

# CREATE A SCREEN FLOW FOR A BASIC SURVEY

On the Setup page for the search for Flow, click Flow.

Click New flow.

Select screen flow and then click create.

1. Click screen in Element tab and the popup box are open

In screen properties

Label: Scr\_opp\_details1, The API Name are auto fill,

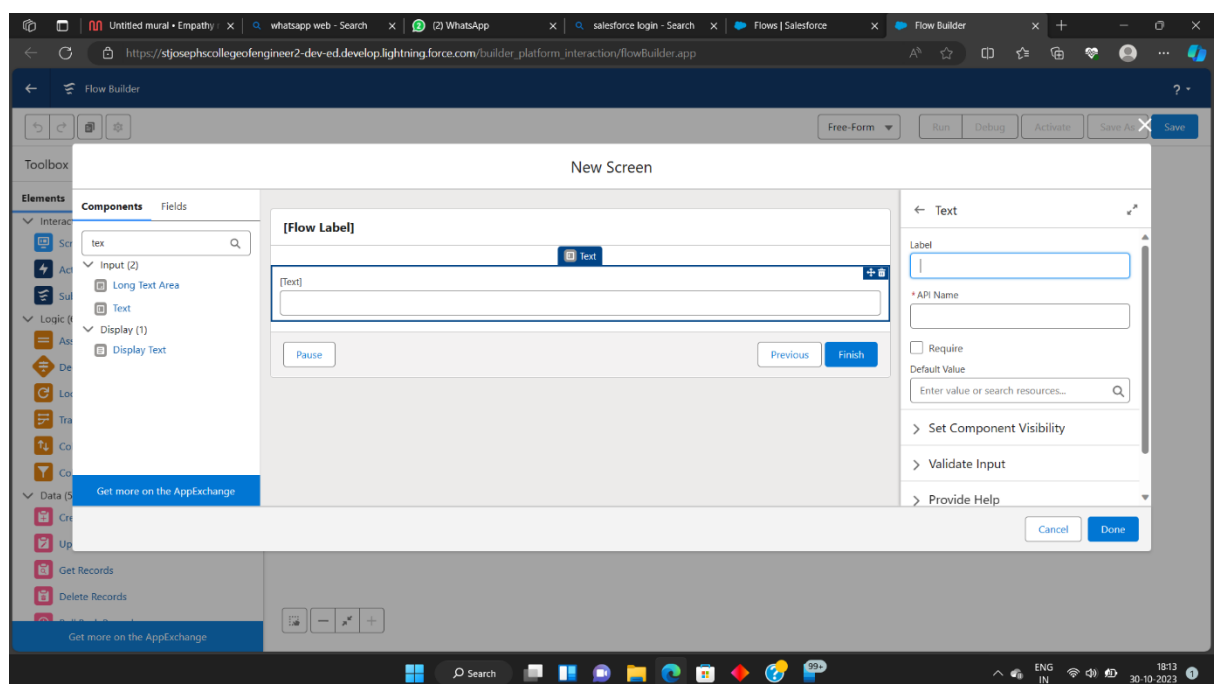
2. In Screen Components search 'text' then click it the text box are open.

Click the box then

Label: Opportunity Name

API name: Opportunity\_Name

## New screen 1

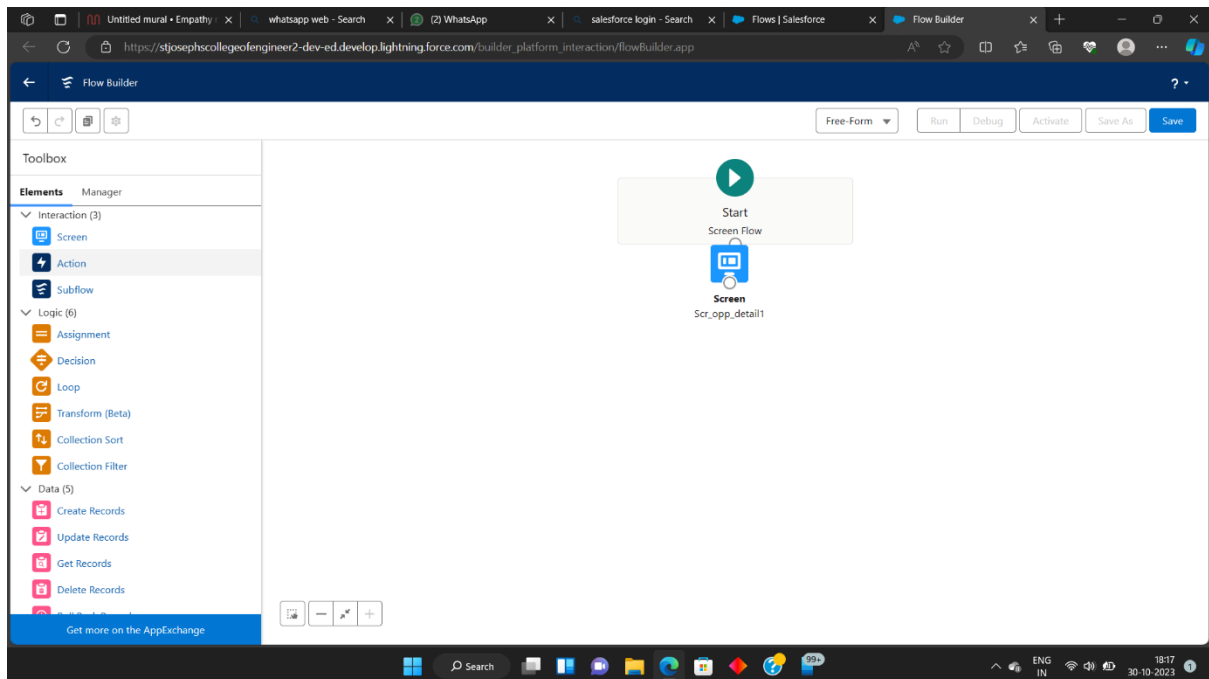


3. Follow the above step search 'Date'

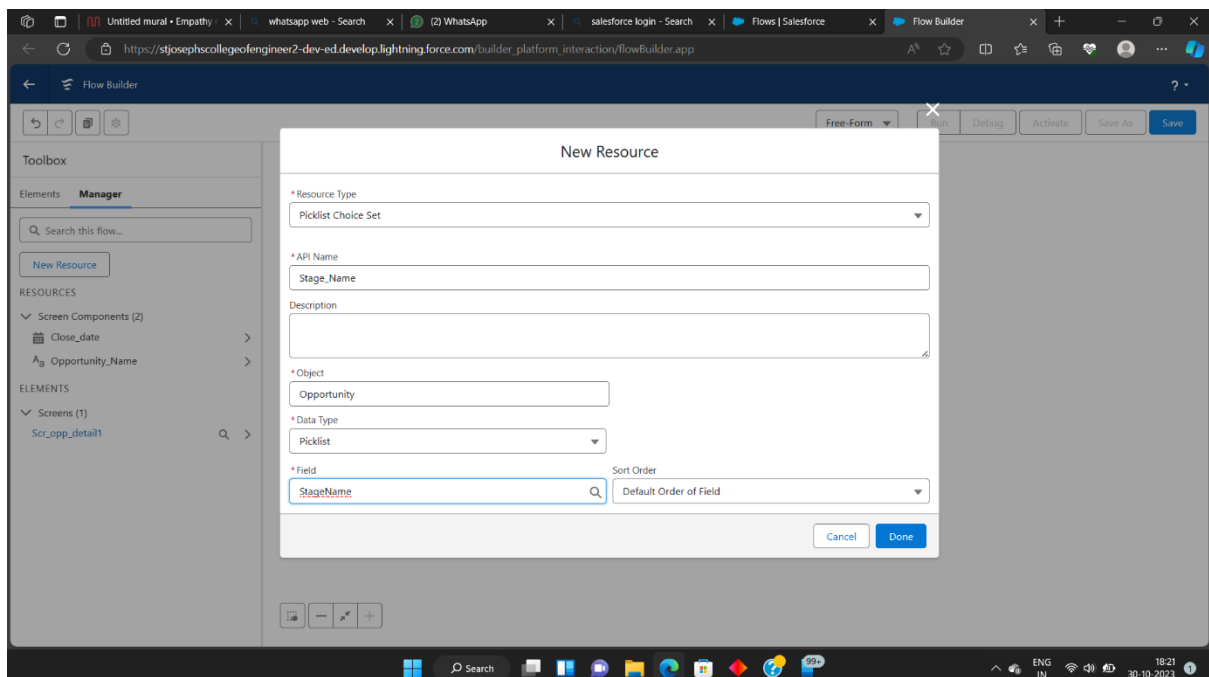
Label: Close Date

API Name: Close\_Date

4. Click Done



Click the manager in Tool Box, New resource



The same procedure is followed in screen flow

1. Click 'Screen' in Element tab and the popup box are open

In screen properties

Label: Scr\_opp\_details2, The API Name are auto fill,

2. In Screen Components search 'Picklist' then click it the Picklist box are open.

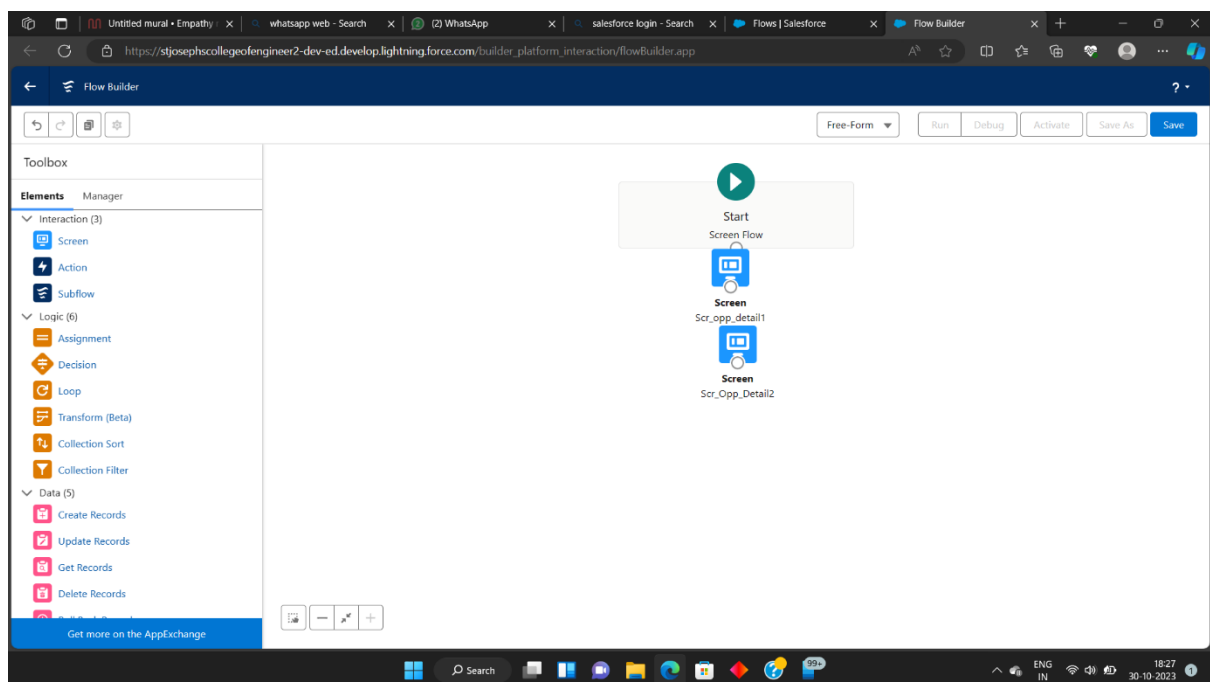
Click the box then

Label: Stage

API name: Stage

Data Type: Text

Scroll down, 'Choice' Box, select : {!Stage\_Name}, Then **Done**



Click 'Create Record' in Element tab and the popup box are open

- Label: Create Opportunity, API Name auto create
- How to set the record fields select 'Use separate resources, and literal values
- Field select 'Name', Value select {!Opportunity\_Name}
- Add Field, select 'CloseDate', Value select {!Close\_Date}
- Add Field, select 'StageName', Value select {!Stage}
- Click Done.

Save flow.

The top screenshot displays the Salesforce Flow Builder interface for a flow named 'Create Opportunity Record - V1'. The flow is in 'Free-Form' mode and is currently inactive. The flow diagram shows a sequence of steps: a 'Start Screen Flow' screen, followed by two 'Screen' components (Scr\_opp\_detail1 and Scr\_opp\_detail2), and finally a 'Create Records' action. The 'Create Records' action is configured to create a new record in the 'Opportunity' object. The 'Field' is set to 'Name', and the 'Value' is set to the variable {!Opportunity\_Name}. The 'Add Field' button is visible, indicating that additional fields can be added to the record. The 'Done' button is also visible, indicating that the flow can be saved.

The bottom screenshot displays the 'Create Opportunity Record' form in the 'Debug' tab. The form has a 'Stage' dropdown menu with 'Prospecting' selected. The 'Previous' and 'Next' buttons are visible. The 'Debug Details' panel on the right shows the flow's execution history, including the start time, transaction committed status, and the values of the variables Opportunity\_Name, Close\_date, and Stage.

**How the Interview Started**  
Naveen N (0055g00000tvCw) started the flow interview.  
API Version for Running the Flow: 59

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

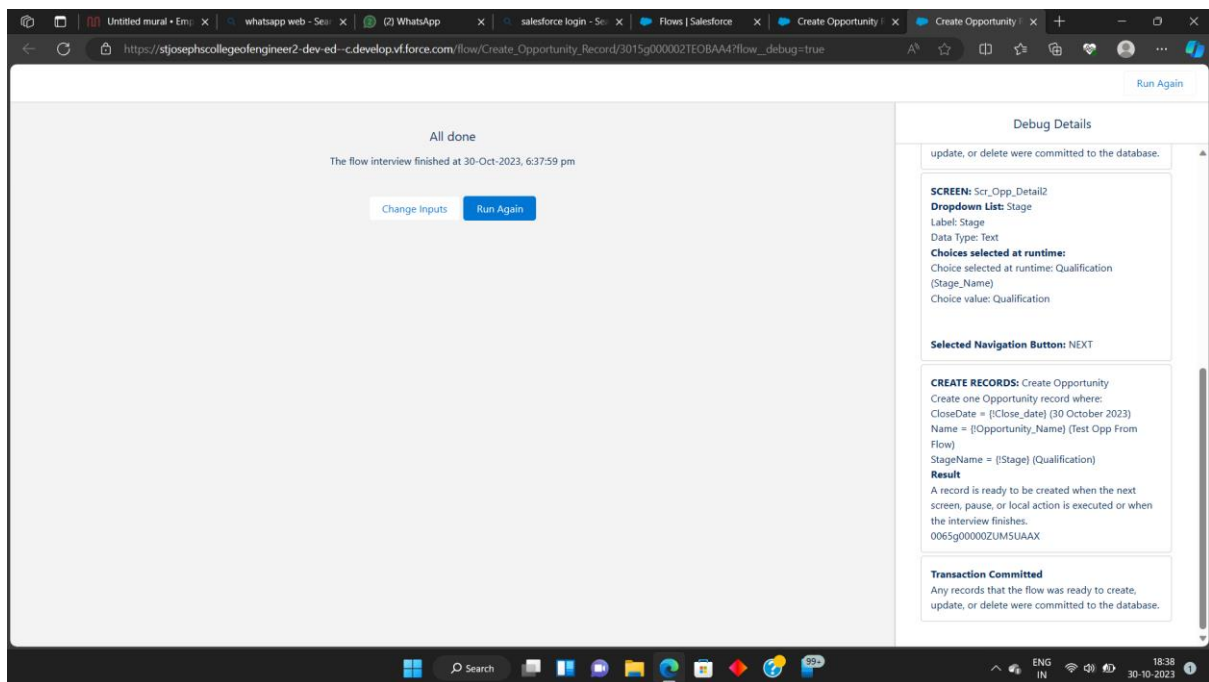
**SCREEN: Scr\_opp\_detail1**  
**Textbox:** Opportunity\_Name  
Label: Opportunity Name  
Value at run time: Test Opp From Flow

**Date:** Close\_date  
Label: Close date  
Value at run time: 30 October 2023

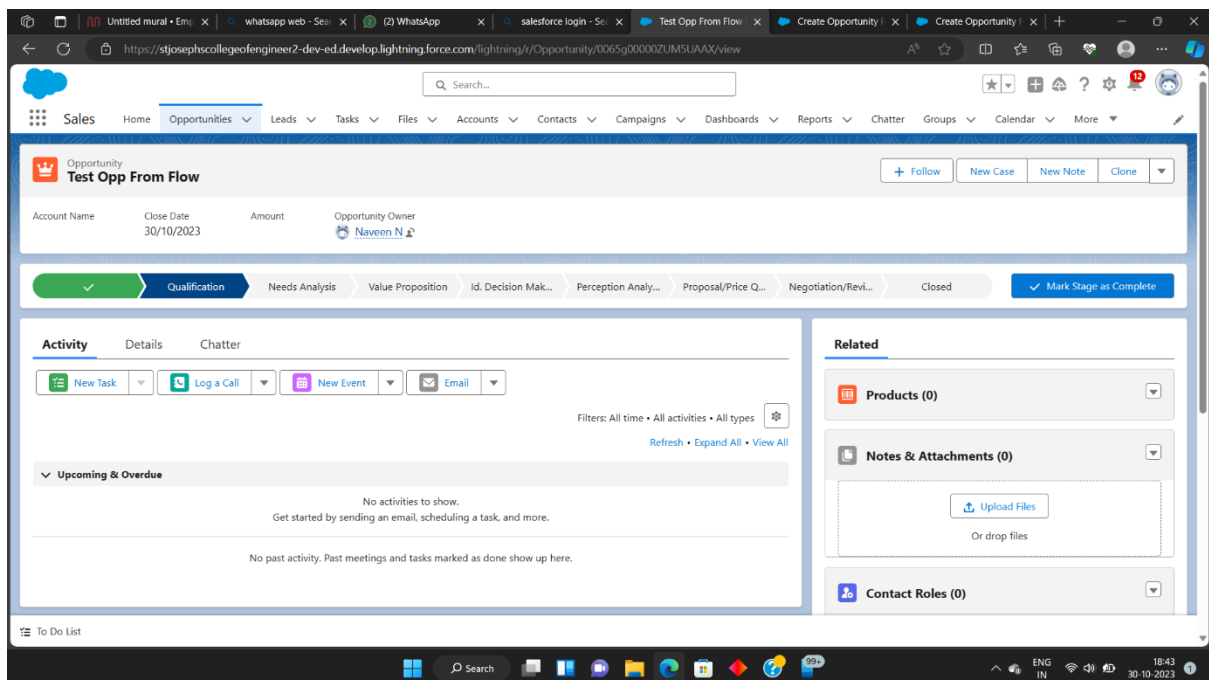
**Selected Navigation Button:** NEXT

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

All steps are completed then Run the screen flow.



Click Run Again



Test Opp From Flow

Follow

New Case

New Note

Clone

Account Name

Close Date

Amount

Opportunity Owner

30/10/2023

Naveen N

Needs Analysis

Value Proposition

Id. Decision Mak...

Perception Analy...

Proposal/Price Q...

Negotiation/Revi...

Closed

Mark Stage as Complete

Activity

Details

Chatter

New Task

Log a Call

New Event

Email

Filters: All time • All activities • All types

Refresh

Expand All

View All

Upcoming & Overdue

No activities to show.  
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Related

Products (0)

Notes & Attachments (0)

Upload Files

Or drop files

Contact Roles (0)

To Do List