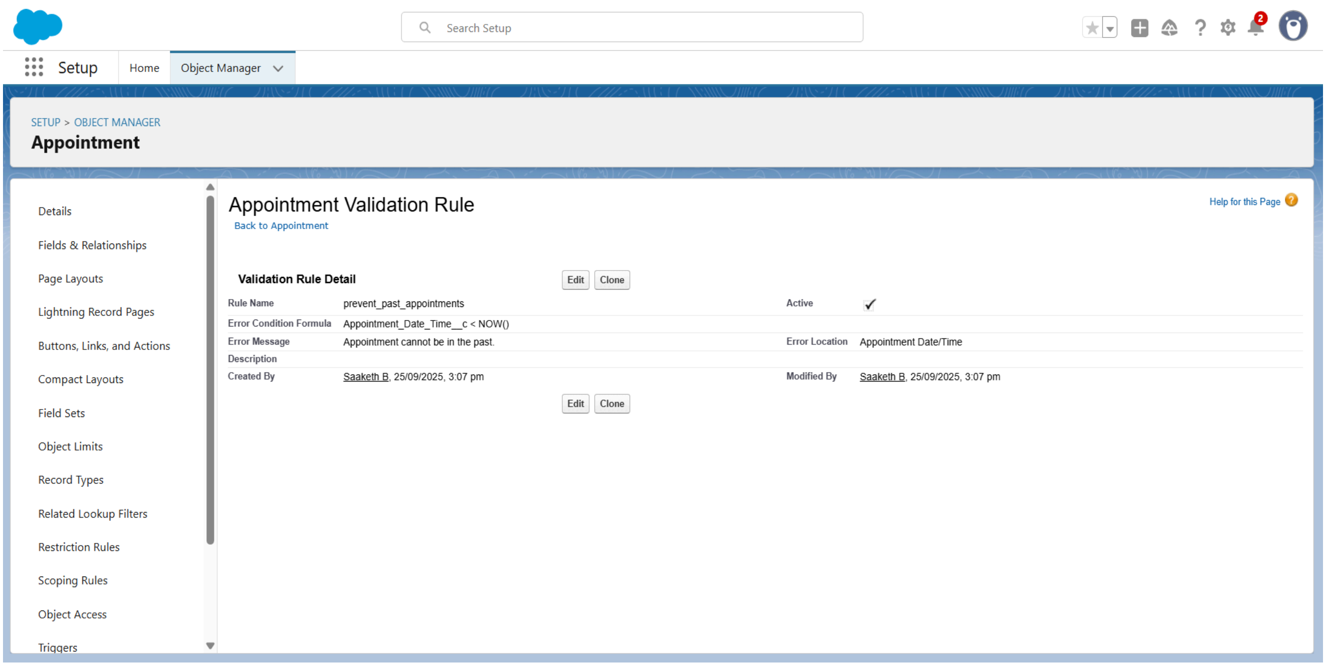
Phase 4 — Process Automation

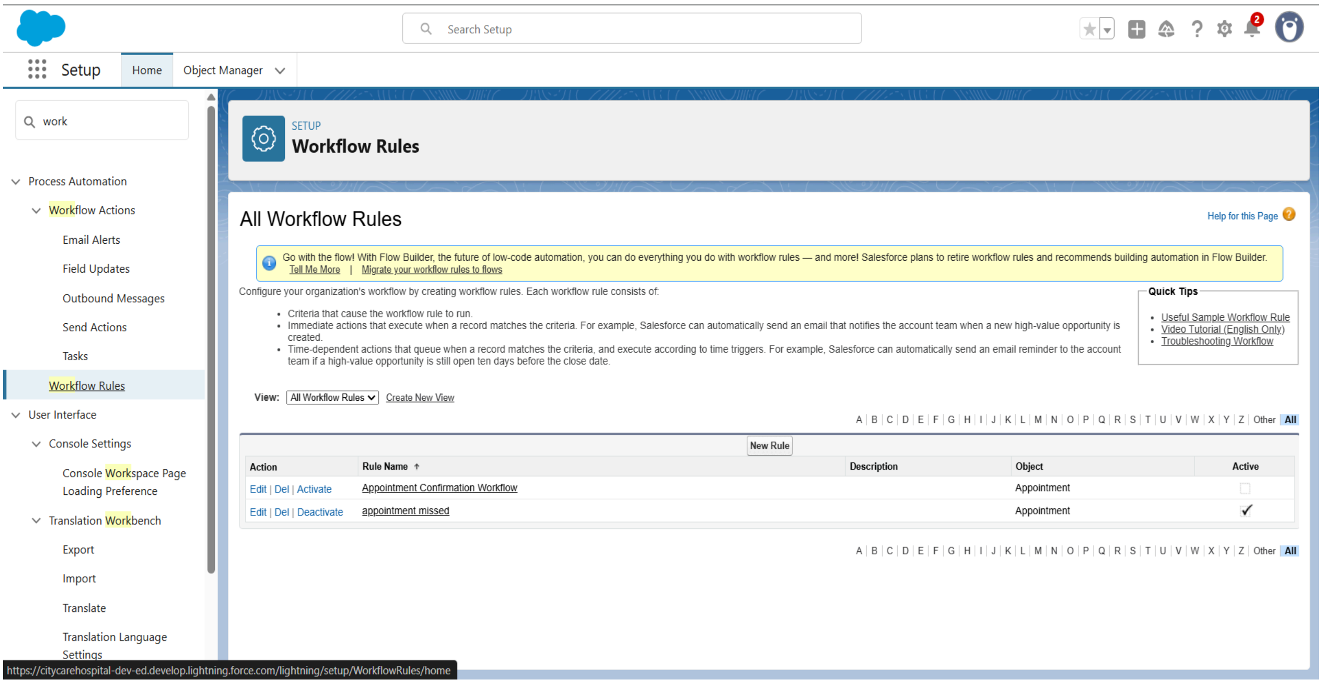
1) Validation Rules

- Created a validation to prevent saving Appointments in the past.
- Formula used: `Appointment_DateTime__c < NOW()`.
- Shows error if Receptionist/Doctor tries to book old dates.



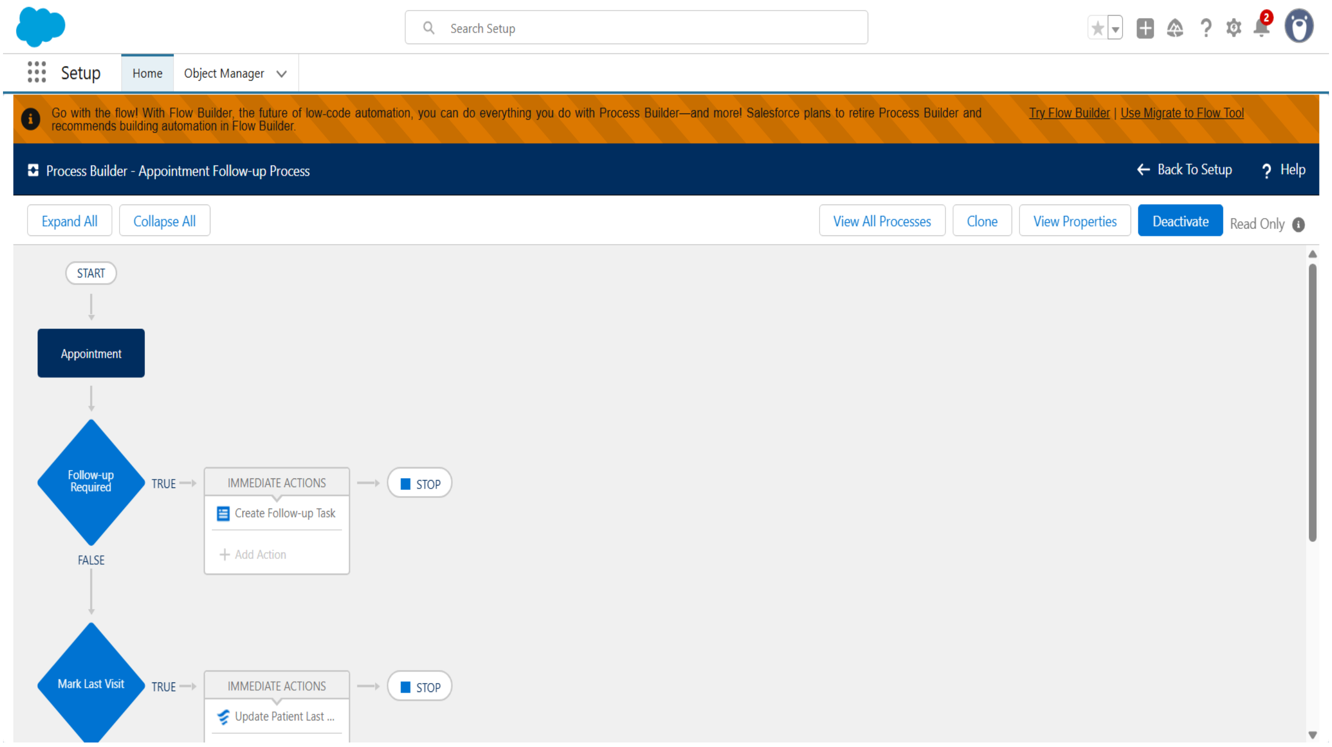
2) Workflow Rules

- Configured Workflow on Appointment object.
- Trigger: Appointment Status = “Scheduled”.
- Action: Sent confirmation email to Patient using email alert.



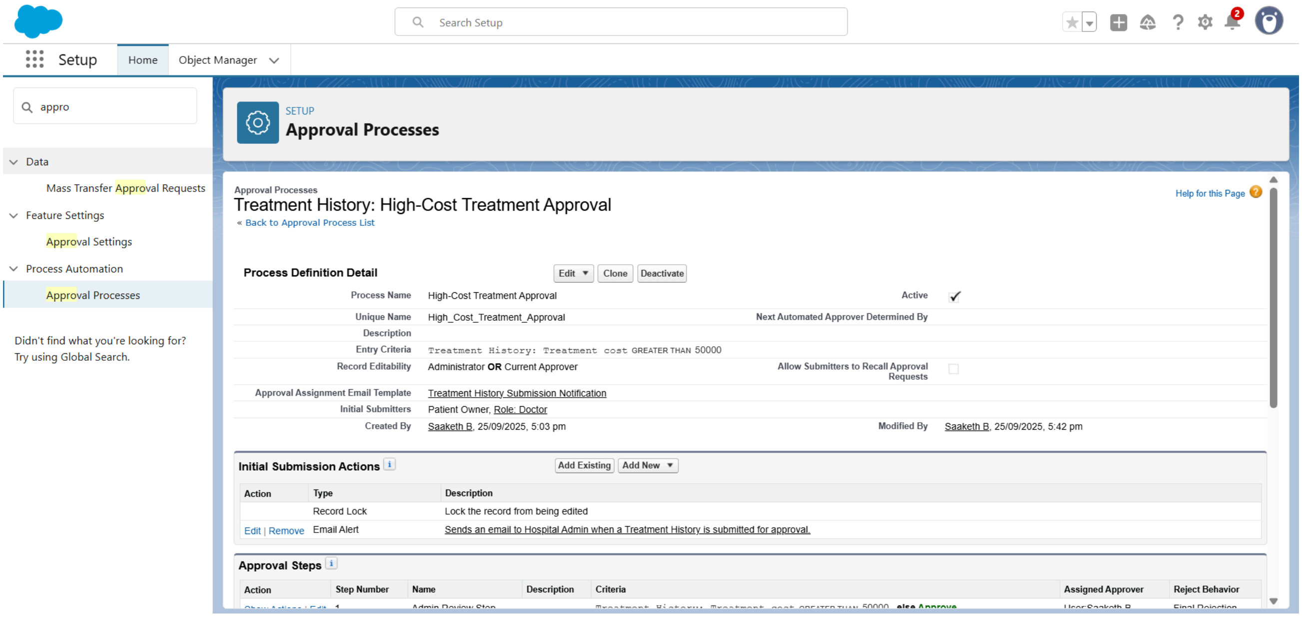
3) Process Builder

- Built Appointment Process with multiple criteria branches.
- Criteria 1: Follow-up Required → Created Doctor follow-up Task.
- Criteria 2: Status = Completed → Called Auto-Launched Flow to update Patient's Last Visit.



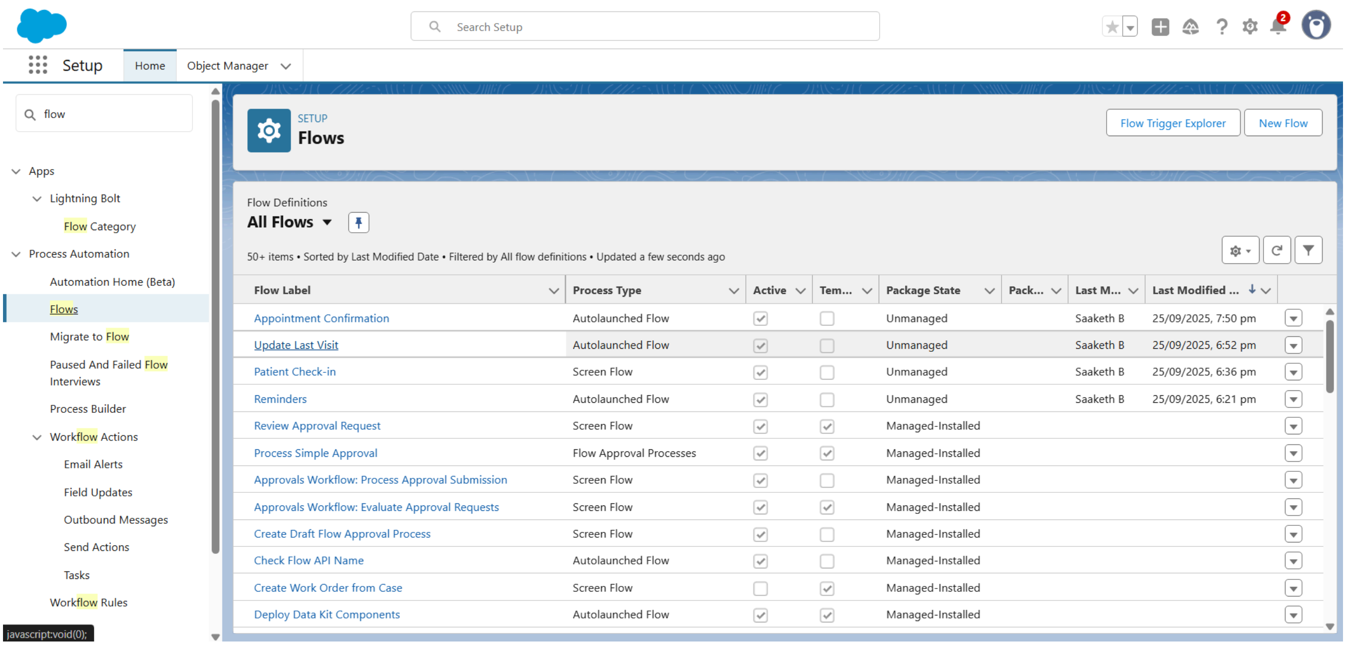
4) Approval Process

- Applied to Treatment_History__c object.
- Entry Criteria: High-cost treatments require Admin approval.
- Actions: Sent approval email, updated status, and notified user on approval/rejection.



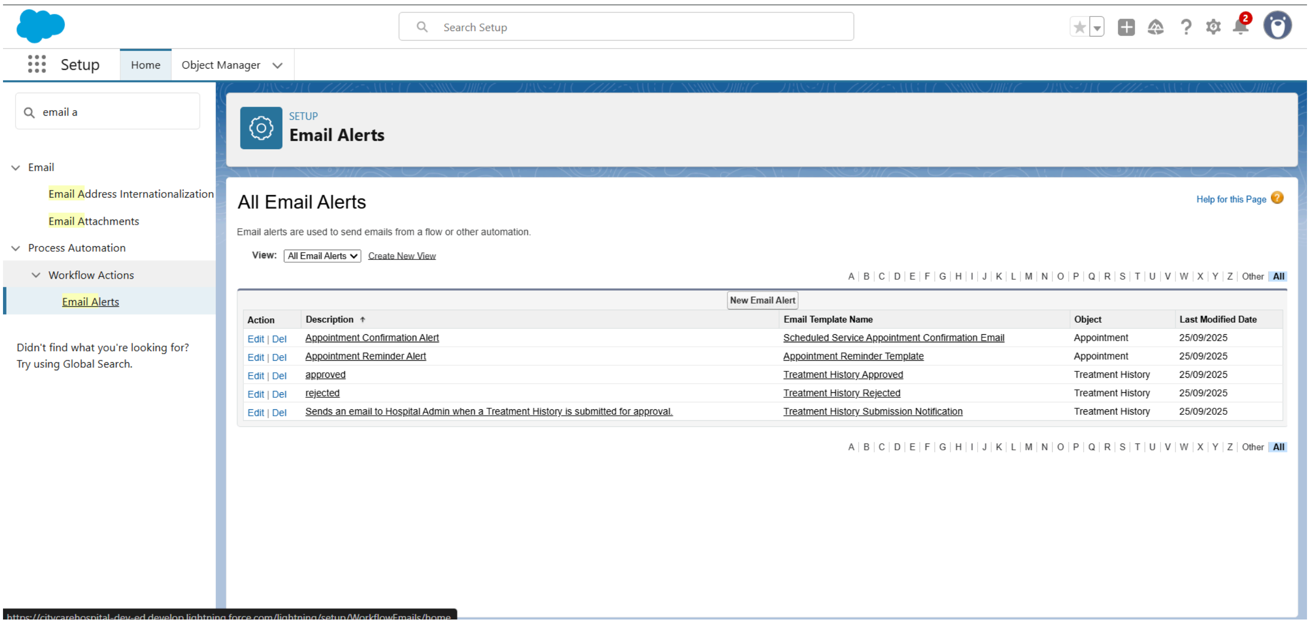
5) Flow Builder

- Record-Triggered Flow on Appointment__c.
- Sent Appointment Confirmation Email and Custom Notification.
- Also used Auto-Launched Flow to update Patient's Last Visit date.



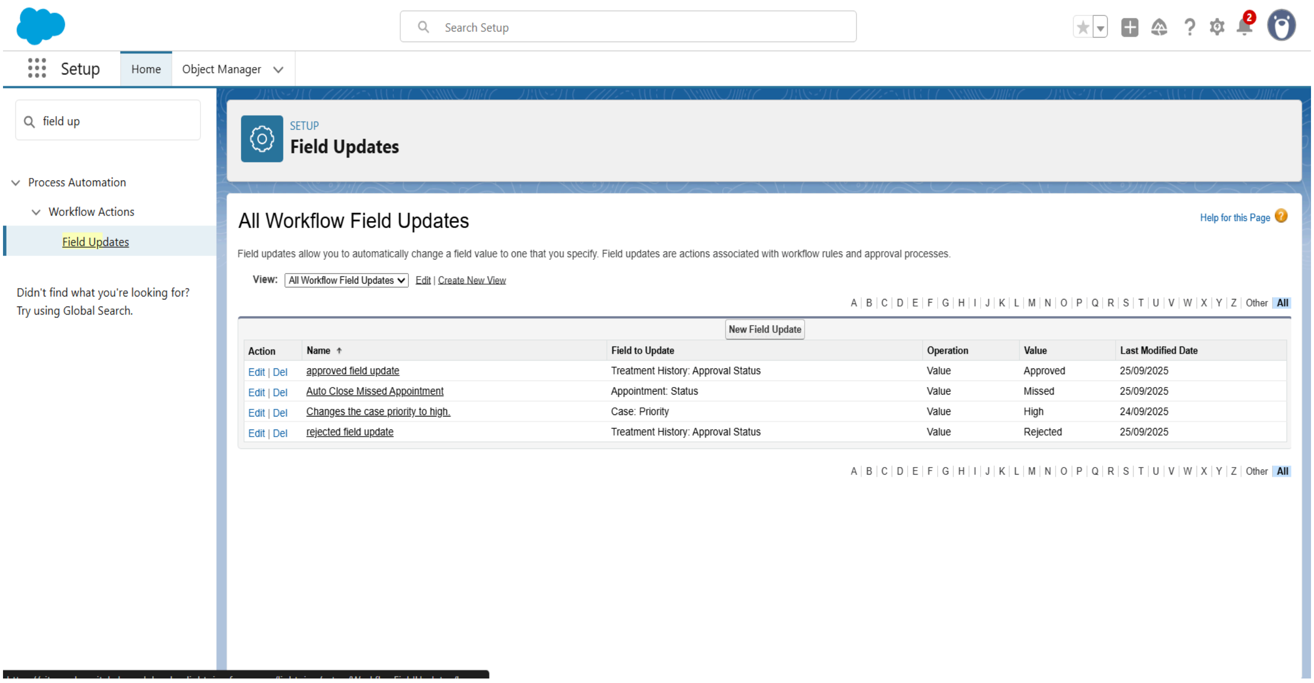
6) Email Alerts

- Created Appointment Confirmation Email Alert.
- Used in Workflow and Flow to notify Patients.
- Also created Approval Outcome email alerts (Approved/Rejected).



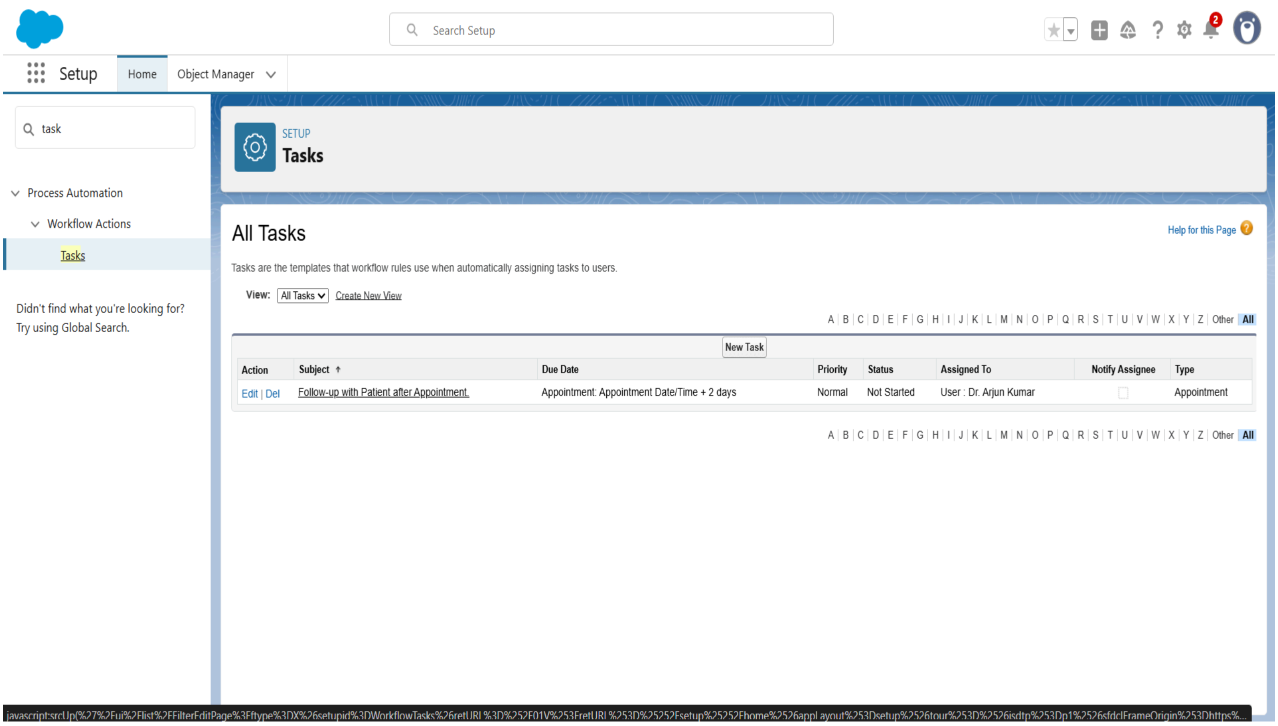
7) Field Updates

- Workflow Rule marked Appointment as “Missed” if scheduled time < NOW and status still Scheduled.
- Ensured missed appointments are tracked automatically.



8) Tasks

- Automated Task creation for Doctor follow-up.
- Task assigned to Doctor with Subject “Follow-up with Patient after Appointment”.
- Due Date = Appointment Date + 2 days.



9) Custom Notifications

- Built Custom Notification: Appointment Reminder Notification.
- Triggered from Appointment Flow when new appointment is created.
- Sent notification to Receptionist/Doctor in Salesforce app.