

# Phase 4: Process Automation (Admin)

## 1. Validation Rules

Created 7 validation rules across all custom objects to maintain data integrity.

### Blood Donor Object

- **Last Donation Gap:** Enforces a minimum 90-day interval between donations for safety.
- **Blood Type Required:** Ensures donor blood type is specified for inventory matching.
- **Phone Number Required:** Ensures availability of contact info for emergencies and follow-ups.

The screenshot shows the Salesforce Setup interface for the 'Blood Donor' object. The 'Validation Rules' section is active, displaying a table with 3 items. The table columns are: RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The rules listed are 'Last\_Donation\_Gap', 'Phone\_Required', and 'Valid\_Blood\_Type'. Each rule is active and was modified by 'Jyotsna Sakinala' on 9/23/2025. The 'Last\_Donation\_Gap' rule has an error message: 'The last donation must be at least 90 days ago for new donation eligibility'. The 'Phone\_Required' rule has an error message: 'Phone Number is required for donor contact.'. The 'Valid\_Blood\_Type' rule has an error message: 'Blood Type must be selected.'.

| RULE NAME         | ERROR LOCATION     | ERROR MESSAGE   | ACTIVE | MODIFIED BY                           |
|-------------------|--------------------|---|--------|---------------------------------------|
| Last_Donation_Gap | Last Donation Date | The last donation must be at least 90 days ago for new donation eligibility | ✓      | Jyotsna Sakinala, 9/23/2025, 11:26 AM |
| Phone_Required    | Phone Number       | Phone Number is required for donor contact.                                 | ✓      | Jyotsna Sakinala, 9/23/2025, 11:28 AM |
| Valid_Blood_Type  | Blood Type         | Blood Type must be selected.  | ✓      | Jyotsna Sakinala, 9/23/2025, 11:27 AM |

### Blood Request Object

- **Units Required Positive:** Prevents zero or negative unit requests.
- **Required By Date Logic:** Ensures required by date is after request date to keep chronology consistent.

Recently Viewed | Blood Donor | Blood Request | Salesforce | Phase 6 — User Interface Development

orgfarm-1dad82a5f1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gl000002KTMT/ValidationRules/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Blood Request

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

#### Validation Rules

3 Items, Sorted by Rule Name

| RULE NAME                 | ERROR LOCATION   | ERROR MESSAGE                                    | ACTIVE | MODIFIED BY                           |
|---------------------------|------------------|--|--------|---------------------------------------|
| Priority_Required         | Priority         | Priority is required for all blood requests.     | ✓      | Jyotsna Sakinala, 9/23/2025, 11:32 AM |
| Required_By_After_Request | Required By Date | Required By Date must be after the Request Date. | ✓      | Jyotsna Sakinala, 9/23/2025, 11:31 AM |
| Units_Required_Positive   | Units Required   | Units Required must be greater than zero.        | ✓      | Jyotsna Sakinala, 9/23/2025, 11:31 AM |

Activate Windows  
Go to Settings to activate Windows.

## Blood Inventory Object

- **Non-Negative Units:** Disallows negative blood inventory counts.

Recently Viewed | Blood Donor | Blood Inventory | Salesforce | Phase 6 — User Interface Development

orgfarm-1dad82a5f1-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gl000002KUdV/ValidationRules/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Blood Inventory

Details

Fields & Relationships

Page Layouts

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Buttons, Links, and Actions

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#### Validation Rules

2 Items, Sorted by Rule Name

| RULE NAME                   | ERROR LOCATION  | ERROR MESSAGE                        | ACTIVE | MODIFIED BY                           |
|-----------------------------|-----------------|--------------------------------------|--------|---------------------------------------|
| Blood_Type_Required         | Blood Type      | Blood Type is required in inventory. | ✓      | Jyotsna Sakinala, 9/23/2025, 11:33 AM |
| Units_Available_NonNegative | Units Available | Units Available cannot be negative.  | ✓      | Jyotsna Sakinala, 9/23/2025, 11:33 AM |

Activate Windows  
Go to Settings to activate Windows.

https://orgfarm-1dad82a5f1-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01gl000002KUdV/RecordTypes/view

## Hospital Request Object

- **Positive Units Requested:** Ensures hospital requests specify valid quantities (greater than zero).

The screenshot shows the Salesforce Setup interface for the 'Hospital Request' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Validation Rules' and shows a list of 2 items, sorted by Rule Name. The table below lists the validation rules:

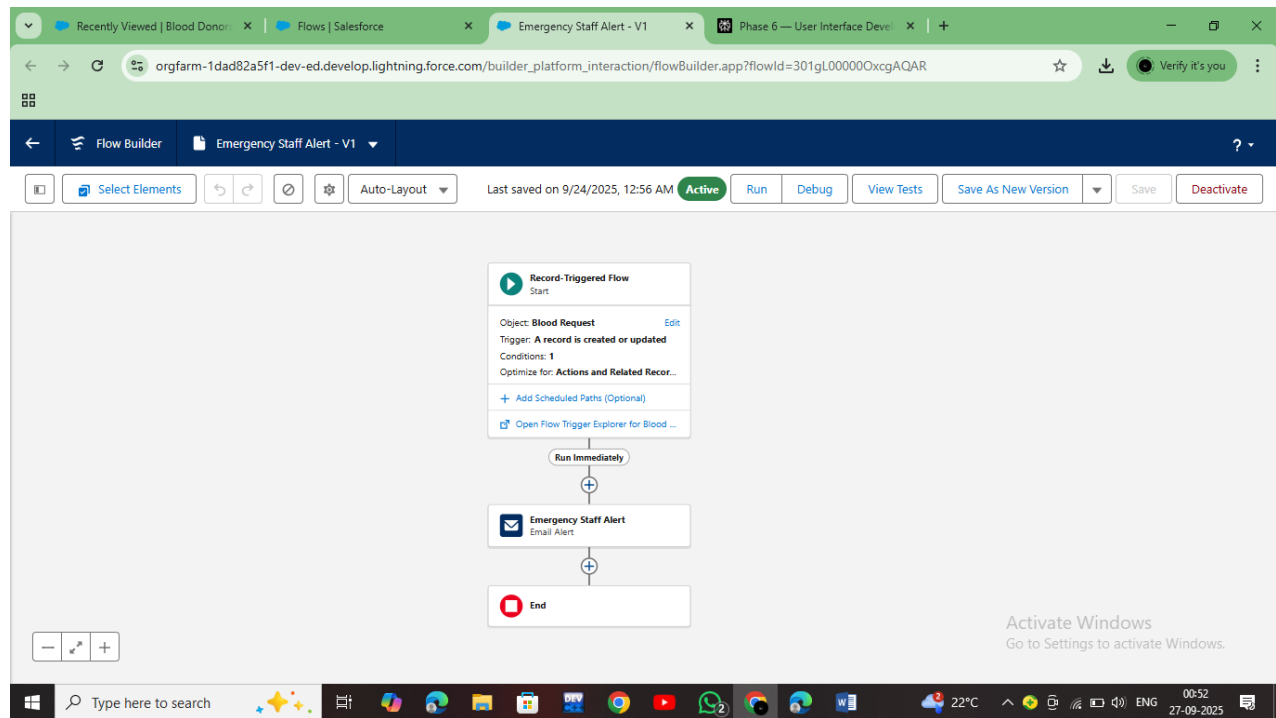
| RULE NAME                | ERROR LOCATION  | ERROR MESSAGE                                    | ACTIVE | MODIFIED BY                           |
|--------------------------|-----------------|--|--------|---------------------------------------|
| Units_Requested_Positive | Units Requested | Units Requested must be greater than zero        | ✓      | Jyotsna Sakinala, 9/23/2025, 11:35 AM |
| Urgency_Level_Required   | Urgency Level   | Urgency Level is required for hospital requests. | ✓      | Jyotsna Sakinala, 9/23/2025, 11:35 AM |

At the bottom right of the page, there is a message: 'Activate Windows Go to Settings to activate Windows.'

## 2. Flow Builder (Record-Triggered)

Automated **Emergency Blood Request Notification Flow** to expedite critical blood requests.

- **Object:** Blood Request
- **Trigger:** Record created/updated with Priority = "Emergency"
- **Action:** Email Alert sent to Blood Bank Staff role
- **Business Impact:** Enables sub-5-minute emergency response.



## Email Alert Details

- **Recipients:** Blood Bank Staff role members
- **Content:** Hospital Name, Blood Type Required, Units Required, Required By Date
- **Template:** Text for universal compatibility and quick delivery.

## 3. Approval Process

Large Hospital Request Approval for requests >10 units.

- **Entry Criteria:** Units Requested > 10
- **Approval Step:** Single-step approval by Admin role
- **Business Logic:** Ensures oversight on large-volume requests, smaller handled immediately.

## Approval Actions

- On Approval: Updates Status to "Approved"
- On Rejection: Updates Status to "Rejected"
- Maintains audit trails for high-value transactions.

#### 4. Field Updates

Automated status updates to maintain accurate request lifecycle tracking.

- **Set Status to Approved:** Triggered on final approval.
- **Set Status to Rejected:** Triggered on final rejection.
- **Effect:** Consistent data and clear audit trail.

#### 5. Tasks

Automated **Follow-up Task Creation Flow** after blood request fulfillment.

- **Object:** Blood Request
- **Trigger:** Status changes to "Fulfilled"
- **Action:** Task created for Blood Bank Staff
- **Task Details:** Subject "Follow up with hospital for delivery confirmation", due next business day.

#### Business Value

- Ensures 100% follow-up on deliveries.
- Creates accountability and tracks delivery confirmation.
- Supports operational excellence in hospital coordination.

#### 6. Email Alerts

Emergency Email Alert System configured for real-time communication.

- **Object:** Blood Request
- **Trigger Condition:** Priority = "Emergency"
- **Recipients:** Blood Bank Staff role members
- **Content:** Hospital details, blood type, units required, deadline
- **Delivery:** Instant notification reducing manual efforts.