

Use Case

User Story

As a Sales Manager, my team has issues following up with clients because of the lack of email addresses on Contacts in Salesforce.

Acceptance Criteria

That Sales User has all the information needed to contact clients, including phone and email addresses.

Problem

After researching, the Salesforce Admin noticed that many of the email address fields were blank on the Contact Records. The admin thought about making it a required field, but after talking to the Sales Manager, who was against making it a required field, primarily because he was afraid that if a Sales Rep did not have the email address that was required, they would just not create a contact at all.

Solution

The Salesforce Admin created a Record-Triggered Flow that will send a Chatter Message to the Record Owner if the email field was left blank when creating a New Contact Record was saved.

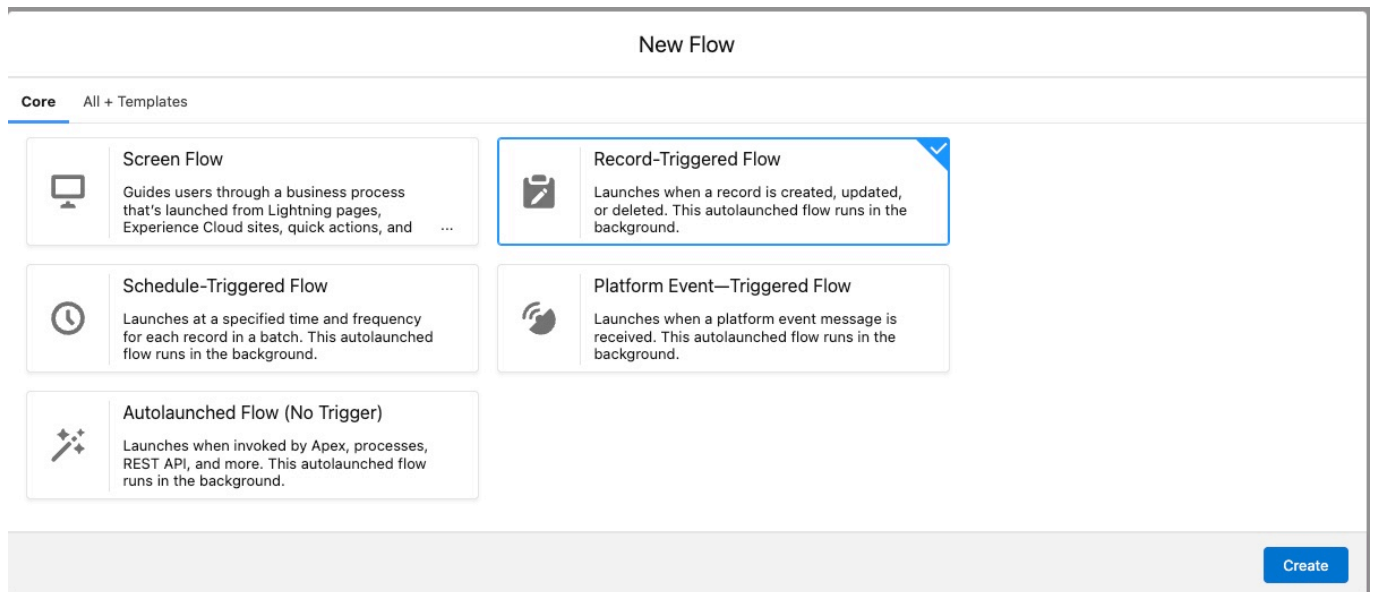
How to Create a Record-Triggered Flow in Salesforce

Open Flow Builder

- **Setup**
- Enter **Flows** in the Quick Find box
- Click on **Flows**
- Click the **New Flow Button**

We want a Flow automated behind the scenes triggered when the Contact Record is saved. In this case, what we want is a Record-Triggered Flow.

Master the Art of Active Listening with These 5 Tips



New Flow Screen – Record-Triggered Flow Selected.

Configure Start Criteria for the Flow

This brings up a screen to configure what triggers the Flow to execute. You will determine what Object the Flow runs on and what causes the Flow to start. Also, the entry conditions for this Flow will be set. Lastly, you will determine if the Flow runs before or after the save.

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Configure Start

Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object
Contact Step 1

Configure Trigger

* Trigger the Flow When:
☒ A record is created Step 2
☐ A record is updated
☐ A record is created or updated
☐ A record is deleted

Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements
All Conditions Are Met (AND) New Formulas for Conditions ⓘ

Field: **Email** Operator: **Is Null** Value: **{!\$GlobalConstant.True}** Step 3

+ Add Condition

* Optimize the Flow for:

Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records Step 4
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Cancel Done

Configure Your Record-Triggered Flow.

Step 1 - Choose the Object that Flow will be run on. In this case, it is the **Contact** Object.

Step 2 - Configure the Trigger. This Flow triggers when a **record is created**.

Step 3 - Determine the entry conditions. In this example, we want it to fire when **All Conditions Are Met (AND)**.

- Field: **Email**
- Operator: **Is Null**
- Value: **{!\$GlobalConstant.True}**

Step 4 - This is when we choose if the Flow runs before or after Save is clicked. In this case,

we want it to run after the save. So we choose ***Actions and Related Records***.

Click ***Done***

Add Some Action to our Flow

The Action screen allows us to set the actions the Flow will perform. On this screen, we will

- Choose the Actions to perform
- Label the Actions
- Create an API Name
- Set the input Values and create the Chatter Message

Add an Action

- Click on the ***Plus Sign*** under Start
- Scroll down to the ***Interaction Section***
- Click on ***Action***

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New Action

Filter By
Category ▼

Price books
Feed Item
Chatbots
Case
Account
Contact
Event
Lead
Note
Opportunity
Messaging

Step 1

Action
Post to Chatter

Use values from earlier in the flow to set the inputs for the "Post to Chatter" core action. To use its outputs later in the flow, store them in variables.

Step 2

* Label
No Email on Contact Message

* API Name
No_Email_on_Contact_Message

Step 2

Description
Sends a Chatter message to the Record Owner when a Contact was saved with a blank email address.

Set Input Values

A₃ * Message
Enter value or search resources... 🔍

Step 4

+ New Resource

Global Constants

A₃ \$GlobalConstant.EmptyString
Equivalent to empty string (not null)

A₃ \$GlobalConstant.False
Equivalent to false, unchecked, or no

⋮ \$GlobalConstant.True
Equivalent to true, checked, or yes

Global Variables

⋮ \$Api >

⋮ \$Flow >

⋮ \$Label >

> Ad ⋮ \$Organization >

⋮ \$Profile >

⋮ \$Record >

Don't Include

Don't Include

Don't Include

Cancel Done

Action Screen for a Record-Triggered Flow

Step 1 - Choose the action we want to perform. On the left-hand side of the **Filter by** list, make sure **Category** is selected, then scroll down to **Messaging**.

Step 2 - Label: **No Email On Contact Chatter Message**

Step 3 - API Name: **No_Email_On_Contact_Chatter_Message**

Step 4 - Assign the Input Variable. In this case, it will be the message we want to send in a Chatter Post, and we need to create it. Click + **New Resource**

Creating the Chatter Message

After you Create + New Resource, you will be brought to the New Resource Screen. This is where you create the message you want to send in the Chatter message.

The screenshot shows the 'New Resource' form in Salesforce. The form is titled 'New Resource' and has four main sections, each with a step number:

- Step 1:** Resource Type. A dropdown menu is set to 'Text Template'.
- Step 2:** API Name. A text field contains 'No_Email_Chatter_Message'.
- Step 3:** Description. A text area contains 'Send a Chatter message to the Record Owner that lets them know that there is no email address on the contact record.'
- Step 4:** Body. A rich text editor contains the text: '{!\$User.FirstName}, The Contact that you just created, {!\$Record.FirstName} {!\$Record.LastName}, does not have an email address associated with it. Please add an email address.'

At the bottom of the form, there are buttons for 'Cancel' and 'Done'.

Create the New Resource Chatter Message

Step 1 - Choose Resource Type: **Text Template**

Step 2 - API Name: **No_Email_Chatter_Message**

Step 3 - Description: **Send a Chatter message to the Record Owner that lets them know that no email address is listed on the Contact Record.**

Step 4: Body: This is the body of your message. Here you can use the resource box to personalize the Chatter message to the Record Owner and the Record Information. Just click in the **Insert a Resource** box and fill out the information you want to use. In this example, we use Record Owner First Name and the First and Last Name on the Contact record.

Chatter_Post_No_Email

Chatter message letting the Record Owner know that there is no email filled out in the email field on the Contact that they just created.

* Body

Insert a resource... View as Rich Text ▼

{!\$User.FirstName}, the Contact that you just created, {!\$Record.FirstName} {!\$Record.LastName}, did not have an email address provided. Please add one.

Thank you

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Cancel Done

Insert Record information into the Chatter Message

The resource box lets you choose `{!$User.FirstName}` and `{!$Record.FirstName}` `{!$Record.LastName}` to personalize the Chatter Message.

After you have crafted the perfect Chatter Message. Click **Done**

Save and Activate the Flow

You have created the Flow. All you need to do now is **Save** and **Activate** your Flow.

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* Flow Label

No Email Record Triggered Flow **Step 1**

* Flow API Name

No_Email_Record_Triggered_Flow **Step 2**

Description

A Record Trigger flow that sends a Chatter Post to the Record Owner if no email address is provided on the Contact Record.

Step 3

Show Advanced

Cancel Save

Save Your Flow

Here you fill in the information you want to use to Save your Flow.

Note: Do not forget to **Active** your Flow