

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.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and several utility icons. Below the navigation bar, the "Setup" menu is open, showing "Home" and "Object Manager". The "Object Manager" page is selected, displaying a list of object types on the left sidebar: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Object Access, and Triggers. The main content area is titled "Appointment Validation Rule" and includes a "Back to Appointment" link. Below the title, there is a "Validation Rule Detail" section with a table of rule information. The table has columns for Rule Name, Error Condition Formula, Error Message, Error Location, Description, Created By, Modified By, and Active. The rule is named "prevent_past_appointments", is active, and has the formula "Appointment_Date_Time__c < NOW()". The error message is "Appointment cannot be in the past." and the error location is "Appointment Date/Time". The rule was created by "Saaketh B." on 25/09/2025 at 3:07 pm and was last modified by the same user at the same time. There are "Edit" and "Clone" buttons next to the rule name and the "Created By" field.

Validation Rule Detail							
Rule Name	prevent_past_appointments	Active	✓				
Error Condition Formula	Appointment_Date_Time__c < NOW()			Error Location	Appointment Date/Time		
Error Message	Appointment cannot be in the past.						
Description							
Created By	Saaketh B. 25/09/2025, 3:07 pm			Modified By	Saaketh B. 25/09/2025, 3:07 pm		

2) Workflow Rules

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

Workflow Rules

All Workflow Rules

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

Quick Tips

- [Useful Sample Workflow Rule](#)
- [Video Tutorial \(English Only\)](#)
- [Troubleshooting Workflow](#)

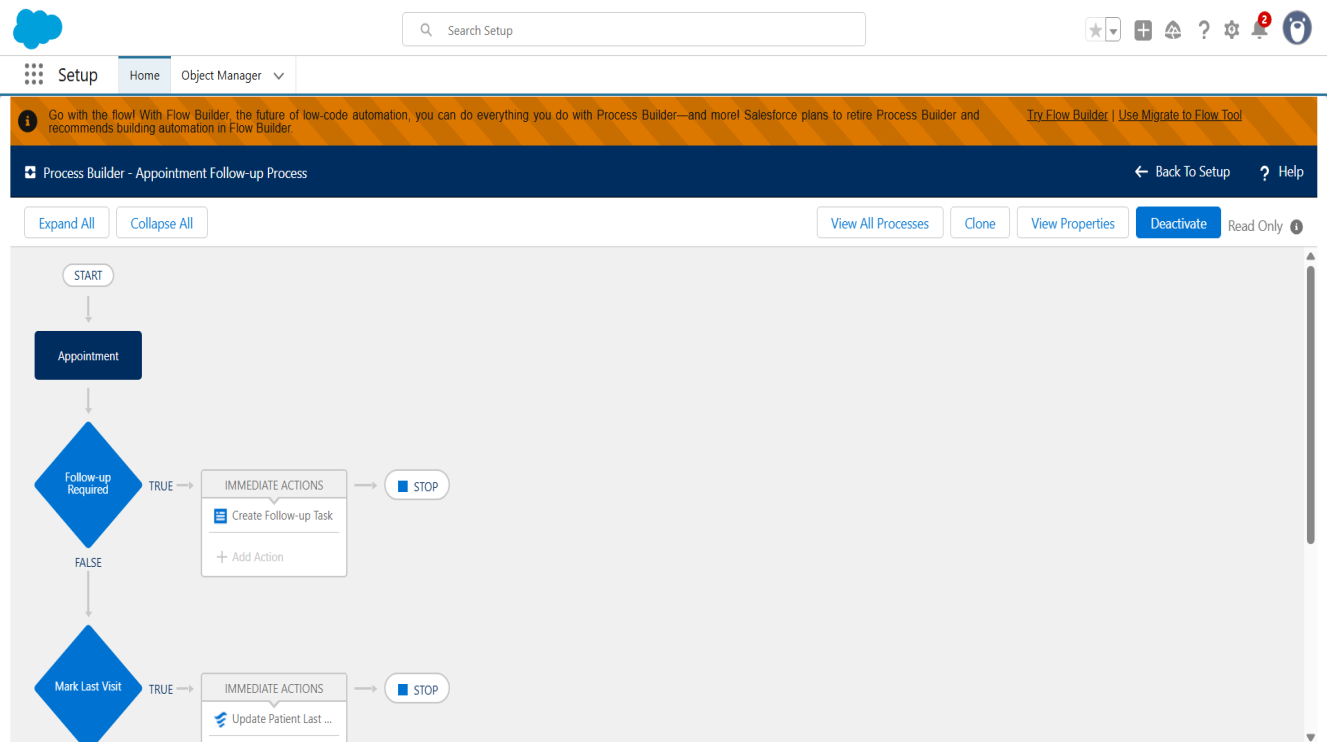
View: **All Workflow Rules** | [Create New View](#)

Action	Rule Name	Description	Object	Active
Edit Del Activate	Appointment Confirmation Workflow		Appointment	<input type="checkbox"/>
Edit Del Deactivate	appointment_missed		Appointment	<input checked="" type="checkbox"/>

<https://citycarehospital-dev-ed.develop.lightning.force.com/lightning/setup/WorkflowRules/home>

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.



- The screenshot displays the Microsoft Dynamics 365 Setup interface. On the left is a navigation pane with options like Apps, Lightning Bolt, Flow Category, Process Automation, Automation Home (Beta), Flows, Migrate to Flow, Paused And Failed Flow Interviews, Process Builder, Workflow Actions, Email Alerts, Field Updates, Outbound Messages, Send Actions, Tasks, and Workflow Rules. The main area shows the 'Flows' setup page with a search bar at the top right containing 'Search Setup'. Below the search bar are tabs for 'Flow Trigger Explorer' and 'New Flow'. The 'All Flows' section lists various flow definitions in a table.

Flow Label	Process Type	Active	Tem...	Package State	Pack...	Last M...	Last Modified ...
Appointment Confirmation	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Saaketh B	25/09/2025, 7:50 pm	[Dropdown]
Update Last Visit	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Saaketh B	25/09/2025, 6:52 pm	[Dropdown]
Patient Check-in	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Saaketh B	25/09/2025, 6:36 pm	[Dropdown]
Reminders	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Saaketh B	25/09/2025, 6:21 pm	[Dropdown]
Review Approval Request	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			[Dropdown]
Process Simple Approval	Flow Approval Processes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			[Dropdown]
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			[Dropdown]
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			[Dropdown]
Create Draft Flow Approval Process	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			[Dropdown]
Check Flow API Name	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			[Dropdown]
Create Work Order from Case	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			[Dropdown]
Deploy Data Kit Components	Autolaunched Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			[Dropdown]

6) Email Alerts

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

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'email a' and a navigation menu with 'Email' expanded, showing 'Email Address Internationalization', 'Email Attachments', 'Process Automation', and 'Workflow Actions' with 'Email Alerts' selected. The main content area is titled 'Email Alerts' and shows a list of email alerts. The list has columns for Action, Description, Email Template Name, Object, and Last Modified Date. The list is filtered to show 'All Email Alerts' and includes a 'New Email Alert' button. The list contains five entries: 'Appointment Confirmation Alert', 'Appointment Reminder Alert', 'approved', 'rejected', and 'Sends an email to Hospital Admin when a Treatment History is submitted for approval'.

Action	Description	Email Template Name	Object	Last Modified Date
Edit Del	Appointment Confirmation Alert	Scheduled Service Appointment Confirmation Email	Appointment	25/09/2025
Edit Del	Appointment Reminder Alert	Appointment Reminder Template	Appointment	25/09/2025
Edit Del	approved	Treatment History Approved	Treatment History	25/09/2025
Edit Del	rejected	Treatment History Rejected	Treatment History	25/09/2025
Edit Del	Sends an email to Hospital Admin when a Treatment History is submitted for approval.	Treatment History Submission Notification	Treatment History	25/09/2025

7) Field Updates

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Setup icon, tabs for Setup, Home, and Object Manager, and a search bar labeled "Search Setup". On the right side of the header are icons for favorites, a plus sign, help, settings, notifications, and a user profile.

In the left sidebar, under "Process Automation", the "Workflow Actions" section is expanded, and "Field Updates" is highlighted. Below this, there is a message: "Didn't find what you're looking for? Try using Global Search."

The main content area is titled "Field Updates" with a gear icon. It contains the heading "All Workflow Field Updates" and a link to "Help for this Page". A descriptive paragraph states: "Field updates allow you to automatically change a field value to one that you specify. Field updates are actions associated with workflow rules and approval processes." Below this is a "View:" dropdown set to "All Workflow Field Updates" and links to "Edit" and "Create New View".

A table titled "New Field Update" displays the following data:

Action	Name ↑	Field to Update	Operation	Value	Last Modified Date
Edit Del	approved_field_update	Treatment History: Approval Status	Value	Approved	25/09/2025
Edit Del	Auto Close Missed Appointment	Appointment: Status	Value	Missed	25/09/2025
Edit Del	Changes the case priority to high	Case: Priority	Value	High	24/09/2025
Edit Del	rejected_field_update	Treatment History: Approval Status	Value	Rejected	25/09/2025

Below the table is an alphabetical index from A to Z, followed by "Other" and a link to "All".

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.

Setup

Home

Object Manager

task

Process Automation

Workflow Actions

Tasks

Didn't find what you're looking for?

Try using Global Search.

Search Setup

SETUP

Tasks

All Tasks

Help for this Page

Tasks are the templates that workflow rules use when automatically assigning tasks to users.

View:

All Tasks

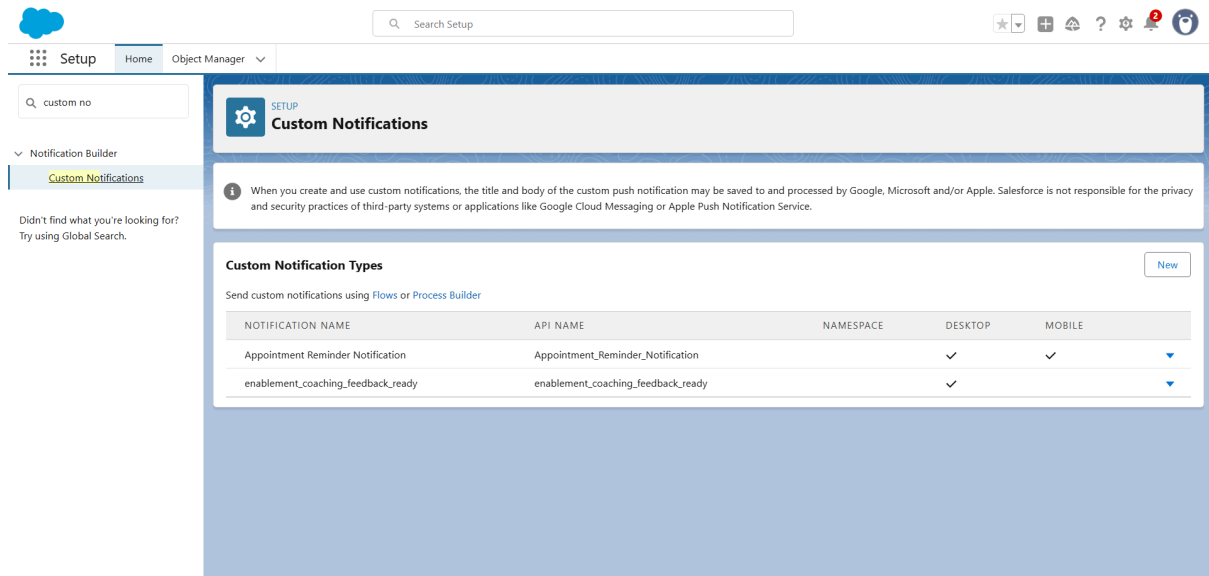
Create New View

New Task

Action	Subject +	Due Date	Priority	Status	Assigned To	Notify Assignee	Type
Edit Del	Follow-up with Patient after Appointment	Appointment: Appointment Date/Time + 2 days	Normal	Not Started	User : Dr. Arjun Kumar	<input type="checkbox"/>	Appointment

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.



The screenshot shows the Salesforce Setup interface for Custom Notifications. The left sidebar contains the Setup menu with 'Custom Notifications' highlighted under the 'Notification Builder' section. The main content area has a header 'Custom Notifications' and a warning message about third-party systems. Below this is a table titled 'Custom Notification Types' with columns for Notification Name, API Name, Namespace, Desktop, and Mobile. Two notification types are listed: 'Appointment Reminder Notification' and 'enablement_coaching_feedback_ready'.

Custom Notification Types

Send custom notifications using [Flows](#) or [Process Builder](#)

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
Appointment Reminder Notification	Appointment_Reminder_Notification		✓	✓
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	