

MediConnect — Phase 4: Process Automation

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Overview

- why process automation is needed in your project.

Example:

Phase 4 focuses on automating reminders, notifications, and task creation in MediConnect. This reduces manual work for the front desk, ensures timely follow-ups, and keeps Doctors/Coordinators informed.

1. Validation Rules

Purpose:

Ensure required fields are filled and data integrity is maintained.

Example: Billing → Insurance fields required for Insurance Billing.

Steps:

1. **Navigate:** Setup → Object Manager → Billing → Validation Rules → New
2. **Define Rule:**
 - **Name:** Insurance_Fields_Required
 - **Formula:**
AND(

RecordType.Name = "Insurance Billing",

OR(ISBLANK(Insurance_Provider__c), ISBLANK(Policy_Number__c))

)

- **Error Message:** "Insurance Provider and Policy Number are required."

3. Save & Activate

Billing Validation Rule

[Back to Billing](#)

Validation Rule Detail		Edit	Clone
Rule Name	Require_Insurance_Details_for_Insurance	Active	✓
Error Condition Formula	AND(\$RecordType.DeveloperName = "Insurance_Billing", OR(ISBLANK(Insurance_Provider__c), ISBLANK(Policy_Number__c)))		
Error Message	Insurance Provider and Policy Number must be filled for Insurance Billing records.	Error Location	Top of Page
Description			
Created By	Neha Doddi , 9/24/2025, 9:35 PM	Modified By	Neha Doddi , 9/24/2025, 9:35 PM

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

2. Email Templates & Email Alerts

Content:

- Purpose: Send reminders to patients for upcoming appointments.
- Steps:
 1. Setup → Email → Lightning Email Templates → New Template
 2. Folder: MediConnect Templates
 3. Template Name: Appointment_Reminder_Template
 4. Subject: Reminder: Your appointment on {{Appointment_Date__c}}
 5. Body: Include patient name, doctor, appointment date/time

Email Alert:

- Setup → Email Alerts → New
- Object: Appointment
- Email Template: Appointment_Reminder_Template
- Recipient: Patient Email field

The screenshot displays the Salesforce Classic Email Template editor. The left sidebar contains navigation links for Setup, Home, and Object Manager, along with a search bar. The main content area is titled 'Classic Email Templates' and shows the details for the 'Appointment_Reminder_Template'.

Email Template Detail

Field	Value	Field	Value
Email Template Name	Appointment_Reminder_Template	Available For Use	✓
Template Unique Name	Appointment_Reminder_Template_v2	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Neha Doddi (Change)		
Description			
Created By	Neha Doddi, 9/25/2025, 1:33 PM	Modified By	Neha Doddi, 9/25/2025, 1:33 PM

Email Template

Subject Reminder: Your appointment on ({Appointment_Date__c})

HTML Preview

Hi {!Appointment__c.Patient__r.Name},

This is a reminder for your upcoming appointment:

- Date & Time: {!Appointment__c.Appointment_Date__c}
- Doctor: {!Appointment__c.Doctor__r.Name}

Thank you,

MediConnect Team

Plain Text Preview

Hi ({Appointment__c.Patient__r.Name}),

This is a reminder that your appointment with Dr. {!Appointment__c.Doctor__r.Name} is scheduled on {!Appointment__c.Appointment_Date__c}.

Please be on time. If you have any questions, contact us at MediConnect CRM.

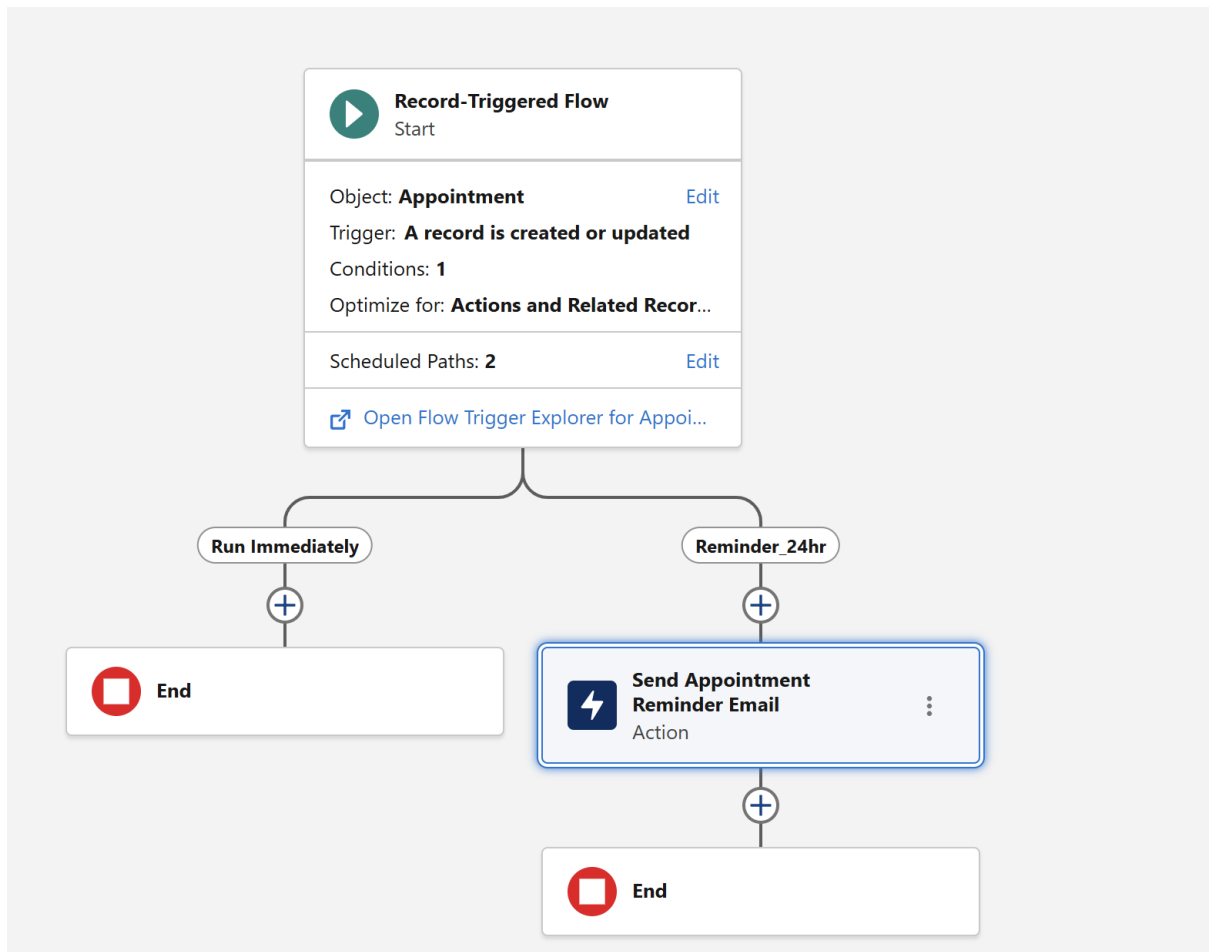
Thank you.

MediConnect Team

3. Record-Triggered Flows

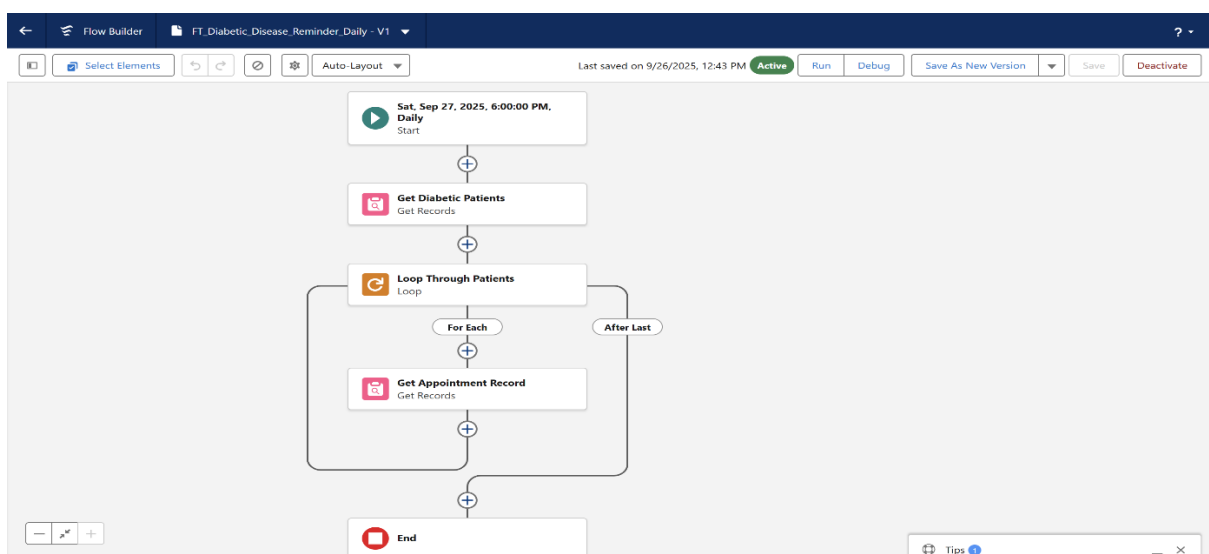
A) Appointment Reminder Flow

- Goal: Send email & custom notification 24 hours before the appointment.
- Setup → Flow → New → Record-Triggered Flow → Object: Appointment → Trigger: Created or Updated
- Scheduled Path: Reminder_24hr → Offset: -1 day from Appointment_Date__c
- Actions:
 - Send Email (via Email Alert)
 - Send Custom Notification → Notification Type: Appointment_Reminder



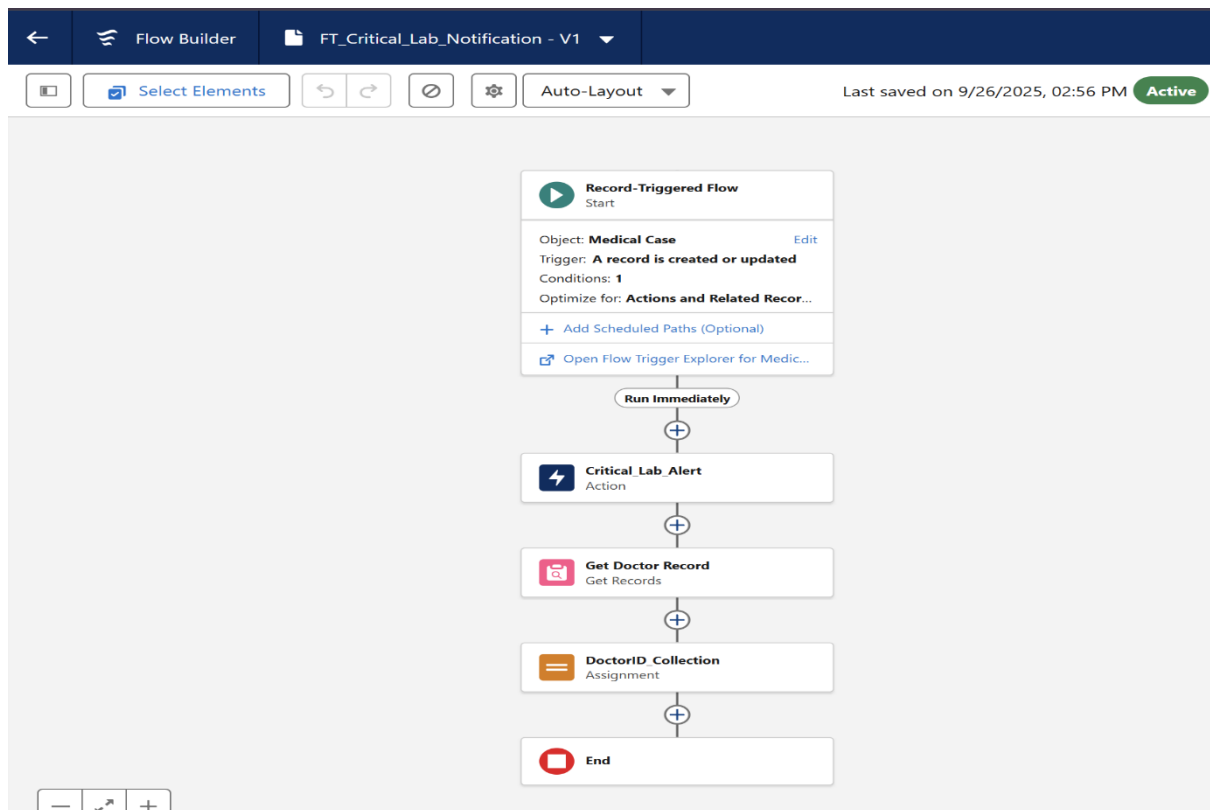
B) Diabetic-Condition Reminder Flow

- Goal: Daily task creation for patients with diabetic conditions.
- Setup → Flow → New → Schedule-Triggered Flow
- Get Records: Filter Patients with Diabetes
- Loop → Create Tasks or Appointments → Send Email (optional)



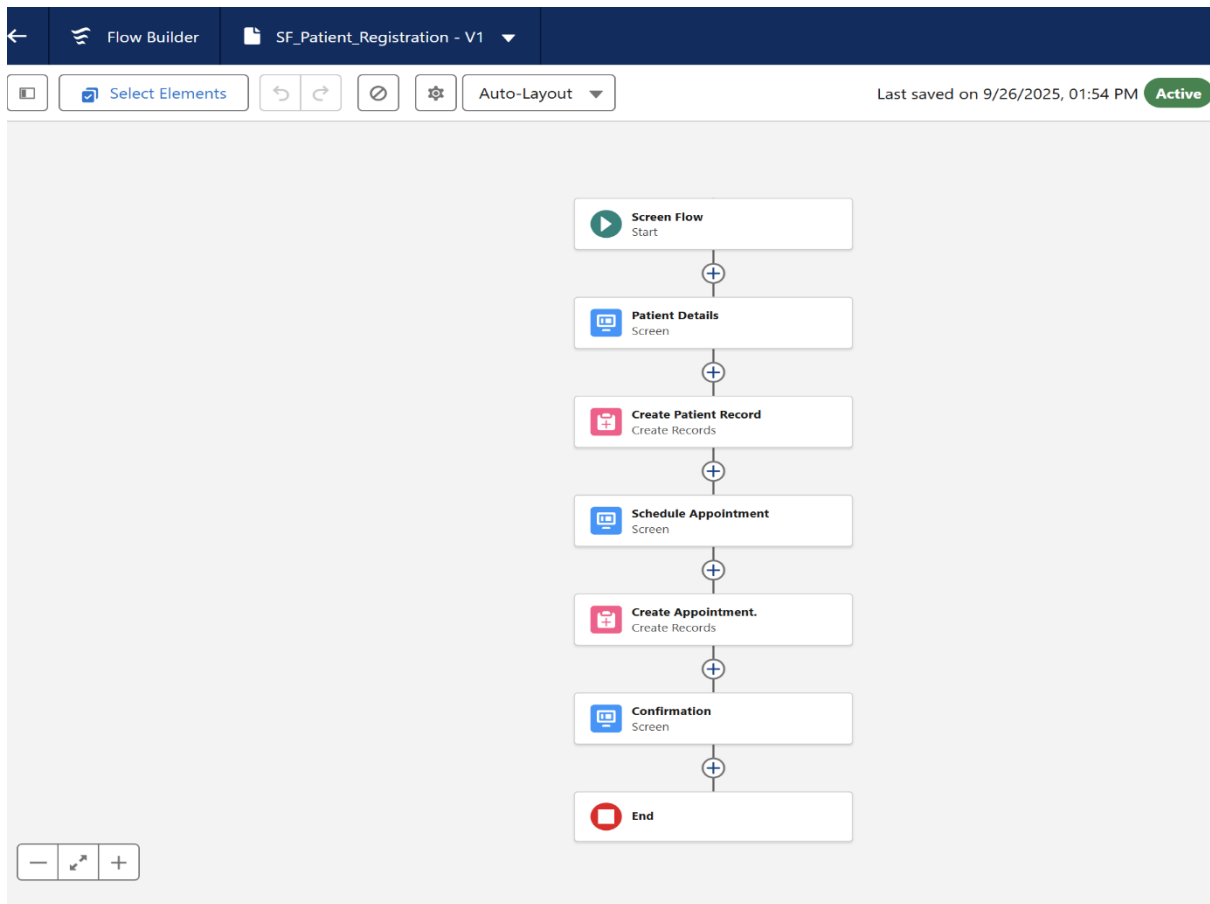
C) Lab Result Follow-up Task Flow

- Goal: Automatically create task for Nurse when Lab_Result_Status = 'Pending'
- Record-Triggered Flow → Object: Medical_Case
- Create Records → Task for Nurse



4. Screen Flow — Patient Registration

- Goal: Guided UI for front desk to create Patient + Appointment
- Setup → Flow → New → Screen Flow
- Screens:
 1. Patient Details → store values in variables
 2. Schedule Appointment → link to patient variable
 3. Finish Screen → display confirmation



5. Custom Notifications

- Critical Lab Alert
- Setup → Notification Builder → Notification Types → New → Name: Critical_Lab_Alert
- Flow Action → Send Custom Notification → Recipient: Doctor
- Input values: Title/Text: Critical Lab result for Patient

SETUP Custom Notifications				
<p>When you create and use custom notifications, the title and body of the custom push notification may be saved to and processed by Google, Microsoft and/or Apple. Salesforce is not responsible for the privacy and security practices of third-party systems or applications like Google Cloud Messaging or Apple Push Notification Service.</p>				
Custom Notification Types New				
Send custom notifications using Flows or Process Builder				
NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
Appointment_Reminder	Appointment_Reminder		✓	✓
Critical_Lab_Alert	Critical_Lab_Alert		✓	✓

6. Field Updates & Other Actions

- Use Update Records element in Flow instead of Workflow
- Example: Update Billing.Status__c = Approved after approval

