built.io® flow enterprise™

for

salesforce

Integrate business apps with Built.io Flow

How would you like to save time with every interaction you have with Salesforce? Built.io Flow helps you do just that. It allows you to connect your Salesforce account with hundreds of web services to automate a myriad of processes related to Salesforce.

What is Built.io Flow ?

Built.io Flow is an **integration Platform-as-a-Service (iPaaS)** that enables organizations to integrate and orchestrate business processes across multiple systems. It facilitates data transfer and interaction between separate apps via an incredibly-easy-to-use interface. You can pick and choose from an extensive list of pre-built activities and create your own custom business process or 'flow' using simple drag-and-drop tools.

How does Built.io Flow integrate with Salesforce?

Built.io Flow provides triggers and activities that help you automate all the tasks related to Salesforce.

Here are some of the things you can accomplish with Built.io Flow and Salesforce integration.

- **Perform actions in 3rd party applications when an event happens in your Salesforce account:** You can trigger actions automatically in other web applications whenever a new contact, account, lead, opportunity, or case is created in your Salesforce account. For instance, you can automatically send an email to all your team members whenever a new opportunity is created.

- **Easily connect Salesforce with other popular apps:** This integration platform allows you to push data to your Salesforce account from any other web application, or pull data from your Salesforce account and send it to other apps. All this can be done without any manual intervention.

- **Execute routine Salesforce tasks in seconds:** With Built.io Flow, you can perform all Salesforce tasks in a matter of seconds. It allows you to create a new Salesforce account, campaigns, email templates, and records. You can also add new users, contacts, leads, opportunities, and tasks in your Salesforce account, as well as delete or update an existing Salesforce record.

How to use Built.io Flow with Salesforce

There are endless ways you could use Built.io Flow with Salesforce. To help you get started, let's look at a simple example. **In this scenario**, we will create a flow that will automatically **send an SMS** (using Twilio) to a designated salesperson whenever a **new lead** is created in your **Salesforce** account. It will also create a **new task** in the salesperson's **Wunderlist** account, so that a follow-up action is logged.
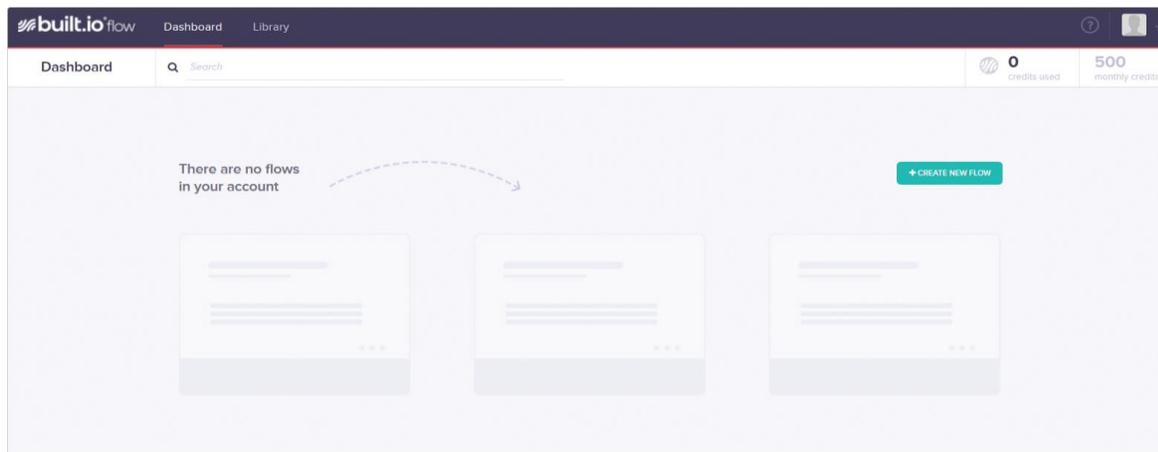
Here are the steps to configure this flow:

Step 1. Get a Built.io Flow account

If you already have an account with Built.io Flow, log in to flow.built.io using your credentials. Else, you can request an account by visiting this page.

Step 2. Create triggers

Your dashboard will look like this when you log in for the first time:

Click on the **+ CREATE NEW FLOW** link to create a new flow. As soon as you click on this button, you will notice a blank dashboard, with **'Start'** and **'Stop'** icons on it. This is your flow workspace, or canvas, where you will create your own flows by adding activities.

Step 2.1. Add Salesforce trigger

Before we add any activity, let us create a trigger for Salesforce '**New Lead**'. A trigger is a powerful tool that automatically launches a flow when a defined event happens. Here, the event is the creation of a new lead in Salesforce.

To add a new trigger, toggle the small button located just below the start icon to the "on" position. The new window that pops up will help you configure the corresponding trigger. Navigate to 'Salesforce' in the library of triggers on the right.
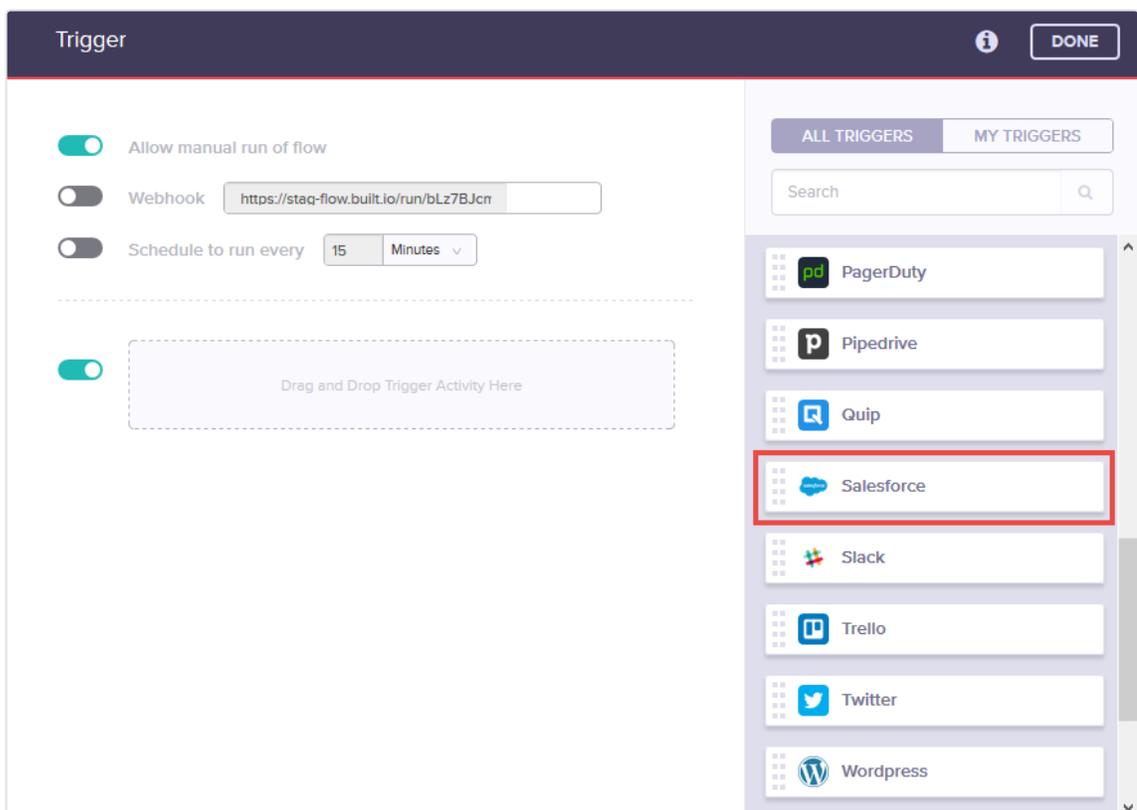
Step 2.2. Configure Salesforce trigger

Drag and drop the 'Salesforce' trigger into the area given on the left. Here, you can select any event that you wish to set as trigger from the dropdown options given under '**Select Trigger**'. For this flow, we will select '**New Lead**'. Next, provide a suitable name for this trigger (e.g., TriggerForNewLead).
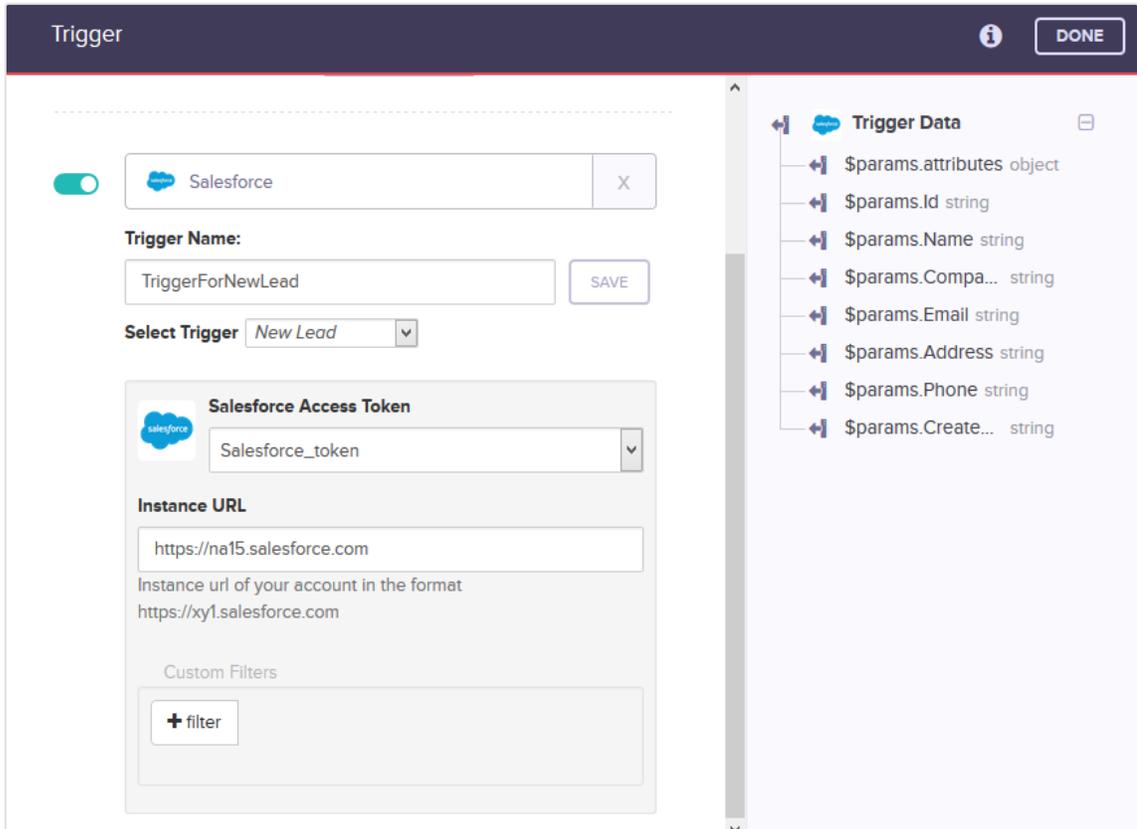
In order to authorize Built.io Flow to access your resources in Salesforce, it's important to establish a connection with your Salesforce account. To do this, select '**Add New**' under '**Salesforce Access Token**', and create a new authorization. You also have to provide the instance URL of your Salesforce account. The instance URL is the first part of the URL that you see in the browser's address bar after signing in to your Salesforce account (e.g., https://na15.salesforce.com).

Once you enter all these details, click on '**Save**', and then '**Done**' to return to Built.io Flow canvas. With this, you are done configuring the 'Salesforce New Lead' trigger. Let us now move to adding activities to your flow.

Step 3. Add Twilio 'Send SMS' activity

Built.io Flow provides several ready-to-use activities so that you can quickly integrate your favorite app/service with Built.io Flow. Among the list of activity categories, look for **Twilio**. From the list, drag and drop '**Send an SMS**' activity to your canvas anywhere between **'Start'** and **'Stop'.** This activity sends an instant SMS to the specified number.

Step 3.1. Connect Start with Twilio 'Send SMS'

To arrange the flow in a logical sequence, let us connect the start icon with the Twilio '**Send SMS**' activity. To do this, hover on the 'Start' icon. You will notice three smaller icons. Use the one located in the center ('**Connect Activity**' icon) to drag a connection from 'Start' to the 'Send SMS' activity.

Step 3.2. Configure Twilio Activity

To configure this activity, hover on it, and click on the top (**Settings**) icon.
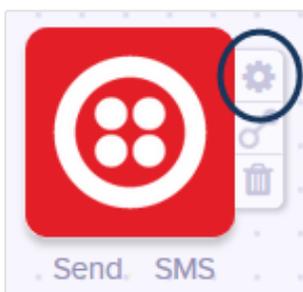
On the new window that appears, under Twilio Connection, select an appropriate connection for Twilio. If you haven't created any, select '**Add New**' to create one. The '**Account SID**' is like a username, whereas the '**Auth Token**' acts as password. As a Twilio user, you should already have these details.

Then, in the '**To number**' field, enter the phone number of the person you wish to send an SMS. Note that this number should also include the country code. In '**From number'**, enter your registered Twilio number.
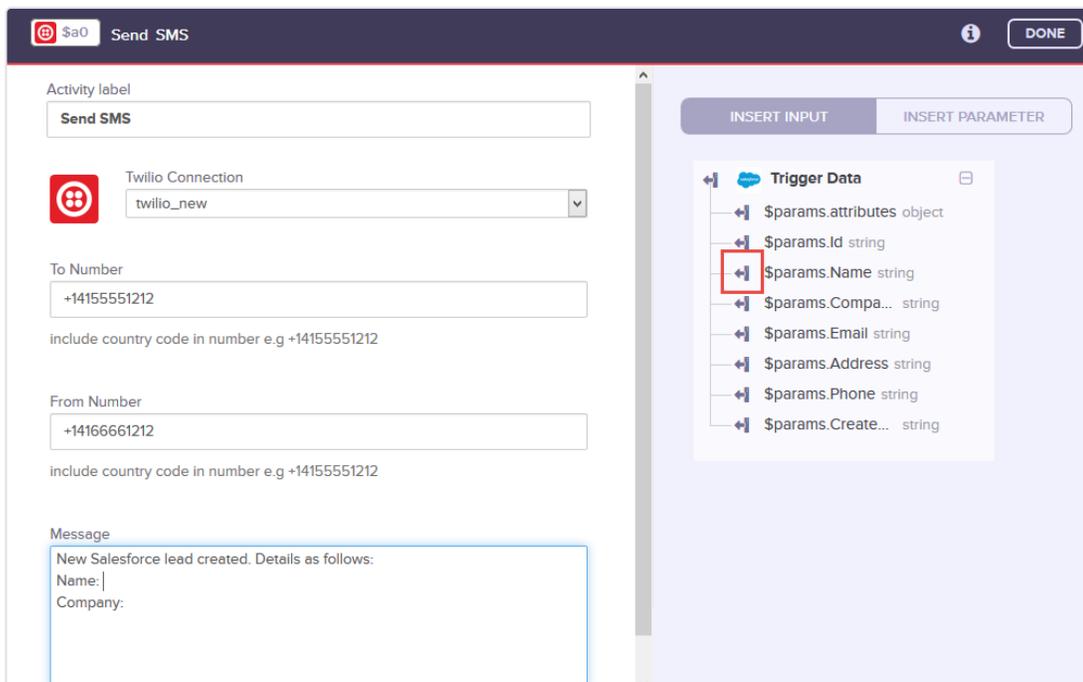
In the '**Message**' field, enter a short message that you wish to send to the recipient. You can also include the details of the Salesforce lead in this message by using the trigger outputs provided on the right under 'Insert Input'. For instance, to use the name of the lead in the message, click on the 'Insert' icon next to the 'Name' variable.

Once you are done with entering these details, click on 'Done' and return to the canvas.

Step 4. Add 'Wunderlist Create Task' activity

Let us add another activity 'Wunderlist Create Task', which will create a new task in the salesperson's Wunderlist account. To do this, drag and drop '**Create Task**' from the list on the right.

Step 4.1. Configure Wunderlist activity

Click on the settings icon to configure this activity, and create an access token for Wunderlist.

In Wunderlist, tasks are created under lists. Specify the ID of the list under which you wish to create this task in the '**List ID**' field. Provide a suitable title for this task. Remember that you can use the trigger output provided on the right as an input for this field (as shown in Step 3.1). Enter other details, such as ID of the assignee, due date for the task, and completion status.
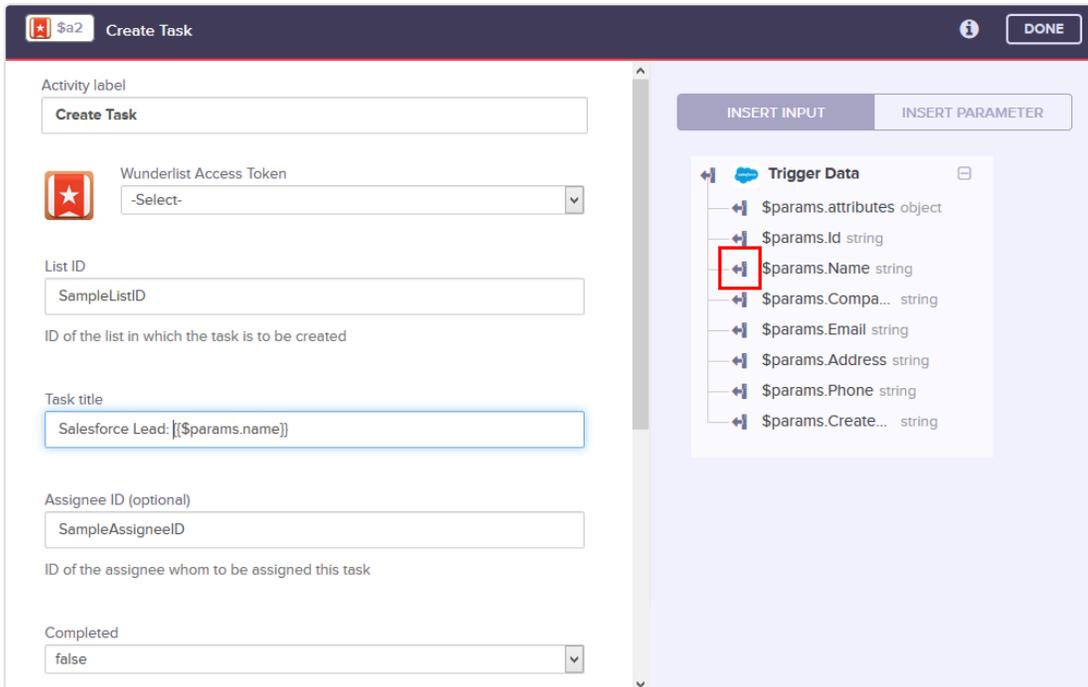
Step 5. Create Flow

It's now time to connect all these activities. To do this, hover on the 'Start' icon, and use the '**Connect Activity**' icon to drag a line from '**Start**' to the '**Twilio Send SMS**' activity. Similarly, connect all the icons in such a way that the flow looks like the one shown in the image below.
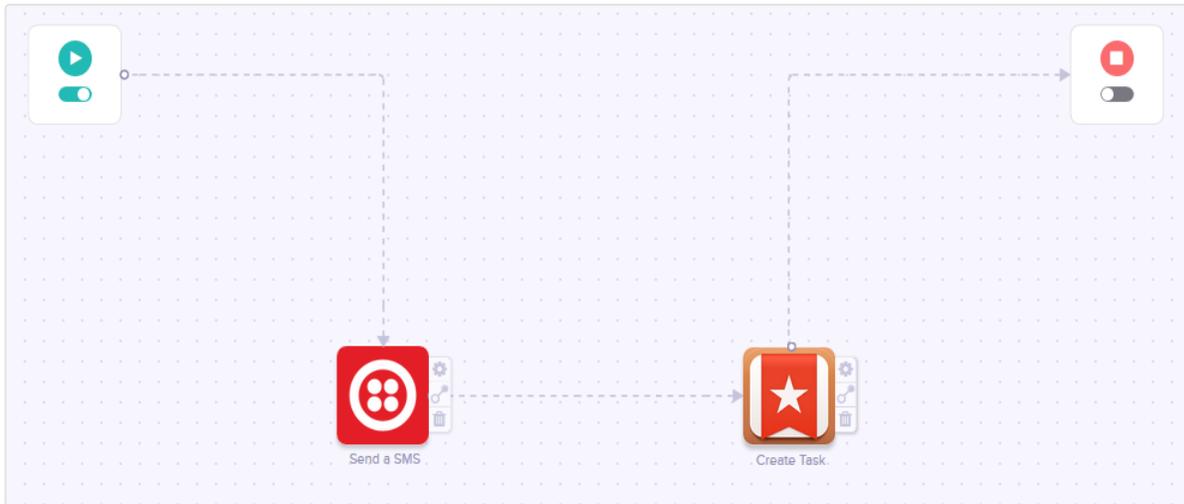
The flow is now connected from start to stop, with all the necessary activities in between. Click on the '**Save**' button located on top right corner of the page to save the flow. Now, whenever you (or your team members) create a new lead in Salesforce, the details of this lead will be sent to the specified salesperson. At the same time, a new task will also be created in Wunderlist for the salesperson to begin the follow-up process.

By creating this flow, you have automated the task of notifying your team members about a new lead in Salesforce and assigning the lead to them. This was a simple Salesforce example. Using Built.io Flow, you can create much more sophisticated flows just as easily to automate all your business needs.

Note: The steps in the above flow differ slightly if you are using a different trigger or activity.

Contact

If you have any questions about the way Salesforce Integration works, or want us to add any custom third-party service activity, send us an email at support-flow@built.io.

Learn more about what Built.io Flow can do for your business by visiting our website: flow.built.io.