

Phase 4- Process Automation

This comprehensive overview details the specific automation steps implemented for Phase 4 of the Pharmacy Inventory System project, showcasing advanced workflow optimization and process efficiency improvements.

Validation Rules Implementation

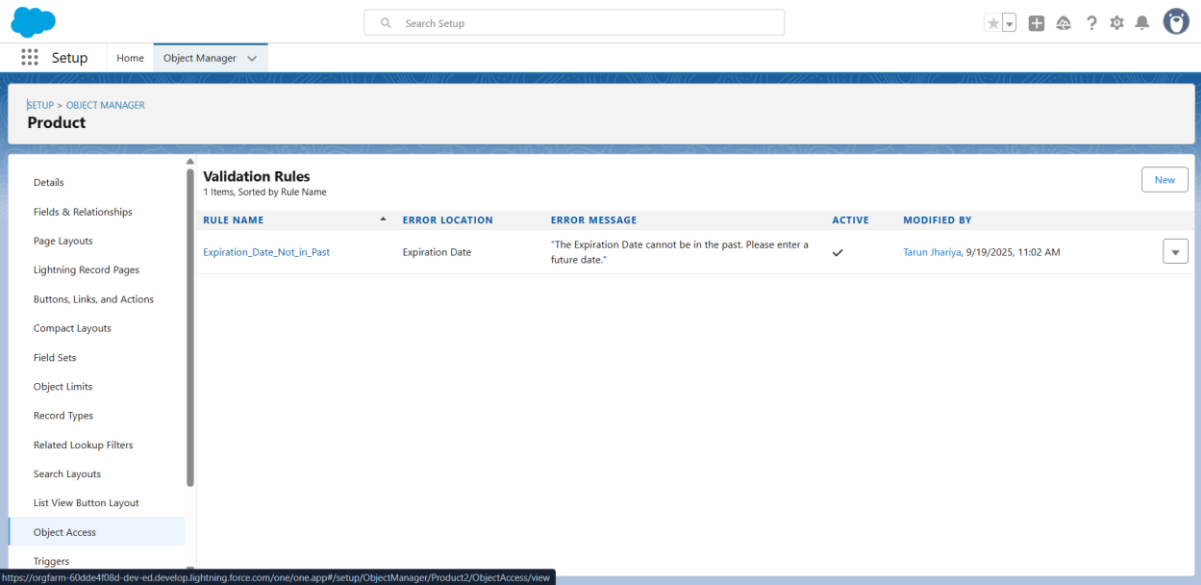
Rule Configuration

Rule Name: Expiration_Date_Not_in_Past

Object: Product

Navigation Path: Setup > Object Manager > Product > Validation Rules

A sophisticated formula utilizing the TODAY() function was implemented to prevent users from saving prescriptions with future dates, ensuring historical data accuracy and maintaining system integrity.



Modern Automation Strategy

Legacy Tools Avoided

Workflow Rules and Process Builder were intentionally bypassed in favor of modern automation solutions.

Flow Builder Priority

All automation was built using Flow Builder as the preferred modern best practice for enhanced efficiency and maintainability.

High-Cost Medication Approval Process

Field Creation

Added Price__c (Currency) field to the Prescription object as a prerequisite for the approval process.

Process Configuration

Created High-Cost Medication Approval using Jump Start Wizard with entry criteria set for prescriptions exceeding \$500.

Approver Assignment

Configured automatic assignment to user's Manager based on Role Hierarchy for streamlined approval workflow.

Deployment

Activated process with automatic addition of "Submit for Approval" button and "Approval History" related list to page layout.

Dispense Medication Wizard Flow

Patient Details Screen

Built with Lookup component to efficiently find existing Contact records in the system database.

Prescription Details Screen

Configured with required Lookup components for Product (Medication) and User (Pharmacist), plus Date/Time component.

Record Creation

Create Records element generates single Prescription record with field values mapped from screen components.

Inventory Update

Update Records element decrements Quantity_on_Hand__c field on Product record by dispensed quantity.

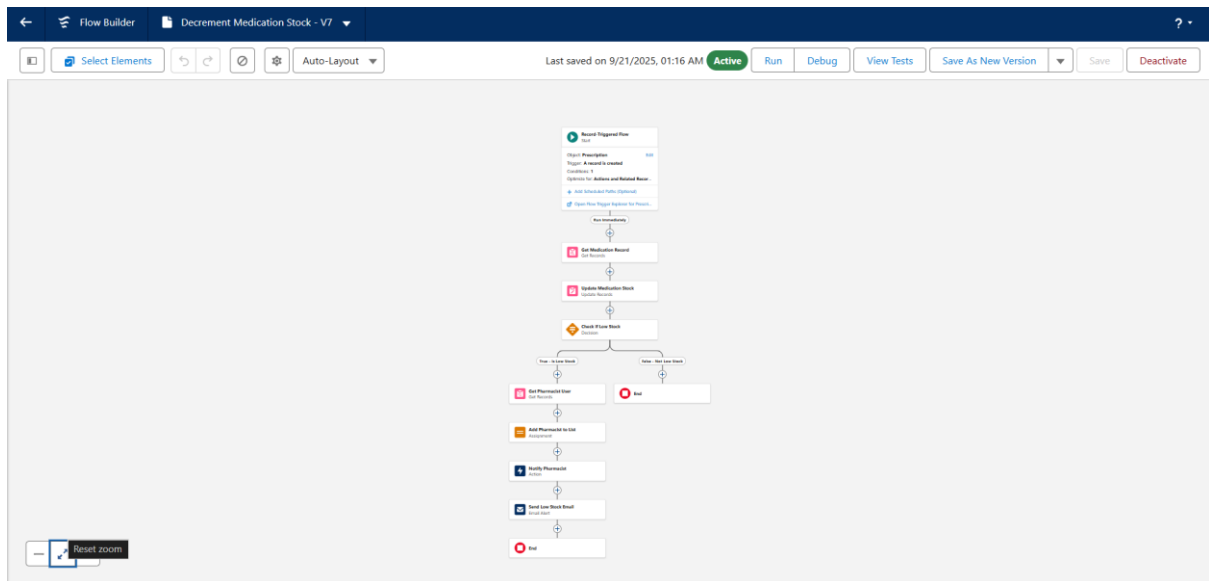
Custom Button Integration

Dispense Medication Button

A custom List Button was strategically created to provide seamless access to the medication dispensing workflow.

- **Button Name:** Dispense Medication
- **Content Source:** /flow/Dispense_Medication_Wizard
- **Integration:** Added to Prescription page layout
- **Functionality:** Direct access to dispensing workflow

This integration ensures pharmacists can quickly initiate the medication dispensing process directly from the prescription interface.



Scheduled Low-Stock Inventory Alert

9:00 AM Daily Schedule

Automated flow runs every morning to monitor inventory levels across all medications.

Inventory Scan

System retrieves all Product records where Quantity_on_Hand__c is less than 50 units.

Alert Generation

Triggers dual-action response for each low-stock medication identified.

Automated Alert Actions

Email Notification

Sends Low-Stock Email Alert to pharmacy manager using custom email template for immediate awareness of inventory shortages.

Task Creation

Creates actionable Task with subject "Order more [Medication Name]" assigned directly to the manager for follow-up.

Email Alert System Configuration

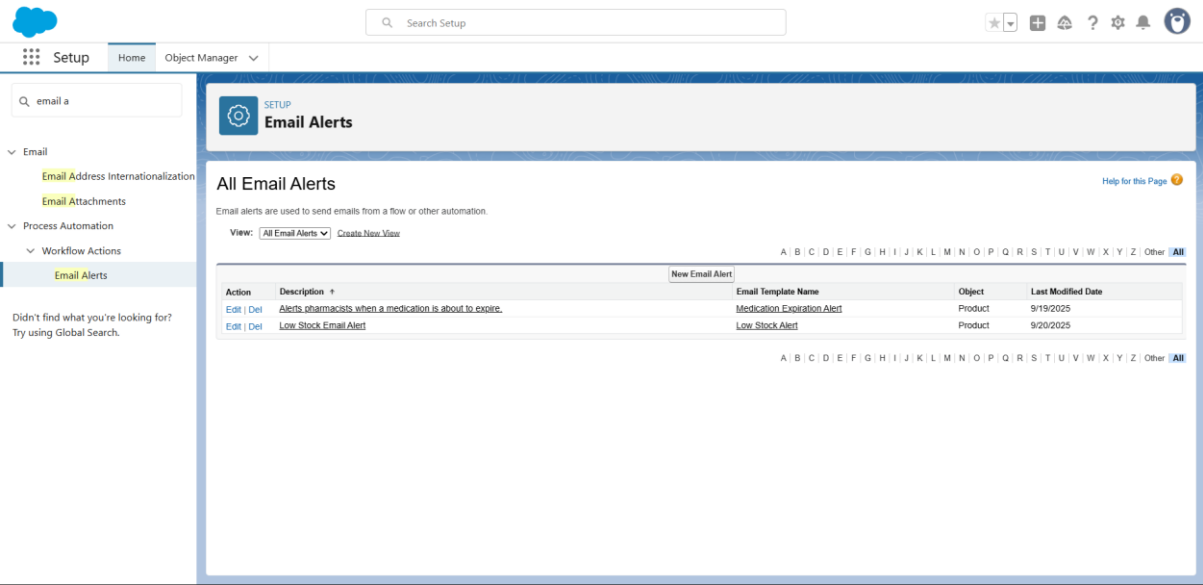
Send Low-Stock Email Alert

The sophisticated email alert system was meticulously configured to ensure timely communication of inventory shortages.

- **Template:** Custom email template design

- **Recipient:** Pharmacy manager
- **Trigger:** Called by Low-Stock Inventory Alert flow
- **Content:** Detailed medication shortage information

This automated communication ensures no critical inventory shortages go unnoticed.



Field Updates & Task Management

Inventory Field Updates

Critical field update action integrated within the Dispense Medication Wizard flow automatically decrements the Quantity_on_Hand__c field on related Product records, maintaining real-time inventory accuracy and preventing stock discrepancies.

Task Automation

The Low-Stock Inventory Alert flow creates structured Tasks for the pharmacy manager, serving as persistent reminders to reorder medications and ensuring continuous inventory management without manual oversight.

This comprehensive automation framework ensures seamless pharmacy operations through intelligent process optimization, real-time inventory tracking, and proactive alert systems that maintain optimal medication availability.