Phase 4: Process Automation (Admin)

In this phase, various Salesforce automation tools were configured and implemented in the Corporate Loan Management System (CLMS).
The purpose of these automations is to ensure smooth processing of loan applications, enforce business rules, reduce manual effort, and provide real-time updates to different stakeholders involved in the loan lifecycle.

The tools used include:

- Validation Rules
- Workflow Rules
- Process Builder
- Approval Process
- Flow Builder (evaluated)
- Email Alerts
- Field Updates
- Tasks
- Custom Notifications

🔹 Validation Rules

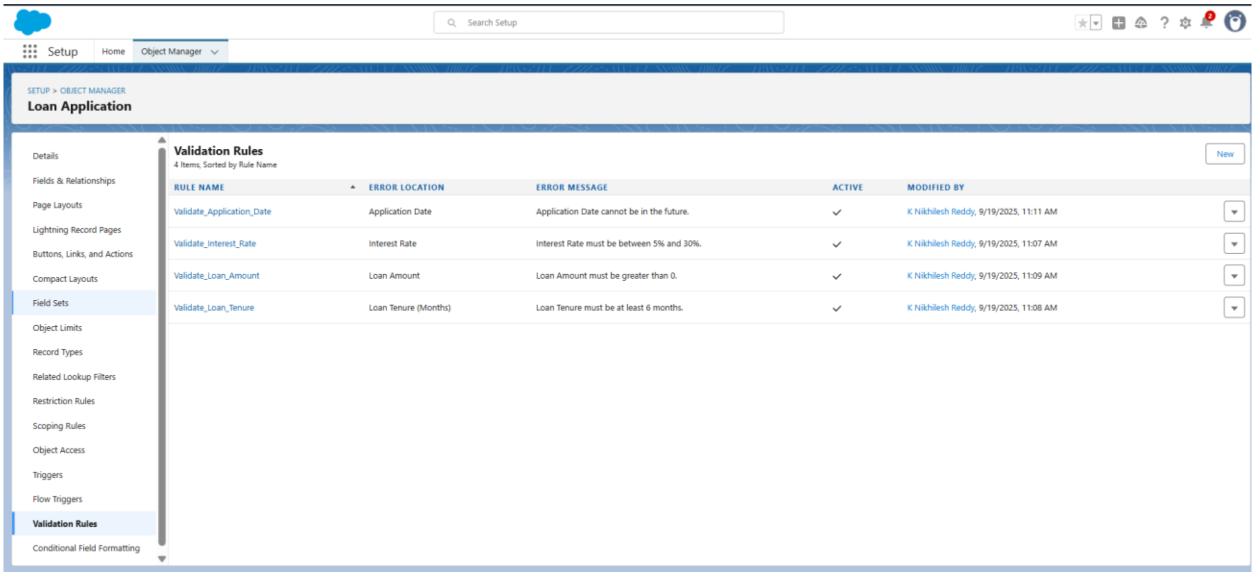
Validation Rules were created on the Loan Application object to ensure data accuracy and enforce corporate policies. These rules prevent users from saving invalid data.

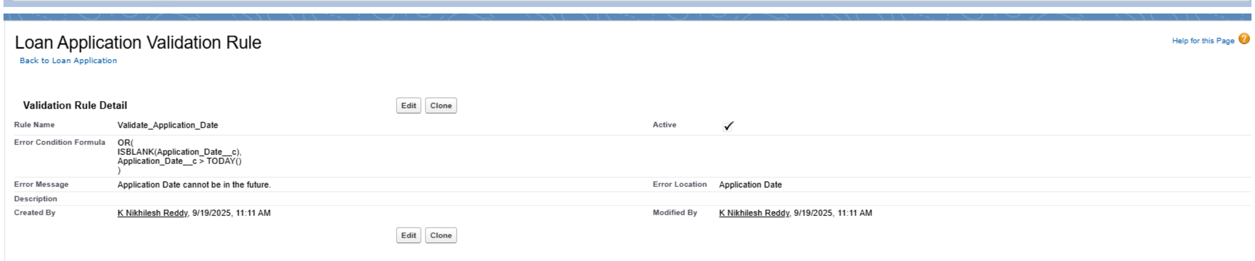
- Loan Amount Validation → Loan Amount must be greater than zero.
- Loan Tenure Validation → Tenure must be at least 6 months.
- Interest Rate Validation → Interest rate must be between 5% and 30%.

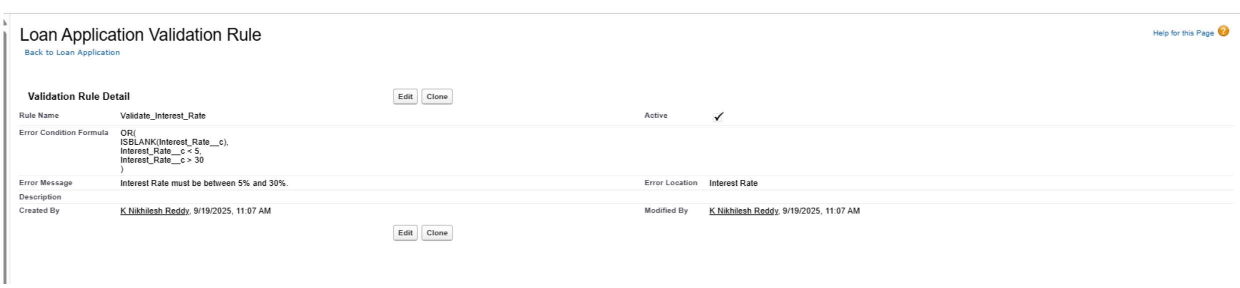
- Application Date Validation → Application date cannot be in the future.

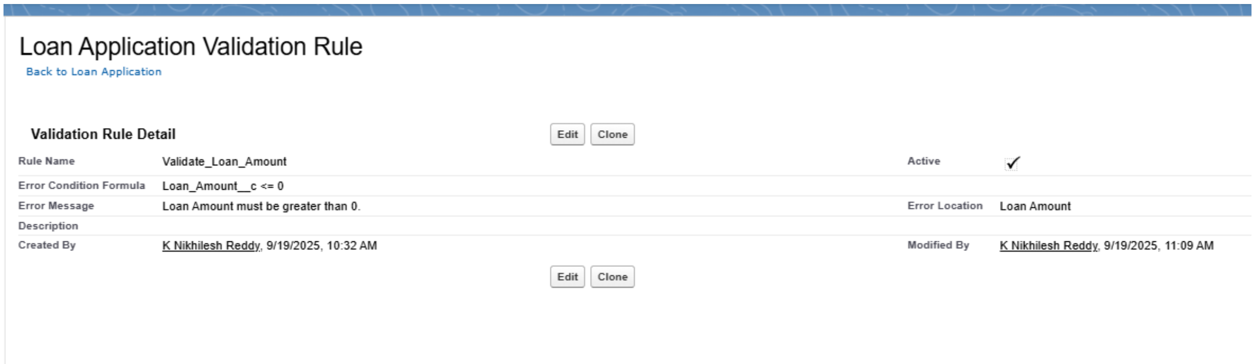
Outcome: Invalid or inconsistent data cannot be saved, which maintains high data integrity.

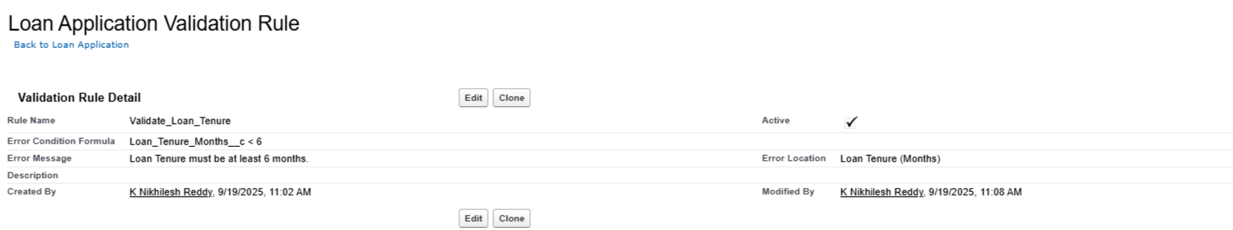
Screenshot:











- Workflow Rules

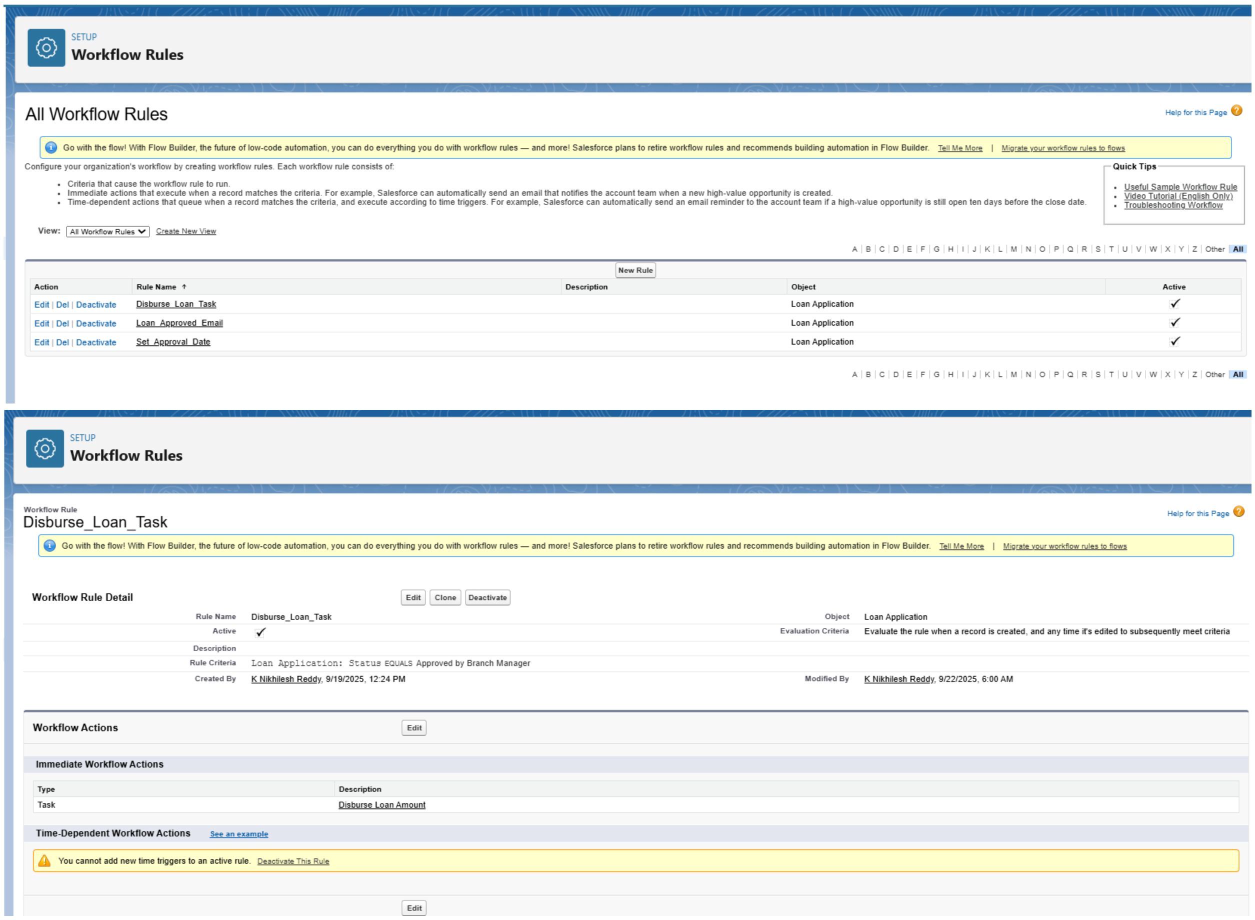
Workflow Rules were implemented to automate routine actions triggered on Loan Applications.

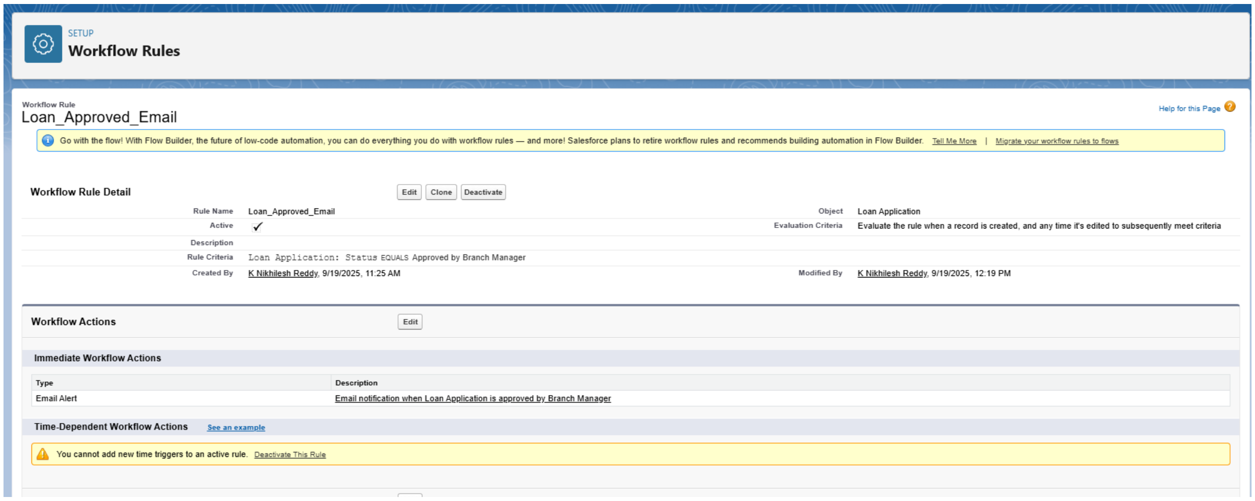
- Workflow 1: Email on Loan Approval
  - Trigger: Status = Approved by Branch Manager
  - Action: Sends automated Loan Approval Email to Loan Officer
- Workflow 2: Approval Date Auto-update
  - Trigger: Status = Approved by Branch Manager
  - Action: Updates Approval_Date__c with TODAY()
- Workflow 3: Task Assignment to Finance Officer
  - Trigger: Status = Approved by Branch Manager

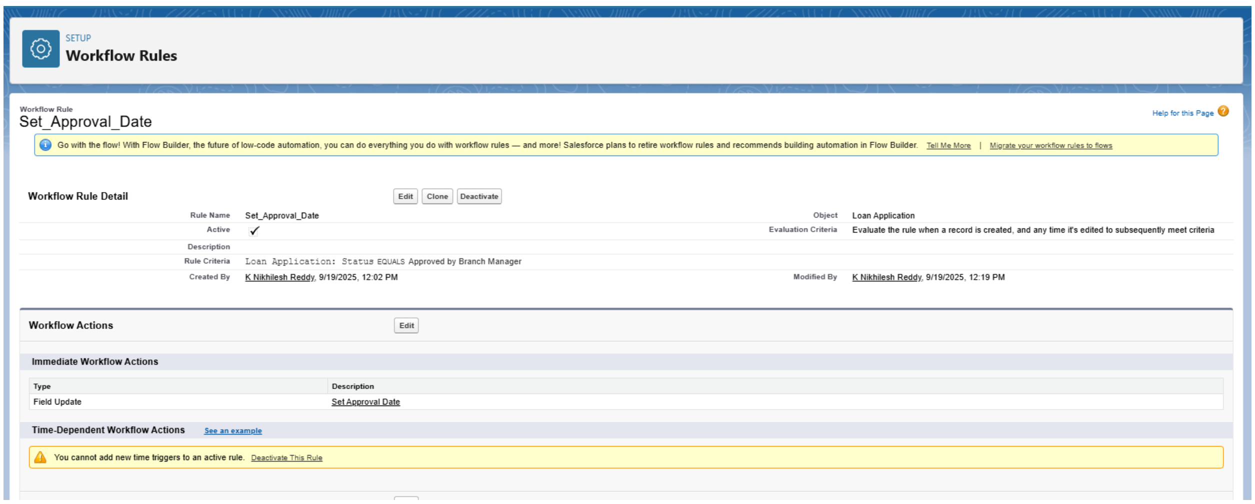
- Action: Creates a Task “Disburse Loan Amount” for Finance Officer (due next day)

Outcome: Loan Officers are notified, approval timelines are recorded, and Finance Officers are reminded to disburse funds.

Screenshot:







- Process Builder

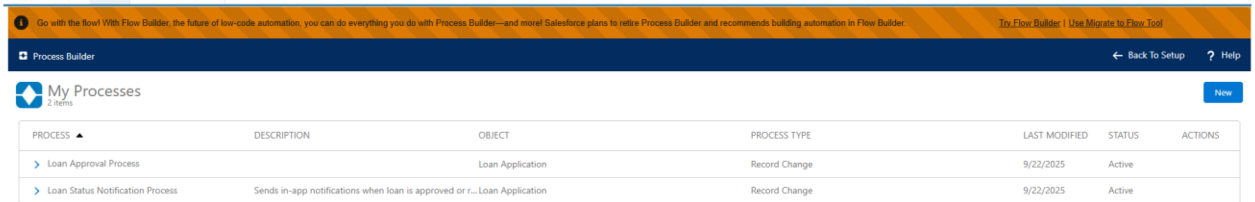
Process Builder was used for advanced automation that required creating related records.

- Process: Loan Approval Process
  - Object: Loan Application
  - Trigger: Status = Approved by Branch Manager
  - Action: Create EMI Schedule record with:

- Loan Application linked to approved Loan
- EMI Amount = Loan Amount ÷ Loan Tenure
- Due Date = Today + 30 days
- Status = Pending

Outcome: EMI Schedules are generated automatically upon loan approval.

Screenshot:



Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with Process Builder—and more! Salesforce plans to retire Process Builder and recommends building automation in Flow Builder.
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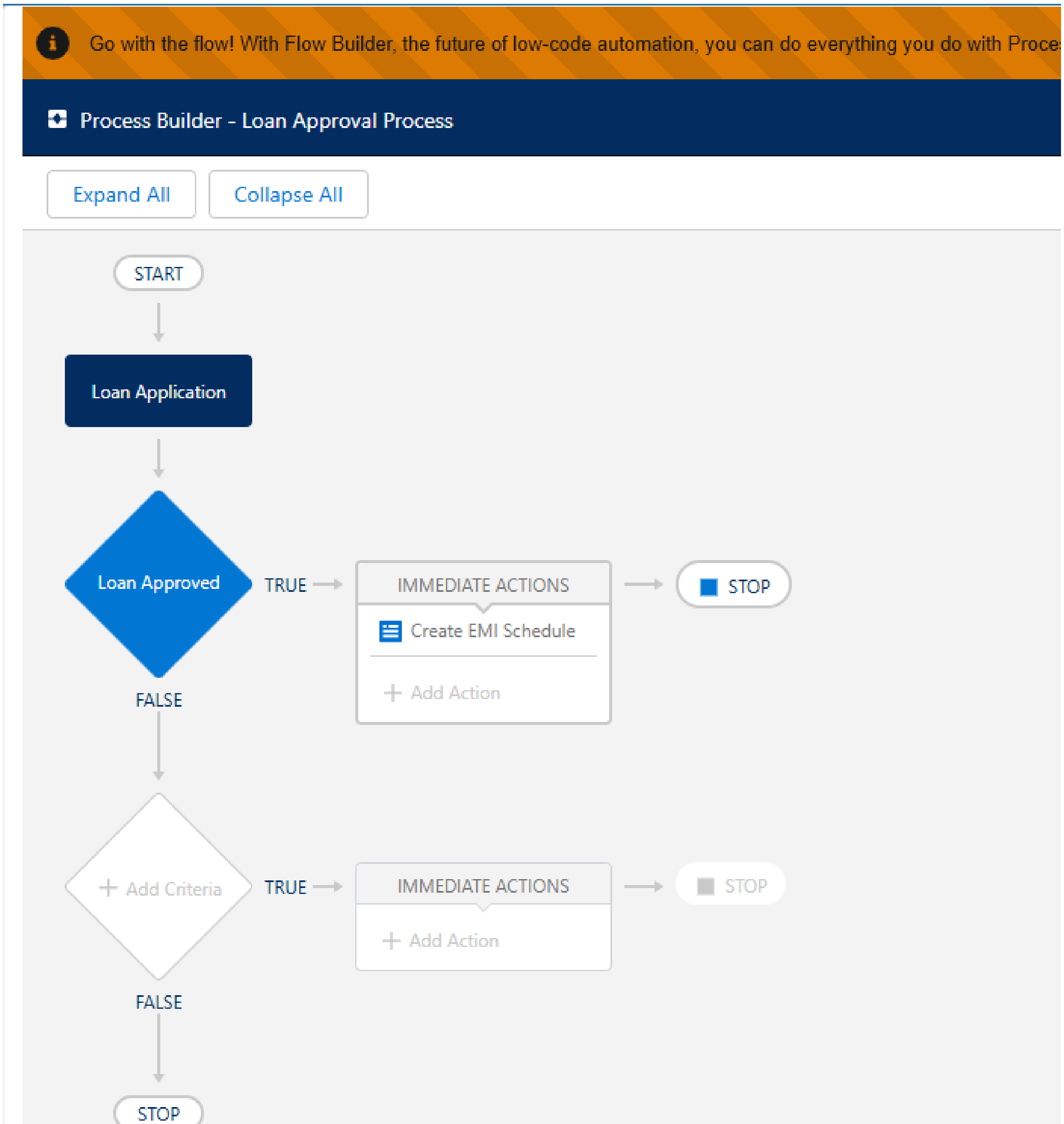
PROCESS
DESCRIPTION
OBJECT
PROCESS TYPE
LAST MODIFIED
STATUS
ACTIONS
Loan Approval Process
Loan Application
Record Change
9/22/2025
Active
Loan Status Notification Process
Sends in-app notifications when loan is approved or r...
Loan Application
Record Change
9/22/2025
Active



Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with Proce
Process Builder - Loan Approval Process
Expand All
Collapse All
START
Loan Application
Loan Approved
TRUE
IMMEDIATE ACTIONS
Create EMI Schedule
Add Action
STOP
FALSE
Add Criteria
TRUE
IMMEDIATE ACTIONS
Add Action
STOP
FALSE
STOP

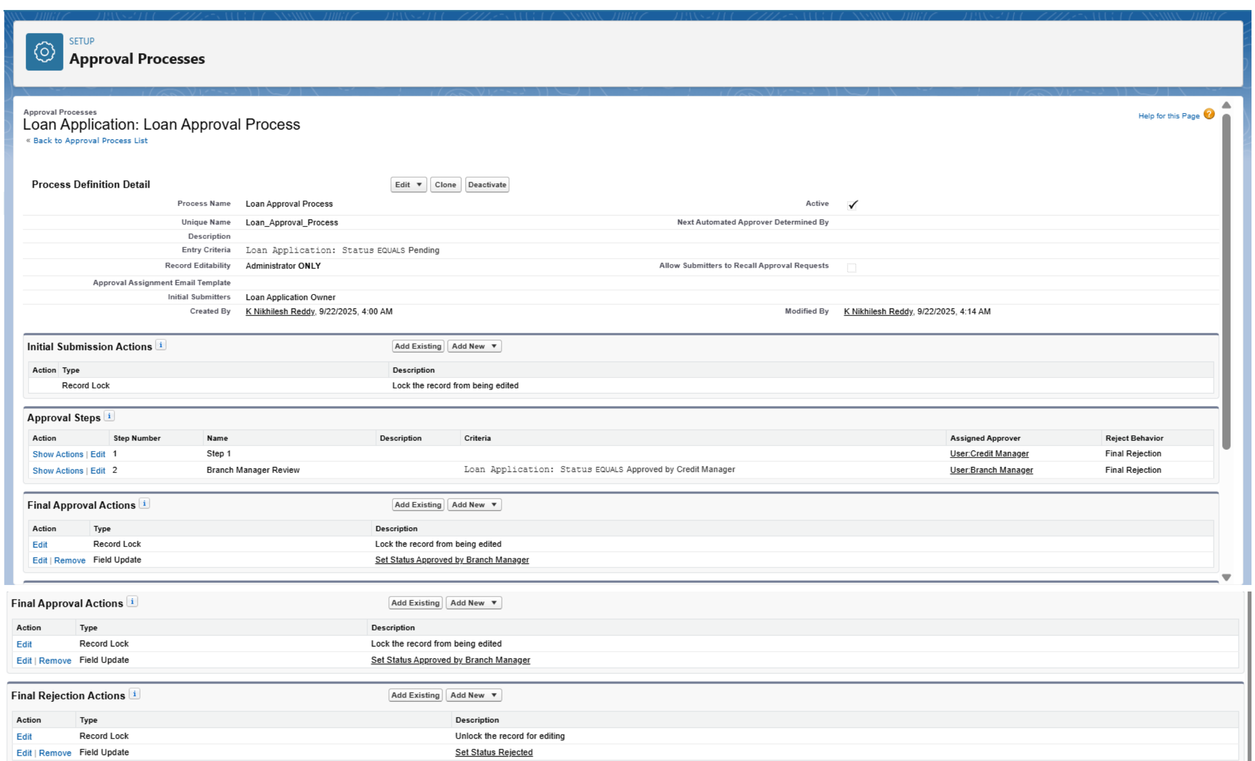
◆ Approval Process

Approval Process was created to define hierarchical loan approval.

- Step 1: Credit Manager Review → Status = Pending → Approver = Credit Manager.
- Step 2: Branch Manager Review → Status = Approved by Credit Manager → Approver = Branch Manager.
- Final Approval Action: Status updated to Approved by Branch Manager → triggers Workflow Rules + EMI creation.
- Final Rejection Action: Status updated to Rejected → Loan Officer notified (optional rejection email).

Outcome: Loans follow a structured, hierarchical approval chain (Loan Officer → Credit Manager → Branch Manager).

Screenshot:



◆ Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)

Flow Builder was evaluated but not used in this project to avoid redundancy.

- Workflow Rules and Process Builder were sufficient for the required automations.
- Flow Builder can be used in future enhancements (guided screens, scheduled updates).

Outcome: The automation design remains simple but scalable.

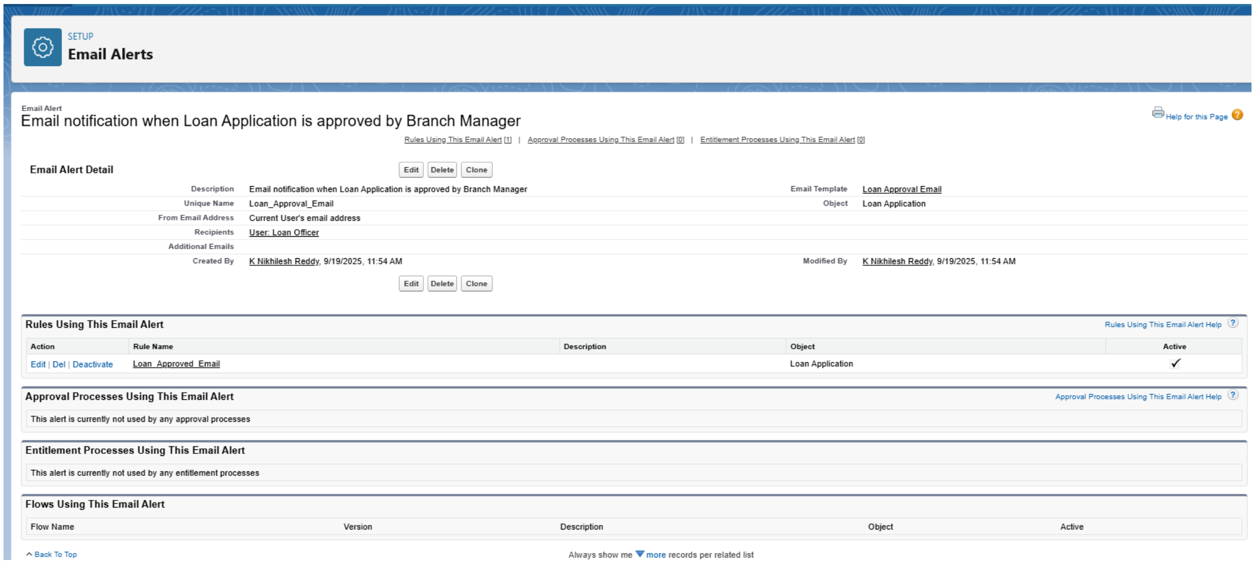
◆ Email Alerts

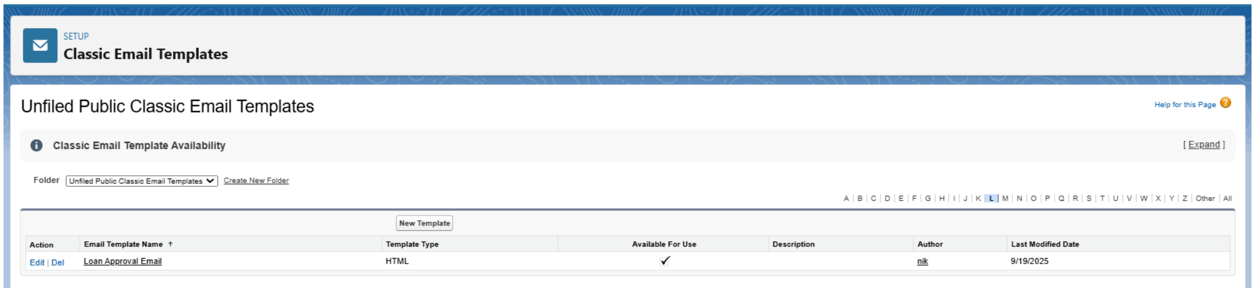
Email Alerts notify stakeholders of important loan lifecycle events.

- Loan Approval Email → Sent to Loan Officer

Outcome: Ensures transparency and timely communication.

Screenshot:





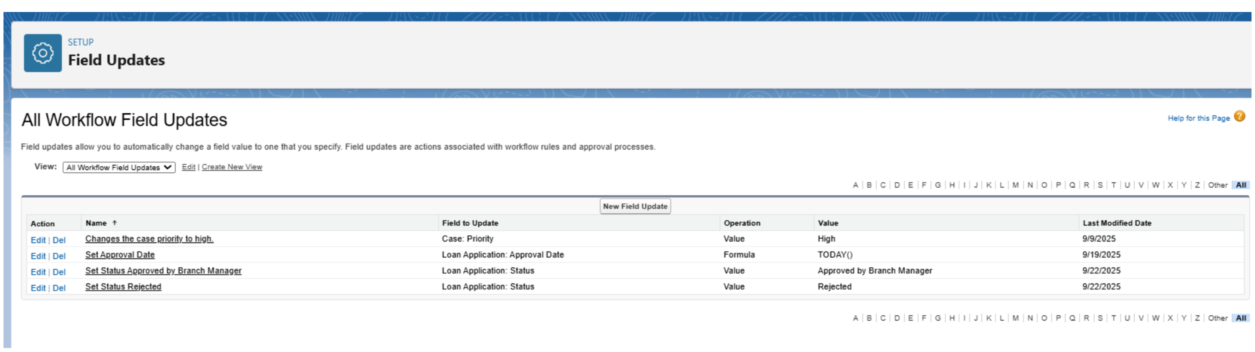
◆ Field Updates

Field Updates were configured to ensure data accuracy.

- Approval_Date__c auto-updated with TODAY() when loan is approved.

Outcome: Approval timelines are tracked automatically.

Screenshot:



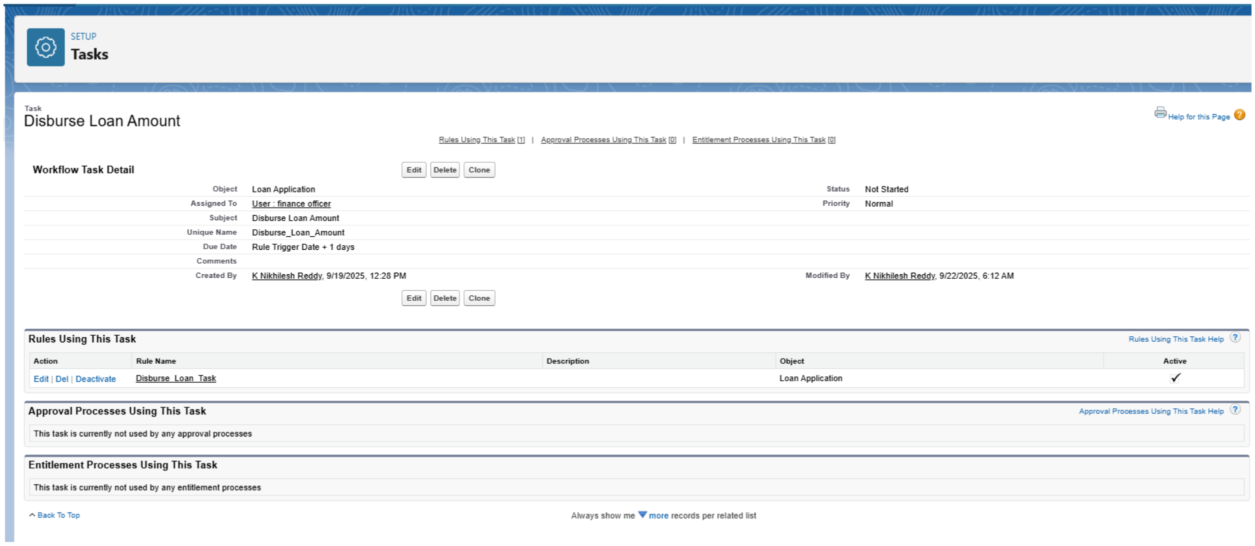
◆ Tasks

Tasks were created to assign responsibilities automatically.

- Finance Officer Task: When loan is approved, task “Disburse Loan Amount” is created for Finance Officer with due date = next day.

Outcome: Ensures disbursal activities are completed on time.

Screenshot:



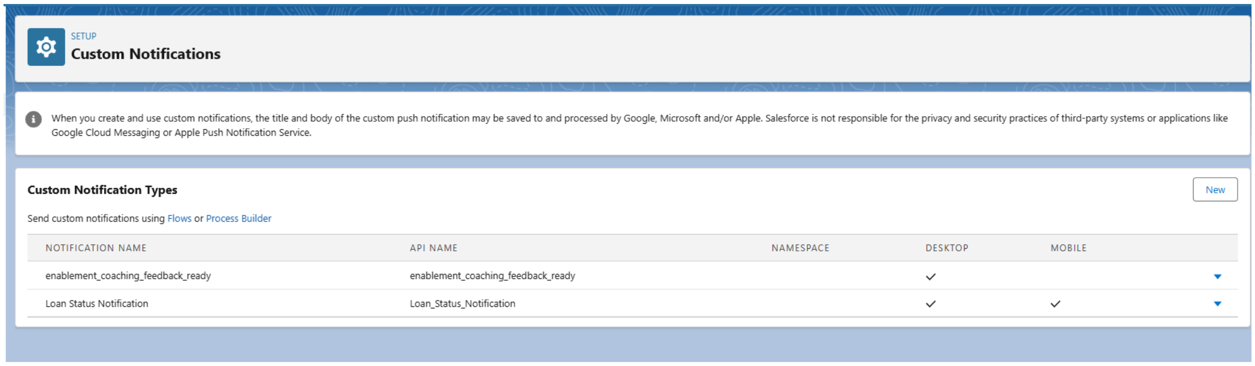
◆ Custom Notifications

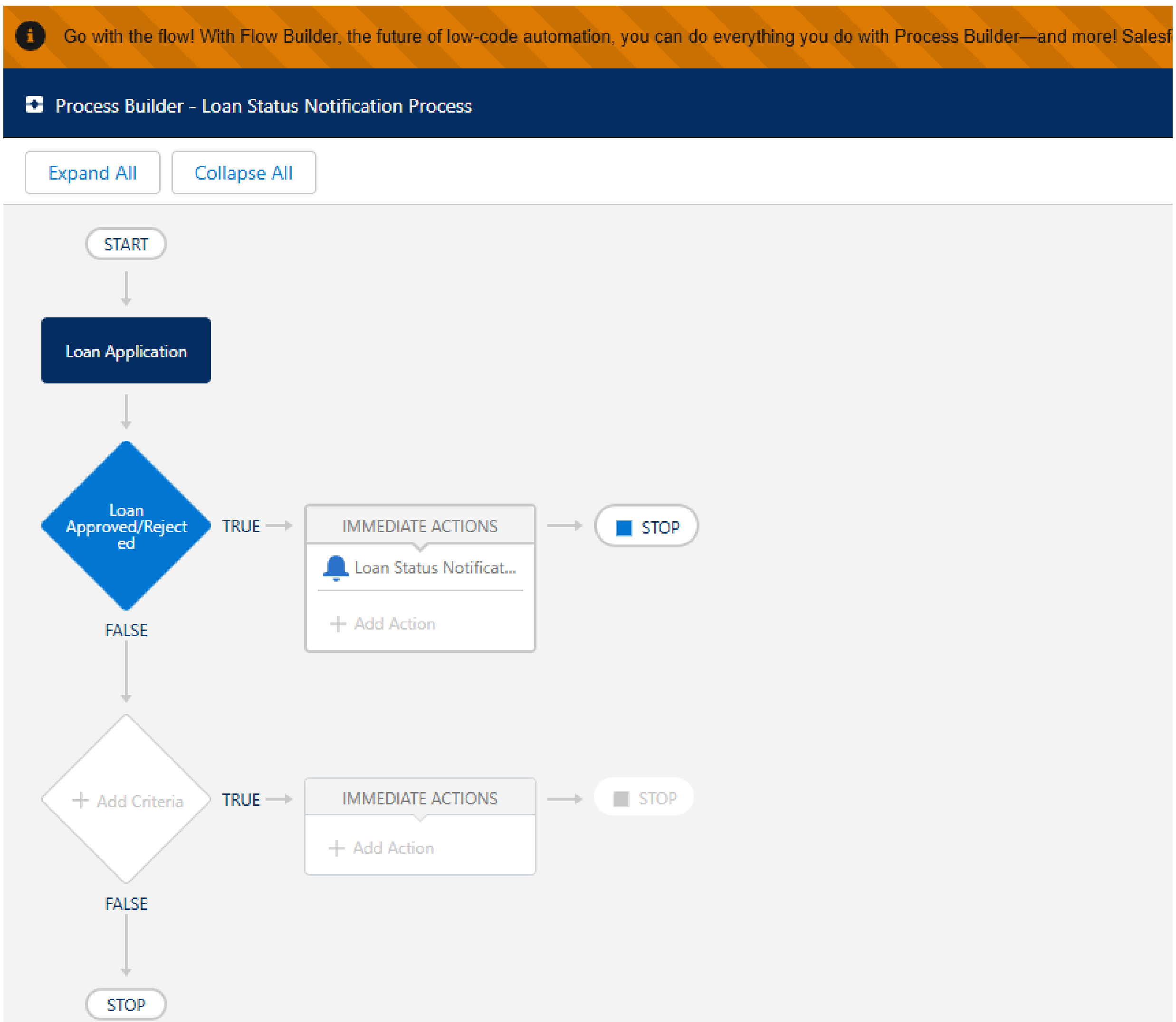
Custom Notifications provide real-time in-app alerts to Loan Officers.

- Process: Loan Status Notification Process
  - Trigger: Status = Approved by Branch Manager OR Rejected
  - Recipient: Loan Application Owner (Loan Officer)
  - Title: Loan Status Update
  - Message:
  - Loan Application [Loan_Application__c].Name has been [Loan_Application__c].Status__c.

Outcome: Loan Officers receive instant approval/rejection notifications in Salesforce Lightning and Mobile.

Screenshot:





- End-to-End Automation Flow

1. Loan Officer submits Loan Application (Status = Pending).
2. Credit Manager approves → Status = Approved by Credit Manager.
3. Branch Manager approves → Status = Approved by Branch Manager.
4. Automations triggered:
   - Loan Officer notified via email
   - Approval Date auto-stamped
   - Task assigned to Finance Officer
   - EMI Schedule automatically created
   - Loan Officer receives custom notification
5. If rejected → Status = Rejected → Loan Officer notified.