

PHASE -4

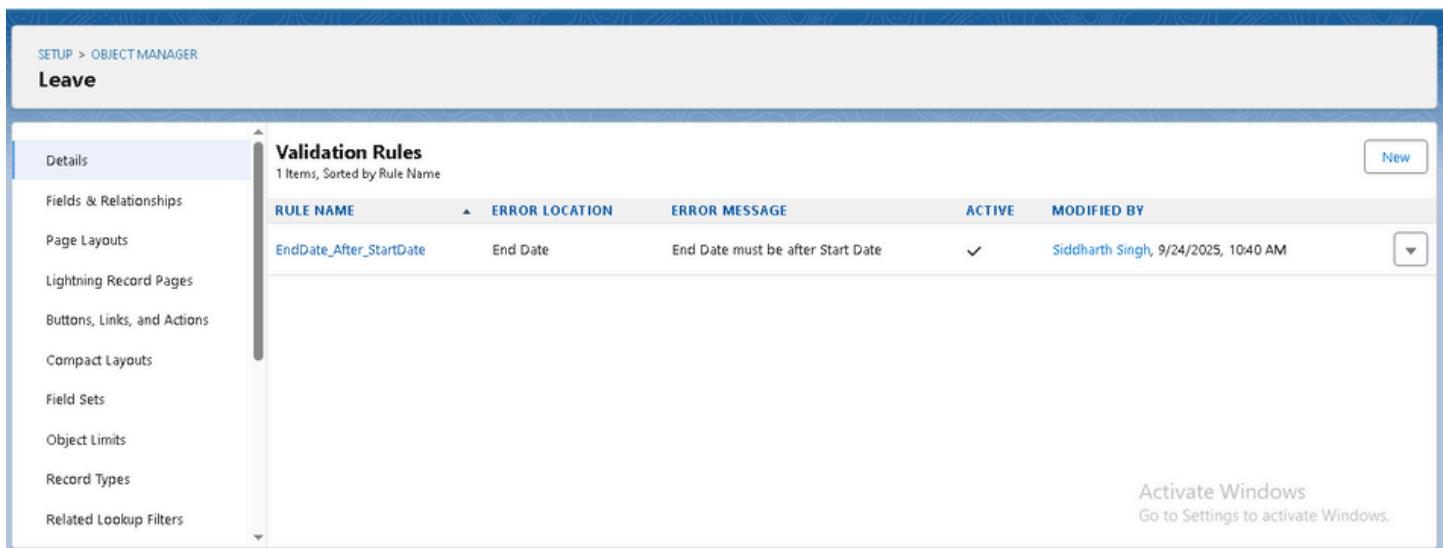
Project: AI-Powered HR & Employee Management Bot

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**.



The screenshot shows the Salesforce Object Manager interface for the 'Leave' object. On the left, there's a sidebar with various tabs like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Validation Rules' and shows one item: 'EndDate_After_StartDate'. The table has columns for RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The rule is active and was modified by Siddharth Singh on 9/24/2025, 10:40 AM. At the bottom right of the main area, there are buttons for 'Activate Windows' and 'Go to Settings to activate Windows.'

Validation Rules				
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
EndDate_After_StartDate	End Date	End Date must be after Start Date	✓	Siddharth Singh, 9/24/2025, 10:40 AM

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

Edit Email Alert

Description	Notify Manager on Sick Leave								
Unique Name	Notify_Manager_on_Sick_Le								
Object	Leave								
Email Template	SickLeave_Notification								
Protected Component	<input type="checkbox"/>								
Recipient Type	Search: Related User								
Recipients	<table border="1"> <tr> <th>Available Recipients</th> <th>Selected Recipients</th> </tr> <tr> <td>Related User: Last Modified By</td> <td>Related User: Manager</td> </tr> <tr> <td>Add</td> <td></td> </tr> <tr> <td>Remove</td> <td></td> </tr> </table>	Available Recipients	Selected Recipients	Related User: Last Modified By	Related User: Manager	Add		Remove	
Available Recipients	Selected Recipients								
Related User: Last Modified By	Related User: Manager								
Add									
Remove									

You can enter up to 100 email addresses to be notified.

Activation
Go to Settings

SETUP **Workflow Rules**

Edit Rule Notify_Manager_On_Sick_Leave

Step 3: Specify Workflow Actions Step 3 of 3

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](#)

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

Go to Settings to activate Windows



SETUP

Approval Processes

Approval Processes
Leave: Leave_Approval_Process
[Help for this Page](#)

[« Back to Approval Process List](#)

Process Definition Detail		Actions	
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

Activate Windows
Go to Settings to activate Windows.

3. Flow Builder – types & steps

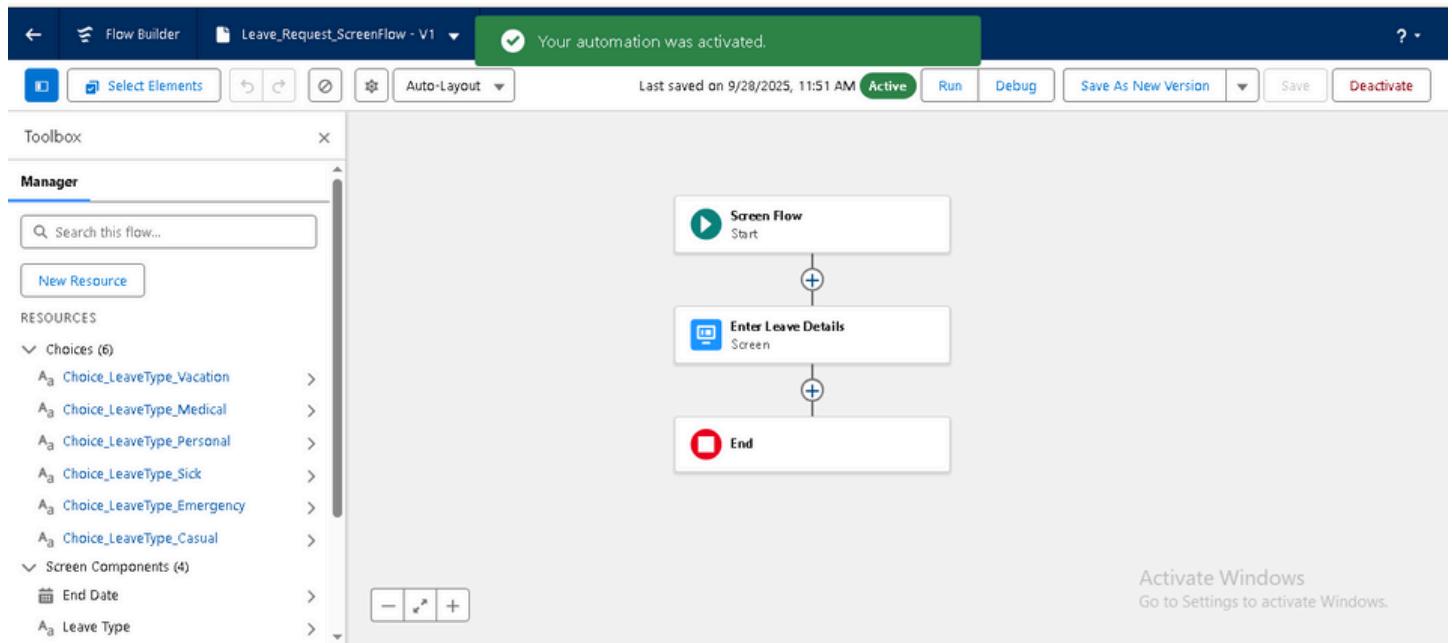
General: Setup → **Flows** → **New** → choose flow type. Build with elements, Save, **Activate**. Use Debug to test.

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).

SETUP Email Alerts

Email Alert Edit Save Save & Next Cancel

Description: Notify Manager on leave

Unique Name: Leave_Approval_Request

Object: Leave

Email Template: SickLeave_Notification

Protected Component:

Recipient Type: Search: Related User for: Find

Available Recipients: Related User: Last Modified By

Selected Recipients: Related User: Manager

Add Remove

Activate Windows
Go to Settings to activate Windows.

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' section in the Salesforce setup. A single rule is listed:

Field Update Detail	
Name	Set Approval Status to Approved
Unique Name	Set_Approval_Status_to_Approved
Description	Updates Approval_Status_c to 'Approved' after final approval step
Object	Leave
Field to Update	Leave: Status
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>
New Field Value	Completed

Buttons at the bottom: Edit, Delete, Help for this Page, and a Windows activation message.

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, Whold/WhatId, OwnerId, DueDate.

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

- Flow: Create Records → Task with OwnerId = Leave.Employee_r.Manager_c.

The screenshot shows the Salesforce Setup interface under the 'Tasks' section. A specific task named 'Approve Leave Request' is selected. The task details include:

- Workflow Task Detail:**
 - Object: Leave
 - Assigned To: User : HR Manager Manager
 - 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
 - Status: Not Started
 - Priority: Normal
 - Modified By: Siddharth Singh, 9/28/2025, 1:01 AM
- Buttons:** Edit, Delete, Clone.

7. Custom Notifications

Purpose: In-app and mobile notifications to users.

Steps:

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

The screenshot shows the Salesforce Setup interface under the 'Custom Notifications' section. It displays a table of custom notification types:

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
Leave_Request_Notification	Leave_Request_Notification		✓	✓

1. Use in Flow: In Flow Builder add **Action** → search **Send Custom Notification** (standard action).
 - o 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.

Your automation was activated.

Last saved on 9/28/2025, 02:08 PM **Active** Run Debug Save As New Version Save Deactivate

Errors and Warnings X

Errors (0) Warnings (0)

You have 0 errors.

Autolaunched Flow Start

Send Leave Notification Action

End

Send Custom Notification

Notification Title

Recipient IDs

Sender ID Not Included

Target ID

Target Page Reference Included

Show advanced options

Activate Windows
Go to Settings to activate Windows.

javascript:void(0)

The screenshot shows a Flow Builder interface with a green header bar indicating 'Your automation was activated.' The main workspace displays an 'Autolaunched Flow' starting with a 'Send Leave Notification' action, which then leads to an 'End' node. To the right, a configuration panel for the 'Send Custom Notification' action is open, showing fields for 'Notification Title' (set to 'Leave Request Pending'), 'Recipient IDs' (set to 'A_a inRecipientIds'), 'Sender ID' (unchecked), 'Target ID' (set to 'A_a inRecipientId' and checked), and 'Target Page Reference' (unchecked). A note at the bottom right says 'Activate Windows' with a link to 'Settings'. A code snippet 'javascript:void(0)' is visible at the bottom left.