Project Title: Employee Wellness & Productivity Tracker

Phase 4 : Process Automation (Admin)

VALIDATION RULES

Validation rules ensure data accuracy and prevent users from entering incorrect or incomplete information. In this project, validation rules were implemented on key custom objects to maintain clean and consistent employee wellness data.

Rule 1: Wellness Score Range (Employee_Wellness__c)

Employee Wellness Validation Rule
Back to Employee Wellness

Help for this Page

Validation Rule Detail   Edit   Clone

Rule Name	Wellness_Score_Range	Active	✓
Error Condition Formula	OR(Wellness_Score__c < 1 , Wellness_Score__c > 100)		
Error Message	Wellness Score must be between 1 and 100	Error Location	Wellness Score
Description			
Created By	Ayushi Bhanotra, 9/24/2025, 4:51 AM	Modified By	Ayushi Bhanotra, 9/24/2025, 4:52 AM

Edit   Clone

Rule 2: Report Date Future (Wellness_Report__c)

Wellness Report Validation Rule
Back to Wellness Report

Help for this Page

Validation Rule Detail   Edit   Clone

Rule Name	Report_Date_Future	Active	✓
Error Condition Formula	Date__c > TODAY()		
Error Message	Report Date cannot be in the future.	Error Location	Date
Description			
Created By	Ayushi Bhanotra, 9/24/2025, 4:55 AM	Modified By	Ayushi Bhanotra, 9/24/2025, 4:55 AM

Edit   Clone

WORKFLOW PROCESS

Workflow rules automate actions based on specific criteria, helping ensure timely notifications and process efficiency. In this project, two workflows were implemented:

1. **Employee Wellness – No Check-in Reminder**

   Use Case: Remind employees if no wellness check-in in 30 days.

Workflow Rule Detail	Edit	Clone	Deactivate		
Rule Name	Remind_No_Checkin_30_Days		Object	Employee Wellness
Active	✓		Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description				
Rule Criteria	TODAY() - Last_Checkin_Date__c >= 30			
Created By	Ayushi Bhanotra, 9/24/2025, 5:15 AM		Modified By	Ayushi Bhanotra, 9/24/2025, 5:27 AM

   Workflow Actions   Edit

   Immediate Workflow Actions

Type	Description
Email Alert	No Check-in Reminder Email

   Time-Dependent Workflow Actions   See an example

   📅 30 Days After Employee Wellness: Last Checkin Date

Type	Description
Email Alert	No Check-in Reminder Email

2. **Wellness Report – Critical Report Alert**

   Use Case**:** Notify HR when a wellness report is submitted with critical status.

Workflow Rule Detail	Edit	Clone	Deactivate		
Rule Name	Critical_Report_Alert		Object	Wellness Report
Active	✓		Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description				
Rule Criteria	Score_Summary__c < 40			
Created By	Ayushi Bhanotra, 9/24/2025, 5:44 AM		Modified By	Ayushi Bhanotra, 9/24/2025, 5:49 AM

   Workflow Actions   Edit

   Immediate Workflow Actions

Type	Description
Email Alert	Critical Wellness Report Alert

   Time-Dependent Workflow Actions   See an example

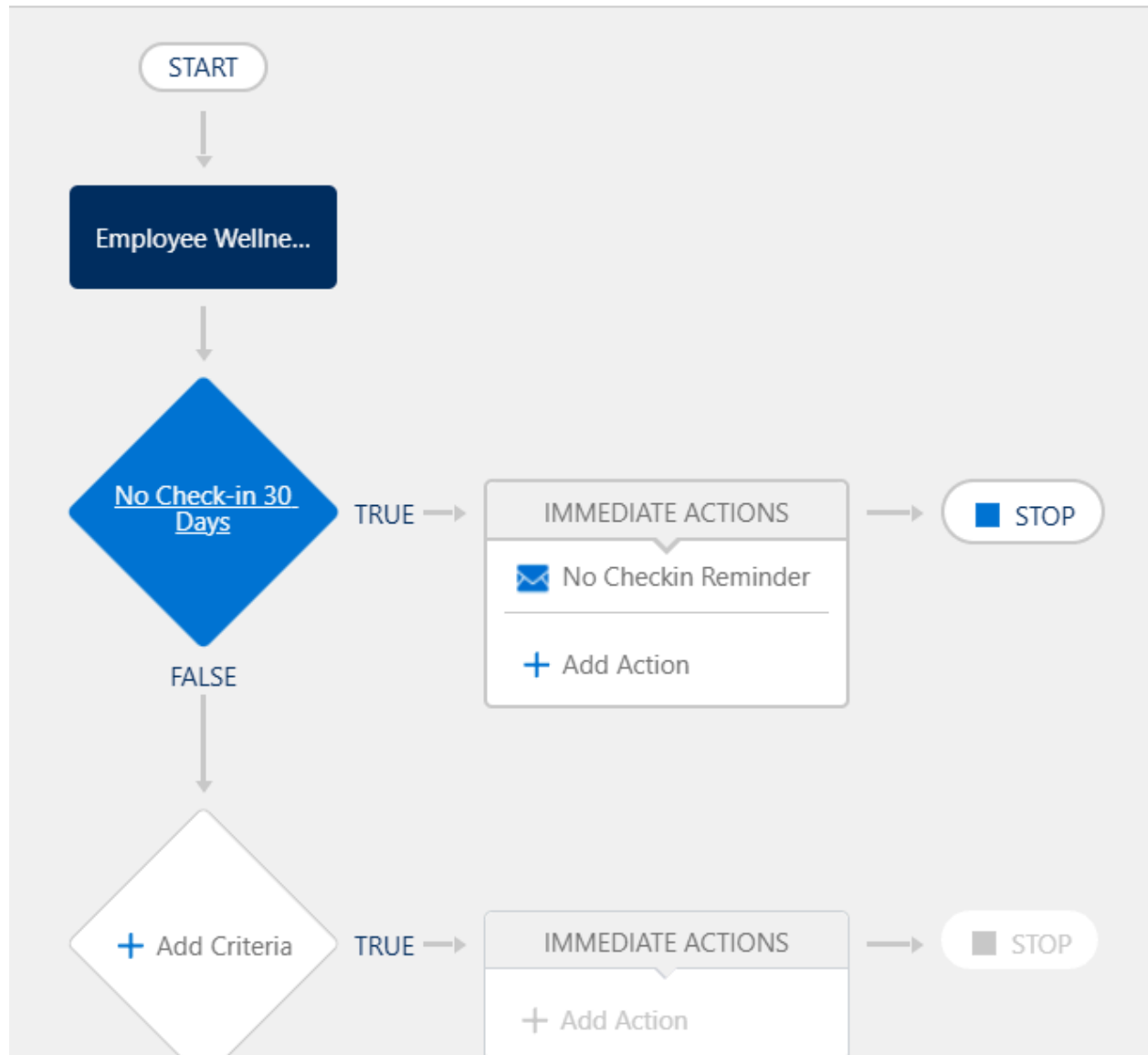   ⚠ You cannot add new time triggers to an active rule.   Deactivate This Rule

PROCESS BUILDER
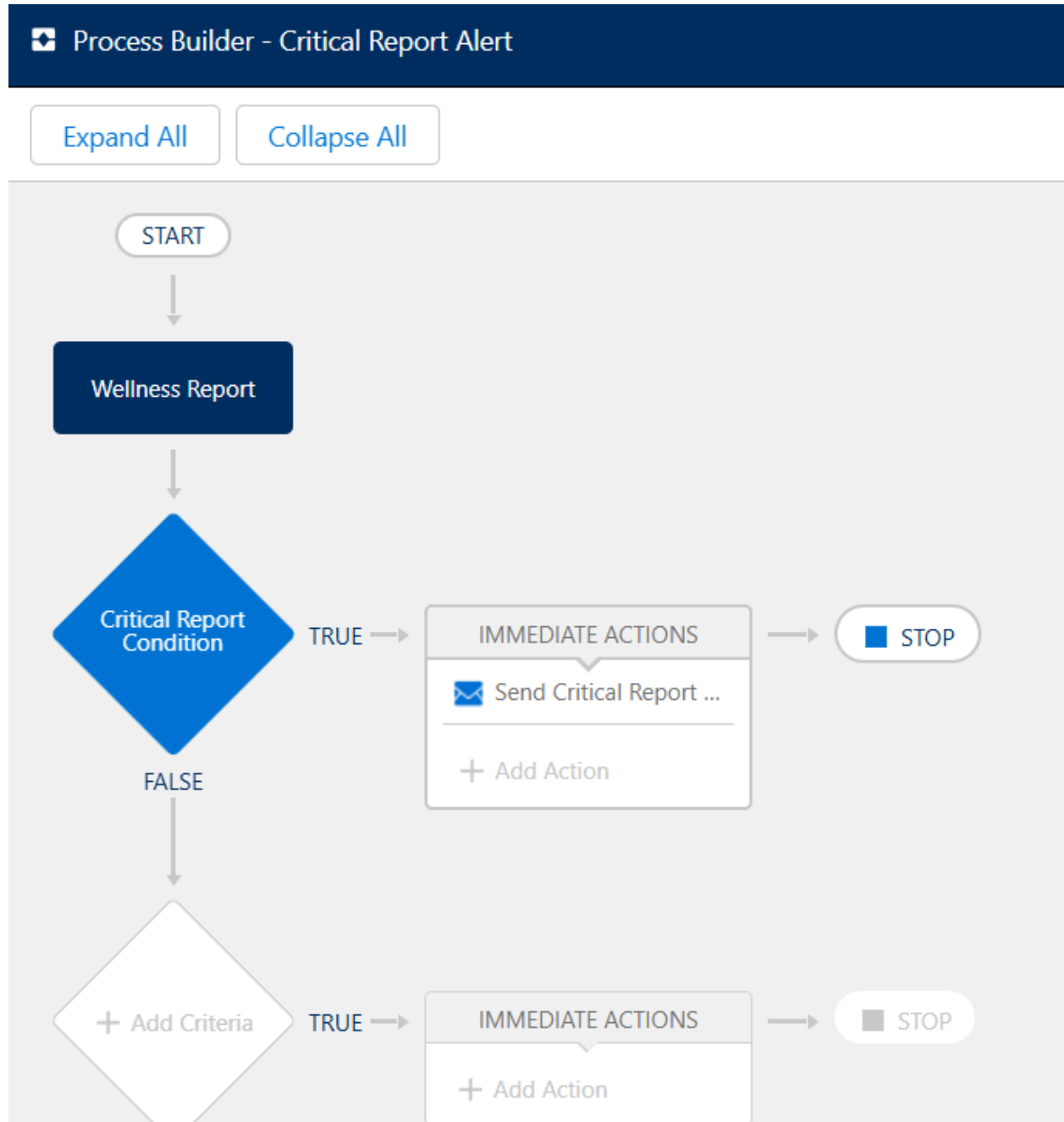
1. **Employee Wellness Automation**

2. Critical Report Alert

PROCESS CREATED :

PROCESS	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED	STATUS	ACTIONS
> Employee Wellness Automation	Automates notifications and field updates for wellnes...	Employee Wellness	Record Change	9/24/2025	Active	
> Critical Report Alert	Monitors wellness reports and sends notifications for ...	Wellness Report	Record Change	9/24/2025	Active	

APPROVAL PROCESS

1. **Employee_Wellness__c – Employee Wellness Approval**

Description:

The **Employee Wellness Approval** process ensures that employee wellness records are reviewed by the employee's manager or HR before finalizing updates. This helps maintain accurate tracking of wellness activities and ensures accountability for follow-ups when employees have not checked in or have low wellness scores.

Entry Criteria:

- Wellness Score < 50

Approver:

- Manager of the employee or HR

Actions:

- **Initial Submission:**
    - Email alert to approver
    - Field update: Status = Pending Approval
- **Approval Actions:**
    - Field update: Status = Approved
    - Email alert to employee/HR
- **Rejection Actions:**
    - Field update: Status = Rejected
    - Email alert to employee

Approval Processes

Employee Wellness: Critical Wellness Report Approval

Process Definition Detail   [Edit ▼] [Clone] [Delete]

Process Name	Critical Wellness Report Approval	Active	☐ ⓘ
Unique Name	Critical_Wellness_Report_Approval	Next Automated Approver Determined By	Manager of Record Submitter
Description	Approval process for critical wellness reports requiring manager review		
Entry Criteria	Employee Wellness: Wellness Score LESS THAN 50		
Record Editability	Administrator **ONLY**	Allow Submitters to Recall Approval Requests	☐
Approval Assignment Email Template	No_Checkin_Reminder		
Initial Submitters	Employee Wellness Owner		
Created By	Ayushi Bhanotra, 9/24/2025, 8:19 AM	Modified By	Ayushi Bhanotra, 9/24/2025, 8:38 AM

Initial Submission Actions ⓘ   [Add Existing] [Add New ▼]

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit	Remove	Field Update	Set Status to Pending Approval
Edit	Remove	Email Alert	"Notifies the manager when an employee wellness record requires approval

Final Approval Actions ⓘ   [Add Existing] [Add New ▼]

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit	Remove	Field Update	Set Status to Approved
Edit	Remove	Email Alert	Notify Employee of Approval

Final Rejection Actions ⓘ   [Add Existing] [Add New ▼]

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit	Remove	Email Alert	Notify Employee of Rejection
Edit	Remove	Field Update	Set Status to Rejected

2. **Wellness_Report__c – Critical Report Approval**

Description:
 The **Critical Report Approval** process ensures that wellness reports flagged as critical are reviewed immediately by the manager or HR. This enables proactive intervention to address high-risk cases.

Entry Criteria:

- `Wellness Score < 40`

Approver:

- Manager or HR

Actions:

- **Initial Submission:**
  - Email alert to approver
  - Field update: `Status = Pending Approval`
- **Approval Actions:**
  - Field update: `Status = Approved`
  - Email alert to submitter and stakeholders
- **Rejection Actions:**
  - Field update: `Status = Rejected`
  - Email alert to submitter

Approval Processes
Wellness Report: Critical Wellness Report Approval

« Back to Approval Process List

Help for this Page ❓

Process Definition Detail   [Edit ▾] [Clone] [Delete]

Process Name	Critical Wellness Report Approval	Active	☐ ⓘ
Unique Name	Critical_Wellness_Report_Approval	Next Automated Approver Determined By	Manager of Record Submitter
Description	Approval process for critical wellness reports requiring manager review		
Entry Criteria	Wellness Report: Score Summary LESS THAN 40		
Record Editability	Administrator **ONLY**	Allow Submitters to Recall Approval Requests	☐
Approval Assignment Email Template	Critical_Report_Template		
Initial Submitters	Wellness Report Owner		
Created By	Ayushi Bhanotra, 9/24/2025, 8:43 AM	Modified By	Ayushi Bhanotra, 9/24/2025, 8:47 AM

Initial Submission Actions ⓘ   [Add Existing] [Add New ▾]

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit | Remove	Email Alert	Notify Approver – Critical Wellness Report
Edit | Remove	Field Update	Set Status to Pending Approval

Final Approval Actions ⓘ   [Add Existing] [Add New ▾]

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit | Remove	Field Update	Set Status to Approved
Edit | Remove	Email Alert	Notify Submitter – Report Approved

Final Rejection Actions ⓘ   [Add Existing] [Add New ▾]

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit | Remove	Field Update	Set Status to Rejected
Edit | Remove	Email Alert	Notify Submitter – Report Rejected

FLOW BUILDER

1. SCREEN FLOW

Purpose:

Allows HR to manually update Employee Wellness records using a guided input form. Ensures all required fields are filled correctly before saving changes
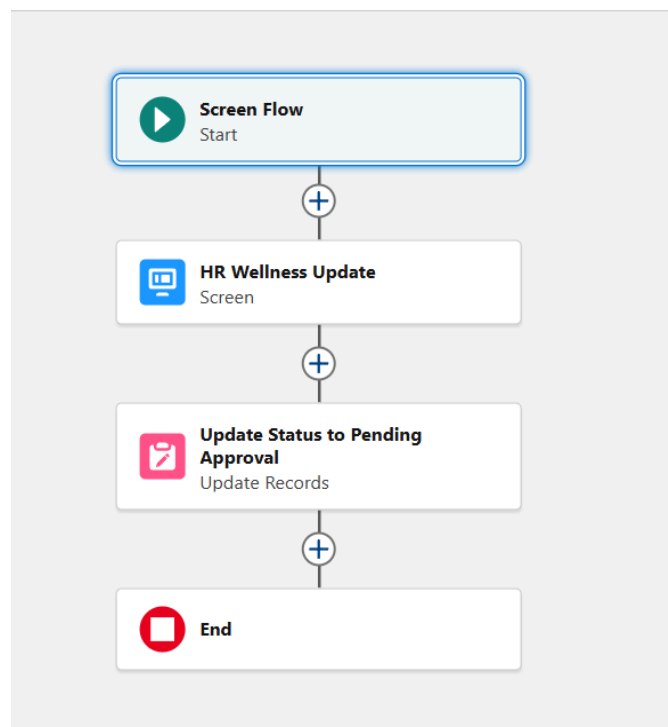
Outcome:

HR can update wellness records interactively, and the Status field is updated accurately

2. RECORD - TRIGGERED FLOW

Purpose:

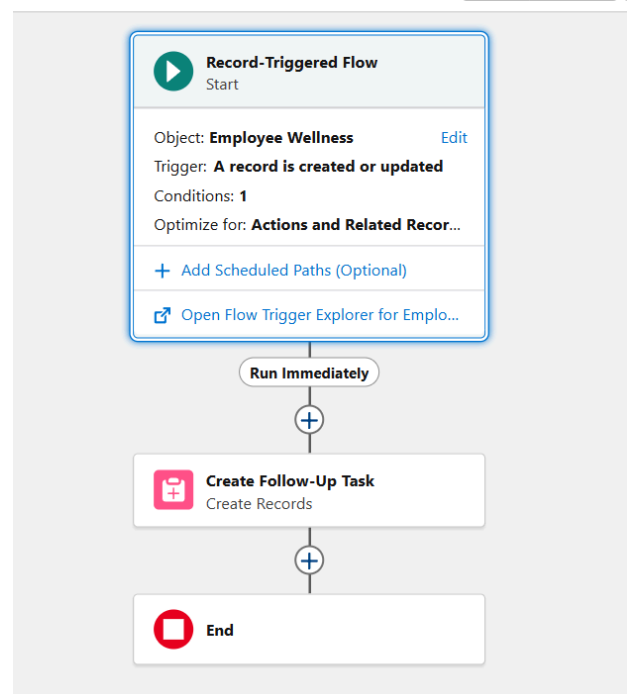Automatically creates a follow-up Task when an Employee Wellness score is below 50, ensuring HR is alerted to low wellness scores.

Outcome:

Tasks are automatically created for HR whenever an employee's wellness score is low, ensuring timely follow-up.

3. SCHEDULED FLOW

Purpose:

Sends daily reminders to employees who haven't checked in for 30+ days. Automates routine wellness monitoring.

Outcome :

Employees who haven't checked in are automatically reminded, improving engagement and data accuracy.
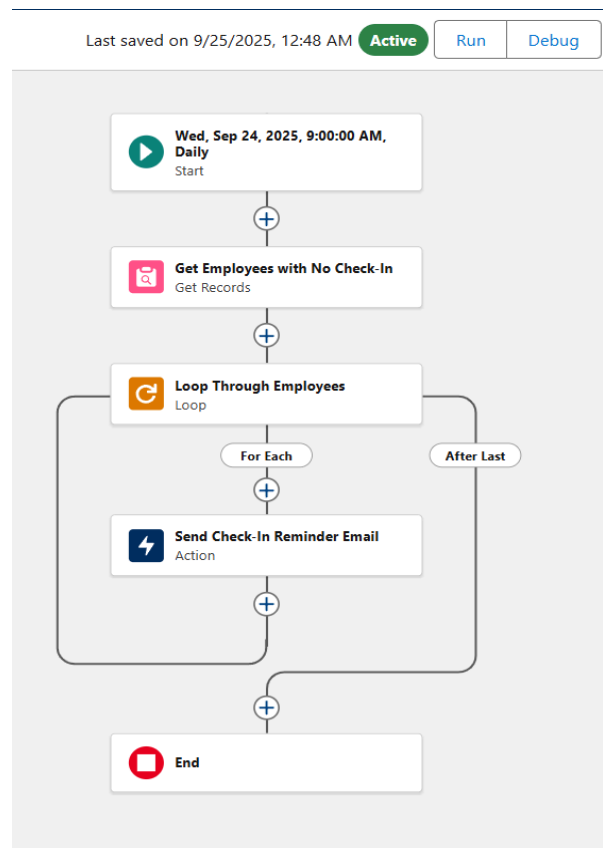
4. AUTOLAUNCHED FLOW

Purpose:

Automatically updates related Wellness Reports when an Employee Wellness record is approved, maintaining consistency across objects.

Outcome:

When a wellness record is approved, all related reports are updated automatically, ensuring synchronized status across records.
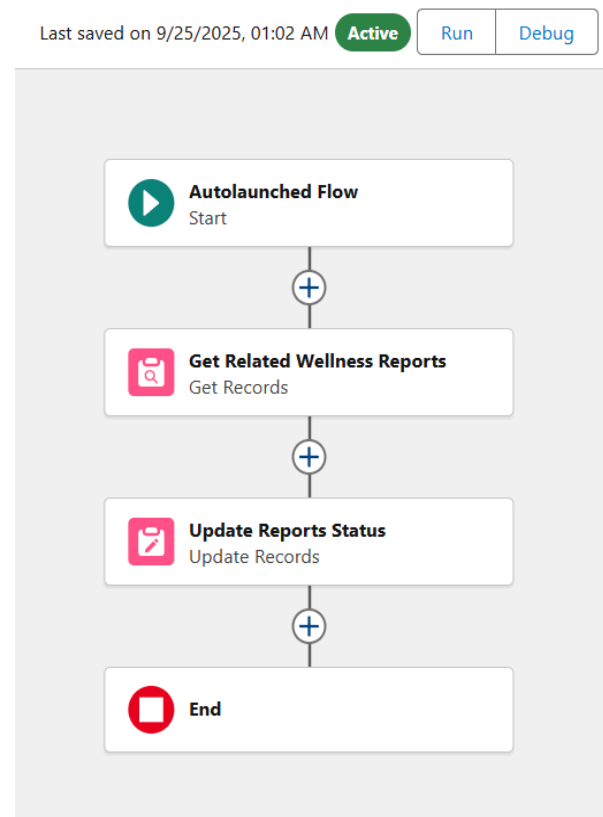
EMAIL ALERT

Object: Employee_Wellness__c

Action: Record Submitted

- **Email Template**: Employee Wellness Submission Notification
- **Recipients**: HR / Employee
- **Purpose**: Notify the approver that a wellness record has been submitted for approval

Object: Wellness_Report__c

Action: Record Approved

- **Email Template:** Critical Report Approved Notification
- **Recipients:** HR
- **Purpose:** Notify submitter and HR that the report has been approved

Object: Wellness_Report__c

- **Action:** Record Rejected
  - **Email Template:** Critical Report Rejected Notification
  - **Recipients:** HR

○ **Purpose:** Notify submitter that the report has been rejected and corrective action is needed

SETUP
Email Alerts

Email Alert
Notify Submitter – Report Rejected

🖶 Help for this Page ❓

Rules Using This Email Alert [0] | Approval Processes Using This Email Alert [1] | Entitlement Processes Using This Email Alert [0]

**Email Alert Detail** [Edit] [Delete] [Clone]

|			
Description	Notify Submitter – Report Rejected	Email Template	Critical Report Rejected Notification
Unique Name	Notify_Submitter_Report_Rejected	Object	Wellness Report
From Email Address	Current User's email address		
Recipients	User: Celia Martinez		
Additional Emails			
Created By	Ayushi Bhanotra, 9/24/2025, 8:53 AM	Modified By	Ayushi Bhanotra, 9/24/2025, 9:21 AM

[Edit] [Delete] [Clone]

Rules Using This Email Alert   Rules Using This Email Alert Help ❓

This alert is currently not used by any rules

Approval Processes Using This Email Alert   Approval Processes Using This Email Alert Help ❓

Action	Approval Process Name	Description	Type	State
Edit	Del	Critical Wellness Report Approval	Approval process for critical wellness reports requiring manager review	Wellness Report	Inactive

FIELD UPDATES

EMPLOYEE_WELLNESS__C & WELLNESS_REPORT__C

Values   [New] [Reorder] [Replace] [Printable View] [Chart Colors ▼]   Values Help ❓
[Delete Selected] [Deactivate Selected] [Replace Selected]

☐ Action	Values	API Name	Default	Chart Colors	Modified By
☐ | Edit | Del | Deactivate	Pending Approval	Pending Approval	☐	Assigned dynamically	Ayushi Bhanotra, 9/24/2025, 8:31 AM
☐ | Edit | Del | Deactivate	Approved	Approved	☐	Assigned dynamically	Ayushi Bhanotra, 9/24/2025, 8:31 AM
☐ | Edit | Del | Deactivate	Rejected	Rejected	☐	Assigned dynamically	Ayushi Bhanotra, 9/24/2025, 8:34 AM

TASK (AUTOMATED ACTIONS)

OBJECT : Employee Wellness
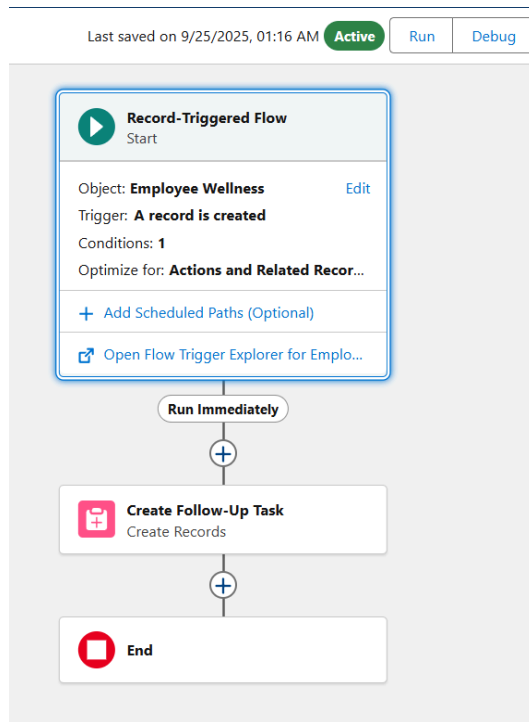
Purpose:
 Automatically assign follow-up actions to users based on business conditions, ensuring that critical tasks are completed without manual tracking.

Use Cases:

Employee Wellness: Assign a task to HR if an employee's wellness score is below 50.

Outcome:
 Tasks are automatically assigned to the appropriate users, ensuring timely follow-up on low wellness scores or rejected reports.

Steps:

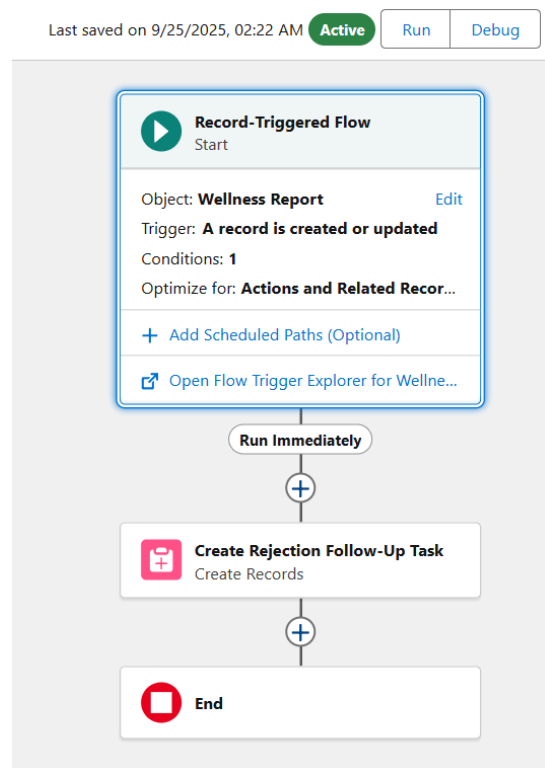1. **Trigger:** Record-Triggered Flow on `Employee_Wellness__c` when created or updated.
2. **Entry Condition:** `Wellness_Score__c < 50`.
3. **Create Task:**
   - Subject: "Follow-Up Wellness Check"
   - Assigned To: HR user/queue
   - Related To: Employee_Wellness record
   - Due Date: Today + 2 days
   - Priority: High / Normal
4. **Send Custom Notification:**
   - Notification Type: `Wellness Alert`

- Recipient: HR user
- Title/Body: Alert about critical wellness score

5. **Activate Flow**

OBJECT : Wellness Report

Last saved on 9/25/2025, 02:22 AM **Active** | Run | Debug

Record-Triggered Flow Start

Object: **Wellness Report**   Edit
Trigger: **A record is created or updated**
Conditions: **1**
Optimize for: **Actions and Related Recor...**

+ Add Scheduled Paths (Optional)

↗ Open Flow Trigger Explorer for Wellne...

Run Immediately

Create Rejection Follow-Up Task Create Records

End

Purpose:

Notify employees and assign follow-up tasks when reports are approved or rejected.

Use Case:

Wellness Report**:** Assign a task to the employee if a report is rejected.

Outcome:

Employees and HR get instant notifications and follow-up tasks for timely action.

Steps:

1. **Trigger:** Record-Triggered Flow on `Wellness_Report__c` when created or updated.
2. **Entry Condition:** `Status__c = Rejected` (or Approved for notifications)
3. **Create Task:**
   - Subject: "Follow-Up on Rejected Wellness Report"
   - Assigned To: Employee or HR
   - Related To: Wellness_Report record
   - Due Date: Today + 2 days
   - Priority: High

4. **Send Custom Notification:**
    ○ Notification Type: `Wellness Report Alert`
    ○ Recipient: Employee (submitter)
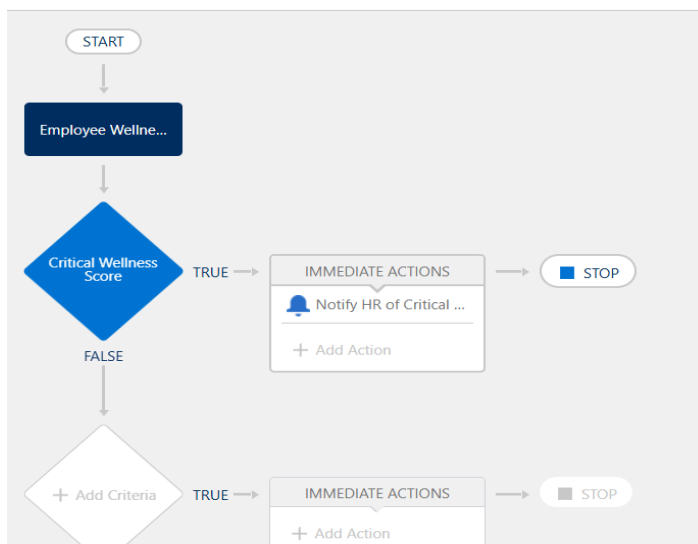   ○ Title/Body: Alert about report approval or rejection
5. **Activate Flow**

CUSTOM NOTIFICATIONS (By Process Builder)

Purpose:

Custom Notifications allow Salesforce to send **in-app alerts** to users when important events occur, ensuring timely awareness and action.

Employee Wellness: Notify HR when an employee's wellness score is critically low.

Outcome:

HR users receive instant in-app notifications when an employee's wellness score is critically low, enabling prompt follow-up.
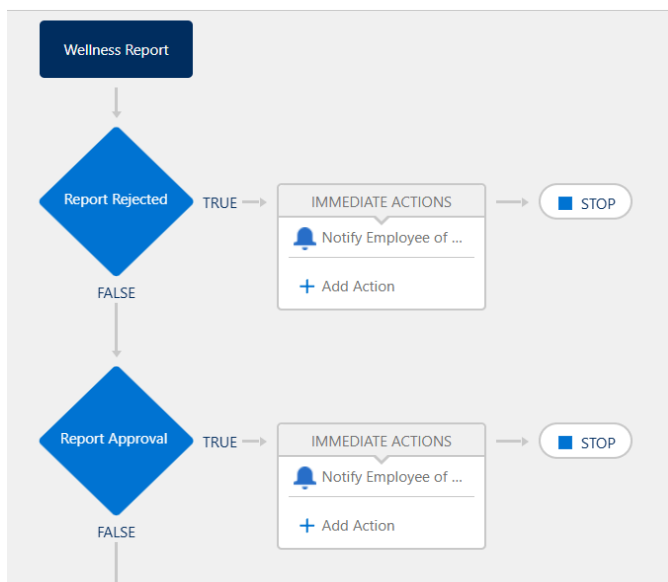
Steps:

1. Go to **Setup → Process Builder → New Process**.
2. **Select Object:** `Employee_Wellness__c`
3. **Trigger:** When a record is **created or updated**
4. **Define Criteria:** `Wellness_Score__c < 40` (or your threshold)

5. **Add Immediate Action → Send Custom Notification:**
    - **Notification Type:** `Wellness Alert`
    - **Recipient:** HR user/queue
    - **Title:** `Critical Wellness Score Alert`
    - **Body:** `Employee {!Employee_Name__c} has a Wellness Score < 40. Please follow up.`
6. **Save & Activate**

Wellness Report: Notify employees when their report is approved or rejected

Outcome:

Employees receive immediate in-app notifications when their report is approved or rejected, keeping them informed and enabling timely corrective action if needed.

Steps:

1. Go to **Setup → Process Builder → New Process**
2. **Select Object:** `Wellness_Report__c`
3. **Trigger:** When a record is **created or updated**
4. **Define Criteria:** `Status__c = Approved` or `Status__c = Rejected`
5. **Add Immediate Action → Send Custom Notification:**
    - **Notification Type:** `Wellness Report Alert`
    - **Recipient:** Employee (submitter)
    - **Title:** `Wellness Report Approved/Rejected`

- ○ **Body:** `Your Wellness Report has been {!Status__c}.`
6. **Save & Activate**