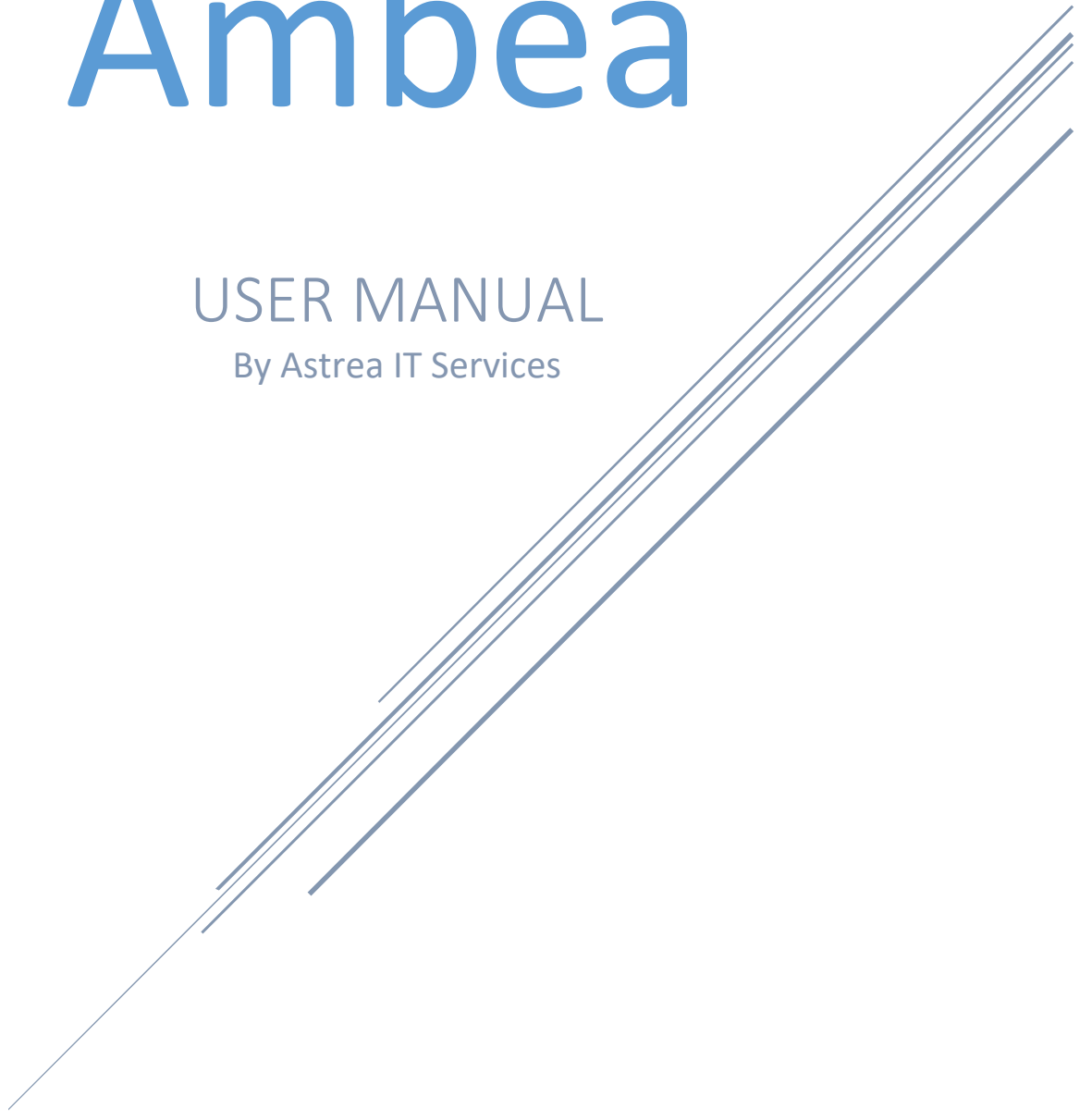


Ambea

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:

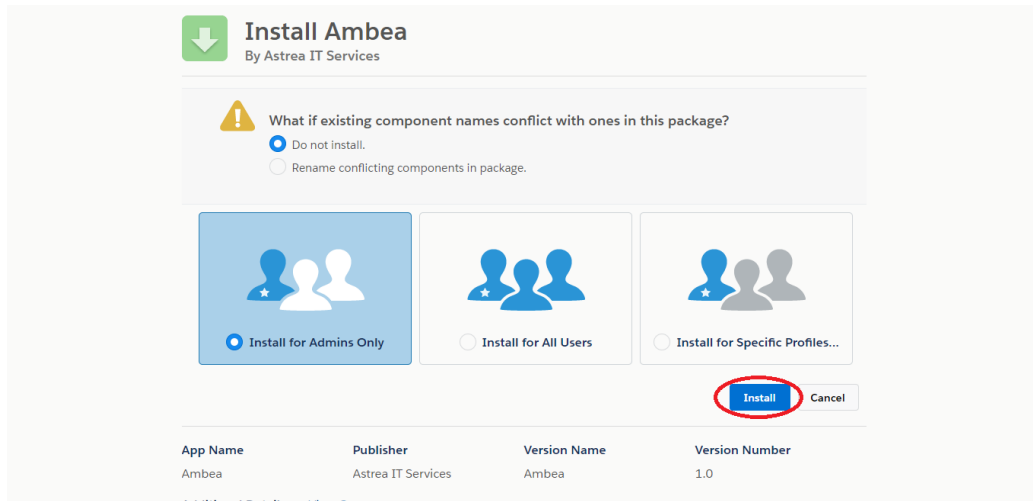
- via AppExchange
- install directly in your org using the package link

Download from AppExchange:

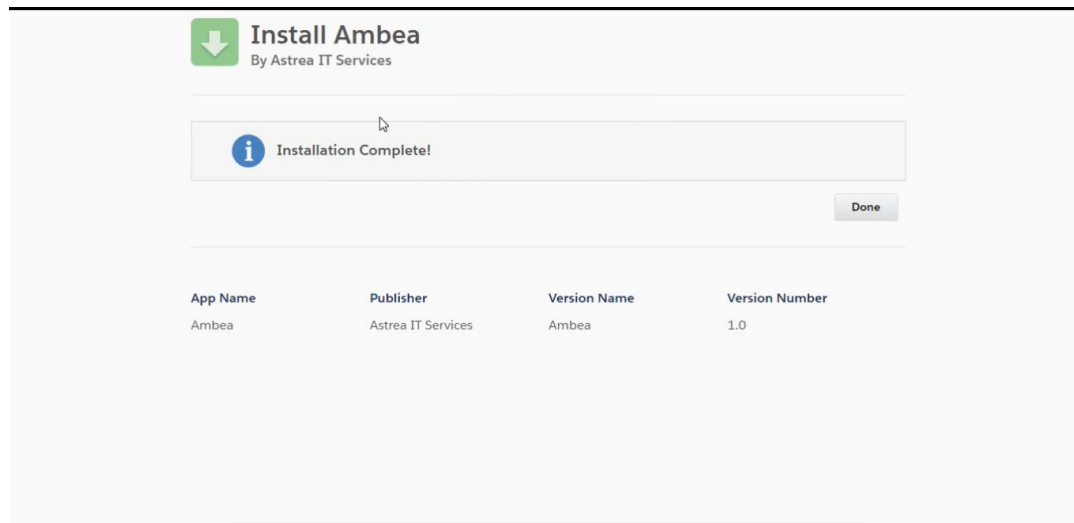
- Click on the AppExchange link in your organization or directly go to <https://appexchange.salesforce.com/>
- Browse the AppExchange site to find the "Ambea" application.
- Click 'Get It Now' from the application information page.
- You can choose the accessibility of the app for All users or for Only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



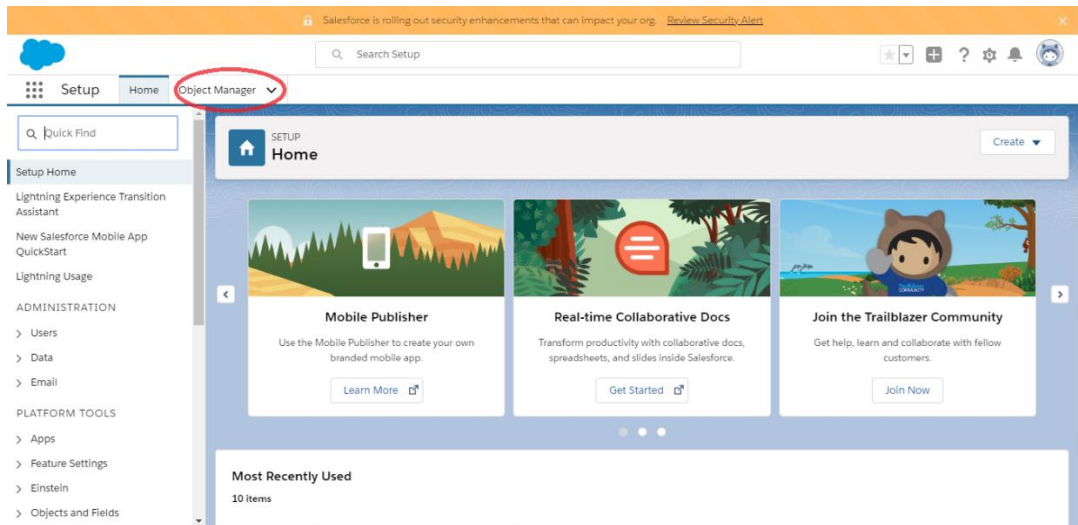
- Click 'Install' and you will be redirected to this window:



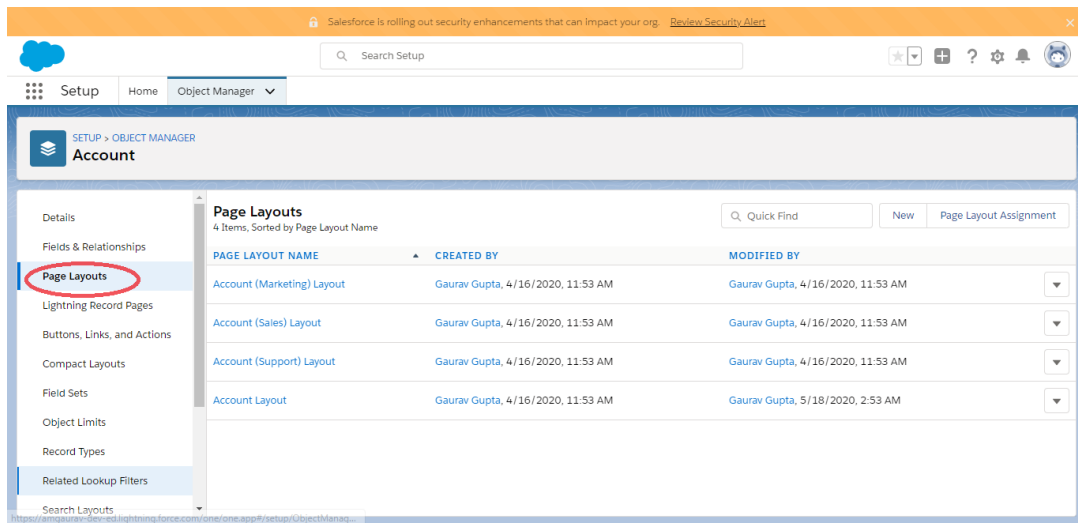
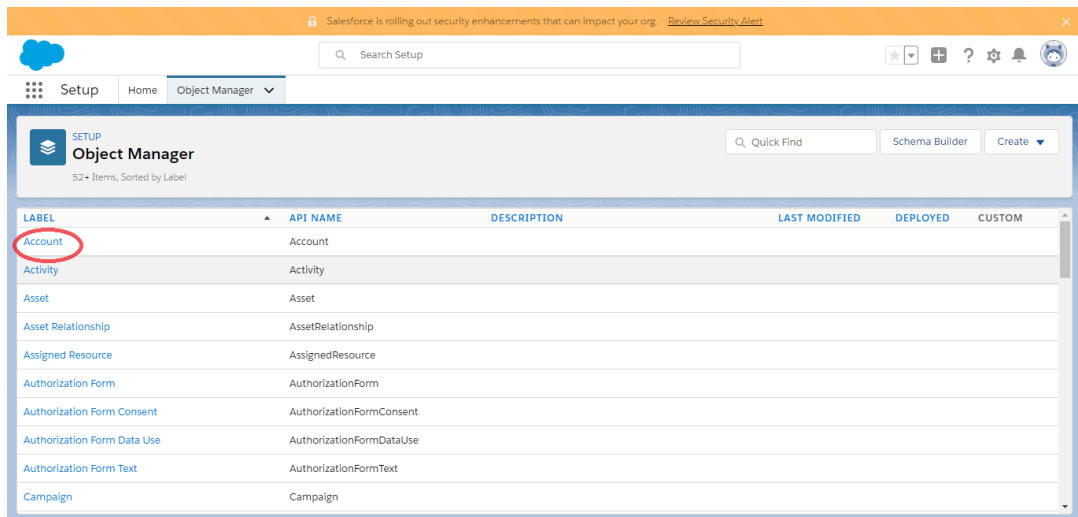
- Click 'Done' to finish the installation process.

Add the Astrea Clone Quick Action in Account Page Layout:

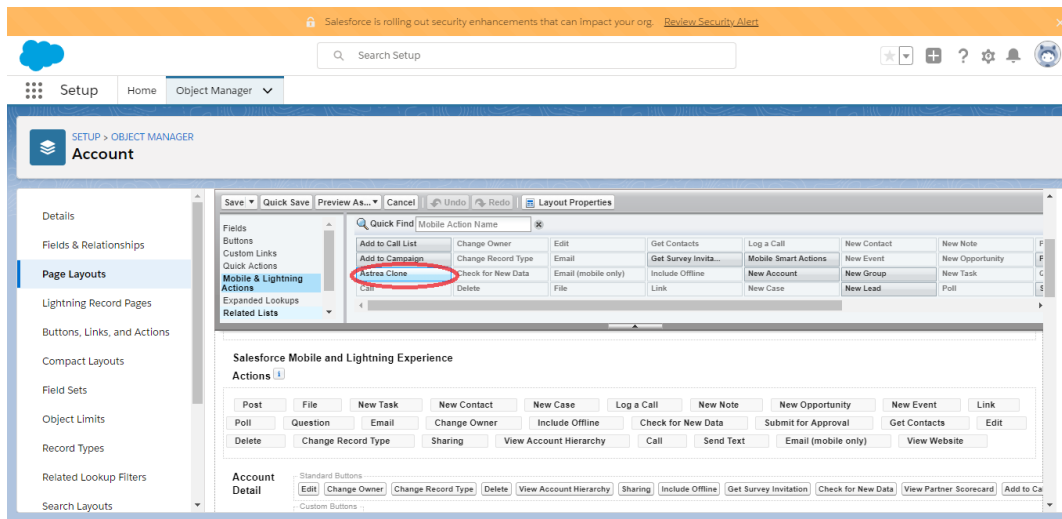
- Click on the Object Manager on Setup page.



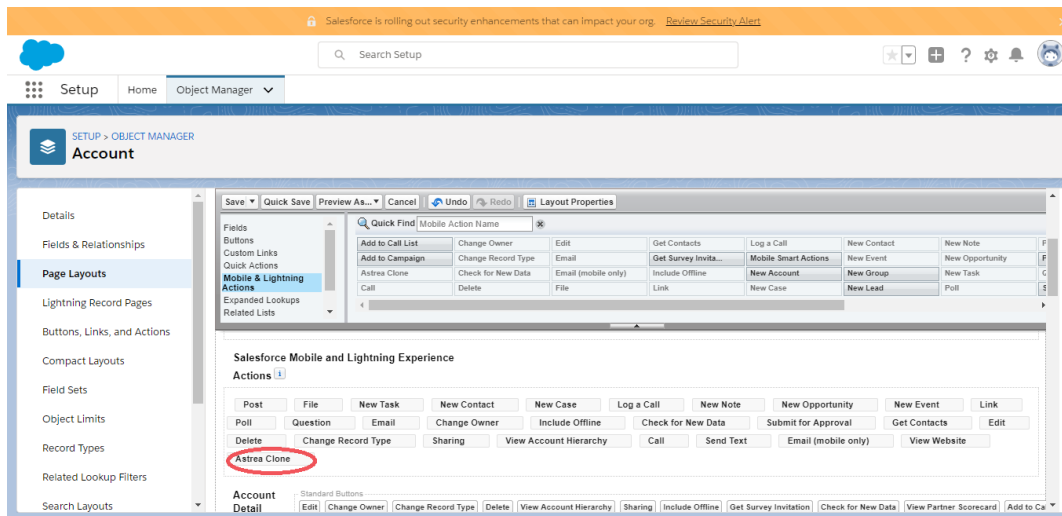
- Select Account and go to the Page Layout.



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



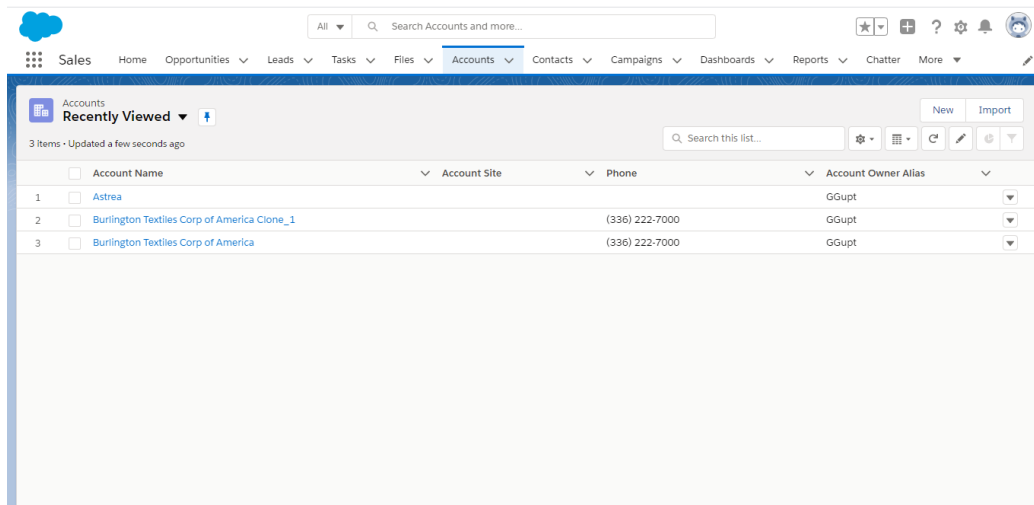
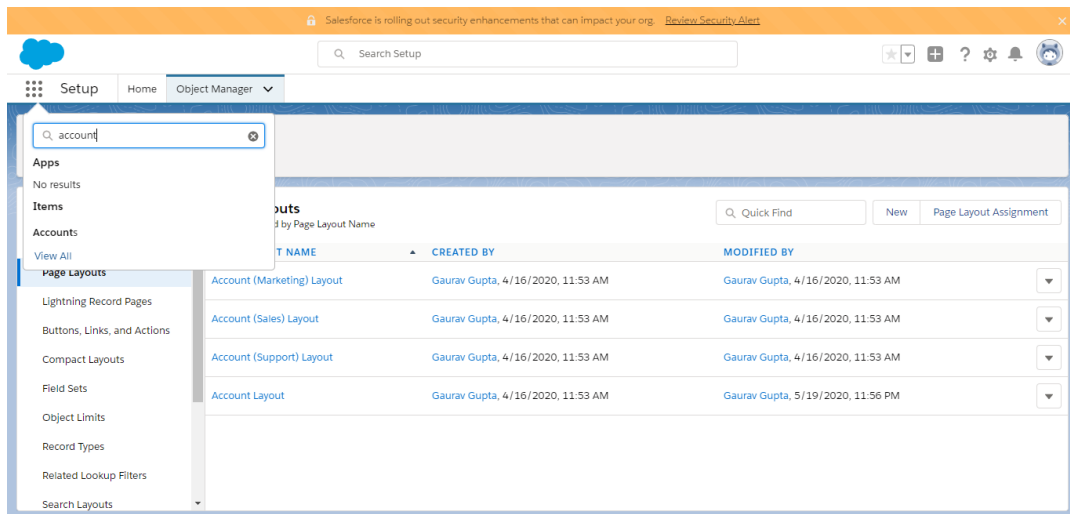
- Drag the **Astrea Clone** action down to the Salesforce Mobile and Lightning Experience Actions section.



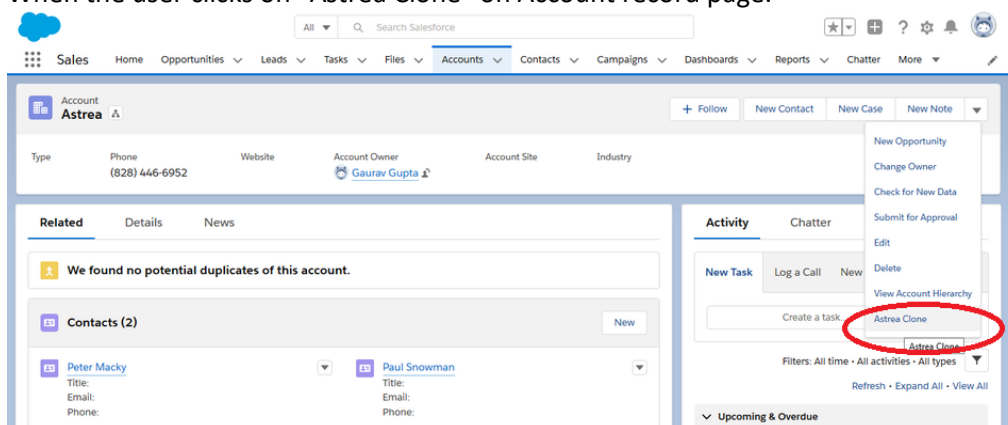
- Click 'Save' to save the layout.

How Ambea Works:

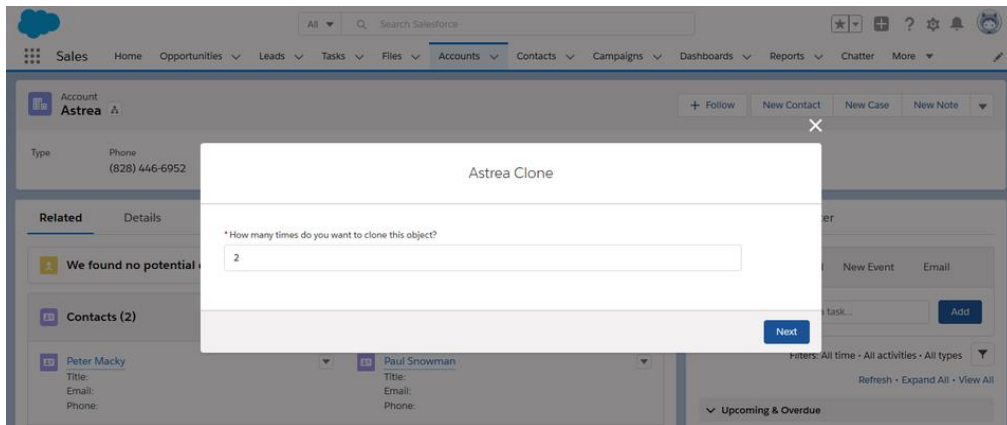
- Type Accounts in App Launcher, then select **Accounts** to go the Account list view. Open an account record.



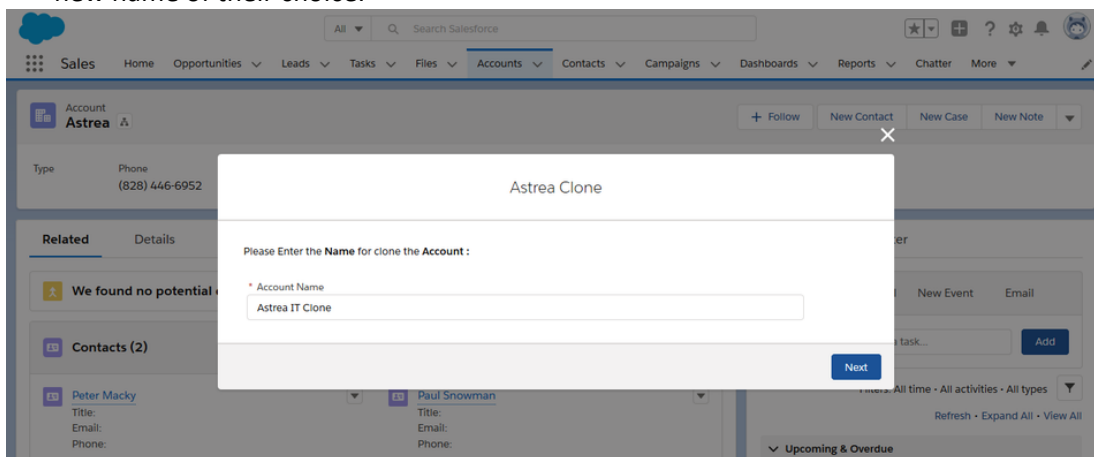
- When the user clicks on “Astrea Clone” on Account record page.



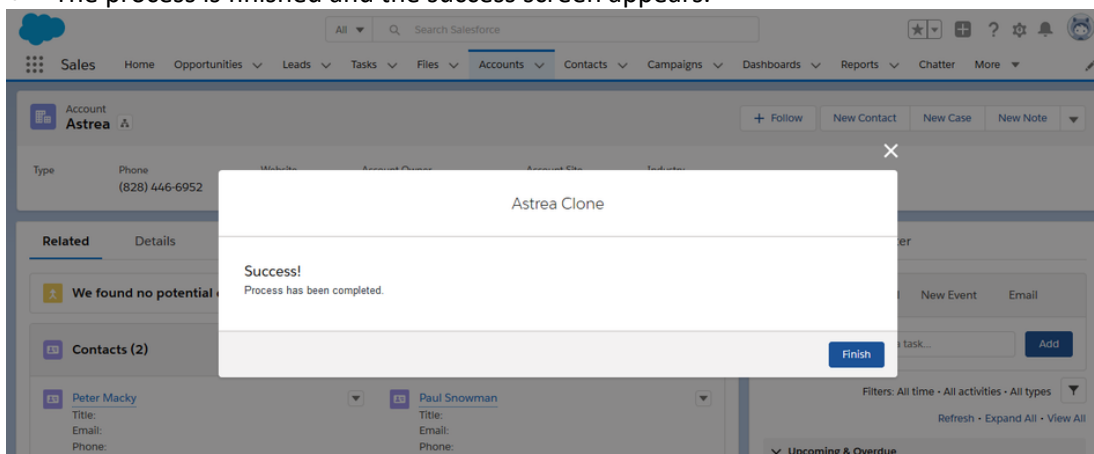
- Flow starts, A screen appears and asked user for enter the number of clones.



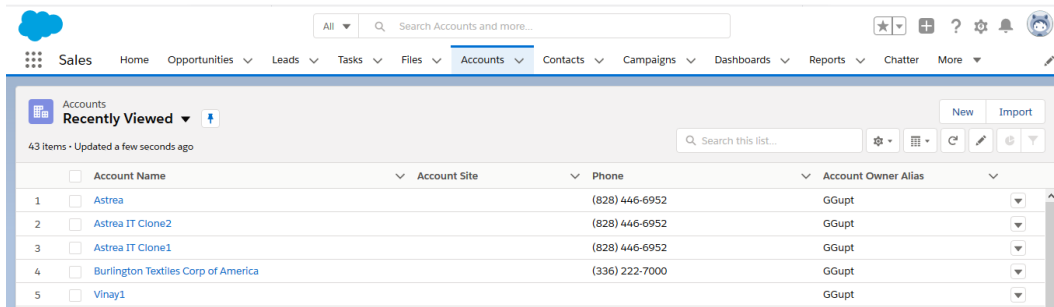
- After click on 'Next', a screen appears with default account name. The user can set provide the new name of their choice.



- The process is finished and the success screen appears.



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



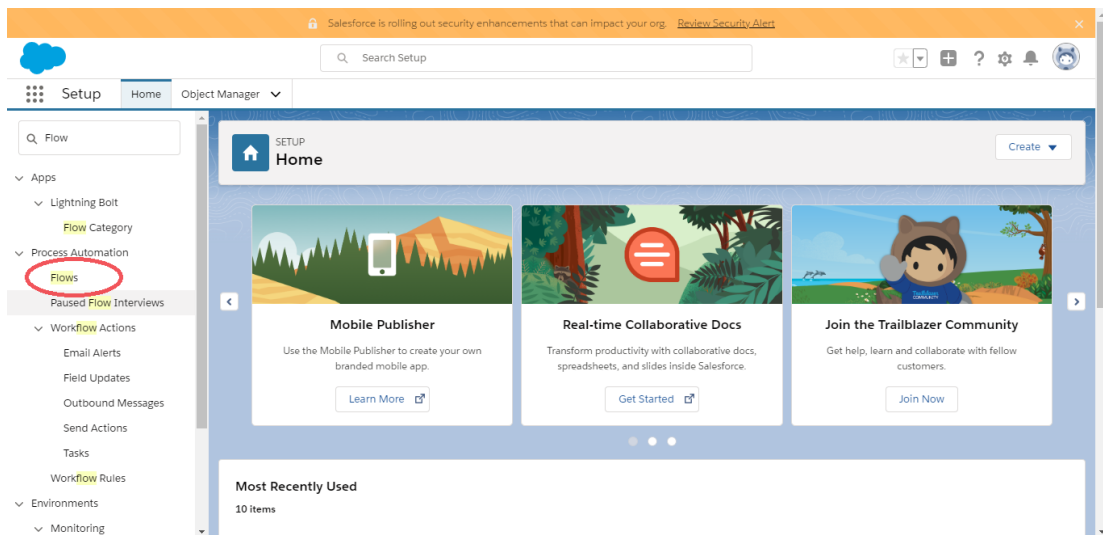
The screenshot shows the Salesforce 'Accounts' page. At the top, there's a navigation bar with tabs like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts (selected), Contacts, Campaigns, Dashboards, Reports, Chatter, and More. Below the navigation bar, the 'Accounts' section is active, displaying 'Recently Viewed' accounts. A search bar and 'New'/'Import' buttons are visible. The table lists 5 accounts with columns for Account Name, Account Site, Phone, and Account Owner Alias.

	Account Name	Account Site	Phone	Account Owner Alias
1	Astrea		(828) 446-6952	GGupt
2	Astrea IT Clone2		(828) 446-6952	GGupt
3	Astrea IT Clone1		(828) 446-6952	GGupt
4	Burlington Textiles Corp of America		(336) 222-7000	GGupt
5	Vinay1			GGupt

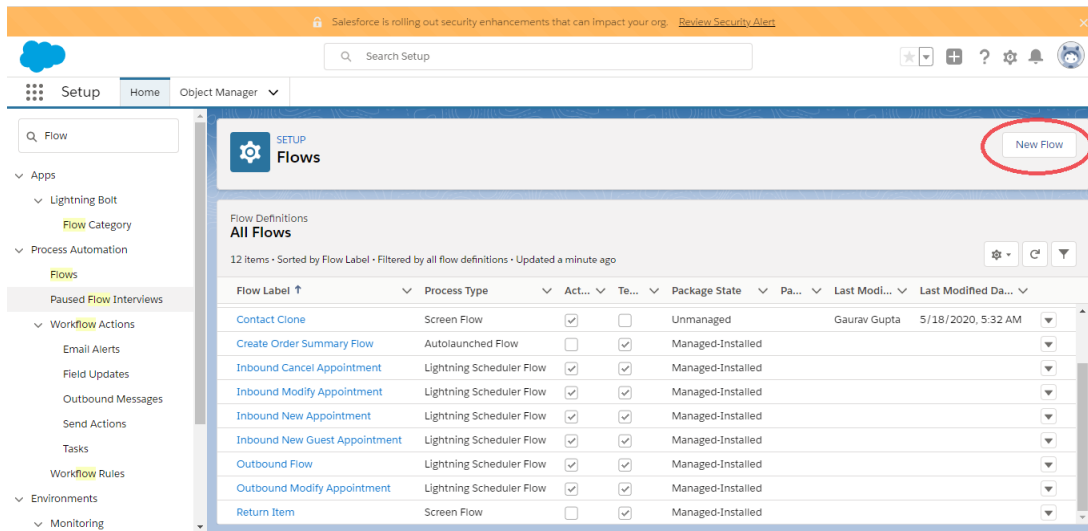
Customize the Ambea to clone other objects:

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

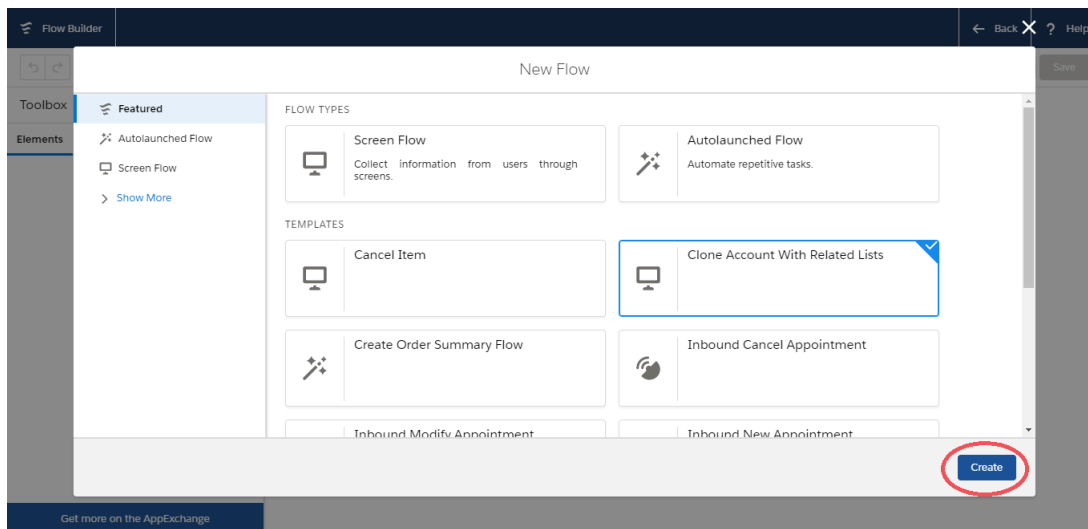
- Type 'flow' in Quick find box on Setup page and select 'Flows' under Process Automation.



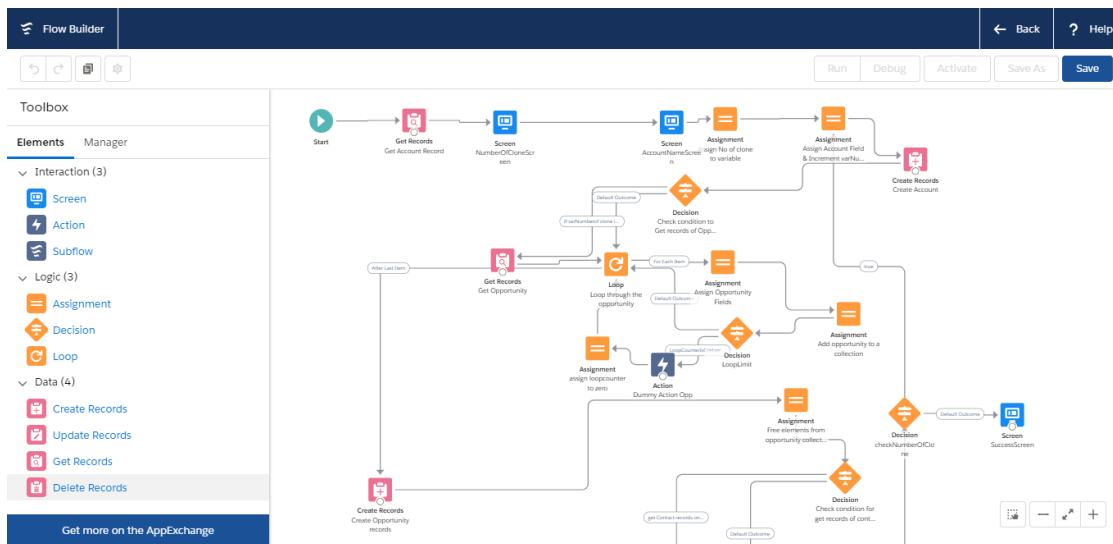
- Now you will be redirected to the Flows then click on New Flow to create new Flow.



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

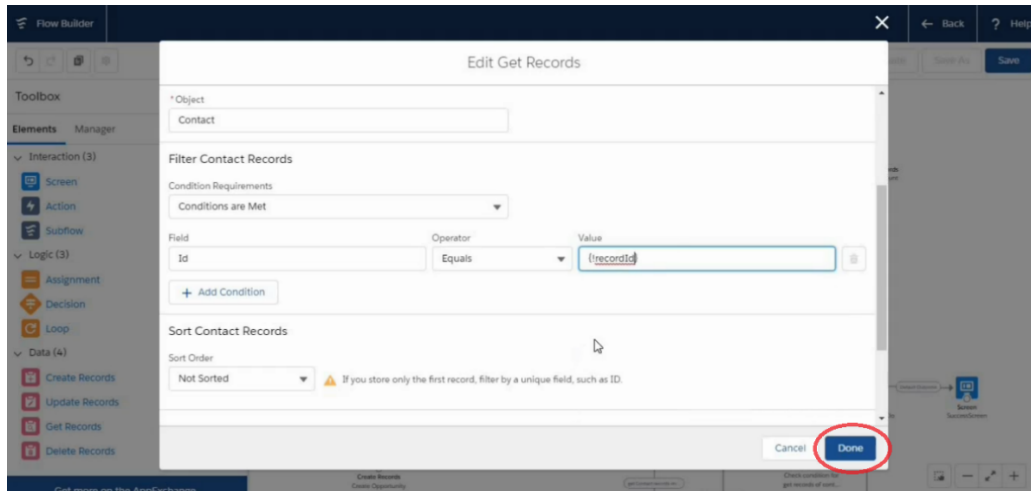


- Now you will see the entire flow 'Clone Account with Related Lists' of Ambea App.

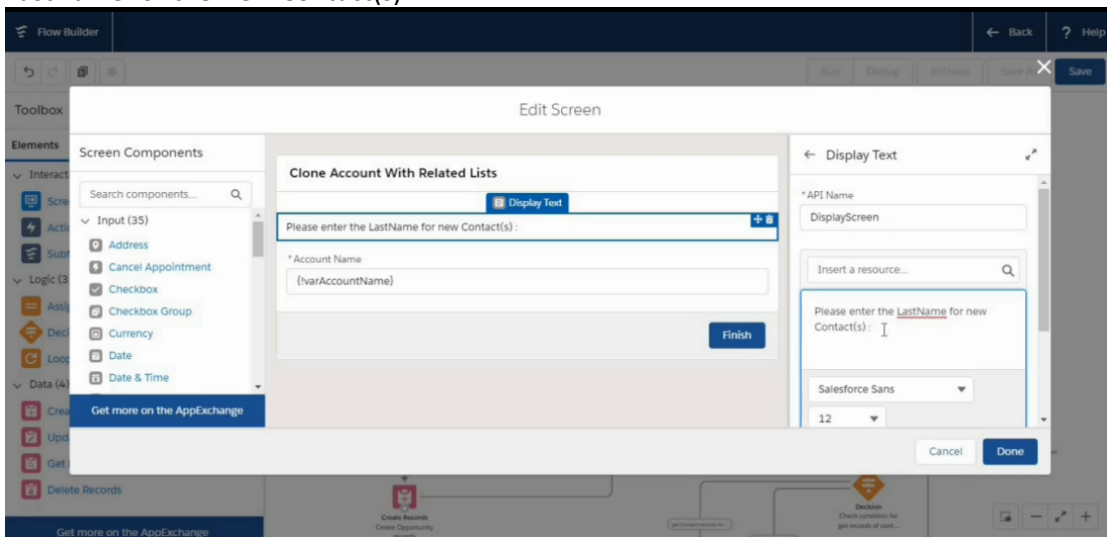


- Click 'Get Records'- **Get Account Record** then change its label as well as API name to **Get Contact Record**.

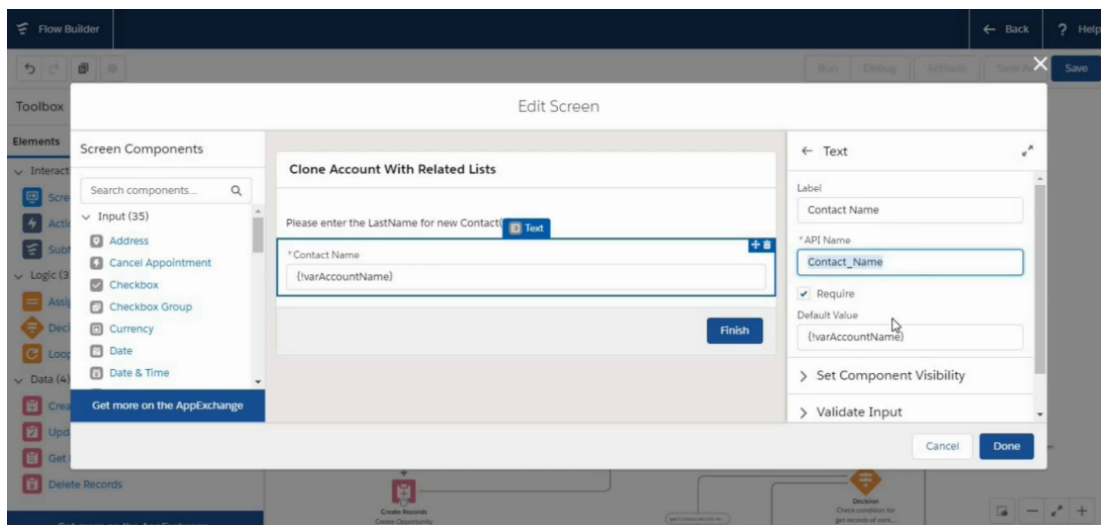
- Change Object Account to Contact and add a condition to fetch record Id Equals {!recordId} and click done.



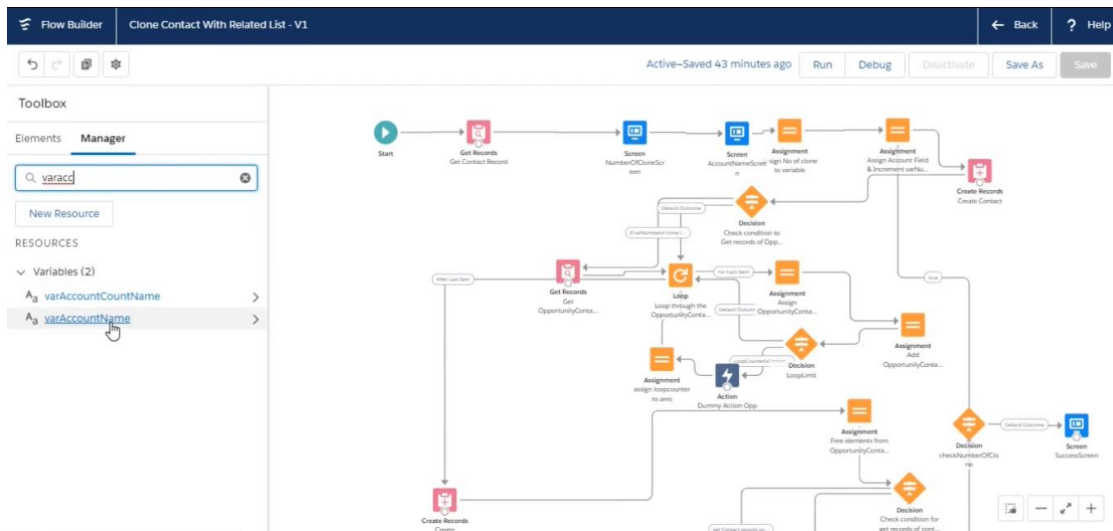
- Now click on Screen – **AccountNameScreen** and change the display text – ‘Please Enter the LastName for the New Contact(s)’.



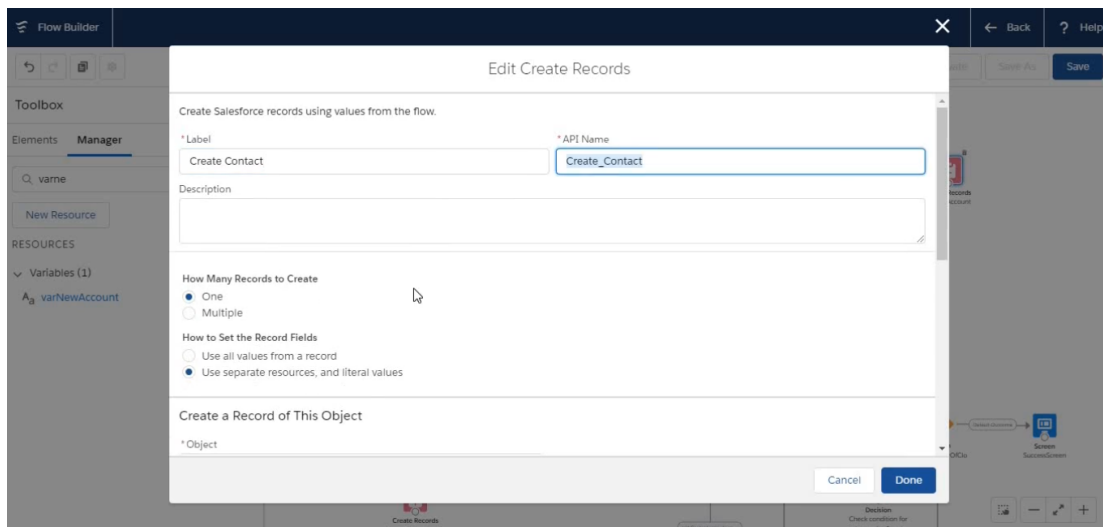
- Click on ‘Text’ and change its label Contact Name and API name and click on done.



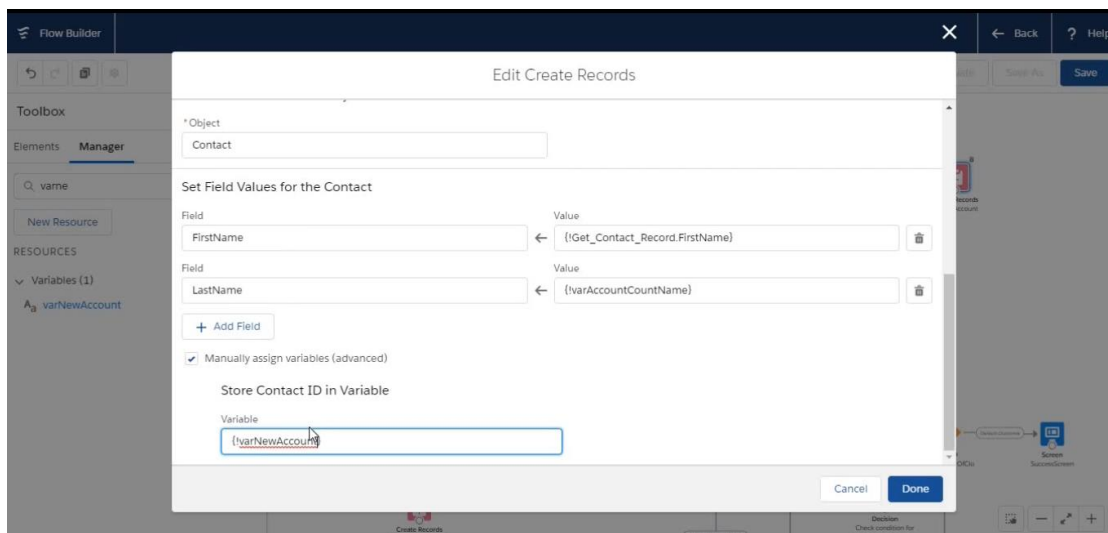
- Click on Manager and search varAccountName and click on the varAccountName and change its default value to {!Get_Contact_Record.LastName}, and press Done.



- 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**.

Flow Builder

✕ ← Back ? Help

Toolbox

Elements Manager

Q vame

New Resource

RESOURCES

Variables (1)

varNewAccount

Find Salesforce records and store their field values in flow variables.

* Label: Get OpportunityContactRole

* API Name: Get_OpportunityContactRole

Description

Get Records of This Object

* Object: Opportunity

Filter Opportunity Records

Condition Requirements: Conditions are Met

Field Operator Value

Cancel Done

- 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.

Flow Builder

✕ ← Back ? Help

Toolbox

Elements Manager

Q vame

New Resource

RESOURCES

Variables (1)

varNewAccount

Get Records of This Object

* Object: Opportunity Contact Role

Filter Opportunity Contact Role Records

Condition Requirements: Conditions are Met

Field Operator Value

ContactId Equals {!recordId}

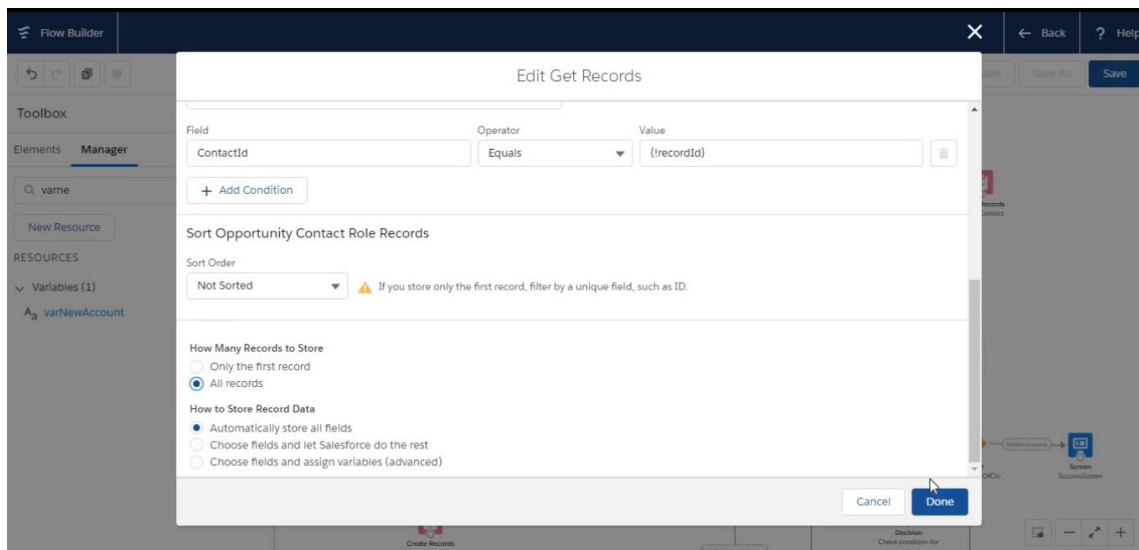
+ Add Condition

Sort Opportunity Contact Role Records

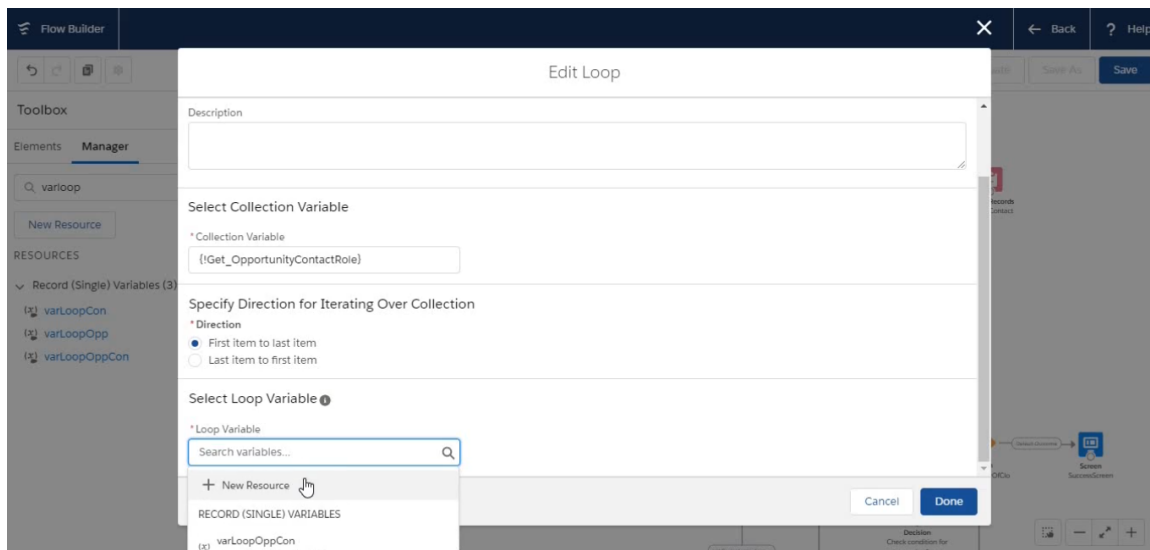
Sort Order: Not Sorted

⚠ If you store only the first record, filter by a unique field, such as ID.

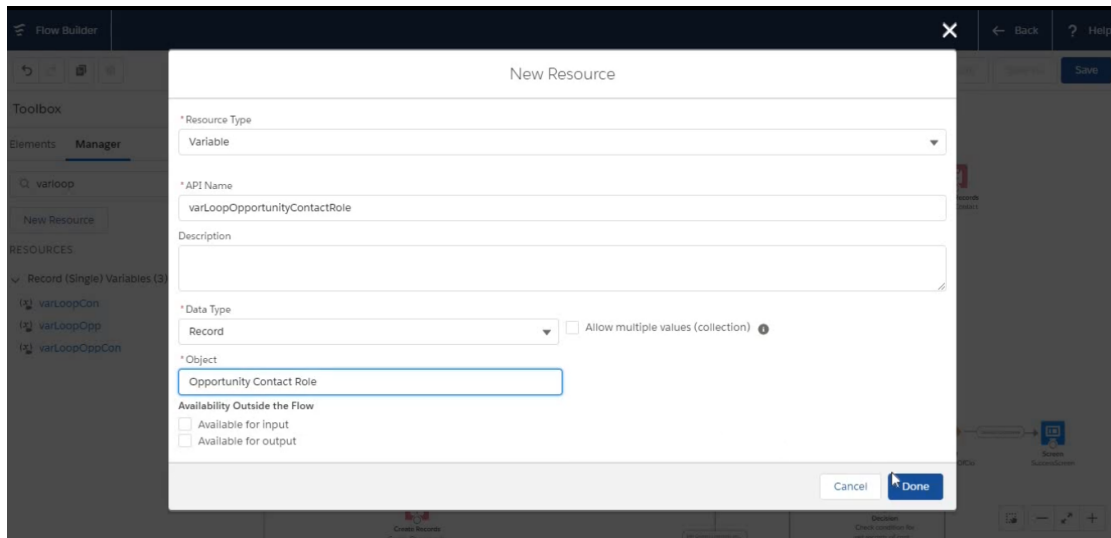
Cancel Done



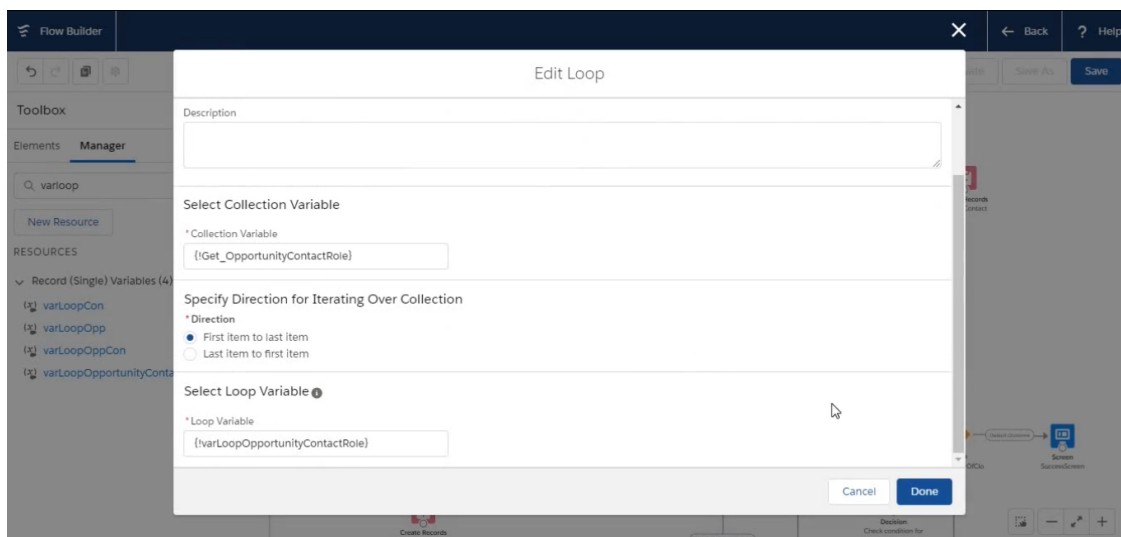
- Change the Loop – **Loop through the OpportunityContactRole**, **Select Loop Variable** delete the existing and click on New Resource.



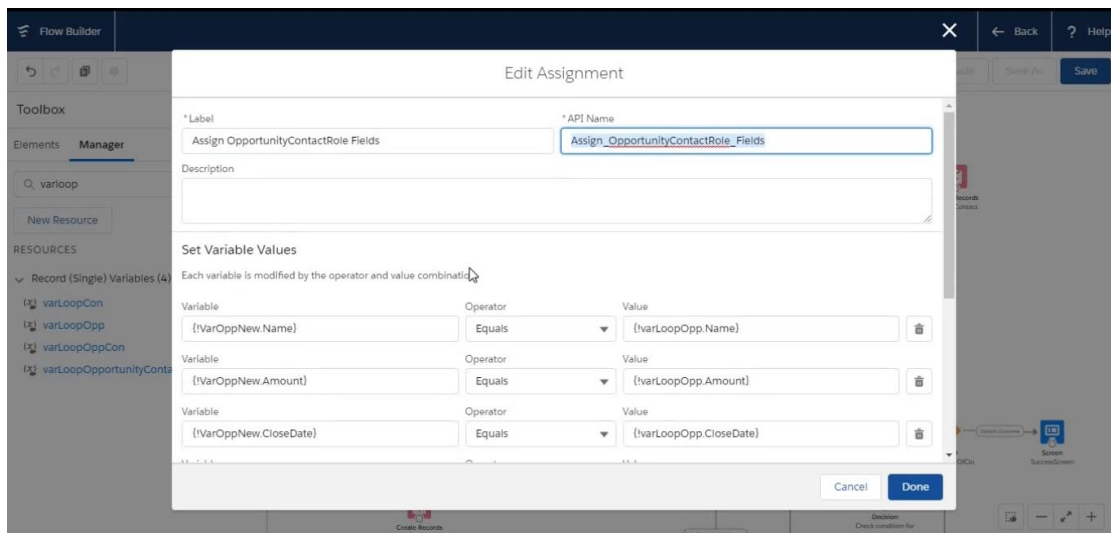
- A popup screen appears. Select Resource Type as Variable, choose API name as varLoopOppportunityContactRole, Data Type as Record and search object OpportunityContactRole and select it and press Done.



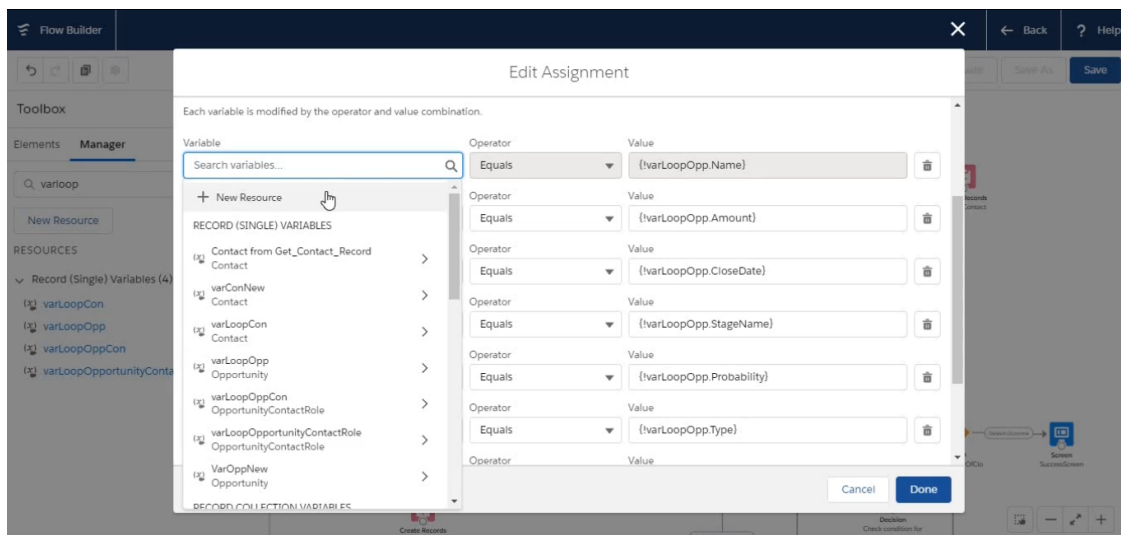
- Edit Loop window appears. In Select Loop Variable select varLoopOpportunityContactRole and press Done.



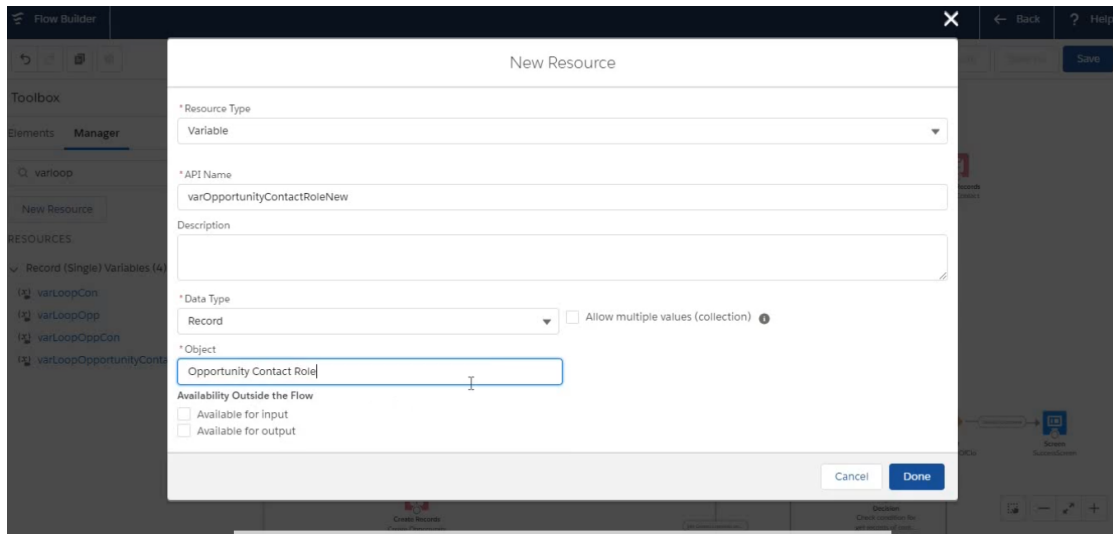
- Click on Assignment – **Assign Opportunity Fields** and change its label to **Assign OpportunityContactRole Fields**.



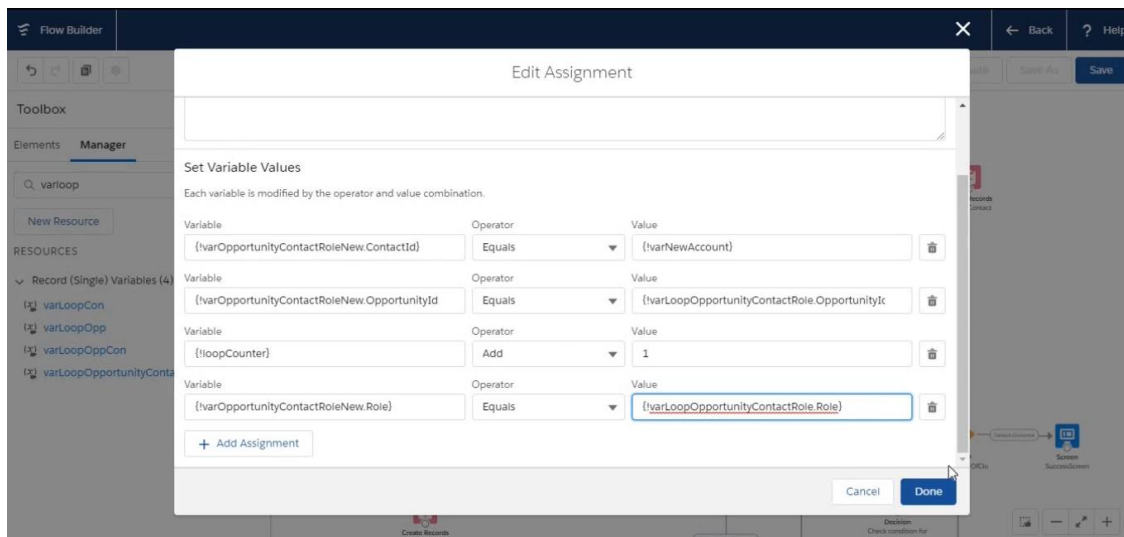
- In Set Variables Values section click on variable delete the existing and click on New Resource.



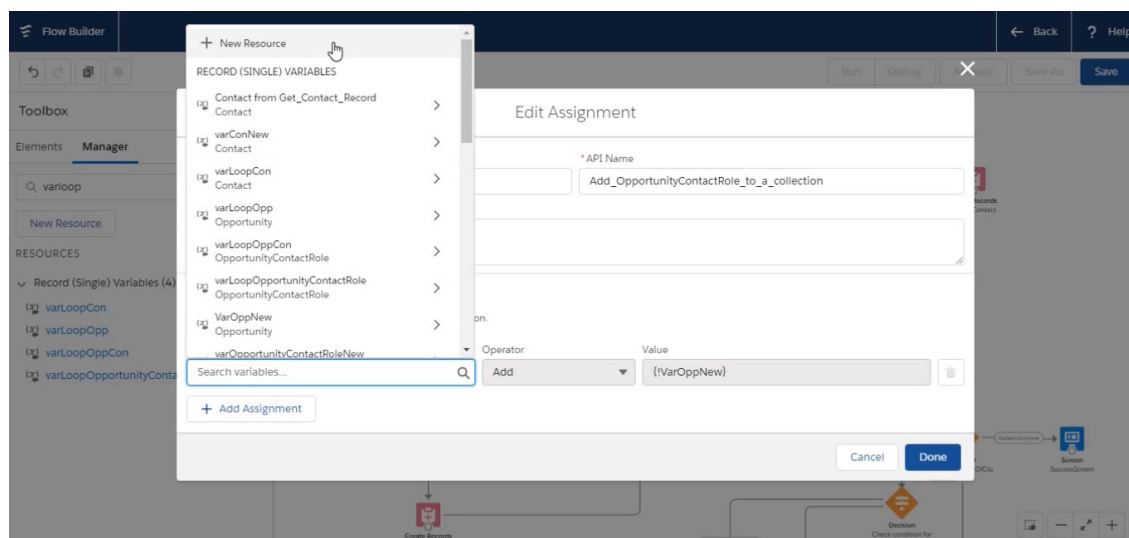
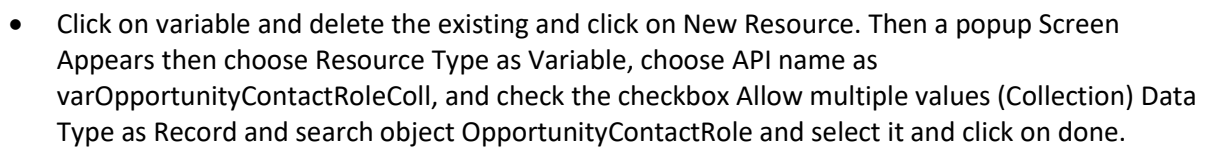
- A popup Screen appears. Select Resource Type as Variable, choose API name as varOppportunityContactRoleNew, Data Type as Record and search object OpportunityContactRole and select it and press Done.

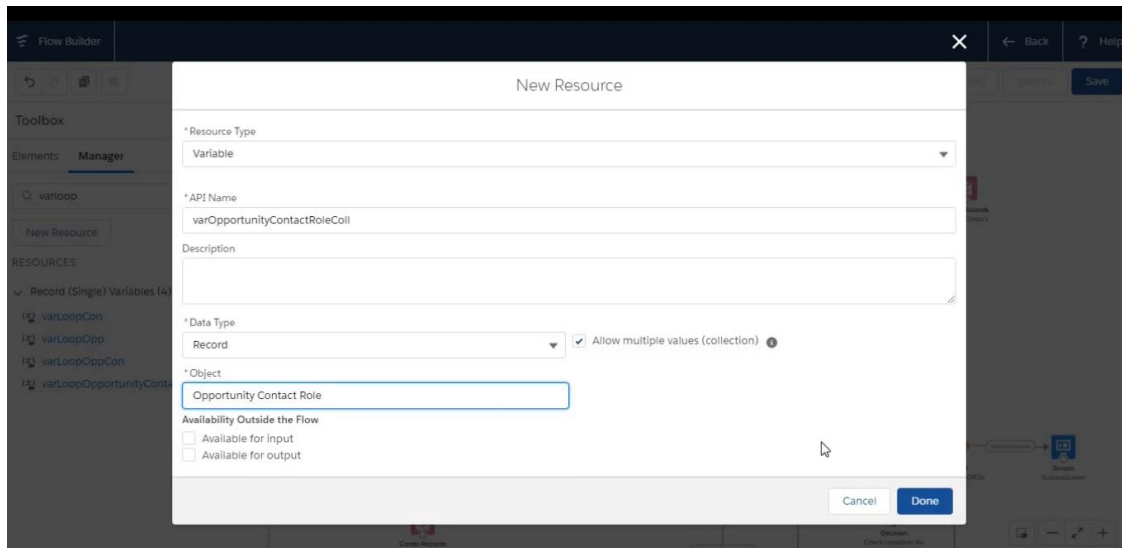


- Set the values of variables choose `{!varOpportunityContactRoleNew.ContactId}`, equal , `{!varNewAccount}`. To add a field choose `{!varOpportunityContactRoleNew.OpportunityId}` equal , `{!varLoopOpportunityContactRole.OpportunityId}` and you can add more fields as per your choice, and press Done.

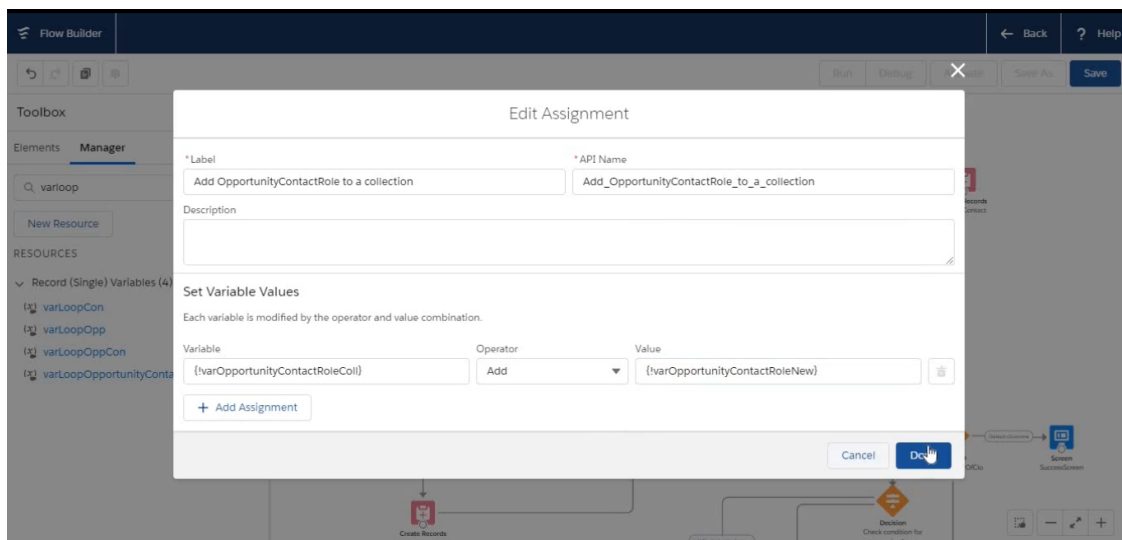


- Click Assignment – **Add Opportunity to a collection** and change its label to **Add OpportunityContactRole to a Collection**.

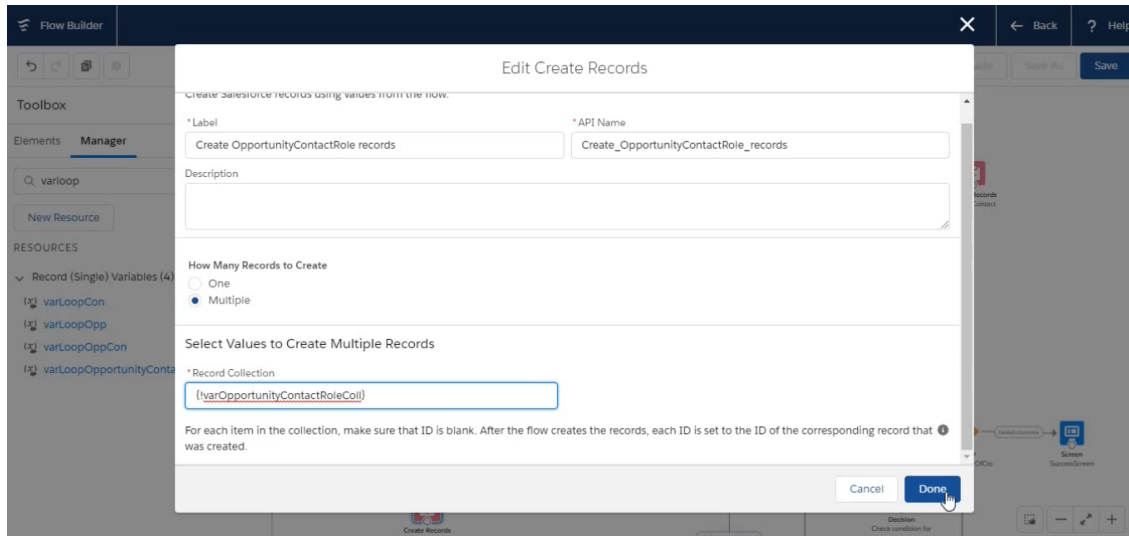




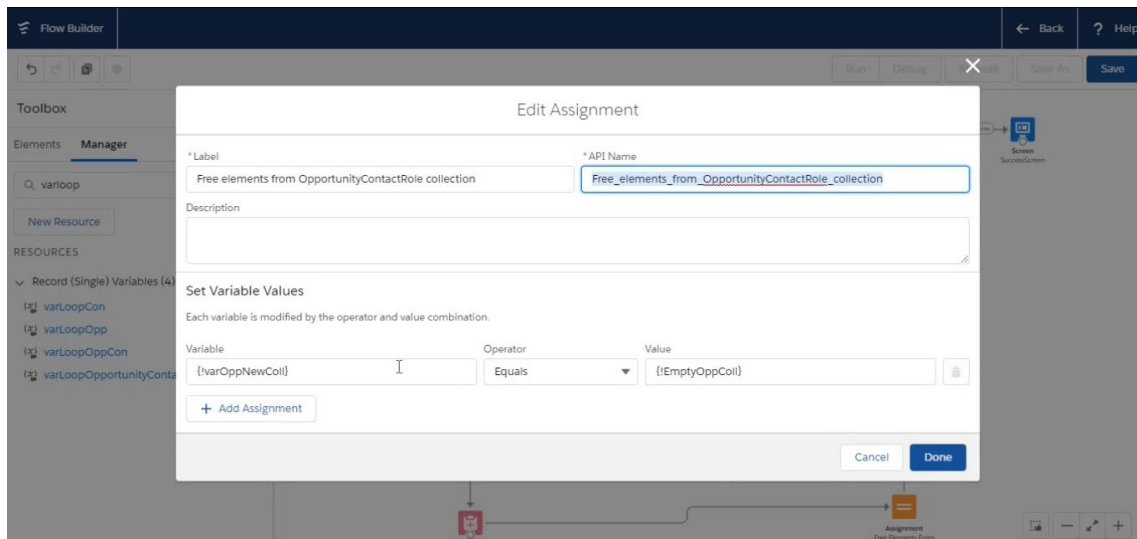
- Now choose the variable {!varOpportunityContactRoleColl} and select operator 'Add' and choose value {!varOpportunityContactRoleNew} and click on done.



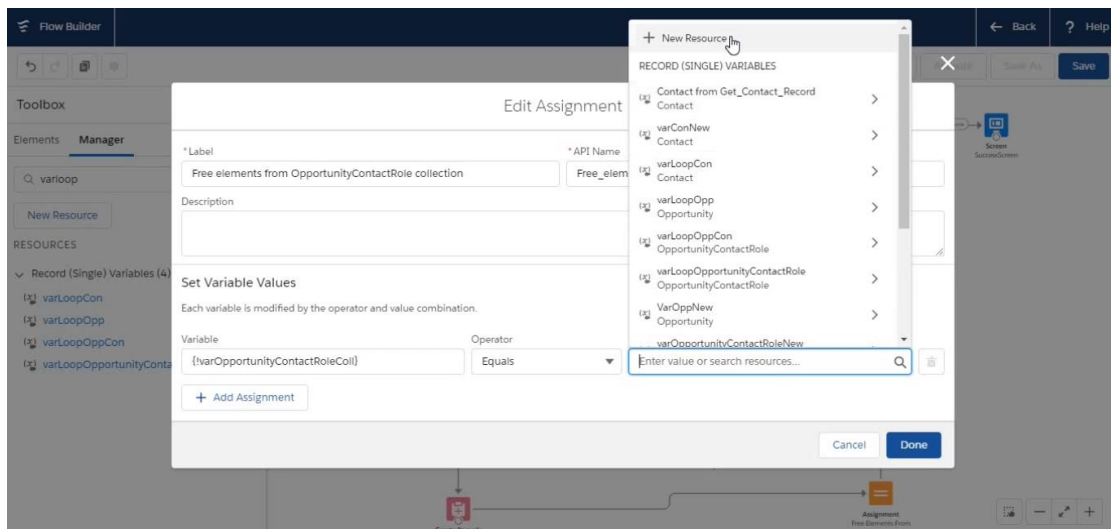
- Click on Create Records – **Create Opportunity** and change its label to **Create OpportunityContactRoles Records** and Multiple to create multiple records and Select values to create Multiple Records record collection as {!varOpportunityContactRoleColl} and click Done.



- 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**.

Flow Builder

Toolbox

Elements Manager

Find Salesforce records and store their field values in flow variables.

* Label: Get Cases

* API Name: Get_Cases

Description

Get Records of This Object

* Object: Contact

Filter Contact Records

Condition Requirements: Conditions are Met

Field: Operator: Value:

Cancel Done

- 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.

Flow Builder

Toolbox

Elements Manager

Get Records of This Object

* Object: Case

Filter Case Records

Condition Requirements: Conditions are Met

Field: ContactId Operator: Equals Value: {!recordId}

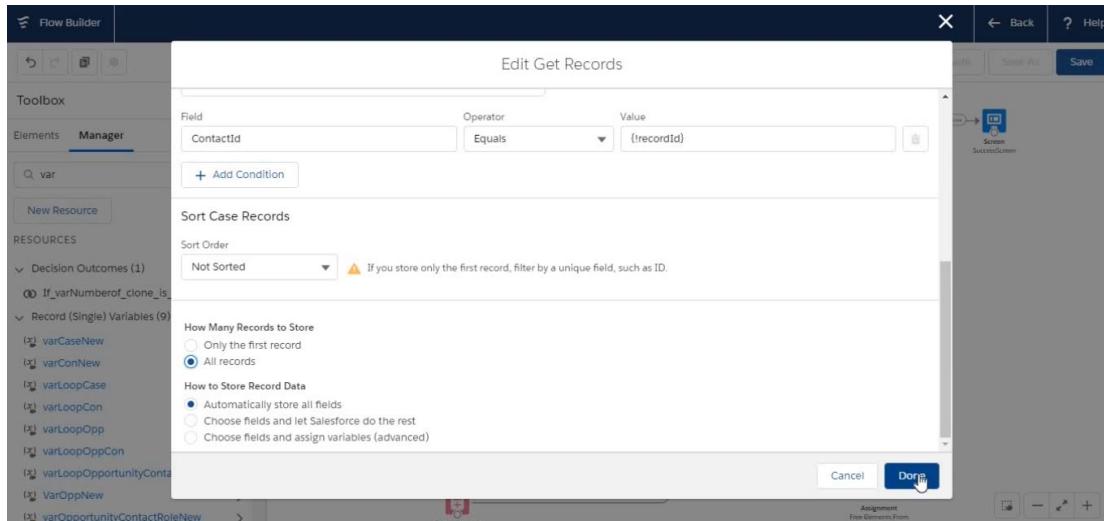
+ Add Condition

Sort Case Records

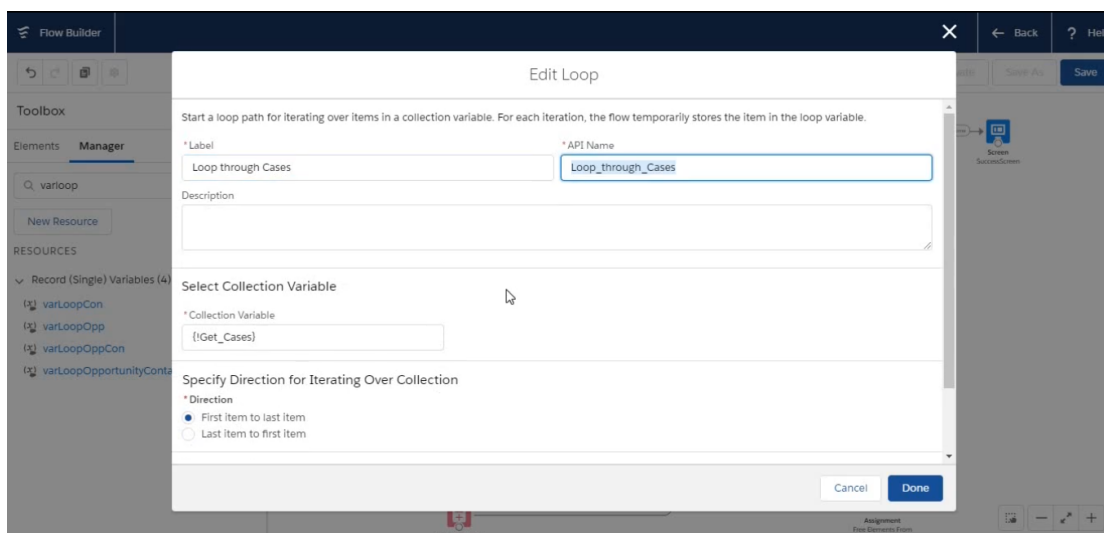
Sort Order: Not Sorted

⚠ If you store only the first record, filter by a unique field, such as ID.

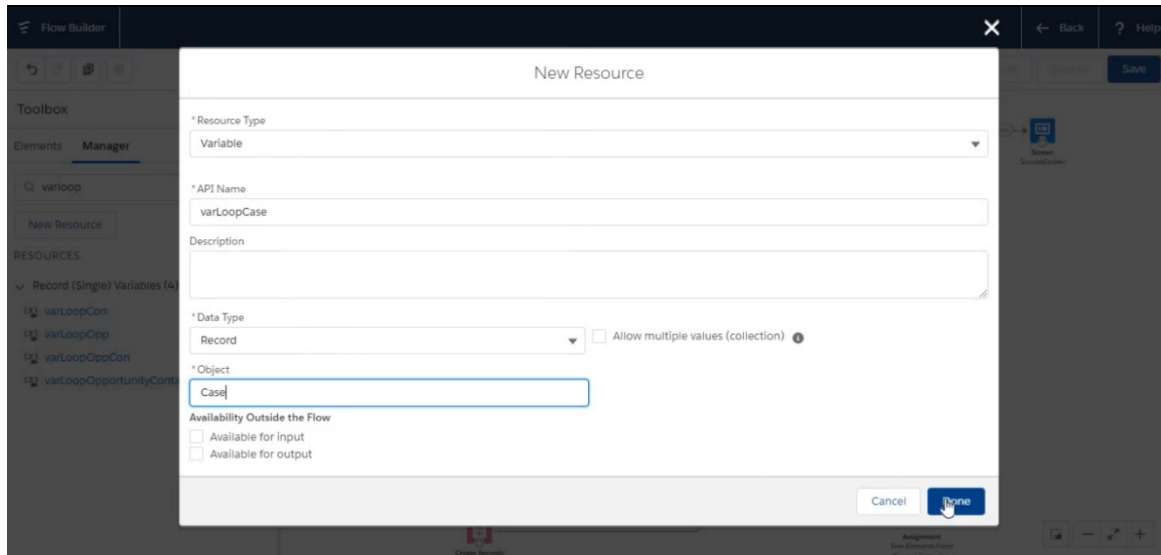
Cancel Done



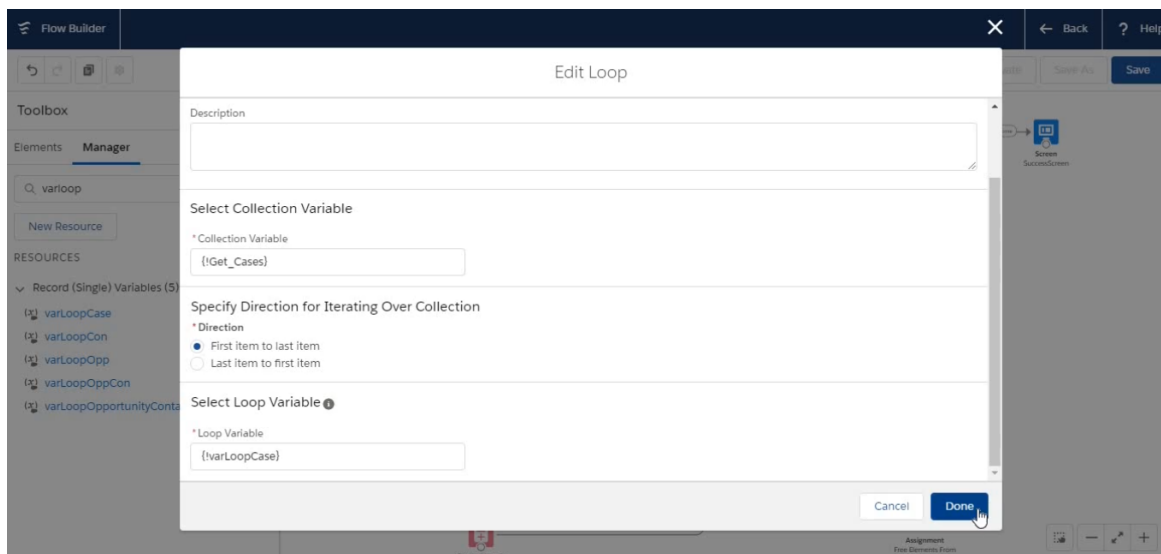
- Modify the Loop – **Loop through Contacts** then change the label **Loop through Cases**.



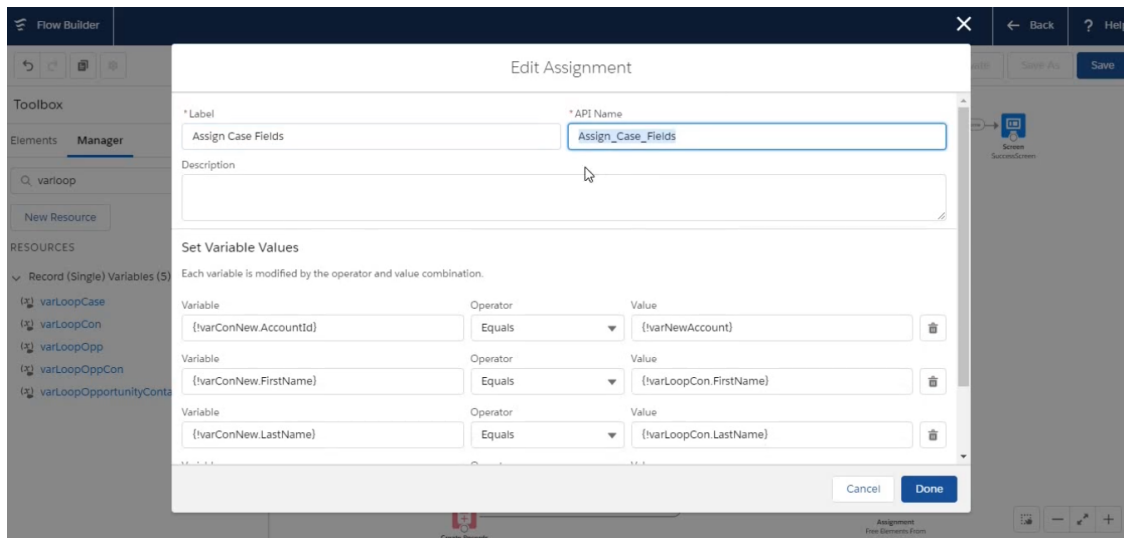
- Select Loop Variable and delete existing and click on New Resource, Then a popup Screen Appears then choose Resource Type as Variable, choose API name as varLoopCase, Data Type as Record and search object Case and select it and click Done.



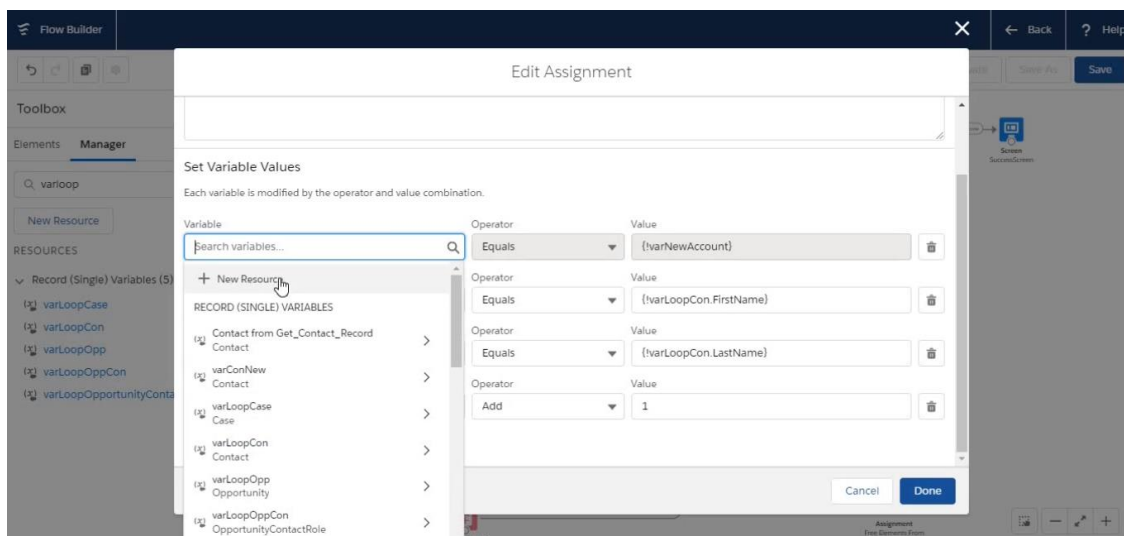
- Then in Edit Loop window click Done.



- 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.



New Resource

* Resource Type
Variable

* API Name
varCaseNew

Description

* Data Type
Record ☐ Allow multiple values (collection)

* Object
Case

Availability Outside the Flow
☐ Available for input
☐ Available for output

Cancel Done

- In variable choose `{!varCaseNew.ContactId}`, 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.

Edit Assignment

Set Variable Values

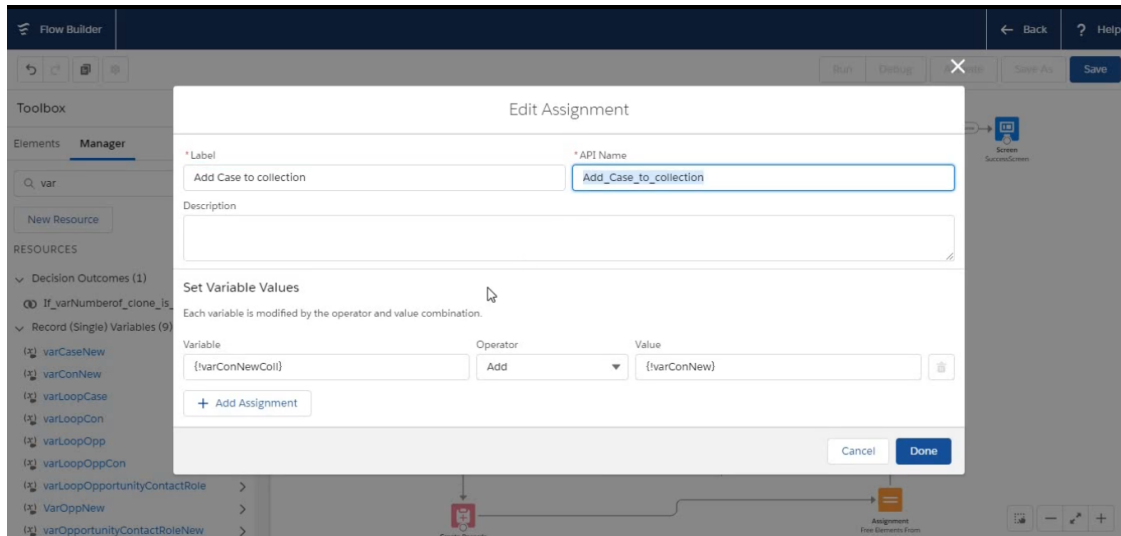
Each variable is modified by the operator and value combination.

Variable	Operator	Value
<code>{!varCaseNew.ContactId}</code>	Equals	<code>{!varNewAccount}</code>
<code>{!varCaseNew.Subject}</code>	Equals	<code>{!varLoopCase.Subject}</code>
<code>{!varCaseNew.Description}</code>	Equals	<code>{!varLoopCase.Description}</code>
<code>{!conLoopCounter}</code>	Add	1

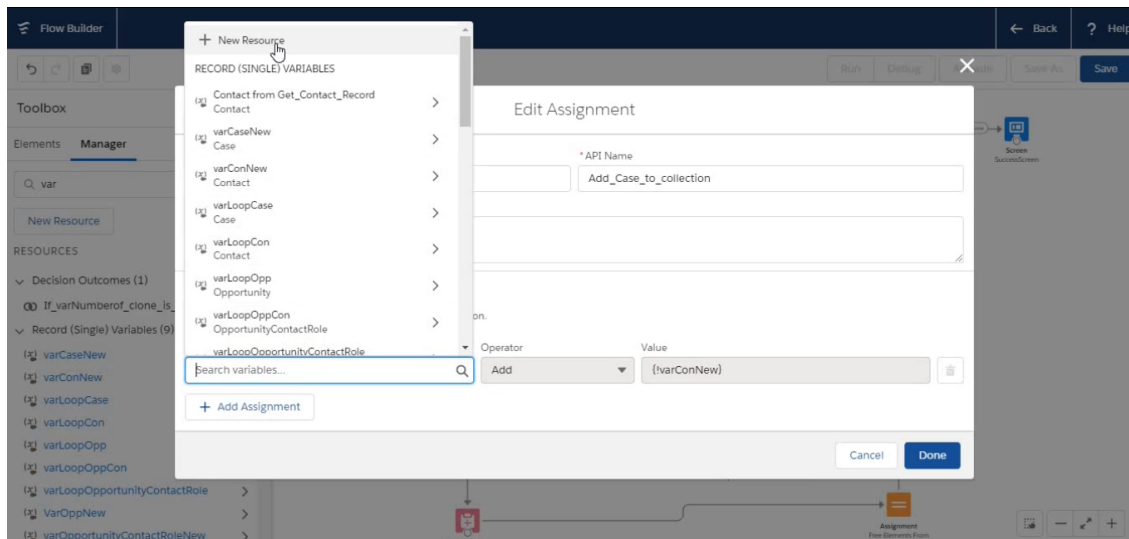
+ Add Assignment

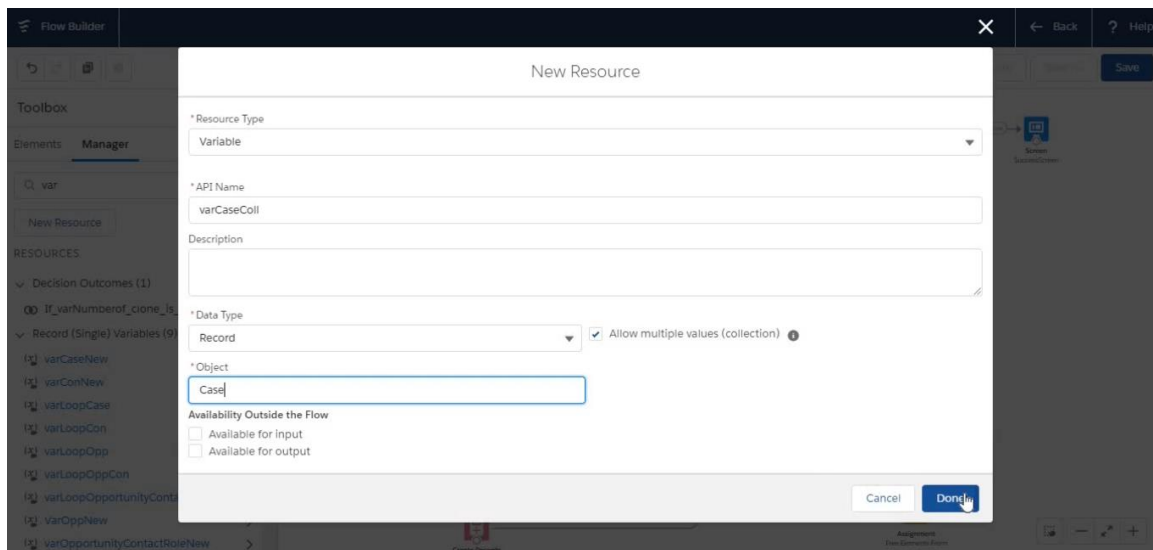
Cancel Done

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

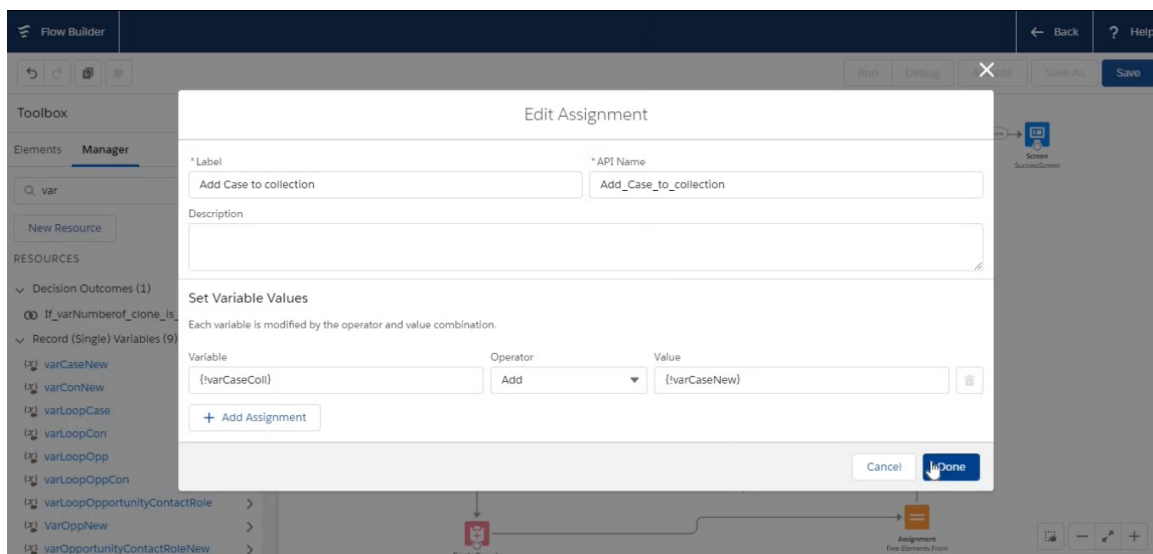


- Click on set Variables values and delete the existing variable and click on New Resource. A popup screen appears, choose Resource Type as Variable, choose API name as varCaseColl, and check the Allow Multiple Values(Collection), Data Type as Record and search object Case and select it and click Done.

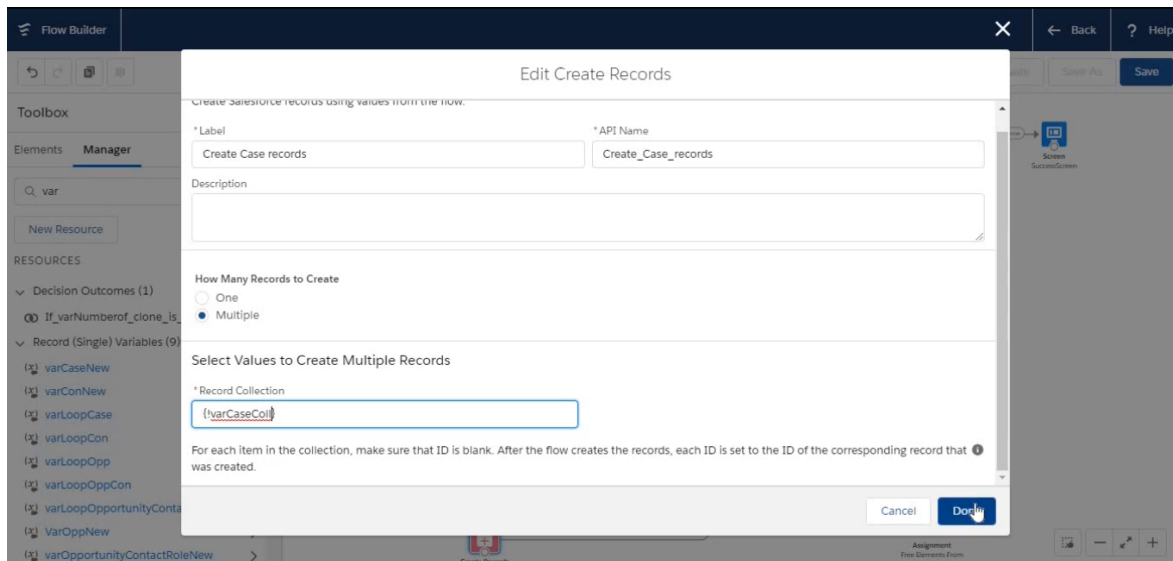




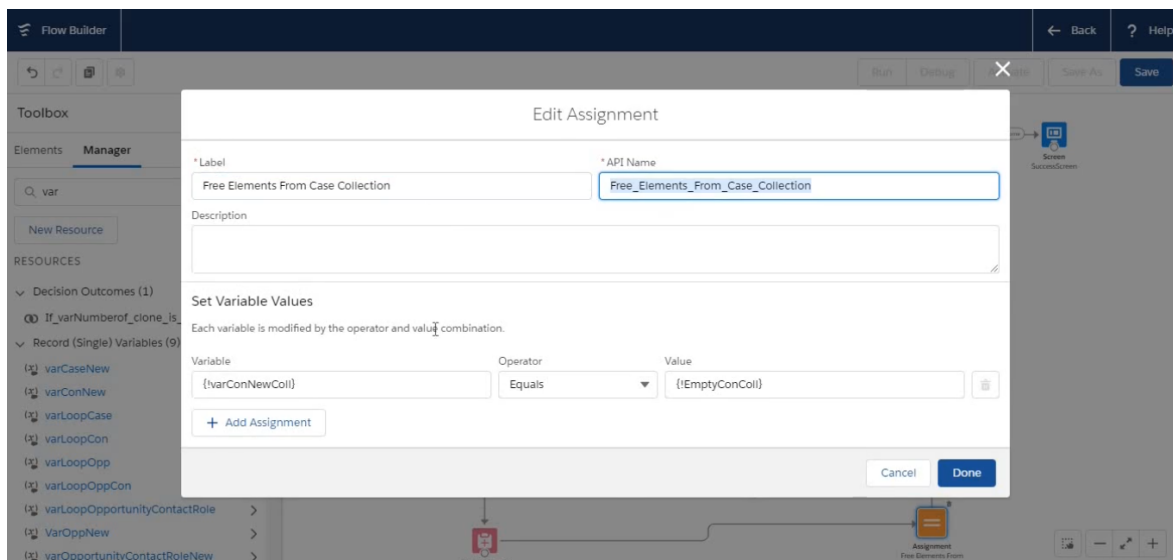
- Put `{!varCaseColl}` in variable, `{!varCaseNew }` in value Field & operator should be Add, click done.



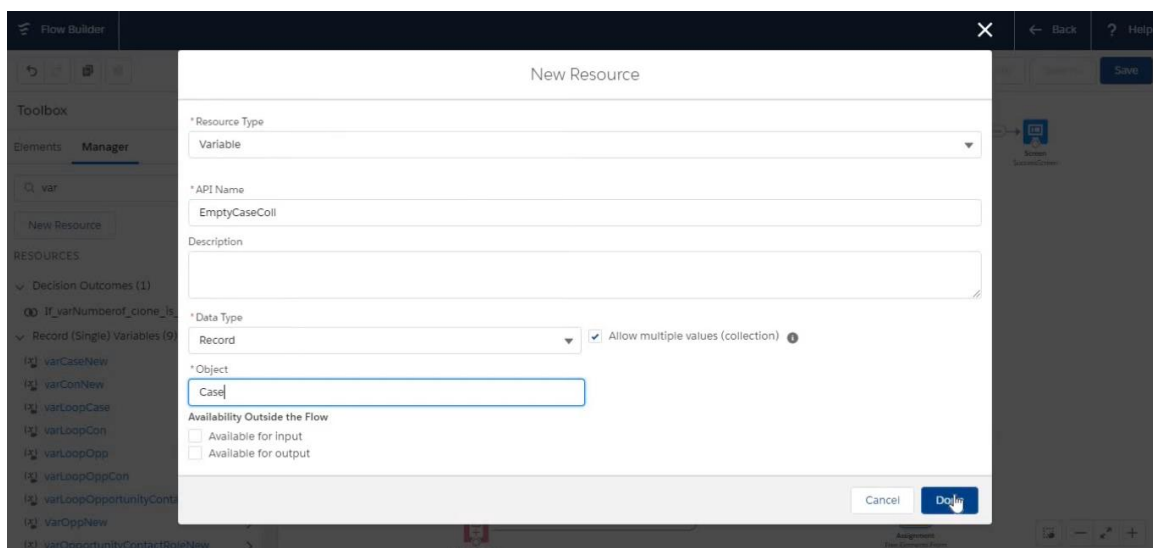
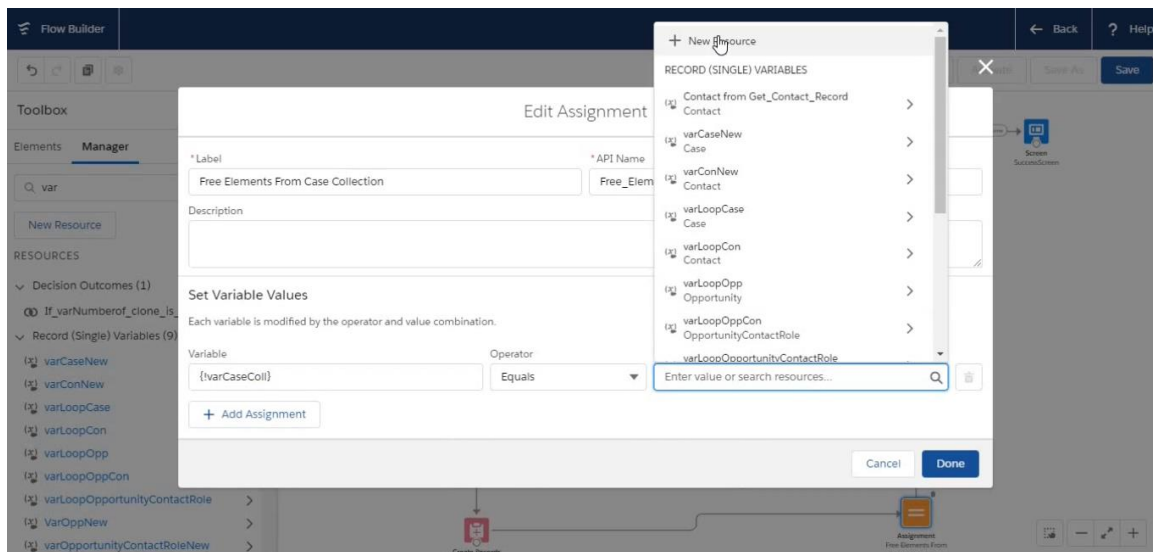
- Click on Create Records - **Create Contacts Records** and change its label to **Create Case Records** and choose record collection – `{!varCaseColl}` and Done.



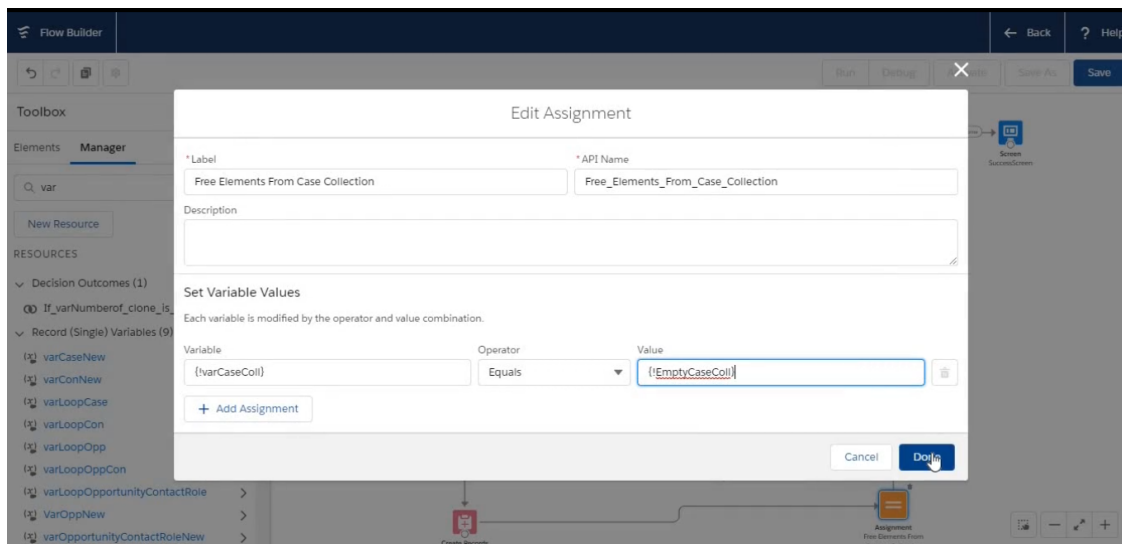
- Click on Assignment - **Free Elements from Contact Collection** and change its label to **Free Elements from Case Collection**.



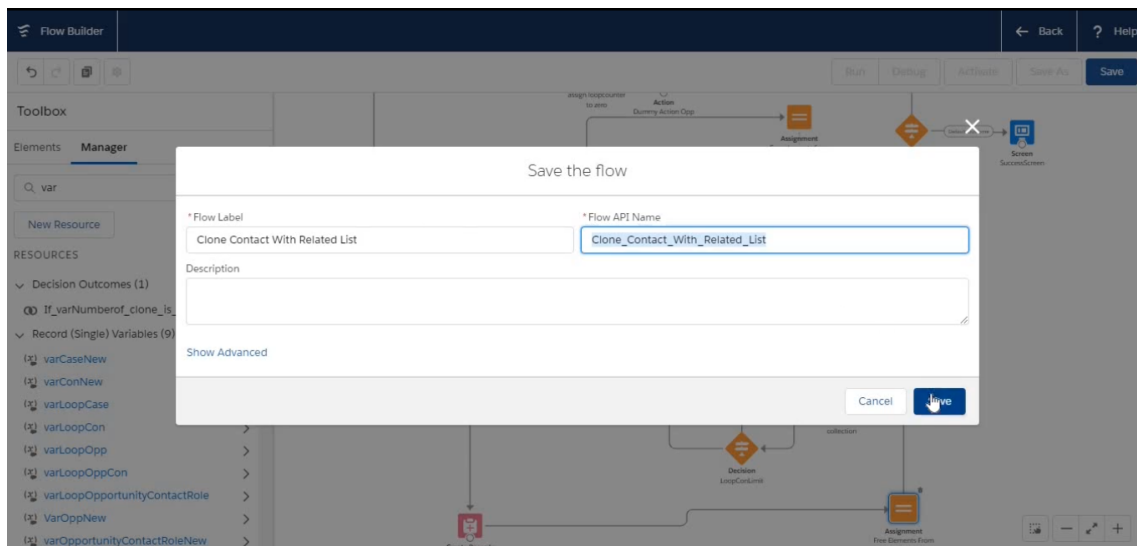
- Click on variable and delete the existing and select `{!varCaseColl}` and for its values section delete the existing and click on new Resource. Then a popup Screen Appears then choose Resource Type as Variable, choose API name as EmptyCaseColl, and check the Allow Multiple Values(Collection), Data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



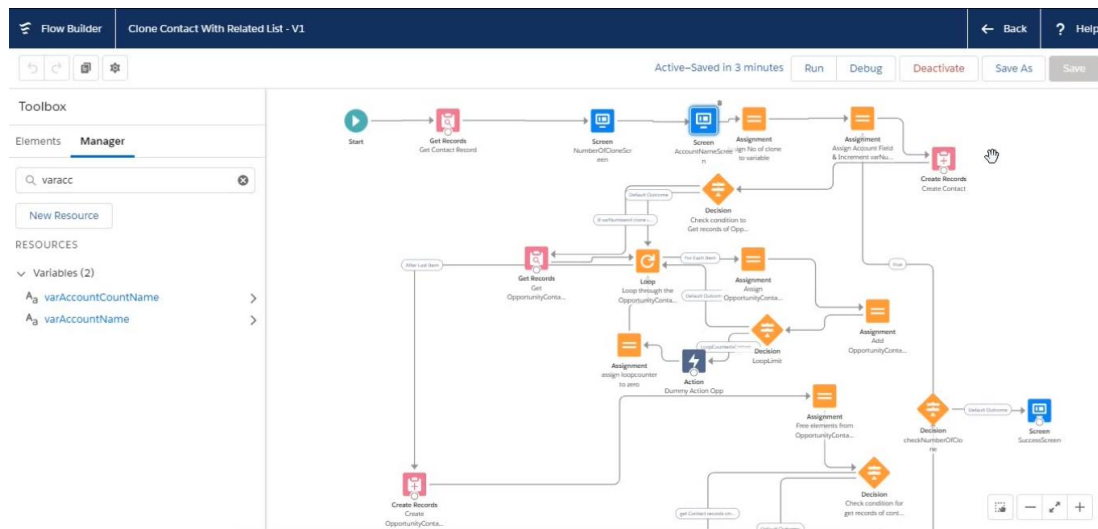
- In Edit Assignment window choose value as {!EmptyCaseColl} and press Done.



- 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.



- Salesforce is rolling out security enhancements that can impact your org. [Review Security Alerts](#)

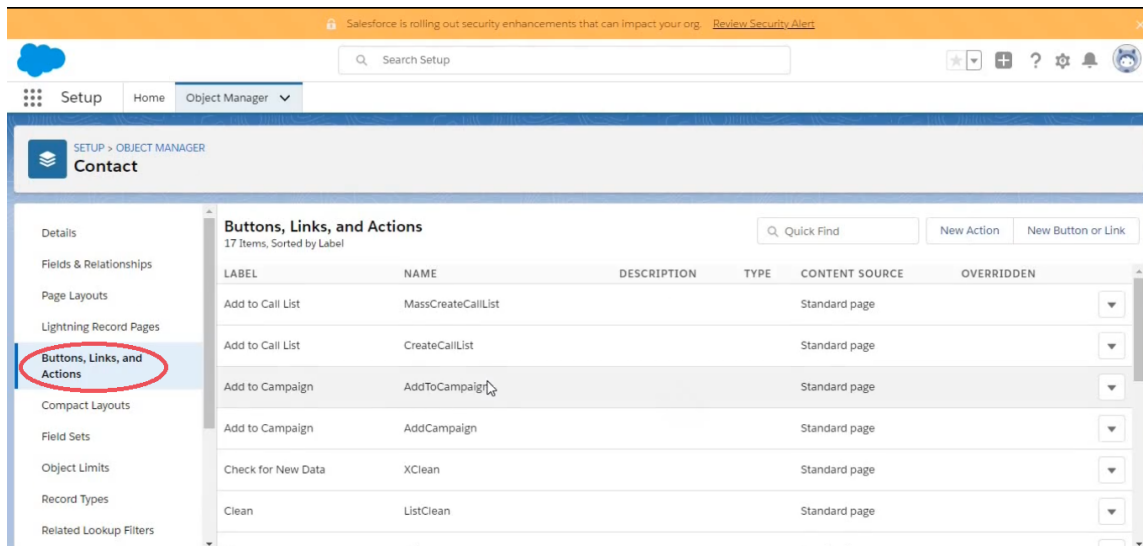
Search Setup

Setup Home Object Manager

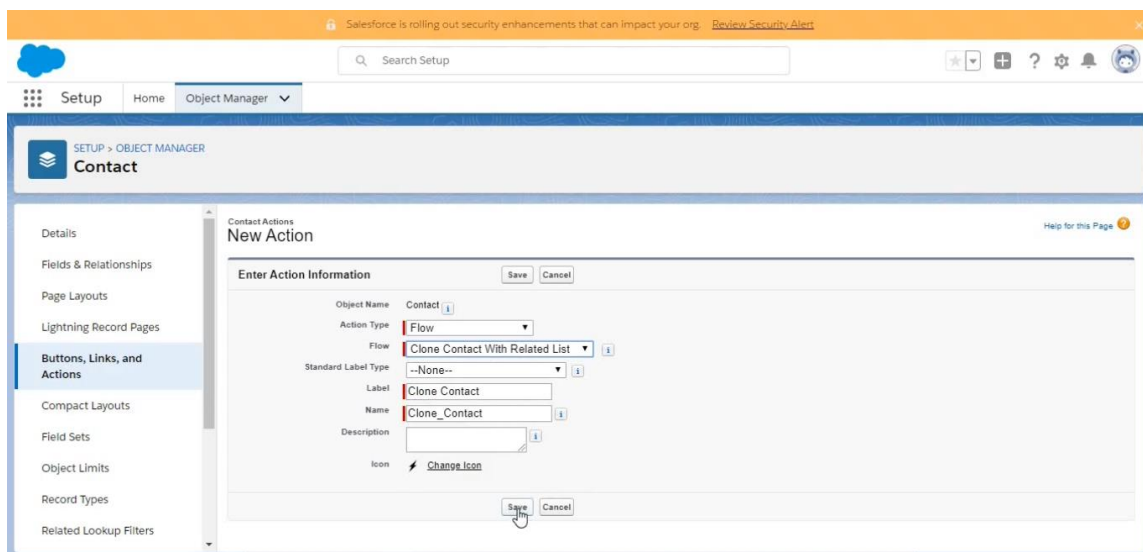
Object Manager

7 Items, Sorted by Label

Label	API Name	Description	Last Modified	Deployed	Custom
Contact	Contact				
Contact Point Consent	ContactPointConsent				
Contact Point Email	ContactPointEmail				
Contact Point Phone	ContactPointPhone				
Contact Point Type Consent	ContactPointTypeConsent				
Contact Request	ContactRequest				
Opportunity Contact Role	OpportunityContactRole				



- 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](#)

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

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Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Mobile Action Name

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Add to Call List Check for New Data Edit Get Survey Invita... New Account New Group New Task

Call Clone Email Link New Case New Lead Poll

Change Owner Clone Contact Email (mobile only) Log a Call New Contact New Note Post

Change Record Type Delete File Mobile Smart Actions New Event New Opportunity Printable View

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 Start Conversation

Custom Buttons

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Save Quick Save Preview As... Cancel Undo Redo Layout Properties

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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)

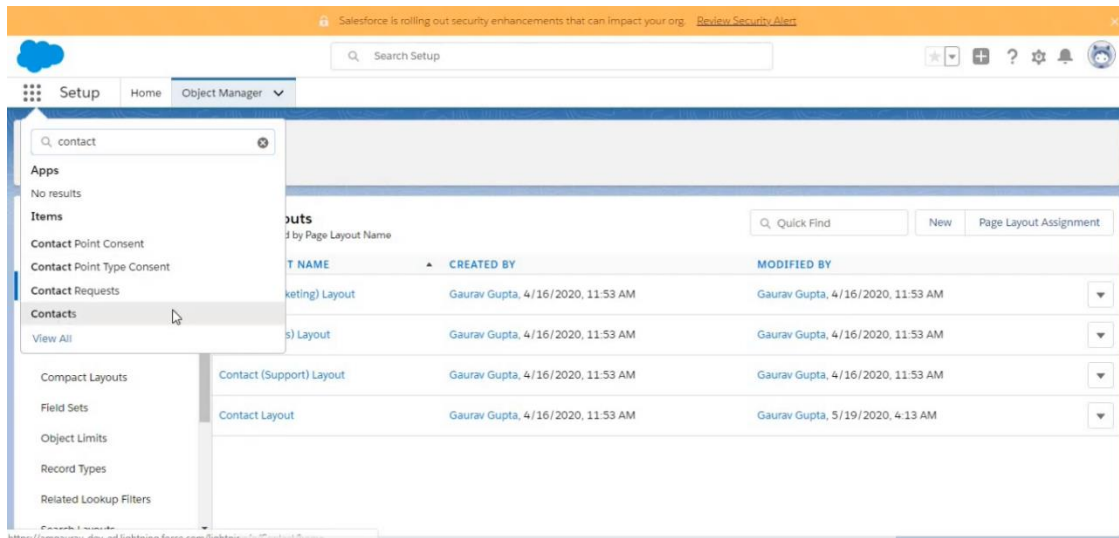
Contact Detail

Standard Buttons

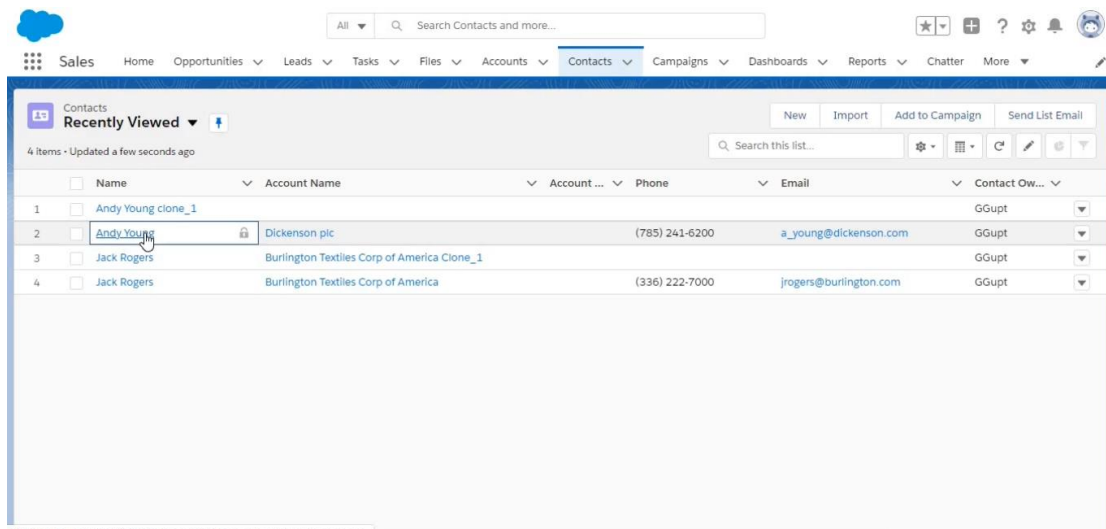
Change Record Type Edit Delete View Contact Hierarchy Clone Change Owner Sharing Get Survey Invitation Check for New Data Add to Call List Printable View Start Conversation

Custom Buttons

- To see how the flow works go to Contacts.



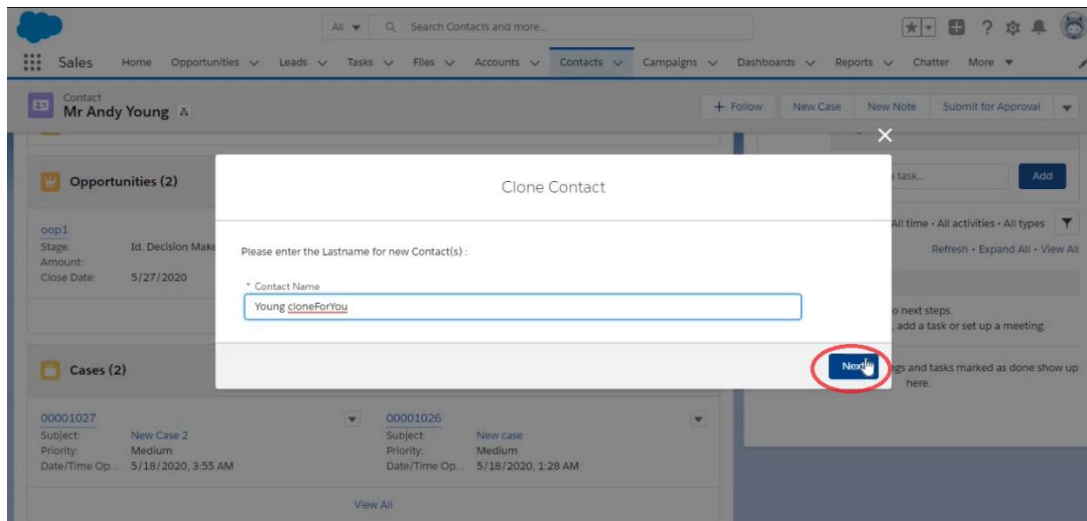
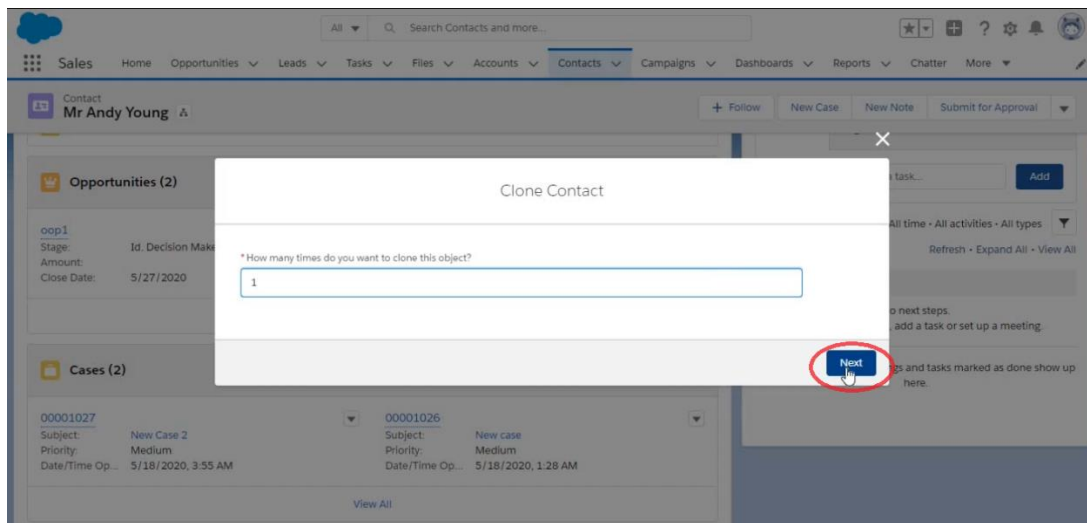
- Select a contact you want to clone.



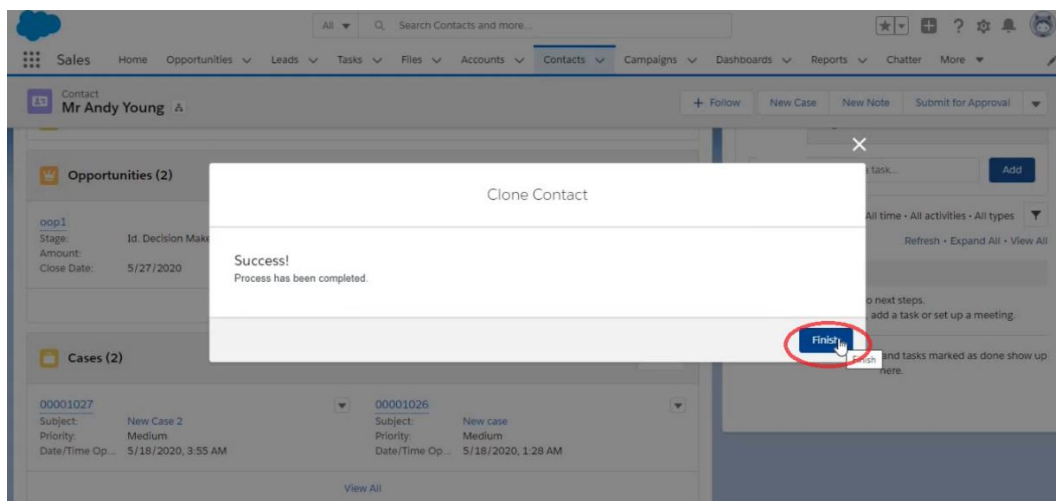
The screenshot shows the Salesforce CRM interface for the contact 'Mr. Andy Young'. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', and 'More'. The left sidebar shows the 'Opportunities (2)' and 'Cases (2)' sections. The 'Opportunities' section displays a table with columns for 'Id', 'Decision Makers', 'Stage', 'Qualification', 'Amount', and 'Close Date'. The 'Cases' section displays a table with columns for 'Subject', 'Priority', and 'Date/Time Op...'. The right sidebar shows the 'Upcoming & Overdue' section with a 'Create a task...' button and a 'Filters' dropdown.

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

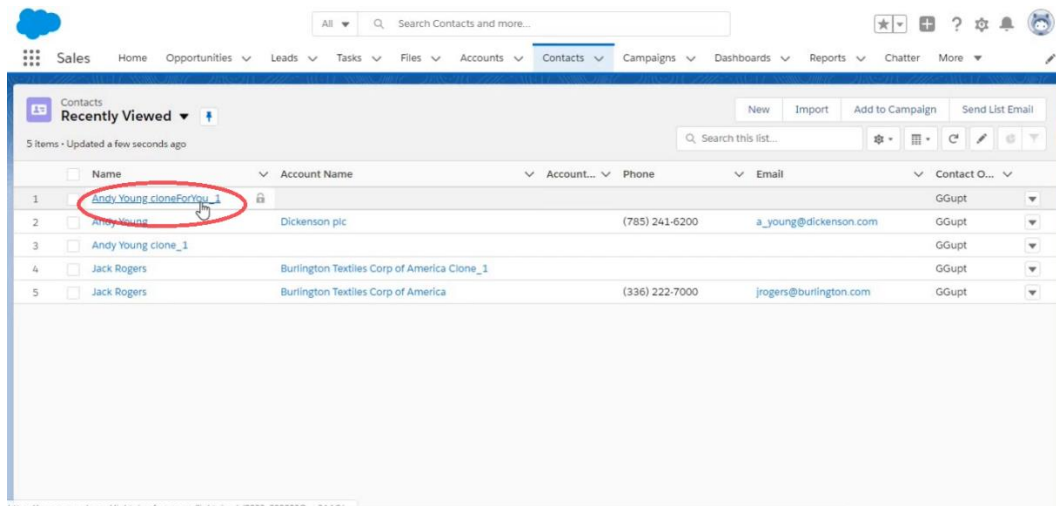
The screenshot shows the Salesforce CRM interface for the contact 'Mr. Andy Young'. The top navigation bar is the same as the previous screenshot. The left sidebar shows the 'Opportunities (2)' and 'Cases (2)' sections. The right sidebar shows the 'Upcoming & Overdue' section. A quick actions menu is open on the right, showing options: 'Clone', 'Edit', 'Clone Contact', 'Delete', 'Refresh', 'Change Owner', 'Check for N...', and 'Change Owner'. The 'Clone Contact' option is highlighted with a red circle.



- Once the process is finished, success window appears.



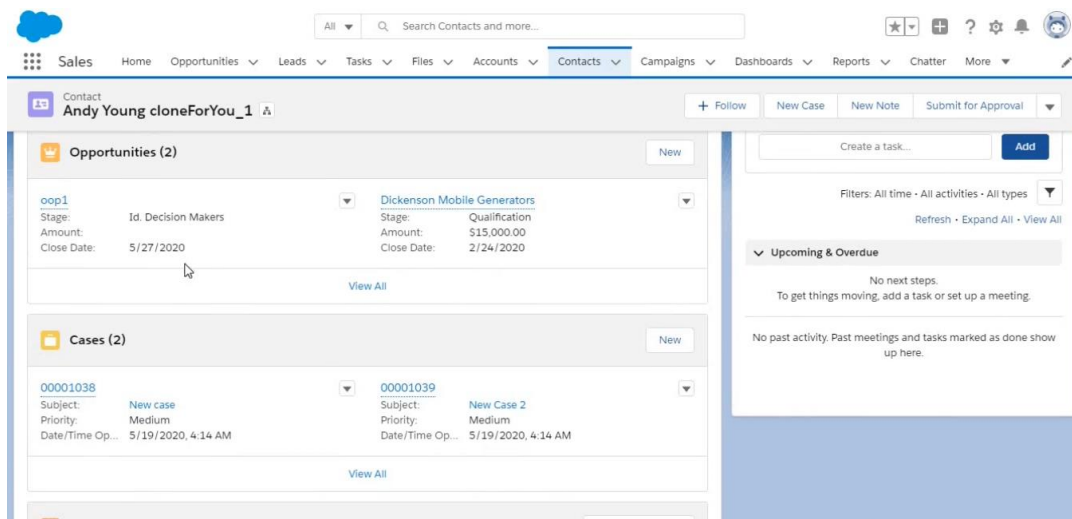
- Go back to Contacts and you will see the new cloned Contacts along with its related lists.



Contacts Recently Viewed 5 items • Updated a few seconds ago

Search this list...

	Name	Account Name	Account...	Phone	Email	Contact O...
1	<u>Andy Young cloneForYou_1</u>					GGupt
2	Andy Young	Dickenson plc		(785) 241-6200	a_young@dickenson.com	GGupt
3	Andy Young clone_1					GGupt
4	Jack Rogers	Burlington Textiles Corp of America Clone_1				GGupt
5	Jack Rogers	Burlington Textiles Corp of America		(336) 222-7000	jrogers@burlington.com	GGupt



Contact Andy Young cloneForYou_1

+ Follow New Case New Note Submit for Approval

Create a task... Add

Filters: All time • All activities • All types Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

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

Opportunities (2) New

Id	Decision Makers	Dickenson Mobile Generators
oop1	Stage: Id. Decision Makers Amount: 5/27/2020	Stage: Qualification Amount: \$15,000.00 Close Date: 2/24/2020

[View All](#)

Cases (2) New

Id	Subject	Subject
00001038	New case Priority: Medium Date/Time Op... 5/19/2020, 4:14 AM	00001039 New Case 2 Priority: Medium Date/Time Op... 5/19/2020, 4:14 AM

[View All](#)