SOLUNUS
Enabling Customer Success

FLOW ALERT
(User Manual – Part 1)

salesforce
PARTNER
SINCE 2014

Contents

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:

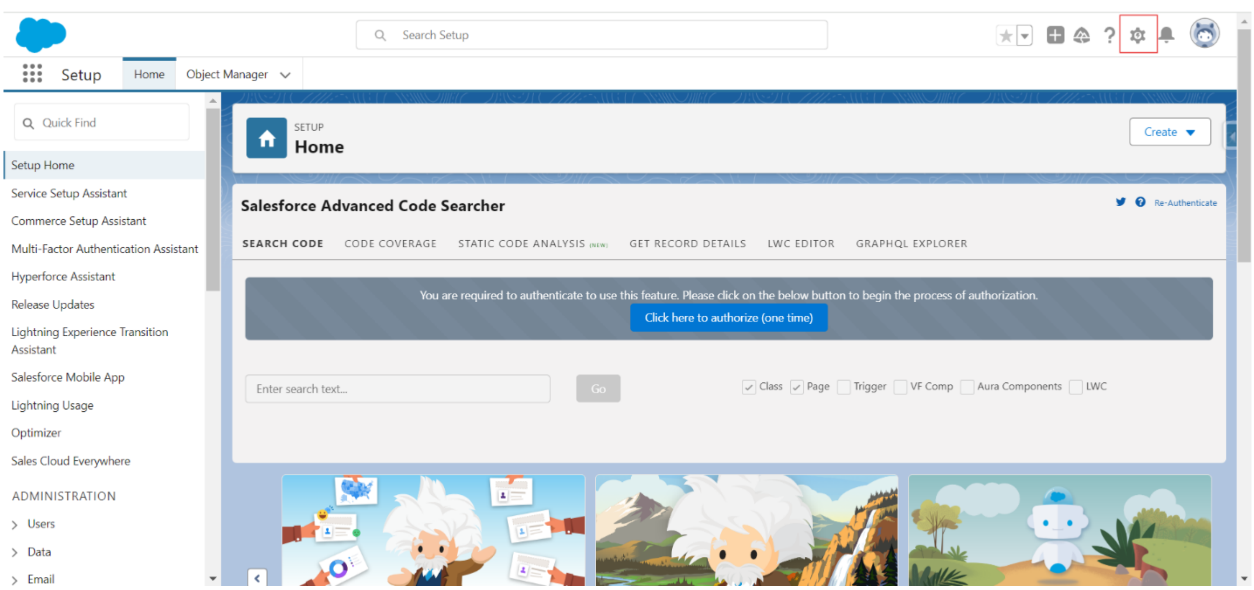
ACTIVATING FLOWS

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

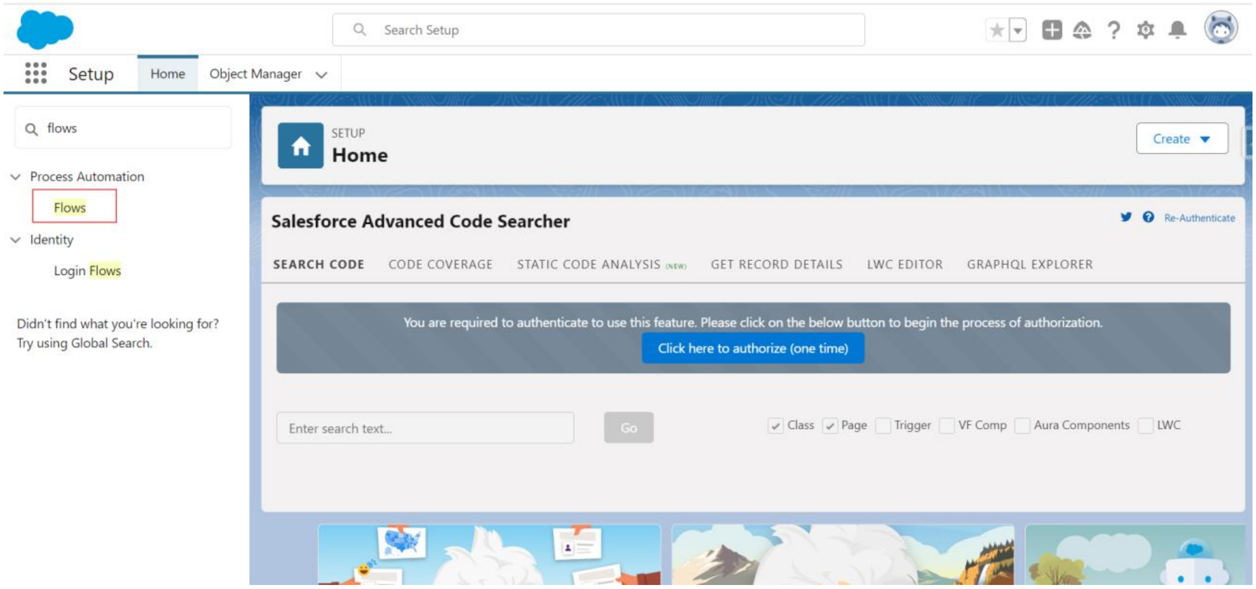
STEPS TO ACTIVATE THE FLOWS:

***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.*

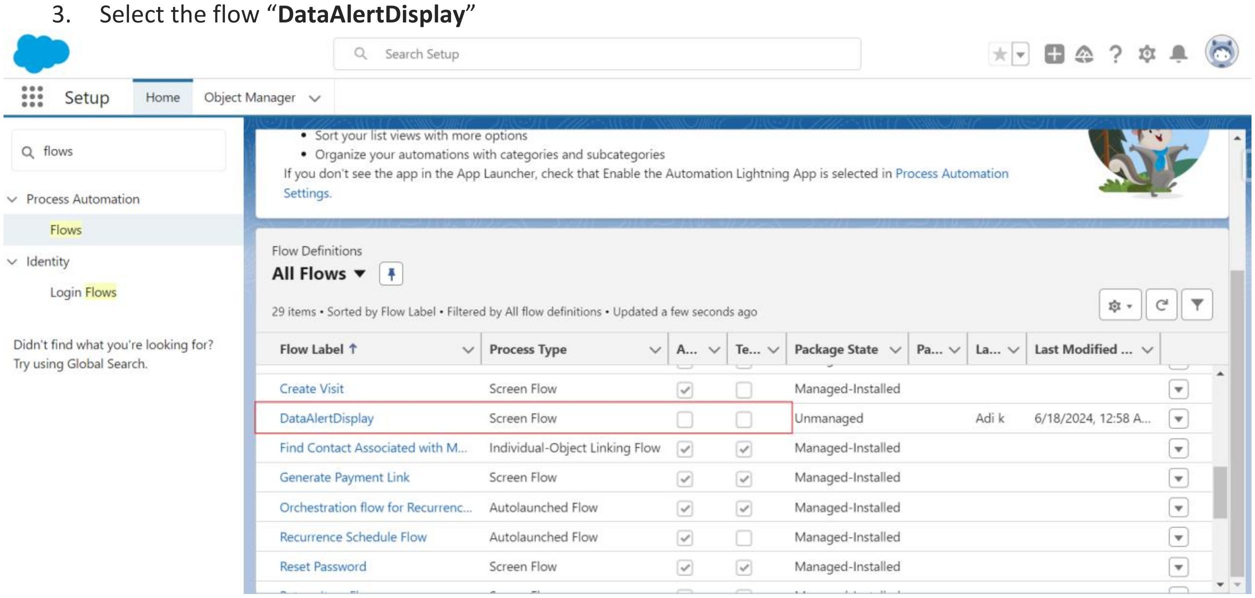
1. Navigate to Setup by clicking the gear icon at the top right and selecting Setup.



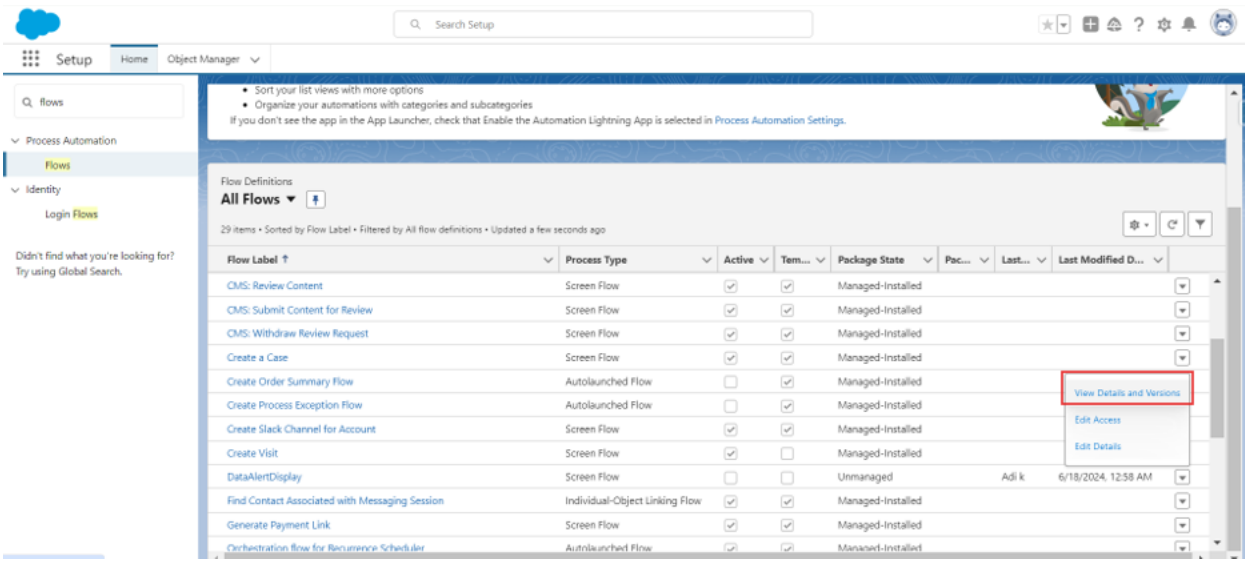
2. In the Quick Find box, type Flows and select **Flows**.



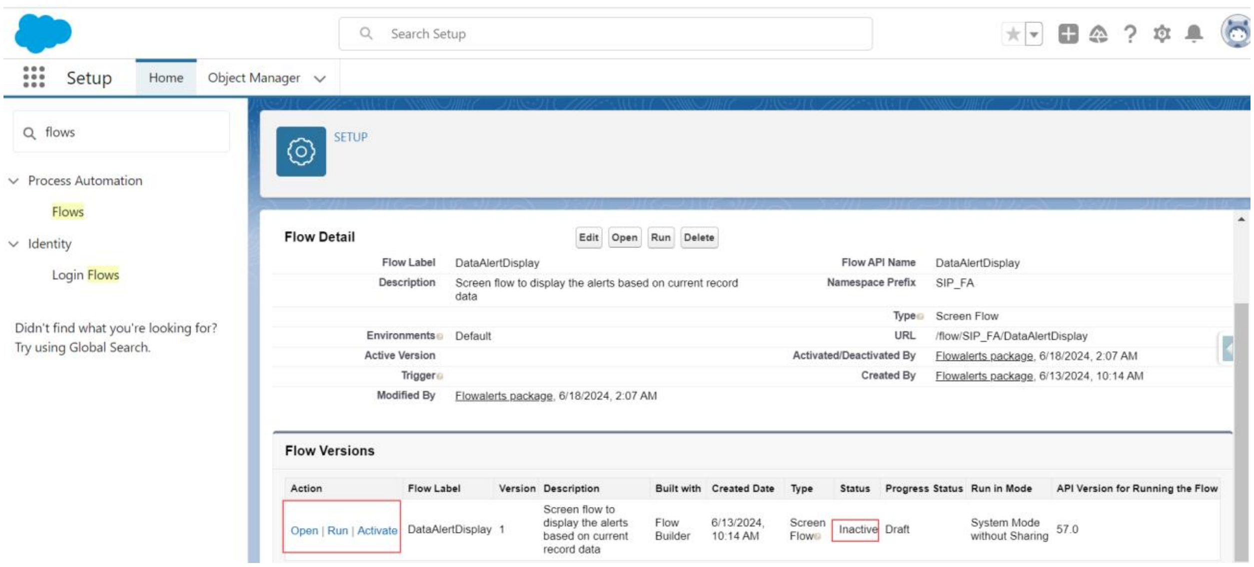
3. Select the flow "**DataAlertDisplay**"



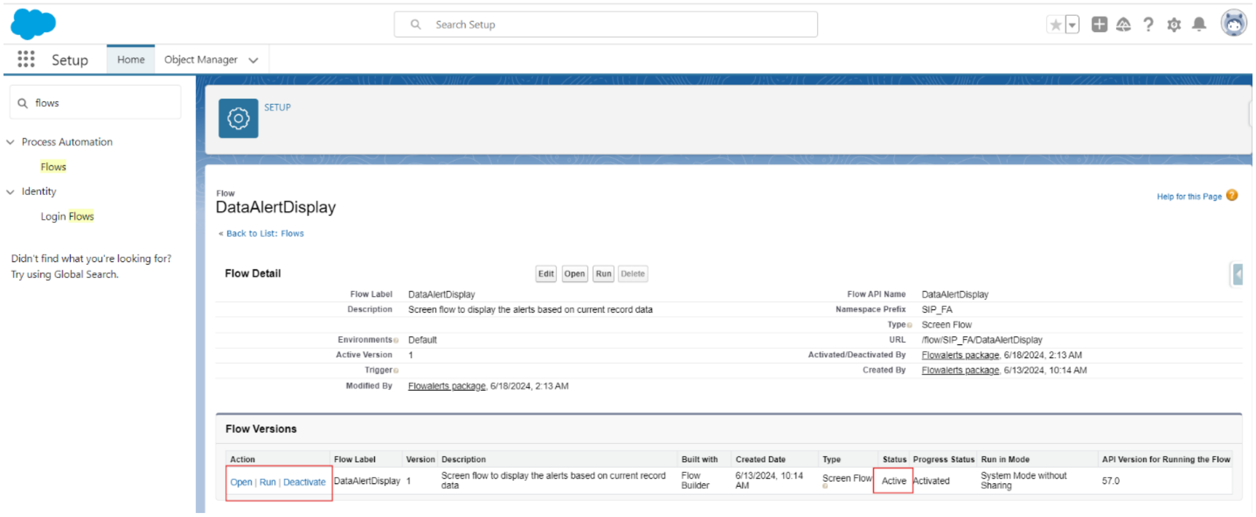
4. Click on "**View Details and Versions**".



5. Click on "**Activate**". This will activate the flow.



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

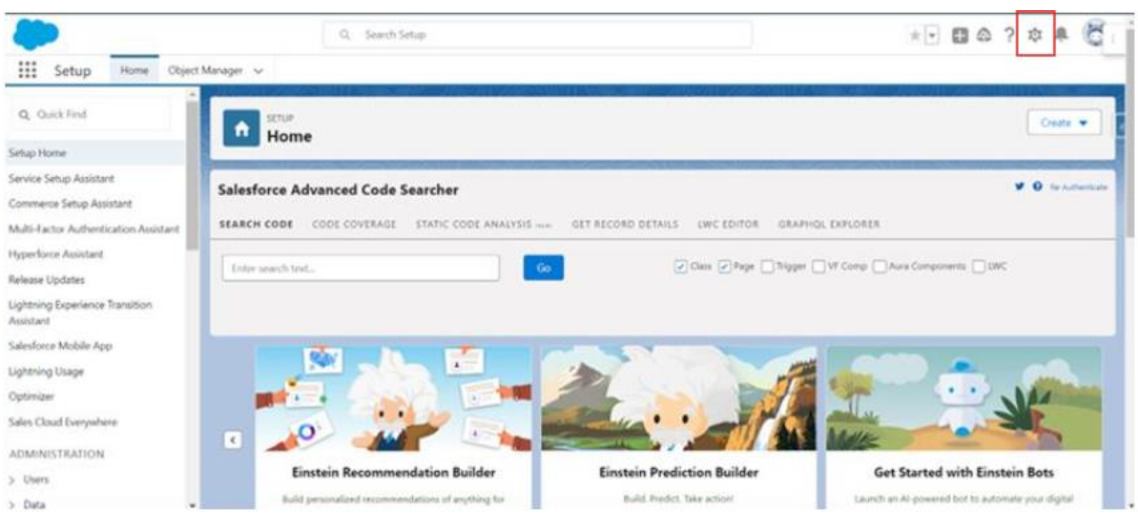


GIVING ACCESS TO FLOW AT PROFILE LEVEL

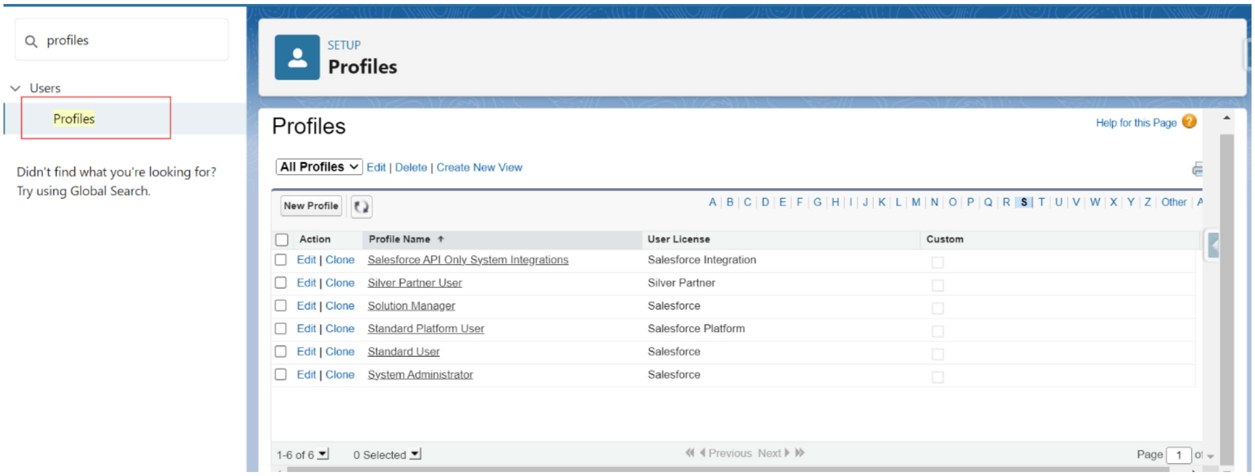
To enable users to view alerts, it is essential to grant access to flows at the profile level. This ensures that all necessary permissions are in place for users to interact with and benefit from flow alerts. Please follow these steps:

STEPS TO GIVE ACCESS TO FLOW FOR PROFILES:

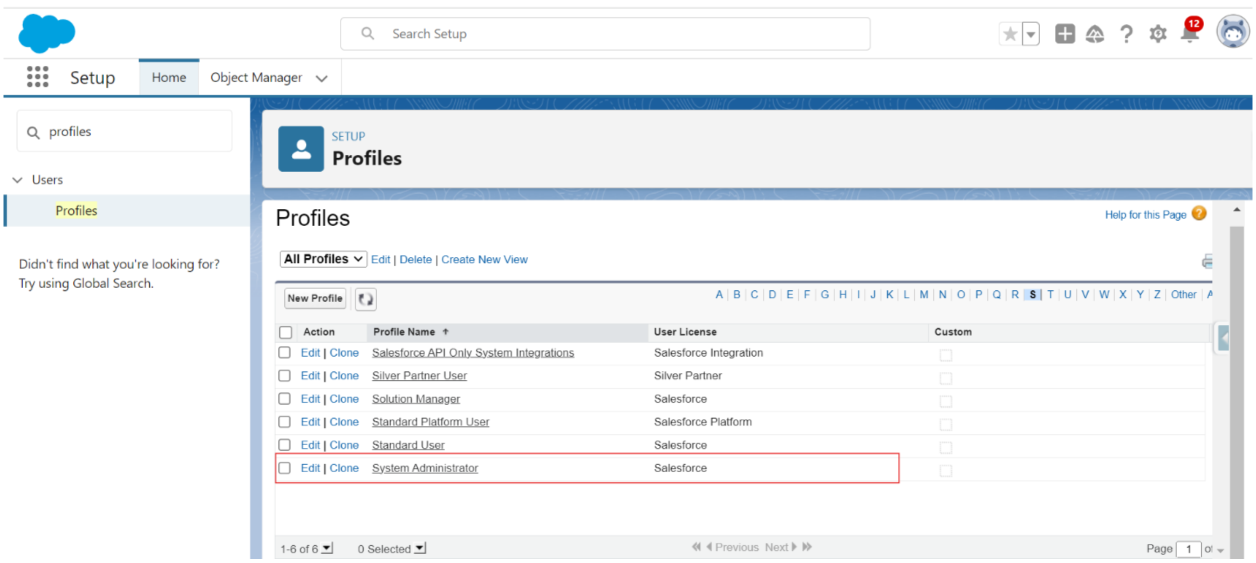
1. Navigate to Setup by clicking the gear icon at the top right and selecting Setup.



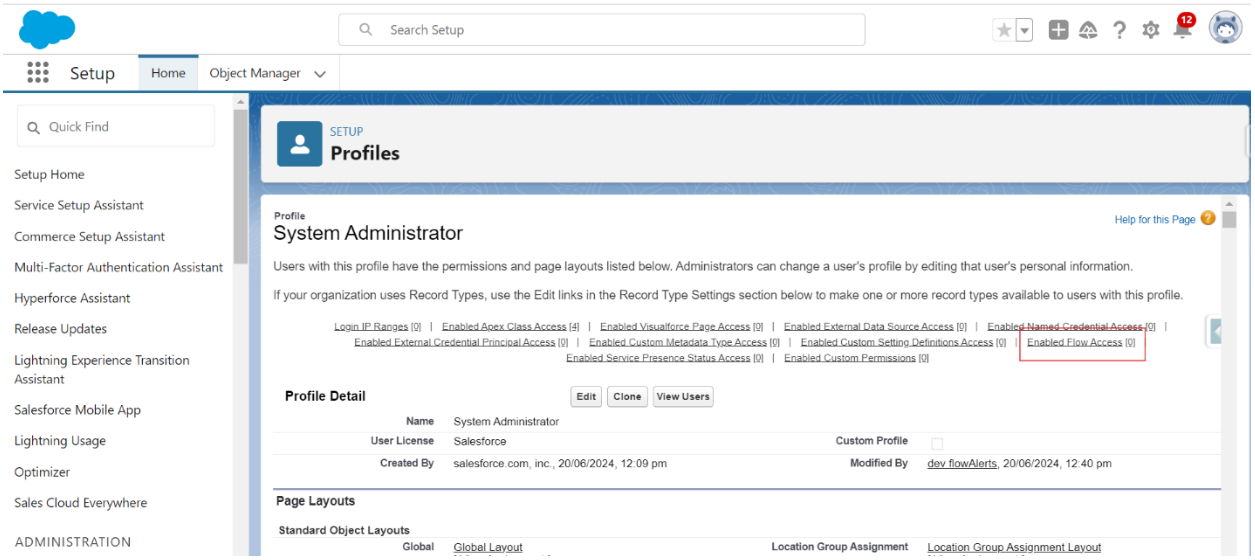
2. In the Quick Find box, type profiles and select profiles.



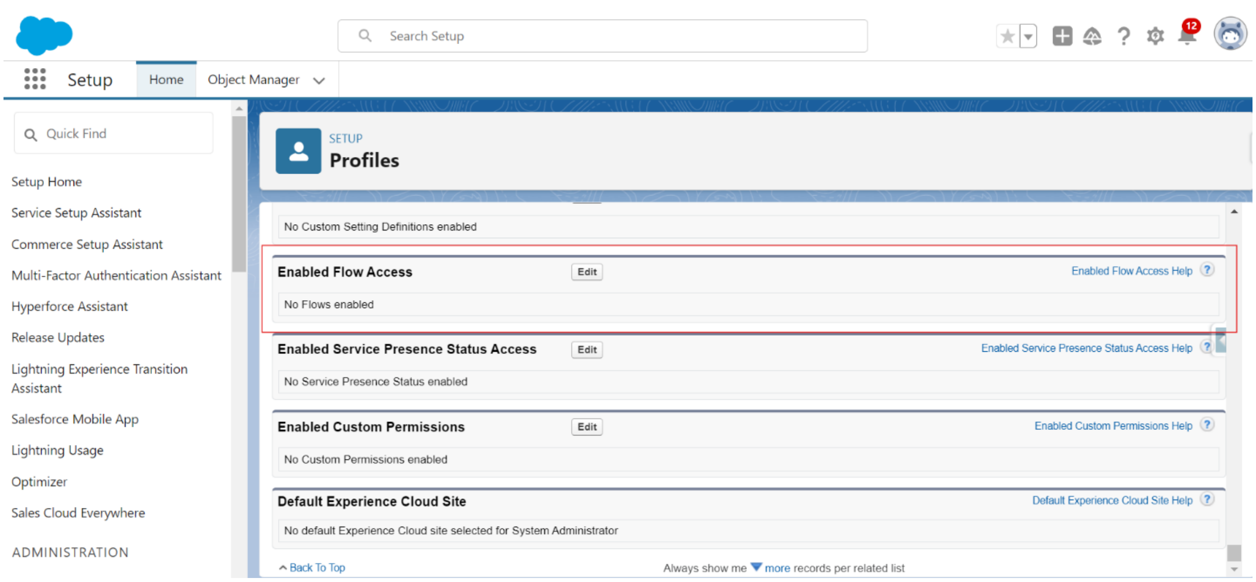
3. Select" **System Administrator**" profile.



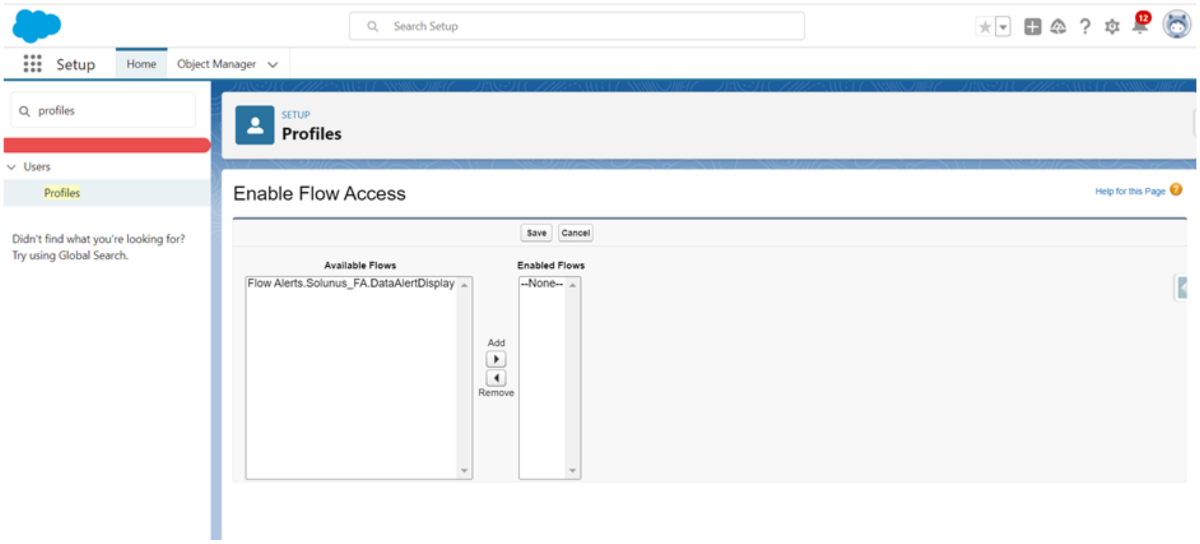
4. Once in the selected profile, navigate to "*Enabled Flow Access*" section. You can do this by clicking on the "Enabled Flow Access" link.

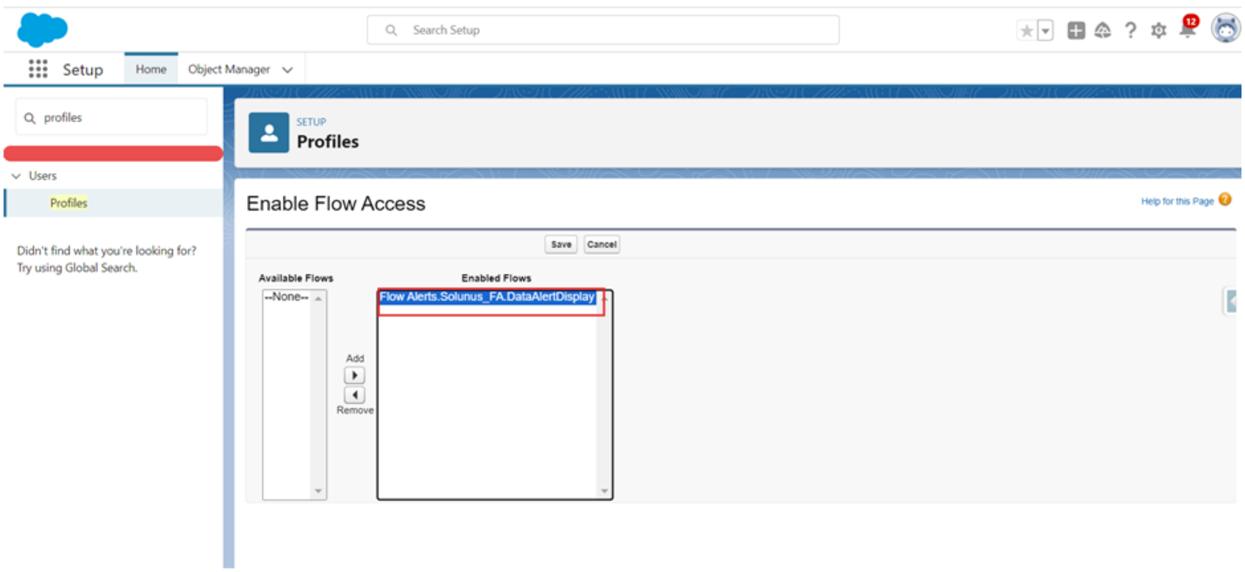


5. Next, Click on **Edit**.

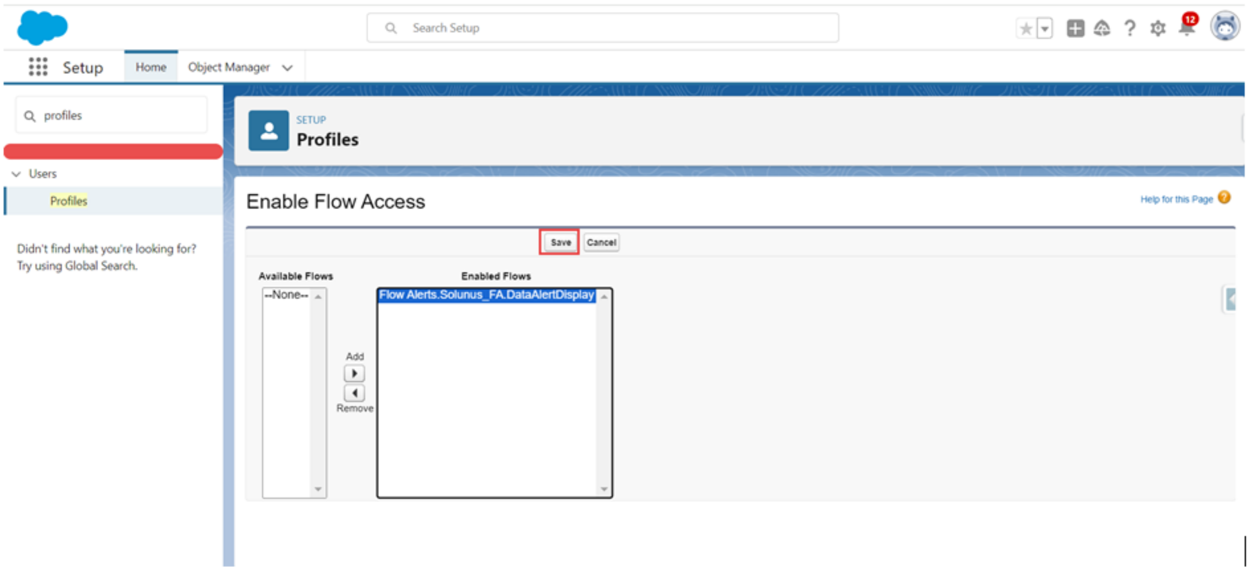


6. Select the Flow" *FlowAlerts.Solunus_FA.DataAlertDisplay*" from the Available Flows and click on "Add"



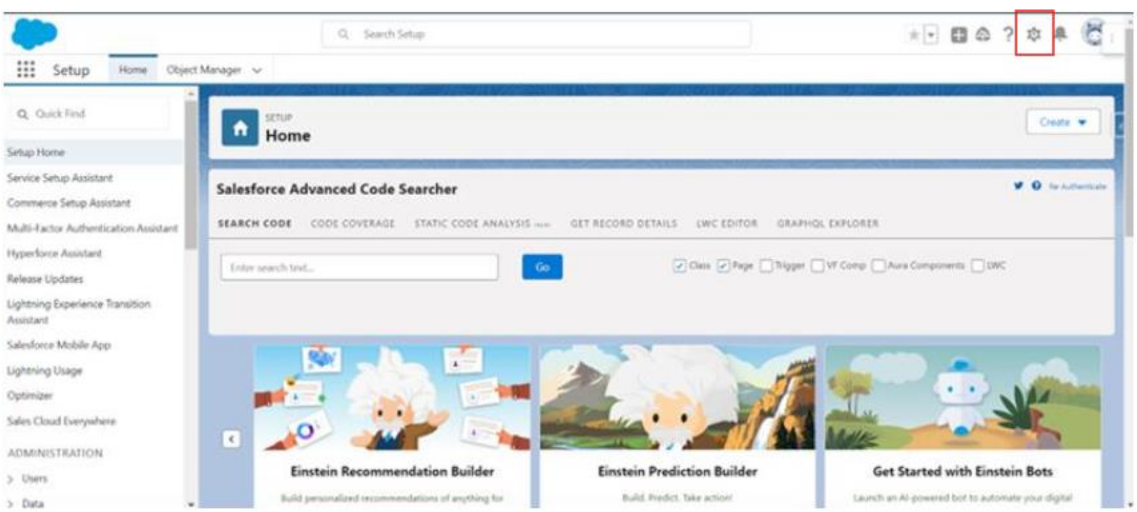


7. Click on **Save.** This will give access to “**DataAlertDisplay**”.

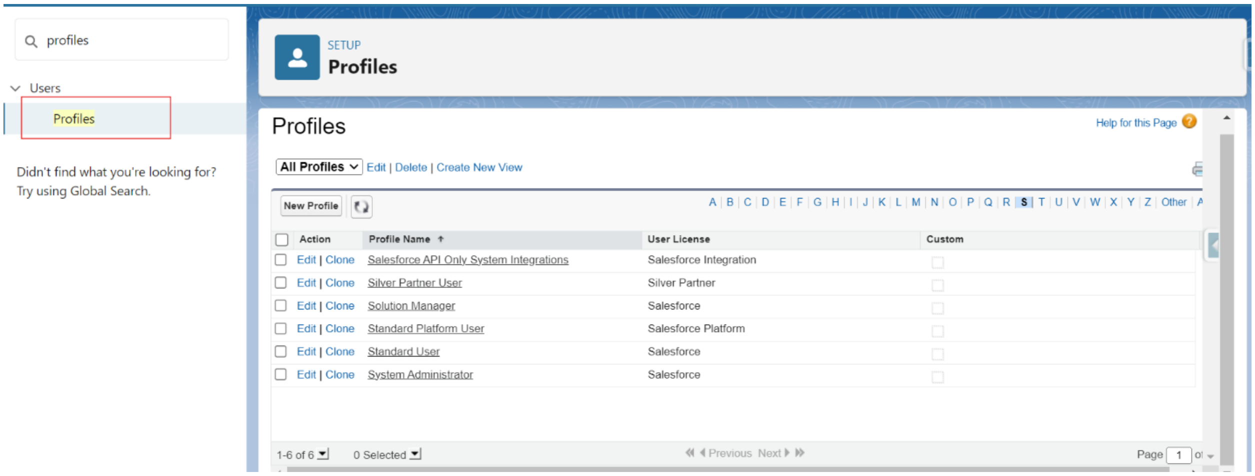


PROVIDING ACCESS TO APEX CLASS AT PROFILE LEVEL

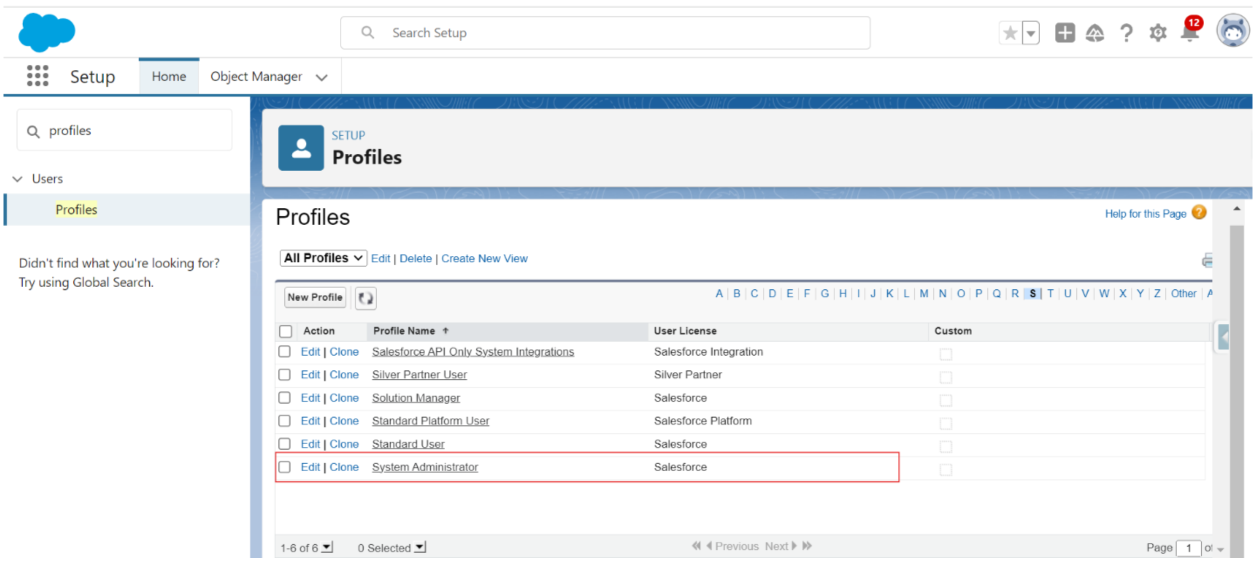
1. Navigate to Setup by clicking the gear icon at the top right and selecting Setup.



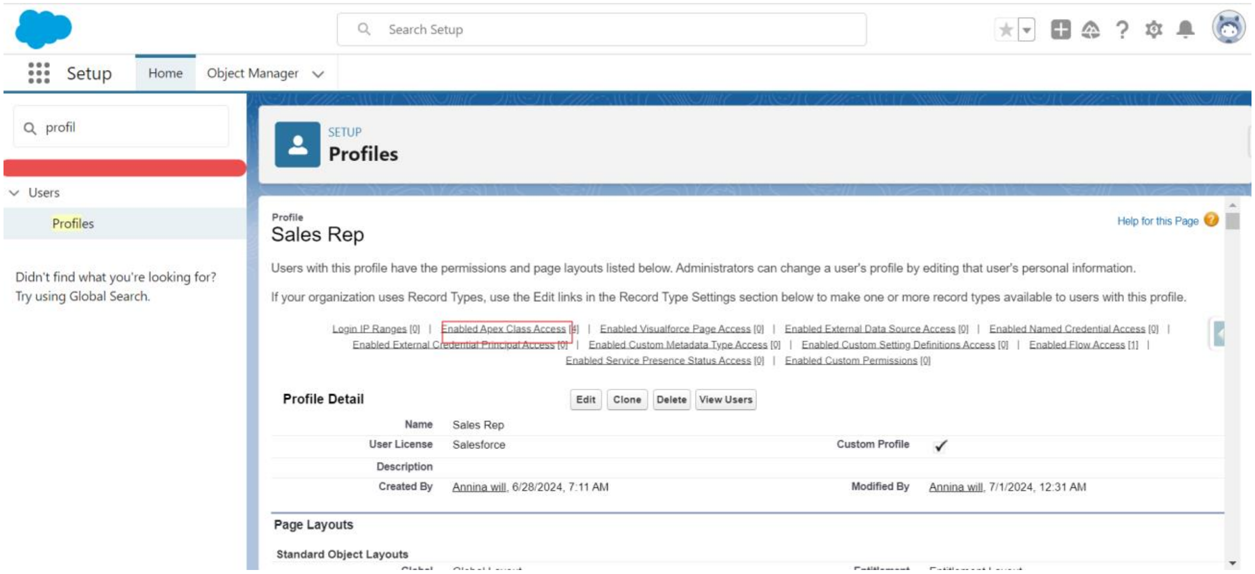
2. In the Quick Find box, type profiles and select profiles.



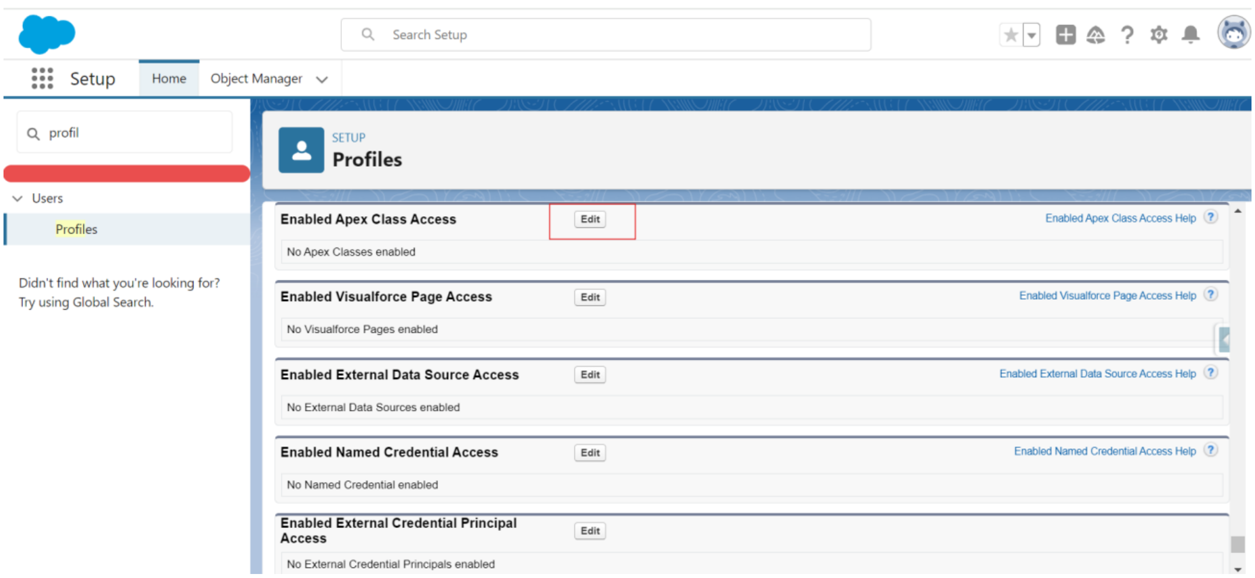
3. Select" **System Administrator**" profile.



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**.



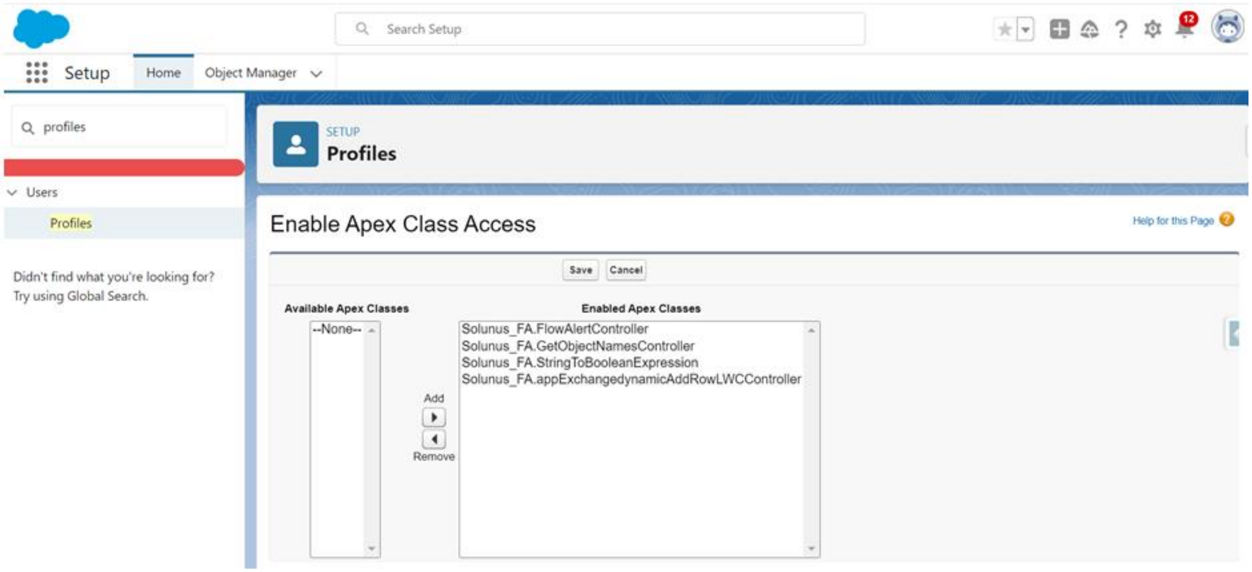
6. Select the below apex classes and add to Enabled Apex classes

   Solunus_FA.FlowAlertController

   Solunus_FA.GetObjectNamesController

   Solunus_FA.StringToBooleanExpression

   Solunus_FA.appExchangedynamicAddRowLWCController



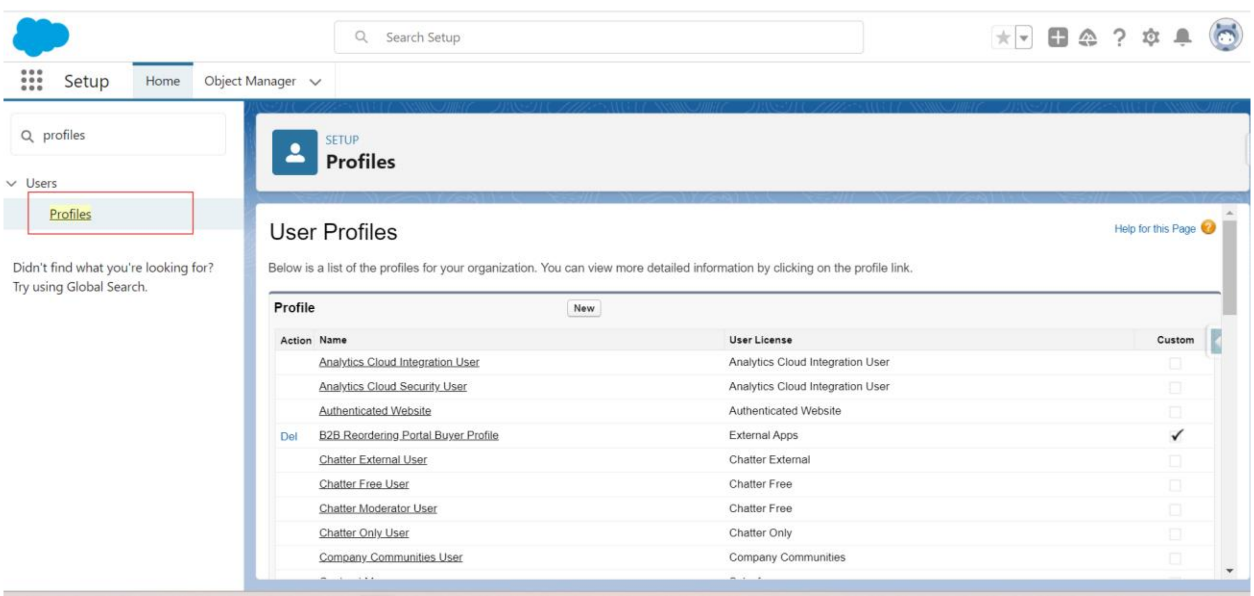
7. Click on **Save**.

PROVIDING ACCESS TO FLOW ALERT OBJECT AT PROFILE LEVEL

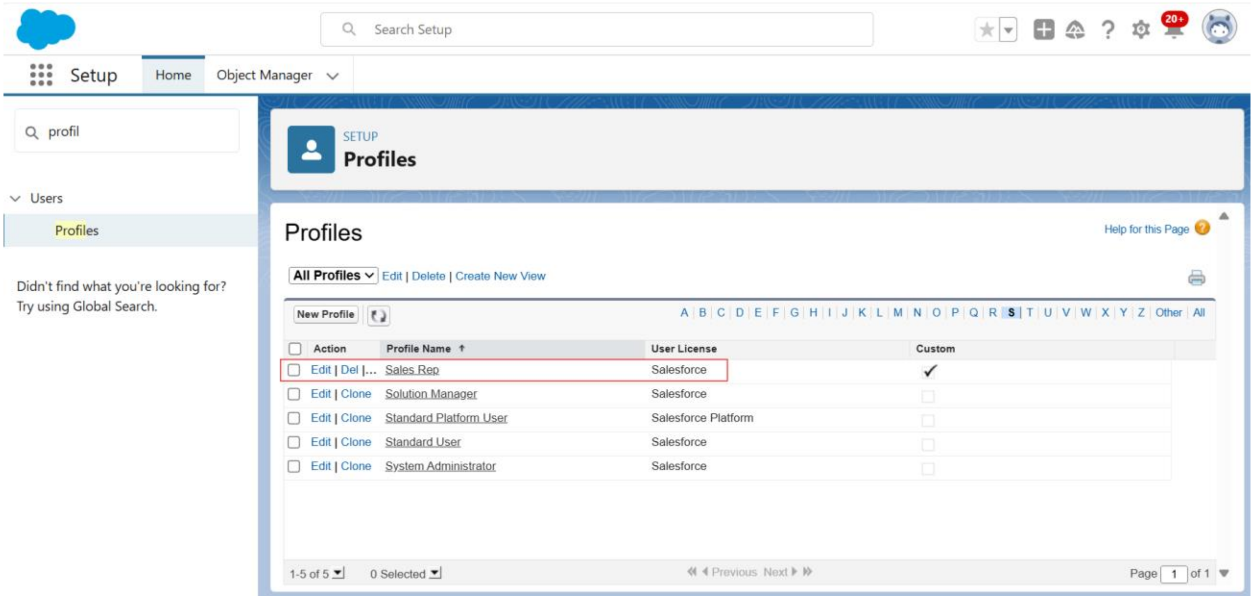
To ensure that end users can view object records, it is necessary to add the "Flow Alert “Object Access permission to their profiles. This permission will enable us to view the required object records. To achieve this, we need to follow below steps:

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

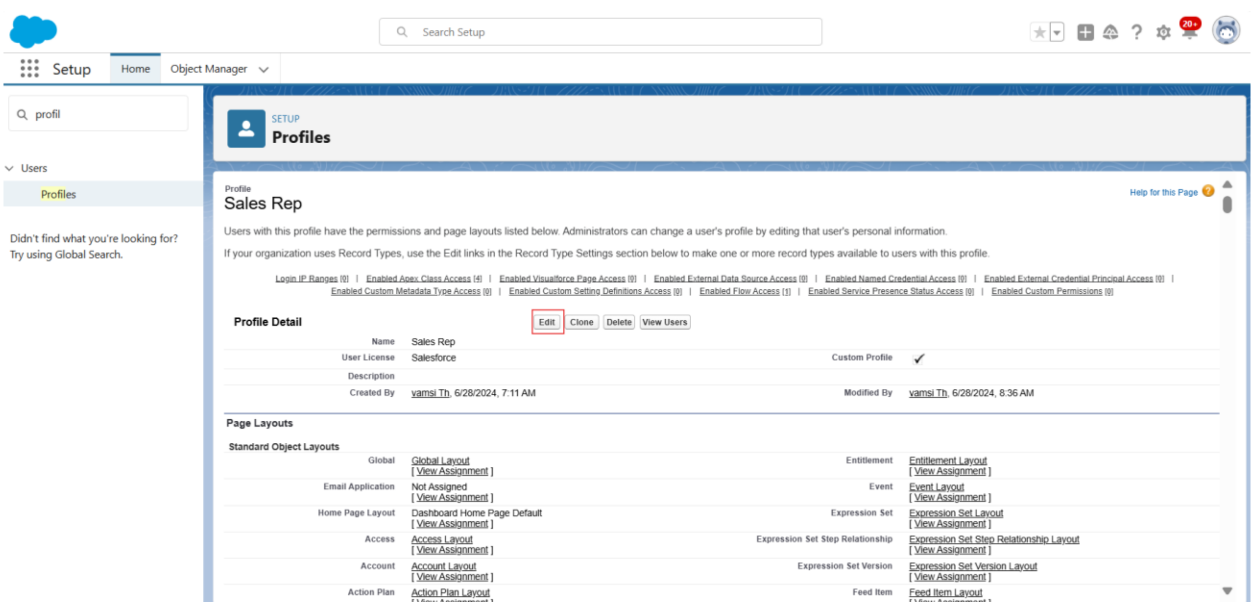
1. In the Setup search box, type "Profiles" and click on "Profiles" under the "Users" section.



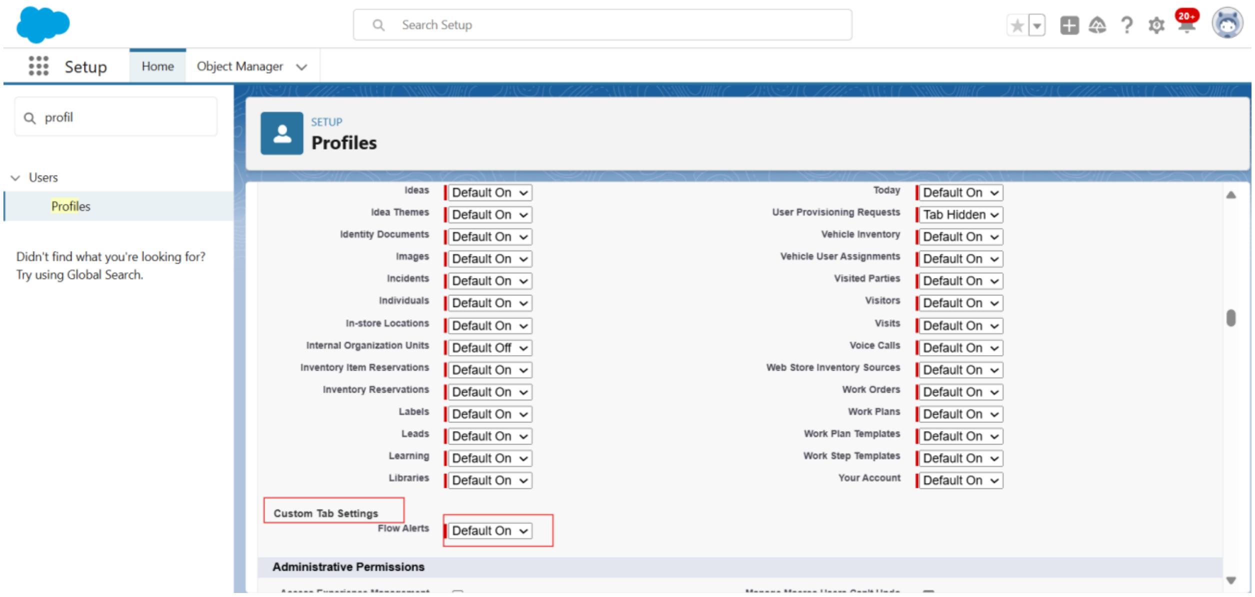
2. Select the profile: Find and click on the name of the profile for which you want to grant access to the object. This will open the profile settings page.



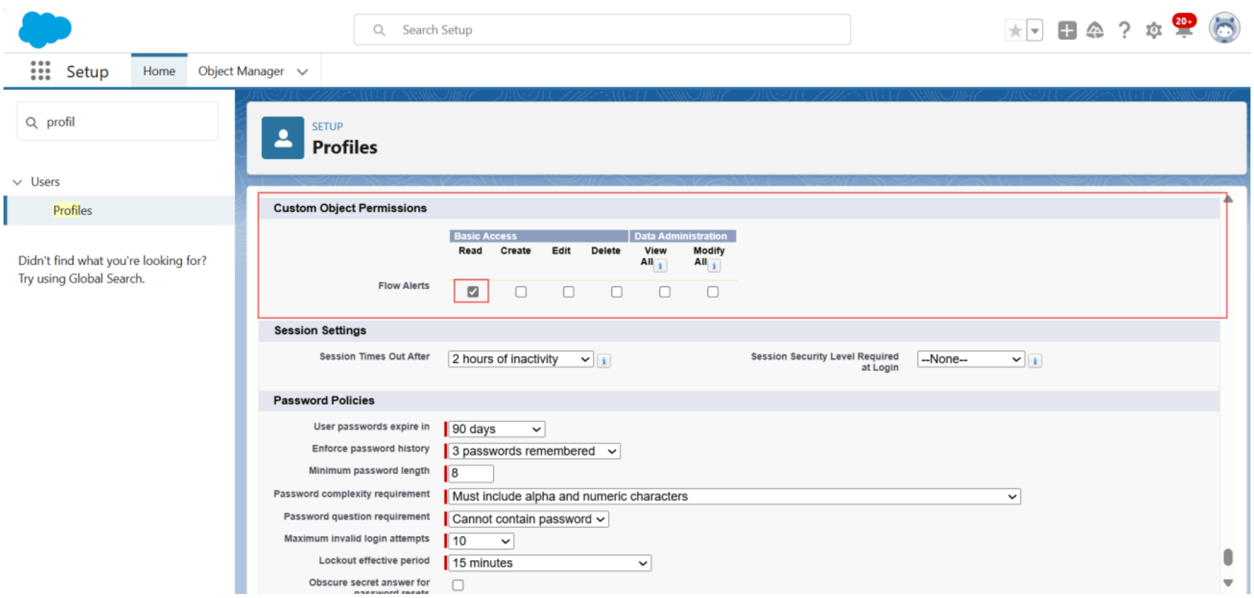
3. Click on profile and then click on **Edit**



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.

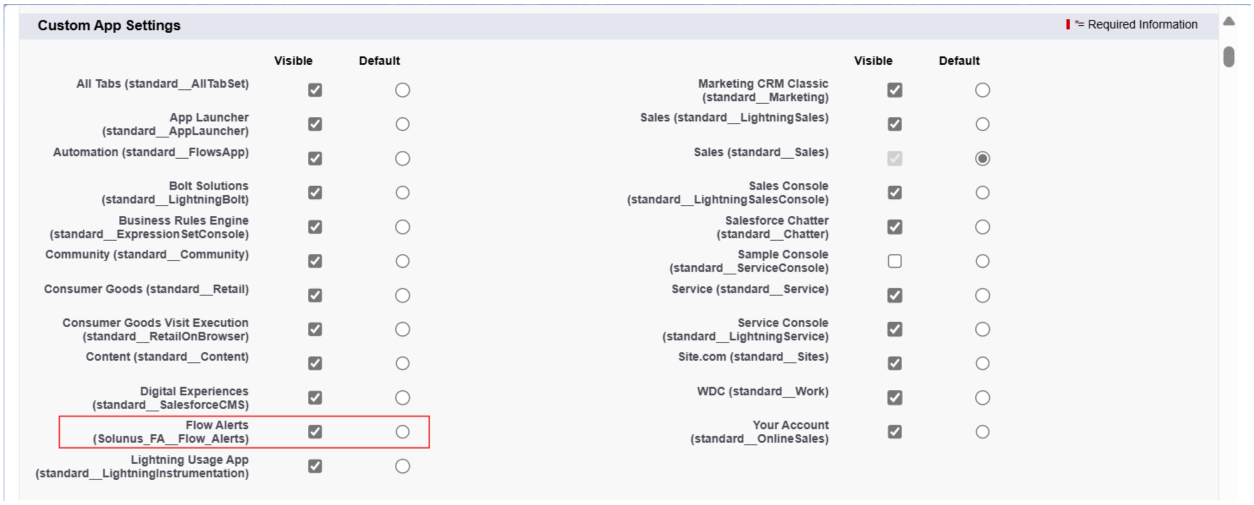


5. Next, Set Object Permissions: Go to “**Custom Object Settings**”→ check the checkbox for Read access

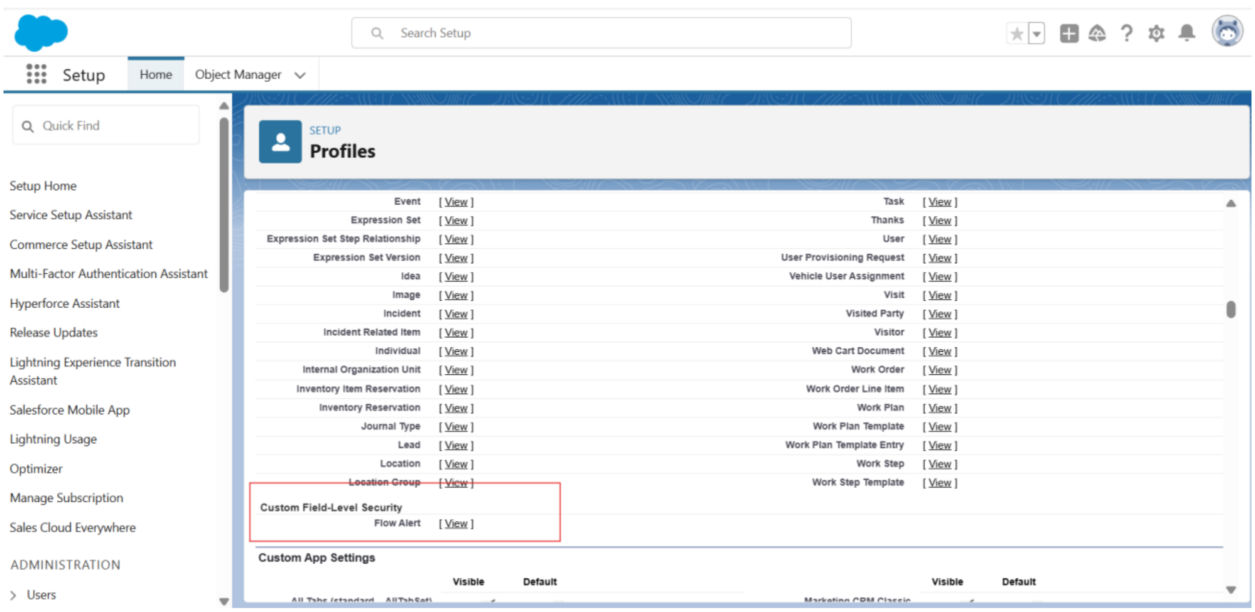


6. **Set App Permission**: Go to “**Custom App Settings**” → Select Flow Alerts object and then check “Visible” checkbox.

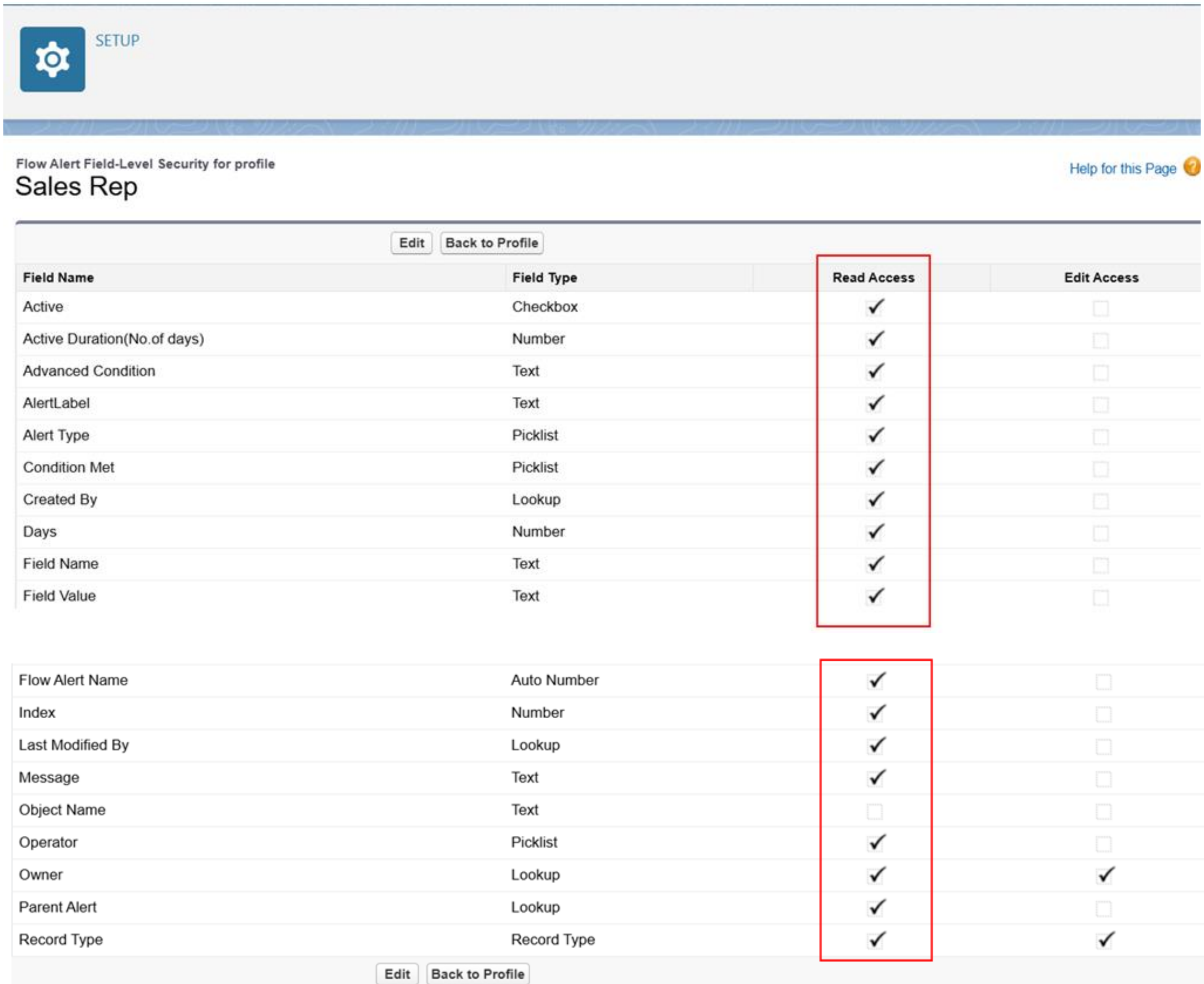
   Next, Click on **Save**



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

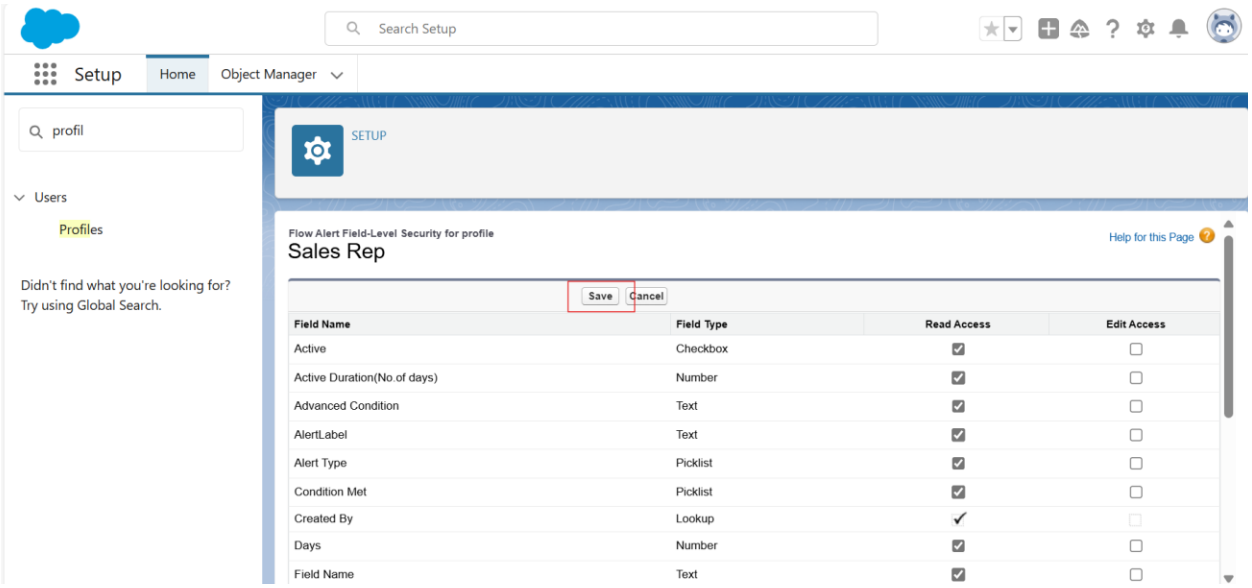


8. Now, select the checkbox under "Read Access" for all the fields.



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	✓	✓

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.

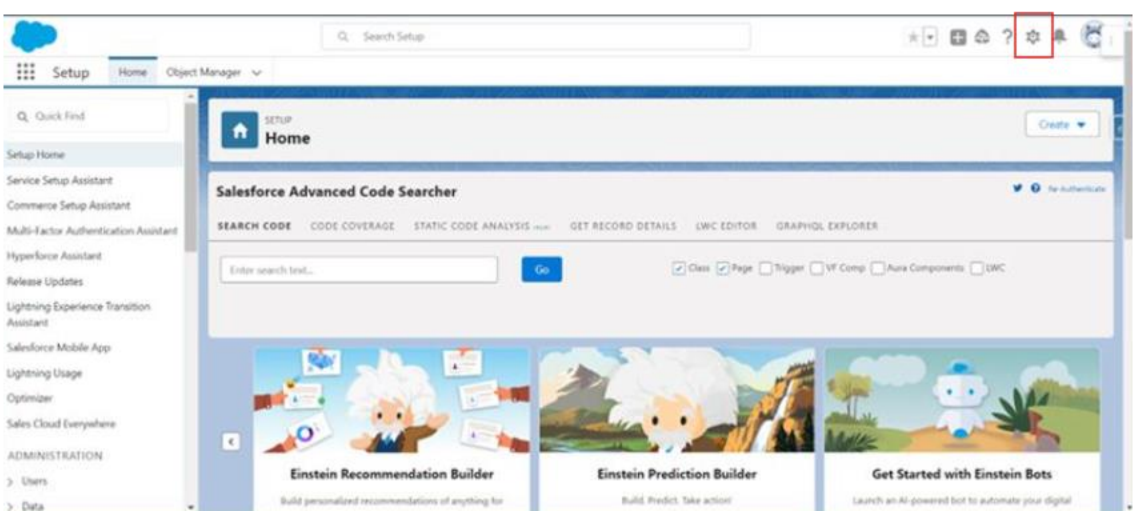
ADDING LWC COMPONENT TO LIGHTNING PAGE

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:

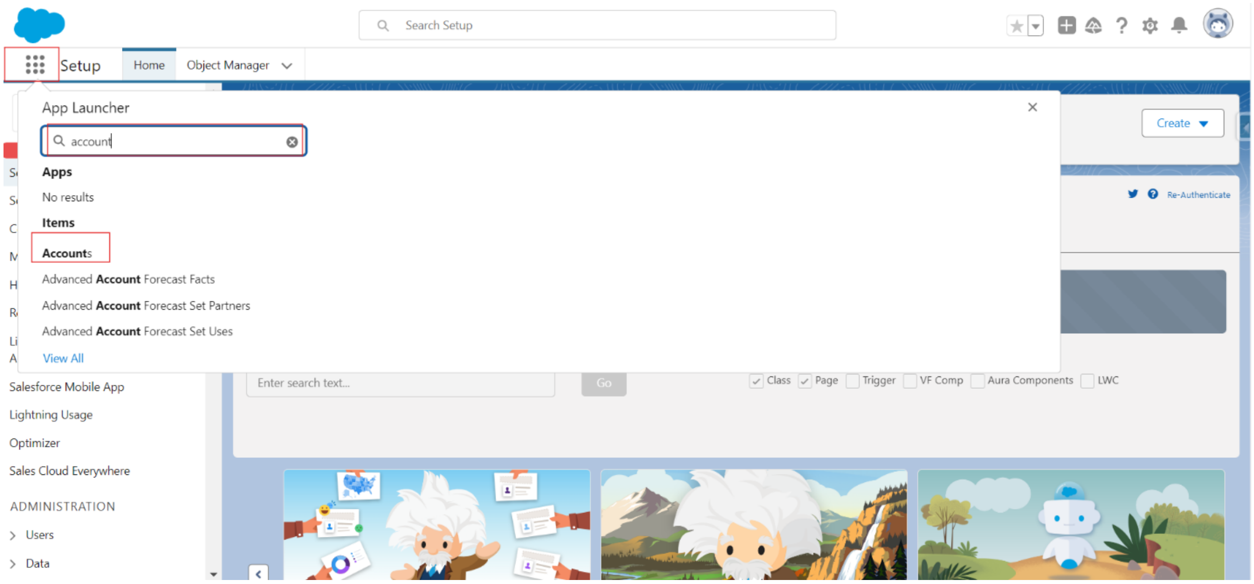
Steps to add the Lightning Web Component (LWC) to the Lightning record page. Simply drag and drop the component(**flowAlertComponent)** onto the respective objects to display the alerts.

1. Navigate to the Salesforce Setup page

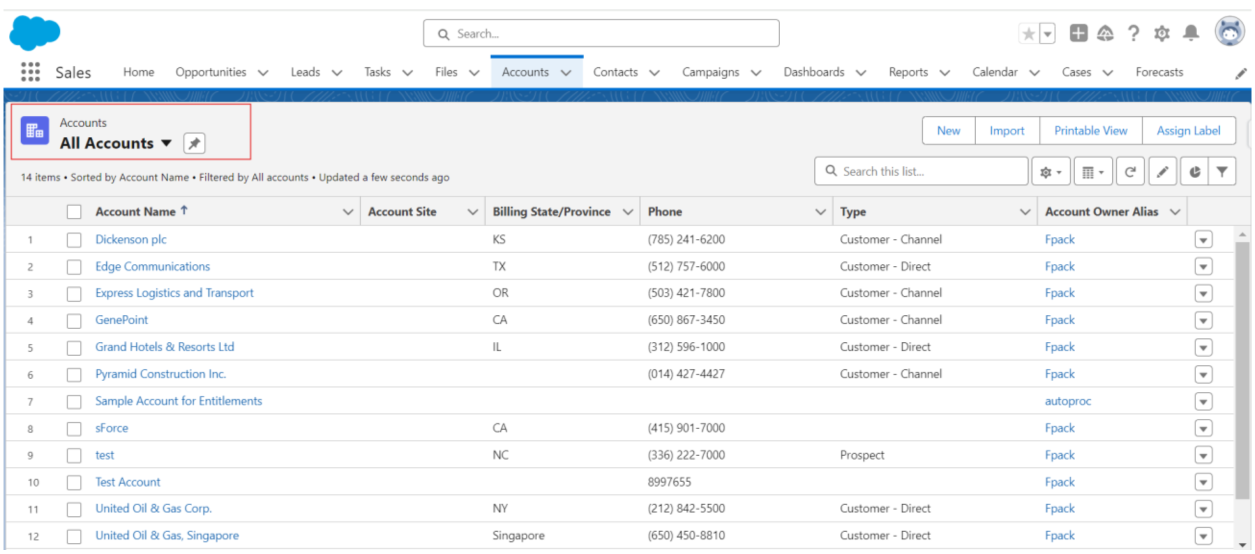


Note: To add an LWC component to any Salesforce object, such as an Account, follow the process outlined in the guide.

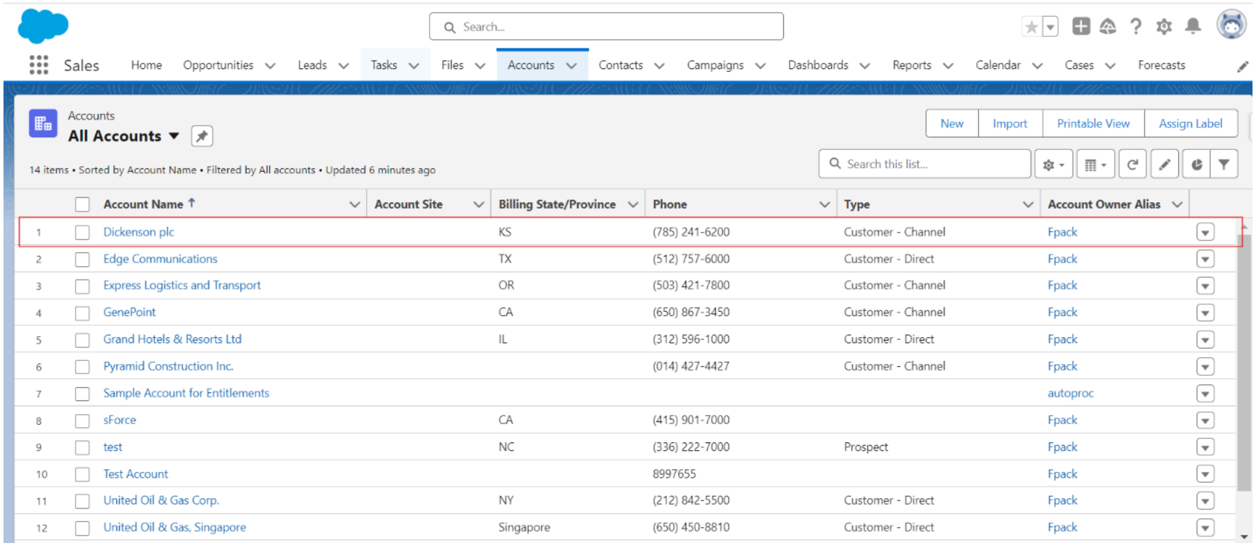
2. Go to App launcher >> Search for Account >> Click on Account



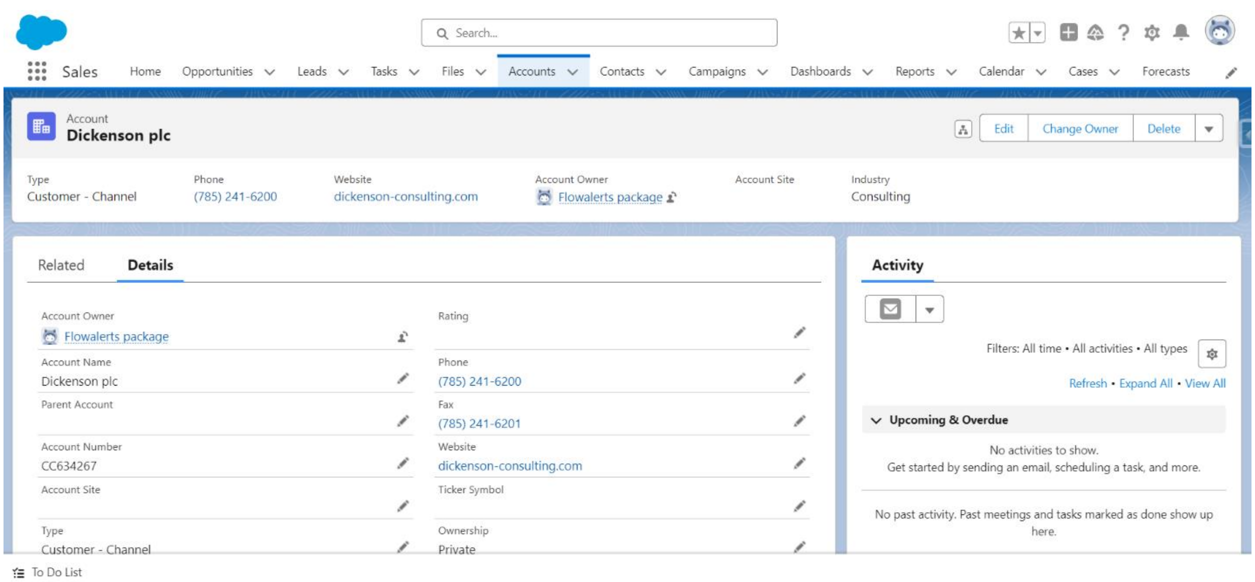
3. **Navigate to Object**: Go to the specific object where you want to edit records (e.g., Accounts, Contacts, Opportunities).



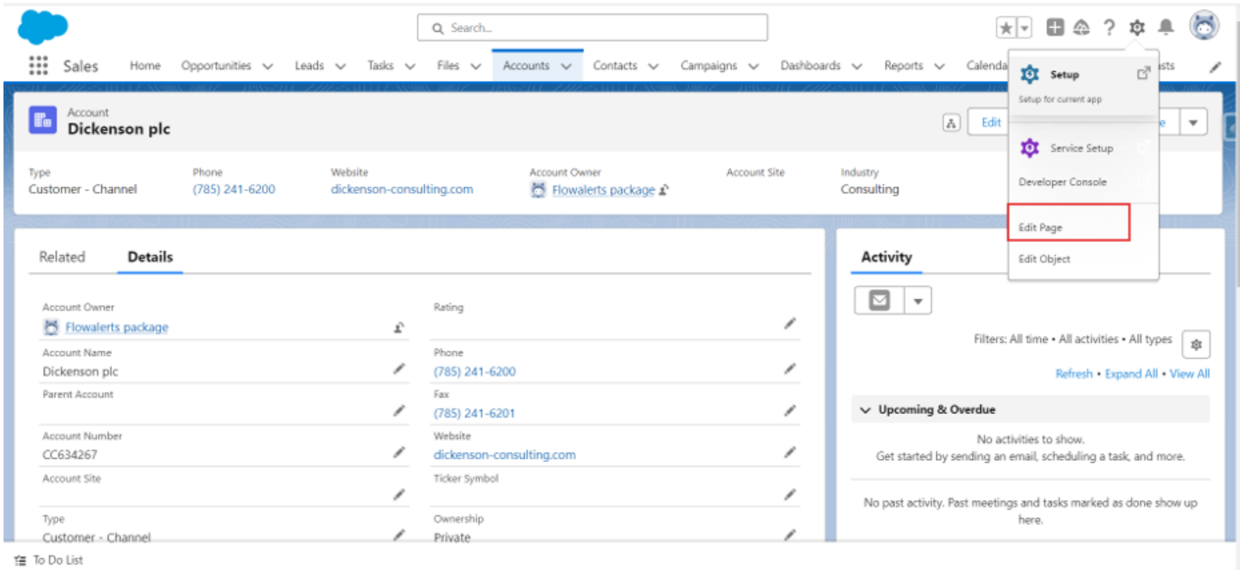
4. **Locate Record**: Find the record you wish to edit within the object list.



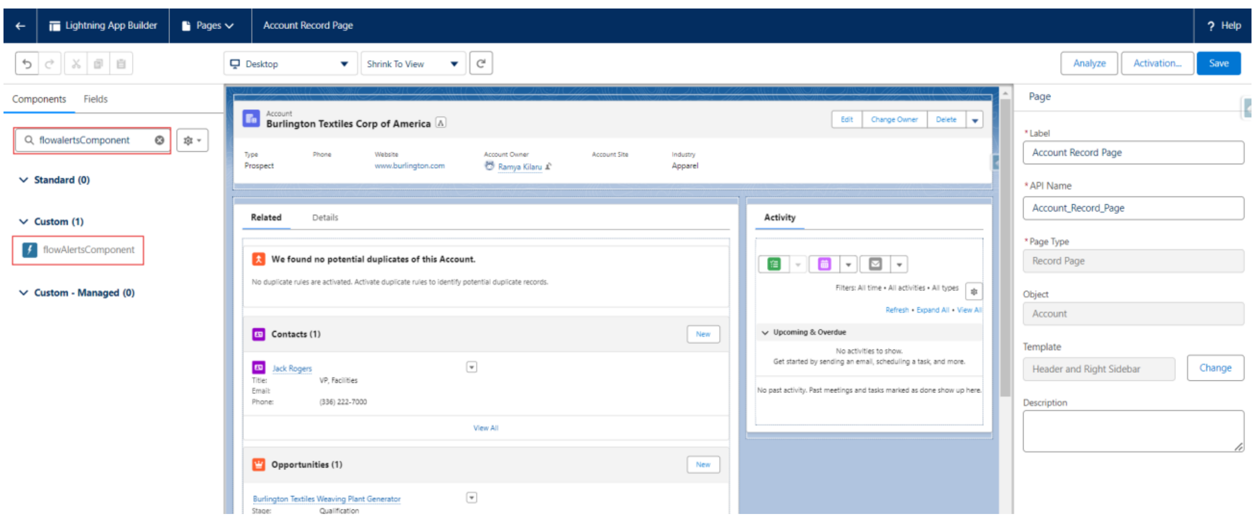
5. **Open Record**: Click on the record's name to open its detail page.



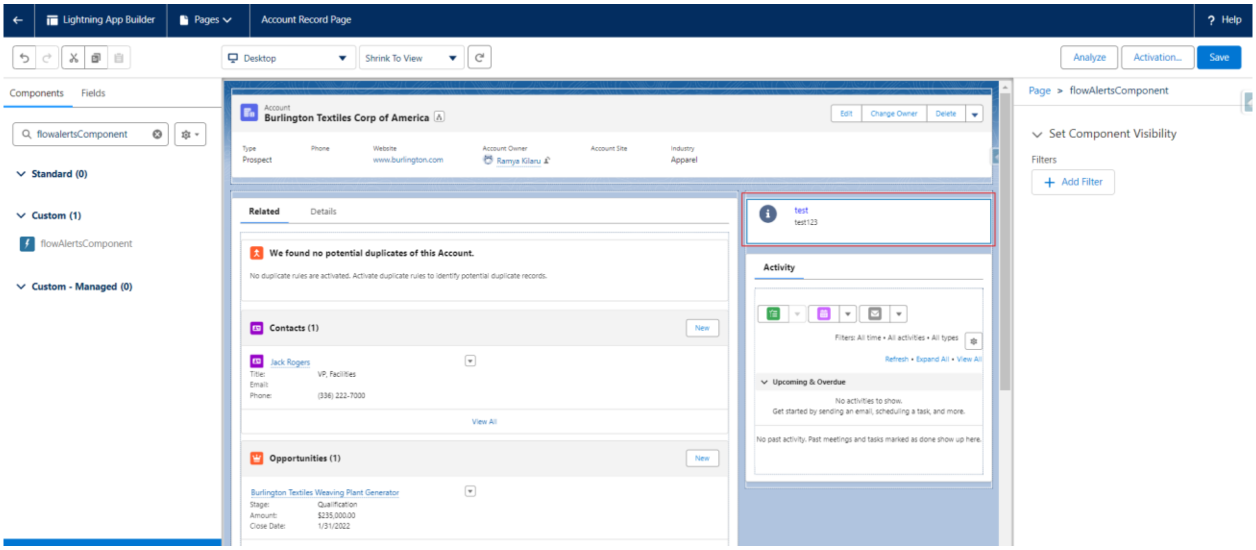
6. **Access Edit Page**: Look for and click the "Edit" button or link typically located near the top of the record detail page. Click on edit page



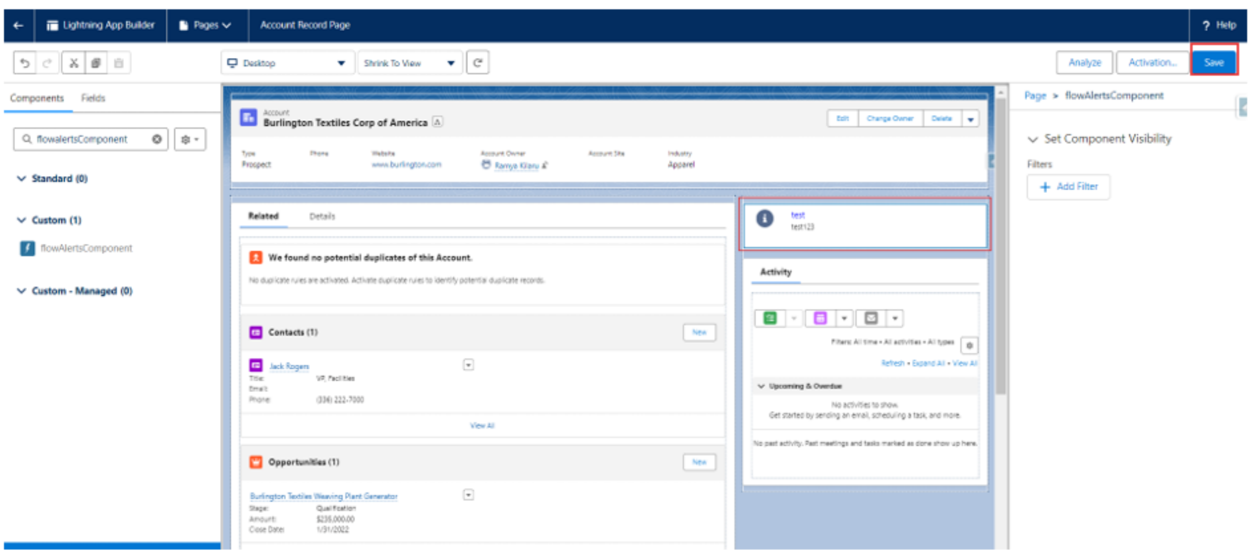
7. **Make Changes**:. Search for “**flowAlertComponent** “



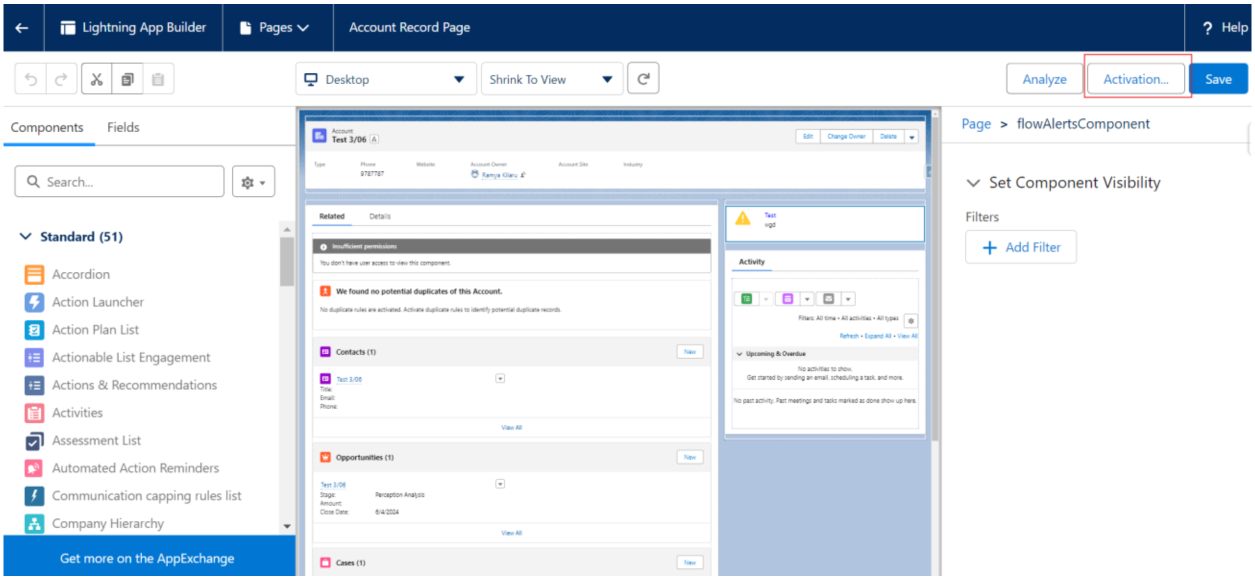
8. Drag the LWC component (*flowAlertComponent*) onto the desired location on the Lightning record page.



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.

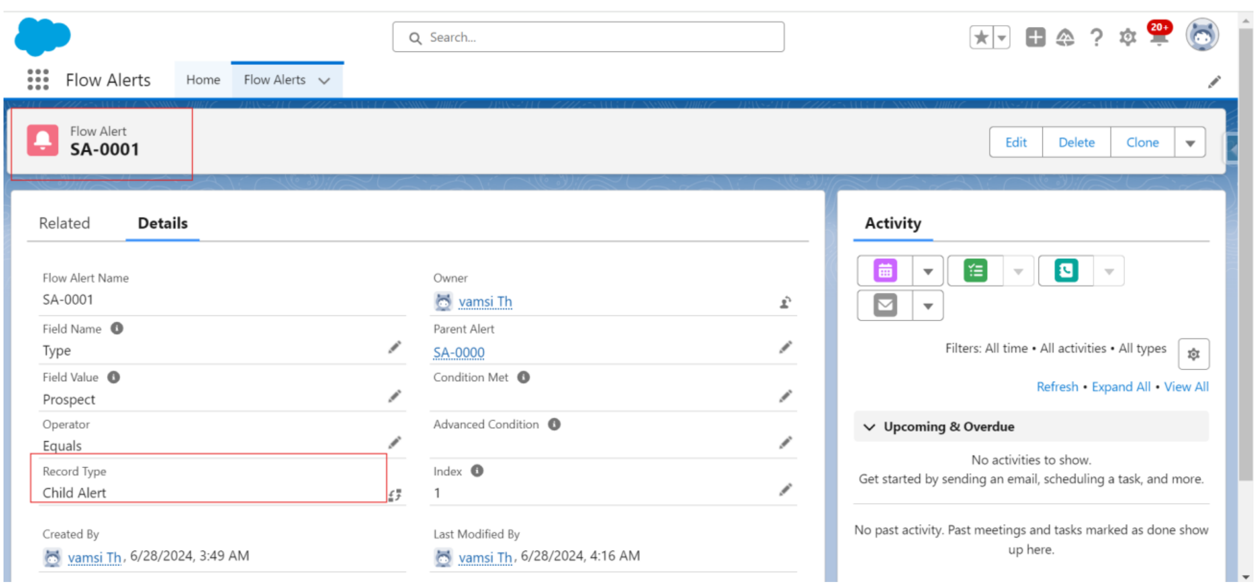


By following the above steps, it will allow you to seamlessly add an LWC component to a Lightning record page in Salesforce. After successfully adding and activating the flow we can see alerts on the record detail page

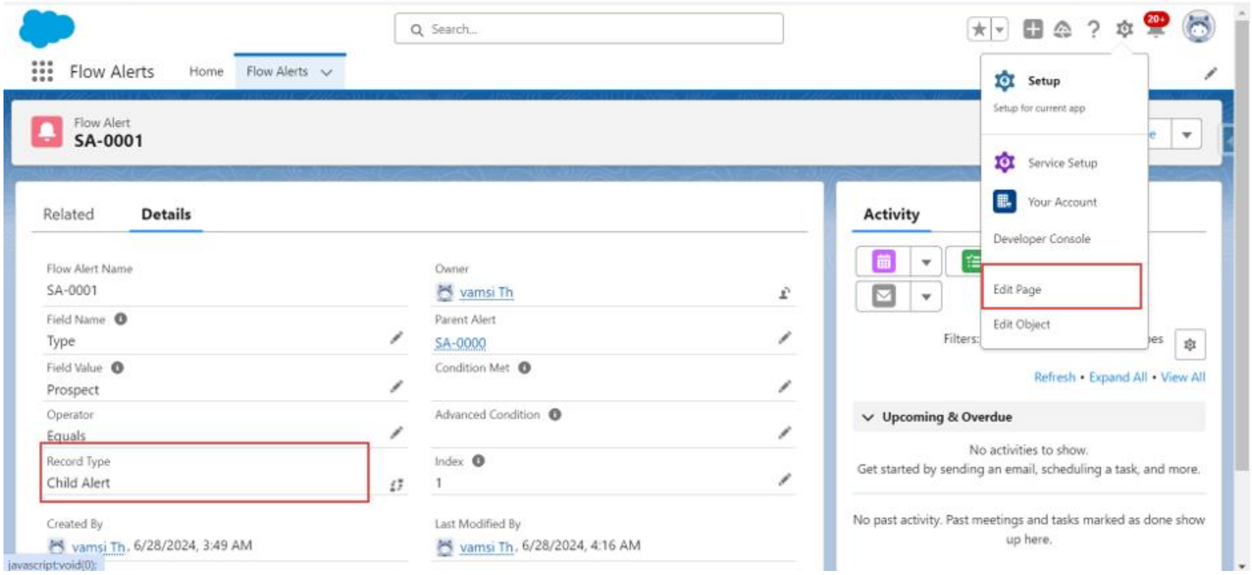
ASSIGNING LIGHTNING RECORD PAGES TO THE RESPECTIVE LAYOUTS

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

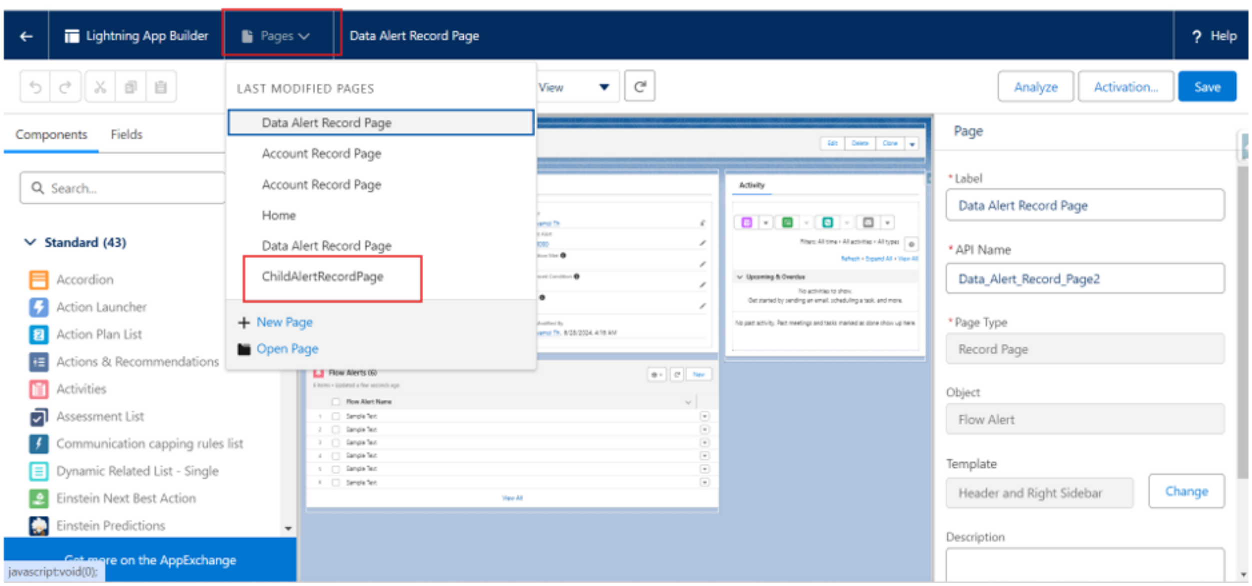
1.Go to a flow alert object with record type as child alert



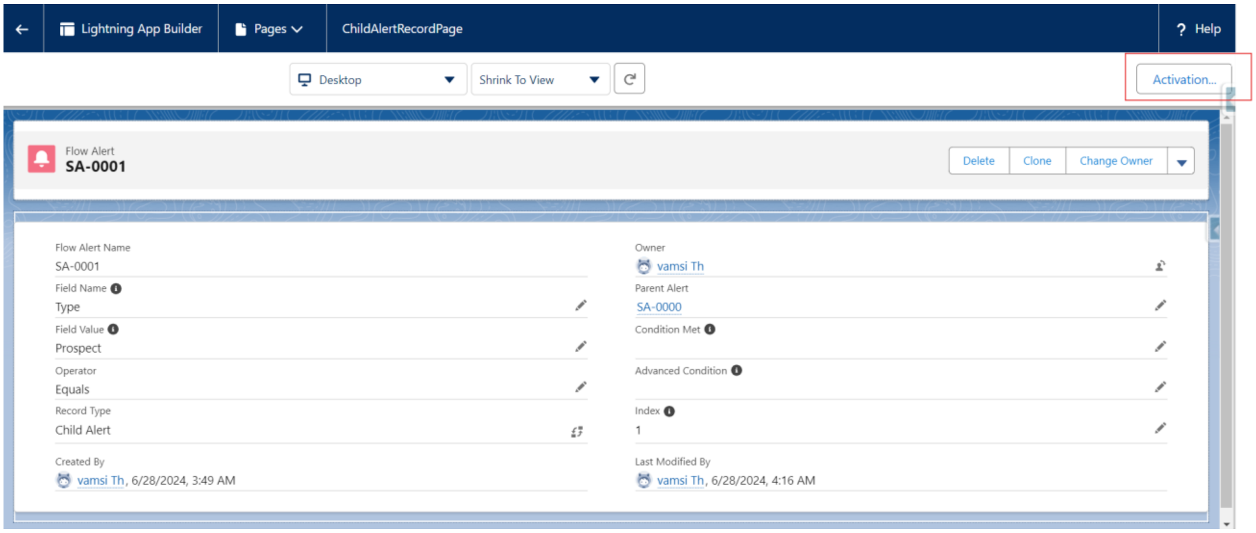
2.Go to Edit page



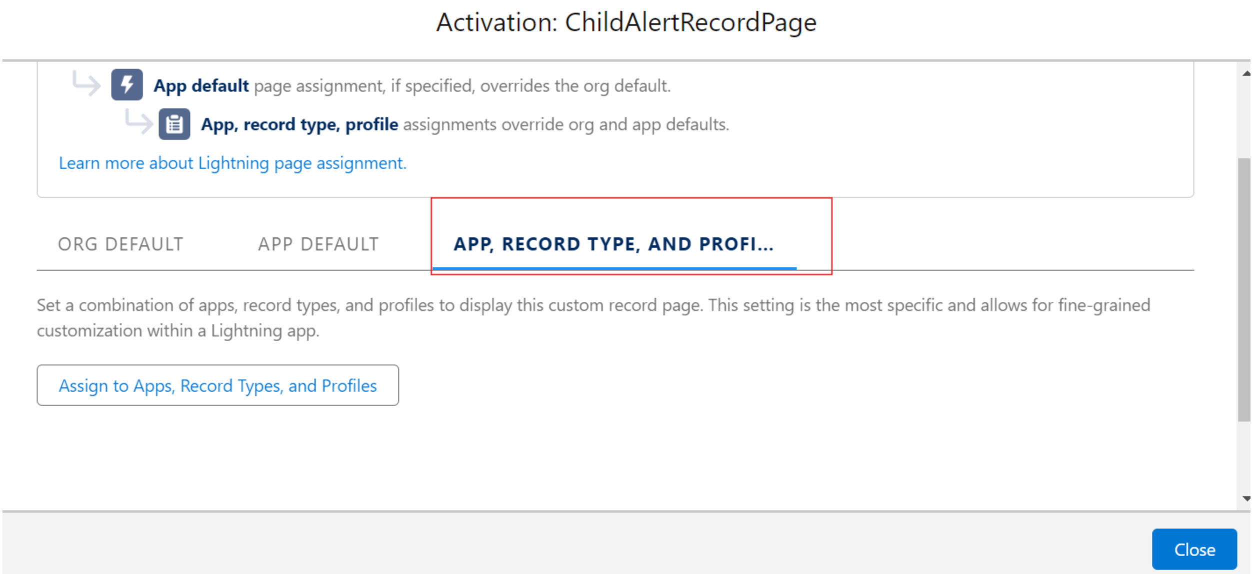
3.Select Edit page→Click pages dropdown→Then select ChildAlertRecordPage



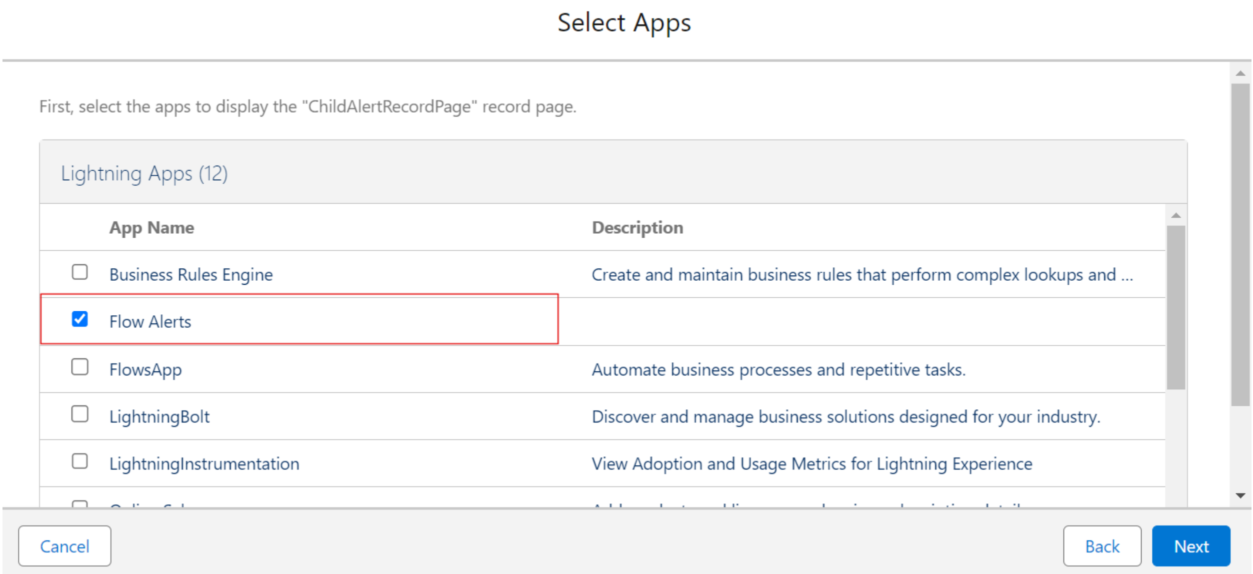
4.Click on Activation



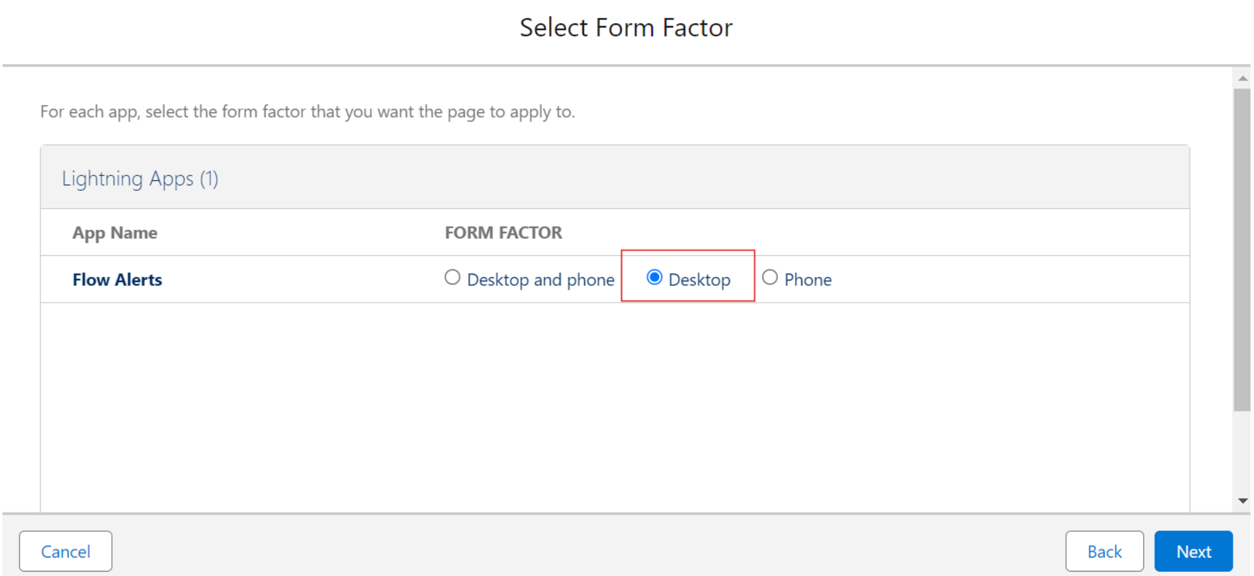
5.Select App, Record Type and profiles



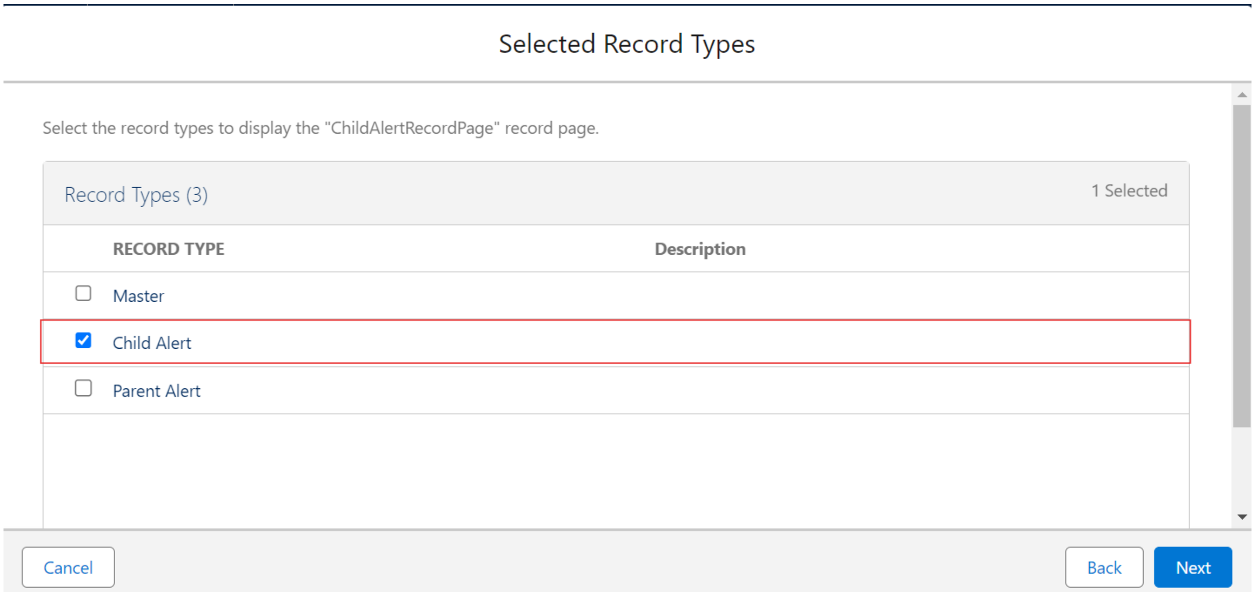
6.Select “Flow Alerts” checkbox and click on “Next” button



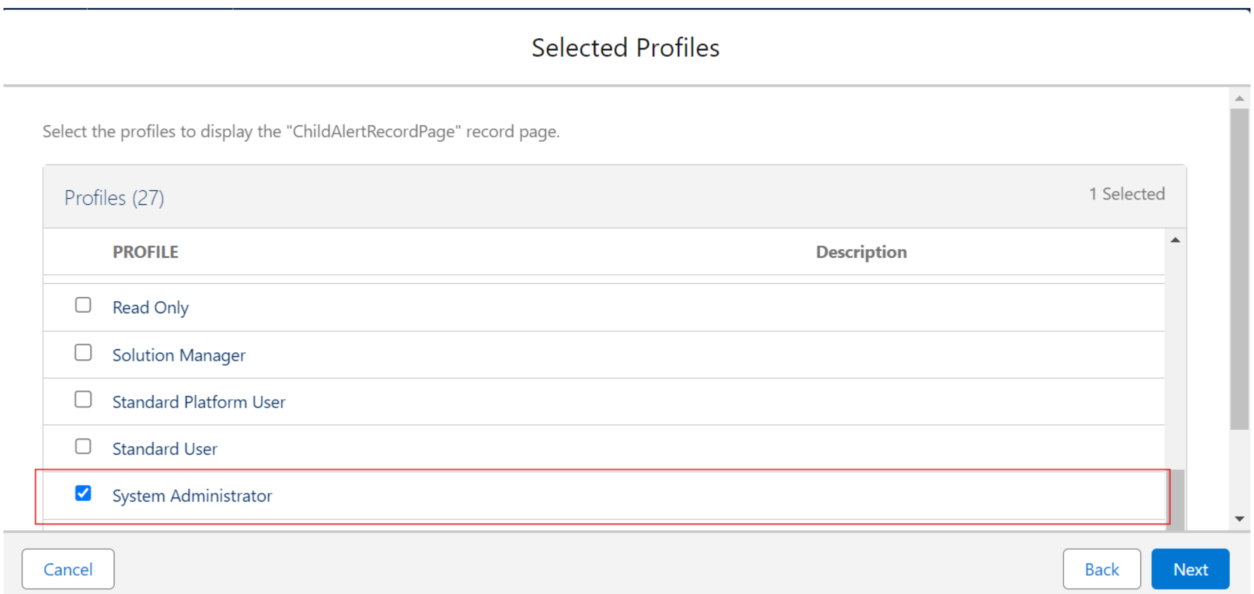
7. Select **Desktop** and click on **Next**



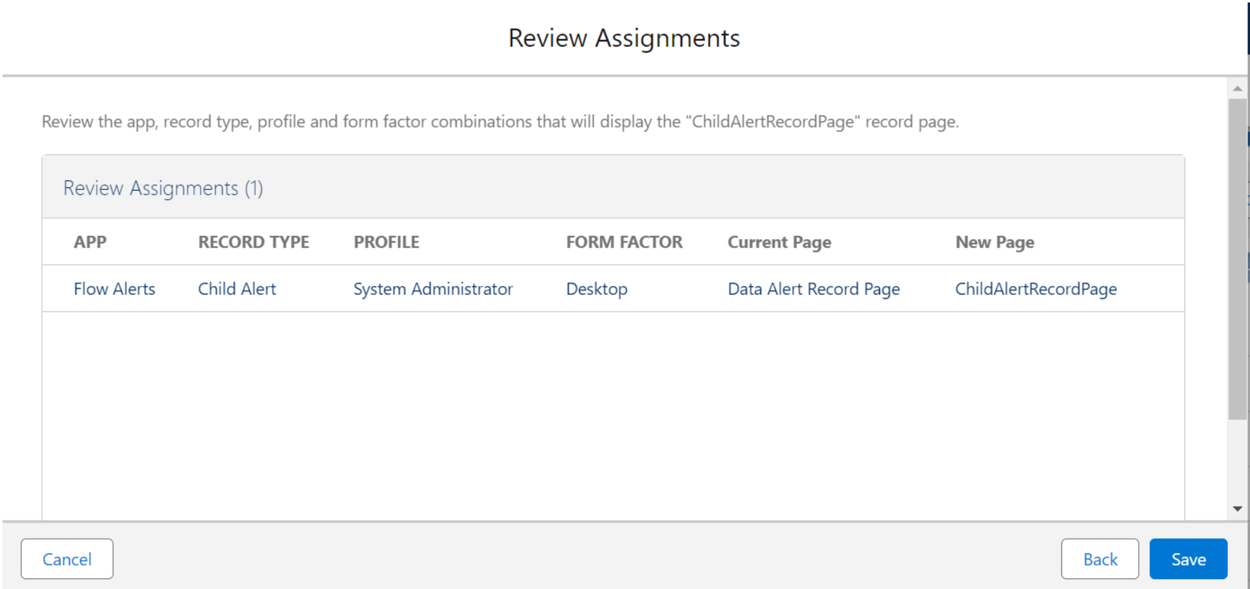
8. Now, Select the "Child Alert" checkbox. Click Next



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



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



*******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.