

Project Design Phase

Proposed Solution

Team ID	NM2025TMID04457
Project Name	Medical Inventory Management
Date	1 NOV 2025

Salesforce Account Setup

Parameter	Details
Module Summary	Created Developer Salesforce Account & Activated it
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

salesforce

Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

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✔ Harmonize your data with Data Cloud

✔ Ground Agentforce with structured and unstructured data

✔ Integrate with anything using APIs

Steps

1 Select Type

Agentforce

Customer Support

Sign up for your Developer Edition

A free Salesforce Platform environment with Agentforce and Data Cloud

First name

Femila

Last name

Murugan

Job title

developer

Work email

chinna33@gmail.com

Company

nadar saraswathi coll

Country/Region

India

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud Infrastructure.

☒

I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

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Finance headline
India reported ...

Search

ENG

IN

12:08:35
01-11-2025

Object Creation

Parameter	Details
Module Summary	Created Product and other required objects for inventory management
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

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

Restriction Rules

PRODUCT IDExample: Account Name

Data TypeTextWarning: if you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object.

☒ Allow Sharing

☒ Allow Bulk API Access

☒ Allow Streaming API Access

Deployment Status

☐ In Development

☒ Deployed

What is this?

Search Status

When this setting is enabled, your users can find records of this object type when they search.

☒ Allow Search

Hot days ahead
32°C

Search

ENG
IN

12:23:17
01-11-2025

Tab Creation

Parameter	Details
Module Summary	Created tabs for all custom objects including Product
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

orgfarm-3a1418c0f7-dev-ed.develop.my.salesforce-setup.com/lightning/setup/CustomTabs/home

Search Setup

SetupHomeObject Manager

tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

SETUP

Tabs

Custom Object Tabs

NewWhat Is This?

Action	Label	Tab Style	Description
Edit Del	Inventory Transactions	Stethoscope	
Edit Del	Order Items	Stethoscope	
Edit Del	Products	Stethoscope	
Edit Del	Purchase Orders	Stethoscope	
Edit Del	Suppliers	Stethoscope	

Web Tabs

NewWhat Is This?

No Web Tabs have been defined

Visualforce Tabs

NewWhat Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

NewWhat Is This?

Action	Label	Tab Style	Description
Edit Del	Get Started with Agentforce	Heart	
Edit Del	Get Started with Data Cloud	Map	

Upcoming Earnings

Search

ENG IN

12:28:10 01-11-2025

Lightning App Creation

Parameter	Details
Module Summary	Developed Lightning App for Medical Inventory Management
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

Setup

Home

Object Manager

Search Setup

Lightning Experience App Manager

New Lightning App

New External Client App

28 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name	Developer Name	Description	Last Modified	App Type	Visible	
11	Developer Edition	Developer_Edition	Welcome to your Developer Edition Org.	10/22/2025, 11:23 A...	Lightning (Managed)	✔	
12	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	10/22/2025, 11:01 A...	Lightning	✔	
13	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	10/22/2025, 11:01 A...	Lightning	✔	
14	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	10/22/2025, 11:01 A...	Classic	✔	
15	Medical Inventory Management	Medical_Inventory_Manageme...		10/28/2025, 9:49 PM	Lightning	✔	
16	My Service Journey	MSJApp	Discover new customer service capabilities.	10/22/2025, 11:01 A...	Lightning	✔	
17	Platform	Platform	The fundamental Lightning Platform	10/22/2025, 11:01 A...	Classic		
18	Queue Management	QueueManagement	Create and manage queues for your business.	10/22/2025, 11:01 A...	Lightning	✔	
19	Sales	Sales	The world's most popular sales force automation (SFA) soluti...	10/22/2025, 11:01 A...	Classic		
20	Sales	LightningSales	Manage your sales process with accounts, leads, opportuniti...	10/22/2025, 11:01 A...	Lightning	✔	
21	Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience.	10/22/2025, 11:01 A...	Lightning	✔	
22	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple rec...	10/22/2025, 11:01 A...	Lightning	✔	
23	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and...	10/22/2025, 11:01 A...	Classic		

Trending videos

A Knight of the...

Search

ENG IN

12:31:25 01-11-2025

Field Creation (13 Fields)

Parameter	Details
Module Summary	Created fields like Text, Text Area, Number, Currency, Lookup, Date, Roll-Up
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

orgfarm-3a1418c0f7-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lg5000000Cxif/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

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

Restriction Rules

Fields & Relationships

10 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

Current Stock Level	Current_Stock_Level__c	Number(18, 0)	
Last Modified By	LastModifiedById	Lookup(User)	
Minimum Stock Level	Minimum_Stock_Level__c	Number(6, 0)	
Owner	OwnerId	Lookup(User,Group)	✓
Product Description	Product_Description__c	Text Area(255)	
Product ID	Name	Text(80)	✓
Product Name	Product_Name__c	Text(255)	
Supplier ID	Supplier_ID__c	Lookup(Supplier)	✓
Unit Price	Unit_Price__c	Currency(16, 2)	

Page Layout Editing (5 Layouts)

Parameter	Details
Module Summary	Updated layouts for Product, Purchase Order, Order Item, Inventory Transactio
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

SetupHomeObject Manager

Supplier

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction Rules

Page Layouts

1 Items, Sorted by Page Layout Name

PAGE LAYOUT NAME

CREATED BY

MODIFIED BY

Supplier Layout

Femila Murugan, 10/28/2025, 1:10 AM

Femila Murugan, 10/28/2025, 11:18 PM

PAK - SAIn 7 hours

Search

ENG IN

13:41:3301-11-2025

Compact Layouts

Parameter	Details
Module Summary	Created compact layouts for Product & Purchase Order
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

Product | Sal

Search Setup

SetupHomeObject Manager

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

Restriction Rules

Compact Layouts

2 Items, Sorted by Label

Quick Find

NewCompact Layout Assignment

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
Product Compact Layout	Product_Compact_Layout	✔	Femila Murugan	10/28/2025, 11:21 PM
System Default	SYSTEM			

Air: Moderate Today

Search

ENG IN

13:43:01 01-11-2025

Validation Rule

Parameter	Details
Module Summary	Implemented validation rule for Expected Delivery Date
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Purchase Order

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

Validation Rules

1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Expected_Delivery_Date_Validation	Top of Page	The Expected Delivery Date should not exceed 7 days.	✔	Femila Murugan, 10/28/2025, 11:25 PM

Finance headline

India reported -...

Q Search

ENG IN

13:44:30

01-11-2025

Profiles

Parameter	Details
Module Summary	Created Inventory Manager & Purchase Manager profiles
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

orgfarm-3a1418c0f7-dev-ed.develop.my.salesforce-setup.com/lightning/setup/EnhancedProfiles/home

Search Setup

SetupHomeObject Manager

profi

UsersProfiles

Didn't find what you're looking for? Try using Global Search.

SETUPProfiles

Profiles

All ProfilesEditDeleteCreate New View

New Profile

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

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

1-6 of 60 Selected

PreviousNext

Page 1 of 1

Very high UVNow

Search

ENGIN

13:46:1601-11-2025

Roles

Parameter	Details
Module Summary	Created Purchasing Manager Role & Inventory Manager Role
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

Welcome to x

- Student x

Medical Inve x

(anonymous x

Prevent-Use x

(933) Vaarth x

Recently Vie x

Roles | Sales x

+ x

- x

x

orgfarm-3a1418c0f7-dev-ed.develop.my.salesforce-setup.com/lightning/setup/Roles/home

Search Setup

Star Plus Refresh Help Settings 2 Profile

Setup Home Object Manager

roles

Users Roles Feature Settings Sales Service Case Teams

Didn't find what you're looking for? Try using Global Search.

SETUP Roles

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample

Executive Staff

CEO President CFO VP, Sales

* View & edit data, roll up forecasts, & generate reports for all users below

* Can't access data of other Executive Staff

Western Sales Director

Director of W. Sales

* View & edit data, roll up forecasts, & generate reports for all users directly below

* Can't access data of users above or at same level

Eastern Sales Director

Director of E. Sales

* View & edit data, roll up forecasts, & generate reports only for own data

* Can't access data of users above or at same level

International Sales Director

Director of Int'l Sales

* View & edit data, roll up forecasts, & generate reports only for own data

* Can't access data of users above or at same level

Western Sales Rep

CA Sales Rep OR Sales Rep

Eastern Sales Rep

NY Sales Rep MA Sales Rep

International Sales Rep

Asian Sales Rep European Sales Rep

Set Up Roles

Don't show this page again

Very high UV Now

Search

Taskbar icons

ENG IN 13:47:20 01-11-2025

Permission Sets

Parameter	Details
Module Summary	Created permission set for user access
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

Setup

Home

Object Manager

permission

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for? Try using Global Search.

SETUP

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets

Edit

Delete

Create New View

New

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

Action	Permission Set Name	Description	License
Clone	SCRT2 Integration User	Give SCRT2 Integration User necessary access	Cloud Integration User
Clone	Sales Cloud User	Denotes that the user is a Sales Cloud user.	Sales User
Clone	Sales Engagement Basic User	Access basic sales automation and email productivity features, incl...	Sales Engagement Basic
Clone	Salesforce Apex Guru	Gives Apex Guru access to analyze code for anti patterns.	Cloud Integration User
Clone	Salesforce CMS Integration Admin	Gives the admin data access and the permissions to integrate Sale...	Cloud Integration User
Clone	Salesforce Console User	Enable Salesforce Console User	Sales Console User
Clone	Salesforce Pricing Admin	Allow org users to manage the setup pages.	Salesforce Pricing Design Time
Clone	Salesforce Pricing Design Time User	Allow create, read, update, and delete access to all design time objects.	Salesforce Pricing Design Time
Clone	Salesforce Pricing Manager	Allow create, read, and edit access to all pricing objects and features.	Salesforce Pricing Run Time
Clone	Salesforce Pricing Run Time User	Allow read access for all Salesforce Pricing objects.	Salesforce Pricing Run Time
Clone	Salesforce Scheduler Greeter	Let users manage drop-in customers and customers with scheduled a...	Salesforce Scheduler Greeter
Clone	SeaS Indexing C2C User Perm	Allows the user to access entities indexed by SeaS indexing pipeline.	Cloud Integration User

1-19 of 19

0 Selected

Previous

Next

Page 1 of 1

33°C

Sunny

Search

ENG

IN

13:49:02

01-11-2025

Flows

Parameter	Details
Module Summary	Configured flow to update Actual Delivery Date
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

Setup

Home

Object Manager

flow

Apps

Lightning Bolt

Flow Category

Einstein

Einstein Generative AI

Flow Creation with Einstein

Process Automation

Automation App

Flows

Migrate to Flow

Paused And Failed Flow Interviews

Process Builder

Workflow Actions

Email Alerts

Field Updates

Outbound Messages

Flows

Flow Trigger Explorer

New Flow

Flow Definitions

All Flows

50+ Items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

Flow Label ↑	Process Type	Active	Tem...	Package State	Pac...	Last Modifie...	Last Modified D...
Actual Delivery Date Updating	Autolaunched Flow	✔	☐	Unmanaged		Femila Murugan	10/29/2025, 1:31 AM
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	✔	☐	Managed-Installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	✔	✔	Managed-Installed			
Approvals Workflow: Process Approval Submission	Screen Flow	✔	☐	Managed-Installed			
Authentication Provider User Registration	Identity User Registration Flow	☐	✔	Managed-Installed			
Basic Approval Request	Flow Orchestration for CMS	✔	✔	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	✔	✔	Managed-Installed			
Cancel All Eligible Items Flow	Screen Flow	☐	✔	Managed-Installed			
Cancel Item Flow	Screen Flow	☐	✔	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	☐	✔	Managed-Installed			
Chats Routed to Agents and Queues	Omni-Channel Flow	✔	✔	Managed-Installed			

33°C Sunny

Search

ENG IN

13:50:03 01-11-2025

Triggers

Parameter	Details
Module Summary	Wrote trigger to calculate total amount in Order Item
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

Developer Console - Google Chrome

orgfarm-6ad5dd7908-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help

CalculateTotalAmountTrigger.apxt CalculateTotalAmountHandler.apxc

Code Coverage: None API Version: 65 Go To

1 trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after u

2 // Call the handler class to handle the logic

! 3 CalculateTotalAmountHandler.calculateTotal(

4 Trigger.new,

5 Trigger.old,

6 Trigger.isInsert,

7 Trigger.isUpdate,

8 Trigger.isDelete,

9 Trigger.isUndelete

10);

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
Gowri M	Unknown	ApexTestHandler	10/30/2025, 4:06:09 PM	Success	Unread	517 bytes
Gowri M	Unknown	ApexTestHandler	10/30/2025, 4:06:09 PM	Success	Unread	2.21 KB

Filter Click here to filter the log list

Type here to search

34°C Mostly sunny 4:06 PM 10/30/2025

Reports

Parameter	Details
Module Summary	Created Purchase Orders Summary & Complete Purchase Details Report
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

Medical Inventory Manage...

Products

Purchase Orders

Order Items

Inventory Transactions

Suppliers

Reports

Dashboards

Reports

Recent

2 items

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Report Name

Description

Folder

Created By

Created On

Subscribed

Complete Purchase Details Report

Private Reports

Femila Murugan

10/29/2025, 3:16 AM

Purchase Orders based on Suppliers

Private Reports

Femila Murugan

10/29/2025, 1:45 AM

Top Stories

Rajnath Singh pr...

Search

ENG IN

13:53:27

01-11-2025

Dashboards

Parameter	Details
Module Summary	Created dashboards and visualized reports
Execution Success	✔ Completed Successfully
Validation	Verified in Salesforce
Confidence	High execution accuracy

16Madhubala invited yo

16Madhubala/Naan-Mu

Medical Inventory Dashi

Flows | Salesforce

- Student

orgfarm-94b2f2932a-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Zg5000000RhDIEAK/view?queryScope=userFol...

Cloud Service Life-C...Naan Mudhalvan M...freshers.hcltech.com

Medical Inventory Manage...

Products

Purchase Orders

Order Items

Inventory Transactions

Suppliers

Reports

Dashboards

Dashboard

Medical Inventory DashBoard

Last refreshed 2 days ago. Refresh this dashboard to see the latest data.

As of Oct 28, 2025, 3:35 AM · Viewing as Monisha C

Purchase Orders based on Suppliers

Record Count

3

2

1

0

1

2

Supplier ID

Purchase Order: ID

a01g5000001uZAc

a01g5000001udSk

a01g5000001uulIF

a01g5000001uYDN

a01g5000001ugf8

a01g5000001uly9

View Report (Purchase Orders b...

As of Oct 28, 2025, 3:35 AM

Air Moderate Sunday

Q Search

ENG IN

16:32 30-10-2025

Conclusion

The Medical Inventory Management system in Salesforce was configured successfully using core Salesforce components including Objects, Fields, Page Layouts, Validation Rules, Role Hierarchy, Profiles, Permission Sets, Flows, Triggers, Reports, and Dashboards. The system ensures proper tracking, procurement, and monitoring of medical products, demonstrating end-to-end inventory automation capabilities using Salesforce platform.