

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

The screenshot shows the Salesforce Setup page with the 'Flows' tab selected. The left sidebar includes links for Process Automation, Identity, and Login Flows. A global search bar at the top left contains the text 'flows'. The main area displays a table of existing flows, with the first four rows shown below:

Flow Label	Process Type	Active	Template	Package State	Package Name	Last Modified By	Last Modified Date
Add Case Comment	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

3. Select Start From Scratch → Next
4. Select Record-Triggered Flow → Create

The screenshot shows the 'Record-Triggered Flow' configuration screen. On the left, a visual flow diagram starts with a 'Record-Triggered Flow Start' step, followed by a plus sign connector, and ends with an 'End' step. The right side of the screen is divided into three sections: 'Configure Start', 'Configure Trigger', and 'Set Entry Conditions'.

- Configure Start:** Shows the 'Object' field set to 'Vehicle_Order__c' and the 'Trigger' field set to 'A record is created'.
- Configure Trigger:** Shows the 'Trigger the Flow When' section with the radio button selected for 'A record is created'.
- Set Entry Conditions:** Contains a note about minimizing unnecessary flow execution.

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	* API Name <small>(i)</small>
Get Customer Information	Get_Customer_Information
Description	
<hr/> <hr/>	

Get Records of This Object

* Object

Vehicle Customer

Filter Vehicle Customer Records

Condition Requirements

All Conditions Are Met (AND) <small>(▼)</small>

Field	Operator	Value
A_a Record ID <small>(X)</small>	Equals <small>(▼)</small>	A_a ... Vehicle_Order__c > Customer <small>(X)</small>
+ Add Condition		

Sort Vehicle Customer Records

Sort Order

Not Sorted <small>(▼)</small>	<small>⚠ If you store only the first record, filter by a unique field, such as ID.</small>
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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

The screenshot shows the 'Assign Dealer to Order' flow step configuration. It includes fields for Label (Assign Dealer to Order), API Name (Assign_Dealer_to_Order), and Description. There is also a 'How to Find Records to Update and Set Their Values' section with a radio button for 'Specify conditions to identify records, and set fields individually'.

***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