

## Phase 4: Process Automation (Admin)

### Objective

The goal of this phase is to automate repetitive administrative processes in Salesforce using **Workflow Rules, Approval Processes, and Process Builder/Flows**. These automations ensure faster task execution, reduce manual errors, and enforce business rules effectively for the *Employee Onboarding & Training Tracker* project.

### Workflow Rule – Email Notification for Overdue Onboarding Tasks

- **Purpose:** Notify employees when an onboarding task is overdue and not completed.
- **Configuration Steps:**
  1. Create a Workflow Rule on the **Onboarding Task** object.
  2. Set criteria: Task Status  $\neq$  Completed AND Due Date < Today.
  3. Create an Email Template named **OT\_Overdue\_Reminder**.
  4. Configure an Email Alert to send this template to the related employee's email.
  5. Attach the Email Alert to the Workflow Rule and activate.

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Workflow Rules

Edit Rule OT\_Overdue\_Reminder

Step 3 of 3

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria

AND(  
NOT(ISPICKVAL(Task\_Status\_\_c, "Completed")),  
Due\_Date\_\_c < TODAY()  
)

Evaluation Criteria

Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria

Immediate Workflow Actions

Action	Type	Description
<a href="#">Edit</a>   <a href="#">Remove</a>	Email Alert	OT_Overdue_Reminder

Add Actions

Time-Dependent Workflow Actions [See an example](#)

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Email Alerts

Email Alert

OT\_Overdue\_Reminder

[Rules Using This Email Alert \(1\)](#) | [Approval Processes Using This Email Alert \(0\)](#) | [Entitlement Processes Using This Email Alert \(0\)](#)

Email Alert Detail

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Description	OT_Overdue_Reminder	Email Template	Rescheduled Service Appointment Confirmation Email
Unique Name	OT_Overdue_Reminder	Object	Onboarding Task
From Email Address	Current User's email address		
Recipients	Related User: Last Modified By		
Additional Emails			
Created By	Janaki.Chandragiri, 9/30/2025, 8:44 AM	Modified By	Janaki.Chandragiri, 9/30/2025, 8:44 AM

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

Rules Using This Email Alert [Rules Using This Email Alert Help](#)

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

## Approval Process – Approve Discount Requests

- **Purpose:** Ensure all high-value discount requests are reviewed and approved by managers.
- **Configuration Steps:**
  1. Create a custom field **Discount\_Amount\_\_c** on Opportunity (or use a custom Discount Request object).
  2. Create an Approval Process with entry criteria: **Discount\_Amount\_\_c > 5000**.
  3. Submission actions: Set **Approval\_Status\_\_c** = Pending, send approval email.
  4. Approval Step: Assign approver as Sales/HR Manager.
  5. Final Approval Action: Update status to Approved, notify requester.
  6. Final Rejection Action: Update status to Rejected, notify requester.
  7. Add **Submit for Approval** button to page layout.
  8. Activate process.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with categories: Process Automation (Workflow Actions, Email Alerts, Field Updates, Outbound Messages, Send Actions, Tasks), Workflow Rules (selected), User Interface, Console Settings (Workspace Page, Loading Preference), Translation Workbench, and Export. The main content area is titled 'Workflow Rules' and shows 'All Workflow Rules'. It includes a 'New Rule' button and a table of existing rules. The table has columns for Action, Rule Name, Description, Object, and Active. One rule is listed: 'OT\_Overdue\_Reminder' with the object 'Onboarding Task' and is marked as active.

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	OT_Overdue_Reminder		Onboarding Task	✓

## Create Flow Approval Process

Get started with drafting a flow approval process by providing some basic information.

\* Label

Discount\_Request\_\_c

\* API Name ⓘ

Discount\_Request\_\_c

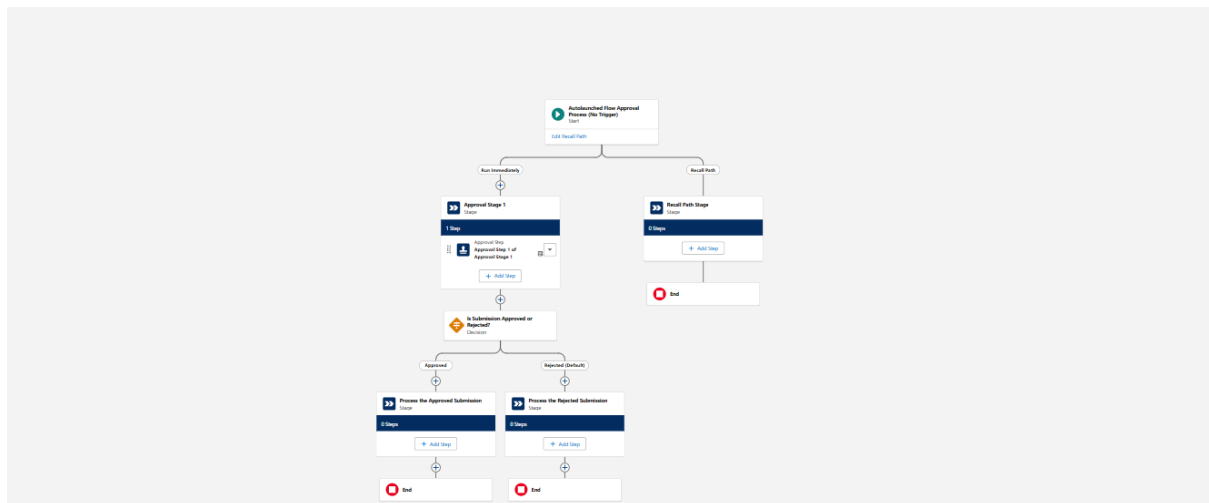
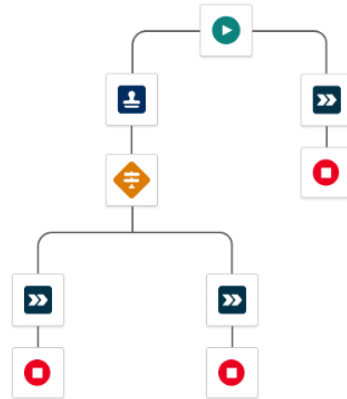
\* Number of approval levels

- ☒ 1 level  
☐ 2 levels  
☐ 3 levels

\* Add final actions ⓘ

- ☒ Yes  
☐ No

\* Add a recall path ⓘ



## Process Builder / Flow – Auto-Creation of Onboarding Tasks

- **Purpose:** Automatically assign onboarding tasks whenever a new employee is created.
- **Configuration Steps:**
  1. In **Process Builder**, create a new process on the Employee object.
  2. Trigger: when a record is created.

3. Immediate Action → Create Records → Onboarding Task.
  - Example: Task = “Complete HR Forms”, Status = Not Started, Related Employee = New Employee.
4. Add additional tasks like “Attend Orientation”.
5. Save and activate the process.

#### **Outcome of Phase 4**

- Workflow Rules ensure timely notifications and reduce missed deadlines.
- Approval Processes enforce compliance and managerial control over sensitive requests.
- Process Builder automates task assignments, ensuring every new employee has predefined onboarding tasks without manual intervention.

Together, these automations improve efficiency, standardize operations, and enhance the onboarding & training process.