PHASE -4

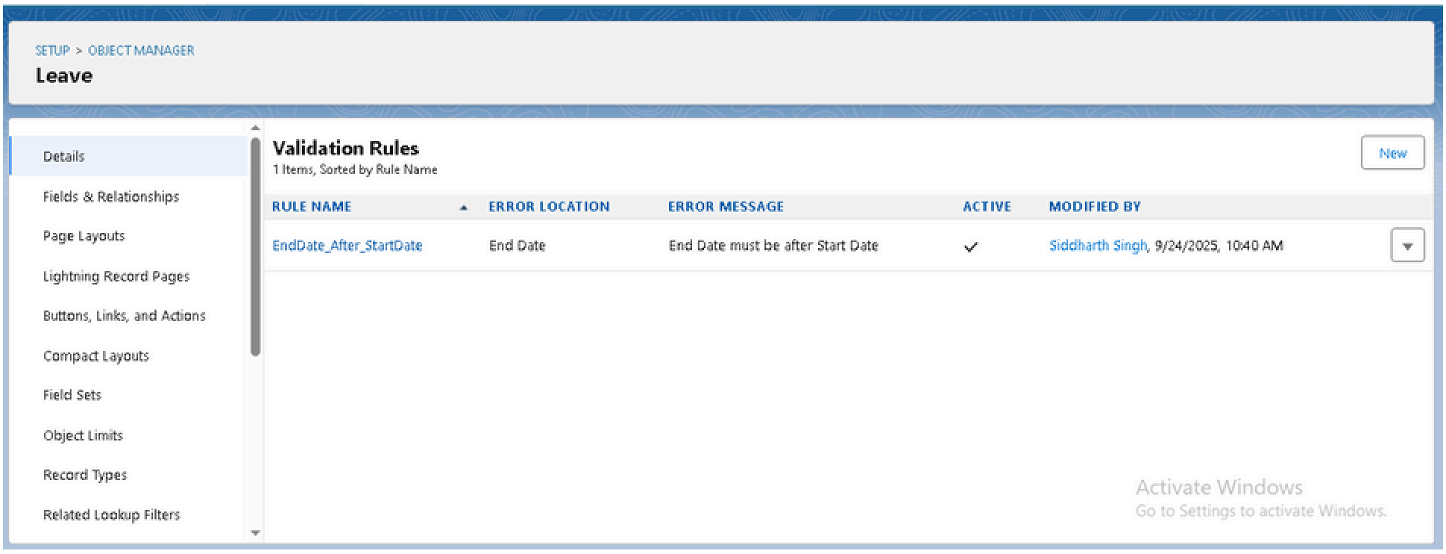
Project: AI-Powered HR & Employee Management Bot

1. Validation Rules

Purpose: Prevent bad data at save.

Steps (Leave example: End Date must be ≥ Start Date):

1. Setup → Object Manager → **Leave__c** → **Validation Rules** → **New**.
2. Enter:
    - Rule Name: EndDate_after_or_eq_StartDate
    - Error Condition Formula:
    - End_Date__c < Start_Date__c
    - Error Message: End Date must be same or after Start Date.
    - Error Location: Field → **End Date**
3. Save → **Activate**.



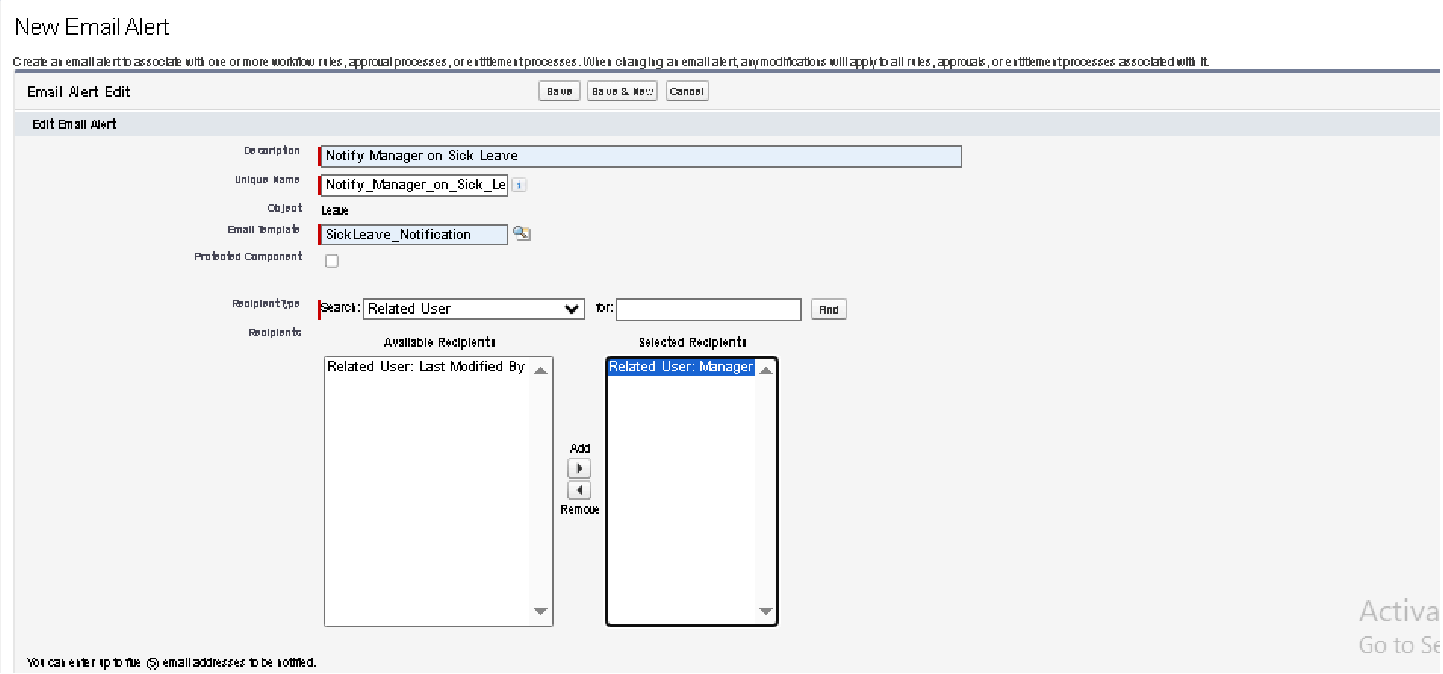
2. Workflow Rules (legacy, UI-based)

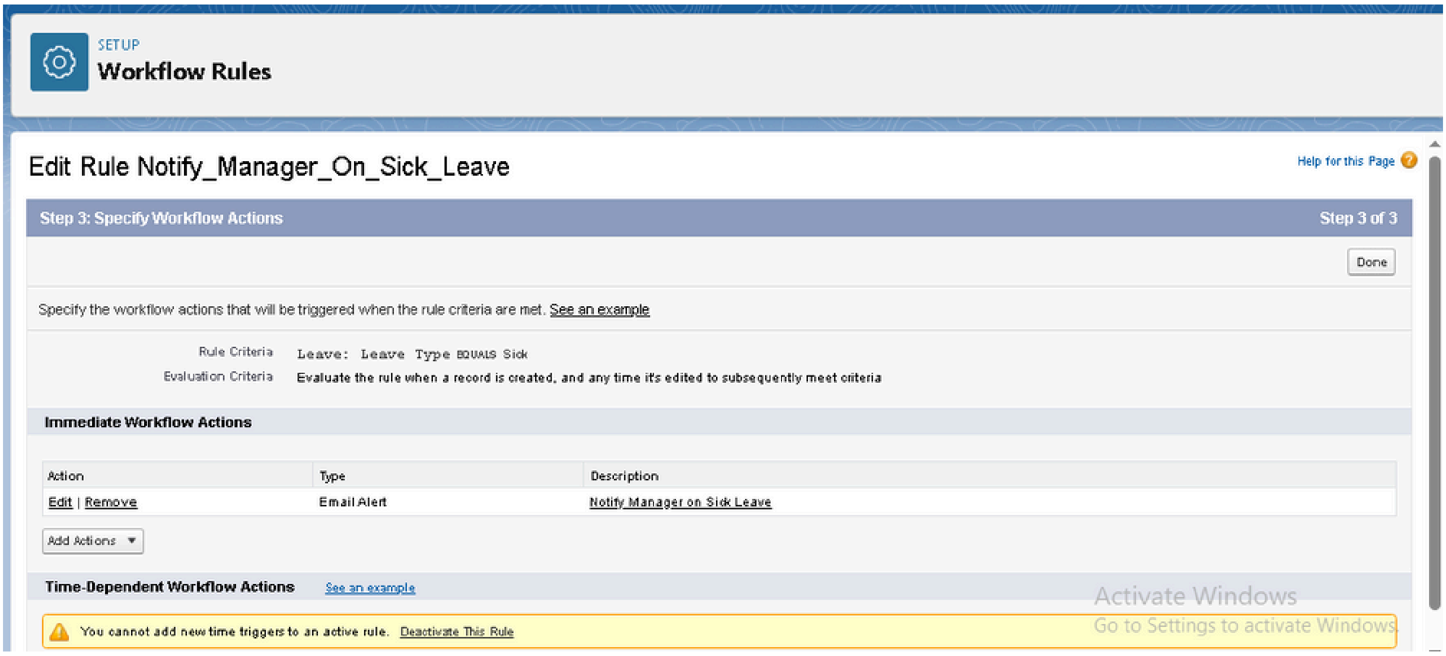
Purpose: Simple triggers for email, field updates, tasks, outbound messages.

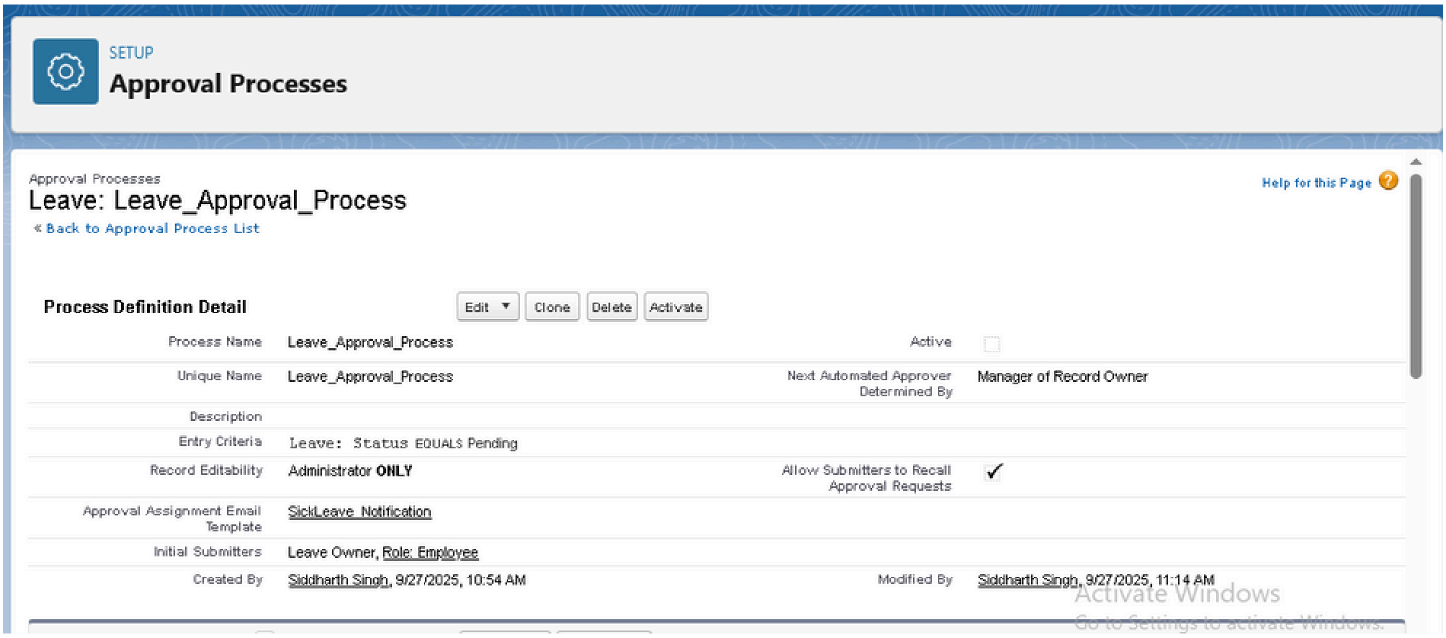
Steps (notify manager on new Sick leave):

1. Setup → **Workflow Rules** → **New Rule**.
2. Select Object: **Leave__c** → Next.
3. Name: Notify_Manager_On_Sick_Leave. Evaluation Criteria: **created** (or created, and every time it's edited).

4. Rule Criteria: Leave_Type__c = 'Sick' (use formula or field criteria). Save & Next.
5. Add Workflow Actions → **New Email Alert** or **New Task** or **New Field Update**.
   - For Email Alert: create Email Template first, then add recipients (Manager lookup via field).
6. Save → **Activate**.







3. Flow Builder — types & steps

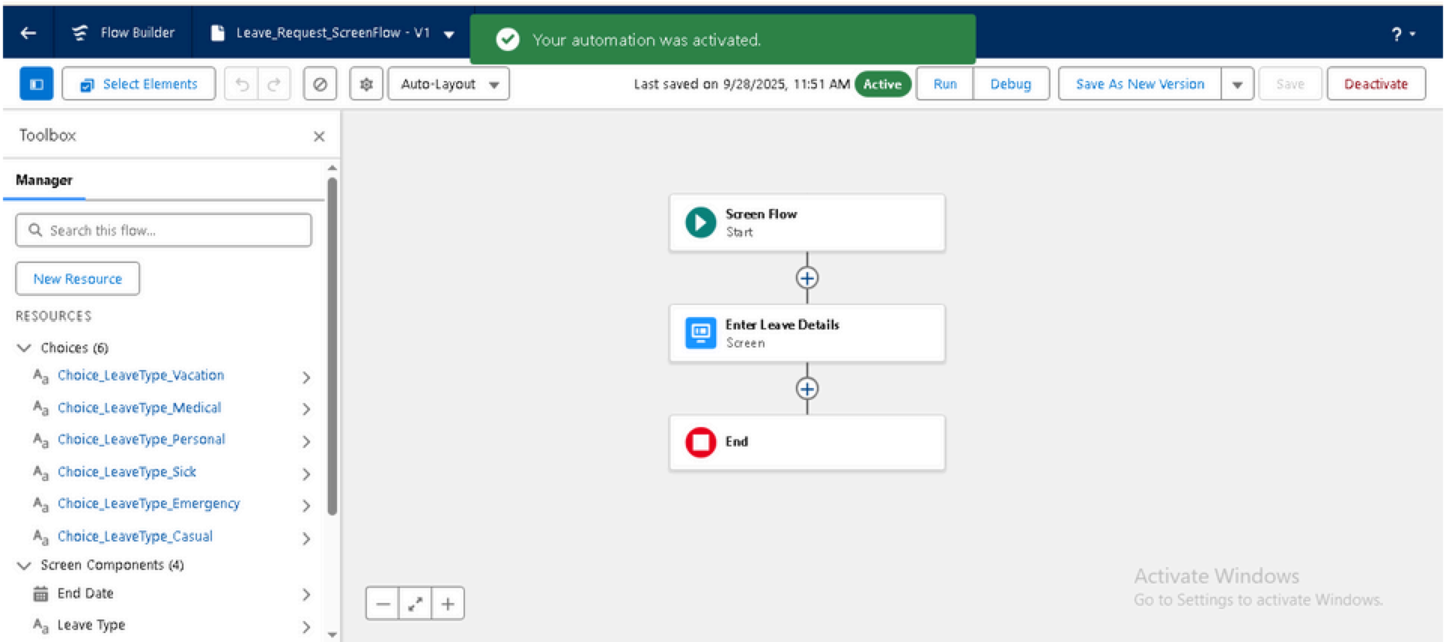
General: Setup → **Flows** → **New** → choose flow type. Build with elements, Save, **Activate**. Use Debug to test.

Screen Flow (user interactive)

Use: multi-step forms, guided processes.

Steps (create quick leave request screen):

1. Setup → Flows → New → **Screen Flow** → Create.
2. Drag **Screen** element → add components (Text for reason, Date for start/end, Picklist for leave type).
3. After Screen, add **Create Records** element → create a Leave__c record using screen inputs.
4. Save → **Activate**.
5. Expose: Add Flow to a Lightning Page or create a Quick Action (Setup → Object Manager → Leave__c → Buttons, Links, Actions → New Action → Action Type: Flow).

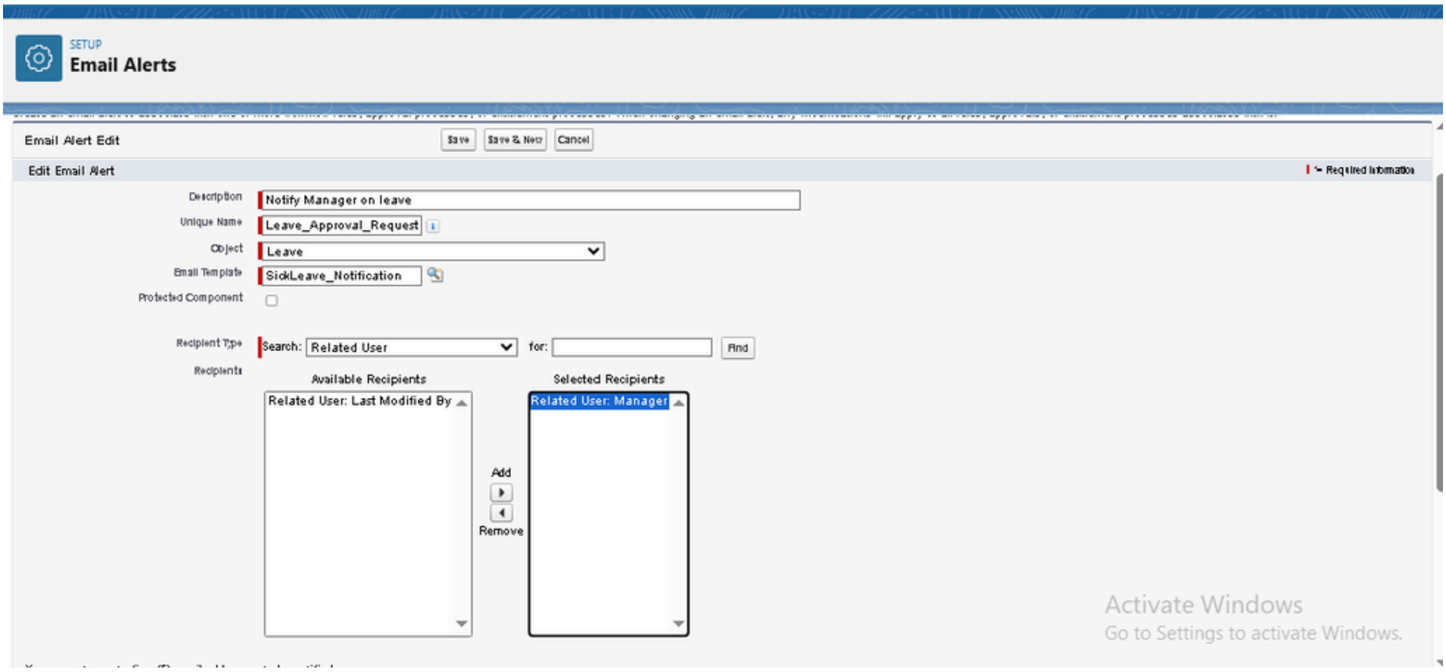


4. Email Alerts

Purpose: Send email using a template.

Steps:

1. Setup → **Email Alerts** → **New Email Alert**.
2. Fill: Label (Leave_Approval_Requested), Unique Name.
3. Object: **Leave__c**. Email Template: choose template.
4. Recipients: Related User (e.g., Leave.Employee__r.Manager__c) or Users, Roles.
5. Save.
6. Use: Hook Email Alert into Workflow Rule, Process Builder action, or Flow (Action: Send Email Alert).



5. Field Updates

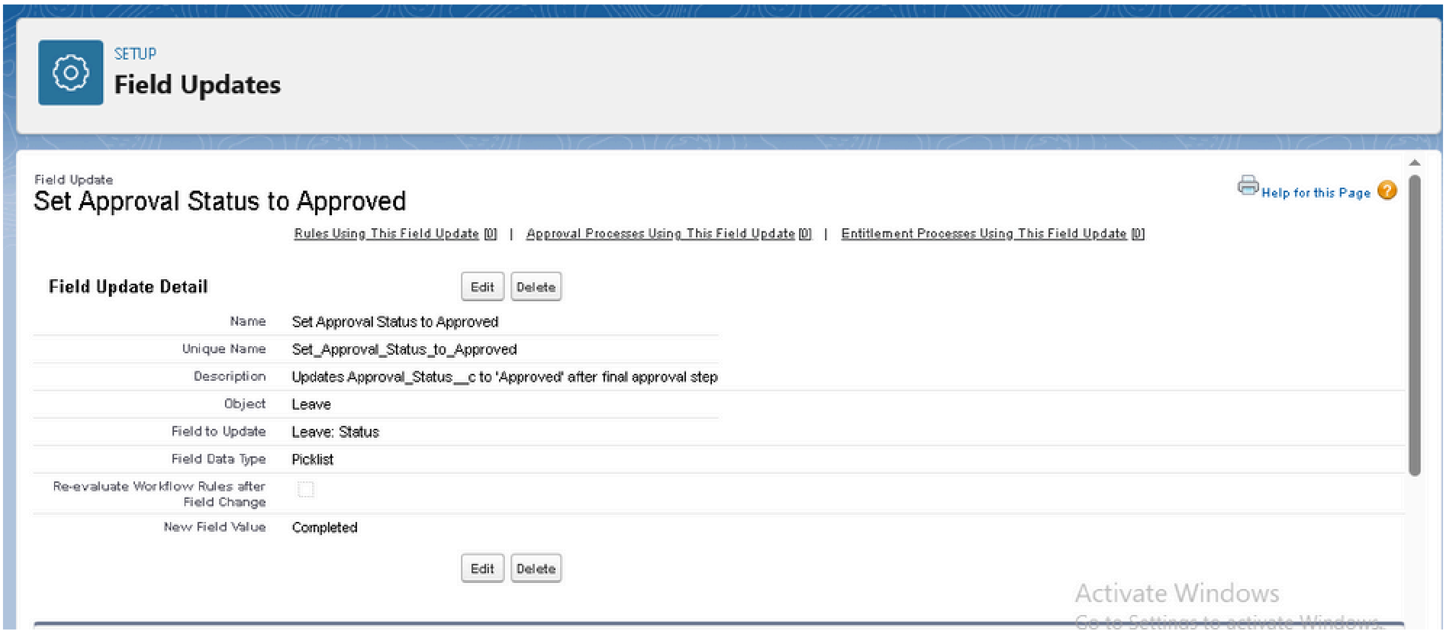
Purpose: Modify field values automatically.

Two ways:

- **Workflow Field Update** (legacy): Setup → Workflow Actions → Field Updates → New → choose object/field and set new value.
- **Flow Update Records** (recommended): In Flow, use **Update Records** element to set field values (supports complex logic and multiple records).

Example: on approval, set Approval_Status__c = 'Approved':

- In Approval Process: add Final Approval Action → Field Update → set field.
- Or in Flow after approval: Update Records element.



6. Tasks (create tasks for users)

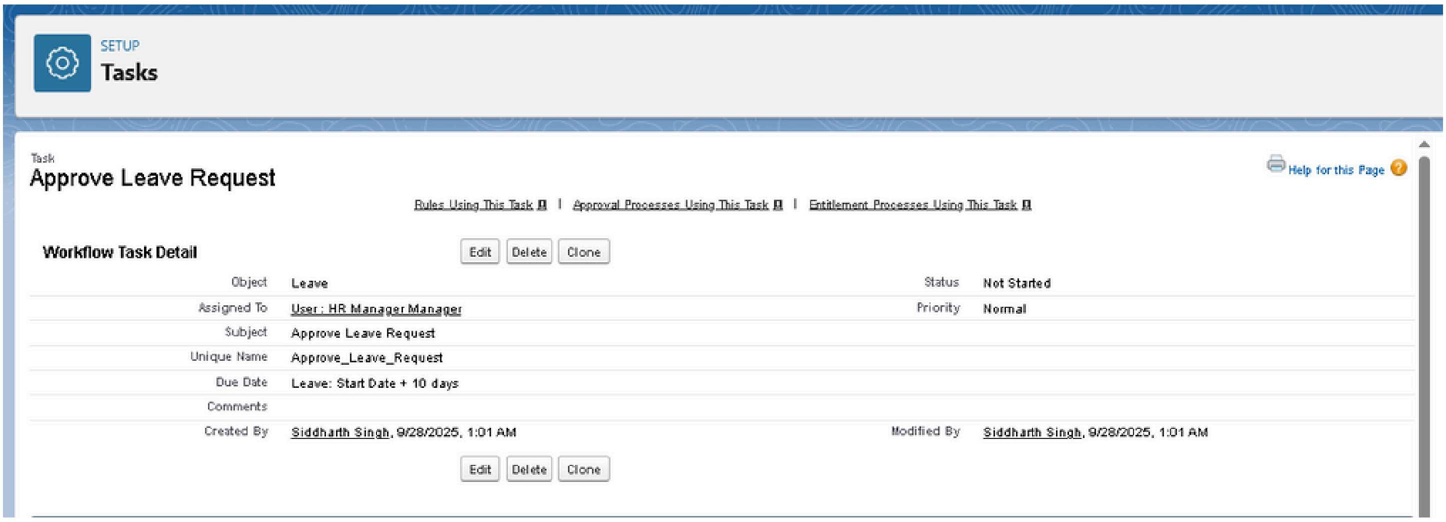
Purpose: Assign follow-up work.

Two ways:

- **Workflow Task**: Setup → Workflow Actions → Tasks → New.
- **Flow Create Records**: Create Task record with fields: Subject, WhoId/WhatId, OwnerId, DueDate.

Example: When leave is submitted, create Task assigned to manager:

- Flow: Create Records → Task with OwnerId = Leave.Employee__r.Manager__c.

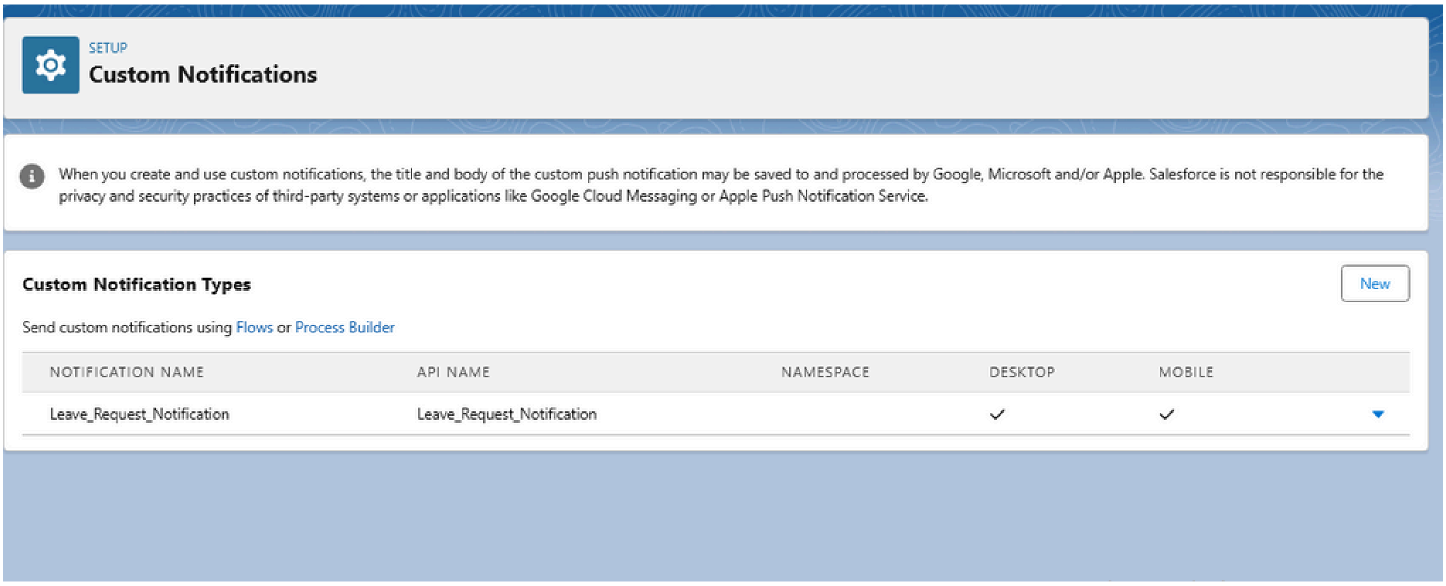


7. Custom Notifications

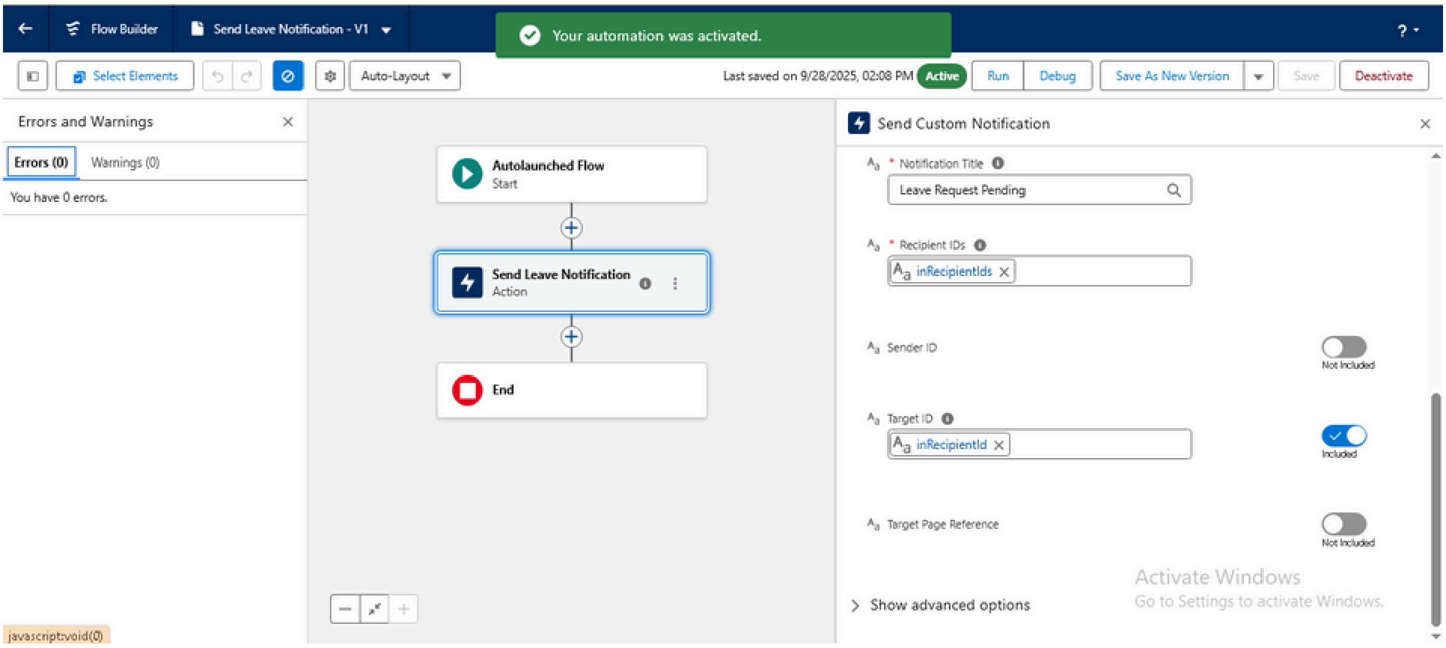
Purpose: In-app and mobile notifications to users.

Steps:

1. Setup → **Notification Builder** → **Custom Notifications** → **New**.
   - Label: Leave_Request_Notification → Channels: Desktop, Mobile (choose as needed). Save.



1. Use in Flow: In Flow Builder add **Action** → search **Send Custom Notification** (standard action).
   - Configure Notification Type (pick what you created), Recipient IDs (User Id(s)), Title, Body, Target ID (record).
2. Save → Activate.
3. Test: Run flow / debug; recipient sees notification in Salesforce bell & mobile app.


Flow Builder
Send Leave Notification - V1
Your automation was activated.
Select Elements
Auto-Layout
Last saved on 9/28/2025, 02:08 PM
Active
Run
Debug
Save As New Version
Save
Deactivate
Errors and Warnings
Errors (0)
Warnings (0)
You have 0 errors.
Autolaunched Flow
Start
Send Leave Notification
Action
End
Send Custom Notification
* Notification Title
Leave Request Pending
* Recipient IDs
inRecipientIds
Sender ID
Not Included
Target ID
inRecipientId
Included
Target Page Reference
Not Included
Show advanced options
Activate Windows
Go to Settings to activate Windows.
javascript:void(0)