🧠 Project Recap:

You're building:
👉 **AI-Powered Full & Final Settlement Automation**
👉 For a company hackathon (winning = placement!)

🛠️ TOOLS YOU'LL USE:

Tool	Purpose
Workato	To build automations (recipes)
Google Sheets	To store employee & F&F data
Gmail (or Outlook)	To send reminder/legal emails
OpenAI (optional)	To auto-write emails
SharePoint/DB (optional)	To check if asset is returned

✅ OVERVIEW: What Your Automation Will Do

Step	Action
1	Pull list of employees who resigned
2	Store data in a Google Sheet
3	Automatically send reminders based on LWD
4	Check asset return status
5	If not returned by LWD + 7, send legal notice
6	Prepare F&F Input and send to Finance
7	Update status in Google Sheet

🚦 BEFORE YOU START: Get These Ready

What You Need	How to Get It
✅ Google Account	Go to [Google](#) → Sign in or create
✅ Gmail (for sending emails)	Same as Google account
✅ Google Sheet	Create from Google Drive

What You Need	How to Get It
✅ Workato Free Trial	Go to https://www.workato.com/signup → Sign up

✅ LET'S BEGIN: STEP-BY-STEP

🔷 STEP 1: Create Google Sheet

Go to https://sheets.new and name it `FNF Automation Sheet`

Add these column headers in Row 1:

```
nginx
CopyEdit
Name | Email | LWD | Asset Issued | Reminder1 | Reminder2 | LegalNotice |
Status
```

Fill 1-2 fake employee rows for testing:

```
yaml
CopyEdit
John Paul | john@gmail.com | 2025-07-10 | Yes | | | | Not Started
```

Keep this Sheet open.

🔷 STEP 2: Create a Workato Recipe

1. Go to https://www.workato.com
2. Sign in or Sign up
3. From Dashboard → Click **"Create a new Recipe"**
4. Name: `FNF Reminder & Automation`
5. Choose the **trigger app**:
    - o Type: `Schedule`
    - o Click: `Scheduler → New scheduled event`
    - o Choose: **Daily**

Click **Start building**

🔷 STEP 3: Add Action to Read from Google Sheet

1. Click **"+" (Add a new action)**

2. Choose App: `Google Sheets`
3. Click **"Search Rows"**
4. Connect your Google account
5. Choose the `FNF Automation Sheet`
6. Choose the worksheet (e.g., `Sheet1`)
7. Leave search condition blank (we want all data)
8. Click **Next**

✅ Now the recipe will pull all resignations daily.

🔷 STEP 4: Filter Rows Based on Today's Date

Now we'll check if today = LWD - 3 or LWD + 3 etc.

1. Click **"+"** → **Add a Conditional Step**
2. Click **"Conditions"**
3. Set condition like this:

```csharp
CopyEdit
If (LWD is 3 days from Today) → Send reminder
```

Here's how:

- Choose `LWD` from the row
- Use formula: `LWD = today + 3 days` or `LWD = today - 3 days`

Repeat this condition logic for:

- Reminder 1: `Today = LWD - 3`
- Reminder 2: `Today = LWD + 3`
- Legal Notice: `Today = LWD + 7` AND `Asset Issued = Yes`

🔷 STEP 5: Send Reminder Emails

Inside each condition, add action:

1. Click `+` → `Add Action`
2. Choose App: `Gmail` or `Outlook`
3. Choose: `Send Email`
4. To: `{{Row.Email}}`
5. Subject:
   - "F&F Reminder: Action Needed Before {{LWD}}"
6. Body:

```kotlin
CopyEdit
Dear {{Row.Name}},
Please ensure you return your company assets by {{LWD}} for smooth
Full & Final settlement.
Regards, HR
```

✅ Repeat this for 2nd reminder and legal notice.

🔷 STEP 6: Update Status in Google Sheet

After sending email:

1. Add Action: `Google Sheets → Update Row`
2. Select the row using the ID
3. Set `Reminder1, Reminder2,` or `LegalNotice` = "Sent"
4. Set Status = "In Progress" or "Legal Triggered"

🔷 STEP 7: Prepare & Send F&F Input

After final email sent:

1. Add Action: `Formatter → Compose text`
   Example body:

   ```yaml
   CopyEdit
   Name: {{Row.Name}}
   Last Working Day: {{Row.LWD}}
   Assets Returned: No
   Legal Reminder Sent: Yes
   ```

2. Add Action: `Gmail → Send Email`
   - To: `finance@example.com`
   - Subject: "Final F&F Input – {{Row.Name}}"
   - Body: Use formatted text

(Optional) 🔷 STEP 8: Use AI to Write Emails

1. Add action: `OpenAI → Generate Text`
2. Prompt:

   ```css
   CopyEdit
   ```

```
Draft a polite reminder to {{Row.Name}} for returning asset before
{{Row.LWD}}.
```

3. Use response in email body

🎯 Final Recipe Summary (Visual)

```plaintext
CopyEdit
[Scheduled Daily Trigger]
      ↓
[Read all rows from Google Sheet]
      ↓
[If Today = LWD - 3] → Send Reminder Email 1 → Update Sheet
      ↓
[If Today = LWD + 3] → Send Reminder Email 2 → Update Sheet
      ↓
[If Today = LWD + 7 AND Asset Not Returned] → Send Legal Email → Update
Sheet
      ↓
[If All Done] → Format F&F Input → Send to Finance → Update Status
```

🏁 You're Done!

You've just built your **first end-to-end automation in Workato**.