

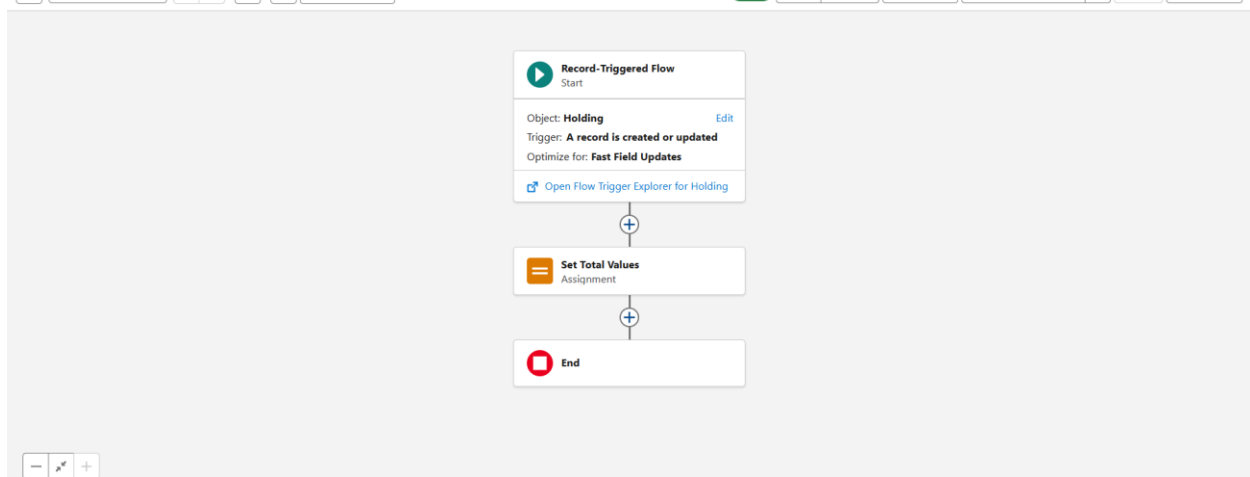
Phase 7 – Automation / Flow (Optional)

Objective: Automate repetitive tasks.

1. **Flow to update Portfolio P&L** if Lookup relationship is used.
2. **Auto-create Price Snapshot** on Holding updates.
3. Trigger flow on **Holding create/update**.

Tips:

- Include error handling.
- Test thoroughly before production use.



```
graph TD; Start([Record-Triggered Flow Start]) --> SetTotalValues[Set Total Values Assignment]; SetTotalValues --> End([End]);
```

Record-Triggered Flow
Start
Object: **Holding** [Edit](#)
Trigger: **A record is created or updated**
Optimize for: **Fast Field Updates**
[Open Flow Trigger Explorer for Holding](#)

Set Total Values
Assignment

End

Assignment ×

* Label * API Name

Description

Set Variable Values
Each variable is modified by the operator and value combination.

Variable	Operator	Value
<input type="text" value="...ggering Holding_c > Total Value X"/>	<input type="text" value="Equals"/>	<input type="text" value="# Total_Value_Formula X"/>

+ Add Assignment

