

Automated Customer Communication for Order Confirmations

Introduction

In an effort to streamline customer communication and reduce manual workload, our team implemented an automated email system for sending order confirmation PDFs. The goal was to ensure accuracy, brand consistency, and timely notifications, while minimizing errors in recipient details. By leveraging dynamic data from Quotes and Orders, and using standardized email templates, we achieved a fully automated solution that enhances efficiency and improves the customer experience.

Client Overview

Salesforce Products Used

Salesforce
Sales Cloud

Apex

Salesforce
CPQ

Lightning Email
Templates

Visualforce /
LWC PDF
Generator

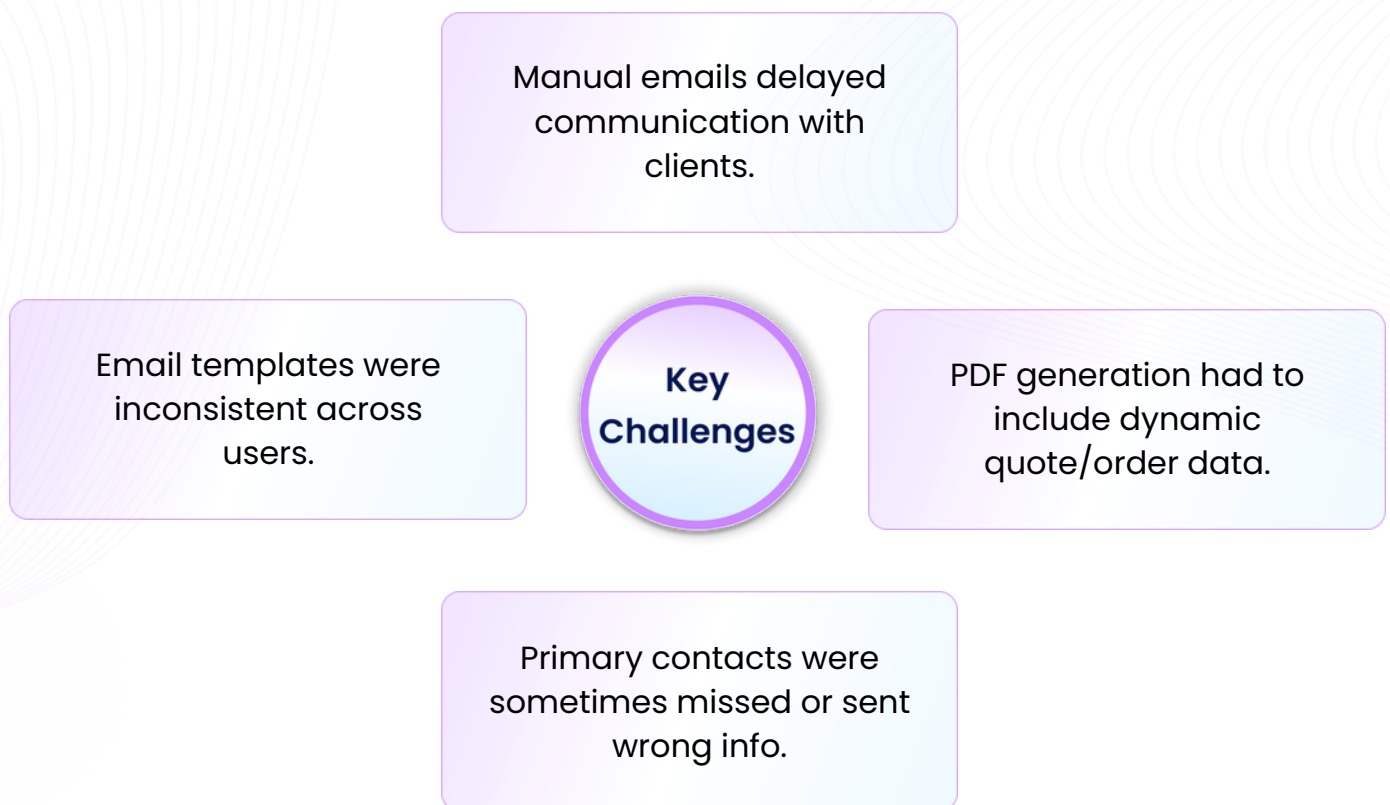
Email
Services

Business Requirements

Client needed to automate the communication process after an order is confirmed. Specifically:

- When a **Quote is created** and status is **Customer Approved** and a corresponding **Order is created** from that quote, then the system must **automatically send an email** to the **Primary Contact** with a **PDF attachment** that includes:
 - Event Start Date
 - Event End Date
 - Delivery Date
 - Pickup Date
 - Product Details (Name, Qty, Price)
 - Terms and Conditions

Challenges Faced



Solution Architecture

Trigger-Based Automation

- Custom Apex trigger built on the Order object to initiate automation.

PDF Generation

- Visualforce PDF or LWC-based PDF rendering via Apex.
- Includes dynamic fields like Event Dates, Delivery & Pickup Dates, Product Line Items with Quantity and Price.
- Footer section pulls Terms and Conditions dynamically using Custom Metadata.

Email Template

- Lightning Email Template designed with merge fields from both Order and Quote for personalization.

Primary Contact Mapping

- Logic automatically identifies and fetches the Primary Contact from the associated Quote.

Email Send Logic

- Apex logic handles email dispatch with the generated PDF attachment.

Business Outcome

Objectives

Reduce manual email effort
Ensure PDF accuracy
Timely notification to customer
Standardize email content and branding
Minimize errors in recipient info

Outcome Achieved

100% automated email with attachment
Dynamic data from Quote and Order
Instant email on Order creation
Unified template with logo and footer
Auto fetch Primary Contact