

Onboarding automation setup

Run the sample and map its actions to your own onboarding systems.

Runnable local integration example

Approval, exception and retry tests

A setup worksheet and completed first-job example

A free worksheet from ailevrg.com/guides/client-onboarding-automation

Download and unzip the example. It needs Node.js 22 or later, has no dependencies and performs no external writes.

01 Trigger and inputs

Approved event and evidence

Trusted client and account identity

First deliverable and client approver

Access and scope confirmation

02 Actions

Systems and fields to update

Private folder or workspace rule

First task and owner

Draft and outgoing-message approval

03 Exceptions and retries

Missing-input and unusual-scope route

Persistent event and action keys

Safe retry rule for each external action

Audit and support owner

04 Test

Normal and held request

Repeated event and partial failure

Cross-client and concurrent-event checks

Acceptance decision before live connection

The sample first content job

Invented teaching example. No client outcome is claimed.

Confirmed inputs

Client A, an approved agreement, account owner A, reviewed content outline and client contact A as approver.

Actions

Create a private-folder record, first-task record and welcome-message draft.

Exception

Unconfirmed access holds the job before any records are created.

Retry

A failed second action leaves the event retryable; the stable action key prevents the first record being duplicated in the sample adapter.

Limit

All records and integrations are invented and local. Production concurrency and real API behaviour need separate tests.

The sample onboarding route

1. Software

Receive the event

Identify the client, event and account owner.

2. Software

Check confirmed inputs

Require approved agreement, first deliverable, approver, access and standard scope.

3. Account owner

Hold exceptions

Resolve missing information or non-standard scope before continuing.

4. **Integration adapter**

Create the records

Use stable action keys for a private folder, first task and welcome draft.

5. **Person**

Approve the outgoing message

Review the welcome draft before any real sending integration is allowed.

The local example stops at creating the draft record. Human approval is a trusted input that a real implementation must obtain from an authenticated person.