

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

[Help for this Page](#)

[Back to Employee Wellness](#)

Validation Rule Detail

Edit

Clone

Rule Name	Wellness_Score_Range	Active	<input checked="" type="checkbox"/>
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

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Rule 2: Report Date Future (Wellness_Report__c)

Wellness Report Validation Rule

[Help for this Page](#)

[Back to Wellness Report](#)

Validation Rule Detail

Edit

Clone

Rule Name	Report_Date_Future	Active	<input checked="" type="checkbox"/>
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

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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

EditCloneDeactivate

Rule Name	Remind_No_Checkin_30_Days	Object	Employee Wellness
Active	<input checked="" type="checkbox"/>	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 Rhanotra, 9/24/2025, 5:15 AM	Modified By	Ayushi Rhanotra, 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

EditCloneDeactivate

Rule Name	Critical_Report_Alert	Object	Wellness Report
Active	<input checked="" type="checkbox"/>	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 Rhanotra, 9/24/2025, 5:44 AM	Modified By	Ayushi Rhanotra, 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](#)

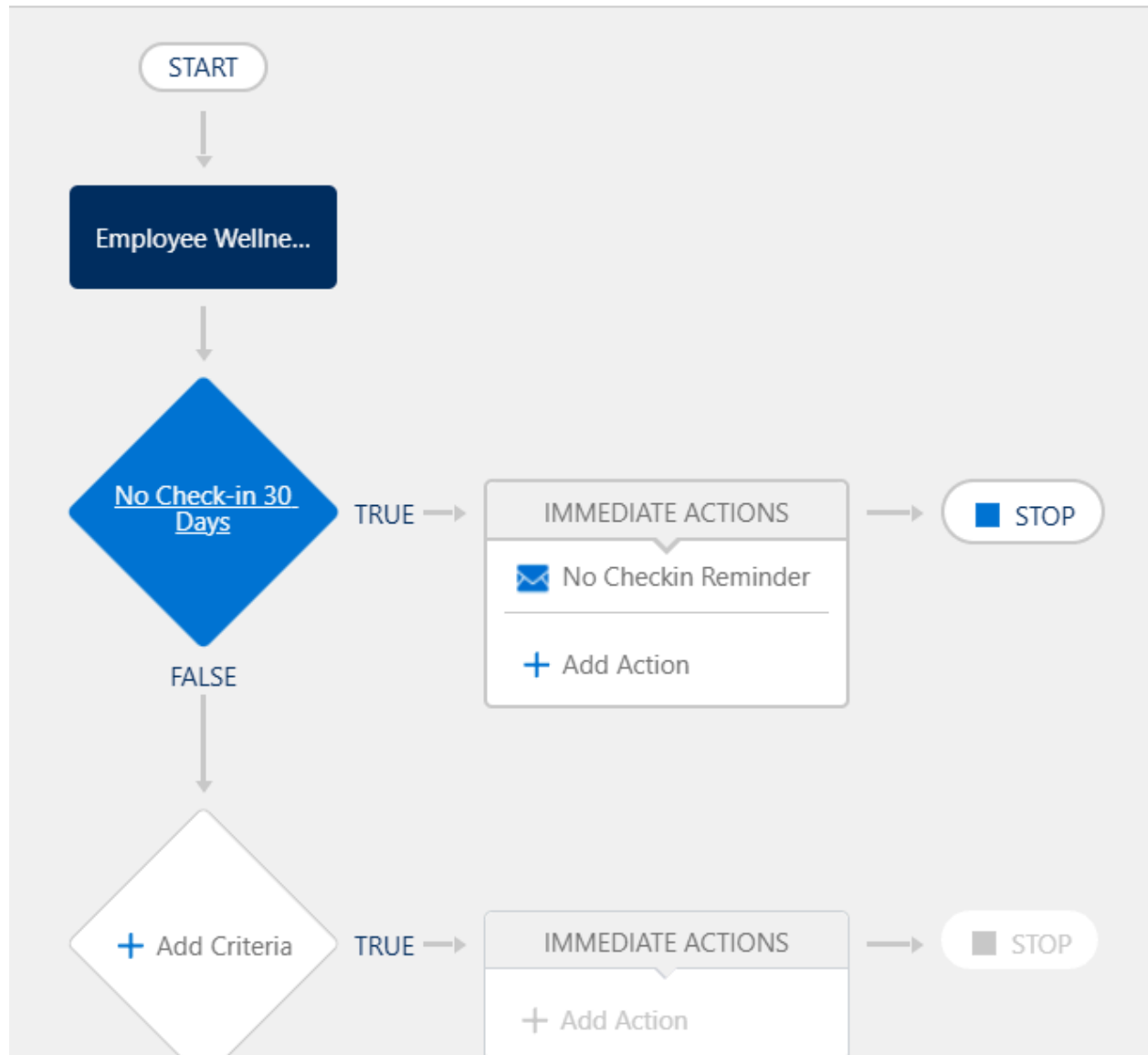
PROCESS BUILDER

1. Employee Wellness Automation

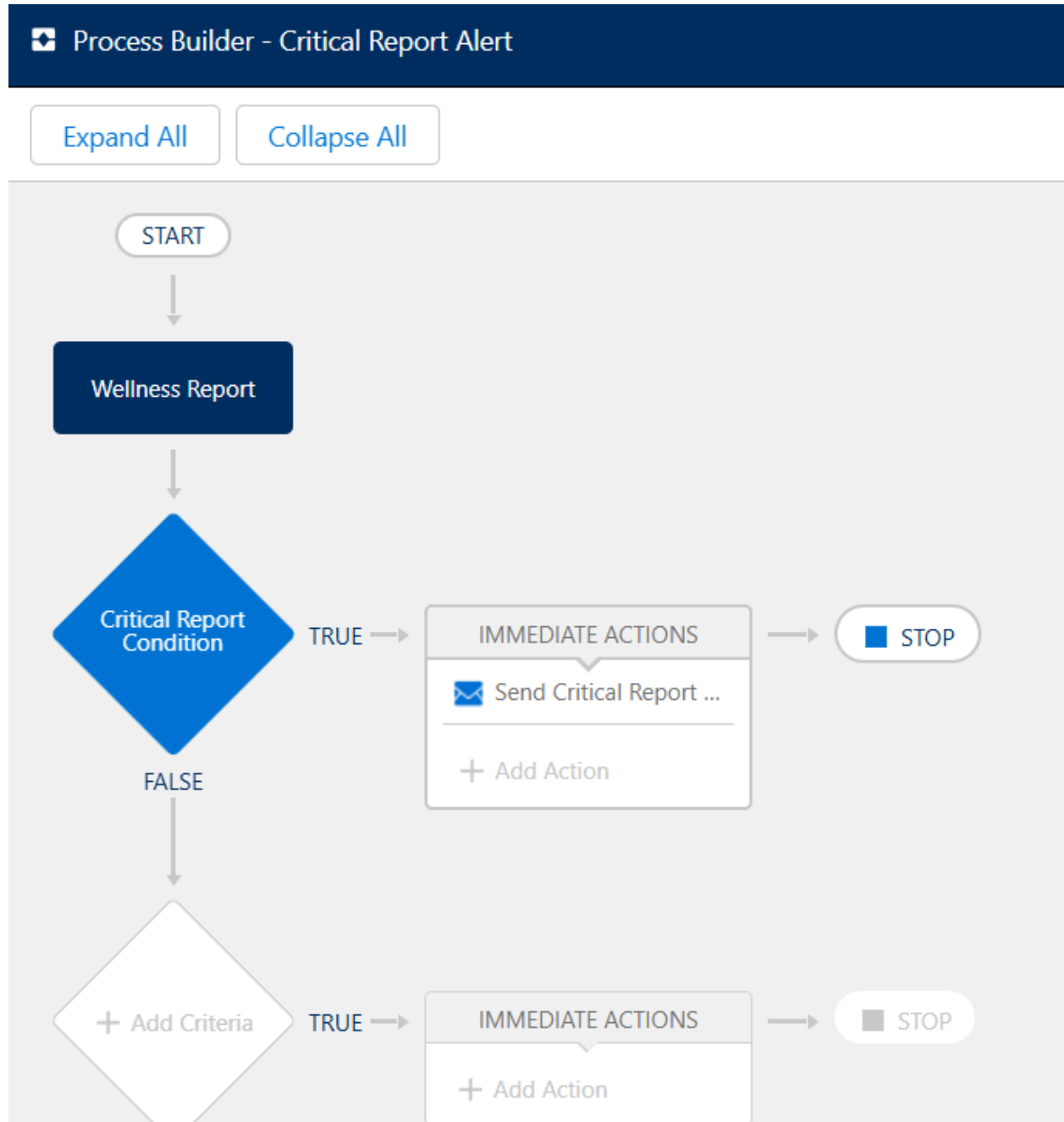
Process Builder - Employee Wellness Automation

Expand All

Collapse All



2. Critical Report Alert



PROCESS CREATED :

Process Builder

Back To Setup

Help

My Processes

2 items

New

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



SETUP

Approval Processes

Approval Processes

[Help for this Page](#) ?

Employee Wellness: Critical Wellness Report Approval

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Process Definition Detail

[Edit](#) [Clone](#) [Delete](#)

Process Name	Critical Wellness Report Approval	Active	<input type="checkbox"/> i
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	<input type="checkbox"/>
Approval Assignment Email Template	<u>No_Checkin_Reminder</u>		
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 [i](#)[Add Existing](#) [Add New](#) ▼

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

Final Approval Actions [i](#)[Add Existing](#) [Add New](#) ▼

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

Final Rejection Actions [i](#)[Add Existing](#) [Add New](#) ▼

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

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



SETUP

Approval Processes

Approval Processes

[Help for this Page](#) ?

Wellness Report: Critical Wellness Report Approval

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Process Definition Detail

Edit ▼

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Delete

Process Name	Critical Wellness Report Approval	Active	<input type="checkbox"/> i
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	<input type="checkbox"/>
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 [i](#)

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 [i](#)

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 [i](#)

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

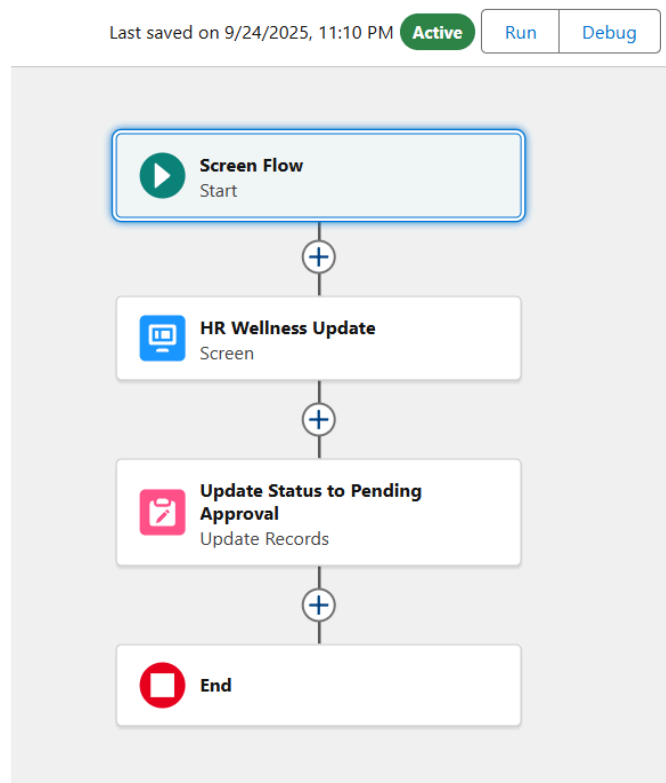
1. SCREEN FLOW

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



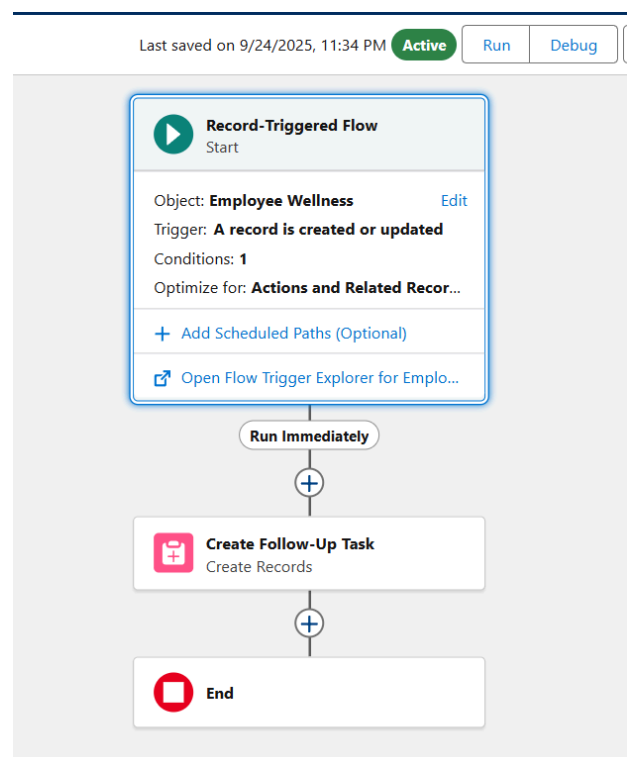
2. RECORD - TRIGGERED FLOW

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.



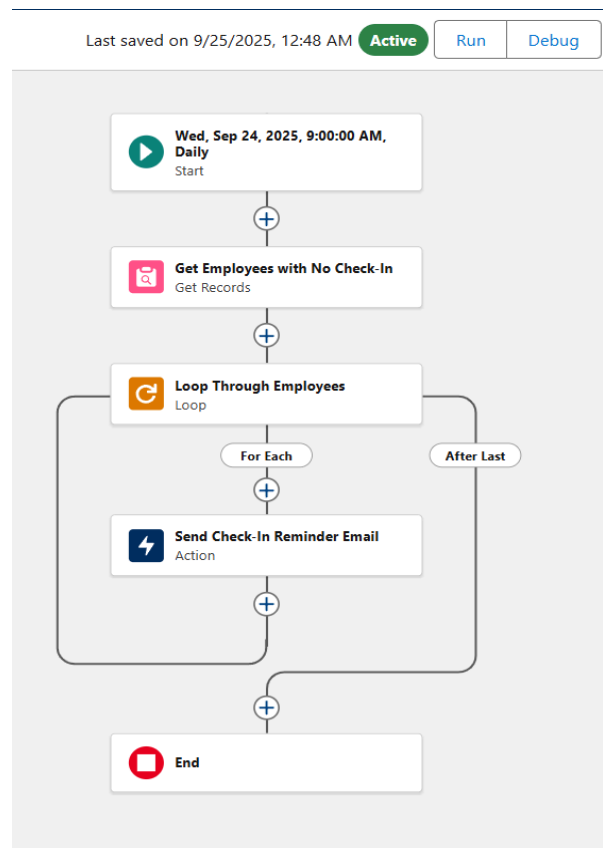
3. SCHEDULED FLOW

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.



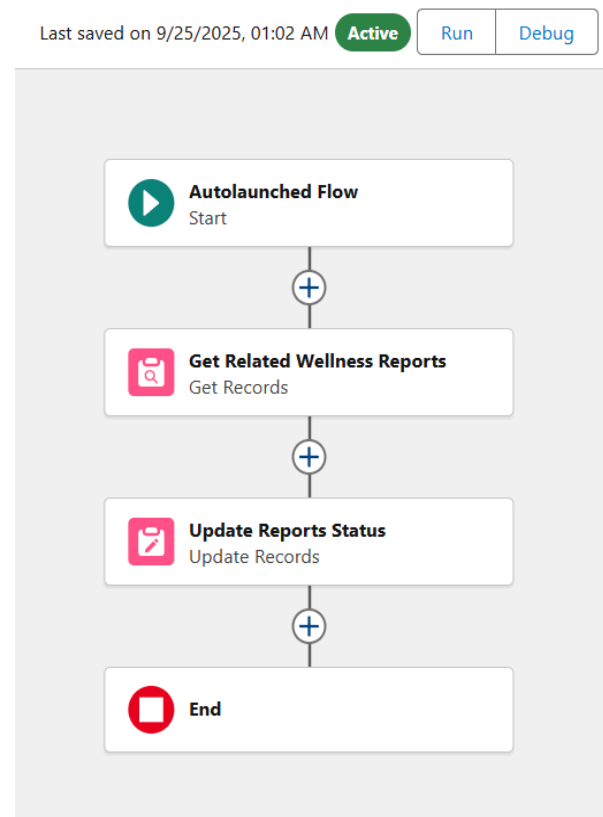
4. AUTOLAUNCHED FLOW

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



SETUP
Email Alerts

Email Alert

"Notifies the manager when an employee wellness record requires approval">

Rules Using This Email Alert (0) | Approval Processes Using This Email Alert (1) | Entitlement Processes Using This Email Alert (0)

Email Alert Detail

EditDeleteClone

Description	"Notifies the manager when an employee wellness record requires approval	Email Template	Employee Wellness Submission Notification
Unique Name	Employee_Wellness_Approval_Alert	Object	Employee Wellness
From Email Address	Current User's email address		
Recipients	User: Celia Martinez User: Ana Huang		
Additional Emails			
Created By	Ayushi Bhanotra, 9/24/2025, 8:22 AM	Modified By	Ayushi Bhanotra, 9/24/2025, 9:31 AM

EditDeleteClone

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	Employee Wellness	Inactive

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

 **SETUP**
Email Alerts

Email Alert

Notify Submitter – Report Approved

 [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

EditDeleteClone

Description	Notify Submitter – Report Approved	Email Template	Critical Report Approved Notification
Unique Name	Notify_Submitter_Report_Approved	Object	Wellness Report
From Email Address	Current User's email address		
Recipients	User: Celia Martinez		
Additional Emails			
Created By	Ayushi Bhanotra , 9/24/2025, 8:51 AM	Modified By	Ayushi Bhanotra , 9/24/2025, 9:19 AM


EditDeleteClone

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

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

EditDeleteClone

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

EditDeleteClone

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

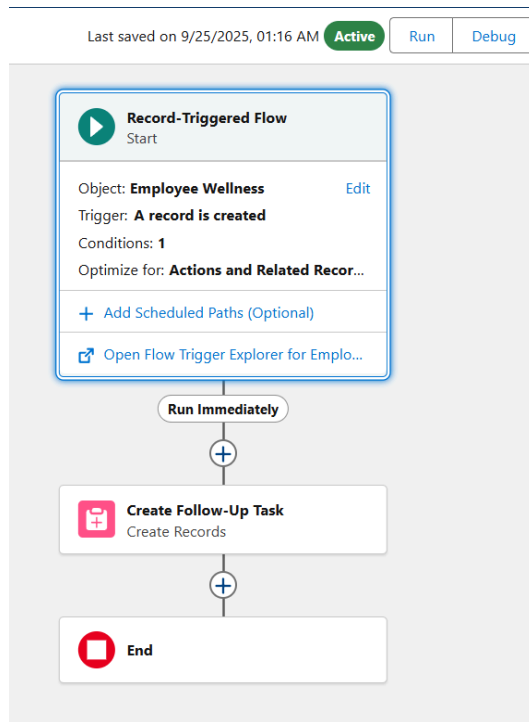
NewReorderReplacePrintable ViewChart Colors ?

Delete SelectedDeactivate SelectedReplace Selected

<input type="checkbox"/> Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	Pending Approval	Pending Approval	<input type="checkbox"/>	Assigned dynamically	Ayushi Bhanotra, 9/24/2025, 8:31 AM
<input type="checkbox"/> Edit Del Deactivate	Approved	Approved	<input type="checkbox"/>	Assigned dynamically	Ayushi Bhanotra, 9/24/2025, 8:31 AM
<input type="checkbox"/> Edit Del Deactivate	Rejected	Rejected	<input type="checkbox"/>	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.

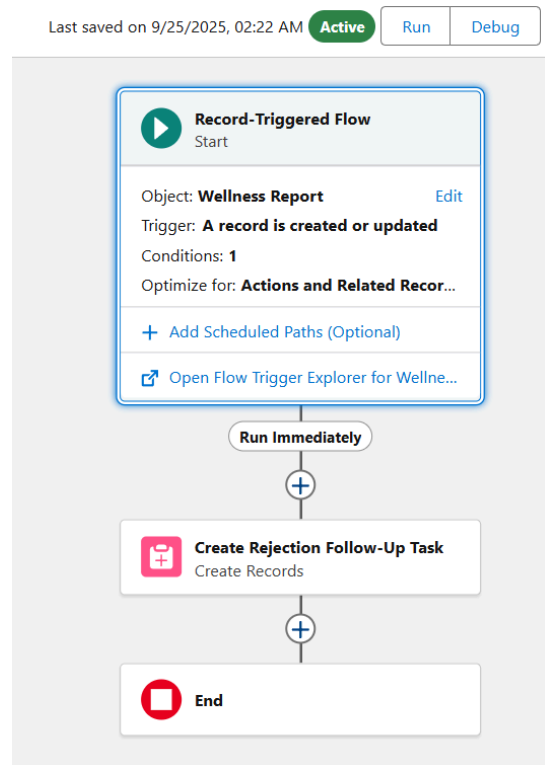
Steps:

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



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

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 :

Create a Record-Triggered Flow

- Object: **Employee_Wellness__c**
- Trigger: When a record is created or updated
- Condition: **Wellness_Score__c < 40**

Get Records: Fetch HR Users

- Object: **User**
- Conditions:
 - Role = HR
 - Active = True

- Store all records in a collection variable `{!Get_HR_Users}`

Create a Text Collection Variable

- API Name: `HR_User_IDs`
- Data Type: Text
- Allow multiple values: ☒ Yes

Loop Through HR Users

- Loop element: `Loop HR Users`
- Collection Variable: `{!Get_HR_Users}`

Assignment: Add User IDs to Collection

- Assignment element: `Add HR User ID to Collection`
- Variable: `{!HR_User_IDs}`
- Operator: Add
- Value: `Current Item from Loop HR Users → User ID`

Send Custom Notification

- Notification Type: `Wellness Alert`
- Notification Body: `Employee {!$Record.Employee_Name__c} has a Wellness Score < 40. Please follow up.`
- Notification Title: `Critical Wellness Score Alert`
- Recipient IDs: `{!HR_User_IDs}`
- Target ID: `{!$Record.Id}`
- Sender ID: `{!$User.Id}`
- Target Page Reference:
`/lightning/r/Employee_Wellness__c/{!$Record.Id}/view`

Save and Activate the Flow

Last saved on 9/25/2025, 07:10 PM

Active

Run

