

# 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:

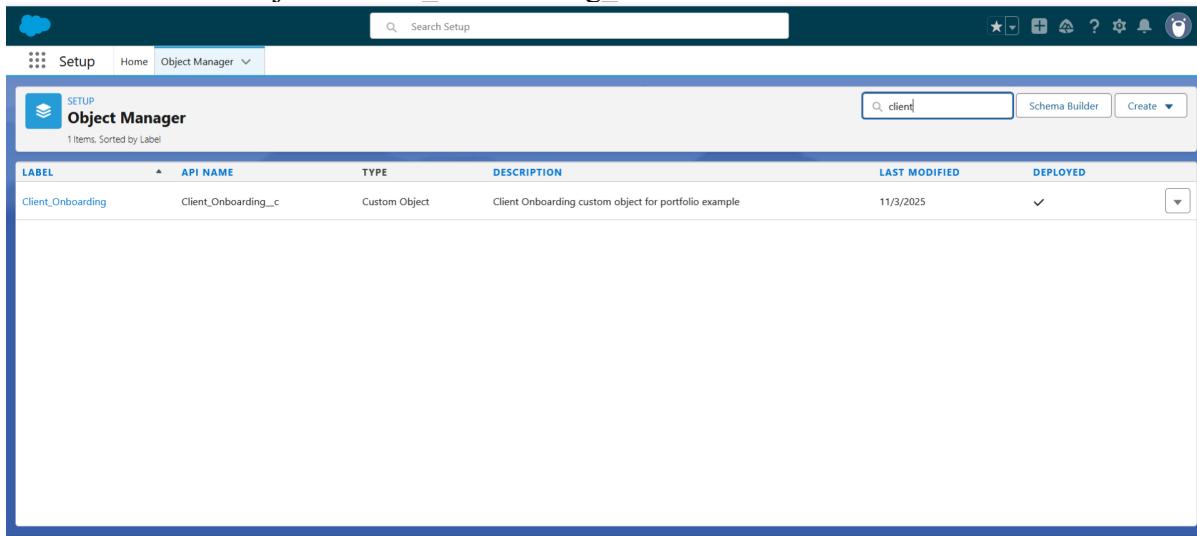
- Custom object: Client\_On-boarding\_c
- Picklist Status: New > Docs>Approved > Active
- Flow: Auto-email + task when status ="Docs approved"

## 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

The screenshot shows the Salesforce Lightning App Builder interface. At the top, there's a navigation bar with links like Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, Knowledge, and Client\_Onboarding. Below the navigation is a search bar and a toolbar with buttons for New, Import, Change Owner, Printable View, and Assign Label. A 'Recently Viewed' section is displayed, showing a single item: 'Client\_Onboarding Name' (1 item) updated a few seconds ago. The list contains one entry: 'Joe Smith'. There are also standard list controls like a search bar, filters, and a refresh button.

New “Client Onboarding” Record page I created in Lightning app builder

The screenshot shows the 'Client Onboarding' record page in the Lightning Experience. At the top, there's a navigation bar with links like Service, Home, Chatter, Accounts, Contacts, Cases, Reports, Dashboards, Knowledge, and Client\_Onboarding. Below the navigation is a toolbar with buttons for New Event, New Task, Log a Call, and Email. A sidebar on the left shows sections for Upcoming & Overdue tasks and November 2025 activities. The main content area displays the record details for 'Client Onboarding Name' (Joe Smith), 'Start Date' (11/28/2025), 'Status' (Docs Approved), and 'Owner' (Kim M). It also shows the last modified by Kim M on 11/4/2025 at 6:11 PM. A note indicates that no more past activities are loaded. The page includes a 'Filters' section and buttons for Refresh, Expand All, and View All.

Record was created and status was updated to “Docs Approved” and email alert was received as intended.

