

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").

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.

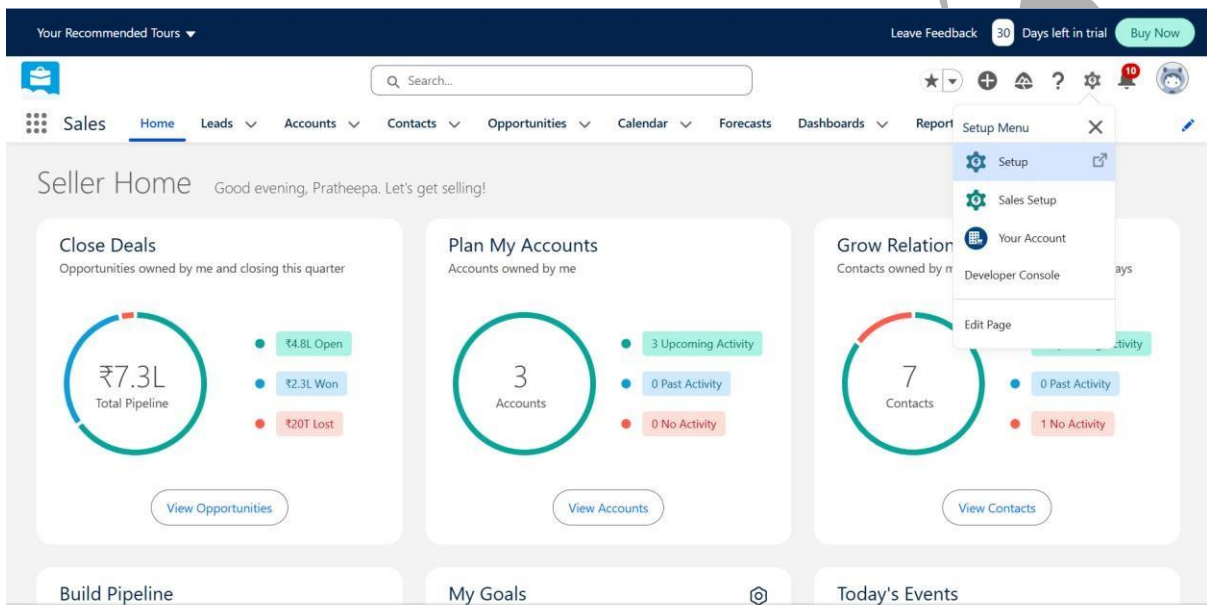
8. Activate and Save the Flow:

- 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:



Your Recommended Tours

Leave Feedback30 Days left in trialBuy Now

Search Setup

SetupHomeObject Manager

flow

Process Automation

Automation Home (Beta)

Flows

Migrate to Flow

Paused And Failed Flow Interviews

Process Builder

Workflow Actions

Email Alerts

Identity

Login Flows

Didn't find what you're looking for?
Try using Global Search.

SETUPHome

Create

Your Account

Manage your subscriptions in the Your Account app.

Let's GoWatch Video

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

1 items

NAME	TYPE	OBJECT
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Flow Builder

Free-Form

RunDebugSave As New VersionSaveActivate

Toolbox

ElementsManager

New Flow

Select how you'd like to start building your automation.

Start From Scratch

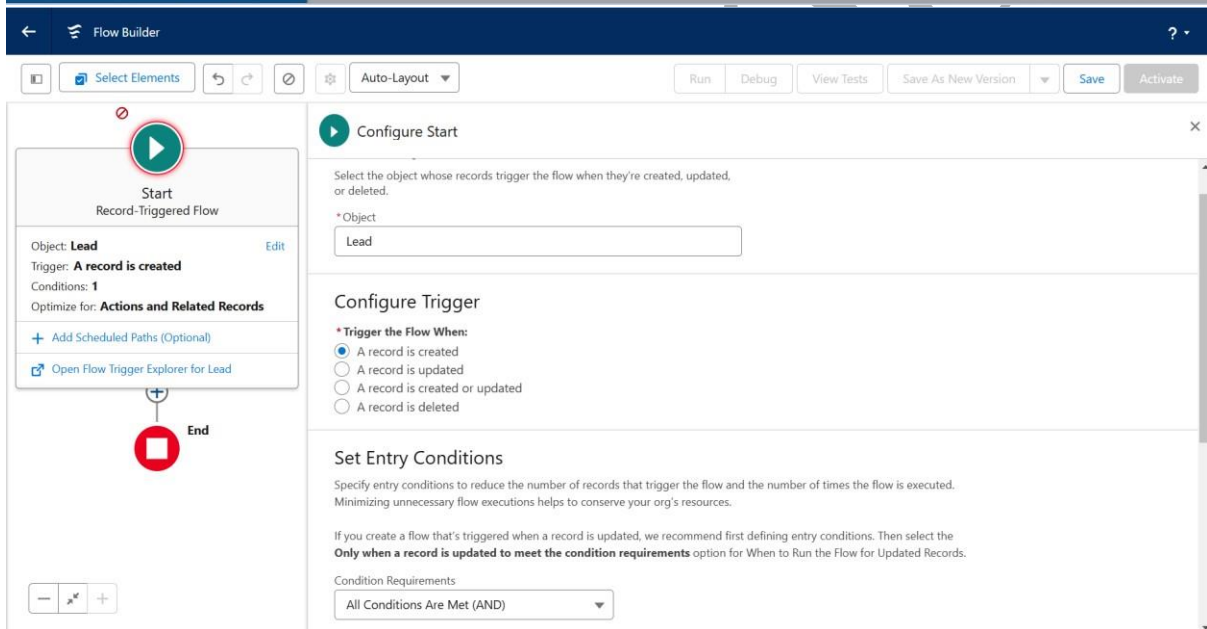
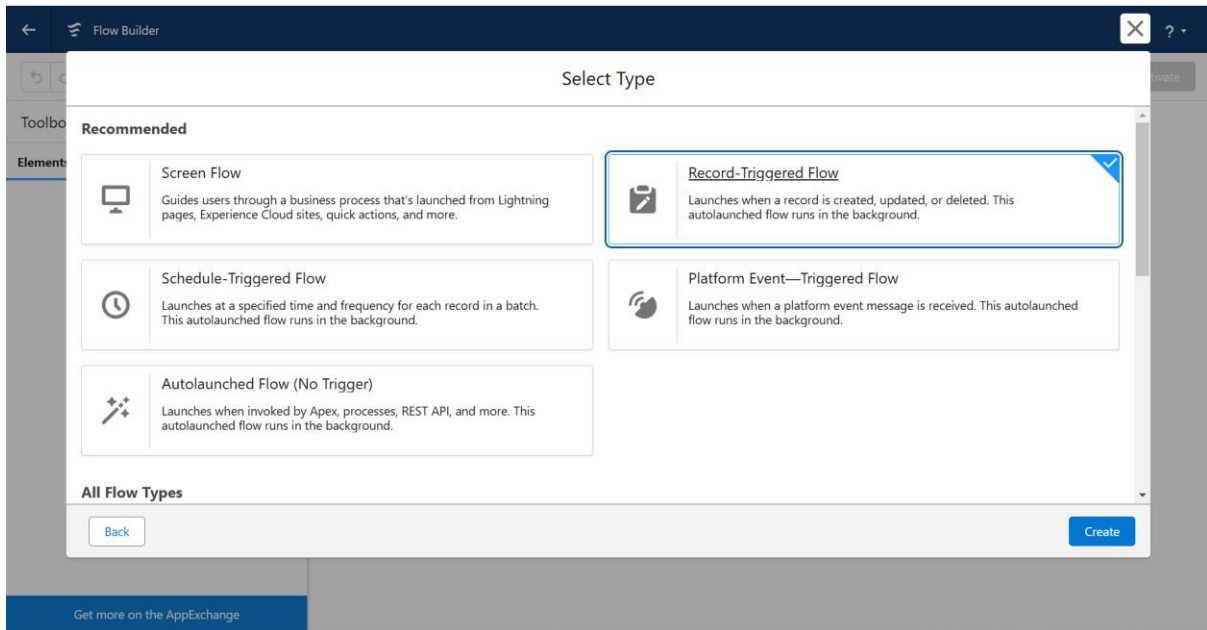
Select your automation type and start building on an empty canvas.

Use a Template

Select a pre-built flow and customize it to fit your needs.

BackNext

Get more on the AppExchange



Condition Requirements

All Conditions Are Met (AND)

Field

Status

Operator

Equals

Value

Qualified

+ Add Condition

Flow Builder

Run Debug View Tests Save As New Version Save Activate

Select Elements Undo Redo Auto-Layout

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

Flow Builder

Run Debug View Tests Save As New Version Save Activate

Select Elements Undo Redo Auto-Layout

Record-Triggered Flow Start

Run Immediately

Send Welcome Email Action

End

Send Email

*Label

Send Welcome Email

*API Name

Send_Welcome_Email

Description

This action needs a welcome email to new users.

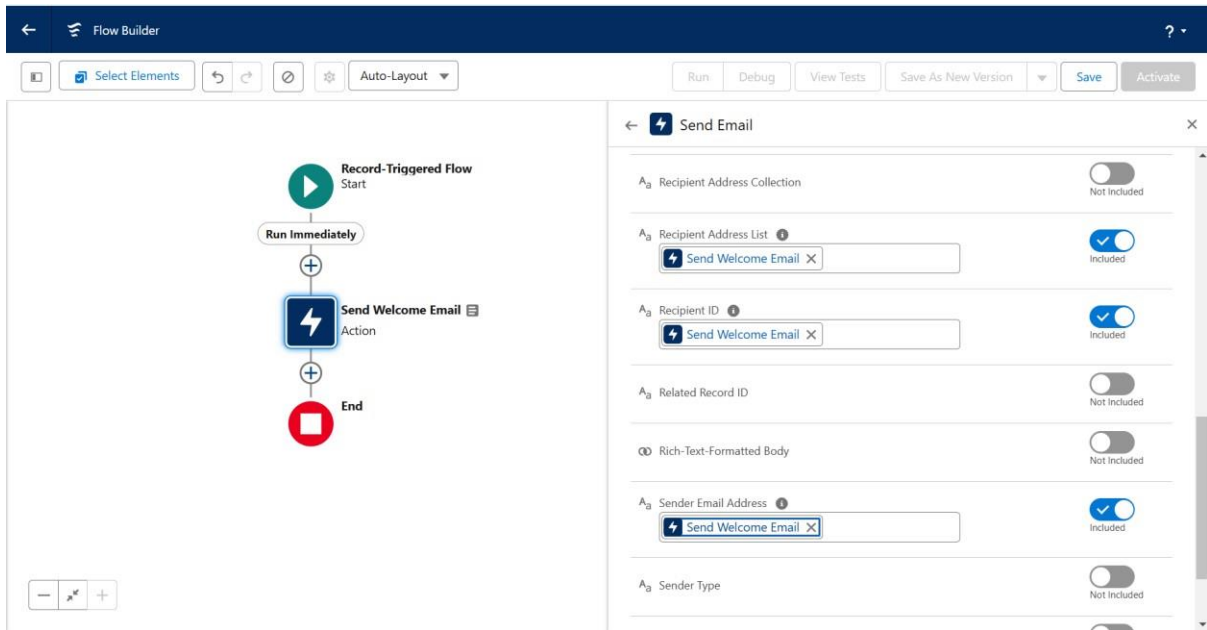
Send Email emailSimple-emailSimple

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



RESULT:

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