

Salesforce Flows Cheatsheet

Automation Made Easy - Flow Builder Reference Guide

Flow Types

Flow Type	Trigger	Use Case	Interview Type
Screen Flow	User initiates	Guided visual experience, wizards	One interview per user
Record-Triggered Flow	Record changes	Automate on create/update/delete	One per triggering record
Schedule-Triggered Flow	Time-based	Batch operations, daily/weekly tasks	One per scheduled batch
Autolaunched Flow	Called by other automation	Reusable subflows, invocable actions	One per invocation
Platform Event Flow	Platform event received	Event-driven integration	One per event

Record-Triggered Flow Options

Trigger Timing

- Before Save** - Fast field updates on same record
- After Save** - Related records, callouts, emails

Trigger Events

- Created** - New record
- Updated** - Modified record
- Created or Updated** - Either
- Deleted** - Record removed

Best Practice: Use Before Save for same-record field updates. Use After Save for related record updates, sending emails, or making callouts.

Flow Elements

Logic Elements

- Assignment
- Decision
- Loop
- Collection Sort
- Collection Filter

Data Elements

- Get Records
- Create Records
- Update Records
- Delete Records
- Roll Back Records

Interaction Elements

- Screen
- Action
- Subflow
- Send Email
- Post to Chatter

Screen Components

Component	Purpose	Input/Output
Text	Display static text	Output only
Display Text	Display dynamic text with merge fields	Output only
Text Box	Single-line text input	Input
Long Text Area	Multi-line text input	Input
Number	Numeric input	Input
Checkbox	Boolean choice	Input
Radio Buttons	Single selection from choices	Input
Picklist	Dropdown selection	Input
Date	Date picker	Input
File Upload	Upload files	Input
Data Table	Display collection of records	Output/Selection

Variable Types

Type	Description	Example
Variable	Single value storage	accountName (Text)
Record Variable	Single record with fields	myAccount (Account)
Collection Variable	List of primitive values	accountIds (Text Collection)
Record Collection	List of records	accountList (Account Collection)
Constant	Unchangeable value	TAX_RATE = 0.08
Formula	Calculated value	Total = Price * Quantity

Decision Element Operators

Comparison Operators

- **Equals** - Exact match
- **Does Not Equal** - Not equal
- **Greater Than** - Larger value
- **Less Than** - Smaller value
- **Greater or Equal** - \geq comparison
- **Less or Equal** - \leq comparison

Special Operators

- **Contains** - Substring match
- **Starts With** - Prefix match
- **Ends With** - Suffix match
- **Is Null** - Empty/null check
- **Is Changed** - Field modified (triggers only)
- **Was Set** - New value assigned (triggers)

Loop Element

Loop Through Collection

- Iterate through each item in a collection
- Access current item via loop variable
- Perform operations on each item
- Can nest loops (avoid excessive nesting)

Warning: Be mindful of governor limits when looping. Each DML operation inside a loop counts toward limits. Consider bulkification.

Assignment Element

Assignment Operations

- **Equals** - Set value
- **Add** - Numeric addition or add to collection
- **Subtract** - Numeric subtraction
- **Multiply** - Numeric multiplication
- **Divide** - Numeric division
- **Remove** - Remove from collection

Get Records Element

Option	Description
Object	Choose which object to query
Filter Conditions	WHERE clause conditions
How Many Records	One record, All records, or specify number
Sort Order	ORDER BY field ascending/descending
When No Records	Continue or treat as error
Store Result	Save to record variable or collection

Tip: Always use selective filters and limit record retrieval to improve performance.

Create/Update Records

Create Records

- Single record or collection
- Set field values individually
- Can use record variables
- Roll back on error option

Update Records

- Modify existing records
- Must have record ID
- Update specific fields
- Supports bulk updates

Subflows

Benefits of Subflows

- Reusable logic across multiple flows
- Modular design for better maintainability
- Pass input variables to subflow
- Receive output variables from subflow
- Reduce complexity of main flow

Best Practice: Create subflows for common processes like sending notifications, calculating values, or validating data.

Flow Governor Limits

Resource	Limit Per Transaction
SOQL Queries	100
Records Retrieved by SOQL	50,000
DML Statements	150
Records Processed by DML	10,000
Total Heap Size	6 MB (Synchronous) / 12 MB (Async)
CPU Time	10,000 ms (Sync) / 60,000 ms (Async)
Actions per Flow	2,000

Important: Schedule-triggered flows process in batches of 200 records. Each batch counts against governor limits separately.

Flow Best Practices

- **One Flow Per Object Per Event:** Consolidate triggers into single flow per object
- **Use Before-Save:** For same-record field updates to avoid additional DML
- **Bulkify:** Query and update records in collections, not loops
- **Error Handling:** Add fault paths to handle errors gracefully
- **Test Thoroughly:** Debug with different data scenarios
- **Use Descriptions:** Document your flow logic and elements
- **Optimize Queries:** Use filters and limit records retrieved
- **Version Control:** Create new versions for major changes
- **Deactivate Old Flows:** Remove obsolete automation
- **Monitor Performance:** Check flow execution in Setup

Flow Debugging

Debug Options

- Click Debug button in Flow Builder
- Set input variable values
- Step through flow execution
- View variable values at each step

Troubleshooting Tools

- Debug Logs
- Flow Error Emails
- Process Automation Settings
- Flow Trigger Explorer

Formula Functions (Common)

Function	Description	Example
ISBLANK()	Check if field is empty	ISBLANK({!AccountName})
IF()	Conditional logic	IF({!Amount} > 1000, "Large", "Small")
TODAY()	Current date	TODAY() + 7
NOW()	Current date/time	NOW()
TEXT()	Convert to text	TEXT({!Amount})
VALUE()	Convert to number	VALUE({!StringAmount})
CONTAINS()	Check if text contains string	CONTAINS({!Name}, "Corp")