

## Smart Waste Management Tracker – Salesforce Project

### Phase 4: Automation – Record-Triggered Flow

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#### Step 1: Goal of Phase 4

- Automate WasteBin status update when a CollectionRecord is created or updated.
- Reduce manual work and ensure accurate bin status tracking.

**Expected Outcome:** Collection of records automatically updates the corresponding WasteBin status.

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#### Step 2: Create Record-Triggered Flow

- Setup → Process Automation → Flows → New Flow → Record-Triggered Flow.
- Select **Object:** CollectionRecord\_\_c
- Trigger the flow: **A record is created or updated**
- Entry Conditions: **None** (or as per requirement)
- Optimize Flow for **Fast Field Updates**

The screenshot displays the Salesforce Flow Builder interface. On the left, a canvas shows a flow diagram starting with a 'Record-Triggered Flow' start element, followed by a 'Run Immediately' connector, a 'Get WasteBin' action, a 'Check Capacity' decision, and two exit paths labeled 'Bin Full' and 'Default Outcome'. On the right, the 'Configure Start' panel is open, showing the configuration for the 'Record-Triggered Flow'.

**Configure Start**

Select Object  
Select the object whose records trigger the flow when they're created, updated, or deleted.

\* Object  
Collection Record

Configure Trigger  
Trigger the Flow When:  
☐ A record is created  
☐ A record is updated  
☒ A record is created or updated  
☐ A record is deleted

Set Entry Conditions  
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

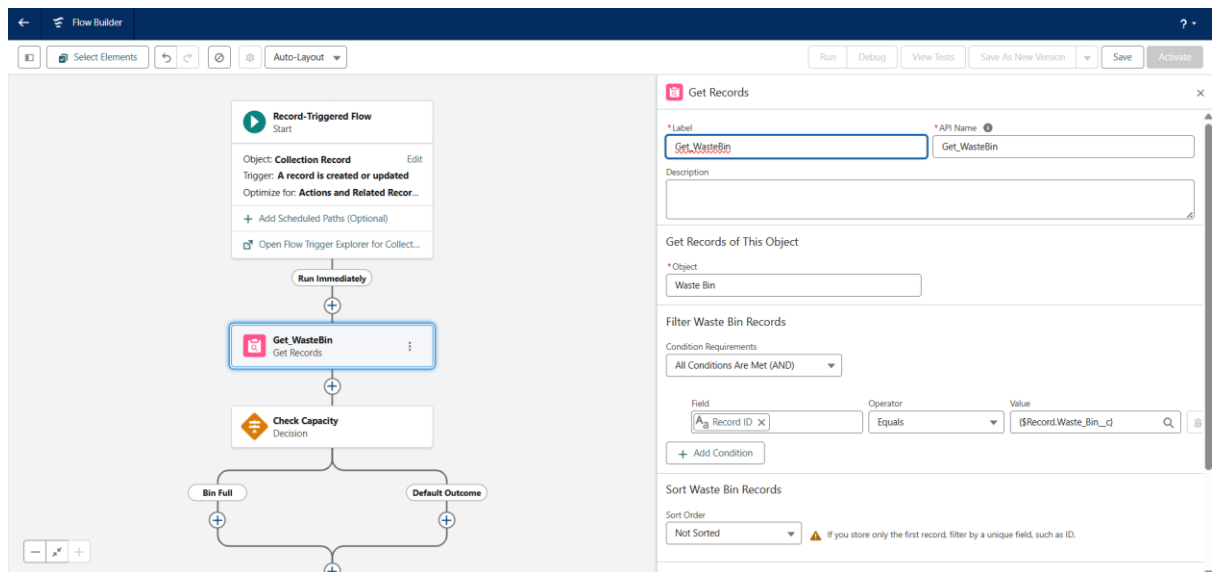
Condition Requirements  
None

Optimize Flow  
Optimize the Flow for:

#### Step 3: Get WasteBin Record

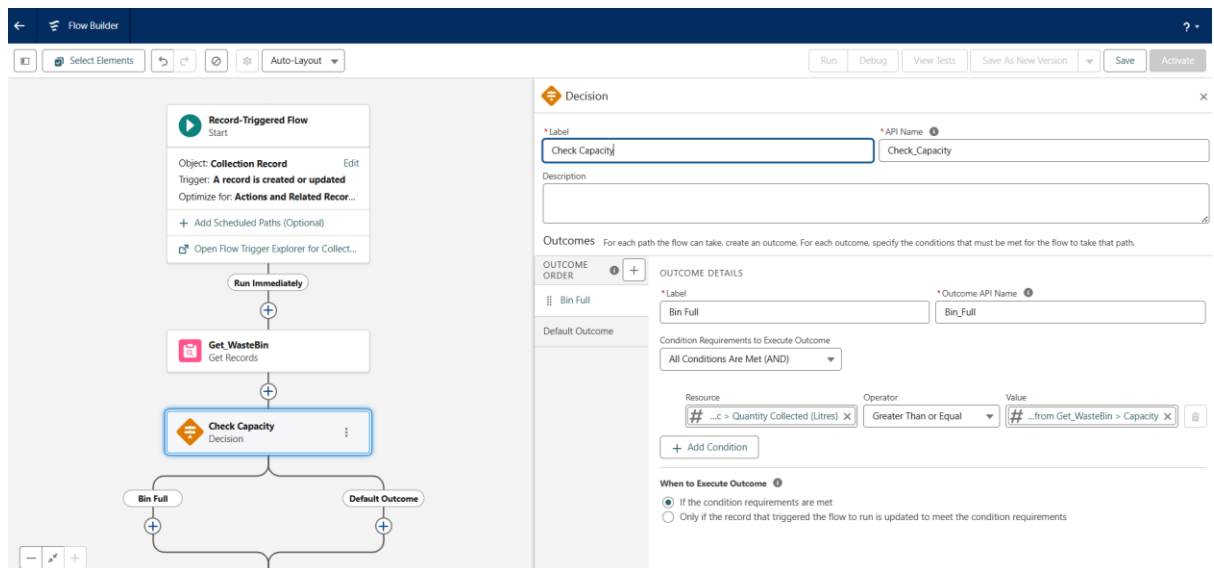
- Add **Get Records** element → Label: Get\_WasteBin
- Object: WasteBin\_\_c
- Condition: Id = {!\$Record.WasteBin\_\_c} (lookup from triggering CollectionRecord)

- Store all fields → Only the first record



#### Step 4: Check Bin Capacity (Decision Element)

- Add **Decision** → Label: Check Capacity
- Outcome 1: Bin Full → Condition:  $\{ \$Record.Quantity\_Collected\_c \} \geq Capacity\_c$
- Outcome 2: Default Outcome → Any other case



#### Step 5: Update WasteBin Status

- Add **Update Records** → Label: Update\_WasteBin\_Status
- Record to update: Waste Bin from Get\_WasteBin

- Set Field Values:
  - Field: Status\_\_c
  - Value: Full (or based on logic)

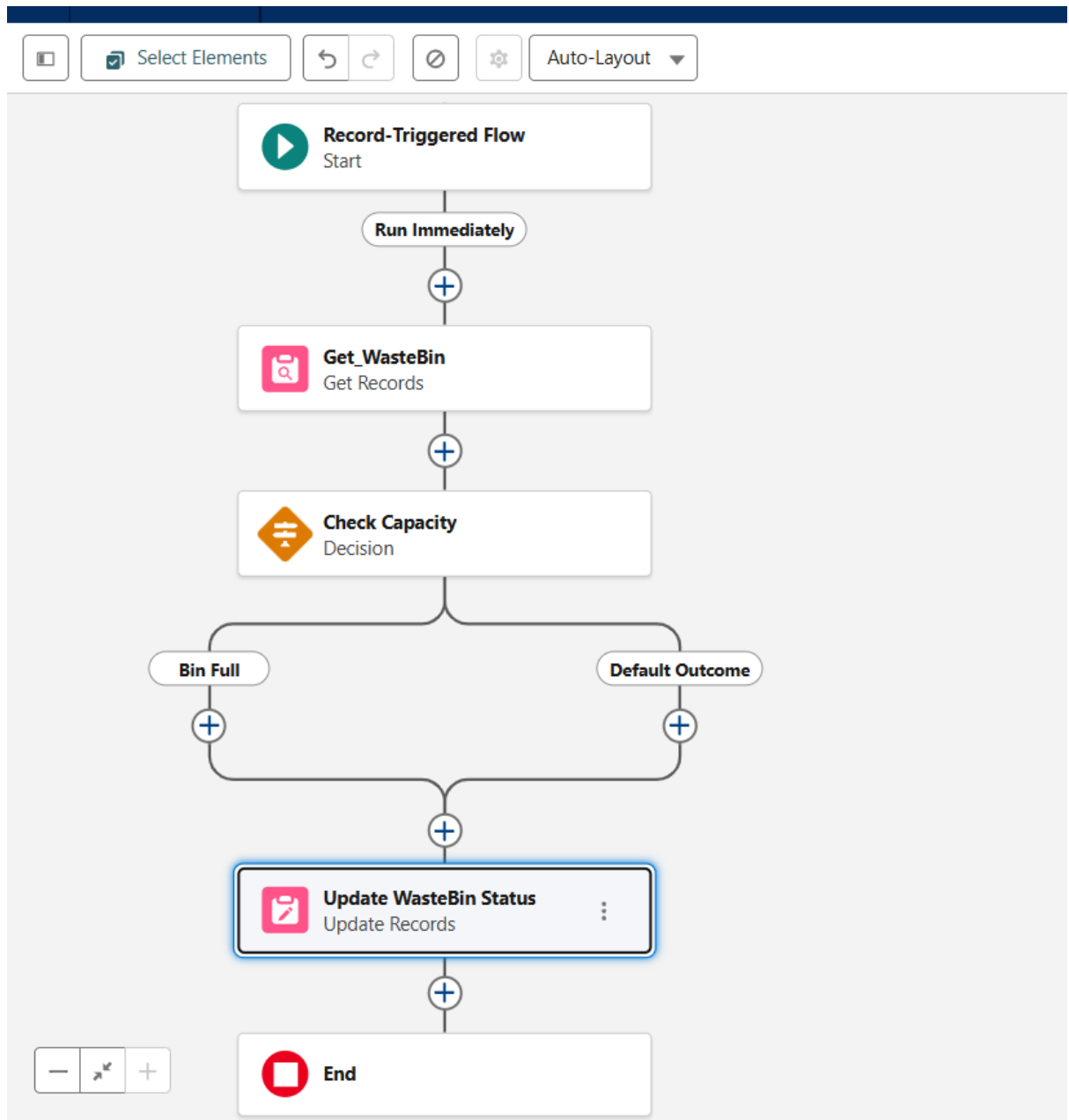
The screenshot displays the Salesforce Flow Builder interface. On the left, a flow diagram is visible, starting with a 'Record Triggered Flow Start' element, followed by 'Get\_WasteBin' (Get Records), 'Check Capacity' (Decision), and 'Update\_WasteBin\_Status' (Update Records), ending with an 'End' element. The 'Check Capacity' decision has two paths: 'Bin Full' and 'Default Outcome'. The 'Update\_WasteBin\_Status' element is highlighted. On the right, the 'Update Records' configuration panel is open, showing settings for updating 'Waste Bin' records. The 'Filter Waste Bin Records' section shows a condition: 'Record ID' equals '...om Get\_WasteBin > Record ID'. The 'Set Field Values for the Waste Bin Records' section shows the 'Status' field being set to 'Full'.

## Step 6: Connect Flow Elements

- Start → Get\_WasteBin → Check Capacity → Update\_WasteBin\_Status → End
- Connect both decision outcomes if needed

## Step 7: Save & Activate Flow

- Flow Label: Update Waste Bin Status
- API Name: Update\_Waste\_Bin\_Status
- Description: "Automatically updates WasteBin\_\_c status to Full when CollectionRecord\_\_c is created/updated"
- Save → Activate



#### Expected Outcome (Phase 4 Completion)

- WasteBin status automatically updates based on CollectionRecord quantity.
- Reduces manual errors and improves operational efficiency.
- Flow ready for testing in Sandbox/Dev Org.