Phase 5 : Automation

Sending Emails to Gold Tier Customers Using Flow

Objective:
Automatically notify Gold Tier customers via email whenever they make a purchase. This ensures timely communication, increases customer engagement, and strengthens loyalty.
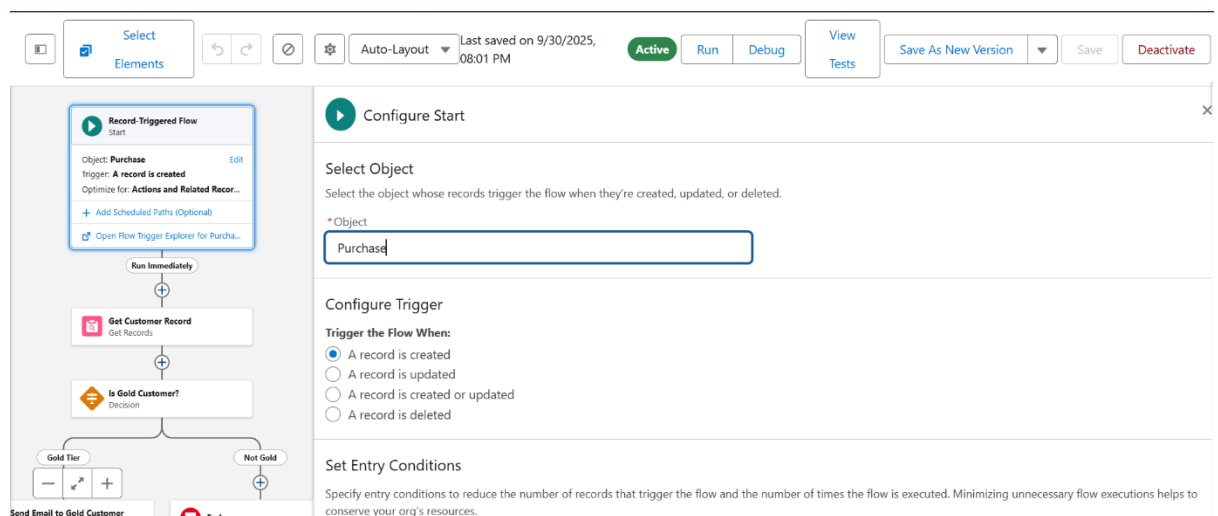
Implementation Details

A Record-Triggered Flow called GoldCustomerEmailFlow was implemented on the Purchase object. The Flow triggers when a new Purchase record is created, retrieves the associated Customer, checks their Tier__c, and sends an email using the Gold Tier Email Template if the customer is Gold Tier.

Flow Components
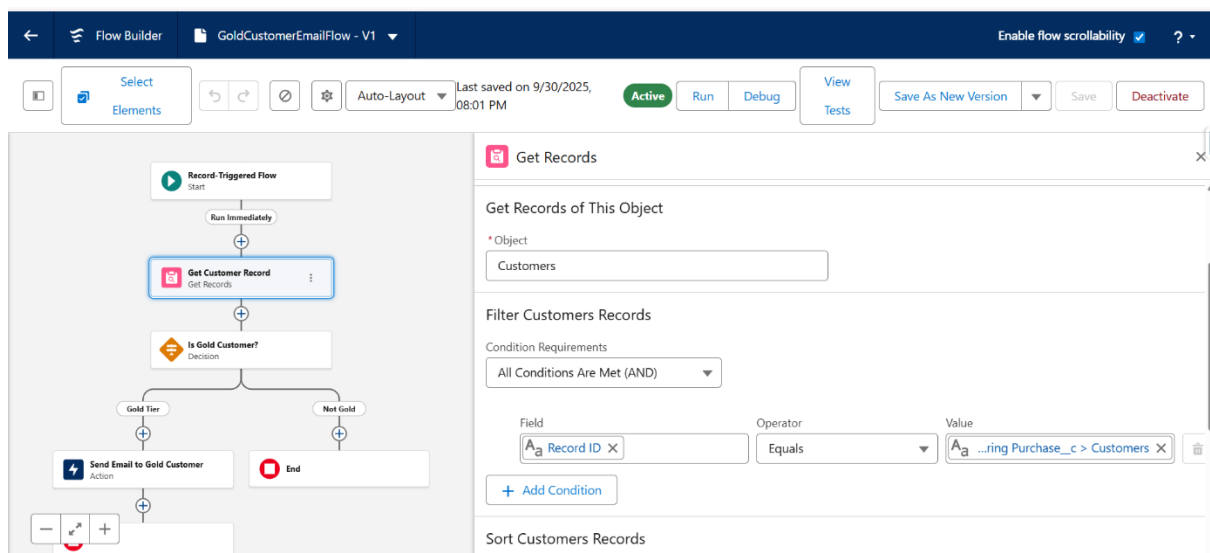
1. Start Element

   Description:

   • Triggers the Flow when a Purchase record is created.

   • Optimized for Actions and Related Records, allowing the Flow to perform actions such as sending emails.

   • Run Immediately after record creation.

   • Object: Purchase

   • Trigger Condition: Record is created.

   • No additional entry conditions; filtering is done in later elements.

2. Get Records – Get Customer Record

Description:

- Retrieves the related Customer from the Customers object using the Customer lookup field in Purchase.

- Allows the Flow to access Tier__c and Email fields for decision-making and sending email.

- Filter Conditions:

  - Customer ID equals Purchase.Customer__c (lookup field)

- Records to Store: Only the first record (Customer ID is unique)

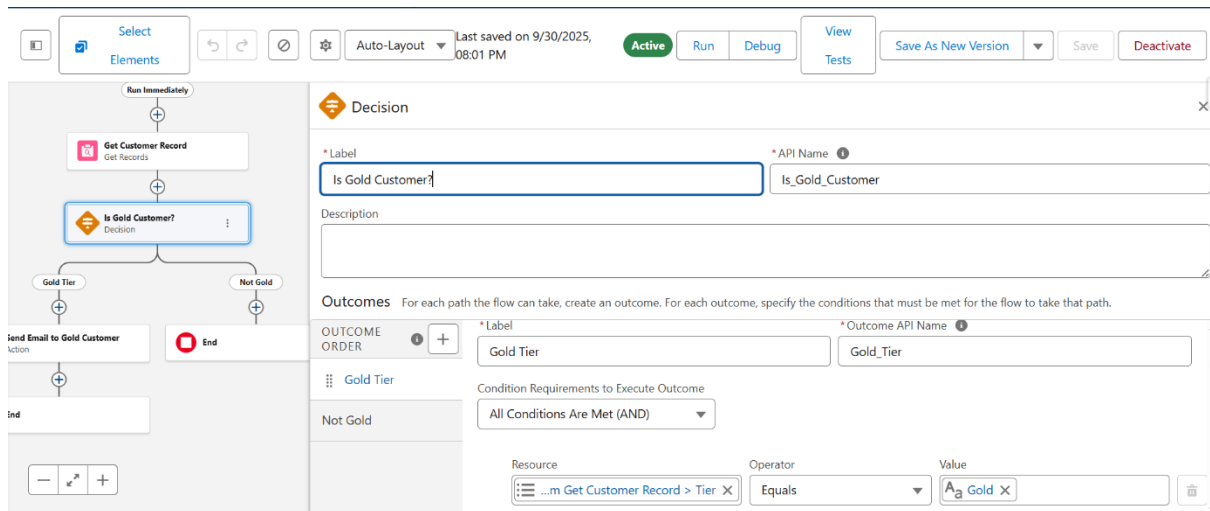- Fields to Store: Automatically store all fields to allow email personalization.

3. Decision – Is Gold Customer?

Description:

- Evaluates whether the Customer is a Gold Tier member.

- API Name: Is_Gold_Customer

- Outcomes and Conditions:

  1. Gold Tier (Gold_Tier):

     - Condition: Get_Customer_Record.Tier__c Equals Gold

     - Action: Proceed to send email

  2. Not Gold:

- ▪ Condition: Default outcome

- ▪ Action: End Flow

4. Action – Send Email to Gold Customer

Description:

- • Sends a personalized email to the customer using the Gold Tier Email Template.

- • API Name: Send_Email_to_Gold_Customer

- • Recipient: Customer Email from Get_Customer_Record

Template Content:

 Subject: Thank You for Your Purchase!

Body (Rich Text):
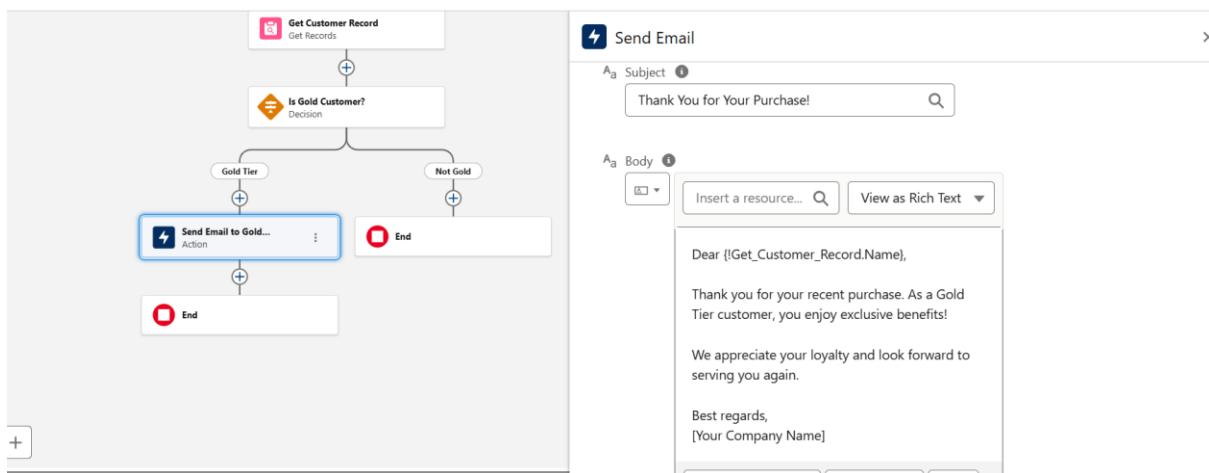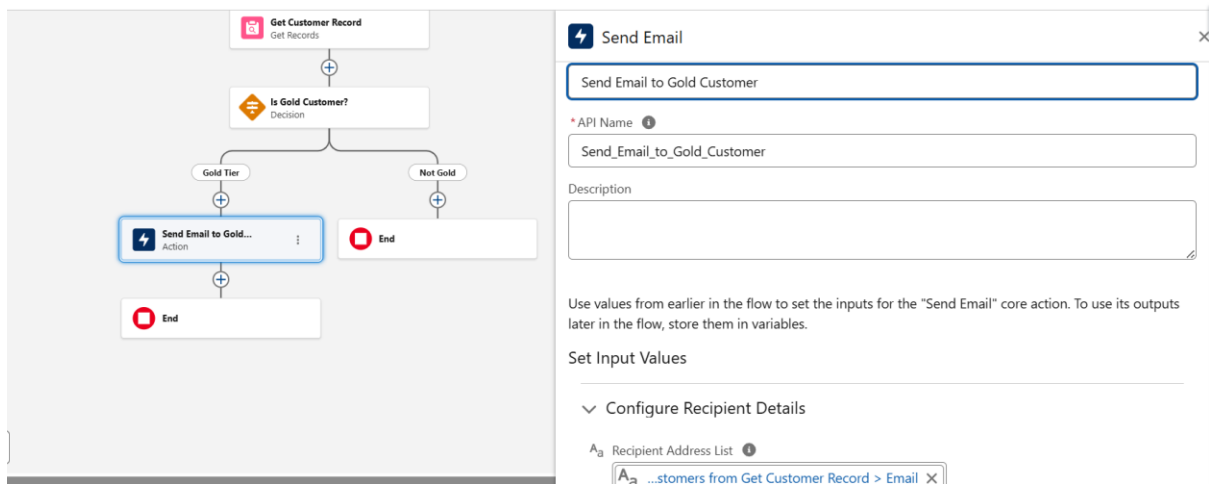
Dear {!Get_Customer_Record.Name},

Thank you for your recent purchase. As a Gold Tier customer, you enjoy exclusive benefits!

We appreciate your loyalty and look forward to serving you again.

Best regards,

[Your Company Name]

Execution Condition: Only triggered for **Gold Tier outcome** from Decision element.

5. End Element

Description:

- Marks the completion of the Flow.

- Not Gold outcome: Flow ends without sending an email.

Outcome & Benefits

- Gold Tier customers receive automated email notifications after purchases.

- Non-Gold customers do not receive emails.

- Declarative solution eliminates the need for Apex, making it maintainable by admins.

- Allows easy tracking and auditing through Flow logs.

- Improves real-time customer engagement and loyalty.

Record-Triggered Flow
Start

Run Immediately

Get Customer Record
Get Records

Is Gold Customer?
Decision

Gold Tier

Not Gold

Send Email to Gold Customer
Action

End

End