

# Phase 4: Process Automation

## TaskFlow Pro Project Management System

### Validation Rules Created

#### 1. Validate Task Dates

- Prevents due date before start date
- Error message displayed on save

#### 2. Budget Threshold Check

- Prevents exceeding budget by 10%
- Requires approval for overruns

### Approval Process

#### Milestone Approval

- Entry: Status = In Progress
- Approver: Project Manager
- Actions: Lock, update status, notify

### Workflows

#### Task Assignment Email

- Triggers when Assigned To changes
- Sends email notification

### Process Builder

#### Auto Update Project Status

- Updates based on task completion

### Scheduled Flow

#### Overdue Task Reminders

- Runs daily at 9 AM
- Emails assigned users

## Email Templates

1. Task Assignment
2. Approval Request
3. Status Change
4. Overdue Reminder