**📌 Full Scope of the "Employee Onboarding App"**

The **Employee Onboarding App** is designed to help HR teams manage the onboarding process of new employees efficiently. It automates tasks like sending welcome emails, assigning training, tracking documents, and setting up system access.

**🚀 What a Salesforce Admin Would Do in a Real-World Company?**

As a **Salesforce Admin**, your job would be to: ✅ **Configure Salesforce to track employee records** (custom objects, fields, relationships).  
✅ **Automate the onboarding process** (Flows & Process Builder).  
✅ **Set up security & permissions** (HR vs. IT vs. Employees).  
✅ **Create reports & dashboards** (HR reports on onboarding progress).  
✅ **Deploy & maintain the app** (keep it updated & troubleshoot issues).

This project will give you **hands-on experience** in all these areas, just like a real **Salesforce Admin job**. 🚀

**📌 Key Features of the Employee Onboarding App**

**1️⃣ Employee Record Management**

* **Track new employees**: Name, Role, Start Date, Department.
* **Store HR Documents**: ID Proofs, Offer Letter.
* **Monitor onboarding progress**.

**2️⃣ Automation of Onboarding Tasks**

* **Send welcome emails automatically** when an employee joins.
* **Assign IT & HR tasks** (e.g., laptop setup, compliance training).
* **Notify managers about pending tasks**.

**3️⃣ User Management & Security**

* **HR Team should manage employee records**.
* **IT Team should handle system access**.
* **New Employees should see only their own details**.

**4️⃣ Reports & Dashboards**

* **HR Reports**: Onboarding Status, Pending Tasks.
* **IT Reports**: Accounts & Systems Assigned.
* **Manager Dashboards**: Employee Training Progress.

**🔹 How We Will Build It (Step-by-Step Plan)**

**✅ Phase 1: Set Up Custom Objects & Fields**

1. **Create "Employee" Object** → Store all new hire details.
2. **Create "Onboarding Task" Object** → Track each task assigned (IT setup, HR docs).
3. **Define Relationships** → Link Employees with Tasks.

**✅ Phase 2: User Roles, Profiles & Security**

1. **HR Role → Full access to Employee data**.
2. **IT Role → Can assign systems but no HR access**.
3. **Employee Role → Can only view their own onboarding details**.

**✅ Phase 3: Automate with Flows & Process Builder**

1. **Flow: Send Welcome Email** when an employee joins.
2. **Process Builder: Assign IT Setup Task** automatically.
3. **Reminder Emails** for pending tasks.

**✅ Phase 4: Reports & Dashboards**

1. **HR Dashboard** → New hires & pending tasks.
2. **IT Dashboard** → Assigned systems per employee.
3. **Employee Progress Report**.

**✅ Phase 5: Deployment & Testing**

* **Test each role** by logging in as different users.
* **Fix security issues** before making it live.

**📌 Phase 1: Setting Up Core Objects**

We will create **two custom objects**:

1. **Employee** (To store employee details)
2. **Onboarding Task** (To track employee onboarding process)

**✅ Step 1: Create the Employee Object**

📌 This object will store information about employees being onboarded.

**🛠 Actions to Perform:**

1. **Go to Setup** → Click on **Object Manager**.
2. Click on **Create** → **Custom Object**.
3. **Enter the following details:**
   * **Label:** Employee
   * **Plural Label:** Employees
   * **Object Name:** Employee
   * **Record Name:** Employee Name
   * **Data Type:** Text
4. **Check the following settings:**
   * ✅ Allow Reports
   * ✅ Track Field History
   * ✅ Allow Search
   * ✅ Add Notes & Attachments (Optional)
5. Click **Save**.

**📌 Step 2: Add Custom Fields to the Employee Object**

📌 Now, we add fields to store employee information.

**🔹 Fields to Create:**

| **Field Label** | **Data Type** | **Description** |
| --- | --- | --- |
| **Employee Name** | *Auto-created* | Already there as the Record Name |
| **Email** | *Email* | Employee’s official email |
| **Role** | *Picklist* | Employee Role (Options: HR, IT, Finance, Manager, Sales) |
| **Department** | *Picklist* | Department Name (Options: HR, IT, Finance, Sales, Admin) |
| **Joining Date** | *Date* | The employee’s joining date |

**🛠 Actions to Perform:**

1. **For each field,** go to the **Employee object** → **Fields & Relationships** → **New**.
2. Select the **correct data type** (Email, Picklist, Date).
3. Enter **Field Label** (as shown above).
4. Click **Next** → Make it **Visible for All Profiles** → **Save**.

**✅ Step 3: Create the Onboarding Task Object**

📌 This object will track onboarding steps assigned to employees.

**🛠 Actions to Perform:**

1. **Go to Setup** → Click on **Object Manager**.
2. Click on **Create** → **Custom Object**.
3. **Enter the following details:**
   * **Label:** Onboarding Task
   * **Plural Label:** Onboarding Tasks
   * **Object Name:** Onboarding\_Task
   * **Record Name:** Task Name
   * **Data Type:** Text
4. **Check the following settings:**
   * ✅ Allow Reports
   * ✅ Track Field History
   * ✅ Allow Search
   * ✅ Add Notes & Attachments (Optional)
5. Click **Save**.

**📌 Step 4: Add Custom Fields to the Onboarding Task Object**

📌 Now, we add fields to track onboarding tasks.

**🔹 Fields to Create:**

| **Field Label** | **Data Type** | **Description** |
| --- | --- | --- |
| **Task Name** | *Auto-created* | Already there as the Record Name |
| **Assigned Employee** | *Lookup (Employee)* | Assign the task to an employee |
| **Task Description** | *Text Area (Long)* | Details about the onboarding task |
| **Due Date** | *Date* | Deadline for completing the task |
| **Task Status** | *Picklist* | Status of the task (Pending, In Progress, Completed) |

**🛠 Actions to Perform:**

1. **For each field,** go to the **Onboarding Task object** → **Fields & Relationships** → **New**.
2. Select the **correct data type** (Lookup, Picklist, Date, Text Area).
3. Enter **Field Label** (as shown above).
4. Click **Next** → Make it **Visible for All Profiles** → **Save**.

**📌 Step 5: Add These Objects to the App Navigation**

Now that we have created the **Employee** and **Onboarding Task** objects, we can **add them to the Employee Onboarding App**.

1. **Go to App Manager** → Find **Employee Onboarding App**.
2. Click **Edit** → Go to **Navigation Items**.
3. **Search & Add the following:** ✅ **Employee**  
   ✅ **Onboarding Tasks**  
   ✅ **Reports**  
   ✅ **Dashboards**
4. Click **Next** → **Save & Finish**.

**✅ Summary of What We Did**

✅ Created **Employee** Object with required fields.  
✅ Created **Onboarding Task** Object with required fields.  
✅ Connected **Onboarding Task** to **Employee** via Lookup.  
✅ Added all required objects to the **Employee Onboarding App**.

🚀 **Now, you have a working structure for the Employee Onboarding App!** 🎉

**🔹 Step 1: Add a New "Create Records" Element**

1. Click the **(+) icon** below "Run Immediately."
2. Select **"Create Records."**
3. In the **Label**, enter:  
   ➝ **"Create Onboarding Task"**
4. In the **API Name**, enter:  
   ➝ **"Create\_Onboarding\_Task"**
5. **Description** (optional):  
   ➝ *"Once an employee is created, automatically create an onboarding task."*
6. Click **Done**.

**🔹 Step 2: Configure "Create Records" for Onboarding Task**

1. Under **"How to Set Record Field Values"**, select:  
   ➝ **"Manually"** (✅)
2. Under **"Create a Record of This Object"**, select:  
   ➝ **Onboarding Task**
3. Now, add the following fields and values:

**🔹 Step 3: Set Field Values for Onboarding Task**

| **Field Name** | **Value to Assign** |
| --- | --- |
| **Onboarding Task Name** | "Welcome Kit & System Setup" (or any default task name) |
| **Employee** | 🔍 Search & Select → **Triggering Employee\_\_c > Record ID** |
| **Task Description** | "Prepare system, documents, and credentials for the new hire." |
| **Due Date** | 🔍 Search & Select → **Running Flow Interview > CurrentDate** |
| **Task Status** | "Pending" |
| **Priority** | "High" |

➡️ **How to Add Each Field:**

* Click **"Add Field"**, search for the field, and select it.
* For values, either **type text** or **use the 🔍 magnifying glass** to select.

**🔹 Step 4: Save and Activate the Flow**

1. Click **Save** (top-right).
2. Click **Activate**.
3. ✅ **Test the Flow**:  
   ➝ Go to the **Employee Object** and create a new employee record.  
   ➝ Check if an **Onboarding Task** is automatically created.