

Salesforce Flow: Auto-Update Incomplete Records

Objective

Flow Name: Update Blank Industry Field

Flow Type: Scheduled Flow

Use Case: Every day, update Accounts with blank Industry and set it to 'Other'.

Step 1: Create the Flow

1. Go to Setup > Flows > Click New Flow.
2. Choose 'Scheduled-Triggered Flow' and click Create.

Step 2: Set Schedule

1. In the Start element:
 - Frequency: Daily
 - Start Date/Time: Choose when you want it to start
 2. Object: Select Account
 3. Condition Requirements:
 - Field: Industry
 - Operator: Is Null
 - Value: True
 4. Optimize the Flow For: Actions and Related Records
- Click Done.

Step 3: Add an Update Records Element

1. Click + and select 'Update Records'
2. Label: Update Industry to Other
3. How to Find Records to Update:
 - Use the records from the Start element
4. Set Field Values for the Account Records:
 - Field: Industry
 - Value: 'Other'

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Click Done.

Step 4: Save and Activate

1. Click Save.
 - Flow Name: Update_Blank_Industry
2. Click Activate.

Flow Summary

Element: Start (Scheduled) - Daily, Object: Account, Industry = Null

Element: Update Records - Set Industry = 'Other'

How It Works

Each day, Salesforce will:

- Search all Account records where Industry is blank.
- Automatically update the Industry field to 'Other'.