

Phase 4: Process Automation (Admin) – Smart Healthcare Project

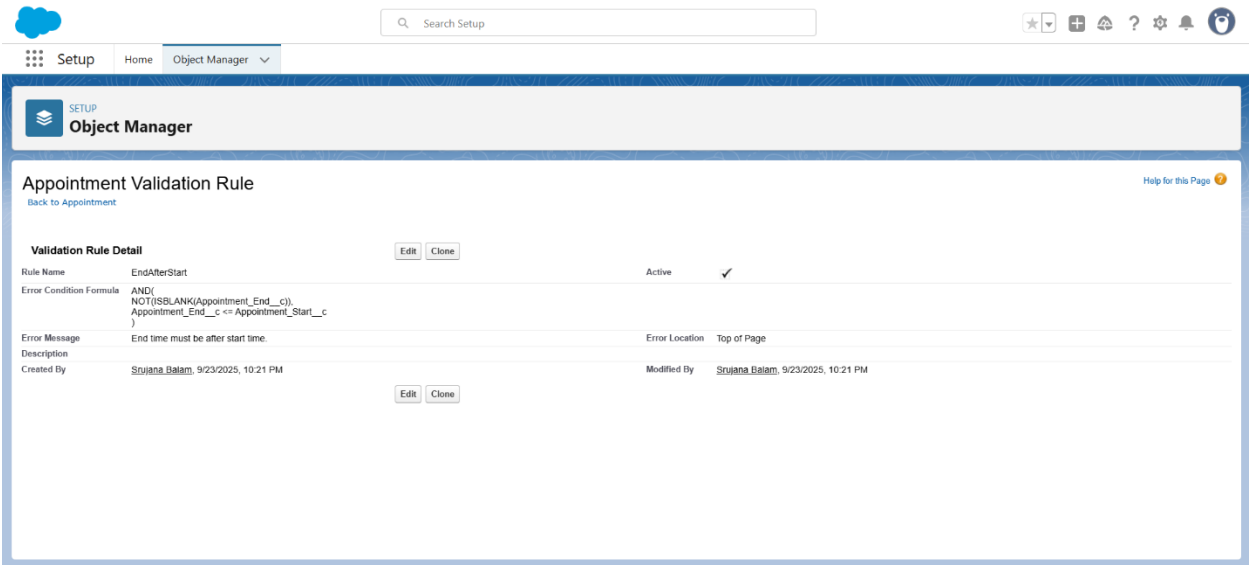
Tools Used: Validation Rules, Roll-Up Summary Fields, Record-Triggered Flow, Before-Save Flow, Approval Process, Reports & Dashboards.


1. Validation Rules (Data Quality)








Purpose: Prevent incorrect appointments.


Object: Appointment__c


Rule Name	Formula	Error Message
EndAfterStart	AND(NOT(ISBLANK(Appointment_End__c)), Appointment_End__c <= Appointment_Start__c)	"End time must be after start time."
NoPastAppointment	Appointment_Start__c < NOW()	"Appointment cannot be scheduled in the past."


















Setup

Home

Object Manager 



SETUP
Object Manager

Appointment Validation Rule

[Back to Appointment](#)
[Help for this Page](#)

Validation Rule Detail

EditClone

Rule Name	NoPastAppointment	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Appointment_Start__c < NOW()		
Error Message	Appointment cannot be scheduled in the past.	Error Location	Appointment_Start
Description			
Created By	Srujana Balam , 9/23/2025, 11:05 PM	Modified By	Srujana Balam , 9/23/2025, 11:05 PM

EditClone

2. Roll-Up Summary Fields

Purpose: Automatically count related records.

Object	Roll-Up Field	Summary Type	Related Object
Provider__c	Total_Appointments__c	COUNT	Appointment__c
Appointment__c	Total_Visits__c	COUNT	Visit__c
Visit__c	Total_Prescriptions__c	COUNT	Prescription__c

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Provider

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Provider Custom Field

Total_Appointments

Back to Provider

Help for this Page

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

Where is this used?

Field Information

Field Label	Total_Appointments	Object Name	Provider
Field Name	Total_Appointments		
API Name	Total_Appointments__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Srujana Balam, 9/23/2025, 11:10 PM	Modified By	Srujana Balam, 9/23/2025, 11:10 PM

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	COUNT
Summarized Object	Appointment		
Filter Criteria			

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Appointment Custom Field

Total_Visits

Back to Appointment

Help for this Page

Custom Field Definition Detail

Edit

Set Field-Level Security

View Field Accessibility

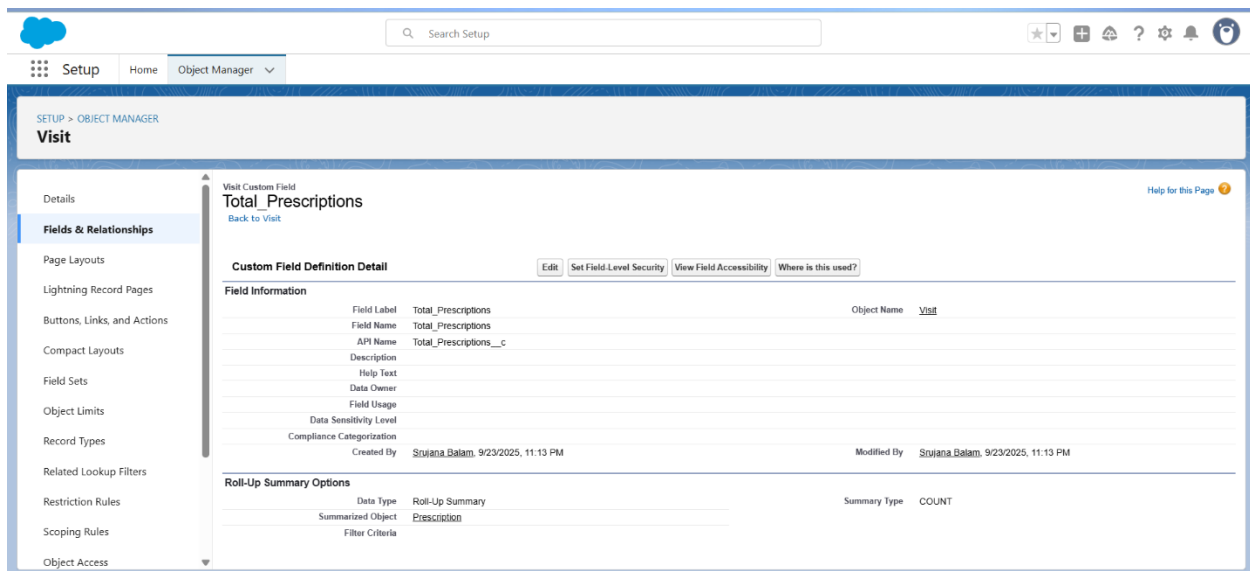
Where is this used?

Field Information

Field Label	Total_Visits	Object Name	Appointment
Field Name	Total_Visits		
API Name	Total_Visits__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Srujana Balam, 9/23/2025, 11:11 PM	Modified By	Srujana Balam, 9/23/2025, 11:11 PM

Roll-Up Summary Options

Data Type	Roll-Up Summary	Summary Type	COUNT
Summarized Object	Visit		
Filter Criteria			



3. Record-Triggered Flow (Appointment Reminder)

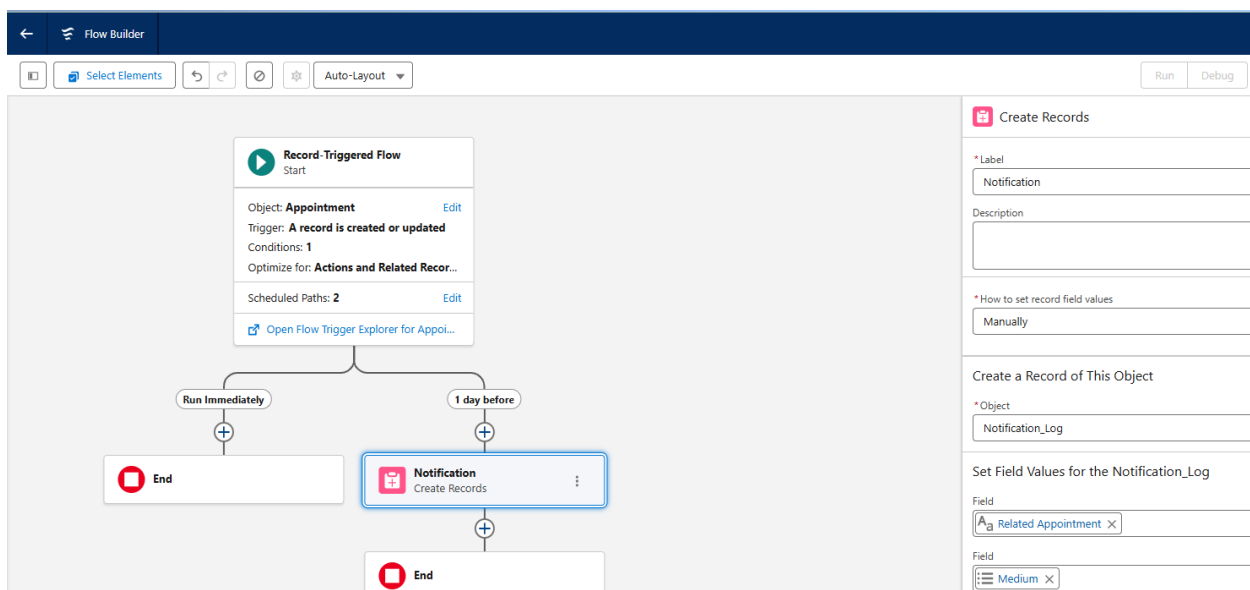
Purpose: Automatically send appointment reminders.

Object: Appointment__c

Trigger: When record is created or updated

Entry Criteria: Status__c = Scheduled

Scheduled Path: 1 day before Appointment_Start__c

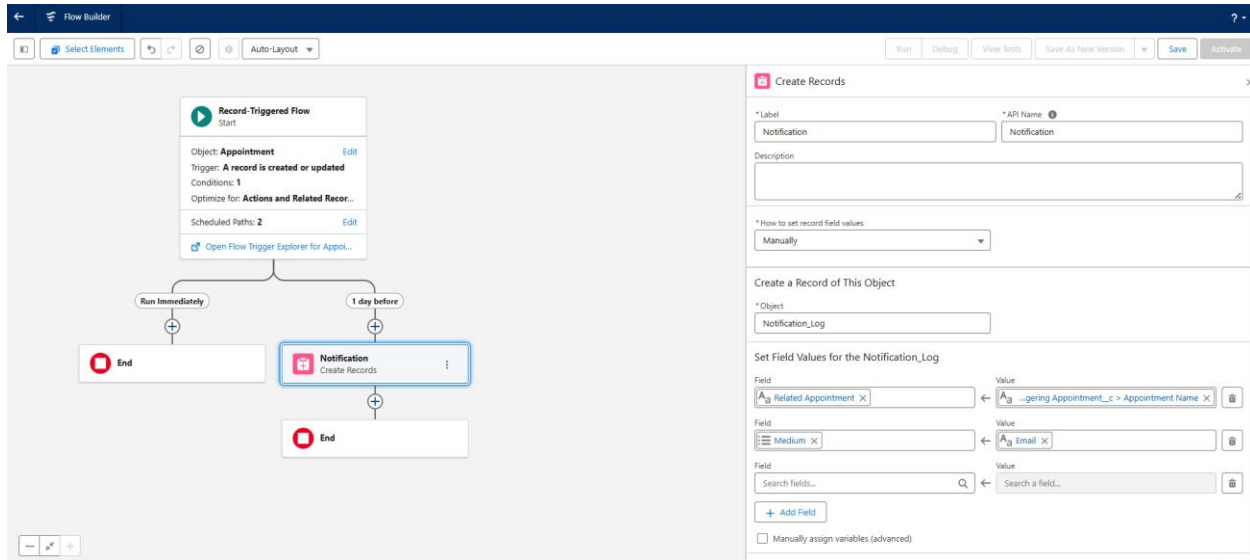


4. Before-Save Flow (Auto-populate Visit Patient)

Purpose: Auto-fill the patient field in Visits from the linked Appointment.

Object: Visit__c

Trigger: Before Save



5. Approval Process (Appointment Cancellation)

Purpose: Prevent accidental appointment cancellations.

Object: Appointment__c

Entry Criteria: Status__c = Cancelled

Approver: Clinic Manager (System Admin)

Action Type Action

Approval Keep Status__c = Cancelled

Rejection Reset Status__c = Scheduled

Setup Home Object Manager

Search Setup

approval

Approval Processes

Approval Processes
Appointment: Appointment Cancellation Approval

Process Definition Detail

Process Name Appointment Cancellation Approval Active ☐

Unique Name Appointment_Cancellation_Approval Next Automated Approver Determined By

Description

Entry Criteria Appointment: Status EQUALS Cancelled

Record Editability Administrator ONLY Allow Submitters to Recall Approval Requests ☐

Approval Assignment Email Template Cancelled Service Appointment Confirmation Email

Initial Submitters Provider Owner

Created By Sujana Balam 9/24/2025, 12:54 AM Modified By Sujana Balam 9/24/2025, 12:57 AM

Initial Submission Actions

Action Type Description

Record Lock Lock the record from being edited

Approval Steps

New Approval Step

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Step 1	1	Step 1			User: Sujana Balam	Final Rejection

Final Approval Actions

Action Type Description

Record Lock Lock the record from being edited

approval

Approval Processes

Initial Submission Actions

Action Type Description

Record Lock Lock the record from being edited

Approval Steps

New Approval Step

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Step 1	1	Step 1			User: Sujana Balam	Final Rejection

Final Approval Actions

Action Type Description

Record Lock Lock the record from being edited

Field Update Approval_status

Final Rejection Actions

Action Type Description

Record Lock Unlock the record for editing

Field Update Rejection_status

Recall Actions

Action Type Description

Record Lock Unlock the record for editing

6. Reports & Dashboard

Purpose: Provide live insights to admins and doctors.

Reports

1. Appointments by Provider

- Report Type: Appointments
- Filter: All Appointments
- Group by: Provider__c

2. Upcoming Appointments Today

- Report Type: Appointments

- Filter: Status__c = Scheduled AND Appointment_Start__c = TODAY()

Smart Healthcare C... Home Contacts Accounts Reports Dashboards Appointments Notification_Logs Prescriptions Providers Visits

REPORT Appointments by Provider Appointments

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Provider: Provider Name	Appointment Name
Dr. Ramesh Kumar (1)	Check-up Anita Sharma
Subtotal	
Total (1)	

Row Counts Detail Rows Subtotals Grand Total

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REPORT Upcoming Appointments Today Appointments

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Appointment Name
1 Check-up Anita Sharma

Appointment Name

Dashboard: Smart Healthcare Snapshot

Components:

- **Bar Chart:** Total Appointments per Provider (source: Appointments by Provider)
- **Table:** Upcoming Appointments Today
- **Number:** Total Prescriptions This Month (source: Visit or Prescription report)

