



Email-to-Flow

User Guide Version 3.x

Sprocket Logic

<https://www.sprocketlogic.com>

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Overview

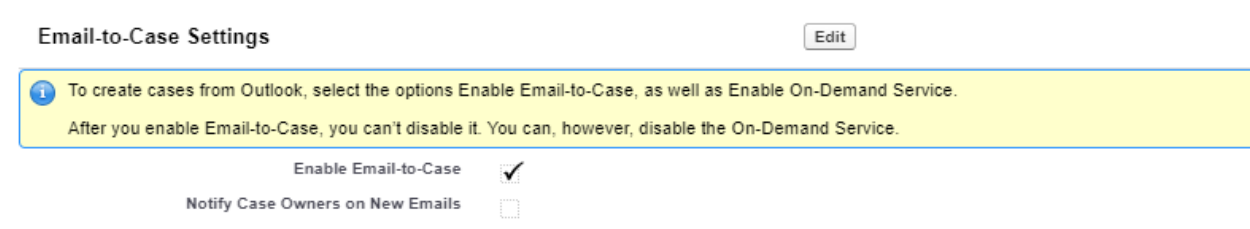
Welcome to the Email-to-Flow Installation Guide. In a matter of minutes, we will have you up and running with Email-to-Flow.

Installation

Upon installation of the Email-to-Flow application, some configuration will be required.

Email-to-Case Must be Enabled

Email-to-Case must be enabled in your instance. In the Quick Search Box, enter “Email-to-Case” and set “Enable Email-to-Case”.



Email Service

Salesforce Email service is an automated process that uses Apex classes to process inbound email. For more information on Email Services, please reference Salesforce documentation available at [What Are Email Services?](#)

Email-to-Flow leverages the email services capabilities including an Apex Class. To set up the Email Service:

In the Quick Search Box, enter “Email Services” or navigate to Custom Code > Email Services. Select “Email Services”. Click on the New Email Service button.

Email Service

Email services let you use Apex classes to process the contents, headers, and attachments of inbound email. Use the settings below to create an email service. After saving, create one or more email service addresses to receive messages for processing.

Email Service Information

Email Service Name:

Apex Class:

Accept Attachments:

Advanced Email Security Settings: ☐

Accept Email From:

Convert Text Attachments to Binary Attachments: ☐

Active: ☒

Failure Response Settings

Configure how salesforce.com responds when an attempt to access this email service fails for the reasons shown below:

Over Email Rate Limit Action:

Deactivated Email Address Action:

Deactivated Email Service Action:

Unauthenticated Sender Action:

Unauthorized Sender Action:

Enable Error Routing: ☐

Route Error Emails to This Email Address:

Field	Value
Email Service Name	Enter a name for your Email Service
Apex Class	Choose EmailServiceToFlow. This is delivered by the Email-to-Flow installation.
Active	Check the box to activate the Email Service.

Please consult the Salesforce documentation related to EmailServices for a complete explanation of all the fields.

Save the record by clicking on the “Save and New Email Address” button.

Email Service Address

Specify an email address for this email service. The email service processes messages sent to this address. One email service can have multiple email addresses.

Email Service Information

Email Service Name	EmailToFlowService
Accept Email From	All email addresses (subject to security settings)

Email Address Information

Email Address Name	EmailToSlowAddress
Email address	EmailToFlowService Specify the local-part of the email address. Salesforce.com assigns the domain name part of the address.
Active	☒
Context User	Sean Fielding 
Accept Email From	

Field	Value
Email Address Name	Enter a name for your Email Address
Email Address	Keep the default or enter a new name
Active	Set to checked
Context User	Set the context user that will eventually process the flow
Accept Email From	Remove any values defaulted

Please consult the Salesforce documentation related to EmailServices for a complete explanation of all the fields.

Save the record by clicking on the “Save” button. Upon saving the record, the Email Services Setup screen will display your service and newly created email address. Note the email address provided.

The screenshot shows the Salesforce Setup page for Email Services. The header includes a gear icon, the word "SETUP", and "Email Services". The main heading is "Email Service: EmailToFlowService". Below this are buttons for "Edit", "Activate", "Deactivate", "Delete", and "Cancel".

Email Service Name	EmailToFlowService
Apex Class	EmailServiceToFlow
Accept Attachments	All
Advanced Email Security Settings	☐ i
Accept Email From	All email addresses (subject to security settings)
Convert Text Attachments to Binary Attachments	☐ i
Active	☒

▼ Failure Response Settings

Over Email Rate Limit Action	Discard message
Deactivated Email Address Action	Discard message
Deactivated Email Service Action	Discard message
Unauthenticated Sender Action	Discard message
Unauthorized Sender Action	Discard message
Enable Error Routing	☐ i

Email Addresses New Email Address

Action	Email Address Name	Email Address
View Edit	EmailToSlowAddress	emailtoflowservice@1- [REDACTED] apex.salesforce.com

EmailtoFlow Custom Metadata Type

The EmailtoFlow CMDT provides a mapping between the apex email service and your specific flow. The CMDT comes pre-configured with the Email-to-Case template.

In the Quick Search Box, enter “Custom Metadata Types” or navigate to Custom Code > Custom Metadata Types. Select “Custom Metadata Types”.

[Del](#) | [Manage Records](#)

[EmailToFlow](#)

Public

EmailToFlow__mdt

Click on the “Manage Records” next to the CMDT labels EmailtoFlow.

 **SETUP**
Custom Metadata Types

EmailToFlow

View: All ▼ [Create New View](#)

Action	Label ↑	EmailToFlow Name
Edit Del	Email2Case	Email2Case

Click on the “Edit” next to the Email2Case record. This reveals the pre-configured setup.

EmailToFlow (Managed)

 This EmailToFlow is managed, meaning that you may only edit certain attributes. [Display More Information](#)

EmailToFlow Detail

[Edit](#) [Clone](#)

Label	Email2CaseDefault
EmailToFlow Name	Email2CaseDefault
Priority	Medium
Origin	Email
Flow Name	Email_to_Case_Template
Flow Namespace	EmailtoFlow
Email Address	addyourrown@addit.com
isActive	☒
Accept Text Attachments	☒
Accept Binary Attachments	☒

▼ Size Limits

Max HTML Body Size	
Max Plain Text Body Size	
Max Headers Size	

Created By Sean Fielding, 3/25/2022, 9:15 AM

[Edit](#) [Clone](#)

Field	Value
Label	Enter a Label
EmailtoFlow Name	Enter a Name
Priority	The value for priority will be passed to the flow. When used in Email-to-Case context, this sets the Case priority.
Origin	The value for origin will be passed to the flow. When used in Email-to-Case context, this sets the Case origin.
Flow Name*	The name of the flow to call email is

	received to the email service email address.
Flow Name Namespace	If using the Flow Template, keep the namespace set to "EmailtoFlow". If creating a copy of the flow template, leave this blank.
Email Address	The email address that launched the email service. Set this to the email address generated when the email service was created.
isActive	Set to True
Accept Text Attachments	Set to true if the process will accept text attachments.
Accept Binary Attachments	Set to true if the process will accept binary attachments
Max HTML Body Size	Set the maximum number of characters to retain for the Email HTML Body. Leave blank to set no limit. **
Max Plain Text Body Size	Set the maximum number of characters to retain for the Email Plain Text Body. Leave blank to set no limit. **
Max Headers Size	Set the maximum number of characters to retain for the Email Headers Body. Leave blank to set no limit. **

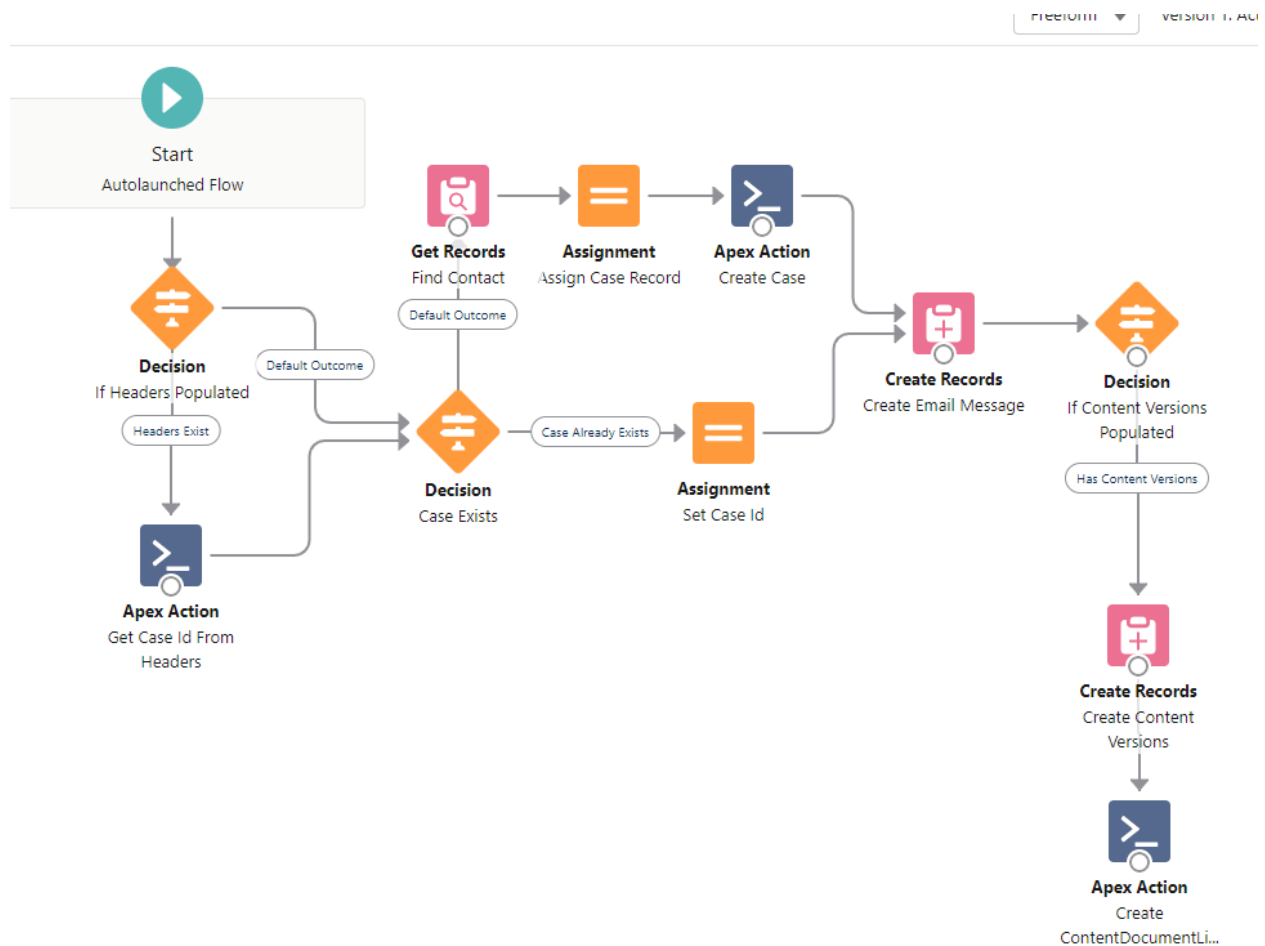
* The Flow Name is the key link between the email service email address and the flow. If you create a new flow from the delivered template, be sure to update the flow name.

** When leveraging a standard Flow create records action, truncation can not be configured. In order to truncate email message record values, you must either set these parameters or use the E2F: Create Email Messages apex action.

Email-to-Case Template Flow (Reference Id is Retiring)

The Email-to-Flow application comes with a default Email-to-Case template flow. If you wish to mimic existing Email-to-Case functionality, there is no need to touch the flow.

(NOTE: If leveraging Lightning Email Token, please use the Email-to-Case Lightning Email Token Flow Template instead)

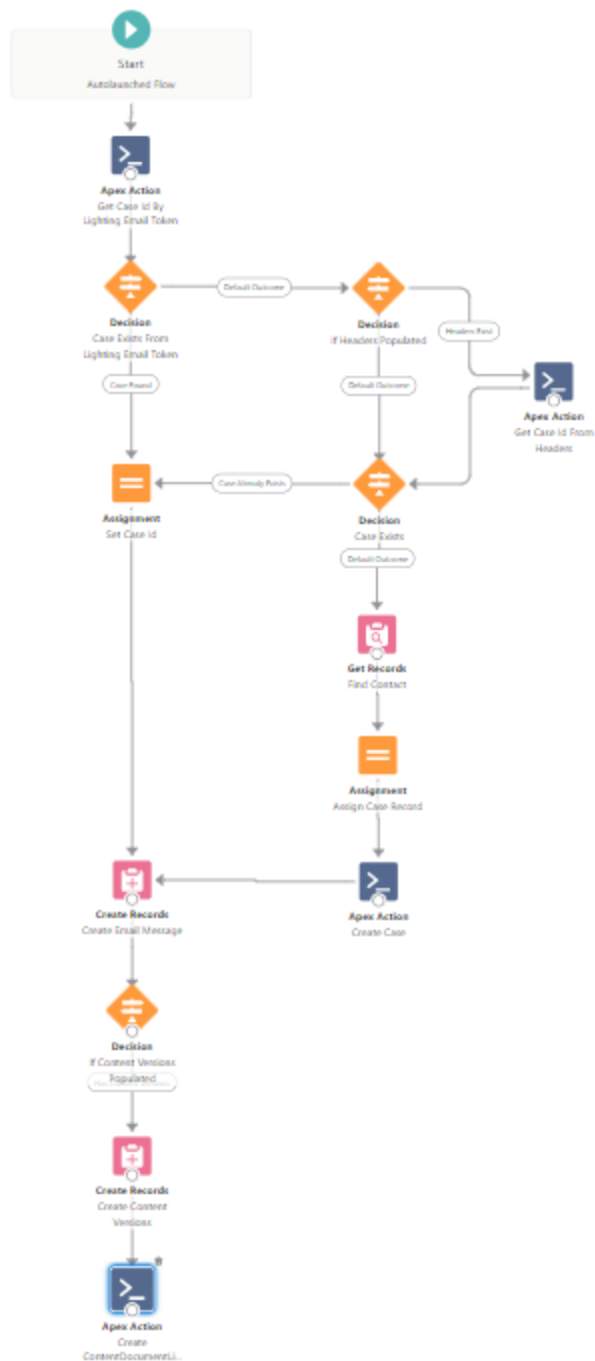


If you wish to modify or extend the template, simply save a copy of the flow and make your modifications. In Flow Builder, choose Save As -> Save as a New Flow.

To fully implement a new flow, make sure the CMDT reflects your correct flow name. The internal flow name can be retrieved at any time by selecting "View Properties" in Flow Builder. The field "Flow API Name" hold the name value.

Email-to-Case Lightning Email Token Template Flow

The Email-to-Flow application comes with a default Email-to-Case Lightning Email Token template flow. If you wish to mimic existing Email-to-Case functionality, there is no need to touch the flow. This flow follows the standard Email-to-Case process which first attempts to find a match via the Lightning Email Token. If no match is found, an attempt is made via email Headers.



If you wish to modify or extend the template, simply save a copy of the flow and make your modifications. In Flow Builder, choose Save As -> Save as a New Flow.

To fully implement a new flow, make sure the CMDT reflects your correct flow name. The internal flow name can be retrieved at any time by selecting “View Properties” in Flow Builder. The field “Flow API Name” hold the name value.

Apex Actions

The following Apex Actions are delivered with the Email-to-Flow installation. All the Email-to-Flow Apex Actions begin with “E2F” for quick identification in the New Action drop down.

E2F: Create Case and Run Assignments

Leverage the **Create Case and Run Assignments** apex action to create a case and run standard assignments rules.

Inputs

Variable	Required	Description
Case	True	The Case record to be created
DML Use Default Assignment Rule	False	See Assignment Rule Header Property Setting DML Options Apex Developer Guide Salesforce Developers
DML Assignment Rule Id	False	See Assignment Rule Header Property Setting DML Options Apex Developer Guide Salesforce Developers
DML Trigger Auto Response Email	False	See Email Header Property Setting DML Options Apex Developer Guide Salesforce Developers
DML Trigger Other Email	False	See Email Header Property Setting DML Options Apex Developer Guide Salesforce Developers
DML Trigger User Email	False	See Email Header Property Setting DML Options Apex Developer Guide Salesforce Developers

Outputs

Variable	Description
CaseId	The id of the Case created by the apex action
isSuccess	Set to True if the apex action was successful. Set to False if an error was encountered.
Error Message	If isSuccess is False, the message of the error encountered

E2F: Create Content Document Links

Leverage the **Create Content Document Links** apex action to link files to their respective parent object. For example, linking email attachments to the email message record or the case record.

Inputs

Variable	Required	Description
Record Id	True	The id of the record to be parented
ContentVersions	True	List of the ContentVersion records to be linked

Outputs

Variable	Description
status	String set to "Pass" if successful, "Fail" if an error was encountered.
Error Message	If status is "Fail", the message of the error encountered

E2F: Detect Auto Reply

Leverage the **Detect Auto Reply** apex action to identify email that is auto replied via Microsoft (such as Out of the Office email). See use case [Email-to-Flow, let's ignore Auto Responses](#).

Inputs

Variable	Required	Description
Email Header	True	The email header string

Outputs

Variable	Description
Is Auto Reply	If reviewing the X-AutoReply and X-AutoRespond header keys indicates the email is an auto reply, Is Auto Reply is set to True. Else False.
isSuccess	Set to True if the apex action was successful. Set to False if an error was encountered.
Error Message	If status is "Fail", the message of the error encountered

E2F: Detect Language

Leverage the **Detect Language** apex action to detect the language for a given sample text.

NOTE: The Google Translation API is a paid Google Service. Please reference Googles pricing guide for more information ([Pricing](#) | [Cloud Translation](#) | [Google Cloud](#)).

Inputs

Variable	Required	Description
Sample Text	True	The sample text to determine the language. For a typical Email-to-Case scenario, this sample text should be the plain text body of the incoming email.
Sample Text Max Length	True	The maximum length used to determine the email body language. Start with a size of 100 and adjust it according to your testing results.

Outputs

Variable	Description
Language Detected	The language which was detected in the sample text.
isSuccess	Set to True if the apex action was successful. Set to False if an error was encountered.
Error Message	If status is "Fail", the message of the error encountered

Additional Requirements

Google Cloud Translation Basic V2 API Keys

The Detect Language apex action leverages the Google Cloud Translation Basic V2 API. In order to leverage this API, you will need a Google account with the Cloud Translation API enabled and the appropriate API keys to make authenticated calls. Please review [Cloud Translation](#) to generate the API Key.

Create an External Credential

In the Quick Search Box, enter "Named Credentials" or navigate to Security > Named Credentials. Select "External Credentials". Click on the New button. Enter the values and choose Save.

New External Credential

* Label	Google Language Detect	* Name	Google_Language_Detect
* Authentication Protocol	Custom		

[Cancel](#)[Save](#)

Field	Value
Label	Google Language Detect
Name	Google_Language_Detect
Authentication Protocol	Custom

Locate Custom Headers and click the New Button. Enter the values and save the record.

Create Custom Header

* Name	X-google-api-key
* Value	Enter Your Google Translate API Key Here
* Sequence Number	1

[Cancel](#)[Save](#)

Field	Value
Name	X-goog-api-key
Value	Enter Your API Key
Authentication Protocol	Custom

Locate Permission Set Mappings and click the New button. Associate the credentials to all permission sets that require the ability to execute the apex action. For example, this configuration assigns the credentials to the Sales Cloud User permission set. NOTE: The Identity Type will always be Named Principal and no Authentication Parameters are required.

Edit Permission Set Mapping

* Permission Set

Sales Cloud User

▼

* Sequence Number

1

* Identity Type

Named Principal

▼

Authentication Parameters Add

Cancel

Save

Create an External Credential

In the Quick Search Box, enter “Named Credentials” or navigate to Security > Named Credentials. Select “Named Credentials”. Click on the New button. Enter the values and choose Save.

New Named Credential

* Label

* Name

* URL

Authentication

* External Credential

Client Certificate

Callout Options

Generate Authorization Header ☐

Allow Formulas in HTTP Header ☐

Allow Formulas in HTTP Body ☐

Managed Package Access

Allowed Namespaces

[Cancel](#)
[Save](#)

Field	Value
Label	DetectLanguage
Name	DetectLanguage
URL	https://translation.googleapis.com/language/translate/v2/detect
Generate Authorization Header	unchecked
Allowed Namespaces	EmailToFlow

The completed setup should look similar to the following:

SETUP > NAMED CREDENTIALS

 **Google Language Detect**

EditDelete

Label

Google Language Detect

Name

EmailtoFlow__GoogleLanguageDetect

Authentication Protocol

Custom

Related Named Credentials

Label	Name	URL
DetectLanguage	EmailtoFlow__DetectLanguage	https://translation.googleapis.com/language/translate/v2/detect

Permission Set Mappings

New

Sequence Number	Permission Set	Authentication Parameters	Actions
1	Sales Cloud User	0	

Custom Headers

New

Sequenc...	Name	Value	Actions
1	X-goog-api-key	Enter Your Google Translate API Key Here	

E2F: Generate Case Message Id

Leverage the **Generate Case Message Id** apex action to generate a message id for your case (leveraging Salesforce's standard generate case Message ID functionality). Use this apex action when sending custom email that needs to be linked back to an object or when you need custom email linked back to an object but no Email Message linking will be present. See use case [Email-To-Flow, Custom Email that Links back to a Case](#).

Inputs

Variable	Required	Description
Record Id	True	The id of the record that need to be linked back

Outputs

Variable	Description
Message Id	The resulting Message Id to be used as a Reference in the sending email header

E2F: Generate Email Threading Token (Lightning Email Token)

Leverage the **Generate Email Threading Token (Lightning Email Token)** apex action to generate a Lightning Email Token. See [getFormattedThreadingToken\(recordId\) | Apex Reference Guide | Salesforce Developers](#) for more information.

Inputs

Variable	Required	Description
Case Id	True	The case Id

Outputs

Variable	Description
Email Threading Token	The token generated
isSuccess	Set to True if the apex action was successful. Set to False if an error was encountered.
Error Message	If status is "Fail", the message of the error encountered

E2F: Generate Message Id

Leverage the **Generate Message Id** apex action to generate your own message id (to link back to cases). Use this apex action when sending custom email that needs to be linked back to an object or when you need custom email linked back to an object but no Email Message linking will be present. See use case [Email-To-Flow, Custom Email that Links back to a Case](#).

Inputs

Variable	Required	Description
Record Id	True	The id of the record that need to be linked back

Outputs

Variable	Description
Message Id	The resulting Message Id to be used as a Reference in the sending email header

E2F: Get Case Id from ETF Headers

Leverage the **Get Case Id from ETF Headers** apex action in conjunction with the **Generate Message Id** apex action. This apex action can link cases by the Message Id generated in the **Generate Message Id** apex action. See use case [Email-To-Flow, Custom Email that Links back to a Case](#).

Inputs

Variable	Required	Description
Headers	True	The email header string

Outputs

Variable	Description
Case Id	The Id of the case found
isClosed	If a case is found, the isClosed status indicator of that case
Status	If a case is found, the specific status of the case
Case Exists	A true/false indicating if a matching case was found

E2F: Get Case Id from Headers

Leverage the **Get Case Id from Headers** apex action to match a case record. This is the standard Salesforce functionality to link cases by the header. If leveraging **Generate Message Id**, use the **Get Case Id from ETF Headers** apex action instead. See [getCaseIdFromEmailHeaders\(headers\) | Apex Developer Guide | Salesforce Developers](#) for more information.

Inputs

Variable	Required	Description
Email Header	True	The email header string

Outputs

Variable	Description
Case Id	The Id of the case found
isClosed	If a case is found, the isClosed status indicator of that case
Status	If a case is found, the specific status of the case
Case Exists	A true/false indicating if a matching case was found

E2F: Get Header Value

Leverage the **Get Header Value** apex action to search a specific header key value set in email headers.

Inputs

Variable	Required	Description
Email Header	True	The email header string
Header Key	True	The key to search for in the email header

Outputs

Variable	Description
Header Value	The value found
Key Exists	A True/False indicating if the key exists in the header
isSuccess	Set to True if the apex action was successful. Set to False if an error was encountered.
Error Message	If status is "Fail", the message of the error encountered

E2F: Get To Address From Header

Leverage the **Get Header Value** apex action to search for the “To” header key value set in email headers. This may be required to retrieve the true original To email address when leverage forwarding and redirects.

Inputs

Variable	Required	Description
Email Header	True	The email header string

Outputs

Variable	Description
Header Value	The value found
Key Exists	A True/False indicating if the key exists in the header
isSuccess	Set to True if the apex action was successful. Set to False if an error was encountered.
Error Message	If status is “Fail”, the message of the error encountered

Scenario for Apex Action:

A user (user@randomuser.com) sends an email to the support email address (support@company.com).

The support email address has a redirect rule which sends the email to the email service email address (longemail@longemail12345678910.salesforce.com).

In this scenario, the To email address value will be set to longemail@longemail12345678910.salesforce.com. If the original email address is required, leverage the E2F: Get To Address From Header apex action to retrieve the true original To address.

E2F: Get Outlook Spam Confidence

Leverage the **Get Outlook Spam Confidence** apex action to evaluate an Outlook email message for spam. See use case [Email-to-Flow, let's deal with some spam \(Microsoft 365\)](#).

Inputs

Variable	Required	Description
Email Header	True	The email header string

Outputs

Variable	Description
Spam Confidence Level	See Email-to-Flow, let's deal with some spam (Microsoft 365)
Spam Confidence Level Definition	See Email-to-Flow, let's deal with some spam (Microsoft 365)
Spam Confidence Level Category	See Email-to-Flow, let's deal with some spam (Microsoft 365)
Bulk Compliance Level	See Email-to-Flow, let's deal with some spam (Microsoft 365)
Bulk Compliance Level Definition	See Email-to-Flow, let's deal with some spam (Microsoft 365)
isSuccess	Set to True if the apex action was successful. Set to False if an error was encountered.
Error Message	If status is "Fail", the message of the error encountered

E2F: Move Email Message

Leverage the **Move Email Message** apex action to move an email message from one parent to another (including the attachments/files). See use case [Email-to-Flow, let's move some email](#).

Inputs

Variable	Required	Description
Existing EmailMessage Id	True	The email message id to be moved
New Case Id	True	The to id of the case to be reparented.

Outputs

Variable	Description
newEmailMessageId	The id of the new Email Message created
isSuccess	Set to True if the apex action was successful. Set to False if an error was encountered.
Error Message	If status is "Fail", the message of the error encountered

E2F: Get Regex Pattern

Leverage the **Get Regex Pattern** apex action to execute a regular expression to find a pattern match.

Inputs

Variable	Required	Description
Input	True	The input string that contains the pattern. For example, the email subject.
Regex Pattern	True	The Regex pattern to search. Common REGEX Validation (salesforce.com)

Outputs

Variable	Description
Matched Text	If the pattern found a match, the first match found.
IsSuccess	False if an error occurred during the process
ErrorMessage	If IsSuccess is false, the error message

E2F: Get All Matching Regex Patterns

Leverage the **Get All Matching Regex Patterns** apex action to execute a regular expression to find all pattern matches.

Inputs

Variable	Required	Description
Input	True	The input string that contains the pattern. For example, the email subject.
Regex Pattern	True	The Regex pattern to search. Common REGEX Validation (salesforce.com)
Seperator	True	The separator to leverage in the returned pattern list. For example, ",".

Outputs

Variable	Description
All Matched Text	If the pattern found matches, all matches are returned with the separator.
Matches Found	The number of matching patterns found.
IsSuccess	False if an error occurred during the process
ErrorMessage	If isSuccess is false, the error message

E2F: Review BlackList

Leverage the **Review BlackList** apex action to blacklist email address and/or email address domains from the email-to-flow process.

Inputs

Variable	Required	Description
Email Address	True	The email address to evaluate against the blacklist.

Outputs

Variable	Description
blackLiistReason	If domainBlackListed or emailBlackListed is true and a reason was identified, it is returned in this variable.
domain	The domain retrieved from the email address.
domainBlackListed	Set to True if the email address domain is blacklisted. A blacklisted email address overrides a blacklisted domain.
emailBlackListed	Set to True if the email address is blacklisted. A blacklisted email address overrides a blacklisted domain.
isSuccess	Set to True if the apex action was successful. Set to False if an error was encountered.
Error Message	If status is "Fail", the message of the error encountered

BlackList Custom Metadata Type

The BlackList Custom Metadata Type identifies active email addresses and email address domains to blacklist.

In the Quick Search Box, enter “Custom Metadata Types” or navigate to Custom Code > Custom Metadata Types. Select “Custom Metadata Types”. Choose “Managed Records” for the BlackList CMDT.

The screenshot shows the Salesforce 'Custom Metadata Types' setup page for a 'BlackList' type. The record is titled 'test' and is managed. The 'BlackList Detail' section shows the following fields: 'Label' (test), 'BlackList Name' (test), 'IsActive' (checked), 'Type' (Domain), 'Value' (test.com), 'Reason' (Test.com is not a valid domain), and 'Created By' (Sean Fielding, 1/7/2023, 9:26 AM). The 'Protected Component' section shows 'Namespace Prefix' (EmailtoFlow) and 'Last Modified By' (Sean Fielding, 1/7/2023, 12:35 PM). There are 'Edit', 'Delete', and 'Clone' buttons at the top and bottom of the record details.

Field	Value
Label	Any label for the CMDT that is appropriate.
BlackList Name	Any name for the CMDT that is appropriate.
Active	Check the box to activate the blacklist item.
Type	Is this a domain or email address.
Value	The value for the domain or email address.
Reason	Option value to further qualify the black list item.

E2F: Shrink Email Header

Leverage the **Shrink Email Header** apex action to reduce the footprint of the email header leaving only necessary information. See use case [Email-to-Flow, What about those pesky email headers?](#).

Inputs

Variable	Required	Description
Email Header	True	The email header string
Purge Header	False	If true, the email header is simply purged
Shrink List	False	If true, the email header is shrunk according to the values populated in the Email_Header_Key_Value custom metadata type.

Outputs

Variable	Description
shrunkEmailHeader	The resulting email header string
isSuccess	Set to True if the apex action was successful. Set to False if an error was encountered.
Error Message	If status is "Fail", the message of the error encountered

E2F: Get Salesforce Thread Id

Leverage the **Get Salesforce Thread Id** apex action to retrieve the thread Id associated to a case. Note: Once you Opt In to Disable REF ID and Transition to New Email Threading Behavior, the apex action will always return ". This apex action should be used for transitional purposes only.

Inputs

Variable	Required	Description
Case Id	True	The case Id

Outputs

Variable	Description
Thread Id	The thread Id associated to the case. Note: Once you Opt In to Disable REF ID and Transition to New Email Threading Behavior, the apex action will always return ". This apex action should be used for transitional purposes only.

E2F: Get Case Id from Thread Id (Original Approach)

Leverage the **Get Case Id from Thread Id** apex action to find the case that matches the thread id. Note: Once you Opt In to Disable REF ID and Transition to New Email Threading Behavior, the apex action will always return “. This apex action should be used for transitional purposes only.

Inputs

Variable	Required	Description
Thread Id	True	The thread id from the incoming email message.

Outputs

Variable	Description
Case Id	The Id of the case found
isClosed	If a case is found, the isClosed status indicator of that case
Status	If a case is found, the specific status of the case
Case Exists	A true/false indicating if a matching case was found
isSuccess	Set to True if the apex action was successful. Set to False if an error was encountered.
Error Message	If status is “Fail”, the message of the error encountered

E2F: Get Case Id From Email Thread Token (Lightning Email Token)

Leverage the **Get Case Id from Email Thread Token (Lightning Email Token)** apex action to find the case that matches the lightning email token.

Inputs

Variable	Required	Description
Subject	True	The email subject
Plain Text Body	True	The email plain text body
HTML Body	Ture	The email HTML Body

Outputs

Variable	Description
Case Id	The Id of the case found
isClosed	If a case is found, the isClosed status indicator of that case
Status	If a case is found, the specific status of the case
Case Exists	A true/false indicating if a matching case was found

E2F: Get Lead, Contact, User Id from Headers

Leverage the **Get Lead, Contact, User Id from Headers** apex action to retrieve the record id based on an email header In-Reply-to. Note: This functionality is specific to Email-to-Lead, Email-to-User, and Email-to-Contact.

Inputs

Variable	Required	Description
Headers	True	The email Headers string
Object Name	True	Lead, Contact, or User

Outputs

Variable	Description
Record Id	If a match was found, the Lead, Contact, or User record id that was found
RecordExists	A T/F indicate that Lead, Contact, or User record was found
EmailMessageExists	A T/F indicating that a match was found for the EmailMessage
EmailMessageId	The EmailMessageId used for matching
HeaderValueFound	A T/F to indicate that the email header contains an In-Repy-To value
InReplyToValue	The In-Reply-To value retrieved from the email header
IsSuccess	False if an error occurred during the process
ErrorMessage	If isSuccess is false, the error message

E2F: Get Object from Headers

Leverage the **Get Object from Headers** apex action to retrieve the record id based on an email header In-Reply-to (such as Opportunity). Note: If looking for Lead, User, Or Contact, use **Get Lead, Contact, User Id from Headers** instead.

Inputs

Variable	Required	Description
Headers	True	The email Headers string
Object Name	True	Object Name (such as Opportunity)

Outputs

Variable	Description
Record Id	If a match was found, the Lead, Contact, or User record id that was found
RecordExists	A T/F indicate that Lead, Contact, or User record was found
EmailMessageExists	A T/F indicating that a match was found for the EmailMessage
EmailMessageId	The EmailMessageId used for matching
HeaderValueFound	A T/F to indicate that the email header contains an In-Repy-To value
InReplyToValue	The In-Reply-To value retrieved from the email header
IsSuccess	False if an error occurred during the process
ErrorMessage	If isSuccess is false, the error message

E2F: File Wipe

Leverage the **File Wipe** apex action to apply File Wipe actions to rename or purge email signatures or other nuisance attachments.

Inputs

Variable	Required	Description
Email Attachments	True	The email attachments associated with the email
File Wipe Rule	True	The File Wipe Rule to apply. File Wipe Rules are defined in the File Wipe Rules Custom MetadataType.

Outputs

Variable	Description
Email Attachments	The updated email attachments. In
IsSuccess	False if an error occurred during the process
ErrorMessage	If isSuccess is false, the error message

E2F: Create Email Messages

Leverage the **Create Email Messages** apex action to create email messages records with truncation activated.

Inputs

Variable	Required	Description
Email Message	True	The email message record

Outputs

Variable	Description
Email Message Id	The id of the email message created.
IsSuccess	False if an error occurred during the process
ErrorMessage	If isSuccess is false, the error message

E2F: Remove File Extensions

Leverage the **Remove File Extensions** apex action to include specific file extensions or exclude specific file extensions as a part of your flow.

Variable	Required	Description
Email Attachments	True	The email attachments associated with the email
Include File Extensions	True	True to include the File Extensions referenced. False to exclude the File Extensions referenced.
File Extensions	True	Comma delimited list of file extensions (example: pdf,txt,docx)

Outputs

Variable	Description
Email Attachments	The remaining email attachments after the process has run
IsSuccess	False if an error occurred during the process
ErrorMessage	If isSuccess is false, the error message

E2F: Parse CSV Files

Leverage the **Parse CSV** apex action to parse a CSV file into an Apex Defined variable for further processing. This process assumes:

- The file is .csv file format
- Data is double quote escaped
- File contains headers in the first row.

Variable	Required	Description
Convert Version	True	The content version which represents the csv files.

Outputs

Variable	Description
All Lines	Returns a list of parsedCSVLines.
IsSuccess	False if an error occurred during the process
ErrorMessage	If.IsSuccess is false, the error message

ParsedCSVLines

ParsedCSVLines is a custom apex defined variable that contains the following data points.

Variable	Description
Line	Line number that corresponds to the csv file.
List ParsedCSVKeyValuePairs	ParsedCSVKeyValuePairs is a custom apex defined variable.

ParsedCSVKeyValuePairs

ParsedCSVKeyValuePairs is a custom apex defined variable that contains the following data points. This variable represents each column found in the csv file.

Variable	Description
Key	The file name based on the column header.

Value	The value contained in the csv file.
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Recommendations

A couple of recommendations before you get started.

Email-to-Case Flow Template

The delivered flow template is your starting base. If you plan on making modifications, do not edit the flow template. Instead, create a copy of the flow template and make all your edits there.

Email-to-Lead Flow Template

The delivered Email-to-Lead flow template is your starting base for implementing an Email-to-Lead process. If you plan on making modifications, do not edit the flow template. Instead, create a copy of the flow template and make all your edits there.

Errors and Fault Paths

All apex actions delivered by Email-to-Flow include an isSuccess and Error Message output variable. It is highly recommended that these output variables (along with standard Fault Paths) are leveraged in your final solution. As each instance can have their own fault path strategy, the default flow(s) have been set up without fault paths.

File Wipe

File Wipe eliminates (or renames) email signatures, social media icons and social media logos from inbound email messages. This results in less clutter and a smaller file storage footprint in your instance.

Query All Files

For optimal processing, ensure the File Wipe running user(s) has the Query All Files permission.

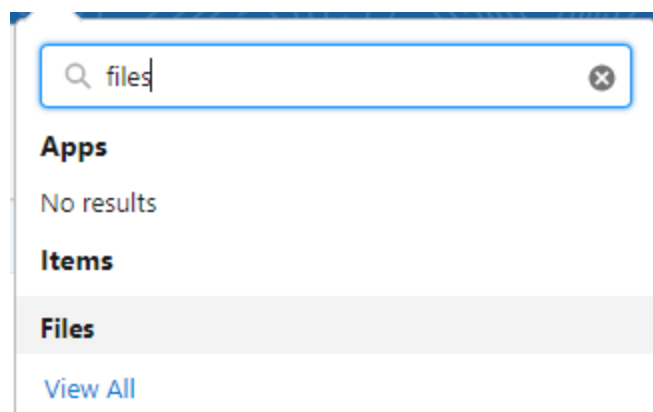
[Query All Files \(salesforce.com\)](https://help.salesforce.com/s/articleView?id=000000088)

File Wipe Configuration

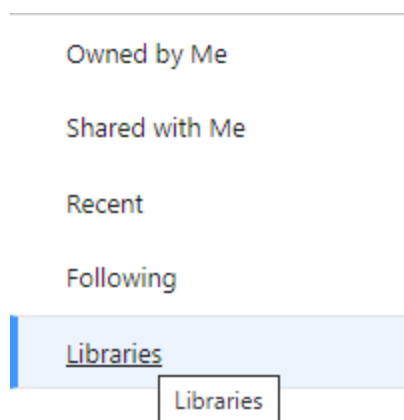
The File Wipe functionality compares new email attachments against a library of known files. When the contents of an email attachment matches a file in the File Wipe library, the appropriate action is taken.

Create a File Wipe Library

Navigate to Files.



Navigate to Libraries



Create a new library. Remember the name.

Create a File Wipe Rules CMT

The File Wipe Rules define what and how to process files.

File Wipe Rule

File Wipe Rule Detail

	Label	Default	Edit Delete Clone
	File Wipe Rule Name	Default	
	Action	Purge	
	isActive	☒	
	Library Name	FileWipe	
	Named Credential		
	Wipe Inbound Emails	☒	
	Wipe Outbound Emails	☐	
	Created By	Sean Fielding, 8/23/2022, 5:09 AM	
			Edit Delete Clone

Field	Notes
Action	The action to take when a match is found. Purge: Remove the file completely. Rename: Rename the file based on the title in the library
Active	Indicates id the rule is active
Library Name	The name of the library which identifies the File Wipe files.
Named Credentials	The named credential available for retroactive audits. Ignore this value for real time implementations.
Wipe Inbound Emails	Indicates if the file wipe process should execute on incoming email.
Wipe Outbound Emails	Indicates if the file wipe process should execute on

	outgoing email.
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The File Wipe Rule will be configured differently depending on your specific implementation.

Implementing File Wipe

File Wipe has a number of configuration options. Choose the option that best fits your needs.

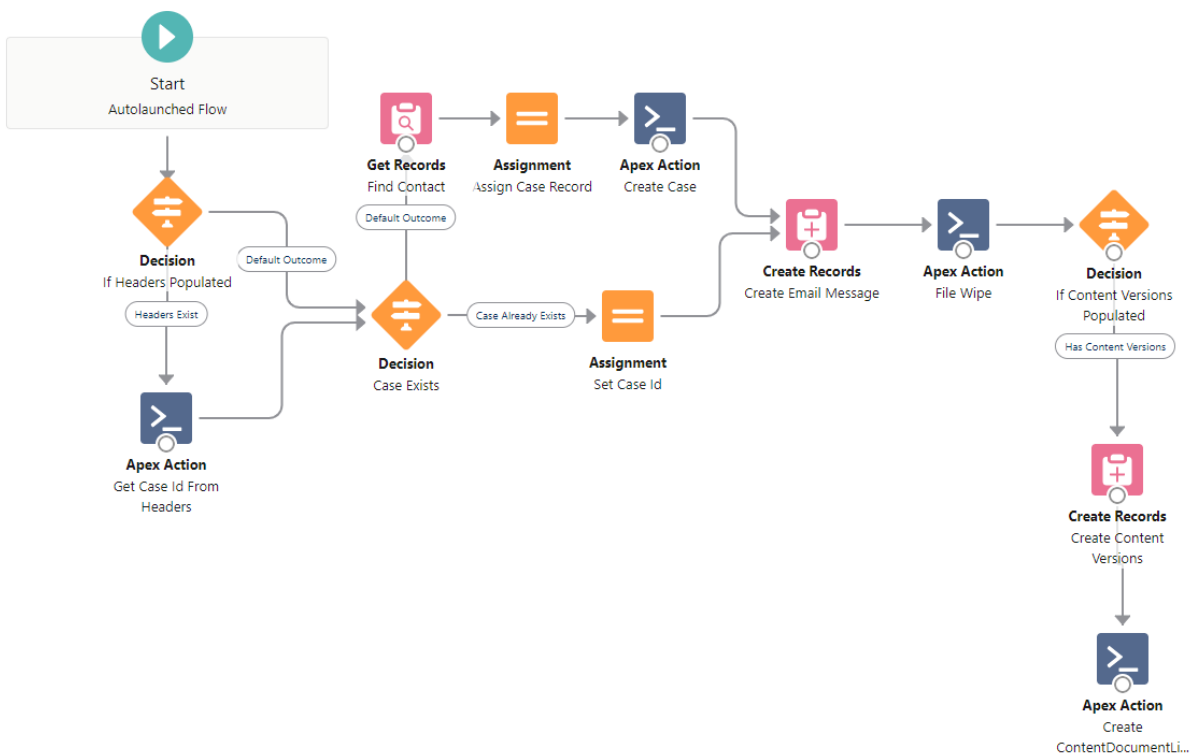
Real Time

The File Wipe functionality can be executed in real time. As an email is processed within your instance, the email attachments will be evaluated (and purged/renamed depending on the configuration).

Real Time via Email-to-Flow (Preferred)

Leveraging the File Wipe functionality within your Email-to-Flow process is the preferred implementation method. Implementing the File Wipe apex action within your email-to-flow process, ensures that email attachments are evaluated immediately.

The File Wipe Apex Action can be added to the flow process. Or, a version of Email-to-Case with File Wipe enabled is provided as a template (Email_to_case_with_File_Wipe).



Edit "E2F: File Wipe" Apex action

Use values from earlier in the flow to set the inputs for the "E2F: File Wipe" Apex action. To use its outputs later in the flow, store them in variables.

File Wipe (File_Wipe) 

Set Input Values

 * Email Attachments

 * File Wipe Rule

▼ [Advanced](#)

☒ Manually assign variables

Store Output Values

 contentVersions

 errorMessage
 

 isSuccess
 

Real Time via Trigger

The File Wipe functionality can also be implemented as a trigger. Use this configuration if you purchased this package solely for the File Wipe functionality.

The trigger requires a File Wipe Rule CMTD record with a name of label set to **EmailMessageTrigger**. Set up the CMTD as needed and confirm that the isActive checkbox is checked.

Retroactive Batch

The File Wipe functionality can be executed in batch mode. When scheduled, the batch retroactively removes files that match the File Wipe library.

Configure the RetroBatch File Wipe Rule CMTD to control the logic in the batch.

File Wipe Rule

File Wipe Rule Detail		Edit	Delete	Clone
Label	RetroBatch			
File Wipe Rule Name	RetroBatch			
Action	Purge			
isActive	☒			
Library Name	FileWipe			
Named Credential	FileWipe			
Wipe Inbound Emails	☒			
Wipe Outbound Emails	☐			
Created By	Sean Fielding, 8/24/2022, 6:29 AM			
		Edit	Delete	Clone

In a typical implementation, both the real time and batch (running weekly) options are leveraged. The real time process deals with known files. The batch process retroactively addresses new files that are identified.

File Wipe Audit

The File Wipe Audit provides the ability to identify and flag files to be added to the File Wipe Library.

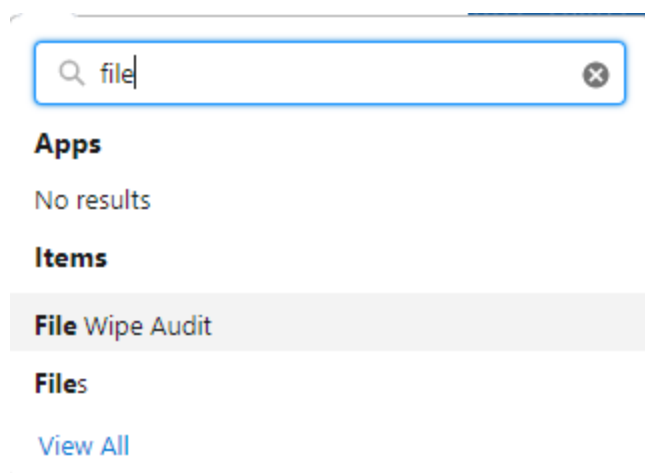
File Wipe Audit Activation

Navigate to Lightning App Builder.

Choose View for the **File Wipe Audit** Lightning Page.

Choose **Activation**. Choose your configuration options.

Navigate to the File Wipe Audit app.



Set your search criteria:

Criteria	Notes
Occurences	Set the minimum number of duplicates for a specific file
Min Content Size	Set the minimum content size
Max Content Size	Set the maximum content size. A typical email signature is under 20000
Limit	Set the the limit to only retrieve the first X number of records with the most duplicates
File Types	Filter by file type

The default values for these filters are maintained in the File Wipe Audit Parameter CMTD.

File Wipe Audit Parameter

File Wipe Audit Parameter Detail

[Edit](#) [Delete](#) [Clone](#)

	Label	Default
File Wipe Audit Parameter Name		Default
File Types		PNG,GIF,TIF,TIFF,BMP,JPG,JPEG
isActive		☒
Limit		10
Max Content Size		20,000
Min Content Size		0
Occurrences		1
Created By		<u>Sean Fielding</u> , 8/23/2022, 4:51 AM

[Edit](#) [Delete](#) [Clone](#)

Note: In order for the File Wipe Audit to work properly, a Connected App is required. Please set up a Connected app according to [Salesforce to Salesforce Integration Setup Quick Start](#).

Enhancements

We are constantly looking for ways to improve and extend the Email-to-Flow application. If you have additional requirements/ideas/suggestions for the app, feel free to ping us at sean@sproketlogic.com. As an Email-to-Flow client, any enhancements to the application will be included in releases and generally available.

That's it

That's it. You are ready to take control over your email services via flow!

More Information

For more information, check out our blog posts and recipes at

[Introducing Email-To-Flow, a low-code Email Service](#)