

Task - 1)

Configure Start

Select the object whose records trigger the flow when they're created, updated, or deleted.

Object: Chat Transcript

Configure Trigger

Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements: All Conditions Are Met (AND) [New](#) Formulas for Conditions [?](#)

Field	Operator	Value
Status	Equals	Completed

[+ Add Condition](#)

When to Run the Flow for Updated Records:

- Every time a record is updated and meets the condition requirements
- Only when a record is updated to meet the condition requirements

Optimize the Flow for:

Fast Field Updates: Update fields on the record that triggers the flow to run. This high-performance flow runs **before** the record is saved to the database.

Actions and Related Records: Update any record and perform actions, like send an email. This more flexible flow runs **after** the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

[Cancel](#) [Done](#)

Edit Update Records

Update Salesforce records using values from the flow.

update case record (update_case_record) [?](#)

How to Find Records to Update and Set Their Values:

- Use the chat transcript record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Update Records of This Object Type:

Object: Case

Filter Case Records:

Condition Requirements to Update Records:

All Conditions Are Met (AND)

Field	Operator	Value
Id	Equals	\$Record > Case ID > Case ID X

[+ Add Condition](#)

Set Field Values for the Case Records:

Field	Value
Status	Closed

[+ Add Field](#)

[Cancel](#) [Done](#)

Task -2)

Agent Summary

AGENT	STATUS	ACTION	WORK SUMMARY	STATE	LOGIN	ACCEPT	CAPACITY	WORKLOAD	CHANNELS	ASSIGNED QUEUES	SKILLS
Agent One	Available - Chat since Sep 25, 2022, 9:57:27 PM	Change Status Monitor	1 Chat Transcript 00000002 Chat team Chat Setup Flow 122.50.200.157	42 s	42 s	14 s	33%	1 / 3	Web Support	Web Support	

1 - 1 of 1 Display 10 records per page Previous Next Page 1

History Omni-Channel (Offline)

Recently Viewed

- Omni-Channel
- Available - Chat
- You have no active requests.
- New (0) My work (1)

Conversation

Hi fdgsdg - 9:58:59 PM

fdgsdg - 9:58:59 PM

Whisper from Piyush Dhaked - 9:59:12 PM
Whisper message

Whisper message Agent O - 9:59:22 PM

End Chat

Type a message...

Contact Details

Name: fdgsdg sdgsdg
Title: Account Name
Email: Phone:

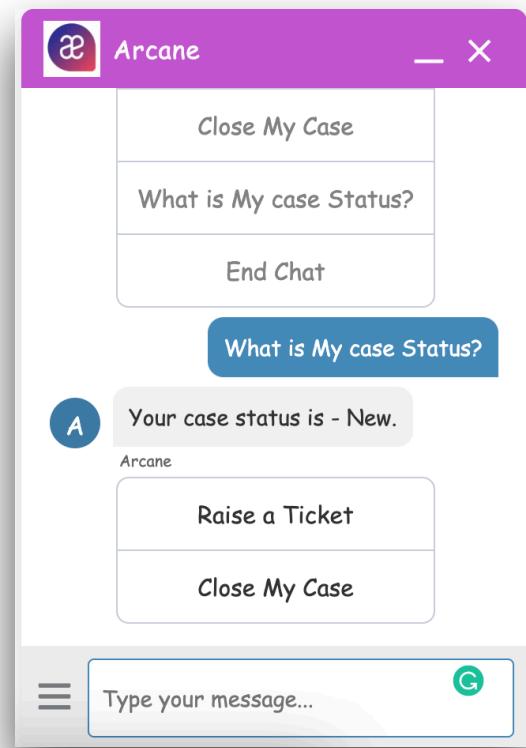
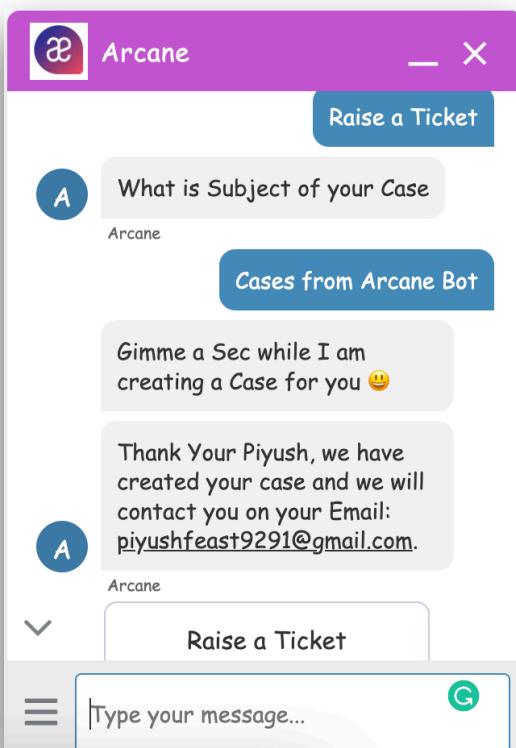
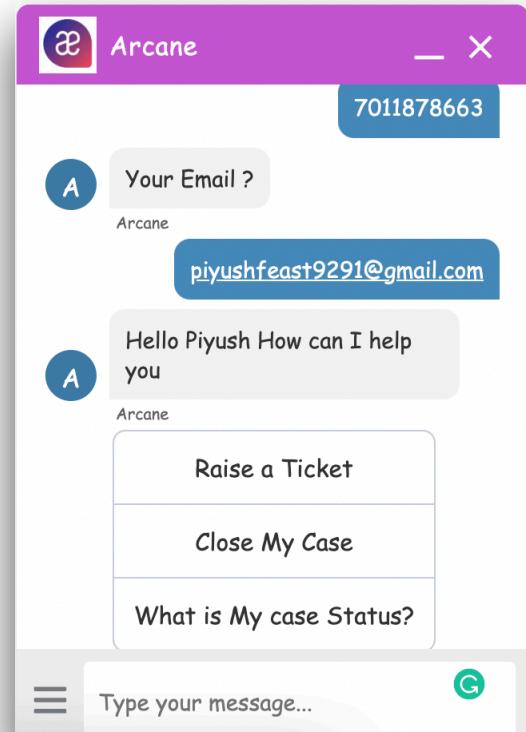
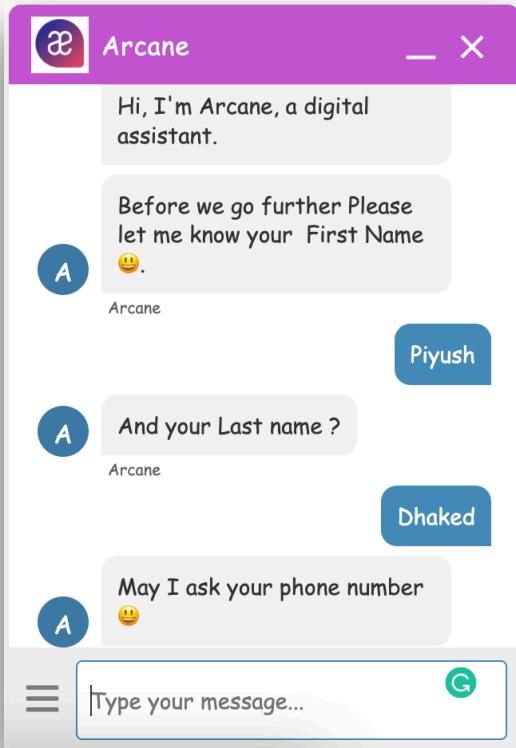
Chat Transcript Details

00000002
Chat Button: Chat_team Deployment: live_agent_setup_flow
Visitor IP Address: 122.50.200.157

Case Details

Link a related record.
Search cases...

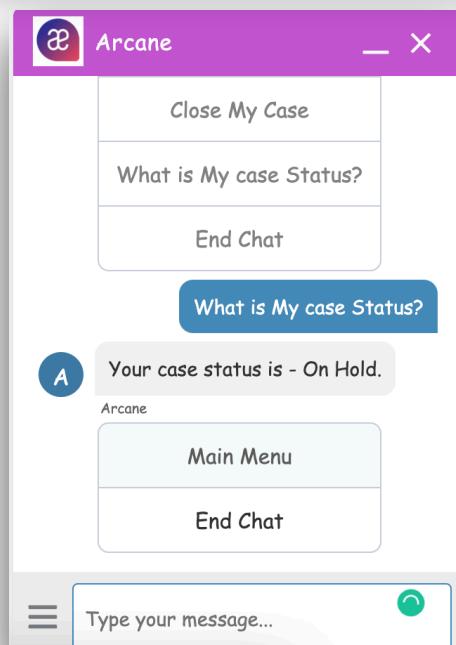
History Omni-Channel (Online)

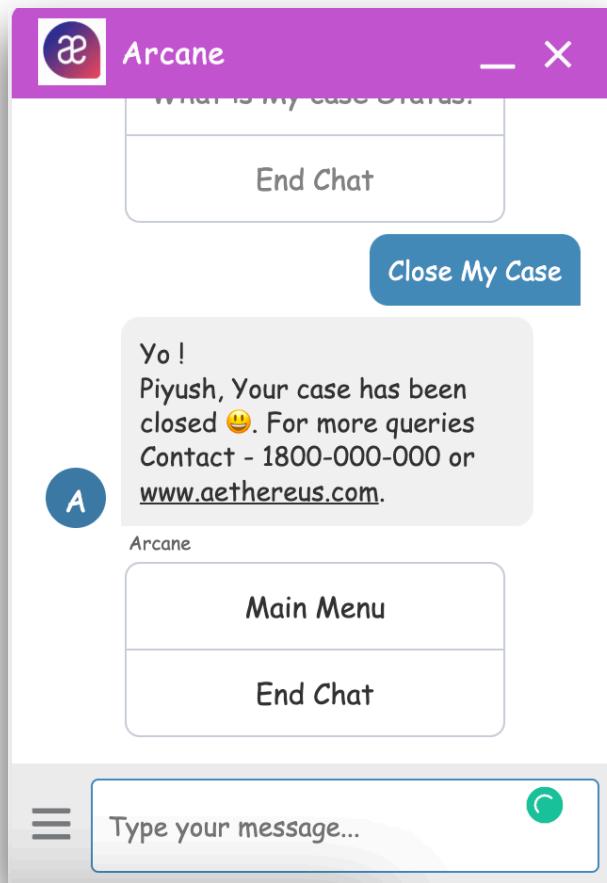
EINSTEIN BOT**In one chat attempt**

This screenshot shows the Service Cloud Case Details page for Case Number 00001164. The status is listed as 'New'. The interface includes a sidebar with 'Case Details' and a main panel with tabs for 'Feed', 'Details', and 'Jewels'. A 'Case History' sidebar on the right lists various quick links.

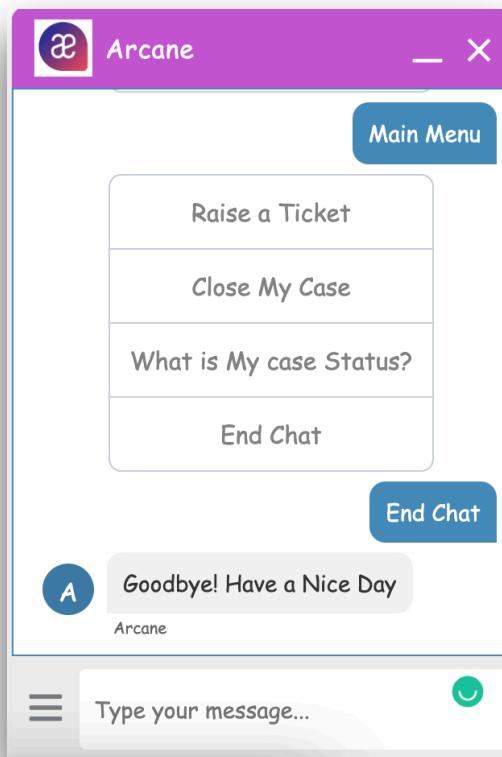
Then I manually Changed status to On Hold.

This screenshot shows the Service Cloud Case Details page after the status was manually changed to 'On Hold'. A green success message box at the top center says 'Status changed successfully.' The status in the main panel is now 'On Hold'. The 'Case History' sidebar shows the change was made by 'Piyush Dhaked' on 9/26/2022, 6:14 PM.





This screenshot shows the Service Cloud Case Details page for Case Number 00001164, which is currently closed. The left sidebar displays basic case details: Case Number 00001164, Case Owner Platform Integration User, Status Closed, Priority Medium, Subject Cases from Arcane Bot..., and Description. The main content area shows the case record with fields for Priority (Medium), Status (Closed), Case Number (00001164), and Created By (Platform Integration User, 9/26/2022, 6:12 PM). A status bar at the bottom indicates the case is now "Closed". To the right, the Case History panel shows a single entry for the status change, and the Related List Quick Links panel lists various案点 like Case Milestones, Jewels, Open Activities, Activity History, Case Comments, and Attachments.



Screenshot of the Service Cloud interface showing a case record for a bot interaction.

Case Details:

- Case ID: 00001164
- Priority: Medium
- Status: Closed
- Case Number: 00001164
- Created By: Platform Integration User, 9/26/2022, 6:12 PM

Status Bar: New > Working > Escalated > In Progress > On Hold > Waiting for... > Response... > **Closed**

Case History (1):

- Date: 9/26/2022, 6:14 PM
- Field: Status
- User: Piyush Dhaked
- Original Value: New
- New Value: On Hold

Related List Quick Links:

- Case Milestones (0)
- Jewels (0)
- Open Activities (0)
- Activity History (0)
- Case Comments (0)
- Attachments (0)

END OF ASSIGNMENT