

Visual flows

Flows specifics

- Automation tool with step wise actions that can be setup to implement a business process.
- Flows are triggered by user action or also can be automated
- Flows can collect information from user,query the database,update ,delete and save records on single or multiple objects
- They can also invoke apex classes
- Design flow using cloud designer, no code

Key parts of flows

- Each element represents an action that the flow can execute. Examples include reading or writing Salesforce data, displaying information to and collecting data from flow users, executing logic, or manipulating data.
- Each connector defines an available path that the flow can take at run time.
- Each resource represents a value that you can reference throughout the flow.

Flow elements

Flow Call Apex Element

Calls an Apex class's invocable method.

Flow Apex Plug-In Element

Calls an Apex class that implements the Process.Plugin interface. If you used the Tag property in the PluginDescribeResult class, the Apex class appears under a customized section. Otherwise, it appears under the Apex Plug-ins section.

Flow Assignment Element

Sets or changes values in variables, collection variables, sObject variables, and sObject collection variables.

Flow elements

- **Flow Local Action Element**
Executes JavaScript by calling a Lightning component's client-side controller. For example, a local action can look up third-party data without going through Salesforce servers, automatically open another URL, or fire a toast message.
- **Flow Loop Element**
Iterates through a collection one item at a time, and executes actions on each item's field values—using other elements within the loop.
- **Flow Record Create Element**
Creates one Salesforce record by using individual field values that you specify.
- **Flow Record Delete Element**
Deletes all Salesforce records that meet specified criteria.
- **Flow Record Lookup Element**
Finds the first Salesforce record that meets specified criteria. Then assigns the record's field values to individual flow variables or individual fields on sObject variables.
- **Flow Record Update Element**
Finds all Salesforce records that meet specified criteria and updates them with individual field values that you specify.
- **Flow Quick Action Element**
Calls an object-specific or global quick action that's already been configured in your organization. Only "Create," "Update," and "Log a Call" actions are supported.
- **Flow Post to Chatter Element**
Posts a message to a specified feed, such as to a Chatter group or a case record. The message can contain mentions and topics, but only text posts are supported.
- **Flow Screen Element**
Displays a screen to the user who is running the flow, which lets you display information to the user or collect information from the user.
- **Provided Flow Screen Components**

Flow elements

- **Flow Decision Element**
Evaluates a set of conditions and routes users through the flow based on the outcomes of those conditions. This element performs the equivalent of an if-then statement.
- **Flow Email Alert Element**
Sends an email by using a workflow email alert to specify the email template and recipients. The flow provides only the record ID.
- **Flow Fast Create Element**
Creates Salesforce records using the field values from an sObject collection variable. Or creates one Salesforce record using the field values from an sObject variable.
- **Flow Fast Delete Element**
Deletes Salesforce records using the ID values that are stored in an sObject collection variable. Or deletes one Salesforce record using the ID value that's stored in an sObject variable.
- **Flow Fast Lookup Element**
Finds Salesforce records to assign their field values to an sObject collection variable. Or finds one Salesforce record to assign its field values to an sObject variable.
- **Flow Fast Update Element**
Updates Salesforce records using the field values from an sObject collection variable. Or updates one Salesforce record using the field values from an sObject variable. If a record's ID is included in the variable, its field values are updated to match the other values that are stored in the variable.

Flow Resource

- [Choice](#) Represents an individual value that can be used in choice screen fields.
- [Collection Variable](#) Stores multiple updatable values that have the same data type, such as a group of email addresses.
- [Constant](#) Stores a fixed value.
- [Dynamic Record Choice](#) Represents a set of choices that's generated from an object's records. Any element that you add to the flow is available as a Resource with the was visited operator in [outcome](#) criteria. An element is considered visited if the element has already been executed in the flow interview. Any element that you add to the flow that supports a [fault connector](#) is available as a Boolean resource.
- If the element has already been successfully executed in the flow interview, the resource's value is True. If the element wasn't executed or was executed and resulted in an error, the resource's value is False.

Flow resource

- [Formula](#)Calculates a value by using other resources in your flow and Salesforce functions
- [Global Constant](#)Fixed, system-provided values, such as EmptyString, True, and False, that can be assigned as the values of flow resources.
- [Global Variables](#)System-provided variables that reference information about the organization or running user, such as the user's ID or the API session ID. In Cloud Flow Designer, global variables are available in only flow.
- [SObject Collection Variable](#)Stores updatable field values for one or more Salesforce records.
- [SObject Variable](#)Stores updatable field values for a Salesforce record.
- [Stage](#)Represents the user's progress through the flow.
- [System Variable](#)Provides information about the running interview. Some variables contain system-provided values. You can update the other variables throughout the flow by using Assignments.
- [Text Template](#)Stores formatted text
- [.Variable](#)Stores a value that can be updated as the flow executes.
- [Wait Event](#)If you add a Wait element to the flow, its events are available as Boolean resources. If an event's waiting conditions are met, the resource's value is True. If the event has no waiting conditions set, the resource's value is always True.

Flow REsources

- [Outcome](#) If you add a Decision element to the flow, its outcomes are available as Boolean resources. If an outcome path has already been executed in the flow interview, the resource's value is True.
- [Picklist Choice](#) Represents a set of choices that's generated from the values of a picklist or multi-select picklist field. Picklist Values System-provided values for picklist fields in sObject variables and sObject collection variables. Available for only Assignment and Decision elements
- [.Screen Field](#) Any screen field that you add to the flow is available as a resource. The resource value depends on the type of screen field. The value for a screen input field is what the user enters. The value for a screen choice field is the stored value of the choice that the user selects. The value for a screen output field is the text that's displayed to the user

Use case

- When a customer's call is routed to the appropriate agent based on the loan type, the agent completes the loan application in the
- following way.
- 1. The agent verifies the loan type and gathers basic information, such as the customer's name and phone number.
- 2. The agent requests information that's needed to obtain the customer's credit score. Obtaining the credit score is a required step.
- 3. The agent follows a series of other steps to process the loan application.
- 4. When the application is processed successfully, the agent submits it for approval.
- 5. When the loan application is approved, the loan is sent for disbursement.
- 6. The agent wraps up the loan application process, and logs the call.

Flows exposed via

- Flow actions
- Lightning pages
- Lightning community pages
- Custom Aura components
- Custom Lightning web components
- Custom buttons or custom links
- Web tabs
- Direct flow URLs
- Visualforce pages
- Lightning Out
- Embedded Service deployments

Automation- non user triggered flows

- Processes
- Custom Apex classes
- REST API
- Web tabs
- Custom buttons or custom links
- Visualforce pages