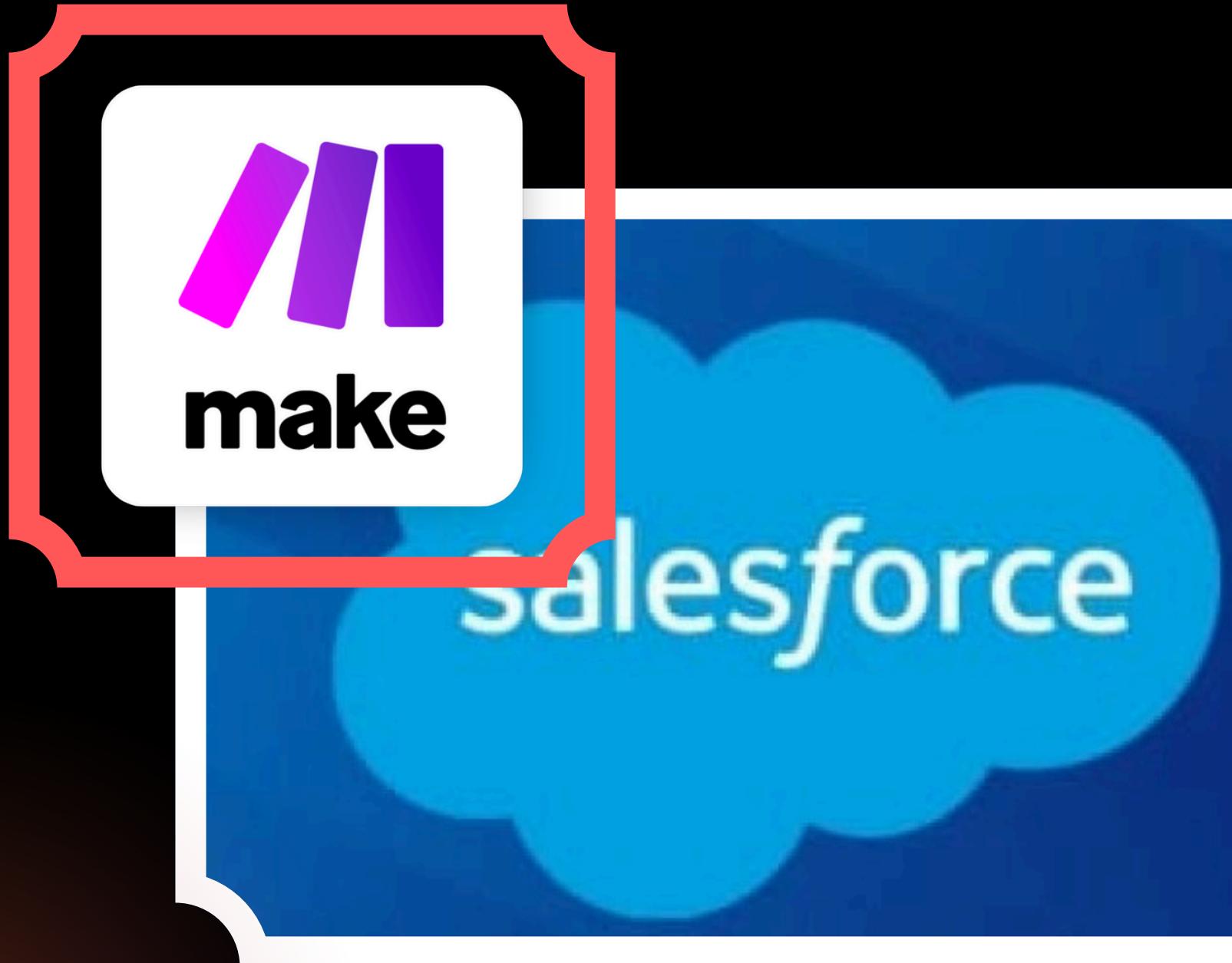
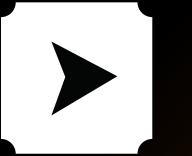


SALESFORCE AUTOMATION VIA MAKE.COM



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.

The screenshot shows a software interface with a purple sidebar on the left containing various icons. The main area features a 'Salesforce' module configuration dialog.

Salesforce configuration dialog:

- My Salesforce connection (...** (dropdown menu) **Add**
- Watch Records** (selected):
 - By Created Time
- Type**: Lead
- Limit**: 2
- Information**:
 - The maximum number of results to be worked with during one execution cycle.
 - The overall limit imposed by Salesforce API is 2000 records. If you need to work with older records, please use Search Records (SOQL) module and its Filters.
- Buttons**: **Cancel** **Save**

Salesforce module in the main area:

- Watch Records** (1)
- Run once** **Every 15 minutes**
- Execution history: 0

Salesforce

Summary

1 operation | 1 credit used

Initialization

Operation 1

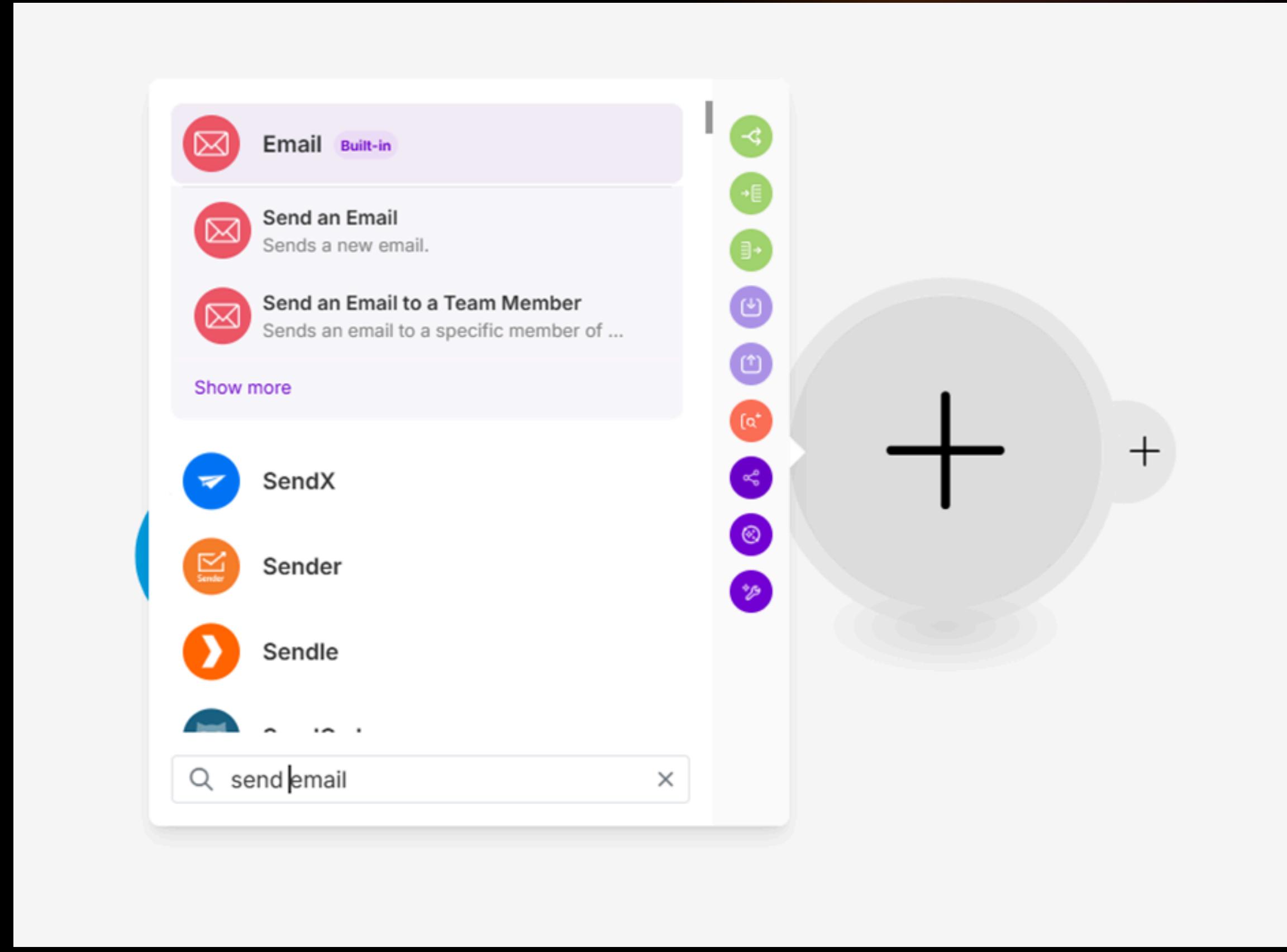
OUTPUT

Bundle 1: (Collection)

- Lead ID: 00Q0x00000wD4h7MAC
- Deleted: false
- Master Record ID: empty
- Last Name: test0
- First Name: empty
- Salutation: Mr.
- Middle Name: empty
- Suffix: empty
- Full Name: test0
- Record Type ID: 012Pg000002OUrplAG
- Title: empty
- Company: make.com
- Street: empty
- City: empty
- State/Province: empty
- Zip/Postal Code: empty
- Country: United States
- State/Province Code: empty
- Country Code: US
- Latitude: empty
- Longitude: empty
- Geocode Accuracy: empty

Address: (Collection)

- Phone: empty
- Mobile Phone: empty
- Email: empty
- Website: empty
- Photo URL: /services/images/photo/00Q0x00000wD4h7MAC
- Lead Source: empty



 Sign in with Google



Sign in to Make



Google will allow Make to access this info about you

 n [REDACTED]

Email address

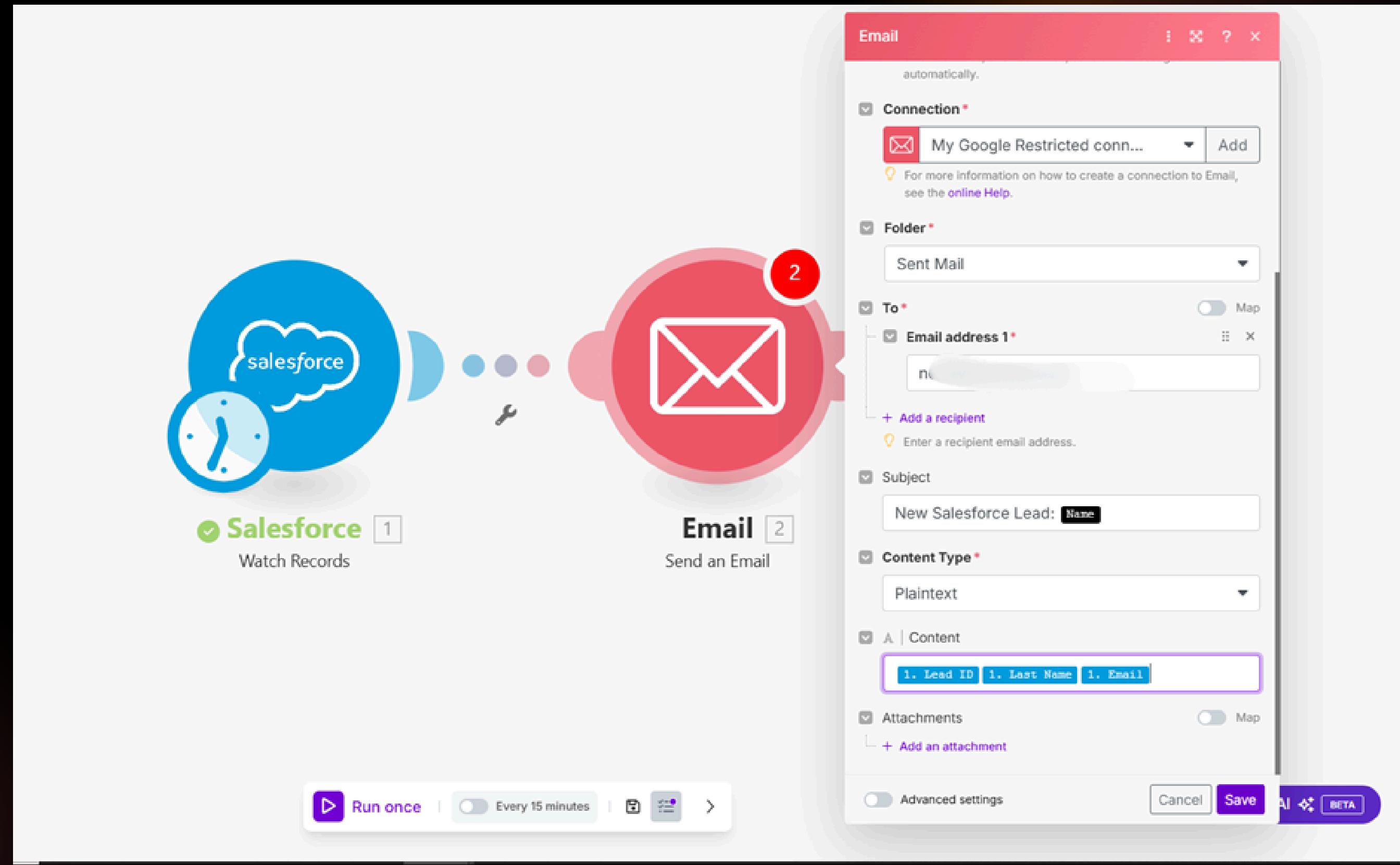
Review Make's [Privacy Policy](#) and [Terms of Service](#) to understand how Make will process and protect your data.

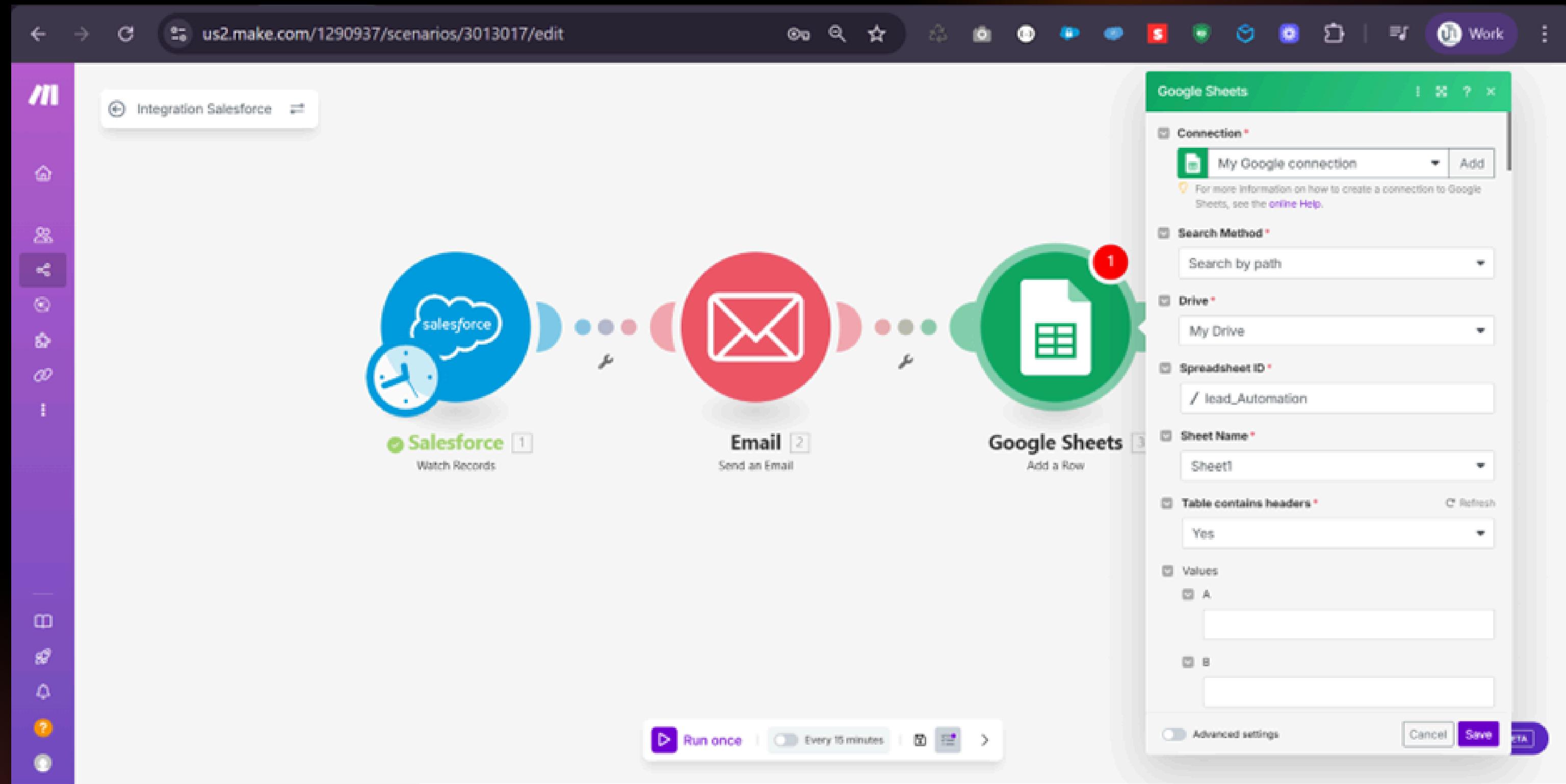
To make changes at any time, go to your [Google Account](#).

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

[Cancel](#)

[Continue](#)





Google Sheets

Sheet1

Table contains headers*

Refresh

Yes

Values

A

1. Lead ID

B

1. Last Name

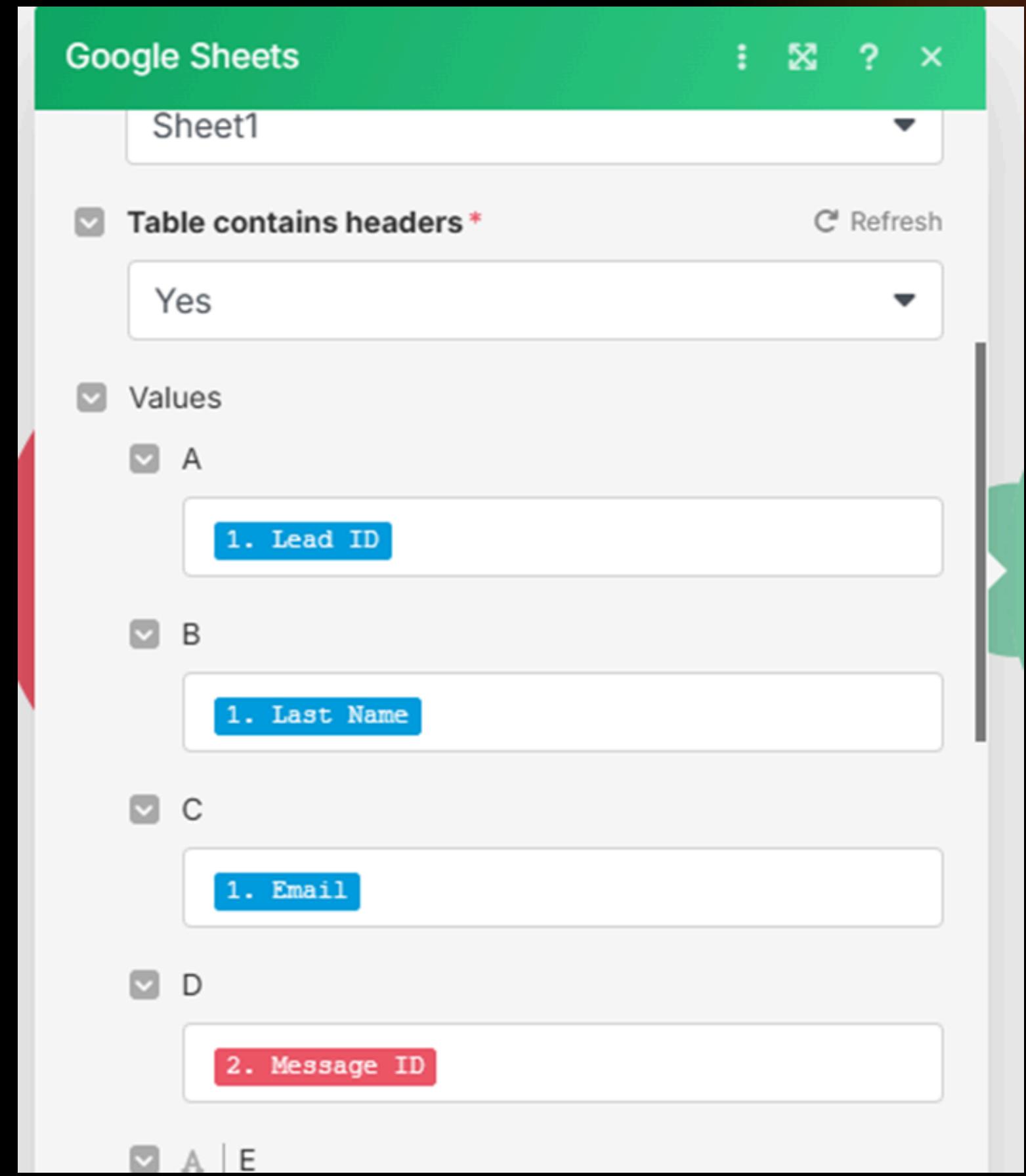
C

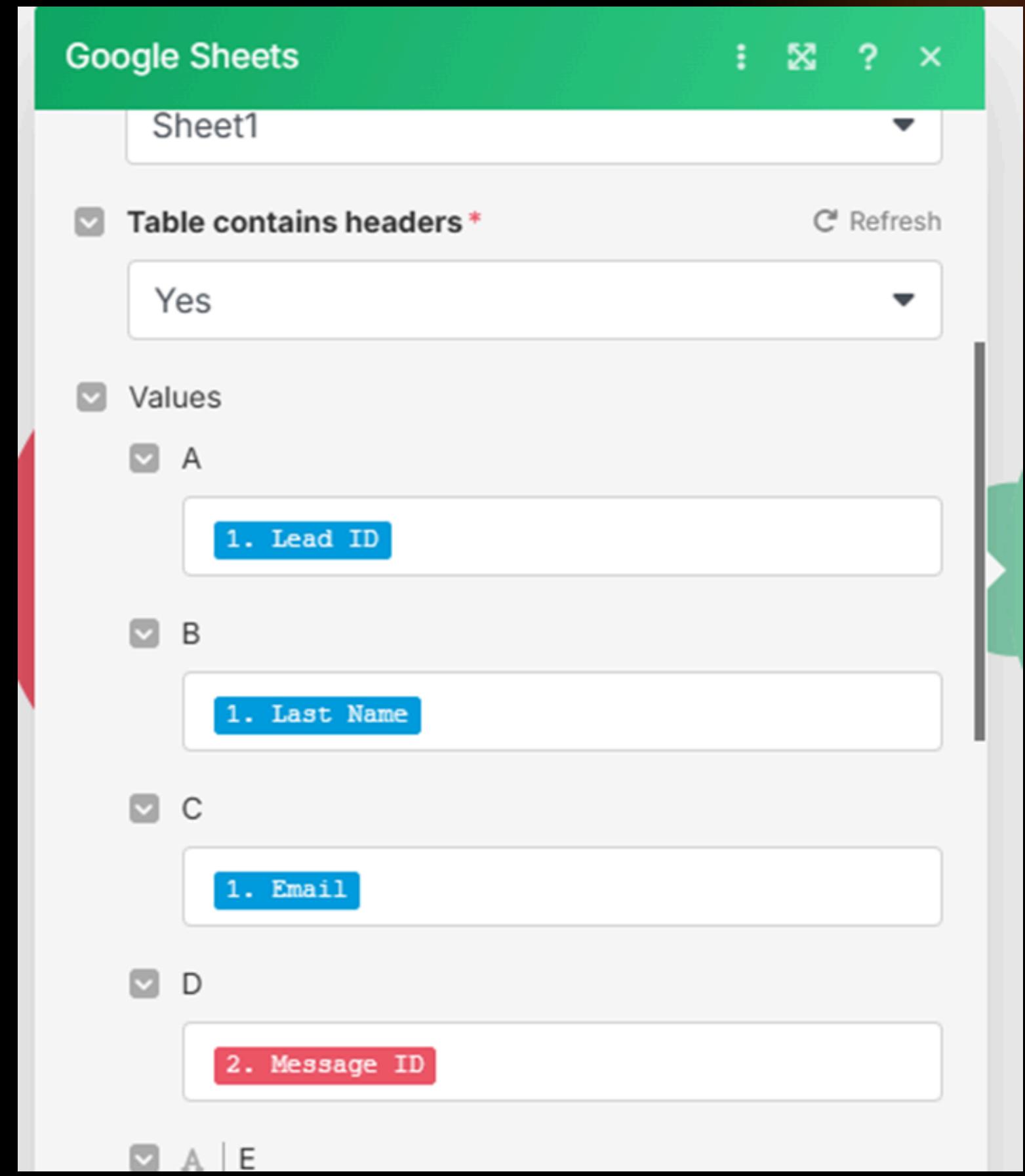
1. Email

D

2. Message ID

A | E





Gmail

Compose

Inbox 98

Starred

Snoozed

Sent

Drafts

More

Labels

Search mail

Active

1 of 260

New Salesforce Lead: [Inbox](#)

Summarize this email

11:49 AM (0 minutes ago)

00QOx00000wD777MACTest1noor@utechhub.com

11:49 AM (0 minutes ago)

00QOx00000wD777MACTest1noor@utechhub.com

Reply

Forward

The screenshot shows the Gmail inbox interface. The left sidebar includes 'Compose', 'Inbox (98)', 'Starred', 'Snoozed', 'Sent', 'Drafts', 'More', and 'Labels'. The main area displays two new emails from 'New Salesforce Lead'. The first email is from '00QOx00000wD777MACTest1noor@utechhub.com' at 11:49 AM (0 minutes ago). The second email is from the same sender at the same time. Both emails have a 'Reply' and 'Forward' button at the bottom.

lead_Automation

File Edit View Insert Format Data Tools Extensions Help

100% | \$ % .0 .00 123 | Default... | - 10 + | B I C A |

C1 | fx Email

	A	B	C1	C	D	E	F	G	H
1	ID	Last Name	Email						
2	00Q0x00000wD	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**
