

Milestone 13 - Flows

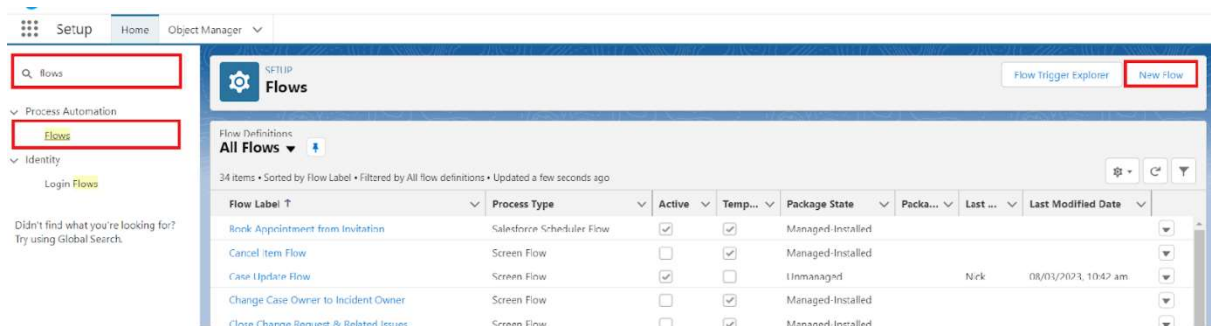
Use Case :

A sales representative needs to create a new booking for a customer who has expressed interest in a specific flight service. The representative wants to ensure that all relevant information is captured accurately and consistently.

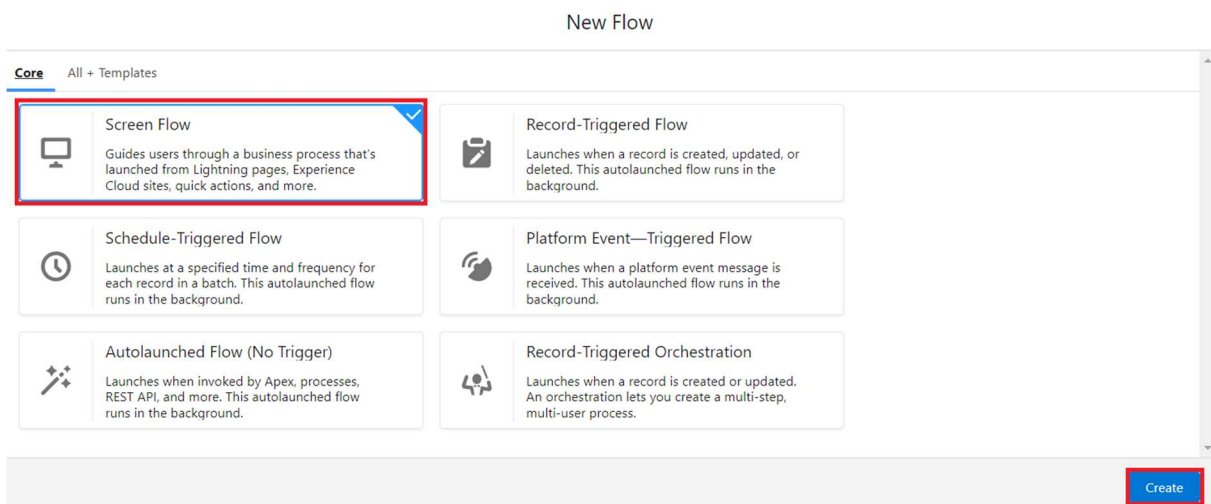
Activity 1 : Creating a Screen Element on booking object

Let's start by creating a screen flow and adding a screen to it.

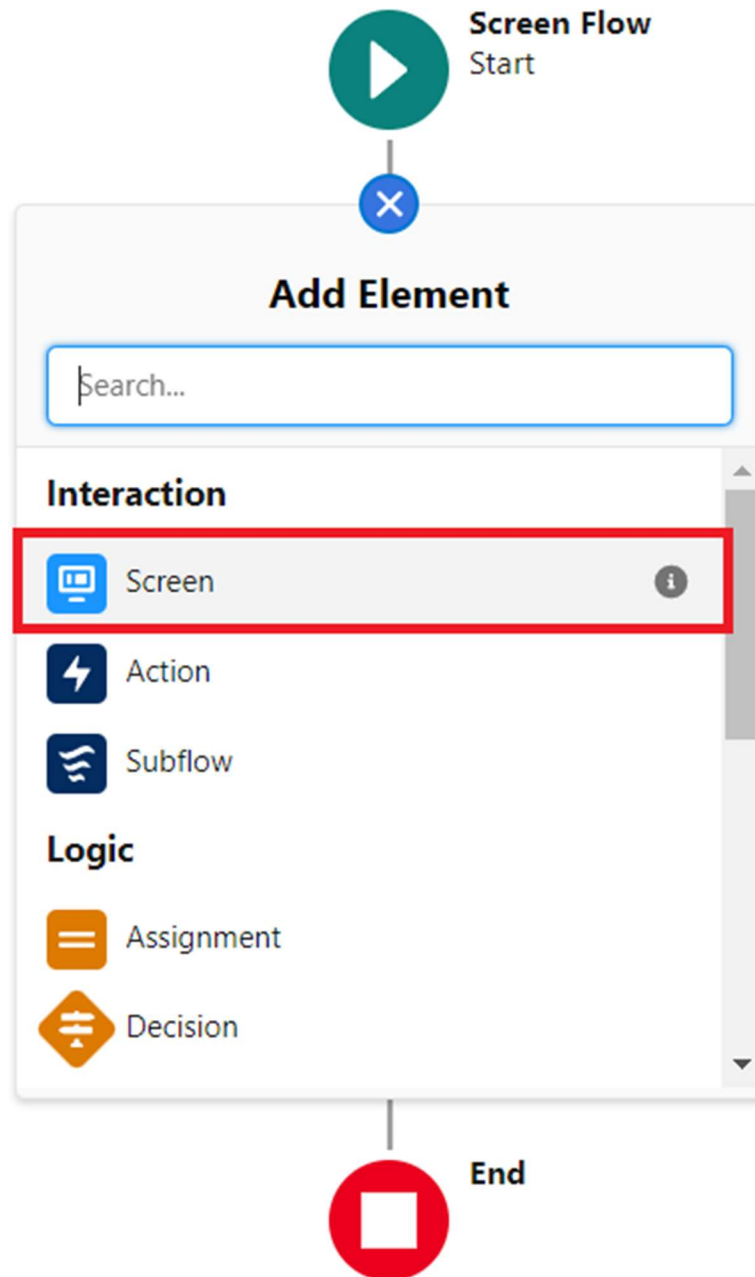
1. From Setup search for the “Flows” in quick find and select “New Flow”.



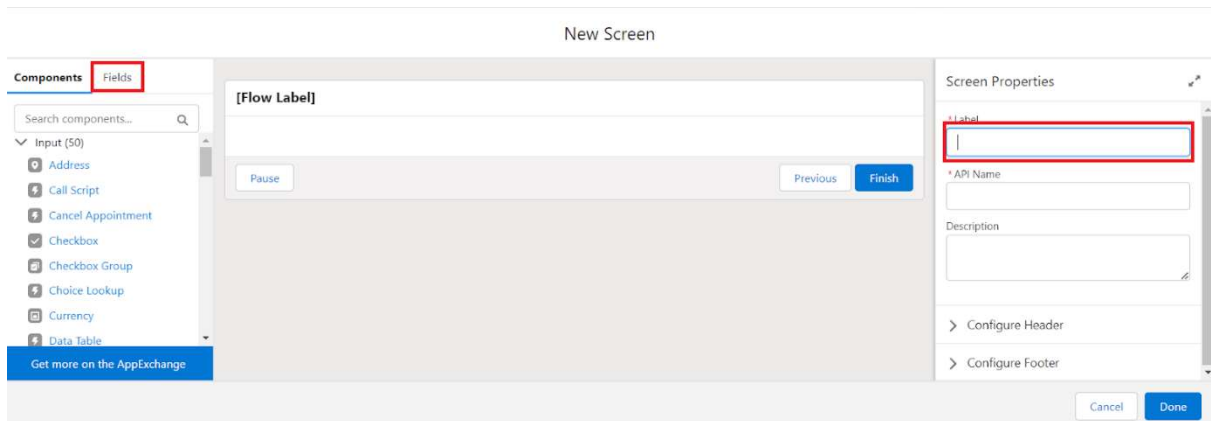
2. Select “Screen Flow” and then click on “Create”.



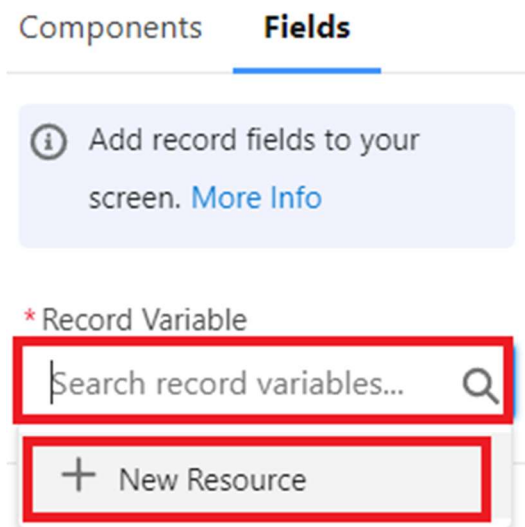
3. Place the cursor in between the Start and End element, a “+” icon appears, click on that and select “Screen”.



4. Give the label as “Booking Screen”, and select “Fields”.



5. Click on the lookup icon in the input field and select “New Resource”.



6. Filling the fields as given below:
 - a. API name : bookingObject
 - b. Datatype : Record
 - c. Object : Booking

- d. Available for input : Checked
- e. Available for output: Checked

New Resource

* API Name

A value is required

Description

* Data Type

Record

☐ Allow multiple values (collection) ⓘ

* Object

Search objects...

Availability Outside the Flow

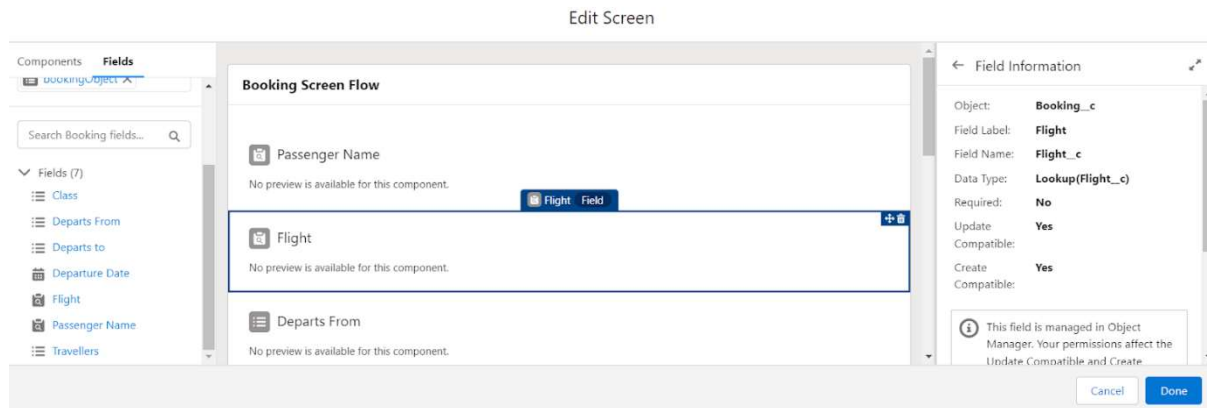
☐ Available for input

☐ Available for output

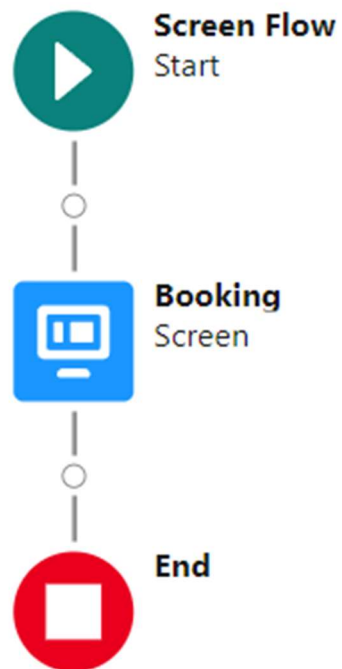
Cancel

Done

- 7. Click on done
- 8. Once you are done with the creation of a resource with the name “bookingObject” go back to step 5 and click on the lookup icon and select “bookingObject” from the list.
- 9. After selecting “bookingObject” you’ll have all the fields which are in the object, drag and drop each field on the screen.
- 10. Your screen will look like as shown below:



11. Click on done and Save.
12. The flow will look like as shown below.



Let's create a "Create Element" and add it to screen flow.

Activity 2 : Creating a Create Element on booking object

1. In the Create New path, hover over circle and click '+' icon in between booking screen and end.
2. Click Create Records.
3. In the New Create Records window, enter these values.

Field	Value
Label	Create Booking Record
API name	Gets autopopulated
How many records to create	one
How to set the record fields	Use separate resources and literal values
Object	Booking

New Create Records

Create Salesforce records using values from the flow.

* Label	* API Name
<input type="text"/>	<input type="text"/>
A value is required.	

Description

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

4. Map the fields as shown below:

Set Field Values for the Booking

Field	Value
Class__c	bookingObject > Class X
Departs_From__c	bookingObject > Departs From X
Departs_to__c	bookingObject > Departs to X
Departure_Date__c	bookingObject > Departure Date X
Flight__c	bookingObject > Flight X
Passenger_Name__c	bookingObject > Passenger Name X
Travellers__c	bookingObject > Travellers X

+ Add Field

Cancel Done

5. Click Done.

Activity 3 : Creating a Success Screen Element

1. In the Create New path, hover over circle and click '+' icon in between Create Booking Record and end.
2. Click the Screen element.
3. Give a label name as "SuccessScreen".
4. From components search "Display text" and drag that component in the canvas and give an API Name as "SuccessMessage".
5. Inside the text area copy this message.

We are happy to inform you that your booking for [tour name] is confirmed! Get ready to create some unforgettable memories. We've made things easy for you and included all of your booking details in this very email. All you need to do is show us this email on the day you arrive, and you'll be good to go!

Date: {!bookingObject.Departure_Date__c}

Departs from: {!bookingObject.Departs_From__c}

Departs to: {!bookingObject.Departs_to__c}

Class: {!bookingObject.Class__c}

Travellers: {!bookingObject.Travellers__c}

Passengers Name: {!bookingObject.Passenger_Name__r.Passenger_Name__c}

We can't wait to see you!

6. Click Done
7. Save the flow and Activate it.

Thank you...!!