

Phase 4: Process Automation

This phase focused on automating business-critical processes in the Insurance Claim & Policy Management System. Automation reduces manual effort, enforces business rules, ensures timely approvals, and maintains compliance. In insurance operations, timely claim approvals and notifications are crucial to maintain customer trust and operational efficiency.

1. Workflow Email Notifications for Claim Submission

Workflow rules in Salesforce are used to automate standard operational tasks. Email notifications are critical in insurance systems because delays in claim processing can frustrate customers and cause operational bottlenecks. By automatically notifying managers when an agent submits a claim, we ensure prompt attention without manual follow-up.

Implementation & Details:

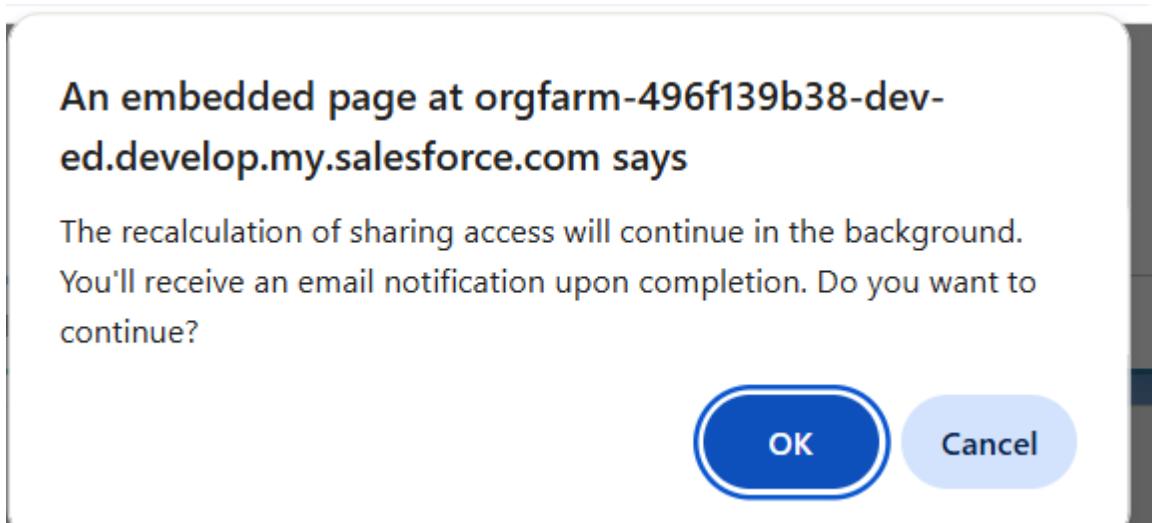
- Workflow rule triggers when Claim Status = Submitted.
- Email notifications are sent using a pre-designed template containing claim details.
- Managers are the recipients, enabling immediate review.

Benefits:

- **Time-saving:** Managers don't need to manually track new claims.
- **Transparency:** Each claim submission generates a traceable email notification.
- **Error Reduction:** Automated notifications minimize human error in communication.

Procedure:

1. Navigate to **Setup → Workflow Rules → Claim → New Rule.**
2. Define criteria: Claim Status = Submitted.
3. Add immediate workflow action: **Email Alert → choose template → assign Manager as recipient.**
4. Activate the workflow rule.



2. Approval Process for Claims

Approval Processes enforce a sequential validation of records before finalization. In insurance, this ensures that claims are verified against policies, coverage limits, and fraud checks. Multi-level approval also aligns with organizational hierarchy for accountability.

Implementation & Details:

- Agents submit claims, which cannot be edited until the approval process completes.
- Managers review and approve/reject claims.
- Admins have overall visibility to monitor approvals and intervene if required.

Benefits:

- **Structured Validation:** Each claim passes through defined checks before final approval.
- **Audit Trail:** Salesforce automatically logs all approval/rejection actions.
- **Data Integrity:** Locked records prevent unauthorized changes.
- **Compliance:** Supports regulatory requirements by maintaining a proper approval workflow.

Procedure:

1. Navigate to **Setup → Approval Processes → Claim → New Approval Process**.
 2. Define entry criteria: Claim Status = Submitted.
 3. Specify initial submitters (Agents) and approvers (Managers).
 4. Configure automated emails for submission, approval, and rejection.
 5. Activate the process.
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3. Claim Approved Notification – Email Template

The Claim Approved Notification is a Salesforce Classic Email Template designed to automatically inform customers when their insurance claim has been successfully approved. It enhances communication efficiency and ensures customers receive immediate updates without manual intervention.

Purpose:

- To notify customers automatically after their claim approval.
- To improve transparency and customer satisfaction by keeping them informed at every stage of claim processing.
- To reduce manual workload for insurance agents and ensure consistent communication.

Template Details:

Field	Description
Template Name	Claim Approved Notification
Subject	<i>Your Claim Has Been Approved</i>
Available For Use	<input checked="" type="checkbox"/> Checked
Encoding	Unicode (UTF-8)
Created & Modified By	Mounika
Type	Text-based Email Template
Folder	Unfiled Public Classic Email Templates

Email Body (Content):

Dear Customer,

Your claim for policy number {!Claim__c.Name} has been approved.

Claim Amount: {!Claim__c.Amount__c}

Status: {!Claim__c.Status__c}

Thank you,

Insurance Policy Automation Team

The screenshot shows the 'Email Template Detail' page for the 'Claim Approved Notification' template. The top navigation bar includes 'SETUP' and the 'Classic Email Templates' icon. The main section displays the template details:

- Email Templates from Salesforce: Unfiled Public Classic Email Templates
- Email Template Name: Claim Approved Notification
- Template Unique Name: Claim_Approved_Notification
- Encoding: Unicode (UTF-8)
- Author: Mounika [Change]
- Description:
- Created By: Mounika, 11/5/2025, 2:34 AM
- Modified By: Mounika, 11/5/2025, 6:41 PM
- Available For Use:
- Last Used Date:
- Times Used:

Below the details is a 'Send Test and Verify Merge Fields' button. The 'Email Template' section contains the plain text preview:

```

Subject | Your Claim Has Been Approved
Plain Text Preview
Dear Customer,
Your claim for policy number {!Claim__c.Name} has been approved.
Claim Amount: {!Claim__c.Amount__c}
Status: {!Claim__c.Status__c}

Thank you,
Insurance Policy Automation Team

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