

Phase 4: Process Automation (Admin)

1. Validation Rules

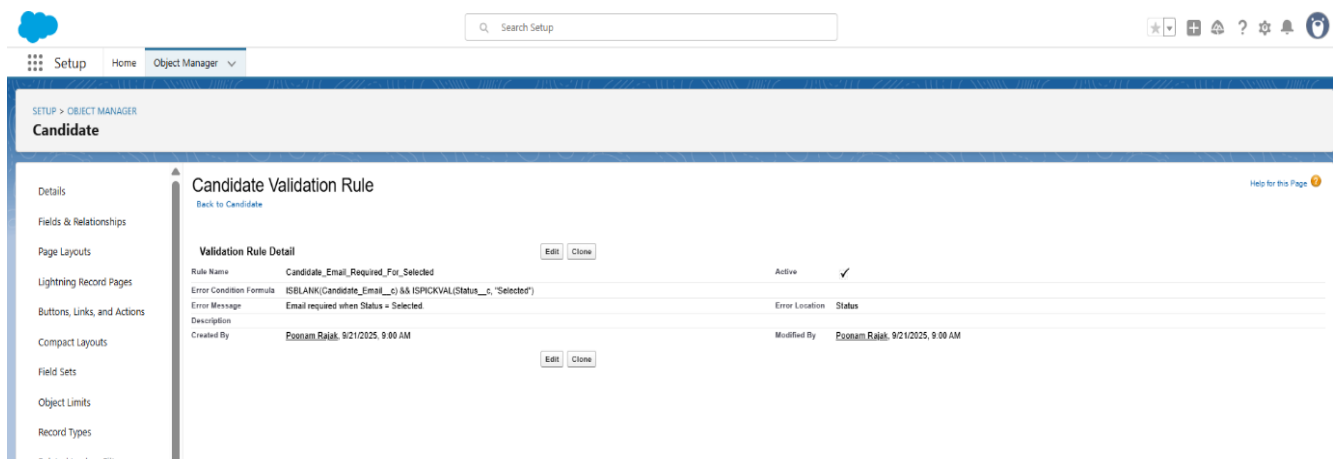
Configuration

A validation rule is set on the Candidate object to ensure that an Email address is required when the candidate's Status = Selected. This prevents records from being saved without the candidate's email.

Procedure

1. Go to Setup → Object Manager → Candidate.
2. Select Validation Rules → New.
3. Enter:
 - Rule Name: Candidate_Email_Required_For_Selected
 - Error Condition Formula:
`ISBLANK(Candidate_Email__c) && ISPICKVAL(Status__c, "Selected")`
 - Error Message: Email required when Status = Selected.
 - Error Location: Field → Status.
4. Mark the rule as Active and click Save.

Screenshot



2. Workflow Rules

Configuration

A workflow rule is created on the **Offer Letter** object to automatically send an email alert to the candidate whenever the **Status = Issued**. This ensures timely communication with candidates when an offer is released.

Procedure

1. Navigate to Setup → Process Automation → Workflow Rules.
2. Click New Rule → Select Object: Offer Letter.
3. Define criteria:
 - Rule Name: Offer_Issued_Email
 - Evaluation Criteria: Evaluate the rule when a record is created, and every time it's edited.
 - Rule Criteria: Offer Letter: Status = Issued.
4. Add Immediate Action → Email Alert:
 - Description: Offer Issued – Candidate
 - Recipients: Candidate email (from related record).
5. Mark the rule as Active and click Save.

Screenshot

- Workflow Rule definition with criteria and actions

The screenshot displays the Salesforce Setup interface. On the left, the 'Setup' menu is visible, with 'Workflow Rules' selected under 'Process Automation'. The main content area shows the 'Workflow Rule' configuration for 'Offer_Issued_Email'. The rule is active and evaluates the 'Offer Letter' object. The evaluation criteria are 'Offer Letter: Status EQUALS Issued'. The rule was created by 'Poonam Rajak' on 9/22/2025 at 12:13 AM. The workflow actions section shows an 'Immediate Workflow Action' of type 'Email Alert' with the description 'Offer Issued - Candidate'. A message at the bottom states: 'You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited". [Change Evaluation Criteria](#)'.

3. Process Builder

Configuration

Process Builder will also be retired after **Dec 31, 2025**. Use Flows as a replacement.

4.Approval Process

Configuration

A workflow rule is created on the Offer Letter object to automatically send an email alert to the candidate whenever the Status = Issued. This ensures timely communication with candidates when an offer is released.

Procedure

1. Navigate to Setup → Process Automation → Workflow Rules.
2. Click New Rule → Select Object: Offer Letter.

3. Define criteria:

- Rule Name: Offer_Issued_Email
- Evaluation Criteria: Evaluate the rule when a record is created, and every time it's edited.
- Rule Criteria: Offer Letter: Status = Issued.

4. Add Immediate Action → Email Alert:

- Description: Offer Issued – Candidate
- Recipients: Candidate email (from related record).

5. Mark the rule as Active and click Save.

Screenshot

The screenshot displays the Salesforce Setup interface for configuring an Approval Process. The main heading is "Approval Processes" with a sub-heading "Offer Letter: Offer Letter - Issue Approval". The page is divided into several sections:

- Process Definition Detail:** This section contains fields for Process Name, Unique Name, Description, Entry Criteria, Record Editability, Approval Assignment Email Template, Initial Submitters, and Created By. The "Active" checkbox is checked.
- Initial Submission Actions:** This section lists actions that are triggered when a record is submitted for approval. It includes actions like "Record Lock", "Field Update", and "Set Status to Pending Approval".
- Approval Steps:** This section defines the steps in the approval process. It includes fields for Action, Step Number, Name, Description, Criteria, Assigned Approver, and Reject Behavior.
- Final Approval Actions:** This section lists actions that are triggered when the approval process is completed. It includes actions like "Record Lock" and "Set Status to Declined".

The interface includes a search bar at the top, a navigation menu on the left, and a help icon in the top right corner.

5.Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)

Flow 1 — RT-Interview-Scheduled-Email

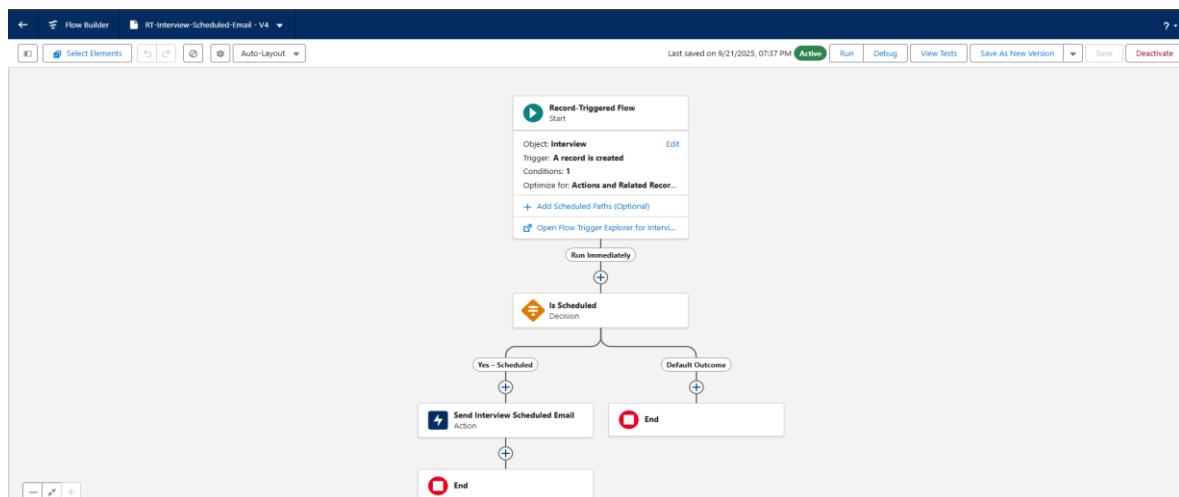
Configuration

- Type: Record-Triggered Flow on Interview__c
- Trigger: When a record is created
- Purpose: Send an email notification to the candidate when Status = Scheduled
- Context: Run on actions and related records
- Logic: Includes a Decision element *“Is Scheduled”*

Procedure

1. Navigate to Setup → Flows → New Flow → Record-Triggered Flow.
2. Select Object = Interview__c, Trigger = A record is created.
3. Define entry criteria: Status__c = “Scheduled” (or use a Decision element after Start).
4. Add an Action → Email Alert (“Interview Scheduled”) to send details (Candidate email, Date/Time, Interviewer name).
5. Activate the flow.

Screenshot



Flow 2 — RT-Candidate-Selected-Create-Offer

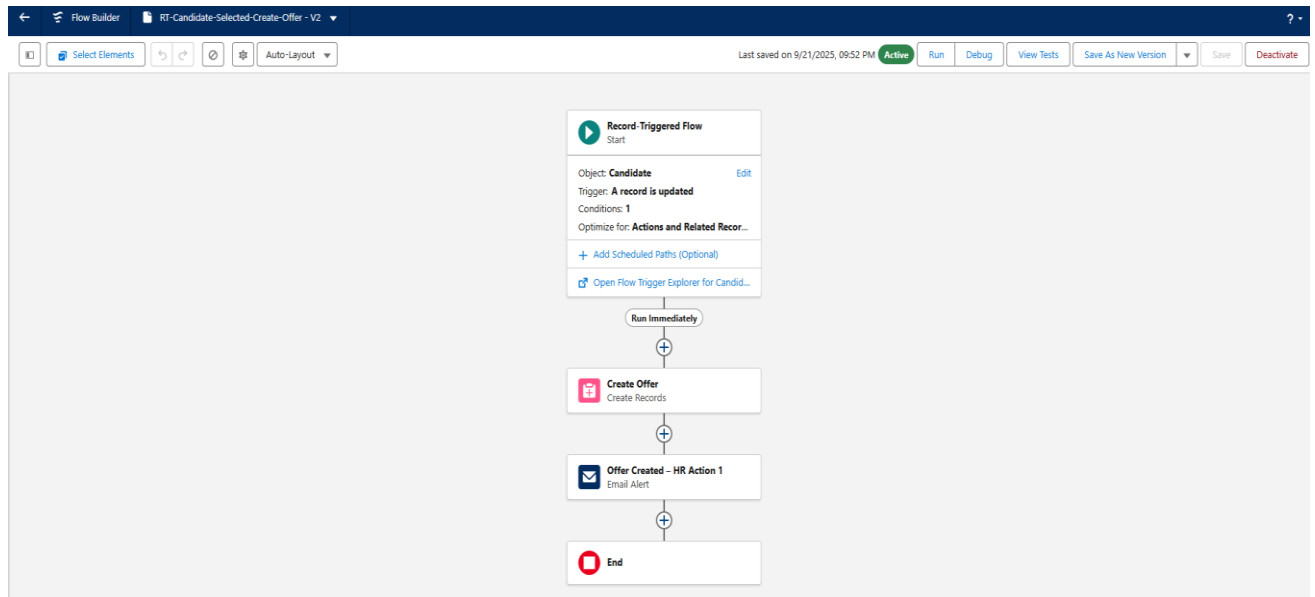
Configuration

- Type: Record-Triggered Flow on Candidate__c
- Trigger: When a record is updated
- Purpose: When a candidate is marked Selected/Offered, automatically create an Offer Letter and notify HR
- Context: Optimized for actions and related records

Procedure

1. Go to Setup → Flows → New Flow → Record-Triggered Flow.
2. Select Object = Candidate__c, Trigger = A record is updated.
3. Entry criteria: ISCHANGED(Status__c) AND Status__c = “Selected” (or “Offered”).
4. Add Create Records element → Create Offer_Letter__c:
 - Candidate__c = \$Record.Id
 - Status__c = “Draft”
5. Add Email Alert → “Offer Created – HR Action” to Hiring Manager/HR queue.
6. Activate the flow.

Screenshot



Flow 3 — Notify HR on Offer Sent

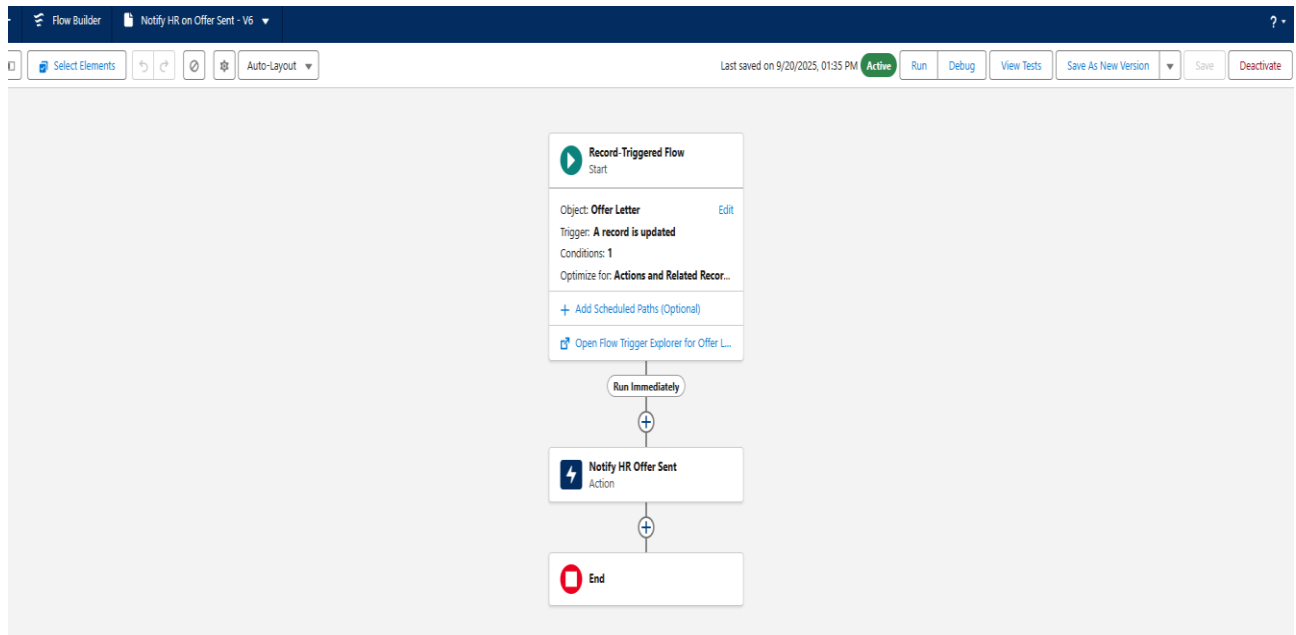
Configuration

- Type: Record-Triggered Flow on Offer_Letter__c
- Trigger: When a record is updated
- Purpose: Notify HR when an offer is Sent
- Logic: Single action path

Procedure

1. Go to Setup → Flows → New Flow → Record-Triggered Flow.
2. Select Object = Offer_Letter__c, Trigger = A record is updated.
3. Entry criteria: ISCHANGED(Status__c) AND Status__c = "Sent".
4. Add Action → Email Alert ("Offer Sent – Notify HR") to HR/Hiring Manager.
5. Activate the flow.

Screenshot



Flow 4 — Interview to Offer — Auto Create

Configuration

- Type: Record-Triggered Flow on Interview__c
- Trigger: When a record is updated
- Purpose: Auto-create a Draft Offer after interview completion (with optional $\text{Score} \geq \text{threshold}$)
- Logic: Create-only path

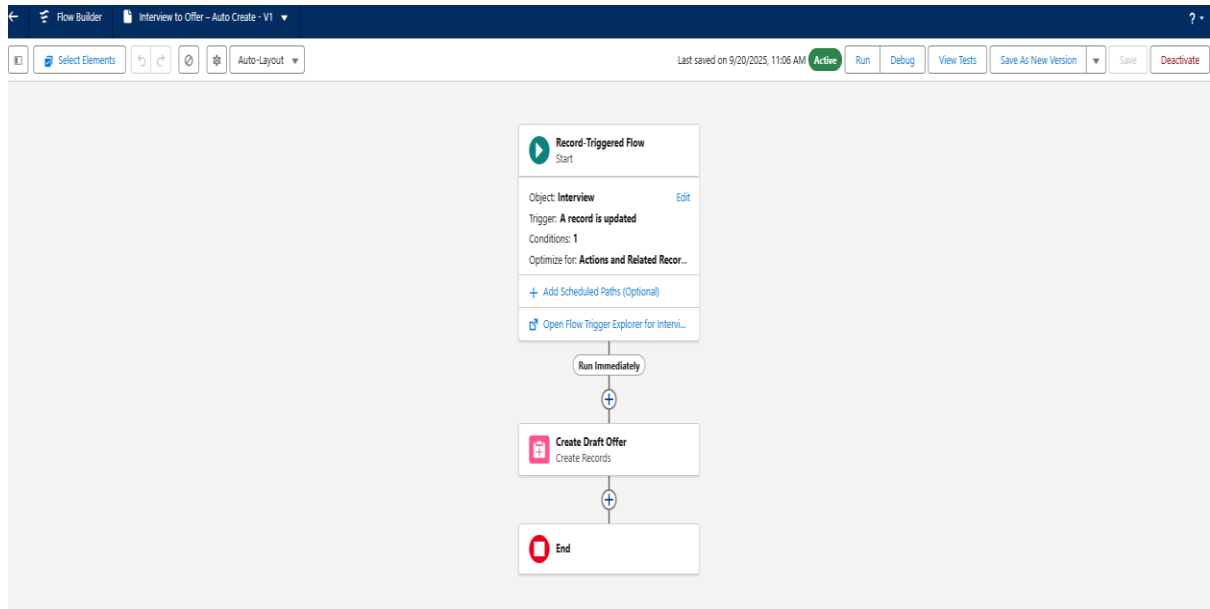
Procedure

1. Navigate to Setup → Flows → New Flow → Record-Triggered Flow.
2. Select Object = Interview__c, Trigger = A record is updated.
3. Entry criteria: $\text{ISCHANGED}(\text{Status_c})$ AND $\text{Status_c} = \text{"Completed"}$ (add $\text{Score_c} \geq \text{threshold}$ if required).
4. Add Create Records element → Create Offer_Letter__c:
 - $\text{Candidate_c} = \$\text{Record.Candidate_c}$

- Status__c = “Draft”

5. Activate the flow.

Screenshot



Flow 5 — RT-Interview-Completed-Update-Candidate

Configuration

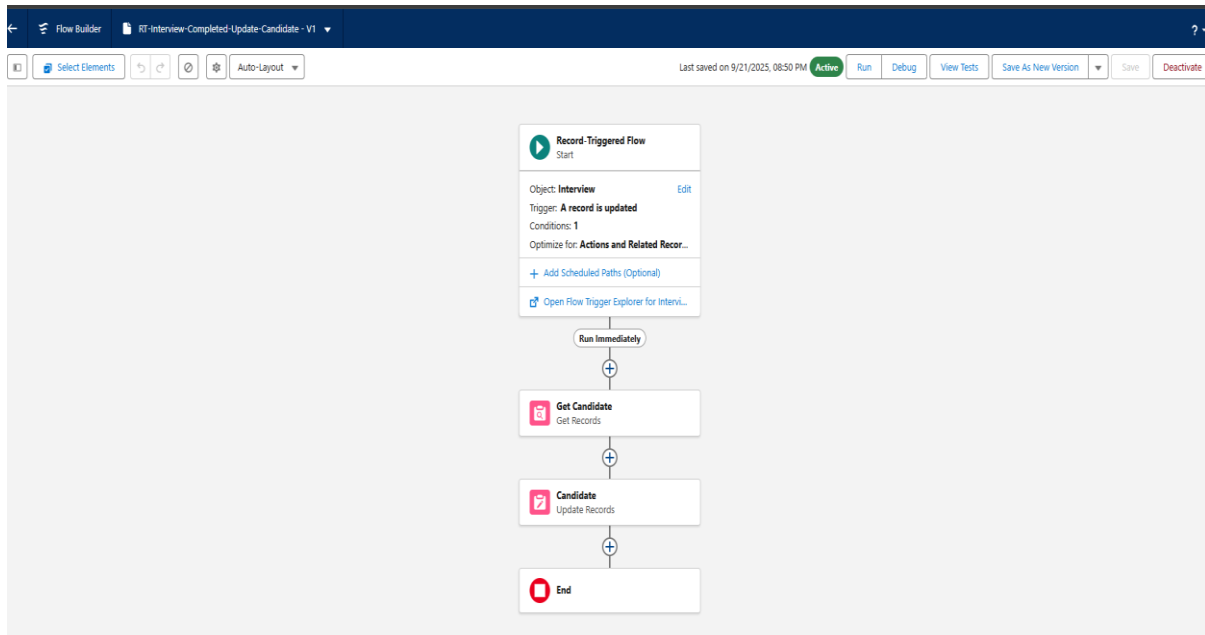
- Type: Record-Triggered Flow on Interview__c
- Trigger: When a record is updated
- Purpose: Update Candidate status to Interviewed once Interview is completed
- Logic: Uses Get Records + Update Records

Procedure

1. Go to Setup → Flows → New Flow → Record-Triggered Flow.
2. Select Object = Interview__c, Trigger = A record is updated.
3. Entry criteria: ISCHANGED(Status__c) AND Status__c = “Completed”.

4. Add Get Records → Candidate where Id = \$Record.Candidate__c.
5. Add Update Records → Candidate.Status__c = “Interviewed”.
6. Activate the flow.

Screenshot



Flow 6 — Candidate — Update Skills Summary

Configuration

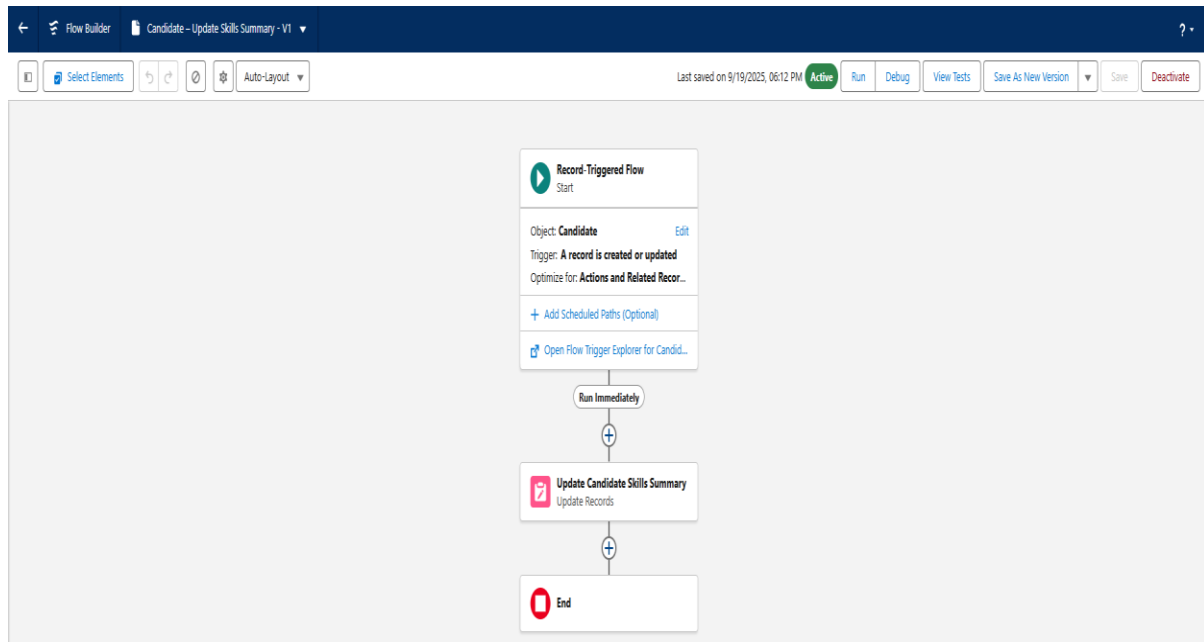
- Type: Record-Triggered Flow on Candidate__c
- Trigger: When a record is created or updated
- Purpose: Auto-update Skills_Summary__c field based on Skills__c (derived/normalized text)
- Logic: Single Update Records element

Procedure

1. Navigate to Setup → Flows → New Flow → Record-Triggered Flow.
2. Select Object = Candidate__c, Trigger = A record is created or updated.
3. Entry criteria: When Skills__c is changed (optional filter).

4. Add Update Records → Candidate.Skills_Summary__c = TEXT(...formula or substring of Skills__c).
5. Activate the flow.

Screenshot



6.Email Alerts

Email Alert 1 — Offer Created – HR

Configuration

- Purpose: Notify HR when an Offer record is created from Candidate selection or related flows.
- Object: Offer_Letter__c
- Template: *Sales: New Customer Email*
- Recipients: Specific Users + external emails
- Sender: Current User's email (per configuration)

Email Alert 2 — Offer Issued – Candidate

Configuration

- Purpose: Notify stakeholders when an Offer is issued to the candidate; reusable across flows and approval processes.
- Object: Offer_Letter__c
- Template: *Offer_Issued_To_Candidate*
- Recipients: Recruiters, Users, and optional additional emails
- Sender: Default Workflow User (if not overridden)

Common Procedure for Email Alerts

1. Go to Setup → Quick Find → Email Alerts → New Email Alert.
2. Enter Description and Unique Name for the alert.
3. Select the related Object (e.g., Offer_Letter__c).
4. Choose the appropriate Email Template (Lightning or Classic).
5. Add Recipients (Users, Roles, Email fields, or Additional Emails).
6. Define the From Address (Current User or Default Workflow User).
7. Click Save.
8. Reference this Email Alert in Flows, Workflow Rules, or Approval Processes by adding an Email Alert action and passing the related record Id.

Screenshot

The screenshot shows the 'Email Alerts' configuration page in a system. The left sidebar has a search bar with 'email alert' and a list of categories: Process Automation, Workflow Actions, and Email Alerts (selected). The main content area is titled 'Email Alerts' and shows details for an alert named 'Offer Created - HR'. The details include a description, unique name, from email address, recipients, additional emails, and creation/modification dates. Below the details are sections for 'Rules Using This Email Alert', 'Approval Processes Using This Email Alert', 'Entitlement Processes Using This Email Alert', and 'Flows Using This Email Alert'. The 'Flows' section shows a table with one entry: 'RT.Candidate-Selected-Create Offer' with version 2, description 'RT.Candidate-Selected-Create Offer', object '01HGL000002PVbp', and active status.

Search Setup

Setup Home Object Manager

Q email alert

Process Automation

Workflow Actions

Email Alerts

Didn't find what you're looking for? Try using Global Search.

SETUP Email Alerts

Email Alert

Offer Created - HR

Rules Using This Email Alert

Approval Processes Using This Email Alert

Entitlement Processes Using This Email Alert

Flows Using This Email Alert

Flow Name	Version	Description	Object	Active
RT.Candidate-Selected-Create Offer	2	RT.Candidate-Selected-Create Offer	01HGL000002PVbp	✓

The screenshot shows the 'Email Alerts' configuration page for an alert named 'Offer Issued - Candidate'. The layout is similar to the first screenshot, with a left sidebar and a main content area. The 'Email Alert Detail' section shows the alert's configuration. The 'Rules Using This Email Alert' section shows a table with one entry: 'Offer Issued - Candidate' with description 'Offer Issued - Candidate', object 'Offer Letter', and active status. The 'Approval Processes Using This Email Alert' and 'Entitlement Processes Using This Email Alert' sections are empty. The 'Flows Using This Email Alert' section shows a table with one entry: 'Offer Issued - Candidate' with description 'Offer Issued - Candidate', object 'Offer Letter', and active status.

Search Setup

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Q email alert

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Workflow Actions

Email Alerts

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SETUP Email Alerts

Email Alert

Offer Issued - Candidate

Rules Using This Email Alert

Approval Processes Using This Email Alert

Entitlement Processes Using This Email Alert

Flows Using This Email Alert

Action	Rule Name	Description	Object	Active
Edit / Deactivate	Offer Issued - Candidate	Offer Issued - Candidate	Offer Letter	✓

Flow Name	Version	Description	Object	Active
Offer Issued - Candidate		Offer Issued - Candidate	Offer Letter	✓

7. Field Updates

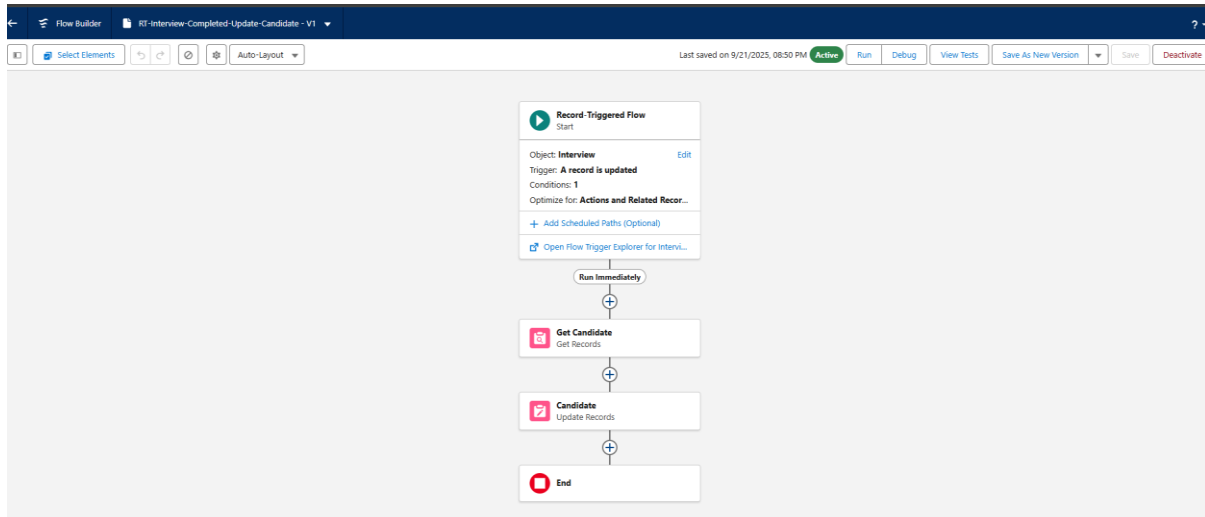
Configuration

- Candidate.Status__c updated automatically:
 - “Interviewed” after Interview completion
 - “Hired” after Offer acceptance
 - “Approved/Rejected” after approval outcome

Procedure

- In Record-Triggered Flows: Add Update Records element for Candidate.Status__c
- In Approval Process: Configure Final Approval/Rejection actions to update Offer.Status__c

Screenshot



8.Tasks

Not created, not configured

9. Custom Notifications

Not created, not configured