Phase 4 — Automation & Workflows

Plan Automation

- Trigger: New Employee record creation.
- Actions:
    - Create default Onboarding Tasks for each new Employee.
    - Send email notifications to Employee and Manager.
    - (Optional) Start approval process for onboarding documents.
- Conditions: Can be department-specific or role-specific.

Create Default Onboarding Tasks with Flow

1. Navigate to: Setup → Flows → New Flow
2. Select: Record-Triggered Flow → Create.
3. Configure Trigger:
    - Object: `Employee__c`
    - Trigger: When a record is created
    - Entry Conditions: Optional (e.g., Department = HR)
4. Add Element: Create Records

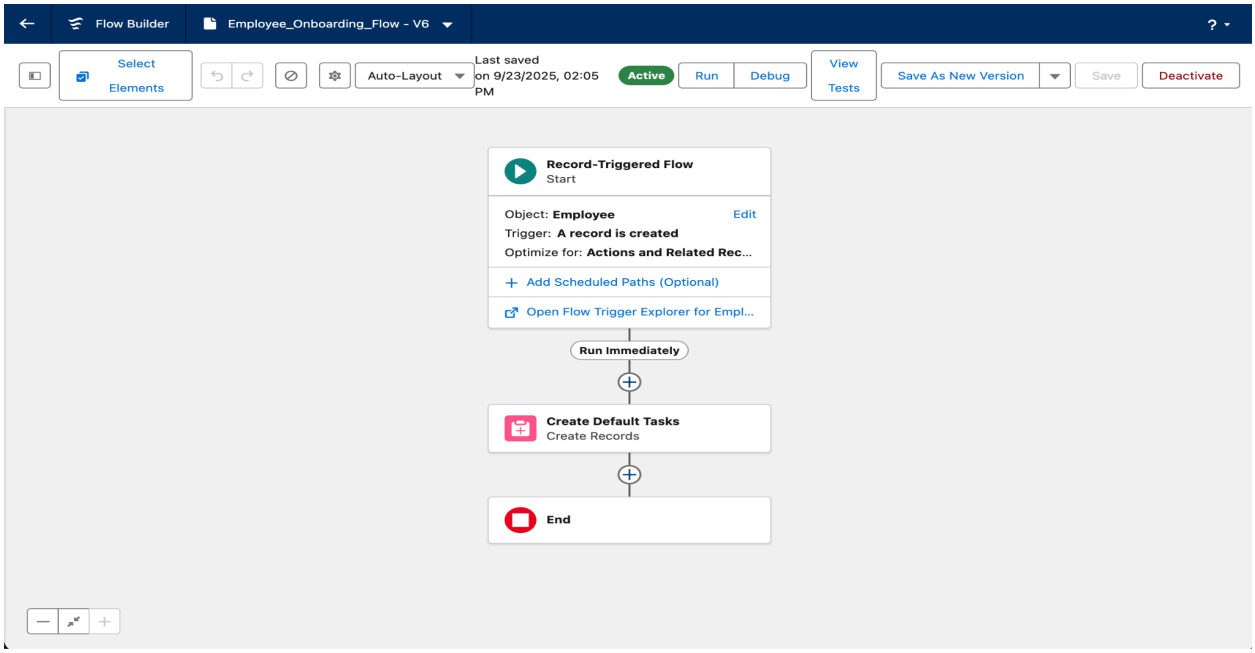
- Label: *Create Default Tasks*
- Object: `OnboardingTask__c`
- Field Mapping:

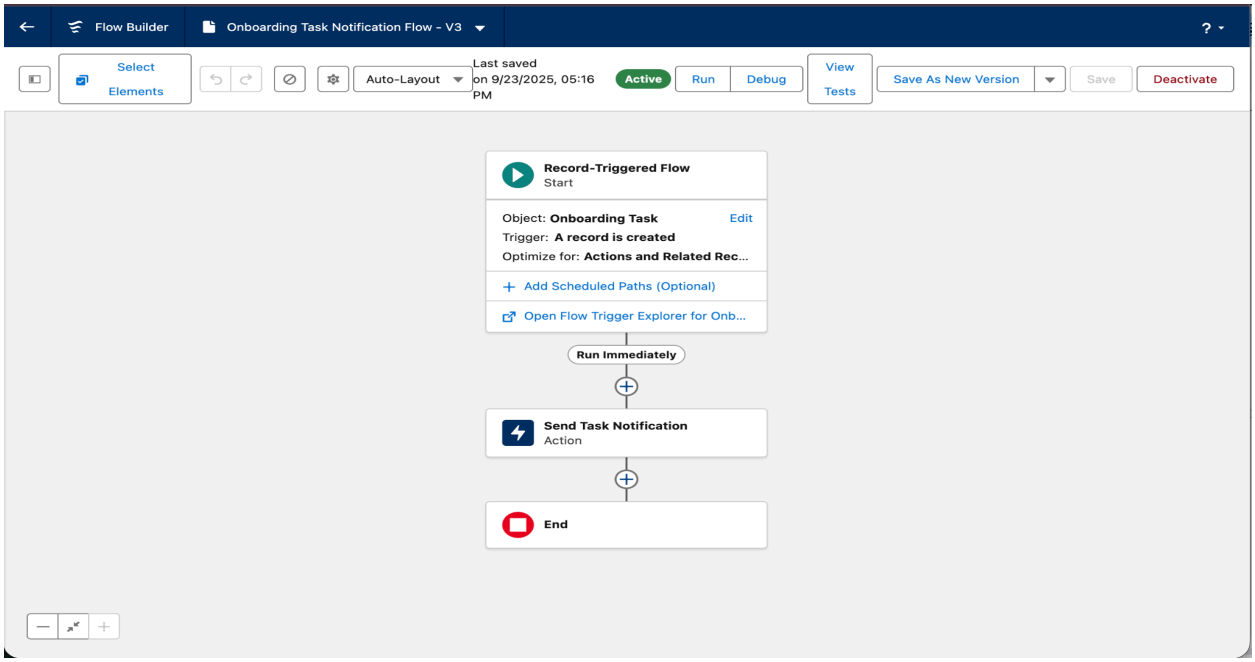
5.

Field	Value
Task Name	e.g., “Complete ID Form”
Assigned Employee	`$Record.Id`
Status	Not Started
Due Date	`Today() + 7`

6.

7. Save and Activate the Flow.





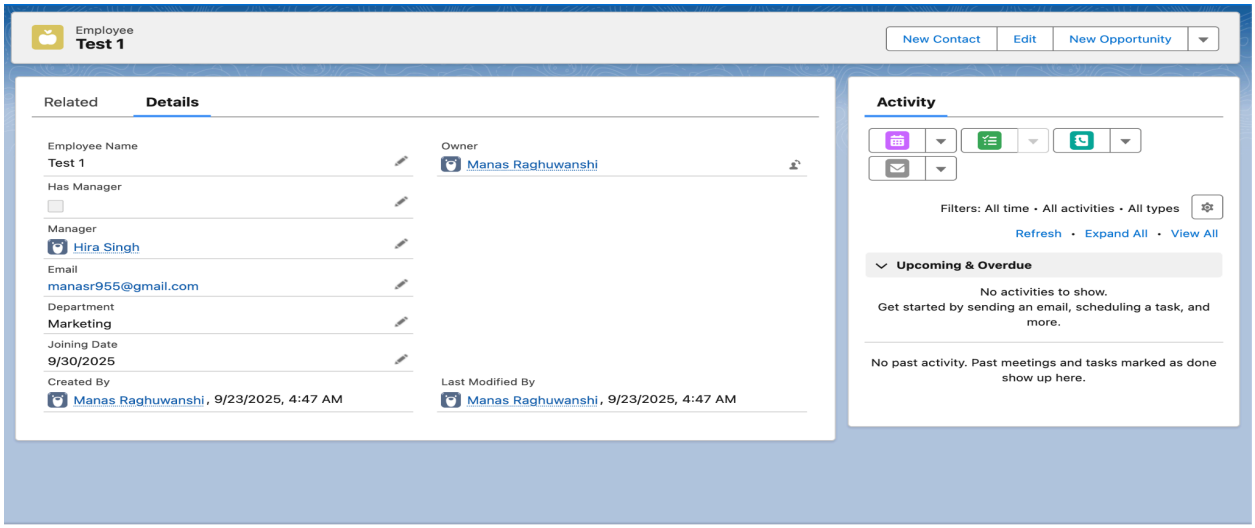
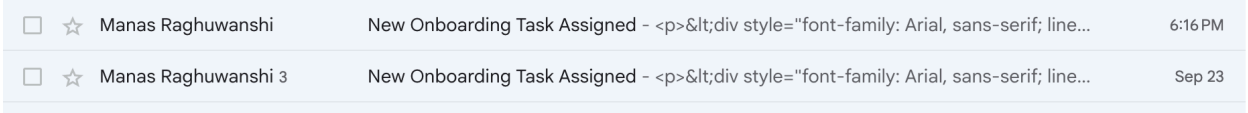
Test Automation

- Create a new Employee record.
- Check the Onboarding Tasks related list: Default tasks should be created automatically.
- Verify email notifications are received by Employee and Manager.

Navigate: Setup → Approval ProcessDocument Approval Processes → Document__c → New Approval Process.

1. Use Standard Wizard.
2. Configure:

- Entry Criteria: `Status__c = Pending`
- Approver: Employee's Manager (`Manager__c`)
- Approval Action: Set `Status__c = Approved`
- Rejection Action: Set `Status__c = Rejected`

Verify Setup

- Create a new **Employee** record and confirm:
  - Default Onboarding Tasks are created.
  - Emails are triggered.
  - Document approval process works (if enabled).
- Ensure related lists show proper records.