Phase 4: Process Automation (Admin)
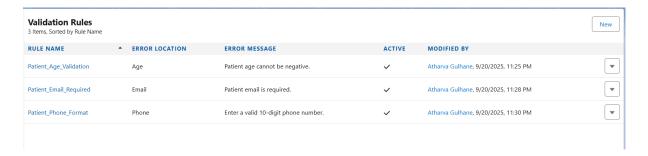
1. Validation Rules

Purpose: Ensure data integrity and prevent incorrect entries.
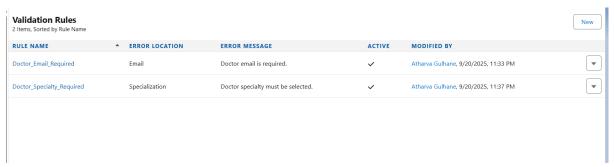
Examples:

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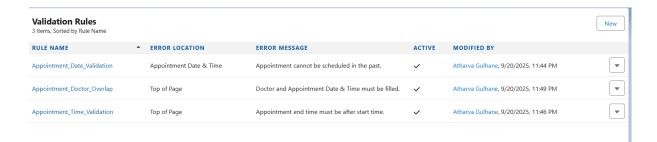- **Prevent double booking** – Same doctor, same time slot.

Patient:

Validation Rules
3 Items, Sorted by Rule Name   New

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
2 Items, Sorted by Rule Name   New

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
3 Items, Sorted by Rule Name   New

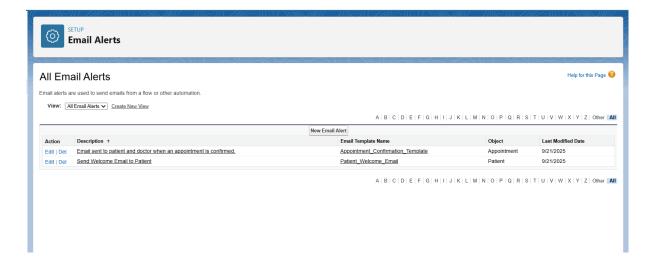| RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Appointment_Date_Validation	Appointment Date & Time	Appointment cannot be scheduled in the past.	✓	Atharva Gulhane, 9/20/2025, 11:44 PM	▾
Appointment_Doctor_Overlap	Top of Page	Doctor and Appointment Date & Time must be filled.	✓	Atharva Gulhane, 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

5. Flow Builder

a) Screen Flow

- Interactive booking wizard for receptionists or patients
- Collect patient info, select doctor, choose time slot, confirm booking
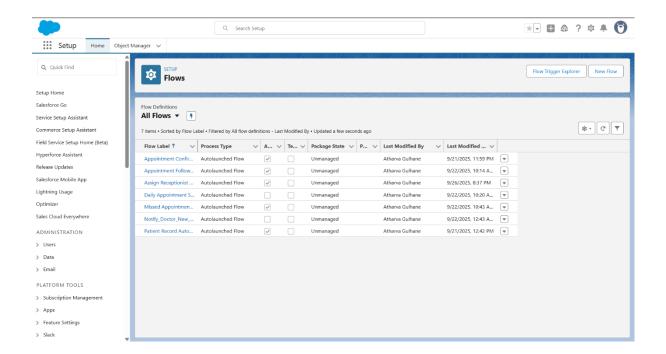
b) Record-Triggered Flow

- 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

6. Email Alerts

Templates created for:

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

Sent automatically through flows, workflow, or process builder