Phase 4 :   Process Automation (Admin)

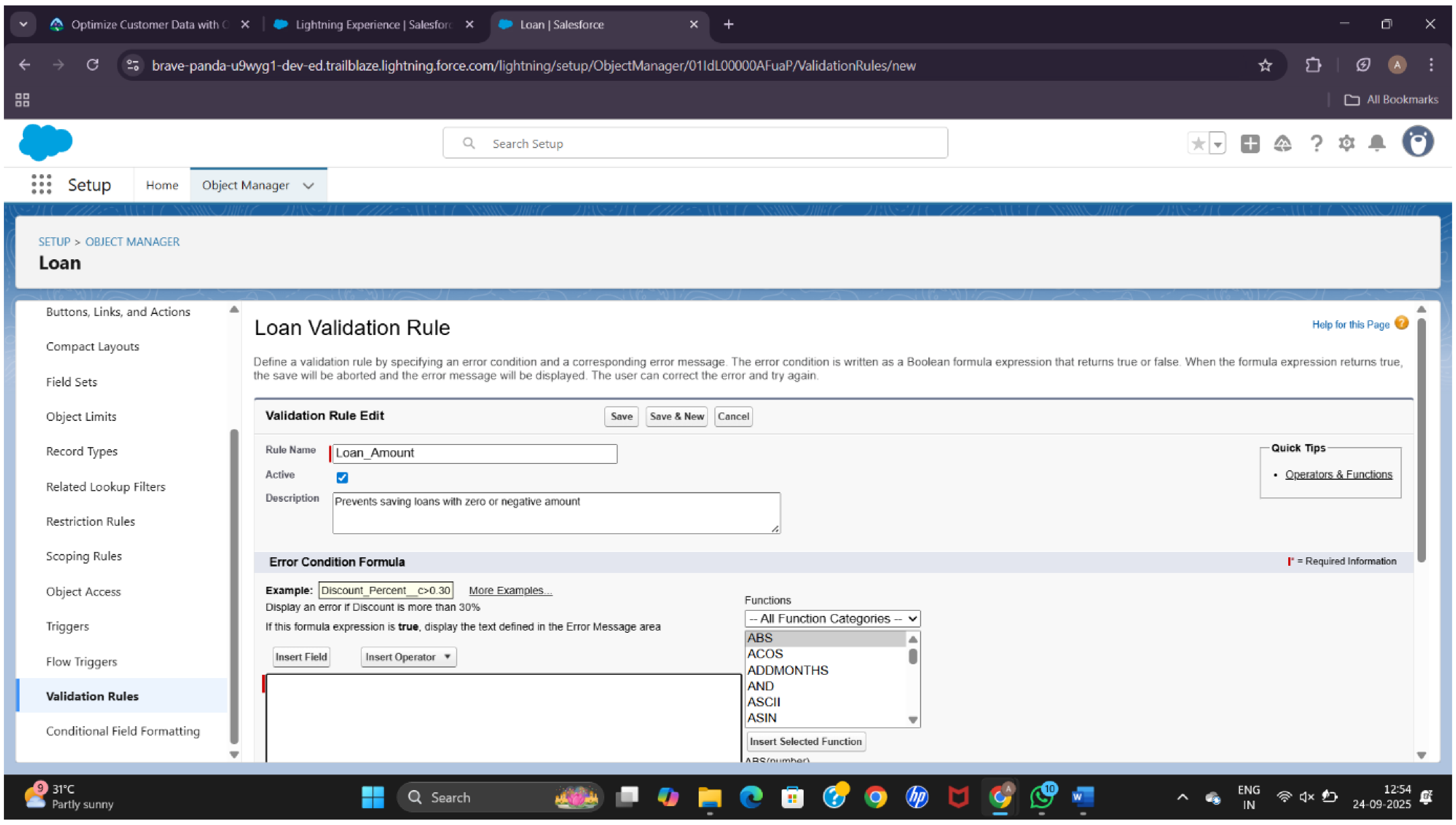
Problem Statement:

Currently, many banking processes such as loan approvals, customer follow-ups, service request handling, and account updates are manual and time-consuming. Staff spend a significant amount of time performing repetitive tasks like sending emails, updating statuses, or assigning tasks, which increases the risk of errors, delays, and missed deadlines.

1.Validation Rules:

. Validation Rules are rules that enforce data quality by preventing users from saving incorrect or incomplete records.

. They are written using formulas that evaluate field values, and if the formula returns TRUE, Salesforce shows an error message.

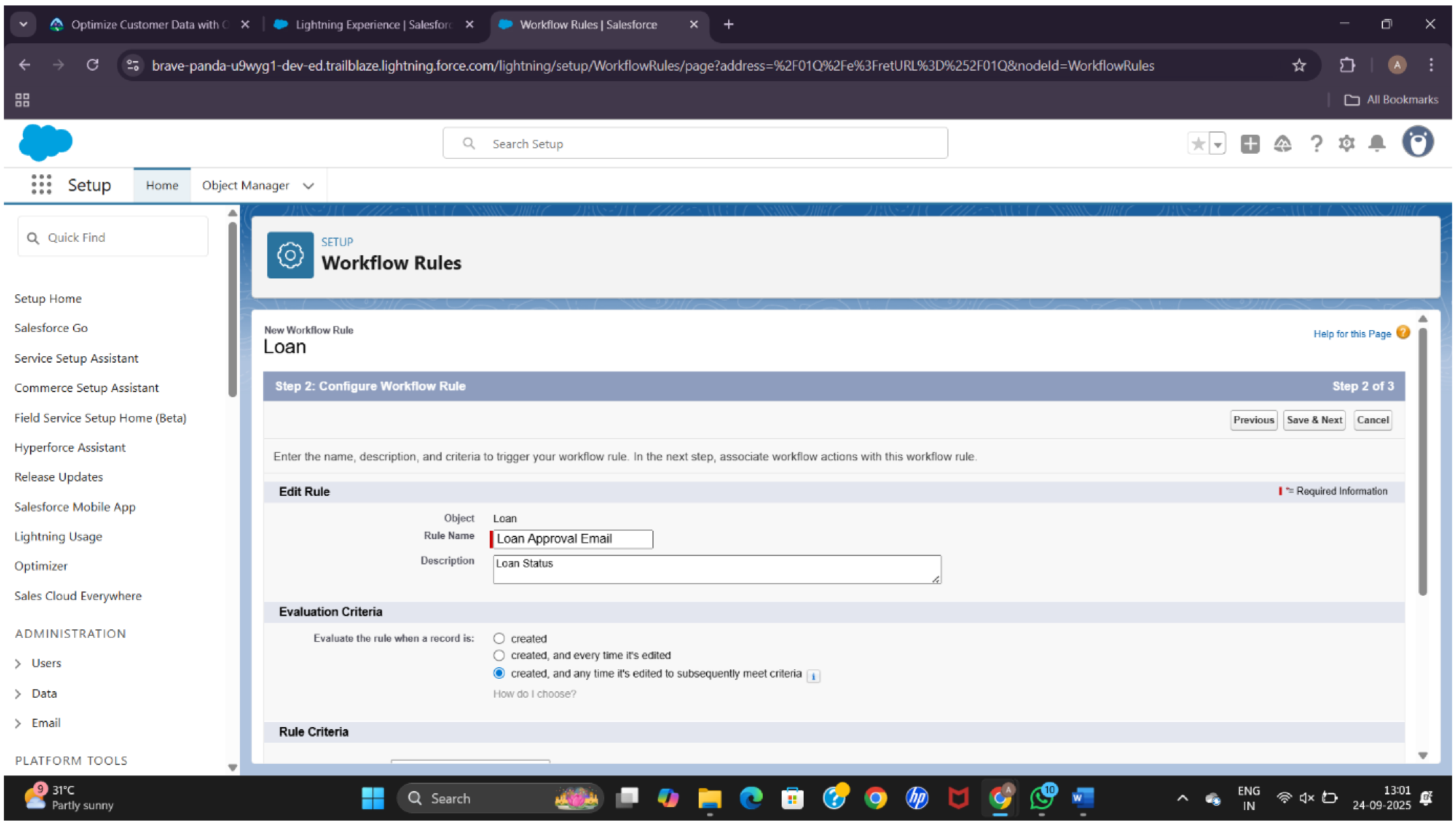


2.Workflow Rules:

. Workflow Rules are automation tools in Salesforce that trigger actions when certain criteria are met.

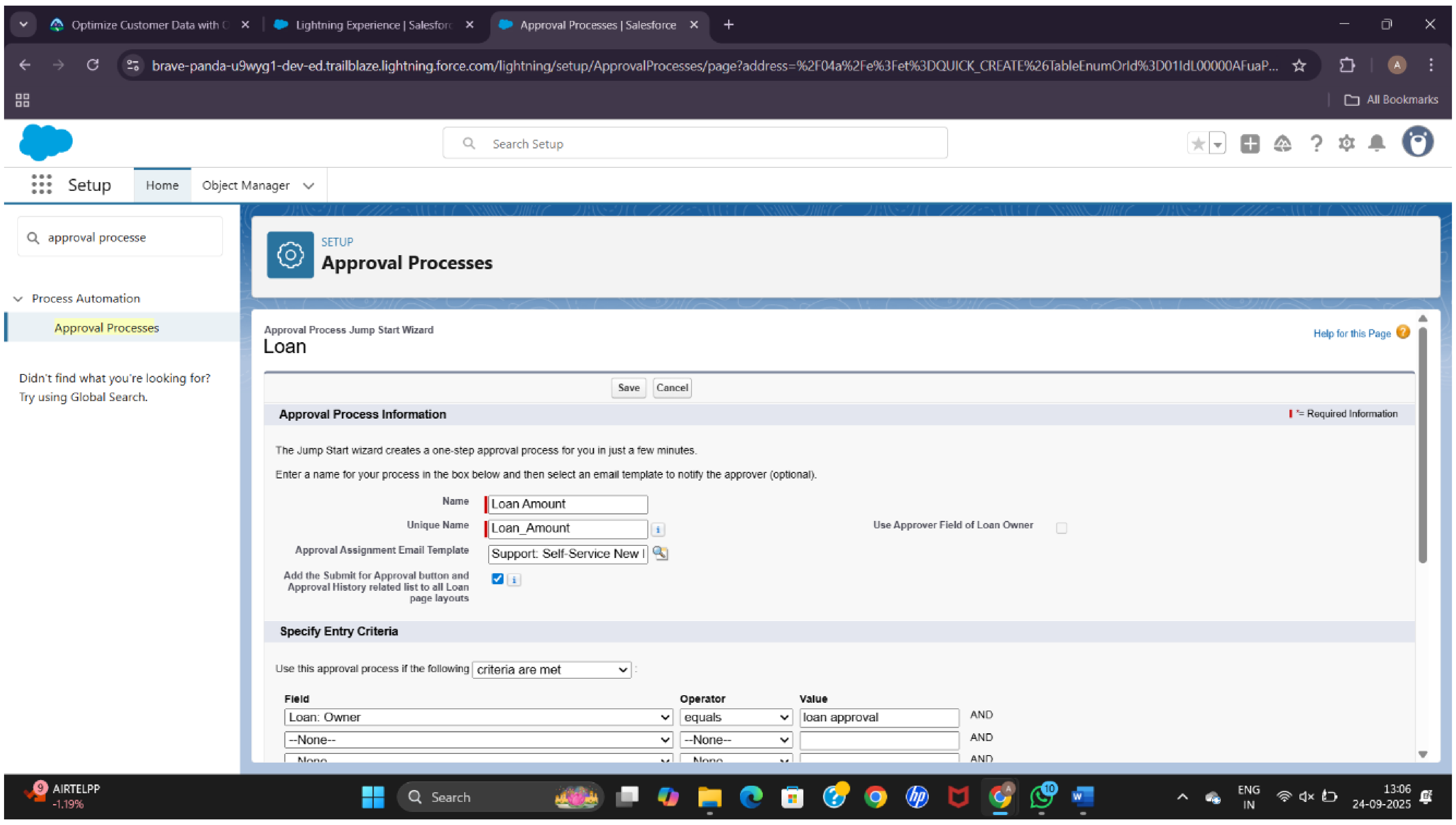
. They help automate tasks, emails, field updates, and outbound messages based on record changes.

. Automate loan approvals, customer follow-ups, and notifications.



3.Approval Process:

. An Approval Process automates how records are approved in Salesforce.



. It defines who approves a record, in what order, and what actions happen when approved or rejected.

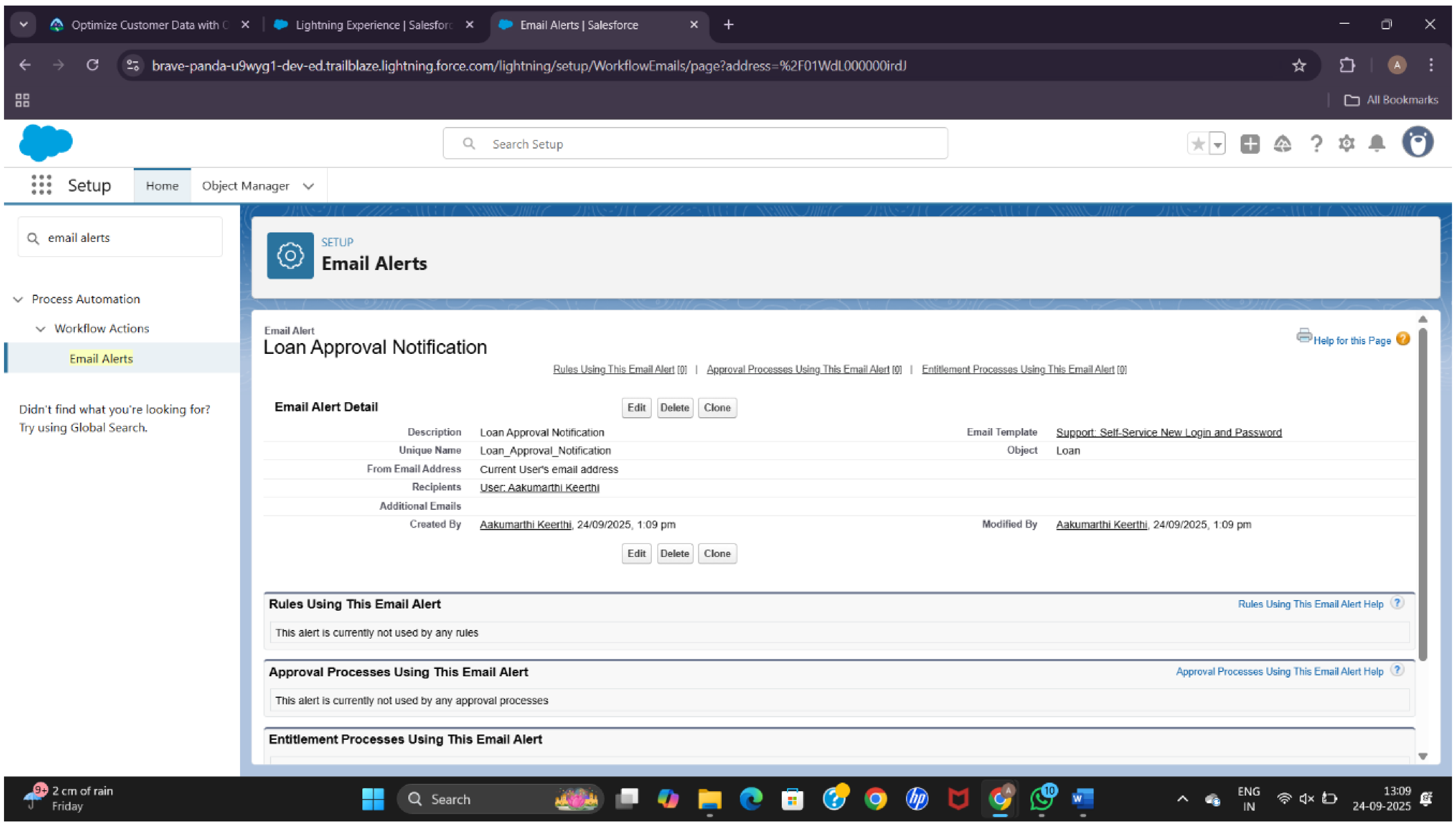
4.Email Alerts:

. Email Alerts are automated emails sent from Salesforce when specific conditions are met.

. They are often used with Workflow Rules, Process Builder, or Approval Processes.

. Notify Relationship Managers, Loan Officers, Branch Managers, or customers about important events.

Loan Approved: Send email to RM and customer when a loan is approved.



5.Tasks:

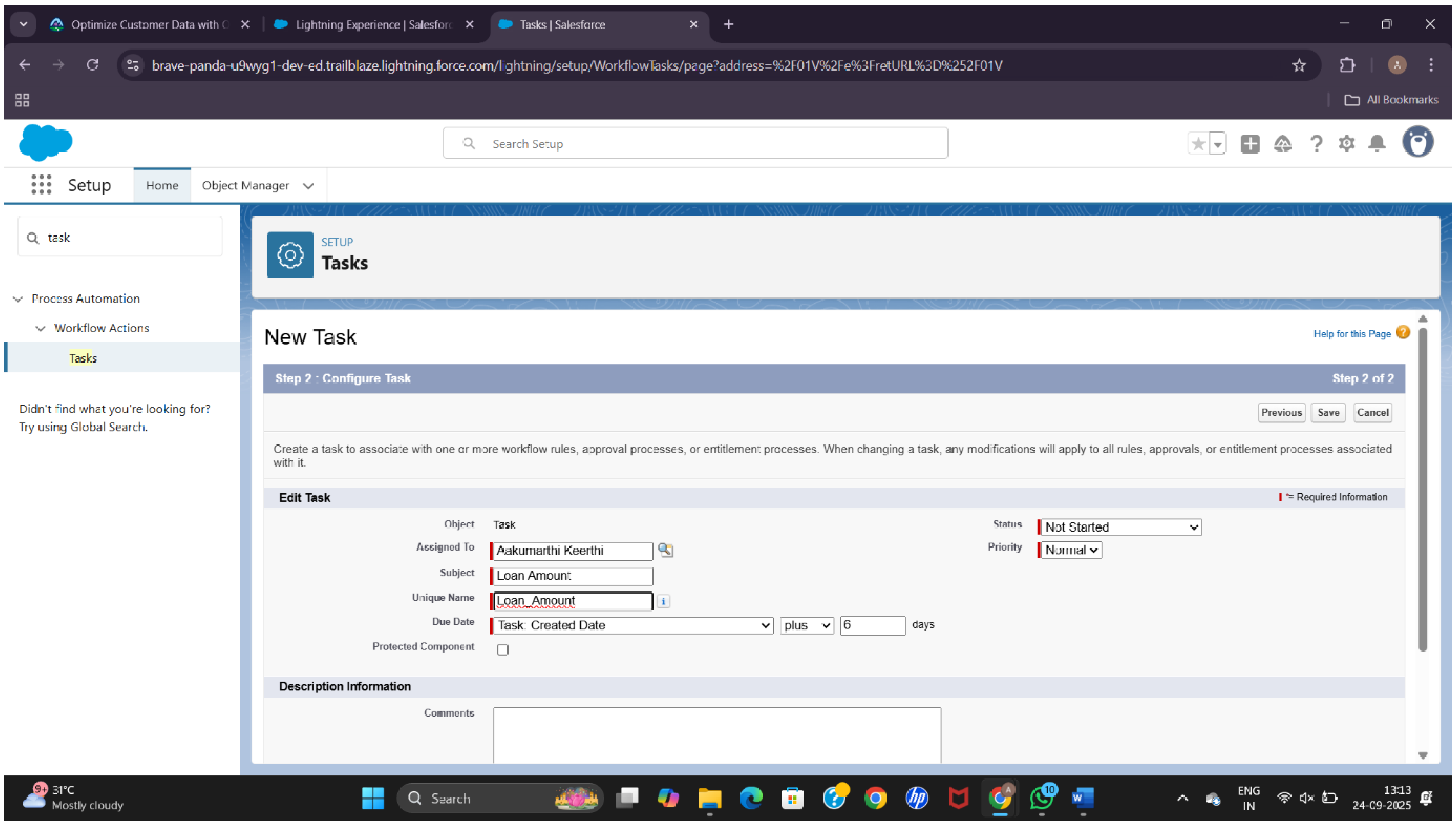
. Tasks are to-do items or actions assigned to users in Salesforce.

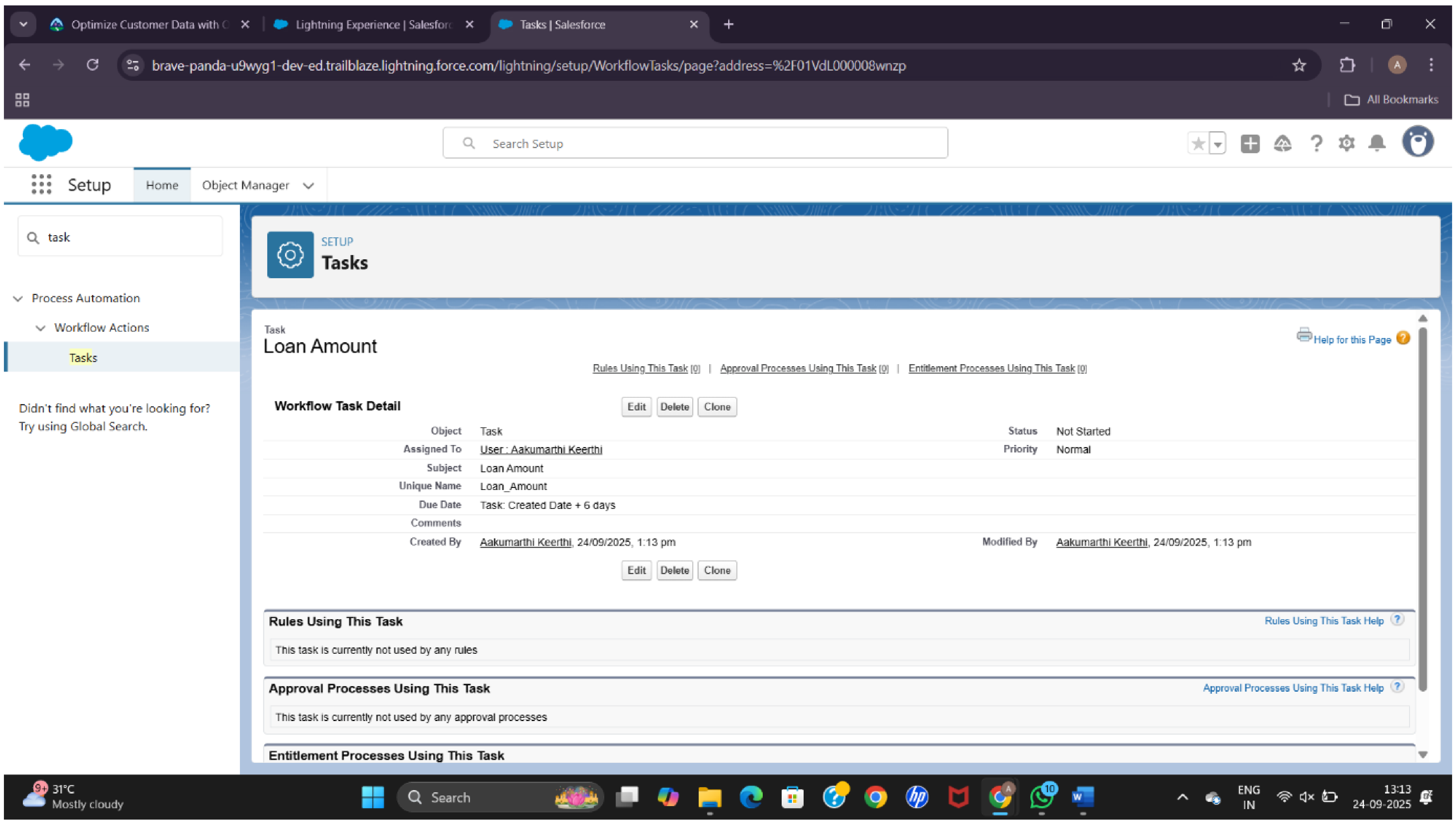
. They help users track follow-ups, deadlines, and important activities.

. Follow up with a customer about a loan application.

. Ensure Relationship Managers, Loan Officers, and Branch Managers follow up on loans, accounts, or service requests.

. Automate reminders and accountability for critical banking processes.





6.Custom Notifications:

. Custom Notifications are alerts sent to users within Salesforce or via mobile when specific events occur.

. Unlike emails, they appear directly in the Salesforce app, desktop, or mobile push notifications.