

MediCare Connect — Phase 4: Process Automation (Admin)

Goal: Automate manual steps such as validation, reminders, approvals and notifications so appointments and cases move automatically without human follow-ups.

1. Validation Rules

- A validation rule created on **Appointment** object to ensure **Appointment Date/Time is always in the future** and to **Prevent invalid data (zero or negative duration)**.
- This prevents Receptionists from scheduling appointments in the past and improves data accuracy.

The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main area is titled 'Validation Rules' and displays two rules:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
VR_AppointmentDate_InFuture	Appointment Date/Time	Appointment Date/Time must be in the future.	✓	Swaroop Admin, 18/09/2025, 9:33 pm
VR_Duration_Positive	Duration (Minutes)	Duration must be greater than zero.	✓	Swaroop Admin, 18/09/2025, 9:34 pm

Fig.1 ValidationRules

The screenshot shows the MediCare Appointments page. In the 'Information' section, there is an error message: 'Appointment Date/Time must be in the future.' Below it, another error message for the 'Duration (Minutes)' field states: 'Duration must be greater than zero.' The 'Duration (Minutes)' input field contains '-10'. A modal window titled 'We hit a snag.' provides instructions to review the 'Duration (Minutes)' and 'Appointment Date/Time' fields.

Fig.2 ValidationRules Testing

2. Email Templates for Automation

Two classic email templates were created and stored under Private Email Templates:

- **ET_Appointment_Confirmation** – sends confirmation to the patient when an appointment is created or confirmed.

The screenshot shows the MediCare software interface with the title bar "MediCare". The main menu includes "Appointments", "Medical Cases", "Patients", "Reports", and "Dashboards". A search bar at the top right contains the placeholder "Search...". Below the menu, a breadcrumb navigation shows the path: "Email Template > ET_Appointment_Confirmation". On the right side of the header are icons for "Edit", "Clone", and "Delete". The main content area is titled "Email Template ET_Appointment_Confirmation". It has tabs for "Details" and "Related". Under "Details", there are sections for "Information" and "Message Content". The "Information" section includes fields for "Email Template Name" (set to "ET_Appointment_Confirmation"), "Description", and "Related Entity Type" (set to "Appointment"). The "Message Content" section contains the subject "Appointment confirmation — [[{Recipient.Name}]]" and the HTML value: "Hello {{Recipient.FirstName}}...! Your appointment is conformed. Thank you, MediCare Connect Team". At the bottom, there is an "Additional Information" section with "Created By" (Swaroop Admin) and "Last Modified By" (Swaroop Admin).

Fig.3 Appointment Confirmation Template

- **ET_Appointment_Reminder** – sends a reminder email to the patient the day before appointment.

The screenshot shows the MediCare software interface with the title bar "MediCare". The main menu includes "Appointments", "Medical Cases", "Patients", "Reports", and "Dashboards". A search bar at the top right contains the placeholder "Search...". Below the menu, a breadcrumb navigation shows the path: "Email Template > ET_Appointment_Reminder". On the right side of the header are icons for "Edit", "Clone", and "Delete". The main content area is titled "Email Template ET_Appointment_Reminder". It has tabs for "Details" and "Related". Under "Details", there are sections for "Information" and "Message Content". The "Information" section includes fields for "Email Template Name" (set to "ET_Appointment_Reminder"), "Description", and "Related Entity Type" (set to "Appointment"). The "Message Content" section contains the subject "Appointment reminder — [[{Recipient.Name}]]" and the HTML value: "Hello {{Recipient.Name}}...! Reminder: Your Appointment is Tomorrow. Thank you, MediCare Connect Team". At the bottom, there is an "Additional Information" section with "Created By" (Swaroop Admin) and "Last Modified By" (Swaroop Admin).

Fig.4 Appointment Reminder Template

3. Flow for Appointment Confirmation

A record-triggered flow “**Appointment_Confirm_Flow**” built on **Appointment** object:

- **Trigger:** When record is created or when Status changes to “Confirmed.”
- **Action:**
 - Update “Confirmation Sent” checkbox on the Appointment.
 - Send the **ET_Appointment_Confirmation** email template to the Patient’s email.

This ensures every new or confirmed appointment automatically sends confirmation to the patient.

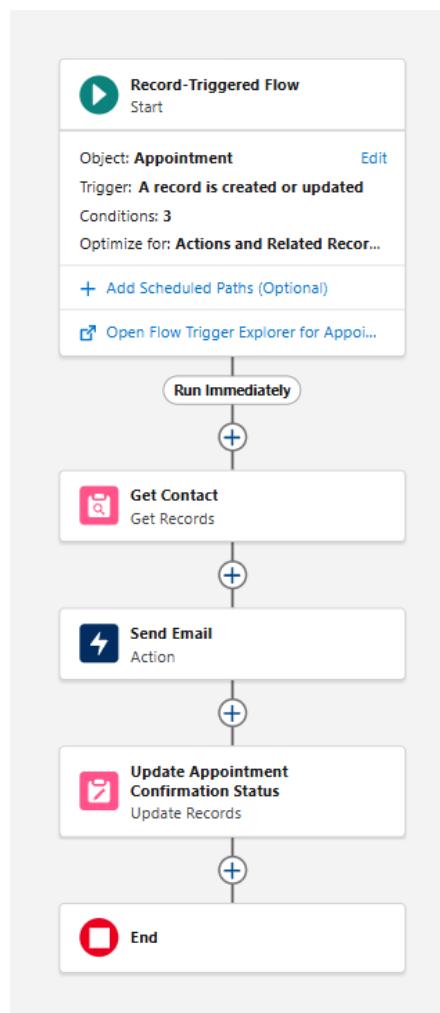


Fig.5 Appointment Confirm Flow

4. Reminder Notification & Email (Scheduled Path)

A separate **Appointment Remainder Flow** was created for sending reminder notifications:

- **Scheduled Path:** This path is triggered to run **1 day before Appointment Date/Time**.
- **Action:** Send the **ET_Appointment_Reminder** email to the Patient.

This ensures that the patient is reminded 24 hours before the appointment, ensuring they are well-informed and prepared.

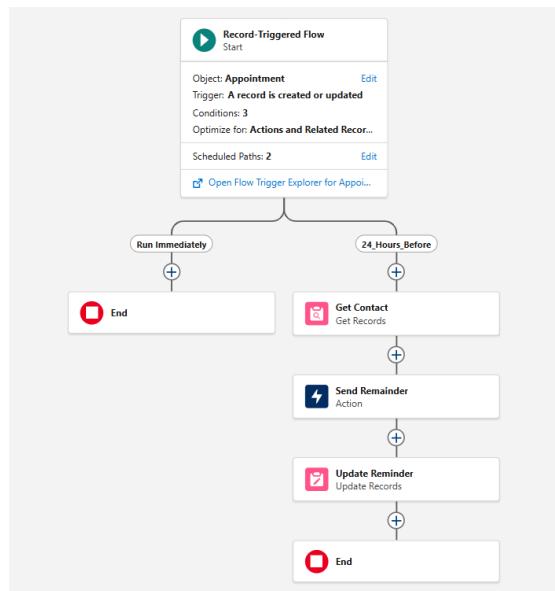


Fig.6 Appointment Remainder Flow

6. Quick Action – “Mark as Completed”

A Quick Action added on Appointment object:

- **Action Type:** Update a Record.
- **Predefined Field Values:** Status__c = “Completed.”
- Placed on Appointment page layout to allow one-click completion of appointments.

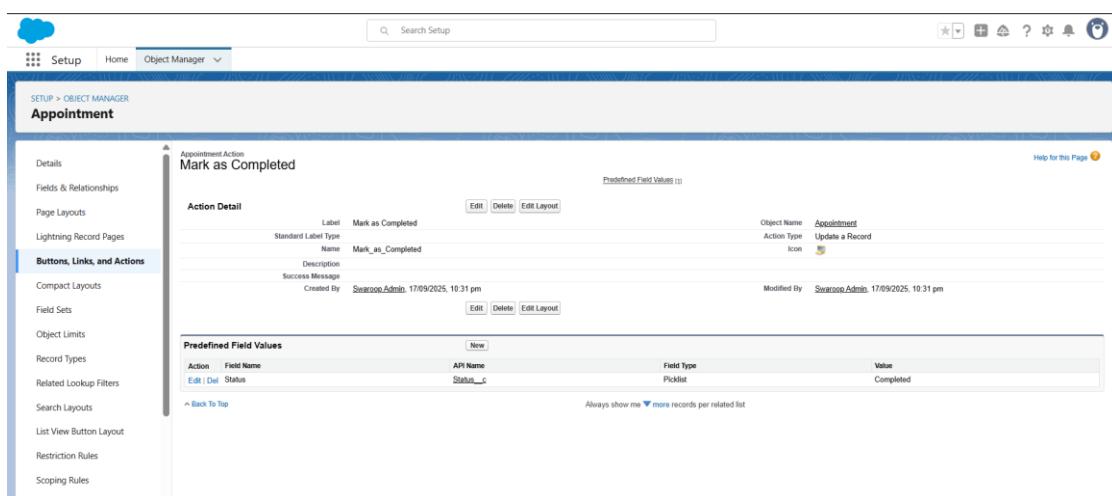


Fig.7 Mark As Completed Quick Action detail

8. Testing & Results

Sample Appointments were created to test the automation:

- Receptionist creates Appointment → Patient immediately receives confirmation email.
- Day before Appointment → Patient receives reminder email.
- Quick Action “Mark as Completed” updates Status with one click.



Fig.8 Appointment Confirmation Email



Fig.9 Appointment Reminder Email

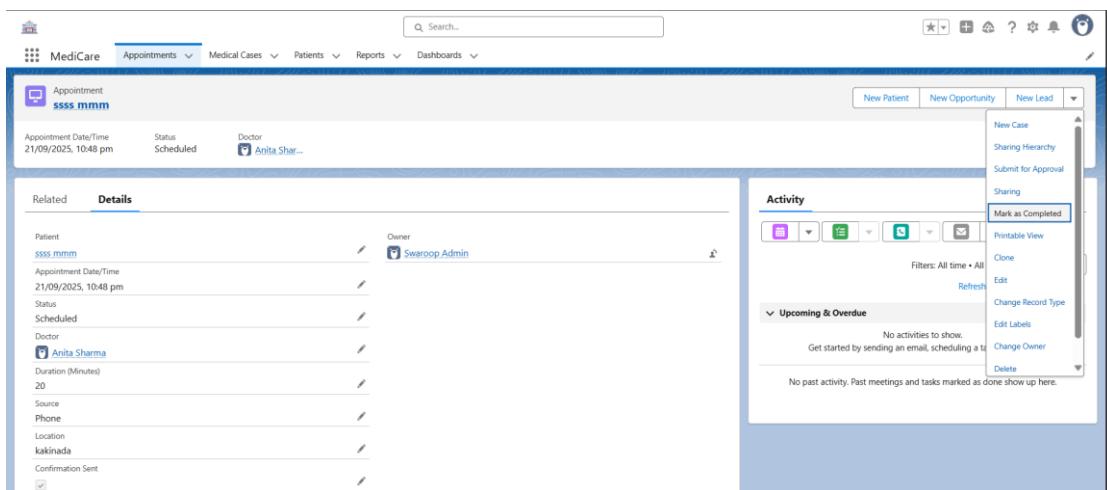


Fig.10 Mark As Completed Quick Action Button