

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.

Step 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.

Error Condition Formula

Example: `Discount_Percent__c > 0.30` [More Examples...](#)

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

Insert Field Insert Operator ▾

```
AND (
  ISPICKVAL(Status__c, "Scheduled"),
  NOT (ISBLANK(Appointment_DateTime__c)),
  NOT (ISBLANK(Doctor__c))
)
```

Check Syntax

Functions

-- All Function Categories -- ▾

ABS

ACOS

ADDMONTHS

AND

ASCII


ASIN

Insert Selected Function

ABS(number)

Returns the absolute value of a number, a number without its sign

[Help on this function](#)



★ ▾


+

🏠

?

⚙️


🔔



Setup

Home

Object Manager ▾

 **SETUP**
Object Manager

Appointment Validation Rule

[Back to Appointment](#) [Help for this Page](#)

Validation Rule Detail Edit Clone

Rule Name	Prevent_Double_Booking	Active	✓
Error Condition Formula	AND(ISPICKVAL(Status__c, "Scheduled"), ISBLANK(Date_Time__c), ISBLANK(Doctor__c))		
Error Message	Doctor and Appointment Date/Time are required for a Scheduled appointment.	Error Location	Date/Time
Description	Prevents a doctor from being booked for two appointments at the same date and time.		
Created By	Akshitha Lakshmireddygar, 9/18/2025, 9:53 AM	Modified By	Akshitha Lakshmireddygar, 9/18/2025, 9:53 AM

Edit Clone

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

The screenshot shows the Salesforce interface for editing an email template. The top navigation bar includes a search bar and various utility icons. The main navigation menu lists Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, and a tab for 'Appointment Confirmation'. The page title is 'Email Template Appointment Confirmation'. On the right, there are buttons for 'Edit', 'Clone', 'Delete', and a dropdown arrow. The 'Details' tab is selected, showing a form with two sections: 'Information' and 'Message Content'. The 'Information' section contains fields for 'Email Template Name' (Appointment Confirmation), 'Description', 'Related Entity Type' (Appointment), 'Folder' (Private Email Templates), and a checkbox for 'Made in Email Template Builder'. The 'Message Content' section contains fields for 'Subject' (Your Appointment is Confirmed), 'Enhanced Letterhead', and 'HTML Value'. A 'To Do List' icon is visible at the bottom left.

Information	
Email Template Name	Appointment Confirmation
Description	
Made in Email Template Builder	<input type="checkbox"/>
Related Entity Type	Appointment
Folder	Private Email Templates

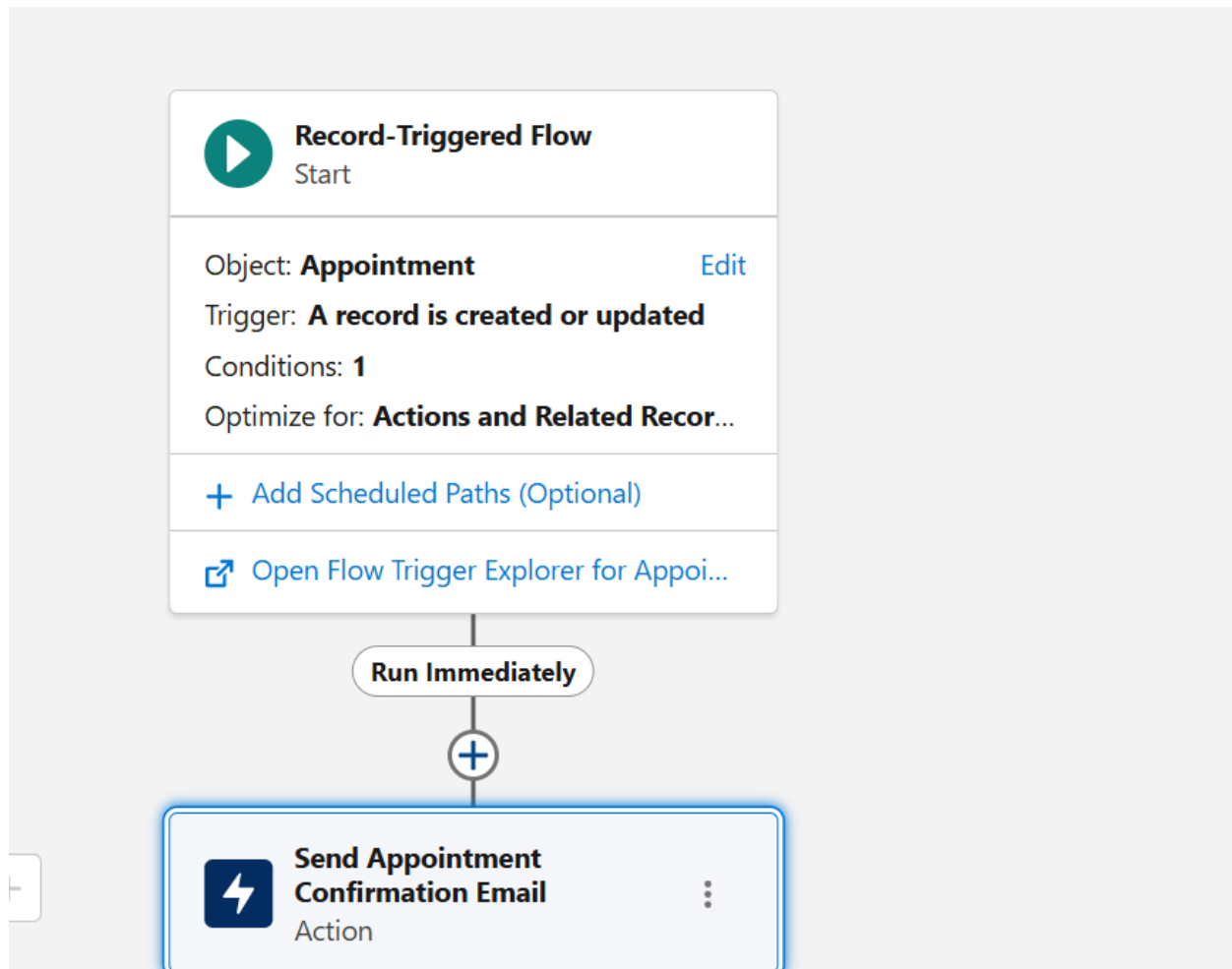
Message Content	
Subject	Your Appointment is Confirmed
Enhanced Letterhead	
HTML Value	

Step 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:
 - o Update “Confirmation Sent” checkbox on the Appointment.
 - o 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.



Step 4: Reminder Notification & Email (Scheduled Path)

A separate Appointment Reminder 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.

Step 5: 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.

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', and 'More'. The 'Tasks' tab is selected, showing a 'Recently Viewed' list with one item: 'Email' by Akshitha Lakshmireddygari, dated 9/18/2025. The main view displays the details of the 'Email' task, which is marked as 'Completed'. The details include: Assigned To (Akshitha Lakshmireddygari), Subject (Email), Due Date (9/18/2025), Priority (Normal), Status (Completed), Name (Akshitha Lakshmireddygari), and Related To (regular chechup).

Step 6: 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.

The screenshot shows the Salesforce Lightning interface with the 'Appointments' tab selected. The main view displays the details of an appointment named 'regular chechup'. The details include: Appointment Name (regular chechup), Appointment ID (APP-0001), Date/Time (9/19/2025, 12:00 PM), Purpose / Reason (stomach pain), Status (Scheduled), Patient (Arjun), and Doctor (Akshitha Lakshmireddygari). The right sidebar shows the 'Activity' section with a filter for 'All time • All activities • All types' and a list of upcoming activities, including an email notification for 'Sep 18'.