

Automate Activities - Setup Document

Setup Instructions

- Install the package
- Add the **Automate Activities Permission Set** to the required users
- Go to the App Launcher → Open **Activity Plan tab** and create a new plan with the following fields -
 - Activity Plan Name - Unique Name
 - Description
- Create Activity Plan Items with the following fields
- There are two ways to Automate the Activities, you can choose either one from the below

By Using the Record Triggered Flow

- Create a **lookup** relationship to **Activity Plan** on the object on which Activities need to be created automatically
- Clone the flow **Automate Key Account Activities** to create a new record triggered flow, use the following instructions

By Using Quick Action

- Use the flow **Automate Activities** as a quick action to Automate the Activities
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- Add the **Activity Summary** Flow to the record page to see the Summary of activities along with Pending activities, Tasks to complete, and other details