Lightning Flow for Service Developer Guide

Salesforce, Spring '24

Guide your users with a list of actions

Last updated: March 29, 2024

CONTENTS

SALESFORCE FLOW FOR SERVICE

Give your users a list of logical next steps with Salesforce Flow for Service and the Actions & Recommendations component. To create the list, associate actions with a record page using an Actions & Recommendations deployment, Salesforce automation tools, or API. You can configure default actions for specific channels, like phone or chat, and select the actions that you want users to complete first and last.

Specify which actions to show in the component on your Lightning pages. When you set up a deployment or use an API, you can also display the top recommendations that result from your Einstein Next Best Action strategies.

The component shows a list of RecordAction junction objects. A RecordAction associates an action, such as a screen flow, a field service mobile flow, an autolaunched flow, or a quick action, with the parent record. A RecordAction is also created when a user accepts a Next Best Action recommendation; then the RecordAction associates the flow in the recommendation with the record.

When the user clicks a step in the list, the associated action in the RecordAction object launches. You can also set up the first action to auto-launch when the record page opens. If the action is a screen flow, for example, it starts in a subtab of a console app or in a window for a standard navigation app. When the user confirms the start of an autolaunched flow, it runs in the background. Quick actions open in a window.

EDITIONS

Available in: Lightning Experience

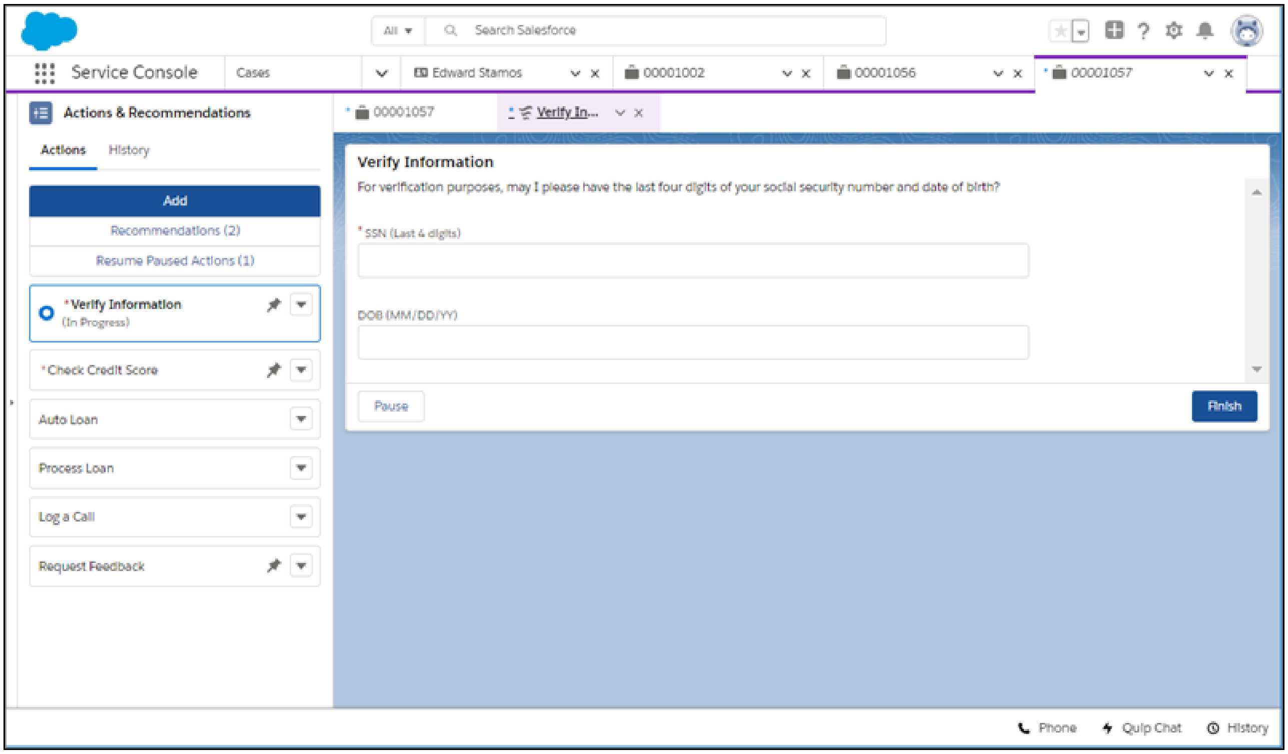
Available in: **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Lightning console apps are available for an extra cost to users with Salesforce Platform user licenses for certain products. Some restrictions apply. For pricing details, contact your Salesforce account executive.

The Actions & Recommendations component helps your users:

- Identify which steps to complete for a specific record and in which order
- Consider customized actions and offers that result from an Einstein Next Best Action strategy, such as a discount, a repair, or an add-on service
- Restart flows that users have paused, and view stages in an active flow if stages are defined
- Identify and complete flows that are mandatory
- Find and start another action from a subset that you configure
- Understand the history of actions taken on a record, including when each action was started, paused, resumed, and completed and by whom

Here's an example of Salesforce Flow for Service set up in the Service Console app. The flow in the subtab helps agents verify the identity of an incoming caller.



Verify Information

For verification purposes, may I please have the last four digits of your social security number and date of birth?

Before you add the component to your Lightning pages, first set up the flows and quick actions that you want to show. If you want to include recommendations from Next Best Action strategies, configure them first as well.

Then create an Actions & Recommendations deployment. A deployment captures settings that you can reuse on multiple pages. Place the component on your Lightning pages, and select the deployment in component properties.

Tip: Learn how to put the Actions & Recommendations component to work for your agents. The Salesforce Flow for Service module on Trailhead can help you get started.

Never heard of flows and process automation? Many of the tasks you assign, the emails you send, and other record updates are vital parts of your standard business processes. Instead of doing this repetitive work manually, you can configure flows and processes to do it automatically. To learn more, check out Automate Your Business Processes in Salesforce Help.

Lightning Flow for Service Considerations

Learn about how packaging, change sets, and the sharing model can impact your Lightning Flow for Service implementation.

SEE ALSO:

Trailhead module: Lightning Flow for Service

Supported Apps, Channels, Actions, and Objects in Lightning Flow for Service

Lightning Flow for Service is supported in Lightning console and standard navigation apps. You can set it up to work with Open CTI for phone integration, including support for unknown callers, and Chat in Lightning Experience for chat integration.

The component can include these types of actions.

- Active screen flows, field service mobile flows, and autolaunched flows

  Note: Autolaunched flows run in the background without any user input. You can design an autolaunched flow to pause for a time interval or until a condition exists. When an autolaunched flow pauses, we show a message that the flow completed. When the flow resumes, however, it still has work to do.

- Quick actions that are available in the record page layout
- Recommendations that result from applying Next Best Action strategies

We support the Actions & Recommendations component on most Lightning pages, including custom Lightning pages. Custom sharing rules limit support for the component on a few Lightning pages. We don’t support the component on these pages, for example.

- ContentDocuments
- Events
- Knowledge
- Notes
- Scorecard Associations
- Scorecard Metrics
- Tasks

We haven’t validated the component with these objects.

- AiDataset
- AiVisionModel
- CustomPersonAccountChild__p
- CustomPersonChild__p
- CustomPerson__p
- LiveAgentSession
- LiveChatVisitor
- OpportunityLineItem
- OpportunityLineItemSchedule
- OrderItem
- OrderItemTaxLineItem

- ProcessInstanceStep
- ProcessInstanceWorkitem
- ServiceResourceCapacity
- Shift

SEE ALSO:

Salesforce Help: Salesforce Console in Lightning Experience

Salesforce Help: Salesforce Call Center

Salesforce Help: Chat

Lightning Flow for Service Example Use Case

Lightning Flow for Service can help your agents follow consistent procedures when a customer calls or a support issue comes in. You can associate actions with a new record, such as a case or contact record, and show agents a to-do list for the record page.

Let's look at a fictional Service Cloud customer. Awesome Bank employs 20 agents who handle loan applications. Typically, agents get calls from potential customers applying for a new loan. Agents also take calls from customers that have started the application process online on the bank's Experience Cloud site.

When a customer's call is routed to the appropriate agent based on the loan type, the agent completes the loan application in the following way.

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

Meet Cyrus, the service team leader. He's in charge of the customer service department and is looking at ways to improve agent efficiency. He wants to streamline the following.

- Common steps that are applicable to all loan types
- Unique steps specific to the loan type
- A standardized way for agents to complete steps that have been started before, such as when a customer starts an application online and later calls to complete it

In addition, Cyrus wants agents to suggest extra products and services to qualified customers. He approaches Maria, the service admin in charge of Salesforce applications for Awesome Bank. With Lightning Flow for Service, Maria can provide Awesome Bank agents:

- A method of presenting agents with recommendations, such as a next step or customized offer
- A dynamic set of flows and quick actions associated with the record so that agents can see which steps to complete
- A simple way for agents to resume paused flows for a record, such as flows that customers have started on an Experience Cloud site page and then paused
- An easy way for agents to find another step based on customer needs
- A means of seeing which actions have been started and completed on a record
- A reminder for agents to complete screen flows that are required, like the credit score check

After Maria creates flows and quick actions, she can choose from several methods to set up Lightning Flow for Service. All the methods create RecordActions so that Maria can present a list of steps to agents.

- Associate Actions to Records with a Deployment
- Associate Actions to Records with Process Builder
- Associate Actions to Records with SOAP
- Associate Actions to Records with Apex

Maria decides to configure an Actions & Recommendations deployment in Setup. A deployment lets her set up the component from the user interface rather than using code. She can specify which channel-specific actions appear on which record pages, and give her agents step-by-step guidance. Best of all, she can display special offers that result from applying Next Best Action strategies to a set of recommendations.

Note: To show recommendations from Next Best Action strategies, use a deployment or API. Process Builder lets you show flows and quick actions on record pages when there's a trigger condition.

SEE ALSO:

Implementing the Example Use Case

Trailhead module: Lightning Flow for Service

Implementing the Example Use Case

You can configure the Actions & Recommendations component in several ways. Creating a deployment in Setup is an easy way to create RecordActions that appear in the list.

Maria, the admin at Awesome Bank, is ready to set up Lightning Flow for Service for her agents. She wants to configure actions as channel defaults so that agents see the loan application steps on a contact or case page. In addition, she wants to integrate Lightning Flow for Service with Awesome Bank's Open CTI implementation. That way, agents can quickly create a contact record when there's an unknown caller.

Maria completes the following tasks.

1. Create flows in Flow Builder.
   - To handle unknown callers, Maria builds a flow called Create Contact that walks agents through creating a contact record.
   - To guide agents and portal customers through the loan application, she creates a flow called New Loan.
   - To determine a customer's credit score, she creates a flow called Check Credit Score.
   - To let agents submit a loan application, she builds an autolaunched flow called Process Loan.
   - To walk agents through the wrap-up steps, she creates a flow called Wrap Up Loan.
2. Update the Screen Pop Settings for the softphone layout in Setup (in Lightning Experience).

   To handle unknown callers, Maria updates the No Matching Records setting to pop to the unknown caller flow, Create Contact. This setting ensures that when an agent accepts a call from an unknown caller, the agent is presented with a flow that creates a contact record.
3. Create an Actions & Recommendations deployment in Setup.

   a. From Setup, in the Quick Find box, enter `Actions & Recommendations`, and select **Actions & Recommendations**.

   b. Click **New Deployment**. Name your deployment.

c. Select at least one type of guidance. Select **Flows and quick actions**, or to display actions and offers that result from Next Best Action strategies, select **Recommendations** .

   Maria selects **Flows and quick actions**. After she gets the component to show the right steps, she can come back, edit the deployment, and configure settings to show recommendations too.

d. Select objects to use for object-specific quick actions and Next Best Action strategies.

   Maria adds the Case and Contact objects. That way, she can show agents object-specific quick actions, such as Log a Call.

   Note: To use object-specific quick actions in deployment settings, add them to the record page layout.

e. Configure channel defaults.

   On each channel, select the actions to show as defaults. For example, Maria wants to configure the flows defined in Step 1 as channel defaults. She drags those flows to the preview pane, and adds the Log a Call quick action too. She assigns attributes to indicate which actions users can remove at run time, and which are mandatory, such as the Check Credit Score flow.

   Note: Agents see the channel defaults when no other RecordActions are defined for the record page when it opens in a channel. If you create RecordActions using Process Builder or APIs, your users don't see the actions that you configure as channel defaults.

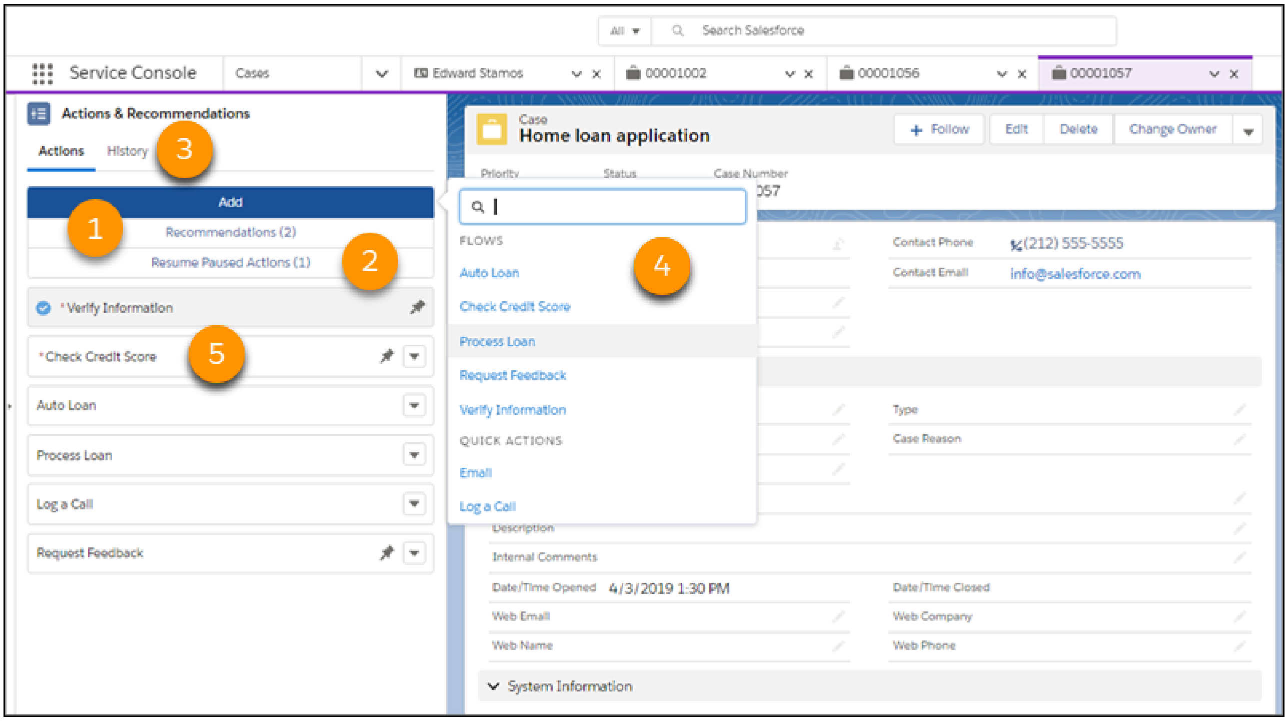
f. Define which actions are available for users to start as needed. At run time, an agent can click **Add** and select an action from this subset.

4. Edit the Lightning record page, and add the Actions & Recommendations component.

   To display a list of actions associated with the contact and case records, Maria adds the component to those pages. In component properties, she selects her deployment.

The Agent Experience

The component gives the loan agents at Awesome Bank a clear set of steps to follow when they speak to customers. Under Recommendations (1), they see offers or actions from a Next Best Action strategy when the deployment is configured to show them. When the record page has a paused flow, it's listed in under Resume Paused Actions (2). If there's a handoff between agents, an agent can use the History tab (3) to learn which steps in the loan process have been started or completed. If agents don't see a step, they can click Add and find a different action (4) to run. And agents see an asterisk next to mandatory actions that are important to complete (5).



Case: Home loan application

Contact Phone: (212) 555-5555

Contact Email: info@salesforce.com

Date/Time Opened: 4/3/2019 1:30 PM

Example Customer Scenarios

Yolanda is a business owner who is hoping to expand and open a new location. She's looking for a small business loan to jump-start the new venture, so she calls Awesome Bank. Yolanda has never done business with the bank before, so her phone number isn't recognized. Because Maria configured settings to pop to the Create Contact flow for unknown callers, the agent that takes Yolanda's call sees the flow and completes a new contact record. The agent also sees other steps to complete for the loan application because Maria configured default actions for the Phone channel. One of the other steps is the mandatory step to check Yolanda's credit score.

Erika is buying a new car. She heads to Awesome Bank's website and starts an application for an auto loan. Midway through, she realizes that she doesn't have the required vehicle information. She pauses the application. Later that day, Erika finds the information she needs and calls to finish the application. Because the paused flow is associated with Erika's contact record, when the agent takes the call, the paused flow appears on the Actions & Recommendations component on Erika's contact page. The agent resumes the flow, enters the missing information, and completes the application, picking up right where Erika left off.

SEE ALSO:

Associate Actions to Records with a Deployment

Customize Your Lightning Pages with the Component

Enhance the User Experience

The Actions & Recommendations component gives your agents a clear set of steps to follow. Help your agents be more productive by fine-tuning how they use the list.

Show Users the Top Recommendations

You can show the top recommendations from your Einstein Next Best Action strategies in the Actions & Recommendations component. To display recommendations, configure a deployment in Setup or programmatically with the metadata type RecordActionDeployment.

Let Users Resume Paused Flows from the Actions & Recommendations Component

When you configure Process Automation Settings, you can allow users to pause flows. Show agents paused flows associated with the current record page in the Actions & Recommendations component. When there's a handoff or a customer calls back, the agent can easily find and resume the paused flow. The component shows all paused flows associated with the current record, including flows not started from the list.

Show Users Which Steps to Complete First or Last

Pin actions to the top or bottom of the Actions & Recommendations component so that users know to complete them first or last.

Remind Users to Complete Mandatory Steps

Highlight required steps by configuring them as mandatory actions. When agents try to close a flow that's mandatory, they see a reminder that the step is required.

Keep Steps Visible on Your List

Hide the remove option for actions that you want agents to complete. Agents can't remove these steps, so they remain on the list unless they're completed.

Find Another Action

Sometimes a customer interaction requires a step that doesn't appear in the Actions & Recommendations component. When an agent clicks Add, they can search for an action and start it. You can help users narrow their search by configuring a subset of actions.

View the Action History

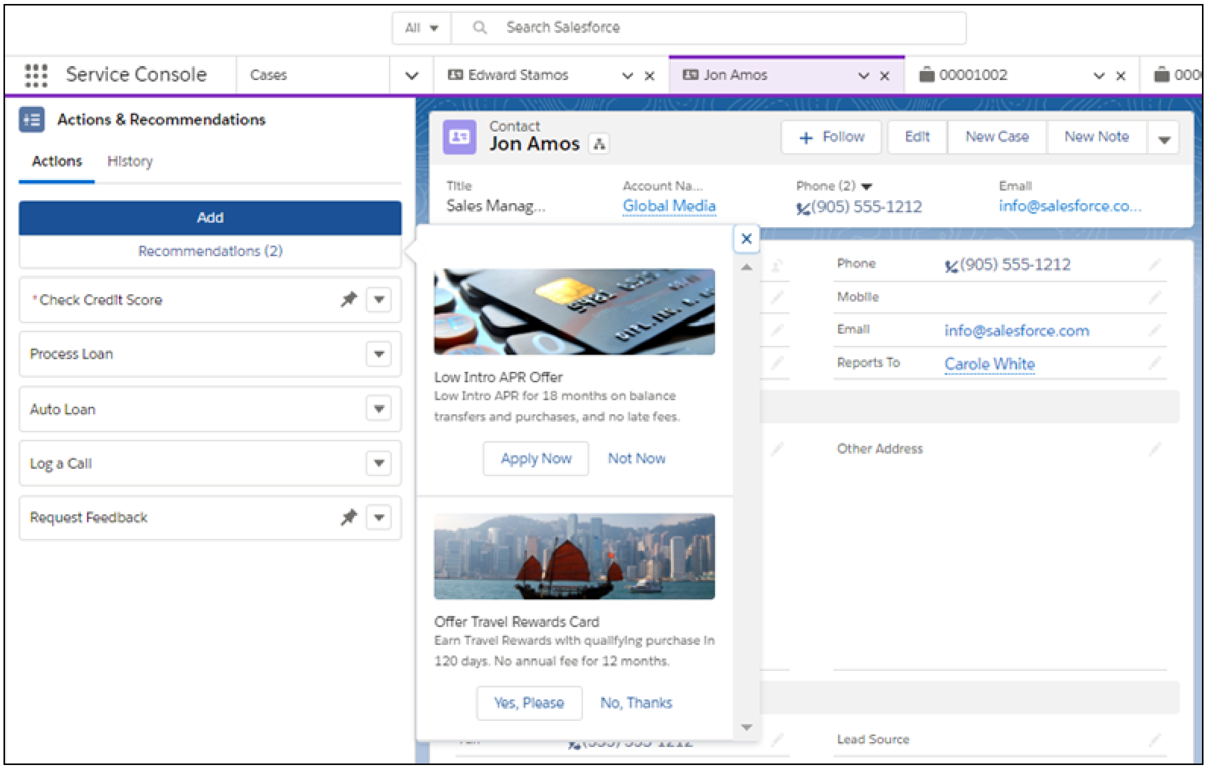
See which actions were launched, by which agents, and when in the History tab on the Actions & Recommendations component. The History tab also shows the state, or status, for each action, so you can see when an action was started, paused, resumed, and completed. You also can access the action history for a record programmatically using the RecordActionHistory object.

Show Users the Top Recommendations

You can show the top recommendations from your Einstein Next Best Action strategies in the Actions & Recommendations component. To display recommendations, configure a deployment in Setup or programmatically with the metadata type RecordActionDeployment.

For example, Awesome Bank wants to present credit card offers to customers that have good credit scores. First, Maria creates flows that can walk agents or customers through the card application process. Maria configures those flows as Next Best Action recommendations. To filter the right offers and present them to the right customers, Maria sets up an action strategy.

In an Actions & Recommendations deployment, Maria configures the component to show recommendations. She selects strategies that the deployment uses, and configures how the recommendations appear.



Title: Sales Manag...
Account Na...: Global Media
Phone (2): (905) 555-1212
Email: info@salesforce.co...

Phone: (905) 555-1212
Mobile:
Email: info@salesforce.com
Reports To: Carole White

Low Intro APR Offer
Low Intro APR for 18 months on balance transfers and purchases, and no late fees.

Offer Travel Rewards Card
Earn Travel Rewards with qualifying purchase in 120 days. No annual fee for 12 months.

When a customer qualifies, the agent clicks **Recommendations** to see the offers. When a recommendation is accepted, the associated flow opens.

Tip: In your recommendation, keep the labels for the accept and reject buttons to fewer than 10 characters. Otherwise, the buttons don't appear side by side.

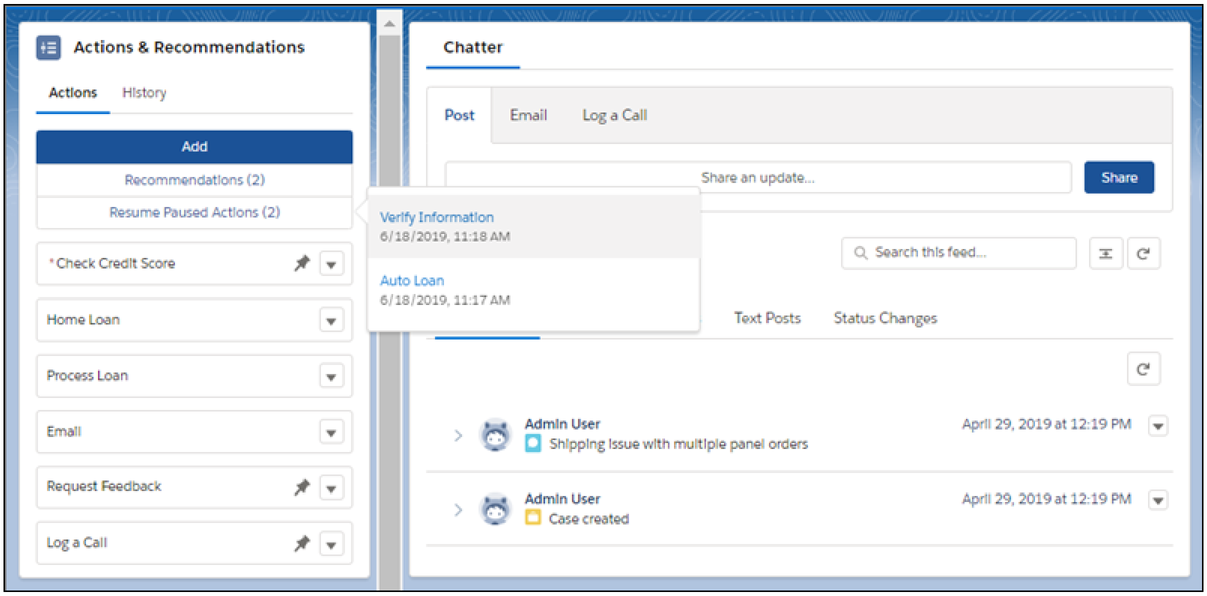
SEE ALSO:

Salesforce Help: Einstein Next Best Action

Let Users Resume Paused Flows from the Actions & Recommendations Component

When you configure Process Automation Settings, you can allow users to pause flows. Show agents paused flows associated with the current record page in the Actions & Recommendations component. When there's a handoff or a customer calls back, the agent can easily find and resume the paused flow. The component shows all paused flows associated with the current record, including flows not started from the list.

For example, Erika is a customer at the fictitious Awesome Bank. Erika is completing an online auto loan application that uses a flow. She pauses the flow because she's missing some required information. She calls the bank later to complete the application. Because the current record variable in the flow is set to Erika's contact record, when her contact page opens, the agent sees the paused flow in the Actions & Recommendations component. To resume the flow, the agent clicks **Resume Paused Actions** and selects the flow.



When an agent resumes a flow, it opens, and the list updates to include it. If the flow was started from a pinned region of the list, it's added at the end of that region. Otherwise, it's added to the bottom of the unpinned region.

Note: A flow can use the variable `Flow.CurrentRecord` to track the current record associated with the flow. Sometimes API or flow logic updates this variable. For example, if a flow is associated with a lead record and the lead is converted to a contact, the record association is updated. When a user pauses a flow, the component checks the currently associated record. If the record context changed, the paused flow doesn't appear on the record page's list. Instead, to resume the flow, a message directs the user to the new record that is associated with the flow.

SEE ALSO:

Salesforce Help: Let Users Pause Flow Interviews

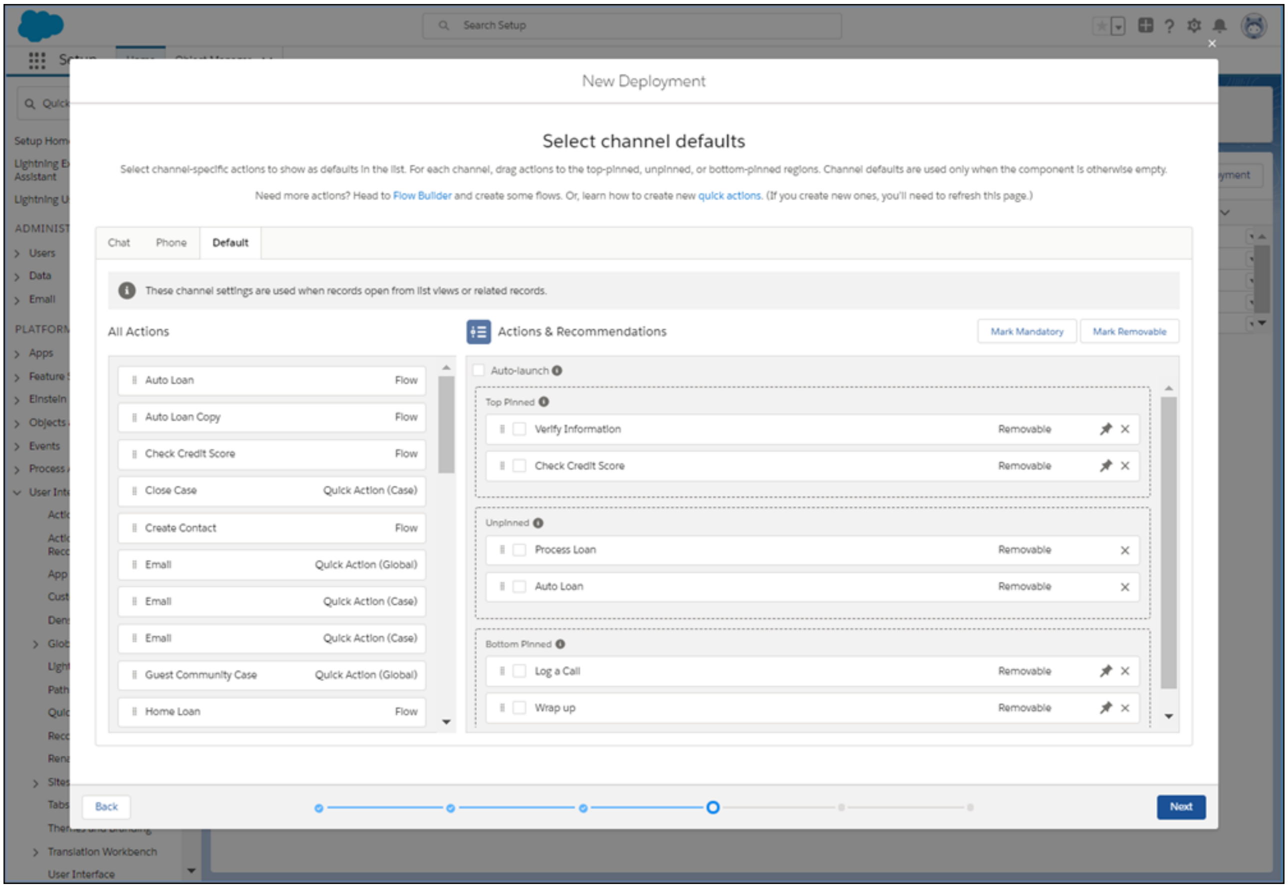
Salesforce Help: Add Record Context to Your Flows

Show Users Which Steps to Complete First or Last

Pin actions to the top or bottom of the Actions & Recommendations component so that users know to complete them first or last.

Maria, the Salesforce admin at Awesome Bank, can assign actions to the top, bottom, or unpinned regions of the component. The method by which she sets up RecordActions determines how she assigns an action to a region.

- When Maria configures channel defaults in a Actions & Recommendations deployment, she can select an action and drag it to a region in the preview area.



Select channel defaults

Select channel-specific actions to show as defaults in the list. For each channel, drag actions to the top-pinned, unpinned, or bottom-pinned regions. Channel defaults are used only when the component is otherwise empty.

Need more actions? Head to Flow Builder and create some flows. Or, learn how to create new quick actions. (If you create new ones, you'll need to refresh this page.)

These channel settings are used when records open from list views or related records.

All Actions

Auto Loan	Flow
Auto Loan Copy	Flow
Check Credit Score	Flow
Close Case	Quick Action (Case)
Create Contact	Flow
Email	Quick Action (Global)
Email	Quick Action (Case)
Email	Quick Action (Case)
Guest Community Case	Quick Action (Global)
Home Loan	Flow

Actions & Recommendations

□ Auto-launch

Top Pinned	
□ Verify Information	Removable
□ Check Credit Score	Removable
Unpinned	
□ Process Loan	Removable
□ Auto Loan	Removable
Bottom Pinned	
□ Log a Call	Removable
□ Wrap up	Removable

- If Maria uses Process Builder and creates RecordActions, she can assign the Top, Bottom, or None value to the RecordAction's Pinned attribute.
- If Maria uses an API to define RecordActions, she can set the Pinned attribute for the action.

Note: Each step in the component has a pulldown menu. The Move Up and Move Down menu options let users reorder actions, but only within a pinned or unpinned region.

Remind Users to Complete Mandatory Steps

Highlight required steps by configuring them as mandatory actions. When agents try to close a flow that's mandatory, they see a reminder that the step is required.

Maria, the Salesforce admin at Awesome Bank, wants to make sure that agents complete the Check Credit Score step. This step is required for every loan application. To help agents remember to complete this step, Maria defines this screen flow as a mandatory action.

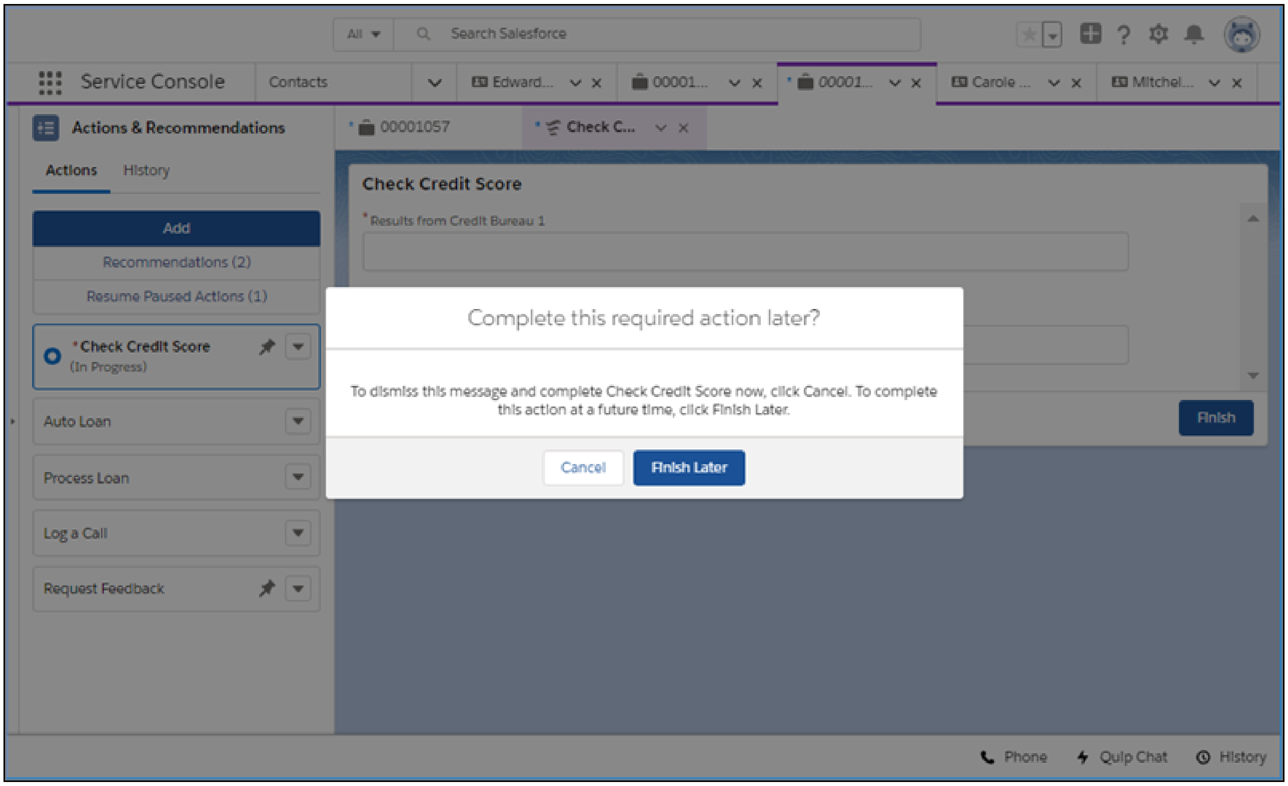
Note: The reminder appears for screen flows and field service mobile flows. We don't show the reminder for quick actions or autolaunched flows that are marked as mandatory.

Maria can set up an action as mandatory in several ways. Which method Maria uses depends on how she creates the RecordActions that display in the component.

- When Maria configures channel defaults in an Actions & Recommendations deployment, she can select an action in the preview area and mark it as mandatory.
- If Maria uses Process Builder to create RecordActions, she can set the Is Mandatory attribute to **True**.

- If Maria uses an API to define RecordActions, she can set the mandatory field for the action to **True**.

For example, when an agent tries to close a mandatory screen flow before completing it, a message reminds the agent that the flow is required. Clicking **Cancel** dismisses the warning and continues the flow. Or, the agent can click **Finish Later**, which closes the tab or window. The agent can start a new instance of the flow later.



Complete this required action later?

To dismiss this message and complete Check Credit Score now, click Cancel. To complete this action at a future time, click Finish Later.

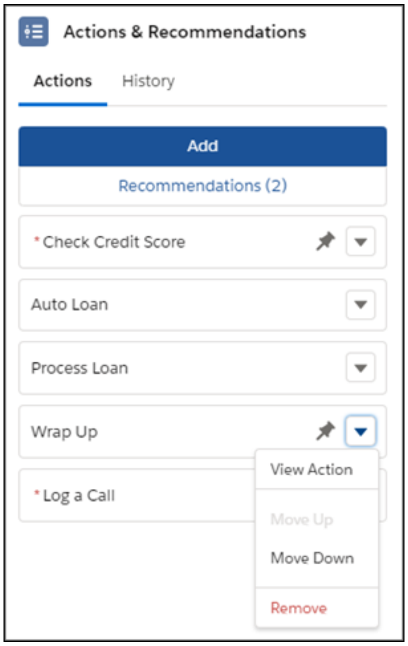
SEE ALSO:

Keep Steps Visible on Your List

Keep Steps Visible on Your List

Hide the remove option for actions that you want agents to complete. Agents can’t remove these steps, so they remain on the list unless they’re completed.

By default, steps on the Actions & Recommendations component are removable. However, if you choose, you can hide the remove option from users.



Maria, the Salesforce admin at Awesome Bank, wants to make sure that agents complete the Check Credit Score flow. In addition to marking the flow mandatory, she can hide the remove option in one of these ways.

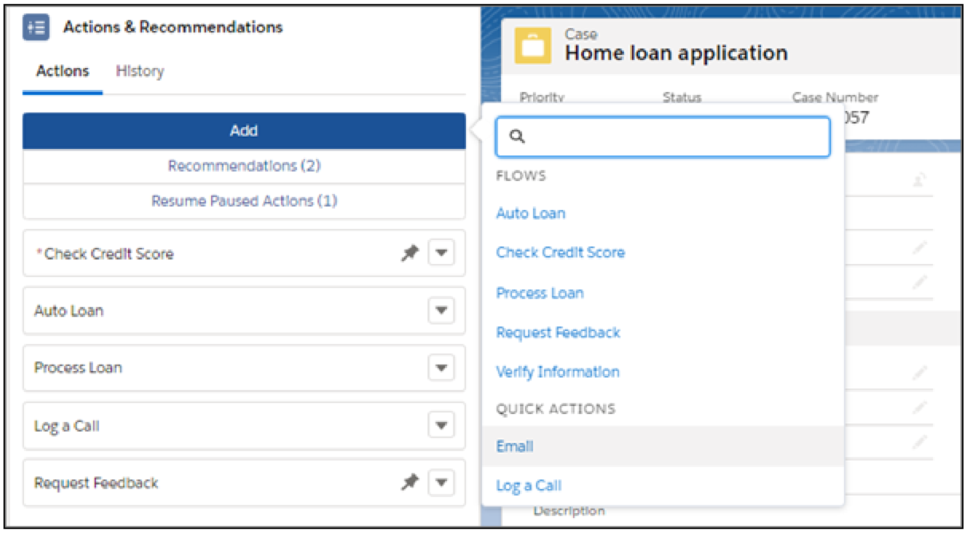
- When Maria configures channel defaults in a deployment, she selects the Check Credit Score flow in the preview area and marks it as not removable.
- If Maria uses Process Builder and creates RecordActions, she can set the Hide Remove Action in UI attribute in the RecordAction to **True**.
- If Maria uses an API to define RecordActions, she can set the attribute in the RecordAction.

Note: Even if you hide the remove option from users, actions can still be removed from the component using an API.

Find Another Action

Sometimes a customer interaction requires a step that doesn't appear in the Actions & Recommendations component. When an agent clicks Add, they can search for an action and start it. You can help users narrow their search by configuring a subset of actions.

For example, Maria, the Salesforce admin at Awesome Bank, wants her agents to see only the actions that they use for loan processing.



Maria configures the set of actions available to her agents.

- When Maria configures an Actions & Recommendations deployment in Setup, she selects which actions her agents see when they click Add.
- If Maria uses Metadata API to define a deployment, she can define which actions appear for her agents.

When a user adds an action, it starts, and is added to the list above the actions pinned at the bottom.

View the Action History

See which actions were launched, by which agents, and when in the History tab on the Actions & Recommendations component. The History tab also shows the state, or status, for each action, so you can see when an action was started, paused, resumed, and completed. You also can access the action history for a record programmatically using the RecordActionHistory object.

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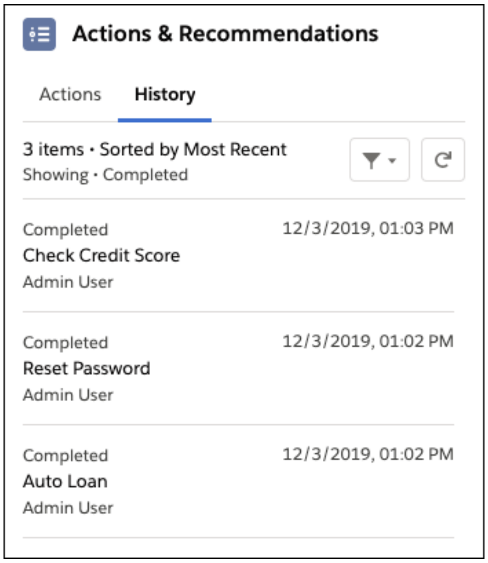
Use the Component’s History to Understand Status

The History tab lists state changes for actions associated with the record. It helps agents and supervisors grasp status so that they can quickly decide what to do next. For example, in a handoff or escalation, an agent or supervisor can review the history to identify gaps and determine the next step.

Here’s an example. The History tab lists the most recent 20 state changes, sorted with the most recently logged events listed first. Click **View More** to see the next 20 state changes in the log. Users can filter the list to see actions by status. The filter only applies to the last 200 actions.



Actions & Recommendations

Actions History

3 items • Sorted by Most Recent
Showing • Completed

Completed
Check Credit Score
Admin User
12/3/2019, 01:03 PM

Completed
Reset Password
Admin User
12/3/2019, 01:02 PM

Completed
Auto Loan
Admin User
12/3/2019, 01:02 PM

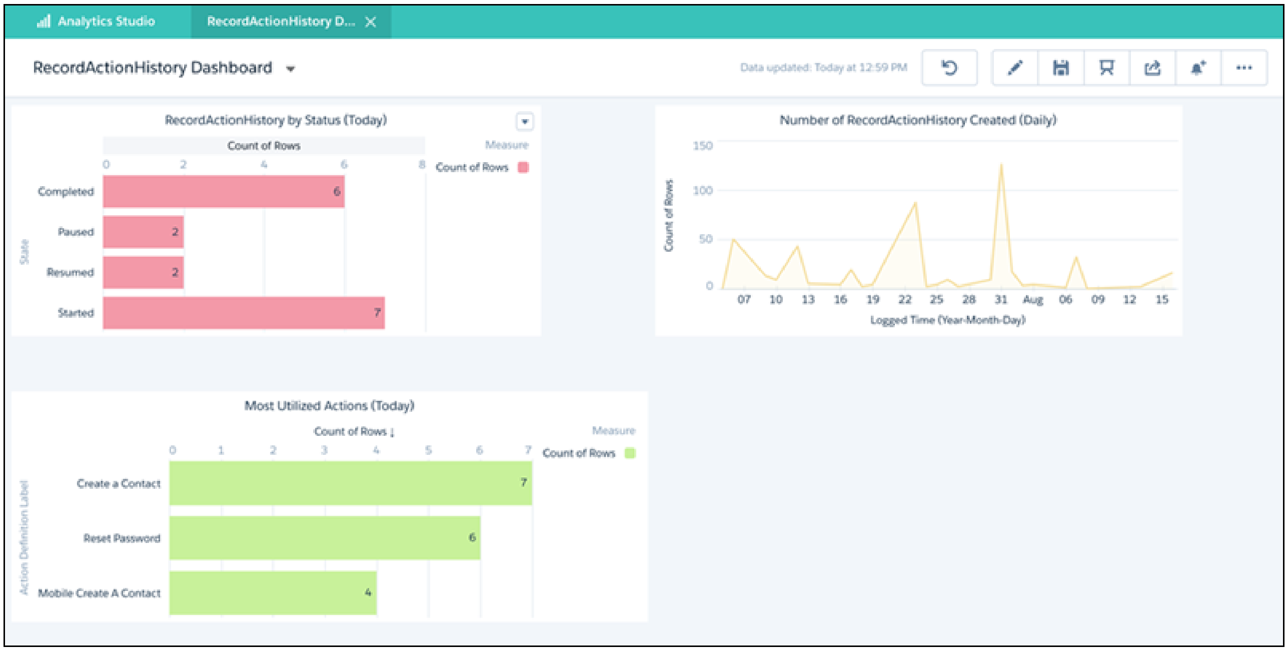
Use APIs to Query the Action History

You can also use APIs to query the RecordActionHistory object, which is a big object.

Note: The RecordActionHistory object is read-only. It is available in API version 44.0 and later.

Both synchronous and asynchronous queries are supported. Using SOQL, SOAP, REST, Bulk, or Apex APIs, synchronous queries must follow a specific pattern or they fail. See the description and examples in the Object Reference for Salesforce and Lightning Platform. To learn more about big objects and how to query them, see the Query Big Objects module on Trailhead.

If you have access to Analytics, you can query the RecordActionHistory object and use the data to build an Analytics dashboard. For example, the dashboard can show usage data and compare how many actions were started, paused, resumed, and completed in a given time period.


Analytics Studio
RecordActionHistory D...
RecordActionHistory Dashboard
Data updated: Today at 12:59 PM
RecordActionHistory by Status (Today)
Count of Rows
0 2 4 6 8
State
Completed 6
Paused 2
Resumed 2
Started 7
Measure
Count of Rows
Number of RecordActionHistory Created (Daily)
Count of Rows
150 100 50 0
07 10 13 16 19 22 25 28 31 Aug 06 09 12 15
Logged Time (Year-Month-Day)
Most Utilized Actions (Today)
Count of Rows ↓
0 1 2 3 4 5 6 7
Action Definition Label
Create a Contact 7
Reset Password 6
Mobile Create A Contact 4
Measure
Count of Rows

Lightning Flow for Service Considerations

Learn about how packaging, change sets, and the sharing model can impact your Lightning Flow for Service implementation.

Packaging

When you package up your implementation, the package includes your Actions & Recommendations deployment settings. Any processes and flows that reference flows through RecordActions are also included in the package. For example, if Flow A creates a RecordAction that references Flow B, adding Flow A to a package also adds Flow B to the package.

When you add your app to the package, here's what's included:

- All the objects in the app
- For each object, the associated page layouts, Lightning pages (including the page with the component), active processes, and quick actions. The package includes the Actions & Recommendations deployment and settings defined in the deployment.
- If a deployment references flow actions, those flows are included.

  Note: Make sure that flows in your deployment are active before you create a package. Otherwise, inactive flows in a deployment can cause the package not to install successfully.

- If a process includes flow actions, those flows are included.
- If an object includes flow quick actions, those flows are included

Change Sets

You can add the RecordAction Deployment component to your change sets.

An option in Process Automation Settings determines whether flows are deployed as active or inactive (see Deploy Processes and Flows as Active). Unless the **Deploy processes and flows as active** option is set, your flows are deployed as inactive. After using a change set to move a deployment from a sandbox to production, check to make sure that your flows are active.

Sharing Model

Access to the RecordAction object is determined by a user's access to the associated parent record. This sharing model applies to access in the user interface, API, Bulk API, and Bulk API 2.0.

- If the user has read access on the record that the action is associated with, the user can perform all operations (create, read, update, and delete) on the corresponding RecordAction.
- If the user doesn't have read access on the record that the flow is associated with, then the user doesn't have access to the associated RecordAction.

Note: When using RecordAction and Salesforce Object Query Language (SOQL), make sure that your queries filter by the parent record. To filter by the parent record, use a where clause for users without Modify All Data permission. Otherwise, the query doesn't work. If the user has Modify All Data permission, a where clause isn't necessary to filter correctly.

Here's an example of a where clause for RecordAction.

```
SELECT fields FROM RecordAction WHERE RecordId=ENTITY_ID
```

LIGHTNING FLOW FOR SERVICE IMPLEMENTATION CHECKLIST

Review the Lightning Flow for Service checklist before you roll out your implementation.

Tip: If you're new to process automation, we recommend completing Automate Your Business Processes with Salesforce Flow in Trailhead. The Lightning Flow for Service module in Trailhead can also help you prepare.

We recommend that you have a working knowledge of the following features and user interfaces.

- Process automation tools, like Process Builder and Flow Builder
- Einstein Next Best Action, if you plan to show recommendations from action strategies to your users
- Lightning App Builder
- Lightning console or standard navigation apps

You need the following permissions to complete an end-to-end implementation.

User Permissions Needed	
To create flows in Flow Builder:	Manage Flow
To create quick actions:	Customize Application
To manage deployments in Setup that include flows and quick actions:	
To manage deployments in Setup that include recommendations:	Modify All Data OR Manage Next Best Action Strategies
To view Actions & Recommendations deployments in component properties:	View Setup and Configuration
To create a process in Process Builder:	Manage Flow AND View All Data
To create and save pages in the Lightning App Builder:	Customize Application
To create or manage Lightning apps:	
To set up and configure Chat:	
To set up and configure Open CTI:	Manage Call Centers

To let your users run flows from an Actions & Recommendations component, make sure that they have the correct flow permissions. For flows that change data, users need permission to create, read, edit, and delete the relevant records and fields.

User Permission Needed	
To run flows:	Flow User OR `Flow User` field enabled on the user detail page

User Permission Needed	
	OR Manage Flow OR If **Override default behavior and restrict access to enabled profiles or permission sets** is selected for an individual flow, access to that flow is given to users by profile or permission set

To set up recommendations, you need these permissions.

User Permission Needed	
Display Recommendations as a tab:	**Default On** for Tab Setting for Recommendations object
Create and manage recommendations:	Modify all data OR Manage Next Best Action Recommendations

To manage or run action strategies, you need these permissions.

User Permission Needed	
To create or manage action strategies:	Modify All Data OR Manage Next Best Action Strategies
To run an action strategy:	Run Flows OR Flow User field enabled on the user detail page

Use the following individual setup tasks when implementing Lightning Flow for Service.

Task	Complete If...
Create Actions to Show	You want to create a flow, quick action, or recommendation that shows in the component.
Associate Actions to Records with a Deployment	You want to define component settings: what type of guidance to show, channel defaults, and additional actions that users can

Task	Complete If...
	start at run time. You can also create deployments programmatically using the Metadata API.
Associate Actions to Records with Process Builder	You want to create a process for actions declaratively using Process Builder. With Process Builder, you can automatically associate actions with a record when the record meets criteria that you define.
Associate Actions to Records with SOAP	You want to associate actions to records programmatically using SOAP API.
Associate Actions to Records with Apex	You want to associate actions to records programmatically using Apex.
Customize Your Lightning Pages with the Actions & Recommendations Component	You want to add the component to record pages in your app.
Integrate Chat with Lightning Flow for Service	You want to integrate Lightning Flow for Service with Chat.
Integrate Open CTI with Lightning Flow for Service	You want to integrate Lightning Flow for Service with Open CTI and configure your softphone screen pop settings.

CREATE ACTIONS TO SHOW

Create the actions and recommendations that you want to users to start from the Actions & Recommendations component. You can show flows, quick actions, and recommendations that result from Next Best Action strategies.

1. Create a flow.
   - a. To create flows that interactively guide your users, use Flow Builder, a point-and-click tool that lets you automate business processes.

     The component can show screen flows, field service mobile flows, and autolaunched flows. You can also define the flow to include stages so that users can see where they are in a series of steps.

     Note: If you want to pass the parent record ID into a flow when it's launched from the component, create a flow text input variable named `recordId`. The name is case-sensitive. When an agent launches the flow from the component, the parent record ID is passed into the flow variable. Your flow can then use the parent record ID to update a field in the record, for example.

   - b. Test your flow

     Before you activate your flow, test it and make sure that it's working as expected.

   - c. Activate your flow.

     To appear in the Actions & Recommendations component, your flow must be active.

2. Create a quick action.

   You can create a global or object-specific quick action and show it in the component. For the quick action to appear in the component, add it to the record page layout.

3. Create offers or actions to recommend to users using Next Best Action strategies.
   - a. Create recommendations.

     Recommendations are customized actions and offers that you want to present to users. When you create a recommendation, specify a screen flow that starts when the user accepts the recommendation.

   - b. Create an action strategy.

     To determine which recommendations show in the component, create an action strategy. Action strategies use business rules, predictive models, and other data sources to filter recommendations.

SEE ALSO:

Associate Actions with Records

Aura Components Developer Guide: Use Aura Components with Flows

Salesforce Help: Show Users Progress Through a Flow with Stages

Salesforce Help: Create Global Quick Actions

Salesforce Help: Create Object-Specific Quick Actions

Salesforce Help: Einstein Next Best Action

ASSOCIATE ACTIONS WITH RECORDS

To associate actions to records declaratively, configure channel-specific defaults in an Actions & Recommendations deployment or use Process Builder. To associate flows to records programmatically, use SOAP or Apex. After you add the Actions & Recommendations component to your Lightning pages, you can display RecordActions that you've configured.

Associate Actions to Records with a Deployment

Use an Actions & Recommendations deployment to show default actions when records open from phone screen popups, chats, list views, or related records. A deployment also lets you show recommendations from Next Best Action strategies. After you create a deployment, select it in the Actions & Recommendations component on your Lightning record pages.

Associate Actions to Records with Process Builder

Process Builder is a point-and-click automation tool that you can use to design processes that kick off when a new or updated record meets specific criteria. After you create flows and quick actions, you can associate them with a record by building a process. Use Process Builder to create a process that, when triggered, creates a RecordAction. The RecordAction represents an association between an action and the record that kicked off the process.

Associate Actions to Records with SOAP

If your business maintains code outside the Salesforce platform, you can use SOAP API to create, retrieve, update, or delete a RecordAction.

Associate Actions to Records with Apex

If you want to control how you trigger the creation of a RecordAction, you can use Apex to associate actions to records. The RecordAction object is exposed as a standard object in Apex. You can trigger it before a DML operation or on delete or undelete. You can also provide custom error handling.

SEE ALSO:

Developer Documentation: *Process Automation Cheatsheet*

Associate Actions to Records with a Deployment

Use an Actions & Recommendations deployment to show default actions when records open from phone screen popups, chats, list views, or related records. A deployment also lets you show recommendations from Next Best Action strategies. After you create a deployment, select it in the Actions & Recommendations component on your Lightning record pages.

When you configure an Actions & Recommendations deployment, you define these settings.

- Type of guidance to show—Select at least one option, **Flows and quick actions** or **Recommendations**.
- Context objects—Specify which objects to use for object-specific quick actions and action strategies.
- Channel defaults—For each channel, define the default actions that appear when a record is opened in that channel and no other RecordAction associations exist.
- Additional actions—Define which actions users can launch at run time, as needed. When a user clicks Add and selects an action, it starts. We create a RecordAction that associates the action with the current record page.
- Recommendation settings—Specify how Next Best Action recommendations appear, how many to show, and which action strategies to use.

Note: You can use Process Builder to create RecordActions that appear in the component, but to show recommendations, create a deployment or use API.

Before you configure a deployment, first set up the flows and quick actions that you want to show in the component. If you want to include recommendations from Next Best Action strategies, configure them first as well.

You can define a deployment in Setup, or programmatically using the metadata type RecordActionDeployment.

1. From Setup, in the Quick Find box, enter `Actions & Recommendations`, and select **Actions & Recommendations**.
2. Click **New Deployment**.
   a. Name your deployment.
   b. Select at least one type of guidance to show, for example, **Flows and quick actions**. To display actions and offers that result from filtering recommendations with your Next Best Action strategies, select **Recommendations**.

      Note: If you edit a deployment and deselect a type of guidance, we delete the related settings.

3. Select up to 10 objects that provide context for object-specific quick actions and Next Best Action strategies.

   You can associate quick actions and strategies with specific object types, giving them an object-specific, rather than global, context. When a page for a selected object opens, the component lists the global and object-specific actions and recommendations. On other pages, it displays only the global items.

   For example, you define an object-specific quick action for the Contact object. To show this quick action in the component on Contact pages, add Contact as a context object. Or, to filter recommendations with a strategy that uses case fields, add the Case object as a context object. Then, in strategy settings, select a strategy that filters recommendations for cases.

   Note: To use object-specific quick actions in a deployment, add them to record page layouts for those objects. The component shows quick actions that are available in the page layout.

4. If you selected the option to show flows and quick actions, configure a default list for each channel.

   Important:

   - The component shows channel defaults only when no other RecordActions exist and the record page is opened in that channel. For example, if you set up a process in Process Builder that creates RecordActions for a record page, the component shows the RecordActions from your process instead of the channel defaults that you configure here.
   - If a default action is added to an existing deployment, users see the action in the Actions & Recommendations component on new records only.

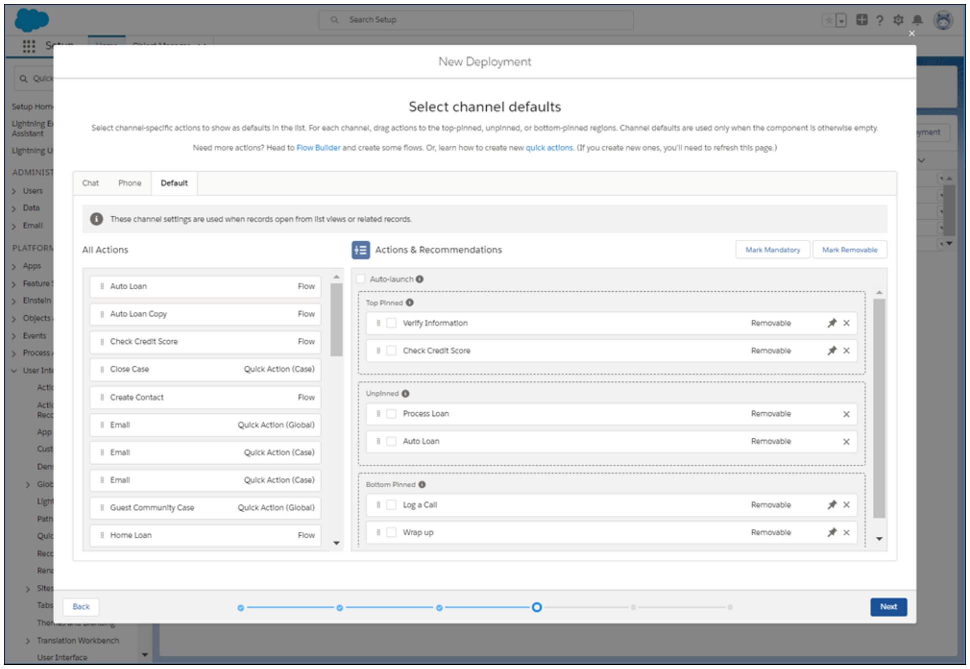
   a. Click a tab to configure settings for that channel.
      - Chat

        This channel works with Chat in Lightning Experience. Use this channel to specify default actions for when agents chat with customers. To use this channel, add the component to the chat transcript record page.
      - Phone

        This channel works with Open CTI. Use this channel to specify default steps for when customers call and records are shown to the agent. To use this channel, update your softphone screen pop settings for no matching records and single-matching records.
      - Default

        Use this channel to specify default actions for when records open from list views or related records.

      The Chat and Phone channels display even if you don't have these features in your org.



New Deployment

Select channel defaults

Select channel-specific actions to show as defaults in the list. For each channel, drag actions to the top-pinned, unpinned, or bottom-pinned regions. Channel defaults are used only when the component is otherwise empty.

Need more actions? Head to Flow Builder and create some flows. Or, learn how to create new quick actions. (If you create new ones, you'll need to refresh this page.)

Chat | Phone | **Default**

These channel settings are used when records open from list views or related records.

All Actions

Auto Loan	Flow
Auto Loan Copy	Flow
Check Credit Score	Flow
Close Case	Quick Action (Case)
Create Contact	Flow
Email	Quick Action (Global)
Email	Quick Action (Case)
Email	Quick Action (Case)
Guest Community Case	Quick Action (Global)
Home Loan	Flow

Actions & Recommendations — Mark Mandatory | Mark Removable

□ Auto-launch

Top Pinned

□ Verify Information	Removable
□ Check Credit Score	Removable

Unpinned

□ Process Loan	Removable
□ Auto Loan	Removable

Bottom Pinned

□ Log a Call	Removable
□ Wrap up	Removable

You can configure multiple channels. For example, if you use Open CTI, you can configure actions for the Phone and Default channels. That way, agents can select actions from the list when a caller’s contact record is popped. Agents can also navigate to a contact record manually, such as when they open a record from a list view. Then they see the actions that you set up in the Default channel.

Note: For information about Chat and Open CTI integration, see Integrate Chat with Lightning Flow for Service and Integrate Open CTI with Lightning Flow for Service.

b. On each channel, drag actions from **All Actions** to the preview area.

The preview area has three regions: Top Pinned, Unpinned, or Bottom Pinned. Use the pinned regions to specify actions that you want your users to complete first and last. The Unpinned region is for actions that you want your users to complete during the record’s life cycle.

c. Select actions that are important, and click **Mark Mandatory**.

When a user tries to close a flow that’s marked as mandatory without completing it, a reminder appears.

Note: You don’t see a reminder for quick actions or autolaunched flows that are marked as mandatory.

d. Select actions that you don’t want users to remove at run time, and click **Unmark Removable**. By default, all actions are removable.

e. Specify whether to auto-launch the first action when the record page opens.

f. Click **Save**.

5. If you selected the option to show flows and quick actions, narrow the list of actions that users can launch at run time. When the user clicks Add, the component shows the subset of actions that you configure here.

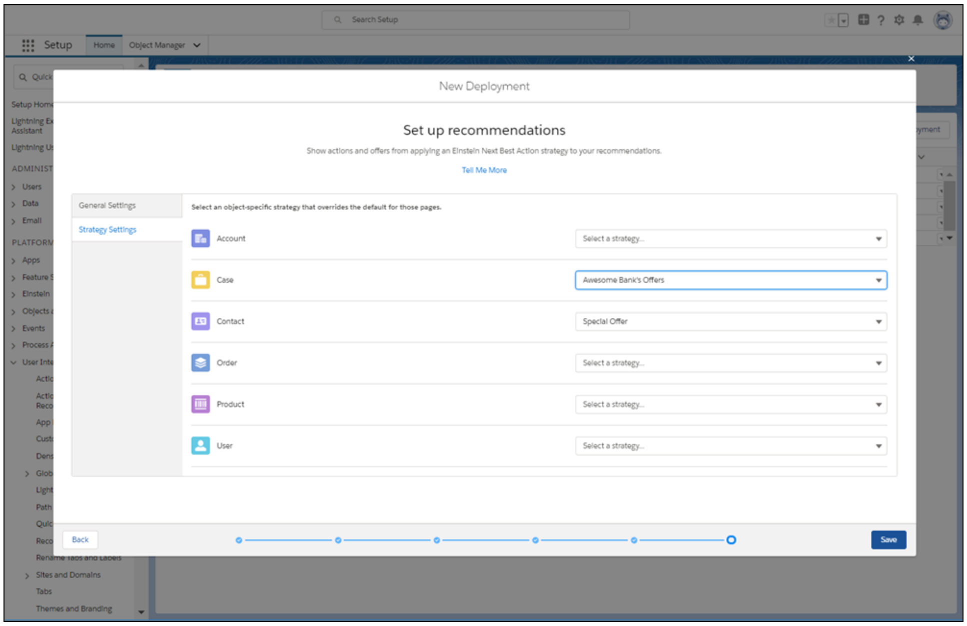
6. If you selected the option to show recommendations, configure display settings and Next Best Action strategies.

a. On the General Settings tab, set up how recommendations display, and select a default strategy.

Set the maximum number of recommendations to a value from 1 to 4.

b. On the Strategy Settings tab, you can select object-specific strategies that override the default strategy on those pages.

Note: For the component to display recommendations, select a default or an object-specific strategy. A strategy loads and filters recommendations so that your users can see the best next steps.



New Deployment

Set up recommendations

Show actions and offers from applying an Einstein Next Best Action strategy to your recommendations.

Select an object-specific strategy that overrides the default for those pages.

Account	Select a strategy...
Case	Awesome Bank's Offers
Contact	Special Offer
Order	Select a strategy...
Product	Select a strategy...
User	Select a strategy...

c. Click **Save**.

7. In Lightning App Builder, add the Actions & Recommendations component to a page, and select the deployment.

If you don't select a deployment in component properties, no actions appear when the user clicks Add. In addition, the component is empty unless other RecordActions exist for the record page.

Associate Actions to Records with Process Builder

Process Builder is a point-and-click automation tool that you can use to design processes that kick off when a new or updated record meets specific criteria. After you create flows and quick actions, you can associate them with a record by building a process. Use Process Builder to create a process that, when triggered, creates a RecordAction. The RecordAction represents an association between an action and the record that kicked off the process.

RecordActions appear in the Actions & Recommendations component on the record page, ready for your users to start.

Note: When you associate actions to records using Process Builder, you override any channel defaults that you configured in an Actions & Recommendations deployment.

1. Define the process properties.

   The process properties uniquely identify your process.

2. Configure the process trigger.

   Every process includes a trigger, which tells the process when to start. How you configure that trigger depends on what type of process you're creating.

3. Add process criteria.

   Define the criteria that must be true before the process can execute the associated actions.

4. Add actions to your process and create a record from the process.

   After you define a criteria node, create a record from the process when criteria are met. Actions are executed in the order in which they appear in the Process Builder.

   Note: `Flows` is a supported Action Type in Process Builder. This type is different from creating a RecordAction. An Action Type of `Flows` supports only flows that don't have screens, and is invoked immediately when the process is triggered. Creating a RecordAction doesn't invoke the flow; rather, it associates a record with the flow so that your users can run it.

   Important: To associate flows or quick actions to records, you must create a RecordAction.

   Specify the following.

   - Action Type: `Create a Record`
   - Record Type: `RecordAction`

   Set field values for the Create a Record action.

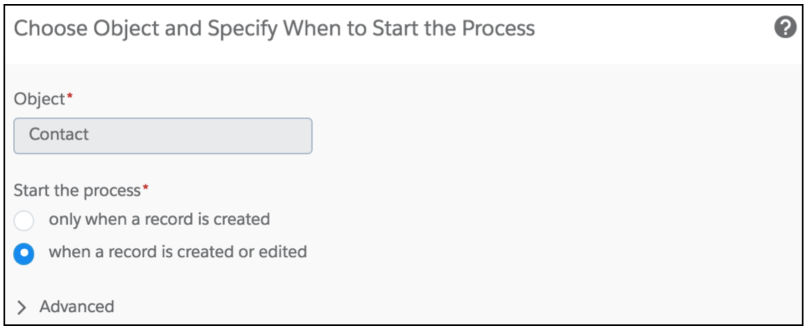
Field	Type	Value
Action	Picklist	Specify the action that you want to associate with the record.
Action Type	Picklist	Specify whether the action is a flow or a quick action.
Order	Number	Specify the order of the action among all actions associated with this record. Actions are ordered in comparison to other actions in their pinned or unpinned region. If two actions have the same order, then they are sorted by their last modified date.
Parent Record ID	Field Reference	Specify the record associated with the action. For most use cases, select the ID for the object you've selected for your process trigger. For example, if you used the contact object, set the value to *`[Contact].Id`*.
Is Mandatory	Boolean	If set to `True`, the flow is required. When a mandatory screen flow is launched, if the user tries to close the tab or window, a message appears and reminds the user to complete the flow. The reminder doesn't appear for quick actions or autolaunched flows.
Hide Remove Action in UI	Boolean	If set to `True`, users can't see the Remove option for the action in the component. However, actions can still be deleted using the API.
Pinned	Picklist	Specify whether the action is pinned to the top or bottom of the component. To display the action in the unpinned region, use None.

5. Activate your process.

When your criteria are met and your process runs, the actions that you specified are associated with the parent record.

Example: Create a process that adds a required flow for users to verify a contact's information, like an email address, when their phone number changes.

1. Choose the contact object, and start the process when a record is created or edited.



Choose Object and Specify When to Start the Process

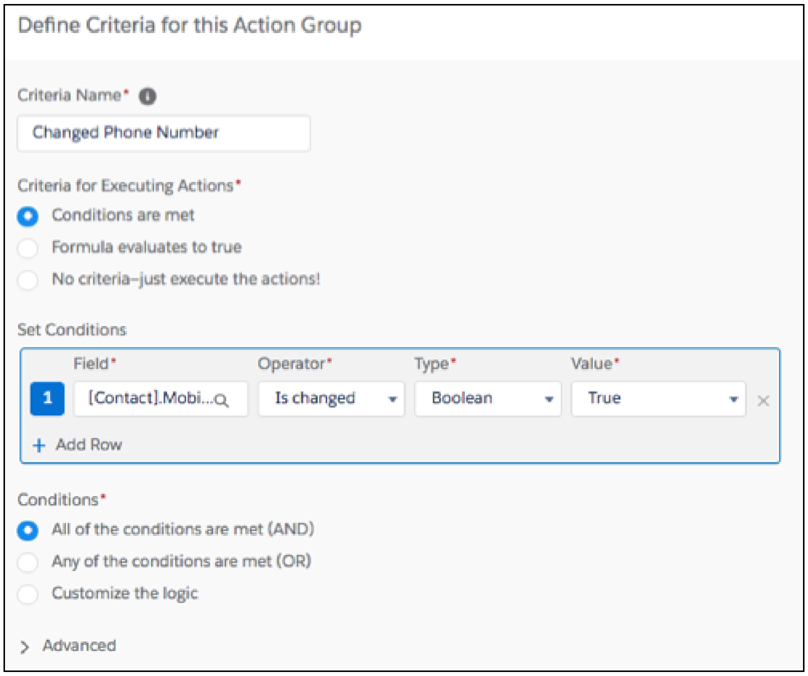
Object* Contact

Start the process*

○ only when a record is created

● when a record is created or edited

2. Create criteria for when the `[Contact].MobilePhone` field changes.



Define Criteria for this Action Group

Criteria Name* Changed Phone Number

Criteria for Executing Actions*

● Conditions are met

○ Formula evaluates to true

○ No criteria—just execute the actions!

Set Conditions

	Field*	Operator*	Type*	Value*
1	[Contact].Mobi...	Is changed	Boolean	True

Conditions*

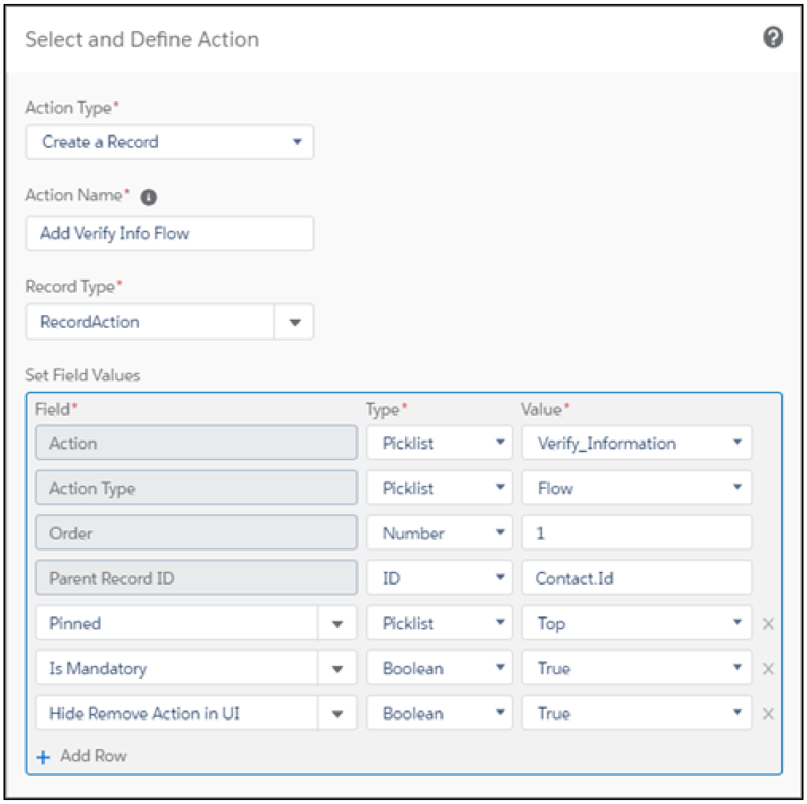
● All of the conditions are met (AND)

○ Any of the conditions are met (OR)

○ Customize the logic

3. Add a Create a Record action, and specify `RecordAction` for the Record Type

4. Set field values for the record, pointing to your `Verify_Information` flow and the parent record ID. To encourage the user to complete this flow, specify the Is Mandatory field as `True`.



Select and Define Action

Action Type*
Create a Record

Action Name*
Add Verify Info Flow

Record Type*
RecordAction

Set Field Values

Field*	Type*	Value*
Action	Picklist	Verify_Information
Action Type	Picklist	Flow
Order	Number	1
Parent Record ID	ID	Contact.Id
Pinned	Picklist	Top
Is Mandatory	Boolean	True
Hide Remove Action in UI	Boolean	True

5. Activate the process.

   When the contact's MobilePhone field changes, the Verify Information flow opens as a subtab on the contact record. An asterisk next to the flow indicates that it is mandatory.

Associate Actions to Records with SOAP

If your business maintains code outside the Salesforce platform, you can use SOAP API to create, retrieve, update, or delete a RecordAction.

Note: RecordAction is available in API version 42.0 and later.

SEE ALSO:

SOAP API Developer Guide: RecordAction

Associate Actions to Records with Apex

If you want to control how you trigger the creation of a RecordAction, you can use Apex to associate actions to records. The RecordAction object is exposed as a standard object in Apex. You can trigger it before a DML operation or on delete or undelete. You can also provide custom error handling.

Note: RecordAction is available in API version 42.0 and later.

Here are some scenarios that Apex better accommodates.

- Triggering before a DML operation rather than after
- Triggering on delete and undelete DML operations
- Validating data before the action is run
- Custom error handling
- Partial completion rather than complete failure

Example: This example uses an Apex class and trigger pair to associate a flow to a newly created account that satisfies specific criteria. In the class, a method is defined that takes in a list of accounts and creates a RecordAction for each of them. It sets the new account as the RecordId and the ActionDefinition as an active flow. The trigger is called after the insert of an account record. When the criterion (type is Customer) is satisfied, the class method is executed, and it adds the defined flow to the new account.

Apex Class

```
public class RecordActionHandler {
    public static void addNewCustomerFlow(Account[] accts) {
        RecordAction[] recordActions = new List<RecordAction>();
        for (Account a : accts) {
            RecordAction ra = new RecordAction(RecordId=a.Id,
ActionDefinition='New_Customer_Flow', Order=1, ActionType='Flow');
            recordActions.add(ra);
        }

        try {
            insert recordActions;
        } catch (DMLException e) {
            System.debug('An unexpected error has occurred: ' + e.getMessage());
        }
    }
}
```

Apex Trigger

```
trigger RecordActionTrigger on Account (after insert) {
    Account[] customerAccounts = new List<Account>();
    for (Account a : Trigger.new) {
        if (a.Type == 'Customer') {
            customerAccounts.add(a);
        }
    }
    RecordActionHandler.addNewCustomerFlow(customerAccounts);
}
```

SEE ALSO:

Apex Developer Guide

CUSTOMIZE YOUR LIGHTNING PAGES WITH THE ACTIONS & RECOMMENDATIONS COMPONENT

The Actions & Recommendations component displays RecordActions associated to the parent record. Add the component to your Lightning pages so that users can see the actions that they can take.

Note: You can add the Actions & Recommendations component to Lightning console and standard navigation pages for most objects. To learn about supported objects, see Supported Apps, Channels, and Objects.

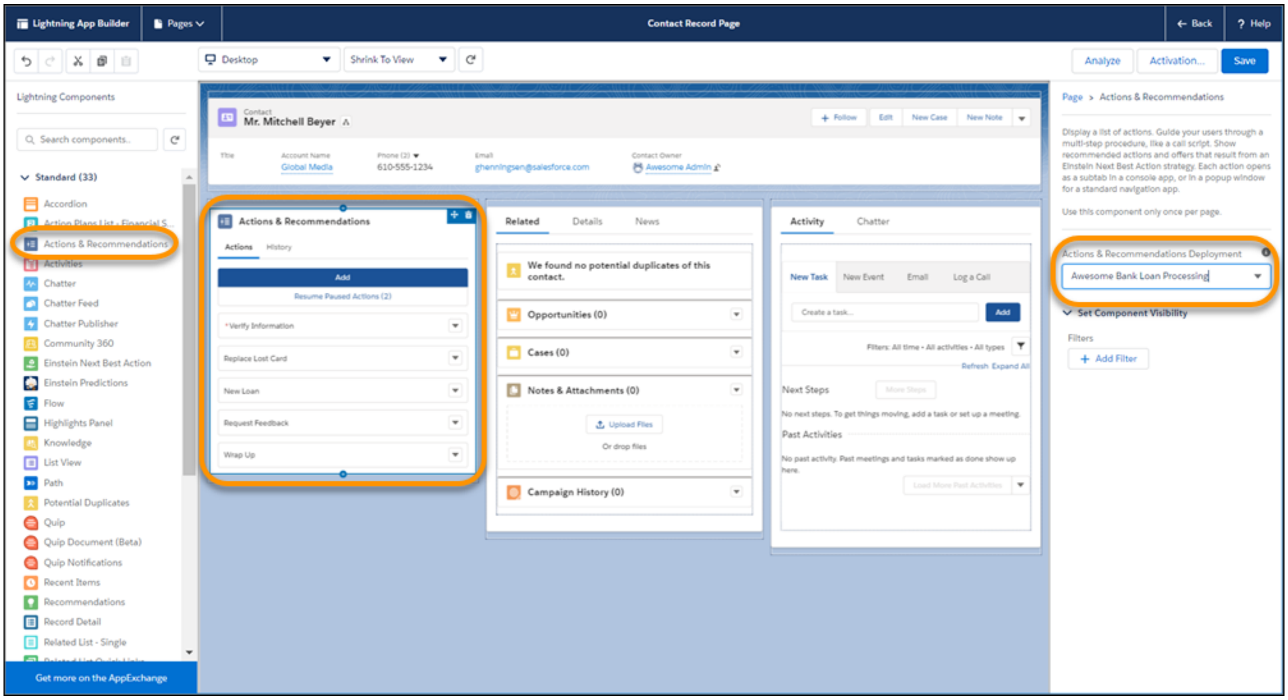
First, plan out your user's experience. When do you want users to see the component? What records will your users be on? What other information do you want your users to see on the page?

After you identify a record page to edit, create a custom Lightning page for it using one of the pinned region templates available in the Lightning App Builder. The pinned region page allows you to display the Actions & Recommendations component while flows open in subtabs for console apps.

1. Before you add the component to your record pages, create an Actions & Recommendations deployment.
2. Add the component to your pages.

   In the Lightning App Builder, drag the Actions & Recommendations component to a pinned region on a page. For the Service Console app, we recommend adding the component to the left pinned sidebar.

3. Select the deployment in component properties.



Display a list of actions. Guide your users through a multi-step procedure, like a call script. Show recommended actions and offers that result from an Einstein Next Best Action strategy. Each action opens as a subtab in a console app, or in a popup window for a standard navigation app.

Use this component only once per page.

Actions & Recommendations Deployment: Awesome Bank Loan Processing

   If you don't select a deployment, no actions appear when the user clicks Add. In addition, the component is empty unless other RecordActions exist for the record.

4. Save your Lightning page.

If needed, activate the page and assign it to your app.

SEE ALSO:

Salesforce Help: Create and Configure Lightning Experience Record Pages

INTEGRATE CHAT WITH LIGHTNING FLOW FOR SERVICE

Customers who chat with you are often looking for quick and immediate resolutions to their problems. Lightning Flow for Service helps your agents provide consistent and efficient service. Agents can view your business processes in context of the customer chat because actions are presented as subtabs of the Chat Transcript primary tab. Agents see the appropriate actions to take right up front, without having to manually search for them.

Lightning Flow for Service supports Chat in Lightning Experience, which uses Omni-Channel routing.

1. Set up your actions.

   Use Flow Builder to create individual flows. Create quick actions, and add them to the record page layout so that they can appear in the component.

2. Create an Actions & Recommendations deployment.

   In the settings for the Chat channel, specify the actions that agents see by default. Specify which actions you want agents to complete first and last, and whether to auto-launch the first flow in the list. Optionally, select the actions that you want agents to see when they click **Add**.

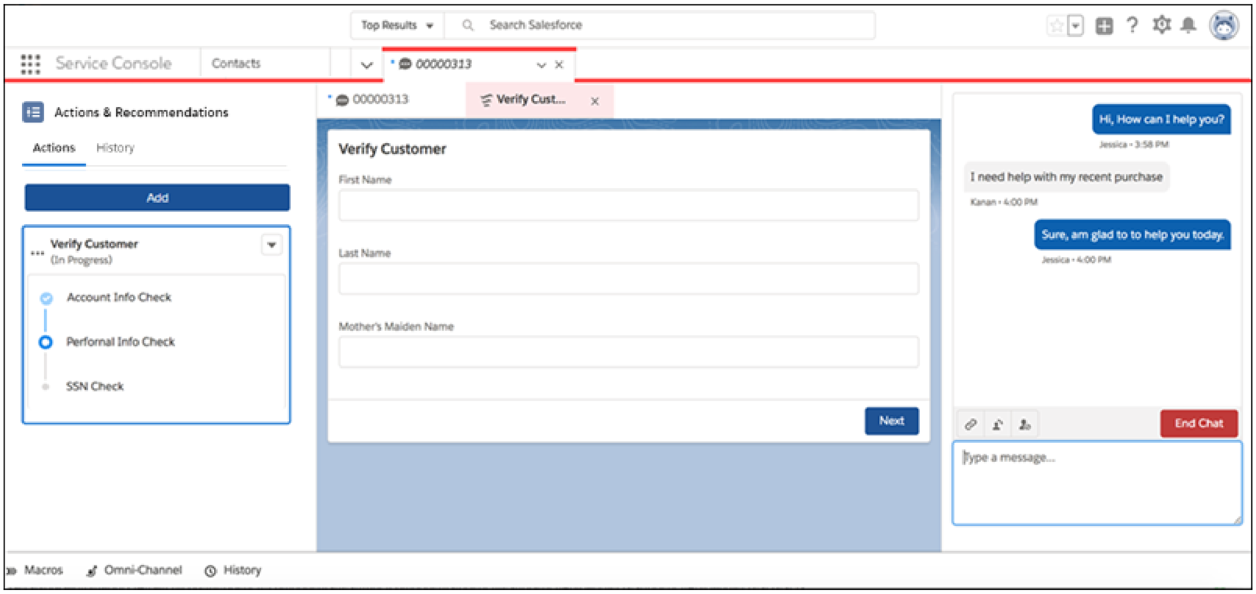
3. Create a Lightning console record page.

   a. In Lightning App Builder, create a record page for the Chat Transcript object using the Console: Pinned Left and Right Sidebars page template.

   b. Add the Actions & Recommendations component to the left column, and specify the deployment name in component properties.

   c. Place the Chat Body component in the right column.

Example: This Chat Transcript page displays the Actions & Recommendations and Chat Body components.



Hi, How can I help you?
Jessica • 3:58 PM

I need help with my recent purchase
Kanan • 4:00 PM

Sure, am glad to to help you today.
Jessica • 4:00 PM

SEE ALSO:

Salesforce Help: Set Up Chat in Lightning Experience

INTEGRATE OPEN CTI WITH LIGHTNING FLOW FOR SERVICE

Open CTI provides a set of APIs that enables third-party telephony services to integrate with Salesforce. Lightning Flow for Service takes advantage of three Open CTI methods: `getSoftphoneLayout()`, `screenPop()`, and `searchAndScreenPop()`.

1. Update your Open CTI implementation to allow incoming calls to screen-pop to flows.

   You can also pass call data, such as the phone number or customer name, directly to a flow when it's screen-popped.

   Use Open CTI API version 42.0 and later with the following methods.

   - getSoftphoneLayout()
   - screenPop()
   - searchAndScreenPop()

   Note: Before updating your implementation, make sure that you understand how Open CTI arguments are passed.

   Flows can accept input variables, which are also called arguments. The Actions & Recommendations component on a record page automatically attempts to pass the parent record ID to the flow. To use this information, the flow defines an input variable called `recordId` of type `Text`. The Open CTI API allows for more complex variable passing. Single variables and collection variables, like lists and arrays, can be passed through the `flowArgs` parameter available in the `screenPop` and `searchAndScreenPop` methods.

2. Create flows.

   For example, create an Unknown Caller screen flow for when there's an incoming call and there's no match in Salesforce for the caller. In Flow Builder, create a screen flow to verify the caller.

   - Add a screen with input components First Name, Last Name, Phone Number, and Address.
   - Add the Create Records element to create a contact and set the contact fields using the screen input components.
   - Connect the start element to the Unknown Caller screen.

   In addition to the Unknown Caller flow, create other flows and actions that you want your agents to use when talking to customers on the phone.

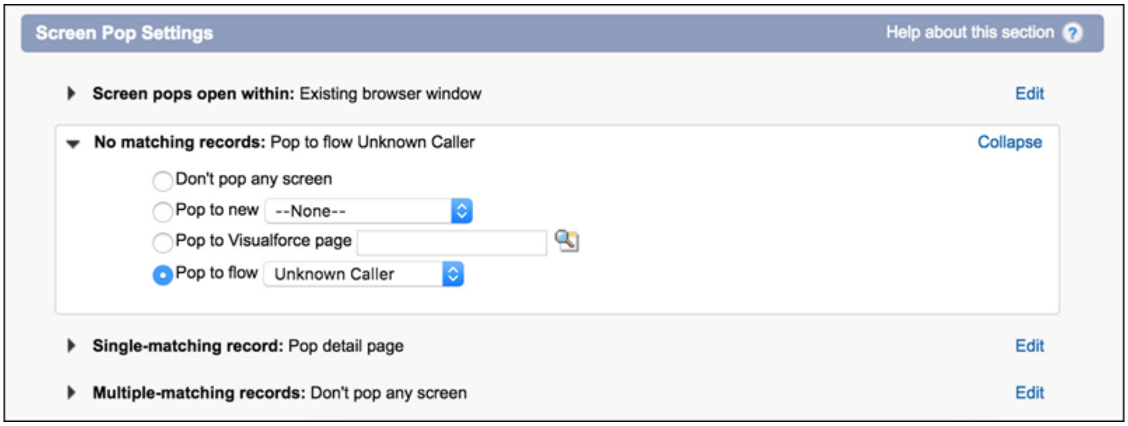
3. Configure screen-pop settings in the softphone layout.

   From Setup, go to the Softphone Layouts page.

   For No matching records, select **Pop to flow**. Then select the flow you created for Unknown Callers.

   Note: When you use the Pop to flow option, flows open as primary tabs in the console.

   For Single-matching records, select **Pop detail page**. This setting allows the contact record page, for example, to be popped.



Screen Pop Settings

- **Screen pops open within:** Existing browser window
- **No matching records:** Pop to flow Unknown Caller
  - ○ Don't pop any screen
  - ○ Pop to new --None--
  - ○ Pop to Visualforce page
  - ● Pop to flow Unknown Caller
- **Single-matching record:** Pop detail page
- **Multiple-matching records:** Don't pop any screen

4. Create an Actions & Recommendations deployment and configure default actions for the phone channel.
5. Customize the record page.

   Add the Actions & Recommendations component to a record page, such as the contact page. Select the deployment in the component properties. When calls match a Salesforce record and users get popped to that page, they can see which actions to complete for the call.

SEE ALSO:

Open CTI Developer Guide

Salesforce Help: Designing a Custom Softphone Layout

Salesforce Help: Assigning a Softphone Layout to a User Profile

Lightning Components Developer Guide: Set Flow Variable Values from a Lightning Component

OTHER RESOURCES FOR LIGHTNING FLOW FOR SERVICE

Learn about other resources, like developer guides and Trailhead, to help you get started with Lightning Flow for Service.

Process Automation

Trailhead: Lightning Flow for Service

Trailhead: Automate Your Business Processes with Salesforce Flow

Trailhead: Einstein Next Best Action

Salesforce Help: Automate Your Business Processes

Salesforce Help: Einstein Next Best Action

Cheatsheet: *Process Automation Cheatsheet*

App

Salesforce Help: Salesforce Console in Lightning Experience

Salesforce Help: Create and Configure Lightning Experience Record Pages

Integrations

Salesforce Help: Salesforce Call Center

Salesforce Help: Chat