Phase 4: Process Automation

1. Introduction:

This phase focused on automating key processes within the SAHAYA system using Salesforce's powerful automation tools. The goal was to reduce manual effort, prevent errors, and ensure timely actions and notifications during a disaster response, directly addressing the coordination and visibility challenges identified in Phase 1.

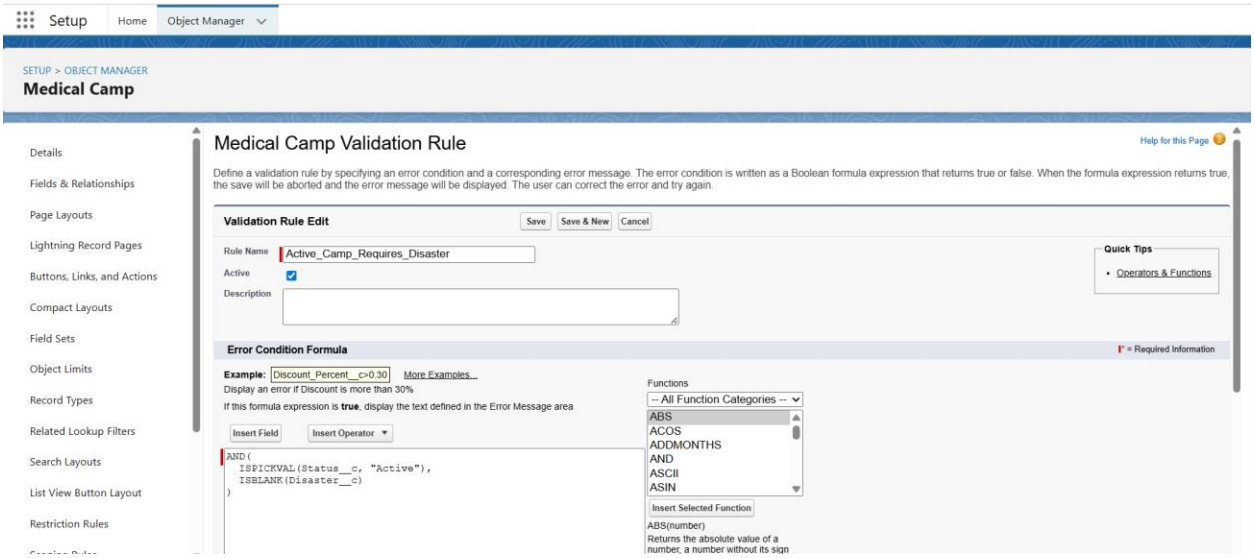
2. Objectives:

- Ensure data accuracy with Validation Rules.
- Automate multi-step processes using Process Builder.
- Implement a formal Approval Process for critical decisions.
- Build dynamic business logic with Flow Builder.
- Notify stakeholders automatically using Email Alerts.

3. Configuration Steps :

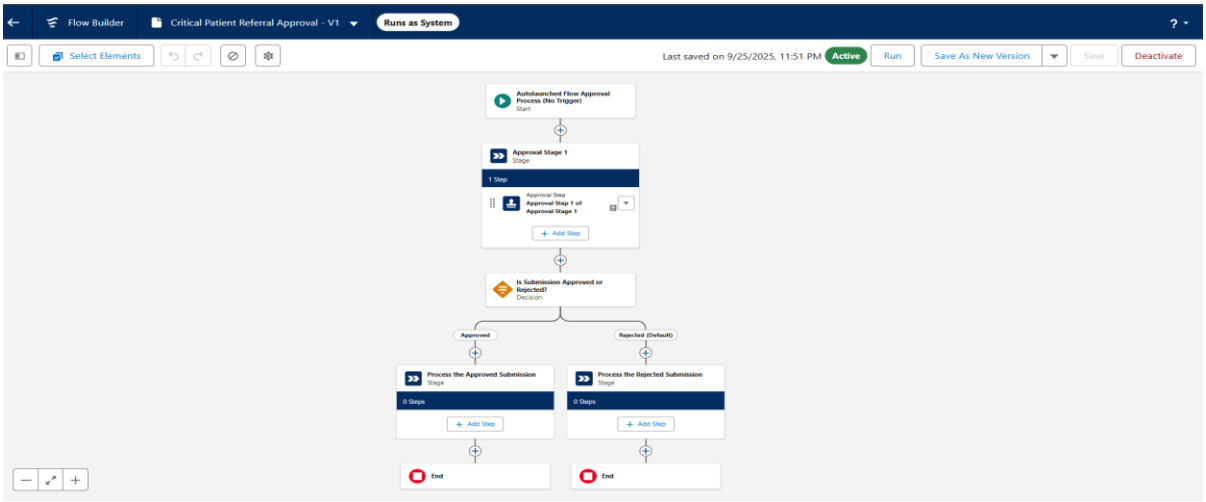
Step 1 — Validation Rule

- A validation rule was implemented to maintain logical data integrity.
- Object: Medical_Camp__c
- Rule Name: Active_Camp_Requires_Disaster
- Error Condition: Prevents a Medical Camp from being set to "Active" status if it is not linked to a Disaster record.
- Formula: text
  AND(
  ISPICKVAL(Status__c, "Active"),
  ISBLANK(Disaster__c)
)
  Error Message: "An Active Medical Camp must be linked to a Disaster."



Step 2 — Approval Process

- An approval process was created to manage the escalation of a patient referral to a hospital.
- Process Name: Critical Patient Referral Approval
- Object: Patient__c
- Entry Criteria: Status equals "Referred".
- Approver: The Disaster Manager user.
- Final Approval Action: Updates the Patient Status to "Transferred".



Step 3 — Flow Builder

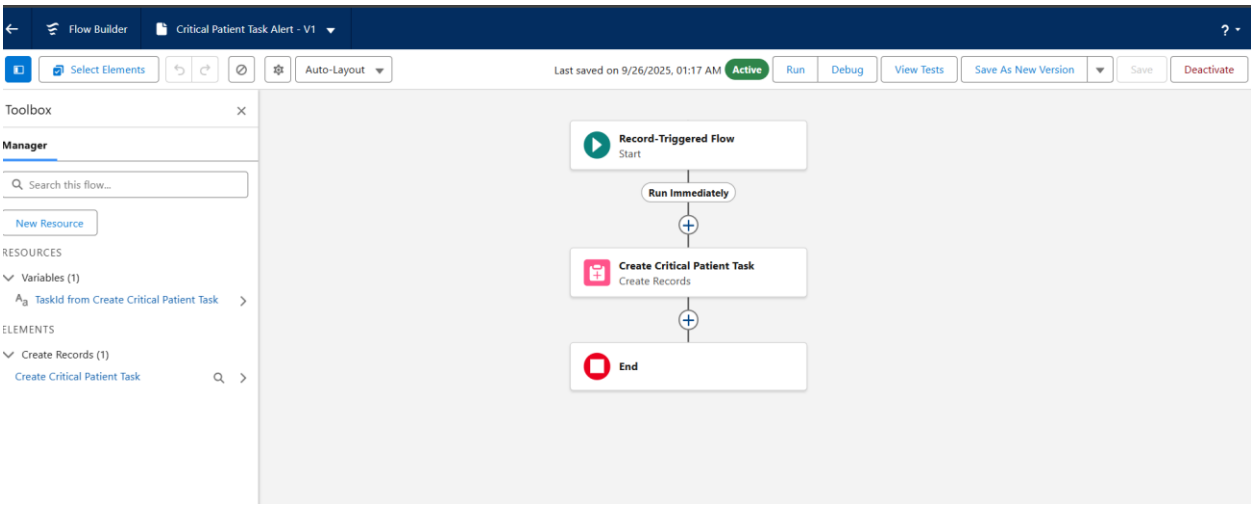
Two record-triggered flows were built to automate critical tasks.

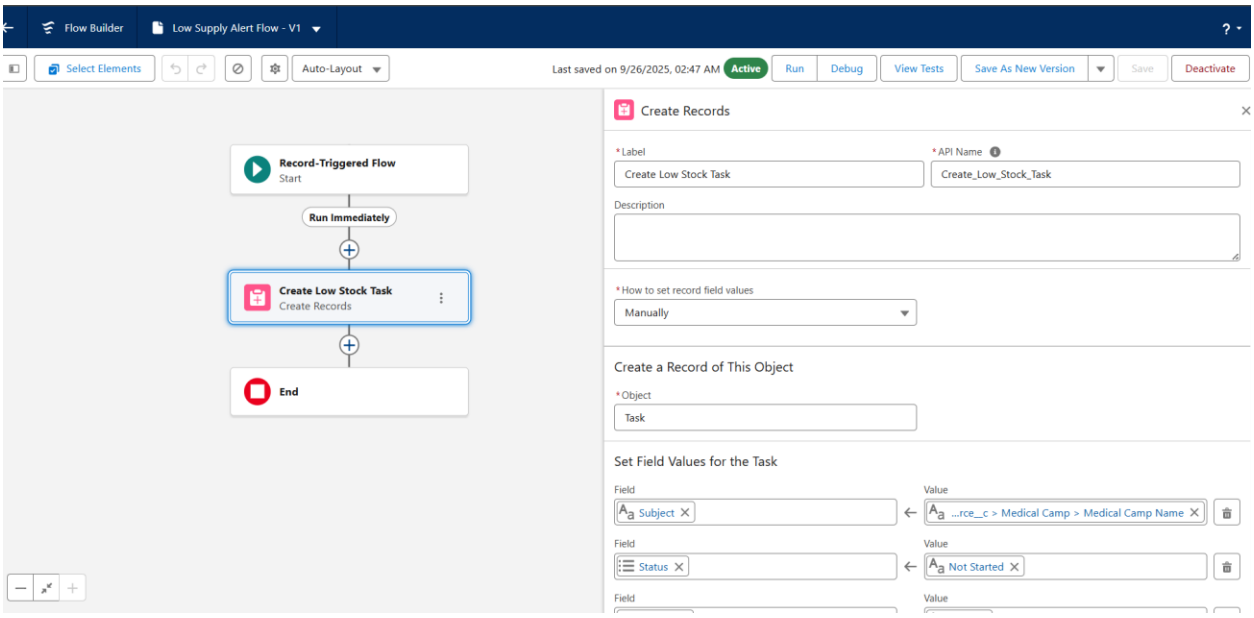
Flow 1: Critical Patient Task Alert

- Object: Patient__c
- Trigger: When a record is created or updated and Condition is set to "Critical".
- Action: Automatically creates a high-priority Task for the Disaster Manager.

Flow 2: Low Supply Alert Flow

- Object: Resource__c (a new custom object for tracking inventory)
- Trigger: When Quantity Available falls below the Minimum Threshold.
- Action: Creates a high-priority Task to alert the manager of low stock.

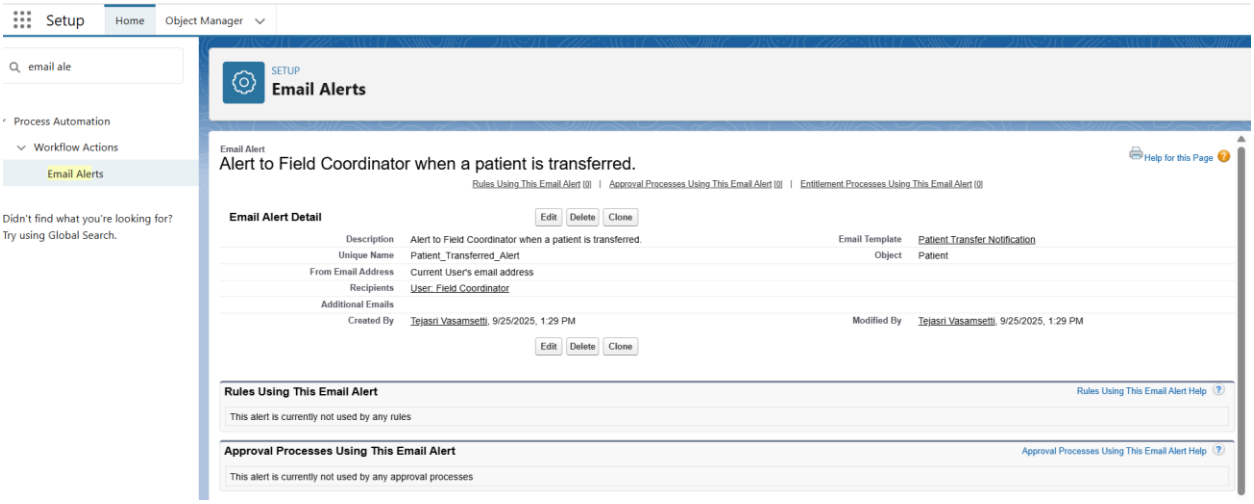




Step 4 — Email Alert

A reusable email alert was created for notifications.

- Alert Name: Patient_Transferred_Alert
- Object: Patient__c
- Email Template: Patient Transfer Notification
- Recipient: Field Coordinator user.



4. Conclusion :

The automations implemented in Phase 4 form the central nervous system of the SAHAYA application. They ensure that critical events—like a patient's condition deteriorating or supplies running low—trigger immediate, predefined actions and notifications. This creates a proactive, efficient, and transparent disaster response operation, moving significantly closer to the goal of saving more lives through technology.