WhatsNext Vision Motors
Salesforce CRM Implementation

## Phase 7

Automation – Record Triggered Flow Creation

1. Phase Overview

Phase 7 focuses on automating business processes using Record-Triggered Flows. Two flows are created: auto-assigning the nearest dealer and sending test drive reminder emails.
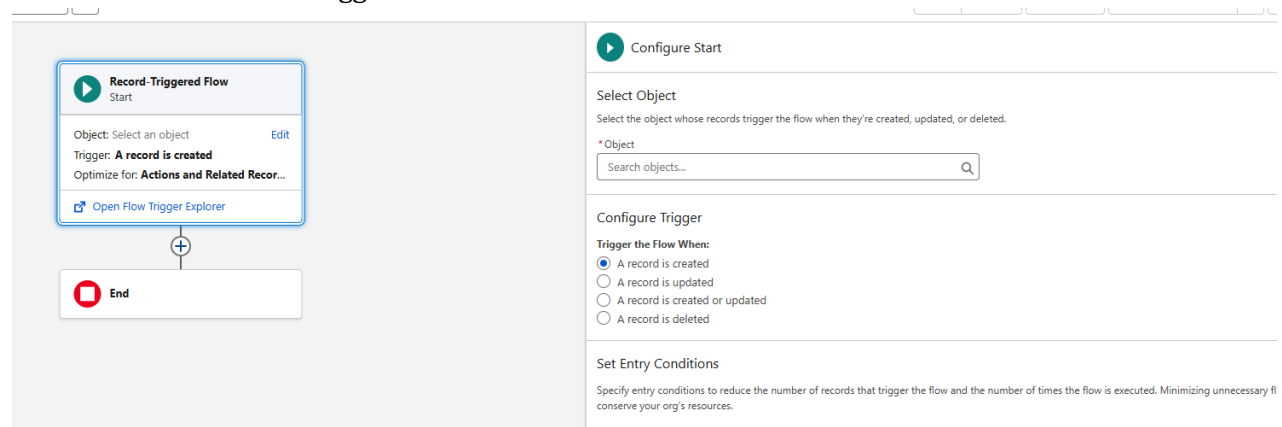
2. Record-Triggered Flow: Auto Assign Nearest Dealer

Steps to create the flow:

1. Go to Setup and search for Flows in Quick Find
2. Click Flows → New Flow
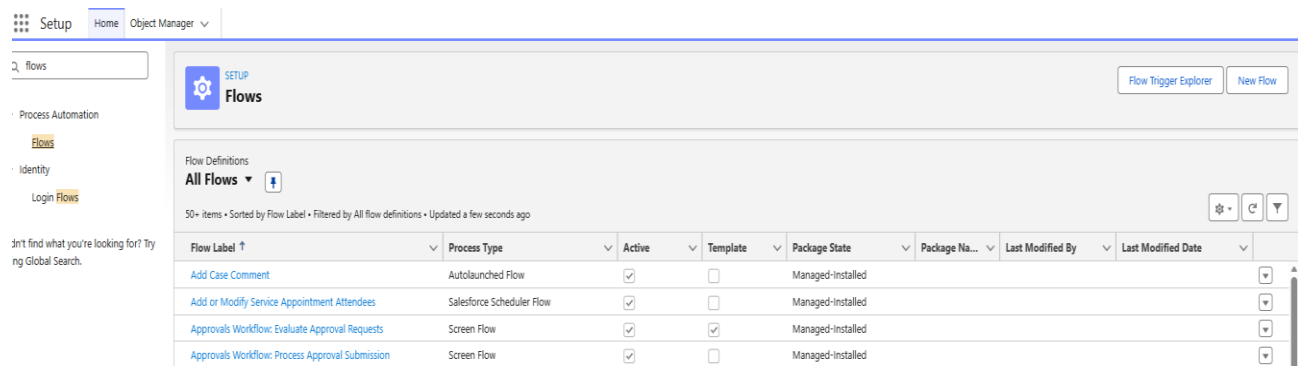
3. Select Start From Scratch → Next
4. Select Record-Triggered Flow → Create

5. Select Object as Vehicle_Order__c
6. Trigger the flow when record is created
7. Set Entry Condition: Status__c equals Pending

Get Customer Information:

- Add Get Records element
- Label: Get Customer Information
- Object: Vehicle_Customer__c
- Condition: Id equals {!$Record.Vehicle_Customer__c}

Get Records

*Label
Get Customer Information

*API Name
Get_Customer_Information

Description

Get Records of This Object

*Object
Vehicle Customer

Filter Vehicle Customer Records

Condition Requirements
All Conditions Are Met (AND)

Field	Operator	Value
Aa Record ID ✕	Equals	Aa ... Vehicle_Order__c > Customer ✕

+ Add Condition

Sort Vehicle Customer Records

Sort Order
Not Sorted   ⚠ If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store
⦿ Only the first record
◯ All records, up to a specified limit
◯ All records

How to Store Record Data

Get Nearest Dealer:

- Add Get Records element
- Label: Get Nearest Dealer
- Object: Vehicle_Dealer__c
- Condition: Dealer_Location__c equals Customer Address

Assign Dealer to Order:

- Add Update Records element

- Label: Assign Dealer to Order
- Use IDs and values from record

Update Records ∧

*Label
Assign Dealer to Order

*API Name ⓘ
Assign_Dealer_to_Order

Description

*How to Find Records to Update and Set Their Values
- ◯ Use the vehicle order record that triggered the flow
- ◯ Update records related to the vehicle order record that triggered the flow
- ◯ Use the IDs and all field values from a record or record collection
- ⦿ Specify conditions to identify records, and set fields individually

Save Flow with label Auto Assign Dealer and Activate it.

3. Record-Triggered Flow: Test Drive Reminder Email
- Create a Record-Triggered Flow
- Select Object as Vehicle_Test_Drive__c
- Trigger when record is created or updated
- Entry Condition: Status__c equals Scheduled

Scheduled Path Configuration:

- Add Scheduled Path
- Label: Reminder Before Test Drive
- Time Source: Test_Drive_Date__c
- Offset: 1 Day Before

Send Reminder Email:

- Get Customer Information using Get Records
- Use Send Email action
- Subject: Reminder: Your Test Drive is Tomorrow
- Recipient: Customer Email
- Save flow as Test Drive Reminder and Activate

4. Phase 7 Outcome
- Nearest dealer is automatically assigned to orders
- Customers receive timely test drive reminder emails
- Manual effort is reduced through automation