



LET'S START YOUR FNF AUTOMATION PROJECT IN WORKATO



PART 1: GOOGLE SHEET SETUP (This is your data source)

◆ Step 1: Create a Google Sheet

1. Open <https://sheets.new>
2. On top-left, click the “Untitled spreadsheet” text.
3. Rename it to `FnF_Automation_Master`

◆ Step 2: Create Columns (Headers)

In **Row 1**, copy and paste these headers (in this exact order):

```
pgsql
CopyEdit
Employee Name | Work Email | Personal Email | LWD | Resignation Accepted |
Asset Issued | Asset Returned | Status | Reminder 1 | Reminder 2 | Legal
Notice | Clearance Status | Dues (₹) | Net Settlement | Final Payout Status
```

◆ Step 3: Add Sample Data

In **Row 2**, paste this:

```
yaml
CopyEdit
John Paul | john@company.com | john123@gmail.com | 2025-07-10 | No | Yes |
No | Not Started | | | Pending | 2500 | | Not Started
```

✅ Keep this sheet open — Workato will read and write to this.



PART 2: CREATE A WORKATO RECIPE

◆ Step 1: Go to Workato

1. Visit: <https://www.workato.com>
2. Log in using your Google account (top-right)

◆ Step 2: Create a New Recipe

1. On left panel, click **“Recipes”**
 2. Click the **“+ Create recipe”** button
 3. Fill in:
 - **Recipe name:** `FnF Automation`
 - **Folder:** `My Recipes` (or any folder)
 4. Click **Create recipe**
-

PART 3: CONFIGURE TRIGGER (Run it daily)

◆ Step 1: Add the Trigger

1. You'll see: **“What triggers this recipe?”**
2. Click inside the search box → `Type: Scheduler`
3. Select: **Scheduler**
4. Under Events, choose: **New scheduled event**
5. Click **Next**

◆ Step 2: Set the Schedule

1. Frequency: `Daily`
2. Time: Set any time (example: `09:00 AM`)
3. Click **Next**
4. Click **Start building**

✅ This means your automation will run every day at 9 AM.

PART 4: FETCH EMPLOYEE DATA FROM GOOGLE SHEETS

◆ Step 1: Add Action – Search Rows

1. Click the **“+”** below the trigger block
2. In the **“Search for app”** box, type `Google Sheets`
3. Select: `Google Sheets`
4. Choose action: `Search rows`
5. Click **Next**

◆ Step 2: Connect Your Google Account

1. Click: **Connect an account**

2. Choose your Gmail (the same one you used for Google Sheets)
3. Allow permissions
4. Once connected, click **Next**

◆ **Step 3: Choose the Sheet**

1. Spreadsheet: Select `FnF_Automation_Master`
2. Worksheet: Select `Sheet1`
3. Leave Search Conditions blank (we want all employees)
4. Click **Next**

✅ This step will fetch all employees listed in your Google Sheet.

PART 5: PROCESS EACH EMPLOYEE (REPEAT ACTION)

◆ **Step 1: Add Loop**

1. Click the “+” below your Search Rows action
2. Click: “**Repeat action**”
3. Choose: **For each row in Search rows**
4. Click **Next**

✅ You are now inside a loop that will process each employee one by one.

PART 6: REMINDERS AND ACTIONS BASED ON DATE

◆ **Step 1: Add Condition – Reminder 1 (1 day before LWD)**

1. Inside the loop, click the “+”
2. Click: “**If condition**”
3. In the left box, type: `LWD`
4. In the condition, choose “**Equals**”
5. Click the small fx icon (function) on the right
6. Enter formula:

```
sql
CopyEdit
format_date(today()) == format_date(date_add(row['LWD'], -1, 'days'))
```

7. Click **Done**

✓ This means "if today is 1 day before LWD"

◆ Step 2: Send Reminder Email to Employee

1. Inside the IF block, click the “+”
2. Choose App: Gmail
3. Action: Send email
4. To: {{row['Work Email']}}
5. Subject: Reminder: Submit Attendance and Allowances before LWD
6. Body:

```
css
CopyEdit
Dear {{row['Employee Name']}},

Please ensure all attendance and allowance updates are completed
before {{row['LWD']}}.

Regards,
HR Team
```

◆ Step 3: Update Sheet – Mark Reminder 1 Sent

1. Click “+” below Send Email
2. App: Google Sheets
3. Action: Update row
4. Row ID: Use {{row['ID']}}
5. Set: Reminder 1 = Sent

✓ This avoids repeating the same reminder tomorrow.

◆ Step 4: Add More Conditions

Repeat the above 3 steps for:

✓ Checklist on LWD

- Condition: today = LWD
- Send email with checklist
- Update: Reminder 2 = Sent

✓ Asset not returned → Send Recovery Emails

- Date: LWD + 7, +14, +21
- Condition: Asset Returned = No

- Send to: {{row['Personal Email']}}
- Update: Legal Notice = Reminder X Sent

✅ On LWD + 32 → Send Legal Notice

- Use same method
- Subject: Final Legal Notice - Unreturned Assets
- Body: Include firm legal tone



PART 7: HANDLE FINAL FNF CALCULATIONS

◆ Step 1: If Today = LWD + 6 → Prepare Draft

1. Use “If condition”:

```
sql
CopyEdit
format_date(today()) == format_date(date_add(row['LWD'], 6, 'days'))
```

2. Inside IF:

- Use Formatter → Compose text
- Text:

```
css
CopyEdit
Name: {{Employee Name}}
Dues: ₹{{Dues (₹)}}
Asset Status: {{Asset Returned}}
Clearance: {{Clearance Status}}
```

3. Send this via Gmail → Send email to finance@example.com

◆ Step 2: Auto-Calculate Net Settlement

1. Add condition:
 - If Dues < 3000 → Update Net Settlement = 0 (Write-off)
2. Else → Subtract Dues from Total Payable (manually, or using formula if you add columns)
3. Update Google Sheet with:
 - Net Settlement
 - Final Payout Status = Paid OR Recovery Needed



PART 8: USE AI (OPTIONAL)

1. Add action: OpenAI → Generate text
2. Prompt:

```
nginx
CopyEdit
Write a final legal email to {{Employee Name}} about not returning
assets by {{LWD + 32}}.
```

3. Use that output as email body in Gmail step

PART 9: FINAL ACTIONS & MONITORING

- On LWD + 16 to 31 → Daily check if asset is returned
- If not, keep sending daily check logs (Workato can monitor)
- After LWD + 32, set “Asset Not Returned” flag and calculate depreciated cost (manually entered into sheet)

PART 10: CREATE DASHBOARD IN SHEET

- Tab 2: Dashboard
- Add formulas:
 - =COUNTIF(H2:H, "Not Started")
 - =COUNTIF(H2:H, "In Progress")
 - =COUNTIF(O2:O, "Paid")
- Create bar chart showing status counts

That’s it, Espin. This is your **entire winning project built in Workato step-by-step**, covering:

- Scheduling
- Data fetching
- Conditional logic
- Emails
- Sheet updates
- Optional AI
- Status dashboards