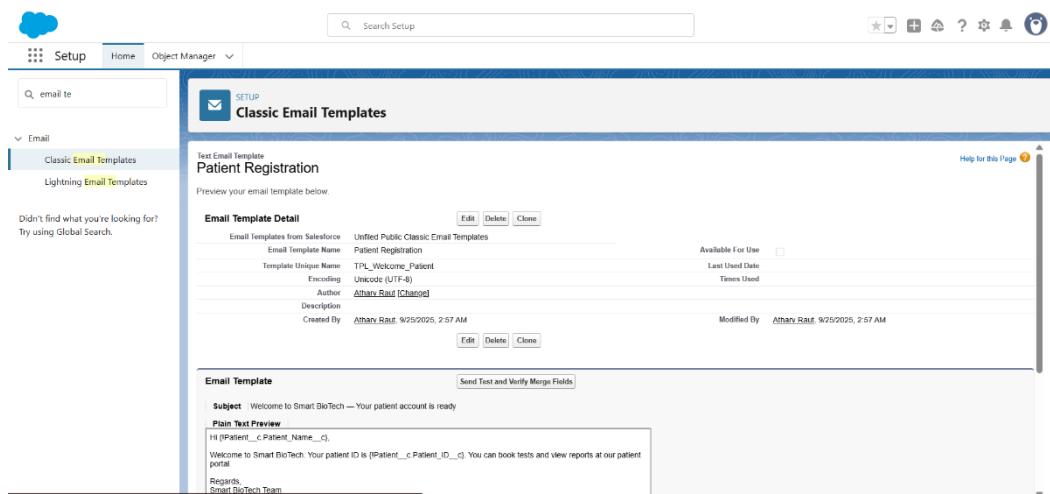


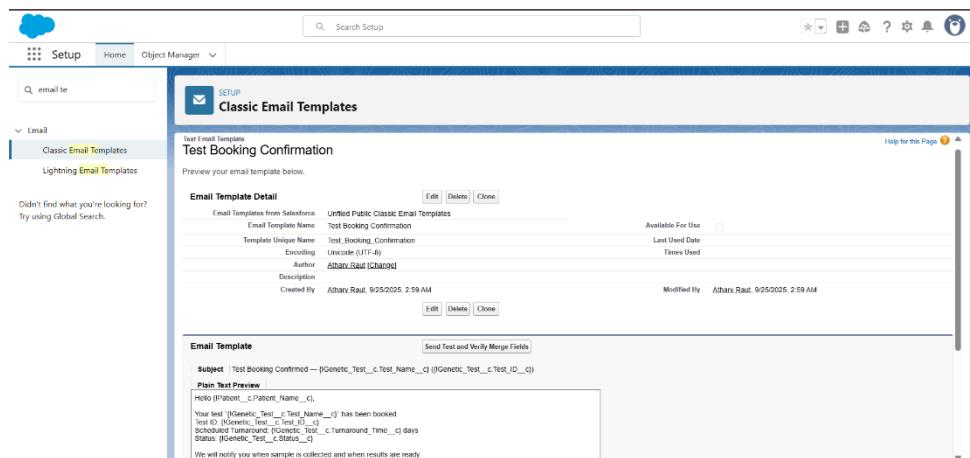
Phase 4: Process Automation (Admin)

Step 1: Create Email Templates

1. Click **Setup ()** → In Quick Find, type **Email Templates** → Select **Email Templates**.
 2. Click **New Email Template** → Select **Lightning Email Template**.
 3. Fill details like **Name** and **Subject**, then design the email body.
 4. Save the template.
- **Welcome Email** → Sent after Patient registration.



- **Test Booking Confirmation Email** → Sent after test booking confirmation is done



- **Sample Collected Notification Email** → Sent after sample collection is done.

Email Template Detail

Email Template Name	Sample_Collected_Notification	Available For Use
Template Unique Name	Sample_Collected_Notification	Last Used Date
Encoding	Unicode (UTF-8)	Times Used
Author	Athany Raut [Change]	
Description		
Created By	Athany Raut	Modified By
	9/25/2025, 3:01 AM	Athany Raut, 9/25/2025, 3:01 AM

Email Template

Subject: Sample Collected — [{Genetic_Test__c.Test_ID__c}]

Plain Text Preview:

Hi {Patient__c.Patient_Name__c},
We have collected your sample for Test ID [{Genetic_Test__c.Test_ID__c}] on [{Sample__c.Collection_Date__c}].
Collected by: [{Sample__c.Collected_By__c}]

Regards,
Smart BioTech Lab

- **Report Ready Notification Email** → Sent report of patient genetic testing is ready.

Email Template Detail

Email Template Name	Report Ready Notification	Available For Use
Template Unique Name	Report_Ready	Last Used Date
Encoding	Unicode (UTF-8)	Times Used
Author	Athany Raut [Change]	
Description		
Created By	Athany Raut	Modified By
	9/25/2025, 3:02 AM	Athany Raut, 9/25/2025, 3:02 AM

Email Template

Subject: Your Report is Ready — [{Genetic_Test__c.Test_ID__c}]

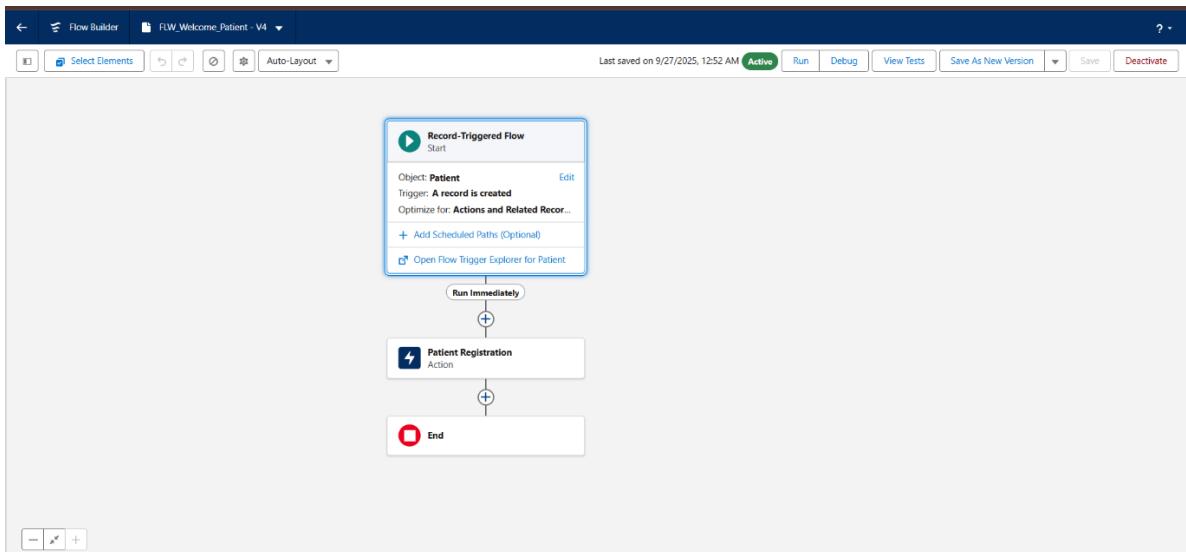
Plain Text Preview:

Hello {Patient__c.Patient_Name__c},
Your report for Test ID [{Genetic_Test__c.Test_ID__c}] is ready. Please log in to the patient portal to view/download the report.

Regards,
Smart BioTech

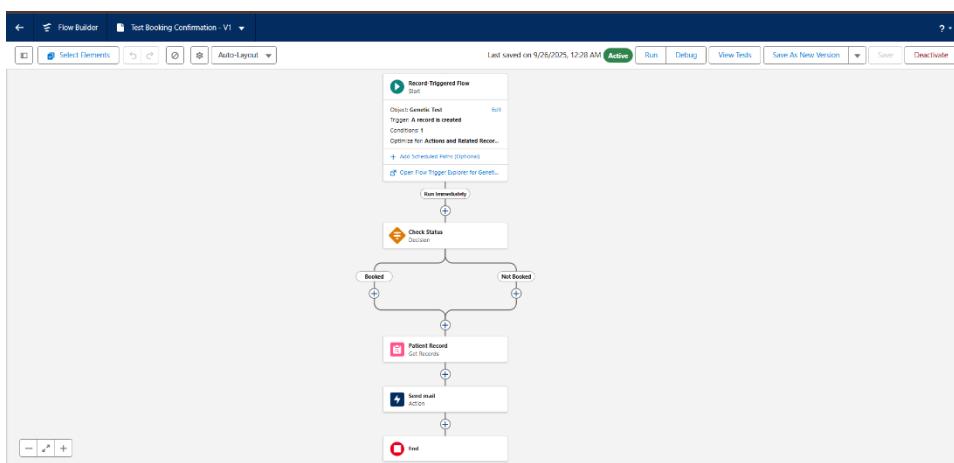
1. FLW_Welcome_Patient Flow

1. Click **Setup ()** → Quick Find → **Flows** → **New Flow**.
2. Select **Record-Triggered Flow**.
3. Choose **Object: Patient__c** → Trigger: **When record is created** → **After Save**.
4. Add Action → **Send Email** → Select **Patient Registration Template**.
5. Save and activate.



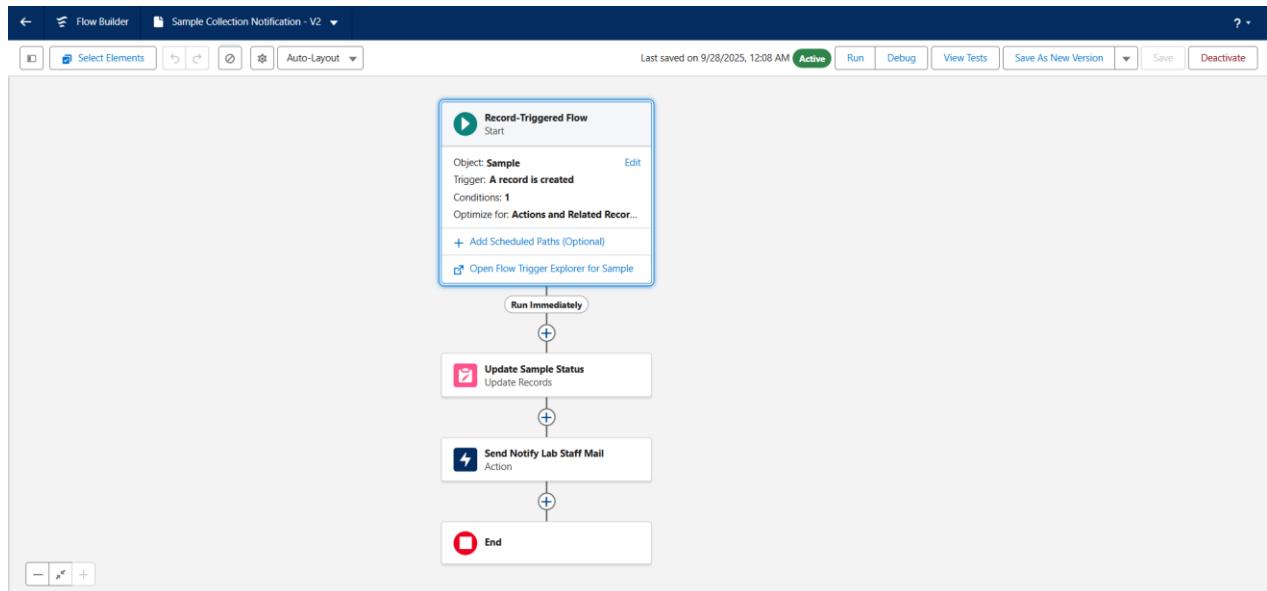
2. Test Booking Confirmation Flow (After Match & Scheduling)

1. Click **Setup** → **Flows** → **New Flow**.
2. Select **Record-Triggered Flow** → **Object: Genetic_Test__c** → **Trigger: A Record is Created** → **After Save**.
3. Add **Decision element** → **Check Status**
4. Add **Get Records** → **Patient__c** (find patient with genetic test) → **Patient_ID** → **Equals** → **Patient**.
5. Add **Action** → **Send Email** → Select **Patient Registration Template**.
6. Save and activate.



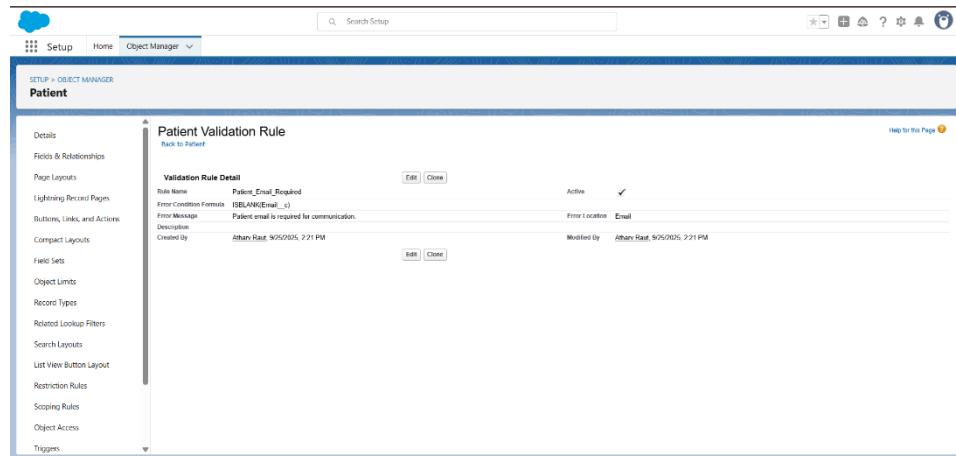
3. Sample Collection Notification Flow

1. Click **Setup** → **Flows** → **New Flow**.
2. Select **Record-Triggered Flow** → **Object: Sample__c**
3. Trigger: **When record is created** → **After Save**.
4. Add **Update Records** → Update Sample Status
5. Add **Action** → **Send Notify Staff Mail Email** → Select **Sample Collected Notification**.
6. Save and activate.



Step 3: Add Validation Rules

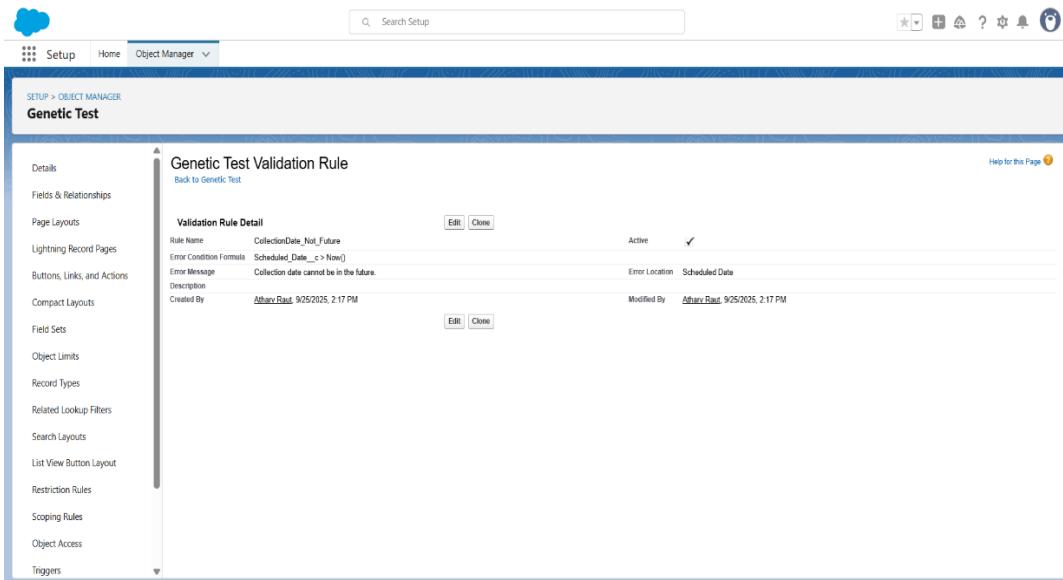
1. Click **Setup** → **Object Manager** → **Patient__c** → **Validation Rules** → **New**.
2. Create Rule: **Patient Email Required**
 - o Formula: ISBLANK>Email__c
 - o Error: "Patient Email is required for communication."



3. Click **Setup** → **Object Manager** → **Genetic_Test__c** → **Validation Rules** → **New**.

4. Create Rule: **Collection Date Not Future**

- o Formula: **Scheduled_Date_c > Now()**
- o Error: "Collection Date cannot be in the future."



5. Click **Setup** → **Object Manager** → **Genetic_Test__c** → **Validation Rules** → **New**.

6. Create Rule: **Cost Positive**

- o Formula: **Cost_c >= 0**
- o Error: "Test Cost must be greater than zero."

The screenshot shows the Salesforce Object Manager interface for the 'Genetic Test' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Validation Rules. The main content area displays the 'Genetic Test Validation Rule' detail page. The rule is named 'Cost_Positive' and has the formula 'Cost__c >= 0'. It specifies an error message: 'Test cost must be greater than zero'. The rule is active and was created by Athany Raut on 9/25/2025 at 2:12 PM.

7. Click **Setup** → **Object Manager** → **Sample__c** → **Validation Rules** → **New**.

8. Create Rule: **Collection Date**

- o Formula: **Collection_Date__c > Now()**
- o Error: "Collection Date cannot be in the future."

The screenshot shows the Salesforce Object Manager interface for the 'Sample' object. The sidebar includes options like Details, Fields & Relationships, Page Layouts, and Validation Rules. The main content area shows the 'Sample Validation Rule' detail page. The rule is named 'Collection_Date' and has the formula 'Collection_Date__c > Now()'. It specifies an error message: 'Collection date cannot be in the future'. The rule is active and was created by Athany Raut on 9/25/2025 at 2:19 PM.

Step 4: Approval Process

Approval Process ensures authorization before records proceed.

- Genetic Test cost is above ₹10,000 requires Admin approval.
- Insurance Status requires admin approval for rejection or acceptance.

Setup Home Object Manager

Analytics Apps App Install History Auto-Installed Apps

Approval Settings Service

Embedded Service Messaging for In-App and Web User Verification

Field Service Field Service Mobile App Builder

Slack Slack Apps Setup

Heroku Apps

Process Automation Approval Processes

User Interface App Menu Lightning App Builder

Custom Code Canvas App Previewer

User Engagement In-App Guidance

Didn't find what you're looking for? Try using Global Search.

Approval Processes Genetic Test: HighValue Test Approval < Back to Approval Process List

Help for this Page

Process Definition Detail

Process Name	HighValue Test Approval	Active	✓
Unique Name	HighValue_Test_Approval	Next Automated Approver Determined By	Manager of Record Submitter
Description	Approves Genetic Tests with Cost > 10,000 before execution.		
Entry Criteria	Genetic Test: Cost GREATER THAN 10000		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	Sample Collected Notification		
Initial Submitters	Genetic Test Owner		
Created By	Afshar Rad	Created On	9/25/2025, 2:45 PM
Modified By	Afshar Rad	Modified On	9/25/2025, 3:16 PM

Initial Submission Actions

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions	Edit	1	Test Approval	Cost_c >= 50000, else Approve	Manager	Final Rejection

Final Approval Actions

Action	Type	Description
Edit	Record Lock	Lock the record from being edited
Edit Remove	Field Update	Set Insurance_Status Verified

Final Rejection Actions

Action	Type	Description
Edit	Record Lock	Unlock the record for editing
Edit Remove	Field Update	Set Insurance_Status Rejected