ADA Wallet for Salesforce v0.1

Web3 Enabler

Admin Guide, Package Installation Guide and User Guide

Preface

Web3 Enabler ADA Wallet for Salesforce is a Salesforce native Cardano wallet component.

Administrators or financial advisors do not need to be Web3 knowledgeable to use ADA Wallet for Salesforce.

We urge Salesforce Administrators to read through this entire document at least twice. If you are new to Web3, some of the details may be unfamiliar to you. If you are experienced with Web3, you may find some of the simplifications we make in the interface shocking. We have focused on making the process as accessible as possible for individuals with all levels of blockchain and crypto understanding.

Table of Contents

Overview

This user guide outlines the processes to install, configure, and use ADA Wallet for Salesforce.

This user guide provides the basic tools to understand and operate ADA Wallet for Salesforce rather than advanced solutions.

Installation Guide Quick Start

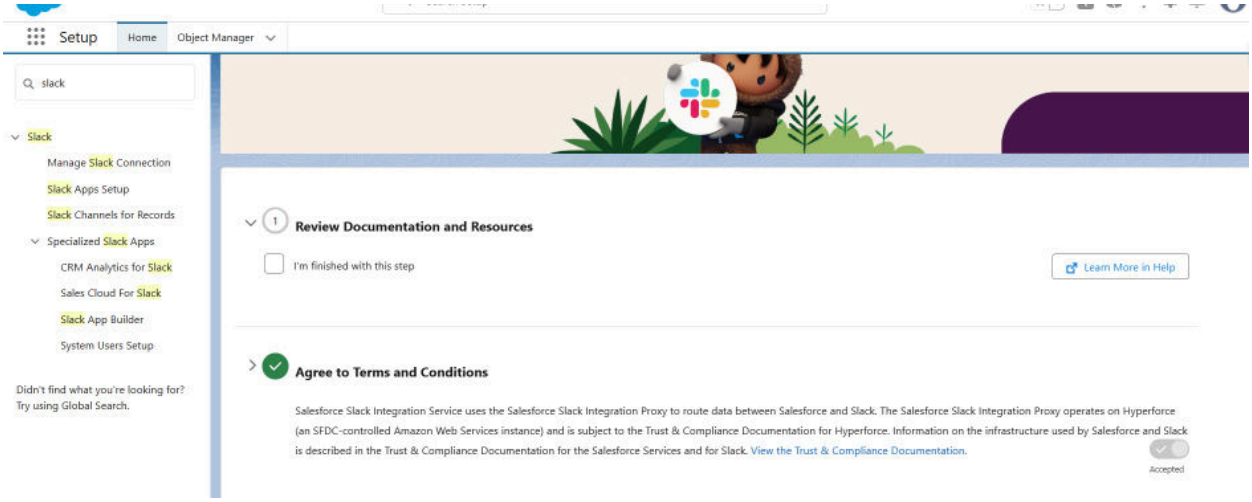
Prerequisites

1. Slack Apps Setup done in your Salesforce org
2. Administrator access to the org

Pre-deployment checklist

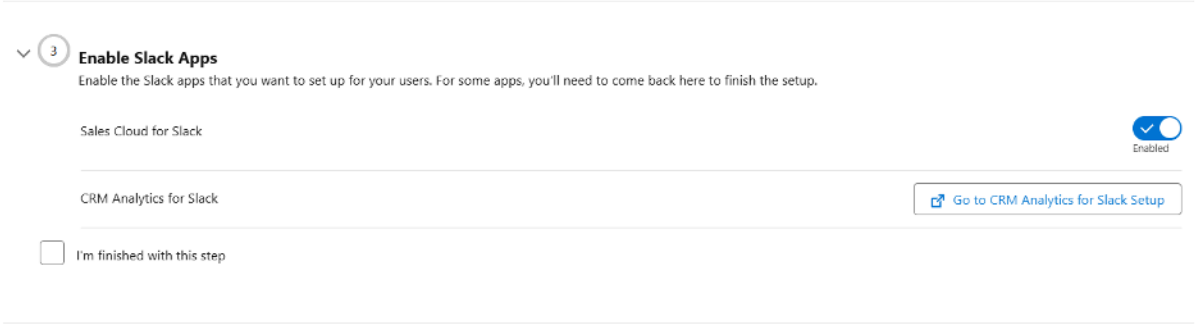
Accept the Slack terms in Salesforce

- Navigate to Setup → Slack Apps Setup.
- Read and accept the Terms & Conditions.



Turn on the core Slack features

- Still in Slack Apps Setup, click Enable Slack Apps.
- Toggle Sales Cloud for Slack to On.



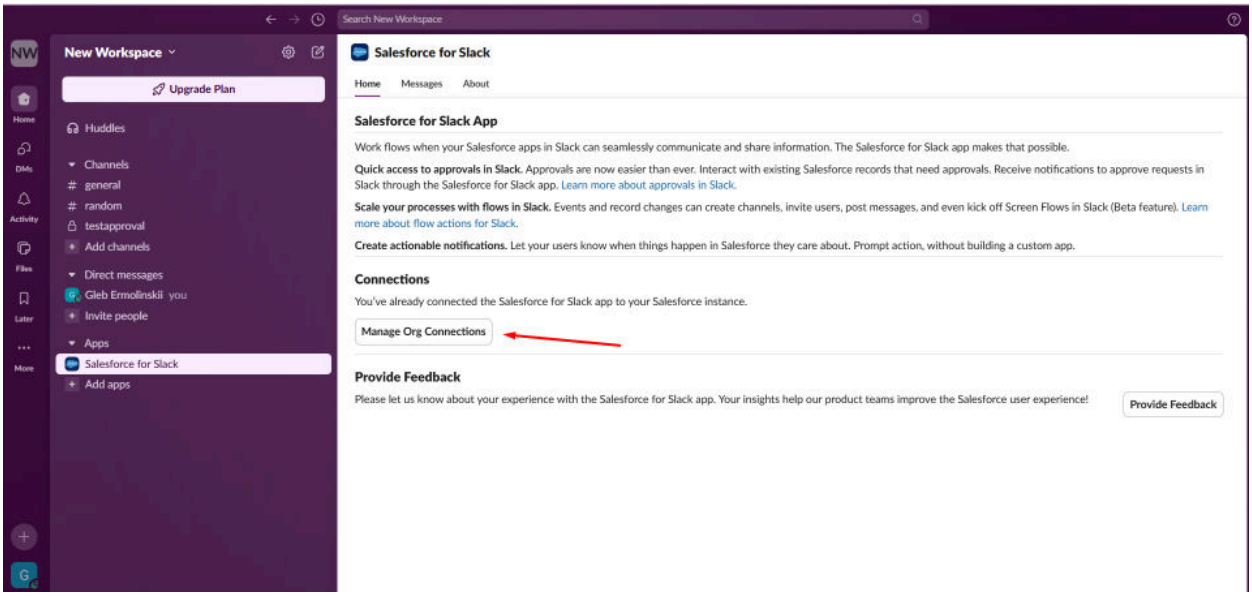
Grant the required permission sets to your user

- Go to Setup → Users → [your user] → Permission Set Assignments.
- Click Edit Assignments and add:
  - Sales Cloud for Slack
  - Slack Sales Home User

Install the Salesforce for Slack app in the workspace

- Return to Setup → Slack Apps Setup and complete step 6 · Install Slack Apps → Install Salesforce for Slack.

- In Slack, open Salesforce for Slack → Manage org connections and click Connect new org to authorise the connection.



Installing ADA Wallet for Salesforce

Installation.

- Navigate to the Salesforce AppExchange and search for "ADA Wallet for Salesforce."
- Click **Get It Now**, select your org, and follow the installation wizard to complete the process.

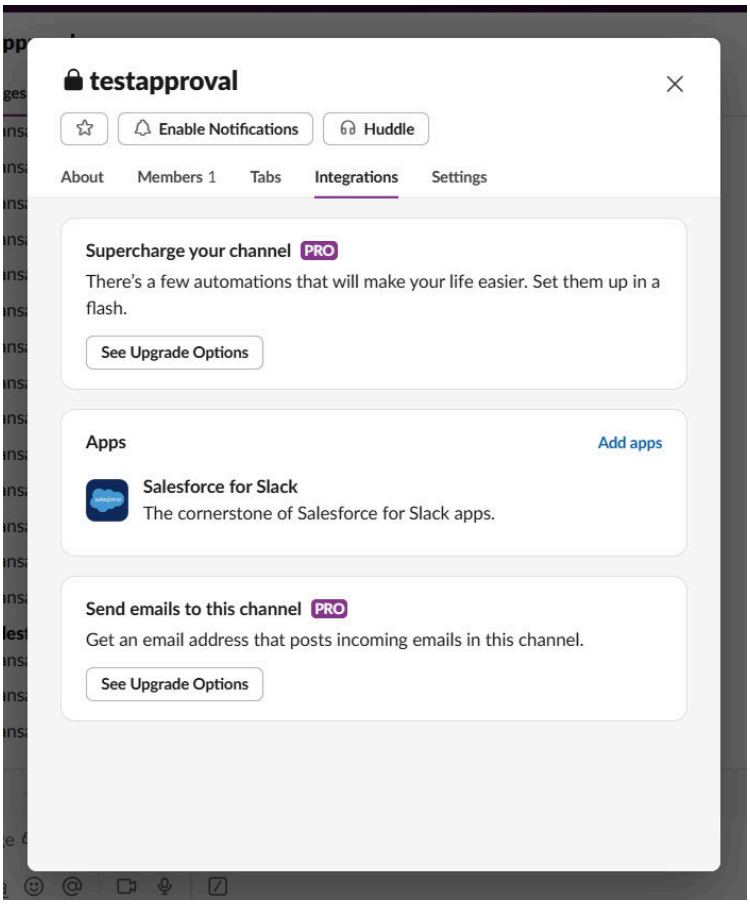
Installation. Post-deployment checklist

1. Assign ADA Wallet Admin Permissions

- In Salesforce Setup, navigate to Users > Permission Sets.
- Locate and assign the Ada_Wallet_Admin_Managed, Ada_Wallet_Seed_Phrase and Ada_Wallet_Payment permission sets to your user for full access.

Assign this to all administrators managing the wallet for streamlined access.

2. Create Slack Settings in Salesforce
   - Go to Setup → Custom Settings → Slack Settings → Manage → New.
   - Enter:
     - Slack App ID
     - Slack Channel ID (the channel that will receive notifications)
     - Slack Workspace ID
3. (Optional) Send notifications to a private Slack channel
   - Open the private channel → View members → Integrations → Add apps.
   - Add Salesforce for Slack to the channel.



4. Create Email Settings in Salesforce
   - Go to Setup → Custom Settings → Email Settings → Manage → New.
   - Enter:
     - Accounting email (to receive notifications)

Your Salesforce org is now fully connected to your Slack workspace, and notifications can flow between the two systems.

Permission Sets

The following Salesforce permission sets are required for a Salesforce Administrator to set up ADA Wallet for Salesforce in a Salesforce Scratch Org.

1. Ada_Wallet_Admin_Managed - Full administrative access
    - Create Wallet Sets and Wallets
    - Access all wallets regardless of ownership
    - View/Modify All Data access
    - Full access to all Lightning Web Components
2. Ada_Wallet_Manager_Managed - Management-level access
    - Create Wallet Sets and Wallets
    - Access wallets owned by self or subordinates
    - No View/Modify All Data access
    - Full LWC access
3. Ada_Wallet_Standard_User_Managed - Standard user access
    - Cannot create Wallet Sets or Wallets
    - Use existing wallets owned by self or subordinates
    - Create transactions for permitted wallets
    - Full LWC access for wallet operations
4. Ada_Wallet_Seed_Phrase - Sensitive operations access
    - Access to view and manage seed phrases
    - Access to view private keys
    - Required for organization encryption key management
5. Ada_Wallet_Payment - Sensitive operations access
    - Access to view and manage UTXO addresses private and public keys and payment key hash
    - Required for organization encryption key management

Administrator Guide

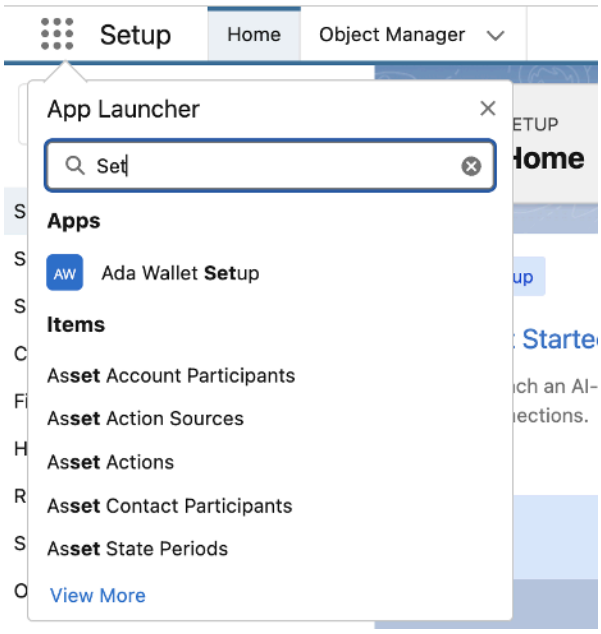
Salesforce Application Administrator Guide: Initial Setup and Configuration

This guide provides detailed instructions for a Salesforce Administrator to set up and configure the Ada Wallet Setup application in Salesforce. Follow these steps carefully to ensure proper configuration and secure operation.

1.1 Accessing the Setup Application

To begin configuring the Ada Wallet Setup application, follow these steps:

1. **Navigate to the App Launcher**: Click the nine-dot icon in the top-left corner of the Salesforce interface.
2. **Search for Setup**: In the App Launcher, search for "Setup" and click the "Setup" option to open the Ada Wallet Setup application.
3. **Verify the Main Setup Page**: The main setup page should display with the title **"Ada Wallet Setup"** and several configuration sections organized in accordion format.



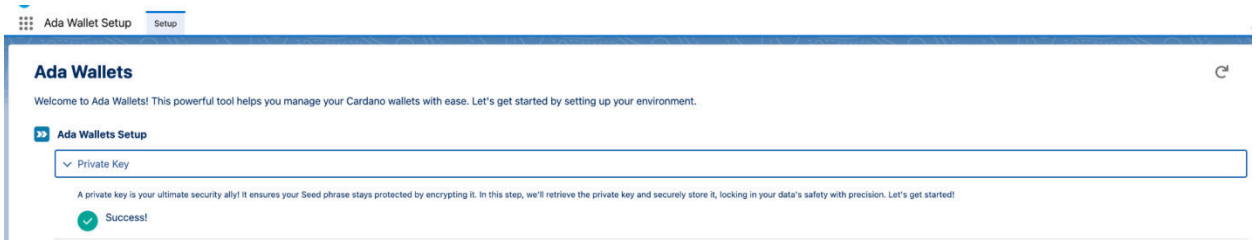
1.2 Private Key and HMAC Key Setup

This section guides you through generating and securely storing the private key and HMAC key, which are critical for encrypting your seed phrase.

1. **Locate the Section**: Find the **"Private Key and HMAC Key"** section (first accordion).
2. **Expand the Section**: Click to expand the accordion.
3. **Read the Instructions**: You will see the message:
   "A private key and HMAC key are your ultimate security allies! They ensure your Seed phrase stays protected by encrypting it. In this step, we'll retrieve both the private key

and HMAC key and securely store them, locking in your data's safety with precision. Let's get started!"

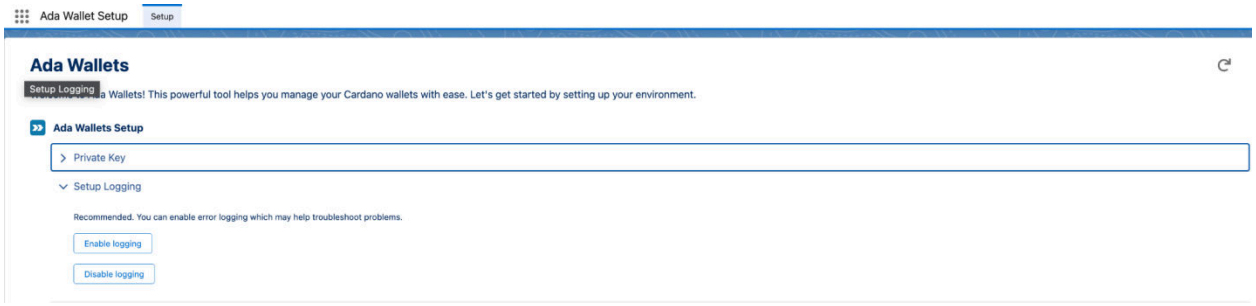
4. **Generate Keys**: Click the **"Generate Private Key & HMAC Key"** button.
   Note: This button is only visible to users with the **"ADA Wallet Seed Phrase And Wallet Keys"** permission set.
5. **Automatic Generation**: The system will automatically generate both the private key and HMAC key.
6. **Secure Storage**: **CRITICAL**: Copy the generated keys and store them in a secure location.
7. **Confirmation**: A **"Success!"** message will appear upon completion.



1.3 Logging Configuration

Configure error logging to assist with troubleshooting issues in the application.

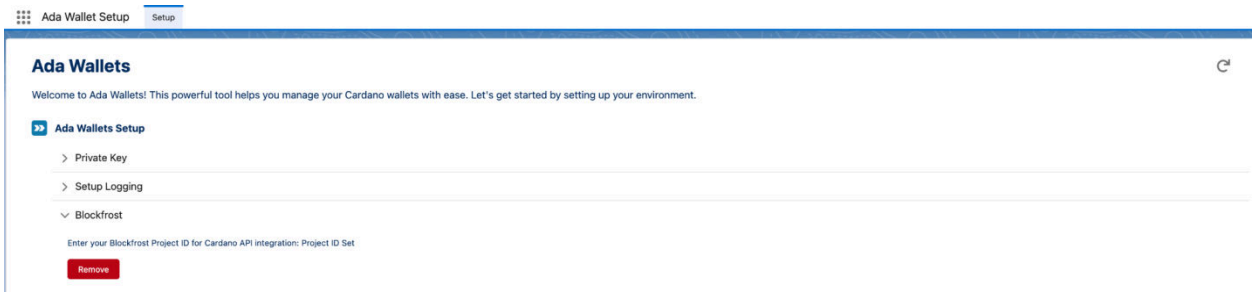
1. **Locate the Section**: Find the **"Setup Logging"** section (second accordion).
2. **Expand the Section**: Click to expand the accordion.
3. **Read the Instructions**: You will see the message:
   "Recommended. You can enable error logging which may help troubleshoot problems."
4. **Enable Logging**: Click the **"Enable Logging"** button to activate error logging.
5. **Confirmation**: A **"Logging enabled."** message will appear upon completion.
6. **Optional Disable**: If needed, click the **"Disable Logging"** button to turn off logging.
7. Logging is important to keep track of and control who did a certain sensitive blockchain operation.



1.4 Blockfrost Integration Setup

Integrate your Salesforce application with the Cardano blockchain using a Blockfrost Project ID.

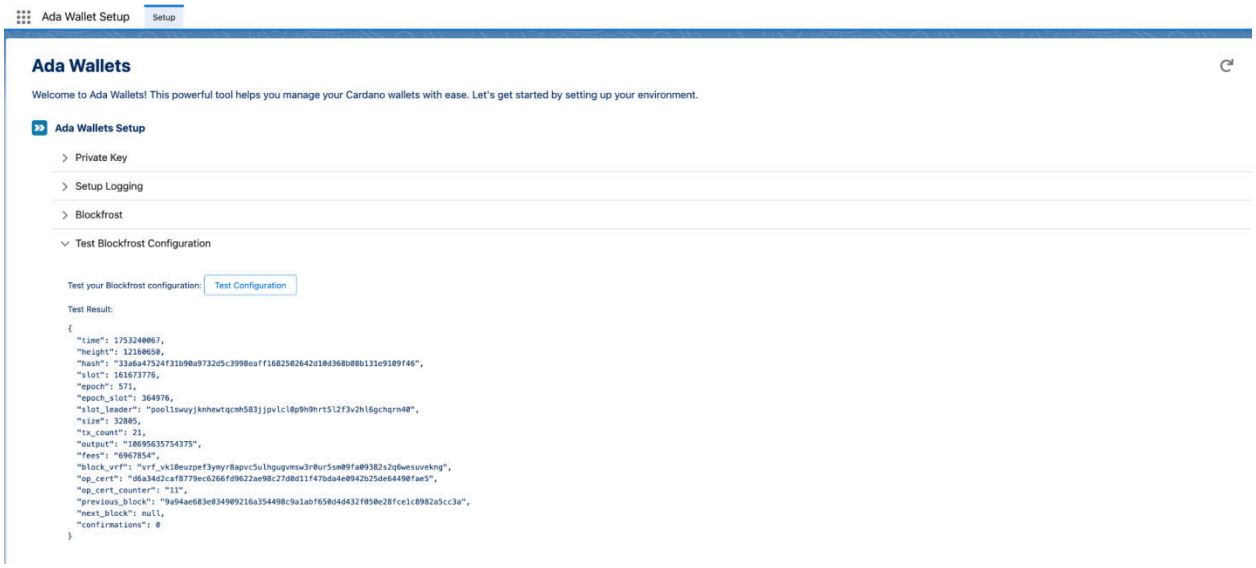
1. **Locate the Section**: Find the **"Blockfrost"** section (third accordion).
2. **Expand the Section**: Click to expand the accordion.
3. **Read the Instructions**: You will see the message:
   "Enter your Blockfrost Project ID for Cardano API integration:"
4. **Obtain a Blockfrost Project ID**:
   - Visit https://blockfrost.io.
   - Click **"Sign Up"** or **"Login"** if you already have an account.
   - After logging in, click **"Add Project"**.
   - Select the **"Cardano Mainnet"** network.
   - Name your project (e.g., "Salesforce ADA Wallet").
   - Click **"Create Project"**.
   - Copy the generated **Project ID** (e.g., mainnet_abc123def456).
5. **Enter the Project ID**: Return to Salesforce and paste the Project ID into the **"Blockfrost Project ID"** field.
6. **Save Configuration**: Click the **"Save Configuration"** button to store the Project ID.
7. **Confirmation**: A **"Project ID Set"** message will appear upon completion.



1.5 Test Blockfrost Configuration

Verify that the Blockfrost integration is functioning correctly.

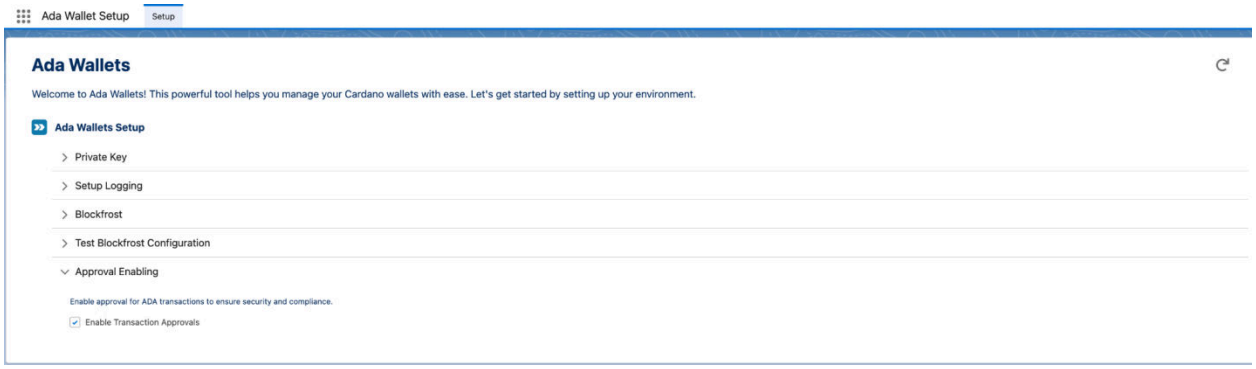
1. **Locate the Section**: Find the **"Test Blockfrost Configuration"** section (fourth accordion).
2. **Expand the Section**: Click to expand the accordion.
3. **Read the Instructions**: You will see the message:
   "Test your Blockfrost configuration:"
4. **Test the Configuration**: Click the **"Test Configuration"** button to verify the integration.
5. **View Results**: The test results will display below the button.
6. **Confirmation**: If successful, connection details and the API response will be shown.



1.6 Transaction Approval Configuration

Enable transaction approvals to enhance security and compliance for outbound transactions.

1. **Locate the Section**: Find the **"Approval Enabling"** section (fifth accordion).
2. **Expand the Section**: Click to expand the accordion.
3. **Read the Instructions**: You will see the message:
   "Enable approval for ADA transactions to ensure security and compliance."
4. **Enable Approvals**: Check the **"Enable Transaction Approvals"** checkbox to require approval for outbound transactions.
   What it does: When enabled, the approval process will:
   - Send transactions to **"Pending Approval"** status instead of **"Ready to Sign"**.
   - Route approval requests to the **Wallet Set Owner**.
   - Send Slack notifications to approvers (if Slack is configured).
   - Allow transactions to proceed only after approval.
5. **Automatic Save**: The system will automatically save the setting.
6. **Confirmation**: A success message will appear when the setting is updated.



User Guide

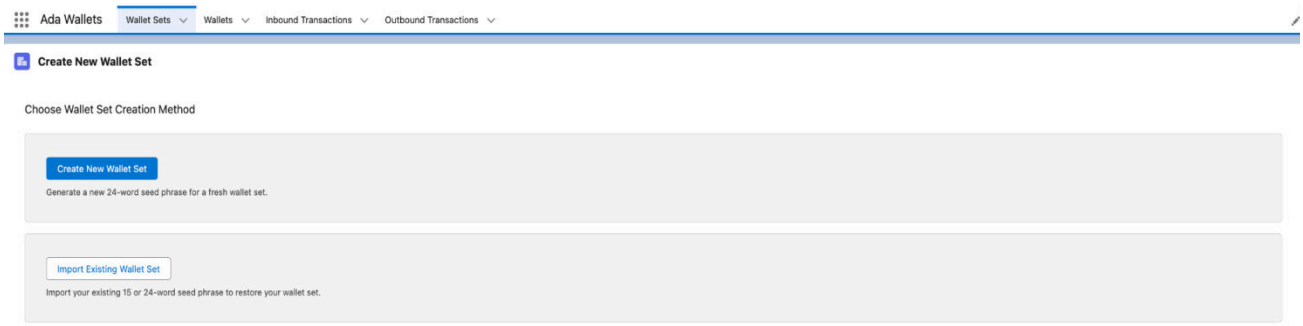
This guide provides detailed instructions on how to use Ada Wallet for Salesforce. The steps outlined in this section cover core functionality of the app. The features highlighted in the User Guide may be performed by members of a sales or accounting department, or other types of users within an organization, depending on the business use case, and not just a Salesforce Administrator.

1. Generate Seed Phrase

1.1 Opening Generate Seed Phrase

To begin generating a seed phrase for your wallet, follow these steps:

1. **Navigate to the App Launcher**: Click the nine-dot icon in the top-left corner of the Salesforce interface.
2. **Search for Generate Seed Phrase**: In the App Launcher, search for "Generate Seed Phrase" and click the option to open the application.
3. **Verify the Main Page**: You should see the main page with two options: **"Generate New Seed Phrase"** and **"Import Existing Seed Phrase"**.

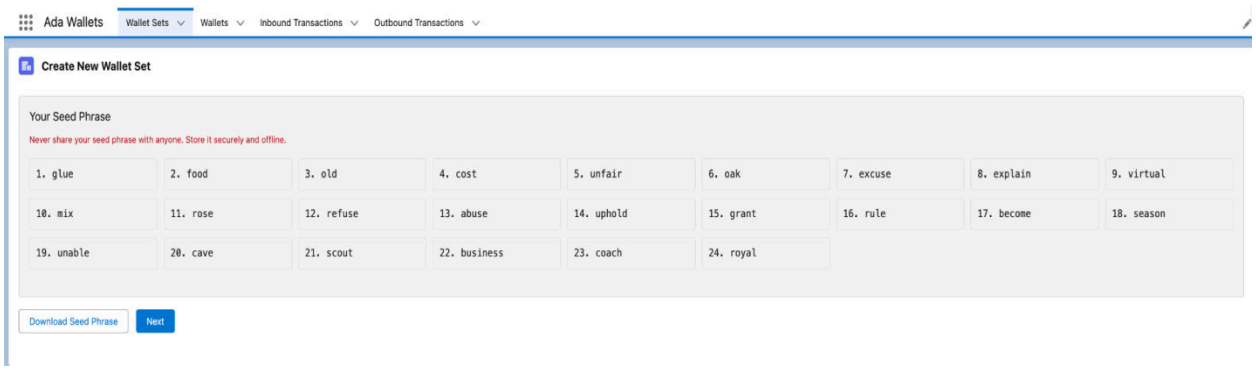


1.2 Generate New Seed Phrase

To create a new seed phrase for your wallet, follow these steps:

1. **Select Option**: Click the **"Generate New Seed Phrase"** button.
2. **Enter Wallet Name**: Enter a name for your wallet in the **"Wallet Name"** field.
3. **Select Word Count**: Choose the seed phrase length (15 or 24 words). The default is 24 words.
4. **Proceed**: Click the **"Next"** button.

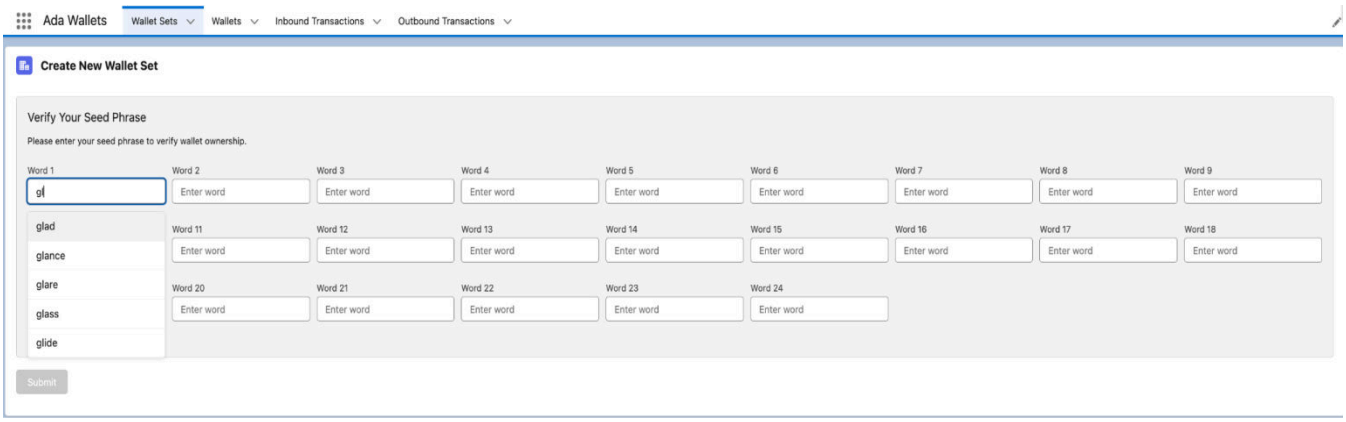
5. **View Seed Phrase**: The system will generate a 24-word seed phrase, displaying each word with its corresponding number.
6. **Secure Storage**: **CRITICAL**: Write down all 24 words in order on a secure piece of paper.
7. **Download Option**: Click **"Download Seed Phrase"** to save the seed phrase as a text file (optional but recommended).
8. **Proceed to Verification**: Click **"Next"** to proceed to the verification step.



1.3 Verify Seed Phrase

To verify the newly generated seed phrase, follow these steps:

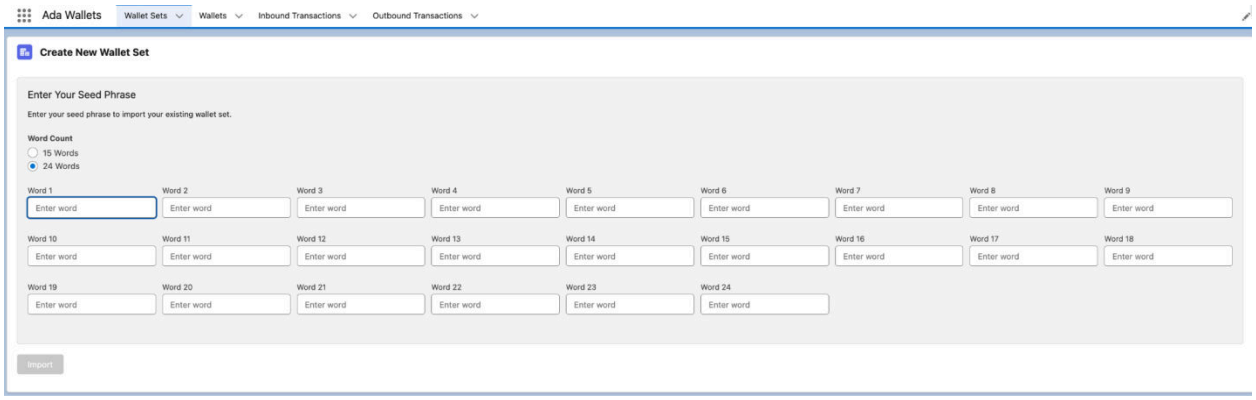
1. **Input Fields**: You will see 24 input fields labeled **"Word 1"**, **"Word 2"**, etc.
2. **Enter Words**: Enter each word from your seed phrase in the correct order.
3. **Autocomplete Assistance**: The system will provide autocomplete suggestions as you type.
4. **Submit Verification**: Click the **"Submit"** button to verify your seed phrase.
5. **Success**: If correct, the wallet set will be created, and you will be redirected to the wallet set record page.
6. **Error Handling**: If incorrect, an error message will appear, and you will need to try again.



1.4 Import Existing Seed Phrase

To import an existing seed phrase, follow these steps:

1. **Select Option**: Click the **"Import Existing Seed Phrase"** button.
2. **Enter Wallet Name**: Enter a name for your wallet in the **"Wallet Name"** field.
3. **Select Word Count**: Choose the seed phrase length (15 or 24 words) to match your existing phrase.
4. **Proceed**: Click the **"Next"** button.
5. **Enter Seed Phrase**: Enter your existing seed phrase into the 24 input fields.
6. **Autocomplete Assistance**: The system will provide autocomplete suggestions as you type.
7. **Submit Verification**: Click the **"Submit"** button to validate and import the seed phrase.
8. **Success**: If valid, the wallet set will be created, and you will be redirected to the wallet set record page.

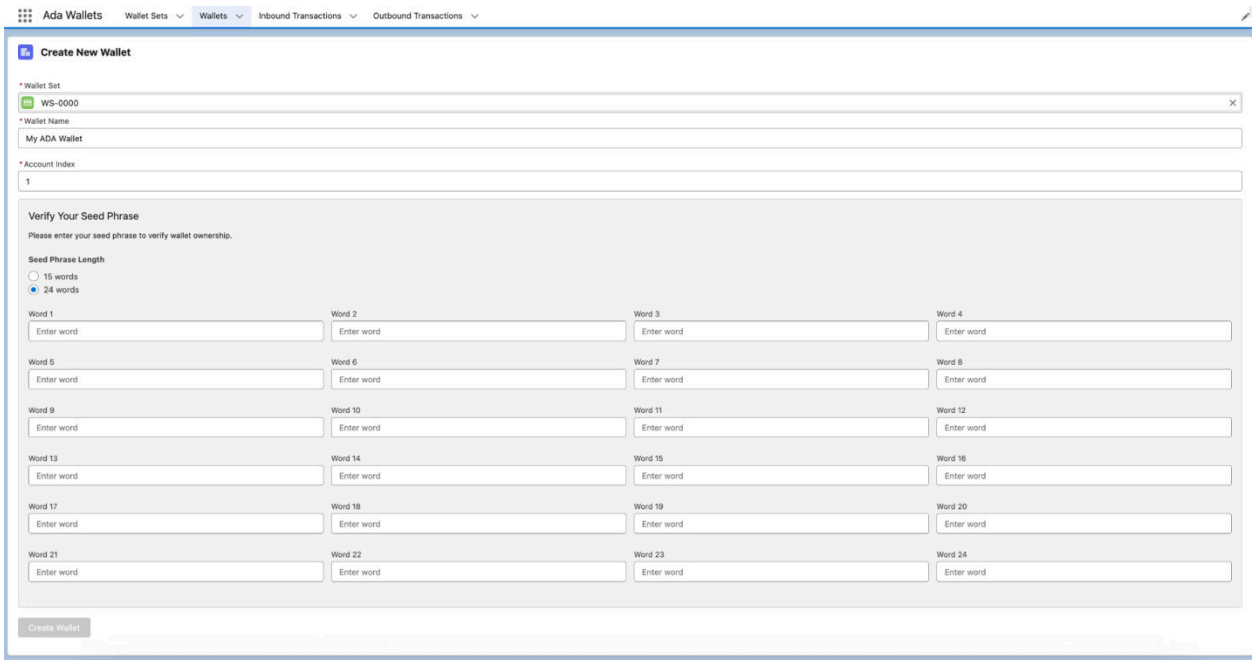


2. Creating a Wallet

2.1 Opening Create New Wallet

To create a new wallet, follow these steps:

1. **Navigate to the App Launcher**: Click the nine-dot icon in the top-left corner of the Salesforce interface.
2. **Search for Create New Wallet**: In the App Launcher, search for "Ada Wallets" and click the option.
3. **Select New from the wallets tab:** This is the flow to create a new wallet from a wallet set
4. **Enter Details:** Select the Wallet Set, Enter Wallet Name, Enter Account Index, then verify your seed phrase created earlier for the wallet set.



2.2 Create Wallet

To finalize wallet creation, follow these steps:

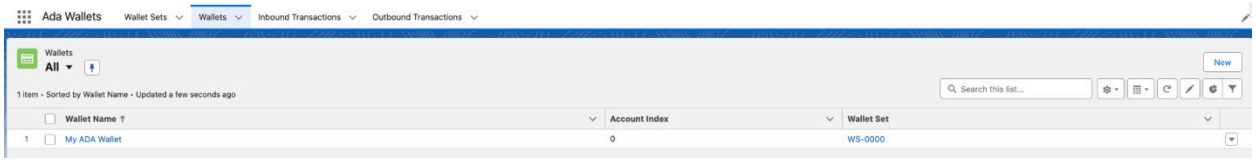
1. **Initiate Creation**: Click the **"Create Wallet"** button.
2. **Monitor Progress**: The system will display progress messages:
    - "Initializing..."
    - "Verifying Seed Phrase" (if applicable)
    - "Deriving Keys..."
    - "Creating Wallet..."
    - "Generating receiving addresses..."
    - "Generating change addresses..."
3. **Address Generation**: The system will automatically generate 20 consecutive unused receiving addresses and 20 consecutive unused change addresses.
4. **Confirmation**: A success message will appear when complete.
5. **Access Wallet**: The wallet will be created, and you will be able to access it.
6. On creation of the wallet, if used prior it will pull all Assets and Transactions for the Wallet in the system, the system also derives 20 Receiving and Change (Internal) Addresses using the UTXO model.

3. Viewing Your Wallet

3.1 Open Wallet

To view your wallet, follow these steps:

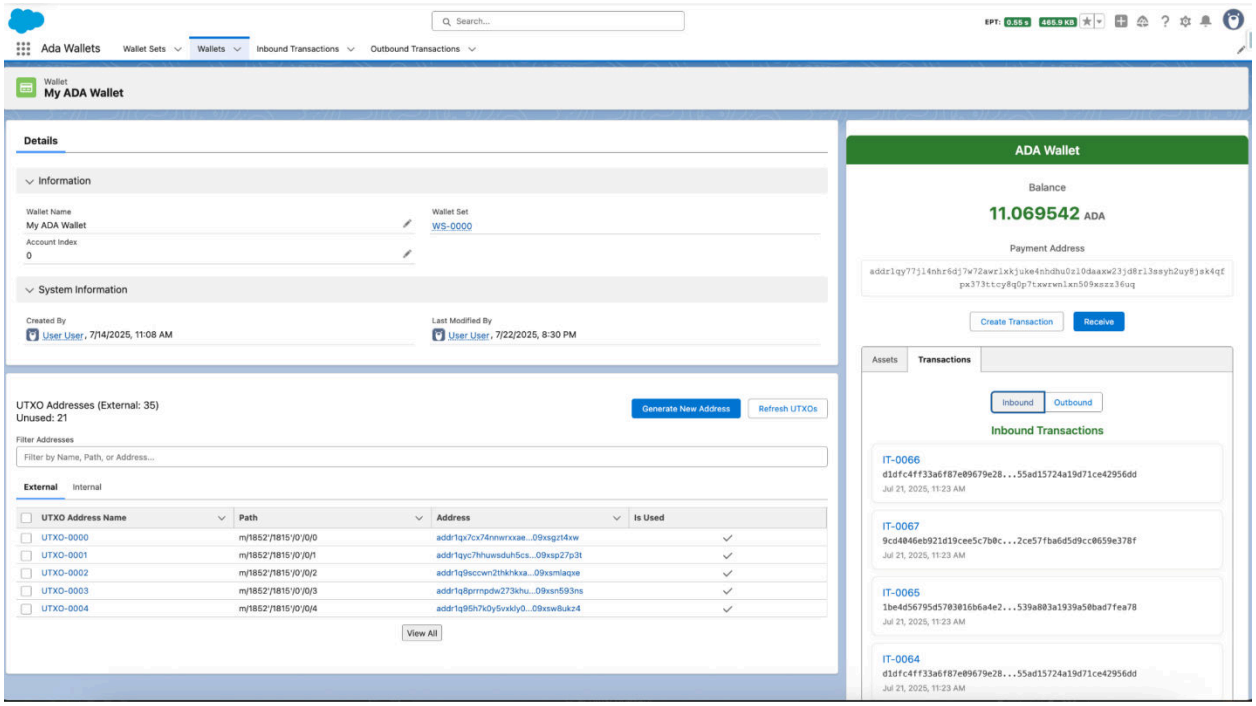
1. **Navigate to the Wallets Tab**: Search for and click the newly created wallet.
2. **Select Wallet**: Find and click on your wallet name.



3.2 Understanding Wallet Dashboard

To understand the wallet dashboard, follow these steps:

1. **View Balance**: Check your wallet balance in ADA at the top.
2. **See Payment Address**: View your main receiving address.
3. **Use Action Buttons**: Utilize the **"Create Transaction"** and **"Receive"** buttons.
4. **Navigate Tabs**: Switch between **"Assets"** and **"Transactions"** tabs.



3.3 View Assets

To view your wallet's assets, follow these steps:

1. **Access Assets Tab**: Click on the **"Assets"** tab.
2. **View Balances**: See all your ADA and native token balances.
3. **Asset Details**: Each asset displays its symbol, name, and amount.
4. **Visual Information**: Assets are shown with icons and detailed information.

3.4 View Transactions

To view your wallet's transaction history, follow these steps:

1. **Access Transactions Tab**: Click on the **"Transactions"** tab.
2. **Switch Transaction Types**: Toggle between **"Inbound"** and **"Outbound"** transactions.
3. **View Details**: Transaction details include:
    - Transaction ID (clickable link to record)
    - Transaction hash (clickable link to CardanoScan)
    - Date and time
    - Status (for outbound transactions)
    - Amounts and assets transferred
4. **View More**: Click **"View All"** to see additional transactions if available.

4. Receiving ADA

4.1 Open Receive Modal

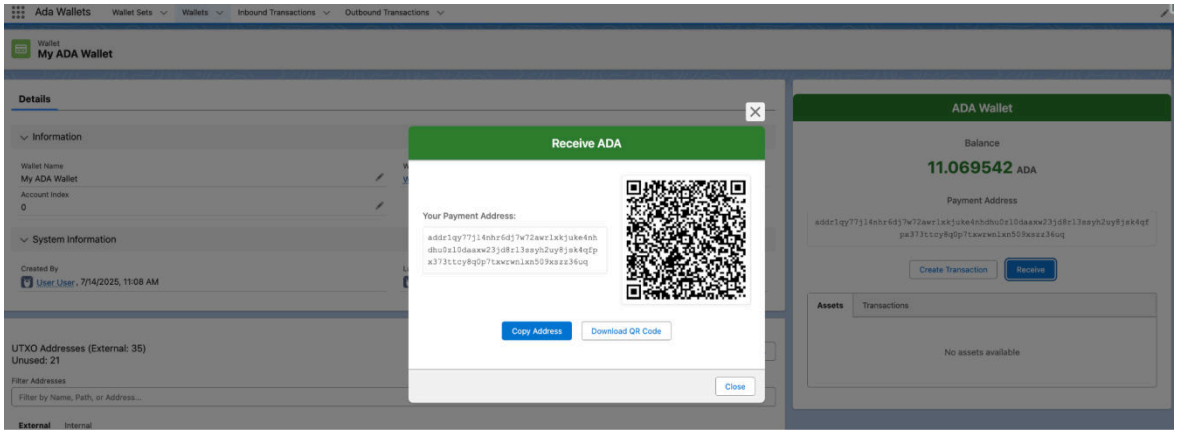
To receive ADA, follow these steps:

1. **Access Receive Button**: From your wallet dashboard, click the **"Receive"** button.
2. **View Modal**: A modal will open, displaying your payment address and QR code.

4.2 Share Your Address

To share your wallet address, follow these steps:

1. **Copy Address**: Click the **"Copy Address"** button to copy your payment address.
2. **Share with Sender**: Share the address with the sender.
3. **Download QR Code**: Alternatively, click the **"Download QR Code"** button to download the QR code.
4. **QR Code Usage**: The QR code can be scanned by other wallet applications.



4.3 Monitor Incoming Transactions

To monitor incoming transactions, follow these steps:

1. **Automatic Detection**: Incoming transactions are automatically detected.
2. **Refresh Page**: Refresh your wallet page to see new transactions.
3. **Check Transactions Tab**: View the **"Inbound"** section of the **"Transactions"** tab to see received funds.
4. **Transaction Details**: Details include block information and confirmation status.

Screenshot: The inbound transactions list, showing received funds with details. *(To be replaced by user)*

5. Creating Outbound Transaction

5.1 Open Create Transaction Modal

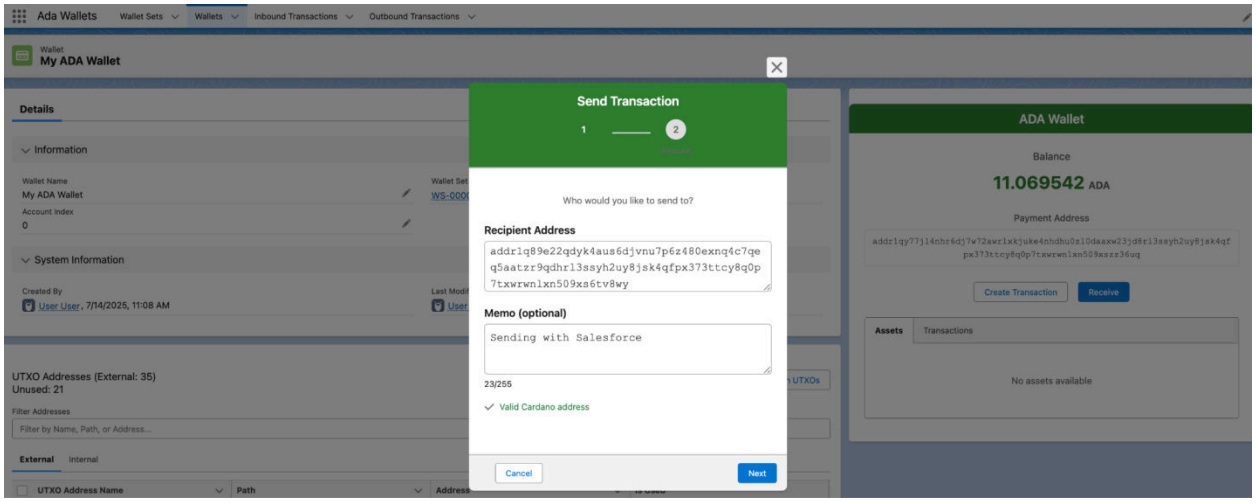
This does not directly send ADA but allows automations to directly send the Transaction after approved during the Approval Flow if enabled:

1. **Access Create Transaction**: From your wallet dashboard, click the **"Create Transaction"** button.
2. **View Modal**: A modal will open with a two-step process.

5.2 Step 1: Enter Recipient

To enter recipient details, follow these steps:

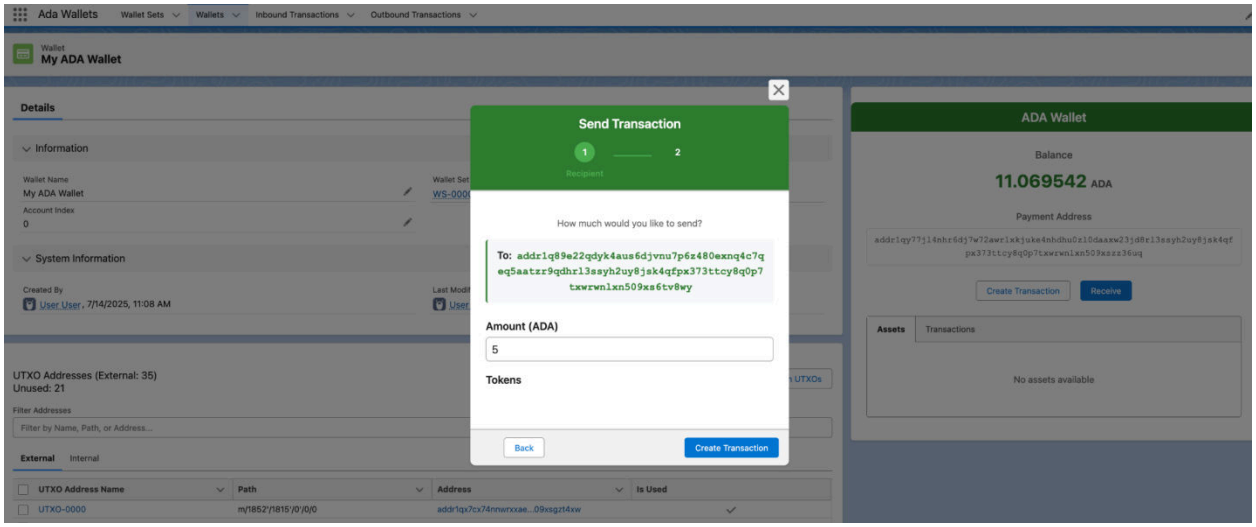
1. **Enter Address**: Input the recipient's Cardano address in the **"Recipient Address"** field.
2. **Address Validation**: The system will validate the address format.
3. **Add Memo**: Optionally, enter a memo in the **"Memo"** field (max 255 characters).
4. **Proceed**: Click **"Next"** to move to amount selection.



5.3 Step 2: Select Amounts

To select the amounts to send, follow these steps:

1. **Enter ADA Amount**: Input the ADA amount you want to send.
2. **Add Tokens**: Click **"Add Token"** to include additional assets.
3. **Select Token**: Choose a token from the dropdown and enter the amount.
4. **Send Maximum**: Use the **"Send Max"** buttons to send the maximum available amount.
5. **Remove Tokens**: Click the **"×"** button to remove tokens if needed.
6. **Create Transaction**: Click **"Create Transaction"** to build the transaction.

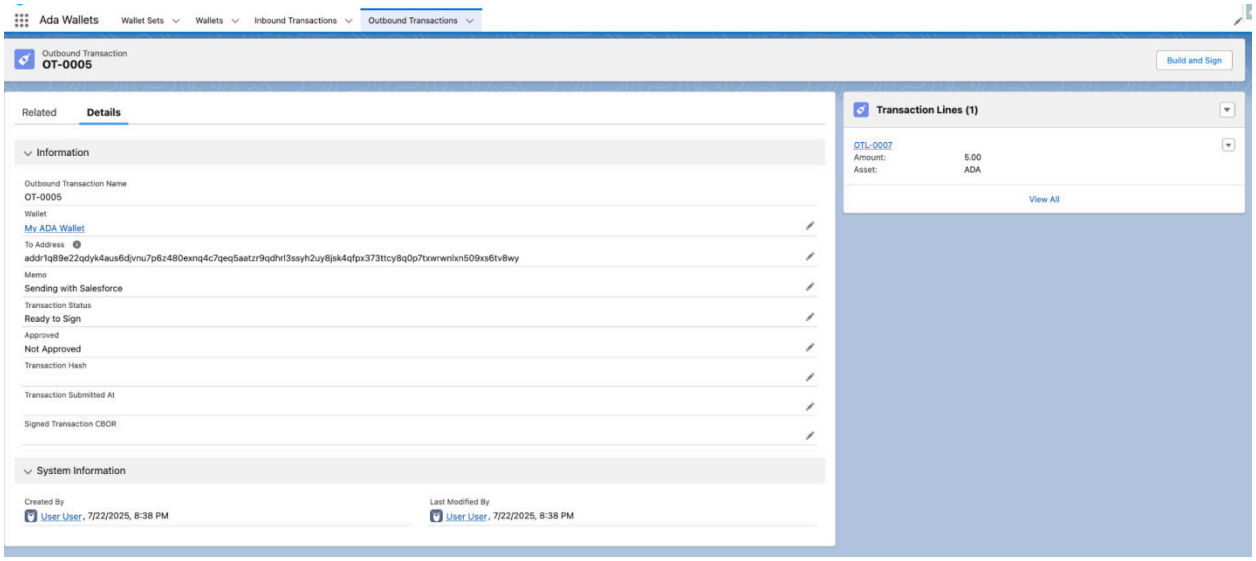


5.4 Create Transaction

To finalize the transaction, follow these steps:

1. **Transaction Creation**: The system will create an Outbound Transaction record.

2. **Transaction Lines**: Transaction lines will be created for each asset being sent.
3. **Initial Status**: The transaction will be in **"New"** status initially or **“Ready to Sign”** depending on approval status.

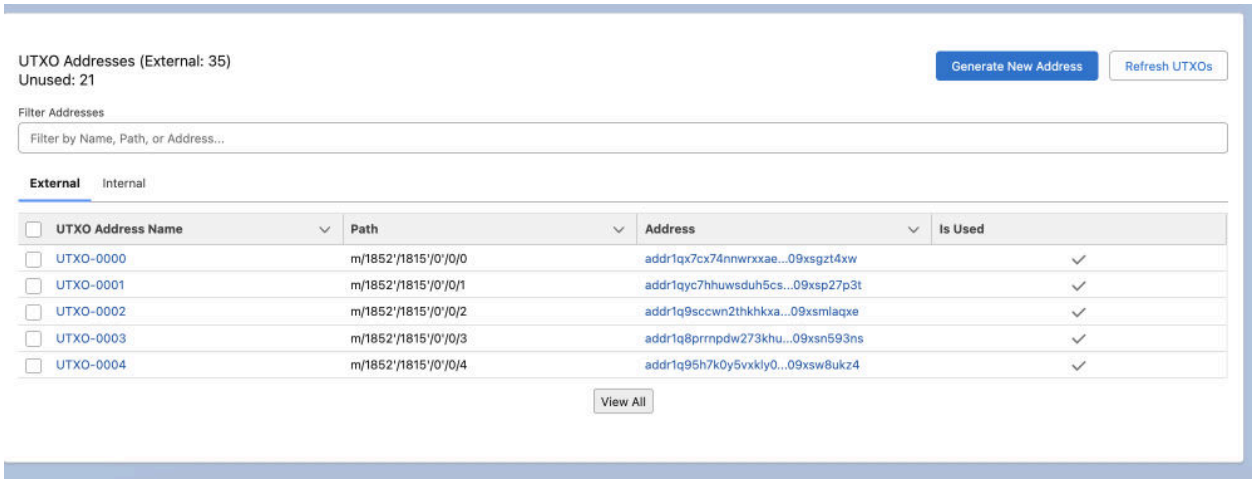


6. Managing UTXO Addresses

6.1 Open UTXO Addresses

To view UTXO addresses, follow these steps:

1. **Navigate to UTXO Addresses**: From your wallet record page, go to the **"UTXO Addresses"** related list.
2. **Access Component**: Click on the UTXO Addresses component.
3. **View Tabs**: You will see tabs for **"External"** (receiving) and **"Internal"** (change) addresses.



6.2 View Address Types

To understand address types, follow these steps:

1. **External Addresses**: These are used for receiving funds from others.
2. **Internal Addresses**: These are used for change from your own transactions.
3. **Address Details**: Each address shows its derivation path, full address, and usage status.
4. **Usage Status**: Addresses are marked as **"Used"** or **"Unused"** based on blockchain activity.

6.3 Derive New Receiving Address

To generate a new receiving address, follow these steps:

1. **Access External Tab**: Click on the **"External"** tab to view receiving addresses.
2. **Generate Address**: Click the **"Generate New Address"** button (requires seed phrase permission).
3. **System Actions**: The system will:
    - Derive the next available index for receiving addresses.
    - Generate private and public keys using BIP32 derivation.
    - Create a new Cardano address using the derived keys.
    - Save the address to the database.
    - Automatically sync assets and transactions for the new address.
4. **View New Address**: The new receiving address will appear in the list.
5. **Confirmation**: A success message will confirm the address was created.
6. **"ADA Wallet Payment"** permission set is required.

6.4 Derive New Change Address

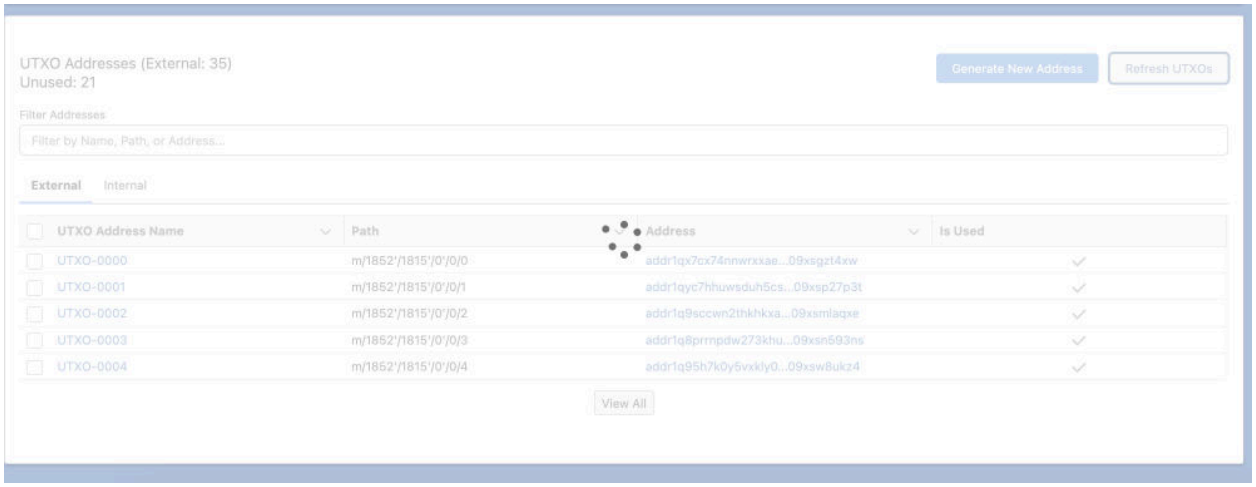
To generate a new change address, follow these steps:

1. **Access Internal Tab**: Click on the **"Internal"** tab to view change addresses.
2. **Generate Address**: Click the **"Generate New Address"** button (requires seed phrase permission).
3. **System Actions**: The system will:
    - Derive the next available index for change addresses.
    - Generate private and public keys using BIP32 derivation.
    - Create a new Cardano address using the derived keys.
    - Save the address to the database.
    - Automatically sync assets and transactions for the new address.
4. **View New Address**: The new change address will appear in the list.
5. **Confirmation**: A success message will confirm the address was created.
6. **"ADA Wallet Payment"** permission set is required.

6.5 Refresh UTXOs (Sync All Addresses)

To sync all addresses in the wallet, follow these steps:

1. **Initiate Sync**: Click the **"Refresh UTXOs"** button.
2. **System Actions**: The system will:
    - Check all receiving and change addresses for blockchain activity.
    - Update **"Used"** status based on actual UTXO presence.
    - Sync asset balances for all addresses.
    - Sync transaction history for all addresses.
    - Update Inbound Transaction records.
    - Update UTXO Asset records.
3. **Confirmation**: A success message will appear when the sync is complete.
4. **Updated Data**: Address counts and usage status will be updated.
5. **Balance Update**: Asset balances will reflect the current blockchain state.
6. This might take some time to sync all UTXO Addresses for the Wallet.

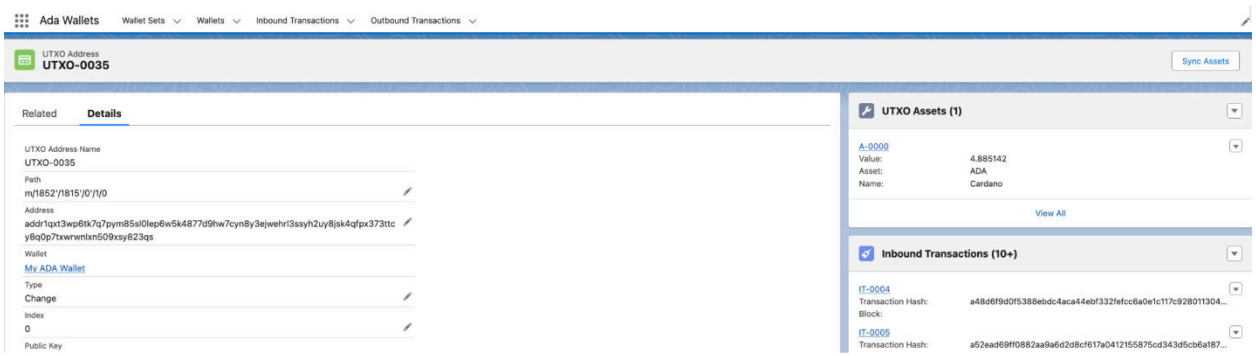


6.6 View Address Details

To view detailed address information, follow these steps:

1. **Access Address Record**: Click on any address name to view the full address record.
2. **View Details**: See complete address information, including:
    - Full Cardano address
    - Derivation path
    - Payment key hash
    - Usage status
    - Associated assets and transactions

3. **Sync Data**: Use the **"Get UTXO Address Assets"** quick action to sync individual address data.



6.7 Filter and Search Addresses

To filter and search addresses, follow these steps:

1. **Use Filter Field**: Search addresses by name, path, or address using the filter field.
2. **View in Batches**: View addresses in batches (default 5, expandable to view all).
3. **Toggle Display**: Switch between **"View All"** and **"View Less"** to manage display.
4. **Sorting**: Addresses are sorted by index within each type.

7. Transaction Approval Process

7.1 Understanding Transaction Status

To understand transaction statuses, note the following:

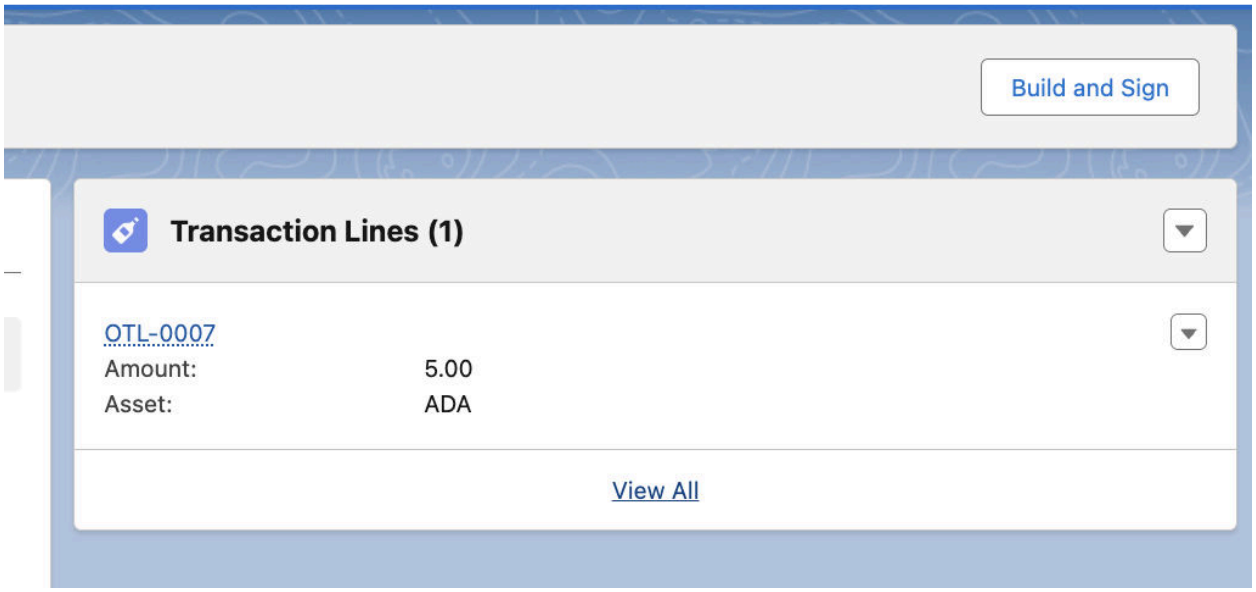
1. **New**: New transactions start in **"New"** status.
2. **Prepared**: When prepared, they move to **"Prepared"** status.
3. **Pending Approval**: If approvals are enabled, they move to **"Pending Approval"** status.
4. **Ready to Sign**: After approval, they move to **"Ready to Sign"** status.
5. **Ready to Send**: After signing, they move to **"Ready to Send"** status.
6. **Sent and Confirmed**: Finally, they move to **"Sent"** and **"Confirmed"** status.

7.2 Build and Sign Transaction

To build and sign a transaction, follow these steps:

1. **Access Quick Action**: From the Outbound transaction record page, click the **"Build and Sign"** quick action.
2. This button is only visible to users with the **"ADA Wallet Payment"** permission set.
3. **Load Component**: The system will load the Prepare and Sign Transaction component.
4. **Initiate Signing**: Click the **"Build and Sign Transaction"** button.

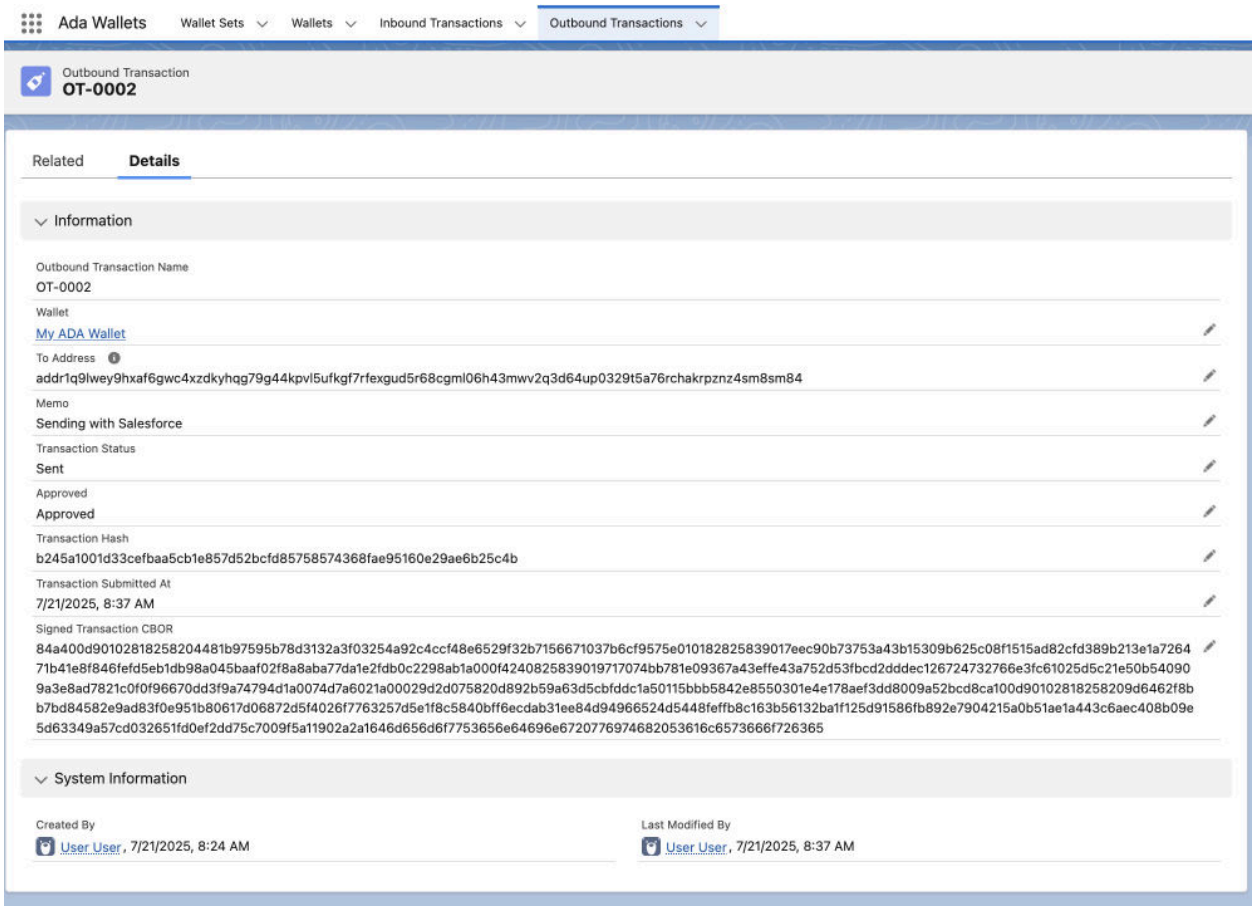
5. **System Actions**: The system will:
    - Load wallet data and UTXOs.
    - Fetch current network parameters.
    - Build the transaction with proper fees.
    - Sign the transaction with your private keys.
    - Update the transaction with signed CBOR data.
6. **Status Update**: The transaction status will change to **"Ready to Send"**.



7.3 Transaction Submission

To submit a transaction, follow these steps:

1. **Automatic Submission**: Once signed, the transaction automatically submits to the blockchain if the Transaction Approval is **“Approved”**.
2. **API Submission**: The system sends the signed transaction to the Blockfrost API.
3. **Status Update**: The transaction status changes to **"Sent"**.
4. **Track Transaction**: You will receive a transaction hash for tracking.
5. **Confirmation**: The transaction will eventually show as **"Confirmed"** on the blockchain.

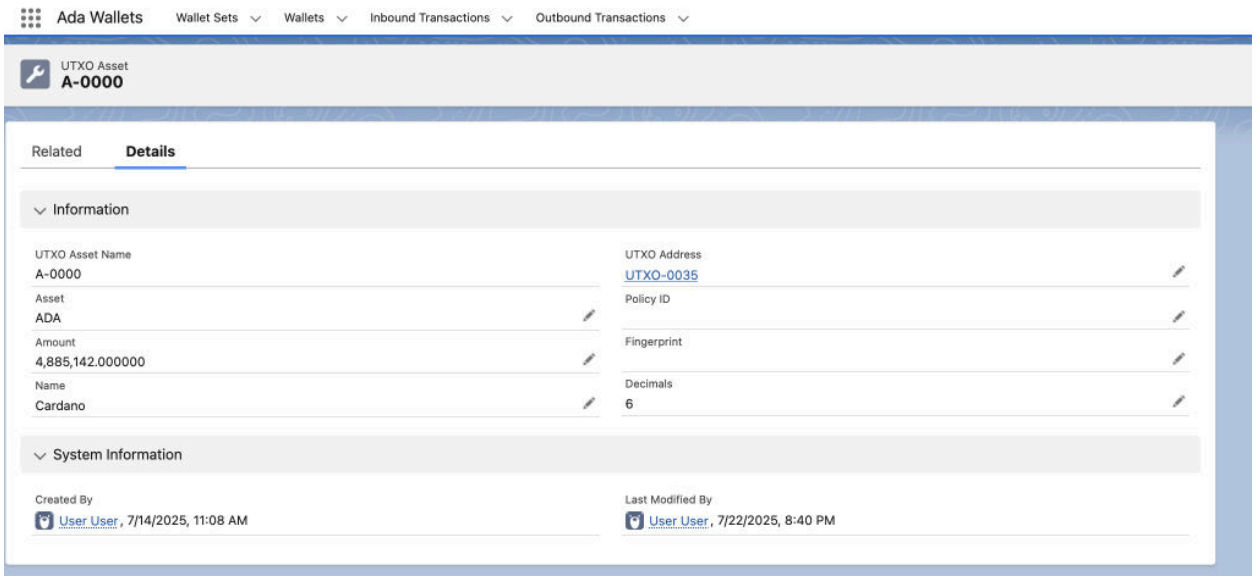


8. Managing Assets

8.1 View Asset Details

To view asset details, follow these steps:

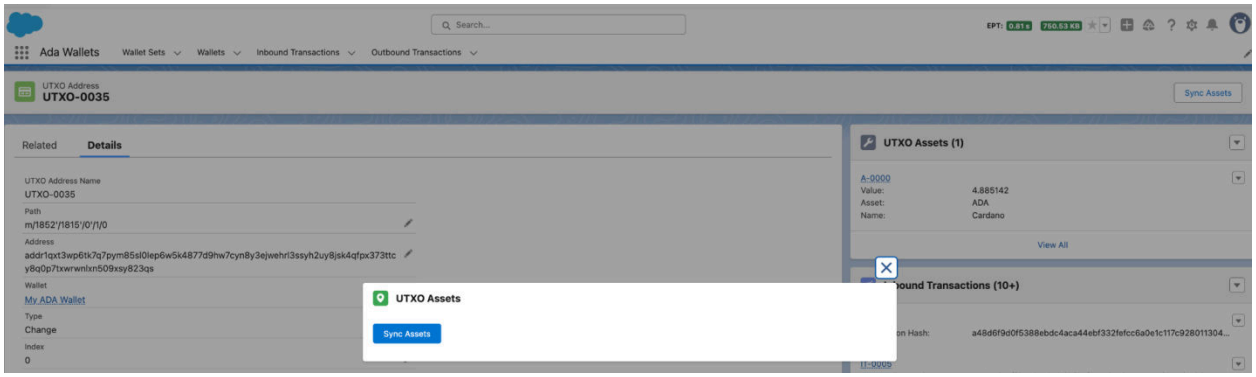
1. **Access Quick Action**: From any UTXO address record, click the **"Sync Assets"** quick action.
2. **Sync Data**: The system will sync assets and transactions for that address.
3. **View Details**: See detailed asset information, including amounts and metadata.
4. **Transaction History**: View the transaction history for the specific address.



8.2 Sync Asset Data

To sync asset data, follow these steps:

1. **Automatic Sync**: Asset data is automatically synced when addresses are created.
2. **Manual Sync**: Trigger manual sync from UTXO address records.
3. **Fetch Balances**: The system fetches current balances from the blockchain.
4. **Store Data**: Asset information is stored in UTXO Asset records.



9. Transaction History and Tracking

9.1 View Transaction Details

To view transaction details, follow these steps:

1. **Access Transaction**: Click on any transaction ID to view full details.
2. **View Information**: See transaction hash, status, amounts, and timestamps.

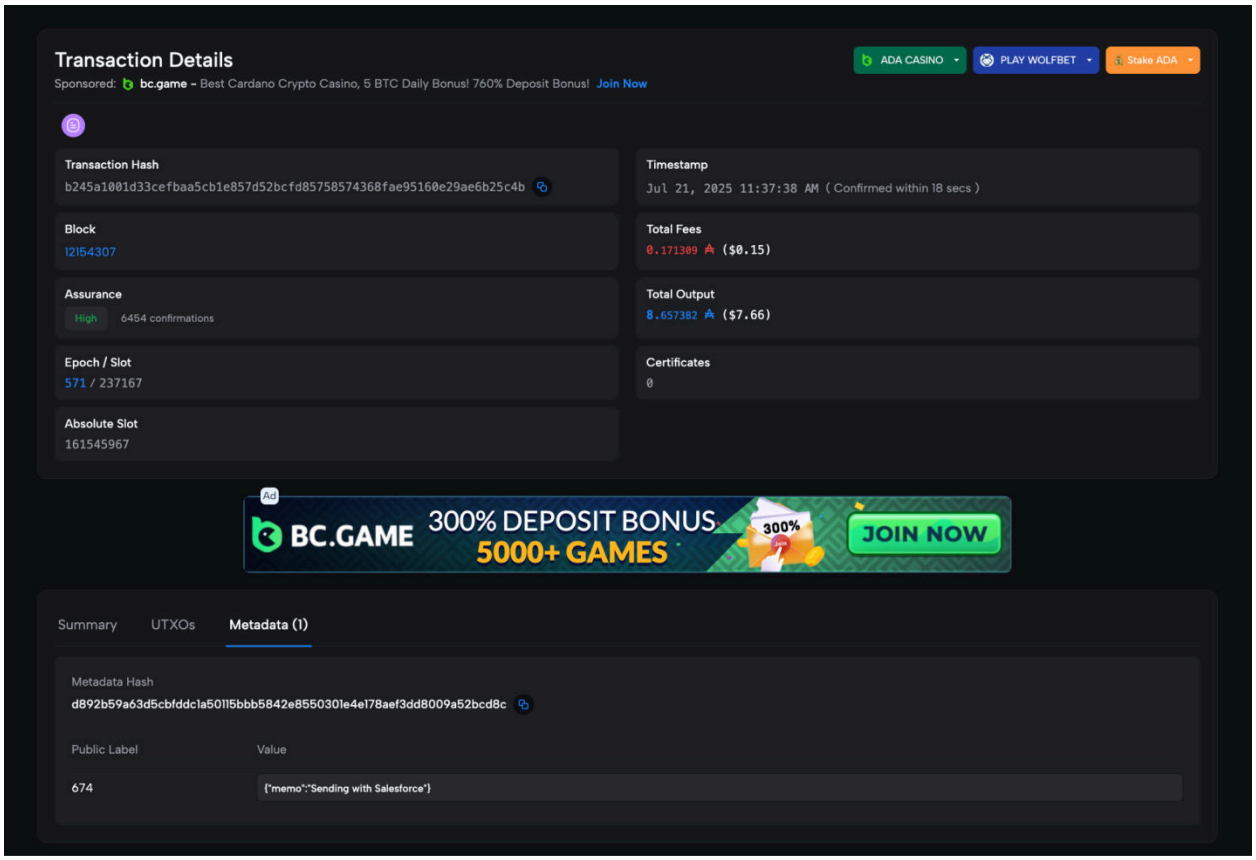
3. **Transaction Lines**: View transaction lines showing individual asset transfers.
4. **Blockchain Verification**: Access CardanoScan links for blockchain verification.

Screenshot: The transaction record, showing all details. *(To be replaced by user)*

9.2 Track Transaction Status

To track transaction status, follow these steps:

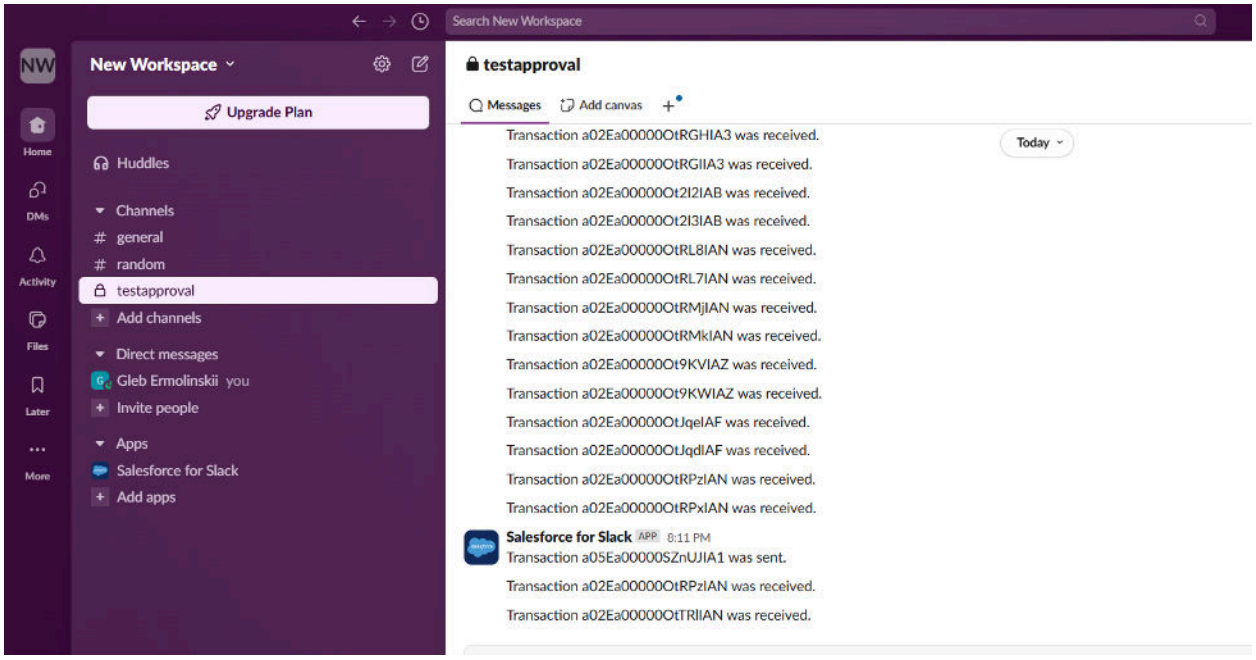
1. **Monitor Status**: Monitor transaction status changes in real-time.
2. **Check CardanoScan**: Use CardanoScan for blockchain confirmation.
3. **View Block Info**: See block information and confirmation count.
4. **Receive Notifications**: Get notifications when transactions are confirmed via Slack Workflows.



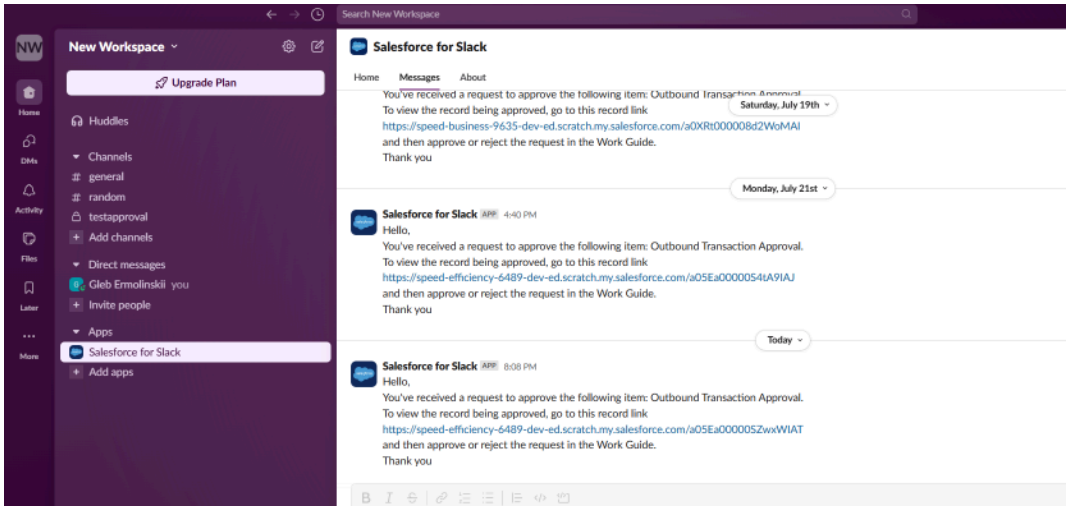
Templates for Salesforce Flows (Business Automation)

Slack on receiving a transaction. Slack on sending a transaction.

Each time a new inbound transaction is received or an outbound transaction is sent, you'll receive a notification in Slack in the channel specified in Slack Settings.

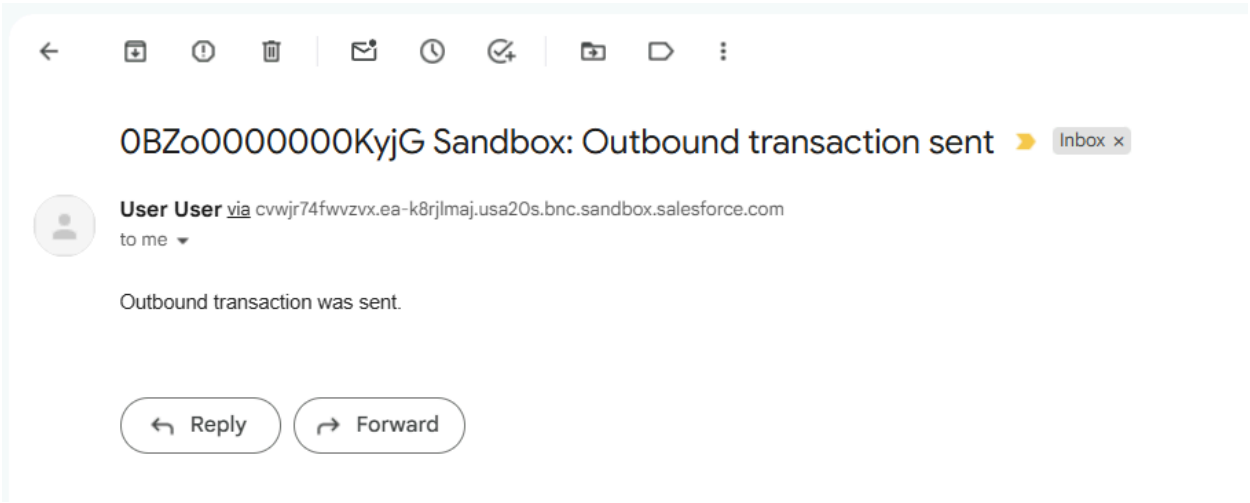


Request Approval via Slack for a transaction.



Whenever an approval is required, you'll receive a Slack message that includes a direct link to the record awaiting approval.

Email Accounting on sending a transaction.



Each time an outbound transaction is sent, you'll receive an email to the address specified in Email Settings.