

Salesforce Email Alerts and Notifications: Setup Patterns and Troubleshooting

TROUBLESHOOTING

A declarative, step-by-step troubleshooting checklist for Salesforce admins and developers.

Stop hunting 'ghost' email alerts in Salesforce. If your Flow runs but the inbox is empty, here is the exact 4-step diagnostic checklist to find the failure in minutes.

1 Inside the Salesforce Email Pipeline

Before troubleshooting, understand the four checkpoints where messages get blocked or dropped between the triggering event and the user's inbox.

- ✦ Trigger Evaluation: Did the automation criteria actually evaluate to true?
- ✦ Recipient Resolution: Is the recipient an active user with a valid email address?
- ✦ Template Rendering: Are merge fields valid and populated on the triggering object?
- ✦ Deliverability Settings: Is the org's access level restricted (e.g., System Email only)?

2 Reliable Email Alert Setup Pattern

Build your alerts systematically to prevent common errors like broken merge fields or hardcoded inactive recipients.

- ✦ Step 1: Create the template first with object-specific merge fields to prevent rendering errors.
- ✦ Step 2: Create the action using dynamic roles or related user fields, not hardcoded emails.
- ✦ Step 3: Reference the alert in Flow Builder or your legacy automation.
- ✦ Step 4: Activate your automation and verify entry criteria in a test environment.

3 Testing Delivery in Sandboxes

Sandboxes default to 'No Access' or 'System Email Only'. Always verify your environment's deliverability settings before debugging your flows.

- ✦ Navigate to Setup -> Email Administration -> Deliverability.
- ✦ Set Access level to 'All Email' for testing custom notifications.
- ✦ Use Salesforce Email Log Files to verify if the mail server processed the message.
- ✦ Check recipient spam folders and internal corporate mail filters.