



Profile Wizard (Flow Template)

Accelerator Setup Guide

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Profile Wizard (Flow Template)

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General Installation and Setup Notes

Greetings! Thank you for using free, managed apps and components from IBM Consulting, available via AppExchange. To ensure a smooth installation and setup experience, please review the following guidelines before proceeding.

Note on Support:

IBM Consulting does not provide any official support on our free applications that are available via AppExchange. However, we are absolutely interested in your feedback, whether regarding opportunities for improvement or just general input.

Full-featured Accelerators & Premium Support:

IBM Consulting does sell many additional accelerators that are not listed on AppExchange. Please [contact us directly](#) to learn more.

Setup Guide Version

Application features and functionality may change over time. The contents of this setup guide are applicable to the most current version of the application as of the time the guide is published.

Salesforce Product Compatibility

This application can be used in both the Lightning Experience (LEX) and Experience Cloud (community).
LWR Sites are currently not supported at this time.

Installation

Prerequisites

Some products require certain configuration to be completed prior to executing an install. If you install prior to completing these steps, you may encounter errors that prevent installation.

You may need to update the following general settings:

- Enable Communities
- Enable Chatter

Official Documentation

Please review the official [Salesforce notes on package installation](#).

Access

Application Access

Salesforce enforced significant modifications to the sharing of @AuraEnabled Apex classes in the Winter '21 release:

- [Restrict Access to @AuraEnabled Apex Methods for Guest and Portal Users Based on User Profile \(Update, Enforced\)](#)
- [Restrict Access to @AuraEnabled Apex Methods for Authenticated Users Based on User Profile \(Update, Enforced\)](#)

These changes mean that you may need to grant explicit access to certain Apex classes for corresponding profiles. To do that, you will need to grant access via profiles or permission sets. For profiles, you will enable Apex classes at the profile level. For permission sets, you will create a permission set with the relevant access and then add that permission set to relevant users and/or permission set groups. NOTE: Guest users are [handled via the guest user profile](#) at the community level.

Object and Field Access

Many IBM Consulting applications include custom objects. Please ensure that object and field level security is set for any users (including guest users) who will be using the application.

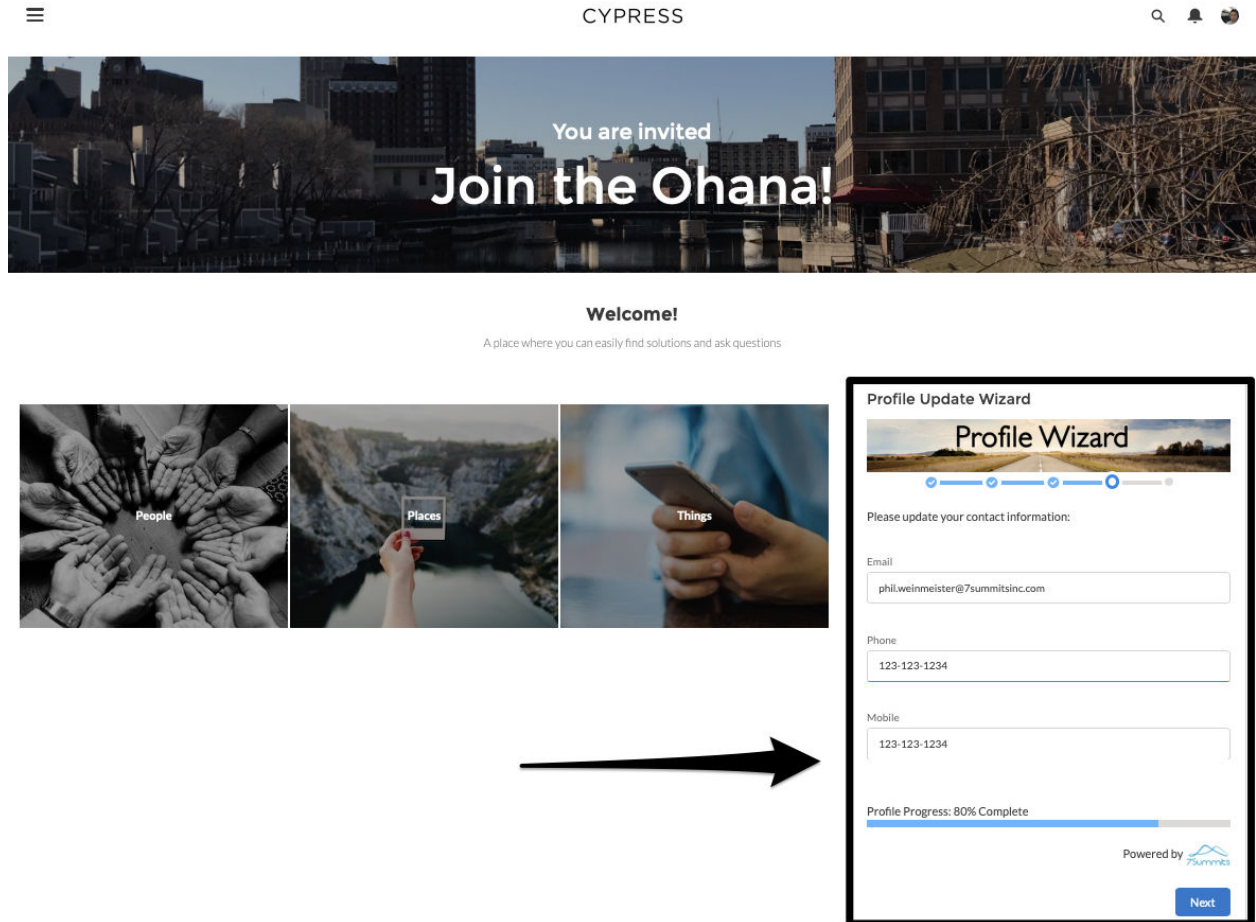
Overview

The IBM Consulting Profile Wizard for Salesforce app is a Flow Template. It is delivered as a templated Lightning Flow for Lightning Communities, Lightning Experience, and the Salesforce mobile app that includes a few custom Lightning components embedded within the Flow screens.

The app facilitates the easy completion of profile information from a convenient page within one of the interfaces described above.

The component groups pre-defined standard User fields into groups for completion:

- Job Details
- Address Details
- Contact Details



Prerequisites

Prerequisites for the component are minimal. You must ensure that any user using the Flow has the proper permission to view it:

User Edit Help for this Page ?

Chatter Expert

User Edit

Save Save & New Cancel

General Information

First Name

Last Name

Chatter Expert

Alias

Chatter

Email

noreply@chatter.salesfc

Username

chatty.00d2e0000012m

Nickname

Chatter Expert

Title

Company

7Summits PW UAT

User License

Chatter Free

Profile

Chatter Free User

Active

☒

Marketing User

☐

Offline User

☐

Sales Anywhere User

☐

Knowledge User

☐

Flow User

☐

Page Setup

This component can be used on any Lightning Community or Lightning Experience page. The instructions below provide details for setting up the component in a Lightning Community (Experience Cloud Site). The same component and setup steps apply if you are setting up the component on a Lightning Experience page using Lightning App Builder.

Lightning Community

To Place the Component in a Lightning Community:

Drag the **Flow** component onto the page using Community Builder and select “Profile Update Wizard” for the flow.

The screenshot displays the Lightning App Builder interface. At the top, the header shows 'Lightning App Builder', 'Pages', and 'Home Page Default'. Below the header, there are buttons for 'Desktop', 'Shrink To View', and 'Refresh'. On the left, the 'Lightning Components' panel is visible, showing a search bar and a list of components under the 'Standard (23)' category. The main canvas shows a preview of the 'Home Page Default' page layout, which includes sections for 'Quarterly Performance', 'Today's Events', 'Today's Tasks', 'Recent Records', and 'Key Deals - Recent Opportunities'. A black arrow points to a 'Flow Component: Profile Update Wizard' placeholder in the top right corner of the canvas. On the right side, the 'Page' configuration panel is open, showing fields for 'Label' (Home Page Default), 'Developer Name' (Home_Page_Default), 'Page Type' (Home Page), 'Template' (Standard Home Page), and 'Description'.

Lightning Experience

To Place the Component in Lightning Experience:

Drag the **Flow** component onto the page using Lightning App Builder and select “Profile Update Wizard” for the flow.

The screenshot displays the Lightning App Builder interface for editing a page titled "Home Page Default". The interface includes a top navigation bar with "Lightning App Builder", "Pages", and "Home Page Default". Below the navigation bar are buttons for "Desktop", "Shrink To View", and "Refresh". On the left, the "Lightning Components" panel shows a search bar and a list of standard components, including "App Launcher", "Assistant", "Campaign Marketplace", "Chatter Feed", "Chatter Publisher", "Dashboard", "Flow", "Items to Approve", "Key Deals", "List View", "Paused Flow Interviews", and "Performance". The "Flow" component is highlighted. In the center, a preview of the "Home Page Default" page is shown, featuring a "Quarterly Performance" chart, "Today's Events", "Today's Tasks", "Recent Records", and "Key Deals - Recent Opportunities". A black arrow points from the "Flow" component in the left panel to a placeholder box on the page labeled "Flow Component: Profile Update Wizard". On the right, the "Page" configuration panel shows fields for "Label" (Home Page Default), "Developer Name" (Home_Page_Default), "Page Type" (Home Page), "Template" (Standard Home Page), and "Description".

Component Configuration

Once the Flow component is placed on a page, use the property builder to configure for Profile Update Wizard:

Flow

Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.

* Flow

Profile Update Wizard

Edit Flow in Flow Builder

Optionally, enter values for these flow variables. Only variables that allow input access are supported.

Header_Image

Userld

Property	Description
Flow	Select "Profile Update Wizard"
Header_Image	Enter the name of a Static Resource image that is to be used for the header (URL or SLDS)
Userld	Enter the User ID if intended for a specific user. If left blank, the flow will default to the current, logged-in user

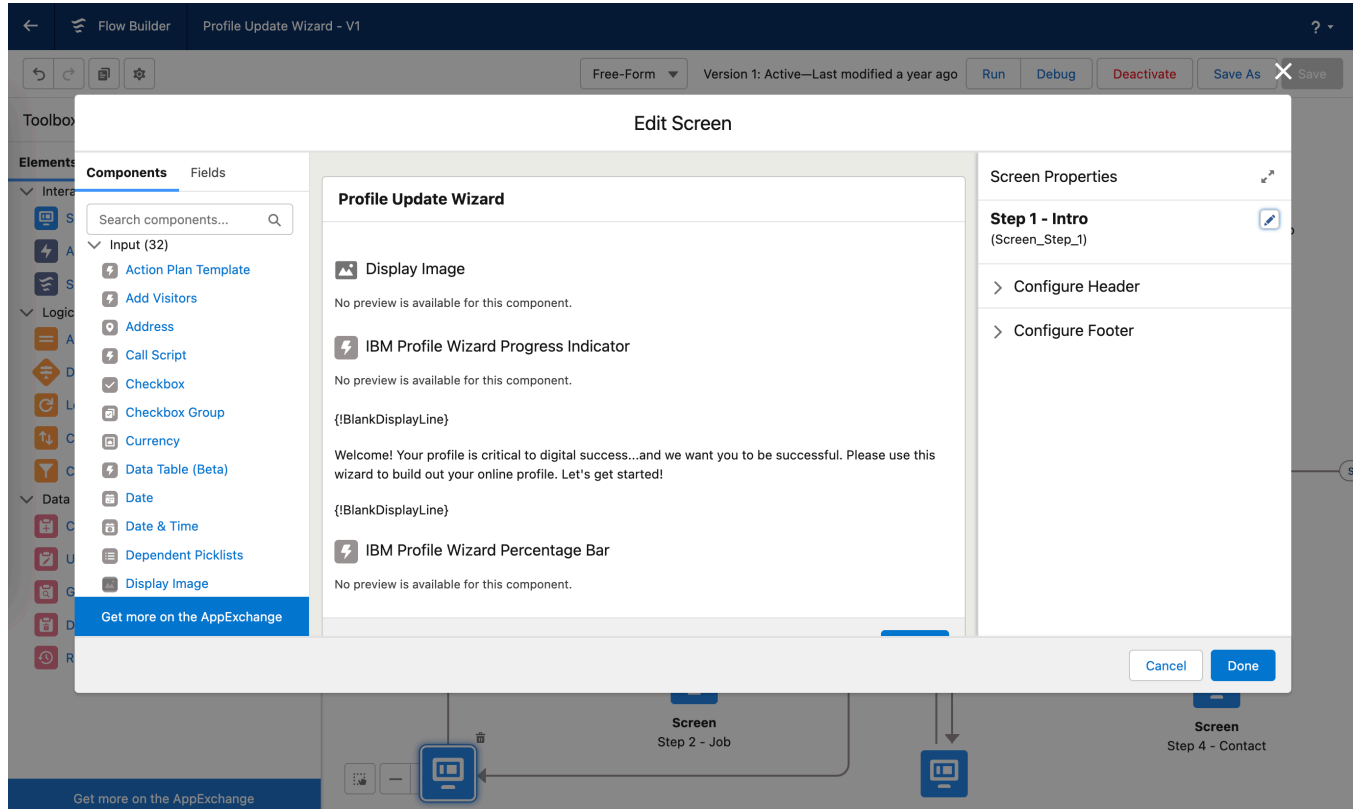


NOTE

To preview the Profile Wizard, you must access the site normally (not in Experience Builder mode)

Flow Settings

To customize your flow settings, press the "Edit Flow in Flow Builder" button on the property builder. In each flow screen four main sections are present. These components can be configured with Flow variables or specific values to drive the flow.



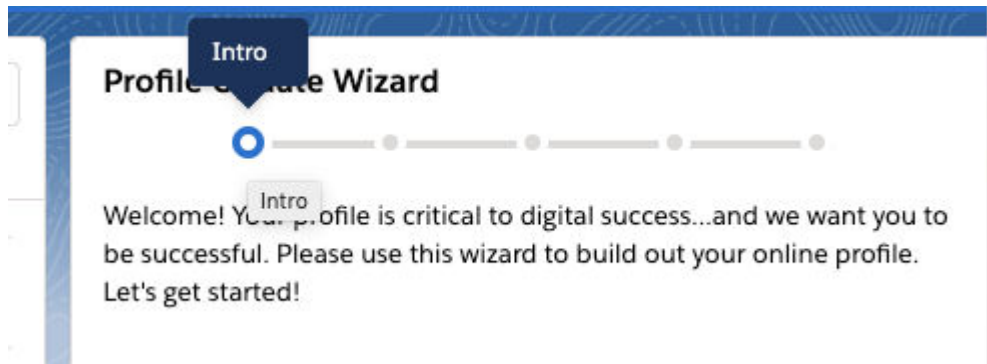
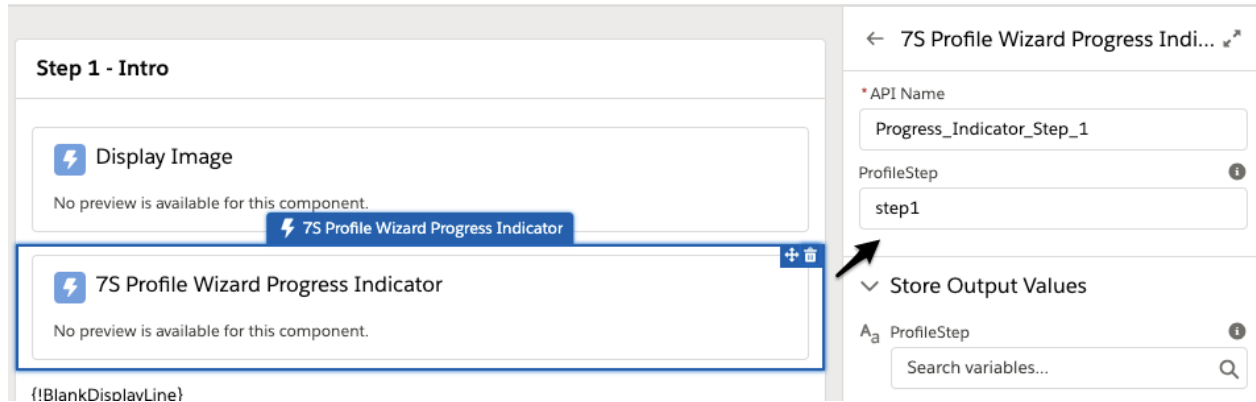
Display Image

This component takes in the static resource specified in Lightning App Builder or Community Builder and displays it as the header.

Profile Wizard Progress Indicator

This section uses the embedded custom component 7S Profile Wizard Progress Indicator. If you decide to rearrange the sequence of the screens, make sure to set ProfileStep properly (step2 would be Flow screen 2). This will ensure that the progress indicator correctly shows current step.

Profile Wizard (Flow Template)



Text/Form

This section uses standard Flow screen components. Add elements here, as desired.

Profile Wizard Percentage

The Percentage section simply takes in the "Percent_Complete" field, which you will not want to change unless you are using your own percentage calculation. It uses the embedded custom component 7S Profile Wizard Percentage Bar.

Step 1 - Intro

Display Image
No preview is available for this component.

7S Profile Wizard Progress Indicator
No preview is available for this component.

{!BlankDisplayLine}

Welcome! Your profile is critical to digital success...and we want you to be successful. Please use this wizard to build out your online profile. Let's get started!

{!BlankDisplayLine}

7S Profile Wizard Percentage Bar

7S Profile Wizard Percentage Bar
No preview is available for this component.

7S Profile Wizard Percentage Bar

* API Name
Percent_Complete_Step_1

Percent Complete
{!Percent_Complete}

Store Output Values

Percent Complete
Search variables...

Additional Modifications

Modifying the Profile Percentage Calculation

Let's say you want to look at different fields other than what comes in the Flow Template out-of-the-box. No problem!

It's a multi-step process.

1. Come up with your full list of fields. Determine what you want to show where. **NOTE: the progress indicator expects 5 screens, so that can't be changed.**
2. Add your own formula field to calculate percentage complete. You can reference the included field, "Profile_Percent_Complete".
3. Create Flow Variables for any new User fields you will be capturing.
4. Update the User_Lookup "Get Records" Element to assign the values of the new fields to the new variables. This includes your new profile percentage calculation field.
5. Lay out your new input fields in the flow.
6. Update the "Update Records" elements to ensure that population of the new fields will actually update the related record.
7. Save As, then activate your new Flow.
8. If done correctly, you can completely customize the flow to look at different user fields in your calculation.

Hiding the flow upon completion

Let's say you want to hide the flow when a user has filled out all desired fields. No problem!

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1. In your flow, you will add a decision point after grabbing the current profile complete %.
 - a. If < 100%, send them down the current flow path.
 - b. If 100%, do nothing or build out an alternative flow path.