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## About **the Author**



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**Live, eat, and breathe Salesforce**

- Salesforce **Certified Veteran**
- **Strategist** of ISV & OEM Apps, Salesforce **Solution Consultant**
- Experienced Business **Process Implementation Expert** | 8years, 500+ Implementations
- Salesforce **Evangelist, Speaker** at multiple Salesforce and Product Events
- Upcoming **Author** of *"11 Blunders of Bleeding Money with Salesforce Partners"*

# About Us



## How to make Flows for a Chatter Post in Salesforce

### How to Post on a Record's Chatter Feed

Remember that you can only post to the record's Chatter feed if 'feed tracking' is enabled for the object with which the process is associated.

Fill in the relevant fields to add the action to your process once you've created an 'action' and selected **Post to Chatter** as the action type.

**Step 1:** Enter a name for this action.

The text will appear on the canvas so you can differentiate it from other actions you have in your process. The name truncates so it fits the canvas.

**Step 2:** In the 'Post to' field, select this Record.

### Step 3: Type the message that you want to post on Chatter.

You can add a topic, insert merge fields, and mention users or groups.

This message can contain up to 10,000 characters.

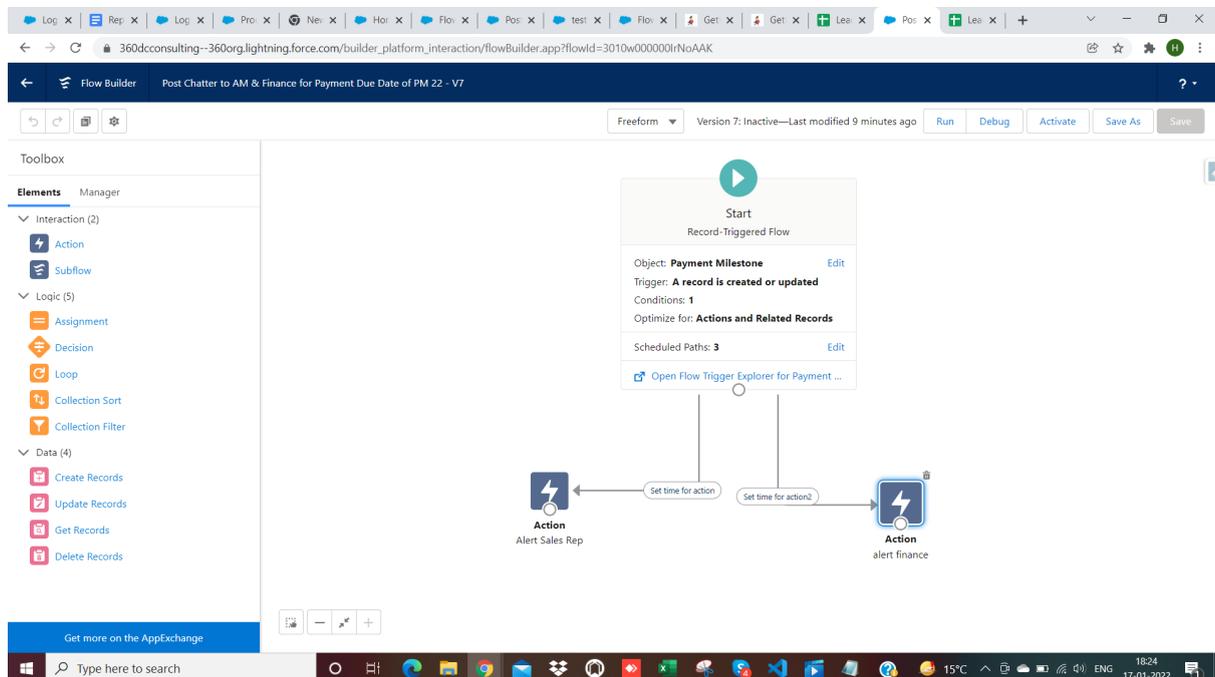
Remember, you can only reference topics that already exist. If you try to reference a merge field that doesn't have a value, it will appear as a blank value.

### Step 4: Save the action.

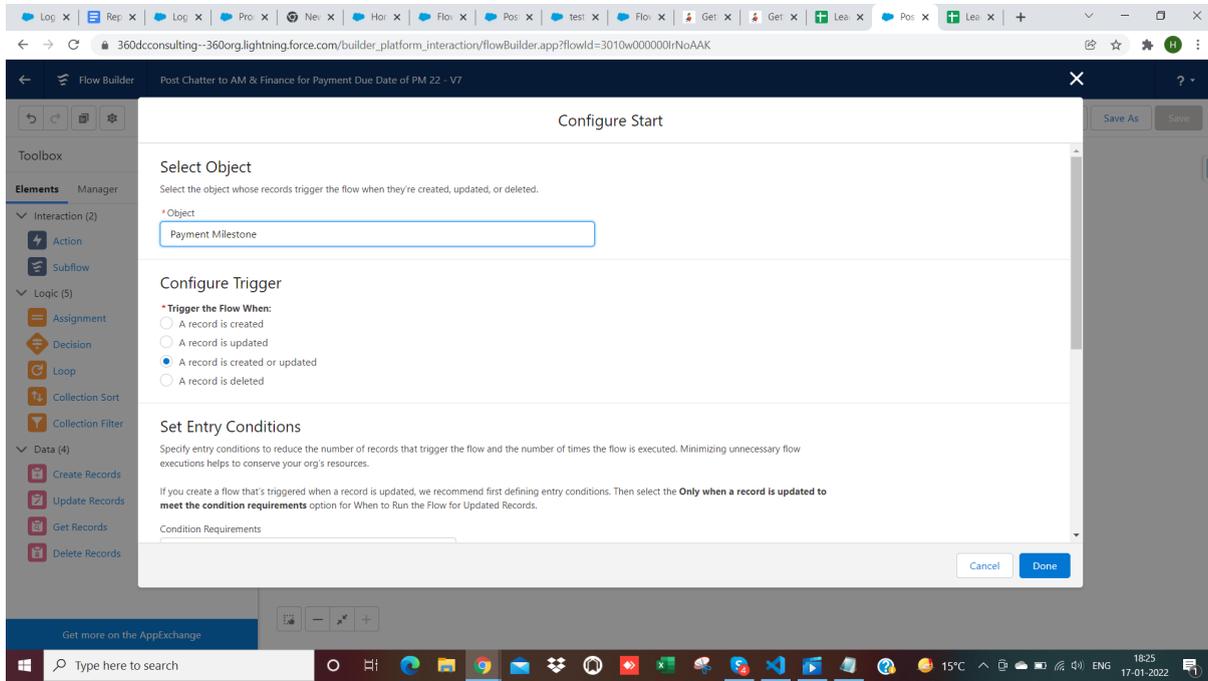
Chatter posts can also be accessed over the Salesforce Mobile app. You'll get notified about the Chatter posts over the app.

## How to automate notifications with Flows

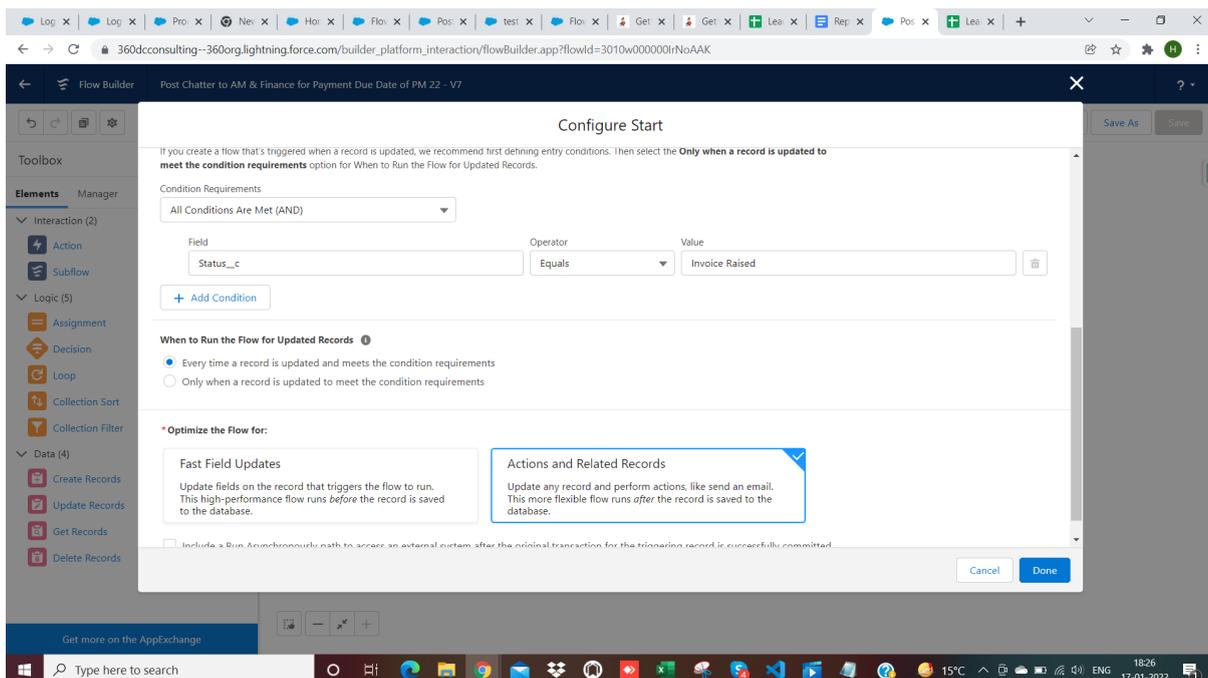
### Step 1: Open the Flow Builder in Salesforce and start creating a Flow



**Step 2:** Once you've started a flow, configure the start of the flow by configuring triggers on an object. In the given figure, we're triggering the flow when a payment milestone record is created.



### Step 3: Set up the conditions that set off the flow



The screenshot shows the 'Configure Scheduled Paths' dialog box in Salesforce Flow Builder. The dialog is titled 'Configure Scheduled Paths' and contains the following elements:

- SCHEDULED PATHS:** A list with one entry 'Run Immediately' and a '+ Add' button.
- Set time for action:** A dropdown menu.
- Set time for action2:** A dropdown menu.
- SCHEDULED PATH DETAILS:**
  - \* Path Label:** 'Set time for action'
  - \* API Name:** 'Set\_time\_for\_action'
  - \* Time Source:** 'Payment\_Milestone\_c: Invoice Due Date'
  - \* Offset Number:** '2'
  - \* Offset Options:** 'Days Before'
- Advanced Options:** A link to expand more options.
- Buttons:** 'Delete Path', 'Cancel', and 'Done'.

The background shows the Flow Builder interface with a flow named 'Post Chatter to AM & Finance for Payment Due Date of PM 22 - V7'.

This is a duplicate of the screenshot above, showing the 'Configure Scheduled Paths' dialog box in Salesforce Flow Builder. The configuration is identical to the first image, showing a scheduled path for 'Set time for action' with an offset of 2 days before.

**Configure Scheduled Paths**

Add a scheduled path if you want part of or the entire flow to run some time after the triggering record is created or updated. That scheduled time can be based on when the record is created or updated, or based on a field value in the record. A separate flow interview runs for each scheduled path. Path labels appear on connectors in the canvas. Consider using path labels such as "Run 1 Day After Case is Created" and "Run When Case is Closed".

**SCHEDULED PATHS** +

- Run Immediately
- Set time for action
- Set time for action2

**SCHEDULED PATH DETAILS** Delete Path

\* Path Label: Set time for action2      \* API Name: Set\_time\_for\_action2

\* Time Source: Payment\_Milestone\_\_c: Invoice Due Date

\* Offset Number: 2      \* Offset Options: Days Before

> Advanced Options

Cancel Done

**Edit "Post to Chatter" core action**

Use values from earlier in the flow to set the inputs for the "Post to Chatter" core action. To use its outputs later in the flow, store them in variables.

**Alert Sales Rep (Alert\_Sales\_Rep)**

**Set Input Values**

A<sub>a</sub> \* Message: {!AlertSalesRep}

A<sub>a</sub> \* Target Name or ID: {!\$Record.Id}

A<sub>a</sub> Experience Cloud Site ID:  Don't include

Target Type:  Don't include

Visibility:  Don't include

Cancel Done

The screenshot displays the Salesforce Flow Builder interface. The browser address bar shows the URL: `360dconsulting--360org.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3010w000000HNoAAK`. The main window title is "Flow Builder Post Chatter to AM & Finance for Payment Due Date of PM 22 - V7".

The "Edit 'Post to Chatter' core action" dialog box is open, showing the following configuration:

- Alert Name:** alert finance (alert\_finance)
- Set Input Values:**
  - A<sub>3</sub> \* Message:** `{!AlertFinance}`
  - A<sub>3</sub> \* Target Name or ID:** `{!$Record.Id}`
  - A<sub>3</sub> Experience Cloud Site ID:**  Don't include
  - Target Type:**  Don't include
  - Visibility:**  Don't include

The background interface shows a "Toolbox" on the left with categories: Interaction (2), Logic (5), and Data (4). The "Data" category is expanded, showing actions like "Create Records", "Update Records", "Get Records", and "Delete Records".

# Our Apps on AppExchange

▶ AppExchange Apps

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- ❖ SMS/MMS
- ❖ WhatsApp Messaging
- ❖ CTI (Calls)
- ❖ Ringless Voicemail
- ❖ Facebook Messenger
- ❖ Automated Texting
- ❖ 1-on-1 Conversation
- ❖ Link Tracking
- ❖ Bulk Texting & Scheduling
- ❖ Intelligent Texting (itext)

**Other offerings on AppExchange**



360 Merge Duplicates



360 Verify the Mail



360 Unsubscribe App



Textolic

## Thank You



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