

Project Title : “ Inventory & Order Tracking Dashboard “

Phase 4: Process Automation

1. Apex Trigger – Update Stock Quantity

Whenever an Order Item is created, updated, or deleted, the system should automatically update the Product’s Stock Quantity.

- **Example:**

If a Laptop has Stock = 10 and a new Order Item is created with Quantity = 2, the Stock should reduce to 8.

If the Order Item is deleted, the Stock should increase back.

★ Implementation:

Create an Apex Trigger on Order_Item__c.

Use a Handler Class (OrderItemHandler.cls) to write clean logic.

2. Flow – Auto-Populate Order Date

Instead of requiring users to enter the Order Date, we can set it automatically when a new Order is created.

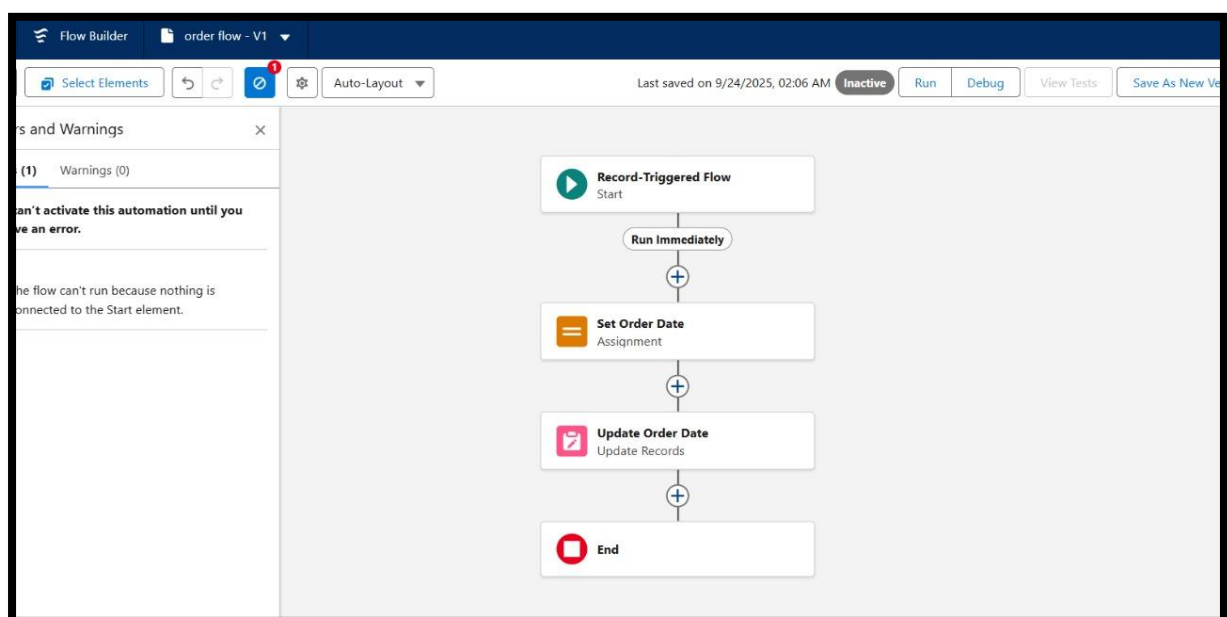
★ Implementation:

Setup → Flows → Record-Triggered Flow.

Object: Order__c.

Trigger: When record is created.

Action: Set field Order_Date__c = TODAY().



3. Validation Rules

Validation Rules ensure data quality.

Order Item Validation Rule

[Back to Order Item](#)

Validation Rule Detail

EditClone

Rule Name	Validate_Quantity	Active	<input checked="" type="checkbox"/>
Error Condition Formula	Quantity__c <= 0		
Error Message	Quantity must be greater than 0	Error Location	Currency
Description			
Created By	T N KUSHAL, 9/23/2025, 1:47 PM	Modified By	T N KUSHAL, 9/23/2025, 1:47 PM

EditClone

4. Approval Process

For real-world scenarios, orders above a certain value may require approval.

- **Example:**

If Total Order Value > ₹1,00,000, send the Order for approval by a Manager.

✦ **Implementation:**

Setup → Approval Processes → Create new for Order__c.

Entry Criteria: Total_Value__c > 100000.

Approver: Role = Manager.

SETUP

Approval Processes

Approval Processes

Order Item: High Value Order Approval

[Back to Approval Process List](#)

Process Definition Detail

EditCloneDeleteActivate

Process Name	High Value Order Approval	Active	<input type="checkbox"/>
Unique Name	High_Value_Order_Approval	Next Automated Approver Determined By	Manager of Record Submitter
Description			
Entry Criteria	Order Item: Total Price GREATER THAN "INR 100,000"		
Record Editability	Administrator ONLY	Allow Submitters to Recall Approval Requests	<input type="checkbox"/>
Approval Assignment Email Template			
Initial Submitters	Order Item Owner		
Created By	T N KUSHAL, 9/23/2025, 1:18 PM	Modified By	T N KUSHAL, 9/23/2025, 1:18 PM

Initial Submission Actions

Add ExistingAdd New

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps

New Approval Step

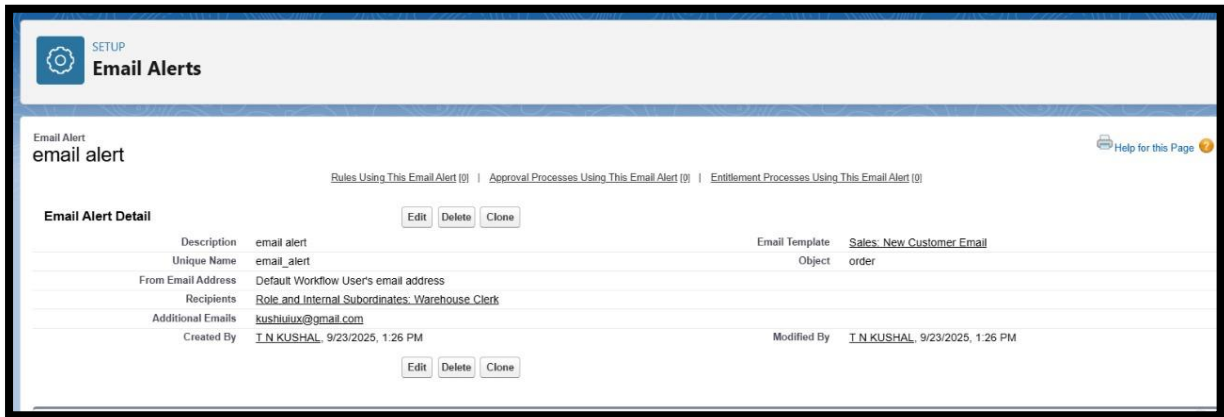
Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
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5. Notifications & Alerts

To keep users informed:

Create an Email Alert when an Order is Delivered.

Use Chatter Post Action to notify the warehouse team when stock falls below 5



The screenshot shows the 'Email Alerts' setup page in Salesforce. The page title is 'Email Alerts' with a 'SETUP' icon. Below the title, there's a breadcrumb trail: 'Email Alert' > 'email alert'. To the right of the breadcrumb, there are links for 'Rules Using This Email Alert (0)', 'Approval Processes Using This Email Alert (0)', and 'Entitlement Processes Using This Email Alert (0)'. A 'Help for this Page' link is also present. The main section is titled 'Email Alert Detail' and contains a table with the following fields:

Description	email alert	Email Template	Sales: New Customer Email
Unique Name	email_alert	Object	order
From Email Address	Default Workflow User's email address		
Recipients	Role and Internal Subordinates: Warehouse Clerk		
Additional Emails	kushiuv@gmail.com		
Created By	T N KUSHAL 9/23/2025, 1:26 PM		Modified By T N KUSHAL 9/23/2025, 1:26 PM

At the bottom of the table, there are 'Edit', 'Delete', and 'Clone' buttons.

Outcome of Phase 4

At the end of this phase:

Stock levels update automatically via Apex Trigger.

Order Date is set automatically using Flow.

Validation Rules ensure correct data entry.

Approvals and alerts keep the process controlled.