**🧠 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](https://www.google.com) → Sign in or create |
| ✅ Gmail (for sending emails) | Same as Google account |
| ✅ Google Sheet | Create from Google Drive |
| ✅ 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:

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Name | Email | LWD | Asset Issued | Reminder1 | Reminder2 | LegalNotice | Status

Fill 1-2 fake employee rows for testing:

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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**:
   * Type: Schedule
   * Click: Scheduler → New scheduled event
   * 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:

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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:

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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

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Name: {{Row.Name}}

Last Working Day: {{Row.LWD}}

Assets Returned: No

Legal Reminder Sent: Yes

1. 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:

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

1. Use response in email body

**🎯 Final Recipe Summary (Visual)**

plaintext

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[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**.