Lightning Flow Scenarios

Screen Flow

1. Create an opportunity using screen flow, launch flow through a button and link it with an account.[Hint: Check on Opportunity Object which fields are required, place them on screen to have input from user]
2. Create a case using screen flow, launch flow through a button and link it with the account. [Hint: Check on Case Object which fields are required, place them on screen to have input from user]
3. Create a contact through screen flow, place flow on account record page. Link contact with account. [Read First Name, Last Name, Phone & Email from User]
4. Create a contact related to account and upload a file using Screen Flow. Launch flow through the account record page.
5. Create a contact related to account and send a welcome email to the contact's email address using ScreenFlow. Launch flow through the account record page.
6. Create a screen flow to get First Name, Last Name, Email, Phone, Account (lookup) from User. Now create a Contact record related to the account selected on screen. Also have a checkbox on screen whether to upload a file or not related to Contact record. Send welcome email to the email address provided on contact. Place the flow on the home page and test.
7.
    a. Screen flow should show three options: Contact, Opportunity & Case. User will select an option then accordingly create a record. Place flow on Account using a quick action [Button Label: Create Record].
    b. Now, update the flow created in step (a), while creating contact or opportunity copy account phone into contact phone as well as in opportunity phone using Get Record Element. Create a custom phone field on opportunity.
    c. Upload files on Contact, Case, Opportunity too.

8. Create three separate screen flows to create Contact, Case and Opportunity. Now call these sub flows through one flow. Main flow will show three options as Case, Contact and Opportunity, based on user input respective sub flow should work. Launch the main flow from the account record page through quick action. [Button Label: Create Record - Sub Flow]
9. Take **Customer Name** (Text), **Feedback Date** (Date) and **Feedback** (Picklist) as input from User. Feedback should be a picklist containing ‘Happy’, ‘Not Happy’ and ‘May be’ as values. If the user selects Happy then create an opportunity, if Not Happy then create a Case, if May be is entered then display a message “We will do our best to improve the services”. At last display a message saying “Thanks for providing your valuable feedback” no matter whatever feedback the user provides.
    a. Place the flow on the Home Page.
    b. Place the same flow on the Account Record Page so that new opportunity or case can be linked with the account from which feedback is raised.
10.
    a. Ask how many Opportunities a user has to create on an Account through screen flow. Use loop and record collection variables in flow.
    b. Screen flow should show three options: Contact, Opportunity & Case and also ask how many records to be created for the selected option. Accordingly, create records related to Account. Place flow on Account using a quick action.
11. Create a screen flow to copy some fields of account record into another account record. On the source record you need to place the flow. Destination record, the user will select from the screen through a picklist. This flow will be for Account objects. You need to copy fields like Phone, Rating from source to destination. [Hint: use record choice set]
12.
    a. Create a Text Field on Account Object called "Alert Note" [through Object Manager not in flow]. Now Create a Screen Flow that displays the Account Alert Note. Add the Screen Flow to the Account Lightning

Page at the top of the right column. Add a Visibility Filter that only shows the element if a value is present in the "Alert Note" for the Account.

b. Add the SAME Screen Flow to the Case Lightning Page at the top of the right column. Add a Visibility Filter that only shows the flow if a value is present on the "Alert Note" for the related Account.

13. Get Accounts where Type = ‘Customer - Direct’ and Account where Active = Yes. Display both collections on a screen and verify duplicate record ids. Now deduplicate both the collections and display the collection having unique values on screen.

14.

a. Create duplicate contacts (having same email ids) from UI. Now Get all Contacts in flow where Email is not null. Now show the Contact info on screen to verify duplicates. Remove duplicate records based on email id. Now show unique records on screen and verify.

b. Fetch Contacts based on First Name and fetch based on Email. Now show the Contacts info on screen to verify duplicates. Remove duplicate records. Now show unique records on screen and verify.

15. Call Apex Invocable Method through Screen Flow in Salesforce

Record Triggered Flow

16. Record is Created.
    a. Upon creation of an account, a related Opportunity should be created automatically. [No Criteria]

        Opp name = Account Name

        Close Date = Today

        Stage = Prospecting

    b. Now add a criteria if Active = Yes on account then only new Opportunity should be created.

17. Create a Contact related to Account when a new Account record is created.

18. **Implement separate flows for each option. Later you can combine c and d.**
    a. When a contact is created then update the “Total Contact” field on account using Record Triggered Flow.
    b. Create two different flows to count “Total Opportunity” and “Total Case” related to Account.
    c. When the account phone is updated then update related contact’s phone as well through record triggered flow. **[With and Without Loop]**
    d. When the Account's billing address is updated then update Contact’s mailing address. **[With and Without Loop]**

19. Create two record types named as “Partner Case” and “Customer Case” on Case Object. On creation of Case populate the total number of Partner Case and Customer Case on Account object. Create Custom Fields labeled “Total Customer Case” and “Total Partner Case” on Account.

20. **Implement a and b in a single flow.**
    a. On Account Creation if Annual Revenue is >=10000 then create one related opportunity and send email to account owner. Also update the Description field of the account saying ‘Opportunity is created’.
    b. On Account Create if Annual Revenue is <10000 then send email to account owner and update description of account saying ‘Opportunity is not created’
21. When a Case is escalated, send custom notification to a public group. [Note: Create your own notification header and body]
22. As a Salesforce Admin, you are requested to copy all the Files attached to an Opportunity to its parent Account whenever the Opportunity is Closed-Won. This way, the Account record will have each file added to any of the Opportunities of the Account.
23. Delete the opportunity when its stage is set to closed-lost.
24. Assign a Permission Set automatically upon User Creation through Flow
25. Manual Sharing of Records through Flow Builder
26. Add User Automatically in Public Group upon User Creation
27. Apply Validation Rule based on Existing Record Data using Record Triggered Flow
28. When an Opportunity is set as Closed Won/Lost and Account is populated then post below message as chatter on the Opportunity: [using chatter post action and feeditem object]

    @[Account Owner] Opportunity is Closed Won/Lost.

    Closed Date: [Show closed date populated on Opportunity - Merge Field]

    Amount: [Show amount populated on Opportunity- Merge Field]

Schedule Triggered Flow

29. Update all Leads where Lead Source is web. Update the Website field (Create custom if not available) on leads with http://studysalesforce.com
30. Update all Cases where Case Origin is Phone and is not null. Update phone field with ‘123456’ value.
31. Create a reminder task on opportunity where opportunity is open and close date is less than today

Autolaunched Flow

32. Create a record triggered flow which will trigger when an Account is created. It will create a related contact. Now call an autolaunched flow to create a related opportunity.