

## Step-by-Step Guide: How to Build a Chat Assistant Salesforce Flow with OpenAI ChatGPT Integration

This guide provides a detailed set of instructions for creating a Salesforce flow that retrieves data from Salesforce (Chatter message) and prompts the OpenAI ChatGPT API with it as a message. The flow presents the resulting ChatGPT response back to the user which then the user with a click of a button can save in the database and display in the Chatter app.

Estimated completion time: 20 – 30 minutes

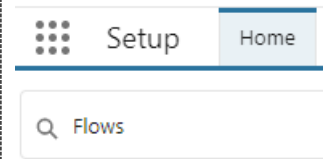
Pre-requisites to complete before this task:

- Step-by-Step Guide - How to Build a Simple Salesforce Flow with OpenAI ChatGPT Integration

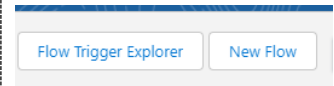
1. Go to the Salesforce Setup by clicking on the gear icon on the top-right corner of your Salesforce home page and selecting "Setup" from the dropdown.



2. In the Setup menu, navigate to the Quick Find box and type "Flows".

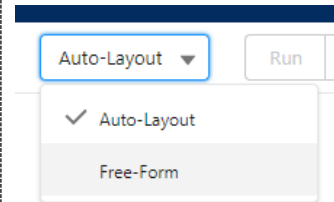


3. Select "Flows" from the search results, and then click the "New Flow" button on the top right corner of the page.

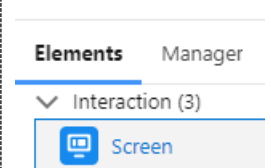


4. Select "Screen Flow" as the type of flow that you want, click "Create" to create and give your flow a name.

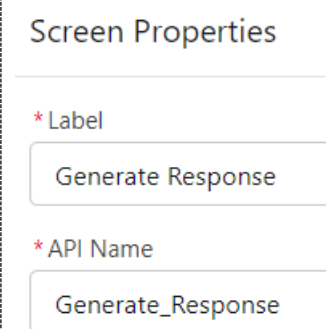
5. On the Flow Designer page, you will see a blank canvas. Select "Free-Form" from the flow layout dropdown in top-right part of canvas.



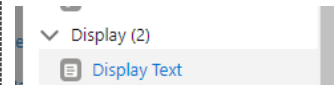
6. On the left-hand side, you will find a list of flow elements that you can add to your screen flow. Drag and drop the "Screen" element onto the canvas. This will open up the Screen Designer.



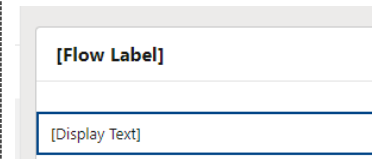
7. On the right hand side, fill in the "Label" field and click outside the field. The "API Name" field should populate automatically.



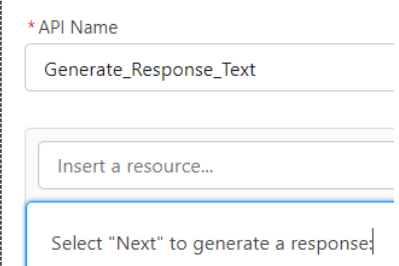
8. From the left hand side, drag and drop the "Display Text" element from the palette onto the screen canvas.



9. It should look like this:

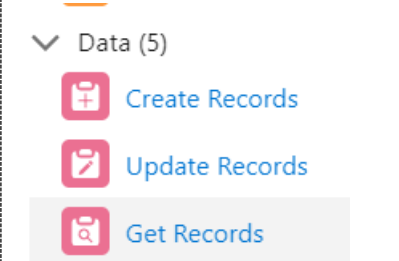


10. Enter an API name in the “API field” and a text in the text prompting the user to make an action area by first clicking on it.




11. In the bottom right corner select “Done”.

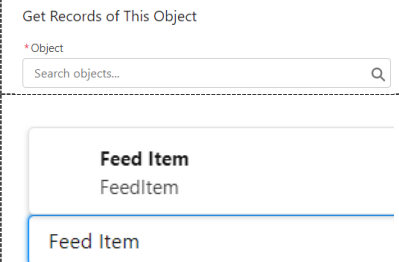
12. From the left hand side, drag and drop the "Get Records" element from the palette onto the screen canvas.



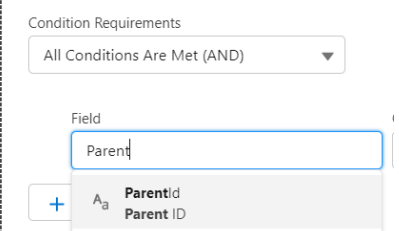
13. In the middle, fill in the “Label” field and click outside the field. The “API Name” field should populate automatically.



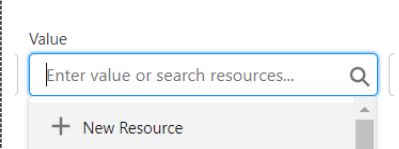
14. Under “Object” search for “Feed Item” and select it from the menu.



15. In the “Filter Feed Item Records” section in under “Field” search and select ParentId.



16. Under “Value” click inside the field box and select “New Resource”.



17. Populate the “New Resource” menu as on the right. Additional fields will open up as you start populating them from the top and going down.

\* Resource Type

Variable

\* API Name

recordId

Description

\* Data Type

Text

Default Value

Enter value or search resources...

**Availability Outside the Flow**

☒ Available for input

☐ Available for output

18. In the bottom right corner select “Done”.

19. In the “Sort Feed Item Records” section select “Descending” under “Sort Order”, and search and select “CreatedDate” under “Sort By”.

Sort Feed Item Records

Sort Order

Descending

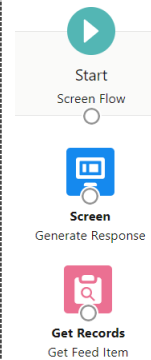
\* Sort By

createdDate

CreatedDate  
Created Date

20. In the bottom right corner select “Done”.

21. The canvas should contain these two elements.



22. On the left-hand side, drag and drop the “Action” element onto the canvas. This will open the Action Designer.

**Elements** Manager

Interaction (3)

Screen

Action

23. In the “Action” field start typing “Get GPT 3.5 Turbo Response” and select it from the dropdown.

## New Action

Action

Get GPT 3.5 Turbo Response

**Get GPT 3.5 Turbo Response**  
apex-Flow\_GPT35Chat

24. In the middle, fill in the “Label” field and click outside the field. The “API Name” field should populate automatically. Label example: “Get GPT 3.5 Turbo Response”

25. Switch the toggle on the right hand side next to “prompt”

26. Click inside the “prompt” field. From the dropdown, under “Record (Single) Variables” section, select “Feed Item from [API name of the Get Records element you added in Step 13]”

As prompt

Enter value or search resources...

RECORD (SINGLE) VARIABLES

Feed Item from Get\_Feed\_Item  
FeedItem

SCREEN COMPONENTS

Aa Generate\_Response\_Text  
Display Text

Enter value or search resources...

27. Then search and select “Body”.

et Input Value

Aa Body  
Body

(!Get\_Feed\_Item.Body)

28. Select “Done” button on the bottom right corner.

29. The canvas should contain these three elements, in addition to the start element.



**Screen**

Generate Response



**Get Records**

Get Feed Item



**Apex Action**

Get GPT 3.5 Turbo  
Response

30. From the left-hand side, drag and drop another “Screen” element onto the canvas. This will open up the Screen Designer.

31. On the right hand side, fill in the “Label” field and click outside the field. The “API Name” field should populate automatically.

## Screen Properties

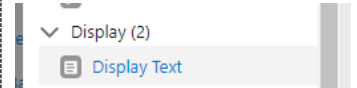
\* Label

Response Display

\* API Name

Response\_Display

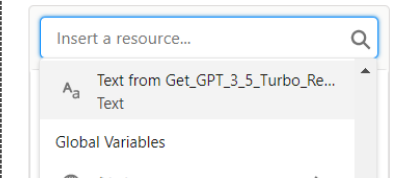
32. From the left hand side, drag and drop the "Display Text" element from the palette onto the screen canvas.



33. It should look like this:

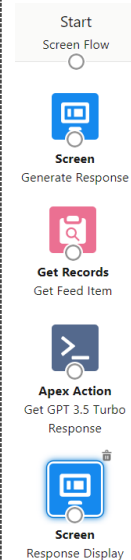


34. Click inside the “Insert a resource...” field and select “Text from [API name you set for the Action element in Step 24]”.

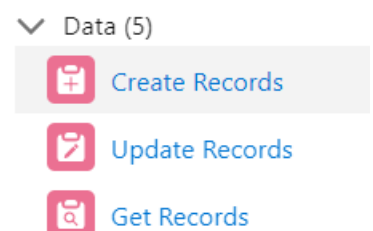


35. Select “Done” button the bottom right corner.

36. The canvas should contain these elements.



37. From the left hand side, drag and drop the "Create Records" element from the palette onto the screen canvas.



38.

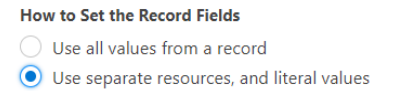
39. In the middle, fill in the “Label” field and click outside the field. The “API Name” field should populate automatically. Label example: “Get GPT 3.5 Turbo Response”



\*Label  
Create Feed Item

\*API Name  
Create\_Feed\_Item

40. Under the “How to Set the Record Fields” section select the “User separate resources, and literal values” radio button.



**How to Set the Record Fields**

☐ Use all values from a record

☒ Use separate resources, and literal values

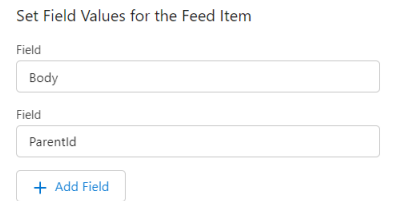
41. In the “Create a Record of This Object” section, under “Object” search and select “Feed Item”.



Create a Record of This Object

\* Object  
Feed Item

42. In the “Set Field Values for the Feed Item”, under “Field” search and select “Body”. Then select the “+Add Field” button and in the second field search and select “ParentId”.



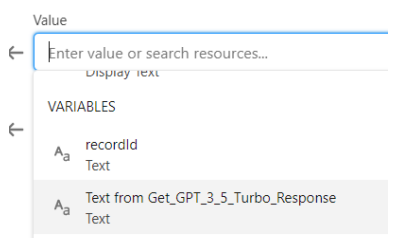
Set Field Values for the Feed Item

Field  
Body

Field  
ParentId

+ Add Field

43. In the same section, on the right hand side, search and select “Text from [API name you set for the Action element in Step 24]” in the first field, and “recordId” in the second field.



Value

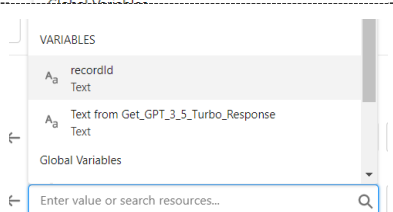
← Enter value or search resources...  
Display text

VARIABLES

← recordId  
Text

← Text from Get\_GPT\_3\_5\_Turbo\_Response  
Text

44. Select “Done” button the bottom right corner.



Global Variables

VARIABLES

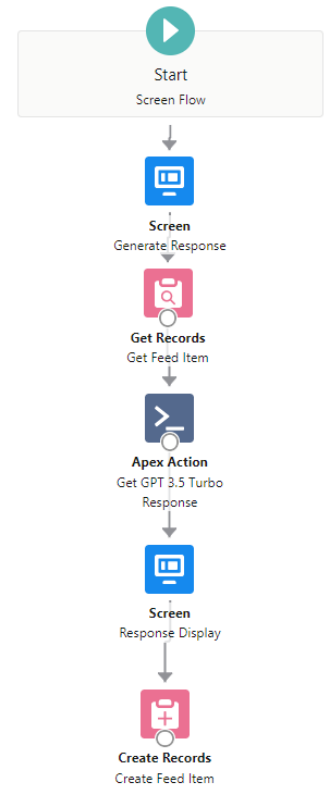
← recordId  
Text

← Text from Get\_GPT\_3\_5\_Turbo\_Response  
Text

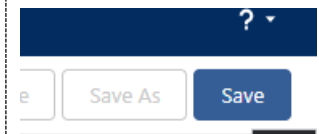
Global Variables

← Enter value or search resources... Q

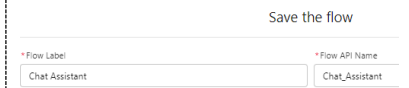
45. You can now connect the elements to other flow elements by using the connectors. Select the circle under an element and drag it to the next element. Connect the elements as show in the image on the right.



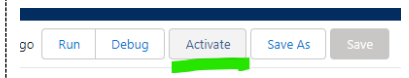
46. In the top right corner select “Save” button to save your Flow.



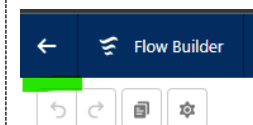
47. Enter the flows label and API Name and select “Save”.



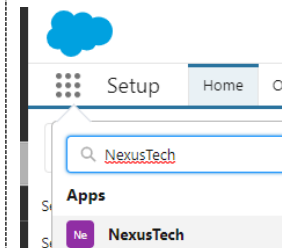
48. Activate your flow by clicking the "Activate" button on the top-right corner of the page.



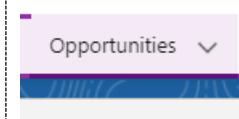
49. Return back to “Setup” by selecting the back arrow in the top-left corner.



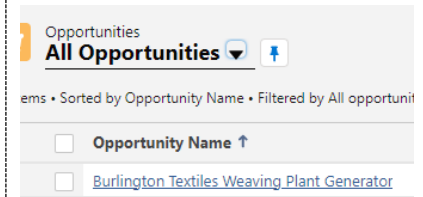
50. Select the App Launcher (nine dots) and type in “NexusTech” in the search field. From the dropdown select “NexusTech”.



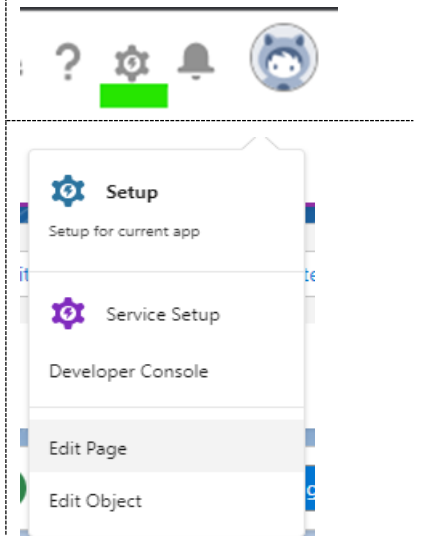
51. Select “Opportunities” tab next to “Accounts” towards the top-middle part of the page.



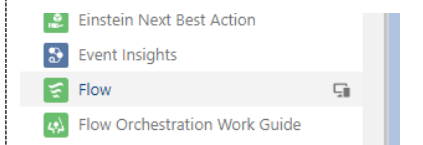
52. Select any name of from the list of Opportunities. In case you don't see any, confirm that you have selected "All Opportunities" list view as shown in the image. If not, select the dropdown icon and from the dropdown select "All Opportunities".



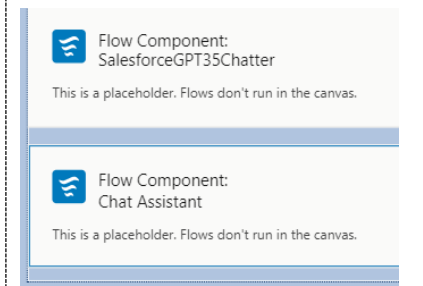
53. Click on the gear icon on the top-right corner and select "Edit Page" from the dropdown.



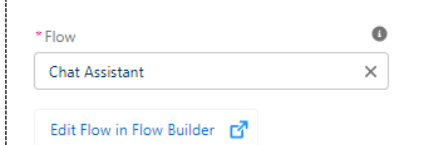
54. From "Components" pane on the left-hand side find the "Flow" element.



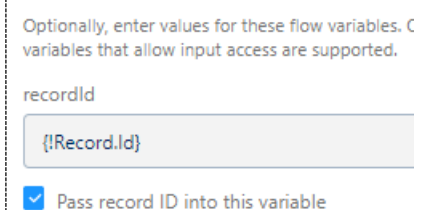
55. Drag and drop the "Flow" element underneath the other flow elements already on the screen.



56. If not already selected, on the right hand side under label "Flow" click inside the field and select the API name of the flow you created.

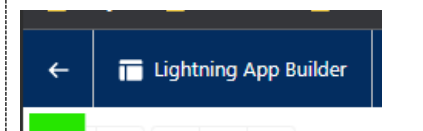


57. Below the "Flow" field confirm that the "Pass record ID into this variable" is selected. If this is not the case, confirm that you did the Step 17 as instructed. In case you named your variable different than "recordId", add that variable API name in the field box and select the checkbox.



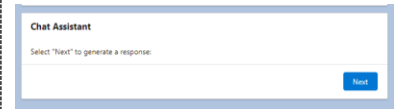
58. In the top-right corner select "Save".

59. In the top-left corner select the return arrow to return back to the Opportunity record.

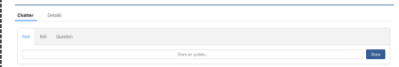




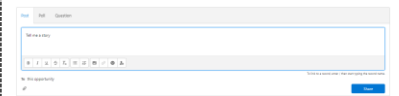
60. You should see your component added to the part of the page you placed it.



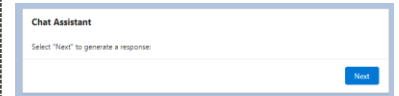
61. In the middle of the page confirm that you have selected the “Chatter” tab and select the “Share” button.



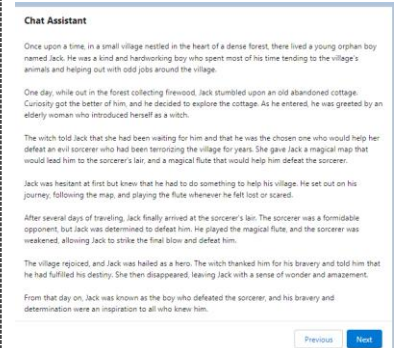
62. Enter a message and select “Share”.



63. Select “Next” on the component you added to the screen in Step 55.



64. Confirm that you get a response to the message you entered in Step 62 and select “Next”.



65. Confirm that you can see the message from the component posted in Chatter.

