

Employee Onboarding Application -Phase 4

A —Average onboarding tasks (Record-triggered Flow)

The screenshot displays the Salesforce Flow Builder interface for a 'Record-Triggered Flow' named 'Average Onboarding Task - V1'. The flow is triggered when a record is created in the 'Employee Profile' object. The flow steps are: 'Run Immediately' (Start), 'Create Onboarding Task' (Create Records), and 'End'. The 'Create Onboarding Task' step is expanded, showing the 'Create Records' configuration. The 'Object' is set to 'Onboarding Task'. The 'Set Field Values for the Onboarding Task' section shows the following field-value mappings:

Field	Value
Due Date	Triggering Employee_Profile__c > Date of Joining
Subject	Subject_SubmitProof
Task Name	TaskName_SubmitProof
Status	Pending
Employee	Triggering Employee_Profile__c > Record ID

The right sidebar shows the 'Create Records' configuration with options for 'How to set record field values' (Manually) and 'Object' (Onboarding Task). The bottom status bar indicates the flow was last saved on 9/24/2025 at 10:39 PM.

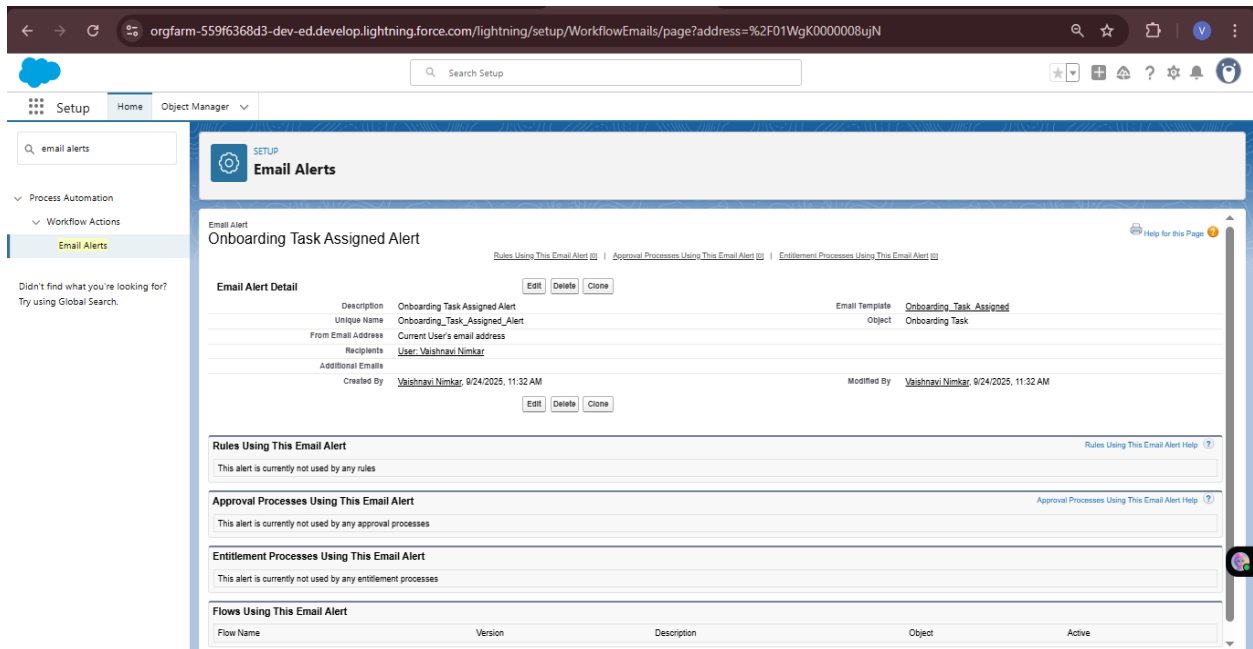
B — Email notification when a task is created (Send email to assignee / manager).

Email Template Name = Onboarding Task Assigned

The screenshot shows the Salesforce Setup interface for configuring a 'Classic Email Template'. The template is named 'Onboarding Task Assigned' and is located in the 'Untitled Public Classic Email Templates' folder. The configuration details are as follows:

Field	Value
Folder	Untitled Public Classic Email Templates
Available For Use	<input checked="" type="checkbox"/>
Email Template Name	Onboarding_Task_Assigned
Template Unique Name	Onboarding_Task_Assigned
Encoding	Unicode (UTF-8)
Description	
Subject	New Onboarding Task Assigned
Email Body	<p>Hello,</p> <p>A new onboarding task has been assigned to you.</p> <p>Please log in to Salesforce to view the task details.</p> <p>Thanks,</p> <p>HR Team</p>

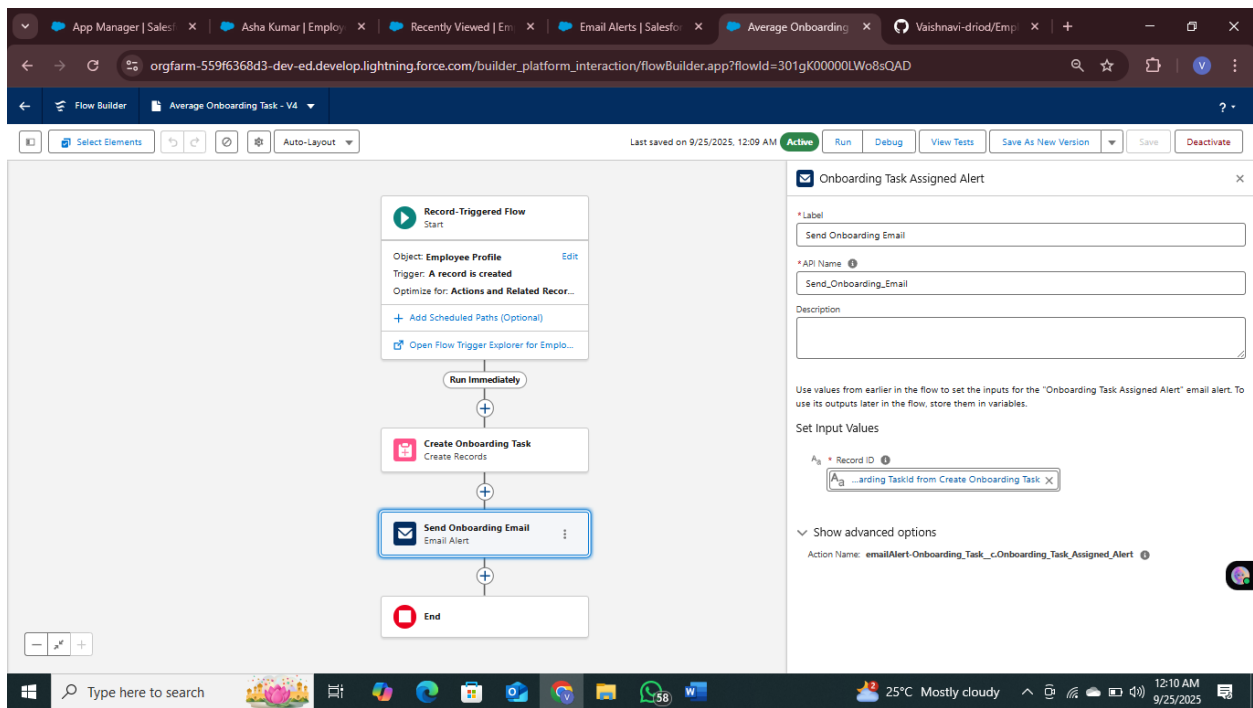
The interface includes a 'Step 2 of 2' progress indicator and buttons for 'Previous', 'Save', and 'Cancel'. The left sidebar shows the 'Setup' menu with 'Email' and 'Classic Email Templates' selected.



Add a Send Email action to the Flow:

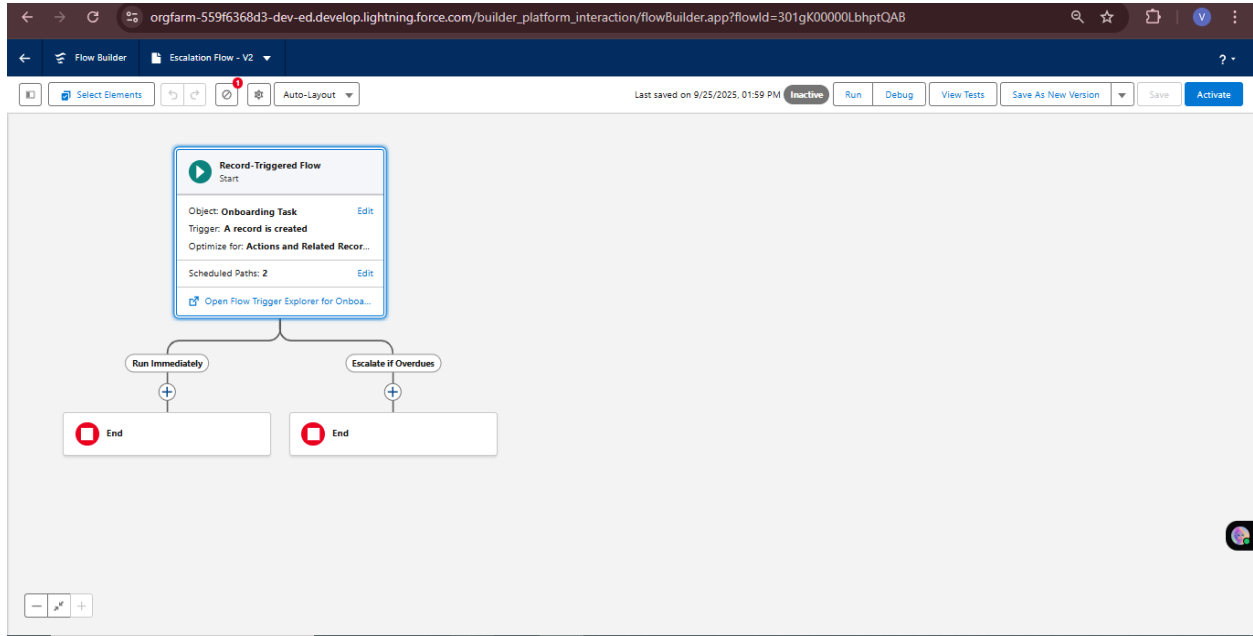
4. Configure the action:

Label = Email - Task Assigned

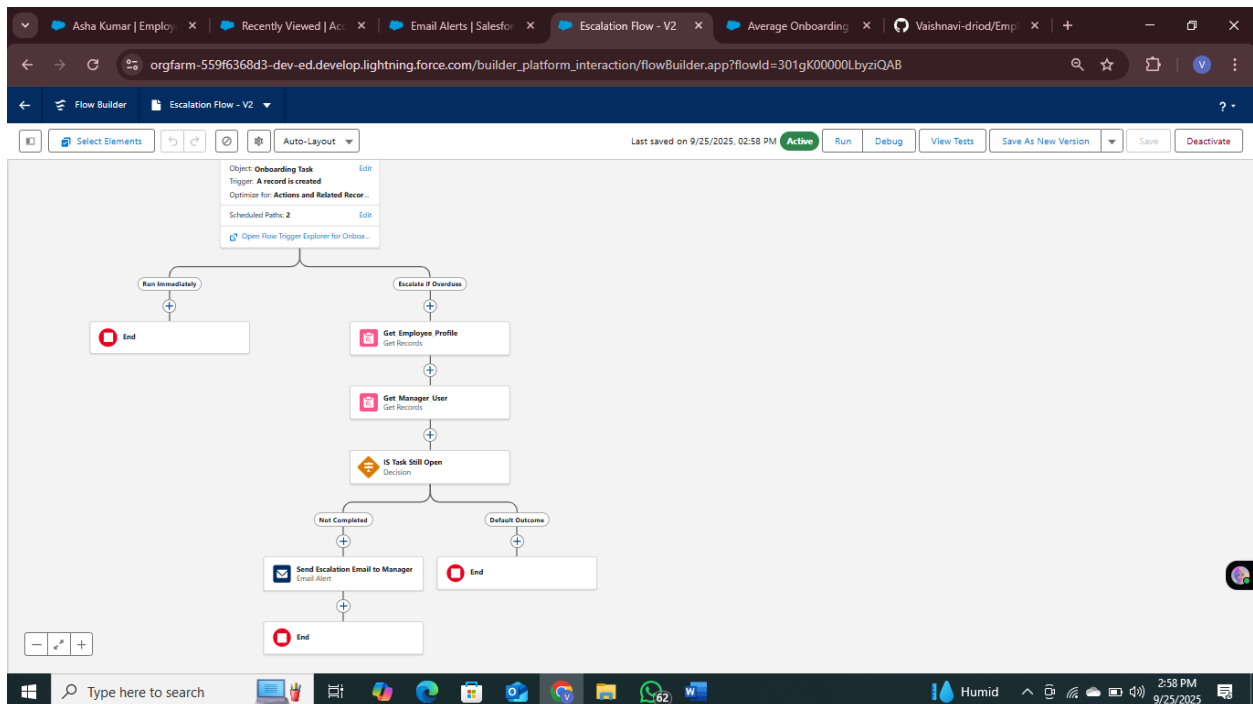


C — Escalation workflow for overdue tasks (Scheduled path on Onboarding Task)

1. Setup → Flows → New Flow → Select Record-Triggered Flow → Create.
2. Label: Escalate if overdue



6. Save → Activate.



D — Manager reminders (scheduled reminder before due date)

You can either add a second scheduled path on the same Onboarding Task flow or add a scheduled path on the Employee Profile flow that schedules based on Date of Joining.

Using Onboarding Task flow:

1. Edit the Onboarding Task flow (from C).
2. With Start selected click Add Scheduled Path again:

Label = Reminder - 2 days before due

Offset: 2 → choose Days Before → Due Date__c.

3. On that scheduled path add Decision to check Status__c != Completed → if not completed → Send Email to Manager with reminder.

4. Save → Activate.

