

Salesforce Project Implementation Phases with Concepts (Admin + Developer)

Problem Statement:

Healthcare organizations often face challenges in managing patient records, scheduling appointments, tracking billing, and maintaining communication between patients, doctors, and administrative staff. Since updates and interactions are scattered across calls, paper records, and separate systems, this leads to inefficiency, missed appointments, delayed billing, and lower patient satisfaction.

Proposed Solution : A tailored CRM solution, PulsePoint CRM, is designed to centralize patient data, streamline appointment scheduling, automate billing generation, and enable doctors and staff to have real-time access to patient information. This solution improves healthcare workflow efficiency, reduces manual errors, and enhances overall patient care.

Phase 4: Process Automation

1. VALIDATION RULES:

Purpose: Ensure data integrity by enforcing conditions before saving a record.

- **Appointment :** The appointment start date and time must be of future.
- **Billing Amount :** Billing amount must be greater than 0.

Appointment Validation Rule

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Validation Rule Detail

Rule Name

Appt_Start_in_Future

Active

✓

Error Condition Formula

AND(
ISPICKVAL(Status__c, "Scheduled"),
Start_DateTime__c < NOW()
)

Error Message

Scheduled appointments must start in the future.

Error Location

Top of Page

Description

Created By

Dhruv Beotra 9/25/2025, 1:51 PM

Modified By

Dhruv Beotra 9/25/2025, 1:51 PM

Edit

Close

Appointment Validation Rule
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Validation Rule Detail
Edit Close

Rule Name	Billing_amt	Active	✓
Error Condition Formula	Billing__Amount__c <= 0		
Error Message	Billing Amount must be greater than zero.	Error Location	Top of Page
Description			
Created By	Dhruv Bedra, 9/25/2025, 1:54 PM	Modified By	Dhruv Bedra, 9/25/2025, 1:54 PM

Edit Close

2. WORKFLOW RULES:

Automate simple tasks like field updates, email alerts, and task creation based on conditions.

1. Send email to Remind of the appointment the next day.

SETUP
Workflow Rules

Edit Rule Reminder mail
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Step 3: Specify Workflow Actions
Step 3 of 3
Done

Specify the workflow actions that will be triggered when the rule criteria are met. [See an example](#)

Rule Criteria	ISPICKVAL(Status__c, "Scheduled")	
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria	

Immediate Workflow Actions

Action	Type	Description
Edit Remove	Email Alert	Reminder for Appointment tomorrow.

Add Actions

Time-Dependent Workflow Actions
[See an example](#)

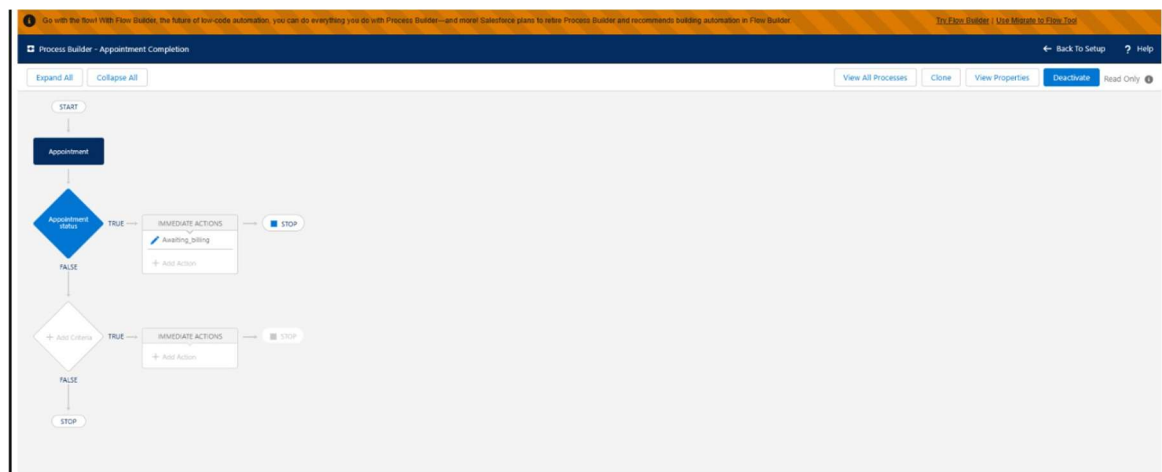
🕒 1 Day Before Rule Trigger Date	Edit Delete
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No workflow actions have been added to this time trigger.

3. **PROCESS BUILDER:**

Automate more complex business processes with multiple criteria and actions

1. Auto update the billing status to pending after an appointment is completed.



4. **FLOW BUILDER:**

Advanced automation: screen flows, auto-launched flows, record-triggered flows, scheduled flows.

- Auto Create invoice after an appointment is completed .

The image shows a Salesforce Flow Builder interface on the left and a 'Create Records' action configuration panel on the right.

Flow Builder (Left):

- Record-Triggered Flow:** Start
- Object:** Appointment
- Trigger:** A record is updated
- Conditions:** 1
- Optimize for:** Actions and Related Records
- Buttons:** Add Scheduled Paths (Optional), Open Flow Trigger Explorer for Appk...
- Flow Steps:**
 - Run Immediately** (Start)
 - Create Billing** (Create Records)
 - End** (End)

Create Records Panel (Right):

- * Label:** Create_Billing
- * API Name:** Create_Billing
- Description:**
- * How to set record field values:** Manually
- Create a Record of This Object:**
 - * Object:** Billing
- Set Field Values for the Billing:**
 - Field:** Amount **Value:** Search a field...
 - Field:** Status **Value:** Draft

5. EMAIL ALERTS:

Notify users automatically about events.

The image shows the Salesforce Email Template configuration page for 'Appointment Confirmation'.

Text Email Template: Appointment Confirmation

Preview your email template below.

Email Template Detail

Field	Value
Email Template Name	Appointment Confirmation
Template Unique Name	Appointment_Confirmation
Encoding	Unicode (UTF-8)
Author	Dhruv Beotra [Change]
Description	
Created By	Dhruv Beotra, 9/25/2025, 3:09 PM
Modified By	Dhruv Beotra, 9/25/2025, 3:10 PM

Email Template

Subject: Your appointment has been confirmed

Plain Text Preview:

```
Dear Patient,
This mail is to inform you that your appointment has been confirmed
```

6. APPROVAL PROCESS:

Ask for approval as soon as the billing amount exceeds the sum of 50,000.



SETUP

Approval Processes

Approval Processes

Billing: billing approval

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Process Definition Detail

[Edit](#) [Clone](#) [Deactivate](#)

Process Name	billing approval	Active	✓
Unique Name	billing_approval	Next Automated Approver Determined By	
Description			
Entry Criteria	Billing: Amount GREATER THAN 50000		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Billing Owner		
Created By	Dhruv Beotra, 9/25/2025, 3:05 PM	Modified By	Dhruv Beotra, 9/25/2025, 3:06 PM

Initial Submission Actions

[Add Existing](#) [Add New](#)

Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
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