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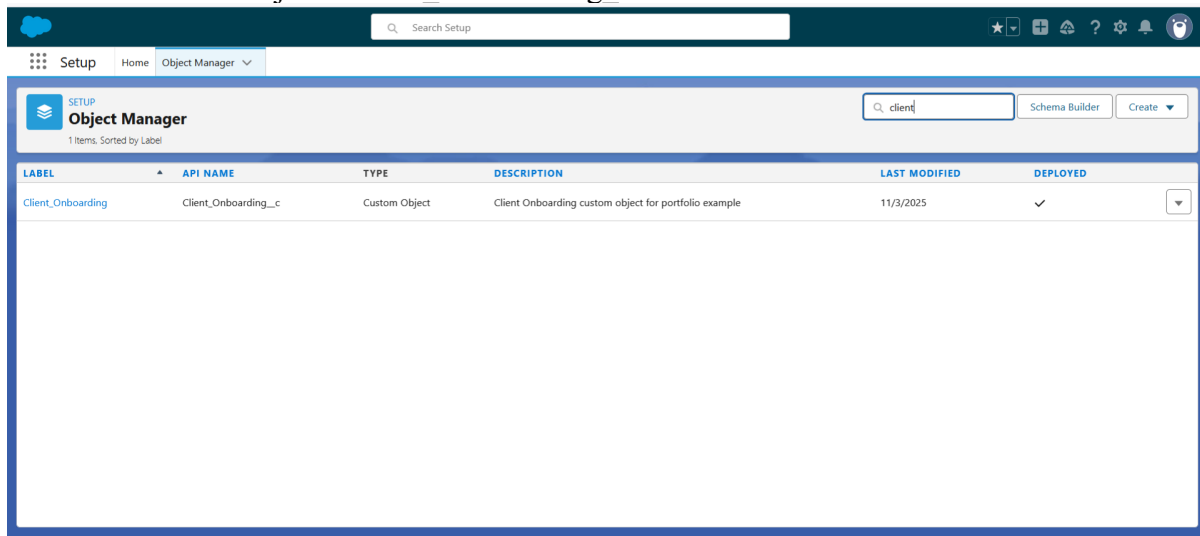Manual Emails + Excel > 3 -day On-boarding delay

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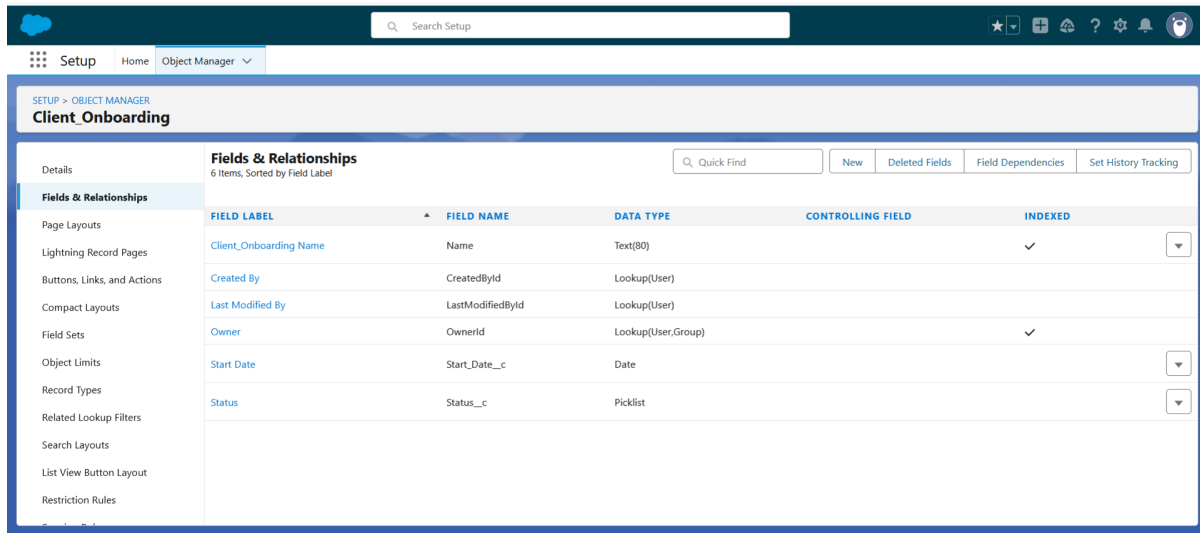- Flow: Auto-email + task when status ="Docs approved"

Impact
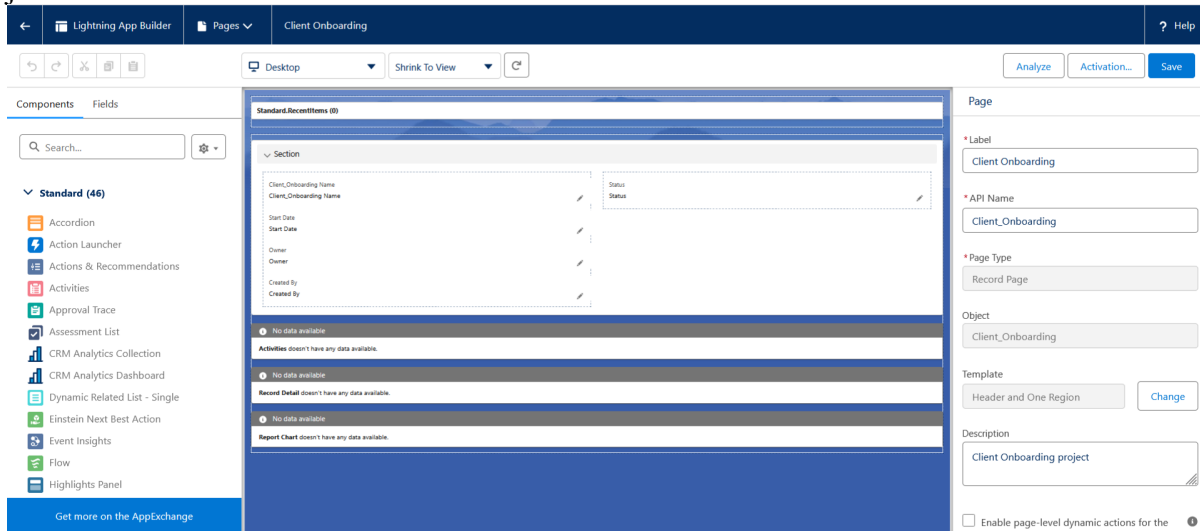Reduced On-boarding from 3 days to 4 hours.

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 Lighting 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

Tested flow successfully, result = pass