

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.
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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

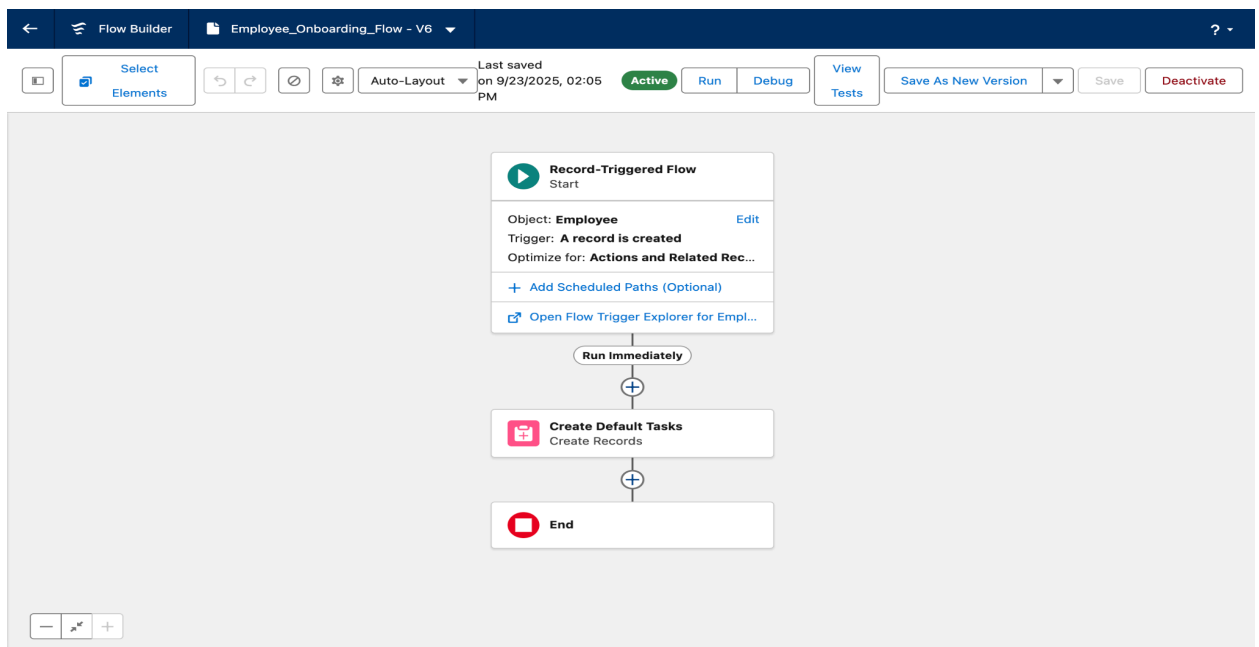
- Label: *Create Default Tasks*
- Object: **OnboardingTask__c**
- Field Mapping:

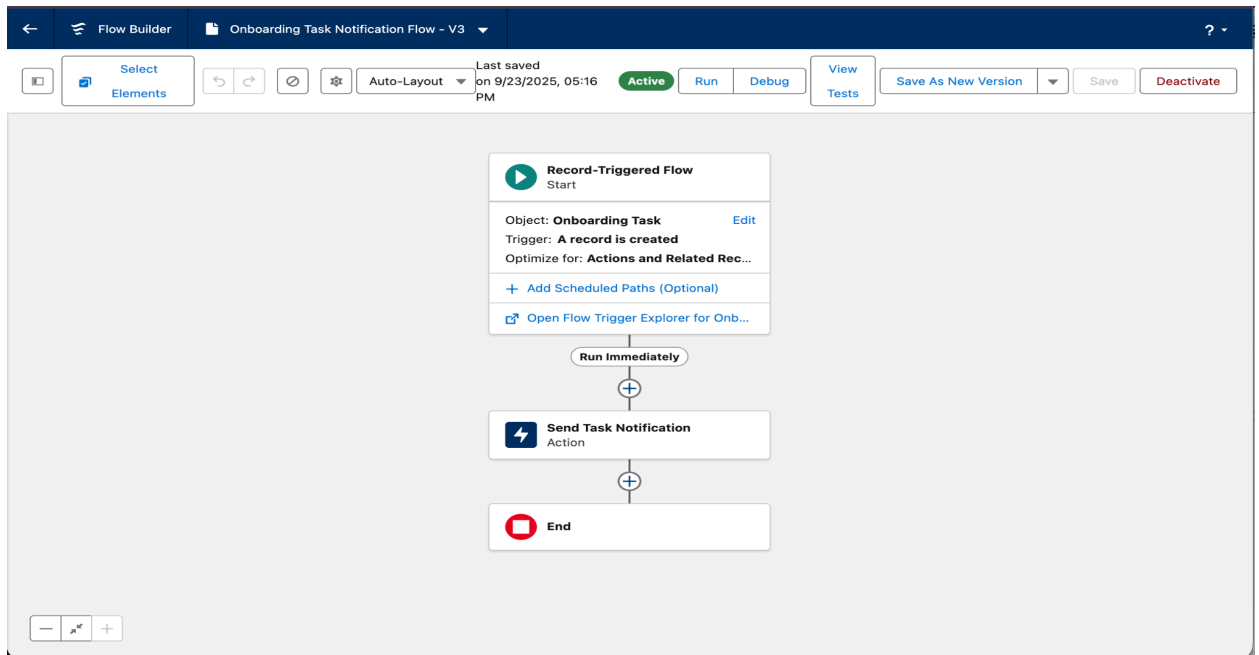
5.

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.

The screenshot shows the Salesforce interface for an Employee record named 'Test 1'. The record is owned by Manas Raghuwanshi. The 'Details' tab is active, showing fields for Employee Name, Has Manager, Manager (Hira Singh), Email (manasr955@gmail.com), Department (Marketing), and Joining Date (9/30/2025). The 'Activity' panel on the right shows filters for 'All time', 'All activities', and 'All types', with options to 'Refresh', 'Expand All', and 'View All'. Below the activity panel, there is a section for 'Upcoming & Overdue' activities, which currently shows 'No activities to show'.

<input type="checkbox"/>	☆ Manas Raghuwanshi	New Onboarding Task Assigned - <p><div style="font-family: Arial, sans-serif; line...	6:16 PM
<input type="checkbox"/>	☆ Manas Raghuwanshi 3	New Onboarding Task Assigned - <p><div style="font-family: Arial, sans-serif; line...	Sep 23

