Phase 4: Process Automation

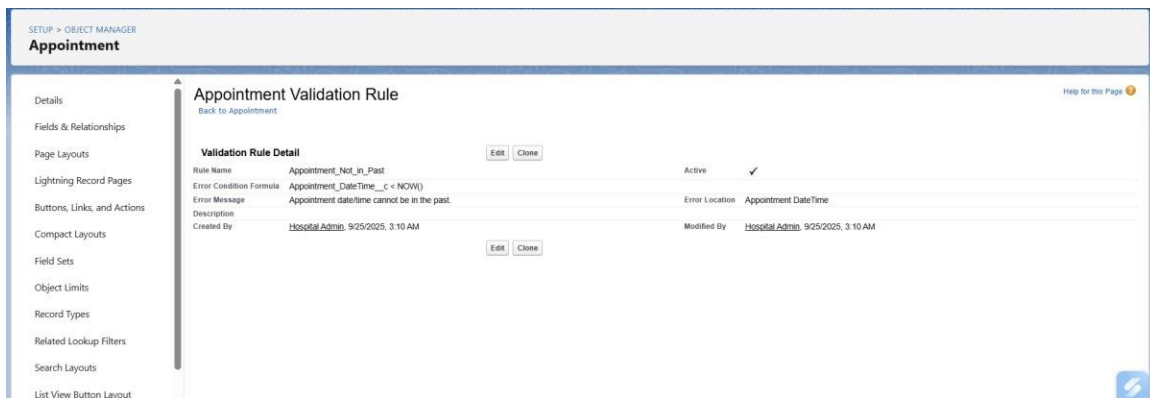## Project Title: SmartCare CRM – Salesforce-Powered Healthcare Management & Patient Engagement Suite

This phase makes the healthcare application functional by automating key business processes for managing patient appointments and doctor notifications.

Validation Rule: Future Appointment Date Required

Purpose: To ensure data quality by preventing users from creating appointments in the past.

How it Works: The rule's formula checks if the Appointment Date/Time is earlier than today. If this condition is met, an error message appears, and the user cannot save the record until a valid future date is selected.
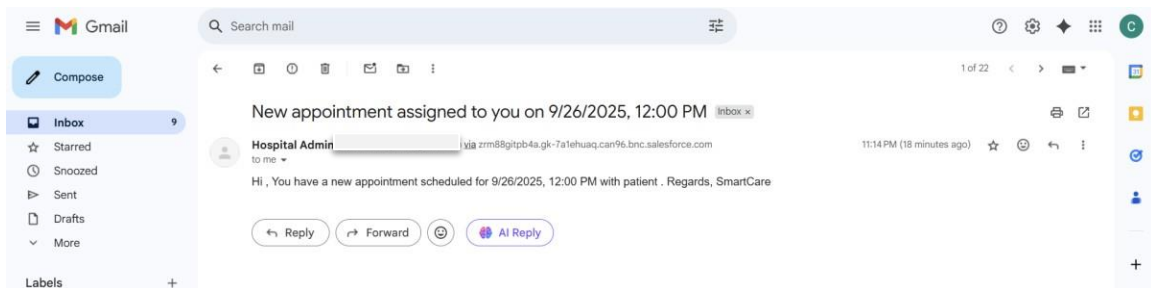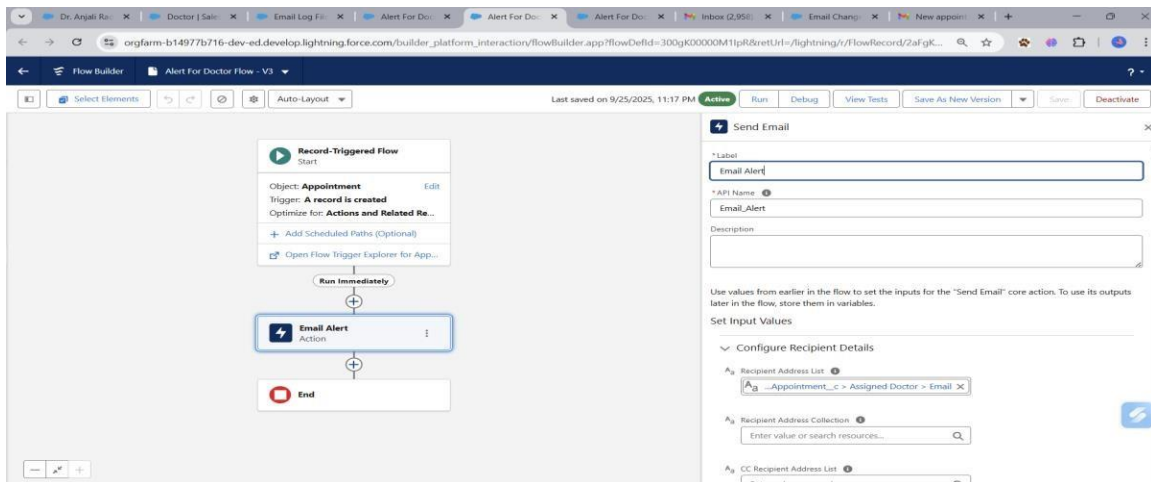

Flow: Doctor Assignment Notification

Purpose: To notify doctors when they are assigned to an appointment.

How it Works: This record-triggered flow runs whenever the Assigned Doctor field changes on an Appointment record. It performs two actions:
○ Sends an email notification to the newly assigned doctor with appointment and patient details.
○ Posts a message to the appointment's Chatter feed so the doctor can view assignment in Salesforce.

Approval Process: Appointment Request Approval

Purpose: To implement a formal approval workflow for patient appointment requests.

How it Works: The approval process can be started for any appointment where the Status is 'Requested'. When submitted:
○ The approval request is automatically routed to the assigned doctor.
○ If approved, the Status updates to 'Confirmed'. If rejected, it updates to 'Cancelled'.