1. Since the flow will launch on Account and all the cases should be linked to it, we create a recordId variable to fetch the Account information.
2. We will use this Case record variable to store the user input, and create the parent or child cases using this variable.
3. To track how many cases we have created, we can create a counter variable. Once a case is added, we add one to the counter.
4. If Counter is one, we are creating the parent case. Otherwise, it will be a child case. We can put this formula on the Screen element, so your users can be reminded of what type of cases they are creating at the moment.
5. If all the cases should share the same values for some specific fields (Ex. AccountId), assign them first before the Screen element.
6. Utilize the Fields feature and add the Case record variable. Drag the fields you need the users to fill in. Add another checkbox – Create More Case to let users decide whether another case is needed. Use the Counter and formula resource to create a user-friendly title. Finally, uncheck the “Previous” to prevent errors.
7. Based on the illustration, we have four different outcomes. Use the Counter and the “Create More Case” checkbox to write the conditions for each outcome. Use the default outcome for the last one.
8. Outcome 1: Create Parent Case -> End If it is the first case and no more case is needed, use a Create Records and the Case record variable to create the parent case.
9. Outcome 2: Create Parent Case -> Continue Even though we will create more cases, since we need the Parent Case Id, we still need to create this case first. This is a CLONE of step .8
10. Outcome 2: Create A Text Variable To Store Parent Id Once the case is created, the Id field for the case record variable will be populated. But since the Case record variable that we created from step 2 will be overwritten again and again, we need to save the first Case Id with another variable. This will be considered as the Parent Case Id.
11. Outcome 2: Save The Parent Id As mentioned in the previous step, update the text variable with the Case Id from the Case record variable.
12. Outcome 2: Counter add And Link Back To Screen Add one to the Counter so the flow knows we are creating Child Cases after the first case. Remember to link this element back to the Screen! (Note: You can combine this into step11 and link step11 back to Screen)
13. Outcome 3: Update Parent Case Id If outcome3 is reached, it means the user has finished the screen for another time and the Case record variable is updated to the newest case. The only thing we need to do is to update the Parent Id using the text variable we created. It is also recommended to clean up the Case Id.
14. Outcome3 : Create A Collection To Store Child Cases Since there can be several child cases (unlike parent case is only one), we create a collection to store them, and create them all together.
15. Outcome 3: Add Child Case To Collection Add the current child case to the collection.
16. Outcome 3: Counter add 1 And Link Back To Screen Link step15 to step12 . Add one to the Counter so the flow knows we are creating Child Cases after the first case. Remember to link this element back to the Screen! (Note: You can combine this into step15 and link step15 back to Screen)
17. Outcome 4: Update Parent Case Id update the Parent Id using the text variable we created and clean up the Case Id. This is a CLONE of step13
18. Outcome 4: Update Parent Case Id Add the current child case to the collection. This is a CLONE of step15
19. Outcome 4: Create All Child Cases Since no more case is needed, we can create all the child cases using the collection variable. The flow ends here.
20. Activate The Flow And Create Action Create an Action with the Screen flow that we just created and activated. Remember to put it on the page layout