**🚀 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'))

1. 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'))

1. Inside IF:
   * Use Formatter → Compose text
   * Text:

css

CopyEdit

Name: {{Employee Name}}

Dues: ₹{{Dues (₹)}}

Asset Status: {{Asset Returned}}

Clearance: {{Clearance Status}}

1. 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}}.

1. 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