# ­­my clinic

# Smart Appointment Booking – CRM Project

## Phase 4: Process Automation (Admin)

* Goal: Automate tasks using various concepts.

### 1. Validation Rules

* [Appointment Time Required](https://myclinic-durga-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IgL0000029s85/ValidationRules/03dgL000000UD6HQAW/view) :We must enter the Appointment Time while booking the Appointment
* Check Appointment Date : Appointment date cannot be earlier today
* Check Completed Status : Cannot mark appointment as Completed without assigning a Doctor.
* Require Doctor : Please select a doctor before saving the appointment

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* Valid Daily Limit : Max Daily Appointments to doctors cannot be Greater than 24

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### 2. Workflow Rules (legacy)

• Auto-send emails when booking is confirmed, rejected. (But we’ll use flow instead)  
• prevent double bookings at the same time. (But we’ll use flow instead)

### 3. Process Builder (legacy)

I used flow for automation instead of process Builder.

### 4. Approval Process

Created an Approval Process that admin will Approve or reject the appointment. Bases on these Approval result the status field is changes from pending to Confirmed or Cancelled, then Appropriate flow will execute and sends an email alert.

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### 5. Flow Builder

**Record-Triggered Flows:**

1. **Appointment Flow:** used to send confirmation email to patient when the booking appointment status changes from requesting to Confirm

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1. **Appointment Rejection Flow:** used to send confirmation email to patient when the booking appointment status changes from requesting to Cancelled.

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1. **Prevent Double Bookings:** used to prevent the two patients book the appointment with same Doctor at the same Time.

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1. **Set Follow up Date Flow :** used to perform field update i.e follow up date to one week after from the date of Appointment Completion date.

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1. **Enforce Max Daily Appointment Flow:** used to throw an error when the Patient try to book an appointment with the Doctor who has Completed his Daily limit of appointments.

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1. **Create A task for Doctor Flow and send Custom Notification:** After Admin Approval, it create A task to desired doctor with the appointment details .so they can perform task.

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**Scheduled Flows :**

1. **Send Remainder Emails Daily:** used to send remainder email daily to patients one day before the appointment.

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1. **Send Follow-up Remainder Email:** used to send Follow up emails daily to the Patients Who completed their Appointment Yesterday.

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### 6. Email Alerts

* **Confirmation Email Alert**

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* **Rejection Email Alert**

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* **Appointment Remainder Email Alert**

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* **Follow Up Remainder Email Alert**

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### 7. Field Updates

* After Approval, Appointment Booking status =”Confirmed”.
* After rejection, Appointment Booking status =”Rejected”.
* After change the Appointment Status =”Completed”, Follow-Up date will Update As after one week from completion date of Appointment.

### 8. Tasks

* After Admin approval, created a task to doctor so that they can see their tasks for today, recently completed tasks, pending tasks, after completion mark it as completed etc.

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### 9. Custom Notifications

* Sends a Custom Notification using desktop/mobile channels to assigned Doctor when the appointment is approved by admin.

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