



SOLUNUS
Enabling Customer Success

FLOW ALERT

(User Manual – Part 1)



Contents

OVERVIEW	2
FEATURES	2
INSTALLATION STEPS	3
STEPS FOR INSTALLATION OF THE PACKAGE	3
POST INSTALLATION STEPS:.....	3
ACTIVATING FLOWS.....	3
GIVING ACCESS TO FLOW AT PROFILE LEVEL.....	6
PROVIDING ACCESS TO APEX CLASS AT PROFILE LEVEL	10
PROVIDING ACCESS TO FLOW ALERT OBJECT AT PROFILE LEVEL	13
ADDING LWC COMPONENT TO LIGHTNING PAGE.....	18
ASSIGNING LIGHTNING RECORD PAGES TO THE RESPECTIVE LAYOUTS.....	23

OVERVIEW

In Salesforce, maintaining data quality can be challenging, and while traditional validation rules are crucial for data integrity, they can sometimes disrupt workflows by blocking users from saving records. Enter, Flow Alerts.

Flow Alerts provide a flexible solution with varying severity levels (info, warning, error) to help users manage data accuracy and completeness. Unlike validation rules, Flow Alerts notify users of potential issues without preventing record creation or updates, ensuring a smooth workflow.

By offering immediate feedback on data issues while allowing records to be saved, Flow Alerts enhance user experience and efficiency. They help users address data integrity concerns without causing workflow interruptions, thus improving overall satisfaction. Flow Alerts are designed to guide users and mitigate risks related to data quality, making it easier to uphold essential data integrity rules without replacing existing validation mechanisms.

FEATURES

INFO ALERTS:

These alerts provide non-critical information or tips to users. For instance, they can remind users of best practices or offer suggestions without requiring any immediate action.

Example: *"Tip: Please ensure all phone numbers include the area code."*

WARNING ALERTS:

These alerts highlight potential issues that should be addressed but do not prevent the user from saving the record. This helps in situations where data might be incomplete or potentially incorrect, but where immediate rectification isn't crucial.

Example: *"Warning: The email field appears to be empty. It's recommended to provide an email address for better communication."*

ERROR ALERTS:

These alerts indicate critical issues that need to be resolved before the operation can be completed. They are used when it is essential to prevent the user from proceeding without correcting the data.

Example: *"Error: The phone number provided is invalid. Please enter a valid phone number."*

FLEXIBLE RECORD MANAGEMENT:

Unlike validation rules that can be too restrictive by preventing the saving of records that do not meet certain criteria, Flow Alerts allow users to save records while still being made aware of issues that need attention. This flexibility is crucial in scenarios where rigid enforcement might hinder productivity or user experience.

USER GUIDANCE AND DATA QUALITY:

By using Flow Alerts, administrators can ensure users are informed about data quality and completeness, thereby reducing the chances of data errors. This method supports users in entering high-quality data without feeling constrained by strict validation rules.

INSTALLATION STEPS

STEPS FOR INSTALLATION OF THE PACKAGE

1. Go to the installation URL. Or, if you're installing the package from AppExchange, click **Get It Now** from the application information page.
2. Enter the Username and Password for the Salesforce organization in which you want to install the package, and then, click **Login**.
3. Select **Install in Production** or **Install in Sandbox**.
Note: If you're installing it into a sandbox, replace the part of the package installation link containing www.salesforce.com or Login.salesforce.com with test.salesforce.com.
4. Accept the terms and conditions, and then, click **Confirm and Install**.
5. Enter your org credentials.

POST INSTALLATION STEPS:

Once the package has been successfully installed, please proceed with the below step:

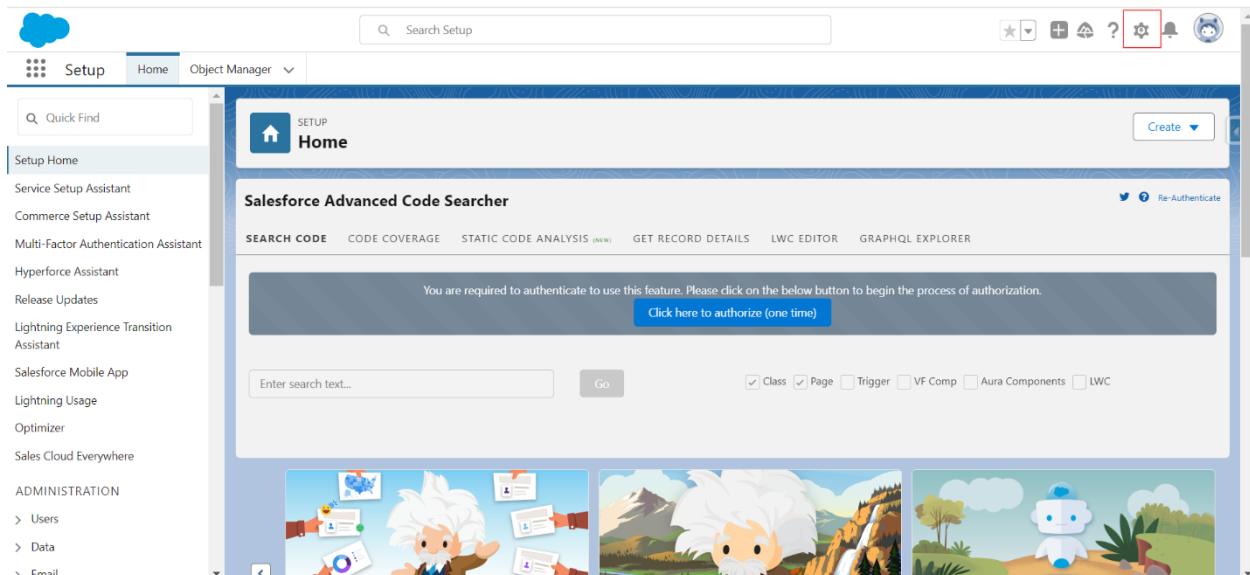
ACTIVATING FLOWS

To view alerts on the record detail page, it is essential to activate the flow – “**DataAlertDisplay**”. Without activating this flows, alert messages will not be displayed, and an error will occur. Follow below mentioned steps

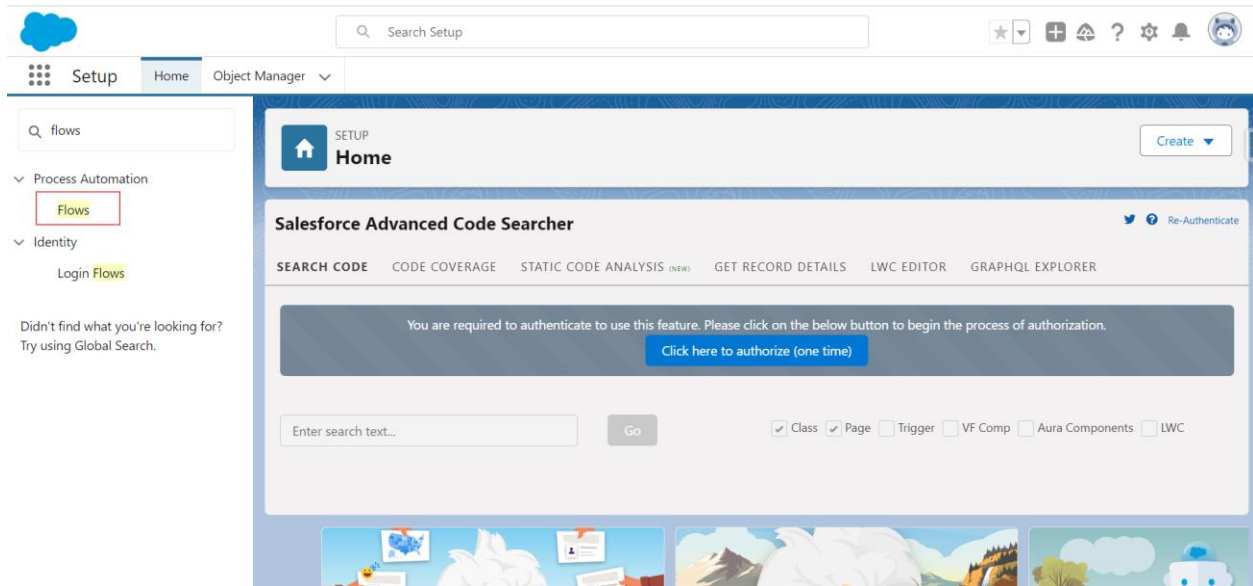
STEPS TO ACTIVATE THE FLOWS:

Note: If the flow is already activated, please ignore this step. If the flow is not active after installing the package, please follow the steps to activate the flow.

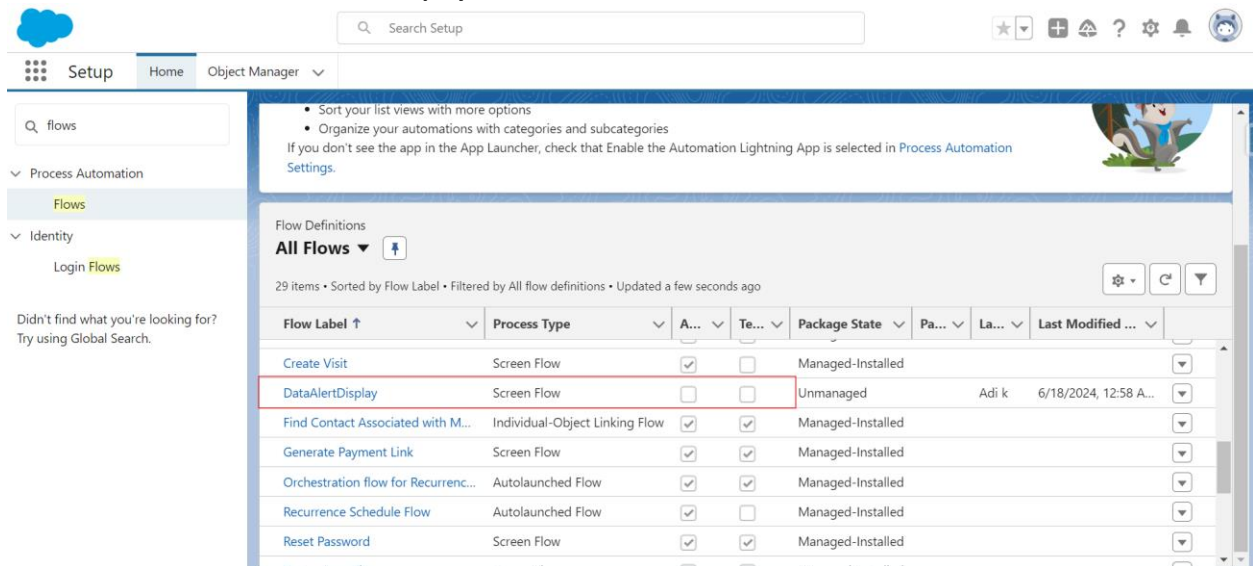
1. Navigate to Setup by clicking the gear icon at the top right and selecting Setup.



2. In the Quick Find box, type Flows and select **Flows**.



3. Select the flow "DataAlertDisplay"



4. Click on "View Details and Versions".

Search Setup

Setup Home Object Manager

flows

Process Automation

Flows

Identity

Login Flows

Didn't find what you're looking for? Try using Global Search.

Sort your list views with more options
Organize your automations with categories and subcategories
If you don't see the app in the App Launcher, check that Enable the Automation Lightning App is selected in Process Automation Settings.

Flow Definitions
All Flows

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

Flow Label	Process Type	Active	Tem...	Package State	Pac...	Last...	Last Modified D...
CMS: Review Content	Screen Flow	☒	☒	Managed-Installed			
CMS: Submit Content for Review	Screen Flow	☒	☒	Managed-Installed			
CMS: Withdraw Review Request	Screen Flow	☒	☒	Managed-Installed			
Create a Case	Screen Flow	☒	☒	Managed-Installed			
Create Order Summary Flow	Autolaunched Flow	☐	☒	Managed-Installed			
Create Process Exception Flow	Autolaunched Flow	☐	☒	Managed-Installed			
Create Slack Channel for Account	Screen Flow	☒	☒	Managed-Installed			
Create Visit	Screen Flow	☒	☐	Managed-Installed			
DataAlertDisplay	Screen Flow	☐	☐	Unmanaged	Adi k	6/18/2024, 12:58 AM	
Find Contact Associated with Messaging Session	Individual-Object Linking Flow	☒	☒	Managed-Installed			
Generate Payment Link	Screen Flow	☒	☒	Managed-Installed			
Orchestration flow for Runners-Scheduler	Autolaunched Flow	☒	☒	Managed-Installed			

View Details and Versions
Edit Access
Edit Details

5. Click on “Activate”. This will activate the flow.

Search Setup

Setup Home Object Manager

flows

Process Automation

Flows

Identity

Login Flows

Didn't find what you're looking for? Try using Global Search.

SETUP

Flow Detail

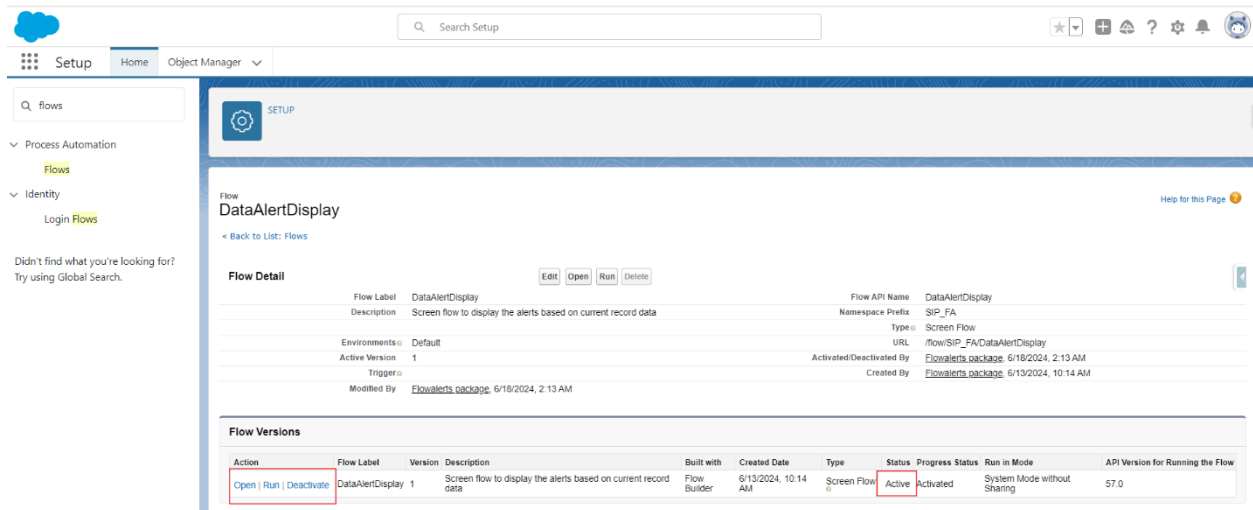
Edit Open Run Delete

Flow Label	DataAlertDisplay	Flow API Name	DataAlertDisplay
Description	Screen flow to display the alerts based on current record data	Namespace Prefix	SIP_FA
Environments	Default	Type	Screen Flow
Active Version		URL	/flow/SIP_FA/DataAlertDisplay
Trigger		Activated/Deactivated By	Flowalerts package, 6/18/2024, 2:07 AM
Modified By	Flowalerts package, 6/18/2024, 2:07 AM	Created By	Flowalerts package, 6/13/2024, 10:14 AM

Flow Versions

Action	Flow Label	Version	Description	Built with	Created Date	Type	Status	Progress Status	Run in Mode	API Version for Running the Flow
Open Run Activate	DataAlertDisplay	1	Screen flow to display the alerts based on current record data	Flow Builder	6/13/2024, 10:14 AM	Screen Flow	Inactive	Draft	System Mode without Sharing	57.0

By following these steps, you can successfully activate an existing flow in Salesforce. The status of the flow changes to Active.

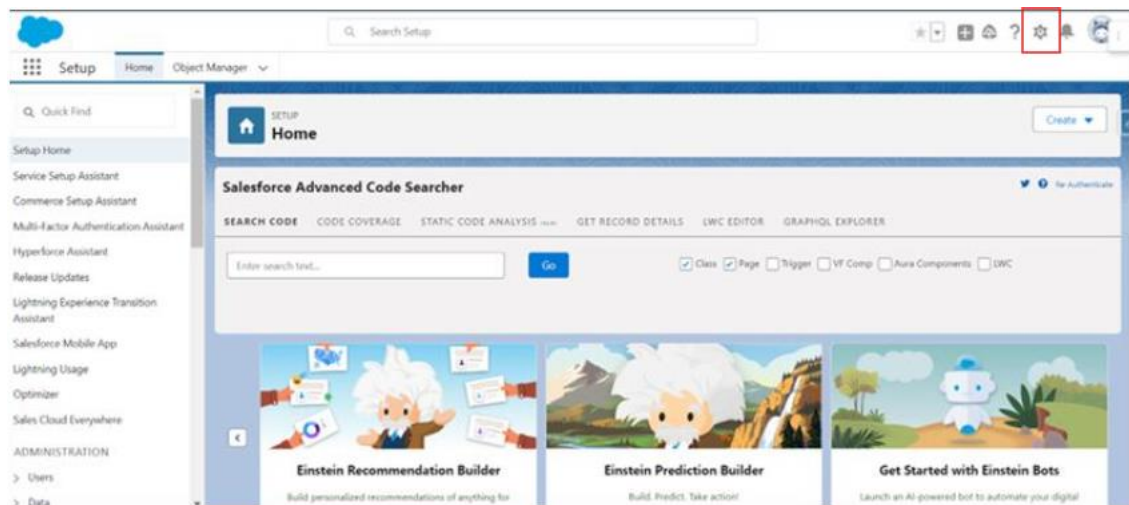


GIVING ACCESS TO FLOW AT PROFILE LEVEL

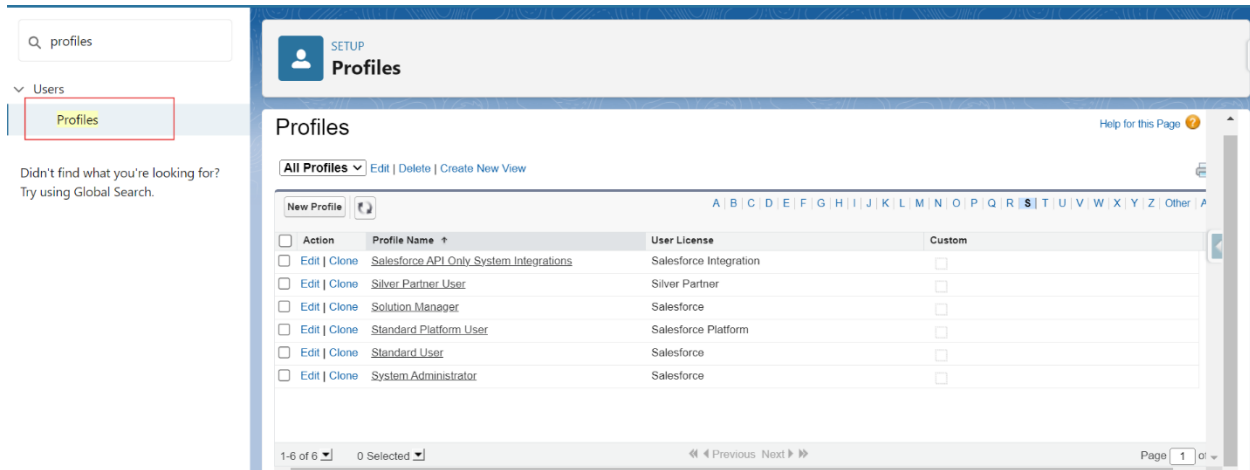
To enable users to view alerts, it is essential to grant access to flows at the profile level. This ensures that all necessary permissions are in place for users to interact with and benefit from flow alerts. Please follow these steps:

STEPS TO GIVE ACCESS TO FLOW FOR PROFILES:

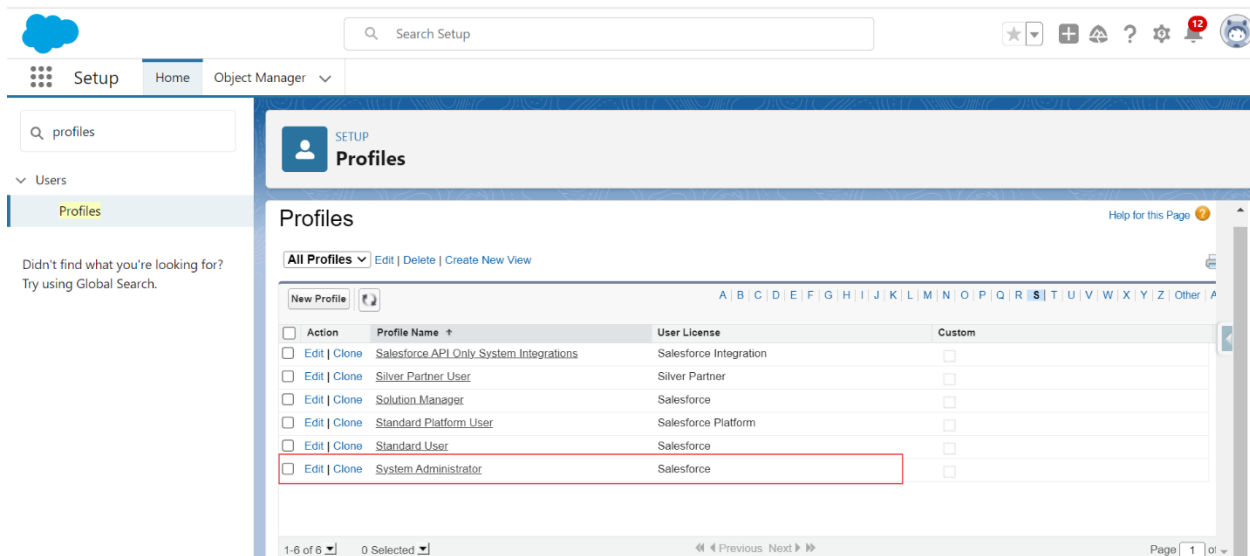
1. Navigate to Setup by clicking the gear icon at the top right and selecting Setup.



2. In the Quick Find box, type profiles and select profiles.



3. Select "System Administrator" profile.



4. Once in the selected profile, navigate to "Enabled Flow Access" section. You can do this by clicking on the "Enabled Flow Access" link.

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

Search Setup

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

Profiles

Profile: System Administrator

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [0] | Enabled Apex Class Access [4] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

Name: System Administrator

User License: Salesforce

Created By: salesforce.com, inc., 20/06/2024, 12:09 pm

Custom Profile: ☐

Modified By: dev flowAlerts, 20/06/2024, 12:40 pm

Page Layouts

Standard Object Layouts: Global, Global Layout

Location Group Assignment: Location Group Assignment Layout

5. Next, Click on **Edit**.

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

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ADMINISTRATION

Profiles

No Custom Setting Definitions enabled

Enabled Flow Access

No Flows enabled

Enabled Service Presence Status Access

No Service Presence Status enabled

Enabled Custom Permissions

No Custom Permissions enabled

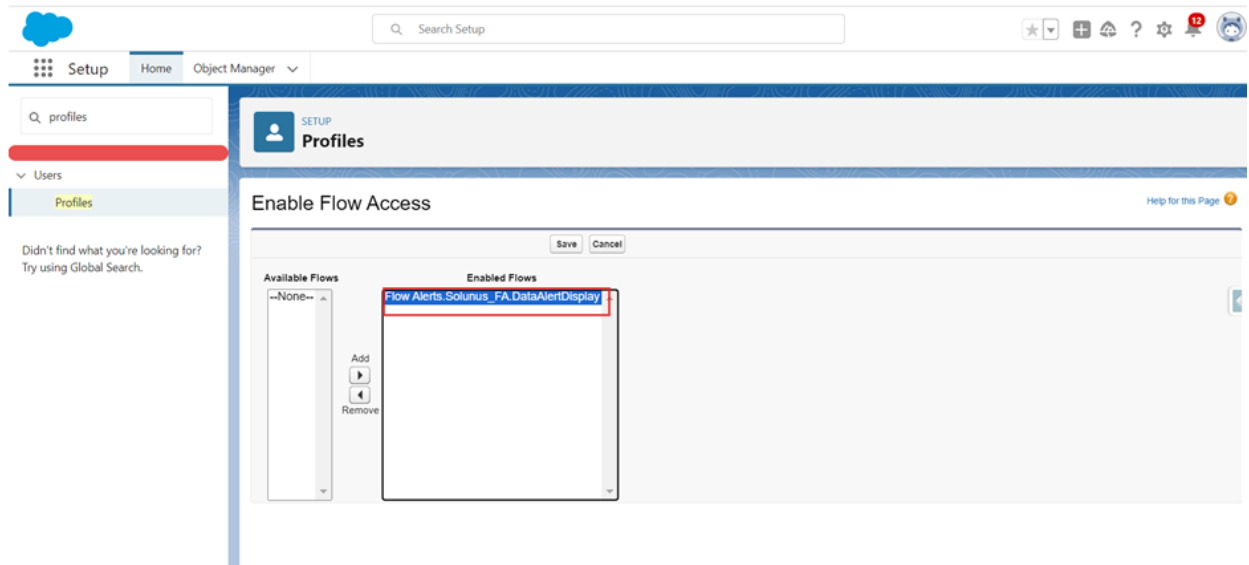
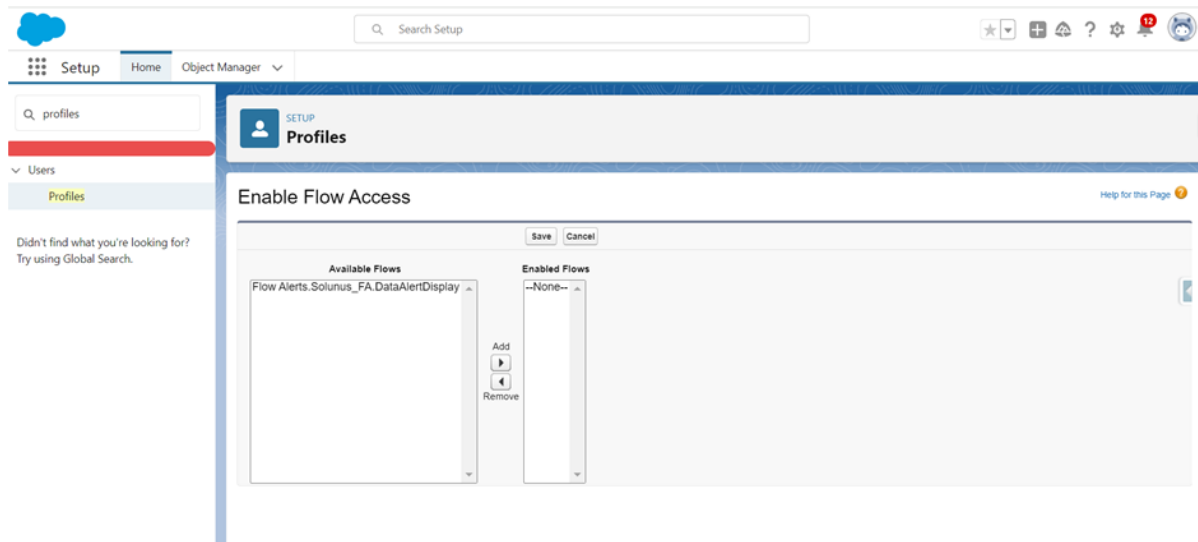
Default Experience Cloud Site

No default Experience Cloud site selected for System Administrator

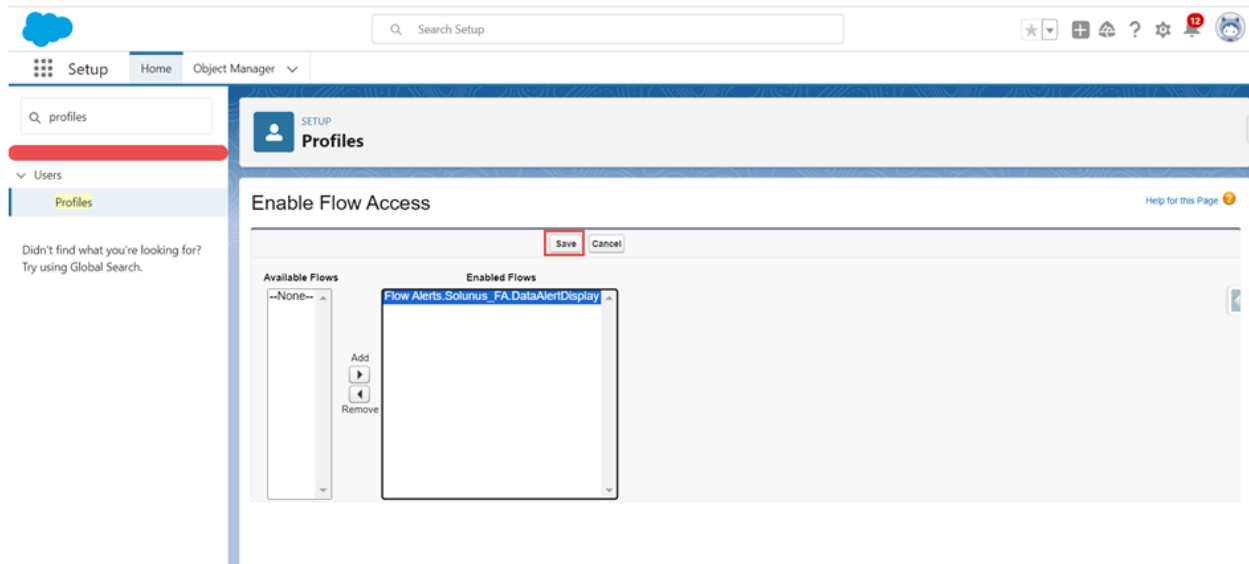
Back To Top

Always show me more records per related list

6. Select the Flow "FlowAlerts.Solunus_FA.DataAlertDisplay" from the Available Flows and click on "Add"

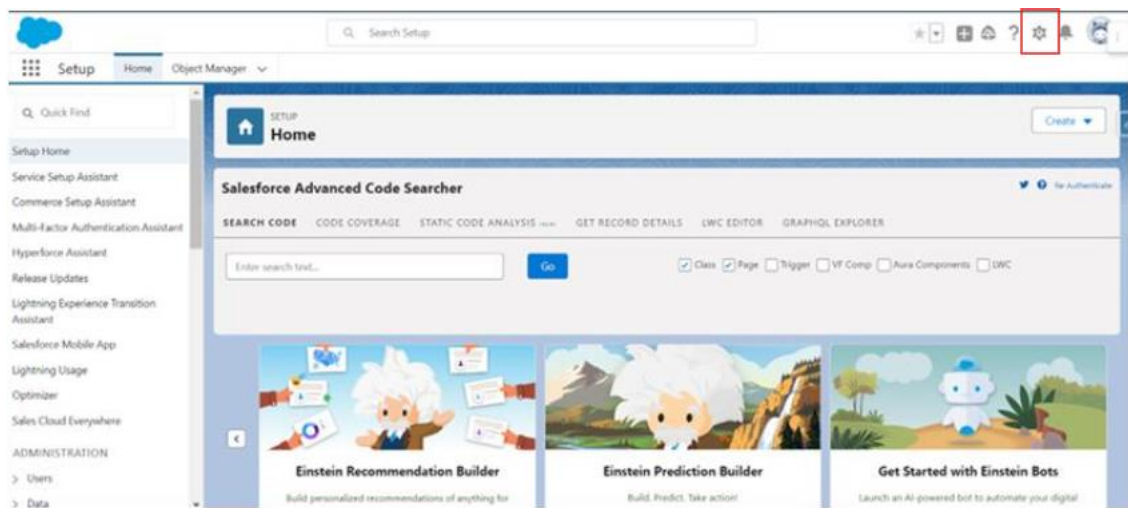


7. Click on **Save**. This will give access to “DataAlertDisplay”.

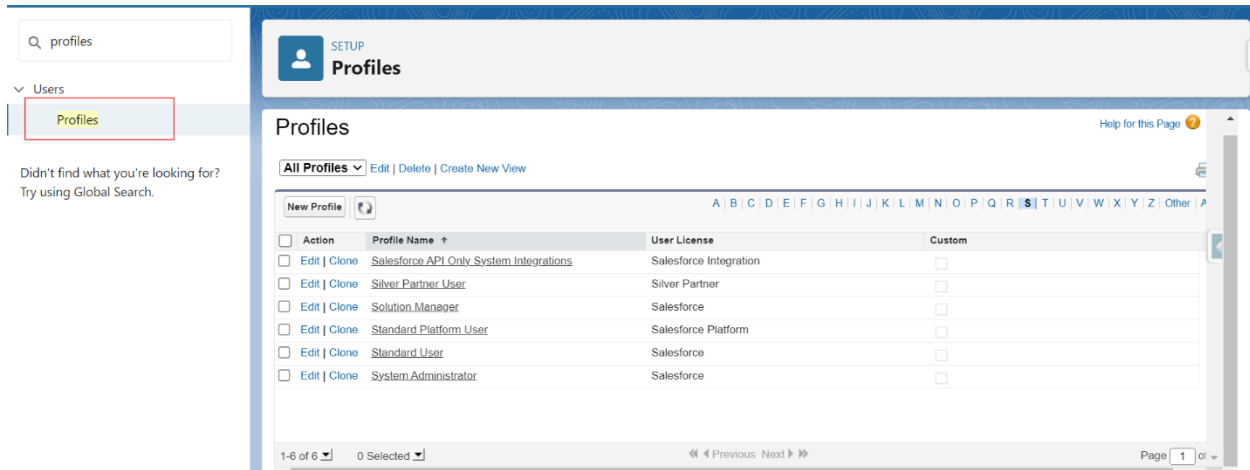


PROVIDING ACCESS TO APEX CLASS AT PROFILE LEVEL

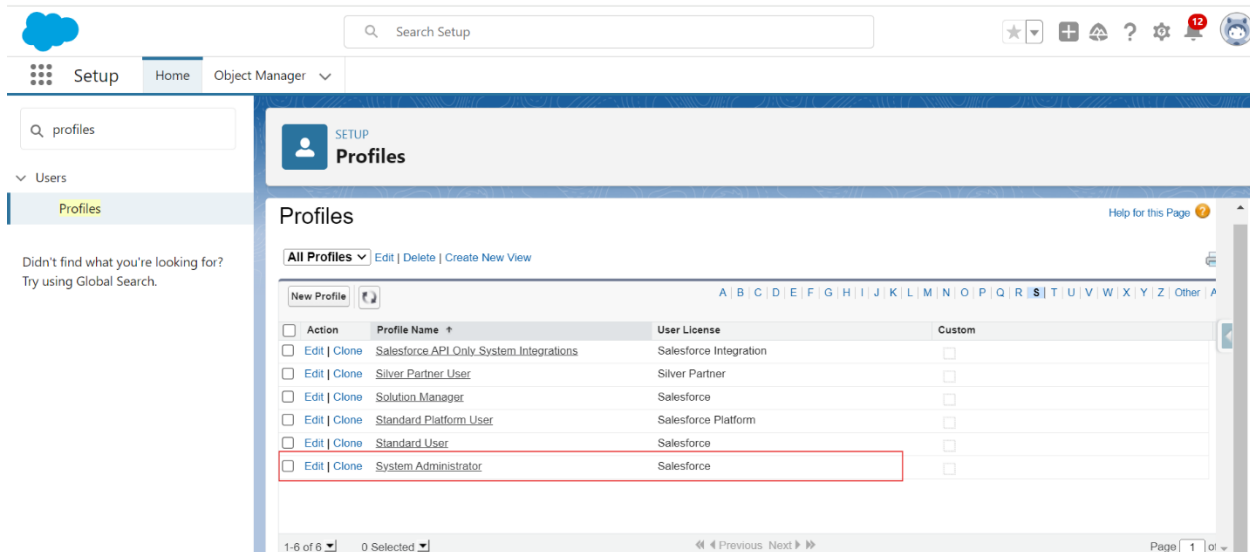
1. Navigate to Setup by clicking the gear icon at the top right and selecting Setup.



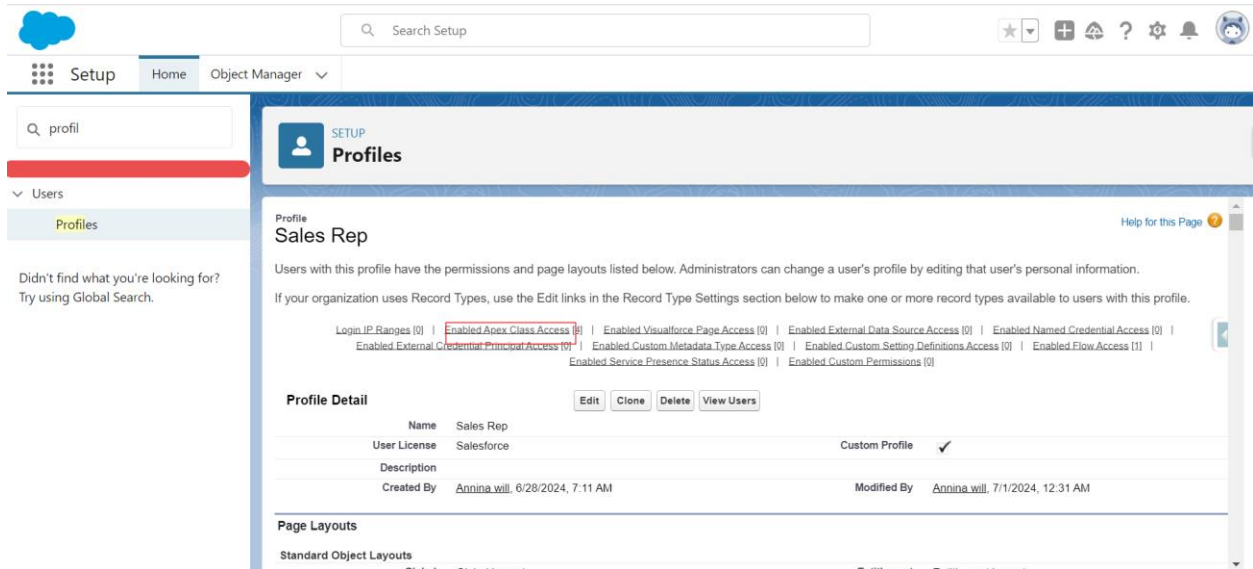
2. In the Quick Find box, type profiles and select profiles.



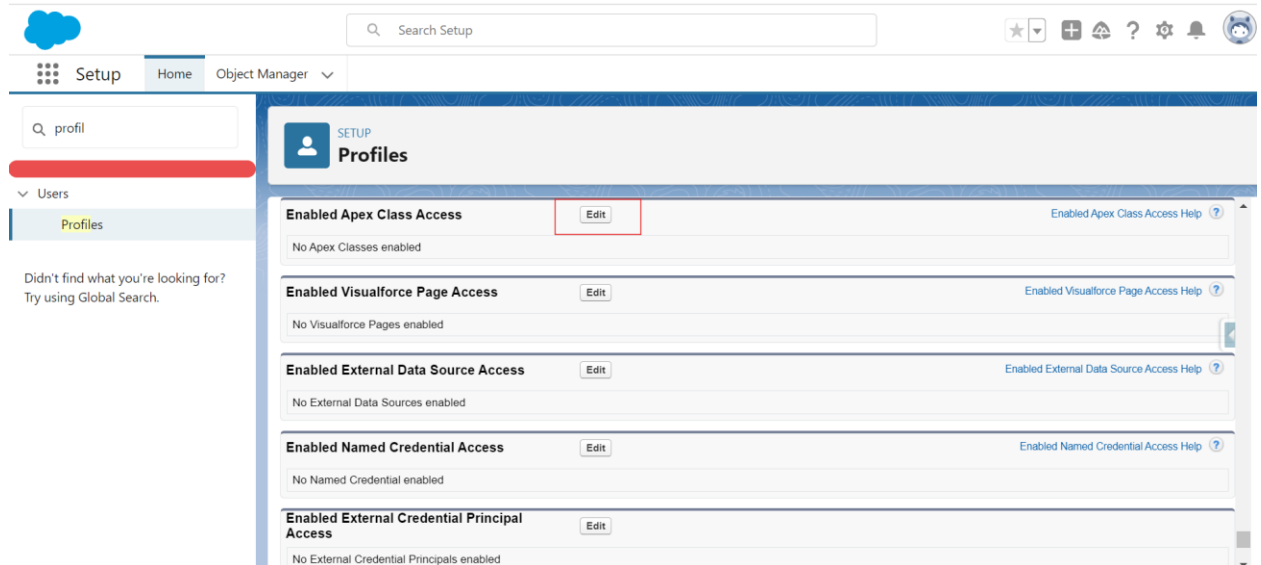
3. Select "System Administrator" profile.



4. Once in the selected profile, navigate to "Enabled Apex class Access" section. You can do this by clicking on the "Enabled Apex class Access" link.

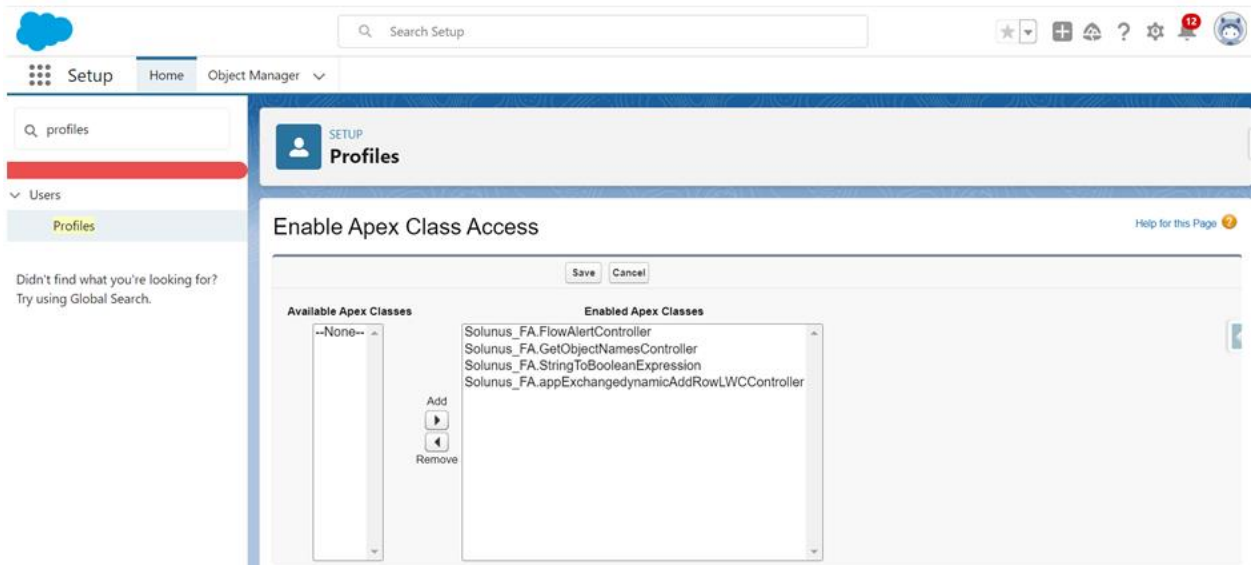


5. Next, Click on **Edit**.



6. Select the below apex classes and add to Enabled Apex classes

- Solunus_FA.FlowAlertController
- Solunus_FA.GetObjectNamesController
- Solunus_FA.StringToBooleanExpression
- Solunus_FA.appExchangedynamicAddRowLWCCController



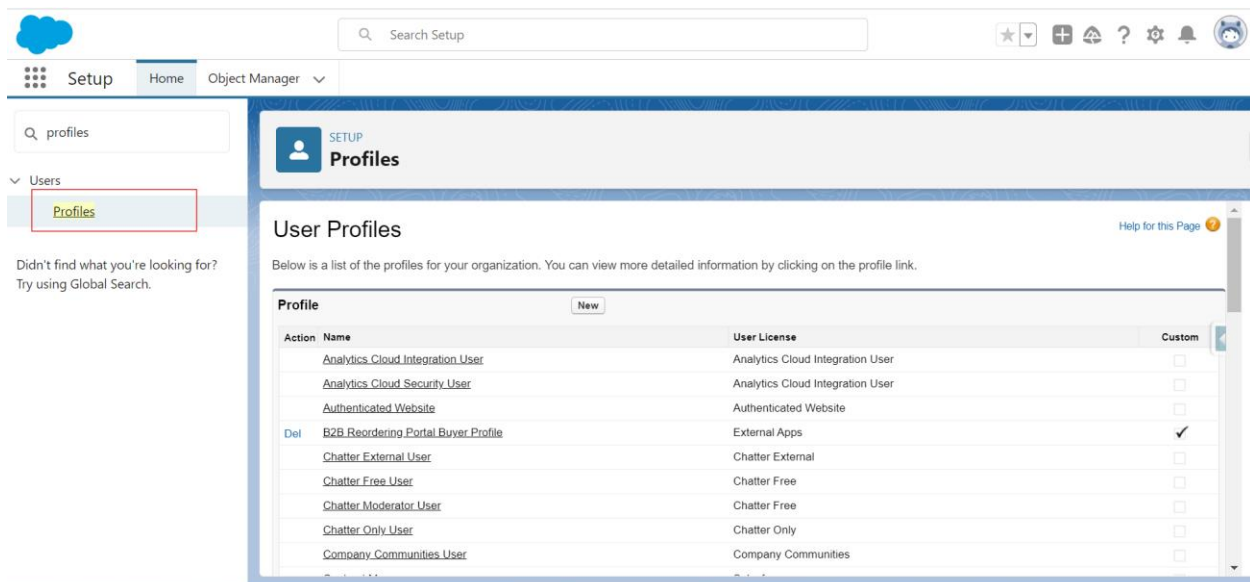
7. Click on **Save**.

PROVIDING ACCESS TO FLOW ALERT OBJECT AT PROFILE LEVEL

To ensure that end users can view object records, it is necessary to add the "Flow Alert "Object Access permission to their profiles. This permission will enable us to view the required object records. To achieve this, we need to follow below steps:

STEPS TO PROVIDE ACCESS TO AN OBJECT AT THE PROFILE LEVEL IN SALESFORCE.

1. In the Setup search box, type "Profiles" and click on "Profiles" under the "Users" section.



2. Select the profile: Find and click on the name of the profile for which you want to grant access to the object. This will open the profile settings page.

Search Setup

Setup Home Object Manager

Search: profil

Users Profiles

Didn't find what you're looking for? Try using Global Search.

Profiles

All Profiles Edit Delete Create New View

New Profile

Action	Profile Name	User License	Custom
Edit Delete	Sales Rep	Salesforce	☒
Edit Clone	Solution Manager	Salesforce	☐
Edit Clone	Standard Platform User	Salesforce Platform	☐
Edit Clone	Standard User	Salesforce	☐
Edit Clone	System Administrator	Salesforce	☐

1-5 of 5 0 Selected Previous Next Page 1 of 1

3. Click on profile and then click on **Edit**

Search Setup

Setup Home Object Manager

Search: profil

Users Profiles

Didn't find what you're looking for? Try using Global Search.

Profile Sales Rep

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges (0) | Enabled Apex Class Access (4) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (1) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

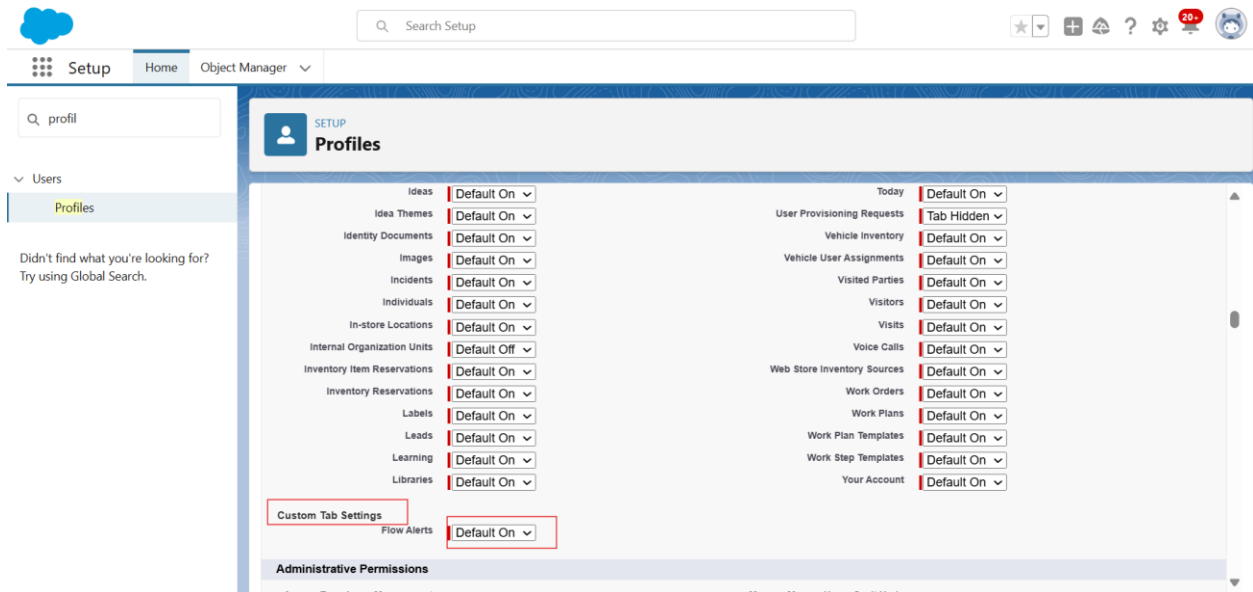
Profile Detail Edit Clone Delete View Users

Name	Sales Rep	Custom Profile	☒
User License	Salesforce		
Description			
Created By	yamsi Th. 6/28/2024, 7:11 AM	Modified By	yamsi Th. 6/28/2024, 8:36 AM

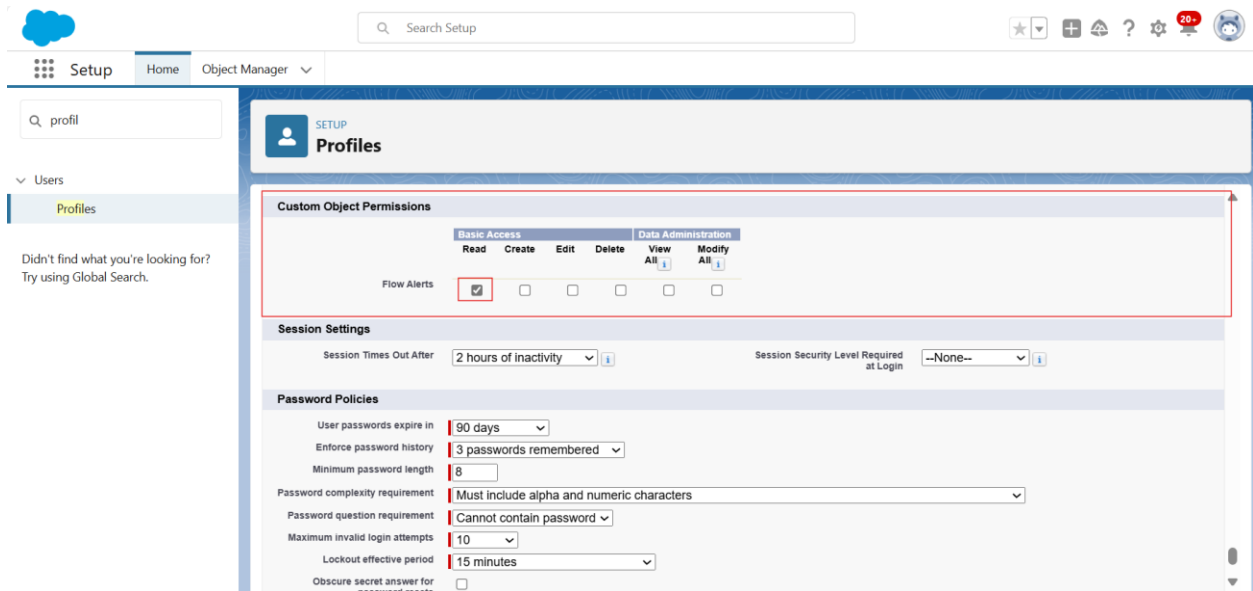
Page Layouts

Standard Object Layouts	Entitlement	Event	Expression Set	Expression Set Step Relationship	Expression Set Version	Feed Item
Global	Global Layout [View Assignment]	Entitlement Layout [View Assignment]				
Email Application	Not Assigned [View Assignment]	Event Layout [View Assignment]				
Home Page Layout	Dashboard Home Page Default [View Assignment]	Expression Set Layout [View Assignment]				
Access	Account Layout [View Assignment]	Expression Set Step Relationship Layout [View Assignment]				
Account	Account Layout [View Assignment]	Expression Set Version Layout [View Assignment]				
Action Plan	Action Plan Layout [View Assignment]	Feed Item Layout [View Assignment]				

4. Locate the object (**Flow Alerts**) that you want to provide access to, under **Tab Settings** section → Go to **Custom Tab Settings** section → select **Default On** from the dropdown.



5. Next, Set Object Permissions: Go to “Custom Object Settings” → check the checkbox for Read access



6. Set App Permission: Go to “Custom App Settings” → Select Flow Alerts object and then check “Visible” checkbox.

Next, Click on **Save**

Custom App Settings			Required Information		
	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	☒	☐	Marketing CRM Classic (standard__Marketing)	☒	☐
App Launcher (standard__AppLauncher)	☒	☐	Sales (standard__LightningSales)	☒	☐
Automation (standard__FlowsApp)	☒	☐	Sales (standard__Sales)	☒	☒
Bolt Solutions (standard__LightningBot)	☒	☐	Sales Console (standard__LightningSalesConsole)	☒	☐
Business Rules Engine (standard__ExpressionSetConsole)	☒	☐	Salesforce Chatter (standard__Chatter)	☒	☐
Community (standard__Community)	☒	☐	Sample Console (standard__ServiceConsole)	☐	☐
Consumer Goods (standard__Retail)	☒	☐	Service (standard__Service)	☒	☐
Consumer Goods Visit Execution (standard__RetailOnBrowser)	☒	☐	Service Console (standard__LightningService)	☒	☐
Content (standard__Content)	☒	☐	Site.com (standard__Sites)	☒	☐
Digital Experiences (standard__SalesforceCMS)	☒	☐	WDC (standard__Work)	☒	☐
Flow Alerts (Solunus_FA_Flow_Alerts)	☒	☐	Your Account (standard__OnlineSales)	☒	☐
Lightning Usage App (standard__LightningInstrumentation)	☒	☐			

7. **Set field Permissions:** Go to “Field-Level Security” section → Go to “Custom Field-Level security” and click on **View**.

The screenshot shows the Salesforce Setup interface. On the left is a navigation menu with options like 'Setup Home', 'Service Setup Assistant', 'Commerce Setup Assistant', etc. The main content area is titled 'Profiles'. It contains a list of various Salesforce objects, each with a '[View]' link. The 'Custom Field-Level Security' link is highlighted with a red box. Below this, the 'Custom App Settings' table is visible, showing columns for 'Visible' and 'Default' for various apps.

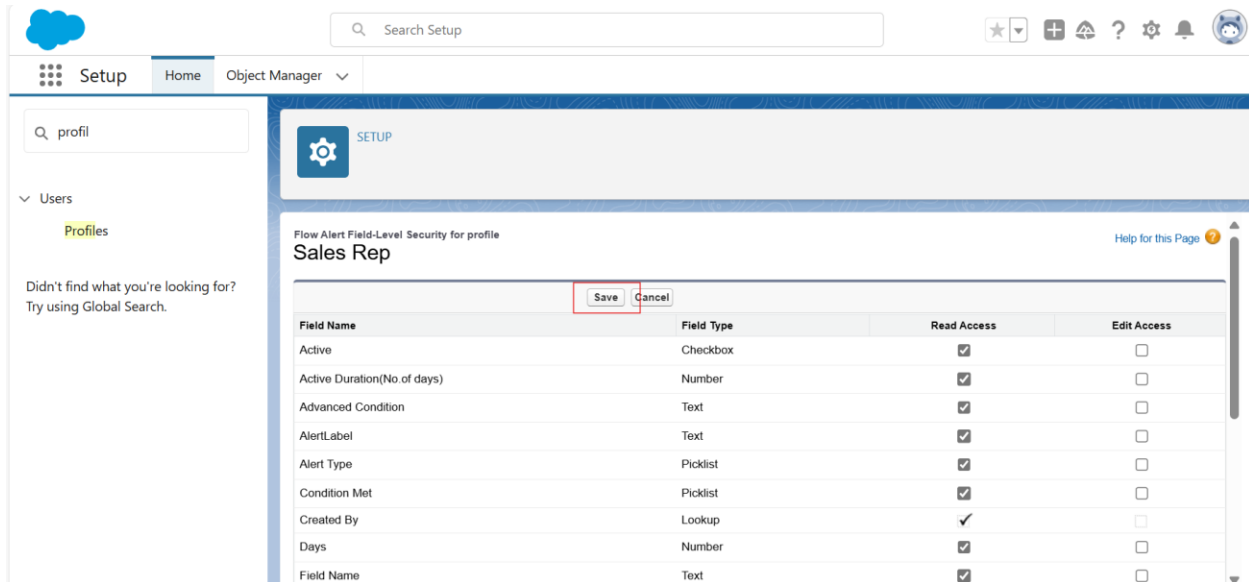
8. Now, select the checkbox under “Read Access” for all the fields.



Sales Rep

Edit Back to Profile			
Field Name	Field Type	Read Access	Edit Access
Active	Checkbox	☒	☐
Active Duration(No.of days)	Number	☒	☐
Advanced Condition	Text	☒	☐
AlertLabel	Text	☒	☐
Alert Type	Picklist	☒	☐
Condition Met	Picklist	☒	☐
Created By	Lookup	☒	☐
Days	Number	☒	☐
Field Name	Text	☒	☐
Field Value	Text	☒	☐
Flow Alert Name	Auto Number	☒	☐
Index	Number	☒	☐
Last Modified By	Lookup	☒	☐
Message	Text	☒	☐
Object Name	Text	☐	☐
Operator	Picklist	☒	☐
Owner	Lookup	☒	☒
Parent Alert	Lookup	☒	☐
Record Type	Record Type	☒	☒
Edit Back to Profile			

9. **Save Changes:** Once you have selected the appropriate permissions, click the "Save" button at the top or bottom of the page to apply the changes.



10. **Verify Access:** To ensure that the permissions have been set correctly, you can log in as a user with the updated profile and attempt to access the object. Verify that the user can perform the actions you granted permissions for.

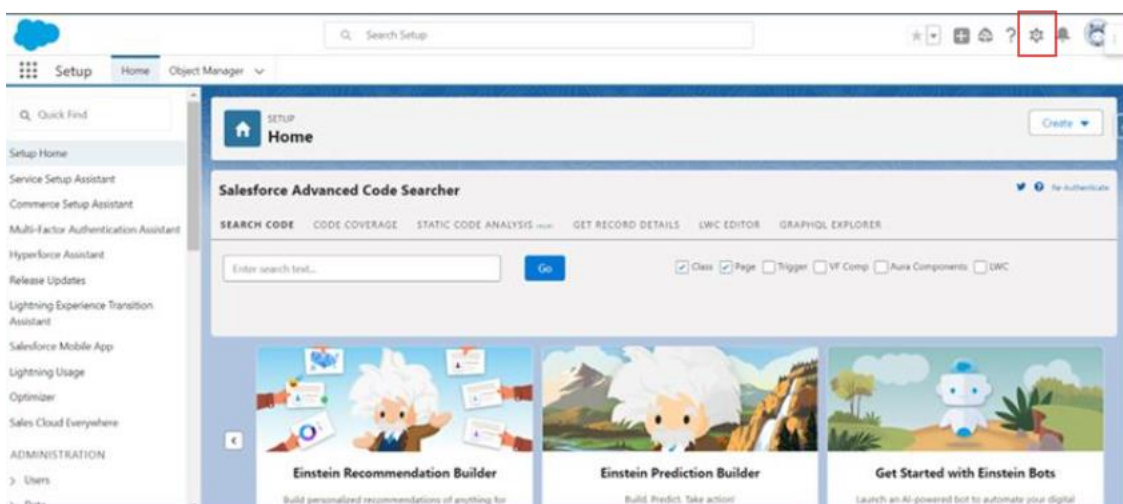
ADDING LWC COMPONENT TO LIGHTNING PAGE

To ensure alerts are displayed on the record page, it is necessary to add the Lightning Web Component (flowAlertComponent) to the Lightning record page. This involves the LWC component designed to display alerts directly onto the desired record page. By doing so, users will be able to see relevant alerts on the record page. To do that, need to follow the below steps:

STEPS TO ADD LWC COMPONENT TO LIGHTNING RECORD PAGE:

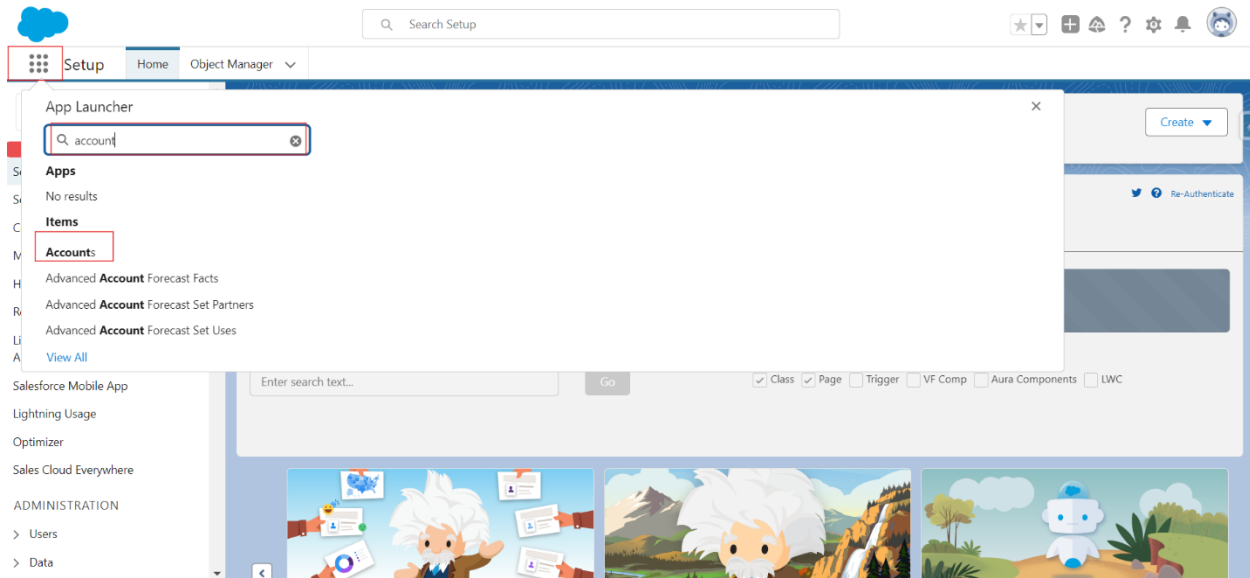
Steps to add the Lightning Web Component (LWC) to the Lightning record page. Simply drag and drop the component(**flowAlertComponent**) onto the respective objects to display the alerts.

1. Navigate to the Salesforce Setup page

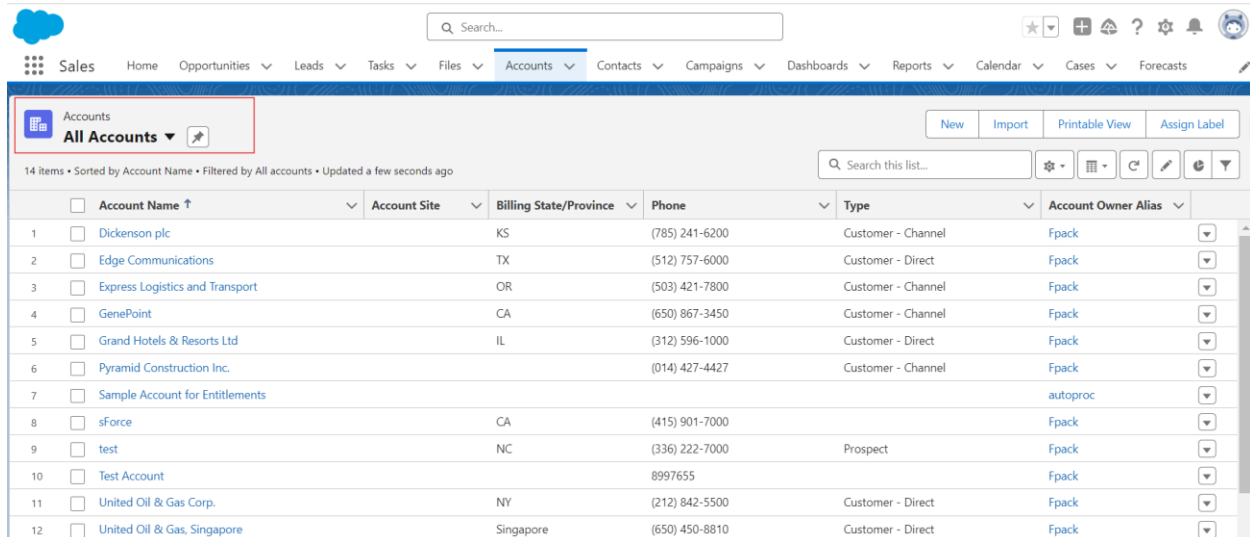


Note: To add an LWC component to any Salesforce object, such as an Account, follow the process outlined in the guide.

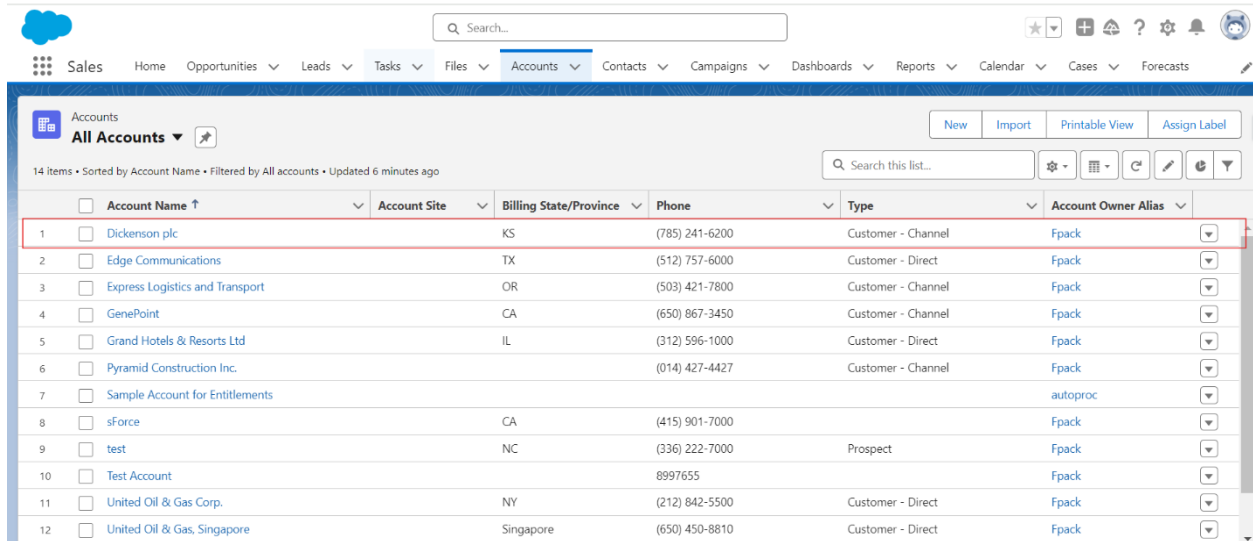
2. Go to App launcher >> Search for Account >> Click on Account



3. **Navigate to Object:** Go to the specific object where you want to edit records (e.g., Accounts, Contacts, Opportunities).

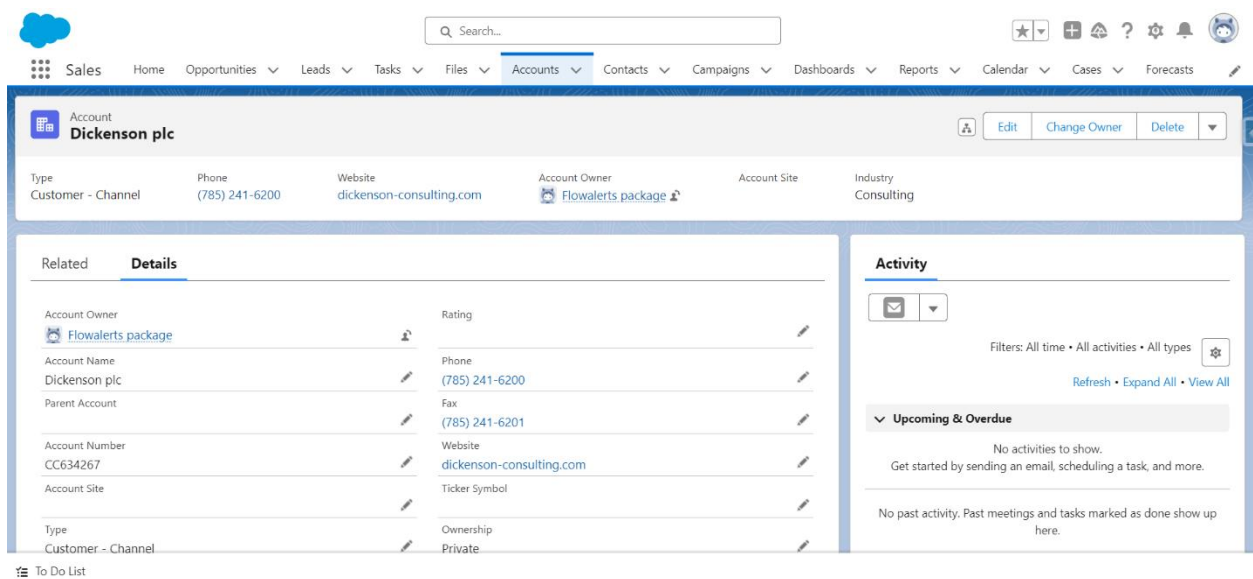


4. **Locate Record:** Find the record you wish to edit within the object list.



	Account Name ↑	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
1	☐ Dickenson plc		KS	(785) 241-6200	Customer - Channel	Fpack
2	☐ Edge Communications		TX	(512) 757-6000	Customer - Direct	Fpack
3	☐ Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	Fpack
4	☐ GenePoint		CA	(650) 867-3450	Customer - Channel	Fpack
5	☐ Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	Fpack
6	☐ Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	Fpack
7	☐ Sample Account for Entitlements					autoproc
8	☐ sForce		CA	(415) 901-7000		Fpack
9	☐ test		NC	(336) 222-7000	Prospect	Fpack
10	☐ Test Account			8997655		Fpack
11	☐ United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	Fpack
12	☐ United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	Fpack

5. **Open Record:** Click on the record's name to open its detail page.



Account: Dickenson plc

Type: Customer - Channel | Phone: (785) 241-6200 | Website: dickenson-consulting.com | Account Owner: Flowalerts package | Account Site: | Industry: Consulting

Details

Account Owner	Flowalerts package	Rating	
Account Name	Dickenson plc	Phone	(785) 241-6200
Parent Account		Fax	(785) 241-6201
Account Number	CC634267	Website	dickenson-consulting.com
Account Site		Ticker Symbol	
Type	Customer - Channel	Ownership	Private

Activity

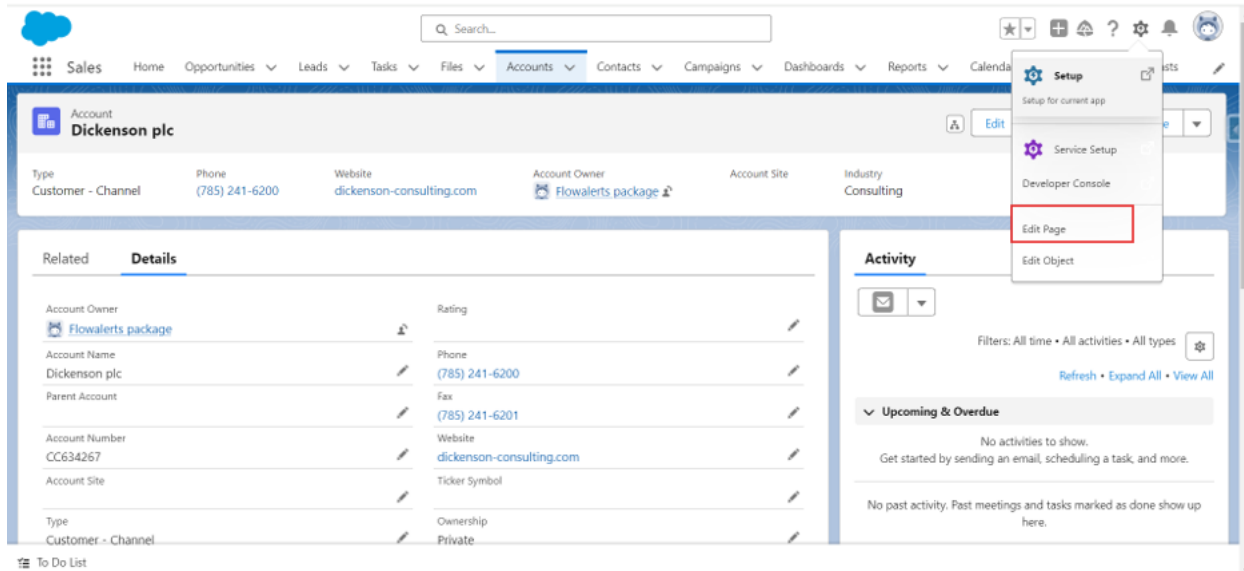
Filters: All time • All activities • All types

Upcoming & Overdue

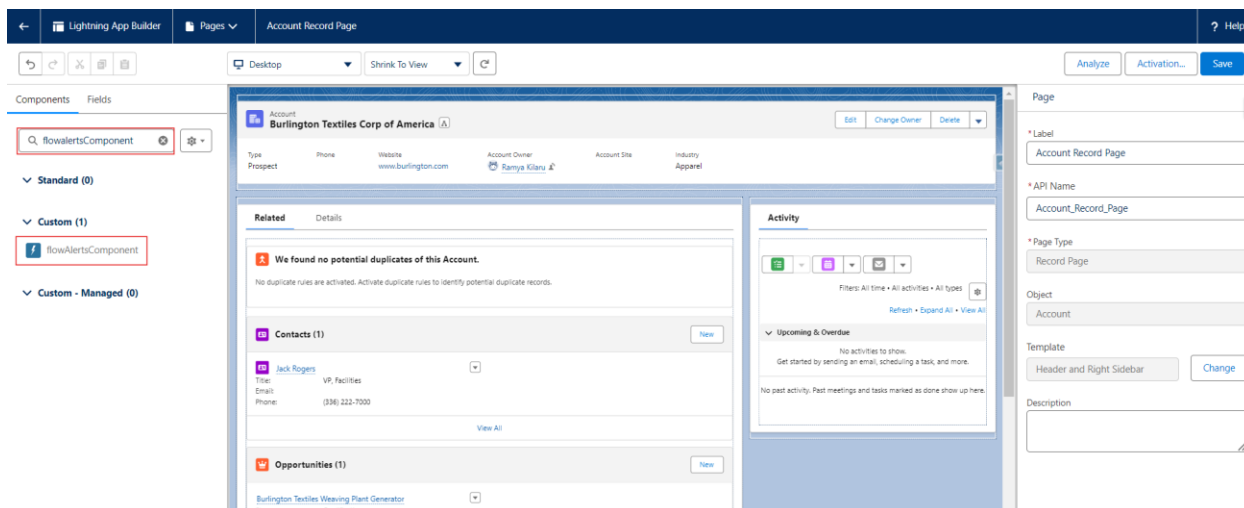
No activities to show.
Get started by sending an email, scheduling a task, and more.

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

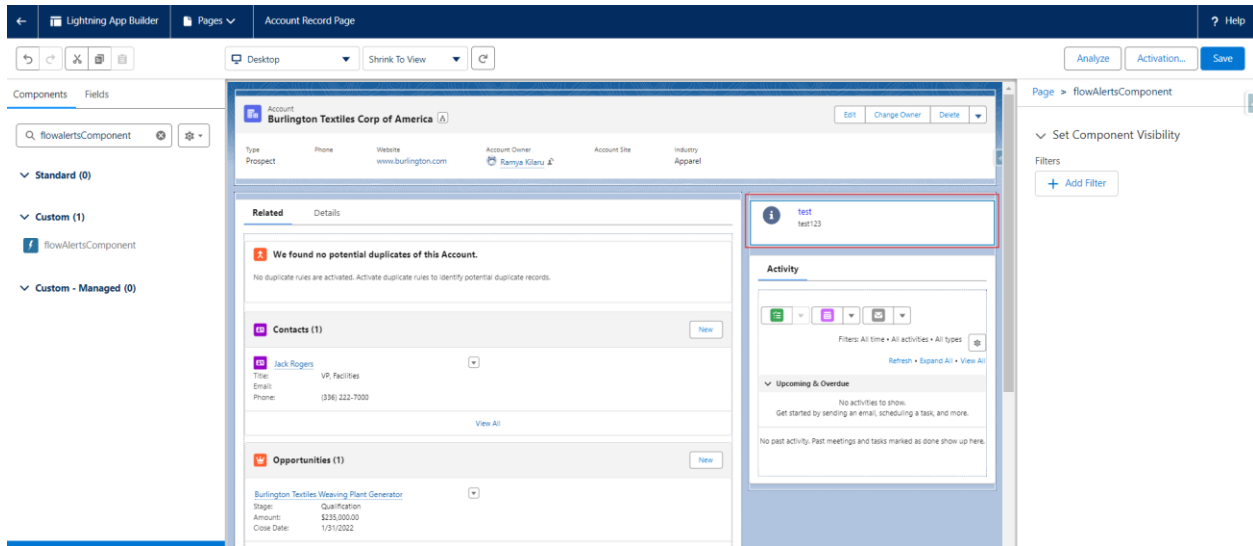
6. **Access Edit Page:** Look for and click the "Edit" button or link typically located near the top of the record detail page. Click on edit page



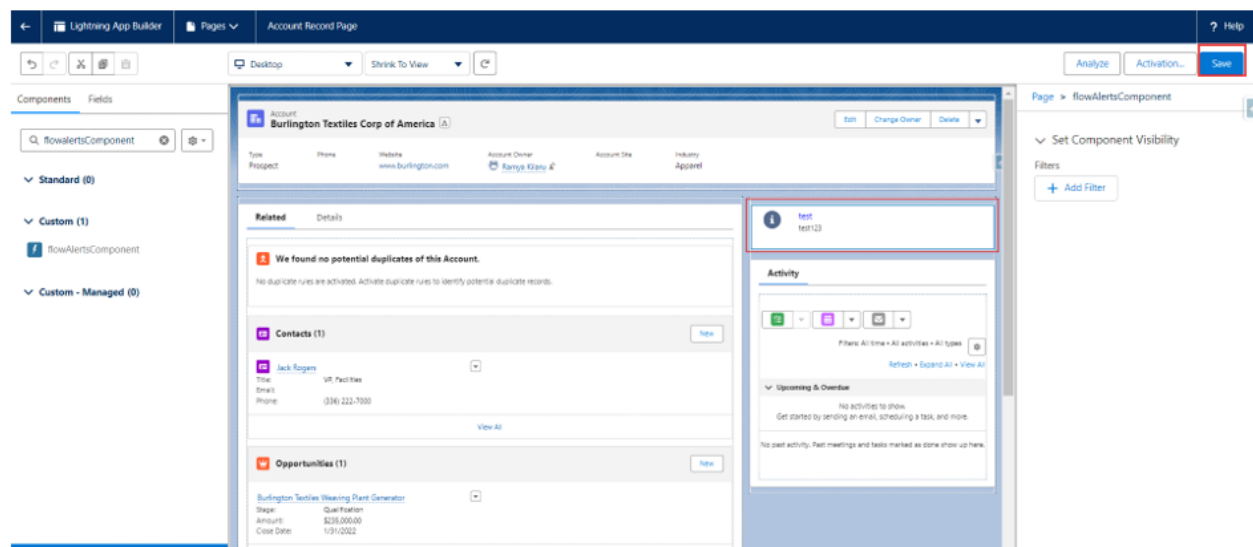
7. Make Changes:. Search for “flowAlertComponent”



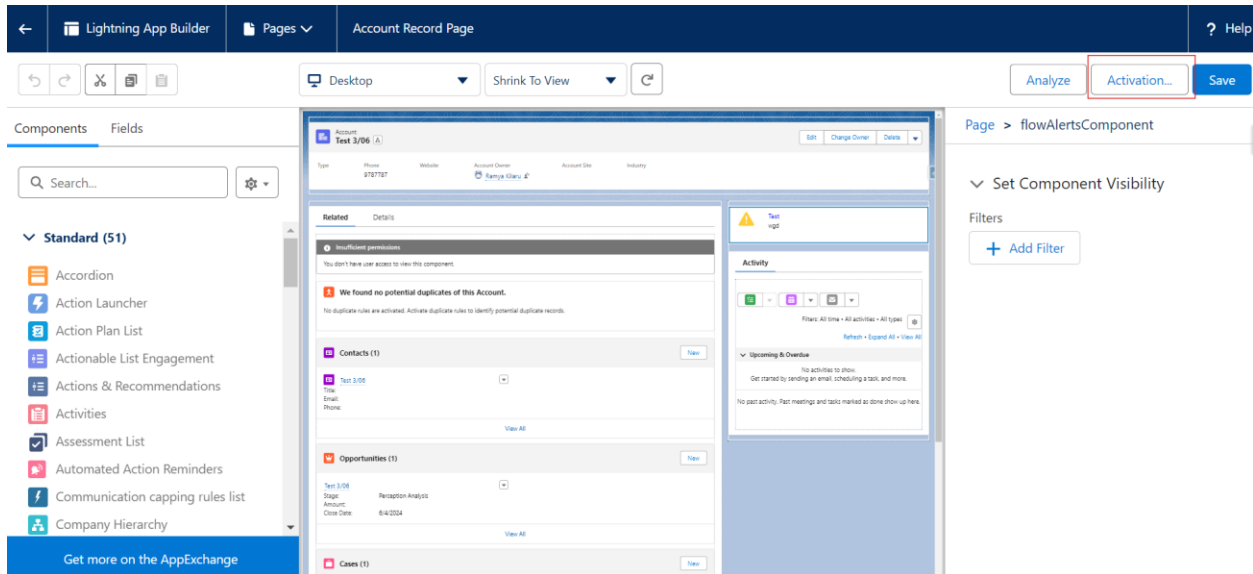
8. Drag the LWC component (*flowAlertComponent*) onto the desired location on the Lightning record page.



9. Save Changes Once placed and configured the component, click on the "Save" button to save your changes.



10. Activate the Page: After saving, click on the "Activation" button to activate the changes made to the Lightning record page.

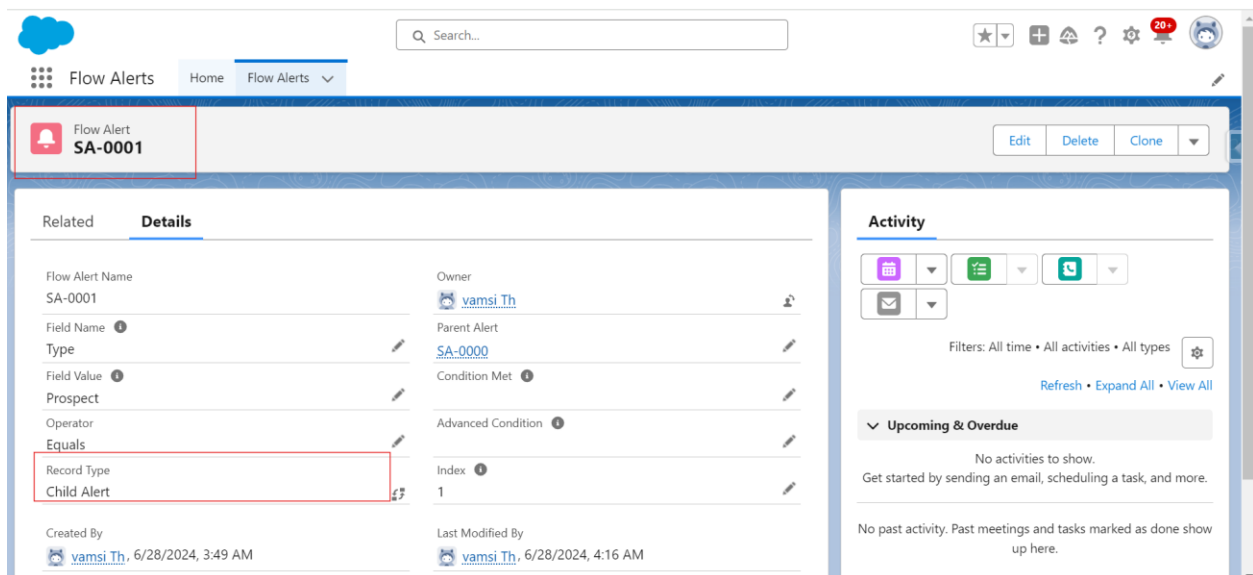


By following the above steps, it will allow you to seamlessly add an LWC component to a Lightning record page in Salesforce. After successfully adding and activating the flow we can see alerts on the record detail page

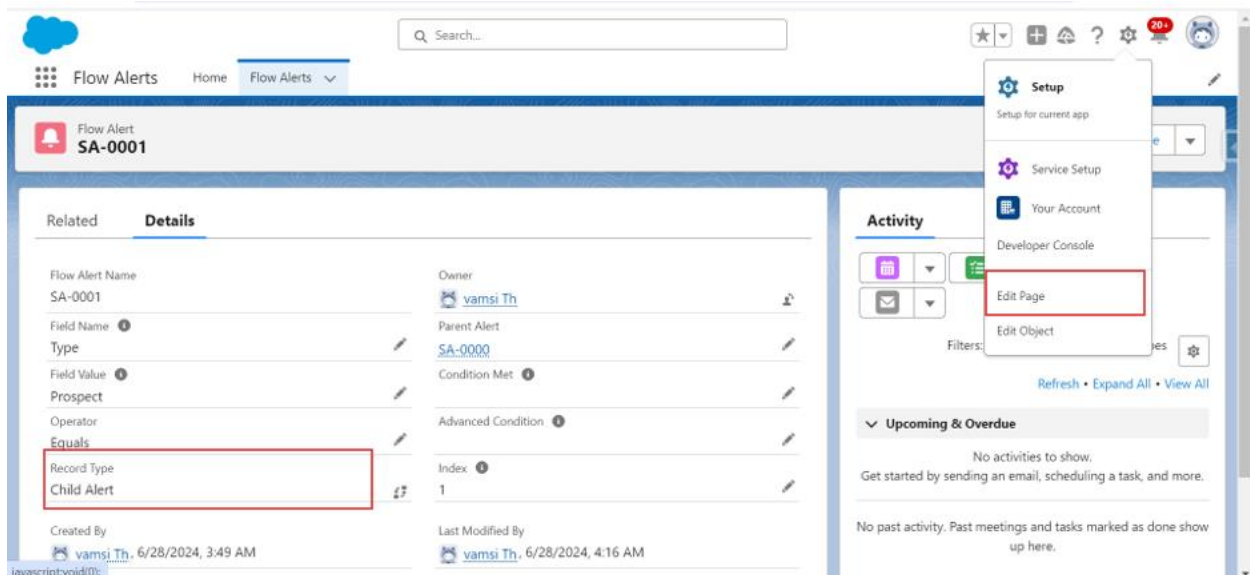
ASSIGNING LIGHTNING RECORD PAGES TO THE RESPECTIVE LAYOUTS

STEPS TO ADD LIGHTNING RECORD PAGE(CHILDALERTRECORDPAGE) TO THE RESPECTIVE CHILD LAYOUT.

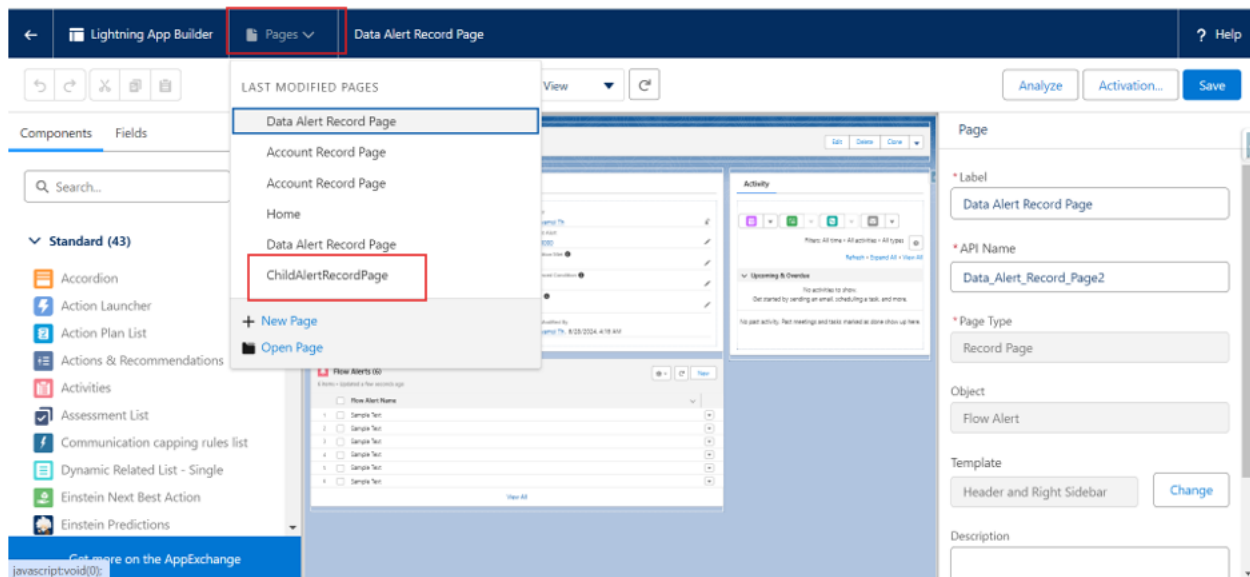
1.Go to a flow alert object with record type as child alert



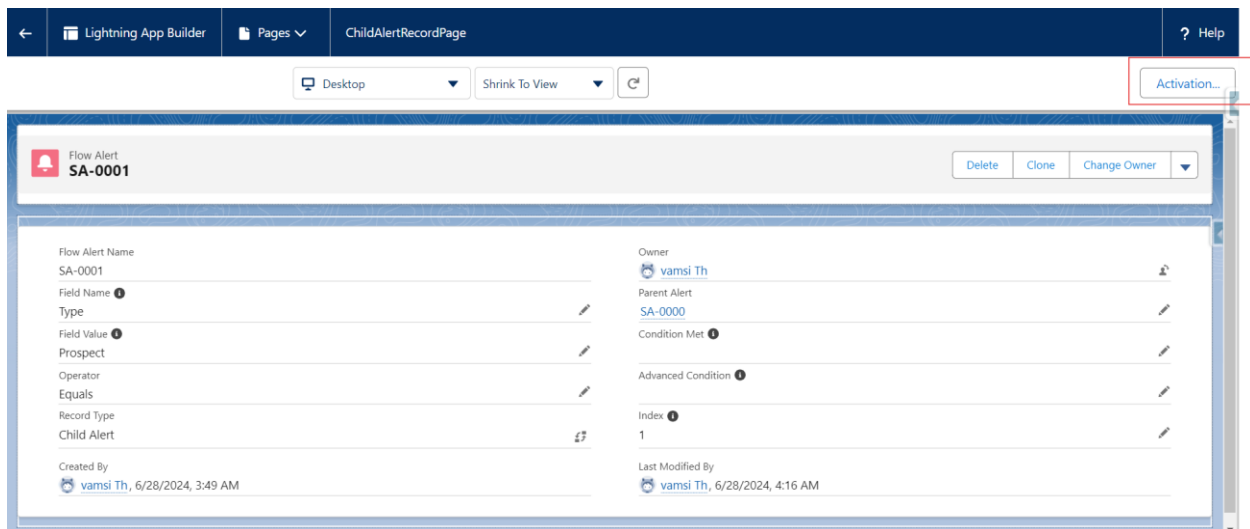
2.Go to Edit page



3. Select Edit page → Click pages dropdown → Then select ChildAlertRecordPage

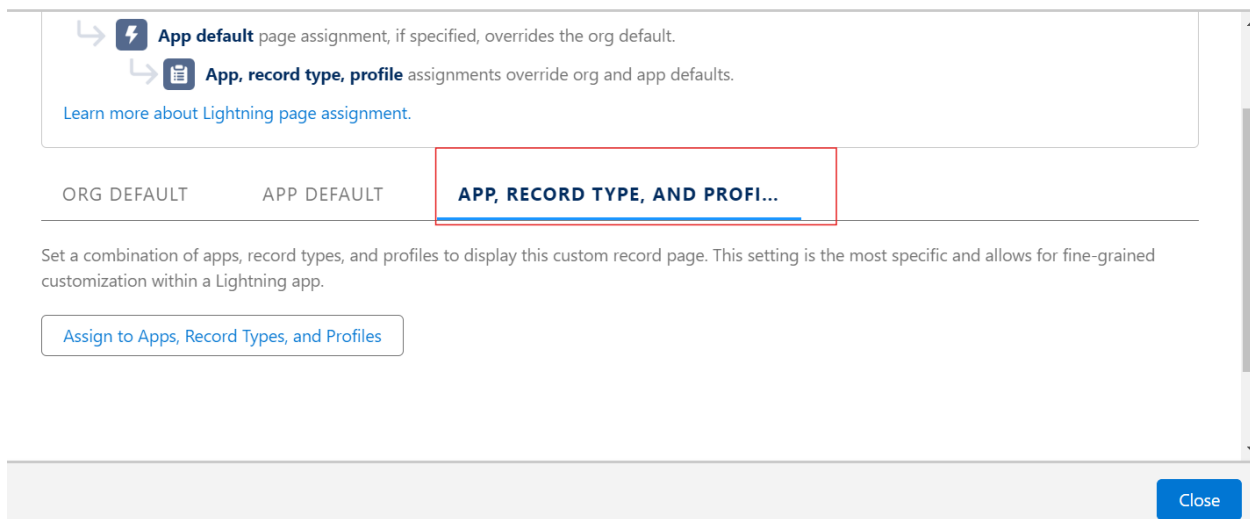


4. Click on Activation



5. Select App, Record Type and profiles

Activation: ChildAlertRecordPage



6. Select "Flow Alerts" checkbox and click on "Next" button

Select Apps

First, select the apps to display the "ChildAlertRecordPage" record page.

Lightning Apps (12)

App Name	Description
☐ Business Rules Engine	Create and maintain business rules that perform complex lookups and ...
☒ Flow Alerts	
☐ FlowsApp	Automate business processes and repetitive tasks.
☐ LightningBolt	Discover and manage business solutions designed for your industry.
☐ LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience

7. Select **Desktop** and click on **Next**

Select Form Factor

For each app, select the form factor that you want the page to apply to.

Lightning Apps (1)

App Name	FORM FACTOR
Flow Alerts	☐ Desktop and phone ☒ Desktop ☐ Phone

8. Now, Select the "Child Alert" checkbox. Click Next

Selected Record Types

Select the record types to display the "ChildAlertRecordPage" record page.

Record Types (3)		1 Selected
RECORD TYPE	Description	
☐ Master		
☒ Child Alert		
☐ Parent Alert		

Cancel

Back

Next

9. Select the "System Administrator" profile and click Next button.

Selected Profiles

Select the profiles to display the "ChildAlertRecordPage" record page.

Profiles (27)		1 Selected
PROFILE	Description	
☐ Read Only		
☐ Solution Manager		
☐ Standard Platform User		
☐ Standard User		
☒ System Administrator		

Cancel

Back

Next

10. Click on **Save**. This will activate the page.

Review Assignments

Review the app, record type, profile and form factor combinations that will display the "ChildAlertRecordPage" record page.

Review Assignments (1)					
APP	RECORD TYPE	PROFILE	FORM FACTOR	Current Page	New Page
Flow Alerts	Child Alert	System Administrator	Desktop	Data Alert Record Page	ChildAlertRecordPage

Cancel

Back

Save

*****END OF PART 1*****

*The user manual has been divided into two parts to meet the document size requirements for uploading to Salesforce Security Review. This is the **end of Part 1**. Please proceed to **Part 2** for the continuation.*