

BUILD PACE P FLOST SALES 



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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

New Custom Object		
Permissions for this object are disabled for	all profiles by default.	You can enable object permissions in permission sets or by editing custom profiles. Tell me morel Don
Custom Object Definition Edit		Save Save & New Cancel
Custom Object Information		
The singular and plural labels are used in tabe, pa Label Plural Label Starts with vowel sound The Object Name is used when referencing the ob Object Name	ge layouts, and reports Subject Subjects ject via the API. Subject	Example: Account Example: Accounts Example: Account
Description	Onen the standard	4 Salasfora con Mah & Talaina windaw
etter ette	Open a window u	sing a Visualforce page

### SUBJECT

• REPEAT STEPS 1 & 2 FOR THE REST OF OBJECTS

Subject			
Details	Details	Edit D	Selete
Fields & Relationships Page Layouts	Description		
Lightning Record Pages	API Name Subject c	Enable Reports	
Buttons, Links, and Actions	Custom	Track Activities	
Field Sets	Singular Label Subject	Track Field History	
Object Limits	Plural Label Subjects	Deployment Status Deployed	
Record Types		Help Settings Standard salesforce.com Help Window	
Related Lookup Filters Search Layouts			
List View Button Layout			

### **COURSE LEADS**

Course Leads			~
Details	Details		Edit
Fields & Relationships Page Layouts	Description		
Lightning Record Pages	API Name	Enable Reports	
Buttons, Links, and Actions	Custom	Track Activities	
Compact Layouts	<b>~</b>	✓ ▼	
Field Sets	Course Leads	rrack Held History ✓	
Object Limits	Plural Label Course Leads	Deployment Status Deployed	
Record Types		Help Settings	
Related Lookup Filters		Standard salestorce.com Help Window	
Search Layouts			

 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**

- SETUP > OBJECT MANAGER Technology Details Edit Delete Details Fields & Relationships Description Page Layouts Lightning Record Pages API Name Enable Reports Technology\_\_c Buttons, Links, and Actions Track Activities Custom Singular Label Technology ~ Compact Layouts Track Field History Field Sets ~ Plural Label Technologies Deployment Statu Object Limits Deployed Record Types Help Settings Standard salesforce.com Help Window Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules
- REPEAT STEPS 1 & 2 FOR THE **REST OF OBJECTS**

### COURSE

#### Details Details Fields & Relationships Description Page Layouts Lightning Record Pages API Name Course\_\_c Buttons, Links, and Action Custom ~ Compact Layouts Singular Label Field Sets Plural Label Courses Object Limits

SETUP > OBJECT MANAGER

Record Types

Related Lookup Filters

	Edit	Delete
Enable Reports		
~		
Track Activities		
Track Field History		
Deployment Status		
Deployed		
Help Settings		
Standard salesforce.com Help Window		

#### • REPEAT STEPS 1 & 2 FOR THE **REST OF OBJECTS**

### FIELD CREATION

#### IN YOUR CUSTOM OBJECT -> CLICK FIELD AND RELATIONSHIPS

# IN YOUR CUSTOM OBJECT -> CLICK FIELD AND RELATIONSHIPS -> CLICK NEW ON THE RIGHT

Setup Home Ob SETUP > OBJECT MANAGER Course	ject Manager 🗸	T New Just Just			JANSI (CZZZENACTON
Details	Fields & Relationships 5 Items, Sorted by Field Label		٩	Quick Find New Deleted Field	s Field Dependencies Set Hist
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Course Name	Name	Text(80)		~
Lightning Record Pages	Created By	CreatedByld	Lookup(User)		
Buttons, Links, and Actions	Currency	CurrencylsoCode	Picklist		
Field Sets	Last Modified By	LastModifiedById	Lookup(User)		
Object Limits	Owner	Ownerld	Lookup(User,Group)		~
Record Types					
Related Lookup Filters					
Search Laurude					

#### 2

•

1

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

#### SETUP > OB Course Details Data Type Fields & Relationships O None Selected Page Layouts Auto Numbe Lightning Record Pages OFormula Buttons, Links, and Action Compact Layouts Field Sets emined by the master record. onts are deleted. ecord to summarize the detail on to select a value from a po Object Limits Record Types Or. Related Lookup Filters Search Layouts Ochec Allows users to enter a dollar or other ourrency amount and autor List View Button Layout Linux users to enter a data or nick a data from a nonun nalandar · Date Restriction Rules

### FIELD CREATION CONT.

### 3

4

 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

Details	New Custom Field		Help for this Page
Fields & Relationships	Step 2. Enter the details		Step 2 o
Page Layouts			Previous Next Car
ightning Record Pages	Field Label	Start Date	
Buttons, Links, and Actions			
Compact Layouts	Field Name Description	Start_Date 1	
Field Sets			
Object Limits	Help Text	I	
lecord Types			
kelated Lookup Filters	Required Auto add to custom report type	Advays require a value in this field in order to save a record  Advays require a value in this field to existing custom report types that contain this entity	
earch Layouts	Default Value	Show Formula Editor	
id March days Land			

- 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!

SETUP > OBJECT MANAGER		
Details	New Custom Field	Help for this Page 🕹
Fields & Relationships	Stan 3: Fetabilah field lawal security	Step 3 of 4
Page Layouts	Self of Channel Height Security	Previous Next Carrel
Lightning Record Pages		(THERE ) (MAR) CARE
Buttons, Links, and Actions	Field Laber Start Date Data Type Date	
Compact Layouts	Field Name Start_Date Description	
Field Sets	Select the profiles to which you want to grant edit access to this field-level security. The field will be hidden from all profiles if you do not add it to field-level security.	
Object Limits	Field-Level Security for Profile	Read-Only
	Analytics Cloud Integration User	0
Record Types	Analytics Cloud Security User	0
Related Lookup Filters	Authenticated Website	0
Search Laurude	Authenticated Website	0
Search Cayoota	Contract Manager	0
List View Button Layout	Cross Org Data Proxy User	0
Restriction Rules	Custom: Marketing Profile	0
Courses Dates	Custom: Sales Profile	0
scoping notes	* Cratum Scould Dolla 10	0

### VALIDATION RULES FOR VERIFYING DATA

#### 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

etails	Subject Vali	dation Rule			
ields & Relationships	BACK to SUDJECT				
age Layouts	Validation Rule De	tail	Edit Clone		
inhtning Record Pages	Rule Name	Verifying_datasubject		Active	1
uttons, Links, and Actions ompact Layouts ield Sets	Error Condition Formula	OR( ISBLANK(Instructor_Name_c), ISBLANK(o.0 (Modules_c), ISBLANK(o.0 (Modules_c), ISBLANK(subject_name_c), ISB/ICKVAL(Rating_c, "), ISP/ICKVAL(Rating_c, "), ISP/ICKVAL(Category_c, ")			
	Error Message	Field is required		Error Location	Top of Page
bject Limits	Description	Palastera File (001/0000 7-11 PM		Medified By	Coloring For AND 10000 7.11 PM
ecord Types	Created by	Same of the August of the State	Edit Clone	account by	300000000 PM0, 10/3//2022, 7.11 PM
alated Lookup Eilters					



- 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.

COURSE	SETUP > OBJECT MANAGER					
3	Details Fields & Relationships	Course Valid	lation Rule			
	Page Layouts	Validation Rule De	tail	Edit Clone		
	Lightning Record Pages	Rule Name	Verifying_datacourse1		Active	×
	Lightning Record Pages	Error Condition Formula	OR(			
	Buttons, Links, and Actions		ISBLANK(Instructor_Name_c), ISBLANK(Instructor_Name_c),			
Repeat Validation Rules, Steps 1 & 2	Compact Layouts		ISPICKVAL(Rating_c."), ISPICKVAL(Type_of_Course_c."), ISBILANK(Start_Gate_c), ISBILMBEPL No. of Mechan.c)			
for <b>Course</b> object.	Field Sets		ISBLANK(End_Date_c), ISPICKVAL(Active_c.")			
	Object Limits	Error Message	Field is required		Error Location	Top of Page
		Description				
	Record Types	Created By	Salesforce Five, 10/31/2022, 6:23 PM		Modified By	Salesforce Five, 10/31/2022, 6:23 PM
	Related Lookup Filters			Edit Clone		
	Search Layouts					
	List View Button Layout					
	Restriction Rules					
	Scoping Rules					
	Scoping Rules					



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

SETUP > OBJECT MANAGER Course Leads					
Details	Course Lea	ds Validation Rule			
Fields & Relationships	Back to Course Leads				
Page Layouts	Validation Rule De	ətail	Edit Clone		
Lightning Record Pages	Rule Name	Verifying_datacourseleads		Active	✓
	Error Condition Formula	OR(			
Buttons, Links, and Actions		ISPICKVAL( Category_c . "'), ISBLANK( Course_Lead_Amount_c ), ISBLANK( First Name_c ).			
Compact Layouts		ISBLANK( Last_Name_c ), ISBLANK( Phone_c ), ISBLANK( Fmail_c )			
Field Sets		ISBLANK( Source_c), ISPICKVAL( Rating_c, "), ISBLANK( Cumprov_c)			
Object Limits		)			
	Error Message	Field is required		Error Location	Top of Page
Record Types	Description				
Related Lookup Filters	Created By	Salesforce Five, 10/31/2022, 6:33 PM	Edit Clone	Modified By	Salesforce Five, 10/31/2022, 6:33 PM
Search Layouts					
List View Button Layout					
Persiation Poles					

### **SETTING WORKFLOW RULES**

#### 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

Select Object			
Select the object whose records trigger the flow when they're created, u	pdated, or deleted.		
Object			
Course			
Configure Trigger			
*Trigger the Flow When:			
A record is created			
A record is updated			
<ul> <li>A record is created or updated</li> </ul>			
A second is deleted			
A record is deleted			Cancel
	Configure Start	SERVED IN ANY MILLION A SAFANA IN	Cancel
A record is deleted	Configure Start	Service and America service is	Cancel
A record is deleted	Configure Start	perceute way when a record of	Cancel
A record is deleted If you create a non-main suggestion mean a record is opposited, the record updated to meet the condition requirements option for When to Rur Condition Requirements All Conditions Are Met (AND)	Configure Start	PERCENTE NUMBER OF THE OF T	Cancel
A record is deleted  If you create a non-main suggesta mean a record is opposing, we record updated to meet the condition requirements option for When to Rur Condition Requirements  All Conditions Are Met (AND)  Field	Configure Start	sence the way where near a second to	Cancel
A record is deterted  in you create a non-site or unggeted means a record of aquateco, the record updated to meet the condition requirements option for When to Run Condition Requirements  All Conditions Are Met (AND)  Field  Field  Priority_C	Configure Start	Value Hot	Cancel

- 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

Update records related to the course record Use the IDs and all field values from a record Specify conditions to identify records, and s	I that triggered the flow d or record collection et fields individually		
et Filter Conditions			
All Conditions Are Met (AND)			
Field	Operator	Value	
Priorityc	Equals	▼ Hot	<b></b>
+ Add Condition			
			Cancel Done

Cancel

Field	Operator	Value	
Priority_c	Equals	▼ Hot	<b>a</b>
+ Add Condition			
t Field Values for the Course Record			
t Field Values for the Course Record		Value	
t Field Values for the Course Record d iourse_name_c	•	Value A High_Priority_Course ×	Î
t Field Values for the Course Record d 'ourse_name_c + Add Field		Value - Å <sub>a</sub> High_Priority_Course ×	

Row Budder Course priority-V1
 Select Dements
 C ( Atto:Layout V Version t: Inactive—Last modified an hour age Run Debug Version: Activitie Service Service Service



# SETTING WORKFLOW RULES CONT.

#### 2 TECHNOLOGY

Repeat the previous steps for the Technology
 Flow



#### **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

Select Object Select the object whose records trigger the flow when they're created, up * Object Course Leads	dated, or deleted.				
Select the object whose records trigger the flow when they're created, up. *Object Course Leads	dated, or deleted.				
*Object Course Leads					
Course Leads					
Configure Trigger					
* Trigger the Flow When:					
A record is created					
A record is updated					
<ul> <li>A record is created or updated</li> </ul>					
				Cancel	Don
	Configure	Start			
Entry Conditions					
y entry conditions to reduce the number of records that trigger the fi	low and the number of times th	ne flow is e	xecuted. Minimizing unnecessary		
xecutions helps to conserve your org's resources.					
create a flow that's trippered when a record is updated, we recomme	and first defining entry conditio	os. Theo se	elect the Only when a record is		
ted to meet the condition requirements option for When to Run th	e Flow for Updated Records.				
tion Requirements					
tion Requirements Conditions Are Met (AND)					
tion Requirements Conditions Are Met (AND)					
tion Requirements Conditions Are Met (AND)	Operator		Value		
Conditions Are Met (AND)	Operator Greater Than	•	Value 1000		
Conditions Are Met (AND)	Operator Greater Than	Ŧ	Value 1000		

- 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**

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

Setup Home Object N	Aanager 🗸								
Q, flows Process Automation	Flows				555 111 - <i>11111</i> - 53 33 5 11		Flow 1	rigger Explorer N	ew Flow
Flows Identity Login Flows	Row Definitions All Flows ▼ 26 items + Sorted by Last Modified By + Filtered by All flow de	finitions + Updated a few seconds a	90		(			\$+	c 🔻
bidn't find what you're looking for?	Flow Label 🗸 🗸	Process Type $\sim$	Active $\lor$ Ten	n v Pack	kage State $\checkmark$	Pack $\lor$	Last Modified 4 $\checkmark$	Last Modified D $ \sim $	
ry using Global Search.	Create Property	Screen Flow		Seco	ondGen-Installed-Editable		Jean-Max Cyprien Jr	8/15/2022, 9:25 AM	¥ ^
	Confirm Booking Request	Screen Flow	¥ ¥	Man	naged-Installed				v
	Outbound New Appointment	Salesforce Scheduler Flow	<ul> <li>Image: Image: Ima</li></ul>	Man	naged-Installed				¥
	Inbound New Guest Appointment	Salesforce Scheduler Flow	<ul> <li>Image: Image: Ima</li></ul>	Man	naged-Installed				
Login Flows Jidn't flow what you're looking for? Ny using Global Search.	Inbound Cancel Appointment	Salesforce Scheduler Flow	v v	Man	naged-installed				v
	Inbound Modify Appointment	Salesforce Scheduler Flow	<ul> <li>Image: Image: Ima</li></ul>	Man	naged-Installed				¥
	Inbound New Appointment	Salesforce Scheduler Flow	<ul> <li>Image: Image: Ima</li></ul>	Man	naged-installed				
	Book Appointment from invitation	Salesforce Scheduler Flow		Man	naged-installed				¥
	Generate Appointment Invitation	Calarforna Crhadular Elnar	a a	Mar	halletintellad				

- 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.



- 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.

	Configure Start	
*Object Course		^
		-1
Configure Trigger		- 1
* Trigger the Flow When:		- 11
A record is created     A record is updated		- 11
<ul> <li>A record is created or updated</li> </ul>		- 11
A record is deleted		
Set Entry Conditions		
Specify entry conditions to reduce the number of re- executions helps to conserve your org's resources.	hat trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow	
If you create a flow that's triggered when a record is meet the condition requirements option for When	ed, we recommend first defining entry conditions. Then select the <b>Only when a record is updated to</b> n the Flow for Updated Records.	
Condition Requirements		
None	▼	
		-
		_

pn

# 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'

😴 Flow Builder		? •
Select Elements 5 C 🕸	Auto-Layout 💌 Run D	Debug View Tests Activate Save As Save
x X	x x x x x x x x x x x x x x	

#### 5

- 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'

ow Builder F	low Builder Project - V1				×
\$			Edit Get Records		
	Ge	t kecords of This Object			1
anager	•0	bject istructor			
2)	Filt	er Instructor Records			- 8
	Con	dition Requirements			- 18
		II Conditions Are Met (AND) 👻			- 18
ient		Field	Operator	Value	
		Name	Equals 💌	A <sub>a</sub> \$Record > Instructor Names X	• -
un Cost		Field	Operator	Value	
on Sort	AN	D Availability_c	Equals 💌	Available	G Assi
on Filter		+ Add Condition			
lecords					
Records	30	t Instructor Records			
ords	Sort	Order			
lecords				Cancel	Done
				Available assignment	

#### 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'

← 😴 Flow Builder	Flow Builder Project - V1				×
508		Edit Decision	1		
Toolbox	Available (Available) 💉				
Elements Manager	Outcomes For each path the fi	ow can take, create an outcome. For each outcome, specify the conditions that must b	e met for the flow to t	ake that path.	
<ul> <li>Interaction (2)</li> </ul>	OUTCOME ORDER 0 +	OUTCOME DETAILS			
4 Action	Available Y	Label	Outcome API	Name	
Subflow		Available Y	Available_Y		
V Logic (5)	Not Available	Condition Requirements to Execute Outcome			
Assignment		All Conditions Are Met (AND)			
Decision		Paraura Operator		When	
C Loop		Image: InstructorAvailability > Availability X		Enter value or search resources	Q m
Collection Sort					
Collection Filter		+ Add Condition			
V Data (4)		When to Execute Outcome			
Create Records		If the condition requirements are met			
Update Records		<ul> <li>Only if the record that triggered the flow to run is updated to meet the</li> </ul>	condition requirement	its	
Get Records					~
Delete Records					Cancel Done
			Avai	lable assignment	

# CREATING A FLOW CONT.

- 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'



#### 8

- 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'

Find Salesforce records and store their field values in flow variables. Assigned to Dean (Assigned_to_Dean)  Get Records of This Object  *Object Group Filter Group Records Condition Requirements All Condition Requirements Field Operator Value Field Operator Field Field Operator Field Field Operator Field Fie		Edit Get Reco	ords	
Assigned to Dean (Assigned_to_Dean)	Find Salesforce records and store their	r field values in flow variables.		î.
Get Records of This Object   •Object   Group   Filter Group Records   Condition Requirements   All Conditions Are Met (AND)   Field   Operator   Value   Field   Operator   Value   Field   Operator   Value   AND   Type   Equals   Queue	Assigned to Dean (Assigned_t	o_Dean) 🖌		
*Object Group Filter Group Records Condition Requirements All Conditions Are Met (AND) * Field Operator Value Field Operator Value Field Operator Value and Type Equals & Queue @	Get Records of This Object			
Group       Filter Group Records       Condition Requirements       All Conditions Are Met (AND)       Field       Operator       Value       Field       Operator       Value       Field       Operator       Value       AND       Type       Equals       + Add Condition	* Object			
Filter Group Records Condition Requirements All Conditions Are Met (AND) Field DeveloperName Equals Field Operator Value Field Operator Value Field Value Field Value Field Operator Value Field Operator Value Course Opera	Group			
Condition Requirements All Conditions Are Met (AND) Field Field AND Type Equals All Condition Field Coperator Field Coperator Course	Filter Group Percerde			
All Conditions Are Met (AND)  Field  DeveloperName  Equals  All  Operator  Value  Field  Operator  Value  AND  Type  Equals  Queue	Condition Paguirements			0
Field     Operator     Value       DeveloperName     Equals     Aa NewCase > Group ID X     Imit       Field     Operator     Value       AND     Type     Equals     Queue       + Add Condition	All Conditions Are Met (AND)	•		
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DeveloperName     Equals     A NewCase > Group ID X       Field     Operator     Value       AND     Type     Equals     Queue       + Add Condition     •	Field	Operator	Value	Assig
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AND Type Equals v Queue a		Operator	Value	
+ Add Condition	Field		- 0	亩
	Field AND Type	Equals	♥ Queue	
Cancel Done	Field Type AND Add Condition	Equals	♥ Queue	

### 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'

Flow Builder Flow Builder Project	V1						? •
5 0 0 0		Free-Form 💌	Version 1: Inactive—Last modified 2 days ago	Run Debug		Save As	Save
olbox		+					
ments Manager	_	a		^			
Interaction (2)		Edit Assig	nment				
4 Action							
Subflow	Assign to Dean (Assign_to_Dea	an) 🖉					
Logic (5)	Set Variable Values						
Assignment	Each variable is modified by the operator	and value combination.					
Decision	Variable	Operator	Value				
C Loop	Aa SRecord > Owner ID X	Equals	<ul> <li>Ag Group from Assigned_to_Dean &gt;</li> </ul>	Grou. X B			
Collection Sort							
Collection Filter	+ Add Assignment				1		
Data (4)				Done			
Create Records							
D Update Records		Get Records			7		
Get Records		Available assignment		3			
Delete Records				Get R	cords		
				Available a	ssignment		
Get more on the AppExchange							

# CREATING A FLOW CONT.

- 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'

		Edit Get Recor	rds				View Tests	Activate	Save As	Sav
Cot	Percente of This Object					•				
Getr	Records of This Object									
• Obje	et .									
inst	ructor					. 1				
Filter	Instructor Records									
Condit	tion Requirements					- 1				
All	Conditions Are Met (AND)					- 1				
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### 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.

