

PHASE -4

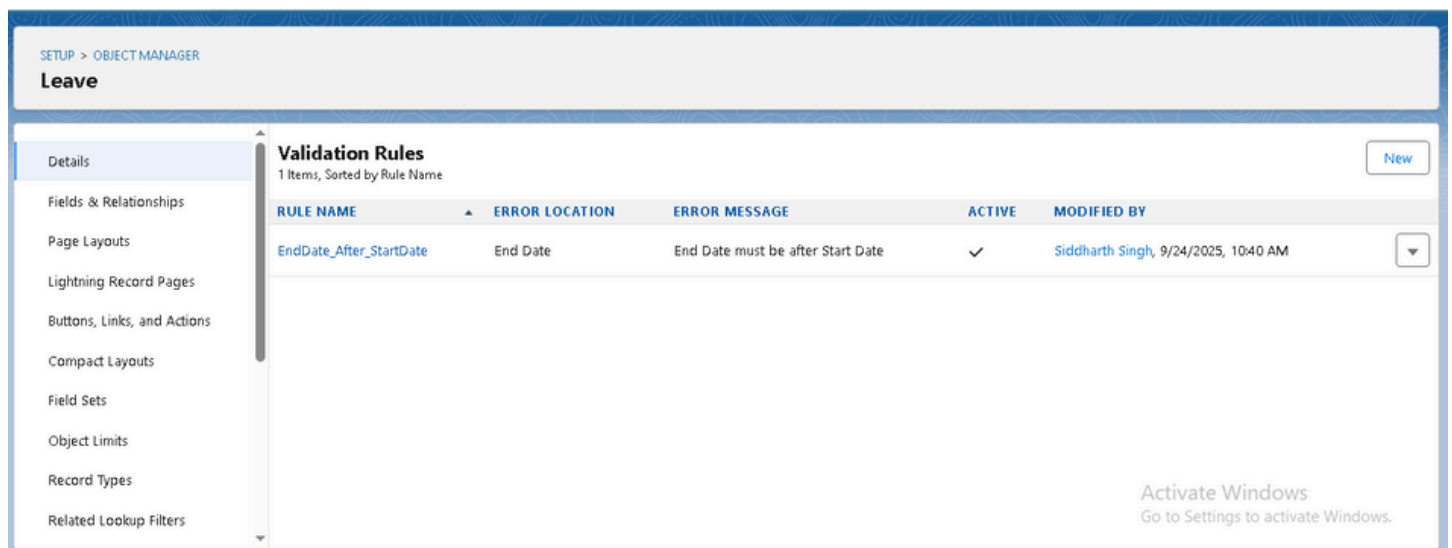
Project: AI-Powered HR & Employee Management Bot

1. Validation Rules

Purpose: Prevent bad data at save.

Steps (Leave example: End Date must be \geq 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**.

New Email Alert

Create an email alert to associate with one or more workflow rules, approval processes, or entitlement processes. When changing an email alert, any modifications will apply to all rules, approvals, or entitlement processes associated with it.

Email Alert Edit

Save

Save & Next

Cancel

Edit Email Alert

Description

Notify Manager on Sick Leave

Unique Name

Notify_Manager_on_Sick_Le

Object

Leave

Email Template

SickLeave_Notification

Protected Component

☐

Recipient Type

Search: Related User

for:

Find

Recipients

Available Recipients

Related User: Last Modified By

Selected Recipients

Related User: Manager

Add

Remove

You can enter up to five email addresses to be notified.

SETUP

Workflow Rules

Edit Rule Notify_Manager_On_Sick_Leave

Help for this Page

Step 3: Specify Workflow Actions

Step 3 of 3

Done

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

Rule Criteria

Leave: Leave Type equals Sick

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
Edit Remove	Email Alert	Notify Manager on Sick Leave

Add Actions


Time-Dependent Workflow Actions

[See an example](#)

You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

Activate Windows

Go to Settings to activate Windows



SETUP

Approval Processes

Approval Processes

Leave: Leave_Approval_Process

[Back to Approval Process List](#)

Help for this Page

Process Definition Detail

Edit

Clone

Delete

Activate

Process Name	Leave_Approval_Process	Active	<input type="checkbox"/>
Unique Name	Leave_Approval_Process	Next Automated Approver Determined By	Manager of Record Owner
Description			
Entry Criteria	Leave: Status EQUALS Pending		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	SickLeave_Notification		
Initial Submitters	Leave Owner, Role: Employee		
Created By	Siddharth Singh , 9/27/2025, 10:54 AM	Modified By	Siddharth Singh , 9/27/2025, 11:14 AM

3. Flow Builder – types & steps

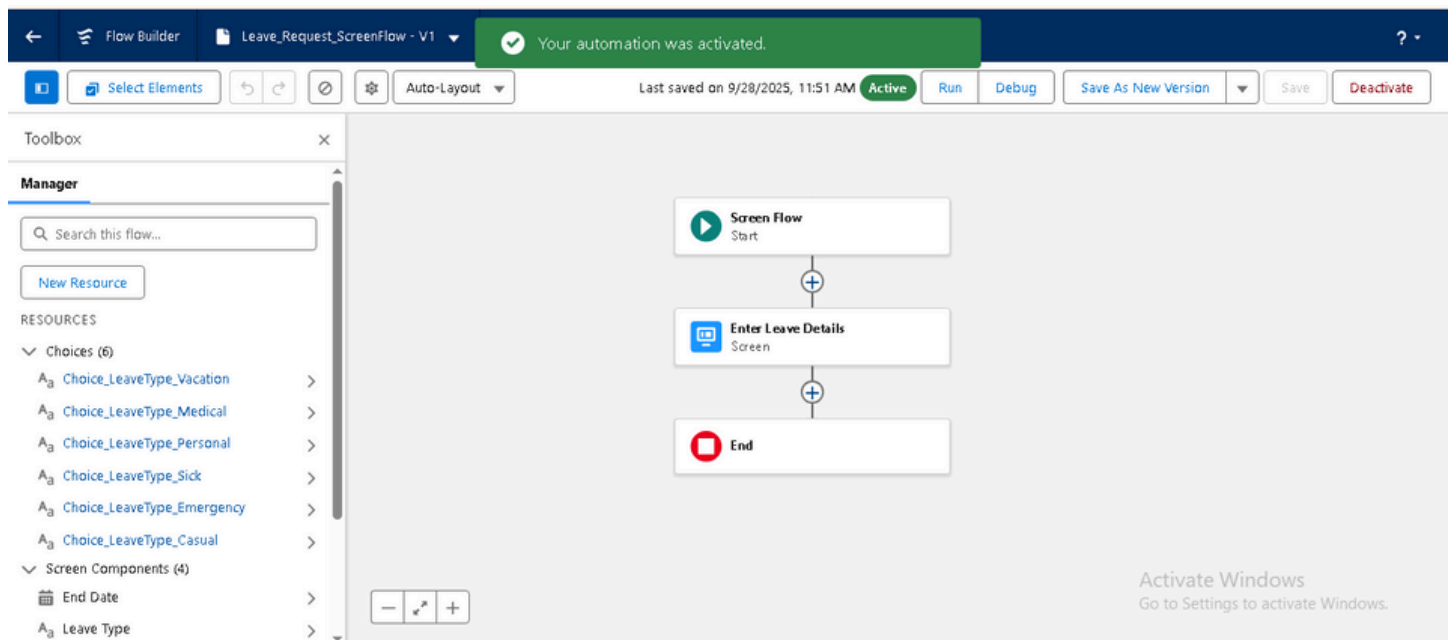
General: Setup → **Flows** → **New** → choose flow type. Build with elements, Save, **Activate**. Use Debug to test.

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.

The screenshot shows the 'Field Updates' setup page in Salesforce. The page title is 'Field Updates' with a 'SETUP' icon. Below the title, there's a section for 'Field Update' titled 'Set Approval Status to Approved'. There are three tabs: 'Rules Using This Field Update', 'Approval Processes Using This Field Update', and 'Entitlement Processes Using This Field Update'. The 'Field Update Detail' section includes fields for Name, Unique Name, Description, Object, Field to Update, Field Data Type, Re-evaluate Workflow Rules after Field Change, and New Field Value. The 'Name' field is 'Set Approval Status to Approved', 'Unique Name' is 'Set_Approval_Status_to_Approved', 'Description' is 'Updates Approval_Status__c to 'Approved' after final approval step', 'Object' is 'Leave', 'Field to Update' is 'Leave: Status', 'Field Data Type' is 'Picklist', 'Re-evaluate Workflow Rules after Field Change' is unchecked, and 'New Field Value' is 'Completed'. There are 'Edit' and 'Delete' buttons for the field update detail. At the bottom right, there's an 'Activate Windows' watermark.

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.



SETUP

Tasks

Task

Approve Leave Request

[Rules Using This Task](#) | [Approval Processes Using This Task](#) | [Entitlement Processes Using This Task](#)

Help for this Page

Workflow Task Detail

Edit

Delete

Clone

Object	Leave	Status	Not Started
Assigned To	User: HR Manager Manager	Priority	Normal
Subject	Approve Leave Request		
Unique Name	Approve_Leave_Request		
Due Date	Leave: Start Date + 10 days		
Comments			
Created By	Siddharth Singh, 9/28/2025, 1:01 AM	Modified By	Siddharth Singh, 9/28/2025, 1:01 AM

Edit

Delete


Clone

7. Custom Notifications

Purpose: In-app and mobile notifications to users.

Steps:

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



SETUP

Custom Notifications

When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.

Custom Notification Types

New

Send custom notifications using [Flows](#) or [Process Builder](#)

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
Leave_Request_Notification	Leave_Request_Notification		✓	✓

- 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).
- Save → Activate.
- 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

×

A₃ Notification Title ⓘ

Leave Request Pending

🔍

A₃ Recipient IDs ⓘ

A₃ inRecipientIds ✕

A₃ Sender ID

⏻

Not Included

A₃ Target ID ⓘ

A₃ inRecipientId ✕

✓

Included

A₃ Target Page Reference

⏻

Not Included

> Show advanced options

Activate Windows

Go to Settings to activate Windows.

javascriptvoid(0)