

Scan Anything - Opportunity Product Flow Template Setup



We include a Flow template - Scan Product from Opportunity. You can use this flow to Scan barcodes or QR codes on Product records and add them to the Opportunity-Product records. While this flow may work for your use case out-of-the-box. It is meant to be a template so you can save your own version adding functionality your org may require.

The flow uses the following settings:

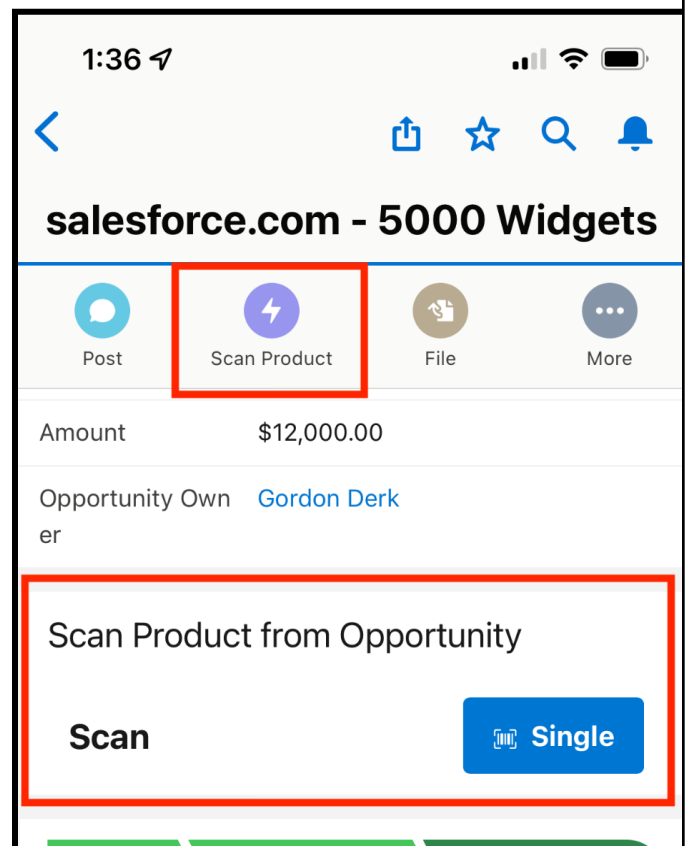
- The flow inherits the Opportunity from the record the user is on when they start the flow
- The scan flow component is set to Single scan operation
- The flow uses the Scanned barcode to equal the "Product SKU" which is the API field "StockKeepingUnit" to match the Product
- The flow attempts to find a price book for the Opportunity, if none exists the Standard Price book will be used
- The Flow prompts for Quantity and Sales Price (defaulted from List Price) after each scan, both fields are mandatory
- Records will be created in the Opportunity Product object

Important Note to Admins: If you use currency management - opportunity product records will be created with the user's default currency. If you require different logic you should save a copy and adjust the Flow.

You have two options for publishing this flow;
Quick Action or Lightning Page Flow.

Choose **one** of the two options detailed below.

The Quick Action will appear in the Button bar and the Flow will appear wherever you place it on the page.

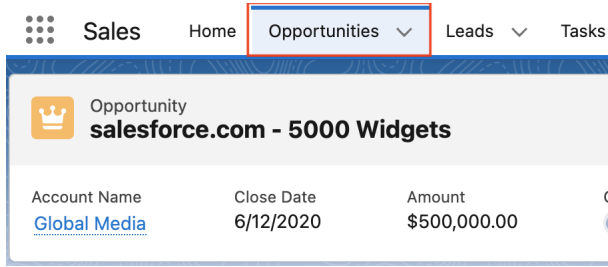
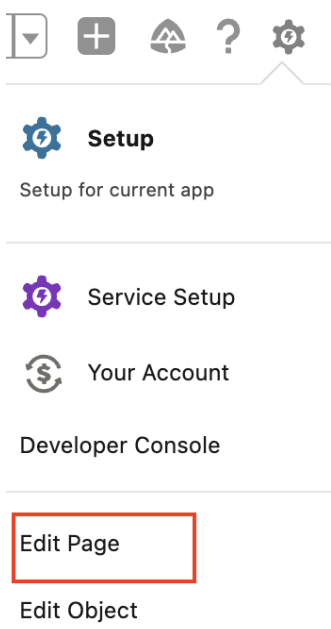
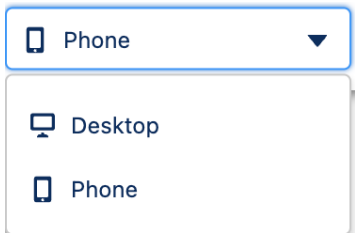


1. Setup the Scan Product from Opportunity flow on the Opportunity Page - Quick Action

- Navigate to Setup and the Object manager, select the Opportunity object.
- From the Details column select Page Layouts
- Choose the Layout you wish to add the Scan Product flow to
- In the Salesforce Mobile and Lightning Experience actions section add the Mobile & Lightning Action - Scan Product (you may need to click the *override the predefined actions* link)
- Save the Page Layout
- You must upgrade to Dynamic Actions to allow you to hide the Scan Product action on Desktop (it does not function)
- Once upgraded to Dynamic Actions go to the Lightning Page editor for your page and select the Highlights Panel
- Click the Scan Product Action and under Set Action Visibility
- Set the visibility filter to **Device - Form Factor - Equal - Phone**
- Save and Activate your page
- Assign Form Factor to Phone only

NOTE: If you create your own flow, you will need to create your own Quick Action button. You cannot re-assign the flow called by the managed Quick Action.

2. Setup the Scan Product from Opportunity flow on the Opportunity Page - **Lightning Page Flow**

Navigate to Opportunities	
Under the Gear Icon select Edit Page	
Change the Form factor selector to Phone	

Drag the Flow Component where you desire on the page

- 1. Under *Flow choose the **Scan Product from Opportunity**
- 2. click **Pass record ID into this variable**

PhoneShrink To ViewAnalyzeActivation...Save

Opportunity

salesforce.com - 5000 Widgets

Account NameGlobal Media

Close Date6/12/2020

Amount\$500,000.00

Opportunity OwnerGordon Derk

Flow Component: Scan Product from Opportunity

This is a placeholder. Flows don't run in the canvas.

Page > 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

Scan Product from Opportunity

Edit Flow in Flow Builder

Layout

One Column

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

recordId

{!Record.Id}

☒ Pass record ID into this variable

Set Component Visibility

Click Save and Activate as desired

Assign Form Factor for Phone only