

# Flow Data Table

by Tigerface Systems, LLC

## Technical Overview



Document Version 2.0

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# 1 Introduction

## 1.1 Product Description

The Flow Data Table is an AppExchange product which allows Salesforce customers to display lists of records in table format with Flow Builder.

## 1.2 Document Purpose

This document provides a high-level technical overview of this product to get the reader familiar with the product's general capabilities. This document does not provide detailed product setup or configuration instructions.

For additional product information, including overviews and tutorials, click the following link: <https://tigerfacesystems.com/products/flow-data-table/summary>

## 1.3 Required Knowledge

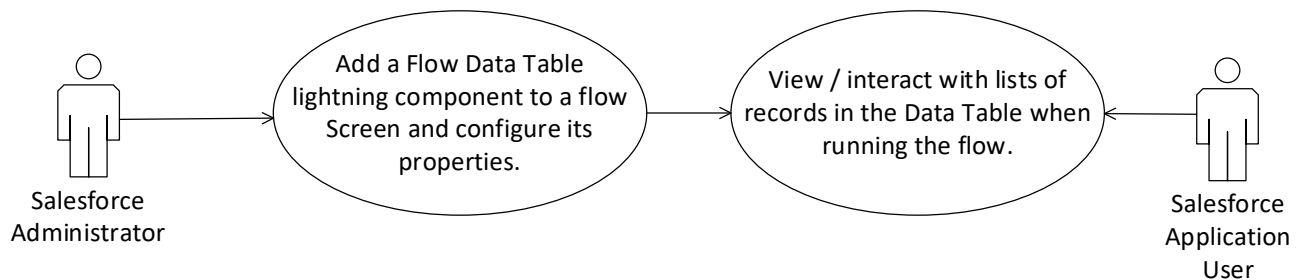
This document assumes the reader is proficient with the Salesforce Flow Builder tool. We recommend you complete this Trailhead course:

<https://trailhead.salesforce.com/en/content/learn/trails/build-flows-with-flow-builder>

## 2 Product Setup Overview

### 2.1 Setup Steps

When a subscriber installs the Flow Data Table managed package, they will configure the Flow Data Table as depicted in the following diagram.



**Figure 1: Flow Data Table Setup**

The following sections in this document will provide additional information on the steps depicted in the above diagram.

## 2.2 Flow Builder Configuration

The following diagram depicts the architecture associated with configuring a data table for Flow Builder:

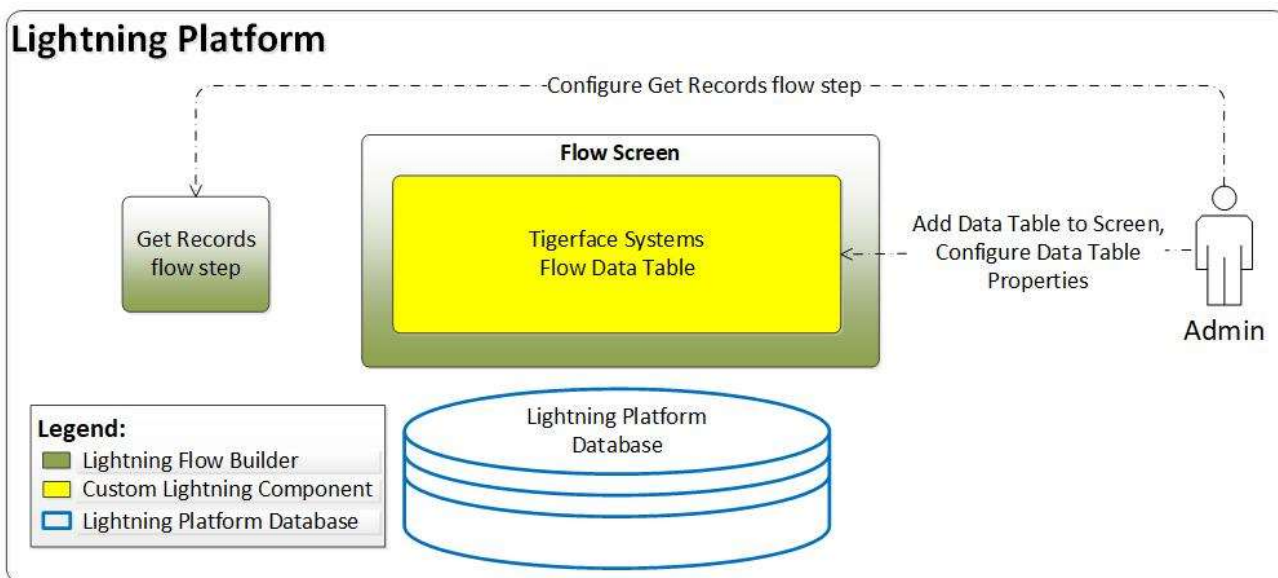


Figure 2: Data Table Configuration

### Configuration Step Descriptions

- **Configure Get Records** - A Salesforce administrator will configure a Get Records step within Flow Builder. The Get Records step will read a set of records from the Salesforce database when the flow is run. The Get Records step will store the records in a record list variable, which is passed to the flow data table at run time.
- **Add Data Table to Screen** – The administrator will drag the Flow Data Table lightning component from the toolbox onto the Flow Screen. The data table's properties, such as the record list and fields to display, will be configured.

**NOTE: The table will only be visible in the Flow Builder toolbox during the configuration of a Screen flow step; the table will not appear in the Flow Builder toolbox otherwise.**

## 3 Run Time Overview

### 3.1 Read Only Table

The Free version of the data table presents data in a read only format, allowing users to view visually appealing data when running the flow. The following diagram depicts the read only run time architecture:

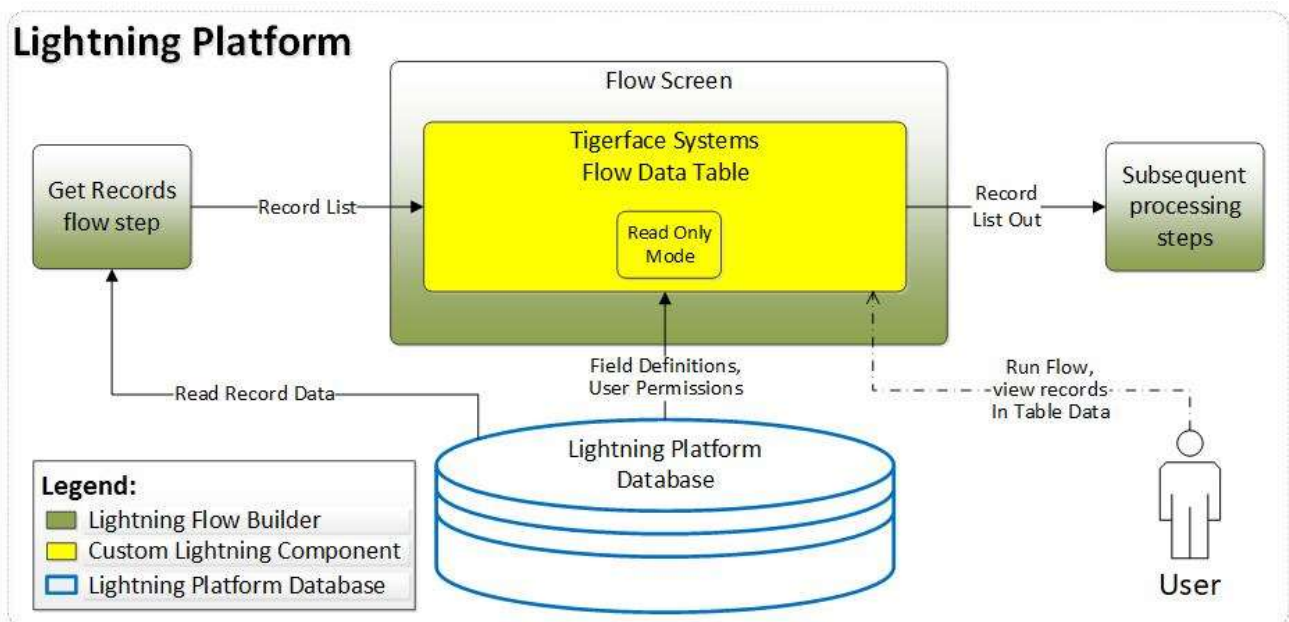


Figure 3: Read Only Table

The following processing steps will occur when the flow is run:

1. The Get Records step will retrieve record data from the Salesforce database. The record data will be stored into a record list variable and passed to the data table. Note that Get Records will enforce object, record, and field level security at run time.
2. The data table receives the record list, retrieves the user permissions and field definitions from the Salesforce database, and displays the fields for each record. Note that if the user does not have access to the field, that field will not be displayed in the data table.
3. The user will view the record data in table format on the flow screen.
4. Subsequent processing steps in the flow may be configured.

### 3.2 Sort and Select Table

The Pro version of the data table adds the capability for the user to sort by table columns and select one or more records in the list. The following diagram depicts this architecture:

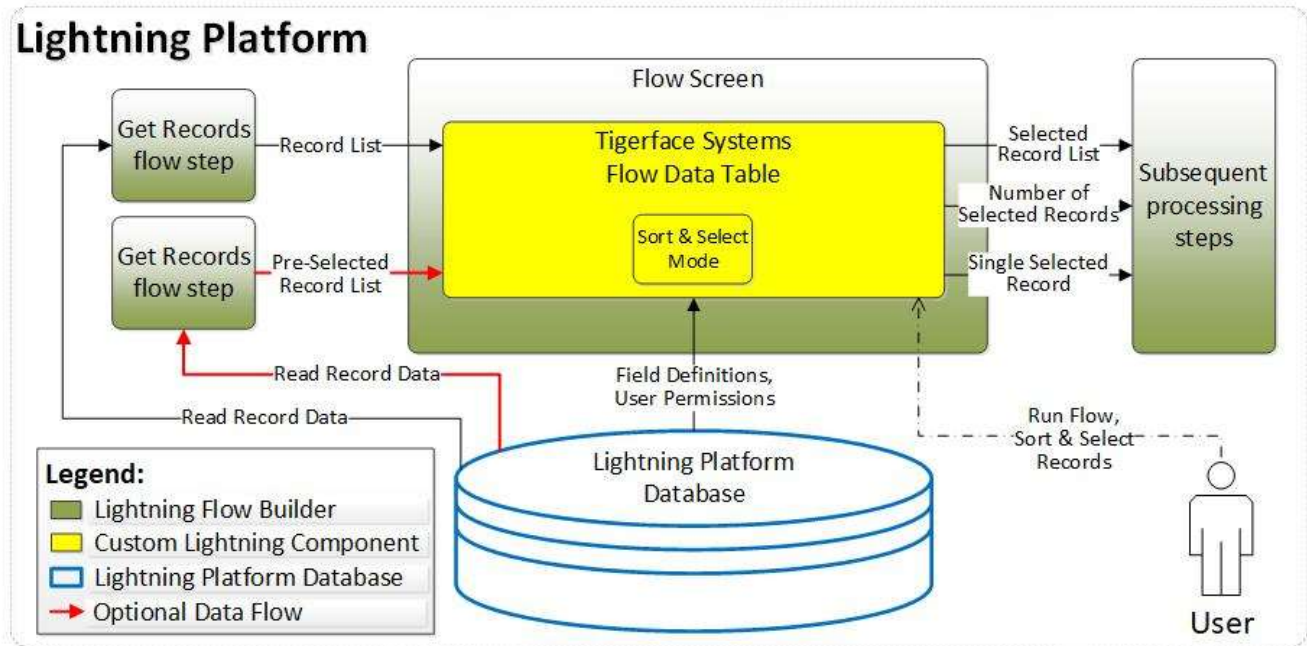


Figure 4: Sort and Select

The following processing steps will occur when the flow is run:

1. The Get Records step will retrieve record data from the Salesforce database. The record data will be stored into a record list variable and passed to the data table.
2. (Optional) Records can be read and stored into a second record list variable in order to cause one or more records to be pre-selected.
3. The data table receives the record list, retrieves the field definitions and user permissions from the Salesforce database, and displays the fields for each record.
4. The user can sort the records by column and select one or more records.
5. The selected records are available in a record list variable for subsequent flow processing.
6. The number of selected records is available in a variable for subsequent processing.
7. If the user selected one record it will be available in an object variable for subsequent processing. This variable will be empty otherwise.

### 3.3 In Memory Edit

The Ultimate version of the data table adds the capability for the user to edit the records that are presented in the data table. In this mode, the data table does not write the records to the Salesforce database. The following diagram depicts this architecture:

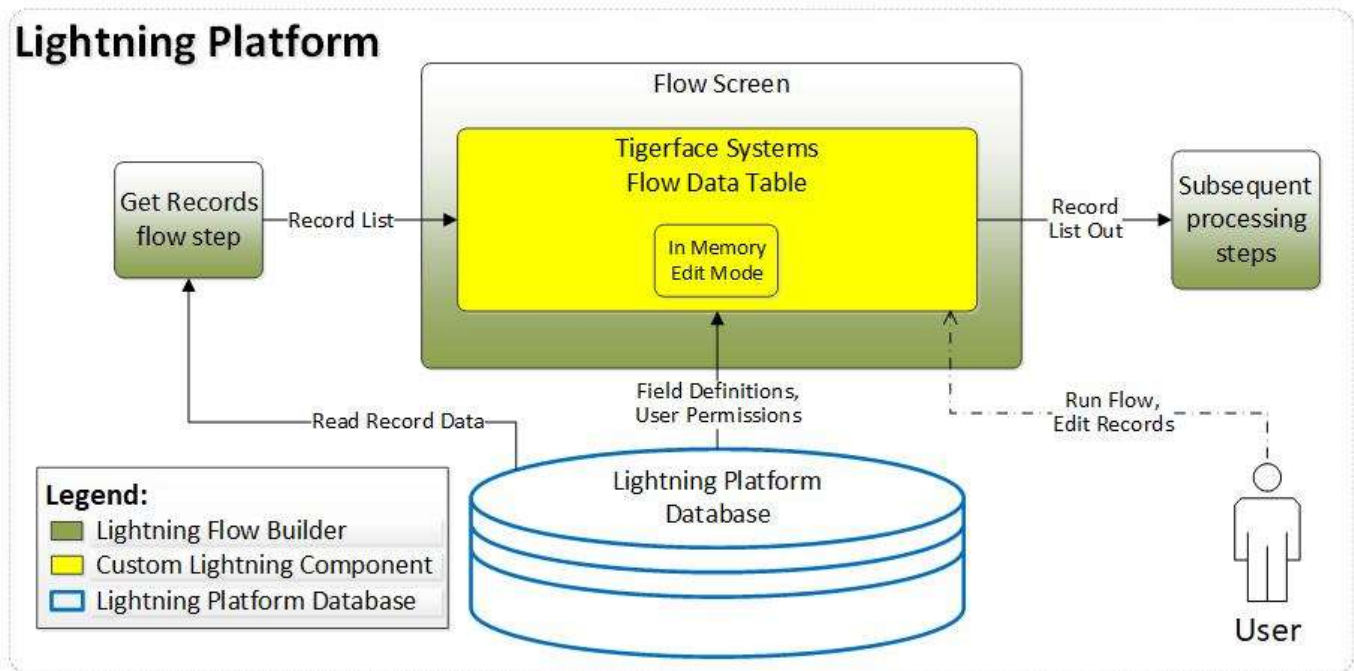


Figure 5: In Memory Edit

The following processing steps will occur when the flow is run:

1. The Get Records step will retrieve record data from the Salesforce database. The record data will be stored into a record list variable and passed to the data table.
2. The data table receives the record list, retrieves the field definitions and user permissions from the Salesforce database, and displays the fields for each record.
3. The user can edit the records in the data table. When the user clicks the Save button after editing, the changes will be written to the Record List Out variable. The records are not written to the Salesforce database when the data table operates in this mode. **Note that the data table will only enable the edit feature if the user has edit privileges for the object. Field Level Security is also enforced by the data table.**
4. The edited records are available in Record List Out for subsequent flow processing.



### 3.4 Real Time Database Edit

The Ultimate version of the data table adds the capability for the user to edit the records and store those changes to the Salesforce database real time. The following diagram depicts this architecture:

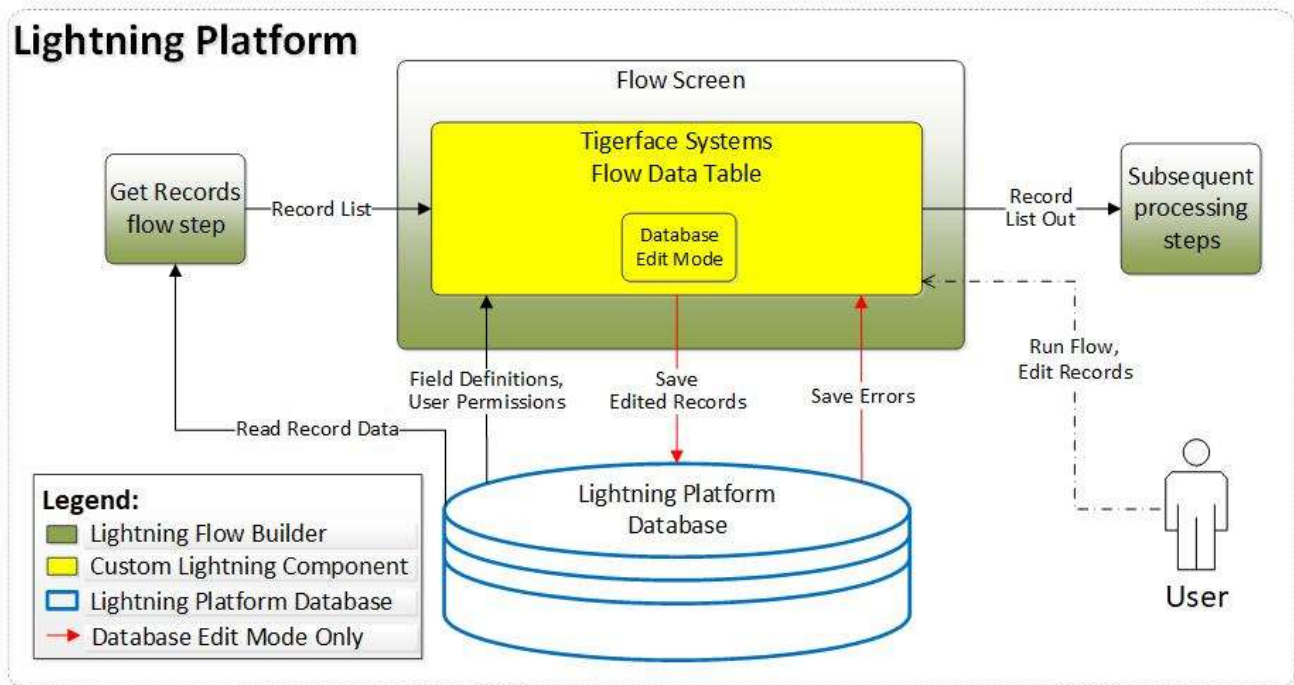


Figure 6: Real Time Database Edit

The following processing steps will occur when the flow is run:

1. The Get Records step will retrieve record data from the Salesforce database. The record data will be stored into a record list variable and passed to the data table.
2. The data table receives the record list, retrieves the field definitions and user permissions from the Salesforce database, and displays the fields for each record.
3. The user can edit the records in the data table. When the user clicks the Save button, the edited records are sent to the Salesforce database. Records without errors will be written to the database. Records with errors will be rejected, and error messages will be displayed to the user.  
**Note that the data table will only enable the edit feature if the user has edit privileges for the object. Field Level Security is also enforced by the data table.**
4. The edited records are available in Record List Out for subsequent flow processing.



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*by Tigerface Systems, LLC*

## **4 About Tigerface Systems, LLC**

Tigerface Systems is a custom software development company based in the suburbs of Maryland, USA. We specialize in custom Salesforce solutions that are marketed and sold on the Salesforce AppExchange. We are a private, family-owned and operated company. We do all work in-house to ensure the utmost highest quality is engineered from the beginning and maintained throughout our product's lifecycle.