Phase 4: Process Automation (Admin)

Objective: To implement the core business logic and automated workflows using declarative tools.

Key Activities & Outcomes:

1. **Validation Rules: Two rules were created to ensure data integrity:**

    o **Check_Minimum_Salary: Enforces a minimum annual salary.**

    o **Check_Credit_Score: Enforces a minimum credit score.**

2. **Queues: Two queues were created to manage team-based assignments: Credit Officers and Loan Managers.**

3. **Approval Process: A multi-step approval process was built on the Loan Application object. It automatically locks the record on submission and routes it first to the Credit Officers and then to the Loan Managers for final approval.**

4. **Record-Triggered Flow: A flow was created that automatically creates a "Disbursal Task" for the loan owner the moment the Status is updated to "Approved."**

Supporting Evidence: Approval Process & Flow Canvas