

# **“Government Schemes Management System”**

## **Phase 4: Process Automation (Admin)**

### **Validation Rules**

**Goal:** Ensure data integrity and prevent invalid entries in Scheme Applications.

#### **Rules Created:**

##### **1. Requested\_Amount\_Validation**

- **Object:** Scheme Application
- **Field:** Requested Amount
- **Formula:** Prevents Requested Amount from exceeding Approved Amount.
- **Error Message:** "Requested Amount cannot be greater than Approved Amount."
- **Active:** Yes

##### **2. Submission\_Date\_Validation**

- **Object:** Scheme Application
- **Field:** Submission Date
- **Formula:** Prevents users from entering a future date.
- **Error Message:** "Submission Date cannot be in the future."
- **Active:** Yes

#### **Impact:**

- Prevents invalid amounts or future submission dates.
- Improves data accuracy and reporting reliability.

## Scheme Application Validation Rule

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### Validation Rule Detail

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Rule Name	Requested_Amount_Validation	Active	✓
Error Condition Formula	Requested_Amount__c > Approved_Amount__c		
Error Message	Requested Amount cannot be greater than Approved Amount.	Error Location	Requested Amount
Description	Ensure that the Requested Amount does not exceed the Approved Amount in Scheme Applications.		
Created By	KAPPAACHCHITHA, 22/09/2025, 9:34 am	Modified By	KAPPAACHCHITHA, 22/09/2025, 9:34 am

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## Scheme Application Validation Rule

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### Validation Rule Detail

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Rule Name	Submission_Date_Validation	Active	✓
Error Condition Formula	Submission_Date__c > TODAY()		
Error Message	Submission Date cannot be in the future.	Error Location	Submission Date
Description			
Created By	KAPPAACHCHITHA, 22/09/2025, 9:35 am	Modified By	KAPPAACHCHITHA, 22/09/2025, 9:35 am

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## Workflow Rules / Field Updates

**Goal:** Automate key field updates and notifications.

### Workflow Rules Implemented:

#### 1. Auto Email on Submitted

- **Object:** Scheme Application
- **Action:** Sends email to Officer when a new Scheme Application is submitted.
- **Active:** Yes

#### 2. Set\_Stage\_In\_Review

- **Object:** Scheme Application
- **Action:** Updates Stage\_\_c to "In Review" when Status = Submitted.
- **Active:** Yes

### Impact:


- Officers automatically receive emails for new applications.

- Submitted applications are clearly marked as "In Review".

Workflow Rule

### Auto Email on Submitted

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#### Workflow Rule Detail

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Rule Name	Auto Email on Submitted	Object	Scheme Application
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created subsequently meet criteria
Description	Sends an email to Officer when a Scheme Application is submitted.		
Rule Criteria	Scheme Application: Status EQUALS Submitted		
Created By	KAPPAACHCHITHA, 23/09/2025, 8:27 pm		Modified By KAPPAACHCHITHA, 23/09/2025, 8:34 pm

#### Workflow Actions

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##### Immediate Workflow Actions

Type	Description
Email Alert	Email alert to notify officer when a new Scheme Application is submitted.
Email Alert	Citizen Application Submitted Alert

Workflow Rule

### Set Stage In Review

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#### Workflow Rule Detail

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Rule Name	Set Stage In Review	Object	Scheme Application
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created
Description			
Rule Criteria	Scheme Application: Status EQUALS Submitted		
Created By	KAPPAACHCHITHA, 24/09/2025, 9:38 pm		Modified By KAPPAACHCHITHA, 24/09/2025, 9:46 pm

#### Workflow Actions

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##### Immediate Workflow Actions

Type	Description
Field Update	Update Stage to In Review

## Record-Triggered Flow: Scheme Application – All Branches

**Goal:** Automate notifications, task creation, and logging for all submitted scheme applications.

### Flow Logic:

#### 1. Trigger:

- Object: Scheme Application
- Trigger: When a record is created or updated
- Entry Condition: Status = Submitted

#### 2. Decision Element: Scheme Type → Branch Selection

- Determines the branch of the submitted application (e.g., Health, Education, Welfare, etc.)

- Directs flow actions based on the branch type

### 3. Actions (Common for all branches):

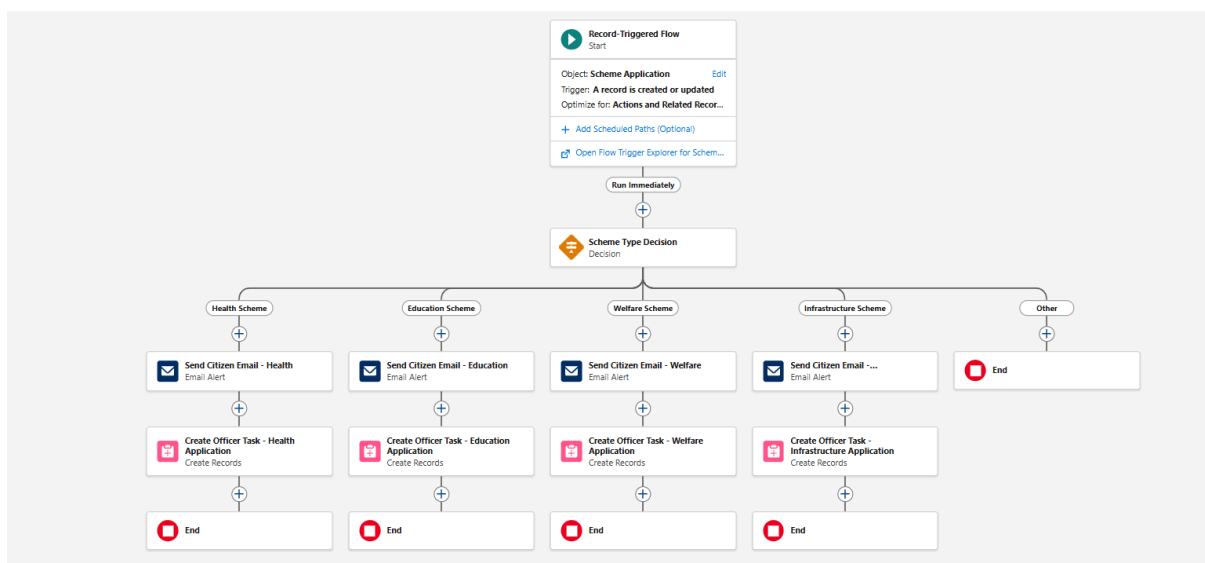
- **Send Citizen Email:** Sends an email notification to the citizen acknowledging submission of their application.
- **Create Task for Officer:** Automatically creates a task for the assigned officer to review the application.

#### 1. End:

- Flow ends after executing all actions for the specific branch.

#### Impact:

- Ensures timely assignment of tasks to officers for all scheme applications.
- Keeps citizens informed with automated emails and notifications.
- Standardizes application handling across all branches, improving efficiency and accountability.



### Record-Triggered Flow: Update Records – Set Status to Approved

**Goal:** Automatically update the Status of a Scheme Application to “Approved” when it has been approved by the officer.

#### Flow Element: Update Records

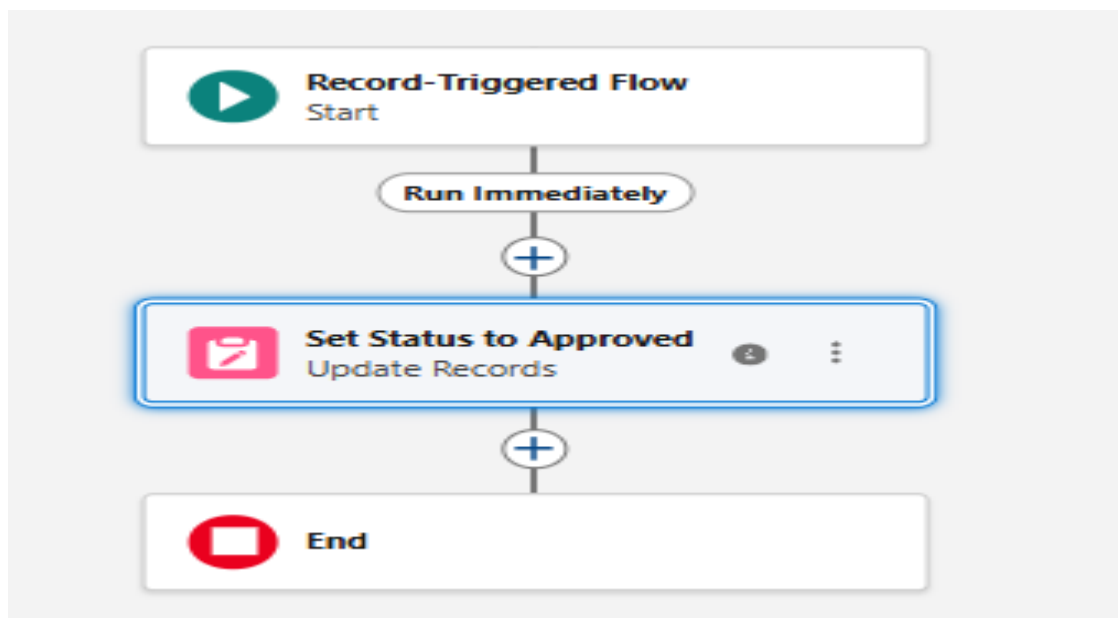
1. **Label:** Set Status to Approved
2. **API Name:** Set\_Status\_to\_Approved
3. **Description:** Updates the Status field of the Scheme Application to “Approved” when the field Approved\_\_c = True.

### Configuration:

- **Records to Update:** The Scheme Application record that triggered the flow.
- **Filter Conditions:** None – the record is always updated if it reaches this step.
- **Field Values to Update:**
  - Field: Status
  - Value: Approved

### Impact:

- Ensures that the Status field reflects the approval action automatically.
- Eliminates manual updates, improving workflow efficiency.
- Supports downstream automations and reporting by maintaining accurate application status.



### Approval Process

**Process Name:** Scheme Application Multi-Step Approval

**Objective:** To implement multi-step verification and approval for Scheme Applications.

### Steps:

1. **Entry Criteria:** Status = Submitted
2. **Initial Submitters:** Citizens (Scheme Application Owner)
3. **Approval Steps:**
  - **Step 1:** Officer Approval → Assigned to Officer profile

- **Step 2: Auditor Approval** → Assigned to Auditor profile
4. **Final Approval Actions:**
- Status updated → Approved
  - Optional Email Alert → Notify Citizen (Template: App\_Aproved\_Citizen)
5. **Final Rejection Actions:**
- Status updated → Rejected
  - Optional Email Alert → Notify Citizen (Template: App\_Rejected\_Citizen)
6. **Page Layout Settings:** Submit for Approval button and Approval History added.
7. **Submission Settings:** Allow submitters to recall approval requests.

**Impact:** Ensures structured review, automates notifications, and provides audit tracking.

Approval Processes  
 Scheme Application: Scheme Application Multi-Step Approval  
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Process Definition Detail		<div><div>Edit</div><div>Clone</div><div>Delete</div><div>Activate</div></div>	
Process Name	Scheme Application Multi-Step Approval		Active <input type="checkbox"/>
Unique Name	Auditor_Approval	Next Automated Approver Determined By	
Description			
Entry Criteria	Scheme Application: Status EQUALS Submitted		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	<a href="#">App_Aproved_Citizen</a>		
Initial Submitters	Scheme Application Owner, Role: Auditor, Role: Citizen		
Created By	KAPPAACHCHITHA, 24/09/2025, 9:29 pm	Modified By	KAPPAACHCHITHA, 24/09/2025, 9:31 pm

Approval Processes  
 Scheme Application: Scheme Application Multi-Step Approval  
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Process Definition Detail		<div>EditCloneDeleteActivate</div>
Process Name	Scheme Application Multi-Step Approval	Active <input type="checkbox"/>
Unique Name	Scheme_Application_Multi_Step_Approval	Next Automated Approver Determined By
Description		
Entry Criteria	Scheme Application: Status EQUALS Submitted	
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests <input checked="" type="checkbox"/>
Approval Assignment Email Template	<a href="#">App_Aproved_Citizen</a>	
Initial Submitters	Scheme Application Owner, Role: Citizen	
Created By	KAPPAACHCHITHA, 24/09/2025, 9:17 pm	Modified By KAPPAACHCHITHA, 24/09/2025, 9:21 pm

Email Alerts

Email alerts automate communication between Officers and Citizens to ensure timely notifications about Scheme Applications.

1. Citizen Application Submitted Alert

- **Object:** Scheme Application
- **Email Template:** App\_New\_Submitted\_Citizen
- **Trigger/Use:** Sent to the Citizen to confirm that their application has been submitted successfully.
- **Purpose:** Keeps the citizen informed and provides acknowledgment of submission.

2. Officer Notification Alert

- **Object:** Scheme Application
- **Email Template:** App\_New\_Submitted\_Officer
- **Trigger/Use:** Sent to the Officer when a new Scheme Application is submitted.
- **Purpose:** Ensures Officers are notified to review the submitted application promptly.

Impact:

- Automates notifications, reducing manual communication.
- Keeps all stakeholders informed in real-time.
- Supports faster processing of submitted applications.

Email Alert

Citizen Application Submitted Alert

[Printable](#)

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Rules Using This Email Alert (1) | Approval Processes Using This Email Alert (0) | Entitlement Processes Using This Email Alert (0)

Email Alert Detail

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Description	Citizen Application Submitted Alert	Email Template	App_New_Submitted_Citizen
Unique Name	Citizen_Application_Submitted_Alert	Object	Scheme Application
From Email Address	Current User's email address		
Recipients	<a href="#">Group: Citizen Group</a> <a href="#">Role: Citizen</a> <a href="#">User: Citizen One</a>		
Additional Emails			
Created By	<a href="#">KAPPAACHCHITHA</a> , 23/09/2025, 1:42 pm		Modified By <a href="#">KAPPAACHCHITHA</a> , 23/09/2025, 2:03 pm

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## Email alert to notify officer when a new Scheme Application is submitted.

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### Email Alert Detail

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Description	Email alert to notify officer when a new Scheme Application is submitted.		Email Template	<a href="#">App_New_Submitted_Officer</a>
Unique Name	<a href="#">App_New_Submitted_Officer</a>		Object	Scheme Application
From Email Address	Current User's email address			
Recipients	<a href="#">Role: Scheme Officer</a> <a href="#">User: Officer One</a>			
Additional Emails				
Created By	<a href="#">KAPPAACHCHITHA</a> , 22/09/2025, 4:07 pm		Modified By	<a href="#">KAPPAACHCHITHA</a> , 22/09/2025, 4:07 pm

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## Email Folders & Templates

### Email Folder:

- **Name:** Govt Schemes Templates
- **Purpose:** Organizes all email templates for easy access, management, and reusability.

### Email Templates:

- Templates are reusable email messages that can be linked to workflows, flows, or approval processes to automate notifications.

### Templates Created:

1. **App\_New\_Submitted\_Citizen** → Notifies Citizens about application submission.
2. **App\_New\_Submitted\_Officer** → Notifies Officers about new submissions.
3. **App\_Approved\_Citizen** → Notifies Citizens when application is approved.
4. **App\_Approved\_Officer** → Notifies Officers when an application is approved.
5. **App\_Rejected\_Citizen** → Notifies Citizens when an application is rejected.
6. **Fund\_Disbursed\_Citizen** → Notifies Citizens when funds are released.
7. **Fund\_Transaction\_Issue\_Officer** → Notifies Officers about fund transaction issues.

### Impact:

- Ensures consistent, professional communication.
- Reduces manual email sending.
- Supports automation in workflows, flows, and approval processes.
- Centralized folder allows easy updates and maintenance of templates.