

Phase 4: Process Automation (Admin)

1. 1. Validation Rules

Use Case:

To ensure data accuracy while submitting a loan application, we created a validation rule that checks whether the **Loan Amount** entered is greater than the applicant's **Income**. If it is, the system prevents record saving and displays an error message.

Logic:

Loan_Amount__c > Income__c

Validation Rules

2 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Income_Required_HighLoan	Top of Page	Applicant Income is required for loans above ₹ 5 lakh	✓	komal kumar, 06/11/2025, 2:05 pm
Loan_Amount_Positive	Top of Page	Loan Amount must be greater than zero.	✓	komal kumar, 06/11/2025, 2:03 pm

2.Approval Process

◆ Use Case:

Every loan application must go through an **approval workflow** by a Loan Officer before it's finalized.

Steps:

1. Applicant submits a Loan Application.
2. The record enters the approval queue.
3. The assigned **Loan Officer** receives an approval request.
4. On approval → Loan_Status__c = "Approved."
5. On rejection → Loan_Status__c = "Rejected."

Name	Set Status to Approved
Unique Name	Set_Status_to_Approved ⓘ
Description	
Object	Loan Application
Field to Update	Loan Application: Status
Field Data Type	Picklist
Rules after Field Change	<input type="checkbox"/> ⓘ

Value

Picklist Options
☐ The value above the current one
☐ The value below the current one
☒ A specific value

3.Flow Builder

Flows are the most powerful part of automation. Several types are used in this project:

Screen Flow: EMI Calculator

Use Case:

We used a **Screen Flow** to calculate the monthly EMI based on:

Loan Amount

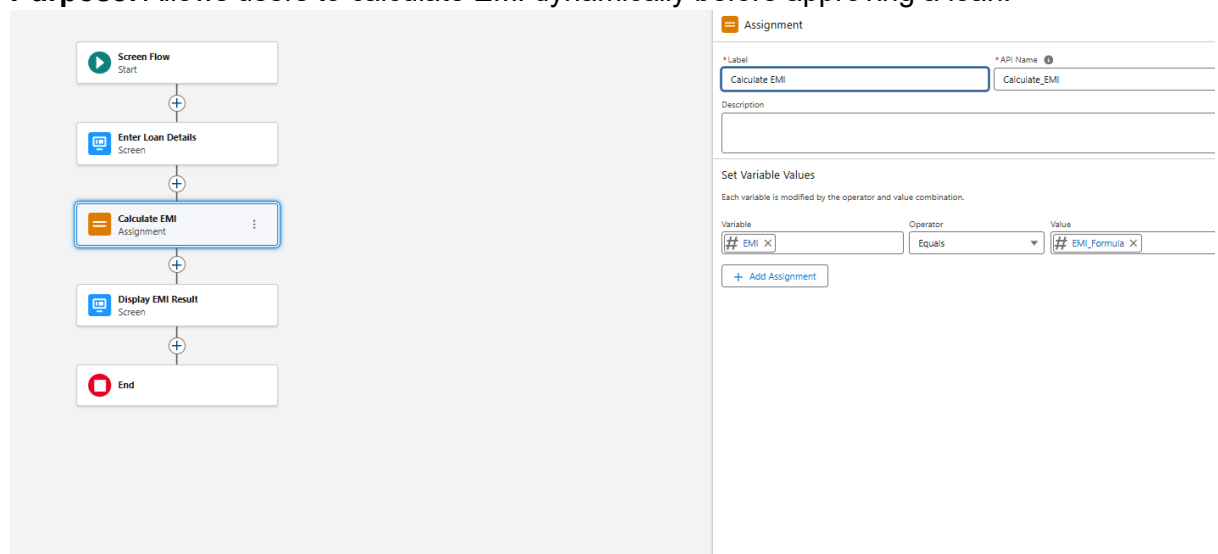
Interest Rate

Tenure

Logic:

$$EMI = [P \times R \times (1 + R)^N] / [(1 + R)^N - 1]$$

Purpose: Allows users to calculate EMI dynamically before approving a loan.



Email Alerts:-

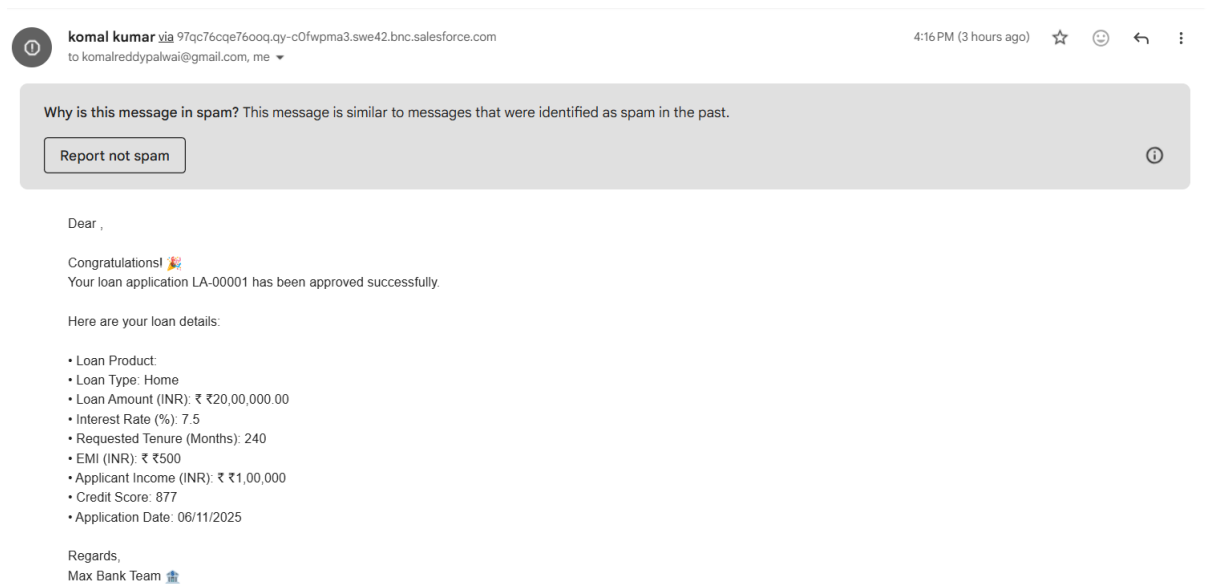
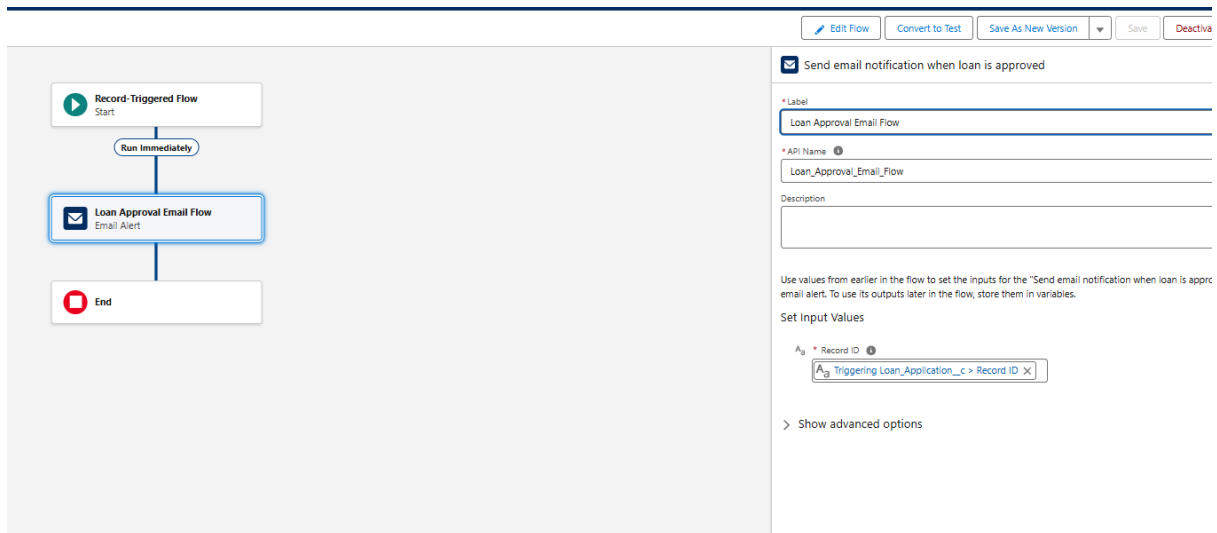
Use Case:

Automatically send an email when:

- Loan Application is Approved → "Loan Approval Notification"
- Loan Application is Rejected → "Loan Rejection Notice"

Components:

- Email Template (HTML)
- Workflow Rule / Process Builder Trigger
- Recipient: Applicant Email (Contact.Email)



Phase 4 Summary: Process Automation (Admin)

In this phase, we implemented various **Salesforce automation tools** to streamline and optimize the **loan origination and approval process**. These automations ensure data accuracy, reduce manual effort, and enable a smooth end-to-end workflow from loan submission to approval and notification.