



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

Text with Yellow Background

Text with Red Background

Text with Green Background

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

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

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

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)

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**

Configure Process Automation Settings

The screenshot shows the Salesforce Sales Console interface. The top navigation bar includes the Salesforce logo, a search bar, and a 'Setup' button. A red box highlights the 'Setup' button with the text '1. Login to Salesforce and click on 'Setup''. The 'Setup' dropdown menu is open, showing options: 'Setup for current app', 'Service Setup', 'Developer Console', and 'Edit Page'. The main content area displays a 'Quarterly Performance' chart with a line graph showing 'Closed' and 'Goal' metrics. Below the chart are sections for 'Today's Events' and 'Today's Tasks'. A yellow box at the bottom right contains the text 'Let's start with configuring the process automation settings to work with Flows'.

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'

Q Organization

▼ Email

Organization-Wide Addresses

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

Organization-Wide Email Address

An organization-wide email address associates a single email address with a user profile. Any user 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]

2. Click 'Add'

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

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'Organization' entered and a list of categories including 'Email' and 'Organization-Wide Addresses'. The main content area is titled 'Edit Organization-Wide Email Addresses' and includes a description: 'An organization-wide email address associates a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address.' Below this is a form with fields for 'Display Name' (Ashish Agarwal) and 'Email Address' (ashish@asagarwal.com). There are two radio buttons: 'Allow All Profiles to Use this From Address' (selected) and 'Allow Only Selected Profiles to Use the From Address'. A list of profiles is shown below, including 'Minimum Access - Salesforce', 'External Apps Login User', 'System Administrator', 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Standard Platform User', 'Customer Community Login User', 'Cross Org Data Proxy User', 'Authenticated Website', and 'Work.com Only User'. A red box highlights the first instruction: '1. Specify the Display Name, Email address and select the option to allow all profiles to use this From Address. Click 'Save''. A yellow box at the bottom right contains the text: 'Specify an Email Address that you can access as a verification link will be sent to that Email address'.

Organization-Wide Addresses

Edit Organization-Wide Email Addresses

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

Save Save and New Cancel

Organization-Wide Email Address

Display Name

Email Address

☒ Allow All Profiles to Use this From Address
☐ Allow Only Selected Profiles to Use the From Address

Profiles

- Minimum Access - Salesforce
- External Apps Login User
- System Administrator
- Analytics Cloud Integration User
- Analytics Cloud Security User
- Standard Platform User
- Customer Community Login User
- Cross Org Data Proxy User
- Authenticated Website
- Work.com Only User

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

The screenshot shows the Salesforce Setup interface for configuring Organization-Wide Email Addresses. The browser address bar shows the URL: `asagarwal-flows-dev-ed.lightning.force.com/lightning/setup/OrgWideEmailAddresses/page?address=%2Femail-admin%2Fowa%2FlistOrgWideEmailAddress.apexp%3FsfidclFram...`. The left sidebar contains a search bar with "Organization" and a list of navigation items including "Email" and "Organization-Wide Addresses". The main content area is titled "Organization-Wide Email Addresses" and includes a description: "An organization-wide email address associates a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address." Below this, there are two sections: "User Selectable Organization-Wide Email Addresses" and "Special Purpose Organization-Wide Email Addresses". The first section contains a table with one entry for Ashish Agarwal. The second section has a warning message: "WARNING: A VERIFIED email address is needed for: [Default No-Reply Address]". A red callout box highlights the status of the email address.

Organization-Wide Email Addresses

An organization-wide email address associates a single email address to a user profile. Each user 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](#)

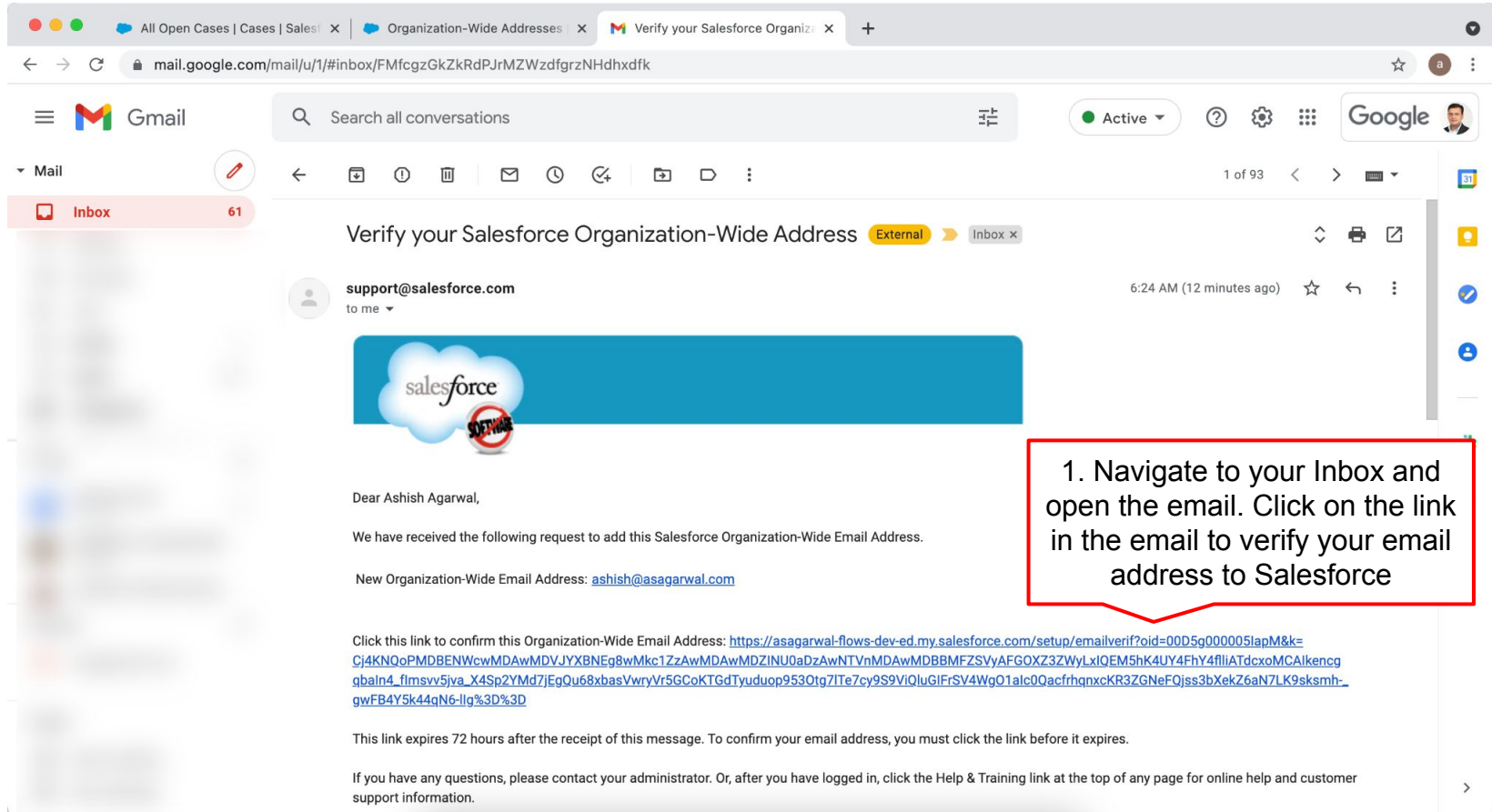
Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date
Edit Del	Ashish Agarwal	ashish@asagarwal.com	All Profiles	Verification Request Sent 8/7/2021 [Resend]	8/7/2021

Special Purpose Organization-Wide Email Addresses [Add](#)

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

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

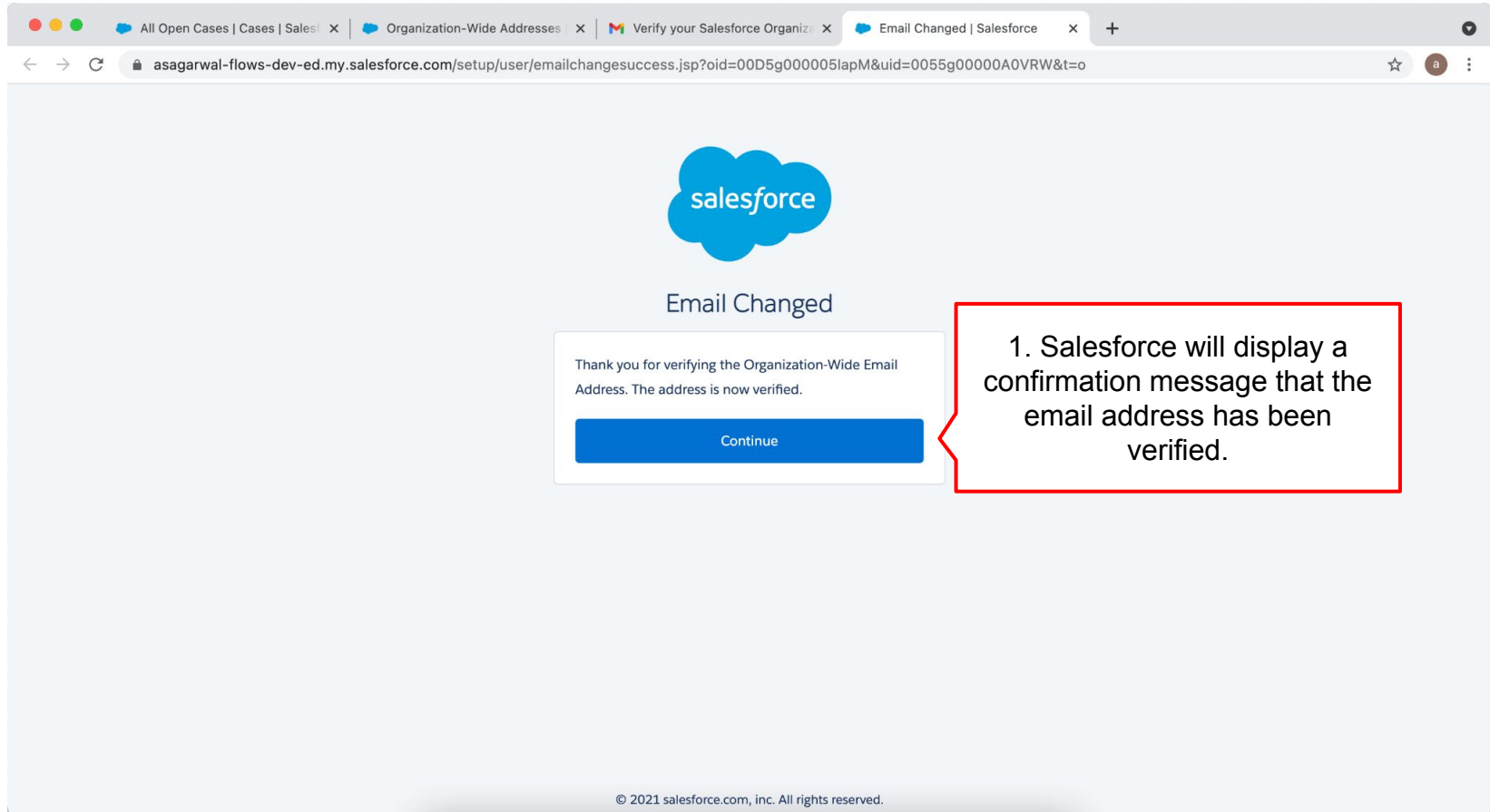
Configure Process Automation Settings



The screenshot shows a Gmail interface with an email from **support@salesforce.com** titled "Verify your Salesforce Organization-Wide Address". The email content includes a Salesforce logo, a greeting "Dear Ashish Agarwal," and a request to add a new Organization-Wide Email Address: ashish@asagarwal.com. A long URL is provided for verification, and a note states the link expires 72 hours. A red box with a white border contains the instruction: "1. Navigate to your Inbox and open the email. Click on the link in the email to verify your email address to Salesforce".

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



The screenshot shows a web browser window with multiple tabs. The active tab is titled 'Email Changed | Salesforce'. The address bar shows the URL: `asagarwal-flows-dev-ed.my.salesforce.com/setup/user/emailchangesuccess.jsp?oid=00D5g000005lapM&uid=0055g00000A0VRW&t=o`. The page content features the Salesforce logo at the top, followed by the heading 'Email Changed'. Below this is a confirmation message: 'Thank you for verifying the Organization-Wide Email Address. The address is now verified.' and a blue 'Continue' button. A red callout box points to the 'Continue' button with the text: '1. Salesforce will display a confirmation message that the email address has been verified.'

salesforce

Email Changed

Thank you for verifying the Organization-Wide Email Address. The address is now verified.

Continue

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

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Configure Process Automation Settings

The screenshot shows the Salesforce Setup interface for 'Organization-Wide Email Addresses'. The left sidebar contains a search bar with 'Organization' and a list of navigation items including 'Email' and 'Organization-Wide Addresses'. The main content area has a header 'SETUP Organization-Wide Addresses' and a sub-header 'Organization-Wide Email Addresses'. Below this is a descriptive paragraph: 'An organization-wide email address associates a single email address to a user profile. Each user in the profile can send email using this address. Users will share the same display name and email address.' There are two sections: 'User Selectable Organization-Wide Email Addresses' and 'Special Purpose Organization-Wide Email Addresses'. The first section contains a table with one row of data.

Actions	Display Name	Email Address	Allowed Profiles	Status	Created Date
Edit Del	Ashish Agarwal	ashish@asagarwal.com	All Profiles	Verified	8/7/2021

Below the table is a 'Special Purpose Organization-Wide Email Addresses' section with a red warning message: 'WARNING: A VERIFIED email address is needed for: [Default No-Reply Address]'.

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'

- Q 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

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 associated with the actions that are executed by the automation.

Default Workflow User

Ashish Agarwal

By default, the Automated Process User has no email address, so event processes 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.

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

Configure Process Automation Settings

Process Automation Settings | x +

asagarwal-flows-dev-ed.lightning.force.com/lightning/setup/WorkflowSettings/home

Guest

Search Setup

Setup Home Object Manager

Process Automation

Process Automation Settings

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

SETUP
Process Automation Settings

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 user can pause the flow and resume it later.

Let users resume interviews that are shared with them, either directly or via the role hierarchy. When the user resumes the interview, the flow resumes from the point where it was paused.

Flows launched from a URL or from Setup use the Lightning runtime experience instead of the classic actions.

Change the required permission to view all charts on the Automation Home page in Setup. By default, View Setup and Configuration can view only the Total Started Automations by Process type chart.

Require the Manage Flow permission to view all Automation Home charts

This setting affects Lightning Experience only. On the Flows page in Setup, use an enhanced flow, disabled or using Salesforce Classic, the Flows page displays custom flows, paused flows, and process flows.

In Lightning Experience, use the enhanced Flows page and separate Paused and Scheduled Automations page

This setting affects flows in API version 51.0 or earlier. When creating or updating records, the flow can use record variables to define the field values. If the running user doesn't have edit access to those fields, by default the flow fails to create or update the records. This setting filters the inaccessible fields from the request for Create Records and Update Records elements.

Filter inaccessible fields from flow requests

Allows Apex code to set and remove approval process locks.

Enable record locking and unlocking in Apex

When this setting is enabled, users with the Manage Flow and View All Data permissions can specify the running user each time they debug a flow.

Let admins debug flows as other users

When you debug a flow as another user, the flow's record changes and actions are performed as that user. Also, the user's profile and permission sets determine the object permissions and field-level access of the flow. However, flows that always run in system context ignore the user's object permissions and field-level access.

When a process or flow interview fails, Salesforce sends an email with details about everything that was executed and what failed. The details include the data that's involved in the process or flow, including user-entered data.

1. Check the boxes in your Salesforce Org as shown here. We will go into the details of these settings in subsequent chapters. For now just notice the setting for 'Enable Lightning for flows'

Configure Process Automation Settings

Process Automation Settings | x +

asagarwal-flows-dev-ed.lightning.force.com/lightning/setup/WorkflowSettings/home

Guest

Search Setup

Setup Home Object Manager

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

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.

Enable Lightning runtime for flows ☒

Change the required permission to view all charts on the Automation Home page in Setup. By default, users with the View Setup and Configuration permission can view all charts. When this setting is enabled, users with View Setup and Configuration can view only the Total Started Automations by Process Type chart.

Require the Manage Flow permission to view all Automation Home charts ☐

This setting affects Lightning Experience only. On the Flows page in Setup, use an enhanced flow list view that includes standard flows. On a separate page, view paused flows and process scheduled actions. When disabled or using Salesforce Classic, the Flows page displays custom flows, paused flows, and process scheduled actions. The separate page isn't available.

In Lightning Experience, use the enhanced Flows page and separate Paused and Scheduled Automations page ☒

This setting affects flows in API version 51.0 or earlier. When creating or updating records, the flow can use record variables to define the field values. If the running user doesn't have edit access to those fields, by default the flow fails to create or update the records. This setting filters the inaccessible fields from the request for Create Records and Update Records elements.

Filter inaccessible fields from flow requests ☒

Allows Apex code to set and remove approval process locks.

Enable record locking and unlocking in Apex ☒

When this setting is enabled, users with the Manage Flow and View All Data permissions can specify the running user each time they debug a flow.

Let admins debug flows as other users ☒

When you debug a flow as another user, the flow's record changes and actions are performed as that user. Also, the user's profile and permission sets determine the object permissions and field-level access of the flow. However, flows that always run in system context ignore the user's object permissions and field-level access.

When a process or flow interview fails, Save data.

Send Process or Flow Error Email to

1. Scroll down and save the settings

Save Cancel

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

Begin With the End in Mind

The screenshot shows the Salesforce Home page. At the top, there's a navigation bar with 'Home | Salesforce' and a search bar. Below this, the 'Sales Console' is active, showing a 'Home' tab. The main content area is divided into several sections: 'Quarterly Performance' with a line chart, 'Today's Events', 'Today's Tasks', and 'New Account Screen Flow'.

Quarterly Performance

Metric	Value
CLOSED	\$2,645,000
OPEN (>70%)	\$665,000
GOAL	--

The chart shows a line for 'Closed + Open (>70%)' starting at 0 in April, rising to about 1.6M in May, and reaching 2.4M in June. A goal line is set at 3.2M.

New Account Screen Flow

Please enter the Account details.

* Account Name

Website

Assistant

Nothing needs your attention right now. Check back later.

What are we trying to build?

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.

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 !)

Flow Label ↑	Process Type	Active	Tem...	Package State	Pack...	Last ...	Last ...
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create a Case	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Order Summary Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Process Exception Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Discount Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Inbound Cancel Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Inbound Modify Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Inbound New Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Inbound New Guest Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Outbound Modify Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Outbound New Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Reset Password	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

How To Create a Flow?

The screenshot shows the Salesforce Flow Builder interface. The browser address bar displays the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app`. The page title is "New Flow". On the left, there is a "Toolbox" and "Elements" panel. The main area displays six flow types, each with an icon and a description:

- Screen Flow** (Icon: Monitor): Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and...
- Record-Triggered Flow** (Icon: Document with checkmark): Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
- Schedule-Triggered Flow** (Icon: Clock): Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
- Platform Event—Triggered Flow** (Icon: Signal tower): Launches when a platform event message is received. This autolaunched flow runs in the background.
- Autolaunched Flow (No Trigger)** (Icon: Sparkles): Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

At the bottom right, there is a "Next" button.

1. There are different types of Flows that you can create in Salesforce. Let's start by creating a Screen Flow

2. Click Next

How To Create a Flow?

The screenshot shows the Salesforce Flow Builder interface. The browser address bar displays the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app`. The interface includes a sidebar with a 'Toolbox' and 'Elements' section. A central canvas displays a choice between two flow building methods:

- Freeform**: A diagram showing a flow starting with a teal circle, followed by an orange diamond, then branching into a pink square and a blue square, which then connect to an orange square. The text below reads: "You control the placement of all elements and connectors on the canvas."
- Auto-Layout Beta**: A diagram showing a flow starting with a teal circle, followed by an orange diamond, which then branches into three parallel paths (pink square, blue square, pink square), each ending with an orange square. The text below reads: "We automatically position all elements and connectors for you."

A red box highlights the text "1. Click on Freeform" above the Freeform diagram.

How To Create a Flow?

The screenshot shows the Salesforce Flow Builder interface. At the top, there's a navigation bar with 'Flow Builder' and a user profile. Below this is a toolbar with icons for undo, redo, save, and settings, followed by a toggle for 'Auto-Layout (Beta)' and buttons for 'Run', 'Debug', 'Activate', 'Save As', and 'Save'. On the left is a 'Toolbox' with 'Elements' and 'Manager' tabs. The 'Elements' tab is active, showing categories: 'Interaction (3)' with Screen, Action, and Subflow; 'Logic (4)' with Assignment, Decision, Loop, and Collection Sort; and 'Data (4)' with Create Records, Update Records, Get Records, and Delete Records. The main area is a large canvas for building the flow. At the bottom left, there's a button 'Get more on the AppExchange'.

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

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

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

The screenshot displays the Salesforce Flow Builder interface. At the top, a dark blue header bar contains a back arrow icon on the left and a help icon (a question mark) on the right. Below the header, a light gray toolbar includes icons for undo, redo, save, and settings, followed by a toggle for 'Auto-Layout (Beta)' and buttons for 'Run', 'Debug', and 'Activate'. On the right side of the toolbar, a dropdown menu is open, showing options: 'Flow Builder Help', 'Keyboard Help', 'Trailhead', 'Trailblazer Community', 'View Tips', and 'Mute Tips'. The left sidebar, titled 'Toolbox', is divided into 'Elements' and 'Manager' tabs. Under the 'Elements' tab, there are three categories: 'Interaction (3)' with 'Screen', 'Action', and 'Subflow'; 'Logic (4)' with 'Assignment', 'Decision', 'Loop', and 'Collection Sort'; and 'Data (4)' with 'Create Records', 'Update Records', 'Get Records', and 'Delete Records'. The main workspace in the center features a large light gray box with a green play button icon and the text 'Start Screen Flow'. At the bottom of the workspace, there are zoom controls (a grid icon, minus, plus, and a reset icon).

How To Create a Flow?

The screenshot shows the Salesforce Flow Builder interface. The browser address bar displays the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app`. The interface includes a top navigation bar with a 'Flow Builder' tab and a user profile 'Guest'. Below the navigation bar is a toolbar with icons for undo, redo, save, and settings, along with buttons for 'Auto-Layout (Beta)', 'Run', 'Debug', 'Activate', 'Save As', and 'Save'. The main workspace is divided into three sections: a 'Toolbox' on the left, a central canvas, and a right-hand panel. The 'Toolbox' is further divided into 'Elements' and 'Manager' tabs. The 'Elements' tab is expanded, showing three categories: 'Interaction (3)' with 'Screen', 'Action', and 'Subflow'; 'Logic (4)' with 'Assignment', 'Decision', 'Loop', and 'Collection Sort'; and 'Data (4)' with 'Create Records', 'Update Records', 'Get Records', and 'Delete Records'. A red box highlights the 'Elements' tab and its categories. The central canvas shows a 'Start' element, represented by a green play button icon, with the text 'Start' and 'Screen Flow' below it. A red box highlights this 'Start' element. The right-hand panel is currently empty.

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.

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

How To Create a Flow?

Flows | Salesforce

Flow Builder

asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app

Guest

Flow Builder

Auto-Layout (Beta)

Run Debug Activate Save As Save

Toolbox

Elements **Manager**

Search this flow...

New Resource

Start Screen 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

The screenshot displays the Salesforce Flow Builder web application. The browser's address bar shows the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app`. The interface includes a top navigation bar with a 'Guest' user profile and a 'Help' icon. Below this is a toolbar with an 'Auto-Layout (Beta)' toggle and buttons for 'Run', 'Debug', 'Activate', 'Save As', and 'Save'. The left sidebar contains a list of flow elements categorized into 'Integration (3)', 'Logic (4)', and 'Data (4)'. The 'Screen' element, represented by a monitor icon, is highlighted in the 'Integration' section. A red arrow points from the 'Screen' element to the main canvas area, which currently shows a 'Start Screen Flow' element. At the bottom of the sidebar, there is a link to 'Get more on the AppExchange'.

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?

The screenshot shows the Salesforce Flow Builder interface. The browser address bar displays `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app`. The interface includes a left sidebar with a 'Toolbox' and 'Elements' panel, a central canvas, and a right sidebar with 'Screen Properties'.

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

This annotation points to the 'Control Navigation' section in the 'Screen Properties' panel. It is checked, and the 'Pause' button is highlighted in the canvas. The canvas also shows 'Previous' and 'Finish' buttons.

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

This annotation points to the 'Pause Confirmation Message' section in the 'Screen Properties' panel. It is currently empty, with a placeholder text 'Insert a resource...'. The 'Done' button is visible at the bottom right of the panel.

How To Create a Flow?

The screenshot displays the Salesforce Flow Builder interface. A 'New Screen' dialog box is open, showing the 'Components' panel on the left with a search bar and a list of components under categories like Interaction, Logic, and Data. The central canvas shows a '[Flow Label]' with a small 'i' icon in the top right corner. A red callout box points to this icon with the text: '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'. The right panel shows 'Screen Properties' with a 'Provide Help' section containing a 'Help Text' field with the text 'This form is to create a new Account Record.' and a 'Screen Properties' section with font settings (Salesforce Sans, size 12). Buttons for 'Cancel' and 'Done' are at the bottom right.

How To Create a Flow?

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

The screenshot shows the Salesforce Flow Builder interface. On the left, the 'Search Components' box is open, showing a search bar with 'Disp' entered. Below the search bar, the 'Display (1)' category is expanded, showing 'Display Text' and 'Display Image'. A red arrow points from the instruction text to the 'Display Text' component. The 'New Screen' dialog box is open in the center, showing a canvas with a '[Flow Label]' and a green bar. The 'Screen Properties' panel on the right shows 'Previous' and 'Pause' checked, and 'Salesforce Sans' font selected. The 'Done' button is highlighted in blue.

How To Create a Flow?

The screenshot shows the Salesforce Flow Builder interface. A 'New Screen' dialog box is open, displaying the 'Components' tab. The search bar contains 'Dis', and the 'Display Text' component is selected. The main area shows the configuration for the 'Display Text' component, including the text 'Please enter the Account details.' and buttons for 'Pause', 'Previous', and 'Finish'. A red box highlights the 'API Name' field, which contains 'DisplayMessage'. Another red box highlights the 'Done' button at the bottom right of the dialog.

1. Enter the API Name and the text that needs to be displayed

2. Click Done

How To Create a Flow?

The screenshot shows the Salesforce Flow Builder interface. The browser address bar displays `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app`. The interface includes a 'Toolbox' on the left with 'Elements' and 'Manager' tabs. Under 'Interaction (3)', there are 'Screen' and 'Action' elements. Under 'Data (4)', there are 'Create Records', 'Update Records', 'Get Records', and 'Delete Records'. The main canvas shows a flow diagram with a 'Start Screen Flow' element (green play button icon) and a 'Screen Account Form' element (blue screen icon). A red callout box points to the 'Screen' element in the toolbox, stating: '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'. Another red callout box points to the connection point between the 'Start Screen Flow' and 'Screen Account Form' elements, stating: '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'. The 'Screen Account Form' element has a label 'Account Form' below it. The top right of the interface shows 'Auto-Layout (Beta)' toggle, 'Run', 'Debug', 'Activate', 'Save As', and 'Save' buttons.

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?

The screenshot shows the Salesforce Flow Builder interface. The browser address bar displays `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app`. The interface includes a sidebar with a 'Toolbox' containing 'Interaction', 'Logic', and 'Data' categories. The main canvas shows a flow diagram with a 'Start Screen Flow' element connected to a 'Screen Account Form' element. Two callout boxes provide instructions on connecting elements and saving work frequently. A yellow box at the bottom right contains a 'Best Practice Tip'.

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?

Save the flow

Flow Label: New Account Screen Flow

Flow API Name: New_Account_Screen_Flow

Description: This is a screen flow to create a new Account record

Hide Advanced

How to Run the Flow ⓘ

Select...

- User or System Context—Depends on How Flow is Launched
- System Context with Sharing—Enforces Record-Level Access
- System Context Without Sharing—Access All Data

Interview Label ⓘ

Insert a resource...

New Account Flow {!\$Flow.CurrentDateTime}

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?

The screenshot shows the Salesforce Flow Builder interface. A modal dialog titled "Save the flow" is open, allowing the user to configure the flow's metadata. The dialog includes fields for "Flow Label" (set to "New Account Screen Flow"), "Flow API Name" (set to "New_Account_Screen_Flow"), and a "Description" (set to "This is a screen flow to create a new Account record"). Below these fields, there is a "How to Run the Flow" section with a "Type" dropdown menu. The "Type" dropdown is currently set to "Screen Flow", and a list of other flow types is visible below it: Record-Triggered Flow, Schedule-Triggered Flow, Platform Event—Triggered Flow, Autolaunched Flow (No Trigger), User Provisioning Flow, Salesforce Scheduler Flow, and Contact Request Flow. A red callout box points to the "Type" dropdown with the text: "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."

Save the flow

Flow Label: New Account Screen Flow

Flow API Name: New_Account_Screen_Flow

Description: This is a screen flow to create a new Account record

Hide Advanced

How to Run the Flow

Select...

Type

Screen Flow

- Screen Flow
- Record-Triggered Flow
- Schedule-Triggered Flow
- Platform Event—Triggered Flow
- Autolaunched Flow (No Trigger)
- User Provisioning Flow
- Salesforce Scheduler Flow
- Contact Request 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?

The screenshot shows the 'Save the flow' dialog in the Salesforce Flow Builder. The dialog has the following fields and callouts:

- Name:** 'New Account Screen Flow' and 'New_Account_Screen_Flow'. Callout 1: '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'.
- Description:** 'This is a screen flow to create a new Account record'.
- How to Run the Flow:** A dropdown menu with 'Select...'.
- Type:** 'Screen Flow'. Callout 2: '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'.
- API Version for Running the Flow:** '52'.
- Interview Label:** 'New Account Flow {!\$Flow.CurrentDateTime}'. Callout 3: '3. Ok, let's save the flow now'.

At the bottom of the dialog are 'Cancel' and 'Save' buttons.

How To Create a Flow?

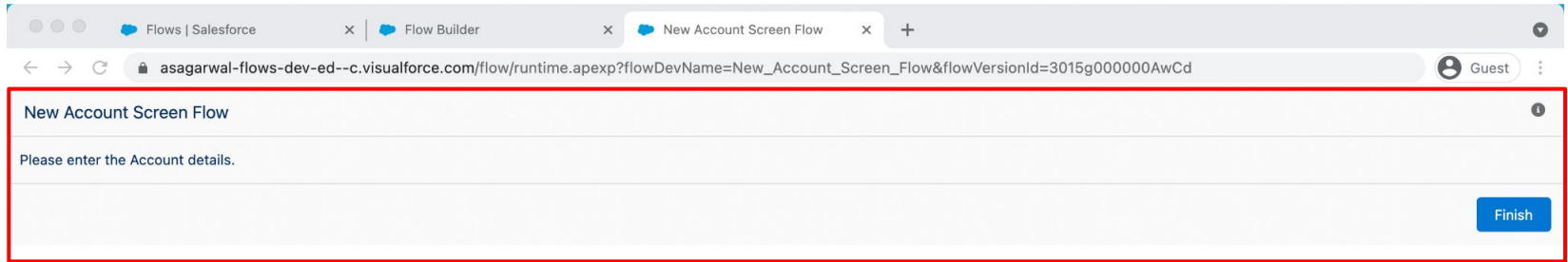
The screenshot shows the Salesforce Flow Builder interface. The browser address bar displays the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000AwCdAAK`. The page title is 'New Account Screen Flow - V1'. The interface includes a left sidebar with a 'Logic' section containing 'Assignment', 'Decision', 'Loop', and 'Collection Sort', and a 'Data' section containing 'Create Records', 'Update Records', 'Get Records', and 'Delete Records'. The main canvas shows a 'Start Screen Flow' step connected to a 'Screen Account Form' step. The flow is currently in an 'Inactive' state, as indicated by the text 'Version 1: Inactive—Last modified a few seconds ago'. At the top right, there are buttons for 'Run', 'Debug', 'Activate', 'Save As', and 'Save'. A red callout box points to the 'Run' button, and another red callout box points to the 'Activate' button.

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.

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

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?

The screenshot shows the Salesforce Flow Builder interface. The browser address bar displays the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000AwCdAAK`. The page title is 'New Account Screen Flow - V1'. The interface includes a 'Toolbox' on the left with categories: Elements, Manager, Interaction (3), Logic (4), and Data (4). The 'Interaction' category is expanded, showing 'Screen', 'Action', and 'Subflow'. The 'Logic' category is also expanded, showing 'Assignment', 'Decision', 'Loop', and 'Collection Sort'. The 'Data' category is expanded, showing 'Create', 'Update', 'Get', and 'Delete'. The main canvas shows a 'Start Screen Flow' element connected to a 'Screen Account Form' element. A red box highlights the 'Screen Account Form' element with the text: '1. Let's add more components to our screen flow. Double click on the screen flow element on the Canvas'.

1. Let's add more components to our screen flow. Double click on the screen flow element on the Canvas

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

The screenshot displays the Salesforce Flow Builder interface for a 'New Account Screen Flow'. The left sidebar contains a search bar with 'Text' entered, and a list of components under various categories. The main canvas shows a form with a text input field labeled 'Account Name'. The right-hand panel shows the configuration for the 'Text' component, including fields for 'Label' (Account Name) and 'API Name' (AccountName), and a 'Require' checkbox which is checked. Red callout boxes with arrows point to the search bar, the 'Text' component in the canvas, and the 'Require' checkbox, corresponding to the numbered steps in the text blocks.

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

The screenshot displays the Salesforce Flow Builder interface for a flow named 'New Account Screen Flow'. The interface is in 'Edit Screen' mode. On the left, a sidebar lists various components: Screen, Action, Subflow, Logic (4), Assignment, Decision, Loop, Collection, and Data (4). The 'URL' component is selected in the search box. A red arrow points from the 'URL' component in the search box to the 'Website' text field on the canvas. The canvas shows a text input field labeled 'Website' with a 'URL' component icon above it. The right-hand configuration panel for the 'URL' component is visible, showing fields for 'API Name' (set to 'Website') and 'Label' (set to 'Website'). A red bracket groups the 'API Name' and 'Label' fields. At the bottom right of the configuration panel are 'Cancel' and 'Done' buttons. A red box highlights the 'Done' button.

How To Create a Flow?

The screenshot shows the Salesforce Flow Builder interface. The browser address bar displays the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000AwCdAAK`. The page title is "New Account Screen Flow - V1". The interface includes a "Toolbox" on the left with categories: "Elements" (selected), "Manager", "Interaction (3)" (Screen, Action, Subflow), "Logic (4)" (Assignment, Decision, Loop, Collection Sort), and "Data (4)" (Create Records, Update Records, Delete Records, Upsert Records). A red arrow points from the "Create Records" component in the "Data" category to the canvas. The canvas shows a flow starting with a "Start Screen Flow" component, followed by a "Screen Account Form" component. A red box highlights the first step: "1. Click and drag the 'Create Records' component on canvas". A yellow box on the right states: "Next, we will create a new record in Account object with the information provided".

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?

The screenshot shows the Salesforce Flow Builder interface for creating a new flow. The left sidebar contains a 'Toolbox' with categories: 'Interaction' (Screen, Action, Subflow), 'Logic' (Assignment, Decision, Loop, Collection Sort), and 'Data' (Create Records, Update Records, Get Records, Delete Records). The main area is titled 'New Create Records' and contains the following configuration options:

- Create Salesforce records using values from the flow.**
 - * Label:** Create Account Record
 - * API Name:** Create_Account_Record
 - Description:** Create Record in Account object with the input provided by user
- How Many Records to Create:** ☒ One, ☐ Multiple
- How to Set the Record Fields:** ☐ Use all values from a record, ☒ Use separate resources, and literal values
- Create a Record of This Object:**
 - * Object:** Account

Red callout boxes with numbers 1 through 5 provide step-by-step instructions for configuring the flow:

1. Let's configure the 'Create Record' element. Specify the label, API Name and Description
2. Select records to create as 'One'
3. For records fields, select 'Use separate resources, and literal values'
4. For object, select 'Account'
5. Scroll down

How To Create a Flow?

Flows | Salesforce

Flow Builder

asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000AwCdAAK

Guest

Flow Builder

New Account Screen Flow - V1

Toolbox

Elements Manager

Interaction (3)

Screen

Action

Subflow

Logic (4)

Create Records

Update Records

Get Records

Delete Records

Get more on the AppExchange

New Create Records

One

Multiple

How to Set the Record Fields

Use all values from a record

Use separate resources, and literal values

Create a Record of This Object

* Object

Account

Set Field Values for the Account

Field

Name

Value

AccountName

Field

Website

Value

Website > Value

Manually assign variables

Cancel

Done

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?

The screenshot shows the Salesforce Flow Builder interface. The browser address bar displays the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000AwCdAAK`. The page title is "New Account Screen Flow - V1". The interface includes a "Toolbox" on the left with categories: Elements, Manager, Interaction (3), Logic (4), and Data (4). The "Elements" category is selected, showing options like Screen, Action, Subflow, Assignment, Decision, Loop, Collection Sort, Create Records, Update Records, Get Records, and Delete Records. The main canvas displays a flow diagram with three elements: "Start Screen Flow", "Screen Account Form", and "Create Records Create Account Record". A red box highlights the connection point between the "Screen Account Form" and "Create Records" elements, with a text box explaining the process: "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".

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?

The screenshot shows the Salesforce Flow Builder interface. The browser address bar displays the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000AwCdAAK`. The page title is "New Account Screen Flow - V1". The interface includes a "Toolbox" on the left with categories: Elements (Screen, Action, Subflow), Logic (Assignment, Decision, Loop, Collection Sort), and Data (Create Records, Update Records, Get Records, Delete Records). The main canvas shows a flow diagram with three elements connected by arrows: "Start Screen Flow" (a green play button icon), "Screen Account Form" (a blue screen icon), and "Create Records Create Account Record" (a pink plus icon). Three red boxes with white text are overlaid on the diagram, providing instructions:

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

At the bottom of the interface, there is a blue button that says "Get more on the AppExchange".

How To Create a Flow?

New Account Screen Flow

Please enter the Account details.

* Account Name
ASAGARWAL.COM PTE. LTD.

Website
https://www.asagarwal.com

Next

2. Click Next

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

How To Create a Flow?

The screenshot shows a web browser window with three tabs: 'Flows | Salesforce', 'Flow Builder', and 'New Account Screen Flow'. The address bar shows the URL: `asagarwal-flows-dev-ed--c.visualforce.com/flow/runtime.apexp?flowDevName=New_Account_Screen_Flow&flowVersionId=3015g000000AwGk`. The page title is 'New Account Screen Flow'. Below the title, there is a message: 'Please enter the Account details.' followed by a red asterisk and the label 'Account Name'. There is a text input field for 'Account Name' and a text input field for 'Website'. At the bottom right, there is a blue button labeled 'Next'.

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?

The screenshot shows the Salesforce interface with the 'Accounts' tab selected. A red box highlights the first step of the tutorial, which is a numbered list item. The list view displays 14 accounts, sorted by Account Name. The accounts are listed in a table with columns: Account Name, Account Site, Billing State/Province, Phone, Type, and Account Owner Alias. The first account is ASAGARWAL.COM PTE. LTD. with Account Site Burlington Textiles, Billing State/Province NC, Phone (336) 222-7000, Type Customer - Direct, and Account Owner Alias AAgar. The second account is Burlington Textiles Corp of America with Account Site KS, Billing State/Province TX, Phone (785) 241-6200, Type Customer - Channel, and Account Owner Alias AAgar. The third account is Burlington Textiles Corp of America with Account Site OR, Billing State/Province CA, Phone (512) 757-6000, Type Customer - Direct, and Account Owner Alias AAgar. The fourth account is Burlington Textiles Corp of America with Account Site IL, Billing State/Province CA, Phone (503) 421-7800, Type Customer - Channel, and Account Owner Alias AAgar. The fifth account is Burlington Textiles Corp of America with Account Site CA, Billing State/Province IL, Phone (650) 867-3450, Type Customer - Channel, and Account Owner Alias AAgar. The sixth account is Burlington Textiles Corp of America with Account Site IL, Billing State/Province CA, Phone (312) 596-1000, Type Customer - Direct, and Account Owner Alias AAgar. The seventh account is Burlington Textiles Corp of America with Account Site CA, Billing State/Province IL, Phone (014) 427-4427, Type Customer - Channel, and Account Owner Alias AAgar. The eighth account is Burlington Textiles Corp of America with Account Site CA, Billing State/Province CA, Phone autoproc, and Account Owner Alias AAgar. The ninth account is Burlington Textiles Corp of America with Account Site CA, Billing State/Province CA, Phone (415) 901-7000, Type Customer - Direct, and Account Owner Alias AAgar. The tenth account is Burlington Textiles Corp of America with Account Site NY, Billing State/Province NY, Phone (212) 842-5500, Type Customer - Direct, and Account Owner Alias AAgar. The eleventh account is Burlington Textiles Corp of America with Account Site Singapore, Billing State/Province Singapore, Phone (650) 450-8810, Type Customer - Direct, and Account Owner Alias AAgar. The twelfth account is Burlington Textiles Corp of America with Account Site UK, Billing State/Province UK, Phone +44 191 4956203, Type Customer - Direct, and Account Owner Alias AAgar. The thirteenth account is Burlington Textiles Corp of America with Account Site AZ, Billing State/Province AZ, Phone (520) 773-9050, Type Customer - Direct, and Account Owner Alias AAgar. The fourteenth account is Burlington Textiles Corp of America with Account Site AZ, Billing State/Province AZ, Phone (520) 773-9050, Type Customer - Direct, and Account Owner Alias AAgar.

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

	Account Name ↑	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
1	ASAGARWAL.COM PTE. LTD.					AAgar
2	Burlington Textiles Corp of America	NC		(336) 222-7000	Customer - Direct	AAgar
3		KS		(785) 241-6200	Customer - Channel	AAgar
4		TX		(512) 757-6000	Customer - Direct	AAgar
5		OR		(503) 421-7800	Customer - Channel	AAgar
6		CA		(650) 867-3450	Customer - Channel	AAgar
7		IL		(312) 596-1000	Customer - Direct	AAgar
8				(014) 427-4427	Customer - Channel	AAgar
9						autoproc
10		CA		(415) 901-7000		AAgar
11	United Oil & Gas Corp.	NY		(212) 842-5500	Customer - Direct	AAgar
12	United Oil & Gas, Singapore	Singapore		(650) 450-8810	Customer - Direct	AAgar
13	United Oil & Gas, UK	UK		+44 191 4956203	Customer - Direct	AAgar
14	University of Arizona	AZ		(520) 773-9050	Customer - Direct	AAgar

How To Create a Flow?

← Flow Builder New Account Screen Flow - V1 ?

Auto-Layout (Beta) Version 1: Inactive—Last modified 11 minutes ago Run Debug Activate Save As Save

1. Drag another screen element from toolbox onto canvas

The screenshot shows the Salesforce Flow Builder interface. On the left is a toolbox with categories: Screen, Action, Subflow, Logic (4), and Data (4). The 'Screen' category is highlighted, and a red arrow points from it to a 'Screen' element in the flow diagram. The flow diagram consists of three steps: 'Start Screen Flow', 'Screen Account Form', and 'Create Records Create Account Record'. A red arrow also points from the 'Screen' element in the toolbox to the 'Screen Account Form' step in the diagram. At the bottom left, there is a link 'Get more on the AppExchange'.

To make this flow more intuitive, we will display the confirmation screen to the user once the account is created.

How To Create a Flow?

The screenshot shows the Salesforce Flow Builder interface. A "New Screen" dialog box is open, allowing the user to create a new screen for the "New Account Screen Flow".

Components: The "Components" tab is selected, showing a list of input components. The "Input (36)" category is expanded, listing components like Address, Call Script, Cancel Appointment, Checkbox, Currency, Date, and Date & Time. A "Get more on the AppExchange" button is at the bottom.

Screen Properties: The "Screen Properties" section contains the following fields:

- Label:** Confirmation Screen
- API Name:** Confirmation_Screen
- Description:** This screen will be displayed to the user once the account record is successfully created.

A red bracket groups the Label, API Name, and Description fields, with a callout box pointing to them containing the text "1. Enter the screen label, API Name & Description".

Configure Frame: The "Configure Frame" section is expanded, showing options for "Show Header" and "Show Footer", both of which are checked.

Buttons at the bottom of the dialog include "Cancel" and "Done".

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?

The screenshot shows the Salesforce Flow Builder interface. The browser address bar indicates the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000AwGkAAK`. The page title is "New Account Screen Flow - V1". The interface includes a "Toolbox" on the left with categories like "Interaction (3)", "Logic (4)", and "Data (4)". The "Components" tab is active, showing a search bar and a list of components. The "Display Text" component is selected, and its configuration is shown on the right. A red arrow points to the "Insert a resource..." box in the configuration panel, which contains the text "Account <name> with URL <url> has been successfully created." A red box highlights the text "1. To replace <name> with account name, highlight the text and click on 'Insert a resource ...' box".

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

How To Create a Flow?

The screenshot shows the Salesforce Flow Builder interface. The browser address bar indicates the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000AwGkAAK`. The page title is "New Account Screen Flow - V1". The interface includes a "Toolbox" on the left with categories like "Interaction (3)", "Logic (4)", and "Data (4)". A "New Screen" dialog box is open, showing a search bar with "Displ" and a list of components. A red box highlights the text "1. Select 'AccountName'" with an arrow pointing to the "AccountName" component in the "SCREEN COMPONENTS" list.

New Screen

Components Fields (Beta)

Display (1)

Display Text

Input (1)

Display Image

Get more on the AppExchange

New Account Screen Flow

Display Text

Account "<name>" with URL "<url>" has been successfully created.

Pause Previous Finish

Display Text

API Name

ConfirmationMessage

Insert a resource...

New Resource

SCREEN COMPONENTS

AccountName Text

DisplayMessage Display Text

Website URL

SCREENS

Account_Form Account Form

1. Select 'AccountName'

How To Create a Flow?

The screenshot shows the Salesforce Flow Builder interface. A 'New Screen' dialog box is open, displaying a 'Display Text' component. The text in the component is 'Account \"{!AccountName}\" with URL \"{<url>\" has been successfully created.' A red box highlights a callout text explaining the merge field syntax.

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?

The screenshot shows the Salesforce Flow Builder interface. A 'New Screen' dialog box is open, displaying a 'Display Text' component. The text in the component is 'Account \"{{AccountName}}\" with URL \"{{Website.value}}\" has been successfully created.' A red box highlights this text and the 'Done' button at the bottom right of the dialog. A red arrow points from the text box to the 'Done' button. The background shows the Flow Builder interface with a 'New Account Screen Flow - V1' title and various toolbars and components.

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

How To Create a Flow?

The screenshot displays the Salesforce Flow Builder interface. The browser address bar shows the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000AwGkAAK`. The page title is "New Account Screen Flow - V1". The interface includes a "Toolbox" on the left with categories: Elements, Manager, Interaction (3), Logic (4), and Data (4). The main canvas shows a flow diagram with the following steps:

- Start Screen Flow** (Start node)
- Screen Account Form** (Screen node)
- Create Records** (Create Account Record node)
- Confirmation Screen** (Screen node)

The flow connects the Start node to the Screen Account Form node, then to the Create Records node, and finally to the Confirmation Screen node. Red callouts provide instructions:

- 1. Connect the confirmation screen with Create Records
- 2. Click 'Save'
- 3. Click 'Run' to test your Flow

How To Create a Flow?

New Account Screen Flow

Please enter the Account details.

* Account Name
Globex Corporation

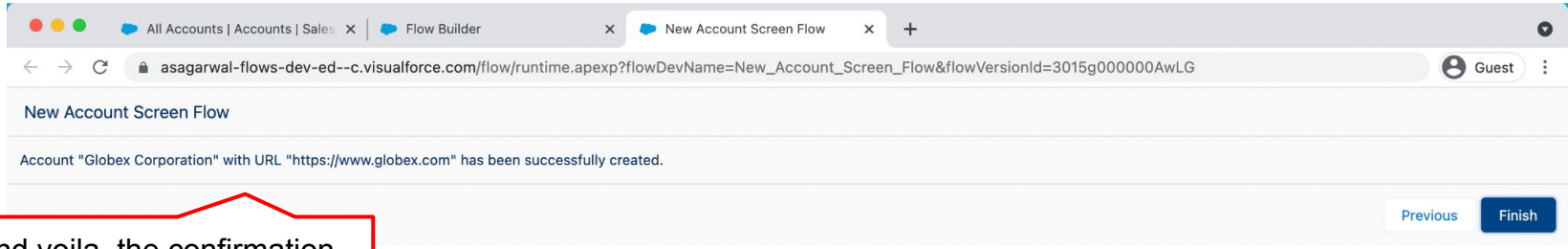
Website
https://www.globex.com

Next

1. Enter the account name and Website

2. Click 'Next'

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?

The screenshot displays the Salesforce Flow Builder interface for a 'New Account Screen Flow'. The browser address bar shows the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000AwLGAA0`. The interface includes a 'Toolbox' on the left with categories: Elements, Manager, Interaction (3), Logic (4), and Data (4). The 'Elements' category is expanded, showing 'Screen', 'Action', and 'Subflow' under Interaction; 'Assignment', 'Decision', 'Loop', and 'Collection Sort' under Logic; and 'Create Records', 'Update Records', 'Get Records', and 'Delete Records' under Data. The main canvas shows a flow diagram starting with a 'Start Screen Flow' element, followed by a 'Screen Account Form' element, then a 'Create Records Create Account Record' element, and finally a 'Screen Confirmation Screen' element. A red callout box points to the 'Screen Confirmation Screen' element with the text: '1. To remove the previous button, double click on 'Confirmation Screen' element'. The bottom of the interface has a 'Get more on the AppExchange' button.

Flow Builder Interface:

- Browser: All Accounts | Accounts | Sales x Flow Builder x New Account Screen Flow x +
- URL: asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000AwLGAA0
- User: Guest
- Flow Builder: New Account Screen Flow - V1
- Auto-Layout (Beta) [Toggle]
- Version 1: Inactive—Last modified 9 minutes ago
- Buttons: Run, Debug, Activate, Save As, Save
- Toolbox:
 - Elements
 - Manager
 - Interaction (3): Screen, Action, Subflow
 - Logic (4): Assignment, Decision, Loop, Collection Sort
 - Data (4): Create Records, Update Records, Get Records, Delete Records
- Flow Diagram:
 - Start Screen Flow
 - Screen Account Form
 - Create Records Create Account Record
 - Screen Confirmation Screen
- Callout: 1. To remove the previous button, double click on 'Confirmation Screen' element
- Bottom: Get more on the AppExchange

How To Create a Flow?

Flow Builder

New Account Screen Flow - V1

Auto-Layout (Beta) Version 1: Inactive—Last modified 10 minutes ago Run Debug Activate Save As Save

Toolbox

Elements

Interaction (3)

Screen

Action

Subflow

Logic (4)

Assignment

Decision

Loop

Collection

Data (4)

Create Record

Update Record

Get Record

Delete Records

Components

Fields (Beta)

Search components...

Input (36)

Address

Call Script

Cancel Appointment

Checkbox

Checkbox Group

Currency

Date

Date & Time

Get more on the AppExchange

New Account Screen Flow

Account "{!AccountName}" with URL "{!Website.value}" has been successfully created.

Finish

Screen Properties

Confirmation Screen (Confirmation_Screen)

This screen will be displayed to the user once the account record is successfully created

Configure Frame

Show Header

Show Footer

Control Navigation

Next or Finish

Previous

Pause

Cancel Done

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

```
graph TD; Start([Start Screen Flow]) --> Screen[Screen Account Form]; Screen --> CreateRecords[Create Records Create Account Record]; CreateRecords --> Confirmation[Screen Confirmation Screen];
```

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?



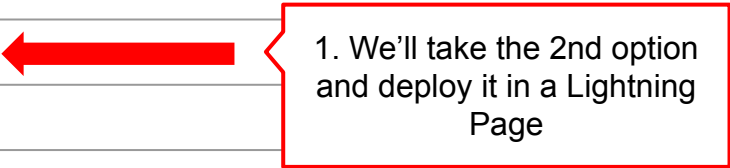
Testing the Flow



Granting Users Access to Run Flows

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



How to Deploy the Flow?

The screenshot shows the Salesforce Sales Console interface. At the top, there are browser tabs for 'Home | Salesforce' and a search bar. Below the navigation bar, the 'Home' tab is selected. A red box highlights the text: '1. Navigate to Home Tab in Sales Console App'. The main content area displays a 'Quarterly Performance' chart for 'As of Jul 1, 2021 9:25 PM'. The chart shows a line graph with a blue line representing 'Closed + Open (>70%)', an orange line for 'Closed', and a green line for 'Goal'. The y-axis ranges from 0 to 3.2M. Below the chart, there are sections for 'Today's Events' and 'Today's Tasks'. On the right side, there is an 'Assistant' panel with a message: 'Nothing needs your attention right now. Check back later.'

1. Navigate to Home Tab in Sales Console App

Quarterly Performance
CLOSED \$2,645,000
As of Jul 1, 2021 9:25 PM

3.2M
2.4M
1.6M
800k
0

Apr May Jun

■ Closed ■ Goal ■ Closed + Open (>70%)

Today's Events Today's Tasks

Assistant
Nothing needs your attention right now. Check back later.

How to Deploy the Flow?

1. Click on Gear icon and 'Edit Page'

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes the Salesforce logo, a search bar, and a 'Sales Console' tab. The main content area displays a 'Quarterly Performance' chart for the period 'As of Jul 1, 2021 9:25 PM'. The chart shows a line graph with a goal line and a legend indicating 'Closed', 'Goal', and 'Closed + Open (>70%)'. The right sidebar contains an 'Assistant' section with a message: 'Nothing needs your attention right now. Check back later.' A red box highlights the 'Edit Page' option in the 'Setup' menu.

Quarterly Performance

As of Jul 1, 2021 9:25 PM

CLOSED \$2,645,000 OPEN (>70%) \$665,000 GOAL --

3.2M
2.4M
1.6M
800k
0

Apr May Jun

Legend: Closed (orange), Goal (green), Closed + Open (>70%) (blue)

Today's Events

Today's Tasks

Assistant

Nothing needs your attention right now. Check back later.

Setup menu options: Setup, Service Setup, Developer Console, 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

The screenshot displays the Salesforce Lightning App Builder interface. On the left, a search bar contains the text 'Flow'. Below it, a list of components is shown under the 'Standard (2)' category, including 'Flow' and 'Paused Flow Interviews'. A red arrow points from the 'Flow' component in this list to the top right corner of the page editor. In the top right corner, a 'Flow' component is being added to the page. The page itself is titled 'Home Page Default' and contains several sections: 'Quarterly Performance' with a line chart, 'Today's Events', 'Today's Tasks', 'Recent Records', and 'Key Deals - Recent Opportunities'. On the right side of the interface, a 'Page' configuration panel is visible, showing fields for 'Label' (Home Page Default), 'Developer Name' (Home_Page_Default), 'Page Type' (Home Page), 'Template' (Standard Home Page), and 'Description'.

How to Deploy the Flow?

The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes the 'Lightning App Builder' tab and the 'Pages' dropdown menu. The main canvas displays a 'Quarterly Performance' chart and a 'Today's Tasks' section. A red box highlights the 'Flow' component in the 'Components' panel on the left. A red arrow points from the 'Flow' component to the 'New Account Screen Flow' in the 'Flow' component selection dropdown on the right. The dropdown also lists other flows like 'Inbound Cancel Appointment', 'Inbound Modify Appointment', 'Inbound New Appointment', 'Inbound New Guest Appointment', 'Outbound Modify Appointment', and 'Outbound New Appointment'.

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

How to Deploy the Flow?

The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes the 'Lightning App Builder' tab and a 'Pages' dropdown. The main canvas displays a 'Quarterly Performance' chart and a 'Today's Events' section. A red box highlights the 'Assistant' component, and a red arrow points to it from a callout box that says '1. We look all set. Save the page and return to App'. Another red box highlights the 'Save' button in the top right corner, with a callout box that says '2. Save the page'.

How to Deploy the Flow?

The screenshot shows the Salesforce Lightning App Builder interface. A modal dialog titled "Page Saved" is displayed in the center, with the following text:

Activate this page to make it visible to your users.

Activate the page now, or do it later using the Activation button in the App Builder toolbar.

At the bottom of the dialog, there is a checkbox labeled "Don't show this message again" and two buttons: "Not Yet" and "Activate". The "Activate" button is highlighted by a red box, and a red-bordered callout box with the text "1. Click on 'Activate' if prompted" points to it.

The background interface shows a sidebar with components like Accordion, App Launcher, Assistant, Chatter Feed, Chatter Publisher, Dashboard, Einstein Next Best Action, Flow, Items to Approve, Key Deals, Launchpad, List View, Paused Flow Interviews, and Performance. The main canvas displays a "Quarterly Performance" chart and a "Today's Events" section. The right sidebar shows the "Page > Flow" section with a "New Account Screen Flow" component and a "Layout" section with a "One Column" layout.

How to Deploy the Flow?

The screenshot shows the Salesforce Lightning App Builder interface. The browser address bar indicates the URL: `asagarwal-flows-dev-ed.lightning.force.com/visualEditor/appBuilder.app?id=0M05g000009PcXNCA0&retUrl=https%3A%2F%2Fasagarwal-flows-dev-ed.lightning.force.co...`. The user is logged in as 'Guest'.

The 'Activation: Home Page Default' dialog box is open, displaying the following information:

- Home pages can be assigned at different levels:**
 - The org default** home page is displayed unless more specific assignments are made.
 - The app default** home page is displayed for specified apps, and overrides the org default.
 - Any app and profile** assignments are displayed for specified app and profile combinations, and they override all other assignments.
- [More Info](#)
- ORG DEFAULT** (selected), APP DEFAULT, APP AND PROFILE
- Set this home page as the org default to display for all users unless other assignments apply.
- [Assign as Org Default](#) (highlighted with a red box and the instruction: 1. Click on 'Assign as Org Default')
- [Close](#)

How to Deploy the Flow?

The screenshot shows the Salesforce Lightning App Builder interface. A modal dialog titled "Set as Org Default: Home Page Default" is open. The dialog contains the text: "Set this Home page as the org default to display for all users unless other assignments apply." Below this is a table titled "Review Assignments (1)".

Current Default	Last Modified	New Default	Last Modified
System Default	-	Home Page Default	Ashish Agarwal Jul 6, 2021

At the bottom of the dialog are three buttons: "Cancel", "Back", and "Save". A red callout box with the text "1. Click 'Save'" points to the "Save" button.

How to Deploy the Flow?

1. Click on Back Arrow

The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes the 'Lightning App Builder' tab and a 'Pages' dropdown menu. The main canvas displays a dashboard layout with several components: 'Quarterly Performance' (a line chart showing sales data), 'Today's Events' (a calendar view), 'Today's Tasks' (a task list), and 'Recent Records' (a list of recent records). A red box highlights the 'Back Arrow' button in the top left corner of the canvas. The right sidebar contains a 'Page' section with a 'Flow Component' placeholder and a 'Layout' section with a 'One Column' layout selected. The bottom of the interface shows a 'Get more on the AppExchange' button.

How to Deploy the Flow?

The screenshot shows the Salesforce Home page. At the top, there's a navigation bar with 'Sales Console' and 'Home' tabs. Below this, the 'Quarterly Performance' section displays a line chart for 'Closed' and 'Goal' metrics from April to June. A red box highlights the 'New Account Screen Flow' section, which contains a form for entering account details. The form has fields for 'Account Name' (filled with 'Bedrock Enterprises') and 'Website' (filled with 'https://www.bedrock.com'). A 'Next' button is visible at the bottom right of the form. Below the form, there's an 'Assistant' section with a message: 'Nothing needs your attention right now. Check back later.'

1. This is how the Flow appears on the home page. Nice & neat. Let's enter an Account name and website and click on Next

How to Deploy the Flow?

The screenshot displays the Salesforce Sales Console interface. The top navigation bar includes the Salesforce logo, a search bar, and a user profile labeled 'Guest'. The main content area is divided into several sections:

- Quarterly Performance:** A line chart showing performance from April to June. The chart includes a blue line for 'Closed + Open (>70%)', an orange horizontal line for 'Closed', and a green horizontal line for 'Goal'. The y-axis ranges from 0 to 3.2M. The x-axis shows months: Apr, May, and Jun. A legend at the bottom identifies the lines: Closed (orange), Goal (green), and Closed + Open (>70%) (blue).
- New Account Screen Flow:** A confirmation message stating: "Account 'Bedrock Enterprises' with URL 'https://www.bedrock.com' has been successfully created." Below the message is a blue 'Finish' button.
- Assistant:** A section with the heading 'Assistant' and a sub-heading 'Nothing need'.
- Today's Events:** A section with the heading 'Today's Events'.
- Today's Tasks:** A section with the heading 'Today's Tasks'.

A red box highlights the 'Finish' button in the 'New Account Screen Flow' section, with a text overlay stating: "1. Once created, users are going to see the confirmation message then and there only. Clicking on 'Finish' will bring user back to the main screen."

How to Deploy the Flow?

The screenshot displays the Salesforce Sales Console interface. The top navigation bar includes the Salesforce logo, a search bar, and user profile information. The main content area is divided into several sections: Quarterly Performance, New Account Screen Flow, Assistant, Today's Events, and Today's Tasks. A navigation menu is open, showing options like Home, Leads, Accounts, Contacts, Opportunities, Campaigns, Tasks, Calendar, and Reports. A red callout box highlights the 'Accounts' tab with the text: "1. To verify that the record has been created, navigate to Accounts tab".

Quarterly Performance

CLOSED \$2,645,000 OPEN (>70%)

As of Jul 1, 2021 9:25 PM

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

New Account Screen Flow

Please enter the Account details.

* Account Name

Website

Next

Assistant

Nothing needs your attention right now. Check back later.

Today's Events

Today's Tasks

https://asagarwal-flows-dev-ed.lightning.force.com/lightning/o/Account/home

How to Deploy the Flow?

The screenshot shows the Salesforce 'Accounts' list page. The 'Recently Viewed' filter is selected, displaying a list of 4 accounts. The first three accounts are highlighted with a red box:

	Account Name	Account Site	Phone	Account Owner Alias
1	<input type="checkbox"/> Bedrock Enterprises			AAgar
2	<input type="checkbox"/> Globex Corporation			AAgar
3	<input type="checkbox"/> ASAGARWAL.COM PTE. LTD.			AAgar
4	<input type="checkbox"/> Burlington Textiles Corp of America		(336) 222-7000	AAgar

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

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

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

Flow Definitions
All Flows
18 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label ↑	Process Type	Ac...	Te...	Package State	Pa...	Last Modi...	Last Modifie...
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create a Case	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Order Summary Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Process Exception Flow	Autolaunched Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Discount Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Inbound Cancel Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
New Account Screen Flow	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Outbound Modify Appointment	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

Working with More Flow Elements

The screenshot shows the Salesforce Flow Builder interface. The browser address bar displays the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000AwLkAAK`. The page title is "New Account Screen Flow - V1". The interface includes a "Toolbox" on the left with "Elements" and "Manager" tabs. The "Elements" tab is active, showing a search bar and a list of resources: "Screen Components (4)" (AccountName, ConfirmationMessage, DisplayMessage, Website) and "Variables (2)" (AccountId from Create_Account_Re..., SendEmail). The "ELEMENTS" section lists "Create Records (1)" (Create_Account_Record) and "Screens (2)" (Account_Form, Confirmation_Screen). The main canvas displays a flow diagram: a "Start Screen Flow" element leads to a "Screen Account Form" element, which leads to a "Create Records Create Account Record" element. An arrow from the "Create Records" element points to a "Screen Confirmation Screen" element. A red box highlights the "Confirmation Screen" element with the text: "1. Double click on 'Confirmation Screen'".

Once the Account record is created, we want to ask the user if she/he wants to send a notification email. Let's add that option to our confirmation screen

Working with More Flow Elements

1. Search for Toggle component and drag it onto canvas

2. Specify the API Name and label of the component

Working with More Flow Elements

The screenshot shows the Salesforce Flow Builder interface with the 'Edit Screen' dialog open for a 'Toggle' component. The dialog is titled 'Edit Screen' and contains a preview of the screen content and a configuration panel on the right.

Preview Content:

New Account Screen Flow

Account "{!AccountName}" with URL "{!WebSiteURL}" has been successfully created.

Send Email Notification? ☐ No

Configuration Panel:

- Toggle**
- API Name:** SendEmail
- Label:** Send Email Notification?
- Active Label:** Yes
- Disabled:** Enter value or search resources...
- Inactive Label:** No
- Value:**

A red arrow points from the 'No' label in the preview to the 'Inactive Label' field in the configuration panel. A red box highlights the 'Active Label' and 'Inactive Label' fields with the instruction: 1. Specify the value for Active & Inactive label

Working with More Flow Elements

1. Drag and drop the email component to Canvas

Flow Builder: New Account Screen Flow - V1

Auto-Layout (Beta) Version 1: Active—Last modified 5 days ago Run Debug Deactivate Save As Save

Edit Screen

Components Fields (Beta)

Search: Email

Input (1)

- Email

Get more on the AppExchange

New Account Screen Flow

Account "{!AccountName}" with URL "{!WebSiteURL}" has been successfully created.

Send Email Notification? ☐ No

Finish

Toggle

Active Label: Yes

Disabled: Enter value or search resources...

Inactive Label: No

Value: Enter value or search resources...

> Set Component Visibility

> Advanced

Cancel Done

Working with More Flow Elements

The screenshot shows the Salesforce Flow Builder interface. The main window displays the 'New Account Screen Flow' with a success message: 'Account "{!AccountName}" with URL "{!Website.value}" has been successfully created.' Below this message is a toggle for 'Send Email Notification?' set to 'No', and an 'Email' button. A text input field for 'Email' contains 'you@example.com'. A 'Finish' button is at the bottom right of the screen.

On the left, the 'Toolbox' is visible with categories: Interaction (3), Logic (4), and Data (4). The 'Elements' panel shows 'Components' and 'Fields (Beta)' tabs. The 'Components' tab lists 'Email' under 'Input (1)'. The 'Fields (Beta)' tab lists 'Email' under 'Email'.

A red box highlights the 'Email' field in the 'Fields (Beta)' tab with the text: '1. Enter the API Name & Label for the Field. Scroll down'.

Working with More Flow Elements

Edit Screen

Components Fields (Beta)

Search: Email

Input (1)

- Email

New Account Screen Flow

Account "{!AccountName}" with URL "{!Website.value}" has been successfully created.

Send Email Notification? ☐ No ☒ Email

Email

you@example.com

Set Component Visibility

When to Display Component

- All Conditions Are Met (AND) (selected)
- Always
- ✓ All Conditions Are Met (AND)
- Any Condition Is Met (OR)
- Custom Condition Logic Is Met

1. Under 'Set Component Visibility' section, select the condition to 'All Conditions Are Met (AND)'

We'll set the email field to be visible only when the user chooses the option to send email notification

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

Components Fields (Beta)

Search: Email

Input (1)

- Email

New Account Screen Flow

Account "{AccountName}" with URL "{Website.value}" has been successfully created.

Send Email Notification? ☐ No ☒ Email

Email

you@example.com

Finish

Email

{!\$GlobalConstant.False}

Required

{!\$GlobalConstant.False}

Value

Enter value or search resources...

Set Component Visibility

When to Display Component

All Conditions Are Met (AND)

{!SendEmail.value} Equals
{!\$GlobalConstant.True}

Cancel Done

1. 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

The screenshot shows the Salesforce Flow Builder interface. The browser address bar indicates the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowDefId=3005g000000QBaf&flowId=3015g000000AwLkAAK&sfdcIFrameOrigin...`. The page title is "New Account Screen Flow - V1". The interface includes a "Toolbox" on the left with "Elements" and "Manager" tabs. Under "Elements", the "Interaction" section is expanded, showing "Decision", "Loop", and "Collection Sort". A red box highlights the "Decision" element with the text: "1. Click on 'Decision' Element & drag it on the Canvas". The flow diagram on the canvas shows a sequence: "Start Screen Flow" (green play button) → "Screen Account Form" (blue monitor icon) → "Create Records Create Account Record" (pink plus icon) → "Screen Confirmation Screen" (blue monitor icon). A red arrow points from the "Decision" element in the toolbox to the canvas, indicating where to add it. At the bottom right, a yellow box contains the text: "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".

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

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

5. Click on 'Default Outcome'

New Decision

*** Label**
Send Email?

*** API Name**
Send_Email

Description
Check if the user has selected to send an email notification and has specified an email address

Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER +

OUTCOME DETAILS

*** Label**
Yes

*** Outcome API Name**
Yes

Condition Requirements to Execute Outcome
All Conditions Are Met (AND)

Resource
SendEmail > Value

Operator
Equals

Value
True

AND

Resource
Email > Value

Operator
Is Null

Value
False

Working with More Flow Elements

The screenshot shows the Salesforce Flow Builder interface. The 'New Decision' dialog box is open, displaying the following fields:

- Label:** Send Email?
- API Name:** Send_Email
- Description:** Check if the user has selected to send an email notification and has specified an email address
- Outcomes:** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

The 'OUTCOME ORDER' section shows two outcomes: 'Yes' and 'No'. The 'No' outcome is highlighted with a red box and a callout that reads:

1. For Default Outcome, enter the label as 'No'. This outcome will be executed, when none of the preceding outcome conditions are met

The 'OUTCOME DETAILS' section for the 'No' outcome shows the label 'No' entered in the field. A red box highlights the 'Done' button at the bottom right of the dialog, with a callout that reads:

2. Click Done

Working with More Flow Elements

The screenshot displays the Salesforce Flow Builder interface. The browser tabs at the top include 'Home | Salesforce', 'Lightning App Builder | Salesforce', and 'Flow Builder'. The address bar shows the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowDefId=3005g000000QBaf&flowId=3015g000000AwLkAAK&sfdcclFrameOrigin=...`. The page title is 'New Account Screen Flow - V1'. The interface includes a 'Toolbox' on the left with categories: 'Elements' (selected) and 'Manager'. Under 'Elements', there are sections for 'Interaction (3)' (Screen, Action, Subflow), 'Logic (4)' (Assignment, Decision, Loop, Collection Sort), and 'Data (4)' (Create Records, Update Records, Get Records, Delete Records). The main canvas shows a flow diagram with the following elements: 'Start Screen Flow' (green play button), 'Screen Account Form' (blue screen icon), 'Create Records Create Account Record' (pink plus icon), 'Screen Confirmation Screen' (blue screen icon), and 'Decision Send Email?' (orange diamond icon). A red callout box with a white border contains the text: '1. Connect the 'Decision' element to the previous screen element'. The flow connects 'Start Screen Flow' to 'Screen Account Form', which then connects to 'Create Records Create Account Record'. From there, the flow continues to 'Screen Confirmation Screen', which finally connects to 'Decision Send Email?'. At the bottom left, there is a button that says 'Get more on the AppExchange'.

Flow Builder Interface:

- Toolbox: Elements, Manager
- Interaction (3): Screen, Action, Subflow
- Logic (4): Assignment, Decision, Loop, Collection Sort
- Data (4): Create Records, Update Records, Get Records, Delete Records

Flow Diagram:

```
graph TD; Start([Start Screen Flow]) --> Screen1[Screen Account Form]; Screen1 --> CreateRecords[Create Records Create Account Record]; CreateRecords --> Screen2[Screen Confirmation Screen]; Screen2 --> Decision{Decision Send Email?};
```

1. Connect the 'Decision' element to the previous screen element

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'

The screenshot shows the Salesforce Flow Builder interface. The top navigation bar includes the 'Manager' tab, which is selected. A red box highlights the 'New Resource' button in the 'Manager' tab. The flow diagram on the right shows a sequence of steps: 'Start Screen Flow' (green play button), 'Screen Account Form' (blue screen icon), 'Create Records Create Account Record' (pink record icon), 'Screen Confirmation Screen' (blue screen icon), and 'Decision Send Email?' (orange decision diamond). The left sidebar shows the 'Elements' panel with the 'Manager' tab selected. The 'New Resource' button is highlighted in the 'Manager' tab. The 'Resources' section lists various elements like 'Decision Outcomes (1)', 'Screen Components (6)', 'Variables (1)', and 'Create Records (1)'. The 'Elements' section shows 'Create Records (1)' and 'javascript:void(0) nt_Record'.

Now let's learn how to create resource explicitly

Working with More Flow Elements

The screenshot shows the Salesforce Flow Builder interface. The browser address bar displays the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000AwLkAAK`. The page title is "New Account Screen Flow - V1". The interface includes a "Toolbox" on the left with "Elements" and "Manager" tabs. The "Manager" tab is active, showing a search bar and a "New Resource" button. Below the search bar, there are sections for "RESOURCES" and "ELEMENTS". The "RESOURCES" section lists "Screen Components (4)" and "Variables (1)". The "ELEMENTS" section lists "Create Records (1)" and "Screens (2)". A "New Resource" dialog box is open in the center, displaying a list of resource types: Variable, Constant, Formula, Text Template, Choice, Record Choice Set, Picklist Choice Set, and Stage. The "Text Template" option is highlighted. A red callout box points to the "Text Template" option with the text: "1. There are different resource types available in Flow. Let's start with 'Text Template' resource type".

Working with More Flow Elements

1. Select the Resource Type as 'Text Template'

2. Specify the API Name & Description

New Resource

* Resource Type
Text Template

* API Name
EmailBody

Description
Resource to store the email body

* Body ⓘ
Insert a resource... View as Rich Text

Salesforce Sans 12 B I U

Cancel Done

Working with More Flow Elements

The screenshot shows the Salesforce Flow Builder interface. A 'New Resource' dialog box is open, allowing the user to create a new resource. The dialog has the following fields and options:

- Resource Type:** A dropdown menu currently set to 'Text Template'.
- API Name:** A text field containing 'EmailBody'.
- Description:** A text field containing 'Resource to store the email body'.
- Body:** A section for defining the resource's content. It includes a search bar 'Insert a resource...', a 'View as Plain Text' dropdown, and a text area containing:
A New Account has been created with the following details.
Name: {!AccountName}
Website: {!Website.value}

Three red callout boxes with white text provide instructions:

1. Select 'View as Plain Text' (pointing to the dropdown in the Body section).
2. Let's just create a simple email body with static text, line break and merge fields. (pointing to the text area in the Body section).
3. Click Done (pointing to the 'Done' button at the bottom right of the dialog).

The background shows the Flow Builder interface with a sidebar containing 'Toolbox', 'Elements', and 'Resources' sections. The main area displays the 'New Account Screen Flow - V1'.

Working with More Flow Elements

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

The screenshot displays the Salesforce Flow Builder interface. The top navigation bar shows the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowDefId=3005g000000QBaf&flowId=3015g000000AwLkAAK&sfdcclFrameOrigin=...`. The flow is titled "New Account Screen Flow - V1". The left sidebar contains a list of flow elements: "Action" (highlighted with a red box), "Subflow", "Logic (4)" (including Assignment, Decision, Loop, and Collection Sort), and "Data (4)" (including Create Records, Update Records, Get Records, and Delete Records). The main canvas shows a flow diagram with the following steps: "Start Screen Flow" (green play button), "Screen Account Form" (blue monitor icon), "Create Records Create Account Record" (pink document icon with a plus), "Screen Confirmation Screen" (blue monitor icon), and "Decision Send Email?" (orange diamond icon). A red arrow points from the "Action" element in the sidebar to the "Decision Send Email?" step in the flow diagram.

Auto-Layout (Beta) ☐ Version 1: Active—Last modified 5 days ago Run Debug Deactivate Save As Save

Start Screen Flow

Screen Account Form

Create Records Create Account Record

Screen Confirmation Screen

Decision Send Email?

Get more on the AppExchange

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

The screenshot shows the 'New Action' dialog in the Salesforce Flow Builder. The 'Filter By' dropdown is set to 'Category'. A list of categories is shown, including 'All', 'Users', 'Group', 'Appointments', 'Task', 'Feed Item', 'Order Management', 'Chatbots', 'Case', 'Account', and 'Contact'. The 'All' category is selected. The main area shows a search bar and a list of actions, with a placeholder image and text: 'Lights, camera, action! Select an action to configure.' The 'Cancel' and 'Done' buttons are at the bottom right.

Working with More Flow Elements

The screenshot shows the Salesforce Flow Builder interface. On the left, the 'Toolbox' panel is visible with categories like Interaction, Logic, and Data. A search box is open, and the text 'Email' is entered. Below the search box, a list of results is shown, with 'Send Email' (emailSimple-emailSimple) highlighted. A red callout box points to the search box with the text: '1. Type 'Email' in the search box and click 'Send Email''. The background shows the flow canvas with a 'New Account Screen Flow - V1' and various flow elements like 'Screen', 'Action', 'Subflow', 'Assignment', 'Decision', 'Loop', 'Collection Sort', 'Create Records', 'Update Records', 'Get Records', and 'Delete Records'.

1. Type 'Email' in the search box and click 'Send Email'

Search results:

- Send Email
emailSimple-emailSimple

Light, camera, action!
Select an action to configure.

Cancel Done

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

The screenshot shows the Salesforce Flow Builder interface. The browser tabs at the top are 'Home | Salesforce', 'Lightning App Builder | Salesforce', and 'Flow Builder'. The URL bar shows 'asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowDefId=3005g000000Q0Baf&flowId=3015g000000AwLkAAK&sfdcIFrameOrigin...'. The page title is 'New Account Screen Flow - V1'. The left sidebar shows the 'Toolbox' with 'Elements' and 'Manager' tabs. Under 'Elements', there are categories: 'Interaction (3)' (Screen, Action, Subflow), 'Logic (4)' (Assignment, Decision, Loop, Collection Sort), and 'Data (4)' (Create Records, Update Records, Get Records, Delete Records). The main area shows a configuration panel for an 'Email' element. A red box highlights the first step: '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'. A red arrow points from this box to the 'Include' toggle switch for the 'Email Addresses (comma-separated)' field, which contains the merge field '{!Email.value}'. Other fields like 'Rich-Text-Formatted Body', 'Sender Address', and 'Sender Type' are also visible, each with a 'Don't include' toggle. At the bottom right, a red box highlights the second step: '2. Click Done', with an arrow pointing to the 'Done' button.

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

The screenshot shows the Salesforce Flow Builder interface. The browser tabs include 'Home | Salesforce', 'Lightning App Builder | Salesforce', and 'Flow Builder'. The URL is 'asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowDefId=3005g000000QBaf&flowId=3015g000000AwLkAAK&sfdcIFrameOrigin...'. The page title is 'New Account Screen Flow - V1'. The interface includes a 'Toolbox' on the left with 'Elements' and 'Manager' tabs. The 'Elements' tab is active, showing categories: Interaction (3), Logic (4), and Data (4). The 'Interaction' category is expanded, showing 'Screen', 'Action', and 'Subflow'. The 'Logic' category is expanded, showing 'Assignment', 'Decision', 'Loop', and 'Collection Sort'. The 'Data' category is expanded, showing 'Create Records', 'Update Records', 'Get Records', and 'Delete Records'. The main canvas displays a flow diagram with the following elements and connections:

- Start** (Screen Flow) connects to **Screen** (Account Form).
- Screen** (Account Form) connects to **Create Records** (Create Account Record).
- Create Records** (Create Account Record) connects to **Screen** (Confirmation Screen).
- Screen** (Confirmation Screen) connects to **Decision** (Send Email?).
- Decision** (Send Email?) connects to **Action** (Send Email Notification).

A red box highlights the instruction: "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'

The screenshot displays the Salesforce Flow Builder interface for a flow named "New Account Screen Flow - V1". The interface includes a "Toolbox" on the left with categories "Interaction (3)" (Screen, Action, Subflow) and "Logic (4)". The main canvas shows a flow diagram with elements: "Start Screen Flow", "Screen Confirmation Screen", "Decision Send Email?", and "Action Send Email Notification". A modal dialog titled "Select outcome for decision connector" is open, asking "To go to the 'Send Email Notification' element, which outcome's conditions must be met?". The dialog has an "Outcome" dropdown menu with "Yes" selected and a "Done" button. The flow diagram shows a path from the "Screen Confirmation Screen" to the "Decision Send Email?" element, which then leads to the "Action Send Email Notification" element.

Working with More Flow Elements

Flow Builder Interface: New Account Screen Flow - V1

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?

Flow Diagram:

- Start Screen Flow
- Screen Account Form
- Create Records Create Account Record
- Screen Confirmation Screen
- Decision Send Email?
- Action Send Email Notification

Toolbox:

- Interaction (3)
 - Screen
 - Action
 - Subflow
- Logic (4)
 - Assignment
 - Decision
 - Loop
 - Collection Sort
- Data (4)
 - Create Records
 - Update Records
 - Get Records
 - Delete Records

Working with More Flow Elements

Home | Salesforce | Lightning App Builder | Salesforce | Flow Builder

asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowDefId=3005g000000Q0Baf&flowId=3015g000000AwLkAAK&sfdcIFrameOrigin... Guest

Flow Builder New Account Screen Flow - V1

Auto-Layout (Beta) Version 1: Active—Last modified 7 days ago Run Debug Deactivate Save As Save

Toolbox

Elements Manager

- Interaction (3)
 - Screen
 - Action
 - Subflow
- Logic (4)
 - Assignment
 - Decision
 - Loop
 - Collection Sort
- Data (4)
 - Create Records
 - Update Records
 - Get Records
 - Delete Records

Get more on the AppExchange

Start Screen Flow

Screen Account Form

Create Records Create Account Record

Screen Confirmation Screen

Decision Send Email?

Action Send Email Notification

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.

The flow diagram shows the following steps:

- Start (Screen)
- Create Records (Create Account Record)
- Confirmation Screen
- Decision (Send Email?)
- Action (Send Email Notification)

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

How To Debug the Flow?

The screenshot displays the Salesforce Flow Builder interface. The browser tabs show 'Home | Salesforce', 'Lightning App Builder | Salesforce', and 'Flow Builder'. The URL is 'asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000B8TDA0'. The page title is 'New Account Screen Flow - V2'. The interface includes a 'Toolbox' on the left with categories: Elements (Interaction, Logic, Data), Manager, and a 'Get more on the AppExchange' button. The main canvas shows a flow diagram with the following steps: Start Screen Flow, Screen Account Form, Create Records Create Account Record, Screen Confirmation Screen, Decision Send Email?, and Action Send Email Notification. A red box highlights the 'Debug' button in the top right corner of the interface. A text box with a red border contains the following text:

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?

The screenshot shows the Salesforce Flow Builder interface. The browser tabs include 'Home | Salesforce', 'Lightning App Builder | Salesforce', 'Flow Builder', and 'New Account Screen Flow'. The URL bar shows a debug URL. The 'Debug flow' dialog box is open, displaying the following options:

Debug Options

- ☒ Run the latest version of each flow called by subflow elements
- ☒ Show details of what's executed and render flow in Lightning runtime ⓘ
- ☐ Run flow as another user ⓘ

Input Variables

This flow has no variables that allow input access, or all its input variables are collection variables, which aren't supported for input when debugging.

Run

1. Note the options when debugging the Flow. For now, leave these settings as-is and click on Run

How To Debug the Flow?

The screenshot displays the Salesforce Flow Builder interface for a flow named 'New Account Screen Flow'. The browser address bar shows the URL: `asagarwal-flows-dev-ed--c.visualforce.com/flow/runtime.apexp?flow__debug=true&flowVersionId=3015g000000B8TD&flowDevName=New_Account_Screen_Flow&debugl...`. The flow is in debug mode, as indicated by the 'Run Again' button and the 'Debug Details' panel on the right.

New Account Screen Flow

Please enter the Account details.

* Account Name

Website

Next

Debug Details

How the Interview Started
Ashish Agarwal (0055g00000A0VRW) started the flow interview.
API Version for Running the Flow: 52

Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.

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?

The screenshot shows the Salesforce Flow Builder interface for a flow named 'New Account Screen Flow'. The flow is in debug mode, and the current step is 'Please enter the Account details'. The 'Account Name' field is filled with 'Opentech Inc.' and the 'Website' field is filled with 'https://www.opentech.com'. A red box highlights the 'Next' button, and a red arrow points to it from a text box. The 'Debug Details' panel on the right shows the following information:

- How the Interview Started**
Ashish Agarwal (0055g00000A0VRW) started the flow interview.
API Version for Running the Flow: 52
- Transaction Committed**
Any records that the flow was ready to create, update, or delete were committed to the database.

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

How To Debug the Flow?

The screenshot shows the Salesforce Flow Builder interface. The main canvas displays a 'New Account Screen Flow' with a success message: 'Account "Opentech Inc." with URL "https://www.opentech.com" has been successfully created.' Below this is a toggle for 'Send Email Notification?' set to 'No'. A 'Next' button is visible at the bottom right of the canvas.

On the right side, the 'Debug Details' panel is open, showing the state of the flow at runtime. It includes the following information:

- SCREEN:** Account_Form
Display Text: DisplayMessage
Value at run time: Please enter the Account details.
- Textbox:** AccountName
Label: Account Name
Value at run time: Opentech Inc.
- Lightning Component:** Website
Screen component: flowruntime:url
Inputs: label = (Website)
Outputs: disabled = false, label = Website, readonly = false, required = false, value = https://www.opentech.com
- Selected Navigation Button:** NEXT
- CREATE RECORDS:** Create_Account_Record
Create one Account record where:
Name = {!AccountName} (Opentech Inc.)
Website = {!Website.value} (https://www.opentech.com)
- Result:** A record is ready to be created when the next screen, pause, or local action is executed or when

Two red boxes with arrows pointing to the Debug Details panel contain the following instructions:

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?

The screenshot shows the Salesforce Lightning App Builder interface. The browser tabs include 'Recently Viewed | Accounts', 'Lightning App Builder | Salesfo', 'Flow Builder', and 'New Account Screen Flow'. The URL is 'asagarwal-flows-dev-ed.lightning.force.com/lightning/o/Account/list?filterName=Recent'. The 'Sales Console' is open, and the 'Accounts' tab is selected. The 'Accounts' list shows 5 items, updated a minute ago. The list includes columns for 'Account Name' and 'Account Owner Alias'. A red callout box points to the first item in the list, 'Opentech Inc.', with the text: '1. If you navigate to the first browser tab and go to 'Accounts', you will notice that the account has already been created.'

	Account Name	Account Owner Alias
1	<input type="checkbox"/> Opentech Inc.	AAgar
2	<input type="checkbox"/> Bedrock Enterprises	AAgar
3	<input type="checkbox"/> Globex Corporation	AAgar
4	<input type="checkbox"/> ASAGARWAL.COM PTE. LTD.	AAgar
5	<input type="checkbox"/> Burlington Textiles Corp of America	AAgar

How To Debug the Flow?

Recently Viewed | Accounts | Lightning App Builder | Salesfo | Flow Builder | New Account Screen Flow

asagarwal-flows-dev-ed--c.visualforce.com/flow/runtime.apexp?flow__debug=true&flowVersionId=3015g00000B8TD&flowDevName=New_Account_Screen_Flow&debugl... Guest

Run Again

New Account Screen Flow

Account "Opentech Inc." with URL "https://www.opentech.com"

Send Email Notification? ☐ No

Next

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'

Debug Details

value at runtime: Opentech Inc.

Lightning Component: Website
Screen component: flowruntime:url

Inputs:
label = (Website)

Outputs:
disabled = false
label = Website
readonly = false
required = false
value = https://www.opentech.com

Selected Navigation Button: NEXT

CREATE RECORDS: Create_Account_Record
Create one Account record where:
Name = {!AccountName} (Opentech Inc.)
Website = {!Website.value}
(https://www.opentech.com)

Result
A record is ready to be created when the next screen, pause, or local action is executed or when the interview finishes.
0015g00000JWJxyAAH

Transaction Committed
Any records that the flow was ready to create, update, or delete were committed to the database.

How To Debug the Flow?

The screenshot shows the Salesforce Flow Builder interface. The main panel displays the 'New Account Screen Flow' with a success message: 'Account "Opentech Inc." with URL "https://www.opentech.com" has been successfully created.' Below this, there is a 'Send Email Notification?' toggle switch set to 'Yes' and an 'Email' input field containing 'ashish@asagarwal.com'. A red box highlights the 'Send Email Notification?' toggle and the 'Email' field, with a red arrow pointing to the 'Next' button. The right panel shows 'Debug Details' for the current flow run, including the Lightning Component, Screen component, Inputs, Outputs, and a 'CREATE RECORDS' section with a 'Result'.

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?

The screenshot shows the Salesforce Flow Builder interface. The browser tab is 'New Account Screen Flow'. The URL is 'asagarwal-flows-dev-ed--c.visualforce.com/flow/runtime.apexp?flow__debug=true&flowVersionId=3015g000000B8TD&flowDevName=New_Account_Screen_Flow&debugl...'. The user is 'Guest'. The flow status is 'All done' with the message 'The flow interview finished at Jul 13, 2021, 4:30:50 PM'. There are 'Change Inputs' and 'Run Again' buttons. A red box highlights the first step of the debug process. The 'Debug Details' panel on the right shows the 'SCREEN: Confirmation_Screen' and 'Lightning Component: SendEmail' details.

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.

SCREEN: Confirmation_Screen
Display Text: ConfirmationMessage
Value at run time:
Account "Opentech Inc." with URL "https://www.opentech.com" has been successfully created.

Lightning Component: SendEmail
Screen component: flowruntime:toggle
Inputs:
label = (Send Email Notification?)
messageToggleActive = (Yes)
messageToggleInactive = (No)
Outputs:
label = Send Email Notification?
messageToggleActive = Yes
messageToggleInactive = No
value = true

Lightning Component: Email
Screen component: flowruntime:email
Inputs:
Outputs:
disabled = false
label = Email
placeholder = you@example.com
readonly = false
required = false
value = ashish@asagarwal.com

How To Debug the Flow?

The screenshot shows the Salesforce Flow Builder interface. The top navigation bar includes tabs for 'Recently Viewed | Accounts', 'Lightning App Builder | Salesfo...', 'Flow Builder', and 'New Account Screen Flow'. The browser address bar shows the URL: `asagarwal-flows-dev-ed--c.visualforce.com/flow/runtime.apexp?flow__debug=true&flowVersionId=3015g000000B8TD&flowDevName=New_Account_Screen_Flow&debugl...`. A 'Run Again' button is visible in the top right.

The main content area displays the flow execution status: 'All done' and 'The flow interview finished at Jul 13, 2021, 4:30:50 PM'. A 'Change' button is located on the left.

Two red callout boxes highlight key information:

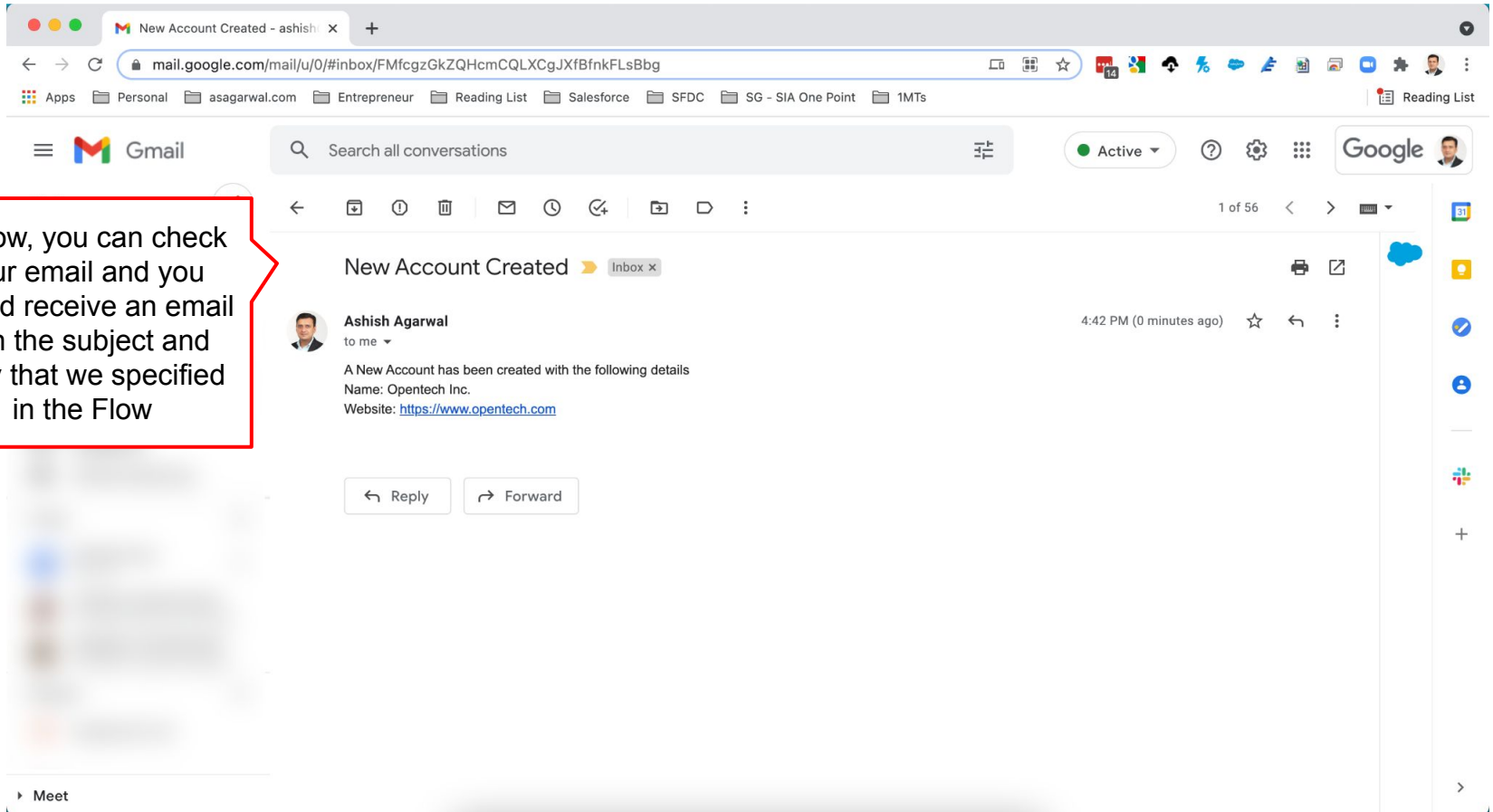
1. The 4th Element in the Flow is a Decision element. Note that Debug section is showing that the outcome executed was 'Yes' and also the values of the conditions in the outcome. Very intuitive.
2. And since the decision outcome was 'Yes', the 5th element 'Send Email Notification' was executed. Here you can see the Email Body, Email Subject and the Email Address to which this notification was sent.

The 'Debug Details' panel on the right provides the following information:

- Selected Navigation Button:** NEXT
- DECISION:** Send_Email
Outcome executed: Yes
Outcome conditions:
 - 1. `{!SendEmail.value} (true) Equals true`
 - 2. `{!Email.value} (ashish@asagarwal.com) Is null false`Logic: All conditions must be true (AND)
- SEND EMAIL:** Send_Email_Notification
Inputs:
 - `emailBody = {!EmailBody}` (A New Account has been created with the following details. Name: Opentech Inc. Website: `https://www.opentech.com`)
 - `emailAddresses = {!Email.value}` (`ashish@asagarwal.com`)
 - `emailSubject = New Account Created`**Outputs:** None.
- Transaction Committed**
Any records that the flow was ready to create, update, or delete were committed to the database.

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?

The screenshot displays the Salesforce Flow Builder interface. The top navigation bar shows the current flow is 'New Account Screen Flow - V2'. The left sidebar contains a 'Toolbox' with 'Elements' and 'Manager' tabs, and a 'Resources' section listing various components like 'Decision Outcomes', 'Formulas', 'Screen Components', 'Email', 'SendEmail', 'Website', and 'Variables'. The main canvas shows a flow diagram starting with a 'Start Screen Flow' node, followed by a 'Screen Account Form' node, then a 'Create Records Create Account Record' node, a 'Screen Confirmation Screen' node, a 'Decision Send Email?' node, and finally an 'Action Send Email Notification' node. A red box highlights the 'Activate' button in the top right corner of the interface.

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

The screenshot displays the Salesforce Flow Builder interface. At the top, the browser address bar shows the URL: `asagarwal-flows-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=3015g000000B8cAAAS`. The page title is "New Account Screen Flow - V2". The interface includes a top navigation bar with a back arrow, a "Flow Builder" tab, and a "New Account Screen Flow - V2" title. Below the navigation bar, there are buttons for "Auto-Layout (Beta)", "Version 2: Active—Last modified a few seconds ago", "Run", "Debug", "Deactivate", "Save As", and "Save".

The main workspace shows a flow diagram. The flow starts with a "Screen" component labeled "Account Form". This is followed by a "Create Records" component labeled "Create Account Record". The flow then proceeds to a "Screen" component labeled "Confirmation Screen". After the confirmation screen, there is a "Decision" component labeled "Send Email?". If the decision is "Yes", the flow proceeds to an "Action" component labeled "Send Email Notification".

On the left side, there is a sidebar with a search bar labeled "Search this flow...". Below the search bar is a "New Resource" button. The sidebar is divided into two sections: "RESOURCES" and "ELEMENTS". The "RESOURCES" section lists various components: "Decision Outcomes (1)" with "Yes", "Formulas (1)" with "EmailBody", and "Screen Components (6)" including "AccountName", "ConfirmationMessage", "DisplayMessage", "Email", "SendEmail", and "Website". The "ELEMENTS" section lists "Variables (1)" including "Accountid from Create_Account_Re...".

How To Debug the Flow?

The screenshot displays the Salesforce Flow Builder interface. The browser tabs show 'Recently Viewed | Accounts', 'Lightning App Builder | Salesforce', and 'Flows | Salesforce'. The address bar shows the URL: `asagarwal-flows-dev-ed.lightning.force.com/lightning/setup/Flows/page?address=%2F3005g000000QBaf`. The user is logged in as 'Guest'.

The left sidebar contains the 'Setup' menu with options like 'Setup Home', 'Service Setup Assistant', 'Multi-Factor Authentication Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'New Salesforce Mobile App QuickStart', 'Lightning Usage', 'Optimizer', and 'ADMINISTRATION'.

The main content area shows the 'New Account Screen Flow' details. The 'Flow Detail' section includes buttons for 'Edit', 'Open', 'Run', and 'Delete'. The flow is labeled 'New Account Screen Flow' and has the API name 'New_Account_Screen_Flow'. The description states: 'This is a screen flow to create a new Account record. In this version, the option to send email has been added.' The URL is '/flow/New_Account_Screen_Flow'. The flow was activated by 'Ashish Agarwal' on 7/13/2021 at 1:50 AM. The trigger is 'Activated/Deactivated By'. The flow was modified by 'Ashish Agarwal' on 7/13/2021 at 1:50 AM. The flow is a 'Screen Flow' with an 'Active Version' of 2. The template is 'False'. The flow was created by 'Ashish Agarwal' on 7/6/2021 at 2:22 AM.

The 'Flow Versions' section shows a table of flow versions:

Action	Flow Label	Version	Description	Built with	Created Date	Type	Status	Run in Mode	API Version for Running the Flow
Open Run Deactivate	New Account Screen Flow	2	This is a screen flow to create a new Account record. In this version, the option to send email has been added.	Flow Builder	7/13/2021, 1:47 AM	Screen Flow	Active	Default Mode	52.0
Open Run Del Activate	New Account Screen Flow	1	This is a screen flow to create a new Account record	Flow Builder	7/6/2021, 3:52 AM	Screen Flow	Inactive	Default Mode	52.0

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

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

Testing the Flow

The screenshot displays the Salesforce Lightning App Builder interface. The top navigation bar includes tabs for 'Home | Salesforce', 'Lightning App Builder | Salesforce', and 'Flow Builder'. The address bar shows the URL 'asagarwal-flows-dev-ed.lightning.force.com/lightning/page/home'. The main content area is divided into two sections. On the left, a dashboard titled 'Sales Console' shows a line chart for 'As of Jul 1, 2021 9:25 PM' with a legend for 'Closed', 'Goal', and 'Closed + Open (>70%)'. On the right, a 'New Account Screen Flow' form is displayed, prompting the user to enter account details. The form includes fields for 'Account Name' (filled with 'Zen Corporation') and 'Website' (filled with 'https://www.zencorporation.com'). A red box highlights the 'Next' button at the bottom right of the form. A red arrow points from the 'Next' button to the second instruction box.

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.

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

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

Next

Nothing needs your attention right now. Check back later.

Testing the Flow

The screenshot shows the Salesforce Lightning App Builder interface. The browser tabs include 'Home | Salesforce', 'Lightning App Builder | Salesforce', and 'Flow Builder'. The address bar shows the URL: asagarwal-flows-dev-ed.lightning.force.com/lightning/page/home. The 'Sales Console' is visible with a 'Home' tab selected. A navigation menu is open, showing options like Home, Leads, Accounts, Contacts, Opportunities, Campaigns, Tasks, Calendar, and Reports. The 'Accounts' tab is highlighted. A red box around the 'Accounts' tab contains the text: "2. To verify that the account was created, click on 'Accounts' tab". The main content area displays a 'Quarterly Performance' chart and a 'New Account Screen Flow' form. The form has fields for 'Account Name' and 'Website', and a 'Next' button. A red box around the 'Next' button contains the text: "1. Flow will bring you back to the 1st Screen." The bottom of the screen shows 'Today's Events' and 'Today's Tasks' sections.

Testing the Flow

The screenshot shows the Salesforce 'Accounts' list page. The browser tabs include 'Recently Viewed | Accounts', 'Lightning App Builder | Salesforce', and 'Flow Builder'. The URL is 'asagarwal-flows-dev-ed.lightning.force.com/lightning/o/Account/list?filterName=Recent'. The page header shows 'Sales Console' and 'Accounts'. The main content area is titled 'Accounts Recently Viewed' and shows a list of 6 items. A red callout box points to the first record, 'Zen Corporation', with the text: '1. You can see the record for Account that you just created through Flows. Let's check the email now'.

	Account Name	Account Owner Alias
1	Zen Corporation	AAgar
2	Opentech Inc.	AAgar
3	Bedrock Enterprises	AAgar
4	Globex Corporation	AAgar
5	ASAGARWAL.COM PTE. LTD.	AAgar
6	Burlington Textiles Corp of America	AAgar

Testing the Flow

The screenshot shows a Gmail interface with a browser window. The address bar displays the URL: `mail.google.com/mail/u/0/#inbox/FMfcgzGkZQHcmDXbcGwqtKHFchGkPpdB`. The Gmail header includes the search bar, 'Active' status, and the Google logo. The left sidebar shows the 'Inbox' with 5 emails. The main content area displays an email titled 'New Account Created' from 'Ashish Agarwal' to 'me'. The email body states: 'A New Account has been created with the following details: Name: Zen Corporation, Website: <https://www.zencorporation.com>'. Below the email body are 'Reply' and 'Forward' buttons. A red callout box on the left contains the text: '1. And you can also see the email notification'.

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

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

Name	Anna Parker	Role	
Alias	apark	User License	Salesforce
Email	anna@asagarwal.com	Profile	Standard User
Username	anna@asagarwal-flows.com	Active	<input checked="" type="checkbox"/>
Nickname	apark	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input checked="" type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+08:00) Singapore		
Locale	English (United Kingdom)		
Language	English		
Delegated Approver			
Manager	Ashish Agarwal		
Receive Approval Request Emails	Only if I am an approver		

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'

Q Login Access

Security

Login Access Policies

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

SETUP Login Access Policies

Login Access Policies

Help for this Page

Control which support organizations your users can grant login access to.

Manage Support Options

Save Cancel

Setting

Enabled

Administrators Can Log in as Any User



Support Organization

Packages

Available to Use

Salesforce.com Support



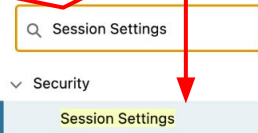
Save Cancel

2. Check the box for 'Administrators Can Login as Any User' and click 'Save'

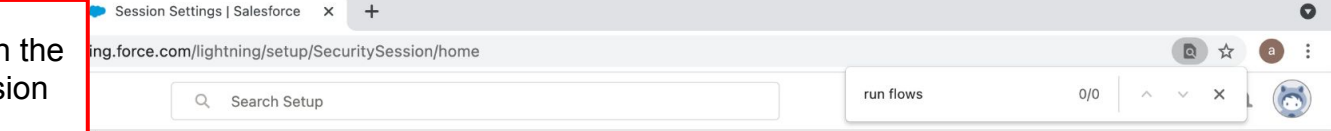
Enable the setting to allow you to login as any user.

Granting Users Access to Run Flows

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



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



Session Settings

Session Settings

Set the session security and session expiration timeout for your organization.

Session Timeout

Timeout Value

- ☐ Disable session timeout warning popup
- ☒ Force logout on session timeout

Session Settings

- ☐ Lock sessions to the IP address from which the user logged in
- ☒ Lock sessions to the domain in which the user logged in
- ☐ Force relogin after Login-As-User
- ☐ Require HttpOnly attribute
- ☐ Use POST requests for cross-domain sessions
- ☐ Enforce login IP ranges on every request

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

Extended use of IE11 with Lightning Experience

EXTENDED USE OF IE11 WITH LIGHTNING EXPERIENCE HAS NOW ENDED

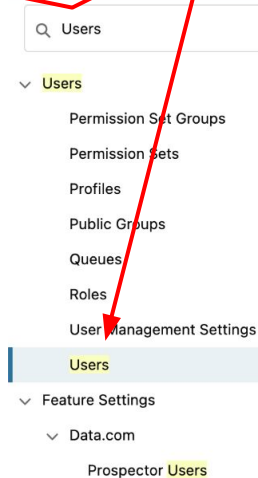
AS OF DECEMBER 31, THE EXTENDED PERIOD HAS ENDED, AND USE OF INTERNET EXPLORER 11 (IE 11) WITH LIGHTNING EXPERIENCE WILL NOT BE FIXED. PLEASE SWITCH TO A SUPPORTED BROWSER.

Caching

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

A screenshot of the Salesforce 'All Users' page. The page title is 'All Users'. Below the title, there is a description: 'On this page you can create, view, and manage users. In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)'. There is a 'View' dropdown set to 'All Users' and links for 'Edit' and 'Create New View'. Below this is a table of users. The table has columns: Action, Full Name, Alias, Username, Last Login, Role, Active, Profile, and Manager. The first user is 'Agarwal, Ashish' with alias 'AAGar' and username 'ashish@asagarwal-flows-dev-ed.com'. The second user is 'Chatter Expert' with alias 'Chatter' and username 'chatty.00d5g000005iapmeas.hvpbfwec8ukt@chatter.salesforce.com'. The third user is 'Parker, Anna' with alias 'apark' and username 'anna@asagarwal-flows.com'. The fourth user is 'User, Integration' with alias 'integ' and username 'integration@00d5g000005iapmeas.com'. The fifth user is 'User, Integration' with alias 'integ' and username 'integration@00d5g000005iapmeas.com'. The table also shows 'Last Login', 'Role', 'Active' status, 'Profile', and 'Manager' for each user. There are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users' at the top and bottom of the table.

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Agarwal, Ashish	AAGar	ashish@asagarwal-flows-dev-ed.com	8/7/2021, 3:41 AM	System Administrator	✓	System Administrator	
Edit	Chatter Expert	Chatter	chatty.00d5g000005iapmeas.hvpbfwec8ukt@chatter.salesforce.com		Chatter Free User	✓	Chatter Free User	
Edit Login	Parker, Anna	apark	anna@asagarwal-flows.com		Standard User	✓	Standard User	Agarwal, Ashish
Edit	User, Integration	integ	integration@00d5g000005iapmeas.com		Analytics Cloud Integration User	✓	Analytics Cloud Integration User	
Edit	User, Integration	integ	integration@00d5g000005iapmeas.com		Analytics Cloud Security User	✓	Analytics Cloud Security User	

Granting Users Access to Run Flows

1. Salesforce will log you as another user

2. Notice that the Flow component that we added on the Home screen is not visible. This is because we haven't given permission to this user to run Flows

Quarterly Performance

As of Today 3:29 PM

CLOSED \$0 OPEN (>70%) \$0 GOAL --

500k
400k
300k
200k
100k
0

Aug Sept Oct Nov

■ Closed ■ Goal ■ Closed + Open (>70%)

Add the opportunities you're working on, then come back here to view your performance.

Today's Events

Today's Tasks

Assistant

Nothing needs your attention right now. Check back later.

History

Granting Users Access to Run Flows

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

Logged in as Anna Parker (anna@asagarwal-flows.com) [Log out as Anna Parker](#)

Sales Console Home

Quarterly Performance

CLOSED \$0 OPEN (>70%) \$0 GOAL --

As of Today 3:29 PM

500k
400k
300k
200k
100k
0

Aug Sept Oct Nov

■ Closed ■ Goal ■ Closed + Open (>70%)

Add the opportunities you're working on, then come back here to view your performance.

Today's Events

Today's Tasks

History

Granting Users Access to Run Flows

The screenshot shows the Salesforce Setup page for Users. The left sidebar contains navigation links: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, and ADMINISTRATION. Under ADMINISTRATION, the 'Users' link is selected. The main content area is titled 'All Users' and includes a search bar and a 'Quick Find' box. Below the title, there is a description of the page and links for 'iOS' and 'Android'. A 'View' dropdown is set to 'All Users'. A table of users is displayed with columns: Action, Full Name, Alias, Username, Last Login, Role, Active, Profile, and Manager. The table contains four rows of user data. A red box highlights the 'Edit' link for the user 'Parker, Anna'.

1. Click on 'Edit' for the user

Action	Full Name	Alias	Username	Last Login	Role	Active	Profile	Manager
Edit	Agarwal, Ashish	A.Agar	ashish@asagarwal-flows-dev-ed.com	8/4/2021, 11:35 PM		✓	System Administrator	
Edit	Chatter Expert	Chatter	chatty.00d5g000005iapmeas.hvpbfwec8ukt@chatter.salesforce.com			✓	Chatter Free User	
Edit Login	Parker, Anna	apark	anna@asagarwal-flows.com			✓	Standard User	
	User, Integration	intgr	integration@00d5g000005iapmeas.com			✓	Analytics Cloud Integration User	
			tssecurity@00d5g000005iapmeas.com			✓	Analytics Cloud Security User	

Granting Users Access to Run Flows

The screenshot shows the Salesforce 'Users' page in the 'Setup' tab. The 'User Edit' form for 'Anna Parker' is displayed. The form includes fields for 'General Information' (First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, Division) and 'Permissions' (Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Contributor User, Publisher User, WDC User, Data.com User, Data.com Monthly Addition User, Accessibility Mode). The 'Flow User' checkbox is checked. A red arrow points to the 'Save' button. A yellow callout box contains the text: 'There are two ways to grant users access to run Flows. One is to check the box for 'Flow User' on user's record'.

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

The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with 'Profiles' selected under 'ADMINISTRATION'. The main content area shows the 'Custom: Sales Profile' page. A search bar at the top of the page has 'Run Flows' entered, and the 'Run Flows' option is highlighted in the search results. A red box with a white background and a red border contains the text: '1. Navigate to user's Profile, Type 'Run Flows' in the search box and click 'Run Flows' under System Permission'. A red arrow points from this box to the 'Run Flows' option in the search results. Below the search results, there is a table with columns 'Description', 'User License', and 'Salesforce'. The 'Run Flows' option is listed in the table. To the right of the table, there is a button labeled 'Assigned Users'. Below the table, there is a section titled 'Apps' with a list of permissions: 'Assigned Apps', 'Assigned Connected Apps', 'Object Settings', 'App Permissions', 'Apex Class Access', and 'Visualforce Page Access'. A yellow callout box on the right side of the screenshot contains the text: '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'.

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

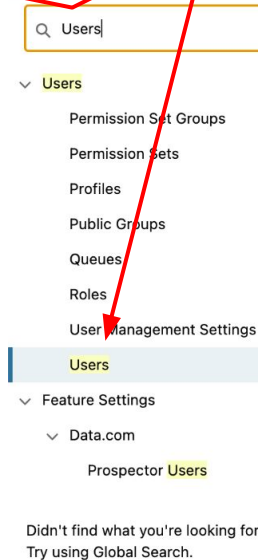
1. Click on 'Edit', check the box to 'Run Flows' and click Save. But we will not do this now as we have already granted the user access from user's record

The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup, Home, Object Manager, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, and Lightning Usage. The main content area is titled 'SETUP Profiles'. It displays a list of permissions for a profile, with the 'Run Flows' checkbox checked. The 'Run Flows' permission description is: 'In this org, run any active flow. In Experience Builder sites, run any active flow that's distributed with the Flow Lightning component.'

Permission	Checkbox	Description
Remove People from Direct Messages	<input type="checkbox"/>	Lets a user remove others from direct messages the user is in.
Report Builder	<input type="checkbox"/>	Create, edit, and delete reports using the classic report builder interface.
Report Builder (Lightning Experience)	<input type="checkbox"/>	Create, edit, and delete reports using the enhanced report builder interface. Only available in Lightning Experience.
Run Flows	<input checked="" type="checkbox"/>	In this org, run any active flow. In Experience Builder sites, run any active flow that's distributed with the Flow Lightning component.
Run Reports	<input checked="" type="checkbox"/>	Run reports and dashboards.
Salesforce Anywhere in Lightning Experience	<input type="checkbox"/>	Use Salesforce Anywhere in Lightning Experience
Salesforce Anywhere on Mobile	<input type="checkbox"/>	Use the Salesforce Anywhere mobile app
Salesforce Mobile App: Native scrolling on webviews	<input type="checkbox"/>	Replace ui:scroller with native scrolling on webviews. Users experience smoother scrolling.
Schedule Reports	<input type="checkbox"/>	Schedule report refreshes in Salesforce Classic, and send email notifications that include refreshed reports in HTML format. Your organization's data may be saved and/or processed by third-party services, and Salesforce is not responsible for data users choose to send outside of Salesforce.
Select Files from Salesforce	<input checked="" type="checkbox"/>	Selecting a Salesforce file is an option when attaching a file.
Send announcement emails	<input type="checkbox"/>	Allows email notifications to be sent when a user posts an announcement.
Send Custom Notifications	<input type="checkbox"/>	Trigger the Send Custom Notification action in flows that run in user context, REST API calls, and Apex callouts.
Send Email	<input checked="" type="checkbox"/>	Send email to a single contact or lead.
Send Non-Commercial Email	<input checked="" type="checkbox"/>	Send non-commercial end-user emails to contacts, leads, and person accounts who opt out of email or who choose Don't Market in data privacy records. This permission doesn't apply to the Cases email action, Lightning Experience list email, or Salesforce Classic mass email.
Send Outbound Messages	<input checked="" type="checkbox"/>	Send outbound messages to an external Web service API.
Show App Launcher in Experience Cloud Sites	<input type="checkbox"/>	Display the App Launcher icon in Experience Cloud sites.
Show Company Name as Site Role	<input checked="" type="checkbox"/>	Allow users to see other users' company name in site role.
Show Custom Sidebar On All Pages	<input type="checkbox"/>	Display a custom sidebar on all pages in Salesforce.com.
Skip Device Activation at Login	<input type="checkbox"/>	Allow a Salesforce Customer Support representative to log in to this org without verifying their identity in order to troubleshoot an issue.
Subscribe to Dashboards	<input type="checkbox"/>	Subscribe to dashboards in Lightning Experience to schedule dashboard refreshes and send notifications by email. Your organization's data may be saved and/or processed by third-party services, and Salesforce is not responsible for data users choose to send outside of Salesforce.
Subscribe to Dashboards: Add Recipients	<input type="checkbox"/>	Specify recipients of email notifications from dashboard subscriptions in Lightning Experience. All recipient email addresses appear in the subscription email's

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

Users | Salesforce

ing.force.com/lightning/setup/ManageUsers/home

Search Setup

SETUP
Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: All Users [Edit](#) | [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Full Name ↑	Alias	Username	Last Login	Role	Active	Profile	Manager
<input type="checkbox"/> Edit	Agarwal, Ashish	AAgar	ashish@asagarwal-flows-dev-ed.com	8/4/2021, 11:35 PM		✓	System Administrator	
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5g000005iapmeas.hvpbfwec8ukt@chatter.salesforce.com			✓	Chatter Free User	
<input type="checkbox"/> Edit Login	Parker, Anna	apark	anna@asagarwal-flows.com			✓	Standard User	
<input type="checkbox"/> Edit	User, Integration	integ	integration@00d5g000005iapmeas.com			✓	Analytics Cloud Integration User	
<input type="checkbox"/> Edit	Integration User	int	int@00d5g000005iapmeas.com			✓	Analytics Cloud Security User	

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Granting Users Access to Run Flows

Recently Viewed | Accounts | S x | Home | Salesforce x | Home | Salesforce x +

asagarwal-flows-dev-ed.lightning.force.com/lightning/page/home

Logged in as Anna Parker (anna@asagarwal-flows.com) [Log out as Anna Parker](#)

All Search...

Sales Console Home

Quarterly Performance

As of Today 3:50 PM

CLOSED \$0 OPEN (>70%) \$0 GOAL --

500k
400k
300k
200k
100k
0

Aug Sept Oct Nov

■ Closed ■ Goal ■ Closed + Open (>70%)

Add the opportunities you're working on, then come back here to view your performance.

New Account Screen Flow

Please enter the Account details.

* Account Name

Website

Pause Next

Assistant

Nothing needs your attention right now. Check back later.

Today's Events Today's Tasks

History

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

