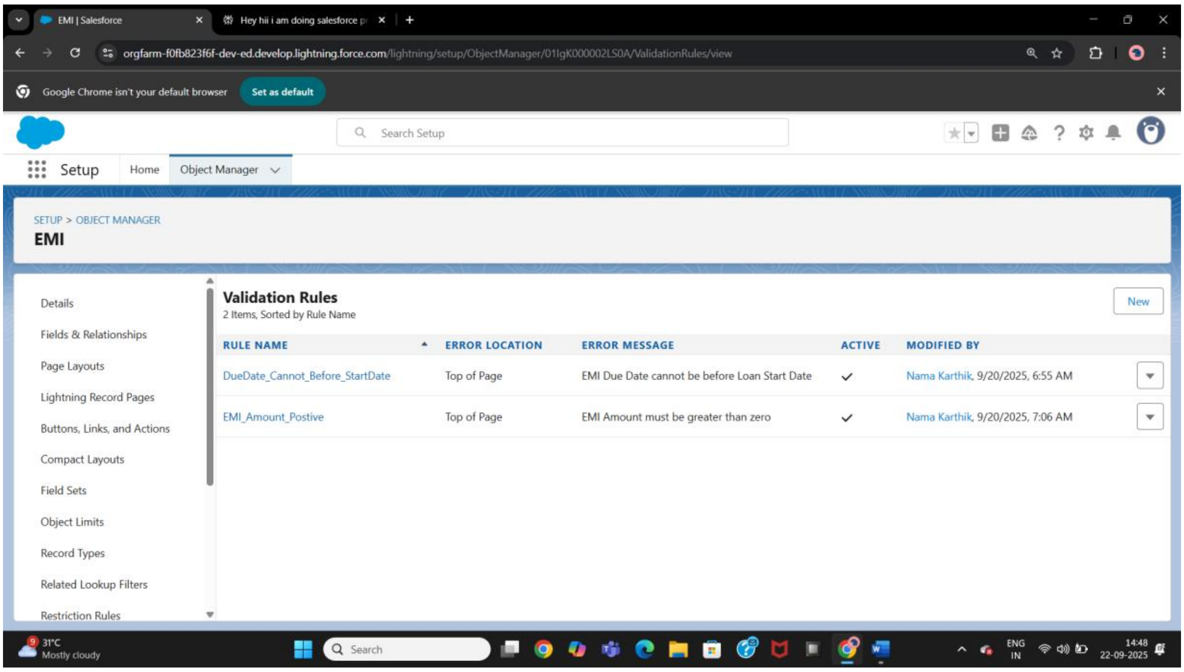
LoanEase: Salesforce Loan Management CRM

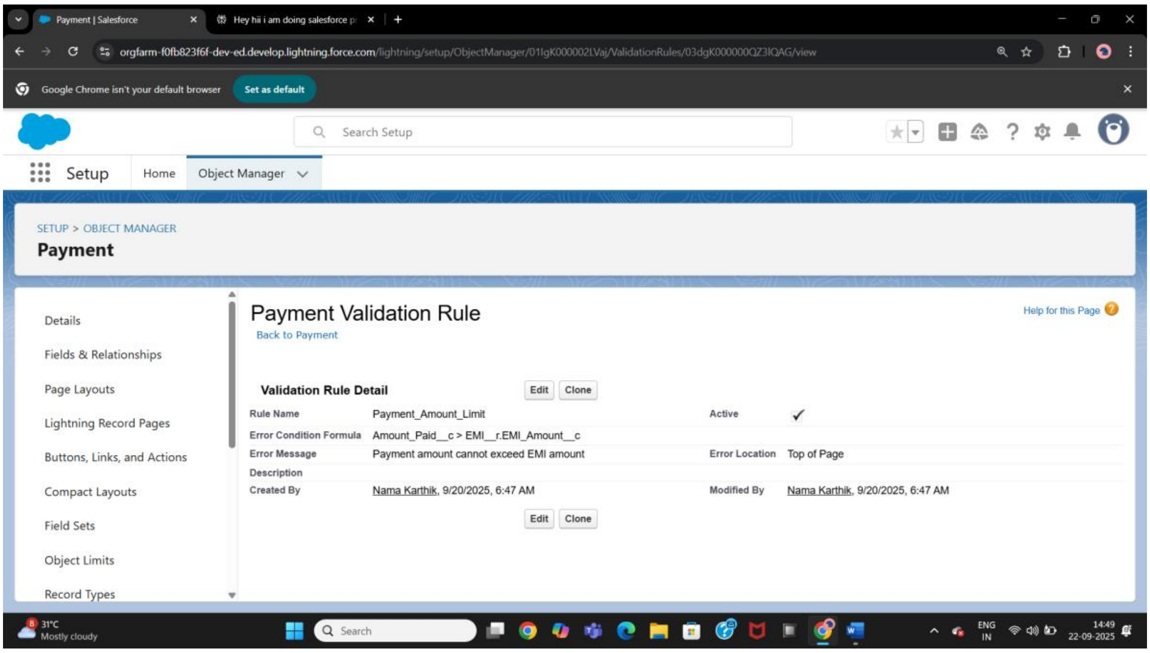
Phase 4: Process Automation (Admin)

Validation Rules

In this EMI-Payment project, the following validation rules were created to ensure data quality and business logic integrity:

- **EMI Amount Validation**
  - Ensures that the EMI Amount is always a positive value and not zero or negative.
  - Prevents saving records with invalid financial amounts.
  - Example condition (formula):
    EMI_Amount__c <= 0
    Error message: "EMI Amount must be greater than zero."
- **EMI Due Date Validation**
  - Ensures that EMI Due Date is not set in the past during creation or update.
  - Helps to prevent incorrect due date entries impacting payment scheduling.
  - Example condition:
    EMI_Due_Date__c < TODAY()
    Error message: "EMI Due Date cannot be in the past."
- **Payment Amount Validation**
  - Validates Payment Amount Paid is <= EMI Amount (to avoid overpayments).
  - Ensures Payment Status is filled in required scenarios.
  - Example:
    Check Payment Amount <= EMI Amount referenced by lookup in Payment record.
- **Status Field Checks**
  - Enforces acceptable status values for EMI Status and Payment Status fields.
  - Prevents invalid or missing status from proceeding downstream workflows or reports.

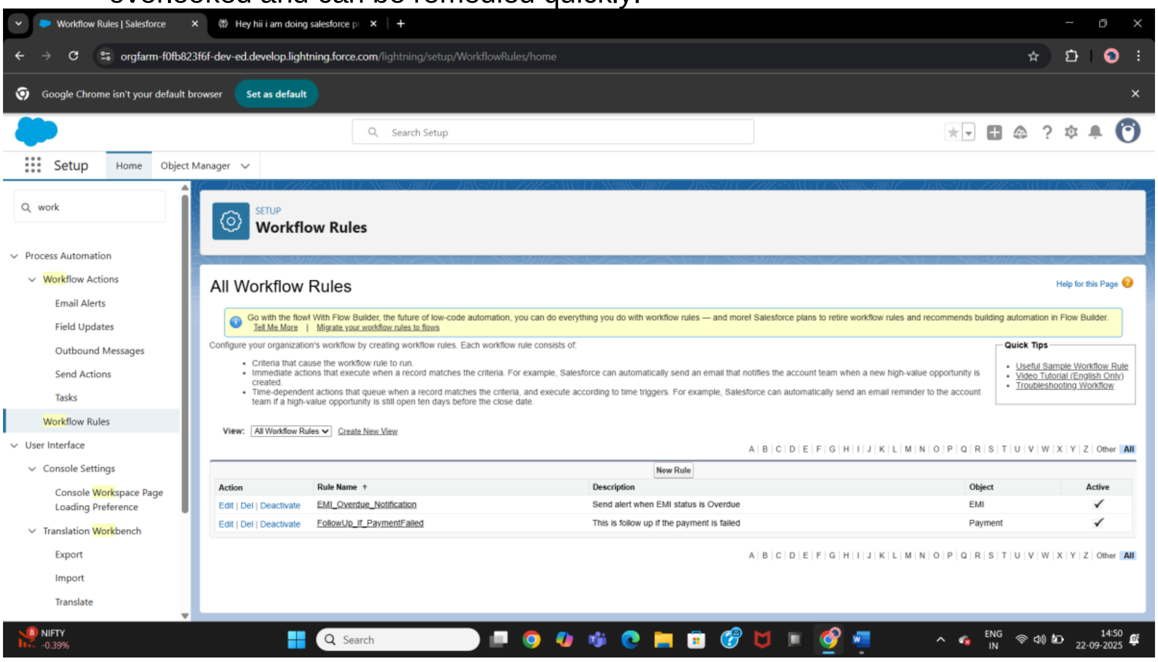




Workflow rules

As part of the automation in this project, the following workflow rules were created to provide automated responses to key business events involving EMI and Payment records.

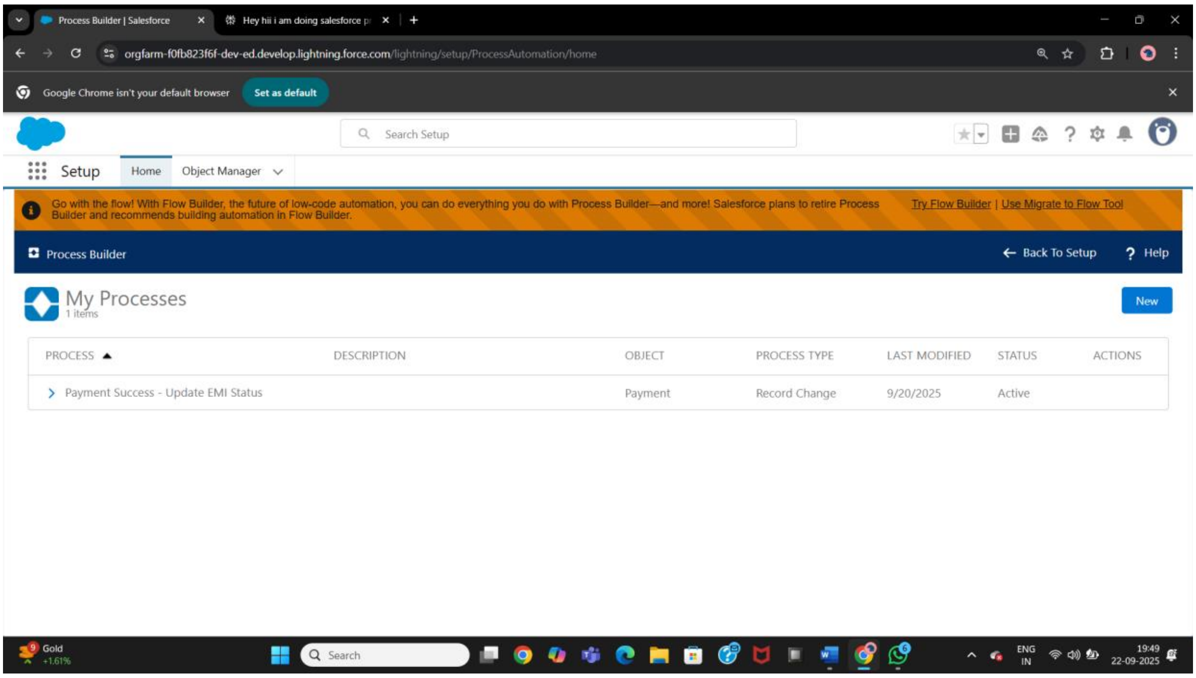
- **EMI Overdue Notification**
  - Customer Name (Text): Name of the loan applicant.
  - Rule Name: EMI_Overdue_Notification
  - Object: EMI
  - Description: Sends an alert whenever the EMI status is set to "Overdue".
  - Action: Triggers an email alert to notify users about overdue EMI installments and ensures stakeholders are instantly informed if payments are not made on time.
- **Follow Up If Payment Failed**
  - Rule Name: FollowUp_If_PaymentFailed
  - Object: Payment
  - Description: Issues a follow-up action whenever a payment record is marked as "Failed".
  - Action: Triggers internal reminders or follow-up steps so payment failures are not overlooked and can be remedied quickly.



Process Builder

As part of EMI automation, Process Builder was used to create a process on the Payment object that automates EMI status updates when payments are completed

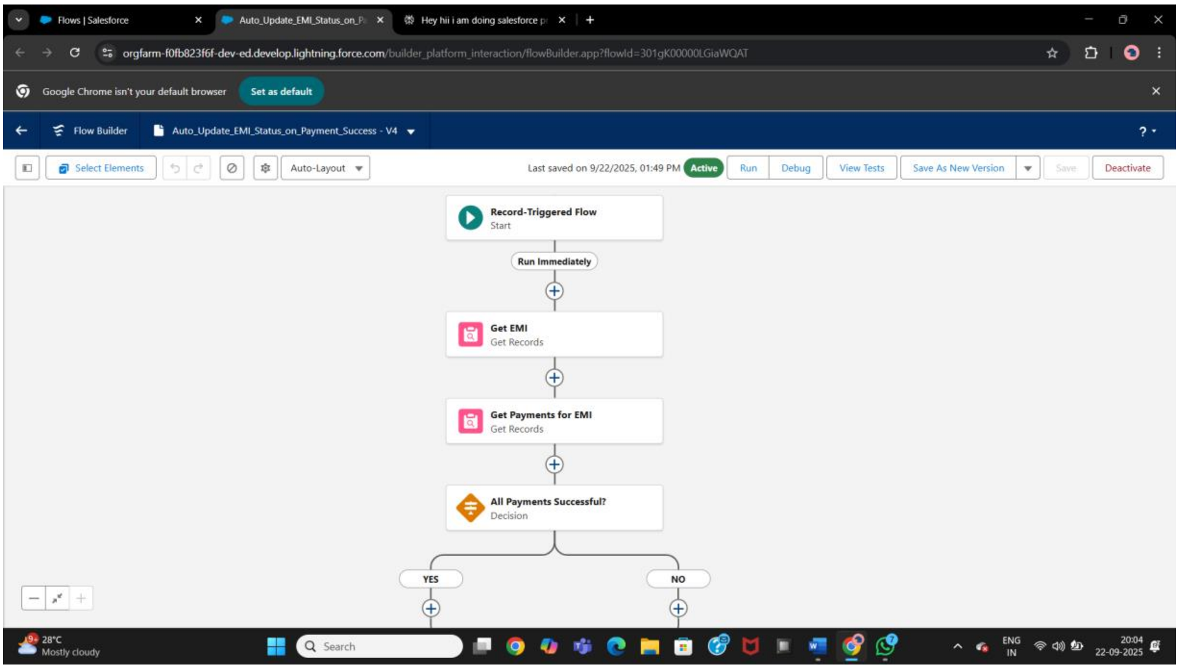
- **Process Details**
  - Process Name: Payment Success - Update EMI Status
  - Object: Payment
  - Process Type: Record Change
  - Last Modified: 9/20/2025
  - Status: Active
- **Purpose and Logic**
  - Trigger: This process launches whenever a Payment record is created or updated.
  - Criteria: Checks if the Payment status indicates success.
  - Action: When a payment is successful, it updates the related EMI record’s status automatically (typically to Paid or Completed).
  - Advantage: Ensures EMI status is always accurate and eliminates the need for manual record updates.

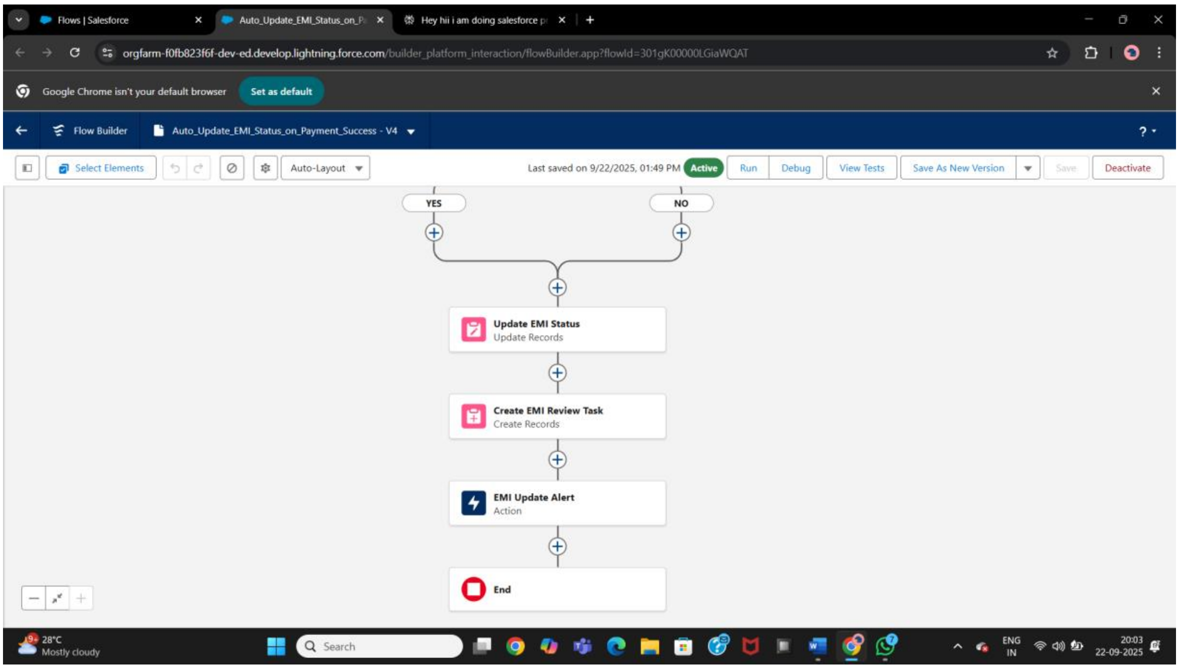


Flow Builder

The Flow Builder is leveraged for record-triggered automation to ensure real-time updates of EMI status based on changes in related Payment records.

- **Flow Type**
  - Action: Triggers an email alert to notify users about overdue EMI installments and ensures stakeholders are instantly informed if payments are not made on time. Record-Triggered Flow on the Payment object.
  - Triggered when a payment is created or updated to the status of "Success."
- **Flow Logic Highlights**
  - Get Records: Fetches the related EMI record linked to the Payment.
  - Get Payments for EMI: Fetches all Payment records related to the EMI to check their statuses.
  - Decision Element: Checks if all related Payments have a Successful status.
  - Update Records: If all payments are successful, updates the EMI status field to indicate payment completion.
  - The flow improves accuracy and reduces manual intervention in EMI payment tracking.
- **Flow Features**
  - The flow improves accuracy and reduces manual intervention in EMI payment tracking. Uses decision logic to handle complex multiple payment scenarios.
  - Automates EMI record updates without code.
  - Can be extended with fault paths, notifications, or task automation.

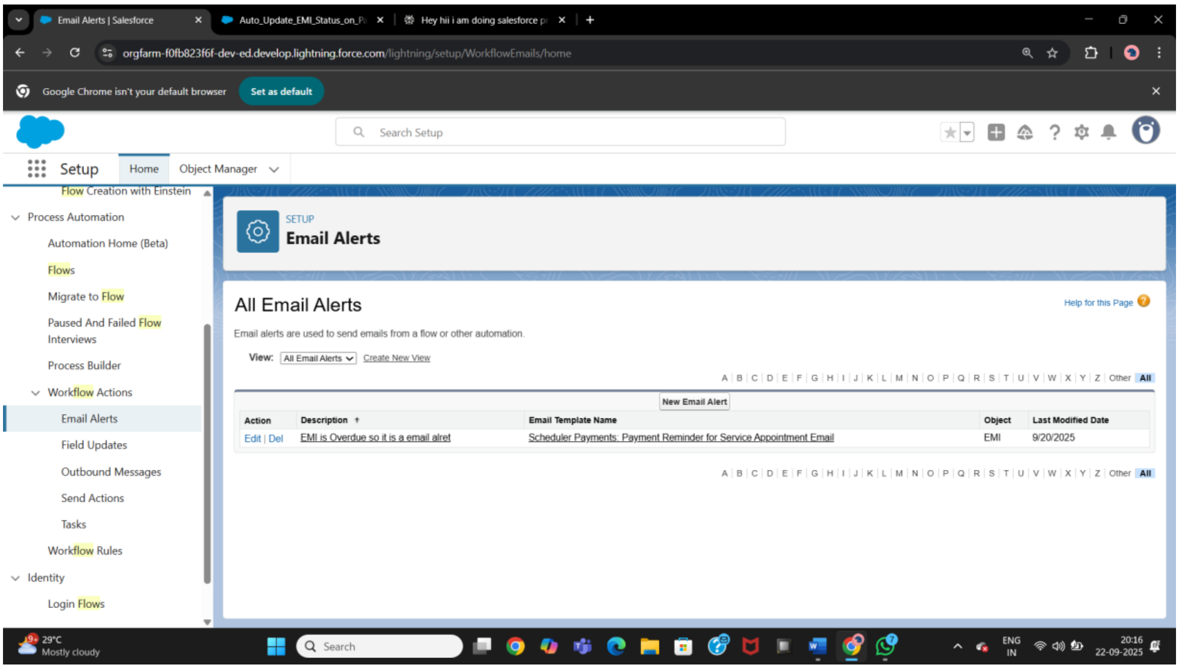




Email Alerts

Email Alerts are configured in Salesforce to send automated notification emails when certain EMI or Payment conditions are met. This ensures users and stakeholders are promptly informed about critical updates—like overdue payments—without manual intervention.

- **Setup in This Project**
  - Alert Name: EMI is Overdue so it is a email alert
  - Email Template Used: Scheduler Payments: Payment Reminder for Service Appointment Email
  - Object: EMI
  - Purpose: Whenever the EMI status becomes "Overdue," an automated email is sent to notify responsible parties or customers about the overdue payment.
  - Integration: This Email Alert can be invoked from Workflow Rules, Process Builder, or Flows as needed.
- **Benefits**
  - Ensures timely reminders for overdue or critical EMI payment cases.
  - Reduces risk of missed communications and improves collection efficiency.
  - Integrates seamlessly into Salesforce process automation



Field Updates

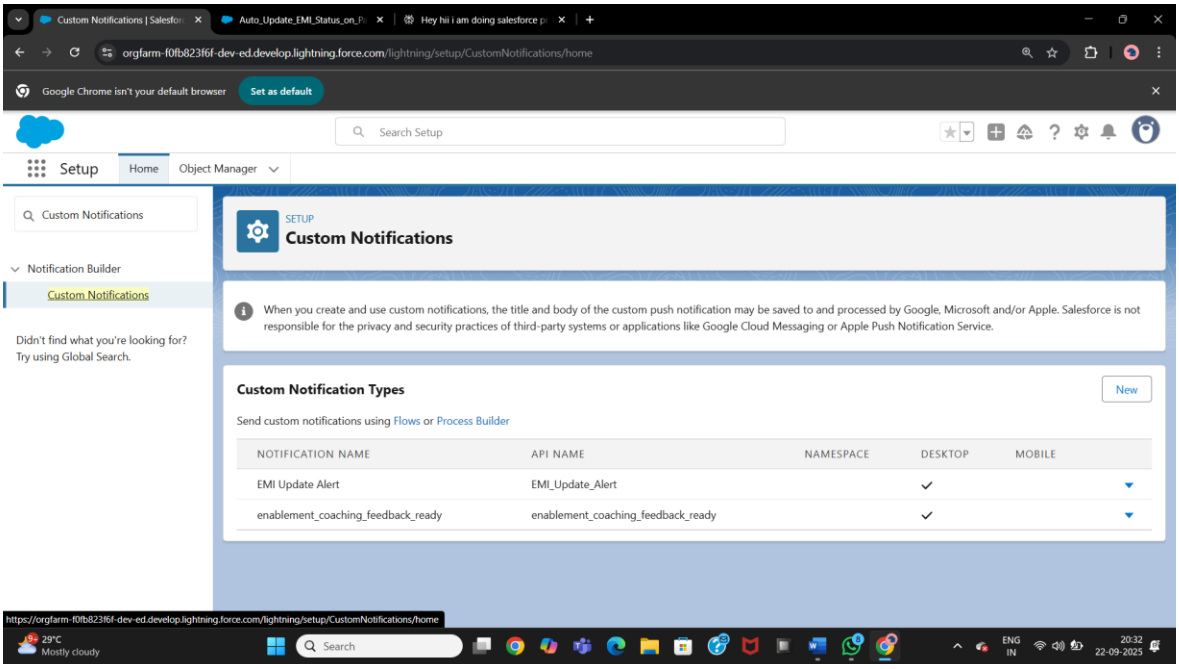
- Automated updating of EMI status field based on payment outcomes.
- Implemented within Flow Builder to auto-update EMI status when all related payments are successful.
- Ensures EMI records always reflect accurate payment status without manual changes.
- Reduces errors and improves data consistency across payment records and EMIs.
- Acts as a key step in the payment-to-EMI status synchronization automation flow.

Tasks Automation

- Automated Task creation is integrated within the Flow Builder process.
- Tasks are automatically generated when specific EMI status changes occur, signaling the need for user follow-up.
- Task fields such as Subject, Status, Priority, Due Date, and Owner are predefined in the automation.
- This ensures timely action and accountability for EMI-related activities.
- Helps users track overdue or problem payments through Salesforce task management interface.

Custom Notifications

- Configured Custom Notifications to alert users instantly within Salesforce UI and mobile app.
- Notifications trigger on important EMI payment status changes (e.g., payment completion).
- Recipient IDs are dynamically assigned based on Payment record ownership.
- Provides real-time, actionable awareness without relying solely on emails.
- Enhances user engagement by leveraging Salesforce in-app and push notification features.


Custom Notifications | Salesforce
Auto_Update_EMI_Status_on_P
Hey hii i am doing salesforce p
orgfarm-f0fb823f6f-dev-ed.develop.lightning.force.com/lightning/setup/CustomNotifications/home
Google Chrome isn't your default browser
Set as default
Search Setup
Setup
Home
Object Manager
Custom Notifications
Notification Builder
Custom Notifications
Didn't find what you're looking for? Try using Global Search.
SETUP
Custom Notifications
When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.
Custom Notification Types
New
Send custom notifications using Flows or Process Builder
NOTIFICATION NAME
API NAME
NAMESPACE
DESKTOP
MOBILE
EMI Update Alert
EMI_Update_Alert
enablement_coaching_feedback_ready
enablement_coaching_feedback_ready
https://orgfarm-f0fb823f6f-dev-ed.develop.lightning.force.com/lightning/setup/CustomNotifications/home
29°C
Mostly cloudy
Search
ENG
IN
20:32
22-09-2025