

# Lab Case Study – Implementing Workflow using the Force.com PaaS

Hospital “SouthWest” intends to implement an automated patient appointment notification system. The system should have a patient object comprising the following fields for each of the patient record:

- (a) Patient’s Name (Text)
- (b) Patient Illness Record (Text - Long)
- (c) Patient Email Address (Email)
- (d) Doctor’s Name (Text)
- (e) Doctor’s Email Address (Email)
- (f) Next Appointment Date (Date)
- (g) Time of next appointment (Time)
- (h) Patient Notified (Pick List, having the following two values: Yes and No). Default value for this field is No.

The system should automatically check the *Patient Notified* status in the patient record, and if the corresponding value is **No**, then it should automatically send an email to the patient reminding them of the appointment date and time. The reminder email should be sent to the patient’s email address, and should contain the *date of next appointment*, *time of next appointment*, and the *doctor with whom the appointment* is scheduled for.

When the appointment email is sent out, the *Patient Notified* status in the patient record should be set to “Yes” automatically.

## **Activities to be conducted during this lab:**

- (1) Create a patient object with the above data fields;
- (2) Create a patient appointment notification system, and provide it with access to the patient object and patient tab;
- (3) Create three instances (or records) of the patient object;
- (4) Workflow to automatically evaluate if the patient has been notified of the appointment date and time, and send an email to the patient and the doctor. Subsequently the *Patient Notified* status should be changed to Yes, automatically.
  - a. Create a workflow rule to evaluate the current value of the field *Patient Notified*.
  - b. Create an email template that would be used for sending reminder emails to the patients.

- c. Create a corresponding workflow action (to the rule specified in (a) above), that will send email (using the template specified in (b) above), to the patient and to the doctor with the required details.
- d. Create another corresponding workflow action (to the rule specified in (a) above), to automatically update the field value of the field *Patient Notified*.