

Ex no: 7

DEVELOP A SIMPLE EMAIL AUTOMATION SERVICE USING SALESFORCE

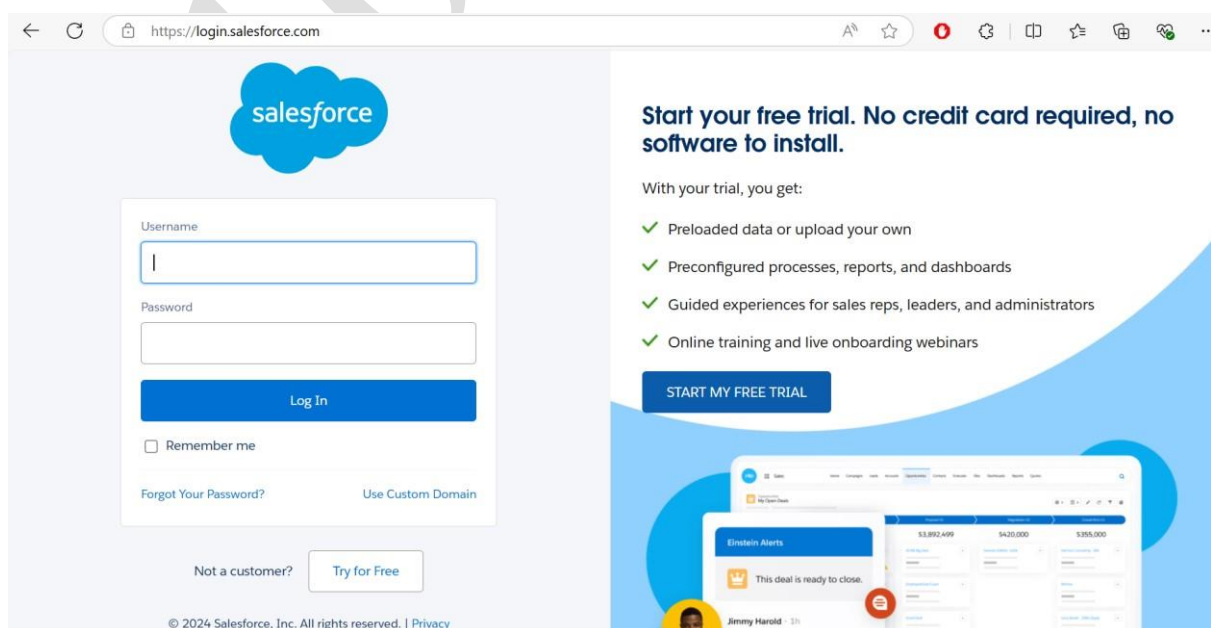
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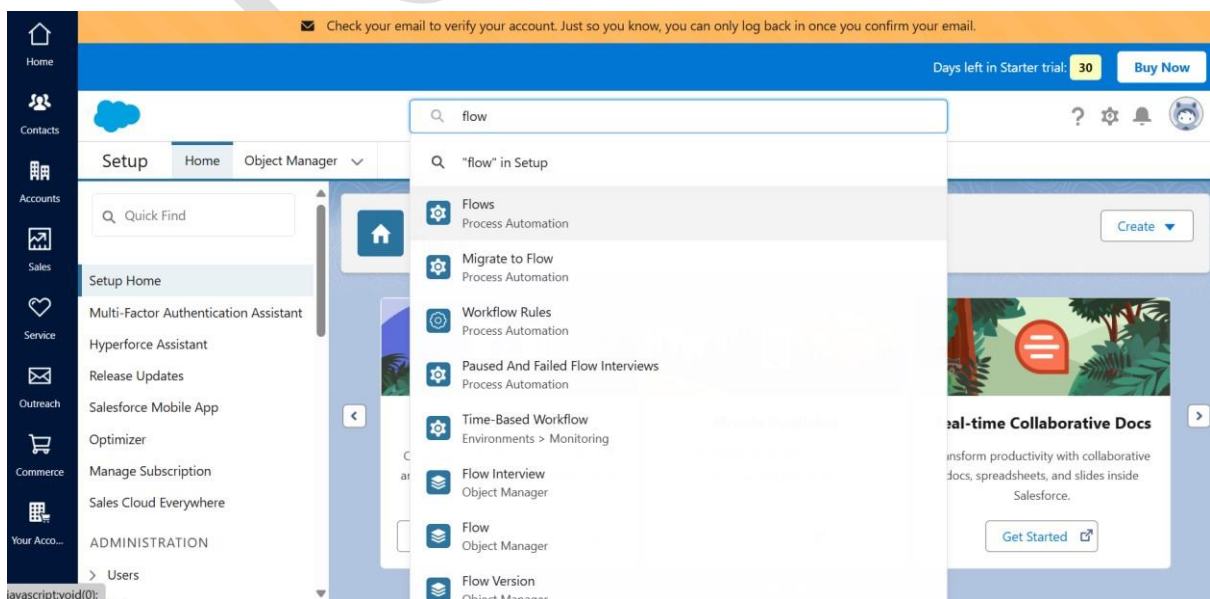
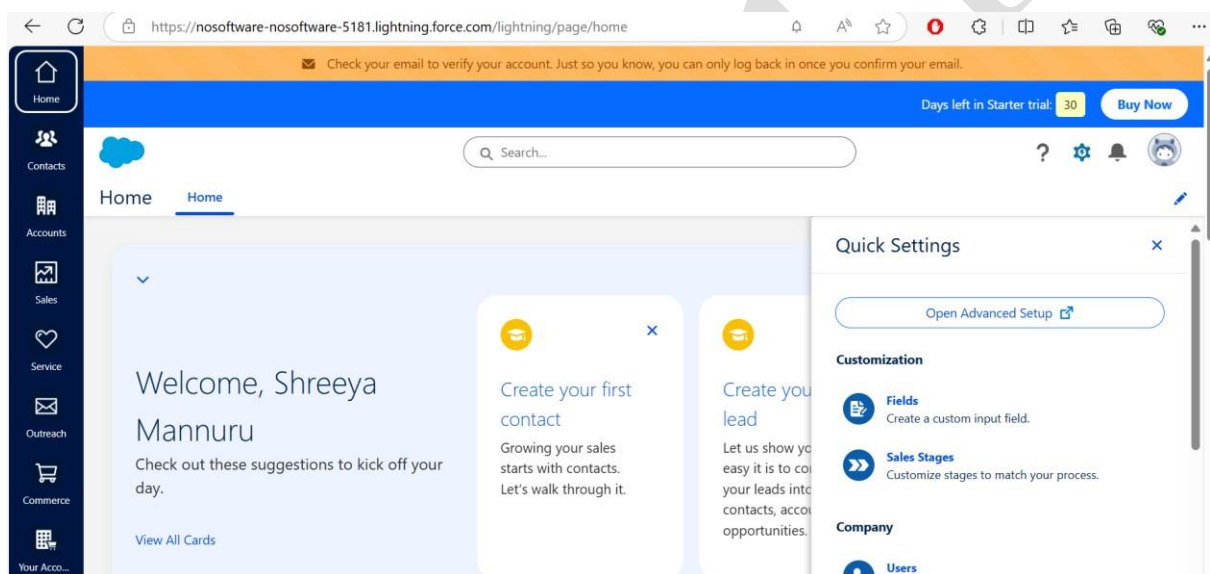
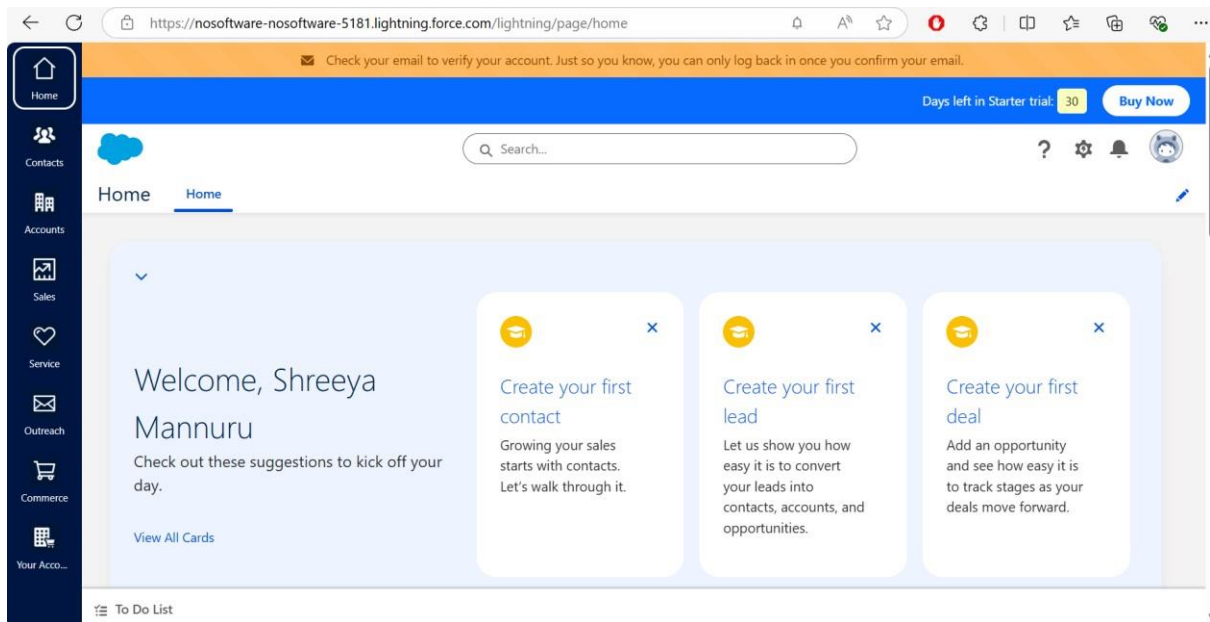
To develop a simple email automation service using salesforce.

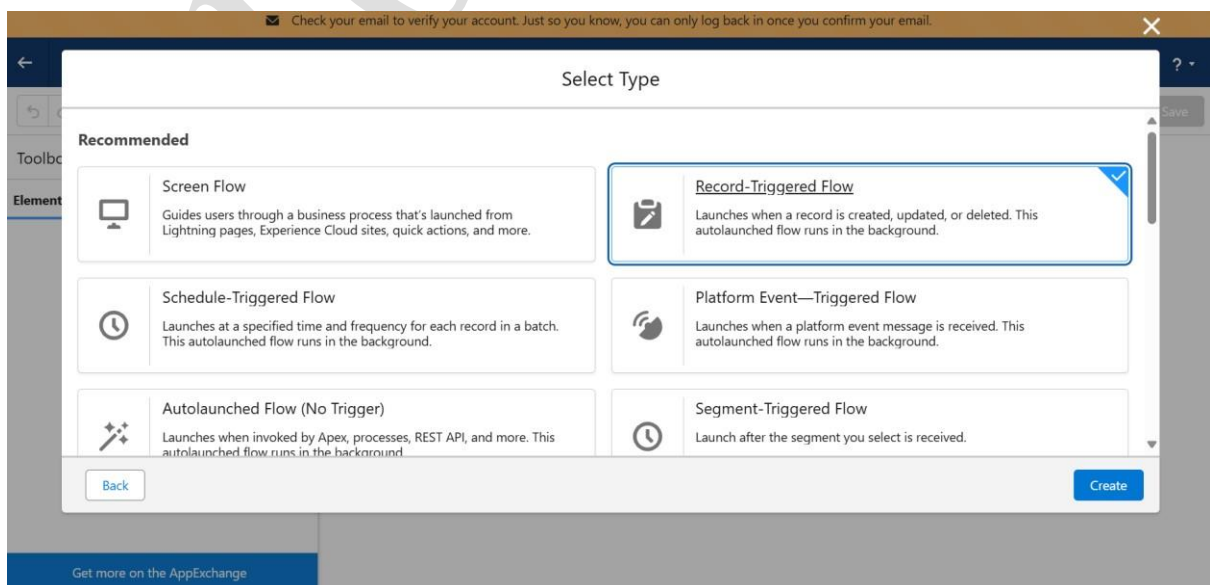
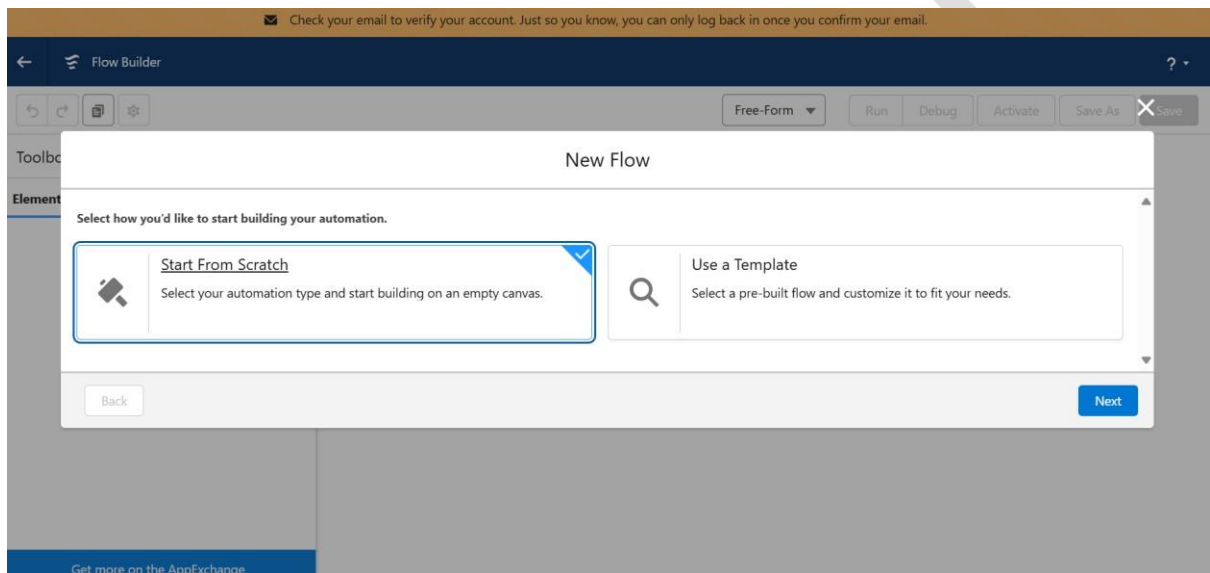
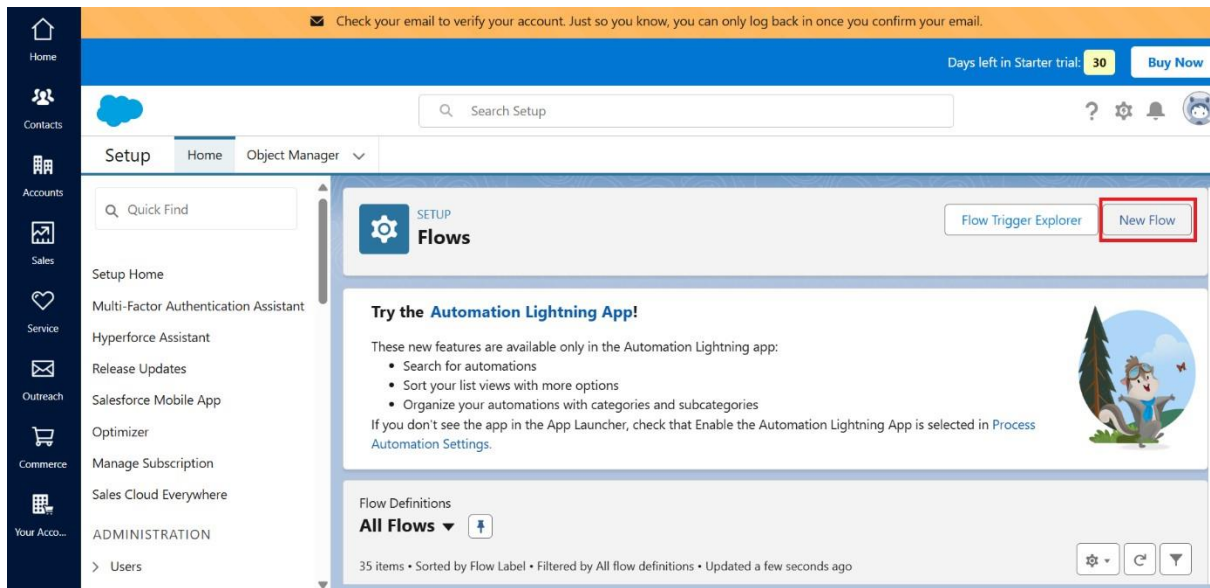
Procedure:

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:







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**

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**

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:

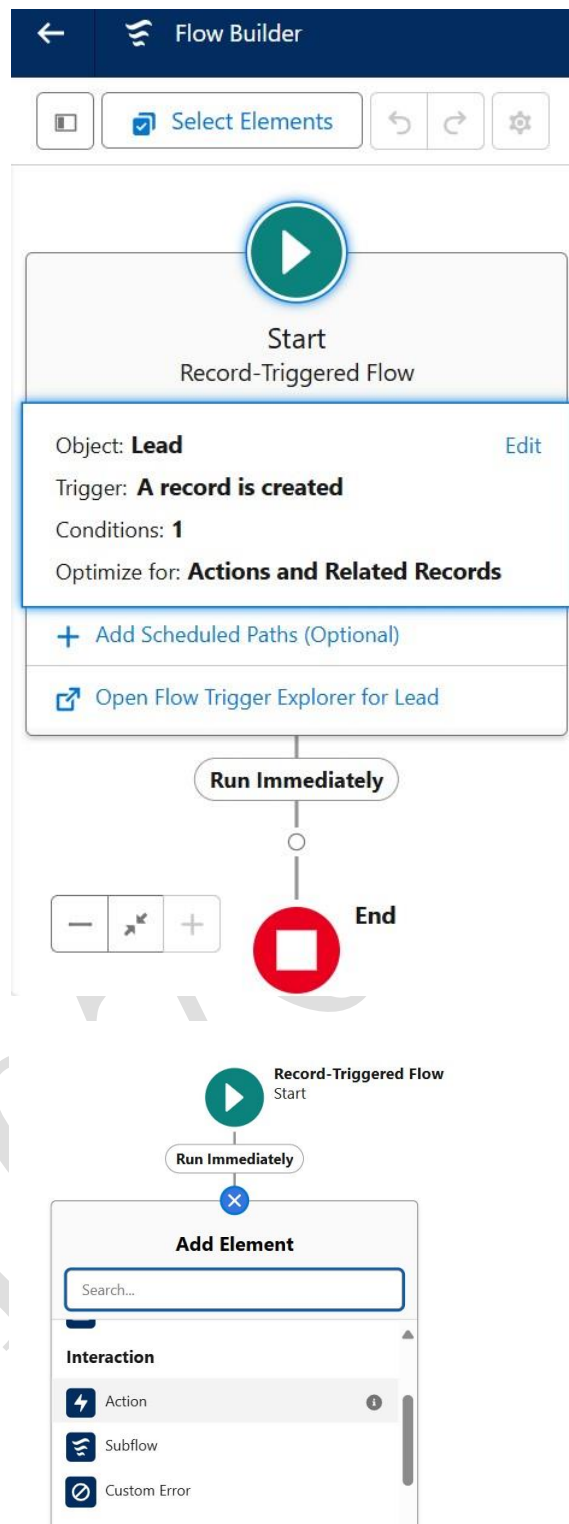
Fast Field Updates

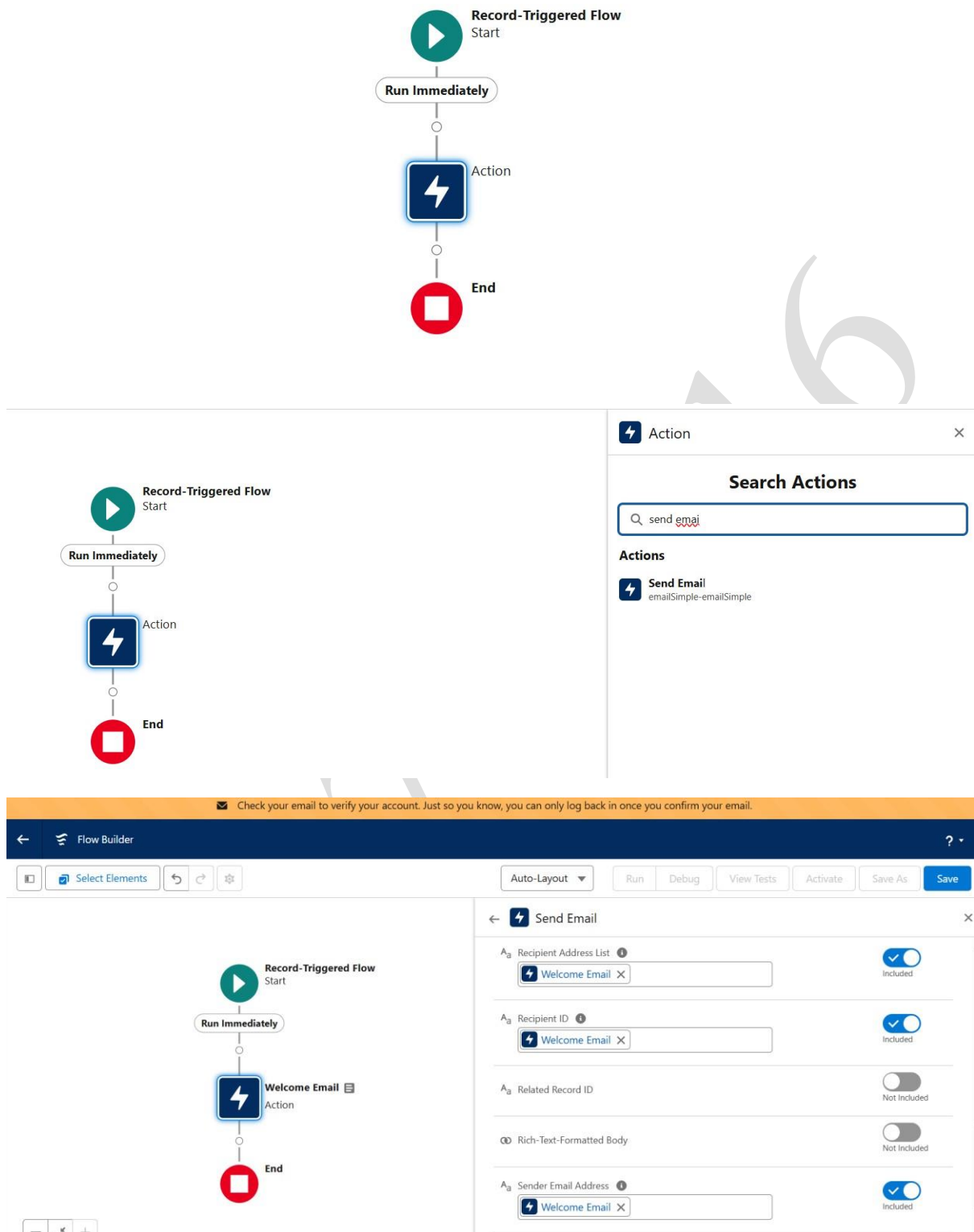
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

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.





Result:

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