

GET ALL AFFINITY RECORDS (child accounts)

Edit Get Records

Find Salesforce records and store their field values in flow variables.

Get All Affinity Accounts (Get_All_Affinity_Accounts)

Get Records of This Object

* Object

Legal Entity ID

Filter Legal Entity ID Records

Condition Requirements

All Conditions Are Met (AND) ▼

Field

Affinity_Account__c

Operator

Equals ▼

Value


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+ Add Condition

Sort Legal Entity ID Records

Sort Order

Not Sorted ▼

 If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

- Only the first record
- All records

How to Store Record Data


- Automatically store all fields
- Choose fields and let Salesforce do the rest
- Choose fields and assign variables (advanced)

Cancel

Done

Edit Loop

Start a loop path for iterating over items in a collection variable. For each iteration, the flow temporarily stores the item in the loop variable.

Loop through each Affinity Account (Loop_through_each_Affinity_Account) 

Select Collection Variable

* Collection Variable

{!Get_All_Affinity_Accounts}

Specify Direction for Iterating Over Collection

* Direction

- First item to last item
 Last item to first item




To use the current item in other elements in the loop, use the API name of the Loop element. Example: if your flow iterates over accounts with a Loop element named "My_Account_Loop" you can reference the current item from that loop element. Just start typing "My_Account_Loop" and select "Current Item from Loop My_Account_Loop".

Cancel

Done



Edit Assignment

Verify the current item in the loop (Verify_the_current_item_in_the_loop) 

Set Variable Values

Each variable is modified by the operator and value combination.



Variable

 Current Item from Loop Loop_through... 


Operator

Equals 

Value

 Current Item from Loop Loop_through... 




 Add Assignment

Cancel

Done



Edit Assignment

Build Affinity Account List (Build_Affinity_Account_List) 

Set Variable Values

Each variable is modified by the operator and value combination.


Variable

 var_AffinityAccountList 

Operator

Add 

Value

 Current Item from Loop Loop_through...  

 Add Assignment

Cancel


Done

Edit Apex Action

Use values from earlier in the flow to set the inputs for the "Automate Screening" Apex action. To use its outputs later in the flow, store them in variables.

Run KYC (Run_KYC2) 

Set Input Values for the Selected Action

*enableMonitoring 

{!\$GlobalConstant.False}



Account



Enter value or search resources...




A value is required.

enableNameTransposition




Don't Include





Don't Include





Don't Include





Don't Include





Don't Include

Cancel

Done