

Email Automation with updated Documents to Opportunity Related Contact

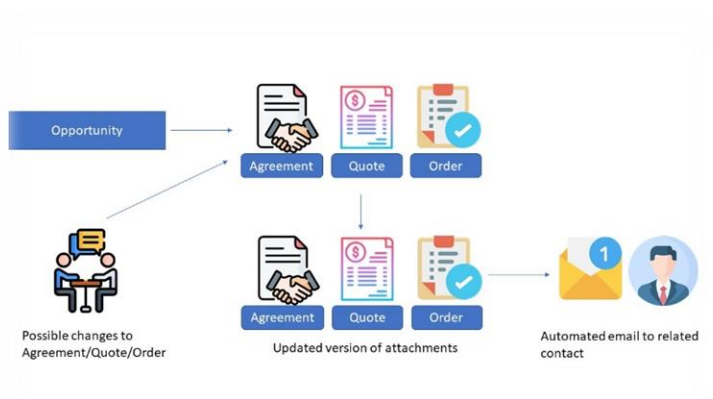
Scenario

Let us consider we have an agreement document as an attachment in the opportunity record, when a quote or order is created from that opportunity then the agreement should be attached to the newly created quote or order. When there is any change in the version of the attachments, send an email with new version document to the related contact of respective opportunity, quote and order records.

Solution overview

1. Customer and Sales representative finalize and make an agreement and generate quote and order.
2. Customer changes mind and makes changes according to either agreement or quote.
3. The automation solution which includes triggers on Quote, Order and content version identifies the new version of the documents and sends an email with the updated documents to the opportunity related contact.

Process Overview



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