Exp No: 7 **210701109**

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:
  - **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. (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:
  - **Object**: The same object as in the Flow (e.g., Lead).
  - **Email Template**: Choose a predefined template or create a new one.
  - **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.

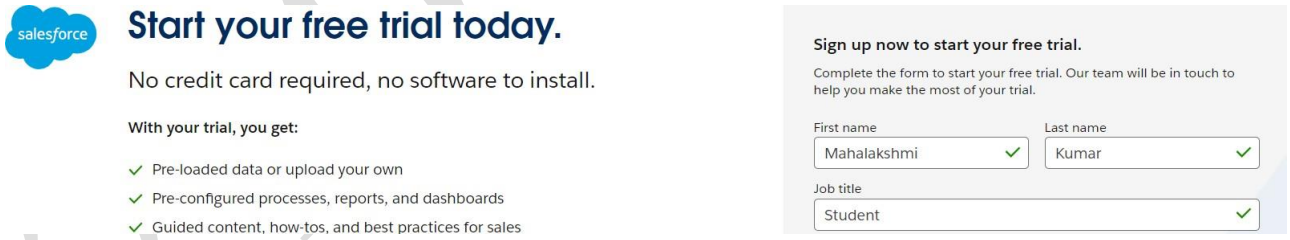
8. Activate and Save the Flow:

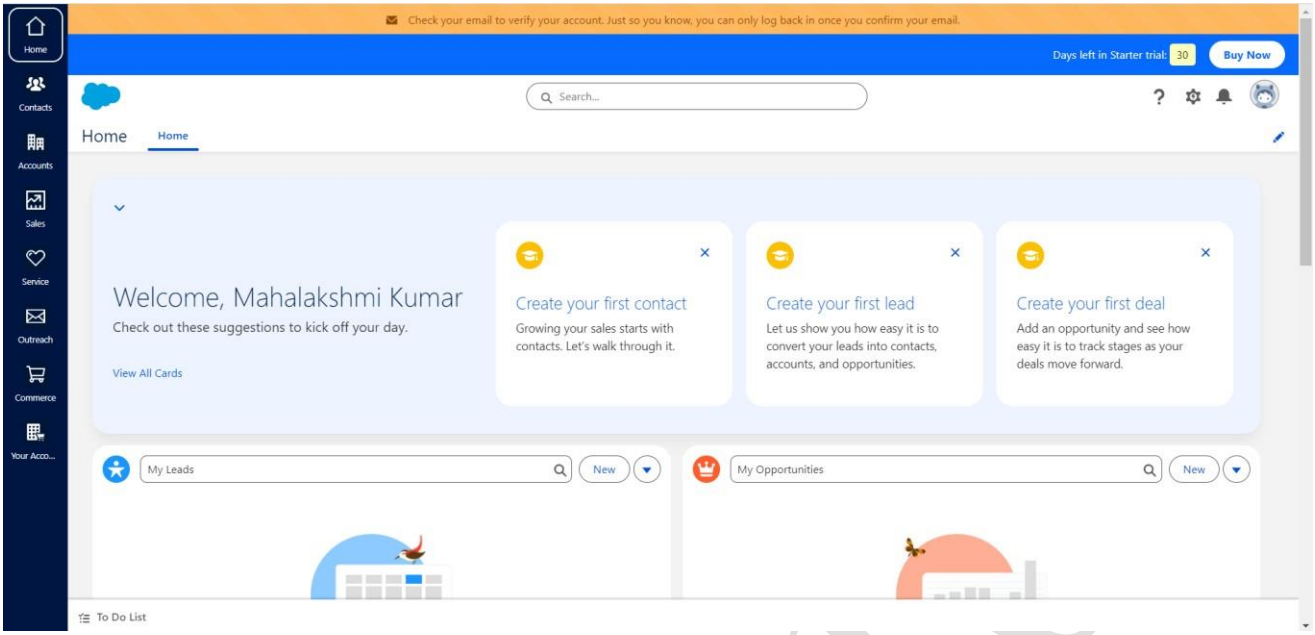
- Once you've configured the email sending action, click **Save**.
- Click **Activate** to make the flow live.

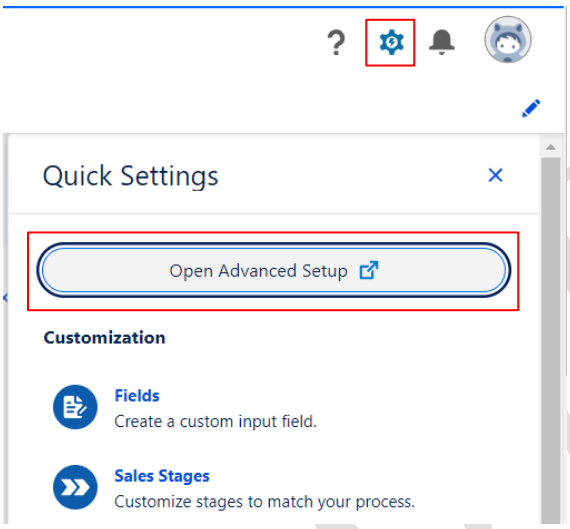
9. Test Your Automation:

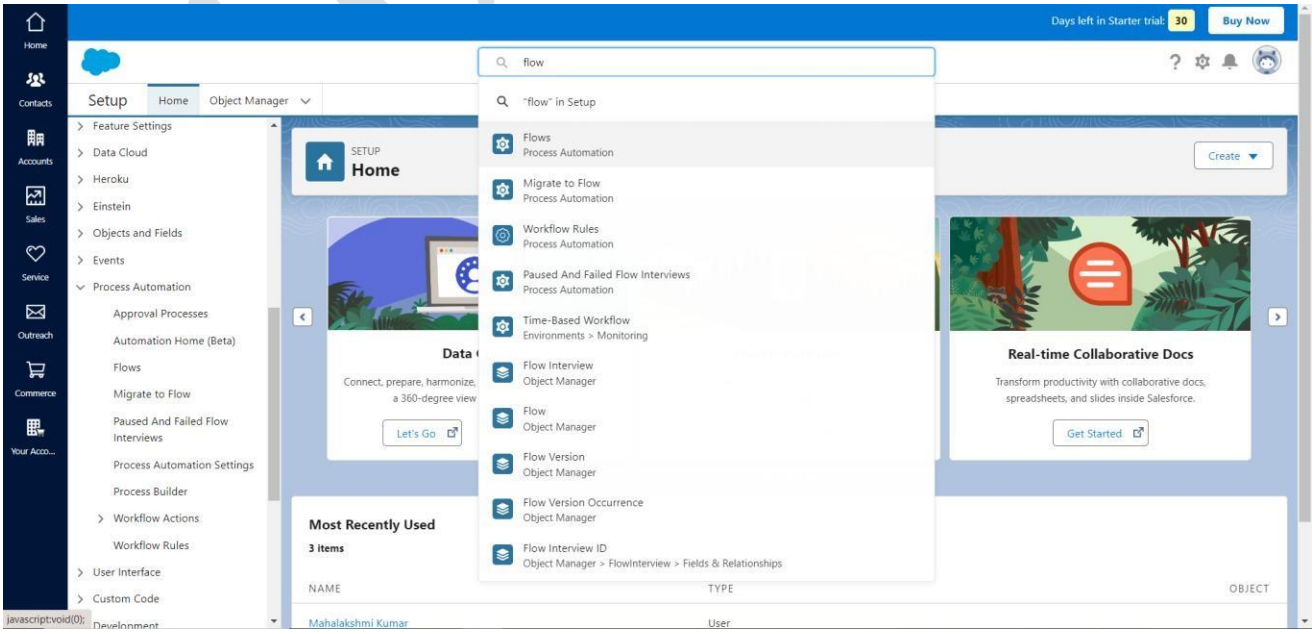
- To ensure your automation works, create a new lead or update an existing record based on the criteria you've set in the flow.
- Check the recipient's inbox to confirm the email is sent.

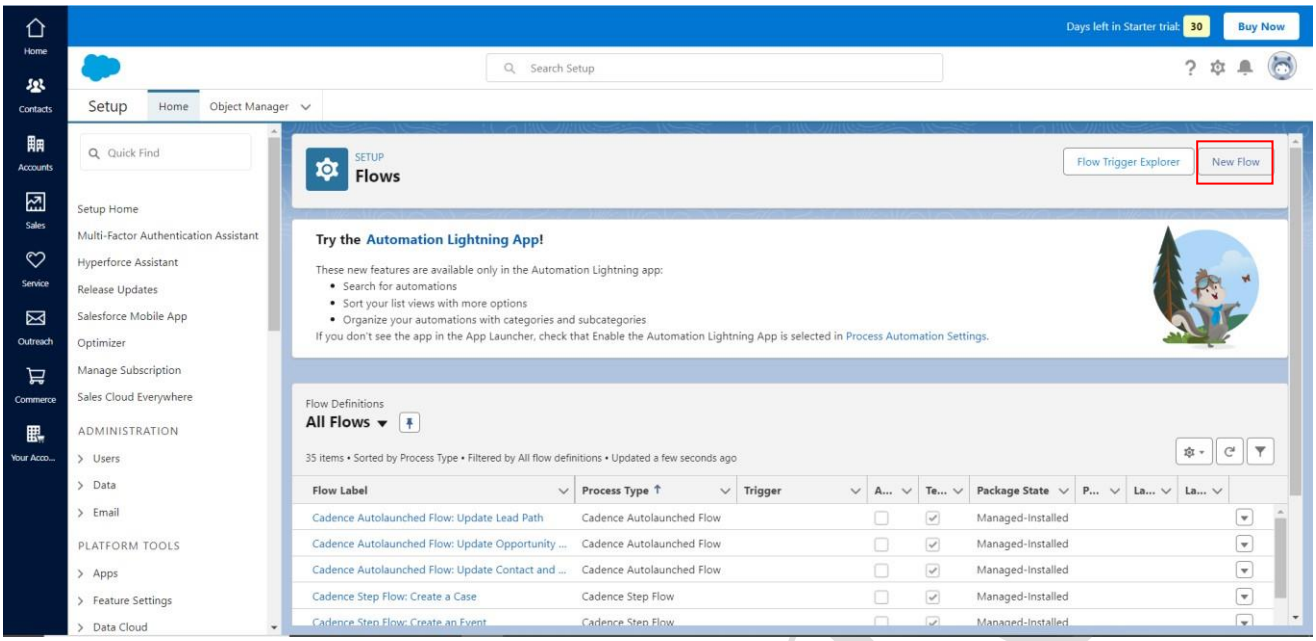
OUTPUT:

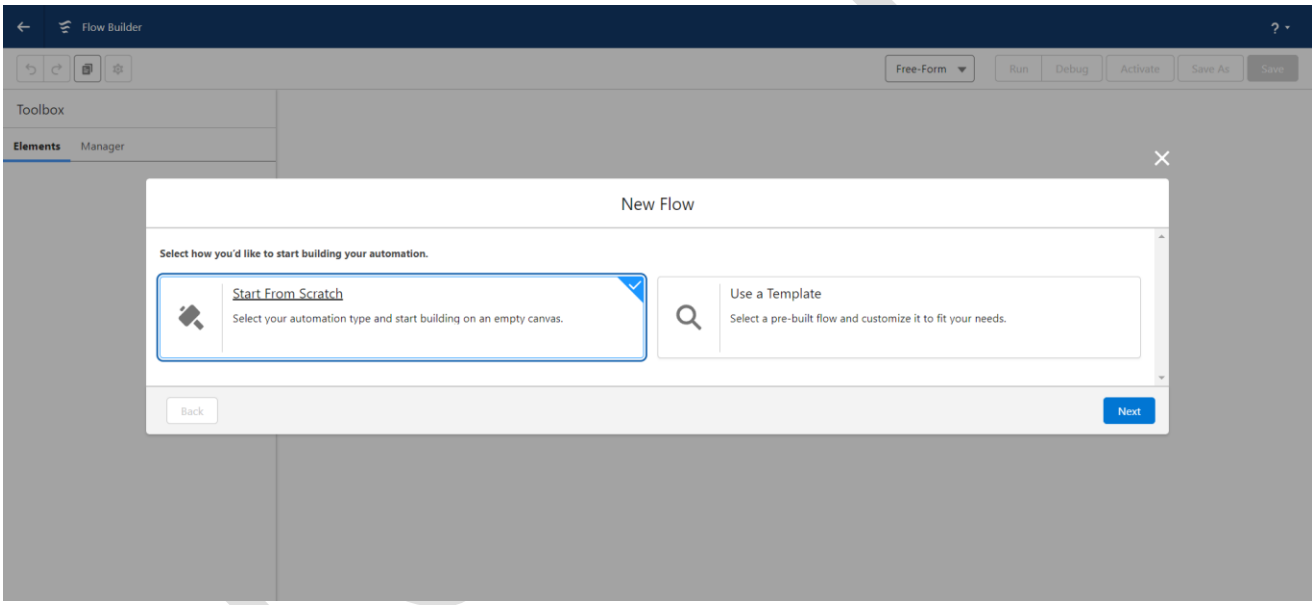


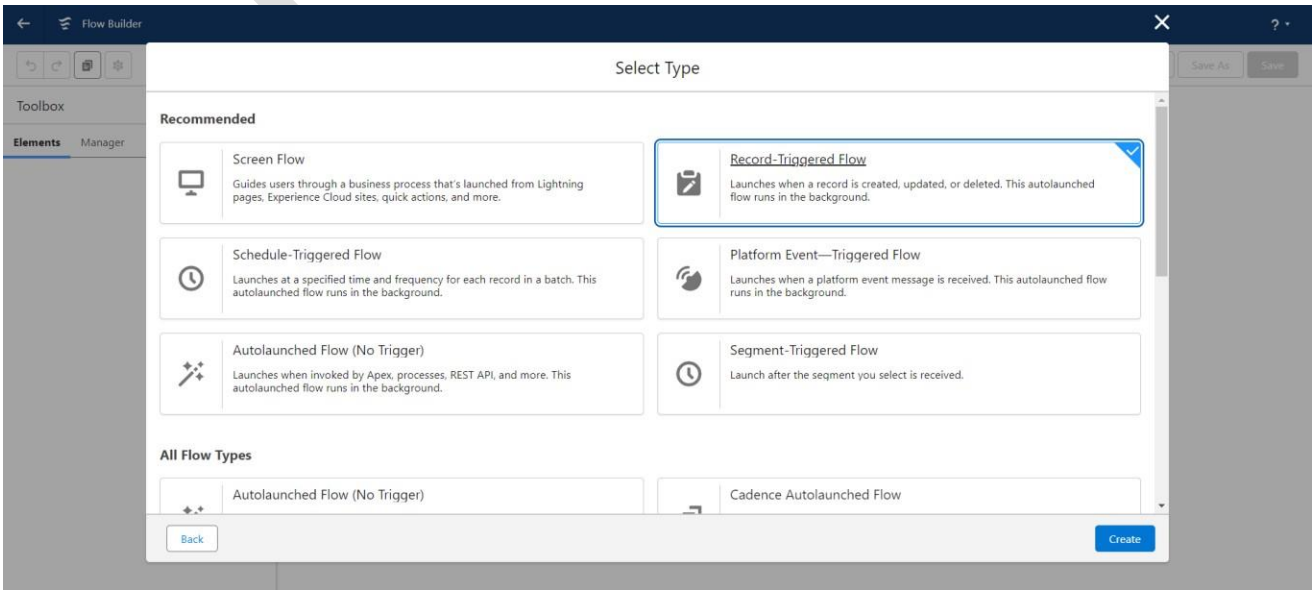

Check your email to verify your account. Just so you know, you can only log back in once you confirm your email.
Days left in Starter trial: 30
Buy Now
Search...
Home
Home
Welcome, Mahalakshmi Kumar
Check out these suggestions to kick off your day.
View All Cards
Create your first contact
Growing your sales starts with contacts. Let's walk through it.
Create your first lead
Let us show you how easy it is to convert your leads into contacts, accounts, and opportunities.
Create your first deal
Add an opportunity and see how easy it is to track stages as your deals move forward.
My Leads
New
My Opportunities
New
To Do List

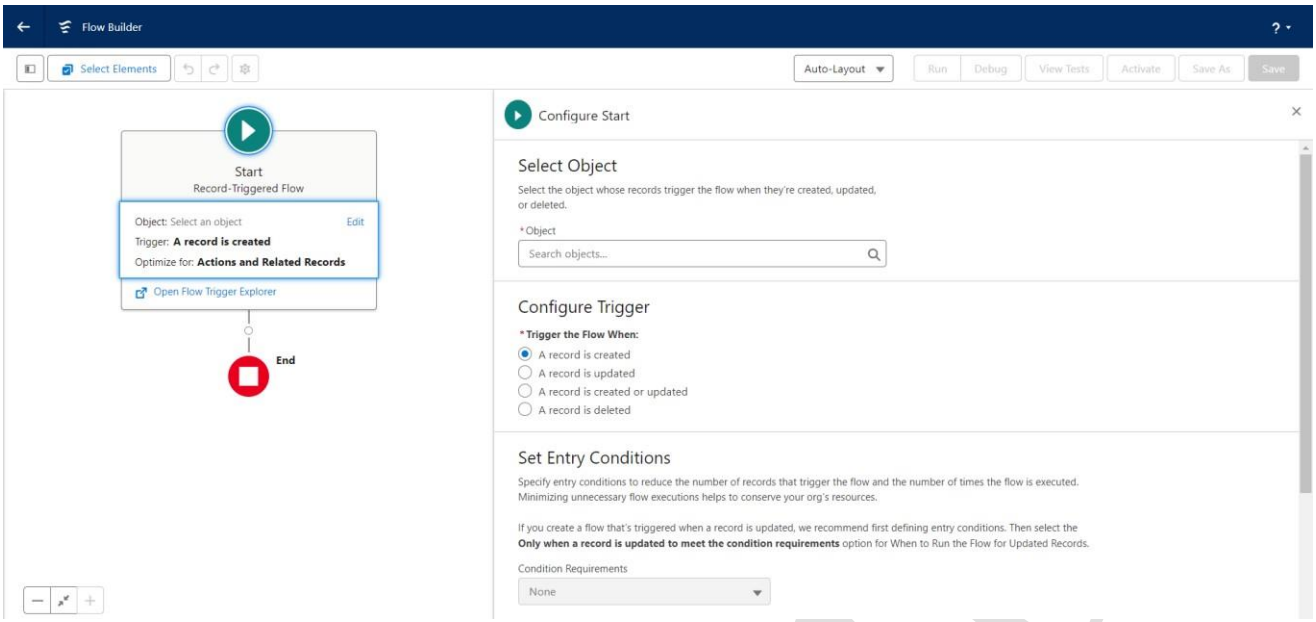

Quick Settings
Open Advanced Setup
Customization
Fields
Create a custom input field.
Sales Stages
Customize stages to match your process.

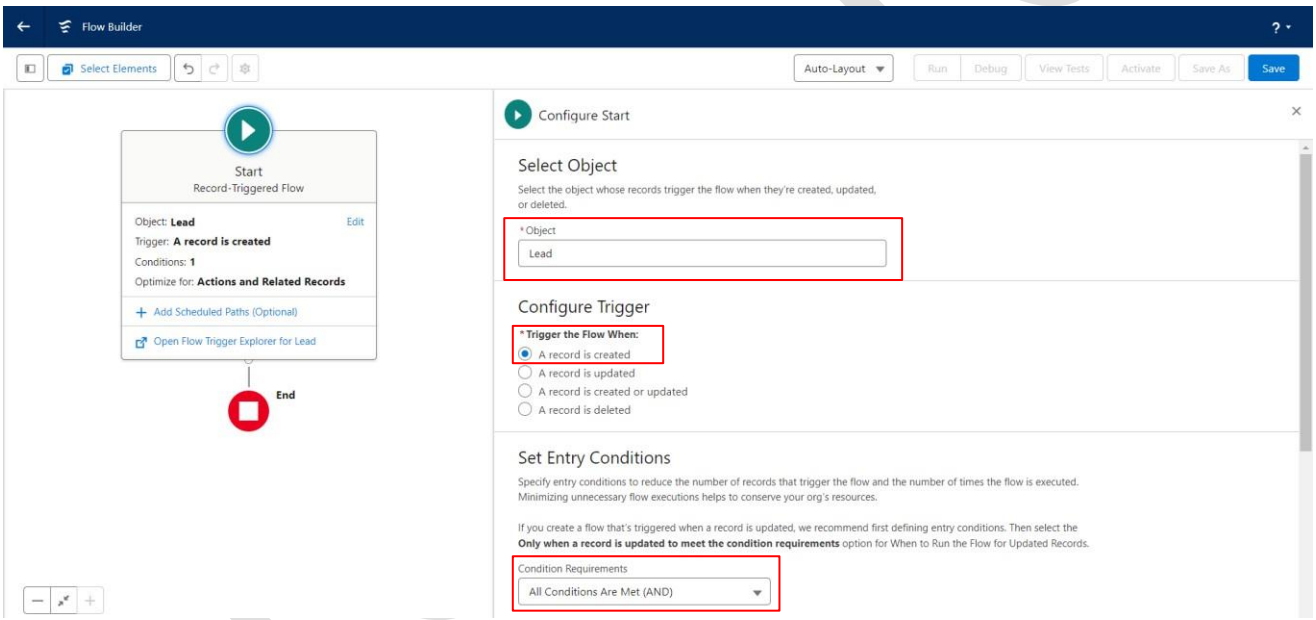

Days left in Starter trial: 30
Buy Now
flow
Setup
Home
Object Manager
"flow" in Setup
Flows
Process Automation
Migrate to Flow
Process Automation
Workflow Rules
Process Automation
Paused And Failed Flow Interviews
Process Automation
Time-Based Workflow
Environments > Monitoring
Flow Interview
Object Manager
Flow
Object Manager
Flow Version
Object Manager
Flow Version Occurrence
Object Manager
Flow Interview ID
Object Manager > FlowInterview > Fields & Relationships
Feature Settings
Data Cloud
Heroku
Einstein
Objects and Fields
Events
Process Automation
Approval Processes
Automation Home (Beta)
Flows
Migrate to Flow
Paused And Failed Flow Interviews
Process Automation Settings
Process Builder
Workflow Actions
Workflow Rules
User Interface
Custom Code
SETUP
Home
Create
Real-time Collaborative Docs
Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started
Most Recently Used
3 items
NAME
TYPE
OBJECT
Mahalakshmi Kumar
User

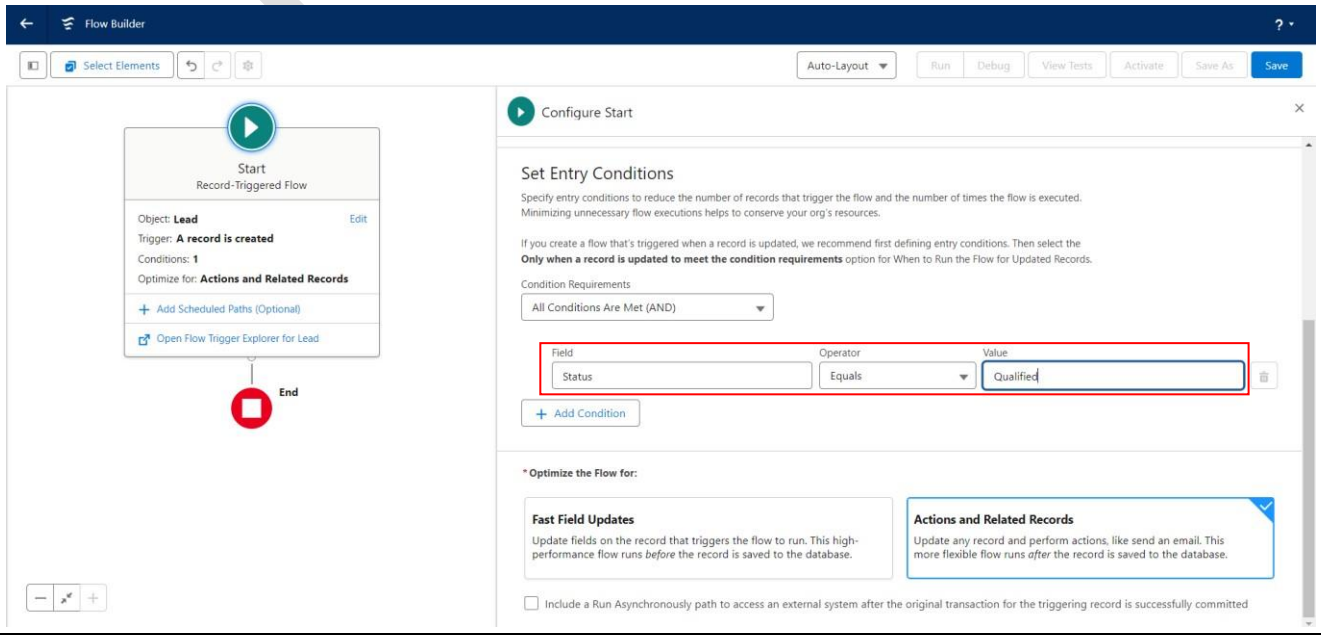

Days left in Starter trial: 30
Buy Now
Search Setup
Setup
Home
Object Manager
Quick Find
Setup Home
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Optimizer
Manage Subscription
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Apps
Feature Settings
Data Cloud
SETUP
Flows
Flow Trigger Explorer
New Flow
Try the Automation Lightning App!
These new features are available only in the Automation Lightning app:
Search for automations
Sort your list views with more options
Organize your automations with categories and subcategories
If you don't see the app in the App Launcher, check that Enable the Automation Lightning App is selected in Process Automation Settings.
Flow Definitions
All Flows
35 items • Sorted by Process Type • Filtered by All flow definitions • Updated a few seconds ago
Flow Label
Process Type
Trigger
Package State
Cadence Autolaunched Flow: Update Lead Path
Cadence Autolaunched Flow: Update Opportunity ...
Cadence Autolaunched Flow: Update Contact and ...
Cadence Step Flow: Create a Case
Cadence Autolaunched Flow
Cadence Step Flow
Managed-Installed

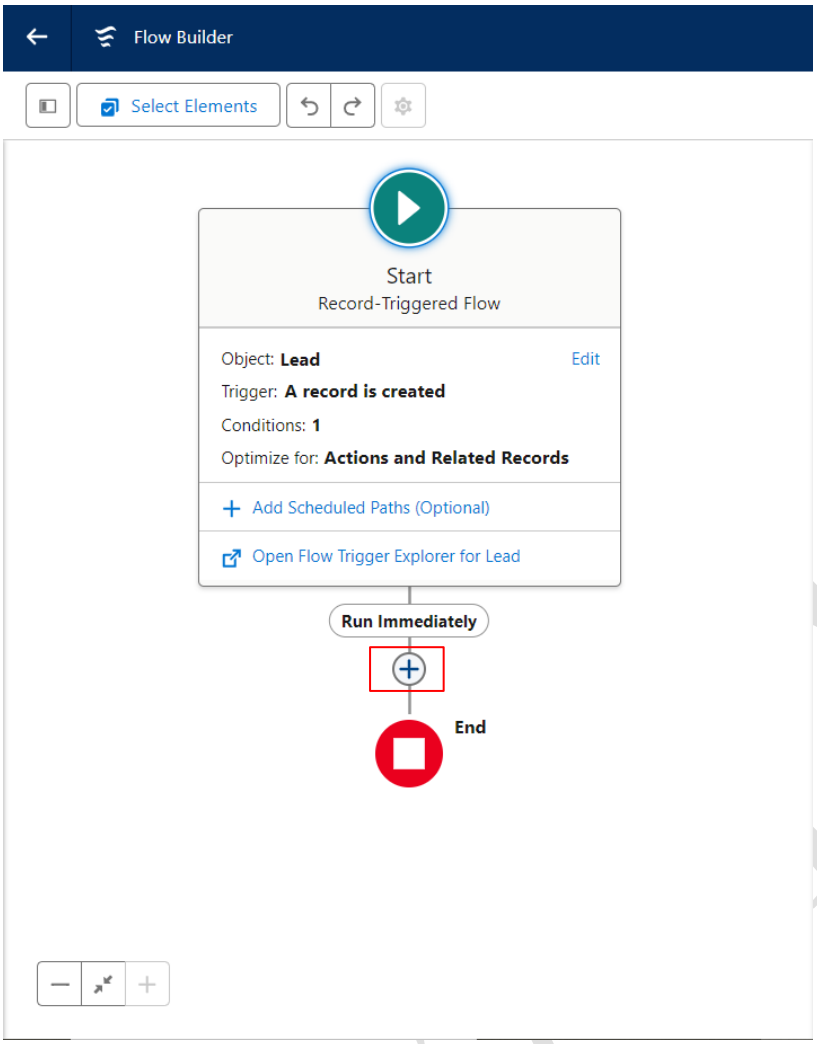

Flow Builder
Free-Form
Run
Debug
Activate
Save As
Save
Toolbox
Elements
Manager
New Flow
Select how you'd like to start building your automation.
Start From Scratch
Select your automation type and start building on an empty canvas.
Use a Template
Select a pre-built flow and customize it to fit your needs.
Back
Next

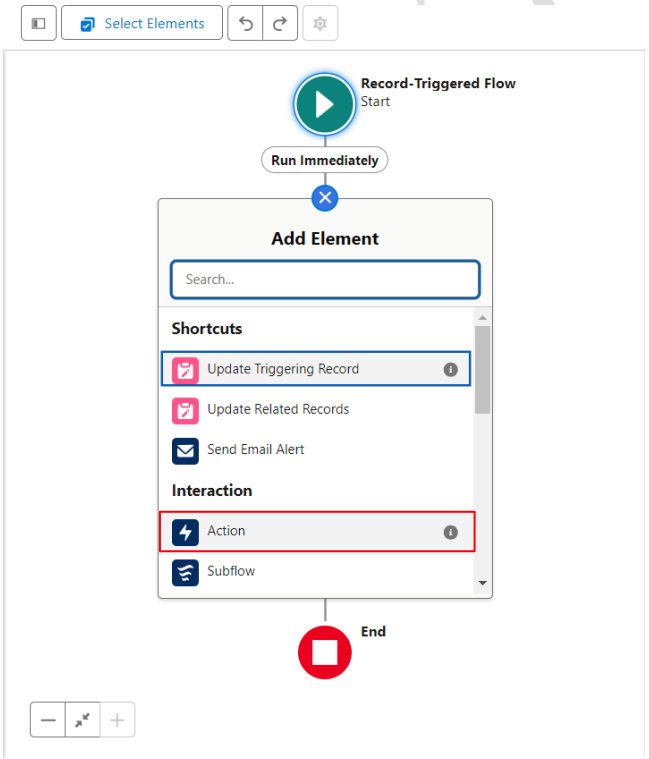

Flow Builder
Toolbox
Elements
Manager
Select Type
Recommended
Screen Flow
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
Record-Triggered Flow
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
Platform Event—Triggered Flow
Launches when a platform event message is received. This autolaunched flow runs in the background.
Autolaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.
Segment-Triggered Flow
Launch after the segment you select is received.
All Flow Types
Autolaunched Flow (No Trigger)
Cadence Autolaunched Flow
Back
Create

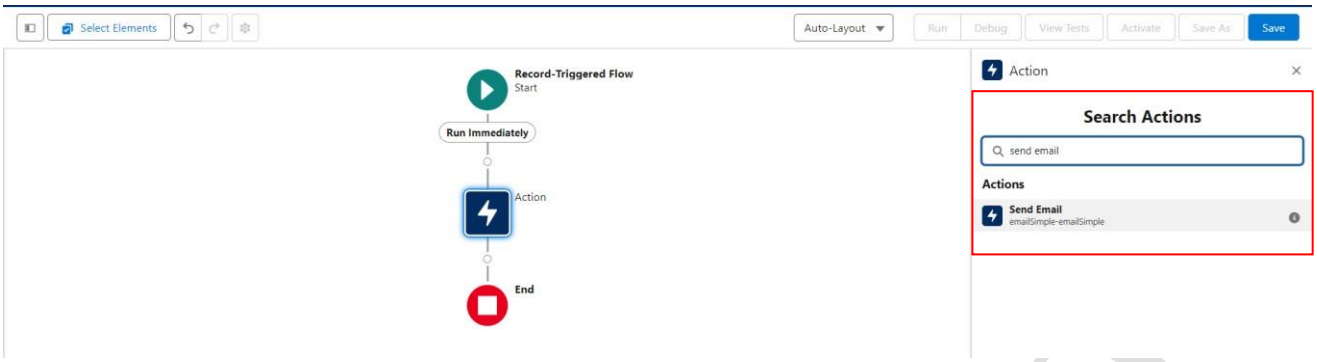

Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Activate
Save As
Save
Start
Record-Triggered Flow
Object: Select an object
Edit
Trigger: A record is created
Optimize for: Actions and Related Records
Open Flow Trigger Explorer
End
Configure Start
Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
* Object
Search objects...
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
None

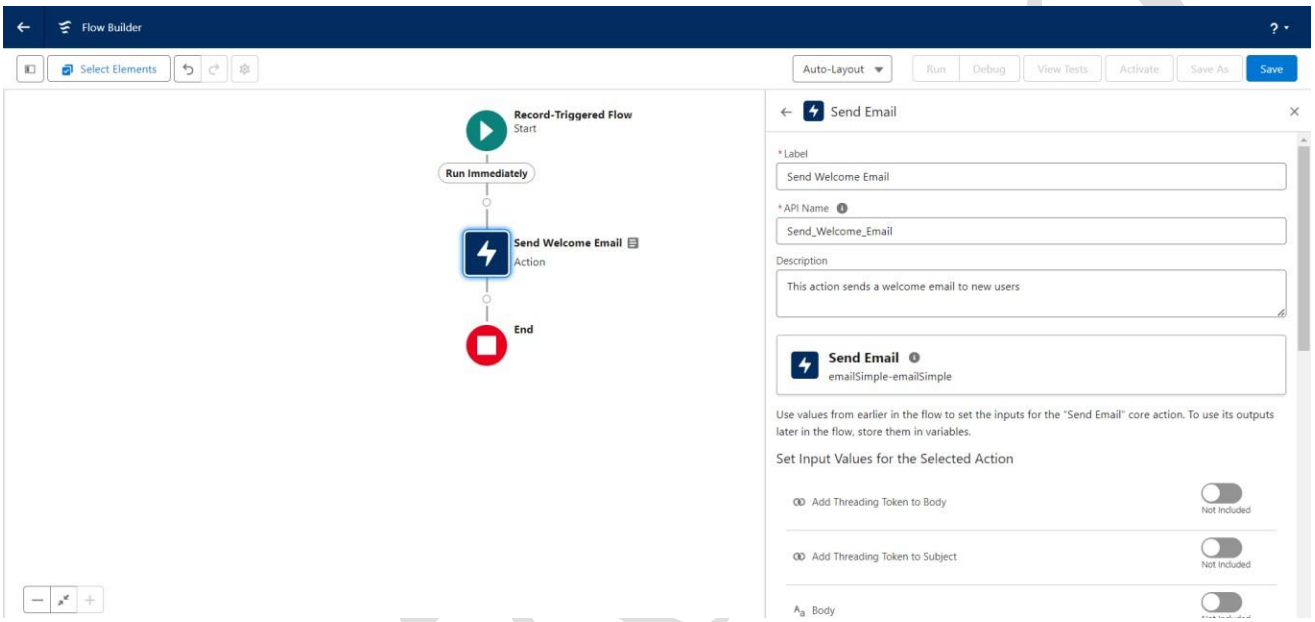

Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Activate
Save As
Save
Start
Record-Triggered Flow
Object: Lead
Edit
Trigger: A record is created
Conditions: 1
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Lead
End
Configure Start
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)

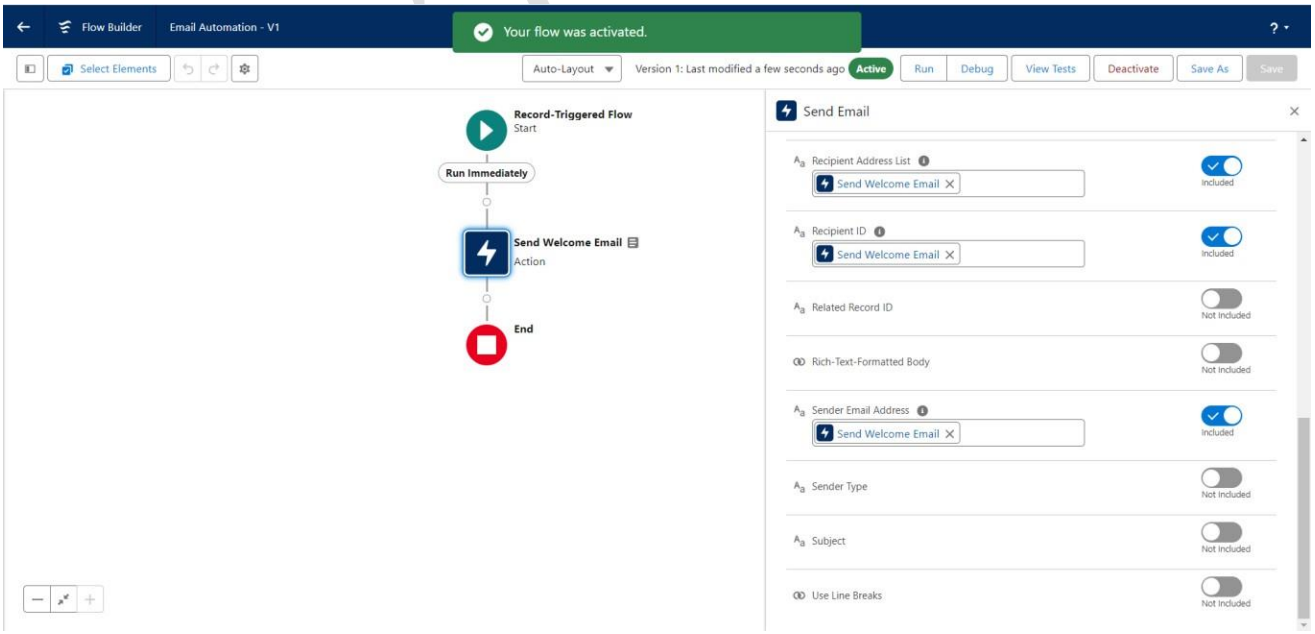

Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Activate
Save As
Save
Start
Record-Triggered Flow
Object: Lead
Edit
Trigger: A record is created
Conditions: 1
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Lead
End
Configure Start
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
Operator
Value
Status
Equals
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


Flow Builder
Select Elements
Start
Record-Triggered Flow
Object: Lead
Edit
Trigger: A record is created
Conditions: 1
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Lead
Run Immediately
End


Select Elements
Record-Triggered Flow
Start
Run Immediately
Add Element
Search...
Shortcuts
Update Triggering Record
Update Related Records
Send Email Alert
Interaction
Action
Subflow
End







RESULT:

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