Phase 4: Process Automation (Admin)

1.Validation Rules

- Ensure data quality by preventing invalid records.
- **Rule Name:** Appointment _End _After _Start
- **Formula:** Appointment _End __c <= Appointment _Start __c
- **Error Message:** End time must be after start time.

- **Test:** Try saving an appointment where end ≤ start → should be blocked.

RULE NAME		ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Validation Rules 5 Items, Sorted by Rule Name						New
Appointment_End_After_Start		Appointment End	End time must be after the start time.	✓	Ojaswini Yadari, 10/11/2025, 11:05 PM	▼
Appointment_In_Future		Appointment Start	Appointment must be scheduled for a future time.	✓	Ojaswini Yadari, 10/11/2025, 11:10 PM	▼
Appointment_Minimum_Duration		Top of Page	Appointment must be at least 15 minutes long.	✓	Ojaswini Yadari, 10/11/2025, 11:17 PM	▼
Doctor_Must_Be_Assigned		Doctor	Please assign a doctor for this appointment.	✓	Ojaswini Yadari, 10/11/2025, 11:12 PM	▼
Patient_Must_Be_Assigned		Patient	Please assign a patient for this appointment.	✓	Ojaswini Yadari, 10/11/2025, 11:14 PM	▼

2.Workflow Rules

- Automate simple actions on record create/edit.
- Auto-assign Status on Appointment creation.
- **Object:** Appointment __ c
- **Criteria:** Status __c is blank
- **Action:** Field Update → Status__ c = Scheduled

SETUP
Workflow Rules

Edit Rule Auto_Assign_Status

Step 3: Specify Workflow Actions

Specify the workflow actions that will be triggered when the rule criteria are met. See an example

Rule Criteria   ISBLANK(TEXT(status__c))
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	Field Update	Set_Status_to_Scheduled

Add Actions ▼

Time-Dependent Workflow Actions   See an example

ⓘ No workflow actions have been added. Before adding a workflow action, you must have at least one time trigger defined.

Add Time Trigger
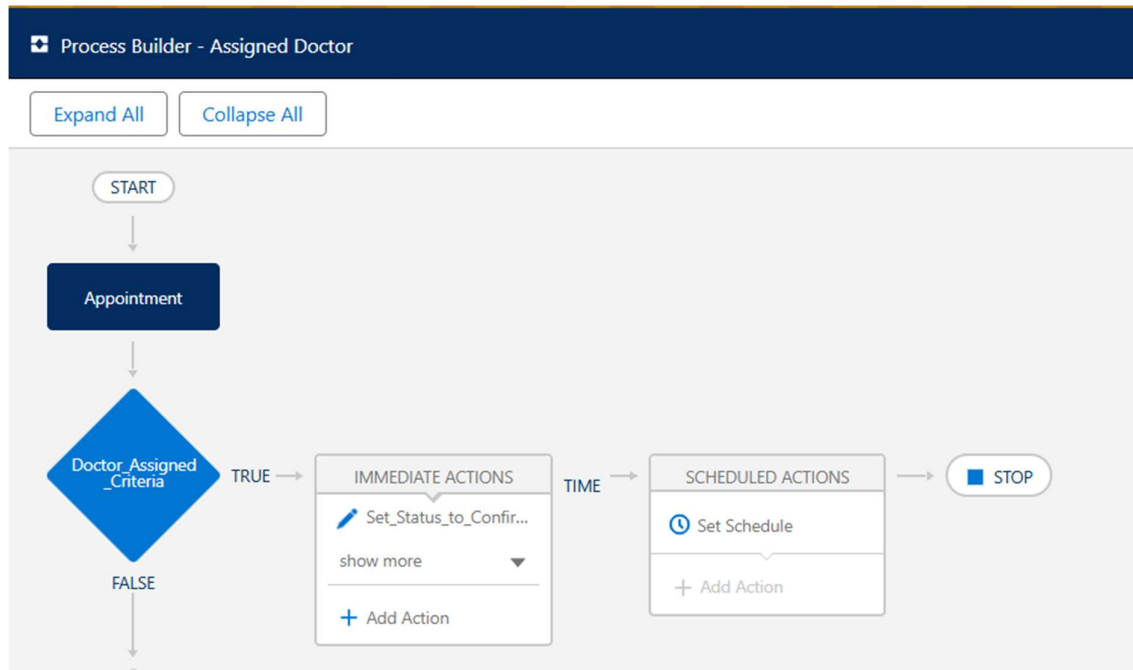
3. Process Builder

Purpose: Automate more complex processes with multiple actions.
Example: Update patient record when doctor is assigned.

Object: Patient__c

Trigger: Record created or updated

Action: Update Patient Status → "Assigned"

4. Approval Process

Purpose: Manage record approval workflows.
Example: Approve large consultation fee discounts.

- Object: Appointment __c

- Entry Criteria: Consultation _Fee _Discount __c > 30 OR Requires _Approval __c = TRUE

- Approver: Hospital Admin Role

- Actions:

  o Approve → Field Update: Approval _Status __c = Approved

  o Reject → Field Update: Approval _Status __c = Rejected

5. Flow Builder

Purpose: Modern tool for automations, replacing Workflow & Process Builder.
Examples (Record-Triggered Flows):

1. Auto-share Patient: When Assigned_Doctor __c is set, create Patient __Share.

2. Auto-set Appointment Status: When appointment created → Status __c = Scheduled

3. Create Follow-up Task: When appointment scheduled → Task for assigned doctor

6. Email Alerts

Purpose: Send automated emails for record updates or actions.
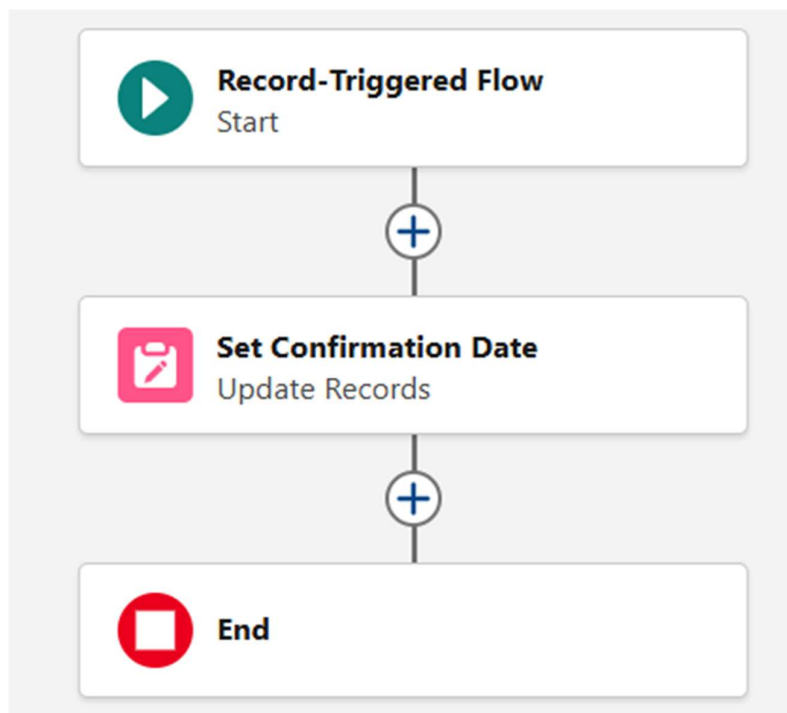Example: Send appointment confirmation email.

- Object: Appointment __c

- Trigger: Status __c = Confirmed

- Action: Email Alert → To Patient → From appointments@smarthealthclinic.com

7. Field Updates

Purpose: Automatically update fields based on record changes.
Example:

- Field: Confirmation _Date__ c

- Object: Appointment__ c

- Trigger: Status __c = Confirmed

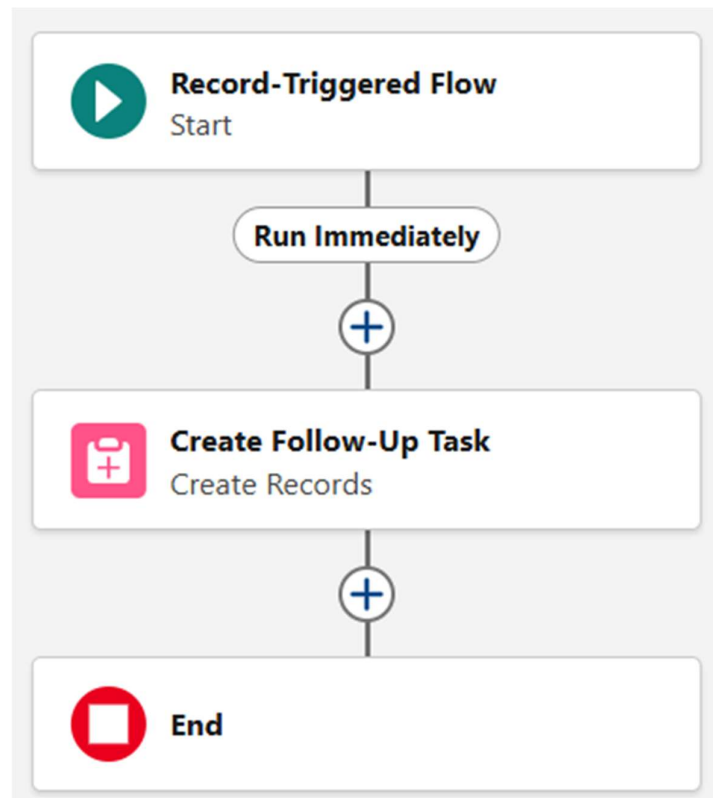- Update: Confirmation_ Date__ c = TODAY()

8. Tasks

Purpose: Create reminders or follow-up tasks automatically.
Example:

- Object: Appointment__ c

- Trigger: Status__c = No-Show
- Action: Create Task → Assigned to Receptionist → Reminder to call patient

9. Custom Notifications

Purpose: Push real-time alerts to Salesforce users.
Example: Notify doctor when a new patient is assigned.

- Object: Patient__c
- Trigger: Assigned_ Doctor __c updated
- Action: Send Custom Notification → Recipient = Assigned Doctor (User Id)
- Message: "You have been assigned a new patient: [Patient Name]."