1. [Lightning Flow]
2. [Guide Users Through Your Business Processes with Flow Builder]

Guide Users Through Your Business Processes with Flow Builder

Learning Objectives

After completing this unit, you'll be able to:

- Define a flow and list its key components.
- Describe the types of flow elements.
- Build a flow that creates a record and uploads files.

Get Started with Flow Builder

You may have heard several terms used interchangeably when referring to flows. As a reminder, the official terms are:

- **Lightning Flow**—the product that encompasses building, managing, and running flows and processes.
- **Flow Builder**—a point-and-click tool for building flows.
- **Flow**—an application that automates a business process by collecting data and doing something in your Salesforce org or an external system.

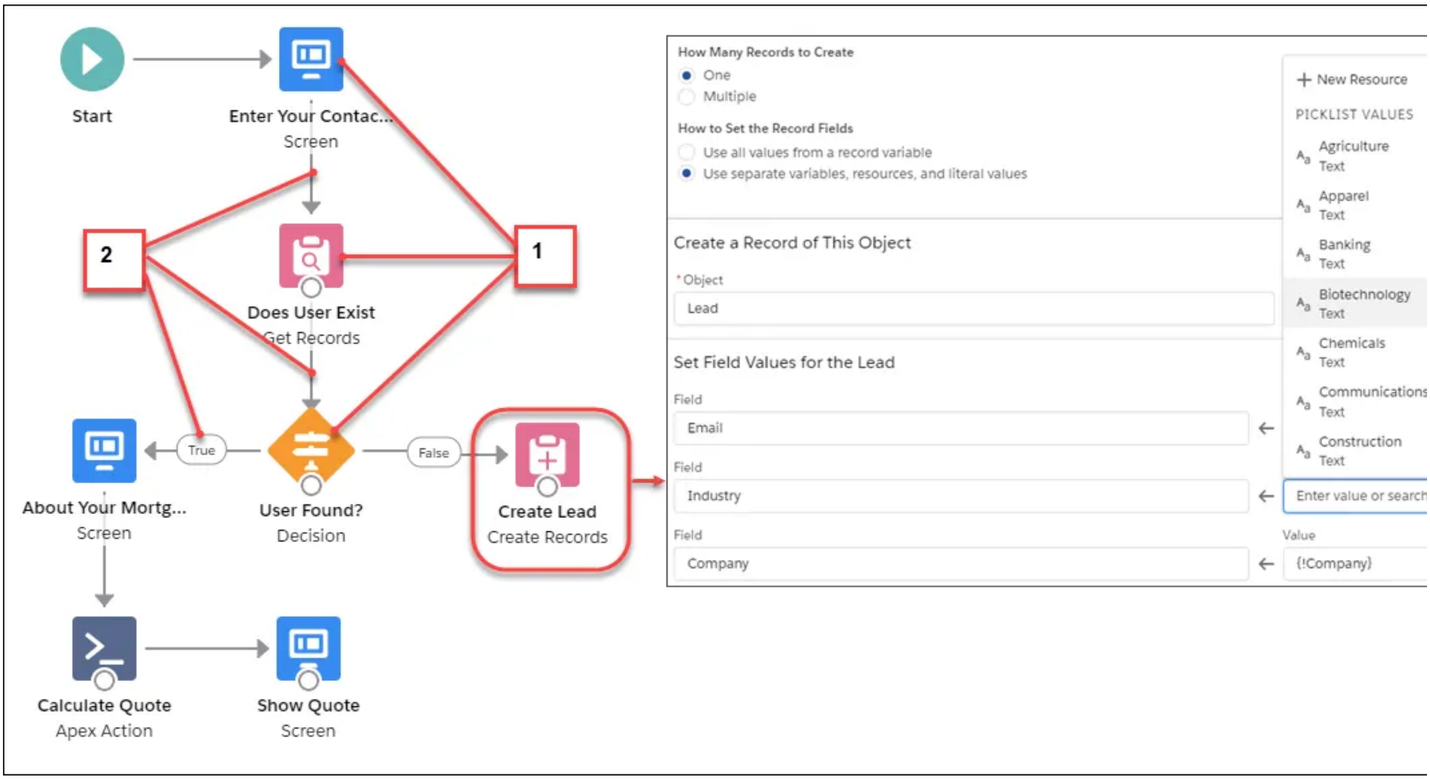
In short, the *Lightning Flow* product includes a couple of tools. One of them, *Flow Builder*, lets you create *flows*.

Beyond the Basics

You may also have heard of features called *Cloud Flow Designer* or *Visual Workflow*. Cloud Flow Designer has been replaced by Flow Builder, a much faster tool that streamlines flow building and maintenance with a simplified user interface. Visual Workflow is a retired feature for designing, managing, and running flows. Visual Workflow has also been superseded by Lightning Flow.

Flow Building Blocks

Every flow is made up of three building blocks.

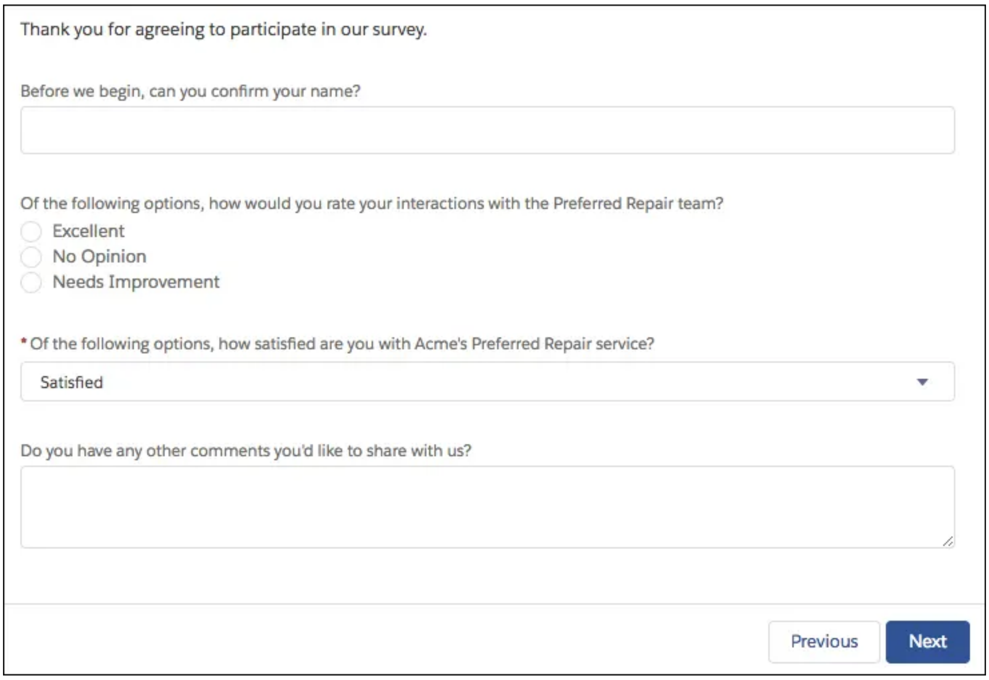


- *Elements* (1) appear on the canvas. To add an element to the canvas, click it or drag it there from the toolbox.
- *Connectors* (2) define the path that the flow takes at runtime. They tell the flow which element to execute next.
- *Resources* (3) are containers that represent a given value, such as field values or formulas. You can reference resources throughout your flow. For example, look up an account's ID, store that ID in a variable, and later reference that ID to update the account.

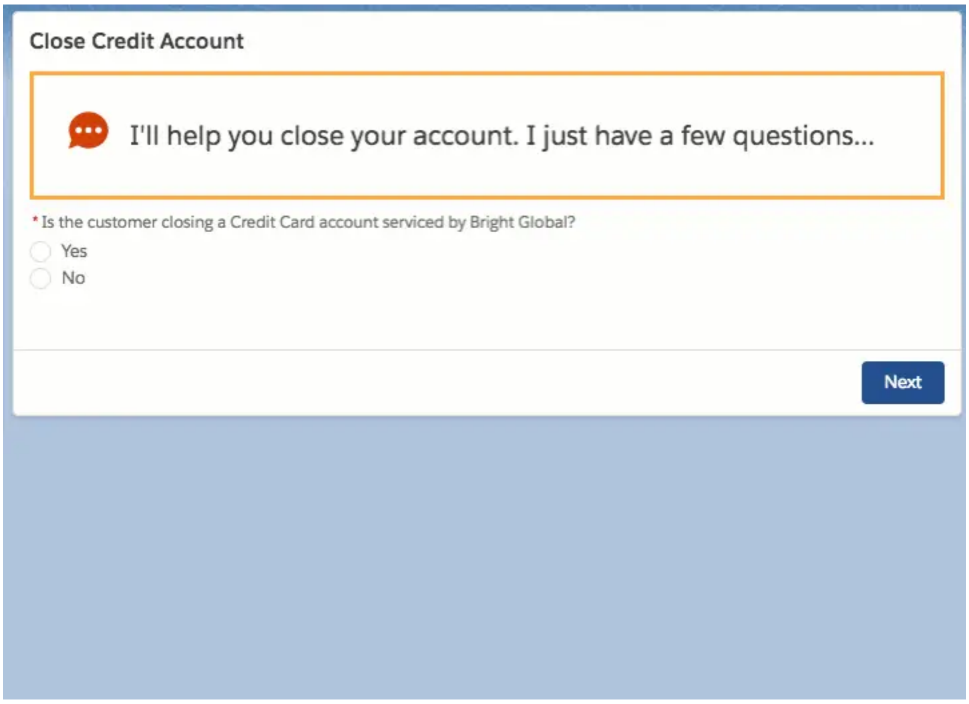
Flow elements fit into four different categories.

Screen

Display data to your users or collect information from them with Screen elements. You can add simple fields to your screens, like input fields and radio buttons as well as out-of-the-box Lightning components like File Upload.



If you need more out of your flow screens, like custom navigation or information displayed in table format, build or install custom Lightning components.



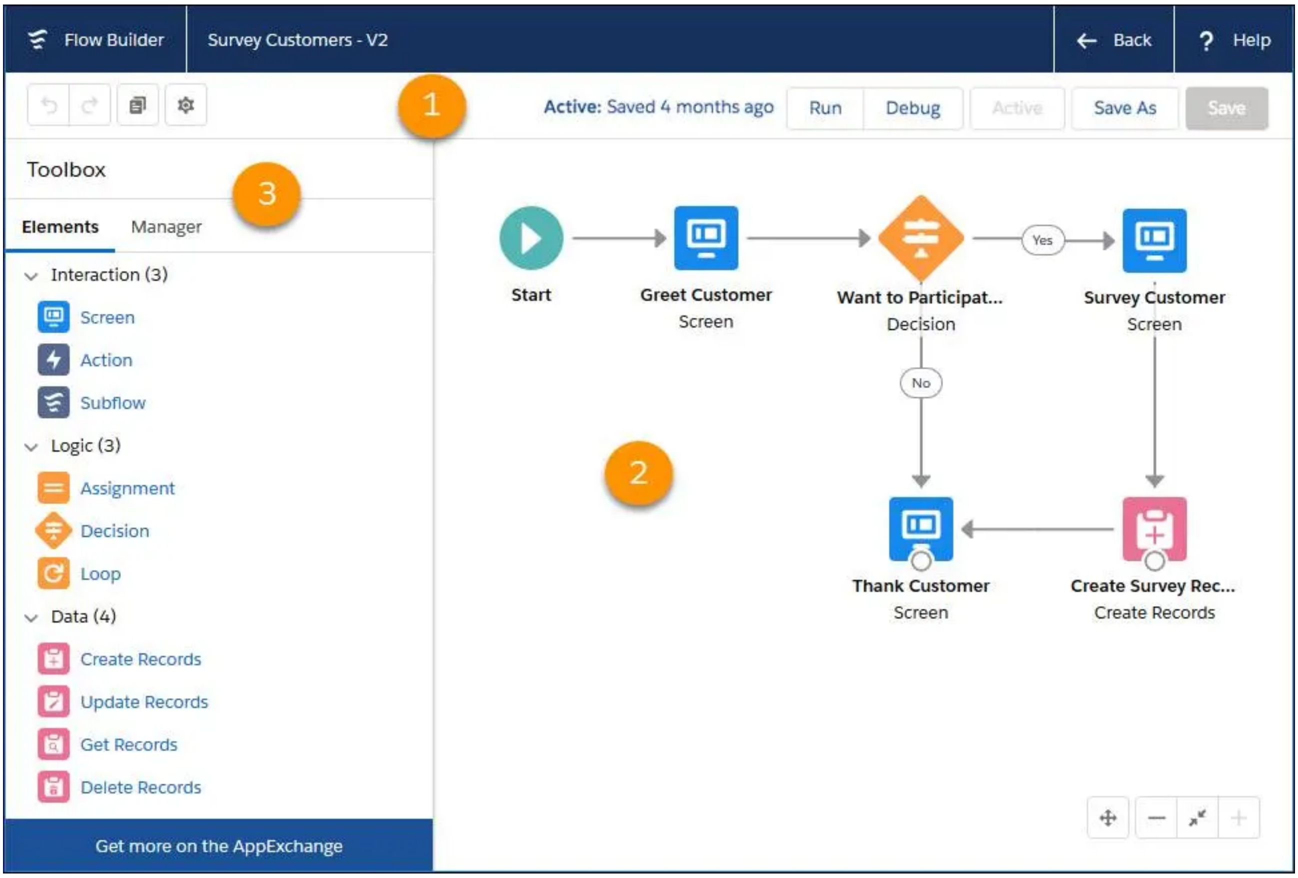
Logic
Control the flow of... well, your flow. Create branches, update data, loop over sets of data, or wait for a particular time.

Actions
Do something in Salesforce when you have the necessary information (perhaps collected from the user via a screen). Flows can look up, create, update, and delete Salesforce records. They can also create Chatter posts, submit records for approval, and send emails. If your action isn't possible out of the box, call Apex code from the flow.

Integrations
Connect your flow to an external database by using core actions or Apex actions. Core actions let you make requests without going through the Salesforce server. Flow Builder also has a couple of tie-ins to platform events. Publish platform event messages with a Create Records element. Subscribe to platform events with a Pause element.

Take a Tour

When you build flows, you work from Flow Builder.



Button Bar (1)
The button bar provides information about the flow, such as:

- Whether the flow is active or not.
- How long ago the flow was saved.
- Whether the flow has any warnings or errors. To see the warnings or errors, click the respective icon.

Canvas (2)
The canvas is the working area, where you build a flow by adding elements. As you add elements to the canvas and connect them together, you see a visual diagram of your flow.

Toolbox (3)
The toolbox contains the elements and resources you'll use to build your flow.

- From the Elements tab, add new elements, like Screen and Create Records, to your flow.
- From the Manager tab, create resources, such as variables, stages, and choices, to use in your flow. Or view a list of all elements and resources that you've added to the flow.

Keyboard Shortcuts
Use these handy keyboard shortcuts to quickly navigate your flow.

In Windows...

- To zoom in, press `CTRL =`.
- To zoom out, press `CTRL -`.
- To zoom to fit, press `CTRL 0`.
- To zoom to view, press `CTRL 1`.
- To select multiple elements on the canvas, press and hold `Shift` and click each element.

For Mac...

- To zoom in, press `Command =`.
- To zoom out, press `Command -`.
- To zoom to fit, press `Command 0`.
- To zoom to view, press `Command 1`.
- To select multiple elements on the canvas, press and hold `Shift` and click each element.

Build a Flow

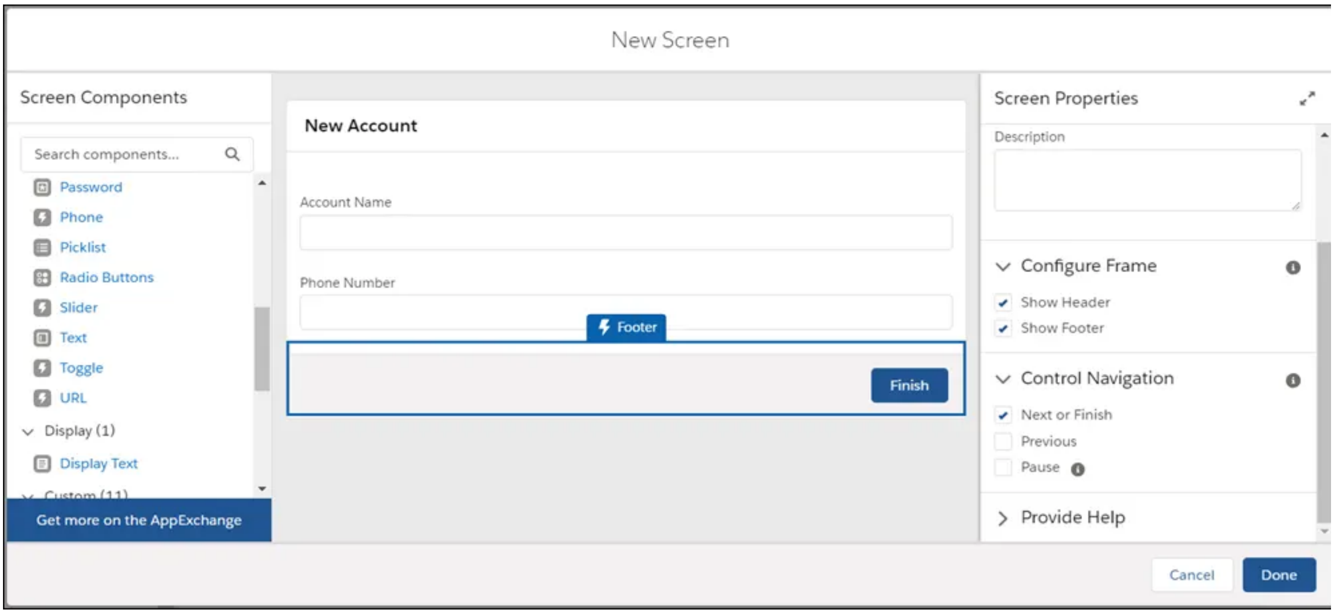
Depending on your page layouts, objects can have lots of fields, which can overwhelm users who just want to create a record quickly. Let's build a flow to streamline account creation. When it runs, our flow collects user input about a new account, creates an account record, and lets the user upload files to the account record.

> **Tip**
>
> Plan out your business process before you try to automate it. Doing so makes it easier to configure when you use one of our automation tools.

From Setup, enter `Flows` in the Quick Find box, then select **Flows**, click **New Flow**, then select **Screen Flow** and click **Create**.

Add a Screen to Collect User Input

1. From the toolbox, drag a **Screen** element onto the canvas.
2. Name it `New Account` in the Label field.
3. In Screen Components, click **Text** and then click **Text** again.
4. Select the first Text screen component and enter `Account Name` in the Label field.
5. Select the second Text screen component and enter `Phone Number` in the Label field.
6. Select the footer and on the right and under Control Navigation, deselect **Previous** and **Pause**.

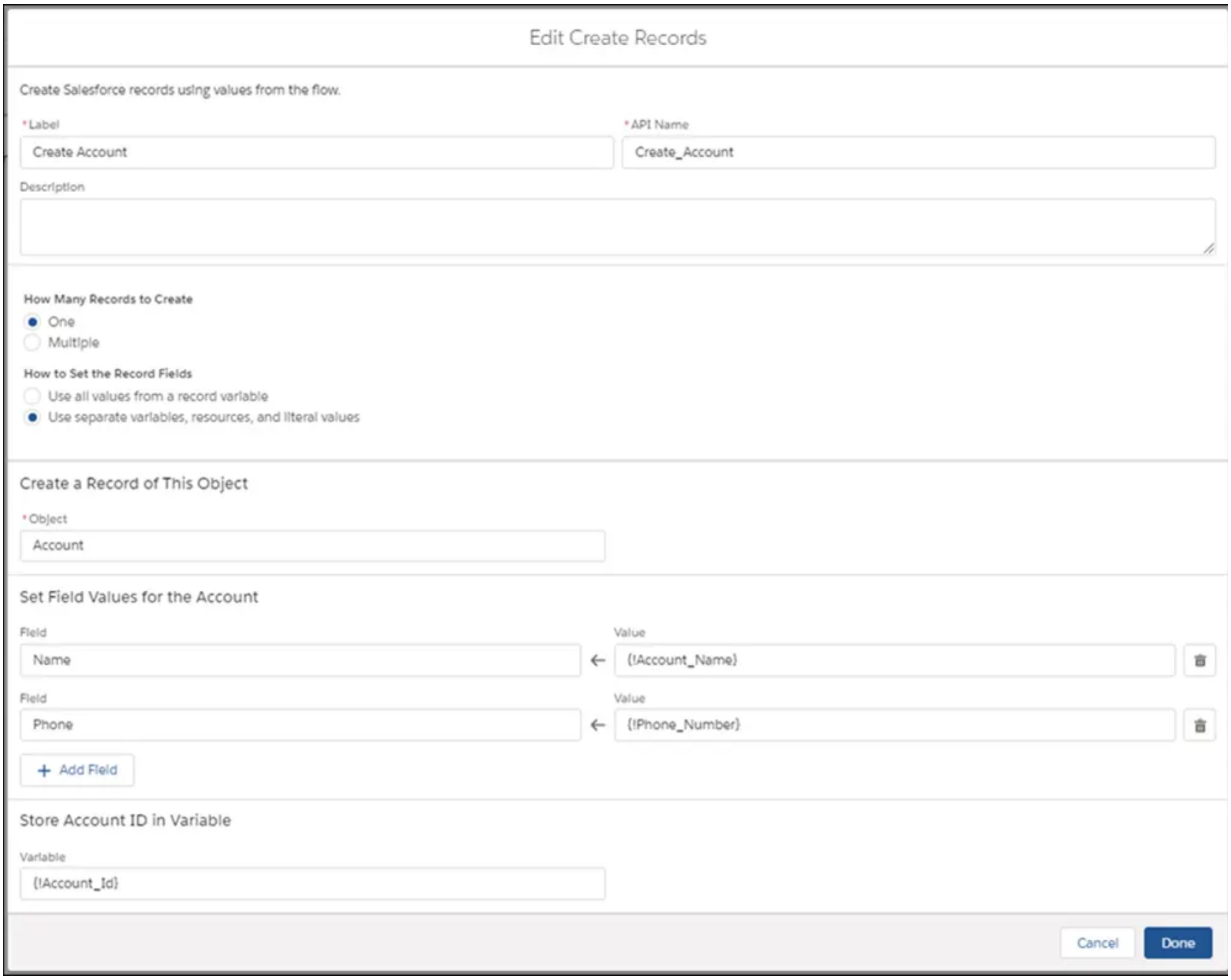


7. Click **Done**.

Add a Create Records Element to Create Records

The Create Records element uses the values from New Account to create an account record.

1. From the Toolbox, drag a **Create Records** element onto the canvas. Name it `Create Account` .
2. For How to Set the Record Fields, select **Use separate variables, resources, and literal values**.
3. In Create a Record of This Object, in Object, select **Account**.
4. In Field, select **Name**.
5. In Value, select **SCREEN COMPONENTS** | **Account_Name**.
6. Click **Add Field**.
7. In Field, select `Phone` .
8. In Value, select **SCREEN COMPONENTS** | **Phone_Number**.
9. In Store Account ID in Variable, select **New Resource** from the Variable dropdown. The New Resource window appears.
    a. In Resource Type, select **Variable**.
    b. Name the API `Account_Id` .
    c. In Data Type, select **Text**.
    d. Click **Done**.
10. In Store Account ID in Variable, select **VARIABLES** | **Account_Id** from the Variable dropdown.
    Make sure that your Create Records element looks like this.

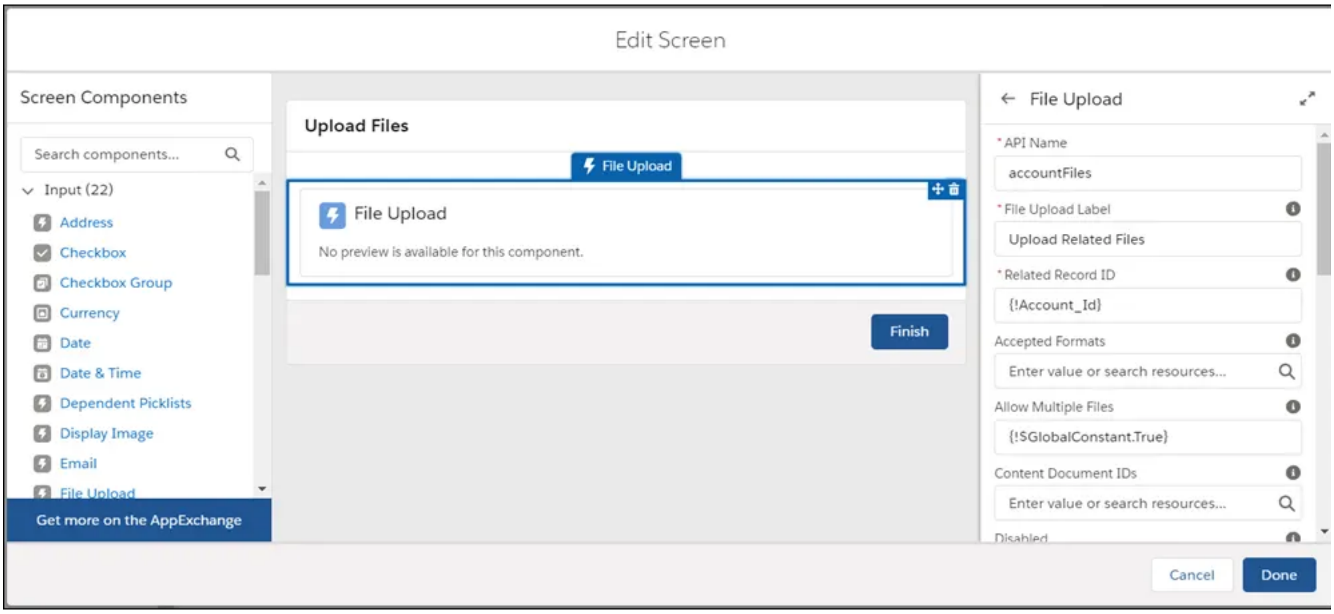


11. Click **Done**.

Create the Screen That Enables File Uploads

The second screen element lets users upload files for the account that they created.

1. Drag another **Screen** element onto the canvas.
2. In Screen Properties, configure these settings.
   a. Name the screen `Upload Files` in the Label field.
   b. Under Control Navigation, deselect **Previous** and **Pause**.
   If you don't make that selection users will be able to navigate back to the first screen, and multiple accounts could accidentally be created.
3. On the left in Screen Components, click **File Upload**.
   a. For API Name, enter `accountFiles` .
   b. For File Upload Label, enter `Upload Related Files` .
   c. For Related Record ID, select **VARIABLES** | **Account_Id**.
   d. For Allow Multiple Files, select **$GlobalConstant.True**.



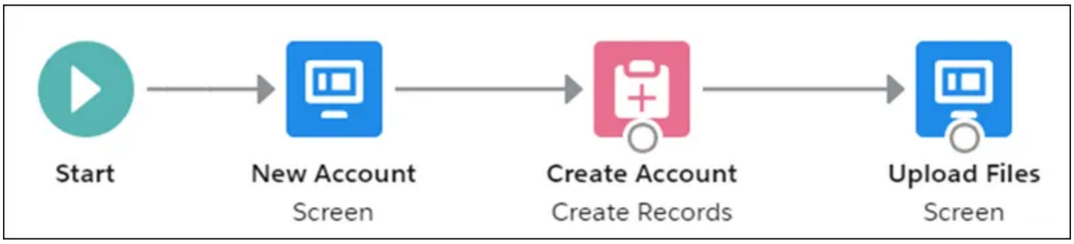
4. Click **Done**.

As configured, this File Upload component lets users upload more than one file at a time to the created account.

Connect the Elements to Finish the Flow

Connecting the flow elements tells the flow what order to follow at runtime.

1. Click the **node** at the bottom of Start and drag it to New Account.
2. Click the **node** at the bottom of New Account and drag it to Create Account.
3. Click the **node** at the bottom of Create Account and drag it to Upload Files.



4. Save the flow, name it `Quick Account` in Flow Label.
5. Click **Save**.
   Skip the warning you see about Lightning runtime. We talk about that next.

Make Your Flows Look Like Lightning

Salesforce offers two *runtime* experiences that determine the look and feel when someone runs a flow. To make your flows blend in with Lightning Experience, make sure that Lightning runtime is enabled in your org.

1. From Setup, enter `Automation` in the Quick Find box, and then select **Process Automation Settings**.
2. Verify that **Enable Lightning runtime for flows** is selected.
3. Save your changes.

Note

This setting only affects URL-based flows. That includes flows that are run from custom buttons or the Run button in Flow Builder. For more details, see Lightning Flow Runtime vs. Classic Flow Runtime.

Distribute Your Flow

Now it's time to distribute our flow to the right users. To do so, we add it to the Home page.

To learn about more ways to distribute a flow, check out the Screen Flow Distribution module.

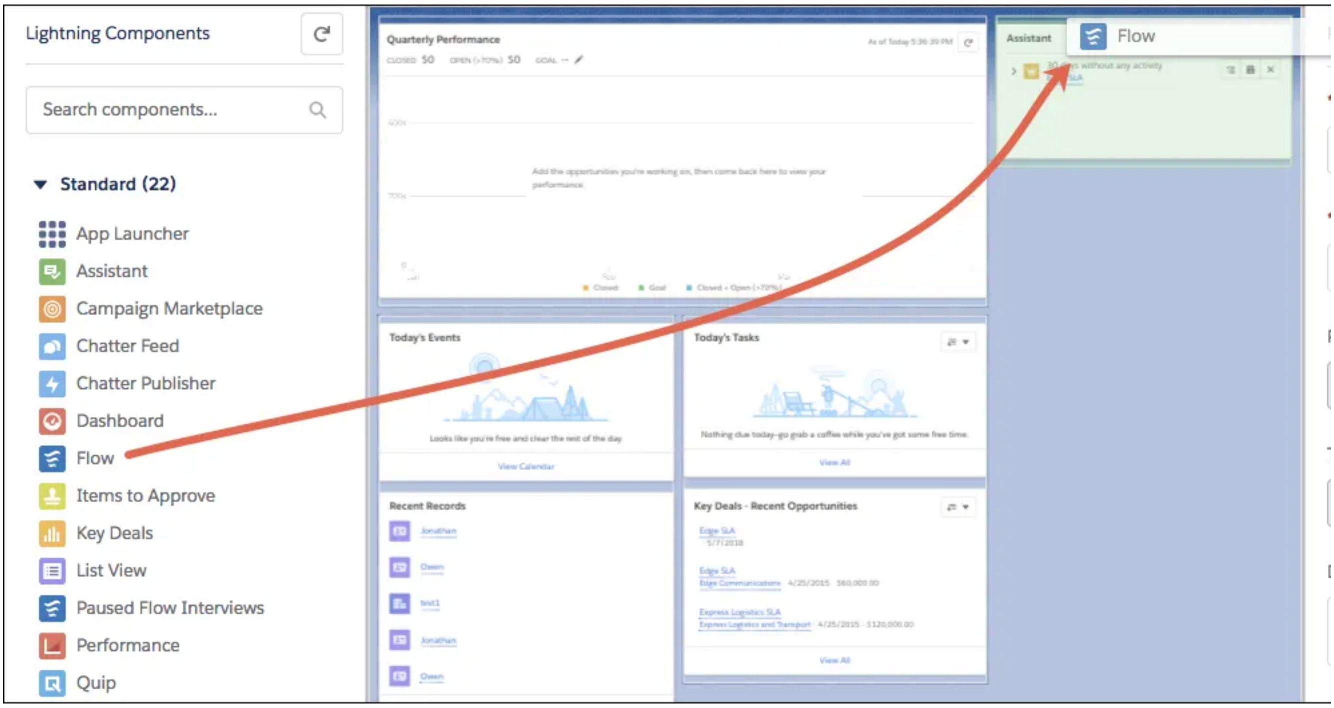
Activate Your Flow

Only active flows are available in the Lightning App Builder, so first activate the flow.

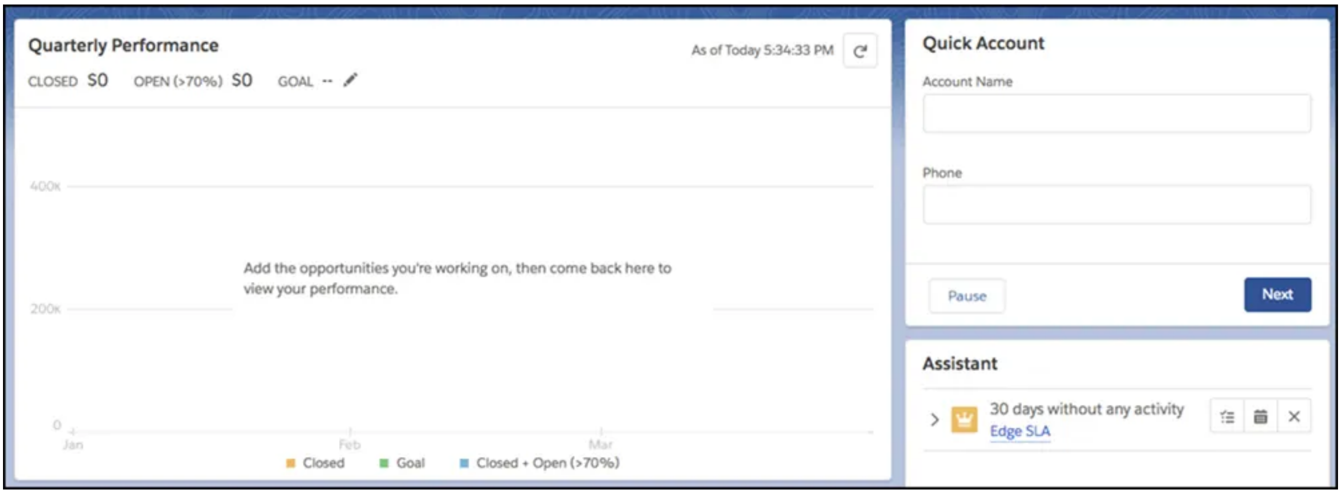
1. From Setup, enter `Flows` in the Quick Find box, then select **Flows**.
2. Click **Quick Account**.
3. From the button bar in Flow Builder, click **Activate**.

Add Your Flow to the Home Page

1. Create a home page.
    a. From Setup, enter `Builder` in the Quick Find checkbox, and then select **Lightning App Builder**.
    b. Click **New**.
    c. Select **Home Page** and click **Next**.
    d. Give the page a name and click **Next**.
    e. Click **CLONE SALESFORCE DEFAULT PAGE**, select **Home Page Default**, and click **Finish**.
2. Drag a Flow component to the top of the right column.



3. For Flow, select **Quick Account**.
4. Save your changes and activate the page. Mark this page as the default home page and click **Save**.
5. To see your flow in action, go to your Home page.
    a. Click **Back** to return to Setup.
    b. Click ⁝⁝⁝, and under All Items, click **Home**.



Make Sure Your Users Can Run the Flow

To make sure that your users can run the flow, add the Run Flows user permission to a permission set or profile, and assign it to the right users. If **Override default behavior and restrict access to enabled profiles or permission sets** is selected for the flow, add the flow to a permission set or profile, and assign it to the right users.

Note

Only flow admins (users with the Manage Flow user permission) can run inactive flows.

Tell Me More...

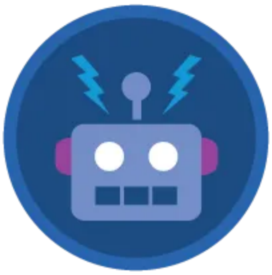
- A *flow interview* is a running instance of a flow. When you distribute a flow, users interact with individual interviews of that flow.
- This unit walked you through a simple example of a flow. You can customize that flow to do much more. For example, enhance the Quick Account flow so that it provides values for more account fields, like Account Number or Ownership. Or use the same inputs to also create a contact and an opportunity.

Resources

- Salesforce Help: Flows
- Trailblazer Community: Salesforce Workflow Automation
- Trailhead Module: Screen Flow Distribution

Assessment Complete!

+500 points



Lightning Flow
100%
Progress: 100%
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