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.

SETUP > OBJECT MANAGER

Product

Details	
Fields & Relationships	
Page Layouts	
Lightning Record Pages	
Buttons, Links, and Actions	
Compact Layouts	
Field Sets	
Object Limits	
Record Types	
Related Lookup Filters	
Search Layouts	
List View Button Layout	
Object Access	
Triggers	

Validation Rules
1 Items, Sorted by Rule Name

New

RULE NAME ▲	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Expiration_Date_Not_in_Past	Expiration Date	"The Expiration Date cannot be in the past. Please enter a future date."	✓	Tarun Jhariya, 9/19/2025, 11:02 AM

https://orgfarm-60dde4f08d-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/Product2/ObjectAccess/view

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 Total_Cost__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

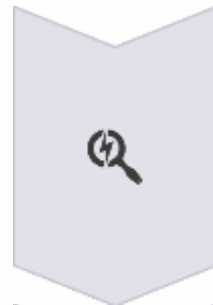Activated process with automatic addition of "Submit for Approval" button and "Approval History" related list to page layout.
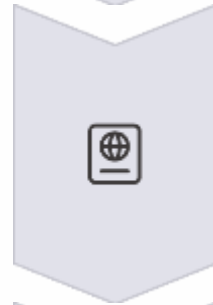
Dispense Medication Wizard Flow

Patient Details Screen

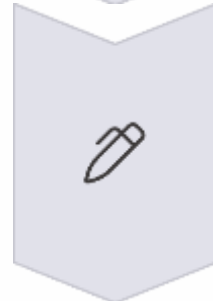Built with Lookup component to efficiently find existing Contact records in the system database.

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.
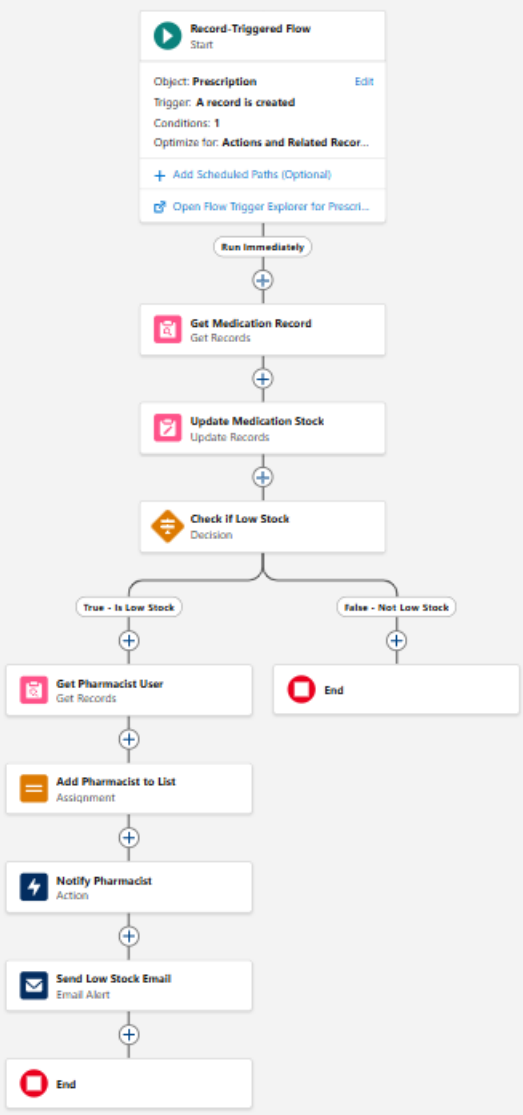
Custom Button Integration

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/Decrement Medication stock

- **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.

Select Elements

Auto-Layout

Last saved on 9/21/2025, 01:16 AM Active Run Debug View Tests Save As New Version Save Deactivate

Record-Triggered Flow
Start

Object: **Prescription**   Edit
Trigger: **A record is created**
Conditions: **1**
Optimize for: **Actions and Related Recor...**

+ Add Scheduled Paths (Optional)

↗ Open Flow Trigger Explorer for Prescri...

Run Immediately

Get Medication Record
Get Records

Update Medication Stock
Update Records

Check if Low Stock
Decision

True - Is Low Stock   False - Not Low Stock

Get Pharmacist User   ⬤ End
Get Records

Add Pharmacist to List
Assignment

Notify Pharmacist
Action

Send Low Stock Email
Email Alert

⬤ End

Reset zoom

Scheduled Low-Stock Inventory Alert

1 9:00 AM Daily Schedule

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

2 Inventory Scan

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

3 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:** Pharmacist

- **Trigger:** Called by Low-Stock Inventory Alert flow

- **Content:** Detailed medication shortage information

This automated communication ensures no critical inventory shortages go unnoticed.

SETUP
Email Alerts

All Email Alerts

Email alerts are used to send emails from a flow or other automation.

View: All Email Alerts | 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**

New Email Alert

Action	Description ↑	Email Template Name	Object	Last Modified Date
Edit | Del	Alerts pharmacists when a medication is about to expire.	Medication Expiration Alert	Product	9/19/2025
Edit | Del	Low Stock Email Alert	Low Stock Alert	Product	9/20/2025

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**

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.