Phase 4: Process Automation (Admin)

In this phase, we focused on implementing **automation and validation** in Salesforce to ensure clean data entry, streamline record updates, and prepare the system for reporting.

1- Validation Rules

Investment Amount must be greater than 0



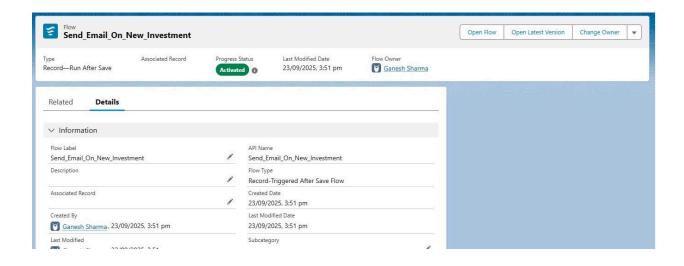
2- Approval Process

High Investment (> ₹1,00,000) requires Finance Manager approval



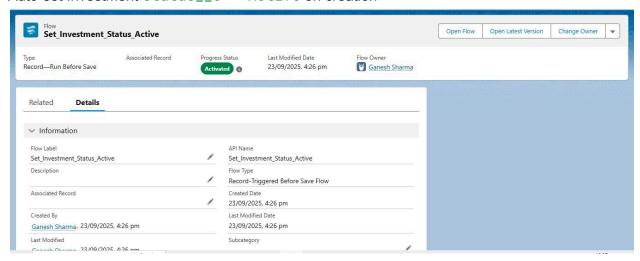
3 - Email Alerts

· Email notification to Investor when new Investment is recorded



4 - Field Update

Auto-set Investment Status__c = Active on creation



Outcome

- Data is clean & validated.
- High-value Investments are controlled via approvals.
- Investors get automatic email alerts.
- Status fields are **auto-updated**, reducing manual effort.