

PHASE 4 – PROCESS AUTOMATION (ADMIN)

HealthCare360 – Salesforce Configuration Summary

1. VALIDATION RULES

- **Purpose:** Prevent incorrect or incomplete data entry during appointment creation.
- **Example Rule:**
 - **Object:** Appointment
 - **Rule Name:** Emergency Tag Required
 - **Formula:** ISBLANK (Tag__c)
 - **Error Message:** “Tag must be filled for emergency appointments.”
- **Impact:** Ensures data completeness before automation triggers.
- **Screenshot Tip:** Capture rule name, formula, and error message.

appointment Validation Rule

[Back to appointment](#)

Validation Rule Detail


EditClone

Rule Name	Prevent_Past_Appointment	Active	✓
Error Condition Formula	Appointment_date__c < TODAY()		
Error Message	Appointment date cannot be in the past.	Error Location	Top of Page
Description			
Created By	Palak Yadav, 9/23/2025, 6:17 AM	Modified By	Palak Yadav, 9/23/2025, 6:17 AM

EditClone

2. WORKFLOW RULES

- **Purpose:** Legacy automation for simple actions like task creation or field updates.
- **Rule Name:** Emergency Appointment Task
- **Object:** Appointment
- **Criteria:** Tag__c = Emergency
- **Action:** Create Task for Doctor
- **Status:** Deprecated (migrated to Flow Builder)
- **Screenshot Tip:** Show rule criteria and action summary.

 **Workflow Rules**

Workflow Rule

Emergency Appointment – Auto Task for Doctor

Help for this Page

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](#)

Workflow Rule Detail

Edit Clone Deactivate

Rule Name	Emergency Appointment – Auto Task for Doctor	Object	appointment
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	appointment: Tag EQUALS Emergency		
Created By	Palak Yadav, 9/24/2025, 11:48 AM	Modified By	Palak Yadav, 9/24/2025, 12:14 PM

Workflow Actions

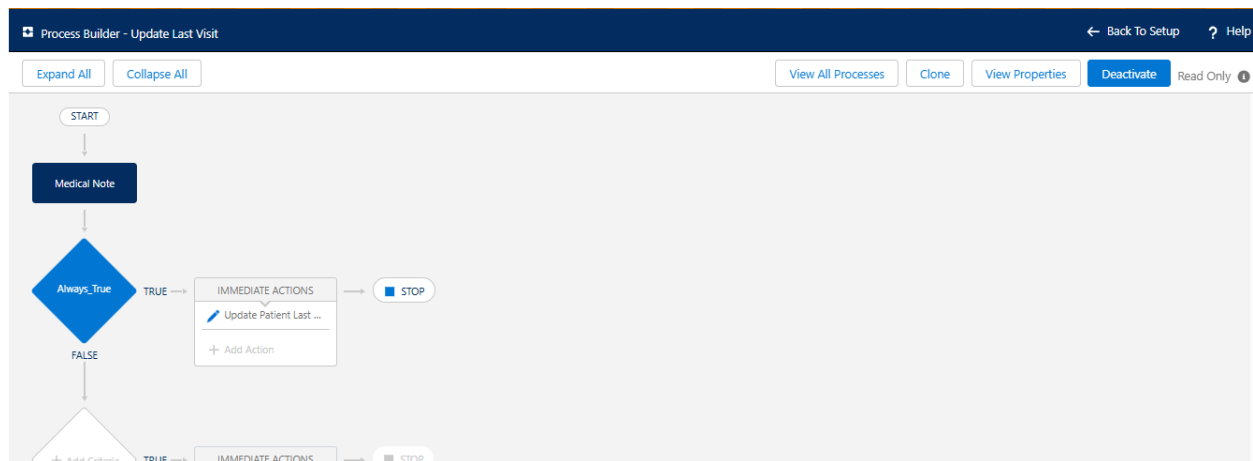
Edit

Immediate Workflow Actions

Type	Description
Task	Review Emergency Appointment

3. PROCESS BUILDER

- **Purpose:** Visual automation for multi-step logic (now replaced by Flow Builder).
- **Process Name:** Emergency Routing
- **Trigger:** Appointment record creation
- **Criteria:** Tag__c = Emergency
- **Actions:**
 - Field Update: Status__c = Pending Review
 - Email Alert to Doctor
- **Status:** Archived
- **Screenshot Tip:** Capture process diagram and action details.



4. APPROVAL PROCESS

- **Purpose:** Route emergency appointments for doctor review and approval.
- **Process Name:** Emergency Appointment Approval
- **Object:** Appointment
- **Entry Criteria:** Tag__c = Emergency
- **Approver:** \$Record.Doctor_User__c
- **Actions:**
 - Initial: Email Alert, Field Update (Approval_Status__c = Submitted)
 - Final Approval: Field Update (Approval_Status__c = Approved)
 - Final Rejection: Field Update (Approval_Status__c = Rejected), Email Alert
- **Status:** Active
- **Screenshot Tip:** Show entry criteria, approver, and action steps.

Approval Processes

appointment: Emergency_Approval

« Back to Approval Process List

Process Definition Detail

Edit Clone Delete

Process Name	Emergency_Approval	Active	<input type="checkbox"/> ⓘ
Unique Name	Emergency_Approval	Next Automated Approver Determined By	
Description			
Entry Criteria	Type__c = 'Emergency'		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template	Emergency Appointment Submitted		
Initial Submitters	User: Palak Yadav, appointment Owner		
Created By	Palak Yadav, 9/23/2025, 11:13 AM	Modified By	Palak Yadav, 9/24/2025, 10:00 AM

Initial Submission Actions ⓘ

Add Existing Add New

Action	Type	Description
	Record Lock	Lock the record from being edited
Edit Remove	Email Alert	Notify Doctor for Emergency Approval

5. FLOW BUILDER

? a. Screen Flow

- **Purpose:** Manual interface for receptionist to submit emergency appointments.
- **Usage:** Select doctor, submit for approval
- **Status:** Optional
- **Screenshot Tip:** Show screen layout and input fields.

? b. Record-Triggered Flow

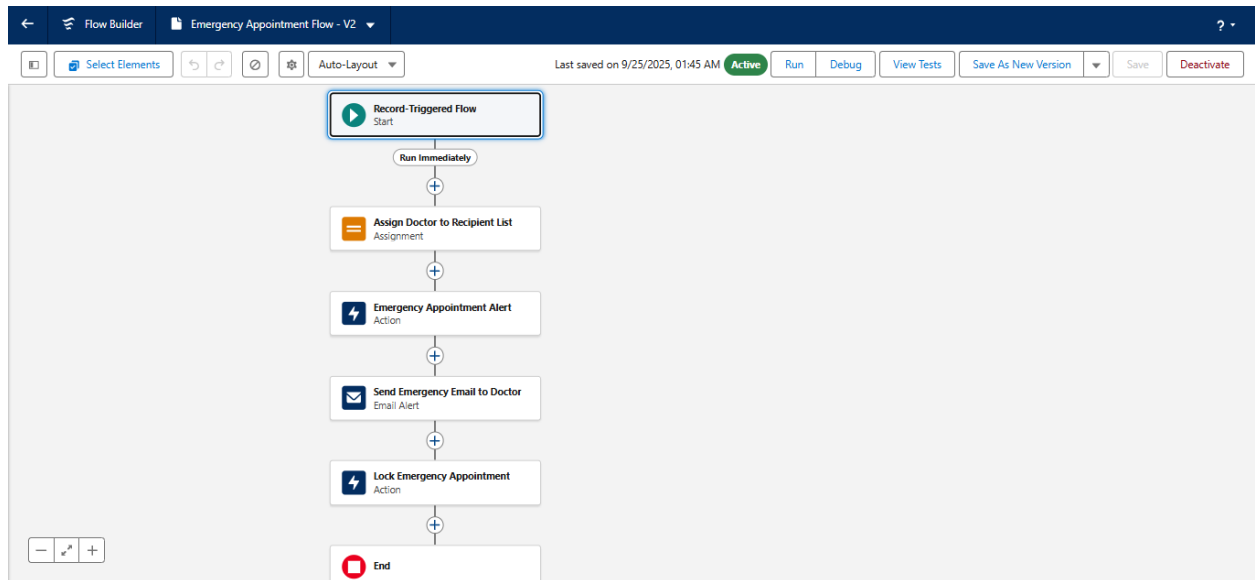
- **Purpose:** Main automation engine for emergency logic.
- **Trigger:** Appointment record created or updated
- **Condition:** `Tag__c = Emergency`
- **Actions:**
 - Assignment: `DoctorRecipientId`
 - Custom Notification
 - Email Alert
 - Task Creation
 - Logging
 - Lock Record
- **Status:** Active
- **Screenshot Tip:** Capture full flow canvas and each element's config.

? c. Scheduled Flow

- **Purpose:** Daily check for pending emergency approvals.
- **Trigger:** Every 24 hours
- **Condition:** `Approval_Status__c = Submitted`
- **Action:** Reminder email to doctor
- **Status:** Planned
- **Screenshot Tip:** Show schedule settings and condition logic.

? d. Auto-Launched Flow

- **Purpose:** Called from other flows or Apex for emergency escalation.
- **Status:** Not yet implemented
- **Screenshot Tip:** Show placeholder or flow setup if created.



6. EMAIL ALERTS

- **Purpose:** Notify doctor via email for emergency cases.
- **Template:** Emergency Appointment Alert
- **Recipient:** `$Record.Doctor_User__c`
- **Trigger:** Flow or Approval Process
- **Status:** Active
- **Screenshot Tip:** Capture email alert setup and template preview.

SETUP Email Alerts

Email Alert

Notify Doctor for Emergency Approval

[Rules Using This Email Alert \[0\]](#) | [Approval Processes Using This Email Alert \[0\]](#) | [Entitlement Processes Using This Email Alert \[0\]](#)

Email Alert Detail [Edit](#) [Delete](#) [Clone](#)

Description	Notify Doctor for Emergency Approval	Email Template	Emergency Approval Alert
Unique Name	Notify_Doctor_for_Emergency_Approval	Object	appointment
From Email Address	Current User's email address		
Recipients	Related User: Doctor User		
Additional Emails			
Created By	Palak Yadav, 9/24/2025, 7:58 AM	Modified By	Palak Yadav, 9/24/2025, 8:17 AM

[Edit](#) [Delete](#) [Clone](#)

7. FIELD UPDATES

- **Purpose:** Update appointment status during automation.
- **Fields Updated:**
 - `Approval_Status__c` = Submitted / Approved / Rejected
 - `Status__c` = Locked
- **Trigger:** Flow and Approval Process
- **Status:** Active
- **Screenshot Tip:** Show field update configuration and values.

The screenshot shows the Salesforce 'Field Updates' setup page. At the top, there's a 'SETUP' header with a gear icon and the text 'Field Updates'. Below this, the page title is 'Field Update Mark Emergency as Submitted'. To the right of the title are links for 'Rules Using This Field Update', 'Approval Processes Using This Field Update', and 'Entitlement Processes Using This Field Update', each followed by a count in parentheses. A 'Help' icon is also present. The main section is 'Field Update Detail', which contains a table with the following fields: Name (Mark Emergency as Submitted), Unique Name (Mark_Emergency_as_Submitted), Description, Object (appointment), Field to Update (appointment: Approval_Status__c), Field Data Type (Picklist), Re-evaluate Workflow Rules after Field Change (unchecked checkbox), and New Field Value (Submitted). There are 'Edit' and 'Delete' buttons for both the top and bottom sections of the detail table. Below the detail section is a 'Rules Using This Field Update' section, which currently shows a message: 'This field update is currently not used by any rules'.

Field Update Detail	
Name	Mark Emergency as Submitted
Unique Name	Mark_Emergency_as_Submitted
Description	
Object	appointment
Field to Update	appointment: Approval_Status__c
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	<input type="checkbox"/>
New Field Value	Submitted

Rules Using This Field Update	
This field update is currently not used by any rules	

8. TASKS

- **Purpose:** Assign follow-up responsibility to doctor.
- **Action Type:** Create Task
- **Assigned To:** `$Record.Doctor_User__c`
- **Subject:** Review Emergency Appointment
- **Due Date:** Today + 1
- **Status:** Not Started
- **Priority:** High
- **Status:** Active
- **Screenshot Tip:** Capture task creation element in Flow.

SETUP

Tasks

Task

Review Emergency Appointment

[Rules Using This Task \(1\)](#) |
 [Approval Processes Using This Task \(0\)](#) |
 [Entitlement Processes Using This Task \(0\)](#)

[Help for this Page](#)

Workflow Task Detail

Edit

Delete

Clone

Object	appointment	Status	Not Started
Assigned To	User : Palak Yadav	Priority	High
Subject	Review Emergency Appointment		
Unique Name	Review_Emergency_Appointment		
Due Date	Current User: Created Date + 1 days		
Comments			
Created By	Palak Yadav, 9/24/2025, 12:04 PM	Modified By	Palak Yadav, 9/24/2025, 12:04 PM

Edit

Delete

Clone

Rules Using This Task

[Rules Using This Task Help](#)

Action	Rule Name	Description	Object	Active
Edit Del Deactivate	Emergency Appointment – Auto Task for Doctor		appointment	✓

9. CUSTOM NOTIFICATIONS

- **Purpose:** Real-time alert via Salesforce bell, desktop, or mobile.
- **Notification Type:** Emergency Appointment Alert
- **Recipient IDs:** DoctorRecipientId
- **Title:** New Emergency Appointment
- **Body:** Please review the emergency case ASAP
- **Target ID:** \$Record.Id
- **Status:** Active
- **Screenshot Tip:** Show notification type setup and Flow action config.

SETUP

Custom Notification

When you create and privacy and security pr

Custom Notification

Send custom notifications u

NOTIFICATION NAME

Emergency Appointment

enablement_coaching_f

✕

Edit Custom Notification Type

* Custom Notification Name

Emergency Appointment Alert

* API Name

Emergency_Appointment_Alert

Supported Channels

☒ Desktop

☒ Mobile

Cancel

Save

google, Microsoft and/or Apple. Salesforce is not responsible for the

New

FACE	DESKTOP	MOBILE
	✓	✓
	✓	▼

