

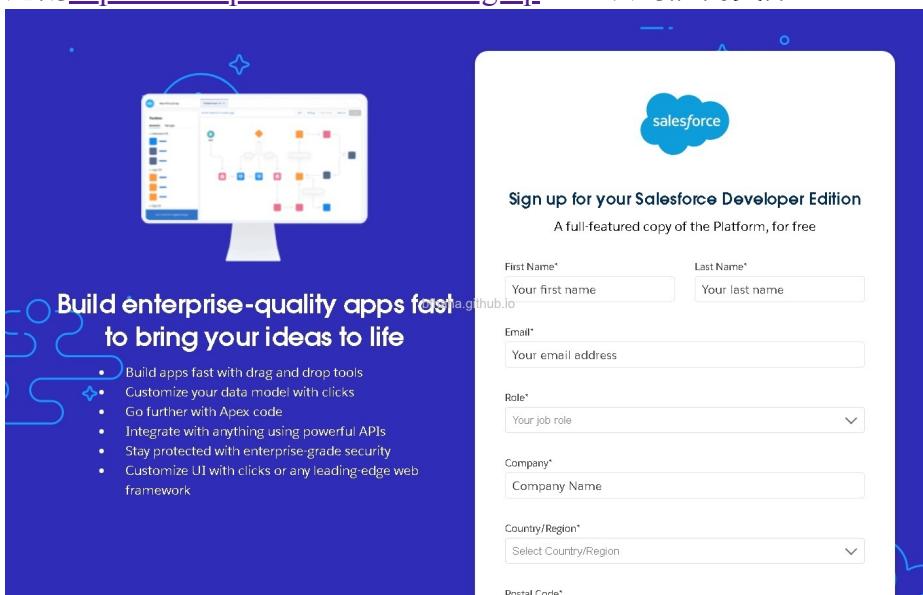
# 顧客關係管理系統Salesforce教學-初階

福別問 著。即將出版，受著作財產權保護，請勿外流。

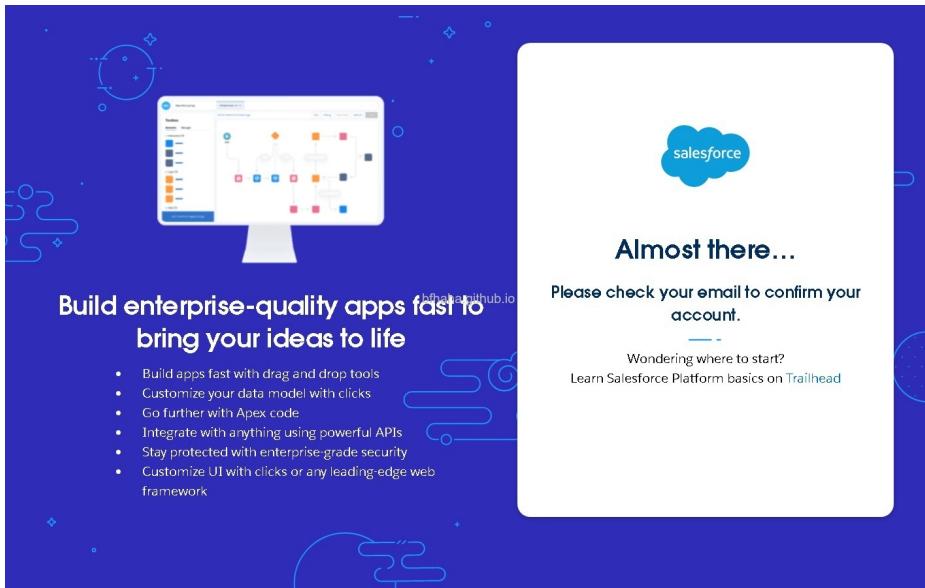
1. 註冊帳號 A
2. 切換到Sales模式 A
3. 更換頭貼 A
4. 名詞定義 A
5. 排序標籤 A
6. 機會與報價單 A
7. 生成紙本報價單 A
8. 手動建立商機 A
9. 從網頁獲得商機 A
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12. 客製標籤 B C
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## 註冊帳號 A

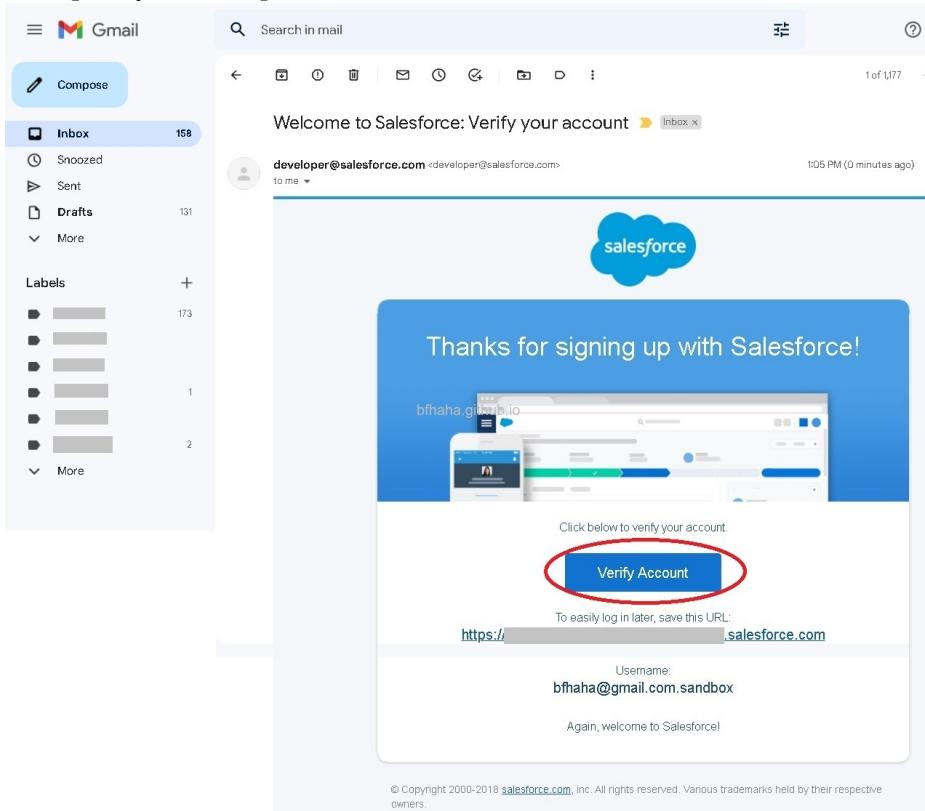
- 造訪<https://developer.salesforce.com/signup>，並填寫註冊資訊。



- 如畫面指示，到信箱收取認證信。



- 點選[Verify Account]。



- 接著設定密碼，完成後即會自動登入。注意，之後是到<https://login.salesforce.com>登入，用username登入，不是用信箱。



Change Your Password

Enter a new password for [REDACTED]. Make sure to include at least:

- 8 characters
- 1 letter      bfhaha.github.io
- 1 number

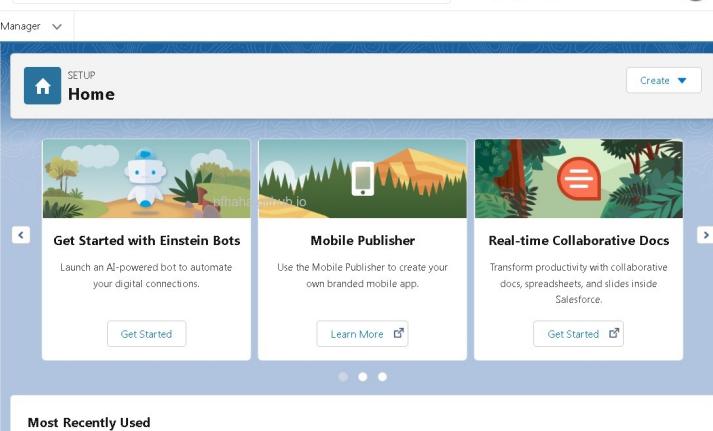
\* New Password

\* Confirm New Password

Security Question  
**In what city were you born?**

\* Answer

- 登入後的畫面。



Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

> Users

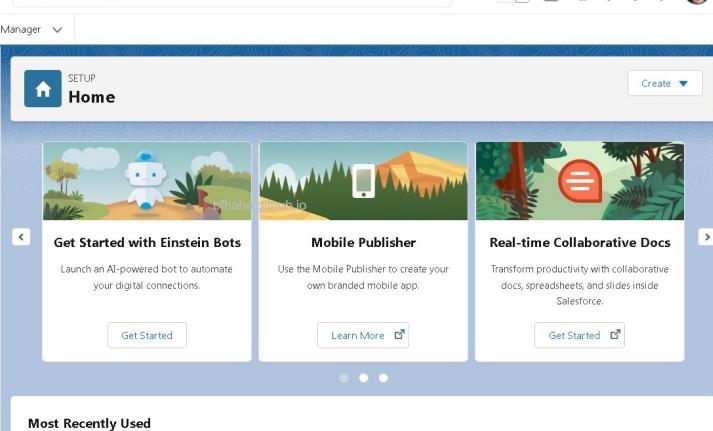
> Data

> Email

Most Recently Used

## 切換到Sales模式 A

- 預設是[Setup]設定畫面



Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

New Salesforce Mobile App QuickStart

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

Most Recently Used

- 點選左上角的九宮格圖示 (App Launcher) · 搜尋sales · 選擇[Sales] (手機中有一個閃電的圖示)。

- [Sales]畫面。

## 更換頭貼 A

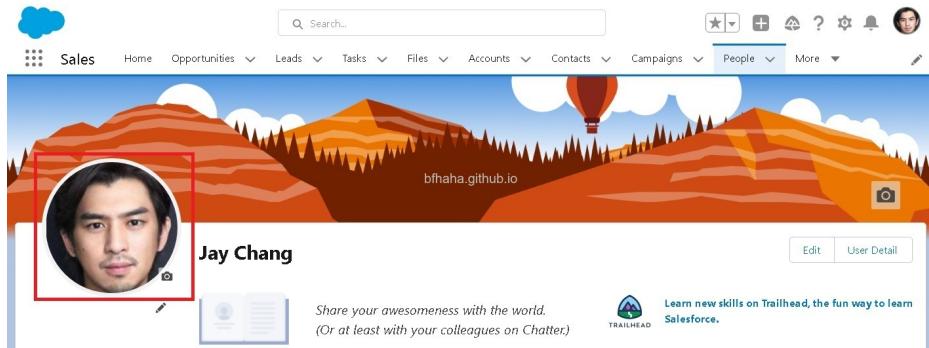
請各位同學務必要更換，否則助教無法辨別作業。

- 點選右上角的眯寶頭像

- 再點選一次頭像。

- 點選頭像右下角的相機，上傳頭像。

- 成功更換頭像。

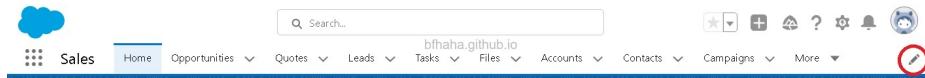


## 名詞定義 A

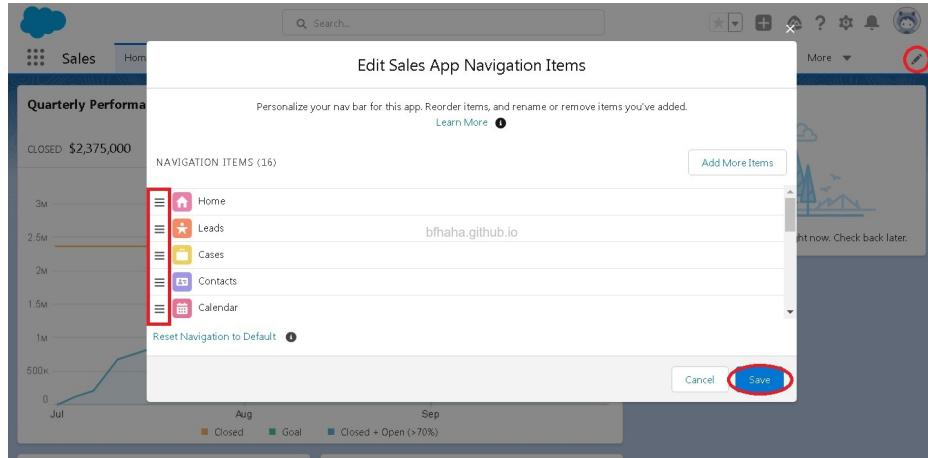
英文	官方翻譯	更貼切的翻譯
Object	物件	標籤
Field	欄位	
Record	記錄	
<b>標籤</b>	<b>官方翻譯</b>	<b>更貼切的翻譯</b>
Home	首頁	
Opportunities	機會	進一步的商機
Leads	商機	一開始的商機
Tasks	工作	任務
Files	檔案	
Accounts	帳戶	公司
Contacts	連絡人	
Campaigns	活動	
Dashboards	顯示面板	
Cases	個案	客戶意見

## 排序標籤 A

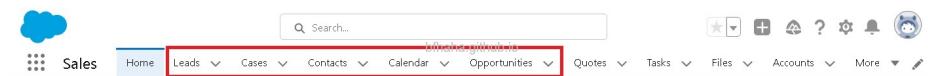
- 點選右上角的鉛筆。



- 將標籤按照Leads, Cases, Contact, Calendar, Opportunities排序，點選[Save]。

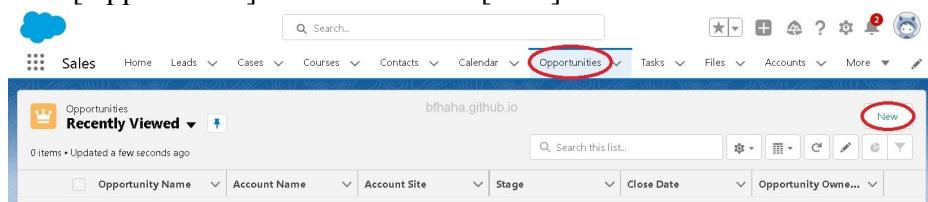


- 更換順序後。

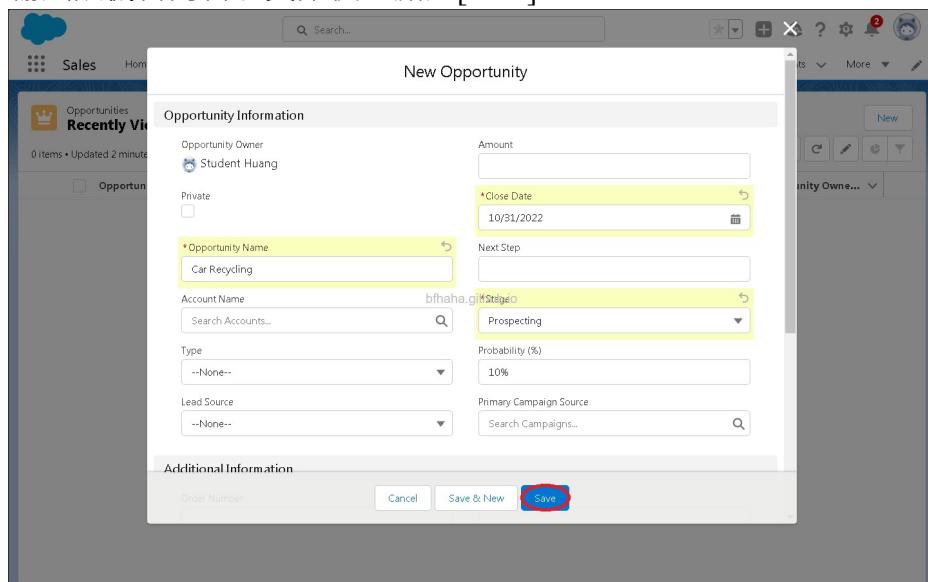


## 機會與報價單 A

- 點選[Opportunities]，點選右上角的[New]，新增一筆機會。



- 輸入該機會的各項資訊後，點選[Save]。



- 稍微看一下進度條。注意到此時還沒有報價功能，接著我們要開啟報價功能。

- 點選右上角齒輪圖示，選擇[Setup]。

- 搜尋[Quote Settings]，點選[Enable]。

- 勾選所有Layout後點選[Save]。

- 回到[Opportunity]，隨便選擇一筆記錄。

- 可以看到有[Quotes]的功能了。

The screenshot shows the Salesforce Opportunities page. At the top, there's a navigation bar with links like Sales, Home, Leads, Cases, Contacts, Calendar, Opportunities, Tasks, Files, Accounts, More, and a search bar. Below the navigation is a header for an opportunity named "Subway". The main content area displays various details about the opportunity, including its status, amount, probability, and close date. At the bottom right of the main content area, there's a button labeled "Quotes (0)". This button is highlighted with a red box.

## 生成紙本報價單 A

- 承接上一張簡報的內容，按下[Quotes]旁邊的向下箭頭，選擇>New Quote]。

This screenshot shows the same Opportunities page as the previous one, but for an opportunity named "Car Recycling". The Quotes section is again highlighted with a red box. To the right of the "Quotes (0)" button, there's a small downward-pointing arrow. This arrow is circled in red to indicate where the user should click to open the dropdown menu.

- 建立一筆新的報價後點選[Save]。

This screenshot shows the "New Quote" dialog box. It has a "Quote Information" section with fields for Quote Number, Expiration Date, Syncing, Quote Name (which is set to "1000 per kg"), Opportunity Name (set to "Car Recycling"), Status (set to "Draft"), Account Name, and Description. At the bottom of the dialog, there are three buttons: "Cancel", "Save & New", and "Save". The "Save" button is highlighted with a red circle.

- 點選剛剛建立的報價。

The screenshot shows the Salesforce Opportunities page. A quote card for "Car Recycling" is displayed. The quote number is 00000001. The quote name is "1000 per kg". The status is "Presented". The probability is 10%, and the close date is 10/21/2022. The last modified user is "Student Chu" at 10/11/2022, 10:36 AM.

- 點選右上角的向下箭頭，選擇[Create PDF]。

The screenshot shows the Salesforce Quotes page. A quote for "1000 per kg" is selected. In the top right corner, a context menu is open with a downward arrow. The "Create PDF" option is highlighted with a red circle.

- 點選[Save to Quote]。

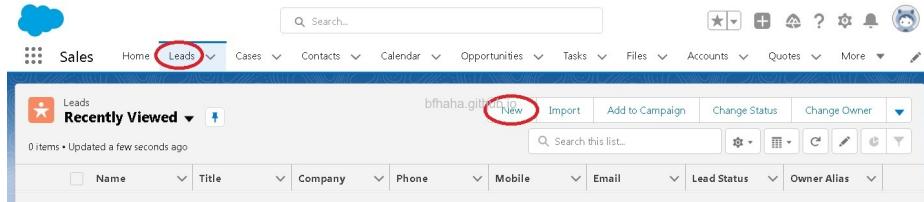
The screenshot shows a PDF preview window titled "quoteTemplateDataViewer.apexp". It displays a quote template with fields like Company Address, Prepared By, and Subtotal. At the bottom, there are three buttons: "Save and Email Quote", "Save to Quote" (which is highlighted with a red circle), and "Cancel".

- 可以看到儲存成PDF檔案準備日後列印。

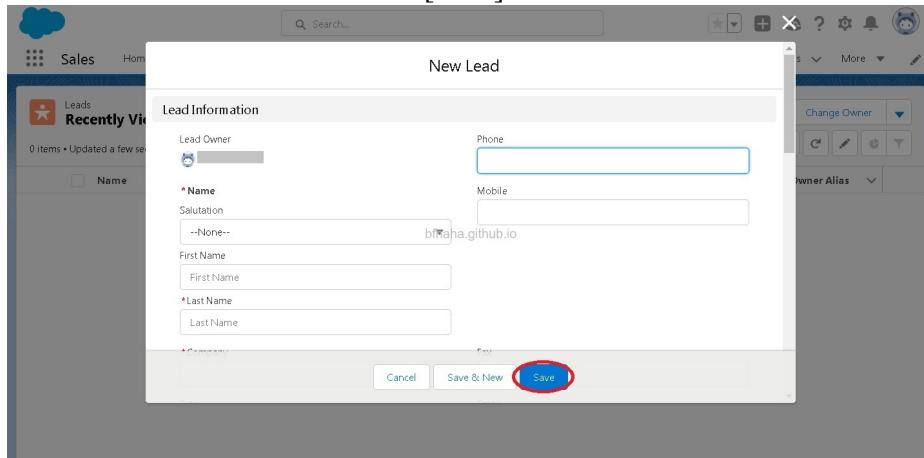
The screenshot shows the Salesforce Quotes page. The quote for "1000 per kg" now has a "Quote PDFs" section. It contains one item named "1000 per kg\_V1.pdf". The status bar at the bottom indicates "Work Status as Complete".

## 手動建立商機 A

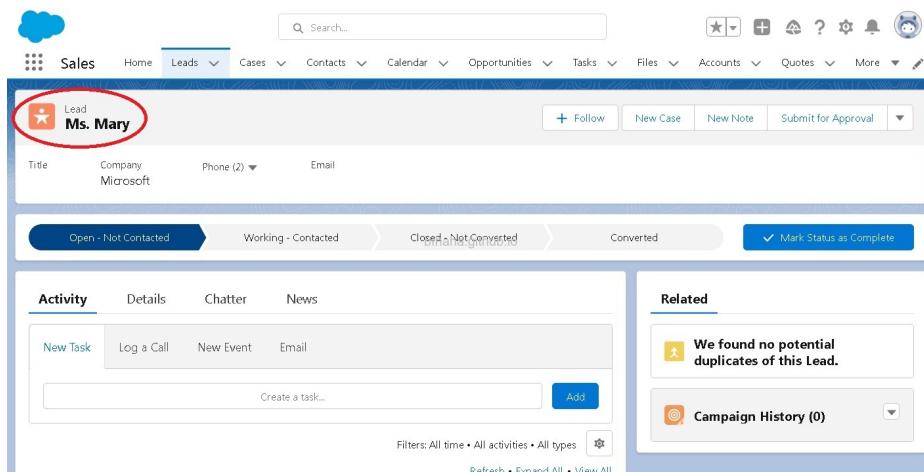
- 點選[Leads]標籤，點選右上角的[New]。



- 輸入稱謂、姓名、公司，點選[Save]。



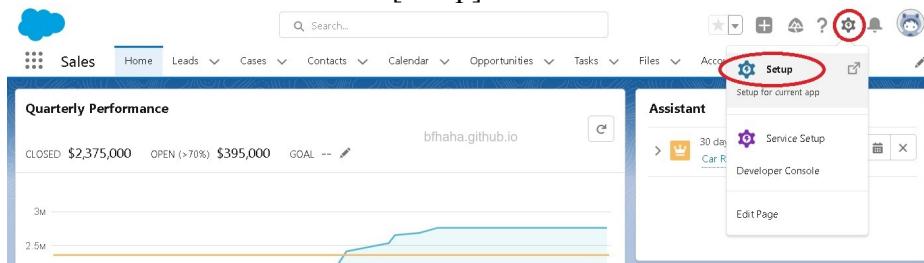
- 成功新增一筆商機。



## 從網頁獲得商機 A

一般來說，在這個網路時代，商機較常透過網路獲得，而非手動建立，我們來看如何實現這個功能。

- 點選右上角齒輪圖示，選擇[Setup]。



- 搜尋web-to-lead，並點選[Web-to-Lead]。

The screenshot shows the Salesforce Setup interface. In the top left, there's a search bar with 'Search Setup' and the text 'Q web-to-lead'. Below it, under 'Marketing', the 'Web-to-Lead' option is circled in red. The main content area displays a preview of a website with three cards: a blue robot, a smartphone, and a red button.

- 點選[Create Web-to-Lead Form]。

The screenshot shows the 'Web-to-Lead' setup page. At the top, there's a 'Web-to-Lead Settings' section with a checkbox for 'Web-to-Lead Enabled' (which is checked) and a 'Create Web-to-Lead Form' button circled in red. Below this, there's a 'Create a Web-to-Lead Form' section where fields like First Name, Last Name, and Email are listed. A large blue callout points to the 'Create New Lead' button on a screenshot of a lead capture form.

- 增減適當的欄位，並且取消勾選[Include reCAPTCHA in HTML]，點選[Generate]。

The screenshot shows the 'Create a Web-to-Lead Form' page. It has two lists: 'Available Fields' on the left and 'Selected Fields' on the right. The 'Selected Fields' list contains 'First Name' and 'Email', both of which are circled in red. Below these lists, there's a note about adding custom fields. At the bottom, there's a 'Return URL' field set to 'http://', a checkbox for 'Include reCAPTCHA in HTML' (which is circled in red), and a 'Generate' button circled in red.

- 複製HTML程式碼，點選[Finished]。

The screenshot shows the 'Web-to-Lead' setup page again. It displays a large block of sample HTML code. The bottom of the page features a 'Finished' button circled in red.

- 將剛剛複製的HTML程式碼，貼到網頁程式碼的<body>與</body>中間，可以使用W3Schools Tryit Editor。記得將debug的部分取消註解。

```

<!DOCTYPE html>
<html>

<head>
<!-- NOTE: Please add the following <META> element to your page <HEAD>. -->
<!-- If necessary, please modify the charset parameter to specify the -->
<!-- character set of your HTML page. -->
<!-->
<META HTTP-EQUIV="Content-type" CONTENT="text/html; charset=UTF-8">
</head>

<body>
<!-->
<!-- NOTE: Please add the following <FORM> element to your page@haha.github.io -->
<!-->

<form action="https://webto.salesforce.com/servlet/servlet.WebToLead?encoding=UTF-8" method="POST">

<input type="hidden" name="oid" value="0004x000008ZPfI">
<input type="hidden" name="retURL" value="http://">

<!-->
<!-- NOTE: These fields are optional debugging elements. Please uncomment -->
<!-- these lines if you wish to test in debug mode. -->
<input type="hidden" name="debug" value="1">
<input type="hidden" name="debugEmail" value="bfhaha@hotmail.com">
<!-->

<label for="first_name">First Name</label><input id="first_name" maxlength="40" name="first_name" size="20" type="text" /><br>

```

- 顧客提交商機表單。

```

<!DOCTYPE html>
<html>

<head>
<!-- NOTE: Please add the following <META> element to your page <HEAD>. -->
<!-- If necessary, please modify the charset parameter to specify the -->
<!-- character set of your HTML page. -->
<!-->
<META HTTP-EQUIV="Content-type" CONTENT="text/html; charset=UTF-8">
</head>

<body>
<!-->
<!-- NOTE: Please add the following <FORM> element to your page@haha.github.io -->
<!-->

<form action="https://webto.salesforce.com/servlet/servlet.WebToLead?encoding=UTF-8" method="POST">

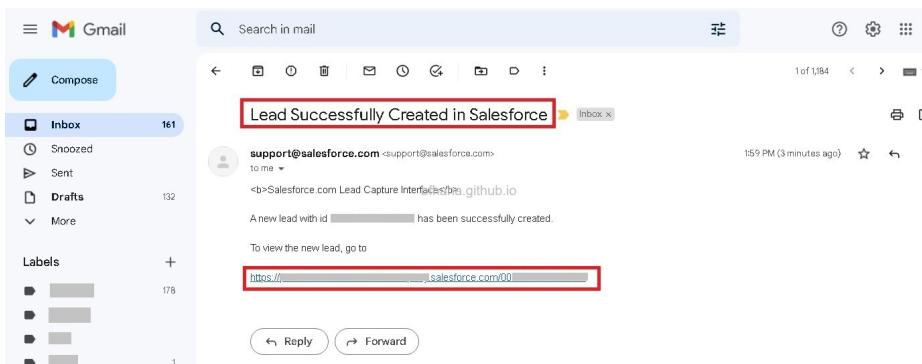
<input type="hidden" name="oid" value="0004x000008ZPfI">
<input type="hidden" name="retURL" value="http://">

<!-->
<!-- NOTE: These fields are optional debugging elements. Please uncomment -->
<!-- these lines if you wish to test in debug mode. -->
<input type="hidden" name="debug" value="1">
<input type="hidden" name="debugEmail" value="bfhaha@hotmail.com">
<!-->

<label for="first_name">First Name</label><input id="first_name" maxlength="40" name="first_name" size="20" type="text" /><br>

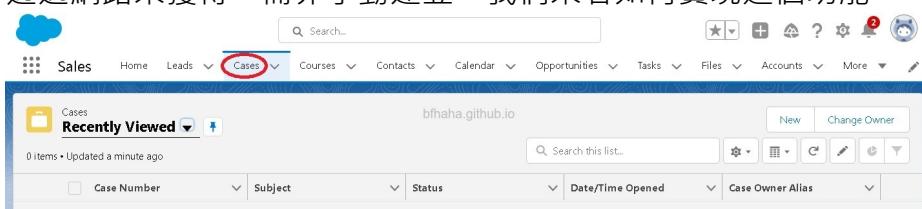
```

- 收到主旨為[Lead Successfully Created in Salesforce]的信件，點選信件中的連結即會回到Salesforce檢視商機。

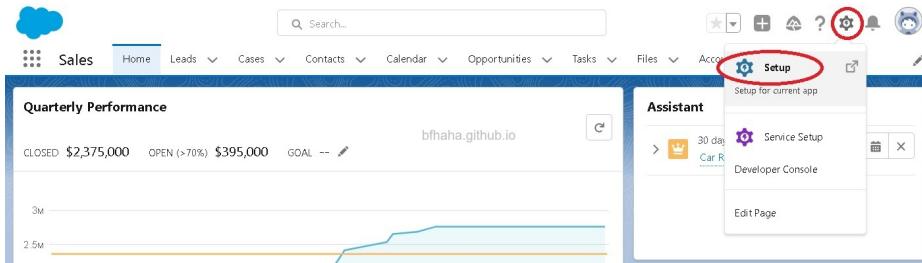


## 從網頁取得顧客回饋 A

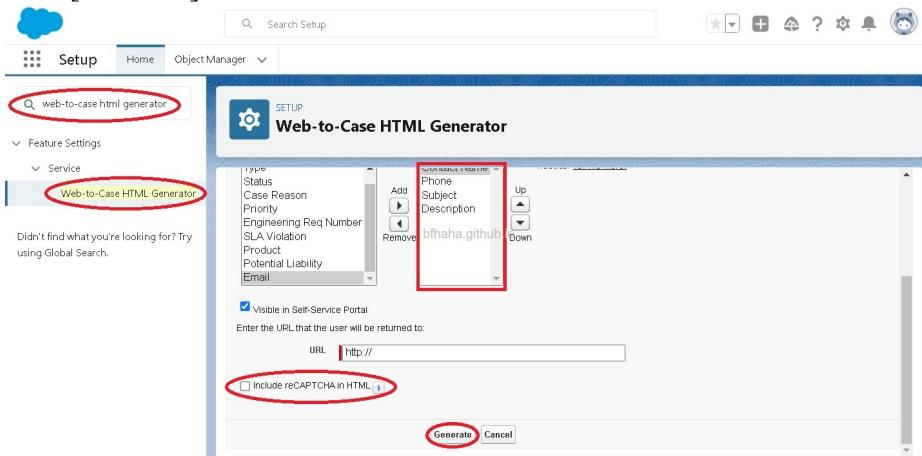
- 點選[Cases]，目前還沒有記錄。case在這裡翻譯成顧客回饋比較貼切。一般來說顧客回饋都是透過網路來獲得，而非手動建立，我們來看如何實現這個功能。



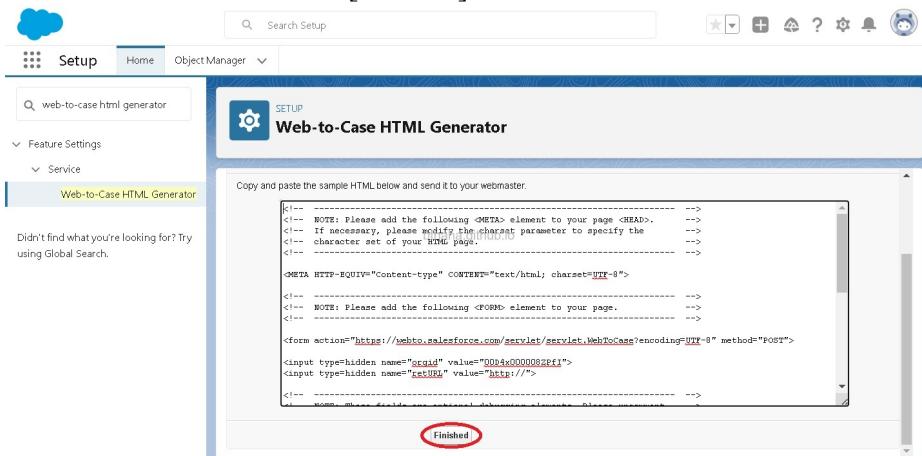
- 點選右上角齒輪圖示，選擇[Setup]。



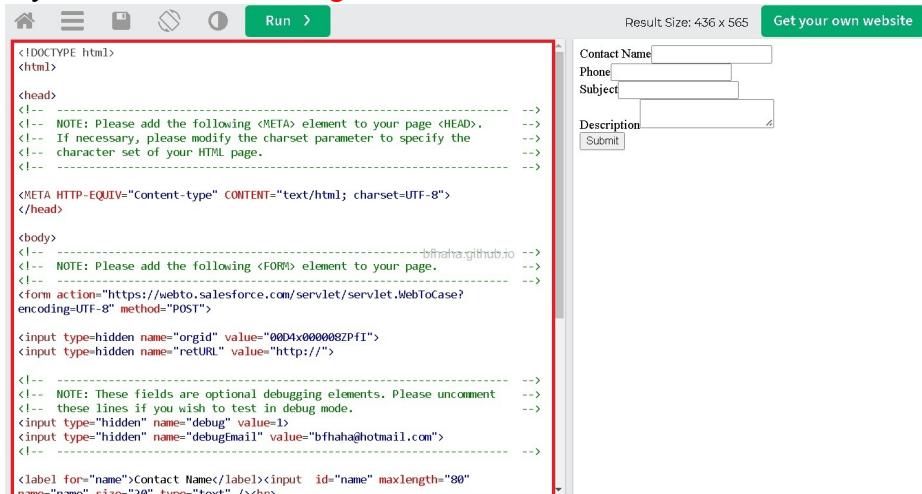
- 搜尋web-to-case html generator。增減適當的欄位，並且取消勾選[Include reCAPTCHA in HTML]，點選[Generate]。



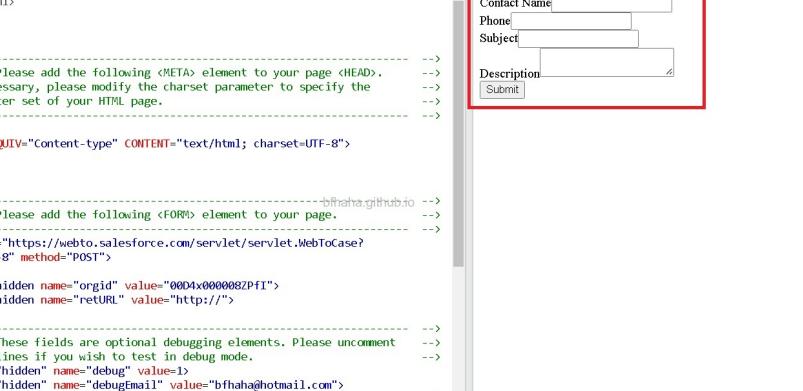
- 複製HTML程式碼，點選[Finished]。



- 將剛剛複製的HTML程式碼，貼到網頁程式碼的<body>與</body>中間，可以使用W3Schools Tryit Editor。記得將debug的部分取消註解。



- 顧客提交回饋表單。



The screenshot shows a browser window with a green header bar containing icons for home, back, forward, and search, along with a "Run >" button. The main content area displays an HTML file with several comments and code snippets. A red rectangular box highlights a group of four input fields: "Contact Name", "Phone", "Subject", and "Description". Below these is a "Submit" button. The entire highlighted area is enclosed in a red border.

```
<!DOCTYPE html>
<html>
<head>
<!--
<!-- NOTE: Please add the following <META> element to your page <HEAD>.
<!-- If necessary, please modify the charset parameter to specify the
<!-- character set of your HTML page.
<!--
-->
<meta http-equiv="Content-type" content="text/html; charset=UTF-8">
</head>

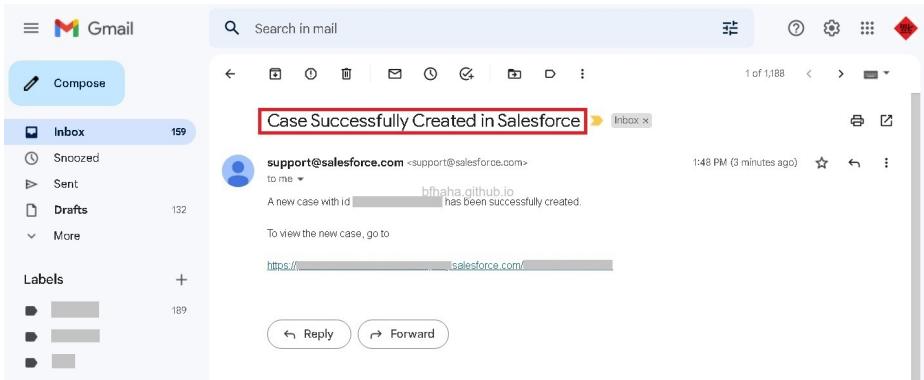
<body>
<!--
<!-- NOTE: Please add the following <FORM> element to your page.
<!--
-->
<form action="https://webto.salesforce.com/servlet/servlet.WebToCase?
encoding=UTF-8" method="POST">

<input type="hidden" name="orgId" value="0004x000000ZPfI">
<input type="hidden" name="retURL" value="http://"/>

<!--
<!-- NOTE: These fields are optional debugging elements. Please uncomment
these lines if you wish to test in debug mode.
<input type="hidden" name="debug" value="1">
<input type="hidden" name="debugEmail" value="bfhaha@hotmail.com">
<!--
-->

<label for="name">Contact Name</label><input id="name" maxlength="80"
name="name" size="20" type="text" /><br>
```

- 收到主旨為[Case Successfully Created in Salesforce]的信件，點選信件中的連結即會回到Salesforce檢視顧客回饋。



# Salesforce手機版

- 到App Store或Google Play下載Salesforce。iOS手機同時按下電源鍵及調高音量鍵（或Home鍵）可以擷取螢幕畫面，Android手機則是同時按下電源鍵及調低音量鍵。

Events

新增

明天 10/3/22

11:00 上午 - 12:00 下午  
CRM

Location

Leads Cases Contacts Events 功能表

## 客製標籤 B C

我們來自訂一個標籤，因為各位還是學生，比較沒有機會接觸做生意，所以我們在這裡以選課為例。

- 點選右上角齒輪圖示，選擇[Setup]。

Quarterly Performance

CLOSED \$2,375,000 OPEN (>70%) \$395,000 GOAL --

3M

2.5M

Setup

- 點選[Object-Manager]標籤，稍微看一下原本就有的標籤。

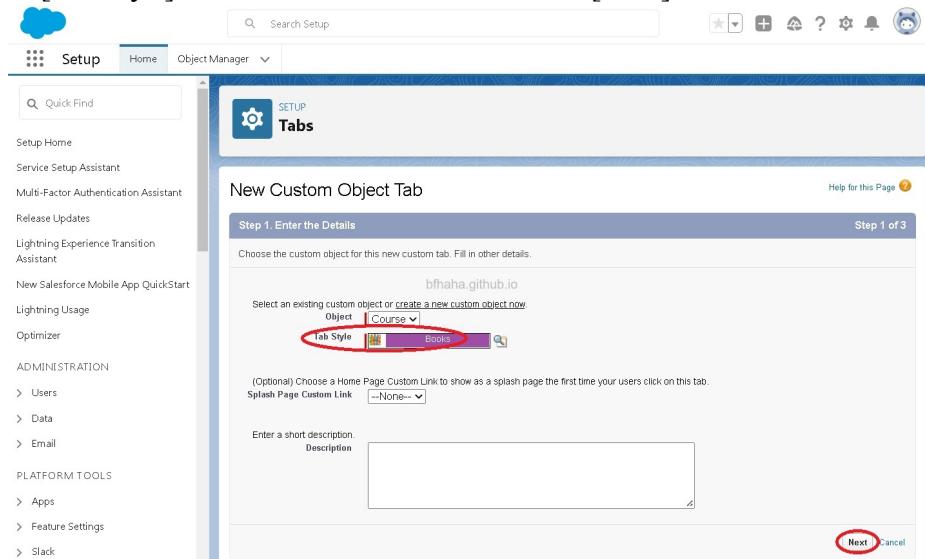
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object	bfhaha.github.io		
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			

- 點選右上角的[Create]，選擇[Custom Object]。

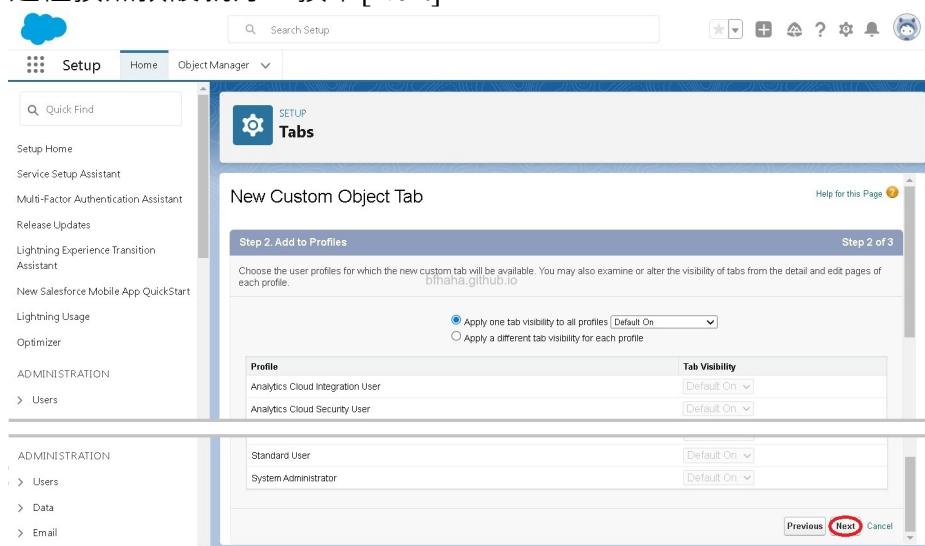
- 我們要建立一個記錄選修課程的標籤，在[Label]輸入Course，在[Plural Label]輸入Courses。

- 記得勾選[Optional Features]、[Search Status]、[Object Creation Options]三個類別中的選項，最後點選[Save]。

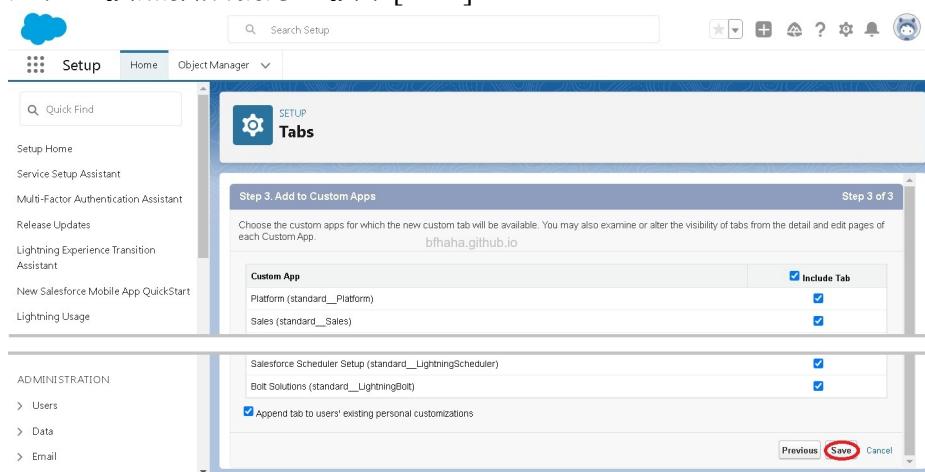
- 在[Tab Style]選擇圖示及顏色，完成後點選[Next]。



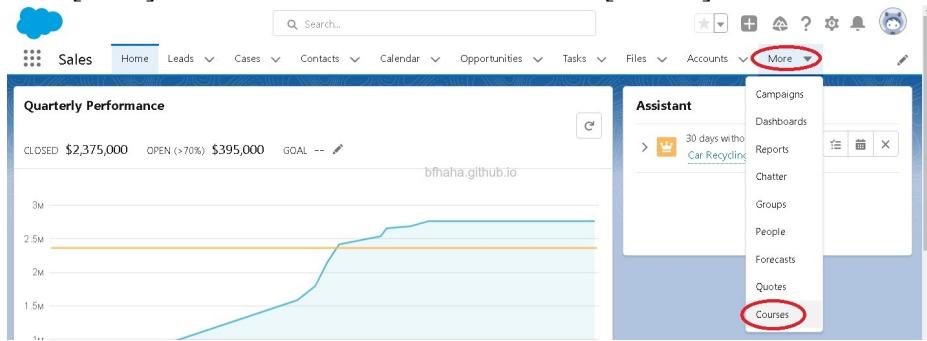
- 這裡按照預設就好，按下[Next]。



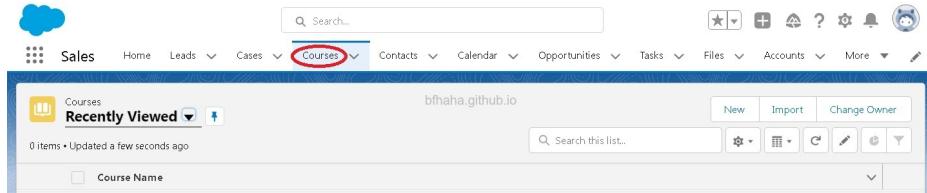
- 這裡也按照預設就好，按下[Save]。



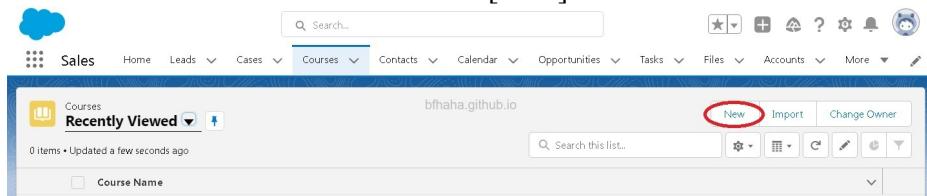
- 回到[Sales]重新整理網頁，檢視新增的標籤[Course]。



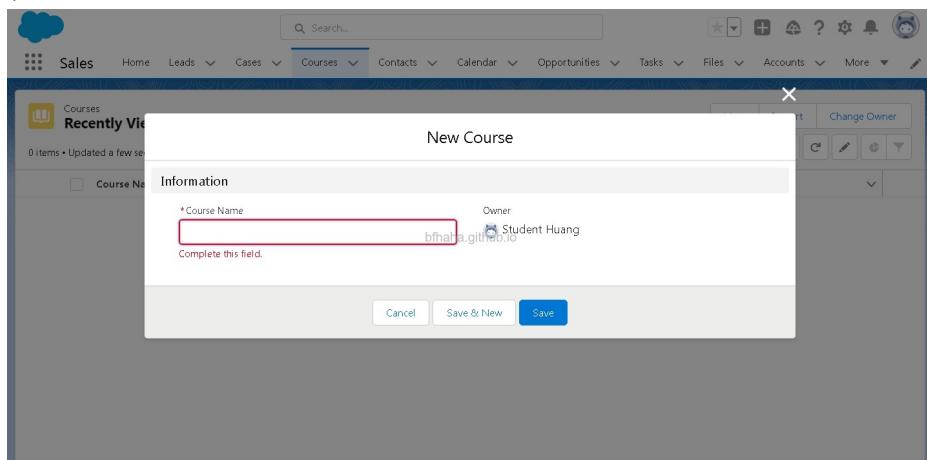
- 或是將這個標籤的順序移到前面，方便使用。



- 嘗試新增一筆記錄，點選右上角的[New]。

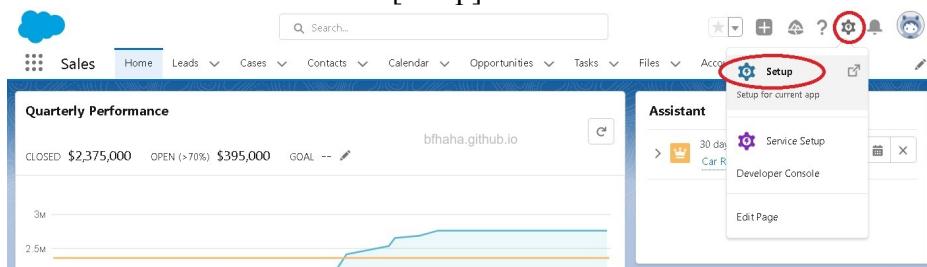


- 注意到目前只有一個欄位，也就是[Course Name]課程名稱，我們接下來新增一個授課教師的欄位。



## 客製標籤-新增欄位 B C

- 點選右上角齒輪圖示，選擇[Setup]。



- 點選[Object-Manager]標籤。

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The page displays a table of objects with columns for Label, API Name, Type, Description, Last Modified, and Deployed. Two objects are listed: 'Account' (Standard Object) and 'Activity' (Standard Object). A search bar and various navigation icons are visible at the top.

- 點選剛剛建立的[Course]。

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The page displays a table of objects with columns for Label, API Name, Type, Description, Last Modified, and Deployed. The 'Course' object is highlighted with a red circle. Other objects listed include Contact Request, Content Version, Contract, Contract Line Item, Credential Stuffing Event Store, Credit Memo, Credit Memo Invoice Application, and Credit Memo Line.

- 在左邊點選[Fields & Relationships]。

The screenshot shows the Salesforce Setup interface for the 'Course' object. The left sidebar shows tabs for Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The 'Fields & Relationships' tab is highlighted with a red circle. The main panel displays the object's details, including Description, API Name (Course\_\_c), Singular Label (Course), Plural Label (Courses), and various deployment settings.

- 在右上角點選[New]。

The screenshot shows the Salesforce Setup interface for the 'Course' object under 'Fields & Relationships'. The top navigation bar includes a 'New' button, which is highlighted with a red circle. The main table lists four fields: Course Name, Created By, Last Modified By, and Owner, each with its field label, name, data type, controlling field, and indexed status.

- [Data Type] 選擇[Master-Detail Relationship]，點選[Next]。

The screenshot shows the 'Course New Custom Field' setup page. In the 'Data Type' section, the 'Master-Detail Relationship' option is selected and circled in red. The 'Next' button at the bottom right is also circled in red.

- [Related To] 選擇[Contact]，表示說這個授課教師會是從連絡人中選擇，或是新增至連絡人，點選[Next]。

The screenshot shows the 'Course New Relationship' setup page. The 'Related To' dropdown is set to 'Contact' and circled in red. The 'Next' button at the bottom right is also circled in red.

- [Field Label] 輸入 Instructor 或是 Lecturer 或是 Professor，點選[Next]。

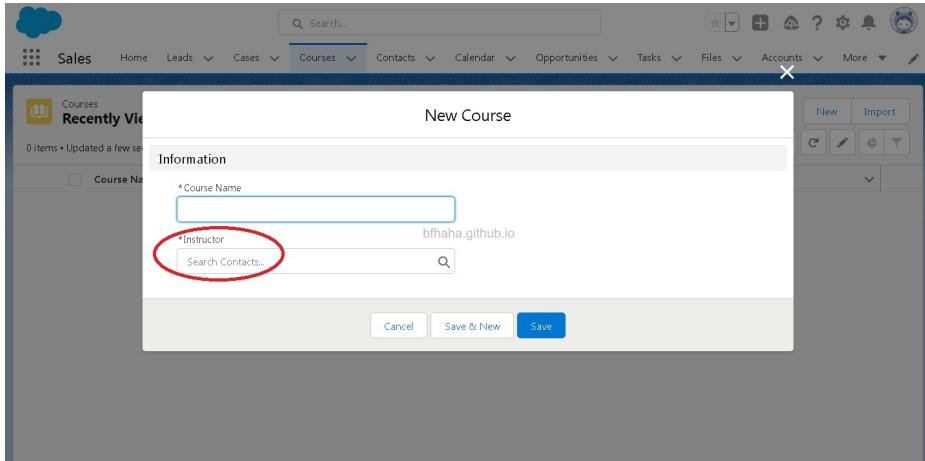
The screenshot shows the 'Course New Relationship' setup page, Step 3. The 'Field Label' input field contains 'Instructor' and is circled in red. The 'Next' button at the bottom right is also circled in red.

- 這裡按照預設就好，點選[Next]。

- 這裡也是按照預設就好，點選[Next]。

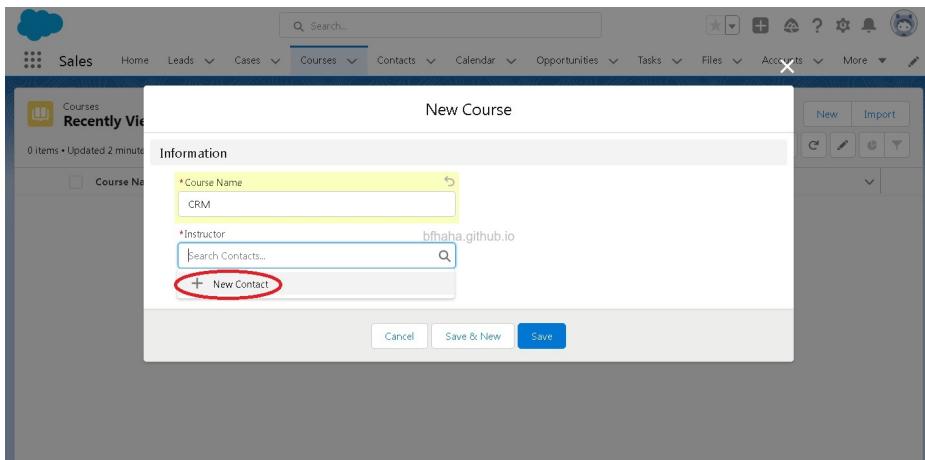
- 最後按照預設，點選[Save]完成。

- 回到[Course]標籤，新增一筆記錄，可以看到多了一個[Instructor]欄位。

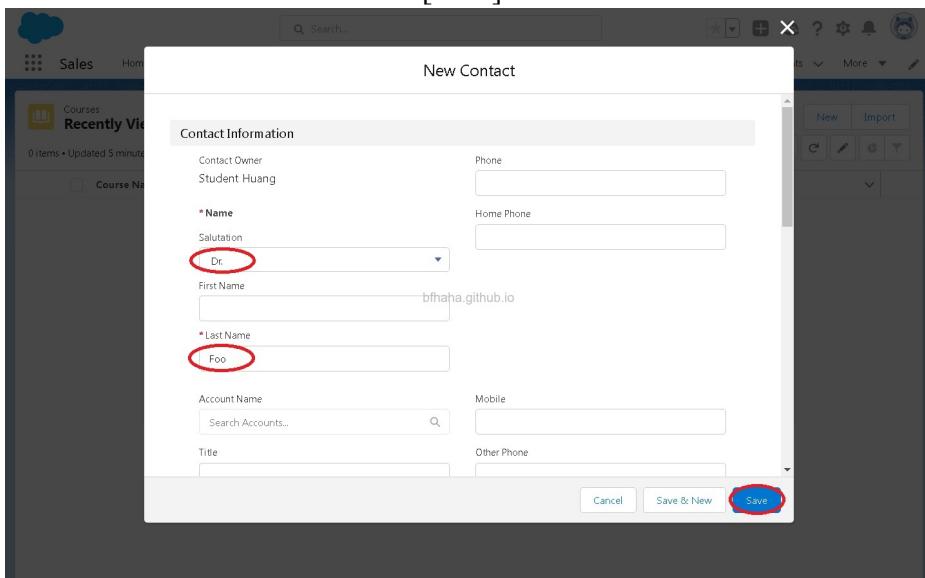


## 客製標籤-新增記錄 B

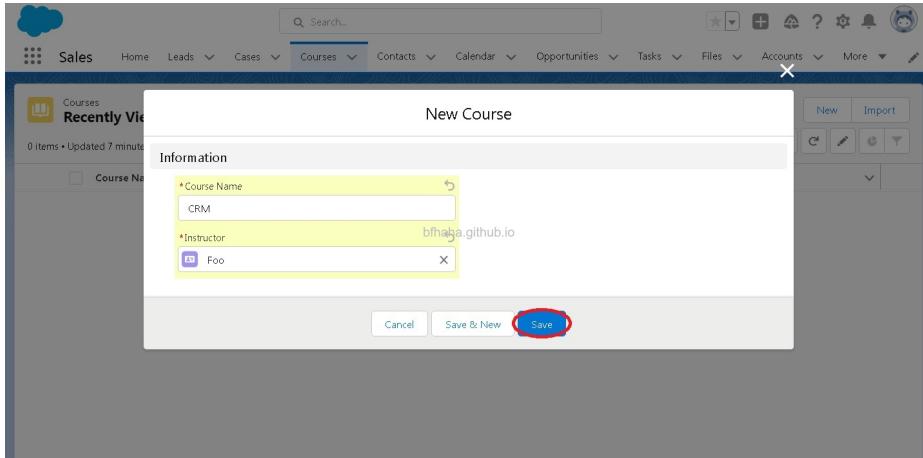
- 承接上一張投影片，新增一個課程。在[Instructor]的部分，選擇[New Contact]，我們要直接新增連絡人。



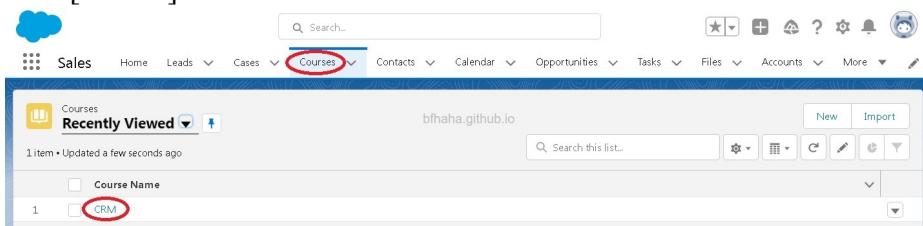
- 輸入授課教師的資料後，點選[Save]。



- 點選[Save]新增記錄。

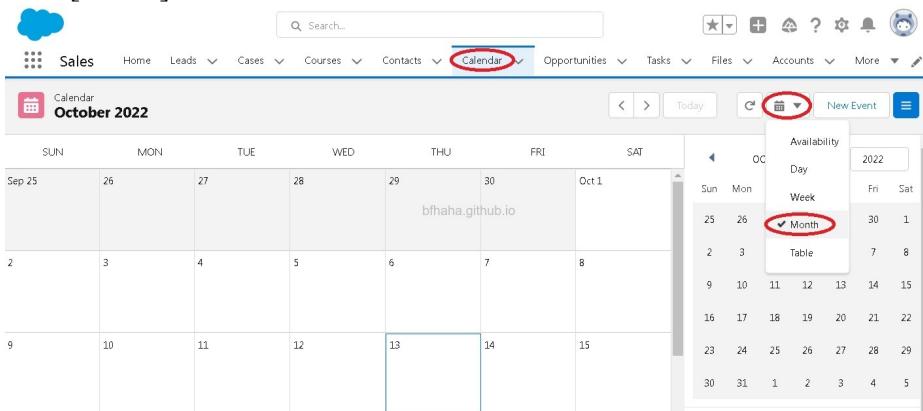


- 點選[Course]標籤，可以看到剛剛新增的記錄。

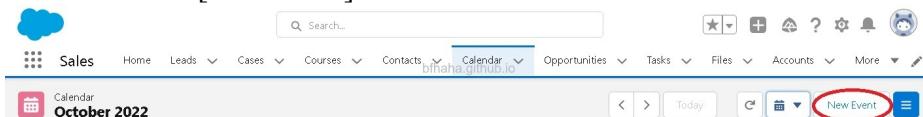


## 新增課表-設定每周重複的事件 B

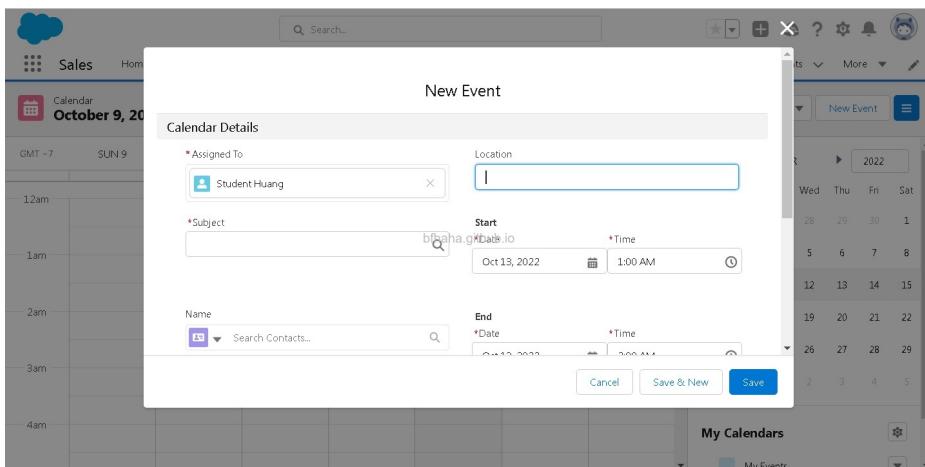
- 我們接著要把課程時間加入行事曆做成課表。點選[Calendar]標籤，先點選右上角的月曆圖示，選擇[Month]，改成月曆檢視。



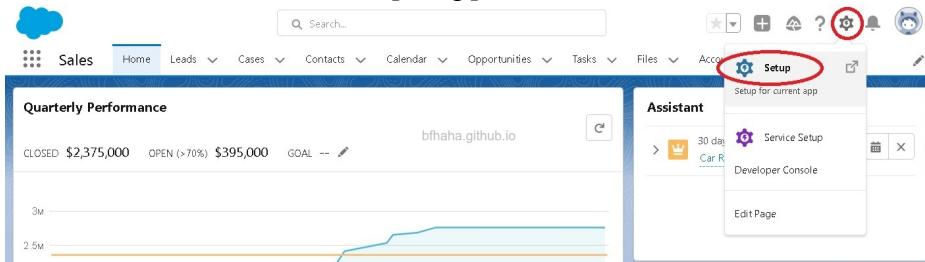
- 點選右上角的[New Event]。



- 但注意到事件的時間沒辦法設定每周重複，不適合我們的課表，但其實是可以的，只是該功能被關閉了，我們現在來打開這個功能。



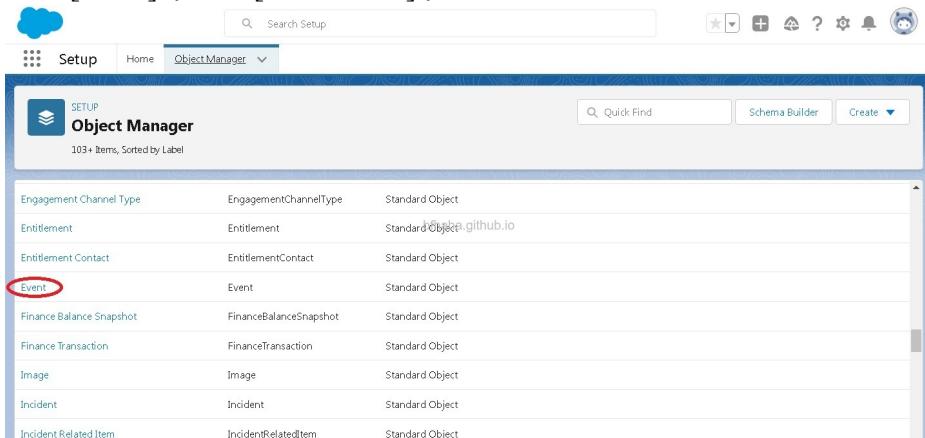
- 點選右上角齒輪圖示，選擇[Setup]。



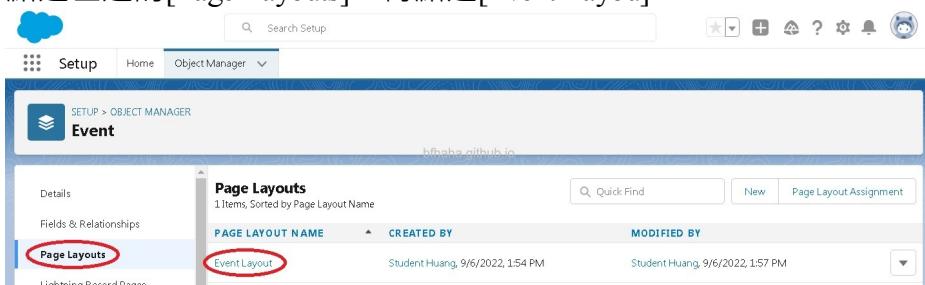
- 點選[Object-Manager]標籤。



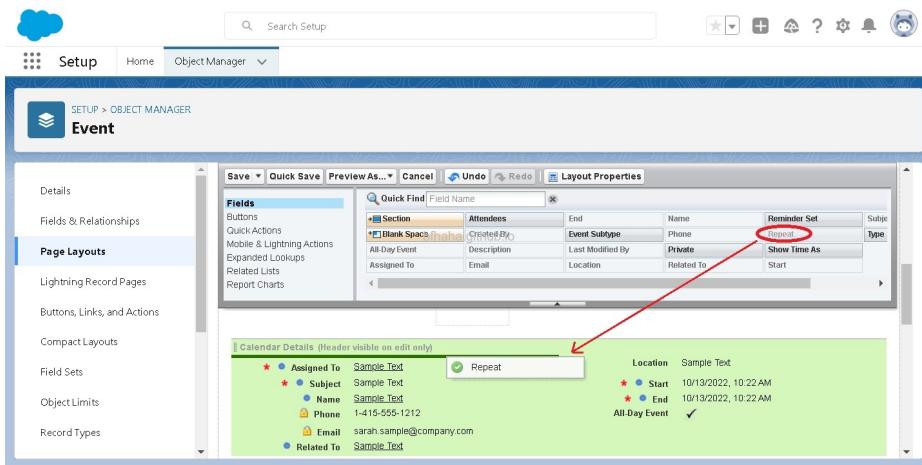
- 點選[Event] (不是[Event Store] )。



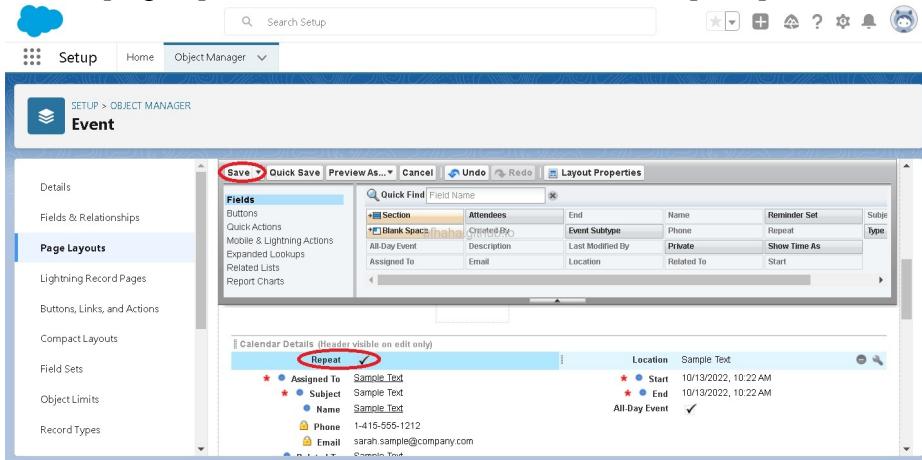
- 點選左邊的[Page Layouts]，再點選[Event Layout]。



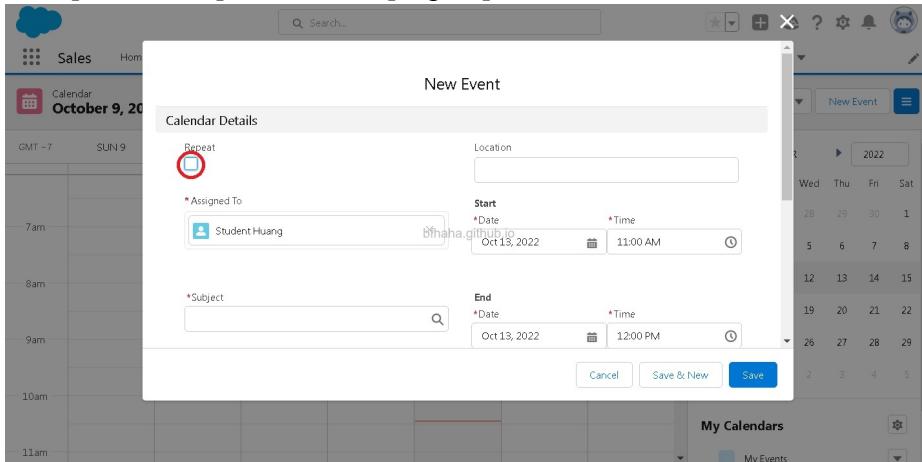
- 把[Repeat]拖曳到[Assigned To]前面。（也可以拖曳到其他更適當的位置，但為了繳交作業拍照方便，先拖曳到最前面。）



- 注意到[Repeat]勾選方塊已經加入，點選左上角的[Save]。

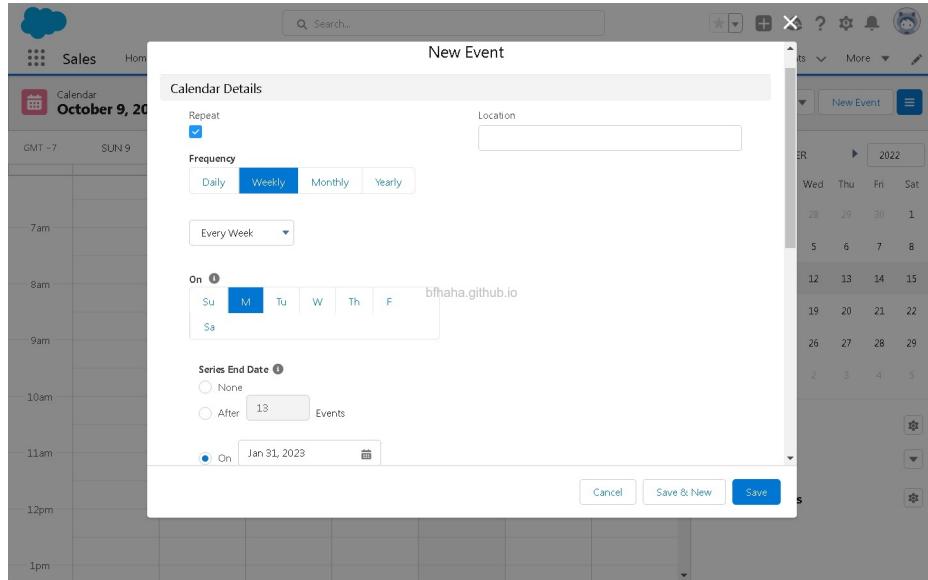


- 回到[New Event]，可以看到[Repeat]勾選方塊。

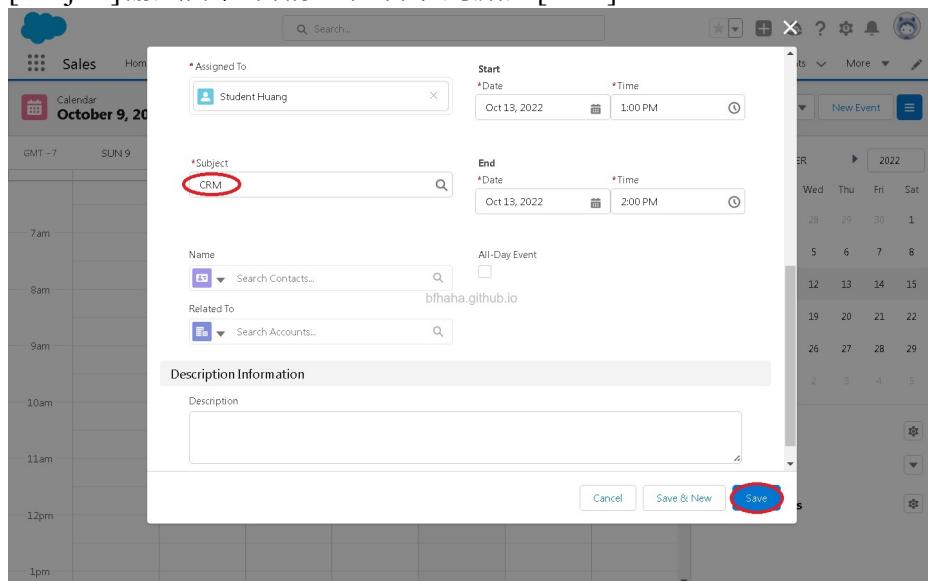


- 勾選[Repeat]，設定課程時間。注意到[Start]跟[End]選擇第一堂課的時間，時間格式中，12點相當0點。要刪除的話，點選該事件（不是點選游標停在上面時出現的[Edit]），點選右上角的向

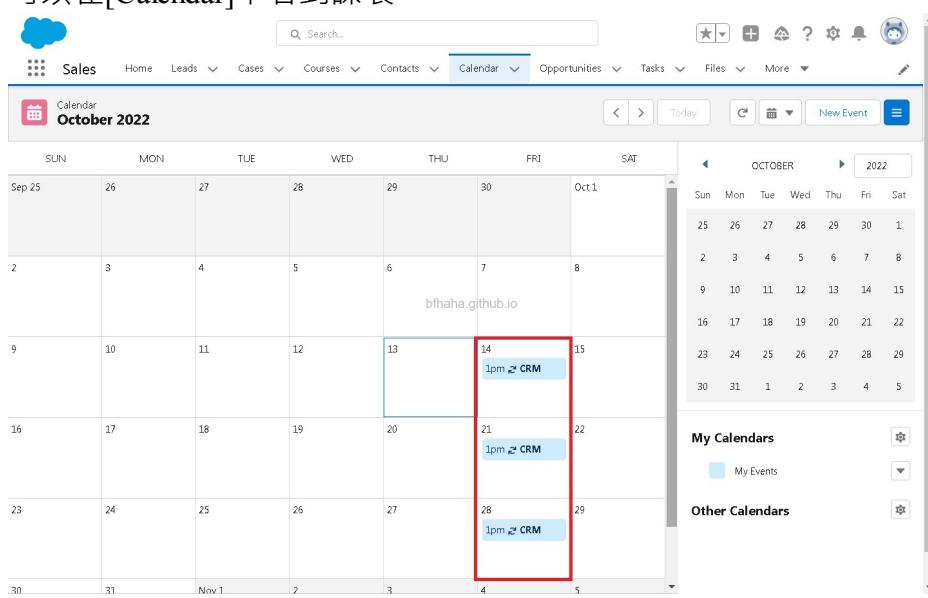
下箭頭，選擇[Delete]，再點選[Delete All Following]。



- [Subject]輸入課程名稱，在右下角點選[Save]。



- 可以在[Calendar]中看到課表。

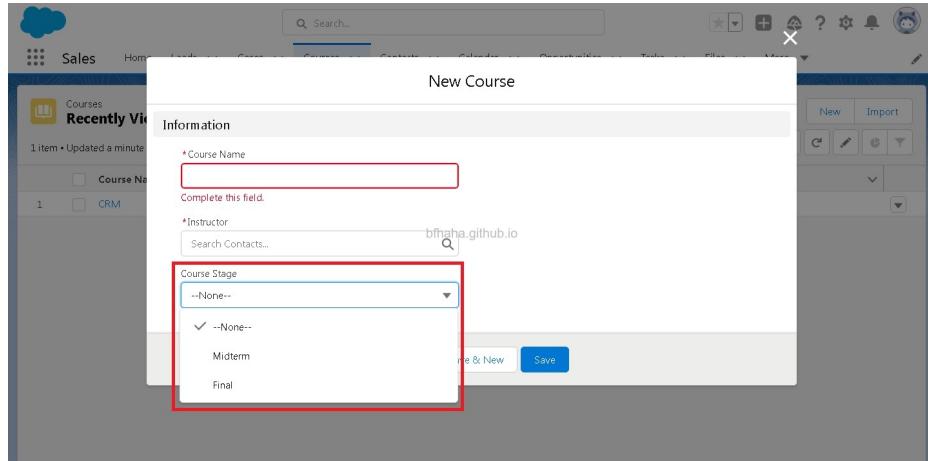


- 注意到在[Leads]或是[Opportunities]有進度條，這是個很棒的功能，我們也來自訂。

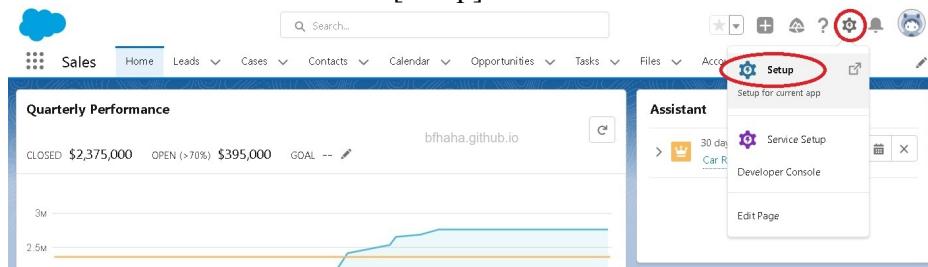
- 根據前面所學，為[Course]這個標籤加入一個名為[Course Stage]的欄位，類別為[Picklist]，選擇後點選右下角的[Next]。

- [Field Label]輸入Course Stage，[Values]輸入Midterm及Final，注意到用行來分隔。完成後點選[Next]，剩下的部分都按照預設即可。

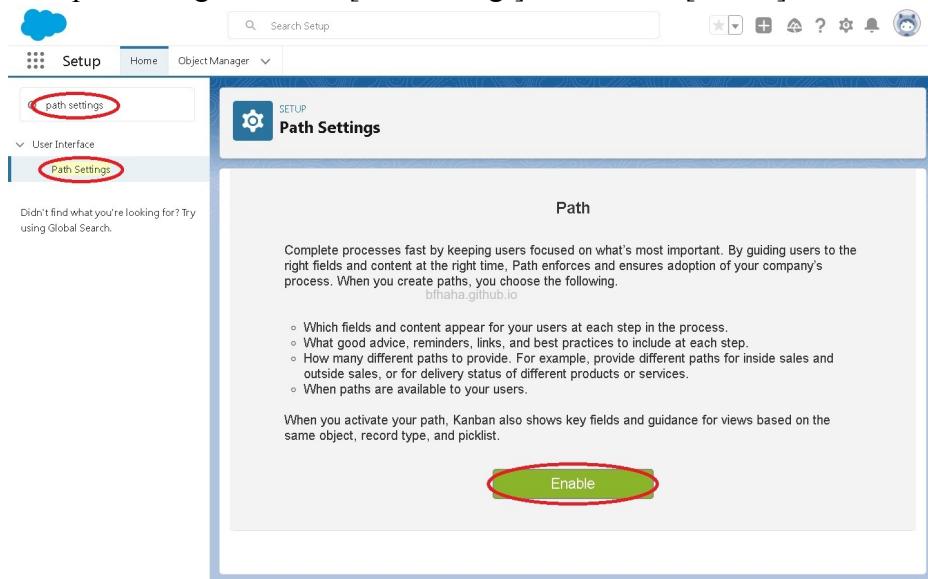
- 回到[Course]標籤，嘗試新增一筆記錄，可以看到多了[Course Stage]這個欄位提供選擇。



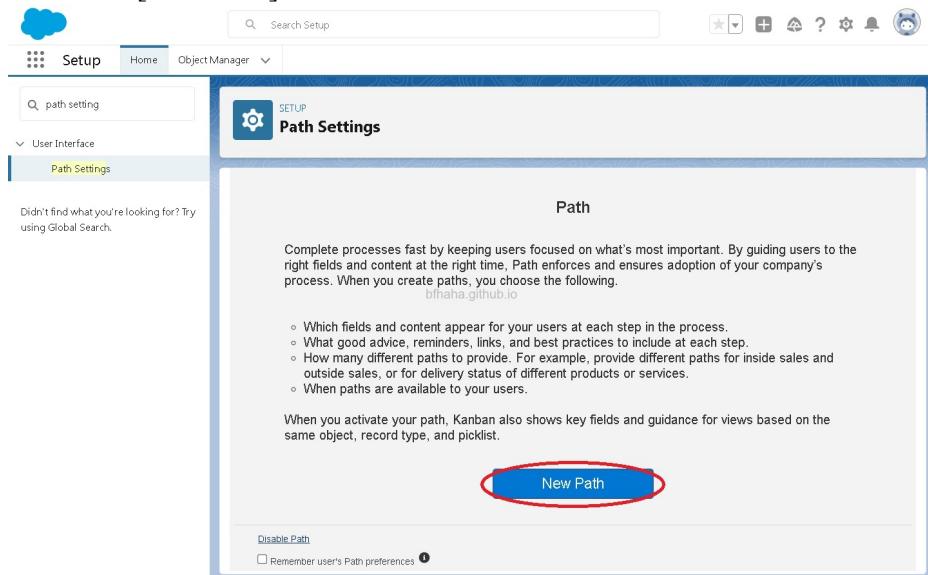
- 點選右上角齒輪圖示，選擇[Setup]。



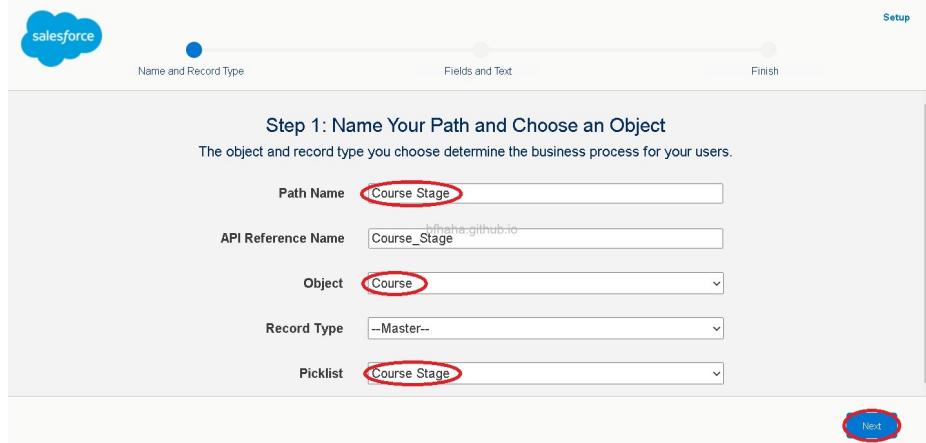
- 搜尋path settings，並點選[Path Settings]，接著點選[Enable]，開啟這個功能。



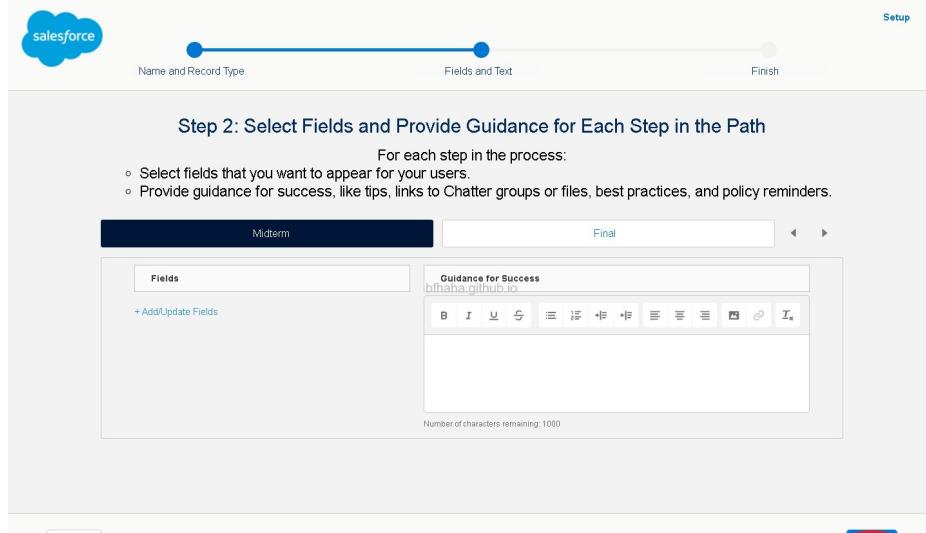
- 再來點選[New Path]。



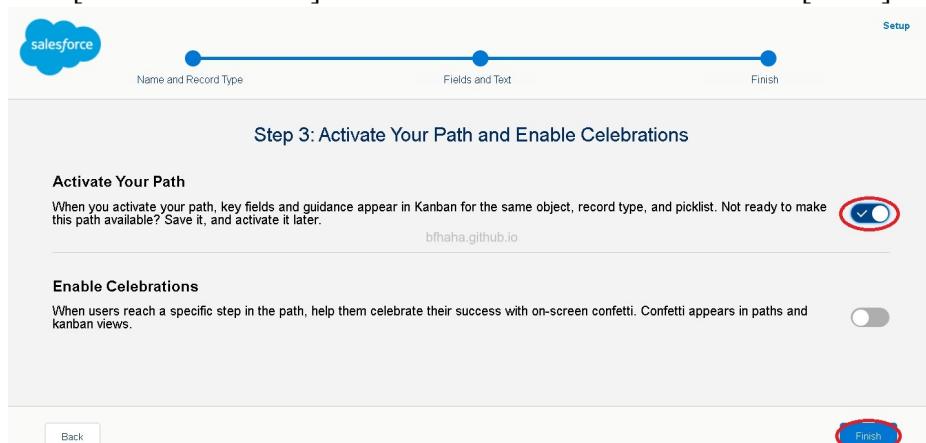
- [Path Name]一樣使用[Course Stage]，[Object]選擇[Course]，[Picklist]已經自動地選擇[Course]中的[Course Stage]欄位，點選右下角的[Next]。



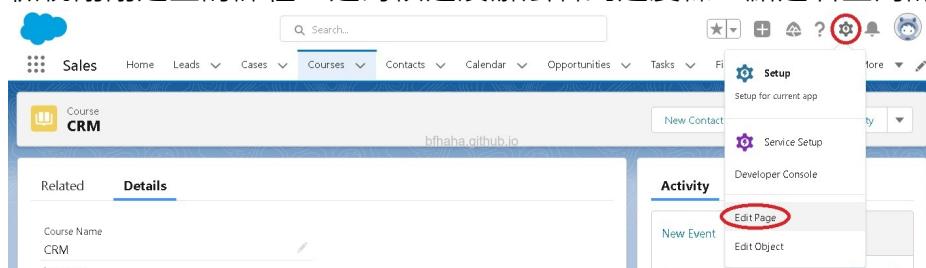
- 接下來可以對進度條做一些設定，但我們在這裡先保持預設就好，點選右下角的[Next]。



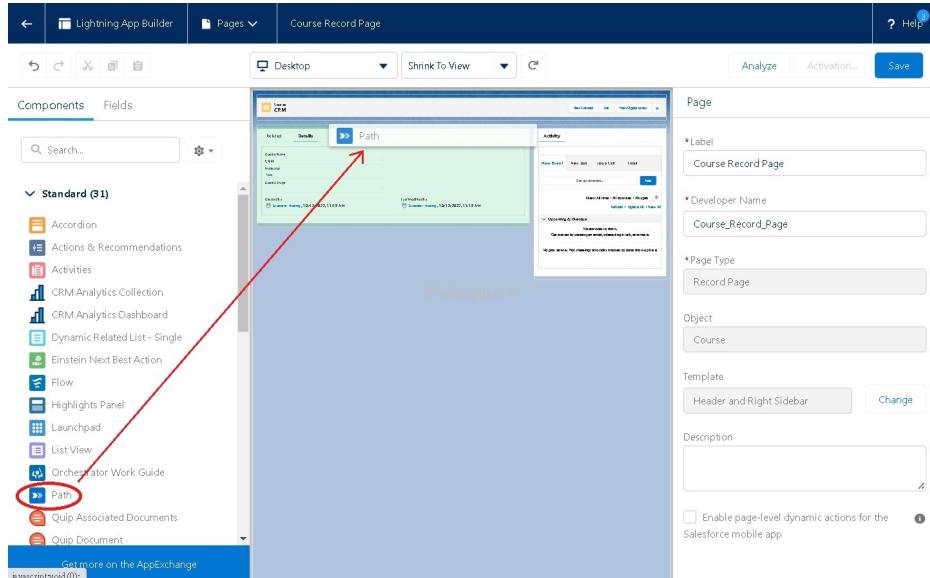
- 點選[Activate Your Path]，啟用這個進度條，點選右下角的[Finish]。



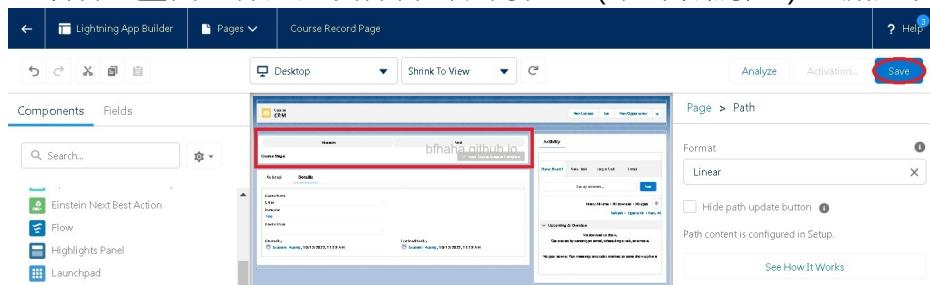
- 檢視剛剛建立的課程，這時候還沒辦法看到進度條，點選右上角的齒輪圖示，選擇[Edit Page]。



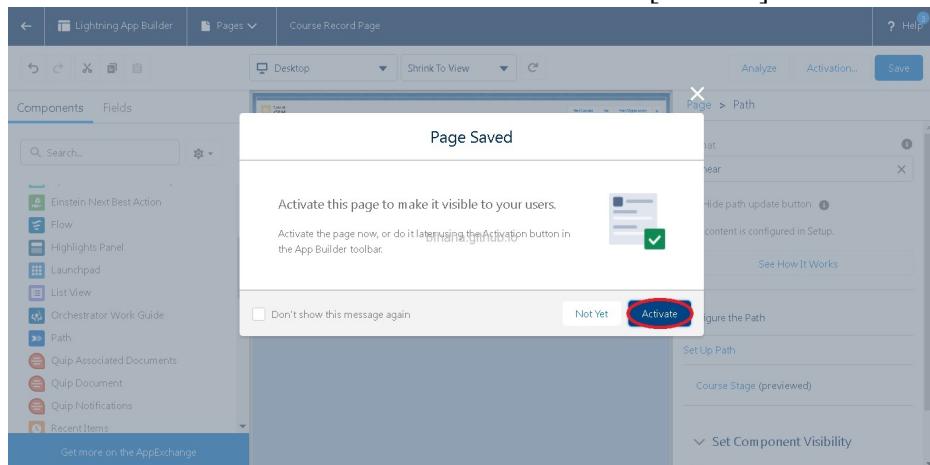
- 將左邊的[Path]，拖曳到課程資訊的區域。



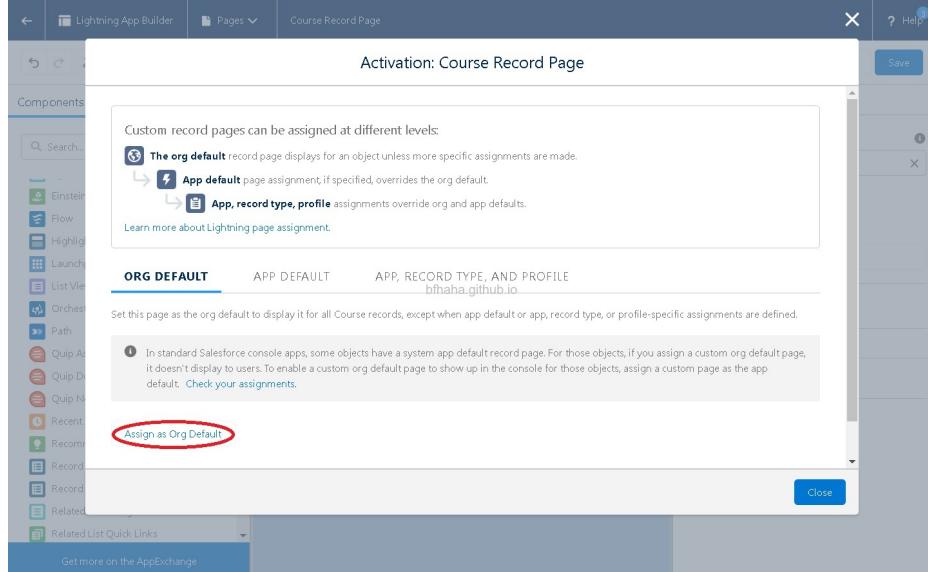
- 可以看到畫面上標注進度條會出現的位置（但不太清楚），點選右上角的[Save]。



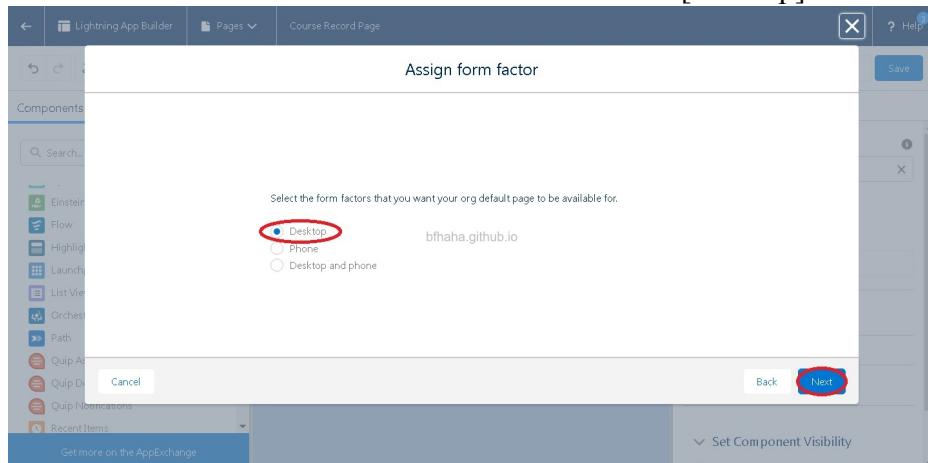
- 接著會跳出提示畫面，詢問是否要啟用，點選[Activate]。



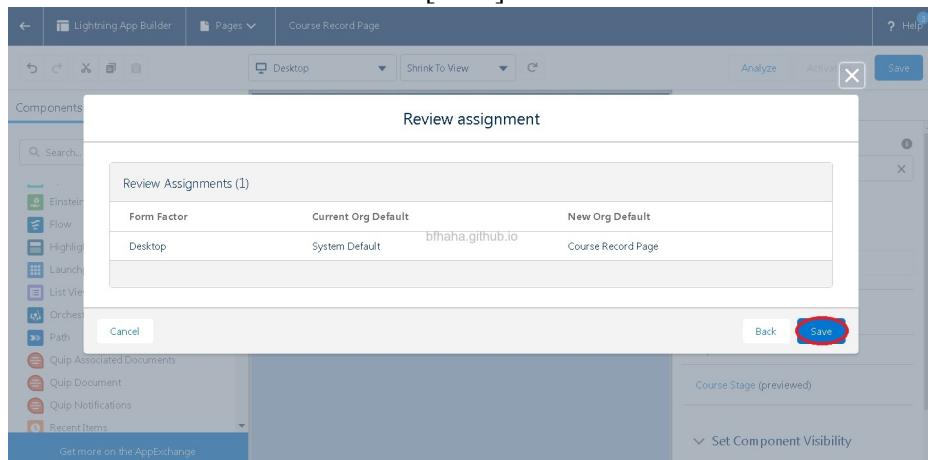
- 接著會詢問要套用這個設定的階層及範圍，點選[Assign as Org Default]。



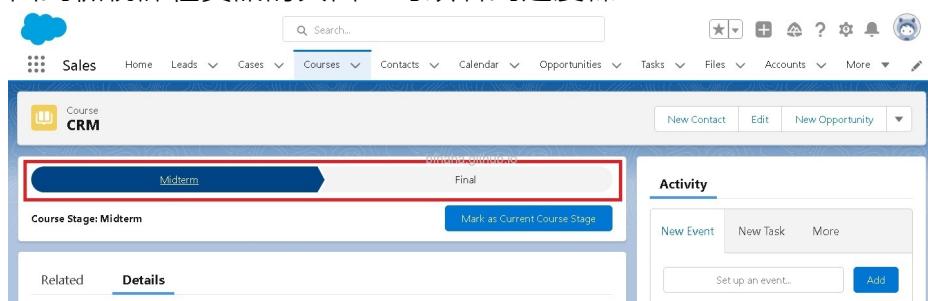
- 接著會詢問在哪一種媒體上顯示這個設定，選擇/Desktop/，接著點選右下角的[Next]。



- 最後會總結所做的設定，點選[Save]。



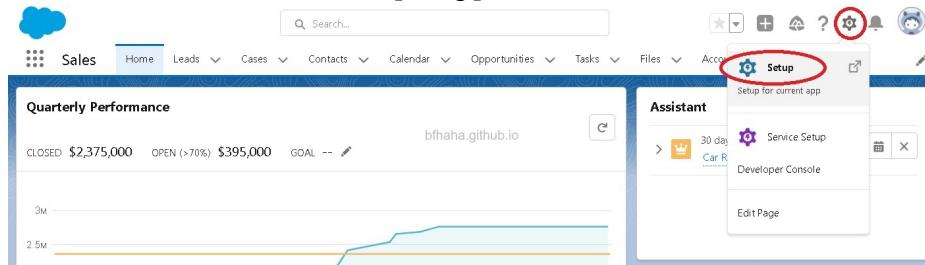
- 回到檢視課程資訊的頁面，可以看到進度條。



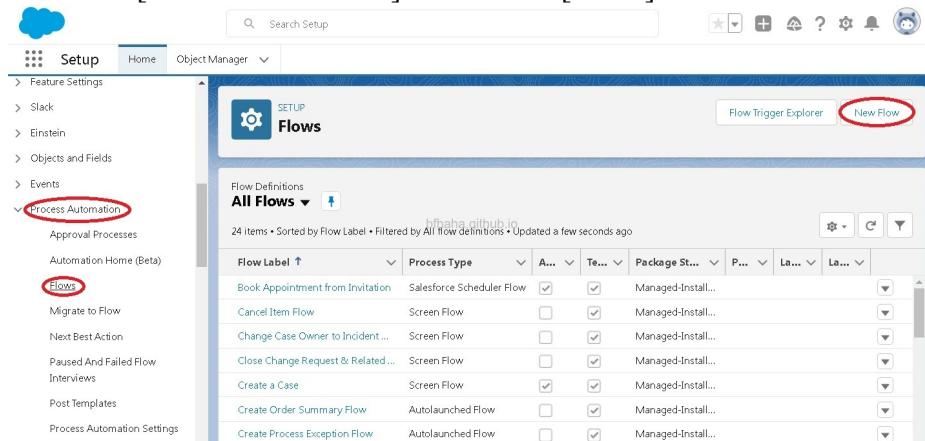
# 新增作業流程自動化

注意到我們剛剛“加入課程”跟“將課程時間加入行事曆”是分開的，我們現在要將這兩個動作自動化。

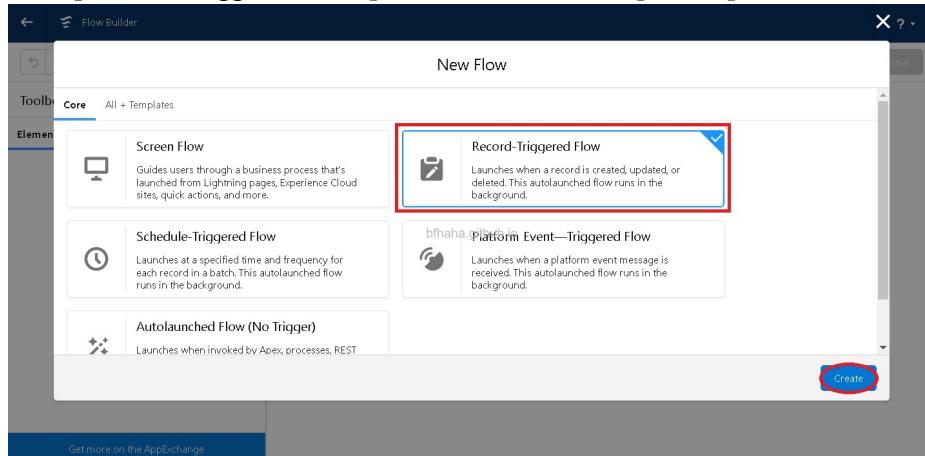
- 點選右上角齒輪圖示，選擇[Setup]。



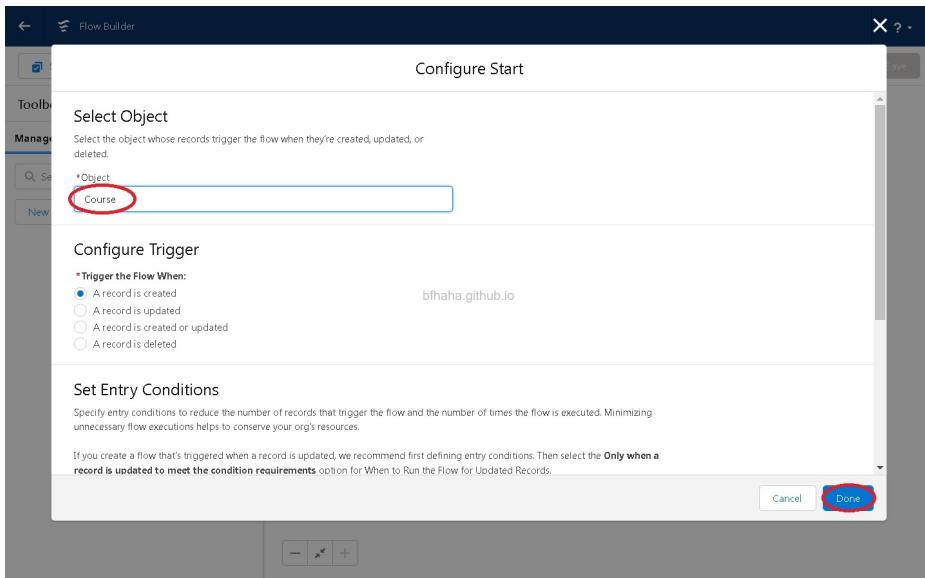
- 在左邊的[Process Automation]類別下點選[Flows]，接著點選右上角的[New Flow]。



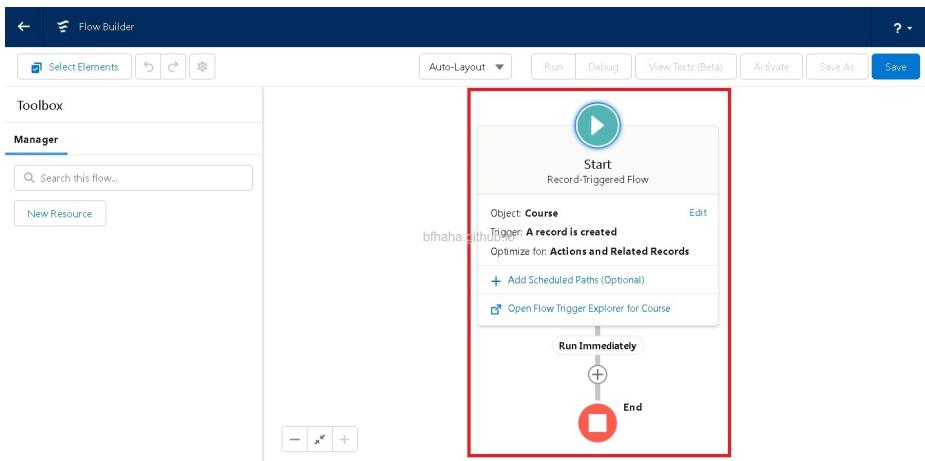
- 點選[Record-Triggered Flow]，再點選右下角的[Create]。



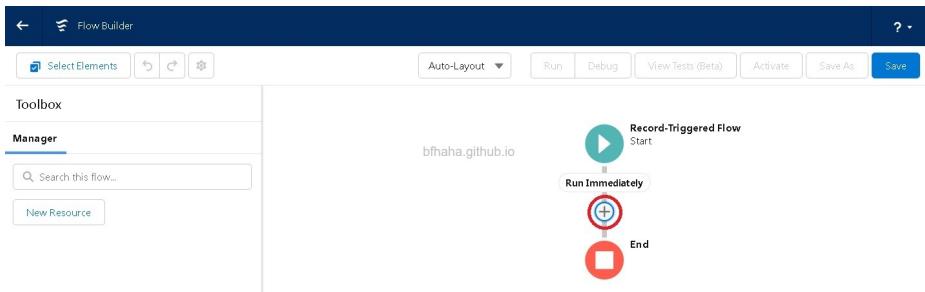
- 因為這個自動化流程是在新增一筆課程記錄時要被觸發，所以我們在[Object]輸入[Course]，接著點選右下角的[Done]。



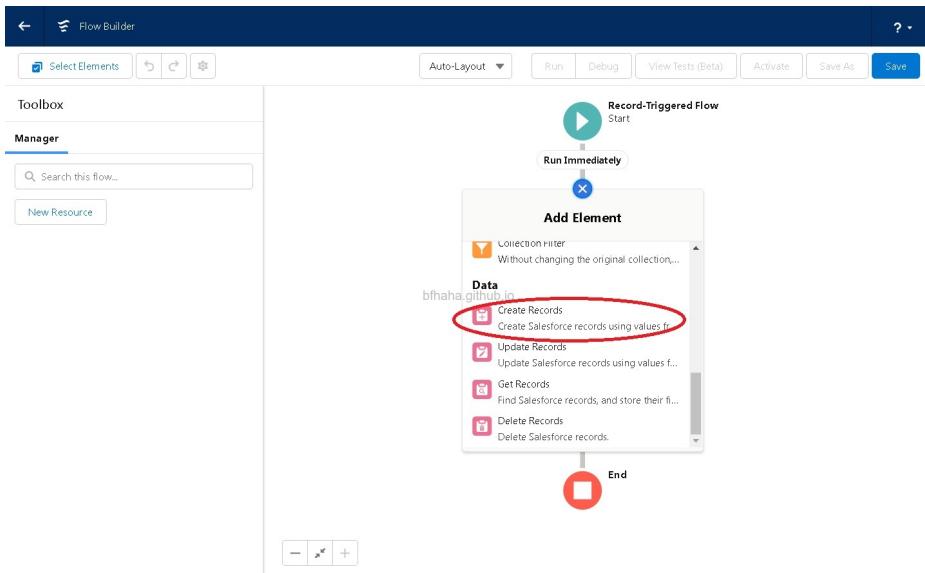
- 可以看到這個自動化流程的雛形。



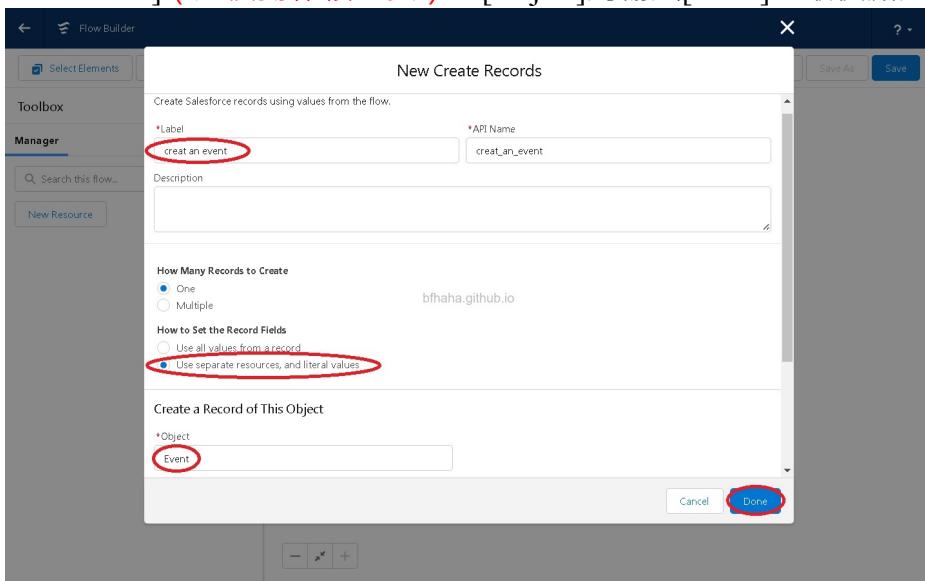
- 接著我們要設定這個自動化流程要做什麼動作，點選流程中的十字圖案。



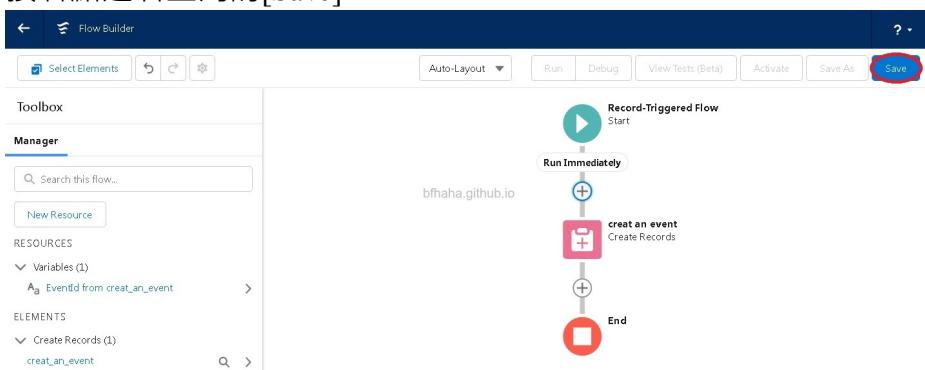
- 在跳出來選單中選擇[Create Records]，表示我們每新增一筆課程時，在事件中也要新增一筆記錄。



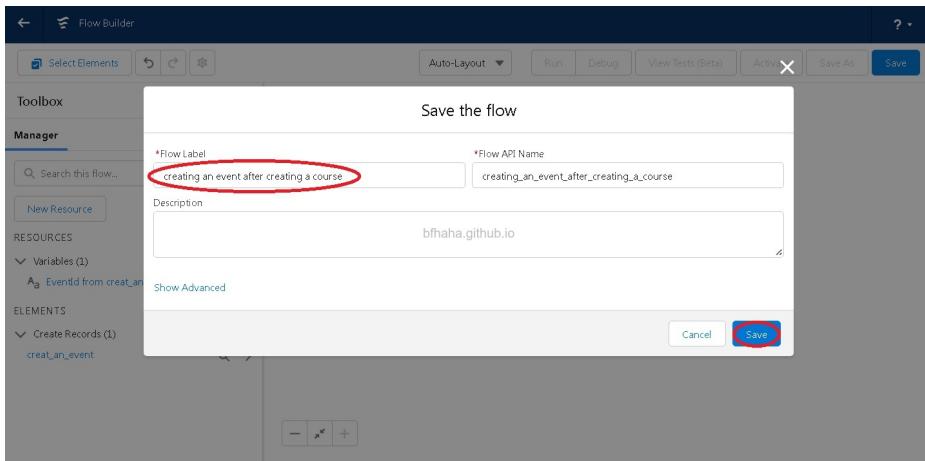
- 在[Label]中輸入這個動作的名稱，例如creating an event，接著要選擇[Use separate resources, and literal values]（這個動作很重要）。[Object]則輸入[Event]，最後點選右下角的[Done]。



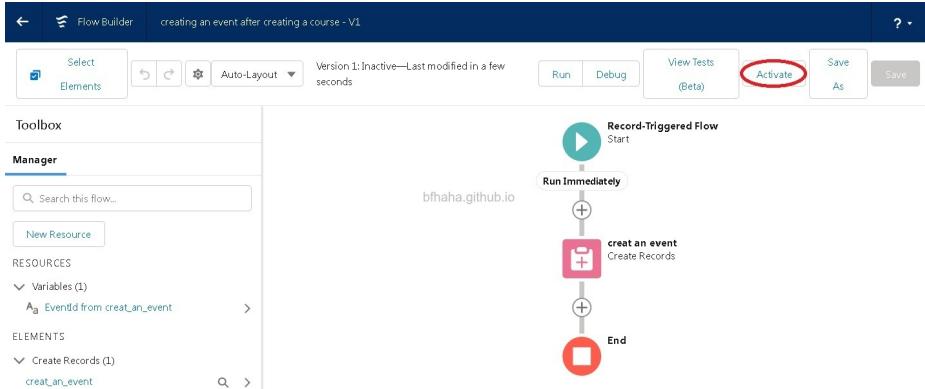
- 接著點選右上角的[Save]。



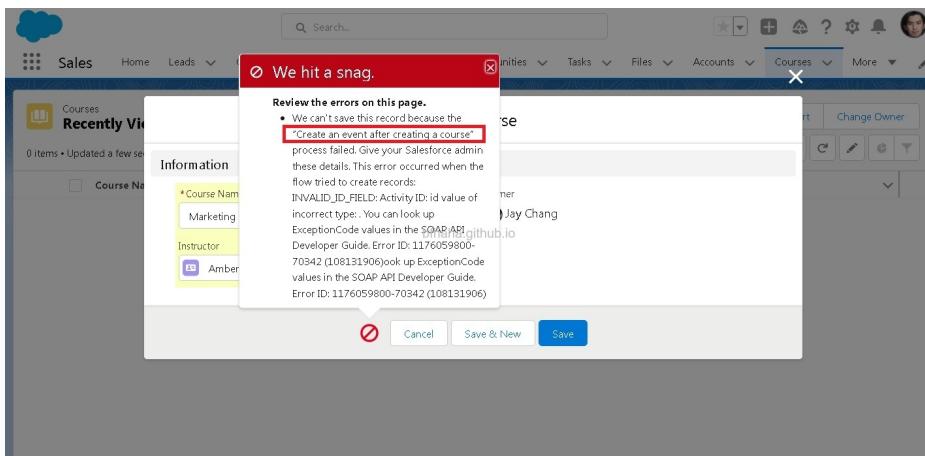
- 接著為這個自動化流程取一個名稱，例如creating an event after creating a course，完成後點選右下角的[Save]。



- 到這裡只是儲存了這個自動化流程，還要點選右上角的[Activate]才算啟用。

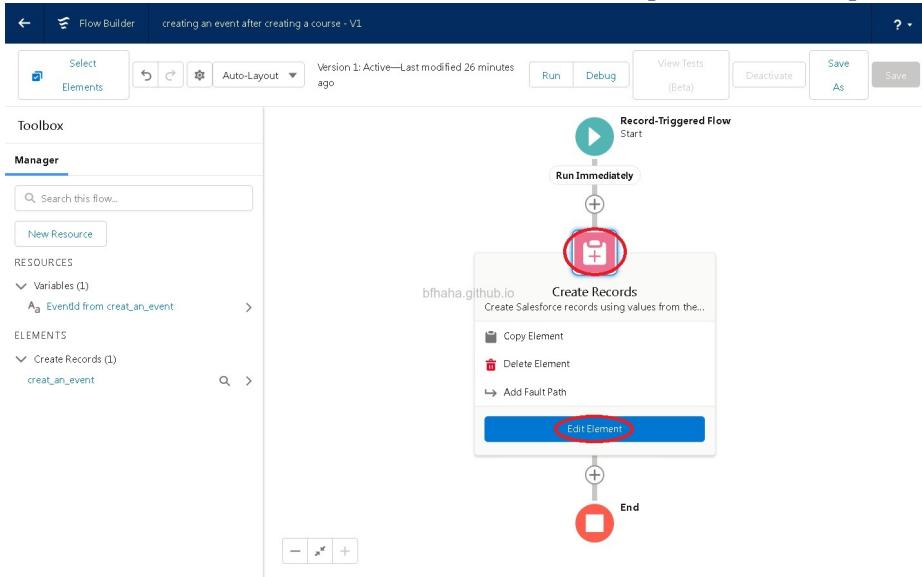


- 回到[Course]標籤，重新整理，新增一筆記錄，但會出現錯誤訊息，這並不令人意外，因為我們根本沒有設定課程的時間，自動化流程當然不知道在何時新增事件，我們現在來處理這個問題。

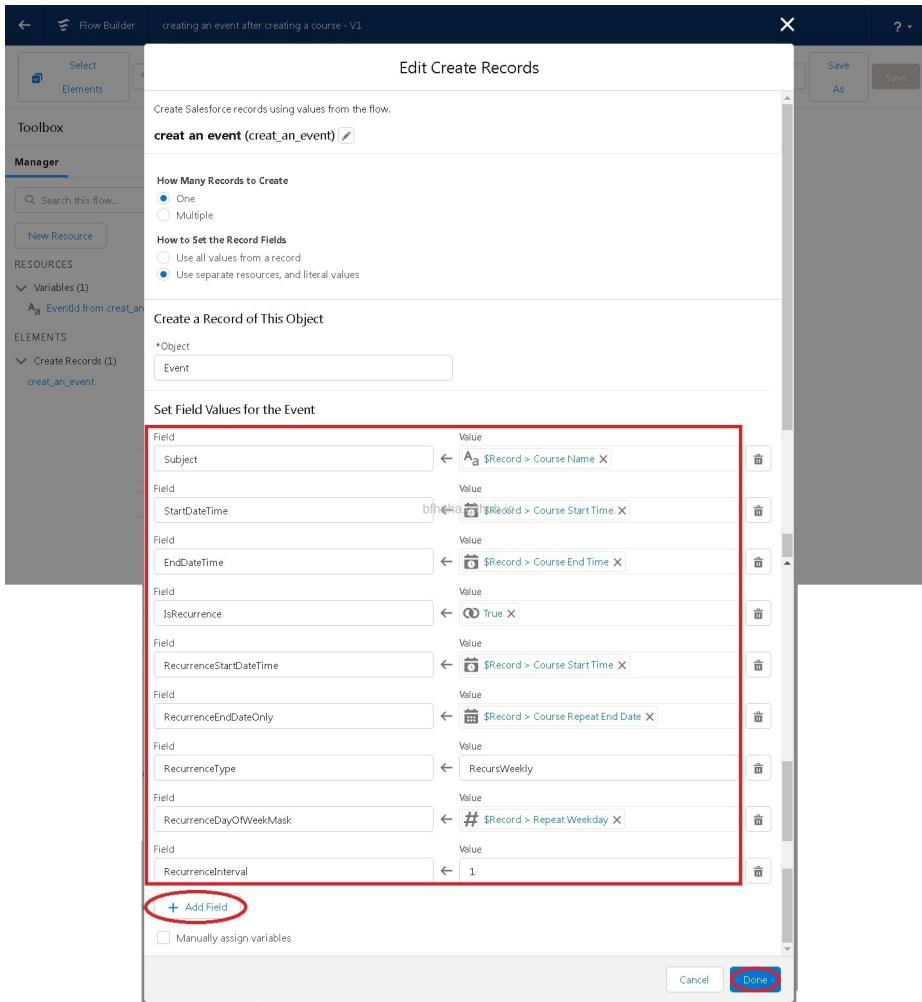


- 我們要在新增一筆課程的記錄時，也設定課程時間，也就是說，我們要在[Course]加入設定時間的欄位。參考之前加入欄位的方法，在[Course]這個標籤中加入下面幾個欄位。
  - Course Start Time ( 格式為Date/Time )
  - Course End Time ( 格式為Date/Time )
  - Course Repeat End Date ( 格式為Date )
  - Repeat Weekday ( 格式為Number，星期與數字的對照為Sun 1, Mon 2, Tue 4, Wed 8, Thu 16, Fri 32, Sat 64，如果有好幾天則將數字相加，**考考同學，有同學知道為什麼要用2的次方嗎？** )

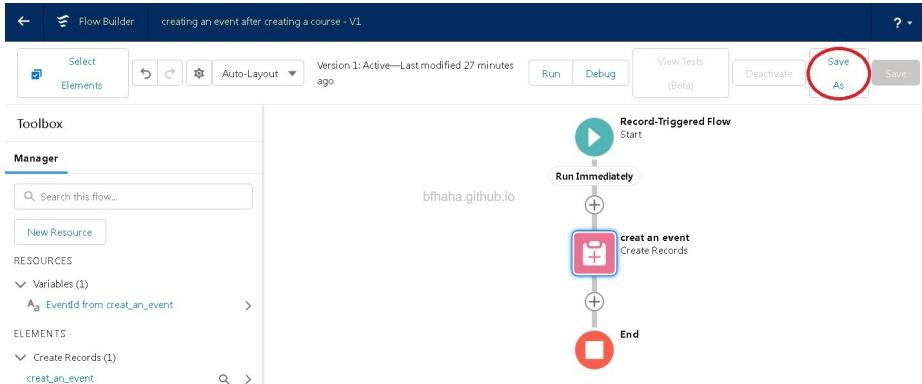
- 回到自動化流程圖，點選剛剛的動作，也就是[Create Records]，再選擇[Edit Element]。



- 點選[Add Field]，依序加入下面的欄位，並設定其指向，完成後點選右下角的[Done]。
  - Subject <-- {!\$Record.Name}
  - StartTime <-- {!\$Record.Course\_Start\_Time\_\_c}
  - EndTime <-- {!\$Record.Course\_End\_Time\_\_c}
  - IsRecurrence <-- {!\$GlobalConstant.True}
  - RecurrenceStartTime <-- 與StartTime相同
  - RecurrenceEndDateOnly <-- {!\$Record.Course\_Repeat\_End\_Date\_\_c}
  - RecurrenceType <-- RecursWeekly
  - RecurrenceDayOfWeekMask <-- {!\$Record.Repeat\_Weekday\_\_c}
  - RecurrenceInterval <-- 1 (表示1周重複一次)



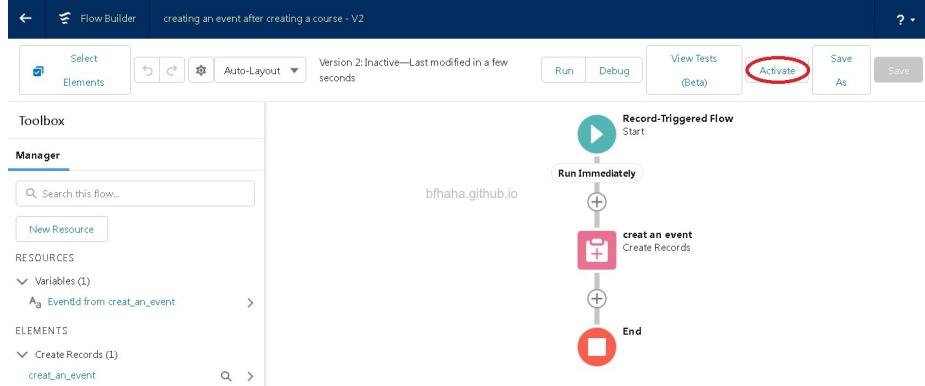
- 點選右上角的[Save As]。



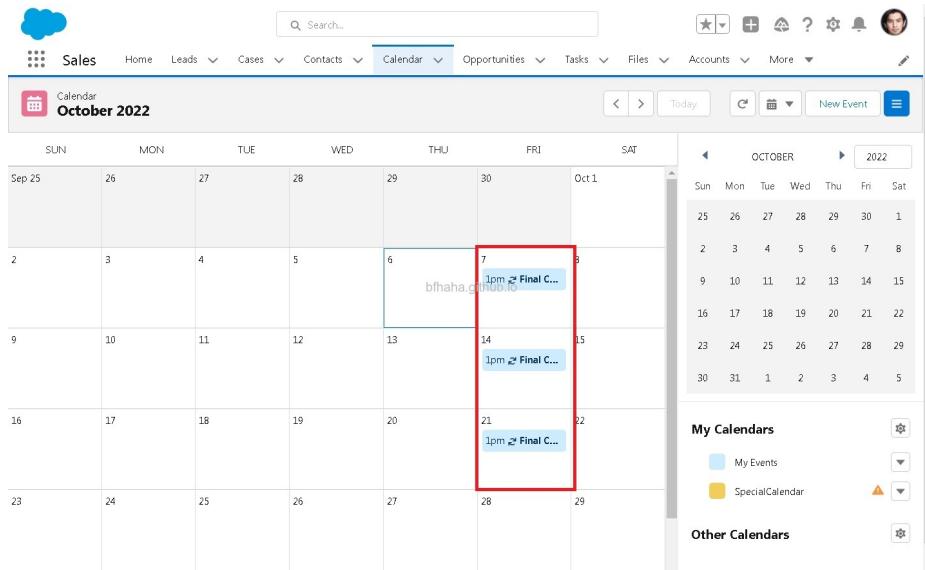
- 在跳出來的提示畫面中選擇[A New Version]，再點選右下角的[Save]。

*Flow Label	*Flow API Name
creating an event after creating a course	creating_an_event_after_creating_a_course
Description	
bfhaha.github.io	

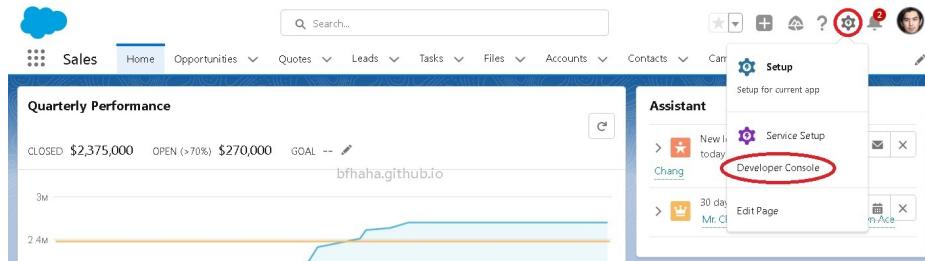
- 記得最後還要再次點選[Activate]才算啟用。



- 回到[Course]標籤，重新整理後，新增一門課程並設定時間，Salesforce即會在行事曆新增課程時間。



- 透過這種方式新增的事件，手動的話只能一筆一筆刪除，如果要一次全部刪除的話，要利用資料庫的指令，作法如下。點選右上角的齒輪，選擇[Developer Console]。



- 點選下方的[Query Editor]，可以透過執行SQL指令來尋找記錄。輸入SELECT Id, Subject FROM Event，再點選下方的[Execute]，上方就會列出所有事件。按住Shift可以選取多筆記錄，選取要

刪除的事件後，點選[Delete Row]刪除多個事件。

The screenshot shows the Salesforce Developer Console interface. At the top, there's a navigation bar with links like File, Edit, Debug, Test, Workspace, Help, and a timestamp of Event@11:30 PM. Below the navigation bar is a query editor window with the URL salesforce.com/\_ui/common/apex/debug/ApexCSIPage.

The main area displays a query result grid titled "Query Results - Total Rows: 9". The grid has two columns: "Id" and "Subject". A red box highlights the first few rows of the grid. Below the grid is a toolbar with buttons for Save Rows, Insert Row, Delete Row (which is circled in red), Refresh Grid, and Access in Salesforce: Create New, Open Detail Page, Edit Page.

Below the toolbar is a navigation bar with tabs: Logs, Tests, Checkpoints, Query Editor (which is circled in red), View State, Progress, and Problems. The "Query Editor" tab is active, showing the query "SELECT Id, Subject FROM Event" entered into the text area. A message below the query says "Any query errors will appear here...".

At the bottom left of the main area is an "Execute" button (circled in red) and a checkbox for "Use Tooling API". On the right side, there's a "History" panel showing the executed queries: "SELECT Subject FROM Event" and "SELECT Id, Subject FROM Event".