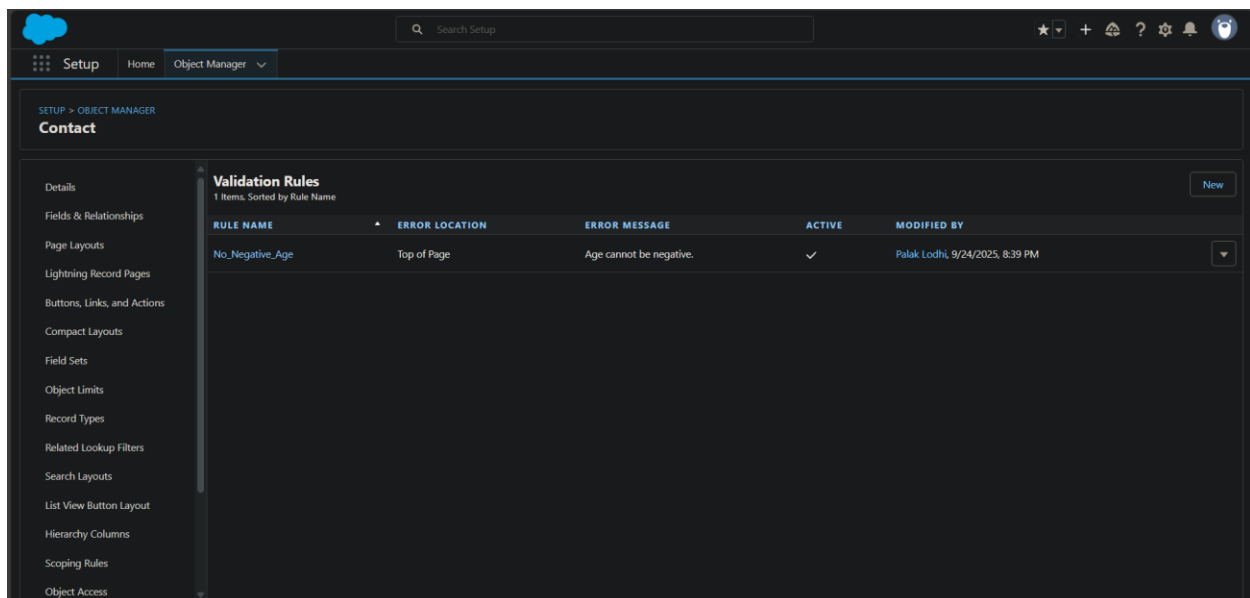


Phase 4: Process Automation (Admin)

In this phase, we implemented automation features to reduce manual work and ensure smooth hospital appointment and patient management. Below are the tools considered:

Validation Rules

- Created a validation rule on **Patient Age** to ensure that no negative values can be entered.
- This prevents incorrect data entry and improves data accuracy.



Workflow Rules

Workflow Rules allow automatic actions (field updates, emails, tasks) when conditions are met.

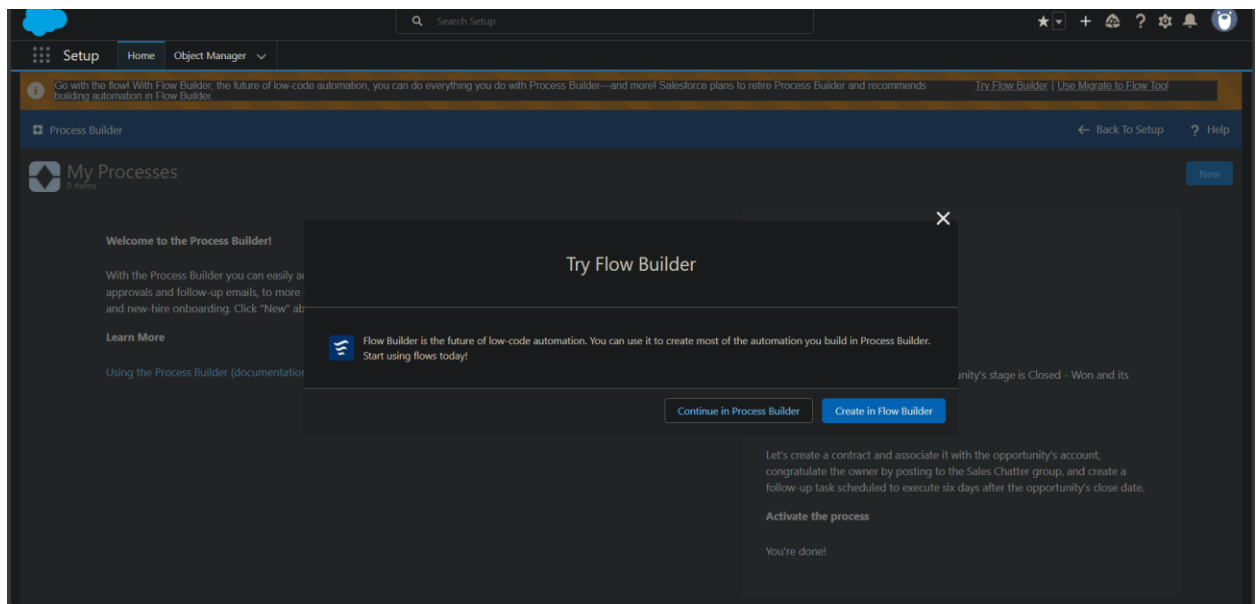
- **Decision:** Not implemented in this project.
- **Reason:** Salesforce is retiring Workflow Rules, and instead recommends using **Flow Builder** for all new automation.

- **Benefit:** Sticking to Flows ensures the project is future-proof and aligned with Salesforce best practices.

Process Builder

Process Builder allows building automation with conditions and actions.

- **Decision:** Not used in this project.
- **Reason:** Salesforce is also retiring Process Builder, and functionality has moved to **Flow Builder**.
- **Note:** In older Salesforce implementations, Process Builder was often used, but here we skipped it in favor of modern automation.



Approval Process

Approval Processes are used when records need approval from managers or other roles.

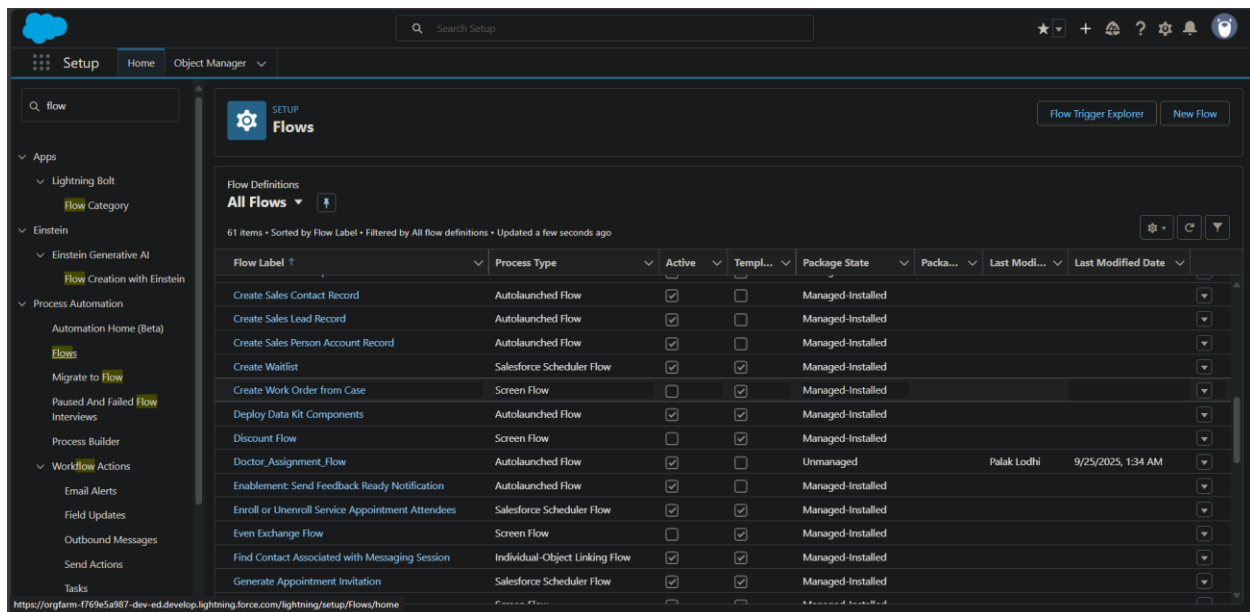
- **Decision:** Not required in this project.
- **Reason:** The hospital management system does not require formal approvals (e.g., no manager approval needed when assigning a doctor to a patient).

- **Future Scope:** If required, approvals can be added for cases like billing approvals or treatment cost approvals.

Flow Builder

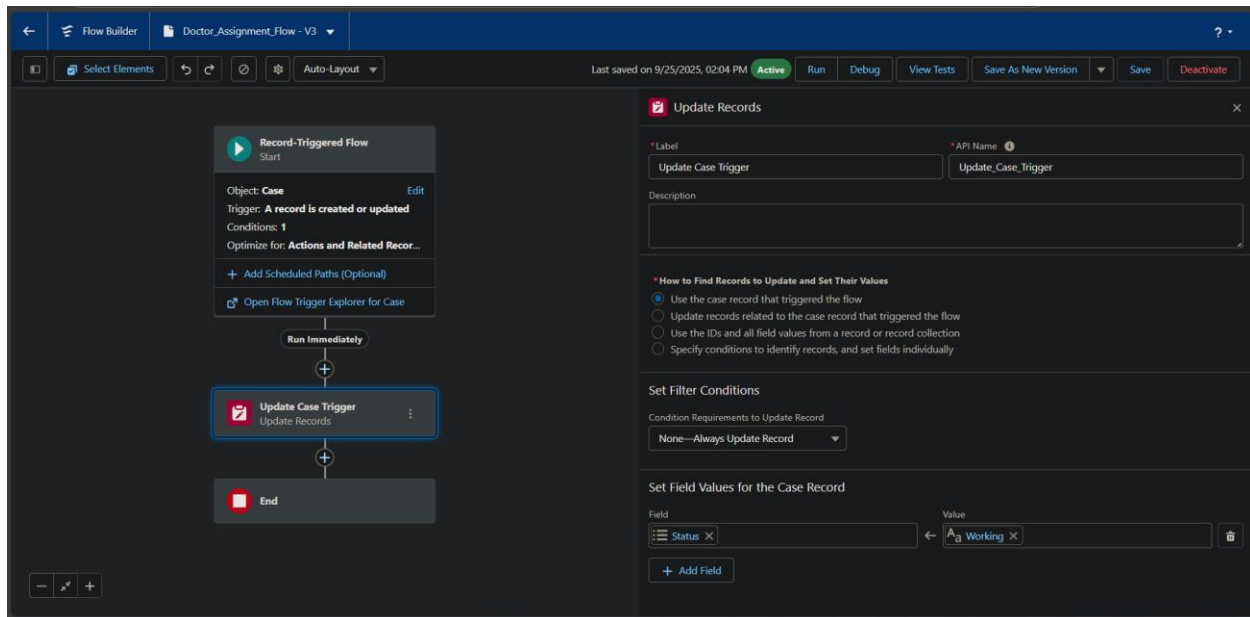
Flow Builder is the main automation tool used in this project.

- **Flow Created: Doctor Assignment Flow**
- **Type:** Record-Triggered Flow on **Case (Treatment/Appointment)** object
- **Trigger:** When a Case is created or updated **and a Doctor is assigned**
- **Actions Configured:**
 1. **Optional – Send Notification/Email:** Notify the assigned Doctor about the new patient case.
 2. **Optional – Update Records:** Update Case Status automatically to *In Progress*.
- **Purpose:** Eliminates the need for manual communication and ensures cases move forward as soon as a doctor is assigned



The screenshot displays the Salesforce Flow Builder interface. The left sidebar shows a navigation menu with categories like Apps, Einstein, Process Automation, and Workflow Actions. The main area is titled 'SETUP Flows' and shows a list of flow definitions. The table below represents the data shown in the 'All Flows' list.

Flow Label	Process Type	Active	Templ...	Package State	Packa...	Last Modi...	Last Modified Date
Create Sales Contact Record	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Create Sales Lead Record	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Create Sales Person Account Record	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Create Waitlist	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Create Work Order from Case	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Deploy Data Kit Components	Autolaunched Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Discount Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Doctor_Assignment_Flow	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Palak Lodhi	9/25/2025, 1:34 AM
Enablement: Send Feedback Ready Notification	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Enroll or Unenroll Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Even Exchange Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Find Contact Associated with Messaging Session	Individual-Object Linking Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Generate Appointment Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			



Email Alerts

Email Alerts are usually created in Workflow/Process Builder, but here they were handled inside **Flow Builder**.

- **Optional Step Implemented in Flow:** Send an email to the assigned Doctor.
- **Content:** Email includes Case Number, Patient Name, and Treatment Notes.
- **Purpose:** Keeps Doctors updated instantly when they are assigned a new case.

Field Updates

Field Updates are normally done using Workflow Rules, but in this project, we used **Flow Builder** to achieve the same result.

- **Action in Flow:** Update Case record when a doctor is assigned.
- **Field Changed:** Case Status

- **New Value:** *In Progress* (to show that the case is being worked on).
- **Purpose:** Automates status tracking, so users don't have to manually update case stages.

Tasks

Tasks can be created automatically to remind users of pending work.

- **Decision:** Not created separately in this project.
- **Reason:** Doctors are notified by email/flow action, so an additional Task was not required.
- **Future Scope:** Could be added later to automatically create follow-up tasks for Receptionists or Doctors.

Custom Notifications

Custom Notifications allow in-app alerts instead of emails.

- **Decision:** Not used in this project.
- **Reason:** Email notification was sufficient for informing Doctors.
- **Future Scope:** Could be implemented if the hospital prefers in-app Salesforce notifications instead of emails.