Phase 5: Salesforce Flow Automation

Goal:

Implement automation in Salesforce using Flows to handle business processes that cannot be achieved with simple declarative tools like formulas or validation rules. These flows streamline operations such as record updates, notifications, and approvals.

1. Flows Implemented

- Record-Triggered Flows:

Triggered when new records are inserted or updated. Used to automate record validation and ensure data consistency. Example: Auto-check appointment details and prevent invalid entries.

- Screen Flows:

Designed interactive flows for guided user input. Example: Appointment booking wizard for end-users with step-by-step guidance.
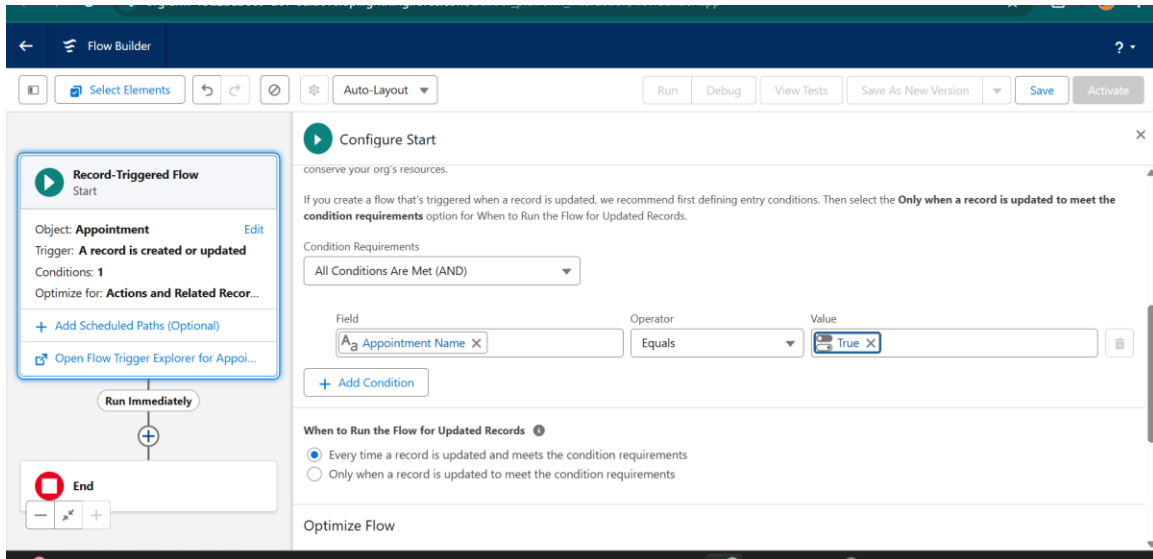
- Scheduled Flows:

Runs automatically at defined times. Example: Daily check of upcoming appointments and sending reminder notifications.

2. Flow Design Pattern

Business logic centralized within Record-Triggered Flows to maintain reusability. Decision elements were used to apply conditional logic (e.g., check overlapping appointment times). Update and Create elements were applied to insert or modify records automatically.
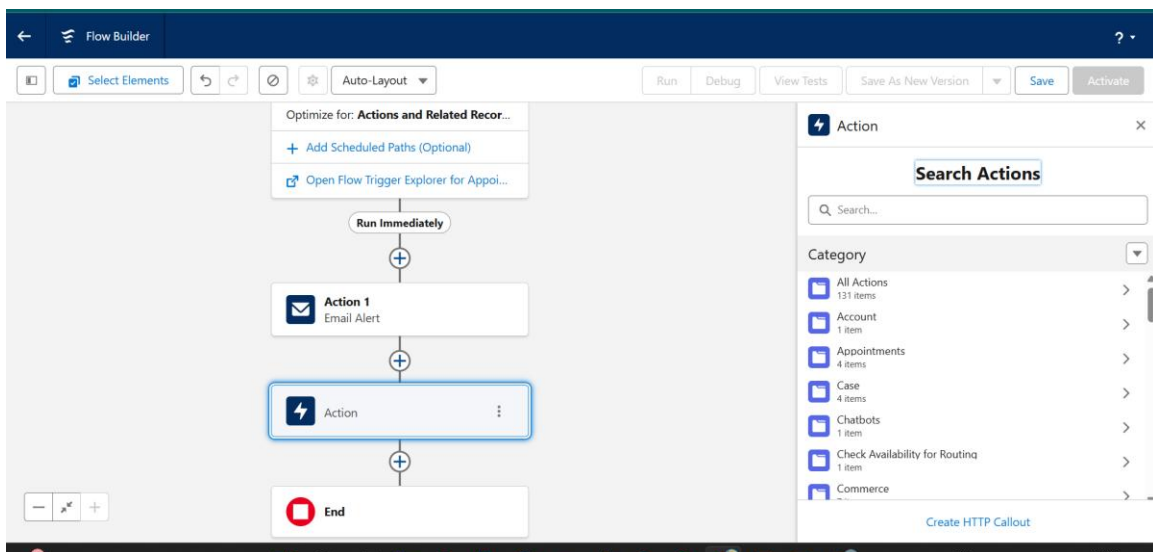
3. Testing & Results

- Flows successfully prevented invalid or overlapping records.
- Screen Flows guided users through appointment booking with fewer errors.
- Scheduled Flows executed on time and sent notifications as expected.

4. Skipped / Not Implemented

Advanced Apex automation such as Triggers, Batch Apex, and Queueable classes were not part of this phase. The focus remained on Flow-based declarative automation.

5. Conclusion

Phase 5 successfully delivered automation using Salesforce Flows. Record validations, guided processes, and scheduled reminders were implemented effectively. The system now operates with higher efficiency, reduced manual effort, and better data accuracy.