Salesforce Flow: Set Region Based on State

Objective

Flow Name: Set Region Based on State

Flow Type: Record-Triggered Flow

Use Case: When Account's Billing State is CA, WA, or OR, automatically set Region field to 'West Coast'.

Step 1: Create the Flow

1. Go to Setup > Flows > Click 'New Flow'.

2. Choose 'Record-Triggered Flow' and click 'Create'.

Step 2: Configure Start

1. Object: Account

2. Trigger the Flow When: A record is created or updated

3. Condition Requirements:

- Field: BillingState

- Operator: Is Changed OR Is Null = False

4. Run Flow: After the record is saved

Click 'Done'.

Step 3: Add Decision Element

1. Click '+' and select 'Decision'.

2. Label: Check If State Is West Coast

3. Outcome Label: Is West Coast

   - Resource: {!$Record.BillingState}

   - Operator: Equals

   - Value: 'CA', 'WA', 'OR' (use OR logic or IN operator depending on UI support)

Step 4: Add Update Records Element

1. From the West Coast path, add an 'Update Records' element.

Salesforce Flow: Set Region Based on State

2. Label: Update Region Field

3. Record to Update: Use the $Record from the flow

4. Field Values:

- Field: Region

- Value: West Coast

Click 'Done'.

Step 5: Save and Activate

1. Click Save and name the flow (e.g., SetRegionBasedOnState).

2. Click Activate.

Flow Summary

Element: Start - Trigger on Account when BillingState changes

Element: Decision - Check if state is CA, WA, or OR

Element: Update Records - Set Region to 'West Coast'