

## Phase 4: Process Automation (Admin)

## 1. Validation Rules

Purpose: Ensure accurate and complete employee data during onboarding. Examples:

Prevent saving the employee record without mandatory fields like Email, Date of Joining, or Department.

Ensure Employee ID follows a standard format (e.g., EMP-XXXX).

Validation Rules					New
2 Items, Sorted by Rule Name					
Rule Name	Error Location	Error Message	Active	Modified By	
Email_Required	Email	Email is required	✓	New Hire, 9/21/2025, 3:41 AM	▼
Employee_ID_Format	Employee ID	Employee ID must follow EMP-XXXX format	✓	New Hire, 9/21/2025, 3:42 AM	▼

## 2. Workflow Rules

Purpose: Automate repetitive onboarding tasks. Examples:

Send a welcome email to new employees when the record is created.

Notify HR when the background verification is complete.

Automatically update the Onboarding Status field to “Documents Pending” when certain criteria are met.

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Other

All

New Rule

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Activate</a>	<a href="#">New_Employee_Onboarding</a>		Employee	<input type="checkbox"/>

### 3. Process Builder

Purpose: Automate multi-step onboarding processes. Examples:

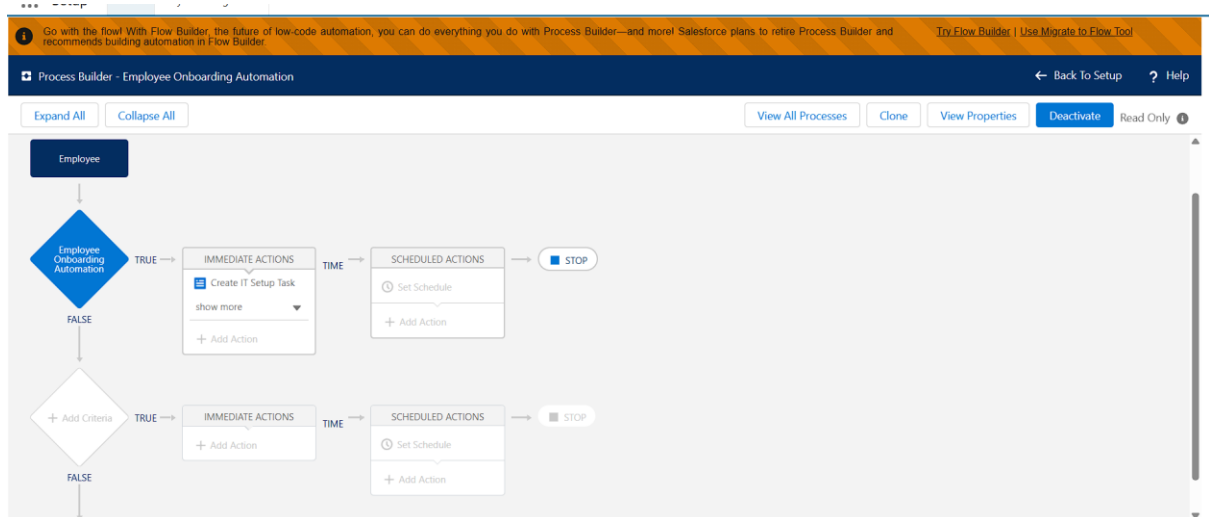
When an employee is marked “Active”:

Assign a mentor.

Create IT setup tasks (laptop, email, access).

Send a notification to Finance for payroll setup.

Automatically update probation period end date based on joining date.



#### 4. Approval Process

Purpose: Manage approvals required for onboarding steps. Examples:

Manager approval for role assignment or workstation allocation.

HR approval for background verification completion.

Multi-step approval for salary setup or benefits enrolment.

**Process Definition Detail**

Process Name	Approval Process for the Employee	Active	<input type="checkbox"/>
Unique Name	Approval_Process_for_the_Employee	Next Automated Approver Determined By	
Description			
Entry Criteria	Employee: Onboarding Status EQUALS In Progress		
Record Editability	Administrator <b>ONLY</b>	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Employee Owner	Created By	New Hire: 9/22/2025, 7:25 AM
		Modified By	New Hire: 9/22/2025, 7:25 AM

**Initial Submission Actions**

Action	Type	Description
Record Lock		Lock the record from being edited

**Approval Steps**

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Step 1	1	Approval based on first response	User: HR Manager: Khyati Palamsetti		Final Rejection	

#### 5. Flow Builder

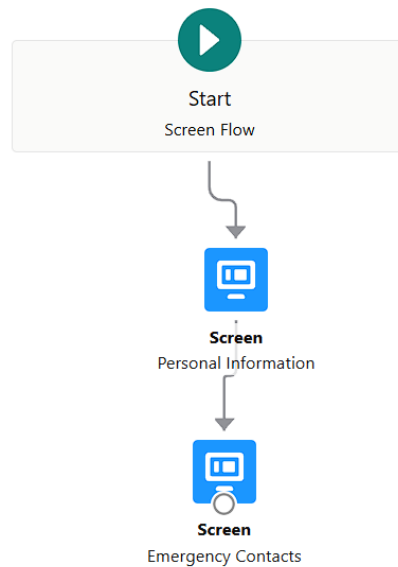
Purpose: Handle complex or interactive onboarding automation. Examples:

Screen Flow: New hire fills out forms for benefits, personal details, and emergency contacts.

Record-Triggered Flow: When an employee record is created, automatically assign tasks to IT, HR, and Facilities.

Scheduled Flow: Send reminders to managers about pending approvals or pending training assignments.

Auto-Launched Flow: Update employee status automatically when all onboarding tasks are completed.



## 6. Email Alerts

Purpose: Notify stakeholders about onboarding progress. Examples:

Welcome email to the new hire with onboarding instructions.

Alert HR if a manager has not approved a new hire within 3 days.

Notify IT about new accounts that need to be created.

**SETUP**  
**Email Alerts**

Email Alert  
**New Employee Welcome Email**

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

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

Description	New Employee Welcome Email	Email Template	New Employee Welcome Email
Unique Name	New_Employee_Welcome_Email	Object	Employee
From Email Address	Current User's email address		
Recipients	Email Field: Email		
Additional Emails			
Created By	New Hire, 9/22/2025, 6:05 AM	Modified By	New Hire, 9/22/2025, 6:05 AM

[Edit] [Delete] [Clone]

**Rules Using This Email Alert** [Rules Using This Email Alert Help ?]

Action	Rule Name	Description	Object	Active
[Edit] [Del] [Activate]	New_Employee_Onboarding		Employee	<input type="checkbox"/>

**Approval Processes Using This Email Alert** [Approval Processes Using This Email Alert Help ?]

This alert is currently not used by any approval processes

**Entitlement Processes Using This Email Alert**

This alert is currently not used by any entitlement processes

## 7. Field Updates

Purpose: Keep employee records current automatically. Examples:

Set Onboarding Status to “Completed” when all tasks are done.

Update Training Status to “Pending” when training sessions are scheduled.

## 8. Tasks

Purpose: Automate task creation for stakeholders. Examples:

Create a task for IT to set up a laptop and system access.

Assign a task to HR to schedule induction sessions.

Remind managers to assign mentors to new employees.

Buttons, Links, and Actions					
8 Items, Sorted by Label					
			Q Quick Find		New Action New Button or Link
LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Accept	Accept			Standard page	▼
Clone	Clone			Standard page	▼
Delete	Delete			Standard page	▼
Edit	Edit			Standard page	▼
Employees Tab	Tab			Standard page	▼
List	List			Standard page	▼
New	New			Standard page	▼
View	View			Standard page	▼

## 9. Custom Notifications

Purpose: Provide real-time in-app alerts. Examples:

Notify managers when a new employee joins their team.

Notify employees when HR uploads onboarding documents for them.

Notify IT when equipment requests are generated.

SETUP Custom Notifications					
<p><b>When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.</b></p>					
Custom Notification Types					New
Send custom notifications using <a href="#">Flows</a> or <a href="#">Process Builder</a>					
NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE	
Employee Notification	Employee_Notification		✓	✓	▼
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓		▼
IT Notification	IT_Notification		✓	✓	▼
Manager Notification	Manager_Notification		✓	✓	▼
New Employee Notification	New_Employee_Notification		✓	✓	▼