

Project Title: Smart Pharmacy Inventory Tracker

Phase 4: Process Automation (Admin)

Validation Rules:

1.Navigate to **Setup** → **Object Manager** → **Medicine** → **Validation Rules** → **New**.

2.Create rule to prevent negative stock:

- Rule Name: Quantity_Positive
- Formula: $\text{Quantity_c} < 0$
- Error Message: “Quantity cannot be negative.”

3.Create rule to restrict expiry date:

- Rule Name: ExpiryDate_Not_Past
- Formula: $\text{Expiry_Date_c} < \text{TODAY}()$
- Error Message: “Expiry date must be today or later.”

Validation Rules					New
2 Items, Sorted by Rule Name					
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
Future_Expiry_Date	Expiry_Date	Expiry date must be today or later.	✓	Shreyash Babhulkar, 9/21/2025, 8:41 PM	▼
Quantity_Positive	Quantity	Quantity cannot be negative.	✓	Shreyash Babhulkar, 9/21/2025, 8:39 PM	▼

Workflow Rules:

1.Go to **Setup** → **Workflow Rules** → **New Rule**.

2.Object: Medicine.

3.Rule Name: Low Stock Alert.

4.Criteria: $\text{Quantity_c} \leq \text{Reorder_Level_c}$.

5.Add Workflow Action → **New Email Alert**.

- Template: “Low Stock Alert”.
- Recipient: Store Manager.

6.Activate rule.

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Go with the flow! With Flow Builder, the future of low-code is here. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:


- ### Quick Tips

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A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

- Approved \rightarrow Update Status = Approved.
- Rejected \rightarrow Update Status = Rejected.

SETUP

Approval Processes

Approval Processes

Order: PO Approval

[Back to Approval Process List](#)

Help for this Page

Process Definition Detail

EditCloneDeleteActivate

Process Name

PO Approval

Active

☐

Unique Name

PO_Approval

Next Automated Approver Determined By

Description

Entry Criteria

Order: Total_Amount GREATER THAN 10000

Record Editability

Administrator ONLY

Allow Submitters to Recall Approval Requests

☐

Approval Assignment Email Template

Initial Submitters

Order Owner

Created By

Shreyash Babhulkar, 9/22/2025, 6:58 AM

Modified By

Shreyash Babhulkar, 9/22/2025, 7:04 AM

Initial Submission Actions

Add ExistingAdd New

ActionType

Description

Record Lock

Lock the record from being edited

Approval Steps

New Approval Step

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Step 1			User Vaibhav Chinche	Final Rejection

Flow Builder:

Flows Implemented:

A. Screen Flow (Supplier Creation Wizard)

- Collect Supplier Name, Phone, Email via screen.
- Create Supplier record.

B. Record-Triggered Flow (Auto Reorder Request)

- Object: Medicine.
- Trigger: After Save.
- Criteria: Quantity__c <= Reorder_Level__c.
- Action: Create Reorder Request.

C. Scheduled Flow (Expiry Check)

- Frequency: Daily at 6 AM.
- Get Medicines expiring in 30 days.
- Send email notification to Manager.

D. Auto-launched Flow (Optional)

- Generate supplier report from button click.

Email Alerts:

1.Setup → Email Alerts → New.

2.Object: Medicine.

3.Template: “Expiry Alert”.

4.Recipient: Manager.

5.Add alert to Workflow Rule or Flow.

SETUP Email Alerts

Email Alert

Email alert to notify Manager when medicine stock falls to or below reorder level.

[Rules Using This Email Alert \(0\)](#) | [Approval Processes Using This Email Alert \(0\)](#) | [Entitlement Processes Using This Email Alert \(0\)](#)

Email Alert Detail [Edit](#) [Delete](#) [Clone](#)

Description	Email alert to notify Manager when medicine stock falls to or below reorder level.	Email Template	Low Stock Alert Template
Unique Name	Low_Stock_Alert	Object	Medicine
From Email Address	Current User's email address		
Recipients	User_Vivek Tongle User_Valbhav Chinchu		
Additional Emails			
Created By	Shreyash Babhulkar: 9/21/2025, 9:31 PM	Modified By	Shreyash Babhulkar: 9/21/2025, 9:31 PM

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Field Updates:

1. Setup → Workflow Rules → Add Action → Field Update.
2. Example: On Order Approval, update Status__c = Approved.
3. Save.

All Workflow Rules [Help for this Page](#)

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

Quick Tips

- [Useful Sample Workflow Rule](#)
- [Video Tutorial \(English Only\)](#)
- [Troubleshooting Workflow](#)

View: **All Workflow Rules** | [Create New View](#)

Action	Rule Name ↑	Description	Object	Active
Edit Del Deactivate	Low Stock Alert		Medicine	✓
Edit Del Deactivate	Set Status To Approved		Order	✓

Tasks:

1. In Workflow or Process Builder → Add Action → Create Task.
2. Subject: “Check Medicine Expiry”.
3. Assigned To: Pharmacist user.
4. Due Date: TODAY() + 2.

Task [Help for this Page](#)

Check Medicine Expiry

[Rules Using This Task \(0\)](#) | [Approval Processes Using This Task \(0\)](#) | [Entitlement Processes Using This Task \(0\)](#)

Workflow Task Detail [Edit](#) [Delete](#) [Clone](#)

Object	Medicine	Status	Not Started
Assigned To	User - Vivek Tongle	Priority	High
Subject	Check Medicine Expiry		
Unique Name	Check_Medicine_Expiry		
Due Date	Rule Trigger Date + 2 days		
Comments			
Created By	Shreyash Babhulkar: 9/21/2025, 10:10 PM	Modified By	Shreyash Babhulkar: 9/21/2025, 10:10 PM

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Custom Notifications:

1. Setup → Notification Builder → Custom Notifications → New.
 - Name: Low Stock Notification.
2. In Flow: Add Action → Send Custom Notification.
3. Recipient: Manager.



SETUP

Custom Notifications

i 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.

Custom Notification Types

[New](#)

Send custom notifications using [Flows](#) or [Process Builder](#)

NOTIFICATION NAME	API NAME	NAMESPACE	DESKTOP	MOBILE	
enablement_coaching_feedback_ready	enablement_coaching_feedback_ready		✓		▼
Low Stock Notification	Low_Stock_Notification		✓	✓	▼