

**Exp .No : 7**

**Date :**

## **DEVELOP A SIMPLE EMAIL AUTOMATION SERVICE USING SALESFORCE**

### **AIM:**

To develop a simple email automation service using Salesforce.

### **PROCEDURE:**

#### **1. Log in to Salesforce:**

- Open your browser and go to [Salesforce](https://www.salesforce.com) and log in with your credentials.

#### **2. Go to Setup:**

- Click the **Setup** gear icon at the top-right of the Salesforce interface and select **Setup**.

#### **3. Open Flow Builder:**

- In the left-hand menu, search for **Flow** using the Quick Find box.
- Click on **Flows** under **Process Automation**.

#### **4. Create a New Flow:**

- Click on **New Flow**.
- You will be prompted to choose the flow type. Select **Record-Triggered Flow** to start the automation when a record is created or updated.
- Click **Create**.

#### **5. Configure Trigger:**

- Select the **Object** you want to trigger the flow for (e.g., **Lead, Account, Contact**, etc.).
- Choose whether to trigger the flow **when a record is created, updated, or created or updated**.
- Set the condition that triggers the email (e.g., when a lead's status is set to "Qualified").

#### **6. Add an Action (Send Email):**

- In the Flow Builder, click the + icon to add an element.
- From the menu, select **Action**.
- In the **Action** type, search for **Send Email**.

- You will need to configure:
  - **Recipient:** Choose the email field from the record (e.g., Lead's email).
  - **Email Template:** Select an existing template or create a new one.
  - **From Address:** Choose an appropriate "From" email address (either system email or a user's email). If **Send Email** is not directly available, you'll need to create an **Email Alert** first.

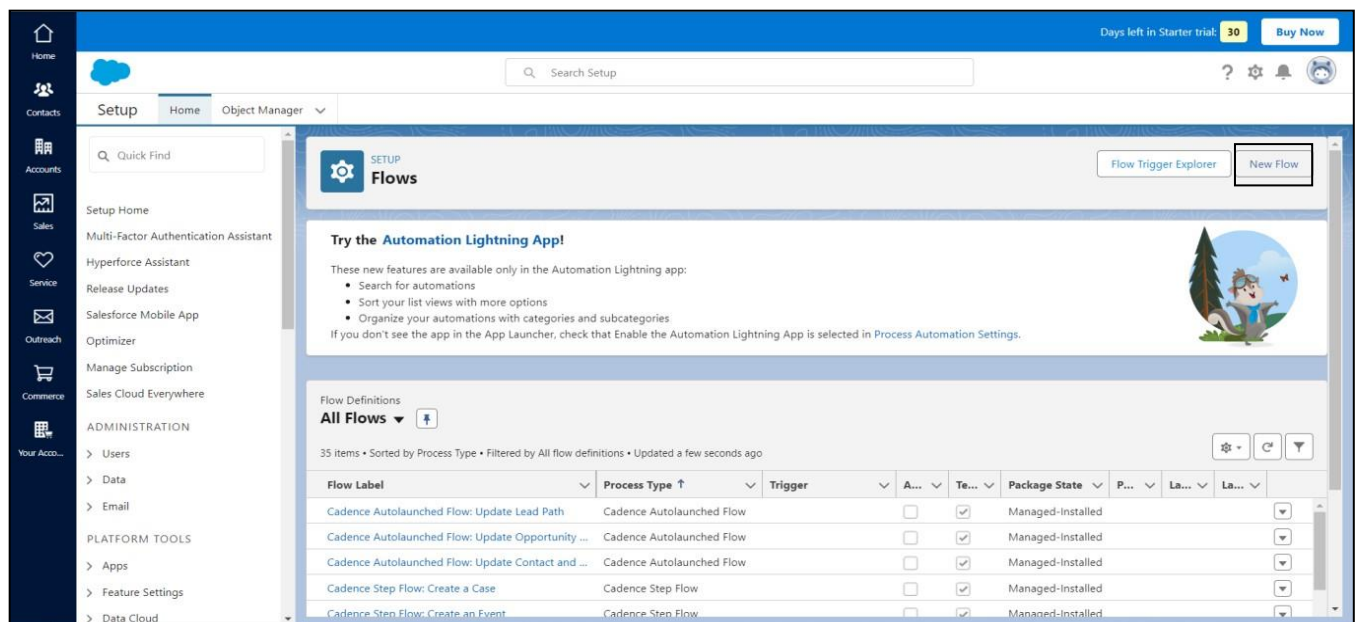
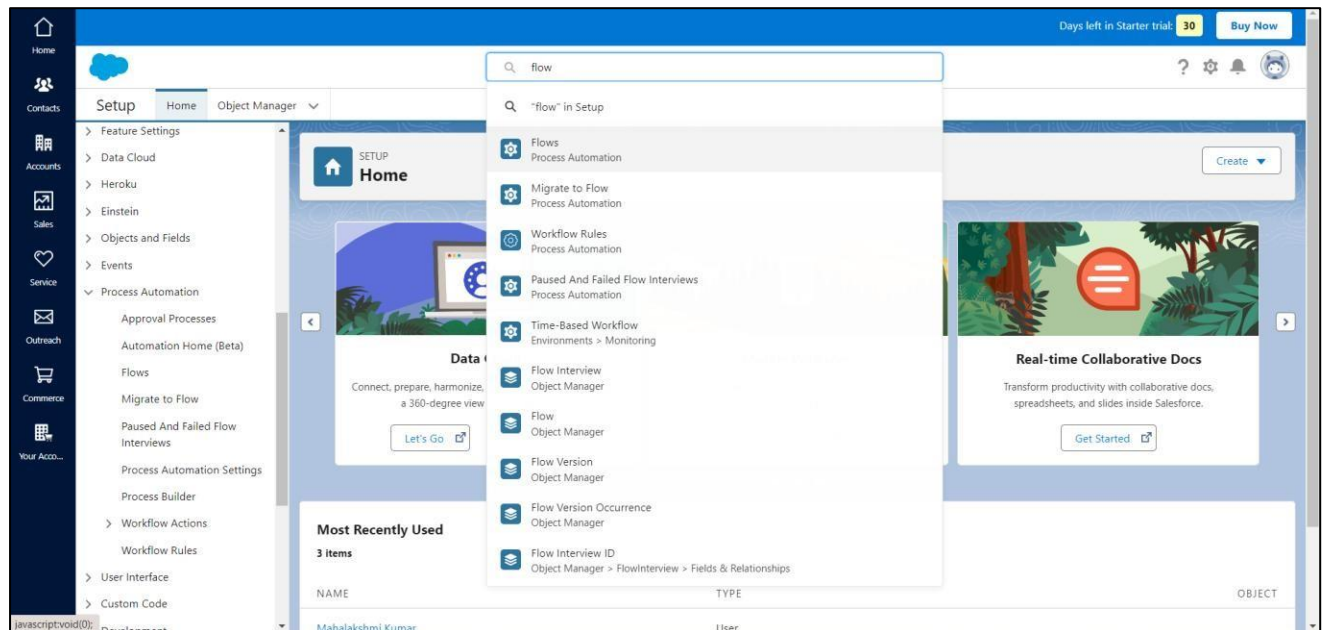
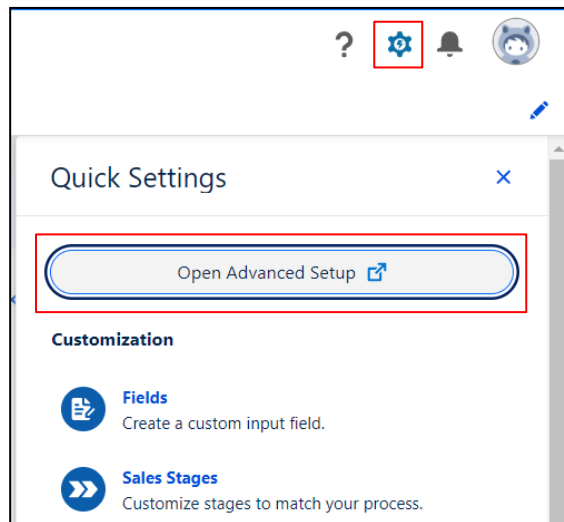
#### **7. Activate and Save the Flow:**

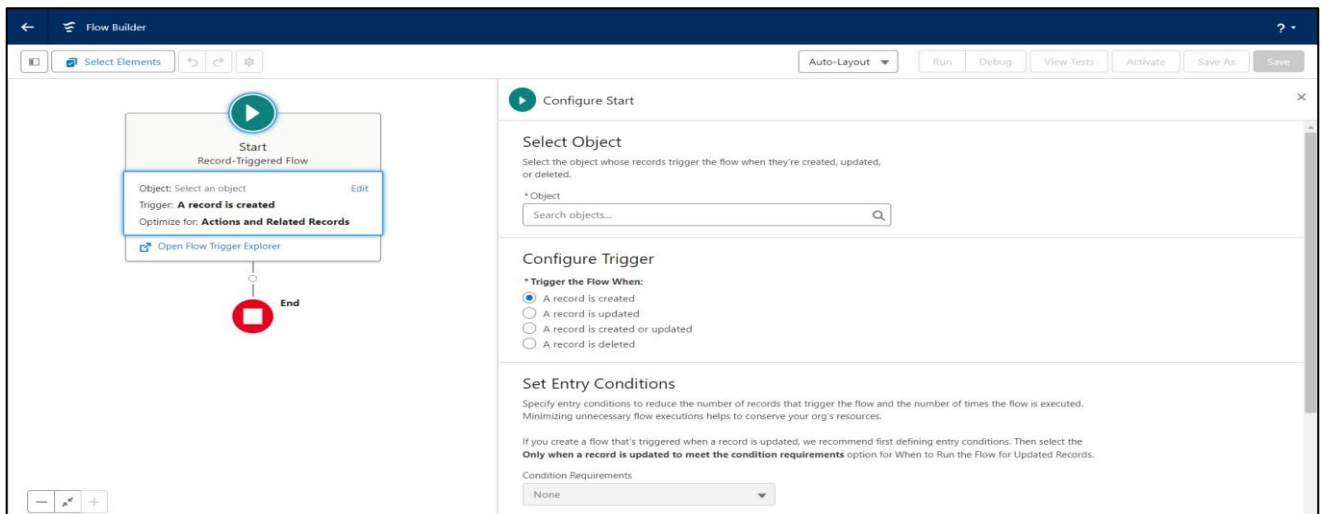
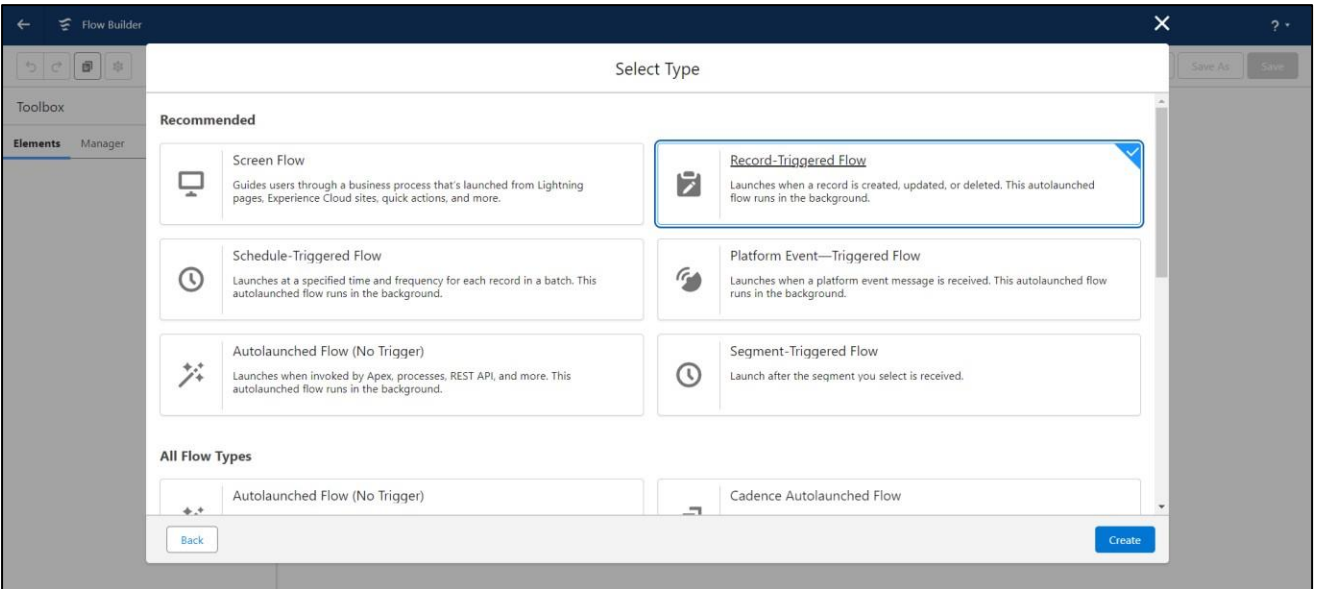
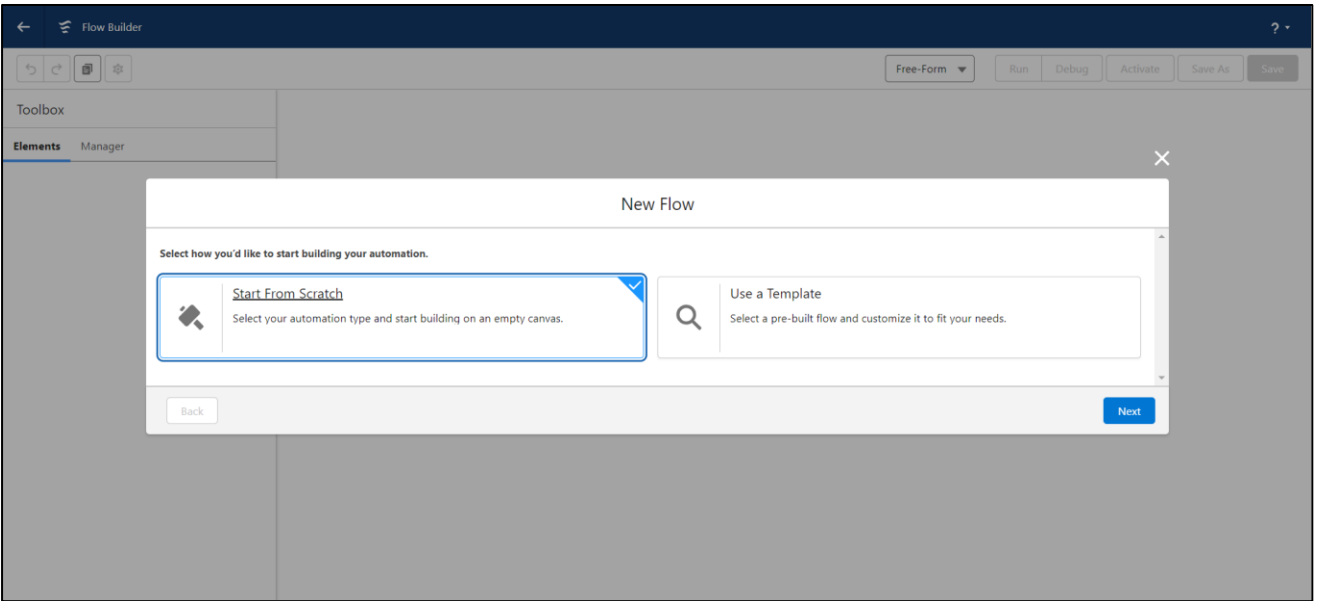
- Once you've configured the email sending action, click **Save**.
- Click **Activate** to make the flow live.

#### **8. Test Your Automation:**

- To ensure your automation works, create a new lead or update an existing record based on the criteria you've set in the flow.
- Check the recipient's inbox to confirm the email is sent.

### **OUTPUT:**





Flow Builder

Select Elements

Auto-Layout

Run

Debug

View Tests

Activate

Save As

Save

Start

Record-Triggered Flow

Object: **Lead**

Trigger: **A record is created**

Conditions: **1**

Optimize for: **Actions and Related Records**

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Lead

End

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

\* Object

Lead

Configure Trigger

\* Trigger the Flow When:

☒ A record is created

☐ A record is updated

☐ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Flow Builder

Select Elements

Auto-Layout

Run

Debug

View Tests

Activate

Save As

Save

Start

Record-Triggered Flow

Object: **Lead**

Trigger: **A record is created**

Conditions: **1**

Optimize for: **Actions and Related Records**

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Lead

End

Configure Start

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field

Status

Operator

Equals

Value

Qualified

+ Add Condition

\* Optimize the Flow for:

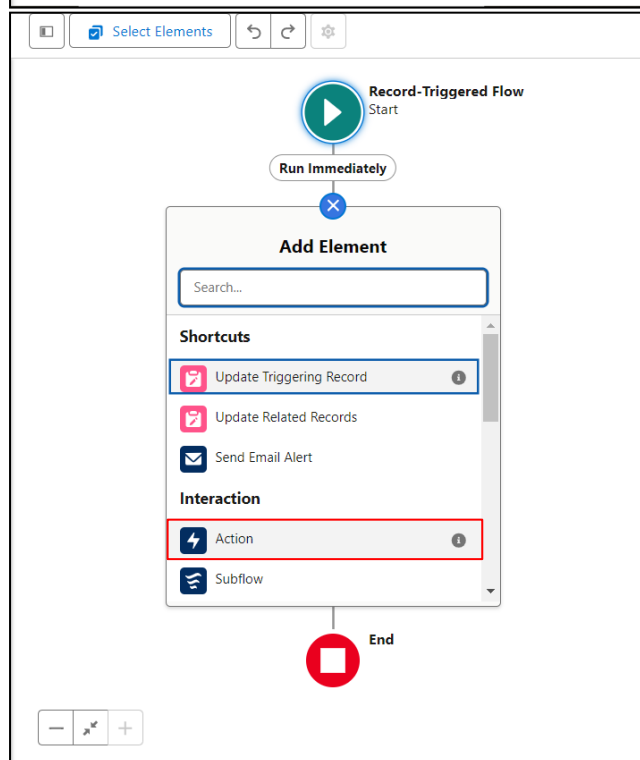
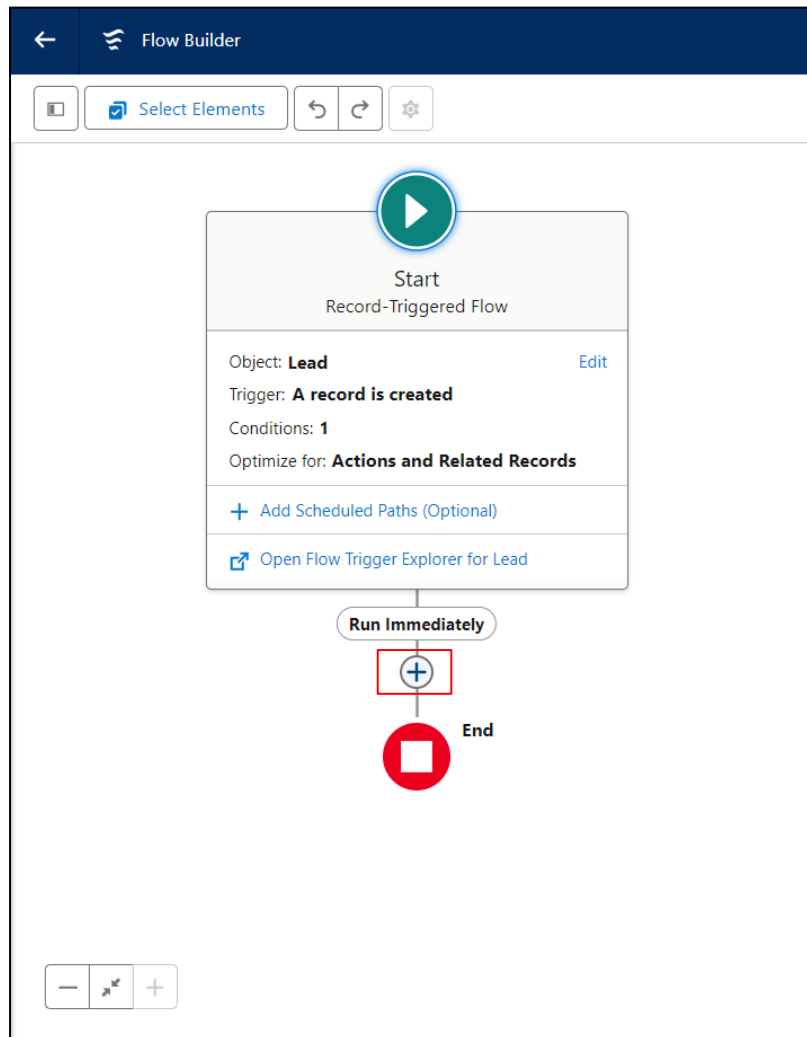
Fast Field Updates

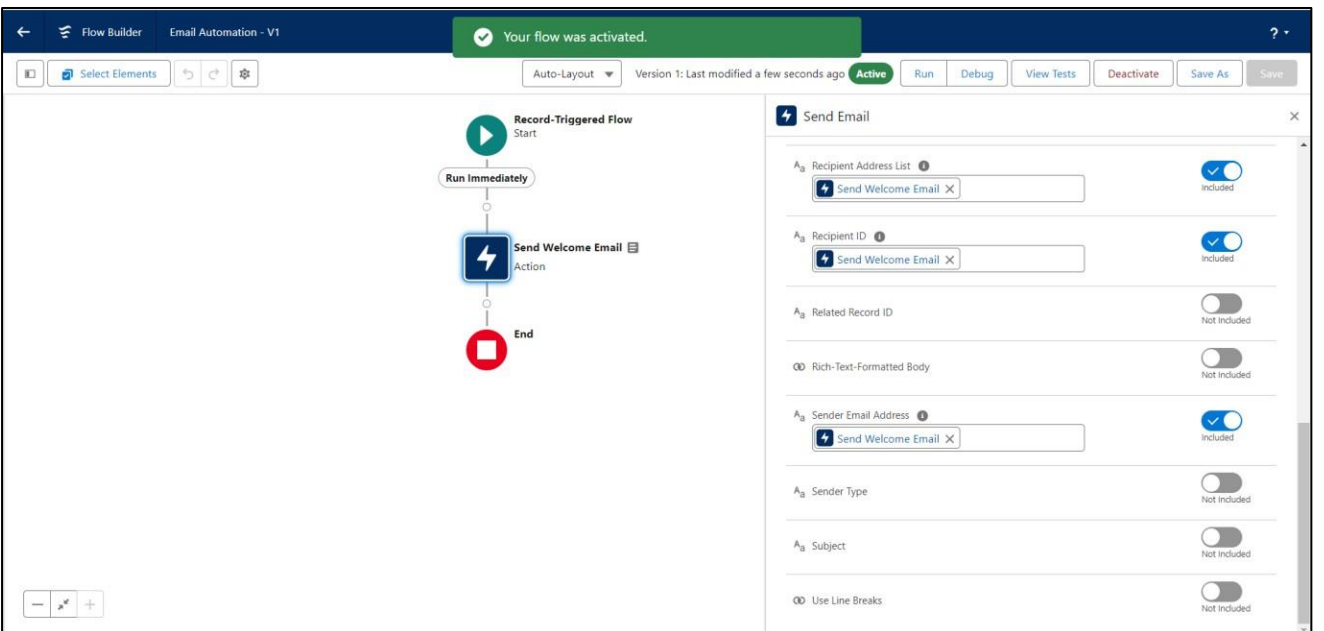
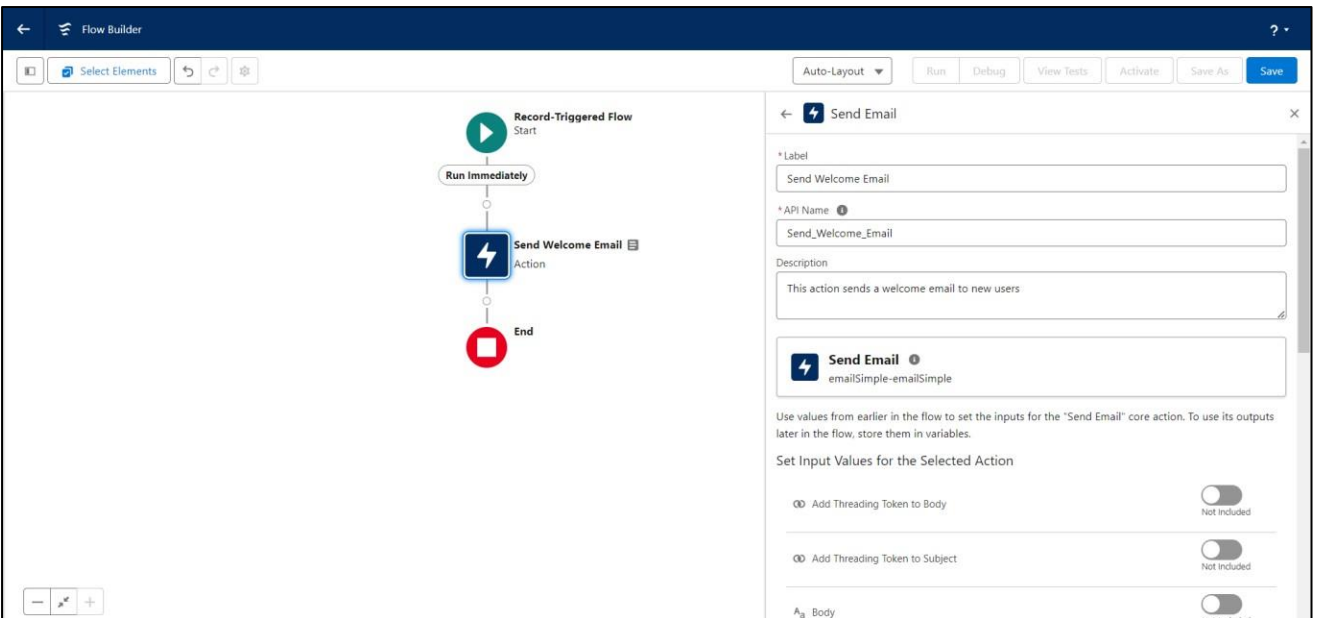
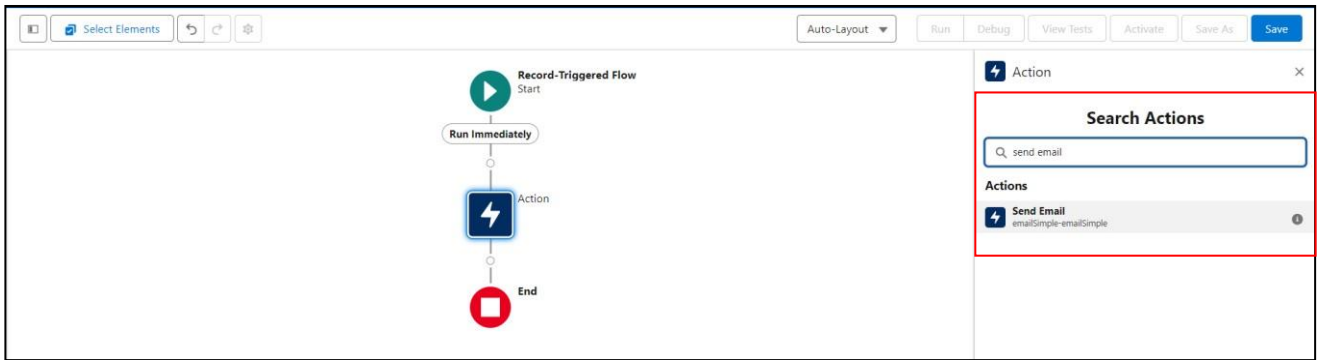
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed





## RESULT:

Thus, to develop a simple email automation service using Salesforce was completed successfully.