

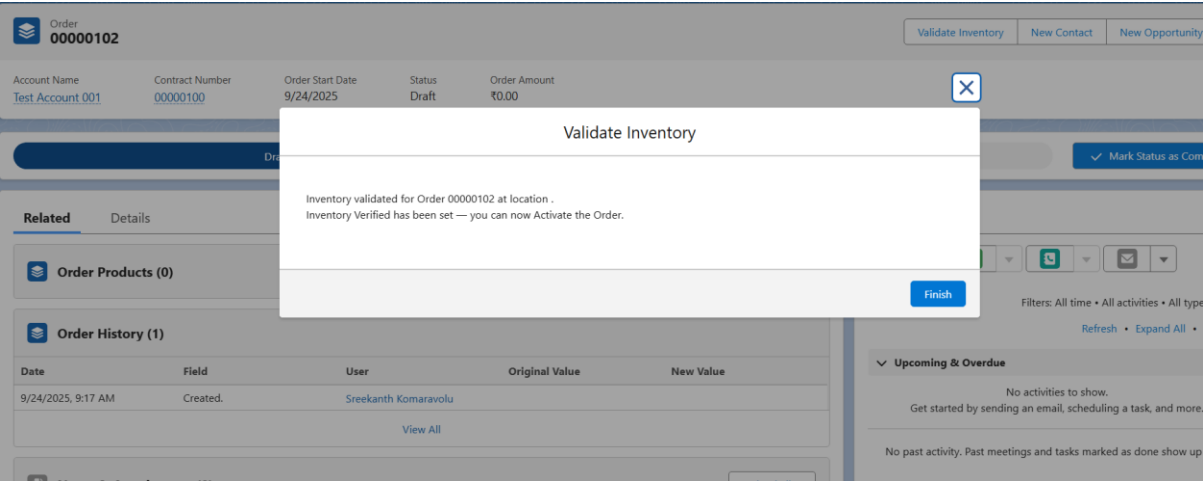
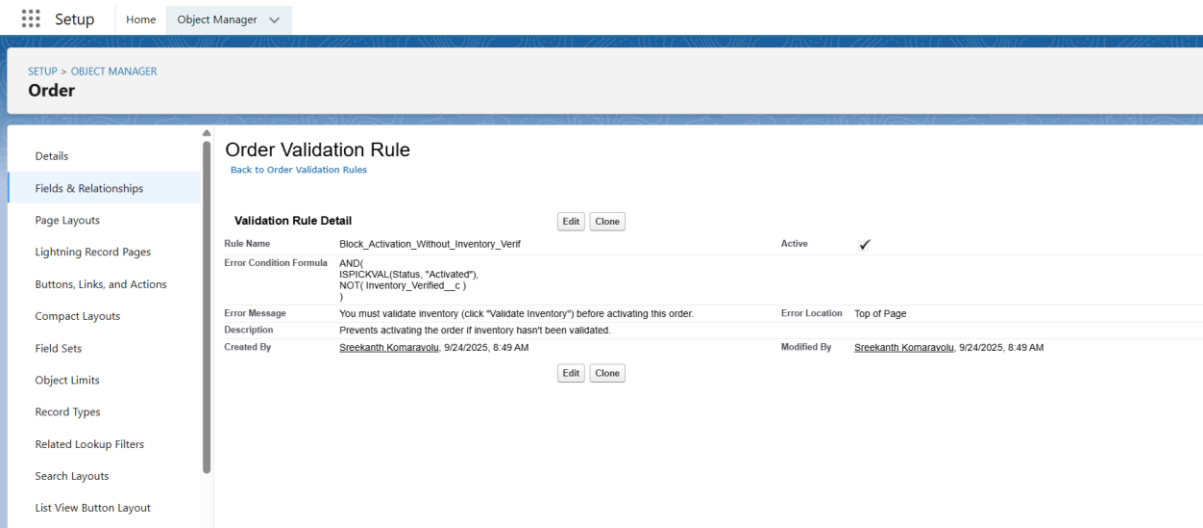
Phase 4: Process Automation (Admin)

In this phase, we automated critical business processes for the **SmartBasket** using Salesforce declarative tools to improve operational efficiency and ensure data integrity. We focused on leveraging modern automation tools like Flow Builder while skipping deprecated or non-essential features for this project's scope.

1. Validation Rules

We implemented a **Validation Rule** to enforce business logic and ensure data integrity.

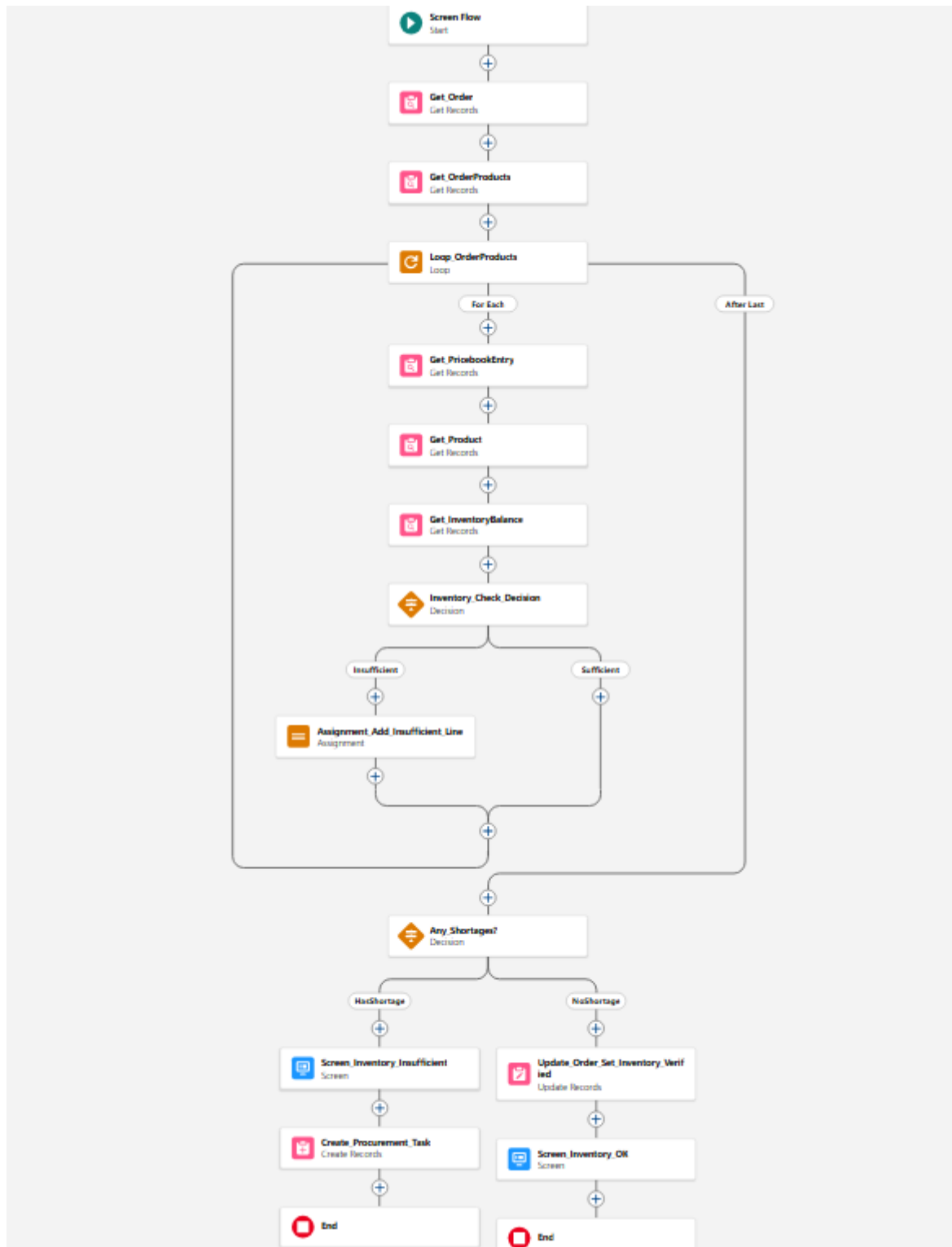
- **Rule Name:** Block Order Activation Without Inventory Verification
- **Description:** This rule ensures an Order cannot be set to "Activated" unless the Inventory_Verified__c checkbox is first checked.
- **Formula:** AND(ISPICKVAL(Status, "Activated"), NOT(Inventory_Verified__c))
- **Error Message:** "You must validate inventory (click "Validate Inventory") before activating this order."



2. Flow Builder

We used Flow Builder to create two distinct flows to automate key processes for inventory management.

Screen Flow: Validate Inventory



Screen Flow was built and added to the Order record as a Quick Action named "Validate Inventory".

- **User Action:** The user clicks the "Validate Inventory" button on the Order record page.
- **Flow Logic:**
 - The flow checks each Order Product against its corresponding Inventory Balance record for the selected Fulfillment Location.
 - **If stock is available**, it sets the Inventory_Verified__c field on the Order record to TRUE.
 - **If stock is insufficient**, the flow displays a screen listing the shortages and automatically creates a Task for the Order Owner to initiate procurement.
- **Outcome:** This flow prevents the activation of an order without proper inventory validation, ensuring better control over stock and order processing.

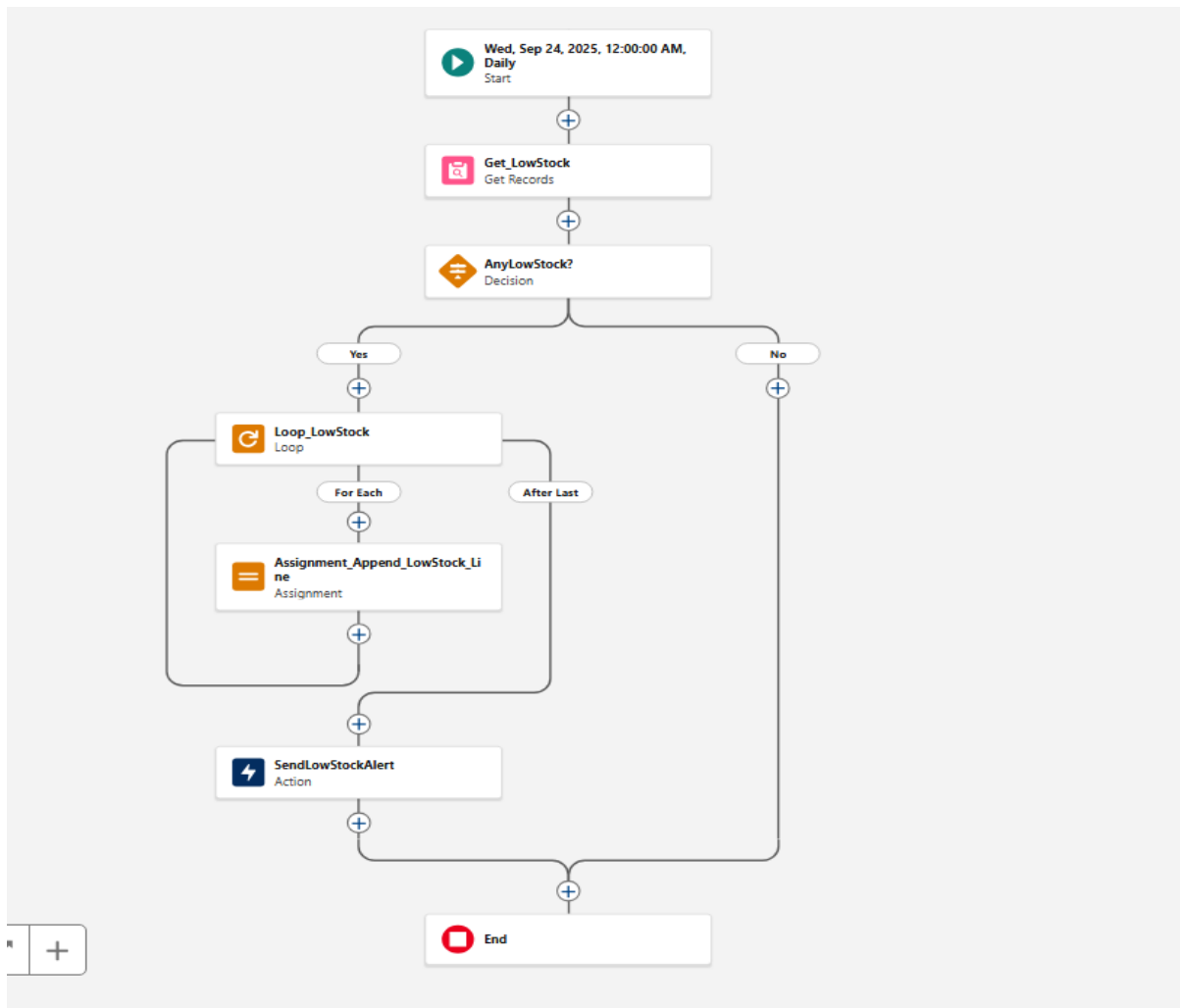
Scheduled Flow: Low Stock Alert

Scheduled Flow was built to run daily and proactively alert the inventory manager of low stock.

- **Purpose:** To proactively replenish stock before shortages affect customer orders.
- **Flow Logic:**
 - The flow checks all Inventory Balance records where the Available_to_Sell__c field is less than or equal to the Reorder_Level__c field.
 - If any low-stock items are found, the flow sends an

Email Alert with a detailed list of the shortages.

- **Outcome:** The system provides proactive alerts, which helps manage stock effectively without requiring manual checks.



3 Tasks & Email Alerts

These components were integrated directly into our Flows to automate communication and follow-up.

- **Tasks:** A Task is automatically created by the **Validate Inventory Screen Flow** when a stock shortage is detected. This notifies the Order Owner to address the issue.
- **Email Alerts:** An email alert is automatically sent by the **Low Stock Alert Scheduled Flow** to notify the inventory manager or admin about low-stock products.

4 Optional and Excluded Components

The following components were considered but deemed unnecessary for the scope of this project, as their functionality was either redundant or could be handled more effectively within Flow Builder.

- **Workflow Rules & Process Builder:** These were not used as Flow is the recommended tool for all new automation.

- **Approval Process:** Not needed, as the project's business case does not require a formal approval process for orders.
- **Custom Notifications:** While a useful tool, they were not essential since our solution already includes email alerts and task creation for notifications.