



Visual Workflow Guide

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CONTENTS

Chapter 1: Visual Workflow	1
Flow Building Blocks	2
Which Automation Tool Should I Use?	3
Limits and Considerations for Visual Workflow	6
Chapter 2: Cloud Flow Designer	24
Chapter 3: Create a Flow	28
Common Flow Tasks	30
Manage Flow Elements, Resources, and Connectors	31
Validate Users' Inputs with Flow Formulas	31
Define Flow Conditions	32
Define the Path That a Flow Takes	38
Customize What Happens When a Flow Fails	39
Flow Reference	43
Flow Elements	44
Flow Resources	74
Cross-Object Field References in Flows	89
Flow Connectors	91
Flow Operators	91
Flow Event Types	110
Flow Types	116
Flow Properties	117
Sample Flows	118
Sample Flow That Populates a Collection Variable	119
Sample Flows That Wait for Events	120
Sample Flow That Loops Through a Collection	125
Chapter 4: Manage Your Flows	127
Chapter 5: Distribute Your Flow	133
Distribute a Flow to Internal Users	133
Distribute a Flow to External Users	145
Launch a Flow Automatically	146
Deploy a Flow to Other Organizations	153
Chapter 6: Why Did My Flow Interview Fail?	156
Chapter 7: Visual Workflow Terminology	161
INDEX	162

CHAPTER 1 Visual Workflow

Visual Workflow lets you automate business processes by building flows and distributing them to the right users or systems. A *flow* is an application that can execute logic, interact with the Salesforce database, call Apex classes, and collect data from users. You can build flows by using the Cloud Flow Designer.

You can also build autolaunched flows. An *autolaunched flow* can be launched without user interaction, such as from a process or the Apex `Interview.start` method. Autolaunched flows run in bulk and without user interaction. They can't contain steps, screens, choices, or dynamic choices in the active or latest flow version.

Visual Workflow has three different aspects.

Design

Create flows using the Cloud Flow Designer. This drag-and-drop tool lets you diagram flow structure and configure how it runs, without writing any code.

Manage

Once you create a flow, you can manage it in Salesforce, edit its properties, activate, deactivate, delete, or run it at will.

Run

Flow users can then run the active flow from a custom button, tab, link, or directly from the flow URL. If you've enabled them to do so, systems can run active flows through an Apex class or process.



Example: Use Visual Workflow to script calls for a customer support center or to generate real-time quotes for a sales organization.

IN THIS SECTION:

[Flow Building Blocks](#)

Use combinations of elements, connectors, and resources to build flows.

[Which Automation Tool Should I Use?](#)

Salesforce provides multiple tools to automate your organization's repetitive business processes: Approvals, Process Builder, Workflow, and Visual Workflow.

[What's the Difference Between Workflow and Visual Workflow?](#)

Despite their similar names, Workflow and Visual Workflow are separate Salesforce features for automating business processes.

[Limits and Considerations for Visual Workflow](#)

When designing, managing, and running flows, consider the permissions, use limits, and data issues.

SEE ALSO:

[Which Automation Tool Should I Use?](#)

[Flow Building Blocks](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

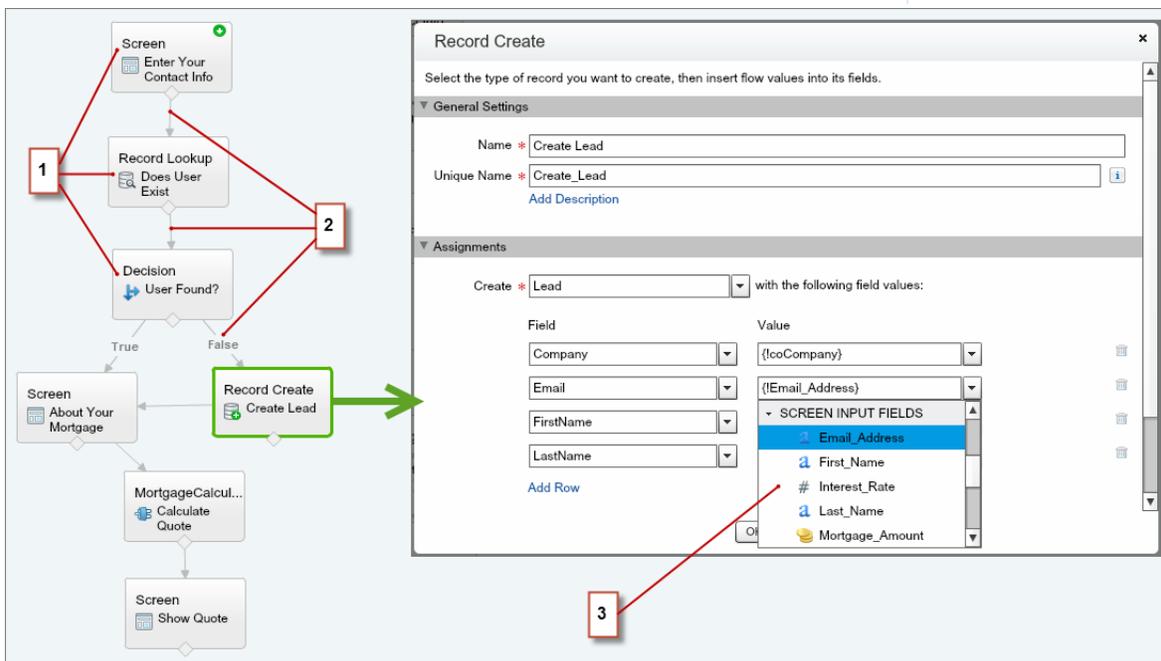
Flow Building Blocks

Use combinations of elements, connectors, and resources to build flows.

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- Each element (1) 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 (2) defines an available path that the flow can take at run time.
- Each resource (3) represents a value that you can reference throughout the flow.

SEE ALSO:

- [Flow Elements](#)
- [Flow Resources](#)
- [Flow Connectors](#)

Which Automation Tool Should I Use?

Salesforce provides multiple tools to automate your organization's repetitive business processes: Approvals, Process Builder, Workflow, and Visual Workflow.

The best automation tool for your needs depends on the type of business process that you're automating.

- [How a record gets approved](#)
Example: Managers approve their direct reports' requests for vacation.
- [What to do when a record has certain values](#)
Example: Notify the account owner when a related case is escalated.
- [Collecting information from users or customers and then doing something with that information](#)
Example: Customer support uses a wizard to step through a call script, and cases are created based on the information that they enter.

How a Record Gets Approved

To automate your organization's processes for approving records, create approval processes.

What to Do When a Record Has Certain Values

Three of our tools can address this use case: Workflow, Process Builder, and Visual Workflow. Respectively, these tools create workflow rules, processes, and flows.

We recommend starting with Process Builder, especially for business processes that can be simplified to if/then statements. For example: if a case is escalated, then notify the account owner.

Process Builder includes almost all the functionality that's available in workflow rules, and more. In fact, a single process can do what it would normally take multiple workflow rules to do.

There are only two things that you can do with workflow that you can't do with processes.

- Configure actions to be executed at multiple intervals.
With a process, you can configure actions to be performed later, but all those actions are performed at the same time. If you need multiple "later"s, use workflow. For example, use multiple time triggers in a workflow rule to email an account manager one month, two weeks, one week, and three days before a related contract expires.
- Send outbound messages without code.
However, you can work around this limitation by calling Apex code from a process.

If the process is too complicated for the Process Builder or requires more advanced functionality, create a flow by using the Cloud Flow Designer. For example, create a flow to:

- Use complex branching logic (if certain conditions are true, evaluate for further conditions)
Example: First, check whether a case is escalated. If the case is escalated, check the account's region and route the case accordingly.
- Sort through, iterate over, and operate on several records
Example: After an opportunity is closed and won, calculate the opportunity's discount. Then apply that discount to all the related opportunity products.

EDITIONS

Available in: Salesforce Classic

Processes and flows are available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Approvals are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Workflow is available in: **Professional, Enterprise, Performance, Unlimited, Developer, and Database.com** Editions

Workflow tasks, email alerts, and flow triggers are not available in **Database.com**

Getting Information from Users or Customers and Then Doing Something with It

If you need to build a wizard to collect information, Visual Workflow is the tool for you. Create a flow that displays information to and requests information from a user. Then take the information that they enter and perform actions in Salesforce with it.

For example, create a flow that walks customer support representatives through a call script. The flow uses information that the representative entered, such as the caller’s name and account number, to create a case that’s assigned to the right person.

You can add more complexity to the flow to match your business process. For example:

- Route the representative to different screens, depending on earlier choices. This prevents the representative from doing things like trying to upsell a product to a customer who already bought that product.
- Check whether the reported problem is blocking the customer’s business and the account is high-value. If so, the flow notifies the region director.

Automation Tool Features

Here’s the breakdown of all the features and actions that are supported in each of our automation tools. Use it to figure out which tool is best for your business needs.

	Process Builder	Visual Workflow	Workflow	Approvals
Complexity	Multiple if/then statements	Complex	A single if/then statement	A single if/then statement
Visual designer	✔	✔		
Browser support	All (Chrome recommended)	All (Safari not recommended)	All	All
Starts when	Record is changed	<ul style="list-style-type: none"> • User clicks button or link • User accesses custom tab • Process starts • Apex is called 	Record is changed	<ul style="list-style-type: none"> • User clicks button or link • Process or flow starts that includes a “Submit for Approval” action • Apex is called
Supports time-based actions	✔ (only one time supported per criteria node)	✔	✔	
Supports user interaction		✔		
Supported Actions				
Call Apex code	✔	✔		
Create records	✔	✔	Tasks only	Tasks only

	Process Builder	Visual Workflow	Workflow	Approvals
Delete records		✓		
Launch a flow	✓	✓	✓ (Pilot) ¹	
Post to Chatter	✓	✓		
Send email	✓ (Email alerts only)	✓	✓ (Email alerts only)	✓ (Email alerts only)
Send outbound messages without code			✓	
Submit for approval	✓	✓		
Update fields	Any related record	Any record	The record or its parent	The record or its parent

¹The Process Builder has superseded flow trigger workflow actions, formerly available in a pilot program. Organizations that are using flow trigger workflow actions can continue to create and edit them, but flow trigger workflow actions aren't available for new organizations.

What's the Difference Between Workflow and Visual Workflow?

Despite their similar names, Workflow and Visual Workflow are separate Salesforce features for automating business processes.

Workflow

Workflow enables you to set up *workflow rules*. A workflow rule identifies what kinds of record changes or additions trigger specified *workflow actions*, such as sending email alerts and updating record fields.

Workflow rules and actions are associated with a specific object (and can cross objects only to update fields on a related master record).

Visual Workflow

Visual Workflow enables you to create *flows*, which are triggered by users rather than events. Unlike Workflow, which always executes rules and actions behind the scenes, Visual Workflow offers screens for displaying and collecting information from the user running the flow.

 **Note:** You can, however, participate in a pilot program that enables workflow rules to execute flows behind the scenes. The Process Builder has superseded flow trigger workflow actions, formerly available in a pilot program. Organizations that are using flow trigger workflow actions can continue to create and edit them, but flow trigger workflow actions aren't available for new organizations.

Flows aren't tied to any one object. They can look up, create, update, and delete records for multiple objects.

In case you're wondering, the "visual" in Visual Workflow refers to the ability to visually build flows using the Cloud Flow Designer. Its drag-and-drop user interface lets you build flows without writing any code.

SEE ALSO:

- [Which Automation Tool Should I Use?](#)
- [Visual Workflow](#)

Limits and Considerations for Visual Workflow

When designing, managing, and running flows, consider the permissions, use limits, and data issues.

IN THIS SECTION:

- [Limits for Visual Workflow](#)
When using Visual Workflow, keep flow limits and Apex governor limits in mind.
- [Considerations for Designing Flows](#)
When you design flows, keep certain guidelines in mind.
- [Considerations for Managing Flows](#)
When managing flows, consider the administration and activation limits.
- [Considerations for Running Flows](#)
When you run or test a flow, keep certain limits and guidelines in mind.
- [Flow Accessibility](#)
Visual Workflow is 508-compliant with a few exceptions.

SEE ALSO:

- [Cloud Flow Designer](#)

Limits for Visual Workflow

When using Visual Workflow, keep flow limits and Apex governor limits in mind.

Maximum number of versions per flow	50
Maximum number of executed elements at run time	2000
Maximum number of active flows and processes per organization	500
Maximum number of flows and processes per organization	1000
Maximum number of flow interviews or groups of scheduled actions (from processes) that are waiting at one time	30,000
Maximum number of flow interviews that are resumed or groups of scheduled actions that are executed per hour	1000
Maximum number of relative time alarms defined in flow versions or schedules based on a field value in processes	20,000

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

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- Unlimited
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- Developer

IN THIS SECTION:

[Apex Governor Limits that Affect Flows](#)

Salesforce strictly enforces limits to ensure that any runaway flows don't monopolize shared resources in the multitenant environment. Per-transaction limits, which Apex enforces, govern flows. If an element causes the transaction to exceed governor limits, the system rolls back the entire transaction. The transaction rolls back even if the element has a defined fault connector path.

[Flows in Transactions](#)

Each flow interview runs in the context of a *transaction*. A transaction represents a set of operations that are executed as a single unit. For example, a transaction can execute Apex triggers and escalation rules in addition to a flow interview. If one interview in a transaction fails, all the interviews in the transaction are rolled back, as well as anything else the transaction did. The transaction doesn't retry any of the operations—including the flow interview.

[Flow Bulkification in Transactions](#)

Programmers can design their code so that similar actions are performed together in one batch. For example, one operation to create 50 records rather than 50 separate operations that each create one record. This process is called *bulkification*, and it helps your transaction avoid governor limits. If you're working with flows, you don't even have to think about bulkification. Flow interviews bulkify actions for you automatically.

SEE ALSO:

[Visual Workflow](#)[Limits and Considerations for Visual Workflow](#)

Apex Governor Limits that Affect Flows

Salesforce strictly enforces limits to ensure that any runaway flows don't monopolize shared resources in the multitenant environment. Per-transaction limits, which Apex enforces, govern flows. If an element causes the transaction to exceed governor limits, the system rolls back the entire transaction. The transaction rolls back even if the element has a defined fault connector path.

Description	Per-Transaction Limit ¹
Total number of SOQL queries issued (Record Update, Record Delete, Record Lookup, and Fast Lookup element executions)	100
Total number of records retrieved by SOQL queries (across all Record Update, Record Delete, Record Lookup, and Fast Lookup elements executed in all interviews in the transaction)	50,000
Total number of DML statements issued (Record Create, Record Update, Record Delete, Fast Create, Fast Update, and Fast Delete executions)	150
Total number of records processed as a result of DML statements	10,000

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¹ Autolaunched flows are part of the larger transaction through which they were launched. For example, flows launched from a process are executed with the process actions as part of the larger transaction. Flows with Screen elements can span multiple transactions. A new transaction begins each time the user clicks **Next** in a screen. Flows with Wait elements span multiple transactions. A transaction ends when a flow interview begins to wait for an event. When the flow interview resumes, a new transaction begins. Everything after the Wait element is executed as part of a batch transaction that includes other resumed interviews.

SEE ALSO:

[Force.com Apex Code Developer's Guide: Understanding Execution Governors and Limits](#)
[Limits for Visual Workflow](#)

Flows in Transactions

Each flow interview runs in the context of a *transaction*. A transaction represents a set of operations that are executed as a single unit. For example, a transaction can execute Apex triggers and escalation rules in addition to a flow interview. If one interview in a transaction fails, all the interviews in the transaction are rolled back, as well as anything else the transaction did. The transaction doesn't retry any of the operations—including the flow interview.

In each transaction, Salesforce enforces governor limits to prevent shared resources from being depleted. Because multiple Salesforce organizations share the same resources, Salesforce prevents one organization from depleting all the resources and leaving the other organizations high and dry. It's similar to an apartment building that uses one cache of water to service every tenant. If your neighbor uses all the water, you can't take a shower. (It's trite, but hopefully you get the idea.) Per-transaction governor limits help prevent such things from happening.

IN THIS SECTION:

[When Does a Flow's Transaction Start?](#)

Depending on how the flow was distributed, a transaction that runs an interview for that flow starts in different ways.

[When Does a Flow's Transaction End?](#)

When a transaction ends depends on whether the flow contains certain elements and whether it originally started because a record was changed.

SEE ALSO:

[Flow Bulkification in Transactions](#)

When Does a Flow's Transaction Start?

Depending on how the flow was distributed, a transaction that runs an interview for that flow starts in different ways.

Distribution Method	Transaction starts when...
Process Builder ¹	A record is created or updated.
Flow URL	The URL is accessed.
Custom button or link	The button or link is clicked.
Visualforce page	The page is accessed.

Distribution Method	Transaction starts when...
Interview.start() method	<p>If the method starts via a <code>before</code> or <code>after</code> trigger, the transaction starts when a record is created or updated.</p> <p>Otherwise, the transaction starts when the method (or a parent method) is invoked.</p> <p>The <code>start()</code> method shares its limits with other operations in the transaction and other methods in the class.</p>
REST API (Custom Actions or Flows resource)	When the REST call is made. Depending on how the REST call is implemented, the limits can be shared with other operations.

¹The same also applies if the flow is distributed through a workflow rule. The Process Builder has superseded flow trigger workflow actions, formerly available in a pilot program. Organizations that are using flow trigger workflow actions can continue to create and edit them, but flow trigger workflow actions aren't available for new organizations.

 **Note:** When a Screen or Wait element is executed, the existing transaction ends and a new one begins.

When Does a Flow's Transaction End?

When a transaction ends depends on whether the flow contains certain elements and whether it originally started because a record was changed.

The transaction ends when:

- A Screen or Wait element is executed
- The order of execution has completed—if the flow was triggered when a record was created or updated
- All the interviews in the transaction have finished

 **Tip:** If you think that a flow's interview is likely to hit governor limits within its transaction, consider adding a Wait element or a Screen element.

If the interview is one of many things being done in a given transaction, that interview shares the transaction's governor limits with the other operations.

 **Example:** You update 100 cases through Data Loader. Due to the order of execution in a transaction and the customizations in your organization, here's what happens.

	Transaction Operation	DML Statement Used	SOQL Query Used
1	Cases are saved to the database, but aren't committed yet.		
2	Case assignment rules are executed. Each case's owner is updated.		
3	Case escalation rules are executed. If any case has been open for 10 days, an email is sent to the owner.		
4	Process is started.		
5	Process looks up the case's account.		

	Transaction Operation	DML Statement Used	SOQL Query Used
6	If the account is hot, process uses Chatter to notify the account owner that there's a new case associated with the account.	✓	
7	Process launches a flow interview.		
8	Flow interview looks up the parent account and how many cases it has.		✓
9	Flow interview checks whether the account has more than five open cases.		
10	If it does, flow interview looks up the account's division manager then posts on the account's Chatter feed to notify the division manager and account owner.	✓	✓
11	If it doesn't, flow interview posts on the account's Chatter feed to notify only the account owner.	✓	

SEE ALSO:

[Force.com Apex Code Developer's Guide: Triggers and Order of Execution](#)

Flow Bulkification in Transactions

Programmers can design their code so that similar actions are performed together in one batch. For example, one operation to create 50 records rather than 50 separate operations that each create one record. This process is called *bulkification*, and it helps your transaction avoid governor limits. If you're working with flows, you don't even have to think about bulkification. Flow interviews bulkify actions for you automatically.

IN THIS SECTION:

[How Does Flow Bulkification Work?](#)

Interview operations are bulkified only when they execute the same element. That means that the interviews must all be associated with the same flow.

[Which Flow Elements Can Be Bulkified?](#)

Flows can bulkify any element that performs a DML statement or SOQL query or does something else external to the flow, like sending an email.

[Example of Flow Bulkification](#)

This example demonstrates how operations are bulkified for a flow when 100 cases are updated through Data Loader.

SEE ALSO:

[Flows in Transactions](#)

How Does Flow Bulkification Work?

Interview operations are bulkified only when they execute the same element. That means that the interviews must all be associated with the same flow.

When multiple interviews for the same flow run in one transaction, each interview runs until it reaches a bulkifiable element. Salesforce takes all the interviews that stopped at the same element and intelligently executes those operations together. If other interviews are at a different element, Salesforce then intelligently executes those operations together. Salesforce repeats this process until all the interviews finish.

If, despite the bulkification, any interview hits a governor limit, all the interviews in the transaction fail. Any operations that the interviews performed are rolled back, and the transaction doesn't try to perform the operations again.



Example: When you upload 100 cases, the flow MyFlow_2 triggers one interview for each case.

- 50 interviews stop at Record Create element **Create_Task_1**.
- The other 50 interviews stop at Record Create element **Create_Task_2**.

The result? At least two groups of bulk operations to execute.

- One for the 50 interviews that execute **Create_Task_1**
- One for the 50 interviews that execute **Create_Task_2**

Which Flow Elements Can Be Bulkified?

Flows can bulkify any element that performs a DML statement or SOQL query or does something else external to the flow, like sending an email.

Elements that create, update or delete records

When a record is created, updated, or deleted, the transaction performs a DML statement.

- Create elements (Record Create, Fast Create)
- Update elements (Record Update, Fast Update)
- Delete elements (Record Delete, Fast Delete)
- Quick Action elements
- Post to Chatter elements
- Submit for Approval elements
- Apex elements—depending on your organization (invocable Apex only)

Elements that look up records

When fields on a record are looked up, the transaction performs a SOQL query.

- Lookup elements (Record Lookup, Fast Lookup)
- Record Update elements
- Record Delete elements
- Apex elements—depending on your organization (invocable Apex only)

Elements that send emails

- Send Email elements
- Email Alert elements

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

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- Performance
- Unlimited
- Developer

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- Apex elements—depending on your organization (invocable Apex only)

 **Note:**

- Unlike invocable Apex, Apex Plug-in elements aren't bulkified.
- Although invocable Apex is bulkified, the flow has no way of knowing what the invoked methods' operations are. If you want those operations to also be bulkified, make sure the code follows bulkification best practices.

SEE ALSO:

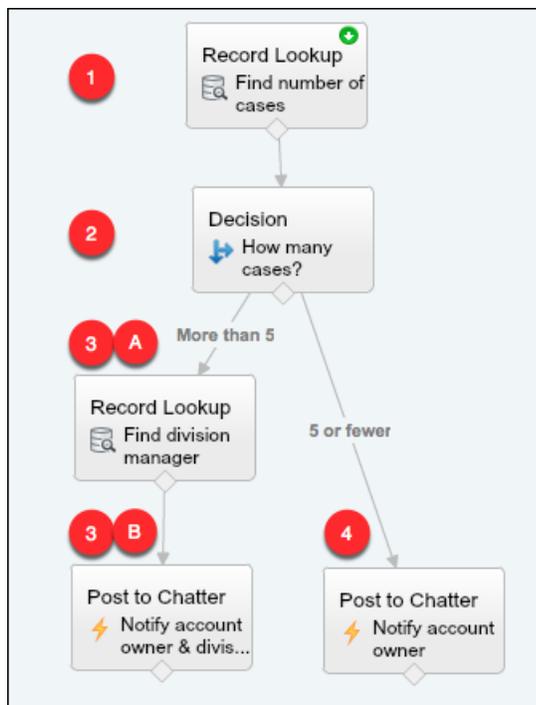
[Force.com Apex Code Developer's Guide: Running Apex within Governor Execution Limits](#)

Example of Flow Bulkification

This example demonstrates how operations are bulkified for a flow when 100 cases are updated through Data Loader.

The Associated Flow

You'll understand the concepts better if you understand the design of the associated flow.



The flow:

1. Looks up the case's parent account and how many open cases that account has.
2. Checks whether the account has more than five cases open.
3. If the account has more than five open cases:
 - a. Looks up the division manager for the account.

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- b. Posts on the account’s Chatter feed to notify the division manager and the account owner.
4. If the account has five or fewer open cases, posts on the account’s Chatter feed to notify only the account owner.

The Bulkified Interviews

When you update the records, one flow interview is created for each case simultaneously. All of the interviews are associated with the same flow. Each interview runs until it gets to a bulkifiable element.

The first interview goes through the Record Lookup element **(1)**. Because Record Lookups can be bulkified, the interview waits there until all the other interviews have done the same. Then, Salesforce executes all the Record Lookup operations together (because they’re all for the same element in the same flow). Instead of 100 SOQL queries, the transaction issues one SOQL query.

The first interview is evaluated by the Decision element **(2)**. The account has six cases, so the interview is routed down the “More than 5” path. The interview proceeds to the second Record Lookup element **(3a)**. Because it’s a bulkifiable element, the interview waits there.

The second interview is evaluated by the Decision element **(2)**. This account has one case, so the interview is routed down the “5 or fewer” path. The interview proceeds to the Post to Chatter element **(4)**. This element is also bulkifiable, so the interview waits there.

After all the interviews have been processed, 30 are waiting to execute the second Record Lookup element **(3a)** and the remaining 70 are waiting to execute the Post to Chatter element **(4)**.

Salesforce executes all the Record Lookup **(3a)** operations for the first 30 interviews together. Instead of 30 separate SOQL queries, the transaction issues one.

Next, the transaction returns to the Post to Chatter element **(4)**, where the 70 interviews are ready to execute their Post to Chatter operations. Remember, these are the interviews whose accounts don’t have more than five cases. Salesforce executes the Post to Chatter operations together. Instead of 100 separate DML statements to create each Chatter post, the transaction issues one DML statement to create all 100 posts at one time. Because the Post to Chatter element isn’t connected to a subsequent element, those 70 interviews finish.

The 30 interviews—which looked up the relevant division manager—proceed to the final Post to Chatter element **(3b)**. When all 30 interviews are ready, Salesforce executes all 30 Post to Chatter operations together. Instead of issuing 30 separate DML statements for the individual Chatter posts, it issues one. Because the Post to Chatter element isn’t connected to another element, those 30 interviews finish.

Considerations for Designing Flows

When you design flows, keep certain guidelines in mind.

Deleting Variables

If you delete an sObject variable or sObject collection variable, any variable assignments that use the deleted variable are set to `null`.

Referring to Blank Fields or Resources

If you leave any field or resource value blank, that value is `null` at run time. To treat a text value as an empty string instead of `null`, set it to `{!$GlobalConstant.EmptyString}`.

Setting the Record Type

To set the record type for a record, use the ID of the record type. Look up the record type by its name and then store its ID in the flow.

For example, use a Record Lookup element to find the RecordType record whose Name is “Reduction Order”. Then store that record type’s ID in a variable. You can then use the variable to set the `Order Record Type` field on an order record.

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External Objects

External objects aren't supported in flows.

IN THIS SECTION:[Considerations for the Cloud Flow Designer](#)

When you create a flow in the Cloud Flow Designer, familiarize yourself with its limitations and behaviors. For example, it supports a handful of locales and can't open flows from managed packages.

[Guidelines for Working with Large Flows](#)

Business processes can be complex. When your flow is too large for the canvas, control the zoom, search in the Explorer tab, or collapse the left side panel.

[Limitations for Multi-Select Choice Fields](#)

Multi-select checkboxes and multi-select picklist fields let flow users select multiple choices in a screen field. Before you start using multi-select choice fields, understand how they work in flows, both when you design the flows and when your users run them.

[Limitations for Flow Formulas](#)

When you create a formula resource or add validation to a screen input field, understand the limitations of formulas in Visual Workflow.

[Limitations for Time-Based Flows](#)

Before you design flows that contain one or more Wait elements, understand the limitations and guidelines.

SEE ALSO:

[Create a Flow](#)

[Flow Operators](#)

[Limits and Considerations for Visual Workflow](#)

[Cross-Object Field References in Flows](#)

Considerations for the Cloud Flow Designer

When you create a flow in the Cloud Flow Designer, familiarize yourself with its limitations and behaviors. For example, it supports a handful of locales and can't open flows from managed packages.

- At run time, time zones for date/time values can differ from what you see in the Cloud Flow Designer. During run time, date/time values reflect the running user's time zone settings in Salesforce. In the Cloud Flow Designer, date/time values reflect the time zone set on your computer. The Cloud Flow Designer appends the GMT offset to your date/time value.
- The Cloud Flow Designer doesn't support UTF-8 encoding for text in user input fields.
- The Cloud Flow Designer contains embedded fonts for all locales it supports. The supported locales are:
 - English (US)
 - French (France)
 - German (Germany)
 - Spanish (Spain)
 - Japanese (Japan)
 - Chinese (Traditional)
 - Chinese (Simplified)

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If you enter unsupported characters for a supported locale, they're displayed using system fonts instead of the embedded fonts. In unsupported locales, your system font settings are used to display all characters in the Cloud Flow Designer.

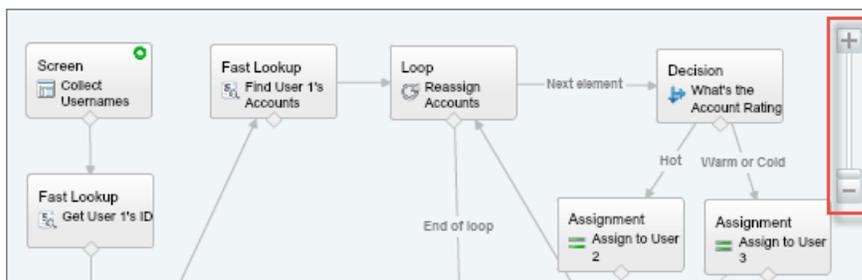
- The Cloud Flow Designer can't open flows that are installed from managed packages.
- Don't enter the string `null` as the value of a text field in the Cloud Flow Designer.
- The Cloud Flow Designer has access to information that exists when you open it. If you modify data or metadata in your organization and need to refer to it in a flow, close and reopen the Cloud Flow Designer. For example, if you add a custom field or modify an Apex class with the Cloud Flow Designer open, close and reopen the Cloud Flow Designer.
- The Cloud Flow Designer uses the permissions and locale assigned to the current user.
- If you open a flow that was last opened in Winter '12 or earlier, each Boolean decision is converted to a multi-outcome Decision element that:
 - Uses the same name as the old decision.
 - Takes the unique name of the old decision, appended with “_switch”.
 - Has an outcome labeled “True”. This outcome's unique name matches that of the old decision, and its conditions are migrated from the True outcome of the old decision.
 - Has a default outcome labeled “False”.

Guidelines for Working with Large Flows

Business processes can be complex. When your flow is too large for the canvas, control the zoom, search in the Explorer tab, or collapse the left side panel.

Zoom

To zoom in and out of your flow, use the + and - buttons on the right side of the canvas.



EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Search in the Explorer tab

Looking for a specific element or resource? Search for it in the Explorer tab.

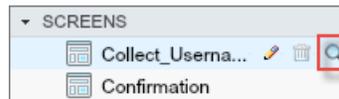


- To find an element with a specific name, type in the search box.
- To find all instances of a certain element or resource, click the magnifying glass and select the type.

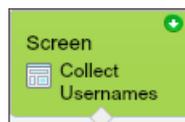
Once you find the right resource in the Explorer tab, see which elements are using the resource. In the Description pane, click the Usage tab.



Once you find the right element in the Explorer, find that element in your canvas. Hover over the element, and click the magnifying glass.



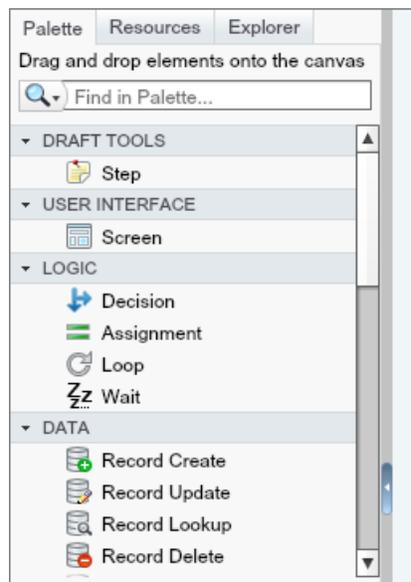
The element is highlighted in green in your canvas.



If the element wasn't in view, the Cloud Flow Designer automatically scrolls to show the element.

Collapse the left side panel

To hide the Palette, Resources, and Explorer tabs from your view, click the left arrow next to the side panel. That way, you get even more space in the canvas.



Limitations for Multi-Select Choice Fields

Multi-select checkboxes and multi-select picklist fields let flow users select multiple choices in a screen field. Before you start using multi-select choice fields, understand how they work in flows, both when you design the flows and when your users run them.

Configuring a Multi-Select Resource Field

- A multi-select choice field can have only one default value.
- A dynamic record choice resource can be configured to assign field values from a user-selected record to variables in the flow. When a multi-select choice field uses a dynamic record choice, only values from the last record that the user selects are stored in the flow variables. If multiple multi-select choice fields on one screen use the same dynamic record choice, the variable assignments obey the first of those fields.

Using Values from a Multi-Select Resource Field

- At run time, a multi-select field's value is a concatenation of the user-selected choice values, separated by semicolons. If any of the selected choices' values included semi-colons, those semi-colons are removed.
- If you referenced multi-select choice fields in flow conditions, follow these best practices.
 - Configure a stored value for each choice that you use in multi-select choice fields.
 - Don't use the same choice in multiple multi-select choice fields on the same screen.

SEE ALSO:

[Flow Screen Element: Choice Fields](#)

Limitations for Flow Formulas

When you create a formula resource or add validation to a screen input field, understand the limitations of formulas in Visual Workflow.

- Flow formulas can't contain more than 3,000 characters.
- A formula returns `null` if:
 - The value that the formula returns doesn't match its data type.
 - The formula contains an unsupported function.

For example, if your formula resource has a data type of Number, the output must be numeric.
- These functions aren't supported in a flow formula.
 - GETRECORDIDS
 - IMAGE
 - INCLUDE
 - ISCHANGED
 - ISNEW
 - PARENTGROUPVAL
 - PREVGROUPVAL
 - PRIORVALUE
 - REQUIRE SCRIPT
 - VLOOKUP

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

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For a complete list of operators and functions for building formulas in Salesforce, see “Formula Operators and Functions” in the Salesforce Help.

- In a flow, the `CONTAINS` function checks all characters within its parentheses. For cross object field references, `CONTAINS` works like it does in the rest of Salesforce. It checks only the first 250 characters in the reference.

Here’s an example. `varContract` refers to an `sObject` variable that contains the values of a contract record. This formula expression checks only the first 250 characters.

```
CONTAINS({!varContract.Account.Description}, "description")
```

This formula expression checks all characters in the field.

```
CONTAINS({!varContract.Description}, "description")
```

- If a Display Text screen field contains an invalid formula resource, the flow displays an empty string at run time.
- If a flow contains an invalid formula resource, you can't activate the flow.

SEE ALSO:

[Flow Formula Resource](#)

[Flow Resources](#)

Limitations for Time-Based Flows

Before you design flows that contain one or more Wait elements, understand the limitations and guidelines.

- After you deactivate a flow or flow version, the associated waiting interviews continue as usual. You can't delete a flow or flow version if it has associated waiting interviews.
- An interview can execute only one event path per Wait element. After one of its events is processed, the remaining events are removed from the queue.
- An organization can process up to 1000 events per hour. When an event is processed, the interview that it's associated with is resumed and any other events for that interview are removed from the queue. If an organization exceeds this limit, Salesforce processes the remaining events in the next hour.

For example, an organization has 1,200 events scheduled to be processed between 4:00 PM and 5:00 PM. Salesforce processes 1000 events between 4:00 PM and 5:00 PM and the additional 200 events between 5:00 PM and 6:00 PM.

- An organization can have up to 30,000 interviews waiting at a given time.
- If the user who started the interview is deactivated when Salesforce tries to execute an event path, the interview fails to resume.

Transactions and Waiting Interviews

A transaction ends as soon as a flow interview begins to wait for an event. When the flow interview resumes, a new transaction begins. Everything after the Wait element is executed as part of a batch transaction that includes other resumed interviews.

Interviews aren't resumed independently. They're grouped into a single batch that starts resuming within one hour after the first interview enters the batch. Any actions that fire as a result of those grouped interviews are also executed in that transaction. This behavior can cause you to exceed your Apex governor limits if the resumed interview executes DML operations or SOQL queries through:

- Flow elements such as Record Create or Fast Lookup

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- Apex Plug-in elements
- Apex triggers
- Immediate workflow actions

For details on Apex governor limits, see [Limits for Visual Workflow](#) on page 6.

If a Wait element precedes any flow elements that execute DML operations or SOQL queries:

- Ensure that your flows don't perform more DML operations or SOQL queries between Wait elements than the Apex governor limits allow.
- Consider using multiple Wait elements so that the DML operations and SOQL queries are performed in multiple transactions.
- Add fault paths for those elements so that the flow returns to the Wait element if the fault message contains:

```
Too many SOQL queries
```

or

```
Too many DML operations
```

If an interview fails after it's resumed:

- Prior interviews in that batch's transaction are successful.
- Operations that the interview executed before it waited are successful.
- If a fault connector handles the failure, operations that the interview executed between when it resumed and when it failed are successful. The operation that caused the interview to fail isn't successful.
- If a fault connector doesn't handle the failure, operations that the interview executed between when it resumed and when it failed are rolled back. The operation that caused the interview to fail isn't successful.
- The remaining interviews in that batch are tried.

Limitations for General Alarms

- Alarms don't support minutes or seconds.
- If an interview is waiting for an event that's set for a time in the past, Salesforce resumes the interview within one hour.

For example, a flow is configured to email an opportunity owner seven days before the close date. An interview is started for an opportunity with the close date set to today. Salesforce resumes the interview within an hour.

Limitations for Absolute Time Alarms

- Absolute time alarms are evaluated based on the time zone of the user who created the flow.

Limitations for Relative Time Alarms

- Relative time alarms are evaluated based on the organization's time zone.
- Across all your flow versions, your organization can have up to 20,000 defined relative time alarms.
- Alarms can't reference the following:
 - DATE or DATETIME fields that contain automatically derived functions, such as *TODAY* or *NOW*.
 - Formula fields that include related-object merge fields.
- If you change a date field that's referenced by an unexecuted relative time alarm in a waiting interview, Salesforce recalculates the events associated with the interview.

For example, a flow is configured to email an opportunity owner seven days before the opportunity close date and the close date is 2/20/2014. The following things could happen.

- The close date isn't updated before the interview resumes. Result: Salesforce resumes the interview on 2/13/2014 and sends the email.
 - The close date is updated to 2/10/2014 before the interview resumes. Result: Salesforce reschedules the relative time alarm and the interview resumes on 2/3/2014.
 - The close date is updated to a date in the past. Result: Salesforce recalculates the relative time alarm and resumes the interview shortly after you save the record.
- If a relative time alarm references a null date field when the interview executes the Wait element, Salesforce resumes the interview within an hour.
 - If a relative time alarm references a date field that's that has a non-null value when the flow interview executes the Wait element and it's updated to null before the alarm is processed, Salesforce resumes the interview within an hour after the date field is updated.
 - If a waiting interview has a relative time alarm and the referenced record or object is deleted, the alarm is removed from the queue. If the interview has no other events to wait for, the interview is deleted.
 - You can't archive a product or price book that's referenced in a relative or absolute time alarm in a waiting interview.
 - Lead Convert Limitations
 - You can't convert a lead that has associated relative time alarms in waiting interviews.
 - If Validation and Triggers from Lead Convert is enabled, existing operations on leads after a Wait element aren't executed during lead conversion.
 - If a campaign member based on a lead is converted before a waiting interview that's associated with that record finishes, Salesforce still executes the interview.

SEE ALSO:

[Considerations for Designing Flows](#)

[Limits and Considerations for Visual Workflow](#)

[Operators in Flow Conditions](#)

[Flow Wait Element](#)

Considerations for Managing Flows

When managing flows, consider the administration and activation limits.

Activating Flows

When you activate a new version of a flow, the previously activated version (if one exists) is automatically deactivated. Any running flow interview continues to run using the version with which it was initiated.

Deleting Flows

To delete an active flow version, first deactivate it. If a flow has any paused or waiting interviews, it can't be deleted until those interviews are finished or deleted. Flows that have never been activated can be deleted immediately.

Flow Properties

The properties for a given flow's versions automatically match the active version's properties by default. In other words, if you have three versions and you activate version 2, Salesforce updates the properties for versions 1 and

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- Developer

3 to match version 2. However, if you edit the properties for an inactive version, that version's properties are no longer automatically updated to match the active version.

The flow's active (or latest) version determines the flow's type. For example, if a flow's active version contains a screen, its type is Flow. It can't be implemented through a system-based method, like the Process Builder.

IN THIS SECTION:

[Considerations for Installed Flows](#)

Keep these considerations in mind when you distribute, upgrade, or remove a flow that you installed from a package.

SEE ALSO:

[Manage Your Flows](#)

[Limits and Considerations for Visual Workflow](#)

Considerations for Installed Flows

Keep these considerations in mind when you distribute, upgrade, or remove a flow that you installed from a package.

- The Cloud Flow Designer can't open flows that are installed from managed packages.
- If you install a package that contains multiple flow versions in a fresh destination organization, only the latest flow version is deployed.
- If you install a flow from a managed package, error emails for that flow's interviews don't include any details about the individual flow elements. The email is sent to the user who installed the flow.
- If you install a flow from an unmanaged package that has the same name but a different version number as a flow in your organization, the newly installed flow becomes the latest version of the existing flow. However, if the packaged flow has the same name and version number as a flow already in your organization, the package install fails. You can't overwrite a flow.

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- Developer

Status

An active flow in a package is active after it's installed. The previous active version of the flow in the destination organization is deactivated in favor of the newly installed version. Any in-progress flows based on the now-deactivated version continue to run without interruption but reflect the previous version of the flow.

Distributing Installed Flows

- When you create a custom button, link, or Web tab for a flow that's installed from a managed package, include the namespace in the URL. The URL format is `/flow/namespace/flowuniqueName`.
- When you embed a flow that's installed from a managed package in a Visualforce page, set the name attribute to this format: `namespace.flowuniqueName`.

Upgrading Installed Flows

Upgrading a managed package in your organization installs a new flow version only if there's a newer flow version from the developer. After several upgrades, you can end up with multiple flow versions.

Removing Installed Flows

- You can't delete a flow from an installed package. To remove a packaged flow from your organization, deactivate it and then uninstall the package.
- You can't delete flow components from Managed - Beta package installations in development organizations.

- If you have multiple versions of a flow installed from multiple unmanaged packages, you can't remove only one version by uninstalling its package. Uninstalling a package—managed or unmanaged—that contains a single version of the flow removes the entire flow, including all versions.

SEE ALSO:

[Considerations for Deploying Flows with Packages](#)

Considerations for Running Flows

When you run or test a flow, keep certain limits and guidelines in mind.

- Be careful when testing flows that contain delete elements. Even if the flow is inactive, it triggers the delete operation.
- At run time, time zones for date/time values can differ from what you see in the Cloud Flow Designer. During run time, date/time values reflect the running user's time zone settings in Salesforce.
- Interviews don't perform actions—such as sending emails or creating, editing, or deleting records—until the associated transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element. Record and Fast elements aren't the only ones to create or update records. Post to Chatter, Submit for Approval, and Quick Actions elements do, as well.
- Don't use your browser's Back or Forward buttons to navigate through a flow. Doing so can result in inconsistent data between the flow and Salesforce.
- A single flow can have up to 50 different versions. When you run a flow, you see the active version, but your admin could have a more recent version.
- For flows that interact with the Salesforce database, make sure that your users have permission to create, read, edit, and delete the relevant records and fields. Otherwise, users receive an insufficient privileges error when they try to launch a flow. For example, a flow looks up and updates a case record's status. The flow users must have "Read" and "Edit" permissions on the `Status` field of the Case object.
- When you distribute a flow, don't pass a currency field value from a Salesforce record into a flow Currency variable with a URL parameter. When a currency field is referenced through a merge field (such as `{!Account.AnnualRevenue}`), the value includes the unit of currency's symbol (for example, \$). Flow variables of type Currency can accept only numeric values, so the flow fails at run time. Instead, pass the record's ID to a flow Text variable with a URL parameter. Then in the flow, use the ID to look up that record's value for the currency field.
- If you resume a flow from Paused Flow Interviews in Salesforce1, the flow doesn't validate Currency or Number input fields when the value exceeds 18 digits.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

SEE ALSO:

[Test a Flow](#)

[Limits and Considerations for Visual Workflow](#)

Flow Accessibility

Visual Workflow is 508-compliant with a few exceptions.

- The title of the screen doesn't change when you click Next or Previous, so you might not realize you're on a new page.
- Radio button fields don't have labels. Screen readers can't distinguish between questions.
- Questions without defined prompts can read incorrectly.
- Errors are not noted when reading the fields.

SEE ALSO:

[Limits and Considerations for Visual Workflow](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
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- Developer

CHAPTER 2 Cloud Flow Designer

The Cloud Flow Designer lets you design flows without writing any code.

Watch a Demo:  [Visual Workflow Cloud Flow Designer Overview](#)

For a collection of useful resources, including videos and sample flows, open the Cloud Flow Designer and click **Get Started**.

IN THIS SECTION:

[Requirements for the Cloud Flow Designer](#)

To use the Cloud Flow Designer, you need an up-to-date browser and Adobe® Flash® Player.

[Tour the Cloud Flow Designer User Interface](#)

Before you use the Cloud Flow Designer to design flows, understand the tool's main components.

[Search Within a Flow](#)

As a flow grows and becomes more complex, it becomes more challenging to find things within it. The Cloud Flow Designer offers tools for quickly finding flow elements and resources.

[Search Within the Palette](#)

As you add more flows, actions, and Apex classes to your organization, it becomes more challenging to find a specific item in the Palette. You can, however, search in the Palette to quickly find the right element for your flow.

SEE ALSO:

[Flow Elements](#)

[Flow Resources](#)

Requirements for the Cloud Flow Designer

To use the Cloud Flow Designer, you need an up-to-date browser and Adobe® Flash® Player.

We recommend:

- Windows® Internet Explorer® versions 8 through 11, Google® Chrome™, or Mozilla® Firefox®. Internet Explorer 6 and 7 are not supported.
- Adobe® Flash® Player version 10.1 and later. The minimum version required to run the Cloud Flow Designer is 10.0.
- A minimum browser resolution of 1024x768.

EDITIONS

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Available in:

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- Performance
- Unlimited
- Developer

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Tour the Cloud Flow Designer User Interface

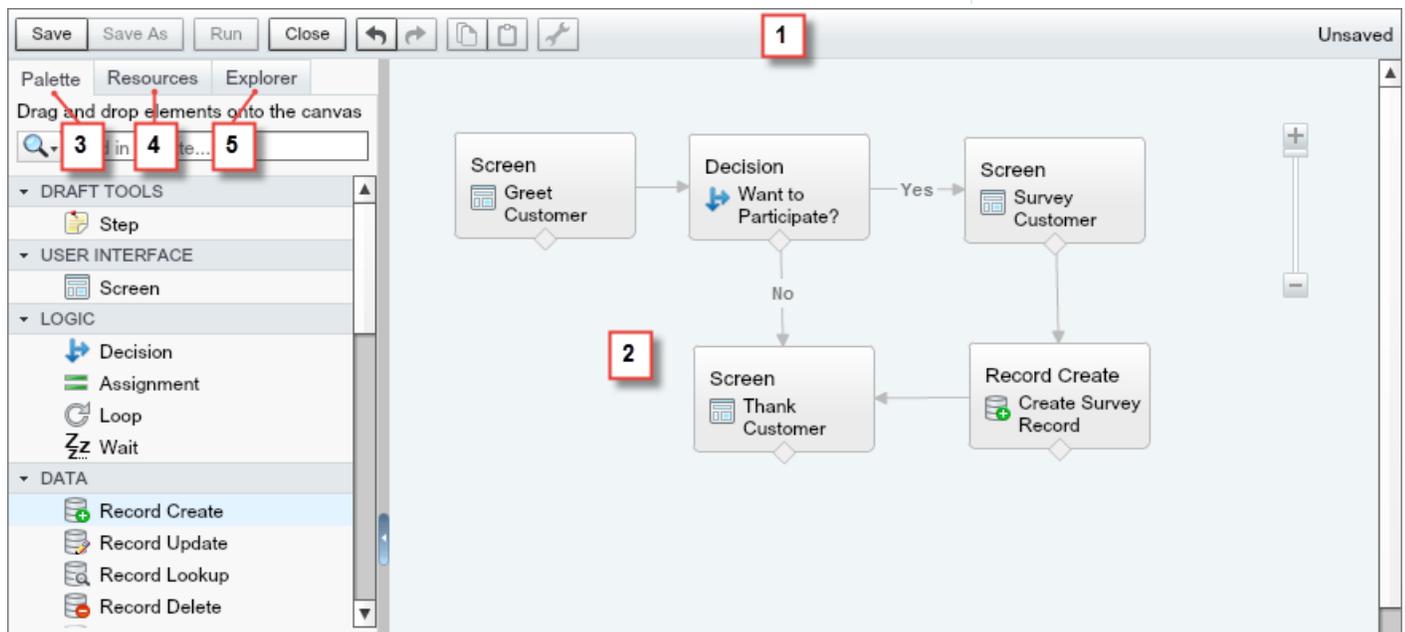
Before you use the Cloud Flow Designer to design flows, understand the tool's main components.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
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- Developer



Button Bar (1)

Manage your flow as you build it.

- **Run** runs the most recent saved version of the flow that you have open. If the flow contains subflow elements, each subflow runs the active version of its referenced flow. If the referenced flow has no active version, then the subflow element runs the latest version of its referenced flow.
- The status indicator on the right side displays whether:
 - The flow is active or not
 - The latest changes to the flow are saved or not
 - There are any warnings or errors in the last saved version of the flow
 To see a list of the warnings or errors, click the indicator.

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.

Palette Tab (3)

Add new elements, like Screens and Record Creates, to your flow from the Palette tab.

Resources Tab (4)

Create resources, like a variable or formula, to use in your flow from the Resources tab.

Explorer Tab (5)

The Explorer tab is a library of all elements and resources that you've added to the flow.

SEE ALSO:

[Flow Properties](#)

[Manage Flow Elements, Resources, and Connectors](#)

[Search Within the Palette](#)

[Search Within a Flow](#)

Search Within a Flow

As a flow grows and becomes more complex, it becomes more challenging to find things within it. The Cloud Flow Designer offers tools for quickly finding flow elements and resources.

Open the flow in the Cloud Flow Designer. Then find an element or resource in the flow by using one or more of the following options.

- On the Explorer tab, enter search text.
The Explorer tab displays only the elements and resources whose properties contain the entered text.
- Filter the Explorer tab contents to one type of element or resource by clicking .
To remove the filter, click  and select **SEARCH ALL**.
- Dim all visible elements on the canvas other than the results by selecting **Highlight Results on Canvas**.
- Zoom in and out as desired using the controls near the top right corner of the canvas area.
- To see the location of an Explorer item on the canvas, complete one of the following procedures.
If the Explorer item is a canvas-visible element or a screen field:
 1. Hover over the item on the Explorer tab.
 2. Click .
 If the Explorer item is a resource that doesn't appear on the canvas:
 1. Click the item on the Explorer tab.
 2. Click the Usage tab in the Description pane.
 3. Hover over an element listed on the Usage tab.
 4. Click its .

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USER PERMISSIONS

To open, edit, or create a flow in the Cloud Flow Designer:

- "Manage Force.com Flow"

The canvas shifts to display the element and momentarily highlights it.

SEE ALSO:

[Tour the Cloud Flow Designer User Interface](#)

Search Within the Palette

As you add more flows, actions, and Apex classes to your organization, it becomes more challenging to find a specific item in the Palette. You can, however, search in the Palette to quickly find the right element for your flow.

From the Palette tab, use the following options to find a specific item.

- Next to , enter search text. The Palette displays only the items that contain the entered text.
- To filter the Palette tab contents to one type of element, click  and select what you want to see.
- To remove the filter, click  and select **SEARCH ALL**.

SEE ALSO:

[Tour the Cloud Flow Designer User Interface](#)

EDITIONS

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USER PERMISSIONS

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CHAPTER 3 Create a Flow

Once you understand the process that you want to automate, design a flow in the Cloud Flow Designer for that process.

 **Tip:** Before you start creating your flow, plan it out. It's much easier to automate a business process by using Visual Workflow when you fully understand the details of your business process.

If you're new to the Cloud Flow Designer, we recommend walking through one or more of the sample flow tutorials in the [Cloud Flow Designer Workbook](#). They're a great way to learn about the tool and discover how it works.

1. Open the Cloud Flow Designer. From Setup, enter *Flows* in the *Quick Find* box, then select **Flows**, and then click **New Flow**.

2. Drag the appropriate [elements](#) onto the canvas.

 **Tip:** If you're not sure which element you need for a node, add a Step element as a placeholder until you figure it out. You can always replace the Step later.

3. [Connect](#) the elements together so that it's clear what the order of the elements is.

4. Identify [which element the flow should start with](#) when it runs.

5. [Save](#) any changes that you made to the flow.

6. [Test](#) the flow to make sure it's working as you expect it to.

7. [Activate](#) the flow so that users can run it.

8. Distribute the flow to the appropriate users.

SEE ALSO:

[Manage Your Flows](#)

[Considerations for Designing Flows](#)

[Flow Accessibility](#)

[Flow Building Blocks](#)

EDITIONS

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USER PERMISSIONS

To open, edit, or create a flow in the Cloud Flow Designer:

- "Manage Force.com Flow"

Set a Flow's Start Element

Before you can save a flow, indicate which element to execute first.

1. Hover over the starting element in your flow.
2. Click .

SEE ALSO:

[Save a Flow](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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USER PERMISSIONS

To open, edit, or create a flow in the Cloud Flow Designer:

- "Manage Force.com Flow"

Save a Flow

After you create a flow in the Cloud Flow Designer, you have some options for saving the flow.

Initial save

When you save a new flow for the first time, a dialog box appears. Enter values for each of the [flow's properties](#). Once you save the flow, the unique name can't be changed.

Quick save

After you've saved a flow once, the **Save** button works as a quick-save, overwriting your previous work. However, the **Save** button doesn't work when editing active flows. To save your changes as a new version or new flow, use **Save As**.

Save As

After you've saved your flow once, this button is enabled with two options:

- **Save as new flow** opens a dialog box where you can input a new name, unique name, and description, then save your changes as an entirely new flow.
- **Save as new version** saves the flow as a new version of the current flow. Use this option if you want to change a flow and keep the old configuration as a backup.

Each flow can have up to 50 versions. You can't update the unique name when you save a new version.

When saving a flow or flow version:

- If you have the flow detail page open in one browser tab, then edit a version in another tab, before you run the edited version:
 1. Save the version.
 2. Close the Cloud Flow Designer.

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Available in:

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- Unlimited
- Developer

USER PERMISSIONS

To open, edit, or create a flow in the Cloud Flow Designer:

- "Manage Force.com Flow"

3. Refresh the flow detail page in the first tab.
- If you've changed the flow properties and for some reason the flow fails to save, the flow properties don't revert to the previous values.

SEE ALSO:

[Cloud Flow Designer](#)[Activate or Deactivate a Flow Version](#)

Common Flow Tasks

A handful of tasks are common to multiple flow use cases. For example, you can define conditions in both Decision and Wait elements.

IN THIS SECTION:

[Manage Flow Elements, Resources, and Connectors](#)

Customize your flow by adding, editing, or removing elements, resources, and connectors.

[Validate Users' Inputs with Flow Formulas](#)

Just like with regular validation rules, you can validate what users enter in flow screens.

[Define Flow Conditions](#)

Control when a flow takes a specific decision outcome or waits for a specific wait event.

[Define the Path That a Flow Takes](#)

Identify which elements the flow executes and in what order by connecting the elements on your canvas together.

[Customize What Happens When a Flow Fails](#)

If your flow contains an element that interacts with the Salesforce database—such as a Record Update or Submit for Approval element, it can fail. Modify the default behavior by adding fault paths to all elements that can fail.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

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- Developer

Manage Flow Elements, Resources, and Connectors

Customize your flow by adding, editing, or removing elements, resources, and connectors.

	Add	Edit	Remove
Element	Drag from the Palette tab and drop it on to the canvas.	Double-click, or hover over it and click  .	Hover over it and click  .
Resource	From the Resources tab, double-click.	From the Explorer tab, double-click or hover over it and click  .	From the Explorer tab, hover over it and click  .
Connector	Click the node at the bottom of an element on the canvas and drag a line anywhere onto the target element.	n/a	Select it and press the DELETE key.

SEE ALSO:

[Flow Elements](#)

[Flow Resources](#)

[Flow Connectors](#)

Validate Users' Inputs with Flow Formulas

Just like with regular validation rules, you can validate what users enter in flow screens.

- The formula expression must return a Boolean value (`TRUE` or `FALSE`).
- If the expression evaluates to `TRUE`, the input is valid. If the expression evaluates to `FALSE`, the error message is displayed to the user.
- If the user leaves the field blank and the field isn't required, the flow doesn't validate the field.

When you configure a screen input field:

1. In the Input Validation section, select `validate`.
2. Define the values allowed for the field by entering a Boolean formula expression.



Note:

- The formula expression must return a Boolean value.
 - If the formula expression evaluates to `TRUE`, the input is valid.
 - If the formula expression evaluates to `FALSE`, the error message is displayed to the user.
 - If the user leaves the field blank, and the field is *not* required, the flow doesn't validate.
3. Customize the error message that appears if the user's input fails validation.

Click  to switch between the plain text editor and the rich text editor. Using the rich text editor saves the content as HTML.

EDITIONS

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USER PERMISSIONS

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Example:

- Validate the format of an email address:

```
REGEX({!Email_Address}, "[a-zA-Z0-9._%+-]+@[a-zA-Z0-9.-]+\.[a-zA-Z]{2,4}")
```

- Validate the format of a zip code:

```
REGEX({!Zipcode}, "\d{5}(-\d{4})?")
```

Define Flow Conditions

Control when a flow takes a specific decision outcome or waits for a specific wait event.

Before you begin, create the Decision or Wait element to add conditions to. To add conditions to a wait event, select **Wait for this event only if additional conditions are met**.

1. Set up the conditions.

At run time, the conditions are evaluated in the order you specify.

Column Header	Description
Resource	Flow resource whose value you want to evaluate.
Operator	The available operators depend on the data type selected for Resource. For details, see Operators in Flow Conditions on page 97.
Value	<p>The Variable and Value in the same row must have compatible data types.</p> <p>Options:</p> <ul style="list-style-type: none"> • Select an existing flow resource, such as a variable, constant, or user input. • Select CREATE NEW to create a flow resource. • Manually enter a literal value or merge field. <p> Note: When you add or subtract a number from a date value, the date adjusts in days, not hours.</p>

2. Identify the logic between the conditions.

Option	Description
All conditions must be true (AND)	If one of the conditions is false, the flow evaluates the next outcome's conditions.
One condition must be true (OR)	If one of the conditions is true, the flow immediately takes this outcome's path.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To open, edit, or create a flow in the Cloud Flow Designer:

- "Manage Force.com Flow"

Option	Description
Advanced logic (Combination of ANDs and ORs)	<p>Custom logic.</p> <p>When you select this option, provide the customized <code>Logic</code> by entering a text string. Use:</p> <ul style="list-style-type: none"> • Numbers to refer to each condition • AND or OR to identify whether all or just one of the conditions must true • Parentheses to group parts of the string together <p> Tip: If you enter <code>AND</code>, it's the same as if you selected All conditions must be true (AND). If you enter <code>OR</code>, it's the same as if you selected One condition must be true (OR). If you enter any other logic, make sure that you include a number for each condition.</p> <p>For example, for <code>1 AND (2 OR 3)</code>, the flow evaluates whether the first condition is true and either the second or third condition is true.</p>

SEE ALSO:

[What Are Waiting Conditions?](#)[Flow Wait Element](#)[Flow Decision Element](#)

Send Email from a Flow

To send email from your flow, either call an email alert workflow action or create the email in the 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.

Send Email element

Sends an email by manually specifying the subject, body, and recipients in the flow.

SEE ALSO:

[Flow Elements](#)

Invoke Apex Code from a Flow

The Cloud Flow Designer comes with a lot of functionality, but sometimes your flow needs to do more than the default elements allow. In that case, call an Apex class from your flow by using one of two flow elements: Apex Plug-in and Call Apex.

Developers have two options when they're trying to make an Apex class available for a flow.

 **Tip:** We recommend using the `@InvocableMethod` annotation instead of the `Process.Plugin` interface.

While the `Process.Plugin` interface supports customizing how the class appears in the palette, the `@InvocableMethod` annotation provides more functionality. The following table describes the features supported by each option.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

	Process.Plugin Interface	@InvocableMethod Annotation
Apex data type support	Doesn't support: <ul style="list-style-type: none"> • Blob • Collection • sObject • Time 	Doesn't support: <ul style="list-style-type: none"> • Generic Object • Generic sObject • Sets • Maps • Enums <p>The Cloud Flow Designer doesn't support mapping an Apex method's input or output parameters to an sObject collection variable.</p>
Bulk operations	Not supported	Supported
Element name in the Cloud Flow Designer	Class name or the value of the name property.	Class name
Reusability	Classes with this interface implemented are available in flows	Classes with this annotation implemented are available in: <ul style="list-style-type: none"> • Flows • Processes • Rest API
Section in the Cloud Flow Designer	Apex Plug-in or the value of the tag property.	Apex
More Details in the Force.com Apex Code Developer's Guide	Passing Data to a Flow Using the Process.Plugin Interface	InvocableMethod Annotation and InvocableVariable Annotation



Example: To illustrate the difference between these two implementation methods, here are two classes that do the same thing: get an account name from a flow and return that account's ID.

This class implements the @InvocableMethod annotation.

```
global class lookUpAccountAnnotation {
    @InvocableMethod
    public static List<String> getAccountIds(List<String> names) {
        List<Id> accountIds = new List<Id>();
        List<Account> accounts = [SELECT Id FROM Account WHERE Name in :names];
        for (Account account : accounts) {
            accountIds.add(account.Id);
        }
        return accountIds;
    }
}
```

This class implements the `Process.Plugin` interface.

```
global class lookupAccountPlugin implements Process.Plugin {

    global Process.PluginResult invoke(Process.PluginRequest request) {
        String name = (String) request.inputParameters.get('name');
        Account account = [SELECT Id FROM Account WHERE Name = :name LIMIT 1][0];

        Map<String, Object> result = new Map<String, Object>();
        result.put('accountId', account.Id);
        return new Process.PluginResult(result);
    }

    global Process.PluginDescribeResult describe() {
        Process.PluginDescribeResult result = new Process.PluginDescribeResult();
        result.Name = 'Look Up Account ID By Name';
        result.Tag = 'Account Classes';
        result.inputParameters = new
            List<Process.PluginDescribeResult.InputParameter>{
                new Process.PluginDescribeResult.InputParameter('name',
                    Process.PluginDescribeResult.ParameterType.STRING, true)
            };
        result.outputParameters = new
            List<Process.PluginDescribeResult.OutputParameter>{
                new Process.PluginDescribeResult.OutputParameter('accountId',
                    Process.PluginDescribeResult.ParameterType.STRING)
            };
        return result;
    }
}
```

Notice that `lookupAccountAnnotation` is less than half the length (11 lines) of `lookupAccountPlugin` (28 lines). In addition, because the annotation supports bulk operations, `lookupAccountAnnotation` performs one query per batch of interviews. `lookupAccountPlugin` performs one query per interview.

SEE ALSO:

[Flow Elements](#)

View Inputs and Outputs of Other Referenced Flow Versions

While configuring a subflow element, view the variables of a specified version of the referenced flow. Doing so lets you configure draft master and referenced flows at the same time.

From a subflow element, you can assign values to only the referenced flow's variables that allow input access. Similarly, you can assign values from only the referenced flow's variables that allow output access. The `Input/Output Type` of the variable determines this access. To change the variable's `Input/Output Type`, open the referenced flow to [edit the variable](#).

By default, this drop-down list contains the variables of the currently active version of the referenced flow. If the referenced flow has no active version, the drop-down list contains the variables of the *latest* version of the referenced flow.

To populate the drop-down lists with the variables of another version of the referenced flow, complete the following steps. Do the same to view the descriptions of the referenced flow's variables.

1. On the subflow overlay, expand the `Input/Output Variable Assignments` section.
2. Click **View input/output of other versions**.
3. Use one or more of the following options.

Option	Description
Select a <code>Version</code> number in the left pane.	The Inputs and Outputs tabs display the variables in the selected version of the referenced flow.
Select the Inputs tab or the Outputs tab.	The tab displays: <ul style="list-style-type: none"> • The variables available for input or output assignment in the selected <code>Version</code> of the referenced flow. • The data type of each variable. • The description, if any, of each variable.
Click OK .	The subflow overlay's drop-down lists for selecting the referenced flow's variables are populated with the variables of the selected <code>Version</code> of the referenced flow.

When you configure subflow input and output assignments, you can specify variables from any version of the referenced flow. This way, you can develop both the master flow and referenced flow in parallel, while keeping another version of the referenced flow active for its users. When you *save* the master flow, however, the Cloud Flow Designer validates against the currently active version of the referenced flow. If that flow doesn't have an active version, the latest version is validated. If you see validation messages about variables that couldn't be found or that were configured differently in the referenced flow, you can still save the flow. Nevertheless, resolve all validation errors before you *activate* the master flow.

SEE ALSO:

[Flow Subflow Element](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To open, edit, or create a flow in the Cloud Flow Designer:

- "Manage Force.com Flow"

Add Values to a Collection Variable

After you create a collection variable, populate it with values to reference throughout your flow. You can't use a Record Lookup or Fast Lookup element to populate a collection variable, but there are some workarounds.

To use values from outside the flow, set the collection variable's `Input/Output Type` to "Input" and then use URL parameters, Visualforce controllers, or subflow inputs. When the values are coming from outside the flow, the values can be set only at the start of the flow interview.

To add values that are stored in...	Do this...	For more information
A screen field	Add the field's entered or stored value to a collection variable by using an Assignment element	<ul style="list-style-type: none"> Choice fields Input fields Output fields Assignments
A variable	Add the variable's stored value to a collection variable by using an Assignment element	<ul style="list-style-type: none"> Variables Assignments
An sObject variable	Add one of the sObject variable's stored field values to a collection variable by using an Assignment element	<ul style="list-style-type: none"> sObject variables Assignments
An sObject collection variable	Loop through the sObject collection variable. Within the loop, add one of the loop variable's stored field values to a collection variable by using an Assignment element	<ul style="list-style-type: none"> sObject collection variables Loops Assignments

SEE ALSO:

[Flow Collection Variable Resource](#)

[Sample Flow That Populates a Collection Variable](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Define the Path That a Flow Takes

Identify which elements the flow executes and in what order by connecting the elements on your canvas together.

1. On the canvas, find the node at the bottom of the source element.
2. Drag the node onto the target element.
3. If prompted, select which outcome to assign to the path.

SEE ALSO:

[Remove Connectors from a Flow](#)

[Flow Connectors](#)

[Customize What Happens When a Flow Fails](#)

Remove Connectors from a Flow

You can't modify a connector's target or source elements, so to change a path, delete the connector and then add a new one.

If you delete a connector for a specific outcome, the outcome isn't deleted from the source element. However, if you delete an outcome from a decision element, the outcome's connector is also deleted.

1. In your flow, select the connector to delete.

When you select a connector, its color changes from gray to green. If you're having trouble selecting a connector, click and drag an area on the canvas that includes the connector.
2. Press DELETE.

SEE ALSO:

[Define the Path That a Flow Takes](#)

[Flow Connectors](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To open, edit, or create a flow in the Cloud Flow Designer:

- "Manage Force.com Flow"

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To open, edit, or create a flow in the Cloud Flow Designer:

- "Manage Force.com Flow"

Customize What Happens When a Flow Fails

If your flow contains an element that interacts with the Salesforce database—such as a Record Update or Submit for Approval element, it can fail. Modify the default behavior by adding fault paths to all elements that can fail.

IN THIS SECTION:

[What Happens When a Flow Fails?](#)

When you're deciding whether to customize the error handling in your flow, consider how a failed flow behaves by default.

[Configure Every Fault Path to Send You an Email \(Best Practice\)](#)

As a best practice, we recommend configuring the fault connectors in your flow so that you always receive an email when a flow fails. In the email, include the current values of all your flow's resources. The resource values can give you insight into why the flow failed.

[Customize the Error Message for Running Flow Users \(Best Practice\)](#)

As a best practice, we recommend displaying a better message to your user than "An unhandled fault has occurred in this flow". Do this only if the distribution method you're using supports flows that contain screens. In other words, don't do it if your flow is distributed through a process.

[Other Examples of Error Handling in Flows](#)

Examples of using fault connectors to handle flow errors include requesting corrections from the user and bypassing the error.

SEE ALSO:

[Flow Connectors](#)

[Flow Elements](#)

[Define the Path That a Flow Takes](#)

What Happens When a Flow Fails?

When you're deciding whether to customize the error handling in your flow, consider how a failed flow behaves by default.

Here's what happens by default.

- This error message displays to the running user—the user who was running the flow.

An unhandled fault has occurred in this flow

An unhandled fault has occurred while processing the flow. Please contact your system administrator for more information.

- The running user can't proceed with the flow or return to a previous part of the flow.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

- The admin who created the flow receives a fault email. The email details the element that failed, the error message from that element, and which elements were executed during the failed interview. Here's an example error message that can appear in a fault email.

```
An error occurred at element Fast_Delete_1.
DELETE --- There is nothing in Salesforce matching your
delete criteria.
```

SEE ALSO:

[Customize What Happens When a Flow Fails](#)

Configure Every Fault Path to Send You an Email (Best Practice)

As a best practice, we recommend configuring the fault connectors in your flow so that you always receive an email when a flow fails. In the email, include the current values of all your flow's resources. The resource values can give you insight into why the flow failed.

1. Create a text template that includes the values of all the flow resources.

Doing so lets you see the exact values of flow variables when the interview failed. Also, if the flow contains screens, you see exactly what the user entered and selected.

Here's an example text template for the Customer Satisfaction Survey flow in the Cloud Flow Designer Workbook.

```
Error: {!$Flow.FaultMessage}

RESOURCE VALUES
Customer Response: {!Customer_Response}
Value of Decision's Yes outcome: {!Yes}
Company: {!Company_Name}
Satisfaction Choice Field: {!Satisfaction}
Service Choice Field: {!Service}
Other Comments:
{!OtherComments}
```

2. Configure a Send Email element. Use the text template as the body and your email address as the recipient. In this example, Body is set to the text template we created: `{!allVariableValues}`.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

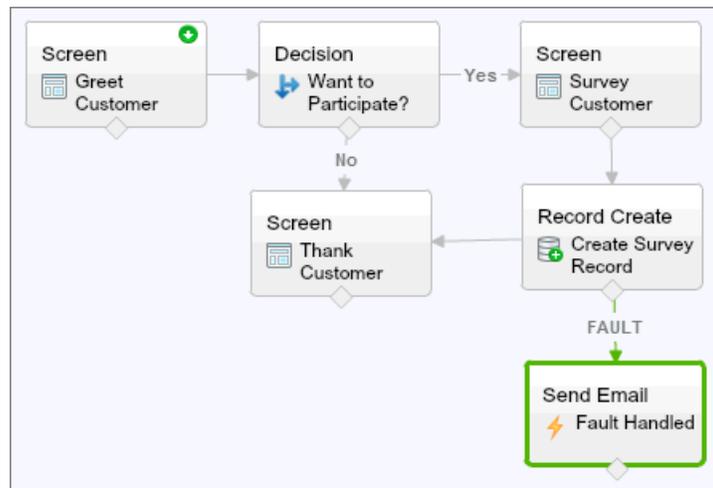
USER PERMISSIONS

To open, edit, or create a flow in the Cloud Flow Designer:

- "Manage Force.com Flow"

Target	Source
Body	{!allVariableValues} i
Subject	An error occurred in the Customer Satis i
Email Addresses (comma-separated)	flowadmin@salesforce.com i

- From each element that can fail, draw a fault connector to the Send Email element.
In this example, Record Create is the only element that supports fault connectors.



SEE ALSO:

- [Flow Text Template Resource](#)
- [Flow Send Email Element](#)
- [Customize What Happens When a Flow Fails](#)

Customize the Error Message for Running Flow Users (Best Practice)

As a best practice, we recommend displaying a better message to your user than “An unhandled fault has occurred in this flow”. Do this only if the distribution method you’re using supports flows that contain screens. In other words, don’t do it if your flow is distributed through a process.

1. Create a text template that contains a friendlier error message.

```
<FONT FACE="Arial" STYLE="font-size:14px">  
<B>Something went wrong with this flow.</B>  
</FONT>  
<P>Your admin has received an email about this error.</P>
```

2. Add a Screen element. In a Display Text field, reference the text template.
3. For every element that can fail, draw a fault connector to the Screen element.
In this example, Record Create is the only element that supports fault connectors. After the flow displays the better error message to the user, it sends an email to the admin with debugging information.

SEE ALSO:

[Flow Screen Element: Display Text Fields](#)

[Flow Text Template Resource](#)

[Customize What Happens When a Flow Fails](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To open, edit, or create a flow in the Cloud Flow Designer:

- “Manage Force.com Flow”

Other Examples of Error Handling in Flows

Examples of using fault connectors to handle flow errors include requesting corrections from the user and bypassing the error.

Request Corrections from Users

Draw a fault connector to a Screen element, where users can verify the values that they entered, make corrections, and proceed.

Display the Error Message

If the flow is used only internally, such as at a call center, use the fault path to display the error message to the running user. In the same Screen element, ask the user to report the error to the IT department. To do so, draw the fault connector to a Screen element with this Display Text field.

```
Sorry, but you can't read or update records at this time.
Please open a case with IT and include this error message:
{!$Flow.FaultMessage}
```

Create a Case

When an error occurs, automatically create a case that includes the error message and assign it to your IT department. Assign the created case's ID to a Text variable (`{! caseId}`, for example). Then, in a Screen, display this message to the running user.

```
Sorry, but you can't read or update records at this time.
We filed a case for you.
```

Ignore Errors

To bypass errors for a given element in your flow, draw the fault connector to the same element as the normal connector.

SEE ALSO:

[Customize What Happens When a Flow Fails](#)

Flow Reference

Bookmark this page for quick access to information about flow elements, resources, events, and more.

IN THIS SECTION:

[Flow Elements](#)

Each *element* represents an action that the flow can execute. Examples of such actions include reading or writing Salesforce data, displaying information and collecting data from flow users, executing business logic, or manipulating data.

[Flow Resources](#)

Each *resource* represents a value that you can reference throughout the flow.

[Cross-Object Field References in Flows](#)

When building a flow, you can reference fields for records that are related to the values that are stored in an sObject variable. To do so, manually enter the references.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Flow Connectors

Connectors determine the available paths that a flow can take at run time. In the Cloud Flow Designer canvas, a connector looks like an arrow that points from one element to another.

Flow Operators

Operators behave differently, depending on what you're configuring. In Assignment elements, operators let you change resource values. In flow conditions and record filters, operators let you evaluate information and narrow the scope of a flow operation.

Flow Event Types

Event Type drives the fields that you use to define an event in a flow Wait element. The available event types are both alarms, which consist of a date/time value—the base time—and an optional offset from that time.

Flow Types

A flow or flow version's type determines which elements and resources are supported, as well as the ways that the flow can be distributed.

Flow Properties

A flow's properties consist of its name, description, interview label, and type. These properties drive the field values that appear on a flow or flow version's detail page. The properties of a flow and its flow versions are separate.

Flow Elements

Each *element* represents an action that the flow can execute. Examples of such actions include reading or writing Salesforce data, displaying information and collecting data from flow users, executing business logic, or manipulating data.

In the Cloud Flow Designer, the canvas and Explorer tab display the elements that exist in the flow. The Palette tab displays the available element types that you can add to the flow by dragging them onto the canvas.

IN THIS SECTION:

General Settings for Flow Elements

Every flow element has three settings in common: name, unique name, and description.

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 Call Apex Element

Calls an Apex class's invocable method.

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.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

[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 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.

[Flow Send Email Element](#)

Sends an email by manually specifying the subject, body, and recipients in the flow.

[Flow Step Element](#)

Acts as a placeholder when you're not sure which element you need.

[Flow Submit for Approval Element](#)

Submits one Salesforce record for approval.

[Flow Subflow Element](#)

Calls another flow in your organization. Use this element to reference modular flows and simplify the overall architecture of your flow.

[Flow Wait Element](#)

Waits for one or more defined events to occur, which lets you automate processes that require a waiting period.

SEE ALSO:

[Flow Resources](#)[Cloud Flow Designer](#)

General Settings for Flow Elements

Every flow element has three settings in common: name, unique name, and description.

Field	Description
Name	Helps you identify the element on the canvas.
Unique Name	<p>Automatically populated if empty when you fill out the <code>Name</code> field and press TAB.</p> <p>The requirement for uniqueness applies only to elements within the current flow. Two elements can have the same unique name, provided they are used in different flows. A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.</p>
Description	Appears after you click Add Description .

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

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.

 **Tip:**

- Apex classes appear in the palette as Apex plug-ins only if the `Process.Plugin` interface has been implemented.
- If you have many plug-ins in your organization, ask your developer to use the `tag` property. The class appears under a special section header in the palette. Otherwise, the class appears with all the other Apex plug-ins.
- If your developer hasn't already implemented the `Process.Plugin` interface on the desired class, we recommend using the `@InvocableMethod` annotation instead. Unlike the `Process.Plugin` interface, the `@InvocableMethod` annotation supports `sObject`, `Collection`, `Blob`, and `Time` data types and bulkification. It's also much easier to implement. To see a complete comparison between the interface and the annotation, see [Invoke Apex Code from a Flow](#) on page 33.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Inputs

Pass information from the flow to the invoked Apex method. The method determines the available input parameters.

Outputs

Pass information from the invoked Apex method to the flow. The method determines the available output parameters.

The flow assigns the values to the specified variables when the code is executed.

Usage



Note: If the Apex class creates, updates, or deletes a record, the action isn't performed until the interview's transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

SEE ALSO:

[Invoke Apex Code from a Flow](#)

[Customize What Happens When a Flow Fails](#)

[Define the Path That a Flow Takes](#)

[Cross-Object Field References in Flows](#)

[Force.com Apex Code Developer's Guide: Process Namespace](#)

Flow Assignment Element

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

In each row, specify the `Variable` whose value you want to change and the new `Value` for that variable. At run time, the variable assignments occur in the order you specify.

Column Header	Description
Variable	Variable whose value you want to change.
Operator	The available operators depend on the data type selected for the Variable.
Value	<p>The Variable and Value in the same row must have compatible data types.</p> <p>Options:</p> <ul style="list-style-type: none"> Select an existing flow resource, such as a variable, constant, or user input. Select CREATE NEW to create a flow resource. Manually enter a literal value or merge field.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

 **Example:** Change the value of a customer’s credit score based on how the customer answered questions in the flow.

SEE ALSO:

- [Flow Elements](#)
- [Operators in Flow Assignment Elements](#)
- [Define the Path That a Flow Takes](#)
- [Flow Resources](#)
- [Cross-Object Field References in Flows](#)

Flow Call Apex Element

Calls an Apex class’s invocable method.

 **Important:** To use this element to call an Apex class from a flow, ask your developer to annotate one of the class’s methods with `@InvocableMethod`. For details, see “`InvocableMethod` Annotation” in the *Force.com Apex Code Developer’s Guide*.

Inputs

Pass information from the flow to the invoked Apex method. The method determines the available input parameters.

Outputs

Pass information from the invoked Apex method to the flow. The method determines the available output parameters. The flow assigns the values to the specified variables when the method is executed.

Usage

 **Note:** If the invoked method creates, updates, or deletes a record, that action isn’t performed until the interview’s transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

SEE ALSO:

- [Invoke Apex Code from a Flow](#)
- [Customize What Happens When a Flow Fails](#)
- [Define the Path That a Flow Takes](#)
- [Cross-Object Field References in Flows](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

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.

Outcomes

Create the outcomes for the decision. To rename the path that the flow takes when none of the other outcome conditions are met, click **[Default Outcome]**. Set up the conditions.

Field	Description
Name	Identifies the connector for this outcome on the canvas.
Unique Name	The requirement for uniqueness applies only to elements within the current flow. Two elements can have the same unique name, provided they are used in different flows. A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Conditions	Determines whether the flow takes this outcome's path.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer



Example: Using a Decision element, determine whether:

- To give customers a return shipping address (because an item is definitely faulty) or instructions on how to resolve the problem
- To offer a customer a loan or not (based on results of a credit scoring formula)



Tip: Configure your flow so that it does different things based on which option a user selected for a screen's drop-down list. To do so, add a decision after the screen to create the branches of the flow based on the choices available in that drop-down list. Then you can represent each choice in your decision and connect it to a branch of your flow.

SEE ALSO:

[Flow Elements](#)

[Define Flow Conditions](#)

[Operators in Flow Conditions](#)

[Define the Path That a Flow Takes](#)

[Cross-Object Field References in Flows](#)

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.

Before you begin:

- Make sure that the email alert you want to call from your flow exists. If not, create the email alert.
- Understand the daily limits for emails sent from email alerts.
- Store the ID for the record that you want to reference in this email, such as by using a Fast Lookup element. If the email alert has any merge fields, the referenced record is the starting point for those fields.

The unique name for each email alert is prefixed with its object. The object type of the referenced record must match the object type of the email alert. For example, if you have an email alert with unique name "Owner_Changed" for accounts, that email alert appears in the Palette as `Account.Owner_Changed`. Because the email alert is associated with the Account object, it can reference only an account record.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Field	Description
Record ID	Select a variable that contains the ID for the record that you want the email to reference. If the email alert uses any merge fields, this record is the starting point for those merge fields. For example, if you stored the record ID in an sObject variable called <code>storeAccount</code> , the value is <code>{!storeAccount.Id}</code> .

Usage

 **Note:** At run time, the email isn't sent until the interview's transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

SEE ALSO:

[Send Email from a Flow](#)

[Customize What Happens When a Flow Fails](#)

[Define the Path That a Flow Takes](#)

[Cross-Object Field References in Flows](#)

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.

To create a single record with field values from regular variables and other flow resources, such as constants, formulas, and screen fields, use [Record Create](#).

Field	Description
Variable	<p>The sObject variable or collection that you want to use to create the record or multiple records. The object types must match, and each ID field must not have a value.</p> <p>If you used an sObject variable to create a single record, the sObject variable's ID field is updated with the new record's ID value. If you used an sObject collection to create multiple records, the ID field of each collection item is updated with its matching new record ID value.</p>

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer



Example: Take a collection of new cases and use a Fast Create element to create records for each case in the collection. Make sure that your flow populates the sObject variable or collection with all required field values before executing the Fast Create element.

Usage



Note: At run time, records aren't created until the interview's transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

SEE ALSO:

[Flow Elements](#)

[Customize What Happens When a Flow Fails](#)

[Define the Path That a Flow Takes](#)

[Flow sObject Variable Resource](#)

[Flow sObject Collection Variable Resource](#)

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.



Tip: Make sure that the sObject variable or collection is populated with ID values before using the Fast Delete element.

Field	Description
Variable	Identifies the sObject variable or collection that you want to use to delete records. The variable must include the IDs of the records that you want to delete.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Usage

Warning:

- Be careful when testing flows that contain delete elements. Even if the flow is inactive, it triggers the delete operation.
- To prevent deleting records by mistake, be as specific in your filter criteria as possible.
- Records are deleted from your organization the moment the flow executes the delete element.
- Deleted records are sent to the Recycle Bin and remain there for 15 days before they are permanently deleted.
- Flows can delete records that are in an approval process.

To delete one or more records that meet filter criteria specified by regular variables and other flow resources, such as constants, formulas, and screen fields, use [Record Delete](#).

 **Note:** At run time, the records aren't deleted until the interview's transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

SEE ALSO:

[Flow Elements](#)

[Customize What Happens When a Flow Fails](#)

[Define the Path That a Flow Takes](#)

[Flow sObject Variable Resource](#)

[Flow sObject Collection Variable Resource](#)

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.

Field	Description
Look up	Identifies the object whose records you want to look up.
Filter criteria	<p>Narrows down the scope of records that the flow looks up. Specify the filter criteria for selecting the record from the database.</p> <p> Tip: Make sure that your filter criteria sufficiently narrows the search. If you use an sObject variable to store the results, the Fast Lookup element returns only the first record from the filtered results.</p> <p>The available filter operators depend on the data type of the selected fields. For details, see Operators in Flow Record Filters. <code>Value</code> must be compatible with the selected field's data type.</p>
Sort results by:	Sorts the filtered results before any records are stored in the variable. If you select this field, select the field that you want to sort the results by and the sort order. Only sortable fields are available.
Variable	<p>The variable to contain the returned field values.</p> <ul style="list-style-type: none"> • To contain the field values for the first returned record, use an sObject variable.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Field	Description
	<ul style="list-style-type: none"> To contain the field values for all the returned records, use an sObject collection variable.
Assign null to the variable if no records are found.	Sets the variable to null if no records meet the filter criteria. By default, the variable's values are left unchanged.
Specify which of the record's fields to save in the variable.	Identifies which fields on the records that meet the filter criteria to store in the variable. Values for unselected fields are set to null in the variable.

Example:

- Look up a product's name and description by using the bar code on its product tag.
- Look up all customers who live in a particular city.
- Look up customer transactions on a particular day.

Usage

To get a single record and store specified field values in regular variables and sObject variables, use [Record Lookup](#).

SEE ALSO:

- [Flow Elements](#)
- [Operators in Flow Record Filters](#)
- [Customize What Happens When a Flow Fails](#)
- [Define the Path That a Flow Takes](#)
- [Flow sObject Variable Resource](#)
- [Flow sObject Collection Variable Resource](#)
- [Cross-Object Field References in Flows](#)

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.

Field	Description
Variable	Identifies the sObject variable or collection that you want to use to update records. The sObject variable or collection must be the same object type as the records being updated. That is, if you're updating several account records, use an sObject collection of type account. This practice ensures that the fields in the records match the fields in the sObject variable or collection.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

 **Example:** You're designing flows for a call center. To automatically update Salesforce with data collected from callers, such as new addresses or product preferences, use a Fast Update element. Have your flow populate the sObject variable or collection before using the Fast Update element. Then make sure that the sObject variable or sObject values within the collection contain the ID for the records that are being updated.

Usage

To update one or more records with field values from regular variables and other flow resources, such as constants, formulas, and screen fields, use [Record Update](#).

 **Note:** At run time, records aren't updated until the interview's transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

SEE ALSO:

[Flow Elements](#)

[Customize What Happens When a Flow Fails](#)

[Define the Path That a Flow Takes](#)

[Flow sObject Variable Resource](#)

[Flow sObject Collection Variable Resource](#)

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.

A *collection* is a list of items that contain, for example, field values from Salesforce records. A loop uses an sObject variable, referred to as the *loop variable*, to contain the values for the current item in the collection. Once the loop finishes examining an item, it copies the field values for the next item into the loop variable. Then the loop examines those values. The loop variable must have the same object type as the collection. For example, if your collection contains field values from accounts, your loop variable must also be of type Account.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Field	Description
Loop through	The collection that you want to loop through.
Order	<code>Ascending</code> begins at the start of the collection and moves to the end, while <code>Descending</code> begins at the end and moves to the start.
Loop Variable	The variable that the flow uses to contain the current item's values during a loop iteration. If the loop is iterating over a non-sObject collection variable, this variable must have the same data type. If the loop is iterating over an sObject collection variable, this variable must have the same object type.

Usage

After you add a Loop element and the elements that you want the loop to include, from the Loop element:

- Determine which element to execute first when a new item's values are copied into the loop variable by adding a "Next element" connector.
- Determine which flow element to execute after the loop has processed all the items in the collection by adding an "End of loop" connector.

SEE ALSO:

[Sample Flow That Loops Through a Collection](#)

[Define the Path That a Flow Takes](#)

[Flow Elements](#)

[Flow sObject Collection Variable Resource](#)

Flow Record Create Element

Creates one Salesforce record by using individual field values that you specify.

Field	Description
Create	The object for which you want to create a record
Field values	Identifies the field values for the new record. Each value must match the selected field's data type.  Important: Ensure that all required fields are populated with values; otherwise the flow fails at run time. If you don't know which fields are required, check the object definition.
Variable	Assigns the ID of the new record to a variable so you can reference it later in the flow.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

 **Example:** A user enters a name and address into the flow. Verify that a matching user exists by using the Record Lookup element. If a matching contact doesn't exist, create a record for that user by using the Record Create element.

Usage

To create a single record with all field values from one sObject variable, or multiple records with all field values from an sObject collection, use [Fast Create](#).



Note: At run time, the record isn't created until the interview's transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

SEE ALSO:

- [Operators in Flow Record Filters](#)
- [Customize What Happens When a Flow Fails](#)
- [Define the Path That a Flow Takes](#)
- [Flow Elements](#)

Flow Record Delete Element

Deletes all Salesforce records that meet specified criteria.

Field	Description
Delete	Identifies the object whose records you want to delete.
Filter Criteria	Narrows down the scope of records that the flow deletes.

Usage



Warning:

- Be careful when testing flows that contain delete elements. Even if the flow is inactive, it triggers the delete operation.
- To prevent deleting records by mistake, be as specific in your filter criteria as possible.
- Records are deleted from your organization the moment the flow executes the delete element.
- Deleted records are sent to the Recycle Bin and remain there for 15 days before they are permanently deleted.
- Flows can delete records that are in an approval process.

To delete a single record identified by the ID in one sObject variable, or delete multiple records identified by the IDs in an sObject collection, use [Fast Delete](#).



Note: At run time, the record isn't deleted until the interview's transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

SEE ALSO:

- [Operators in Flow Record Filters](#)
- [Customize What Happens When a Flow Fails](#)
- [Define the Path That a Flow Takes](#)
- [Flow Elements](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

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.

Field	Description
Look up	Identifies the object whose records you want to look up.
Filter criteria	<p>Narrows down the scope of records that the flow looks up. Specify the filter criteria for selecting the record from the database.</p> <p> Tip: Make sure that your filter criteria sufficiently narrows the search. The Record Lookup element returns only the first record from the filtered results.</p> <p>The available filter operators depend on the data type of the selected fields. For details, see Operators in Flow Record Filters. <code>Value</code> must be compatible with the selected field's data type.</p>
Sort results by:	Sorts the filtered results before any records are stored in the variable. If you select this field, select the field that you want to sort the results by and the sort order. Only sortable fields are available.
Assign the record's fields to variables to reference them in your flow.	Select fields from the returned record, and assign the values to variables in the flow.
Assign null to the variable(s) if no records are found.	Sets the variables to null if no records meet the filter criteria. By default, the variable's values are left unchanged.
Specify which of the record's fields to save in the variable.	Identifies which fields on the records that meet the filter criteria to store in the variable. Values for unselected fields are set to null in the variable.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

 **Example:** Use a Record Lookup element to:

- Input (or read) a bar code from a product tag. Use the code to find out the product name or description from the database.
- Look up item details to check your stock for availability.
- Look up a customer record to verify a caller's identity.

Usage

Use a [Fast Lookup](#) element to find:

- A single record and store specified field values in an sObject variable, or
- Multiple records and store specified field values in an sObject collection

SEE ALSO:

[Operators in Flow Record Filters](#)

[Flow Elements](#)

[Customize What Happens When a Flow Fails](#)

[Define the Path That a Flow Takes](#)

[Cross-Object Field References in Flows](#)

Flow Record Update Element

Finds all Salesforce records that meet specified criteria and updates them with individual field values that you specify.

Field	Description
Update	Identifies the object whose records you want to update.
Filter criteria	<p>Narrows down the scope of records that the flow updates.</p> <p> Important: Configure at least one filter, or the flow updates all the records for the object.</p> <p>The available filter operators depend on the data type of the selected fields. For details, see Operators in Flow Record Filters. <code>Value</code> must be compatible with the selected field's data type.</p>
Update record fields ...	Identifies which fields to update on the records that meet the filter criteria, as well as the new values.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

 **Example:** Automatically update Salesforce with data collected from customers, such as new addresses or product preferences.

Usage

Use [Fast Update](#) to:

- Update a single record with all field values from an sObject variable, or
- Update multiple records with all field values from an sObject collection

 **Note:** At run time, the record isn't updated until the interview's transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

SEE ALSO:

[Operators in Flow Record Filters](#)
[Customize What Happens When a Flow Fails](#)
[Define the Path That a Flow Takes](#)
[Flow Elements](#)

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.

The unique name for each object-specific action is prefixed with the object it's associated with. The unique name for each global action has no prefix.

Field	Description
Related Record ID	Only for object-specific actions. The ID of the record from which the action executes. For example, the action creates a case that's associated with a given account. Assign the ID for that account to <code>Related Record ID</code> .
Input Parameter	Varies for each action. Required parameters appear by default and can't be removed. The action layout determines which parameters are required. If a required field has a default or predefined value, that field is optional in object-specific and global actions in the flow. If you later remove the field's default or predefined value and you didn't set a value in the flow, the interview fails at run time.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

 **Example:** Your organization has an object-specific action that creates a case record on an account. The flow calls that action at run time and uses input assignments to transfer data from the flow to the action.

 **Note:** At run time, the record isn't created or updated until the interview's transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

SEE ALSO:

[Flow Elements](#)
[Customize What Happens When a Flow Fails](#)
[Define the Path That a Flow Takes](#)
[Cross-Object Field References in Flows](#)

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.

Inputs

Input Parameter	Description
Community ID	<p>ID of a community to post to.</p> <p>Valid only if Salesforce Communities is enabled. Required if posting to a user or Chatter group that belongs to a Salesforce.com Community.</p>
Message	<p>The text that you want to post. Must be a string of no more than 10,000 characters.</p> <p>To mention a user or group, enter <code>@[reference]</code>, where <i>reference</i> is the ID for the user or group that you want to mention. The reference can be a literal value, a merge field, or a flow resource. For example: <code>@[!UserId]</code>.</p> <p>To add a topic, enter <code>#[string]</code>, where <i>string</i> is the topic that you want to add. For example: <code>#[Action Required]</code>.</p>
Target Name or ID	<p>Reference to the user, Chatter group, or record whose feed you want to post to.</p> <ul style="list-style-type: none"> To post to a user's feed, enter the user's ID or Username. For example: <code>jsmith@salesforce.com</code> To post to a Chatter group, enter the group's Name or ID. For example: <code>Entire Organization</code> To post to a record, enter the record's ID. For example: <code>001D000000JWBDx</code>
Target Type	<p>Required only if Target Name or ID is set to a username or a Chatter group name.</p> <p>The type of feed that you want to post to. Valid values are:</p> <ul style="list-style-type: none"> <i>User</i>—If Target Name or ID is set to a user's Username, enter this value. <i>Group</i>—If Target Name or ID is set to a Chatter group's Name, enter this value.
Visibility	<p>Specifies whether this feed item is available to all users or internal users only.</p> <p>Valid only if Salesforce Communities is enabled. Valid values are:</p> <ul style="list-style-type: none"> <i>allUsers</i> <i>internalUsers</i>

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Outputs

Output Parameter Description

Output Parameter	Description
Feed Item ID	Assigns the created post's ID to a resource in the flow.

Usage

 **Note:** At run time, the Chatter post isn't created until the interview's transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

SEE ALSO:

[Flow Elements](#)

[Customize What Happens When a Flow Fails](#)

[Define the Path That a Flow Takes](#)

[Cross-Object Field References in Flows](#)

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.

IN THIS SECTION:

[Flow Screen Element: General Info](#)

Identifies which navigation buttons are available for a given screen, as well as whether help text is available to the flow user.

[Flow Screen Element: User Input Fields](#)

Lets users manually enter information. A *flow user input field* is a text box, long text area, number, currency, date, date/time, password, or checkbox in a Screen element.

[Flow Screen Element: Choice Fields](#)

Lets users select from a set of choices. A *flow choice field* is a radio button, drop-down list, multi-select checkbox, or multi-select picklist in a Screen element.

[Flow Screen Element: Display Text Fields](#)

Displays information to users while they're running the flow.

SEE ALSO:

[Flow Elements](#)

[Define the Path That a Flow Takes](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Flow Screen Element: General Info

Identifies which navigation buttons are available for a given screen, as well as whether help text is available to the flow user.

Navigation Options

Field	Description
Drop-down list	<p>Determines which navigation buttons display for this screen. At run time, the system automatically determines which buttons are relevant, depending on whether any screens precede or follow the screen in the flow path. To restrict the screen from displaying either the Previous or the Finish button, use the drop-down list.</p> <ul style="list-style-type: none"> • No navigation restrictions—(Default) The system displays all relevant navigation buttons on the screen. • Don't show Previous button—Select this option if revisiting the previous screen triggers an action that must not be repeated, such as a credit card transaction. • Don't show Finish button—Select this option if you need the user to go back to a previous screen to continue or complete the flow. <p>For example, suppose the flow prompts the user to enter information to identify an existing contact. The flow then looks up the user-entered information in the database. If no matching contact is found, the flow displays a screen to tell the user to go back and try again. For that screen, select Don't show Finish button.</p>
Show Pause button	<p>Adds the Pause button to the navigation buttons for this screen, if <code>Let Users Pause Flows</code> is enabled in your organization's Workflow and Approvals settings. Once a user pauses a flow interview, only that user or an administrator can resume the interview.</p>
Paused Message	<p>The message that's displayed to flow users when they pause a flow.</p>

Help Text

Field	Description
Text box	<p>Information for users to see when they click Help for this form.</p>

Usage

If you allow users to pause interviews of this flow:

- Customize the [interview label](#)
- Enable `Let Users Pause Flows` in your organization's Process Automation Settings

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

- Add the Paused Flow Interviews component to the Home page layout for relevant users

SEE ALSO:

[Flow Screen Element](#)

Flow Screen Element: User Input Fields

Lets users manually enter information. A *flow user input field* is a text box, long text area, number, currency, date, date/time, password, or checkbox in a Screen element.

Field	Description
Label	User-friendly text that displays to the left of the field. To format the label, click it .
Unique Name	A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Input Type	Automatically populated based on the type of input field you selected.
Default Value	Pre-populated value for the input field. The data type of the default value must be compatible with the field's data type. For example, a checkbox's default value must be of type boolean.
Scale	Controls the number of digits to the right of the decimal point. Can't exceed 17. If you leave this field blank or set to zero, only whole numbers display when your flow runs. Available for only Currency and Number input fields.
Required	Forces users to enter a value before they can move on to the next screen.
Validate	Enables input validation on this field.
Formula Expression	Boolean formula expression that evaluates whether the user entered an acceptable value.
Error Message	Displays underneath the field if the user didn't enter an acceptable value.
Help Text	Adds i next to the input field. In the text box, enter helpful information about this field.

SEE ALSO:

[Flow Screen Element](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Flow Screen Element: Choice Fields

Lets users select from a set of choices. A *flow choice field* is a radio button, drop-down list, multi-select checkbox, or multi-select picklist in a Screen element.

Field	Description
Label	Displays to the left of the field. To format the label, click  .
Unique Name	A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Value Data Type	Controls which choices are available in Choice Settings. For example, if you choose Number you can't use a choice that has a data type of Text. You can't change the value data type of multi-select choice fields; only text is supported.
Scale	Controls the number of digits to the right of the decimal point. Can't exceed 17. If you leave this field blank or set to zero, only whole numbers display when your flow runs. Available for only Currency and Number choice fields.
Required	Forces users to identify a choice before they progress to the next screen.
Default Value	The choice that's preselected for the user.
Choice	The choice options that the user can choose from. Select configured choices, dynamic record choices, or picklist choices.  Note: You can't rearrange choices.
Help Text box	Information that users see when they click  .

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

SEE ALSO:

- [Limitations for Multi-Select Choice Fields](#)
- [Options for Choice Fields in Flow Screen Elements](#)
- [Flow Screen Element](#)

Options for Choice Fields in Flow Screen Elements

A key part of configuring choice fields in a flow screen is selecting the choice options to display in that field. These options appear as the individual radio buttons or checkboxes or options in a drop-down list. Create choice options with at least one of these resources: choices, dynamic record choices, or picklist choices.

Dynamic record choices and picklist choices are easier to configure and don't require as much maintenance as choices. We recommend using a flow choice resource (otherwise known as stand-alone choices) only when you can't use the other two.

If you want the user to select...	Use this resource
From a set of filtered records	Dynamic Record Choice
From a set of values that correspond to an existing picklist or multi-select picklist field	Picklist Choice
Something that can't be generated from a record, picklist field, or multi-select picklist field	Choice

SEE ALSO:

- [Flow Screen Element: Choice Fields](#)
- [Flow Dynamic Record Choice Resource](#)
- [Flow Picklist Choice Resource](#)
- [Flow Choice Resource](#)

Flow Screen Element: Display Text Fields

Displays information to users while they're running the flow.

Field	Description
Unique Name	A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Text box	The text to display to the flow user. Click  to switch between the plain text editor and the rich text editor. Using the rich text editor saves the content as HTML.

 **Example:** Welcome users to the flow or to display terms and conditions.

SEE ALSO:

- [Flow Screen Element](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Flow Send Email Element

Sends an email by manually specifying the subject, body, and recipients in the flow.



Tip:

- Store the text for the email body in a text template.
- To use an email template that exists in your organization, call an [email alert](#) instead.

Specify at least one recipient for the email. You can use both email address parameters, so long as the combined number of addresses is five or fewer.

Field	Description
Body	Text for the body of the email. Consider using a text template resource.
Subject	Text for the subject of the email.
Email Addresses (comma-separated)	<p>Optional. Recipients of the email. This parameter accepts string values, which include variables of type Text, manually entered strings, and input fields from a Screen element.</p> <p>For the email to send successfully, enter a value for <code>Email Addresses (comma-separated)</code> or <code>Email Addresses (collection)</code>. You can use both parameters, so long as the combined number of email addresses is five or fewer.</p>
Email Addresses (collection)	<p>Optional. Recipients of the email. This parameter accepts only collection variables of type Text.</p> <p>For the email to send successfully, enter a value for <code>Email Addresses (comma-separated)</code> or <code>Email Addresses (collection)</code>. You can use both parameters, so long as the combined number of email addresses is five or fewer.</p>
Sender Address	The organization-wide email address that's used to send the email. Required only if <code>Sender Type</code> is set to <code>OrgWideEmailAddress</code> .
Sender Type	<p>Optional. Email address used as the email's From and Reply-To addresses. Valid values are:</p> <ul style="list-style-type: none"> • <code>CurrentUser</code>—Email address of the user running the flow. (Default) • <code>DefaultWorkflowUser</code>—Email address of the default workflow user. • <code>OrgWideEmailAddress</code>—The organization-wide email address that is specified in <code>Sender Address</code>.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Usage

-  **Note:** At run time, the email isn't sent until the interview's transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

SEE ALSO:

- [Send Email from a Flow](#)
- [Flow Text Template Resource](#)
- [Customize What Happens When a Flow Fails](#)
- [Define the Path That a Flow Takes](#)
- [Cross-Object Field References in Flows](#)

Flow Step Element

Acts as a placeholder when you're not sure which element you need.

Usage

Steps aren't valid elements for active flows. As a flow admin, you can run a draft flow with Step elements in it. Before you activate the flow, replace the Step elements with other elements or delete them entirely.

Convert a Step element into a Screen element at any time by hovering your mouse over the step and clicking .

-  **Note:**
- If you convert a step that has multiple connectors into a Screen, all its connectors are deleted.
 - Once a Step element has been converted, you can't use its original unique name.

SEE ALSO:

- [Flow Screen Element](#)
- [Flow Elements](#)
- [Define the Path That a Flow Takes](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Flow Submit for Approval Element

Submits one Salesforce record for approval.



Tip: Before you begin, store the ID for the record that you want to submit for approval.

Inputs

Transfer data from the flow to the approval submission.

Input Parameter	Description
Record ID	The ID of the record that you want to submit for approval.
Next Approver IDs	The ID of the user to be assigned the approval request when the approval process doesn't automatically assign the approver. Must be a collection variable of type String that includes exactly one item.
Approval Process Name or ID	<p>The unique name or ID of the specific approval process to which you want the record to be submitted. The process must have the same object type as the record you specified in <code>Record ID</code>.</p> <p>This parameter is required if <code>Skip Entry Criteria</code> is set to <code>\$GlobalConstant.True</code>.</p> <p>If this parameter and <code>Submitter ID</code> aren't set, the flow succeeds only when:</p> <ul style="list-style-type: none"> The approver on submit is determined automatically, and The user who launched the flow is an allowed initial submitter <p>Make sure that:</p> <ul style="list-style-type: none"> The approver on submit is determined automatically, and The initial submitters (for the approval processes related to this object) include all users who could launch this flow <p>For details, see Create an Approval Process.</p>
Skip Entry Criteria	If set to <code>\$GlobalConstant.True</code> , the record isn't evaluated against the entry criteria set on the process that is defined in <code>Approval Process Name or ID</code> .
Submission Comments	<p>Text that you want to accompany the submission.</p> <p>Submission comments appear in the approval history for the specified record. This text also appears in the initial approval request email if the template uses the <code>{!ApprovalRequest.Comments}</code> merge field.</p>
Submitter ID	<p>The ID for the user who submitted the record for approval. The user receives notifications about responses to the approval request.</p> <p>The user must be one of the allowed submitters for the process.</p> <p>If you don't set this field, the user who launched the flow is the submitter. If a workflow rule triggers a flow that includes this element, the submitter is the user who triggered the workflow rule. Workflow rules can be</p>

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Input Parameter	Description
	triggered when a user creates or edits a record. When the record is approved or rejected, the user who launched the flow or triggered the workflow rule is notified.

Outputs

Transfer data from the approval request to the flow. Assignments occur when the approval request is created.

Optional Output Parameter	Description
Instance ID	The ID of the approval request that was submitted.
Instance Status	The status of the current approval request. Valid values are "Approved," "Rejected," "Removed," or "Pending".
New Work Item IDs	The IDs of the new items submitted to the approval request. There can be 0 or 1 approval processes.
Next Approver IDs	The IDs of the users who are assigned as the next approvers.
Record ID	The ID of the record that the flow submitted for approval.

Usage

 **Note:** At run time, the approval request isn't created until the interview's transaction completes. Transactions complete either when the interview finishes, executes a Screen element, or executes a Wait element.

SEE ALSO:

- [Flow Elements](#)
- [Customize What Happens When a Flow Fails](#)
- [Define the Path That a Flow Takes](#)
- [Cross-Object Field References in Flows](#)

Flow Subflow Element

Calls another flow in your organization. Use this element to reference modular flows and simplify the overall architecture of your flow.

A subflow element references another flow and calls that flow at run time. When a flow contains a subflow element, we call it the *master flow* to distinguish it from the *referenced flow*.

 **Tip:** Create smaller flows that perform common tasks. For example, build utility flows to capture address and credit card information, and authorize a credit card purchase amount. Then call those flows as needed from multiple product-ordering flows.

Assign values to variables in the referenced flow. Variable assignments occur when the master flow calls the referenced flow at run time.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Column Header	Description
Target	<p>Referenced flow's variable whose value you want to set.</p> <p>By default, this drop-down list contains the variables of the currently active version of the referenced flow. If the referenced flow has no active version, the drop-down list contains the variables of the <i>latest</i> version of the referenced flow.</p>
Source	<p>Master flow's resource or value to assign to the target.</p> <p>Options:</p> <ul style="list-style-type: none"> • Select an existing flow resource, such as a variable, constant, or user input. • Select CREATE NEW to create a flow resource. • Manually enter a literal value or merge field.

Assign values from the referenced flow's variables to the master flow's variables. Variable assignments occur when the referenced flow finishes running.

Column Header	Description
Source	<p>Referenced flow's variable whose value you want to assign to the target.</p> <p>By default, this drop-down list contains the variables of the currently active version of the referenced flow. If the referenced flow has no active version, the drop-down list contains the variables of the <i>latest</i> version of the referenced flow.</p>
Target	<p>Master flow's variable whose value you want to set.</p>

Usage

At run time, the master flow calls the *active* version of each referenced flow by default. If a referenced flow has no active version, then the master flow calls the *latest* version of the referenced flow. To run only the latest version of each referenced flow:

- Open the master flow, and click **Run with Latest** in the button bar, or
- Append the URL for the master flow with `?latestSub=true`

 **Note:** Only flow admins can run inactive flows. For other users, the flow fails at run time if a subflow element tries to call a flow with no active version.

SEE ALSO:

[Flow Elements](#)

[View Inputs and Outputs of Other Referenced Flow Versions](#)

[Customize What Happens When a Flow Fails](#)

[Define the Path That a Flow Takes](#)

[Cross-Object Field References in Flows](#)

Flow Wait Element

Waits for one or more defined events to occur, which lets you automate processes that require a waiting period.

Define the events that the flow waits for before it proceeds.

Field	Description
Name	The name appears on the connector that's associated with this event.
Unique Name	The requirement for uniqueness applies only to elements within the current flow. Two elements can have the same unique name, provided they are used in different flows. A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Event Type	Determines whether the flow is waiting for: <ul style="list-style-type: none"> • An absolute time (such as 3 days from now), or • A time relative to a date/time field on a Salesforce record (such as 3 days after an opportunity closes)
Event Conditions	Determines the exact event that the flow is waiting for. Parameters vary, based on the selected event type.
Wait for this event only if additional conditions are met	If selected, the flow waits for this event only when certain conditions are met.
Waiting Conditions	Determines which conditions must be true for the flow to wait for this event. Available only if <code>wait for this event only if additional conditions are met</code> is selected. The flow waits for the event only if the waiting conditions evaluate to <code>true</code> . For details, see Define Flow Conditions on page 32.
Variable Assignments	Assigns the event's outputs to flow variables. Parameters vary, based on the selected event type.
[Default Path]	Determines what the flow does when all the events have unmet waiting conditions. If at least one event doesn't have waiting conditions, the default path is never executed. The name displays on the Wait element's default connector. Provide a custom name for this path by replacing the predefined value.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

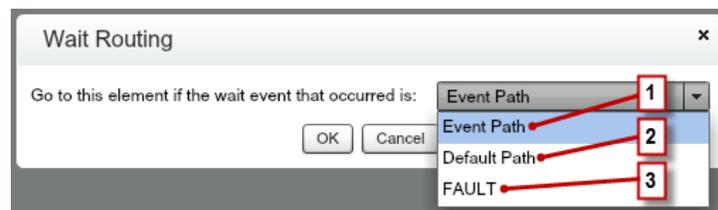
Usage

Note:

- Flows that contain Wait elements must be autolaunched. If a flow includes Wait elements and screens, choice, or dynamic choices, you can't activate or run it.
- Before you add a Wait element to your flow, understand the special behavior and limitations. See [Limitations for Time-Based Flows](#) on page 18 for details.

After you define your events, connect the Wait element to other elements on the canvas to indicate what the flow does when:

- Each event is the first to occur. One connector (**1**) is available for each event that's defined in the Wait element.
- There are no more events to wait for, because the waiting conditions for every event are unmet. One connector (**2**) is available for the Wait element's default path.
- An error occurs related to the Wait element. One connector (**3**) is available for the Wait element's fault path, and it's always labeled FAULT.



If the flow waits for multiple events, consider returning the flow path to the Wait element again so that the flow waits for the other events. If you return the flow path to the Wait element, consider using waiting conditions to control when the flow waits for each event. For an example, see [Sample Flow That Waits for Many Events](#) on page 120.

IN THIS SECTION:

[What Are Waiting Conditions?](#)

Each event that you define in a flow Wait element has optional *waiting conditions*. These conditions must be met for the flow interview to wait for that event at run time.

SEE ALSO:

[Customize What Happens When a Flow Fails](#)

[Define the Path That a Flow Takes](#)

[Cross-Object Field References in Flows](#)

[Flow Elements](#)

What Are Waiting Conditions?

Each event that you define in a flow Wait element has optional *waiting conditions*. These conditions must be met for the flow interview to wait for that event at run time.

When an interview encounters a Wait element, it checks the waiting conditions for each event to determine which events to wait for. If the waiting conditions aren't met for an event, the interview doesn't wait for that event. If all events have unmet waiting conditions, the interview executes the default path.



Tip: Add a default path if:

- All the events have waiting conditions set, and
- You want the flow to proceed when the waiting conditions for all events are met



Example: Here are two scenarios in which you would use waiting conditions.

- The flow waits for different events based on a field value on a given record.

For example, send an email reminder to a contract's owner before the contract's end date. The date on which you send the email depends, however, on the rating of the contract's account. If the account is hot, send the email a month before the end date. If the account isn't hot, send the email two weeks before the end date.

In this example, you would create two events. The event for hot accounts occurs 30 days before the contract's end date. Its waiting conditions would check if the `Rating` for the contract's account is equal to "Hot."

Waiting Conditions

Wait for this event only if additional conditions are met
 If these conditions aren't met when the interview hits this Wait element, the interview doesn't wait for this event. Instead, it waits for the other defined events. If the conditions aren't met for all of the defined events, the interview takes the Wait element's default path.

Resource	Operator	Value
<input type="text" value="{!account.Rating}"/>	<input type="text" value="equals"/>	<input type="text" value="Hot"/>

The second event occurs 15 days before the contract's end date. Its waiting conditions would check if the `Rating` for the contract's account is not equal to "Hot."

When a flow interview executes the Wait element during run time, the interview checks the waiting conditions for each event. It only waits for the events whose waiting conditions are met. If the account is hot, the interview doesn't wait for the second event.

- The flow waits for multiple events to occur, such as to send periodic email reminders. For an example of this scenario, see [Sample Flow That Waits for Many Events](#) on page 120.

SEE ALSO:

[Operators in Flow Record Filters](#)

[Flow Wait Element](#)

[Flow Event Types](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Flow Resources

Each *resource* represents a value that you can reference throughout the flow.

In the Cloud Flow Designer, the Explorer tab displays the resources that are available in the flow.

You can create some types of resources from the Resources tab by double-clicking them. Some resources, such as global constants and system variables, are automatically provided by the system. Other resources are provided by the system when you add an element to the flow. For example, when you add a Decision element to your flow, the system creates a resource for each outcome.

Which resources are available depend on the specific field you're setting. Oftentimes you can create resources from within that field by expanding the CREATE NEW section of its drop-down list.

Flow Resource	Description	Creatable from the Resources Tab
Choice	Represents an individual value that can be used in choice screen fields.	Yes
Collection Variable	Stores multiple updatable values that have the same data type, such as a group of email addresses.	Yes
Constant	Stores a fixed value.	Yes
Dynamic Record Choice	Represents a set of choices that's generated from an object's records.	Yes
Element	<p>Any element that you add to the flow is available as a Resource with the <code>was visited</code> operator in outcome criteria. An element is considered visited if the element has already been executed in the flow interview.</p> <p>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 <code>True</code>. If the element wasn't executed or was executed and resulted in an error, the resource's value is <code>False</code>.</p>	
Formula	Calculates a value by using other resources in your flow and Salesforce functions	Yes
Global Constant	Fixed, system-provided values, such as <code>EmptyString</code> , <code>True</code> , and <code>False</code> , 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 Visual Workflow, global variables are available in only flow formulas.	
Outcome	If you add a Decision element to the flow, its outcomes are available as Boolean resources. If an outcome path has already	

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Flow Resource	Description	Creatable from the Resources Tab
	been executed in the flow interview, the resource's value is <code>True</code> .	
Picklist Choice	Represents a set of choices that's generated from the values of a picklist or multi-select picklist field.	Yes
Picklist Values	System-provided values for picklist fields in <code>sObject</code> variables and <code>sObject</code> 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.	
SObject Collection Variable	Stores updatable field values for one or more Salesforce records.	Yes
SObject Variable	Stores updatable field values for a Salesforce record.	Yes
System Variable	System-provided values about the running flow interview, such as <code> {!\$Flow.CurrentDate}</code> , <code> {!\$Flow.CurrentDateTime}</code> , and <code> {!\$Flow.FaultMessage}</code> .	
Text Template	Stores formatted text.	Yes
Variable	Stores a value that can be updated as the flow executes.	Yes
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 <code>True</code> . If the event has no waiting conditions set, the resource's value is always <code>True</code> .	

SEE ALSO:

[Cloud Flow Designer](#)

Flow Choice Resource

Represents an individual value that can be used in choice screen fields.

Field	Description
<code>Label</code>	A user-friendly label for the choice option.
<code>Unique Name</code>	A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
<code>Description</code>	Helps you differentiate this choice option from other resources.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Field	Description
Value Data Type	Controls which choice fields this choice can be used in. For example, you can't use a Text choice in a Currency radio button field.
Scale	Controls the number of digits to the right of the decimal point. Can't exceed 17. If you leave this field blank or set to zero, only whole numbers display when your flow runs. Available for only Currency and Number choices.
Stored Value	If the user selects this choice, the choice field has this value. If a user leaves a choice blank or unselected, its stored value is set to <code>null</code> .
Show Input on Selection	Displays a text box below the choice option. This option isn't available if the choice's data type is <code>Boolean</code> .

These fields appear only if you select `Show Input on Selection`.

Field	Description
Label	A user-friendly label for the text box.
Required	Forces users to enter a value in the text box before they can progress or finish the flow.
Validate	Evaluates whether the user entered an acceptable value.

These fields appear only if you select `Validate`.

Field	Description
Formula	Boolean formula expression that evaluates whether the user entered an acceptable value.
Error Message	Displays if the user didn't enter an acceptable value.

 **Example:** If your flow asks users to choose a particular service level, create choices for Gold, Silver, and Bronze. In a screen, display the choices with a description of the features included. Then, in the same screen, let the user pick from a dropdown list.

SEE ALSO:

[Flow Resources](#)

[Flow Screen Element: Choice Fields](#)

[Options for Choice Fields in Flow Screen Elements](#)

[Cross-Object Field References in Flows](#)

Flow Collection Variable Resource

Stores multiple updatable values that have the same data type, such as a group of email addresses.

Field	Description
Unique Name	The requirement for uniqueness applies only to elements within the current flow. Two elements can have the same unique name, provided they are used in different flows. A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Description	Helps you differentiate this collection variable from other resources.
Data Type	Determines the type of values that can be assigned to the collection variable.
Input/Output Type	<p>Determines whether the collection variable can be accessed outside the flow.</p> <ul style="list-style-type: none"> • Private—Can be assigned and used only within the flow • Input—Can be set at the start of the flow using Visualforce controllers, or subflow inputs • Output—Can be accessed from Visualforce controllers and other flows <p>This field doesn't affect how variables are assigned or used within the same flow, for example, through these types of elements: Assignment, Record or Fast Create, Record or Fast Lookup, and Apex Plug-in.</p> <p>The default value of the field is <code>Private</code>.</p> <p> Warning: Disabling input or output access for an existing variable can break the functionality of applications and pages that call the flow and access the variable. For example, you can access variables from URL parameters, Visualforce controllers, subflows, and processes.</p>

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

SEE ALSO:

[Flow Resources](#)

[Flow sObject Collection Variable Resource](#)

[Flow Loop Element](#)

[Cross-Object Field References in Flows](#)

Flow Constant Resource

A flow constant represents a fixed value. Unlike variables, this value can't change throughout a flow.

Field	Description
Unique Name	The requirement for uniqueness applies only to elements within the current flow. Two elements can have the same unique name, provided they are used in different flows. A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Description	Helps you differentiate this constant from other resources.
Data Type	Determines the types of values that the constant can store.
Value	The constant's value. This value doesn't change throughout the flow.

SEE ALSO:

[Flow Resources](#)

Flow Dynamic Record Choice Resource

Represents a set of choices that's generated from an object's records.

Field	Description
Unique Name	The requirement for uniqueness applies only to elements within the current flow. Two elements can have the same unique name, provided they are used in different flows. A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Description	Helps you differentiate this resource from other resources.
Value Data Type	Data type of the choice's stored value.
Create a choice for each	Determines the object whose records you want to use to generate the choices
Filter Criteria	Determines which records are included in the generated list of choices. If you don't apply any filters, a choice is generated for <i>every</i> record of the selected object. For example, to generate a list of all accounts in San Francisco, use filters to include only accounts whose Billing City is San Francisco.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

EDITIONS

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- Unlimited
- Developer

Field	Description
Choice Label	<p>Determines which field is used as the label for each generated choice. Select a field that enables users to differentiate between the generated choices.</p> <p> Tip: Make sure to choose a field that contains data. If the selected field has no value for a given record, the corresponding choice's label is blank at run time.</p>
Choice Stored Value	<p>Determines which field's value is stored when the user selects this choice at run time. <code>Value Data Type</code> determines the available options.</p> <p>By default, the stored value is null. The stored value is determined by the most recent user selection of a choice within the generated set.</p>
Sort results by	<p>Controls the order that the choices appear in.</p> <p>When <code>Sort results by</code> is selected, also select the field that you want to order the choices by. Then select which order the choices should appear in.</p>
Limit number of choices to	<p>Controls the number of options that appear in the screen field that uses this dynamic record choice.</p> <p>When <code>Limit number of choices to</code> is selected, also enter the maximum number (up to 200) of choices to include.</p>
Assign the record fields to variables...	<p>Takes field values from the record that the user chose and stores them in flow variables that you can reference later.</p> <p> Note: When a multi-select choice field uses a dynamic record choice, only values from the last record that the user selects are stored in the flow variables. If multiple multi-select choice fields on one screen use the same dynamic record choice, the variable assignments obey the first of those fields.</p>

 **Example:** In a support flow for a computer hardware manufacturer, users identify a product to find its latest updates. You create a dynamic record choice that displays all products whose product ID starts with a specific string of characters. However, the flow users are more likely to know the product's name than its ID, so for `Choice Label` select the field that contains the product name. Elsewhere in the flow, you want to display the associated product ID and description. To do so, you assign the ID and Description field values from the user-selected record to flow variables.

SEE ALSO:

[Operators in Flow Record Filters](#)

[Flow Screen Element: Choice Fields](#)

[Options for Choice Fields in Flow Screen Elements](#)

[Flow Resources](#)

Flow Formula Resource

Calculates a value by using other resources in your flow and Salesforce functions.

Field	Description
Unique Name	The requirement for uniqueness applies only to elements within the current flow. Two elements can have the same unique name, provided they are used in different flows. A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Description	Helps you differentiate this formula from other resources.
Value Data Type	The data type for the value calculated by the formula.
Scale	Controls the number of digits to the right of the decimal point. Can't exceed 17. If you leave this field blank or set to zero, only whole numbers display when your flow runs. Appears when Value Data Type is Number or Currency.
Formula	The formula expression that the flow evaluates at run time. The returned value must be compatible with Value Data Type.  Note: Some formula operators are not supported in the Cloud Flow Designer.

SEE ALSO:

[Limitations for Flow Formulas](#)

[Flow Resources](#)

[Cross-Object Field References in Flows](#)

Flow Global Constant Resource

Fixed, system-provided values, such as `EmptyString`, `True`, and `False`.

Global Constant	Supported Data Types
<code>{!\$GlobalConstant.True}</code>	Boolean
<code>{!\$GlobalConstant.False}</code>	Boolean
<code>{!\$GlobalConstant.EmptyString}</code>	Text

 **Example:** When you create a Boolean variable, `$GlobalConstant.True` and `$GlobalConstant.False` are supported. But when you create a Currency variable, no global constants are supported.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

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- Developer

Null vs. Empty String

At run time, `{!$GlobalConstant.EmptyString}` and `null` are treated as separate, distinct values. For example:

- If you leave a text field or resource value blank, that value is `null` at run time. If you instead want the value to be treated as an empty string, set it to `{!$GlobalConstant.EmptyString}`.
- For flow conditions, use the `is null` operator to check whether a value is `null`. If the condition compares two text variables, make sure that their default values are correctly either set to `{!$GlobalConstant.EmptyString}` or left blank (`null`).

SEE ALSO:

[Flow Resources](#)

Global Variables in Visual Workflow

System-provided variables that reference information about the organization or running user, such as the user's ID or the API session ID. In Visual Workflow, global variables are available in only flow formulas.

 **Example:** Use `{!$User.Id}` to easily access the ID of the user who's running the flow interview.

The following global variables are supported in flow formulas. If a value in the database has no value, the corresponding merge field returns a blank value. For example, if nobody has set a value for your organization's Country field, `{!$Organization.Country}` returns no value.

Global Variable	Description
<code>\$Api</code>	References API URLs or the session ID. The following merge fields are available. <ul style="list-style-type: none"> • <code>Enterprise_Server_URL_xxx</code>—The Enterprise WSDL SOAP endpoint where <code>xxx</code> represents the version of the API. • <code>Partner_Server_URL_xxx</code>—The Partner WSDL SOAP endpoint where <code>xxx</code> represents the version of the API. • <code>Session_ID</code>
<code>\$Label</code>	References custom labels. This global variable appears only if custom labels have been created in your organization. The returned value depends on the language setting of the contextual user. The value returned is one of the following, in order of precedence: <ol style="list-style-type: none"> 1. The local translation's text 2. The packaged translation's text 3. The master label's text
<code>\$Organization</code>	References information about your company. <p> Note: <code>{!\$Organization.UiSkin}</code> returns one of these values.</p> <ul style="list-style-type: none"> • <code>Theme1</code>—Obsolete Salesforce theme • <code>Theme2</code>—Salesforce theme used before Spring '10

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Global Variable	Description
	<ul style="list-style-type: none"> • <code>Theme3</code>—Classic “Aloha” Salesforce theme, introduced in Spring ’10 • <code>PortalDefault</code>—Salesforce Customer Portal theme • <code>Webstore</code>—Salesforce AppExchange theme
<code>\$Permission</code>	References information about the running user’s current access to any of your organization’s custom permissions. This global variable appears only if custom permissions have been created in your organization.
<code>\$Profile</code>	<p>References information from the current user’s profile, such as license type or name.</p> <p> Tip:</p> <ul style="list-style-type: none"> • Use profile names to reference standard profiles in <code>\$Profile</code> merge fields. • Users don’t need access to their profile information to run a flow that references these merge fields.
<code>\$Setup</code>	<p>References custom settings of type “hierarchy”. This global variable appears only if hierarchy custom settings have been created in your organization. You can access custom settings of type “list” only in Apex.</p> <p>Hierarchical custom settings allow values at any of three different levels:</p> <ul style="list-style-type: none"> • Organization—the default value for everyone • Profile—overrides the Organization value • User—overrides both Organization and Profile values <p>Salesforce automatically determines the correct value for this custom setting field based on the running user’s current context.</p>
<code>\$System</code>	<code>\$System.OriginDateTime</code> represents the literal value of 1900-01-01 00:00:00. Use this merge field to perform date/time offset calculations.
<code>\$User</code>	<p>References information about the user who’s running the flow interview. For example, reference the user’s ID or title.</p> <p> Tip:</p> <ul style="list-style-type: none"> • The current user is the person who caused the flow to start. • When a flow is started because a Web-to-Case or Web-to-Lead process changed a record, the current user is the <code>Default Lead Owner</code> or <code>Default Case Owner</code>. <p><code>\$User.UITheme</code> and <code>\$User.UIThemeDisplayed</code> identify the look and feel the running user sees on a given Salesforce page. The difference between the two variables is that <code>\$User.UITheme</code> returns the look and feel the user is <i>supposed</i> to see, while <code>\$User.UIThemeDisplayed</code> returns the look and feel the user <i>actually</i> sees. For example, a user may have the permissions to see the new user interface theme look and feel, but if they are using a browser that doesn’t support that look and feel, for example, older versions of Internet Explorer, <code>\$User.UIThemeDisplayed</code> returns a different value. These merge fields return one of the following values.</p> <ul style="list-style-type: none"> • <code>Theme1</code>—Obsolete Salesforce theme • <code>Theme2</code>—Salesforce theme used before Spring ’10 • <code>Theme3</code>—Classic “Aloha” Salesforce theme, introduced in Spring ’10

Global Variable	Description
	<ul style="list-style-type: none"> • <code>PortalDefault</code>—Salesforce Customer Portal theme • <code>Webstore</code>—Salesforce AppExchange theme
<code>\$UserRole</code>	<p>References information about the current user's role, such as the role name or ID.</p> <p> Tip:</p> <ul style="list-style-type: none"> • The current user is the person who caused the flow to start. • When a flow is started because a Web-to-Case or Web-to-Lead process changed a record, the current user is the <code>Default Lead Owner</code> or <code>Default Case Owner</code>.

Flow Picklist Choice Resource

Represents a set of choices that's generated from the values of a picklist or multi-select picklist field.

Field	Description
<code>Unique Name</code>	The requirement for uniqueness applies only to elements within the current flow. Two elements can have the same unique name, provided they are used in different flows. A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
<code>Description</code>	Helps you differentiate this resource from other resources.
<code>Value Data Type</code>	Data type of the choice's stored value.
<code>Object</code>	The object whose fields you want to select from.
<code>Field</code>	The picklist or multi-select picklist field to use to generate the list of choices.
<code>Sort Order</code>	Controls the order that the choices appear in.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

 **Example:** In a flow that simplifies the process of creating an account, users need to identify the company's industry.

Rather than creating one choice for each industry, you add a picklist choice to the flow and populate a drop-down list with it. When users run this flow, the picklist choice finds all the values in the database for the Industry picklist field **(1)** on the Account object **(2)**.

Unique Name * picklist_AccountIndustry ?

[Add Description](#)

Value Data Type * Picklist

Object * Account 2

Field * Industry 1

Sort Order: Ascending

On top of being easier to configure than the stand-alone choice resource, picklist choices reduce maintenance. When someone adds new options to the Account Industry picklist, the flow automatically reflects those changes; you don't have to update the flow.

Usage

Unlike with dynamic record choices, you can't:

Filter out any values that come back from the database.

The flow always displays every picklist value for that field—even if you're using record types to narrow down the picklist choices in page layouts.

Customize the label for each option.

The flow always displays the label for each picklist value.

Customize the stored value for each option.

The flow always stores the API value for each picklist value.

The following picklists aren't supported.

- Global picklists
- Picklists for Knowledge Articles

SEE ALSO:

[Flow Screen Element: Choice Fields](#)

[Options for Choice Fields in Flow Screen Elements](#)

[Flow Resources](#)

Flow sObject Collection Variable Resource

Stores updatable field values for one or more Salesforce records.

Field	Description
Unique Name	The requirement for uniqueness applies only to elements within the current flow. Two elements can have the same unique name, provided they are used in different flows. A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Field	Description
Description	Helps you differentiate this sObject collection variable from other resources.
Input/Output Type	<p>Determines whether the sObject collection variable can be accessed outside the flow.</p> <ul style="list-style-type: none"> • Private—Can be assigned and used only within the flow • Input—Can be set at the start of the flow using Visualforce controllers, or subflow inputs • Output—Can be accessed from Visualforce controllers and other flows <p>The default value is <code>Private</code>.</p> <p> Warning: Disabling input or output access for an existing variable can break the functionality of applications and pages that call the flow and access the variable. For example, you can access variables from URL parameters, Visualforce controllers, subflows, and processes.</p>
Object Type	Type of Salesforce records that the sObject collection represents in the flow.

Usage

After you populate the sObject collection, reference it to create, update, or delete records in the Salesforce database.

Examine every item in the collection by using a Loop element. When an item is being examined in the loop, the item's field values are copied into an sObject variable that you specify as the *loop variable*. If you want the loop to modify a collection item, such as to update an item's field values:

1. Configure the elements within the loop to update the loop variable.
2. Add the variable's field values to a separate collection.

You can add new items to the end of the collection (Assignment element) or replace all items in the collection (Fast Lookup element). However, you can't update existing collection items. To get around this limitation, have the loop iteratively add the contents of the loop variable to another collection. When the loop finishes, you can update the Salesforce records with values from the new collection.

SEE ALSO:

- [Sample Flow That Loops Through a Collection](#)
- [Flow Loop Element](#)
- [Flow Resources](#)

Flow sObject Variable Resource

Stores updatable field values for a Salesforce record.

Field	Description
Unique Name	The requirement for uniqueness applies only to elements within the current flow. Two elements can have the same unique name, provided they are used in different flows. A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Field	Description
Description	Helps you differentiate this sObject variable from other resources.
Input/Output Type	<p>Determines whether the sObject variable can be accessed outside the flow.</p> <ul style="list-style-type: none"> • Private—Can be assigned and used only within the flow • Input—Can be set at the start of the flow using Visualforce controllers, or subflow inputs • Output—Can be accessed from Visualforce controllers and other flows <p>This field doesn't affect how variables are assigned or used within the same flow, for example, through these types of elements: Assignment, Record or Fast Create, Record or Fast Lookup, and Apex Plug-in.</p> <p>The default value of the field is <code>Private</code>.</p> <p> Warning: Disabling input or output access for an existing variable can break the functionality of applications and pages that call the flow and access the variable. For example, you can access variables from URL parameters, Visualforce controllers, subflows, and processes.</p>
Object Type	Type of Salesforce record that the sObject variable represents in the flow.

Usage

When an sObject variable is created, its default value is `null`. Before you reference an sObject variable's values, make sure that the sObject variable has a value by using the `is null` operator in a Decision element.

SEE ALSO:

[Flow Resources](#)

System Variables in Flows

System-provided values about the running flow interview, such as `{!$Flow.CurrentDate}`, `{!$Flow.CurrentDateTime}`, and `{!$Flow.FaultMessage}`.

System Variable	Supported Resource Types	Description
<code>{!\$Flow.CurrentDate}</code>	Text, Date, and DateTime	Date when the flow interview executes the element that references the system variable.
<code>{!\$Flow.CurrentDateTime}</code>	Text, Date, and DateTime	Date and time when the flow interview executes the element that references the system variable.
<code>{!\$Flow.FaultMessage}</code>	Text	System fault message that can help flow administrators troubleshoot run time issues.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

 **Example:** A flow is used only internally by call center personnel. For each flow element that interacts with the Salesforce database, a fault connector leads to a screen. A Display Text field on the screen displays the system fault message and instructs the flow user to provide that message to the IT department.

```
Sorry, but you can't read or update records at this time.
Please open a case with IT, and include the following error message:
{!$Flow.FaultMessage}
```

SEE ALSO:

[Customize What Happens When a Flow Fails](#)

[Flow Resources](#)

Flow Text Template Resource

Stores HTML-formatted text.

Field	Description
Unique Name	The requirement for uniqueness applies only to elements within the current flow. Two elements can have the same unique name, provided they are used in different flows. A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Description	Helps you differentiate this text template from other resources.
Text Template	The text for the template. Use HTML to format the text and merge fields to reference information from other resources.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

 **Example:** You're designing a flow that registers people for an event. You create a text template that includes a registrant's name, address, and other information. Then you use the template in an email confirmation that the flow sends when it finishes.

SEE ALSO:

[Flow Resources](#)

[Cross-Object Field References in Flows](#)

Flow Variable Resource

Stores a value that can be updated as the flow executes.

Field	Description
Unique Name	The requirement for uniqueness applies only to elements within the current flow. Two elements can have the same unique name, provided they are used in different flows. A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Description	Helps you differentiate this variable from other resources.
Data Type	Determines the types of values that can be assigned to the variable.
Scale	Controls the number of digits to the right of the decimal point. Can't exceed 17. If you leave this field blank or set to zero, only whole numbers display when your flow runs. Appears only when the <code>Data Type</code> is set to <code>Number</code> or <code>Currency</code> .
Input/Output Type	<p>Determines whether the variable can be accessed outside the flow.</p> <ul style="list-style-type: none"> • <code>Private</code>—Can be assigned and used only within the flow • <code>Input</code>—Can be set at the start of the flow using Visualforce controllers, or subflow inputs • <code>Output</code>—Can be accessed from Visualforce controllers and other flows <p>This field doesn't affect how variables are assigned or used within the same flow, for example, through these types of elements: Assignment, Record or Fast Create, Record or Fast Lookup, and Apex Plug-in.</p> <p>The default value of the field depends on the release or API version in which the variable is created:</p> <ul style="list-style-type: none"> • <code>Private</code> for a variable created in Summer '12 and later or in API version 25.0 and later. • <code>Input</code> and <code>Output</code> for a variable created in Spring '12 and earlier or in API version 24.0. <p> Warning: Disabling input or output access for an existing variable can break the functionality of applications and pages that call the flow and access the variable. For example, you can access variables from URL parameters, Visualforce controllers, subflows, and processes.</p>
Default Value	<p>Determines the variable value when the flow starts. If you leave this field blank, the value is <code>null</code>.</p> <p>Default values aren't available for Picklist and Picklist (Multi-Select) variables.</p>

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Usage

You can delete a variable at any time. Any variable assignments that use the deleted variable are set to `null`.

SEE ALSO:

[Flow Resources](#)

[Flow Assignment Element](#)

[Flow sObject Variable Resource](#)

[Cross-Object Field References in Flows](#)

Cross-Object Field References in Flows

When building a flow, you can reference fields for records that are related to the values that are stored in an sObject variable. To do so, manually enter the references.

Cross-object field values are valid wherever you can reference a flow resource or manually enter a value.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Implementation Tips

If a flow interview encounters a null value at any point in the cross-object expression, the element containing the reference fails. The reference runs successfully if the last field value in the expression is `null`. For example, store a contact in `{!sObjContact}` and try to reference `{!sObjContact}.Account.Name`. The flow fails if `AccountId` on the stored contact is `null` (because there isn't an account to look at), but it succeeds if `Name` on the related account is `null`.

If an element contains a cross-object reference that fails and the element doesn't have a fault path defined, the entire interview fails. To avoid this situation, you can:

- Make the fields that you want to reference in the expression required in Salesforce. For example, for the expression `{!sObjContact}.Account.Name`, you could require `AccountId` on contact page layouts. Then, using another flow, find any records with null values for that field and update them.
- Determine whether each field that's referenced in the expression has a value by using the `wasSet` operator in a Decision element.

Cross-object field references in flows don't count against your organization's limits for:

- Cross-object relationships per object
- DML operations per transaction

Syntax

To reference a field on a related record, use this syntax.

```
{!sObjectName.objectName1.objectName2.fieldName}
```

where:

- `sObjectName` is the unique name for the sObject variable that you want to start from.
- `objectName1` is the API name for an object that's related to `sObjectName`'s object type. The API names for all custom objects end in `__r`.
- (Optional) `objectName2` is the API name for an object that's related to `objectName1`.

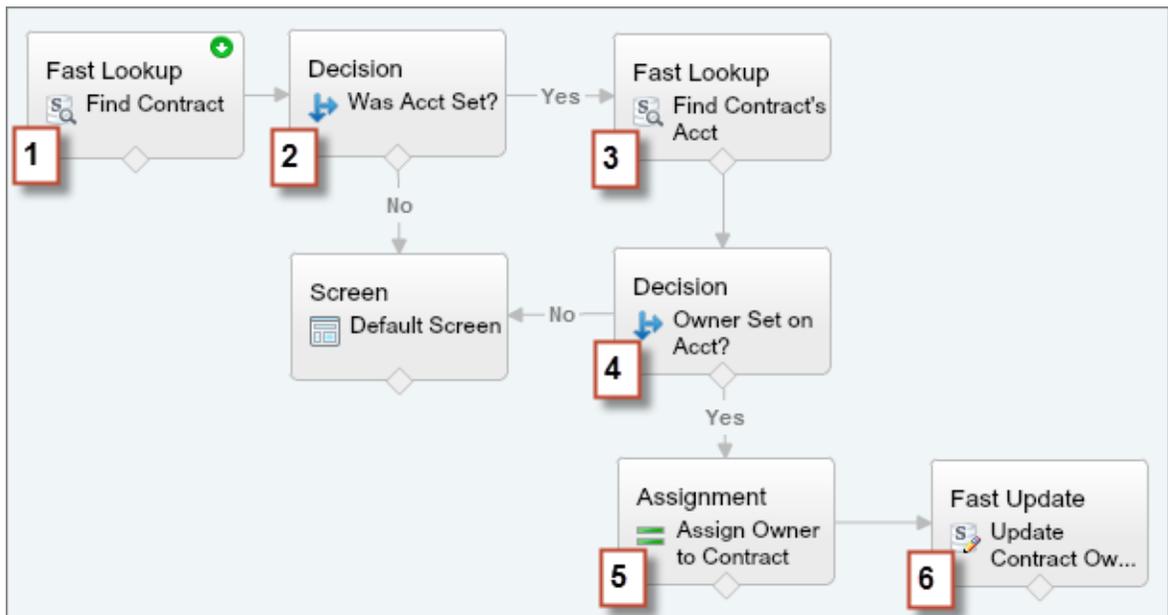
Your expression must include at least one object name, but you can add more objects as needed.

- *fieldName* is the name for the field that you want to reference on the last object in the expression. The API names for all custom fields end in `__c`.

For example, `{!sOv_Contact.Account.Id}` references Id of the account that's related to the contact record represented by an sObject variable in the flow.

When you create an sObject variable to reference fields on related records from, store the ID for the first related record in the variable. For example, to reference an opportunity's contract, store `ContractId` in the sObject variable or add a value for `ContractId` by using an Assignment element.

 **Example:** For example, to update a contract's owner to be the contract's account's owner:



1. Use a Fast Lookup element to store the contract's fields, including `AccountId`, in an sObject variable called `varContract`.
2. Use a Decision element to verify that the value of `AccountId` was set in `varContract`.
3. Use a Fast Lookup to store the fields for the contract's account, including `OwnerId`, in another sObject variable called `varAccount`.
4. Use a Decision element to confirm that the value of `OwnerId` was set in `varAccount`.
5. Use an Assignment element to specify `{!varContract.Account.OwnerId}` as the value for `{!varContract.OwnerId}`.
6. Use a Fast Update element to write the values in `varContract`, including the updated `OwnerId` value, to the contract in Salesforce.

Flow Connectors

Connectors determine the available paths that a flow can take at run time. In the Cloud Flow Designer canvas, a connector looks like an arrow that points from one element to another.

Label	Example	Description
<i>Unlabeled</i>		Identifies which element to execute next.
<i>Decision outcome name</i>		Identifies which element to execute when the criteria of a Decision outcome are met.
<i>Wait event name</i>		Identifies which element to execute when an event that's defined in a Wait element occurs.
FAULT		Identifies which element to execute when the previous element results in an error.
Next element		Identifies the first element to execute for each iteration of a Loop element.
End of loop		Identifies which element to execute after a Loop element finishes iterating through a collection.

SEE ALSO:

[Flow Elements](#)

Flow Operators

Operators behave differently, depending on what you're configuring. In Assignment elements, operators let you change resource values. In flow conditions and record filters, operators let you evaluate information and narrow the scope of a flow operation.

IN THIS SECTION:

[Operators in Flow Assignment Elements](#)

Use Assignment element operators to change the value of a selected resource.

[Operators in Flow Conditions](#)

Use condition operators to verify the value of a selected resource. Conditions are used in Decision elements and Wait elements.

[Operators in Flow Record Filters](#)

A flow record filter narrows the scope of records that the flow operates on. For example, use a record filter to update only the contacts that are associated with the Acme Wireless account. When you add a Record Update element, use the record filters to narrow the scope to just the contacts whose parent account is Acme Wireless.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Operators in Flow Assignment Elements

Use Assignment element operators to change the value of a selected resource.

Use this reference, organized by the data type that you select for Resource, to understand the supported operators.

- [Boolean](#)
- [Collection](#)
- [Currency](#)
- [Date](#)
- [Date/Time](#)
- [Multi-Select Picklist](#)
- [Number](#)
- [Picklist](#)
- [sObject](#)
- [Text](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Boolean

Replace a boolean resource with a new value.

Operator	Description	Supported Data Types	Example
equals	What you enter or select for Value replaces the value of Variable.	Boolean	Before Assignment: <code>{!varBoolean}</code> is false. Assignment: <code>{!varBoolean} equals {!\$GlobalConstant.True}</code> After Assignment: <code>{!varBoolean}</code> is true.

Collection

Replace the value of a collection variable or sObject collection variable (equals) or add an item to the end of the variable (add).

Operator	Description	Supported Data Types	Example
equals	What you enter or select for Value replaces the value of Variable.	Collection of the same data type or object type Text, Picklist, and Multi-Select Picklist data types are compatible with each other.	Before the Assignment: <ul style="list-style-type: none"> • <code>{!collText}</code> is Yellow, Green, Blue • <code>{!collPicklist}</code> is Blue, Red, Orange Assignment: <code>{!collText} equals {!collPicklist}</code> . After the Assignment: <code>{!collText}</code> is Blue, Red, Orange.

Operator	Description	Supported Data Types	Example
add	What you enter or select for Value is added as a new item at the end of the collection.	Variable of the same data type or sObject variable of the same object type Text, Picklist, and Multi-Select Picklist data types are compatible with each other.	Before the Assignment: <ul style="list-style-type: none"> • <code>{!collText}</code> is Yellow, Green, Blue • <code>{!varPicklist}</code> is Red Assignment: <code>{!collText} add {!varPicklist}</code> . After the Assignment: <code>{!collText}</code> is Yellow, Green, Blue, Red.

Currency and Number

Replace (equals), add to (add), or subtract from (subtract) the value of a currency or number resource.

Operator	Description	Supported Data Types	Example
equals	The number that you enter or select for Value replaces the value of Variable.	<ul style="list-style-type: none"> • Currency • Number 	Before the Assignment: <code>{!varCurrency}</code> is 10. Assignment: <code>{!varCurrency} equals 7</code> . After the Assignment: <code>{!varCurrency}</code> is 7.
add	The number that you enter or select for Value is added to the value of Variable.	<ul style="list-style-type: none"> • Currency • Number 	Before the Assignment: <code>{!varCurrency}</code> is 10. Assignment: <code>{!varCurrency} add 7</code> . After the Assignment: <code>{!varCurrency}</code> is 17.
subtract	The number that you enter or select for Value is subtracted from the value of Variable.	<ul style="list-style-type: none"> • Currency • Number 	Before the Assignment: <code>{!varCurrency}</code> is 10. Assignment: <code>{!varCurrency} subtract 7</code> . After the Assignment: <code>{!varCurrency}</code> is 3.

Date

Replace (equals), add to (add), or subtract from (subtract) the value of a date/time resource.

Operator	Description	Supported Data Types	Example
equals	The date that you enter or select for Value replaces the value of Variable.	<ul style="list-style-type: none"> • Date • Date/Time 	Before the Assignment: <code>{!varDate}</code> is 1/16/2016. Assignment: <code>{!varDate} equals 1/15/2016</code> . After the Assignment: <code>{!varDate}</code> is 1/15/2016.

Operator	Description	Supported Data Types	Example
add	Value is added, in days, to the selected Variable's value.	<ul style="list-style-type: none"> • Currency • Number 	Before the Assignment: <code>{!varDate}</code> is 1/16/2016. Assignment: <code>{!varDate} add 7</code> . After the Assignment: <code>{!varDate}</code> is 1/23/2016.
subtract	Value is subtracted, in days, from the selected Variable's value.	<ul style="list-style-type: none"> • Currency • Number 	Before the Assignment: <code>{!varDate}</code> is 1/16/2016. Assignment: <code>{!varDate} subtract 7</code> . After the Assignment: <code>{!varDate}</code> is 1/9/2016.

Date/Time

Replace a date/time resource with a new value (equals).

Operator	Description	Supported Data Types	Example
equals	The date that you enter or select for Value replaces the value of Variable.	<ul style="list-style-type: none"> • Date • Date/Time 	Before the Assignment: <code>{!varDateTime}</code> is 1/16/2016 01:00. Assignment: <code>{!varDateTime} equals 1/16/2016 08:00</code> . After the Assignment: <code>{!varDateTime}</code> is 1/16/2016 08:00.

Picklist

Replace a picklist resource with a new value (equals) or concatenate a value onto the original value (add).

 **Note:** Before values are assigned or added to a picklist resource, they're converted into string values.

Operator	Description	Supported Data Types	Example
equals	What you enter or select for Value replaces the value of the selected picklist.	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-Select Picklist • Number • Picklist • Text 	Before the Assignment: <code>{!varPicklist}</code> is Blue. Assignment: <code>{!varPicklist} equals Yellow</code> . After the Assignment: <code>{!varPicklist}</code> is Yellow.

Operator	Description	Supported Data Types	Example
add	What you enter or select for Value is added to the end of the selected picklist.	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-Select Picklist • Number • Picklist • Text 	<p>Before the Assignment: <code>{!varPicklist}</code> is Blue.</p> <p>Assignment: <code>{!varPicklist} add -green.</code></p> <p>After the Assignment: <code>{!varPicklist}</code> is Blue-green.</p>

Multi-Select Picklist

Replace a multi-select picklist resource with a new value (equals), concatenate a value onto the original value (add), or add a selection to the resource (add item).

 **Note:** Before values are assigned or added to a multi-select picklist resource, they're converted into string values.

Operator	Description	Supported Data Types	Example
equal	What you enter or select for Value replaces the value of the selected multi-select picklist.	<ul style="list-style-type: none"> • Boolean • Collection • Currency • Date • Date/Time • Multi-Select Picklist • Number • Picklist • Text 	<p>Before the Assignment: <code>{!varMSP}</code> is Blue.</p> <p>Assignment: <code>{!varMSP} equals Yellow.</code></p> <p>After the Assignment: <code>{!varMSP}</code> is Yellow.</p>
add	<p>What you enter or select for Value is added to the last item selected in the multi-select picklist. It doesn't create a selection.</p> <p>Easily add items to a multi-select picklist resource by using the "add item" operator.</p> <p>To add semi-colon-delimited items to a multi-select picklist variable with the "add" operator, always add</p>	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-Select Picklist • Number • Picklist • Text 	<p>Before the Assignment: <code>{!varMSP}</code> is Blue; Green. This value includes two separate selections.</p> <p>Assignment: <code>{!varMSP} add Yellow.</code></p> <p>After the Assignment: <code>{!varMSP}</code> is Blue; GreenYellow. This value includes two separate selections.</p>

Operator	Description	Supported Data Types	Example
	a single space after the semi-colon and don't include a space before the semi-colon. This way, you can compare the variable's values to the values of a multi-select picklist field from the Salesforce database. For example: <code>; Yellow</code>		
add item	What you enter or select for Value is added as a new selection to the end of the multi-select picklist. The Assignment automatically adds ";" before the new item. That way, Salesforce reads it as a separate item selected by the multi-select picklist.	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-Select Picklist • Number • Picklist • Text 	<p>Before the Assignment: <code>{!varMSP} is Blue; Green.</code></p> <p>Assignment: <code>{!varMSP} add item Yellow.</code></p> <p>After the Assignment: <code>{!varMSP} is Blue; Green; Yellow.</code> This value includes three separate selections.</p>

sObject

Replace an sObject variable with a new value (equals).

Operator	Description	Supported Data Types	Example
equals	The sObject that you select for Value replaces the value of Variable.	sObject with the same object type	<p>Before the Assignment:</p> <ul style="list-style-type: none"> • <code>{!account1}</code> contains field values for the Acme Wireless account • <code>{!account2}</code> contains field values for the Global Media account <p>Assignment: <code>{!account1} equals {!account2}.</code></p> <p>After the Assignment: both <code>{!account1}</code> and <code>{!account2}</code> contain the field values for the Global Media account.</p>

Text

Replace a text resource with a new value (equals) or concatenate a value onto the end of the original value (add).

 **Note:** Before values are assigned or added to a text resource, they're converted into string values.

Operator	Description	Supported Data Types	Example
equals	The text that you enter or select for Value replaces the value of Variable.	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Number • Multi-select picklist • Picklist • Text 	<p>Before the Assignment: {!varText} is Blue.</p> <p>Assignment: {!varText} equals Yellow.</p> <p>After the Assignment: {!varText} is Yellow.</p>
add	The text that you enter or select for Value is added to the end of Variable.	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Number • Multi-select picklist • Picklist • Text 	<p>Before the Assignment: {!varText} is Blue.</p> <p>Assignment: {!varText} add Yellow.</p> <p>After the Assignment: {!varText} is BlueYellow.</p>

Operators in Flow Conditions

Use condition operators to verify the value of a selected resource. Conditions are used in Decision elements and Wait elements.

Use this reference, divided up by the data type that you select for Resource, to understand the supported operators.

- [Boolean](#)
- [Choice](#)
- [Collection](#)
- [Currency](#)
- [Date](#)
- [Date/Time](#)
- [Multi-Select Picklist](#)
- [Number](#)
- [Picklist](#)
- [sObject](#)
- [Text](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Boolean

Check whether a Boolean resource's value matches another value or resource.

Operator	True if...	Supported Data Types
does not equal	The value of the selected Resource doesn't match what you enter or select for Value.	Boolean
equals	The value of the selected Resource matches what you enter or select for Value. An outcome resolves to true if the flow interview took that outcome. A wait event resolves to true if all of the waiting conditions for that event are met.	Boolean
was set	The value for Resource is a field in an sObject variable, and that field has been populated with a value in the flow at least once.	Boolean
was visited	The selected Resource is an element in the flow, and it has been visited during the flow interview.	Boolean

Choice

Every choice resource has a data type and obeys the operator rules for that data type. However, choice resources support one extra operator that other resources don't, no matter what their data type is.

Operator	True if...	Supported Data Types
was selected	A user selected that choice or dynamic record choice in a screen choice input field. If your flow references the same choice option in multiple screens, was selected always evaluates to the most recent screen that the flow visited. If your flow references the same choice option with a user input in more than one place on the same screen, this operator always evaluates the first usage in the screen.	Boolean

Collection

Check whether a Collection resource's value contains or matches another value or resource.

Operator	True if...	Supported Data Types
contains	An item in the collection that's selected for Resource contains the exact same value as Value	Varies If the resource is an sObject collection variable, only sObject resources with the same object type are supported.

Operator	True if...	Supported Data Types
		Otherwise, only resources with the same data type are supported.
does not equal	The collection that's selected for Resource doesn't match the collection that's selected for Value Two sObject collection variables are unequal if they include different fields or if the fields have different values.	Collection If the resource is an sObject collection variable, only sObject collection variables with the same object type are supported. Otherwise, only collection variables with the same data type are supported.
equals	The collection that's selected for Resource matches the collection that's selected for Value Two sObject collection variables are equal if they include the same fields and those fields have the same values.	Collection If the resource is an sObject collection variable, only sObject collection variables with the same object type are supported. Otherwise, only collection variables with the same data type are supported.
is null	The collection that's selected for resource isn't populated with any values	Boolean

Currency and Number

Check whether a Currency or Number resource's value matches, is larger than, or is smaller than another value or resource.

Operator	True if...	Supported Data Types
does not equal	The value for Resource doesn't match what's entered or selected for Value	<ul style="list-style-type: none"> • Currency • Number
equals	The value for Resource matches what's entered or selected for Value	<ul style="list-style-type: none"> • Currency • Number

Operator	True if...	Supported Data Types
greater than	The value of the Resource is larger than what's entered or selected for Value	<ul style="list-style-type: none"> • Currency • Number
greater than or equal	The value of the Resource is larger than what's entered or selected for Value or is the same	<ul style="list-style-type: none"> • Currency • Number
less than	The value of the Resource is smaller than what's entered or selected for Value	<ul style="list-style-type: none"> • Currency • Number
less than or equal	The value of the Resource is smaller than what's entered or selected for Value or is the same	<ul style="list-style-type: none"> • Currency • Number
is null	Resource isn't populated with a value	Boolean
was set	The value for Resource is a field in an sObject variable, and that field has been populated with a value in the flow at least once	Boolean

Date and Date/Time

Check whether a Date or Date/Time resource's value matches, is before, or is after another value or resource.

Operator	True if...	Supported Data Types
does not equal	The value for Resource doesn't match what's entered or selected for Value	<ul style="list-style-type: none"> • Date • Date/Time
equals	The value for Resource matches what's entered or selected for Value	<ul style="list-style-type: none"> • Date • Date/Time
greater than	The value of the Resource is a later date or time than what's entered or selected for Value	<ul style="list-style-type: none"> • Date • Date/Time
greater than or equal	The value of the Resource is a later date or time than what's entered or selected for Value or is the same date or time	<ul style="list-style-type: none"> • Date • Date/Time
less than	The value of the Resource is an earlier date or time than what's entered or selected for Value	<ul style="list-style-type: none"> • Date • Date/Time
less than or equal	The value of the Resource is an earlier date or time than what's entered or selected for Value or is the same date or time	<ul style="list-style-type: none"> • Date • Date/Time

Operator	True if...	Supported Data Types
is null	Resource isn't populated with a value	Boolean
was set	The value for Resource is a field in an sObject variable, and that field has been populated with a value in the flow at least once	Boolean

Picklist

Check whether a Picklist resource's value matches or contains another value or resource.

 **Note:** These operators treat the resource's value as a text value.

Operator	True if...	Supported Data Types
contains	The value for Resource contains what's entered or selected for Value For example, if the value of <code>{!varPicklist}</code> is <code>yellow-green</code> , the condition <code>{!varPicklist} contains green</code> evaluates to true.	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number • Picklist • Text
does not equal	The value for Resource doesn't match what's entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number • Picklist • Text
equals	The value for Resource matches what's entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number

Operator	True if...	Supported Data Types
		<ul style="list-style-type: none"> Picklist Text
was set	The value for Resource is a field in an sObject variable, and that field has been populated with a value in the flow at least once	Boolean

Multi-Select Picklist

Check whether a multi-select picklist resource's value matches or contains another value or resource.

 **Note:** These operators treat the resource's value as a text value. If the resource's value includes multiple items, the operators treat the value as one string that happens to include semi-colons. It doesn't treat each selection as a different value. For example, the operators treat `red; blue; green` as a single value rather than three separate values.

Operator	True if...	Supported Data Types
contains	<p>The value for Resource contains what's entered or selected for Value</p> <p> Tip: When you use this operator for a multi-select picklist resource, be aware of the values that a user can enter. If you want to check that a specific value is included and that value is also included as part of another value, create a flow formula resource that uses the INCLUDES function.</p> <p>For example, your organization has a Color multi-select picklist value. Among the possible values are "green" and "yellow-green". If both "green" and "yellow-green" are acceptable values, use the contains operator in a flow condition. If only "green" is an acceptable value, create a formula that uses the INCLUDES() function.</p>	<ul style="list-style-type: none"> Boolean Currency Date Date/Time Multi-select Picklist Number Picklist Text
does not equal	<p>The value for Resource doesn't match what's entered or selected for Value</p> <p> Note: Order matters. If you aren't sure which order the values that you're checking for will appear in, use the INCLUDES() function in a flow formula. For example, if you compare "red; blue; green" to "blue; green; red" using the does not equal operator, that condition resolves to true.</p>	<ul style="list-style-type: none"> Boolean Currency Date Date/Time Multi-select Picklist Number Picklist Text
equals	<p>The value for Resource exactly matches what's entered or selected for Value</p> <p> Note: Order matters. If you aren't sure which order the values that you're checking for will appear in, use the INCLUDES() function in a flow formula. For example, if you compare "red; blue; green" to "blue; green; red" using the equals operator, that condition will resolve to false.</p>	<ul style="list-style-type: none"> Boolean Currency Date Date/Time

Operator	True if...	Supported Data Types
		<ul style="list-style-type: none"> Multi-select Picklist Number Picklist Text
was set	The value for Resource is a field in an sObject variable, and that field has been populated with a value in the flow at least once	Boolean

sObject

Check whether an sObject resource's value matches another value or resource.

Operator	True if...	Supported Data Types
does not equal	The value for Resource doesn't match what's entered or selected for Value	sObject with the same object type
equals	The value for Resource matches what's entered or selected for Value	sObject with the same object type
is null	Resource isn't populated with a value	Boolean

Text

Check whether a Text resource's value matches, contains, ends with, or starts with another value or resource.

 **Note:** Before values are compared to a text resource, they're converted into string values.

Operator	True if...	Supported Data Types
contains	The value for Resource contains what's entered or selected for Value	<ul style="list-style-type: none"> Boolean Currency Date Date/Time Multi-select Picklist Number Picklist Text

Operator	True if...	Supported Data Types
does not equal	The value for Resource doesn't match what's entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number • Picklist • Text
equals	The value for Resource matches what's entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number • Picklist • Text
ends with	The end of the value for Resource matches what's entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number • Picklist • Text
is null	Resource isn't populated with a value	Boolean
starts with	The beginning of the value for Resource matches what's entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number

Operator	True if...	Supported Data Types
		<ul style="list-style-type: none"> Picklist Text
was set	The value for Resource is a field in an sObject variable, and that field has been populated with a value in the flow at least once	Boolean

Operators in Flow Record Filters

A flow record filter narrows the scope of records that the flow operates on. For example, use a record filter to update only the contacts that are associated with the Acme Wireless account. When you add a Record Update element, use the record filters to narrow the scope to just the contacts whose parent account is Acme Wireless.

Use this reference, organized by the data type of the field that you select, to understand the supported operators.

- Address Fields
- Autonumber Fields
- Checkbox Fields
- Currency Fields
- Date Fields
- Date/Time Fields
- Email Fields
- Encrypted Text Fields
- External Lookup Relationship Fields
- Fax Fields
- Lookup Relationship Fields
- Multi-Select Picklist Fields
- Number Fields
- Parent Fields
- Percent Fields
- Phone Fields
- Picklist Fields
- Text Fields
- Text Area (Long) Fields
- Text Area (Rich) Fields
- URL Fields

Checkbox Fields

When you select a checkbox field under Field, these operators are available.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Operator	Filters to records where the selected field's value ...	Supported Data Types
does not equal	Doesn't match what you enter or select for Value	Boolean
equals	Matches what you enter or select for Value	Boolean
is null	Hasn't been populated with a value yet (if you select True for Value)	Boolean

Currency, Number, and Percent Fields

When you select a currency, number, or percent field under Field, these operators are available.

Operator	Filters to records where the selected field's value ...	Supported Data Types
does not equal	Doesn't match what's entered or selected for Value	<ul style="list-style-type: none"> • Currency • Number
equals	Matches what's entered or selected for Value	<ul style="list-style-type: none"> • Currency • Number
greater than	Is larger than what's entered or selected for Value	<ul style="list-style-type: none"> • Currency • Number
greater than or equal	Is larger than what's entered or selected for Value or is the same	<ul style="list-style-type: none"> • Currency • Number
is null	Hasn't been populated with a value yet (if you select True for Value)	Boolean
less than	Is smaller than what's entered or selected for Value	<ul style="list-style-type: none"> • Currency • Number
less than or equal	Is smaller than what's entered or selected for Value or is the same.	<ul style="list-style-type: none"> • Currency • Number

Date and Date/Time

When you select a date or date/time field under Field, these operators are available.

Operator	Filters to records where the selected field's value ...	Supported Data Types
does not equal	The value for Resource doesn't match what's entered or selected for Value	<ul style="list-style-type: none"> • Date • Date/Time
equals	The value for Resource matches what's entered or selected for Value	<ul style="list-style-type: none"> • Date • Date/Time
greater than	The value of the Resource is a later date or time than what's entered or selected for Value	<ul style="list-style-type: none"> • Date • Date/Time
greater than or equal	The value of the Resource is a later date or time than what's entered or selected for Value or is the same date or time	<ul style="list-style-type: none"> • Date • Date/Time
is null	Hasn't been populated with a value yet (if you select True for Value)	Boolean
less than	The value of the Resource is an earlier date or time than what's entered or selected for Value	<ul style="list-style-type: none"> • Date • Date/Time
less than or equal	The value of the Resource is an earlier date or time than what's entered or selected for Value or is the same date or time	<ul style="list-style-type: none"> • Date • Date/Time

Picklist and Text Fields

When you select a picklist or text field under Field, these operators are available.

Operator	Filters to records where the selected field's value ...	Supported Data Types
contains	Contains what's entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number • Picklist • Text
does not equal	Doesn't match what's entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date

Operator	Filters to records where the selected field's value ...	Supported Data Types
		<ul style="list-style-type: none"> • Date/Time • Multi-select Picklist • Number • Picklist • Text
equals	Matches what's entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number • Picklist • Text
ends with	Ends with what's entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number • Picklist • Text
is null	Hasn't been populated with a value yet (if you select True for Value)	Boolean
starts with	Begins with what's entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number • Picklist • Text

Multi-Select Picklist Fields

When you select a multi-select picklist field under Field, these operators are available.

 **Tip:** Be careful when using these operators to filter records based on a multi-select picklist field. Even if two resources have the same items in a multi-select picklist, they can be mismatched if these cases differ.

- The spacing before or after the semi-colon. For example, one resource’s value is “red; green; blue” and the other’s value is “red;green;blue”
- The order of the items. For example, one resource’s value is “red; green; blue” and the other’s value is “red; blue; green”

For best results, use the INCLUDES function in a flow formula.

Operator	Filters to records where the selected field’s value ...	Supported Data Types
does not equal	Doesn’t match what’s entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number • Picklist • Text
equals	Matches what’s entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number • Picklist • Text
ends with	Ends with what’s entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency • Date • Date/Time • Multi-select Picklist • Number • Picklist • Text
is null	Hasn’t been populated with a value yet (if you select True for Value)	Boolean
starts with	Begins with what’s entered or selected for Value	<ul style="list-style-type: none"> • Boolean • Currency

Operator	Filters to records where the selected field's value ...	Supported Data Types
		<ul style="list-style-type: none"> • Date • Date/Time • Multi-select Picklist • Number • Picklist • Text

Flow Event Types

`Event Type` drives the fields that you use to define an event in a flow `Wait` element. The available event types are both alarms, which consist of a date/time value—the base time—and an optional offset from that time.

The *base time*, which is always required, is the date/time value from which the alarm is based. If there's no offset for the alarm, the alarm is set to the exact value of the base time. The base time can be composed of one or multiple fields, based on the event type that you choose.

The *offset*, which is optional, is the amount of time before or after the base time at which the alarm occurs. An offset is always composed of two fields: `Offset Number` and `Offset Unit`. For example, if you want your alarm to occur three days after the base time, the number is `3` and the unit is `Days`.

IN THIS SECTION:

[Absolute Time Alarms](#)

An *absolute time alarm* waits for a defined time that's based off an absolute date/time value. For example, you can use this event type in a `Wait` element to do something a day after the flow interview starts to wait.

[Relative Time Alarms](#)

A *relative time alarm* waits for a defined time that's based off a date/time field on a record. For example, you can use this event type to do something three days before a contract ends.

SEE ALSO:

[Flow Wait Element](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Absolute Time Alarms

An *absolute time alarm* waits for a defined time that's based off an absolute date/time value. For example, you can use this event type in a Wait element to do something a day after the flow interview starts to wait.

When you configure a Wait element in a flow:

- Define what the flow is waiting for
- Assign information from the event after it occurs to flow variables

Event Conditions

The following parameters are available to define events with an `Event Type` of Alarm: Absolute Time.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Parameter	Description	Example
<code>Base Time</code>	A date/time value. If you enter values for <code>Offset Number</code> and <code>Offset Unit</code> , this field value is the base for the offset. You can manually enter a date/time value or reference a merge field or flow resource.	<code>{!\$Flow.CurrentDate}</code>
<code>Offset Number</code>	Optional. The number of days or hours to offset <code>Base Time</code> . Required if you set a value for <code>Offset Unit</code> . The value must be a manually entered integer. You can't use a merge field or flow resource for this value. To set the alarm to occur before <code>Base Time</code> , use a negative number. To set the alarm to occur after <code>Base Time</code> , use a positive number.	<code>-3</code>
<code>Offset Unit</code>	Optional. The unit to offset <code>Base Time</code> . Required if you set a value for <code>Offset Number</code> . Manually enter <i>Days</i> or <i>Hours</i> . You can't use a merge field or flow resource for this value.	<i>Days</i>

For an example of a flow that waits for an absolute time alarm, see [Sample Flow That Waits for a Single Event](#).

Event Outputs

Reference information from the event in your flow by assigning its outputs to flow variables.

Parameter	Description	Example
<code>Base Time</code>	The actual time at which the event occurred and the flow interview resumed.	<code>11/26/2014 10:12 AM</code>

Parameter	Description	Example
Event Delivery Status	<p>The status of the event when the flow interview resumed. After an event occurs, Salesforce delivers the event to the flow that's waiting for it, so that the flow knows to resume. Valid values are:</p> <ul style="list-style-type: none"> Delivered: The event was successfully delivered. Invalid: An error occurred during delivery, but the flow successfully resumed. 	Delivered

SEE ALSO:

[Flow Event Types](#)

Relative Time Alarms

A *relative time alarm* waits for a defined time that's based off a date/time field on a record. For example, you can use this event type to do something three days before a contract ends.

When you configure a Wait element in a flow:

- Define what the flow is waiting for
- Assign information from the event after it occurs to flow variables

Event Conditions

The following parameters are available to define events with an `Event Type` of Alarm: Relative Time.

Parameter	Description	Example
Object Type	<p>The API name of the object whose field you want to base the alarm on. See Supported Objects. on page 113</p> <p>You must manually enter a string. You can't use a merge field or flow resource for this value.</p>	<i>Contract</i>
Base Date/Time Field	<p>The API name for a date or date/time field on the specified object. If you enter values for <code>Offset Number</code> and <code>Offset Unit</code>, this field value is the base for the offset.</p> <p>Manually enter a string.</p>	<i>EndDate</i>
Record ID	<p>ID of the record that the alarm is based on. The record's object type must match <code>Object Type</code>.</p> <p>You can enter a string, merge field, or flow resource.</p>	<i>{!ContractId}</i>

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Parameter	Description	Example
Offset Number	Optional. The number of days or hours to offset Base Date/Time Field. Required if you set a value for Offset Unit. The value must be a manually entered integer. You can't use a merge field or flow resource for this value. To set the alarm to occur before Base Date/Time Field, use a negative number. To set the alarm to occur after Base Date/Time Field, use a positive number.	-3
Offset Unit	Optional. The unit to offset Base Date/Time Field. Required if you set a value for Offset Number. Manually enter <i>Days</i> or <i>Hours</i> . You can't use a merge field or flow resource for this value.	<i>Days</i>

For examples of flows that wait for relative time alarms, see [Sample Flow That Waits for Only the First Event](#) or [Sample Flow That Waits for Many Events](#).

Event Outputs

Reference information from the event in your flow by assigning its outputs to flow variables.

Parameter	Description	Example
Base Time	The actual time at which the event occurred and the flow interview resumed.	11/26/2014 10:12 AM
Event Delivery Status	The status of the event when the flow interview resumed. After an event occurs, Salesforce delivers the event to the flow that's waiting for it, so that the flow knows to resume. Valid values are: <ul style="list-style-type: none"> Delivered: The event was successfully delivered. Invalid: An error occurred during delivery, but the flow successfully resumed. 	Delivered

Supported Objects

You can create a relative time alarm for any custom object or any of the following standard objects.

- Account
- Asset
- Campaign
- CampaignMember
- Case
- CaseComment
- Certification

- CertificationDef
- CertificationSectionDef
- CertificationStep
- CertificationStepDef
- Contact
- Contract
- ContractLineItem
- DandBCompany
- DuplicateRecordItem
- DuplicateRecordSet
- EmailMessage
- Entitlement
- EntitlementContact
- EnvironmentHubMember
- EnvironmentHubMemberRel
- Event
- ExternalEventMapping
- FeedItem
- Goal
- GoalLink
- Idea
- IdentityProvEventLog
- Lead
- LiveAgentSession
- LiveChatTranscript
- LiveChatTranscriptEvent
- LiveChatTranscriptSkill
- Macro
- MacroAction
- MacroInstruction
- Metric
- MobileDeviceCommand
- Opportunity
- OpportunityLineItem
- OpportunitySplit
- OpportunityTeamMember
- Order
- OrderItem
- Organization
- PersonAccount

- Product2
- ProfileSkill
- ProfileSkillEndorsement
- ProfileSkillUser
- Question
- QuickText
- Quote
- QuoteLineItem
- Reply
- SOSSession
- SOSSessionActivity
- ServiceContract
- SignupRequest
- Site
- SocialPersona
- SocialPost
- Solution
- SsoUserMapping
- StreamingChannel
- Task
- UsageEntitlementPeriod
- User
- UserLicense
- UserProvisioningRequest
- WorkBadge
- WorkBadgeDefinition
- WorkCoaching
- WorkFeedback
- WorkFeedbackQuestion
- WorkFeedbackQuestionSet
- WorkFeedbackRequest
- WorkFeedbackTemplate
- WorkGoal
- WorkPerformanceCycle
- WorkReward
- WorkRewardFund
- WorkRewardFundType
- WorkThanks
- WorkUpgradeAction
- WorkUpgradeCustomer

- `WorkUpgradeUser`
- `articleType_kav`

SEE ALSO:

[Flow Event Types](#)

Flow Types

A flow or flow version's type determines which elements and resources are supported, as well as the ways that the flow can be distributed.

Standard Flow Types

The following flow types are supported in the Cloud Flow Designer.

Type	Description
Flow	<p>Requires user interaction, because it has one or more screens, steps, choices, or dynamic choices.</p> <p>This flow type doesn't support wait elements.</p> <p>A flow can be implemented with a custom button, custom link, direct URL, Visualforce page, or Salesforce1 action.</p>
Autolaunched Flow	<p>Doesn't require user interaction.</p> <p>This flow type doesn't support screens, steps, choices, or dynamic choices.</p> <p>An autolaunched flow can be implemented any way that a flow can, as well as with a process action, workflow action (pilot), or Apex code.</p>
User Provisioning Flow	<p>Provisions users for third-party services. A user provisioning flow can only be implemented by associating it with a connected app when running the User Provisioning Wizard. Provisions users for third-party services. For example, use this flow type to customize the user provisioning configuration for a connected app to link Salesforce users with their Google Apps accounts.</p>

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Other Flow Types

Not all flow types are supported in the Cloud Flow Designer. Some flow types are used in other parts of Salesforce. You can't create or edit these flows in the Cloud Flow Designer, so you don't see them in the list of flows. However, the Paused and Waiting Interviews list on the flow management page can display interviews with one of these types.

For example, when you run a process (from the Process Builder), a flow interview is created. You can monitor that interview in the Paused and Waiting Interviews list by looking for the type "Workflow".

Type	Description
Workflow	A running instance of a process created in the Process Builder.

SEE ALSO:

[Flow Properties](#)

[Flow and Flow Version Fields](#)

Flow Properties

A flow's properties consist of its name, description, interview label, and type. These properties drive the field values that appear on a flow or flow version's detail page. The properties of a flow and its flow versions are separate.

 **Tip:** The properties for a given flow's versions automatically match the active version's properties by default. In other words, if you have three versions and you activate version 2, Salesforce updates the properties for versions 1 and 3 to match version 2. However, if you edit the properties for an inactive version, that version's properties are no longer automatically updated to match the active version.

From the Cloud Flow Designer, click  to update the properties for a flow or a flow version.

Property	Description
Name	<p>The name for the flow or flow version. The name appears in the flow management page and flow detail page. It also appears in the run time user interface.</p> <p>You can edit the name for inactive flows and flow versions.</p>
Unique Name	<p>The unique name for the flow. The unique name is used to refer to this flow from other parts of Salesforce, such as in a URL or Visualforce page. A unique name is limited to underscores and alphanumeric characters. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores. The unique name appears on the flow detail page.</p> <p>You can't edit the unique name after the flow has been saved.</p>
Description	<p>The description for the flow or flow version. The description appears in the flow management page and flow detail page.</p> <p>You can edit the description for inactive flows and flow versions.</p>
Type	<p>The type for the flow or flow version. The type appears in the flow management page and flow detail page. It determines which elements and resources are supported in the flow or flow version, as well as the ways that the flow can be implemented. For details, see Flow Types on page 116.</p>

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Property	Description
	If the type is Login Flow, you can't update the type after the flow has been saved.
Interview Label	<p>The label for the flow's interviews. An <i>interview</i> is a running instance of a flow. This label appears in:</p> <ul style="list-style-type: none"> The Paused and Waiting Interviews list on the flow management page The Paused Interviews component on the Home tab The Paused Interviews item in Salesforce1 <p>You can edit the interview label for inactive flows and flow versions. By default, the interview label contains the flow name and the <code>{!\$Flow.CurrentDateTime}</code> system variable.</p> <p>Use a text template to reference multiple resources in the label. For example, Flow Name - <code>{!Account.Name} - {!\$Flow.CurrentDateTime}</code>.</p>

SEE ALSO:

[Save a Flow](#)[Flow and Flow Version Fields](#)

Sample Flows

Sometimes showing is better than telling. Check out these sample flows to get a feel for how to work with advanced things like Wait elements and collection variables.

IN THIS SECTION:

[Sample Flow That Populates a Collection Variable](#)

Populate a collection variable by populating an sObject collection variable. Then individually assign the sObject collection variable's values to the collection variable.

[Sample Flows That Wait for Events](#)

Configure a flow to wait for events in one of three ways.

[Sample Flow That Loops Through a Collection](#)

Transfer ownership of accounts from one user to another by using sObject variable collections and loops. The flow already has the required user IDs.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Sample Flow That Populates a Collection Variable

Populate a collection variable by populating an sObject collection variable. Then individually assign the sObject collection variable's values to the collection variable.

Scenario

In this scenario, you're designing a flow to send an email to every employee who lives in San Francisco.

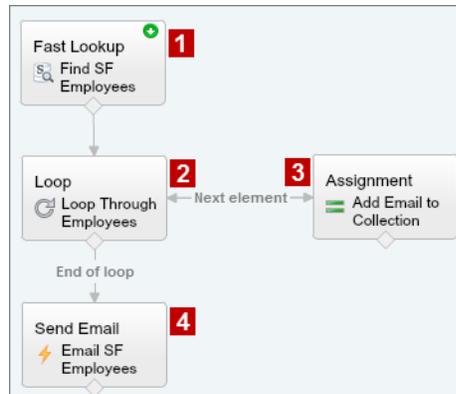
The Send Email element allows you to easily send emails from a flow. However, the Recipients parameter only accepts text variables and text collection variables. Since multiple users live in San Francisco, use a collection variable (rather than entering the email address for each individual user).

You can't use a Fast Lookup or Record Lookup to populate collection variables. First populate a User-based sObject collection variable with field values, including `Email`, from the employees who live in San Francisco. Then add those emails to the collection variable.

Once the collection variable is populated, you simply use the collection variable as the value for the Send Email element's `Email Addresses (collection)` parameter.

 **Example:** This flow already contains these resources.

- A User-based sObject collection variable called `employeesInSF`
- A User-based sObject variable called `loopVariable`
- A Text-based collection variable called `emails_employeesInSF`



The example flow:

1. Finds all user records whose `City` is "San Francisco" and populates `employeesInSF` with those records' `Email`. Because `employeesInSF` is an sObject collection variable, use a Fast Lookup element to populate the variable.
2. Loops through the sObject collection variable so that it can look at each individual user record. The loop copies the values of each item in `employeesInSF` to `loopVariable`.
3. For each iteration, assigns the user's `Email` to a collection variable that has a Data Type of Text.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

- When the loop ends, the flow sends an email to the users whose emails are now stored in `emails_employeesInSF`.

SEE ALSO:

- [Flow Collection Variable Resource](#)
- [Add Values to a Collection Variable](#)

Sample Flows That Wait for Events

Configure a flow to wait for events in one of three ways.

IN THIS SECTION:

[Sample Flow That Waits for Many Events](#)

This flow waits for many events to occur, rather than just the first event. The base times for these events are field values, so this example uses relative time alarms.

[Sample Flow That Waits for Only the First Event](#)

This flow waits for the first of multiple events to occur before proceeding. The base times for these events are field values, so this example uses relative time alarms.

[Sample Flow That Waits for a Single Event](#)

This flow waits for a single event. The base time for the event in this example, which is an absolute alarm, is the `{!$Flow.CurrentDateTime}` system variable.

SEE ALSO:

- [Flow Wait Element](#)

Sample Flow That Waits for Many Events

This flow waits for many events to occur, rather than just the first event. The base times for these events are field values, so this example uses relative time alarms.

You're designing a flow that reminds contract owners to follow up with their customers before the contract ends. Rather than sending just one reminder, however, the flow sends them regularly. This example shows how to use one Wait element to send a reminder two weeks before and then again one week before the contract ends. You could easily extend this flow to send reminders at more intervals, such as three days and one day before the contract ends.

Example

This flow already contains these populated variables.

- `{!contract}` is an sObject variable that contains the contract's `Id` and `OwnerId`
- `{!oneWeekVisited}` is a Boolean variable whose default value is `{!$GlobalConstant.False}`
- `{!twoWeeksVisited}` is a Boolean variable whose default value is `{!$GlobalConstant.False}`

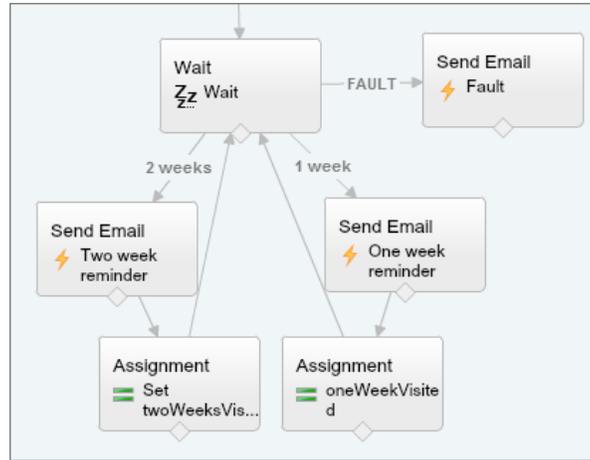
Before the flow executes the Wait element, it looks up and stores the contract's `Id` and `OwnerId`.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer



Because the flow sends the reminder emails both two weeks and a week before the contract’s end date, the Wait element defines two relative alarm events.

Tip: Every alarm event consists of a base time and an offset. With relative time alarms, the flow needs three pieces of information to determine the base time: the object, the date/time field, and the specific record. The offset for relative time alarms works the same as it does for absolute time alarms. The flow needs to know the unit (either *Days* or *Hours*) and the number of those units. To wait for a number of days or hours before the base time, set *Offset Number* to a negative integer.

For both of these events, the offset is declared in *Days*, because weeks isn’t an acceptable offset unit.

The base time for the first event (“2 Weeks”) is the value of `Contract.EndDate` (1) on the record whose ID is stored in `{!contract.Id}` (2). The offset is -14 days (3) to represent two weeks.

Record ID	{!contract.Id}	2
Base Date/Time Field	EndDate	1
Object Type	Contract	
Offset Number	-14	3
Offset Unit	Days	

You want to use the same Wait element for every reminder, so after a flow interview sends one email reminder, it returns to the Wait element. But first, to ensure that the interview doesn’t send the same email again and again, use *waiting conditions*. When an interview executes a Wait element, it first checks the waiting conditions for each event to determine whether to wait for those events. If an event has waiting conditions set and those conditions aren’t met, the interview doesn’t wait for that event.

For the first event, the interview checks whether the Boolean variable `{!twoWeekVisited}` is set to false. The variable’s default value is set to `{!$GlobalConstant.False}`, so the flow waits for the event until the variable’s value is changed.

▼ Waiting Conditions

Wait for this event only if additional conditions are met
 If these conditions aren't met when the interview hits this Wait element, the interview doesn't wait for this event. Instead, it waits for the other defined events. If the conditions aren't met for all of the defined events, the interview takes the Wait element's default path.

Resource	Operator	Value
{!twoWeeksVisited}	equals	{!\$GlobalConstant.False}

Indicate what the flow does when the "2 Weeks" event occurs by connecting the Wait element to other elements. Then, before you return the flow path to the Wait element, change the value of `{!twoWeeksVisited}` to `{!$GlobalConstant.True}`. You can do so with an Assignment element. If the value for `{!twoWeeksVisited}` isn't false when the Wait element is executed, the flow doesn't wait for the "2 Weeks" event to occur. Essentially, the interview checks whether the first event has occurred yet, since the variable is changed to true only in that event's path. If that event has occurred (and the variable isn't set to false), the interview knows not to wait for that event.

The second event ("1 Week") has the same base time as the first event **(4)**; the offset is -7 days **(5)** to represent a week.

Record ID	{!contract.Id}	
Base Date/Time Field	EndDate	4
Object Type	Contract	
Offset Number	-7	5
Offset Unit	Days	

For the second event, the flow checks whether the Boolean variable `{!oneWeekVisited}` is set to false. If it isn't, the flow doesn't wait for this event.

▼ Waiting Conditions

Wait for this event only if additional conditions are met
 If these conditions aren't met when the interview hits this Wait element, the interview doesn't wait for this event. Instead, it waits for the other defined events. If the conditions aren't met for all of the defined events, the interview takes the Wait element's default path.

Resource	Operator	Value
{!oneWeekVisited}	equals	{!\$GlobalConstant.False}

Like with the first event, use an Assignment element to change the value of `{!oneWeekVisited}` to `{!$GlobalConstant.True}` before the flow path returns to the Wait element. As long as `{!oneWeekVisited}` isn't false, the flow doesn't wait for the "1 Weeks" event to occur.



Tip: When a flow executes a Wait element and all the events have waiting conditions that aren't met, the flow executes the *default event path*. Because this flow is finished after it sends the final reminder, don't connect the default path to another element.

Just in case something goes wrong, set a fault path. In this example, the fault path sends an email that contains the fault message to the user who created the flow.

Sample Flow That Waits for Only the First Event

This flow waits for the first of multiple events to occur before proceeding. The base times for these events are field values, so this example uses relative time alarms.

You're designing a flow that reminds account owners to follow up with their customers a week before either the account renews or the contract ends. The flow sends a reminder email for whichever date occurs first.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

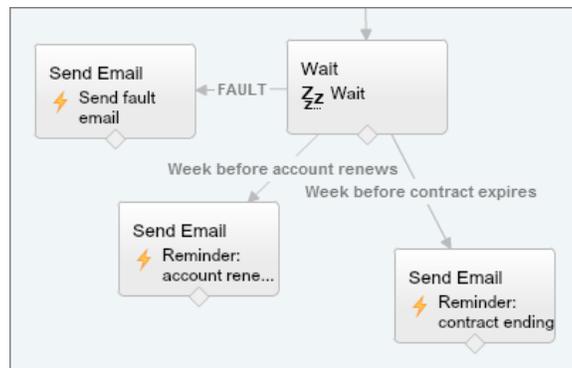
- Enterprise
- Performance
- Unlimited
- Developer

Example

This flow already contains these populated variables.

- `{!accountId}` contains the ID for the account
- `{!contractId}` contains the ID for the contract
- `{!accountOwner}` contains the ID for the account's owner
- `{!ownerEmail}` contains the account owner's email address

Before the flow executes the Wait element, it looks up and stores the contract's ID, its parent account's ID and OwnerId, and the account owner's Email.



The Wait element defines two relative alarm events.



Tip: Every alarm event consists of a base time and an offset. With relative time alarms, the flow needs three pieces of information to determine the base time: the object, the date/time field, and the specific record. The offset for relative time alarms works the same as it does for absolute time alarms. The flow needs to know the unit (either *Days* or *Hours*) and the number of those units. For both of these events, the base time is offset by -7 days, because weeks isn't an acceptable offset unit.

The base time for the first event ("Week before account renews") is the value of `Account.Renewal_Date__c` (1) on the record whose ID is stored in `{!accountId}` (2). The offset is -7 days (3).

Record ID	<code>{!accountId}</code>	2
Base Date/Time Field	<code>Renewal_Date__c</code>	1
Object Type	Account	
Offset Number	-7	3
Offset Unit	Days	

The base time for the second event (“Week before contract expires”) is the value of `Contract.EndDate` (4) on the record whose ID is stored in `{!contractId}` (5). The offset is -7 days (6).

Record ID	{!contractId}	5
Base Date/Time Field	EndDate	4
Object Type	Contract	
Offset Number	-7	6
Offset Unit	Days	

You only want to send one follow-up reminder and the flow always waits for both events, so neither of these events need waiting conditions. However, just in case something goes wrong, set a fault path. In this example, the fault path sends an email that contains the fault message to the user who created the flow.

SEE ALSO:

- [Flow Wait Element](#)
- [Relative Time Alarms](#)
- [Flow Wait Element](#)
- [Relative Time Alarms](#)
- [What Are Waiting Conditions?](#)

Sample Flow That Waits for a Single Event

This flow waits for a single event. The base time for the event in this example, which is an absolute alarm, is the `{!$Flow.CurrentDateTime}` system variable.

You’re designing a flow that requests feedback from customers after a contract is activated, but you want to delay the email by a day.

Example

This flow already contains the following populated variables.

- `{!customerEmail}` contains the email address for the customer
- `{!creatorEmail}` contains the email address for the flow’s creator

The flow activates a contract (1) and then waits (2).

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer



Within the Wait element, a single event is defined (1 day after activated). The flow sends the feedback request one day after the contract is activated, so use an absolute time alarm. The base time is the `{!$Flow.CurrentDateTime}` system variable **(3)**, and the offset is one day **(4)**.

The screenshot shows the configuration for a Wait element in a Salesforce Flow. The event is named "1 day after activated" with a unique name "X1_day_after_activated" and an event type of "Alarm: Absolute Time". Under "Event Conditions", the "Define the event that you want to wait for." section is expanded. It shows a "Target" table with "Base Time" set to the system variable `{!$Flow.CurrentDateTime}` (marked with a red '3'). Below this, the "Offset Number" is set to "1" and the "Offset Unit" is set to "Days" (both marked with a red '4').

Because there's only one event and you only want the feedback request to be sent once, don't set any waiting conditions for this event. However, just in case something goes wrong, don't forget to set a fault path. In this example, the fault path sends an email that contains the fault message to the user who created the flow.

SEE ALSO:

[Flow Wait Element](#)

[Absolute Time Alarms](#)

Sample Flow That Loops Through a Collection

Transfer ownership of accounts from one user to another by using sObject variable collections and loops. The flow already has the required user IDs.

First, create an Account-based sObject collection variable called `collAcctJSmiTh` and populate it with all account records that John Smith owns.

Then create a loop that iterates through the collection. For each item in the collection, the loop does the following:

1. Assigns the collection item to the loop variable.
2. Evaluates whether the account has more than 10,000 employees.
3. If the account has more than 10,000 employees, assigns Madison's user ID to the `OwnerId` field in the loop variable.
4. If the account doesn't have more than 10,000 employees, assigns Amber's user ID to the `OwnerId` field in the loop variable.
5. Adds the loop variable's values as a new item in a second collection called `collReassignedAccts`.

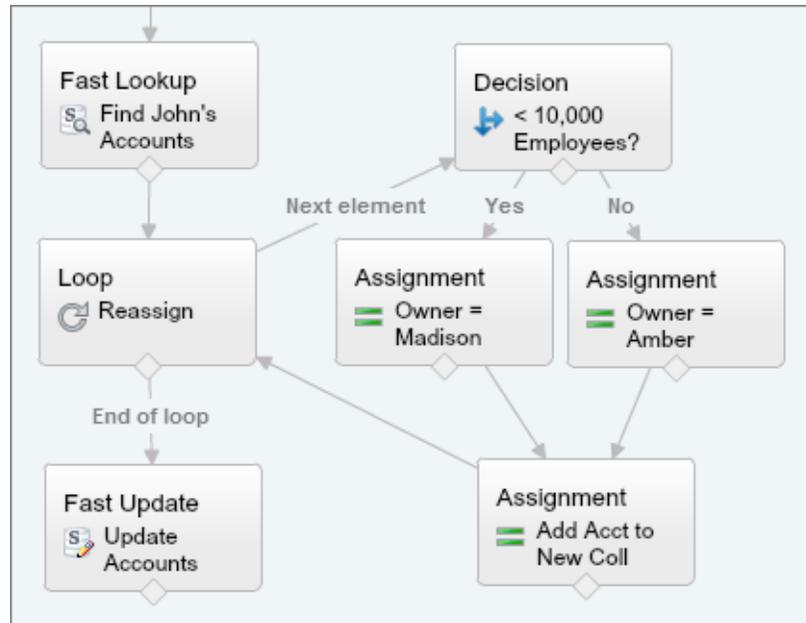
Finally, create a Fast Update element to update the accounts in `collReassignedAccts` with the new `OwnerId` after the loop finishes iterating through the collection.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer



This section of the flow uses a single query to look up the list of accounts and a single DML statement to update those accounts. If you created a similar flow by using Record Update elements, you would use:

- One Record Update element to find all accounts that John owns and have more than 10,000 employees (1 query). Then update those records' `ownerId` to Madison's Id (1 DML statement).
- One Record Update element to find all accounts that John owns and don't have more than 10,000 employees (1 query). Then update those records' `ownerId` to Amber's Id (1 DML statement).

CHAPTER 4 Manage Your Flows

Use the flow detail page to do anything with your flow outside of designing it—such as activating a flow, testing it, or viewing its properties.

To visit a flow's detail page, from Setup, enter *Flows* in the *Quick Find* box, select **Flows**, and then click a flow name.

IN THIS SECTION:

[Flow and Flow Version Fields](#)

View information about a flow and its versions on the flow detail page, like its name and URL.

[Open and Modify a Flow](#)

To modify a flow, open it in the Cloud Flow Designer.

[Test a Flow](#)

Test your flows before you activate them to make sure they're working as expected.

[Activate or Deactivate a Flow Version](#)

You can have several different versions of a single flow in Salesforce, but only one version of each flow can be active at a time. To activate or deactivate a version of a flow, go to that flow's detail page in Setup.

[Delete a Paused or Waiting Flow Interview](#)

If you no longer need to wait for a long-running flow interview to finish or for a user to resume a paused interview, delete the interview. For example, when you're updating or deleting the associated flow version.

[Delete a Flow Version](#)

To delete an active flow version, first deactivate it. If a flow has any paused or waiting interviews, it can't be deleted until those interviews are finished or deleted. Flows that have never been activated can be deleted immediately.

[Let Users Pause Flows](#)

Enable your users to pause a flow interview that they can't finish yet by customizing your organization's workflow and approval settings. A *flow interview* is a running instance of a flow. For example, a customer service representative can pause a flow interview when the customer doesn't have all the necessary information.

SEE ALSO:

[Visual Workflow](#)

[Limits for Visual Workflow](#)

[Considerations for Managing Flows](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Flow and Flow Version Fields

View information about a flow and its versions on the flow detail page, like its name and URL.

Property	Description
Active Version	Identifies which version is active.
Description	The description for the flow or flow version
Flow Name	The name for the flow. It appears in the run time user interface.
Name	The name for the flow version. It becomes the <code>Flow Name</code> when this version is active.
Namespace Prefix	The flow's namespace prefix, if it was installed from a managed package. The Cloud Flow Designer can't open flows that are installed from managed packages.
Type	Determines which elements and resources are supported in the flow or flow version, as well as the ways that the flow can be distributed. For details, see Flow Types on page 116.
Status	Identifies whether the flow version is active or not.
Unique Name	Lets you refer to the flow from other parts of Salesforce, such as in Visualforce page.
URL	The relative URL that you can use to run the flow, such as from a custom button or Web tab.
Version	The number of the flow version.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

SEE ALSO:

[Manage Your Flows](#)

[Flow Properties](#)

Open and Modify a Flow

To modify a flow, open it in the Cloud Flow Designer.

You can't save changes to an active flow version. You can, however, open an active version of a flow, modify it, and then save as a new version or a new flow.

1. From Setup, enter *Flows* in the **Quick Find** box, then select **Flows**.
2. Click the name of the flow.
3. Open the flow.
 - To open a specific version, click the **Open** link next to that version number.
 - To open the active version of the flow, click the **Open** button. If there isn't an active version, the latest version opens.

SEE ALSO:

[Considerations for Designing Flows](#)

[Manage Your Flows](#)

[Activate or Deactivate a Flow Version](#)

Test a Flow

Test your flows before you activate them to make sure they're working as expected.

 **Warning:** Be careful when testing flows that contain delete elements. Even if the flow is inactive, it triggers the delete operation.

We recommend that you test all possible paths through the flow, so that you can find and fix any errors before activating the flow. For example, incomplete data in the flow can cause a data element (create, update, lookup, or delete) to fail at run time. Add a fault connector to a path that corrects the data and allows the flow to successfully finish.

1. From Setup, enter *Flows* in the **Quick Find** box, then select **Flows**.
2. Click the name of the flow you want to run.
3. Run the flow.
 - To run a specific version, click the **Run** link for that version.
 - To run the active version of the flow, click the **Run** button. If there isn't an active version, the latest version runs.
 - To run a flow version from the Cloud Flow Designer, open that version and then click **Run** from the button bar.

 **Tip:** If you recently modified the flow that you're testing, save it. Only the most recently saved changes are included when you run a flow.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To open a flow in the Cloud Flow Designer:

- "Manage Force.com Flow"

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To run an active or inactive flow from the flow detail page:

To run a flow from within the Cloud Flow Designer:

- "Manage Force.com Flow"

Once you're confident that your flow is working as expected, activate the version that you tested and then distribute the flow.

SEE ALSO:

- [Activate or Deactivate a Flow Version](#)
- [Customize What Happens When a Flow Fails](#)
- [Considerations for Running Flows](#)
- [Manage Your Flows](#)

Activate or Deactivate a Flow Version

You can have several different versions of a single flow in Salesforce, but only one version of each flow can be active at a time. To activate or deactivate a version of a flow, go to that flow's detail page in Setup.

When you activate a new version of a flow, the previously activated version (if one exists) is automatically deactivated. Any running flow interview continues to run using the version with which it was initiated.

1. From Setup, enter *Flows* in the *Quick Find* box, then select **Flows**.
2. Click the name of the flow.
3. Click **Activate** or **Deactivate** next to the relevant version of the flow.

SEE ALSO:

- [Considerations for Managing Flows](#)
- [Manage Your Flows](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To activate or deactivate a flow:

- "Manage Force.com Flow"

Delete a Paused or Waiting Flow Interview

If you no longer need to wait for a long-running flow interview to finish or for a user to resume a paused interview, delete the interview. For example, when you're updating or deleting the associated flow version.

1. From Setup, enter *Flows* in the **Quick Find** box, then select **Flows**.
If there are waiting interviews for any of your flows, the Paused and Waiting Interviews related list appears underneath the list of flows.
2. For each interview that you want to delete, click **Del**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To open, edit, or create a flow in the Cloud Flow Designer:

- "Manage Force.com Flow"

Delete a Flow Version

To delete an active flow version, first deactivate it. If a flow has any paused or waiting interviews, it can't be deleted until those interviews are finished or deleted. Flows that have never been activated can be deleted immediately.

1. From Setup, enter *Flows* in the **Quick Find** box, then select **Flows**.
2. Click the name of the flow.
3. To delete the flow completely, including all versions, click the **Delete** button.
4. To delete an individual version, click the **Del** link for that version.

SEE ALSO:

[Considerations for Managing Flows](#)

[Manage Your Flows](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To delete a flow:

- "Manage Force.com Flow"

Let Users Pause Flows

Enable your users to pause a flow interview that they can't finish yet by customizing your organization's workflow and approval settings. A *flow interview* is a running instance of a flow. For example, a customer service representative can pause a flow interview when the customer doesn't have all the necessary information.

1. From Setup, enter *Process Automation Settings* in the Quick Find box, then select **Process Automation Settings**.
2. Select **Let Users Pause Flows**.
3. Click **Save**.

Screens don't automatically display the Pause button once **Let Users Pause Flows** is enabled. If you want your users to be able to pause at a given screen, select "Show Pause button" when you configure that screen.

SEE ALSO:

[Flow Screen Element: General Info](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To edit workflow and approval settings:

- "Customize Application"

CHAPTER 5 Distribute Your Flow

Once you've designed and tested your flow, it's time to put it to work! Flows can be executed in several ways, depending on who the flow is designed for. Internal users, external users, or systems can run a flow, or a flow can be deployed for another organization.

IN THIS SECTION:

[Distribute a Flow to Internal Users](#)

Enable your internal users to run your flow through the flow URL or a Visualforce page.

[Distribute a Flow to External Users](#)

Let external users run your flow by adding the flow to a Visualforce page and distributing that page externally. For example, through a Force.com site, Customer Portal, or Partner Portal.

[Launch a Flow Automatically](#)

Some flows don't require any user interaction to start. To enable a system to automatically launch a flow, use the `start` Apex method, a process, or a workflow action.

[Deploy a Flow to Other Organizations](#)

Flows created in the Cloud Flow Designer can be included in change sets and packages. The recipient organization of either the change set or package must have Visual Workflow enabled.

Distribute a Flow to Internal Users

Enable your internal users to run your flow through the flow URL or a Visualforce page.

IN THIS SECTION:

[Distribute a Flow URL](#)

Users in your organization who don't need a customized look and feel can run the flow via its URL. Distribute a flow URL directly or through a custom button, link, or Web tab.

[Embed a Flow in a Visualforce Page](#)

To customize your flow's look and feel for internal users, add the flow to a Visualforce page. Then distribute that page through a Visualforce tab, custom button, or custom link.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Distribute a Flow URL

Users in your organization who don't need a customized look and feel can run the flow via its URL. Distribute a flow URL directly or through a custom button, link, or Web tab.

1. From Setup, enter *Flows* in the *Quick Find* box, then select **Flows**.

2. Click the name of the flow.

3. Verify that there's an active version.

Only users with the "Manage Force.com Flow" permission can run inactive flows. If the flow contains subflow elements, the referenced flows must also have an active version.

4. Copy the flow URL, and append it to your instance.

For example:

```
http://na1.salesforce.com/flow/MyFlowName
```

If the flow was installed from a managed package, include the namespace prefix in the flow URL. For example:

```
http://na1.salesforce.com/flow/namespace/MyFlowName
```

5. To set the initial values of your flow's variables, append `?variable1=value1&variable2=value2` to the URL.

6. Distribute the flow URL.

Here are some examples:

- Create a custom button or link, and add it to a page layout.
- Create a Web tab, and add it to the appropriate profiles.

IN THIS SECTION:

[Set Flow Variables from a Flow URL](#)

When you distribute a flow using a URL, you can set the initial values of flow variables and collection variables by using parameters in the URL.

[Set Flow Finish Behavior with a Flow URL](#)

By default, when a flow interview that uses screens finishes, a new interview for that flow begins and the user is redirected to the first screen. If you want users to be redirected to another page within Salesforce when they click **Finish**, use the `retURL` parameter in the flow URL.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To view flow detail pages:

- "Manage Force.com Flow"

Set Flow Variables from a Flow URL

When you distribute a flow using a URL, you can set the initial values of flow variables and collection variables by using parameters in the URL.

Implementation Tips

- You can't set the values for sObject variables or sObject collection variables using URL parameters. The variable that you want to set must have its `Input/Output Type` set to allow input access.
- Variable names are case-sensitive. For example, you can't set the variable `varNumber` by entering `VarNumber` as a URL parameter.
- When you distribute a flow, don't pass a currency field value from a Salesforce record into a flow Currency variable with a URL parameter. When a currency field is referenced through a merge field (such as `{!Account.AnnualRevenue}`), the value includes the unit of currency's symbol (for example, \$). Flow variables of type Currency can accept only numeric values, so the flow fails at run time. Instead, pass the record's ID to a flow Text variable with a URL parameter. Then in the flow, use the ID to look up that record's value for the currency field.

EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Format

To set the initial value of a flow variable:

```
http://instance.salesforce.com/flow/flowName?variableName=value
```

To set the initial value of a flow variable when launching a specific version of a flow:

```
http://instance.salesforce.com/flow/flowName/flowVersionNumber?variableName=value
```

 **Note:** Only users with the “Manage Force.com Flow” permission can run inactive flows.

To set the initial values of multiple flow variables:

```
http://instance.salesforce.com/flow/flowName?variable1Name=value1&variable2Name=value2
```

To set the initial values for items in a collection variable:

```
http://instance.salesforce.com/flow/flowName?collection=value1&collection=value2
```

Valid Values

Variable Type	Acceptable Values
Date	Merge field of type Date or YYYY-MM-DD
DateTime	Merge field of type Date/Time or YYYY-MM-DDThh:mm:ssZ
Text	Merge field of any type or a string
Number	Merge field of type Number or a numeric value
Currency	Merge field of type Number or a numeric value

Variable Type	Acceptable Values
---------------	-------------------

Boolean	<ul style="list-style-type: none"> • Merge field of type Checkbox • True values: <code>true</code> or <code>1</code> • False values: <code>false</code> or <code>0</code>
---------	--

Examples

The following example is a flow URL that is used in a custom button on a case page layout. When a user clicks that button, the flow launches with the `varID` variable (of type Text) set to the case record's `CaseNumber` field value.

```
http://na1.salesforce.com/flow/Case_Management?varID={!Case.CaseNumber}
```

The following example sets the `varUserFirst` and `varUserLast` variables (both of type Text) to the running user's `FirstName` and `LastName` field values.

```
http://na1.salesforce.com/flow/User_Info?varUserFirst={!$User.FirstName}&varUserLast={!$User.LastName}
```

The following example is a flow URL that is used in a custom button on a contact page layout. When a user clicks that button, the flow launches and adds text values from the contact as items in the `{collNames}` text collection variable.

```
http://na1.salesforce.com/flow/Contact_Info?collNames={!Contact.FirstName}&collNames={!Contact.LastName}
```

Set Flow Finish Behavior with a Flow URL

By default, when a flow interview that uses screens finishes, a new interview for that flow begins and the user is redirected to the first screen. If you want users to be redirected to another page within Salesforce when they click **Finish**, use the `retURL` parameter in the flow URL.

Format

To redirect users to a specific page in Salesforce after they click **Finish**:

```
http://instance.salesforce.com/flow/flowName?retURL=page_name
```

where `page_name` is the part of the URL that comes after `http://instance.salesforce.com/`.

Limitations

- You can't redirect flow users to a URL that's external to your Salesforce organization.
- You can't use a flow variable as the value for the `retURL` parameter. If you want to use a flow variable to redirect a user, such as to a specific record, distribute the flow by using Visualforce.
- `retURL` can cause nested top and side navigation bars to render on the destination page.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Examples

The following flow URL redirects the user to the home tab for cases (`http://na1.salesforce.com/500/o`).

```
http://na1.salesforce.com/flow/Case_Management?retURL=500/o
```

The following flow URL sets the `varUserFirst` and `varUserLast` variables (both of type Text) to the running user's `FirstName` and `LastName` field values. When the flow interview finishes, the user is redirected to `http://na1.salesforce.com/home/home.jsp`.

```
http://na1.salesforce.com/flow/User_Info?varUserFirst={!$User.FirstName}
&varUserLast={!$User.LastName}&retURL=home/home.jsp
```

SEE ALSO:

[Troubleshoot Flow URLs](#)

Embed a Flow in a Visualforce Page

To customize your flow's look and feel for internal users, add the flow to a Visualforce page. Then distribute that page through a Visualforce tab, custom button, or custom link.

- Find the flow's unique name.
 - From Setup, enter *Flows* in the *Quick Find* box, then select **Flows**.
 - Click the name of the flow.
 - Copy the unique name of the flow.
- From Setup, enter *Visualforce Pages* in the *Quick Find* box, then select **Visualforce Pages**.
- Define a new Visualforce page, or open an existing one.
- Add the `<flow:interview>` component somewhere between the `<apex:page>` tags.
- Set the `name` attribute to the unique name of the flow.

For example:

```
<apex:page>
<flow:interview name="flowuniqueName"/>
</apex:page>
```

If the flow is from a managed package, the `name` attribute must be in this format: `namespace.flowuniqueName`.

- Click **Save**.
- Restrict which users can access the Visualforce page.
 - Click **Visualforce Pages**.
 - Click **Security** next to your Visualforce page.
 - Move all the appropriate profiles from Available Profiles to Enabled Profiles by using the add and remove buttons.
 - Click **Save**.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To create, edit, and set version settings for Visualforce pages:

- "Customize Application"

8. Add the Visualforce page to your Force.com app by using a custom button, link, or Visualforce tab.

IN THIS SECTION:

[Set Flow Variable Values from a Visualforce Page](#)

After you embed your flow in a Visualforce page, set the initial values of variables, sObject variables, collection variables, and sObject collection variables through the `<apex:param>` component.

[Get Flow Variable Values to a Visualforce Page](#)

Flow variable values can be displayed in a Visualforce page. Once you've embedded your flow in a Visualforce page, you can use Visualforce markup to get values for variables or sObject variables. To display values for a collection variable or an sObject collection variable, you can use Visualforce markup to get the individual values contained in the collection.

[Configure the Flow's Finish Behavior](#)

By default, users who click **Finish** start a new interview and see the first screen of the flow. After you embed a flow in a Visualforce page, configure the `finishLocation` attribute to route users to another page in Salesforce.

Set Flow Variable Values from a Visualforce Page

After you embed your flow in a Visualforce page, set the initial values of variables, sObject variables, collection variables, and sObject collection variables through the `<apex:param>` component.

 **Note:** You can set variables only at the beginning of an interview. The `<apex:param>` tags are evaluated only once, when the flow is launched.

You can set only variables that allow input access. For each flow variable, input access is controlled by:

- The `Input/Output Type` variable field in the Cloud Flow Designer
- The `isInput` field on `FlowVariable` in the Metadata API

If you reference a variable that doesn't allow input access, attempts to set the variable are ignored. Compilation can fail for the Visualforce page, its `<apex:page>` component, or the Apex class.

The following table lists the ways you can set a flow's variable, sObject variable, and sObject collection variable values using Visualforce.

Method	Variables	sObject Variables	Collection Variables	sObject Collection Variables
Without a controller	✓			
With a standard controller	✓	✓		
With a standard List controller				✓
With a custom Apex controller	✓	✓	✓	✓
With an Interview Map	✓	✓	✓	✓

Setting Variable Values without a Controller

This example sets `myVariable` to the value `01010101` when the interview starts.

```
<apex:page>
  <flow:interview name="flowname">
    <apex:param name="myVariable" value="01010101"/>
  </flow:interview>
</apex:page>
```

Setting Variable Values with a Standard Controller

You can use standard Visualforce controllers to set variables or sObject variables by passing in data from a record. This example sets the initial value of `myVariable` to the Visualforce expression `{!account}` when the interview starts.

```
<apex:page standardController="Account" tabStyle="Account">
  <flow:interview name="flowname">
    <apex:param name="myVariable" value="{!account}"/>
  </flow:interview>
</apex:page>
```

Setting an sObject Collection Variable Value with a Standard List Controller

Because sObject collection variables represent an array of values, you must use a standard list controller or a custom Apex controller. This example sets `myCollection` to the value of `{!accounts}` when the interview starts.

```
<apex:page standardController="Account" tabStyle="Account" recordSetVar="accounts">
  <flow:interview name="flowname">
    <apex:param name="myCollection" value="{!accounts}"/>
  </flow:interview>
</apex:page>
```

Setting Variable Values with a Custom Apex Controller

For finer control over your Visualforce page than a standard controller allows, write a custom Apex controller that sets the variable value, and then reference that controller in your Visualforce page. This example uses Apex to set `myVariable` to a specific account's Id when the interview starts.

```
public class MyCustomController {
  public Account apexVar {get; set;}

  public MyCustomController() {
    apexVar = [
      SELECT Id, Name FROM Account
      WHERE Name = 'Acme' LIMIT 1];
  }
}
```

```
<apex:page controller="MyCustomController">
  <flow:interview name="flowname">
    <apex:param name="myVariable" value="{!apexVar}"/>
  </flow:interview>
</apex:page>
```

This example uses Apex to set an sObject collection variable `myAccount` to the `Id` and `Name` field values for every record with a Name of `Acme`.

```
public class MyCustomController {
    public Account[] myAccount {
        get {
            return [
                SELECT Id, Name FROM account
                WHERE Name = 'Acme'
                ORDER BY Id
            ];
        }
        set {
            myAccount = value;
        }
    }
    public MyCustomController () {
    }
}
```

```
<apex:page id="p" controller="MyCustomController">
    <flow:interview id="i" name="flowname">
        <apex:param name="accountColl" value="{!myAccount}"/>
    </flow:interview>
</apex:page>
```

Setting Variable Values with an Interview Map

This example uses an Interview map to set the value for `accVar` to a specific account's `Id` when the interview starts.

```
public class MyCustomController {
    public Flow.Interview.TestFlow myflow { get; set; }

    public MyCustomController() {
        Map<String, Object> myMap = new Map<String, Object>();
        myMap.put('accVar', [SELECT Id FROM Account
            WHERE Name = 'Acme' LIMIT 1]);
        myflow = new Flow.Interview.ModemTroubleShooting(myMap);
    }
}
```

```
<apex:page controller="MyCustomController">
    <flow:interview name="flowname" interview="{!myflow}"/>
</apex:page>
```

Here's a similar example that sets the value for `accVar` to a new account when the interview starts.

```
public class MyCustomController {
    public Flow.Interview.TestFlow myflow { get; set; }

    public MyCustomController() {
        Map<String, List<Object>> myMap = new Map<String, List<Object>>();
        myMap.put('accVar', new Account(name = 'Acme'));
        myflow = new Flow.Interview.ModemTroubleShooting(myMap);
    }
}
```

```

    }
}

<apex:page controller="MyCustomController">
    <flow:interview name="flowname" interview="{!myflow}"/>
</apex:page>

```

This example uses a map to add two values to a string collection variable (`stringCollVar`) and two values to a number collection variable (`numberCollVar`).

```

public class MyCustomController {
    public Flow.Interview.flowname MyInterview { get; set; }

    public MyCustomController() {
        String[] value1 = new String[]{'First', 'Second'};
        Double[] value2 = new Double[]{999.123456789, 666.123456789};
        Map<String, Object> myMap = new Map<String, Object>();
        myMap.put('stringCollVar', value1);
        myMap.put('numberCollVar', value2);
        MyInterview = new Flow.Interview.flowname(myMap);
    }
}

```

```

<apex:page controller="MyCustomController">
    <flow:interview name="flowname" interview="{!MyInterview}" />
</apex:page>

```

Get Flow Variable Values to a Visualforce Page

Flow variable values can be displayed in a Visualforce page. Once you've embedded your flow in a Visualforce page, you can use Visualforce markup to get values for variables or sObject variables. To display values for a collection variable or an sObject collection variable, you can use Visualforce markup to get the individual values contained in the collection.

 **Note:** You can get only variables that allow output access. For each flow variable, output access is controlled by:

- The `Input/Output Type` variable field in the Cloud Flow Designer
- The `isOutput` field on `FlowVariable` in the Metadata API

If you reference a variable that doesn't allow output access, attempts to get the variable are ignored. Compilation can fail for the Visualforce page, its `<apex:page>` component, or the Apex class.

The following example uses an Apex class to get an sObject variable value from a flow and then displays it in a Visualforce page.

```

public class FlowController {
    public Flow.Interview.flowname myflow { get; set; }
    public Case apexCaseVar;
    public Case getApexCaseVar() {
        return myflow.caseVar;
    }
}

<apex:page controller="FlowController" tabStyle="Case">
    <flow:interview name="flowname" interview="{!myflow}"/>
    <apex:outputText value="Default Case Priority: {!apexCaseVar.Priority}"/>
</apex:page>

```

This example uses an Apex class to get the values that are stored in a string collection variable (`emailsCollVar`) in the flow. Then it uses a Visualforce page to run the flow interview. The Visualforce page iterates over the flow's collection variable and displays the values for each item in the collection.

```
public class FlowController {
    public Flow.Interview.flowname myflow { get; set; }

    public List<String> getVarValue() {
        if (myflow == null) {
            return null;
        }
        else {
            return (List<String>)myflow.emailsCollVar;
        }
    }
}
```

```
<apex:page controller="FlowController">
    <flow:interview name="flowname" interview="{!myflow}" />
    <apex:repeat value="{!varValue}" var="item">
        <apex:outputText value="{!item}" /><br/>
    </apex:repeat>
</apex:page>
```

The following example uses an Apex class to set the flow to `{!myflow}` and then uses a Visualforce page to run the flow interview. The Visualforce page uses a data table to iterate over the flow's `sObject` collection variable and display the values for each item in the collection.

```
public class MyCustomController {
    public Flow.Interview.flowname myflow { get; set; }
}
```

```
<apex:page controller="MyCustomController" tabStyle="Account">
    <flow:interview name="flowname" interview="{!myflow}" reRender="nameSection" />
    <!-- The data table iterates over the variable set in the "value" attribute and
    sets that variable to the value for the "var" attribute, so that instead of
    referencing {!myflow.collectionVariable} in each column, you can simply refer
    to "account".-->
    <apex:dataTable value="{!myflow.collectionVariable}" var="account"
        rowClasses="odd,even" border="1" cellpadding="4">
        <!-- Add a column for each value that you want to display.-->
        <apex:column >
            <apex:facet name="header">Name</apex:facet>
            <apex:outputlink value="/{!account['Id']}">
                {!account['Name']}
            </apex:outputlink>
        </apex:column>
        <apex:column >
            <apex:facet name="header">Rating</apex:facet>
            <apex:outputText value="{!account['Rating']}" />
        </apex:column>
        <apex:column >
            <apex:facet name="header">Billing City</apex:facet>
            <apex:outputText value="{!account['BillingCity']}" />
        </apex:column>
    </apex:dataTable>
</apex:page>
```

```

    <apex:column >
      <apex:facet name="header">Employees</apex:facet>
      <apex:outputText value="{!account['NumberOfEmployees']}" />
    </apex:column>
  </apex:dataTable>
</apex:page>

```

Depending on the contents of the sObject collection variable in your flow, here's what that data table looks like.

Name	Rating	Billing City	Employees
Global Media	Hot	Toronto	14668
ABC Labs	Warm	San Jose	120
Canson	Hot	Ohta-ku, Tokyo	125
Acme Inc.	Hot	Atlanta	680
Ecotech - Switzerland	Cold	Geneva	3500
Informatica Global	Warm	Buenos Aires	300
Lutron Technologies	Hot	Murray Hill	200
Sapient-UK	Cold	London	80
Targas	Warm	Anaheim	1200

Configure the Flow's Finish Behavior

By default, users who click **Finish** start a new interview and see the first screen of the flow. After you embed a flow in a Visualforce page, configure the `finishLocation` attribute to route users to another page in Salesforce.

Set `finishLocation` with the `URLFOR` Function

 **Note:** You can't redirect flow users to a URL that's external to your Salesforce organization.

To route users to a relative URL or a specific record or detail page, using its ID, use the `URLFOR` function.

This example routes users to the Salesforce home page.

```

<apex:page>
  <flow:interview name="MyUniqueFlow" finishLocation="{!URLFOR('/home/home.jsp')}" />
</apex:page>

```

This example routes users to a detail page with an ID of 001D000000lpE9X.

```

<apex:page>
  <flow:interview name="MyUniqueFlow" finishLocation="{!URLFOR('/001D000000lpE9X')}" />
</apex:page>

```

For details about `URLFOR`, see Functions in the *Visualforce Developer's Guide*.

Set `finishLocation` with the `$Page` Variable

To route users to another Visualforce page without using `URLFOR`, set `finishLocation` to the name of the destination page with the format `{!$Page.pageName}`.

```
<apex:page>
  <flow:interview name="MyUniqueFlow" finishLocation="{!$Page.MyUniquePage}"/>
</apex:page>
```

For details about `$Page`, see Global Variables in the *Visualforce Developer's Guide*.

Set `finishLocation` with a Controller

You can set `finishLocation` in a few ways with a custom controller.

This sample controller configures a flow's finish behavior in three different ways.

- `getPageA` instantiates a new page reference by passing a string to define the location.
- `getPageB` returns a string that is treated like a `PageReference`.
- `getPageC` returns a string that gets translated into a `PageReference`.

```
public class myFlowController {

    public PageReference getPageA() {
        return new PageReference('/300');
    }

    public String getPageB() {
        return '/300';
    }

    public String getPageC() {
        return '/apex/my_finish_page';
    }
}
```

Here's a sample Visualforce page references that controller and sets the flow finish behavior to the first option.

```
<apex:page controller="myFlowController">
  <h1>Congratulations!</h1> This is your new page.
  <flow:interview name="flowname" finishLocation="{!pageA}"/>
</apex:page>
```

If you use a standard controller to display a record on the same page as the flow, users who click **Finish** start a new flow interview and see the first screen of the flow, without the record. This is because the `id` query string parameter isn't preserved in the page URL. If needed, configure the `finishLocation` to route users back to the record.

Distribute a Flow to External Users

Let external users run your flow by adding the flow to a Visualforce page and distributing that page externally. For example, through a Force.com site, Customer Portal, or Partner Portal.

For example, you can set up a self-service tool for your public Force.com site to help visitors generate custom sales quotes. Because the flow is embedded in a Visualforce page, you can customize the appearance of the flow so that it uses your company's branding and style.

 **Note:** When you make a flow available to site or portal users, point them to the Visualforce page that contains the embedded flow, not the flow itself. Site and portal users aren't allowed to run flows directly.

To add a flow to a Visualforce page, embed it by using the `<flow:interview>` component.

1. Find the flow's unique name.
 - a. From Setup, enter *Flows* in the *Quick Find* box, then select **Flows**.
 - b. Click the name of the flow.
 - c. Copy the unique name of the flow.
2. From Setup, enter *Visualforce Pages* in the *Quick Find* box, then select **Visualforce Pages**.
3. Define a new Visualforce page, or open an existing one.
4. Add the `<flow:interview>` component somewhere between the `<apex:page>` tags.
5. Set the `name` attribute to the unique name of the flow.

For example:

```
<apex:page>
<flow:interview name="flowuniqueName" />
</apex:page>
```

If the flow is from a managed package, the `name` attribute must be in this format: `namespace.flowuniqueName`.

6. Click **Save**.
7. Restrict which users can access the Visualforce page.

Any external users with access to the Visualforce page can run the embedded flow.

 - a. Click **Visualforce Pages**.
 - b. Click **Security** next to your Visualforce page.
 - c. Move all the appropriate profiles from Available Profiles to Enabled Profiles by using the add and remove buttons.
 - d. Click **Save**.
8. Distribute your Visualforce page by taking one of these actions.
 - Add the Visualforce page to your Force.com site.

USER PERMISSIONS

To create, edit, and set version settings for Visualforce pages:

- "Customize Application"

- Define a custom Visualforce tab by using the Visualforce page, and then add that tab to your portal or community.

SEE ALSO:

[Configure the Flow's Finish Behavior](#)

[Get Flow Variable Values to a Visualforce Page](#)

[Set Flow Variable Values from a Visualforce Page](#)

Launch a Flow Automatically

Some flows don't require any user interaction to start. To enable a system to automatically launch a flow, use the `start` Apex method, a process, or a workflow action.

Most of these methods can be used only with an autolaunched flow. An *autolaunched flow* can be launched without user interaction, such as from a process or the Apex `Interview.start` method. Autolaunched flows run in bulk and without user interaction. They can't contain steps, screens, choices, or dynamic choices in the active or latest flow version. When a flow user invokes an autolaunched flow, the active flow version is run. If there's no active version, the latest version is run. When a flow admin invokes an autolaunched flow, the latest version is always run.

IN THIS SECTION:

[Start a Flow with a Process](#)

Just like workflow rules, processes start when a certain object's records are created or edited. Add a flow action to give a process even more functionality. For example, create a process that checks if a new feed item is a question. If it is, wait a day and then use a flow to check whether a Best Comment has been selected or not. If it hasn't, use that question to create a case.

[Start a Flow with a Workflow Action—Pilot](#)

Create a flow trigger workflow action to launch a flow from workflow rules. With flow triggers, you can automate complex business processes—create flows to perform logic, and have events trigger the flows via workflow rules—without writing code. For example, your flow looks up and assigns the relevant entitlement for a case. Create a flow trigger to launch the flow whenever a case is created, so that all new cases are automatically set with a default entitlement.

[Invoke a Flow from the Force.com REST API](#)

Use the Custom Invocable Actions endpoint to invoke an autolaunched flow from the Force.com REST API.

[Invoke a Flow with Apex](#)

Use the `start` method in the `Flow.Interview` class to launch an autolaunched flow or user provisioning flow from Apex.

Start a Flow with a Process

Just like workflow rules, processes start when a certain object's records are created or edited. Add a flow action to give a process even more functionality. For example, create a process that checks if a new feed item is a question. If it is, wait a day and then use a flow to check whether a Best Comment has been selected or not. If it hasn't, use that question to create a case.

1. Create and activate the autolaunched flow for the process to launch.
2. Create the process that you plan to launch this flow from.
For details, see "Creating Processes" in the Salesforce Help.
3. Add a "Launch a Flow" action to the process.

USER PERMISSIONS

To create or change processes:

- "Manage Force.com Flow"

AND

"View All Data"

- a. For `Flow`, search for and select the flow that you created.
 - b. Optionally, click **Add Row** to set values for the flow's variables.
4. Activate the process.

Start a Flow with a Workflow Action—Pilot

Create a flow trigger workflow action to launch a flow from workflow rules. With flow triggers, you can automate complex business processes—create flows to perform logic, and have events trigger the flows via workflow rules—without writing code. For example, your flow looks up and assigns the relevant entitlement for a case. Create a flow trigger to launch the flow whenever a case is created, so that all new cases are automatically set with a default entitlement.

 **Note:** The Process Builder has superseded flow trigger workflow actions, formerly available in a pilot program. Organizations that are using flow trigger workflow actions can continue to create and edit them, but flow trigger workflow actions aren't available for new organizations.

Before you begin, review the special behavior and limitations of flow triggers. See [Flow Trigger Considerations \(Pilot\)](#).

To set up a workflow rule to launch a flow:

1. Create and activate the autolaunched flow to launch from this workflow action.
2. Create the workflow rule that you plan to add this workflow action to.
3. [Define the flow trigger](#).
4. [Associate the flow trigger to the workflow rule](#).

Flow Trigger Considerations (Pilot)

Flow trigger workflow actions have special behaviors and limitations.

 **Note:** The Process Builder has superseded flow trigger workflow actions, formerly available in a pilot program. Organizations that are using flow trigger workflow actions can continue to create and edit them, but flow trigger workflow actions aren't available for new organizations.

Understand these considerations before you create flow triggers or add them to workflow rules.

- Flow triggers are available only for workflow rules. You can't use them as actions elsewhere, for example, in approval processes.
- Flow triggers are available on most—but not all—objects that are supported by workflow rules. You can see the list of supported objects when you create a new flow trigger. From Setup, enter *Flow Triggers* in the `Quick Find` box, then click **Flow Triggers**.
- Only active, autolaunched flows can be launched by flow triggers. However, if a flow trigger is in test mode, administrators run the latest flow version while other users run the active flow version.
- Flows that are launched from workflow rules are run in system context, which means that user permissions, field-level security, and sharing rules aren't taken into account during flow execution.

EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To view workflow rules and actions:

- "View Setup and Configuration"

To create or change workflow rules and actions:

- "Customize Application"

EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

- If a flow trigger fails at run time, the user who created or edited the record to meet the workflow rule criteria won't be able to save the record. To troubleshoot run time issues, see the flow action events in the `Workflow` category of debug logs, which show the flow version and the values passed into flow variables.
- A flow trigger can set the values of up to 25 variables and sObject variables in the flow, with the following limitations.
 - Flow triggers can't use multi-select picklist fields to set flow variables or sObject variables.
 - When a flow trigger uses a currency field to set a flow variable, only the amount is passed into the flow. Any currency ISO code or locale information is ignored. If your organization uses multiple currencies, the flow trigger uses the amount in the currency of the record that contains the specified currency field.
 - Flow triggers can't pass values into sObject collection variables in flows.
- Always keep one version of the flow active if it's referenced by an active workflow rule's flow trigger.
- Once you activate a workflow rule using the flow trigger, don't modify or add a version of the flow to include screens or other elements that would violate the run restrictions for an autolaunched flow. If you modify a flow to no longer be autolaunched, it can't be launched by flow triggers. To work around this situation, you can save the non-autolaunched flow as a new flow and change the new flow to become autolaunched. Then update the flow triggers to launch the new flow.
- Flow triggers aren't available as time-dependent workflow actions. You can add flow triggers to workflow rules only as immediate workflow actions.
- When the system executes a workflow rule with multiple flow triggers, those flows aren't run in any particular order.
- In a transaction, flow triggers are executed after all workflow field updates, including any Apex triggers and standard validations that are executed as a result of those workflow field updates. After executing flow triggers, the system executes escalation rules.
- Flows that are launched from workflow rules are governed by the per-transaction limits already enforced by Apex.
- When flows are launched from workflow rules that are triggered by bulk loads or imports, the flows' data manipulation language (DML) operations are executed in bulk to reduce the number of calls required and to optimize system performance. The execution of any of the following flow elements qualifies as a DML operation: Record Create, Record Update, Record Delete, Fast Create, Fast Update, or Fast Delete.

For example, suppose that you use Data Loader or the Bulk API to update 50 records, and those updates meet the criteria of a workflow rule with a flow trigger action. In response, the system executes 50 instances of the flow within the same transaction. Each instance of a running flow is called an interview. The system attempts to execute each DML operation across all the interviews in the transaction at the same time. Suppose that five of those interviews are executing the same branch of the flow, which has a Record Update element called "SetEntitlement." The system waits for all five interviews to reach that element, and then executes all five record updates in bulk.
- Flow triggers aren't available in change sets.
- Flow triggers aren't packageable.

Define a Flow Trigger—Pilot

After you create an autolaunched flow, create a flow trigger to launch that flow as part of a workflow rule.

 **Note:** The Process Builder has superseded flow trigger workflow actions, formerly available in a pilot program. Organizations that are using flow trigger workflow actions can continue to create and edit them, but flow trigger workflow actions aren't available for new organizations.

1. From Setup, enter *Flow Triggers* in the **Quick Find** box, then select **Flow Triggers**.
2. Click **New Flow Trigger**.
3. Select the same object as the workflow rule, and then click **Next**.
4. Configure the flow trigger.

Field	Description
Name	Name of the flow trigger.
Unique Name	Enter a unique name to refer to this component in the API. The requirement for uniqueness is only within the selected object type. You can have actions of the same type with the same unique name, provided they are defined for different objects. The <code>Unique Name</code> field can contain only underscores and alphanumeric characters. It must be unique within the selected object type, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Protected Component	Reserved for future use.
Flow	Unique name of the autolaunched flow that this workflow action launches.
Set Flow Variables	Whether to pass values into the flow's variables and sObject variables.

5. If you select `Set Flow Variables`, specify their names and values. Click **Set Another Value** to set up to 25 variables.
 6. To put the flow trigger in test mode, select `Administrators run the latest flow version`.
When selected and an administrator triggers the workflow rule, the flow trigger launches the latest version of the flow. For all other users, the flow trigger always launches the active version of the flow.
The same values are passed into the flow variables and sObject variables whether the flow trigger launches the active or latest flow version.
 7. Click **Save**.
- Don't forget to [associate the flow trigger to a workflow rule](#).

EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To view workflow rules and actions:

- "View Setup and Configuration"

To create or change workflow rules and actions:

- "Customize Application"

Associate the Flow Trigger with a Workflow Rule

Add the flow trigger as an immediate action on your workflow rule.

 **Note:** The Process Builder has superseded flow trigger workflow actions, formerly available in a pilot program. Organizations that are using flow trigger workflow actions can continue to create and edit them, but flow trigger workflow actions aren't available for new organizations.

Before you begin, create:

- An autolaunched flow
 - A workflow rule
 - A flow trigger that launches the autolaunched flow
1. From Setup, enter *Workflow Rules* in the Quick Find box, then select **Workflow Rules**.
 2. Select the workflow rule.
 3. Click **Edit** in the Workflow Actions section.
 4. In the Immediate Workflow Actions section, click **Add Workflow Action > Select Existing Action**.

Flow triggers aren't available as time-dependent workflow actions. You can add flow triggers to workflow rules only as immediate workflow actions.

5. In the Search drop-down list, select Flow Trigger.
The Available Actions box lists all existing flow triggers.
6. Select the flow trigger to associate with this workflow rule. Move the flow trigger to Selected Actions by using the right arrow.
7. Click **Save**.

Invoke a Flow from the Force.com REST API

Use the Custom Invocable Actions endpoint to invoke an autolaunched flow from the Force.com REST API.

 **Example:** This example invokes the active version of the flow "Escalate_to_Case".

```
POST /v33.0/actions/custom/flow/Escalate_to_Case
```

The request sets values for two of the flow's input variables: `CommentCount` and `FeedItemId`. Once invoked, the flow checks whether:

- A given feed item has more than five comments and
- A best comment hasn't been selected yet

```
{
  "inputs" : [ {
    "CommentCount" : 6,
    "FeedItemId" : "0D5D00000000cfMY"
  } ]
}
```

EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To select existing actions:

- "Customize Application"

Invoke a Flow with Apex

Use the `start` method in the `Flow.Interview` class to launch an autolaunched flow or user provisioning flow from Apex.

 **Example:** The following includes a sample controller that starts a flow and the corresponding Visualforce page. The Visualforce page contains an input box and a start button. When the user enters a number in the input box and clicks **Start**, the controller's `start` method is called. The button saves the user-entered value to the flow's `input` variable and launches the flow using the `start` method. The flow doubles the value of `input` and assigns it to the `output` variable, and the output label displays the value for `output` by using the `getVariableValue` method.

```
public class FlowController {

    //Instance of the Flow
    public Flow.Interview.doubler myFlow {get; set;}
    public Double value {get; set;}

    public Double getOutput() {
        if (myFlow == null) return null;
        return (Double) (myFlow.getVariableValue('v1'));
    }

    public void start() {
        Map<String, Object> myMap = new Map<String, Object>();
        myMap.put('v1', input);
        myFlow = new Flow.Interview.doubler(myMap);
        myFlow.start();
    }
}
```

The following is the Visualforce page that uses the sample flow controller.

```
<apex:page controller="FlowController">
    <apex:outputLabel id="text">v1 = {!output}</apex:outputLabel>

    <apex:form >
        value : <apex:inputText value="{!output}"/>
        <apex:commandButton action="{!start}" value="Start" reRender="text"/>
    </apex:form>
</apex:page>
```

IN THIS SECTION:

[start\(\)](#)

Invokes an autolaunched flow or user provisioning flow.

[getVariableValue\(variableName\)](#)

Returns the value of the specified flow variable. The flow variable can be in the flow embedded in the Visualforce page, or in a separate flow that is called by a subflow element.

start()

Invokes an autolaunched flow or user provisioning flow.

Signature

```
public Void start()
```

Return Value

Type: Void

Usage

This method can be used only with flows that have one of these types.

- Autolaunched Flow
- User Provisioning Flow

For details, see “[Flow Types](#)” in the *Visual Workflow Guide*.

When a flow user invokes an autolaunched flow, the active flow version is run. If there’s no active version, the latest version is run. When a flow admin invokes an autolaunched flow, the latest version is always run.

getVariableValue(variableName)

Returns the value of the specified flow variable. The flow variable can be in the flow embedded in the Visualforce page, or in a separate flow that is called by a subflow element.

Signature

```
public Object getVariableValue(String variableName)
```

Parameters

variableName

Type: String

Specifies the unique name of the flow variable.

Return Value

Type: Object

Usage

The returned variable value comes from whichever flow the interview is running. If the specified variable can’t be found in that flow, the method returns `null`.

This method checks for the existence of the variable at run time only, not at compile time.

Deploy a Flow to Other Organizations

Flows created in the Cloud Flow Designer can be included in change sets and packages. The recipient organization of either the change set or package must have Visual Workflow enabled.

IN THIS SECTION:

[Considerations for Deploying Flows with Change Sets](#)

Before you use change sets to deploy a flow, understand the limits and unexpected behaviors that are related to component dependencies, deployment, and flow triggers.

[Considerations for Deploying Flows with Packages](#)

Flows can be included in both managed and unmanaged packages. Before you deploy one, understand the limitations and behaviors of packages that contain flows.

EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Considerations for Deploying Flows with Change Sets

Before you use change sets to deploy a flow, understand the limits and unexpected behaviors that are related to component dependencies, deployment, and flow triggers.

Component Dependencies

- If you plan to deploy a flow with change sets, consider limitations in migration support. Make sure your flows reference only fields and components that are available in change sets.
- When you view the dependent components for the change set, the Component Dependencies page lists the dependencies for *all* versions of the flow. Add all interdependent components for the relevant flow version to the outbound change set.
- If a component is referenced by the following flow elements, the Component Dependencies page doesn't display that component. To deploy the flow successfully, manually add those referenced components to the change set.
 - Apex
 - Email Alerts
 - Post to Chatter
 - Quick Actions
 - Send Email
 - Submit for Approval

For example, if you use an email alert, manually add the email template that is used by that email alert.

Deployment

- You can include only one version of a flow in a change set.
- An active flow in a change set is deployed to its destination as inactive. Activate the flow manually after deployment.
- If the flow has no active version when you upload the outbound change set, the latest inactive version is used.
- Deploying or redeploying a flow with change sets creates a version of the flow in the destination organization.

Flow Triggers

Flow triggers aren't available in change sets.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

The Process Builder has superseded flow trigger workflow actions, formerly available in a pilot program. Organizations that are using flow trigger workflow actions can continue to create and edit them, but flow trigger workflow actions aren't available for new organizations.

Considerations for Deploying Flows with Packages

Flows can be included in both managed and unmanaged packages. Before you deploy one, understand the limitations and behaviors of packages that contain flows.

Component Dependencies

- If you plan to deploy a flow with packages, consider limitations in migration support. Make sure your flows reference only packageable components and fields.
- Referential integrity works the same for flows as it does for other packaged elements.
- If any of the following elements are used in a flow, packageable components that they reference aren't included in the package automatically. To deploy the package successfully, manually add those referenced components to the package.
 - Apex
 - Email Alerts
 - Post to Chatter
 - Quick Actions
 - Send Email
 - Submit for Approval

For example, if you use an email alert, manually add the email template that is used by that email alert.

Flow Status

You can package only active flows. The active version of the flow is determined when you upload a package version. If none of the flow's versions are active, the upload fails.

Updating Packages

- To update a managed package with a different flow version, activate that version and upload the package again. You don't need to add the newly activated version to the package. However, if you activate a flow version by mistake and upload the package, you'll distribute that flow version to everyone. Be sure to verify which version you really want to upload.
- You can't include flows in package patches.

Other Limitations

- If you register your namespace after you referenced a flow in a Visualforce page or Apex code, don't forget to add the namespace to the flow name. Otherwise, the package will fail to install.
- If someone installs a flow from a managed package, error emails for that flow's interviews don't include any details about the individual flow elements. The email is sent to the user who installed the flow.
- Flow triggers aren't packageable.

The Process Builder has superseded flow trigger workflow actions, formerly available in a pilot program. Organizations that are using flow trigger workflow actions can continue to create and edit them, but flow trigger workflow actions aren't available for new organizations.

EDITIONS

Available in: Salesforce Classic

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

- In a development organization, you can't delete a flow or flow version after you upload it to a released or beta managed package.

SEE ALSO:

[Considerations for Installed Flows](#)

CHAPTER 6 Why Did My Flow Interview Fail?

To troubleshoot a failed flow interview, use the flow fault email. You can also set up temporary Screen or Send Email elements to identify the problem.

IN THIS SECTION:

[Emails About Flow Errors](#)

Every time a flow interview fails, the admin who created the associated flow gets an email. The email includes the error message from the failure and details about every flow element that the interview executed.

[Limitations of Emails About Flow Errors \(Beta\)](#)

The email about errors in flow interviews has some limitations for Screen, Lookup, Create, and Subflow elements—as well as some general limitations.

[Add Temporary Elements to a Flow](#)

Add Screen or Send Email elements to the flow so you can check what the resources' values are at any given time. Once you've solved the problem, delete temporary Screen elements.

[Troubleshoot Flow URLs](#)

If you're distributing a flow and the custom button, custom link, or a direct flow URL isn't working as expected, verify the referenced flow. In addition, verify its variables if you're passing values into a flow from the URL.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

Emails About Flow Errors

Every time a flow interview fails, the admin who created the associated flow gets an email. The email includes the error message from the failure and details about every flow element that the interview executed.

 **Note:** This release contains a beta version of the flow error email that is production quality but has [known limitations](#). You can provide feedback and suggestions for the flow error email on the [IdeaExchange](#).

If the interview failed at multiple elements, the admin receives multiple emails, and the final email includes an error message for each failure. If a flow uses fault connectors, its interviews can fail at multiple elements.

 **Example:**

```
An error occurred at element Apex_Plug_in_1.  
List index out of bounds: 0.
```

```
An error occurred at element Fast_Delete_1.  
DELETE --- There is nothing in Salesforce matching your delete
```

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

```
criteria.
```

```
An error occurred at element Email_Alert_1.
Missing required input parameter: SObjectRowId.
```

SEE ALSO:

[Limitations of Emails About Flow Errors \(Beta\)](#)

[Customize What Happens When a Flow Fails](#)

[Why Did My Flow Interview Fail?](#)

Limitations of Emails About Flow Errors (Beta)

The email about errors in flow interviews has some limitations for Screen, Lookup, Create, and Subflow elements—as well as some general limitations.

 **Note:** This release contains a beta version of the flow error email that is production quality but has known limitations. You can provide feedback and suggestions for the flow error email on the [IdeaExchange](#).

General

- If the user who started the flow doesn't have a first name, `null` replaces the user's first name in the "How the Interview Started" section.
- Variable assignments display in this pattern: `{!variable} (prior value) = field/variable (new value)`. If the variable had no prior value, the parentheses display as empty. For example: `{!varStatus} () = Status (Delivered)`
- If you install a flow from a managed package, error emails for that flow's interviews don't include any details about the individual flow elements. The email is sent to the user who installed the flow.

Screen elements

Password fields display in plain text, just like if you reference a password field in a Display Text field.

Lookup elements

The email displays lookup elements as "query" elements. Record Lookup displays as Record Query, and Fast Lookup displays as Fast Query.

Create elements

- If you don't assign the created record's ID to a specific variable, the email displays the following line in the Result section of Record Create and Fast Create elements.

```
{!null} = null
```

Subflow elements

- The merge field annotation (`{!variable}` as opposed to just `variable`) is missing for variables in a referenced flow. For example, when an interview enters a subflow and gives details about the inputs, the subflow's variable is `subVariable` instead of `{!subVariable}`.
- If the error occurs in a referenced flow, the email gets sent to the author of the master flow, but the subject references the name of the referenced flow.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

- If you see multiple “Entered flow *ReferencedFlowName* version *ReferencedFlowVersion*” messages with no “Exited *ReferencedFlowName* version *ReferencedFlowVersion*” messages in between them, the flow user navigated backwards. To prevent this scenario, adjust the navigation options in the first screen of the referenced flow so that the user can’t click **Previous**.

SEE ALSO:

[Emails About Flow Errors](#)

[Why Did My Flow Interview Fail?](#)

Add Temporary Elements to a Flow

Add Screen or Send Email elements to the flow so you can check what the resources’ values are at any given time. Once you’ve solved the problem, delete temporary Screen elements.

1. Create a single text template that contains the values of all resources and the fault message.
2. For each fault path, use the text template to configure one of the following elements.
 - A Screen element that uses the text template in a Display Text Field. (Only if the flow’s type supports Screen elements.)
 - A Send Email element that uses the text template as the body and your email as the recipient.
 - A Post to Chatter element that uses the text template as the message. Consider creating a Chatter group specifically for flow errors.
3. Test the flow.



Example: Here’s a text template for the Calculate Discounts on Opportunities flow in the Cloud Flow Designer Workbook.

```
RESOURCE VALUES for "Calculate Discounts on Opportunities"
opptyID: {!opptyID}
AccountID: {!AccountID}
AccountRevenue: {!AccountRevenue}
Full_Discount outcome: {!Full_Discount}
Partial_Discount outcome: {!Partial_Discount}
Discount: {!Discount}

ERROR
{!$Flow.FaultMessage}
```

After each element in the flow, add a temporary Post to Chatter element. Each Post to Chatter element is configured to use:

- The text template as the post’s message
- The “Flow Troubleshooting” Chatter group as the post’s target

Configure the Record Lookup and Record Update elements’ fault connectors so that they route to the Post to Chatter elements.

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

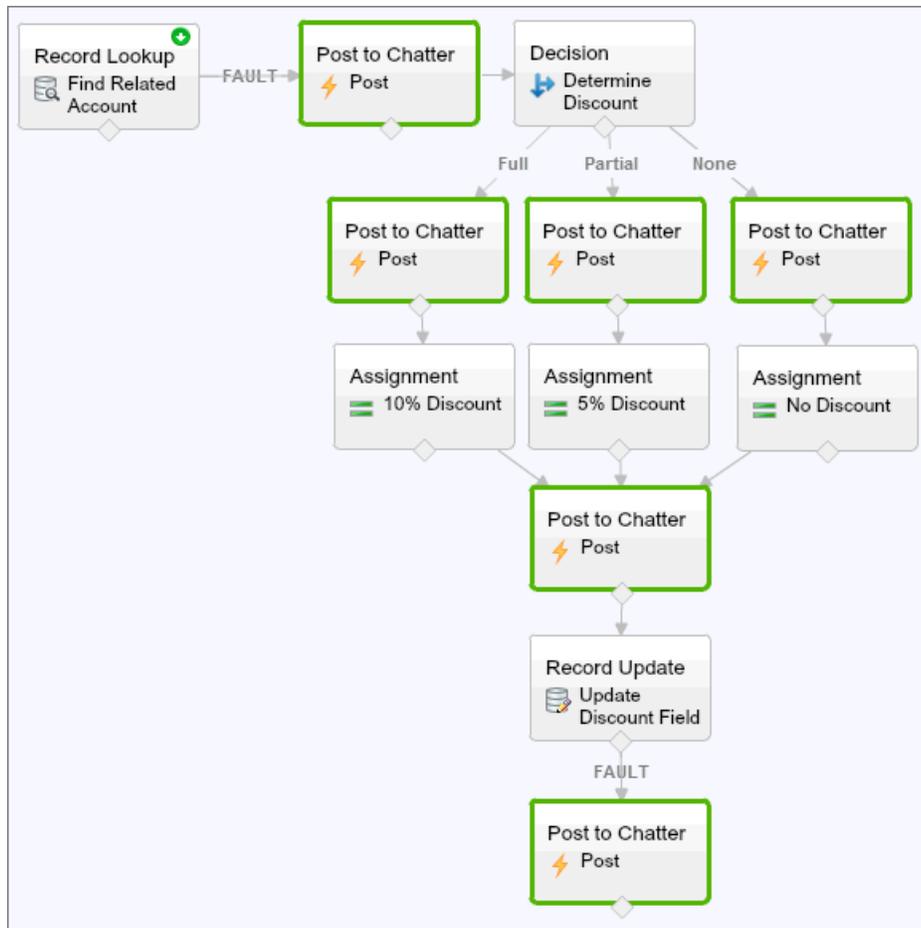
Available in:

- Enterprise
- Performance
- Unlimited
- Developer

USER PERMISSIONS

To open, edit, or create a flow in the Cloud Flow Designer:

- “Manage Force.com Flow”



This way, the flow posts to the Chatter group after the Record Lookup, Decision, Assignment, and Record Update elements are executed. Each post provides insight into the values of each resource throughout the flow. If the flow fails, the error is included in the Chatter posts.

After you identify and fix the problem with the flow, remove the temporary elements.

SEE ALSO:

[Why Did My Flow Interview Fail?](#)

Troubleshoot Flow URLs

If you're distributing a flow and the custom button, custom link, or a direct flow URL isn't working as expected, verify the referenced flow. In addition, verify its variables if you're passing values into a flow from the URL.

To make sure that the URL can find the right flow, verify that:

- The flow that the URL references hasn't been deleted or deactivated.
- The flow name is spelled and capitalized correctly. It must be an exact, case-sensitive match to the flow's `Unique Name`.

If your flow URL references a specific flow version, verify that the version hasn't been deleted or deactivated.

If you're using the URL to pass values into the flow and the URL can't access the variable, the parameter that references the variable is ignored.

To make sure that the URL can find the right flow variable, verify that each variable you're trying to pass values into:

- Is spelled and capitalized correctly. It must be an exact, case-sensitive match to the variable.
- Allows input access. The variable's `Input/Output Type` must be set to "Input Only" or "Input and Output."
- Hasn't been renamed in the flow.
- Hasn't been removed from the flow.
- Isn't an `sObject` variable or an `sObject` collection variable.

In addition, make sure the value that you're trying to pass into the variable is compatible with the variable's data type and is correctly formatted.

SEE ALSO:

[Set Flow Finish Behavior with a Flow URL](#)

[Set Flow Variables from a Flow URL](#)

[Why Did My Flow Interview Fail?](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

CHAPTER 7 Visual Workflow Terminology

The following terminology is used for Visual Workflow in Salesforce:

Cloud Flow Designer

Cloud-based application that lets administrators create a flow for use in Salesforce.

Connector

Connectors determine the available paths that a flow can take at run time.

Element

Each *element* represents an action that the flow can execute. Examples of such actions include reading or writing Salesforce data, displaying information and collecting data from flow users, executing business logic, or manipulating data.

Flow

A *flow* is an application that can execute logic, interact with the Salesforce database, call Apex classes, and collect data from users. You can build flows by using the Cloud Flow Designer.

Flow Interview

A *flow interview* is a running instance of a flow.

Master Flow

A master flow is a flow that contains a subflow element. The term “master” is used to distinguish it from the flow that is referenced and called by the subflow element.

Resource

Each *resource* represents a value that you can reference throughout the flow.

Subflow

A subflow element references another flow, which it calls at run time. The flow that contains the subflow element is referred to as the master flow.

SEE ALSO:

[Cloud Flow Designer](#)

[Visual Workflow](#)

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in:

- Enterprise
- Performance
- Unlimited
- Developer

INDEX

<flow:interview>
usage 138, 141

A

Absolute Alarm Event
example 124
Alarm events
absolute time 111
relative time 112
Apex
call from a flow 33
Apex Plug-in element 46
Approvals
submit from a flow 68
Assignment element
adding 47
configuring 47
operators 92

C

Call Apex element 48
Chatter
post from a flow 60
Choice 75
Cloud Flow Designer
overview 24
system requirements 24
Collection
example 120, 125
Collection variable
example 119
populate with values 37
Conditions
flow 32
Constant 78
Create a Flow 28
Cross-object references
in flows 89

D

Decision element
adding 49
configuring 49
Dynamic Record Choice 78

E

Elements
Apex plug-in 46
assignment 47
Call Apex 48
decision 49
email alert 50
fast create 51
fast delete 51
fast lookup 52
fast update 54
fault connector 39
fault connector, best practice 40, 42
fault connector, default behavior 39
fault connector, examples 43
loop 54
Post to Chatter 60
quick actions 59
record create 55
record delete 56
record lookup 57
record update 58
screen 61–65
Send Email 66
step 67
subflow 46, 69
Submit for Approval 68
Email
send from flow 33, 66
Email Alert element 50
Event types, flow
absolute time alarm 111

F

Fast Create element 51
Fast Delete element 51
Fast Lookup element 52
Fast Update element 54
Fault Connector element
best practice 40, 42
default behavior 39
examples 43
flow
activating 130

Flow

- absolute time alarms 111
- accessibility 23
- administration considerations 20
- building blocks 2
- call Apex 33
- call email alert workflow action 50
- conditions 32
- connectors, types of 38, 91
- considerations 6
- considerations, Cloud Flow Designer 14
- considerations, large flows 15
- creating 28
- delete waiting interviews 131
- deleting 131
- delivering to users 133
- delivering to users, external 145
- delivering to users, internal 133, 137
- design considerations 13–15
- design considerations, formula 17
- editing properties 117, 128
- elements overview 44
- embedding in Visualforce pages 137, 145
- feature overview 1
- formula limitations 17
- global variables 81
- in change sets 153
- Invoke quick action 59
- launching from processes 146
- launching from workflow rules 147
- limits 6–7
- managing 127
- managing connectors 31
- managing elements 31
- managing resources 31
- modifying 129
- opening 129
- operators 91
- operators, assignment 92
- operators, conditions 97
- operators, record filter 105
- pause, enable 132
- process action 146
- reference cross-object field values 89
- relative time alarms 112
- resources overview 74
- run time considerations 22
- saving 29
- searching 26

Flow (*continued*)

- send email 33, 66
- setting start element 29
- settings 132
- sharing 133, 137, 145
- submit record for approval 68
- testing 129
- time-based 18
- time-based considerations 18
- troubleshooting 156, 158
- troubleshooting, emails 156–157
- type 116
- wait 71
- wait event types 110
- wait, waiting conditions 73
- workflow action 147
- workflow action considerations 147

Flow collection values

- getting 141
- setting 138

Flow condition

- operators 97

Flow connectors

- adding 31
- editing 31
- removing 31

Flow constant values

- getting 141
- setting 138

Flow Designer

- user interface 25

Flow elements

- adding 31
- editing 31
- removing 31

Flow event types

- absolute time alarm 111

Flow examples

- absolute alarm event 124
- loop through a collection 120, 125
- populate a String collection variable 119
- relative alarm event 120, 123
- wait for many events, all 120
- wait for many events, any 123
- wait for one event 124

Flow finish location

- setting via URL 136

Flow formula resource

- create 80

Flow formula resource (*continued*)
limitations 17

Flow interviews
delete 131

Flow record filters
operators 105

Flow resources
adding 31
editing 31
formula, create 80
formula, limitations 17
removing 31

Flow screen
validate user input 31

Flow sObject variable values
getting 141
setting 138

Flow trigger
associated with workflow rule 150
considerations 147
defining 147
test mode 147

Flow URL
setting finish location 136
setting flow variable values 135
troubleshooting 160

Flow variable values
getting 141
setting 138
setting via URL 135

Flows in packages 153

G

Global actionQuick action
Invoke in flow 59

Global constants 80

Global variables
in flows 81

L

Limits
flow 6–7

Loop element
adding 54
configuring 54
example 120, 125

M

multi-select choice fields 17

O

Object-specific action
Invoke in flow 59

Operators
flow assignment element 92
flow condition 97
flow record filters 105

P

Palette, searching 27

Picklist Choice 83

Populate variable with values
collection variable 37

Post to Chatter element 60

Process Builder
differences from Visual Workflow 3
differences from Workflow 3

Q

Quick action element 59

R

Record Create element 55

Record Delete element 56

Record Lookup element 57

Record Update element 58

Relative Alarm Event
example 120, 123

Resources
choice 65, 75
Collection variable 77
constant 78
dynamic record choice 65, 78
global constants 80
picklist choice 65, 83
sObject collection 84
sObject variable 85
system variables 86
text template 87
variable 88
variable in referenced flow 36

S

Saving a flow 29

Screen
choice fields 65
choice resources 65

Screen element
about multi-select choice fields 17

Screen element (*continued*)

- adding [61](#)
- choice fields [64](#)
- configuring output fields on the Field Settings tab [65](#)
- configuring the Field Settings tab [63](#), [65](#)
- configuring the General Info tab [62](#)
- configuring user input fields on the Field Settings tab [63](#)
- editing [61](#)
- settings [62–63](#), [65](#)

Searching

- a flow [26](#)
- the Palette [27](#)

Send Email element [66](#)

SObject variable [85](#)

Step element [67](#)

Subflow element [46](#), [69](#)

Submit for Approval element [68](#)

System variables [86](#)

T

Test mode for flow triggers [147](#)

Text Template [87](#)

Troubleshooting

- flow URL [160](#)
- flows [156](#)
- flows, add temporary elements [158](#)
- flows, emails about errors [156–157](#)
- flows, fault email [156–157](#)

V

Variable [88](#)

Variable in referenced flow [36](#)

Visual Workflow

- administration considerations [20](#)
- considerations [6](#)

Visual Workflow (*continued*)

- considerations, Cloud Flow Designer [14](#)
- considerations, large flows [15](#)
- design considerations [13–15](#)
- design considerations, formulas [17](#)
- design considerations, time-based flows [18](#)
- differences from Process Builder [3](#)
- differences from Workflow [3](#), [5](#)
- feature overview [1](#)
- formula limitations [17](#)
- run time considerations [22](#)

Visualforce

- embedding flows [137](#), [145](#)
- getting flow variable values [141](#)
- setting flow variable values [138](#)

W

Wait element

- example [120](#), [123–124](#)

Wait event types

- flow [110](#)

Wait events

- relative time [112](#)

Wait in a flow

- configure [71](#)
- event types [110](#)
- waiting conditions [73](#)

Waiting conditions

- flow [73](#)

Workflow

- differences from Process Builder [3](#)
- differences from Visual Workflow [3](#), [5](#)
- flow trigger considerations [147](#)
- flow triggers [147](#)