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
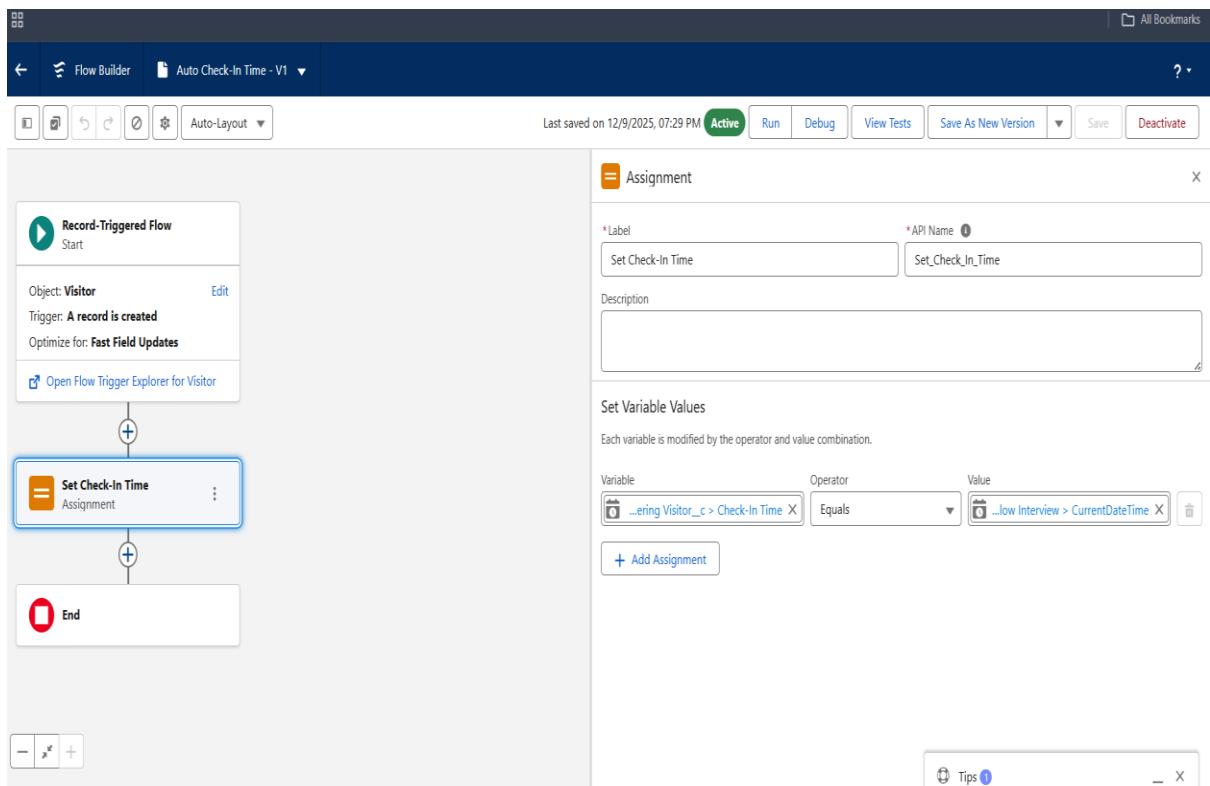
Step 2: Add Assignment Element

- 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.

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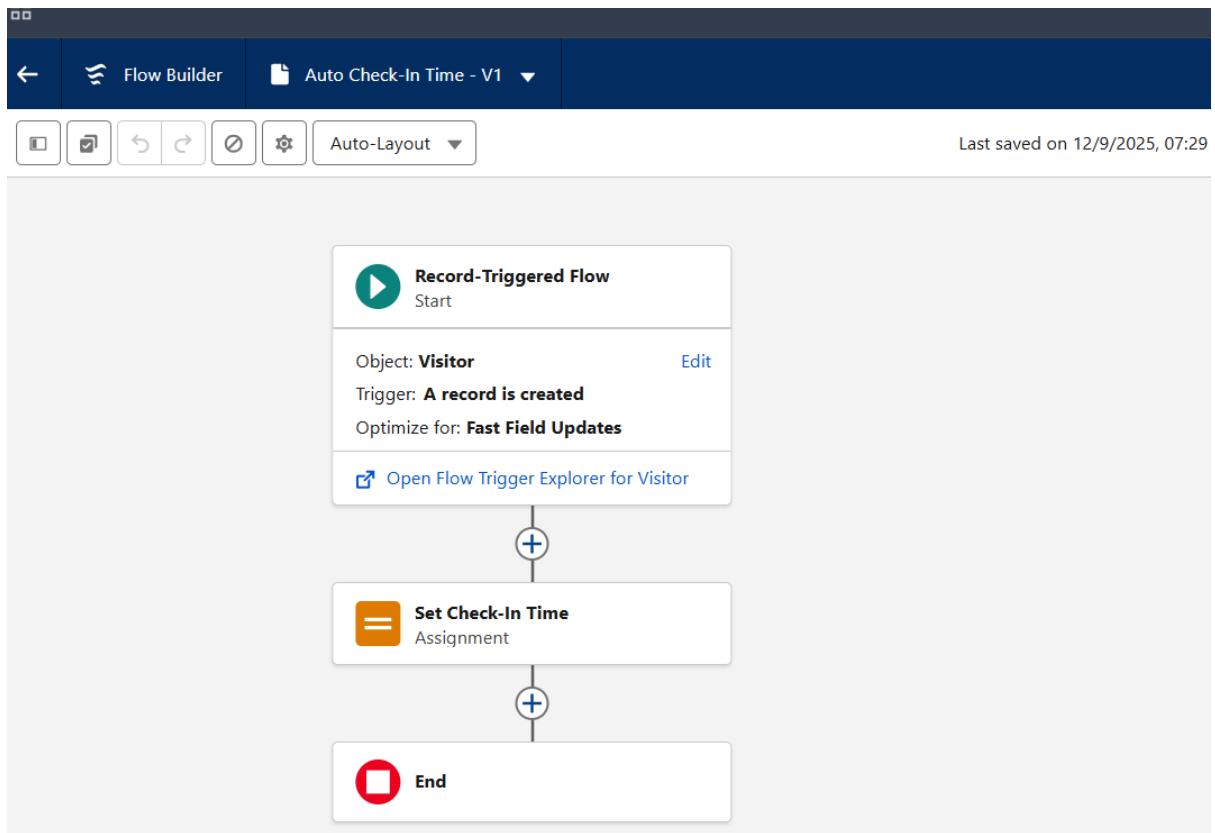
- New Flow → Record-Triggered
- Object: Visitor
- Trigger: When record is updated
- Condition:
  - Status Equals "Checked Out"

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.