# Workflow Automation Project Template

## Step 1: Define workflow requirements and map the process

### 1.1. Flowchart of current process

Insert a screenshot or image of your flowchart here. Note: Use any tool (e.g., Google Drawings, Lucidchart, Visio) and annotate to show:

* Manual steps
* Problems or risks
* Potential automation points

### 1.2. Identified problems with manual steps

List common issues such as delays, data entry errors, or inefficiencies in the current process.

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### 1.3. Opportunities for automation or AI

Explain which steps could be improved or replaced with automation or AI and why.

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## Step 2: Select generative AI and automation tools

### 2.1. Selected generative AI tool

Name of tool, what it does, and how it will be used in your workflow.  
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### 2.2. Selected automation platform

Name of tool, what it does, and how it connects or automates the steps.

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### 2.3. Justification for tool choices (500 words or less)

Explain how each tool supports your goals, addresses specific problems, and works well together in the overall workflow.

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## Step 3: Design prompts for extracting and processing order details

### 3.1. Final data extraction prompt

Paste your completed prompt that asks the AI to extract key order details (e.g., name, product, quantity, shipping address).

### 3.2. Final order confirmation prompt

Paste your completed prompt for generating a customer confirmation email with the correct details and next steps.

### 3.3. Sample input

Include:

* A sample customer email used for testing

### 3.4. Testing and revision notes

Briefly describe any testing or changes you made to improve prompt clarity or output quality.

## Step 4: Build and configure the automated workflow

### 4.1. Screenshot of workflow setup

Insert a clear screenshot of your workflow as built in your automation platform.

## Step 5: Document and review the workflow

### 5.1. Final workflow summary

Summarize the complete process:

* What happens at each step

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* Which tools are used

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* How data flows through the system

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### 5.2. Annotated workflow screenshot

Include the same screenshot from Step 4, this time labeled or explained directly in the document.