

# Phase 4: Process Automation in Health Log Project

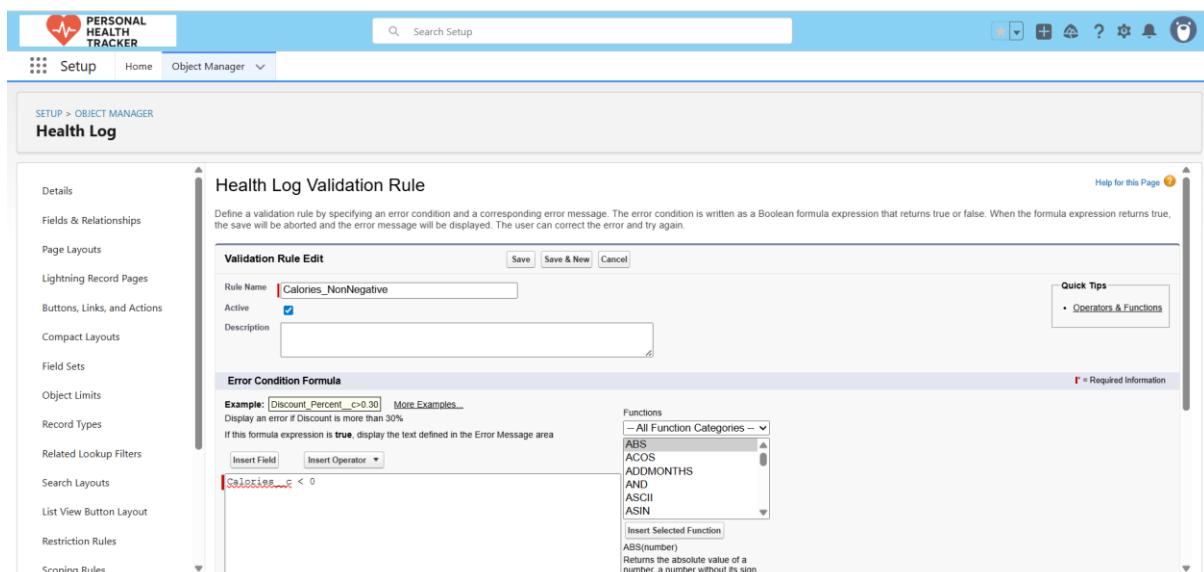
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## 1. Validation Rules (Data Accuracy)

📌 Example: Prevent users from entering **negative calories**.

- Setup → Object Manager → **Health Log** → Validation Rules → New.
- Rule Name: Calories\_NonNegative.
- Formula:
- Calories\_c < 0
- Error Message: *Calories cannot be negative.*
- Location: Field.

✓ Prevents bad data entry.



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## 2. Workflow Rules (Legacy)

📌 Example: Send reminder email when a **Medical Log** record is created.

- Setup → Workflow Rules → New Rule.
- Object: **Health Log**.
- Criteria: RecordType = Medical Log.
- Action: **Email Alert** (to Admin/User).
- Save & Activate.

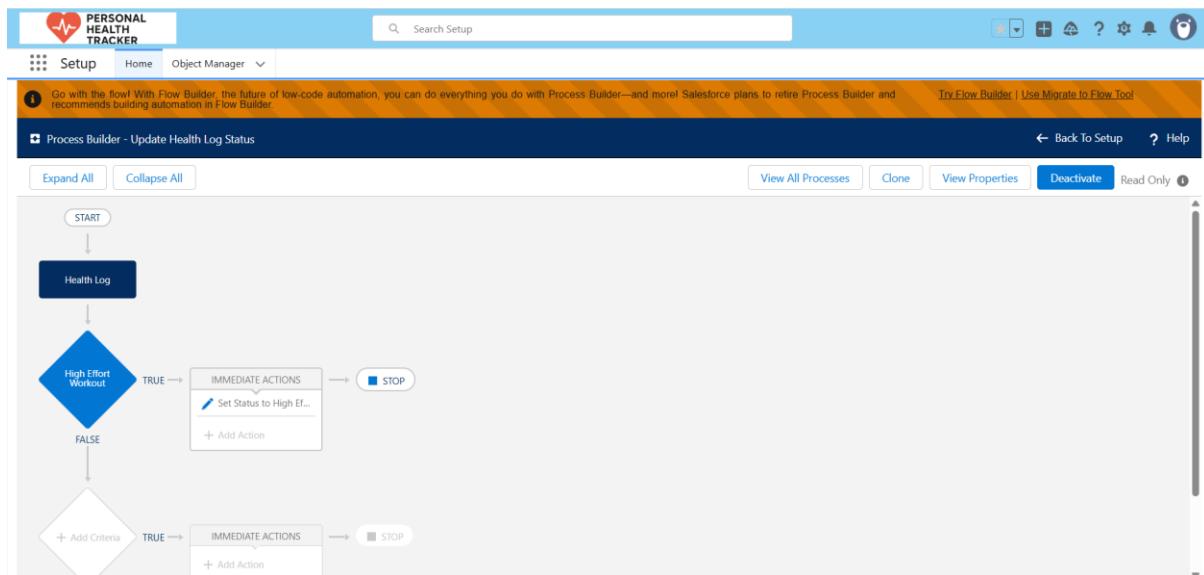
**⚠ Note:** Workflow Rules are legacy → better use **Flow** (step 5).

### 3. Process Builder (Legacy)

📌 Example: Auto-update Health Log status.

- Setup → Process Builder → New.
- Object: **Health Log**.
- Criteria: Calories\_Burned > 500.
- Action: Update Field → Set Status\_\_c = "High Effort".

**⚠ Also legacy → migrate to Flow later.**



### 4. Approval Process

📌 Example: Approve Medical Log entries before finalizing.

- Setup → Approval Processes → Select **Health Log (Medical Record Type)**.
- Enter Process Name: Medical Log Approval.
- Entry Criteria: RecordType = Medical Log.
- Steps:
  1. Submitted by User.
  2. First Approver: Admin.
- Final Approval → Status = “Approved”.
- Rejection → Status = “Rejected”.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** PERSONAL HEALTH TRACKER, Search Setup, Help for this Page
- Left Sidebar:** Approval Requests, Feature Settings, Approval Settings, Process Automation, Approval Processes (selected).
- Page Title:** Approval Processes, Health Log: Medical Log Approval
- Process Definition Detail:**
  - Process Name: Medical Log Approval
  - Unique Name: Medical\_Log\_Approval
  - Description: Approval required for Medical Logs before finalization.
  - Entry Criteria: Administrator ONLY
  - Record Editability: Active, Next Automated Approver Determined By Manager of Record Submitter
  - Approval Assignment Email Template: Diet Log Owner, Role: Admin
  - Initial Submitters: Diet Log Owner, Role: Admin
  - Created By: Saena Singh, 9/23/2025, 9:09 AM
  - Modified By: Saena Singh, 9/23/2025, 9:09 AM
  - Allow Submitters to Recall Approval Requests: Unchecked
- Initial Submission Actions:** Add Existing, Add New, Action Type: Record Lock, Description: Lock the record from being edited.
- Approval Steps:** New Approval Step, You have not yet defined any approval steps.

- ✓ Adds control for sensitive data.

## 5. Flow Builder (Recommended)

👉 Example: Auto-create a Task when a **Fitness Log** > 60 minutes.

- Setup → Flows → New Flow → Record-Triggered Flow.
- Object: **Health Log**.
- Trigger: On Create/Update.
- Condition: RecordType = Fitness Log AND Duration\_\_c > 60.
- Action: Create Task → Subject: “Review long workout session”, Assigned to: Admin.

- ✓ Modern, powerful automation.

The screenshot shows the Flow Builder interface with the following details:

- Flow Details:** Record-Triggered Flow, Start, Object: Health Log, Trigger: A record is created or updated, Conditions: 2, Optimize for: Actions and Related Recor...
- Flow Structure:** Run Immediately → End
- Configuration Sidebar (Configure Start):**
  - Select Object:** Health Log
  - Configure Trigger:** Trigger the Flow When:
    - A record is created
    - A record is updated
    - A record is created or updated (selected)
    - A record is deleted
  - Set Entry Conditions:** All Conditions Are Met (AND)

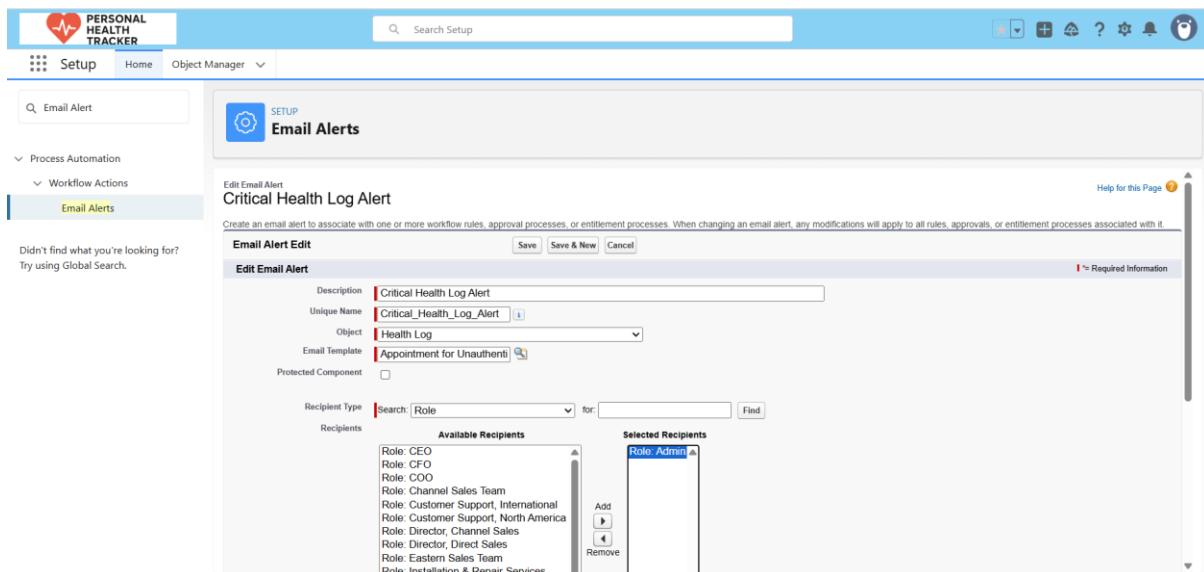
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## 6. Email Alerts

📌 Example: Notify Admin when **Critical\_Flag = TRUE**.

- Setup → Email Alerts → New.
- Template: “Critical Health Log Alert”.
- Recipients: Admin.
- Used in Workflow/Process/Flow.

✓ Keeps Admins updated instantly.



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## 7. Field Updates

📌 Example: Auto-set Health Log Status.

- If **Log\_Type = Diet AND Calories > 2500** → Update Status = High Calorie Day.
- Done via Workflow Rule or Flow.

✓ Reduces manual updates.

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## 8. Tasks(optional)

📌 Example: Follow-up task for medical visit.

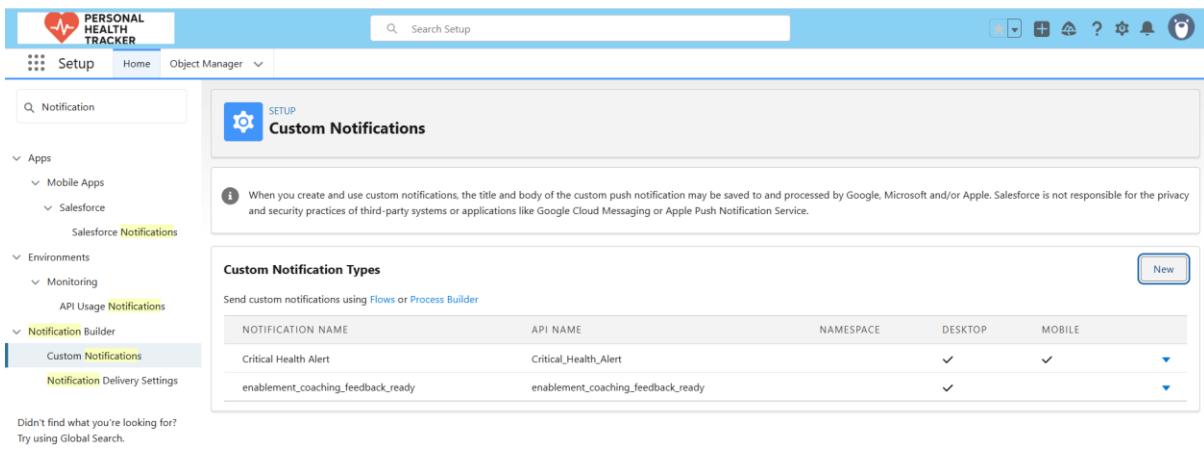
- Trigger: When a **Medical Log** is created.
- Automation: Flow → Create Task.
- Task Details: Subject = “Follow up with doctor”, Due Date = Today + 7 days.

-  Ensures follow-up actions are not missed.
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## 9. Custom Notifications

-  Example: Push notification to mobile when **Critical Flag = TRUE**.
- Setup → Notification Builder → Custom Notifications → New.
  - Name: “Critical Health Alert”.
  - Channel: Desktop & Mobile.
  - Add this notification to Flow → Action → Send Custom Notification.

-  Instant user alerts on Salesforce App.



The screenshot shows the Salesforce Setup interface with the following details:

- Left Navigation Bar:** Includes links for Apps (Mobile Apps, Salesforce), Environments (Monitoring, API Usage), and Notification Builder (Custom Notifications, Notification Delivery Settings). The "Custom Notifications" link is highlighted.
- Header:** Shows the "PERSONAL HEALTH TRACKER" app logo, the "Search Setup" bar, and various setup icons.
- Central Content Area:**
  - Section Header:** "SETUP Custom Notifications".
  - Information Message:** "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."
  - Section Header:** "Custom Notification Types".
  - Description:** "Send custom notifications using [Flows](#) or [Process Builder](#)".
  - Table:** Displays two rows of custom notification types.

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE
Critical Health Alert	Critical_Health_Alert		✓	✓
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓	▼
  - Buttons:** "New" button (top right) and "Edit" button (bottom right).