

Ex no: 7

DEVELOP A SIMPLE EMAIL AUTOMATION SERVICE USING SALESFORCE

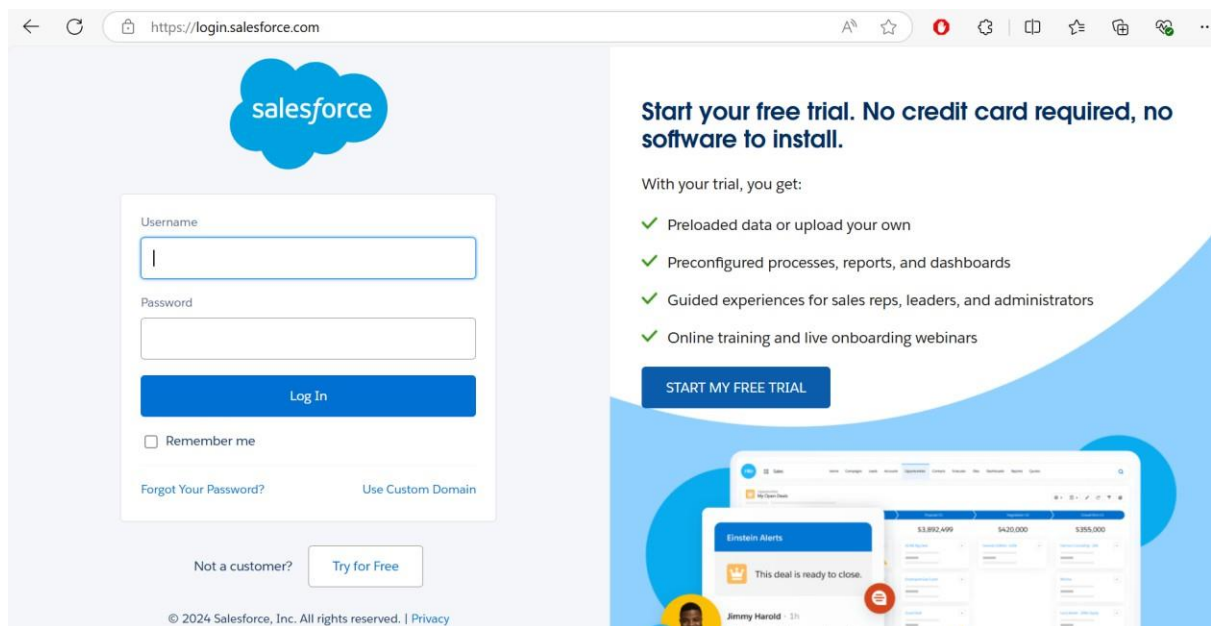
Aim:

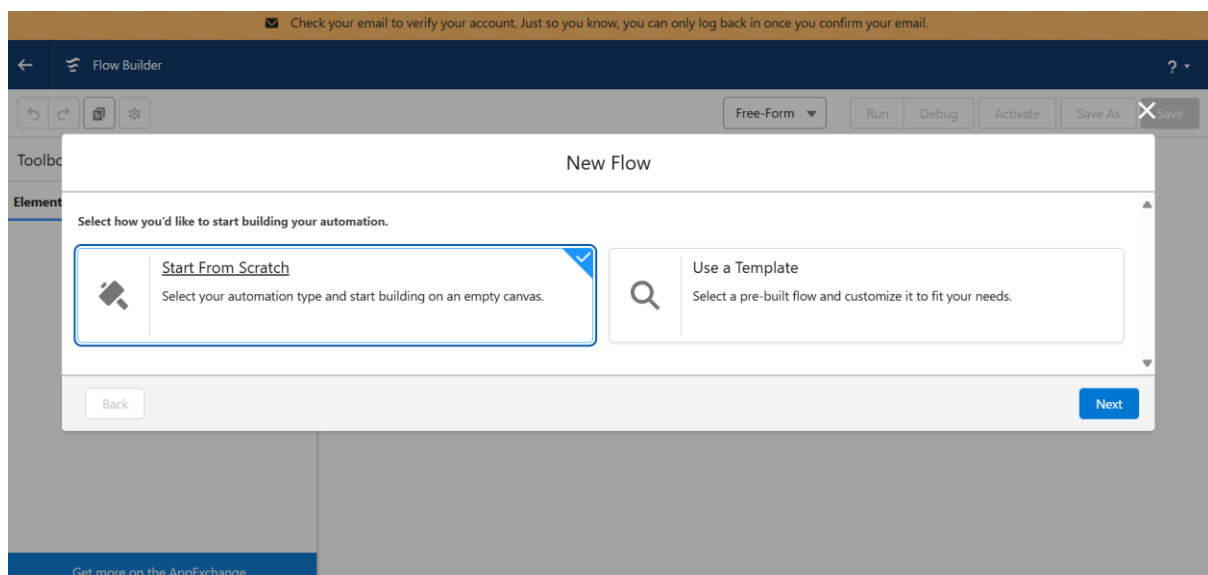
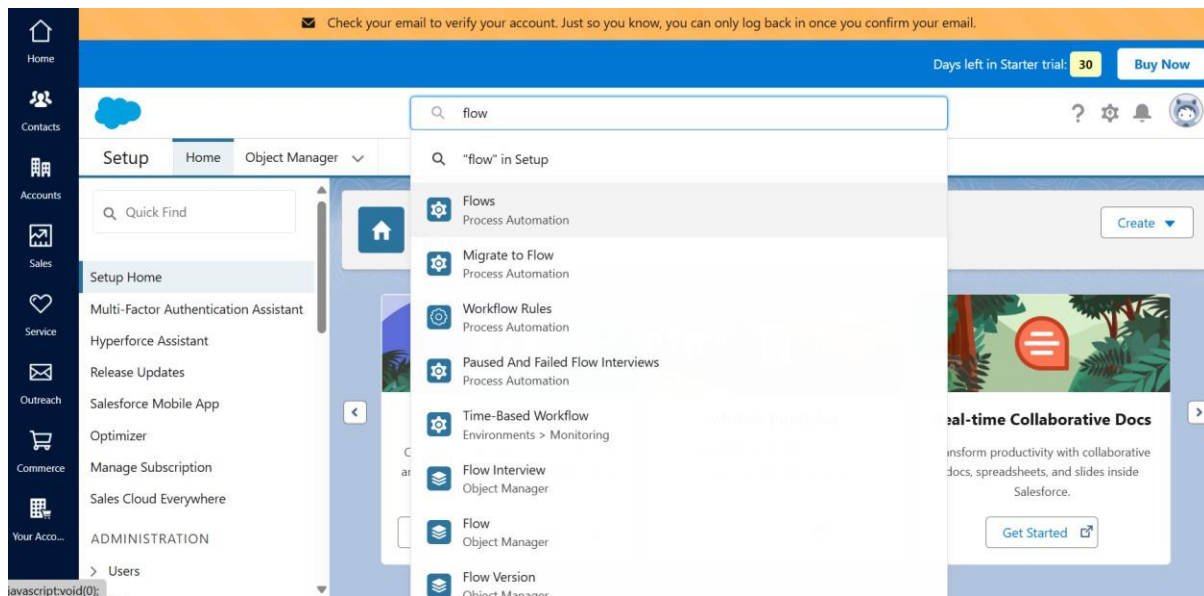
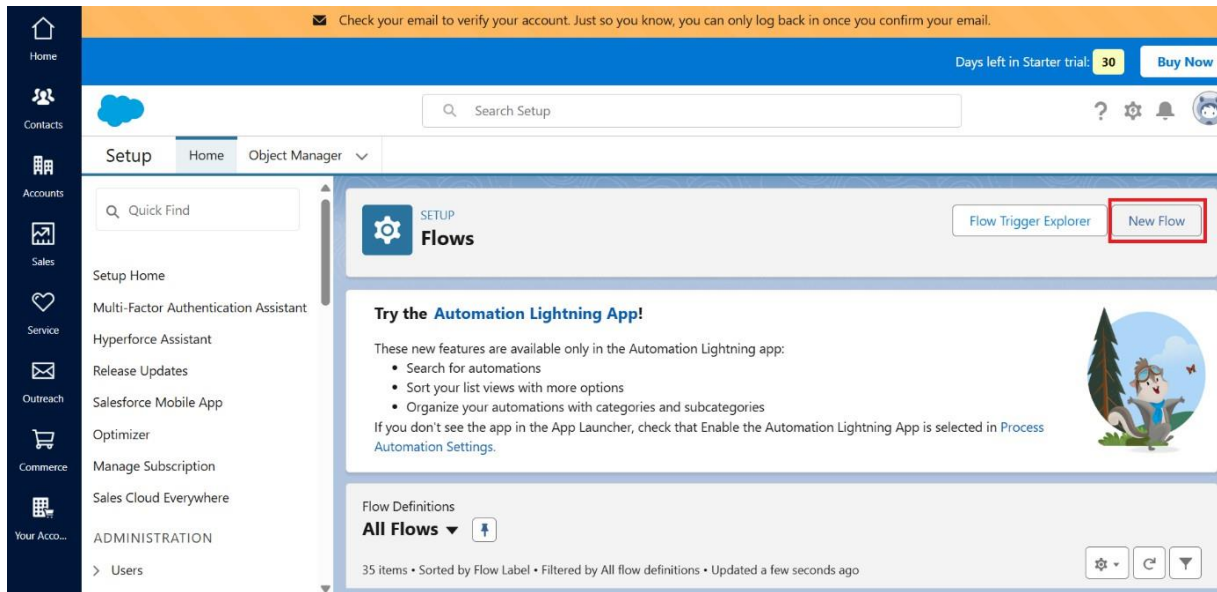
To develop a simple email automation service using salesforce.

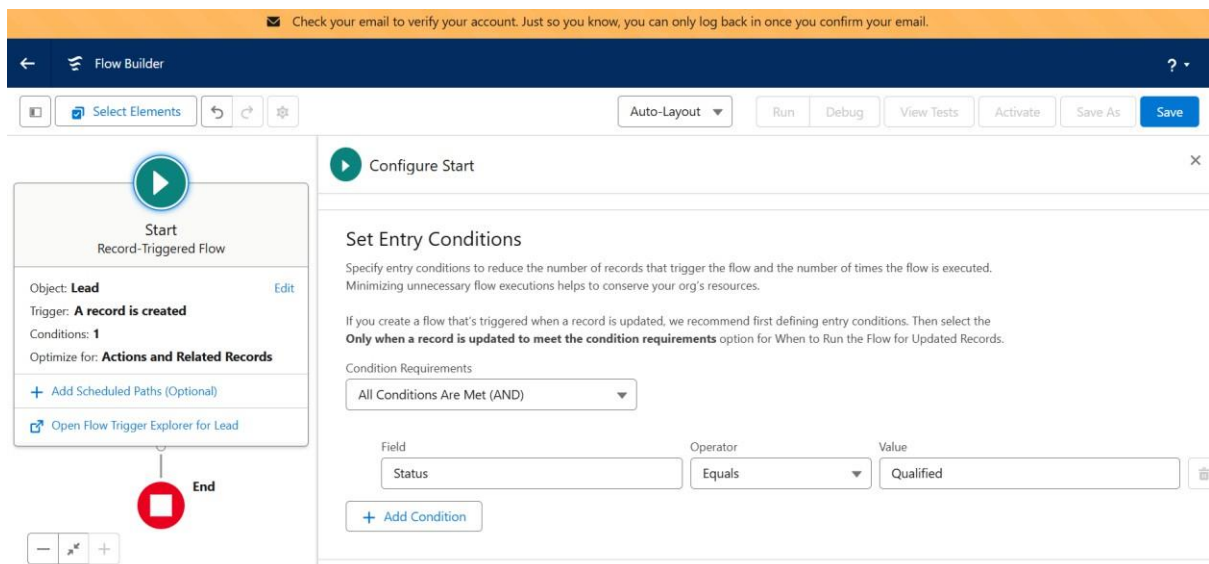
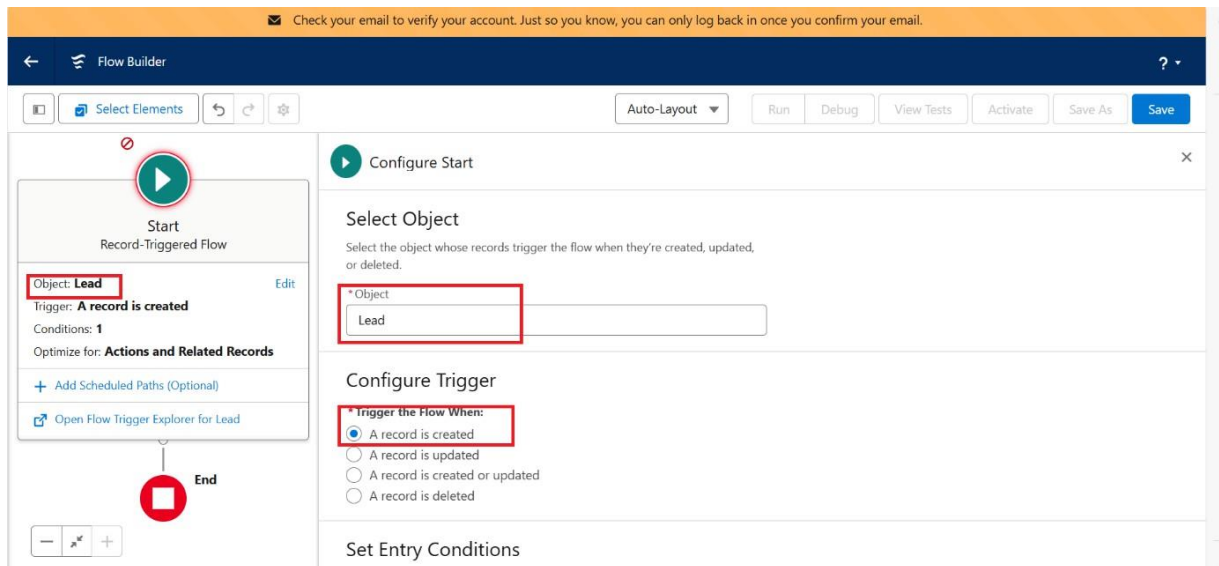
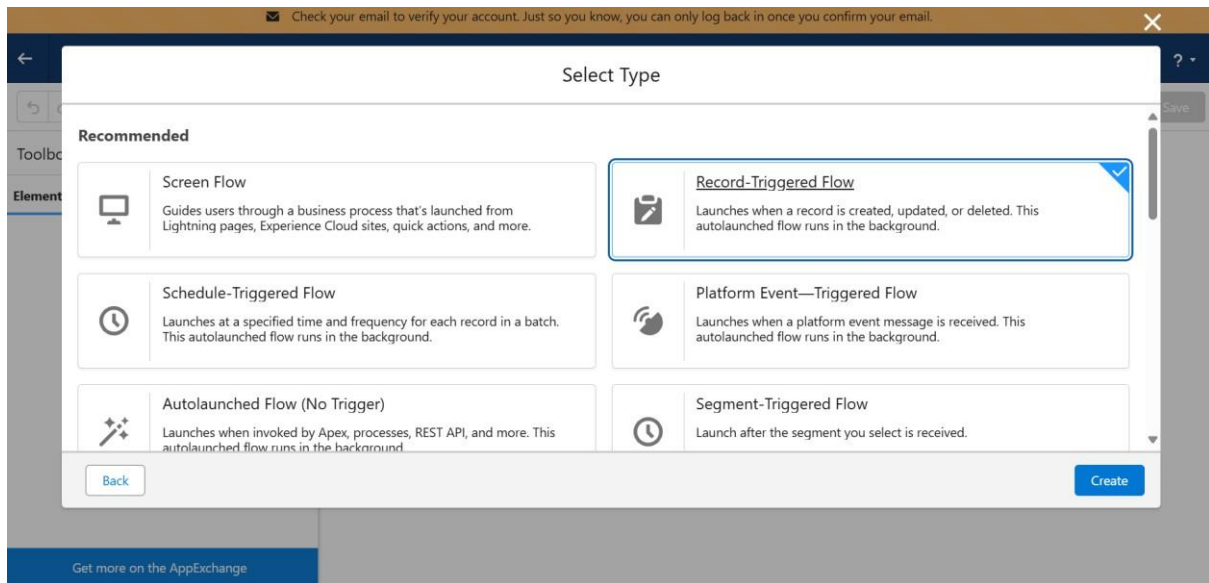
Procedure:

1. Create a Salesforce account.
2. Click on the settings icon on the top right corner of the home page and open the advanced setup page.
3. Search for flow in the search bar and click on Flows in Process Automation.
4. Create a new flow and select the flow type as Record-Triggered Flow to start an automation when a record is created or triggered.
5. Select the Object you want to trigger the flow (example: Lead).
6. Configure the trigger so that the flow will start when a record is created.
7. Now set the condition that triggers the email i.e when the lead's status is set to "Qualified".
8. In the flow builder click on + to add an element and select Action from the interaction menu.
9. In the Action type search for send email and you need to configure the recipient address list, recipient email id and the sender's email address.
10. Save and activate the flow.

Output:







*Optimize the Flow for:

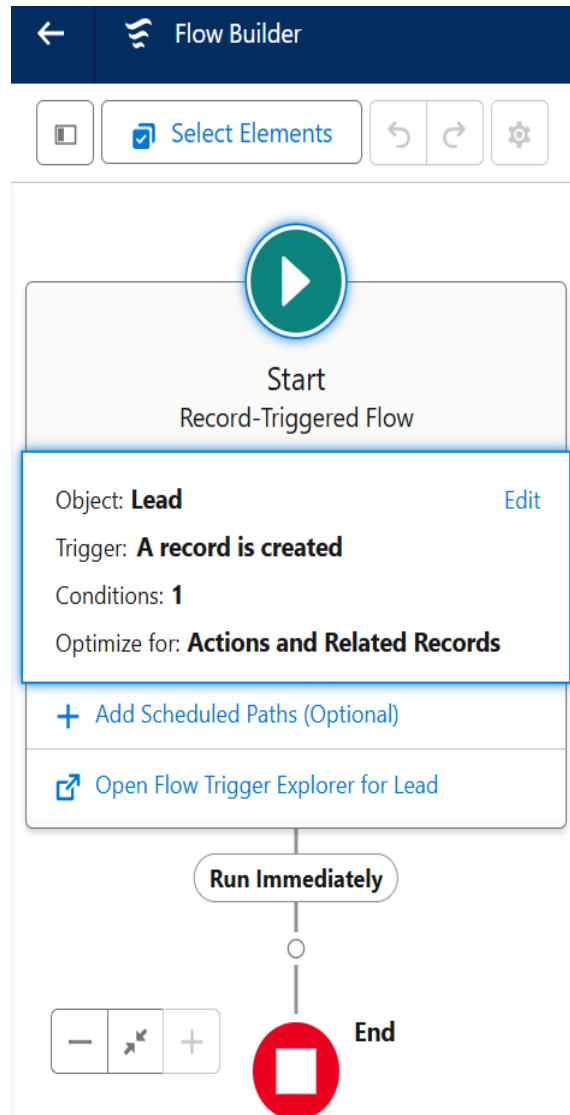
Fast Field Updates

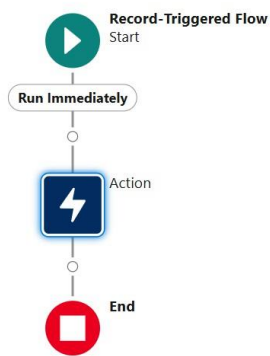
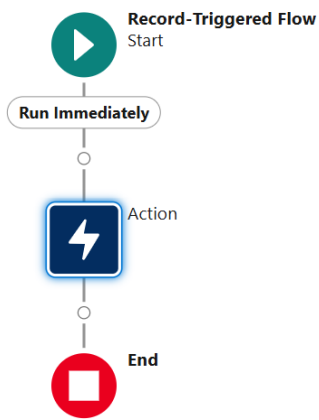
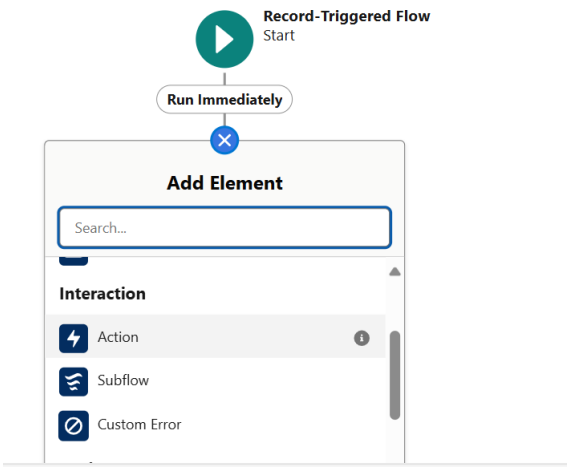
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

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





Action ×

Search Actions

Actions

Send Email
emailSimple-emailSimple

Check your email to verify your account. Just so you know, you can only log back in once you confirm your email.

Flow Builder

Select Elements | Auto-Layout | Run | Debug | View Tests | Activate | Save As | Save

Record-Triggered Flow Start

Run Immediately

Welcome Email Action

End

Send Email

Recipient Address List: Welcome Email (Included)

Recipient ID: Welcome Email (Included)

Related Record ID: Not Included

Rich-Text-Formatted Body: Not Included

Sender Email Address: Welcome Email (Included)

Result:

Thus the development of a simple email automation service using salesforce has been executed successfully.