

Enhancing Salesforce Flows with the Repeater Component: A Guide to Streamlined Data Collection

By Citrin Cooperman's Digital Services Practice

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For anyone needing to collect a dynamic list of information in **Salesforce**, new Repeater Component is an invaluable tool. This powerful feature allows users to easily add and duplicate sets of fields during Flow execution, making it simple to collect multiple entries—such as beneficiaries for an insurance policy—within a single screen.

What is the Repeater Component?

The Repeater Component enables designers to build screens in Screen Flows where users can add multiple instances of a predefined set of fields at runtime. For instance, if a Flow is intended to gather information about several beneficiaries, users can add as many entries as needed, with fields like First Name, Last Name, Date of Birth, and Relationship.

Key Benefits of the Repeater Component

The Repeater component offers several benefits, including dynamic field sets, which allow users to add, duplicate, or remove sets of fields at runtime. This functionality is ideal for cases where the number of entries—such as beneficiaries, products, or tasks—is not fixed. It also simplifies data collection by letting users input multiple items of the same type without needing to navigate between screens. Additionally, after users enter their data, they can loop through the entries and save them as variables for further use, such as creating records or performing actions within the Flow.

How to Use the Repeater Component in Flow Builder

To start using the Repeater Component, create a screen flow in Flow Builder, add a Screen Element, and drag the Repeater Component onto the screen. Next, configure the fields to be repeated, such as adding Text, Date, and Picklist components to collect beneficiary details. Once data is collected, use a Loop element to process the entries, allowing, for instance, each beneficiary's details to be saved as a Contact record.

Configuration Options

The Repeater Component is highly customizable, allowing for prepopulated items from a collection that users can edit or remove, visibility logic to control when it appears based on certain criteria, and options for users to manually add or remove repeated fields.

Important Considerations

While the Repeater Component greatly enhances flexibility, it has a few limitations: it does not support elements like Transform, Collection Filter, or Collection Sort; it cannot reference outputs from one Repeater inside another; and some components, like Choice, are not reactive within a Repeater. Nevertheless, with thoughtful design, it can significantly boost a Flow's usability, enabling streamlined data collection and user-friendly screens that adapt to user needs.

For those looking to maximize their use of the Repeater Component, Citrin Cooperman's **Digital Services Practice** Salesforce professionals offer professional guidance and customization support, helping teams design Flows that fully leverage this component to enhance data collection efficiency and user experience.

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