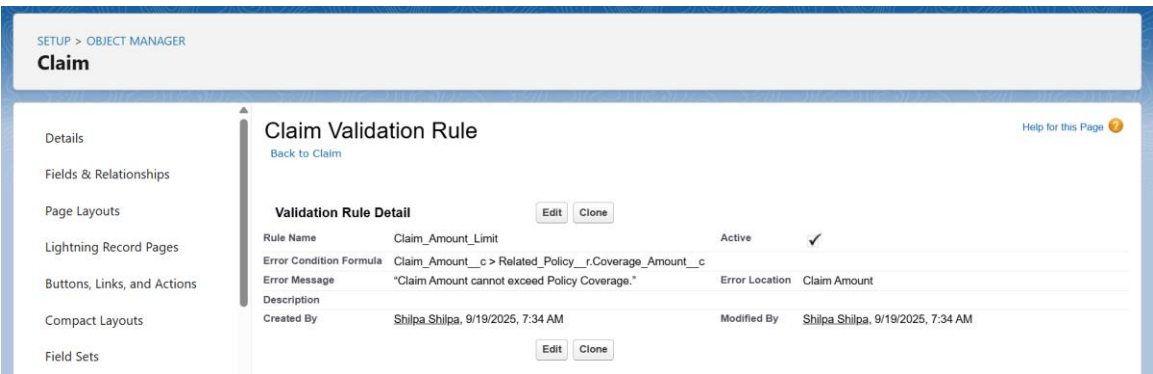


Phase 4-Process Automation (Admin)

In Phase 4, process automation tools were used to streamline business workflows. This phase included implementing validation, workflow rules, approvals, and flows to automate repetitive tasks and ensure data quality.

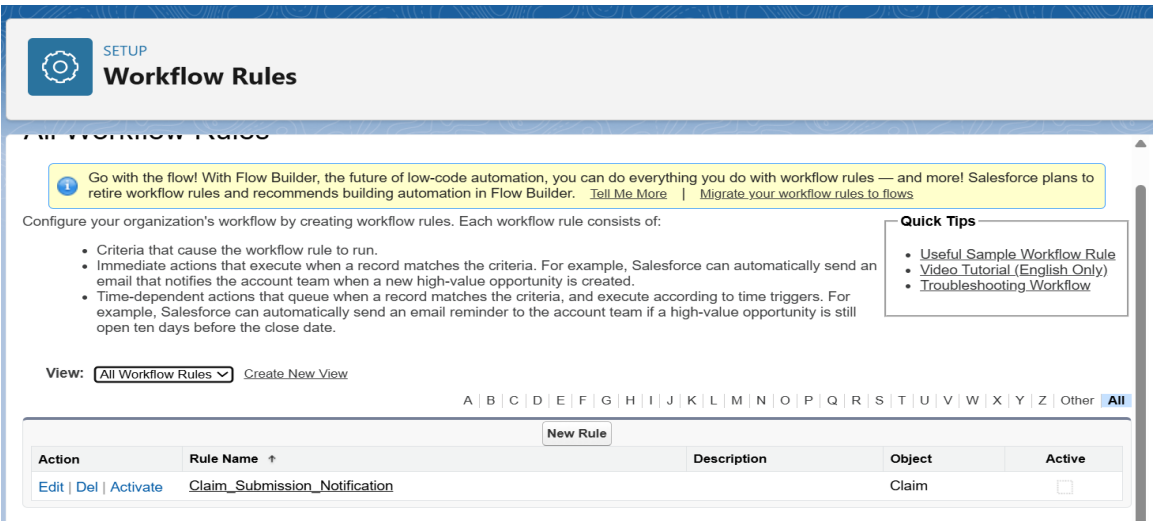
1. Validation Rules

Created validation rules to ensure data integrity. For example, prevented policy creation without a policy amount and ensured claim dates cannot be earlier than policy start dates.



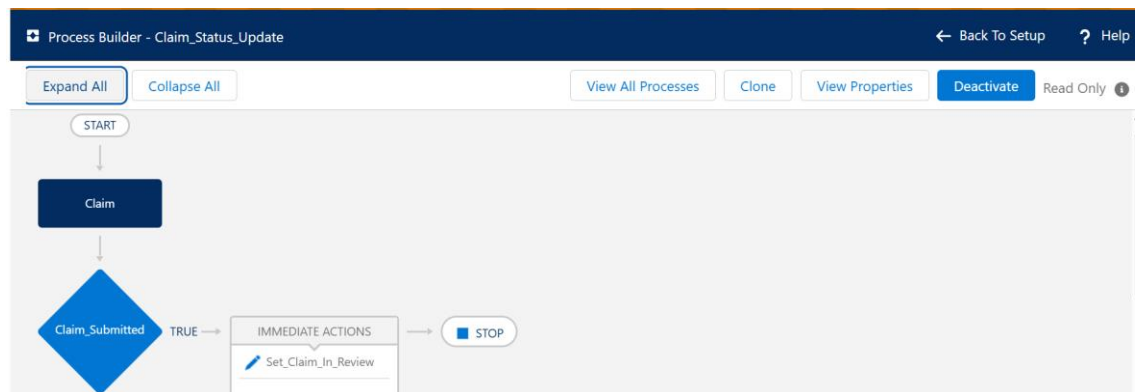
2. Workflow Rules

Configured workflow rules to send automatic email notifications when a claim is submitted and to update policy status based on claim approval.



3. Process Builder

Built processes to handle record updates automatically, such as changing claim status to 'In Review' when submitted.



4. Approval Process

Configured an approval process for claims where managers must approve before claims are finalized.

Approval Processes

Claim: Claim_Approval_Process

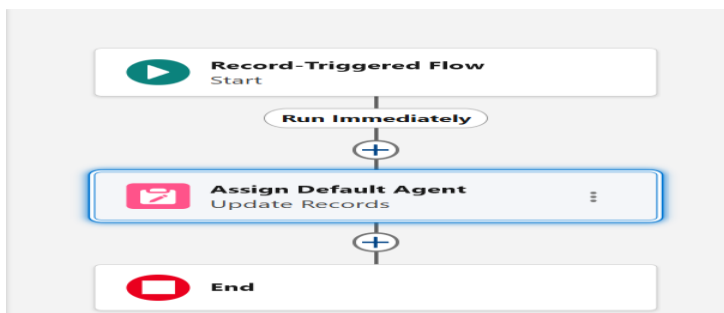
« Back to Approval Process List

Process Definition Detail [Edit] [Clone] [Delete]

Process Name	Claim_Approval_Process	Active	<input checked="" type="checkbox"/> [i]
Unique Name	Claim_Approval_Process	Next Automated Approver Determined By	Manager of Record Owner
Description	ISPICKVAL(Status__c, "Submitted")		
Entry Criteria	Administrator ONLY		
Record Editability	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>	
Approval Assignment Email Template	Account Owner		
Initial Submitters	Created By: Shilpa Shilpa, 9/24/2025, 8:38 AM		
	Modified By: Shilpa Shilpa, 9/24/2025, 8:38 AM		

5. Flow Builder

Used Flow Builder to create record-triggered flows. Example: When a new policy is created, assign the policy to a default agent automatically.



6. Email Alerts

Set up email alerts to notify agents and managers about claim approvals, rejections, and status updates.

7. Tasks & Custom Notifications

Created task assignments for follow-ups and custom notifications for urgent claim updates.

SETUP > OBJECT MANAGER

Claim

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Claim Action


Follow-up on Claim

Predefined Field Values (0)

Edit

Delete

Edit Layout

Label	Follow-up on Claim	Object Name	Claim
Standard Label Type		Action Type	Create a Record
Name	Follow_up_on_Claim	Relationship Field	Related To
Description	Automatically create a task for the assigned agent to follow up on the claim.		
Target Object	Task	Icon	
Create Feed Item	<input checked="" type="checkbox"/>		
Success Message	Task created successfully for the assigned agent.		
Created By	Shilpa Shilpa, 9/24/2025, 9:05 AM	Modified By	Shilpa Shilpa, 9/24/2025, 9:05 AM

Edit

Delete

Edit Layout

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