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

**Flow Builder – Record-Triggered Flow: Invoice Auto-Create on Opportunity**

* **Goal:** Automatically create an Invoice\_\_c record when an Opportunity’s Stage becomes **Closed Won**.
* **Flow Setup:**
  + Setup → Flows → New Flow → **Record-Triggered Flow → Create**
  + **Object:** Opportunity
  + **Trigger:** A record is updated
* **Entry Conditions:**
  + StageName equals **Closed Won**
  + (Optional) IsClosed = True
* **When to Run the Flow:** After the record is saved (so child records can be created)
* **Flow Actions:**
  + **Action Type:** Create Records
  + **Label:** Create Invoice
  + **How Many Records to Create:** One
  + **Object:** Invoice\_\_c
  + **Set Field Values:**
    - Account\_\_c = {!$Record.AccountId}
    - Opportunity\_\_c = {!$Record.Id}
    - Amount\_\_c = {!$Record.Amount}
    - Due\_Date\_\_c = {!$Flow.CurrentDate} + 7 (use formula or set Date value)
    - Status\_\_c = Pending
* **Save & Activate:**
  + Flow Name: **Invoice\_AutoCreate\_Opportunity**
  + **Activate** the Flow