

Everything You Need to Know About Salesforce Flow

By Citrin Cooperman's Digital Services Practice

September 14, 2025

Companies of all sizes rely on business processes to achieve organizational goals. Inefficiencies can arise if the company is not using technology built to do the heavy lifting. Managing these processes ad hoc often leads to problems like communications breakdowns, bottlenecks, missed deadlines, and human error.

Automating processes allows employees to focus on core responsibilities rather than repetitive tasks, saving time and resources. Using a business automation tool, like **Salesforce**, allows businesses to implement unified, real-time workflows that maximize productivity and collaboration by reducing manual effort and fast-tracking handoffs and approvals. A new feature, Salesforce Flow Builder, is the premier automation tool on the Salesforce platform, and it is essential for business leaders to be aware of the impact of these changes on their existing workflows and the opportunities this new element presents.

What is happening to Workflow Rules and Process Builder?

Salesforce **announced** that Workflow Rules and Process Builder will no longer be supported after December 31, 2025. Salesforce is urging users to migrate their automation processes to Flow Builder before the deadline to ensure uninterrupted support and access to bug fixes.

What is Salesforce Flow?

This robust suite of tools empowers businesses to automate intricate processes, amplifying efficiency and productivity. This enables users to create guided pathways within Salesforce by leading them step-by-step through specific processes.

Businesses that leverage this tool to **automate various tasks**, such as collecting customer data, updating records, and generating documents, streamline operations, save time, and minimize errors. A significant advantage of Salesforce Flow lies in the tool's capacity to design complex processes. Its visual interface simplifies the definition of logical steps, guaranteeing accurate and efficient execution.

Even better, flows are adaptable enough to suit the unique requirements of a business. Whether it is a straightforward process or a multi-departmental operation, the Salesforce Flow Builder can be tailored to match any organization's complexity.

Key advantages of Salesforce Flow

Salesforce Flow offers potent automation features for businesses. Here are some of the key reasons companies start and continue using Salesforce Flow:

1. Increased resource utilization

Automation enhances resource utilization by optimizing processes. For example, a configured automation tool that issues alerts for inventory shortages or supply chain delays can cut costs and prevent losses.

2. Reduced manual tasks to save time

All repetitive tasks share a common trait — they follow predictable patterns. A company can reclaim valuable time and eliminate potential errors by automating follow-up actions with Salesforce Flow. Triggered flows free the team from repetitive tasks and allow them to focus on their core roles. For tasks requiring checks on multiple records at specific times, automation can be scheduled to complete large jobs efficiently in one batch.

Manual tasks not only divert team members from their primary responsibilities but can also lead to oversight as they accumulate. For instance, if the sales team must manually check for new opportunities, they may miss out on timely follow-ups with prospects. An automated process ensures immediate notification of the relevant sales representative whenever a new opportunity arises.

Triggered actions automate follow-up tasks after a trigger event occurs, reducing manual workload and ensuring prompt actions. For tasks involving multiple records, batch jobs are ideal, as they execute predictable processes at specified dates and times, minimizing errors and delays.

3. Visual workflows create a more intuitive user experience

With Lightning Flow, Salesforce Flow's visual workflows feature, business processes can be easily designed and modified using an intuitive drag-and-drop interface. This simplifies complex processes by breaking them down into visual segments that enhance user understanding. Each step's appearance and functionality can be customized to include component setup, step actions, and more. By creating visually appealing experiences with Salesforce Flow, automation becomes both efficient and accessible to everyone within the organization.

4. Integrated data

Data integration is pivotal in Salesforce Flow, facilitating seamless interaction with external systems and databases to ensure real-time data availability for decision making and automation.

By gathering data from multiple sources, like **CRM and ERP systems** or third-party applications, businesses can consolidate and synchronize their data, fostering a holistic view of customer interactions and operations. This integration dismantles data silos, ensuring the flow has access to accurate and current information.

Unleash the power of Salesforce Flow with Citrin Cooperman

Salesforce Flow is vital for automating business processes and enhancing productivity. It empowers teams to concentrate on strategic initiatives while effortlessly managing repetitive tasks, leading to increased efficiency, time savings, and resource optimization. Salesforce Summer 2024 updates release provides even more functionality upgrades to Flow.

Citrin Cooperman's **Digital Services Practice** can help you delve deeper into utilizing flow automation effectively. For further resources, request a **Salesforce Flow Migration Assessment** where a Citrin Cooperman Salesforce engineer will assess your workflow tools and provide an initial estimation of the costs and scope of migrating to Salesforce Flow.

SALESFORCE TEAM



Paul Clayton
pclayton@citrincooperman.com



Patrick Fallon
pfallon@citrincooperman.com



Christopher Hunter
chunter@citrincooperman.com