

## Phase 4: Process Automation (Admin)

In this phase, a powerful automation was built using Salesforce Flow to streamline the shelter's core workflow, directly addressing the inefficiencies identified in the initial analysis. A single, efficient process was created to handle all the necessary tasks that occur when an adoption is approved, eliminating the need for manual intervention and ensuring data consistency.

### **Step-by-Step Process:**

1. **Designing the Flow Trigger:** A record-triggered flow was designed to launch automatically at the precise moment an Adoption Request record is updated. The specific entry condition was set to trigger only when the Status field on the request is changed to "Approved," ensuring the automation runs only at the correct time in the business process.
2. **Automating the Pet Status Update:** The first action configured in the flow was to update the status of the associated pet. The flow was built to find the related Pet record linked to the adoption request and automatically change the value of its Status field from "Available" to "Adopted". This ensures that the pet is immediately removed from the list of available animals.
3. **Automating Adopter Communication:** The second action was to automate communication with the new owner. An action was added to the flow to send a pre-defined confirmation email directly to the adopter's email address upon approval. This provides immediate, positive feedback to the adopter and confirms their successful application without any manual work from shelter staff.

Group 1 | Flows | Salesforce | Adoption Request Approved - V2 | Adoption Request Approved - V9 | Google Gemini | Home | Salesforce

https://orgfarm-d5e61804f8-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowbuilder.app?flowId=301gL00000QvFJWQA3

Flow Builder | Adoption Request Approved - V9

Last saved on 10/7/2025, 04:54 AM | Active | Run | Debug | View Tests | Save As New Version | Save | Deactivate

Select Elements | Auto-Layout

**Record-Triggered Flow**  
Start  
Object: **Adoption Request** | Edit  
Trigger: **A record is updated**  
Conditions: 1  
Optimize for: **Actions and Related Records**  
+ Add Scheduled Paths (Optional)  
Open Flow Trigger Explorer for Adoption Request

Run Immediately

+ Update Pet Status  
Update Records

+ Set Adopter Email  
Assignment

+ Send Confirmation Email  
Action

**Send Email**

NO USE LINE BREAKS

Enter value or search resources...

Attachment ID  
Search records...

Attachment ID Collection  
Enter value or search resources...

Recipient ID  
Send Confirmation Email X

Related Record ID  
Search objects...

Log Email on Send  
Enter value or search resources...

Show advanced options

22°C Mostly clear | Search | ENG IN | 04:55 07-10-2025