

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

This guide provides a detailed set of instructions for creating a straightforward Salesforce flow that captures user-entered messages from a screen, prompts the OpenAI ChatGPT API with the message, and presents the resulting ChatGPT response back to the user.

Estimated completion time: 20 – 30 minutes

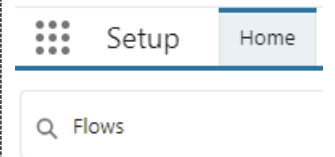
Pre-requisites to complete before this task:

- Preparing for Hands-On Tasks - Setting up Salesforce Sandbox (5 – 10 mins)

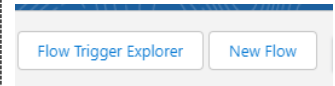
1. Go to the Salesforce Setup by clicking on the gear icon on the top-right corner of your Salesforce home page and selecting "Setup" from the dropdown.



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

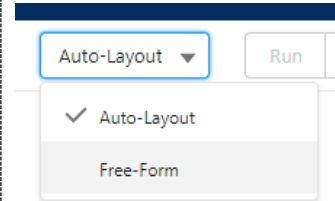


3. Select "Flows" from the search results, and then click the "New Flow" button on the top right corner of the page.

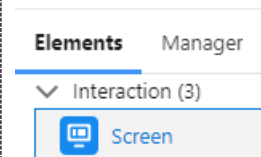


4. Select "Screen Flow" as the type of flow that you want, click "Create" to create and give your flow a name.

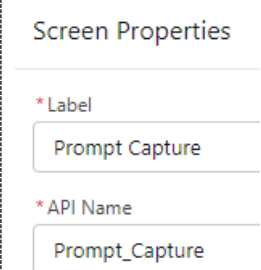
5. On the Flow Designer page, you will see a blank canvas. Select "Free-Form" from the flow layout dropdown in top-right part of canvas.



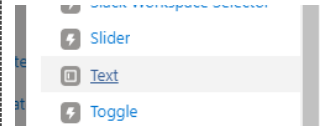
6. On the left-hand side, you will find a list of flow elements that you can add to your screen flow. Drag and drop the "Screen" element onto the canvas. This will open up the Screen Designer.



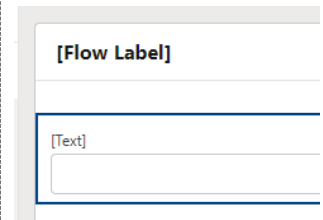
7. On the right hand side, fill in the "Label" field and click outside the field. The "API Name" field should populate automatically.



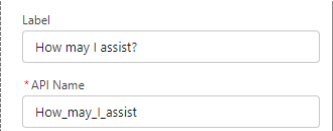
8. From the left hand side, drag and drop the "Text" element from the palette onto the screen canvas.



9. It should look like this:

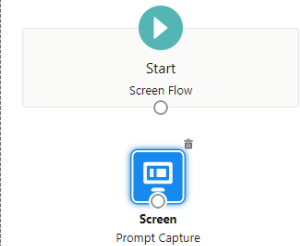


10. On the right hand side, fill in the “Label” field and click outside the field. The “API Name” field should populate automatically.

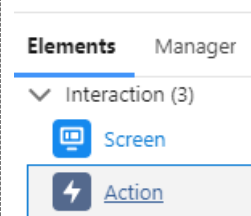


11. Select “Done” button the bottom right corner.

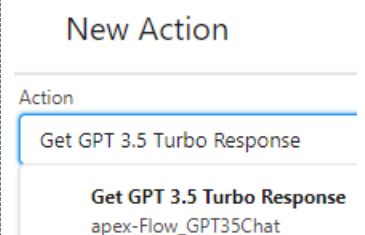
12. The canvas should look like the image on the right. You can move the screen element around with your cursor.



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



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

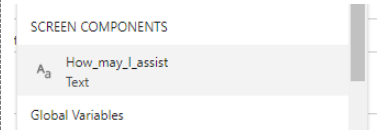


15. In the middle, fill in the “Label” field and click outside the field. The “API Name” field should populate automatically.

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

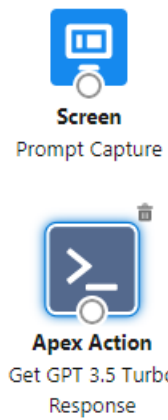


17. Click inside the “prompt” field. From the dropdown, under “Screen components” section, find the API name of the text input element you created on the screen in **step 10**. In our example it’s “How_may_I_assist”. Select it.



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

19. The canvas should contain these two elements, in addition to the start element.



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

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

Screen Properties

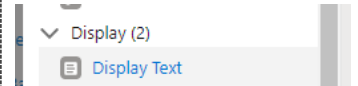
* Label

Completion Display

* API Name

Completion_Display

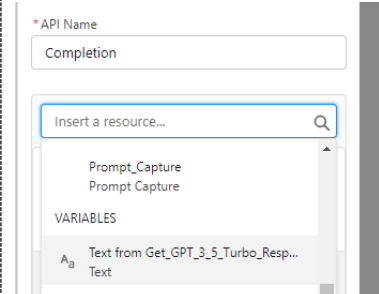
22. From the left hand side, drag and drop the "Text" element from the palette onto the screen canvas.



23. It should look like this:

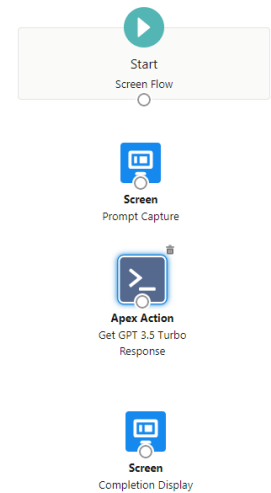


24. On the right hand side, fill in the “API Name” field. Then click inside the “Insert a resource...” field and select the variable with name “Text from [API name of the Action element you created in step 15.]”

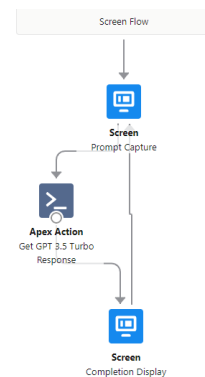


25. Select “Done” button the bottom right corner.

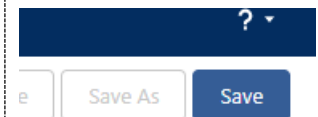
26. The canvas should contain these elements.



27. 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.



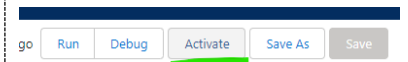
28. In the top right corner select "Save" button to save your Flow.



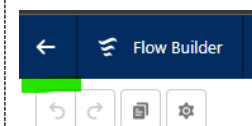
29. Enter the flows label and API Name.

This image shows a form with two input fields. The first field is labeled '* Flow Label' and contains the text 'AI Assistant'. The second field is labeled '* Flow API Name' and contains the text 'AI_Assistant'.

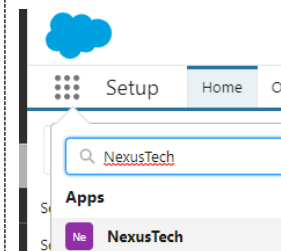
30. Activate your flow by clicking the "Activate" button on the top-right corner of the page.



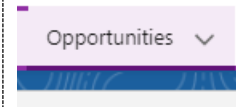
31. Return back to "Setup" by selecting the back arrow in the top-left corner.



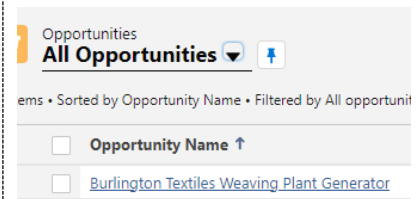
32. Select the App Launcher (nine dots) and type in "NexusTech" in the search field. From the dropdown select "NexusTech".



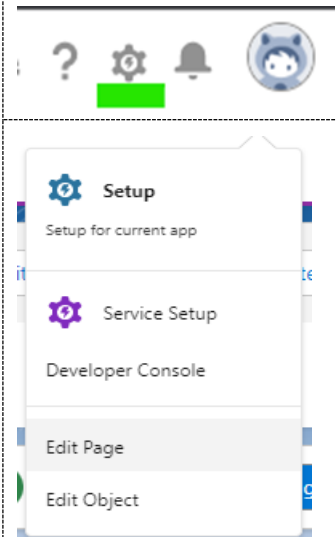
33. Select “Opportunities” tab next to “Accounts” towards the top-middle part of the page.



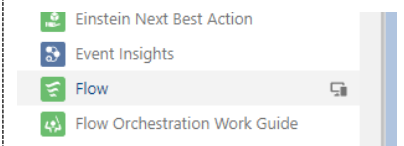
34. Select any name of from the list of Opportunities. In case you don’t see any, confirm that you have selected “All Opportunities” list view as shown in the image. If not, select the dropdown icon and from the dropdown select “All Opportunities”.



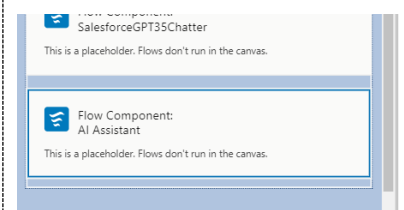
35. Click on the gear icon on the top-right corner and select “Edit Page” from the dropdown.



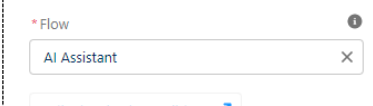
36. From “Components” pane on the left-hand side find the “Flow” element.



37. Drag and drop the “Flow” element underneath the “SalesforceGPT35Chatter” element already on the screen.

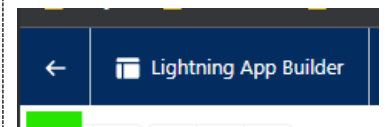


38. If not already selected, on the right hand side under label “Flow” click inside the field and select the API name of the flow you created.



39. In the top-right corner select “Save”.

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



41. You should see your component added to the part of the page you placed it in (Under “Chatter Assistant”). Try it out!

