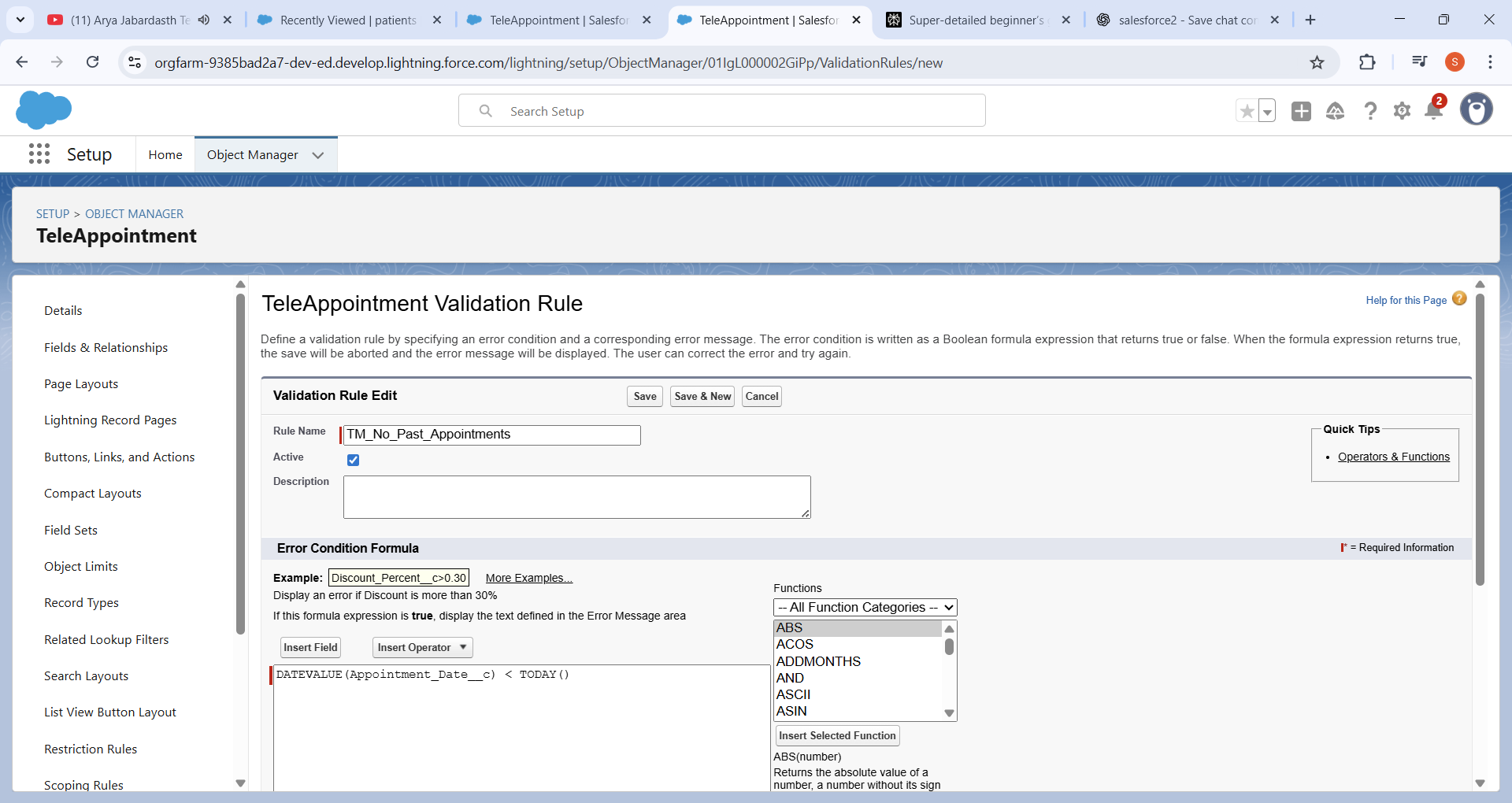
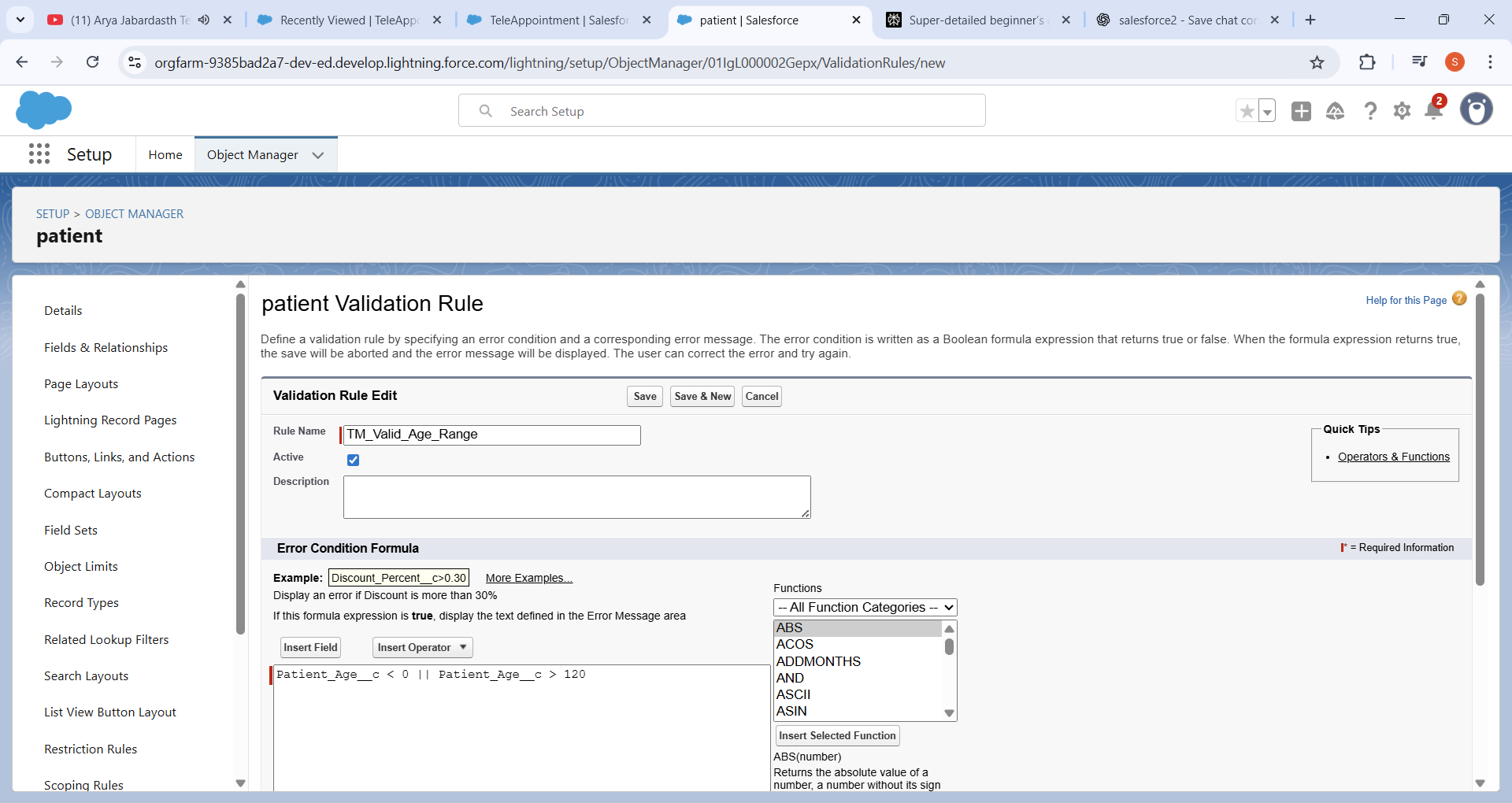
**Phase 4: Process Automation (Admin)**

**1.Validation rule:**

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**Validation Rules**

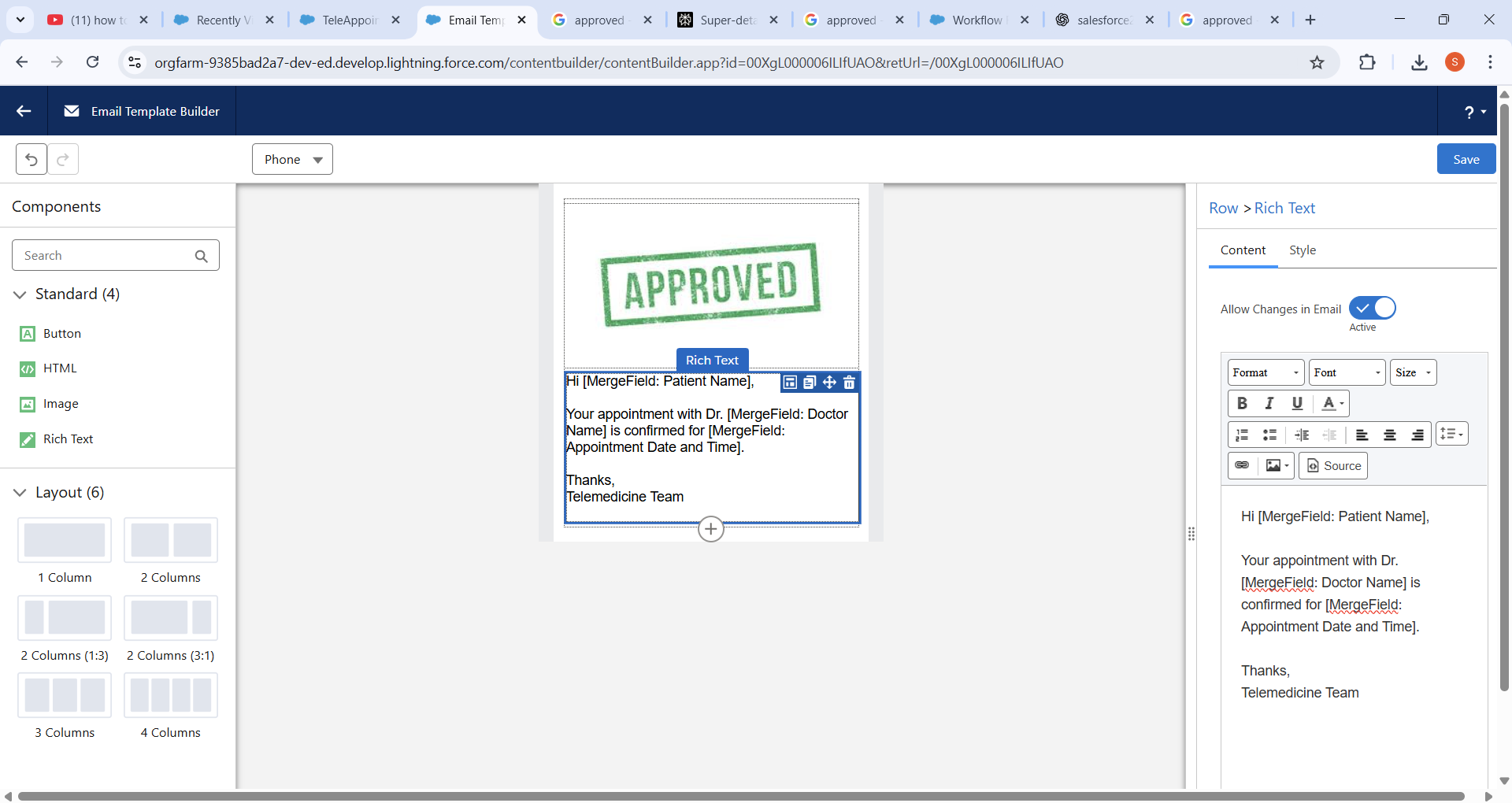
A validation rule is a simple way to **prevent bad data from being saved**. It checks a record before it's saved and, if the rule is true, it displays an error message.

* **TM\_No\_Past\_Appointments**: This rule prevents a user from creating a TeleAppointment with a date that is in the past. It uses the formula

DATEVALUE(Appointment\_Date\_\_c) < TODAY().

* **TM\_Valid\_Age\_Range**: This rule ensures a Patient's age is within a valid range. It uses the formula Patient\_Age\_\_c < 0 || Patient\_Age\_\_c > 120.

**2.Lightning Email Template:**

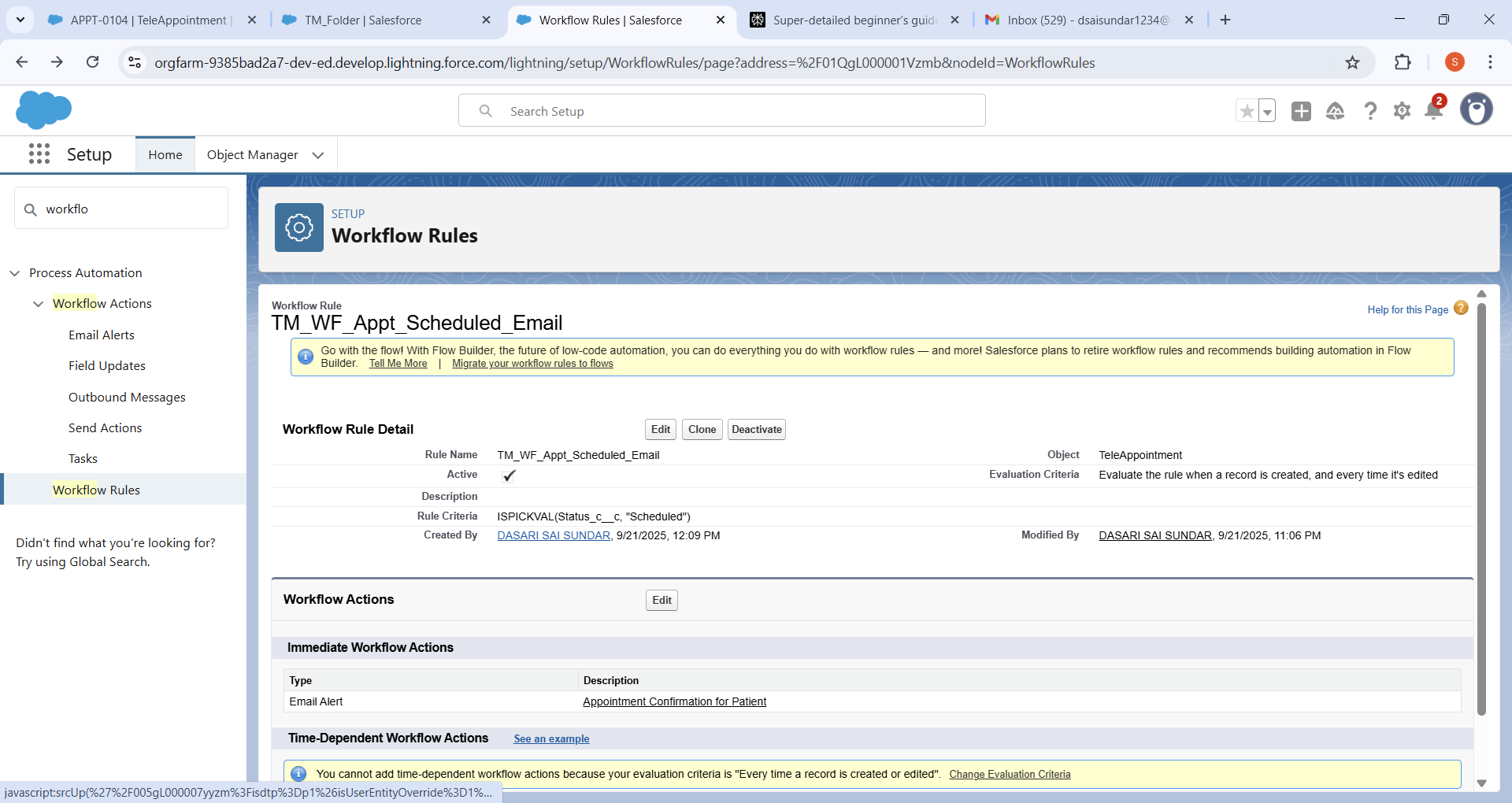


The email template is created with the above structure.

The email that gets sent uses a

**Lightning Email Template**, which includes an "APPROVED" stamp and merge fields for the Patient Name, Doctor Name, and Appointment Date and Time.

**4.Workflow Rules Validation:**

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Created The TM\_WF\_Appt\_Scheduled\_Email

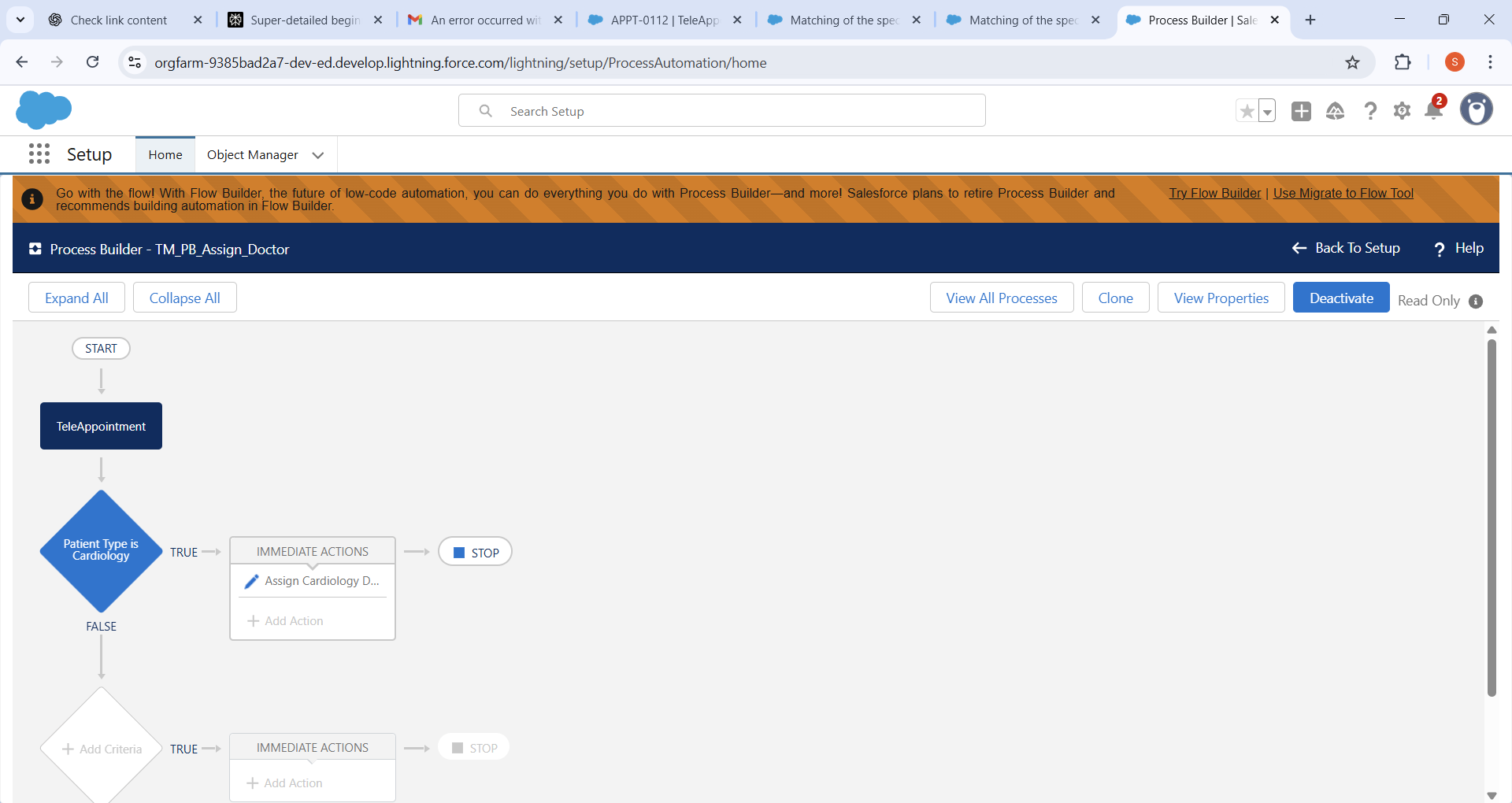
A Workflow Rule is a tool that performs an action when a record meets a specific criteria.

* TM\_WF\_Appt\_Scheduled\_Email: This rule automatically sends an email to the patient when a TeleAppointment's status is set to "Scheduled."
* The email that gets sent uses a

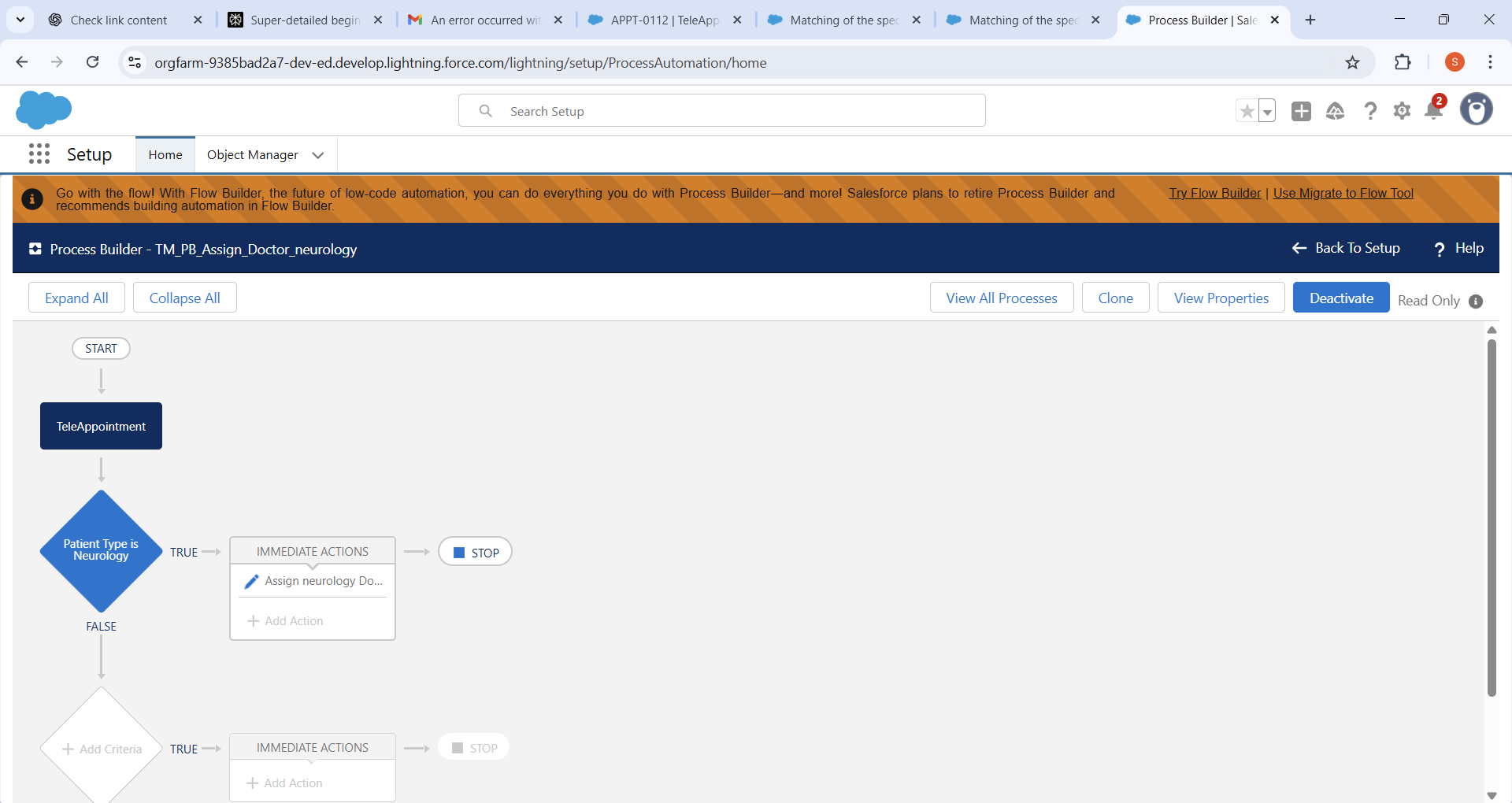
Lightning Email Template which includes an "APPROVED" stamp and merge fields for the Patient Name, Doctor Name, and Appointment Date and Time.

**6.Process Builder:**

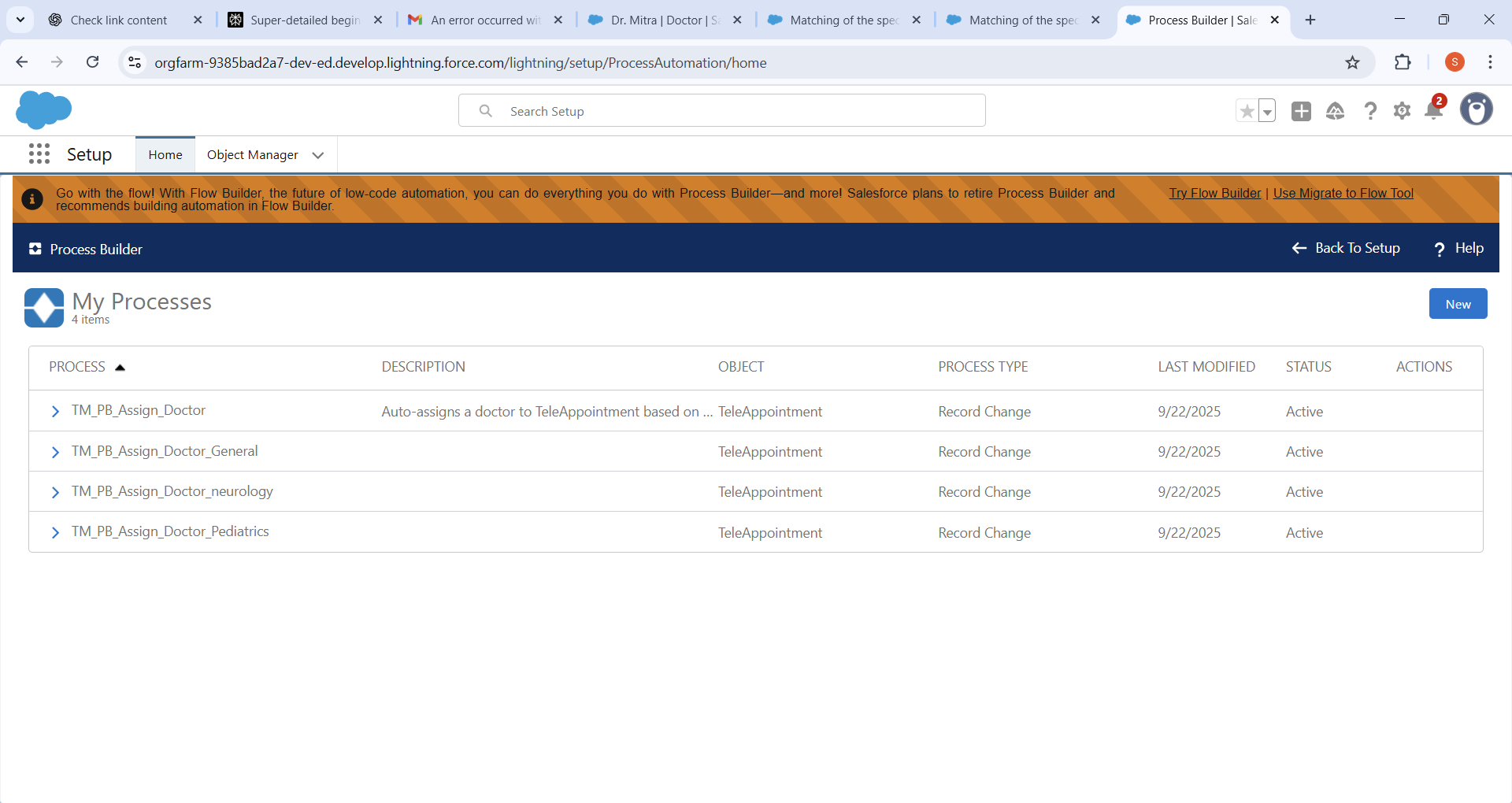
In TeleAppointment Object when we select speciality we can get assigned the doctor according to the specialization.

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Here for the cardiology assigned doctor can be allocated.



Here for the cardiology assigned doctor can be allocated.



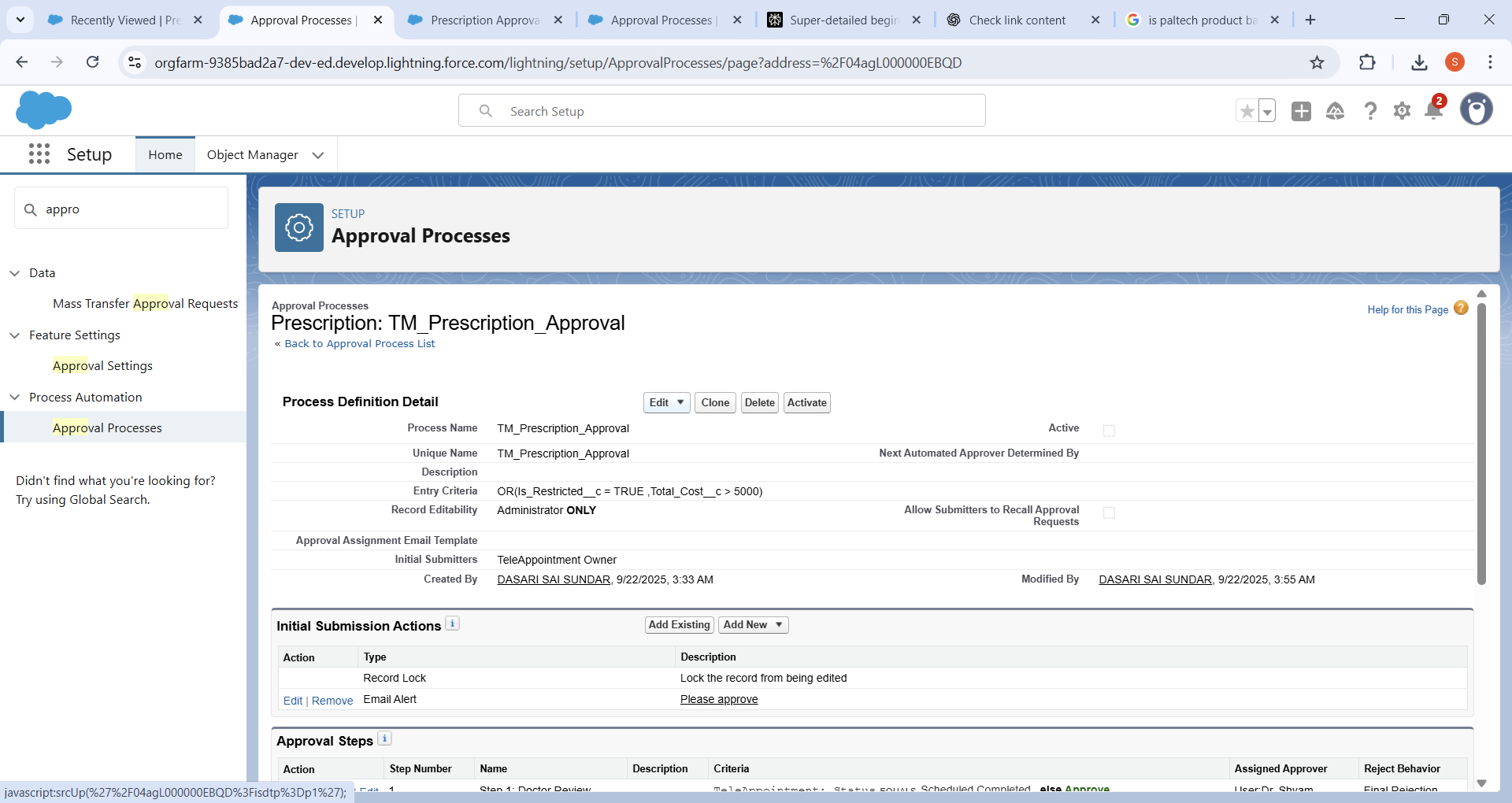
Same as the General and Pediatrics doctor can be allocated accordingly.

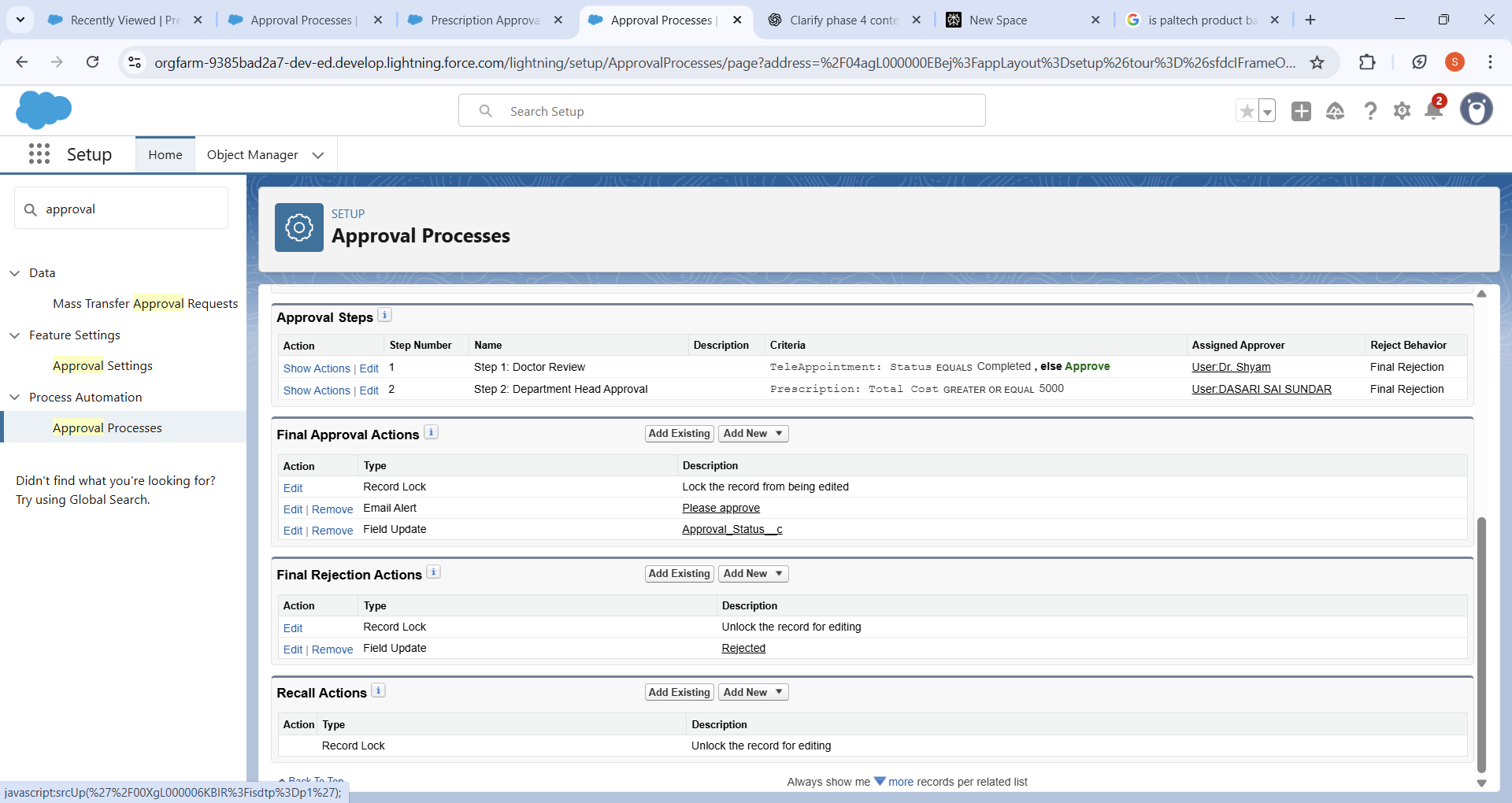
**Process Builder** is a powerful tool for automating business processes using a visual interface. It works by checking criteria and then performing immediate actions.

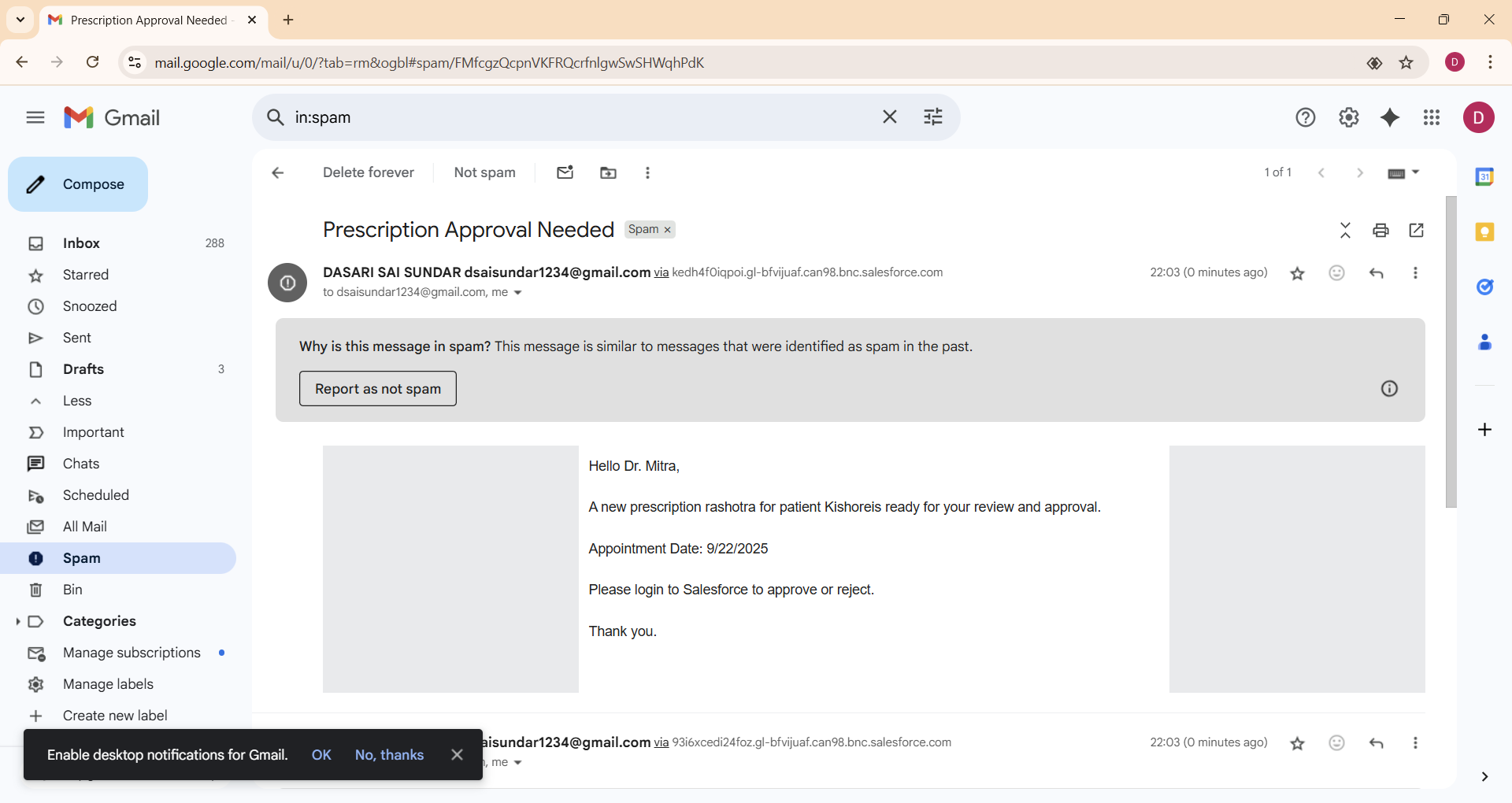
* **Assigning a Doctor**: You have created a Process Builder that automatically assigns a doctor to a TeleAppointment record based on the patient's selected specialty.
* For example, if the

Patient Type is 'Cardiology', a specific Cardiology doctor is assigned. Similarly, doctors are allocated for 'Neurology', 'General', and 'Pediatrics' specialties.

**7.Approval Process:**

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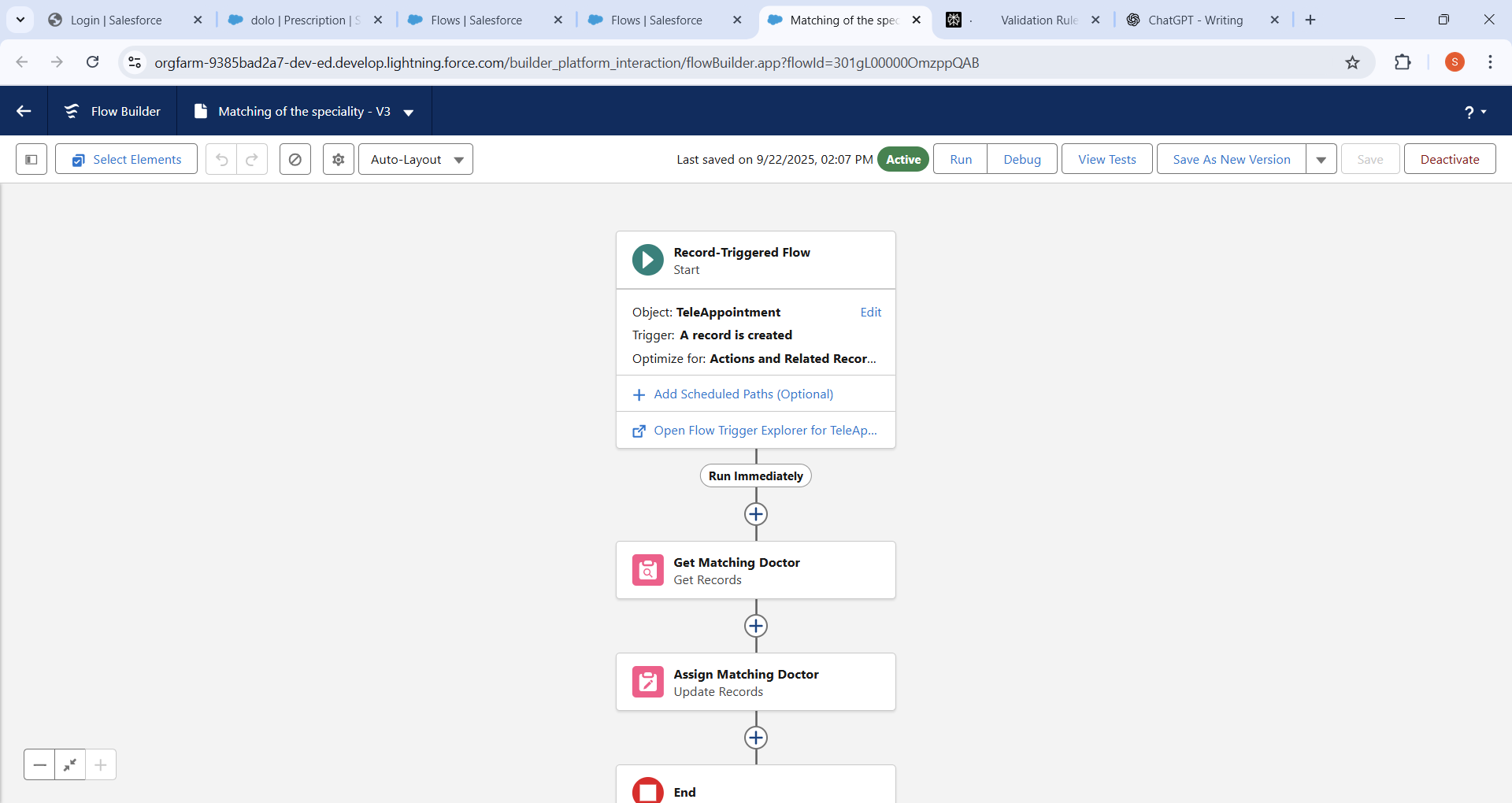
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**Approval Process**

An Approval Process is used when you need to get formal permission before a record is finalized.

* **TM\_Prescription\_Approval**: This process is for approving prescriptions. It's triggered when a prescription is restricted or the total cost is over $5,000.
* The approval process has two steps: a "Doctor Review" and a "Department Head Approval."
* When a record is submitted for approval, an email is sent to the assigned approvers to notify them.

**8.Flows:**

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Flow is a visual automation tool that can perform everything a Process Builder or Workflow Rule can, and much more.

* You have a

Record-Triggered Flow on the TeleAppointment object that runs when a new record is created.

* This Flow gets a matching doctor record from the database and assigns them to the appointment, which is a modern way to perform the same task as your Process Builder.