

Phase 4: Process Automation (Admin) – Loyalty Points & Tier Automation Flow

Objective

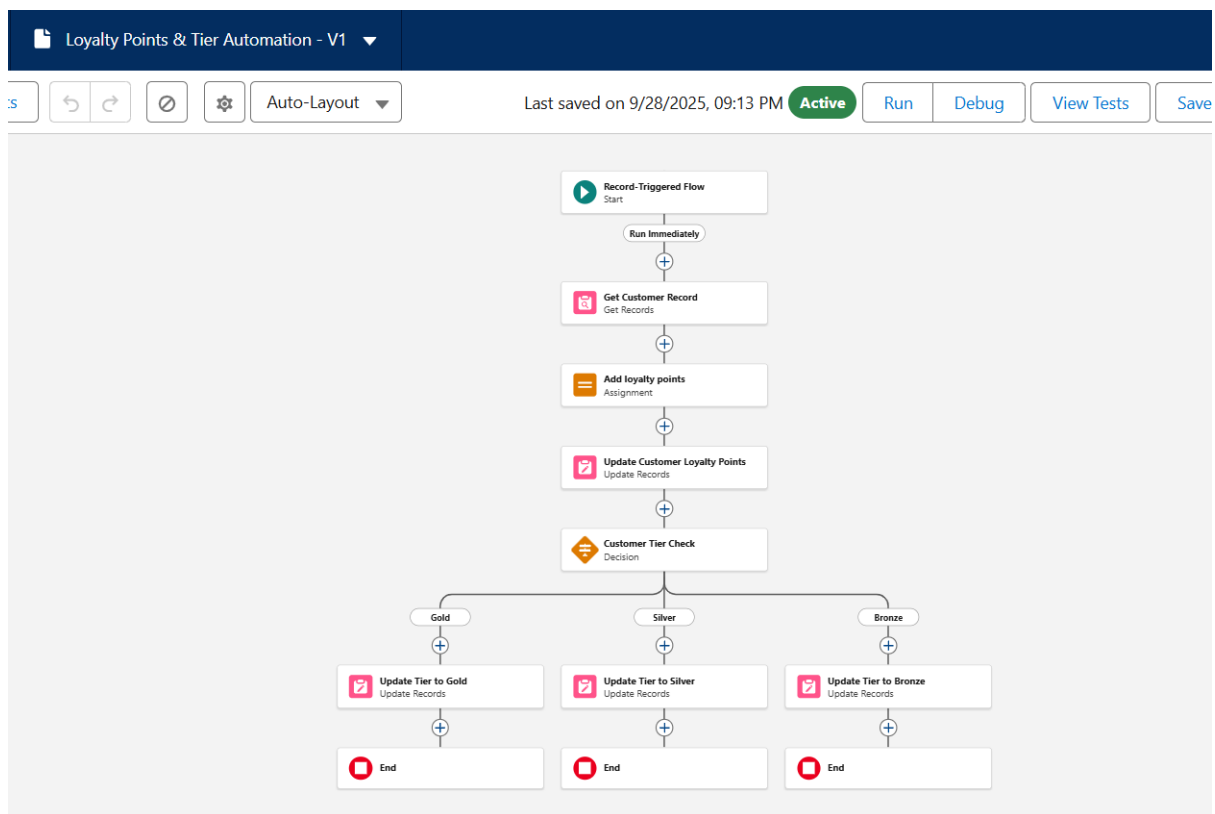
The purpose is to automate loyalty points calculation in the Smart Retail Customer Insights Tracker. Whenever a Purchase is made, the system automatically updates Customer Loyalty Points and applies tier-specific logic based on Bronze, Silver, or Gold tiers.

Automation Tool Used

Salesforce Flow (Record-Triggered Flow)

- Triggered when a Purchase__c record is created or updated.
- Uses Decision element to determine the customer tier.
- Updates Customer__c records via Assignment and Update Records elements.

Full Flow Layout



Steps Taken to Build the Flow

1. Create Record-Triggered Flow

- Open Flow Builder.
- Selected Record-Triggered Flow on the Purchase__c object.

- Configured it to trigger when a record is created or updated.

The screenshot shows the Salesforce Flow Builder interface. On the left, a canvas displays a flow starting with a 'Record-Triggered Flow' element, followed by a 'Run Immediately' connector, and then a 'Get Customer Record' element. On the right, the 'Configure Start' panel is open. It shows the 'Select Object' as 'Purchase' and the 'Configure Trigger' section where 'A record is created or updated' is selected. Below this, the 'Set Entry Conditions' section is visible but empty.

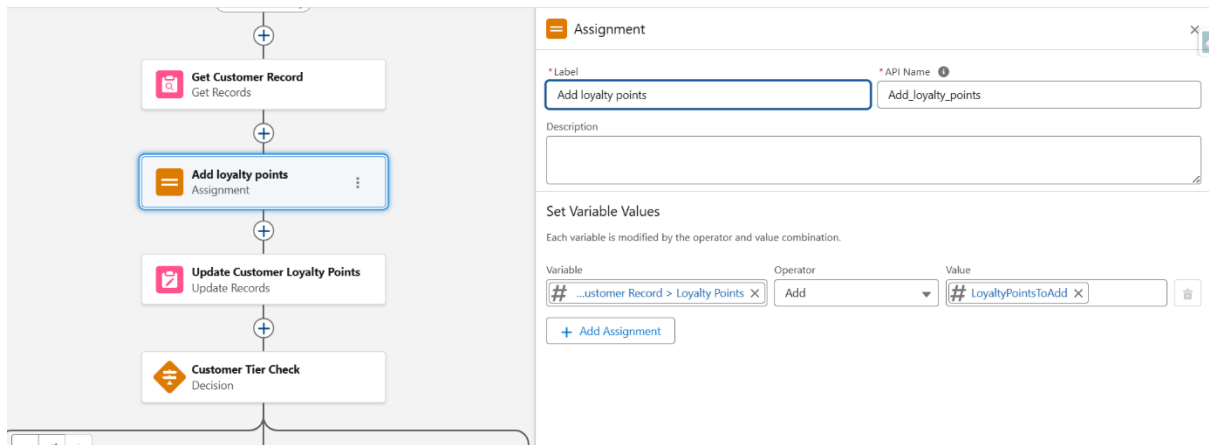
2. Get Customer Record

- Used Get Records element to fetch the Customer associated with the Purchase.
- Ensures the correct customer's Loyalty Points are updated for the purchase.

The screenshot shows the Salesforce Flow Builder interface with the 'Get Records' element selected in the canvas. The right-hand panel is open to the configuration for this element. It shows the 'Label' as 'Get Customer Record' and the 'API Name' as 'Get_Customer_Record'. The 'Get Records of This Object' section shows the 'Object' as 'Customers'. The 'Filter Customers Records' section shows a condition requirement of 'All Conditions Are Met (AND)' with a single condition: 'Record ID' equals '...ring Purchase_c > Customers'.

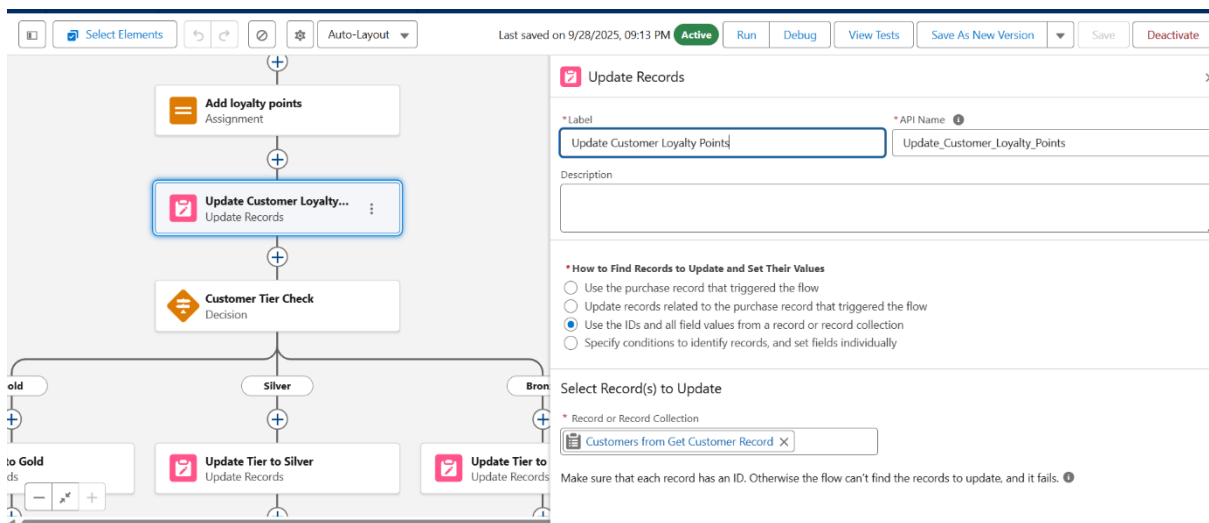
3. Add Loyalty Points (Assignment)

- Created **Assignment** element: $\text{Customer.Loyalty_Points_c} = \text{Customer.Loyalty_Points_c} + \text{LoyaltyPointsToAdd}$
- Purpose: Adds the points earned from the current purchase to the customer's existing Loyalty Points.



4. Update Customer Loyalty Points

- Added Update Records element to save the updated Loyalty Points back to the Customer__c record.
- Purpose: Ensures customer records always display accurate loyalty points after each purchase.



5. Customer Tier Check (Decision)

- Added Decision element to check the customer's total loyalty points:

Outcome Condition

Gold Customers.Loyalty_Points__c >= 500

Silver Customers.Loyalty_Points__c >= 250 && < 500

Outcome Condition

Bronze Customers.Loyalty_Points__c < 250

Flow Builder interface showing a flow for Loyalty Points & Tier Automation - V1. The flow includes steps: Add loyalty points Assignment, Update Customer Loyalty Points Update Records, Customer Tier Check Decision, and Update Tier to Silver Update Records. The right panel shows the configuration for the Customer Tier Check Decision, including outcomes for Gold, Silver, and Bronze tiers, with conditions for Loyalty Points.

Decision Configuration:

- Label:** Customer Tier Check
- API Name:** Customer_Tier_Check
- Outcomes:**
 - Gold:** Outcome API Name: Gold. Condition: All Conditions Are Met (AND). Resource: # ...tomer Record > Loyalty Points. Operator: Greater Than or Equal. Value: 500.
 - Silver:**
 - Bronze:**

6. Update Tier Records

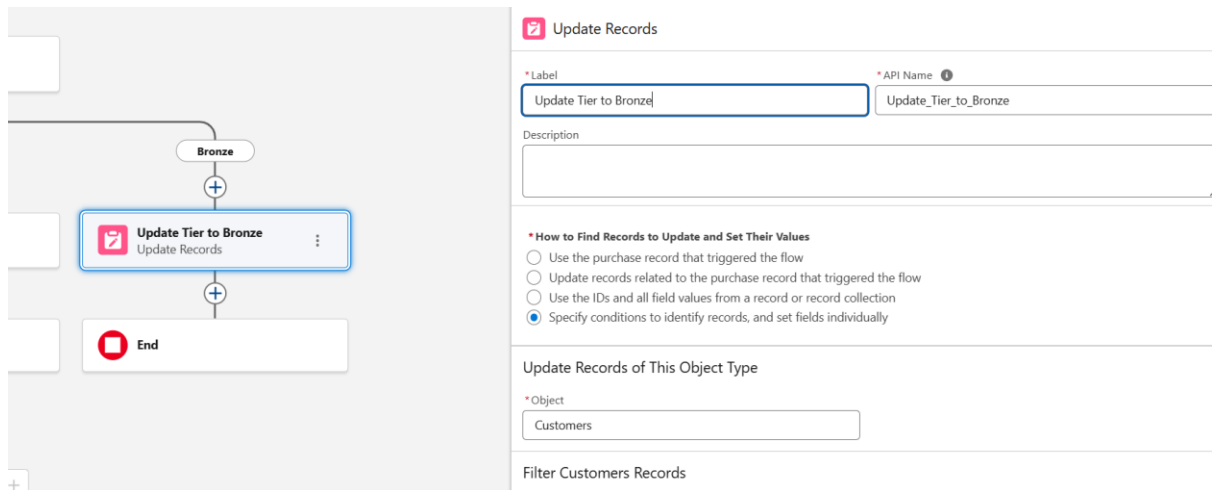
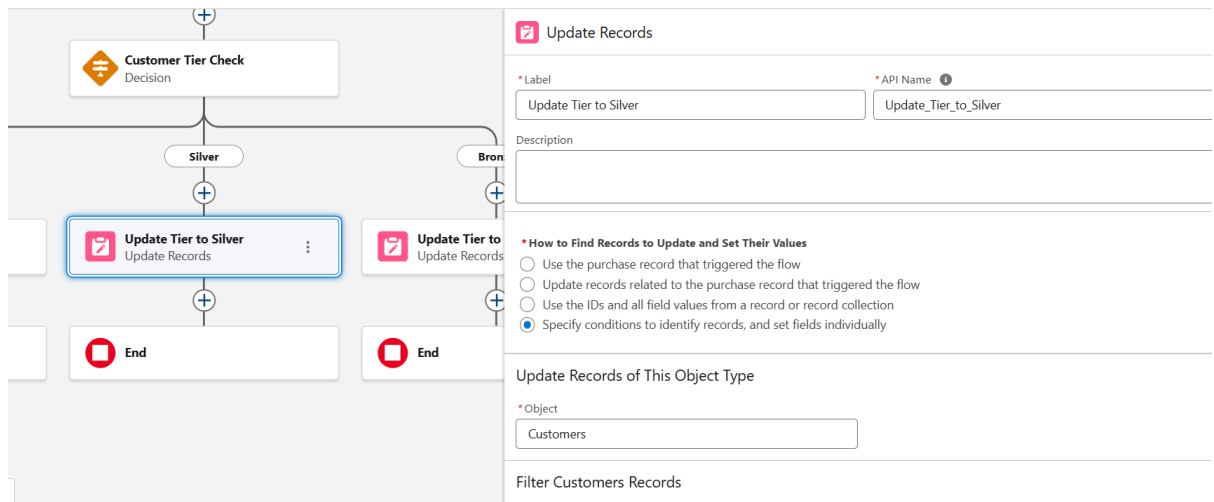
- Added Update Records elements for each tier:
 - Gold:** Update Tier to Gold → End
 - Silver:** Update Tier to Silver → End
 - Bronze:** Update Tier to Bronze → End

Purpose: Updates the Tier__c field automatically based on the customer’s loyalty points.

Flow Builder interface showing the configuration for the Update Records step. The flow includes steps: Update Tier to Gold Update Records, Update Tier to Silver Update Records, and End. The right panel shows the configuration for the Update Records step, including the label, API Name, and the 'How to Find Records to Update and Set Their Values' section.

Update Records Configuration:

- Label:** Update Tier to Gold
- API Name:** Update_Tier_to_Gold
- Description:**
- How to Find Records to Update and Set Their Values:**
 - ☐ Use the purchase record that triggered the flow
 - ☐ Update records related to the purchase record that triggered the flow
 - ☐ Use the IDs and all field values from a record or record collection
 - ☒ Specify conditions to identify records, and set fields individually
- Update Records of This Object Type:**
 - Object:** Customers
- Filter Customers Records:**
 - Condition Requirements to Update Records:**



7. Test the Flow

- Created test Purchase records for customers in different tiers.
- Verified that Loyalty Points and Tier are updated correctly.
- Ensured multiple purchases accumulate points correctly over time.

Outcome

- Loyalty Points are updated automatically and accurately based on customer tier.
- Eliminates manual errors and ensures real-time updates.
- Flow is bulk-safe, supporting multiple records at once.

