

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."

Setup Home Object Manager

SETUP > OBJECT MANAGER
Medical Camp

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
Restriction Rules

Medical Camp Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit Save Save & New Cancel

Rule Name **Active_Camp_Requires_Disaster**

Active ☒

Description

Error Condition Formula * = Required Information

Example: `Discount_Percent__c > 0.30` [More Examples...](#)
Display an error if Discount is more than 30%
If this formula expression is **true**, display the text defined in the Error Message area

Insert Field Insert Operator

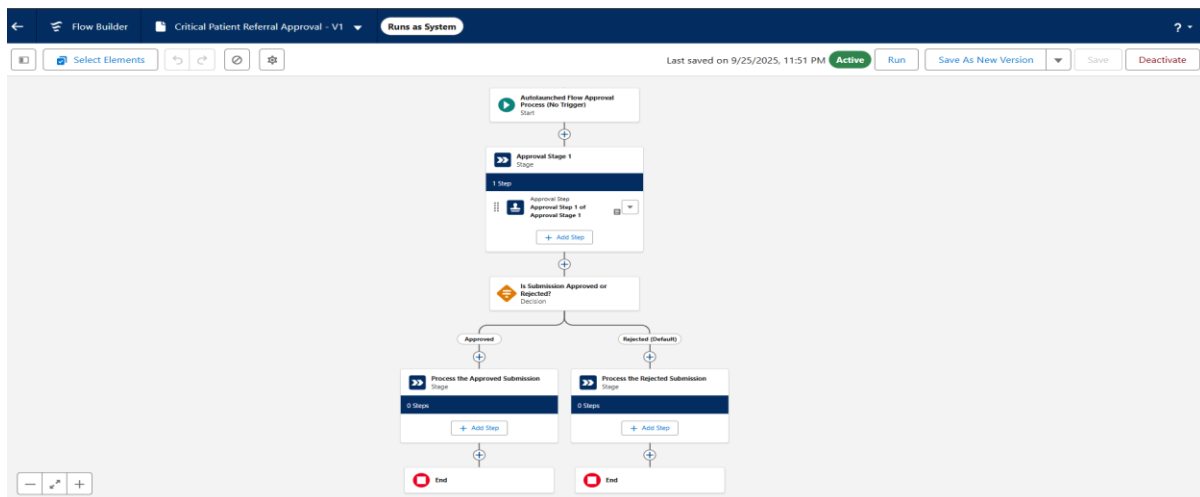
`AND (ISPICKVAL (Status__c, "Active"), ISBLANK (Disaster__c)`

Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign

Quick Tips
• Operators & Functions

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

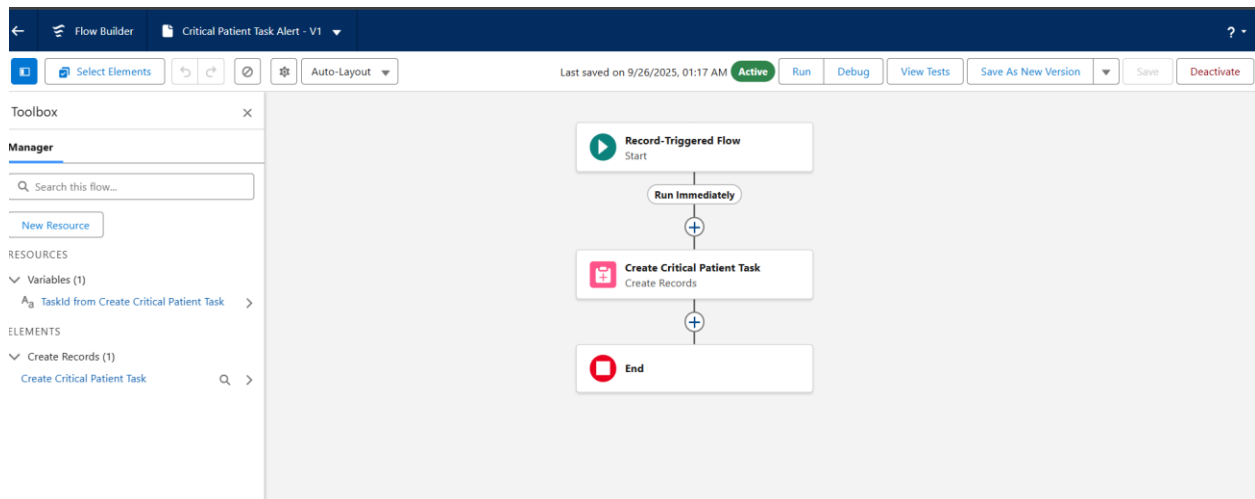
Two record-triggered flows were built to automate critical tasks.

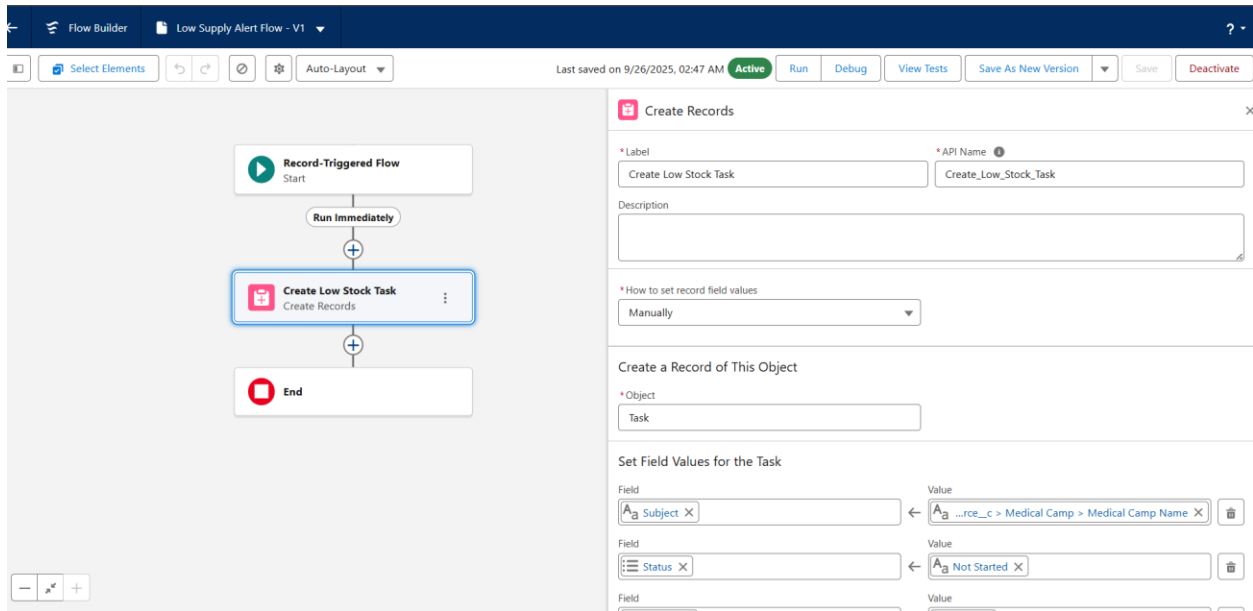
Flow 1: Critical Patient Task Alert

- 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.

The screenshot shows the 'Setup Email Alerts' page. The main content area displays the details of an email alert:

- Email Alert:** Alert to Field Coordinator when a patient is transferred.
- Email Alert Detail:**
 - Description: Alert to Field Coordinator when a patient is transferred.
 - Unique Name: Patient_Transferred_Alert
 - From Email Address: Current User's email address
 - Recipients: User Field Coordinator
 - Additional Emails: (Empty)
 - Created By: Tejasi Vasamsetti, 9/25/2025, 1:29 PM
 - Modified By: Tejasi Vasamsetti, 9/25/2025, 1:29 PM
- Rules Using This Email Alert:** This alert is currently not used by any rules.
- Approval Processes Using This Email Alert:** This alert is currently not used by any approval processes.

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.