



SOLUNUS
Enabling Customer Success

FLOW ALERT

(User Manual – Part 2)



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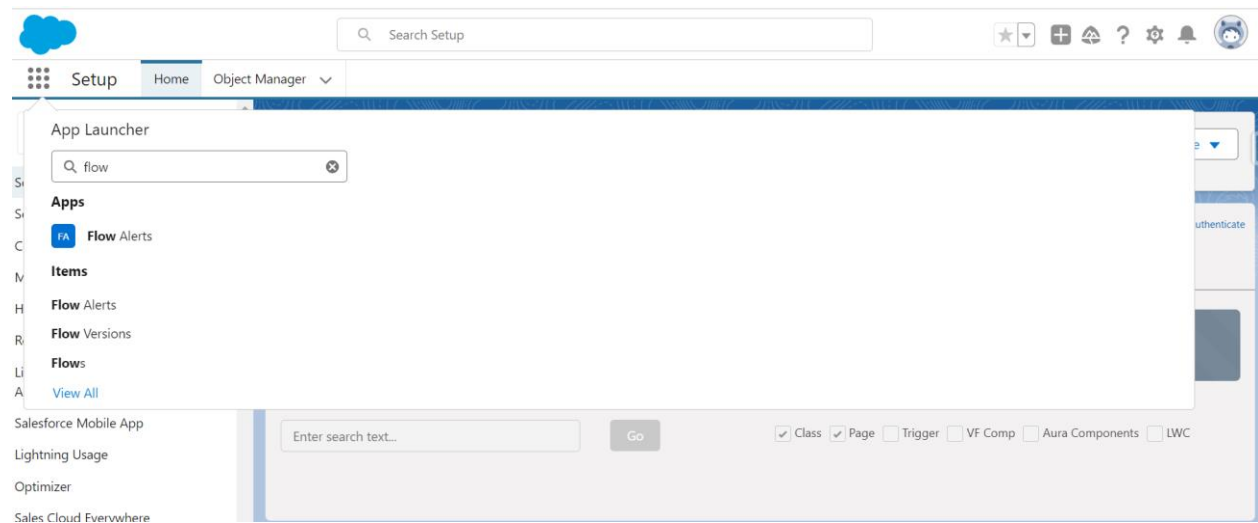
CREATE FLOW ALERTS

NAVIGATE TO FLOW ALERT APPLICATION:

When in your salesforce org, navigate to the Flow Alerts Application. To do that -

1. Open the App Launcher:

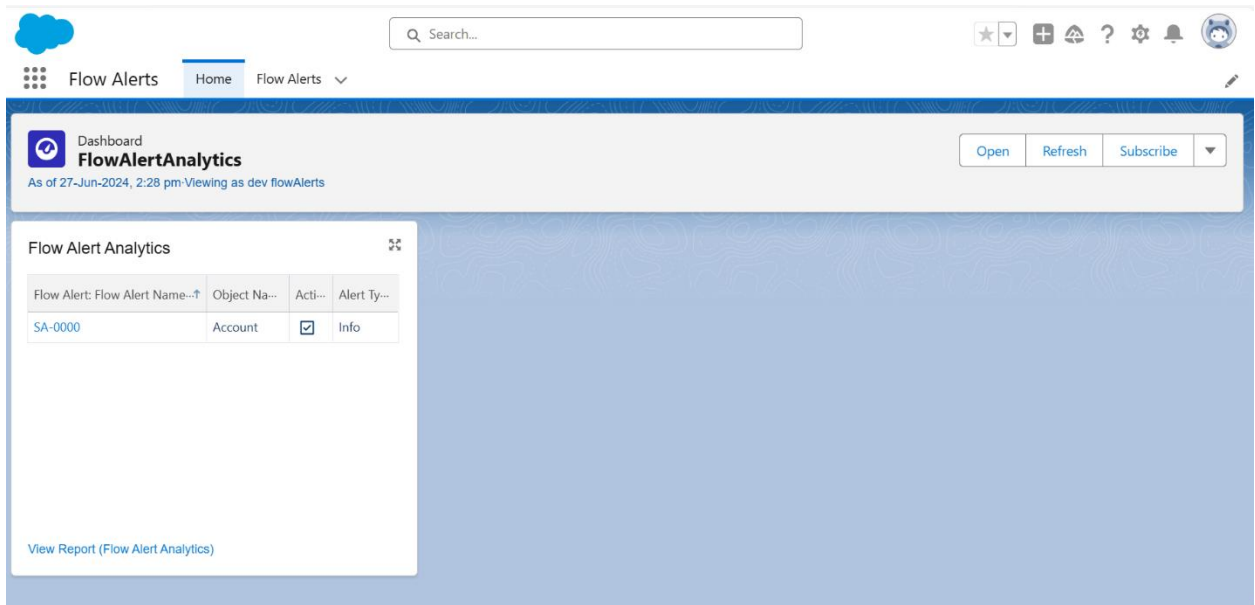
In the top-left corner of the Salesforce interface, click on the App Launcher icon (Nine dots).



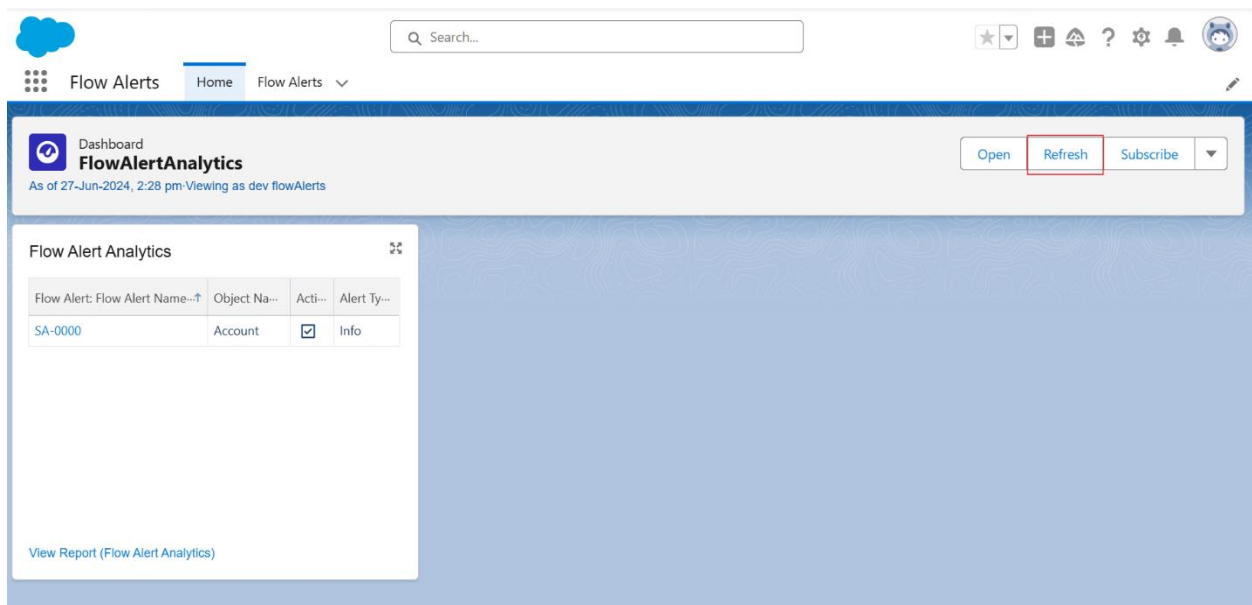
2. Search for Flow Alerts: In the App Launcher search bar, type "Flow Alerts".
3. Select the Flow Alerts Tab: Click on the Flow Alerts option from the search results. This will take you to the Flow Alerts application.

HOME TAB

The Flow Alert homepage provides comprehensive analytics on record counts and object names, offering valuable insights into your Salesforce environment.

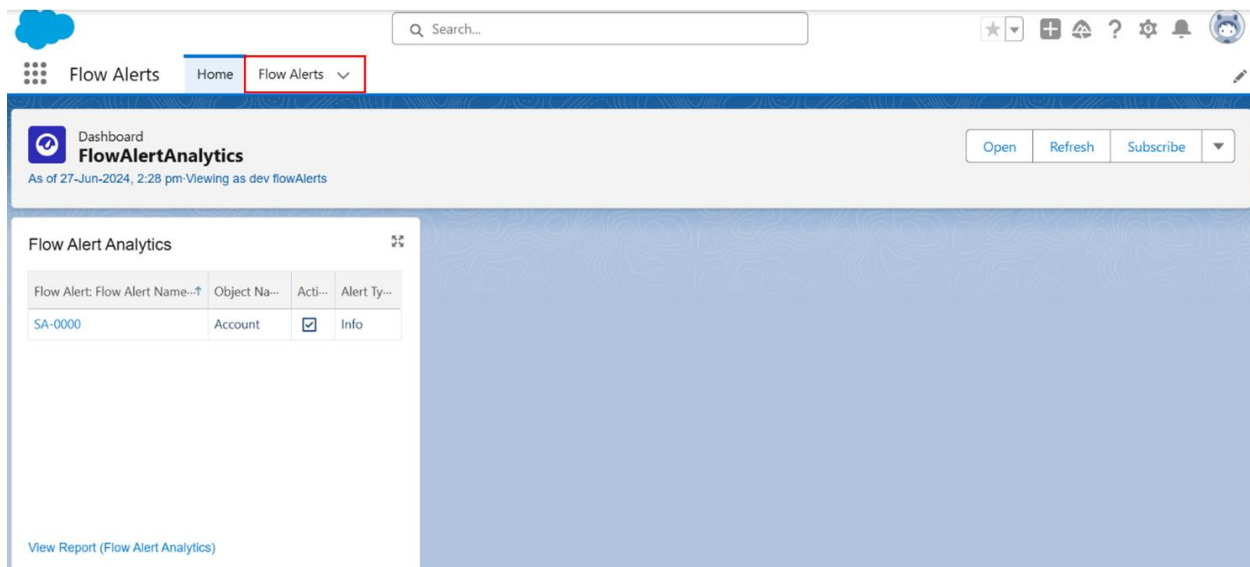


If the report isn't visible on the homepage, please refresh the page. Please ignore this if the report is visible



FLOW ALERTS TAB

To create a new flow alert, click on the **Flow Alerts** tab. This navigates the user to the **Flow Alerts** Object.



We can use Flow Alerts application to create three types of Flow Alerts.

1. Error
2. Warning
3. Info

Flow Alert

* = Required Information

Flow Alert Information

Flow Alert Name

* Object Name
Choose sObject

* Condition Met
Choose Condition

Advanced Condition

☐ Active

Active Duration(No.of days)

Owner
Solunus flowalerts

* Alert Label

* Message

* Alert Type
Choose Operator

Select Criteria

Field Name	Operator	Field Value	Index
--None--	Choose Operator		

Cancel Save

The below table describes what each field in Flow Alerts is used for.

FLOW ALERT OBJECT FIELDS

FIELD NAME	DESCRIPTION
Object Name	The dropdown will display the names of SObjects in Salesforce.
Condition Met	The 'Condition Met' field will have three options: 'AND,' 'OR,' and 'Custom,' to meet various requirements
Advanced Condition	The 'Advanced Condition' option will only be enabled if 'Condition Met' is set to 'Custom,' allowing the user to define custom logic
Alert Label	The 'Alert Label Description' provides a brief explanation of the alert label
Message	The 'Message Description' provides detailed information about the message content
Alert Type	The 'Alert Type Description' provides details about the type of alert being issued. With three different types error, warning and info
Active	The 'Active Description' indicates whether the alert is currently active or inactive.
Active Duration (No.of days)	The 'Active Duration (No. of days)' description specifies the number of days an item or alert remains active.
Field Name	The 'Field Name' contains the fieldnames of the selected object
Operator	The 'Operator' explains the function or role of the operator in a given context
Field Value	The 'Field Value ' provides information about the data or content that is entered into a specific field
Index	An index is used to represent numbers, which will then be used to determine the logic for the 'Condition Met' status
+	Add a new row with this button
	Delete a row with this button
Save	Saves the record

HOW TO CREATE ERROR FLOW ALERT:

To create flow alerts using the object, we will need to fill in the required details -

1. Select the **Object Name** from the dropdown.
2. Select the **Condition Met** whether it is AND, OR and CUSTOM from dropdown
 - a. If we select CUSTOM the **Advanced Condition** Field will be enabled
3. Check the checkbox **Active** to set the status of the Flow Alert to *active*.
4. Give the **Alert Label** data you needed in the Alert Label Text Box
5. Give the Validation Message you needed in the **Message** Text Box
6. And choose the **Alert Type** of **Info, Warning, Error** from drop down
7. **Field Name** will be populated based on selected Object
8. Select the **Operator** from the drop down
9. Choose the **Field Value** you want to give based on the Field Name
10. The **Index** represents the value, and based on this, we will assign the value for conditions met.

Now, Lets create flow alerts based on few scenarios and see what the output looks like.

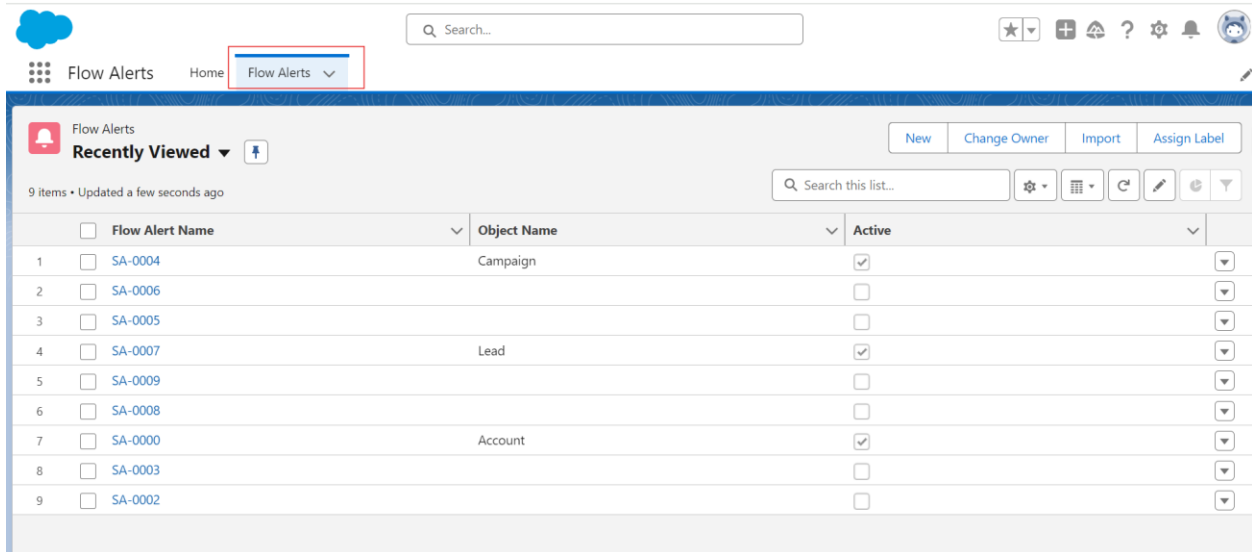
SCENARIO1:

Let's consider a scenario where the system needs to validate whether an Opportunity is linked to an Account that has an Oracle ID populated. If the Oracle ID field on the related Account is blank, the system should trigger an error message.

Criteria: If the Oracle ID is not populated on account related to opportunity. Below message should be displayed.

Message (Error): Your Opportunity is currently linked to an Account that does not have an Oracle. Astea ID. Please send an email to salesforcehelp@salesforce.com to map the Opportunity to correct Account.

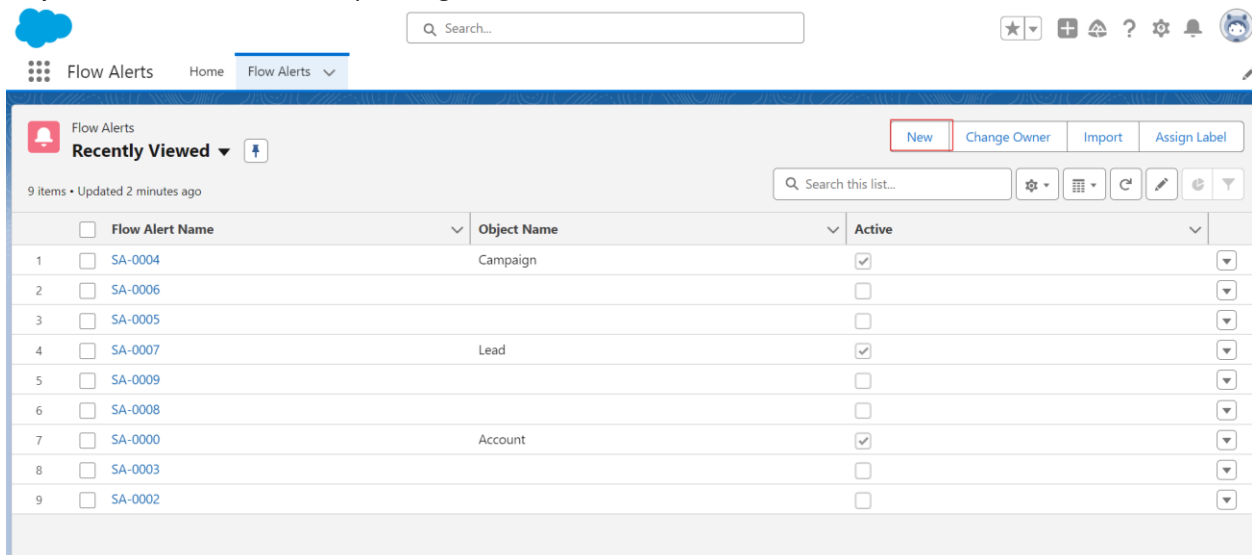
Step1: Navigate to Flow Alerts Tab



The screenshot shows the Salesforce Flow Alerts interface. The 'Flow Alerts' tab is selected in the navigation bar. The interface displays a table of 9 flow alerts with columns for Flow Alert Name, Object Name, and Active status. The 'New' button is highlighted in the top right corner.

	Flow Alert Name	Object Name	Active
1	SA-0004	Campaign	✓
2	SA-0006		
3	SA-0005		
4	SA-0007	Lead	✓
5	SA-0009		
6	SA-0008		
7	SA-0000	Account	✓
8	SA-0003		
9	SA-0002		

Step2: Create a New FlowAlert by clicking on New Button



The screenshot shows the Salesforce Flow Alerts interface. The 'New' button is highlighted in the top right corner. The interface displays a table of 9 flow alerts with columns for Flow Alert Name, Object Name, and Active status.

	Flow Alert Name	Object Name	Active
1	SA-0004	Campaign	✓
2	SA-0006		
3	SA-0005		
4	SA-0007	Lead	✓
5	SA-0009		
6	SA-0008		
7	SA-0000	Account	✓
8	SA-0003		
9	SA-0002		

Step3: select Object name as "Opportunity" Condition Met is "AND" Active as "checked" Alert Label as "Account Update" Message as "Your Opportunity is currently linked to an Account that does not have an OracleID. Please

send an email to salesforcehelp@salesforce.com to map the Opportunity to correct Account” Alert type as “Error”

In select criteria Section Please add the conditions

Flow Alert

* = Required Information

Flow Alert Information

Flow Alert Name

SA-0516

Owner

Flowalerts package

* Object Name

Opportunity

* Alert Label

Account Update

* Condition Met

AND

* Message

Your Opportunity is currently linked to an Account that does not have an OracleID.
Please send an email to salesforcehelp@salesforce.com to map the Opportunity to

Advanced Condition

* Alert Type

Error

☒ Active

Advanced Condition

☒ Active

Active Duration(No.of days)

Select Criteria

Field Name	Operator	Field Value	Index	
Oracle/Astea ID	Equals		1	
Account ID	Not Equals	Null	2	

Cancel

Save

Step4: click on save

Select Criteria

Field Name	Operator	Field Value	Index	
Oracle/Astea ID	Equals		1	
Account ID	Not Equals	Null	2	

Cancel

Save

Step5: After saving the record , FlowAlert record detail page will be as shown below



Flow Alerts
Home
Flow Alerts


Flow Alert
SA-0516

Related

Details

Flow Alert Name

SA-0516

Object Name ⓘ

Opportunity 

Condition Met ⓘ

AND 

Active

☒ 

Active Duration(No.of days)



Record Type

Parent Alert 

Owner

 [Flowalerts package](#) 

AlertLabel

Account Update 

Alert Type ⓘ

Error 

Message ⓘ

Your Opportunity is currently linked to an Account that does not have an OracleID. Please send an email to salesforcehelp@salesforce.com to map the Opportunity to correct Account. 

Created By

 [Flowalerts package](#), 7/18/2024, 12:29 AM

Last Modified By

 [Flowalerts package](#), 8/5/2024, 4:24 AM


Flow Alerts (2)



[Change Owner](#)

2 items • Updated a minute ago

	☐ Flow Alert Name	Field Name	Operator	Field Value	Index	
1	☐ SA-0517	SIP_FA__Oracle_Astea_ID__c	Equals		1	
2	☐ SA-0518	AccountId	Not Equals	Null	2	

[View All](#)

SCENARIO2:

Let us consider a scenario If the Primary Quote is not populated on the Opportunity the alert message will be displayed on an Opportunity object

To display this as Warning we need to select **Alert type** dropdown as **warning**

Criteria: If the field is not populated on Opportunity.

Message (Warning): An Opportunity should have a Primary Quote

Step1: create a new flow Alert.

Click on "New"

Flow Alert

* = Required Information

Flow Alert Information

Flow Alert Name _____ Owner Solunus flowalerts

* Object Name * Alert Label

* Condition Met * Message

Step2:select Object name as **“Opportunity”** Condition Met is **“AND”** Active as **“checked”** Alert Label as **“Primary Quote is Missing”** Message as **“An Opportunity should have a Primary Quote”** Alert type as **“Warning”**
In select criteria Section Please add the conditions as Field name as **“Quote”** Operator as **“Equals”** Field value as **“empty”** and Index as **“1”**

Flow Alert

* = Required Information

Flow Alert Information

Flow Alert Name SA-0514 Owner Flowalerts package

* Object Name * Alert Label

* Condition Met * Message

Advanced Condition

☒ Active * Alert Type

Active Duration(No.of days)

Select Criteria

Field Name	Operator	Field Value	Index
Quote	Equals		1

+ -

Step3: After saving the record Flow Alert record detail page will be as shown below



Flow Alerts
 Home
 Flow Alerts ▾

Flow Alert
SA-0514

Related

Details

Flow Alert Name

SA-0514

Object Name ⓘ

Opportunity

Condition Met ⓘ

AND

Active

☒

Active Duration(No.of days)

Record Type

Parent Alert

Created By

Flowalerts package, 7/17/2024, 1:56 AM

Owner

Flowalerts package

AlertLabel

Primary Quote is missing

Alert Type ⓘ

Warning

Message ⓘ

An Opportunity should have a Primary Quote

Last Modified By

Flowalerts package, 8/5/2024, 4:31 AM

Flow Alerts (1)

Change Owner

1 item • Updated a few seconds ago

	☐ Flow Alert ... ▾	Field Name ▾	Operator ▾	Field Value ▾	Index ▾	
1	☐ SA-0515	SIP_FA_Quote_c	Equals		1	

SCENARIO3:

Let us consider scenarios that ensures an informational message is displayed on all Opportunities. The message informs users that all Final Quote Documents should be stored on the CPQ Quote rather than the Opportunity, except for cases involving an Apttus Quote. To display this as an informational message, set the "Alert type" dropdown to "Info."

To display this alert as an info we need to select **Alert type** dropdown as **"Info"**

Criteria: To display info on all opportunities

Message (Info): All Final Quote Documents should reside on the CPQ Quote and NOT the Opportunity, unless you have an Apttus Quote.

Step1: Create a new flow alert

Flow Alert

* = Required Information

Flow Alert Information

Flow Alert Name Owner
Solunus flowalerts

* Object Name * Alert Label

Choose sObject

* Condition Met * Message

Choose Condition

Step2: Select *Object name* as **“Opportunity”** *Condition Met* is **“AND”** *Active* as **“checked”** *Alert Label* as **“QuoteDocuments”** *Message* as **“All Final Quote Documents should reside on the CPQ Quote and NOT the Opportunity, unless you have an Apttus Quote.”** *Alert type* as **“Info”**
 In select criteria Section Please add the conditions as *Field name* as **“Name”** *Operator* as **“NotEquals”** *Field value* as **“empty”** and *Index* as **“1”**

Flow Alert

* = Required Information

Flow Alert Information

Flow Alert Name
SA-0519 Owner
Flowalerts package

* Object Name * Alert Label

Opportunity Quote Documents

* Condition Met * Message

AND All Final Quote Documents should reside on the CPQ Quote and NOT the Opportunity, unless you have an Apttus Quote.

Advanced Condition * Alert Type

☒ Active Info

Active Duration(No.of days)

Select Criteria

Field Name	Operator	Field Value	Index
Name	Not Equals		1

Cancel Save

Step3: After saving the record Flow Alert record detail page will be as shown below

Flow Alerts

Home
Flow Alerts

★
+
🔍
?
⚙️
🔔
👤

Flow Alert

SA-0519

Edit
Delete
Clone

Related
Details

Flow Alert Name

SA-0519

Object Name

Opportunity

Condition Met

AND

Active

☒

Active Duration(No.of days)

Record Type

Parent Alert

Created By

Flowalerts package, 7/19/2024, 2:56 AM

Owner

Flowalerts package

AlertLabel

Quote Documents

Alert Type

Info

Message

All Final Quote Documents should reside on the CPQ Quote and NOT the Opportunity, unless you have an Apttus Quote.

Last Modified By

Flowalerts package, 8/5/2024, 5:37 AM

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Flow Alerts (1)

1 item • Updated a few seconds ago

⚙️

📄

Change Owner

	Flow Alert Name	Field Name	Operator	Field Value	Index
1	☐ SA-0520	Name	Not Equals	1	

View All

DELETING INACTIVE ALERTS VIA ANONYMOUS WINDOW

Inactive Alerts: To remove the alert from appearing on a specific object's record detail page when a checkbox in the Flow Alert page is unchecked, use the following code snippet.

This is an inactive alert because the Active checkbox is unchecked.

Flow Alert SA-0021

Related Details

Flow Alert Name	SA-0021	Owner	Flowalerts package
Object Name	Account	AlertLabel	test
Condition Met	AND	Alert Type	Info
Active	☐	Message	test123
Active Duration(No.of days)			
Record Type	Parent Alert		
Created By	Flowalerts package, 6/18/2024, 12:48 AM	Last Modified By	Flowalerts package, 6/27/2024, 1:19 AM

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Inactive alerts are deleted when the code snippet runs, unless an active duration is specified. If a duration is set and the active checkbox is unchecked, the alert will be deleted only after surpassing the specified days, ensuring it's not deleted prematurely.

Flow Alert SA-0021

Related Details

Flow Alert Name	SA-0021	Owner	Flowalerts package
Object Name	Account	AlertLabel	test
Condition Met	AND	Alert Type	Info
Active	☐	Message	test123
Active Duration(No.of days)	2		
Record Type	Parent Alert		
Created By	Flowalerts package, 6/18/2024, 12:48 AM	Last Modified By	Flowalerts package, 6/27/2024, 1:27 AM

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

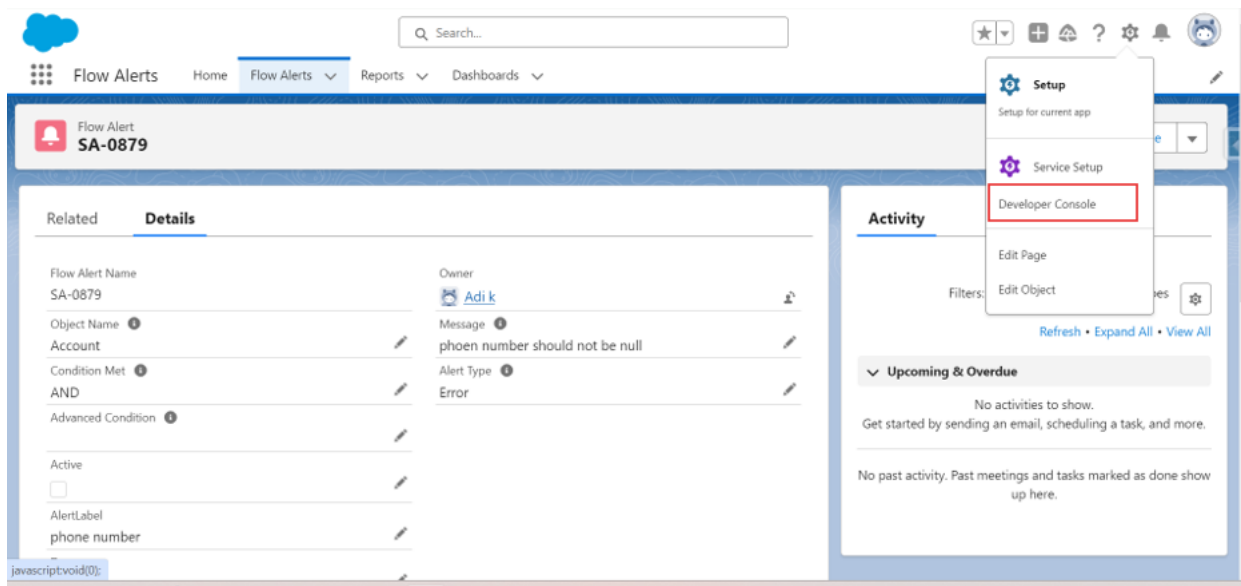
No past activity. Past meetings and tasks marked as done show up here.

In the above-mentioned screenshot If we run the code snippet, the alert will be deleted after 2 days only if we run the code snippet

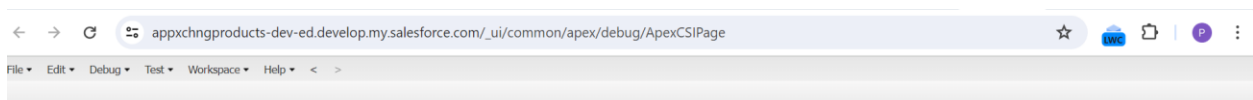
Deleting Inactive Alerts via Anonymous Window:

Steps to follow:

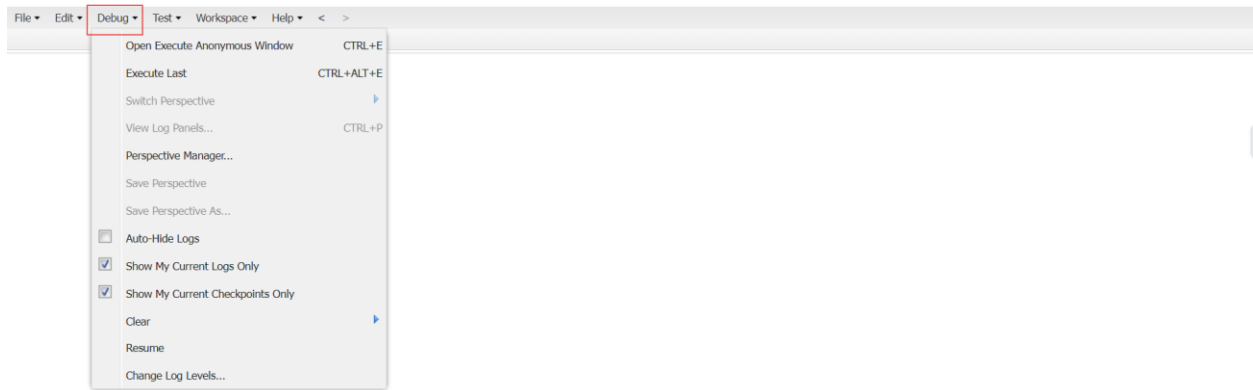
- 1.Log in to Salesforce:** Open your web browser and navigate to your Salesforce login page. Enter username and password then click log in
- 2. Open Developer Console:** Click on your profile picture or the user icon in the top right corner.



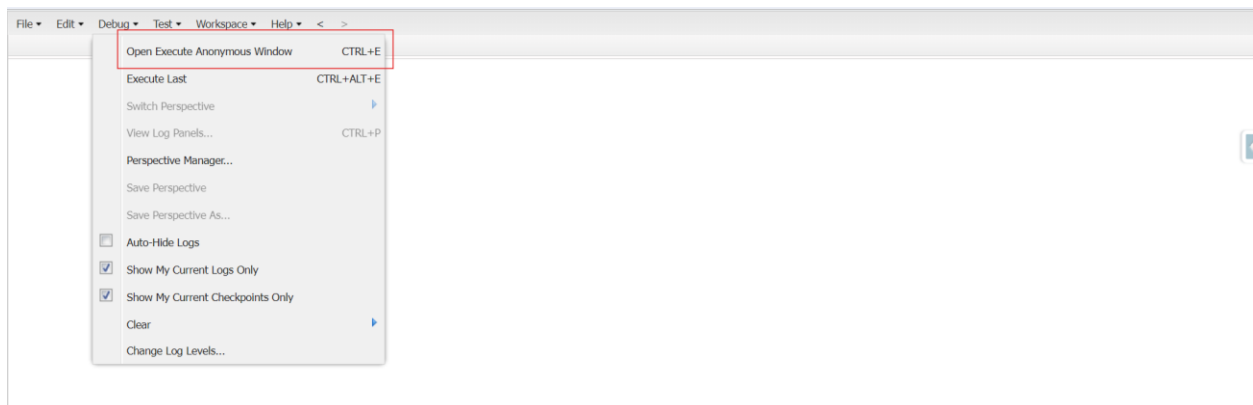
Select Developer Console from the dropdown menu. The Developer Console will open in a new window.



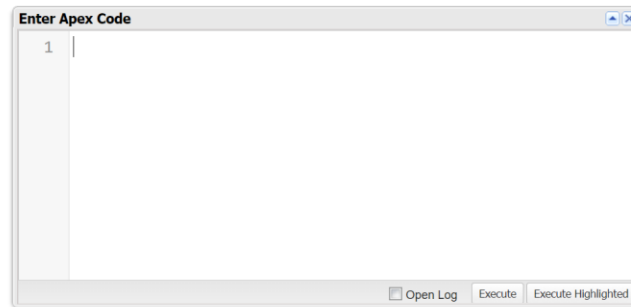
3. Access the Anonymous Window: In the Developer Console, click on Debug in the top menu.



Select Open Execute Anonymous Window from the dropdown. This will open the Anonymous Window where you can run Apex code.



Click on open Execute Anonymous window



Enter this code snippet if you want to delete **“inactive flow alerts”**

```
List<Solunus_FA__Flow_Alert__c> flowAlerts = [
    SELECT Id, Solunus_FA__Date__c, CreatedDate
    FROM Solunus_FA__Flow_Alert__c
    WHERE Solunus_FA__IsActive__c = false And Parent_Alert__c = null
];

Set<Id> parentflowId = new Set<Id>();

Date today = Date.today();
List<Flow_Alert__c> recordsToDelete = new List<Flow_Alert__c>();
for (Solunus_FA__Flow_Alert__c record : flowAlerts) {
    Boolean shouldDelete = false;
    if (record.Solunus_FA__Date__c != null) {
        Integer daysDifference = record.CreatedDate.date().daysBetween(today);
        if (daysDifference > Integer.valueOf(record.Solunus_FA__Date__c)) {
            parentflowId.add(record.Id);
            shouldDelete = true;
        }
    } else {
        shouldDelete = true;
    }
    if (shouldDelete) {
        recordsToDelete.add(record);
    }
}
```

```

    }
}

```

```

List<Solunus_FA__Flow_Alert__c> childList = [Select id,Name,Solunus_FA__Parent_Alert__c from
Solunus_FA__Flow_Alert__c Where Solunus_FA__Parent_Alert__c In:parentflowId];

```

```

if(!childList.isEmpty()){
    delete childList;
}

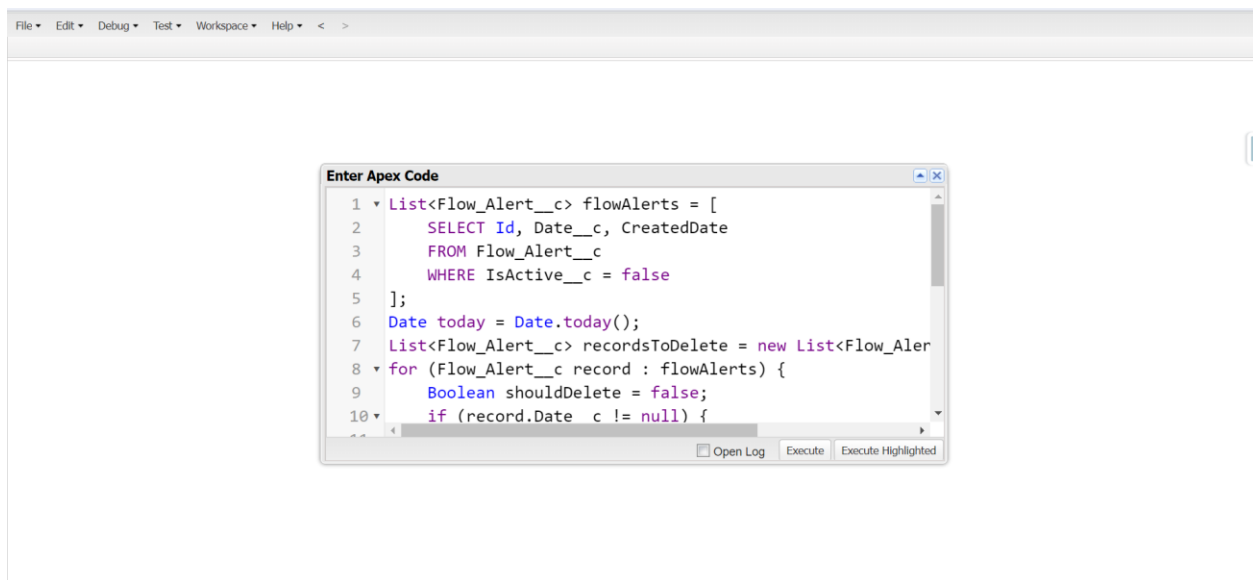
```

```

if (!recordsToDelete.isEmpty()) {
    for (Flow_Alert__c record : recordsToDelete) {
        System.debug('Deleting Flow Alert Id: ' + record.Id);
    }
    delete recordsToDelete;
}

```

Follow the above-mentioned steps and copy the code and paste in the **anonymous window** as shown below



Highlight the code and click on execute Highlighted once it is executed it will delete all inactive alerts



```
15 } else {  
16     shouldDelete = true;  
17 }  
18 if (shouldDelete) {  
19     recordsToDelete.add(record);  
20 }  
21 }  
22 if (!recordsToDelete.isEmpty()) {  
23     delete recordsToDelete;  
24 }
```

Open Log Execute Execute Highlighted

Once the code is executed inactive flow alerts will be deleted.

USER VIEW

When end users log into Salesforce and use flow alerts, they will see these messages appear based on the criteria set by the administrators.

1. When a sales representative is working on an opportunity in Salesforce, they might encounter Alerts if the related account does not have an required data. This message prompts them to act by notifying the Salesforce support team to correct the mapping of the opportunity to the appropriate account. This ensures that all opportunities are linked to accounts with complete and accurate information, which is crucial for tracking and reporting purposes.

If we logged in as an end user, he could see the alerts as shown below which was configured by an administrator

Flow Alerts

Home
Flow Alerts
Burlington Textiles Weaving Plant Generator

Flow Alerts

Opportunity

Burlington Textiles Weaving Plant Generator

Edit
Delete
Clone

Account Name
test

Close Date
5/20/2022

Amount
\$235,000.00

Opportunity Owner
Flow Alerts package

Qualification
Needs Analysis
Value Proposition
Id. Decision Makers
Perception Analysis
Proposal/Price Quote
Negotiation/Review
Closed

Mark Stage as Complete

Activity
Details

Opportunity Owner	Amount	
Flow Alerts package	\$235,000.00	
Private	Expected Revenue	
	\$23,500.00	
Opportunity Name	Close Date	
Burlington Textiles Weaving Plant Generator	5/20/2022	
Account Name	Next Step	
test		
Type	Stage	
New Customer	Qualification	
Lead Source	Probability (%)	
Web	10%	
Oracle/Asana ID	Primary Campaign Source	
Quote		
Order Number	Main Competitor(s)	
645612	John Deere	

Account Update

Your Opportunity is currently linked to an Account that does not have an Oracle/Asana ID. Please send an email to salesforcehelp@daikinapplied.com to map the Opportunity to correct Account.

Primary Quote is missing

An Opportunity should have a Primary Quote

Quote Documents

All Final Quote Documents should reside on the CPQ Quote and NOT the Opportunity, unless you have an Apttus Quote.

Related

Products (0)

Notes & Attachments (0)

Upload Files