

# 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:

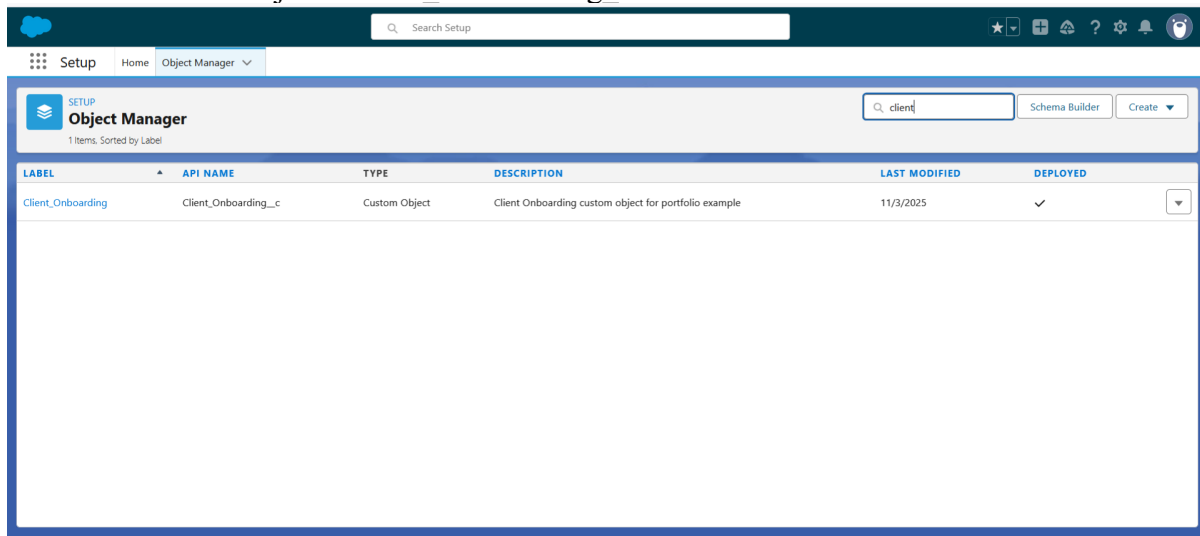
- Custom object: Client\_On-boarding\_c
- Picklist Status: New > Docs>Approved > Active
- Flow: Auto-email + task when status ="Docs approved"

## Impact

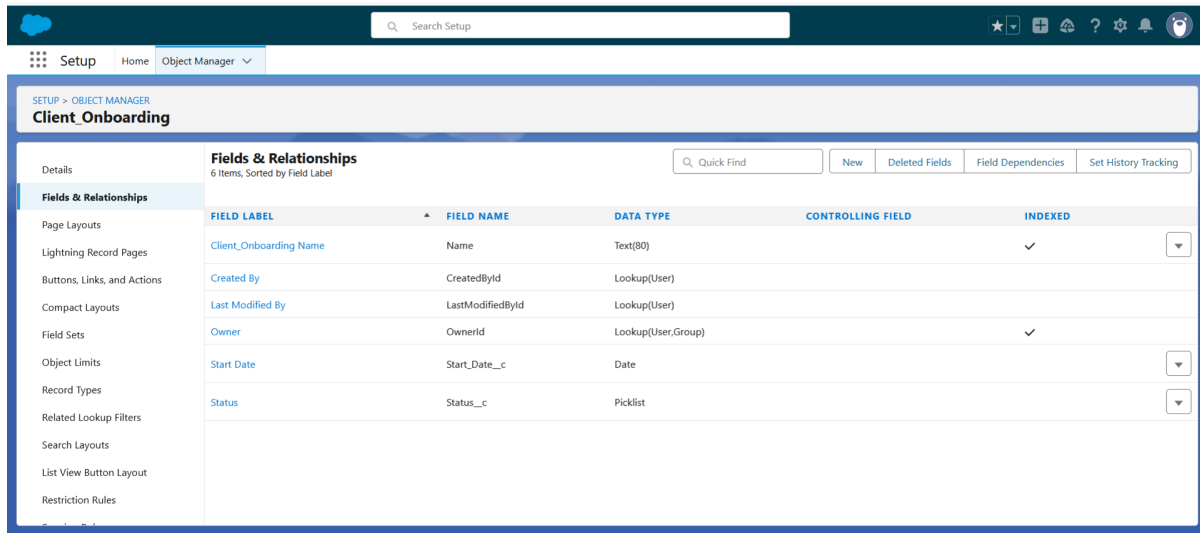
Reduced On-boarding from 3 days to 4 hours.

## Process:

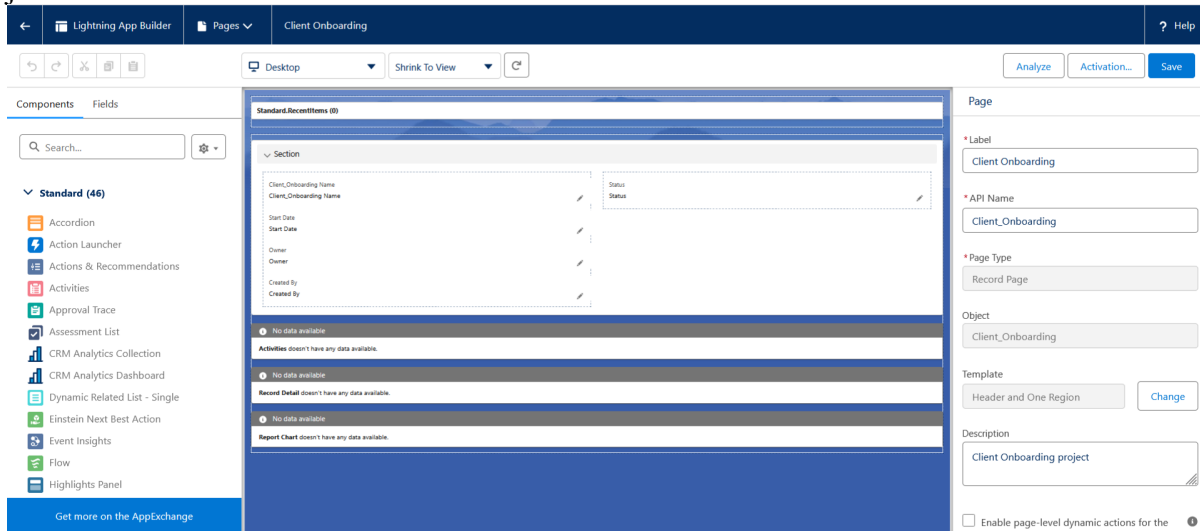
Created a Custom object "Client\_On-boarding\_c"



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

Record-Triggered Flow

Start

Object: Client\_Onboarding

Trigger: A record is created

Conditions: 1

Optimize for: Actions and Related Recor...

Scheduled Paths: 2

Open Flow Trigger Explorer for Client...

Run Immediately

Run Asynchronously

Email alert

Action

End

End

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

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

+ Add Condition

Optimize Flow

Optimize the Flow for:

Tips

Flow Builder

Client\_Onboarding - V1

Last saved on 11/3/2025, 03:30 PM

Active

Run

Debug

View Tests

Save As New Version

Save

Deactivate

Record-Triggered Flow

Start

Object: Client\_Onboarding

Trigger: A record is created

Conditions: 1

Optimize for: Actions and Related Recor...

Scheduled Paths: 2

Open Flow Trigger Explorer for Client...

Run Immediately

Run Asynchronously

Email alert

Action

End

End

Tips

Flow Builder

Client\_Onboarding - V1

Tests

Create

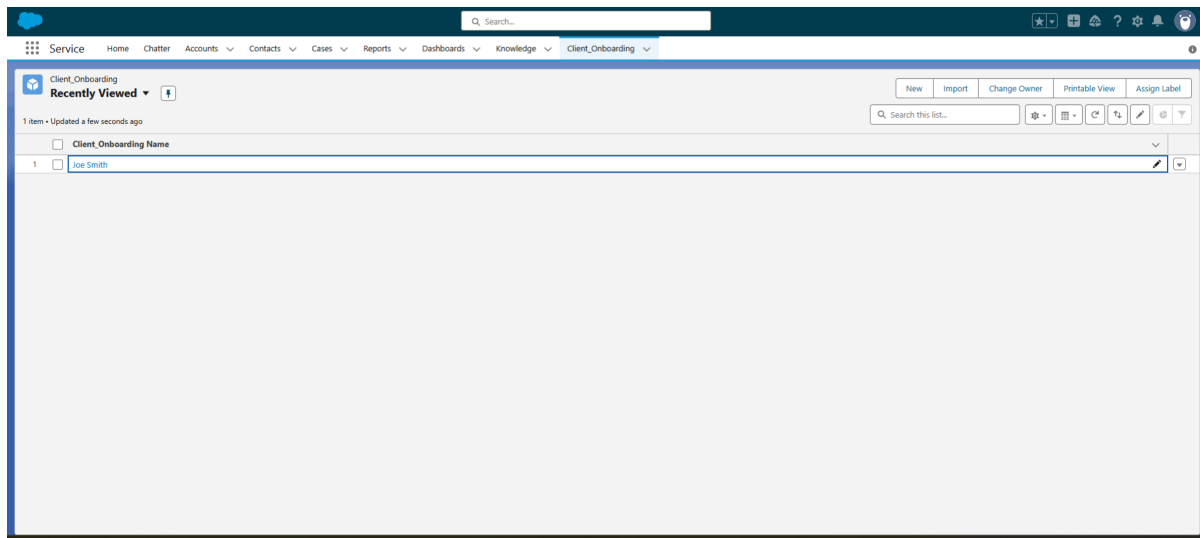
Test Label	Description	Created By	Last Modified Date	Last Run Date and Time	Result
Client onboarding test		Kim M	11/03/2025, 03:41 PM	11/03/2025, 03:41 PM	Pass

Cancel

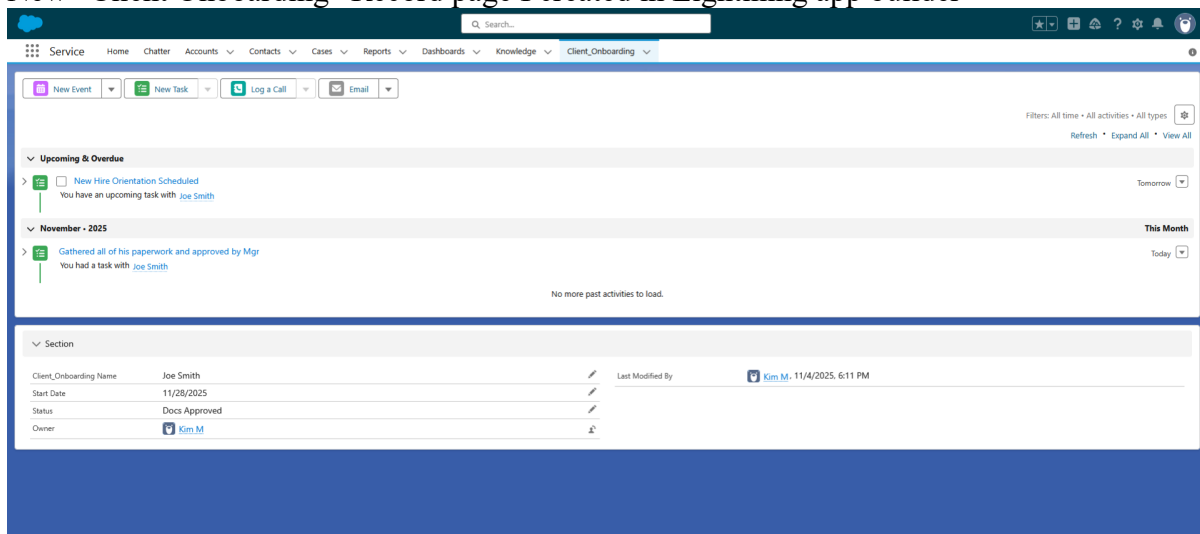
Run

Tips

Tested flow successfully, result = pass



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



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

