

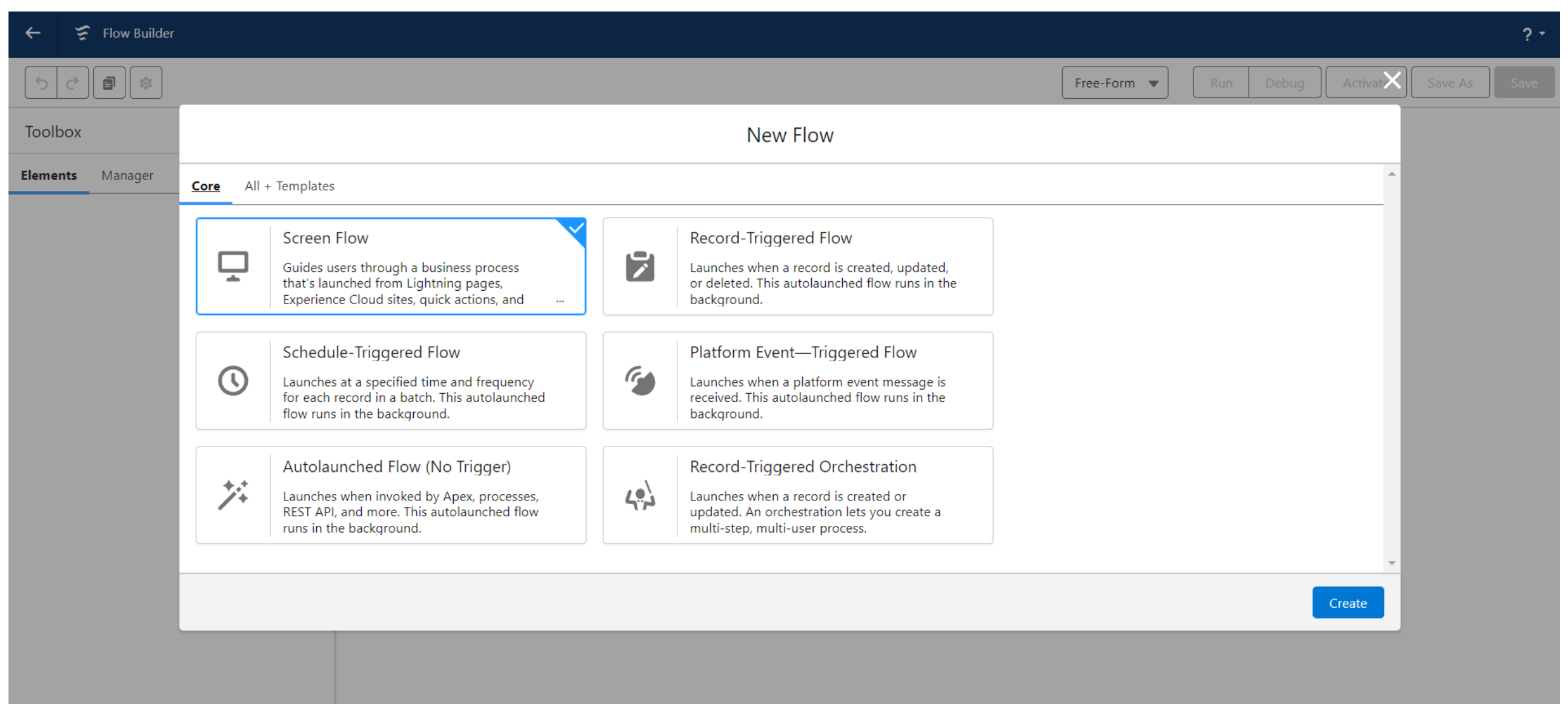
# Flow:

Flows in Salesforce, a flow is a tool that automates complex business processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows. Flow Builder can be used to build code-like logic without using a programming language. Flows fall into five categories:

- 1.Screen Flows
- 2.Schedule-Triggered Flows
- 3.Autolaunched Flows
- 4.Record-Triggered Flows
- 5.Platform Event-Triggered Flows

## 1)Create A Screen Flow

- 1.Click on Gear icon and select setup
- 2.In Quick find Box enter flow and select the flows
- 3.Click on New flow and Select Screen Flow.



- 4.Select resource type has variable.

5. Give api name as Recordid.

6. Select data type as Text.

5. At bottom for Availability outside the flow check box as Available for Input.

6. Click on done.

New Resource

\* Resource Type

Variable

\* API Name

Recordid

Description

\* Data Type

Text

☐ Allow multiple values (collection) ⓘ

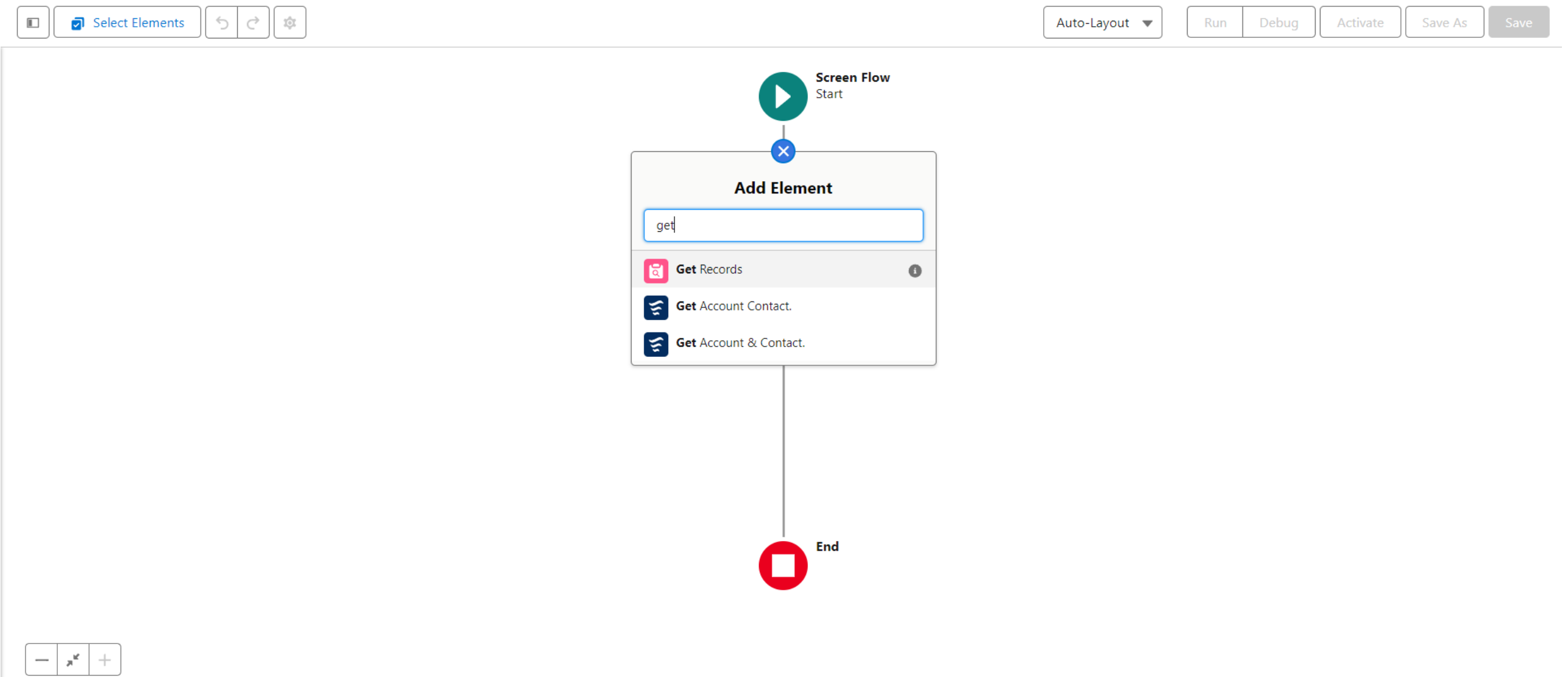
Default Value

Enter value or search resources...

Cancel

Done

7. Now give the label name as Get Account Record



8.For Get record of object choose object as - Account

9.For Filter account records condition requirements are - All conditions are met

10.Field- Account id Operator- equals Value-Recordid (variable which we had created )

11.For how many records to share - Only the first record

12.How to store record data- Automatically stores all fields.

13.Click on done.

The screenshot shows the configuration interface for a Salesforce Lightning component. It is divided into several sections:

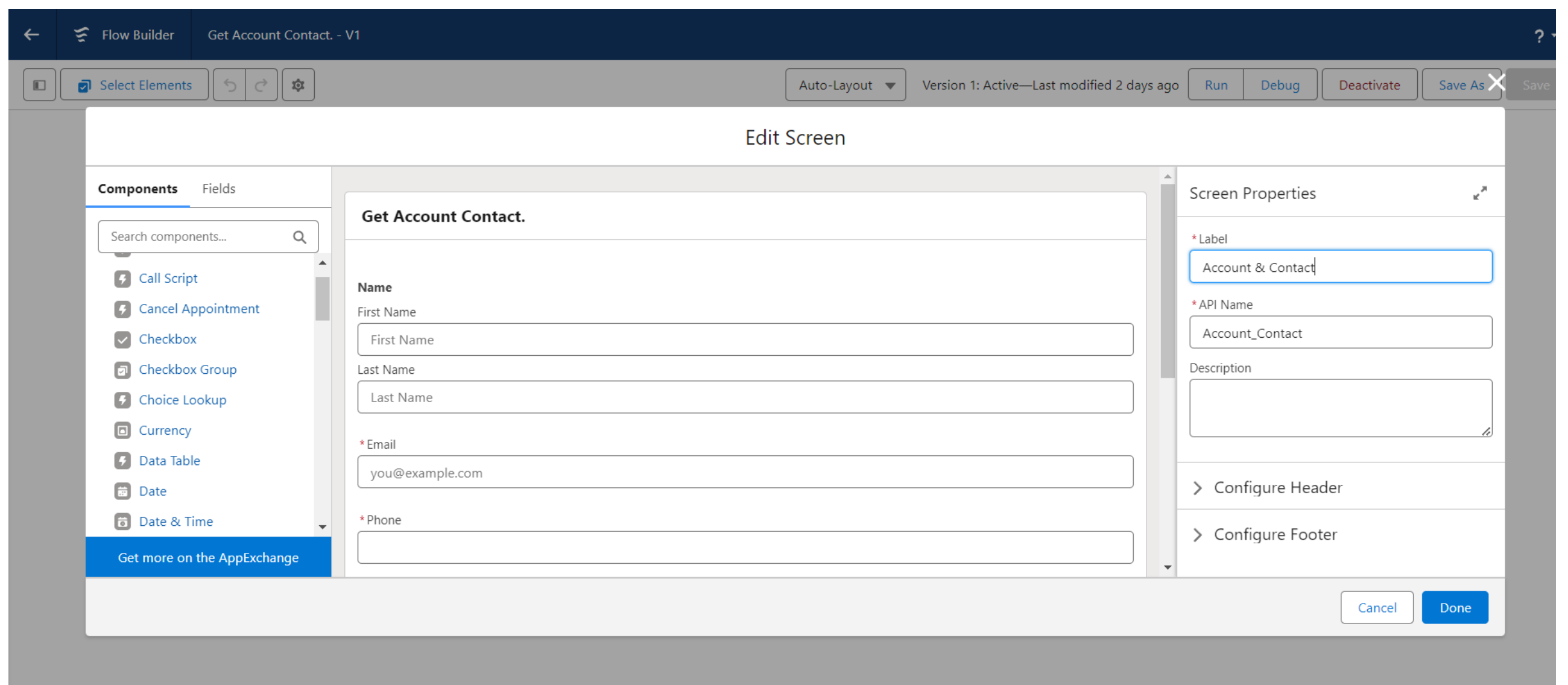
- \*Object:** A text input field containing "Account".
- Filter Account Records:**
  - Condition Requirements:** A dropdown menu set to "All Conditions Are Met (AND)".
  - Field:** A text input field containing "Id".
  - Operator:** A dropdown menu set to "Equals".
  - Value:** A text input field containing "Recordid" (with a blue 'a' icon and a close 'x' button).
  - + Add Condition:** A button to add more conditions.
- Sort Account Records:**
  - Sort Order:** A dropdown menu set to "Not Sorted".
  - Warning:** A yellow warning icon followed by the text "If you store only the first record, filter by a unique field, such as ID."
- How Many Records to Store:**
  - ☒ Only the first record
  - ☐ All records
- How to Store Record Data:**
  - ☒ Automatically store all fields
  - ☐ Choose fields and let Salesforce do the rest
  - ☐ Choose fields and assign variables (advanced)

14.Now again add the element below the Get account record and select Screen as your element

15.Give the label name as Get Account & Contact.

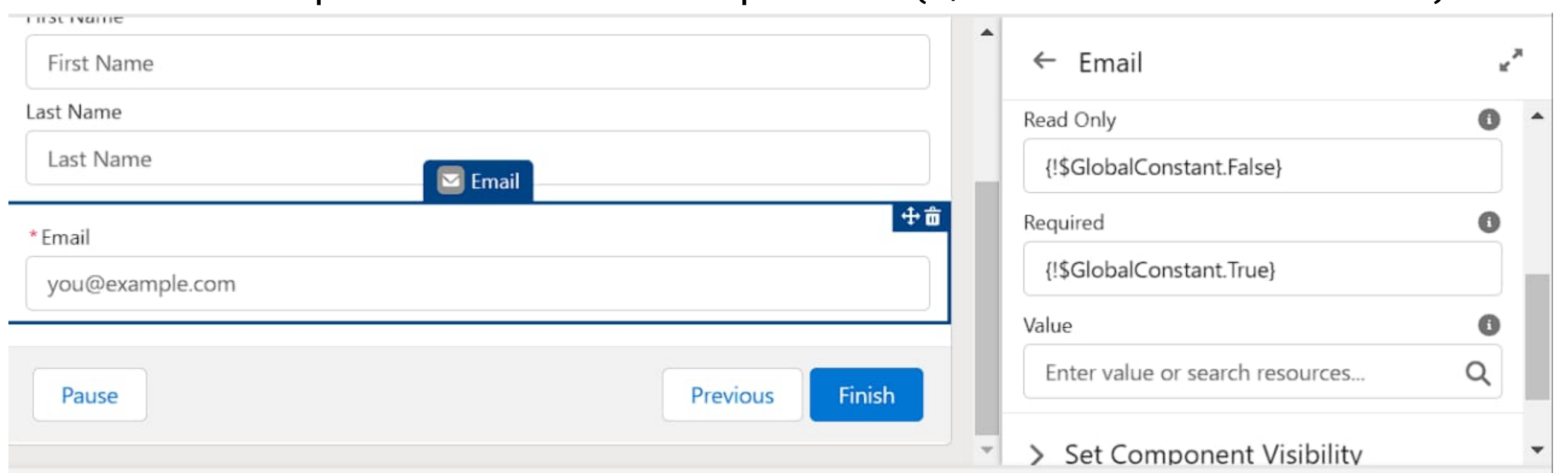
16.Left side in the component section search for Name and drag it to the screen

17. Give the api name as Name



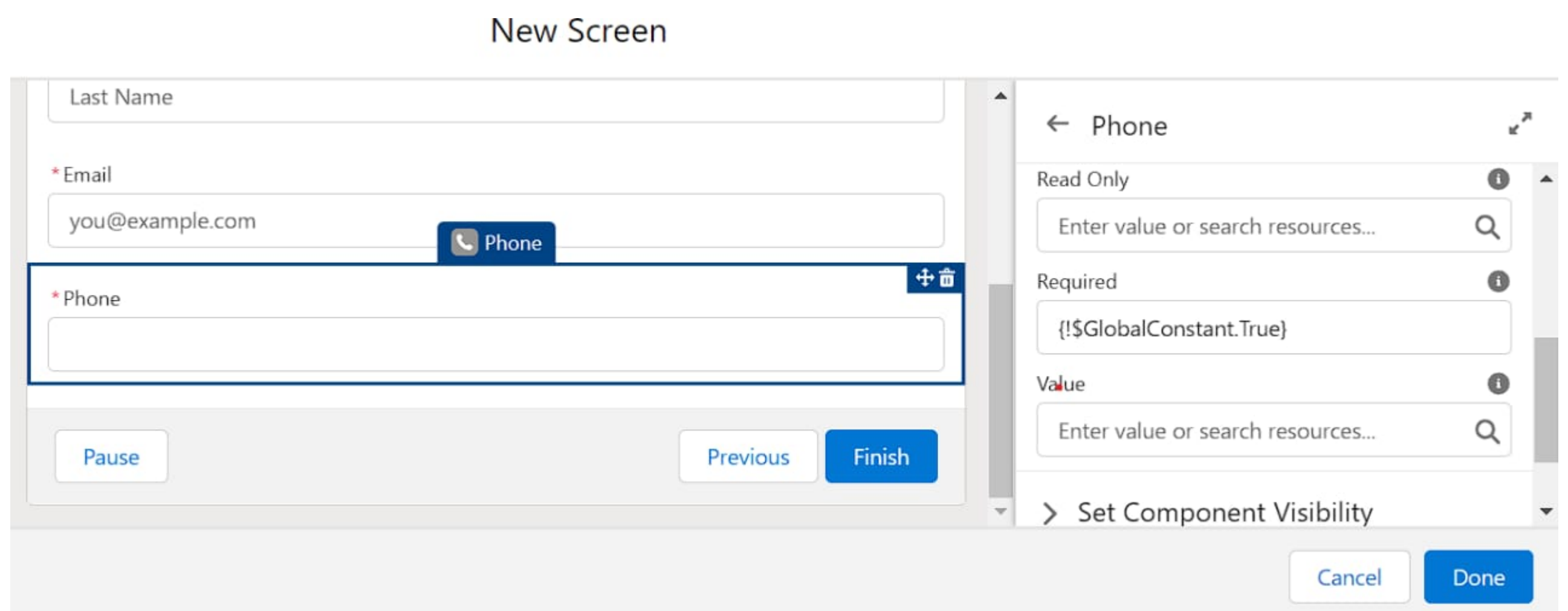
18. Now drag Email from component section and move it to the screen.

19. Give the Api name- Email Required - `{!$GlobalConstant.True}`



20. Now drag the Phone from component to screen below the email

21. Give the Api name as - Phone Required- `{!$GlobalConstant.True}`



22. Now Drag Address from component section to screen .

23. Give the Api name as –Address City  
Value-`!Get_Account_Record.ShippingCity`

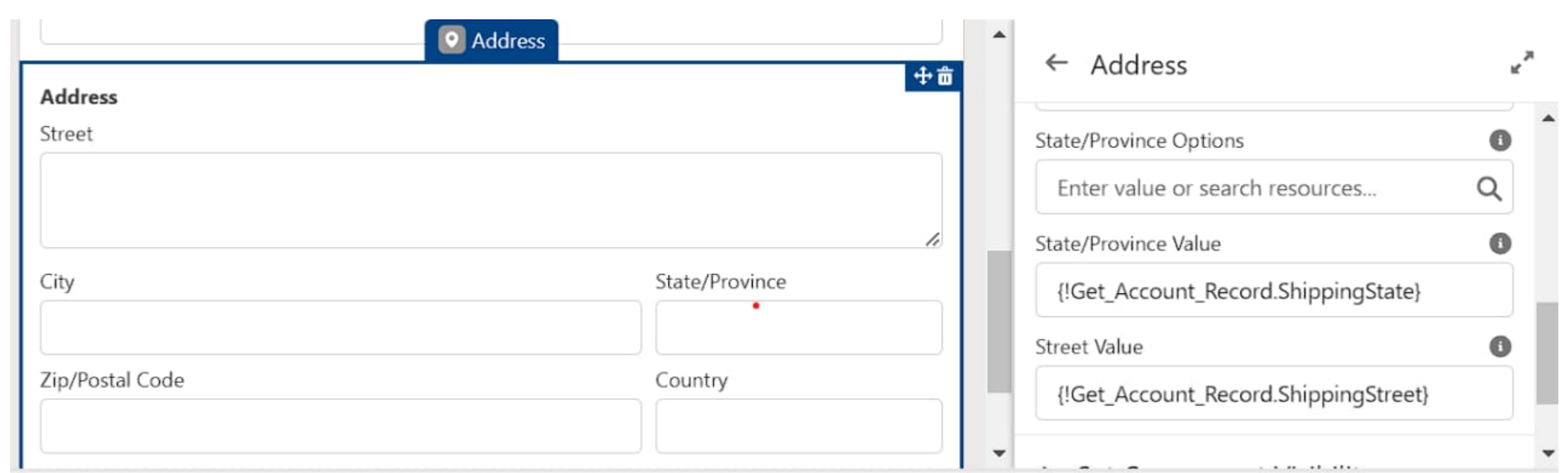
Country

Value-`!Get_Account_Record.BillingCountry`

Postalcode-`!Get_Account_Record.ShippingPostalcode`

State/province

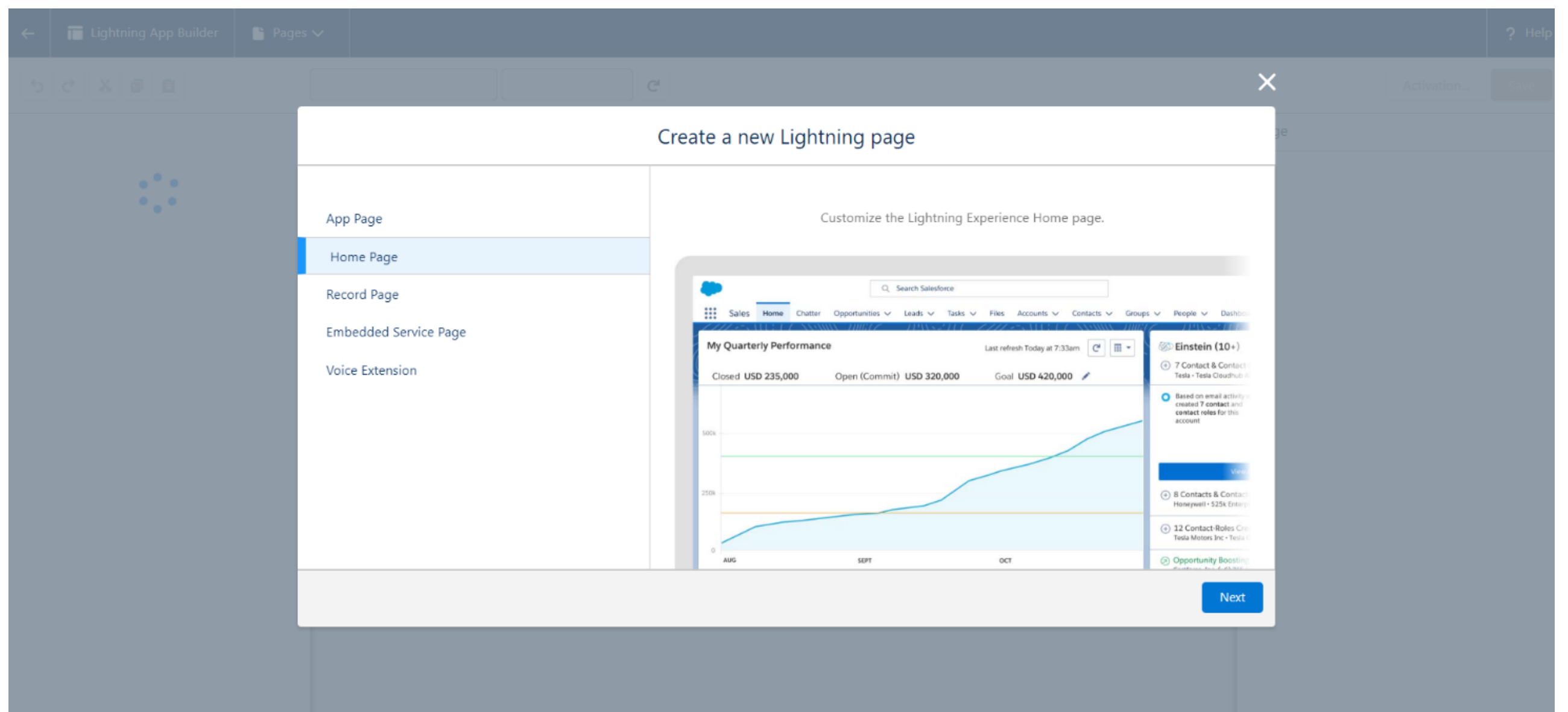
value-`!Get_Account_Record.ShippingStreet`



24. Click on done and save it. Give the label name as Get Account & Contact.

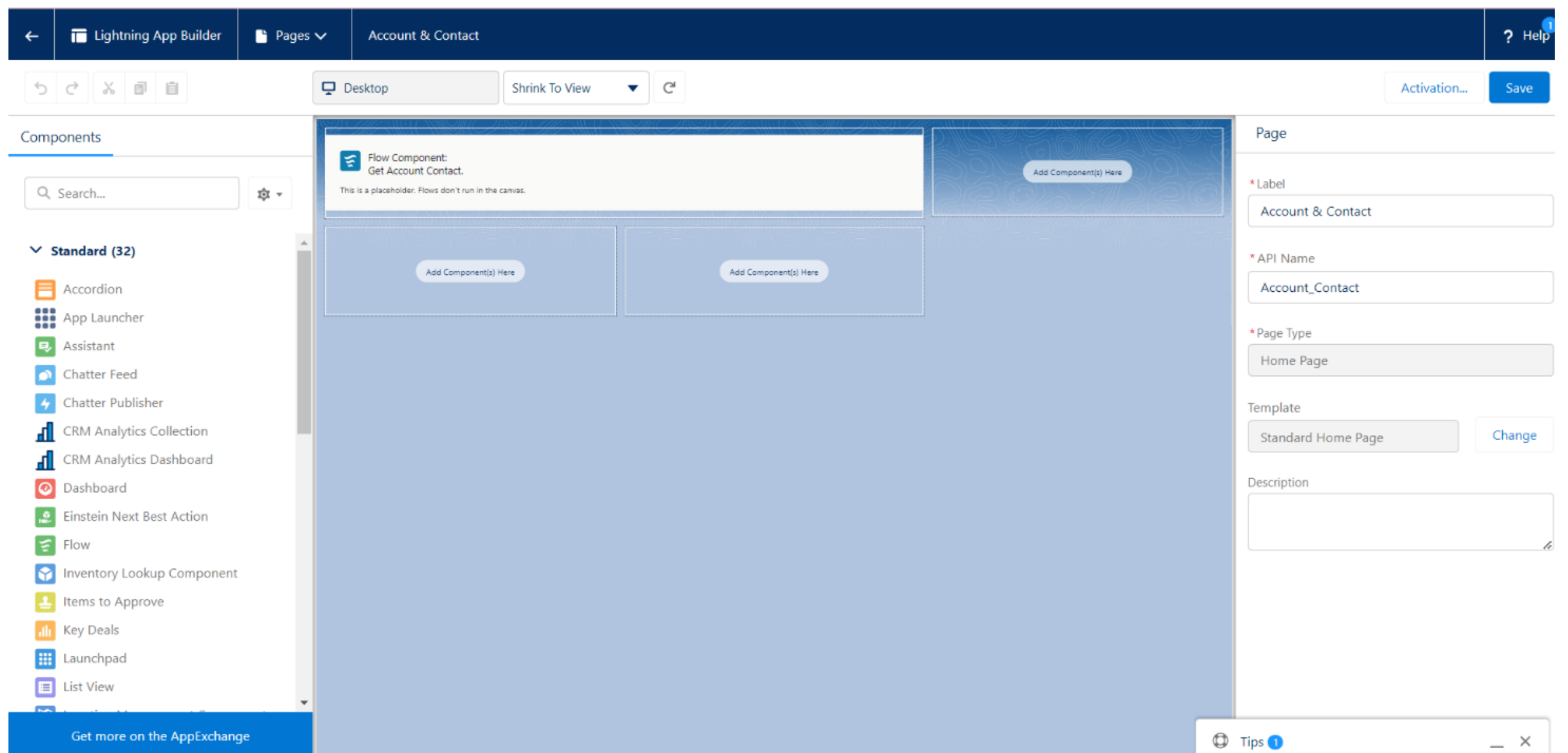
## To Create Lightning Home Page

1. Click on setup gear.
2. Now search for lightning App builder.
3. And select New option



4. In create a new lightning page select Home page.
5. Select Next
6. Give the label name - Account & Contact
7. Choose a standard home page.
8. Now in the component section select flow and drag down it to Corner of the page

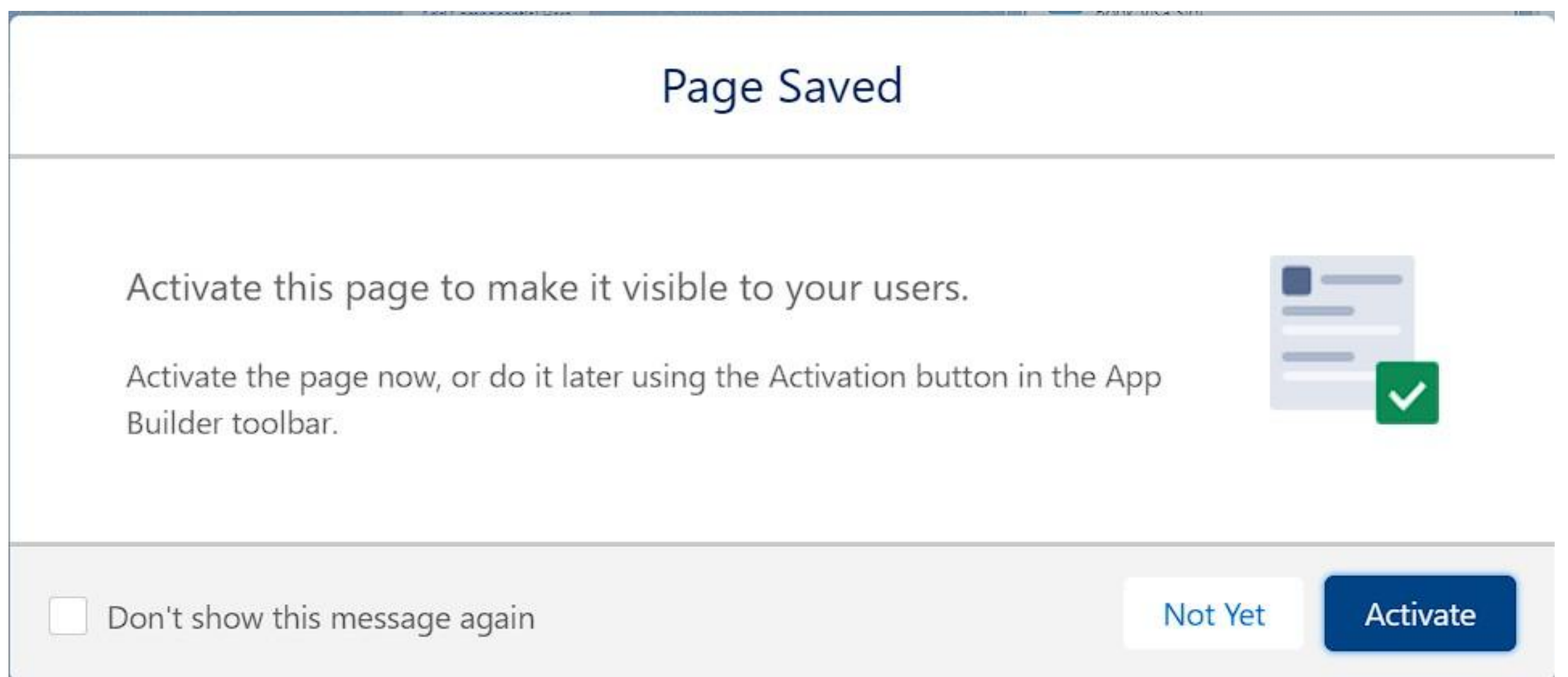




9. At the right side select the flow Get Account & Contact.

10. At the right side top of the page click on Save.

11. You will get the populate notification and click on activate.



12. you will get an activation pop up select App and profile.

13. Select Sales app in lightning app selection.

14. In profiles select System administrator, Standard user, Standard platform user.

15. Save it.

Profiles (48) <span>3 Selected</span>	
Profile	Description
<input type="checkbox"/> Smartbridge Help center Profile	
<input type="checkbox"/> Solution Manager	
<input checked="" type="checkbox"/> Standard Platform User	
<input checked="" type="checkbox"/> Standard User	
<input checked="" type="checkbox"/> System Administrator	
<input type="checkbox"/> Work.com Only User	

16.Now click on app launcher and search for Sales App

17.At the right side corner you can find a Pencil icon to personalize navigation click on that.

18.Click on add more items and in available items click on all and search for home.


19. Move the home page to top and click on save.

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.  
[Learn More](#) ⓘ

ⓘ 1 item added to your list. Save your updates.


NAVIGATION ITEMS (24) Add More Items

≡


 Home

×


≡

 Accounts


≡

 Campaigns

≡

 Contacts

≡



[Reset Navigation to Default](#) ⓘ

Cancel Save