

# Salesforce Flows: Automate Birthday Wishes: A Step-by-Step Guide

Worried about forgetting your friend's birthday, I have a solution for you! With the power of Salesforce flows, *automating* birthday reminders has never been easier. In this blog post, we'll explore how to set up a Salesforce flow to send birthday greetings to friends or contacts stored in our Salesforce org.

We will need to store information about our friends, including their *email addresses* and *dates of birth* in our *Salesforce Org*. This could be useful for sending personalized birthday wishes, be manually remembering and sending these messages can be time-consuming. That's where Salesforce flows come in handy. With flows, you can automate repetitive tasks like sending birthday reminders, freeing up your time for more meaningful work.

Setting up the Flow:

Let's dive into the step-by-step process of setting up a Salesforce flow for birthday reminders.

Step 1: Define the Object and Fields

First, ensure you have a custom object in Salesforce to store information about your friends. Let's call it "Friend\_\_c". Within this object, create fields for "Email\_\_c" to store email addresses and "DOB\_\_c" to store dates of birth.

Step 2: Create a Scheduled Triggered Flow

Navigate to the Flow Builder in Salesforce Setup and create a new flow. Choose the "Scheduled Trigger" type for the flow.

Step 3: Define the Schedule

Set the schedule to run daily or at a frequency that suits your needs. For birthday reminders, you might want the flow to run once a day.

Step 4: Query Records

Next, add an element to query records from the "Friend\_\_c" object where the date of birth matches the current date. This will retrieve records of friends whose birthdays are today.

#### Step 5: Loop through Records

Add a loop element to iterate through the queried records.

#### Step 6: Send Email

Within the loop, add an action to send an email to each friend whose birthday is today. Use the "Email\_\_c" field to get the recipient's email address and customize the email message with a personalized birthday greeting.

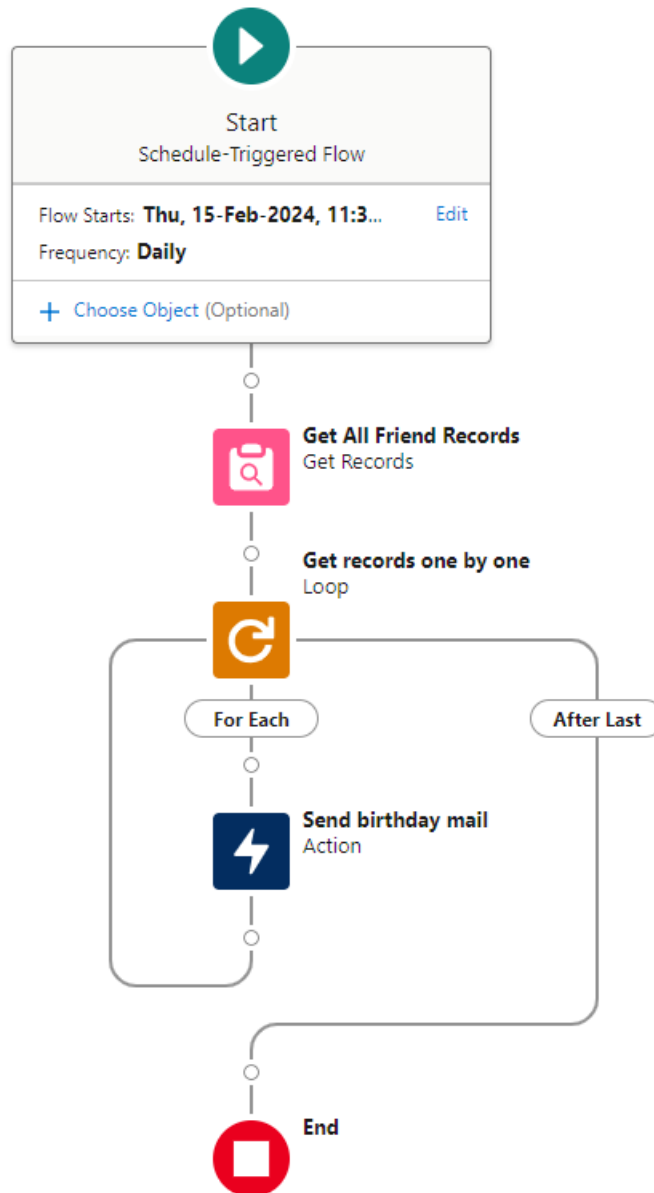
#### Step 7: Activate the Flow

Once you've finished configuring the flow, activate it to start sending birthday reminders automatically.

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Below are images supporting the blog that will give you a clear picture:


#### 1. Complete Flow





## 2. Schedule Flow

**Set a Schedule**

\* Start Date   \* Start Time  

Frequency  

### 3. Get Records

 Edit Get Records  
Get All Friend Records (*Get\_All\_Friend\_Records*) 

Get Records of This Object



\* Object  
Friend


Filter Friend Records

Condition Requirements  
All Conditions Are Met (AND)

Field  
DOB\_\_c

Operator  
Equals


Value  
 Current Date 



+ Add Condition

Sort Friend Records

Sort Order  
Not Sorted

 If you store only the first record, filter by a unique field, such as ID.

How Many Records to Store

☐ Only the first record  
☒ All records


How to Store Record Data

☐ Automatically store all fields  
☒ Choose fields and let Salesforce do the rest  
☐ Choose fields and assign variables (advanced)

Select Friend Fields to Store in Variable


Field  
ID


Field  
Email\_\_c



+ Add Field

### 4. Loop

 Edit Loop

Get records one by one (*Get\_records\_one\_by\_one*) 

Start a loop path for iterating over items in a collection variable. For each iteration, the flow temporarily stores the item in the loop variable.

Select Collection Variable

\* Collection Variable


{!Get\_All\_Friend\_Records}

Specify Direction for Iterating Over Collection

\* Direction


☒ First item to last item


☐ Last item to first item



To use the current item in other elements in the loop, use the API name of the Loop element.  
Example: if your flow iterates over accounts with a Loop element named "My\_Account\_Loop" you can reference the current item from that loop element. Just start typing "My\_Account\_Loop" and select "Current Item from Loop My\_Account\_Loop".




## 5. Action

 Edit Send Email

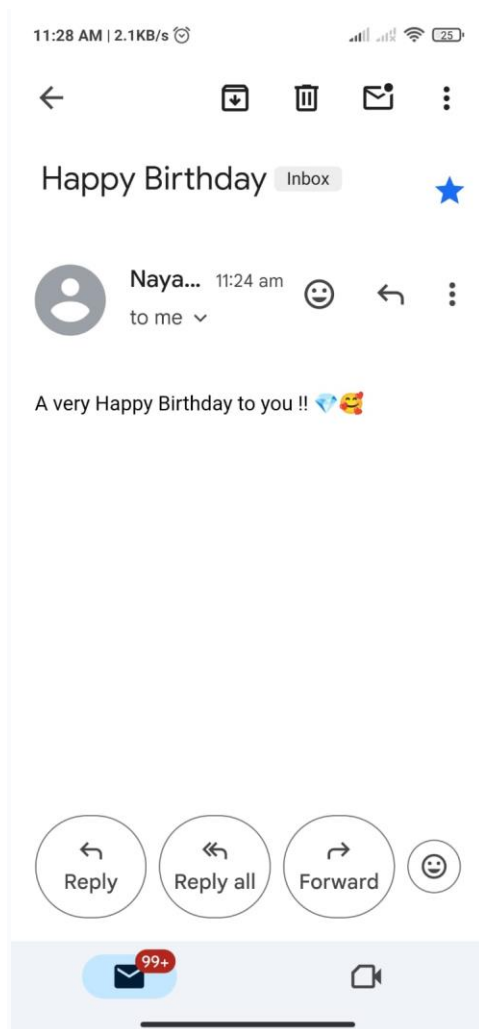
Send birthday mail (*Send\_birthday\_mail*) 

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

Set Input Values for the Selected Action

<div><div><div>A<sub>g</sub></div><div>Body</div><div></div></div></div>	<div><div><div></div><div>Include</div></div></div>
<div><div><div>A<sub>g</sub></div><div>Email Template ID</div><div></div></div></div>	<div><div><div></div><div>Don't Include</div></div></div>
<div><div><div></div><div>Log Email on Send</div><div></div></div></div>	<div><div><div></div><div>Don't Include</div></div></div>
<div><div><div>A<sub>g</sub></div><div>Recipient Address Collection</div><div></div></div></div>	<div><div><div></div><div>Don't Include</div></div></div>
<div><div><div>A<sub>g</sub></div><div>Recipient Address List</div><div></div></div></div>	<div><div><div></div><div>Include</div></div></div>
<div><div><div>A<sub>g</sub></div><div>Recipient ID</div><div></div></div></div>	<div><div><div></div><div>Don't Include</div></div></div>
<div><div><div>A<sub>g</sub></div><div>Related Record ID</div><div></div></div></div>	<div><div><div></div><div>Don't Include</div></div></div>
<div><div><div></div><div>Rich-Text-Formatted Body</div><div></div></div></div>	<div><div><div></div><div>Include</div></div></div>
<div><div><div>A<sub>g</sub></div><div>Sender Email Address</div><div></div></div></div>	<div><div><div></div><div>Don't Include</div></div></div>
<div><div><div>A<sub>g</sub></div><div>Sender Type</div><div></div></div></div>	<div><div><div></div><div>Don't Include</div></div></div>
<div><div><div>A<sub>g</sub></div><div>Subject</div><div></div></div></div>	<div><div><div></div><div>Include</div></div></div>
<div><div><div></div><div>Use Line Breaks</div><div></div></div></div>	<div><div><div></div><div>Don't Include</div></div></div>

## 6. Final Outcome



## Conclusion:

With Salesforce flows, automating birthday reminders for your friends or contacts is a breeze. By following the steps outlined in this blog post, you can set up a scheduled triggered flow to send personalized birthday greetings on their special day. Not only does this save you time, but it also helps you stay connected with your friends in a meaningful way. Harness the power of Salesforce flows to streamline your processes and make life a little bit easier.

Start automating your birthday reminders today and never miss another special day again!

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