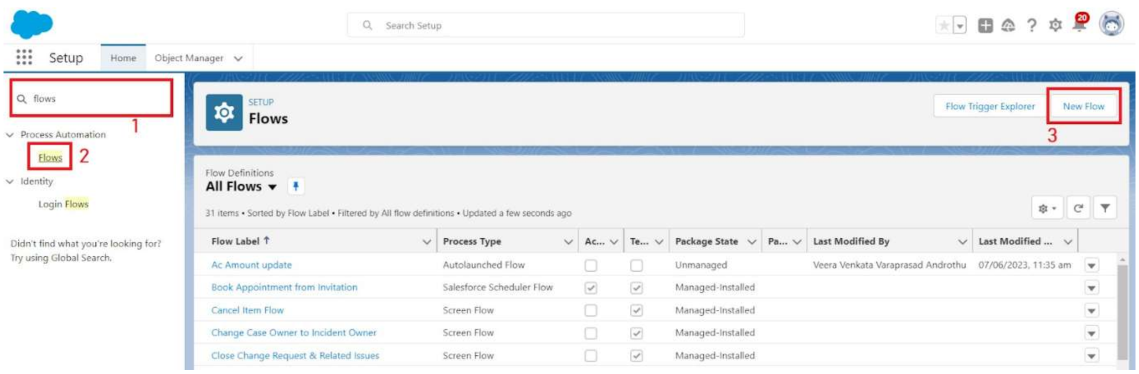
Flows

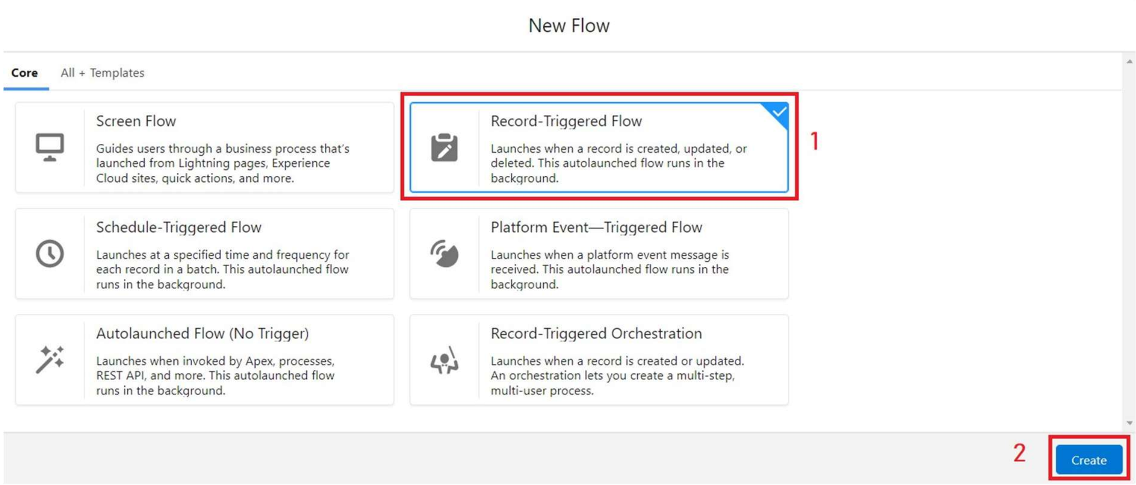
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Create a Flow

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.



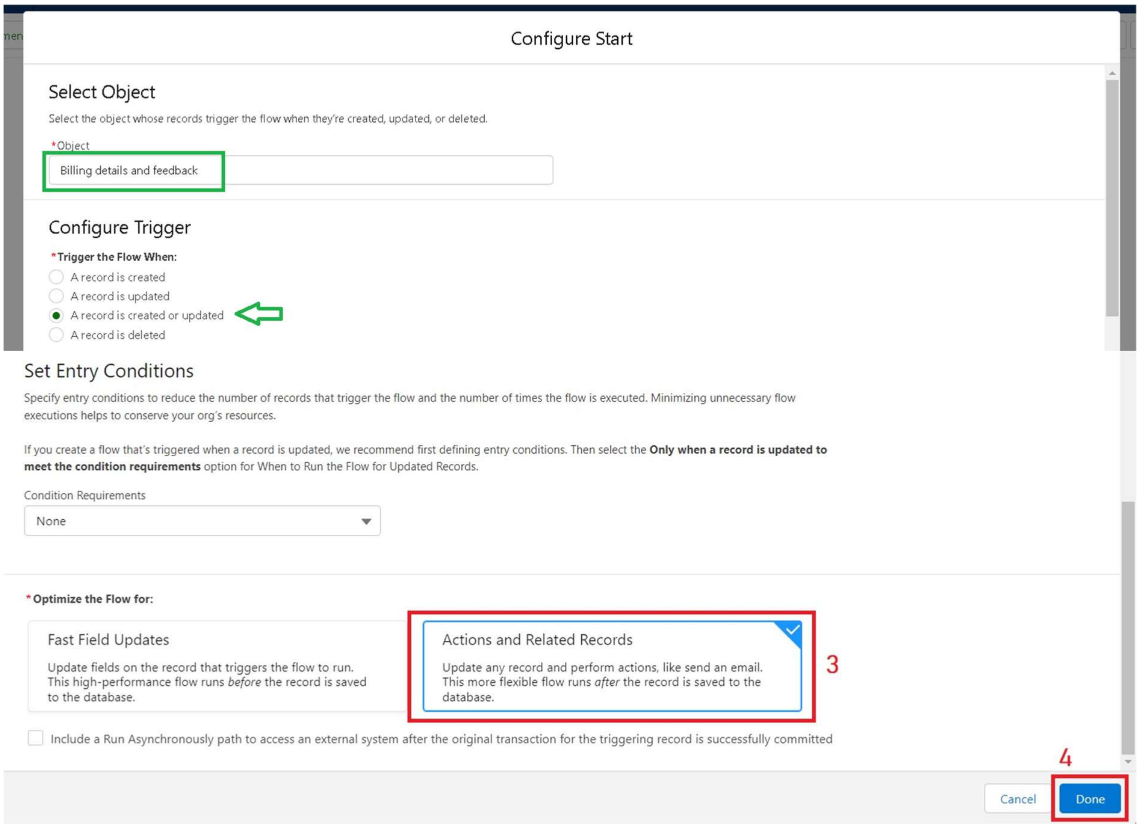
2. Select the Record-triggered flow and Click on Create.



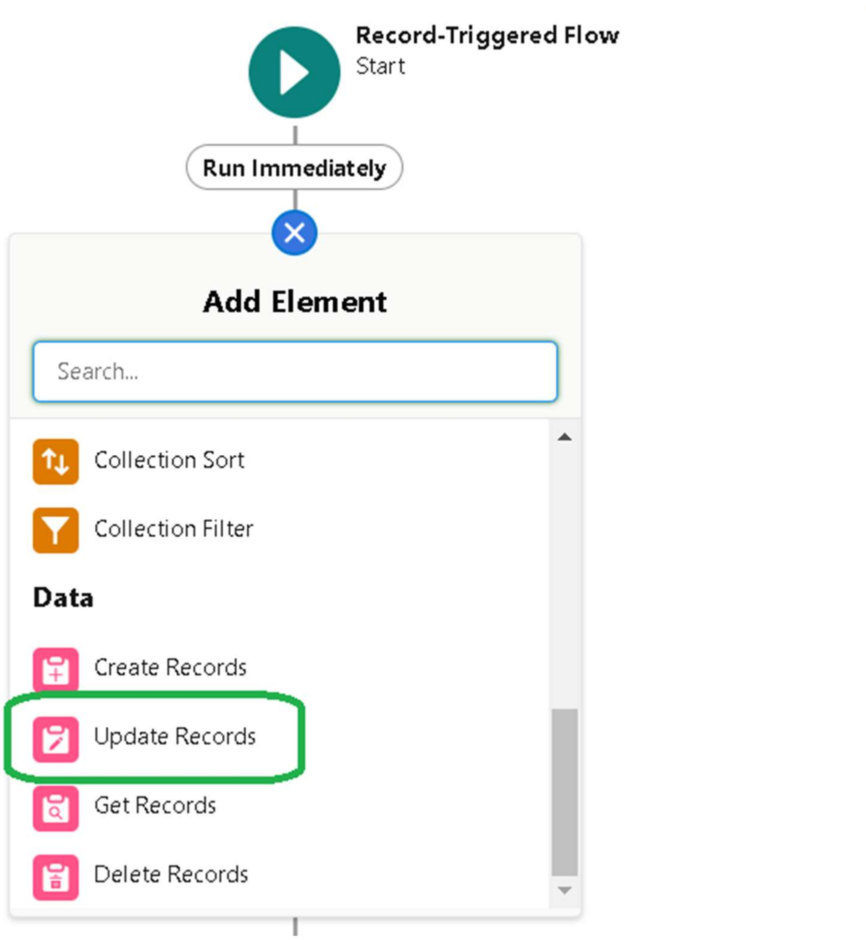
3. Select the Object as “Billing details and feedback”in the Drop down list.

4. Select the Trigger Flow when: “A record is Created or Updated”.

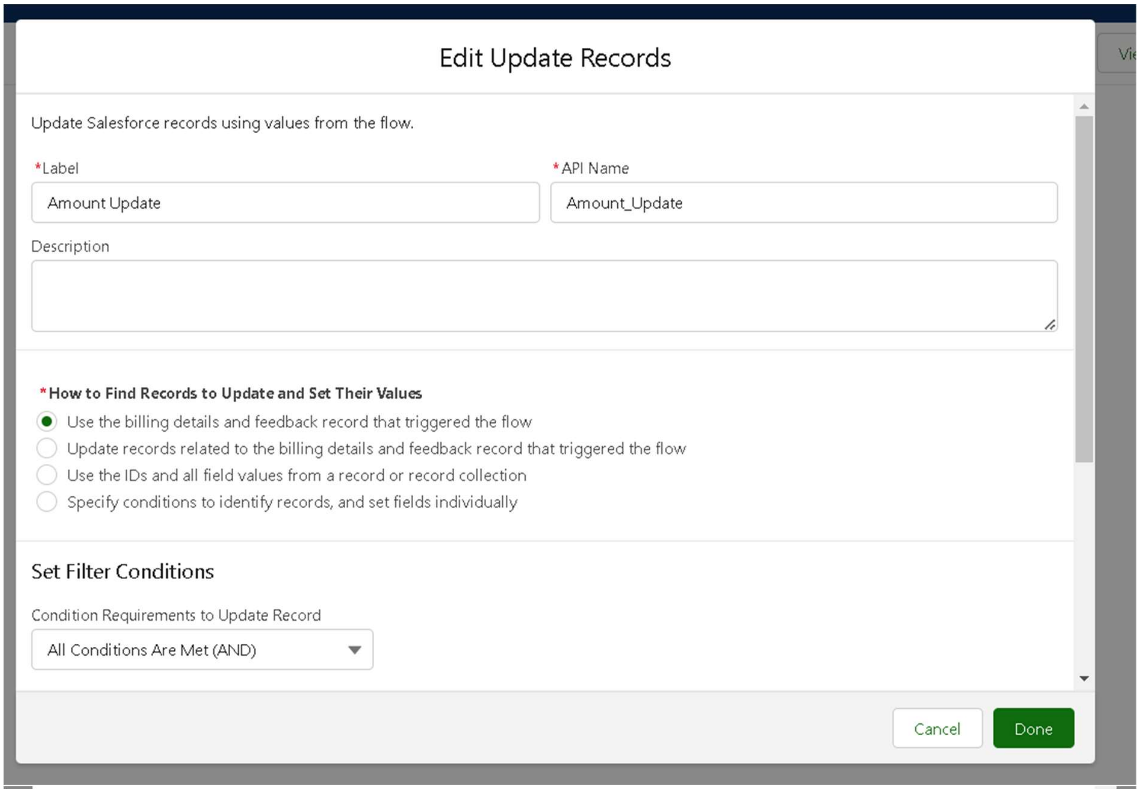
5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.

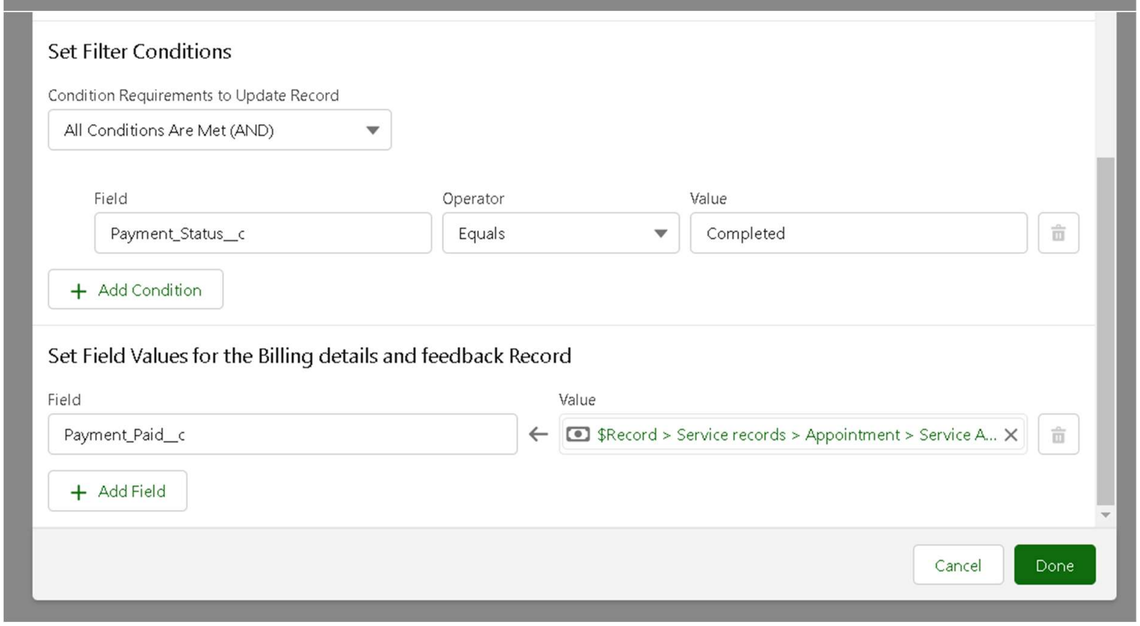


6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”.



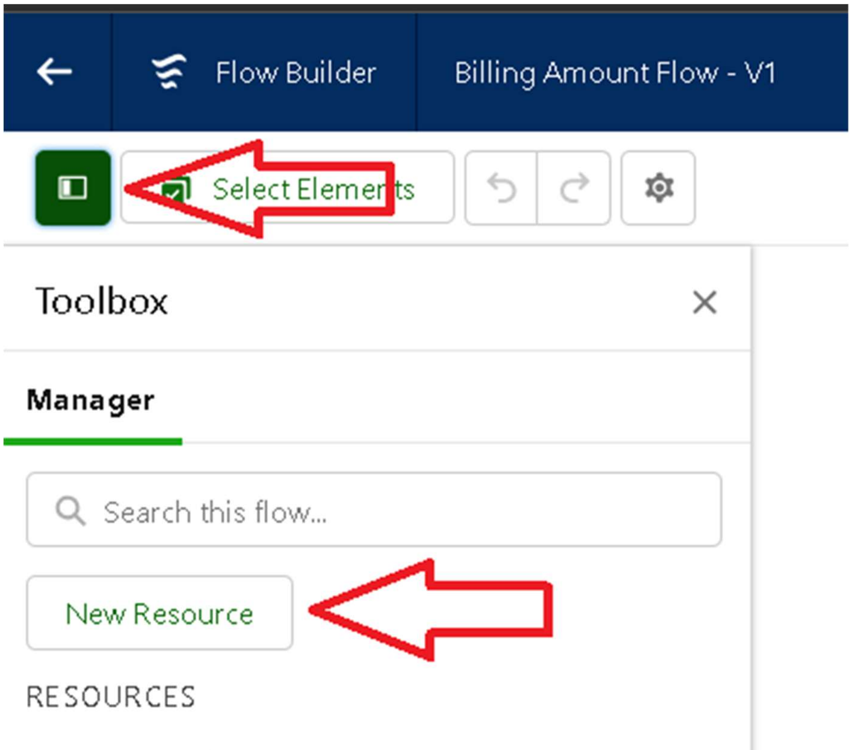
7. Give the Label Name : Amount Update
8. Api name : is auto populated





9. Set a filter condition : All Conditions are met(AND)
10. Field : Payment_Status__c
11. Operator : Equals
12. Value : Completed
13. And Set Field Values for the Billing details and feedback Record
14. Field : Payment_Paid__c

15. Value : {!$Record.Service_records__r.Appointment__r.Service_Amount__c}
16. Click On Done.
17. Before creating another Element. Create a New Resource form Toolbox form top left.



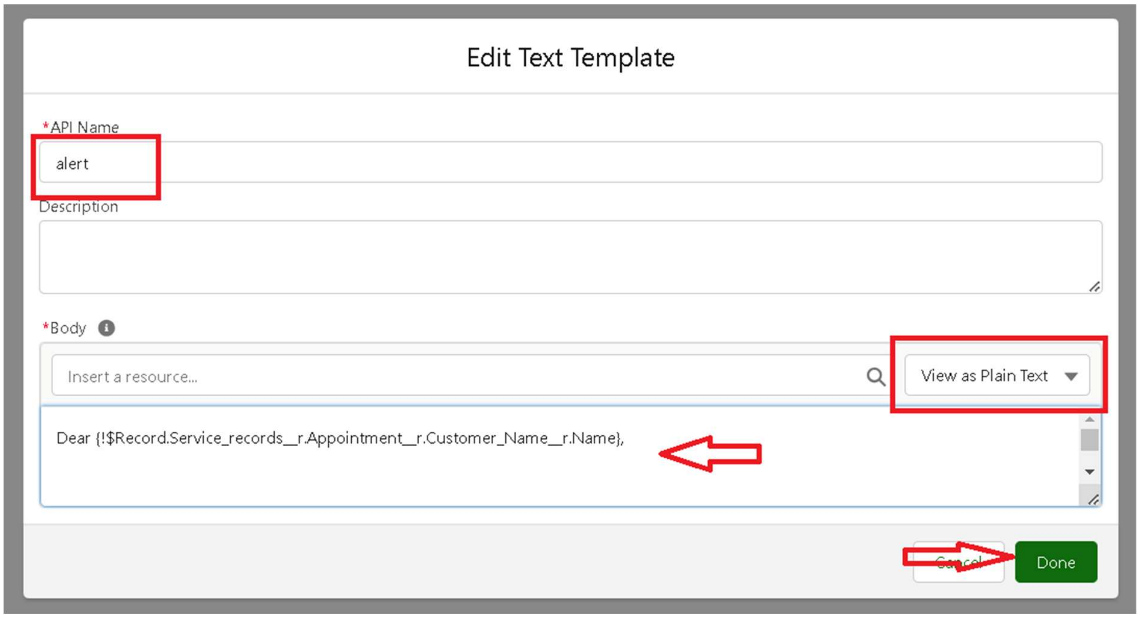
18. Click on the New Resource, And select Variable.
19. Select the resource type as text template.
20. Enter the API name as " alert".
21. Change the view as Rich Text ? View to Plain Text.
22. In body field paste the syntax that given below.

Dear {!$Record.Service_records__r.Appointment__r.Customer_Name__r.Name}
,

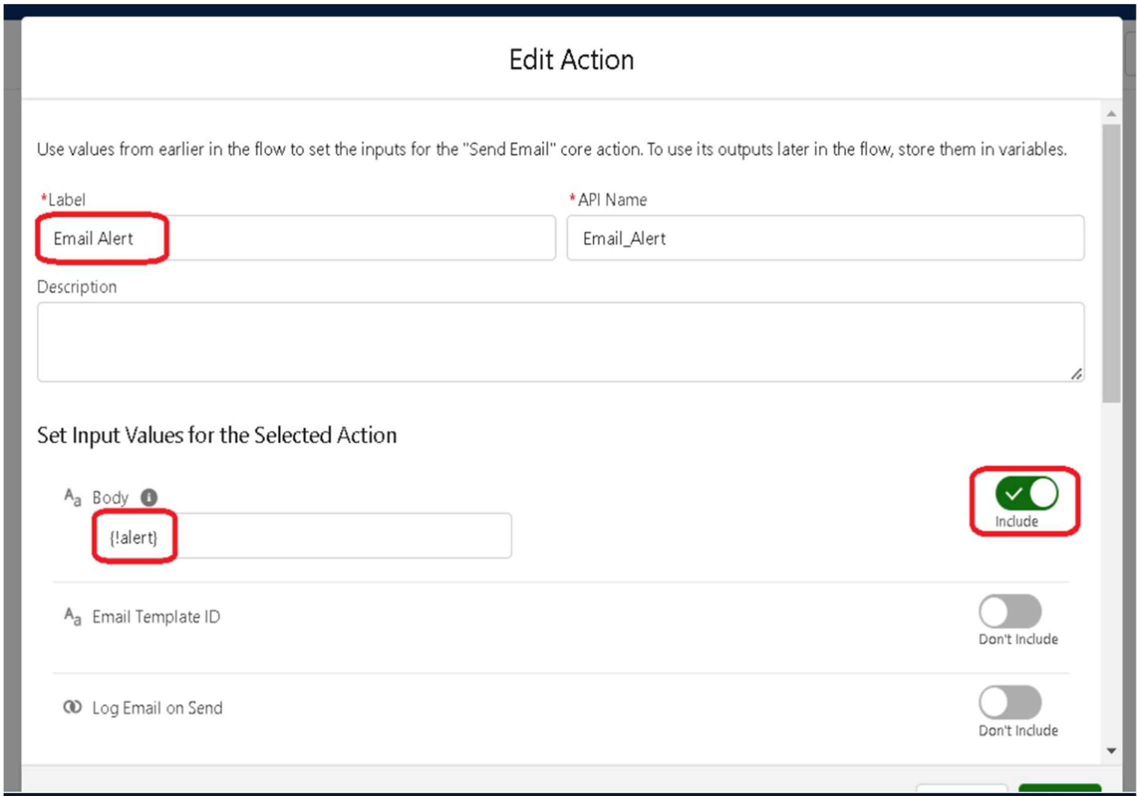
I hope this message finds you well. I wanted to take a moment to express my sincere gratitude for your recent payment for the services provided by our garage management team. Your prompt payment is greatly appreciated, and it helps us continue to provide top-notch services to you and all our valued customers.

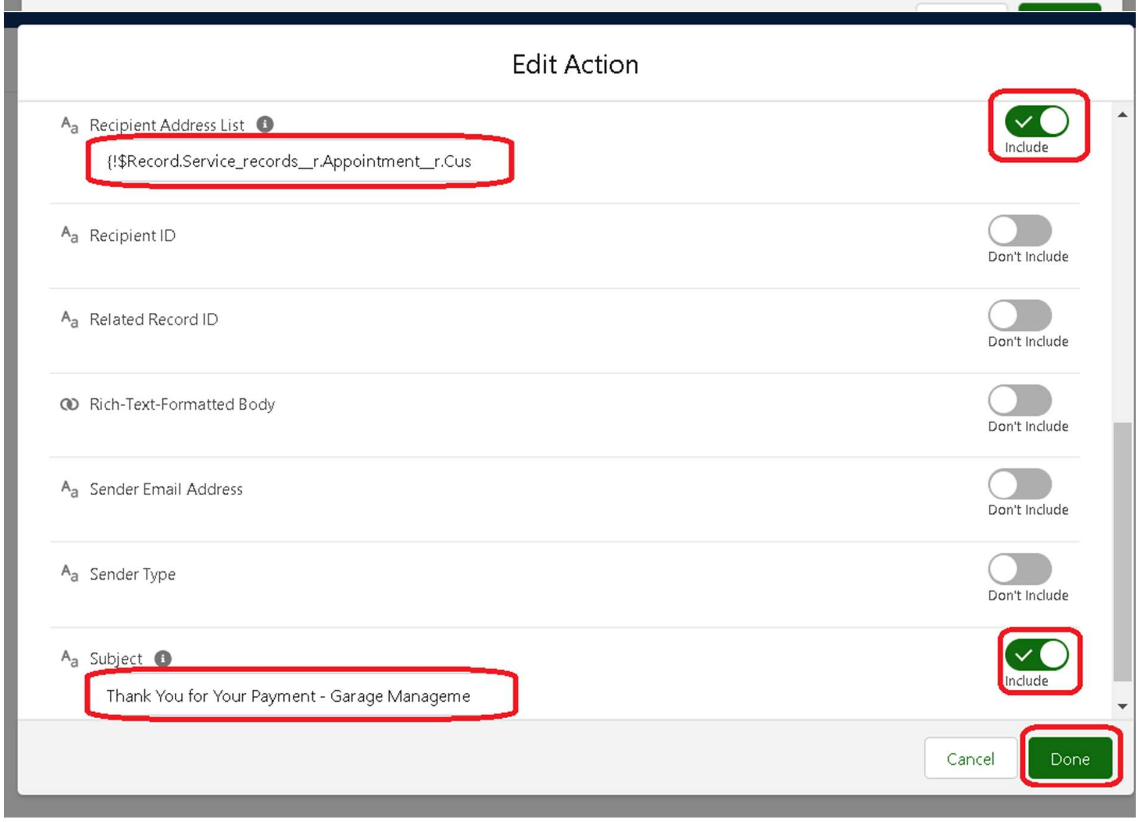
Amount paid : {!$Record.Payment_Paid__c}
Thank you for Coming .

23. Click done.



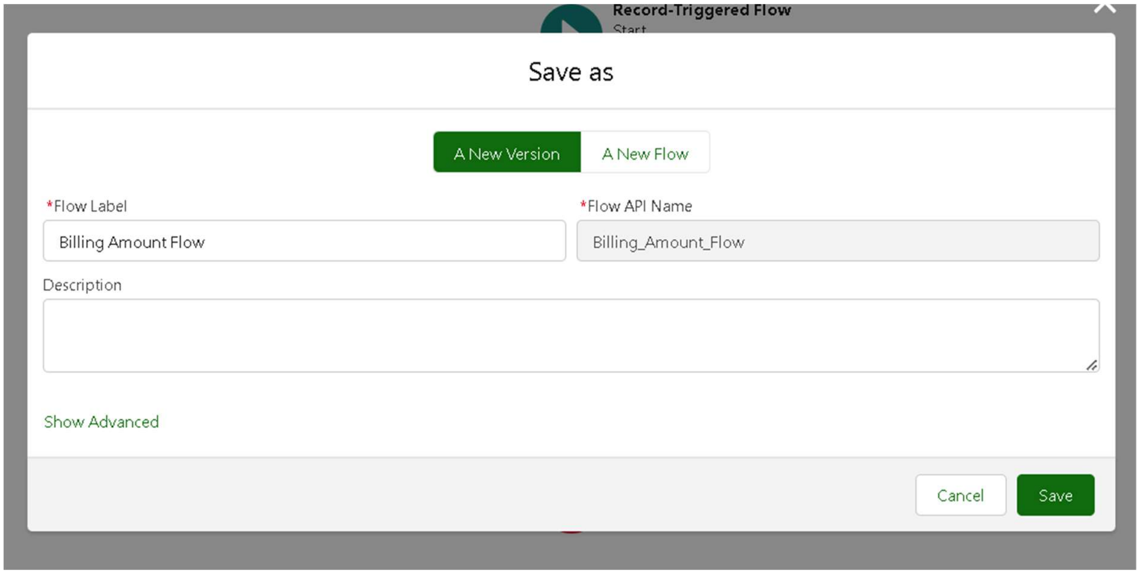
24. Now Click on Add Element , select Action.
25. Their action bar will be opened in that search for “ send email ” and click on it.
26. Give the label name as “ Email Alert”
27. API name will be auto populated.
28. Enable the body in set input values for the selected action.
29. Select the text template that created , Body : {!alert}
30. Include recipient address list select the email form the record.
31. RecipientAddressList: {!$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}
32. Include subject as “ Thank You for Your Payment - Garage Management”.
33. Click done.

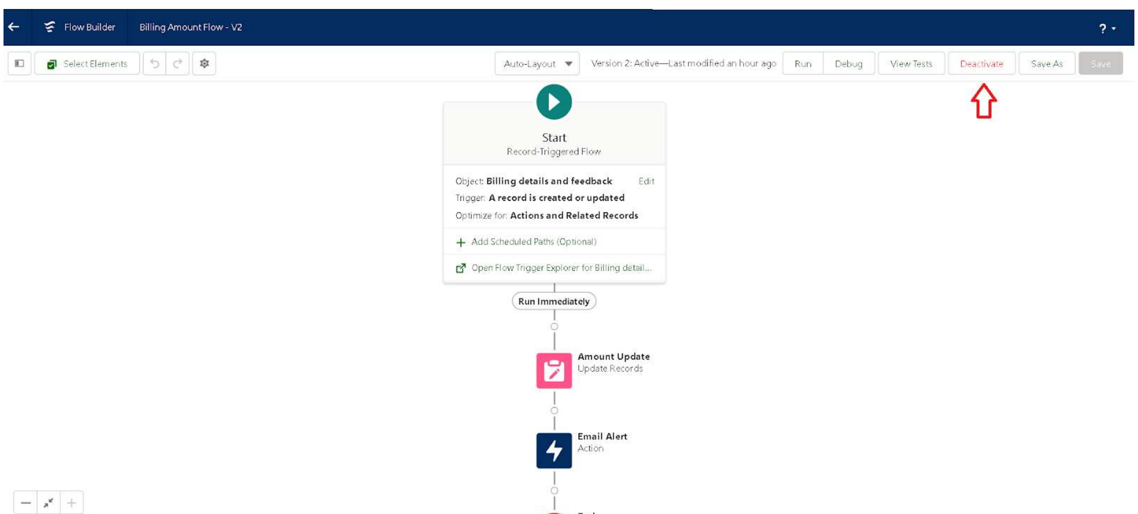




34. Click on save. Give the Flow label , Flow Api name will be autopopulated.

35. And click save, and click on activate.





Create another Flow

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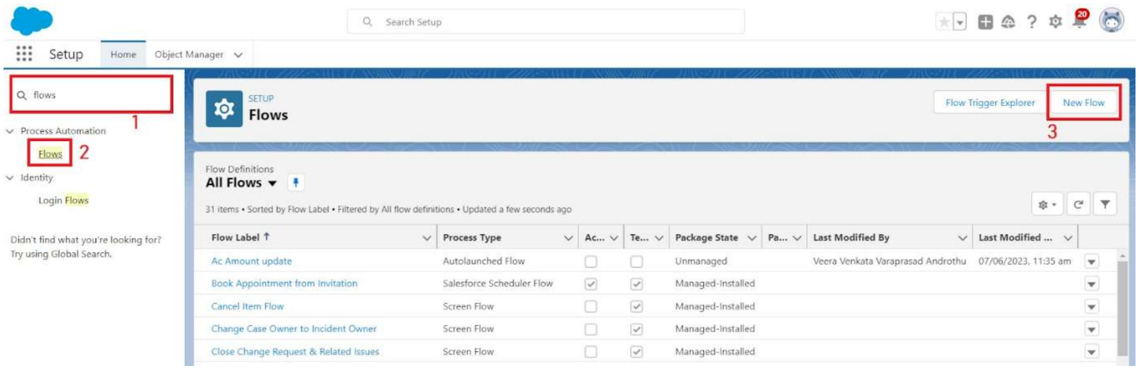
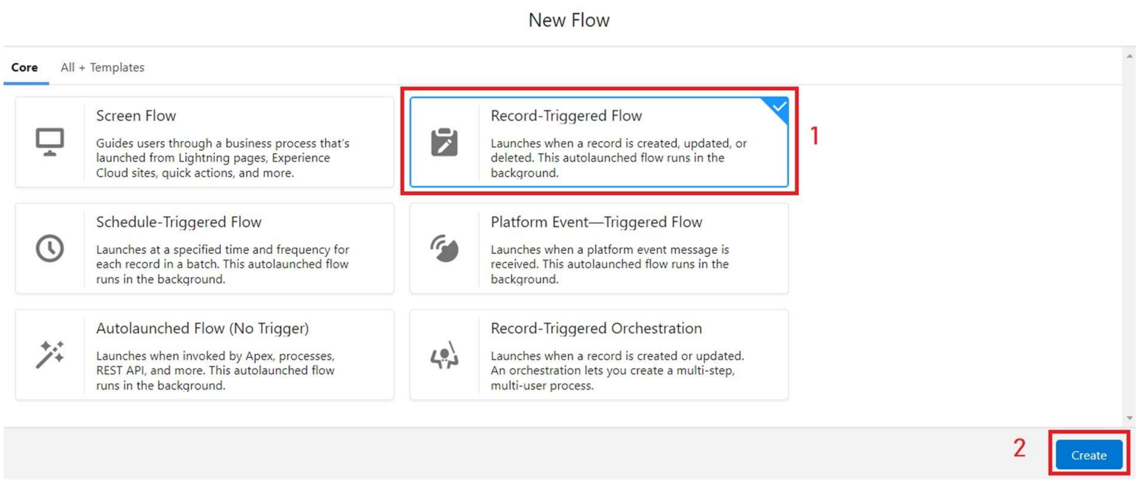
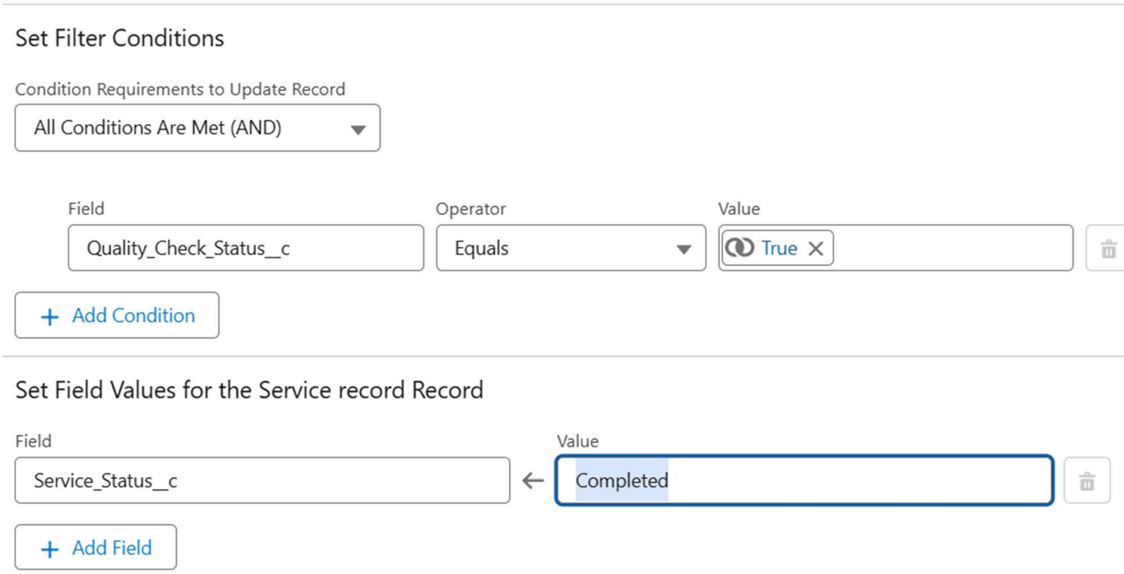


2. Select the Record-triggered flow and Click on Create.



3. Select the Object as “ **Service records**”in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimise the flow for: “Actions and Related Records” and Click on Done.
6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”.
7. Set a filter condition : All Conditions are met(AND)
8. Field : **Quality_Check_Status__c**
9. Operator : **Equals**
10. Value : **True**
11. And Set Field Values for the Billing details and feedback Record
12. Field : **Service_Status__c**
13. Value : **Completed**



14. Click On **Done**.
15. Click on **save**
16. Given the Flow label as **Update Service Status** , Flow Api name will be auto populated.
17. And click save, and click on **activate**.