar and click **New Flow**.
- Select **Record Trigger Flow** and select Create.
- Chose **Course Leads** as your object and trigger a flow when an object is created or update
- Set condition requirements as **All Conditions are Met (AND)**
- Field: **Course_Lead_Amount__c**
- Operator: **Greater Than**
- Value: **1000**
- Click **Done**

- Click the + icon under run immediately and select Update Records under data
- Label: **Top Priority**
- API Name: **Top_Priority**

Set Filter Conditions

- **All Conditions Are Met (And)**
- Field: **Course_Lead_Amount__c**
- Operator: **Greater Than or Equal To**
- Value: **1000**

Set Field Value for Course Record

- Field: **Name**

New Resource to be created for value

- Select value search bar and select New Resource
- Resource Type: Formula
- API Name: Top_Priority_Course
- Data Type: Text
- Formula: **""Top Priority Customer" + {!$Record.Name}},**
- Check Syntax, Done, Done
- Select Debug
- Click Save
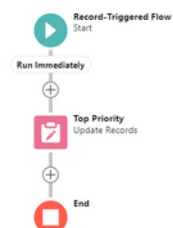
CREATING A FLOW

1

- IN YOUR SETUP PAGE, GO TO **FLOW** –> CLICK **NEW FLOW**
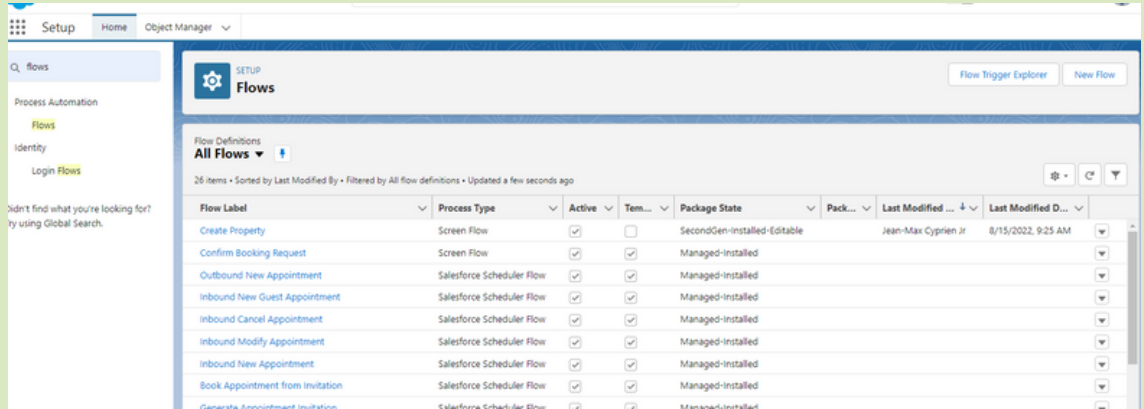
2

- In the **New Flow** window, select the desired flow template for your workflow.
- Here, for each Object's flow, '**Record-Triggered Flow**' was selected to ensure flow runs in the background.
  - **Note**: Salesforce is phasing out the usage of the 'Workflow Rules' on the platform. While Flow Builder was used as an alternative, the yielded flow result is unaffected.
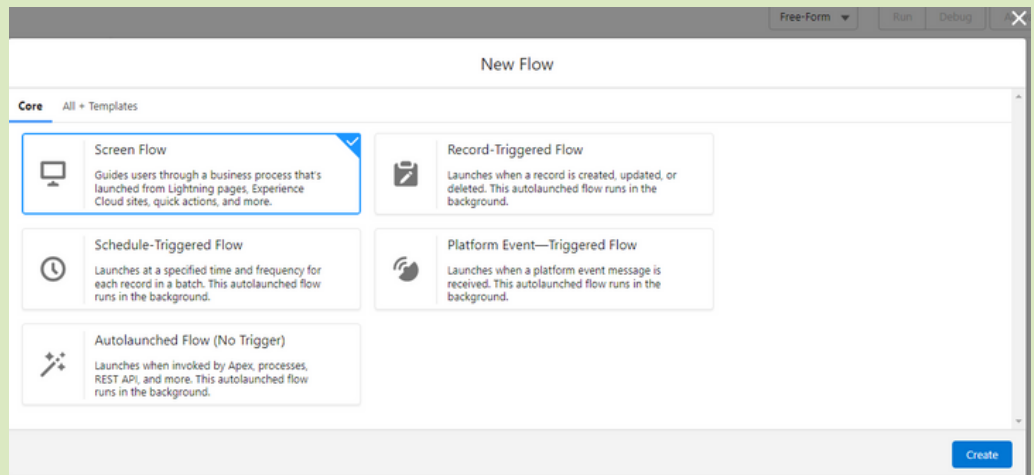
3

- In the **Configure Start** window, select the desired trigger for the flow.
- Here, the trigger implemented for each flow was "**A record is created or updated.**"

** The '**Record-Triggered Flow**' is the only flow type that contains the triggering event (create, update, or delete). It runs automatically when a record is created, updated, or deleted.
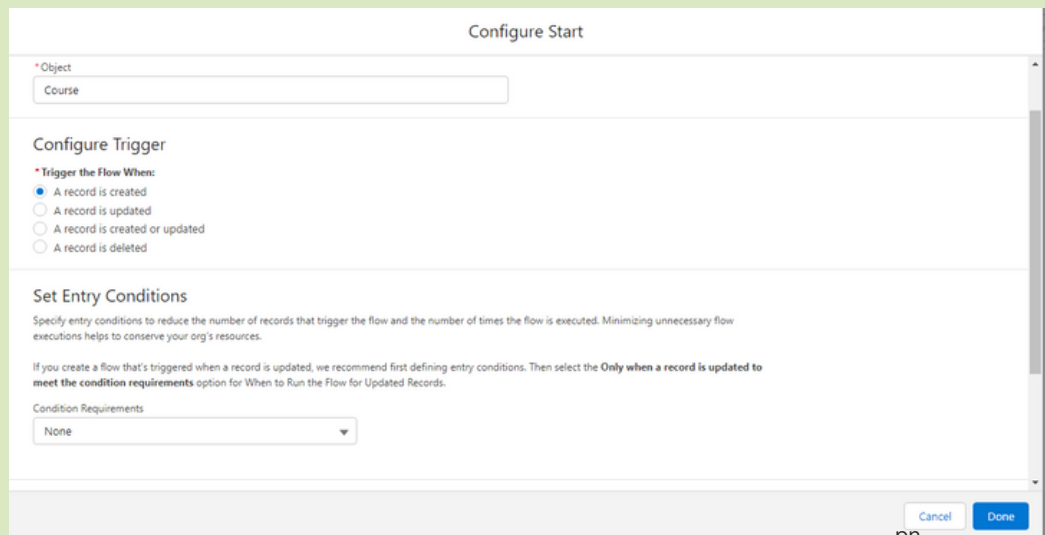
CREATING A FLOW CONT.

4

- After selecting your desired flow type, you will observe that that the flow is generated on the flow builder window.
- In the **Flow Builder** window, select '**Add Element**' then select the action most appropriate for the next step of your flow.
- Here, the element we chose for our flow is '**Get Records**'

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- In the **Edit Get Records** window, select the **Object** you desire to work on, then filter to the appropriate condition.
- Here we selected '**All Conditions are Met**'
- Select the **Fields, Operator,** and **Value** that are consistent with this section of your flow then select '**Done**'
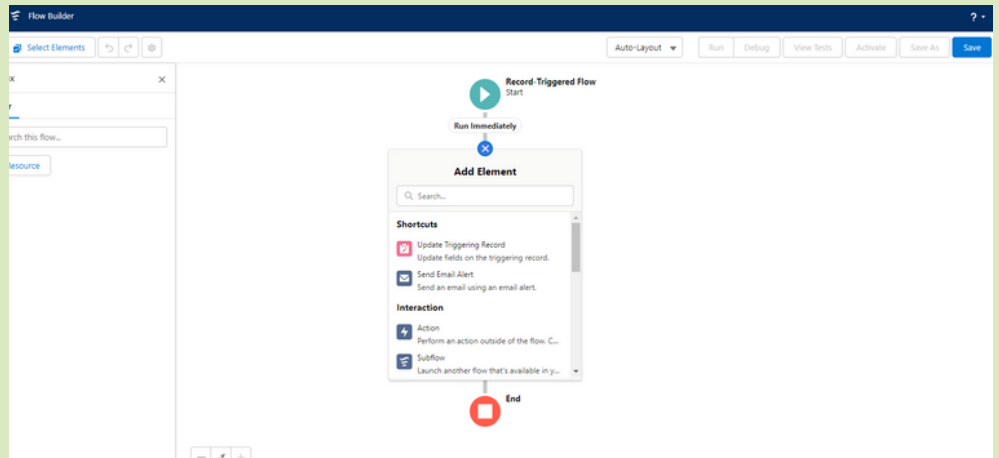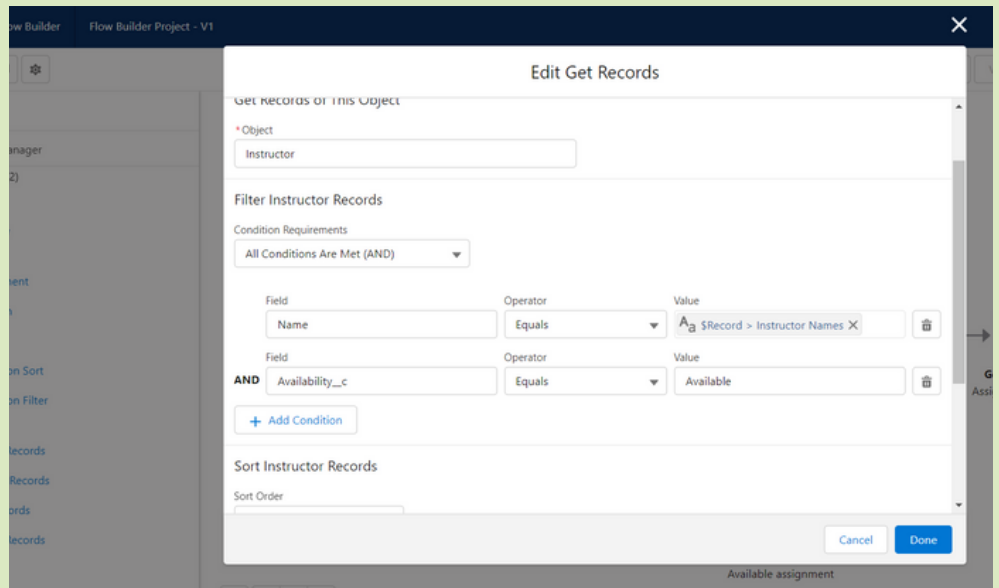

6

- In the **Edit Decision** window, type in the **Label Object** you desire and be sure that an **Outcome API Name** is generated, then filter to the appropriate condition.
- Here we selected '**All Conditions are Met**'
- Select the **Resource, Operator,** and **Value** that are consistent with this section of your flow then select '**Done**'

CREATING A FLOW CONT.

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- In the **Edit Assignment** window, ensure that you are editing the assignment for the Assigned Instructor.
- Select the **Variable, Operator,** and **Value** that are consistent with this section of your flow then select '**Done**'
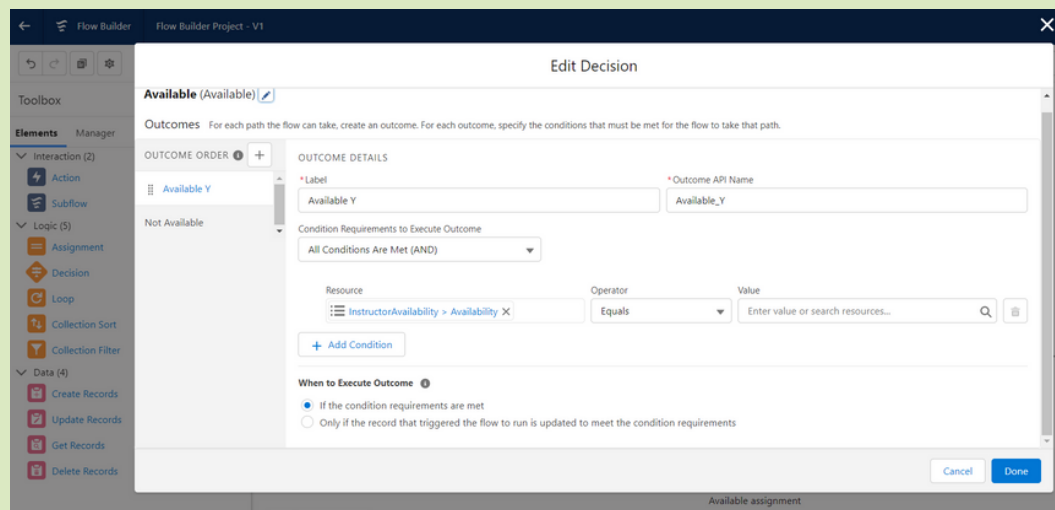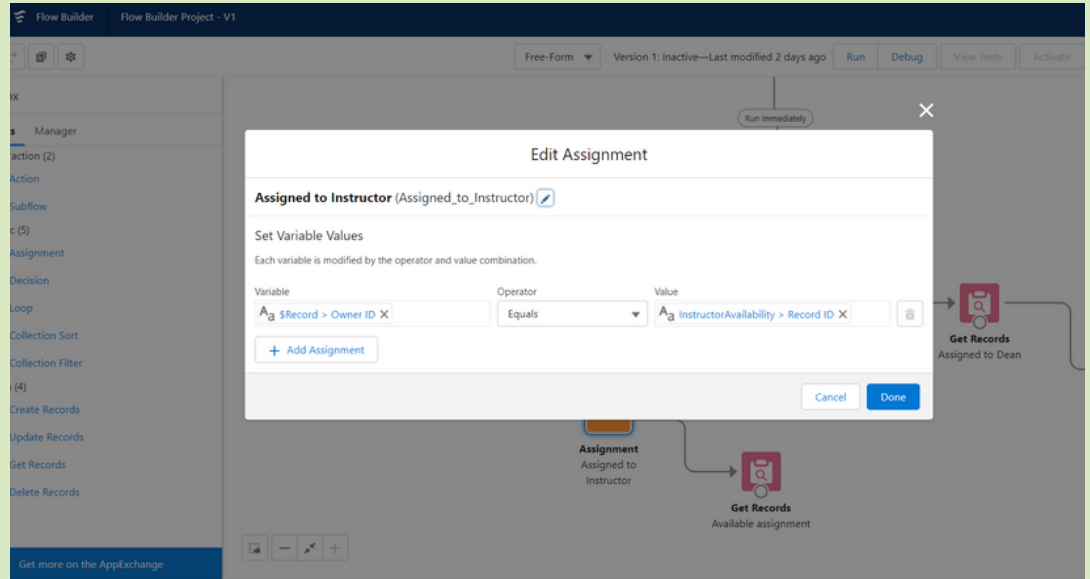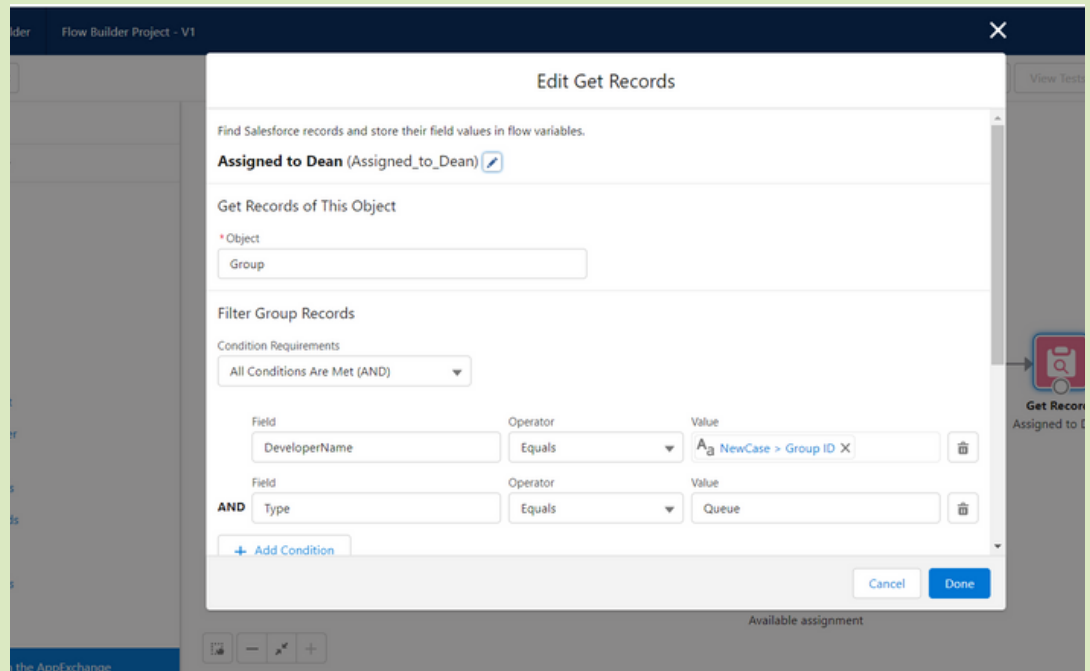

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- In the **Edit Get Records** window, select the **Object** you desire to work on, then filter to the appropriate condition. Here we selected the '**Group**' object
- Then select the condition requirements. Here '**All Conditions are Met**' is the chosen condition for this part of the flow.
- Select the **Fields, Operator,** and **Value** that are consistent with this section of your flow then select '**Done**'

9

- In the **Edit Assignment** window, ensure that you are editing the assignment for the Assigned to Dean.
- Select the **Variable, Operator,** and **Value** that are consistent with this section of your flow then select '**Done**'
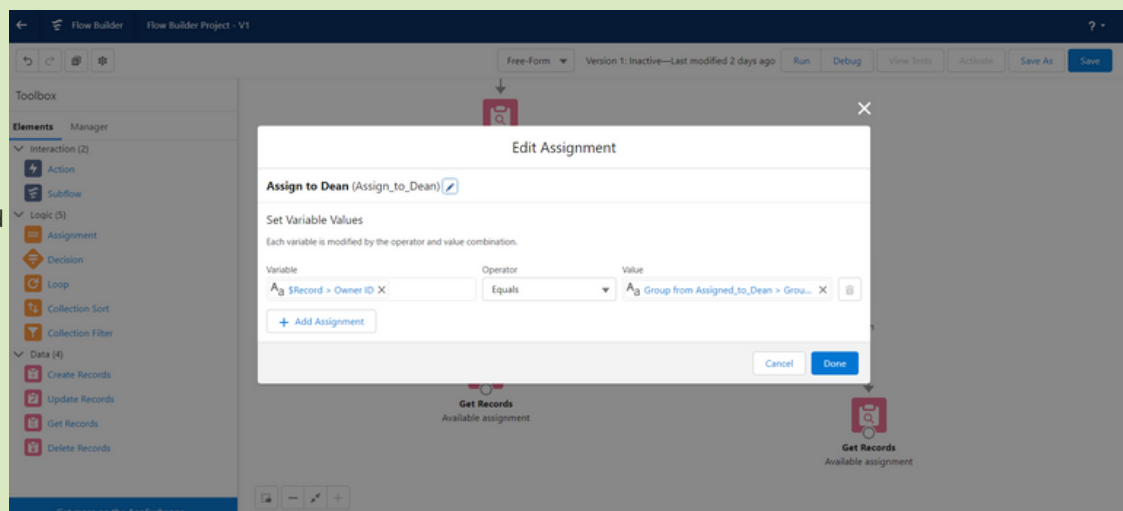
CREATING A FLOW CONT.

10

- In the **Edit Get Records** window, select the **Object** you desire to work on, then filter to the appropriate condition. Here we selected the '**Instructor**' object
- Then select the condition requirements. Here '**All Conditions are Met**' is the chosen condition for this part of the flow.
- Select the **Fields, Operator,** and **Value** that are consistent with this section of your flow then select '**Done**'
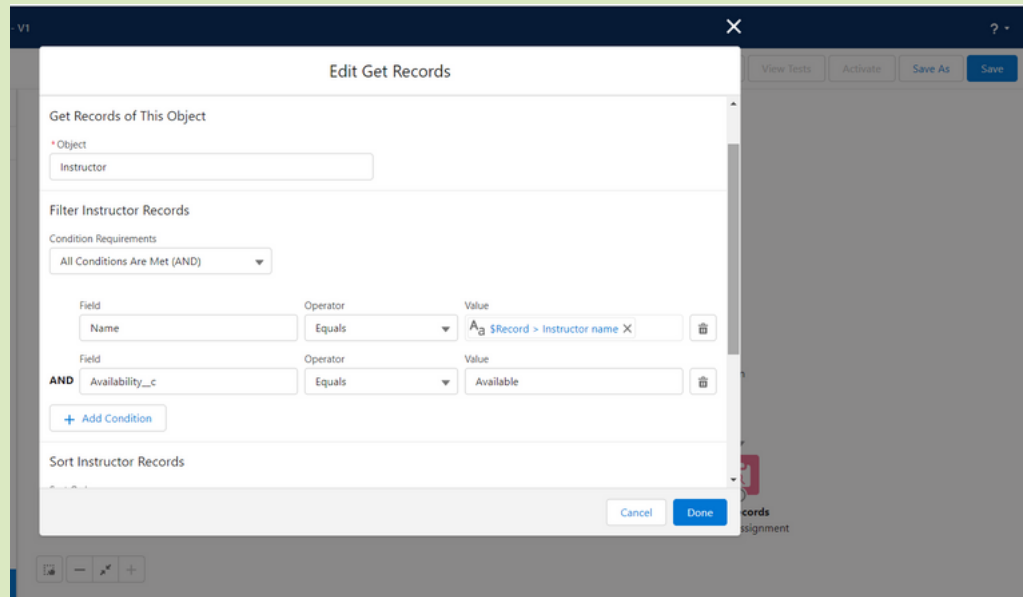
11

- Review the Flow created.
- **Debug** the flow to ensure that there are no errors populated.
- Assign a **Name** to the completed flow, then **Save**.
- If you are happy with the flow build, then **Activate** the flow.