Workflow Email Alerts

> Workflow Rules (along with Process Builders) are now on a deprecation / End-of-Life plan. Existing Workflow Rules will continue to operate for the foreseeable future, but in the near future (Winter 23) Salesforce will begin to prevent creating new Workflow Rules. Establish a plan to migrate to Flows, and create any new automation using Flow Builder.
>
> **Email Alerts are NOT part of the Workflow Rule deprecation plan- you can and should continue to configure and use Email Alerts. Flows can reference and execute these Email Alerts**

1. A Workflow Email Alert ***MUST*** Start with `EA`, followed by a number corresponding to the number of email alerts on the triggering Object.
2. A Workflow Email Alert ***SHOULD*** contain the Object name, or an abbreviation thereof, in the Field Update Name.
3. A Workflow Email Alert's Unique Name and Description ***SHOULD*** contain the exact same information, except where a longer description is absolutely necessary.[1]
4. A Workflow Email Alert ***SHOULD*** be named after the type of email it sends, or the reason the email is sent.
   Note that declaratively, the Name of the template used to send the email is always shown by default in Email Alert lists.

Examples

Object	EA Name	Description
Invoice	EA01_Inv_SendFirstPaymentReminder	EA01_Inv_SendFirstPaymentReminder.
Invoice	EA02_Inv_SendSecondPaymentReminder	SendSecondPaymentReminder
Contact	EA03_Con_SendBirthdayEmail	EA03_Con_SendBirthdayEmail

[1] Email Alert's Unique Names are generated from the Description by default in Salesforce. As Email Alerts can only send emails, this convention describes a less exhaustive solution than could be, at the profit of speed while creating Email Alerts declaratively.

Revision #3
Created 2019-07-07 10:15:55 UTC by Windyo
Updated 2022-02-21 05:50:27 UTC by Jeff Kranz