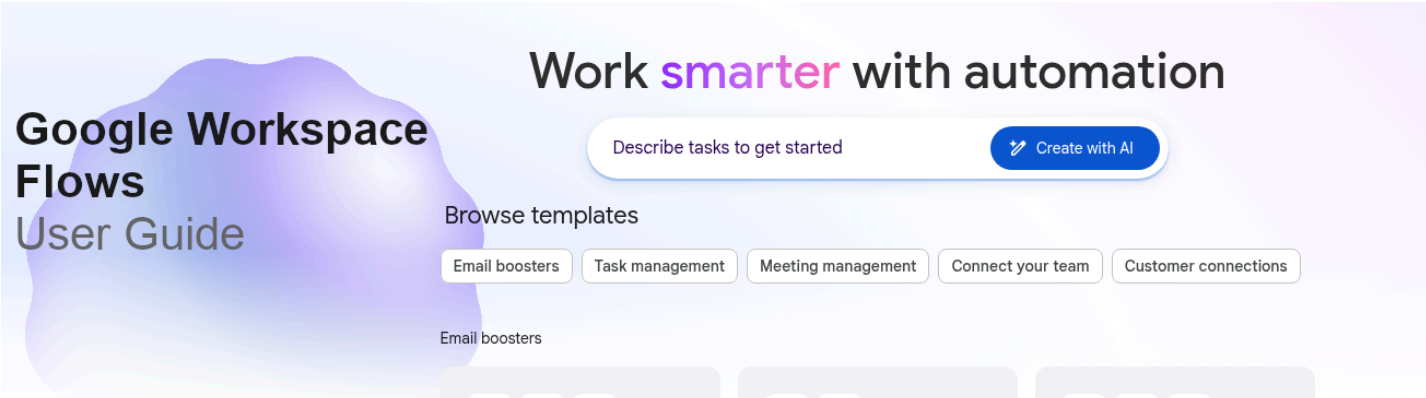

Google Workspace Flows (Early Access)

User Guide

This comprehensive user guide provides an in-depth look into Google Workspace Flows, a powerful tool designed to streamline your daily tasks and enhance collaboration. Whether you're a new user or looking to optimise your existing workflows, this guide will walk you through the essential features and best practices to maximise your productivity.

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Introduction to Google Workspace Flows

Google Workspace Flows empowers users to automate repetitive tasks and connect various Google Workspace applications seamlessly. By defining triggers and actions, you can create automated sequences that save time, reduce manual effort, and improve consistency in your operations.

Key benefits include:

- **Increased Efficiency:** Automate routine tasks, freeing up time for more strategic work.
- **Enhanced Collaboration:** Streamline communication and information sharing across teams.
- **Improved Accuracy:** Minimise human error by automating data transfers and updates.
- **Customisable Workflows:** Tailor flows to meet your specific business needs.

Getting Started

To begin using Google Workspace Flows, ensure you have an active Google Workspace account.

Here are the initial steps:

- **Accessing Flows:** Google Workspace Flows can be accessed through your Google Workspace dashboard or directly via a dedicated link.
- **Permissions:** Verify that you have the necessary permissions to create and manage flows within your organisation. If you encounter any issues, contact your Workspace administrator.
- **Understanding the Interface:** Familiarise yourself with the main dashboard, which typically includes sections for creating new flows, viewing existing flows, and accessing templates.

Creating Your First Flow

Creating a flow involves defining a trigger and one or more actions.
To select a trigger:

1. Click on the "Create New Flow" button.
2. Browse the available trigger options and select the one that suits your needs.
3. Configure the trigger by specifying any necessary details (e.g., email subject, document name, calendar).

Step 1: Choose a Trigger

A trigger is an event that initiates your flow. The current available triggers are:

- On a schedule
    - Triggers at a predetermined time, once or repeated, settings:
        - Set date
        - Set time
        - Repeating frequency:
            - None
            - Hourly
            - Daily
            - Weekly
            - Monthly
            - Annually
        - Time zone
- Gmail - When I get an email
    - Triggers on incoming email with filters similar to your Gmail inbox search filters, settings:
        - From
        - To

        - Body has the words
        - Body doesn’t have (the words)
        - Subject has
        - Size (greater or less than)
        - Email size (None selected, 1MB, 2MB, 5MB, 10MB)
        - Has attachment
        - Gmail Label (No label, Important, Personal, Promotional, Purchases)
        - Start from emails sent by flows
            - To avoid the situation where a workflow starts itself or others in a continuous loop, starters are set to ignore messages sent by flows by default. For example, if you have a flow that starts when someone posts a message in a space and it posts to that same space, this setting prevents the flow from starting again based on that message.
            - However, in some cases you might want a flow to start based on messages that are sent by other flows. In that case, check the box so that the flow considers these messages, too.
- **Chat - When someone joins a space**
    - Triggers when someone joins specified spaces, settings:
        - Add space or spaces in the field, alternatively leave empty to include all spaces you are a member of
- **Chat - When someone posts in a space**
    - Triggers when someone posts in specified spaces, settings:
        - Add space or spaces in the field, alternatively leave empty to include all spaces you are a member of
        - Include or exclude messages posted by flows
- **Chat - When I'm mentioned in spaces**
    - Triggers when someone mentions you in specified spaces, settings:
        - Add space or spaces in the field, alternatively leave empty to include all spaces you are a member of
        - Include or exclude messages posted by flows
- **Chat - When an emoji reaction is added**
    - Triggers when someone reacts with an emoji in specified spaces, settings:
        - Specify which emojis to look for or leave empty for all emojis
        - Add space or spaces in the field, alternatively leave empty to include all spaces you are a member of
        - Specify people who add the emoji, alternatively leave empty to include all people
- **Drive - When an item is added to a folder**
    - Triggers when someone adds an item to a folder, settings:
        - Specify folder with the field selector
- **Drive - When a file is edited**
    - Triggers when someone edits a specific file, settings:
        - Specify file with the field selector
- **Drive - When an item in a folder is edited**
    - Triggers when someone edits any item in a folder, settings:

        - Specify folder with the field selector
- **Calendar - Based on a meeting**
    - Triggers in relation to a set meeting or series of meetings, settings:
        - Specify meeting to trigger for in the field selector, to trigger for all meetings, select the list item “Every meeting”
            - If the meeting selected is a repeating meeting, the flow will launch for each meeting
        - Set the time offset in minutes, hours or days
        - Choose if the time offset is for before or after the meeting
- **Forms - When a form response comes in**
    - Triggers when a form has been submitted, settings:
        - Choose form with the field selector
        - Decide if the flow should launch also for edited form responses

Step 2: Define Actions

Actions are the tasks that Google Workspace Flows performs once the trigger is activated. You can add multiple actions to a single flow.

To add an action:

1. After configuring your trigger, click "Add Action."
2. Choose the desired action from the list of available options.
3. Configure the action by providing details such as recipients, document content, or spreadsheet values. You can often use data from the trigger event within your actions.

Available actions:

Gemini

- Ask Gemini
    - Generate text to add in another step as a **variable**.
        - Enter a prompt. Prompts can be up to 1000 words. Only links to Drive items are supported.
            - Add variables in the prompt by clicking **+ Variables** selector
        - Choose source base between:
            - Use any Workspace content you can access and the web as sources
            - Prioritise the web as a source
    - Variable name: **Content created by Gemini**
- Ask a Gem
    - Have a Gem, a specialised AI, draft replies, summarize text, and more. Give the Gem context from earlier steps with **variables**.
        - Select a Gem (links back to your Gems available to your account)
        - Enter a prompt. Prompts can be up to 1000 words. Only links to Drive items are supported.
            - Add variables in the prompt by clicking **+ Variables** selector
        - Choose source base between:
            - Use any Workspace content you can access and the web as sources
            - Prioritise the web as a source

        - Variable name: **Content created by a Gem**

[Experimental] Use Gemini to...

- Recap unread messages
    - Have Gemini summarise important unread message threads, then add the summary to a step as a **variable** to share it
        - Message time frame, select between
            - Today
            - Yesterday
            - Last 7 days
            - Last 30 days
        - Enter a prompt: Describe the message you want Gemini to summarise and what to always include, length, and format. Up to 50 messages will be included. Prompts can be up to 1000 words. Only links to Drive items are supported.
    - Variable name: **Summary of unread emails**
- Extract
    - Have Gemini extract information, such as action items, urgency, or custom content
        - Content to analyze
            - Add variables from previous steps, or enter text or a URL
                - Add variables in the field by clicking **+ Variables** selector
        - What to extract
            - Select predefined and custom content for Gemini to find
                - Add variables in the field by clicking **+ Variables** selector
            - Custom content name
                - Give this piece of data a label, ex Invoice Number
            - Description for Gemini
                - Where this is found
- Decide
    - Have Gemini report if your conditions are true or false
        - Enter a Prompt or select on of the suggested outcomes (Is urgent, Requires response, Is overdue)
            - Add variables in the field by clicking **+ Variables** selector
    - How Decide works
        - After Decide, use a Check if step to set which actions to take based on the result. For example, star an email only if it's urgent. If Gemini doesn't have enough information to decide, it defaults to false.
- Summarise
    - Use this step to have Gemini summarise content
        - Select what to summarise:
            - An email thread
                - Select email thread
                    - Add variables in the field by clicking **+ Variables** selector
                - Enter a prompt with instructions such as what to always include in the summary, length or tone. Prompts can be up to

  1000 words. Only links to Drive items are supported.
    - Add variables in the field by clicking **+ Variables** selector
- The content of a doc
  - Select file with the field selector
  - Enter a prompt with instructions such as what to always include in the summary, length or tone. Prompts can be up to 1000 words. Only links to Drive items are supported.
    - Add variables in the field by clicking **+ Variables** selector
- Meeting notes
  - Enter the link to the meeting notes
    - Add variables in the field by clicking **+ Variables** selector
  - Enter a prompt with instructions such as what to always include in the summary, length or tone. Prompts can be up to 1000 words. Only links to Drive items are supported.
    - Add variables in the field by clicking **+ Variables** selector
- Insights or trends in a sheet
  - Select the sheet with the field selector
  - Enter a prompt with instructions such as what to always include in the summary, length or tone. Prompts can be up to 1000 words. Only links to Drive items are supported.
    - Add variables in the field by clicking **+ Variables** selector
- Content from previous step
  - Select the content to summarise
    - Add variables in the field by clicking **+ Variables** selector
  - Enter a prompt with instructions such as what to always include in the summary, length or tone. Prompts can be up to 1000 words. Only links to Drive items are supported.
    - Add variables in the field by clicking **+ Variables** selector

Thinking and processing

- Check If
  - Run the sub flows only if specific conditions are met.
    - If field: Select variable from earlier steps in the flow
    - Operator field: Select operator to apply (is, is not, >, <, >=, <=, is even, is odd, is empty, is not empty, contains, does not contain, starts with, does not start with, ends with, does not end with, is true, is false)
    - Compare field: Enter text or select a variable from earlier steps in the flow
  - Add AND or OR to add further logic conditions
  - Add subflows to run when the IF statement is true

        - The flow does the steps in the subflow after Check if only if its conditions match. It does any other steps in the main flow after that.
- Filter a list
    - Use this step to filter a list to only items that match the conditions. Then add this filtered list as a variable in other steps.
    - Apply filter to
        - Select a list or add variables in the field by clicking **+ Variables** selector

Gmail

- Send a message
    - Sends an email
        - Set receiver in the To field
        - Set subject in the Subject field
        - Enter the message to send
            - Add variables in the field by clicking **+ Variables** selector
        - Add optional Cc
            - Add variables in the field by clicking **+ Variables** selector
        - Add optional Bcc
            - Add variables in the field by clicking **+ Variables** selector
- Draft a reply
    - Prepares a reply to an existing email and puts it in your Gmail Drafts folder
        - Select email to reply to
            - Add variables in the field by clicking **+ Variables** selector
        - Enter the message to send
            - Add variables in the field by clicking **+ Variables** selector
        - Set “Reply to all” as desired
        - Choose to send the reply directly, without storing it in the Gmail Drafts folder
- Add labels
    - You can select existing labels, add variables, and enter names for new labels
        - Select the email message to attach the label to
            - Add variables in the field by clicking **+ Variables** selector
        - Select the labels to add, from the dropdown list or enter custom labels.
            - To enter a new label, enter the word, press enter and then select the newly created label from the dropdown list.
            - Add variables in the field by clicking **+ Variables** selector
- Remove labels
    - Allows you to remove labels from emails
        - Select the message to remove the label from
            - Add variables in the field by clicking **+ Variables** selector
        - Select the labels to remove from the dropdown list
            - Add variables in the field by clicking **+ Variables** selector
- Mark as read
    - Marks the email as read (effectively removes the UNREAD label from the message)
        - Select the message to mark as read

        - Add variables in the field by clicking **+ Variables** selector
- Mark as unread
    - Marks the email as UNREAD (Eg. adds the label UNREAD to the message)
        - Select the message to mark as unread
            - Add variables in the field by clicking **+ Variables** selector
- Star a message
    - Adds a star to a message
        - Select the message to mark with a star
            - Add variables in the field by clicking **+ Variables** selector
- Remove star
    - Removes a star from a message
        - Select the message to remove the star from
            - Add variables in the field by clicking **+ Variables** selector
- Forward a message
    - Forwards an email message
        - Select email to forward
            - Add variables in the field by clicking **+ Variables** selector
        - Set receiver in the To field
            - Add variables in the field by clicking **+ Variables** selector
        - Enter the message to include in the email
            - Add variables in the field by clicking **+ Variables** selector
        - Decide if to also forward attachments or not. Ticking the tickbox will hold back attachments
        - Enter the subject for the email
        - Enter optional Cc
            - Add variables in the field by clicking **+ Variables** selector
        - Enter optional Bcc
            - Add variables in the field by clicking **+ Variables** selector
- Archive a message
    - Archive an email, effectively removing the INBOX label from the message. Note: There is no method to unarchive the message, or to add the label INBOX to it.
        - Select the message to archive.
            - Add variables in the field by clicking **+ Variables** selector

Chat

- Post in a space
    - Posts a message in a Chat space
        - Select space to post in
            - Add variables in the field by clicking **+ Variables** selector
        - Enter message to post
            - Add variables in the field by clicking **+ Variables** selector
        - Decide if to convert email addresses to @mentions. Only members in the space will be notified.
- Message people in Chat
    - Starts a conversation with select members
        - Add members to message

            - Add variables in the field by clicking **+ Variables** selector
        - Enter message to send
            - Add variables in the field by clicking **+ Variables** selector
        - Decide if to convert email addresses to @mentions. Only conversation members will be notified.

Sheets

- Add a row in the sheet of a spreadsheet. The sheet must have header rows prepared
    - Select spreadsheet with the field selector
    - Select sheet in the spreadsheet
    - Decide where to enter your data:
        - After the first row
        - After last data row
    - Add data by column. Column names listed as found in the first row (header row) of the sheet.

Drive

- Add email attachments to Drive
    - Stores attachments from an email to a specific drive location
        - Location in Drive
            - Select the location via the Drive button
        - Gmail attachments
            - Add variables via entering @ symbol or select by clicking **+ Variables** selector
- Create a folder
    - Adds a folder to Drive if not existing
        - Enter folder name.
            - If a folder with the same name exists in the selected location, the existing folder is used.
            - Add variables in the field by clicking **+ Variables** selector
        - Enter location for the folder in Drive
            - If location isn't set, new folders are added to My Drive. When set, the new folder will be shared to the same people as the selected folder.

Calendar

- Set up a meeting
    - Schedule a meeting in Calendar. Rooms and location aren't added to meetings created with this task. Add them manually if needed.
        - Set the title of the meeting
            - Add variables in the field by clicking **+ Variables** selector
        - Set start date
        - Set start time
            - Add variables in the field by clicking **+ Variables** selector
        - Set end date
        - Set end time
            - Add variables in the field by clicking **+ Variables** selector

        - Set repetition frequency
            - None
            - Daily
            - Weekly
            - Monthly
            - Yearly
        - Add guests by entering their email address or name and select in the dropdown list.
            - Add variables in the field by clicking **+ Variables** selector
        - Decide if this meeting should have a videoconference added (Meet).
        - Add a description of the meeting
            - Add variables in the field by clicking **+ Variables** selector
        - Set time zone
- Add guests to a meeting
    - Add guests to an existing meeting in the Calendar
        - Select meeting to add guests to
            - (Variables are not yet supported)
        - Add guests by entering their email address or name and select in the dropdown list.
            - Add variables in the field by clicking **+ Variables** selector

Docs

- Create a doc
    - Creates a new Google Docs document
        - Add a name for the document
            - Add variables in the field by clicking **+ Variables** selector
        - Enter to content to add in the document
            - Add variables in the field by clicking **+ Variables** selector
        - Set the location for the document via the field selector. If location isn't set, new docs are added to My Drive. When set, docs will be shared to the same people as the selected folder.
- Add to a doc
    - Add content to an existing document
        - Select the document to add content to
        - Set which tab to update (if any)
        - Decide position of the new content:
            - After existing content
            - Before all existing content
        - Enter the content to add
            - Add variables in the field by clicking **+ Variables** selector

Tasks

- Create a task
    - Add a task to Tasks
        - Enter title of the task
            - Add variables in the field by clicking **+ Variables** selector

        - Enter details of the task
            - Add variables in the field by clicking **+ Variables** selector
        - Set the task date, counting from the date the flow runs. Choose between:
            - No date
            - Day the flow starts
            - 1 day after the flow starts
            - 2 days after the flow starts
            - 1 week after the flow start

Asana Integration [Alpha]

What is Asana? Asana is a web and mobile software-as-a-service platform for collaborative work management, helping teams and individuals organize projects, track tasks, monitor progress, and communicate in real-time to achieve goals. It offers various features, including task and goal management, multiple project views (like lists, boards, and timelines), custom workflows, reporting, and AI-powered assistance for summarizing tasks and identifying potential issues.

To activate the integration, first press the *Connect* button and then sign in with your Asana credentials. If you are not yet using Asana, you can create an account here.

- Create project (Custom field support is coming soon)
    - Workspace
        - The name of the workspace or organization this project belongs to
    - Project Name
        - The name of the Asana project
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Team
        - The team within the Workspace that will own this project
    - Project Description
        - A summary for the project
        - Add variables in the field by clicking **+ Variables** selector or entering @
- Create section
    - Workspace
        - The name of the workspace or organization this section belongs to
    - Section Name
        - The name for the new section
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Project
        - The Asana project where the new section will be created
- Create task
    - Task Name
        - Name this task
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Workspace
        - The Asana Workspace where the task will be created
    - Project
        - The Asana project to add this task to. This list is populated from your

connected Asana account
    - Description
        - Detailed information or description for the task
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Assignee
        - The user to whom this task will be assigned
    - Due At
        - Set due time manually via
            - Pick Date
            - Pick Time
        - Or
            - Select **+ Variable** to provide a DateTime variable object
    - Followers
        - List of Users to add as followers
    - Completed
        - Mark task as completed
- Create subtask
    - Workspace
        - The name of the workspace or organization this subtask belongs to
    - Parent Task
        - The ID of the parent task under which this subtask will be created
    - Subtask Name
        - The name of the new subtask
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Assignee
        - The ID of the user to assign the subtask to
    - Due At
        - Set due time manually via
            - Pick Date
            - Pick Time
        - Or
            - Select **+ Variable** to provide a DateTime variable object
    - Notes
        - Additional details or description for the subtask. This field is optional
        - Add variables in the field by clicking **+ Variables** selector or entering @
- Add comment to task
    - Workspace
        - The name of the workspace or organization this story belongs to
    - Associated Task
        - The ID of the specific task this story is directly associated with. This field is mandatory
    - Comment
        - Formatted text for the story or comment
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Is Pinned?
        - Tick to pin this comment in the task

Confluence Integration [Alpha]

What is Confluence? Confluence is a team collaboration workspace by Atlassian where teams can create, organize, and share content like documents, project plans, and knowledge bases. It functions as a central hub for team knowledge, allowing users to collaborate in real-time, store information in an organized way, and integrate with other tools like Jira.

To activate the integration, first press the *Connect* button and then sign in with your Confluence credentials. If you are not yet using Confluence, you can create an account here.

- Create pages
  - Space
    - The space where the page will be created
  - Title
    - The title of the page
    - Add variables in the field by clicking **+ Variables** selector or entering @
  - Parent Page
    - The ID of the parent page
  - Page Content
    - The body content of the page
    - Add variables in the field by clicking **+ Variables** selector or entering @

Jira Integration [Alpha]

What is Jira? Jira is an issue and project tracking software developed by Atlassian that helps teams plan, manage, and report on their work. It is widely used for agile software development to track bugs, manage projects, and automate workflows, but it can also be used for general business tasks like marketing campaign management. Key features include customizable workflows, boards (like Kanban and Scrum), backlogs, and integrations with other tools.

To activate the integration, first press the *Connect* button and then sign in with your Jira credentials. If you are not yet using Jira, you can create an account here.

- Create issue
  - Project
    - For which project this issue belongs to
  - Issue Type
    - Select a category of issue between
      - Epic
      - Subtask
      - Task
      - Incident
      - Service Request
  - Summary
    - The summary of the issue
    - Add variables in the field by clicking **+ Variables** selector or entering @

- Description
  - The description of the issue
  - Add variables in the field by clicking **+ Variables** selector or entering @
- Priority
  - Enter only if the project uses this field
  - Select between - Lowest, Low, Medium, High, Highest
- Assignee
  - Enter only if the project uses this field
  - Select which function, user or role this is assigned to
- Reporter
  - Enter only if the project uses this field
  - Select which function, user or role this is reported by
- Create issue comment
  - Issue
    - Which issue to comment
  - Comment body
    - The body content of the comment
    - Add variables in the field by clicking **+ Variables** selector or entering @

Mailchimp Integration [Alpha]

What is Mailchimp? Mailchimp is a marketing automation and email marketing platform that helps businesses manage customer relationships and grow their brand. It provides tools to manage subscriber lists, create and send email and SMS campaigns, build landing pages, and use AI-powered insights to connect with customers across multiple channels. The service is delivered as a cloud-based software-as-a-service (SaaS) and is used by millions of customers worldwide.

To activate the integration, first press the Connect button and then sign in with your Mailchimp credentials. If you are not yet using Mailchimp, you can create an account here.

- Add subscriber
  - Audience
    - The audience list
  - Subscriber Email
    - Email address of the subscriber
    - Add variables in the field by clicking **+ Variables** selector or entering @
  - First Name
    - The contact's first name
    - Add variables in the field by clicking **+ Variables** selector or entering @
  - Last Name
    - The contact's last name
    - Add variables in the field by clicking **+ Variables** selector or entering @
  - Status
    - Select subscriber status in the dropdown as Subscribed / Unsubscribed
- Add note to subscriber
  - Audience

        - The audience list
    - Subscriber Email
        - The subscriber's email address
    - Note Content
        - The content of the note
        - Add variables in the field by clicking **+ Variables** selector or entering @
- Create campaign
    - Campaign Name
        - The title of the campaign
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Audience
        - The audience of the campaign
    - Subject
        - The subject line for the campaign
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Type
        - Select the type of campaign, choose between “regular” and “plaintext”
    - From Name
        - The 'from' name on the campaign (not an email address)
        - Add variables in the field by clicking **+ Variables** selector or entering @

Monday.com Integration[Alpha]

What is Monday.com? Monday.com is a cloud-based Work OS (Operating System) that allows teams to build custom work applications and manage projects and processes. It provides modular "building blocks" like boards, views, and automations that users can assemble to create workflows for everything from project management and CRM to development and service requests. The platform is designed to be flexible, customizable, and has recently incorporated AI-powered features.

To activate the integration, first press the Connect button and then sign in with your Monday.com credentials. If you are not yet using Monday.com, you can create an account here.

Currently there is an issue with the API connectivity between Flows and Monday.com, but when it is resolved, the following actions will be available:

- Create board
- Create group
- Create column
- Add subscriber to board
- Add user to team

Quickbooks Integration [Alpha]

What is QuickBooks? QuickBooks is accounting software developed by Intuit for small and medium-sized businesses to manage their finances. It offers cloud-based and desktop versions that help with tasks like invoicing, expense and inventory tracking, payroll, and generating financial reports. Key features include connecting to bank accounts, managing sales tax, and integrating with other business apps.

To activate the integration, first press the Connect button and then sign in with your QuickBooks credentials. If you are not yet using QuickBooks, you can create an account here.

Quickbooks does not provide a free trial account why this feature has not been tested. The actions supposedly available are:

- Create customer
- Create invoice
- Create sales receipt
- Create estimate
- Create bill
- Create vendor
- Create payment record

Salesforce Integration [Alpha]

What is Salesforce? Salesforce is a cloud-based software company that provides a customer relationship management (CRM) platform. It helps businesses manage their sales, service, marketing, and commerce efforts by connecting all customer data onto a single, shared platform, often using AI to improve efficiency and customer relationships.

To activate the integration, first press the Connect button and then sign in with your Salesforce credentials. If you are not yet using Salesforce, you can create an account here.

- Create lead
    - First Name
        - The first name of the lead
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Last Name
        - The last name of the lead
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Company Name
        - The company name of the lead
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Lead Status
        - The status of the lead, between New, Qualified, Contacted, Unqualified, Nurturing (or any other that you may have created)
    - Email
        - The email of the lead
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Phone Number
        - The phone number of the lead
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Website

        - The website of the lead
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Lead Source
        - The source of the lead
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Description
        - Description about the lead
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Owner
        - The ID of the user who owns the lead, select from defined dropdown list
- Create contact
    - First Name
        - The first name of the contact
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Last Name
        - The last name of the contact
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Account Name
        - The account associated with the contact, select from drop down list
    - Phone Number
        - The phone number of the contact
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Mailing Street
        - The mailing street of the contact
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Mailing City
        - The mailing city of the contact
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Mailing State
        - The mailing state of the contact
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Mailing Postal Code
        - The mailing postal code of the contact
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Mailing Country
        - The mailing country of the contact
        - Add variables in the field by clicking **+ Variables** selector or entering @
- Create account
    - Account Name
        - The name of the account
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Project Type
        - Select Project type from the dropdown list, ex. Customer, Partner, Prospect
    - Website
        - The website of the account
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Phone Number

        - The phone number of the parent account
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Industry
        - The industry of the account
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Description
        - Description of the account
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Owner
        - The owner of the account, select from defined dropdown list
- Create opportunity
    - Name
        - The name of the opportunity
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Close Date
        - Pick a date in the date picker or select **+ Variable** to provide a DateTime variable object
    - The stage of the opportunity
        - Select from dropdown list , ex Prospecting, Qualification, Closed Won
    - Account Name
        - The account associated with the opportunity, select from the dropdown
    - Amount
        - The amount of the opportunity
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Contact Name
        - The contact associated with the opportunity, select from the dropdown
    - Description
        - Description about the opportunity
        - Add variables in the field by clicking **+ Variables** selector or entering @
- Create case
    - Case Status
        - The status of the case, select from the dropdown - Escalated, New, Closed, Working, Waiting on Customer
    - Case Origin
        - The origin of the case
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Case Subject
        - The subject of the case
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Contact Name
        - The contact name associated with the case, select from the dropdown
    - Account Name
        - The account name associated with the case, select from the dropdown
    - Description
        - Description about the case
        - Add variables in the field by clicking **+ Variables** selector or entering @
- Create notes

    - Note Title
        - The title of the note
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Note Body
        - The body of the note
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Parent Account
        - The parent account of the note, select from the dropdown
- Create task
    - Subject
        - The subject of the task
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Task Status
        - Select status between:
            - Not Started
            - In Progress
            - Completed
            - Waiting on someone else
            - Deferred
    - Priority
        - Select priority between
            - High
            - Normal
            - Low
    - Activity Date
        - Pick a date in the date picker or select **+ Variable** to provide a DateTime variable object
    - Assignee
        - The owner of the task, select from the dropdown
    - Related Object
        - The object related to the task, select from the dropdown
    - Related User
        - The user related to the task, select from the dropdown

Slack Integration [Alpha]

What is Slack? Slack is a cloud-based platform for team communication that brings together people, information, and apps in one place to make work more organized and productive. It functions as an alternative to email for businesses, using channels for organized group chats, direct messaging for one-on-one conversations, and integrations with other apps to automate tasks.

To activate the integration, first press the Connect button and then sign in with your Slack credentials. Currently you will see a warning when connecting Flows: "*This app is not approved by Slack. Apps are reviewed to ensure a quality experience. Learn more.*", ignore this and proceed. If you are not yet using Slack, you can create an account here.

- Create channel

    - Channel Name
        - The name of the channel (use lowercase letters and hyphens only; no spaces, capital letters, or special characters)
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Public visibility
        - Should this channel be publicly visible?
- Send channel message
    - Channel Name
        - The name of the public or private channel, select from the dropdown
    - Text
        - The content of the message
        - Add variables in the field by clicking **+ Variables** selector or entering @
- Add a reminder
    - User
        - The user that should receive the reminder, select from the dropdown
    - Reminder Text
        - The content of the reminder
        - Add variables in the field by clicking **+ Variables** selector or entering @
    - Time
        - Set time manually via
            - Pick Date
            - Pick Time
        - Or
            - Select **+ Variable** to provide a DateTime variable object

Step 3: Test and Activate

Before activating your flow, it's crucial to test it to ensure it functions as expected.

Steps for testing:

1. Run a simulated event to trigger the flow.
2. Review the results to confirm that all actions were performed correctly.
3. Once satisfied, activate your flow to put it into production.

Managing Flows

The "My Flows" section of the dashboard allows you to manage all your created flows.

Feature	Description
My Flows	Lists your current flow configurations and lets you edit, turn them on or off, and see their activity.

Feature	Description
Activity	Lists the activity of the flows with filtering to see only completed, ongoing or failed flows.

Advanced Features and Tips

- **Conditional Logic:** Basic IF condition is now available
- **Loops:** Not yet available.
- **Error Handling:** Not yet available.
- **Templates:** Pre-built templates for common workflows are available to quickly get started. Customise these templates to fit your specific requirements.
- **Integration with Third-Party Apps:** Currently being trialed for some actions [Alpha].
- **Naming Conventions:** Use clear and descriptive names for your flows to easily identify their purpose, especially as you create more complex workflows.
- **Documentation:** Maintain simple documentation for your flows, outlining their purpose, triggers, actions, and any dependencies.

Troubleshooting

If your flow isn't working as expected, consider the following troubleshooting steps:

- **Check Flow History:** Review the execution history of the problematic flow. Error messages or failed steps will provide valuable insights.
- **Verify Permissions:** Ensure that Google Workspace Flows has the necessary permissions to access and modify data in the connected applications. You may need to have admin rights to verify this access for your account.
- **Review Trigger and Action Configurations:** Double-check that all trigger conditions are met and action parameters are correctly configured.
- **Test with Sample Data:** Use minimal, controlled sample data to test your flow and isolate issues.
- **Consult Help Documentation:** Refer to the official Google Workspace Flows help documentation for specific error codes and solutions.

Support and Resources

For further assistance and to explore more advanced functionalities, please refer to the following resources:

- **Google Workspace Admin Help:** For administrators managing Google Workspace settings and permissions.
- **Google Workspace Learning Center:** Offers tutorials and tips for various Google Workspace applications.

- **Google Workspace Flows Community Forum:** Connect with other users, ask questions, and share best practices.

New actions are added continuously and some may be removed. This document is up to date for users in Europe on the 15th of October 2025.

Google Workspace Flows is currently available to you if you have Early Access activated for your Workspace account. It shows promise in transforming the way you work, to automate mundane tasks, and letting you focus on what truly matters.

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