Module 2:

Understanding The Building Blocks of a Flow

Objectives

☐ **Configure Process Automation Settings**

☐ **How To Create a Flow?**

☐ **How to Deploy the Flow?**

☐ **Working with More Flow Elements**

☐ **How To Debug the Flow?**

☐ **Testing the Flow**

☐ **Granting Users Access to Run Flows**

Using This Guide

A couple of standards/conventions have been followed in this guide. Here is what they mean

1. Text with White background, red border and a number, in a callout format

Actions that you need to follow to configure. Carry out these steps **in the order of its sequence number**.

Text with Yellow Background

General explanation/information to support actions mentioned on the slide. This will assist you in understanding what is being done and why

Text with Red Background

Important information. Take a closer look and follow as advised. You may not be able to complete the exercise successfully if you miss these instructions

Text with Green Background

Appears on the bottom bar of the page on the left hand side. Provides information on the Hardware and Software currently being used (if applicable)

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➡️ ☐ **Configure Process Automation Settings**

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Configure Process Automation Settings

1. Login to Salesforce and click on 'Setup'

Let's start with configuring the process automation settings to work with Flows

Configure Process Automation Settings

1. Search for 'Organization' in quick find box and click on 'Organization-Wide Addresses'

2. Click 'Add'

SETUP
Organization-Wide Addresses

Organization-Wide Email Addre...

An organization-wide email address associates a single e... in the profile can send email using this address. Users will share the same display name and email address.

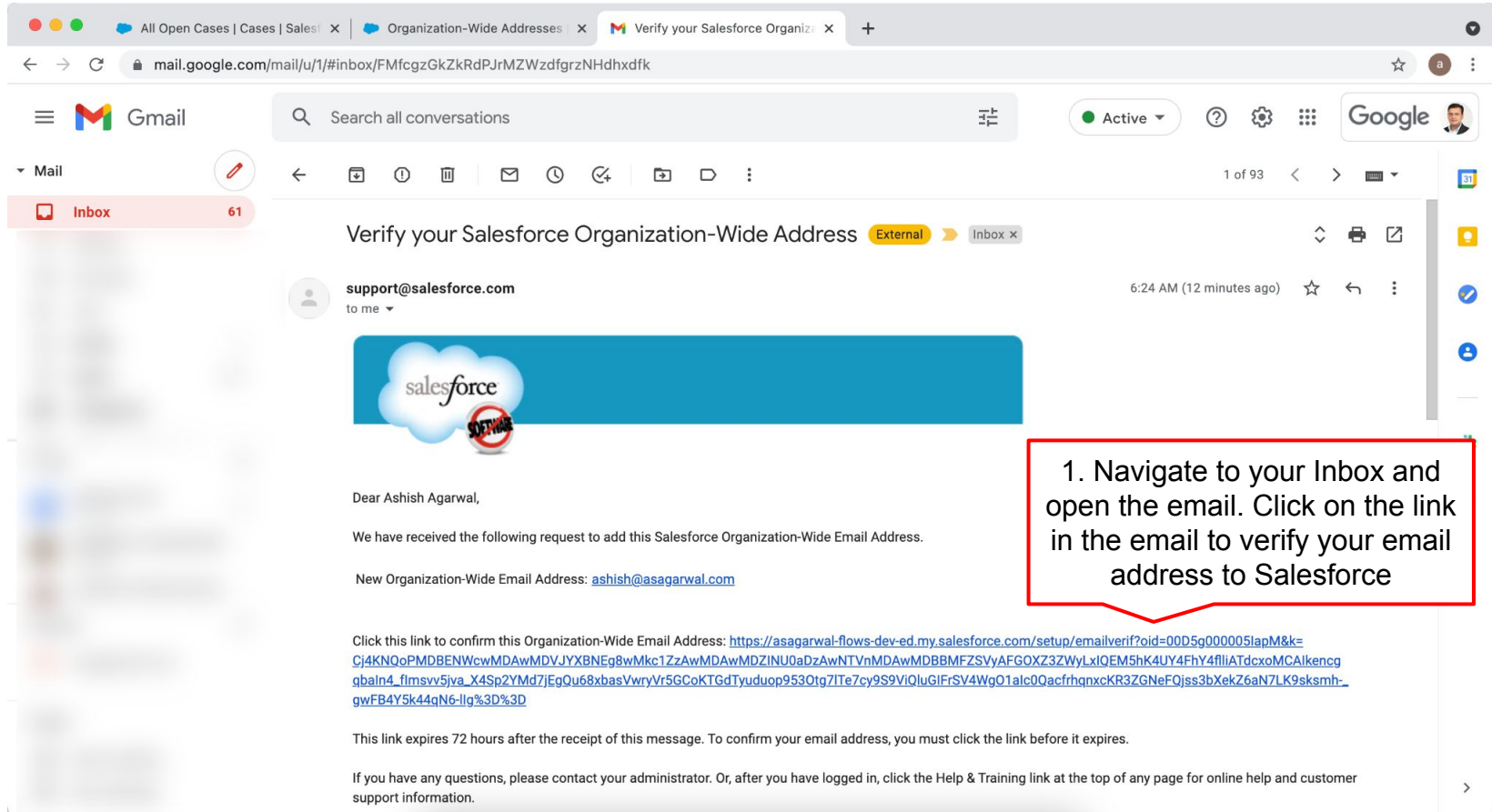**User Selectable Organization-Wide Email Addresses**   Add

No email addresses defined.

Special Purpose Organization-Wide Email Addresses   Add

WARNING: A VERIFIED email address is needed for: [Default No-Reply Address]

Q Organization

∨ Email

  Organization-Wide Addresses

Didn't find what you're looking for? Try using Global Search.

Let's start with configuring the process automation settings to work with Flows. First we will need to define an Organization-Wide Email Address that will be required in Process Automation Settings

Configure Process Automation Settings

1. Specify the Display Name, Email address and select the option to allow all profiles to use this From Address. Click 'Save'

Specify an Email Address that you can access as a verification link will be sent to that Email address

Configure Process Automation Settings

1. The Org wide email address is created, but it is still pending for verification.
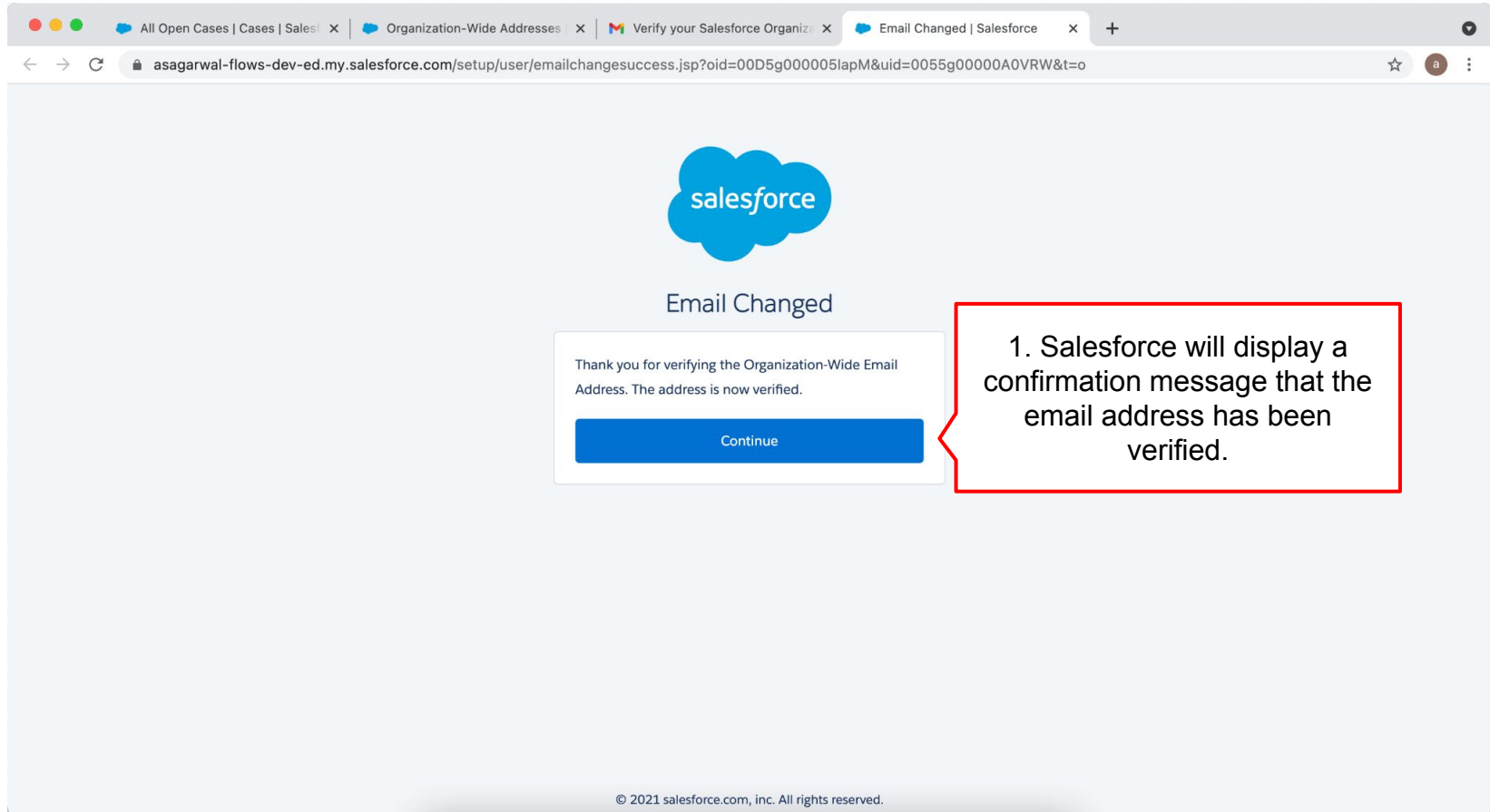
Configure Process Automation Settings

1. Navigate to your Inbox and open the email. Click on the link in the email to verify your email address to Salesforce

Configure Process Automation Settings

1. Salesforce will display a confirmation message that the email address has been verified.

Configure Process Automation Settings

1. Navigate back to Organization-Wide Addresses in setup and the status will now be changed to 'Verified'

Configure Process Automation Settings

1. Search for 'Process Automation' in quick find box and click on 'Process Automation Settings'

Process Automation

Process Automation
- Approval Processes
- Automation Home (Beta)
- Flows
- Next Best Action
- Paused And Failed Flow Interviews
- Post Templates
- Process Automation Settings
- Process Builder
- Workflow Actions
  - Email Alerts
  - Field Updates
  - Outbound Messages
  - Send Actions
  - Tasks
- Workflow Rules

Didn't find what you're looking for?

ce.com/lightning/setup/WorkflowSettings/home

Guest

Search Setup

SETUP
Process Automation Settings

Process Automation Settings

Help for this Page

Save   Cancel

The default workflow user is required for scheduled paths in record-triggered flows a ... is no longer active, the default workflow user is associated with the actions that are executed by the automation.

2. Set the values for Default Workflow User & Automated Process User Email Address. scroll down the page

Default Workflow User   Ashish Agarwal

By default, the Automated Process User has no email address, so event processes ... mails from the Automated Process User, specify an organization-wide email address for the system administrator profile.

Automated Process User Email Address   ashish@asagarwal.com

By default, the email approval sender is the approval submitter. To override the default sender, select an organization-wide email address.

Email Approval Sender   Approval Submitter

Enabling email approval response lets users reply to email approval requests by typing APPROVE or REJECT in the first line and adding comments in the second line.

Enable email approval response   ☐

⚠ By enabling the email approval response feature, you agree to allow Salesforce to process email approval responses, update approval requests for all active users in your organization, and update the approval object on behalf of your organization's users.

Let users pause flows when they need to wait for more information. Once you enable this setting, the Pause button appears on every screen that has Pause enabled.
Let users pause flows   ☑

Let users resume interviews that are shared with them, either directly or via the role hierarchy. When disabled, interviews can be resumed only by the user who paused the interview or a flow admin who has view access.
Let users resume shared flow interviews   ☑

Flows launched from a URL or from Setup use the Lightning runtime experience instead of the classic runtime experience. Only Lightning runtime supports two-column flow screens, custom screen components, and local actions.

Configure Process Automation Settings

Configure Process Automation Settings

Objectives

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☐ **Testing the Flow**

☐ **Granting Users Access to Run Flows**

Begin With the End in Mind

We will be creating a screen flow to let user create an account record from the Home page. We will also provide an option to the user to send an email on the creation of the record.

What are we trying to build?

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How To Create a Flow?

1. Search for 'Flows' in quick find and click on Flows

2. To create a new flow click on 'New Flow'

Ok, now that we know what we are trying to create, let's create our first Flow (Yay !)

How To Create a Flow?

How To Create a Flow?

How To Create a Flow?

1. The Screen that you enter is called Flow Builder. Let's familiarize ourselves with this

2. The toolbox gives you different tools to build your flow. This includes elements and manager

4. The bar on the top allows you to save, activate/deactivate, debug, run the flow

3. The canvas is the area where you drag different components from toolbar and build your flow

How To Create a Flow?

2. Clicking on back arrow will take you back to Setup in Salesforce

1. Click '?' icon on top right to access help

How To Create a Flow?

2. 'Start' element is the starting point of the flow

1. The 'Elements' tab is divided in three main areas - Interaction, Logic & Data. Each element represents an action that the flow can execute. E.g. displaying a screen & collecting input, assigning values, manipulating data in Salesforce etc.

How To Create a Flow?

1. Under 'Manager' tab you can define a resource. Resources contain a value that you can reference throughout the flow. There are different types of resources that you can create in a Flow

How To Create a Flow?

1. Use Screen Element to display a screen (UI) to the user. This can be used to get input from the user and/or to display messages. To create a screen element, drag and drop it on the canvas

How To Create a Flow?

1. In a Screen Flow, you can choose different input components

2. The Flow label here will be replaced with the name of the Flow once you save it

3. Specify the label for your Screen. The label is displayed in the Flow Builder

4. The API Name populates automatically from the label. Spaces are replaced with underscore

API Name - this value can only contain underscores and alphanumeric characters and can be up to 80 characters

How To Create a Flow?

1. As a best practice, use 'Description' field throughout in the Flow Builder to document your work. This can include things like the rationale, logic, processing, integration and will make it easier for you to understand the logic and make changes later on.

2. Check/Uncheck Show Header to control if you want to display the header/footer on the screen

Best Practice Tip: Use 'Description' field throughout in the Flow Builder to document your work

How To Create a Flow?

1. With Control Navigation, you can control which buttons should be displayed on the screen

2. We'll take a look at Pause Confirmation Message a little later

How To Create a Flow?

1. Enter help text to provide on screen contextual help to your users. Help text will be displayed when the user hovers on the 'i' icon on the screen

How To Create a Flow?

1. Type Display in the 'Search Components' box and drag and drop the 'Display Text' onto Canvas

How To Create a Flow?

How To Create a Flow?

1. The Screen element displays on the Canvas. Note the name displays on the Canvas is the Label that you have specified while creating the screen

2. To connect the elements click on the small circle below the element, drag the mouse and release it on the element you want to connect it to

How To Create a Flow?

1. When connected, the line with an arrow will appear between the elements to show the connection. Drag the element with mouse to straighten the line or to change the position of the element, if desired

2. As a best practice, keep saving your work frequently to avoid any loss of work

Best Practice Tip: Save your work frequently to avoid any loss of work

How To Create a Flow?

1. Enter the Flow label, Flow API Name & Description

2. Click 'Show Advanced'. Let's explore what's in there

Best Practice Tip: Come up with a naming convention to name your Flows. For example, your naming convention can be <Object> - <Flow Type> - <Purpose>

How To Create a Flow?

1. Select how do you want to run the flow. If you choose system context with sharing, the flow respects OWD and all sharing rules. But it does not respect object permissions, field-level access or other permissions of the running user. If you choose system context without sharing, the flow can access all data and do anything

Best Practice Tip: Unless there is a compelling reason to run the flow in System Context, select the first option - 'User or System Context'

How To Create a Flow?

1. You can change the flow from one type to another in this option. But there are some compatibility issues that you need to be aware of. We'll discuss that later in this course.

How To Create a Flow?

1. Specify the API version of the flow. This determines which version run-time behaviour the flow adopts. This version, once set will not change automatically with new releases of Salesforce. You will need to change it manually if required

2. The label for the flow's interviews. An interview is a running instance of a flow. This label appears in the different areas in Salesforce

3. Ok, let's save the flow now

How To Create a Flow?

3. To appreciate your handiwork, click on 'Run' to see how it looks like

1. Once saved, the flow name will appear in the Flow builder along with the Flow version

2. Notice that the flow is in 'Inactive' state. To run the flow you will need to activate it. But we will do that a little later.

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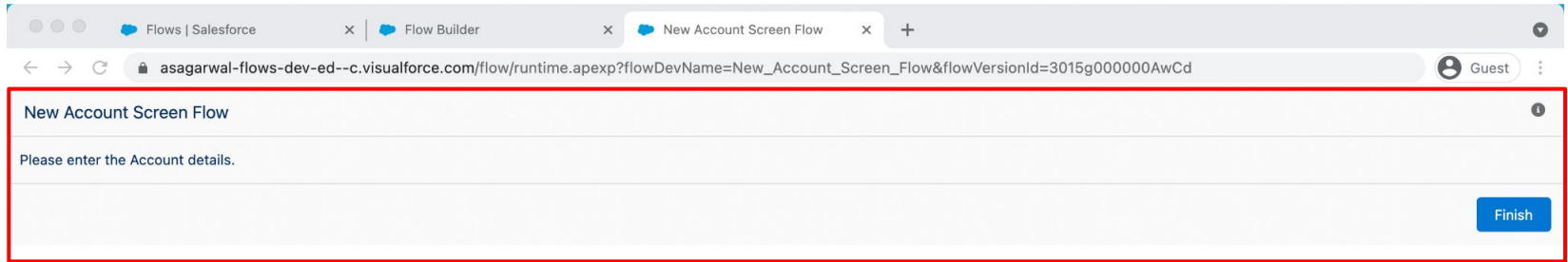
How To Create a Flow?

1. The flow will run in a new tab and here is how it looks. It looks a little plain as of now, but don't worry. We are going to enhance it subsequently :-).

You can close this tab now

How To Create a Flow?

How To Create a Flow?

1. Type Text in the Search Components box, drag and drop the Text Component on Canvas

2. Enter the label and API Name for the Text Component

3. Check 'Require' field to make this field mandatory on the form

How To Create a Flow?

1. Next, type URL in the Search Components box, drag and drop the URL Component on Canvas

2. Enter the label and API Name for the Text Component

3. Click Done

How To Create a Flow?

1. Click and drag the 'Create Records' component on canvas

Next, we will create a new record in Account object with the information provided

How To Create a Flow?

How To Create a Flow?

1. Specify the values with which the record should be created.

2. The Account Name & Website will be set to the values entered by the user in the screen element created before

3. Click 'Done'

How To Create a Flow?

1. Like before, to connect the elements click on the small circle below the element, drag the mouse and release it on the element you want to connect it to

How To Create a Flow?

3. Let's test this out. Click on Run

2. Click on Save

1. When connected, the line with an arrow will appear between the elements to show the connection. Drag the element with mouse to straighten the line or to change the position of the element, if desired

How To Create a Flow?

1. Enter the Account details

2. Click Next

Caution: Running the Flow from Flow Builder will actually perform DML operations in Salesforce

How To Create a Flow?

1. Flow runs and brings user back to the first screen. Okay, this is a bit confusing. We need to fix this. But first, let's check if the record was created or not.

How To Create a Flow?

1. If you navigate to the application, go to 'Accounts' tab -> 'All Accounts' list view, you will see the newly created Account. Cool, isn't it? Let's go back to Flow definition to enhance it further

How To Create a Flow?

How To Create a Flow?

1. Enter the screen label, API Name & Description

How To Create a Flow?

1. Add 'Display Text' component to canvas

2. Specify the API Name and the message. Note the text within double quotes. We will replace these with the account name and website entered by the user.

How To Create a Flow?

1. To replace <name> with account name, highlight the text and click on 'Insert a resource …' box

How To Create a Flow?

1. Select 'AccountName'

How To Create a Flow?

1. Notice that the Account name is populated as {!AccountName}. This is also called as 'Merge Field Syntax'. This means that the value will be replaced with the actual value at the run time

How To Create a Flow?

1. We will similarly specify the merge field syntax for Account URL also. Click on Done

How To Create a Flow?

3. Click 'Run' to test your Flow

2. Click 'Save'

1. Connect the confirmation screen with Create Records

How To Create a Flow?

How To Create a Flow?

1. And voila, the confirmation screen is now being displayed telling user that the account has successfully been created. This is a better user experience than before

2. But the previous button here does not make much sense. Let's take this out. If you click 'Finish', it will always take you back to the first screen of the flow.You can close this tab now

How To Create a Flow?

1. To remove the previous button, double click on 'Confirmation Screen' element

How To Create a Flow?

1. In the right sidebar, under 'Control Navigation', uncheck 'Previous' & 'Pause' and click on Done

How To Create a Flow?

2. Click on 'Back Arrow' to navigate back to Salesforce Setup

1. Click on 'Save' and click on 'Activate'. Now let's deploy this flow to the users

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☐ **How To Debug the Flow?**
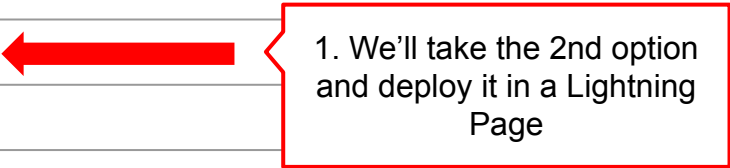
☐ **Testing the Flow**

☐ **Granting Users Access to Run Flows**

How to Deploy the Screen Flow?

#	Deployment Option	Type
1	Flow actions	Declarative
2	Lightning pages	Declarative
3	Experience Builder Pages	Declarative
4	Custom buttons or custom links	Declarative
5	Web tabs	Declarative
6	Direct flow URLs	Declarative
7	Embedded Service Deployments	Declarative
8	Custom Aura Components	Programmatic
9	Custom Lightning Web Components	Programmatic
10	Visualforce Pages	Programmatic
11	Lighting Out	Programmatic

1. We'll take the 2nd option and deploy it in a Lightning Page

How to Deploy the Flow?

How to Deploy the Flow?

1. Click on Gear icon and 'Edit Page'

How to Deploy the Flow?

1. Type 'Flow' in the search box and drag and drop the Flow component on top right hand corner of the page

How to Deploy the Flow?

1. Select the 'Flow' component and select the flow that you just created

How to Deploy the Flow?

How to Deploy the Flow?

How to Deploy the Flow?

How to Deploy the Flow?

1. Click 'Save'

How to Deploy the Flow?

How to Deploy the Flow?

How to Deploy the Flow?

How to Deploy the Flow?

1. To verify that the record has been created, navigate to Accounts tab

How to Deploy the Flow?

1. And you will find all the account records, created through Flows. How's that?

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How To Debug the Flow?

Testing the Flow

Granting Users Access to Run Flows

Working with More Flow Elements

1. Navigate to Setup and in Quick Find box, type Flows. Then click 'Flows'

2. Click on Flow name to open the Flow

Now, let's go back to the Flow and add some bells & whistles. We will add the feature to ask user if she/he wants to send an email on Account creation and will send the email based on user's choice

Working with More Flow Elements

Working with More Flow Elements

Working with More Flow Elements

Working with More Flow Elements

Working with More Flow Elements

Working with More Flow Elements

Working with More Flow Elements

1. Set the condition to show the 'Email' field only when the user has toggled the 'SendEmail' option to 'Yes'

2. Click 'Done'

{!$GlobalConstant.True} & {!$GlobalConstant.False} are System Provided Global Constants that you can use to check or assign values

Working with More Flow Elements

{!$GlobalConstant.True} & {!$GlobalConstant.False} are System Provided Global Constants that you can use to check or assign values

1. Click 'Done'

Working with More Flow Elements

1. Click on 'Decision' Element & drag it on the Canvas

Next, we'll add a decision element to Flows to check if the user has selected the option to send email and has specified an email address

Working with More Flow Elements

1. Enter a label for the decision element, API Name and Description

2. You can evaluate multiple conditions in making a decision.

3. Specify the label & API name for the 1st outcome

5. Click on 'Default Outcome'

4. Specify the condition. Here this outcome will be executed if the user has toggled the 'Send Email' option to Yes and has specified an email address

Working with More Flow Elements

Working with More Flow Elements

Working with More Flow Elements

1. Now, let's create the body of the email that we want to send out. Click on 'Manager' tab -> 'New Resource'

Now let's learn how to create resource explicitly

Working with More Flow Elements

1. There are different resource types available in Flow. Let's start with 'Text Template' resource type

Working with More Flow Elements

Working with More Flow Elements

Working with More Flow Elements

1. To send the email, drag and drop the 'Action' element on the Canvas

Working with More Flow Elements

1. There are many different types of actions available in Flows. You can find these actions by Category or by type

Working with More Flow Elements

Working with More Flow Elements

1. Now let's configure the send email action. Enter the label, API Name and description. The Label displays in Canvas on Flow Builder and so always give it a meaningful name so that you will know what this action is doing just by looking at the label

2. For Body, enter the name of the resource that we created in previous step

3. For Subject, just enter the text as shown here. Scroll down the window

Working with More Flow Elements

1. Toggle the Email Addresses field to 'Include' and enter the merge field from the form where user has entered the email address. The email will be sent to this email address

2. Click Done

Working with More Flow Elements

1. Now, let's connect the elements. Click on the small circle below the element, drag the mouse and release it on the Action element

Working with More Flow Elements

1. Because we are connecting it with a decision element, Salesforce will prompt to select the Outcome for which you want to execute the action. Here we want to execute the 'Send Email Notification' action when the user has toggled to send email and has provided an email address. Select the 'Yes' outcome and click 'Done'

Working with More Flow Elements

1. Flow Builder will show you the Outcome on the connector. Here it shows that when the outcome of decision 'Send Email' is 'Yes' action 'Send Email Notification' will be executed. Pretty intuitive, right?

Working with More Flow Elements

1. Now, since the Flow is currently active, you can't just save changes on the current version. You need to select 'Save As'. This is another cool 'version control' feature in Flows. Note the current version of the Flow, which is V1 and then click 'Save As'

Working with More Flow Elements

1. You can save the Flow as a New Version of the existing Flow or an entirely new Flow altogether. For now, we will save it as a new version.

2. If you want to document the changes, that has been done in this version, you can add that under description

3. Click 'Save'

Working with More Flow Elements

1. Since you saved the Flow as a new version, notice that the version has now changed from V1 to V2.

2. But this version is still Inactive. This means that when the users submit the form on the Home Page, Flow version V1 will be triggered and not this new version V2.

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Testing the Flow

Granting Users Access to Run Flows

How To Debug the Flow?

1. Before we activate this version, let's test it out. Previously we used the 'Run' option to test the Flow. This time, we are going to try out the 'Debug' option and observe the difference. Click on 'Debug'

How To Debug the Flow?

How To Debug the Flow?

1. Unlike 'Run' option, 'Debug' will display the processing details when running the Flow. This is quite powerful and will tell you exactly how your Flow is processing the information. Hold your breath as we dive into it. :-)

How To Debug the Flow?

1. Enter the Account Name and Website and click 'Next'

How To Debug the Flow?

1. Under 'Debug', notice how Flow is processing the Screen Element. It shows the different components defined in Screen Element and what values were assigned to those components

2. And then Debug shows you the processing of 2nd Element, which is 'Create Record'. It shows that account record was created and also shows the 'Account ID'.

How To Debug the Flow?

1. If you navigate to the first browser tab and go to 'Accounts', you will notice that the account has already been created.

How To Debug the Flow?

1. Let's navigate back to Debug tab. Note that 'Send Email Notification' is set to 'No' and we don't see the Email field to enter the email address. Toggle this to 'Yes'

How To Debug the Flow?

1. And as we toggle the 'Send Email Notification' switch to 'Yes', the Email field becomes visible. Pretty cool. Enter the email address and click 'Next'

How To Debug the Flow?

1. Let's pay attention to the Debug details. Now you can see the processing details of 3rd Element, which is confirmation screen that contains the Toggle switch and email field. Note that Debug shows you all the details here. Scroll down the window.
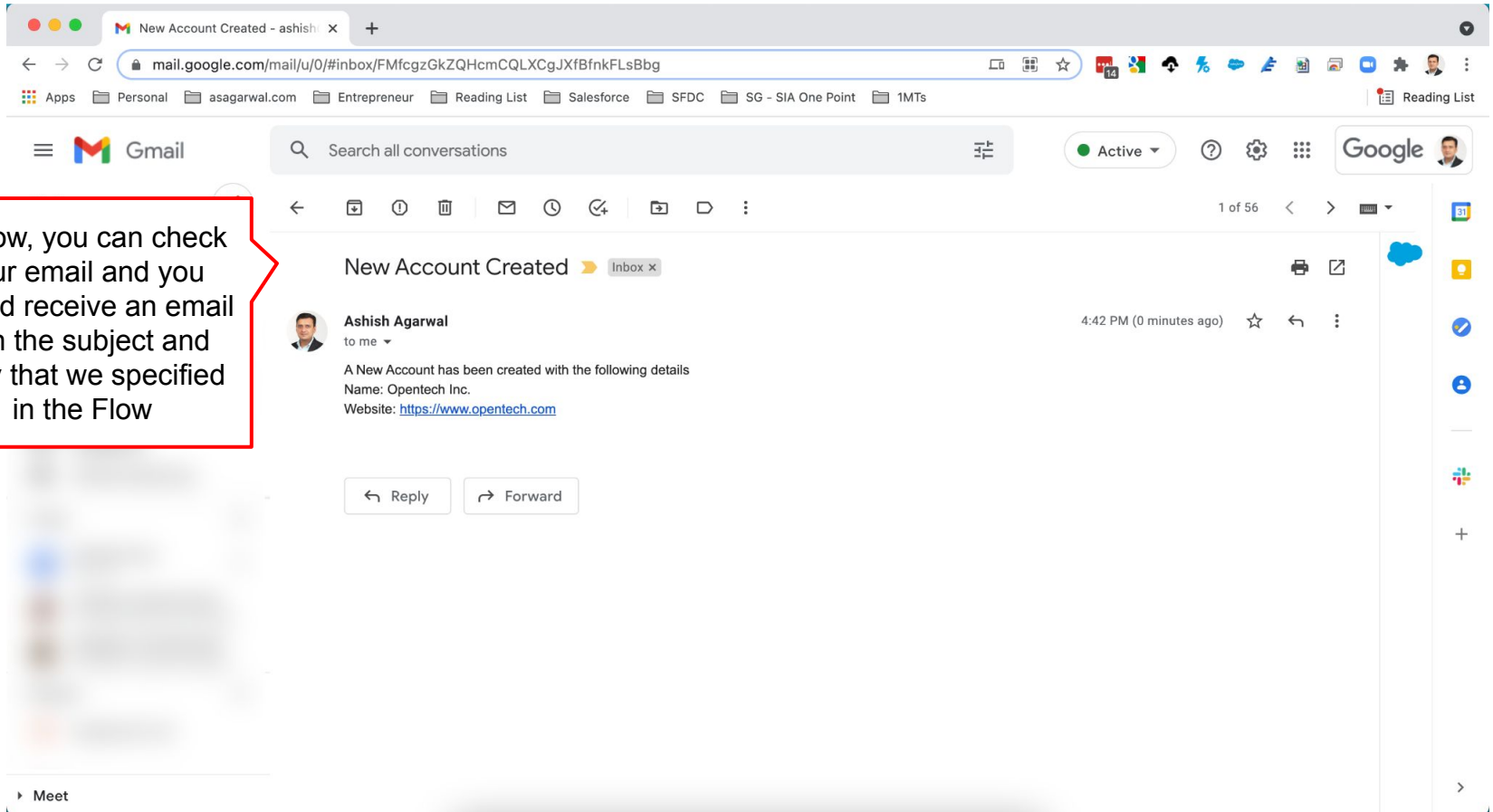
How To Debug the Flow?

1. The 4th Element in the Flow is a Decision element. Note that Debug section is showing that the outcome executed was 'Yes' and also the values of the conditions in the outcome. Very intuitive.

2. And since the decision outcome was 'Yes', the 5th element 'Send Email Notification' was executed. Here you can see the Email Body, Email Subject and the Email Address to which this notification was sent.

How To Debug the Flow?

1. Now, you can check your email and you should receive an email with the subject and body that we specified in the Flow

How To Debug the Flow?

1. Since everything worked fine in debug, we can now activate this flow. Activating V2 will automatically deactivate version V1 and version V2 will become live for all users. Click on 'Activate'

How To Debug the Flow?

2. To take a look at all the version, click on back arrow

1. Flow Builder shows that Version 2 is now Active. Let's check this out

How To Debug the Flow?

1. Here you can see all the version of the Flows and which version is currently active.

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Granting Users Access to Run Flows

Testing the Flow

1. Navigate to Home tab, if you are not already there.

2. Enter the Account Name & Website. Click Next

Testing the Flow

1. Navigate to Home tab, if you are not already there.

New Account Screen Flow

Account "Zen Corporation" with URL "https://www.zencorporation.com" has been successfully created.

Send Email Notification?   Yes

Email

ashish@asagarwal.com

2. Toggle 'Send Email Notification' to 'Yes', enter the email address and click 'Next'

Next

Testing the Flow

2. To verify that the account was created, click on 'Accounts' tab

1. Flow will bring you back to the 1st Screen.

Testing the Flow

Testing the Flow

1. And you can also see the email notification

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➡ ☐ **Granting Users Access to Run Flows**

Granting Users Access to Run Flows

1. In your Salesforce Org, create another User. You can use your own email address but ensure that the username you are providing is unique

2. Select the user license as 'Salesforce' and profile as 'Standard User' and save the record

3. Set yourself as Manager for this user. We will be need this in subsequent modules

You need to grant users access to run Flows. Let's see how to do that

Granting Users Access to Run Flows

1. To allow admins to login as any user, type 'Login Access' in the search box and click 'Login Access Policies'
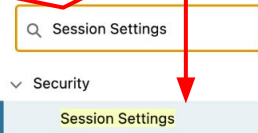
2. Check the box for 'Administrators Can Login as Any User' and click 'Save'
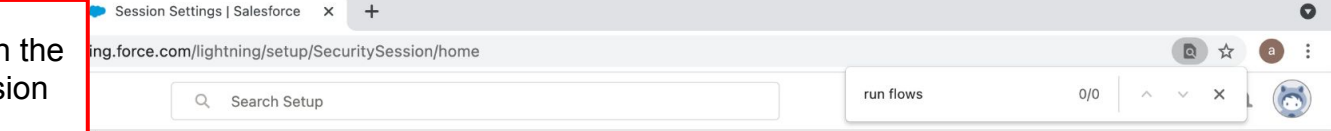
Enable the setting to allow you to login as any user.

Granting Users Access to Run Flows

1. Type 'Session Settings' in the search box and click 'Session Settings'

2. Uncheck the box for 'Force relogin after Login-As-User' and click 'Save'

Also disable the setting to 'Force relogin after Login-As-User' for ease of testing

Granting Users Access to Run Flows

1. Type 'Users' in the search box and click 'Users'

2. Click on 'Login' for the user that you just created

Granting Users Access to Run Flows

Granting Users Access to Run Flows

1. Let's fix this. Log out as the the logged in User

Granting Users Access to Run Flows

1. Click on 'Edit' for the user

Granting Users Access to Run Flows

1. Check the box for 'Flow User' and 'Save'

There are two ways to grant users access to run Flows. One is to check the box for 'Flow User' on user's record

Granting Users Access to Run Flows

1. Navigate to user's Profile, Type 'Run Flows' in the search box and click 'Run Flows' under System Permission

Another way to grant users access to run Flows is to grant the permission at Profile Level or do it through Permission Sets.

However, on the Profile level, you can only change this permission for custom profiles. If using a standard profile, you will need to use 'Permission Set' as Salesforce does not allow you to change some of the settings for Standard Profiles

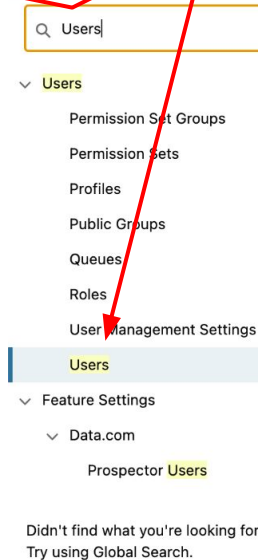# Granting Users Access to Run Flows

1. Click on 'Edit', check the box to 'Run Flows' and click Save. But we will not do this now as we have already granted the user access from user's record

Granting Users Access to Run Flows

1. Let's log back in as the user. Type 'Users' in the search box and click 'Users'

2. Click on 'Login' for the user that you just created

Granting Users Access to Run Flows

1. And voila, user can now see and run the Flow

2. Finally logout as the user

Let's Recap - Important Flow Terminologies

Type	Suggested Resource
Salesforce Flow	Salesforce product that encompasses building, managing, and running flows and processes.
Flow	The part of Salesforce Flow that automates a business process by collecting data and doing something in your Salesforce org or an external system.
Flow Builder	A point-and-click tool for building flows.
Flow Version	A version is the saved copy of a flow.
Flow Interview	An interview is a running instance of a flow.
Flow Elements	An element is a step in the flow that instructs the flow on what to do. Elements can further be categorized into three different buckets - screens, logic, and actions.
Flow Resource	Resources are placeholders (think of variables) that you reference throughout your flow.

Let's Recap

✓ **Configure Process Automation Settings**

✓ **How To Create a Flow?**

✓ **How to Deploy the Flow?**

✓ **Working with More Flow Elements**

✓ **How To Debug the Flow?**

✓ **Testing the Flow**

✓ **Granting Users Access to Run Flows**

It's Your Turn Now

➢ **Configure Process Automation Settings**

➢ **Create a Screen-Flow to create an account record and give the option to the user to send an email**

➢ **Embed the Screen-Flow on the Home Page**

➢ **Debug the Flow**

➢ **Test the Flow by creating an account record and sending email**

➢ **Create a user in your Salesforce Org, grant the user permission to run Flows and test the flow as that user**

Questions