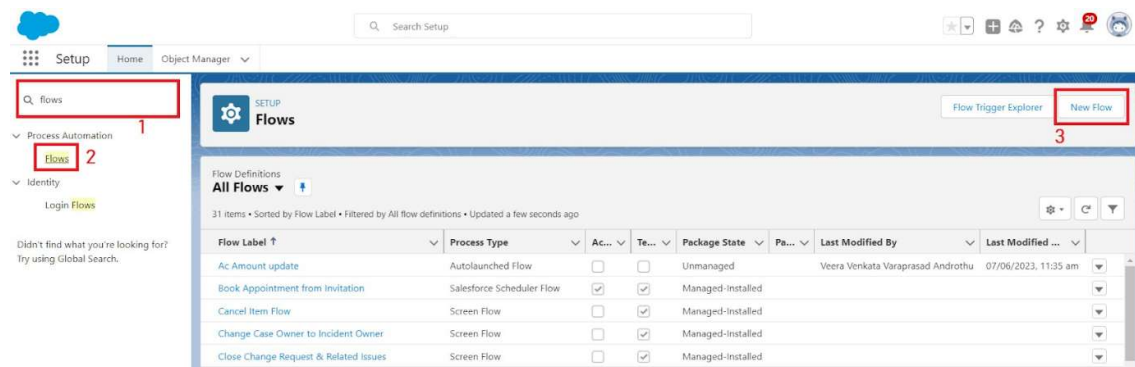


Flows

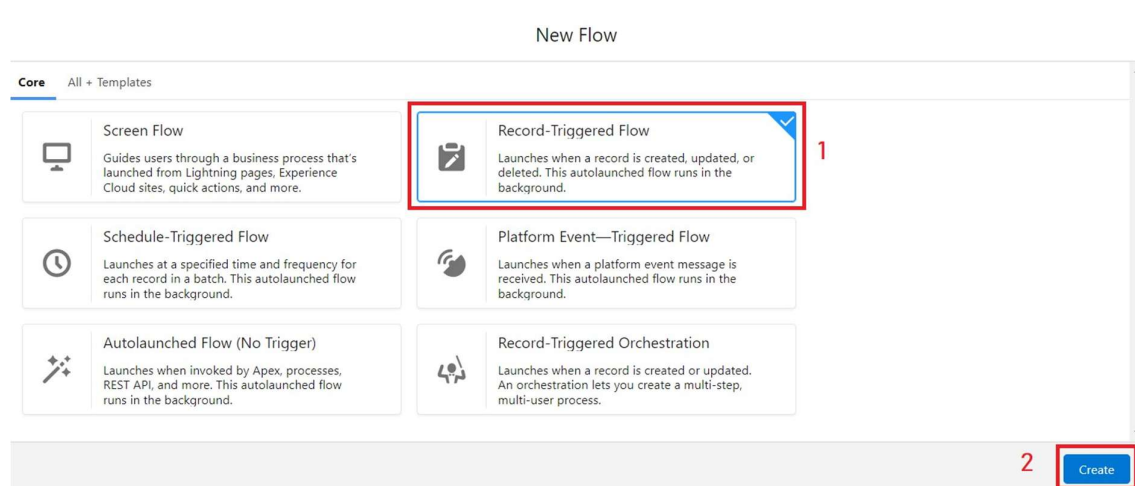
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

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.

Configure Start

Select Object

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

*Object

Billing details and feedback

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 the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

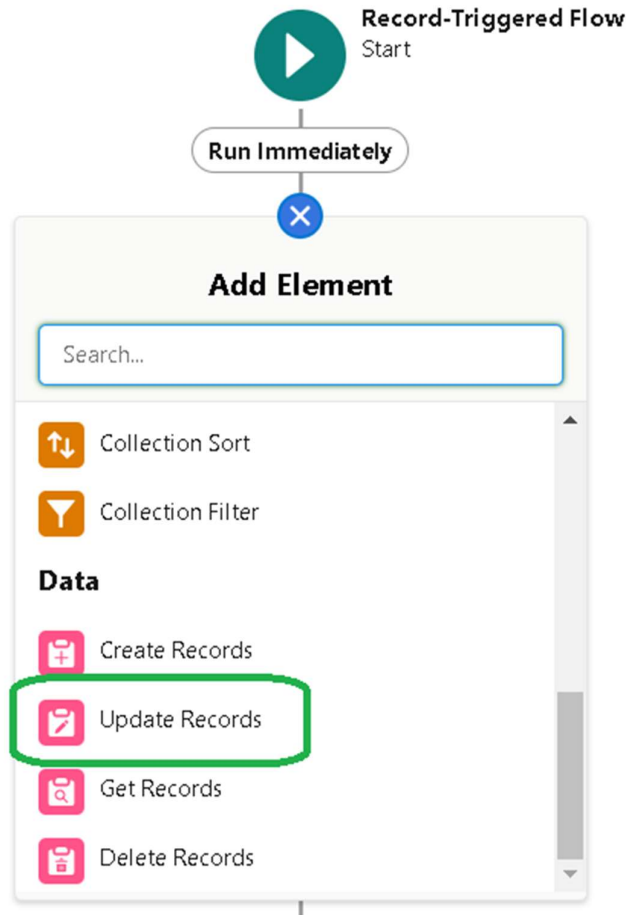
Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

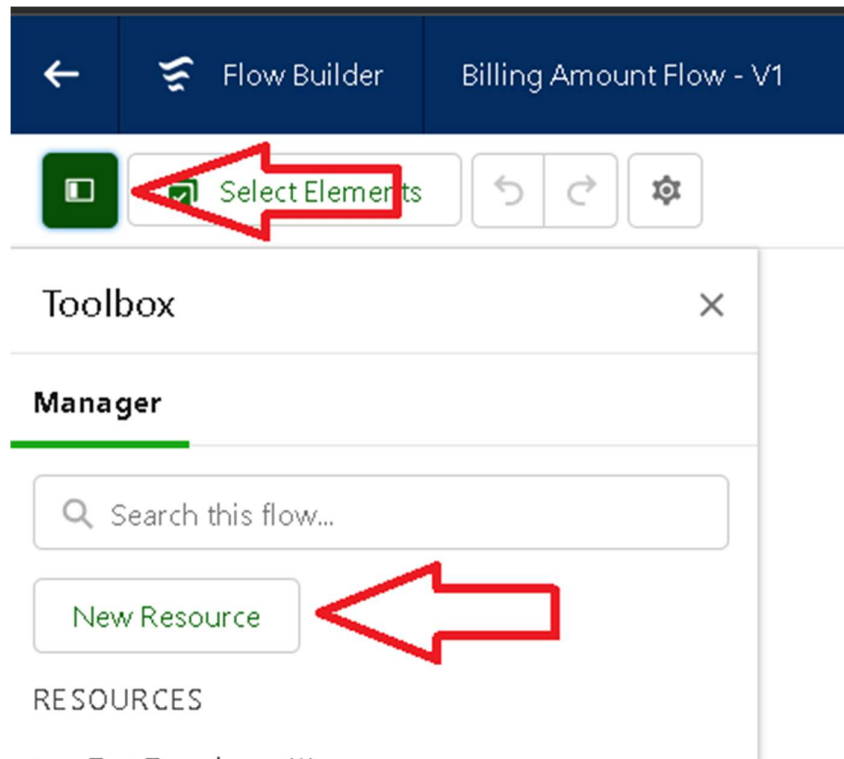
Cancel Done

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

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.

The screenshot shows the 'Edit Text Template' interface. The 'API Name' field is highlighted with a red box and contains the text 'alert'. The 'Body' field is also highlighted with a red box and contains the text 'Dear {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},'. A red arrow points to the 'View as Plain Text' dropdown menu. Another red arrow points to the 'Done' button.

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.

Edit Action

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

*Label

Email Alert

*API Name

Email_Alert

Description

Set Input Values for the Selected Action

A_a Body ⓘ

{!alert}

✓

Include

A_a Email Template ID

Don't Include

🔗 Log Email on Send

Don't Include

Edit Action

A_a Recipient Address List ⓘ

{!\$Record.Service_records__r.Appointment__r.Cus

✓

Include

A_a Recipient ID

Don't Include

A_a Related Record ID

Don't Include

🔗 Rich-Text-Formatted Body

Don't Include

A_a Sender Email Address

Don't Include

A_a Sender Type

Don't Include

A_a Subject ⓘ

Thank You for Your Payment - Garage Manageme

✓

Include

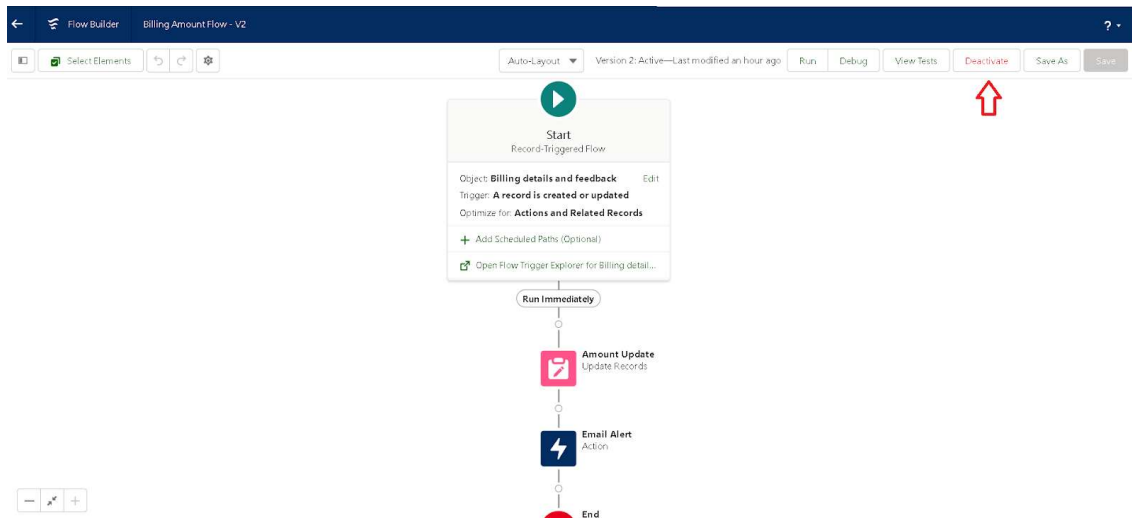
Cancel

Done

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

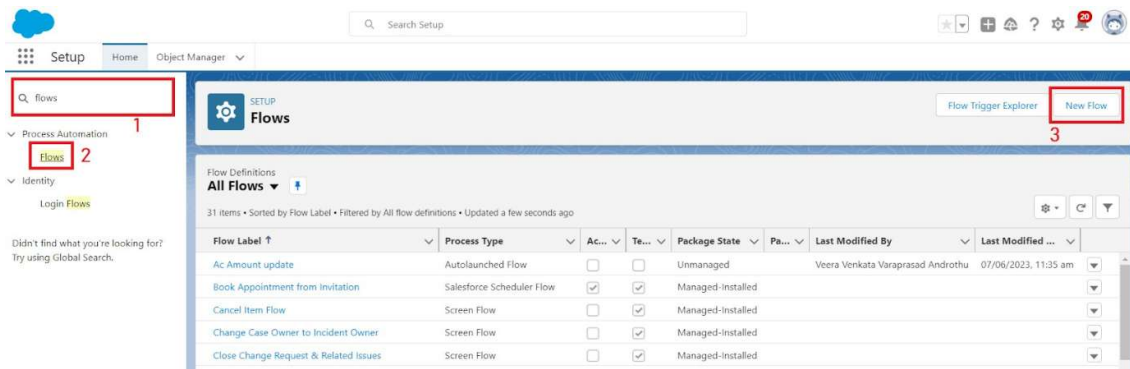
35. And click save, and click on activate.

The screenshot shows a 'Save as' dialog box for a 'Record-Triggered Flow'. At the top, there are two buttons: 'A New Version' (highlighted in green) and 'A New Flow'. Below these are two input fields: '*Flow Label' with the text 'Billing Amount Flow' and '*Flow API Name' with the text 'Billing_Amount_Flow'. There is also a 'Description' text area and a 'Show Advanced' link. At the bottom right, there are 'Cancel' and 'Save' buttons.

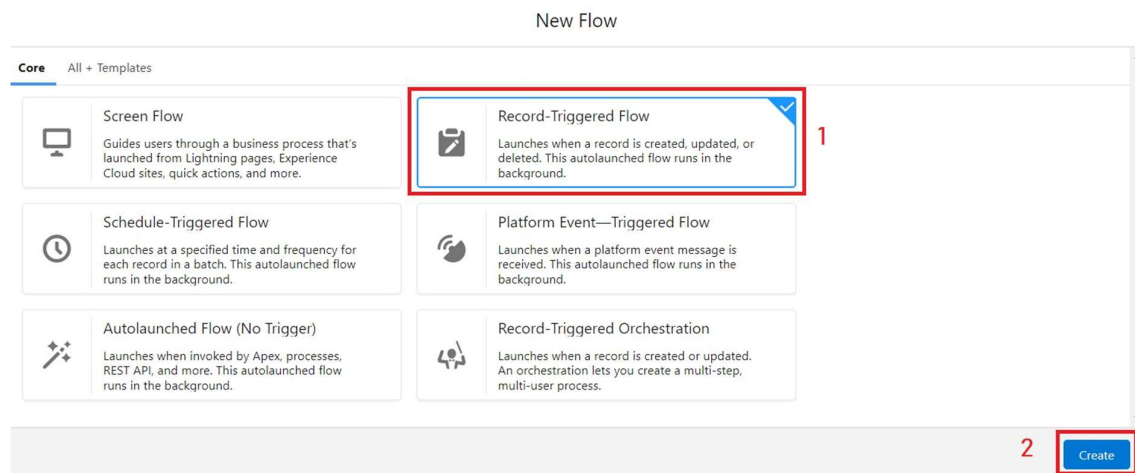


Create another Flow

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 “**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**

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▼

Field	Operator	Value	
Quality_Check_Status__c	Equals ▼	True ×	

+ Add Condition

Set Field Values for the Service record Record

Field	Value	
Service_Status__c	← Completed	

+ Add Field

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**.