# 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.
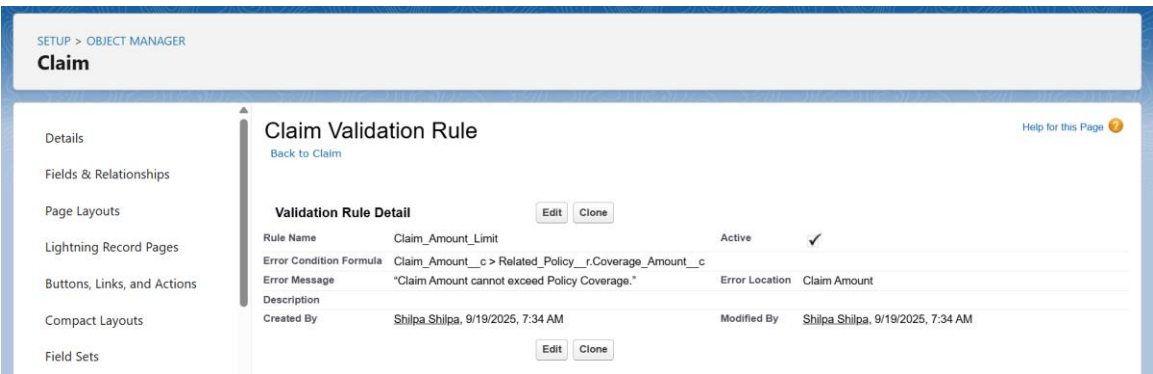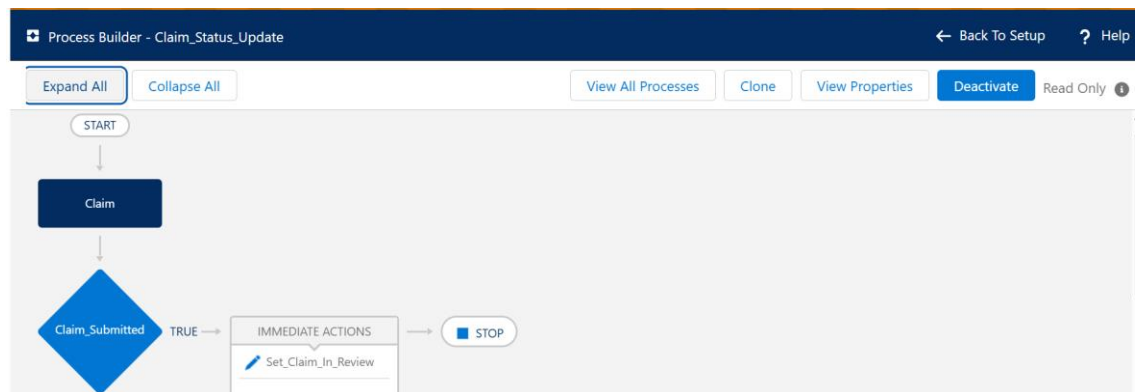

2. Workflow Rules

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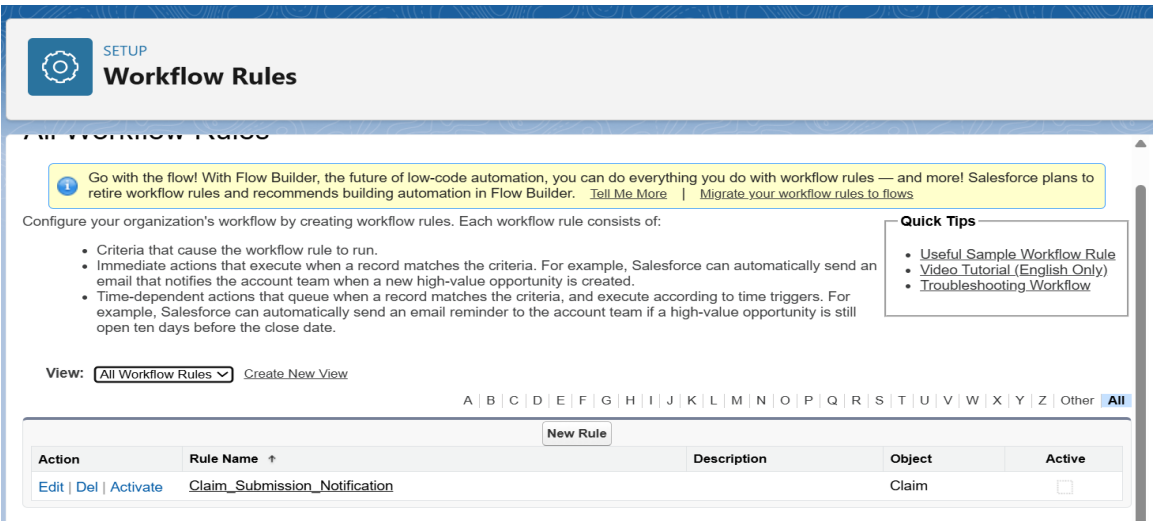
3. Process Builder

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.

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.
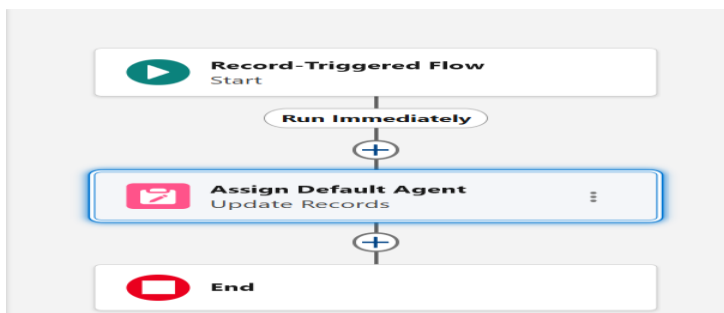
6. Email Alerts

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.