

# Phase 4 – Process Automation

## Step 1: Updating training statuses

Auto-Update Completion Status

Use: Record-Triggered Flow

Trigger: When a Contact\_Training\_\_c record is updated

Condition: Score\_\_c is entered AND status is not already "Completed"

Action:

- Set Completion\_Status\_\_c = Completed
- Set Completion\_Date\_\_c = Today()

The screenshot shows a Salesforce interface for a Training record. At the top, there's a navigation bar with a search bar and tabs for Home, Accounts, Contacts, Students, and Trainings. The 'Trainings' tab is selected. Below the navigation bar, the record header shows 'Training TN-0004'. The main content area has two tabs: 'Related' and 'Details'. The 'Details' tab is active, displaying a list of fields for the training record. Each field has a pencil icon for editing. The fields and their values are: Name (TN-0004), Owner (Vaishnavi Wasade), Contact (Vaishnavi Wasade), Course Date (9/27/2025), Course Name (Salesforce Course), Status (In Progress), Created By (Vaishnavi Wasade, 9/25/2025, 6:38 AM), and Last Modified By (Vaishnavi Wasade, 9/25/2025, 6:44 AM).

Training TN-0004	
Name	TN-0004
Contact	<a href="#">Vaishnavi Wasade</a>
Course Date	9/27/2025
Course Name	Salesforce Course
Status	In Progress
Created By	<a href="#">Vaishnavi Wasade</a> , 9/25/2025, 6:38 AM
Last Modified By	<a href="#">Vaishnavi Wasade</a> , 9/25/2025, 6:44 AM

Use: Record-Triggered Flow

Trigger: Contact\_Training\_\_c is updated

Contact

Ms. Vaishnavi Wasade

+ Follow























New Case

New Note

Submit for Approval

Related

Details

Contact Owner		Phone	
 <a href="#">Vaishnavi Wasade</a>			
Name		Home Phone	
Ms. Vaishnavi Wasade			
Account Name		Mobile	
			
Title		Other Phone	
			
Department		Fax	
			
Birthdate		Email	
			
Reports To		Assistant	
			
Lead Source		Asst. Phone	
			
Training Status			
In Progress			
Mailing Address		Other Address	
			
Languages		Level	
			
Created By		Last Modified By	

ActivityChatter

Filters: All time • All activities • All types

Refresh

Expand All

View All

Upcoming & Overdue

No activities to show.  
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.