Phase 4: Process Automation (Admin) – Revaa

This phase focused on implementing **automation for transactions, portfolios, withdrawals, and reporting** in Revaa. We combined **Validation Rules, Workflow Rules, Process Builder, Approval Process, Record-Triggered Flows, and Scheduled Flows**.

◆ 4.1 Validation Rules

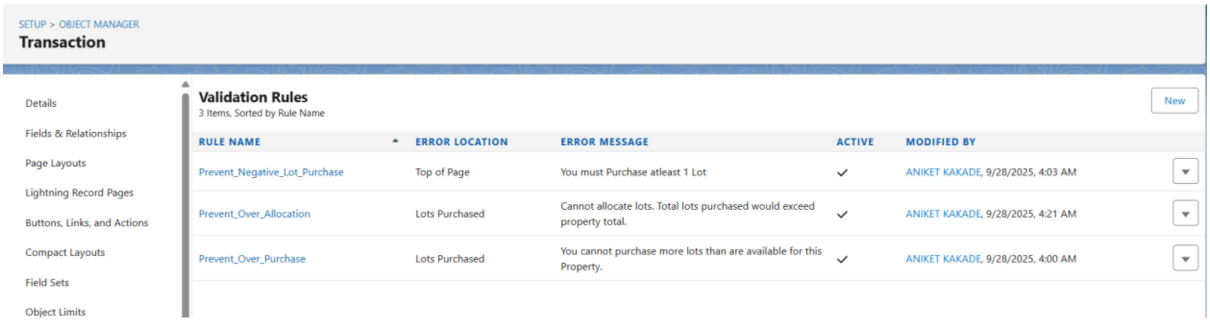
We created multiple validation rules to ensure **data integrity** across objects.

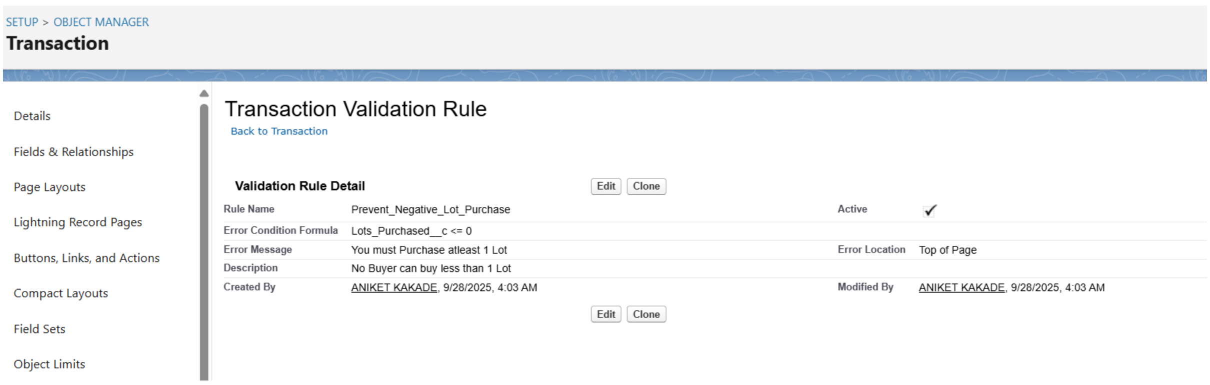
4.1.1 Ownership Percentage Required

- **Object:** Transaction__c
- **Rule Name:** Ownership_Percentage_Required
- **Error Condition Formula:**

ISBLANK(Ownership_Percent__c)

- **Error Message:** Ownership Percent must be entered for every transaction.



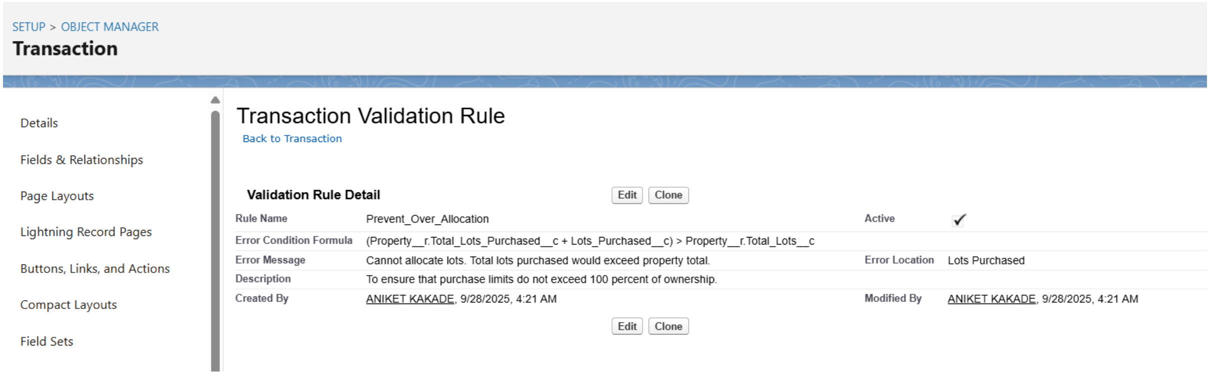


4.1.2 Ownership Percent Greater Than Zero

- **Object:** Transaction__c
- **Rule Name:** Ownership_Consistency
- **Error Condition Formula:**

Ownership_Percent__c <= 0

- **Error Message:** Ownership Percent must be greater than 0.

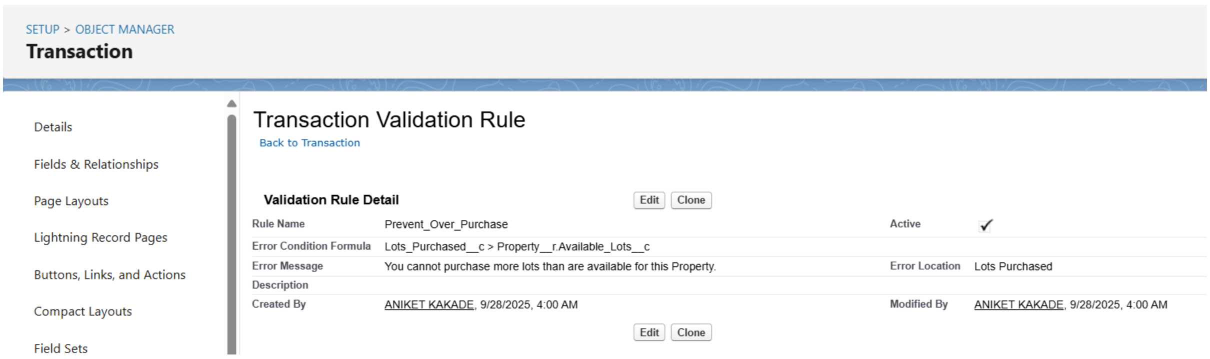


4.1.3 Profit Amount Required for Profit Distribution

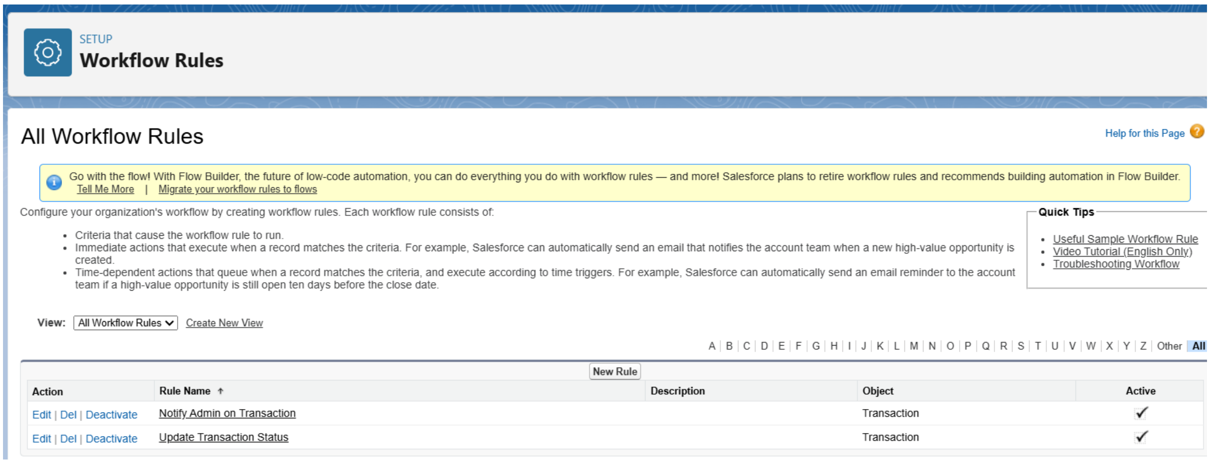
- **Object:** Property__c
- **Rule Name:** Profit_Amount_Required
- **Error Condition Formula:**

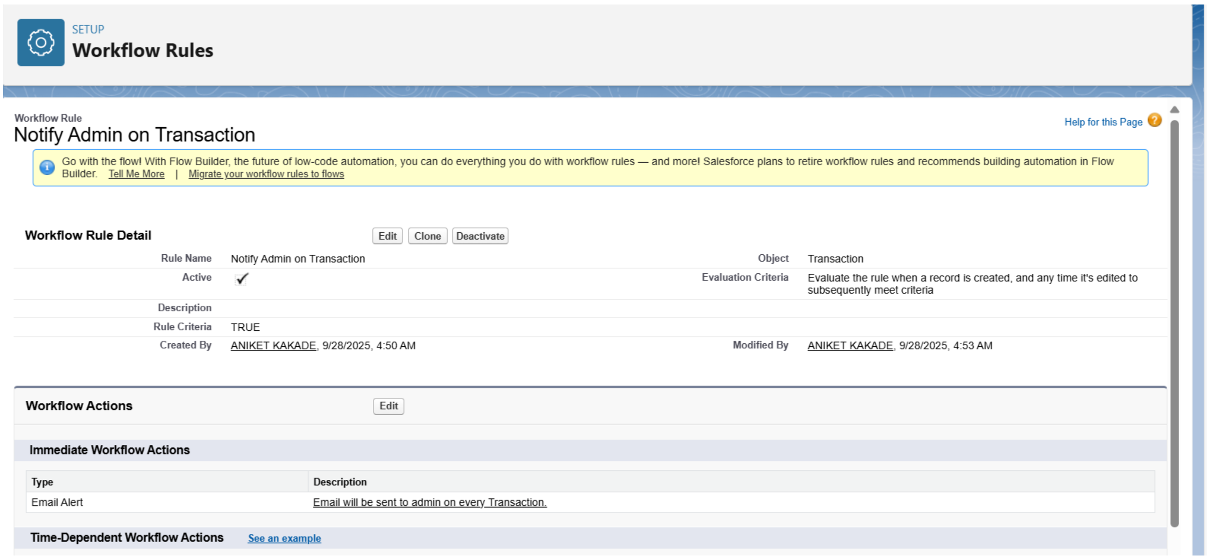
ISPICKVAL(Transaction_Type__c, "Profit Distribution") && ISBLANK(Profit_Amount__c)

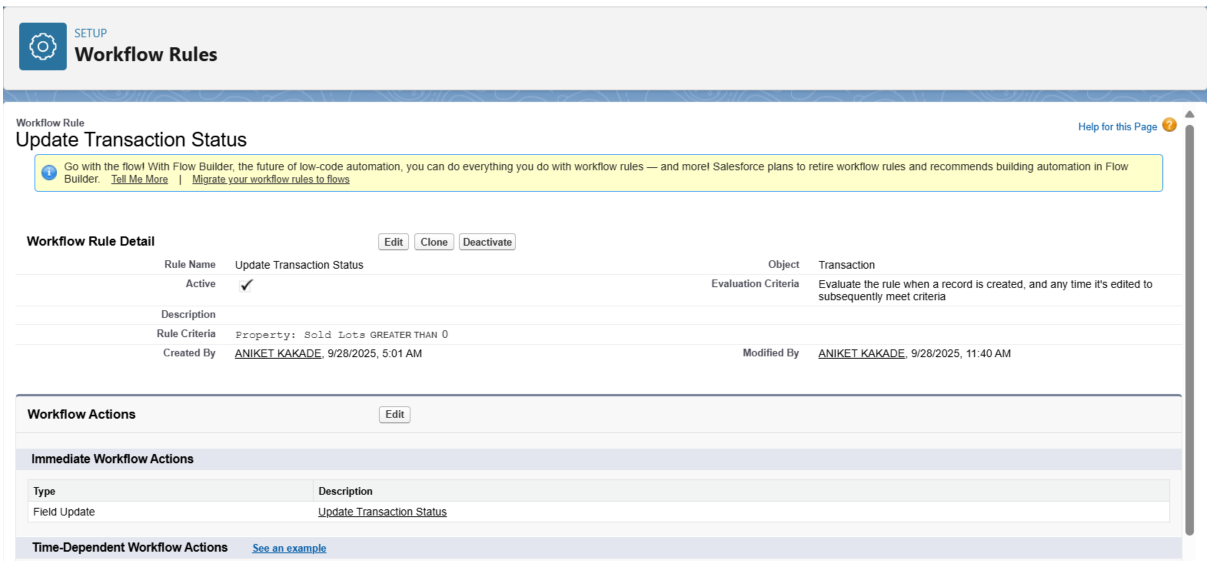
- **Error Message:** Profit Amount must be entered before distributing profit.



4.2 Workflow Rules







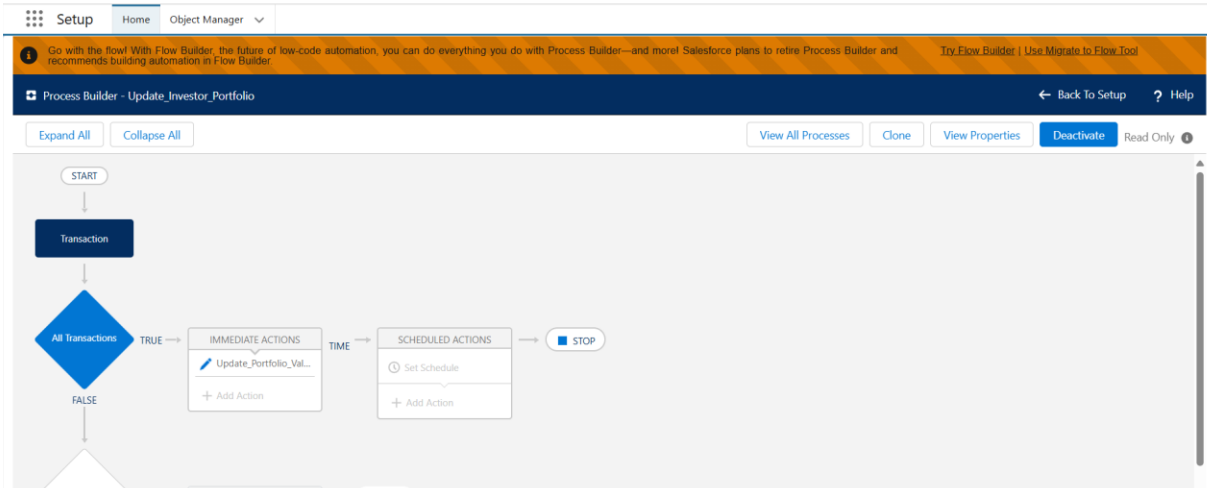
◆ 4.3 Process Builder

4.3.1 Update Investor Portfolio Value

- **Process Name:** Update_Portfolio_Value
- **Object:** Transaction__c
- **Trigger:** When record is created or edited
- **Immediate Action:** Update **Investor__c.Total_Investment__c**

Formula used:

[Investor__c].Total_Investment__c + [Transaction__c].Amount__c



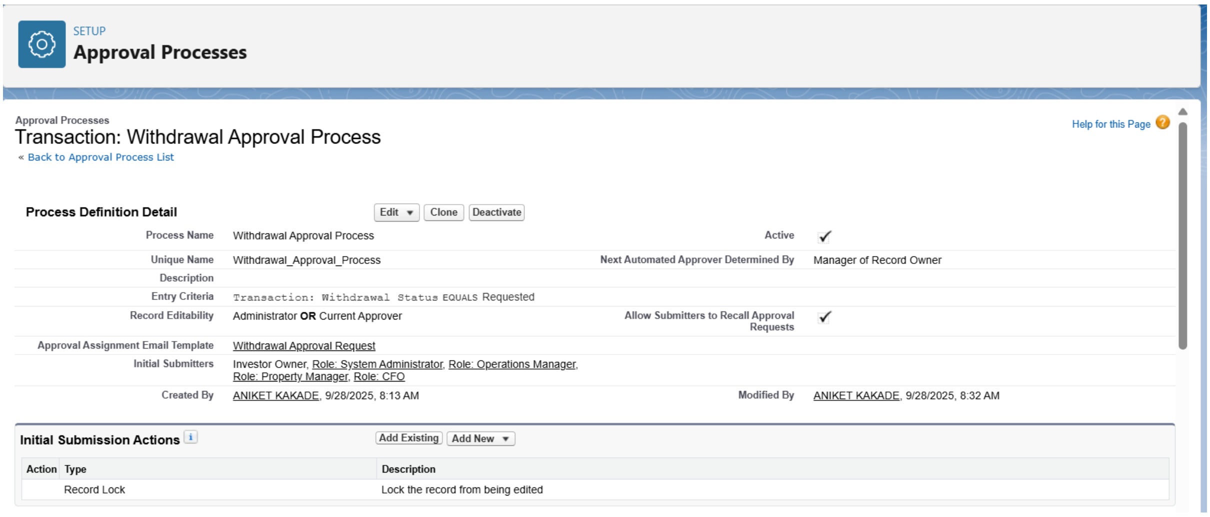
◆ 4.4 Approval Process

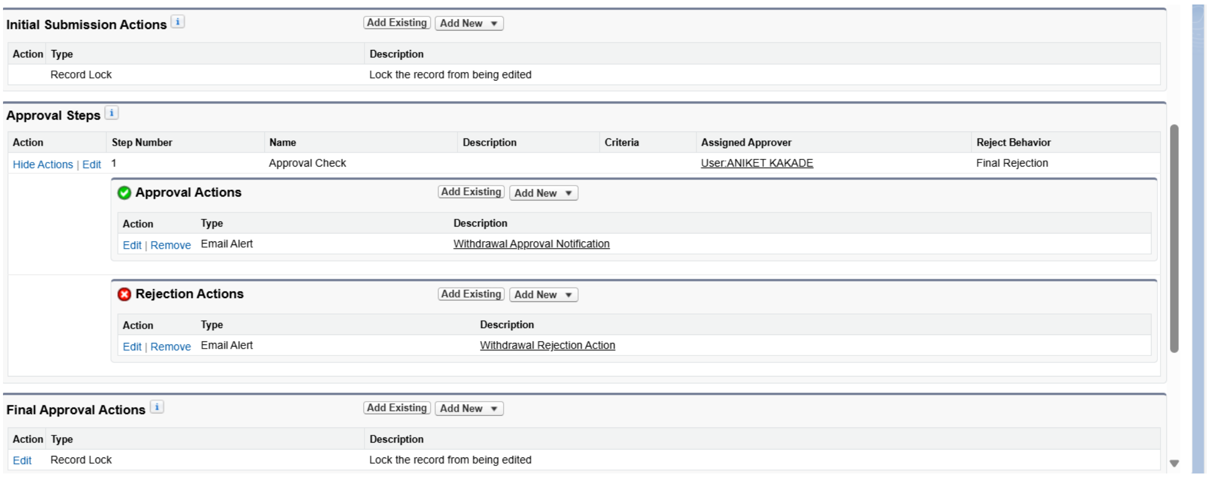
4.4.1 Withdrawal Approval Workflow

- **Object:** Transaction__c
- **Process Name:** Withdrawal_Approval
- **Entry Criteria:**

Transaction_Type__c = 'Withdrawal'

- **Approvers:** CFO Role
- **Email Alerts:**
  - **Withdrawal_Approval_Template** (sent when approved)
  - **Withdrawal_Rejection_Template** (sent when rejected)

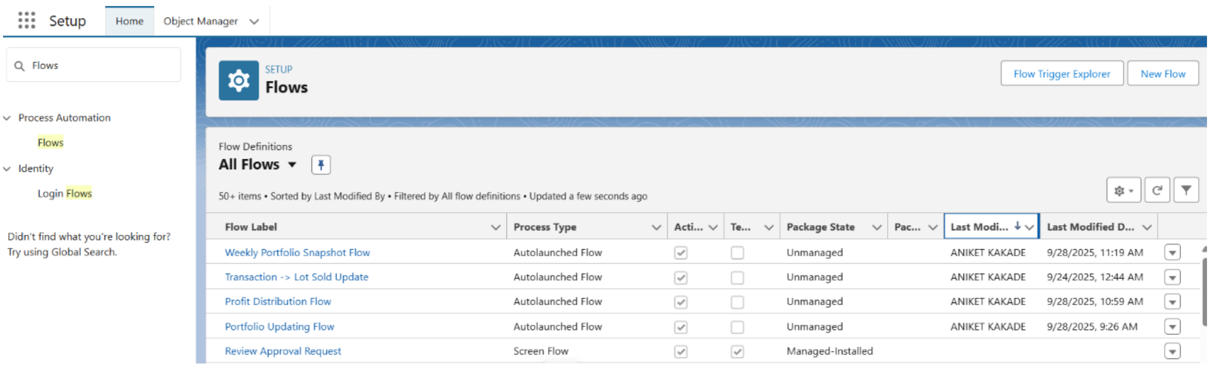

SETUP
Approval Processes
Approval Processes
Transaction: Withdrawal Approval Process
« Back to Approval Process List
Help for this Page
Process Definition Detail
Edit
Clone
Deactivate
Process Name
Withdrawal Approval Process
Active
Unique Name
Withdrawal_Approval_Process
Next Automated Approver Determined By
Manager of Record Owner
Description
Entry Criteria
Transaction: Withdrawal Status EQUALS Requested
Record Editability
Administrator OR Current Approver
Allow Submitters to Recall Approval Requests
Approval Assignment Email Template
Withdrawal Approval Request
Initial Submitters
Investor Owner, Role: System Administrator, Role: Operations Manager, Role: Property Manager, Role: CFO
Created By
ANIKET KAKADE, 9/28/2025, 8:13 AM
Modified By
ANIKET KAKADE, 9/28/2025, 8:32 AM
Initial Submission Actions
Add Existing
Add New
Action
Type
Description
Record Lock
Lock the record from being edited

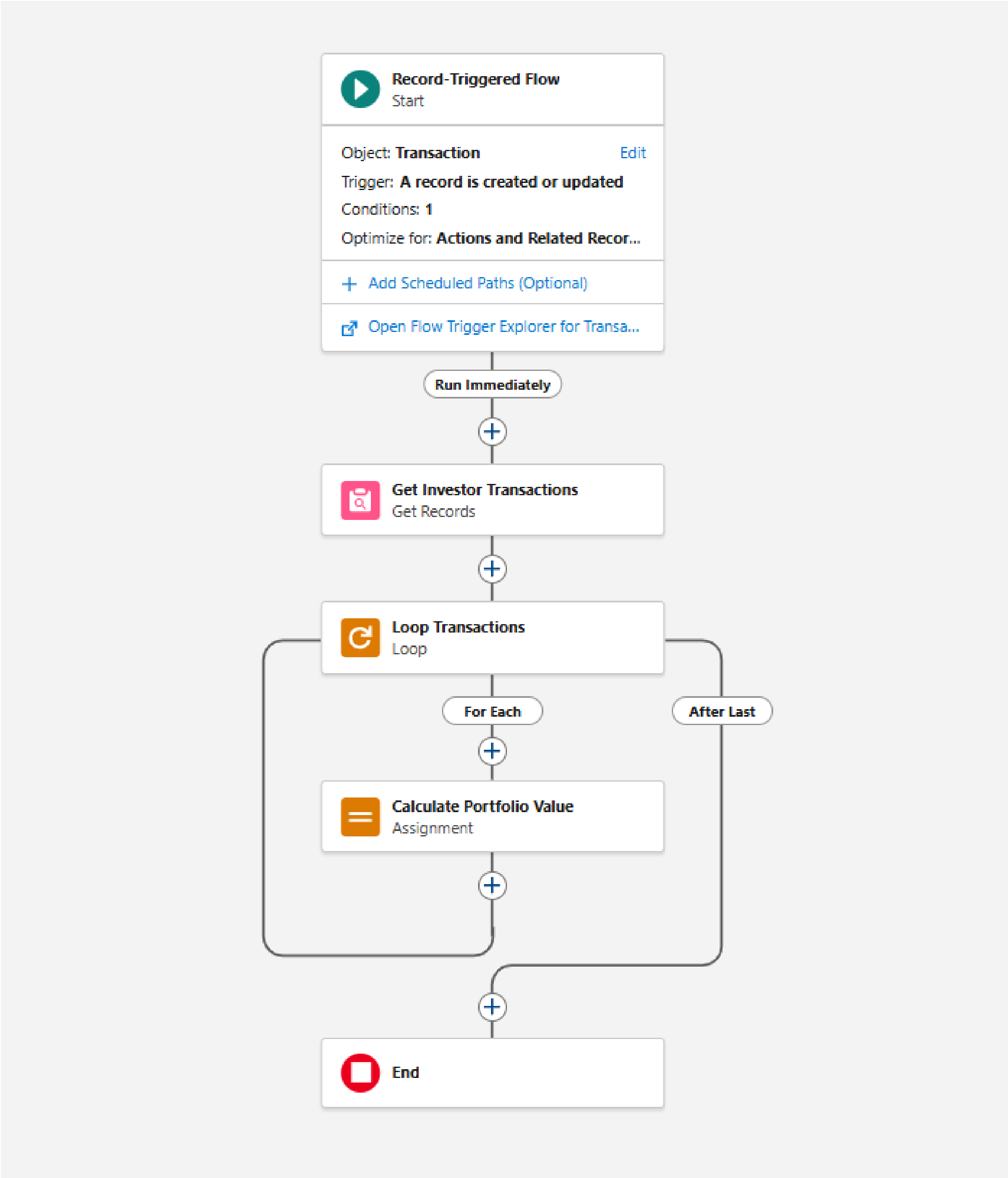

Initial Submission Actions
Add Existing
Add New
Action
Type
Description
Record Lock
Lock the record from being edited
Approval Steps
Action
Step Number
Name
Description
Criteria
Assigned Approver
Reject Behavior
Hide Actions | Edit
1
Approval Check
User:ANIKET KAKADE
Final Rejection
Approval Actions
Add Existing
Add New
Action
Type
Description
Edit | Remove
Email Alert
Withdrawal Approval Notification
Rejection Actions
Add Existing
Add New
Action
Type
Description
Edit | Remove
Email Alert
Withdrawal Rejection Action
Final Approval Actions
Add Existing
Add New
Action
Type
Description
Edit
Record Lock
Lock the record from being edited

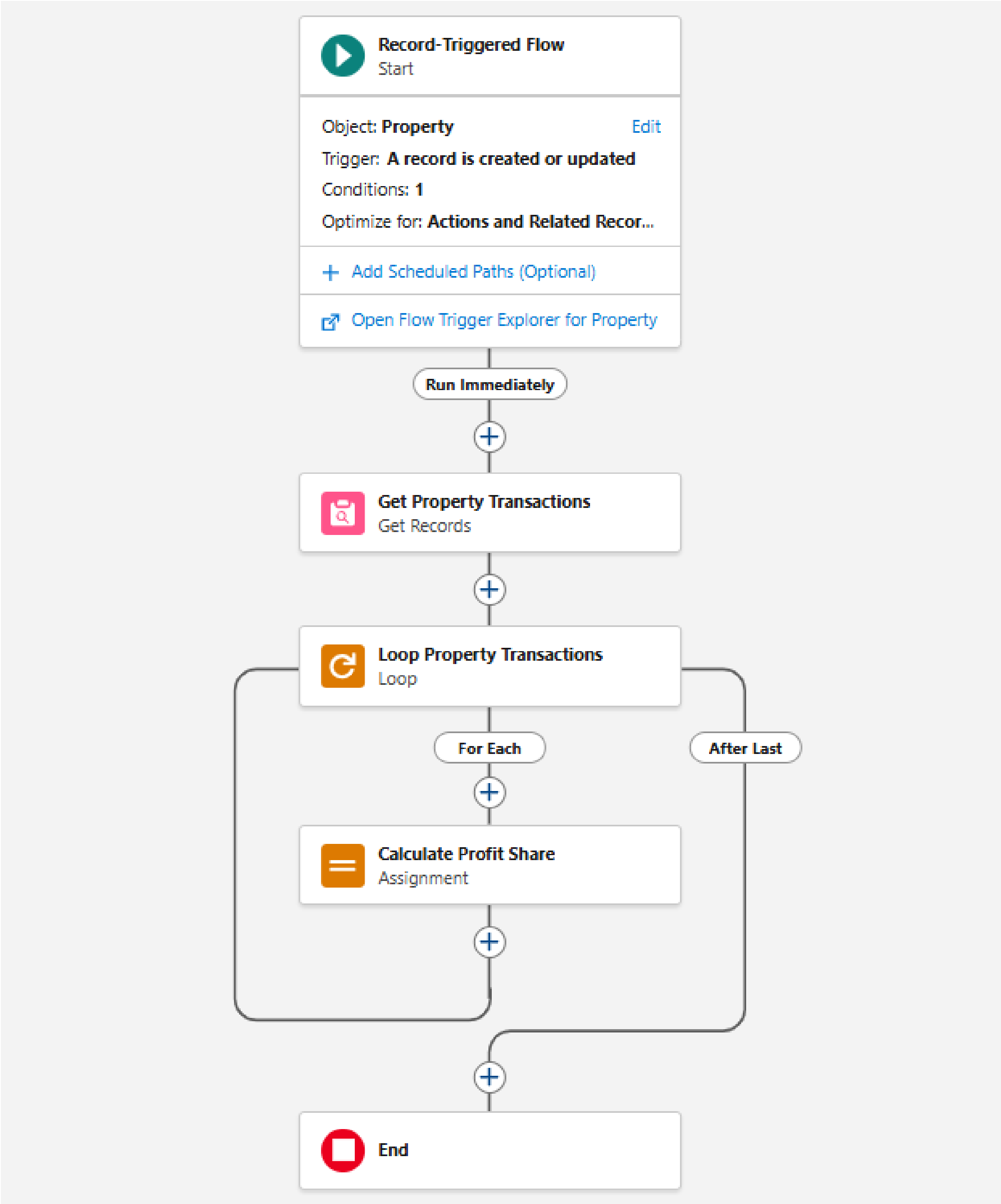
◆ 4.5 Record-Triggered Flow

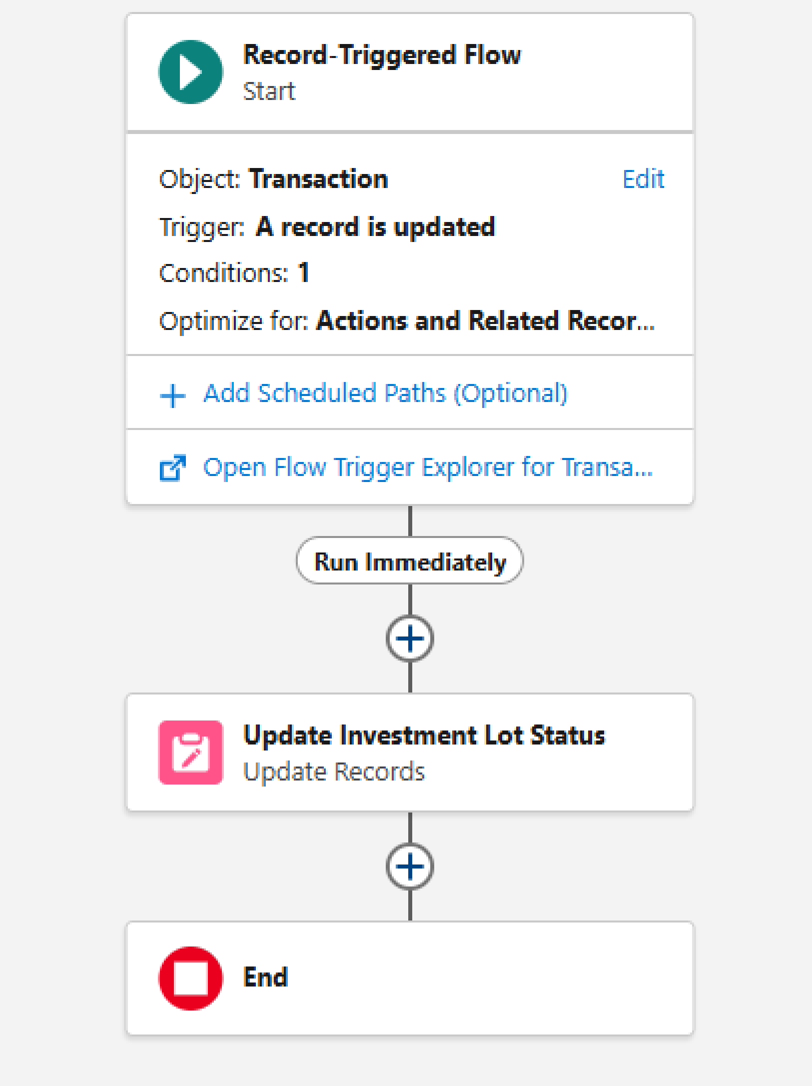
4.5.1 Profit Distribution Flow

- **Flow Name:** Profit_Distribution_Flow
- **Trigger:** On Property__c (when Profit_Amount__c is updated)
- **Steps:**
    1. **Get Records:** Fetch all Transaction__c linked to Property.
    2. **Loop:** Loop over each Transaction.
    3. **Assignment:**
    4. {!Loop_Transactions.Profit_Share__c} =
    5. ({!Loop_Transactions.Ownership_Percent__c} * {!$Record.Profit_Amount__c}) / 100
    6. **Update Records:** Update each Transaction with Profit_Share__c.




Record-Triggered Flow
Start
Object: Transaction
Edit
Trigger: A record is created or updated
Conditions: 1
Optimize for: Actions and Related Recor...
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Transa...
Run Immediately
Get Investor Transactions
Get Records
Loop Transactions
Loop
For Each
After Last
Calculate Portfolio Value
Assignment
End


Record-Triggered Flow
Start
Object: Property
Edit
Trigger: A record is created or updated
Conditions: 1
Optimize for: Actions and Related Recor...
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Property
Run Immediately
Get Property Transactions
Get Records
Loop Property Transactions
Loop
For Each
After Last
Calculate Profit Share
Assignment
End

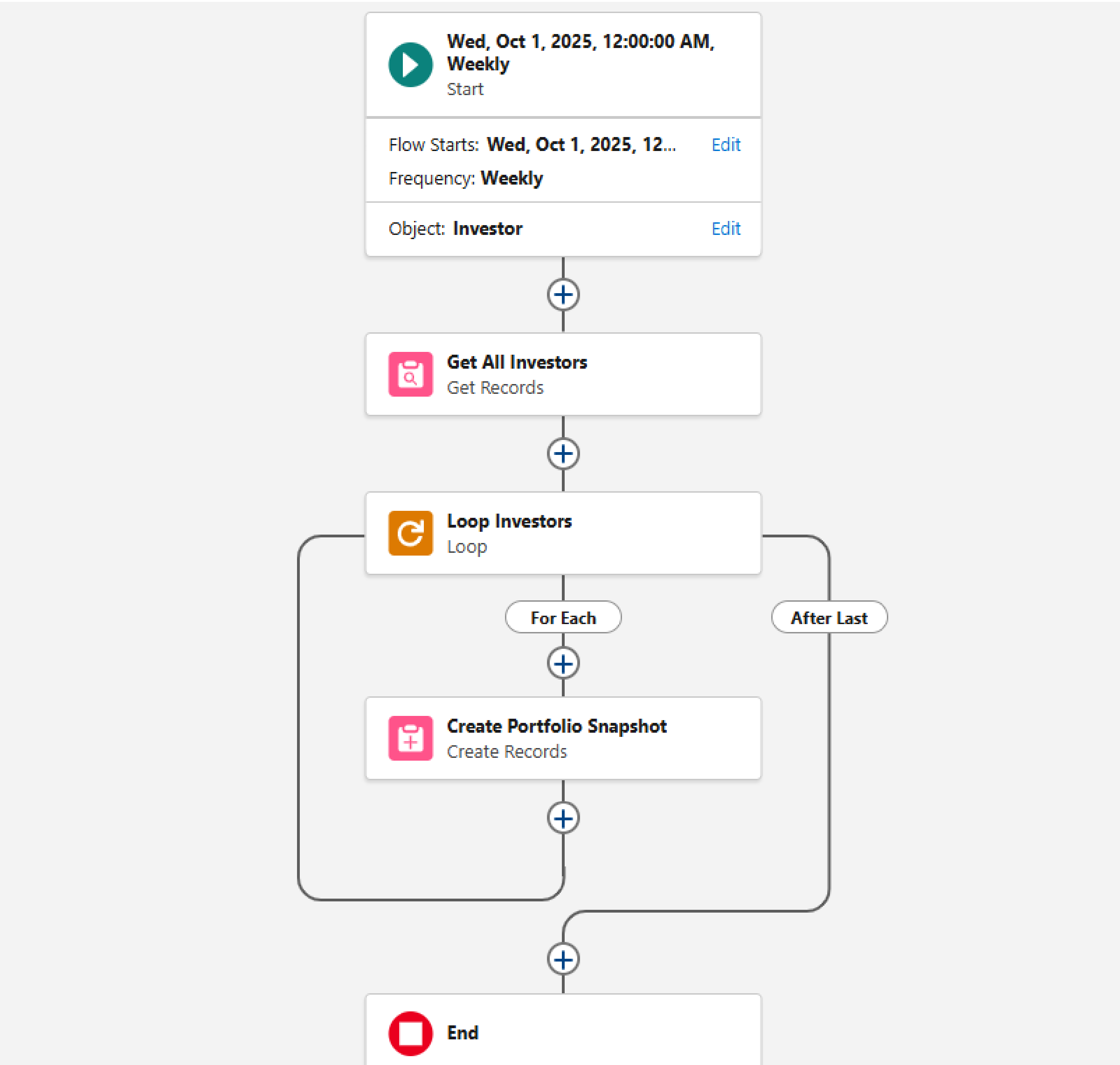


4.6 Scheduled Flow

4.6.1 Weekly Portfolio Snapshot

- **Flow Name:** Weekly_Portfolio_Snapshot_Flow
- **Trigger:** Scheduled – last day of every month, 11:59 PM
- **Steps:**
    1. **Get Records:** Get all Investor__c.
    2. **Loop:** For each Investor.
    3. **Create Record:** Portfolio_Snapshot__c with:

- **Investor__c** = {!Loop_Investors.Id}
- **Snapshot_Date__c** = $Flow.CurrentDate
- **Total_Value__c** = {!Loop_Investors.Total_Investment__c}



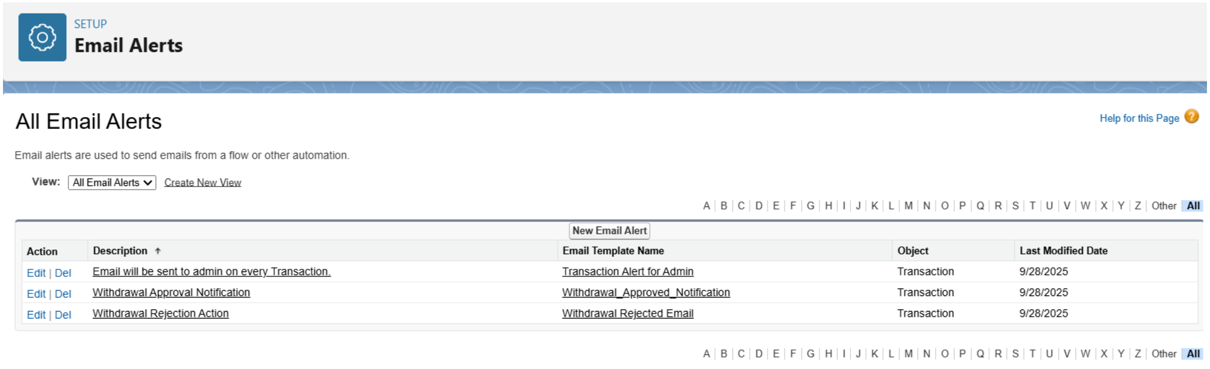
4.7 Email Alerts

Email Templates Created

1. **Investor_Welcome_Template**
   - Sent when a new Investor is created.
2. **Withdrawal_Approval_Template**

- Subject: "Your Withdrawal Request has been Approved"
- Body: Includes Transaction amount, Property name, Approval details.

3. **Withdrawal_Rejection_Template**
   - Subject: "Your Withdrawal Request has been Rejected"
   - Body: Includes Transaction details and rejection reason.



✅ Phase 4 Outcomes

- Transactions validated for ownership consistency.
- Investors welcomed via automated email.
- Portfolio values updated dynamically after every transaction.
- Withdrawal requests routed through CFO approval with email notifications.
- Profit distributions automated across investors based on ownership %.
- Monthly portfolio snapshots created automatically for reporting.
- End-to-end automation backbone implemented for **Revaa**.