

# Client On-boarding Automation Project Salesforce

Created on November 3, 2025 by Kim Moser  
(Using Sample Data)

Salesforce features demonstrated include: setting up custom objects, lighting app builder, & flow (automation)

## Problem:

Manual Emails + Excel > 3 -day On-boarding delay

## Solution:

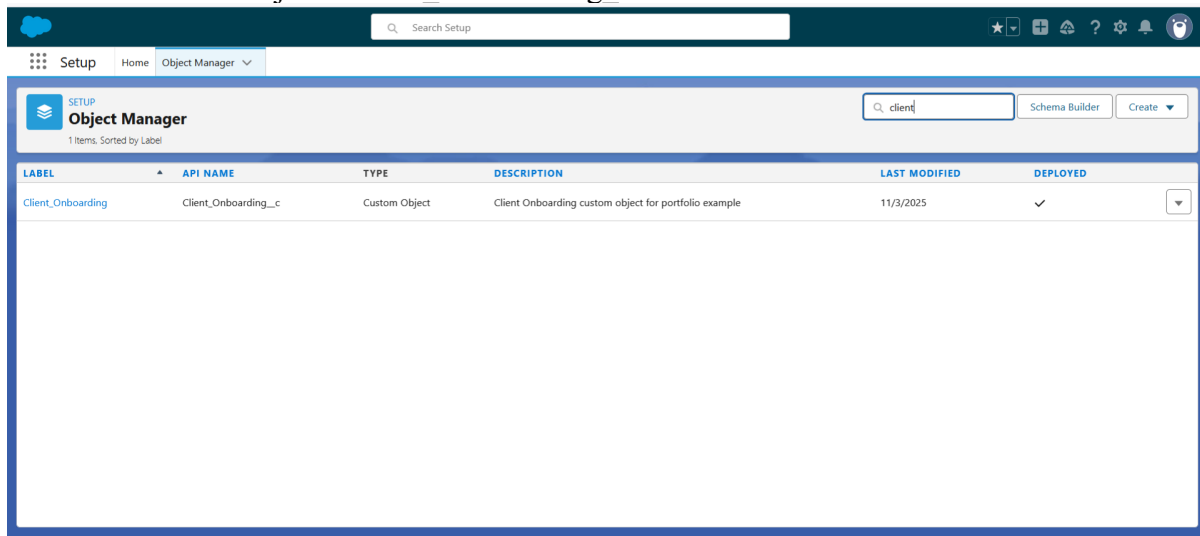
- Custom object: Client\_On-boarding\_c
- Picklist Status: New > Docs>Approved > Active
- Flow: Auto-email + task when status ="Docs approved"

## Impact

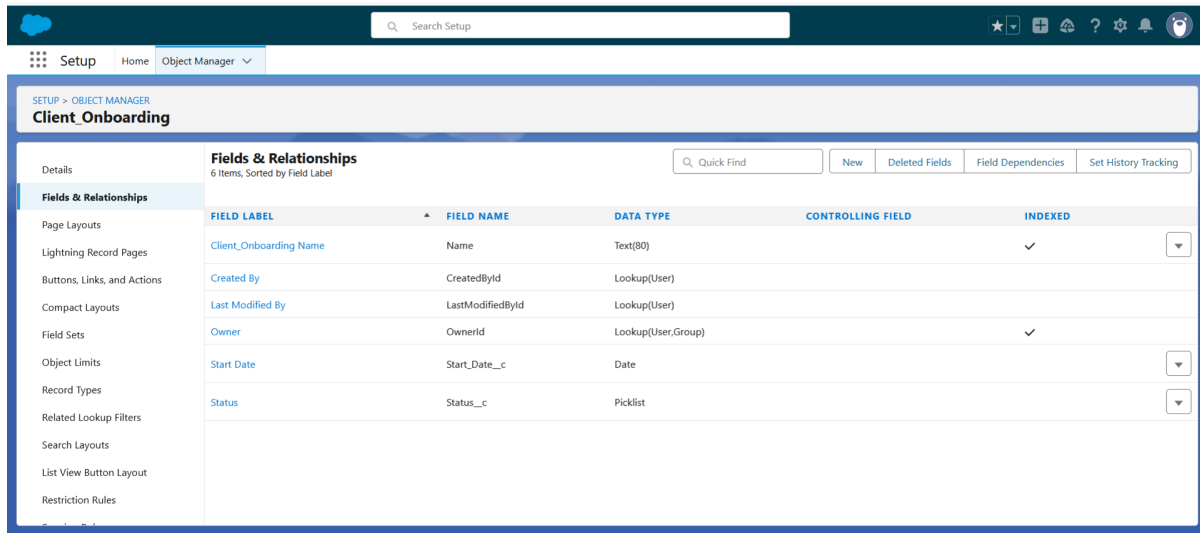
Reduced On-boarding from 3 days to 4 hours.

## Process:

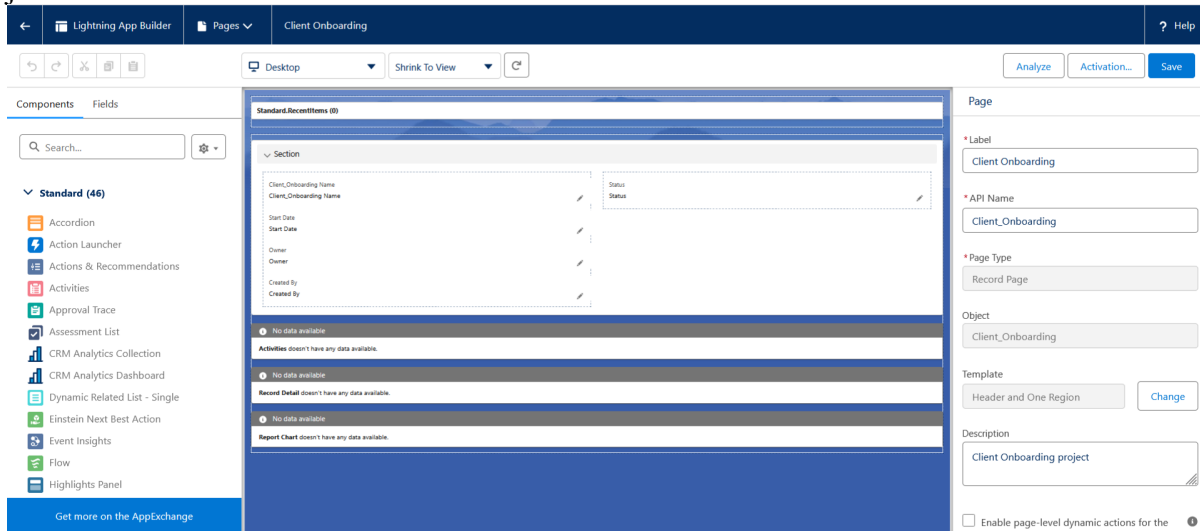
Created a Custom object "Client\_On-boarding\_c"



Created Key fields Status\_c picklist, Start Date, and Owner



Created new record page “Client On-boarding” in Lightning app builder using the new fields I just created above.



Flow created to generate an email alert to rep once a new client On-boarding record status is set to Docs approved

Flow Builder interface showing a Record-Triggered Flow configuration.

**Record-Triggered Flow Start**

- Object: Client\_Onboarding
- Trigger: A record is created
- Conditions: 1
- Optimize for: Actions and Related Records
- Scheduled Paths: 2

Flow Diagram:

```
graph TD; Start[Record-Triggered Flow Start] --> RunImmediately[Run Immediately]; Start --> RunAsynchronously[Run Asynchronously]; RunImmediately --> EmailAlert[Email alert Action]; EmailAlert --> End1[End]; RunAsynchronously --> End2[End];
```

**Configure Start**

Select Object: Client\_Onboarding

Configure Trigger:

Trigger the Flow When:

- ☒ A record is created
- ☐ A record is updated
- ☐ A record is created or updated
- ☐ A record is deleted

Set Entry Conditions:

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

Condition Requirements: All Conditions Are Met (AND)

Field: Status Operator: Equals Value: Docs Approved

Optimize Flow: Optimize the Flow for: Tips

Flow Builder interface showing the same Record-Triggered Flow configuration.

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**Record-Triggered Flow Start**

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```

Flow Builder interface showing the Tests tab.

**Tests**

Create

Test Label	Description	Created By	Last Modified Date	Last Run Date and Time	Result
Client onboarding test		Kim M	11/03/2025, 03:41 PM	11/03/2025, 03:41 PM	Pass

Cancel Run

Tested flow successfully, result = pass