

Google Workspace Flows User Guide

Work **smarter** with automation

Describe tasks to get started

Create with AI

Browse templates

Email boosters

Task management

Meeting management

Connect your team

Customer connections

Email boosters

Google Workspace Flows (Closed Alpha) 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.

Step 1: Choose a Trigger

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

- **Gmail - When I get a message**
 - Triggers on incoming email with filters similar to your Gmail inbox search filters, settings:
 - Sender
 - To
 - Subject
 - Body contents (does or does not contain)
 - Size (greater or less than)
 - Has attachment
 - Label (predefined)
 - Include or exclude messages sent by flows
- **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

- **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

- **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

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 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.

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**
- Categorise
 - Use this step to get a list of categories that match the selected content. Outputs a **variable**
 - Enter the content to categorise
 - Add variables in the prompt by clicking **+ Variables** selector
 - Select or enter at least one category for Gemini to consider
 - Enter predetermined categories
 - Enter custom categories, separated by commas
 - Variable name: **Categorization result**
- Summarise 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 the emails**

- Ask a Gem
 - Use this step to ask a Gem to generate text to use in another step
 - 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.
 - 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**
- Write
 - Use this step to have Gemini draft content to use in another step, such as an email message or content for a doc
 - Select between the following writing tasks:
 - Answers to a question
 - Name the source of the questions
 - Add variables in the field by clicking **+ Variables** selector
 - Set the source for the answers, should be residing in Drive
 - Enter a prompt with instructions such as preferred style and tone, link to a template or example, or a reference for commonly asked questions. Prompts can be up to 1000 words. Only links to Drive items are supported.
 - Add variables in the field by clicking **+ Variables** selector
 - A reply to an email message
 - Set the source content
 - Add variables in the field by clicking **+ Variables** selector
 - Enter a prompt with instructions such as preferred style and tone, link to a template or example, or a reference for commonly asked questions. Prompts can be up to 1000 words. Only links to Drive items are supported.
 - Add variables in the field by clicking **+ Variables** selector
 - Use a prompt to write something else
 - Set the content to base the writing on
 - Add variables in the field by clicking **+ Variables** selector
 - Enter a prompt with instructions such as preferred style and tone, link to a template or example, or a reference for commonly asked questions. Prompts can be up to 1000 words. Only links to Drive items are supported.
 - Add variables in the field by clicking **+ Variables** selector
- Extract
 - Use this step to have Gemini analyse content and extract info to use in another step, such as action items, urgency, or questions to answer

- Select what to extract:
 - Action items
 - Select content to analyse
 - Add variables in the field by clicking **+ Variables** selector
 - Questions to answer
 - Select content to analyse
 - Add variables in the field by clicking **+ Variables** selector
 - Sentiment: tone, urgency, and action items
 - Select content to analyse
 - Add variables in the field by clicking **+ Variables** selector
- 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

- Use a prompt to summarise something else
 - 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

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

- 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

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.

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

Advanced Features and Tips

- **Conditional Logic:** Not yet available in Closed Alpha.
- **Loops:** Not yet available in Closed Alpha.
- **Error Handling:** Not yet available in Closed Alpha.
- **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:** Not yet available in Closed 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.

Google Workspace Flows is currently in Closed Alpha, but shows promise in transforming the way you work, to automate mundane tasks, and letting you focus on what truly matters.



Mikael Klambro | mike@seamrog.ie

Digital Transformation Consultant | Egoiste