**Salesforce Project Implementation Phases**

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

In this phase, I automate business processes in Salesforce to reduce manual work, ensure data quality, and improve patient care efficiency. We use \*\*Validation Rules, Workflow Rules, Process Builder, Approval Processes, Flow Builder, and Notifications\*\* tailored for Telemedicine CRM.

* **Validation Rules**

Validation Rules ensure data accuracy before records are saved.

* **Patient Aadhaar Validation**

- Object: Patient\_\_c

- Rule: Aadhaar\_Number\_\_c must be 12 digits.

- Formula: NOT(REGEX(Aadhaar\_Number\_\_c, "[0-9]{12}"))

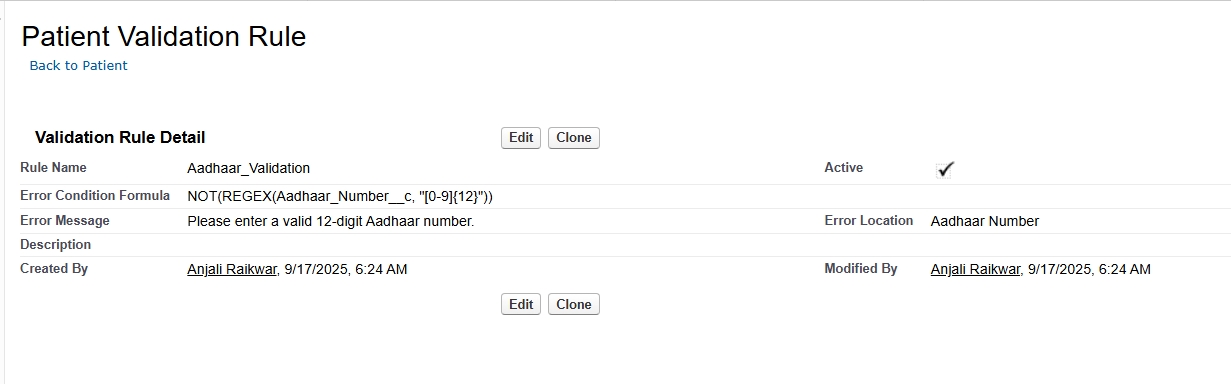
- Error: " Please enter a valid 12-digit Aadhaar number."

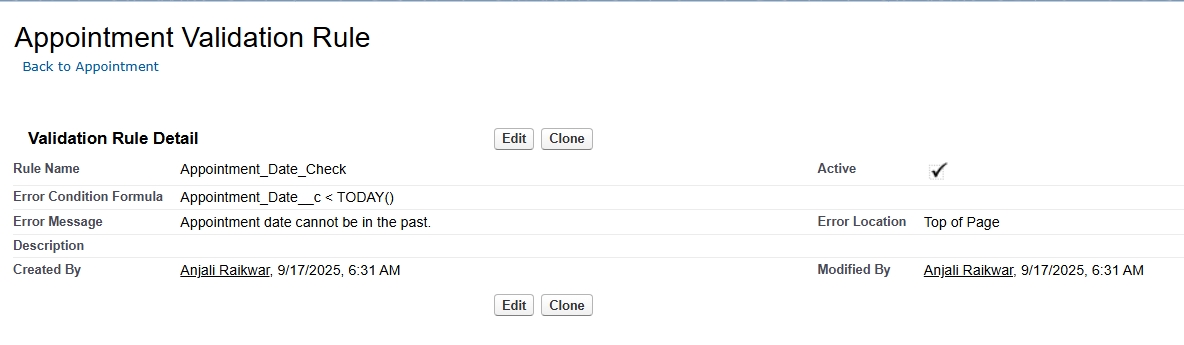
* **Appointment Date Check**

- Object: Appointment\_\_c

- Rule: Appointment\_Date\_\_c must be greater than TODAY().

- Error: "Appointment date cannot be in the past."





* **Workflow Rules**

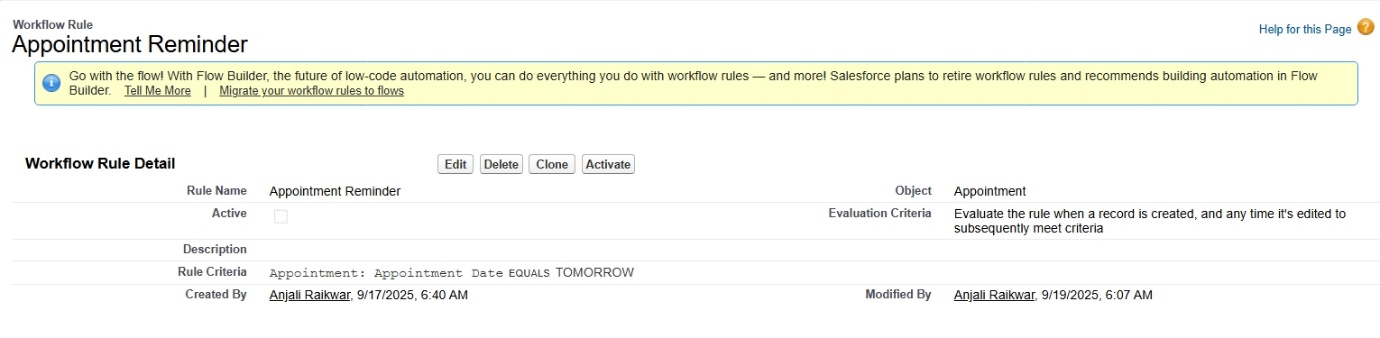
Workflow Rules help automate simple actions.

**Send Email Reminder**

- Object: Appointment\_\_c

- Condition: Appointment\_Date\_\_c = Tomorrow.

- Action: Send email alert to Patient\_\_c.Email and Doctor\_\_c.Email.

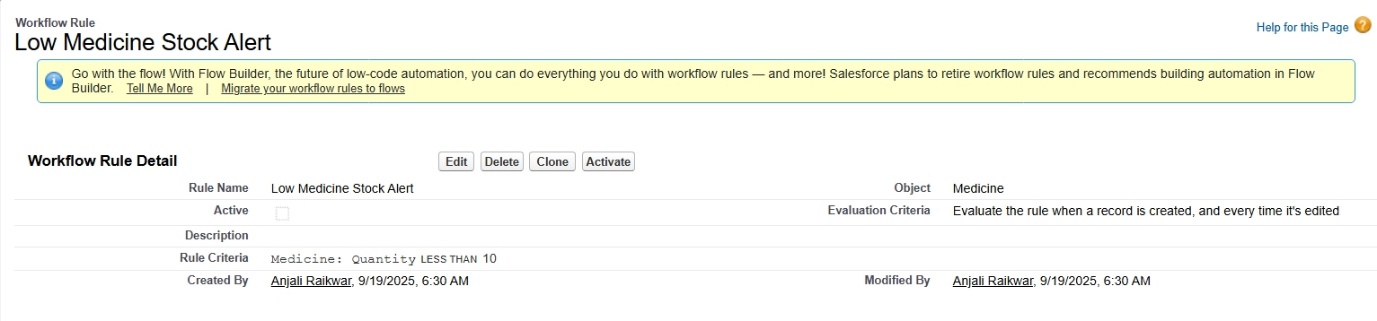


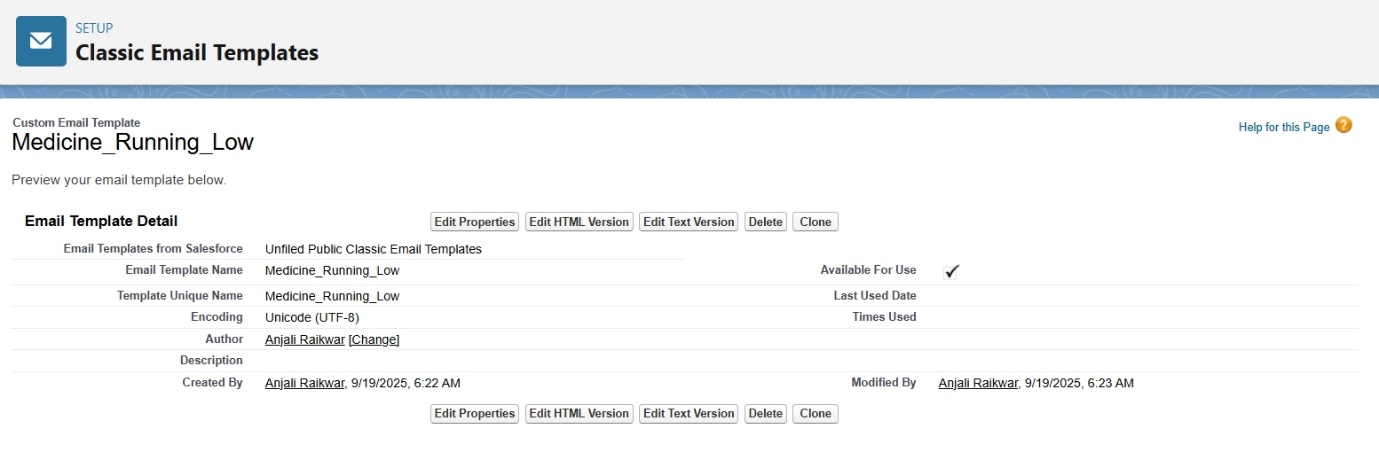
**Medicine Stock Low**

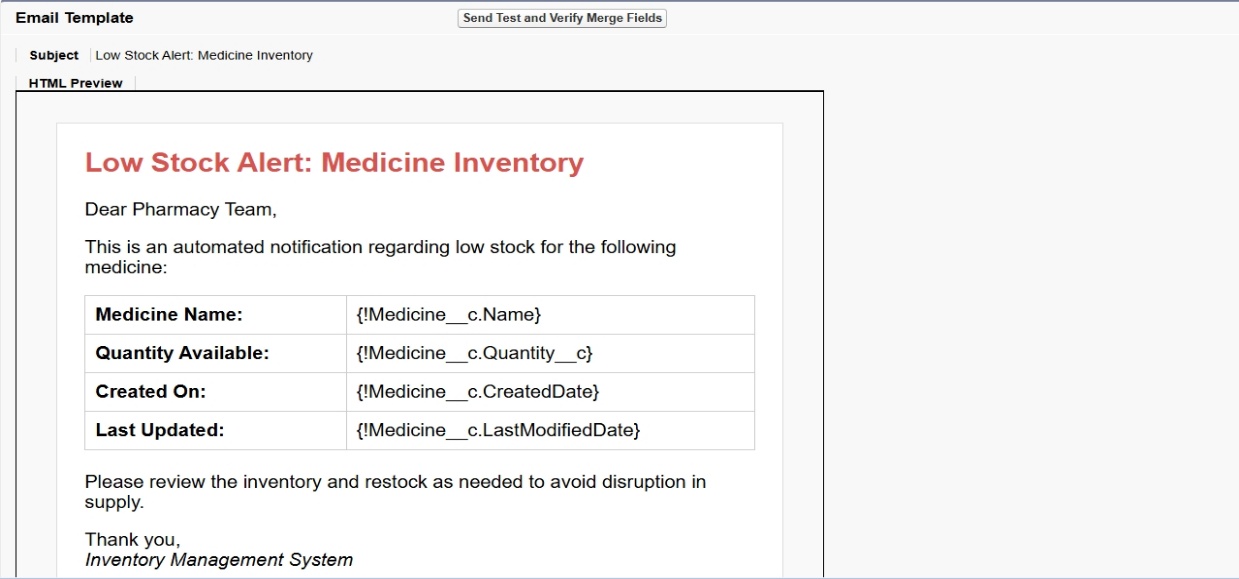
- Object: Medicine\_\_c

- Condition: Quantity\_\_c < 10.

- Action: Send notification to Pharmacy Staff.







* **Process Builder**

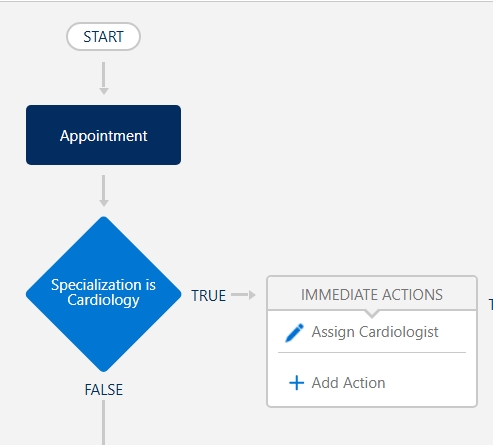
Process Builder is used for slightly complex automation with if/else logic.

**Auto-Assign Doctor**

- Object: Appointment\_\_c

- Criteria: Specialization\_\_c = "Cardiology"

- Action: Assign to Doctor\_\_c where Doctor.Specialization\_\_c = "Cardiology".

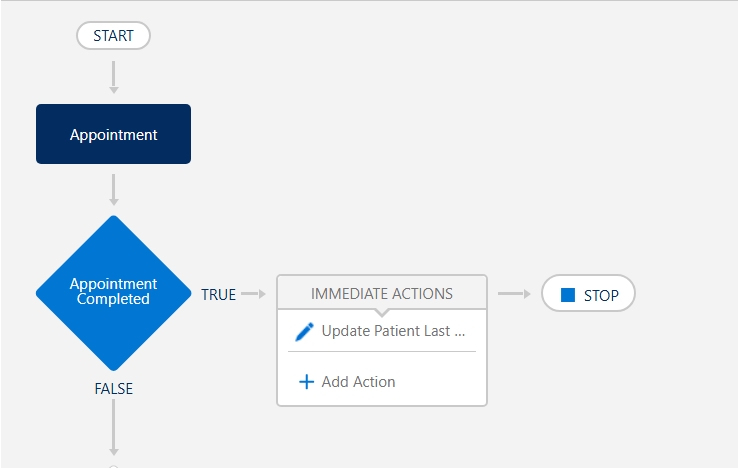


**Update Patient Last Visit**

- Object: Appointment\_\_c

- Action: Update Patient\_\_c.Last\_Visit\_Date\_\_c with Appointment\_Date\_\_c when

appointment is completed.

****

* **Approval Process**

Approval processes help manage requests that need authorization.

**Medicine Restock Request**

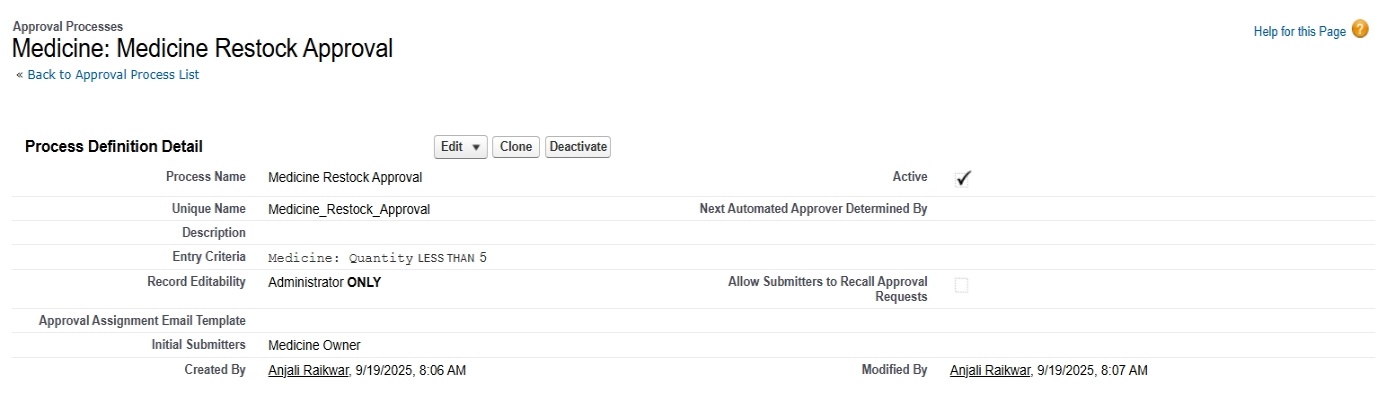
- Object: Medicine\_\_c

- Criteria: Quantity\_\_c < 5

- Step 1: Pharmacy Staff submits a restock request.

- Step 2: Approved by Hospital Admin.

- Step 3: Once approved → Purchase order is created (custom object: Purchase\_Order\_\_c).



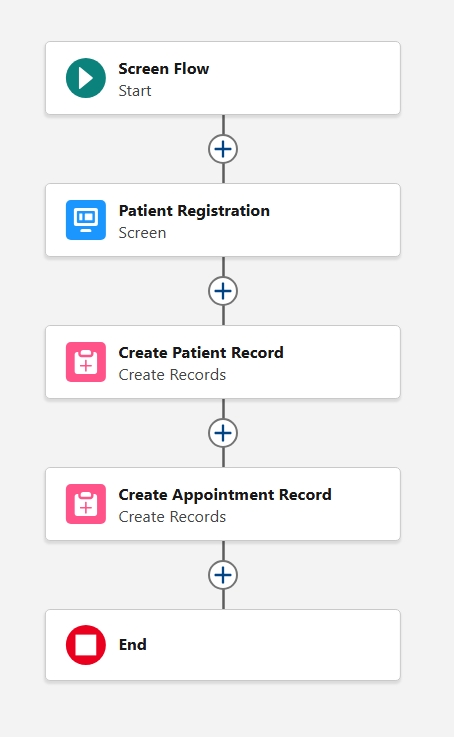
* **Flow Builder**

Flows provide advanced automation (Screen Flows, Record-Triggered, Auto-launched).

**Screen Flow: New Patient Registration**

- Collect Aadhaar, Name, Age, Symptoms.

- Auto-create Patient\_\_c record + Initial Appointment\_\_c.



**Record-Triggered Flow: Appointment Reminder**

- Trigger: 1 day before Appointment\_\_c.Appointment\_Date\_\_c

- Action: Send WhatsApp/SMS/Email to patient.

**Scheduled Flow: Expiring Medicine Notification**

- Run daily at 10 AM.

- Check Medicine\_\_c.Expiry\_Date\_\_c = TODAY() + 2.

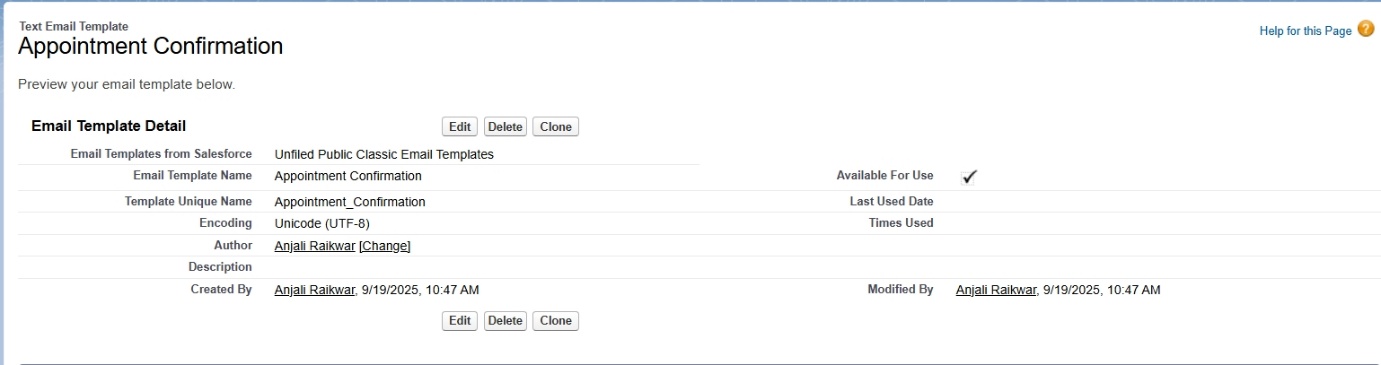
- Send alert to Pharmacy Staff.

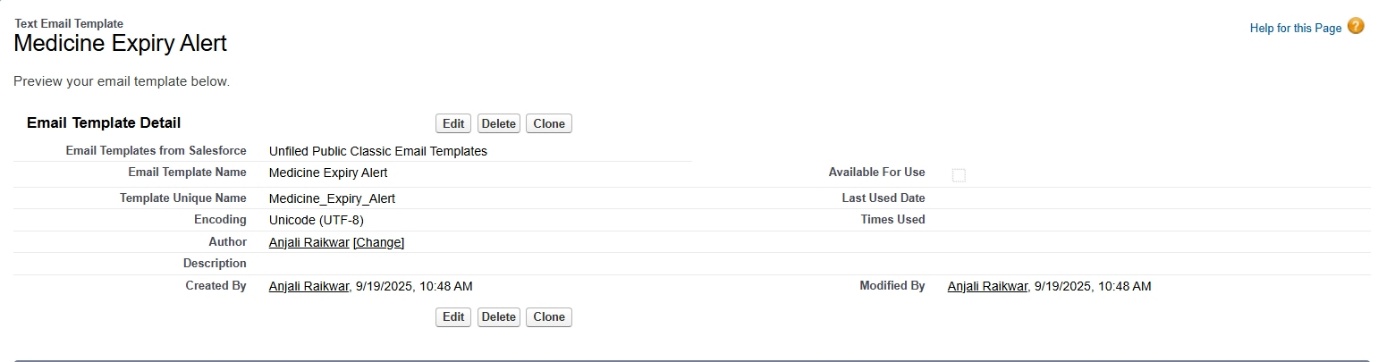
* **Email Alerts**

Email templates + alerts linked with rules and flows.

- Appointment Confirmation Email → Patient & Doctor.

- Low Inventory Email → Hospital Admin.



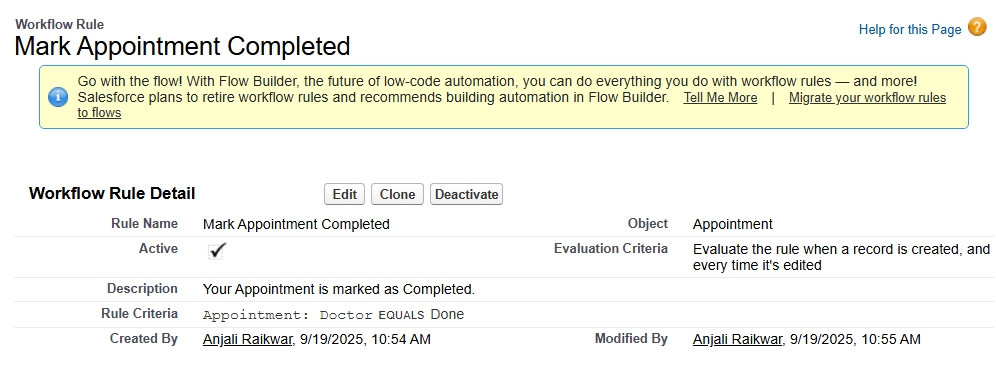


* **Field Updates**

Automatically update fields.

- Appointment\_\_c.Status\_\_c → "Completed" when Doctor marks Consultation Complete.

- Patient\_\_c.Last\_Consulted\_Doctor\_\_c → Auto-updated on new appointment.



* **Tasks**

Assign tasks automatically.

- If Appointment is missed → Auto-create Task for Doctor to follow up with patient.

* **Custom Notifications**

Use in-app and mobile notifications.

- Notify Doctor: "New appointment assigned."

- Notify Pharmacy: "Paracetamol stock below 10 units."

- Notify Patient: "Your appointment with Dr. Sharma is tomorrow at 10:30 AM."

