Ex no: 7 **Roll no : 210701272**

DEVELOP A SIMPLE EMAIL AUTOMATION SERVICE USING SALESFORCE

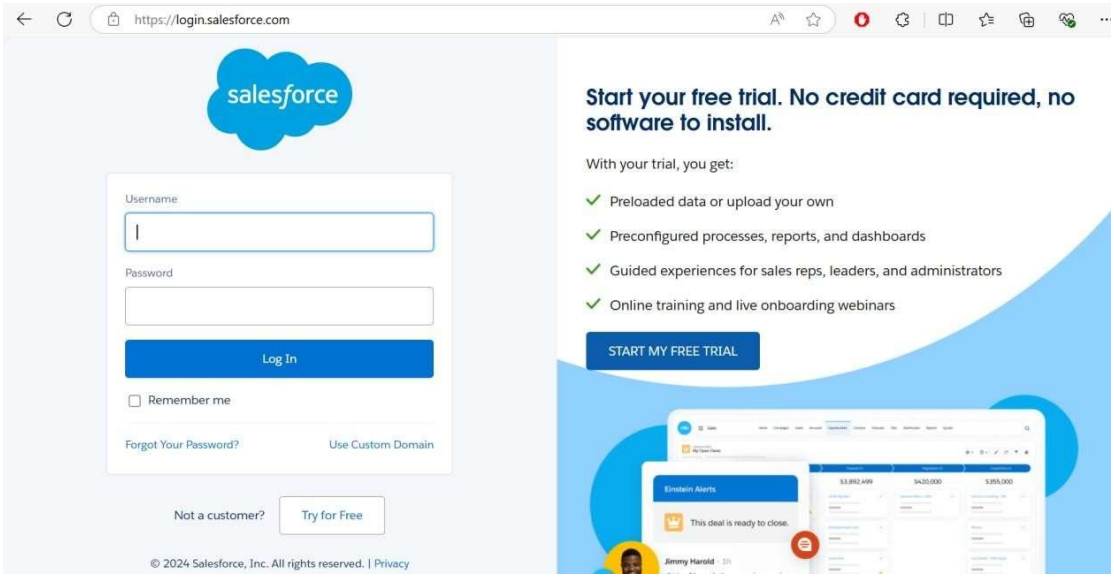
Aim:

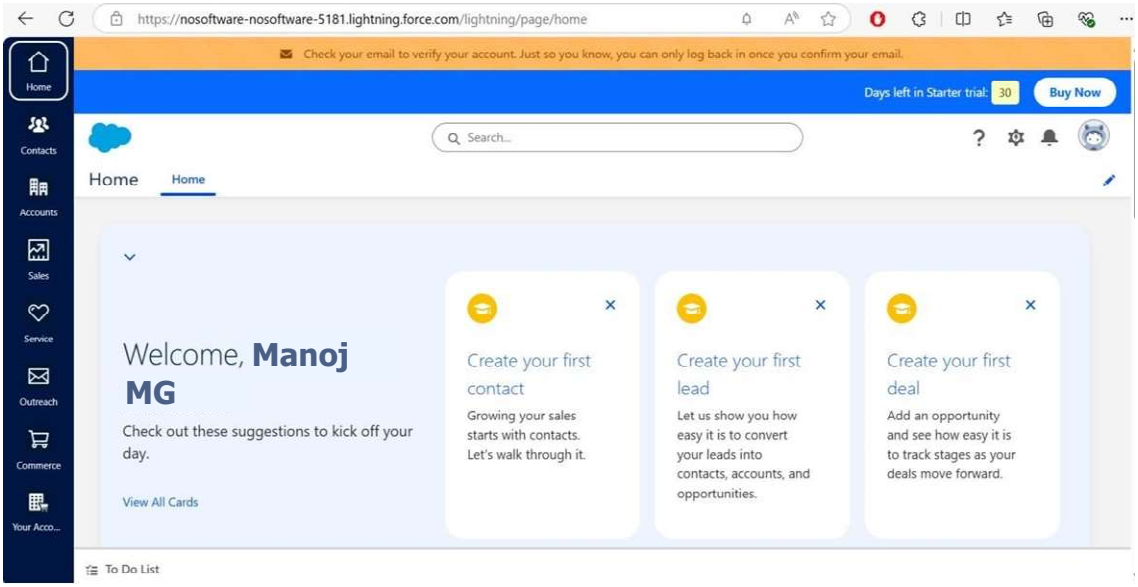
To develop a simple email automation service using salesforce.

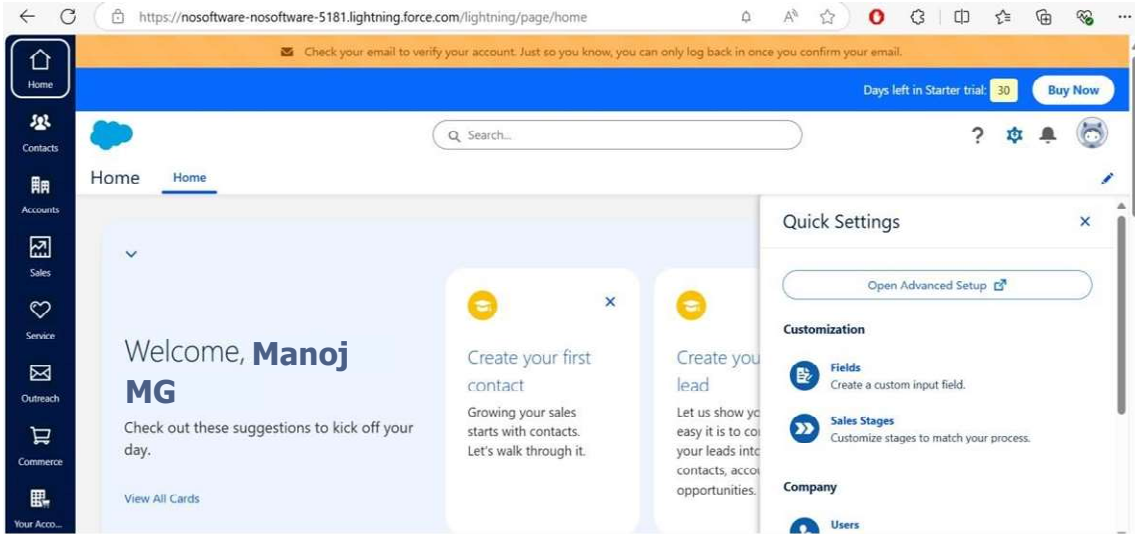
Procedure:

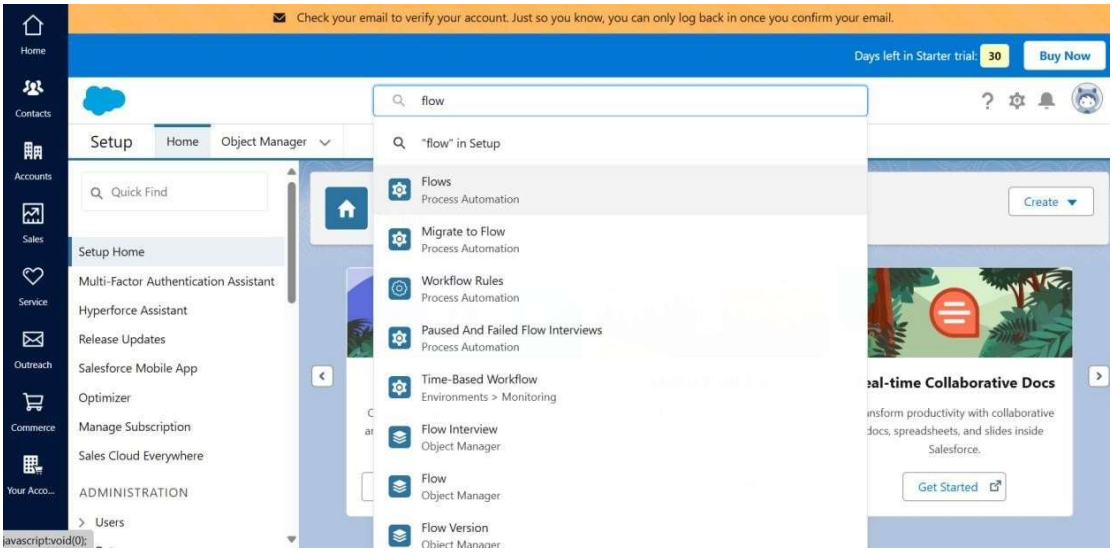
1. Create a Salesforce account.
2. Click on the settings icon on the top right corner of the home page and open the advanced setup page.
3. Search for flow in the search bar and click on Flows in Process Automation.
4. Create a new flow and select the flow type as Record-Triggered Flow to start an automation 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.

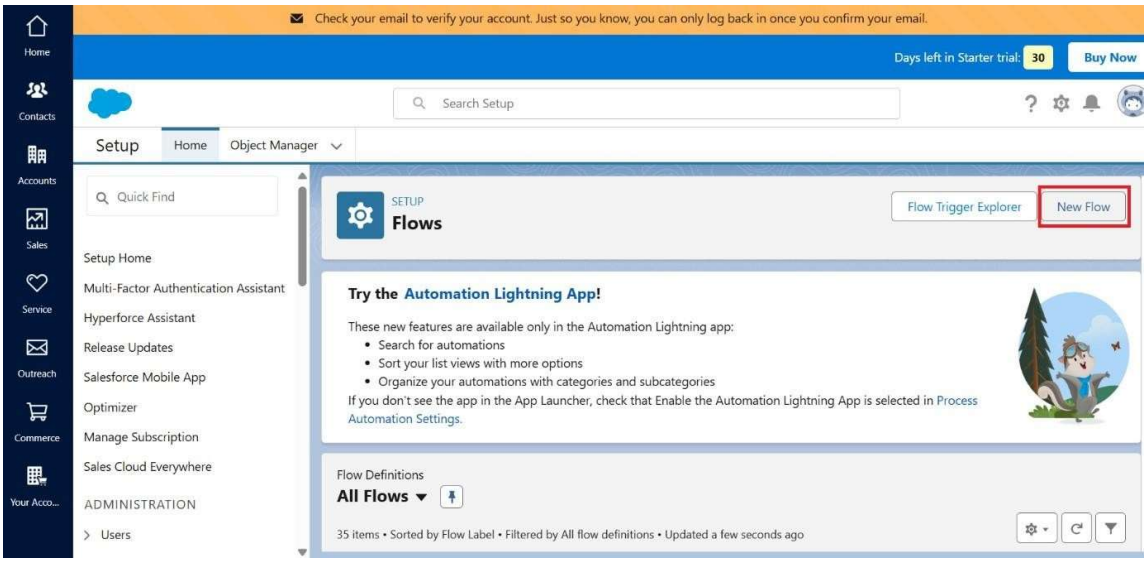
Output:

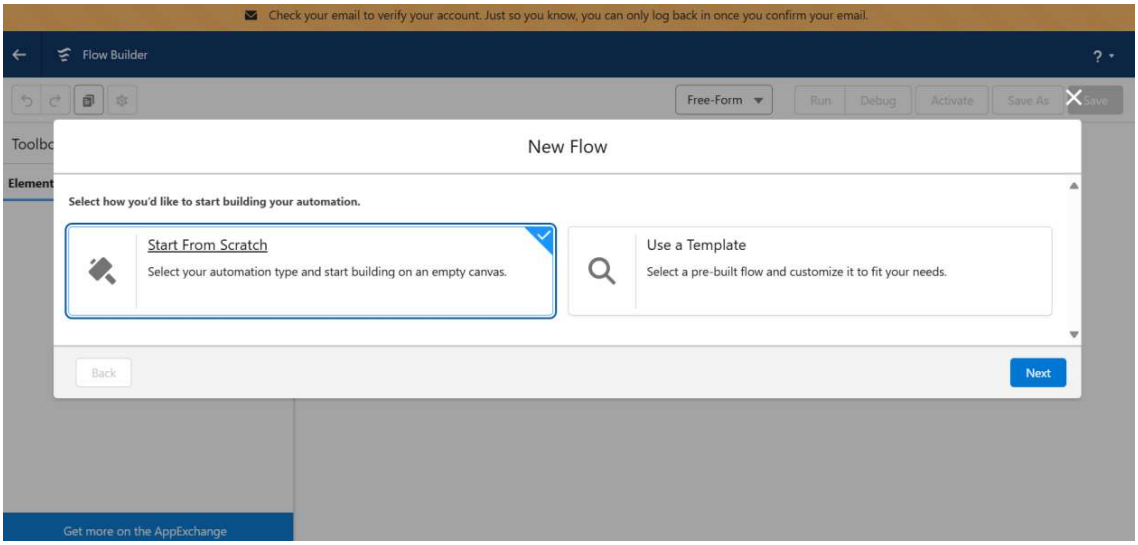


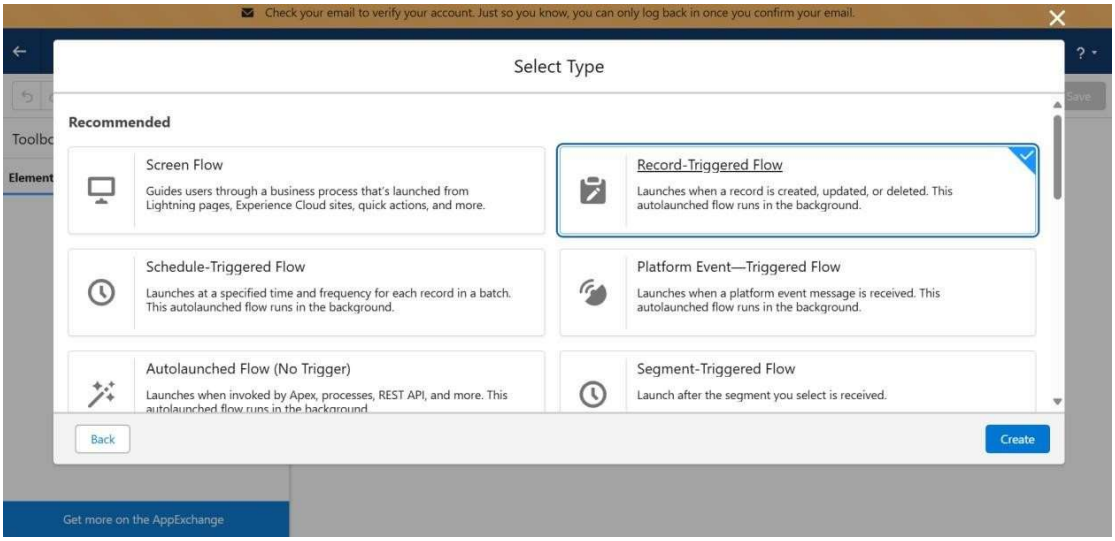

https://nosoftware-nosoftware-5181.lightning.force.com/lightning/page/home
Check your email to verify your account. Just so you know, you can only log back in once you confirm your email.
Days left in Starter trial: 30
Buy Now
Search...
Home
Home
Welcome, Manoj MG
Check out these suggestions to kick 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.
To Do List

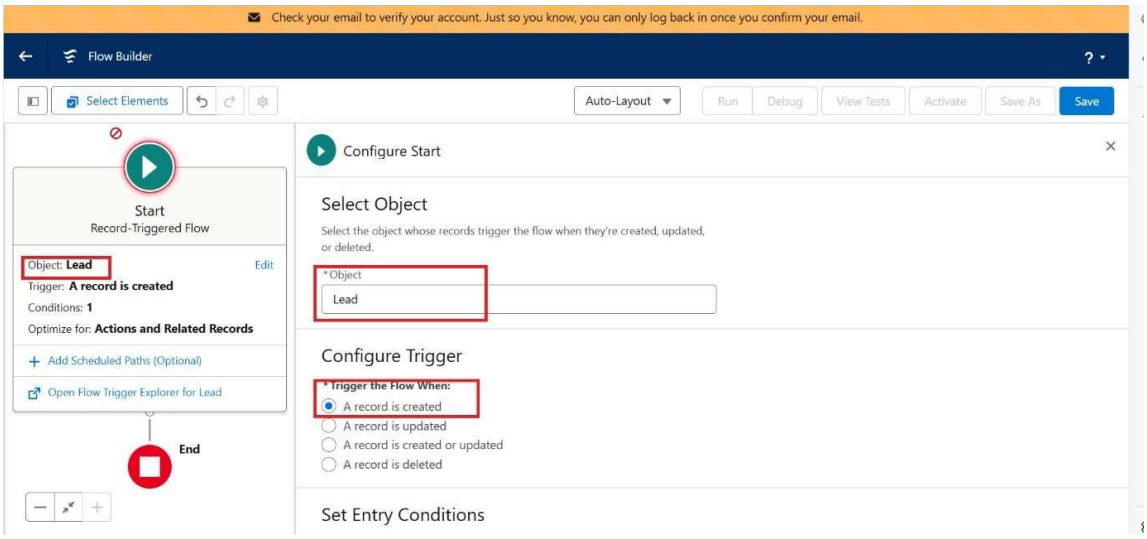

https://nosoftware-nosoftware-5181.lightning.force.com/lightning/page/home
Check your email to verify your account. Just so you know, you can only log back in once you confirm your email.
Days left in Starter trial: 30
Buy Now
Search...
Home
Home
Quick Settings
Open Advanced Setup
Customization
Fields
Create a custom input field.
Sales Stages
Customize stages to match your process.
Company
Users
Welcome, Manoj MG
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.

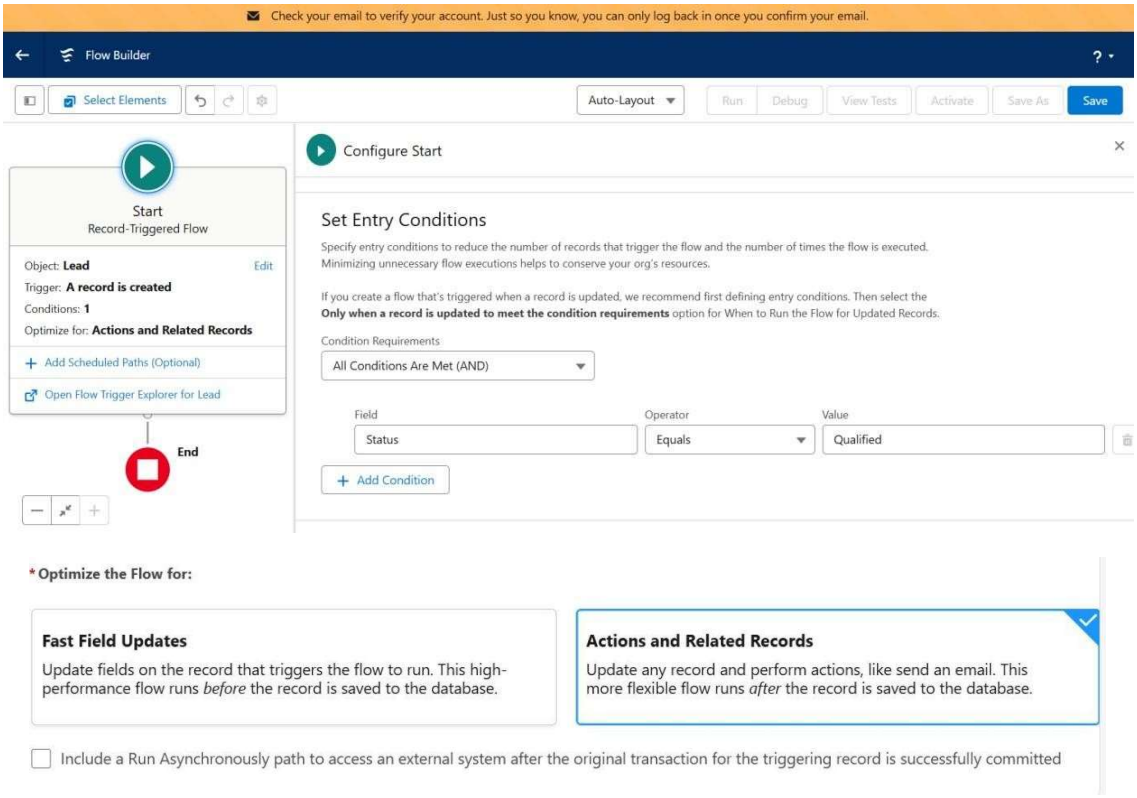

Check your email to verify your account. Just so you know, you can only log back in once you confirm your email.
Days left in Starter trial: 30
Buy Now
flow
Setup
Home
Object Manager
"flow" in Setup
Flows
Process Automation
Migrate to Flow
Process Automation
Workflow Rules
Process Automation
Paused And Failed Flow Interviews
Process Automation
Time-Based Workflow
Environments > Monitoring
Flow Interview
Object Manager
Flow
Object Manager
Flow Version
Object Manager
Quick Find
Setup Home
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Optimizer
Manage Subscription
Sales Cloud Everywhere
ADMINISTRATION
Users
Create
eal-time Collaborative Docs
nsform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.
Get Started


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 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
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 Flow Label • Filtered by All flow definitions • Updated a few seconds ago

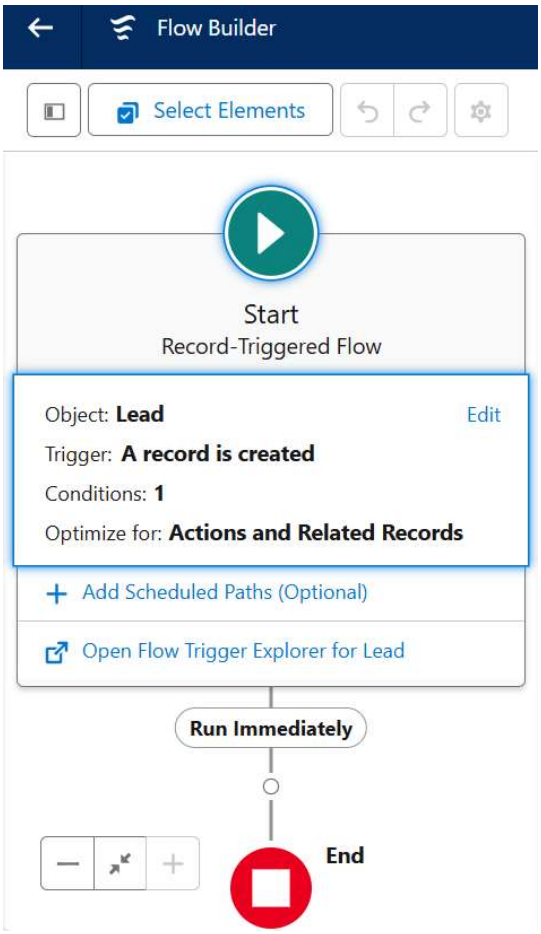

Check your email to verify your account. Just so you know, you can only log back in once you confirm your email.
Flow Builder
Free-Form
Run
Debug
Activate
Save As
Save
New Flow
Select how you'd like to start building your automation.
Start From Scratch
Select your automation type and start building on an empty canvas.
Use a Template
Select a pre-built flow and customize it to fit your needs.
Back
Next
Get more on the AppExchange

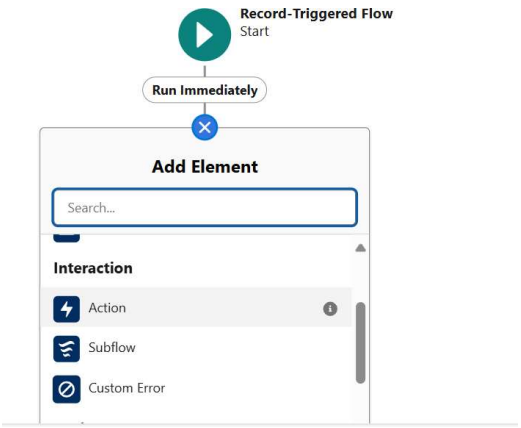

Check your email to verify your account. Just so you know, you can only log back in once you confirm your email.
Select Type
Recommended
Screen Flow
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
Record-Triggered Flow
Launches 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.
Back
Create
Get more on the AppExchange

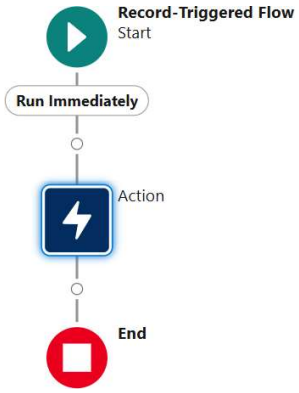

Check your email to verify your account. Just so you know, you can only log back in once you confirm your email.
Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Activate
Save As
Save
Start
Record-Triggered Flow
Object: Lead
Edit
Trigger: A record is created
Conditions: 1
Optimize for: Actions 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

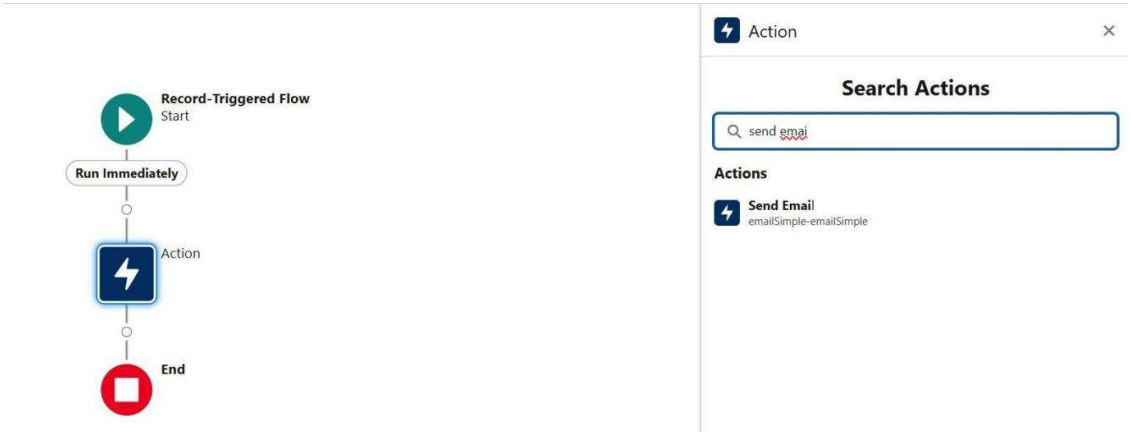

Check your email to verify your account. Just so you know, you can only log back in once you confirm your email.
Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Activate
Save As
Save
Start
Record-Triggered Flow
Object: Lead
Edit
Trigger: A record is created
Conditions: 1
Optimize for: Actions 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

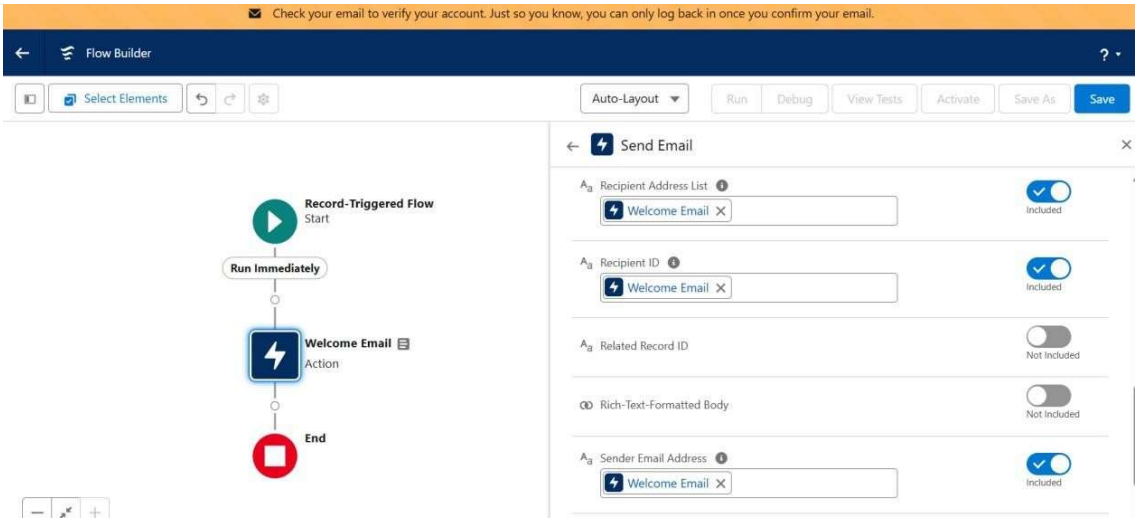
*Optimize the Flow for:
Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.
Actions and Related Records
Update any record and perform actions, like send an email. This more flexible flow runs after the 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


Record-Triggered Flow
Start
Run Immediately
Add Element
Search...
Interaction
Action
Subflow
Custom Error







Result:

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