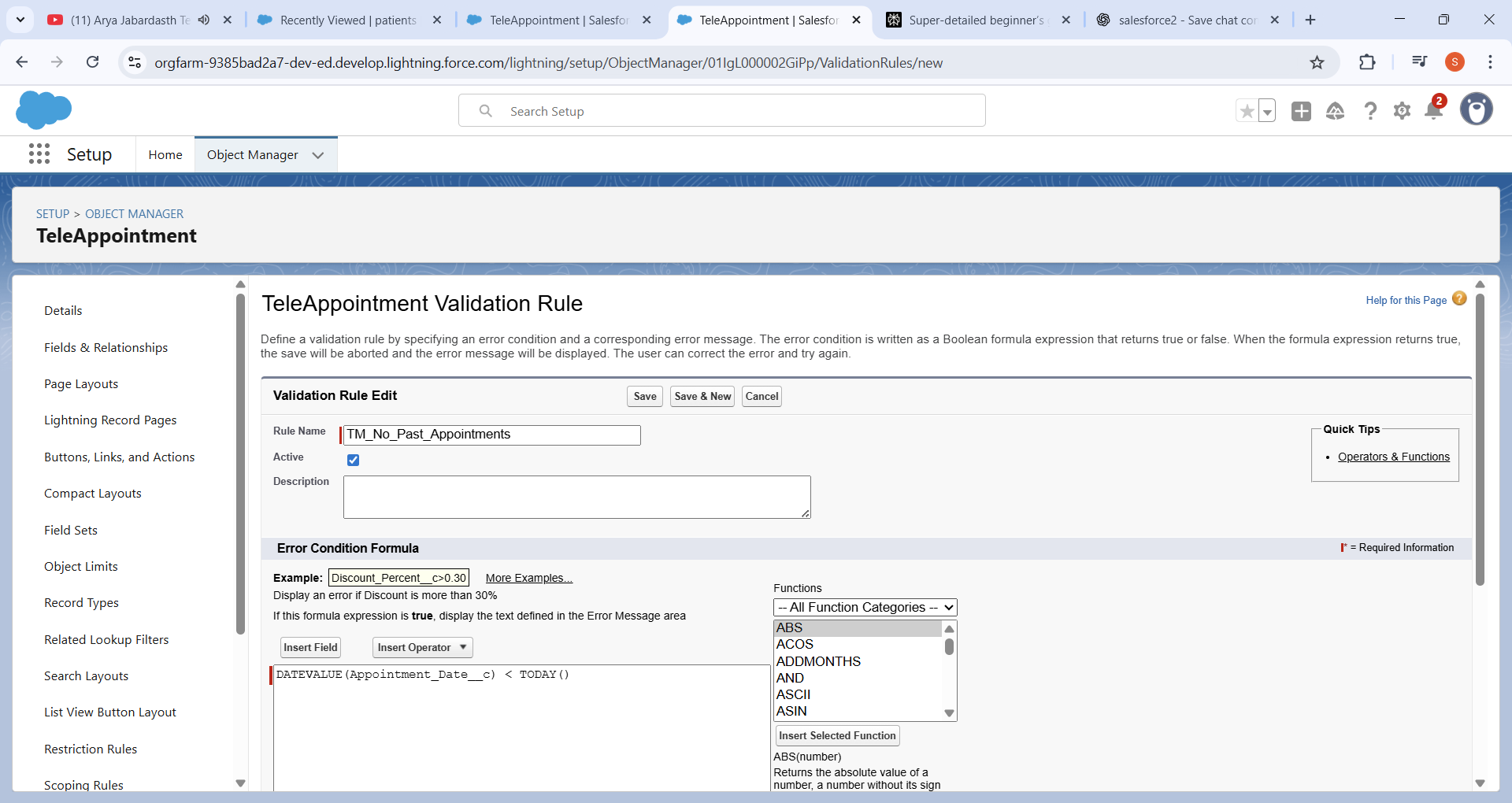
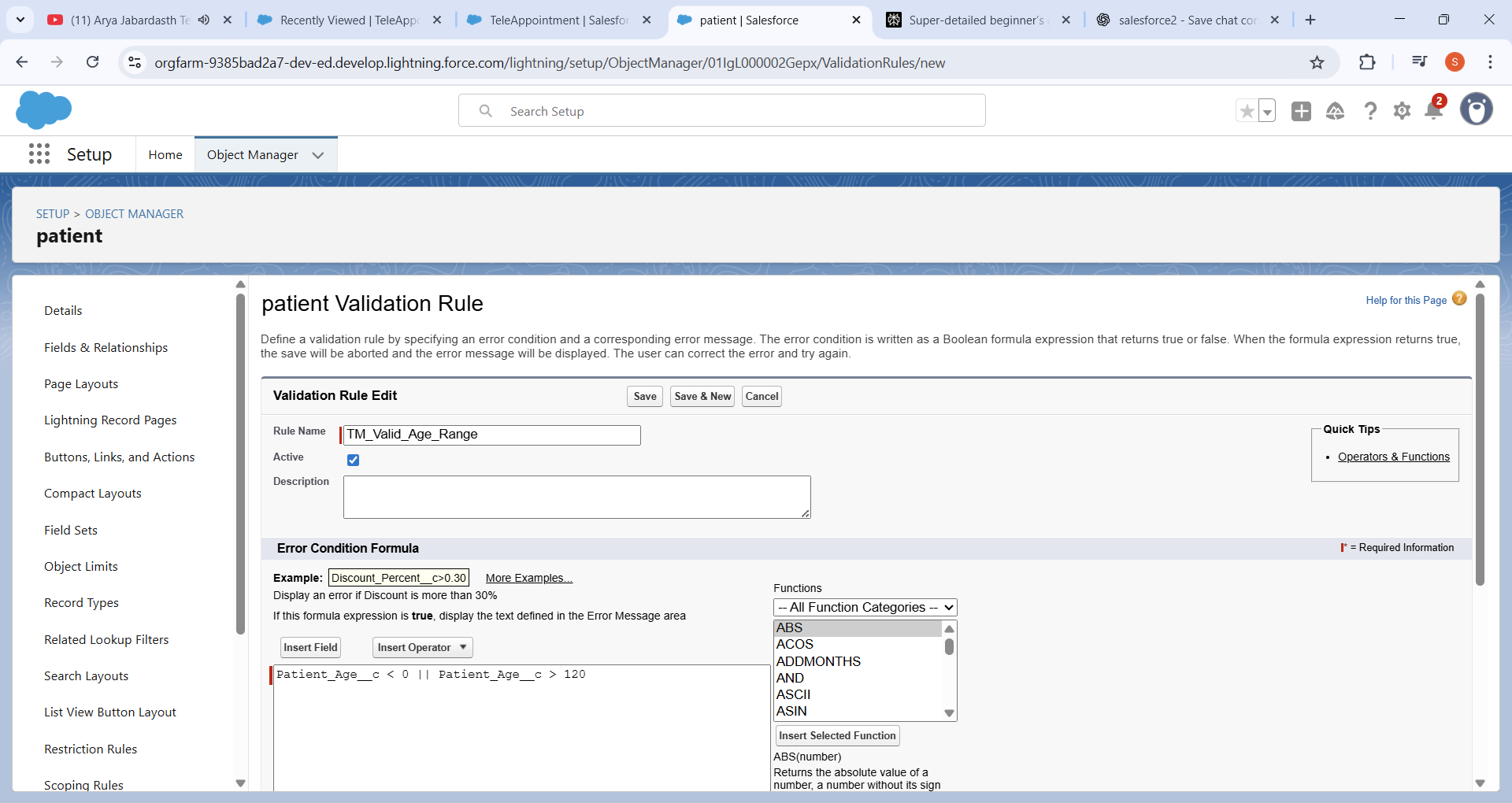
**Phase 4: Process Automation (Admin)**

**1.Validation rule:**

1. No Past Appointments:

****

1. Patient Valid Age Range:



**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.

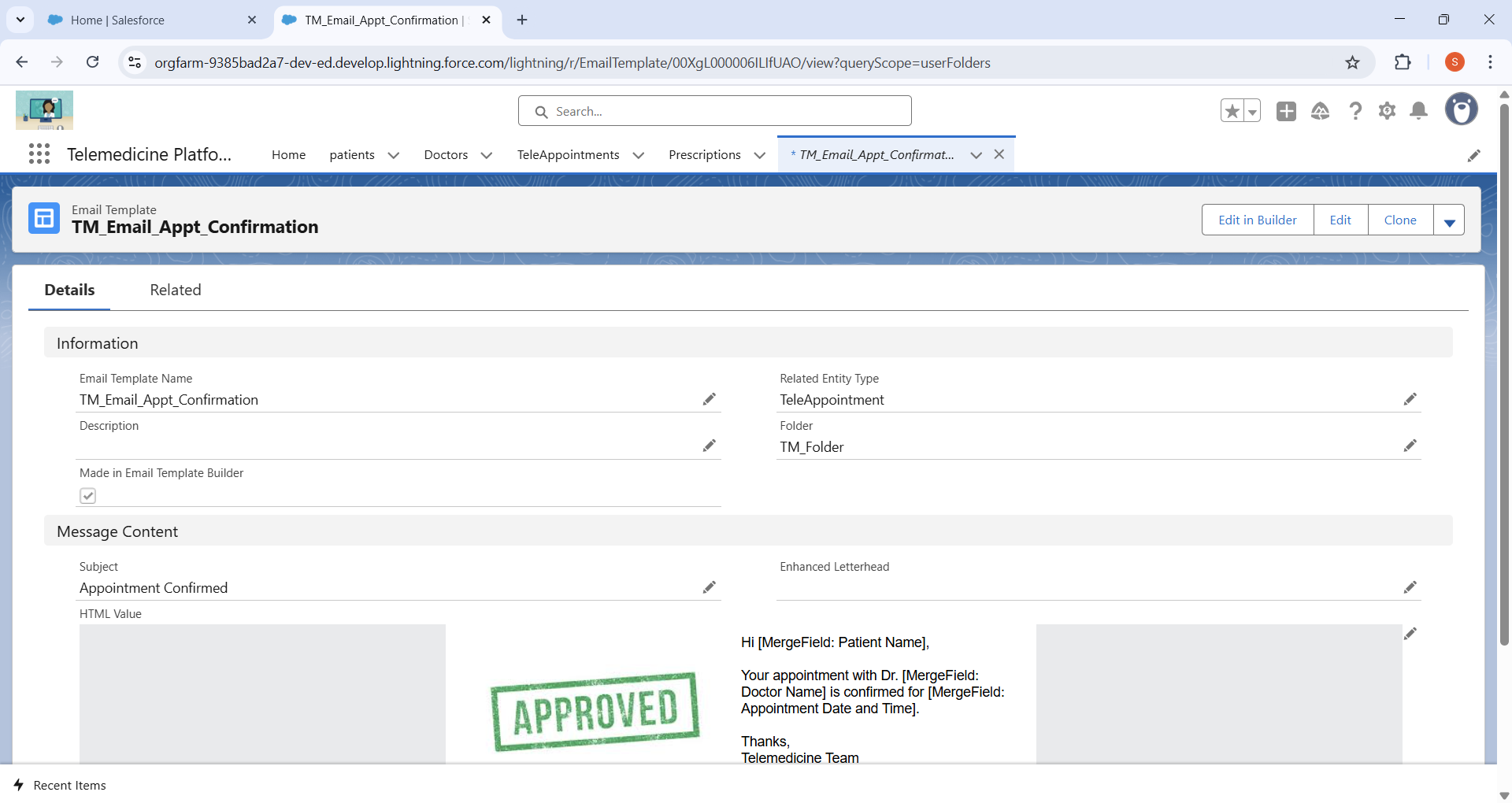
* **TM\_No\_Past\_Appointments**: This rule prevents a user from creating a TeleAppointment with a date that is in the past. It uses the formula

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

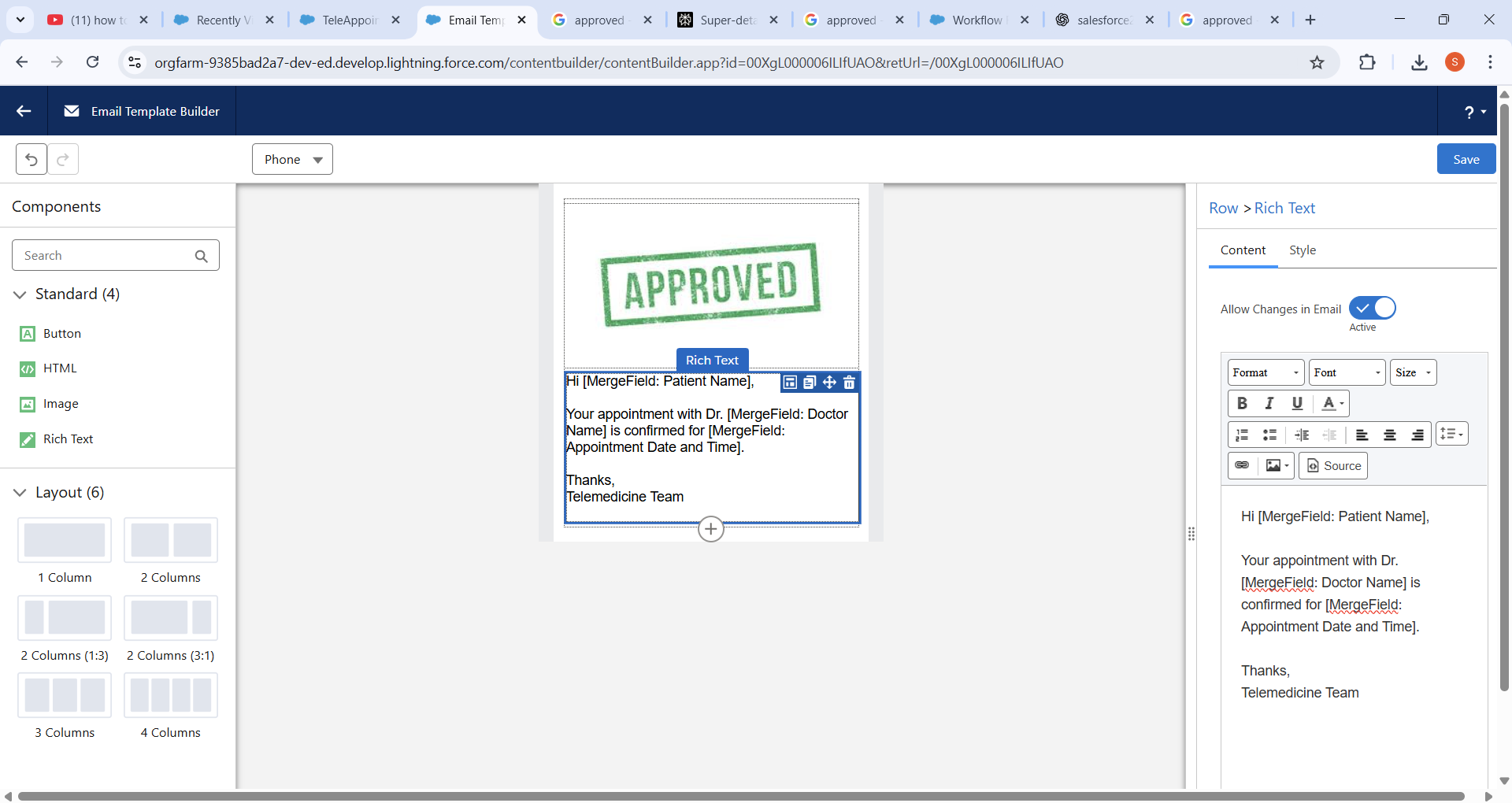
* **TM\_Valid\_Age\_Range**: This rule ensures a Patient's age is within a valid range. It uses the formula Patient\_Age\_\_c < 0 || Patient\_Age\_\_c > 120.

**2.Lightning Email Template:**

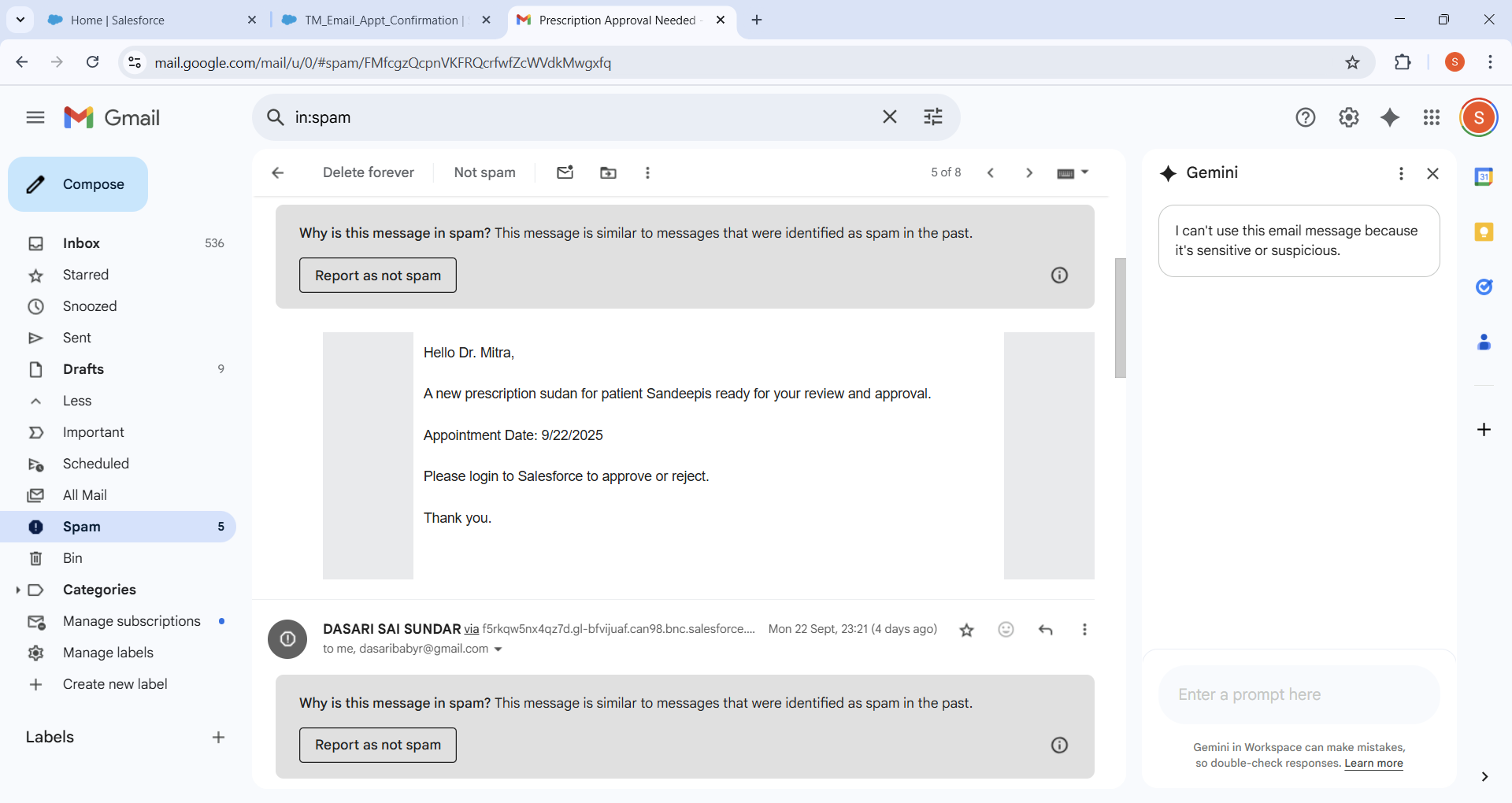
1. Created lightning Email Template🡪Email Appointment confirmation:

****

1. Design the Email Template with the builder:



1. Test Case1:

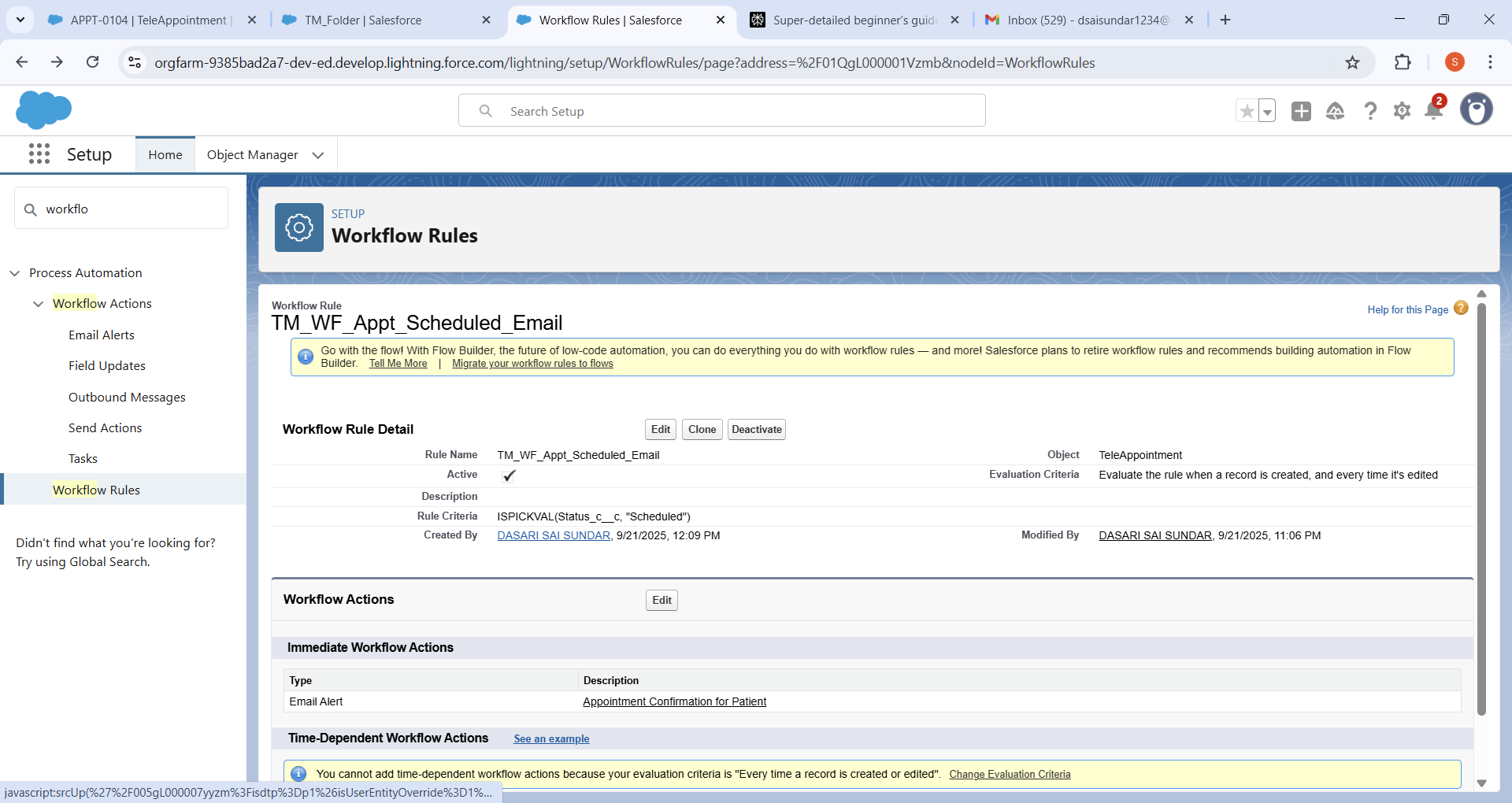
****

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:**

****

Created The TM\_WF\_Appt\_Scheduled\_Email

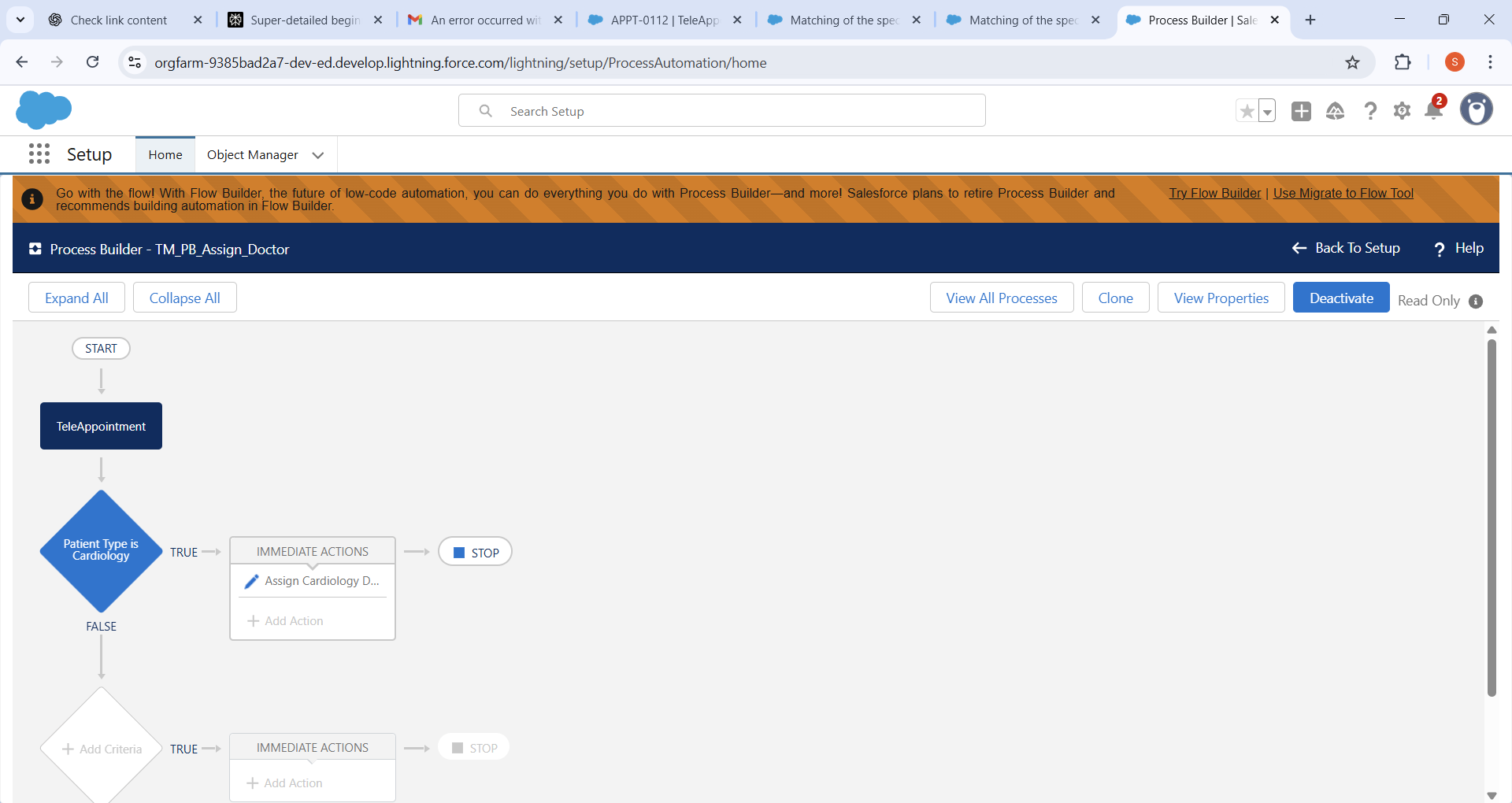
A Workflow Rule is a tool that performs an action when a record meets a specific criteria.

* 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

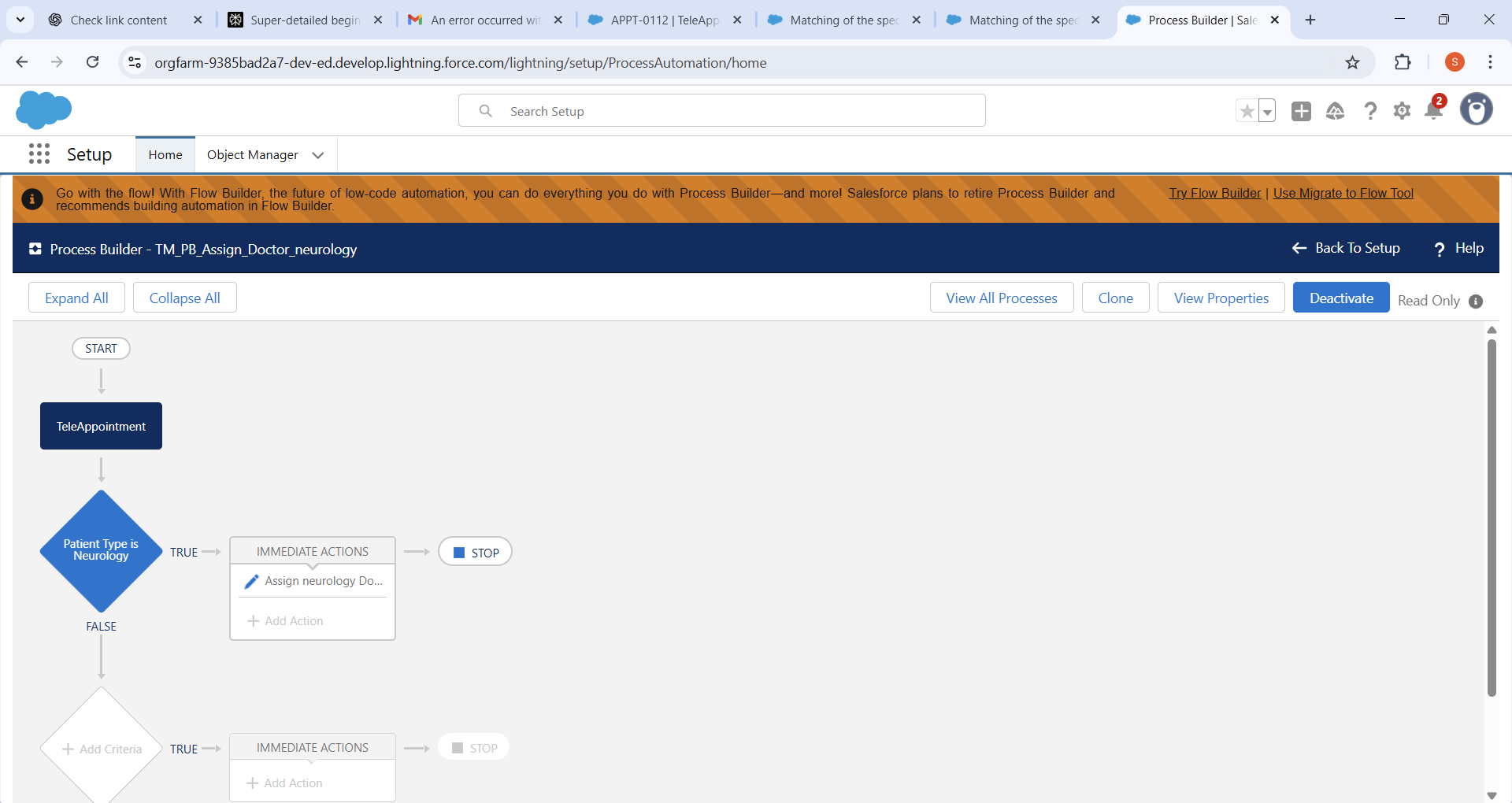
Lightning Email Template which includes an "APPROVED" stamp and merge fields for the Patient Name, Doctor Name, and Appointment Date and Time.

**6.Process Builder:**

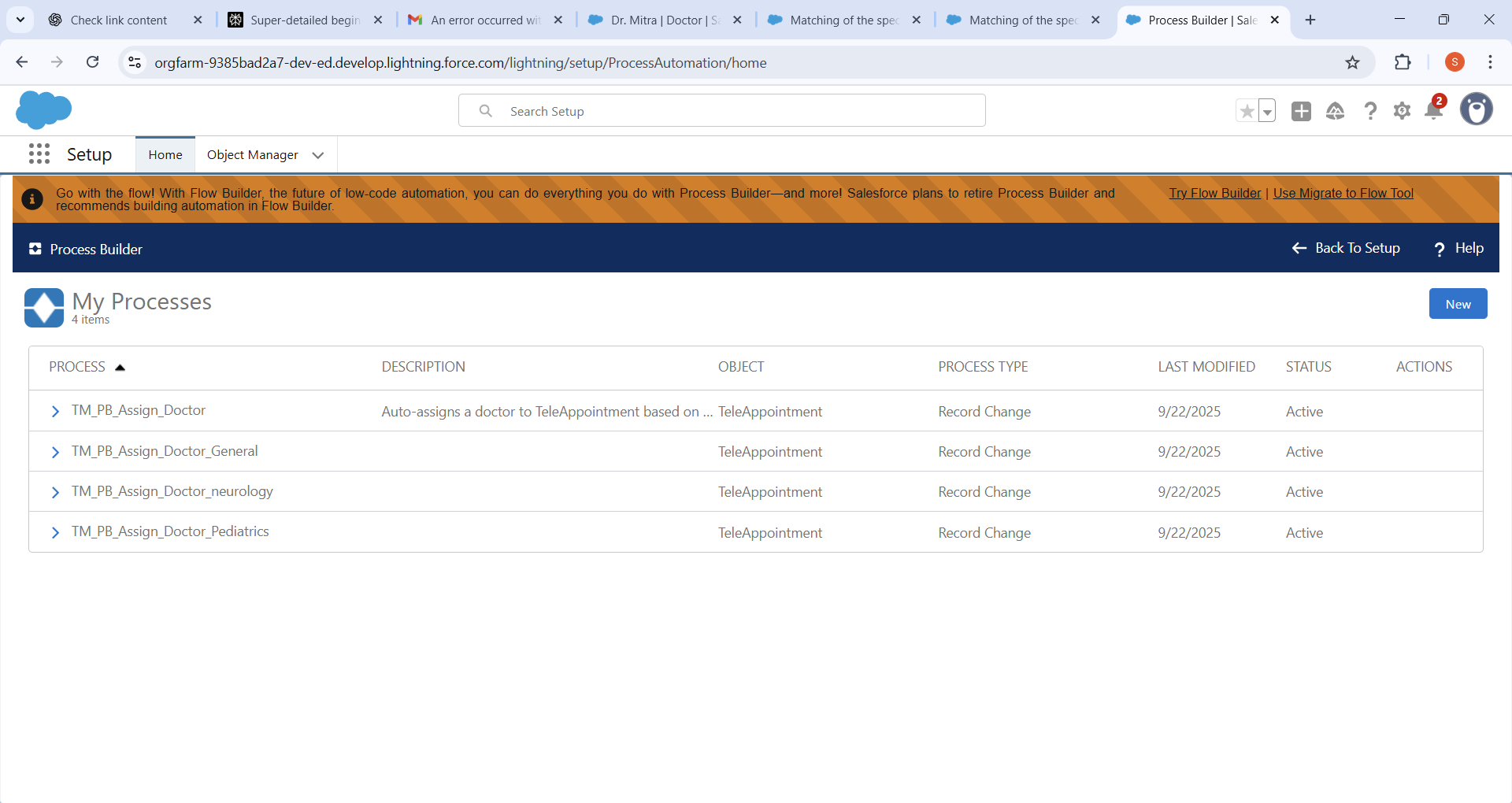
In TeleAppointment Object when we select speciality we can get assigned the doctor according to the specialization.

****

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.

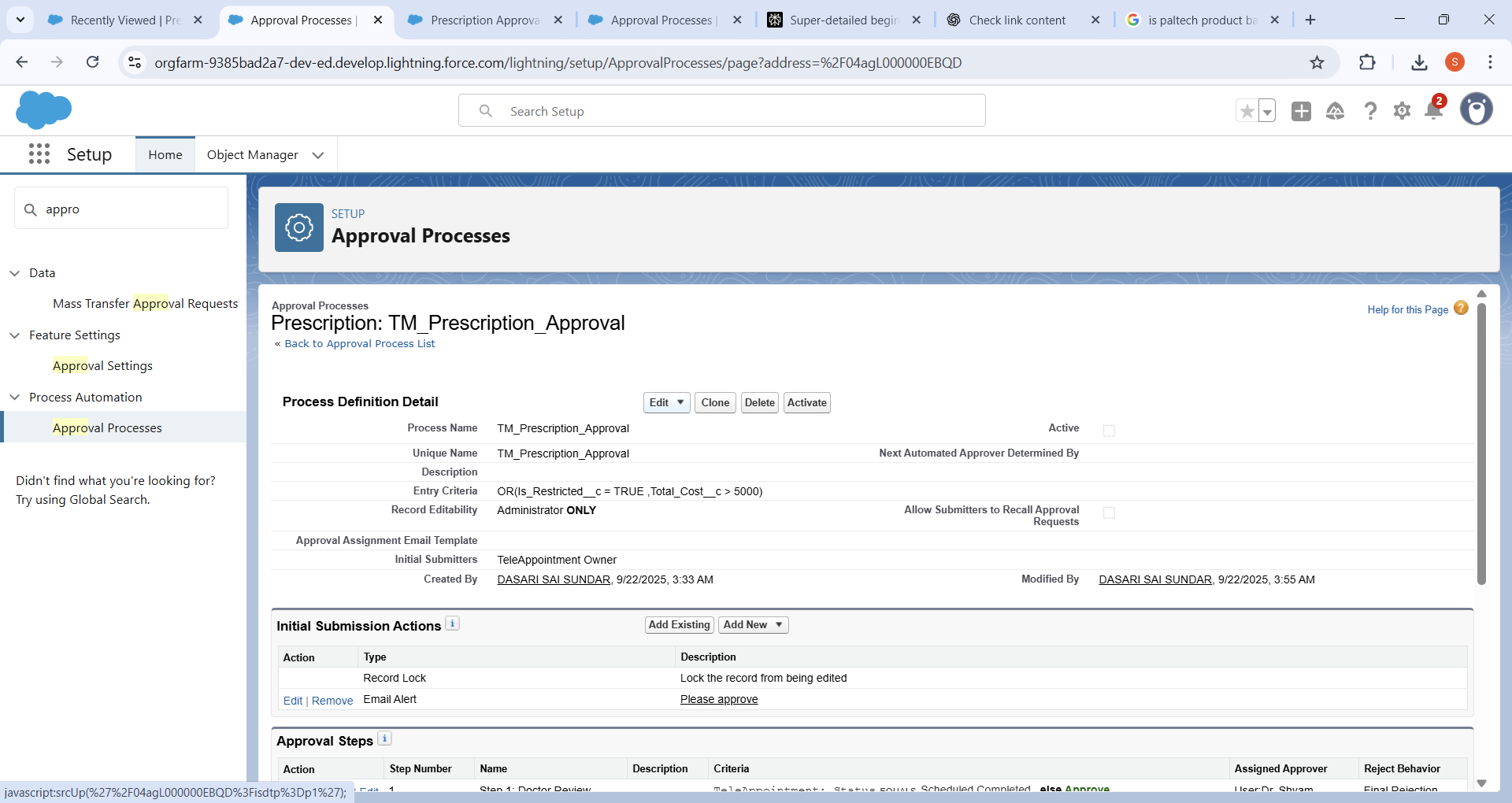
**Process Builder** is a powerful tool for automating business processes using a visual interface. It works by checking criteria and then performing immediate actions.

* **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.

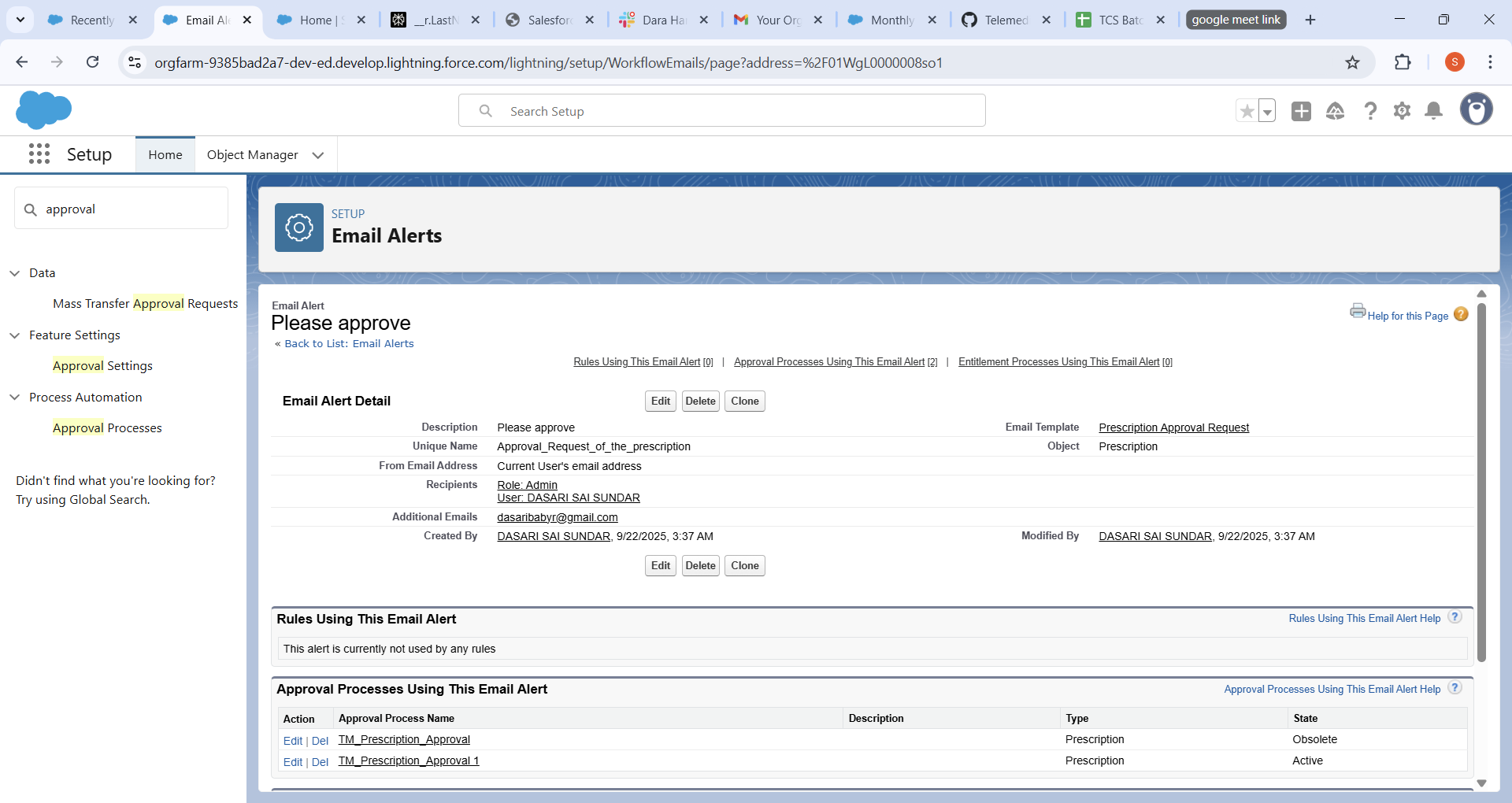
**7.Approval Process:**

1. Created the Approval Process:

****

1. Initial Submission Action:

* Email Alert alert is created with the name Please Approve

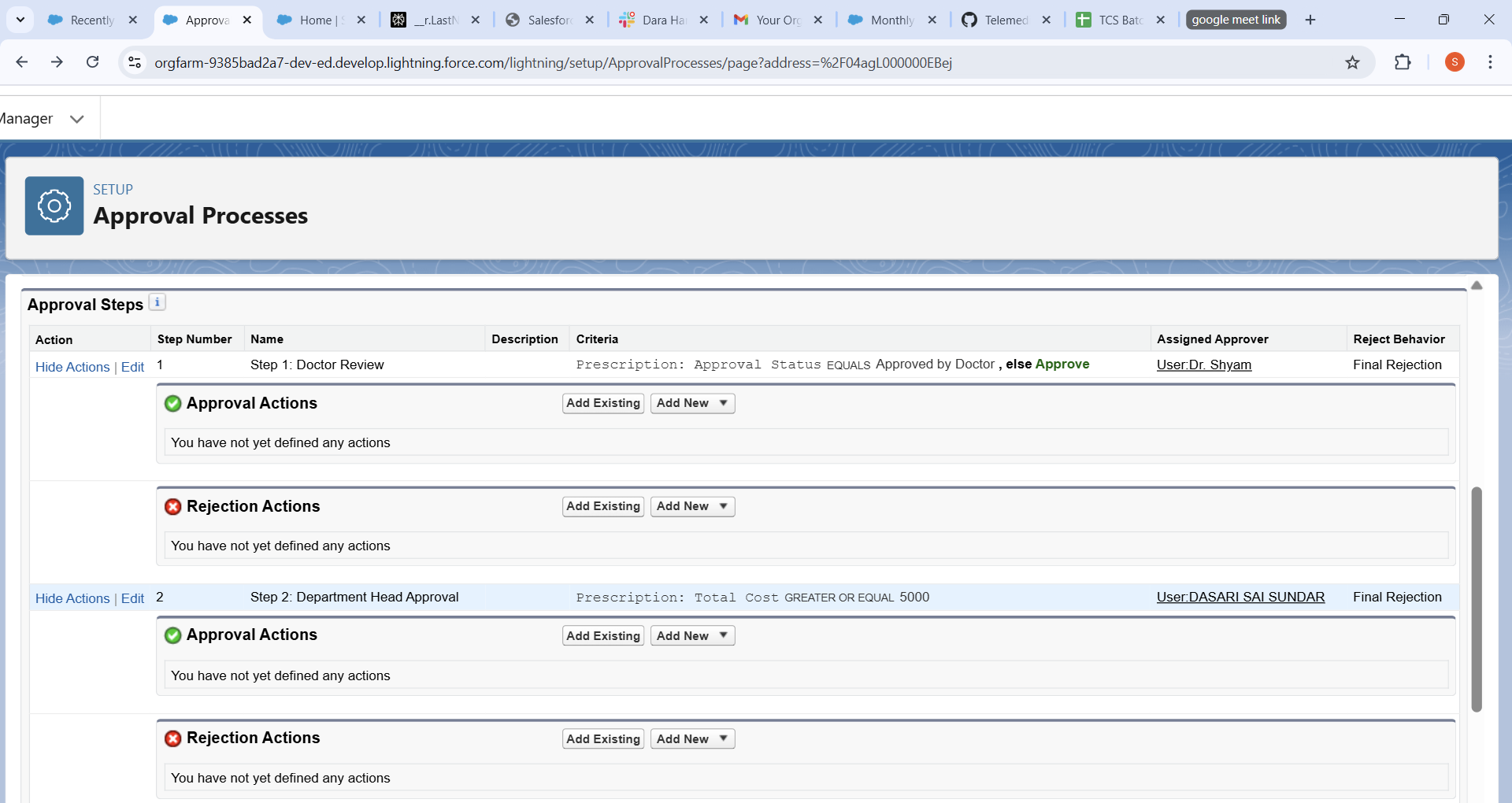


1. Approval Steps:

* Two approval steps created with names 1.Doctor Review ,2.Department head Approval

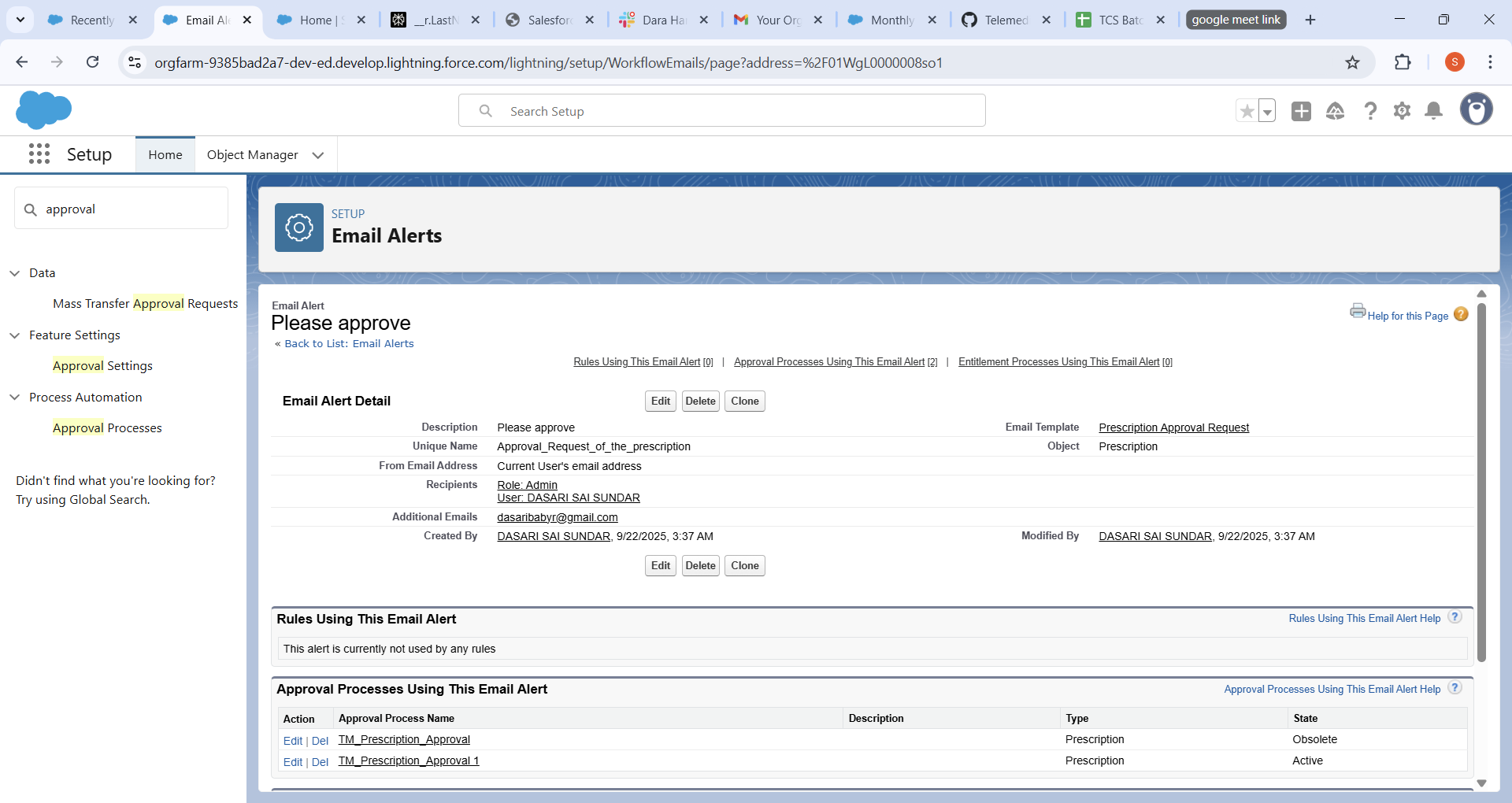
Formula-1: Prescription: Approval StatusequalsApproved by Doctor **, else Approve**

Formula-2: Prescription: Total Costgreater or equal5000

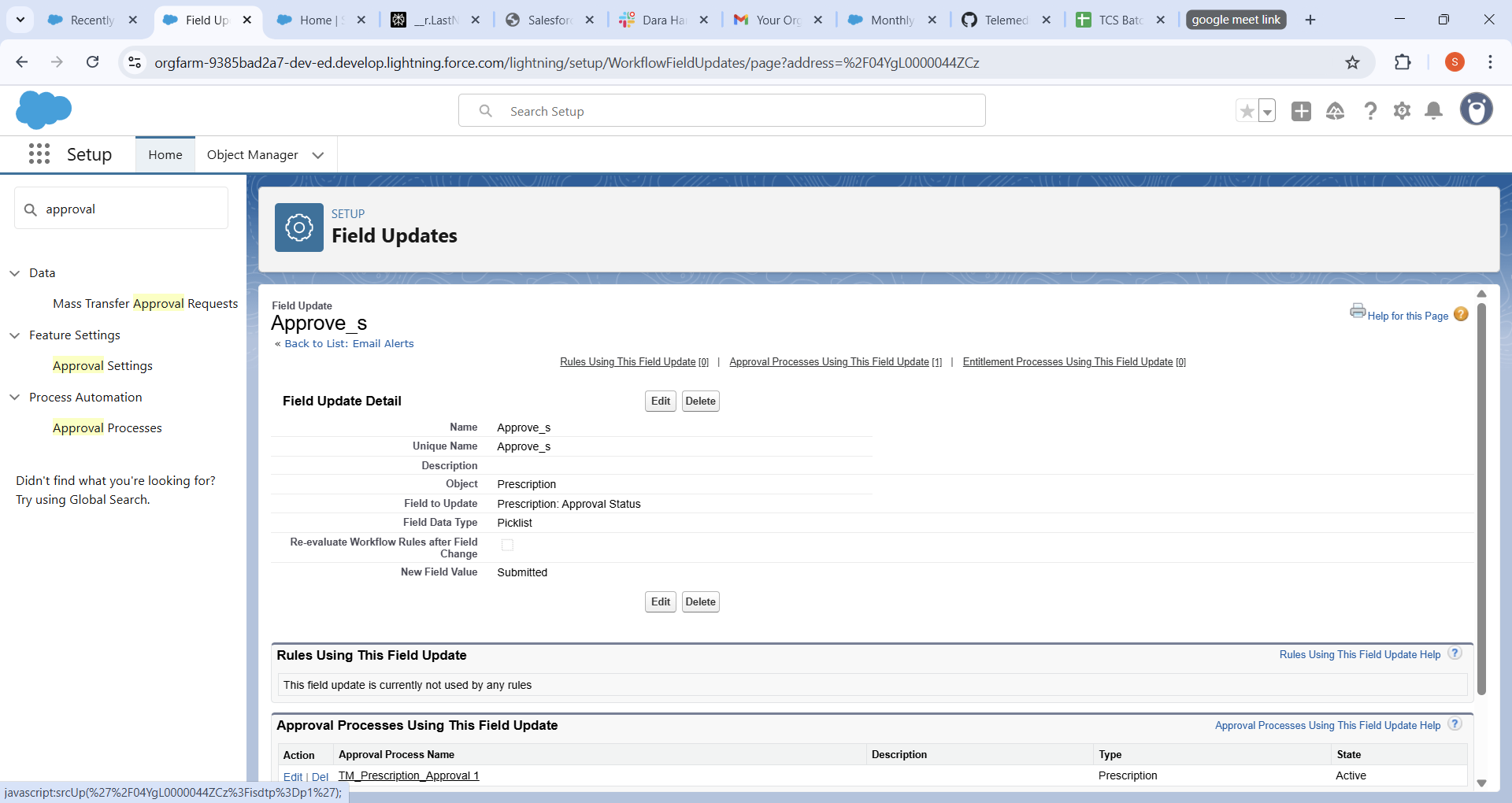


1. Final Approval Action:

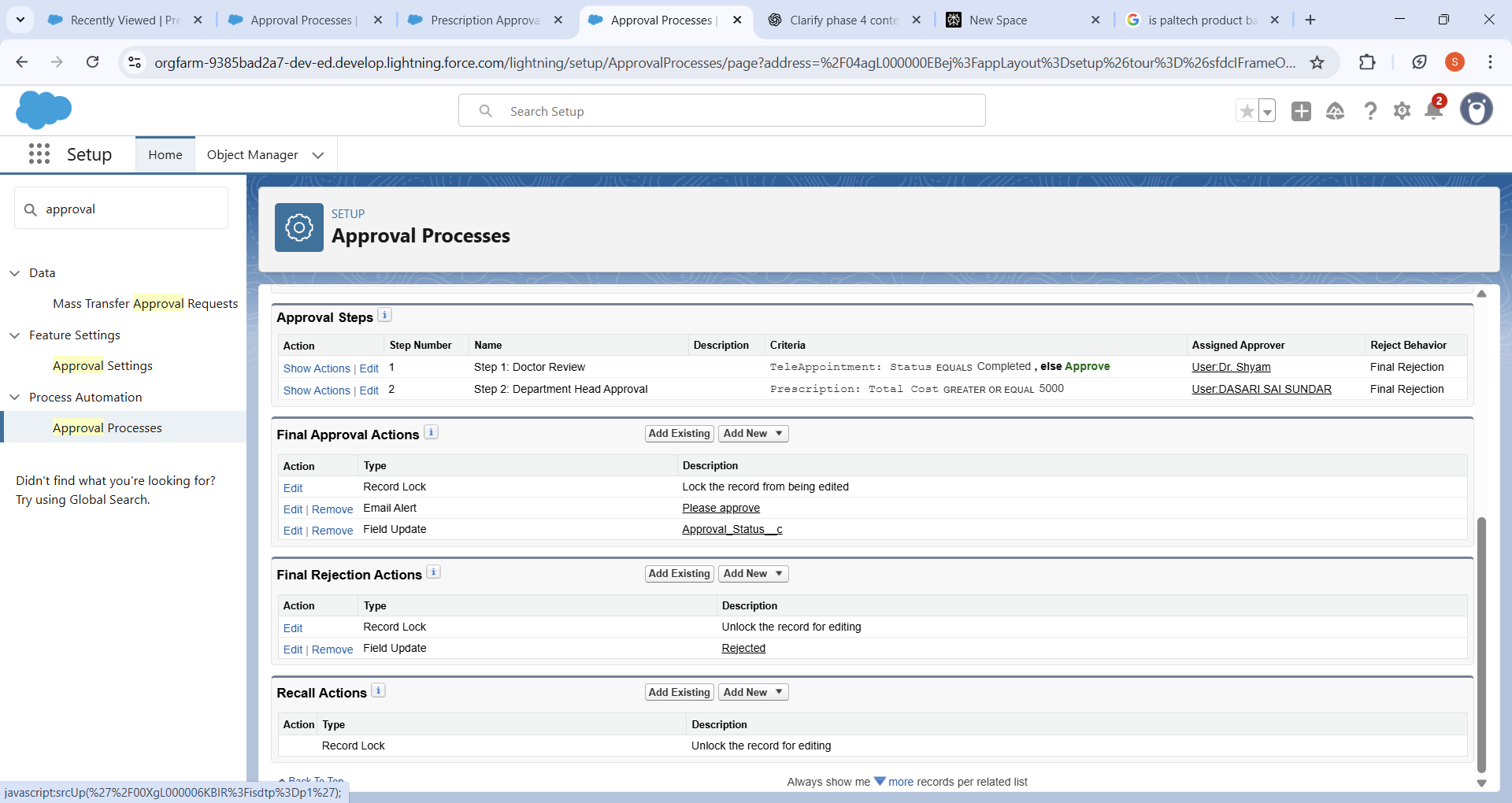
* Created the Please Approve



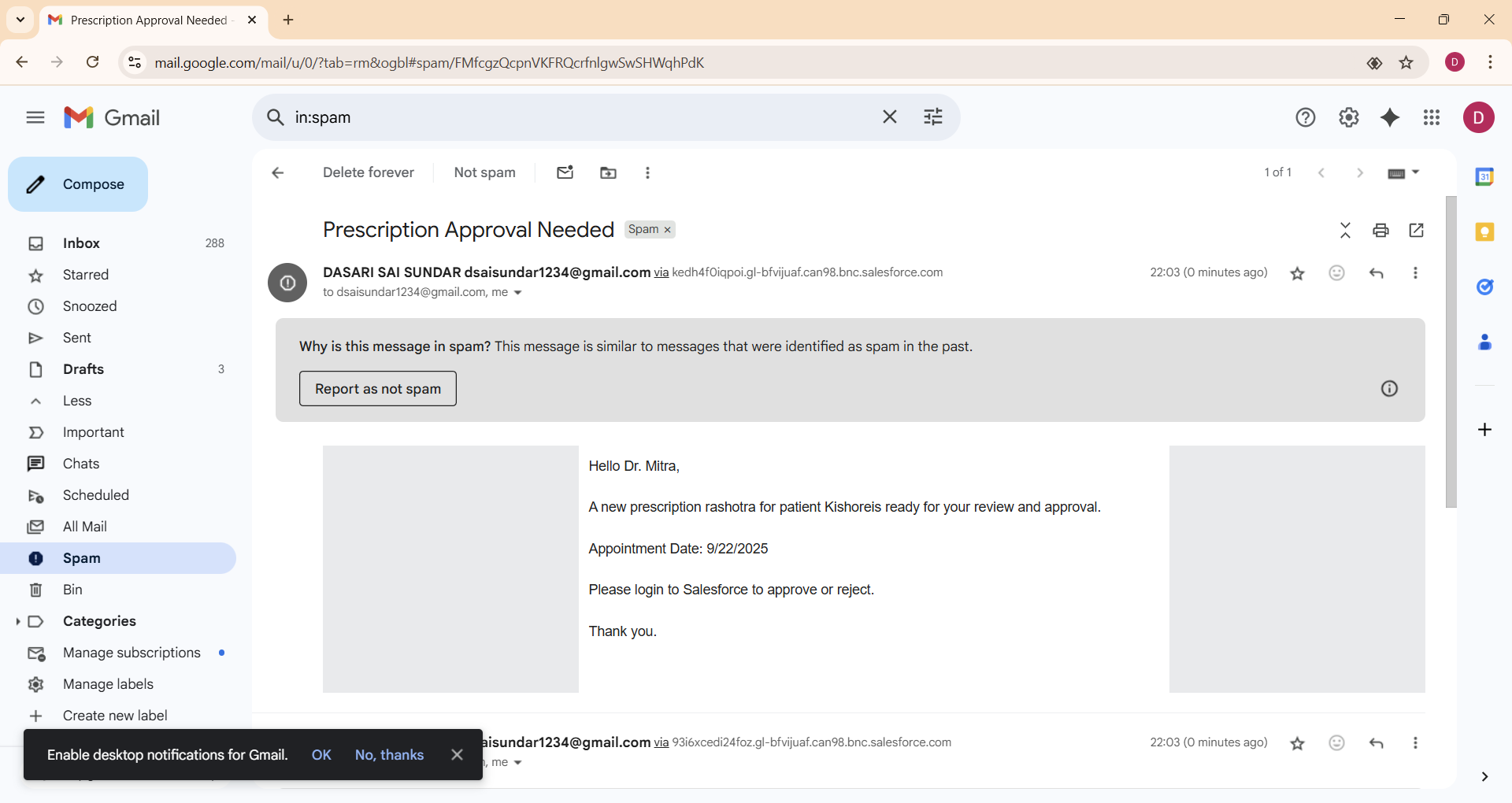
* A field update created in the Final Approval process



As same final Rejection also Created with the Rejected Named Field Update.

****

1. Finally check the Approval process in the doctor page and approved the new prescription is Directly sent to mail.

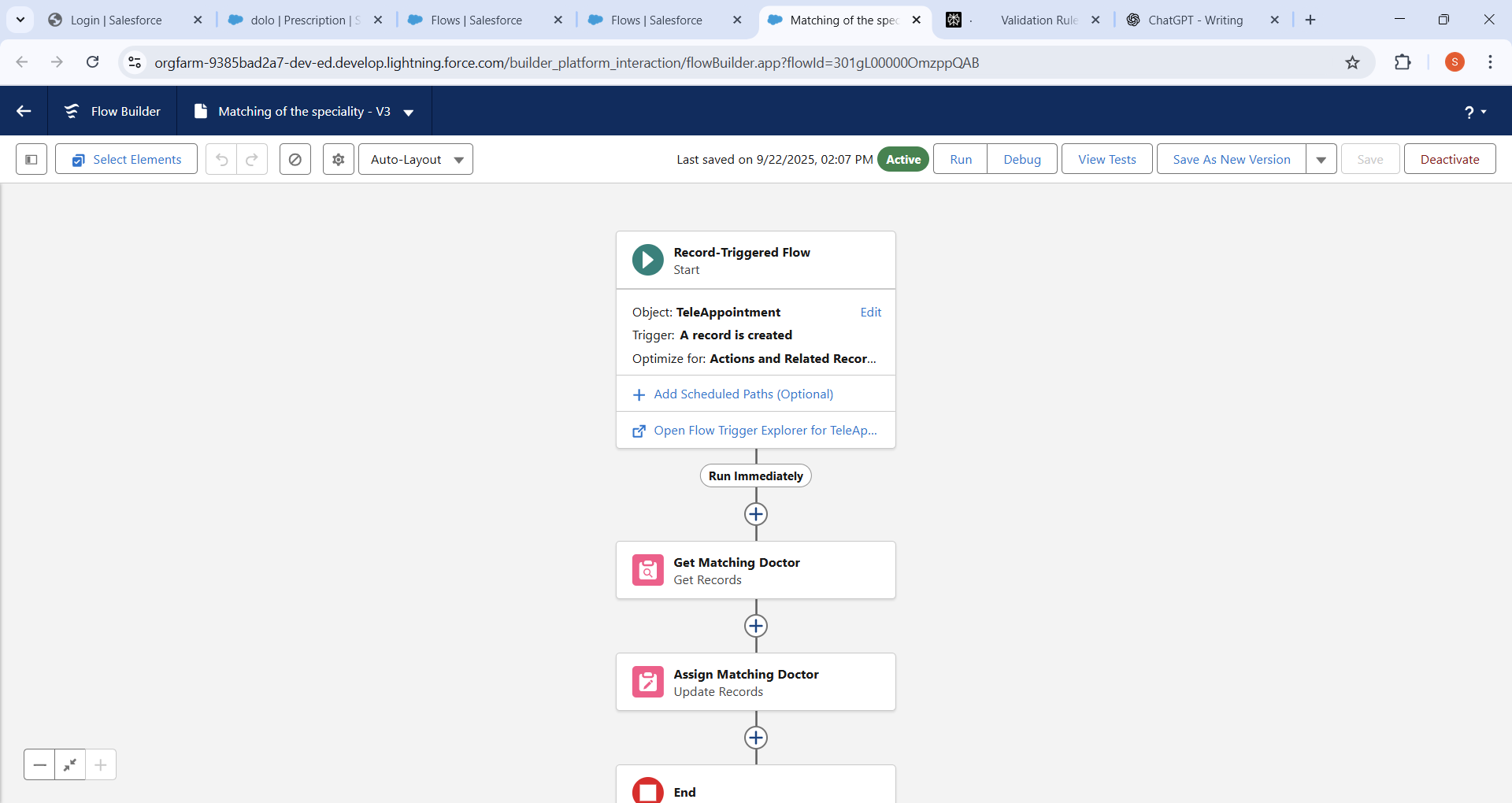
****

**Approval Process**

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

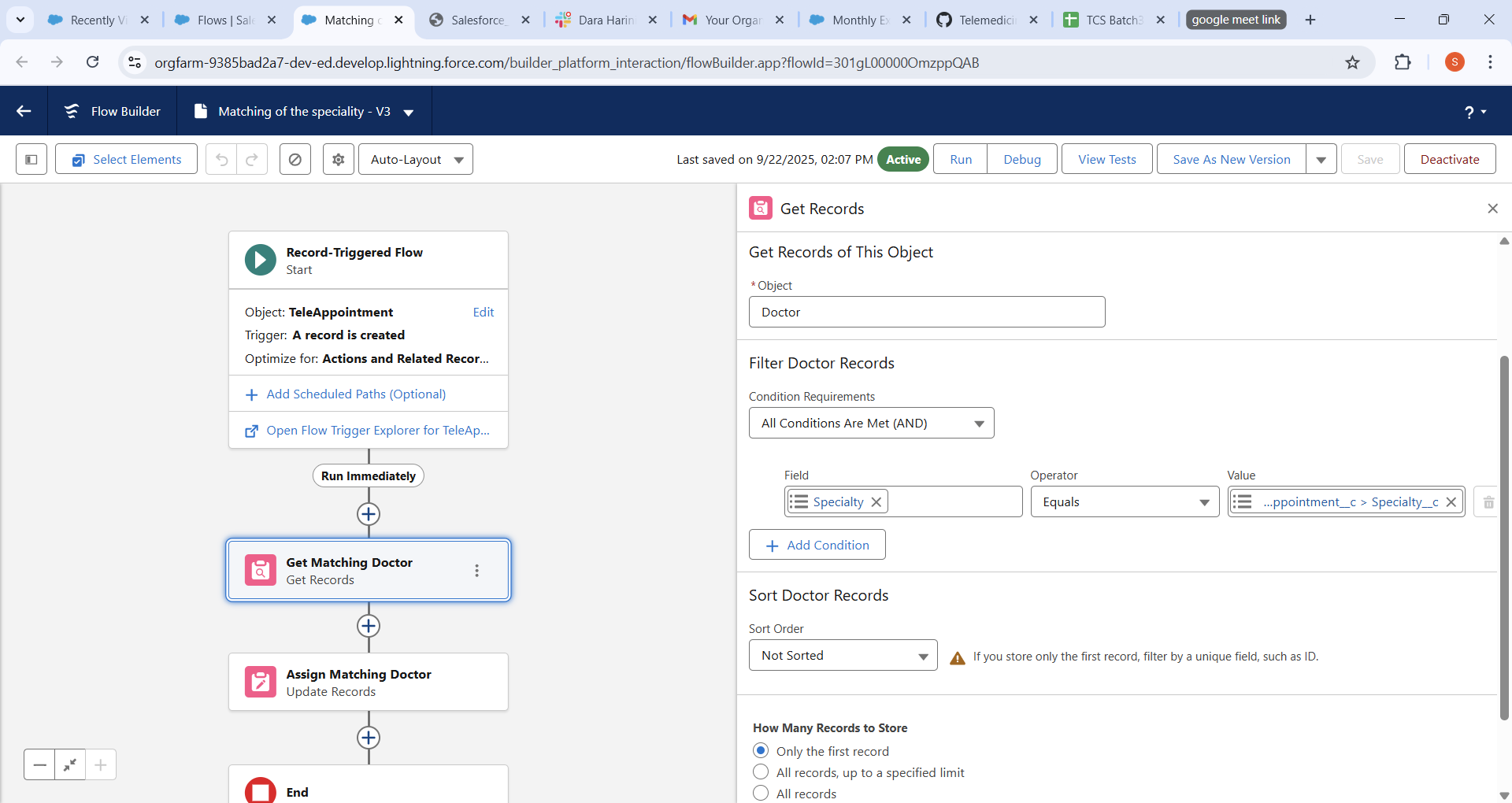
* **TM\_Prescription\_Approval**: This process is for approving prescriptions. It's triggered when a prescription is restricted or the total cost is over $5,000.
* The approval process has two steps: a "Doctor Review" and a "Department Head Approval."
* When a record is submitted for approval, an email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

**8.Flows:**

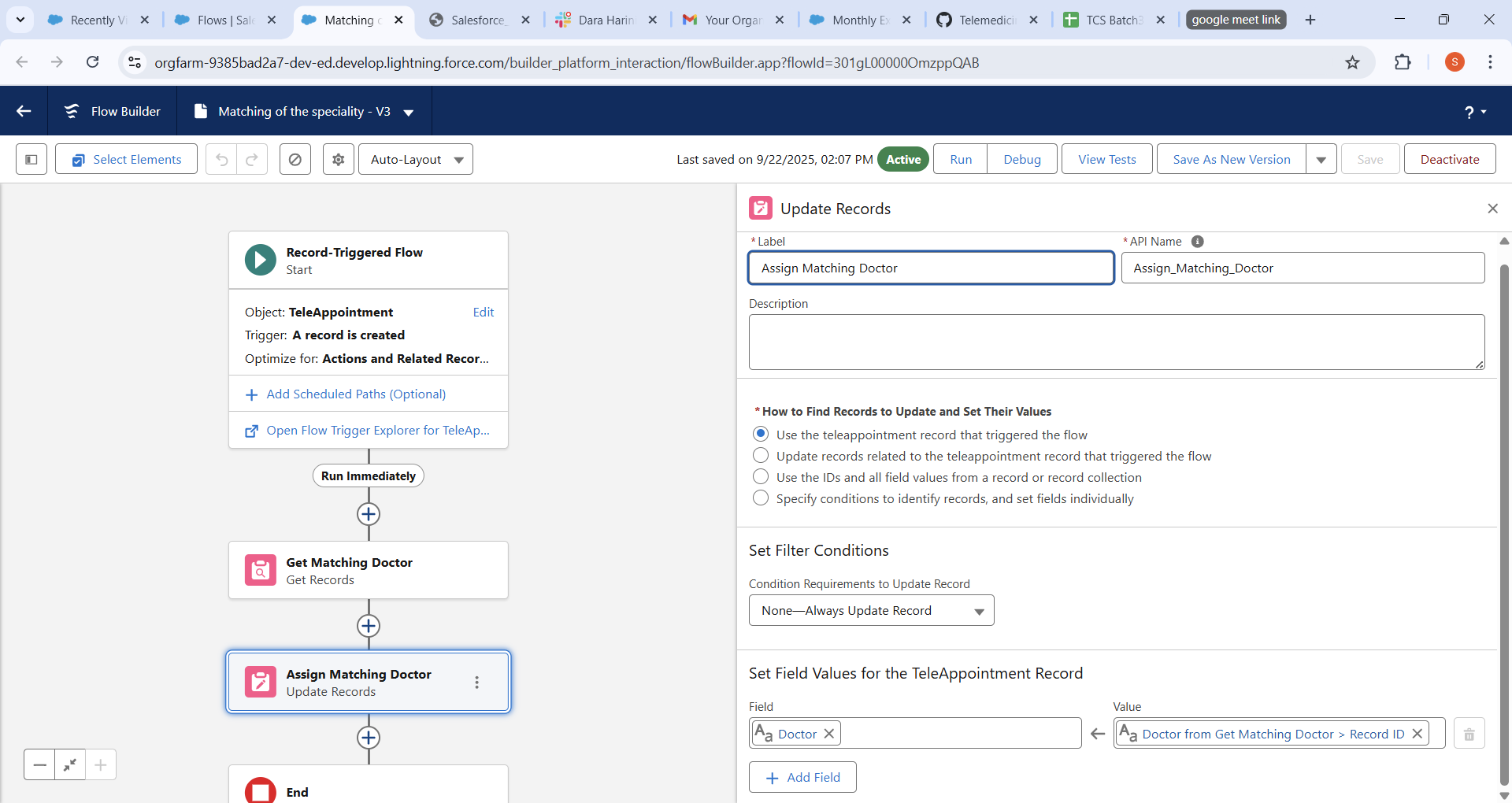
****

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

1. Selected the Get Record and used the given filter

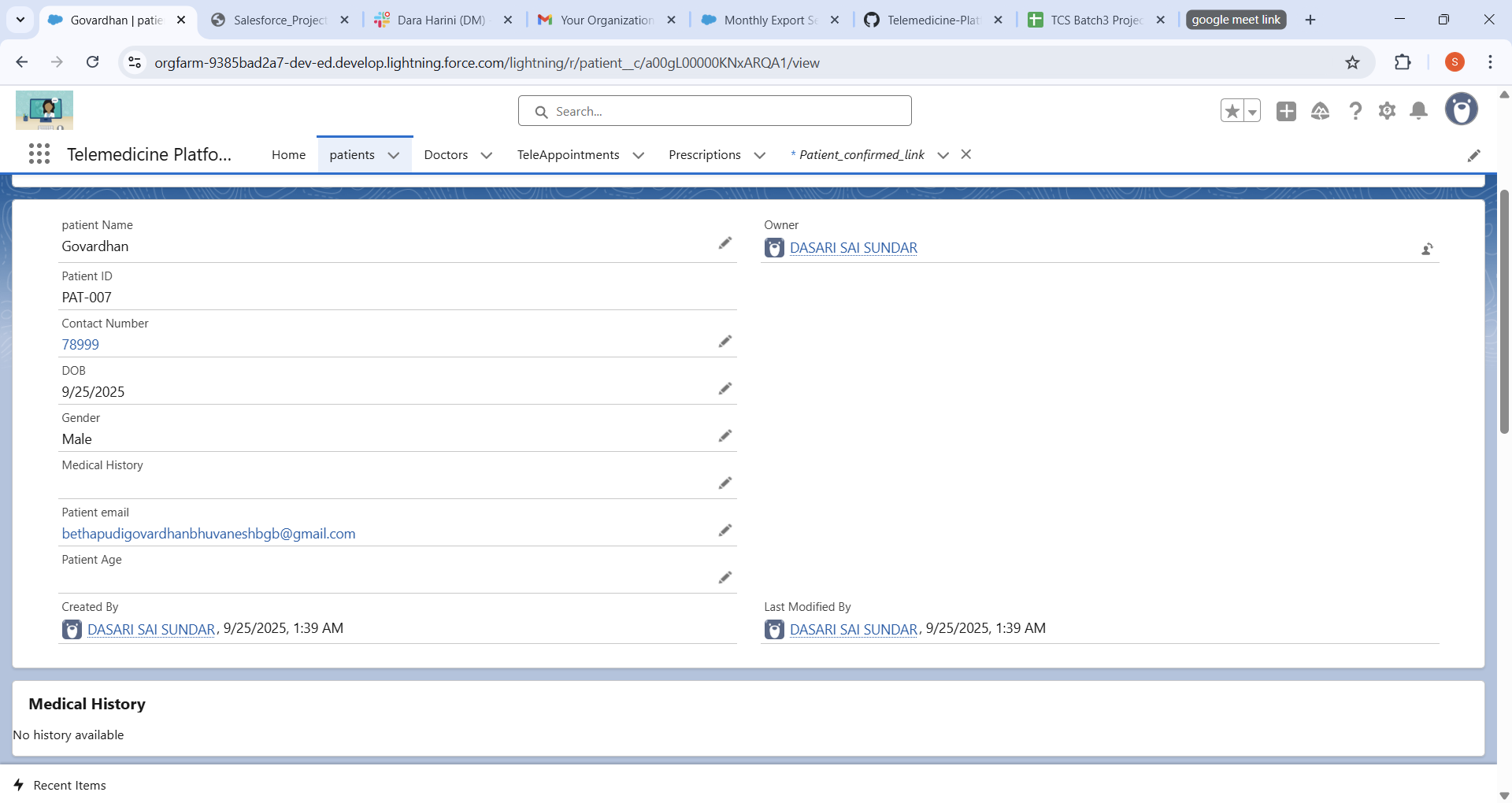
****

1. Update the record with the name Assigning Matching Doctor:

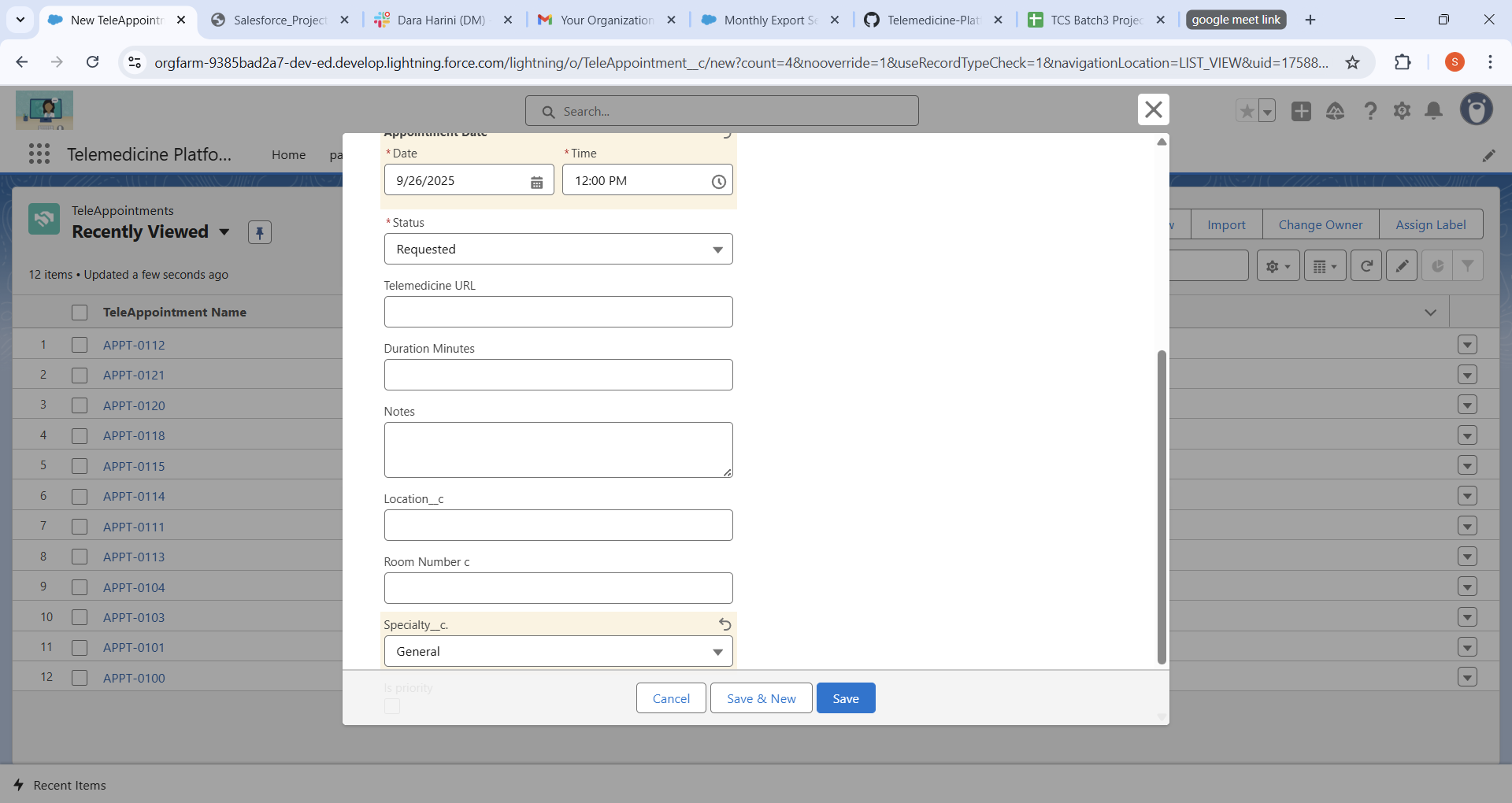


1. Test in the Platform:

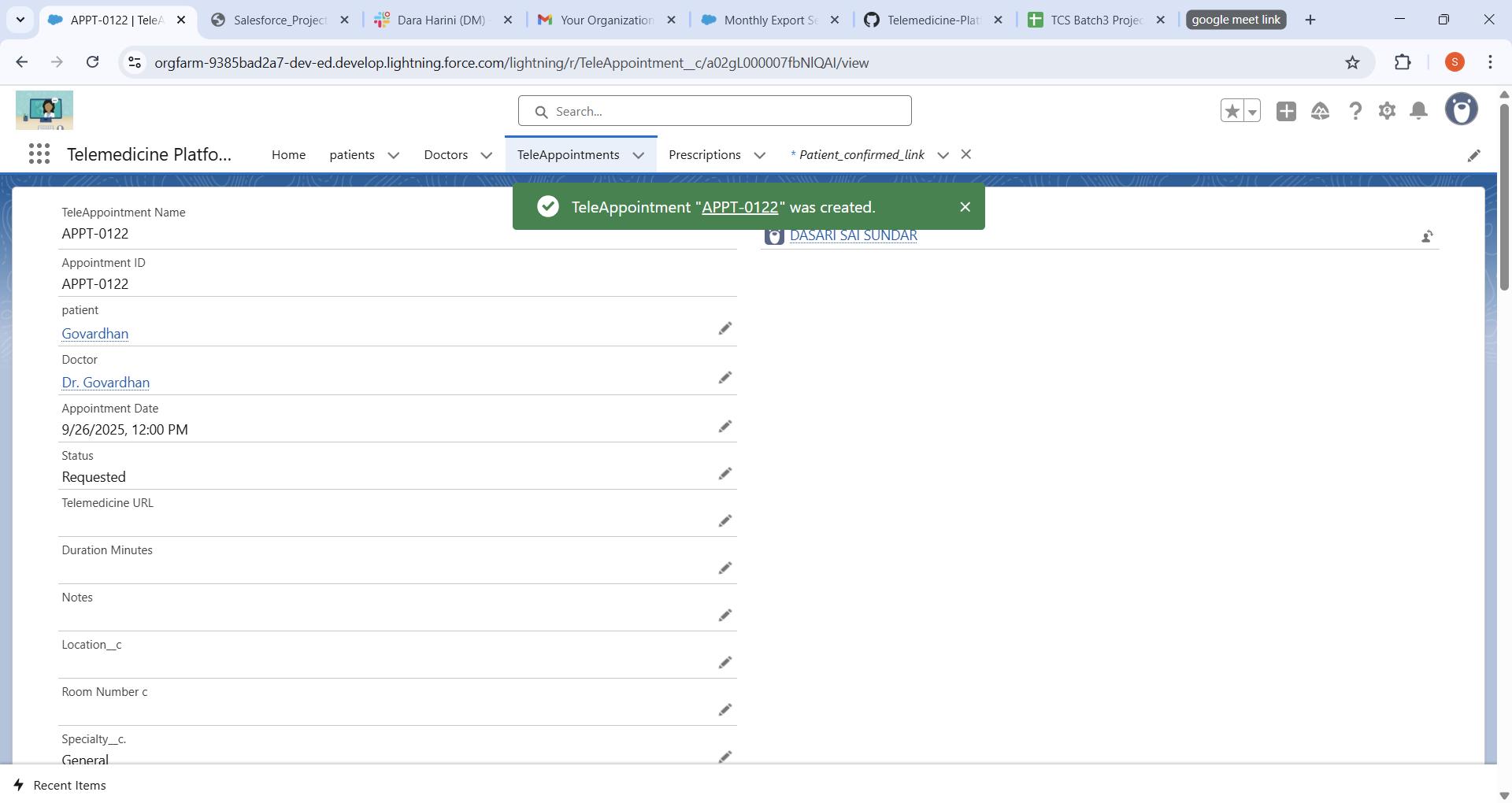
* Let us consider Govardhan



* Just selected the Specialization not doctor

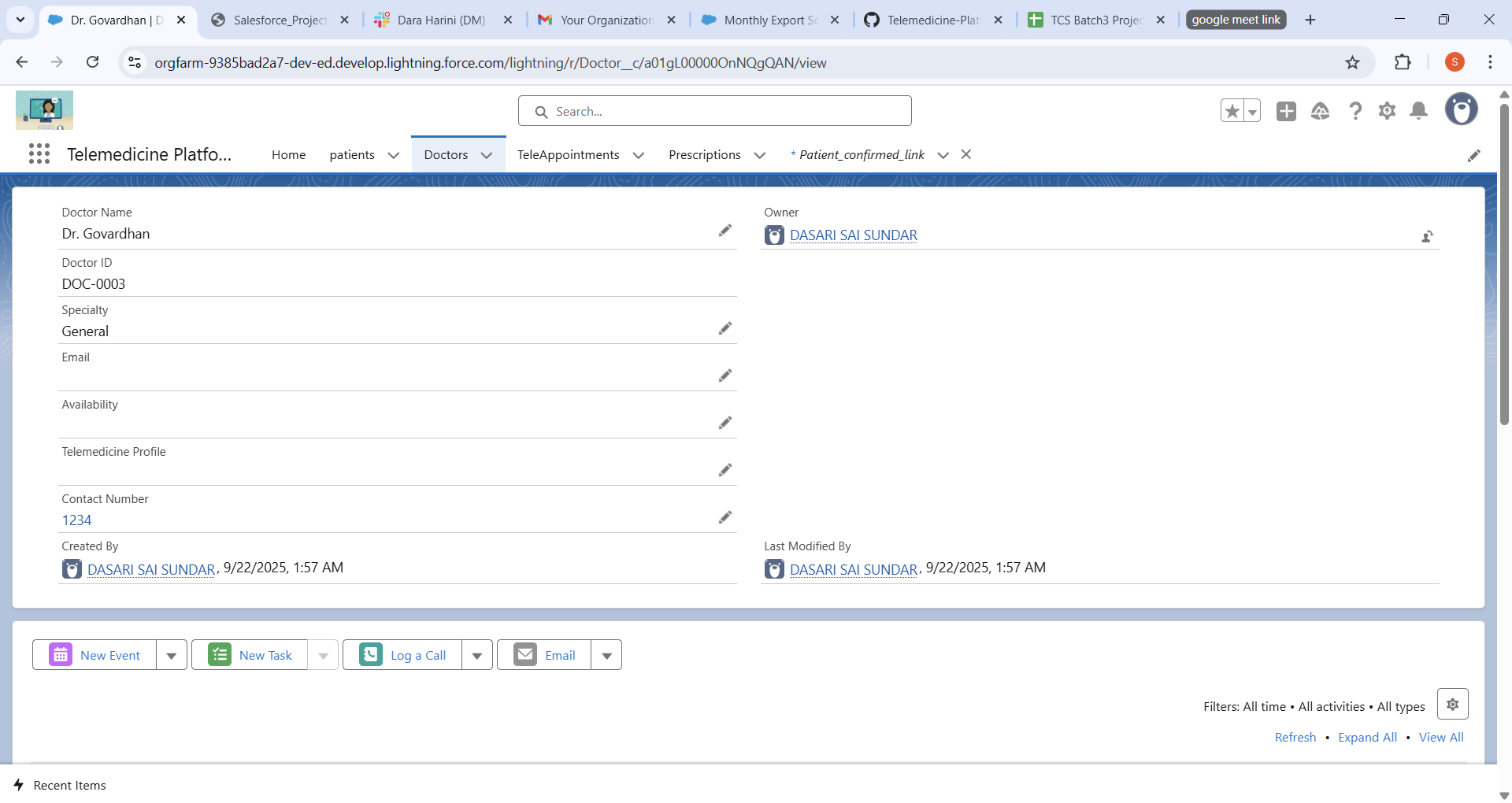


* After saving Directly Assigned



As we see there a general doctor Govardhan is assigned to him

Page of Dr. Govardhan



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.