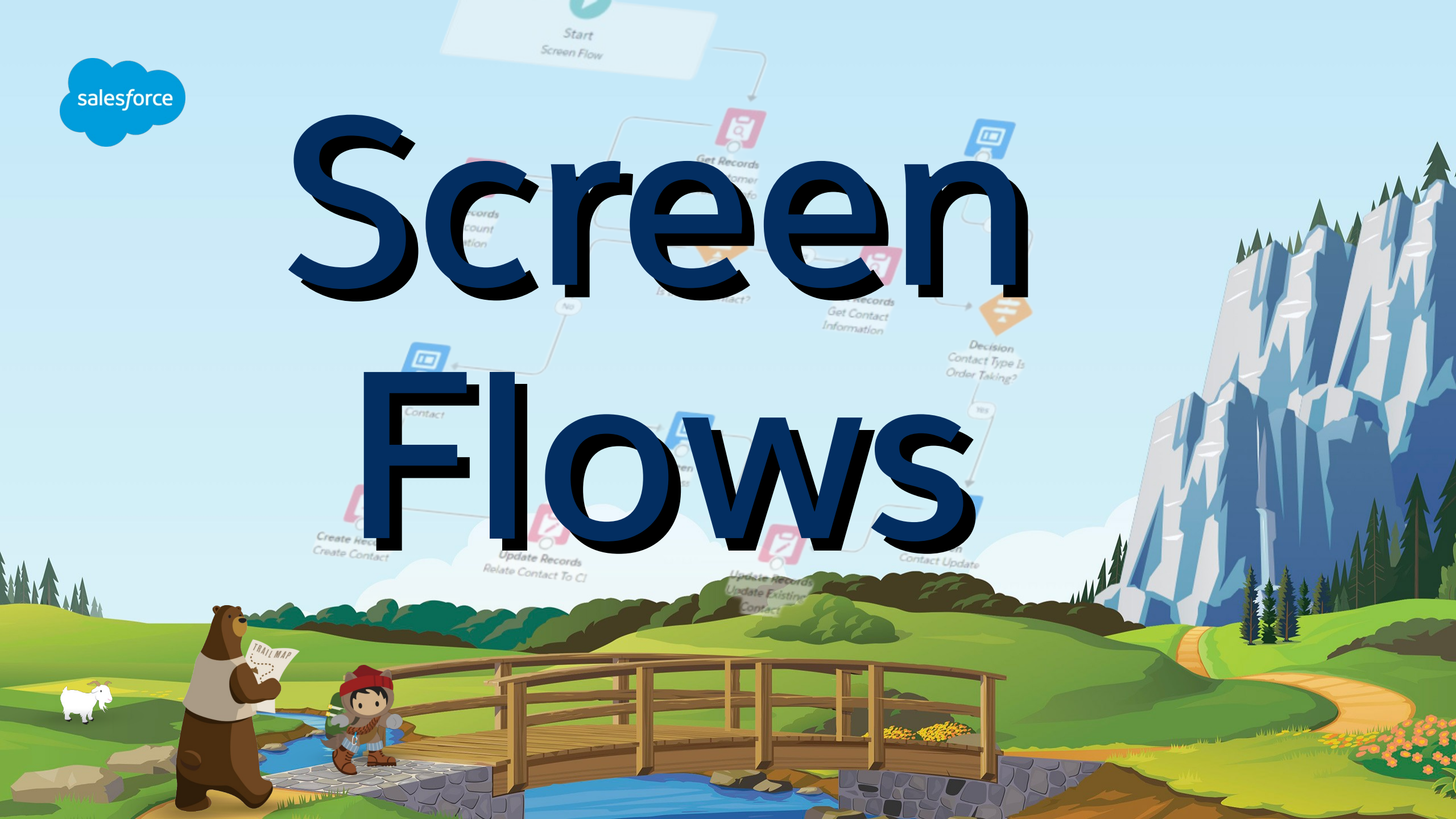


I LIED

I DON'T HAVE NETFLIX

salesforce

# Screen Flows



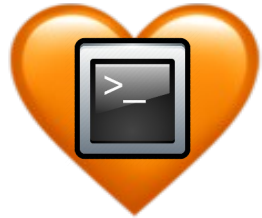
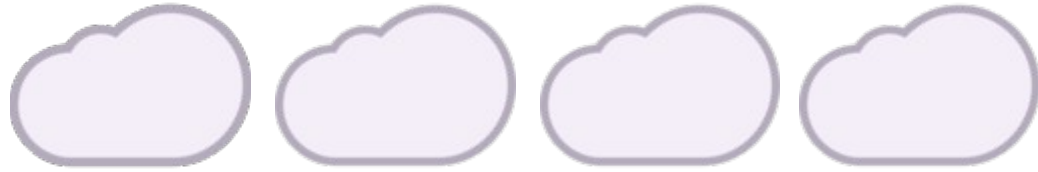
# Plan na dziś



1. Kim jestem 😊
2. Co to jest screen flow i czym się różni
3. Jakie są elementy, które możemy użyć
  - a) jak ich użyć
4. Jak i gdzie wyświetlić flow
5. DIY



# O prowadzącym

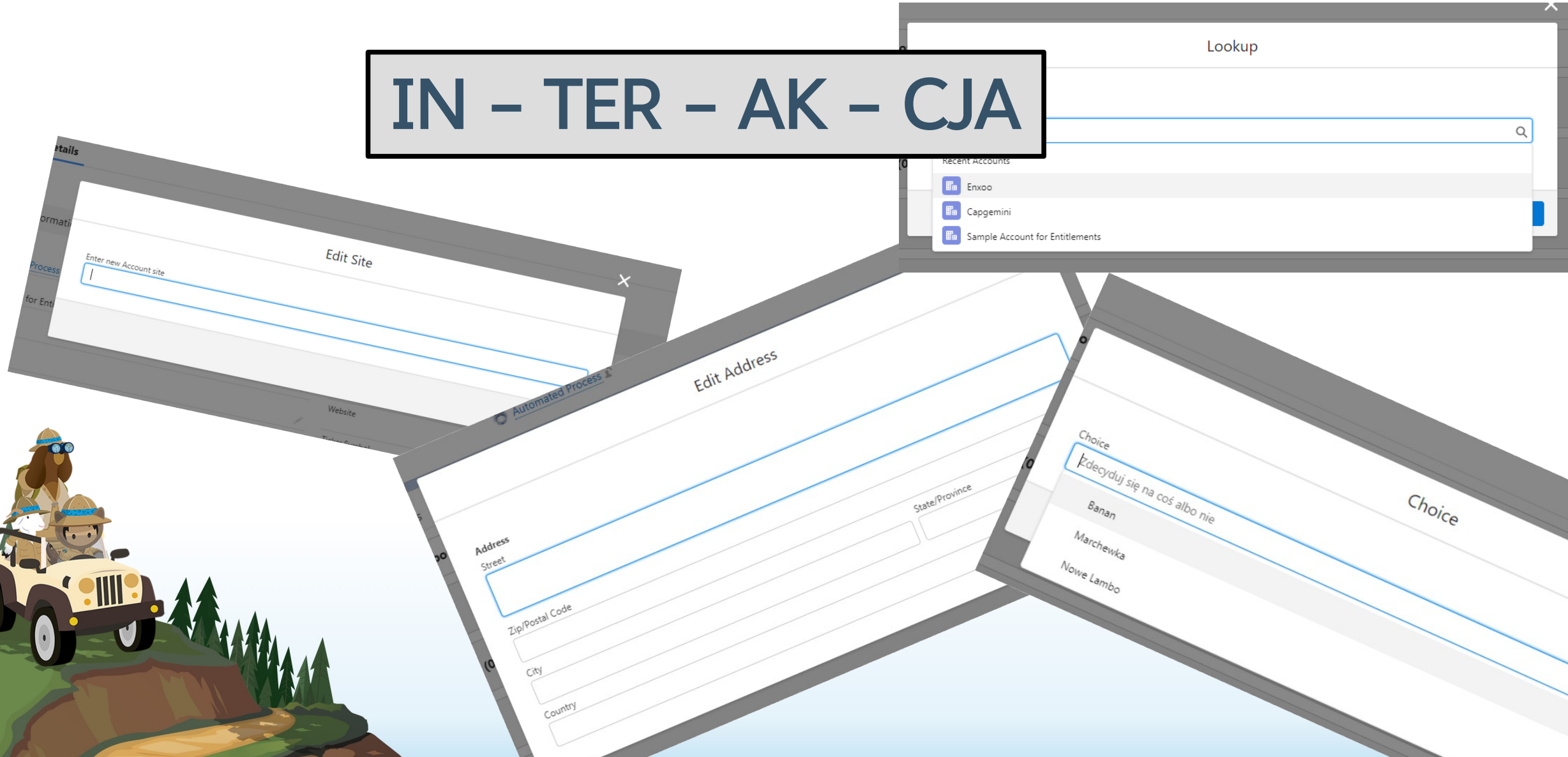




# Screen Flow – co to jest



IN – TER – AK – CJA




# Tworzenie




## New Flow

**Core** All + Templates




### Screen Flow

Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.




### Record-Triggered Flow

Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.




### Schedule-Triggered Flow

Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.




### Platform Event—Triggered Flow

Launches when a platform event message is received. This autolaunched flow runs in the background.



### Autolaunched Flow (No Trigger)

Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

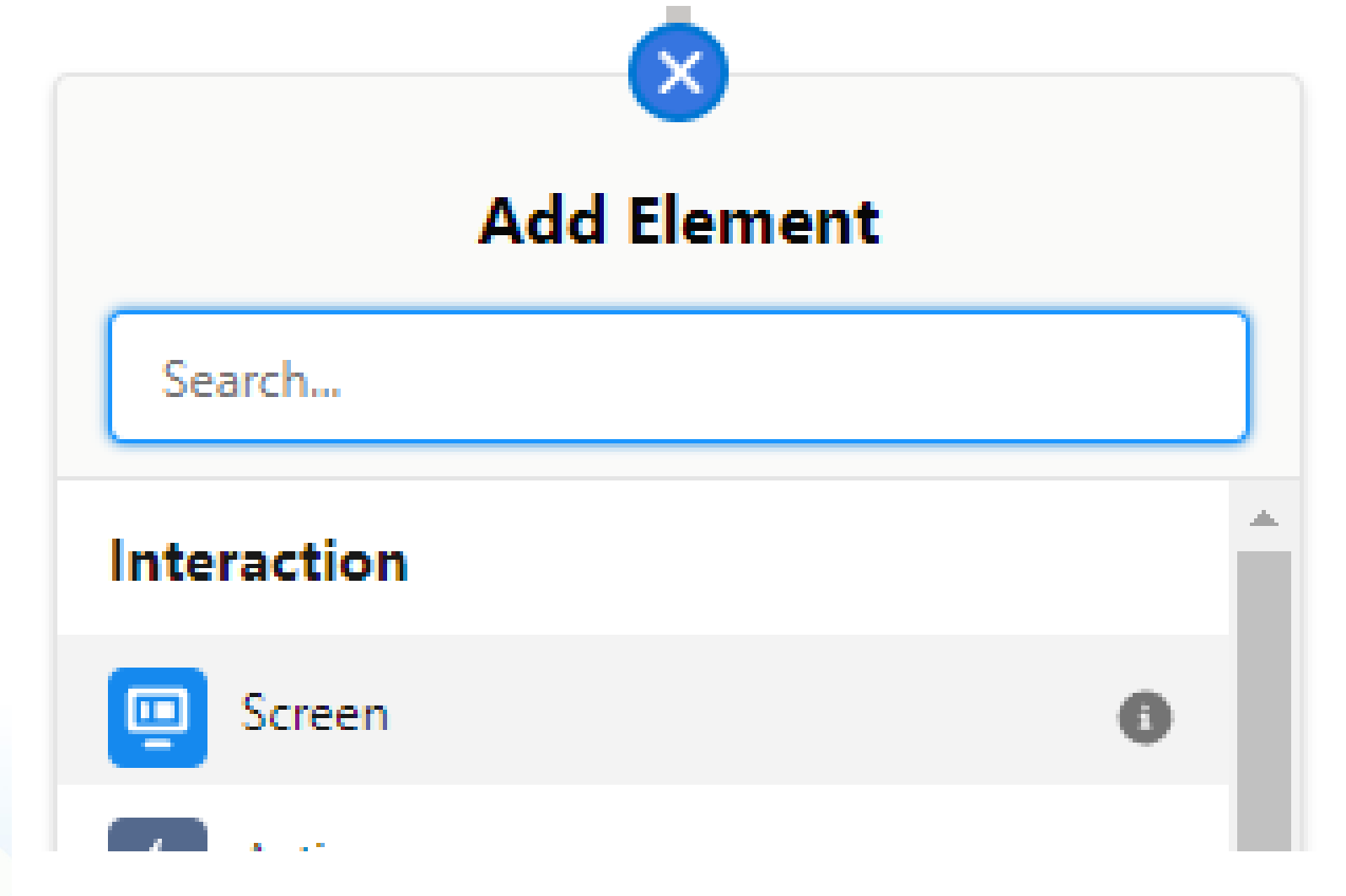


### Record-Triggered Orchestration

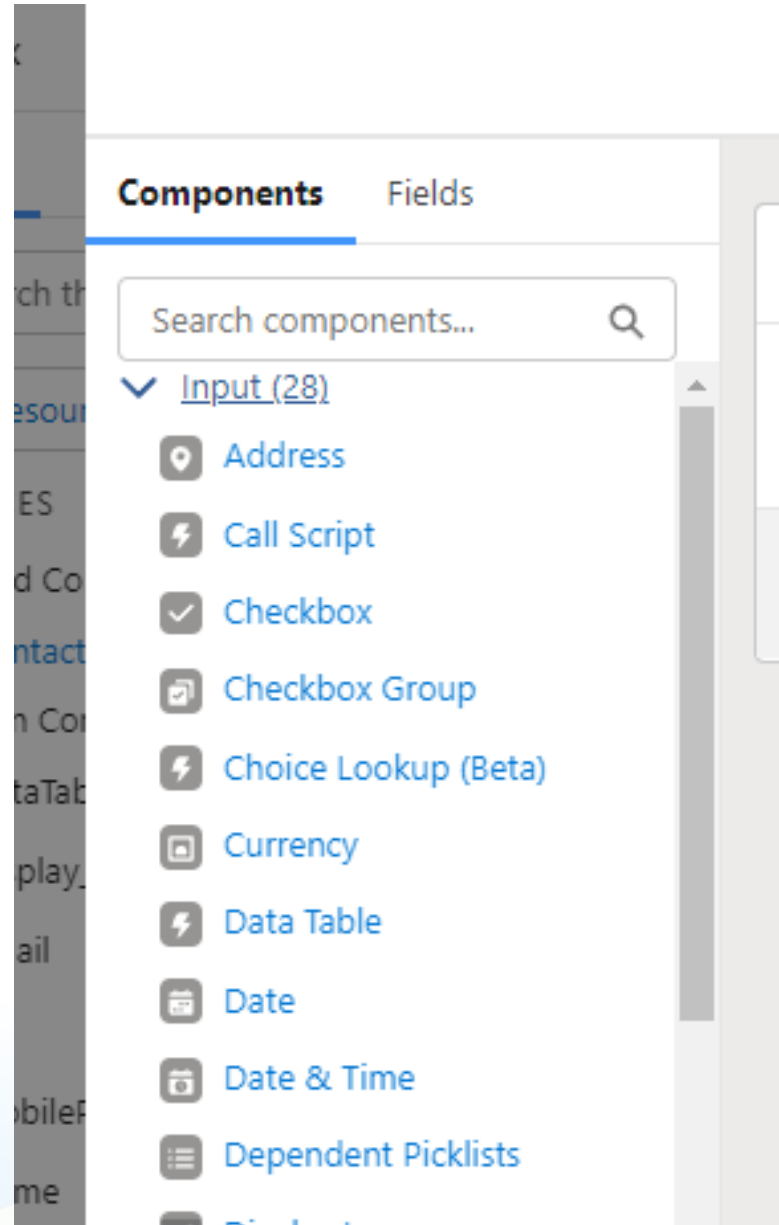
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

Create

# Tworzenie



# Tworzenie





# Tworzenie



×

Add Element

Search...

Interaction

Screen

ⓘ

Action

Subflow

Logic

Assignment

Decision

Loop

Collection Sort

Collection Filter

Data

Create Records

Update Records

Get Records

Delete Records

Roll Back Records

Collect information from or display information to a user who runs the flow.



# Text



## Components Overview

[Text]

Pause

Previous

Finish



# Pochodne



## Components Overview

Email

you@example.com

Phone

URL

Pause

Previous

Finish

# Address



**Components Overview**

**Address**

Street

Zip/Postal Code

City

State/Province

Country

Pause

Previous

Finish

# Wybór opcji

salesforce

Gdzie lubisz spędzać urlop

- ☐ Morze
- ☒ Góry
- ☒ Jezioro

Ile masz rąk?

- ☐ 0
- ☒ 1
- ☐ 2

Select Account

uni



Show All Results for "uni"



**United Oil & Gas Corp.**



**University of Arizona**



**United Oil & Gas, UK**



**United Oil & Gas, Singapore**



# Data Table



Account  
**Sample Account for Entitlements**

- + Follow
- Edit Site
- Edit Address
- Lookup

Type      Phone      Website      Account Owner  
 [User User](#)

Related      Details      **Opportunities**

<input type="checkbox"/> Close Date	<input type="checkbox"/> Name	<input type="checkbox"/> Stage	<input type="checkbox"/> Quantity
<input type="checkbox"/> 6 Jul 2023	Website Redesign	Proposal/Price Quote	1000
<input type="checkbox"/> 27 Jul 2023	Marketing Automation Software	Id. Decision Makers	2000
<input checked="" type="checkbox"/> 29 Jun 2023	Lead Generation Campaign	Qualification	3000
<input type="checkbox"/> 18 Oct 2023	Social Media Advertising	Perception Analysis	4000
<input type="checkbox"/> 21 Sep 2023	Email Marketing Campaign	Negotiation/Review	5000

# Upload file



## Upload File To Account (Screen Flow example)

Add file related to the Account

 Upload Files

Finish



# Opcje komponentów



New Screen

ComponentsFields

Search components...

Long Text Area

Lookup

Multi-Select Picklist

Name

Number

Password

Phone

Picklist

Radio Buttons

Slack Channel Selector

Slack Workspace Selector

Slider

Text

Toggle

URL

Display (2)

Get more on the AppExchange

[Flow Label]

Address

Street

City

Zip/Postal CodeState/Province

Country

Text

Pause

Previous

Finish

← Text

Label

\* API Name

Require

Default Value

Enter value or search resources...

> Set Component Visibility

> Validate Input

> Provide Help

Cancel

Done

# Walidacja

▼ Validate Input

Error Message

Insert a resource...

Q

Date you entered is invalid. It must be a date in the future.

▼

▼

■▼

B

I

U

≡

≡

≡

≡

≡

≡

≡

🔗

🖼️

I<sub>x</sub>

Formula

Insert a resource...

Q

{!Date\_Input} > TODAY()

# Walidacja



## Date Test

Enter date in future

01-May-2023



Date you entered is invalid. It must be a date in the future.

Next





# Walidacja



Date Test

---

**22 June 2023** is valid, thanks!

---

[Previous](#)

[Finish](#)



# Lookup

salesforce

Lookup

Select Account

Search Accounts...



Previous

Finish

← Lookup



\* API Name

Account

\* Field API Name



AccountId

\* Label



Select Account

\* Object API Name



Contact

Maximum Selections



# Data Table



## ▼ Configure Data Source

\* Source Collection ⓘ

 Opportunities from Get\_Opportunities ✕

## ▼ Configure Rows

### \* Row Selection Mode

- ☒ Multiple  
☐ Single  
☐ View only

*The component stores a collection of records from the selected rows as output.*

Minimum Selection

Maximum Selection

Default Selection

## ▼ Configure Columns

Account ID



Name



New column



### Column Options

Source Field

Type

☐ Custom column label

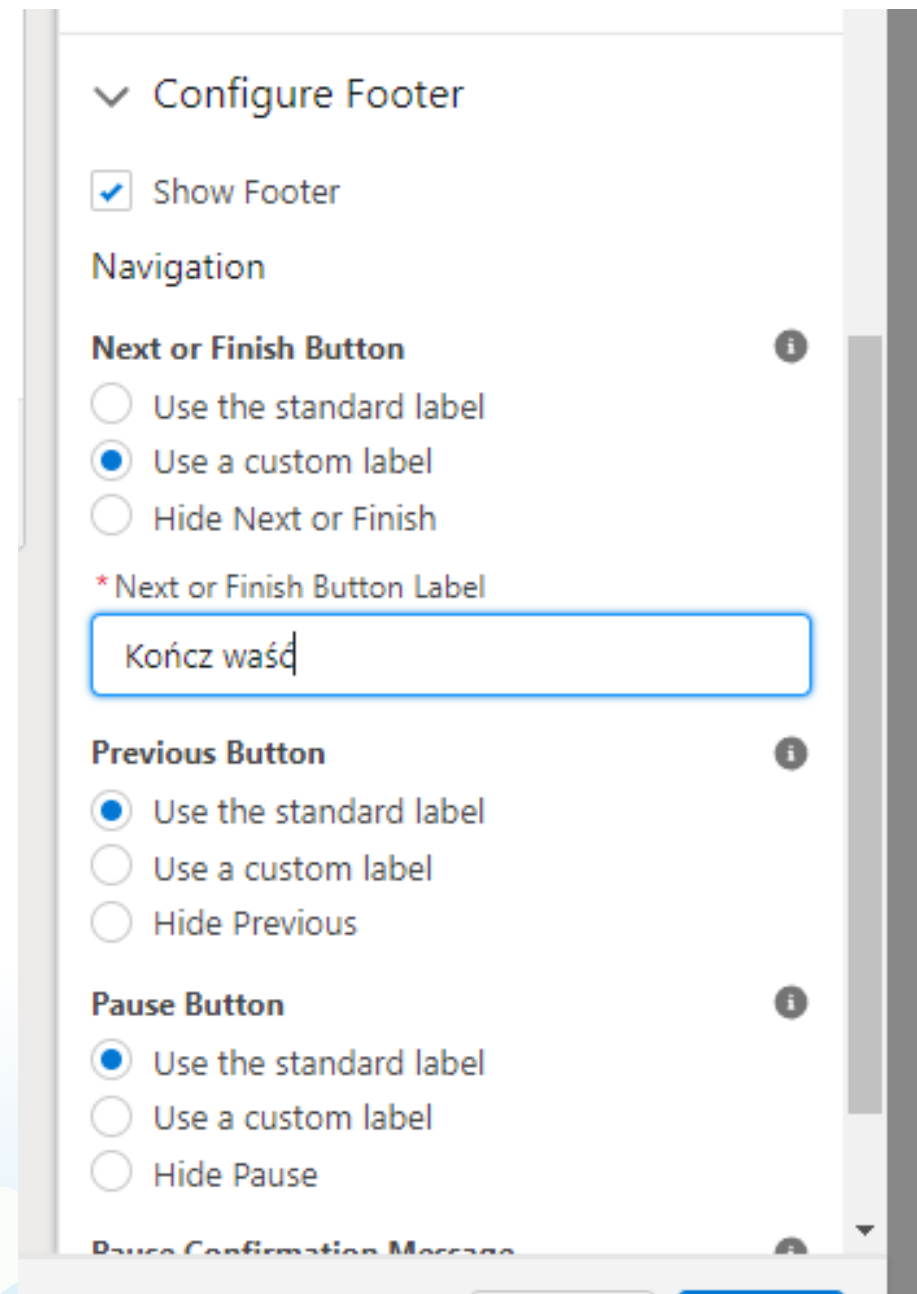
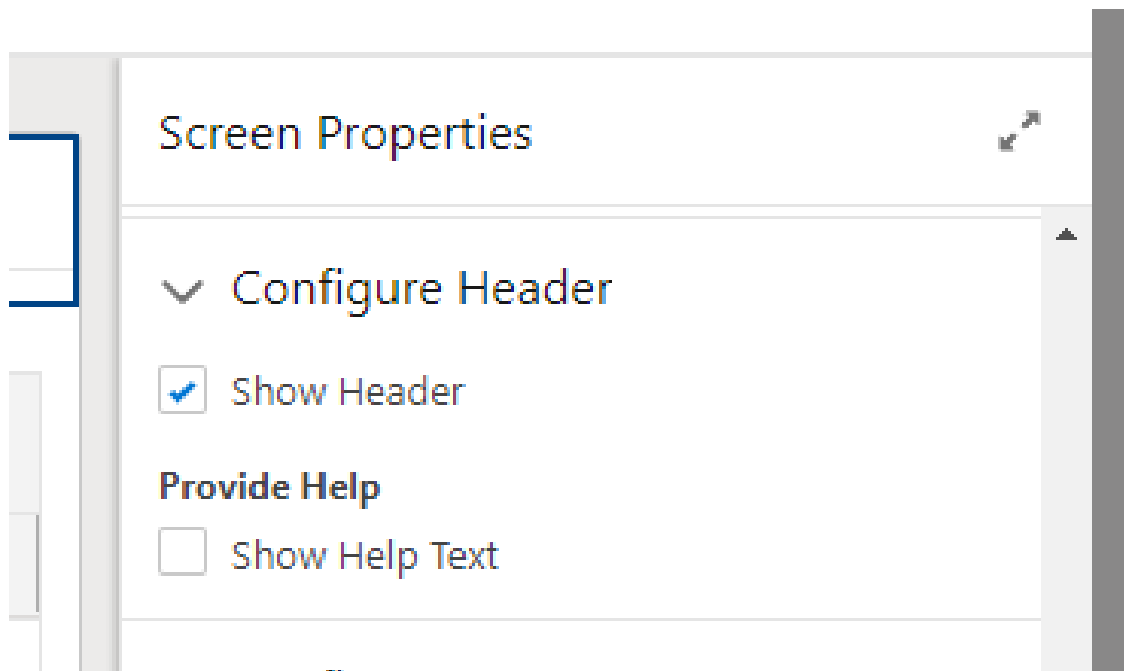
### Default Text Overflow Mode

- ☒ Wrap Text  
☐ Clip Text

Cancel

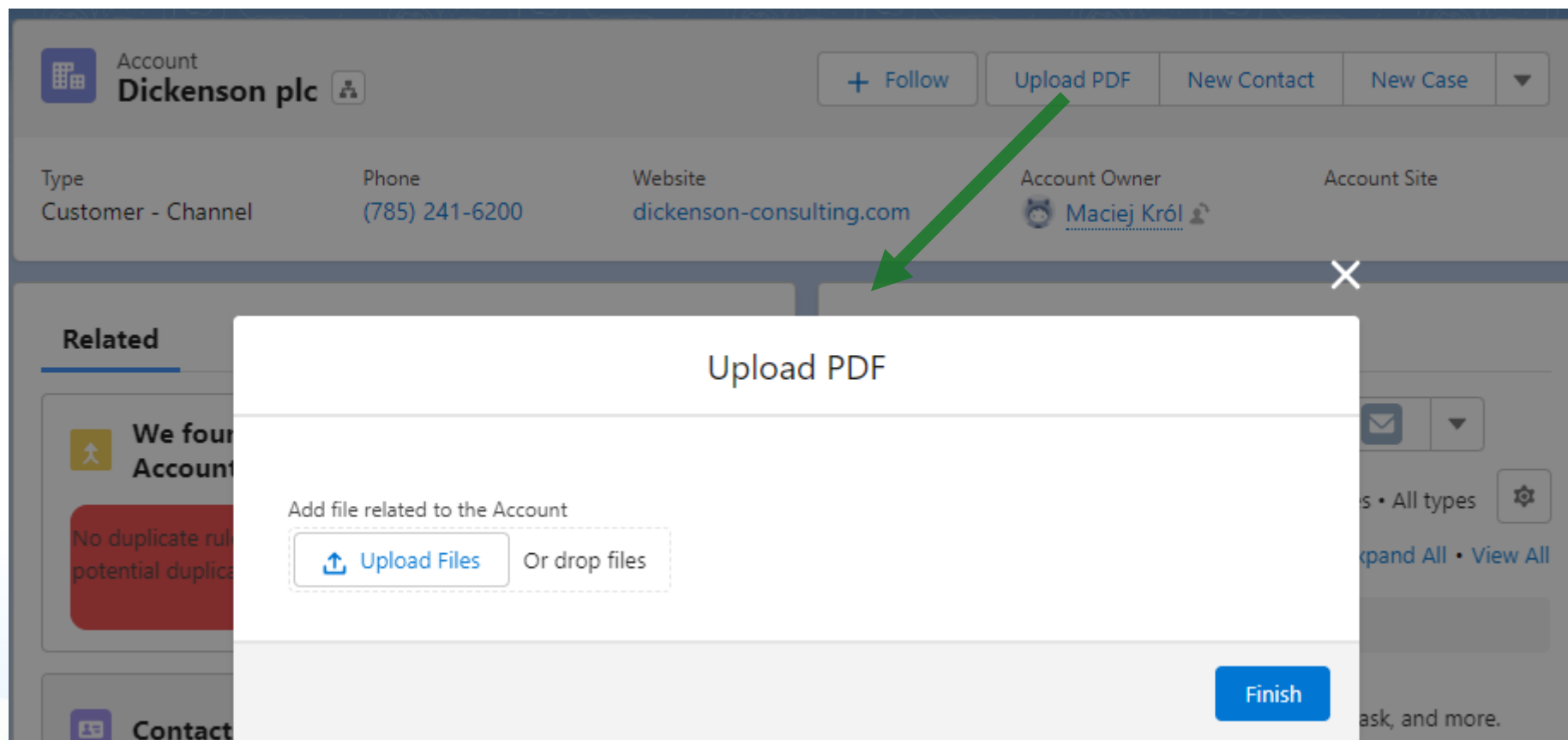
Done

# Nagłówek i stopka



# Wyświetlanie flow

## Quick Action





# Wyświetlanie flow



## Quick Action

Object Manager

→ Buttons, Links and Actions

→ New Action

Action Type → Flow

Label → *Wyświetlany na przycisku*

The screenshot shows the 'New Action' configuration window in Salesforce. At the top right are 'Save' and 'Cancel' buttons. The configuration fields are as follows:

- Object Name:** Account (with an information icon 'i')
- Action Type:** Flow (dropdown menu)
- Flow:** Upload File To Account (dropdown menu, with an information icon 'i')
- Standard Label Type:** --None-- (dropdown menu, with an information icon 'i')
- Label:** Upload PDF
- Name:** Upload\_PDF (with an information icon 'i')
- Description:** (empty text box, with an information icon 'i')
- Icon:** ⚡ [Change Icon](#)

At the bottom right are 'Save' and 'Cancel' buttons.

# Wyświetlanie flow

## Quick Action

Object Manager  
→ Layouts



Account Layout ▾

Save ▾ Quick Save Preview As... ▾ Cancel Undo Redo Layout Properties

Fields  
Buttons  
Custom Links  
Quick Actions  
**Mobile & Lightning Actions**  
Expanded Lookups  
Related Lists

Quick Find Mobile Action Name ✕

Add Contacts To C...	Change Record Type	Email
Add to Call List	Check for New Data	Email (mobile only)
Call	Delete	File
Change Owner	Edit	Get Contacts

Account Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher ⓘ

Post File New Task New Contact New Case

Salesforce Mobile and Lightning Experience Actions ⓘ

Post File New Task New Contact New Case



Upload PDF


Check for New Data Change Owner Include Offline Edit

Account Detail

# Wyświetlanie flow FlexiPage





 Account  
**Dickenson plc** 

[+ Follow](#) [Upload PDF](#) [New Contact](#) [New Case](#) 

Type  
Customer - Channel

Phone  
(785) 241-6200


Website  
[dickenson-consulting.com](#)


Account Owner  
 [Maciej Król](#) 



Account Site

Industry  
Consulting

**Related** Details News




 **We found no potential duplicates of this Account.**  
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.



 **Contacts (1)** [New](#)

 [Andy Young](#) 

Title: SVP, Operations  
Email: [a\\_young@dickenson.c...](#)



**Data Table Example**



Last Na... 	Email 	Mobile Phone
<input type="radio"/> Young	 <a href="#">a_young@dickenson.com</a>	(785) 265-5350



 



[Next](#)

**Activity** Chatter

# Wyświetlanie flow

## FlexiPage



Lightning App Builder Pages Account Record Page ? Help

Desktop Shrink To View Analyze Activation... Save

Components Fields

Search...

- Chatter Publisher
- Company Hierarchy
- CRM Analytics Collection
- CRM Analytics Dashboard
- Data.com Insights
- Dynamic Related List - Single
- Einstein Next Best Action
- Event Insights
- Flow**
- Flow Orchestration Work Guide
- Highlights Panel
- Launchpad
- List View

Account Dickenson plc

Type Customer - Channel Phone (785) 241-6200 Website dickenson-consulting.com Account Owner Maciej Król Account Site Industry Consulting

Related Details News

Insufficient permissions

You don't have user access to view this component.

We found no potential duplicates of this Account.

No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Contacts (1)

Andy Young

Title: SVP, Operations

Email: a\_young@dickenson.com

Phone: (785) 241-6200

View All

Opportunities (1)

Dickenson Mobile Generators

Flow Component: Data Table Example

This is a placeholder. Flows don't run in the canvas.

Activity Chatter

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.

Page > Flow

Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.

\* Flow

Data Table Example

Edit Flow in Flow Builder

Layout

One Column

Optionally, enter values for these flow variables. Only variables that allow input access are supported.

recordId

{!Record.Id}

☒ Pass record ID into this variable

# recordId

### New Resource

\* Resource Type

Variable

\* API Name

recordId

Description

\* Data Type

Text

☐ Al mul val(col) ⓘ

Default Value

Enter value or search resources... 🔍

Availability Outside the Flow

☒ Available for input

☐ Available for output

Cancel

Done

Lightning App Builder

Pages ▾

Account Record Page

? Help 3

Analyze

Activation...

Save

Page > Flow

Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.

\* Flow ⓘ

Data Table Example ×

Edit Flow in Flow Builder ↗

Layout ⓘ

One Column ×

Optionally, enter values for these flow variables. Only variables that allow input access are supported.

recordId

{!Record.Id}

☒ Pass record ID into this variable

Set Component Visibility

Filters

+ Add Filter

+ Follow

Upload PDF

New Contact

New Case ▾

Industry

Consulting

Flow Component: Data Table Example

This is a placeholder. Flows don't run in the canvas.

Activity

Chatter

Filters: All time • All activities • All types ⚙

Refresh • Expand All • View All



# LWC



1. Tworzenie customowych elementów do Screen Flow
2. Uruchamianie Flow z poziomu LWC

```
1 <template>
2   <lightning-flow if:true={singleAccount} flow-api-name='Update_Account_Triggered_By_LWC'
3     flow-input-variables={inputVariables} onstatuschange={handleStatusChange}>
4   </lightning-flow>
5 </template>
```

HTML



BETA  
VERSION

# Reactive Components



Setup →

Process Automation Settings →

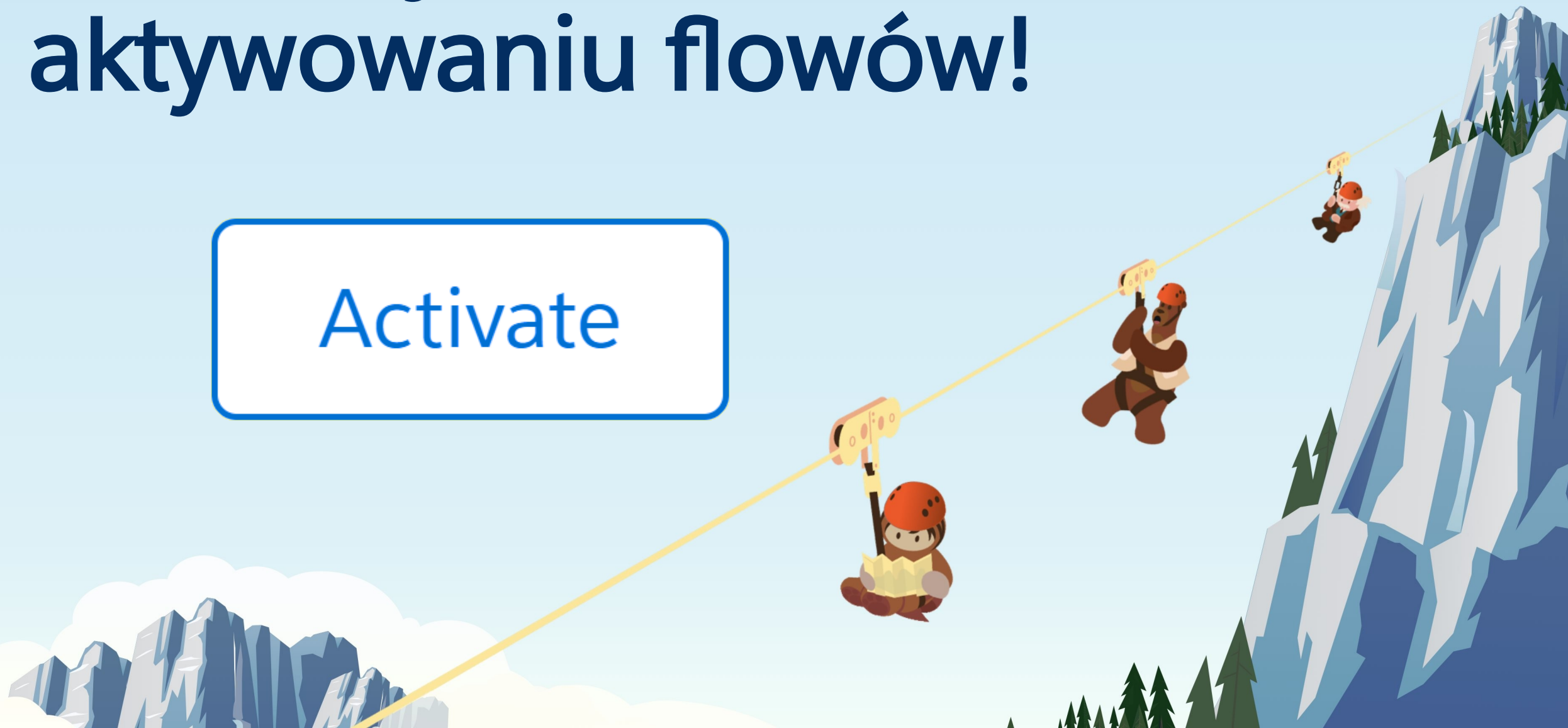
Opt in to Reactive Screens Beta



# Pamiętajcie o aktywowaniu flowów!

salesforce

Activate



# Do it yourselves

salesforce

Use case'y: [bit.ly/sf-uc](https://bit.ly/sf-uc)

Prezentacja: [bit.ly/sf-pr](https://bit.ly/sf-pr)

Tutorial: [bit.ly/sf-t](https://bit.ly/sf-t)





thank you

