Ambea

USER MANUAL

By Astrea IT Services

Ambea

Ambea is a cloning app built using flow template that clones Account records with its related lists – Contacts & Opportunity records. User can clone and customize the underlying flow template to meet their business requirements and that too WITHOUT having to write a single line of code! Isn't it amazing? It is, we know.

All you need to do is just add the quick action 'Astrea Clone' on Account page layout and it's ready to do the job. Click 'Astrea Clone' and it will launch the flow. User will be presented with a screen that allows them to enter the number of clones they want to create. Moving ahead shows up a screen that allows users to enter the name of the new records. After successfully entering the record name, the following the subsequent steps it creates the number of clones of Account record with related Contact and Opportunity list. This app allows users to create up to 100 clones of a record. It consists of a flow template, aura component bundle and quick action.

Downloading Steps:

You can download the app in two ways:

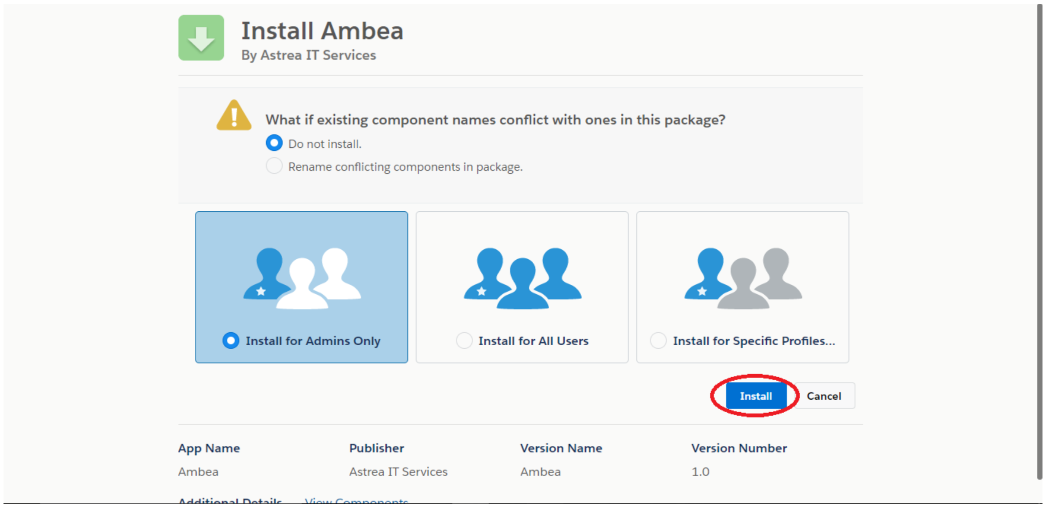
- via AppExchange
- install directly in your org using the package link

Download from AppExchange:

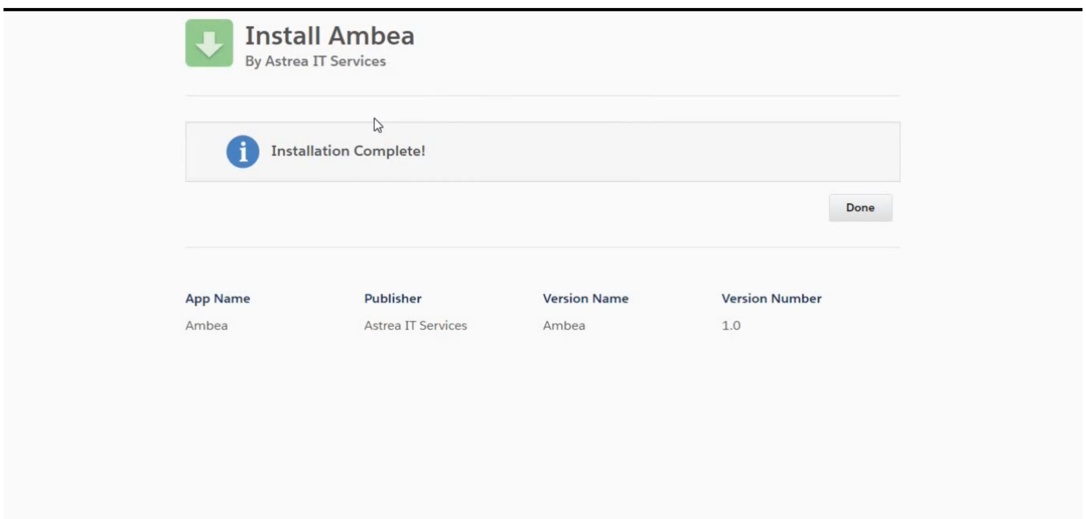
- Click on the AppExchange link in your organization or directly go to https://appexchange.salesforce.com/
- Browse the AppExchange site to find the "Ambea" application.
- Click 'Get It Now' from the application information page.
- You can choose the accessibility of the app for All users or for Only Admin according to your organization's needs.

Install directly using package link:

- Directly go to this link - https://login.salesforce.com/packaging/installPackage.apexp?p0=04t2x000002K9uv
- You will be redirect to this tab:



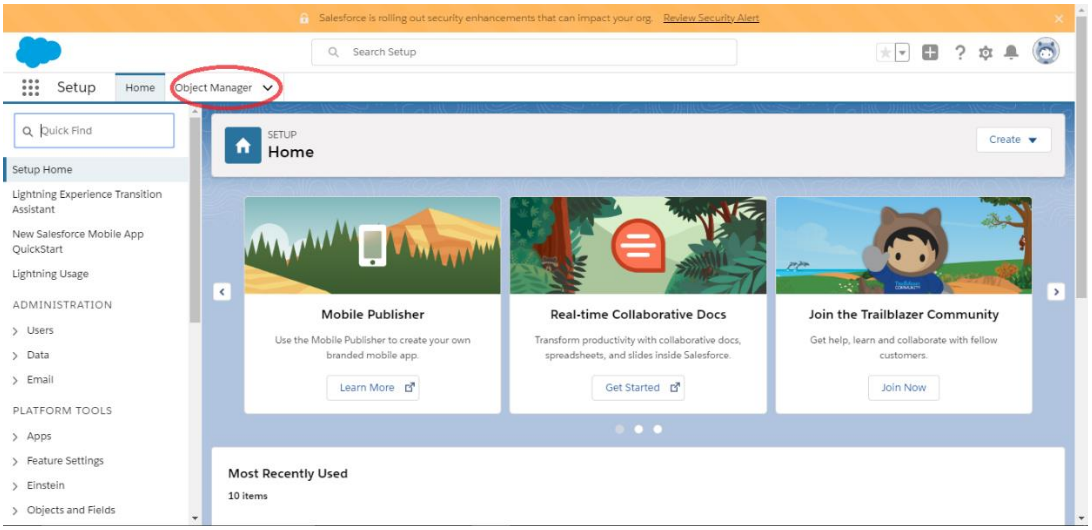
- Click ‘Install’ and you will be redirected to this window:



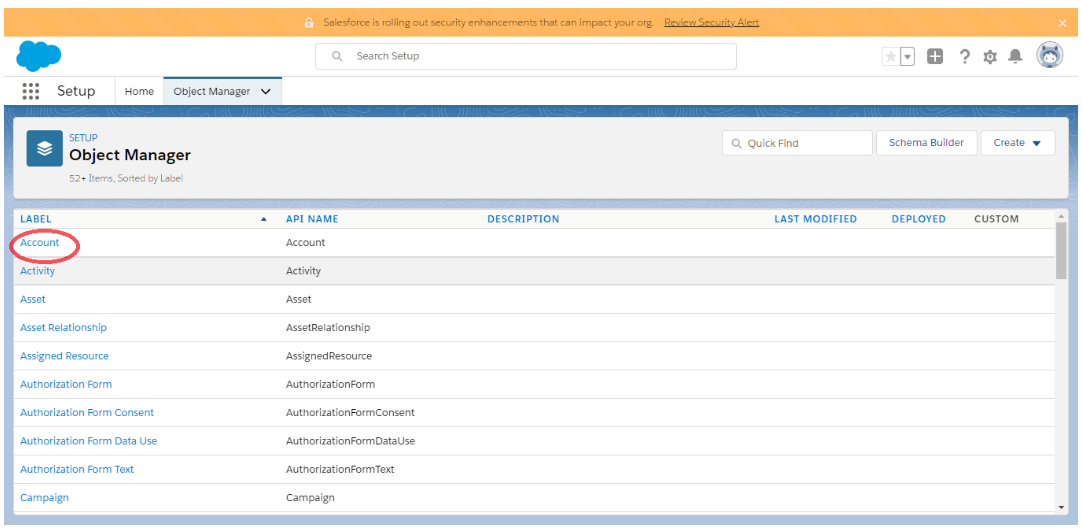
- Click ‘Done’ to finish the installation process.

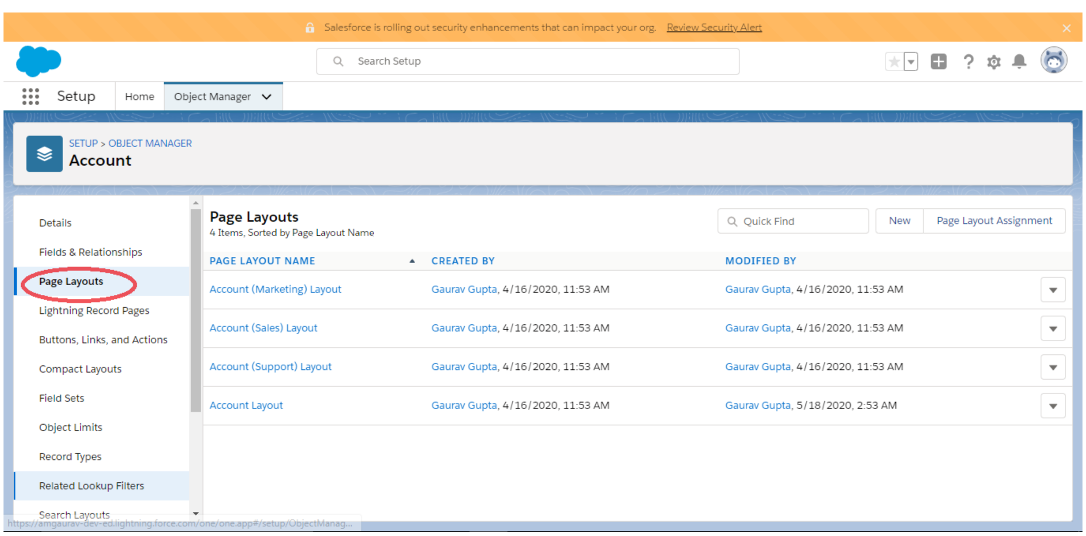
Add the Astrea Clone Quick Action in Account Page Layout:

- Click on the Object Manager on Setup page.

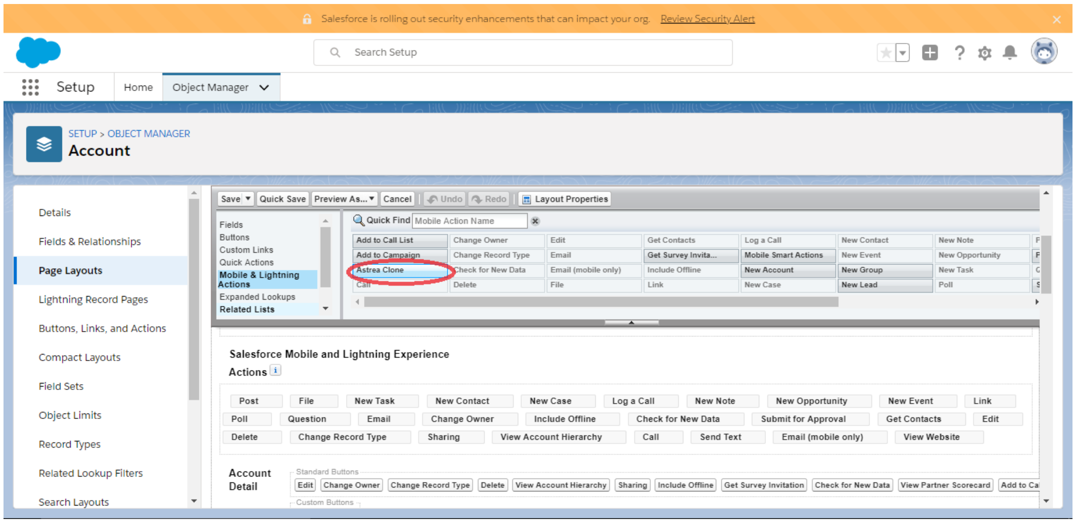


- Select Account and go to the Page Layout.

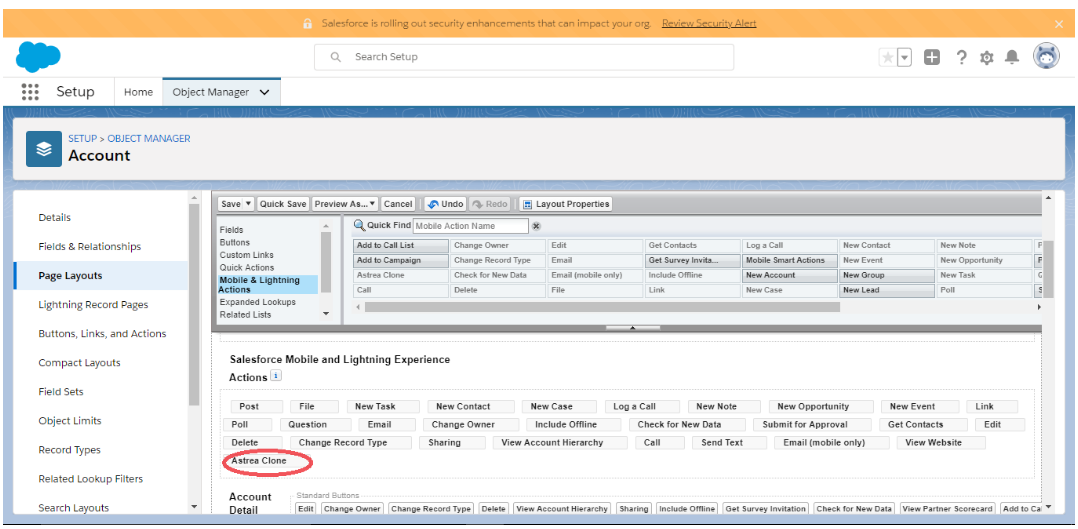




- Click on Account Layout, then select Mobile & Lightning Action.



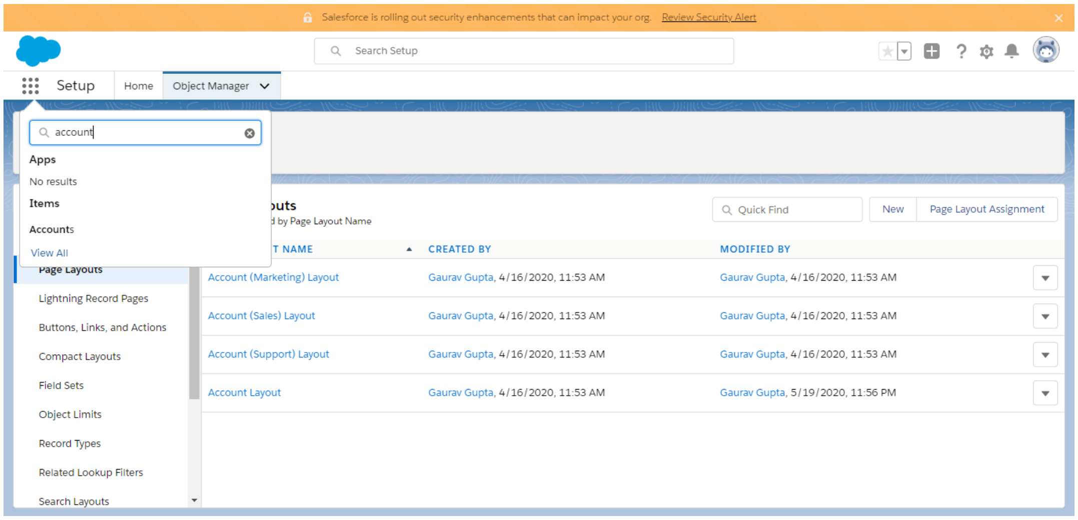
- Drag the **Astrea Clone** action down to the Salesforce Mobile and Lightning Experience Actions section.

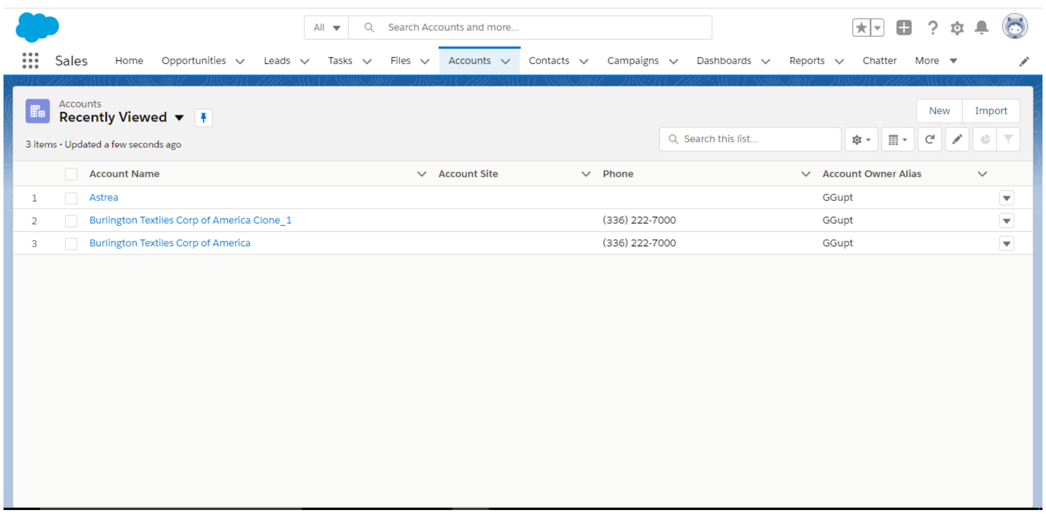


- Click 'Save' to save the layout.

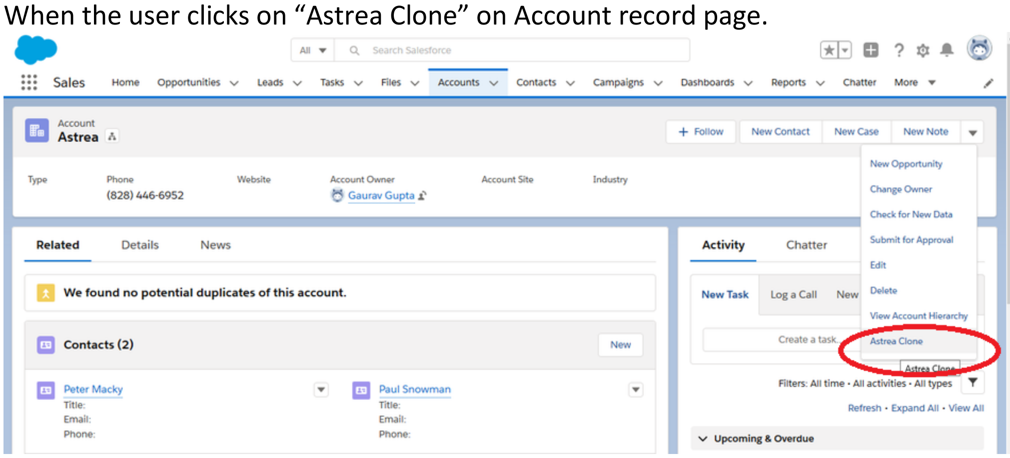
How Ambea Works:

- Type Accounts in App Launcher, then select **Accounts** to go the Account list view. Open an account record.

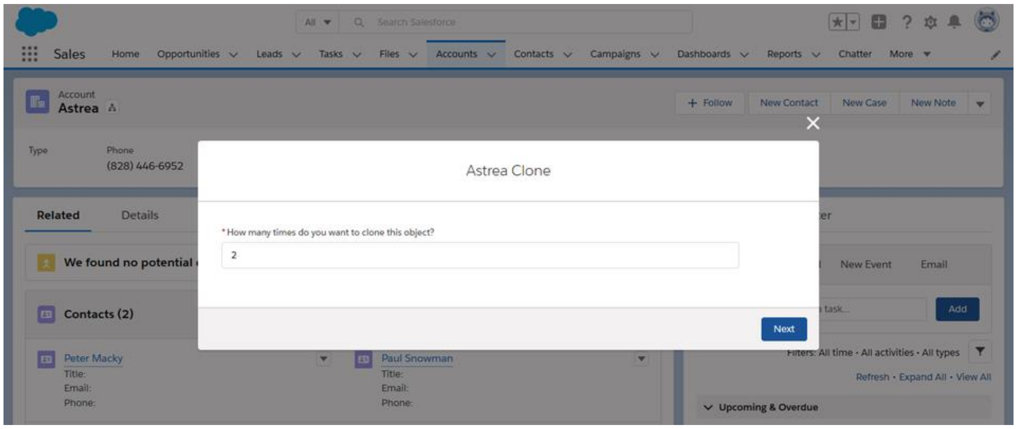




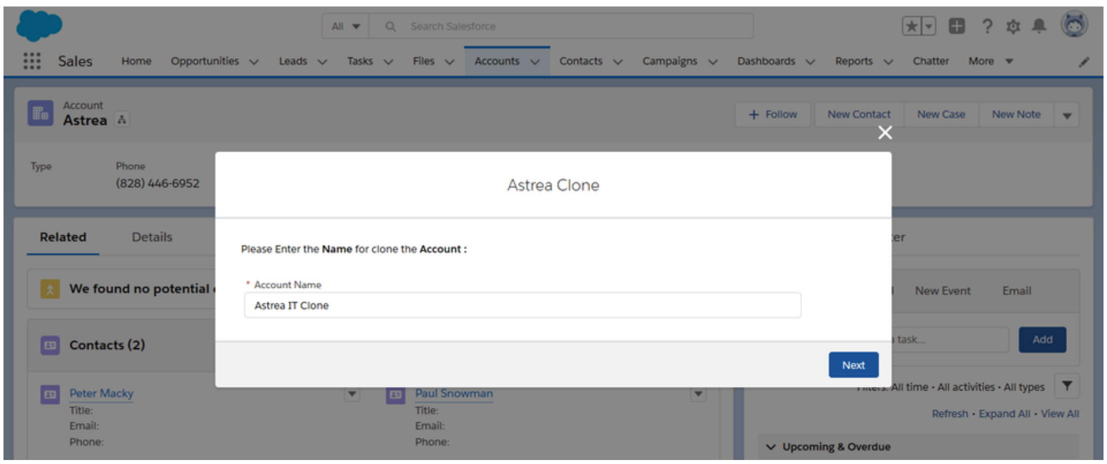
- When the user clicks on “Astrea Clone” on Account record page.



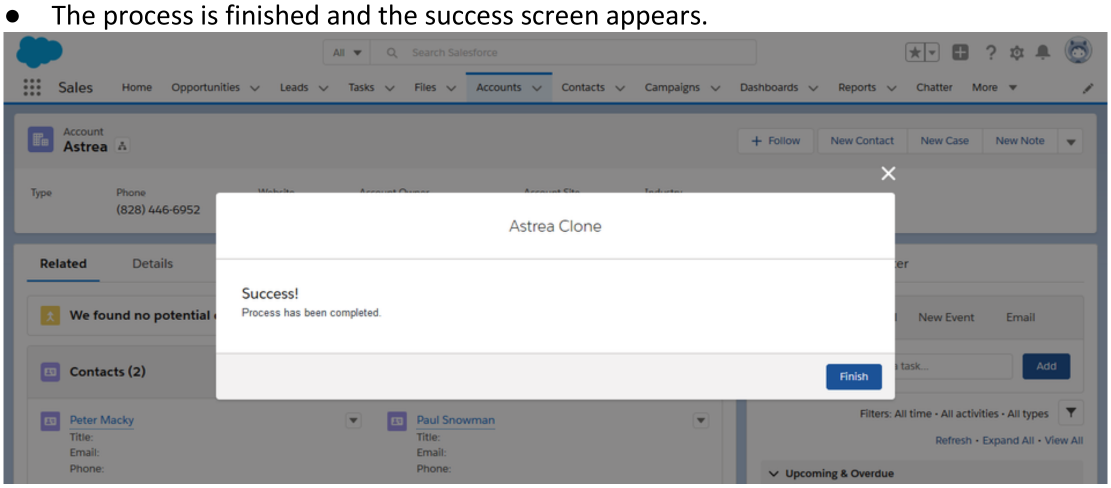
- Flow starts, A screen appears and asked user for enter the number of clones.



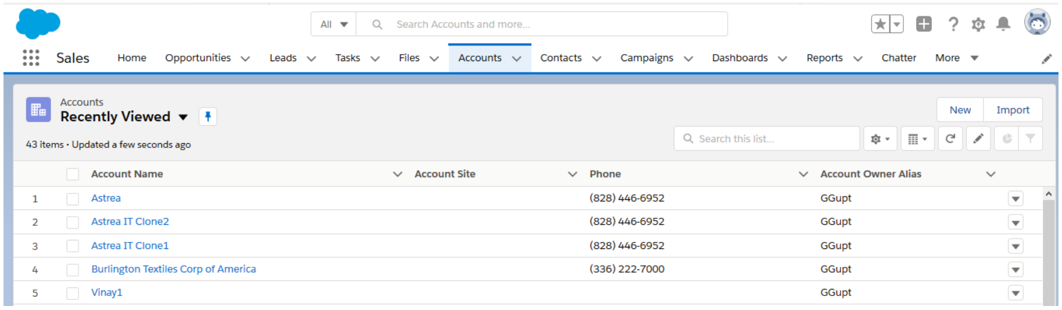
- After click on 'Next', a screen appears with default account name. The user can set provide the new name of their choice.



- The process is finished and the success screen appears.



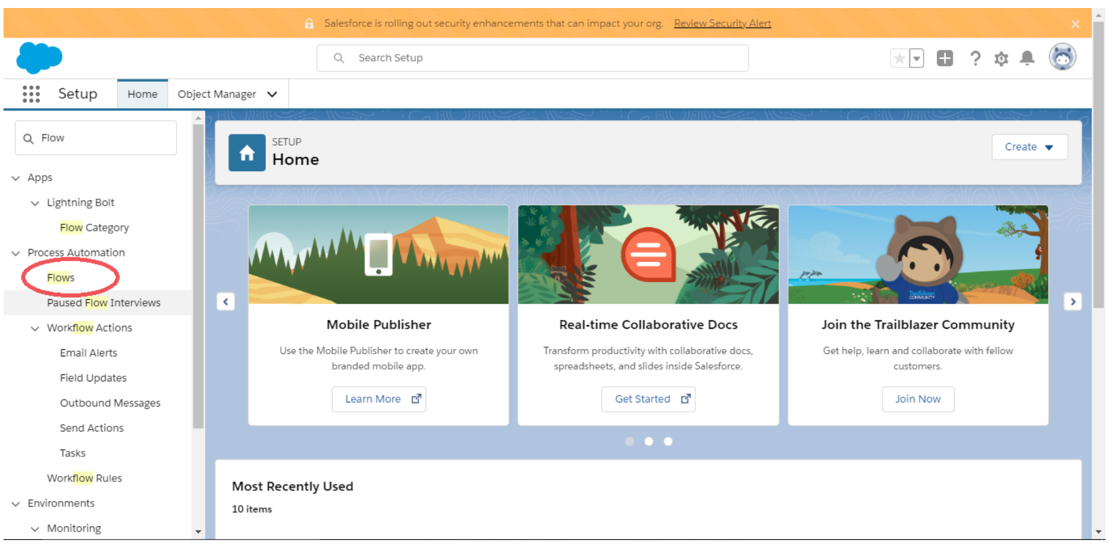
- The following accounts are created with contact and opportunity related list.



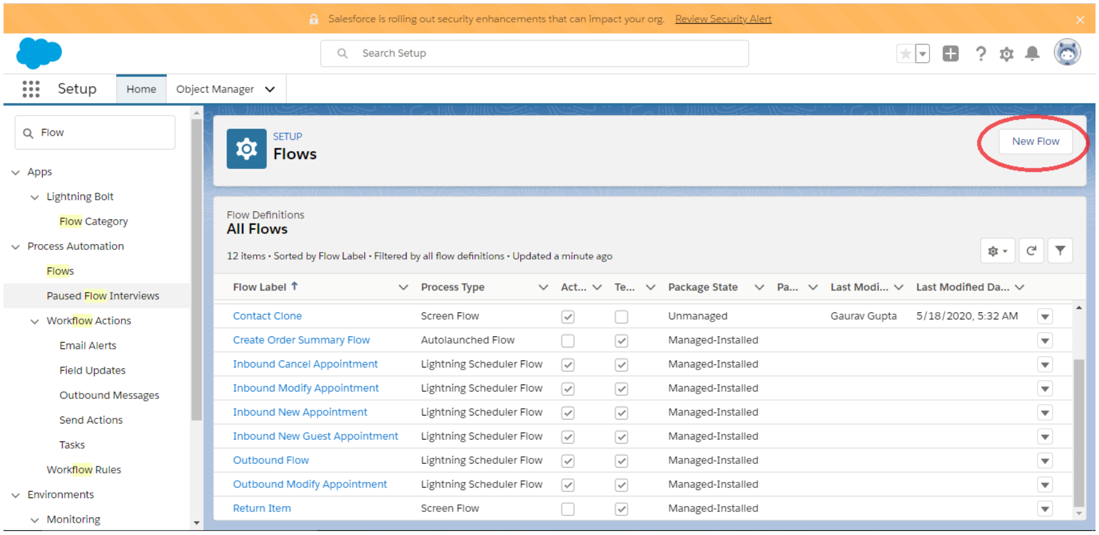
Customize the Ambea to clone other objects:

This section discusses how Ambea can be customized to clone Contact and its related lists - Opportunities and Cases.

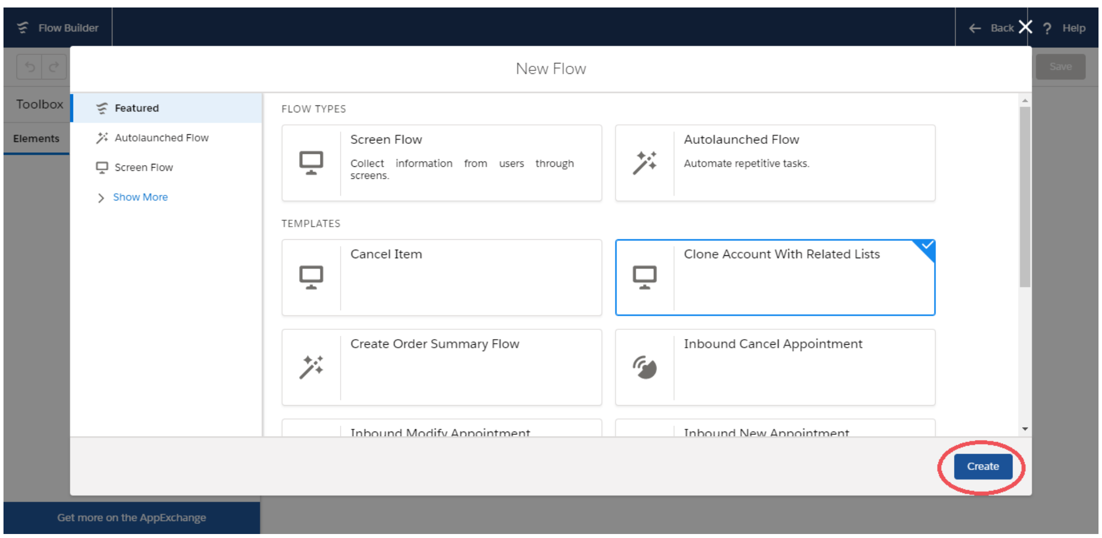
- Type ‘flow’ in Quick find box on Setup page and select ‘Flows’ under Process Automation.



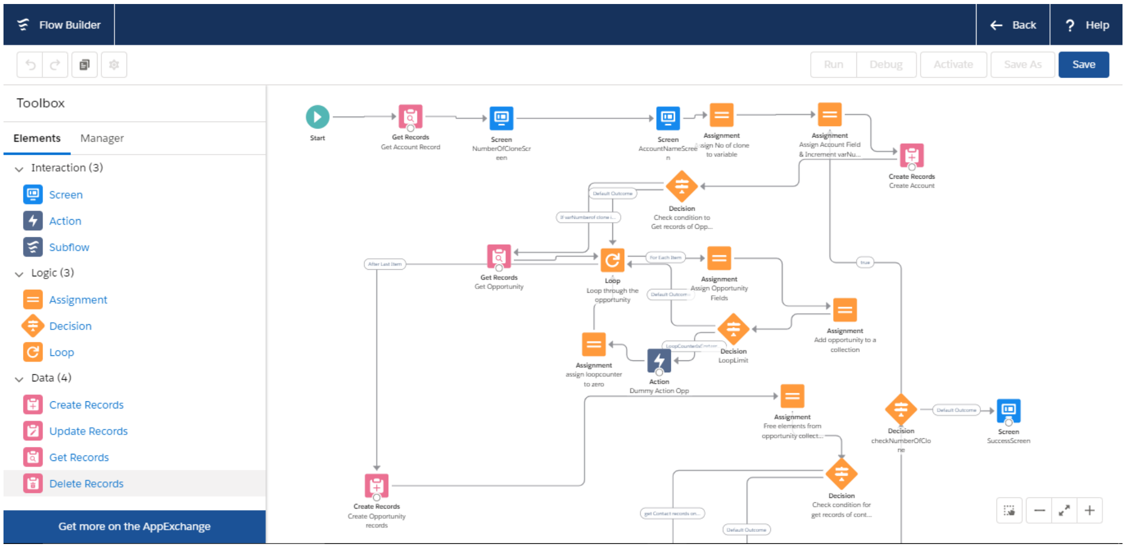
- Now you will be redirected to the Flows then click on New Flow to create new Flow.



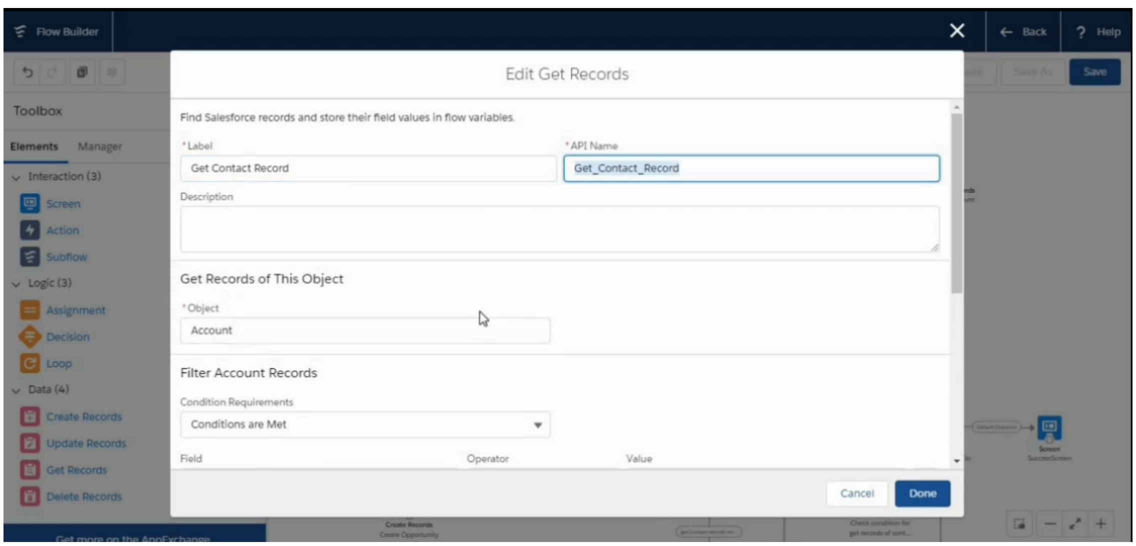
- Then choose ‘Clone Account With Related Lists’ template and click on create.



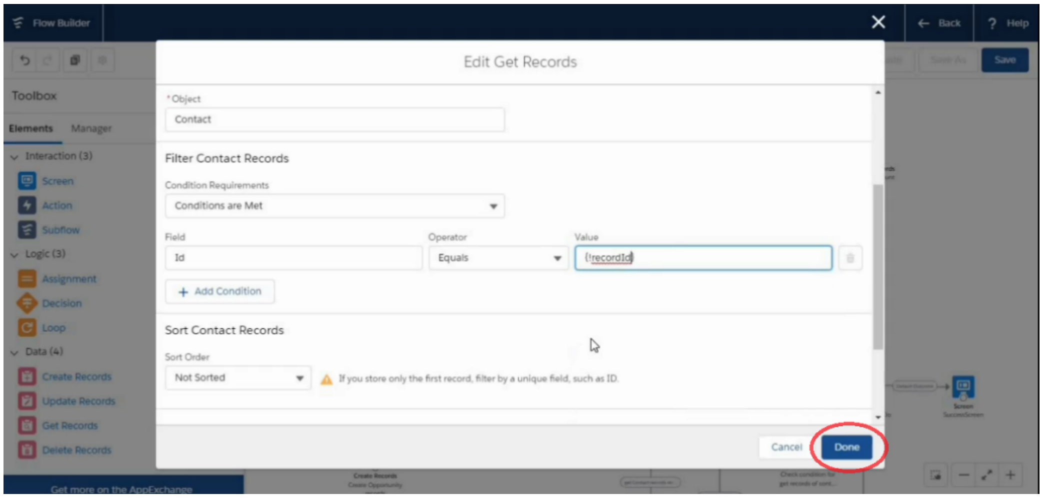
- Now you will see the entire flow ‘Clone Account with Related Lists’ of Ambea App.



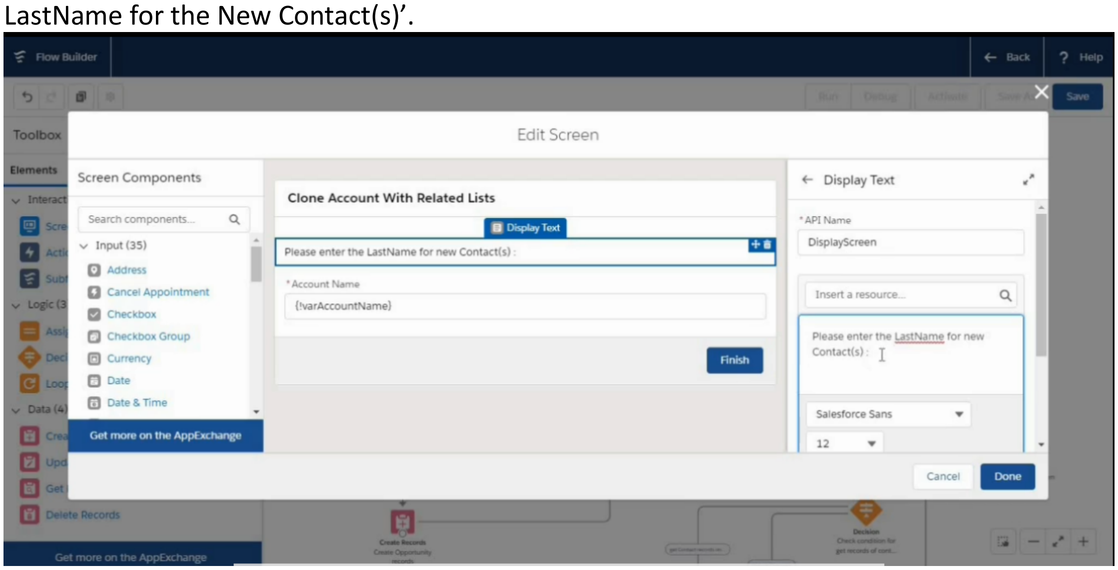
- Click ‘Get Records’- **Get Account Record** then change its label as well as API name to **Get Contact Record.**



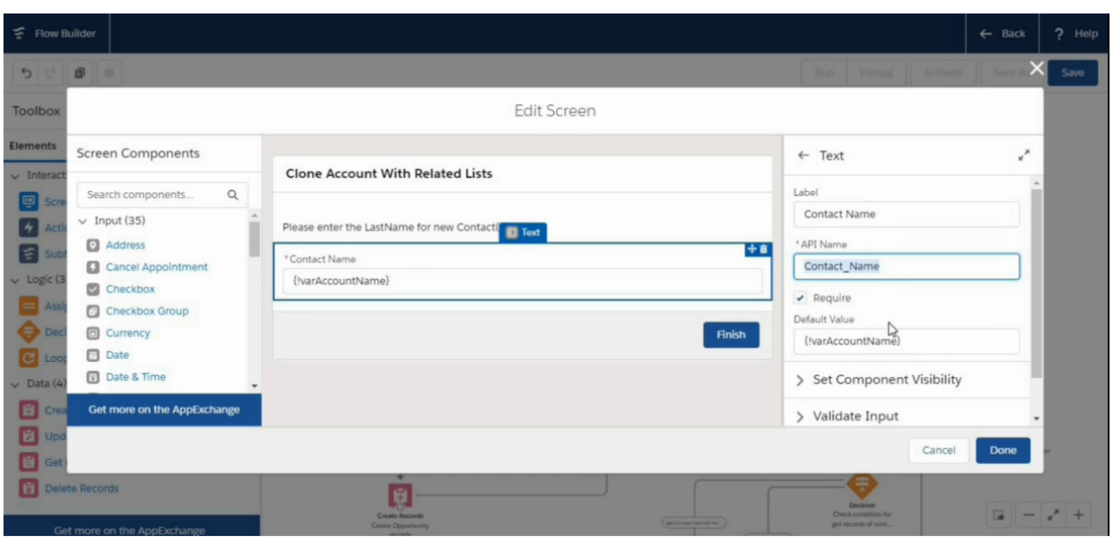
- Change Object Account to Contact and add a condition to fetch record Id Equals {!recordId} and click done.



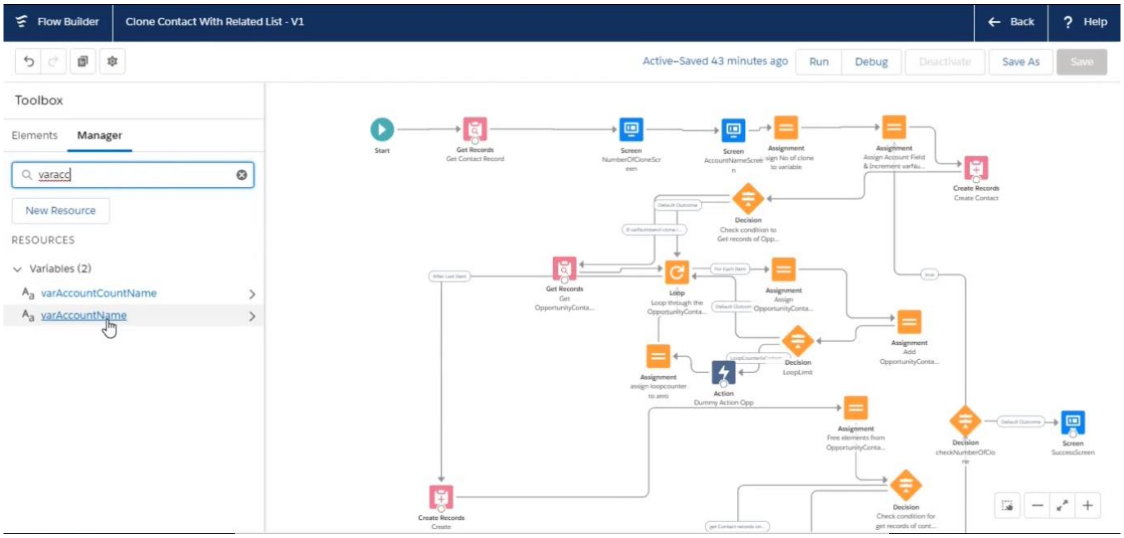
- Now click on Screen – **AccountNameScreen** and change the display text – 'Please Enter the LastName for the New Contact(s)'.

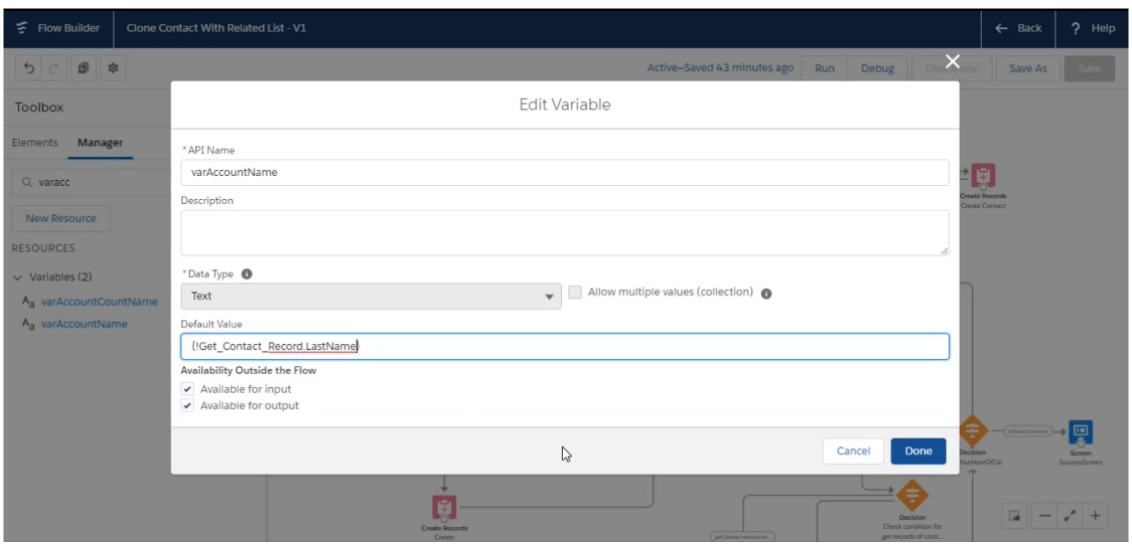


- Click on 'Text' and change its label Contact Name and API name and click on done.

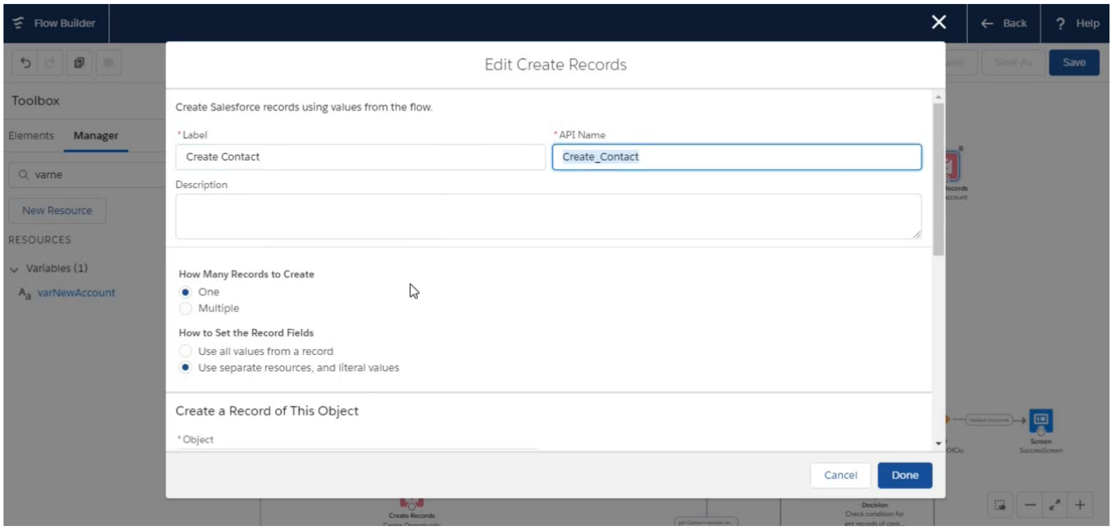


- Click on Manager and search varAccountName and click on the varAccountName and change its default value to {!Get_Contact_Record.LastName}, and press Done.

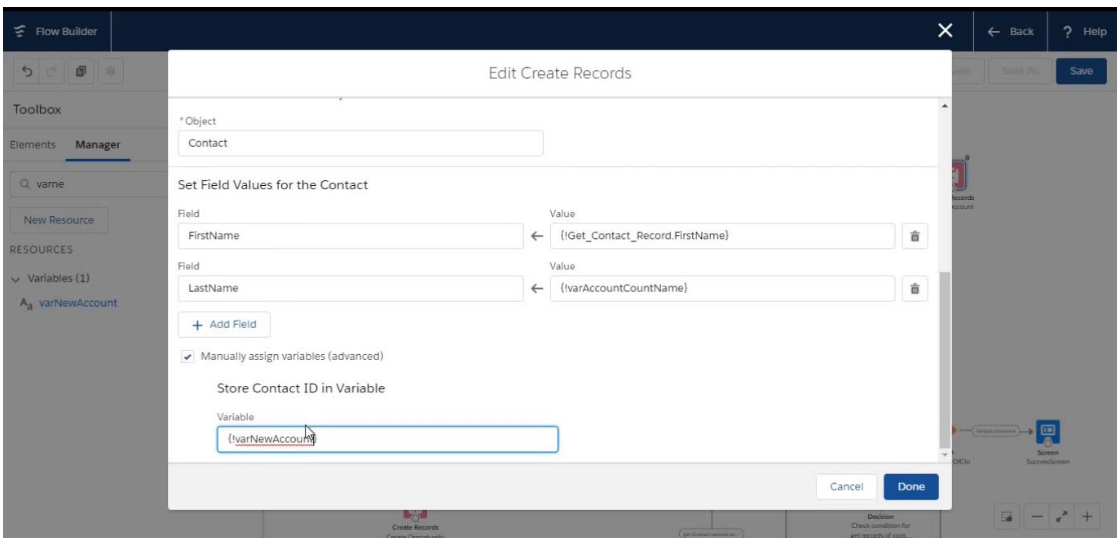




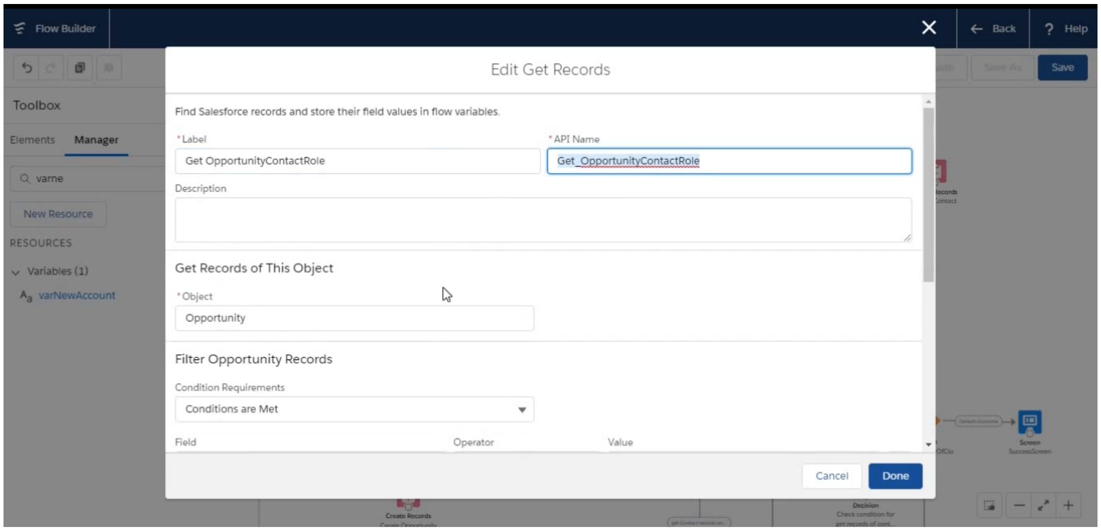
- Click Create Records – **Create Account** and change its label to **Create Contact** and API name, api name is auto populated.



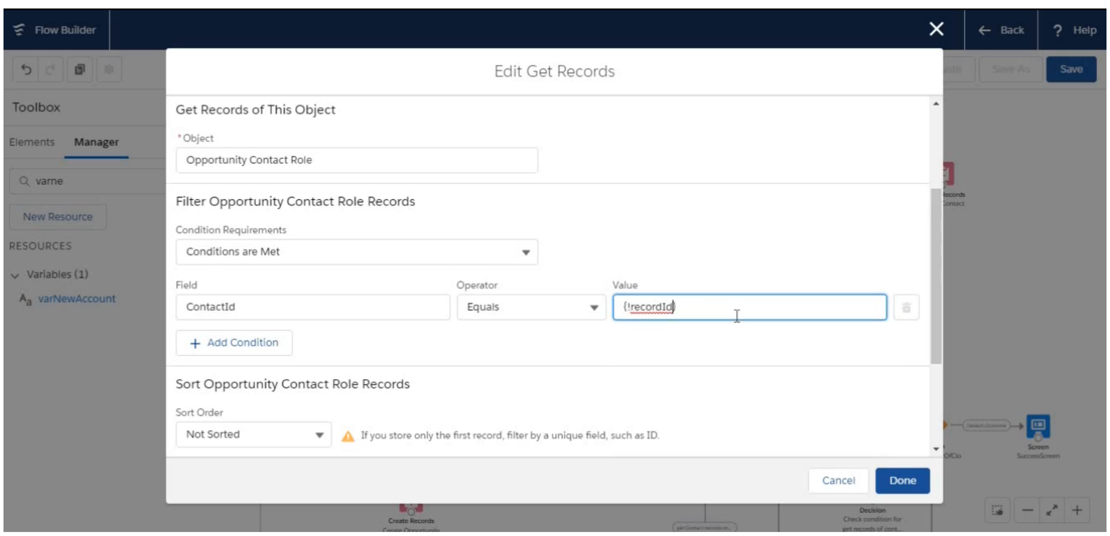
- Change the object from Account to Contact, and add Fields LastName, Equals {!varAccountCountName} and other field as per your choice. ‘Manually assign variables (advanced)’ store the id in {!varNewAccount}. Press done.

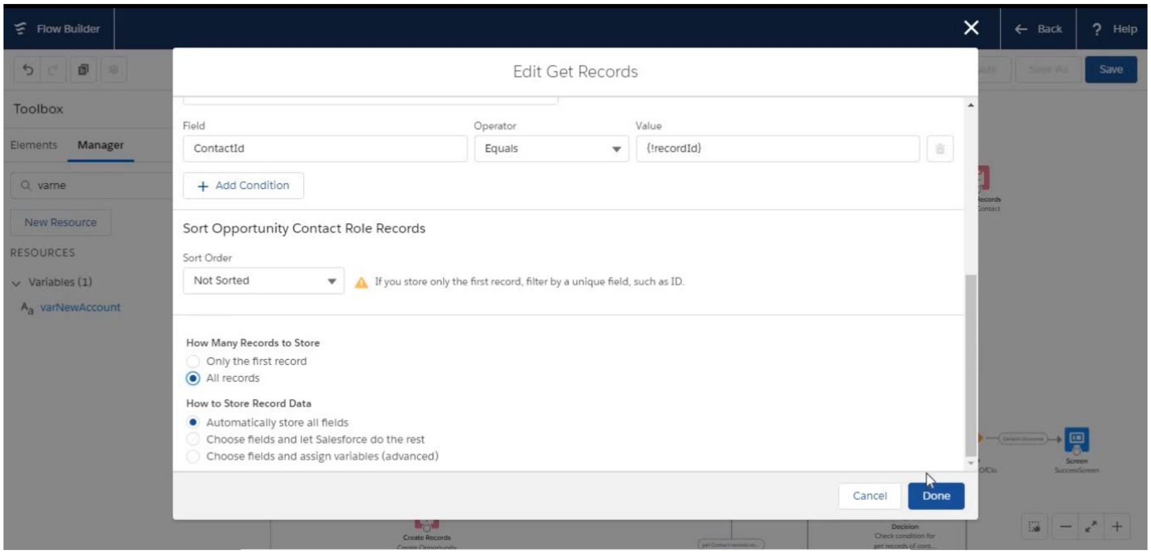


- Now modify Get Records - **Get Opportunity** and change its label to **Get OpportunityContactRole**.

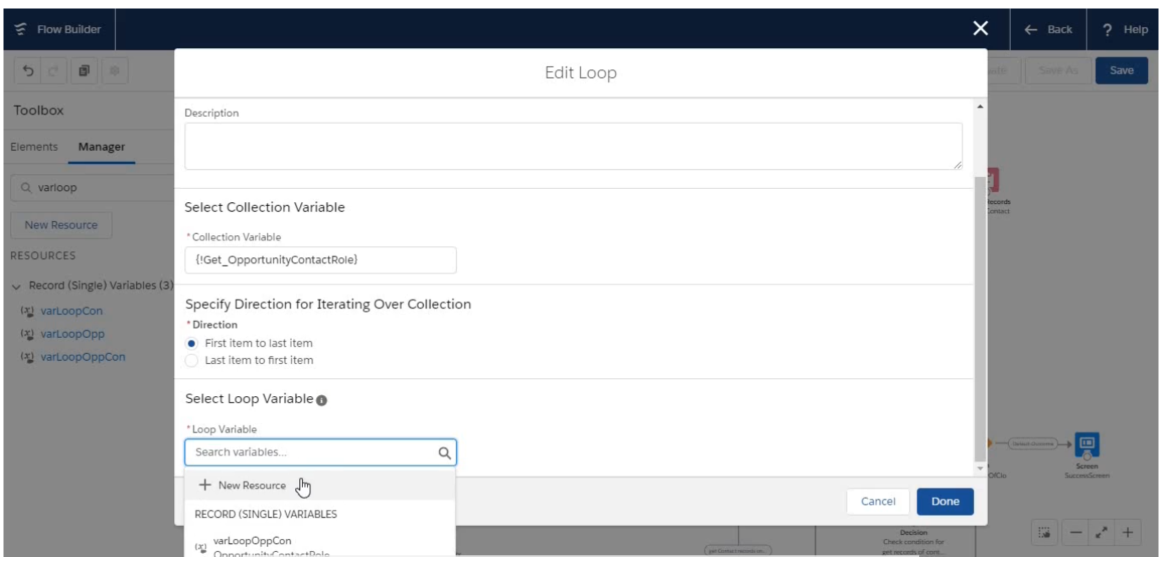


- Change the object from Opportunity to OpportunityContactRole and change record fetching condition to - ContactId equals to {!recordId} and scroll down to how many records to store click on All Records.

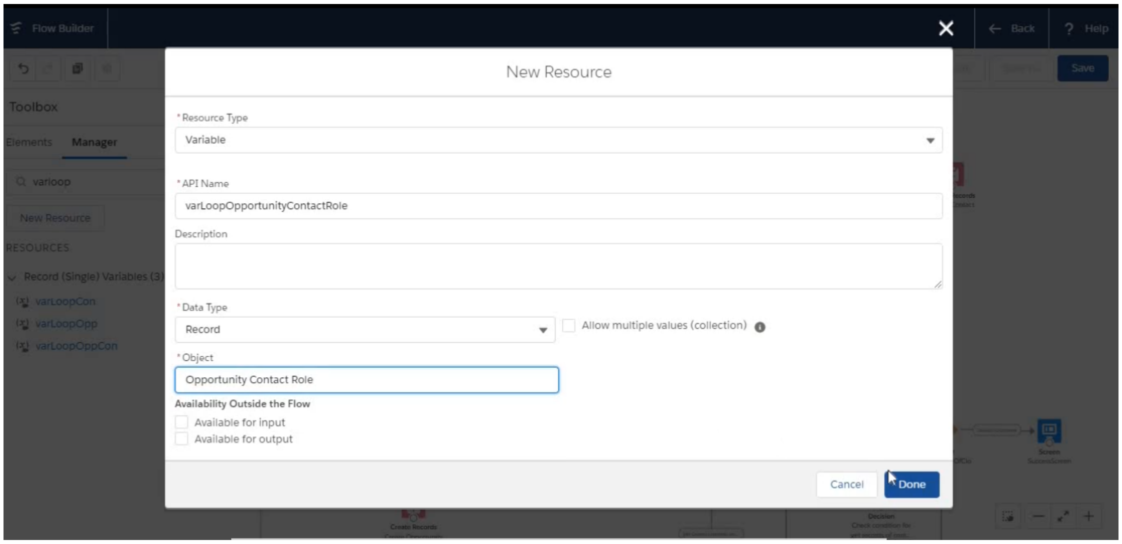




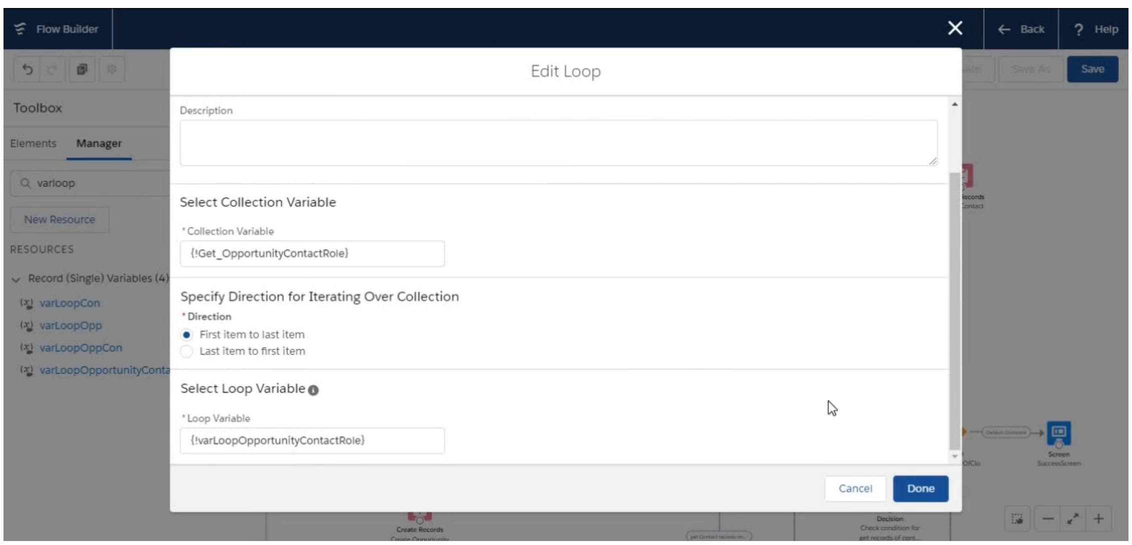
- Change the Loop – **Loop through the OpportunityContactRole, Select Loop Variable** delete the existing and click on New Resource.



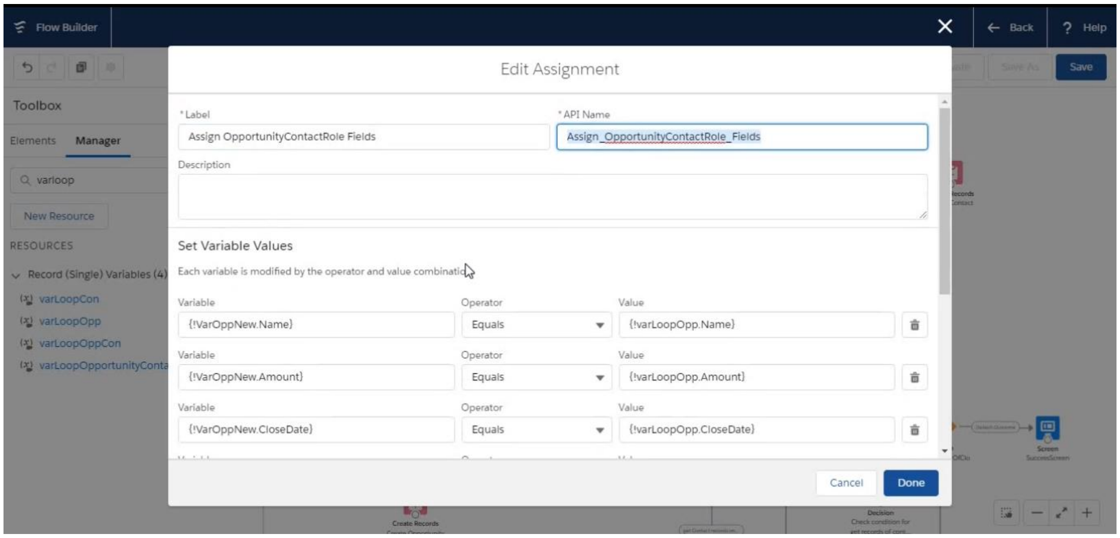
- A popup screen appears. Select Resource Type as Variable, choose API name as varLoopOpportunityContactRole, Data Type as Record and search object OpportunityContactRole and select it and press Done.



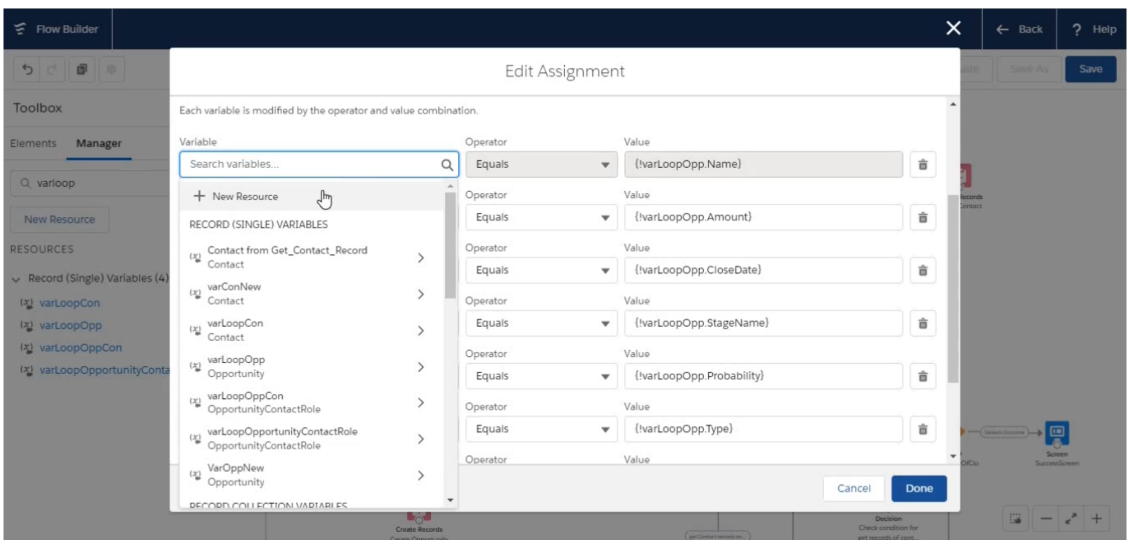
- Edit Loop window appears. In Select Loop Variable select varLoopOpportunityContactRole and press Done.



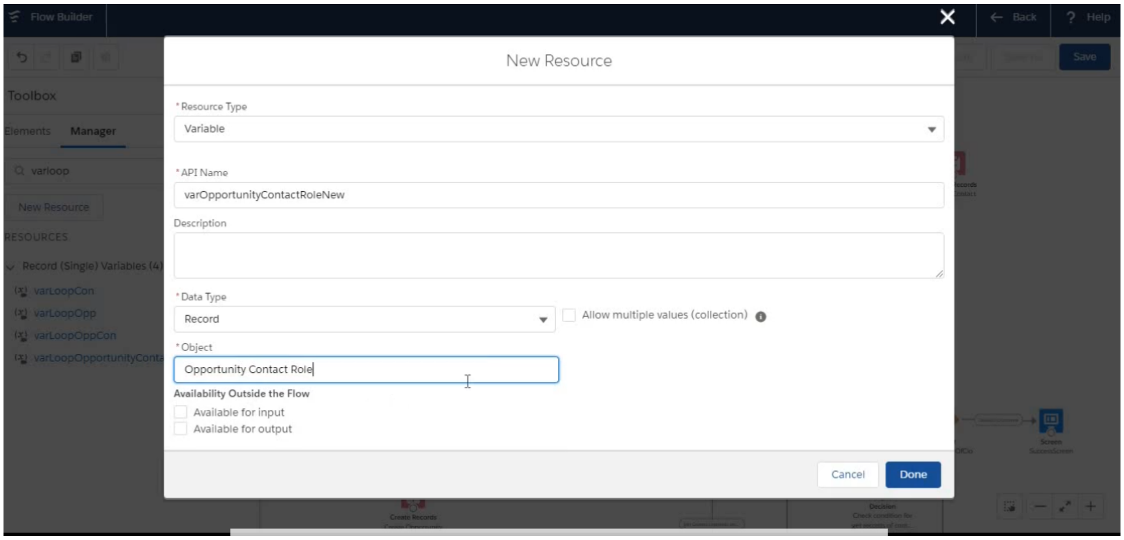
- Click on Assignment – **Assign Opportunity Fields** and change its label to **Assign OpportunityContactRole Fields.**



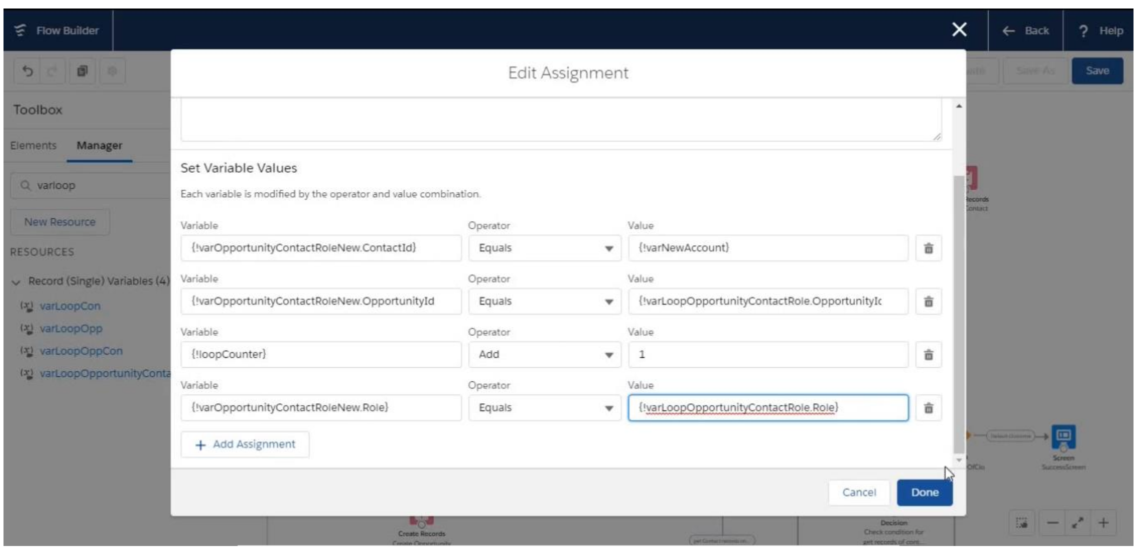
- In Set Variables Values section click on variable delete the existing and click on New Resource.



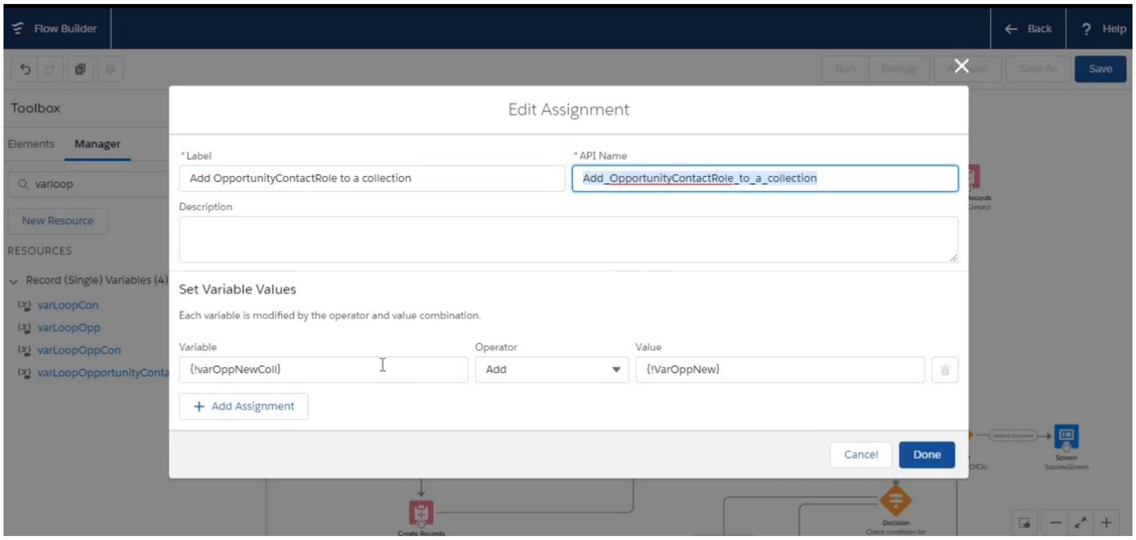
- A popup Screen appears. Select Resource Type as Variable, choose API name as varOpportunityContactRoleNew, Data Type as Record and search object OpportunityContactRole and select it and press Done.



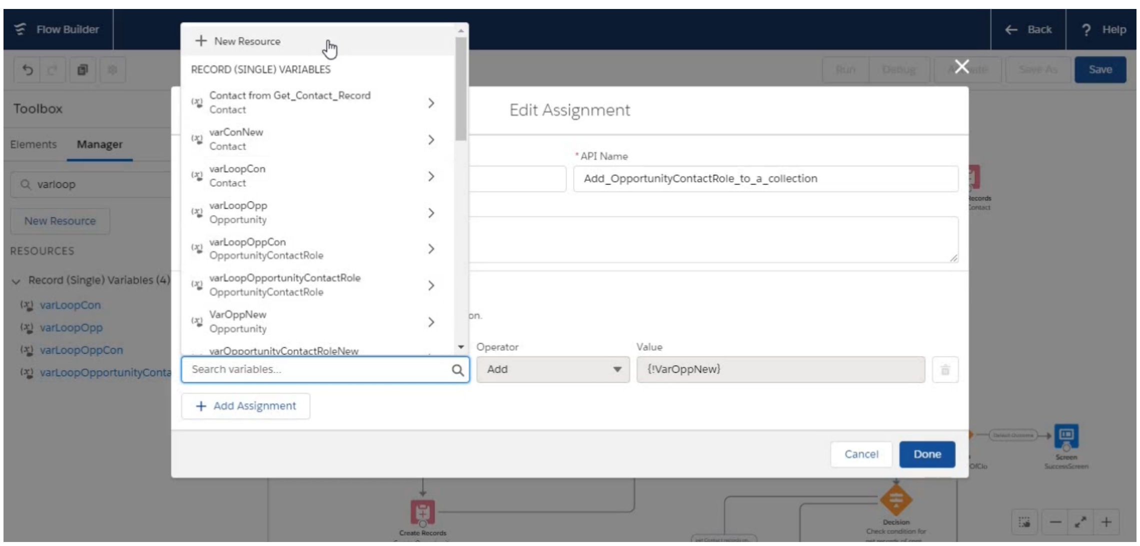
- Set the values of variables choose {!varOpportunityContactRoleNew.ContactId}, equal , {!varNewAccount}. To add a field choose {!varOpportunityContactRoleNew.OpportunityId} equal , {!varLoopOpportunityContactRole.OpportunityId} and you can add more fields as per your choice, and press Done.

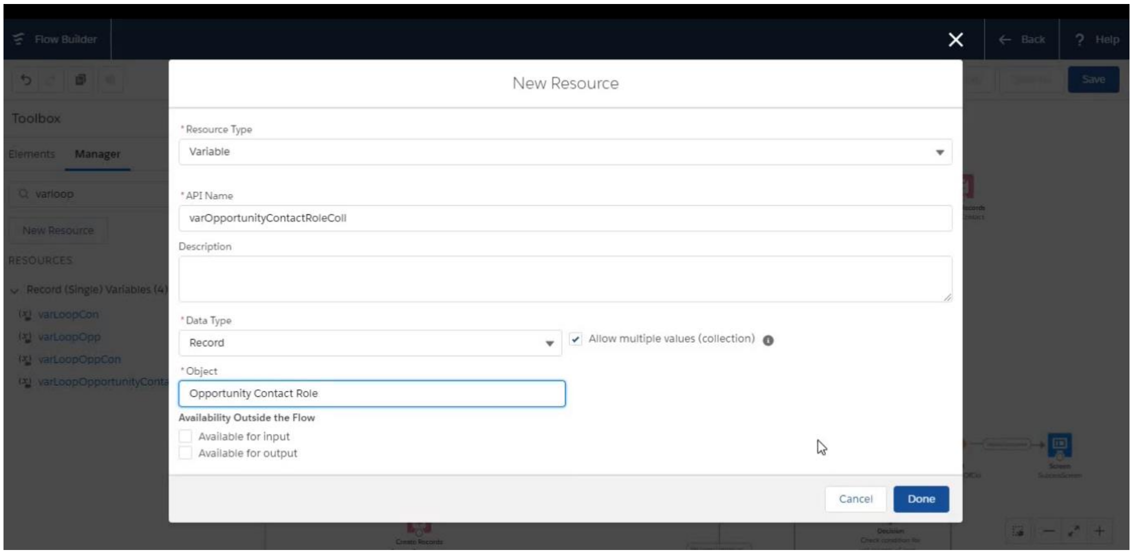


- Click Assignment – **Add Opportunity to a collection** and change its label to **Add OpportunityContactRole to a Collection.**

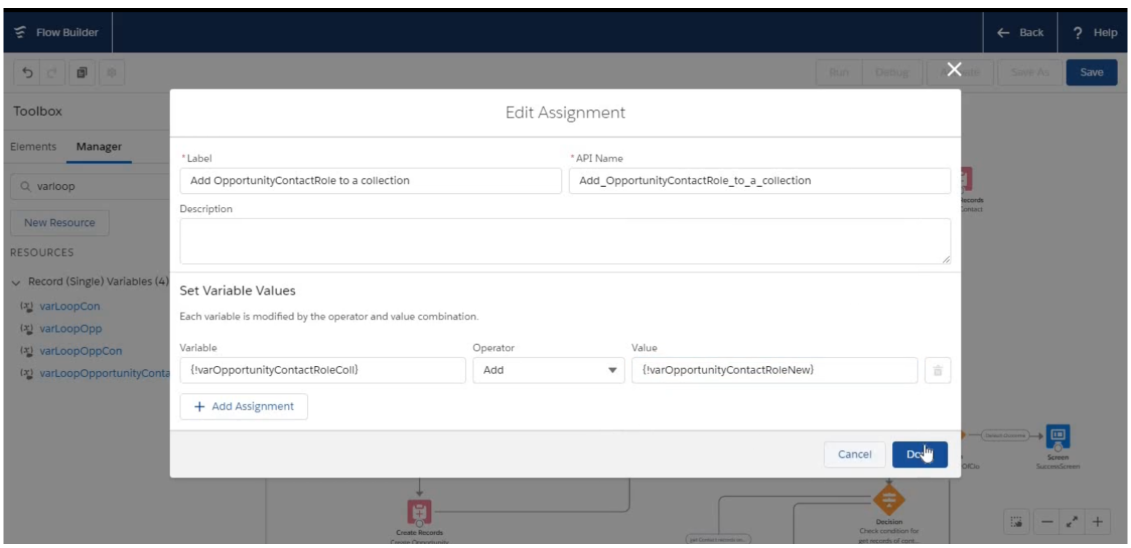


- Click on variable and delete the existing and click on New Resource. Then a popup Screen Appears then choose Resource Type as Variable, choose API name as varOpportunityContactRoleColl, and check the checkbox Allow multiple values (Collection) Data Type as Record and search object OpportunityContactRole and select it and click on done.

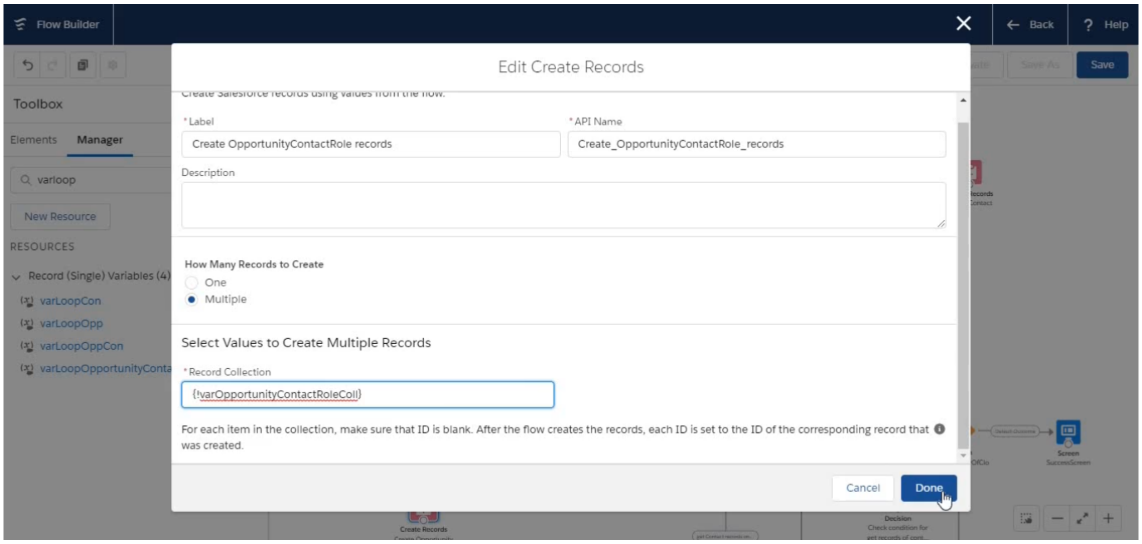




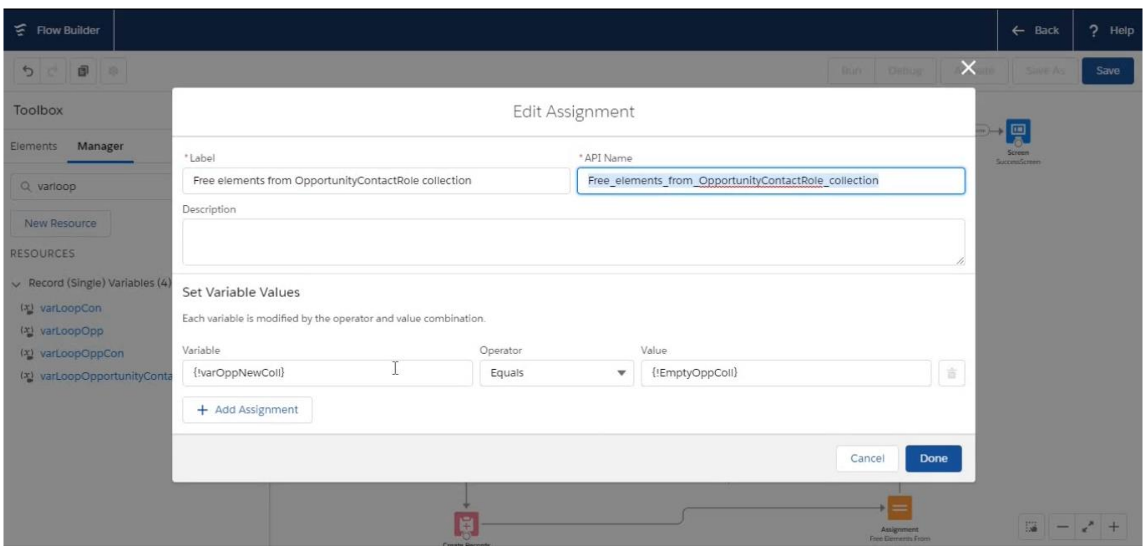
- Now choose the variable {!varOpportunityContactRoleColl} and select operator '**Add**' and choose value {!varOpportunityContactRoleNew} and click on done.



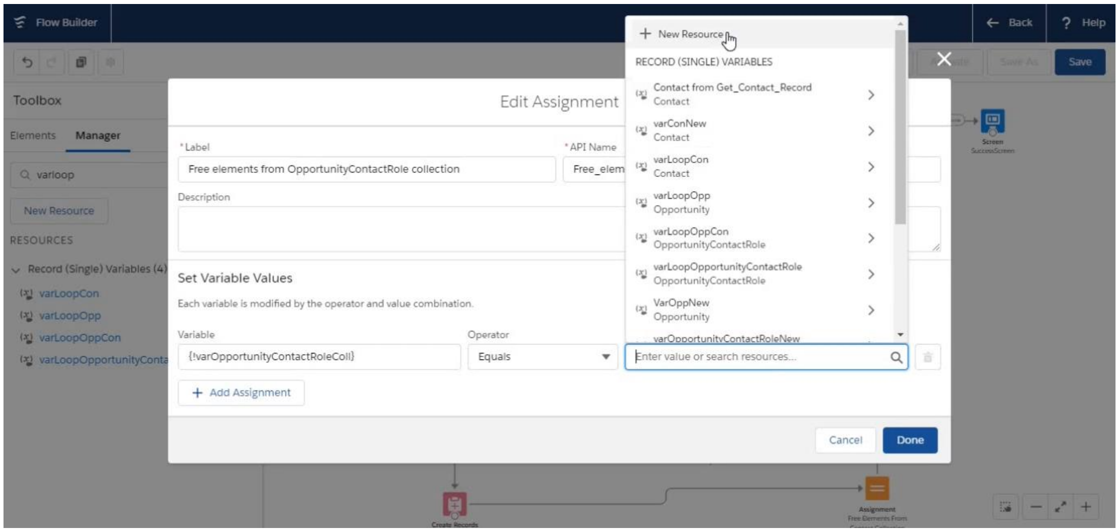
- Click on Create Records – **Create Opportunity** and change its label to **Create OpportunityContactRoles Records** and Multiple to create multiple records and Select values to create Multiple Records record collection as {!varOpportunityContactRoleColl} and click Done.

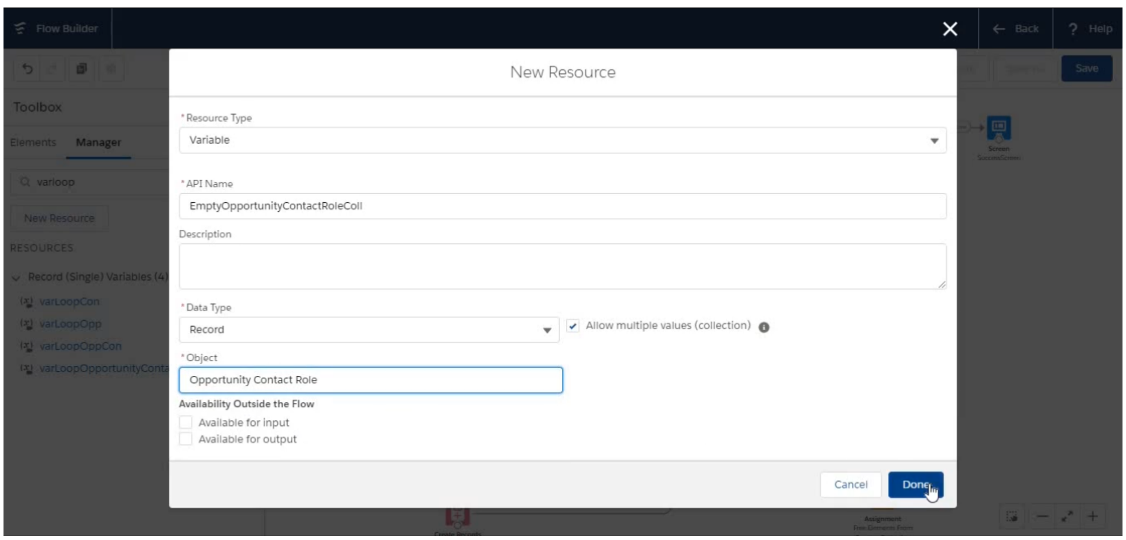


- Click Assignment - **Free Elements from Opportunity Collection** and change its label to **Free Elements from OpportunityContactRole Collection.**

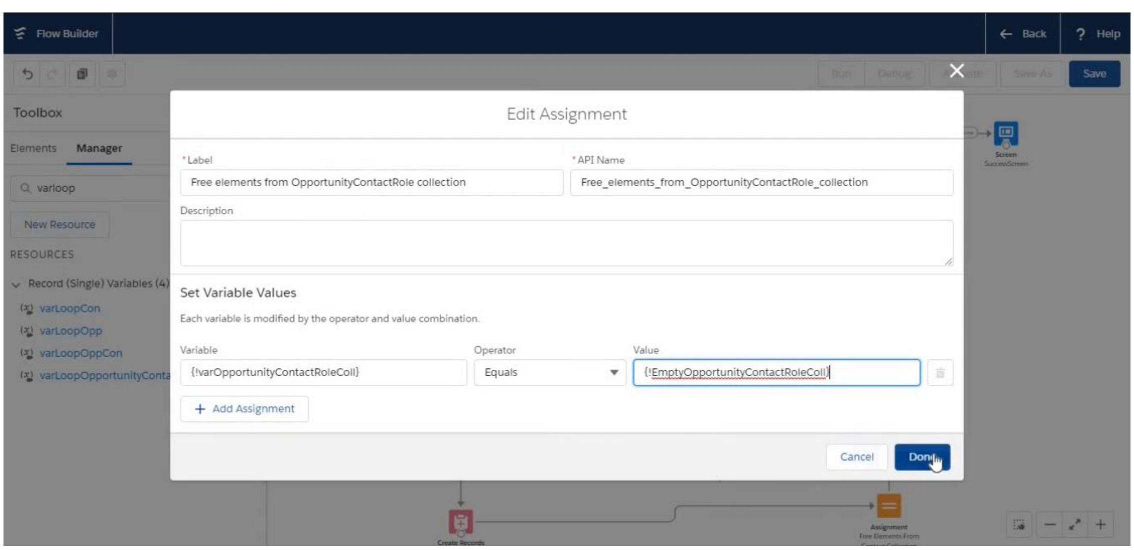


- Choose variable as {!varOpportunityContactRoleColl} and for its value delete the existing and click on new resource Then a popup Screen Appears then choose Resource Type as Variable, choose API name as EmptyOpportunityContactRoleColl, and check the checkbox allow multiple values (Collection) Data Type as Record and search object OpportunityContactRole and select it and click Done.

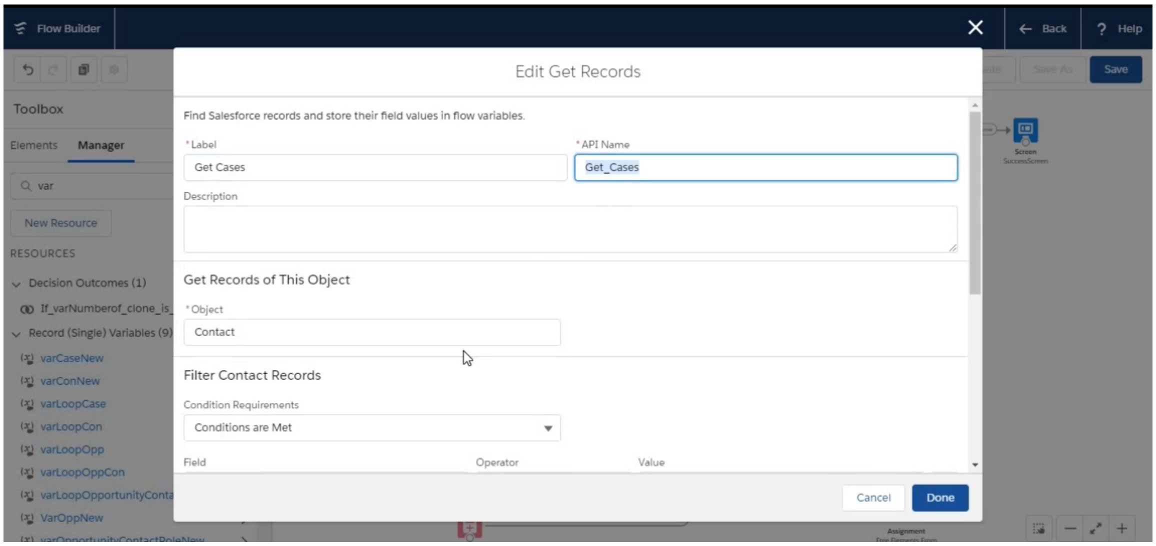




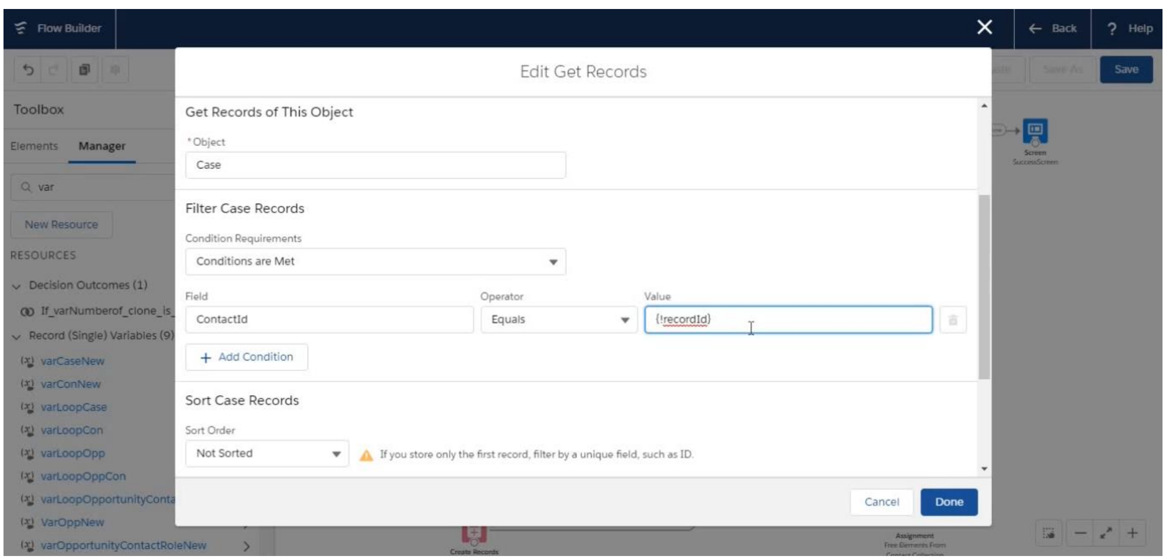
- Then on Edit Assignment window and click on Done.

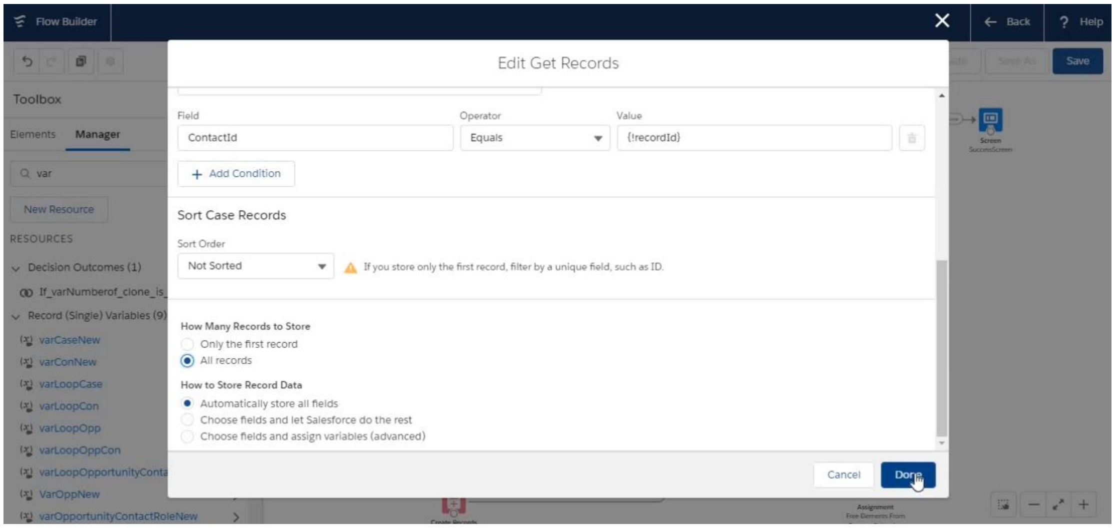


- Then click Get Records - **Get Contact** and change the label to **Get Cases**.

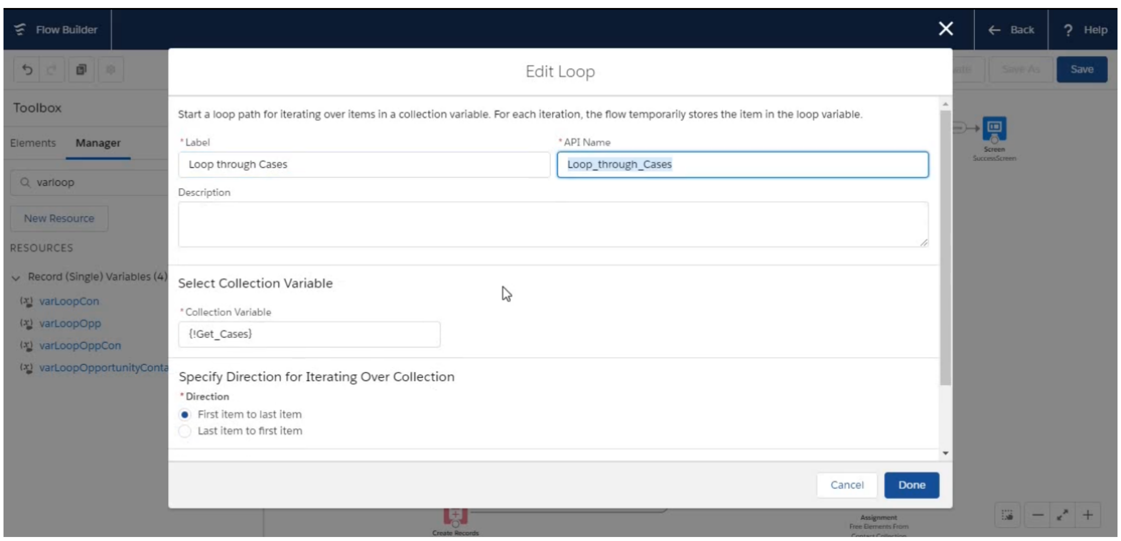


- Change the object from Contact to Case and filter case records as Field Id Equal(operator) and value is{!recordId}. and then select the store All Records and click on done.

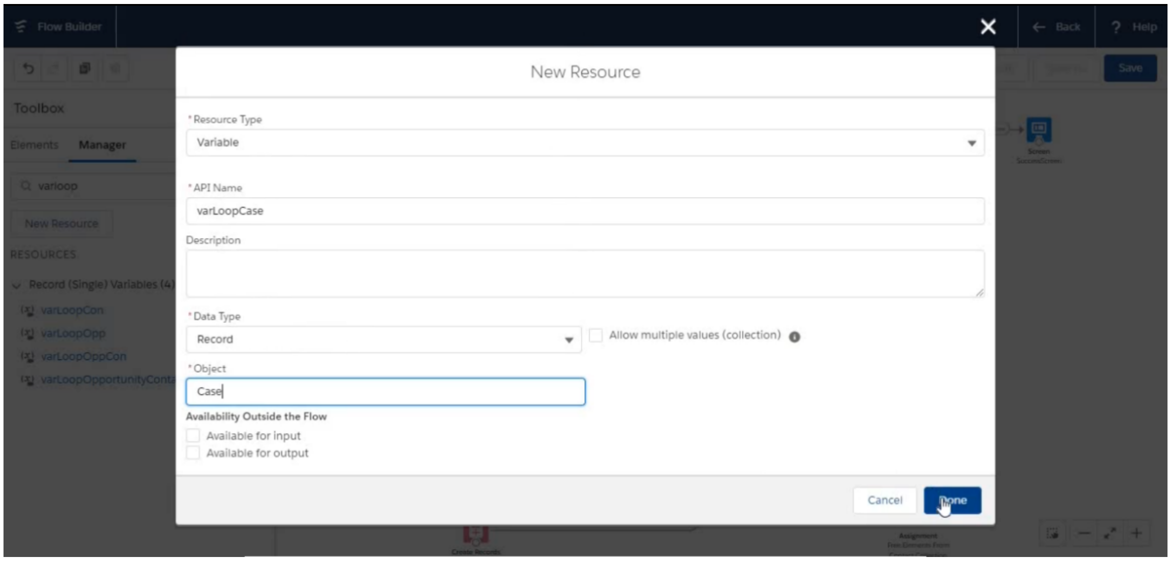




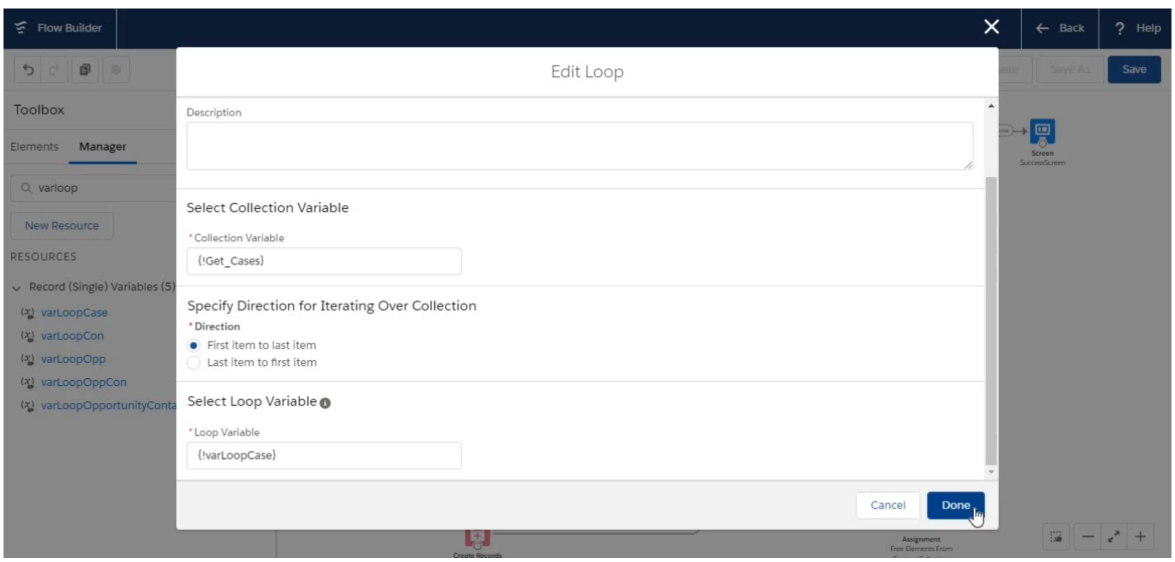
- Modify the Loop – **Loop through Contacts** then change the label **Loop through Cases.**



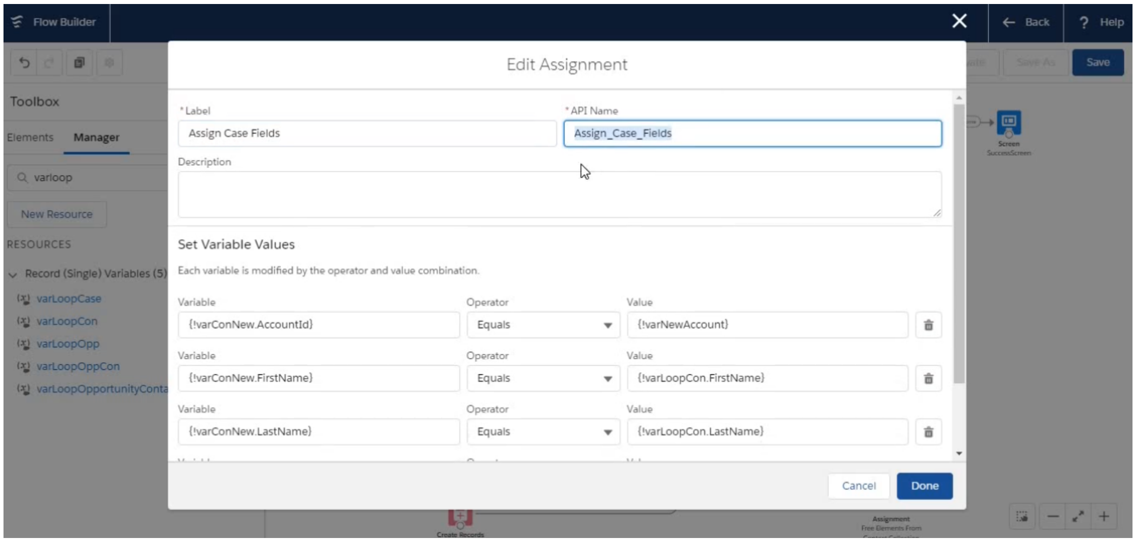
- Select Loop Variable and delete existing and click on New Resource, Then a popup Screen Appears then choose Resource Type as Variable, choose API name as varLoopCase, Data Type as Record and search object Case and select it and click Done.



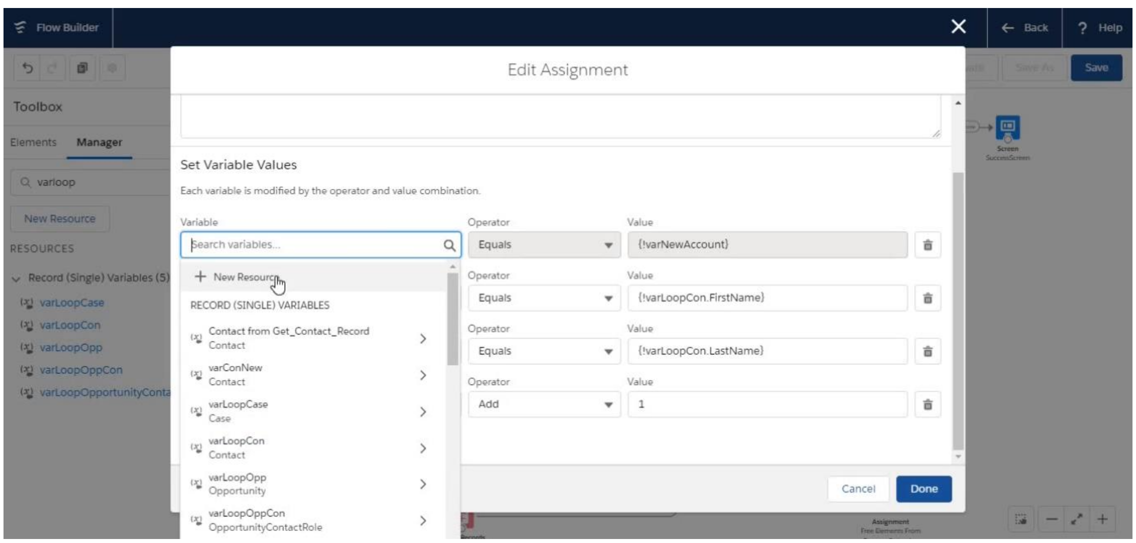
- Then in Edit Loop window click Done.

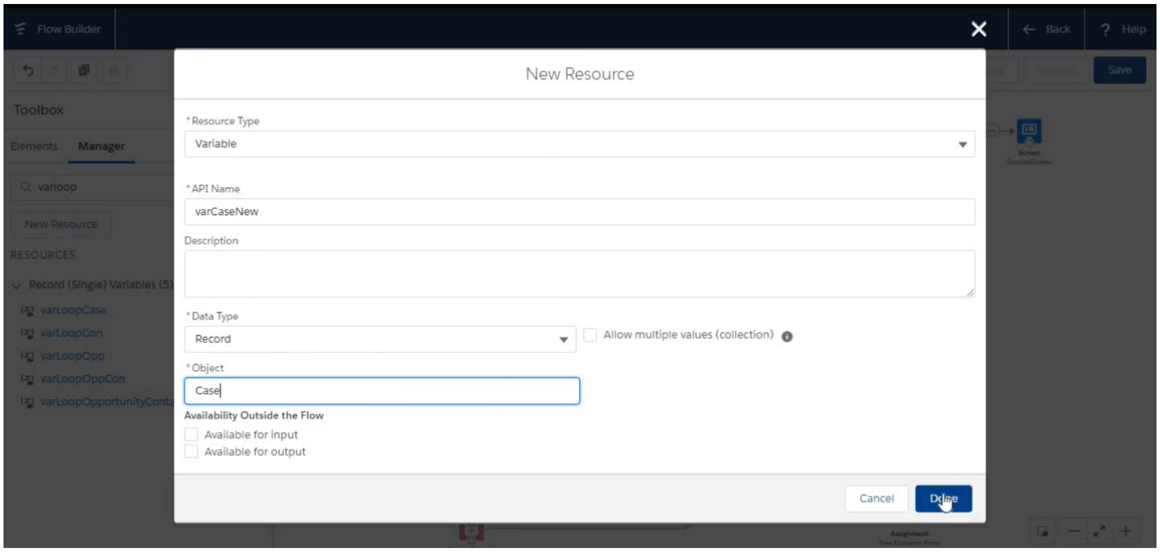


- Click on Assignment - **Assign Contact Fields** and change its label - **Assign Case Field.**

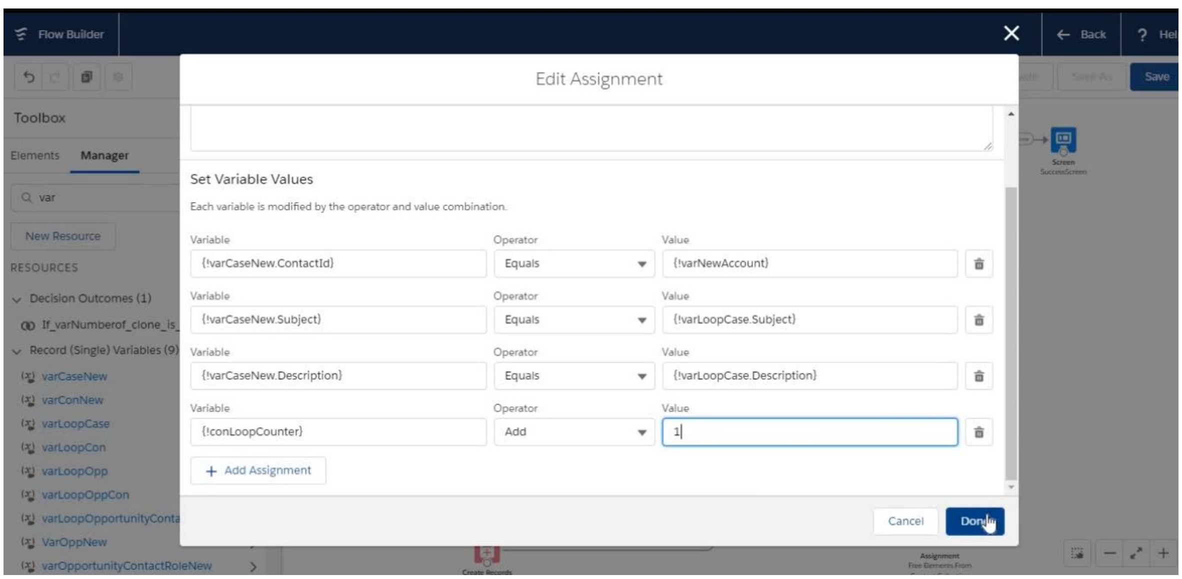


- Click on set Variable Values and select the variable and delete the existing and click on New Resource. Then a popup Screen Appears then choose Resource Type as Variable, choose API name as varCaseNew, Data Type as Record and search object Case and select it and click Done.

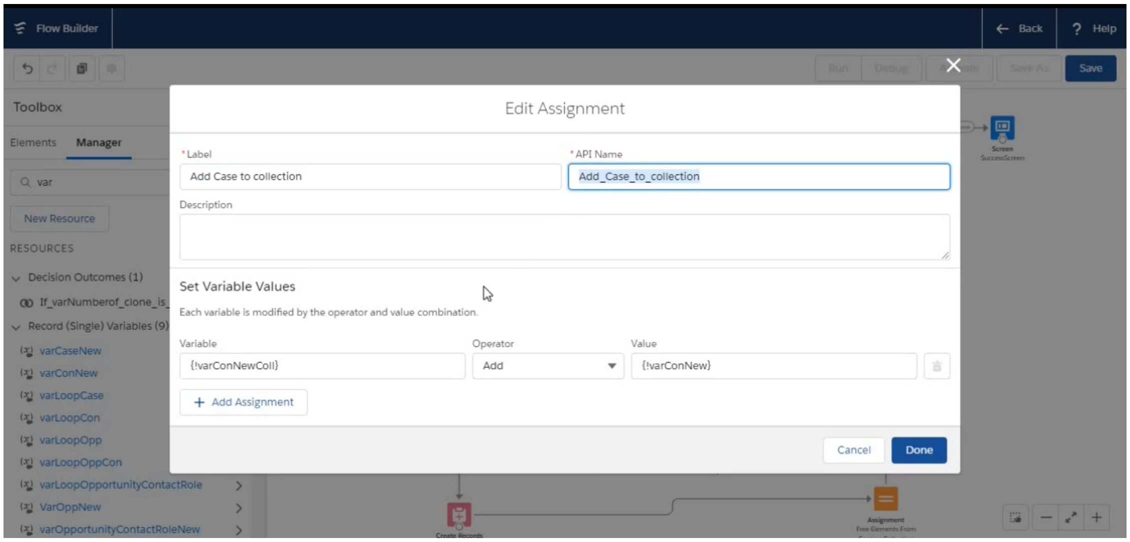




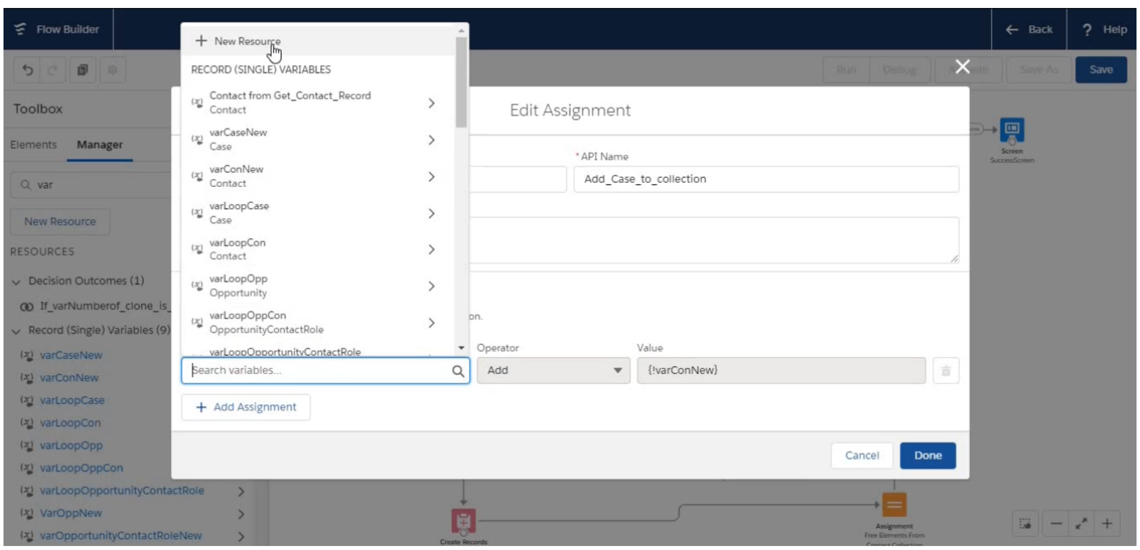
- In variable choose {!varCaseNew.ConatctId}, Equal , {!varNewAccount} and then click on Add Assignment {!varCaseNew.Subject}, equal, {!varLoopCase.Subject} and you can add more fields as per your choice and press Done.

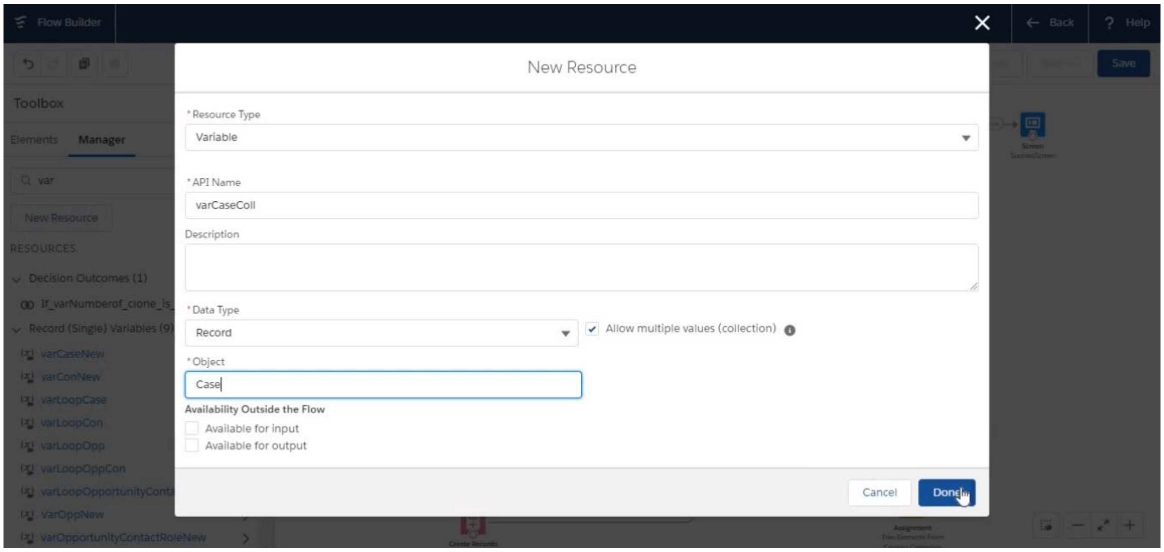


- Now click on Assignment - **Add Contacts to Collection** and change its label **Add Case to Collection.**

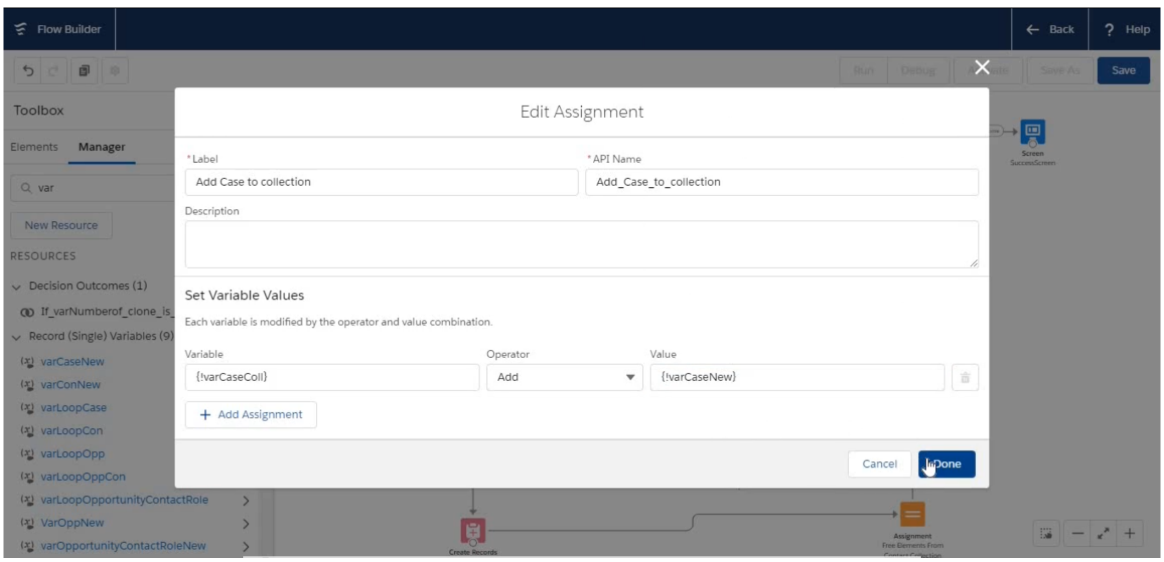


- Click on set Variables values and delete the existing variable and click on New Resource. A popup screen appears, choose Resource Type as Variable, choose API name as varCaseColl, and check the Allow Multiple Values(Collection), Data Type as Record and search object Case and select it and click Done.

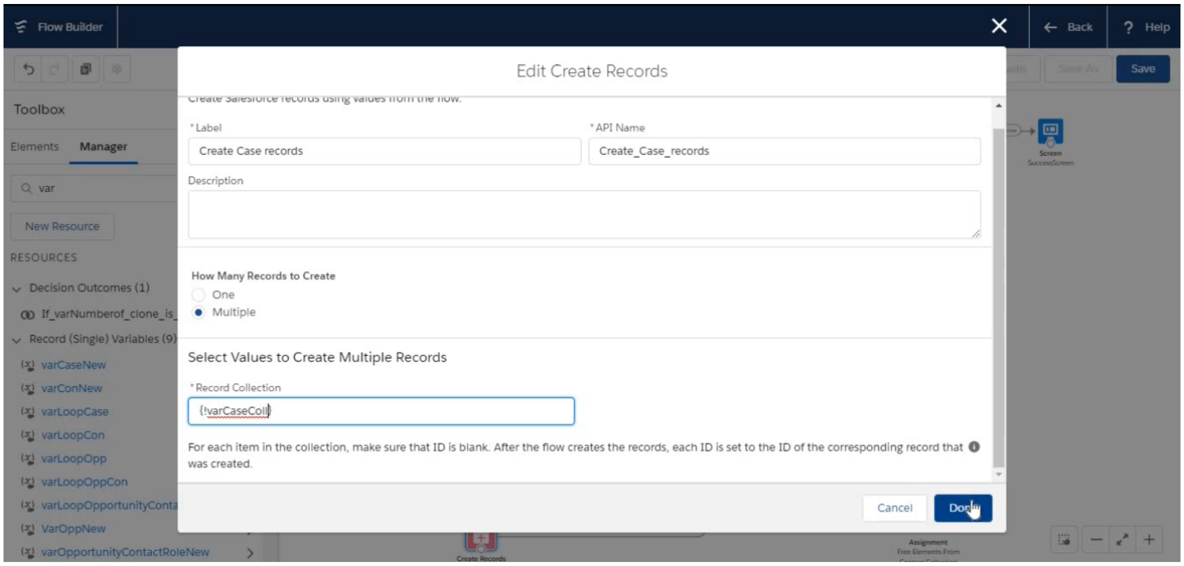




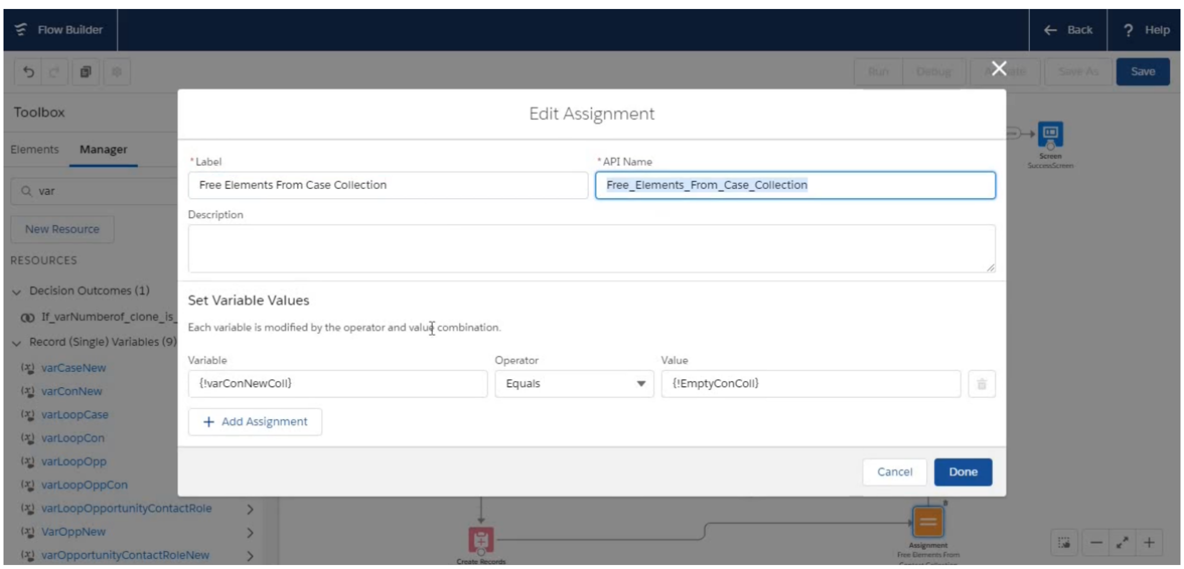
- Put {!varCaseColl} in variable, {!varCaseNew } in value Field & operator should be Add, click done.



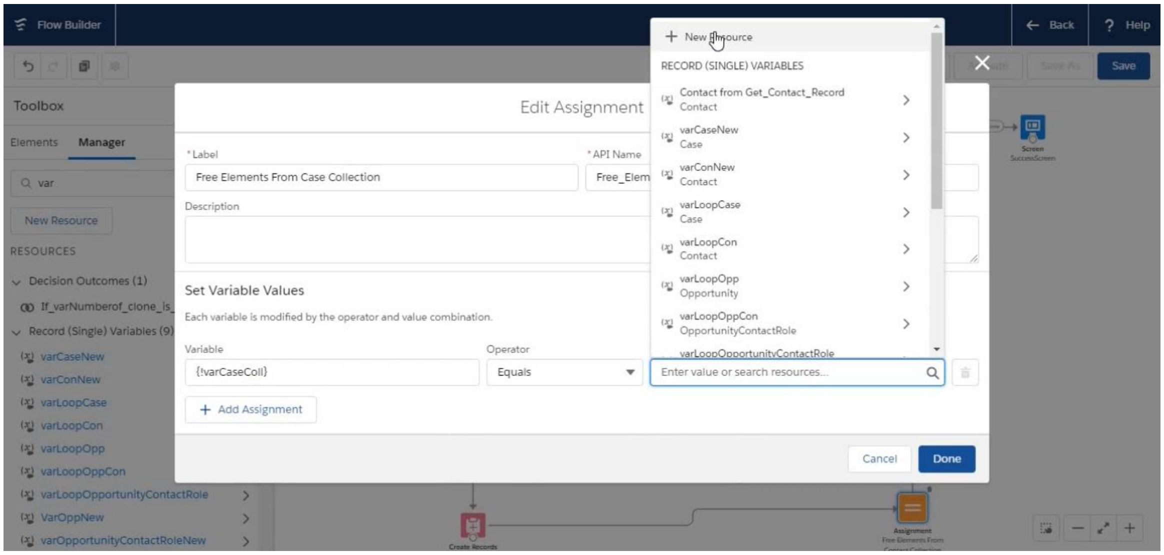
- Click on Create Records - **Create Contacts Records** and change its label to **Create Case Records** and choose record collection – {!varCaseColl} and Done.

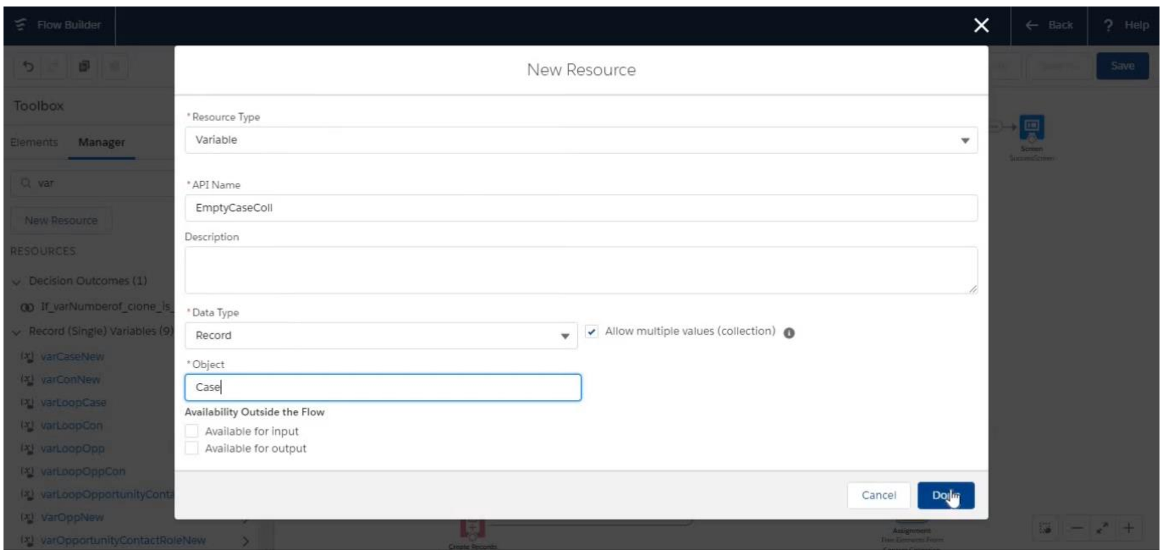


- Click on Assignment - **Free Elements from Contact Collection** and change its label to **Free Elements from Case Collection.**

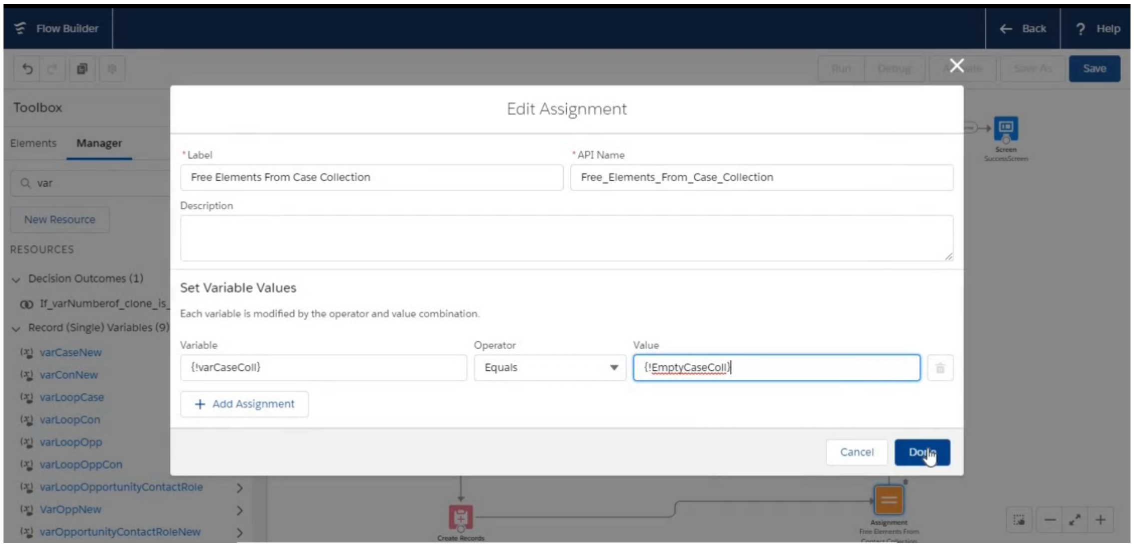


- Click on variable and delete the existing and select {!varCaseColl} and for its values section delete the existing and click on new Resource. Then a popup Screen Appears then choose Resource Type as Variable, choose API name as EmptyCaseColl, and check the Allow Multiple Values(Collection), Data Type as Record and search object Case and select it and Done.

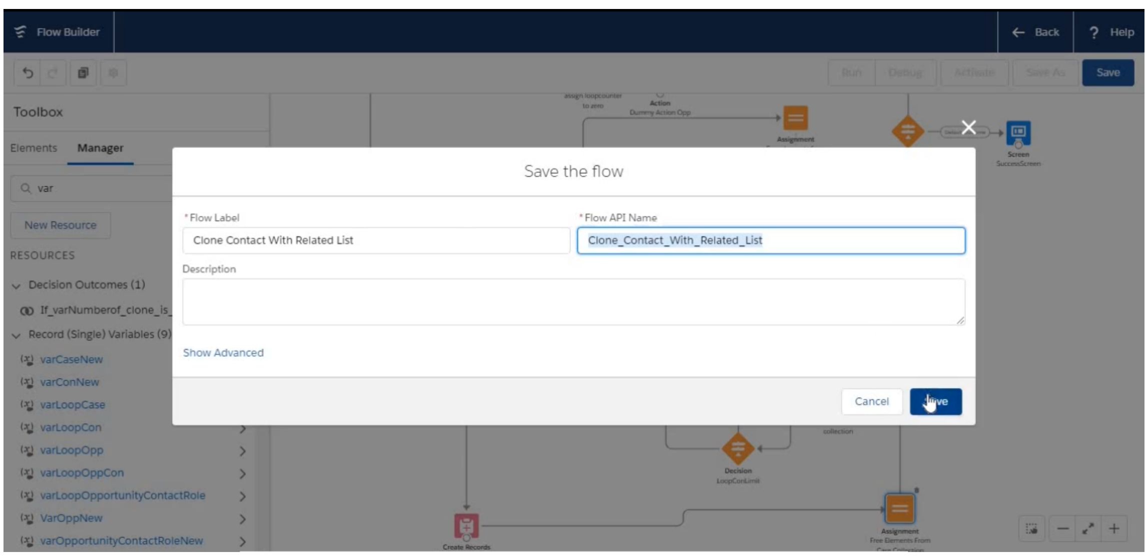




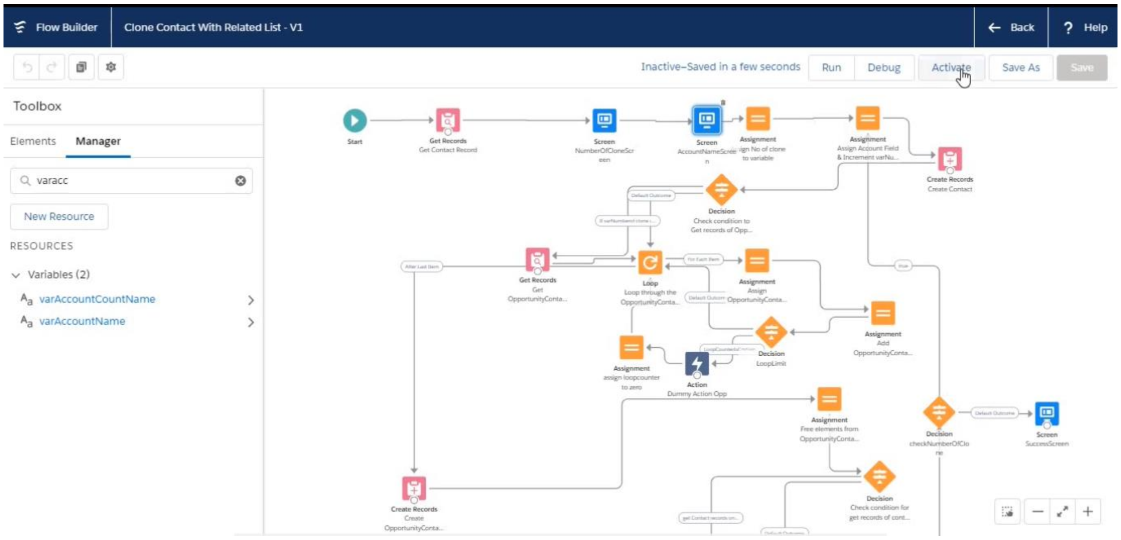
- In Edit Assignment window choose value as {!EmptyCaseColl} and press Done.

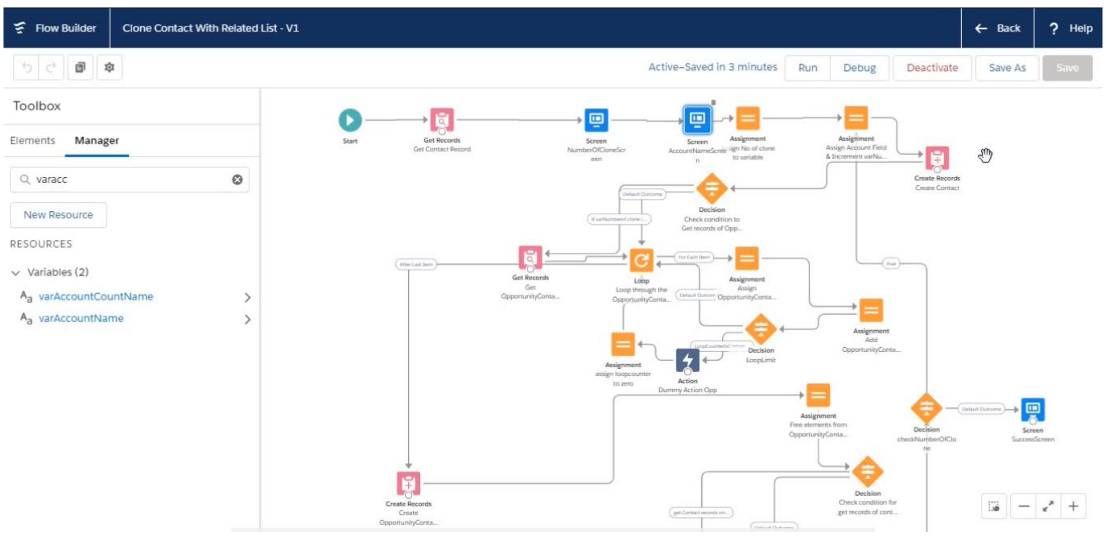


- Click **Save** button on the top Right of the screen and save the flow. Change the Flow label to – **Clone Contact With Related List** and the API Name will be auto populated and click Save.

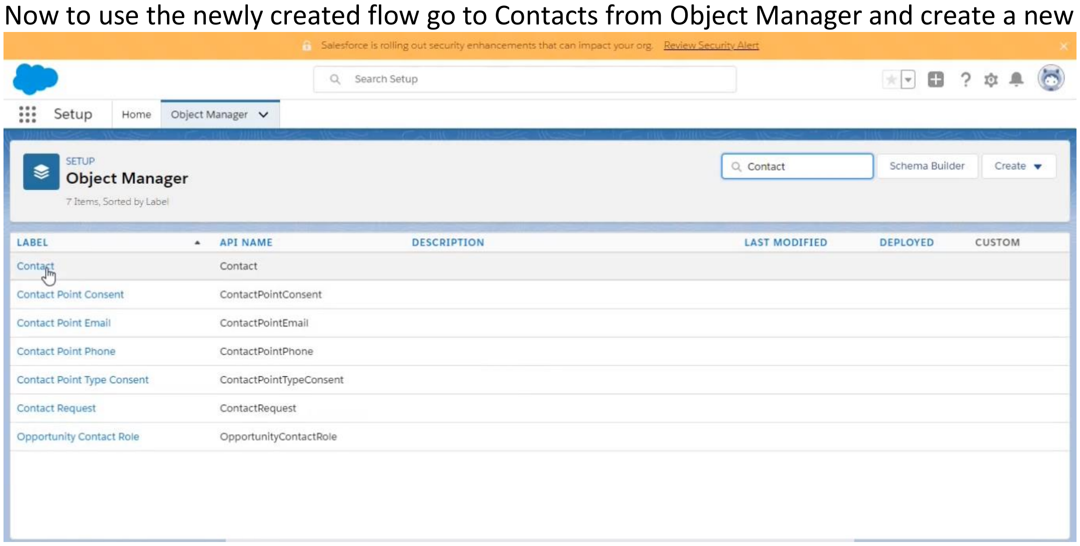


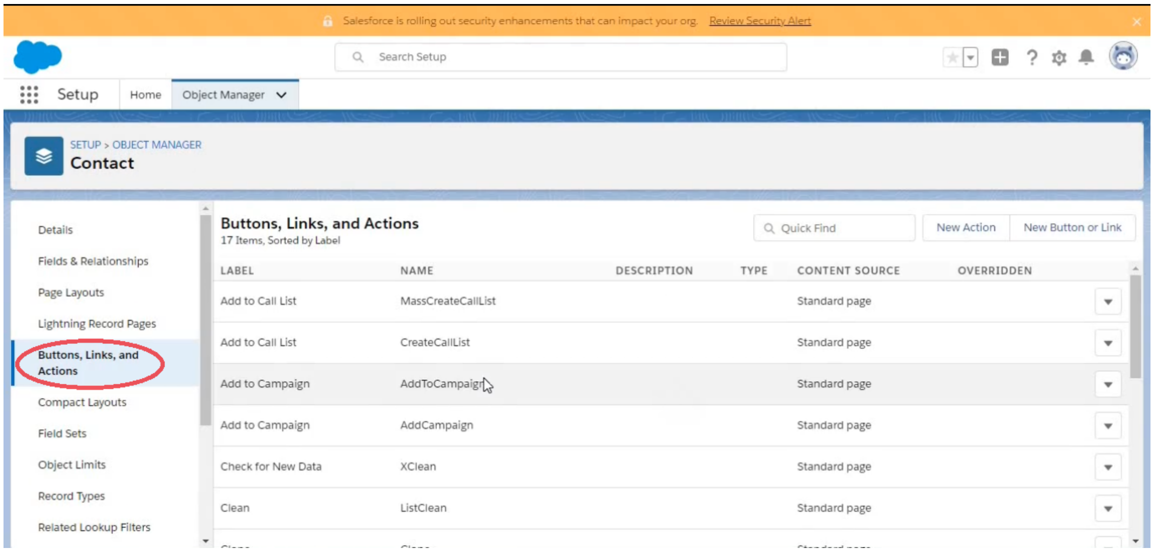
- Activate it.



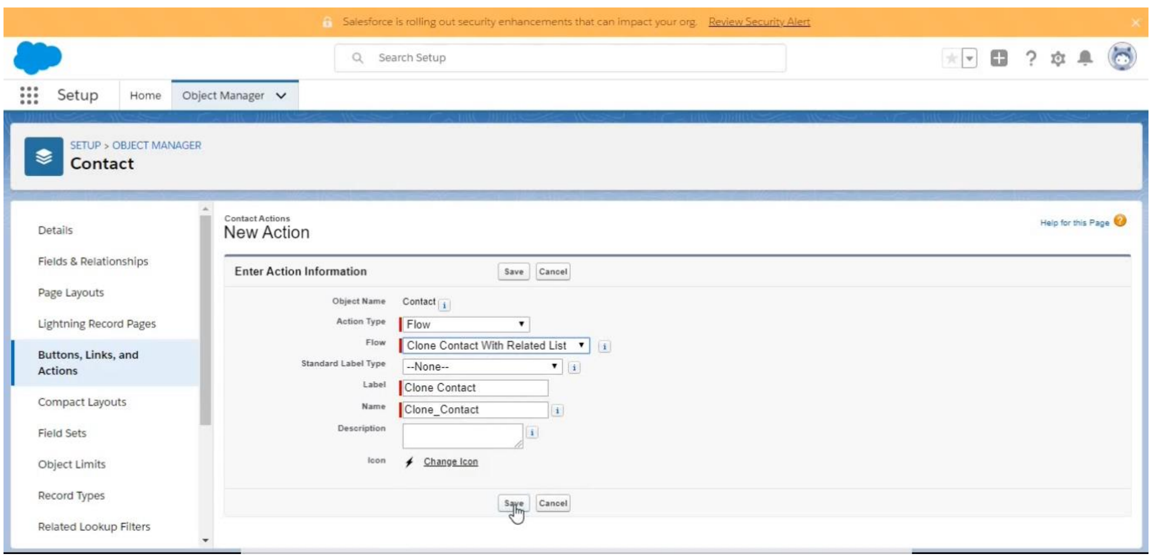


- Now to use the newly created flow go to Contacts from Object Manager and create a new Action.

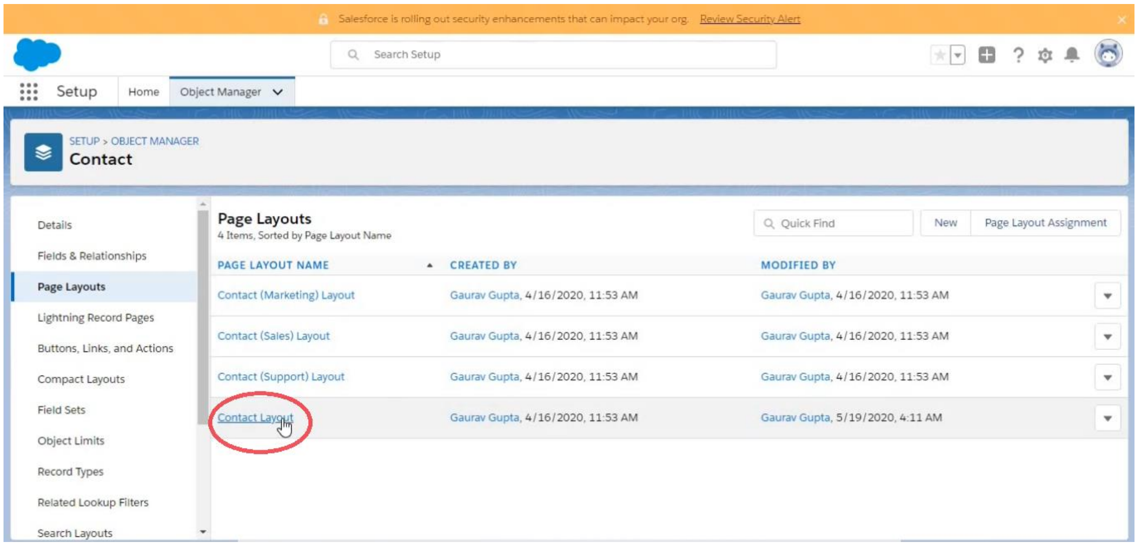


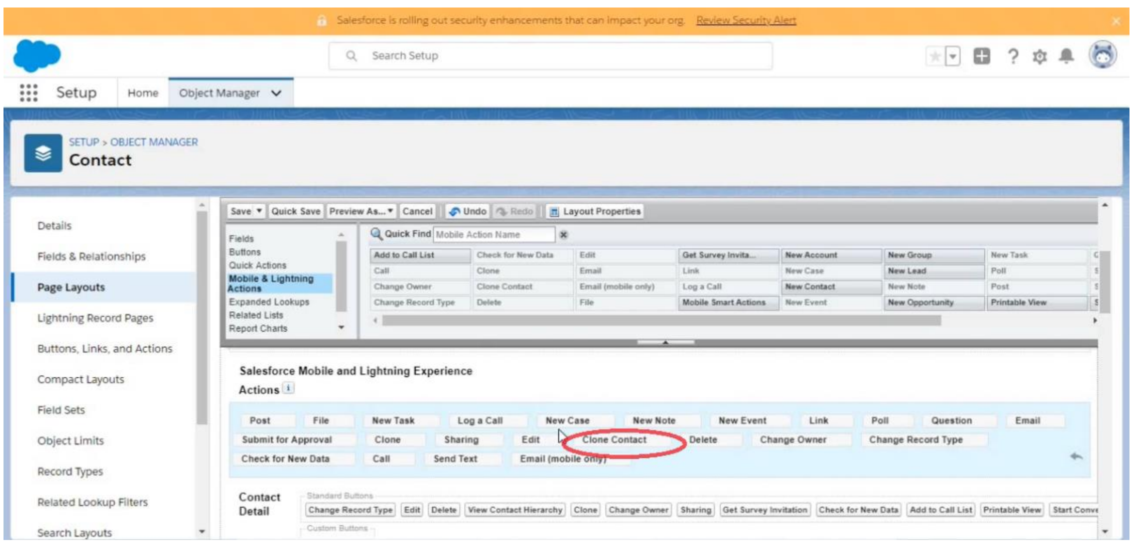


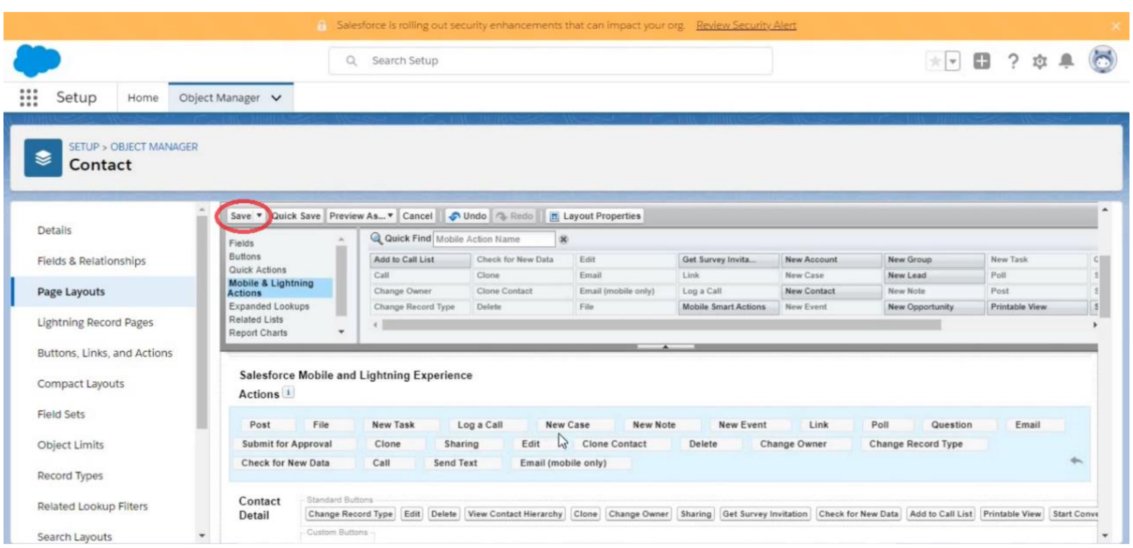
- In Action Type choose Flow and select 'Clone Contact With Related List' as Flow. Enter the Label – Clone Contact and the Name will be auto populated and Save it.



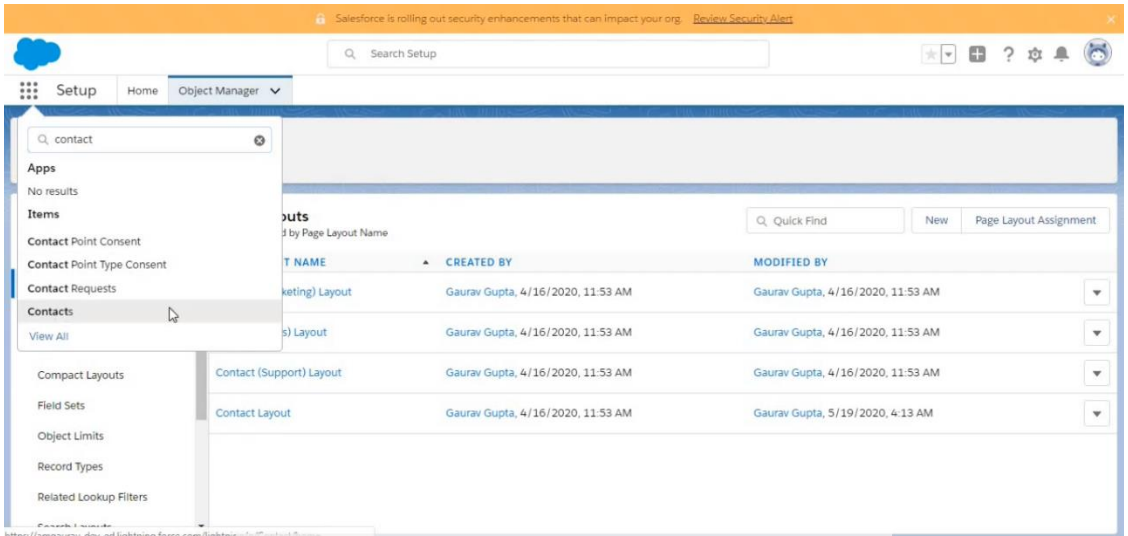
- Edit the Contact Page Layouts and add the **Clone Contact** action from Mobile & Lightning Actions to Salesforce Mobile & Lightning Experience Actions and Save.


Salesforce is rolling out security enhancements that can impact your org. Review Security Alert
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Contact
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Page Layouts
4 Items, Sorted by Page Layout Name
Quick Find
New
Page Layout Assignment
PAGE LAYOUT NAME
CREATED BY
MODIFIED BY
Contact (Marketing) Layout
Gaurav Gupta, 4/16/2020, 11:53 AM
Gaurav Gupta, 4/16/2020, 11:53 AM
Contact (Sales) Layout
Gaurav Gupta, 4/16/2020, 11:53 AM
Gaurav Gupta, 4/16/2020, 11:53 AM
Contact (Support) Layout
Gaurav Gupta, 4/16/2020, 11:53 AM
Gaurav Gupta, 4/16/2020, 11:53 AM
Contact Layout
Gaurav Gupta, 4/16/2020, 11:53 AM
Gaurav Gupta, 5/19/2020, 4:11 AM

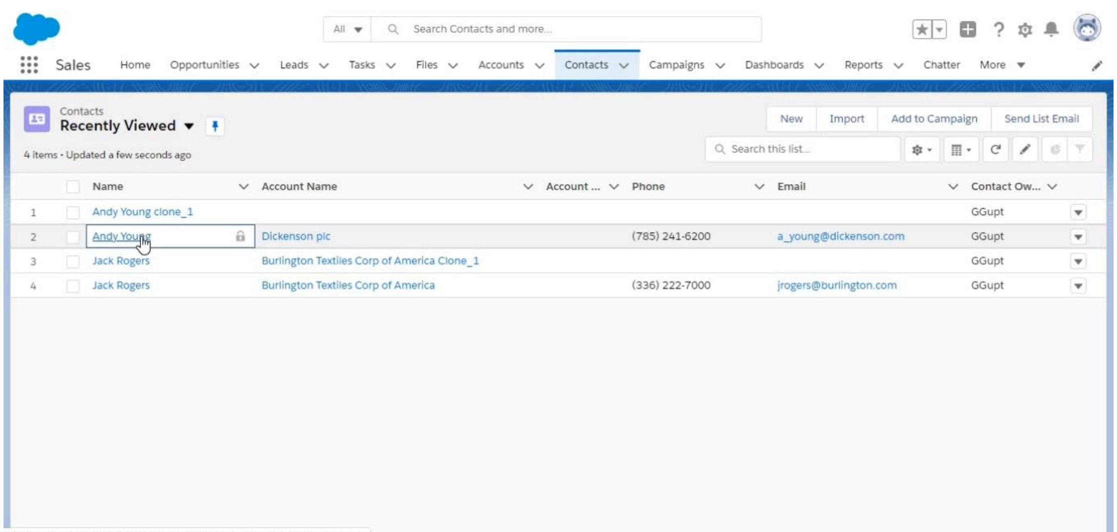

Salesforce is rolling out security enhancements that can impact your org. Review Security Alert
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Contact
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts
Quick Find
Mobile Action Name
Salesforce Mobile and Lightning Experience
Actions
Post
File
New Task
Log a Call
New Case
New Note
New Event
Link
Poll
Question
Email
Submit for Approval
Clone
Sharing
Edit
Clone Contact
Delete
Change Owner
Change Record Type
Check for New Data
Call
Send Text
Email (mobile only)
Contact Detail
Standard Buttons
Change Record Type
Edit
Delete
View Contact Hierarchy
Clone
Change Owner
Sharing
Get Survey Invitation
Check for New Data
Add to Call List
Printable View
Custom Buttons

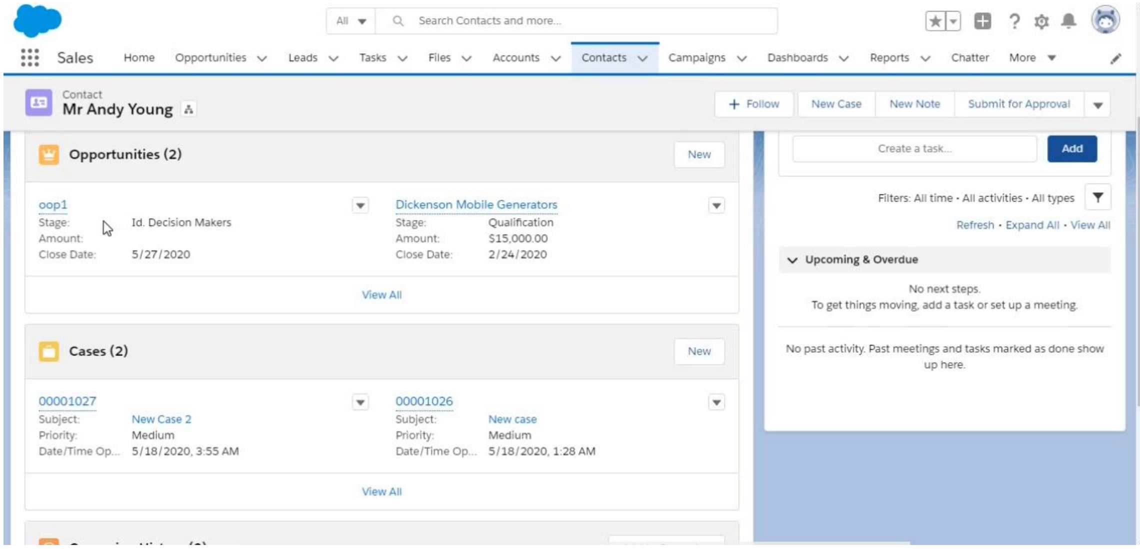

Salesforce is rolling out security enhancements that can impact your org. Review Security Alert
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Contact
Save
Quick Save
Preview As...
Cancel
Undo
Redo
Layout Properties
Salesforce Mobile and Lightning Experience
Actions
Post
File
New Task
Log a Call
New Case
New Note
New Event
Link
Poll
Question
Email
Submit for Approval
Clone
Sharing
Edit
Clone Contact
Delete
Change Owner
Change Record Type
Check for New Data
Call
Send Text
Email (mobile only)
Contact Detail

- To see how the flow works go to Contacts.

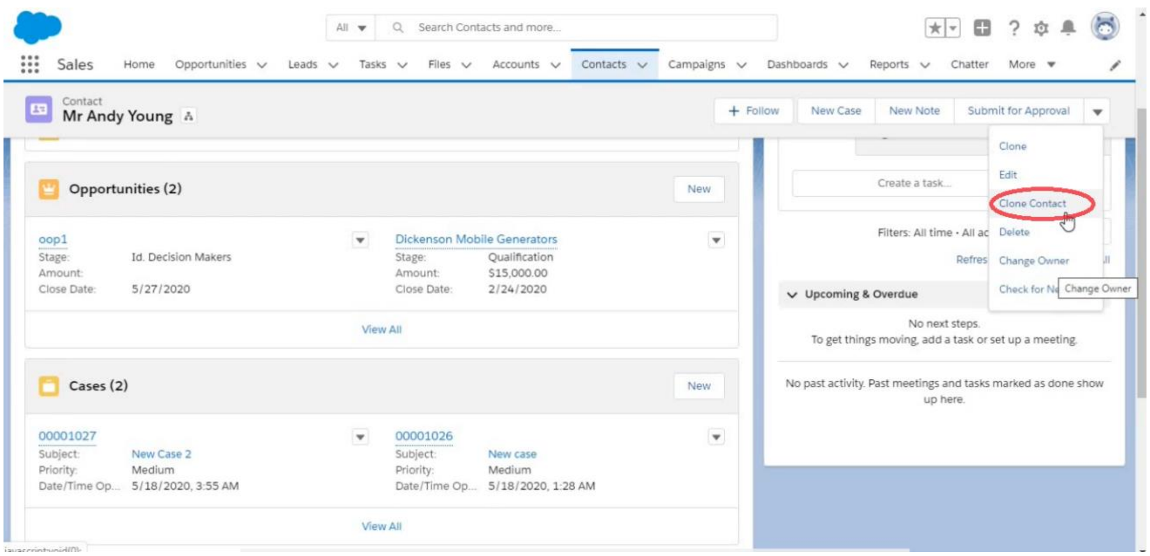


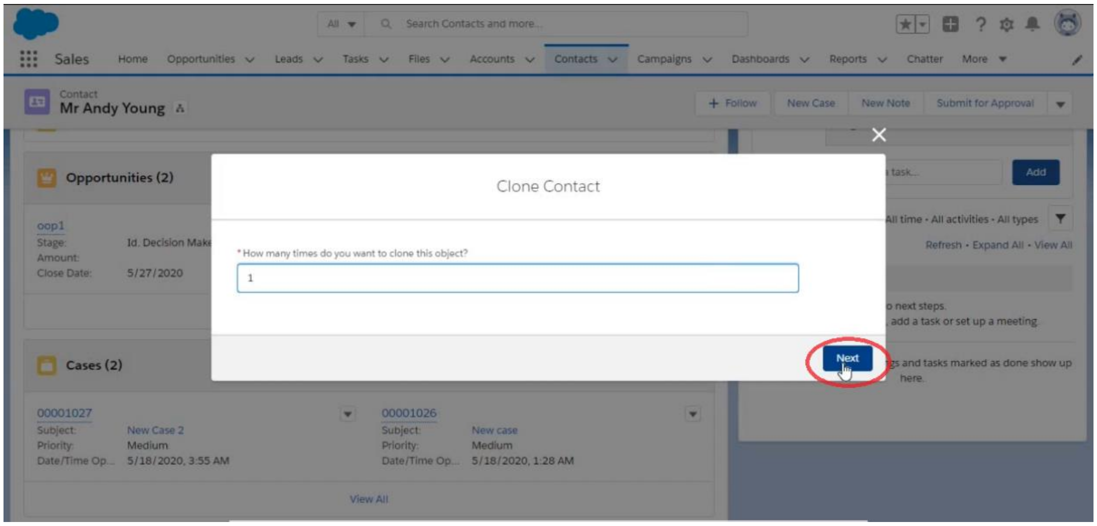
- Select a contact you want to clone.

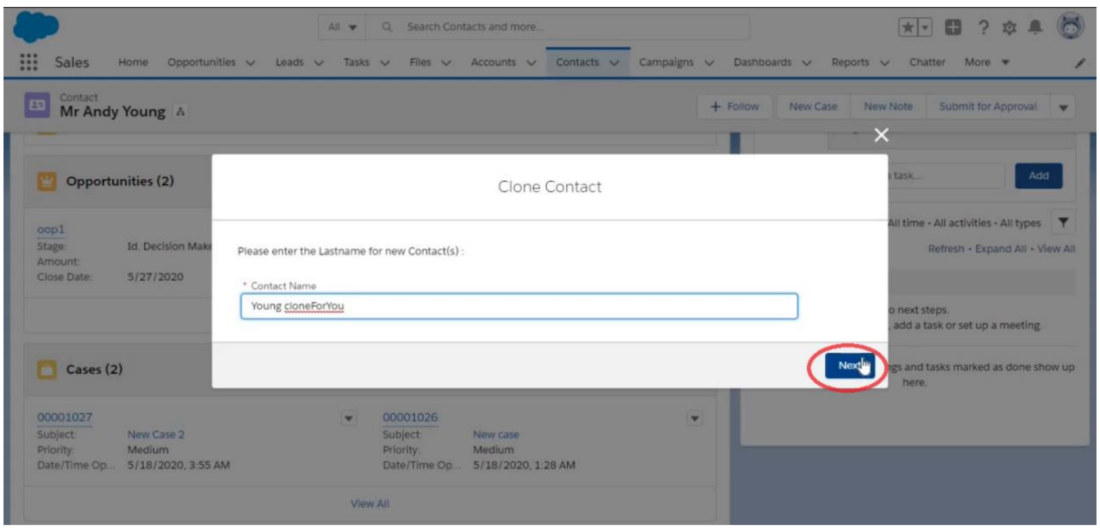




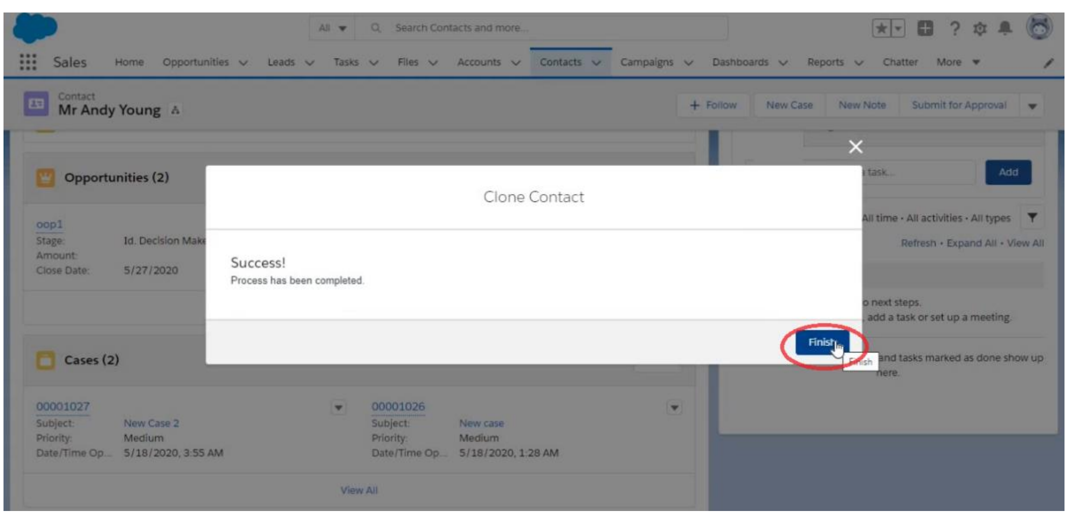
- Click on Contact Clone in quick Actions. It will launch the flow.







- Once the process is finished, success window appears.



- Go back to Contacts and you will see the new cloned Contacts along with its related lists.