

# 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

SETUP > OBJECT MANAGER

### Investment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

#### Investment Validation Rule

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**Validation Rule Detail** [Edit](#) [Clone](#)

Rule Name	INV_Amount_Positive	Active	<input checked="" type="checkbox"/>
Error Condition Formula	OR( ISBLANK(Amount__c), Amount__c <= 0 )		
Error Message	Investment amount must be greater than 0	Error Location	Amount__c
Description			
Created By	Ganesh Sharma, 25/09/2025, 6:15 pm	Modified By	Ganesh Sharma, 25/09/2025, 6:29 pm

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## 2- Approval Process

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

Approval Processes

### Investment: High\_Investment\_Approval

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**Process Definition Detail** [Edit](#) [Clone](#) [Delete](#) [Activate](#)

Process Name	High_Investment_Approval	Active	<input checked="" type="checkbox"/>
Unique Name	High_Investment_Approval	Next Automated Approver Determined By	
Description			
Entry Criteria	Purchase_Value__c > 100000		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Investment Owner		
Created By	Ganesh Sharma, 23/09/2025, 2:57 pm	Modified By	Ganesh Sharma, 23/09/2025, 2:57 pm

### 3 - Email Alerts

- Email notification to Investor when new Investment is recorded

The screenshot shows the configuration page for a flow named "Send\_Email\_On\_New\_Investment". The flow is activated and was last modified on 23/09/2025 at 3:51 pm by Ganesh Sharma. The flow type is "Record—Run After Save". The details section shows the following information:

Information	
Flow Label	Send_Email_On_New_Investment
Description	
Associated Record	
Created By	Ganesh Sharma, 23/09/2025, 3:51 pm
Last Modified	23/09/2025, 3:51 pm
API Name	Send_Email_On_New_Investment
Flow Type	Record-Triggered After Save Flow
Created Date	23/09/2025, 3:51 pm
Last Modified Date	23/09/2025, 3:51 pm
Subcategory	

### 4 - Field Update

Auto-set Investment **Status\_\_c = Active** on creation

The screenshot shows the configuration page for a flow named "Set\_Investment\_Status\_Active". The flow is activated and was last modified on 23/09/2025 at 4:26 pm by Ganesh Sharma. The flow type is "Record—Run Before Save". The details section shows the following information:

Information	
Flow Label	Set_Investment_Status_Active
Description	
Associated Record	
Created By	Ganesh Sharma, 23/09/2025, 4:26 pm
Last Modified	23/09/2025, 4:26 pm
API Name	Set_Investment_Status_Active
Flow Type	Record-Triggered Before Save Flow
Created Date	23/09/2025, 4:26 pm
Last Modified Date	23/09/2025, 4:26 pm
Subcategory	

## 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.