



# OVERVIEW

Tool	Purpose
Google Sheets	Store employee data and track status
Workato	Build automations (called "recipes")
Gmail	Send emails
OpenAI (inside Workato)	Generate AI-powered emails (for legal notices, etc.)



## DATA FILE YOU WILL USE

You will only use this one file (already generated earlier):



FnF\_Automation\_Master.xlsx



## FULL STEP-BY-STEP GUIDE



### STEP 1: PREPARE GOOGLE SHEET

#### 1. Open the sheet

- Upload the Excel file to your Google Drive
- Right-click → Open with → **Google Sheets**
- Click **File** → **Save as Google Sheets**
- Rename it as: FnF\_Automation\_Master



Done. Keep this tab open — Workato will connect to this sheet.



### STEP 2: CREATE WORKATO ACCOUNT & START A RECIPE

#### 1. Open Workato

- Go to: <https://www.workato.com>
- Click **Sign Up**
- Choose “**Sign up with Google**”
- Select your Google account (same as your Google Sheet)

## 2. Create a New Recipe

- From the left menu, click **Recipes**
  - Click + **Create Recipe**
  - Fill:
    - Name: FnF Automation Bot
    - Folder: My Recipes or default
  - Click **Create Recipe**
- 



## STEP 3: SET DAILY TRIGGER

### 1. Trigger Configuration

- Search for app: Scheduler
- Select: New scheduled event
- Click **Next**
- Set Frequency: Daily
- Time: Choose 09:00 AM
- Click **Next**
- Click **Start Building**



Now this recipe will run every morning automatically.

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## STEP 4: FETCH EMPLOYEE DATA FROM GOOGLE SHEET

### 1. Add Action: Search Rows

- Click the “+” button below the trigger block
- App: **Google Sheets**
- Action: **Search rows**
- Click **Next**

### 2. Connect to Google Account

- Click **Connect an account**
- Choose your Google account
- Allow permissions

- Click **Next**

### 3. Configure Google Sheets Access

- Spreadsheet: `FnF_Automation_Master`
- Worksheet: `Sheet1`
- Leave “Search conditions” blank
- Click **Next**

✅ Now Workato will read all employees listed in the sheet.

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## ✅ STEP 5: LOOP OVER EACH EMPLOYEE

### 1. Add Repeat Block

- Click the “+” under the `Search rows` step
- Select: **Repeat action**
- For each: `row in Google Sheets result`
- Click **Next**

Now, everything we do next will be inside this loop — for each employee one-by-one.

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## ✅ STEP 6: ADD IF CONDITION – LWD -1 REMINDER

### 1. Add IF condition

- Inside the loop, click “+”
- Choose: **If condition**
- Formula:

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

### 2. Inside that IF:

- Click “+”
- App: `Gmail`
- Action: **Send email**
- To: `{{row['Work Email']}}`
- Subject: `Reminder: Submit Attendance & Allowances before LWD`
- Body:

```
css
```

CopyEdit

Dear {{row['Employee Name']}},

Please make sure to submit all attendance and allowances before your last working day: {{row['LWD']}}.

Regards,  
HR Team

### 3. Update Sheet:

- Add Google Sheets → Update row
- Select the row using: {{row['ID']}}
- Set Reminder 1 = Sent

✅ This prevents resending the reminder again tomorrow.

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## ✅ STEP 7: SEND CHECKLIST ON LWD (LWD = Today)

Repeat the above with a new IF condition:

```
sql
CopyEdit
format_date(today()) == format_date(row['LWD'])
```

Inside that:

- Send Gmail with checklist (ID return, asset clearance)
  - Update: Reminder 2 = Sent
- 

## ✅ STEP 8: REMIND IF ASSET NOT RETURNED

Repeat this 4 times with IF conditions:

```
sql
CopyEdit
format_date(today()) == format_date(date_add(row['LWD'], X, 'days')) AND
row['Asset Returned'] == "No"
```

Where X = 7, 14, 21, 32

Inside each block:

- **Gmail → Send email**
  - To: {{row['Personal Email']}}

- **Subject:** Reminder: Please return company assets
- **Body:**

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

Our records show that you have not yet returned company assets post your last working day ({{row['LWD']}}). Kindly do so as soon as possible to avoid legal consequences.

```
Regards,
Asset Management Team
```

- **Update Sheet:** Legal Notice = Reminder X Sent

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## ✅ STEP 9: FINAL LEGAL NOTICE USING AI (MANDATORY)

### 1. IF: Today = LWD + 32 and Asset Returned = No

Use IF condition:

```
python
CopyEdit
format_date(today()) == format_date(date_add(row['LWD'], 32, 'days')) AND
row['Asset Returned'] == "No"
```

### 2. Add OpenAI Step (Inside IF)

- Click “+”
- App: **OpenAI**
- Action: **Generate text**
- Prompt:

```
css
CopyEdit
Write a formal legal email to {{row['Employee Name']}} who has not
returned company assets by 32 days after their LWD ({{row['LWD']}}).
Keep tone polite but firm.
```

### 3. Add Gmail Email

- Use OpenAI response in the **body**
- To: {{row['Personal Email']}}
- Subject: Final Legal Notice: Non-return of Company Property

✅ This is your AI-powered, smartly generated content!

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## ✓ STEP 10: FNF CALCULATION – ON LWD + 6

1. IF: `format_date(today()) == format_date(date_add(row['LWD'], 6, 'days'))`

### 2. Inside that:

- Add Formatter → Compose text
- Content:

```
css
CopyEdit
Name: {{row['Employee Name']}}
LWD: {{row['LWD']}}
Asset Returned: {{row['Asset Returned']}}
Dues: ₹{{row['Dues (₹)']}}
Clearance Status: {{row['Clearance Status']}}
```

- Add Gmail → Send email to:
  - To: `finance@company.com`
  - Subject: `FNF Input for {{row['Employee Name']}}`
  - Body: Use composed text

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## ✓ STEP 11: FINAL SETTLEMENT STATUS

### 1. Add IF conditions:

- If `Dues < 3000` → Auto write-off
- If `Dues > Net Payable` → Negative settlement
- Else → Mark as Paid

### 2. Gmail for positive:

- Subject: `Your F&F Settlement has been processed`
- Body:

```
css
CopyEdit
Dear {{row['Employee Name']}},
Your Full & Final Settlement has been processed. Net Amount:
₹{{row['Net Settlement']}}.
```

```
Regards,
HR Payroll
```

### 3. Gmail for negative:

- Ask them to transfer remaining amount to company account
  - If still unpaid after 7+7 days → flag as **Delinquent**
- 

## ✓ STEP 12: SHEET UPDATES

Every time you:

- Send reminder
- Send legal notice
- Mark final payout

→ Always add a Google Sheets → Update Row action to record the action (ex: Status = Paid, Legal Notice = Sent, etc.)

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## ✓ BONUS: DASHBOARD (IN GOOGLE SHEET)

Create a new tab called `Dashboard`. Add:

Metric	Formula
Total Employees	<code>=COUNTA(A2:A)</code>
In Progress	<code>=COUNTIF(H2:H, "In Progress")</code>
Completed	<code>=COUNTIF(O2:O, "Paid")</code>
Delinquent	<code>=COUNTIF(O2:O, "Delinquent")</code>

✓ Add pie/bar charts using Insert → Chart

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## ✓ WHAT YOU'VE BUILT NOW:

- ✓ Daily automated schedule
- ✓ Employee-wise loop
- ✓ LWD reminders and checklist
- ✓ Asset return tracking
- ✓ AI-powered legal email
- ✓ FNF file generation and finance alert
- ✓ Positive/negative payout logic
- ✓ Smart sheet tracking and dashboard