

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:

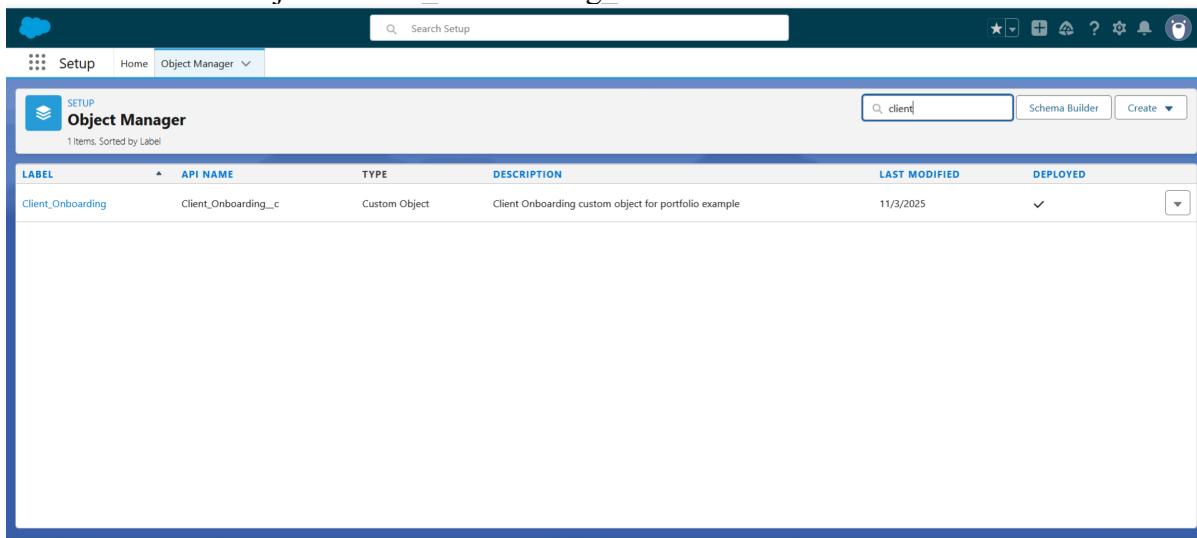
- Custom object: Client_On-boarding_c
- Picklist Status: New > Docs>Approved > Active
- Flow: Auto-email + task when status ="Docs approved"

Impact

Reduced On-boarding from 3 days to 4 hours.

Process:

Created a Custom object “Client_On-boarding_c”



The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'client' typed into it, and buttons for 'Schema Builder' and 'Create'. Below the header, the title 'Object Manager' is displayed with a note '1 Items. Sorted by Label'. A table lists the single item: 'Client_Onboarding' with API name 'Client_Onboarding_c', type 'Custom Object', and description 'Client Onboarding custom object for portfolio example'. The last modified date is '11/3/2025' and the deployed status is checked.

Created Key fields Status_c picklist, Start Date, and Owner

SETUP > OBJECT MANAGER

Client_Onboarding

Fields & Relationships

6 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Client_Onboarding Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Start Date	Start_Date__c	Date		
Status	Status__c	Picklist		

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

Lightning App Builder

Pages > Client Onboarding

Components Fields

Standard Recent Items (0)

Section

Client_Onboarding Name
Client_Onboarding Name
Start Date
Start Date
Owner
Owner
Created By
Created By

Page

*Label: Client Onboarding

*API Name: Client_Onboarding

*Page Type: Record Page

Object: Client_Onboarding

Template: Header and One Region

Description: Client Onboarding project

Enable page-level dynamic actions for the

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

Configure Start

Select Object
Object: Client_Onboarding

Configure Trigger
Trigger the Flow When:
A record is created

Set Entry Conditions
Condition Requirements: All Conditions Are Met (AND)

Field: Status Operator: Equals Value: A_Docs Approved

Optimize Flow
Optimize the Flow for:

Test Label	Description	Created By	Last Modified Date	Last Run Date and Time	Result
Client onboarding test	Kim M	11/03/2023, 03:41 PM	11/03/2023, 03:41 PM	Pass	

Tested flow successfully, result = pass