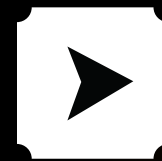


# SALESFORCE AUTOMATION VIA MAKE.COM



salesforce



# Introduction

We have hands-on experience designing automation workflows in Make.com integrated with Salesforce. Our work includes building scenarios like syncing Salesforce Leads and Contacts with external platforms (Google Sheets, HubSpot, Salesforce), and sending real-time email notifications. These automations reduce manual data entry, improve reporting visibility, and ensure teams always work on updated information.



# Workflow Section

## Make.com

The below workflows demonstrate practical use cases we executed on Salesforce Sandbox, showcasing our ability to design, test, and deploy client-ready automation.

### Workflow 1: Lead → Email Alert → Google Sheet Log

**Platform:** Make.com

**Purpose / Client Scenario:** Notify team via email and log all new Salesforce leads in Google Sheets.



Step	Action / Module	Description
1	Salesforce Trigger	Watch Leads
2	Email Action	Send notification
3	Google Sheet Action	Append row for logging
4	Run History	Confirm scenario executed successfully

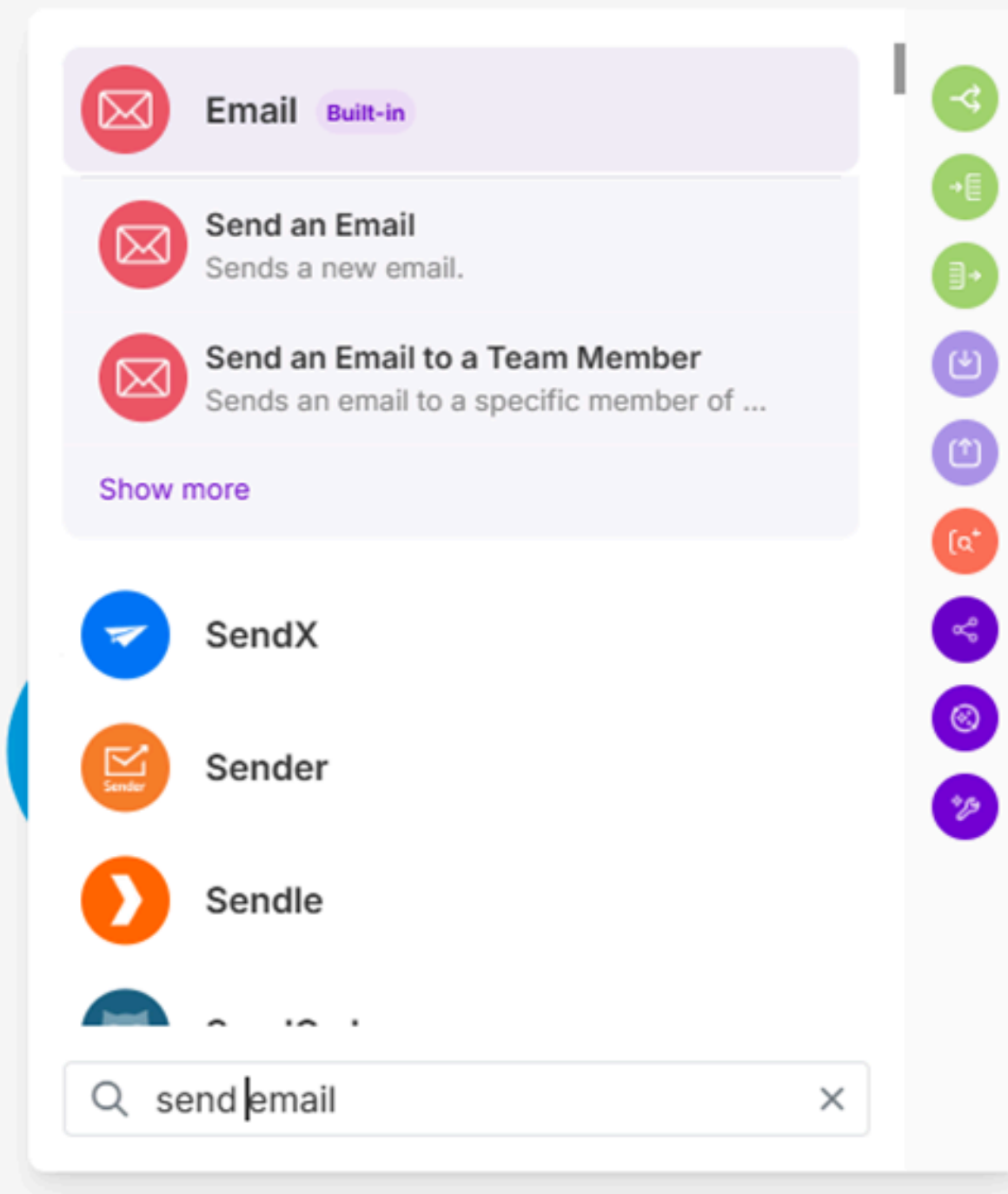
**Outcome / Benefit:** Immediate notifications, automatic logging for reporting.








4




 Sign in with Google



# Sign in to Make



Google will allow Make to access this info about you

 n [redacted]  
Email address

Review Make's [Privacy Policy](#) and [Terms of Service](#) to understand how Make will process and protect your data.

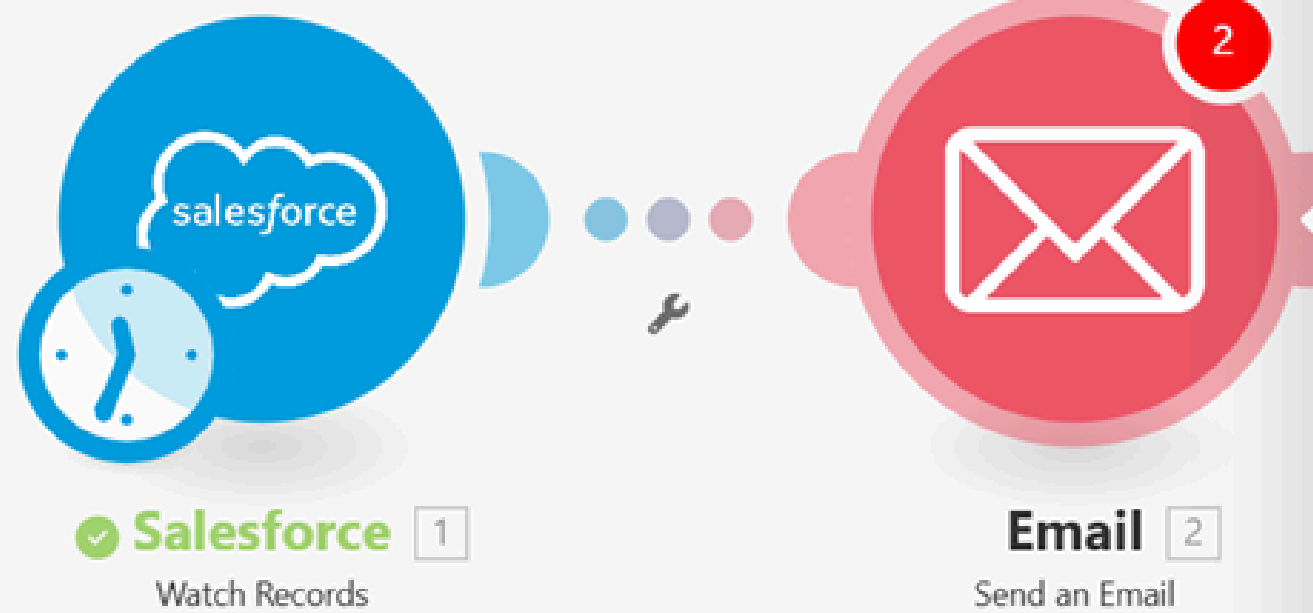
To make changes at any time, go to your [Google Account](#).

[Learn more about Sign in with Google.](#)

Cancel

Continue






 Run once |  Every 15 minutes |   >

Email

automatically.

Connection \*

 My Google Restricted conn... 

Add

For more information on how to create a connection to Email, see the [online Help](#).

Folder \*

Sent Mail

To \*

Email address 1 \*

no...

+ Add a recipient

Enter a recipient email address.

Subject

New Salesforce Lead: 

Name

Content Type \*

Plaintext

A | Content

1. Lead ID

1. Last Name

1. Email

Attachments

+ Add an attachment

Advanced settings

Cancel

Save

AI

BETA

5

us2.make.com/1290937/scenarios/3013017/edit

Integration Salesforce

**Salesforce** 1  
Watch Records

**Email** 2  
Send an Email

**Google Sheets** 3  
Add a Row

Run once | Every 15 minutes

**Google Sheets**

**Connection \***  
My Google connection Add

For more information on how to create a connection to Google Sheets, see the [online Help](#).

**Search Method \***  
Search by path

**Drive \***  
My Drive

**Spreadsheet ID \***  
/ lead\_Automation

**Sheet Name \***  
Sheet1

**Table contains headers \*** Refresh  
Yes

**Values**

☒ A

☒ B

Advanced settings Cancel Save

Google Sheets

Sheet1

☒ Table contains headers\*

Refresh

Yes

☒ Values

☒ A

1. Lead ID

☒ B

1. Last Name

☒ C

1. Email

☒ D

2. Message ID

☒ A | E



Google Sheets

Sheet1

☒ Table contains headers\*

Refresh

Yes

☒ Values

☒ A

1. Lead ID

☒ B

1. Last Name

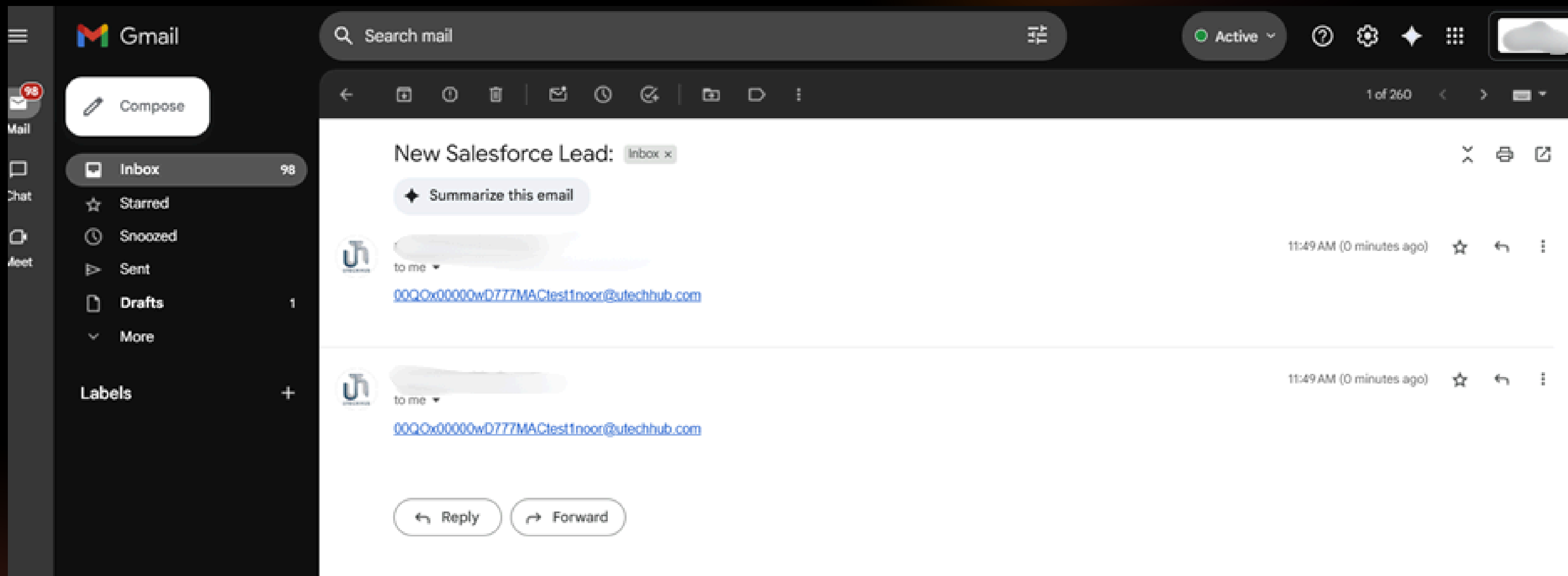
☒ C

1. Email

☒ D

2. Message ID

☒ A | E





lead\_Automation



File Edit View Insert Format Data Tools Extensions Help



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123

Defaul...



10



B

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C1



fx

Email

	A	B	C1	C	D	E	F	G	H
1	ID	Last Name	Email						
2	00QOx00000wD	test1							
3									
4									
5									
6									



# Skills / Learning Demonstrated

- Salesforce workflow automation & integration
- Multi-step workflow creation in n8n and Make.com
- Data mapping between systems
- Error handling and testing workflows
- API integrations with CRM, forms, messaging, and storage apps

# CONCLUSION

**THESE WORKFLOWS DEMONSTRATE HANDS-ON AUTOMATION SKILLS FOR SALESFORCE AND CONNECTED APPS. BENEFITS FOR CLIENTS:**

- **SAVES TIME ON REPETITIVE TASKS**
  - **REDUCES ERRORS**
  - **IMPROVES TEAM RESPONSIVENESS**
  - **STREAMLINES REPORTING AND NOTIFICATIONS**
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