

# Workbook Supplement: Screenshots

[Main Menu](#) | [Introduction](#) | [Setup](#) | [Configure](#) | [Explore](#) | [Enhance](#) | [Rearchitect](#) | [Resources](#)

## Setup

Financial Services Cloud (FSC) 30-day Trial Org:

- You will receive an email confirmation in approx. 10 minutes, containing a username, a link to verify your account, and set a password. Follow the instructions to verify your account and set a password.
- In the future, you can sign in to your FSC account with your username and password using the link [login.salesforce.com](https://login.salesforce.com)
- The trial account expires in 30 days. You can export your work using an unmanaged package or Salesforce DX for use in another FSC trial account.

Heroku trial instance:

- The Heroku trial instance does not expire.

MuleSoft AnyPoint Platform 30-day trial instance:

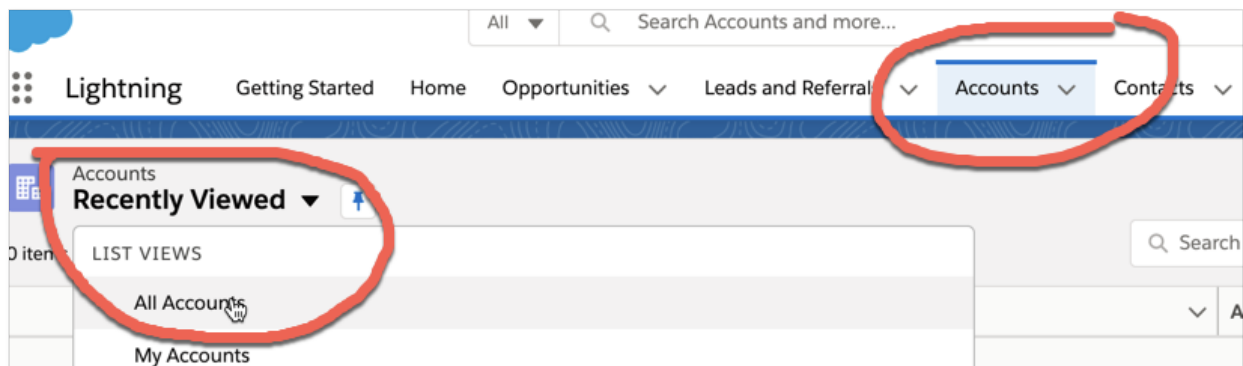
- The MuleSoft trial account expires in 30-days. However, you can export your work (e.g. Flow definitions) and import it into another trial account.

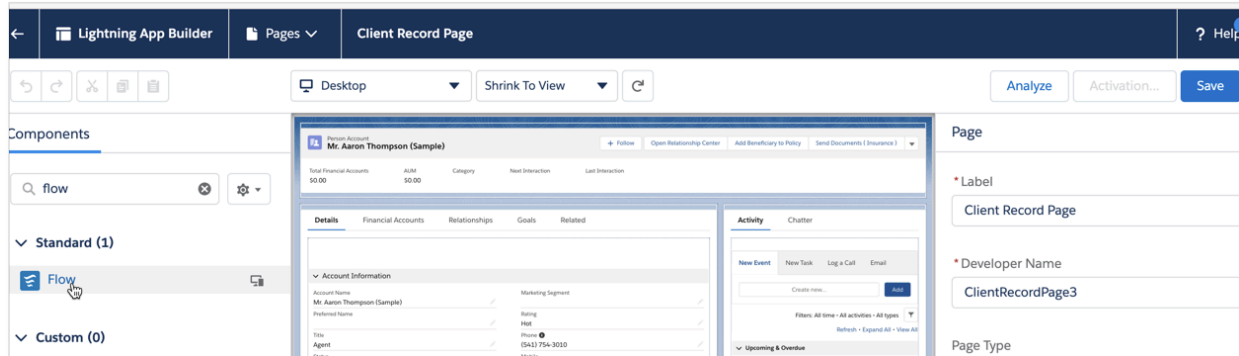
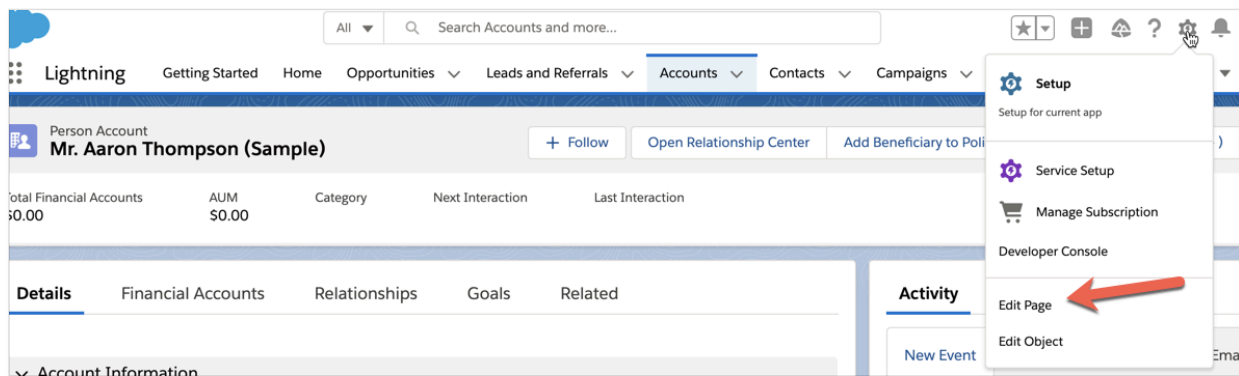
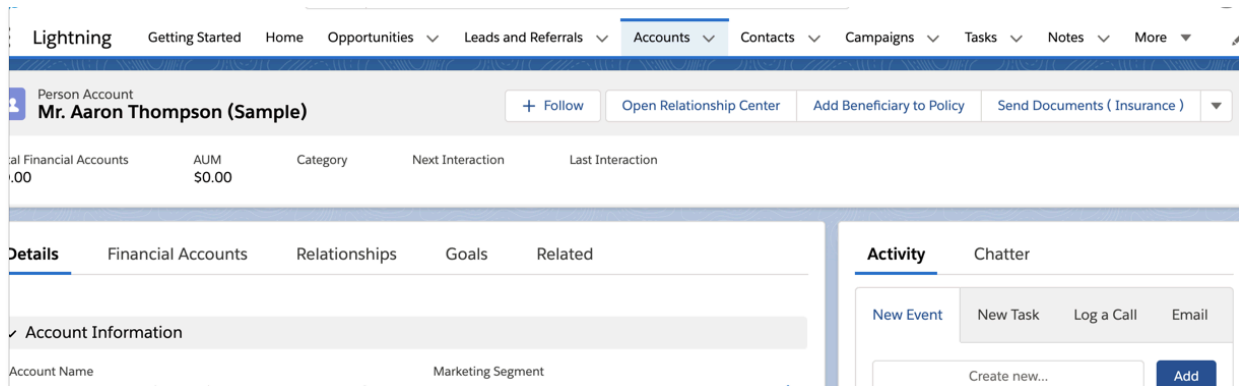
[Student Workbook: Main Menu](#)

## Configure (Supplementary Information)

### Financial Services Cloud Configuration

- After the successful installation of the starter configuration (aka unmanaged package), you should see the following metadata installed in your Org.
  - Account Address Change: Lightning Flow
  - create lead from lead\_event: Lightning Flow
  - Address Change custom Platform Event
  - Lead Event: Custom Platform Event
- Open up any account





Lightning App Builder | Pages | Client Record Page | Help

Desktop | Shrink To View

Analyze | Activation... | Save

Components

flow

Standard (1)

Flow

Custom (0)

Custom - Managed (0)

Person Account: Mr. Aaron Thompson (Sample)

Total Financial Accounts: \$0.00 | AUM: \$0.00 | Category: | Next Interaction: | Last Interaction: |

Details | Financial Accounts | Relationships | Goals | Related

Account Information

Account Name: Mr. Aaron Thompson (Sample) | Marketing Segment: | Rating: | Hot: |

Preferred Name: | Phone: (543) 754-3020 | Mobile: |

Title: | Agent: | Status: |

Category: | Email: aaron@thompson.com | Account Owner: | Important Notes: |

Birthdate: | Age: | Type: | Partner: |

Billing Address: 1110 Market Street | Shipping Address: |

Flow Component: Account Address Change

This is a placeholder. Flows don't run in the canvas.

New Event | New Task | Log a Call | Email

Create new... | Add

Filters: All time - All activities - All types | Refresh | Expand All | View All

Upcoming & Overview

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.

Page > Flow

Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.

\* Flow

Account Address Change

Edit Flow in Flow Builder

Layout

One Column

Optionally, enter values for these flow variables. Only variables that show input are required.

Lightning App Builder | Pages | Client Record Page | Help

Desktop | Shrink To View

Analyze | Activation... | Save

Components

flow

Standard (1)

Flow

Custom (0)

Custom - Managed (0)

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Total Financial Accounts: \$0.00 | AUM: \$0.00 | Category: | Next Interaction: | Last Interaction: |

Details | Financial Accounts | Relationships | Goals | Related

Account Information

Account Name: Mr. Aaron Thompson (Sample) | Marketing Segment: | Rating: | Hot: |

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Title: | Agent: | Status: |

Category: | Email: aaron@thompson.com | Account Owner: | Important Notes: |

Birthdate: | Age: | Type: | Partner: |

Billing Address: 1110 Market Street | Shipping Address: |

Flow Component: Account Address Change

This is a placeholder. Flows don't run in the canvas.

Activity | Chatter

New Event | New Task | Log a Call | Email

Create new... | Add

Filters: All time - All activities - All types | Refresh | Expand All | View All

Upcoming & Overview

No next steps

To get things moving, add a task or set up a meeting.

Page > Flow

v\_idOther

Pass record ID into this variable

v\_recordID

{!Record.Id}

Pass record ID into this variable

v\_shippingCity

Lightning | Getting Started | Home | Opportunities | Leads and Referrals | Accounts | Contacts | Campaigns | Tasks | Notes | More

Person Account: Mr. Aaron Thompson (Sample)

+ Follow | Open Relationship Center | Add Beneficiary to Policy | Send Documents (Insurance)

Total Financial Accounts: \$0.00 | AUM: \$0.00 | Category: | Next Interaction: | Last Interaction: |

Details | Financial Accounts | Relationships | Goals | Related

Account Information

Account Name: Mr. Aaron Thompson (Sample) | Marketing Segment: | Rating: | Hot: |

Preferred Name: |

Account Address Change

Use this flow to quickly change an Account's billing or shipping address. This will also synchronize your change to the MDM.

Next

Activity | Chatter

[Student Workbook: Main Menu](#)


Heroku Configuration:

operation.php	Update operation.php	8 days ago	PHP 92.8%	JavaScript 3.9%
style.css	Update style.css	8 days ago	CSS 3.3%	
wide-characters.jpg	Add files via upload	8 days ago		

README.md

# finscabin

[Deploy to Heroku](#)

 **HEROKU**

Already have an account? [Log in](#)

You'll need a Heroku account to deploy the app

HEROKU

Jump to Favorites, Apps, Pipelines, Spaces...

Create New App

Deploy your own [Fins Cabin](#)  
A PHP MySQL CRUD application on Heroku.  
[lightningexperience/finscabin#main](#)

App name

edaworkshop is available

Choose a region

United States

Create app	✓
Configure environment	✓
Build app <a href="#">Show build log</a>	✓
Run scripts & scale dynos	✓
Deploy to Heroku	✓

Your app was successfully deployed.

[Manage App](#) [View](#)

Salesforce Platform

HEROKU

Jump to Favorites, Apps, Pipelines, Spaces...

Personal > edaworkshop

Overview Resources Deploy Metrics Activity Access Settings

Free Dynos [Change Dyno Type](#)

web heroku-php-apache2 \$0.00

Add-ons

CloudAMQP Attached as CLOUDAMQP Little Lemur Free

JawsDB MySQL Attached as JAWSDB Kitefin Shared Free

Estimated Monthly Cost \$0.00

Heroku Add-ons edaworkshop → Resources Activity Access Settings CloudAMQP → Docs

[RabbitMQ Manager](#)

DETAILS

ALARMS

WEBHOOKS

DEFINITIONS

Hosts fish.rmcloudamqp.com (Load balanced)  
fish-01.rmcloudamqp.com

Region amazon-web-services:us-east-1

Active Plan

RabbitMQ 3.8.5 Erlang 22.3.4.12

Refreshed 2021-04-11 23:55:28 Refresh every 5 seconds

Virtual host All

Cluster fish

User yyektaev Log out

Overview Connections Channels Exchanges Queues Admin

Queues

All queues (0)

Pagination

Page 1 of 0 - Filter:  ☐ Regex ?

Displaying 0 item , page size up to: 100

... no queues ...

Add a new queue

Type: Classic

Name: eda01

Durability: Durable

Auto delete: No

Arguments:  =  String

RabbitMQ 3.8.5 Erlang 22.3.4.12

Refreshed 2021-04-11 23:58:43 Refresh every 5 seconds

Virtual host All Cluster fish User yyektaev Log out

Overview Connections Channels **Exchanges** Queues Admin

## Exchanges

▼ All exchanges (7)

Pagination

Page 1 of 1 - Filter: Regex ?

Displaying 7 items , page size up to: 100

Name	Type	Features	Message rate in	Message rate out	+/-
(AMQP default)	direct	D			
amq.direct	direct	D			
amq.fanout	fanout	D			

RabbitMQ 3.8.5 Erlang 22.3.4.12

Refreshed 2021-04-12 00:00:08 Refresh every 5 seconds

Virtual host All Cluster fish User yyektaev Log out

Overview Connections Channels **Exchanges** Queues Admin

Type direct

Features durable: true

Policy

### Bindings

This exchange

↓

... no bindings ...

Add binding from this exchange

To queue: eda01 \*

Routing key:

Arguments: = String

Bind

RabbitMQ 3.8.5 Erlang 22.3.4.12

Refreshed 2021-04-12 00:00:42 Refresh every 5 seconds

Virtual host All Cluster fish User yyektaev Log out

Overview Connections Channels **Exchanges** Queues Admin

Type direct

Features durable: true

Policy

### Bindings

This exchange

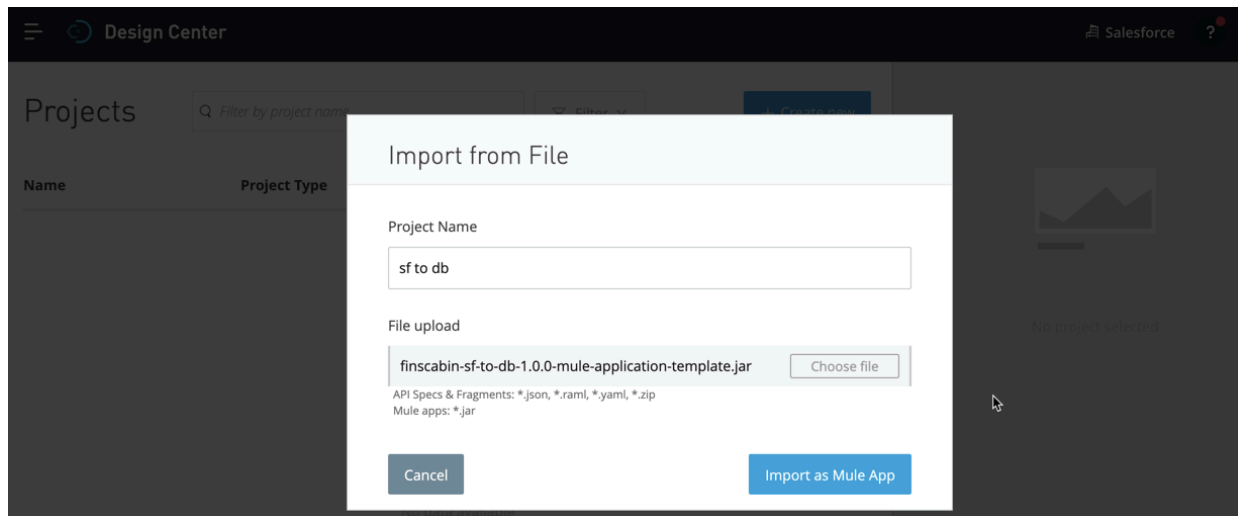
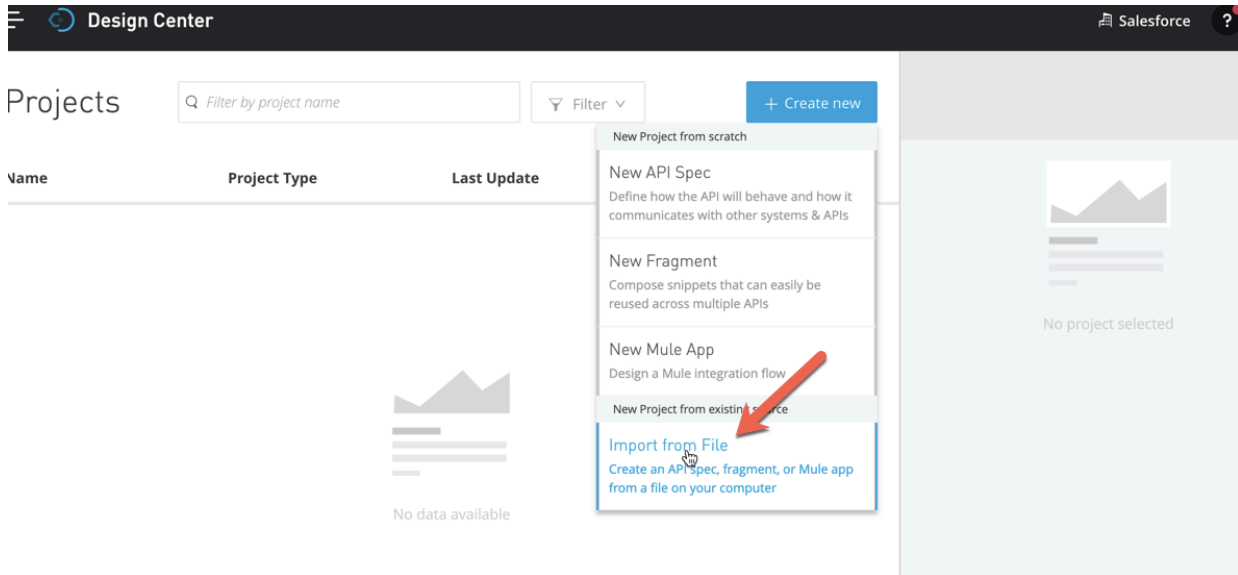
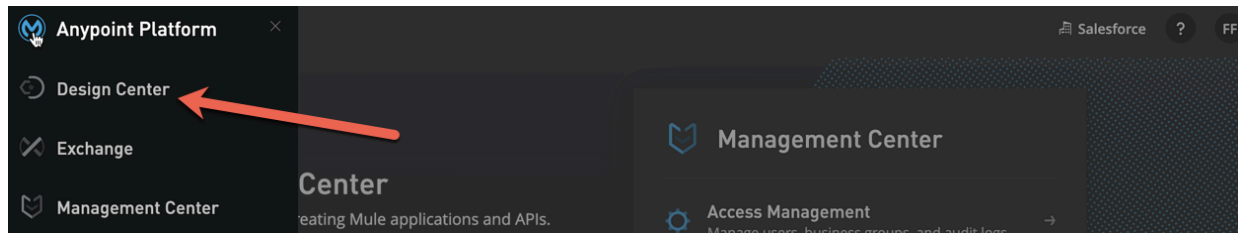
↓

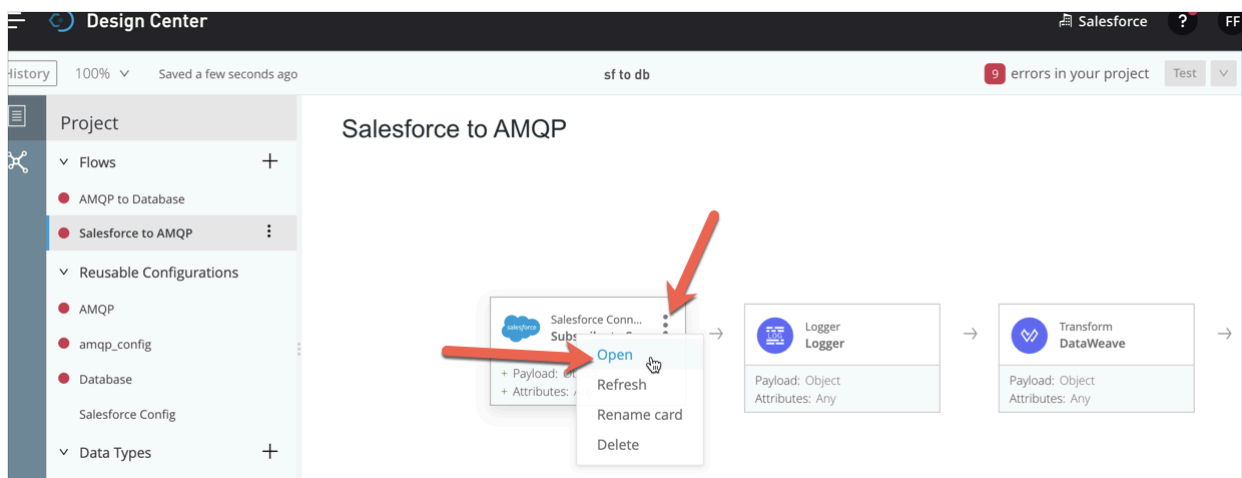
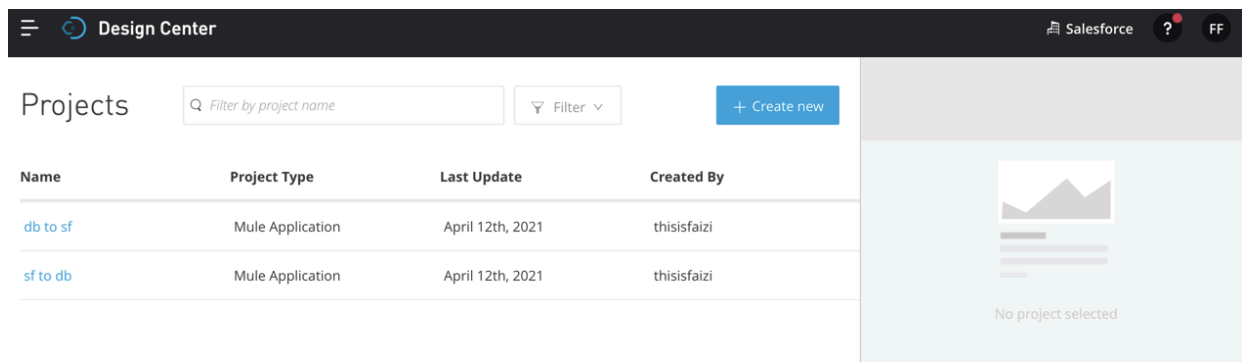
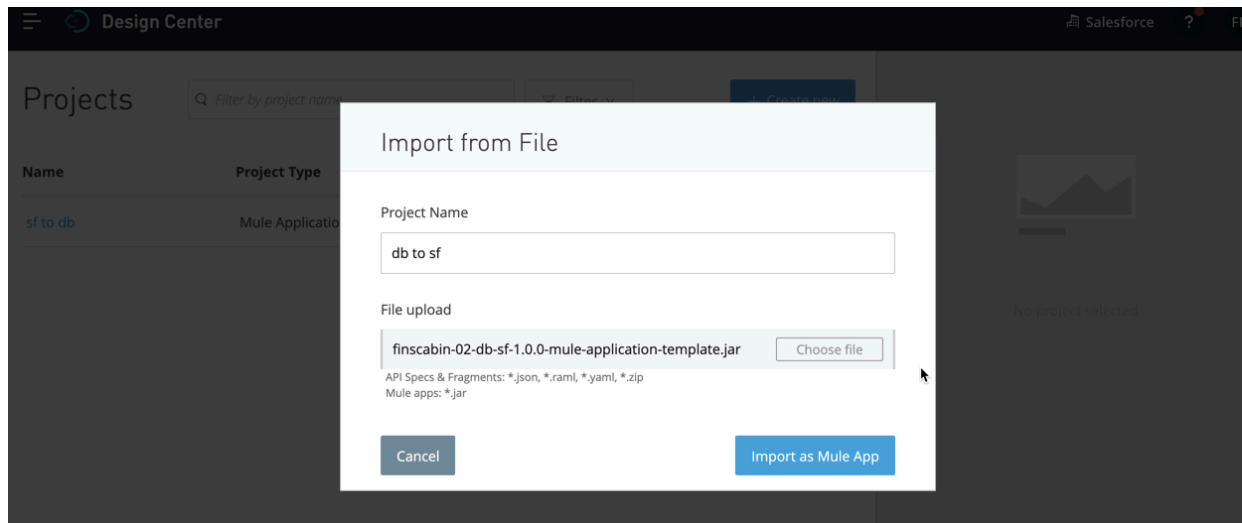
To	Routing key	Arguments
eda01		Unbind

Add binding from this exchange

To queue: \*

## MuleSoft Configuration:







Design Center

History 100% Saved 4 minutes ago sf to db 9 errors in your project Test

Project

- Flows
  - AMQP to Database
  - Salesforce to AMQP
- Reusable Configurations
  - AMQP
  - amqp\_config
  - Database

### Salesforce to AMQP

Salesforce Connector Subscribe to Salesforce... Configuration Output Notes

Using the Salesforce Config configuration. [Edit](#) [Switch configurations](#)

General Streaming Channel (required) ⓘ  
/event/Address\_Change\_e

Redelivery

Advanced

Payload

Design Center

Project

- Flows
  - AMQP to Database
  - Salesforce to AMQP
- Reusable Configurations
  - AMQP
  - amqp\_config
  - Database
- Data Types
  - Custom Type
  - Custom Type (2)

### Salesforce Configuration

#### Configure Connection

fsc03

☒ Share this connection with my business group

Connection Type (required)  
Basic Username Password

Username (required) ⓘ  
ffaizi-3p6p@force.com

Password (required) ⓘ  
..... [Show](#)

[Test](#) [Cancel](#) [Save](#)

Heroku Add-ons

edaworkshop → Resources Activity Access Settings CloudAMQP → Details

[RabbitMQ Manager](#)

### Details

Hosts fish.rm.cloudamqp.com (Load balanced)  
[fish-01.rm.cloudamqp.com](#)

Region amazon-web-services::us-east-1

Created at 2021-04-12 02:08 UTC+00:00

User & Vhost yyektaev

Password \*\*\* ⓘ [Reset](#)


AMQP URL amqps://yyektaev:\*\*\*@fish.rm.cloudamqp.com/yyektaev ⓘ

MQTT details

Open connections 0 of 20

When you've reached the maximum concurrent connections fur

Active Plan

  
Little Lemur

Please note that the **username and virtual host (Vhost) are the same** values. These fields are separately listed in the Mule Connection page in the Mule AMQP Connector and both fields (username and Vhost) need to be populated (with the same values).

The screenshot shows the 'Configure Connection' dialog in the Mule Design Center. The dialog has a sidebar on the left with a tree view containing 'Project', 'Flows', 'AMQP to Database', 'Salesforce to AMQP', 'Reusable Configuration', 'AMQP', 'amqp\_config', 'Database', 'Salesforce Configuration', 'Data Types', 'Custom Type', and 'Custom Type (2)'. The main area of the dialog is titled 'Configure Connection' and contains the following fields:

- Name:** rabbit03
- Share this connection with my business group:** ☒
- Connection Type (required):** Connection (dropdown menu)
- Host (required):** fish-01.rmqs.cloudamqp.com
- Port:** 5672

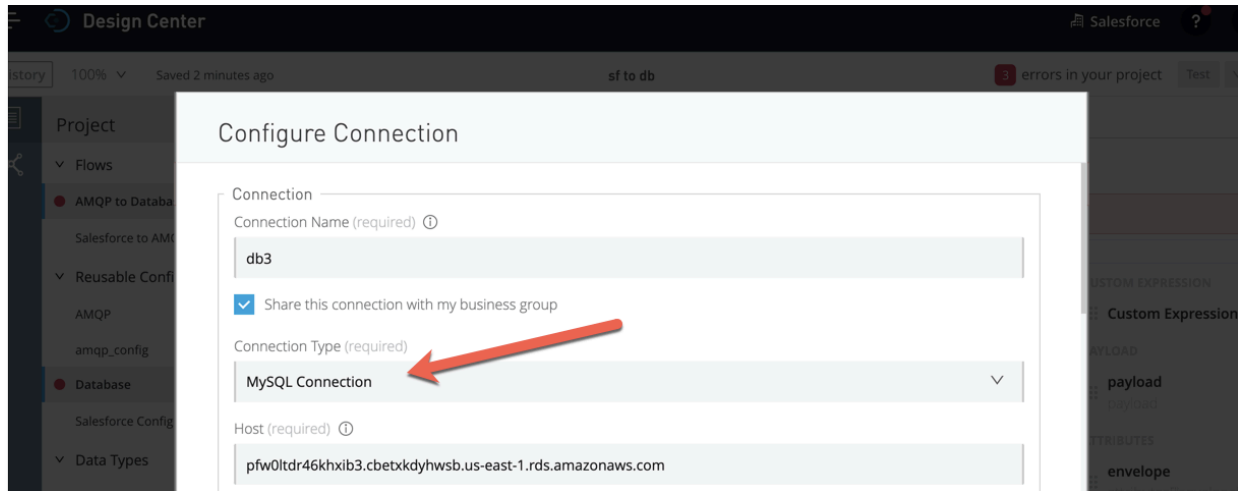
At the bottom of the dialog are three buttons: 'Test', 'Cancel', and 'Save'. A red arrow points to the 'Test' button, and another red arrow points to the 'Save' button.

The screenshot shows the 'Settings for edaworkshop' page in the Heroku Add-ons section. The page has a dark blue background and a white text area. The 'Connection Info' section is highlighted in a light blue box. It contains the following information:

- Connection String:** mysql://kyvl6o9jss2mjyqe:bdaobujy23863jjy@pfw0ltdr46kxib3.cbetxkdyhwsb.us-east-1.rds.amazonaws.com:3306/khkd5h93e0t4yr6m
- Text:** You can use your connection information to connect manually through a client such as [HeidiSQL](#) to administer your database.

Below the connection string is a table with the following properties:

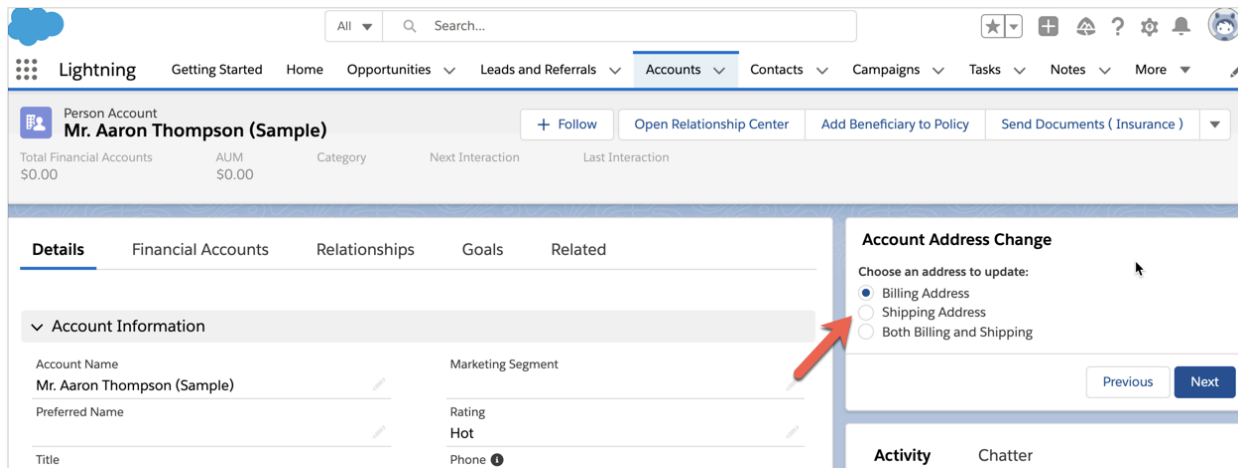
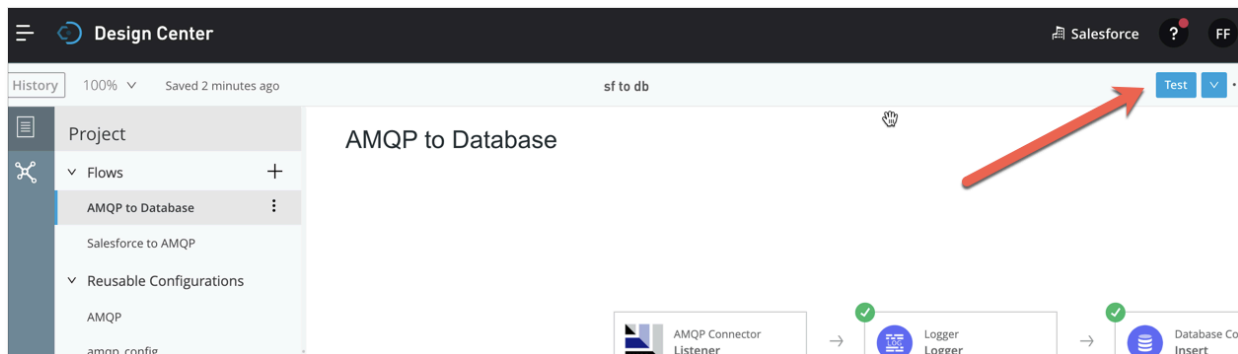
Property	Value	Action
Host	pfw0ltdr46kxib3.cbetxkdyhwsb.us-east-1.rds.amazonaws.com	
Username	kyvl6o9jss2mjyqe	
Password	bdaobujy23863jjy	<a href="#">Reset</a>
Port	3306	
Database	khkd5h93e0t4yr6m	



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## Explore

Account Address Change



Salesforce Platform

HEROKU

Jump to Favorites, Apps, Pipelines, Spaces...

Personal > edaworkshop ☆ Open app More >


Overview Resources Deploy Metrics Activity Access Settings

Free Dynos Change Dyno Type

web heroku-php-apache2 \$0.00

## Fins Cabin Workshop

Event Driven Architecture in Financial Services



HOME LEADS CUSTOMERS

### Customer Information

Truncate Table

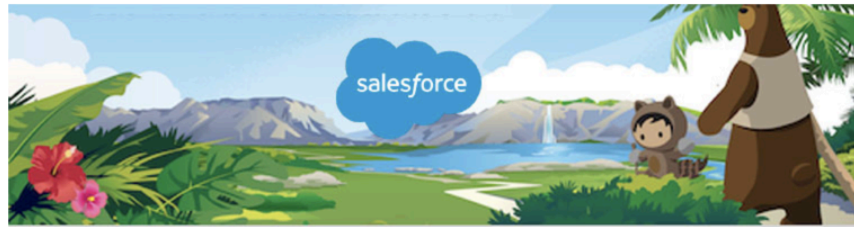
Account ID	Name	Address
0015e000002Jt9bAAC	Aaron Thompson (Sample) (Billing Address Updated)	12 Redwood Drive San Francisco CA United States 94103

[Student Workbook: Main Menu](#)

Lead Transmission Flow:

# Fins Cabin Workshop

Event Driven Architecture in Financial Services



HOME

LEADS

CUSTOMERS

## Lead Management

john@rosenmills.com

Rosen

John



Lightning Getting Started Home Opportunities **Leads and Referrals** Accounts Contacts Campaigns Tasks Notes More

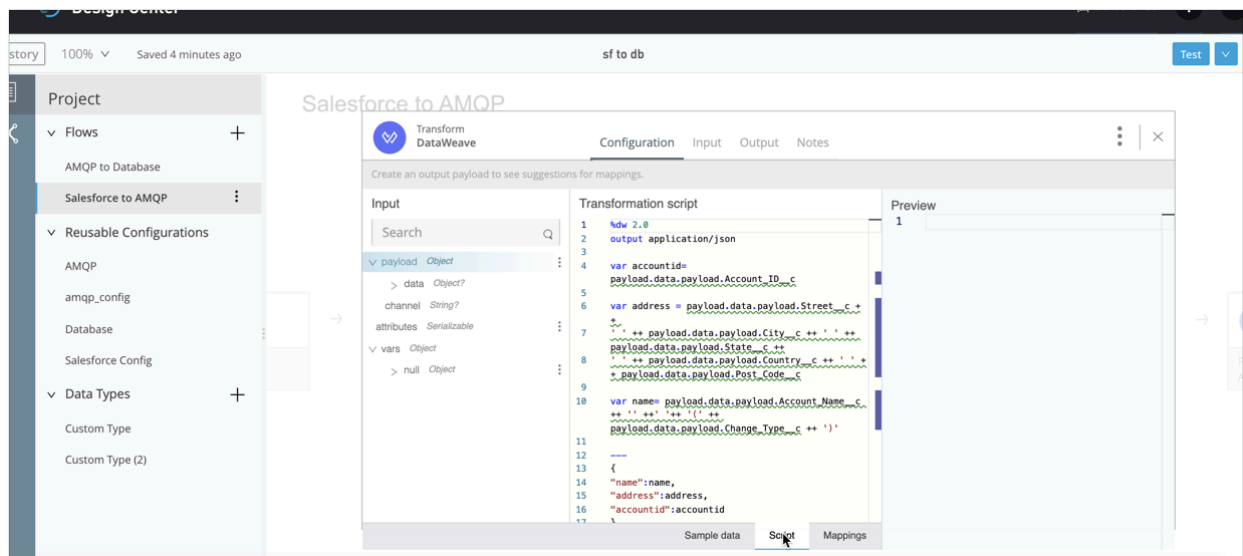
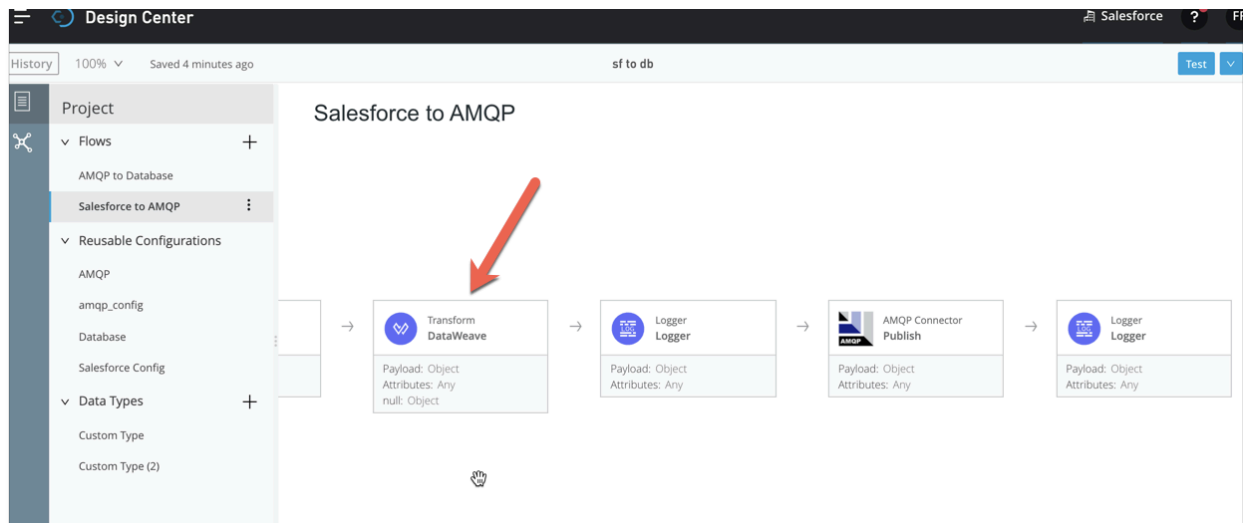
Leads and Referrals Today's Leads and Referrals New Import Add to Campaign Change Status Change Owner

1 item • Sorted by Name • Filtered by All leads and referrals • Created Date • Updated a few seconds ago

<input type="checkbox"/>	Name ↑	Company	State/Province	Email	Lead and Ref...	Created Date	Owner Alias	Unread By O...
1	<input type="checkbox"/> John				New	2021-04-12, 1:42 AM	flast	<input checked="" type="checkbox"/>

[Student Workbook: Main Menu](#)

Examine Your Architecture:



[Student Workbook: Main Menu](#)

Enhance

[Student Workbook: Main Menu](#)

Rearchitected

End