

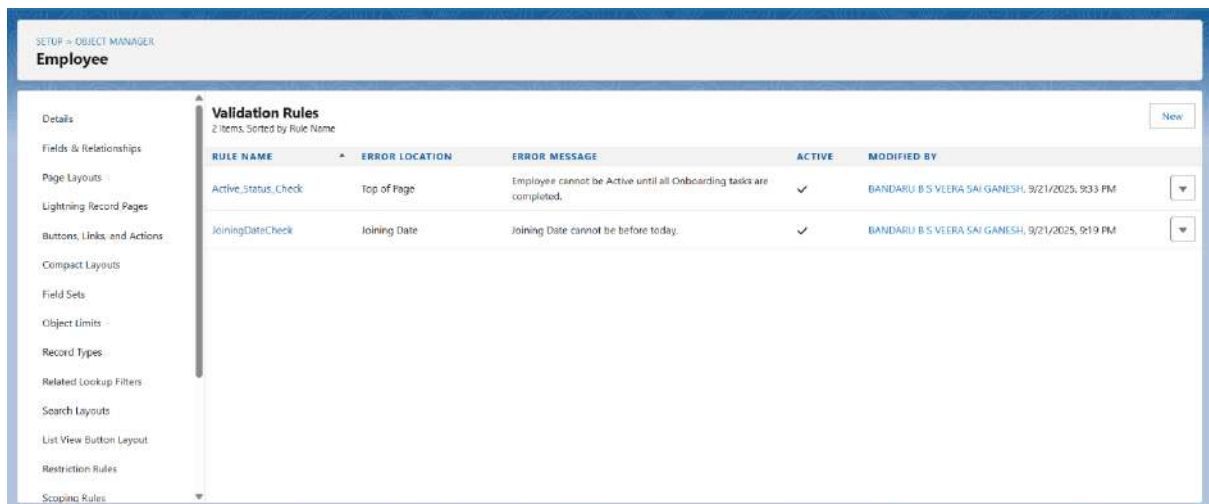
# Employee Onboarding & Asset Management CRM Project

## Phase 4: Process Automation (Admin)

### 1. Validation Rules

#### (a) Employee Joining Date Not in Past

1. Go to **Setup** → **Object Manager** → **Employee\_\_c** → **Validation Rules** → **New**.
2. Rule Name: JoiningDateCheck
3. Formula:
4. `Joining_Date__c < TODAY()`
5. Error Message: *"Joining Date cannot be before today."*
6. Error Location: Joining Date field.



Validation Rules				
2 Items, Sorted by Rule Name				
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Active_Status_Check	Top of Page	Employee cannot be Active until all Onboarding tasks are completed.	✓	BANDARU B S VEERA SAI GANESH, 9/21/2025, 9:33 PM
JoiningDateCheck	Joining Date	Joining Date cannot be before today.	✓	BANDARU B S VEERA SAI GANESH, 9/21/2025, 9:19 PM

#### (b) Employee cannot be “Active” unless all tasks completed

1. Go to **Employee\_\_c Validation Rules** → **New**.
2. Formula:

AND(

ISPICKVAL(Status\_\_c, "Active"),

Incomplete\_Tasks\_\_c > 0

)

3. Error Message: *"Employee cannot be Active until all tasks are completed."*

SETUP > OBJECT MANAGER	
Employee	
Details	Validation Rules 2 Items, Sorted by Rule Name
Fields & Relationships	
Page Layouts	
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
List View Button Layout	
Restriction Rules	
Scoping Rules	

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Active_Status_Check	Top of Page	Employee cannot be Active until all Onboarding tasks are completed.	✓	BANDARU B S VEERA SAI GANESH, 9/21/2025, 9:33 PM
JoiningDateCheck	Joining Date	Joining Date cannot be before today.	✓	BANDARU B S VEERA SAI GANESH, 9/21/2025, 9:19 PM

### (c) Asset Allocation Date before Return Date

1. Go to Asset\_\_c → Validation Rules → New.
2. Formula:
3.  $\text{Return\_Date\_c} < \text{Allocation\_Date\_c}$
4. Error Message: *"Return Date cannot be earlier than Allocation Date."*

SETUP > OBJECT MANAGER	
Asset	
Details	Validation Rules 1 Items, Sorted by Rule Name
Fields & Relationships	
Page Layouts	
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
List View Button Layout	
Restriction Rules	
Scoping Rules	

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Valid_Allocation_Date	Allocation Date	Allocation Date must be before Return Date.	✓	BANDARU B S VEERA SAI GANESH, 9/21/2025, 9:35 PM

## 2. Workflow Rules (basic automations)

### Reminder for overdue Onboarding Task

1. Setup → Workflow Rules → **New Rule.**
  - Object: Onboarding\_Task\_\_c.
  - Criteria:  $\text{Status\_c} = \text{"Pending"} \text{ AND } \text{Due\_Date\_c} < \text{TODAY()}$ .
2. Action → **Email Alert** → Send to Assigned User.

**Workflow Rule Detail**

Rule Name	Overdue_Task_Reminder	Object	Onboarding Task
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and every time its edited
Description			
Rule Criteria	AND( ISPICKVAL(Status, c, "Pending"), Due_Date__c < TODAY() )		
Created By	BANDARIJ B S VEERA SAI GANESH, 9/21/2025, 9:45 PM		Modified By: BANDARIJ B S VEERA SAI GANESH, 9/21/2025, 9:51 PM

**Workflow Actions**

**Immediate Workflow Actions**

Type	Description
Email Alert	Overdue Onboarding Task Reminder

**Time-Dependent Workflow Actions** [See an example](#)

## Asset Allocation Confirmation Email

- Setup → Workflow Rules → New.
  - Object: Asset\_\_c.
  - Evaluation: Created.
- Action → **Email Alert** → IT Admin + Employee.

**Workflow Rule Detail**

Rule Name	Asset_Allocation_Confirmation	Workflow Rule: Asset_Allocation_Confirmation - Salesforce - Developer Edition
Active	<input checked="" type="checkbox"/>	Evaluation Criteria
Description		
Rule Criteria	TRUE	
Created By	BANDARIJ B S VEERA SAI GANESH, 9/21/2025, 9:54 PM	
Modified By	BANDARIJ B S VEERA SAI GANESH, 9/21/2025, 9:56 PM	

**Workflow Actions**

**Immediate Workflow Actions**

Type	Description
Email Alert	Asset_Allocation_Email

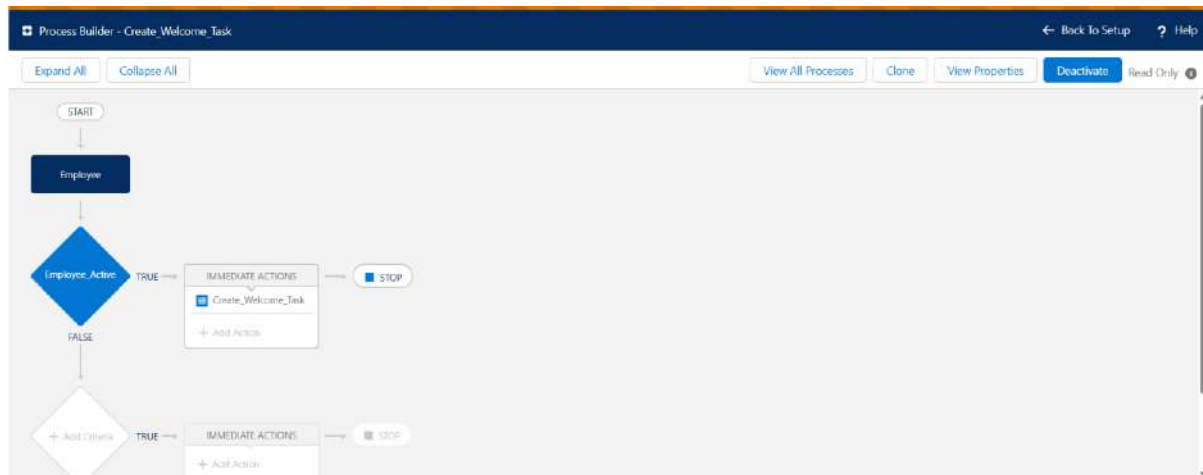
**Time-Dependent Workflow Actions** [See an example](#)

## 3. Process Builder (advanced)

### Auto-create Welcome Task when Employee becomes Active

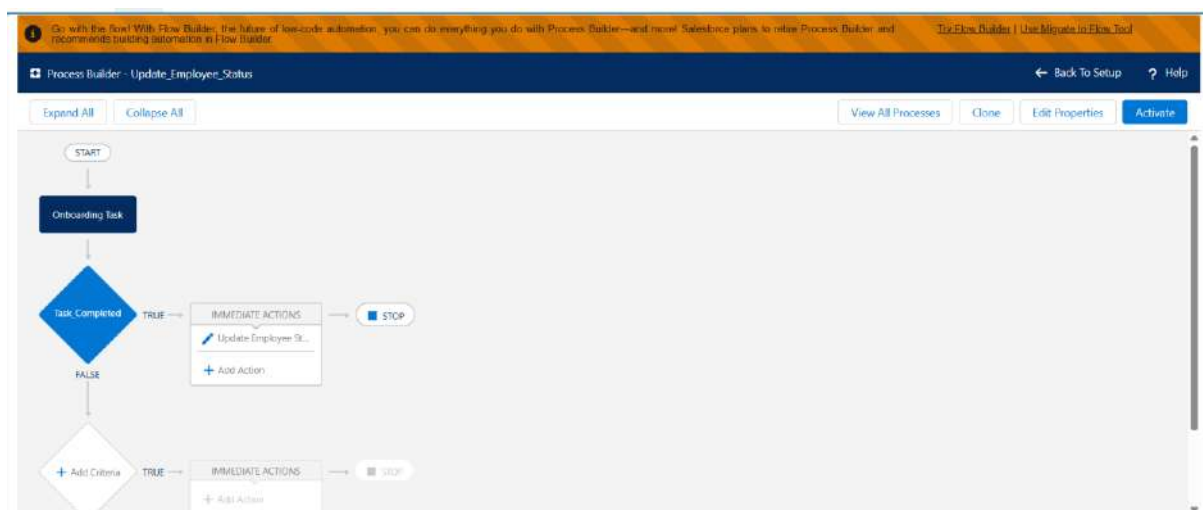
- Setup → Process Builder → New → Object: Employee\_\_c.
- Start: **when record is updated**.

3. Criteria: Status\_\_c = "Active".
4. Action: **Create a Record** → Onboarding\_Task\_\_c.
  - Task Name: “Welcome Session”.
  - Assigned To: HR Manager (lookup).
  - Related Employee: [Employee\_\_c].Id.



### Auto-update Employee Status when all tasks done

1. Setup → Process Builder → New → Object: Onboarding\_Task\_\_c.
2. Start: **when record is updated**.
3. Criteria: Status = Completed.
4. Action: **Update Records** → Employee\_\_c.Status\_\_c = “Active” (only if all tasks are done – use Rollup summary or Flow helper).



## 4. Approval Process

### Asset Request > ₹50,000

1. Setup → Approval Processes → New → Object: Asset\_\_c.
2. Entry Criteria: Value\_\_c > 50000.
3. Approvers: Department Manager → Then HR Manager.
4. Actions:
  - On Approval → Update Asset Status = Assigned.
  - On Rejection → Email HR.

The screenshot displays the 'Approval Processes' configuration page in Salesforce Setup. The process is named 'Asset: Asset High Value Approval'. Key configuration details include:

- Process Name:** Asset High Value Approval
- Unique Name:** Asset\_High\_Value\_Approval
- Description:** Asset: Value GREATER THAN 50000
- Entry Criteria:** Asset: Value GREATER THAN 50000
- Record Editability:** Administrator ONLY
- Approval Assignment Email Template:** Asset Request Approval
- Initial Submitters:** Asset Owner
- Created By:** BANDARIJ.B.S.VEFRA.SAI.GANESH, 9/21/2025, 10:36 PM
- Modified By:** BANDARIJ.B.S.VEFRA.SAI.GANESH, 9/21/2025, 10:37 PM

Below the process details, there is a section for 'Initial Submission Actions' with one action defined: 'Record Lock' with the description 'Lock the record from being edited'.

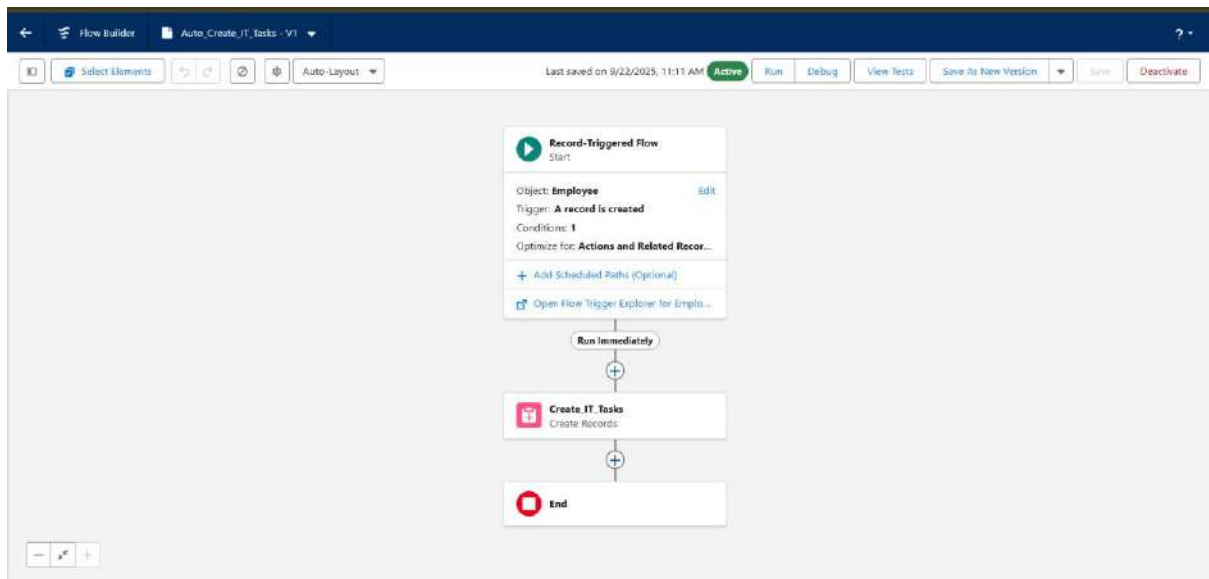
The 'Approval Steps' section shows a single step:

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Asset High Value Approval	1	Asset High Value Approval			Manager	Final Rejection

## 5. Flow Builder (powerful automation)

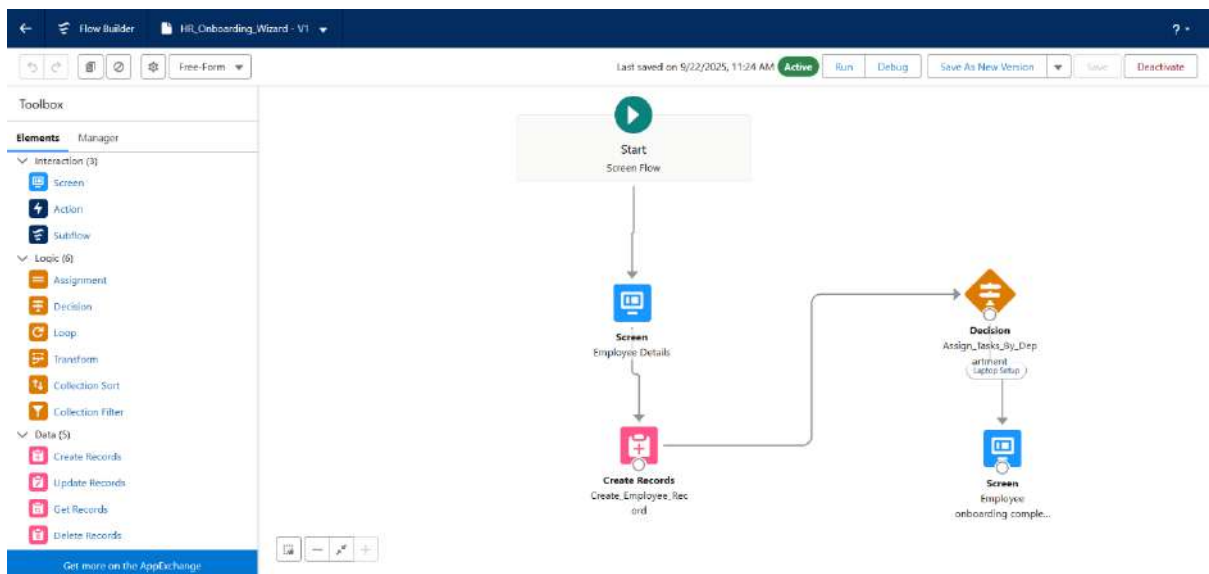
### (a) Record-Triggered Flow → Auto-create IT tasks when Employee created

1. Setup → Flows → New Flow → **Record-Triggered**.
2. Object: Employee\_\_c.
3. Trigger: On Create.
4. Condition: Department\_\_c = "IT".
5. Action: **Create Records** → Multiple Onboarding\_Task\_\_c (Laptop Setup, ID Card, Orientation).



## (b) Screen Flow → HR Onboarding Wizard

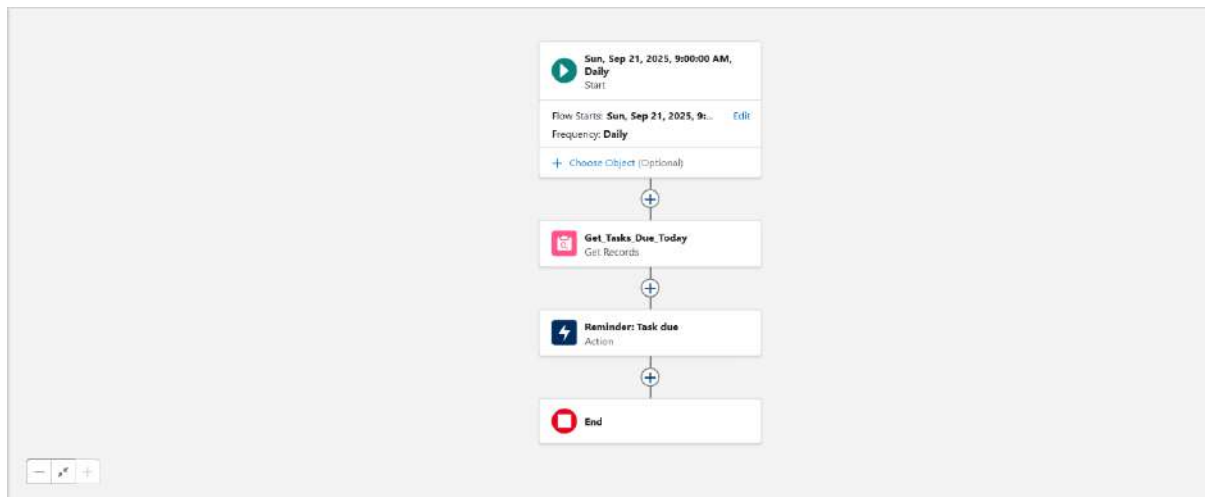
1. Flow → New → **Screen Flow**.
2. Add Screen Elements → Employee Details, Department, Manager.
3. Save Employee\_\_c record.
4. Assign related tasks automatically.



## (c) Scheduled Flow → Daily Task Reminders

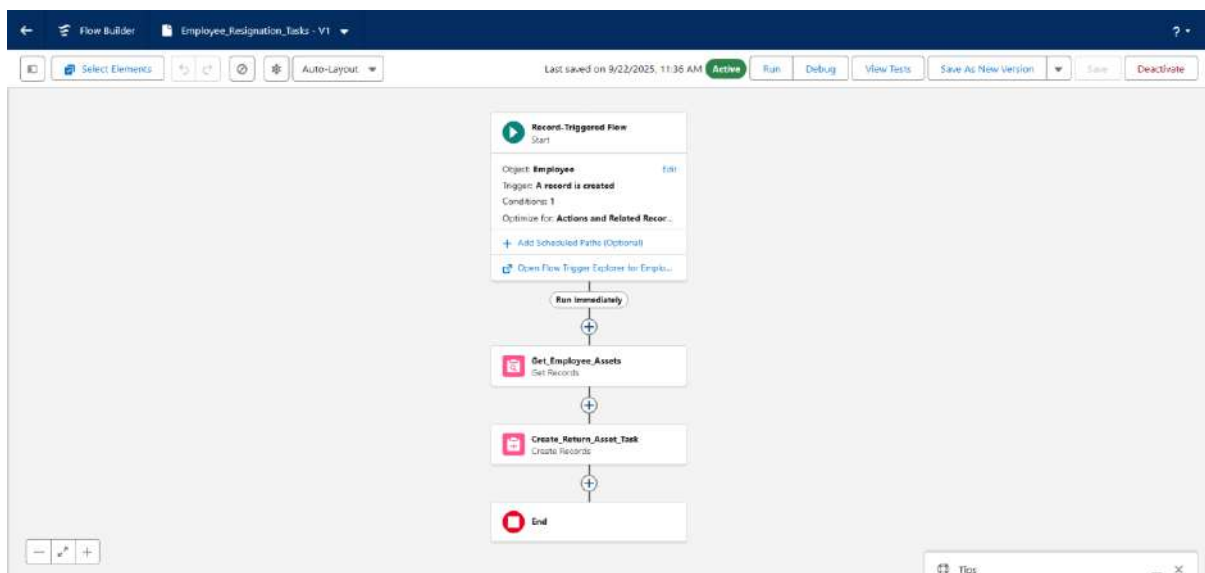
1. New Flow → **Scheduled**.
2. Run daily at 9:00 AM.
3. Query Onboarding\_Task\_\_c where Due\_Date\_\_c = TODAY.

#### 4. Send Email/Notification.



#### (d) Auto-launched Flow → Employee Resigned

1. Flow → New → **Record-Triggered**.
2. Object: Employee\_\_c.
3. Trigger: On Update → If Status = “Resigned”.
4. Action: Create related “Return Asset” tasks.



#### 6. Email Alerts

- Setup → Email Alerts → Create:
  - Onboarding Reminder (Assigned User).
  - Asset Allocation Confirmation (IT + Employee).

- Employee Activation Email (Manager).

**Classic Email Templates**

Unfiled Public Classic Email Templates

Classic Email Template Availability

Folder: Unfiled Public Classic Email Templates | Create New Folder

<Previous Page | Next Page>

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Email Template Name	Template Type	Available For Use	Description	Author	Last Modified Date
Edit   Del	Appointment for Unauthenticated User using Appointment Types - For Amazon China	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with Amazon China.	stfcdadm	8/25/2025
Edit   Del	Appointment for Unauthenticated User using Appointment Types - For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using appointment types with third party video applications.	stfcdadm	8/25/2025
Edit   Del	Appointment for Unauthenticated User using Engagement Channels For Amazon China	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with Amazon China.	stfcdadm	8/25/2025
Edit   Del	Appointment for Unauthenticated User using Engagement Channels For third party	Custom	✓	Email template for confirmation of an appointment when appointments are scheduled using engagement channels with third party video applications.	stfcdadm	8/25/2025
Edit   Del	Asset Request Approval	Text	✓		sai	9/21/2025
Edit   Del	Asset Allocation Email	Text	✓		sai	9/21/2025
Edit   Del	Canceled Service Appointment Confirmation Email	Custom	✓	Email Template to confirm canceling of a service appointment.	stfcdadm	8/25/2025
Edit   Del	Commerce Reorder Portal Invitation	Custom	✓	Invite a contact to a Commerce Reorder Portal.	autoprocc	8/25/2025
Edit   Del	Group Service Appointments Enrollment Confirmation Email	Custom	✓	Email Template to confirm enrollment of an attendee to a Group service appointment.	stfcdadm	8/25/2025
Edit   Del	Marketing Product Inquiry Response	Text	✓	Standard email response to website product inquiries	QEPLC	8/25/2025
Edit   Del	Onboarding Task Completion	Text	✓		ed	8/25/2025

## 7. Field Updates

- If Employee = Resigned → Update Assets to “Return Pending”.
- On Task Completion → Update Task Completion Date.

## 8. Custom Notifications & Tasks

1. Setup → Notification Builder → New Custom Notification → “Employee Onboarding Update”.
2. Add to Process/Flow: Notify Manager when Employee becomes Active.
3. Tasks: Auto-create HR follow-up tasks (e.g., “Policy Training”).