

“Government Schemes Management System”

Phase 4: Process Automation (Admin)

Validation Rules

Goal: Ensure data integrity and prevent invalid entries in Scheme Applications.

Rules Created:

1. Requested_Amount_Validation

- **Object:** Scheme Application
- **Field:** Requested Amount
- **Formula:** Prevents Requested Amount from exceeding Approved Amount.
- **Error Message:** "Requested Amount cannot be greater than Approved Amount."
- **Active:** Yes

2. Submission_Date_Validation

- **Object:** Scheme Application
- **Field:** Submission Date
- **Formula:** Prevents users from entering a future date.
- **Error Message:** "Submission Date cannot be in the future."
- **Active:** Yes

Impact:

- Prevents invalid amounts or future submission dates.
- Improves data accuracy and reporting reliability.

Scheme Application Validation Rule

[Back to Scheme Application](#)

Validation Rule Detail				<div>EditClone</div>	
Rule Name	Requested_Amount_Validation		Active	<input checked="" type="checkbox"/>	
Error Condition Formula	Requested_Amount__c > Approved_Amount__c				
Error Message	*Requested Amount cannot be greater than Approved Amount		Error Location	Top of Page	
Description					
Created By	Anala Lasya, 9/28/2025, 11:24 AM		Modified By	Anala Lasya, 9/28/2025, 11:24 AM	
			<div>EditClone</div>		

Scheme Application Validation Rule

[Back to Scheme Application](#)

Validation Rule Detail				<div>EditClone</div>	
Rule Name	Submission_Date_Validation		Active	✓	
Error Condition Formula	Submission_Date__c > TODAY()				
Error Message	Submission Date cannot be in the future		Error Location	Top of Page	
Description					
Created By	Anala Lasya, 9/28/2025, 11:26 AM		Modified By	Anala Lasya, 9/28/2025, 11:26 AM	
			<div>EditClone</div>		

Workflow Rules / Field Updates

Goal: Automate key field updates and notifications.

Workflow Rules Implemented:

- 1. Auto Email on Submitted**
 - **Object:** Scheme Application
 - **Action:** Sends email to Officer when a new Scheme Application is submitted.
 - **Active:** Yes
- 2. Set_Stage_In_Review**
 - **Object:** Scheme Application
 - **Action:** Updates Stage__c to "In Review" when Status = Submitted.
 - **Active:** Yes

Impact:

- Officers automatically receive emails for new applications.

- Submitted applications are clearly marked as "In Review".

Workflow Rule
Auto Email on Submitted Help for this Page

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail Edit Clone Deactivate

Rule Name	Auto Email on Submitted	Object	Scheme Application
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	Sends email to Officer when a new Scheme Application is submitted.		
Rule Criteria	Scheme Application: Status EQUALS Submitted		
Created By	Anala Lasva, 9/28/2025, 11:38 AM	Modified By	Anala Lasva, 9/28/2025, 11:40 AM

Workflow Rule
Set Stage_In_Review Help for this Page

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Workflow Rule Detail Edit Clone Deactivate

Rule Name	Set Stage_In_Review	Object	Scheme Application
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description	Updates Stage__c to "In Review" when Status = Submitted		
Rule Criteria	Scheme Application: Status EQUALS Submitted		
Created By	Anala Lasva, 9/28/2025, 11:42 AM	Modified By	Anala Lasva, 9/28/2025, 11:43 AM

Workflow Actions Edit

Immediate Workflow Actions

Type	Description
Field Update	Update Set Stage_In_Review

Record-Triggered Flow: Scheme Application – All Branches

Goal: Automate notifications, task creation, and logging for all submitted scheme applications.

Flow Logic:

- Trigger:**
 - Object: Scheme Application
 - Trigger: When a record is created or updated
 - Entry Condition: Status = Submitted
- Decision Element: Scheme Type → Branch Selection**
 - Determines the branch of the submitted application (e.g., Health, Education, Welfare, etc.)

- Directs flow actions based on the branch type

3. Actions (Common for all branches):

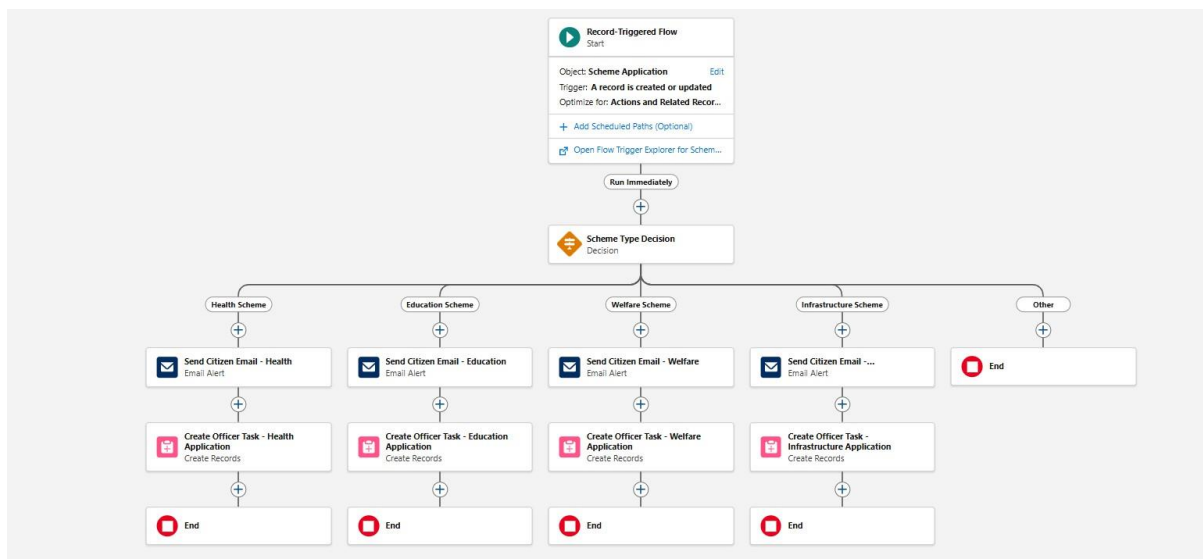
- **Send Citizen Email:** Sends an email notification to the citizen acknowledging submission of their application.
- **Create Task for Officer:** Automatically creates a task for the assigned officer to review the application.

1. End:

- Flow ends after executing all actions for the specific branch.

Impact:

- Ensures timely assignment of tasks to officers for all scheme applications.
- Keeps citizens informed with automated emails and notifications.
- Standardizes application handling across all branches, improving efficiency and accountability.



Record-Triggered Flow: Update Records – Set Status to Approved

Goal: Automatically update the Status of a Scheme Application to “Approved” when it has been approved by the officer.

Flow Element: Update Records

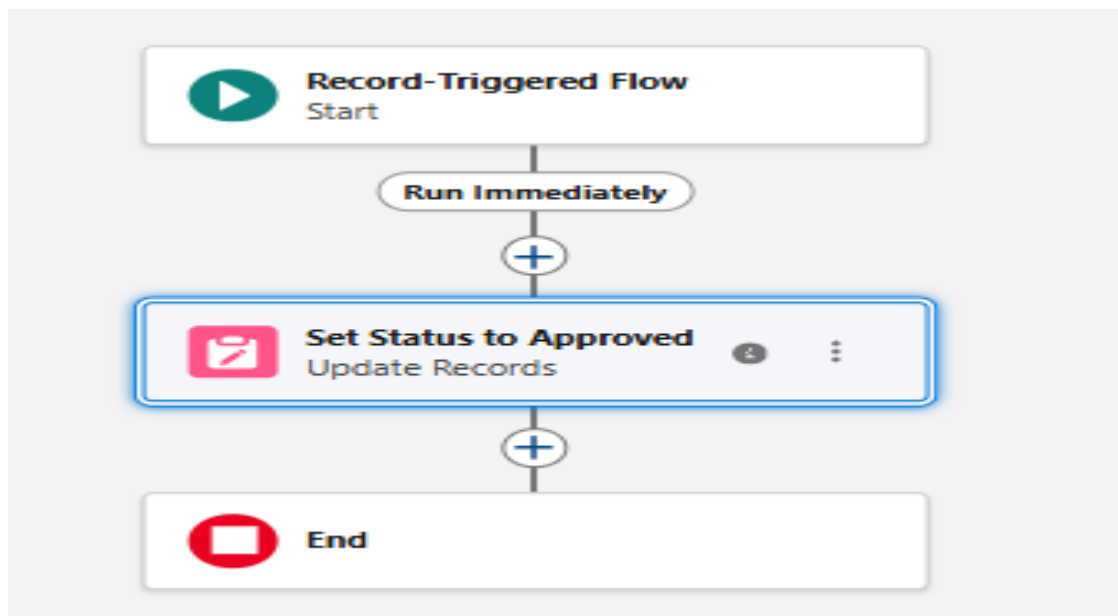
1. **Label:** Set Status to Approved
2. **API Name:** Set_Status_to_Approved
3. **Description:** Updates the Status field of the Scheme Application to “Approved” when the field Approved__c = True.

Configuration:

- **Records to Update:** The Scheme Application record that triggered the flow.
- **Filter Conditions:** None – the record is always updated if it reaches this step.
- **Field Values to Update:**
 - Field: Status
 - Value: Approved

Impact:

- Ensures that the Status field reflects the approval action automatically.
- Eliminates manual updates, improving workflow efficiency.
- Supports downstream automations and reporting by maintaining accurate application status.



Approval Process

Process Name: Scheme Application Multi-Step Approval

Objective: To implement multi-step verification and approval for Scheme Applications.

Steps:

1. **Entry Criteria:** Status = Submitted
2. **Initial Submitters:** Citizens (Scheme Application Owner)
3. **Approval Steps:**
 - **Step 1:** Officer Approval → Assigned to Officer profile

- **Step 2: Auditor Approval** → Assigned to Auditor profile

4. Final Approval Actions:

- Status updated → Approved
- Optional Email Alert → Notify Citizen (Template: App_Approved_Citizen)

5. Final Rejection Actions:

- Status updated → Rejected
- Optional Email Alert → Notify Citizen (Template: App_Rejected_Citizen)

6. Page Layout Settings: Submit for Approval button and Approval History added.

7. Submission Settings: Allow submitters to recall approval requests.

Impact: Ensures structured review, automates notifications, and provides audit tracking.

Approval Processes

Scheme Application: Scheme Application Multi-Step Approval

[← Back to Approval Process List](#)

Process Definition Detail Edit Clone Delete

Process Name	Scheme Application Multi-Step Approval	Active	<input type="checkbox"/> i
Unique Name	Auditor_Approval	Next Automated Approver Determined By	
Description			
Entry Criteria	Scheme Application: Status EQUALS Submitted		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	Appointment for Unauthenticated User using Appointment Types - For third party		
Initial Submitters	Scheme Application Owner, Role: Auditor, Role: Citizen		
Created By	Anala Lasya, 9/28/2025, 11:52 AM	Modified By	Anala Lasya, 9/28/2025, 11:56 AM

Approval Processes

Scheme Application: Scheme Application Multi-Step Approval

[← Back to Approval Process List](#)

Process Definition Detail Edit Clone Delete

Process Name	Scheme Application Multi-Step Approval	Active	<input type="checkbox"/> i
Unique Name	Scheme_Application_Multi_Step_Approval	Next Automated Approver Determined By	
Description			
Entry Criteria	Scheme Application: Status EQUALS Submitted		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	Canceled Service Appointment Confirmation Email		
Initial Submitters	Scheme Application Owner, Role: Citizen		
Created By	Anala Lasya, 9/28/2025, 11:50 AM	Modified By	Anala Lasya, 9/28/2025, 11:50 AM

Email Alerts

Email alerts automate communication between Officers and Citizens to ensure timely notifications about Scheme Applications.

1. Citizen Application Submitted Alert

- **Object:** Scheme Application
- **Email Template:** App_New_Submitted_Citizen
- **Trigger/Use:** Sent to the Citizen to confirm that their application has been submitted successfully.
- **Purpose:** Keeps the citizen informed and provides acknowledgment of submission.

2. Officer Notification Alert

- **Object:** Scheme Application
- **Email Template:** App_New_Submitted_Officer
- **Trigger/Use:** Sent to the Officer when a new Scheme Application is submitted.
- **Purpose:** Ensures Officers are notified to review the submitted application promptly.

Impact:

- Automates notifications, reducing manual communication.
- Keeps all stakeholders informed in real-time.
- Supports faster processing of submitted applications.

Email Alert

Citizen Application Submitted Alert

[Rules Using This Email Alert \(0\)](#) | [Approval Processes Using This Email Alert \(0\)](#) | [Entitlement Processes Using This Email Alert \(0\)](#)

Email Alert Detail Edit Delete Clone

Description	Citizen Application Submitted Alert	Email Template	Marketing: Product Inquiry Response
Unique Name	Citizen_Application_Submitted_Alert	Object	Scheme Application
From Email Address	Current User's email address		
Recipients	Role: Citizen		
Additional Emails			
Created By	Anala Lasya , 9/28/2025, 12:03 PM	Modified By	Anala Lasya , 9/28/2025, 12:03 PM

Edit Delete Clone

Email Alert

Officer Notification Alert

[Rules Using This Email Alert \(0\)](#) |
 [Approval Processes Using This Email Alert \(0\)](#) |
 [Entitlement Processes Using This Email Alert \(0\)](#)

Help for

Email Alert Detail

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Description	Officer Notification Alert	Email Template	Commerce Reorder Portal: Invitation
Unique Name	Officer_Notification_Alert	Object	Scheme Application
From Email Address	Current User's email address		
Recipients	Role: Scheme officer User: officer1 officer		
Additional Emails			
Created By	Anala Lasya , 9/28/2025, 12:06 PM	Modified By	Anala Lasya , 9/28/2025, 12:06 PM

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Email Folders & Templates

Email Folder:

- **Name:** Govt Schemes Templates
- **Purpose:** Organizes all email templates for easy access, management, and reusability.

Email Templates:

- Templates are reusable email messages that can be linked to workflows, flows, or approval processes to automate notifications.

Templates Created:

1. **App_New_Submitted_Citizen** → Notifies Citizens about application submission.
2. **App_New_Submitted_Officer** → Notifies Officers about new submissions.
3. **App_Approved_Citizen** → Notifies Citizens when application is approved.
4. **App_Approved_Officer** → Notifies Officers when an application is approved.
5. **App_Rejected_Citizen** → Notifies Citizens when an application is rejected.
6. **Fund_Disbursed_Citizen** → Notifies Citizens when funds are released.
7. **Fund_Transaction_Issue_Officer** → Notifies Officers about fund transaction issues.

Impact:

- Ensures consistent, professional communication.
- Reduces manual email sending.
- Supports automation in workflows, flows, and approval processes.
- Centralized folder allows easy updates and maintenance of templates.