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.

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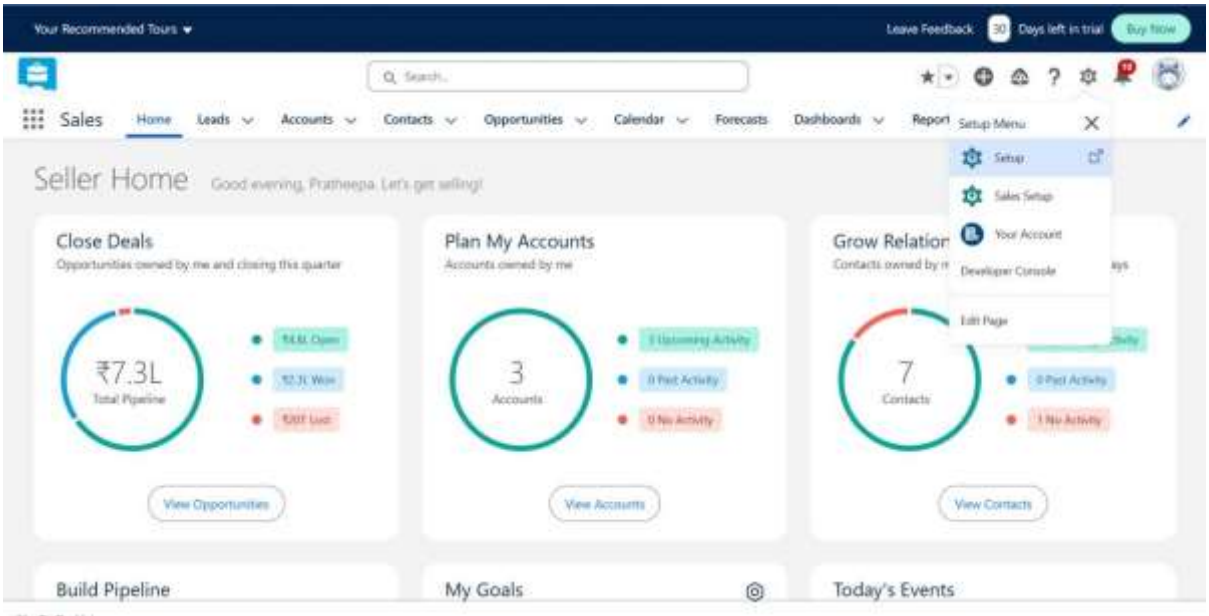
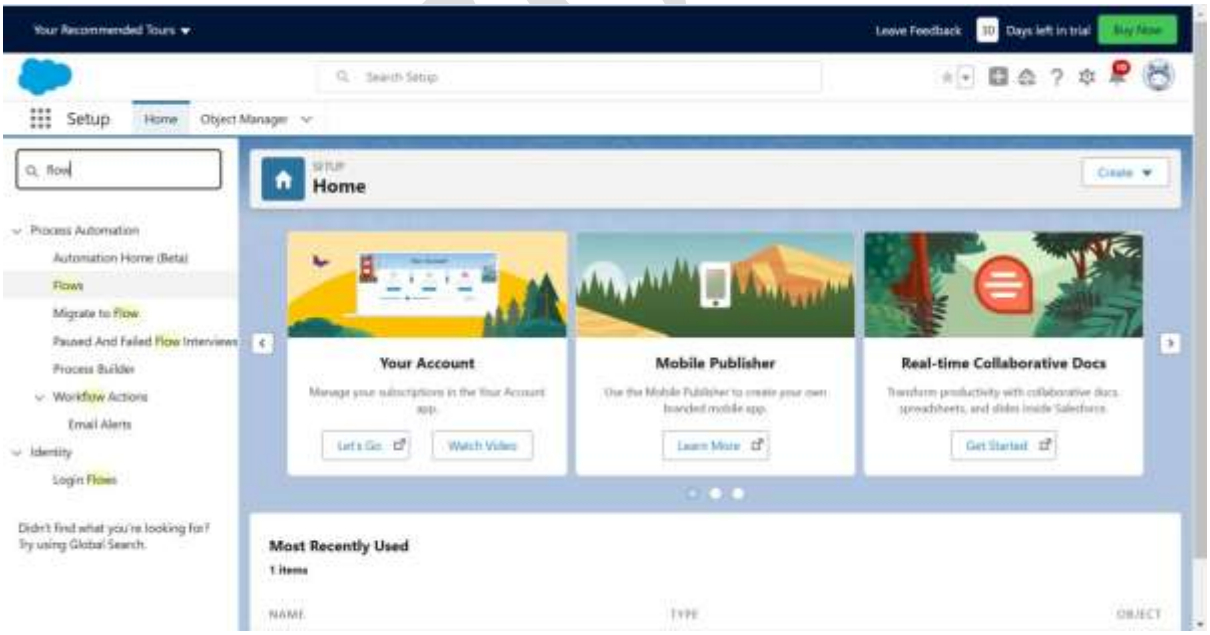
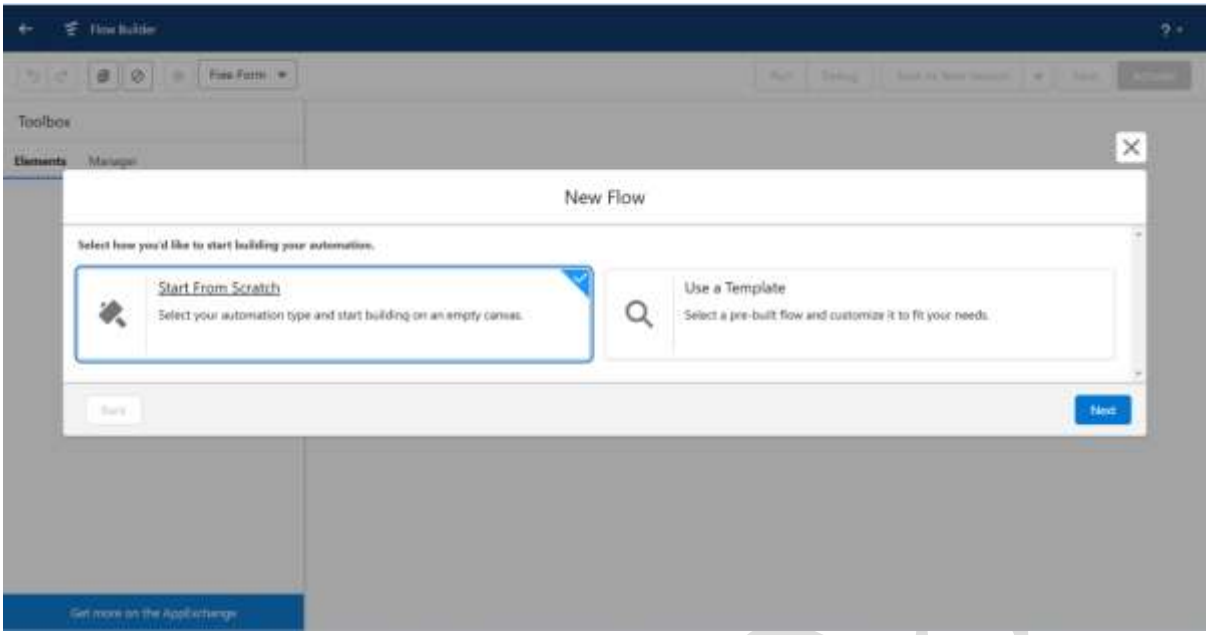
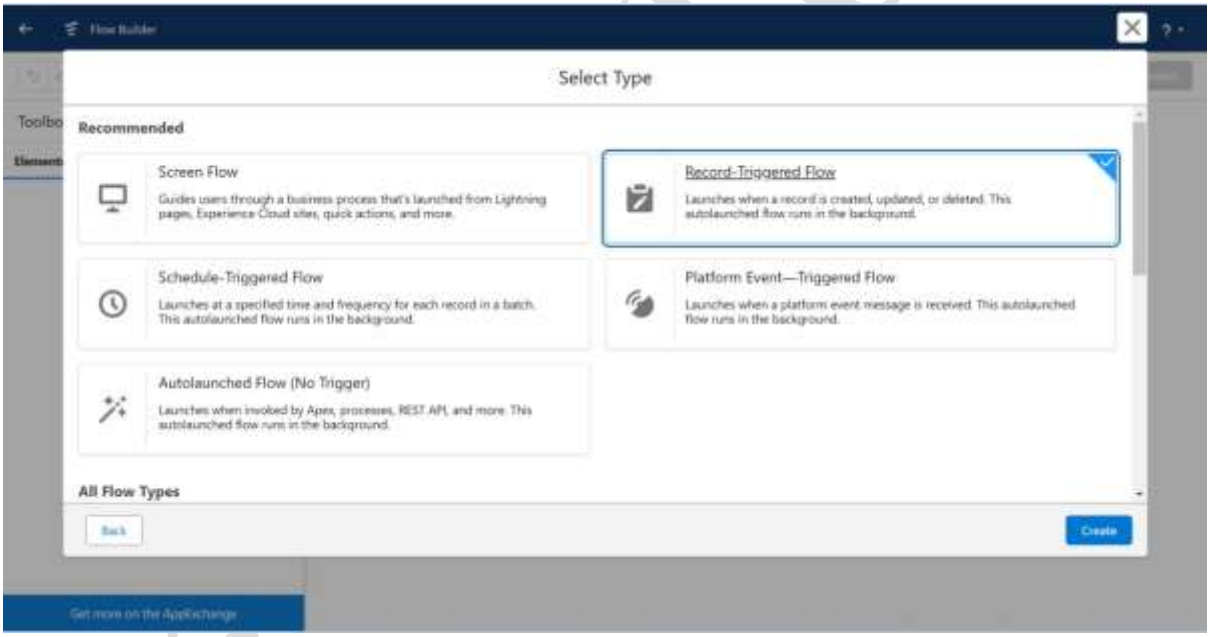
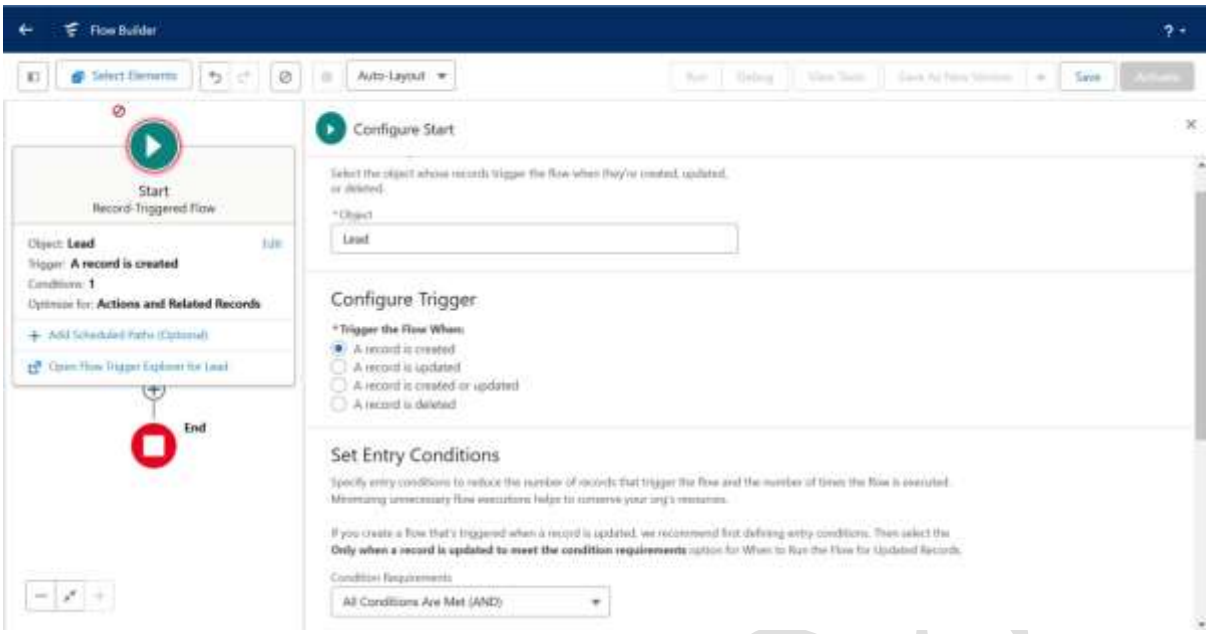
OUTPUT:

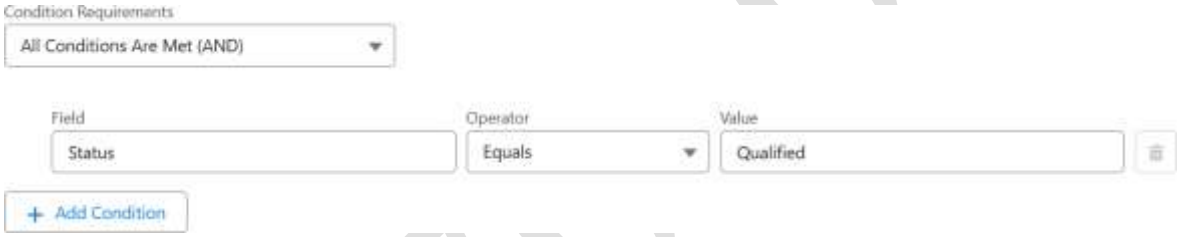

Your Recommended Tours
Leave Feedback
Days left in trial
Buy Now
Sales
Home
Leads
Accounts
Contacts
Opportunities
Calendar
Forecasts
Dashboards
Report
Setup Menu
Setup
Sales Setup
Your Account
Developer Console
Edit Page
Seller Home
Good evening, Pratheepa. Let's get selling!
Close Deals
Opportunities owned by me and closing this quarter
₹7.3L
Total Pipeline
Plan My Accounts
Accounts owned by me
3
Accounts
Grow Relation
7
Contacts
View Opportunities
View Accounts
View Contacts
Build Pipeline
My Goals
Today's Events

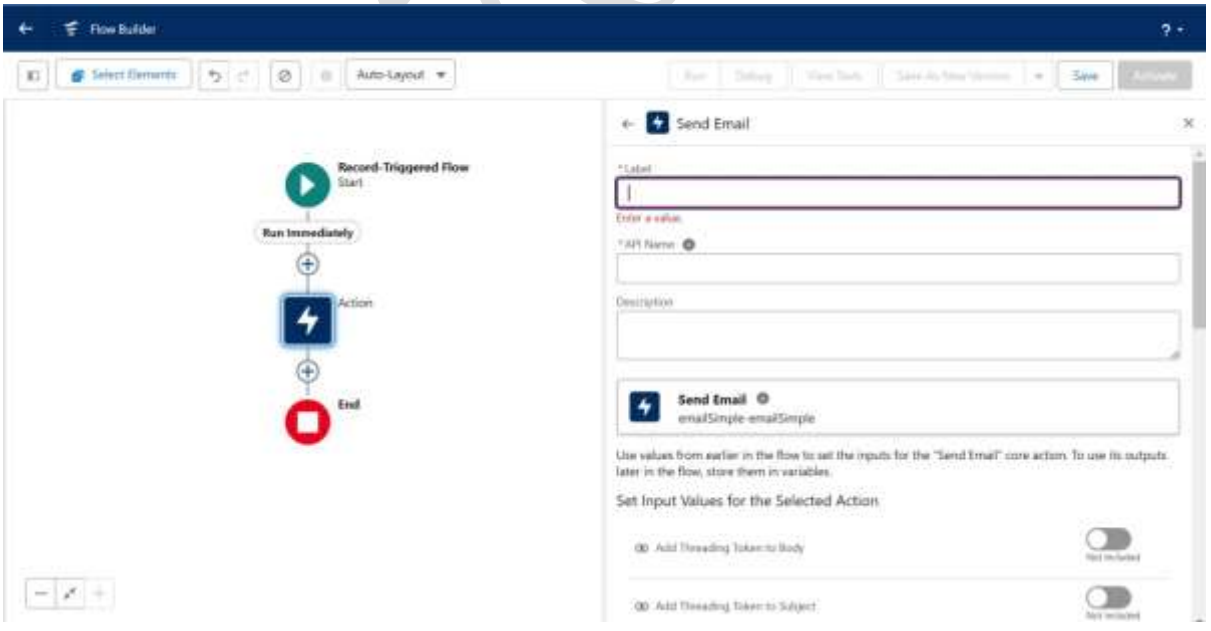

Your Recommended Tours
Leave Feedback
Days left in trial
Buy Now
Search Setup
Setup
Home
Object Manager
flow
Process Automation
Automation Home (Beta)
Flows
Migrate to Flow
Paused And Failed Flow Interviews
Process Builder
Workflow Actions
Email Alerts
Identity
Login Flows
Didn't find what you're looking for?
Try using Global Search.
SETUP
Home
Create
Your Account
Let's Go
Watch Video
Mobile Publisher
Learn More
Real-time Collaborative Docs
Get Started
Most Recently Used
1 items
NAME
TYPE
OBJECT

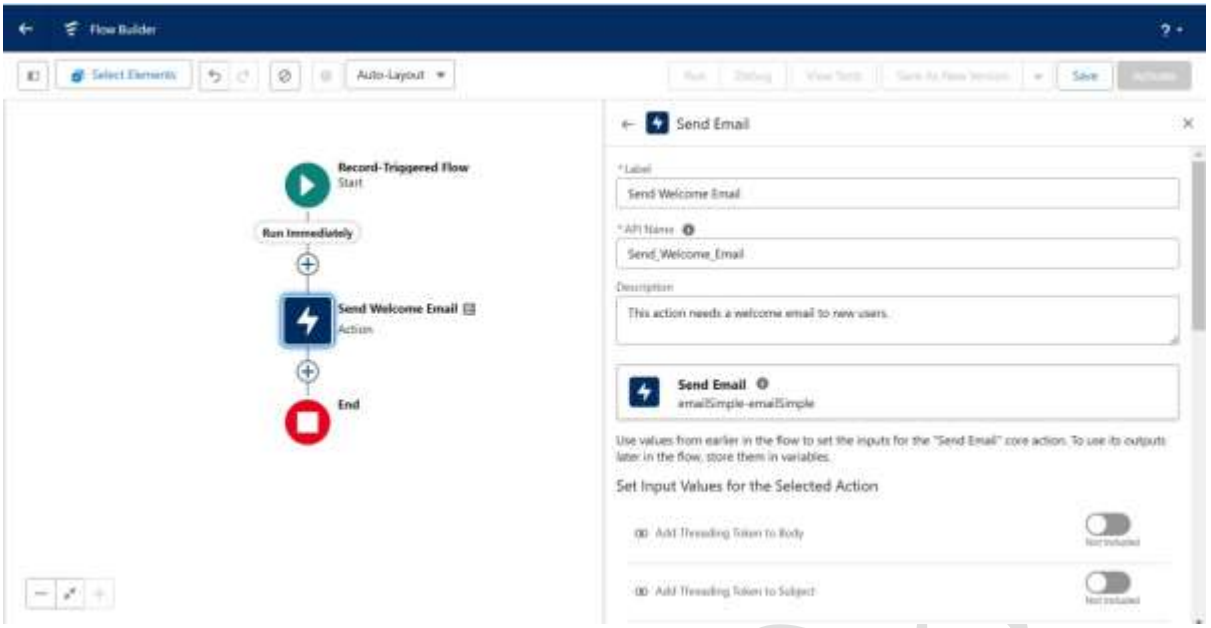

Flow Builder
Toolbox
Elements
Manager
New Flow
Select how you'd like to start building your automation.
Start From Scratch
Select your automation type and start building on an empty canvas.
Use a Template
Select a pre-built flow and customize it to fit your needs.
Next
Get more on the AppExchange

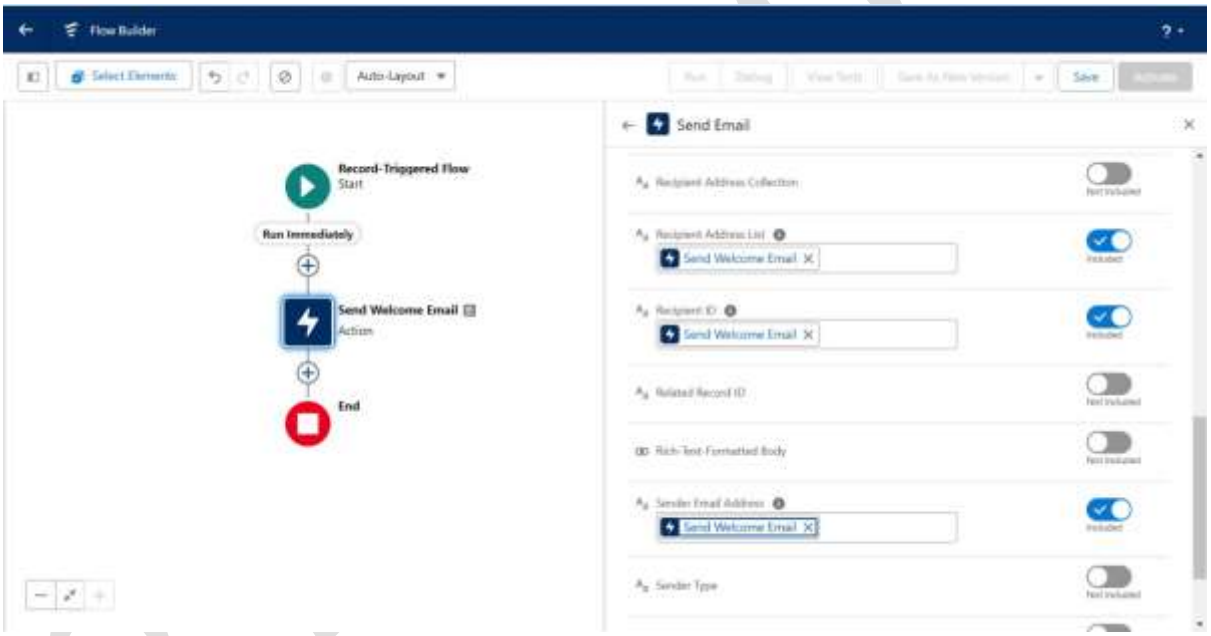

Flow Builder
Select Type
Recommended
Screen Flow
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
Record-Triggered Flow
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
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.
All Flow Types
Back
Create
Get more on the AppExchange


Flow Builder
Auto-Layout
Save
Start
Record-Triggered Flow
Object: Lead
Trigger: A record is created
Conditions: 1
Optimize for: Actions and Related Records
End
Configure Start
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
All Conditions Are Met (AND)


Condition Requirements
All Conditions Are Met (AND)
Field
Status
Operator
Equals
Value
Qualified
Add Condition


Flow Builder
Auto-Layout
Save
Record-Triggered Flow
Start
Run Immediately
Action
End
Send Email
Enter a value.
Send Email
emailSimple emailSimple
Set Input Values for the Selected Action





RESULT:

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

JANANI PRIYA N