

Lightning Flow Community Samples

Starting in the [Winter '18 release](#), it's easy to take the business processes, automation, and wizards you've created using [Visual Workflow](#) and exposing them in your community! Visual Workflow (also known as Flow) gives you a powerful tool to design wizard-like interactions for your customers and partners, and to automate repetitive tasks. This package provides you with a sample Flow (Register Product), a prebuilt community page that embeds that flow, and a utility class that makes using your flows in a community much easier.

This package is intended to provide an example of how you might use Flow within a community, as well as how to structure a Flow to work with Community Cloud users and data.

The screenshot shows a community page header with a search bar and navigation links (HOME, TOPICS, SUPPORT, COMMUNITY). Below the header is a section titled 'Register Your Product' with a sub-header 'Please take a moment to register your product with us. Registering provides you with faster support and issue resolution, proactive alerts, and an upgrade notifications.' The main form area is titled 'Register Product' and contains the following fields:

- *Choose Your Product: A dropdown menu with 'GenWatt Gasoline 300kW' selected.
- Purchase Date: A date picker showing 'Jan 2, 2018'.
- Serial Number: A text input field containing '3413414124123'.
- Description / Notes: A text area containing 'Front end generator'.
- Your Contact Information: A section showing 'Jack Rogers' and '(336) 222-7000'.

A 'Next' button is located at the bottom right of the form.

NOTE: This package is meant as an example, showing you how to use Flow in a community. It is not intended to be put into production, and is not officially supported by Salesforce. Use it to learn, and as a starting point for your deployment, but please work with your System Integrator or Salesforce Administrator to deploy a Flow in production.

Requirements

This package has a few requirements. If your sandbox meets these requirements, you might install there. Alternately, you might sign up for a free [Community Cloud Academy](#) org and install there.

Community Cloud	This package is designed to show you how to surface Visual Workflow in a community. Your org should have at least one Community Cloud license, and should have a Lightning Community defined and configured in it. The user you are installing with should have the ability to create & manage the community you intend to use. NOTE: Many companies are running the legacy Salesforce Customer Portal or Partner Portal, or may be running their community with Tabs & Visualforce
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	instead of Lightning templates. This package is designed to work with a Lightning Community running the Customer Service (Napili), Partner Central, Account Portal, or Build-Your-Own template.
Visual Workflow	The user you're installing as should have permissions to create & run flows.
Asset CRUD	Community users who will use this flow to register products should have the ability to create and edit Asset records.

Installation

Choose Your environment	This package is intended as a starter. We strongly recommend installing in a Developer Edition org, a sandbox connected to your production org, or a Community Cloud Academy org to familiarize yourself with the package first.
Check for Requirements	In order to install this package, your target org will need several items: - Your org must be Enterprise Edition, Unlimited Edition, or PxE. - Communities must be enabled in the org. NOTE: All orgs Enterprise and Above can enable and create communities after the Winter '18 release. In order to run and test the items in the package, you will need: - At least one community built on a Lightning template (such as Customer Service/Napili, Account Portal, Partner Central, or Build-Your-Own). Communities running on the legacy Tabs & Visualforce container will not be able to use the Flow component. - A community user created using a community cloud license (Customer Community, Customer Community Plus, Partner Community) and who is a member of the community you intend to test with.
Run the Installation Package	Run the installation package from the AppExchange.

What's in the Package

Once you install the package in your org, you will find it contains several important items:

Register_New_Product	Visual Workflow Definition	A basic sample flow that exposes screens for registering a product to a community user. Creates an Asset record related to the Contact of the currently-logged-in community user.
Get_Community_User_CRM_Data	Visual Workflow Definition	A utility flow that retrieves the User, Contact (if any), and Account (if any) records related to the currently logged-in user. Used by the Register New Product flow, but useful for ANY community flow situation.
Customer_Success_Register_New_Product	Lightning Page (Community)	A prebuilt community page template that contains the Flow component exposing this flow.

NOTE: When using the Register_New_Product flow, you may want to make a copy of it so you can continue to reference how the original was built.

Using the Package

Once you've installed the package, your org will have several helpful items in it that will illustrate how you can use Flow and Community. You can peruse the items included in the package as shown above, or you can take steps to set them up in your org.

Review the Flow

After installing the package, get into Setup and look at the Flow for reference. Under setup, navigate to **Process Automation** → **Flows** to review your list of flows. The sample flow will appear as **Register New Product**:

Flows

Visual Workflow lets you easily build and manage flows, which guide users through screens that collect and display records, and execute logic based on user input.

Administrators design and build flows using the Flow Designer's simple drag-and-drop user interface, then activate, active flow from a custom button, tab, link, or the flow URL.

To get started, click New Flow.

View:

All Flows

Edit | Create New View

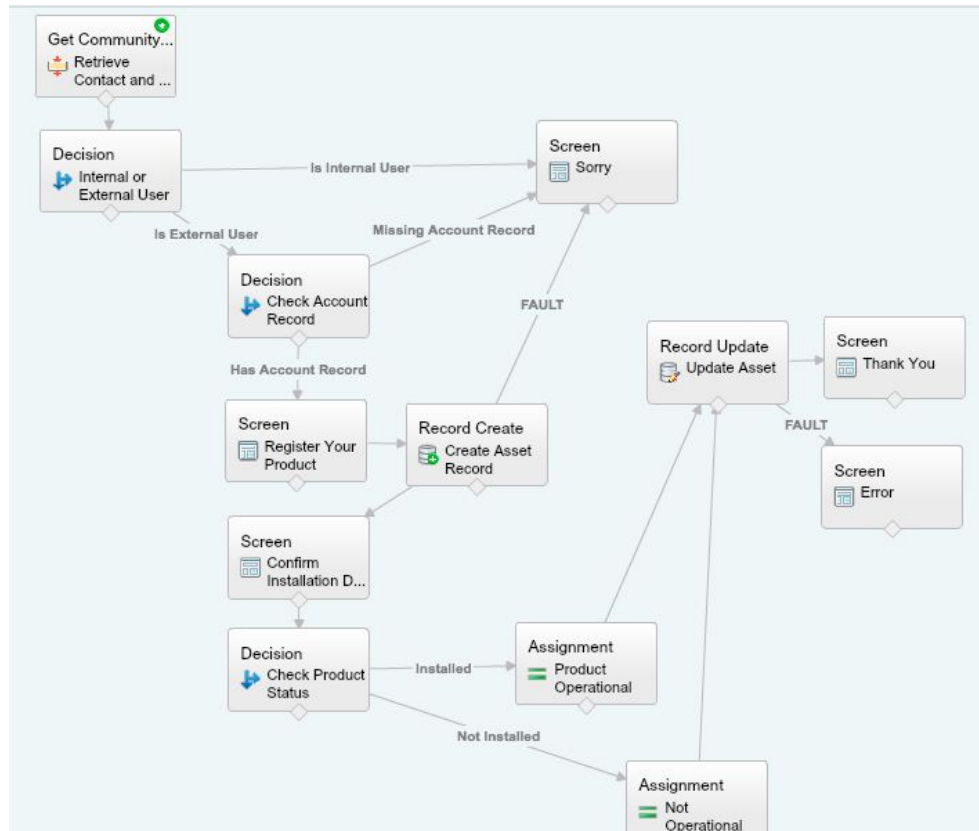
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O

Action	Flow Name ↑	Description
Open Edit	Get Community User CRM Data	Returns the User, Contact, and Account record of the currently logged-in Community user, if they exist.
Open Edit	Register New Product	SAMPLE: Allows a community user to register a product as an asset in the community.

You may want to:

- Open the flow designer to review how the flow is built, how it retrieves the community user, and how it creates Asset records.
- Activate the latest version of the Flow for use.

The Flow starts by retrieving the Contact and Account records of the person currently logged in to the community. It then makes several decisions on how to proceed, presenting screens to collect Asset information from the user, and then creates an Asset record connected to the user's Contact and Account record.



To learn more on how to use Flow Designer, refer to the **Important Resources** section below. It contains links to the Flow documentation.

NOTE: this flow is designed to run only for community end users, with associated Contact and Account records. The flow should detect when an internal (Sales Cloud, Service Cloud, Platform) license is being used and should give an appropriate error screen. So test with a community cloud user (External Identity, Customer Community, Customer Community Plus, Partner Community) as described below!

Spend some time inspecting how the Community User, Contact, Account, and Asset record are related and used in the Flow.

Create a Page in the Community of your Choice

In order to perform this step, you must have an active community running on a Lightning template. The package contains a prebuilt page template that surfaces the above flow to community end users. You can use Community Builder to create a page where your users will register their products. To create this page:

In Lightning Experience, enter setup, navigate to **Feature Settings → Communities → All Communities** to see the list of communities in your org.

Setup Home Object Manager

Q All Communities

Feature Settings

Communities

All Communities

Didn't find what you were looking for? Search all of Setup instead.

SETUP All Communities

Communities

The list shows all communities in your organization. Clicking on the URL takes you directly to the Community. If you're not a member, the URL isn't linked.

Maximum number of communities: 100

All Communities New Community

Action	Community Name	Description	URL
Workspaces Builder	Customer Success		https://flow-utilities-developer-edition.na73.force.com/success
Workspaces Builder	Partner Central		https://flow-utilities-developer-edition.na73.force.com

Enter Community Builder for the community you'd like to create the page in. We'll use the Customer Success community in our example. Create a new page in Community Builder:

Home

Pages

Find a page...

MY PAGES

- Register Product
- Sample Home Page

TEMPLATE PAGES

- Home
- Contact Support
- Create Record
- Error
- Feed Detail
- Messages
- Question Detail
- Search
- Topic Catalog
- Topic Detail
- User Settings
- + New Page

Template Header Top

Search... Search

CS SUPPORT COMMUNITY

Template Header Bottom

Headline

WELCOME!

A place where you can easily find solutions and ask questions

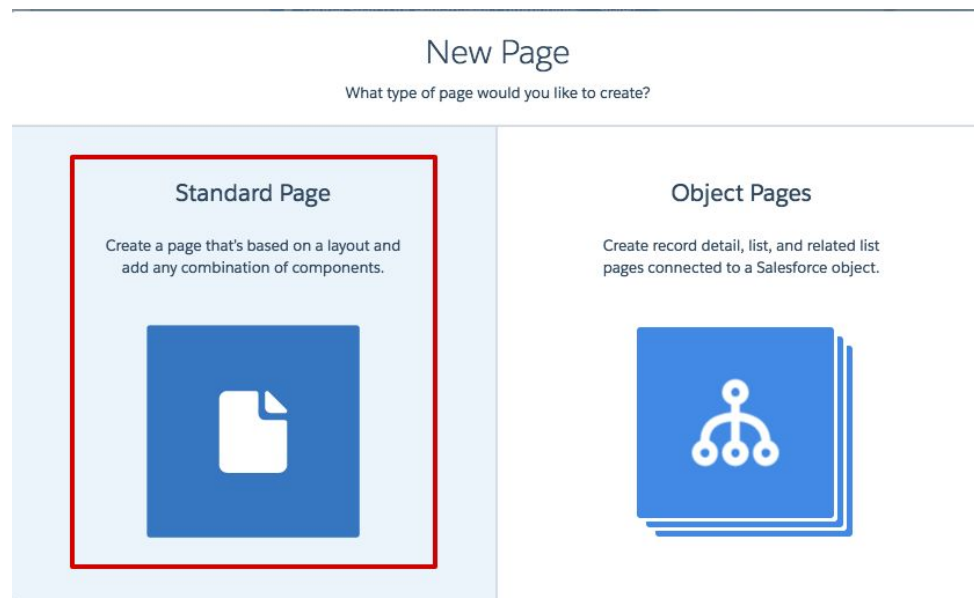
Content

Don't see what you're looking for?

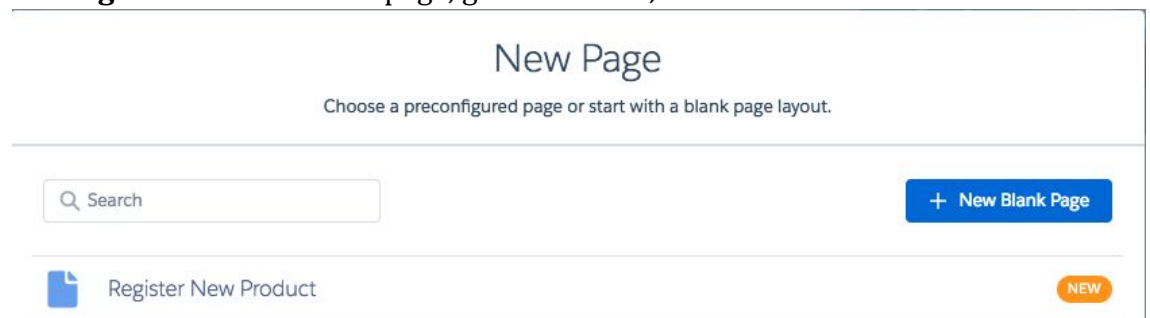
ASK A QUESTION CONTACT SUPPORT

Template Footer

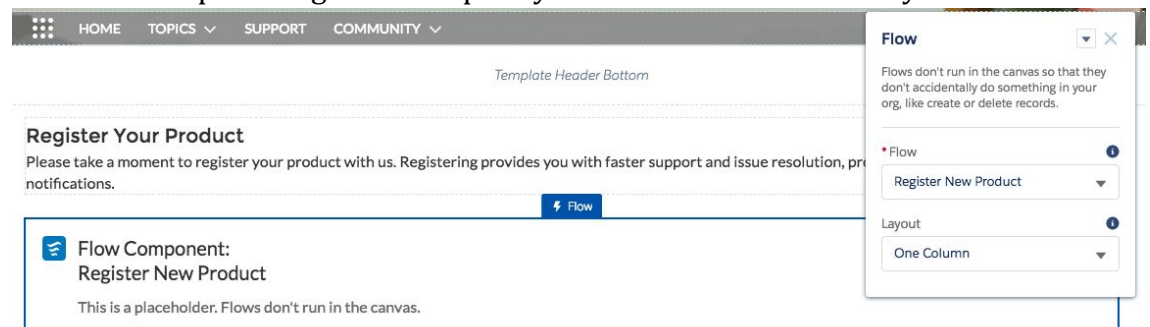
Choose a Standard Page:



You will be presented with a list of prebuilt pages to create your page from. Choose the **Register New Product** page, give it a name, and click Create:



You'll notice once the page is created that it has two components on it: a Rich Content component describing how to register products, and a Flow component that has been preconfigured to expose your Flow to the community:



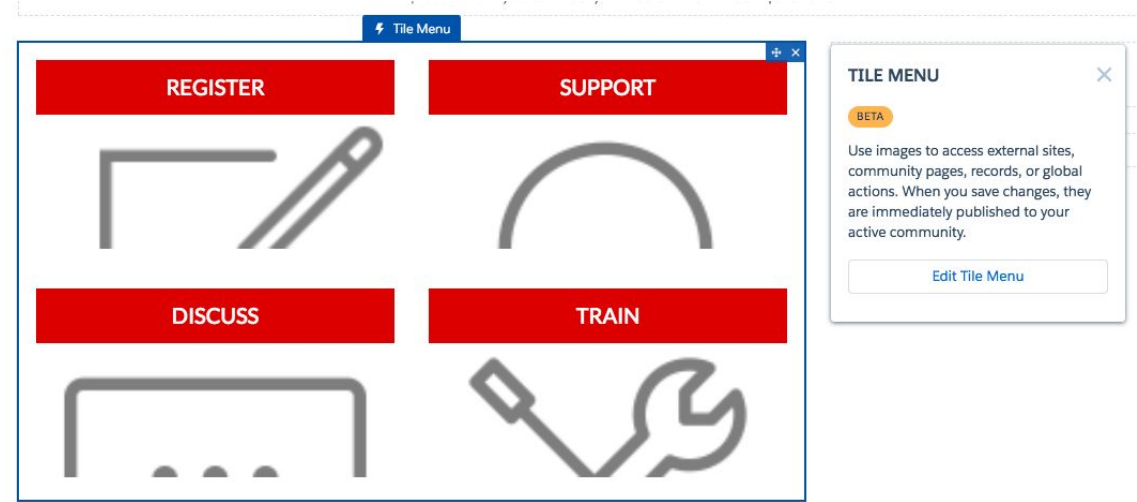
You should not need to play with the options on the component, but feel free to explore. Publish the page in Community Builder:



NOTE: Feel free to add other Lightning Components to the page to make the experience compelling for your community users.

OPTIONAL: In order to provide an easy way for Community users to navigate to register a product, you might place a link to it on your Community home page. The

Tile Menu component is ideal for this:



Read more on how to use the Tile Menu in the [Tile Menu documentation](#).

Test as a
Community User

This flow is designed to be run as a user with an external (External Identity, Customer Community, Customer Community Plus, Partner Community) license. You will need to have one of these users on hand in order to test. Make sure this user’s profile has the ability to see and create Asset records, and make sure all fields on the Asset object are visible to this user.

Log in to the community as the customer or partner user. Use the link you (optionally) created above to navigate to the flow page, then complete the flow steps. You will see how it collects information from the end user in a series of screens:

The screenshot shows a community interface with a navigation bar (HOME, TOPICS, SUPPORT, COMMUNITY) and a search bar. Below the navigation bar is a 'Register Your Product' section. It includes a sub-header 'Register Product' and a message: 'Please take a moment to register your product with us. Registering provides you with faster support and issue resolution, proactive alerts, and an upgrade notifications.' The form contains the following fields: a dropdown menu for '*Choose Your Product' (selected: GenWatt Gasoline 300kW), a date field for 'Purchase Date' (selected: Jan 2, 2018), a text field for 'Serial Number' (value: 3413414124123), and a text area for 'Description / Notes' (value: Front end generator). At the bottom, it shows 'Your Contact Information' (Jack Rogers, (336) 222-7000) and a red 'Next' button.

Once the flow is complete, an Asset record should be created on your community user's Contact and Account record, and any pictures you uploaded will be in the Files related list of the asset that was created:

NOTE: If your flow fails at any step, the cause is usually either Asset permissions or Field-Level Security for the user. Double check the profile, or see if this user can manually create assets via a Record List component in the community.

Important Resources

Trailhead: Visual Workflow	Basic learning module on using the Visual Workflow tool.
Visual Workflow Guide	Official documentation on the Visual Workflow studio.
Help & Training: Visual Workflow	Official Help & Training starter page on using Visual Workflow.
Help & Training: Community Cloud	Starting point for community cloud documentation.

