



altaFlow for Salesforce

This guide will take you through the process of installing, configuring and using the altaFlow application for your Salesforce organization.

Updated on

Jan 15, 2026



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 **Note:** Some screenshots in this guide are from an older version of the app. The functionality has not changed, and updated content is on the way.

Installation and configuration

Below are step-by-step instructions for installing and configuring altaFlow for your Salesforce organization. Note that altaFlow is fully functional in both the Salesforce Classic and Salesforce Lightning environments.

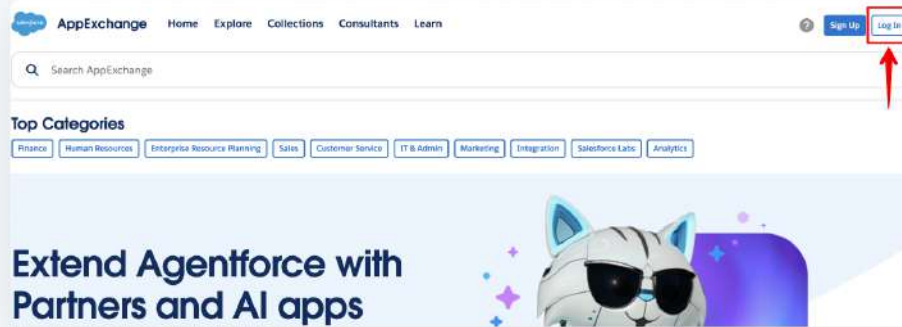
Requirements:

- a Salesforce organization with admin privileges (required for package installation)
- an altaFlow account
- user permissions that are required:
 - for installing the app and administering an integration: **Modify All Data, Manage Users, API Enabled, Apex REST Services**
 - for using altaFlow custom buttons: **Apex REST Services**
 - for using the altaFlow app: **Apex REST Services, API Enabled**
- the **Enhanced Email** option must be activated (Setup → Enhanced Email)
- the **Session Security Level Required at Login** setting must be set to **None** to create custom buttons (administrator user's profiles)

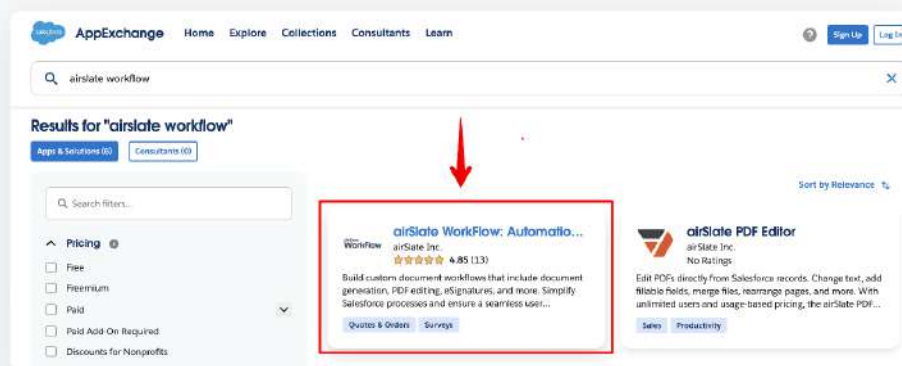
Installation

Add altaFlow to your Salesforce organization by following the steps below.

1. Go to the AppExchange using this link <http://appexchange.salesforce.com/> and login with your Salesforce credentials.



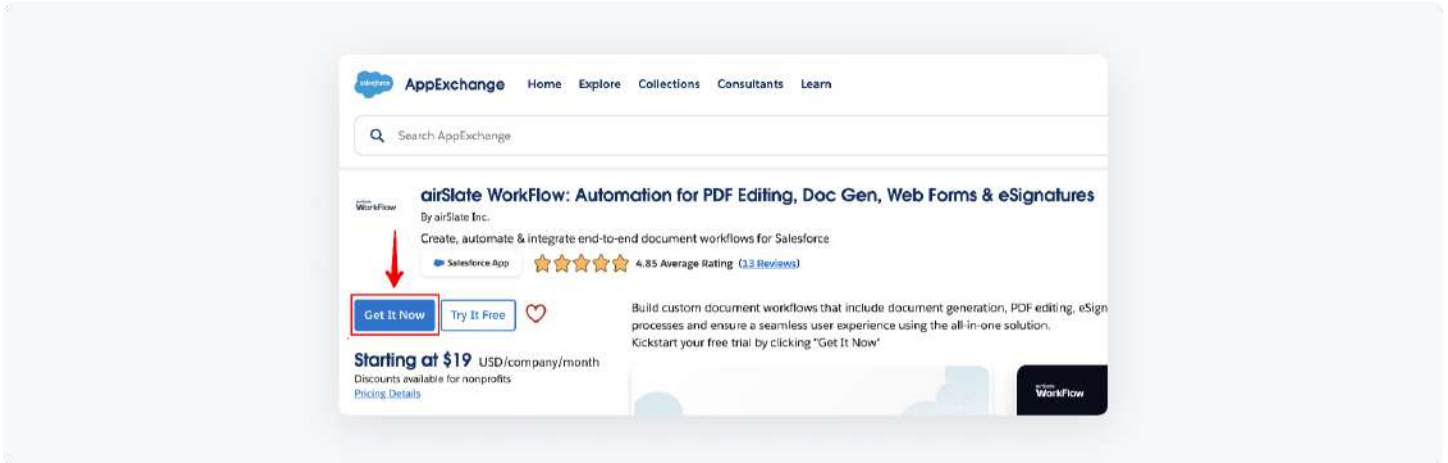
2. In the search field, type in *altaflow* and hit **Enter** on your keyboard. Then, select the altaFlow app from the list.



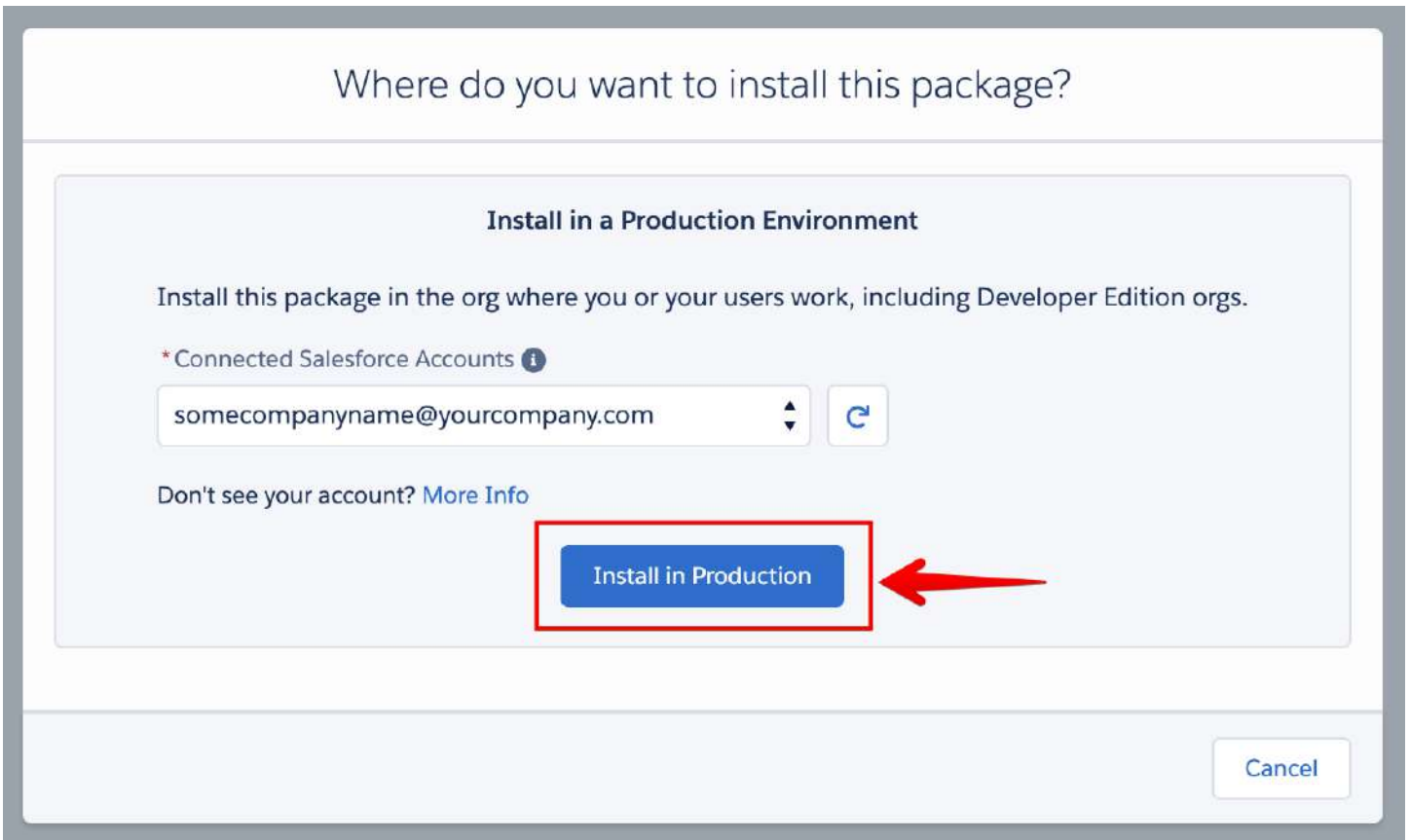
3. You can install the app in different environments.

- To install in **Production** environment:

Select **Get It Now**.



In the installation modal window, select **Install in Production**.



Check your installation details. Select the **I have read and agree to the terms and conditions** checkbox, then click **Confirm and Install**.



Confirm Installation Details

Free	Some company name
Duration	Number of Subscribers
Does Not Expire	Site-wide
Username somecompanyname@yourcompany.com	

Here are the details we'll share from your profile [Edit Profile](#)

* First Name	Some name	* Company	Some company name
* Last Name	Some last name	* Country	United States
Job Title	CEO	* State/Province	New York
* Email	sfacc1615@gmail.com		
Phone			

1 ☒ I have read and agree to the [terms and conditions](#).

Salesforce.com Inc. is not the provider of this application but has conducted a limited security review. [Learn More about the AppExchange Security Review.](#)

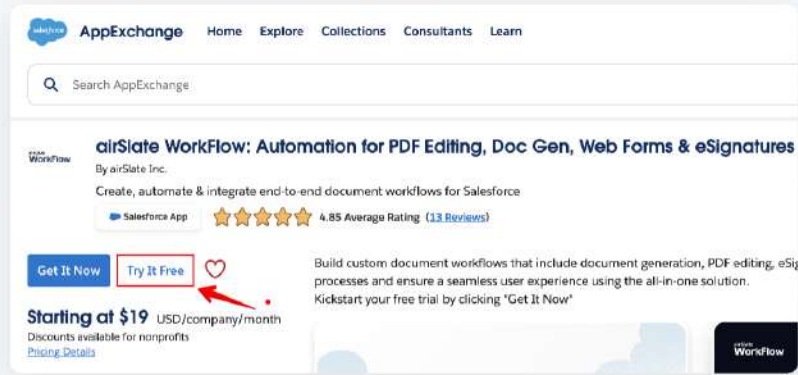
☐ Allow the provider to contact me by email, phone, or SMS about other products or services I might like

2

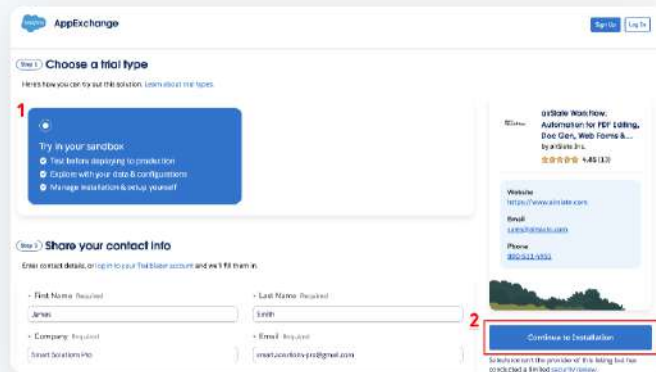
CancelConfirm and Install

- To install the app in the **Sandbox** environment:

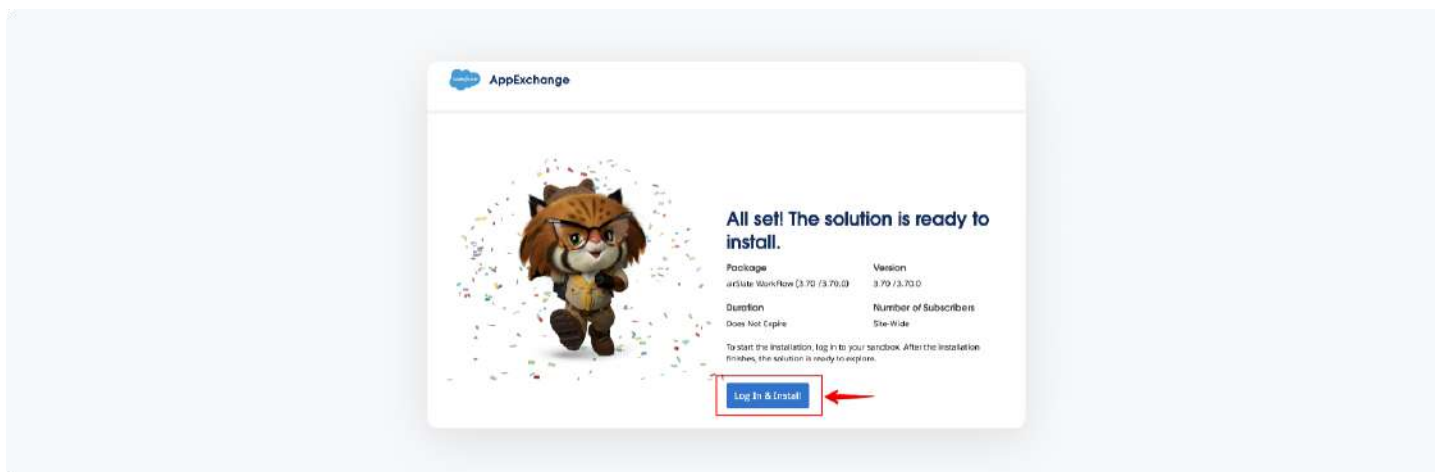
Select **Try It Free**.



Select **Try in your sandbox**. Then, select **Continue to Installation**.



Select **Log in and Install** to finish the installation in the Sandbox environment.



4. On the next page, select **Install for All Users**, then click **Install**.



5. Tick the **Yes, grant access to these third-party websites** checkbox and click **Continue**.

Approve Third-Party Access

This package may send or receive data from third-party websites. Make sure you trust these websites. [What if you are unsure?](#)

Website	SSL Encrypted
api.airslate-au.com	☒
api.airslate-rc.xyz	☒
api.airslate.com	☒

1 ☒
Yes, grant access to these third-party web sites

2

Continue

Cancel

The installation process may take several minutes. You will be notified via email when the installation is complete.

6. Click **Done** to proceed to your organization and configure the application.

Install airSlate WorkFlow

By airSlate

This app is taking a long time to install.
You will receive an email after the installation has completed.

→

Done

App Name	Publisher	Version Name	Version Number

You've successfully installed altaFlow for your Salesforce organization and can proceed to configuration.

Tip: Try refreshing the page if altaFlow hasn't appeared in the **Installed Packages** section.

SETUP

Installed Packages

Installed Packages

Help for this Page

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Visit AppExchange >

Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date
Uninstall Configure Manage Licenses	PDFFilter Enterprise	PDFFilter	4.0	pdffilter_sf	Expired	Unlimited	5	☐	11/6/2020	10/7/2020 7:59 AM
Description: PDFFilter Enterprise for Salesforce allows you to type, edit, erase, blackout, annotate text and sign documents including Word and PDF that you keep in...										
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	Free	N/A	N/A	N/A	N/A	6/3/2019 3:36 AM
Description: This package contains Connected Applications for all the officially supported Salesforce client applications such as Touch, Salesforce for Outlook, Sa...										
Uninstall Configure Manage Licenses	airState Workflow	airState	3.56	pdffilter_sfree	Active	Unlimited	0	☐	Does not Expire	1/16/2024 7:56 AM
Description: airState Workflow for Salesforce										

Configuration

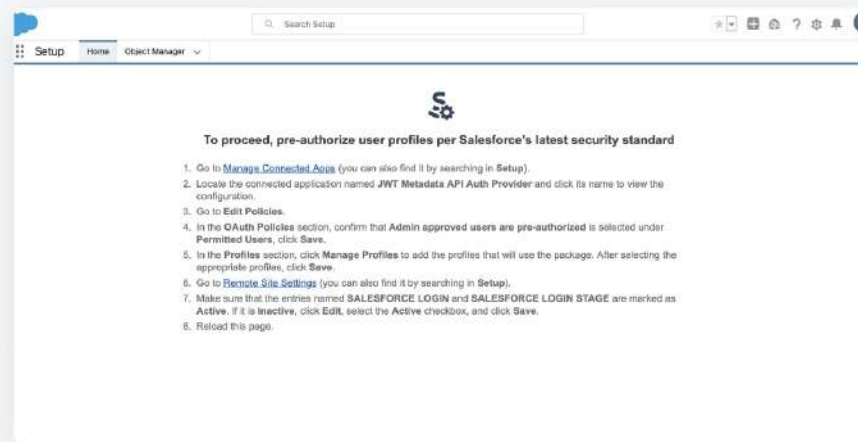
Easily authorize an administrator account in altaFlow, add teammates to your altaFlow workspaces and configure altaFlow with your Salesforce organization.

Setup Wizard

👉 **Tip:** In case of any questions, select the **Contact Sales** button and the Sales team will help you out. If you have a paid subscription, you will see the **Contact Support** button instead.

Easily authorize your altaFlow account or create a new one. Connect a workspace to your Salesforce organization and add teammates and coworkers using the **Setup Wizard**.

The Setup Wizard will be available right after the altaFlow package has been installed. You'll be able to adjust your settings in the **Admin Tools** tabs after. All the instructions are already provided on the screen.



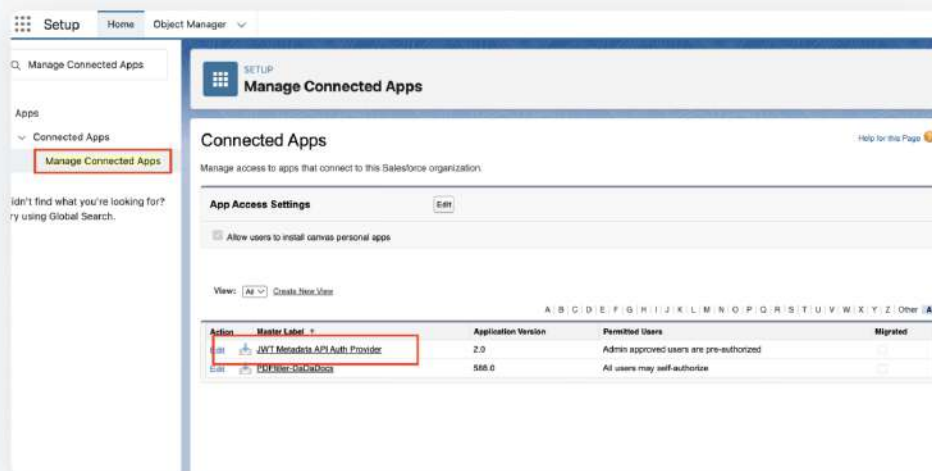
Note: If altaFlow Admin Tools aren't available after package installation (due to lack of permissions), check back later when permission sets will be assigned.

To assign altaFlow permission set manually, refer to the **Failed to access Admin Tools** section of

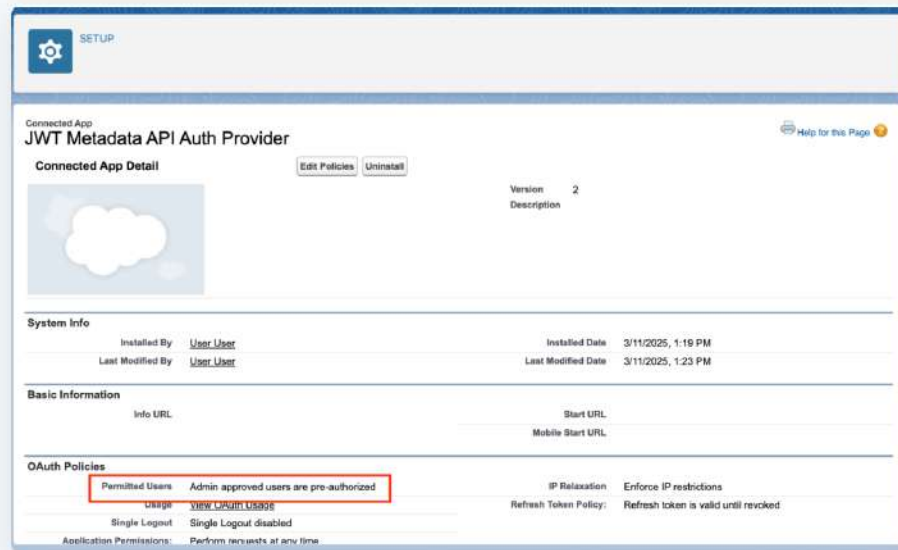
this user guide.

1. Pre-authorize user profiles that will use the package by adding the necessary profiles to a connected application included in the package.

- Navigate to **Setup** and search for **Manage Connected Apps**.
- Find the connected application named **JWT Metadata API Auth Provider** in the list and click its name to view the details.



- In the **OAuth Policies** section, confirm that **Admin approved users are pre-authorized** is selected under **Permitted Users**. If it isn't selected, click **Edit Policies**, set it to **Admin approved users are pre-authorized**, and then click the **Save** button.



SETUP

Connected App
JWT Metadata API Auth Provider

Connected App Detail [Edit Policies](#) [Uninstall](#)

Version: 2
Description:

System Info

Installed By: User User	Installed Date: 3/11/2025, 1:19 PM
Last Modified By: User User	Last Modified Date: 3/11/2025, 1:23 PM

Basic Information

Info URL:	Start URL:
	Mobile Start URL:

OAuth Policies

Permitted Users: Admin approved users are pre-authorized	IP Relaxation: Enforce IP restrictions
Usage: VIEW OAuth USAGE	Refresh Token Policy: Refresh token is valid until revoked
Single Logout: Single Logout disabled	
Application Permissions: Perform requests at any time	

- Add profiles that will use the package by clicking the **Manage Profiles** button in the **Profiles** section. After selecting the appropriate profiles, click **Save**.



Note: If login IP restrictions are used for users, the admin must add the Salesforce organization's IP address to the whitelist.

If Salesforce is running on Hyperforce infrastructure, the entire range of IP addresses for the used instance must be added due to the dynamic nature of cloud environments.

Custom Connected App: Name

Apex Plugin Class

Run As

User Provisioning Settings

☐ Enable User Provisioning

Trusted IP Range for OAuth Web Server Flow

No application-defined IP ranges

Profiles [Manage Profiles](#)

Profile	Profile Description
System Administrator	

Permission Sets [Manage Permission Sets](#)

No permission sets associated with this app.

Custom Attributes [New](#)

No Custom Attributes

Custom Settings



Note: Admin Pre-authorization allows administrators to pre-approve user access to a connected application. This enhances security by strictly controlling access, ensuring only authorized users have the necessary permissions to obtain a Session ID.

2. In the **Installed packages** section, click **Configure** next to your installed altaFlow package.

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your Salesforce environment. [Learn More about Installing Packages.](#)

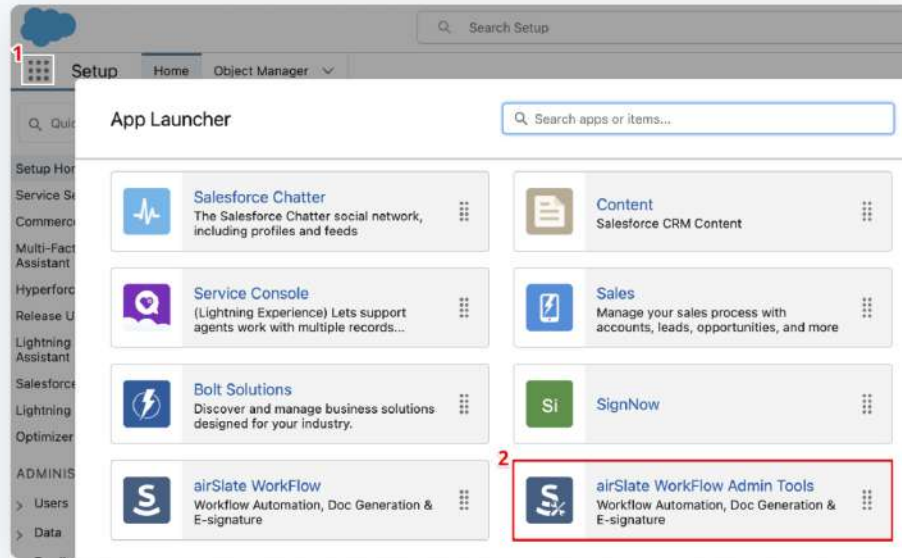
Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying the components individually using the other features in Setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date	Install Date
Uninstall Configure Manage Licenses	PDFfiller Enterprise	PDFfiller	4.0	pdfiller_sf	Expired	Unlimited	5	☐	11/6/2020	10/7/2020 7:59 AM
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	Free	N/A	N/A	N/A	N/A	6/3/2019 3:36 AM
Uninstall Configure Manage Licenses	airSlate WorkFlow	airSlate	3.56	pdfiller_shoo	Active	Unlimited	0	☐	Does not Expire	1/16/2024 7:56 AM

Alternatively, go to the **App Launcher** and select **altaFlow Admin Tools** in the list.

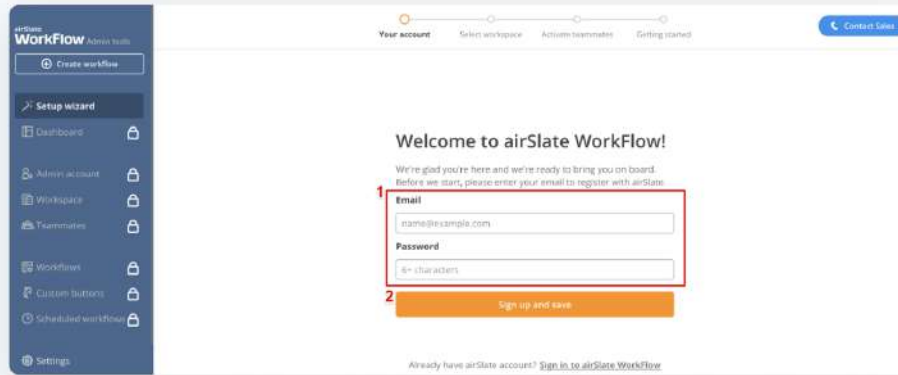


The setup wizard will automatically open. If you have any questions, select **Contact Sales** and the Sales team will help you out.

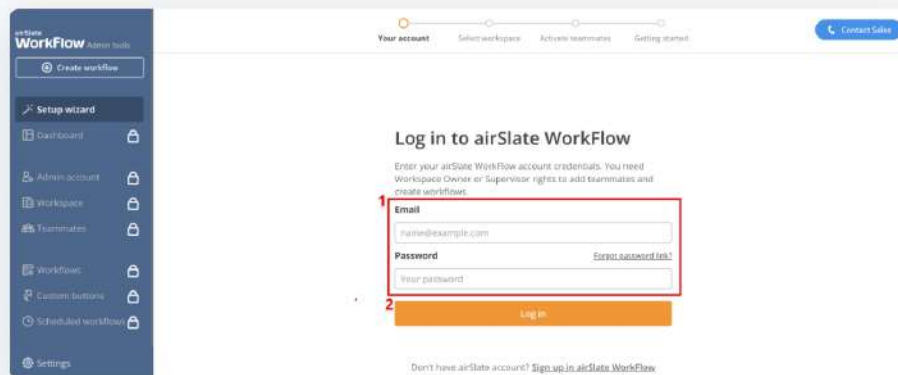


Note: After selecting your workspace, the **Contact Sales** button will change to **Contact Support** if you have a paid subscription.

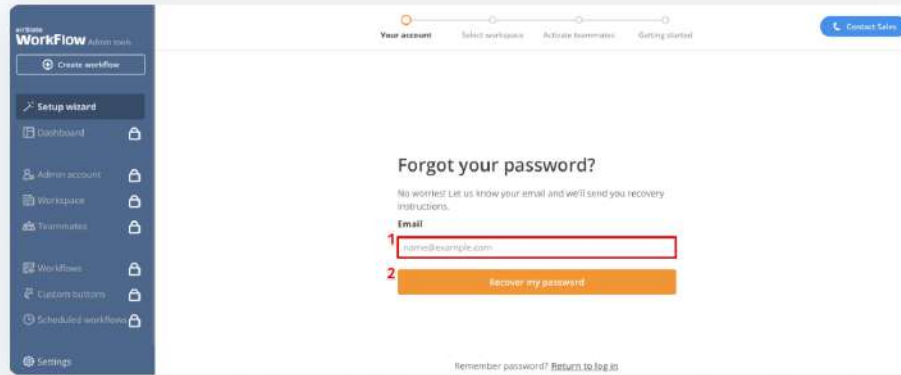
3. In the **Your account** tab, register an altaFlow account if you don't already have one. Your Salesforce credentials will be automatically entered. Register with your existing credentials or enter new credentials. Next, select **Sign up and save**.



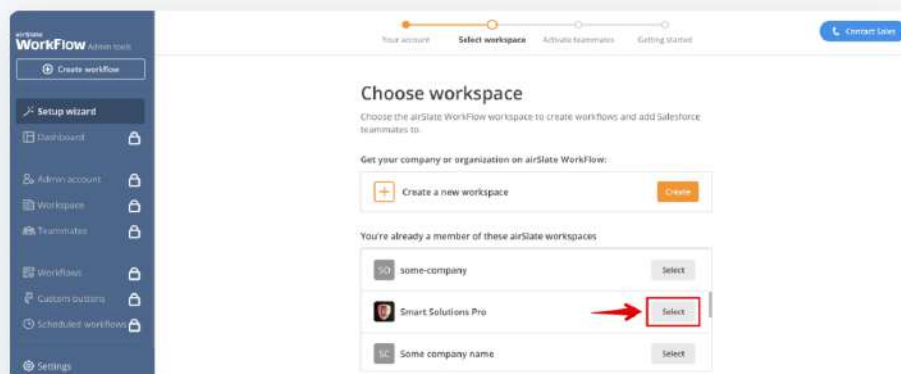
If you already have an altaFlow account, select **Sign in to altaFlow**. Add your altaFlow administrator account credentials and click **Log in**.



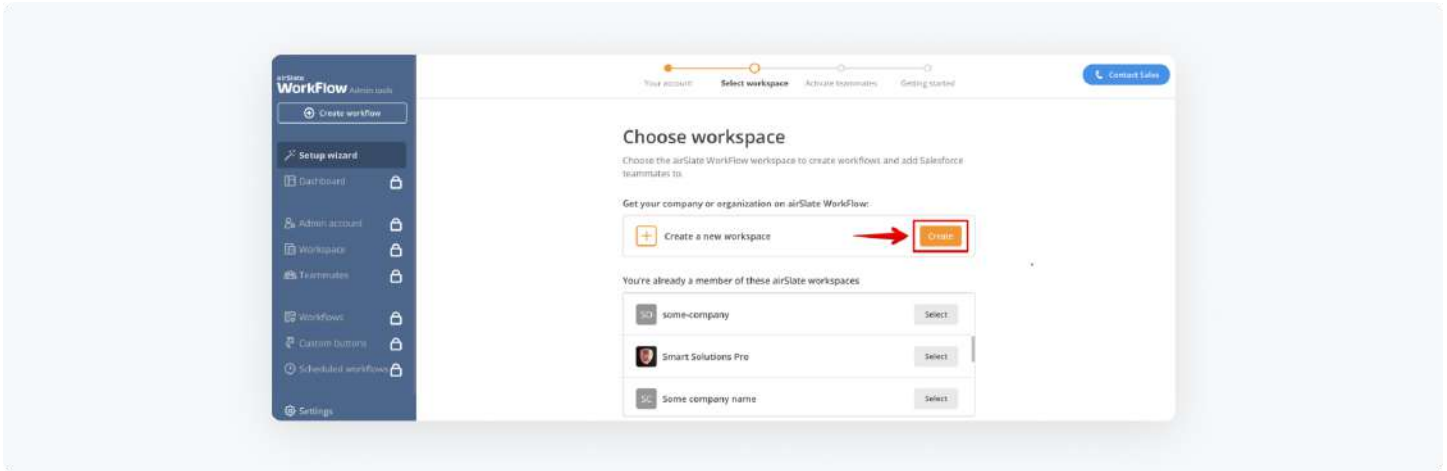
If you've forgotten your password, click **Forgot password** to recover it. Enter the email you'd like to receive password recovery instructions to. Then, click **Recover my password**.



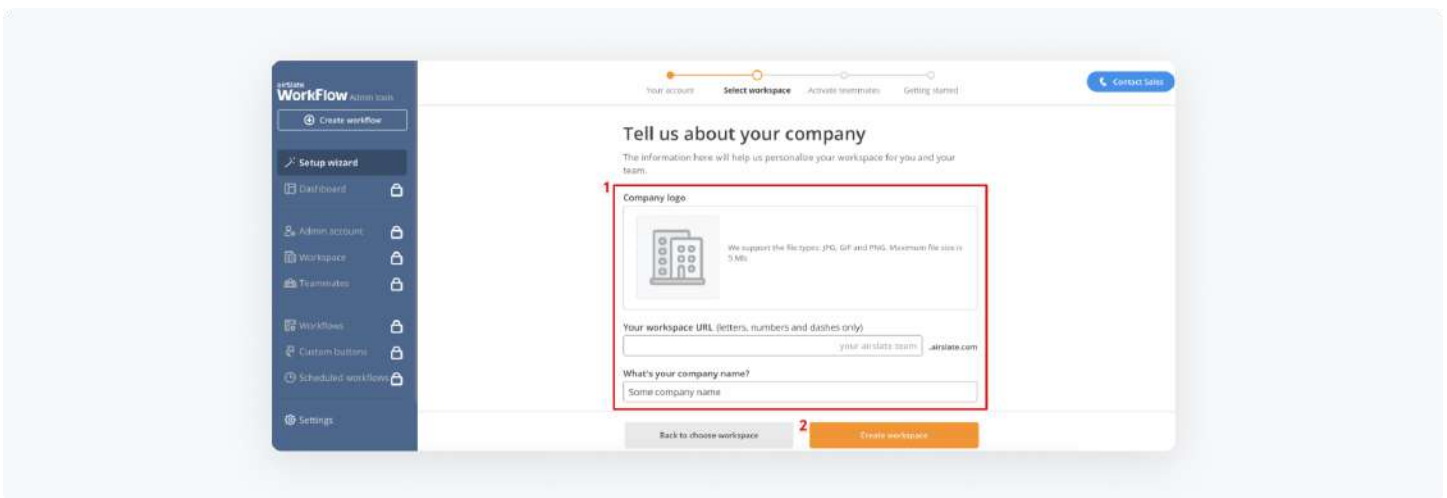
4. Once you've successfully logged in to altaFlow, you will be redirected to the **Select workspace** tab. Click select next to the altaFlow workspace you'd like to add Salesforce teammates to.



To create a new workspace, click **Create**.



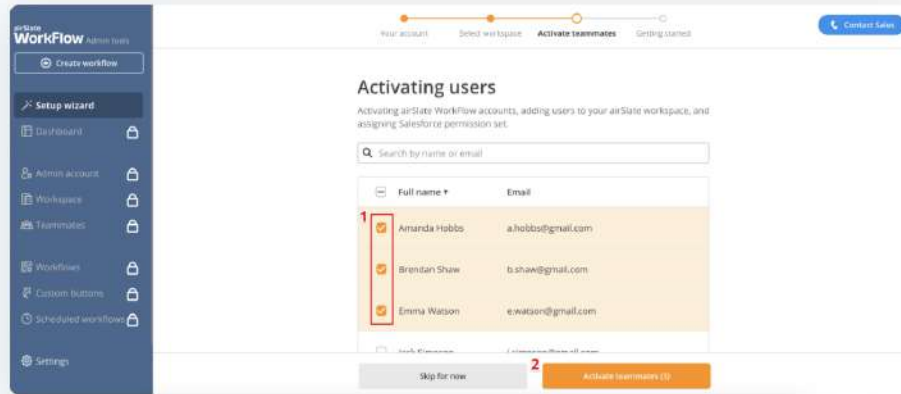
On the next page, enter your company's information. When finished, click **Create workspace**.



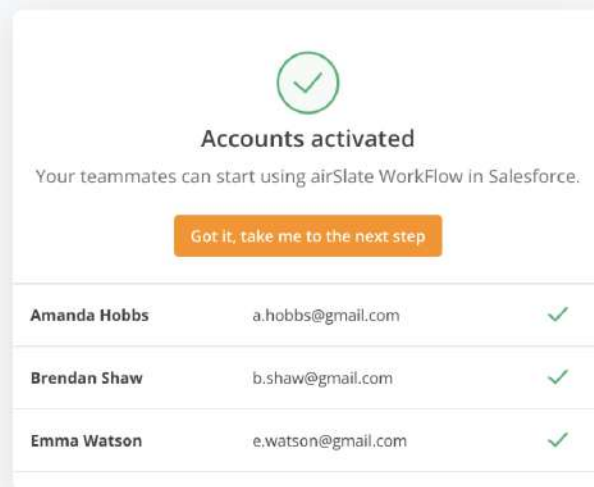
5. In the **Activate teammates** tab, choose the users you'd like to invite to your altaFlow workspace.

Select the checkboxes next to the users you'd like to invite and click **Activate teammates**. Use the quick find to search for teammates.

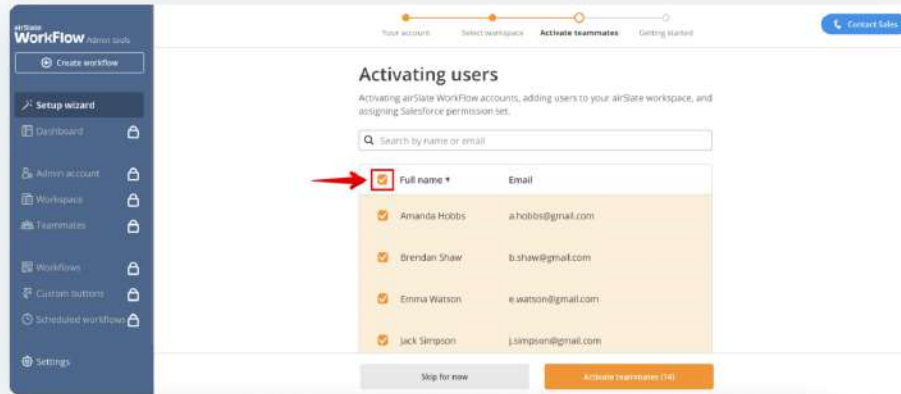
To invite teammates later, select **Skip for now**.



Once activated successfully, the pop-up with all activated accounts will open. Click **Got it, take me to the next step** to proceed.

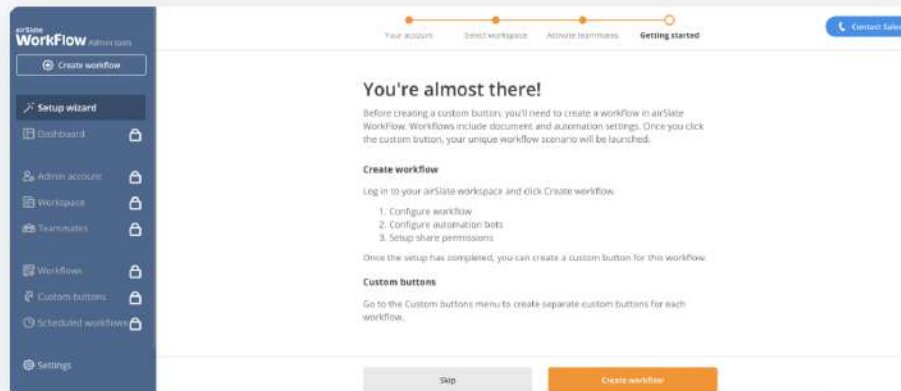


To select all users in the list, select the checkbox next to **Full name**.



6. Once users have been added successfully, the **Getting started** tab will open. Create a new workflow at this step by selecting **Create workflow** or create a new workflow later after you finish setting up the wizard.

If you already have workflows you'd like to create custom buttons for, click **Skip**. The **Custom buttons** tab will automatically open for creating custom buttons.

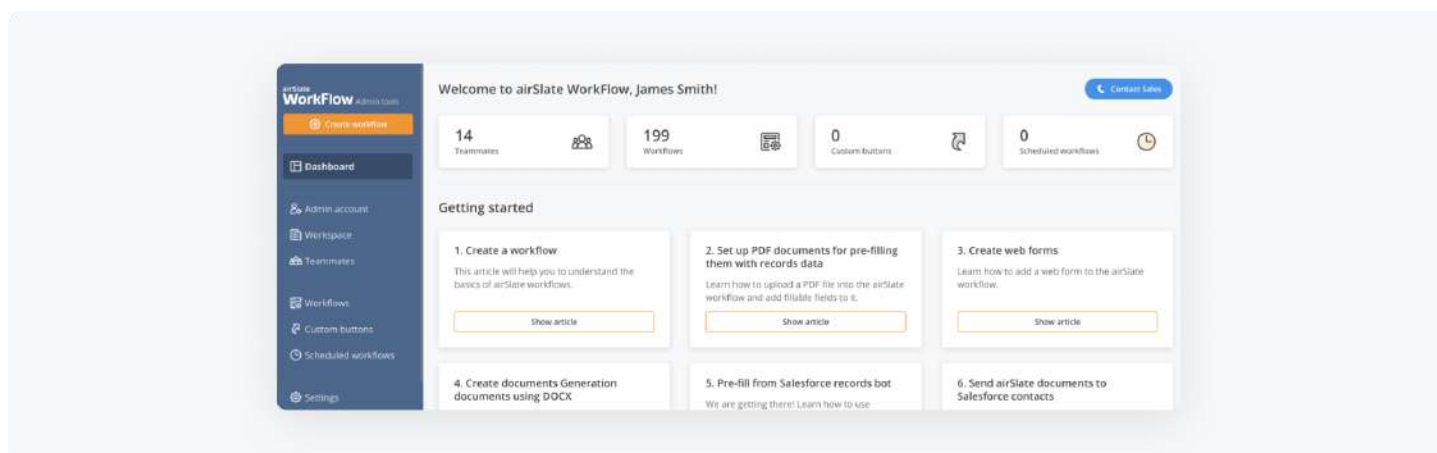


Dashboard

The **Dashboard** tab displays the number of **Teammates**, **Workflows**, **Custom buttons** and **Scheduled workflows** in your workspace. Clicking one of these options redirects you to the corresponding tab for adjusting settings.

You can also find helpful how-to articles on configuring and using altaFlow workflows inside Salesforce. To read an instructional article, select **Show article** under the feature you want to learn more about.

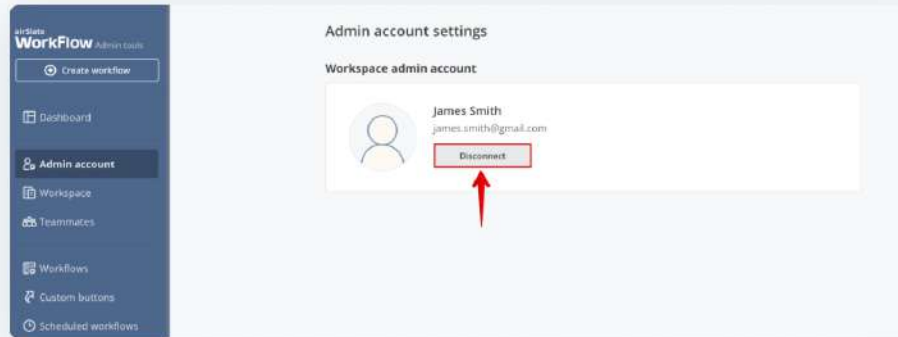
Tip: In case of any questions, select the **Contact Sales** button and the Sales team will help you out. If you have a paid subscription, you will see the **Contact Support** button instead.



Account

View the settings for your admin account in the **Account settings** page.

To change the altaFlow administrator account, select **Disconnect**. Once disconnected you'll be able to connect the necessary administrator account.



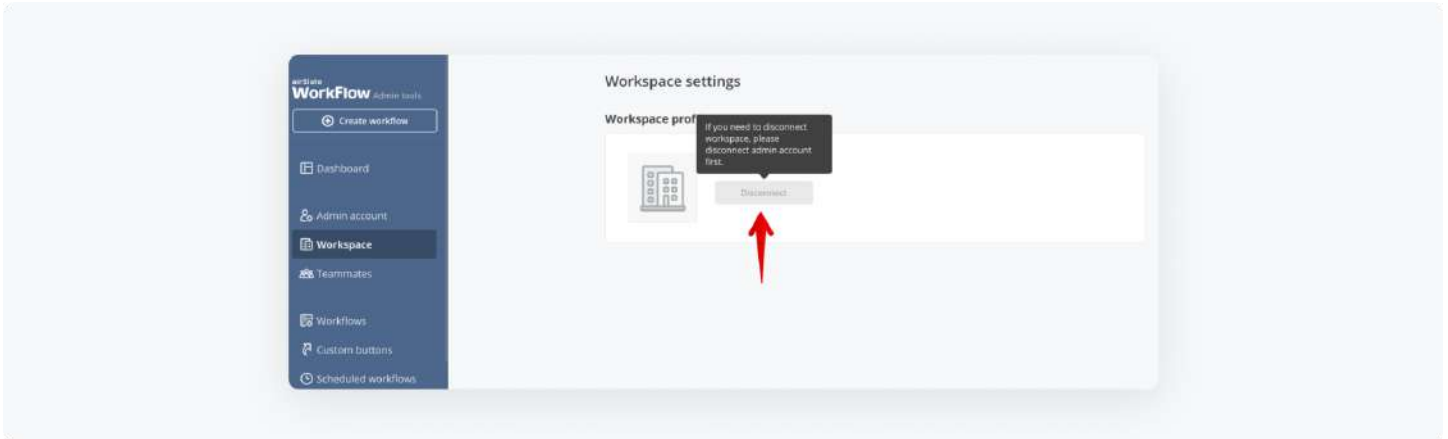
Workspace

View the settings for your Workspace in the **Workspace** tab.

To change your altaFlow workspace, select **Disconnect**. Then select the needed.



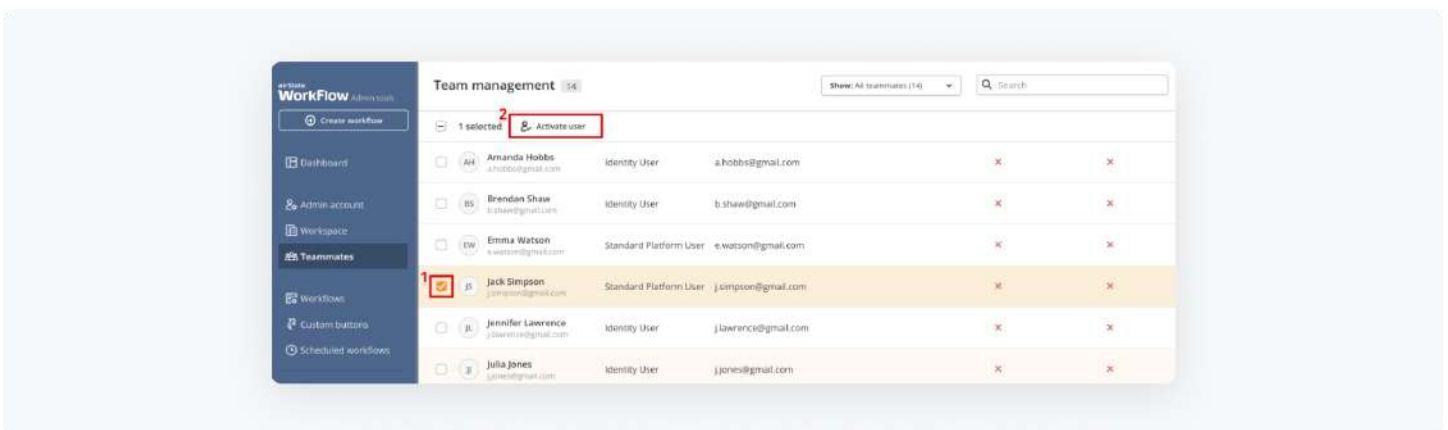
Note: Salesforce administrators without admin access to a connected workspace will have to disconnect an administrator account prior to disconnecting an altaFlow workspace. Otherwise, the **Disconnect** button will be inactive.



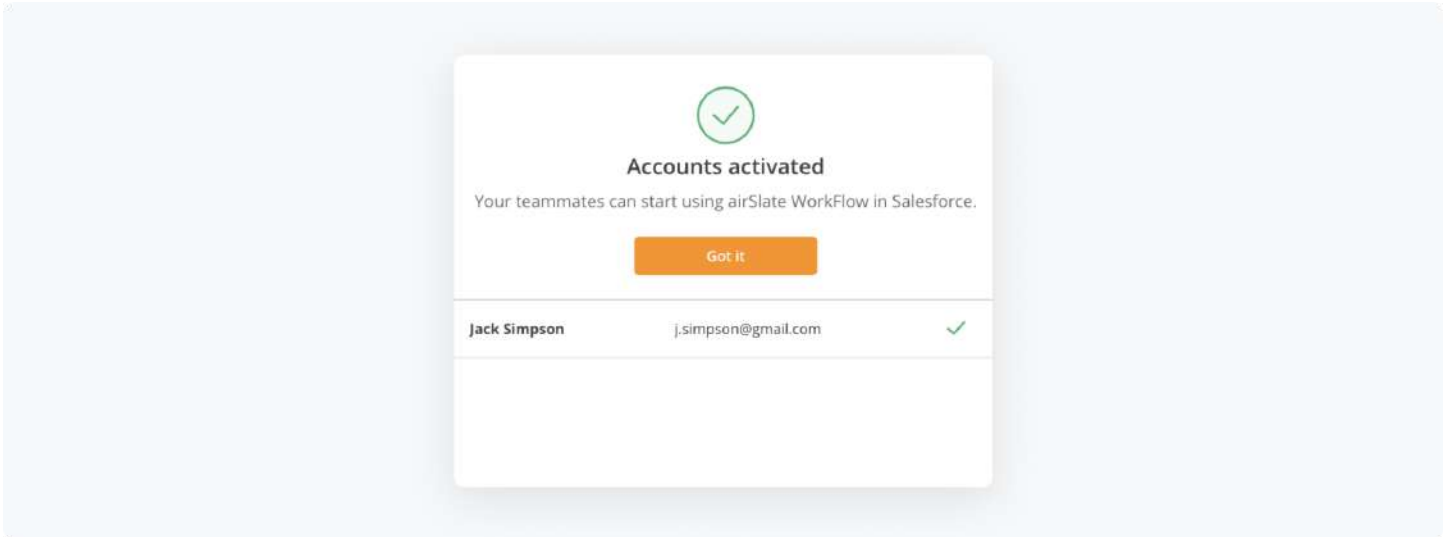
Teammates

Invite new users to your altaFlow workspace & give them instant access to an altaFlow package. Allow them to use altaFlow inside Salesforce without having to register or log in to altaFlow. To do so, click the three dots next to the user you intend to add and select **Activate user**. Use the quick find to search for teammates.

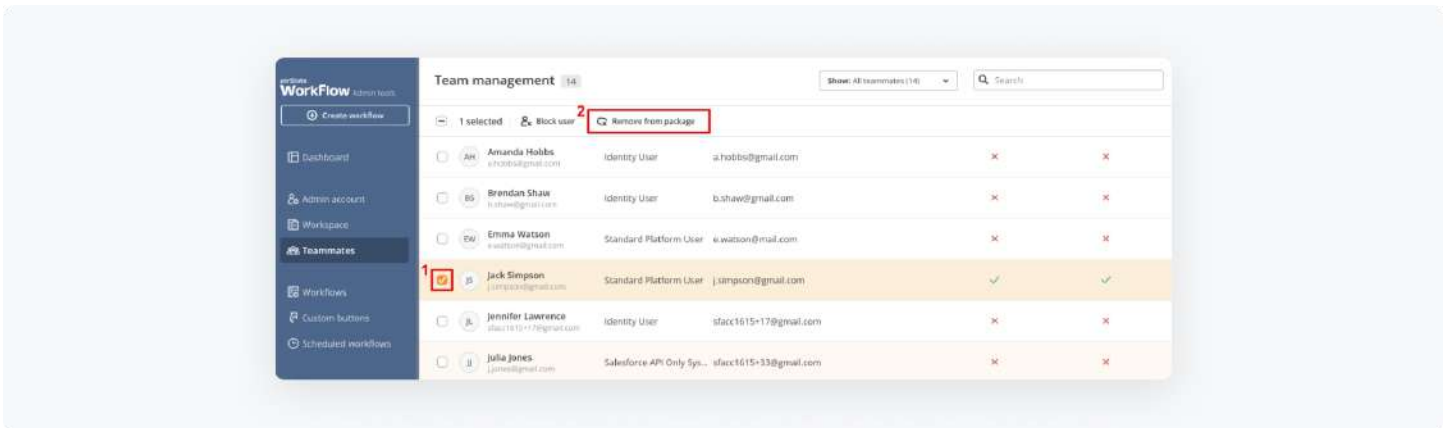
👉 **Tip:** Hover over ✖ and ✔ next to each user to find detailed information about their workspace and package statuses.



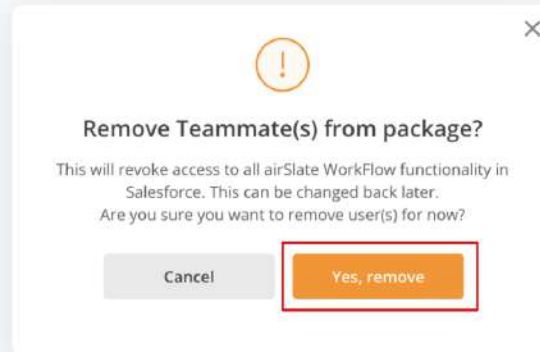
Once activated, you'll see the confirmation modal window. Click **Got it** to continue.



To revoke an active user's access to altaFlow functionality in Salesforce, select the user you need and click **Remove from package**.



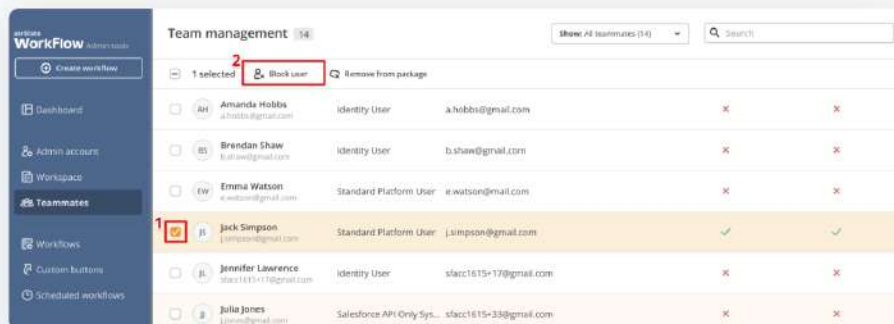
In the confirmation pop-up, select **Yes, remove**.



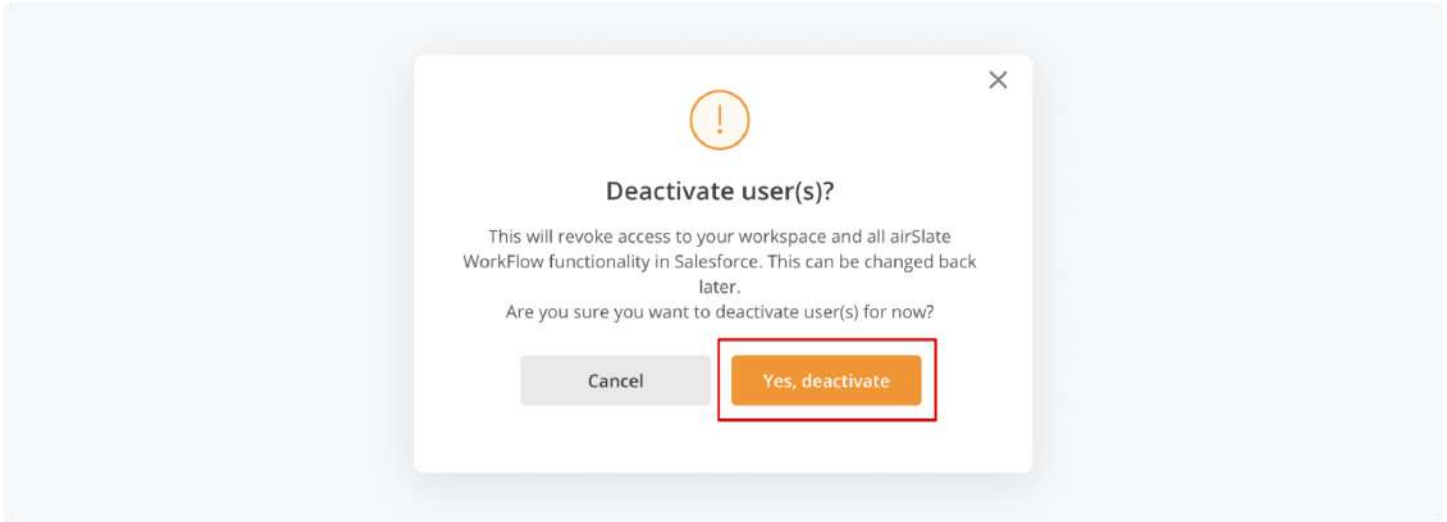
You can also revoke an active user's access to your workspace and all altaFlow functionality in Salesforce. To do so, select the user you need and click **Block user**.



Note: Blocking teammates under the Workspace Owner role is not possible.

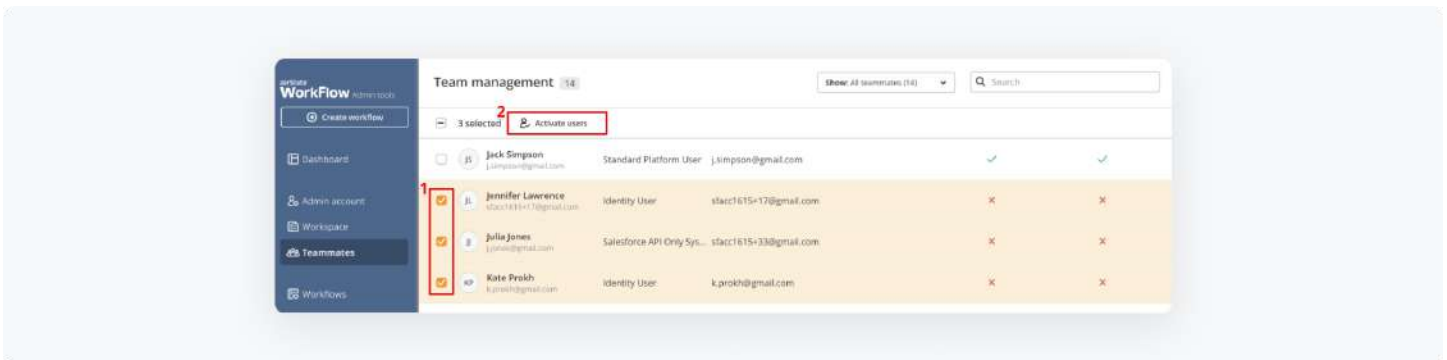


In the confirmation pop-up, select **Yes, deactivate**.

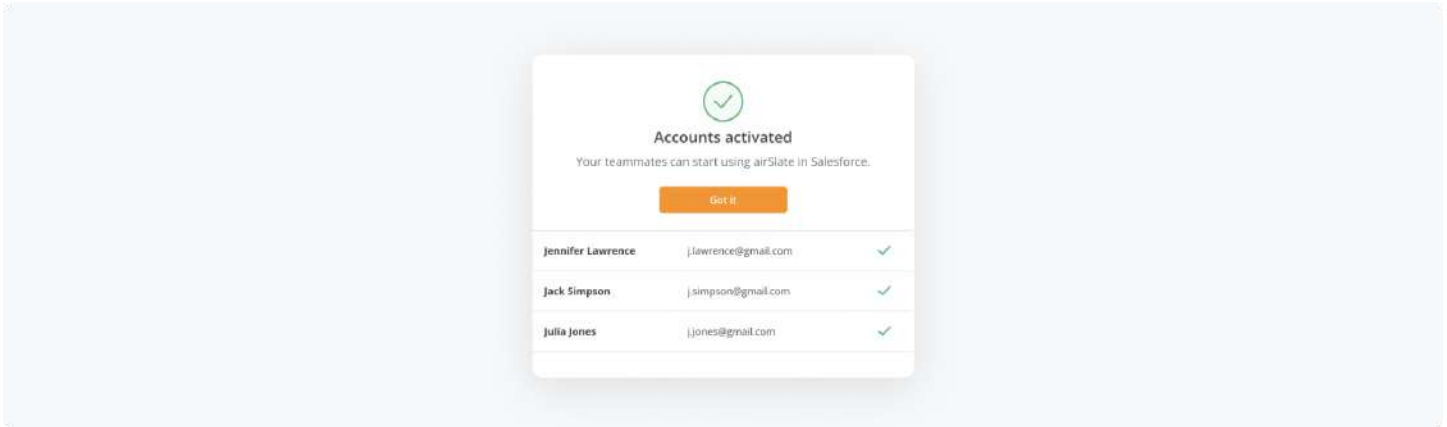


To invite multiple teammates to altaFlow workspaces and grant them access to an altaFlow package at once, select the checkboxes next to the teammates you'd like to invite.

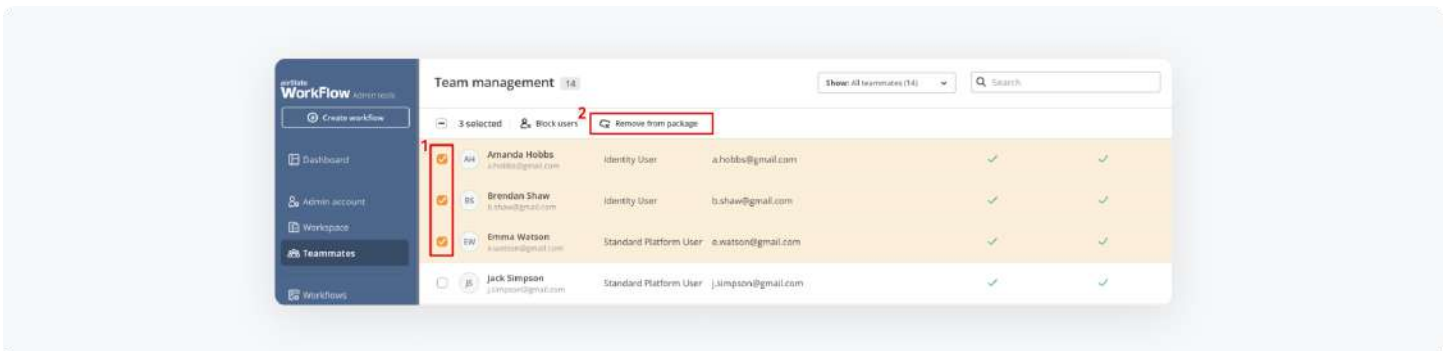
Then, select **Activate users**.



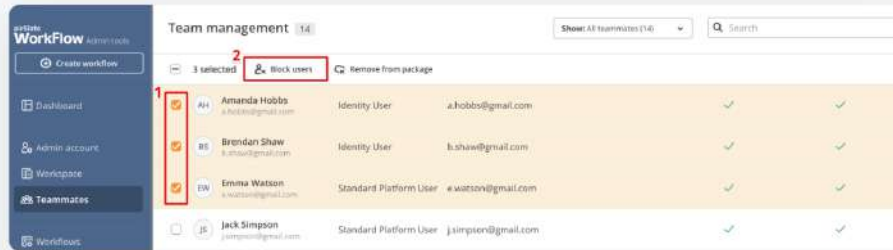
Once activated successfully, the modal window with all activated accounts will open. Click **Got It** to proceed.



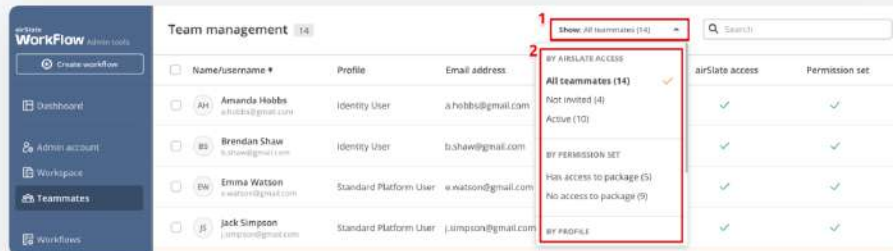
To revoke access to altaFlow functionality in Salesforce from multiple active users, select the users. Then, select **Remove from package**.



You can also revoke access to your workspace & all altaFlow functionality from multiple active users. To do so, select the users you need, then click **Block users**.



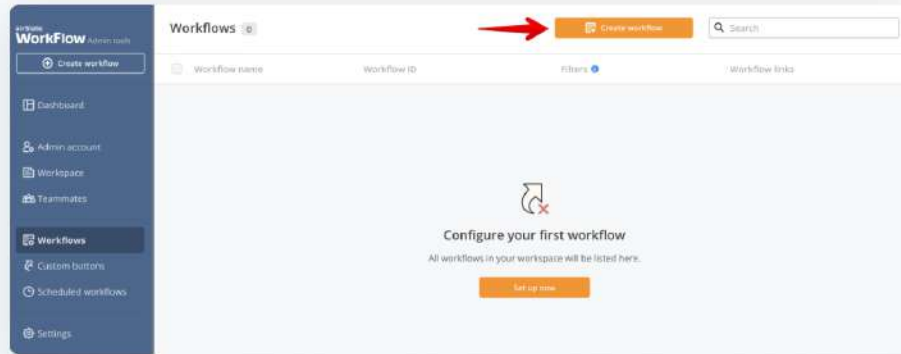
Filter your teammates by their workspace status, package status, or profile by clicking the **Show all teammates** dropdown at the top.



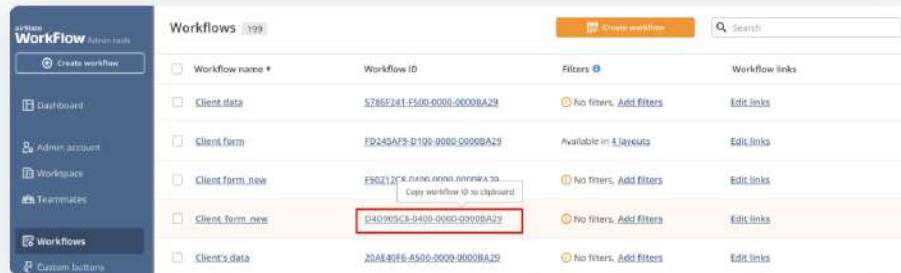
Workflows

Instantly view a list of existing altaFlow workflows in a connected workspace or create a new workflow in seconds. Get workflow ID in a click and use them for setting up processes in the Salesforce Process Builder.

To create a new workflow, select **Create workflow**. If you haven't created any workflows yet, click **Set up now** at the bottom to set up your first workflow.



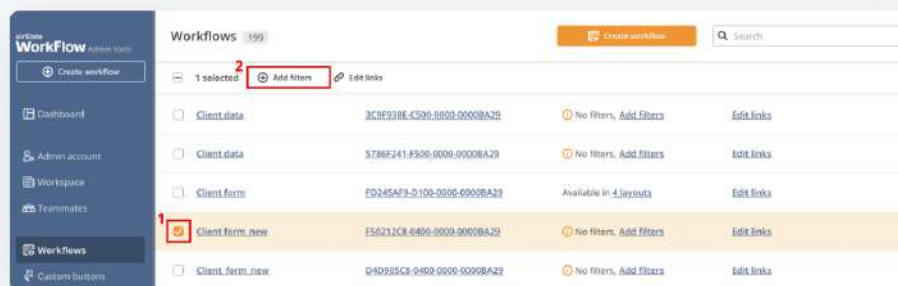
Click on the workflow ID to copy it to the clipboard (required for setting up the Salesforce Process Builder).



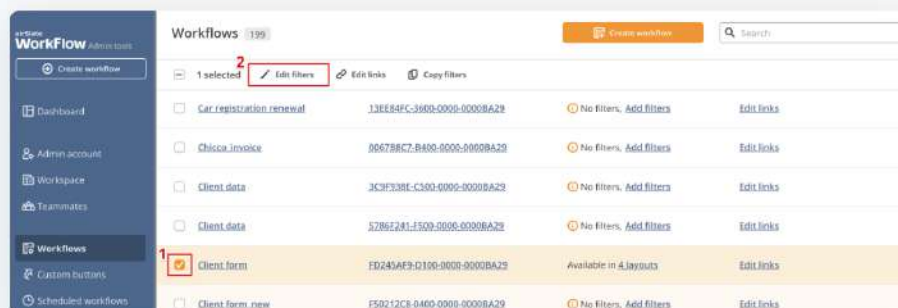
Use the quick find to search for your workspace workflows. Clicking on the workflow name will open it in the altaFlow application.

Add filters for your workflows by assigning them specific layouts and conditions. When in the altaFlow app, users will only be able to see workflows for the records with layouts you've selected or workflows matching the conditions you've specified.

To do so, select the checkbox next to the workflow you intend to add filters to and select **Add filters**.



To edit any existing filters, select the checkbox next to the workflows you need. Then, select **Edit filters**.

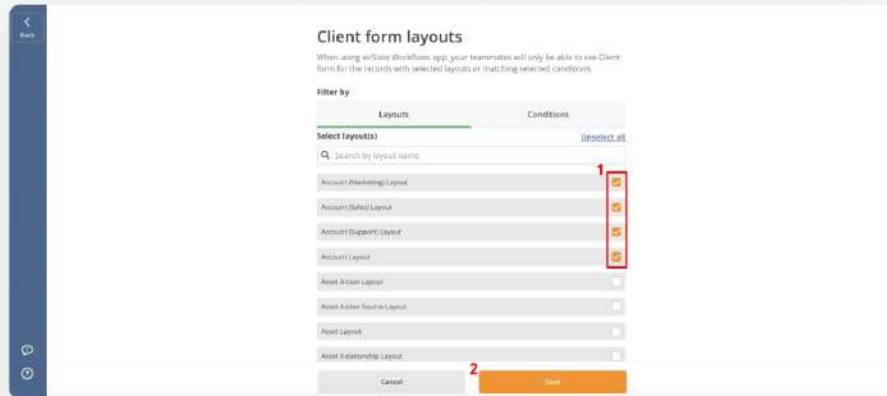


The page with the filter settings will open.

1. In the **Layouts** tab, choose your layouts by ticking their checkboxes. To select every layout in the list, click **Select all** above the Layouts search line. To unselect the selected layouts, click **Un-select all**.

Proceed to the Conditions settings or click **Save** to finish.

When in the altaFlow app, the list of workflows will be filtered according to the layout of the starting Salesforce record.

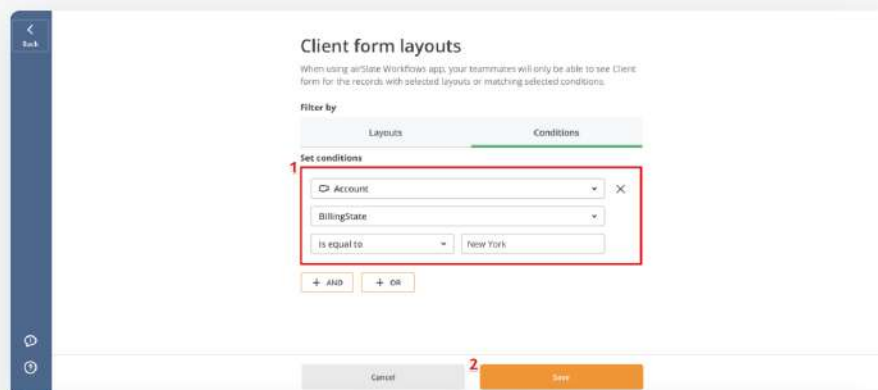


2. In the **Conditions** tab, you can set the conditions for filtering workflows in the altaFlow app.

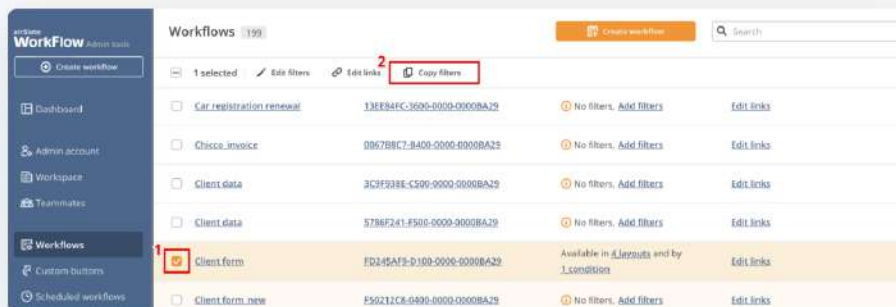
For example, you can set a condition for filtering your workflows by US state. To do so, choose the Salesforce object and the object field. Enter a value that the selected object field will be equal to:

Account → BillingState → is equal to → New York

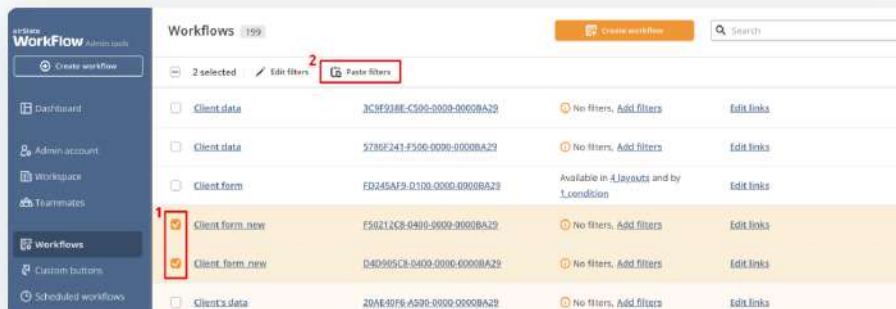
When finished, click **Save**.



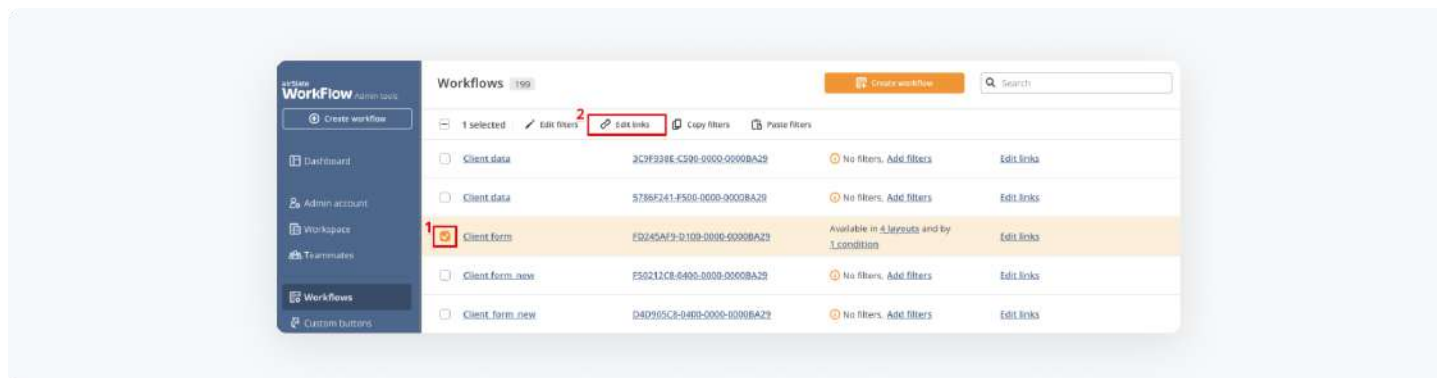
You can also copy the filter conditions from one workflow to another. To do so, select the checkbox next to the workflow you need and select **Copy filters**.



Then, to paste the copied filters, select the workflows you need and click **Paste filters**. The workflow you'll be copying filters from can remain unchecked.



You can also edit the workflow link's sharing options by selecting **Edit links**.



The **Workflow link settings** modal window. There are two types of workflow links you can use:

- **Shareable link** allows anyone with the link to access the workflow. Be sure to copy and share a new link for each separate role.
- **Smart link** - allows for configuring a link that will create a document in altaFlow, in a specific workflow. The smart link is tied to a specific Salesforce record so that it can be pre-filled with data from that record using the Pre-fill from Salesforce record bot, and can also write data back to that record, using the Update Salesforce record bot. The smart link should be copied to a Salesforce record's Formula field.

The workflow's shareable links are disabled by default. To activate them, switch the toggle. Once switched, you'll be able to copy a **shareable link** or **smart link** by clicking them.

Workflow links settings

Workflow links
☒
Disable shareable links

Shareable links

Your workflow can be accessible via shareable link. Link will be different for every workflow role. Link will be different for every workflow role. Copy the link for a role which you would like to distribute.

Recipient 1: <https://arsl.at/9GYwX0xB>

Smart links

Copy this formula into the formula field on the record. When the Pre-fill from Salesforce records bot is configured on the workflow, the link generated from the record will be pre-filled with the record data, according to the bot settings.

Recipient 1: [https://arsl.at/9GYwX0xB?id="&id](https://arsl.at/9GYwX0xB?id=)

Done

Scheduled workflows

Schedule your documents to be created with regards to specific workflows. Simply set the date and time, and your workflows will be run automatically according to your settings.

1. To begin scheduling, select **Create schedule**.

If you haven't created any schedules yet, click **Set up now** at the bottom to set up your first scheduled workflow.

AltaFlow
Admin tools

Create workflow

Dashboard
Admin account
Workspace
Teammates
Workflows
Custom buttons
Scheduled workflows

Scheduled workflows

Create schedule

Search

Schedule name
Workflow to run
Frequency

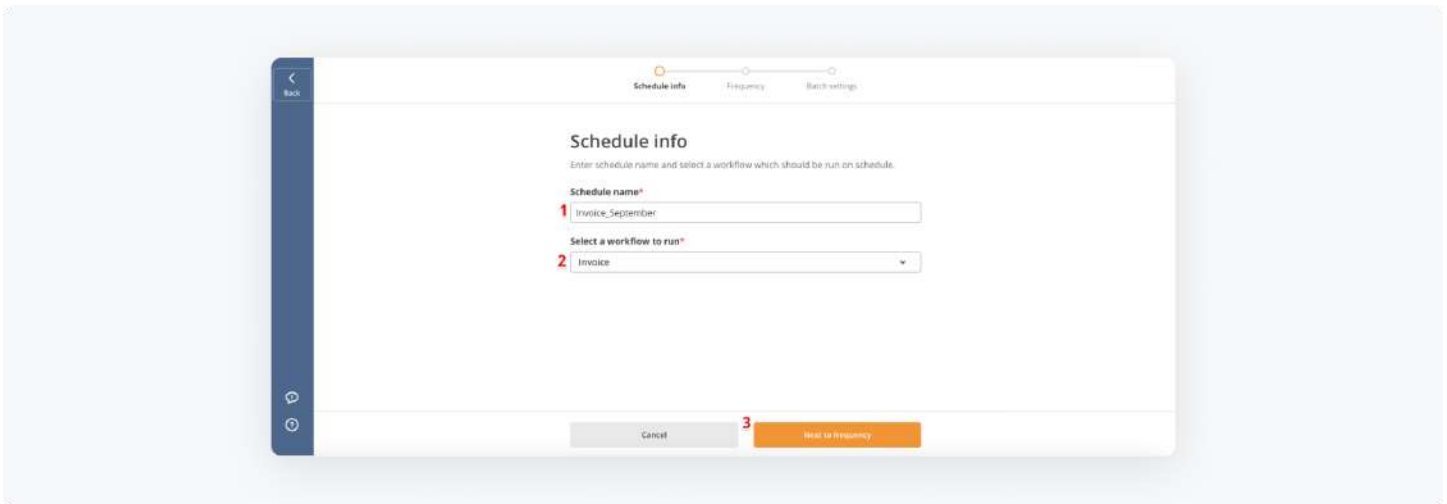
Configure your first scheduled workflow

Use the scheduler to run workflows automatically. All scheduled workflows that you create will be listed here.

Set up now

2. The **Schedule wizard** will open. In the **Schedule info** tab, enter a name for the schedule being created. Select the workflow you'd like to use for your schedule.

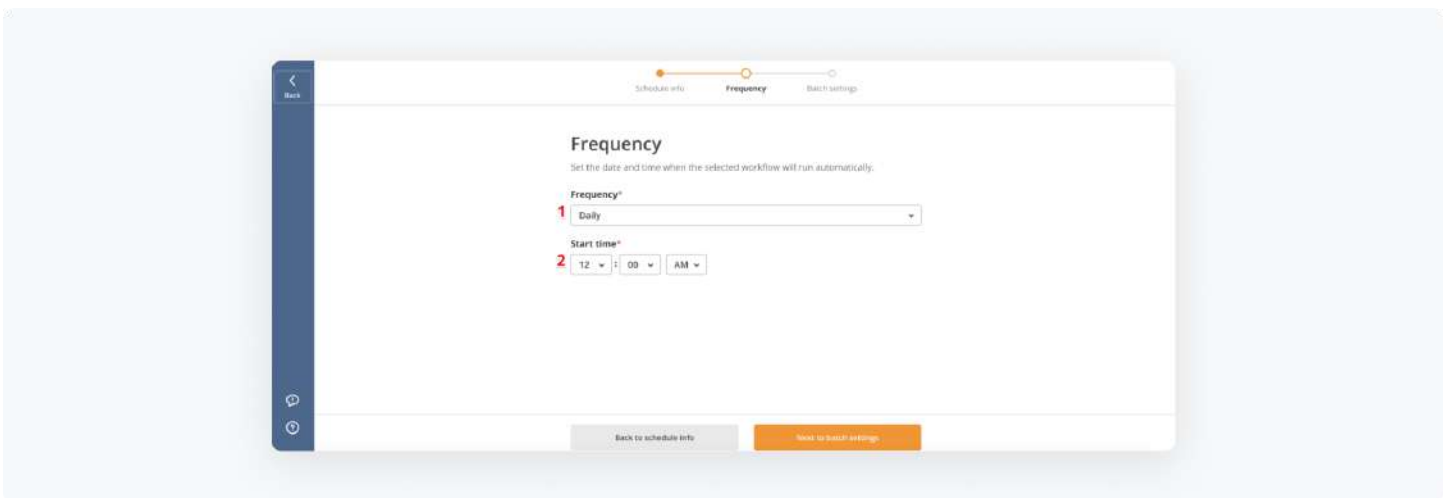
Select **Next to frequency** to proceed. Alternatively, switch to the **Frequency** tab.



The screenshot shows the 'Schedule info' tab of the 'Schedule wizard'. The tab has a title bar with 'Schedule info', 'Frequency', and 'Batch settings'. Below the title bar, there is a subtitle 'Enter schedule name and select a workflow which should be run on schedule.' The main content area contains two fields: 'Schedule name*' with the value 'Invoice_September' and 'Select a workflow to run*' with the value 'Invoice'. At the bottom, there are two buttons: 'Cancel' and 'Next to frequency'. The 'Next to frequency' button is highlighted in orange.

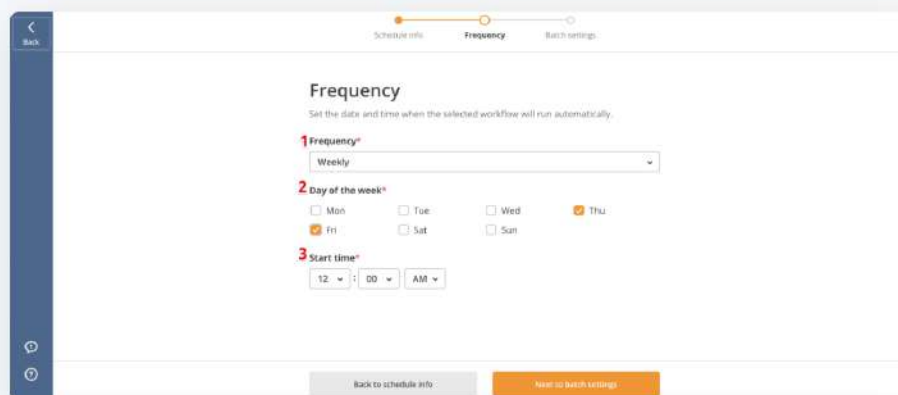
In the **Frequency** tab, specify how often you'd like your workflow to run (daily, weekly, on specific days of a month, using custom dates or Cron expression) and set a starting point:

- If **Daily**, specify the starting time for the workflow to run.



The screenshot shows the 'Frequency' tab of the 'Schedule wizard'. The tab has a title bar with 'Schedule info', 'Frequency', and 'Batch settings'. Below the title bar, there is a subtitle 'Set the date and time when the selected workflow will run automatically.' The main content area contains two fields: 'Frequency*' with the value 'Daily' and 'Start time*' with the value '12:00 AM'. At the bottom, there are two buttons: 'Back to schedule info' and 'Next to batch settings'. The 'Next to batch settings' button is highlighted in orange.

- If **Weekly**, choose the days of the week (one or more) and the starting time for the workflow to run.



Frequency

Set the date and time when the selected workflow will run automatically.

1 Frequency*
Weekly

2 Day of the week*

☐ Mon ☐ Tue ☐ Wed ☒ Thu
☒ Fri ☐ Sat ☐ Sun

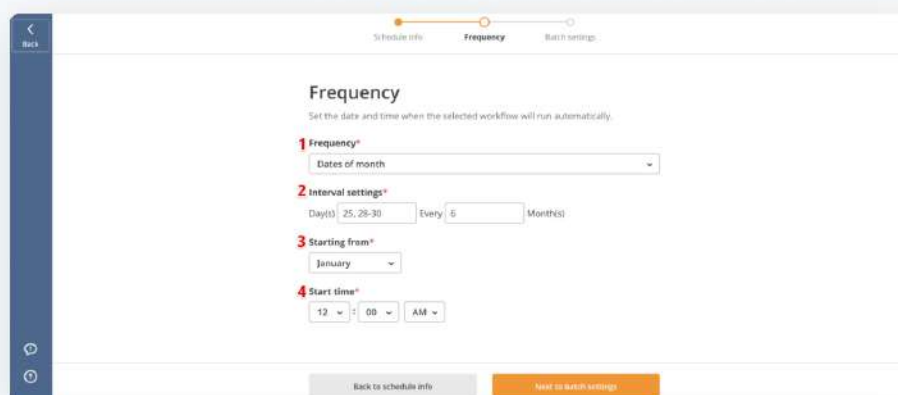
3 Start time*
12 : 00 AM

[Back to schedule info](#) [Next to batch settings](#)

- If **Dates of month**, specify the dates of the month by dividing them with a comma, or specific periods of time by using a dash (example: 1, 5-7, 25 etc.). Enter a month value from 1-12.

Choose the month your workflow will be started from with the specified frequency and set the starting time.

Your workflow will run each day of each month you've specified starting from the specific month.



Frequency

Set the date and time when the selected workflow will run automatically.

1 Frequency*
Dates of month

2 Interval settings*

Days: 25, 28-30 Every: 6 Months

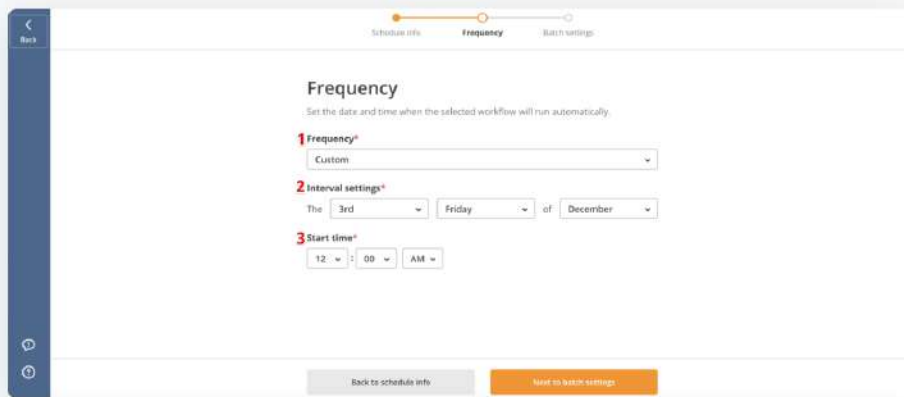
3 Starting from*
January

4 Start time*
12 : 00 AM

[Back to schedule info](#) [Next to batch settings](#)

- If **Custom**, specify the numerical sequence of the day of the week, choose the day of the week and the month for your workflow to run. Set the starting time for running your workflow.

Example: The workflow will run each 3rd Friday of December, starting from 12 am.



- If **Cron expression**, enter the Cron expression with the set frequency for running your workflow.

The following are the values for the Cron expression:

Name	Value
Seconds	0-59
Minutes	0-59
Hours	0-23
Day_of_month	1-31
Month	1-12
Day_of_week	1-7
optional_year	null or 1970-2099
?	no value

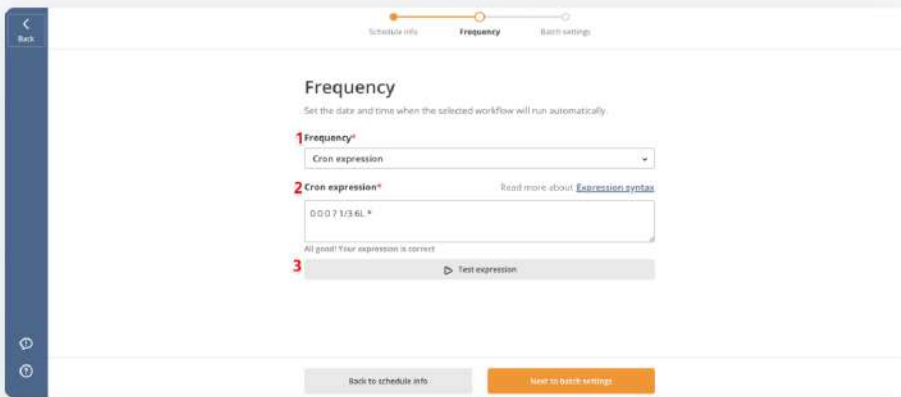


*	all values
L	last

Examples:

Expression	Description
0 0 0 ? * * *	at 12:00 AM every day
0 0 10 ? * * *	at 10:00 AM every day
0 0 10 * * ?	at 10:00 AM every day
0 0 10 * * ? *	at 10:00 AM every day
0 0 15 ? * * *	at 3:00 PM every day
0 0-5 15 * * ?	Every minute starting at 3:00 PM and ending at 3:05 PM, every day
0 15 17 ? * MON-FRI	at 5:15 PM every Monday, Tuesday, Wednesday, Thursday and Friday
0 15 10 15 * ?	at 5:15 PM on the 15th day of every month
0 15 17 ? * 6#3	at 5:15 PM on the third Friday of every month
0 0 18 ? * 6L	runs the last Friday of every month at 6:00 PM
'0 30 * * * *';	every 30 minutes
0 0 12 * * ?	at 12:00 PM every day
0 0 23 * * ? 2016	runs every day at 11:00 PM during the year 2016

Once entered, select **Test expression** to check if it has been entered correctly.



The screenshot shows the 'Frequency' configuration page in the AltaFlow interface. At the top, there are three tabs: 'Schedule info', 'Frequency' (which is active), and 'Batch settings'. Below the tabs, the 'Frequency' section is titled 'Frequency' with a subtitle 'Set the date and time when the selected workflow will run automatically.' There are three numbered steps: 1. 'frequency*' with a dropdown menu showing 'Cron expression'; 2. 'Cron expression*' with a text input field containing '0 0 0 ? 1/3 6L *' and a link to 'Read more about Expression syntax'; 3. 'All good! Your expression is correct' with a 'Test expression' button. At the bottom, there are two buttons: 'Back to schedule info' and 'Save to batch settings'.

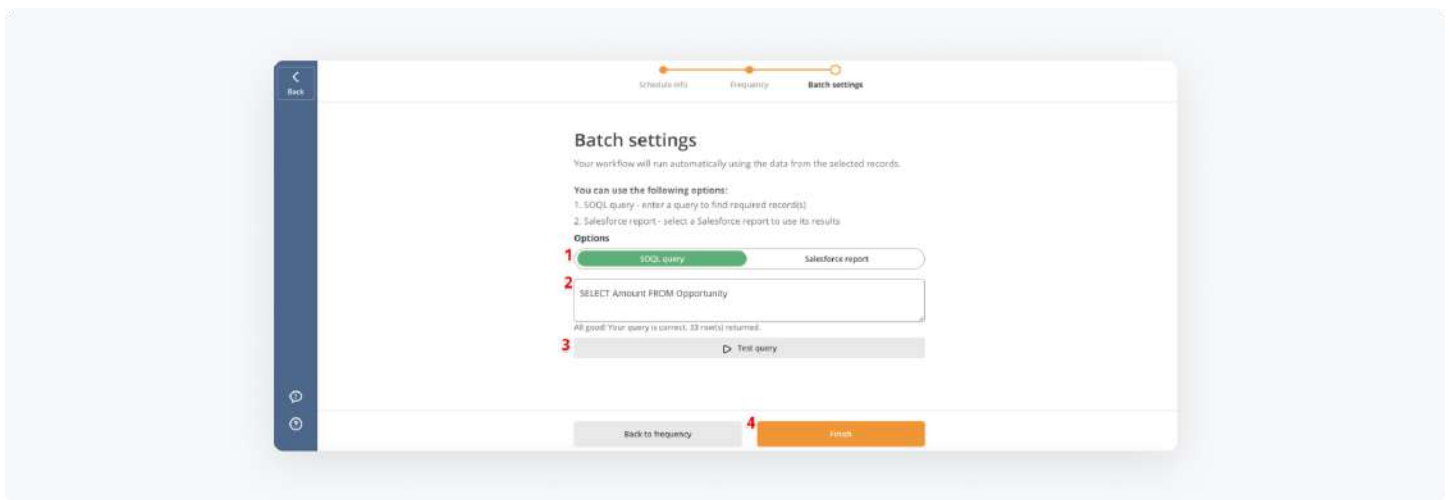
Once the frequency for running your workflow has been set, select **Next to batch settings** to proceed. Alternatively, switch to the **Batch settings** tab.

In the **Batch settings** tab, choose a method for creating your documents:

- Selecting **SOQL query** and entering a query will set parameters for Salesforce records and record data to be selected and used to create a document.

Enter a SOQL query, then select **Test query** to check if it has been entered correctly.

Here you will find the [Query constructor](#) that will help you build the correct SOQL query.



Once done, click **Finish**.

- Selecting a **Salesforce report** allows for Salesforce records to be selected and use data to create a document.

Select the Salesforce report you'd like to use.

Here you'll find standard Salesforce objects for creating documents of certain standard Salesforce report types:

Accounts & Contacts:

Account => "Accounts", "Accounts with Partners", "Account with Account Teams", "Accounts with Contact Roles", "Accounts with Assets", "Account History".

DandBCompany => "D&B Company with and without Accounts".

Contact => "Contacts & Accounts", "Contacts with Assets", "Contact History".

Opportunities:

Opportunity => "Opportunities", "Opportunities with Products", "Opportunities with Contact Roles", "Opportunities with Partners", "Opportunities with Competitors", "Opportunity History", "Opportunity Field History", "Opportunity Trends", "Opportunities with Contact Roles and Products".

Customer Support Reports:

Case => "Cases", "Case Lifecycle", "Cases with Contact Roles", "Cases with Assets", "Cases with Solutions", "Case History".

Solution => "Solutions", "Solution Categories", "Solution History".

Leads:

Lead => "Leads", "Leads with converted lead information", "Lead History".

Campaigns:

Campaign => "Campaigns", "Campaigns with Contacts", "Campaigns with Leads", "Campaigns with Opportunities", "Campaigns with Campaign Members", "Campaigns with Leads and Converted Lead Information", "Campaigns with Influenced Opportunities".

Activities:

ActivityHistory => "Tasks and Events", "HTML Email Status", "Activities with Accounts", "Activities with Contacts", "Activities with Opportunities", "Activities with Leads", "Activities with Campaigns", "Activities with Cases", "Activities with Solutions", "Activities with Contracts", "Activities with Products".

Event => "Events with Invitees".

Contracts and Orders:

Contract => "Contracts", "Contract History", "Contracts with Orders", "Contracts with Orders and Products", "Contracts with Contact Roles".

Order => "Orders", "Orders with Products", "Order History".

Price Books, Products and Assets:

Product2 => "Products", "Products with Opportunities", "Products with Assets".

Pricebook2 => "Price Books with Products".

Asset => "Assets", "Assets with Cases".

Administrative Reports:

User => "Users".

Report => "Reports".

Document => "Documents".

LoginGeo => "New Login Locations".

VerificationHistory => "Identity Verification Methods".

CollaborationGroup => "Collaboration Group Report".

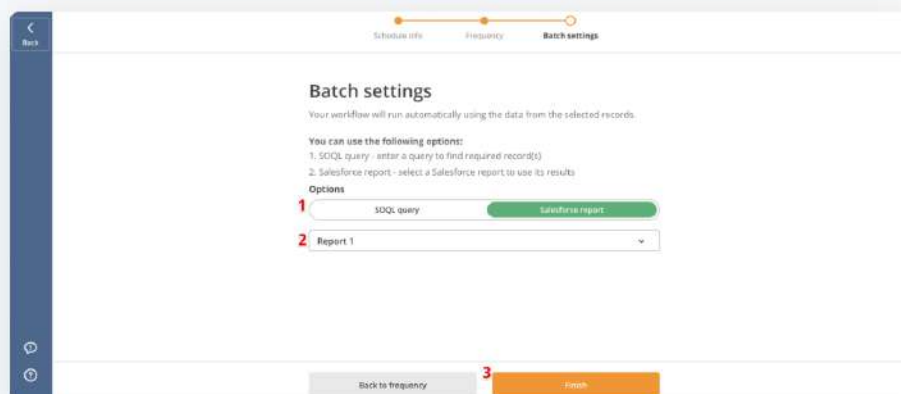
CollaborationGroupFeed => "Collaboration Group Feed Posts Report".

File and Content Reports::

ContentDocument => "Content Report", "File and Content Report"

ContentFolder => "Library and User Report".

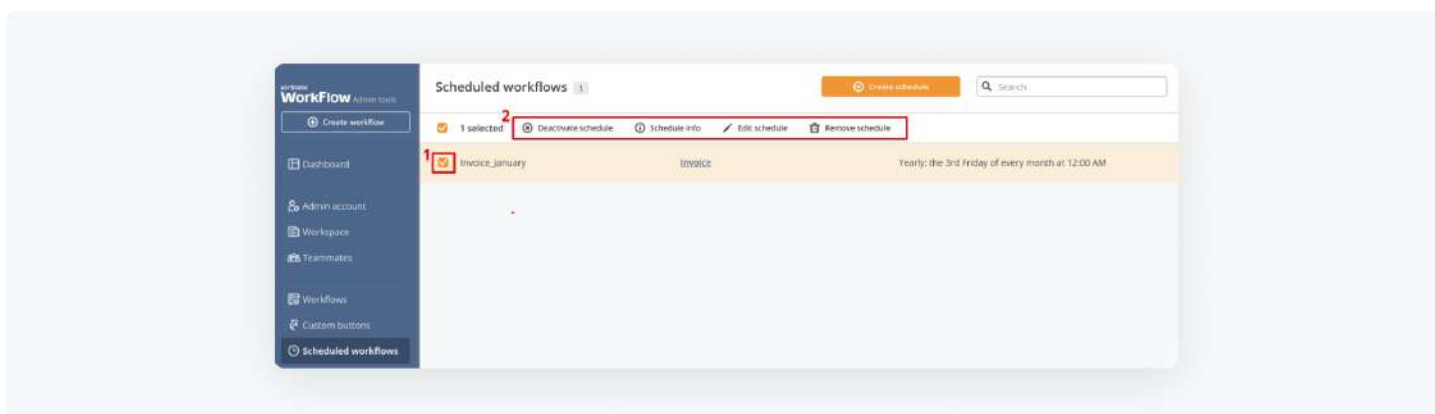
Once done, click **Finish**.



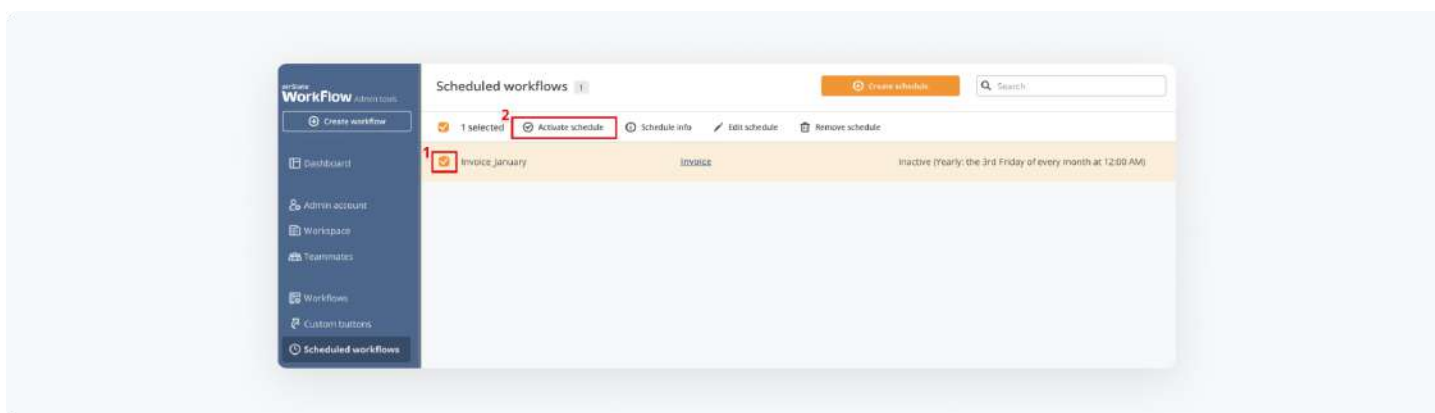
The scheduled workflow will be added to your **Scheduled workflows** list.

Clicking a scheduled workflow's name will open it in the altaFlow application along with all related revisions.

To edit, remove, deactivate, or get detailed schedule information, select the checkbox next to the schedule you need. Then, select the corresponding option.



Reactivate a deactivated schedule by selecting the checkbox next to the schedule you need and select **Activate schedule**.



Once the scheduled batch has been run, you will be notified via email on how documents were generated for selected records.

Custom buttons

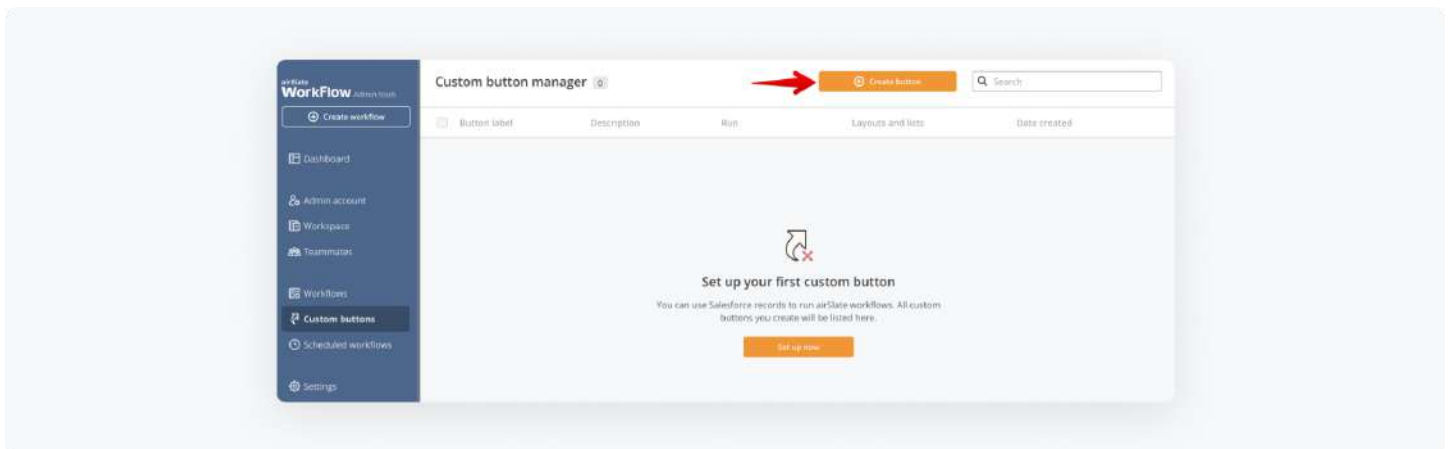
Switching to the **Custom buttons** tab will open the **Custom button manager**. Use the manager to create quick send buttons with regards to altaFlow workflows and add them directly to your Salesforce records.

Creating custom buttons

Connect altaFlow to Salesforce, so users can create documents in altaFlow directly from Salesforce using existing Salesforce data.

To let Salesforce users create new documents, first, set up a custom button in altaFlow Admin Tools. Navigate to **App Launcher** → **View all** → **altaFlow Admin Tools**.

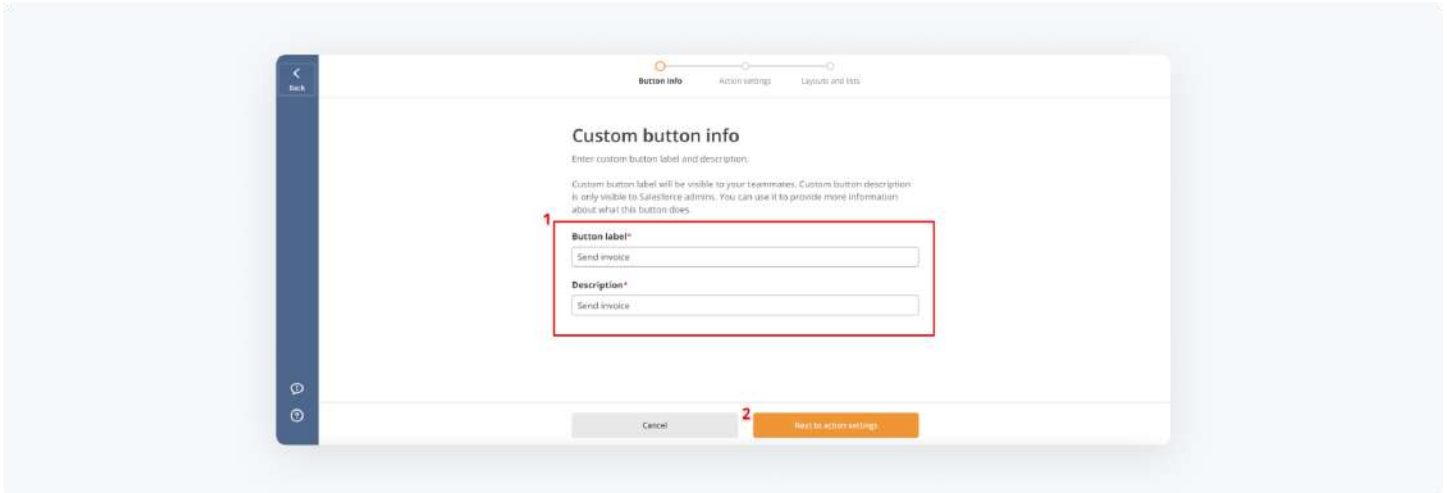
Once opened, navigate to the **Custom buttons** tab. Then, click **Create button**.



When the Custom button wizard opens, add a label (visible on the record page) and a description (automatically generated after clicking the field).

Tip: The label appears on the record page for users. The description is for internal notes or administrators.

Click **Next to action settings** to proceed. Alternatively, switch to the **Action settings** tab.



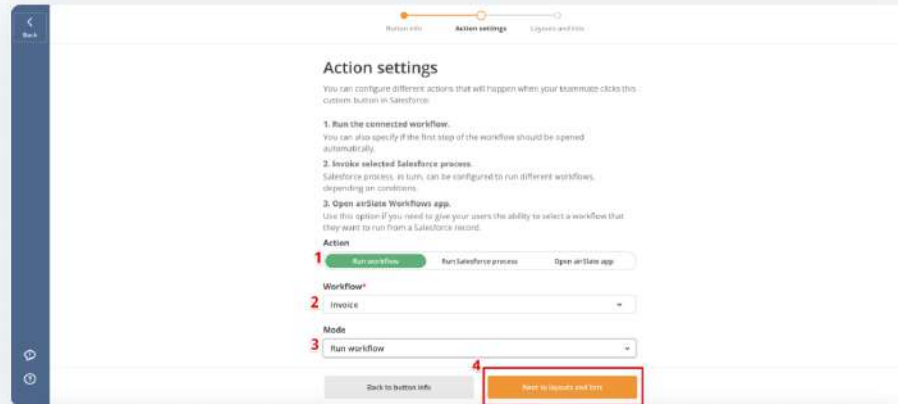
In the **Action settings** tab, choose an action:

1. **Run workflow**: Automatically create documents in altaFlow from Salesforce. Choose from options like opening in a new tab or within Salesforce:

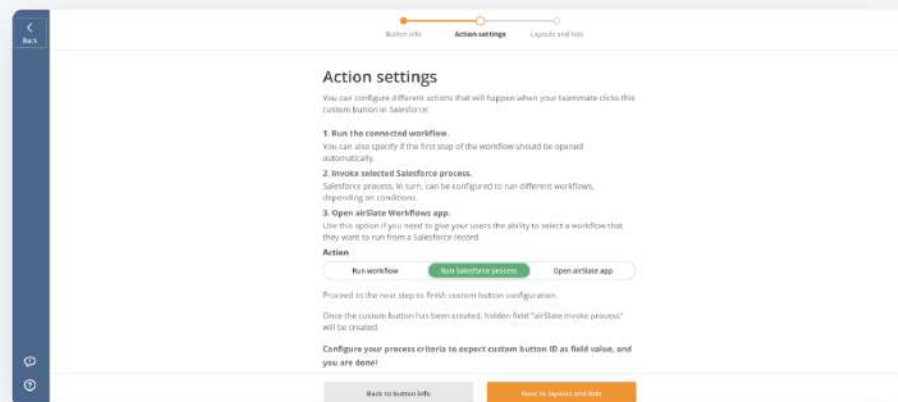
- Selecting **Run workflow & open the first step in a new tab** (single record only) creates a document and then automatically opens it in the altaFlow editor in a new browser tab. This mode is set by default.
- Selecting **Run workflow & open the first step in IFrame** (single record only) creates a document and opens it within Salesforce.
- Selecting **Run workflow** creates a document with regards to the selected workflow.



Note: The **Run workflow** mode must be selected when creating the **List Views custom buttons**.



2. Selecting **Run Salesforce Process** triggers the Salesforce Process to run different altaFlow workflows, depending on the Salesforce record data.



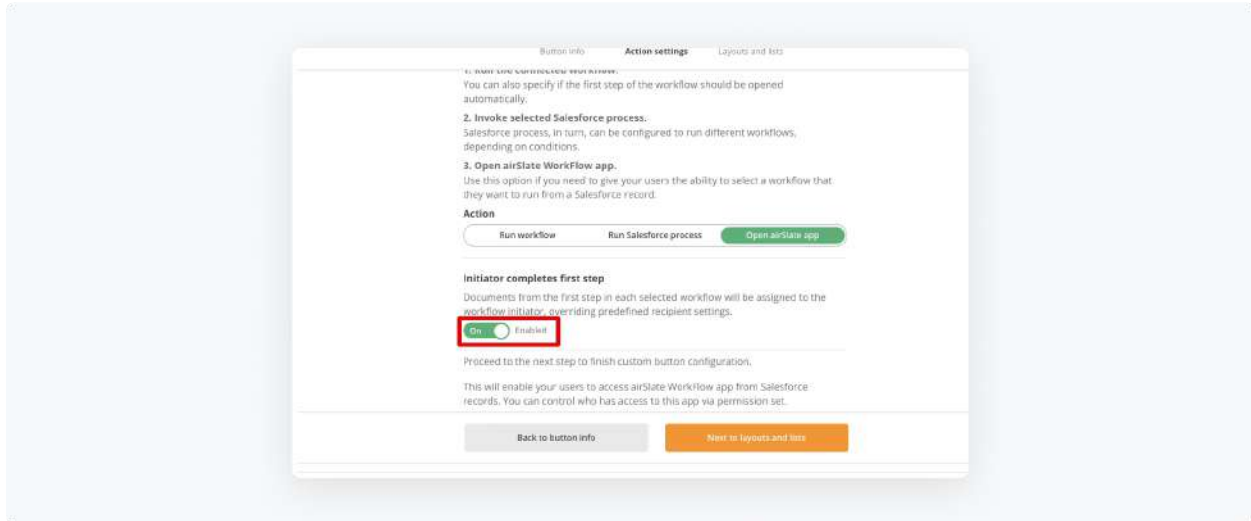
3. Selecting **Open altaFlow app**, opens the altaFlow app for managing altaFlow workflows without leaving Salesforce.

By default, the invitation to complete documents overrides the indicated recipient in the **first step** and is sent to **workflow initiator** (the user who triggers the workflow in Salesforce).

To ensure the invitation goes to the intended recipient, disable the **Initiator completes first step** option.

Even if a different recipient is configured in the workflow, the email is still sent to the initiator in the following cases:

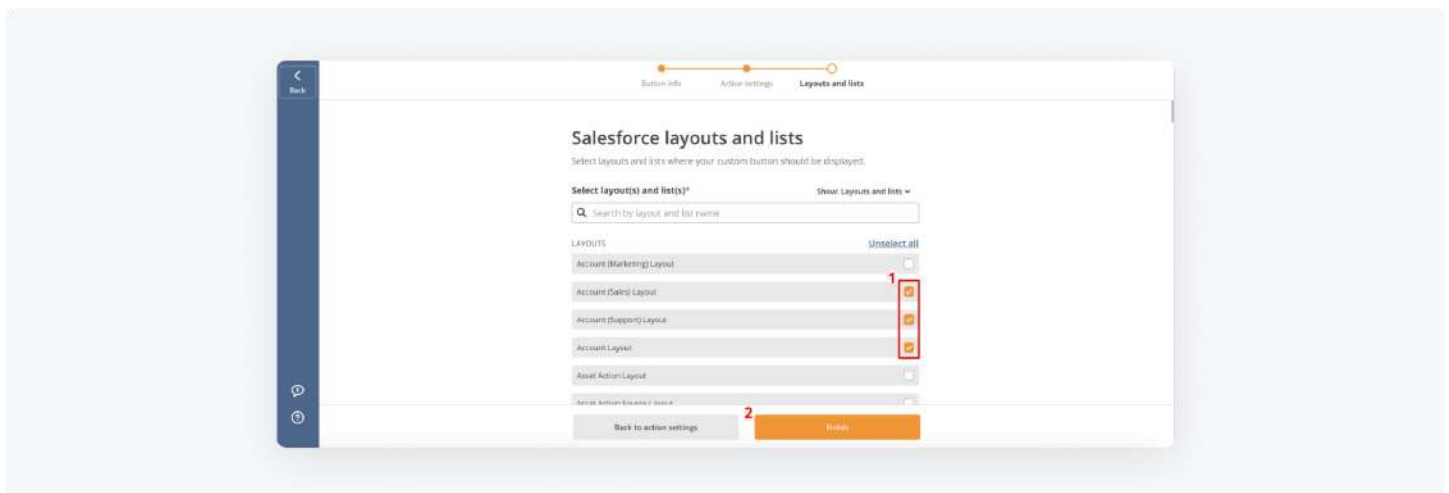
- The workflow starts from a branch;
- The recipient's email is defined based on a dynamic value (from a document or bot);
- The recipient's email is not specified.



Once selected, click **Next to layouts and lists** to proceed. Alternatively, switch to the **Layouts and lists** tab.

In the **Layouts and lists** tab, select a Salesforce object layout or list (or several) where the button will be added by ticking the checkbox next to them.

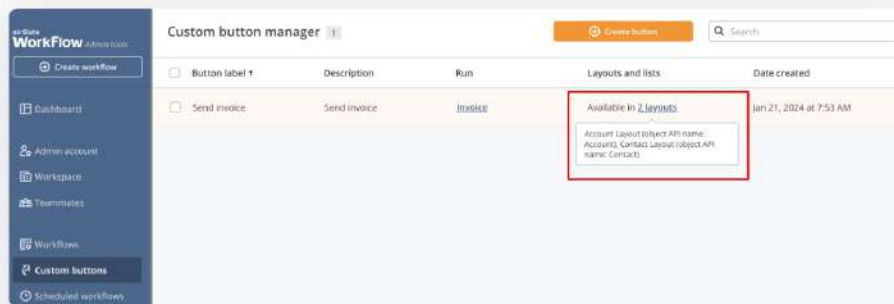
- Choose **Layouts** to add the button to each record
- Choose **Lists** to allow sending documents to multiple users at once in List Views.



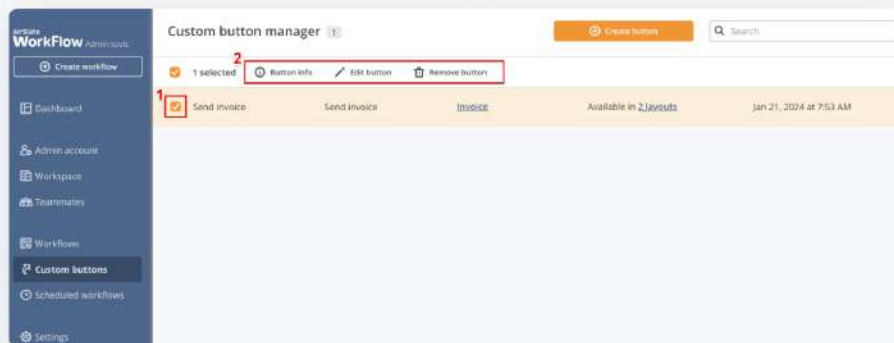
Use the quick find to search for layouts and lists. Select whether to view the lists, the layouts or both in the **Show layouts and lists** drop down. When done, click **Finish**.

The button is now created and added to your Salesforce objects or List Views.

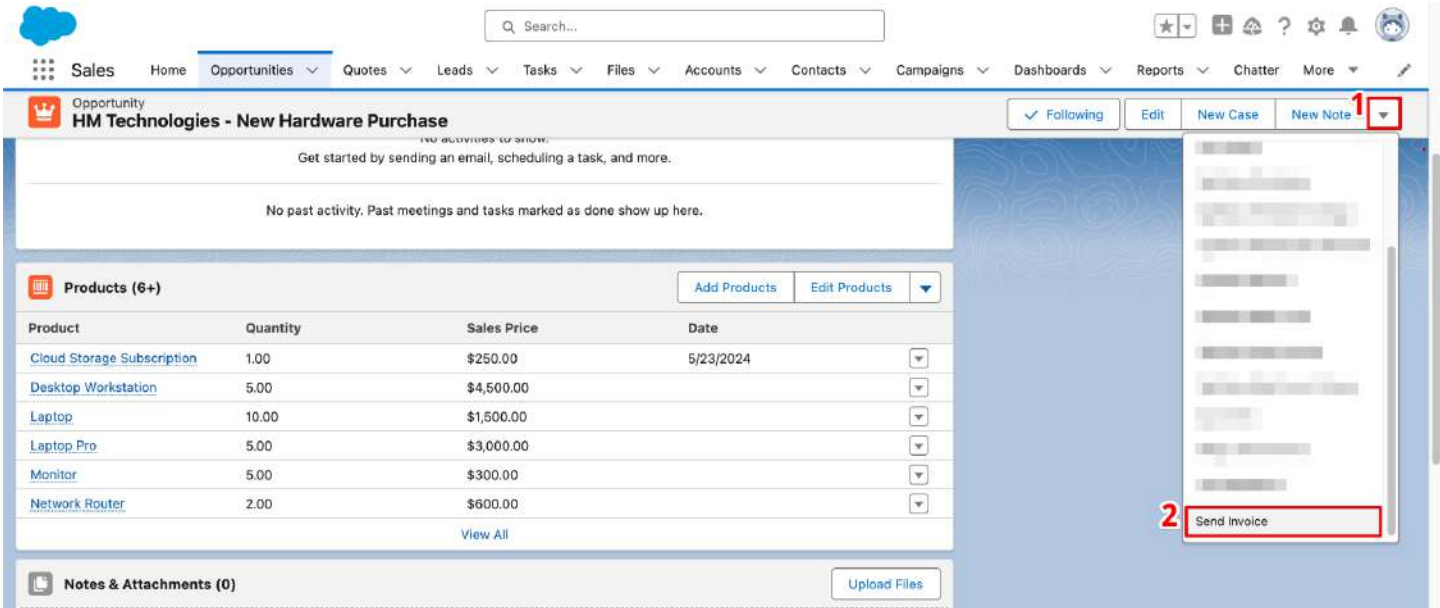
To view what lists and layouts a custom button has been added to, hover over the number of lists and layouts.



To edit, remove, or view details for a created custom button, select the checkbox next to it. Then, choose the corresponding action.



Proceed to the Salesforce records to start using it with your altaFlow workflow.



Adding buttons to a Digital Experience site

If you'd like to use altaFlow custom buttons on a Digital Experience portal, you'll need to configure them manually. To do so, please follow the steps below:

1. Once a Custom button has been successfully added to the Digital Experience layout, go to **Setup**.
2. Search for **All Sites** in the Quickfind. Then, copy the link of the Digital Experience site you need.
3. Proceed to the **Object Manager**. Then, select the Digital Experience site layout you've added your button to.
4. Select **Buttons, Links, and Actions**. Then, click **Edit** next to the button you've created.
5. Paste the copied link of the Salesforce Digital Experience site before **/apex**. Make sure you do not delete any existing text that was previously entered.
6. When finished, click **Save** to keep your changes.
7. go to **Setup**, search for **Sharing Settings** in the Quickfind.
8. Click **Edit**.
9. Scroll to locate the **altaFlow Button** object. Ensure that its **Default External Access** is set to at least **Public Read Only** to allow external users to access it through the Digital Experience site.

Running a Salesforce Process via a custom button

Once you've created a custom button for running a Salesforce Process, proceed to the Salesforce Process Builder to set up your Salesforce Process.

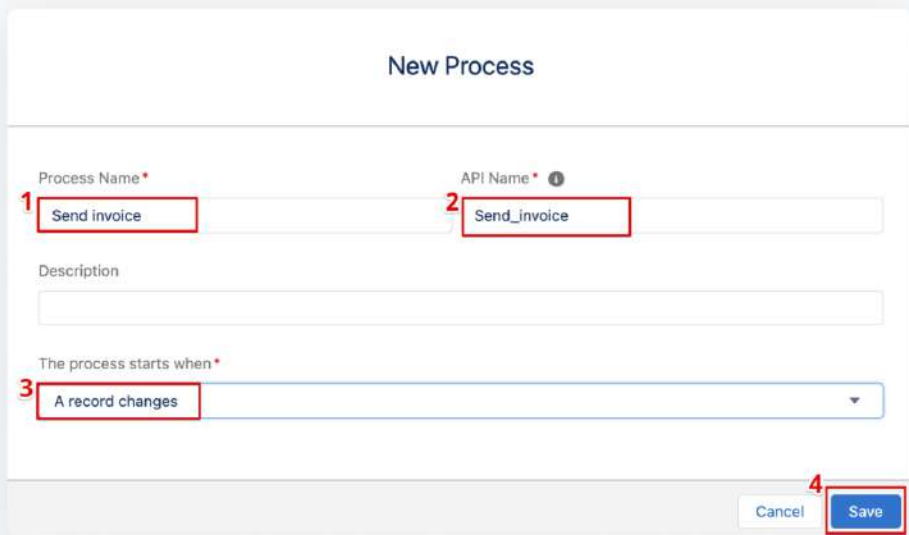
How it works:

1. Create a new Salesforce Process (see how to do this in the Salesforce Process Builder section of this user guide).

In the **New Process** pop-up, enter a name for the process. The API name will be entered automatically right after clicking the **API Name** field.

Define the action that will act as the trigger for creating a document according to a specific workflow (in the example, **the process starts when a record changes**).

When finished, click **Save**.



The screenshot shows a 'New Process' dialog box. It has a title bar 'New Process'. Below the title bar, there are four fields: 'Process Name' with the value 'Send invoice' (labeled 1), 'API Name' with the value 'Send_invoice' (labeled 2), 'Description' (empty), and 'The process starts when' with the value 'A record changes' (labeled 3). At the bottom right, there are two buttons: 'Cancel' and 'Save' (labeled 4).

2. Next, the Process Builder diagram will open.

Click **Add Object** to select the object for which you are creating a process.

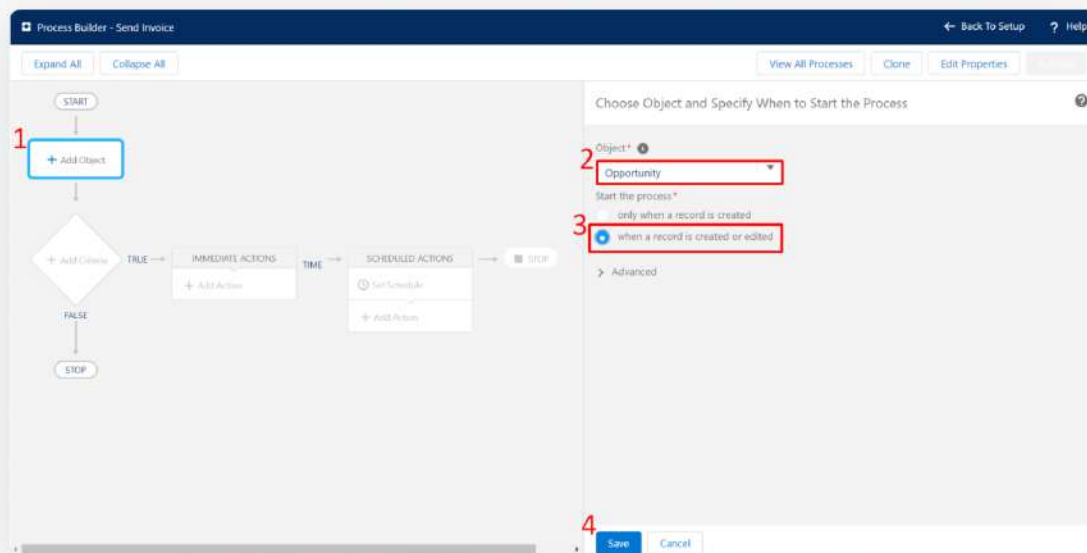
In the **Object** dropdown, choose the object you'd like to base this process on (**Opportunity** in the example).

Select **When a record is created or edited** to specify when to start the process.

When finished, click **Save**.



Note: Before saving your changes, confirm the selection. You won't be able to change the object after saving it.



3. Select **Add Criteria**. Enter a name for the criteria (**Selected checkbox**, in the example).

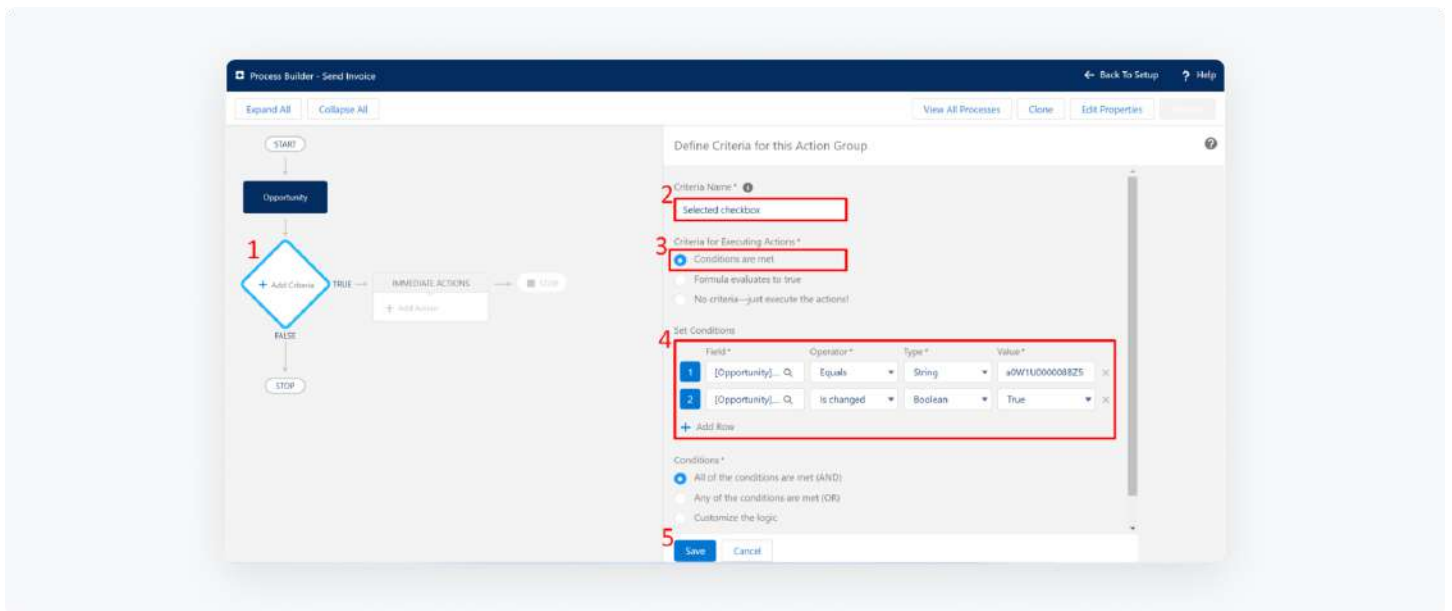
The name you enter will appear on the canvas. We recommend using a name that helps you differentiate between other criteria nodes.

Select **Conditions are met** for the criteria type to execute actions.

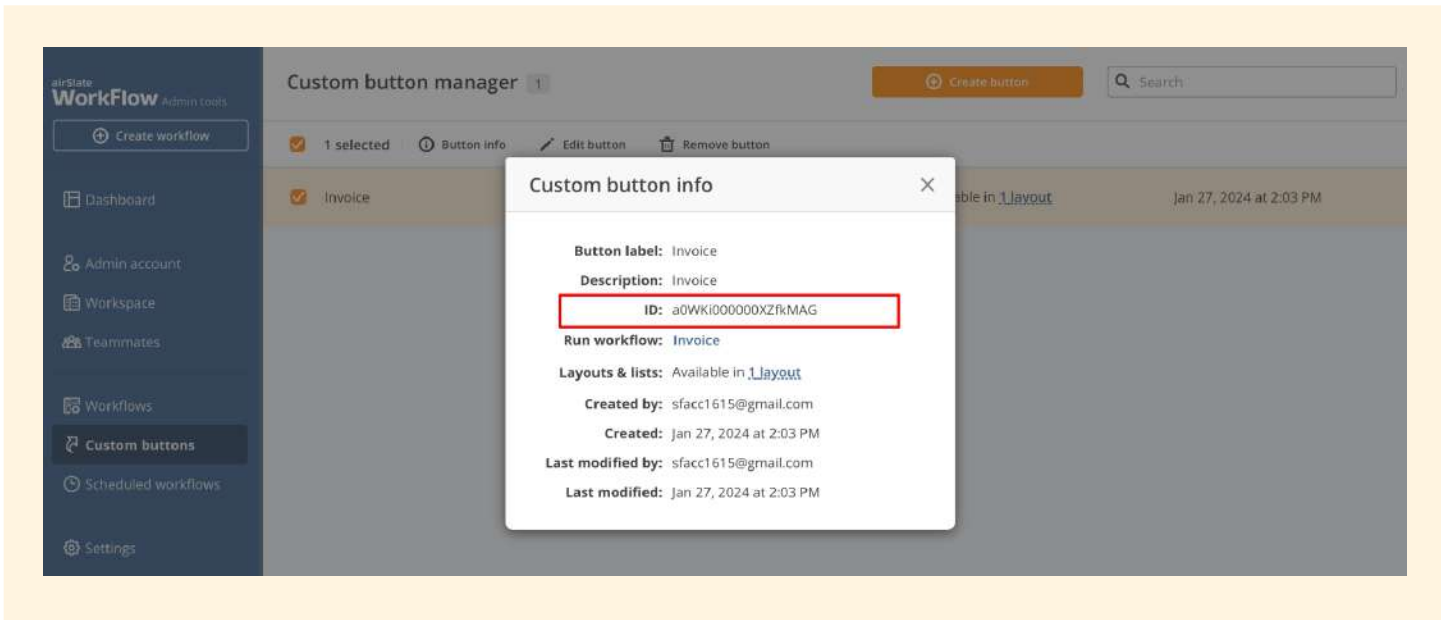
In the **Set Conditions** section, provide the following data:

- For the first row: field (required field): **altaFlow Invoke Process** → operator (required field): **equals** → type (required field): **string** → value (required field): **custom button ID***.
- For the second row: field (required field): **altaFlow Invoke Process** → operator (required field): **is changed** → type (required field): **boolean** → value (required field): **true**.

Next fields can be set up according to the conditions you need. When finished, click **Save**.



👉 To retrieve the custom button ID, go to **altaFlow Admin Tools** and switch to the **Custom button** section. Select the custom button you need. Then, select **Button info** and copy the custom button ID.

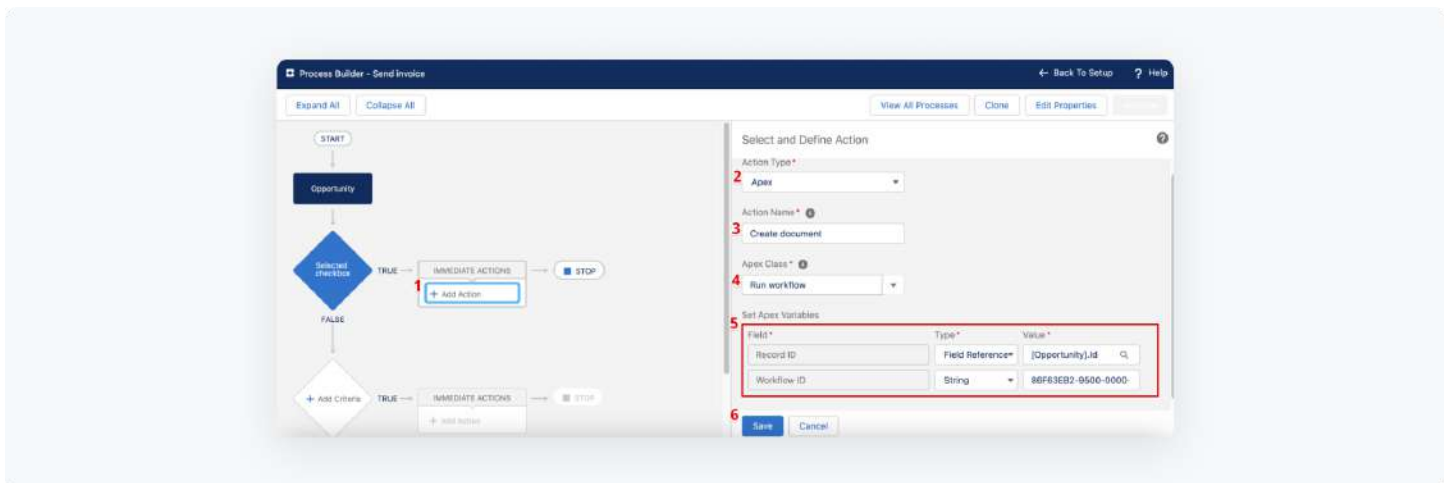


4. Follow the TRUE arrow and in the **Immediate Actions** section, select **Add Action**.

For the action type, select **Apex** from the dropdown menu. Enter the action name (**Create document**, in the example). For the Apex class, select **Run workflow**.

Once the Apex class has been defined, the **Apex Variables** section will appear.

- For the workflow ID (required field) → type: **String** → value: **workflowId***.
- For the record ID (required field) → type: **Field Reference** → value: Contact Id, Campaign Id, Campaign Member Id, etc.)



👉 To find a **workflow ID**, go to the **altaFlow Admin Tools**, then select the **Workflows** tab. Click on the workflow ID to copy it.

Workflow name	Workflow ID	Filters	Workflow links
Client data	5786F241-F500-0000-00008A29	No filters, Add filters	Edit links
Client form	FD245AF9-D100-0000-00008A29	Available in 4 layouts	Edit links
Client form new	F50212C8-0400-0000-00008A29	No filters, Add filters	Edit links
Client form new	D4D905C8-0400-0000-00008A29	No filters, Add filters	Edit links
Client's data	20AE40F6-A500-0000-00008A29	No filters, Add filters	Edit links

When all settings have been specified, click **Save**.

If you intend to use this process via the altaFlow custom button, make sure to add an action that will clear the altaFlow Invoke Process field:

1. In your Salesforce Process, select **Add Criteria**. Enter a name for the criteria (**Clear altaFlow field**, in the example).

Select **Conditions are met** for the criteria to execute the actions.



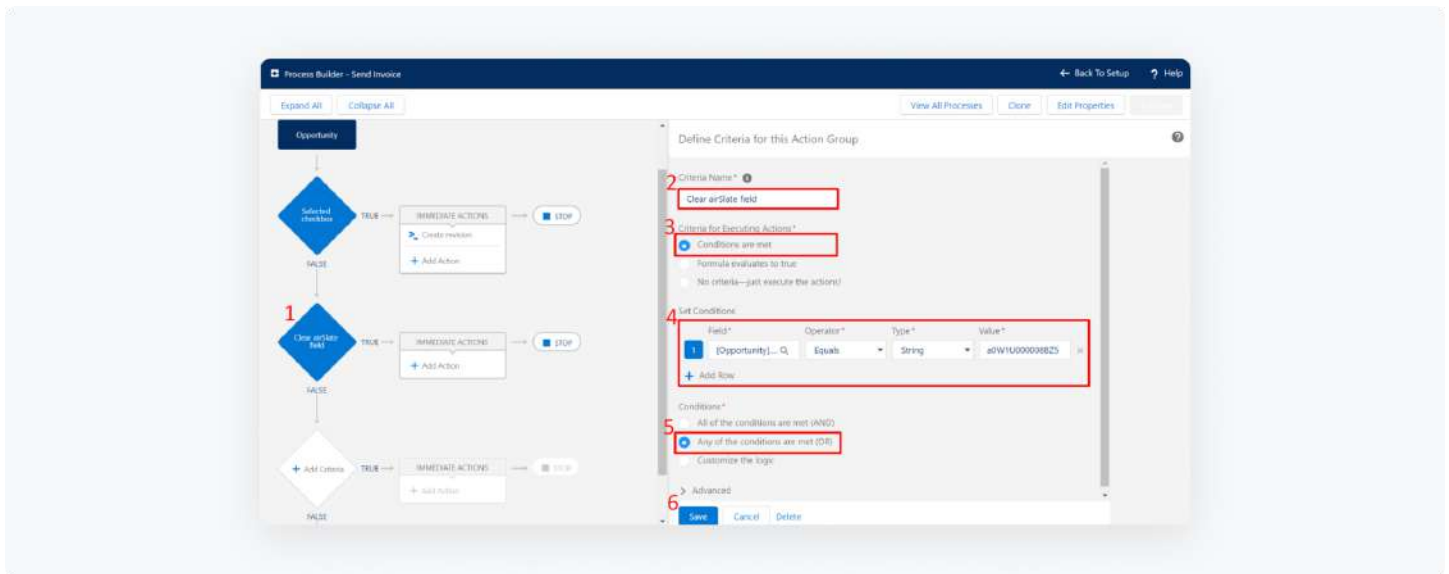
Note: It is required to specify a **custom button ID** for each custom button in the process.

In the **Set Conditions** section, provide the following data:

Field (required field): **altaFlow Invoke Process** → Operator (required field): **equals** → Type (required field): **string** → Value (required field): **Custom Button ID***.

For the conditions type, select **Any of the conditions are met (OR)**

Once done, select **Save**.



2. Follow the TRUE arrow and in the **Immediate Actions** section, select **Add Action**.

For the **Action Type**, select **Update Records** from the dropdown menu.

Enter the Action name (**Clear altaFlow field**, in the example).

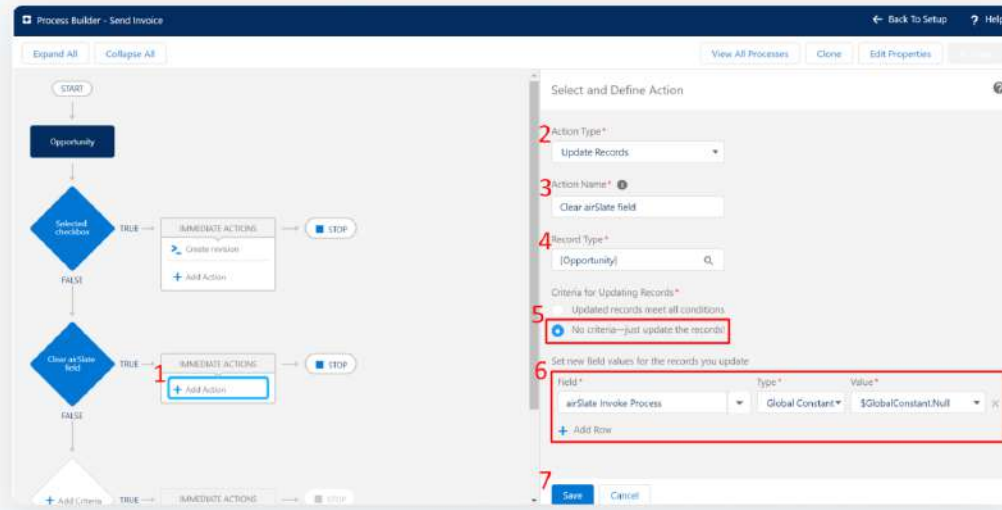
For the **Record**, choose the record that started your process (Opportunity record in the example).

For the **Criteria for Updating Records**, select **No criteria - just update the records!**

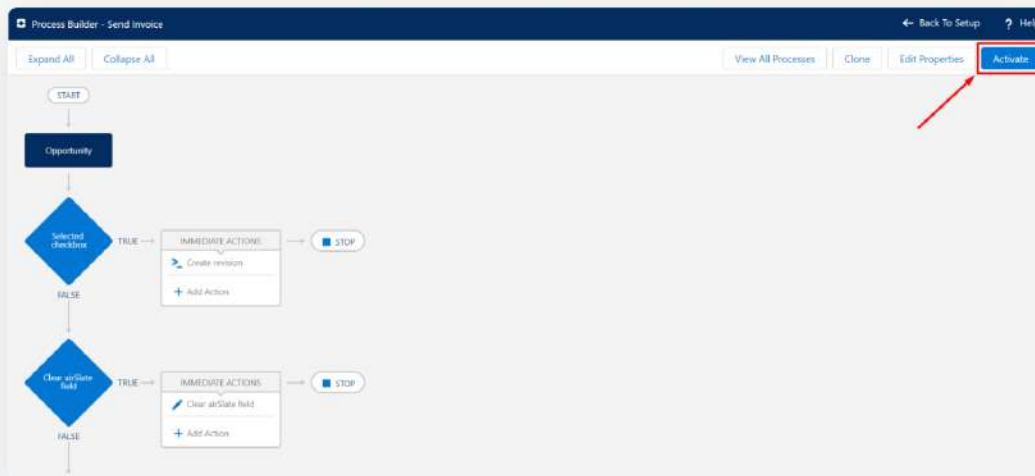
Set new field values for the records you update using the following:

Field (required field): **altaFlow Invoke Process** → Type (required field): **Global Constant** → Value (required field): **GlobalConstant.Null**.

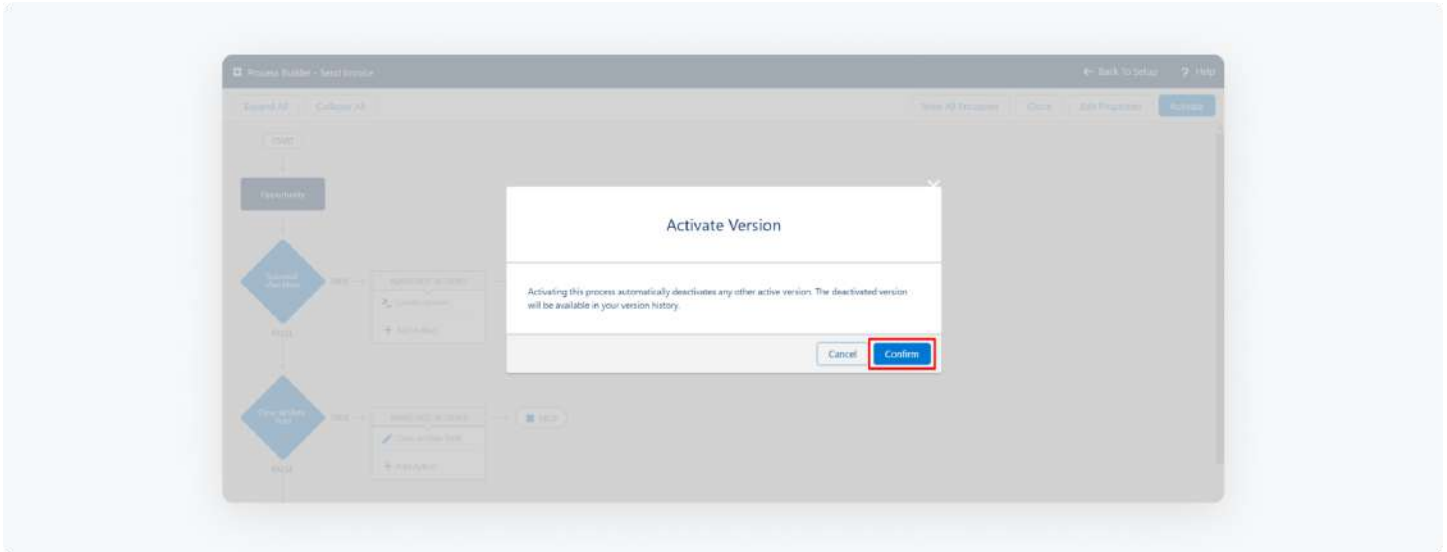
When finished, click **Save**.



To activate the Process Builder, select **Activate** on the **Process Builder settings** page.



In the **Activate Version** pop-up, select **Confirm**.

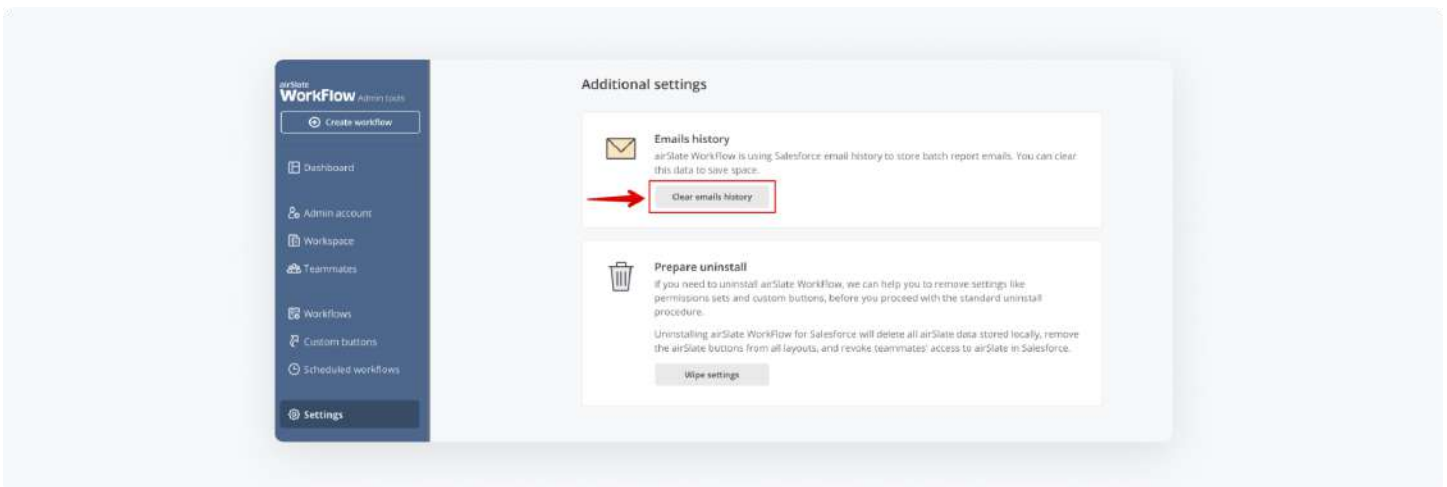


🎉 That's it! Your Salesforce Process will be activated any time you click the custom button.

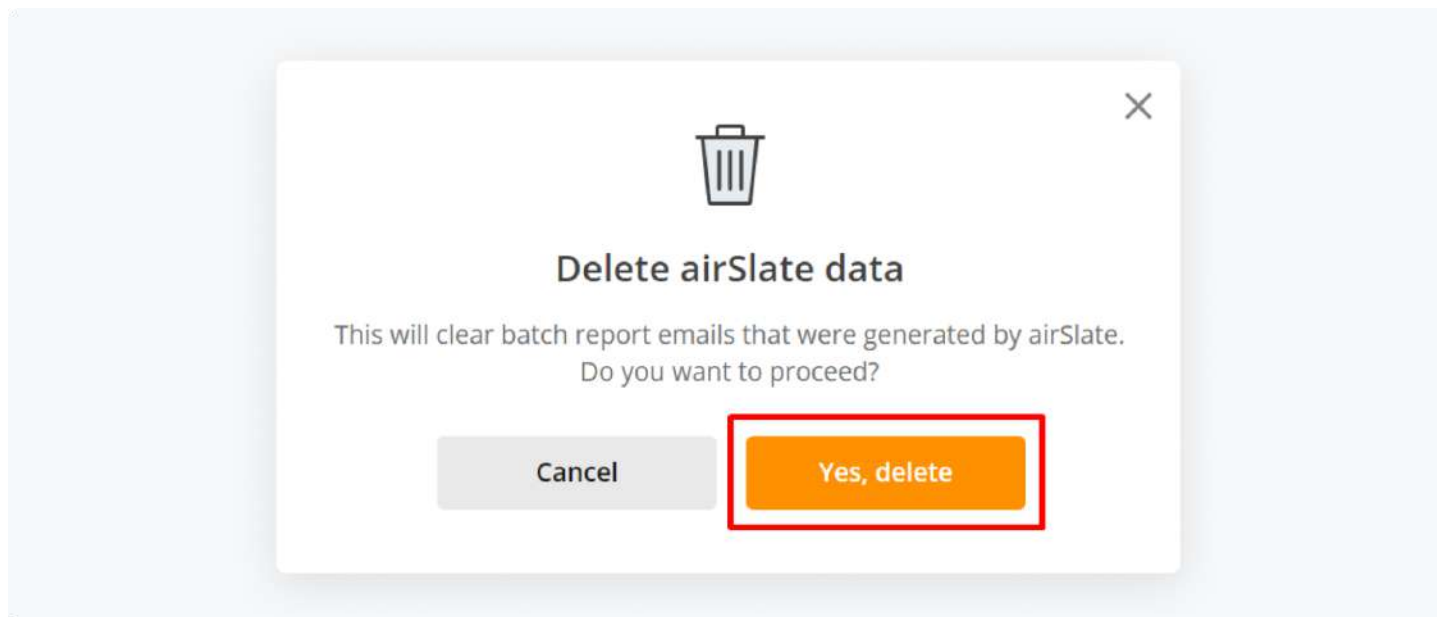
Settings

Clear your Salesforce email history which altaFlow uses for storing batch report emails or prepare your altaFlow app for uninstallation by removing settings such as permission sets and custom buttons in seconds.

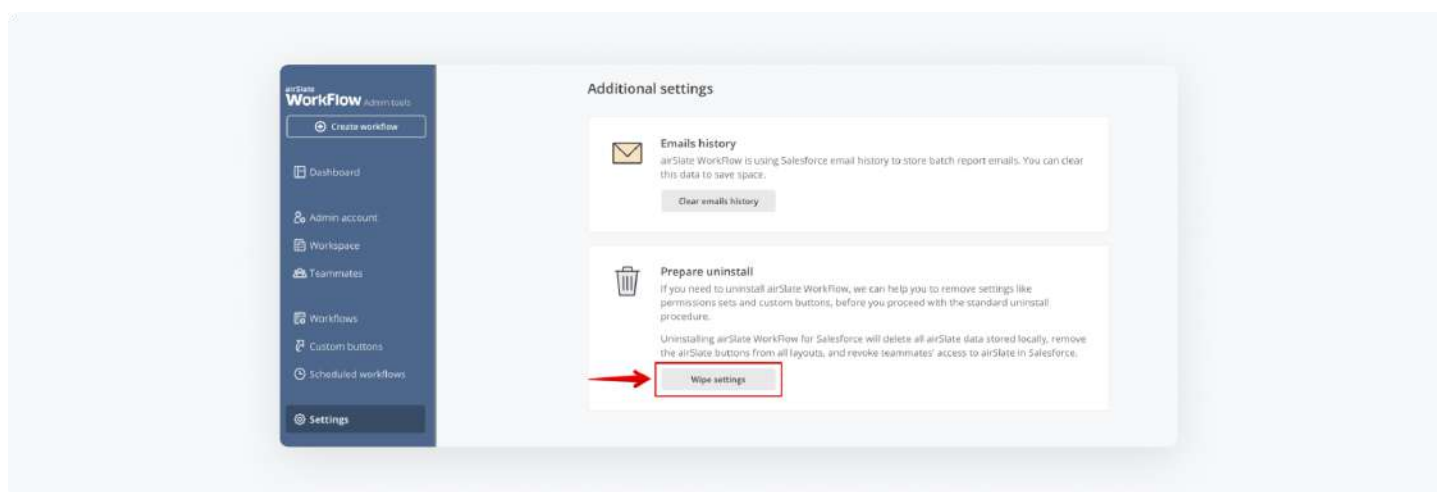
- altaFlow is using Salesforce email history to store batch report emails. To clear this data, select **Clear emails history**.



In the **Delete altaFlow data** pop-up, select **Yes, delete**.



- To uninstall an altaFlow app, select **Wipe settings** (for more information about uninstalling an app see the **Uninstall** section of this user guide).

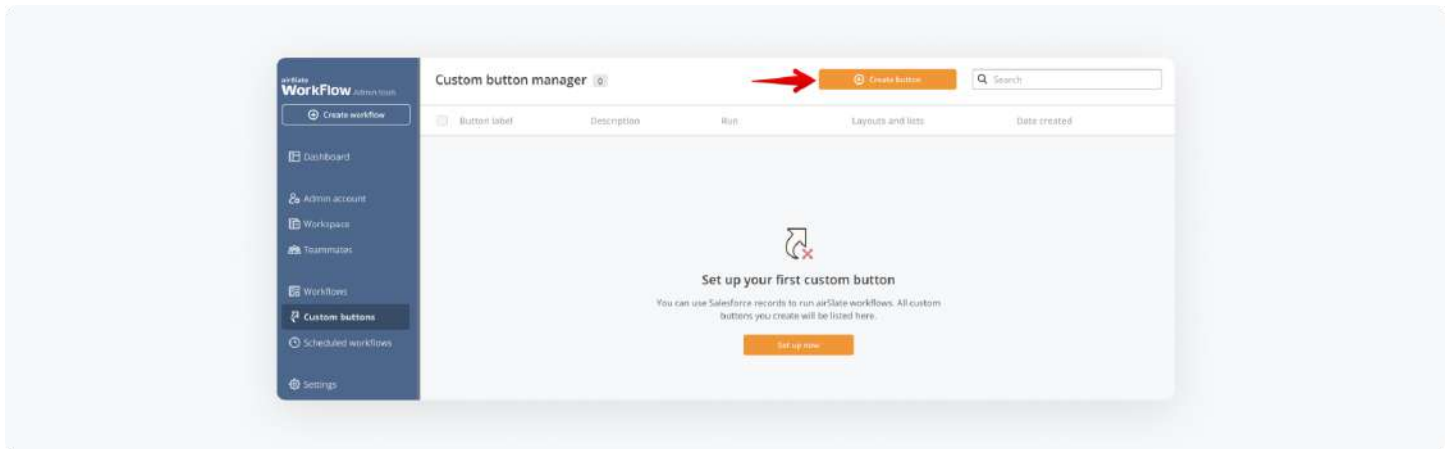


Send documents in bulk

Easily send documents to up to 75 Salesforce users all at once. Just add a custom button that connects a workflow to your List Views for standard and custom objects. Then, select Salesforce records and send your documents in a click.

How it works:

1. To send documents from multiple records, you'll need to create a custom button first. To do so, navigate to **altaFlow Admin Tools** in Salesforce. Then, switch to the **Custom button** tab and select **Create button**.



2. The **Custom button wizard** will open. In the **Button info** tab, enter a label for your button and a short description (will be entered automatically right after clicking the **Description** field).

Click **Next to action settings** to proceed.

Custom button info
Enter custom button label and description.

Custom button label will be visible to your teammates. Custom button description is only visible to Salesforce admins. You can use it to provide more information about what this button does.

1

Button label*
Send invoice

Description*
Send invoice

2

Cancel Next to action settings

3. In the **Action settings** tab, select **Run workflow**. Then, select the altaFlow workflow you'd like to use the button for. Next, select **Run workflow** as the custom button mode.



Note: If the mode is set to a value other than **Run workflow**, you will be unable to select the Salesforce object record lists.

Once finished, select **Next to layouts and lists** to proceed.

Action settings
You can configure different actions that will happen when your teammate clicks the custom button in Salesforce.

1. Run the connected workflow.
You can also specify if the first step of the workflow should be opened automatically.

2. Invoke selected Salesforce process.
Salesforce process, in turn, can be configured to run different workflows, depending on conditions.

3. Open airSlate Workflow app.
Use this option if you need to give your users the ability to select a workflow that they want to run from a Salesforce record.

1

Action
Run workflow Run Salesforce process Open airSlate app

2

Workflow*
Invoice

3

Mode
Run workflow

4

Back to button info Next to layouts and lists

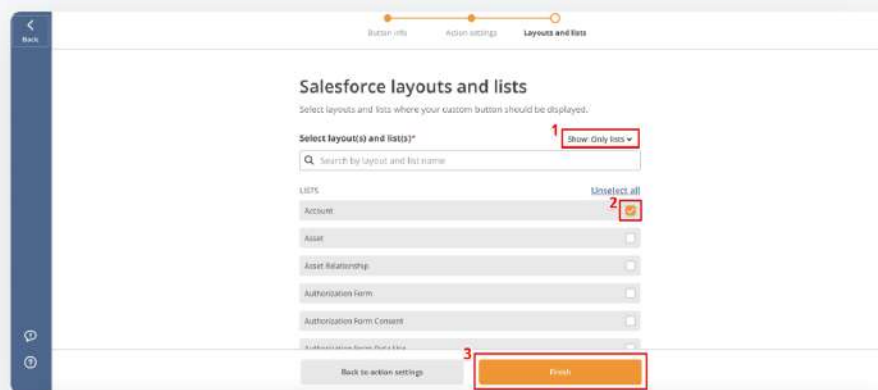
4. In the **Layouts and lists** tab, select the Salesforce object record lists that the custom button will be added to.



Note: Selecting any layout will add the custom button to each Salesforce record separately, while remaining unavailable for the list of records.

To view available lists for adding a custom button, select **Only lists** in the **Show layouts and lists** drop down menu.

Select the checkbox next to the needed lists. When done, click **Finish**.

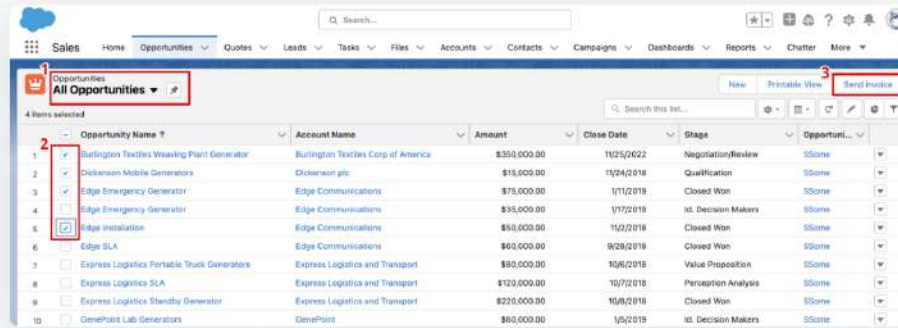


The custom button will be automatically added to the selected Salesforce object record lists. To use your custom button, navigate to the selected Salesforce object (**Opportunity** in the example). Switch the records list from **Recently Viewed** to **All**.



Note: Due to Salesforce limitations, the custom button won't be displayed for **Recently Viewed** or **Related** records.

Select the Salesforce records for the **List Views** you'd like to send your workflow to. Click the custom button (**Send invoice** in the example).



You will be notified via email once the documents have been sent successfully.

altaFlow app (workflows filtered by layouts and conditions)

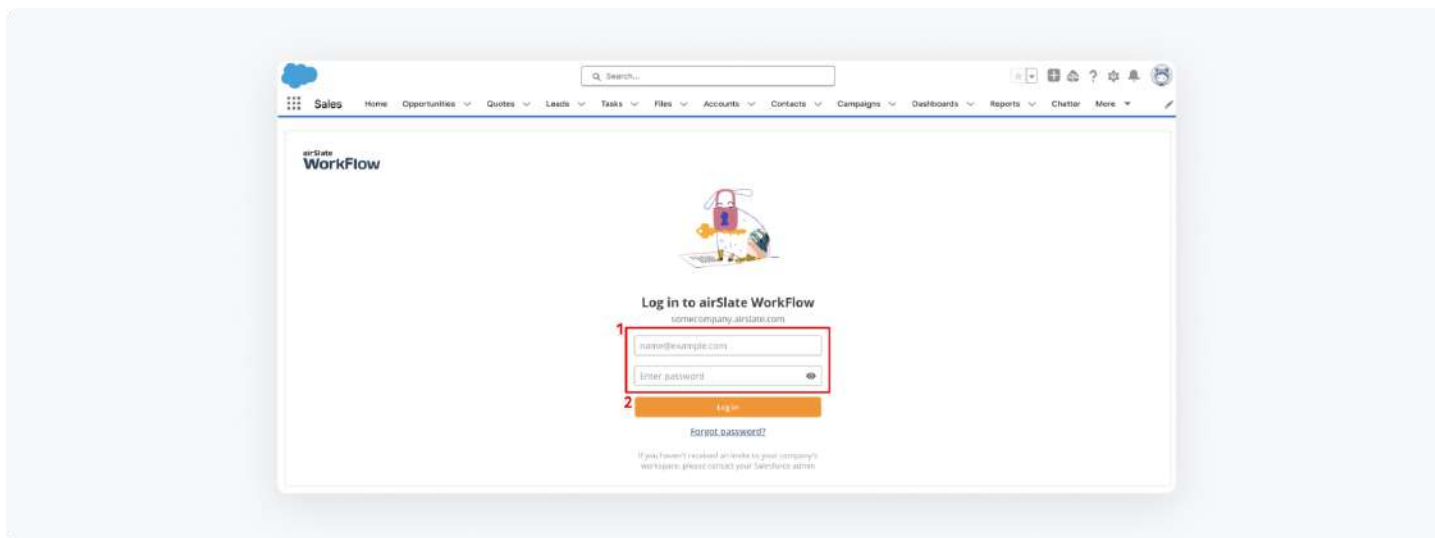
Get quick access to altaFlow workflows in your current workspace in seconds. Run the altaFlow workflows of your choice with a single click, no need to create a separate custom button for each workflow.

You can determine which workflows will be available for users in the **altaFlow** app by specifying layouts and conditions for each workflow in the **altaFlow** tab (altaFlow Admin Tools in Salesforce).

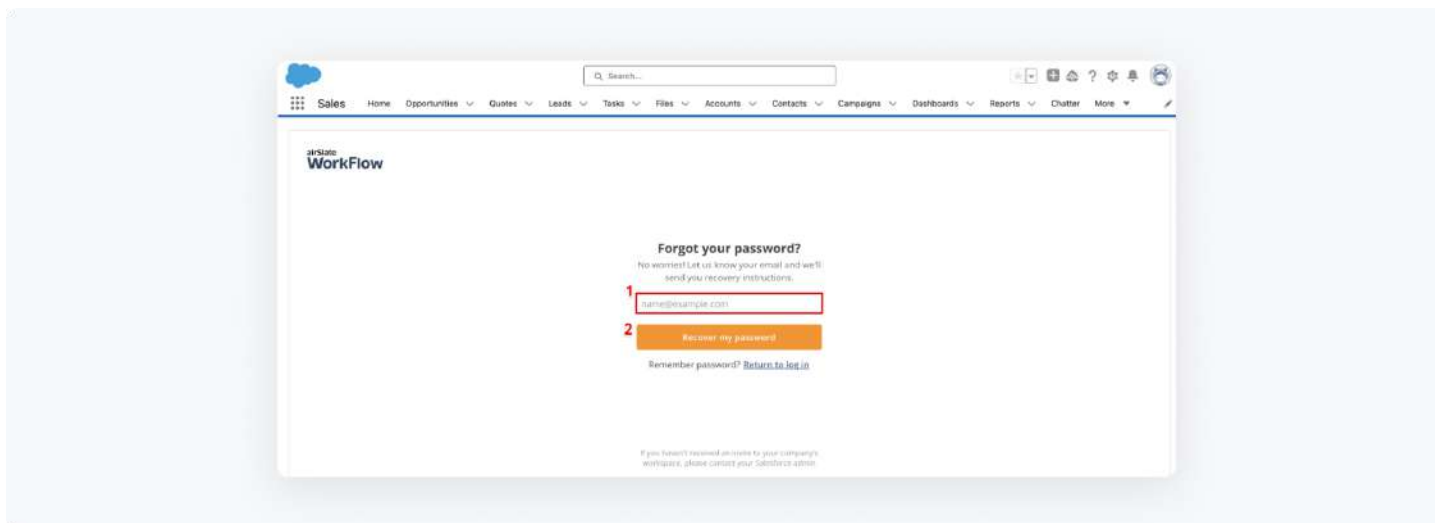
In your Salesforce record, select the custom button (previously created in the altaFlow Admin Tools in Salesforce) to access the **altaFlows** application.

Tip: To create a custom button for opening the Workflows app, see the **Creating custom buttons** subsection of this user guide.

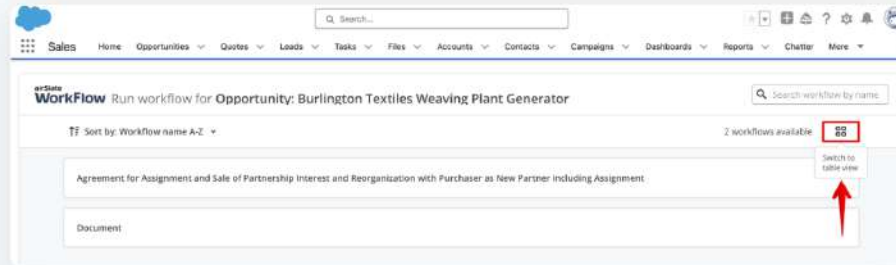
If you haven't yet logged in to the altaFlow app, enter your credentials and select **Log in**.



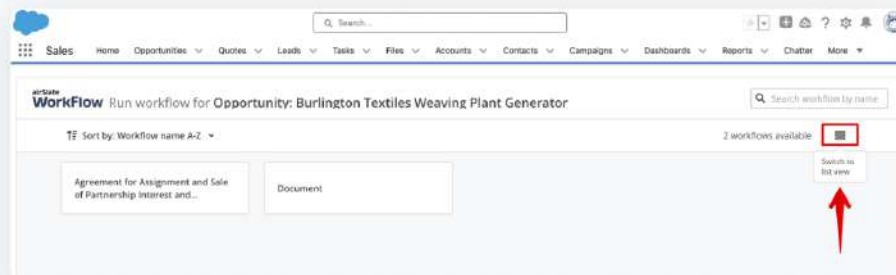
If you've forgotten your password, click **Forgot password** to recover it. Enter the email you'd like to receive password recovery instructions to. Then, click **Recover my password**.



Once logged in, the **altaFlow** app will open. The workflows created in your current altaFlow workspace will be displayed in the list view mode by default. To switch to the table mode, click the corresponding icon.



The workflows will then appear as follows:



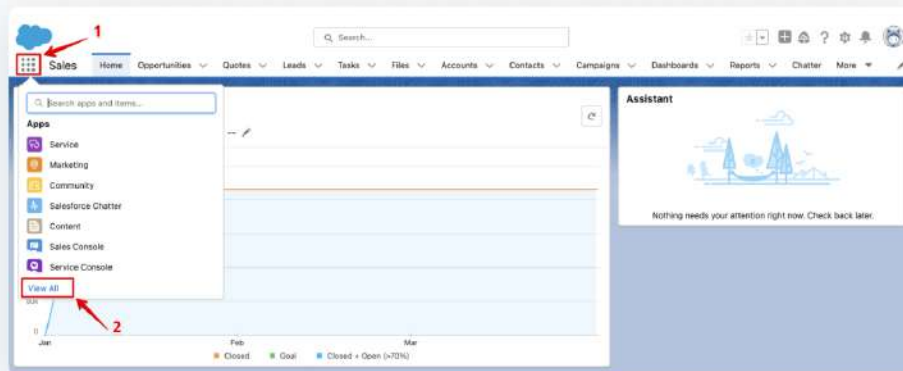
Use the quick find to search for your altaFlow workflows. Sort your workflows by name using the **Sort by** menu.

Click the workflow you need to start it. Once clicked, the document will be automatically created and opened in the editor.

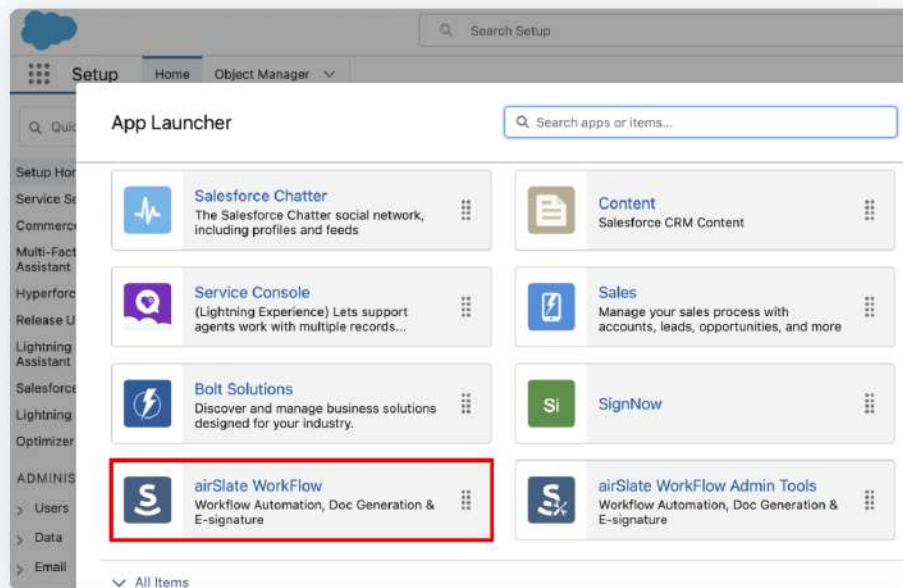
altaFlow Dashboard (recent documents created inside Salesforce)

The altaFlow Dashboard in Salesforce displays the documents created in your Salesforce organization using altaFlow. Depending on your altaFlow role, you will be able to see all documents (Workspace Owner or Supervisor) or only the documents you have access to (team member).

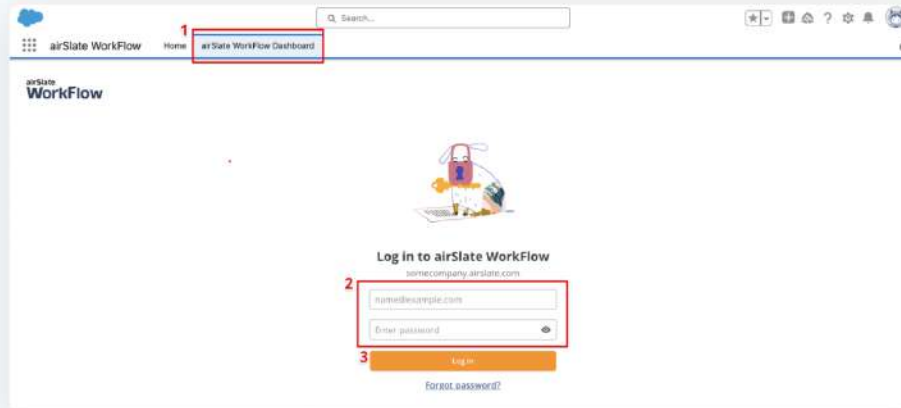
1. Go to the **App Launcher** and select **View All**.



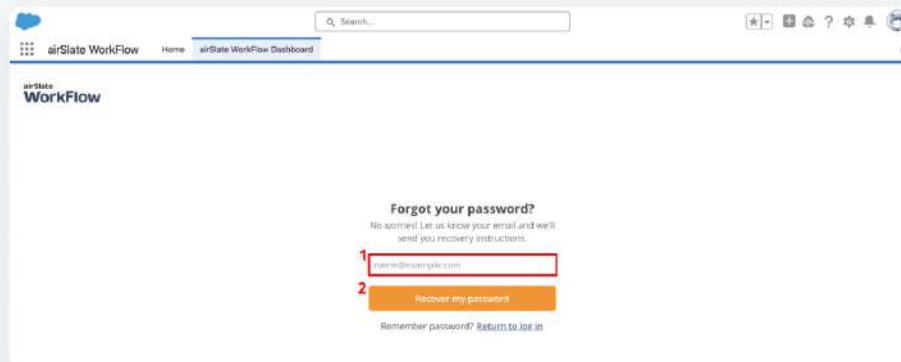
Then, select the **altaFlow** from the list of apps.



2. Switch to the **altaFlow Dashboard** tab. If you haven't yet logged in to the altaFlow app, enter your credentials, and select **Log in**.

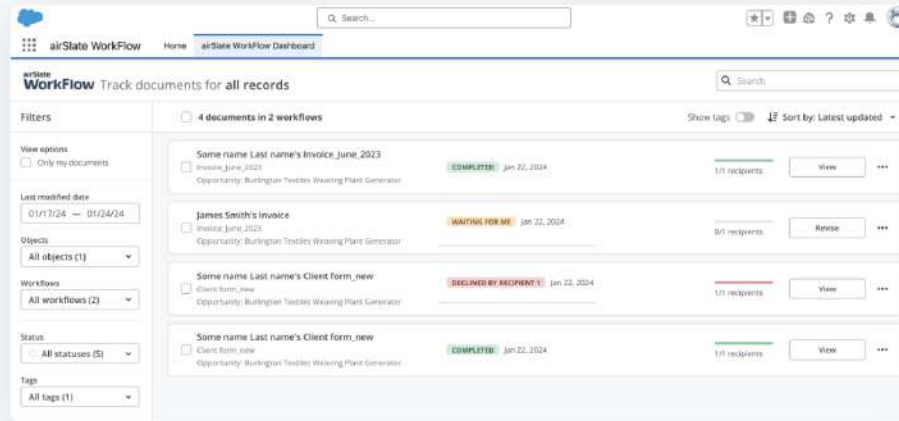


If you've forgotten your password, click **Forgot password** to recover it. Enter the email you'd like to receive password recovery instructions to. Then, click **Reset password**.



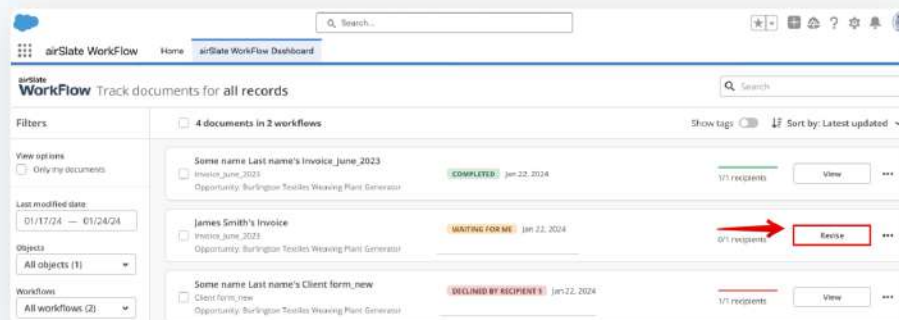
Once logged in, you can view a list of all documents you've created in Salesforce for the past 7 days (by default).

The **altaFlow Dashboard** tab will show the latest revision of each document, with a full breakdown of information.

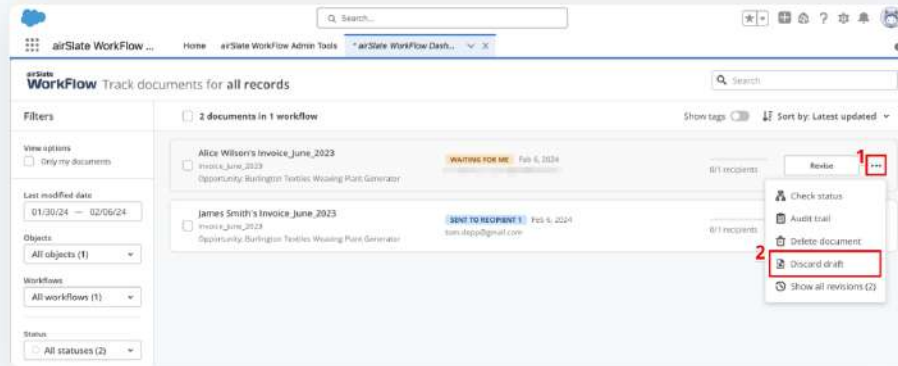


To create a new document revision, select **Revise**.

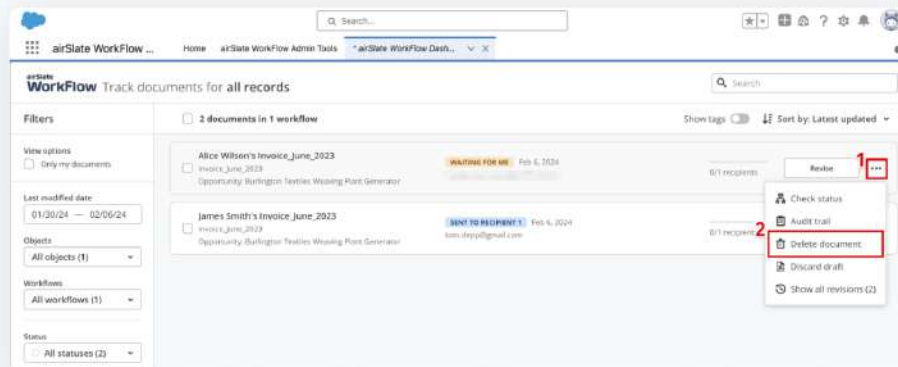
- If you are a workflow administrator, you'll be able to create new revisions of your workflows.
- If you are a Supervisor/Workspace owner, you'll be able to create new revisions of any workflow.



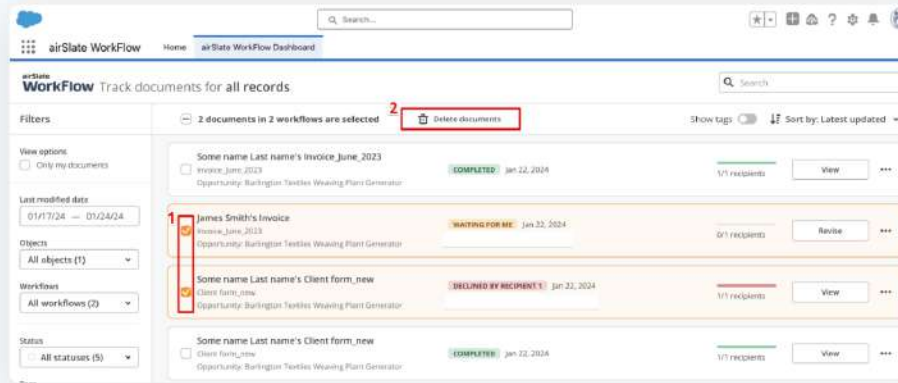
To delete a draft revision and create a new one, select the three dots next to it. Then, select **Discard draft**.



To delete a document from the Dashboard, click the three dots and select **Delete document**.

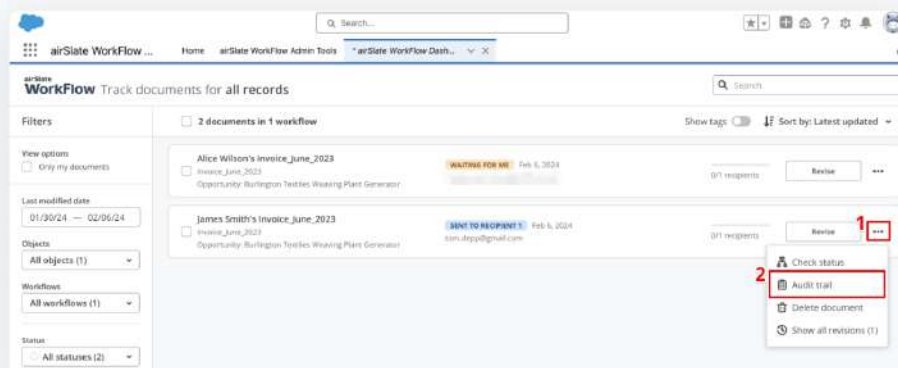


To delete multiple documents at once, select the documents you need. Then, click **Delete documents**.

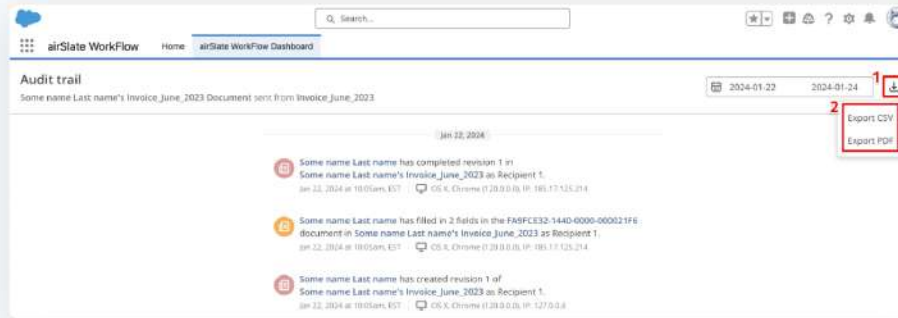


- If you are a workflow administrator, you'll be able to delete any documents in your workflow.
- If you are a Supervisor/Workspace owner, you'll be able to delete any documents in any workflows.

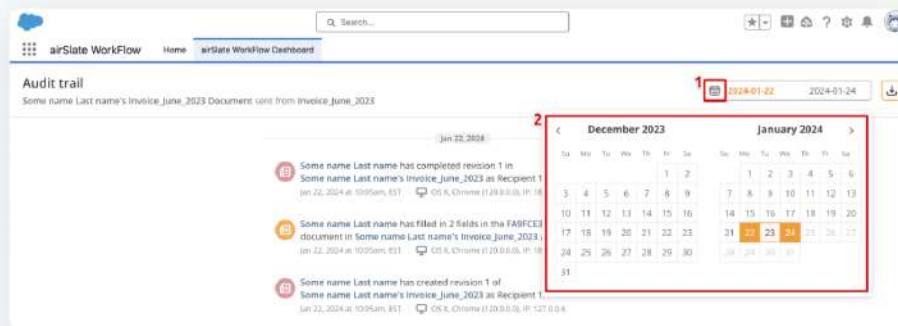
To track the document activity, click the three dots and select **Audit trail**.



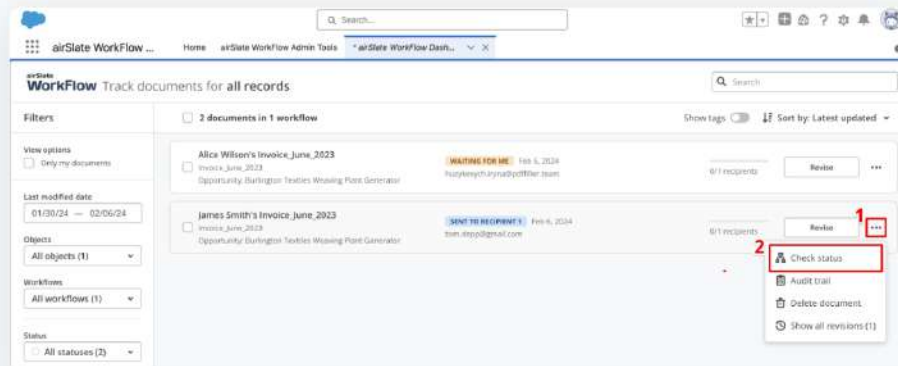
The new page will open displaying document activity and other details. It is also possible to download a PDF or CSV file with a complete listing of document activity. To do so, click the download icon. Then, select a file type for exporting the data.



You can also filter the document's activity details by date using a calendar.

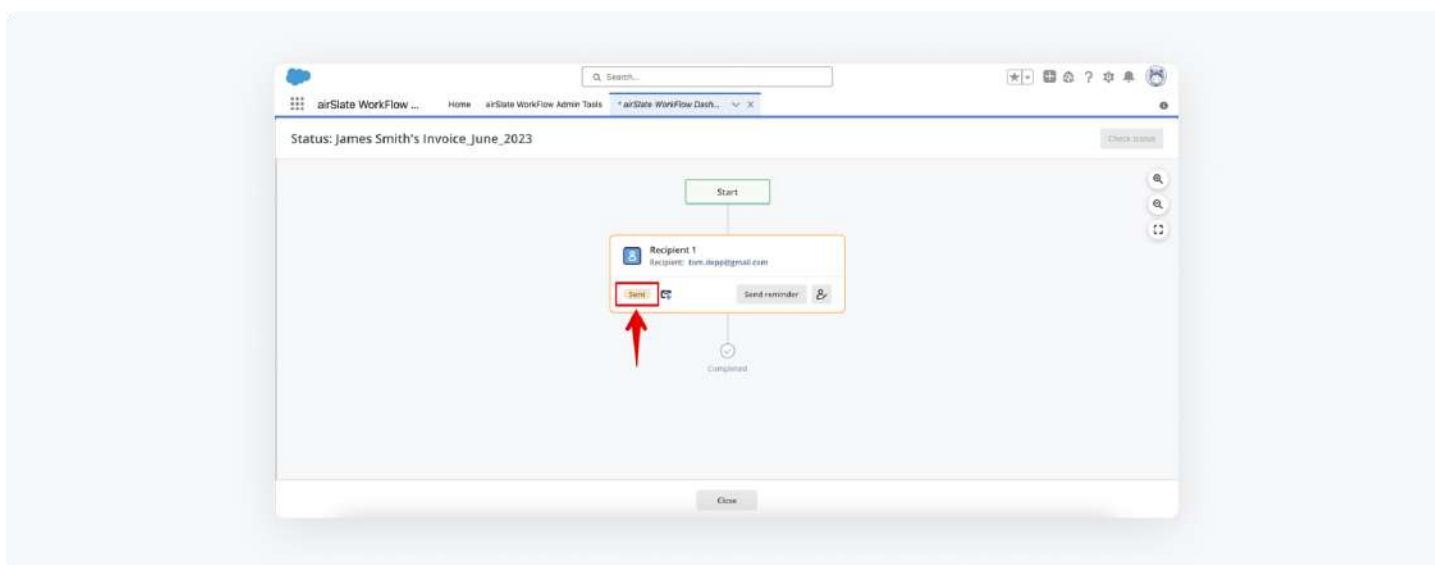


To check the current stage of the document, click the three dots. Then, select **Check status**.

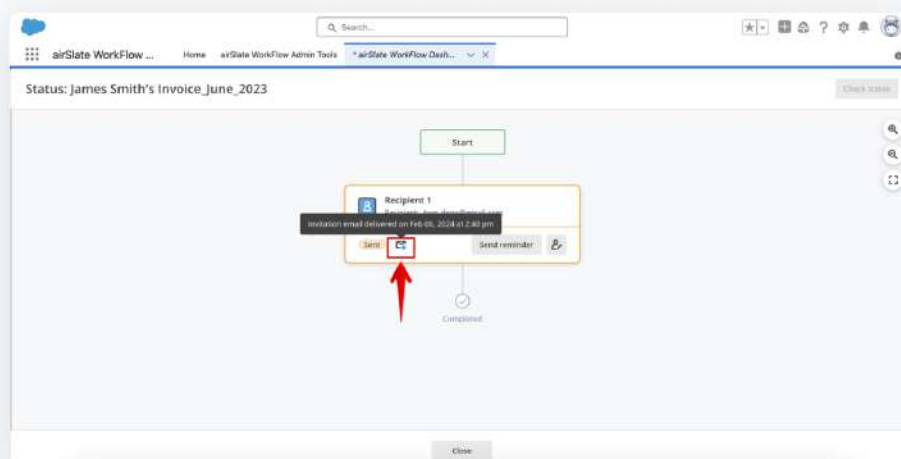


The **Status** page will open displaying the current document status:

- **Unassigned** (the recipient email address has not been specified)
- **In use** (the document has been saved as draft by a recipient)
- **Sent to** (workflow has been sent to the recipient email)
- **Waiting for me** (all documents that have been assigned to you)
- **Decline** (a recipient has declined to fill out the document)
- **Failed** (a workflow was configured incorrectly that has lead to the revision failure)
- **Completed** (documents have been completed by all steps in a workflow)



It is also possible view the time and date when the document was delivered by hovering over the email icon.



To change the document recipient, click the contact icon.



In the modal window that will open, specify the new recipient's email.

Change recipient and send documents

tom.depp@gmail.com will lose access to documents in this step. A new recipient will receive an invitation to fill out the documents.

Send invitation to email or SMS

✉

1

alice.wilson@gmail.com ✕

+ Data variables

Customize message

Subject: You're invited to complete the documents

Hi Recipient name ✕,

You're invited to fill out Template name ✕.

Cancel

2

Change

To filter documents by time period, Salesforce objects, or the altaFlow workflows they belong to. You can also filter documents by their status or tags.

airSlate WorkFlow

Home

airSlate WorkFlow Dashboard

Search...

airSlate WorkFlow

Track documents for all records

Search

Filters

View options

☐ Only my documents

Last modified date

01/17/24 — 01/24/24

Objects

All objects (1)

Workflows

All workflows (2)

Status

All statuses (3)

Tags

All tags (1)

4 documents in 2 workflows

Show tags

Sort by: Latest updated

Some name Last name's Invoice June, 2023

Invoice June, 2023

Opportunity: Burlington Textiles Weaving Plant Generator

COMPLETED Jan 22, 2024

1/1 recipients

View

...

James Smith's Invoice

Invoice June, 2023

Opportunity: Burlington Textiles Weaving Plant Generator

WAITING FOR ME Jan 22, 2024

huykynghynguyy@aliflow.com

0/1 recipients

Revise

...

Some name Last name's Client form_new

Client form_new

Opportunity: Burlington Textiles Weaving Plant Generator

DECLINED BY RECIPIENT Jan 22, 2024

huykynghynguyy@aliflow.com

1/1 recipients

View

...

Some name Last name's Client form_new

Client form_new

Opportunity: Burlington Textiles Weaving Plant Generator

COMPLETED Jan 22, 2024

1/1 recipients

View

...

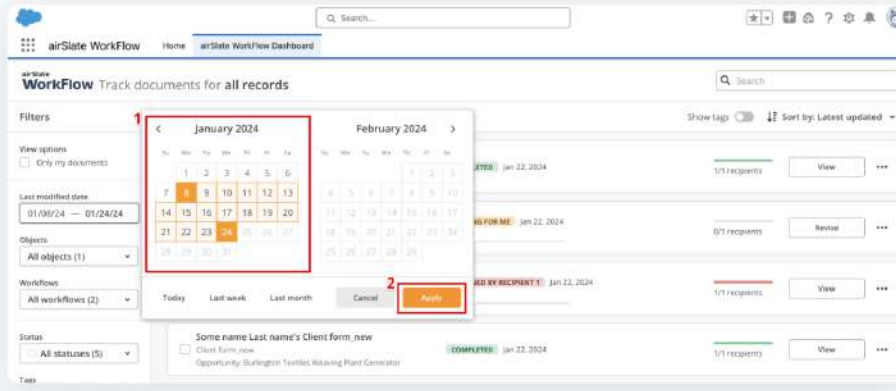
- To view document revisions for a specific time period, click the **Last modified date** field.

In the calendar, select the desired time period, then click **Apply**.

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It's also possible to select the current day as well as the previous week or previous month, beginning with the current date.

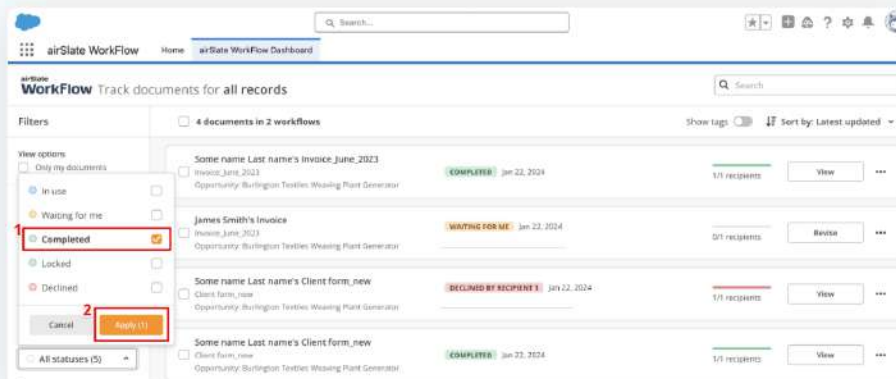


All document revisions created for a selected time period will instantly appear in the Dashboard.

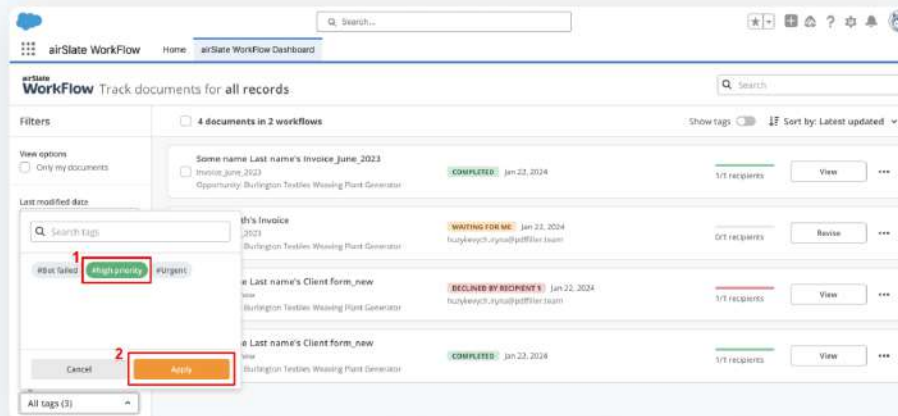
- To filter documents by their status, go to the **All statuses** list and select the criteria you want to filter by. Then, click **Apply**.



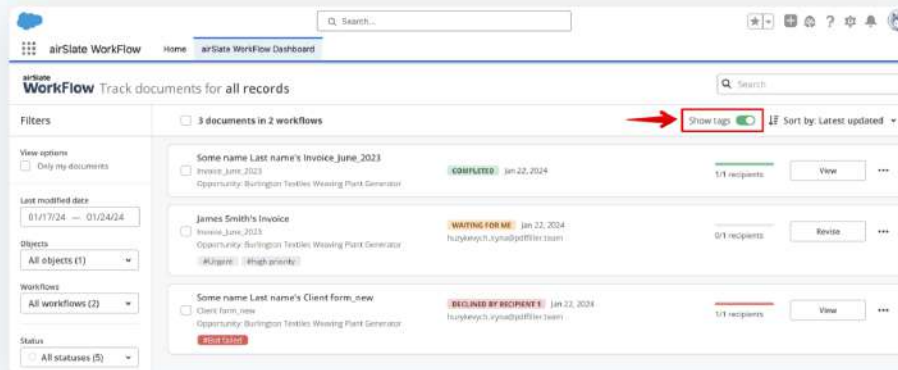
Note: Document statuses will be automatically added to a list once certain actions are performed with documents.



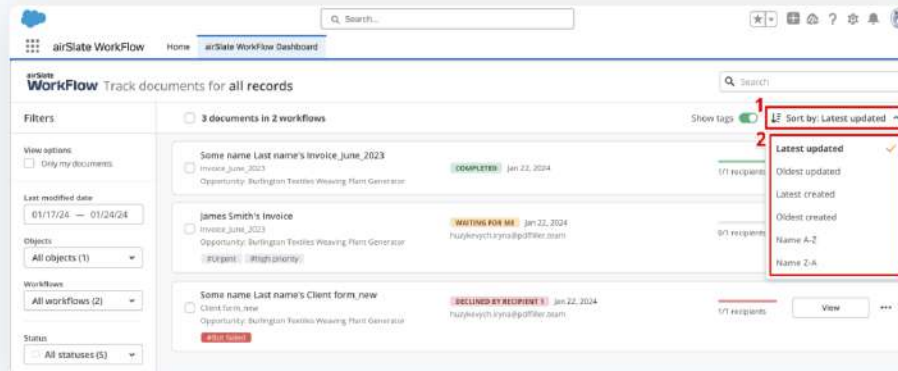
- To filter documents by their tags, go to the **All tags** list and select the one you need. Then, click **Apply**. Use the search line to locate the tag you need.



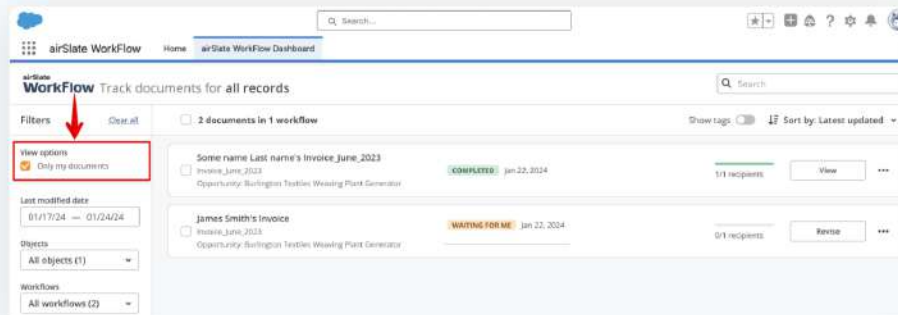
Tags are hidden by default. To enable the tags displaying next to documents, activate the **Show tags** toggle.



You can also sort documents by name, date of last update, or date of last creation.



Selecting the **Only my documents** checkbox will display documents created by you as well as documents assigned to you by other users.



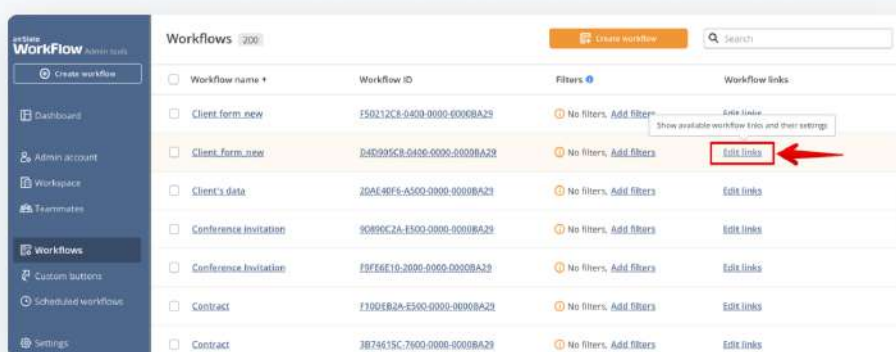
Configure altaFlow smart links

The smart link is tied to a specific Salesforce record so that it can be pre-filled with data from that record using the Pre-fill from Salesforce record bot. No need to configure a lookup for pre-filling documents - the system knows which Salesforce record to take data from. This link can also export data back to the record, using the Update Salesforce record bot.



Note: When setting up the Pre-fill bot to populate documents via a smart link, be sure to leave the default **Start from Salesforce** option selected in the **Select starting record** section.

To copy the link, navigate to the **altaFlow Admin Tools** and skip to the **Workflows** tab. Next, select **Edit links** next to the workflow you need to use a smart link for.



In the **Workflow links settings** modal window, enable the workflow links as they are disabled by default. Then, copy the smart link by clicking it.

Workflow links settings

Workflow links 1 ☒ **Disable shareable links**

Shareable links
Your workflow can be accessible via shareable link. Link will be different for every workflow role. Copy the link for a role which you would like to distribute.

Recipient 1:

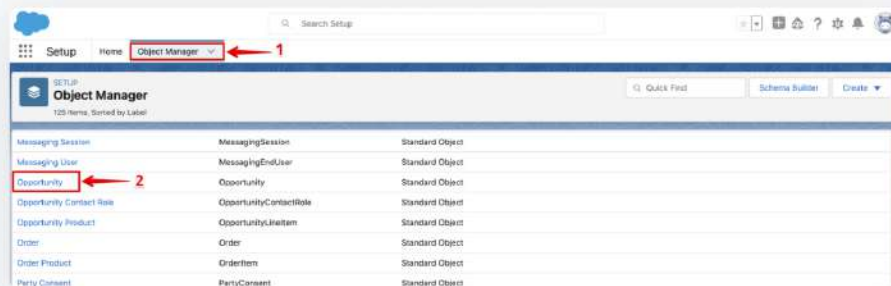
Smart links
Copy this formula into the formula field on the record. When the Pre-fill from Salesforce records bot is configured on the workflow, the link generated from the record will be pre-filled with the record data. Copy Recipient 1 smart link to clipboard

Recipient 1: 2

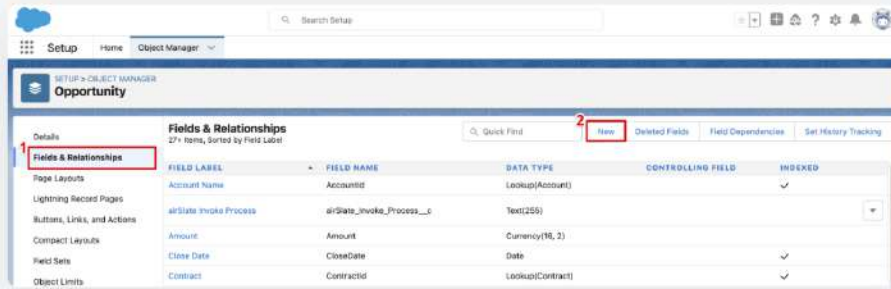
Done

👉 The **smart link's URL** will then be stored in the Salesforce object's **formula field**.

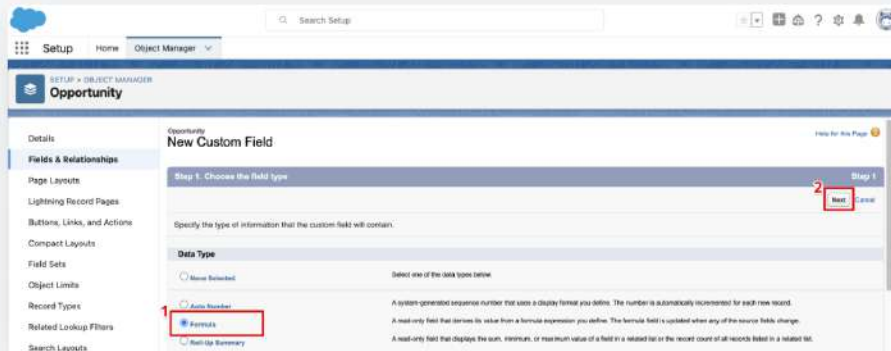
To create a formula field, navigate to the Salesforce **Object Manager**. Then, select the object you need.



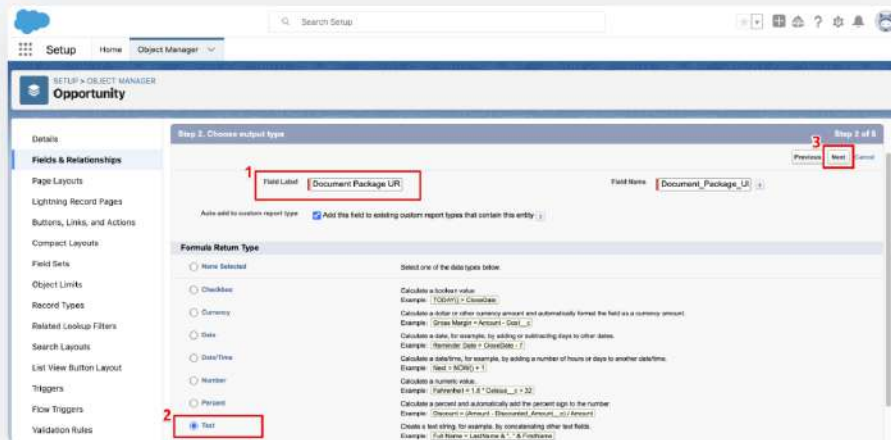
Once selected, in the **Fields & Relationship** section, select **New**.



For the data type, select **Formula**. Then, click **Next**.

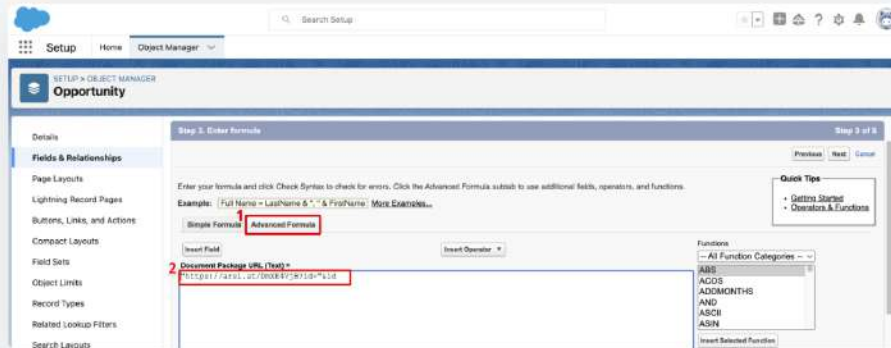


Enter the label for your formula field. The field name will be entered automatically when you click on it.
For the formula return type, select **Text**.



Switch to the **Advanced Formula** tab. Then, paste the smart link URL.

Finish setting up the field and save your settings.



That's it! You can now copy a smart link from the specified Salesforce object's record (where you've added it) and share it with your customers.

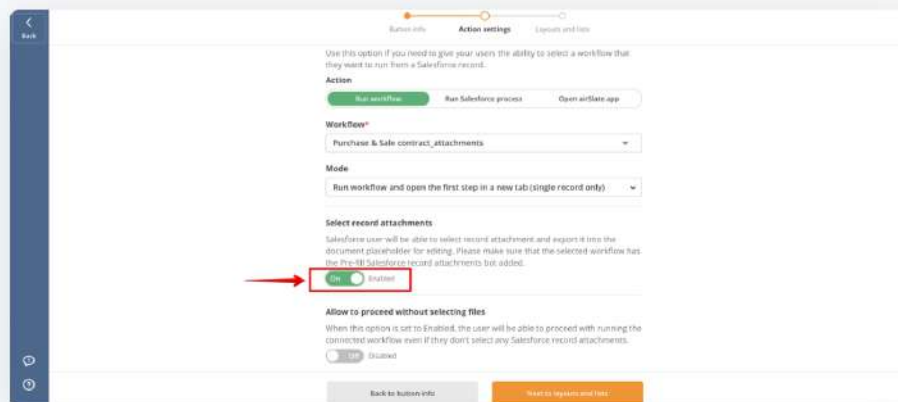
Add Salesforce attachments/files in altaFlow workflows

Import attachments/files from Salesforce into your workflows using the custom buttons. Edit attachments/files and then export them back to Salesforce. Before you start, make sure your workflow meets the following requirements:

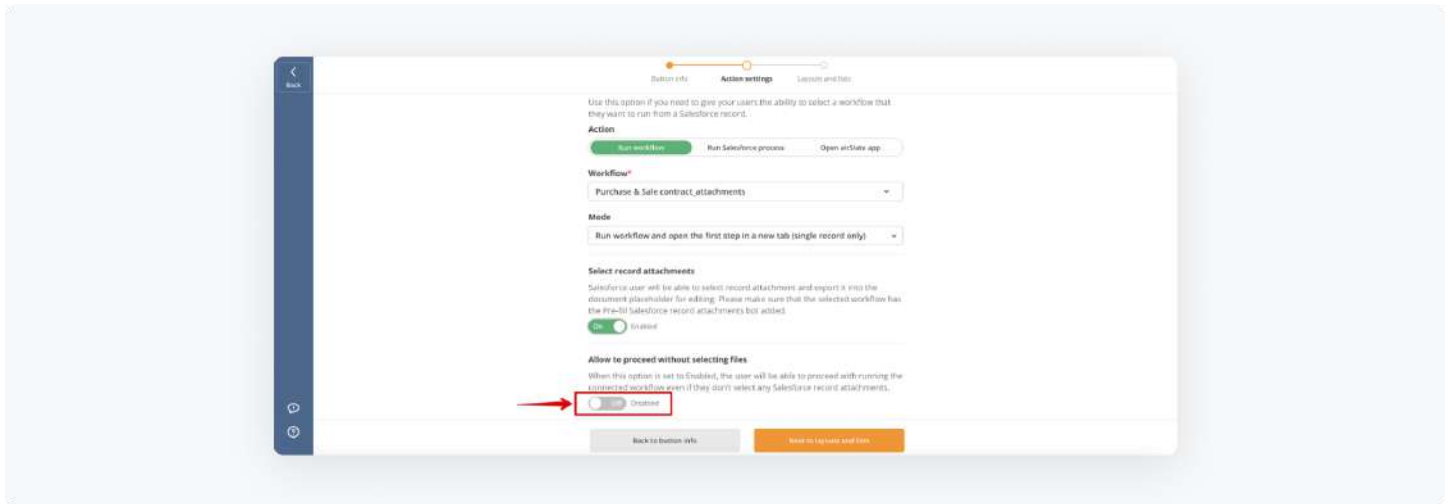
- ★ contains the **Document placeholder**
- ★ the **Pre-fill Salesforce record attachments** bot has been configured (for pre-filling Salesforce files into document placeholder)
- ★ the **Export to Salesforce** bot has been configured

To allow users to edit attachments/files imported from Salesforce, you need to configure the **Enable editing features** bot (see the **Assign the editing permissions (Annotation Panel)** section of the Document Placeholder user guide in the altaFlow Help Center) as well.

Now let's proceed to creating a custom button. Once you've selected the workflow you need, the **Select record attachment** toggle will appear (disabled by default). Enable the toggle.



Once enabled, decide whether adding attachments will be mandatory for users to proceed with running your workflow. To do so, leave the toggle disabled. Enabling the toggle will allow users to skip this step and continue running your workflow without selecting any files.



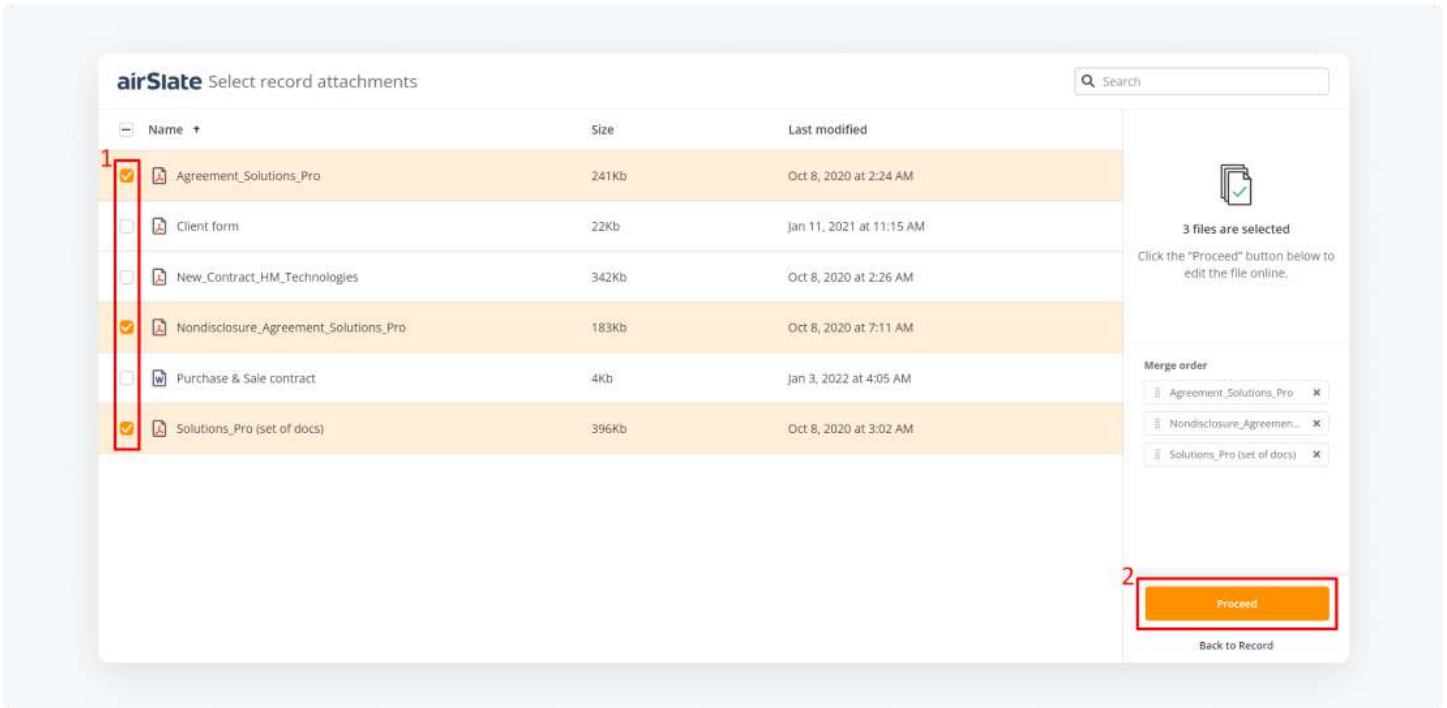
Finish creating your custom button.

After users select the custom button you've created, the list of Salesforce attachments/files will appear. They will be able to choose multiple PDF/DOCX/XLSX attachments to import via the Document Placeholder.

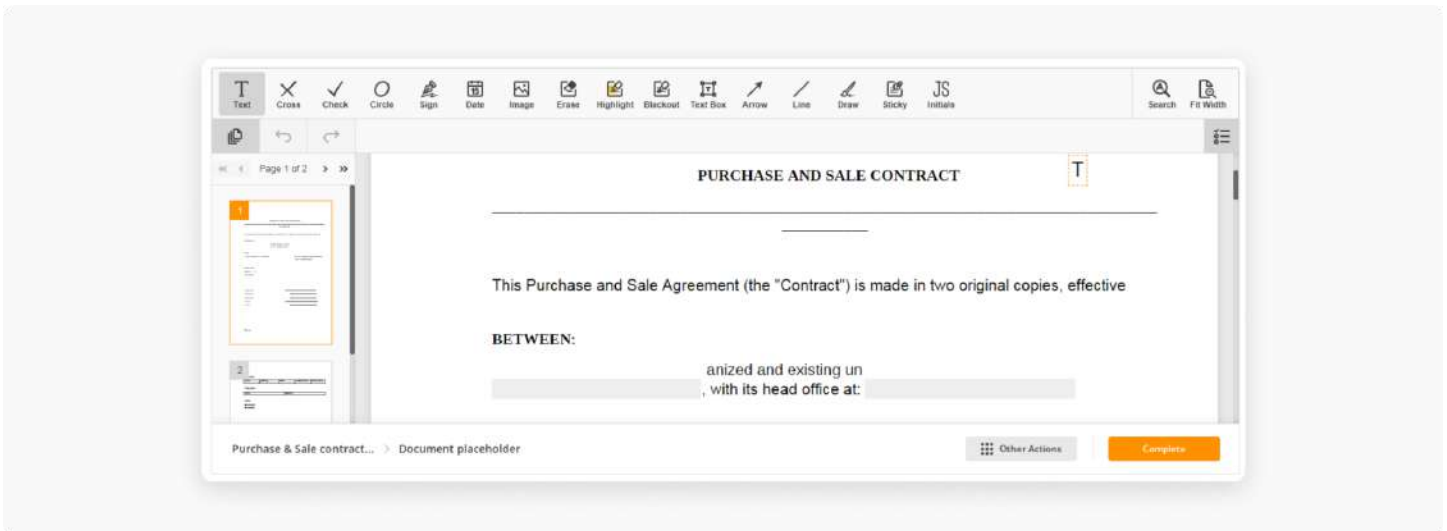


Note: if the option to skip selecting files has been enabled, the Proceed button will be active for users even if no files are selected.

The selected attachments will then be merged into a single document. Users will be able to set the merge order if needed prior to proceeding.



The selected attachments will be imported via the Document placeholder and instantly open in the PDF editor as a single document.



Once finished, click **Complete**. The document will be instantly exported to the selected Salesforce record as an attachment/file.

altaFlow Lightning sidebar component

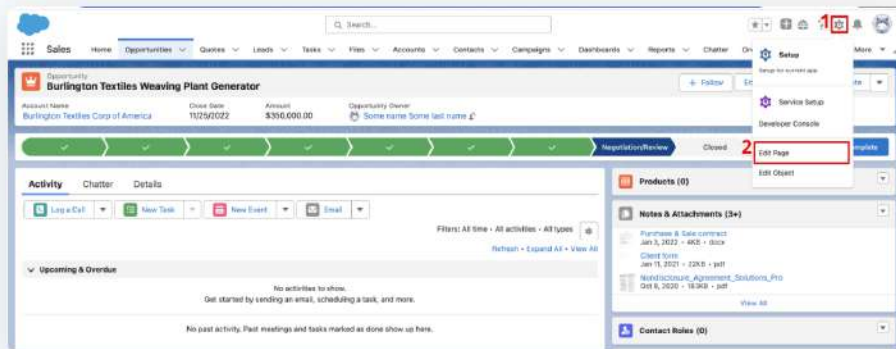
Use the altaFlow Lightning component to directly access a list of all altaFlow documents created from Salesforce . Easily track when your documents were completed by teammates.

How to add

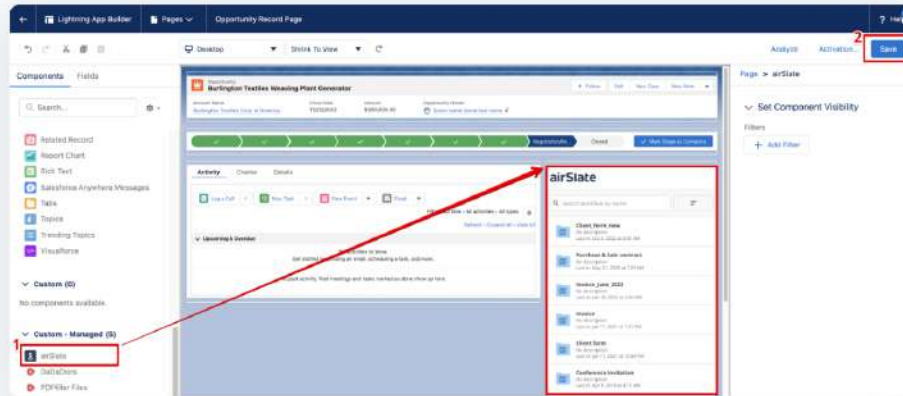
Go to the record page where you need to add the altaFlow Lightning sidebar component and click the gear icon. Then, select **Edit Page**.



Note: this action can only be implemented by the administrator of the Salesforce organization.



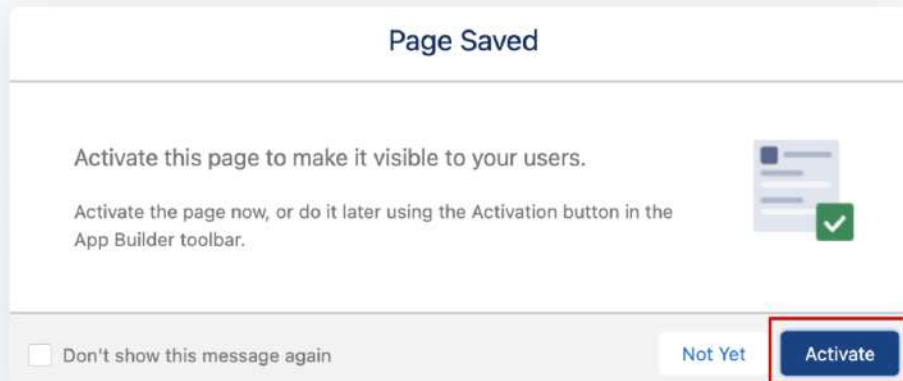
Scroll down the list of **Lightning Components** and select the altaFlow component. Drag and drop it directly on your record page. Once done, click **Save**.



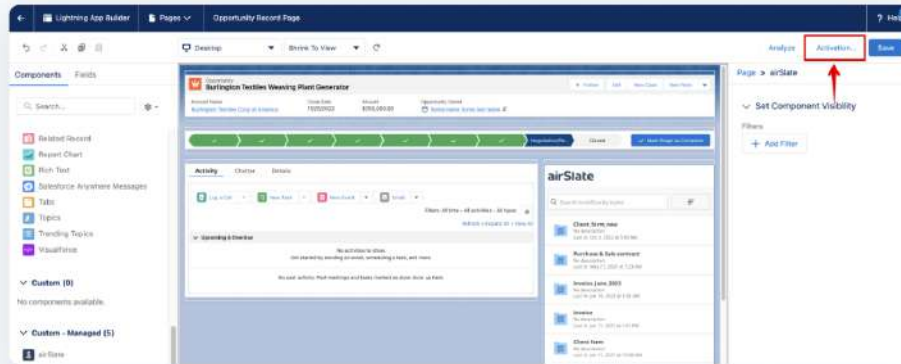
In the **Page Saved** modal window, click **Activate** to make the Lightning component visible to users.



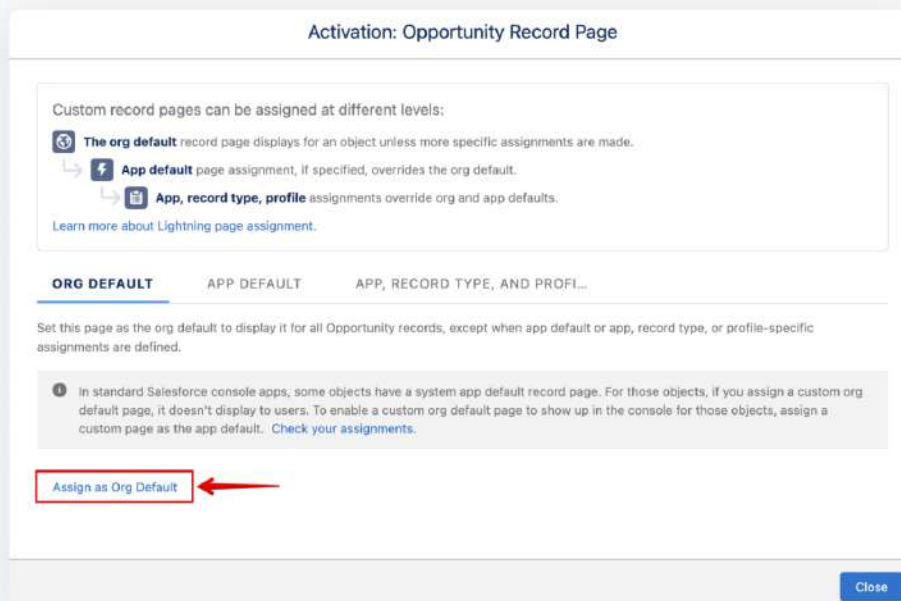
Note: the **Page Saved** modal window is displayed when installing the Lightning component to a record for the first time.



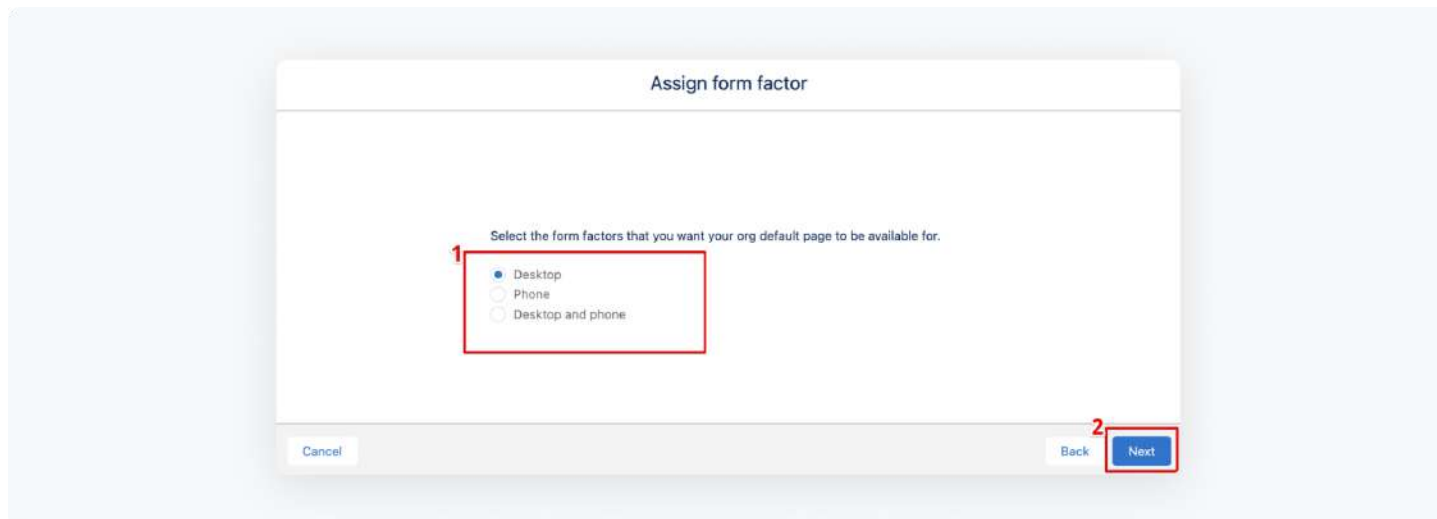
If you are reinstalling the Lightning component, you can activate it by selecting **Activation**.



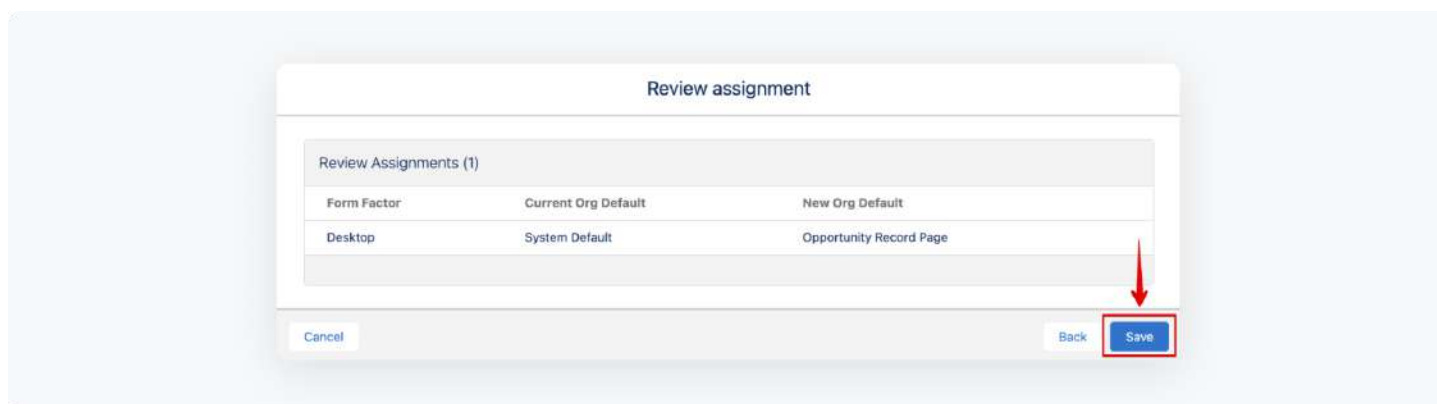
In the **Activation** pop-up, select **Assign as Org Default** to make the component accessible from every record in your organization.



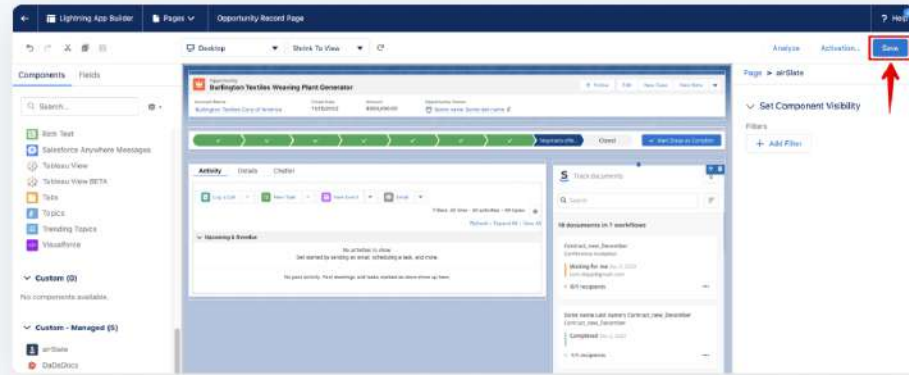
In the **Assign form factor** modal window, select the form factors that you want your org default page to be available for (**Desktop** in the current example). Then, click **Next** to proceed.



Next, in the **Review assignment** modal window, confirm your setting by clicking **Save**.



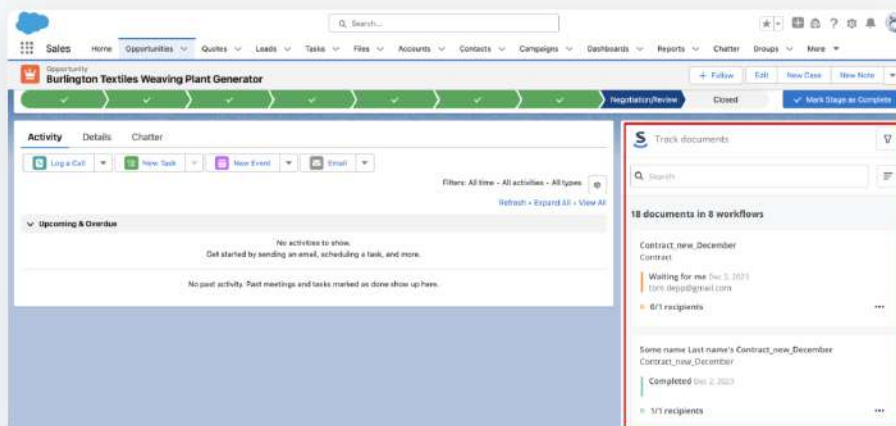
Click **Save** to save your assignment settings. Once done, you can go back to your record page.



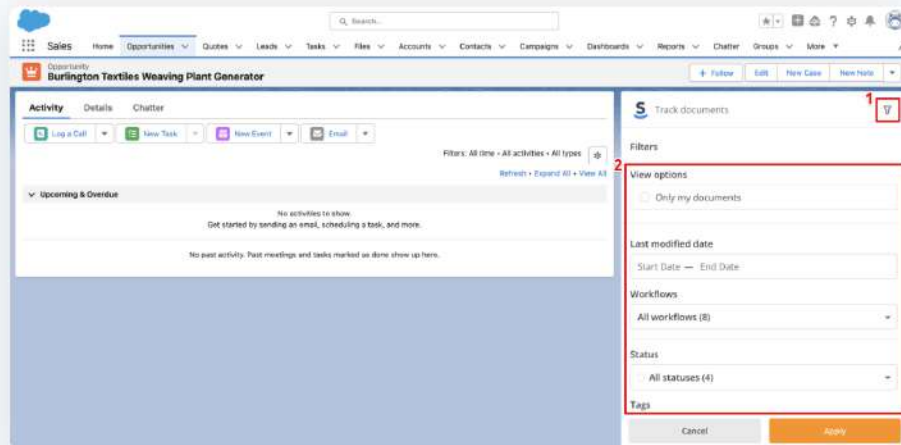
Now the altaFlow Lightning component will be located right where you added it on your record page. Use it to instantly access and track altaFlow documents created from Salesforce.

How to use

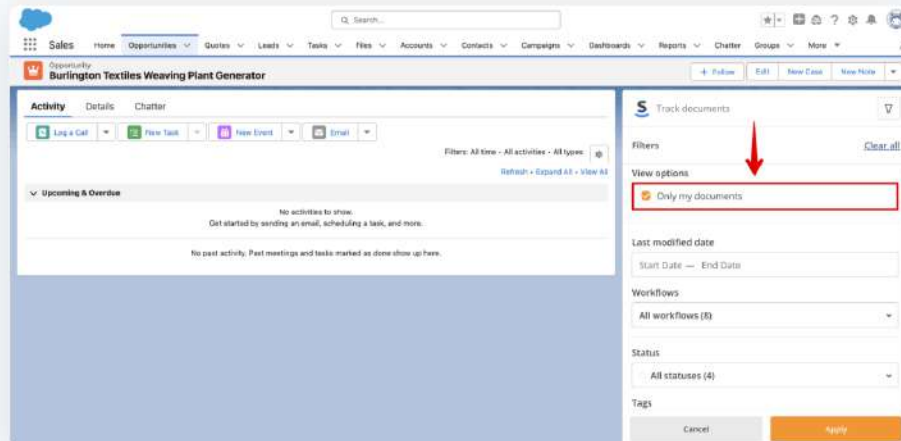
Easily track the completion of documents by your users and view every document revision with the altaFlow Lightning sidebar component. Sort documents by order, name, and last revision date to easily locate them.



Adjust the way your documents are displayed in the Lightning component by filtering them.

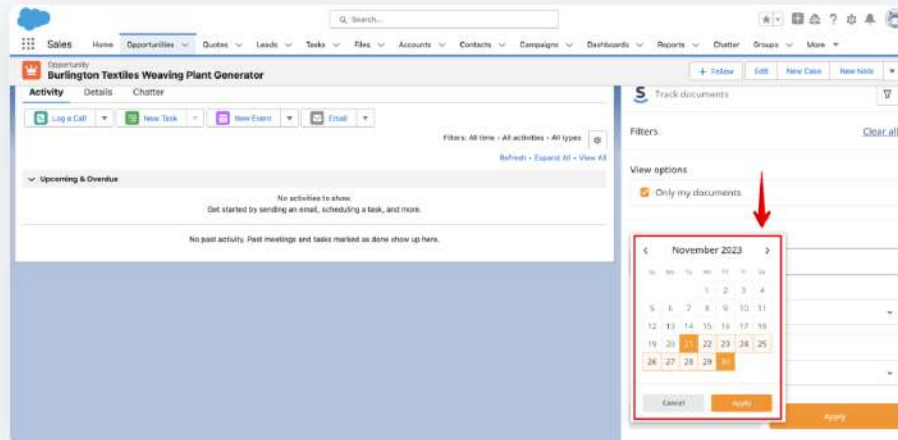


Selecting the **Only my documents** checkbox will display documents created by you as well as documents assigned to you by other users.



To view documents for a specific time period, click the **Last modified date** field. In the calendar, select the desired time period, then click **Apply**.

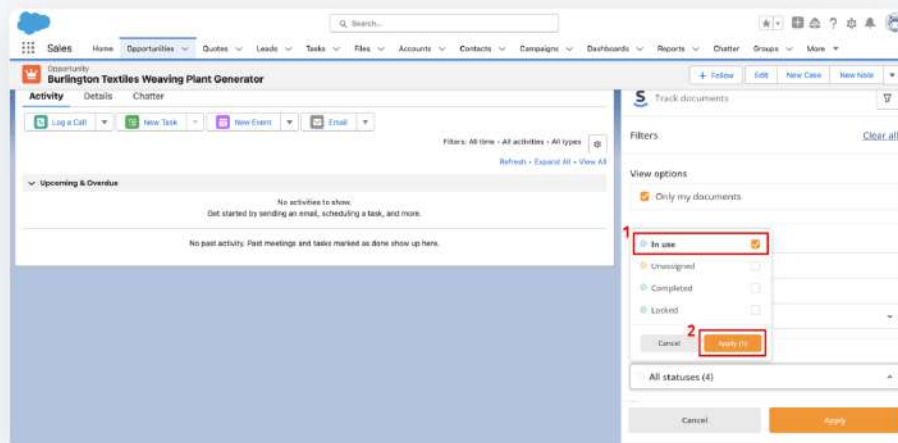
All document revisions created for a selected time period will instantly appear.



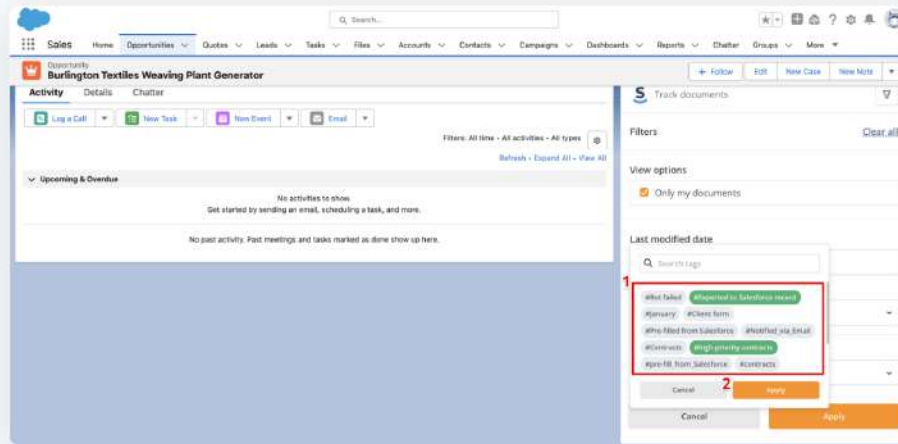
To filter documents by their status, select the criteria you want to filter them by. Then, click **Apply**.



Note: Document statuses will be automatically added to a list once certain actions are performed with documents.

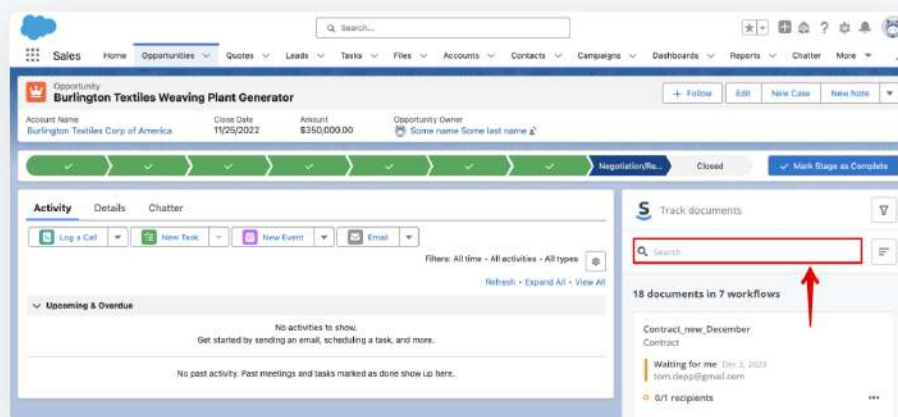


To filter documents by their tags, select the one you need. Then, click **Apply**.

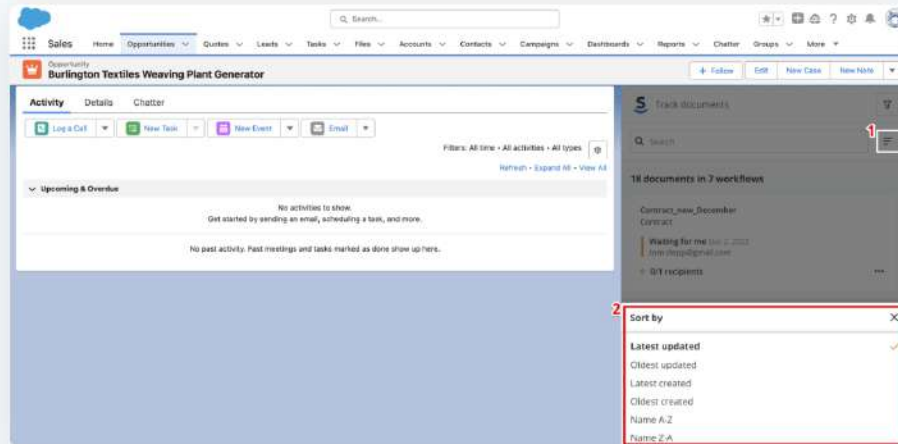


Once you've set up the filtering criteria, select **Apply**.

To find a specific document in the workflow list, type the first letter of its name in the search line.

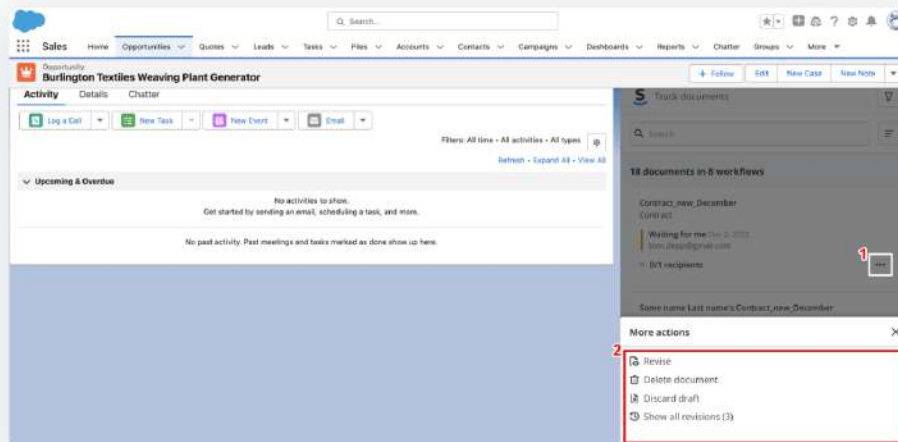


Select the **Sort by** dropdown menu to define the display order for your documents in the list. Sort them by name, date of creation, or last updated.



Click the three dots menu next to the document to:

- create a new document revision (click **Revise**)
- view the latest document revision (click **View**)
- delete the current document (click **Delete**)
- view a list of every revision for a document (click **Show all revisions**)
- discard draft to create a new revision



- If you are a workflow administrator, you'll be able to create new revisions for any document or delete any documents in your workflow.
- If you are a Supervisor/Workspace owner, you'll be able to create new revisions for any document or delete any documents in any workflow.

altaFlow bots for Salesforce

Easily design altaFlow workflows and collaborate on documents with your teammates and colleagues. Just configure the bot you need and create new or update existing Salesforce records, pre-fill your documents with Salesforce record data and more in seconds.

The following altaFlow bots for Salesforce are available for use:

- **Create Salesforce Record bot** (activates when a document is completed / creates a Salesforce record from a completed document)



Note: If records that contain mapped fields in the bot already exist and have the exact same values as in the bot, the Create Salesforce record bot **will be unable** to create duplicate records.

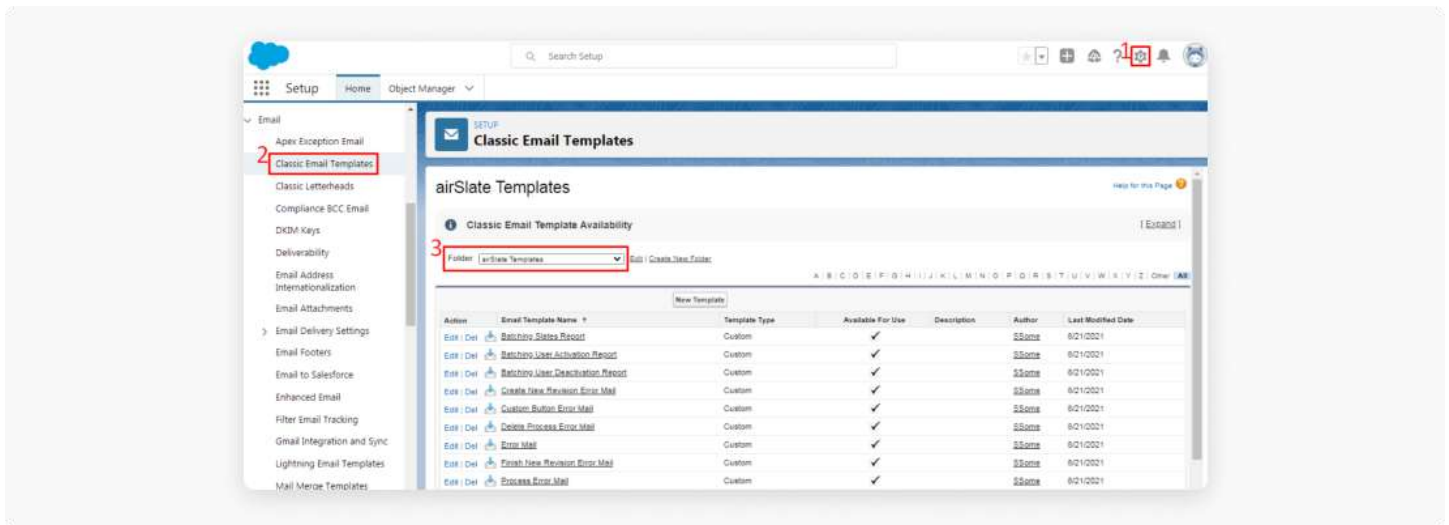
- **Export to Salesforce** (activates when a document is completed / uploads documents to the record inside Salesforce)
- **Invoke Salesforce process on documents opening** (starts a Salesforce process when a recipient opens the documents)
- **Invoke Salesforce process on documents completion** (invokes a Salesforce process after a document has been completed)
- **Notify Salesforce contacts on documents opening** (sends an email to Salesforce contacts / activates when a document is opened)
- **Notify Salesforce contacts on documents completion** (sends an email to Salesforce contacts / activates when a document is completed)

- **Pre-fill from Salesforce record bot** (activates when a document is created or opened / pre-fills a document with data from a Salesforce record)
- **Pre-fill from Salesforce records with SOQL** (activates when a document is created or opened / pre-fills a document from a Salesforce record)
- **Pre-fill Salesforce record attachments** (pre-fills Salesforce files into document placeholder / activates when the recipient opens the document)
- **Update Salesforce record** (activates when a document is completed / updates a Salesforce record from a completed document)
- **Update Salesforce record via SOQL** (activates when a document is completed / updates multiple Salesforce records using SOQL query)

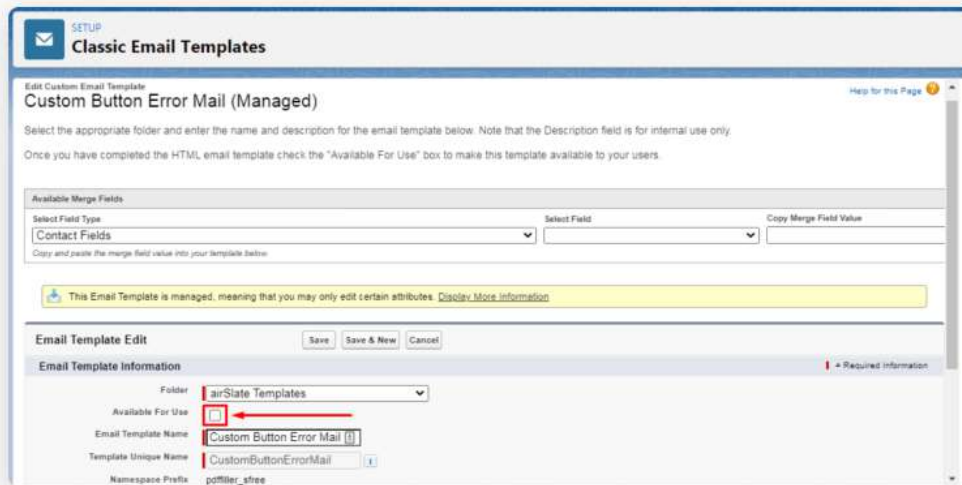
Switching off altaFlow email notifications

Salesforce administrators can switch off email notifications for all users that altaFlow for Salesforce sends by default. Refer to the instructions below:

1. Go to **Setup** and search for **Classic Email Templates**. Then, for **Folder** select **altaFlow Templates**.



2. Select **Edit** next to the email template to switch off the corresponding notifications. Then, in the **Email Template Information** section, uncheck the **Available For Use** checkbox.



Once finished, save your settings.

Insert Salesforce files into documents generated from DOCX templates

Insert PDF, DOCX, PNG, JPEG, TXT, or RTF files from Salesforce records into your documents generated from DOCX templates. Use a specific tag in your DOCX templates so that when a document is created, this tag will insert a file as an image in the body of a document.

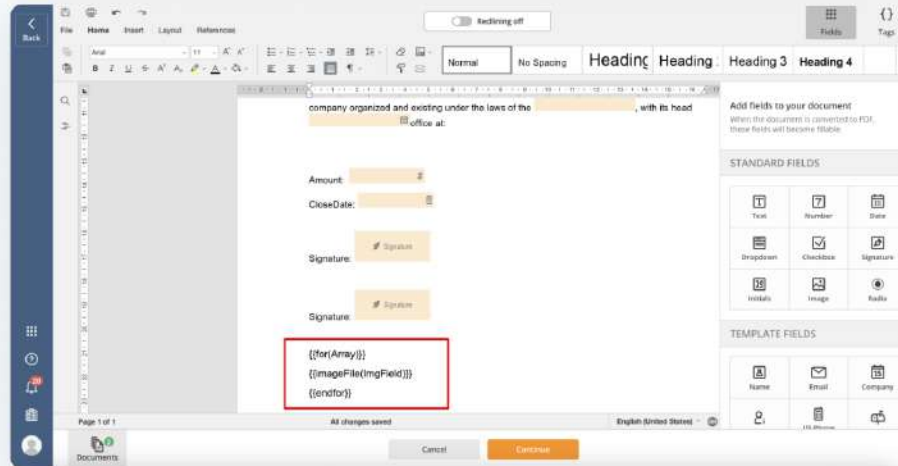
Let's take a look at how to set this up:

1. Open your DOCX template for editing by clicking **Edit**.

Then, add syntax for inserting images wherever you need in a DOCX template:

To do so, add the **imageFile(ImgField)** function inside the for tag - where **ImgField** is a variable name that can be changed.

Save your changes by clicking **Continue**.



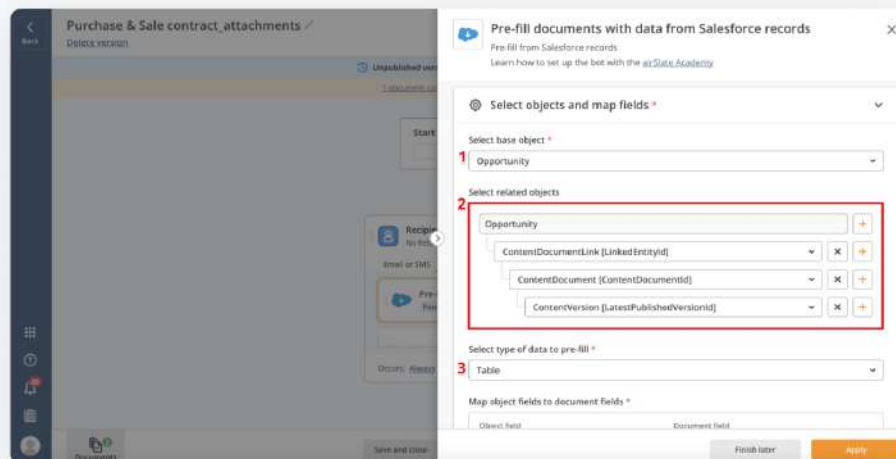
2. Add the **Pre-fill from Salesforce record** bot to your workflow.

In the bot settings, select a base object (**Opportunity** in the example).

Then, select related (child) objects of the base object in the following order:

ContentDocumentLink [LinkedEntityId] → ContentDocument [ContentDocumentId] → ContentVersion [LatestPublishedVersionId]

Select **Table** for the data type you'd like to map.

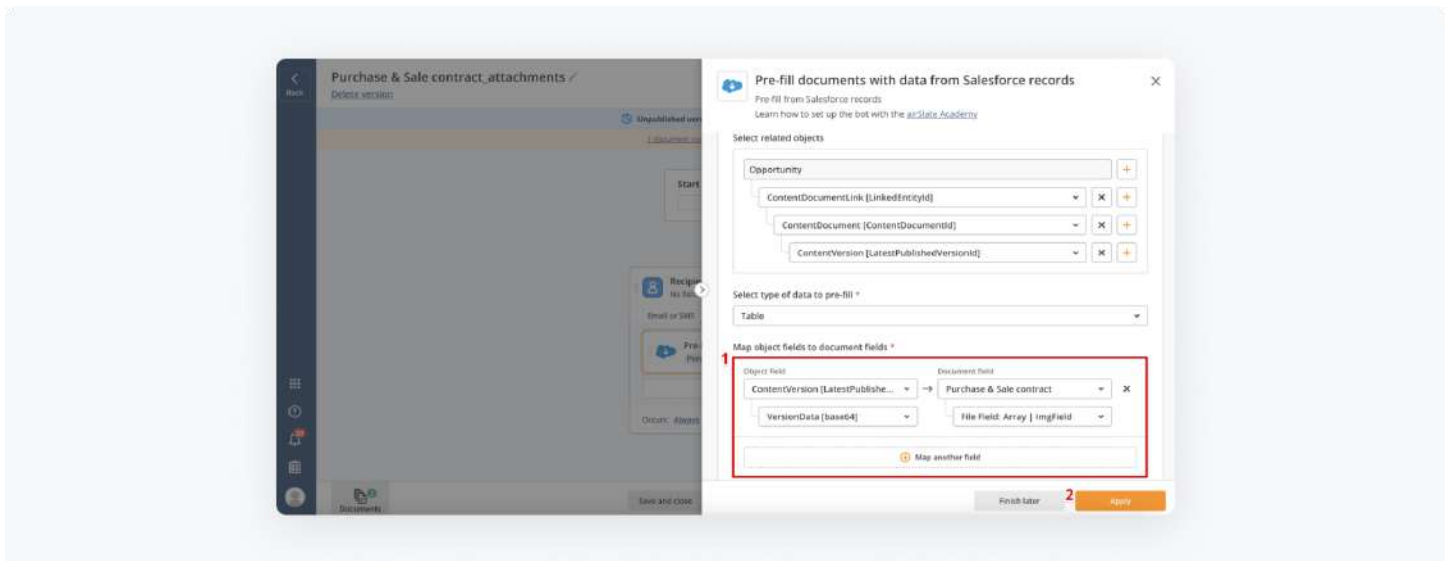


Map object fields to document fields:

- Object Field: **ContentVersion [LatestPublishedVersionId]** → **VersionData [base64]**
- Document Field: Document name → **File Field:** field name

👉 Selecting **VersionData [base64]** will automatically locate the corresponding document file field.

Save your settings by clicking **Apply**.



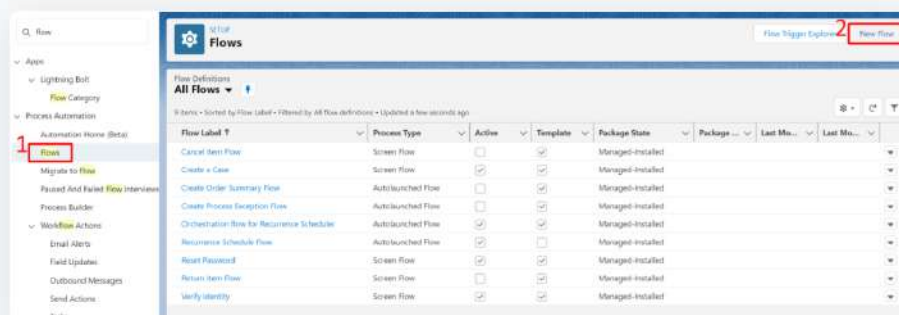
That's it! Once a revision is created, the PDF / DOCX / PNG / JPEG / TXT / RTF files will be automatically added to your document. The document will be pre-filled with all PDF / DOCX / PNG / JPEG / TXT / RTF files contained in the selected Salesforce record.

Salesforce Flow Builder

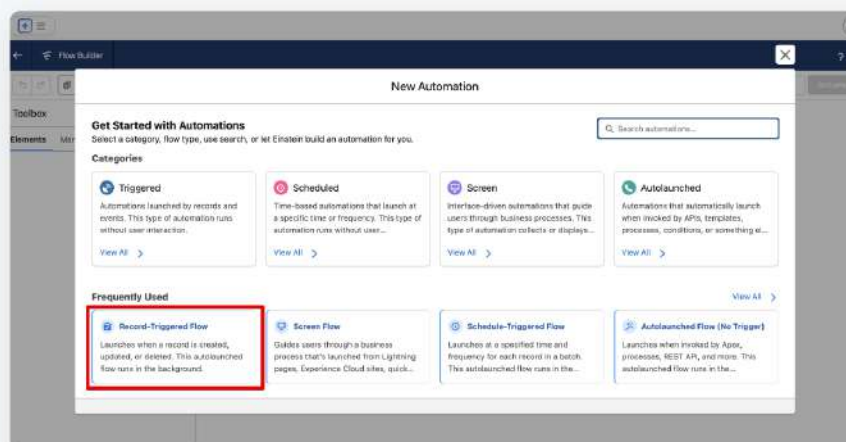
As the Salesforce Process Builder will no longer be supported, there is an alternative method for creating and setting up Salesforce Processes via the Flow Builder. See the information below about how to use it.

Set up a Flow

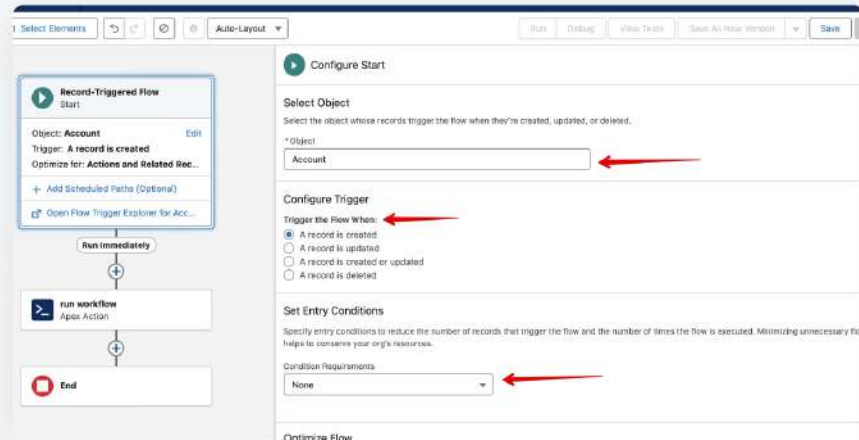
1. To create a Flow, navigate to the Setup and search for **Flows**. Then, select **New Flow**.



2. In the **New Flow** window, select **Record-Triggered Flow**.

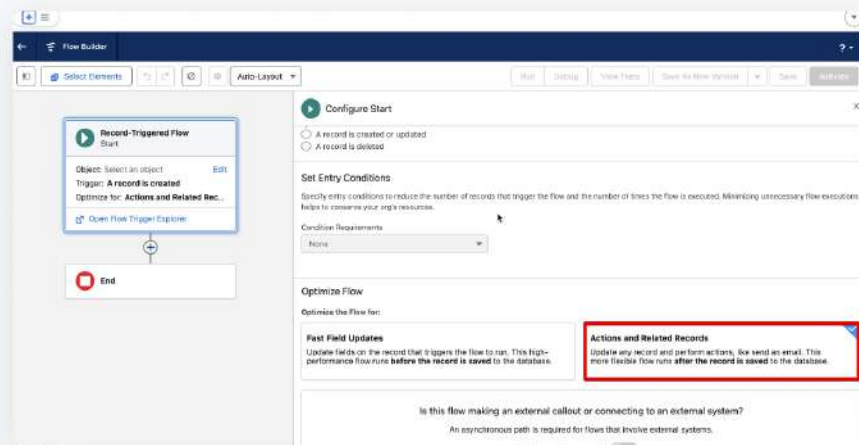


3. You'll be redirected to the **Flow Builder** window. Once the **object** and **trigger condition** have been selected, proceed to setting up the entry conditions. This will eliminate any unnecessary flows.



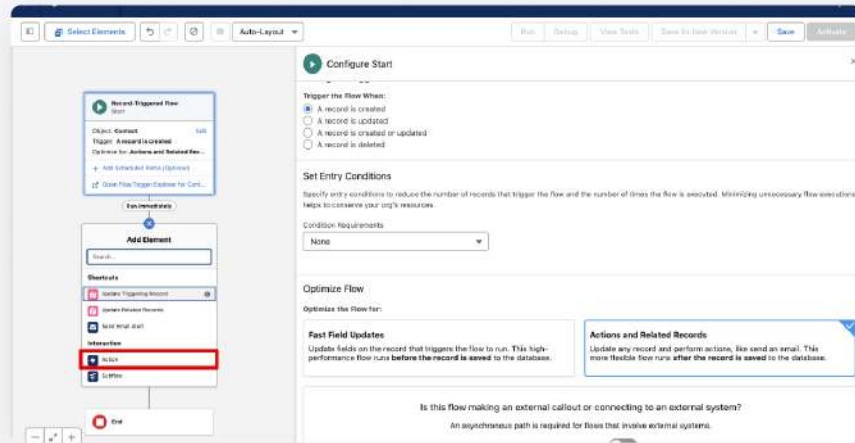
In the **Optimize the Flow for** section, it's required to select **Actions and Related Records**. Otherwise, the **altaFlow** actions won't be available.

Tip: We recommend leaving the checkbox next to **Add Asynchronous Path** unchecked for a more seamless Flow operation.



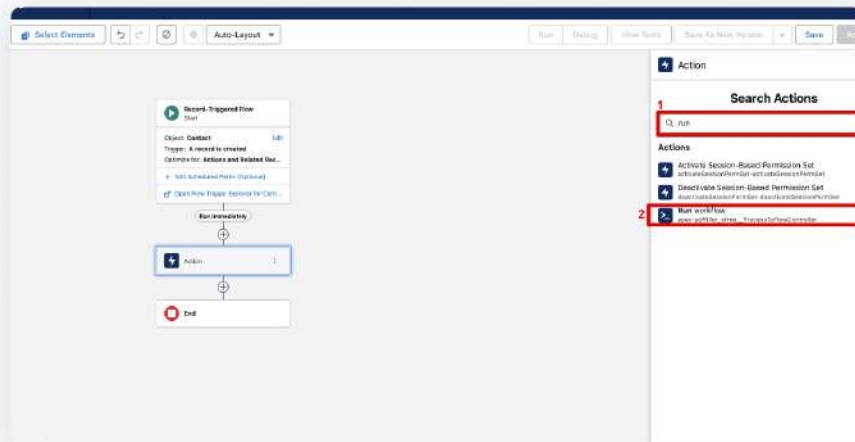
4. Add an element to the flow by clicking the plus icon.

Proceed with adding the Apex action for the created outcome. To do so, click the plus icon under the outcome. Then, in the **Interaction** section, select **Action**.

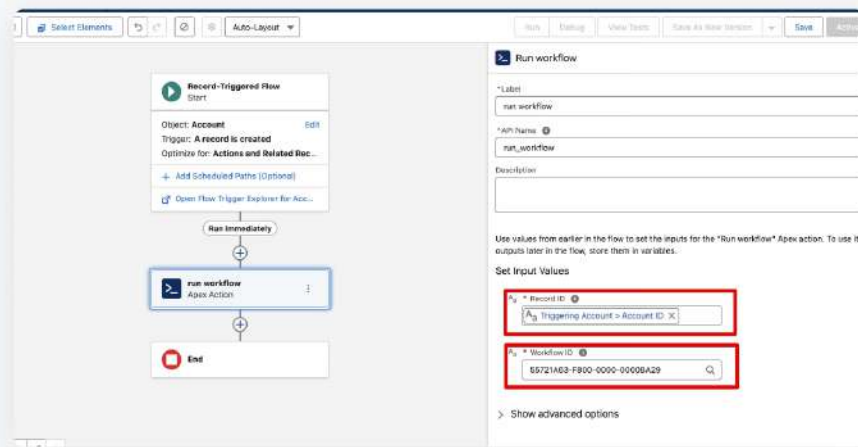


In the **Action** window, select the Apex action you need from the list (**Run workflow** in the example).

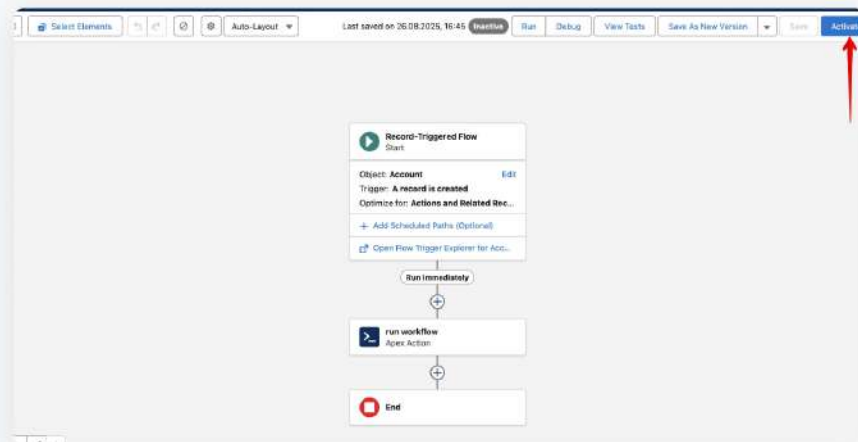
To configure Apex actions for your workflow, check the **Salesforce Process Builder** section of this user guide.



Then, set input values where the Flow ID matches the ID of a current altaFlow workflow, and the record ID is a dynamic variable that will be taken from the Salesforce record where changes occurred.



Once finished, click **Save** and activate the flow.

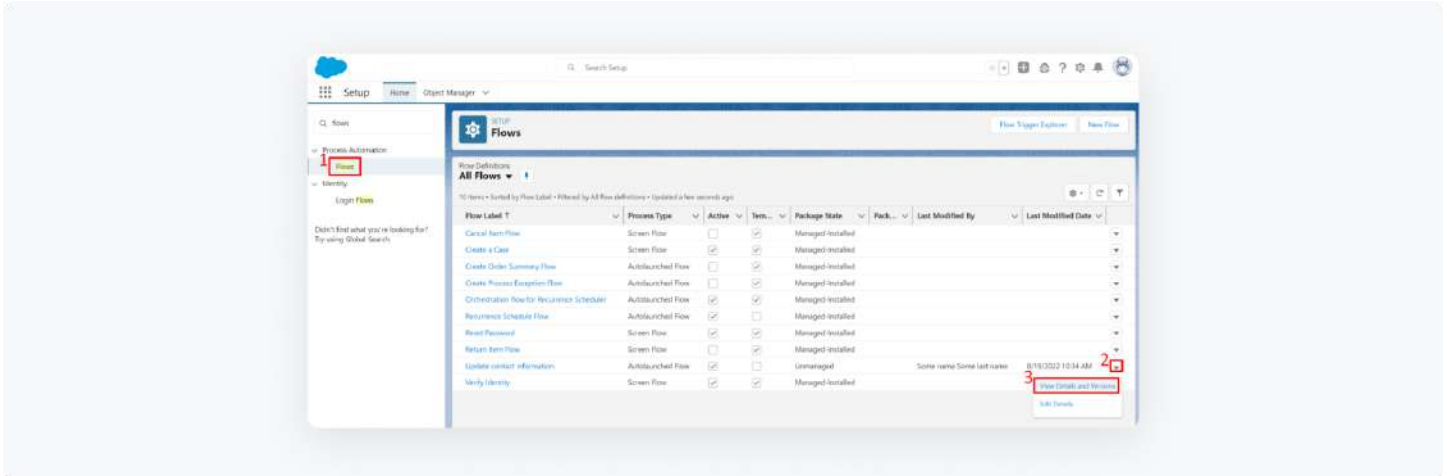


Run altaFlow actions in Flows by users with altaFlow Permission Sets

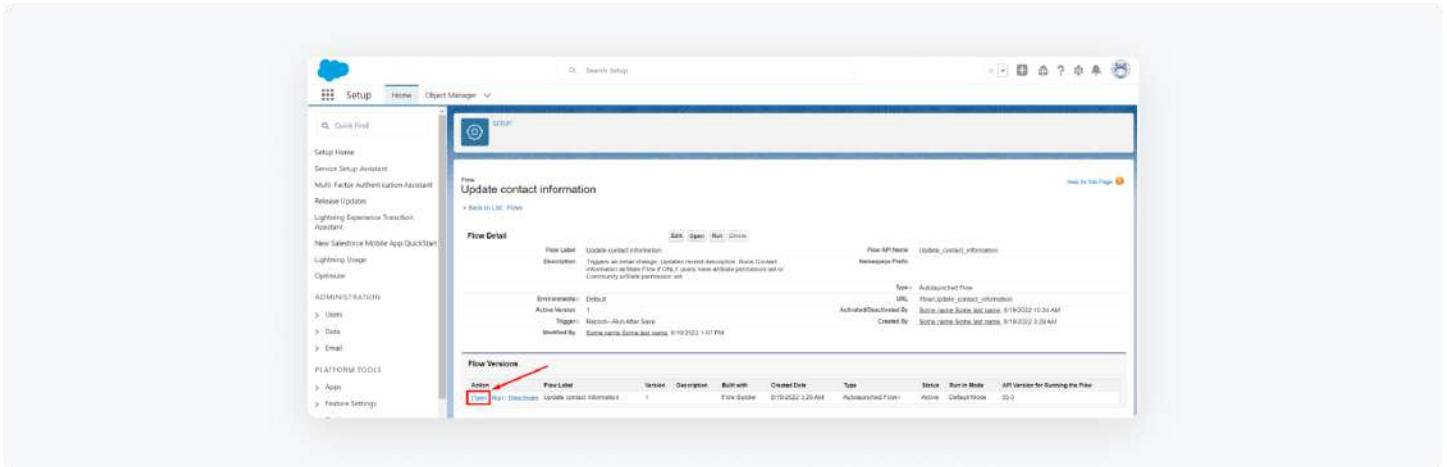
When users without an altaFlow Permission Set start the Flow, the Flow Builder action that triggers an altaFlow action will fail. The Salesforce org administrator is then instantly notified via email each time the Flow fails. To avoid this situation, we recommend checking if users starting Flows have the altaFlow Permission Set.

Let's consider the following example where a user (without an altaFlow Permission Set) should only update a field in a Salesforce record without creating a document in altaFlow.

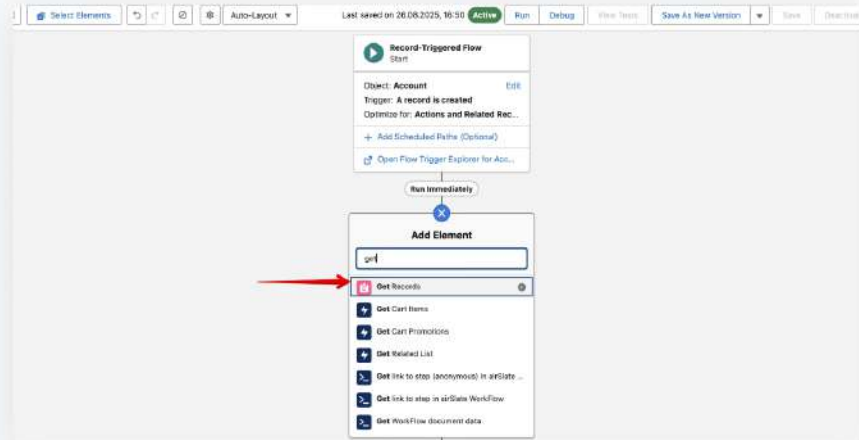
1. In **Setup**, search for **Flows**. Then, click the arrow next to the Flow you need and select **View Details and Versions**.



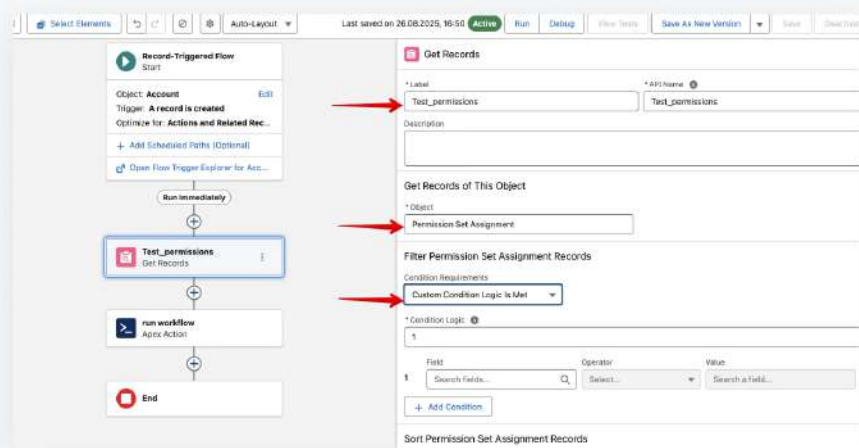
2. Select **Open** next to the Flow version you need.



3. The selected Flow version will open in the Flow Builder. Add the **Get Records** element on the step where you need to check if a user has an altaFlow Permission Set.

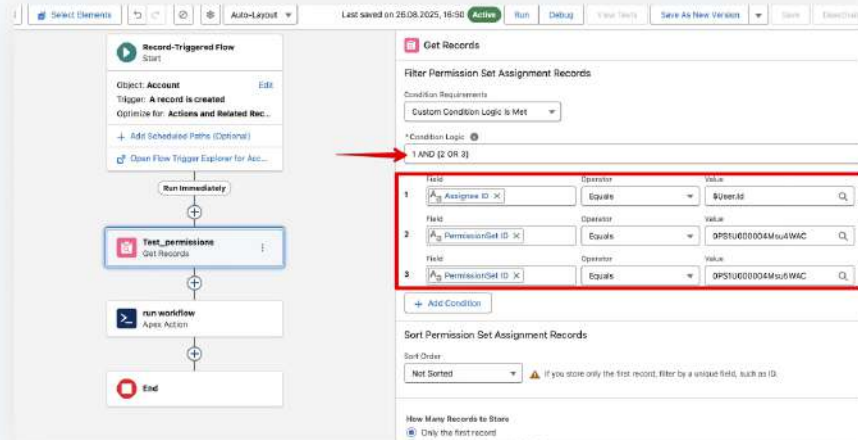


In the **New Get Records** pop-up, set the name for the action, for the object, select **Permission Set Assignment**. For the condition requirements, select **Custom Condition Logic Is Met**.



Once selected, specify the condition logic by entering the constant value **1 AND (2 OR 3)**. Then, enter the following values in the condition fields:

1. Field: **AssigneeId** → Operator: **Equals** → Value: **\$UserId**
2. Field: **PermissionSetId** → Operator: **Equals** → Value: **0PS1U000004Msu4WAC*** (altaFlow Set)
3. Field: **PermissionSetId** → Operator: **Equals** → Value: **0PS1U000004Msu5WAC*** (Community altaFlow Set)



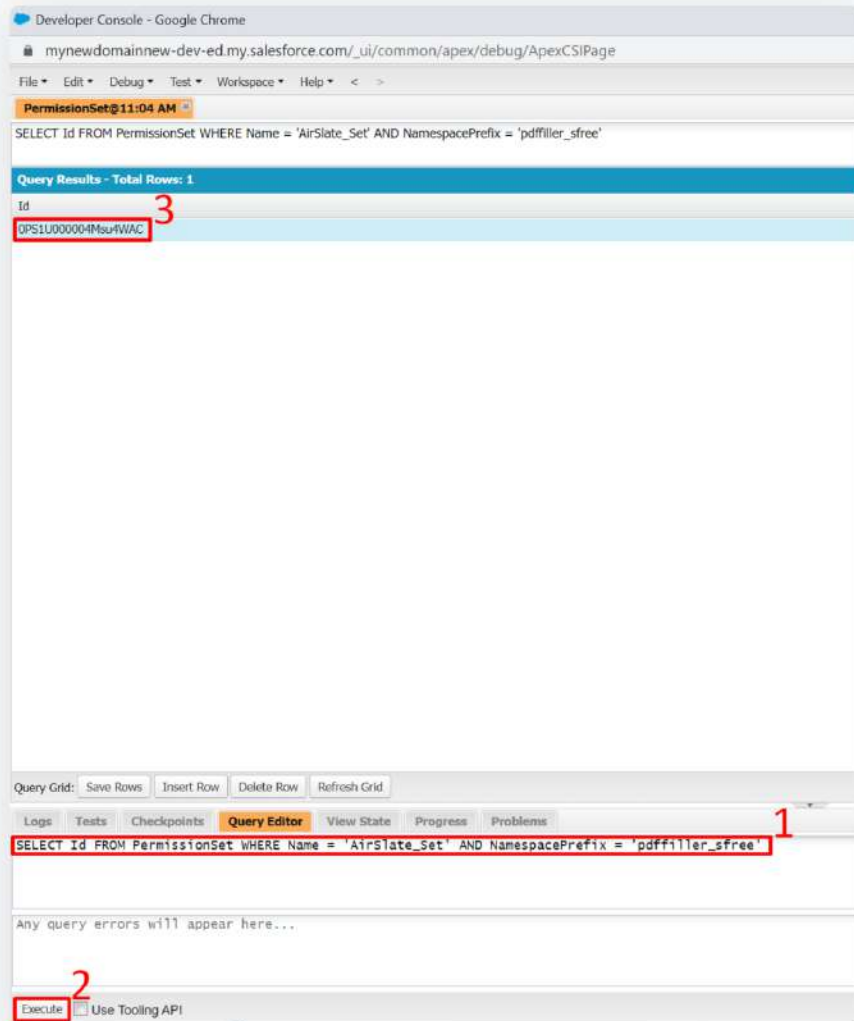
* To retrieve the PermissionSetId of an altaFlow Set, in the **Developer Console**, switch to the **Query Editor** tab and execute the following query:

For an altaFlow Set:

```
SELECT Id FROM PermissionSet WHERE Name = 'AirSlate_Set' AND NamespacePrefix = 'pdffiller_sfree'
```

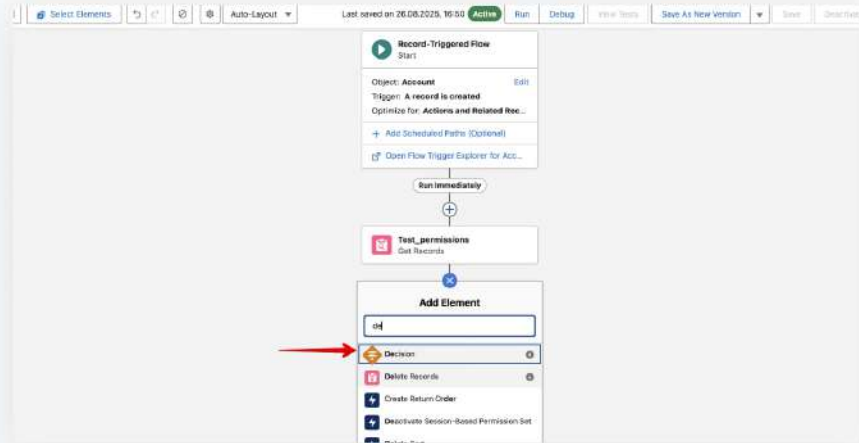
For a Community altaFlow Set:

```
SELECT Id FROM PermissionSet WHERE Name = 'Community_AirSlate_Set' AND NamespacePrefix = 'pdffiller_sfree'
```



When finished, click **Done**.

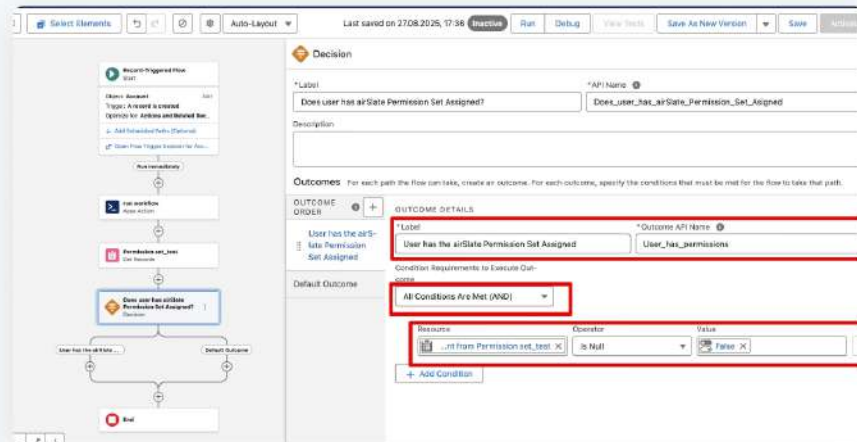
5. Proceed with adding the **Decision** element.



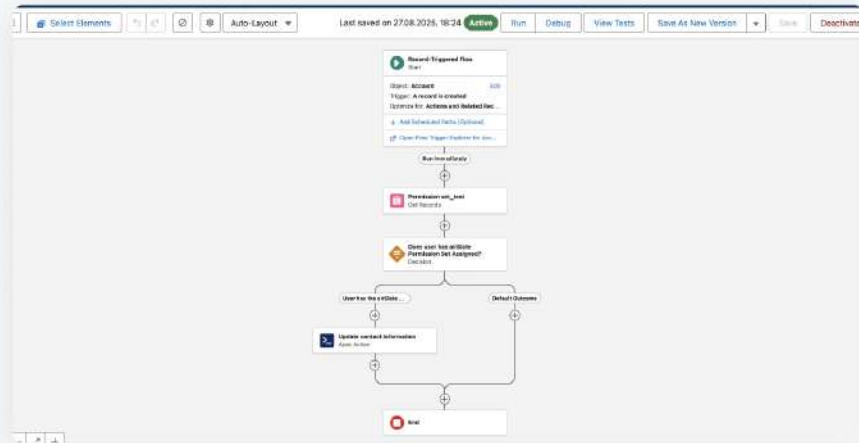
Once done, the **New Decision** pop-up will open. For the condition requirements to execute the outcome, leave **All Conditions Are Met** (selected by default). Then, provide the following field values:

Resource: **Permission Set Assignment from User_Permission_Set_Assignments** → Operator: **Null** → Value: **False**

Once finished, click **Done**. Be sure to activate the current Flow version.



That's it! The configured Flow will appear as follows:



Once the Flow is started by a user without the altaFlow Permission Set, the record description will be updated but no new documents will be created. And the Salesforce administrator won't receive any error emails.

Get link to step in altaFlow workflow/Get link to step (anonymous)

This Apex action lets Salesforce admins create a Flow, so users can start workflow steps in altaFlow docs from Salesforce with no need for email links, boosting security and making things smoother.

👉 Before starting, ensure a smooth process by following these steps:

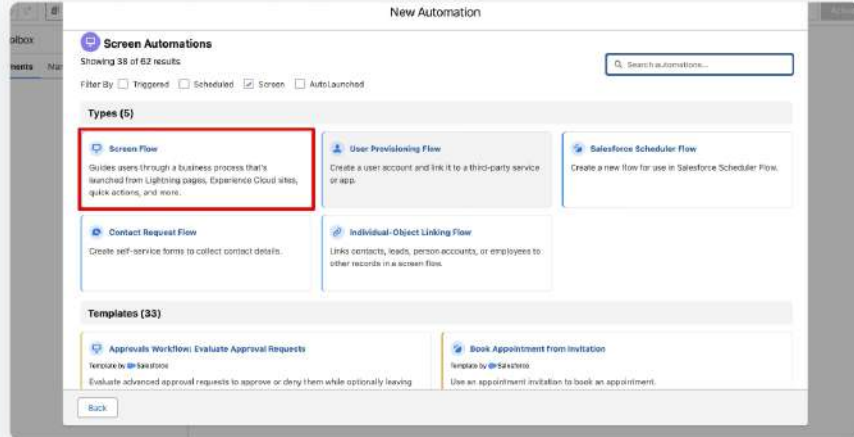
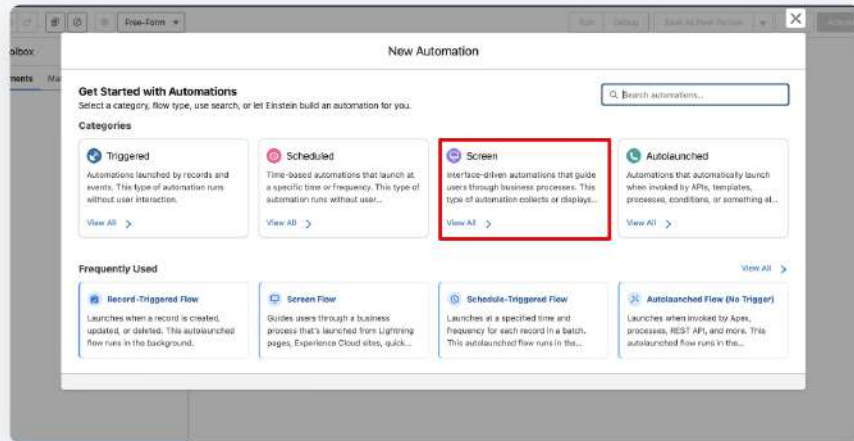
1. Create a text field in the Salesforce object (for example, **Account**) to store the Document ID.
2. In the altaFlow workflow, use the **Invoke Salesforce process** bot to populate the Document ID field in Salesforce.
3. Assign the required step in the altaFlow workflow to a Salesforce Standard user with Flow permissions, essential for configuring the Salesforce Flow.



Note: Enable **Flow user** status for the step to ensure the custom button with the link becomes available for this user.

Now, let's proceed to configuring the Salesforce Flow.

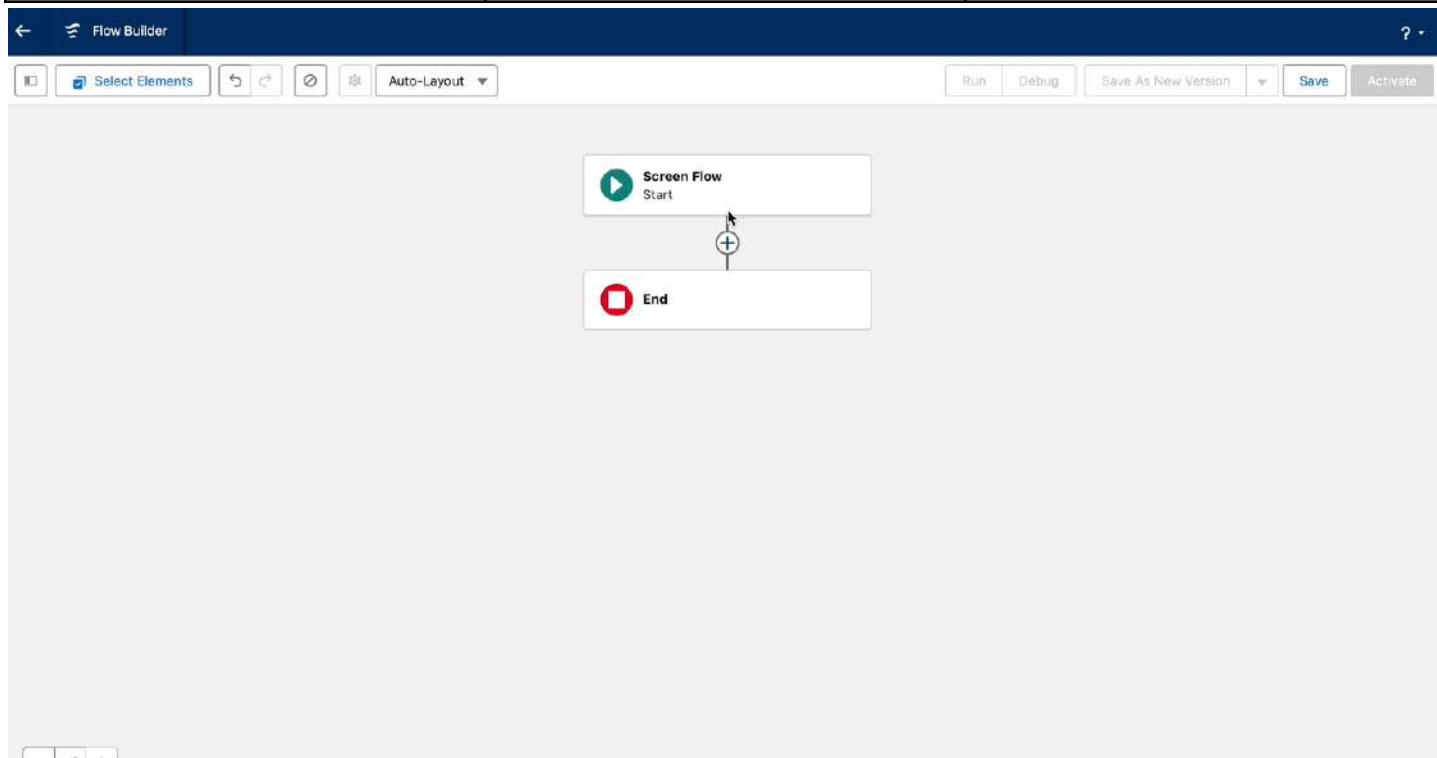
1. In Salesforce **Setup**, navigate to **Flows**, then **New Flow**, and choose **Screen >>Screen Flow**.



2. Click the plus icon, choose **Action**, and search for the needed Apex action.

Apex Action	Purpose	Outcome
Get link to step in altaFlow	This action creates a link to a specific step in the altaFlow	Only specific people can access and work on the step.

workflow	workflow. Only users assigned to that step can access the link.	
Get link to step (anonymous)	This action generates a link to a step in the workflow, which anyone can access with the link, even if they aren't assigned to the step.	Anyone with the link, even if not a part of the workflow, can view and access the step.

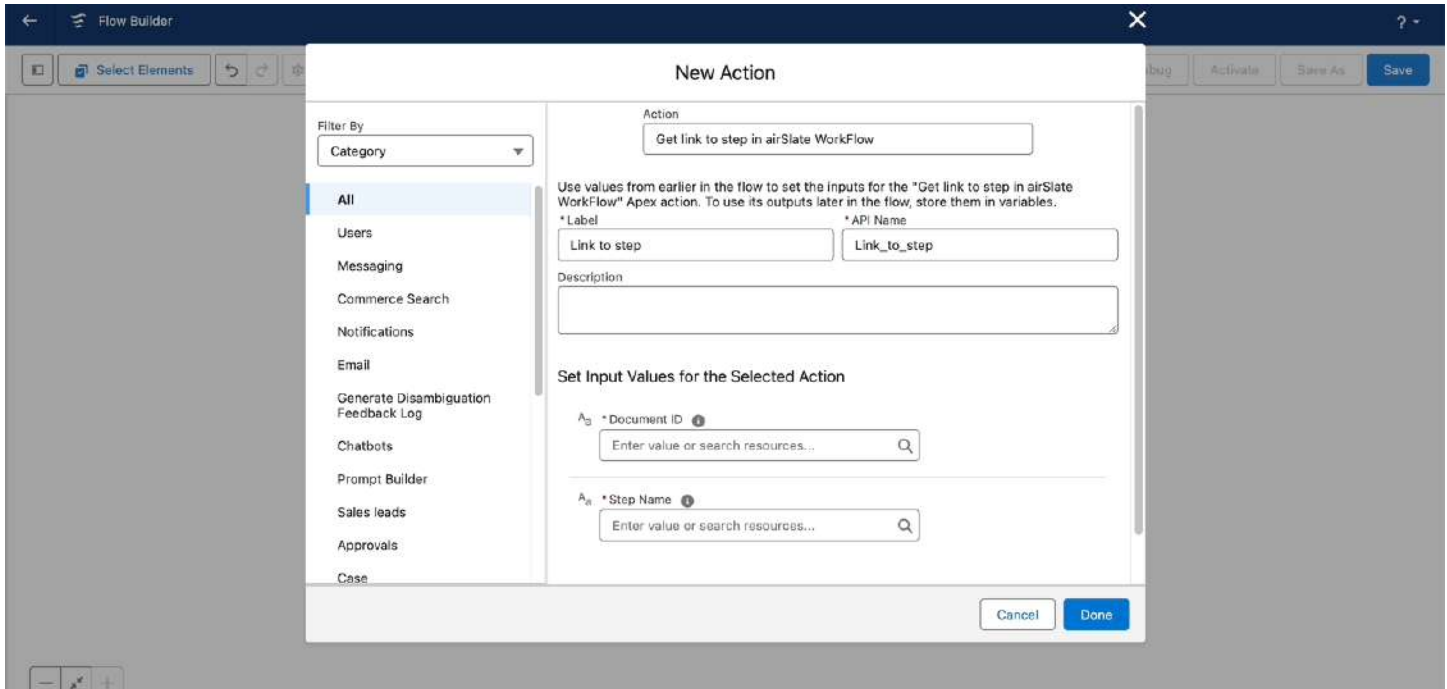


3. Set input values for the selected action as follows:

1. Create a new resource such as the **recordId** variable, representing the record with the Document ID.



Note: Ensure the variable is named **recordId**.



Flow Builder

Select Elements

Filter By

Category

All

Users

Messaging

Commerce Search

Notifications

Email

Generate Disambiguation Feedback Log

Chatbots

Prompt Builder

Sales leads

Approvals

Case

New Action

Action

Get link to step in airSlate WorkFlow

Use values from earlier in the flow to set the inputs for the "Get link to step in airSlate WorkFlow" Apex action. To use its outputs later in the flow, store them in variables.

* Label

Link to step

* API Name

Link_to_step

Description

Set Input Values for the Selected Action

* Document ID

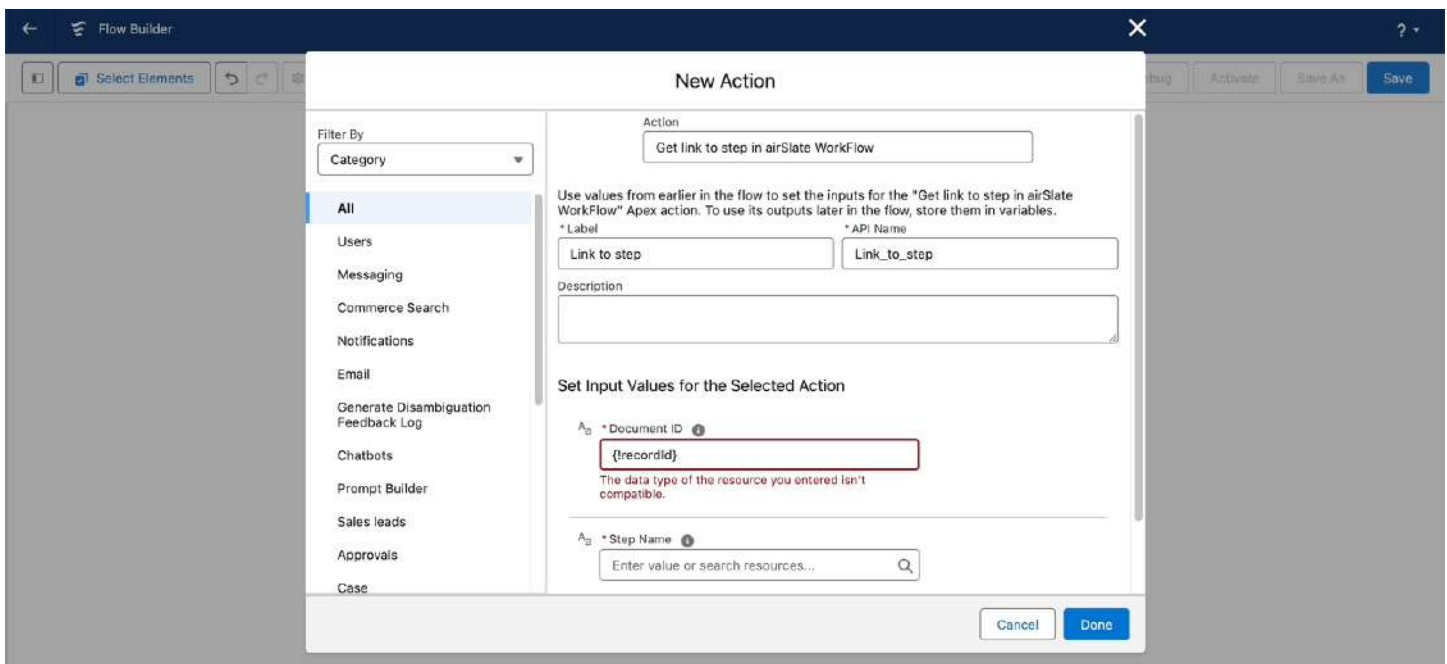
Enter value or search resources...

* Step Name

Enter value or search resources...

Cancel Done

2. Add the **DocumentId** input value for the custom Document ID field. The Document ID field value will appear as follows `{!recordId.Document_ID_c}`
3. Finally, specify the step name (for example, **Step 2**).



Flow Builder

Select Elements

Filter By

Category

All

Users

Messaging

Commerce Search

Notifications

Email

Generate Disambiguation Feedback Log

Chatbots

Prompt Builder

Sales leads

Approvals

Case

New Action

Action

Get link to step in airSlate WorkFlow

Use values from earlier in the flow to set the inputs for the "Get link to step in airSlate WorkFlow" Apex action. To use its outputs later in the flow, store them in variables.

* Label

Link to step

* API Name

Link_to_step

Description

Set Input Values for the Selected Action

* Document ID

{!recordId}

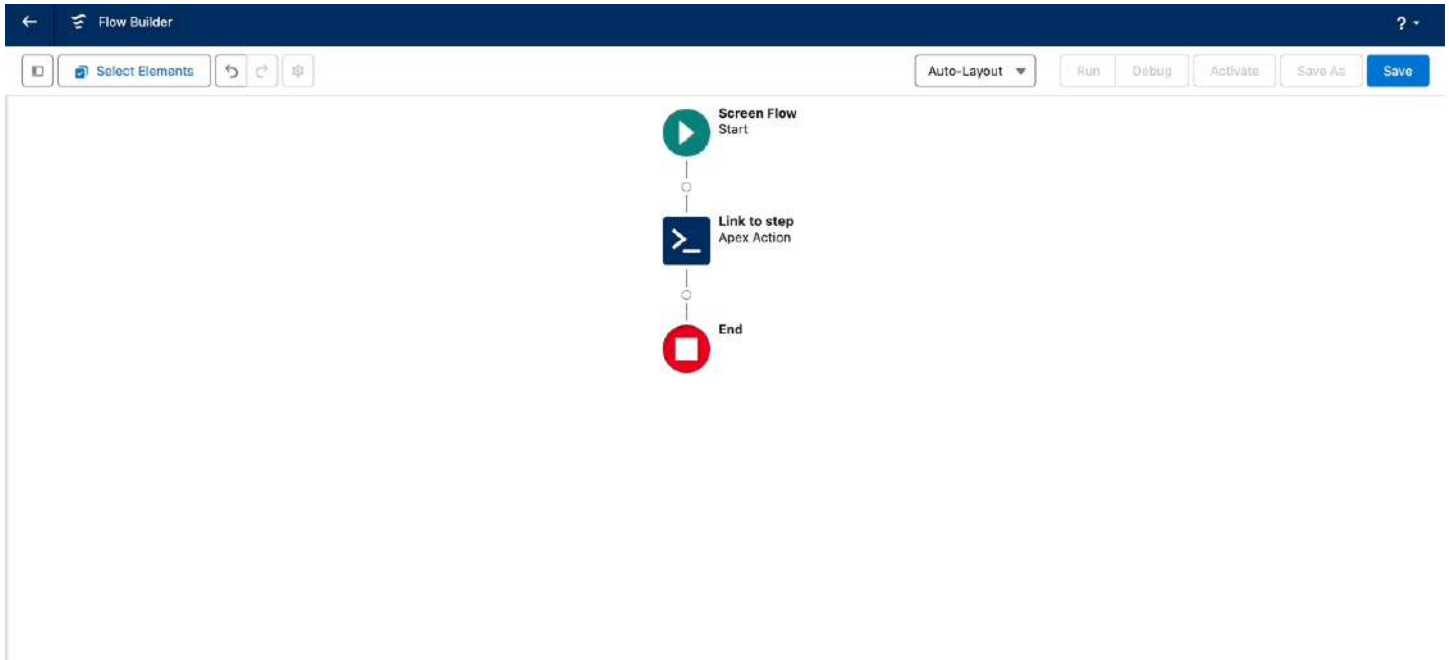
The data type of the resource you entered isn't compatible.

* Step Name

Enter value or search resources...

Cancel Done

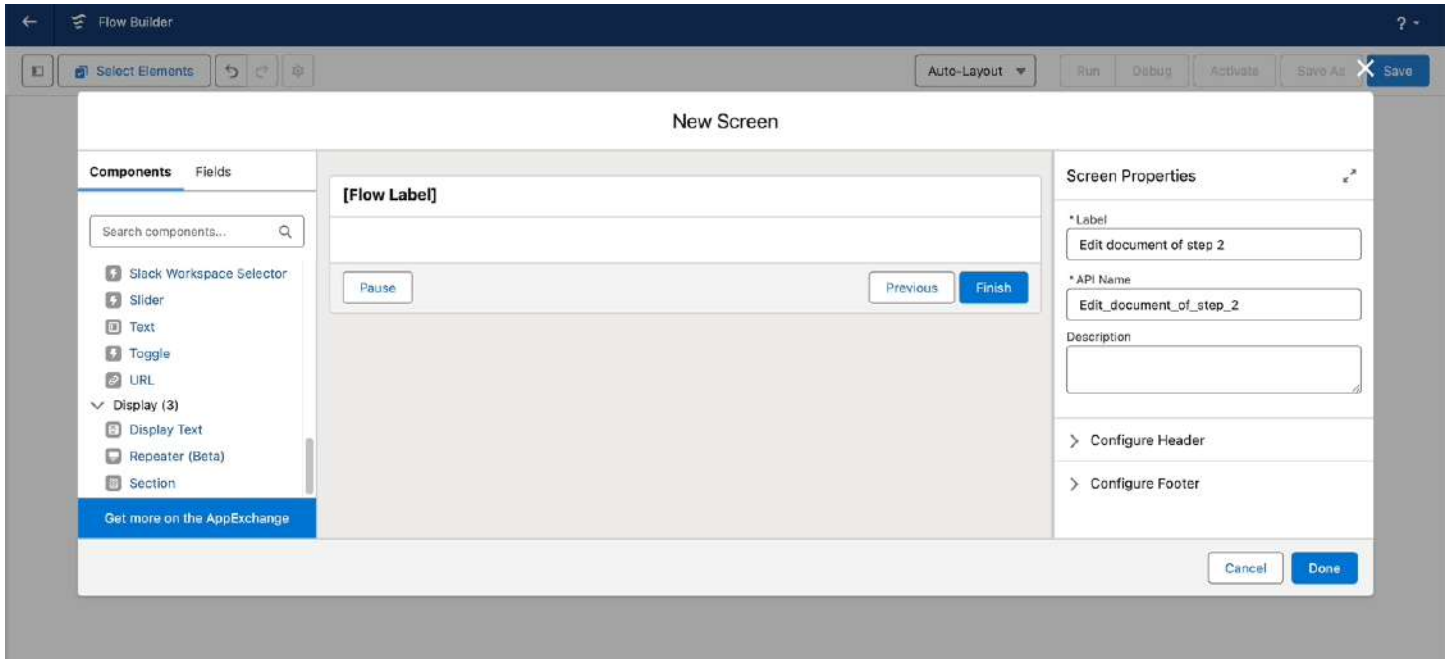
4. Configure the modal window to display the link to the specified step by adding a **Screen** element. Enter the label and API name (auto-generated).



Use the **Display Text** component to add the following variables:

<code>{!Link_to_step.returnUrl}</code>	Use this variable to pass the link to the specified step in the document. Apply a link to this variable using the variable's text to create a clickable link in a modal window in Salesforce.
<code>{!Link_to_step.error}</code>	Use this variable to display any error messages. Consider using red text color for this variable to highlight error messages for users.

👉 The **Link_to_step** name is a dynamic and mirrors the Action element's name.



Save and activate the Salesforce Flow.

5. Create a custom action to generate a button for the specified step. Navigate to **Object Manager**, then select Object (**Account**). Go to **Buttons, Links, and Actions**, then click **New Action**. Choose **Flow** as the action type, and select the Salesforce Flow you created.

Next, go to **Account** → **Page Layouts** → **Account Layout** → **Mobile and Lightning Actions**. Drag and drop the custom button with the link to step to the **Mobile and Lightning Actions** canvas.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
airSlate Button	pdfFiller_sfree__airSlate_Button__c	Custom Object		1/24/2024	✓
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			
Associated Location	AssociatedLocation	Standard Object			
Authorization Form	AuthorizationForm	Standard Object			
Authorization Form Consent	AuthorizationFormConsent	Standard Object			
Authorization Form Data Use	AuthorizationFormDataUse	Standard Object			

6. In Salesforce, go to **Admin Tools**, then **Custom buttons**. Create a button connected to the altaFlow

workflow with the Invoke Salesforce Process bot.

How this works:

1. Administrators should initiate the workflow to transfer and store the Document ID in the Document ID field of the Account record.
2. Subsequently, users can use the custom action button, which contains a link to their specific step.
3. Upon clicking the button, users should click the link to access the document with the fields enabled for the current step.

In case of any errors, Salesforce administrators will receive immediate email notifications.

Get workflow document data

Using this Apex class in Salesforce Flow Builder, administrators can access and convert data from altaFlow workflows into JSON format in Salesforce. This allows for easier and more organized document data processing.

Before starting, ensure a smooth process by following these steps:

1. Create a text field in the Salesforce object (for example, **Account**) to store the Document ID.
2. In the altaFlow workflow, use the **Invoke Salesforce process** bot to populate the Document ID field in Salesforce.

Now, let's proceed to configuring the Salesforce Flow.

1. In Salesforce **Setup**, navigate to **Flows**, then **New Flow**, and choose **Screen Flow**.

Setup

Search Setup

Quick Find

Setup Home

Service Setup Assistant

Commerce Setup Assistant

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Apps

> Feature Settings

SETUP Flows

Flow Trigger Explorer

New Flow

Flow Definitions

All Flows

19 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label	Process Type	A...	T...	Package State	P...	Last Modified By	Last Modifie...
Basic Approval Request	Flow Orchestration for CMS	☒	☒	Managed-Install...			
Cancel Item Flow	Screen Flow	☐	☒	Managed-Install...			
CMS: Check Whether Any Step is Co...	Evaluation Flow	☒	☒	Managed-Install...			
CMS: Notify Content Author	Screen Flow	☒	☒	Managed-Install...			
CMS: Review Content	Screen Flow	☒	☒	Managed-Install...			
CMS: Submit Content for Review	Screen Flow	☒	☒	Managed-Install...			
CMS: Withdraw Review Request	Screen Flow	☒	☒	Managed-Install...			
Create a Case	Screen Flow	☒	☒	Managed-Install...			
Create Order Summary Flow	Autolaunched Flow	☐	☒	Managed-Install...			
Create Process Exception Flow	Autolaunched Flow	☐	☒	Managed-Install...			
Edit document of Recipient 2	Screen Flow	☒	☐	Unmanaged	Some name Some last na...	4/16/2024 1:28 PM	
Find Contact Associated with Messa...	Individual-Object Linking Flow	☒	☒	Managed-Install...			
Generate Payment Link	Screen Flow	☒	☒	Managed-Install...			
New flow	Autolaunched Flow	App Store	☐	Unmanaged	Some name Some last na...	4/15/2024 5:42 AM	

2. Click the plus icon, choose **Action**, and search for the needed Apex action.

Flow Builder

Select Elements

Auto-Layout

Run

Debug

Save As New Version

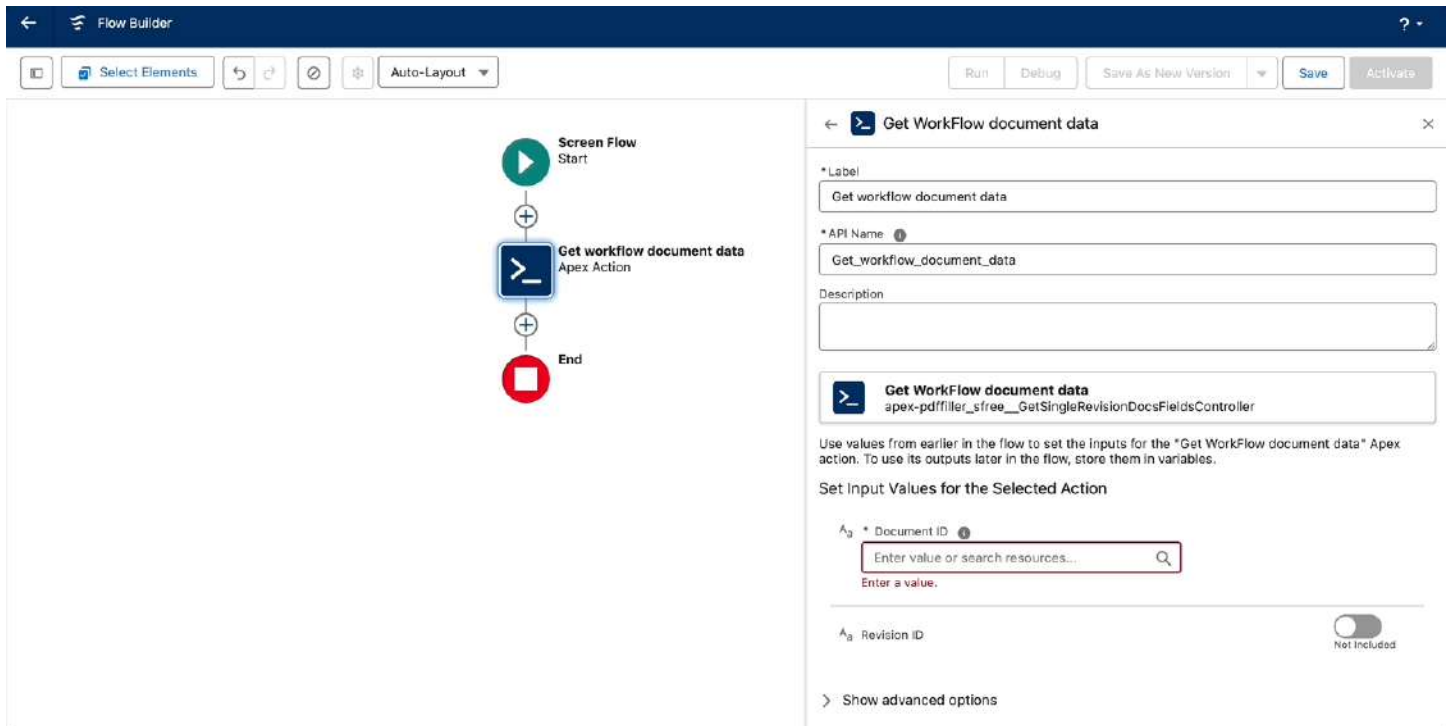
Save

Activate

Screen Flow Start

End

Enter a label and API name (auto-generated) for the Action. Then, provide the ID of the document from which the data will be pulled.



The screenshot displays the Flow Builder interface. On the left, a flow diagram shows a sequence: 'Screen Flow Start' (green circle with a play button) → 'Get workflow document data' (blue square with a play button and a plus sign) → 'End' (red circle with a stop sign). The 'Get workflow document data' action is labeled 'Apex Action'. On the right, the configuration panel for the 'Get Workflow document data' action is shown. It includes fields for 'Label' (set to 'Get workflow document data'), 'API Name' (set to 'Get_workflow_document_data'), and a 'Description' field. Below these, the action is identified as 'Get Workflow document data' with the class 'apex-pdfFiller_sfrec_GetSingleRevisionDocsFieldsController'. A note states: 'Use values from earlier in the flow to set the inputs for the "Get Workflow document data" Apex action. To use its outputs later in the flow, store them in variables.' Under 'Set Input Values for the Selected Action', there is a field for 'Document ID' (labeled A₃) with a search bar and a 'Revision ID' field (labeled A₄) with a toggle switch labeled 'Not Included'. A 'Show advanced options' link is at the bottom.

Optionally, you can also define a specific revision of the source document. To specify a document revision, enable the toggle switch and enter the relevant revision ID.

The screenshot shows the Flow Builder interface. On the left, a flow diagram consists of three elements: a green 'Screen Flow Start' circle, a blue 'Get workflow document data' Apex Action rectangle, and a red 'End' circle, all connected by plus signs. The right panel is titled 'Get WorkFlow document data' and contains the following fields:

- *Label: Get workflow document data
- *API Name: Get_workflow_document_data
- Description: (empty text area)
- Get WorkFlow document data (apex-pdffiller_sfree__GetSingleRevisionDocsFieldsController)
- Use values from earlier in the flow to set the inputs for the "Get WorkFlow document data" Apex action. To use its outputs later in the flow, store them in variables.
- Set Input Values for the Selected Action:
 - A₃ Document ID: B6CB702C-8E10-0000-0000C9C1
 - A₃ Revision ID: (highlighted with a red box and a red arrow pointing to it) Enter value or search resources... (with an 'Included' toggle switch)
- > Show advanced options

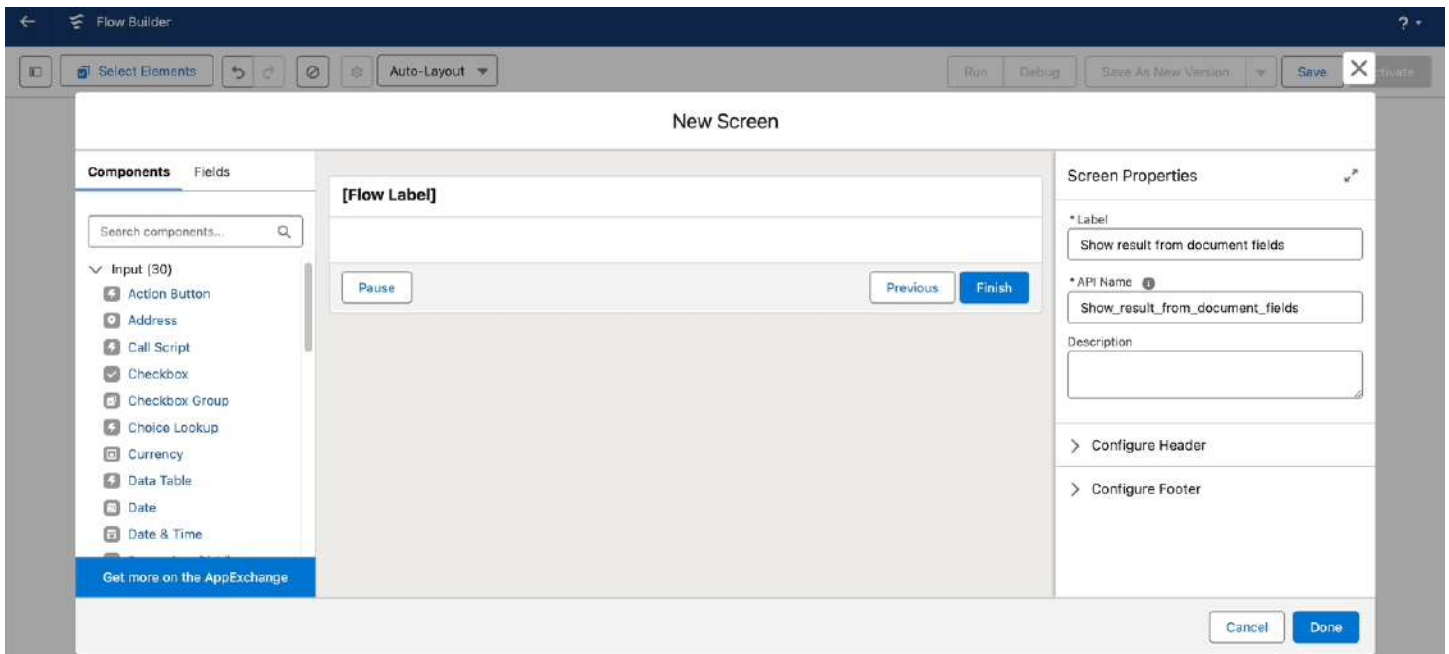
3. Configure the modal window to display the parsed data by adding a **Screen** element. Enter the label and API name (auto-generated).

The screenshot shows the Flow Builder interface after adding a new 'Screen' element. The flow diagram now consists of four elements: a green 'Screen Flow Start' circle, a blue 'Get workflow document data' Apex Action rectangle, a new blue 'Screen' rectangle, and a red 'End' circle, all connected by plus signs. The right panel is empty.

Locate the **Display Text** component in the left sidebar, then drag and drop it onto the canvas. Then, search for the following variables in the element properties panel by starting to enter *get*:

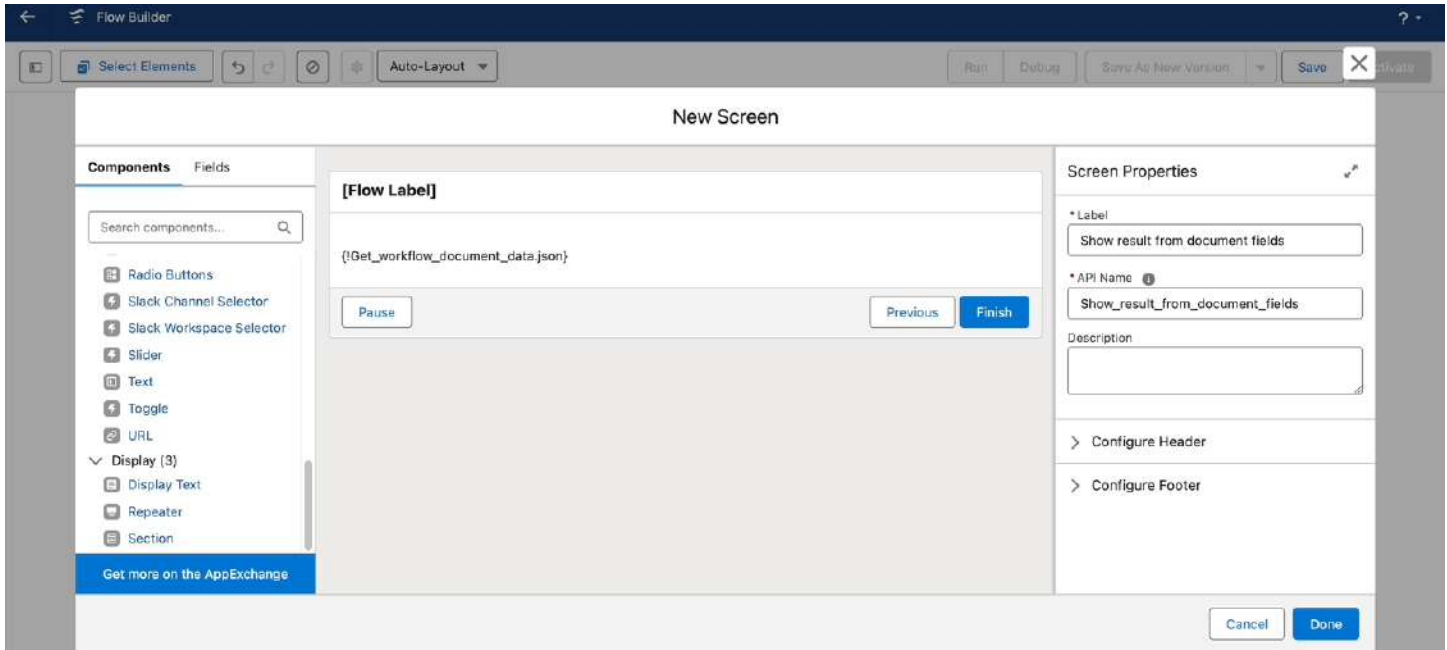
```
{!Get_workflow_document_data.json}
```

This variable retrieves JSON data from the selected document.



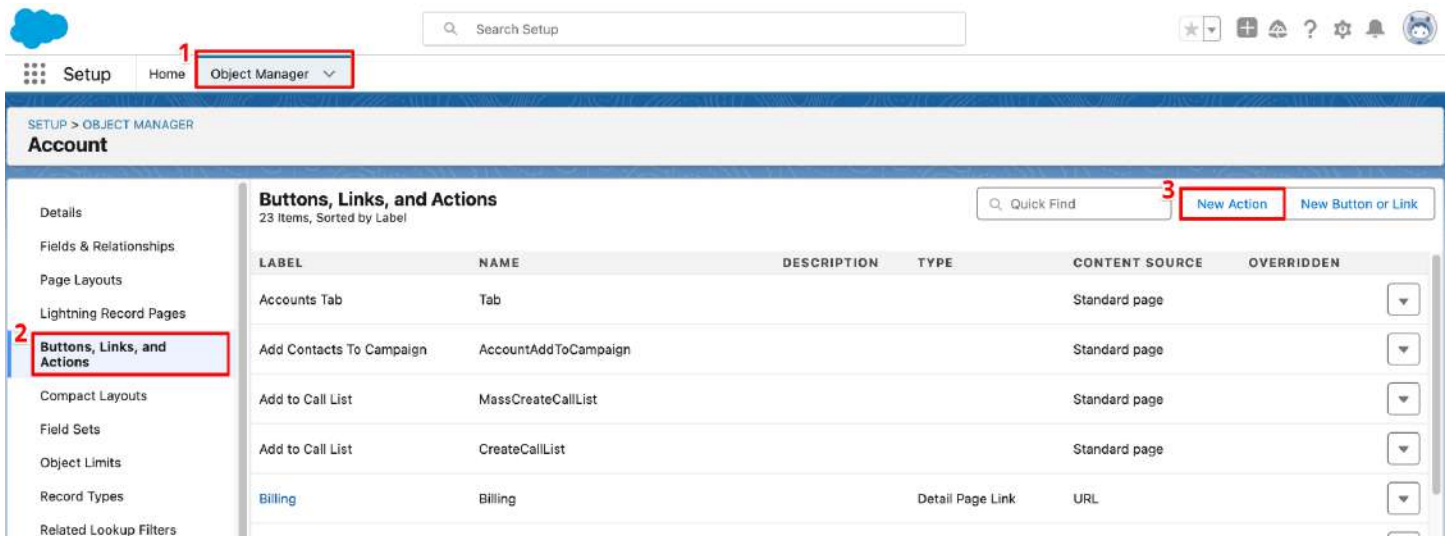
```
{!Get_workflow_document_data.error}
```

This variable displays error messages. Use red text to highlight these messages for better visibility.



Save your settings by selecting **Done**. Then, save and activate the Salesforce Flow.

4. Create a custom action to generate a button for accessing document data. Navigate to **Object Manager**, then select Object (**Account**). Go to **Buttons, Links, and Actions**, then click **New Action**.



Choose **Flow** as the action type, and select the Salesforce Flow you created. Add the label and API name (auto-generated) for the custom action.

Setup > OBJECT MANAGER

Account

Account Actions
New Action

Enter Action Information

Object Name: Account

Action Type: Flow

Flow: Get document data

Standard Label Type: --None--

Label: Get_document_data_2

Name: Get_document_data_2

Description:

Icon: Change icon

Next, go to **Account** → **Page Layouts** → **Account Layout** → **Mobile and Lightning Actions**. Drag and drop the custom button with the access to document data onto the **Salesforce Mobile and Lightning Experience Actions** canvas.

Setup > OBJECT MANAGER

Account

Page Layouts

Mobile & Lightning Actions

Actions

Post File New Task New Contact New Case Log a Call New Note New Opportunity New Event Link Poll

Question Email Change Owner Include Offline Check for New Data Submit for Approval Get Contacts Edit Delete

Change Record Type Sharing View Account Hierarchy Call Send Text Email (mobile only) View Website

Account Detail

Standard Buttons

Edit Change Owner Change Record Type Send Survey Delete View Account Hierarchy Sharing Sharing Hierarchy Include Offline Get Survey Invitation Check for New Data View Partner Sc

Custom Buttons

6. In Salesforce, go to **Admin Tools**, then **Custom buttons**. Create a button connected to the altaFlow

workflow with the Invoke Salesforce Process bot.

Process overview:

1. Administrators should initiate the workflow to transfer and store the Document ID in the Document ID field of the Account record.
2. Users can click the custom action button to generate a JSON of document fields, which retrieves data into Salesforce.

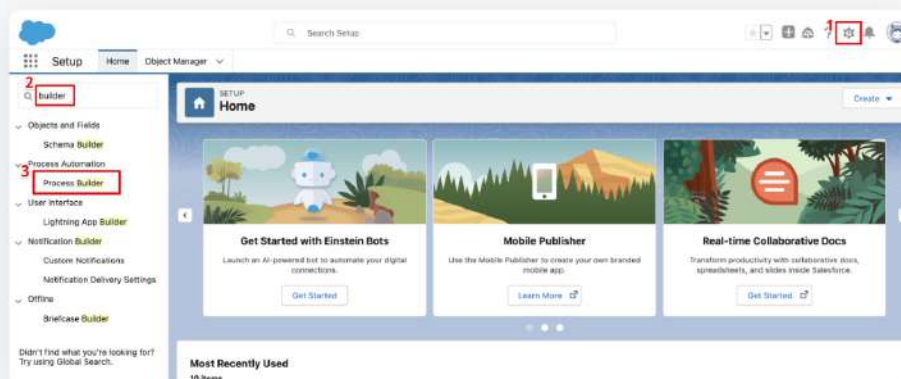
In case of any errors, Salesforce administrators will receive immediate email notifications.

Salesforce Process Builder

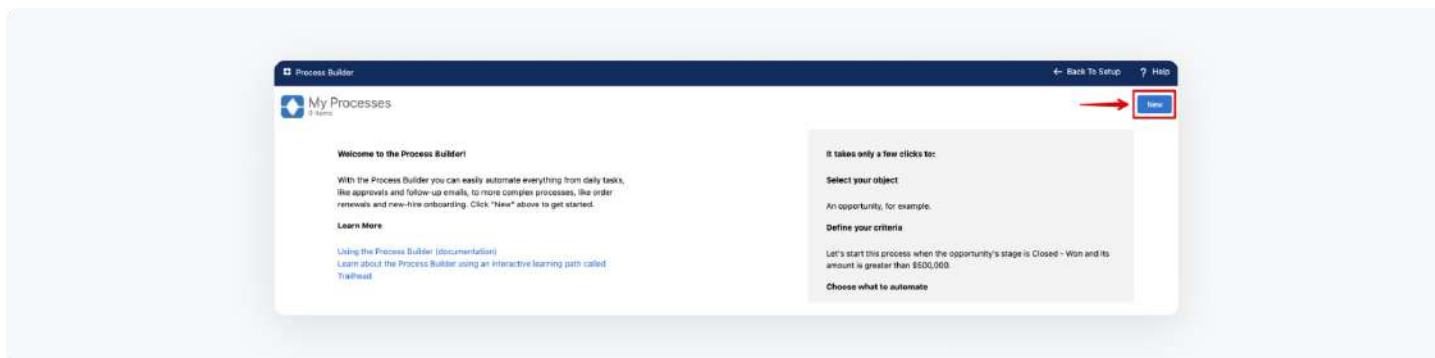
The Salesforce Process Builder automates routine tasks for completing documents. Set up documents to be automatically created once certain changes occur to your Salesforce records or specify other conditions for triggering workflows in the Process Builder.

Let's take a look at how it works:

1. On the Salesforce main page, go to **Setup**. Type *builder* in the quickfind and in the search result, select **Process Builder**.



2. On the **Process Builder** page, select **New** to create a new process.

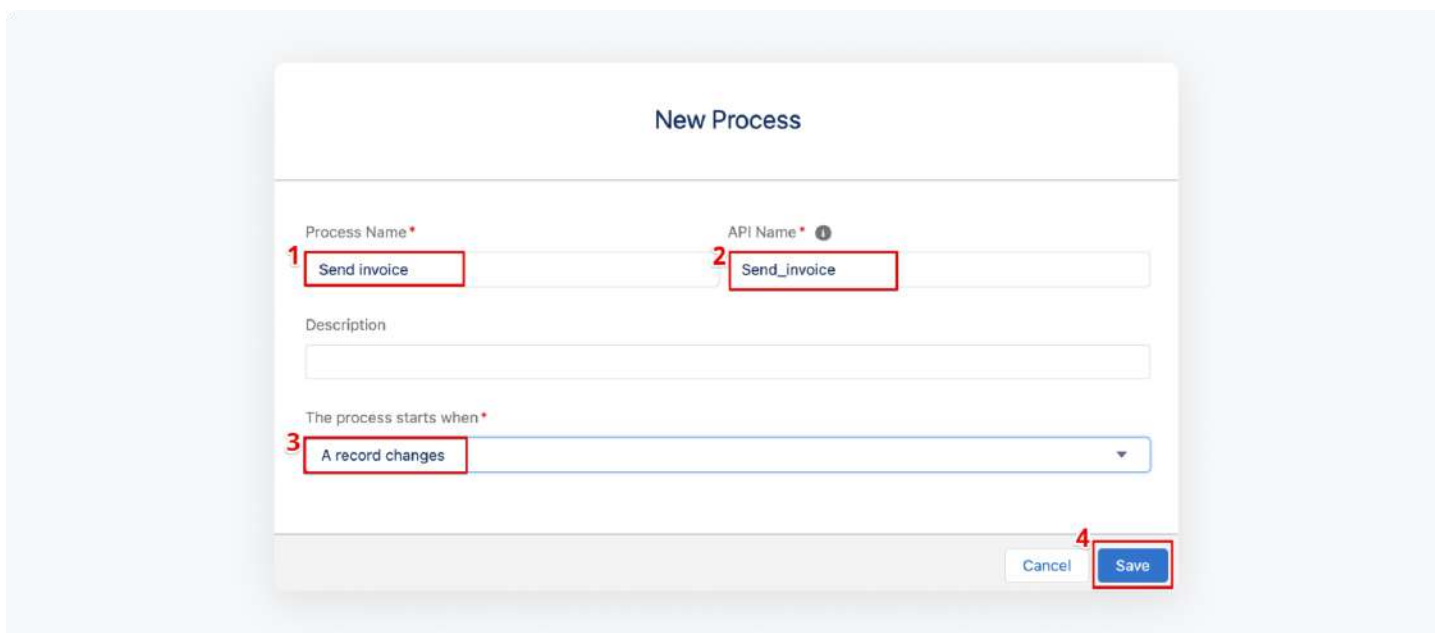


3. In the **New Process** modal window, enter a name for the process. The API name will be entered automatically right after clicking the **API Name** field.

You also have the option to add a description of the process being created.

Define the action that will act as the trigger for creating a document according to a specific altaFlow workflow (in the example, **the process starts when a record changes**).

When finished, click **Save**.



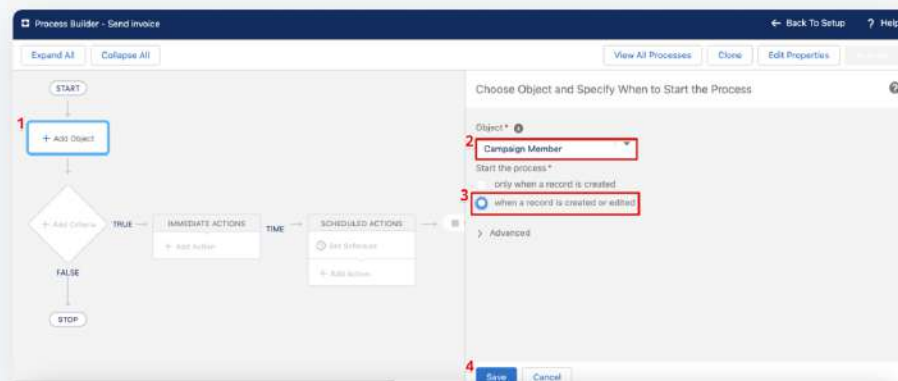
4. Next, the Process Builder creation scheme will open. Click **Add Object** to select the object for which you are creating a process.

 **Note:** When setting up processes that will trigger the activation/deactivation of Salesforce users in altaFlow, you can select any Salesforce object that has a user lookup.

In the **Object** dropdown, choose the object you'd like to base this process on (**Campaign Member**, in the example).

Specify when to start the process (**when a record is created or edited**, in the example). When finished, click **Save**.

 **Note:** Before saving your changes, confirm the selection. You won't be able to change the object after saving it.



5. Select **Add Criteria**.

Here you can configure settings that will trigger:

- the creation/deletion of a document

- the creation & completion of a document revision
- the activation/deactivation of Salesforce users in altaFlow

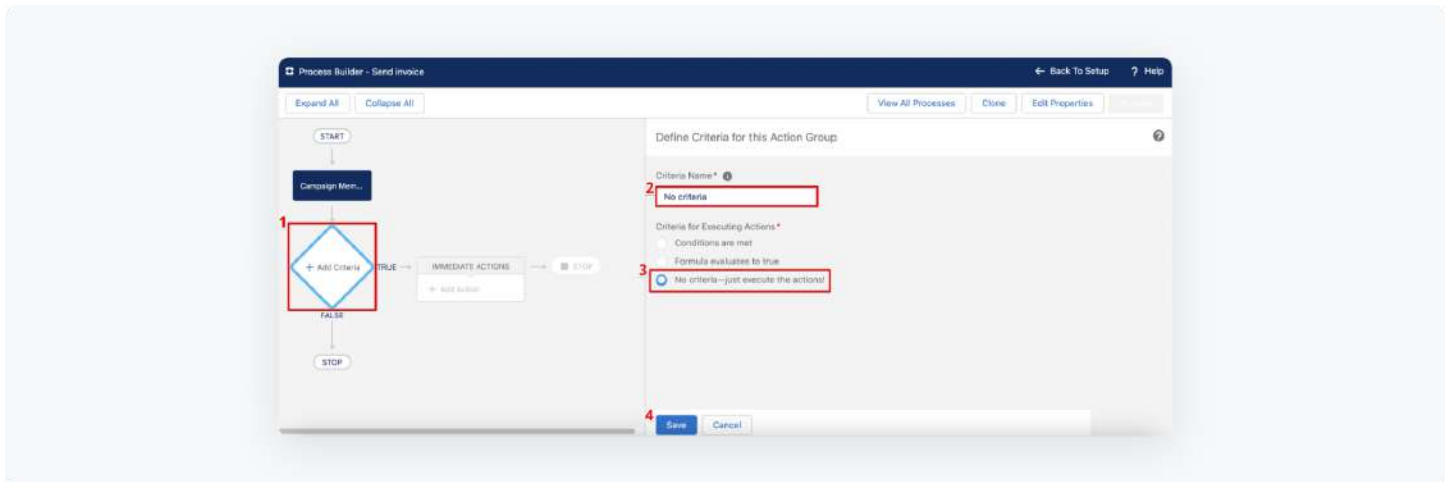
For each action, you should configure different settings and use different Apex classes. Let's consider the following examples.

Create/delete documents

Enter a name for the criteria (**No Criteria**, in the example). The name you enter will appear on the canvas. We recommend using a name that helps you differentiate between other criteria nodes.

Select **No criteria-just execute the actions** for the criteria type to execute actions.

When finished, click **Save**.

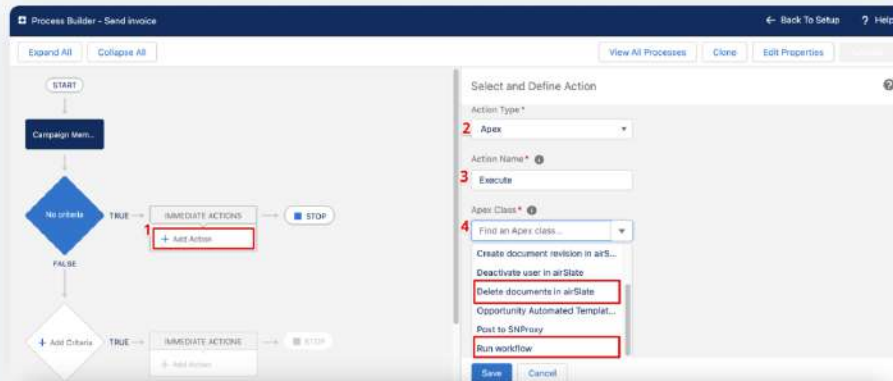


Follow the TRUE arrow and in the **Immediate Actions** section, select **Add Action**.

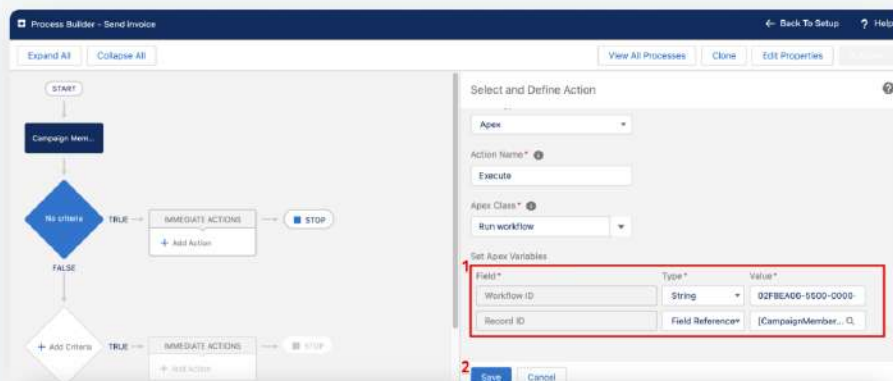
For the **Action Type**, select **Apex** from the dropdown menu. Enter the action name (**Execute** in the example).

For the **Apex Class**, you can select:

- **Run workflow** – allows for creating new documents
- **Delete documents in altaFlow** – triggers a document's deletion in altaFlow



The **Apex Variables** settings will appear:



- For the first row: Workflow ID (required field) → type: **String** → value: **workflowID***.
- For the second row: Record ID (required field) → type: **Field Reference** → value: Contact Id, Campaign Id, Campaign Member Id, etc.)

👉 To find a workflow ID, go to the **altaFlow Admin Tools** in Salesforce, then select the **Workflows** tab. Click on the workflow ID to copy it.

Workflow name	Workflow ID	Filters	Workflow links
Client data	5786F241-F500-0000-0000BA29	No filters, Add filters	Edit links
Client form	FD245AF9-D100-0000-0000BA29	Available in 4 layouts	Edit links
Client_form_new	F50212C8-0400-0000-0000BA29	No filters, Add filters	Edit links
Client_form_new	D4D905C8-0400-0000-0000BA29	No filters, Add filters	Edit links
Client's data	20AE40F6-A500-0000-0000BA29	No filters, Add filters	Edit links

When all settings have been specified, click **Save**.

Create & finish document revisions

Configuring this process will trigger the creation of document revisions once certain changes occur to Salesforce records. Those revisions will then be automatically completed in the specified time period.

The standard Process Builder's time period is measured in hours and days. If you need other values (minutes or seconds), you should configure additional settings.

To do so, in the **Object Manager** select the Salesforce object you need. Then, select **Fields & Relationships** and click **New**. In the list of fields, select **Formula**.

Enter a field label (**now_plus_custom_time_interval** in the example). For the **Formula Return Type** select **Date/Time**.

Enter your formula that will specify the custom time period for completing the revision. We used the next formula in the example that corresponds to 1 hour and 20 seconds:

$\text{NOW() + (1 / (24)) + (20 / (24 * 60 * 60))}$

Due to the requirements of the formula's structure, we can't set a 20-second time period. Later, we will remove 1 hour in the settings and the time period will correspond to 20 seconds.

Once finished, save your settings. The set time period is mostly required for bots to finish their work.

Let's find out how to do this:

1. Select **Add Criteria**. Then, enter a name for the criteria (**Selected checkbox**, in the example).

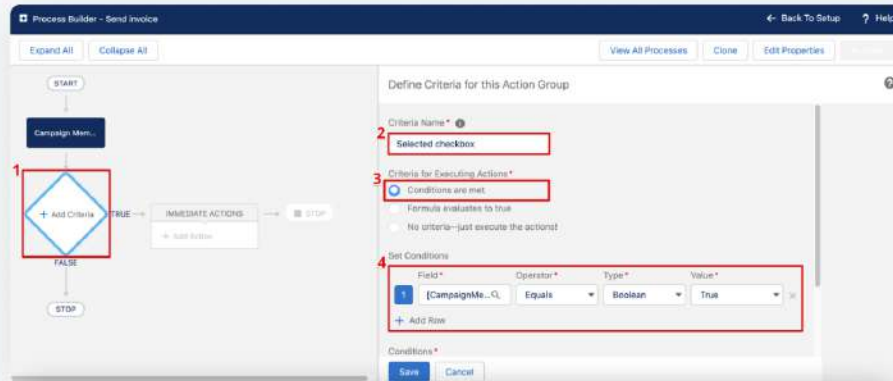
The name you enter will appear on the canvas. We recommend using a name that helps you differentiate between other criteria nodes.

Select **Conditions are met** for the criteria type to execute actions. In **Set Conditions**, select the Salesforce field that will trigger document creation & completion. This will allow you to select the required checkbox in the Advanced Settings.

For this example we have previously created a custom checkbox field that will trigger document creation & completion once checked.

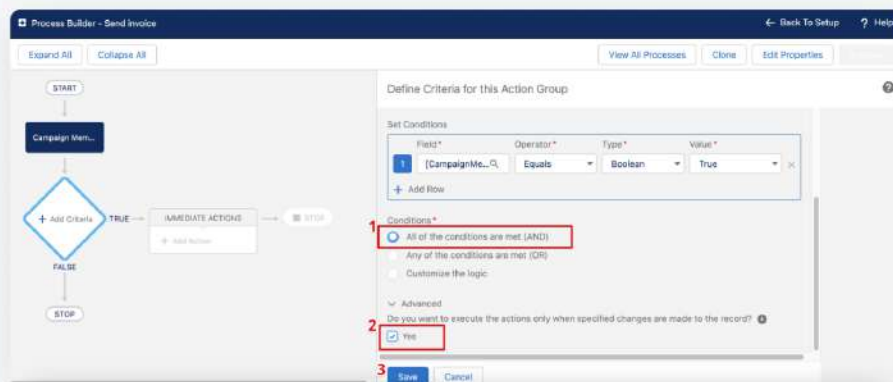
Once entered, the settings will appear as follow:

Field: **Salesforce triggering field** → Operator: **Equals** → Type: **Boolean** → Value: **True**



Select conditions (**All of the conditions are met (AND)**) in the example). In the **Advanced settings** section, select the **Yes** checkbox.

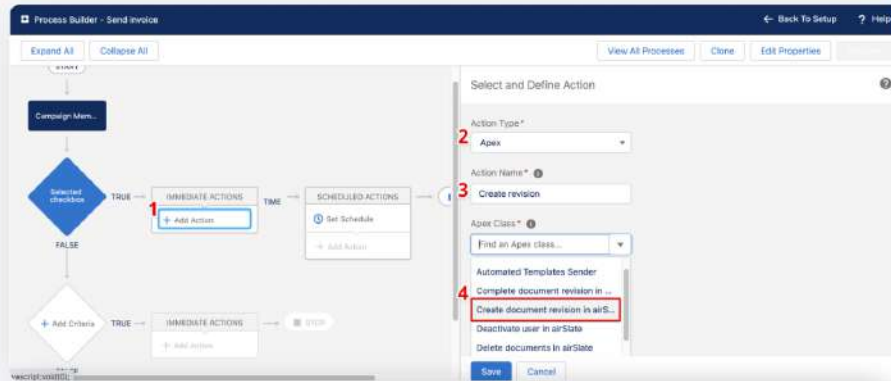
When finished, click **Save**.



2. Follow the TRUE arrow and in the **Immediate Actions** section, select **Add Action**.

For the **Action Type**, select **Apex** from the dropdown menu. Enter the Action name (**Create revision**, in the example).

For the **Apex Class**, select **Create document revision in altaFlow**.

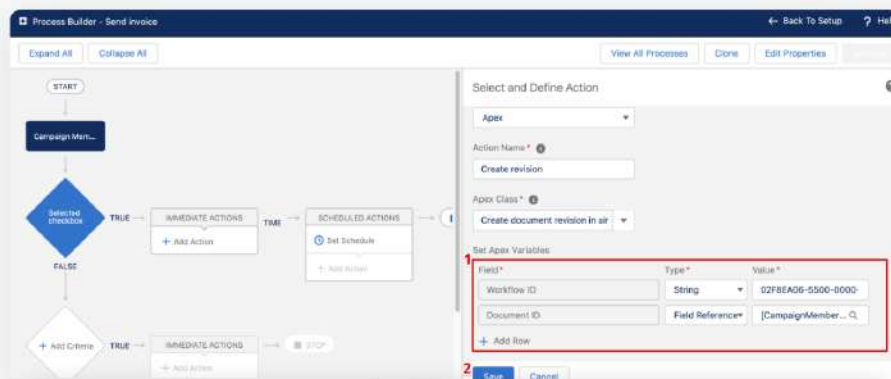


The **Apex Variables Settings** section will appear:

- For the workflow ID (required field) → type: **String** → value: **workflow ID**.
- For the document ID (required field) → type: **Field Reference** → value: **custom field where a dynamic document ID will be saved**

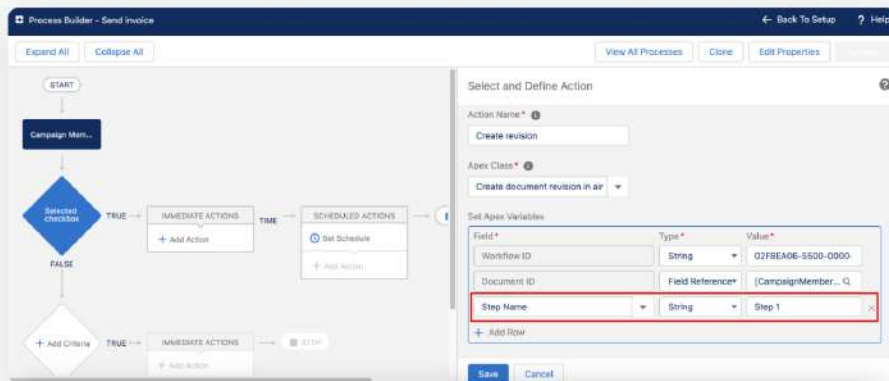


Note: Be sure to create in advance a Text-type custom field where the dynamic document ID will be saved. Then, add the Invoke Salesforce Process bot that will update this field in Salesforce with the document ID (**Data Variable** → **Document Name** → **Document ID**), using the condition: **Document revision = 0**.



You can also add the altaFlow step name by clicking the plus icon. Configuring this field will allow you to create document revisions under different altaFlow steps.

For the Step Name (optional) → type: **String** → value: **any step name used in altaFlow that you want to set up the Salesforce Process for**

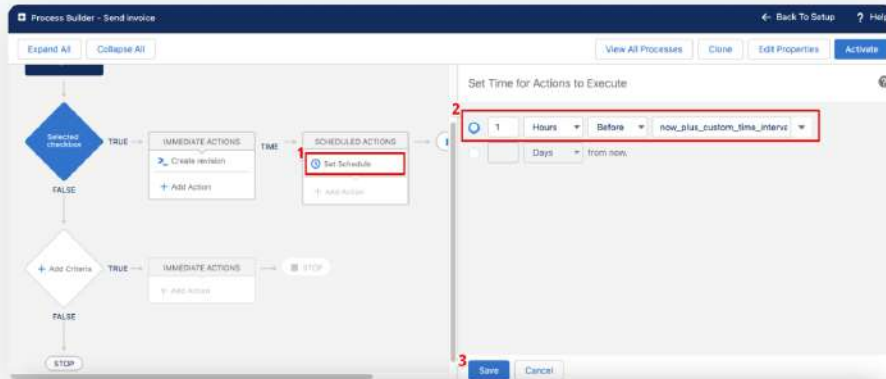


When all settings have been specified, click **Save**.

3. Select **Set Schedule**. Then, set a time for the action to execute (20 seconds in the example):

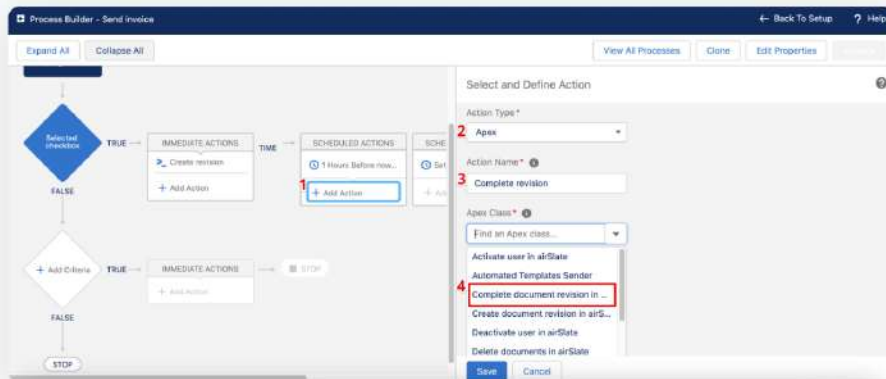
1 → Hours → Before → now_plus_custom_time_interval

When finished, click **Save**.



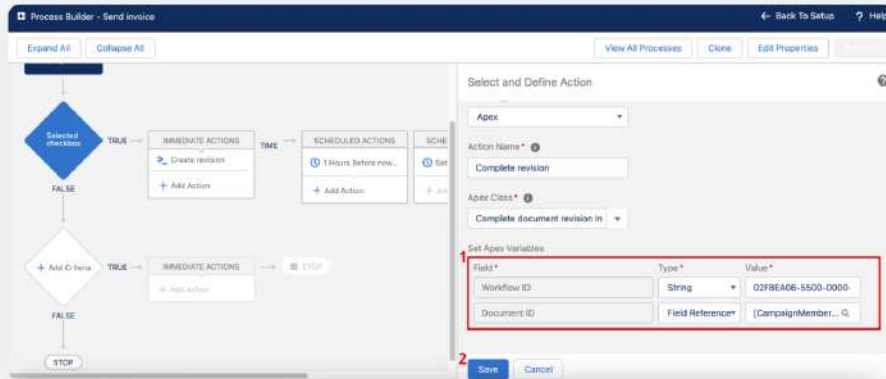
Then, in **Scheduled Actions**, select **Add Action**. For the **Action Type**, select **Apex** from the dropdown menu.

Enter the Action name (**Complete revision**, in the example). For the **Apex Class**, select **Complete document revision in altaFlow**.



The **Apex Variables Settings** section will appear:

- For the Workflow ID (required field) → type: **String** → value: **workflow ID**.
- For the Document ID (required field) → type: **Field Reference** → value: **custom field where a dynamic document ID will be saved**



Activate/deactivate Salesforce users in altaFlow

Configuring this process will trigger the automatic activation/deactivation of Salesforce users in altaFlow.

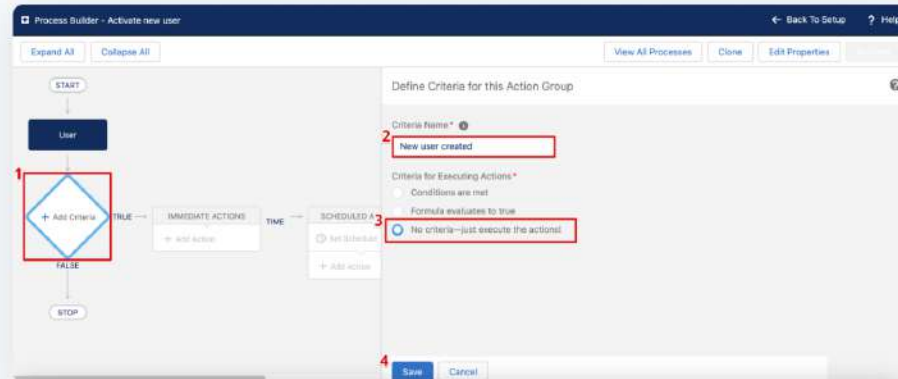
Let's consider a case where we need to activate a newly created Salesforce user or deactivate an inactive Salesforce user in altaFlow.



Note: When setting these processes, you can select any Salesforce object that has a user lookup.

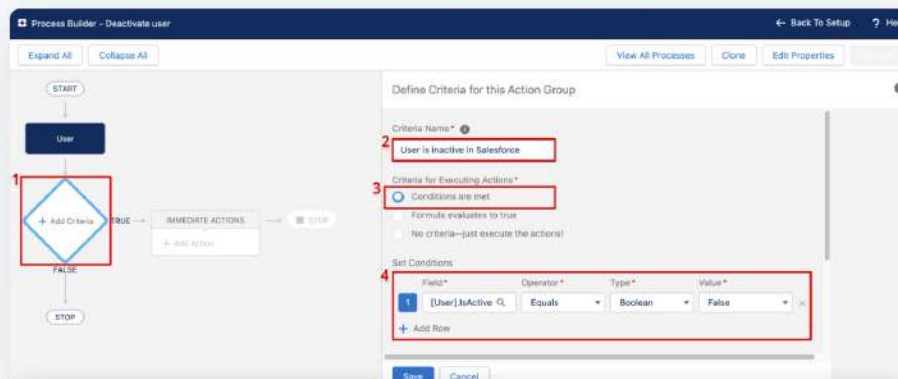
1. Enter a name for the criteria (for example **New user created** or **User is inactive in Salesforce**). Then, select the criteria you need to execute actions.

- To activate a new, user select **No criteria, just execute the action**



- To deactivate an existing user, select **Conditions are met**. Then, in the **Set Conditions** section, adjust the conditions that will trigger the user deactivation:

field: **Active** → operator: **Equals** → type: **Boolean** → value: **False**

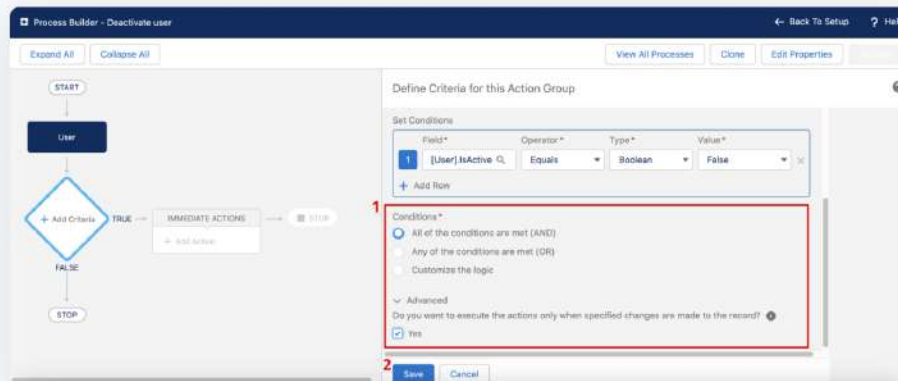


This will allow you to select the checkbox in the **Advanced Settings** if needed. For example, when you need to set a condition that will be triggered when the user's status changes to active/inactive.

To do so, select conditions (**All of the conditions are met (AND)** in the example). Next, in the **Advanced settings** section, select the **Yes** checkbox.

👉 If the **Advanced** section is missing, go back to the object settings and change the criteria for starting the process to **when a record is created or edited**.

Once finished, click **Save**.

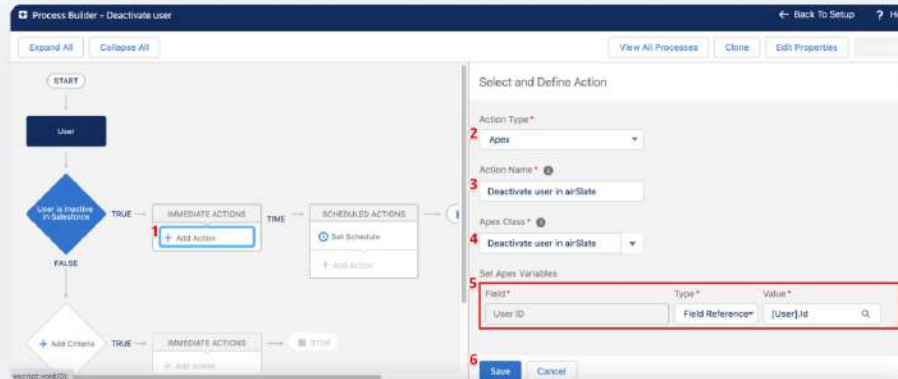


2. In the **Immediate Actions** section, enter the action name (for example **Activate/Deactivate user in altaFlow**).

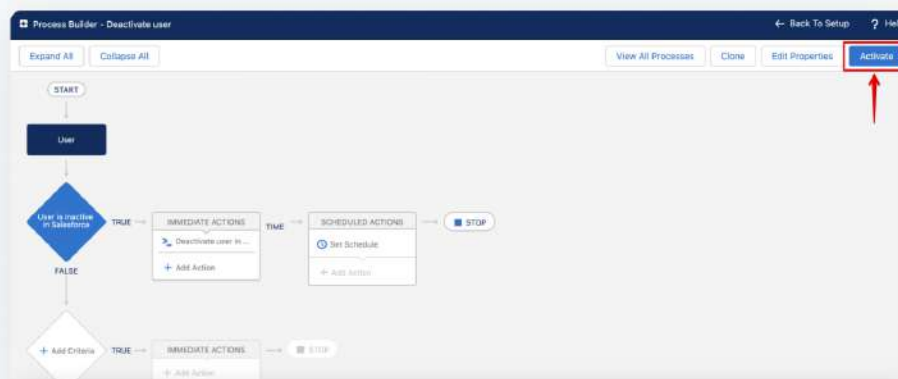
Select the Apex class you need for your process:

- Activate User in altaFlow
- Deactivate User in altaFlow

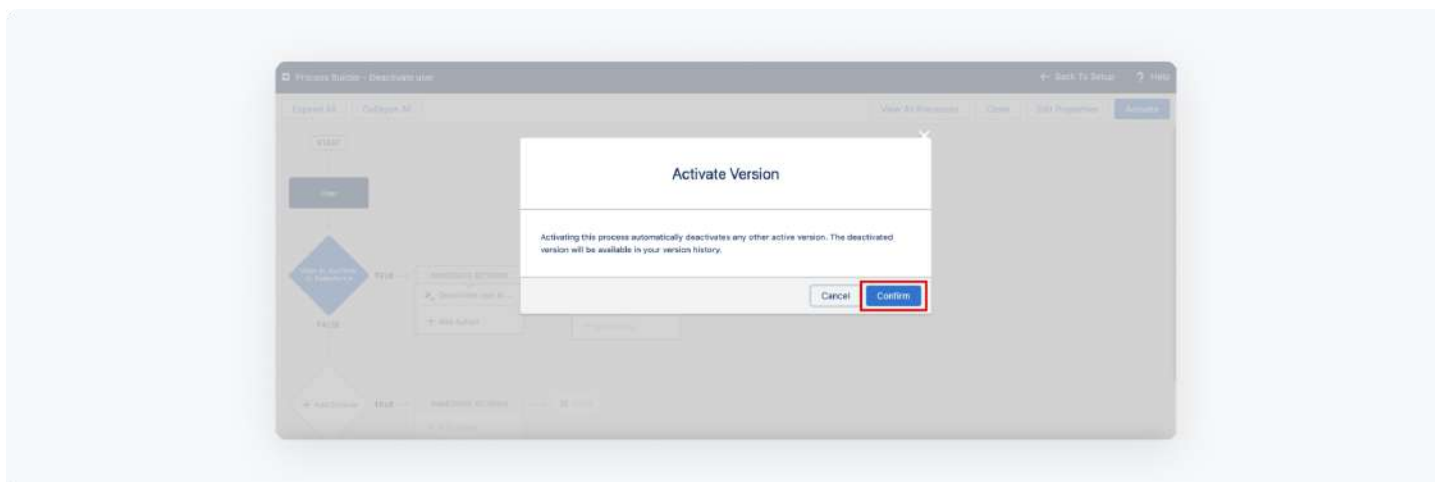
In the **Set Apex Variables** section, select user ID for the value. Once done, click **Save**.



To activate the Process Builder, select **Activate** on the Process Builder settings page.



In the **Activate Version** modal window, select **Confirm**.



Configure the Email to Salesforce functionality for altaFlow

altaFlow's [Email to Salesforce functionality](#) addresses the following use cases:

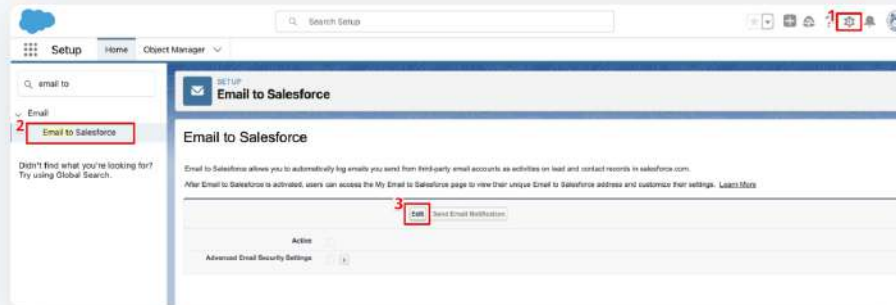
Case 1: I don't want to use altaFlow email notifications to send links to documents to my users. Can I get a link to a document that is included in the emails my users send?

Case 2: I want to store copies of emails sent from altaFlow in Salesforce records, is that possible?

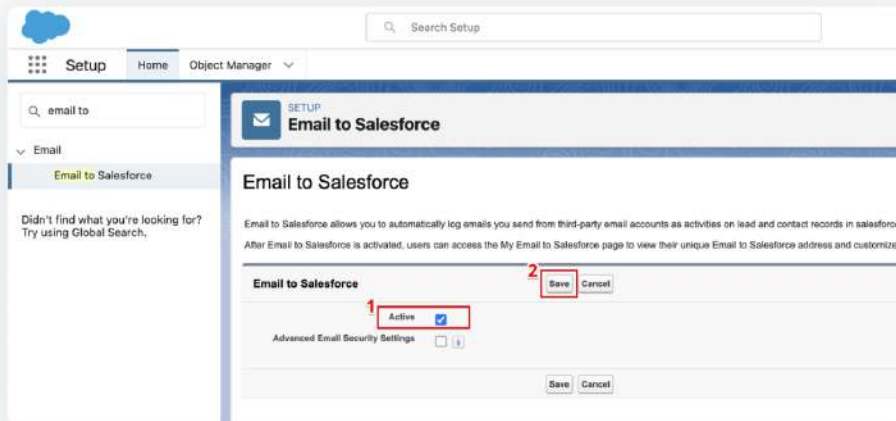
Case 3: Can I store links to create a revision in a Salesforce field, so that users can edit documents generated from Salesforce?

Follow the steps below to adjust the Email to Salesforce functionality within the altaFlow integration:

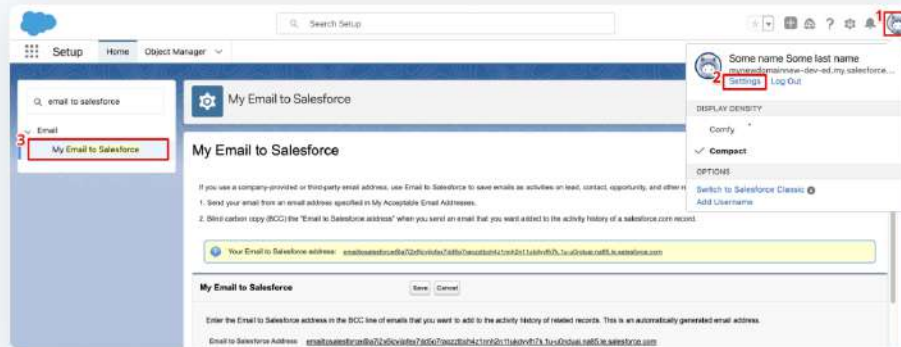
1. Navigate to **Setup** to activate the Email to Salesforce functionality. Then, search for **Email to Salesforce** in the Quick Find box. Once located, select **Edit**.



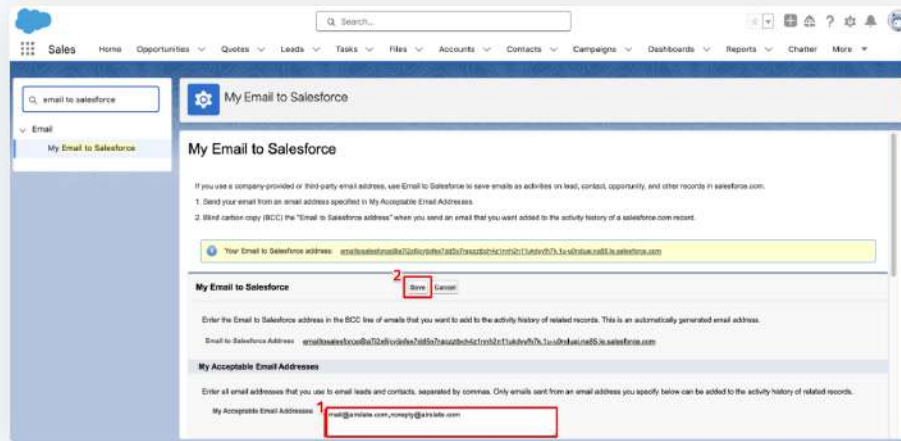
Activate the functionality by selecting the corresponding checkbox. Then, save your settings.



2. From your personal settings, enter *email to salesforce* in the Quick Find box. Then, select **My Email to Salesforce**.



Proceed to the **My Acceptable Email Addresses** section. Next, add the following emails divided by a comma with no space: docs@altaflow.com, noreply@altaflow.com. These emails are used by altaFlow to send the original email with a link to a document. Once finished, click **Save**.

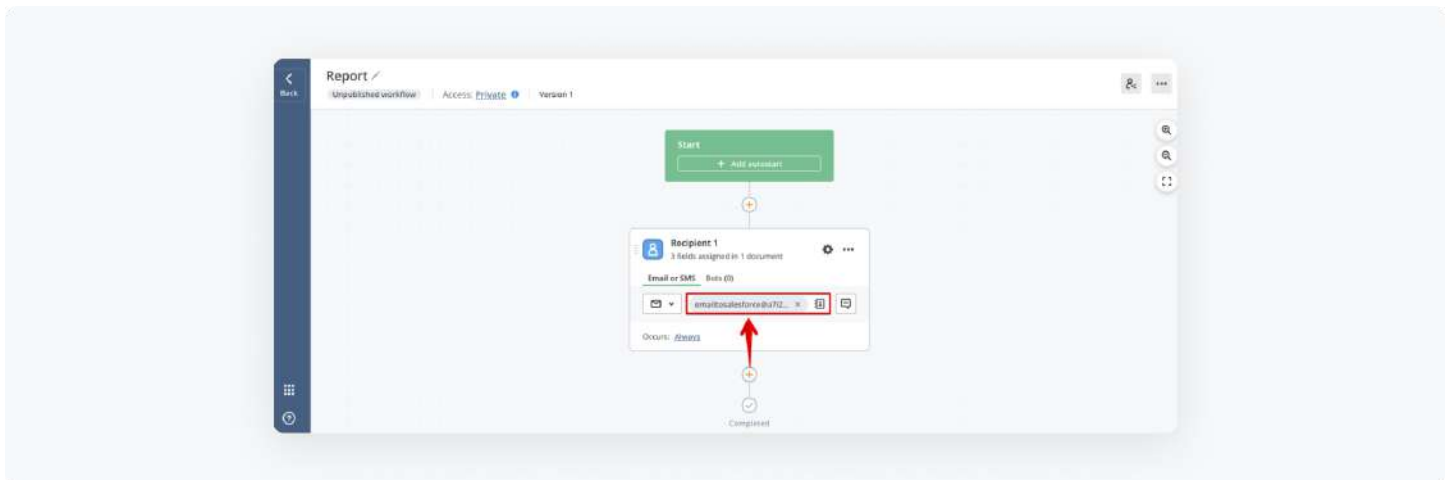


3. In altaFlow, create a new or select an existing workflow you want to configure the Email to Salesforce functionality for. At this step, you need a document with a hidden field where the record ID will be stored.

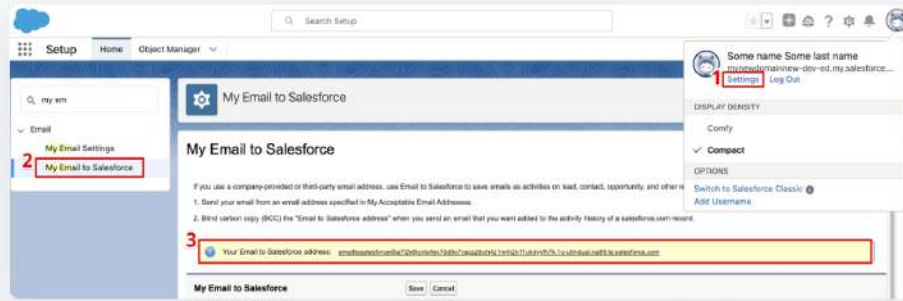
Tip: If no field to store the record ID in your workflow documents exists, you will need to create it. To add a hidden field, you can create a document with a hidden field (web form), or add a hidden document with the field to your workflow.

In the altaFlow workflow builder, add and configure the [Pre-fill from Salesforce records bot](#) to pre-fill the hidden field with the Salesforce starting record ID.

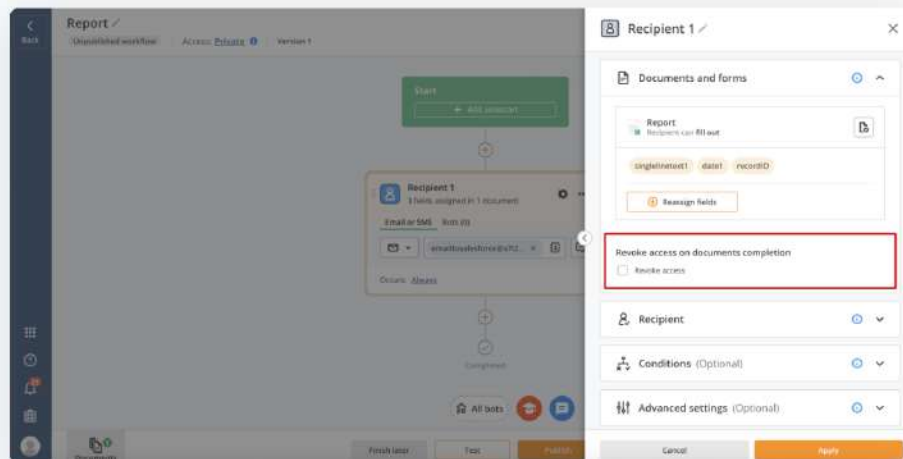
4. Add the Salesforce email address to step.



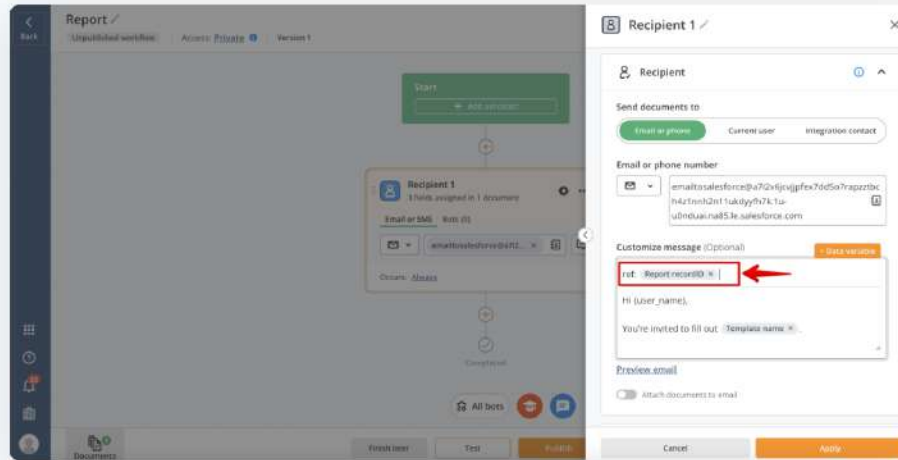
* To retrieve the Salesforce email, navigate to the **personal settings** → **My email to Salesforce**. Then, copy the email address link.



5. Proceed to the step settings by clicking the gear icon next to the step. In the **Document and forms** section, uncheck the **Revoke access checkbox**. This will allow recipients to open a document from Salesforce for editing via a link.

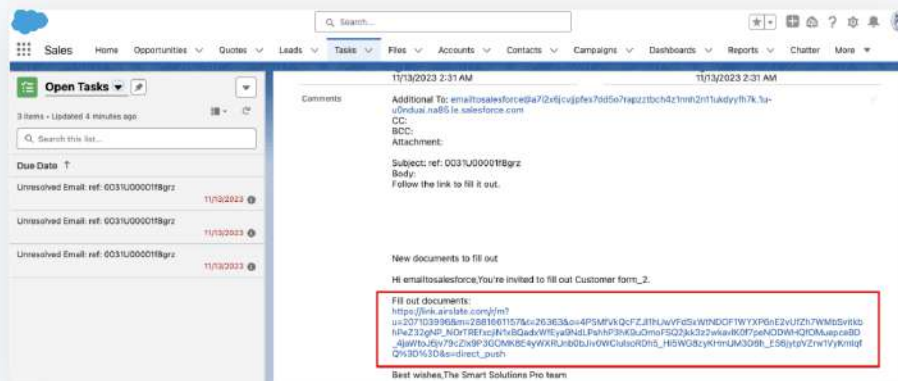


In the **Recipient** section, customize the email subject by adding **ref: recordID**. The **recordID** is a data variable where the Salesforce record ID is stored. Once done, click **Apply**.



Tip: To ensure that the document does not lock after filling for the first time via link from Salesforce, add one more step in the workflow builder without changing any default settings. This will allow for multiple revisions of the same document to be created.

Once the document is created from Salesforce (via an altaFlow custom button, Salesforce Flow, or Process), the record ID will be passed to the email subject. The email with the document link will be sent to a Salesforce email address. Salesforce logic will then create a Task object with the corresponding email.



If you need to take the URL from the Task and place it into a Salesforce field, you can use the following solution.

In this example, we take the URL from the Task and write this URL into the **FillOutLink__c** field in the object that has been specified in the email subject (**Contact** in our example).

👉 To create the **FillOutLink__c** field, navigate to **Object manager** → **Salesforce object** → **Fields & Relationships** → **New**.

The **FillOutLink__c** field should have a **Text Area (Long)** type with at least 350 characters allocated for it (because a normal text field will truncate the fill out link).



Note: If you use the Production environment, you won't be able to create Apex Classes directly in the Salesforce organization. In this case, you will need to use the Sandbox environment to deploy these Apex Classes from Sandbox to Production.

6. Now, proceed to adding new Apex Classes and Triggers.

1. Add TaskTriggerHandler (Apex Class):

To add a new Apex Class, go to **Setup** → **Apex Classes** → **New**.



Note: The **fillOutTitle** variable may change. If the trigger isn't working, check the created Task (you can find it under the starting record or in unresolved items) and put the title above the necessary link in the **fillOutTitle** variable.

The screenshot shows the Salesforce 'Open Tasks' page. On the left, there's a list of tasks with a search bar and a 'Due Date' filter. The main content area displays an email invitation from 'emailtosalesforce@...' with the subject 'ref: 0031U00001f8grz'. The email body contains the text 'New documents to fill out' and 'Hi emailtosalesforce, You're invited to fill out Customer form_2.' Below this, there's a red box highlighting the text 'Fill out documents:' followed by a long URL. A red arrow points to this text. The email also includes a 'Privacy Policy' link and a signature from 'The Smart Solutions Pro team'.

The screenshot shows the Salesforce 'Setup' page, specifically the 'Apex Classes' section. The class 'TaskTriggerHandler' is selected, and its details are shown. The class body is visible, and a red box highlights the text 'Fill out documents:' followed by a long URL. A red arrow points to this text. The class body also includes a 'public static final String ref = 'ref';' line.

```
public class TaskTriggerHandler {
    public static final String fillOutTitle = 'Fill out documents: ';
    public static final String ref = 'ref: ';
```

```

public static String getRefId(String subject) {
    Id refId = null;
    List<String> subjectFields = subject.split(' ');
    Boolean afterRef = false;
    for (String field : subjectFields) {
        if (field.startsWith(ref)) {
            afterRef = true;
        } else if (afterRef && (field instanceof Id)) {
            refId = field;
            break;
        }
    }
    return refId;
}

public static String getFillOutLink(Task t) {
    String fillOutLinkStart = 'https://link.airslate.com/r/m?';
    String fillOutLink = null;
    List<String> rows = t.Description.split('\n');
    Boolean afterFillOutTitle = false;
    for (String row : rows) {
        System.debug(row);
        if (row.startsWith(fillOutTitle)) {
            System.debug('row.startsWith(fillOutTitle)');
            afterFillOutTitle = true;
        } else if (afterFillOutTitle && row.startsWith(fillOutLinkStart)) {
            System.debug('afterFillOutTitle && row.startsWith(fillOutLinkStart)');
            row = row.replace('&', '&');
            fillOutLink = row;
            break;
        }
    }
}

```

```

    }
    return fillOutLink;
  }
}

```

2. Add Trigger:

To add a new trigger, go to **Setup** → **Triggers**.

```

trigger TaskTrigger on Task (before insert) {
  Map<Id, String> refIdsToLinks = new Map<Id, String>();

  for (Task t : Trigger.new) {
    if (String.isNotBlank(t.Description)
        && t.Description.contains(TaskTriggerHandler.fillOutTitle)
        && String.isNotBlank(t.Subject)
        && t.Subject.contains(TaskTriggerHandler.ref)) {
      System.debug(t.Description);
      String fillOutLink = TaskTriggerHandler.getFillOutLink(t);
      Id refId = TaskTriggerHandler.getRefId(t.Subject);
      if (String.isNotBlank(fillOutLink) && refId != null) {
        refIdsToLinks.put(refId, fillOutLink);
      }
    }
  }

  List<Contact> toUpdate = [SELECT Id FROM Contact WHERE Id IN :refIdsToLinks.keySet()];
  for (Contact contact : toUpdate) {
    contact.FillOutLink__c = refIdsToLinks.get(contact.Id);
  }
  update toUpdate;
}

```

3. Add TaskTriggerHandlerTest (Apex class):

```
@IsTest
private class TaskTriggerHandlerTest {
    @IsTest
    private static void test_getRefId() {
        Contact testContact = new Contact(LastName = 'Contact');
        insert testContact;

        String subject = TaskTriggerHandler.ref + ' ' + testContact.Id;
        String refId = TaskTriggerHandler.getRefId(subject);
        System.assertEquals(testContact.Id, refId);
    }

    @IsTest
    private static void testTrigger() {
        Contact testContact = new Contact(LastName = 'Contact');
        insert testContact;

        String toCheckLink = 'https://link.airslate.com/r/m?test';

        Task testTask = new Task(
            Subject = TaskTriggerHandler.ref + ' ' + testContact.Id,
            Description = 'Some description\n'
            + '\n'
            + TaskTriggerHandler.fillOutTitle + '\n'
            + toCheckLink + '\n'
            + 'Cheers!'
        );
        insert testTask;

        testContact = [SELECT FillOutLink__c FROM Contact WHERE Id = :testContact.Id];
        System.assertEquals(toCheckLink, testContact.FillOutLink__c);
    }
}
```



Use altaFlow Apex Actions in custom Apex code

Refer to the information below to learn how to use Apex actions in custom **Apex** code along with the examples.

Apex Class Names matching:

Apex Class label	Apex Class name
Run workflow	ProcessToFlowController
Create document revision in altaFlow	CreateRevisionProcessToFlowController
Complete document revision in altaFlow	FinishRevisionProcessToFlowController
Delete documents in altaFlow	DeleteSlatesProcessToFlowController
Activate user in altaFlow	ActivateUserProcessToFlowController
Deactivate user in altaFlow	DeactivateUserProcessToFlow Controller

Apex Variables matching:

Apex Variable Label	Apex Variable Name
Record ID	recordId
Workflow ID	flowId
Document ID	slateId
Step Name	stepName
User ID	userId

To build the custom Apex code, select the class you need using **{{className}}**. Then, select its corresponding variables.

Use the template below:

```
pdffiller_sfree.{{className}}.requestObject request = new  
pdffiller_sfree.{{className}}.requestObject();  
  
request.{{variableName1}} = 'value1';  
  
request.{{variableName2}} = 'value2';  
  
pdffiller_sfree.{{className}}.runFlow(new  
List<pdffiller_sfree.{{className}}.requestObject>{request});
```

Example 1: Run workflow Apex Action

```
pdffiller_sfree.{{className}}.requestObject request = new  
pdffiller_sfree.{{className}}.requestObject();  
  
request.{{variableName1}} = 'value1';  
  
request.{{variableName2}} = 'value2';  
  
pdffiller_sfree.{{className}}.runFlow(new  
List<pdffiller_sfree.{{className}}.requestObject>{request});
```

Example 2: Activate user in altaFlow Apex Action

```
pdffiller_sfree.ActivateUserProcessToFlowController.requestObject request = new  
pdffiller_sfree.ActivateUserProcessToFlowController.requestObject();  
  
request.userId = '0058B000001ivl4QAA';  
  
pdffiller_sfree.ActivateUserProcessToFlowController.runFlow(new  
List<pdffiller_sfree.ActivateUserProcessToFlowController.requestObject>{request});
```

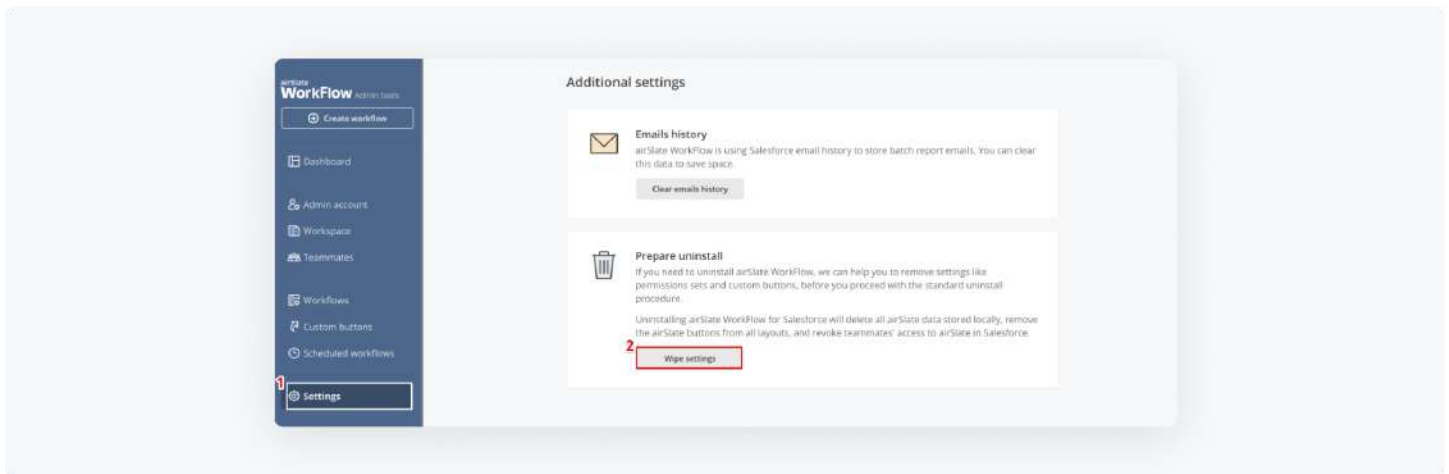
Uninstall

Follow these steps to completely uninstall altaFlow from your Salesforce organization.

1. In Salesforce, proceed to the **App Launcher** and select **altaFlow Admin Tools**.

You can also navigate to the **Installed Packages** section and select **Configure** next to the altaFlow package. This will open the altaFlow Admin Tools.

2. Skip to the **Settings** tab and select **Wipe settings** to remove altaFlow from all Layouts and revoke teammate access to altaFlow in Salesforce.



Note: Any existing processes set up in the Process Builder will need to be manually deleted prior to uninstalling the altaFlow package.

3. Provide your thoughts on how to improve the altaFlow application in the **Uninstall survey** modal window (this is optional).

Click **Submit & uninstall** to proceed.

Uninstall survey

Tell us about your experience with airSlate. Have any idea how can we do better? Drop us a line below.

your feedback here

Cancel

Submit & uninstall

4. You'll be redirected to the **Installed Packages** page. Select **Uninstall** next to your altaFlow package.

Quick Find / Search...

Expand All Collapse All

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce

Get Started

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Manage Apps

Manage Territories

Advanced Profiles

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installed Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Installed Packages

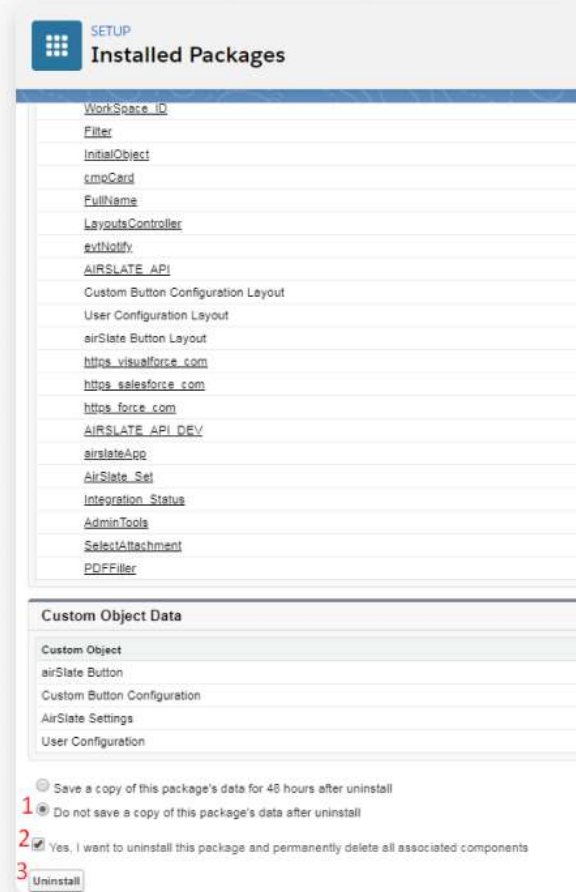
Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date
Uninstall Configure Manage Licenses	DocuSign Enterprise	DocuSign	4.0	pdfblar_sf	Expired	Unlimited	5		11/6/2020
Uninstall	Salesforce Connected App	Salesforce.com	1.7	sf_scm_apps	Free	N/A	N/A	N/A	N/A
Uninstall	airSlate Workflow	airSlate	3.57	pdfblar_sf	Active	Unlimited	0		Does not Expire

5. Scroll down to the bottom of the **Uninstall a Package** page and select **Do not save a copy of this package data after uninstall**. Then, select the **Yes, I want to uninstall this package** checkbox.

Then, click **Uninstall**.

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6. The **Installed Packages** page will open.

On this step, the altaFlow package may still remain in the **Installed Packages** section. The **Delete** button in the Action column of the **Uninstalled Packages** section may not appear. At this step, it is possible to cancel a package uninstallation.

Installed Packages

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Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations
Uninstall Configure Manage Licenses	PDFfiller Enterprise	PDFfiller	4.0	pdfiller_sf	Expired	Unlimited	5	☐
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	Free	N/A	N/A	N/A
Manage Licenses	airState Workflow	airState	3.57	pdfiller_sftee	Active	Unlimited	0	☐
Uninstall	SignNow	SignNow	1.279	code_signnow	Free	N/A	N/A	N/A

Uninstalled Packages

Action	Package Name	Namespace	Expiration Date	Uninstall Status
Cancel	airState Workflow (Version Name: January Apex)	pdfiller_sftee	1/26/2024 12:43 PM	Requested Uninstall

Wait until the altaFlow package has been completely moved from the **Installed Packages** section to the **Uninstalled Packages** section (it may take several minutes and require refreshing the page).

Select **Delete** in the Action column.

Installed Packages

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your Salesforce.com environment. [Learn More about Installing Packages](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

Action	Package Name	Publisher	Version Number	Namespace Prefix	Status	Allowed Licenses	Used Licenses	Enabled for Platform Integrations	Expiration Date
Uninstall Configure Manage Licenses	PDFfiller Enterprise	PDFfiller	4.0	pdfiller_sf	Expired	Unlimited	5	☐	11/6/2020
Uninstall	Salesforce Connected Apps	Salesforce.com	1.7	sf_com_apps	Free	N/A	N/A	N/A	N/A
Uninstall	SignNow	SignNow	1.279	code_signnow	Free	N/A	N/A	N/A	N/A

Uninstalled Packages

Action	Package Name	Namespace	Expiration Date	Uninstall Status	Components Uninstalled
Delete	airState Workflow (Version Name: January Apex)	pdfiller_sftee	1/26/2024 12:43 PM	Uninstall Complete	224 / 224

Confirm your action by clicking **OK** in the pop-up. The altaFlow app will now be completely uninstalled from your Salesforce organization.

Troubleshooting

Change a Salesforce user's email that has been already activated in altaFlow

Follow the steps below to change a Salesforce user's email that has been already activated in altaFlow:

1. In Salesforce, go to the **altaFlow Admin Tools** and skip to the **Teammates** tab. Then, block the teammate you need.
2. In Salesforce, search for the **Users** section. Then, change the user's email.
3. Next, return to the altaFlow **Admin Tools** and in the **Teammates** tab, activate the teammate with the new email.

To change your own email in Salesforce (for users without administrator privileges in altaFlow Admin Tools), please contact your Administrator to perform the steps above.

To change your own email in Salesforce (for users with administrator privileges in altaFlow Admin Tools), follow these steps:



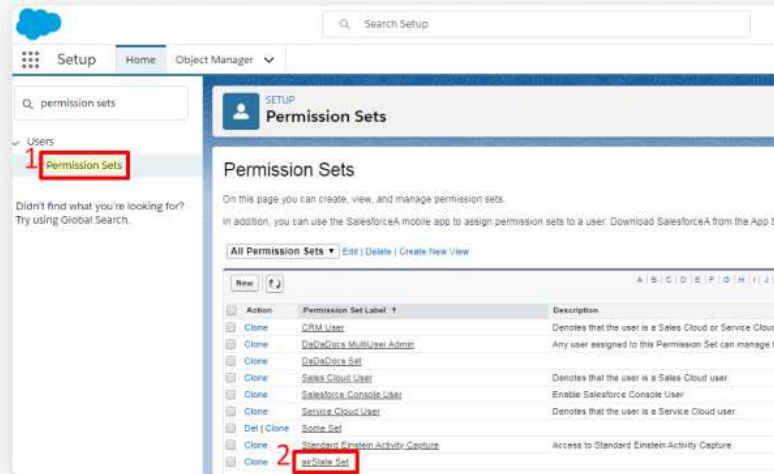
Note: be sure the new email has been assigned the **Workspace Admin** or **Supervisor** role.

1. Navigate to the altaFlow **Admin Tools** and skip to the **Admin Account** tab. Then, click **Disconnect**.
2. In Salesforce, search for the **Users** section. Then, change your email.
3. Go back to the **altaFlow Admin Tools** and in the **Admin Account** tab, log in with the new email.

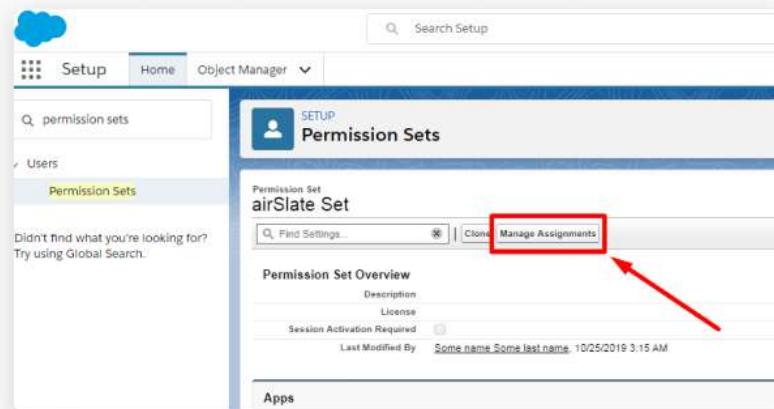
Failed to access altaFlow Admin Tools

If you're not authorized to access altaFlow Admin Tools in Salesforce, follow the steps below to assign an altaFlow set:

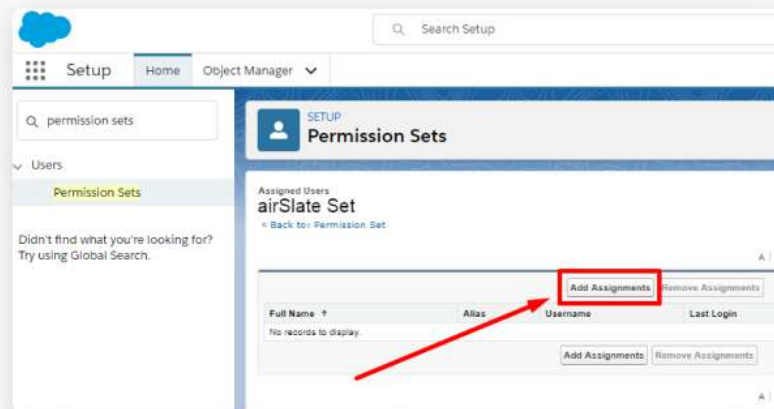
1. In the quick find, search for **Permission Sets**. Then, click it in the search result. In the **Permission Sets** section, select **altaFlow Set**.



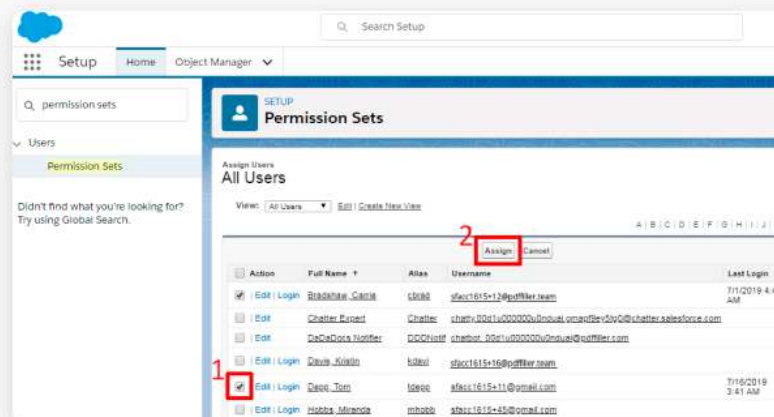
2. In the next window, select **Manage Assignments**.



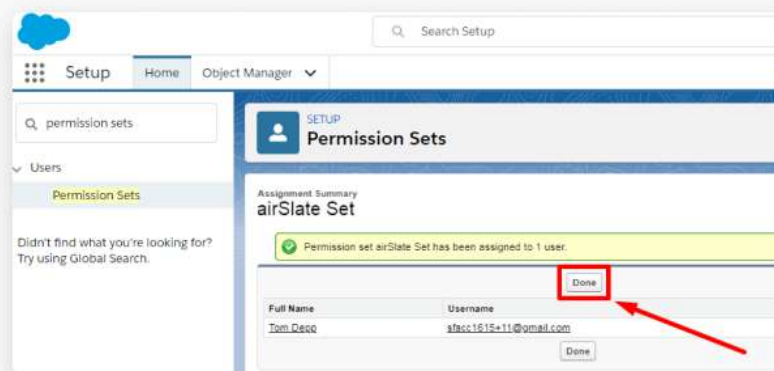
3. Next, select **Add Assignments**.



4. Select the checkbox next to the user you want to assign an altaFlow set to and click **Assign**.



5. Once finished, you'll get a notification that an altaFlow Set has been successfully assigned to the selected user, click **Done**.

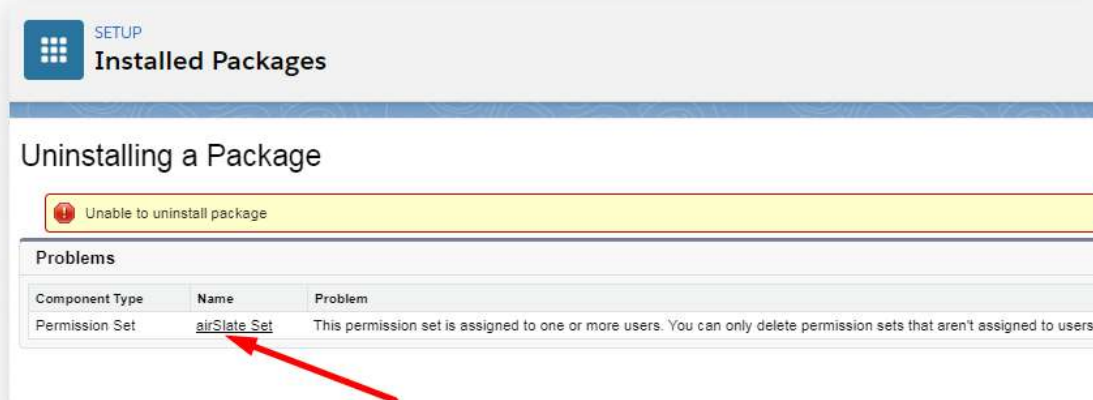


Now you can proceed back to the **Admin Tools** tab.

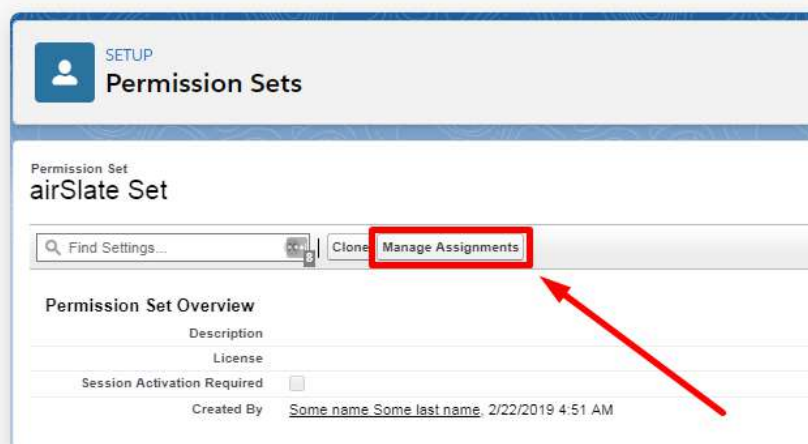
Failed to uninstall altaFlow due to a permission set

If the uninstallation fails due to assigned altaFlow permission sets, remove the assigned sets manually and repeat the uninstallation process.

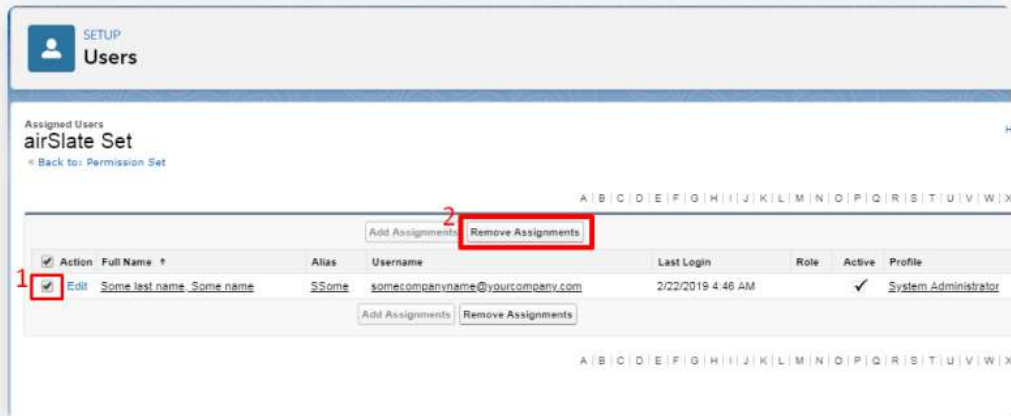
1. Click the name of an assigned permission set.



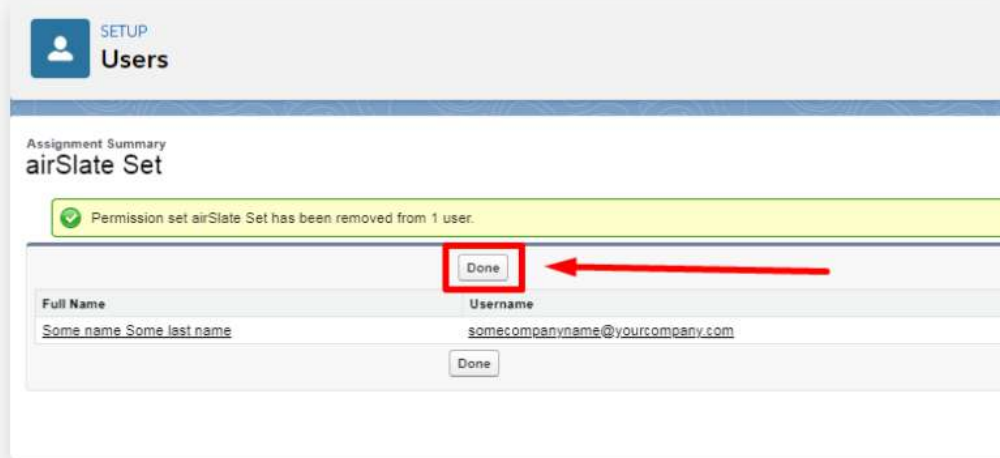
2. In the **Permission Sets** section, select **Manage Assignments**.



3. Select the checkbox next to the user you want to remove assignments of the altaFlow set from and click **Remove Assignments**.



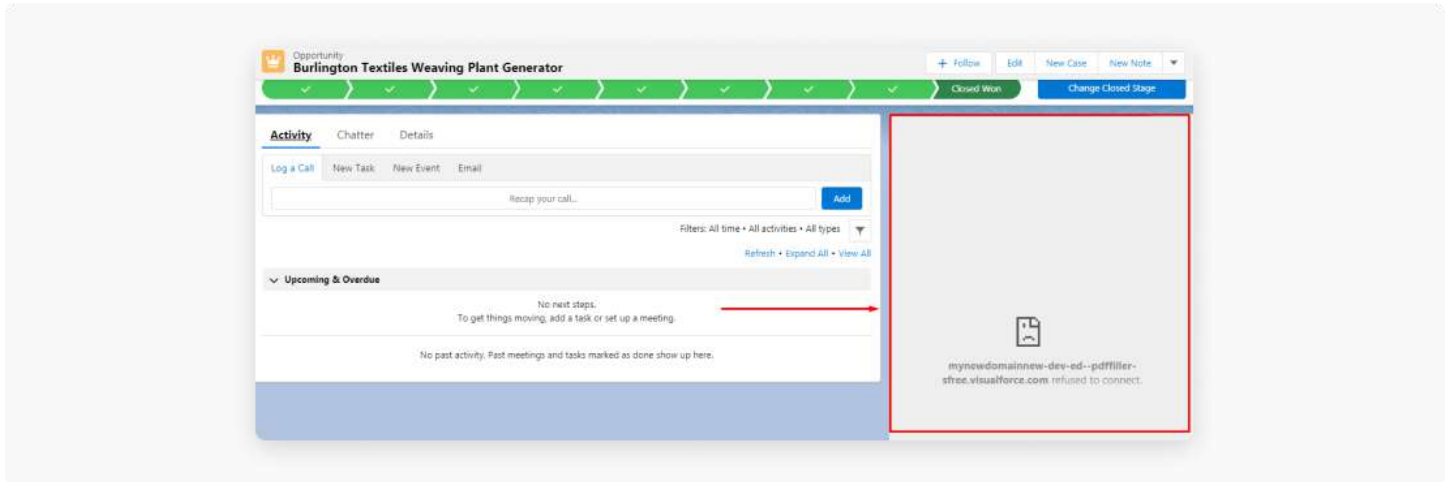
4. When finished, you will see a notification that the altaFlow Set has been successfully removed from the selected user. Click **Done**.



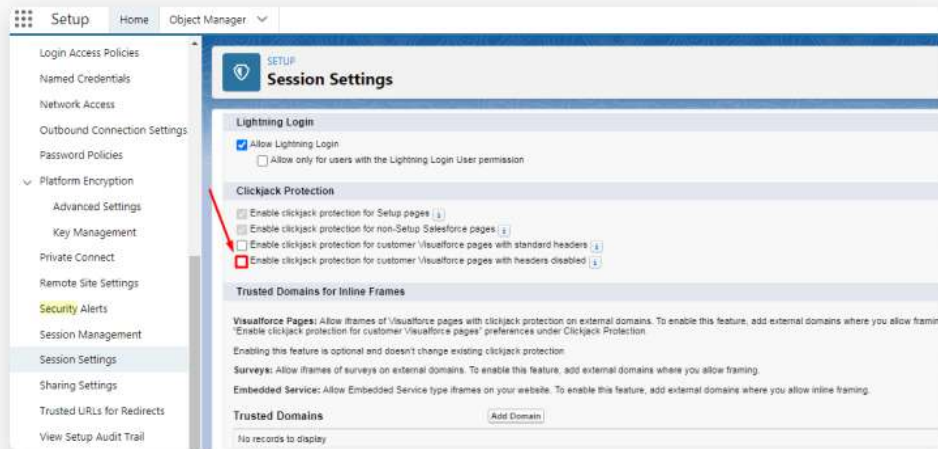
Now you can proceed with completing the uninstallation.

Visualforce refuses to connect in Salesforce Visualforce page

If the altaFlow Lightning component refuses to connect and is highlighted in a grey color with the following text: **[domain name] refused to connect**, follow the steps below to resolve the issue.



1. On the Salesforce main page, go to **Setup** and search for **Security**. Then, in the **Security** section, select **Session Settings**.
2. Scroll down to the **Clickjack Protection** section. Then, uncheck the **Enable clickjack protection for customer Visualforce pages with headers disabled** checkbox. Once finished, save your settings.

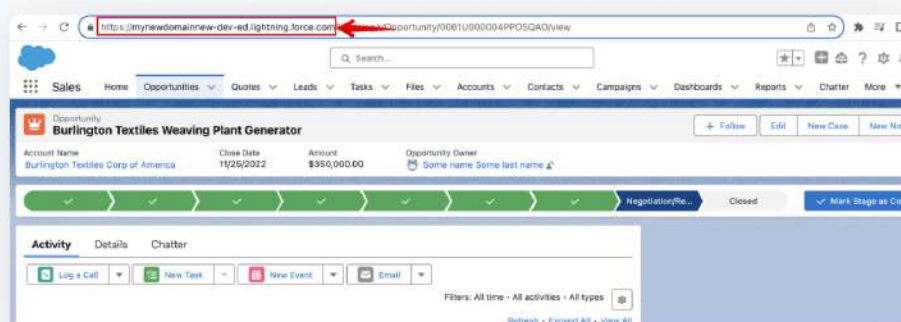


If you want to leave the **Enable clickjack protection for customer Visualforce pages with headers disabled** checkbox checked for security reasons, follow these steps:

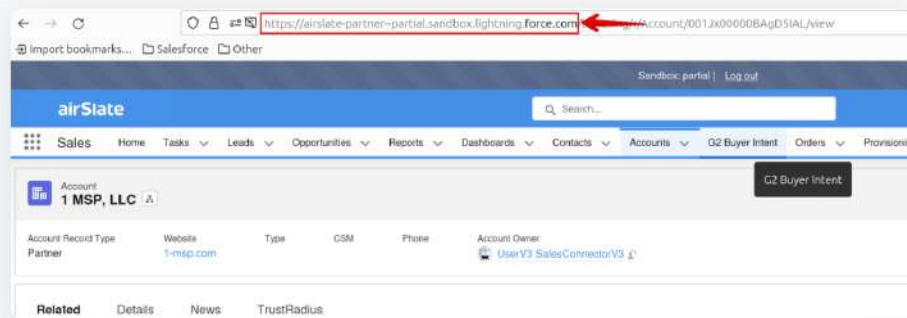
1. On the Salesforce main page, go to **Setup** and search for **Security**. Then, in the **Security** section, select **Session Settings**.
2. Scroll down to the **Trusted Domains for Inline Frames** section. Then, click **Add Domain**.
3. For the **IFrame Type** select **Visualforce Pages**. For the **Domain**, enter your Salesforce lightning domain in the following format : `https://your_salesforce_domain.lightning.force.com`

To retrieve your domain, copy it from your organization link in the following format:

- when in the Production environment



- When in the Sandbox environment



altaFlow Admin Tools aren't working properly on Sandbox

In the case of a Sandbox being created from a production instance, where the altaFlow app has already been installed, you may encounter the following issues:

- unable to connect an altaFlow admin account
- unable to connect a Workspace, even after connecting an admin account

Follow the steps below to correct your altaFlow app's compatibility with Salesforce Sandbox:

1. Go to **Setup** and search for **Custom Settings**.
2. Select **altaFlow settings** → **Manage** → **Edit**.
3. Then, delete values for **InstallationUser_ID**, **WorkSpace_ID**, and **WorkSpace Subdomain**. Once done, click **Save**.

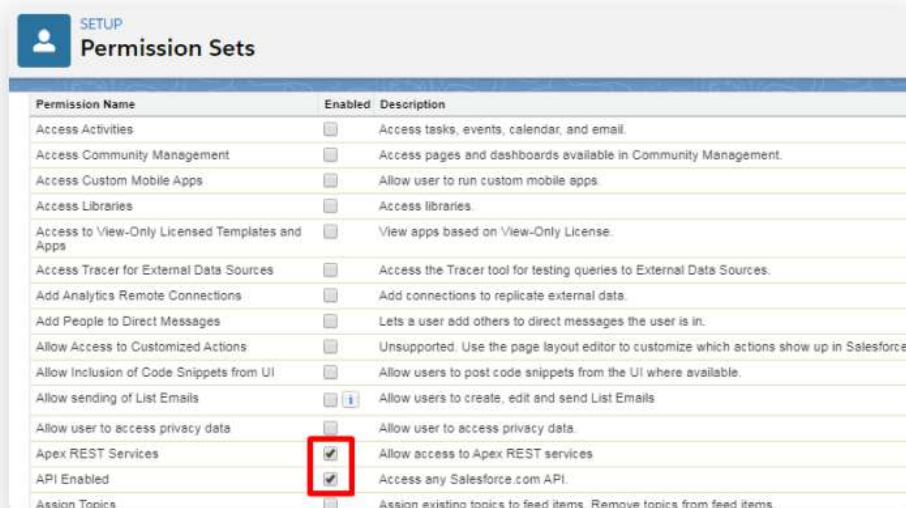
altaFlow custom button issues with Digital Experience sites

Digital Experience site users may encounter issues when using altaFlow custom buttons.

The issue may be caused by disabled permissions such as **API Enabled** and **Apex REST Services**.

To enable them, proceed to **System Permissions / Administrative Permissions** in Permission Sets or User Profiles.

Then, select the checkboxes next to **Apex REST Services** and **API Enabled**.

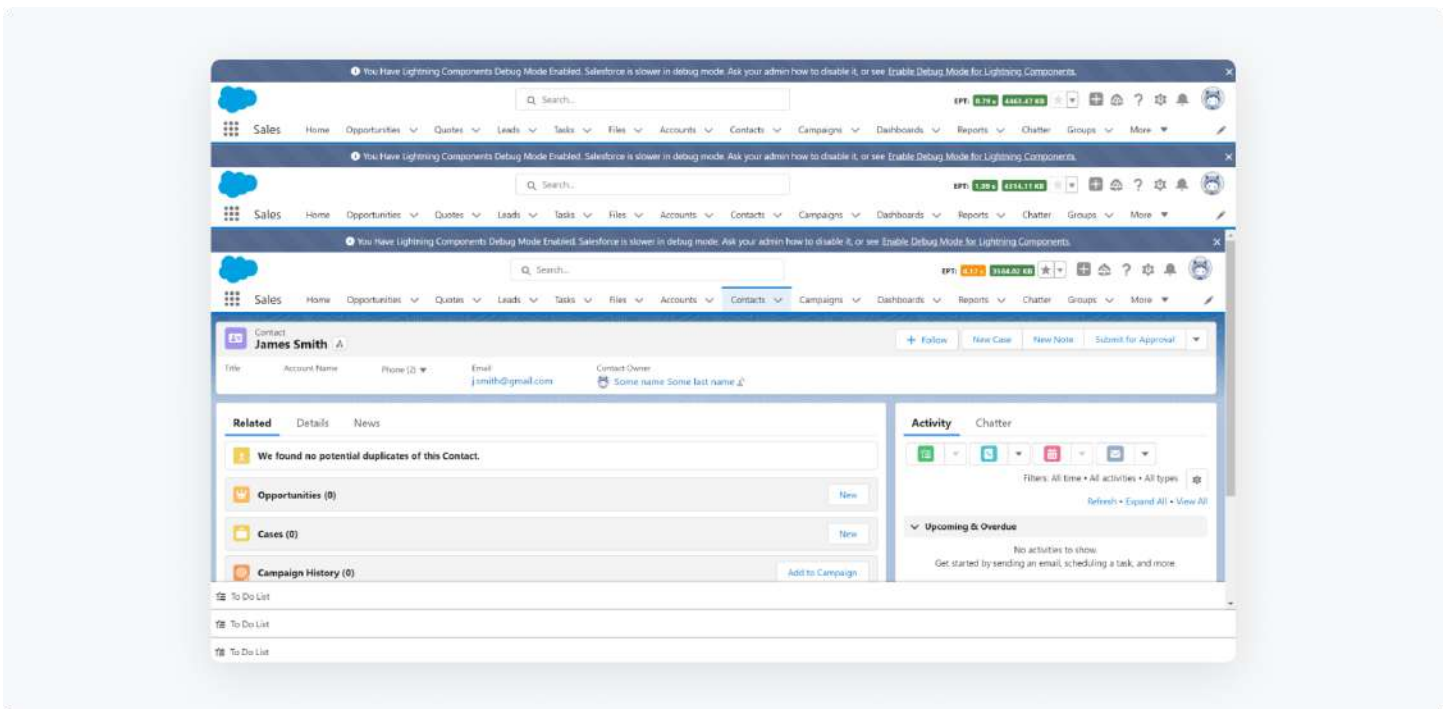


Permission Name	Enabled	Description
Access Activities	☐	Access tasks, events, calendar, and email.
Access Community Management	☐	Access pages and dashboards available in Community Management.
Access Custom Mobile Apps	☐	Allow user to run custom mobile apps.
Access Libraries	☐	Access libraries.
Access to View-Only Licensed Templates and Apps	☐	View apps based on View-Only License.
Access Tracer for External Data Sources	☐	Access the Tracer tool for testing queries to External Data Sources.
Add Analytics Remote Connections	☐	Add connections to replicate external data.
Add People to Direct Messages	☐	Lets a user add others to direct messages the user is in.
Allow Access to Customized Actions	☐	Unsupported. Use the page layout editor to customize which actions show up in Salesforce.
Allow Inclusion of Code Snippets from UI	☐	Allow users to post code snippets from the UI where available.
Allow sending of List Emails	☐	Allow users to create, edit and send List Emails
Allow user to access privacy data	☐	Allow user to access privacy data.
Apex REST Services	☒	Allow access to Apex REST services
API Enabled	☒	Access any Salesforce.com API.
Assign Topics	☐	Assign existing topics to feed items. Remove topics from feed items.

Click **Save** to keep your settings.

Salesforce pages may overlay after clicking altaFlow custom buttons

In some cases, users may encounter an issue with Salesforce pages overlaying. This occurs when using an altaFlow custom button to create a document and clicking **Back to record** before the document opens in a new tab.



This issue can occur when the **Debug Mode** is enabled for Lightning Components. To resolve the issue, follow the instructions on how to [disable the Debug Mode](#).

altaFlow custom buttons failed to be created

If users encountered a failure when creating custom buttons in the altaFlow Admin Tools, check whether the **Use Any API Client** permission is available for the user's profile. If the **Use Any API Client** permission is available, enable it.



If users have standard profiles, create a **Permission Set** with this permission and assign it to users who need to use the altaFlow Admin Tools.

altaFlow custom buttons aren't working properly on Sandbox

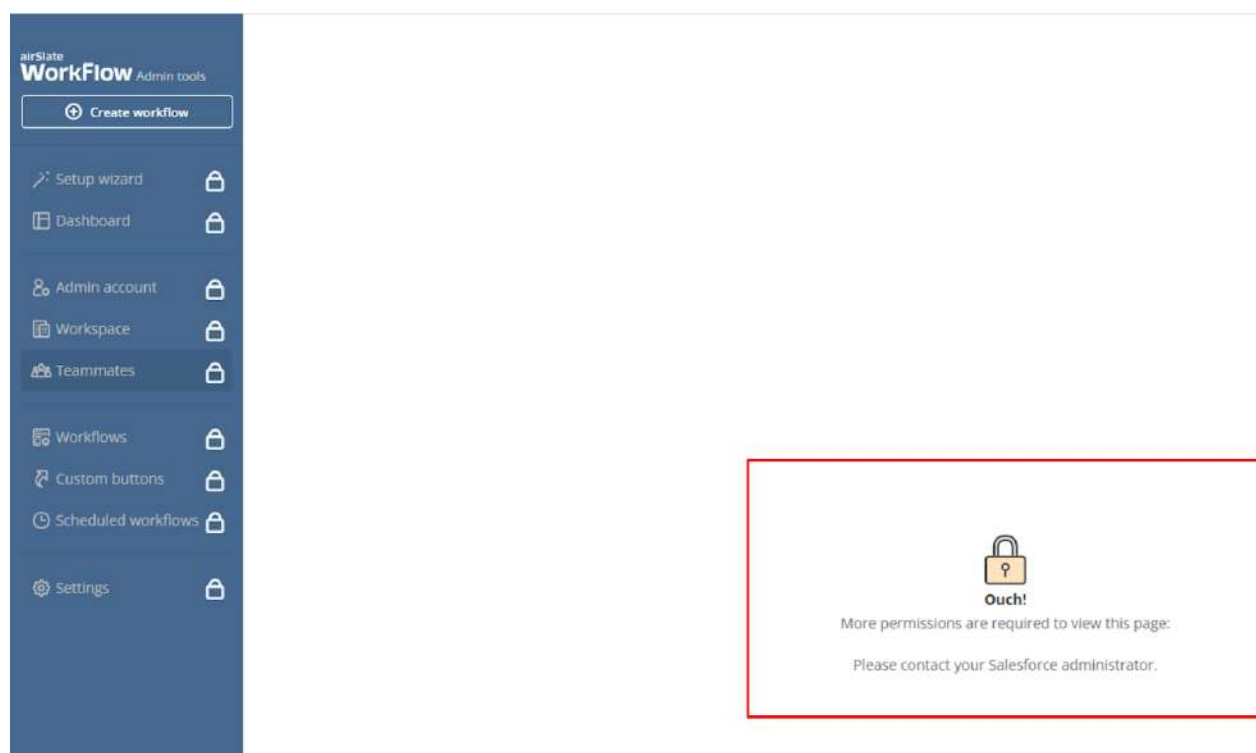
In the case of a Sandbox being created from a production instance, where the altaFlow app has already been installed, you may encounter the following issues:

- custom buttons that have been created in production environment don't display in the **Custom buttons** tab of Admin Tools in Salesforce
- custom buttons that have been created in production environment fail when using them on layouts or lists

To solve this issue it is required to create a custom button from scratch in the **Custom buttons** tab of Admin Tools in Salesforce.

Workspace fails to connect/More permissions required

Users may encounter errors when attempting to integrate altaFlow workflows with Salesforce, such as workspace connection failure due to insufficient permissions.



Reason

The error occurs because Salesforce limits the number of API requests allowed in a 24-hour period. When this limit is exceeded, the integration fails to connect.

Solution

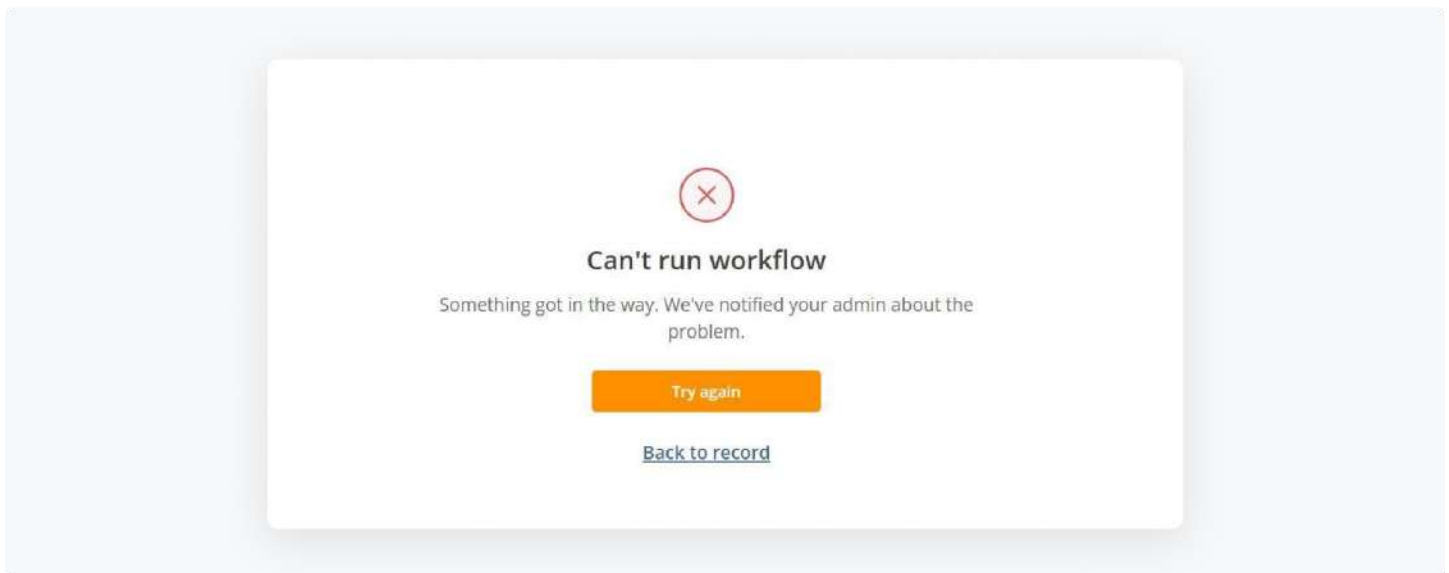
Check for API Request Limits:

1. Navigate to **System Overview** in Salesforce **Setup**.
2. Review the **API Usage** section to check if the request limit has been exceeded.
3. If limits are exceeded:
 - Wait until the limit resets.
 - Contact Salesforce Support to request an increased API quota.

Can't Run Workflow error message

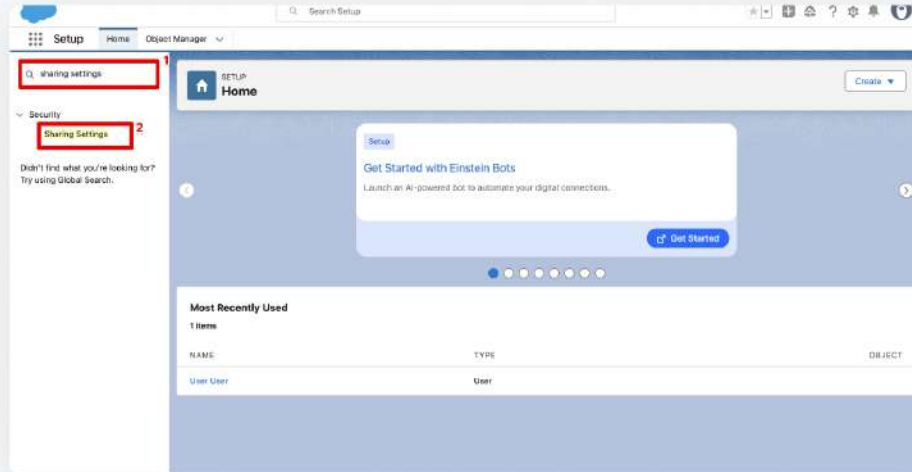
The error occurs **only for Salesforce Experience Cloud users** when they attempt to run a workflow but lack access to the custom button or components in the altaFlow App.

It is caused by **restricted sharing settings** on the altaFlow Button custom object, preventing visibility to external users.

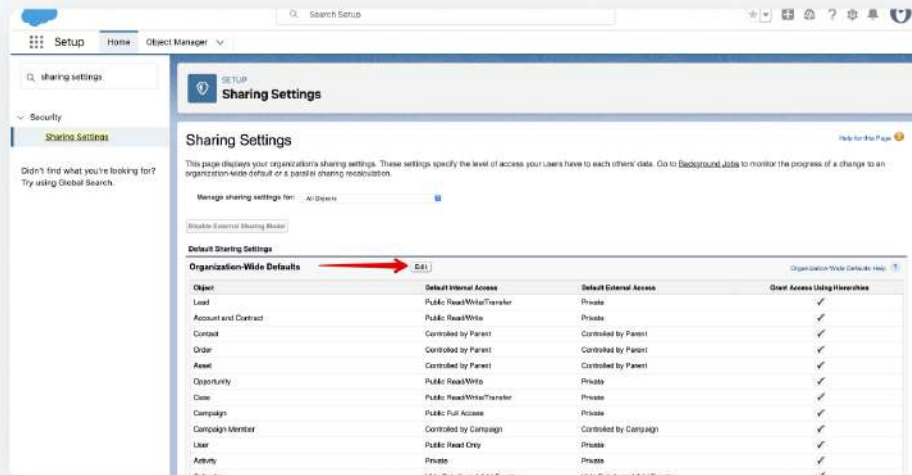


Solution:

1. Go to **Setup** in Salesforce.
2. Search for **Sharing Settings**.



3. Click **Edit**.



4. Find the object: **altaFlow Button** and set the Default External Access option to **Public Read Only**. Click **Save**.

