

**Ex no: 7**

**Rollno:210701289**

## **DEVELOP A SIMPLE EMAIL AUTOMATION SERVICE USING SALESFORCE**

**Aim:**

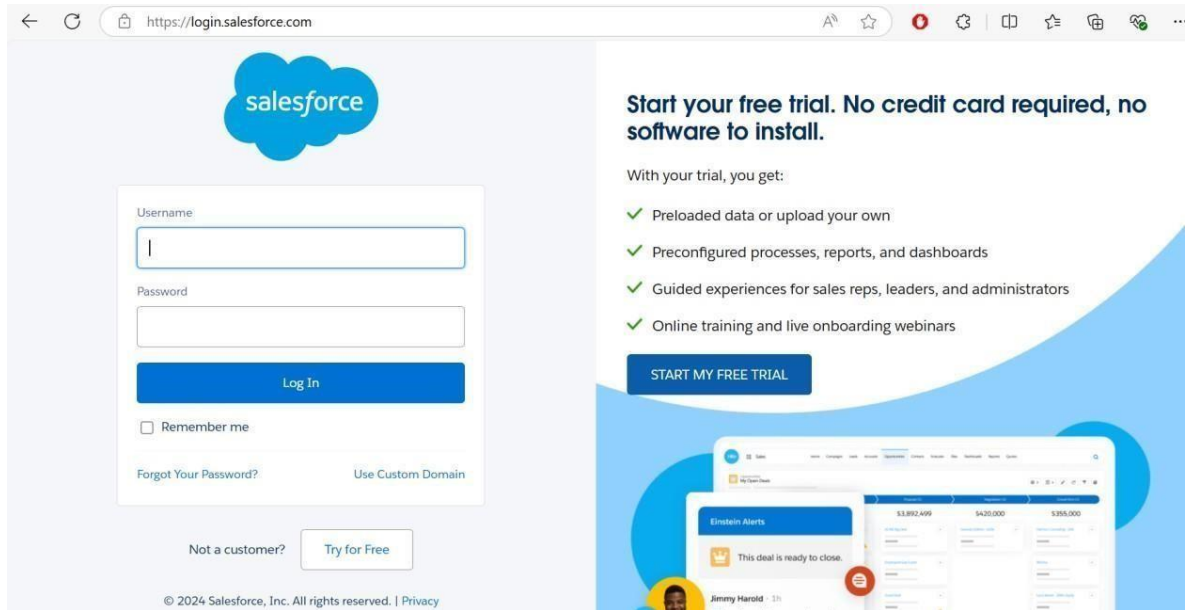
To develop a simple email automation service using salesforce.

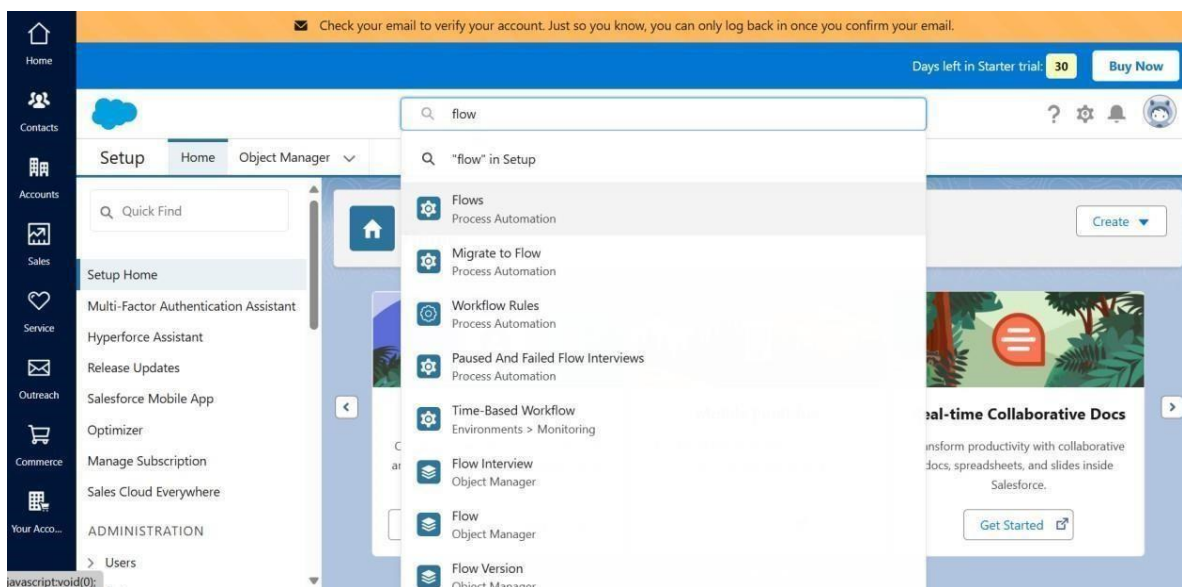
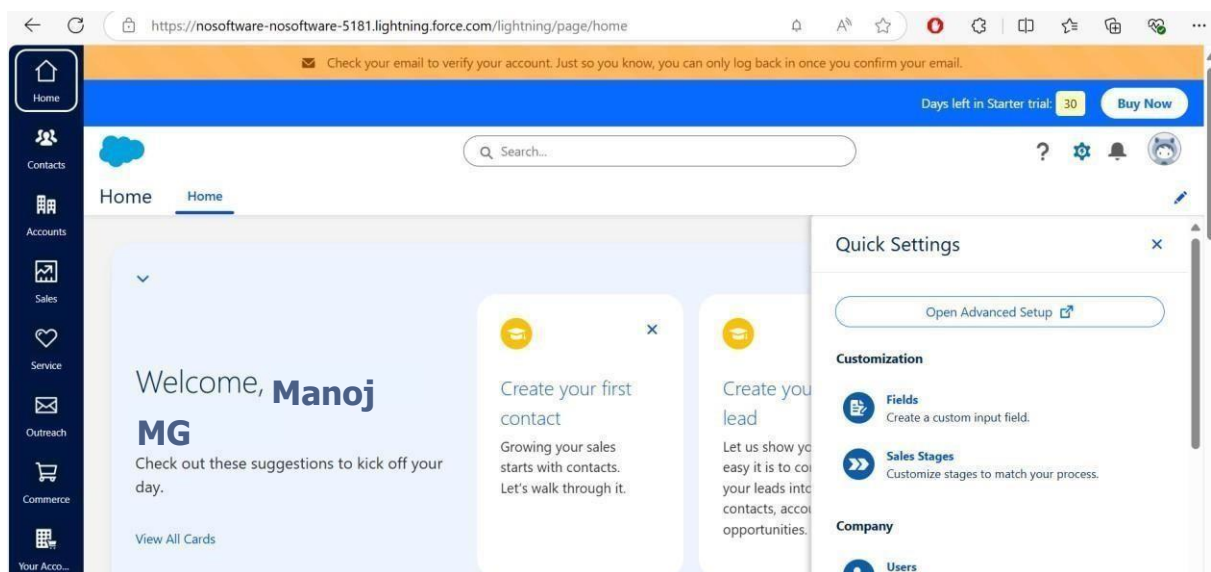
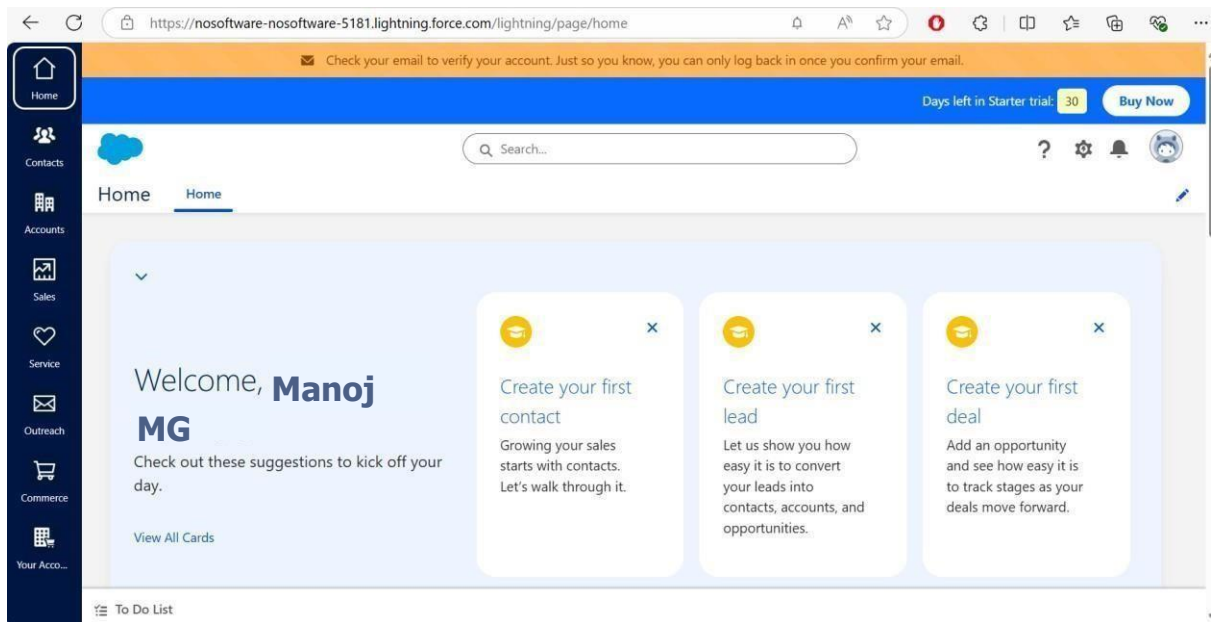
**Procedure:** 1. Create a Salesforce

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:**





Home

Contacts

Accounts

Sales

Service

Outreach

Commerce

Your Account

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

Multi-Factor Authentication Assistant

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Optimizer

Manage Subscription

Sales Cloud Everywhere

ADMINISTRATION

Users

Quick Find

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

Status

Operator

Equals

Value

Qualified

+ Add Condition

\* Optimize the Flow for:

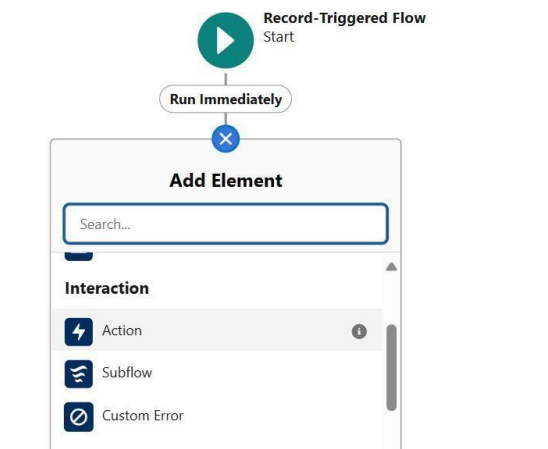
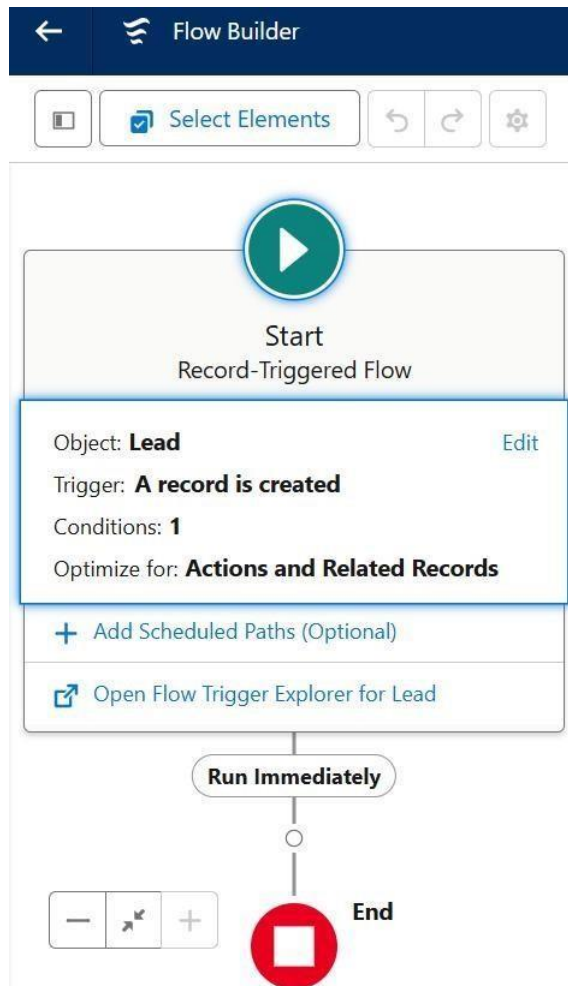
**Fast Field Updates**

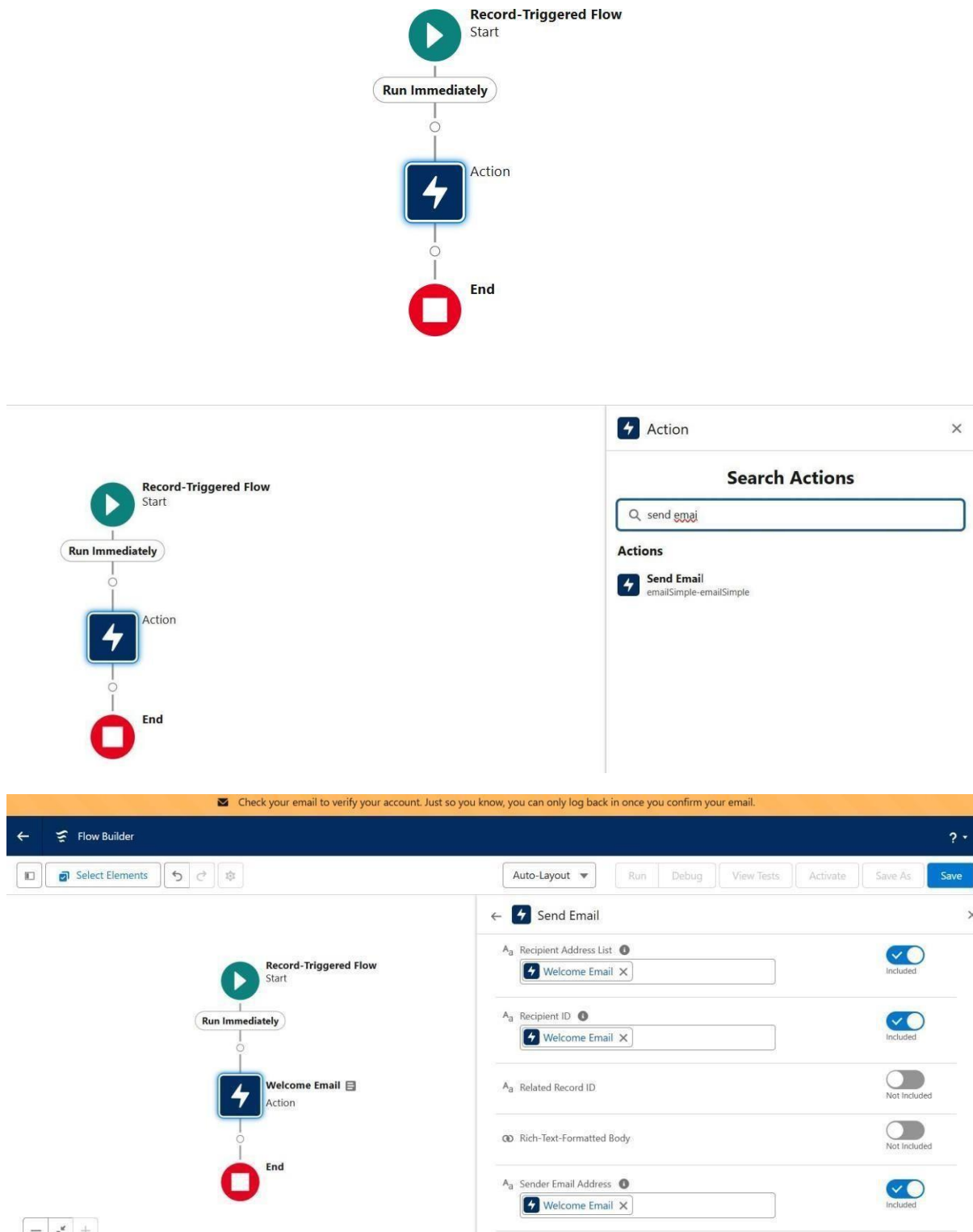
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

**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





## Result:

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