

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. (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.

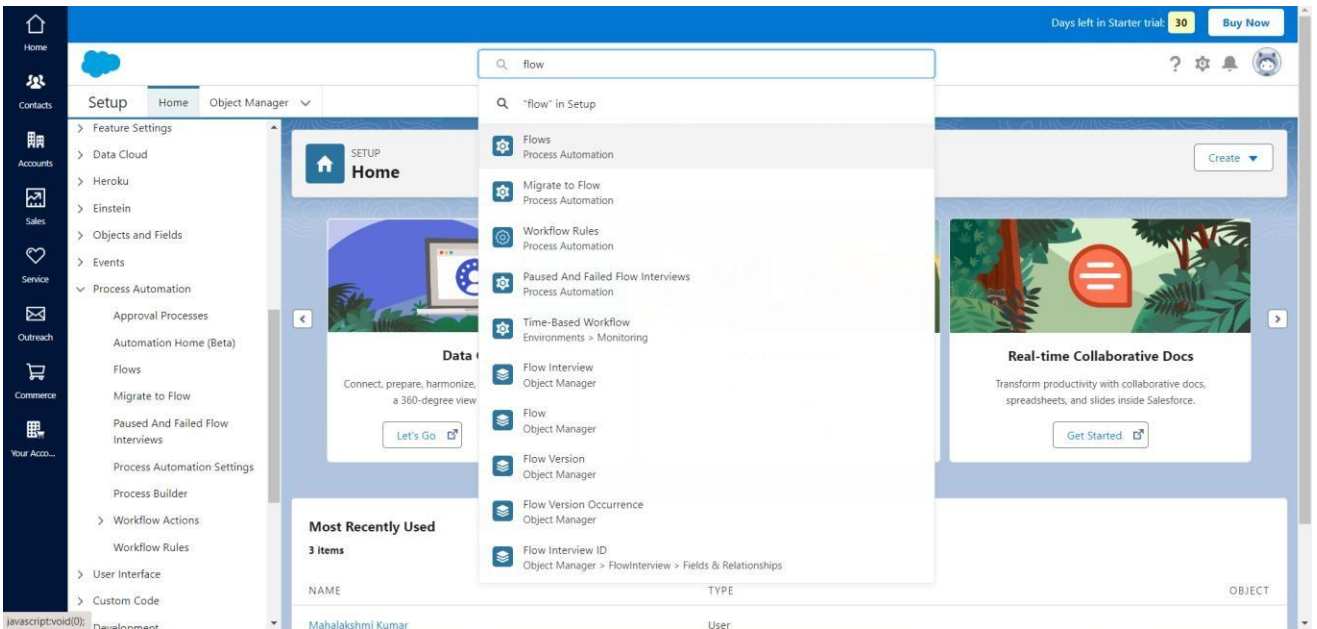
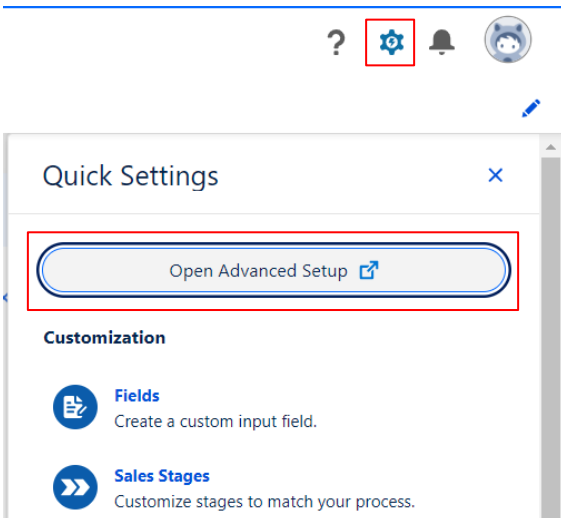
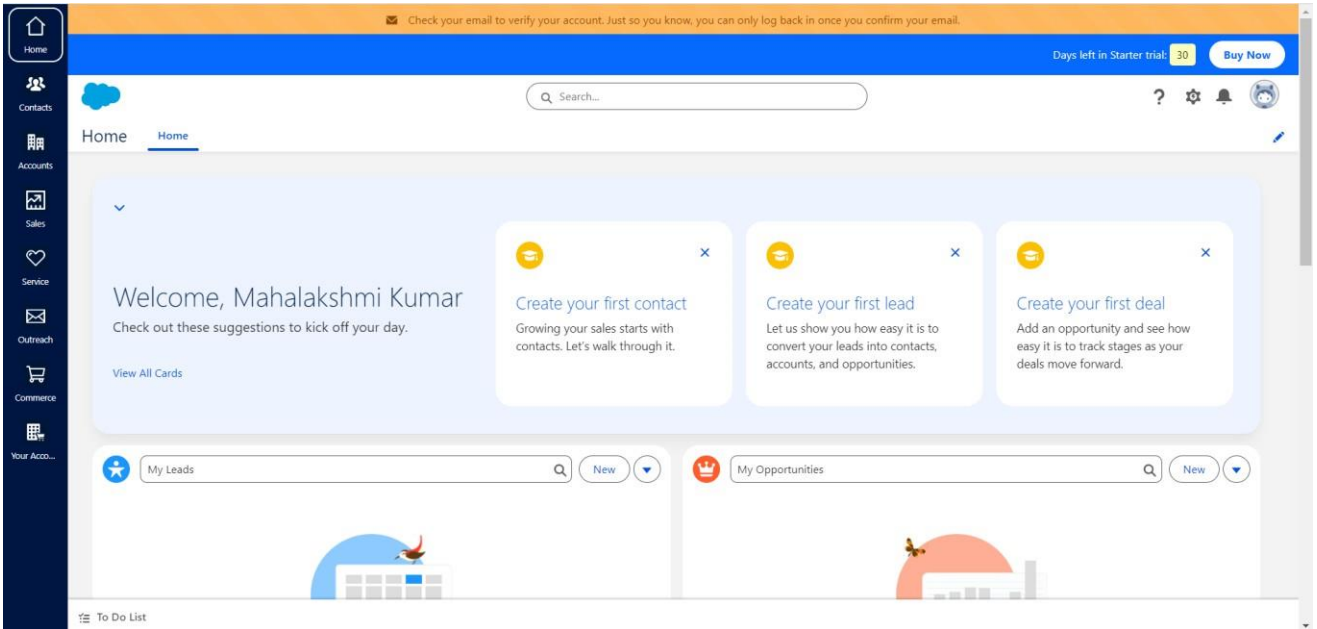
8. Activate and Save the Flow:

- 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:



Home

Contacts

Accounts

Sales

Service

Outreach

Commerce

Your Account

Setup

Home

Object Manager

Days left in Starter trial: 30 Buy Now

Search Setup

Flow Trigger Explorer

New Flow

SETUP

Flows

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	A...	Te...	Package State	P...	La...	La...
Cadence Autolaunched Flow: Update Lead Path	Cadence Autolaunched Flow		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cadence Autolaunched Flow: Update Opportunity ...	Cadence Autolaunched Flow		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cadence Autolaunched Flow: Update Contact and ...	Cadence Autolaunched Flow		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cadence Step Flow: Create a Case	Cadence Step Flow		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cadence Step Flow: Create an Event	Cadence Step Flow		<input type="checkbox"/>	<input checked="" type="checkbox"/>	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

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

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**

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:

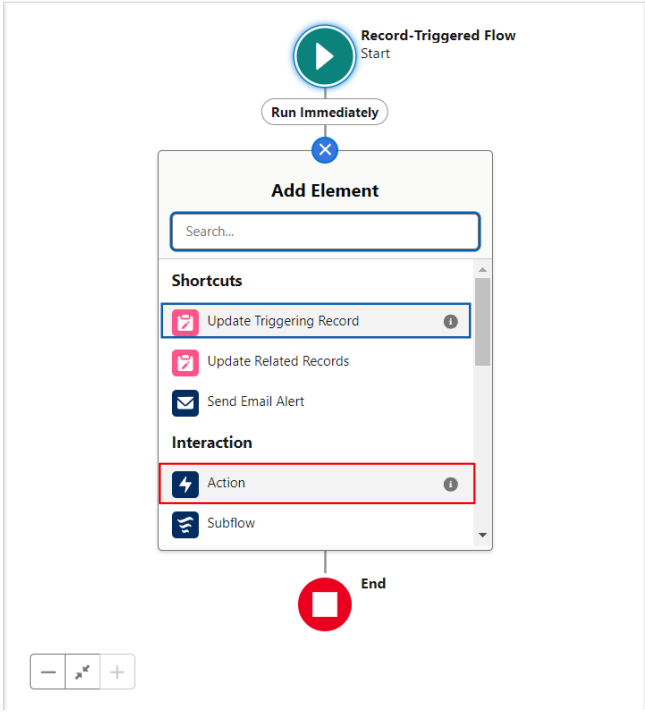
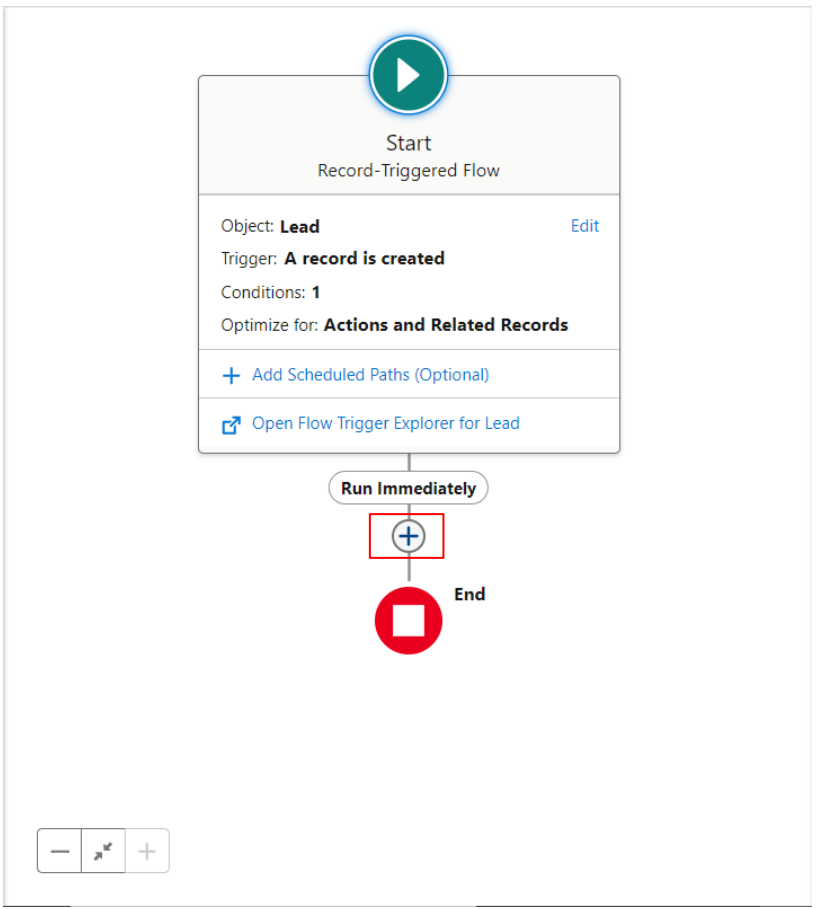
Fast Field Updates

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



The image displays two screenshots of the Salesforce Flow Builder interface. The top screenshot shows a 'Record-Triggered Flow' with a 'Start' node, a 'Run Immediately' node, an 'Action' node, and an 'End' node. A red box highlights the 'Action' node, and a search bar on the right shows 'send email' with the 'Send Email' action selected. The bottom screenshot shows the 'Send Email' action configuration panel. The flow is titled 'Email automation - V1' and is in 'Active' status. The 'Send Email' action is configured with the following settings:

- Log Email on Send: Not Included
- Recipient Address Collection: Not Included
- Recipient Address List: Included (Greetings)
- Recipient ID: Included
- Related Record ID: Not Included
- Rich-Text-Formatted Body: Not Included
- Sender Email Address: Not Included

RESULT:

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