

FinSmart CRM Project – Phase 4:

Validation Rules, Scheduled Flow, and Approval Process


1. Validation Rule — Loan Amount > 0








What I did: I created a validation rule on Loan_Application__c object to ensure that Loan Amount is always greater than 0.

- Rule Name: LoanAmount_Positive
- Formula: Loan_Amount__c <= 0
- Error Message: Loan amount must be greater than 0.
- Error Location: Loan_Amount__c field.

Reason: This prevents users from entering zero or negative loan amounts, which are invalid in real-world banking operations.

Testing: Tried creating a Loan with Loan_Amount__c = 0 → System displayed the error message.






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Object Manager

 **Object Manager**

Loan_Application Validation Rule

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Validation Rule Detail

Edit

Clone

Rule Name	LoanAmount_Positive	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Loan_Amount__c <= 0		
Error Message	Loan amount must be greater than 0	Error Location	Loan_Amount
Description			
Created By	Shrinidhi Shrinidhi, 9/23/2025, 6:04 AM		Modified By Shrinidhi Shrinidhi, 9/23/2025, 6:04 AM

Edit

Clone

2. Scheduled Flow — EMI Reminder Emails

What I did: I built a Schedule-Triggered Flow to send EMI reminder emails to customers 3 days before due date.

Steps:

1. Created an Email Template named Loan Repayment Reminder.

The screenshot shows the Salesforce Email Template Builder interface for a template named "Loan Repayment Reminder". The interface includes a top navigation bar with a search bar and various menu items like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, and a tab for "Loan Repayment Reminder". Below the navigation bar, there are buttons for "Edit", "Clone", and "Delete". The main content area is divided into two sections: "Information" and "Message Content".

Information Section:

Email Template Name	Loan Repayment Reminder	Related Entity Type	Repayment
Description	emplate for sending EMI due reminders to customers 3 days before repayment date	Folder	Loan Notifications
Made in Email Template Builder	<input type="checkbox"/>		

Message Content Section:

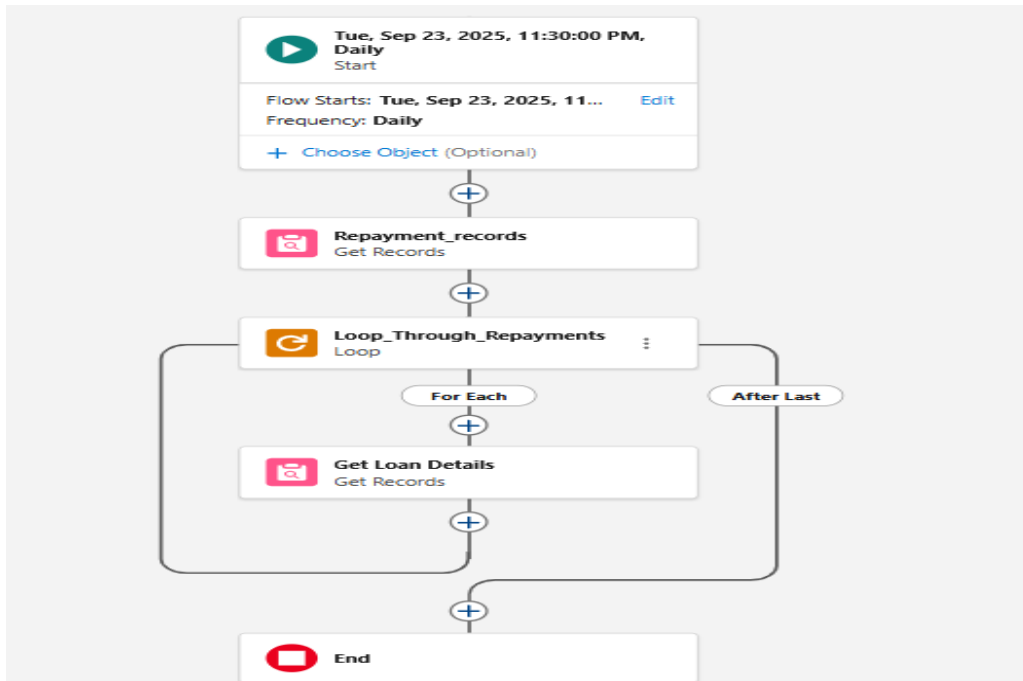
Subject	FinSmart: EMI reminder for Loan {{RelatedTo.Loan__r.Name}}	Enhanced Letterhead	
HTML Value	Hello {{RelatedTo.Loan__r.Customer__r.Name}}, This is a reminder that your EMI of {{RelatedTo.Due_Amount__c}} is due on {{RelatedTo.Due_Date__c}} for Loan {{RelatedTo.Loan__r.Name}}. Please pay on time to avoid penalties. Thanks, FinSmart Bank		

2. Built a Scheduled Flow:

- Frequency: Daily
- Formula Resource: $\text{targetDate} = \$\text{Flow.CurrentDate} + 3$
- Get Records: Repayment__c where Due_Date__c = targetDate and Payment_Status__c = 'Due'
- Loop through records and send email using Send Email action.

Reason: This ensures that customers are reminded about their EMI payments on time, reducing the chance of defaults and penalties.

Testing: For testing, I set $\text{targetDate} = \$\text{Flow.CurrentDate} + 0$. Emails successfully triggered to test records.



3. Approval Process — High Value Loan Approvals


What I did: I created an Approval Process for Loan Applications where Loan Amount is $\geq 1,000,000$.

Steps:

1. Object: Loan_Application__c
2. Entry Criteria: Loan_Amount__c ≥ 1000000
3. Approver: Manager of the Loan Owner (or specified role)
4. Initial Submission Action:
 - Field Update: Loan_Status__c = 'Under_Review'
 - Optional: Email alert to approver
5. Approval Steps: Approver reviews and approves/rejects
6. Final Approval Actions:
 - Field Update: Loan_Status__c = 'Approved'
 - Optional: Notification to submitter
 - Trigger repayment creation process (via flow)
7. Final Rejection Actions:
 - Field Update: Loan_Status__c = 'Rejected'
 - Email notification to applicant

Reason: This ensures that high-value loans go through a manager's approval before being processed, adding control and reducing risk.

Testing: Created a loan with Loan_Amount__c = 1,200,000. Submitted for Approval → Manager received request → Approved → Loan_Status__c updated to 'Approved'.



Setup

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Object Manager ▾

Data

Mass Transfer **Approval** Requests

Feature Settings

Approval Settings

Process Automation

Approval Processes

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SETUP

Approval Processes

 Approval Processes

Loan_Application: Loan Approval > 1M

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Process Definition Detail

Edit ▾
 Clone
 Delete
 Activate

Process Name	Loan Approval > 1M	Active	<input type="checkbox"/>	Approval Processes: Loan_Ag
Unique Name	Loan_Approval_1M	Next Automated Approver Determined By	Manager of Record Submitter	
Description				
Entry Criteria	Loan_Application: Loan_Amount GREATER OR EQUAL 1000000			
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>	
Approval Assignment Email Template	Approval Email			
Initial Submitters	Role: Loan Officer			
Created By	Shrinidhi Shrinidhi , 9/24/2025, 12:14 AM		Modified By	Shrinidhi Shrinidhi , 9/24/2025, 12:19 AM

Initial Submission Actions

Add Existing
 Add New ▾

Action	Type	Description
	Record Lock	Lock the record from being edited

Summary

- Validation Rule ensures data accuracy (Loan Amount > 0).
- Scheduled Flow ensures timely communication (EMI reminders).
- Approval Process ensures governance and risk control for high-value loans.