

Set Up Rules for Accrual Processing

1. Define Accrual Rules

Step 1: Sign Up for Developer Edition Org

1. Go to the Signup Page

- Open your browser and navigate to [Salesforce Developer Edition Signup](#).

2. Fill Out the Signup Form

- Enter the following details:
 - **First Name**
 - **Last Name**
 - **Email Address** (Use an active email ID)
 - **Company Name** (You can enter "Self" or your organization name)
 - **Country**
 - **Postal Code**
 - **Username** (Must be unique and in an email format, e.g., yourname@lm4ever.com)

3. Click "Sign me up"

- A confirmation message appears, indicating that a verification email has been sent.

4. Verify Your Account

- Open the activation email from Salesforce.
- Click "**Verify Account**" in the email.

5. Set Your Password

- Choose a secure password.
- Set a security question and answer.
- Click **Save** to complete the registration.

6. Note Down Your Credentials

- Username
- Password

- Login URL (<https://login.salesforce.com>)

Step 2: Connect Your Developer Edition Org to Trailhead

1. Log in to Trailhead

- Go to [Trailhead](#) and sign in.

2. Navigate to the Challenge Section

- Scroll down to the **Challenge** section on the Trailhead module page.

3. Click on Playground Name → Connect Org

- From the dropdown, select **"Connect Org"**.

4. Log in with Your Developer Edition Credentials

- Enter the username and password created in Step 1.
- Click **Login**.

5. Grant Access

- On the **"Allow Access?"** screen, click **Allow**.

6. Confirm Connection

- When prompted, click **"Yes! Save it"** to connect your Developer Edition org to Trailhead.

Step 3: Verify Successful Connection

1. Go to **Trailhead Profile > Hands-on Orgs**.
2. Ensure that your **Loyalty Management Developer Edition Org** is listed and marked as connected.
3. You are now ready to proceed with the **accrual process setup**.

4.

2. Create a Flow for Purchases

Step 1: Create a New Flow

1. Navigate to Setup

- Click Setup and select Setup.
- In the Quick Find box, type Flows and select Flows.

2. Create a New Flow

- Click New Flow.
- Ensure Start from Scratch is selected.
- Click Next.

3. Select Flow Type

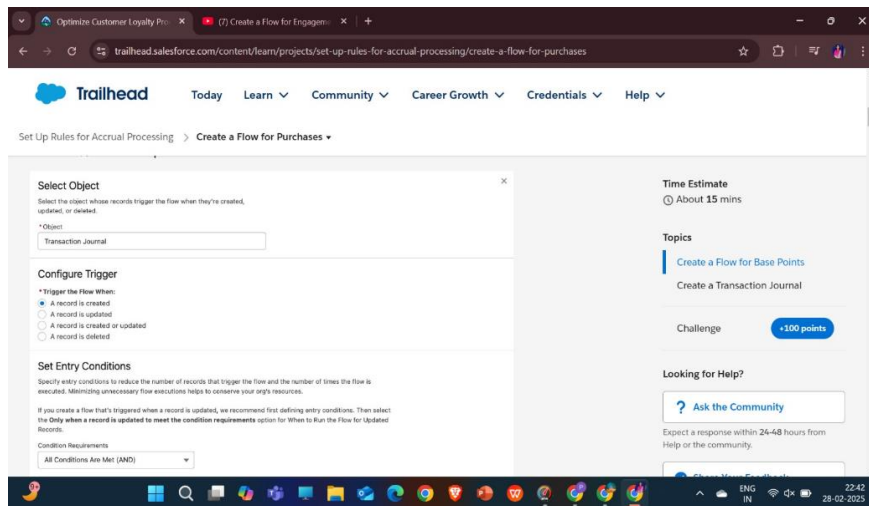
- Choose Record-Triggered Flow.
- Click Create.

4. Define Flow Trigger

- Object: Transaction Journal
- Configure Trigger: A record is created
- Condition Requirements: All Conditions Are Met (AND)
 - Field: Status
 - Operator: Equals
 - Value: Pending
- Optimize Flow For: Actions and Related Records
- Click Close.

5. Change Layout

- In the button bar, switch from Auto-Layout to Free-Form.



Step 2: Create Flow Resources

1. Open the Manager Tab

- Click New Resource.

2. Create Transaction Amount Variable

- Resource Type: Variable
- API Name: TransactionAmount
- Data Type: Number
- Decimal Places: 2
- Default Value: Triggering TransactionJournal > Transaction Amount
- Click Done.

3. Create Additional Resources

- Repeat steps 1-2 for the following:
 - Multiplier
 - Resource Type: Variable
 - Data Type: Number
 - Decimal Places: 2
 - BasePointsToCredit
 - Resource Type: Formula
 - Formula: `{!TransactionAmount} * {!Multiplier}`
 - Data Type: Number

- **Decimal Places: 2**

Step 3: Define Business Rules

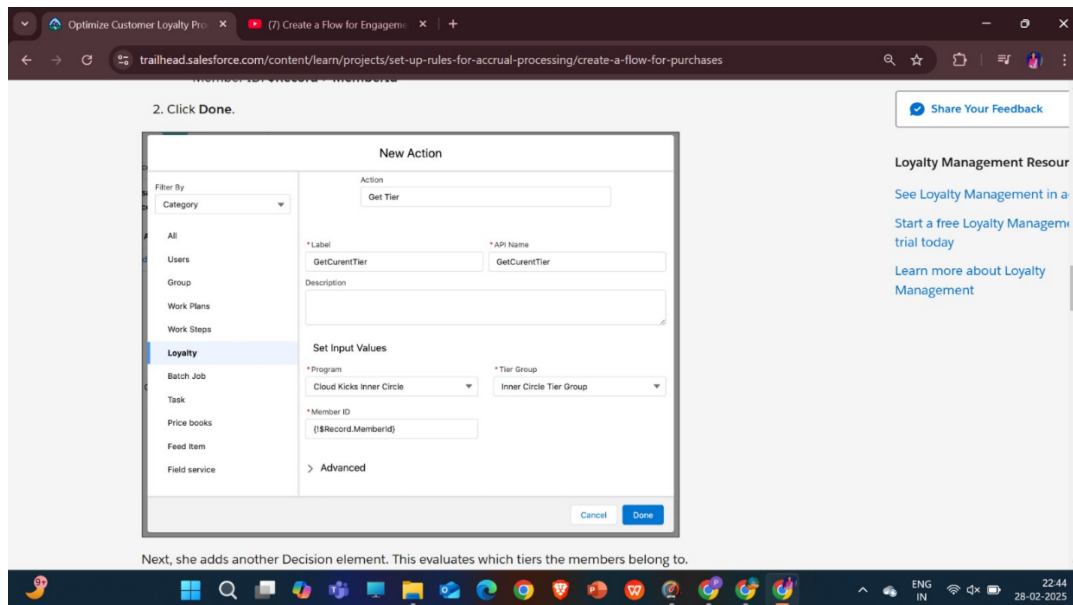
1. Add Decision Element

- **Drag the Decision element onto the canvas.**
- **Label: CheckEntryConditions**
- **Outcome Details:**
 - **Label: EntryConditions**
 - **Condition Requirements: All Conditions Are Met (AND)**
 - **Resource: Triggering TransactionJournal > Loyalty Program > Name**
 - **Operator: Equals**
 - **Value: Cloud Kicks Inner Circle**
 - **Add Condition**
 - **Resource: Triggering TransactionJournal > Journal Type > Name**
 - **Operator: Equals**
 - **Value: Accrual**
 - **Add Condition**
 - **Resource: Triggering TransactionJournal > Journal Subtype > Name**
 - **Operator: Equals**
 - **Value: Purchase**
- **Click Done.**

2. Get Member Tier Information

- **Drag the Action element onto the canvas.**
- **Filter by: Loyalty**
- **Action: Get Tier**
- **Label: GetCurrentTier**
- **Values:**
 - **Program: Cloud Kicks Inner Circle**
 - **Tier Group: Inner Circle Tier Group**

- **Member ID: \$Record > MemberId**
- **Click Done.**



3. Evaluate Member Tier

- **Drag the Decision element onto the canvas.**
- **Label: CheckCurrentTier**
- **Create Outcomes:**

1. PlatinumAndDiamond

- **Condition Requirements: Any Condition Is Met (OR)**
- **Resource: Outputs from GetCurrentTier > TierName**
- **Operator: Equals**
- **Value: Platinum**
- **Add Condition: Diamond**

2. GoldAndSilver

- **Condition Requirements: Any Condition Is Met (OR)**
- **Resource: Outputs from GetCurrentTier > TierName**
- **Operator: Equals**
- **Value: Gold**
- **Add Condition: Silver**

- Click Done.

5. Click Done.

New Decision

*Label: *API Name:

Description:

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER

OUTCOME DETAILS

*Label: *Outcome API Name:

Condition Requirements to Execute Outcome:

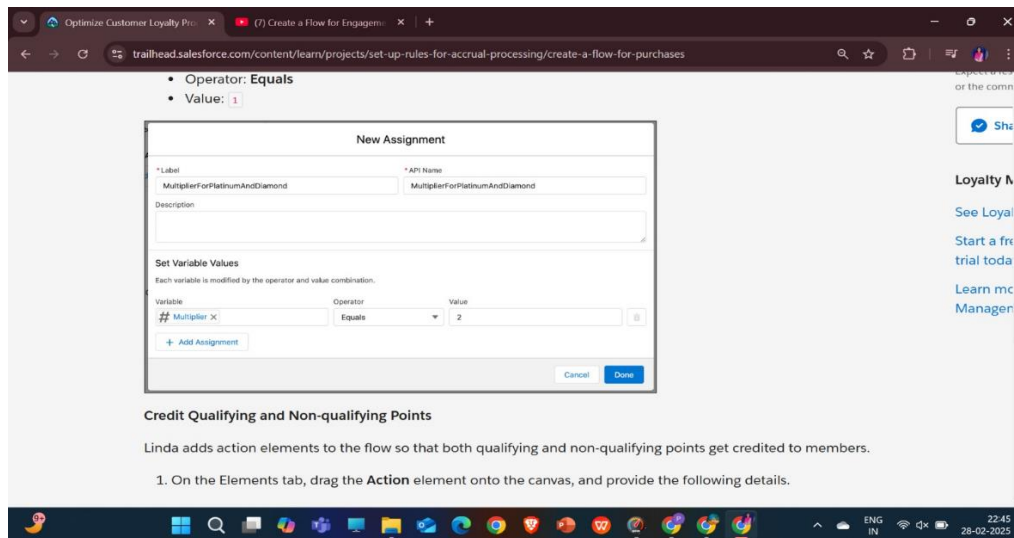
Resource: Operator: Value:

OR Operator: Value:

Linda then adds the Assignment element to assign a value to the variable. This element assigns the multiplier resource to each tier. Depending on which tier the member falls in, the points get multiplied. For example, if the member belongs to

4. Assign Multipliers

- Drag the Assignment element onto the canvas.
- Label: MultiplierForPlatinumAndDiamond
 - Variable: Multiplier
 - Operator: Equals
 - Value: 2
- Click Done.
- Repeat for Gold and Silver Tiers:
 - Label: MultiplierForGoldAndSilver
 - Value: 1
- Click Done.



Step 4: Credit Points

1. Credit Non-Qualifying Points

- Drag the Action element onto the canvas.
- Filter by: Loyalty
- Action: Credit Points
- Label: CreditNonQualifyingPoints
- Values:
 - Program: Cloud Kicks Inner Circle
 - Currency Type: Regular Points
 - Recipient Member ID: \$Record > MemberId
 - Number of Points to Credit: BasePointsToCredit
 - Journal ID: \$Record > Id
- Click Done.

2. Credit Qualifying Points

- Drag another Action element onto the canvas.
- Filter by: Loyalty
- Action: Credit Points
- Label: CreditQualifyingPoints
- Values:

- **Program:** Cloud Kicks Inner Circle
- **Currency Type:** Tier Points
- **Recipient Member ID:** \$Record > MemberId
- **Number of Points to Credit:** \$Record > TransactionAmount
- **Journal ID:** \$Record > Id
- **Click Done.**

The screenshot shows a web browser window with the URL trailhead.salesforce.com/content/learn/projects/set-up-rules-for-accrual-processing/create-a-flow-for-purchases. The interface displays the 'New Action' configuration for 'Credit Points'. On the left, a sidebar lists various categories: Filter By, Category, All, Users, Group, Work Plans, Work Steps, Loyalty (highlighted), Task, Price books, Feed Item, Field service, and Data Processing Engine. The main area is titled 'New Action' and contains the following fields:

- Action:** Credit Points
- * Label:** CreditNonQualifyingPoints
- * API Name:** CreditNonQualifyingPoints
- Description:** (empty text area)
- Set Input Values:**
 - * Program:** Cloud Kicks Inner Circle
 - * Currency Type:** Regular Points
 - * Recipient Member ID:** (\$Record.MemberId)
 - * Number of Points to Credit:** (\$BasePointsToCredit)
 - * Journal ID:** (\$Record.Id)
 - Correlation ID:** (Enter a Correlation ID or search resource)
 - Promotion ID:** (Enter a Promotion ID or search resource)
 - Notes:** (Enter notes or search resources)
- Advanced:** (expandable section)

At the bottom right of the configuration area are 'Cancel' and 'Done' buttons. The Windows taskbar is visible at the bottom of the screen.

Step 5: Connect Flow Elements

Connect the elements in the following order:

1. Start → CheckEntryConditions (Decision)
2. CheckEntryConditions → GetCurrentTier (Action) [If EntryConditions Met]
3. GetCurrentTier → CheckCurrentTier (Decision)
4. CheckCurrentTier → MultiplierForPlatinumAndDiamond (Assignment) [If Platinum or Diamond]
5. CheckCurrentTier → MultiplierForGoldAndSilver (Assignment) [If Gold or Silver]
6. Assignment (Multiplier) → CreditNonQualifyingPoints (Action)
7. CreditNonQualifyingPoints → CreditQualifyingPoints (Action)

Step 6: Save and Activate

1. Click Save.

2. **Flow Label: InnerCircleAccrualFlow**

3. **Click Save.**

4. **Click Activate.**

Step 7: Test the Flow

Create a Transaction Journal

1. **Navigate to Loyalty Programs.**

2. **Select Cloud Kicks Inner Circle.**

3. **Click the Members And Partners tab.**

4. **Under Loyalty Program Members, select CL001.**

As soon as the record is created, the transaction journal status changes to Processed, and the Loyalty Ledgers card is updated with the points.

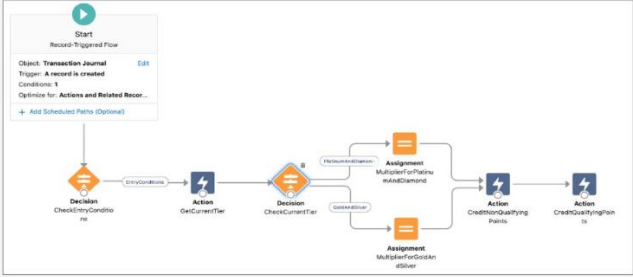
5. **In the Transaction Journals section, click New.**

6. **Enter the following details:**

- **Journal Type: Accrual**
- **Journal Subtype: Purchase**
- **Activity Date: Current Date**
- **Journal Date: Current Date**
- **Status: Pending**
- **Loyalty Program: Cloud Kicks Inner Circle**
- **Transaction Amount: 100**

7. Click Save

2. Click **Save**.
3. Enter the Flow Label: `InnerCircleAccrualFlow`
4. Click **Save**.
5. Click **Activate**.



The flow diagram starts with a 'Start' event (Record-Triggered Flow) for 'Transaction Journal'. It then proceeds to a 'Decision' node labeled 'CheckTierCondition'. This leads to an 'Action' node 'GetCurrentTier'. Another 'Decision' node 'CheckCurrentTier' follows. From here, the flow branches into two paths: one for 'Non-qualifying' leading to an 'Assignment' node 'MultiplyPointsAndAddDiamond', and another for 'Qualifying' leading to an 'Assignment' node 'MultiplyPointsAndAddDiamond'. Both paths then lead to an 'Action' node 'CreateQualifyingPoints' and finally to an 'Action' node 'CreditFlowingPoints'.

This flow will run every time a transaction journal record is created. The flow will check the tier that the member belongs to, calculate the points based on the tier, and credit the qualifying and non-qualifying points.

Create a Transaction Journal

3. Create a Flow for Engagement Activities

Step 1: Modify the Engagement Activities Flow

1. Open the Existing Flow

- 1. Click Setup, then select Setup.**
- 2. In the Quick Find box, type Flows and select Flows.**
- 3. Locate and select InnerCircleAccrualForEngagementActivities.**

2. Add the Credit Points Action

1. Credit Non-Qualifying Points

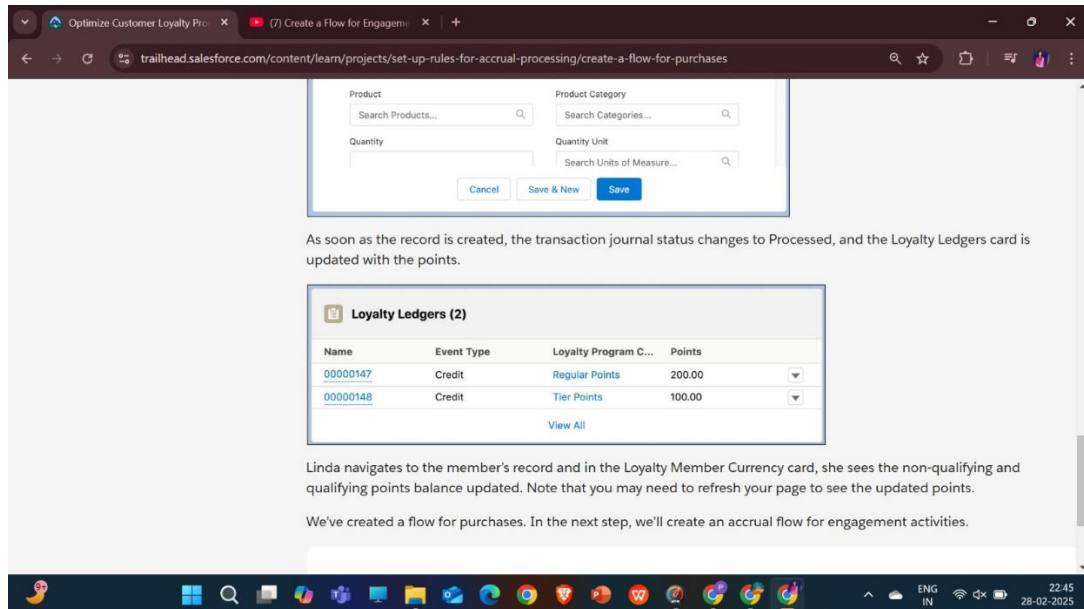
- 1. On the Elements tab, drag the Action element onto the canvas.**
- 2. Provide the following details:**
 - **Filter by: Loyalty**
 - **Action: Credit Points**
 - **Label: CreditNonQualifyingPoints**
 - **Program: Cloud Kicks Inner Circle**
 - **Currency Type: Regular Points**
 - **Recipient Member ID: Transaction Journal from GetTransactionJournals > MemberId**
 - **Number of Points to Credit: PointsToCredit**
 - **Journal ID: Transaction Journal from GetTransactionJournals > Id**
- 3. Click Done.**

2. Credit Qualifying Points

- 1. Drag another Action element onto the canvas.**
- 2. Provide the following details:**
 - **Filter by: Loyalty**
 - **Action: Credit Points**
 - **Label: CreditQualifyingPoints**
 - **Program: Cloud Kicks Inner Circle**
 - **Currency Type: Tier Points**

- **Recipient Member ID: Transaction Journal from GetTransactionJournals > MemberId**
- **Number of Points to Credit: 10**
- **Journal ID: Transaction Journal from GetTransactionJournals > Id**

3. Click Done.



3. Connect the Flow Elements

Connect the elements in the following order:

1. Start → GetTransactionJournals (Get Records)
2. GetTransactionJournals → CheckJournalSubType (Decision)
3. CheckJournalSubType → AssignmentForAppDownload (Assignment) [If App Download]
4. CheckJournalSubType → AssignmentForCustomerSurvey (Assignment) [If Customer Survey]
5. CheckJournalSubType → AssignmentForSocialMediaActivity (Assignment) [If Social Media Activity]
6. All three Assignment elements → CreditNonQualifyingPoints (Action)
7. CreditNonQualifyingPoints → CreditQualifyingPoints (Action)

4. Save & Activate the Flow

1. Click Save.
 - **Flow Label: InnerCircleAccrualForEngagementActivities**

2. Click Save again.
3. Click Activate.

This flow ensures that engagement transactions (e.g., app downloads, customer surveys, and social media activities) credit both qualifying and non-qualifying points.

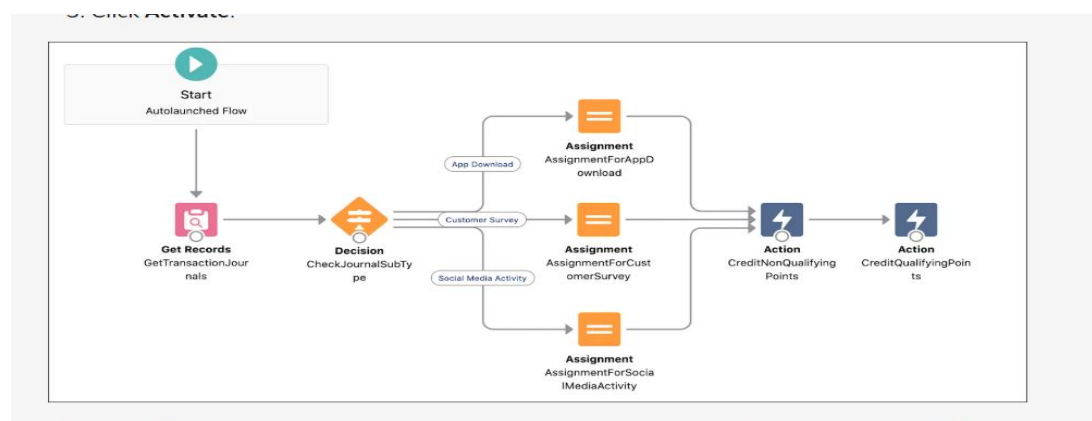
Step 2: Create a Batch Job for Processing Engagement Transactions

1. Navigate to Batch Management

1. Click Setup, then select Setup.
2. In the Quick Find box, type Batch and select Batch Management.

2. Create a New Batch Job

1. Click New and provide the following details:
 - Name: InnerCircleAccrualBatch
 - Process Type: Flow
 - Group: Loyalty
 - Execution Process: InnerCircleAccrualForEngagementActivities
 - Batch Size: 5
 - Retry Count: 2
 - Retry Interval: 1000
2. Click Next.



3. Define Batch Conditions
 - Set Flow Input Variable
 1. Flow Input Variable: JournalId

2. Object: Transaction Journal

Set Custom Condition Logic

1. Select Records When: Custom Condition Logic Is Met.

2. Enter Custom Condition Logic:

1 AND 2 AND 3 AND (4 OR 5 OR 6)

Add Conditions

Resource	Operator	Type	Value
Loyalty Program ID	Equals	Value	Cloud Kicks Inner Circle
Status	Equals	Value	Pending
Journal Type ID	Equals	Value	Accrual
Journal SubType ID	Equals	Value	Social Media Activity
Journal SubType ID	Equals	Value	Customer Survey
Journal SubType ID	Equals	Value	App Download

3. Click Save.

New batch job

Flow Input Variable: Journal ID

Object: Transaction Journal

Conditions

Select Records When: Customize the logic

Custom Logic: 1 AND 2 AND 3 AND (4 OR 5 OR 6)

#	Field	Operator	Type	Value
1	Loyalty Program ID	Equals	Value	Cloud Kicks Inner Circle
2	Status	Equals	Value	Pending
3	Journal Type ID	Equals	Value	Accrual
4	Journal SubType ID	Equals	Value	Social Media Activity
5	Journal SubType ID	Equals	Value	Customer Survey
6	Journal SubType ID	Equals	Value	App Download

Previous Save

4. Click Activate.

Step 3: Schedule the Batch Job

1. Navigate to Setup > Batch Management.

2. Select InnerCircleAccrualBatch.

3. Click Schedule.

4. Set the desired frequency and time for the batch job (e.g., Nightly at 12 AM).

5. Click Save.

4, Run the Accrual Process

Step 1: Create a Scheduled-Triggered Flow

1. Open Flow Builder

1. Click **Setup**, then select **Setup**.
2. In the **Quick Find** box, type **Flows** and select **Flows**.
3. Click **New Flow**.
4. Select **Start From Scratch**, then click **Next**.
5. Select **Scheduled-Triggered Flow**, then click **Create**.
6. In the button bar, switch from **Auto-Layout** to **Free-Form**.

2. Create a Resource for Batch Job Status

1. Open the **Manager** tab.
2. Click **New Resource**.
3. Provide the following details:
 - **Resource Type:** Variable
 - **API Name:** Output_Event
 - **Data Type:** Record
 - **Object:** Batch Job Status Changed Event
4. Click **Done**.

Step 2: Add Elements to the Flow

1. Run the Batch Job

1. Open the **Elements** tab.
2. Drag the **Action** element onto the canvas.
3. Provide the following details:
 - **Filter by:** Batch Job
 - **Action:** InnerCircleAccrualBatch
 - **Label:** Accrual Batch
4. Click **Done**.

2. Add a Wait Condition

1. Drag the **Wait for Conditions** element onto the canvas.
2. Provide the following details:
 - **Label:** Pause For Accrual Batch
 - **Wait Configuration Label:** Accruals Processed
 - **When to Wait:** Always Wait – No Conditions
3. Click **Resume Event** and enter the following details:
 - **Wait Until:** A Platform Event Message is Received
 - **Platform Event:** Batch Job Status Changed Event
 - **Condition Requirements:** All Conditions Are Met (AND)
 - **Field:** Batch Job
 - **Value:** Outputs from Accrual_Batch > batchJobId
 - **Platform Event Message:** Output_Event
4. Click **Done**.

3. Check If the Batch Job Was Successful

1. Drag the **Decision** element onto the canvas.
2. Provide the following details:
 - **Label:** Check Success
 - **Outcome Label:** Success
 - **Condition Requirements:** All Conditions Are Met (AND)
 - **Resource:** Output_Event > Status
 - **Operator:** Equals
 - **Value:** Success
3. Click **Done**.

Step 3: Set the Flow Schedule

1. Click the **Start** element.
2. Click **Set Schedule** and specify:
 - **Start Date:** Current Date
 - **Start Time:** 12:00 AM

- **Frequency:** Daily
3. Click **Done**.

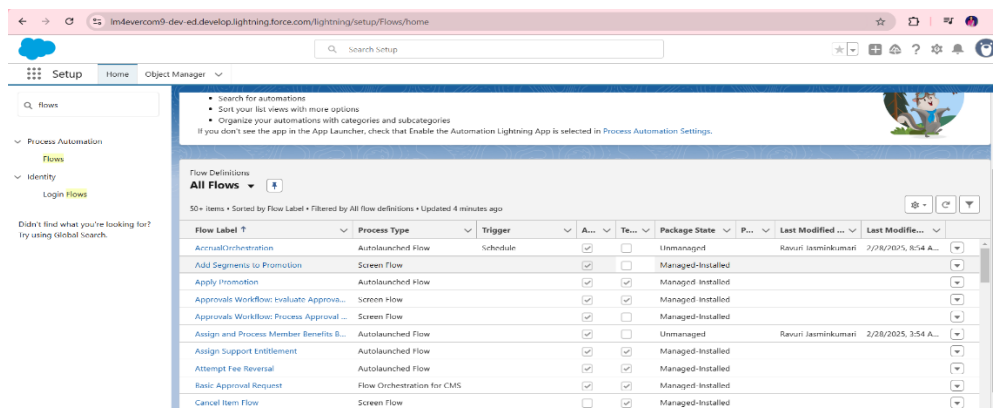
Step 4: Connect the Flow Elements

Connect the elements in the following order:

1. **Start → Accrual Batch (Action)**
2. **Accrual Batch → Pause For Accrual Batch (Wait for Conditions)**
3. **Pause For Accrual Batch → Check Success (Decision) [If Accruals Processed]**

Step 5: Save & Activate the Flow

1. Click **Save**.
 - **Flow Label:** AccrualOrchestration
2. Click **Save** again.
3. Click **Activate**.



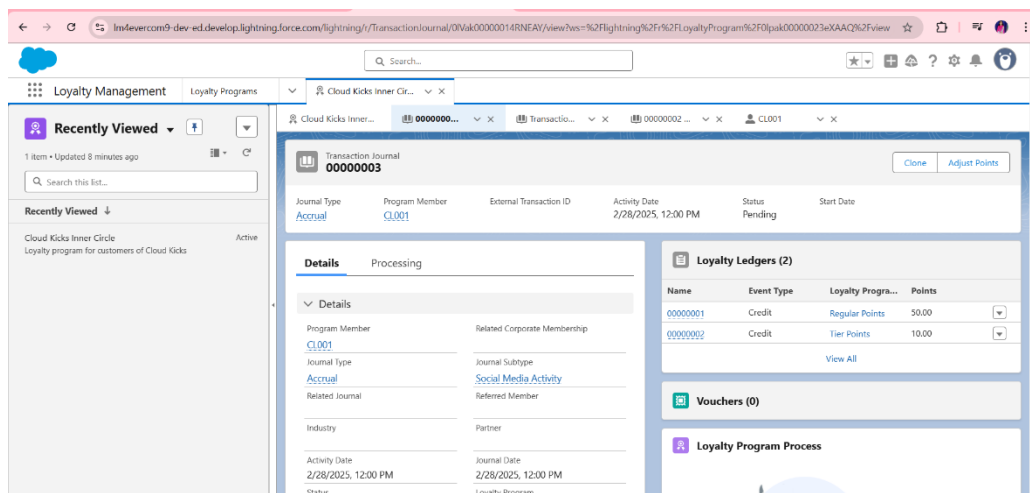
Step 6: Test the Accrual Process


Create a Transaction Journal

Linda will now test the orchestration flow by creating an engagement activity transaction for **Adria Darby**.

1. Navigate to **Loyalty Programs**.
2. Select **Cloud Kicks Inner Circle**.
3. Click the **Members And Partners** tab.
4. Under **Loyalty Program Members**, select **CL001**.
5. In the **Transaction Journals** section, click **New**.

6. Enter the following details:
 - **Journal Type:** Accrual
 - **Journal Subtype:** Social Media Activity
 - **Activity Date:** Current Date
 - **Journal Date:** Current Date
 - **Status:** Pending
 - **Loyalty Program:** Cloud Kicks Inner Circle
7. Click **Save**.



8. Click , and select **Setup**.
9. Enter **Flows** in the Quick Find box, and select **Flows**.
10. From the Flows list view, select **AccrualOrchestration**.
11. Click **Debug**.
12. Disable **Debug pause element behavior**.
13. Click **Run**

