

Phase 4: Process Automation (Admin)

1. Validation Rules

Purpose: Ensure data integrity and prevent incorrect entries.

Examples:

- **Appointment outside business hours**
- **Mandatory fields check** – Patient & Doctor must be selected.
- **Prevent double booking** – Same doctor, same time slot.

Patient:

Validation Rules					New
3 Items, Sorted by Rule Name					
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Patient_Age_Validation	Age	Patient age cannot be negative.	✓	Atharva Gulhane, 9/20/2025, 11:25 PM	▼
Patient_Email_Required	Email	Patient email is required.	✓	Atharva Gulhane, 9/20/2025, 11:28 PM	▼
Patient_Phone_Format	Phone	Enter a valid 10-digit phone number.	✓	Atharva Gulhane, 9/20/2025, 11:30 PM	▼

Doctor:

Validation Rules					New
2 Items, Sorted by Rule Name					
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Doctor_Email_Required	Email	Doctor email is required.	✓	Atharva Gulhane, 9/20/2025, 11:33 PM	▼
Doctor_Specialty_Required	Specialization	Doctor specialty must be selected.	✓	Atharva Gulhane, 9/20/2025, 11:37 PM	▼

Appointment:

Validation Rules					New
3 Items, Sorted by Rule Name					
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Appointment_Date_Validation	Appointment Date & Time	Appointment cannot be scheduled in the past.	✓	Atharva Gulhane, 9/20/2025, 11:44 PM	▼
Appointment_Doctor_Overlap	Top of Page	Doctor and Appointment Date & Time must be filled.	✓	Atharva Gulhane, 9/20/2025, 11:49 PM	▼
Appointment_Time_Validation	Top of Page	Appointment end time must be after start time.	✓	Atharva Gulhane, 9/20/2025, 11:46 PM	▼

2.Workflow Rules

Purpose: Automate simple actions based on record changes.

Examples:

- When **Appointment__c.Status = Cancelled**, send **cancellation email** to patient & doctor.
- When **Prescription__c is created**, notify the patient.

3.Actions Supported:

- Email Alerts
- Field Updates
- Task Creation

SETUP
Email Alerts

All Email Alerts [Help for this Page](#)

Email alerts are used to send emails from a flow or other automation.

View: **All Email Alerts** [Create New View](#)

Action	Description ↑	Email Template Name	Object	Last Modified Date
Edit Del	Email sent to patient and doctor when an appointment is confirmed.	Appointment_Confirmation_Template	Appointment	9/21/2025
Edit Del	Send Welcome Email to Patient	Patient_Welcome_Email	Patient	9/21/2025

5. Flow Builder

a) Screen Flow

- Interactive booking wizard for receptionists or patients
- Collect patient info, select doctor, choose time slot, confirm booking

b) Record-Triggered Flow

- Trigger: Appointment creation or update
- Actions:
 - Update Patient's next appointment date
 - Send Email/SMS notification to patient & doctor

c) Scheduled Flow

- Trigger: Daily at 8:00 AM
- Actions:
 - Send daily appointment reminders
 - Update status of past appointments to "Completed"

d) Auto-Launched Flow

- Triggered by integration processes (API calls for SMS/email)
- Runs without user interaction

Flow Definitions

All Flows

7 items • Sorted by Flow Label • Filtered by All flow definitions • Last Modified By • Updated a few seconds ago

Flow Label	Process Type	A...	Te...	Package State	P...	Last Modified By	Last Modified ...
Appointment Confir...	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Athanva Gulhane	9/21/2025, 11:59 PM
Appointment Follow...	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Athanva Gulhane	9/22/2025, 10:14 A...
Assign Receptionist ...	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Athanva Gulhane	9/26/2025, 8:37 PM
Daily Appointment S...	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Athanva Gulhane	9/22/2025, 10:20 A...
Missed Appointment...	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Athanva Gulhane	9/22/2025, 10:43 A...
Notify_Doctor_New_...	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Athanva Gulhane	9/22/2025, 12:43 A...
Patient Record Auto...	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Athanva Gulhane	9/21/2025, 12:42 PM

6. Email Alerts

Templates created for:

- Appointment Confirmation
- Appointment Reminder
- Appointment Cancellation
- Prescription Ready

Sent automatically through flows, workflow, or process builder

