

Lab Exercise 10 — Data Cloud in Flows (Access & Trigger Automations)

Objective

By the end of this hands-on, learners will:

- Access Data Cloud DMO fields in Flow Builder.
- Create an automation triggered by a Data Cloud data change.
- Simulate lifecycle or loyalty-triggered actions (e.g., send an alert or email).

Step-by-Step Salesforce UI Procedure

Step 1 – Open Flow Builder

1. In **Setup**, search for **Flows**.
2. Click **New Flow** → choose **Record-Triggered Flow**.

Step 2 – Configure Flow Trigger

1. Choose the **Object**: Individual (Data Model Object) or Customer.
2. Configure trigger:
 - **Trigger When**: A record is created or updated
 - **Condition**: LoyaltyPoints >= 500 (or similar numeric field)
 - **Trigger Flow**: After the record is saved
3. Click **Done**.

Step 3 – Add a Decision Element (Optional)

1. Drag the **Decision** element onto the canvas.
2. Label: Check Tier Level.

3. Define condition:
 - **Resource:** \$Record.LoyaltyStatus
 - **Operator:** Equals
 - **Value:** Gold

4. Click **Done**.

Step 4 – Add an Action

1. From the toolbox, drag **Action** → **Core Action** → **Send Email** (or **Post to Chatter**, if Email is not available in DE).
2. Label: Send Congratulations Message.
3. Define message:
 - **To Address:** \$Record.Email
 - **Subject:** Congratulations on Your Gold Tier!
 - **Body:** You've achieved Gold Loyalty Tier. Enjoy your rewards.
4. Click **Done**.

Step 5 – Connect Elements

1. Connect the **Start** → **Decision** → **Action** → **End** flow path.
2. Click **Save** → Name it: Loyalty Upgrade Notification Flow.
3. Click **Activate**.

Step 6 – Test the Flow

1. Open **Data Explorer** → **Individual**.
2. Update a test profile's LoyaltyPoints value to **≥ 500**.
3. Save the record → trigger executes.
4. Check **Flow Runs** for success status (Setup → Flow → View All Flows → Debug Log).

Result: You've built and activated a Flow triggered by Data Cloud data changes.