

Phase 7: Automation Using Flow Builder

Visitor Management System – Salesforce CRM Project

7.1 Objective

The goal of Phase 7 is to automate the Visitor Check-In and Check-Out process using Salesforce Flow Builder.

This phase reduces manual work and ensures:

- ✓ Automatic timestamping
- ✓ Error-free data entry
- ✓ Faster visitor processing
- ✓ Improved data consistency

7.2 Types of Automation Built in Phase 7

You will create two flows:

1. Auto Assign Check-In Time (Record-Triggered Flow)
2. Auto Assign Check-Out Time (Record-Triggered Flow)

7.3 Flow 1: Auto Assign Check-In Time

7.3.1 Purpose

Automatically populate Check-In Time when a new Visitor record is created.

7.3.2 Steps to Create the Flow

Step 1: Create Record-Triggered Flow

- Go to Setup → Flow
- Click New Flow
- Select Record-Triggered Flow
- Object: Visitor
- Trigger: When a record is created

- Condition: None

Step 2: Add Assignment Element

- Click the + icon
- Select Assignment

Fill details:

Field	Value
Label	Assign Check-In Time
Variable	\$Record.Check_In_Time_c
Operator	Equals
Value	\$Flow.CurrentDateTime

Save.

The screenshot displays the Salesforce Flow Builder interface. On the left, the flow canvas shows a 'Record-Triggered Flow' start element, followed by an 'Assignment' element labeled 'Set Check-In Time', and an 'End' element. The 'Assignment' element is highlighted with a blue border. On the right, the 'Assignment' configuration panel is open, showing the following details:

- Label:** Set Check-In Time
- API Name:** Set_Check_In_Time
- Description:** (Empty text area)
- Set Variable Values:**
 - Each variable is modified by the operator and value combination.
 - Variable:** ...ering Visitor_c > Check-In Time
 - Operator:** Equals
 - Value:** ...low Interview > CurrentDateTime
- + Add Assignment** button

The top of the interface shows the 'Flow Builder' tab, the flow name 'Auto Check-In Time - V1', and various action buttons like 'Run', 'Debug', 'View Tests', 'Save As New Version', 'Save', and 'Deactivate'. The status bar at the bottom indicates 'Last saved on 12/9/2025, 07:29 PM'.

Step 3: Connect & Save Flow

- Connect Start → Assignment
- Click Activate

7.4 Flow 2: Auto Assign Check-Out Time

7.4.1 Purpose

Automatically populate Check-Out Time when the visitor status is updated to "Checked Out".

7.4.2 Steps

Step 1: Create Record-Triggered Flow

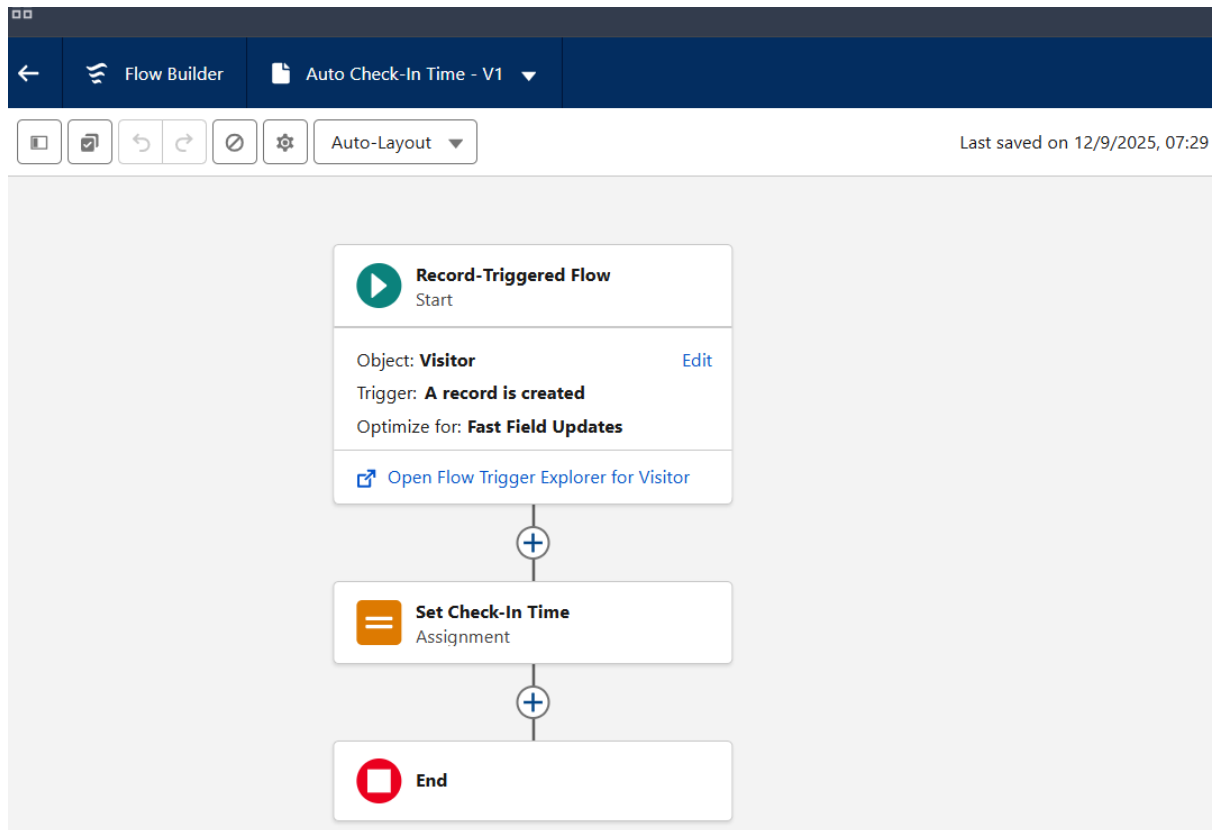
- New Flow → Record-Triggered
- Object: Visitor
- Trigger: When record is updated
- Condition:
 - Status Equals "Checked Out"

Step 2: Add Assignment Element

- Label: Assign Check-Out Time
- Variable / Resource: \$Record.Check_Out_Time__c
- Operator: Equals
- Value: \$Flow.CurrentDateTime

Step 3: Save & Activate

- Connect elements
- Activate the flow



7.5 Testing the Flows

Test Check-In Flow

1. Go to Visitor Tab
2. Click New
3. Enter visitor details
4. Save

☞ Check-In Time should automatically fill.

Test Check-Out Flow

1. Open an existing visitor record
2. Change Status → Checked Out
3. Save

☞ Check-Out Time should be automatically filled.

7.6 Summary of Phase 7

In this phase, we automated key operations:

- ✓ Auto Check-In timestamp
- ✓ Auto Check-Out timestamp
- ✓ Reduced manual work
- ✓ Improved data accuracy
- ✓ Enhanced operational efficiency

Your Visitor Management System is now more intelligent and automated.