

#### Phase 4: Process Automation (Admin)

This phase delivered the core automation logic for the entire Lost & Found Portal, replacing the inefficient manual process with two dedicated **Record-Triggered Flows**. The decision was made to consolidate all automation into **Flow Builder**, adhering to Salesforce best practices for maintainability and performance, and intentionally excluding legacy tools like Workflow Rules and Process Builder.

Concept	Project Goal
<b>Automation Strategy</b>	To eliminate the manual cross-referencing of Lost and Found records by automatically generating a <b>Verification Case</b> upon a potential match and routing it to the correct work queue.

#### 4.1 Flow 1: Match Identification and Case Creation (Core Automation)

This Flow is the engine of the portal, responsible for identifying a potential match and creating the actionable record for the Security Staff.

Detail	Configuration	Impact
<b>Flow Name</b>	Auto_Create_Verification_Case_on_Found_Item	Clear, descriptive naming convention.
<b>Trigger</b>	<b>Record-Triggered Flow</b> (After Save)	Fires immediately <i>after</i> a new <b>Found Item</b> is successfully saved to the database.
<b>Entry Criteria</b>	Run when <b>Found_Item__c</b> is <b>Is New</b> (\$Record.IsNew = TRUE).	Ensures the automation only runs once

Detail	Configuration	Impact
		per new submission.
<b>Matching Logic (Get Records)</b>	The Flow executes a Get Records on the <b>Lost Item</b> object using filtering criteria that align item features (e.g., Category__c equals the new Found_Item__c.Category__c).	Efficiently queries the database for one or more <b>Lost Items</b> that align with the newly reported <b>Found Item</b> .
<b>Action</b>	<b>Create Records</b> Element	If the Get Records step returns one or more results (i.e., a match is found), the Flow creates a new <b>Case</b> record.
<b>Field Mapping</b>	The new Case is populated with: <b>Status = New</b> , <b>OwnerId</b> temporarily set, <b>Related_Lost_Item__c</b> linked to the retrieved match record, and <b>Related_Found_Item__c</b> linked to the triggering Found Item record.	Establishes the three-way link that defines the match and prepares the record for the next step (Phase 4.2).

## 4.2 Flow 2: Case Assignment and Routing

This Flow ensures that the Case created by Flow 1 is immediately routed to the correct department's queue, preventing work from stalling. This Flow demonstrates the strategic use

of an **Invocable Apex Action** (developed in Phase 5) to overcome a standard Flow limitation.

Detail	Configuration	Purpose
<b>Flow Name</b>	Assign_Verification_Case_to_Queue	Centralizes all new match assignments.
<b>Trigger</b>	<b>Record-Triggered Flow</b> (After Save)	Fires immediately <i>after</i> a new <b>Case</b> record is created (by Flow 1).
<b>Entry Criteria</b>	Run when <b>Case</b> is <b>Is New</b> and <b>RecordType.Name</b> equals "Verification Case".	Limits the Flow to only new, relevant Cases.
<b>Queue ID Retrieval</b>	<b>Action Element (Apex):</b> Calls the <b>QueueTools.getQueueId</b> Invocable Apex Action (Phase 5).	Retrieves the necessary <b>Verification Queue ID</b> , which Flow cannot do reliably using standard components.
<b>Final Action</b>	<b>Update Records:</b> Sets the Case <b>OwnerId</b> to the Queue ID returned by the Apex Action.	Instantly routes the case to the <b>Verification Queue</b> , creating the centralized work queue for the Security Staff.

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### 4.3 Automation Flow Canvas

To fully document the administrative automation, the main flow canvas showing the two linked processes is required.

Select Elements

Auto-Layout

Last saved on 9/25/2025, 02:59 PMActiveRunDebugView TestsSave As New VersionSaveDeactivate

Record-Triggered Flow

Start

Object: Verification Case

Trigger: A record is created

Optimize for: Actions and Related Recor...

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Verific...

Run Immediately

Assign Verification Case t...

Apex Action

End

Get Queue ID

\* Label

Assign Verification Case to Queue

\* API Name

Assign\_Verification\_Case\_to\_Queue

Description

Use values from earlier in the flow to set the inputs for the "Get Queue ID" Apex action. To use its outputs later in the flow, store them in variables.

Set Input Values

A<sub>3</sub> queueDeveloperNames

Verification\_Queue

Included

View Output Resources

View the automatic output resources for the selected element. If you don't want to use this element's automatic output, you can manually assign variables to store the element's output.

A<sub>3</sub> output

Manually assign variables (advanced)

Show advanced options