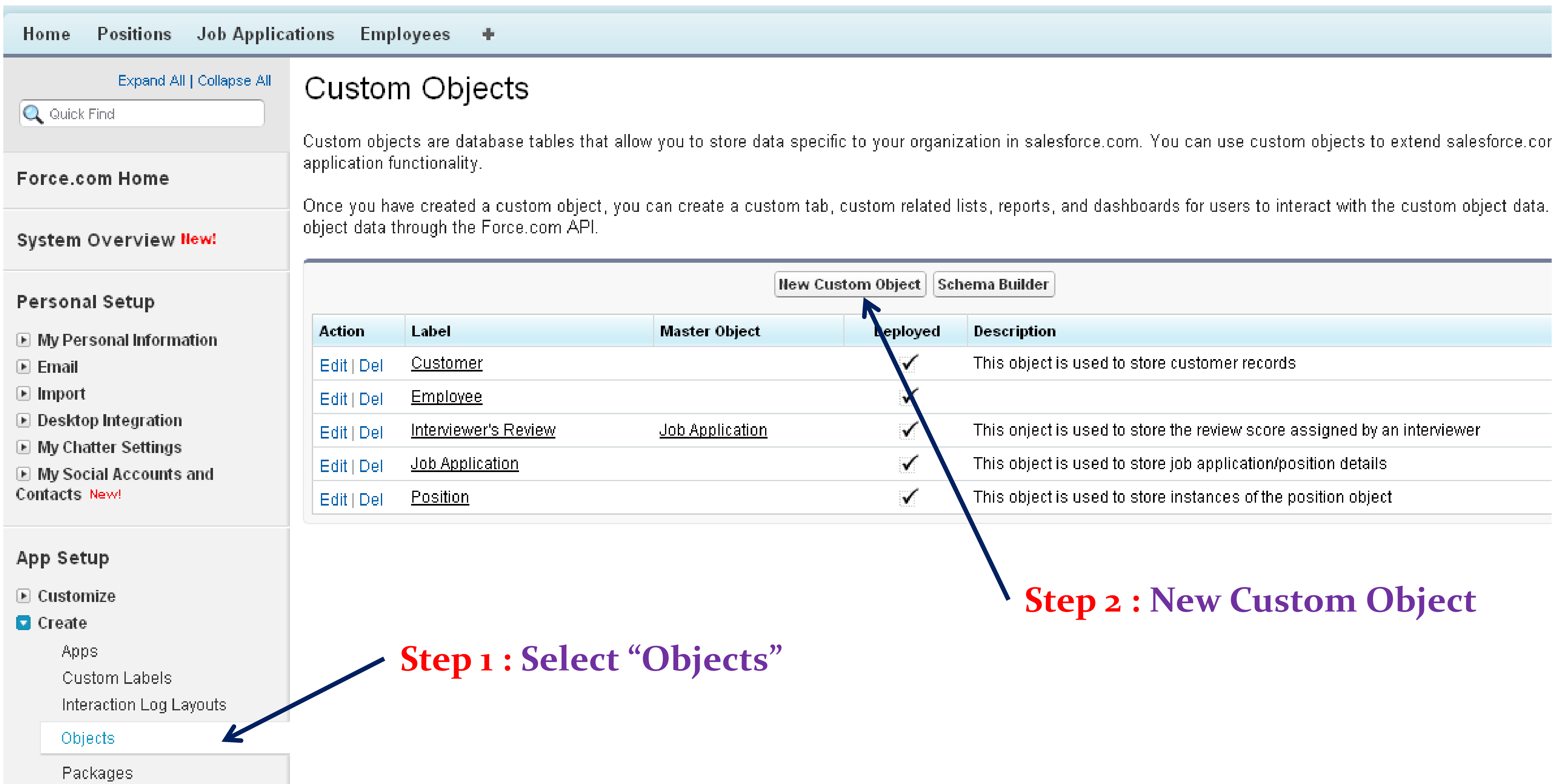
Week 09
Tutorial on Defining and Executing Workflows on the Force platform

Solution for the Simple Automatic Patient Appointment Reminder Application

SCHOOL OF SOFTWARE

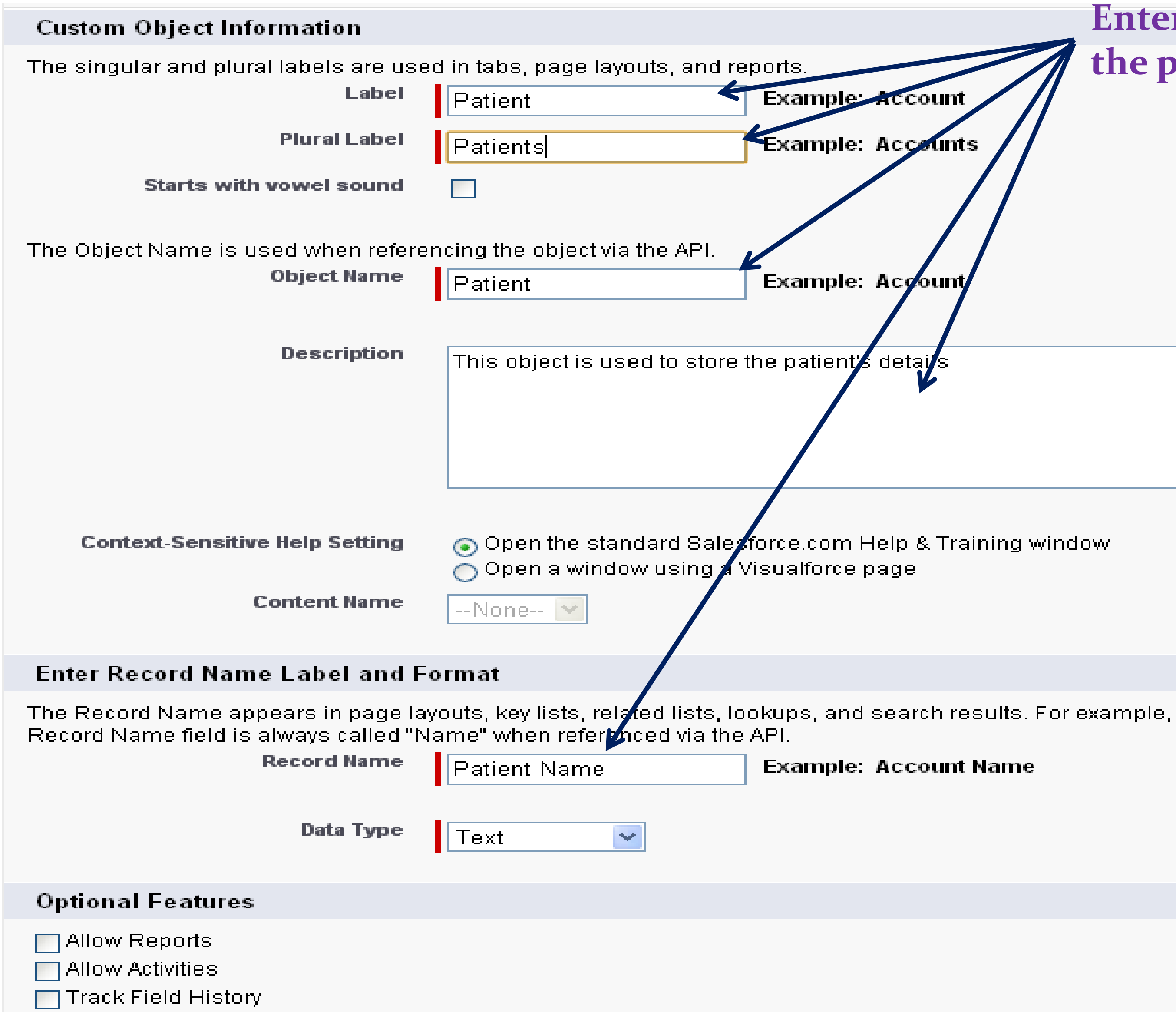
(1) Create a new patient object

- To create a new patient object go to
- Your Name→ Application Set up→ Create → Objects



Create a new patient object

- Enter the details of the patient object and save it.



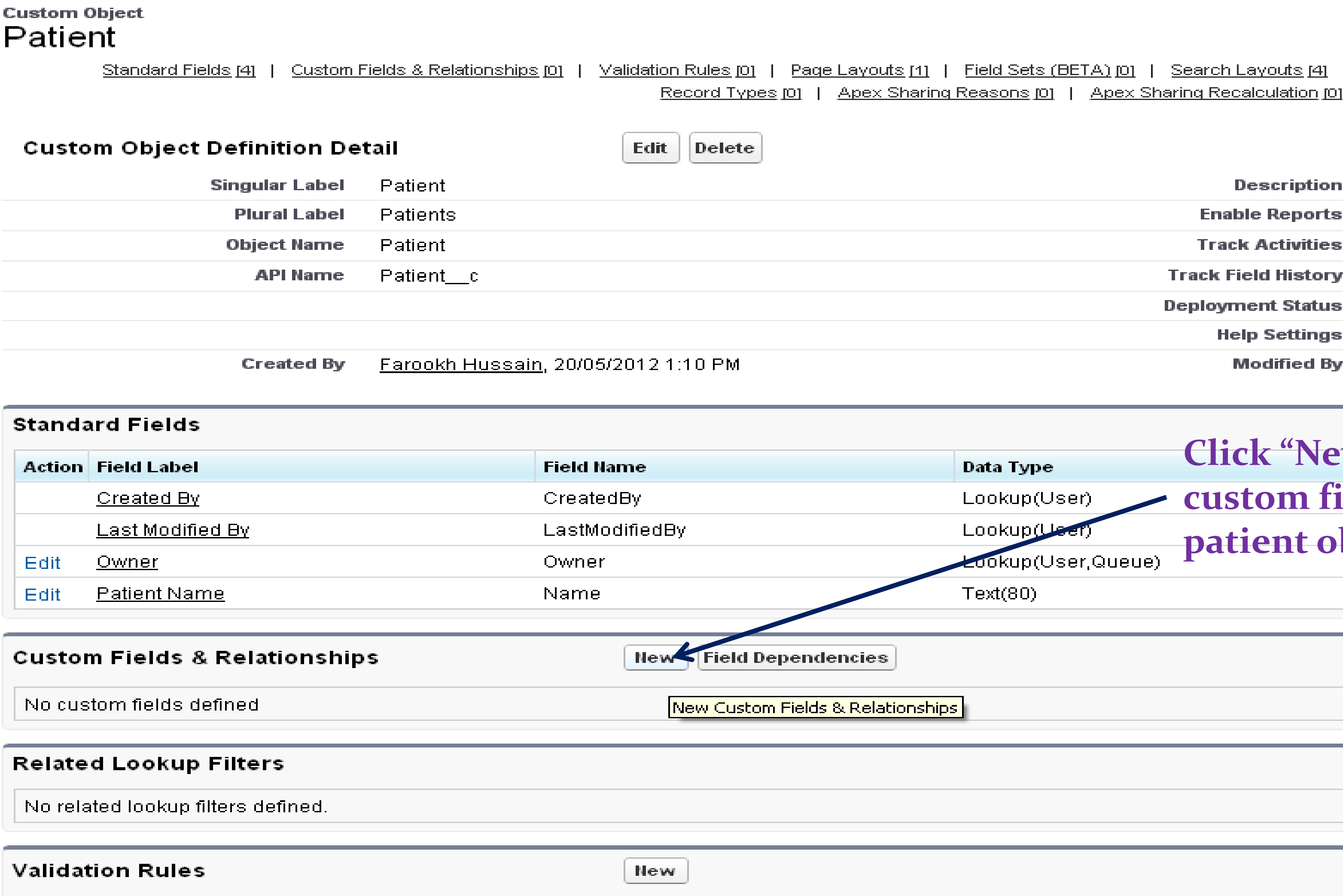
Enter the details of the patient object

Create a new patient object

Enter the details of the patient object

Click “Save” to save the patient object

Create a custom fields in the patient object



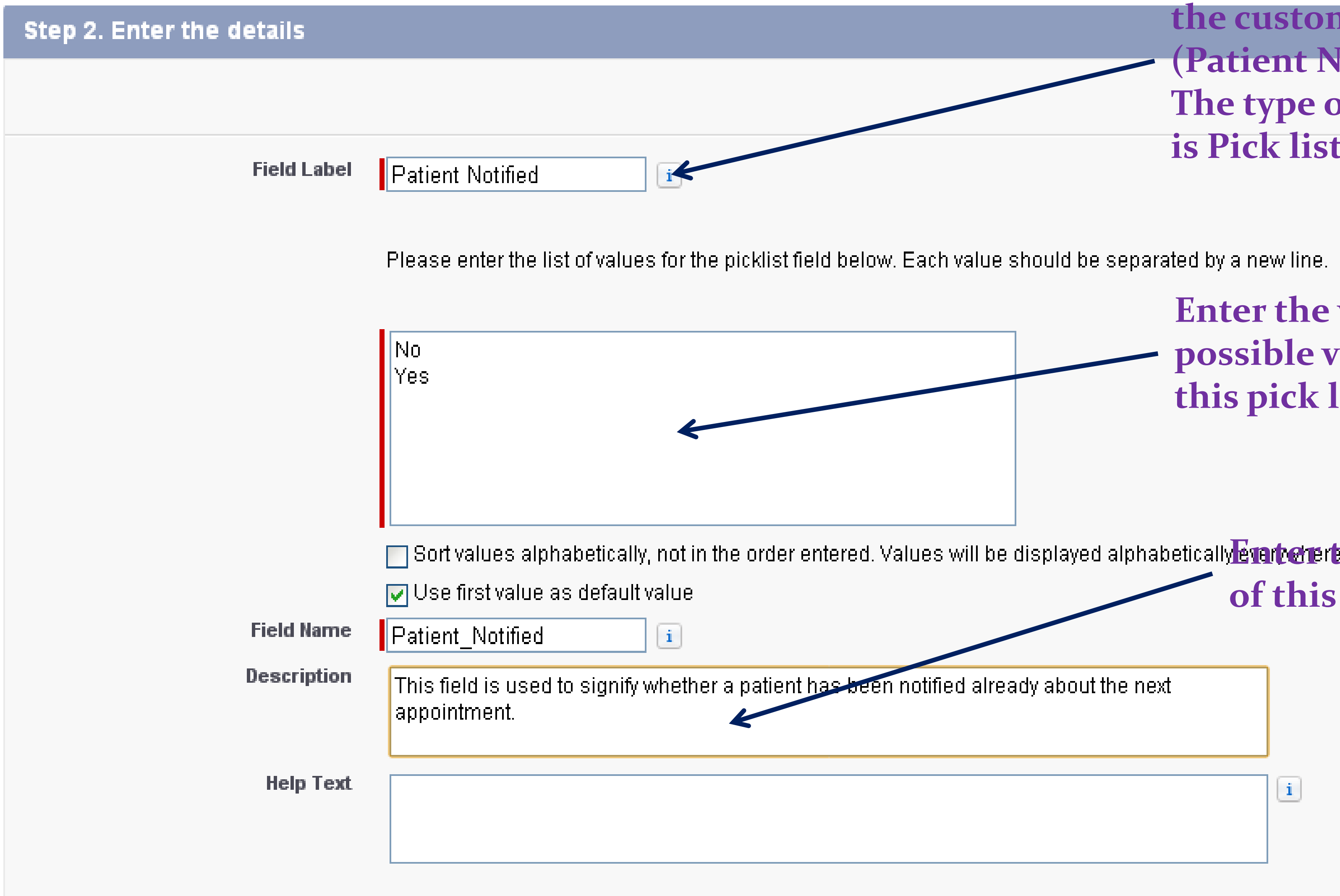
Click "New" to define custom fields in the patient object

Defining the custom fields in the patient object

- Create the following custom fields in the patient object:
  - Patient’s Name(Text)
  - Patient Illness Record (Text - Long)
  - Patient Email Address (Email)
  - Doctor’s Name (Text)
  - Doctor’s Email Address (Email)
  - Next Appointment Date and Time (Date/Time)
  - Patient Notified? (Pick List of the following two values: Yes and No). Default value for this field is No.

Example of creating custom field in the patient object – Patient Notified?

Enter the name of the custom field (Patient Notified). The type of this field is Pick list.



Enter the various possible values for this pick list field

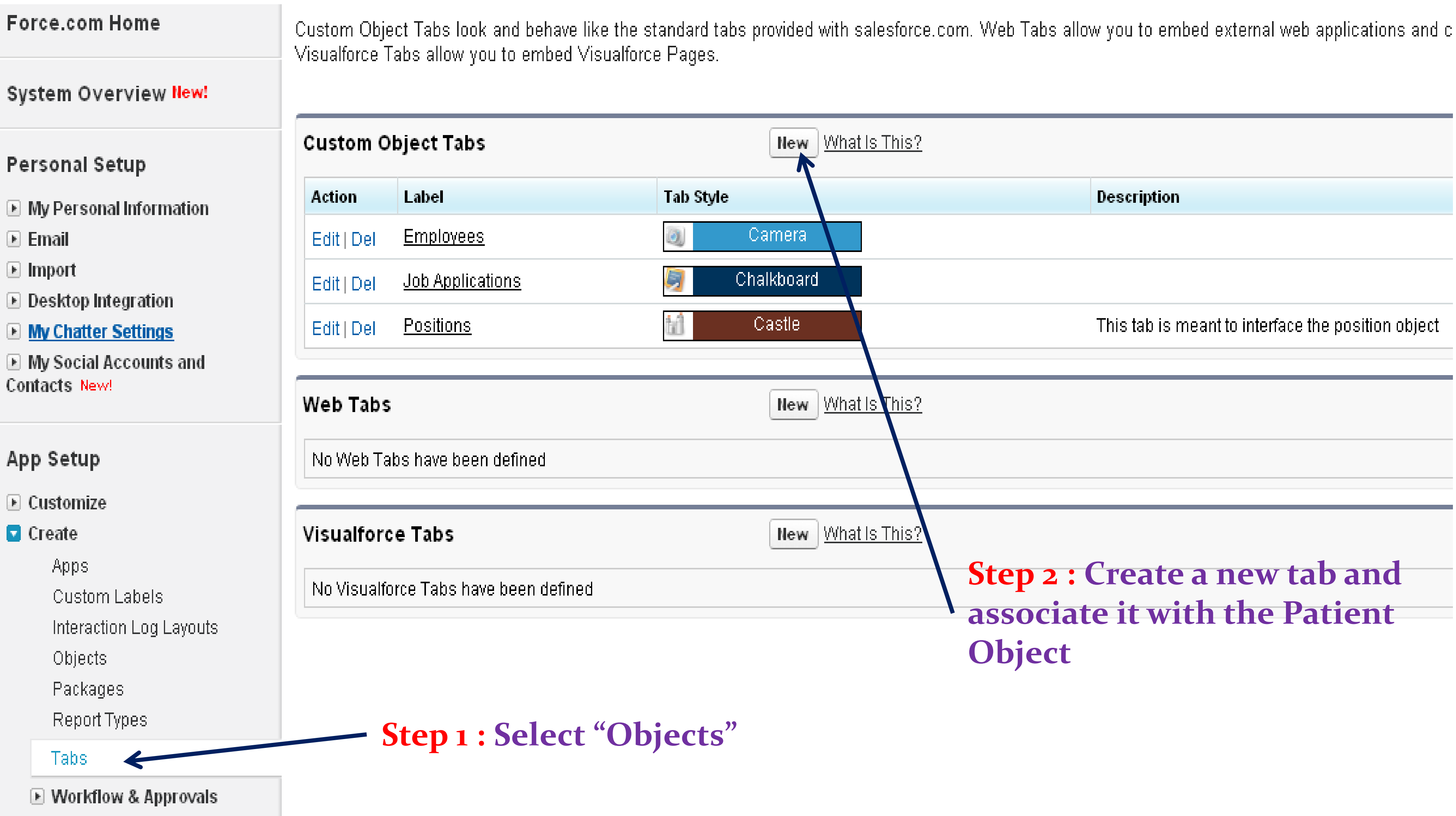
Enter the description of this field

Patient Object after defining the required custom fields

Custom Fields & Relationships New | Field Dependencies

Action	Field Label	API Name	Data Type	Controlling
Edit | Del	Doctor's Email Address	Doctor_s_Email_Address__c	Email	
Edit | Del	Doctor's Name	Doctor_s_Name__c	Text(70)	
Edit | Del	Email Address	Email_Address__c	Email	
Edit | Del	First Name	First_Name__c	Text(60)	
Edit | Del	Illness Record	Illness_Record__c	Rich Text Area(32768)	
Edit | Del	Last Name	Last_Name__c	Text(70)	
Edit | Del	Next Appointment Data and Time	Next_Appointment_Data_and_Time__c	Date/Time	
Edit | Del | Replace	Patient Notified	Patient_Notified__c	Picklist	

Define a new tab for the patient object

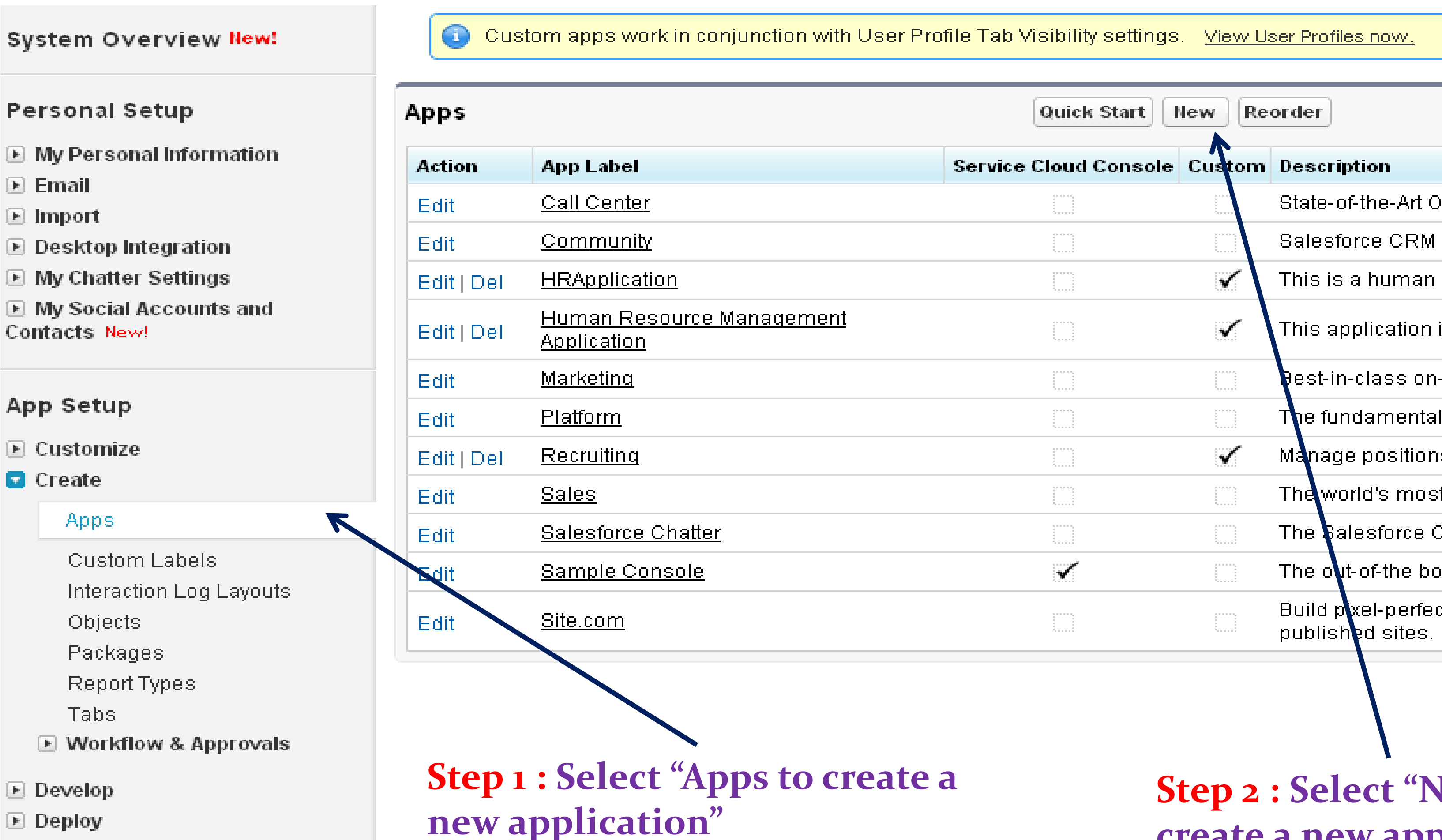


Step 2 : Create a new tab and associate it with the Patient Object

Step 1 : Select “Objects”

(2) Create a patient management application, and provide it with access to the patient object

- To create a new patient object go to
- Your Name→ Application Set up→ Create → Apps

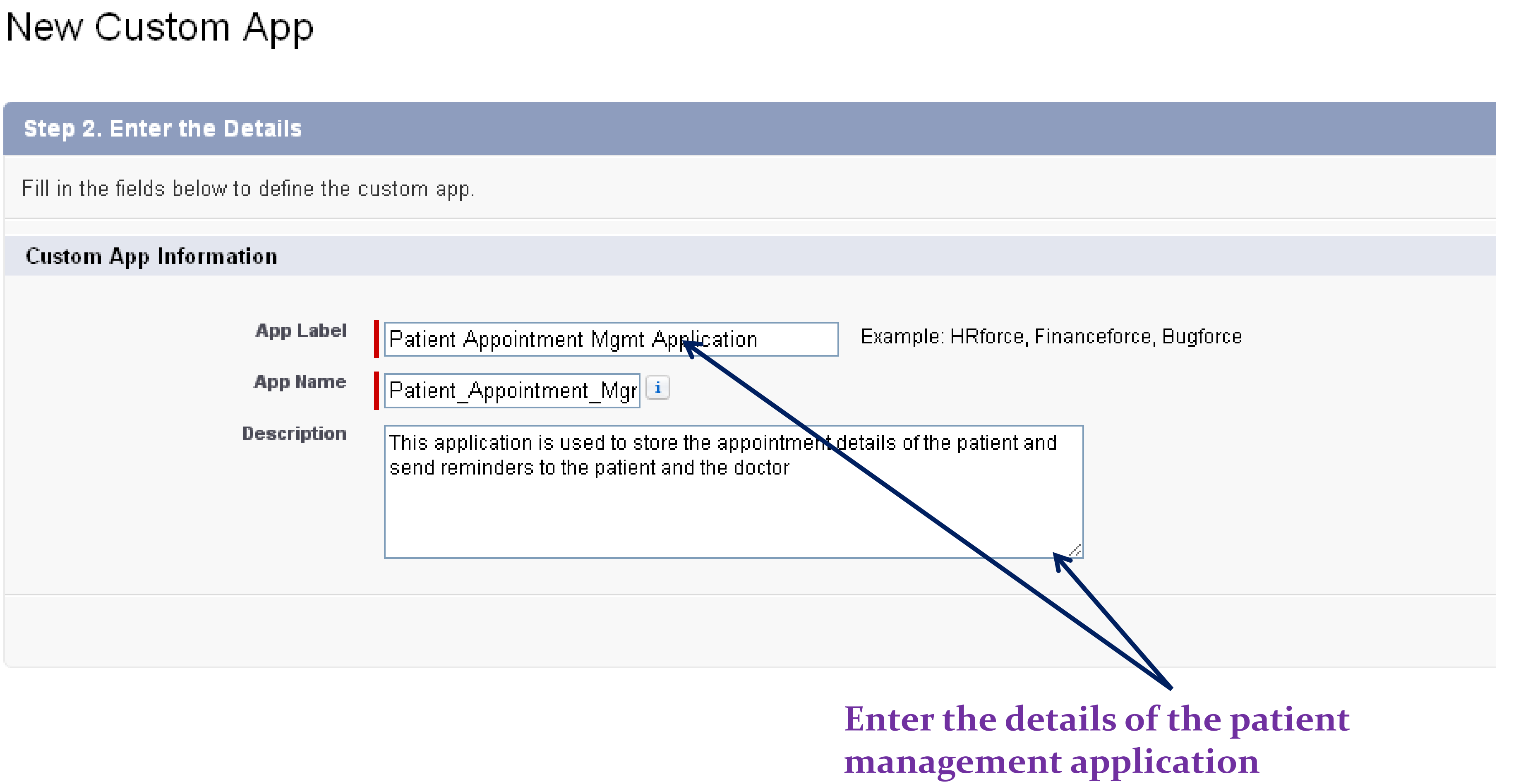


Step 1 : Select "Apps to create a new application"

Step 2 : Select "New" to create a new application

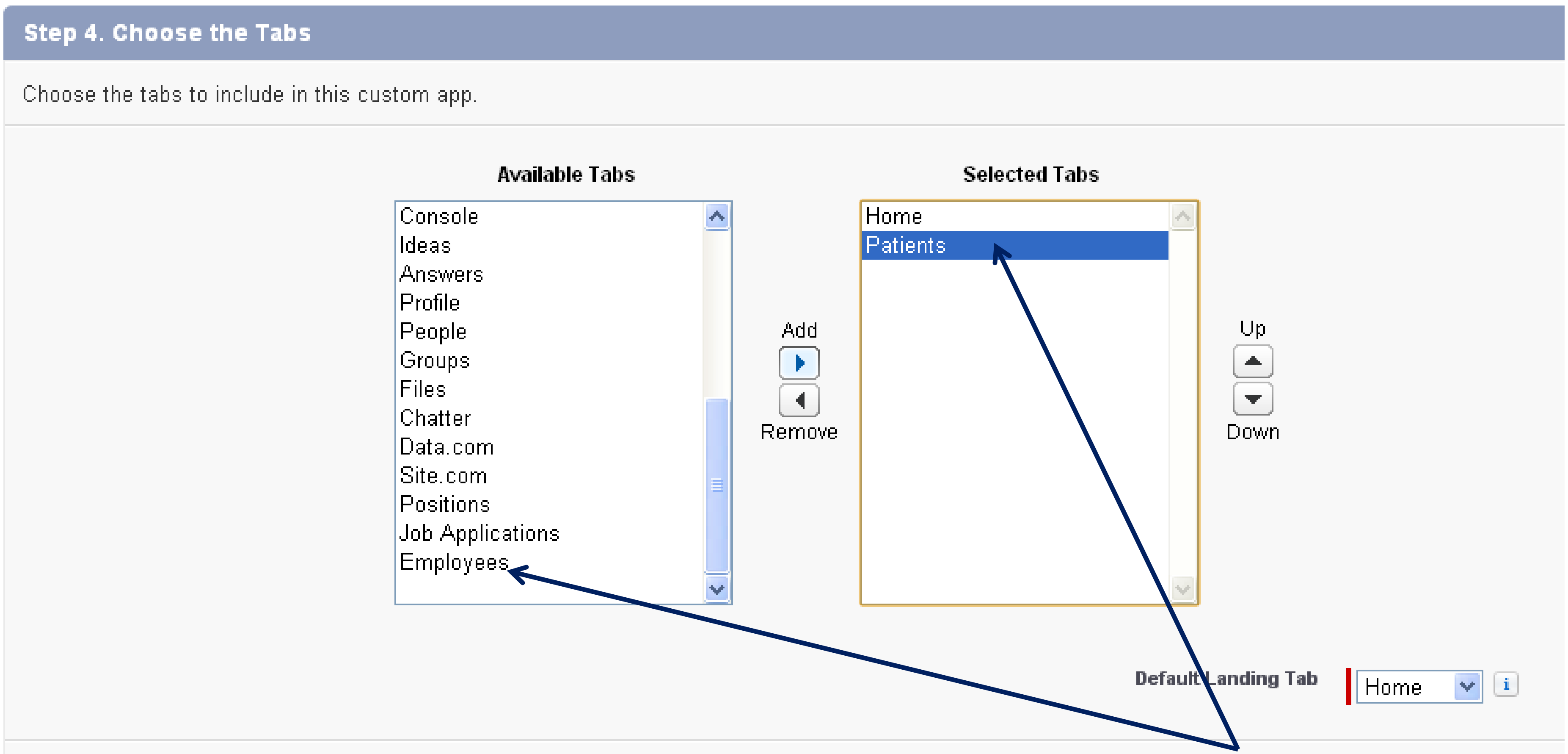
Enter the details for the application

- Enter the details of the new patient appointment management applications



Adding tabs to the patient application

- Provide the new application with access to the patient tab

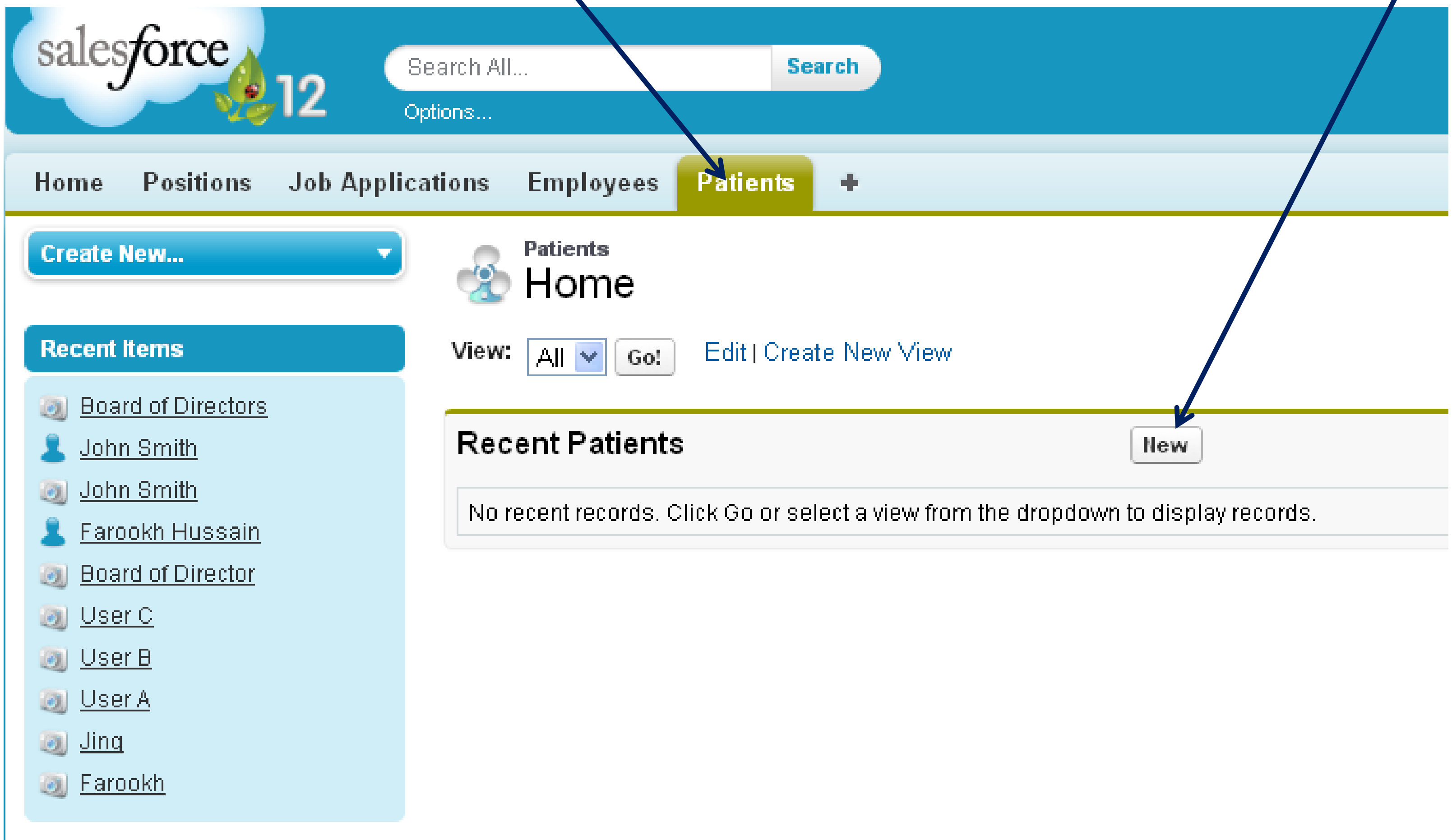


Select the tabs to be included in this application

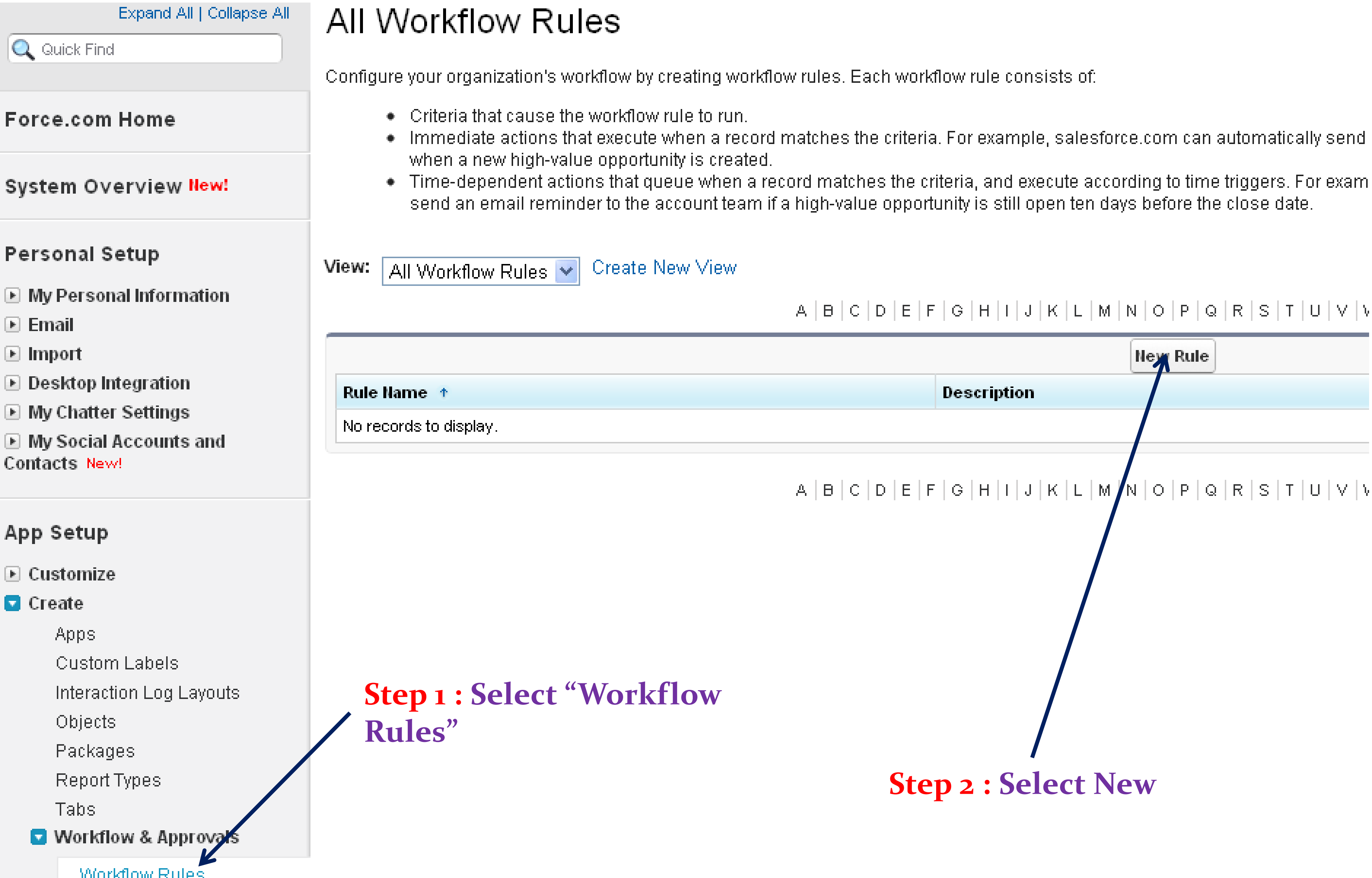
(3) Create three instances (or records) of the patient object

Step 1 : Select "Patient Tab"

Step 2 : Select "New" to create a new patient record



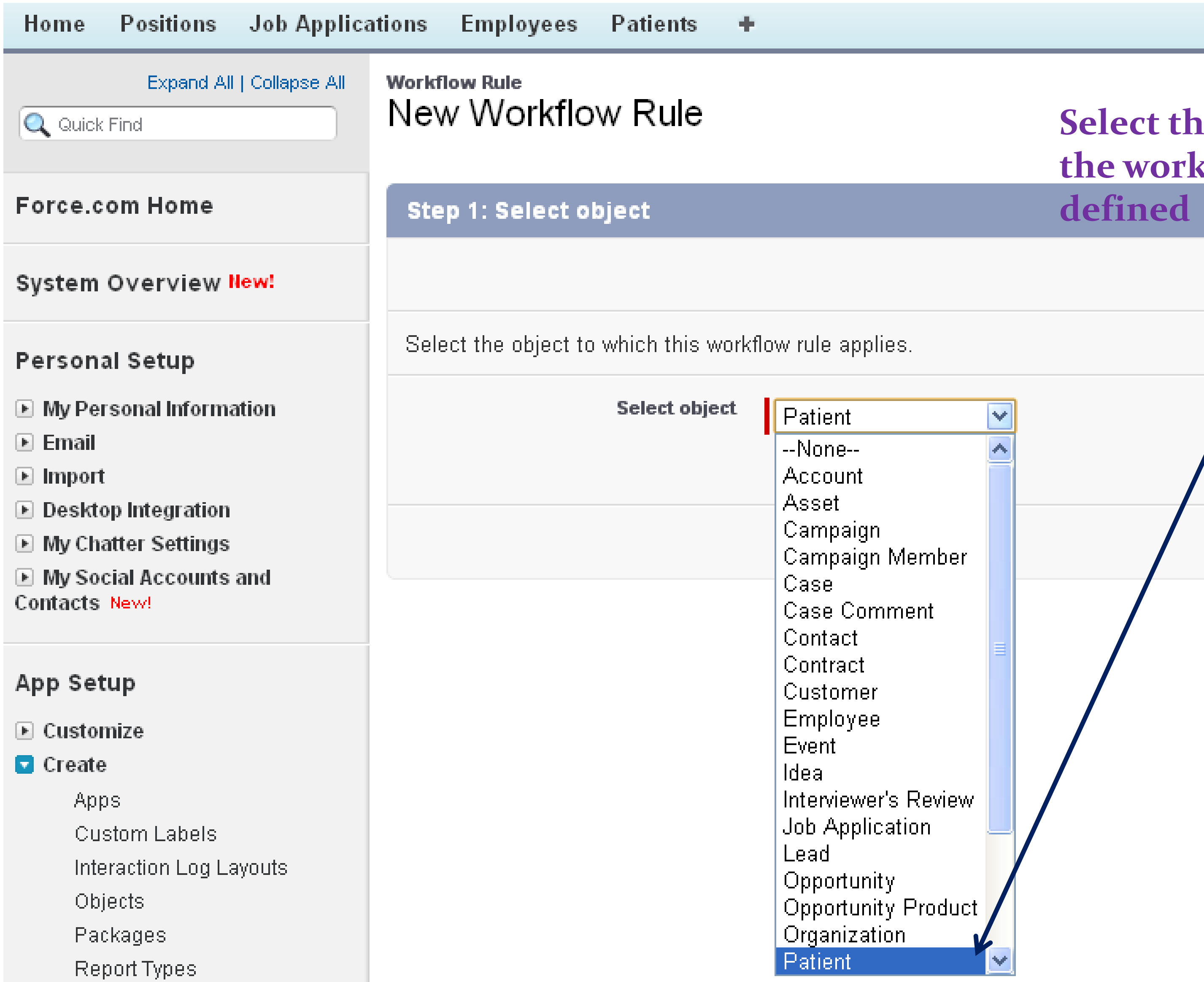
4(a) Create a workflow rule to evaluate the current value of the object field *Patient Notified?*



Step 1 : Select "Workflow Rules"

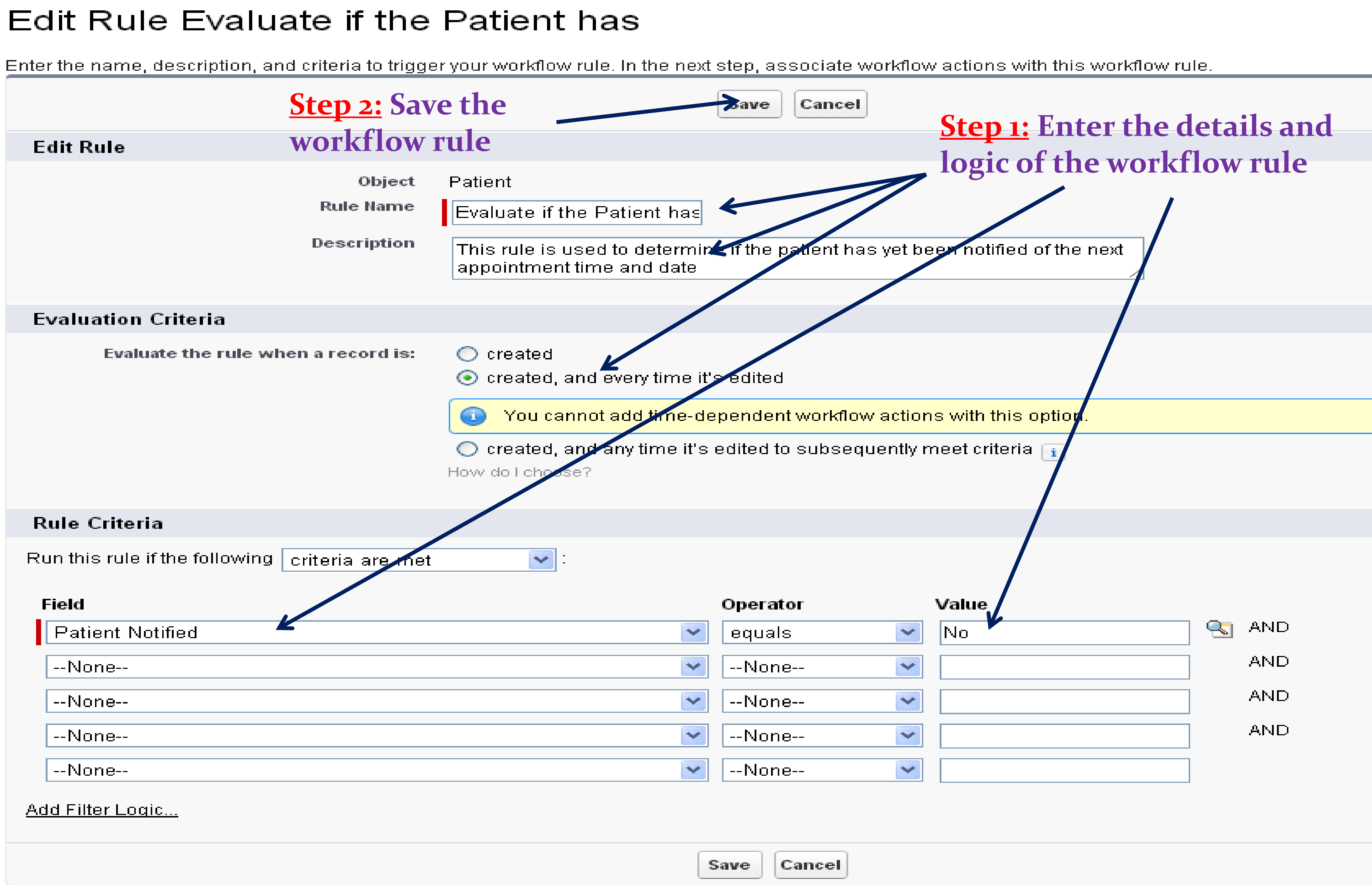
Step 2 : Select New

4(a) Create a workflow rule to evaluate the current value of the object field *Patient Notified?*



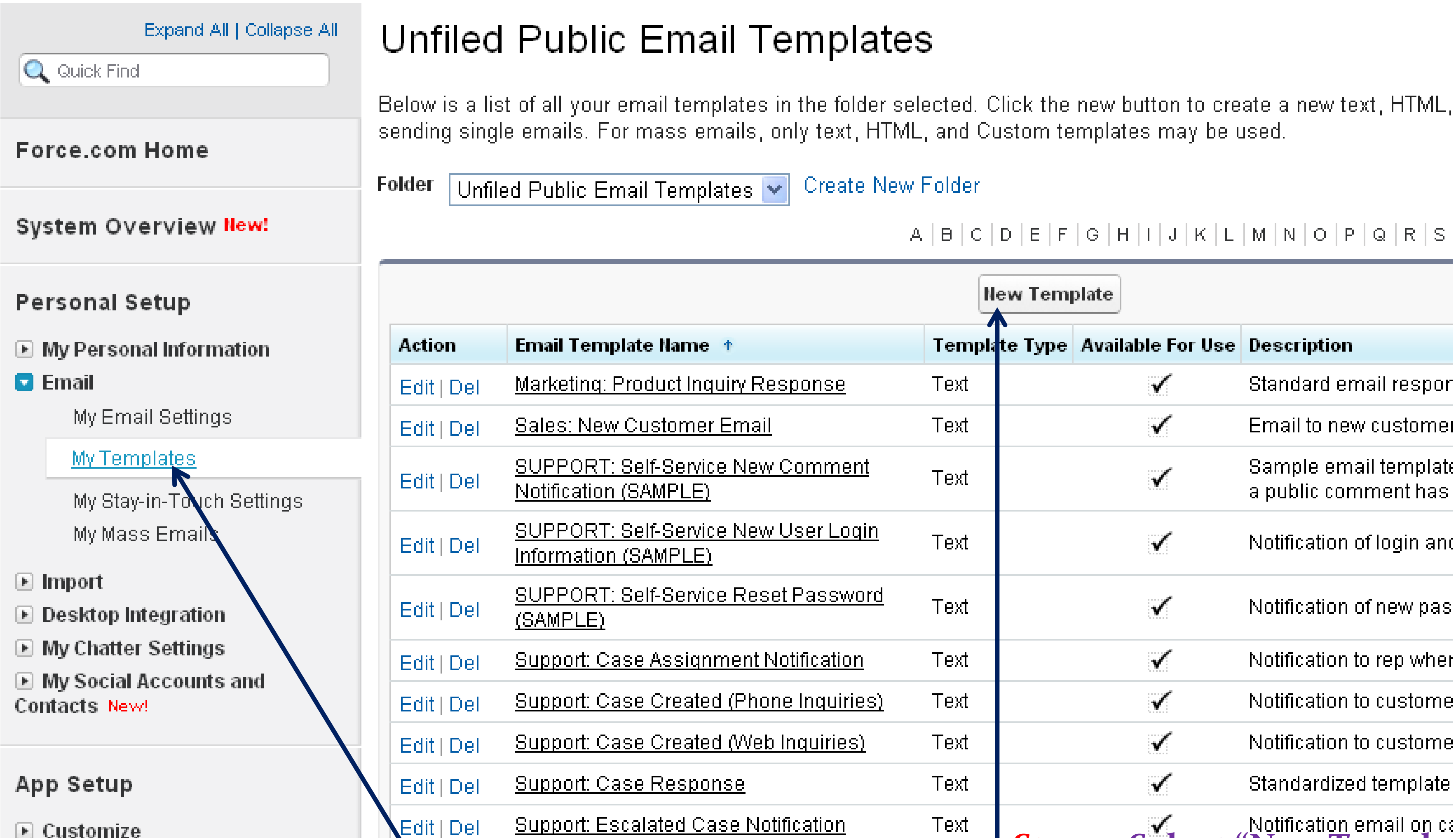
Select the object on which the workflow rule is to be defined

4(a) Create a workflow rule to evaluate the current value of the object field *Patient Notified?*



4(b) Create an email template for sending reminder emails to the patients

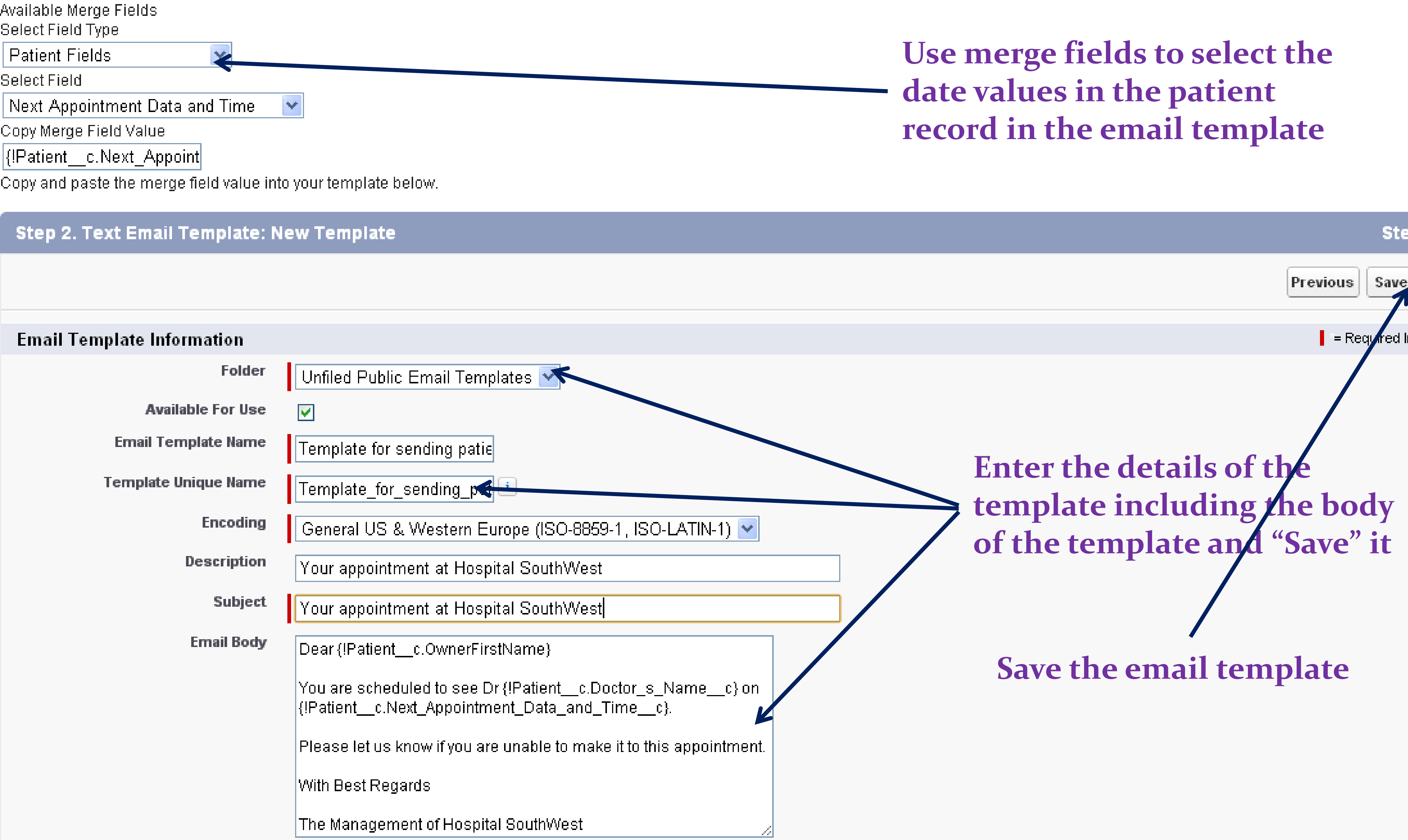
Go to your Profile Name on Top right hand side of the page → My Settings →Email → Email Templates



Step 1: Select "My Templates"

Step 2: Select "New Template"

4(b) Create an email template for sending reminder emails to the patients



Use merge fields to select the date values in the patient record in the email template

Enter the details of the template including the body of the template and "Save" it

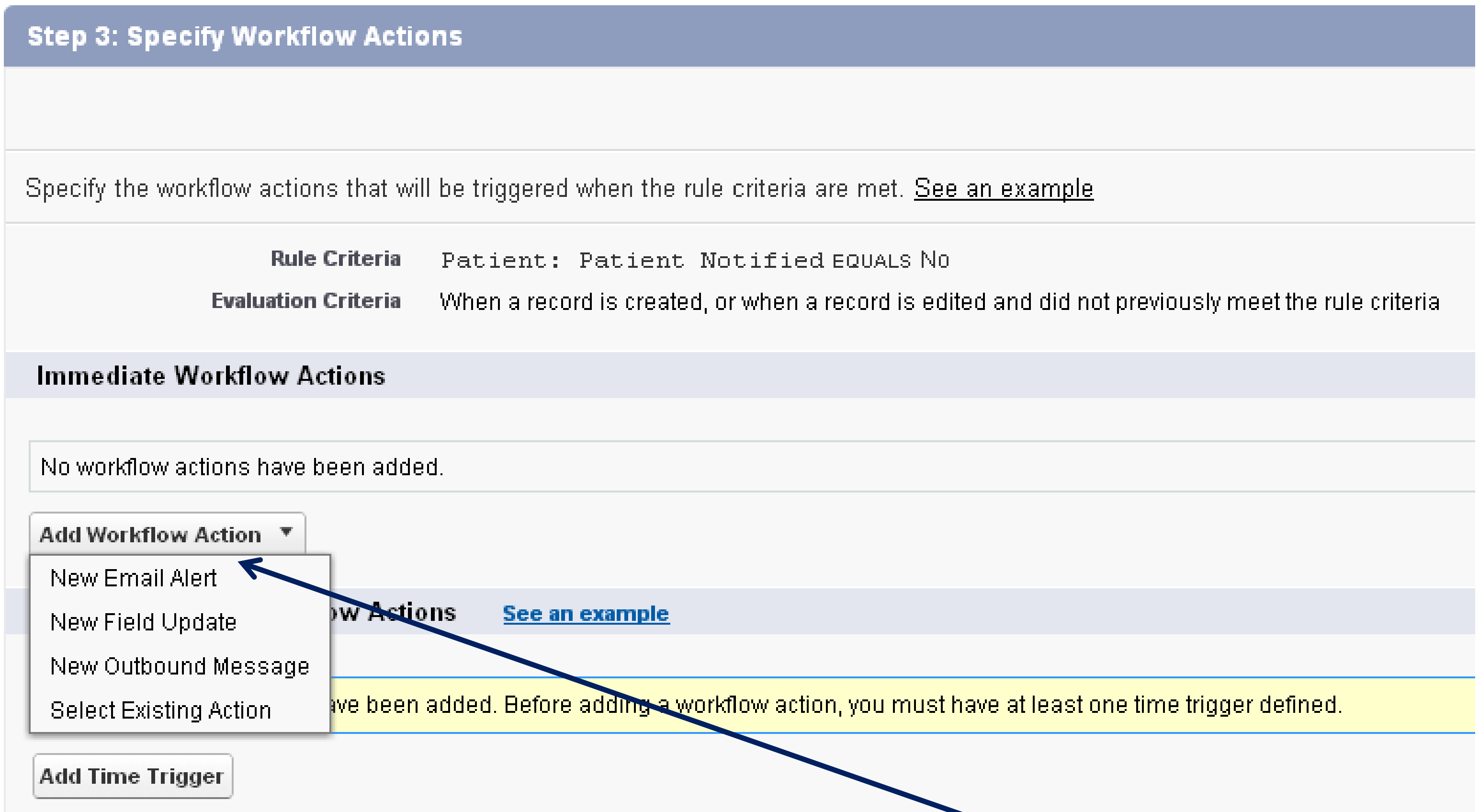
Save the email template

4(c) Create a workflow action to send appointment reminder to patients automatically

- Go to Build→ Create → Workflow & Approvals → Workflow Rules
- Select the workflow rule that you created for evaluating the “Patient Notified” object field
- Select “Immediate Workflow Action”

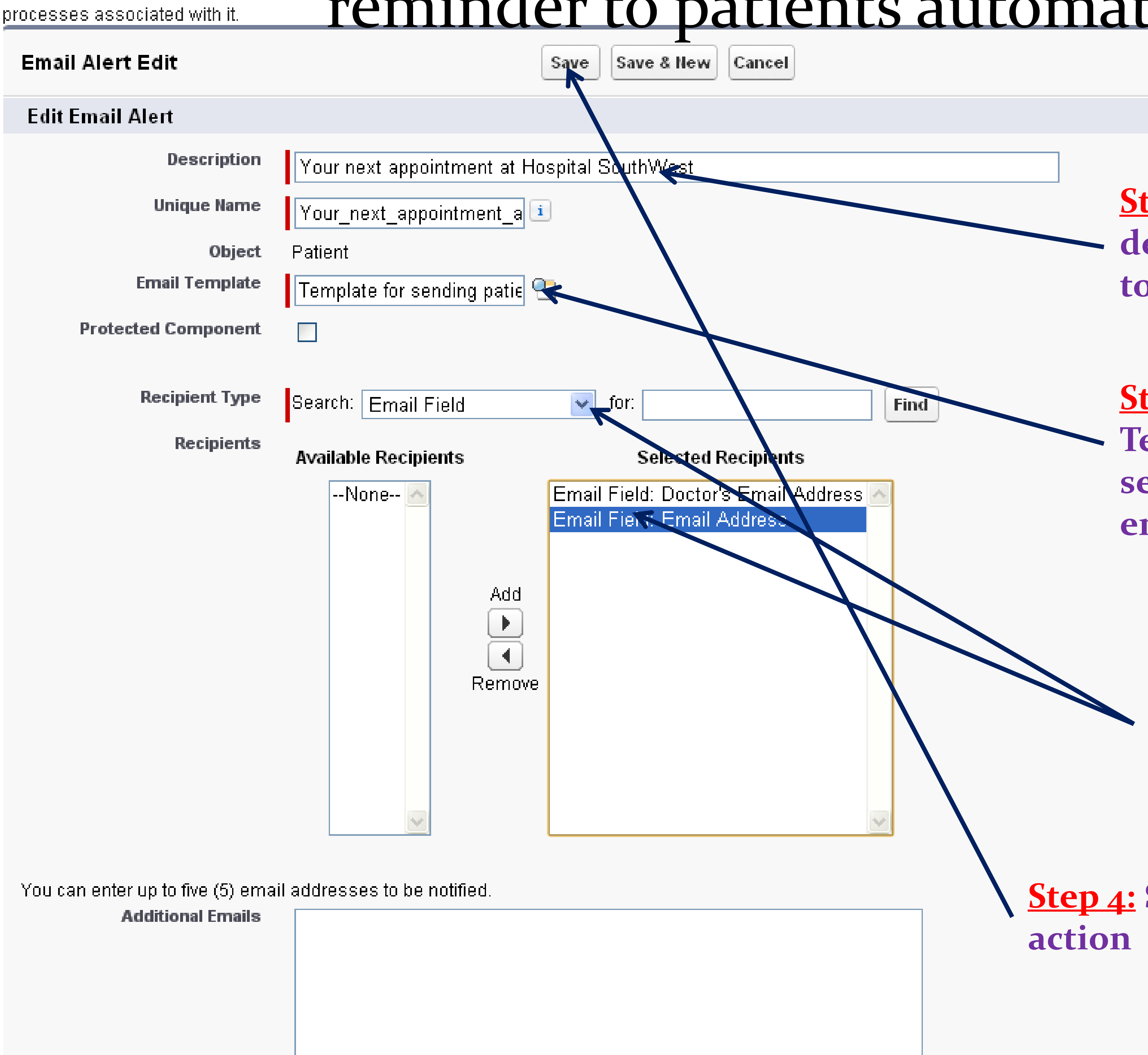
4(c) Create a workflow action to send appointment reminder to patients automatically

Edit Rule Evaluate if the patient has been notified



Select "New Email Alert" as Workflow Action

4(c) Create a workflow action to send appointment reminder to patients automatically



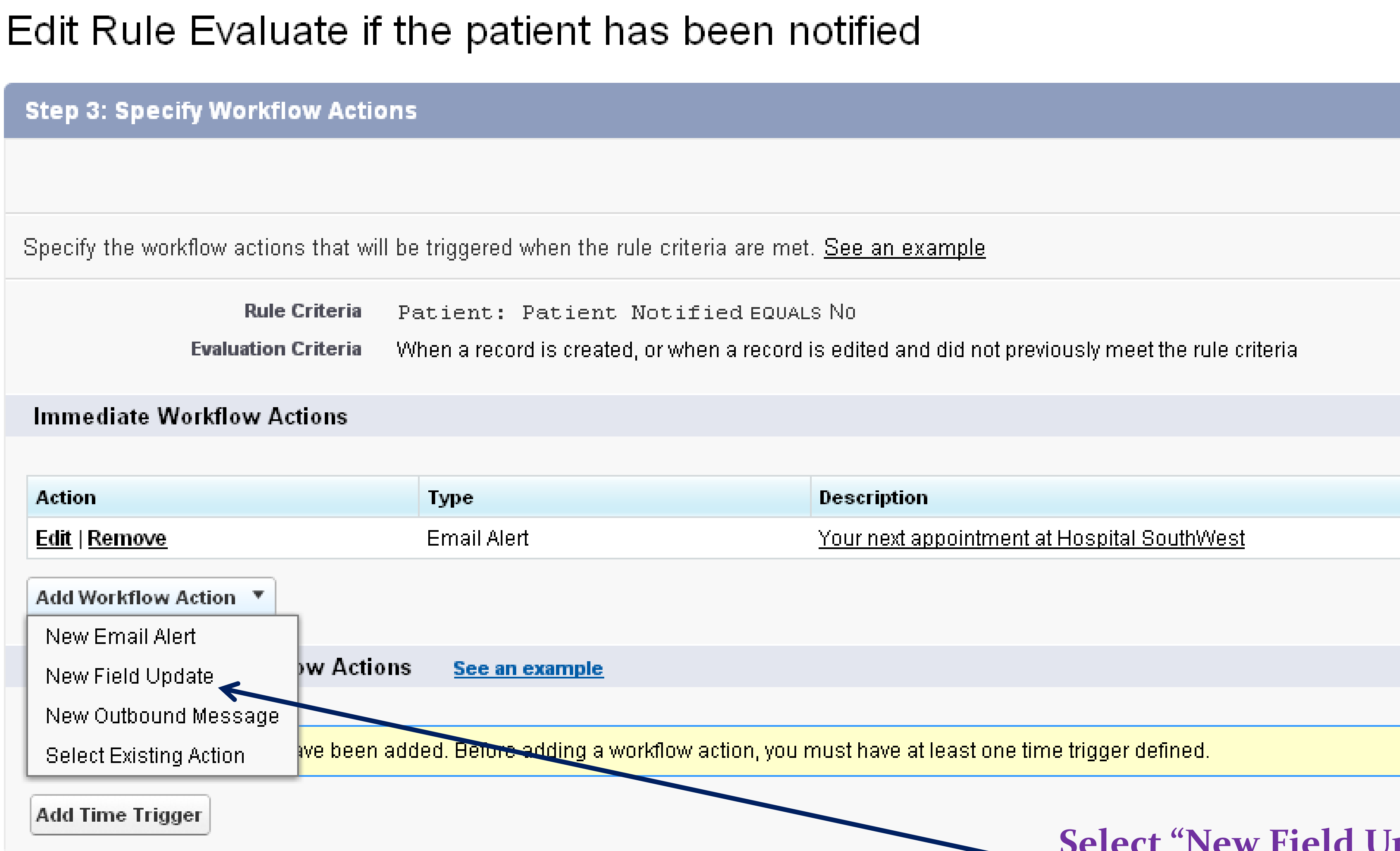
Step 1: Enter the description for the email to be sent out

Step 2: Select the Email Template defined for sending our reminder emails

Step 3: From the drop-down list select "Email Field" and select the Patients and Doctor's Email Address Field

Step 4: Save the workflow action

4(d) Define Workflow Action to automatically update the *Patient Notified?* object field



Select "New Field Update" as Workflow Action

4(d) Define Workflow Action to automatically update the *Patient Notified?* object field

Edit Field Update

Update the patient notified status

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and a related object. Fields are shown only for the type that you select.

Field Update Edit Save | Save & New | Cancel

Identification

Name	Update the patient notified
Unique Name	Update_the_patient_notifie
Description	This field is used to automatically update the patient notified status on the corresponding patient record
Object	Patient
Field to Update	Patient Notified
Field Data Type	Picklist
Re-evaluate Workflow Rules after Field Change	☐

Specify New Field Value

Picklist Options

- ◯ The value above the current one
- ◯ The value below the current one
- ◉ A specific value: Yes

Save | Save & New | Cancel

Step 1: Enter a name, description for the workflow action

Step 2: Select the field of the patient record that needs to be update

Step 3: Specify the new value for the Patient Notified Status?

Step 4: Select "New"

Activate Workflow

<u>Step 4:</u> Select "Activate" activate the workflow rule and its associated actions.

All Workflow Rules

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.com 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.com can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

View: All Workflow Rules   Create New View

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**

New Rule

Action	Rule Name ↑	Description
Edit | Del | Activate	Evaluate if the patient has been notified	This rule is used to determine if the patient has yet been notified of the next appointment time and date

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | **All**