

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.

The screenshot shows the 'Validation Rules' section for the 'Transaction' object. It lists three rules: 'Prevent_Negative_Lot_Purchase', 'Prevent_Over_Allocation', and 'Prevent_Over_Purchase'. The 'Prevent_Negative_Lot_Purchase' rule has an error message 'You must Purchase atleast 1 Lot' and is active. The 'Prevent_Over_Allocation' rule has an error message 'Cannot allocate lots. Total lots purchased would exceed property total.' and is active. The 'Prevent_Over_Purchase' rule has an error message 'You cannot purchase more lots than are available for this Property.' and is active. The 'New' button is visible at the top right of the table.

The screenshot shows the 'Transaction Validation Rule' detail page. It displays the 'Validation Rule Detail' section with the following information:

- Rule Name: Prevent_Negative_Lot_Purchase
- Error Condition Formula: Lots_Purchased__c <= 0
- Error Message: You must Purchase atleast 1 Lot
- Description: No Buyer can buy less than 1 Lot
- Created By: ANIKET KAKADE, 9/28/2025, 4:03 AM
- Active: ✓
- Error Location: Top of Page
- Modified By: ANIKET KAKADE, 9/28/2025, 4:03 AM

The 'Edit' and 'Clone' buttons are located at the bottom of the detail section.

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.

The screenshot shows the 'Transaction Validation Rule' page in the Salesforce Object Manager. The rule is named 'Prevent_Over_Allocation' and has the formula `(Property__r.Total_Lots_Purchased__c + Lots_Purchased__c) > Property__r.Total_Lots__c`. The error message is 'Cannot allocate lots. Total lots purchased would exceed property total.' The rule is active and was created by ANIKET KAKADE on 9/28/2025 at 4:21 AM.

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.

The screenshot shows the 'Transaction Validation Rule' page in the Salesforce Object Manager. The rule is named 'Prevent_Over_Purchase' and has the formula `Lots_Purchased__c > Property__r.Available_Lots__c`. The error message is 'You cannot purchase more lots than are available for this Property.' The rule is active and was created by ANIKET KAKADE on 9/28/2025 at 4:00 AM.

◆ 4.2 Workflow Rules

SETUP **Workflow Rules**

All Workflow Rules [Help for this Page](#)

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

Quick Tips

- Useful Sample Workflow Rule
- Video Tutorial (English Only)
- Troubleshooting Workflow

View: [All Workflow Rules](#) [Create New View](#)

[A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#) [Other](#) [All](#)

| Action | Rule Name | Description | Object | Active |
|---|-----------------------------|-------------|-------------|-------------------------------------|
| Edit Del Deactivate | Notify Admin on Transaction | | Transaction | <input checked="" type="checkbox"/> |
| Edit Del Deactivate | Update Transaction Status | | Transaction | <input checked="" type="checkbox"/> |

SETUP **Workflow Rules**

Workflow Rule **Notify Admin on Transaction** [Help for this Page](#)

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail

| Rule Name | Description | Object | Evaluation Criteria |
|-----------------------------|---------------|----------------------------------|--|
| Notify Admin on Transaction | Active | Transaction | Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria |
| | Description | | |
| | Rule Criteria | TRUE | |
| | Created By | ANIKET KAKADE 9/28/2025, 4:50 AM | Modified By ANIKET KAKADE 9/28/2025, 4:53 AM |

Workflow Actions [Edit](#)

Immediate Workflow Actions

| Type | Description |
|-------------|---|
| Email Alert | Email will be sent to admin on every Transaction. |

Time-Dependent Workflow Actions [See an example](#)

SETUP **Workflow Rules**

Workflow Rule **Update Transaction Status** [Help for this Page](#)

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Workflow Rule Detail

| Rule Name | Description | Object | Evaluation Criteria |
|---------------------------|---------------|----------------------------------|--|
| Update Transaction Status | Active | Transaction | Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria |
| | Description | | |
| | Rule Criteria | Property: Sold_Lots > 0 | |
| | Created By | ANIKET KAKADE 9/28/2025, 5:01 AM | Modified By ANIKET KAKADE 9/28/2025, 11:40 AM |

Workflow Actions [Edit](#)

Immediate Workflow Actions

| Type | Description |
|--------------|---------------------------|
| Field Update | Update Transaction Status |

Time-Dependent Workflow Actions [See an example](#)

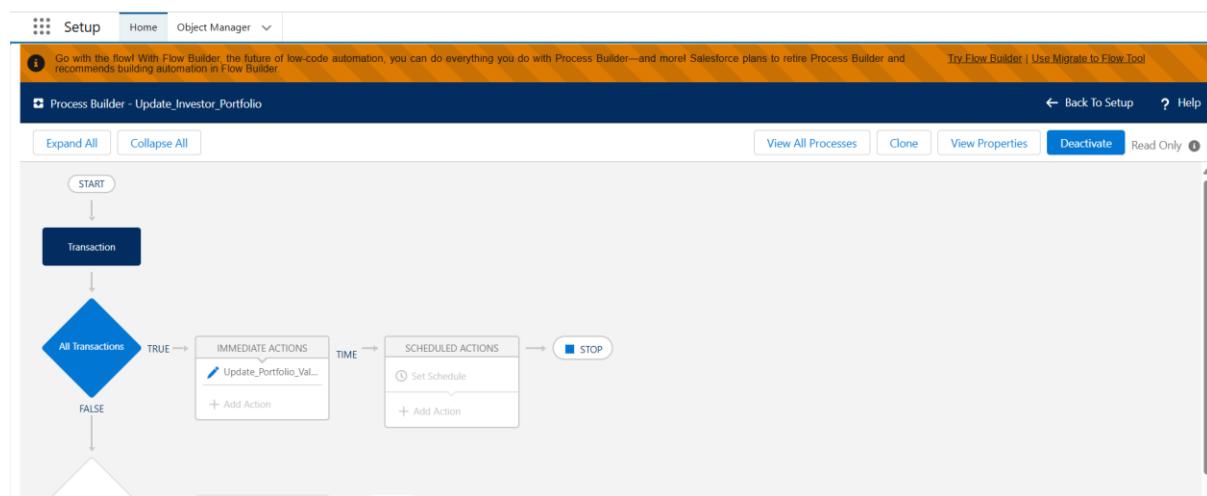
◆ 4.3 Process Builder

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
[Help for this Page](#)

[Back to Approval Process List](#)

| Process Definition Detail | |
|------------------------------------|---|
| Process Name | Withdrawal Approval Process |
| Unique Name | Withdrawal_Approval_Process |
| Description | Next Automated Approver Determined By |
| Entry Criteria | Transaction: Withdrawal Status EQUALS Requested |
| Record Editability | Administrator OR Current Approver |
| 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 [Add Existing](#) [Add New](#)

| Action | Step Number | Name | Description | Criteria | Assigned Approver | Reject Behavior | | | | | | |
|---|-------------|----------------------------------|-------------|----------|-------------------|-----------------|--------|------|-------------|---|-------------|----------------------------------|
| Hide Actions Edit | | | | | | | | | | | | |
| Approval Actions Add Existing Add New <table border="1"> <thead> <tr> <th>Action</th> <th>Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Edit Remove</td> <td>Email Alert</td> <td>Withdrawal Approval Notification</td> </tr> </tbody> </table> | | | | | | | Action | Type | Description | Edit Remove | Email Alert | Withdrawal Approval Notification |
| Action | Type | Description | | | | | | | | | | |
| Edit Remove | Email Alert | Withdrawal Approval Notification | | | | | | | | | | |
| Rejection Actions Add Existing Add New <table border="1"> <thead> <tr> <th>Action</th> <th>Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Edit Remove</td> <td>Email Alert</td> <td>Withdrawal Rejection Action</td> </tr> </tbody> </table> | | | | | | | Action | Type | Description | Edit Remove | Email Alert | Withdrawal Rejection Action |
| Action | Type | Description | | | | | | | | | | |
| Edit Remove | Email Alert | Withdrawal Rejection Action | | | | | | | | | | |

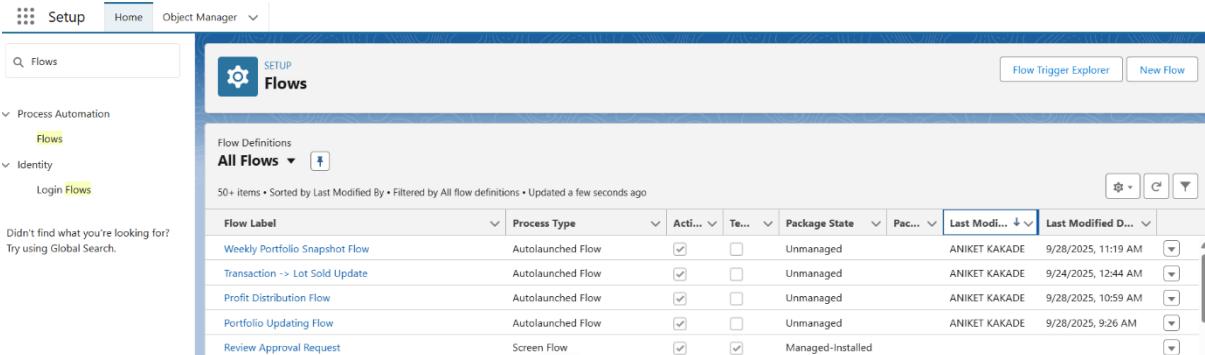
Final Approval Actions [Add Existing](#) [Add New](#)

| Action Type | Description |
|---|-------------|
| Edit Remove | Record Lock |
| Lock the record from being edited | |

◆ 4.5 Record-Triggered Flow

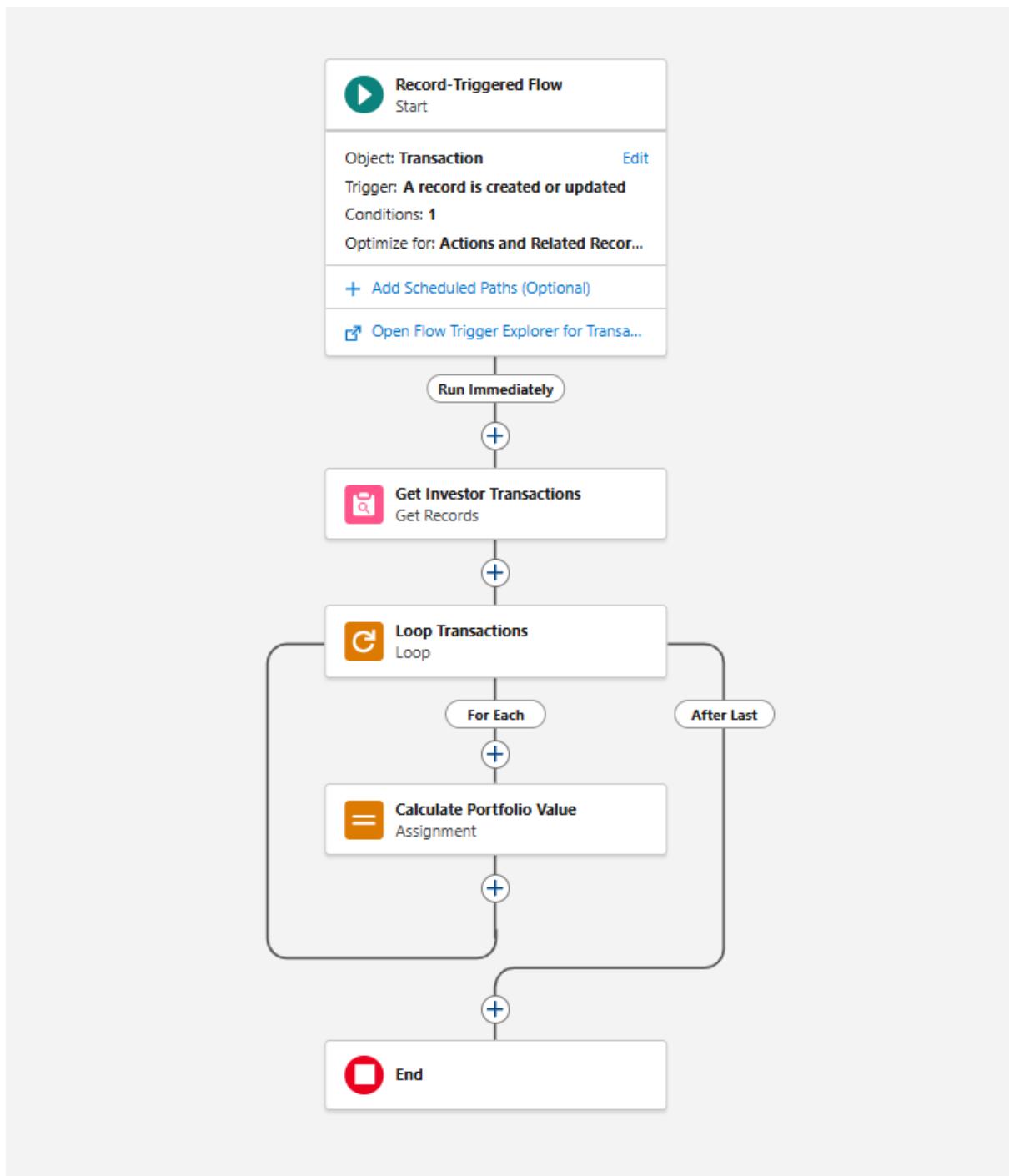
4.5.1 Profit Distribution Flow

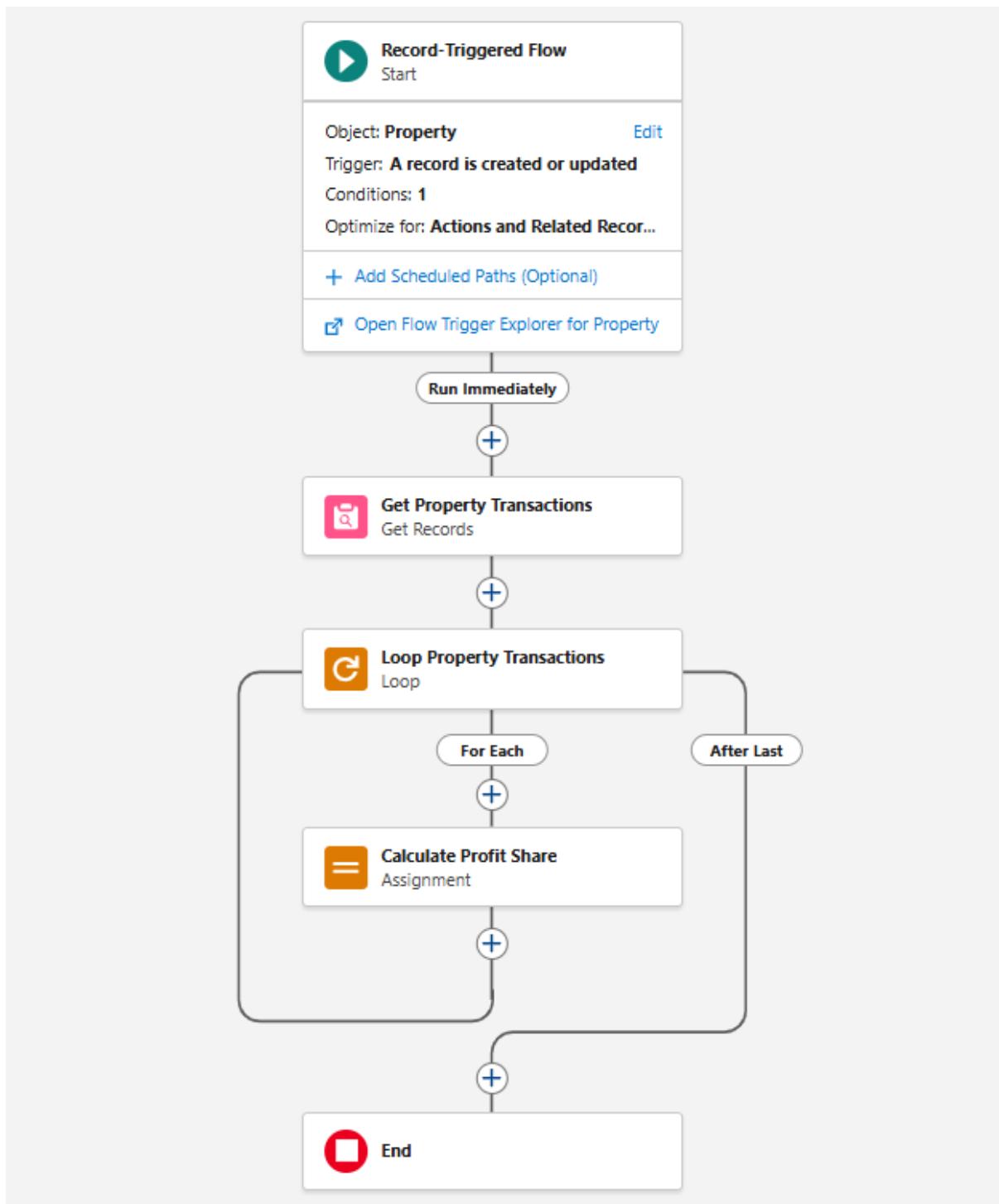
- **Flow Name:** Profit_Distribution_Flow
- **Trigger:** On Property__c (when Profit_Amount__c is updated)
- **Steps:**
 1. **Get Records:** Fetch all Transaction__c linked to Property.
 2. **Loop:** Loop over each Transaction.
 3. **Assignment:**
 4. $\{ !Loop_Transactions.Profit_Share_c \} =$
 $\{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

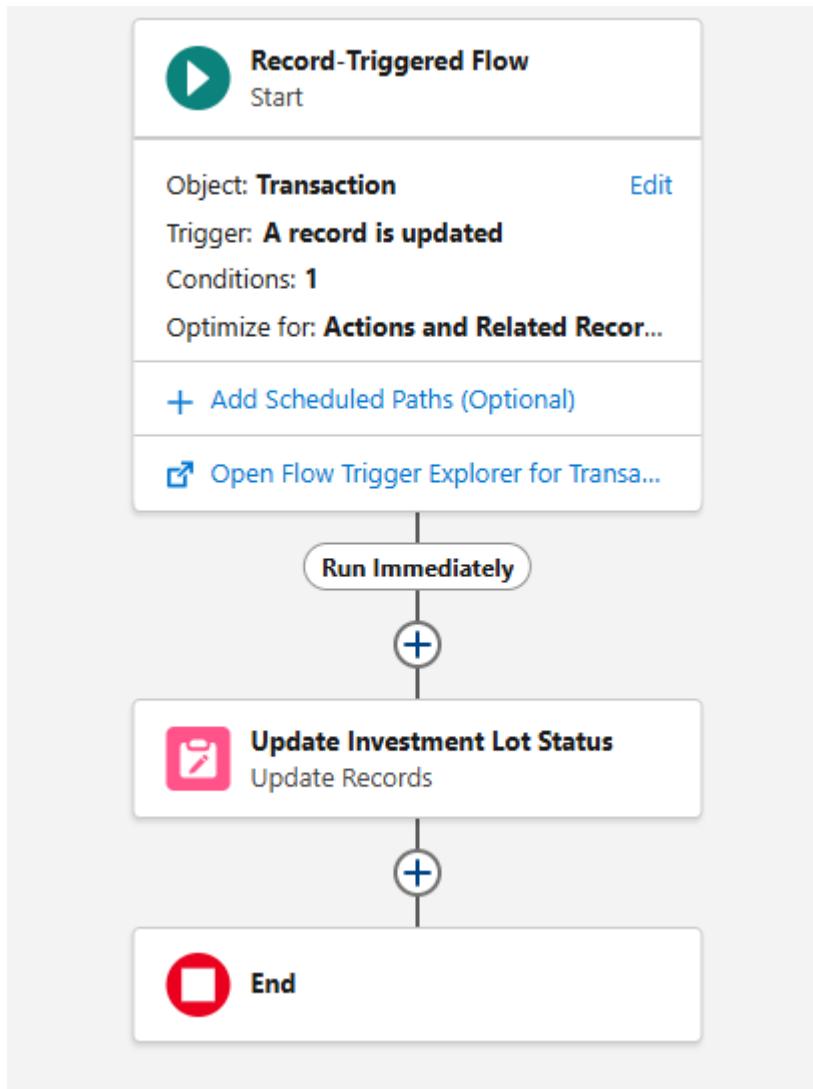


The screenshot shows the Salesforce Setup interface with the 'Flows' tab selected. The main area displays a table of flow definitions. The columns include Flow Label, Process Type, Active, Test, Package State, Package Version, Last Modified Date, and Last Modified By. The table lists five flows: 'Weekly Portfolio Snapshot Flow', 'Transaction -> Lot Sold Update', 'Profit Distribution Flow', 'Portfolio Updating Flow', and 'Review Approval Request'. The 'Profit Distribution Flow' is highlighted with a blue border.

| Flow Label | Process Type | Acti... | Te... | Package State | Pac... | Last Modifi... | Last Modified D... |
|--------------------------------|-------------------|-------------------------------------|-------------------------------------|-------------------|---------------|---------------------|--------------------|
| Weekly Portfolio Snapshot Flow | Autolaunched Flow | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Unmanaged | ANIKET KAKADE | 9/28/2025, 11:19 AM | |
| Transaction -> Lot Sold Update | Autolaunched Flow | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Unmanaged | ANIKET KAKADE | 9/24/2025, 12:44 AM | |
| Profit Distribution Flow | Autolaunched Flow | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Unmanaged | ANIKET KAKADE | 9/28/2025, 10:59 AM | |
| Portfolio Updating Flow | Autolaunched Flow | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Unmanaged | ANIKET KAKADE | 9/28/2025, 9:26 AM | |
| Review Approval Request | Screen Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed | | | |





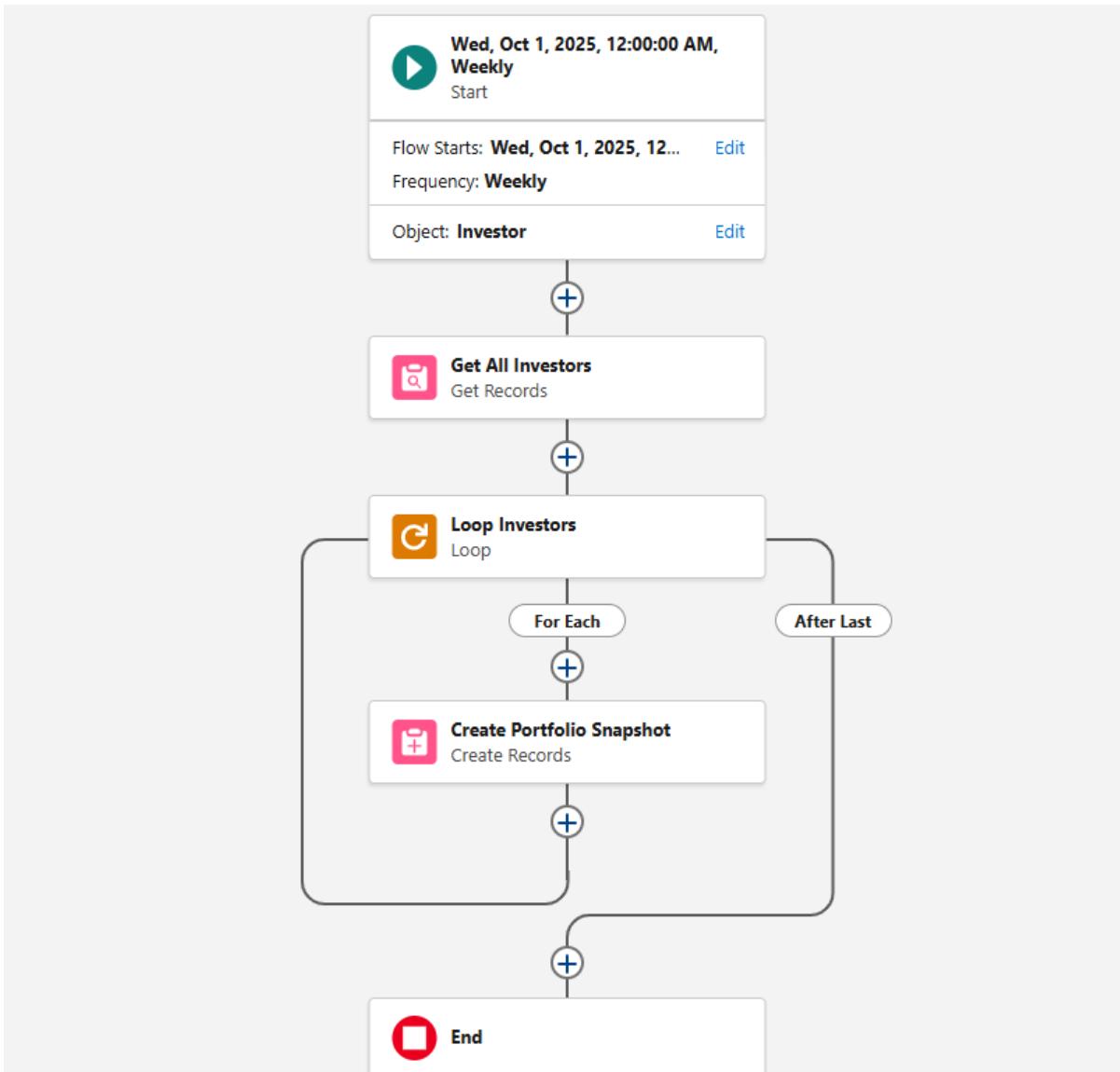


◆ 4.6 Scheduled Flow

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.

The screenshot shows the 'Email Alerts' page in a CRM system. At the top, there's a 'SETUP' button and a 'Email Alerts' section. Below that, it says 'All Email Alerts' and 'Help for this Page'. There's a 'View' dropdown set to 'All Email Alerts' and a 'Create New View' link. A navigation bar at the bottom includes links for A through Z and an 'All' link.

| Action | Description | Email Template Name | Object | Last Modified Date |
|------------|---|----------------------------------|-------------|--------------------|
| Edit Del | Email will be sent to admin on every Transaction. | Transaction Alert for Admin | Transaction | 9/28/2025 |
| Edit Del | Withdrawal Approval Notification | Withdrawal_Approved_Notification | Transaction | 9/28/2025 |
| Edit Del | Withdrawal Rejection Action | Withdrawal_Rejected_Email | Transaction | 9/28/2025 |

✓ 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 **Reva**a.