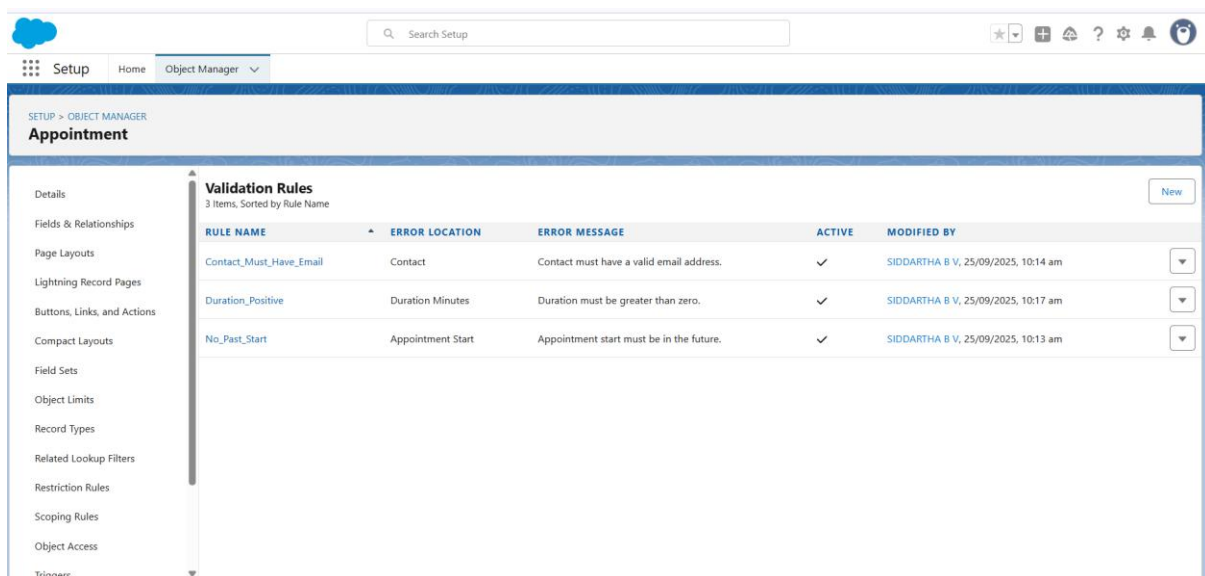


Phase 4: Process Automation – Online Appointment booking for Legal Services

1. Validation Rules – Ensure Data Quality

- **Example 1:** Prevent booking an appointment in the past.
 - Rule: `Appointment_Date__c < TODAY()` → Error Message: *"Appointment date must be today or later."*
- **Example 2:** Ensure mandatory lawyer availability.
 - Rule: If `Lawyer__c` is blank when creating an appointment → Error Message: *"A lawyer must be selected."*



The screenshot shows the Salesforce Setup interface for the 'Appointment' object. The left sidebar lists various setup options, and the main area displays a table of Validation Rules. The table has columns for Rule Name, Error Location, Error Message, Active status, and Modified By. Three rules are listed: 'Contact_Must_Have_Email', 'Duration_Positive', and 'No_Past_Start'.

Validation Rules				
3 Items, Sorted by Rule Name				
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Contact_Must_Have_Email	Contact	Contact must have a valid email address.	✓	SIDDARTHA B V, 25/09/2025, 10:14 am
Duration_Positive	Duration Minutes	Duration must be greater than zero.	✓	SIDDARTHA B V, 25/09/2025, 10:17 am
No_Past_Start	Appointment Start	Appointment start must be in the future.	✓	SIDDARTHA B V, 25/09/2025, 10:13 am

2. Workflow Rules / Process Builder (for legacy orgs)

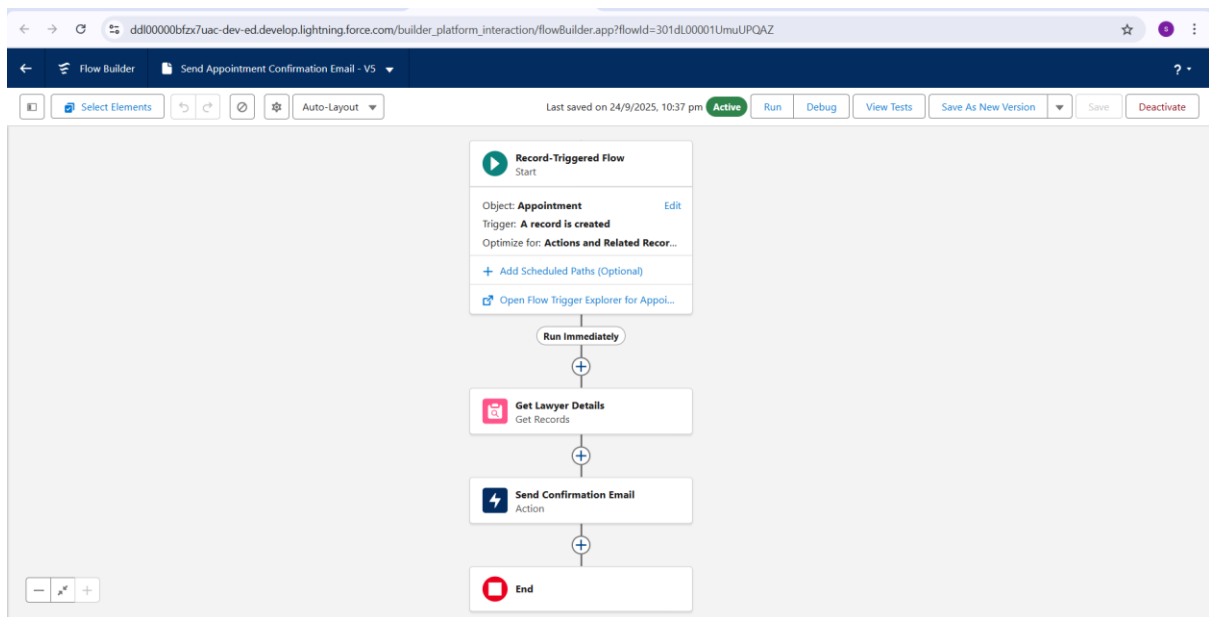
- Send automatic notifications when appointment status changes.
- Example: If `Status__c = Cancelled`, trigger an email to the client.

3. Approval Process – High-Value/High-Risk Cases

- For special services (e.g., Criminal Law / High-Profile Cases), the booking may require approval by an Admin or Senior Partner before confirmation.
- **Entry Criteria:** `Service_Category__c = 'Criminal Law'` OR `Hourly_Cost__c > 10000`.
- **Approver:** Role = Admin / Senior Partner.

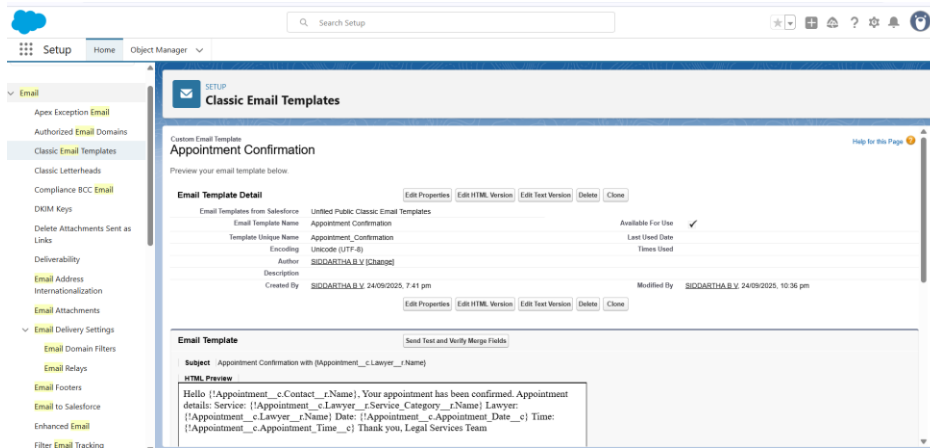
4. Flow Builder

- **Screen Flow (Client Portal):** Collect appointment details, lawyer selection, and show confirmation.
- **Record-Triggered Flow:**
 - On Appointment creation, if Status = Confirmed, send confirmation email + create related task for lawyer.
- **Scheduled Flow:**
 - Send reminder emails 24 hours before the appointment date.
- **Auto-Launched Flow:**
 - Recalculate lawyer availability when a new appointment is booked.



5. Email Alerts

- When appointment is confirmed → send details to client (date, time, lawyer, service).
- When appointment is cancelled → send cancellation email with rebooking options.



6. Field Updates

- Automatically set Appointment_Status__c = Pending when a new record is created.
- Update Lawyer_Availability__c = False if lawyer already has a confirmed appointment at the same date/time.

7. Custom Notifications

- In-App / Push Notification to lawyers when:
 - A new appointment is assigned to them.
 - A client cancels or reschedules.

Outcome of Phase 4

At the end of this phase:

- Appointment scheduling is automated and validated.
- High-risk or high-value cases go through approvals.
- Clients and lawyers receive real-time notifications and reminders.
- Lawyer availability updates automatically, reducing double bookings.
- Tasks keep lawyers organized and accountable.