

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 2 Items, Sorted by Rule Name					New
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.

[Help for this Page](#)

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:

- 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.

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


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**

				New Rule
Action	Rule Name ↑	Description	Object	Active
Edit Del Deactivate	Low_Stock_Alert		Medicine	✓
Edit Del Deactivate	Set_Status_To_Approved		Order	✓

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**

Approval Process:

- 1.Go to Setup → Approval Processes → New Approval Process (Jump Start).
- 2.Object: Order.
- 3.Name: PO Approval.
- 4.Criteria: Total_Amount__c > 10000.
- 5.Approver: Manager.
- 6.Final Actions:
 - Approved → Update Status = Approved.
 - Rejected → Update Status = Rejected.



[SETUP](#)

Approval Processes

Approval Processes
Order: PO Approval

[< Back to Approval Process List](#)

[Help for this Page](#)

Process Definition Detail

Edit ▾
Clone
Deactivate

Process Name	PO Approval			Active	<input checked="" type="checkbox"/>
Unique Name	PO_Appoval			Next Automated Approver Determined By	
Description					
Entry Criteria	Order: Total_Amount GREATER THAN 10000				
Record Editability	Administrator ONLY			Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
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, 7:09 AM

Initial Submission Actions

Add Existing
Add New ▾

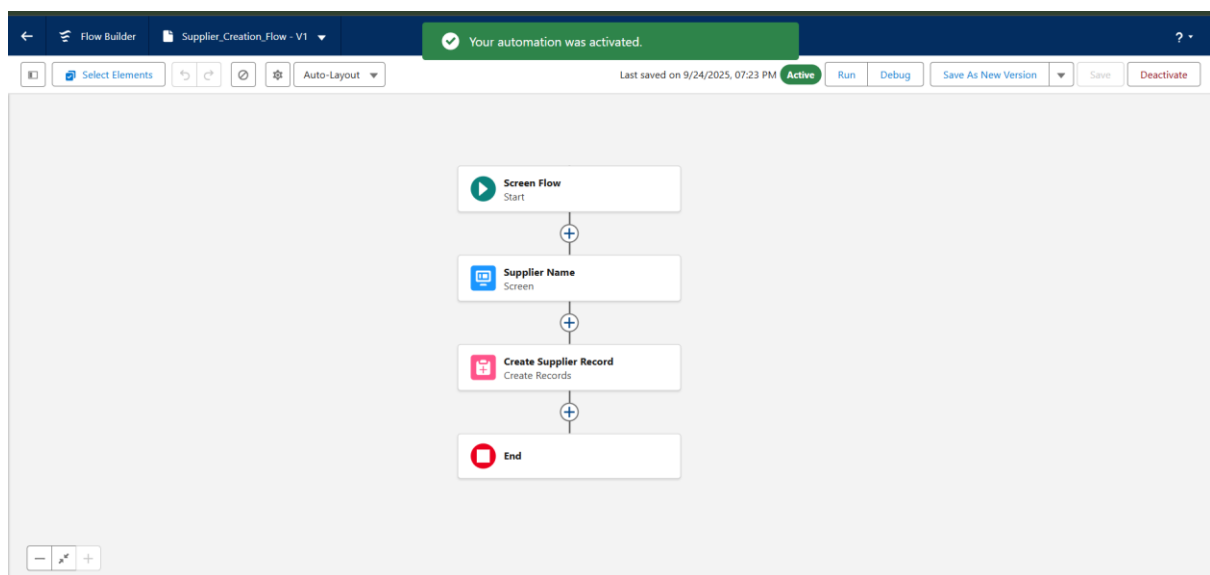
Action	Type	Description
	Record Lock	Lock the record from being edited

Approval Steps

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

Flow Builder:

1. Go to Setup → Flows → New Flow.
2. Select Flow Type: Screen Flow → Next.
3. Add Screen Element: Drag Screen → Label: Enter Supplier Details.
4. Add Input Fields:
 - Text: Supplier Name (Required)
 - Phone: Supplier Phone
 - Email: Supplier Email
5. Add Create Records Element:
 - Object: Supplier__c
 - Map screen inputs to object fields (Name, Phone, Email).
6. Connect Elements: Start → Screen → Create Records → End.
7. Save and Activate: Only active flows can run.



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.

The screenshot shows the 'Email Alerts' setup page in Salesforce. The header includes a 'SETUP' button and the 'Email Alerts' title. Below the header, there's a sub-header 'Email Alert' and a description: 'Email alert to notify Manager when medicine stock falls to or below reorder level.' There are links for 'Rules Using This Email Alert (0)', 'Approval Processes Using This Email Alert (0)', and 'Entitlement Processes Using This Email Alert (0)'. The main section is titled 'Email Alert Detail' and contains a table with the following information:

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: Vaibhav Chinchu		
Additional Emails			
Created By	Shreyash Babhulkar: 9/21/2025, 9:31 PM	Modified By	Shreyash Babhulkar: 9/21/2025, 9:31 PM

At the bottom of the table, there are 'Edit', 'Delete', and 'Clone' buttons.

Field Updates:

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

The screenshot shows the 'All Workflow Rules' page in Salesforce. The header includes a 'Help for this Page' link. Below the header, there's a section titled 'All Workflow Rules' with a description: '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. Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers.' There are links for 'Tell Me More' and 'Migrate your workflow rules to flows'. A 'Quick Tips' section on the right lists: 'Useful Sample Workflow Rule', 'Video Tutorial (English Only)', and 'Troubleshooting Workflow'. Below the description, there's a 'View: All Workflow Rules' dropdown and a 'Create New View' button. A table lists the workflow rules:

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

At the bottom of the table, there are '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', and 'All' links.

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.

SETUP

Tasks

Task

Check Medicine Expiry

Rules Using This Task (0) | Approval Processes Using This Task (0) | Entitlement Processes Using This Task (0)

Help for this Page

Workflow Task Detail

EditDeleteClone

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

EditDeleteClone

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

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		✓	✓ ▼