

# 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.”

<b>Validation Rules</b> <div>2 Items, Sorted by Rule Name</div> <div>New</div>				
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**

<div>New Rule</div>				
Action	Rule Name ↑	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	<a href="#">Low_Stock_Alert</a>		Medicine	✓
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	<a href="#">Set_Status_To_Approved</a>		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

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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	✓
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	<a href="#">Shreyash Babhulkar</a> 9/22/2025, 6:58 AM			Modified By	<a href="#">Shreyash Babhulkar</a> 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
<a>Show Actions</a>   <a>Edit</a>	Step 1	Step 1			<a href="#">User Vaibhav Chinche</a>	Final Rejection

## 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' icon and the text 'Email Alerts'. Below the header, the email alert is titled 'Email alert to notify Manager when medicine stock falls to or below reorder level.' and is associated with the 'Low Stock Alert Template'. The 'Email Alert Detail' section includes fields for 'Description', 'Unique Name' (Low\_Stock\_Alert), 'From Email Address' (Current User's email address), 'Recipients' (User: Vivek Tongle, User: Vaibhav Chinche), 'Additional Emails', 'Created By' (Shreyash Babhulkar, 9/21/2025, 9:31 PM), and 'Modified By' (Shreyash Babhulkar, 9/21/2025, 9:31 PM). Buttons for 'Edit', 'Delete', and 'Clone' are available for the alert and its details.

## 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 page title is 'All Workflow Rules'. Below the title, there is a message about the future of low-code automation and a link to 'Migrate your workflow rules to flows'. The page includes a 'Quick Tips' section with links to 'Useful Sample Workflow Rule', 'Video Tutorial (English Only)', and 'Troubleshooting Workflow'. The 'View' section shows 'All Workflow Rules' and a 'Create New View' button. The 'New Rule' button is also visible. The table below lists the workflow rules:

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Low_Stock_Alert		Medicine	✓
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	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.


**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

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

Edit

Delete

Clone


## Custom Notifications:


1.Setup → Notification Builder → Custom Notifications → New.

- Name: Low Stock Notification.

2.In Flow: Add Action → Send Custom Notification.

3.Recipient: Manager.


**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		✓	✓