**WABA- Share Fund Claim record with Partner Users Documentation**

Version: 2

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**1. Business Overview**

**WABA- Share Fund Claim record with Partner Users Flow Explanation**

**SECTION 1: BUSINESS PURPOSE**

The "WABA- Share Fund Claim record with Partner Users" flow is designed to automatically share a Partner Fund Claim record with specific partner users when the record is created or updated. This flow ensures that the right people have access to the fund claim information, facilitating collaboration and processing.

The business problem this flow solves is the manual sharing of fund claim records with partner users, which can be time-consuming and prone to errors. By automating this process, the flow improves efficiency, reduces administrative burden, and ensures that partner users have timely access to relevant information.

The benefits of this flow include:

1. \*\*Automated sharing\*\*: The flow automatically shares the Partner Fund Claim record with the relevant partner users, eliminating the need for manual sharing.
2. \*\*Improved collaboration\*\*: By granting access to the right people, the flow facilitates collaboration and processing of fund claims.
3. \*\*Reduced administrative burden\*\*: The flow reduces the administrative task of manually sharing records, freeing up resources for more strategic activities.

**SECTION 2: TECHNICAL EXPLANATION**

### 2.1 Flow Trigger and Overall Process

The flow is triggered when a Partner Fund Claim record is created or updated (RecordAfterSave trigger). The flow checks if the Channel Partner Id is not empty and then proceeds to share the record with the relevant partner users.

### 2.2 Record Lookups

The flow performs two record lookups to gather necessary information.

| **Lookup Name** | **What It Retrieves** | **Business Logic** |
| --- | --- | --- |
| GetUserRecord | **Purpose:** Retrieves the User record associated with the Channel Partner Id.  **Outcome:** Retrieves the UserRoleId of the user associated with the Channel Partner Id. | 1. The flow uses the Channel Partner Id from the Partner Fund Claim record to 2. find the corresponding User record. 3. The UserRoleId is extracted from the User record and stored in the UserRoleID variable. |
| GetGroupID | **Purpose:** Retrieves the Group Id related to the UserRoleId.  **Outcome:** Retrieves the Id of the Group associated with the UserRoleId. | 1. The flow uses the UserRoleId retrieved earlier to find the corresponding Group record. 2. The Group Id is filtered based on conditions: RelatedId equals UserRoleId, Type 3. is not "PRMOrganization", and Name is not "All Partners" or "WABA - All Partners". 4. The Id of the matching Group is used to create a share record. |

### 2.3 Record Creates

The flow creates a new PartnerFundClaimShare record to share the Partner Fund Claim with the relevant partner users.

| **Operation** | **What It Does** | **Business Impact** |
| --- | --- | --- |
| Create\_Share\_Record | This creates a PartnerFundClaimShare record by setting:   * AccessLevel to "Edit" - grants edit access to the shared record. * ParentId to the Id of the Partner Fund Claim record - links the share record to the original record. * RowCause to "Manual" - indicates the reason for sharing. * UserOrGroupId to the Id of the Group retrieved earlier - specifies the users who will have access. | This ensures that the relevant partner users have edit access to the Partner Fund Claim record, facilitating collaboration and processing. |

In summary, the "WABA- Share Fund Claim record with Partner Users" flow automates the sharing of Partner Fund Claim records with partner users by creating a PartnerFundClaimShare record with the relevant Group Id. This flow improves collaboration, reduces administrative burden, and ensures timely access to fund claim information.

**2. Technical Details**

**Flow Information**

|  |  |
| --- | --- |
| **Property** | **Value** |
| **API Name** | WABA\_Share\_Fund\_Claim\_record\_with\_Partner\_Users |
| **Version** | 2 |
| **Type** | AutoLaunchedFlow |
| **Description** | T97187712, T100787085 |

**Trigger Configuration**

|  |  |
| --- | --- |
| **Property** | **Value** |
| **Type** | Record-Triggered |
| **Object** | PartnerFundClaim |
| **Trigger** | When created or updated |
| **Filter Logic** | and |

**Trigger Conditions**

|  |  |  |
| --- | --- | --- |
| **Field** | **Operator** | **Value** |
| ChannelPartnerId | NotEqualTo |  |

**3. Flow Analysis**

**Variables**

|  |  |  |
| --- | --- | --- |
| **Variable Name** | **Data Type** | **Description** |
| UserRoleID | String | Input Variable, Output Variable |

**Decision Logic**

No decisions defined in this flow.

**Record Operations**

No record operations defined in this flow.

**Screens**

No screens defined in this flow.

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**RL - Update the Tier and Type on User Documentation**

Version: 1

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**1. Business Overview**

**SECTION 1: BUSINESS PURPOSE**

The "RL - Update the Tier and Type on User" flow is designed to automatically update specific fields on a User record when certain conditions are met. This flow exists to synchronize user data with related account information, ensuring that user records are consistently updated with the latest partner tier and type information.

This flow addresses several business needs:

1. \*\*Data Consistency\*\*: Ensures that user records reflect the current status of their associated accounts.
2. \*\*Automated Updates\*\*: Reduces manual effort by automatically updating user fields based on related account data.
3. \*\*Conditional Logic\*\*: Applies business rules to determine which users should be updated based on their profile and account type.

**SECTION 2: TECHNICAL EXPLANATION**

### 2.1 Trigger and Conditions

The flow is triggered when a User record is created or updated (RecordAfterSave trigger). The trigger conditions filter which user updates will initiate the flow:

* The user must have a ContactId (not null)
* The user must be active (IsActive = true)
* The user's ProfileId must match one of two specific profiles (00e8V000001httN or 00e8V000001qJcR)

### 2.2 Decision Logic

**2.2 Decision Logic**

This section explains the key decision points in the flow and what they determine.

| **Decision Element** | **What It Checks** | **Business Logic** |
| --- | --- | --- |
| Account RecordType Standard | **Purpose:** Checks if the user's associated account has a specific RecordTypeId.  **Outcome:** If the condition is met, the flow proceeds to update the user fields. | 1. The decision checks if the RecordTypeId of the user's associated account matches '012A00000016XW9IAM'. 2. If true, it follows the 'Yes' path to update the user fields. 3. If false, it follows the default path, effectively ending the flow without updates. |

### 2.3 Formulas and Assignments

The flow uses a formula named "accountName" to generate a value for the Account\_Name\_\_c field:

```text

IF ( ISNULL({!$Record.Contact.Account.ARVR\_Account\_Name\_\_c}), '',

SUBSTITUTE({!$Record.Contact.Account.ARVR\_Account\_Name\_\_c}, ' ', '\_') )

```

This formula checks if the ARVR\_Account\_Name\_\_c field on the associated account is null. If it is, the formula returns an empty string. Otherwise, it replaces spaces in the account name with underscores.

There are no explicit assignments in this flow; instead, values are directly referenced in the record update operation.

### 2.4 Record Updates

**2.4 Record Updates & Creates**

This section explains how the flow modifies Salesforce data.

| **Operation** | **What It Does** | **Business Impact** |
| --- | --- | --- |
| Update\_Fields | This updates the User record ($Record) by setting:   * Account\_Name\_\_c to the result of the accountName formula (replacing spaces with underscores) * Region\_\_c to the FRL\_Region\_\_c value from the associated account * WA\_Partner\_Tier\_\_c to the RL\_Partner\_Tier\_\_c value from the associated account * WA\_Partner\_Type\_\_c to the FRL\_Enterprise\_Account\_Type\_\_c value from the associated account | This ensures that the user record is updated with relevant information from their associated account, maintaining data consistency across the platform. |

### Key Observations

1. The flow updates the User record directly, which is an "Unknown Object" in the provided metadata. This is because the object is referenced through the $Record variable, which is determined by the trigger object (User).
2. The flow relies on the existence of a ContactId for the User and specific fields on the associated Account record. If these relationships or fields are missing, the flow may not function as intended.
3. The use of hardcoded IDs (e.g., RecordTypeId, ProfileIds) suggests that the flow is designed for a specific org configuration and may require adjustments when deployed to other environments.

**2. Technical Details**

**Flow Information**

|  |  |
| --- | --- |
| **Property** | **Value** |
| **API Name** | RL\_Update\_the\_Tier\_and\_Type\_on\_User |
| **Version** | 1 |
| **Type** | AutoLaunchedFlow |
| **Description** | V1 - T224968453 |

**Trigger Configuration**

|  |  |
| --- | --- |
| **Property** | **Value** |
| **Type** | Record-Triggered |
| **Object** | User |
| **Trigger** | When created or updated |
| **Filter Logic** | 1 AND 2 AND (3 OR 4) |

**Trigger Conditions**

|  |  |  |
| --- | --- | --- |
| **Field** | **Operator** | **Value** |
| ContactId | IsNull | false |
| IsActive | EqualTo | true |
| ProfileId | EqualTo | 00e8V000001httN |
| ProfileId | EqualTo | 00e8V000001qJcR |

**3. Flow Analysis**

**Variables**

No variables defined in this flow.

**Decision Logic**

**Account RecordType Standard**

|  |  |
| --- | --- |
| **Rule** | **Conditions** |
| Yes | * $Record.Contact.Account.RecordTypeId equals 012A00000016XW9IAM |

**Record Operations**

**Record Updates**

**Update Fields (User)**

|  |  |
| --- | --- |
| **Field** | **Value** |
| Account\_Name\_\_c | {!accountName} |
| Region\_\_c | {!$Record.Contact.Account.FRL\_Region\_\_c} |
| WA\_Partner\_Tier\_\_c | {!$Record.Contact.Account.RL\_Partner\_Tier\_\_c} |
| WA\_Partner\_Type\_\_c | {!$Record.Contact.Account.FRL\_Enterprise\_Account\_Type\_\_c} |

**Screens**

No screens defined in this flow.

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**LlamaX Add Users to RL & AI Partnerships Public Group Documentation**

Version: 1

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**1. Business Overview**

**LlamaX Add Users to RL & AI Partnerships Public Group Flow Explanation**

**SECTION 1: BUSINESS PURPOSE**

The LlamaX Add Users to RL & AI Partnerships Public Group flow is designed to automatically add new or updated users to a specific public group in Salesforce based on their role. This flow ensures that users with roles starting with "RL & AI Partnerships" are included in the relevant public group, facilitating collaboration and information sharing within the organization.

This flow exists to solve the business problem of manually managing public group memberships, which can be time-consuming and prone to errors. By automating this process, the organization can ensure that the right people are included in the relevant groups, improving communication and productivity.

The benefits of this flow include:

1. Automated membership management, reducing administrative burden.
2. Ensuring that users with relevant roles are included in the public group, enhancing collaboration.
3. Minimizing the risk of incorrect or outdated group memberships.

**SECTION 2: TECHNICAL EXPLANATION**

**2.1 Trigger and Initial Logic**

The flow is triggered when a User record is created or updated. It checks if the user's Role\_Name\_\_c field starts with "RL & AI Partnerships".

| **Trigger Element** | **What It Checks** | **Business Logic** |
| --- | --- | --- |
| User Record Trigger | **Purpose:** Triggers the flow when a User is created or updated.  **Condition:** Role\_Name\_\_c starts with "RL & AI Partnerships" | 1. Ensures that only relevant users are processed by the flow. 2. Triggers on both create and update to catch new users and changes to existing users' roles. |

**2.2 Record Lookups**

This section explains how the flow retrieves the necessary public group information.

| **Lookup Name** | **What It Retrieves** | **Business Logic** |
| --- | --- | --- |
| GetPublicGroup | Retrieves the Group record with the name "RL & AI Partnerships". | This lookup is necessary to get the ID of the public group to which the user should be added.  It assumes that there is a public group named "RL & AI Partnerships" in the organization. |

**2.3 Record Creates**

This section explains how the flow adds the user to the public group.

| **Create Operation** | **What It Does** | **Business Impact** |
| --- | --- | --- |
| CreatePublicGroupMembers | Creates a new GroupMember record.   * GroupId is set to the ID of the "RL & AI Partnerships" public group. * UserOrGroupId is set to the ID of the user being processed. | This effectively adds the user to the "RL & AI Partnerships" public group.  It ensures that users with the appropriate role are members of the relevant collaboration group. |

**2.4 Overall Flow Logic**

The flow operates as follows:

1. Triggered by the creation or update of a User record.
2. Checks if the user's role starts with "RL & AI Partnerships".
3. Retrieves the "RL & AI Partnerships" public group.
4. Creates a new GroupMember record to add the user to the public group.

This flow demonstrates a straightforward automation that enhances collaboration within the organization by ensuring that relevant users are included in the appropriate public groups based on their roles.

**2. Technical Details**

**Flow Information**

|  |  |
| --- | --- |
| **Property** | **Value** |
| **API Name** | LlamaX\_Add\_Users\_to\_RL\_AI\_Partnerships\_Public\_Group |
| **Version** | 1 |
| **Type** | AutoLaunchedFlow |

**Trigger Configuration**

|  |  |
| --- | --- |
| **Property** | **Value** |
| **Type** | Record-Triggered |
| **Object** | User |
| **Trigger** | When created or updated |
| **Filter Logic** | and |

**Trigger Conditions**

|  |  |  |
| --- | --- | --- |
| **Field** | **Operator** | **Value** |
| Role\_Name\_\_c | StartsWith | RL & AI Partnerships |

**3. Flow Analysis**

**Variables**

|  |  |  |
| --- | --- | --- |
| **Variable Name** | **Data Type** | **Description** |
| PublicGroupMembers | SObject (CollaborationGroupMember) | No description |

**Decision Logic**

No decisions defined in this flow.

**Record Operations**

No record operations defined in this flow.

**Screens**

No screens defined in this flow.

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**Add or Remove User from Public Group Documentation**

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**1. Business Overview**

**SECTION 1: BUSINESS PURPOSE**

The "Add or Remove User from Public Group" flow is designed to manage user membership in public groups within Salesforce. It allows for the dynamic addition or removal of users from specific public groups based on input parameters. This flow solves the business problem of manually managing group memberships, which can be time-consuming and prone to errors.

The benefits of this flow include:

1. \*\*Automation of Group Management\*\*: It automates the process of adding or removing users from public groups, reducing manual effort.
2. \*\*Flexibility\*\*: The flow can be triggered with different actions ('Add' or 'Remove') and can handle various user and group combinations.
3. \*\*Error Reduction\*\*: By automating the process, it minimizes the chance of human error in managing group memberships.

**SECTION 2: TECHNICAL EXPLANATION**

### 2.1 Decision Logic

The flow contains a key decision element named "Add or Remove User ?" which determines whether to add or remove a user from a public group based on the input parameters.

| **Decision Element** | **What It Checks** | **Business Logic** |
| --- | --- | --- |
| Add or Remove User ? | **Purpose:** Determines whether to add or remove a user from a public group.  **Outcome:** Based on the 'Ivar Action' and the existence of 'P groupmemberid', it decides the next step. | 1. If 'Ivar Action' is 'Add' and the user is not already a member ('P groupmemberid' is empty), it proceeds to add the user. 2. If 'Ivar Action' is 'Remove' and the user is a member ('P groupmemberid' is not empty), it proceeds to remove the user. |

### 2.2 Loops

There are no loops in this flow.

### 2.3 Assignments

There are no assignments in this flow. The variables are primarily used to store input values and the result of the "Retrieve User In Public Group" operation.

### 2.4 Record Updates & Creates

The flow performs two main record operations: creating a new GroupMember record to add a user to a public group and deleting an existing GroupMember record to remove a user.

| **Operation** | **What It Does** | **Business Impact** |
| --- | --- | --- |
| Add User to Public Group | This creates a new GroupMember record by setting:   * GroupId to {!ivar\_publicgroupid} - The ID of the public group to which the user is being added. * UserOrGroupId to {!ivar\_userid} - The ID of the user being added. | This adds the specified user to the specified public group, enabling them to receive relevant communications or access. |
| Remove User from Public Group | This deletes a GroupMember record where:   * Id equals {!p\_groupmemberid} - The ID of the GroupMember record to be deleted. | This removes the specified user from the public group, revoking their access or removing them from relevant communications. |

The flow starts by retrieving the GroupMember record for the specified user and public group. If the record exists, it means the user is already a member, and 'P groupmemberid' is populated. Based on the 'Ivar Action', it either adds the user if they are not a member and the action is 'Add', or removes them if they are a member and the action is 'Remove'. This logic ensures that the user's membership in the public group is correctly managed according to the input parameters.

**2. Technical Details**

**Flow Information**

|  |  |
| --- | --- |
| **Property** | **Value** |
| **API Name** | Add\_or\_Remove\_User\_from\_Public\_Group |
| **Version** | 1 |
| **Type** | AutoLaunchedFlow |
| **Description** | Input var: userid, groupid, Action ('Add','Remove') |

**Trigger Configuration**

No trigger configuration found.

**3. Flow Analysis**

**Variables**

|  |  |  |
| --- | --- | --- |
| **Variable Name** | **Data Type** | **Description** |
| ivar\_Action | String | Input Variable |
| ivar\_publicgroupid | String | Input Variable |
| ivar\_userid | String | Input Variable |
| p\_groupmemberid | String | No description |

**Decision Logic**

**Add or Remove User ?**

|  |  |
| --- | --- |
| **Rule** | **Conditions** |
| AddUser | * ivar\_Action equals Add * p\_groupmemberid is empty true |
| RemoveUser | * ivar\_Action equals Remove * p\_groupmemberid is empty false |

**Record Operations**

No record operations defined in this flow.

**Screens**

No screens defined in this flow.

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**Access Request - User Update Documentation**

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**1. Business Overview**

**SECTION 1: BUSINESS PURPOSE**

The "Access Request - User Update" flow is designed to update a user's profile information based on an access request. This flow automates the process of assigning a specific profile to a user when their access request is approved.

The flow exists to streamline the user access management process by automatically updating user profiles when access requests are processed. This eliminates the need for manual updates, reducing administrative overhead and minimizing the risk of errors.

The benefits of this flow include:

1. Automated user profile updates, ensuring consistency and accuracy in user access management.
2. Reduced administrative burden, as manual updates are no longer required.
3. Improved efficiency in processing access requests, leading to faster turnaround times for users.

**SECTION 2: TECHNICAL EXPLANATION**

### 2.1 Decision Logic

This flow does not contain any decision elements.

### 2.2 Loops

This flow does not contain any loops.

### 2.3 Assignments

This section explains how the flow sets or updates variable values.

| **Assignment** | **What It Does** | **Business Purpose** |
| --- | --- | --- |
| Set Request User | Sets two fields on the 'Requested\_For\_User' variable:   * ProfileId to the value of 'PA\_Profile\_Id' * Profile\_Approval\_\_c to the value of 'Access\_Request.Profile\_Approval\_\_c' | This assignment updates the user's profile information based on the access request details, ensuring that the user's profile is correctly configured according to the request. |

### 2.4 Record Updates & Creates

This section explains how the flow modifies Salesforce data.

| **Operation** | **What It Does** | **Business Impact** |
| --- | --- | --- |
| Update Request User | This updates a User record by referencing the 'Requested\_For\_User' variable, which contains the updated profile information. | This ensures that the user's profile is updated in Salesforce according to the access request, maintaining accurate and up-to-date user information. |

### Additional Technical Details

The flow starts by looking up an "Access\_Request\_\_c" record based on the provided 'AR\_Id'. It retrieves the 'Requested\_For\_\_c' and 'Profile\_Approval\_\_c' fields from this record.

It then looks up a User record based on the 'Requested\_For\_\_c' field from the Access Request, retrieving the user's 'ProfileId' and 'Id'.

The flow uses the 'PA\_Profile\_Id' input variable to determine the new profile to be assigned to the user.

The sequence of operations is as follows:

1. Lookup Access Request ('Lookup\_AR')
2. Lookup Requested User ('Lookup\_Request\_User')
3. Set Request User ('Set\_Request\_User')
4. Update Request User ('Update\_Request\_User')

This flow is an AutoLaunchedFlow, meaning it can be invoked programmatically without user interaction. It requires three input variables: 'AR\_Id', 'PA\_Profile\_Id'. The flow is currently active and has been designed to run in a specific context, likely as part of a larger process or integration within the Salesforce environment.

**2. Technical Details**

**Flow Information**

|  |  |
| --- | --- |
| **Property** | **Value** |
| **API Name** | AR\_User\_Update\_Flow |
| **Version** | 2 |
| **Type** | AutoLaunchedFlow |
| **Description** | Access Request process to set the requested profile on the user record - autolaunch version |

**Trigger Configuration**

No trigger configuration found.

**3. Flow Analysis**

**Variables**

|  |  |  |
| --- | --- | --- |
| **Variable Name** | **Data Type** | **Description** |
| Access\_Request | SObject (Access\_Request\_\_c) | No description |
| AR\_Id | String | Input Variable |
| PA\_Profile\_Id | String | Input Variable |
| Requested\_For\_User | SObject (User) | No description |

**Decision Logic**

No decisions defined in this flow.

**Record Operations**

**Record Updates**

**Update Request User (Unknown)**

**Screens**

No screens defined in this flow.

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