

Ex. No. 7

## **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 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").

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## 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:
  - o Recipient: Choose the email field from the record (e.g., Lead's email).
  - o Email Template: Select an existing template or create a new one.
  - o 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. (Optional) Create an Email Alert:

- If Send Email doesn't appear in the action list, go to Setup > Email Alerts.
- Click New Email Alert, give it a name, and select:
  - o Object: The same object as in the Flow (e.g., Lead).
  - o Email Template: Choose a predefined template or create a new one.
  - o Recipient: Add who will receive the email (e.g., the Lead's email).
- After creating, go back to your Flow and choose Send Email using this Email Alert.

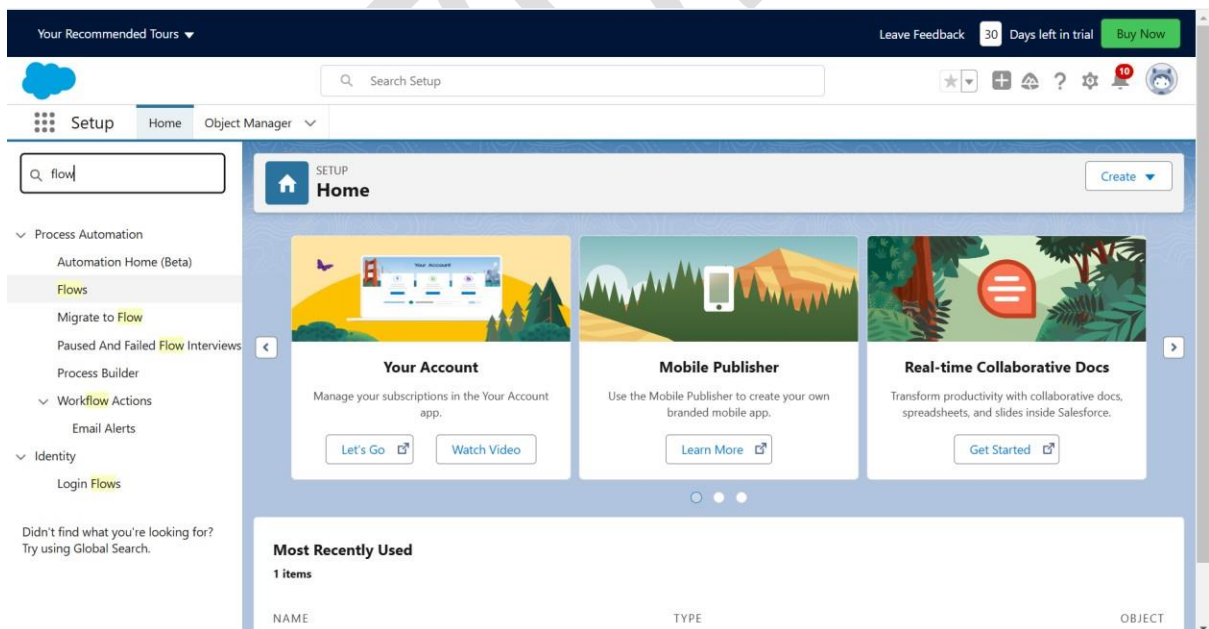
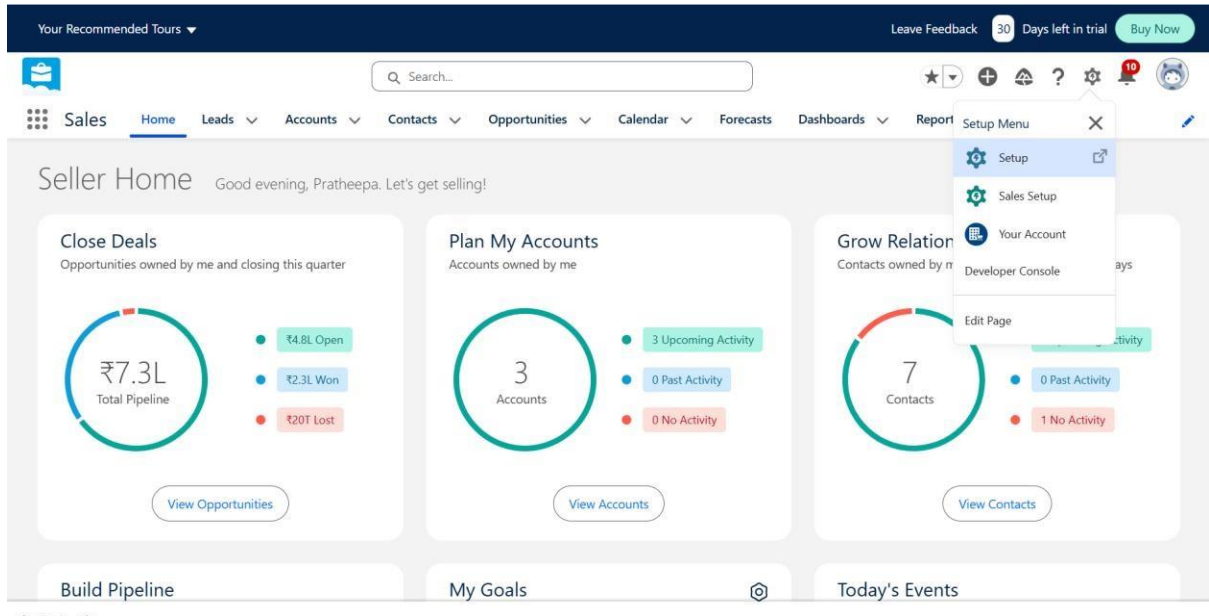
## 8. Activate and Save the Flow:

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

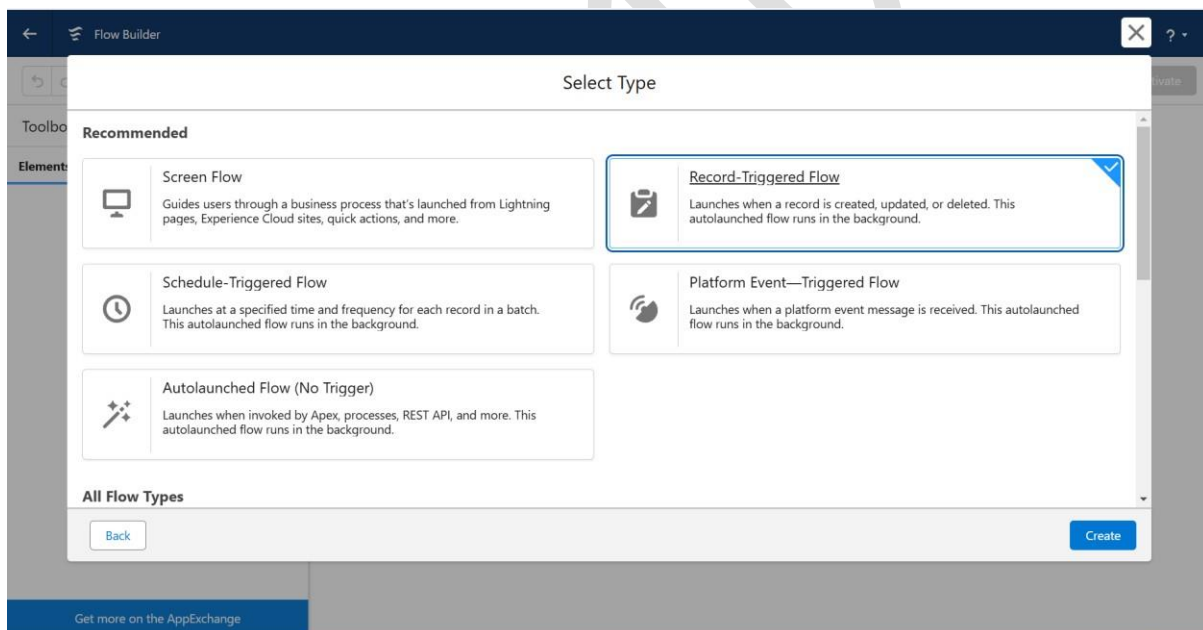
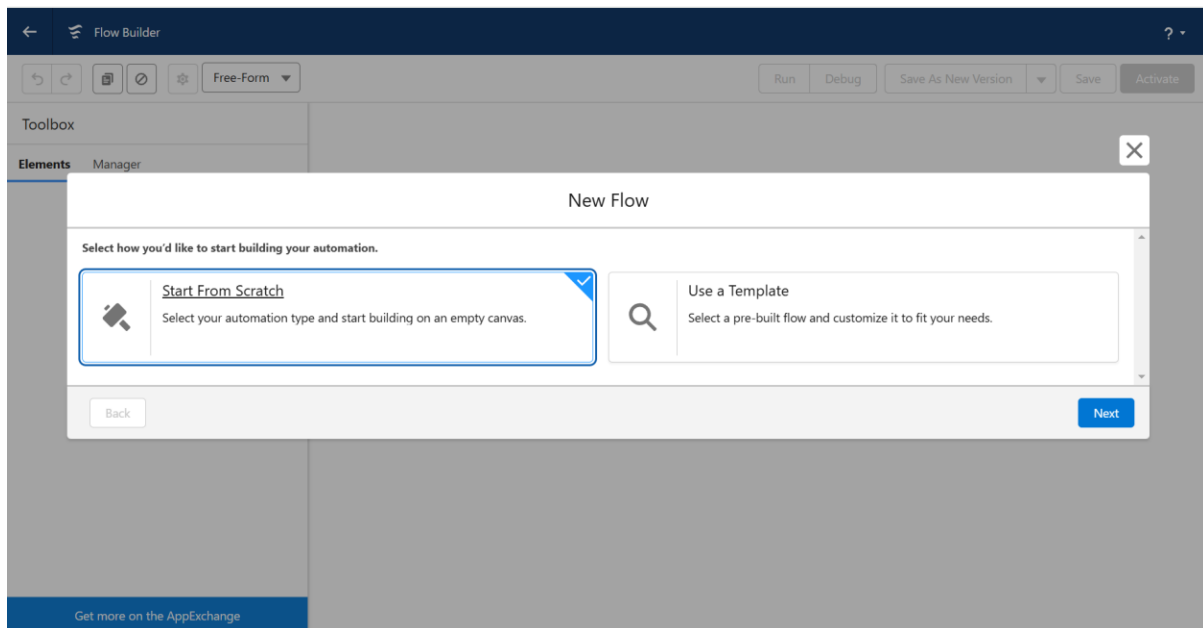
## 9. Test Your Automation:

- 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:



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Flow Builder

Select Elements

Auto-Layout

Run

Debug

View Tests

Save As New Version

Save

Activate

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 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)

Condition Requirements

All Conditions Are Met (AND)

Field

Status

Operator

Equals

Value

Qualified

+ Add Condition

Flow Builder

Select Elements

Auto-Layout

Run

Debug

View Tests

Save As New Version

Save

Activate

Record-Triggered Flow

Start

Run Immediately

Action

End

Send Email

\* Label

Enter a value.

\* API Name

Description

Send Email

emailSimple-emailSimple

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

Set Input Values for the Selected Action

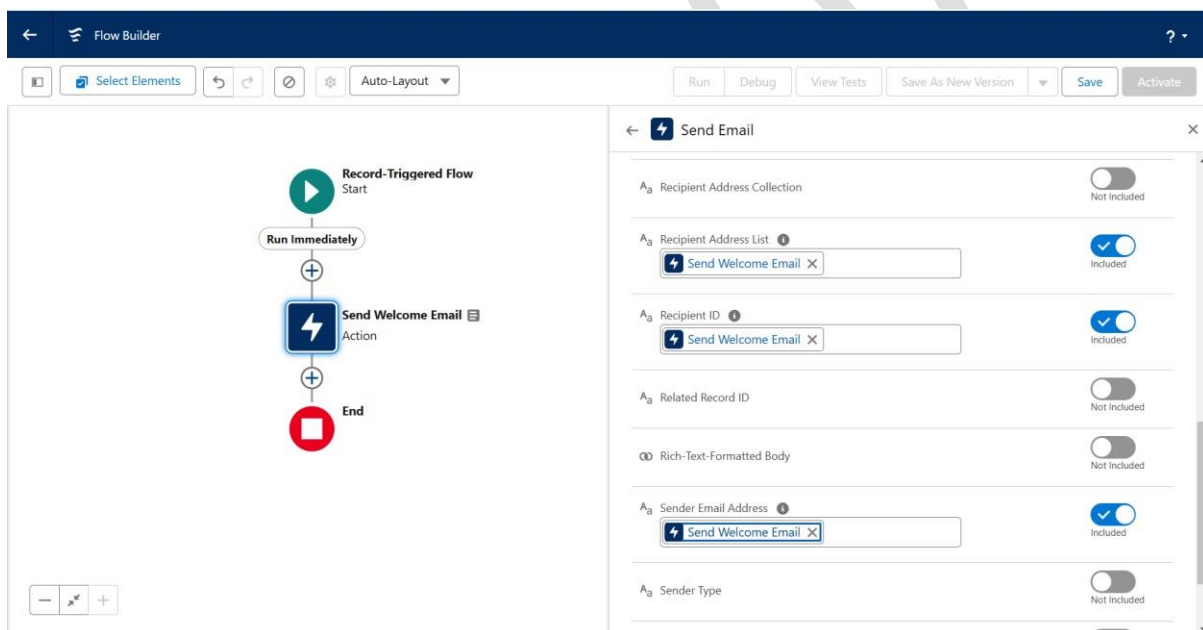
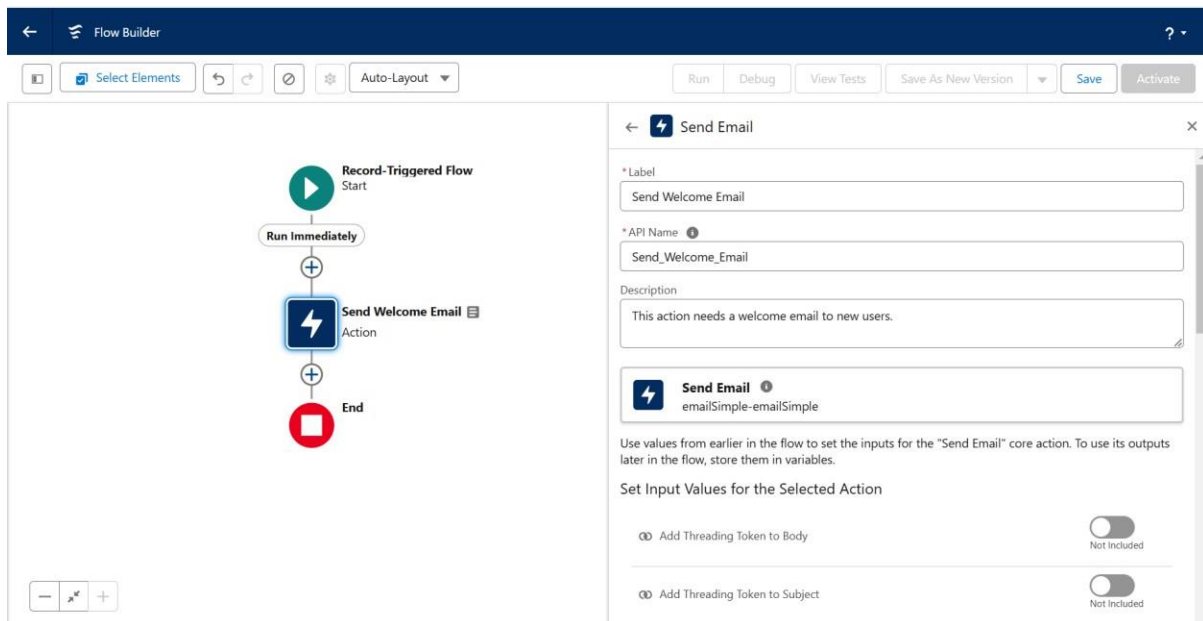
Add Threading Token to Body

Not Included

Add Threading Token to Subject

Not Included

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## RESULT:

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