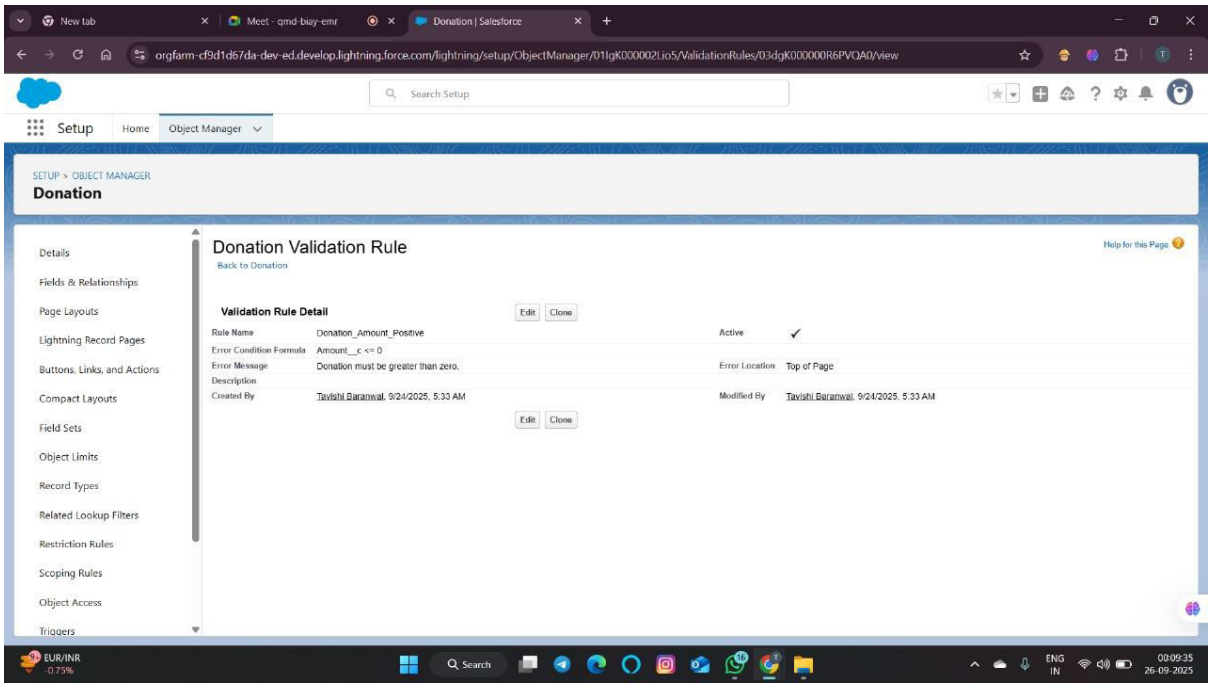
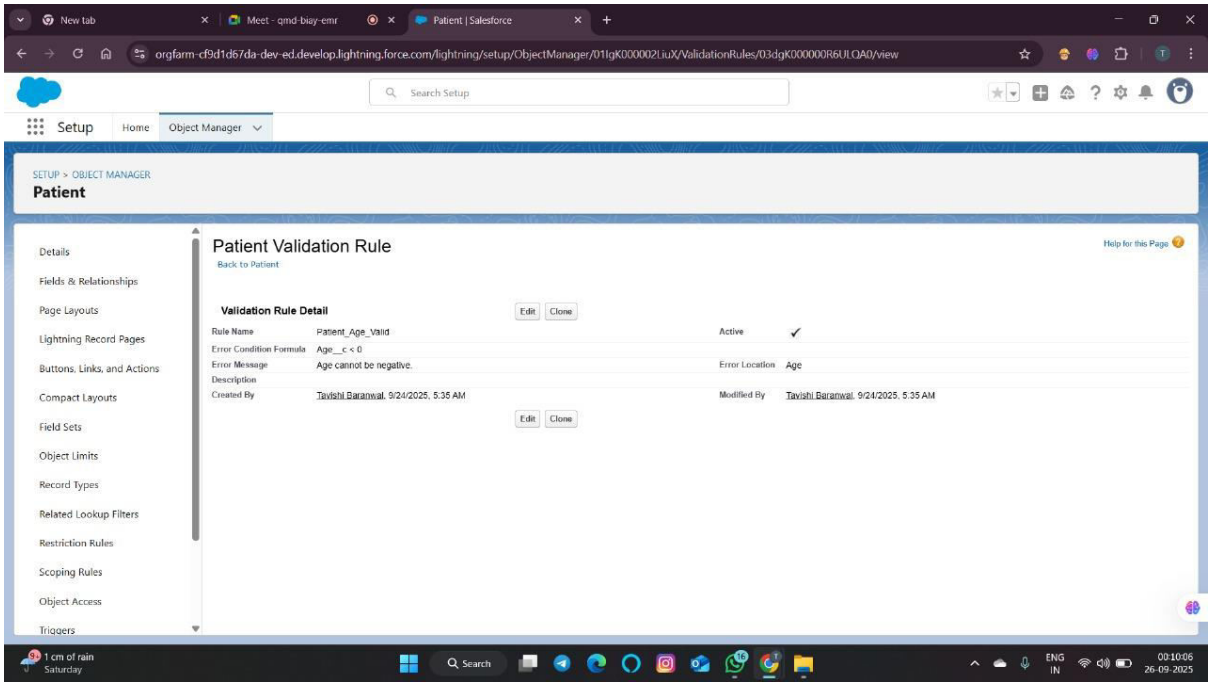
Phase 4: Process Automation (Admin)

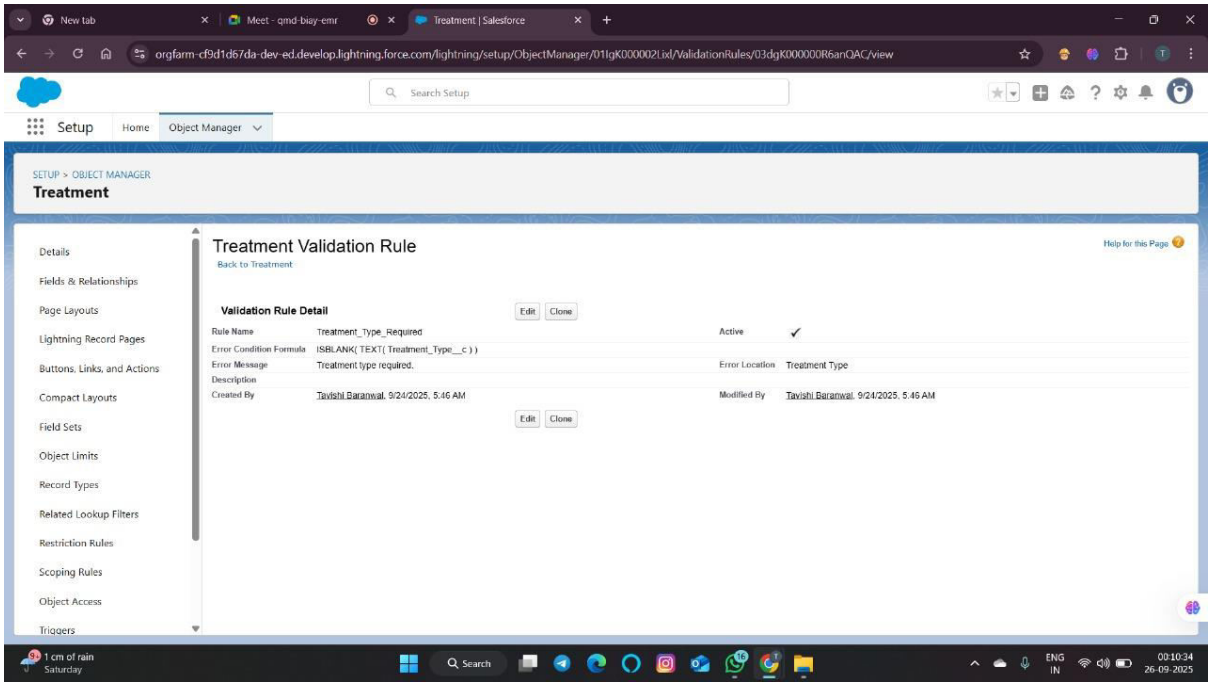
Validation Rules:

Healthcare: Ensure accurate patient data by restricting invalid entries, like birthdates in the future or missing allergy information.

Donation: Enforce correct donation details, like preventing negative pledge amounts or ensuring mandatory donor contact information is filled. Validation rules maintain data accuracy and compliance in both systems.







Workflow Rules:

Healthcare: Automate appointment reminders when a patient record is created or updated.

Donation: Send thank-you emails automatically when a donation is recorded.

Workflow rules streamline repetitive tasks, improving communication and reducing manual effort in healthcare operations and donor management.

Process Builder:

Healthcare: Automate patient follow-up record creation when treatment status changes.

Donation: Automatically update donor status to “Active Supporter” after multiple contributions. Process Builder creates sophisticated, multi-step automation for managing healthcare processes and donor engagement workflows.

Approval Process:

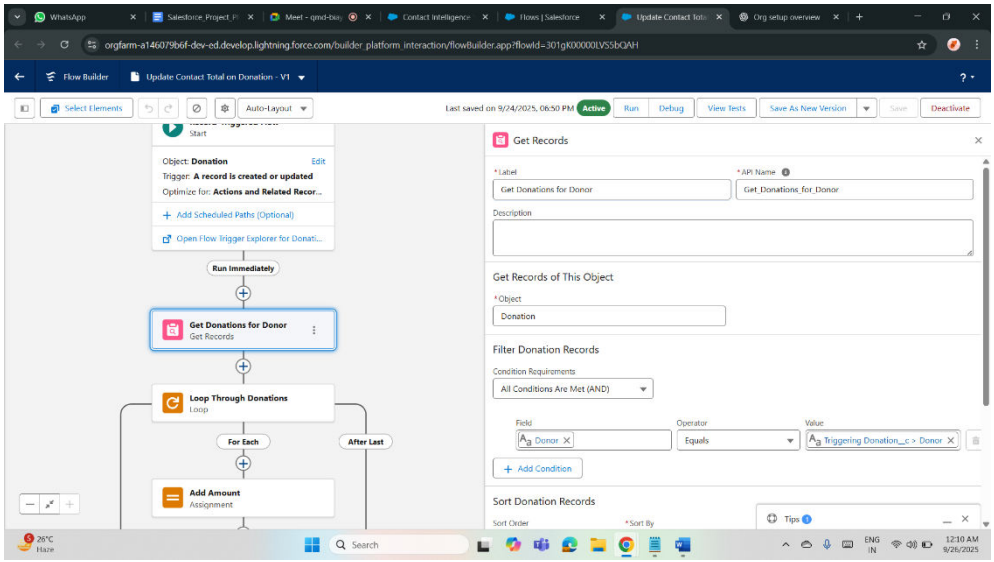
Healthcare: Route treatment plan approvals to senior doctors before implementation.

Donation: Send large donations or grants for finance team approval. Approval processes enforce compliance, accountability, and oversight, ensuring critical actions receive proper authorization before execution.

Flow Builder (Screen, Record-Triggered, Scheduled, Auto-launched):

Healthcare: Screen flows collect patient intake details; record-triggered flows update treatment plans; scheduled flows send reminders; auto-launched flows assign follow-up tasks.

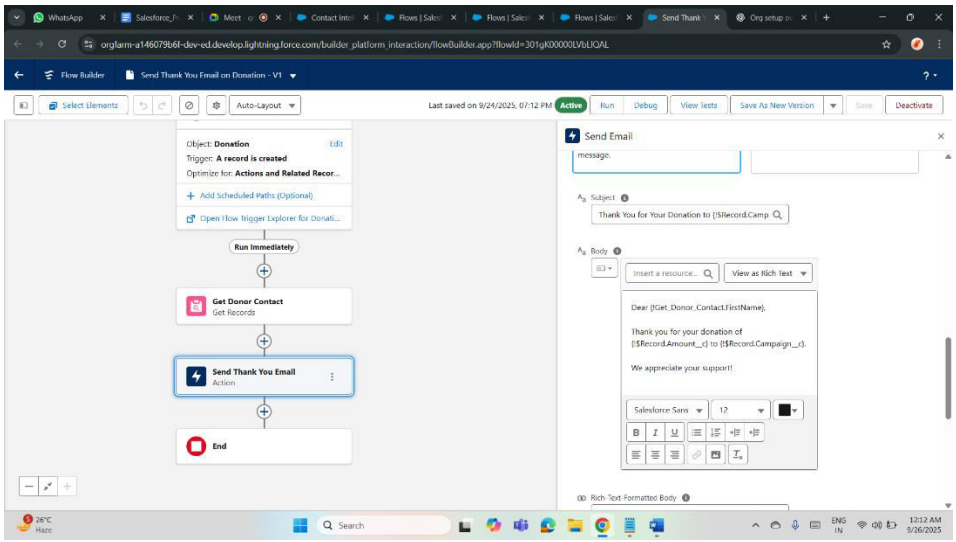
Donation: Screen flows guide volunteers in campaign setup; record-triggered flows update donor tiers; scheduled flows send pledge reminders; auto-launched flows assign campaign tasks.



Email Alerts:

Healthcare: Automatically notify doctors of urgent patient test results.

Donation: Send donors acknowledgment receipts and event invitations. Email alerts improve communication, ensuring stakeholders receive timely, consistent updates aligned with organizational needs.



Field Updates:

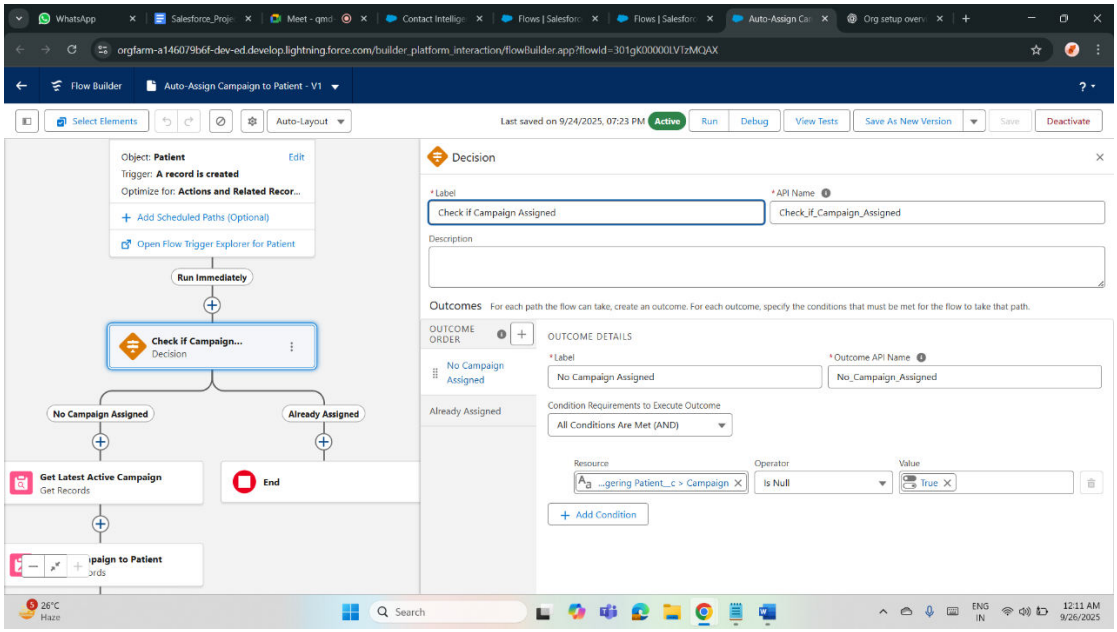
Healthcare: Update patient status to “Discharged” after treatment completion.
Donation: Change donation record status to “Received” after payment confirmation. Automated field updates keep data current and eliminate manual record adjustments.

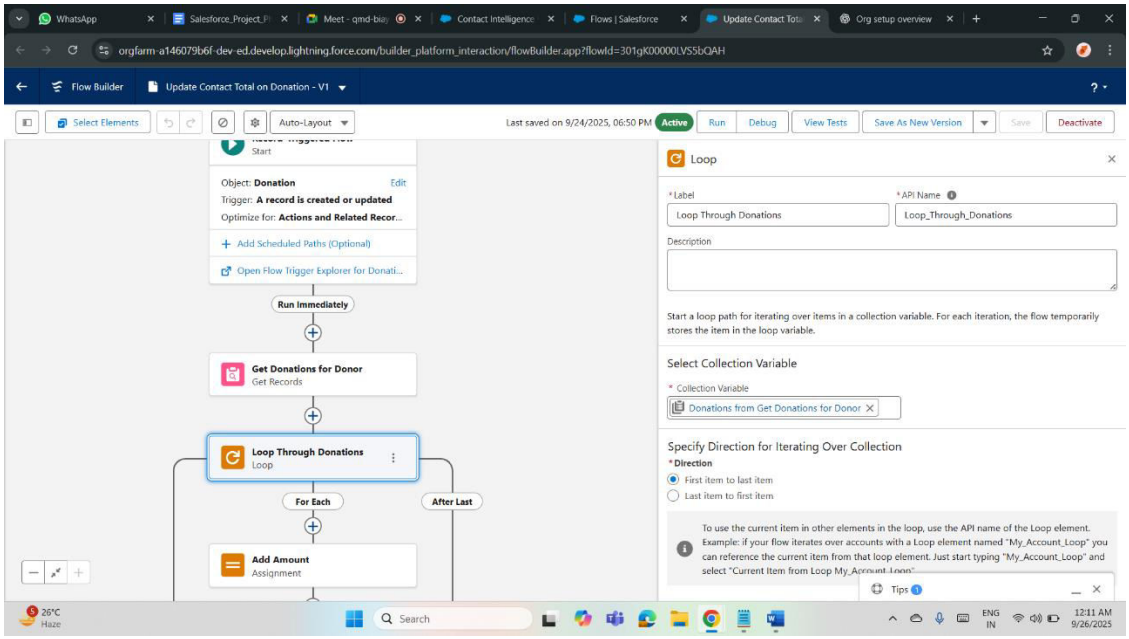
Tasks:

Healthcare: Create tasks for follow-up consultations, medication schedules, or lab result reviews.
Donation: Generate tasks for donor outreach, pledge follow-ups, or campaign activities. Task automation keeps teams organized and ensures accountability.

Custom Notifications:

Healthcare: Send push notifications to staff when a patient is admitted to emergency.
Donation: Notify fundraisers when a high-value donation is pledged. Custom notifications enhance responsiveness by alerting users instantly within Salesforce or on mobile apps.


orgfarm-a146079b6f-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301gK00000LVTzMQAX
Flow Builder
Auto-Assign Campaign to Patient - V1
Select Elements
Auto-Layout
Last saved on 9/24/2025, 07:23 PM
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Object: Patient
Edit
Trigger: A record is created
Optimize for: Actions and Related Recor...
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Patient
Run Immediately
Check if Campaign...
Decision
No Campaign Assigned
Already Assigned
Get Latest Active Campaign
Get Records
End
Decision
*Label
Check if Campaign Assigned
*API Name
Check_if_Campaign_Assigned
Description
Outcomes
For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.
OUTCOME ORDER
No Campaign Assigned
Already Assigned
OUTCOME DETAILS
*Label
No Campaign Assigned
*Outcome API Name
No_Campaign_Assigned
Condition Requirements to Execute Outcome
All Conditions Are Met (AND)
Resource
...gering Patient__c > Campaign
Operator
Is Null
Value
True
Add Condition
Search
ENG
IN
12:11 AM
9/26/2025


orgfarm-a146079b6f-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301gK00000LVS5bQAH
Flow Builder
Update Contact Total on Donation - V1
Select Elements
Auto-Layout
Last saved on 9/24/2025, 06:50 PM
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Start
Object: Donation
Edit
Trigger: A record is created or updated
Optimize for: Actions and Related Recor...
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Donati...
Run Immediately
Get Donations for Donor
Get Records
Loop Through Donations
Loop
For Each
After Last
Add Amount
Assignment
Loop
*Label
Loop Through Donations
*API Name
Loop_Through_Donations
Description
Start a loop path for iterating over items in a collection variable. For each iteration, the flow temporarily stores the item in the loop variable.
Select Collection Variable
* Collection Variable
Donations from Get Donations for Donor
Specify Direction for Iterating Over Collection
*Direction
First item to last item
Last item to first item
To use the current item in other elements in the loop, use the API name of the Loop element. Example: if your flow iterates over accounts with a Loop element named "My_Account_Loop" you can reference the current item from that loop element. Just start typing "My_Account_Loop" and select "Current Item from Loop My_Account_Loop".
Tips
Search
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