Project Title: Smart Pharmacy Inventory Tracker

Phase 4: Process Automation (Admin)

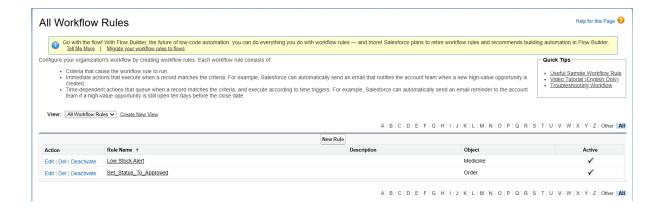
Validation Rules:

- 1. Navigate to Setup \rightarrow Object Manager \rightarrow Medicine \rightarrow Validation Rules \rightarrow New.
- 2. Create rule to prevent negative stock:
 - Rule Name: Quantity_Positive
 - Formula: Quantity_c < 0
 - Error Message: "Quantity cannot be negative."
- 3. Create rule to restrict expiry date:
 - Rule Name: ExpiryDate_Not_Past
 - Formula: Expiry Date c < 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** \rightarrow **Workflow Rules** \rightarrow **New Rule**.
- 2.Object: Medicine.
- 3. Rule Name: Low Stock Alert.
- 4. Criteria: Quantity $c \le Reorder Level c$.
- 5.Add Workflow Action → New Email Alert.
 - Template: "Low Stock Alert".
 - Recipient: Store Manager.
- 6.Activate rule.



Approval Process:

1.Go to Setup \rightarrow Approval Processes \rightarrow New Approval Process (Jump Start).

2.Object: Order.

3. Name: PO Approval.

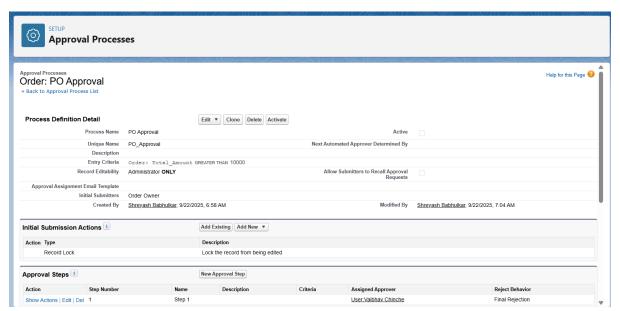
4.Criteria: Total_Amount_c > 10000.

5. Approver: Manager.

6. Final Actions:

• Approved → Update Status = Approved.

• Rejected → Update Status = Rejected.



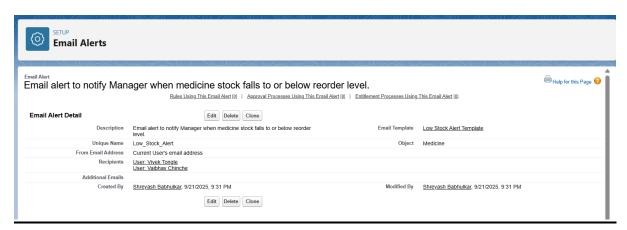
Flow Builder:

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 $c \le Reorder Level c$.
 - 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.

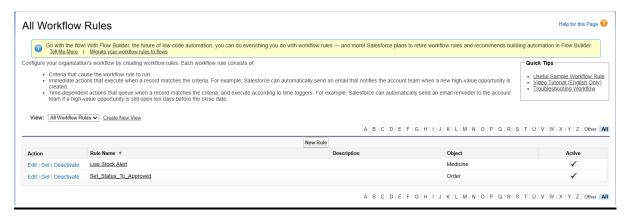
Email Alerts:

- 1.Setup \rightarrow Email Alerts \rightarrow New.
- 2. Object: Medicine.
- 3. Template: "Expiry Alert".
- 4. Recipient: Manager.
- 5.Add alert to Workflow Rule or Flow.



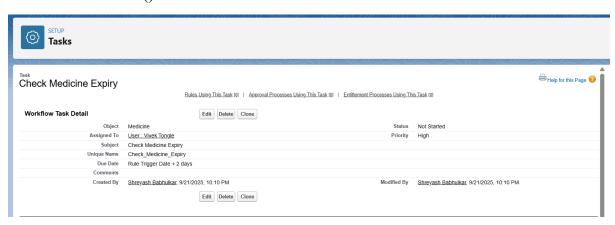
Field Updates:

- 1.Setup \rightarrow Workflow Rules \rightarrow Add Action \rightarrow Field Update.
- 2. Example: On Order Approval, update Status c = Approved.
- 3.Save.



Tasks:

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



Custom Notifications:

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

