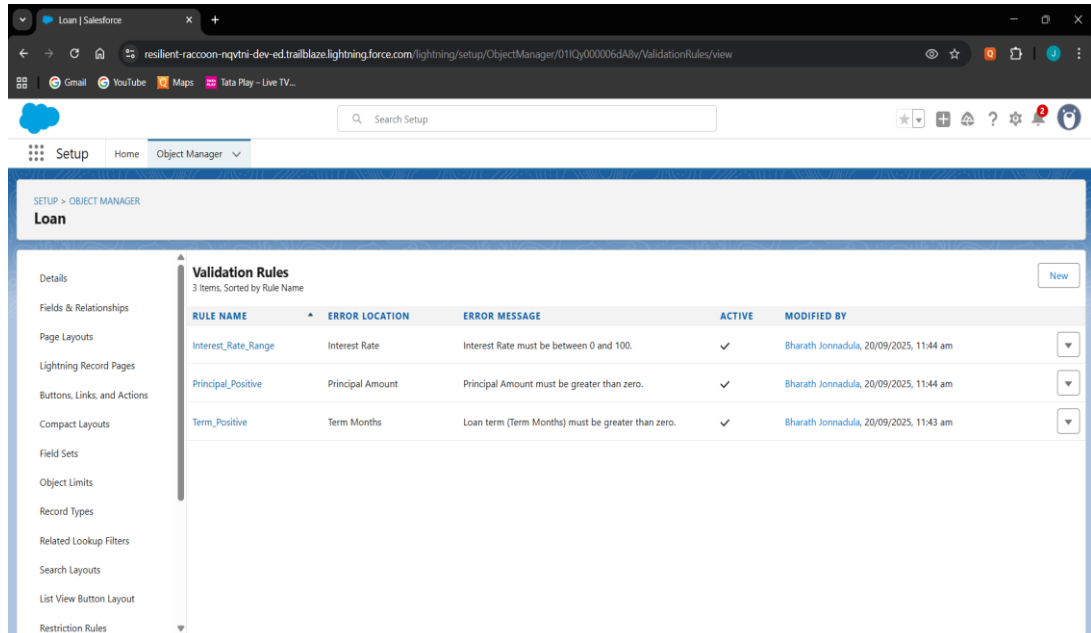


Phase 4: Process Automation (Admin)

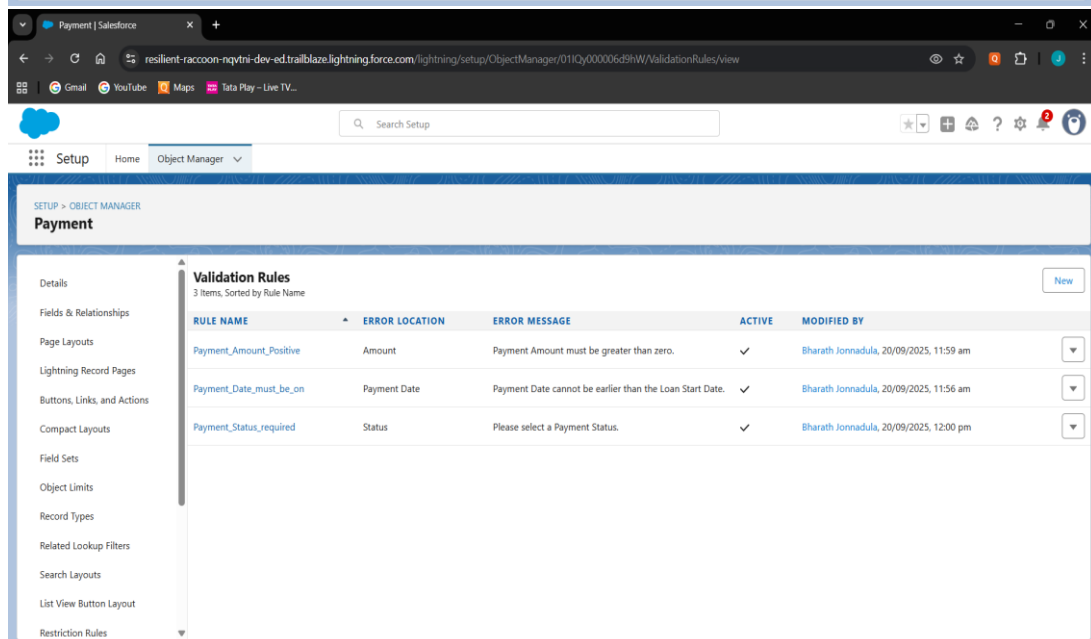
Validation Rules

- Ensure values are valid (Loan/Payment/Recovery > 0).
- Prevent negative amounts and invalid dates.



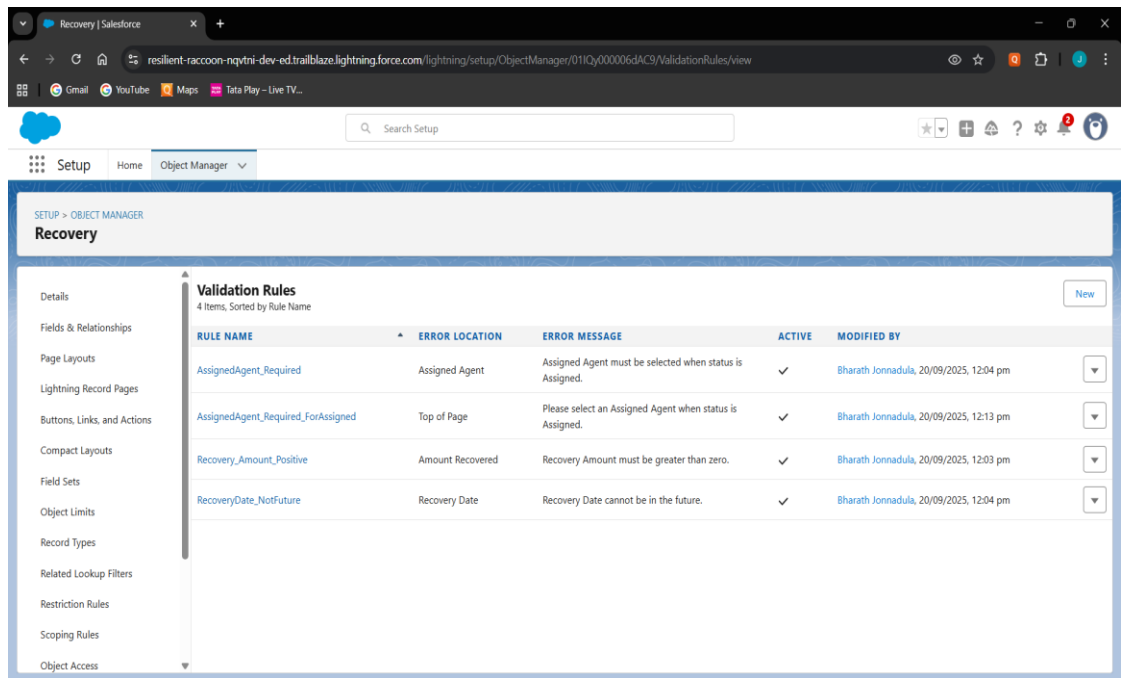
The screenshot shows the Salesforce Setup page for the 'Loan' object. The 'Validation Rules' section is active, displaying a table with 3 items. The table columns are: RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The rules listed are: Interest_Rate_Range, Principal_Positive, and Term_Positive. Each rule is active and was modified by Bharath Jonnadula on 20/09/2025.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Interest_Rate_Range	Interest Rate	Interest Rate must be between 0 and 100.	✓	Bharath Jonnadula, 20/09/2025, 11:44 am
Principal_Positive	Principal Amount	Principal Amount must be greater than zero.	✓	Bharath Jonnadula, 20/09/2025, 11:44 am
Term_Positive	Term Months	Loan term (Term Months) must be greater than zero.	✓	Bharath Jonnadula, 20/09/2025, 11:43 am



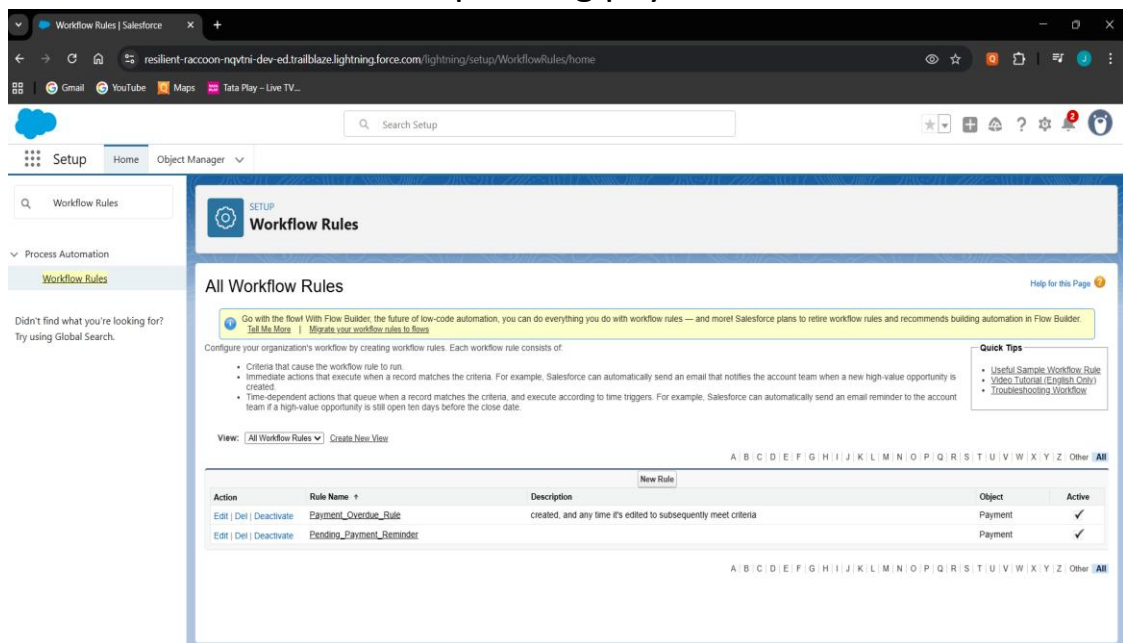
The screenshot shows the Salesforce Setup page for the 'Payment' object. The 'Validation Rules' section is active, displaying a table with 3 items. The table columns are: RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The rules listed are: Payment_Amount_Positive, Payment_Date_must_be_on, and Payment_Status_required. Each rule is active and was modified by Bharath Jonnadula on 20/09/2025.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Payment_Amount_Positive	Amount	Payment Amount must be greater than zero.	✓	Bharath Jonnadula, 20/09/2025, 11:59 am
Payment_Date_must_be_on	Payment Date	Payment Date cannot be earlier than the Loan Start Date.	✓	Bharath Jonnadula, 20/09/2025, 11:56 am
Payment_Status_required	Status	Please select a Payment Status.	✓	Bharath Jonnadula, 20/09/2025, 12:00 pm



Workflow Rules

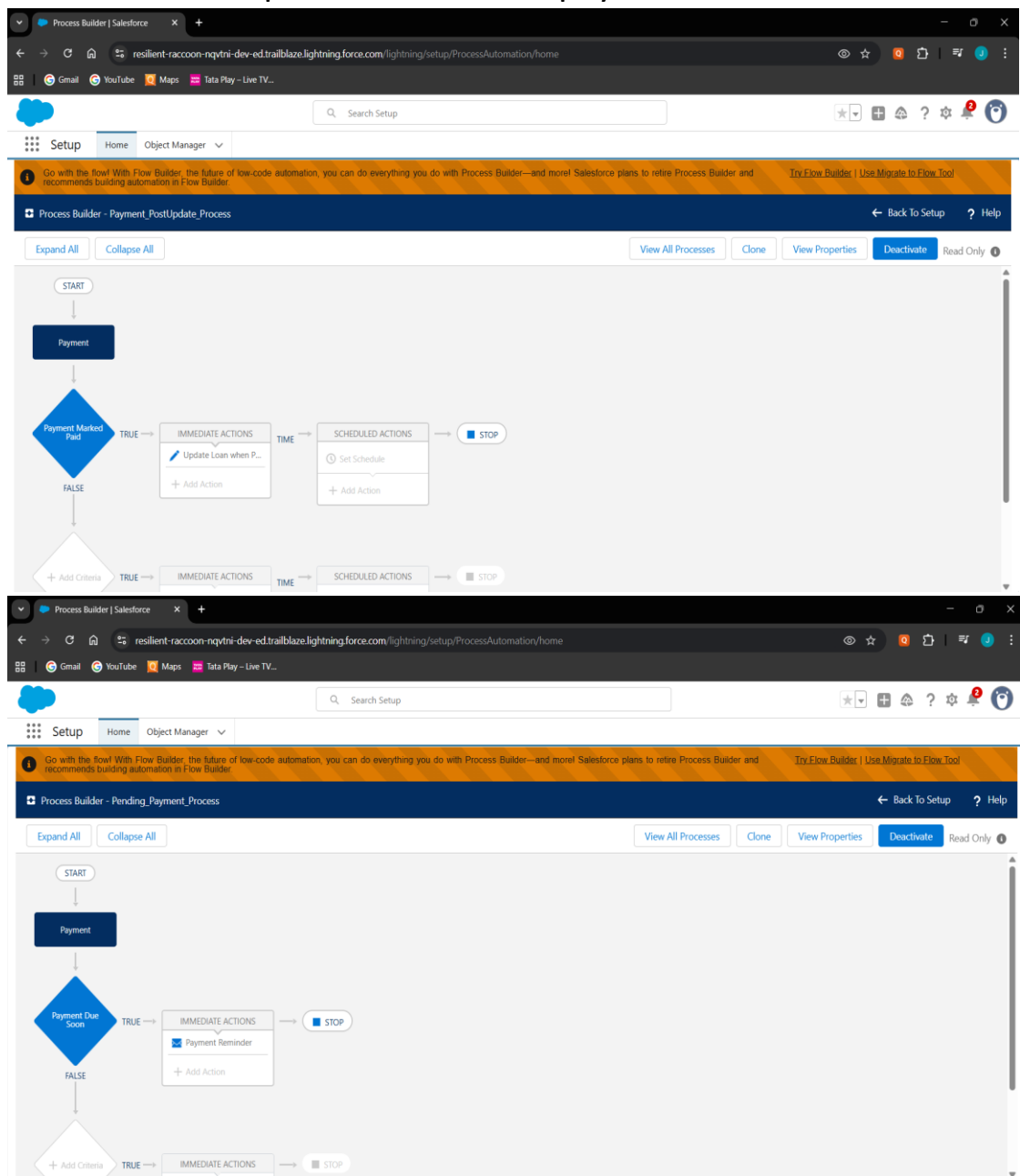
- Rule: Pending_Payment_Reminder.
- Sends reminder email for pending payments.



Process Builder

- Sends email reminders for due payments.
- Updates Loan status when all Payments are paid.

- Creates follow-up task for overdue payments.



Approval Process

- Loans > 5 Lakhs require Manager approval.
- Auto email + status update on approval/rejection.

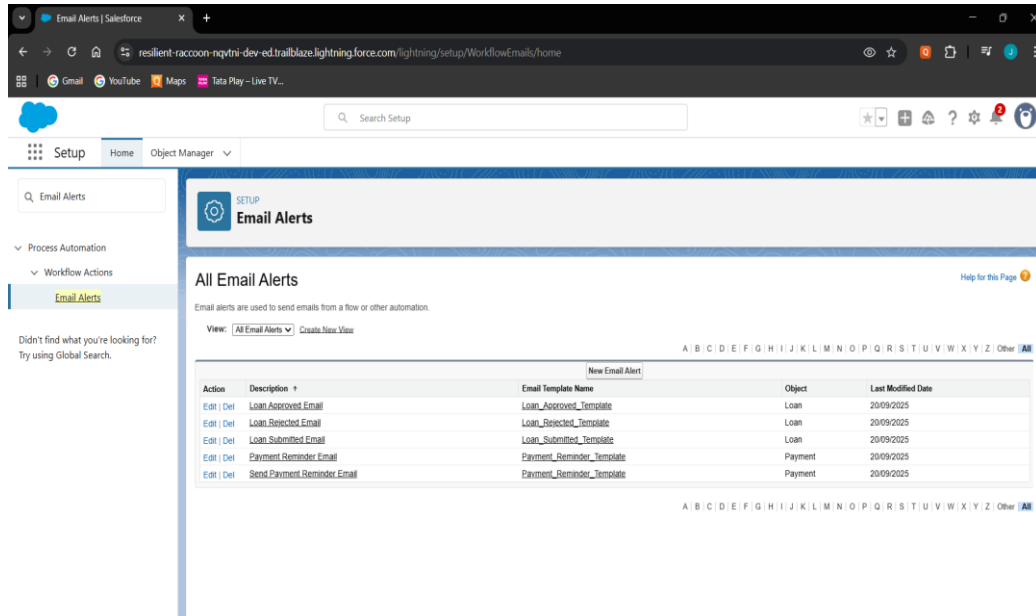
Flow Builder

- Scheduled Flow: Sends payment reminders 2 days before due.
- Record-Triggered: Marks payments overdue automatically.

- Record-Triggered: Creates Recovery record when overdue.

Email Alerts

- Payment_Reminder_Email → Customer.
- Loan_Submitted, Approved, Rejected → Manager/Officer.

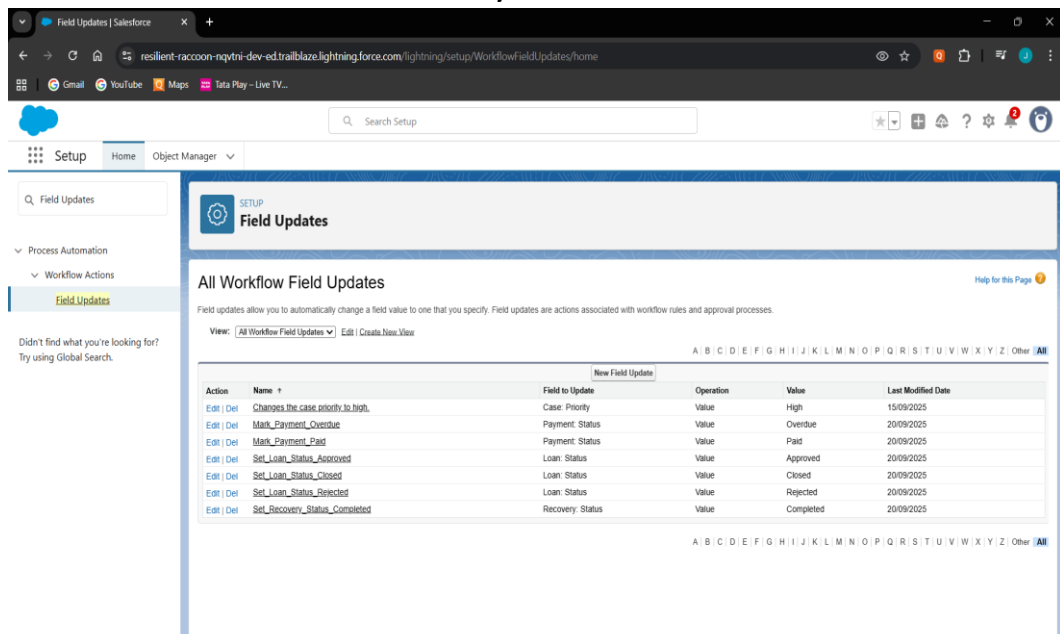


The screenshot shows the Salesforce Setup page for Email Alerts. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled "Email Alerts" and includes a search bar and a "New Email Alert" button. Below this is a table listing all email alerts.

Action	Description	Email Template Name	Object	Last Modified Date
Edit Del	Loan Approved Email	Loan_Aproved_Template	Loan	20/09/2025
Edit Del	Loan Rejected Email	Loan_Rejected_Template	Loan	20/09/2025
Edit Del	Loan Submitted Email	Loan_Submitted_Template	Loan	20/09/2025
Edit Del	Payment Reminder Email	Payment_Reminder_Template	Payment	20/09/2025
Edit Del	Send Payment Reminder Email	Payment_Reminder_Template	Payment	20/09/2025

Field Updates

- Auto-change Payment.Status to Overdue.
- Auto-close Loan when all Payments are Paid.



The screenshot shows the Salesforce Setup page for Field Updates. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled "Field Updates" and includes a search bar and a "New Field Update" button. Below this is a table listing all workflow field updates.

Action	Name	Field to Update	Operation	Value	Last Modified Date
Edit Del	Changes the case priority to high	Case: Priority	Value	High	15/09/2025
Edit Del	Mark Payment Overdue	Payment: Status	Value	Overdue	20/09/2025
Edit Del	Mark Payment Paid	Payment: Status	Value	Paid	20/09/2025
Edit Del	Set Loan Status Approved	Loan: Status	Value	Approved	20/09/2025
Edit Del	Set Loan Status Closed	Loan: Status	Value	Closed	20/09/2025
Edit Del	Set Loan Status Rejected	Loan: Status	Value	Rejected	20/09/2025
Edit Del	Set Recovery Status Completed	Recovery: Status	Value	Completed	20/09/2025

Tasks

- Task created when Payment is Overdue.
- Assigned to Recovery Agent with high priority.

Custom Notifications

- Sends in-app notification for Overdue Payments.