Phase 4: Process Automation (Admin)

Objective: Automate insurance business workflows using Salesforce declarative tools to minimize manual effort, reduce errors, and enhance efficiency.

Concepts Covered:

- Validation Rules
- Workflow Rules
- Process Builder
- Approval Process
- Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched)
- Email Alerts
- Field Updates
- Tasks
- Custom Notifications

Industry Application (Insurance Portal Use Case):

Insurance portals involve complex workflows such as policy renewals, claim approvals, and premium tracking. Automating these processes improves customer satisfaction and reduces operational costs.

Sample Configurations & Examples:

- Validation Rules: Prevent claim submission if policy status is Expired or Lapsed.
- Workflow Rules: Send an email alert to customers 30 days before policy renewal date.
- Process Builder: Auto-update policy status to 'Lapsed' if payment is overdue by more than 15 days.
- Approval Process: Claims over ■1,00,000 require approval from Regional Manager.
- Flow Builder:
- • Record-Triggered Flow: Create a task for Agent when a high-value lead is added.
- • Screen Flow: Guide agents through new policy creation with mandatory steps.
- • Scheduled Flow: Auto-generate monthly premium reminders.
- Email Alerts: Notify Claims Adjuster when a new claim is submitted.
- Field Updates: Auto-update Claim Status to 'Approved' once manager approves it.
- Tasks: Assign renewal follow-up tasks to agents automatically.
- Custom Notifications: Send push notifications to managers on mobile app for urgent claim escalations.

Key Takeaways:

- Declarative automation reduces dependency on Apex for routine processes.
- Flows are the most powerful and recommended tool for modern Salesforce automation.
- Approval processes ensure compliance and governance in high-value insurance claims.
- Email alerts, tasks, and notifications keep all stakeholders informed in real time.