

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

The screenshot shows the Salesforce Developer Edition sign-up page. The left side features a dark blue background with the Salesforce logo and a large white text block: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, there's a "Sign up for your Developer Edition." section with a bulleted list of benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". On the right, there's a form titled "Sign up for your Developer Edition" with fields for First name (Femila), Last name (Murugan), Job title (developer), Work email (chinnasakthi33@gmail.com), Company (nadar saraswathi coll), and Country/Region (India). A checkbox for agreeing to the terms is checked. At the bottom, there's a note about org provisioning and a link to the Privacy Statement.

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

The screenshot shows the Salesforce Setup Object Manager interface. On the left, a sidebar lists various configuration options: 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, and Restriction Rules. The main area is titled 'Product' under 'SETUP > OBJECT MANAGER'. It displays the 'Product' object's details. The 'Record Name' field is set to 'PRODUCT ID' and the 'Data Type' is 'Text'. A warning message states: 'Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.' The 'Optional Features' section includes checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Object Classification' section contains checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section shows 'Deployed' is selected. The 'Search Status' section has 'Allow Search' checked. At the bottom of the page, there is a status bar with icons for weather (Hot days ahead, 32°C), search, file, folder, file manager, task list, calendar, and messaging, along with system status indicators like battery level, signal strength, and network connection.

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

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The 'Custom Object Tabs' section lists five tabs: 'Inventory Transactions', 'Order Items', 'Products', 'Purchase Orders', and 'Suppliers', each with a 'Stethoscope' tab style. The 'Web Tabs' and 'Visualforce Tabs' sections both show 'No Web Tabs have been defined' and 'No Visualforce Tabs have been defined'. The 'Lightning Component Tabs' section lists two tabs: 'Get Started with Agentforce' (Heart style) and 'Get Started with Data Cloud' (Map style). The top navigation bar includes tabs for 'Home', 'Object Manager', and 'Setup', along with a search bar and various system icons.

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

The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar navigation includes 'Setup' (selected), 'Home', and 'Object Manager'. A search bar at the top right contains the text 'app'. The main content area is titled 'Lightning Experience App Manager' and displays a table of 28 items. The table columns are: App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The table lists various apps such as 'Developer Edition', 'Digital Experiences', 'Lightning Usage App', 'Marketing CRM Classic', 'Medical Inventory Management', etc. The 'Medical Inventory Management' app is listed under 'Developer Edition'.

App Name	Developer Name	Description	Last Modified	App Type	Visibility
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	✓

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

The screenshot shows the Salesforce setup interface for managing object fields. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER" followed by "Product". On the left, a sidebar lists various configuration options under "Fields & Relationships". The main content area is titled "Fields & Relationships" and displays 10 items, sorted by Field Label. Each item shows the field name, its API name, and its data type. A "Quick Find" search bar and several action buttons (New, Deleted Fields, Field Dependencies, Set History Tracking) are located at the top right of the list.

Field Label	API Name	Type
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)

At the bottom of the screen, there is a taskbar with icons for various applications and a system status bar showing the date (01-11-2025), time (13:39:22), and language (ENG IN).

Page Layout Editing (5 Layouts)

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

The screenshot shows the Salesforce Setup interface for managing object layouts. The top navigation bar includes tabs for Welcome to, Student, Medical Inv., (anonymous), Prevent-User, (933) Vaarth, Recently Viewed, and Supplier | Sa. Below the bar, there's a search bar labeled "Search Setup" and a toolbar with various icons.

The main area displays the "Object Manager" for the "Supplier" object. On the left, a sidebar lists navigation options: Details, Fields & Relationships, Page Layouts (which is selected and highlighted in blue), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules.

The central content area is titled "Page Layouts" and shows a single item: "Supplier Layout". The table details the layout's creation and modification information:

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

At the bottom of the page, there are standard browser controls (Back, Forward, Stop, Refresh) and a status bar showing system notifications, language (ENG IN), date (01-11-2025), and time (13:41:33).

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

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

The screenshot shows the Salesforce Setup interface. The URL in the browser is <https://orgfarm-3a1418c0f7-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lg5000000Cxlt/ValidationRules/view>. The page title is "Purchase Order". On the left, there is a sidebar with various setup options like 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, and Restriction Rules. The main content area is titled "Validation Rules" and shows a table with one item: "Expected_Delivery_Date_Validation" (Rule Name), "Top of Page" (Error Location), "The Expected Delivery Date should not exceed 7 days." (Error Message), checked (Active), and Femila Murugan (Modified By). The bottom of the screen shows the Windows taskbar with various pinned icons and system status.

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

Profiles

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

The screenshot shows the Salesforce Lightning Setup interface. The top navigation bar includes tabs for 'Welcome to', '- Student', 'Medical Inv...', '(anonymous)', 'Prevent-Use...', '(933) Vaarth...', 'Recently Viewed', and 'Profiles | Sal...'. The URL in the address bar is orgfarm-3a1418c0f7-dev-ed.develop.my.salesforce-setup.com/lightning/setup/EnhancedProfiles/home. The page title is 'Profiles' under the 'SETUP' tab. The left sidebar has 'Setup' selected, with 'Home' and 'Object Manager' as other options. A search bar at the top right contains the placeholder 'Search Setup'. The main content area is titled 'Profiles' and shows a list of profiles. The list includes:

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

Below the table, there are navigation links for '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'. At the bottom, there are buttons for '1-8 of 8', '0 Selected', 'Previous', 'Next', and 'Page 1 of 1'. The bottom status bar shows system icons and the date/time '13:46:16 01-11-2025'.

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 - Student - Medical Inv... - (anonymous) - Prevent-Use - (933) Vaarth... - Recently Viewed - Roles | Sales + -

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

Setup Home Object Manager

roles

Users Roles Feature Settings Sales Service Case Teams Case Team Roles Contact Roles on Cases

Didnt find what you're looking for? Try using Global Search.

Search Setup

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

Western Sales Director

- Director of W. Sales

Eastern Sales Director

- Director of E. Sales

International Sales Director

- Director of Int'l Sales

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

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

* Can't access data of other Executive Staff

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

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

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

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

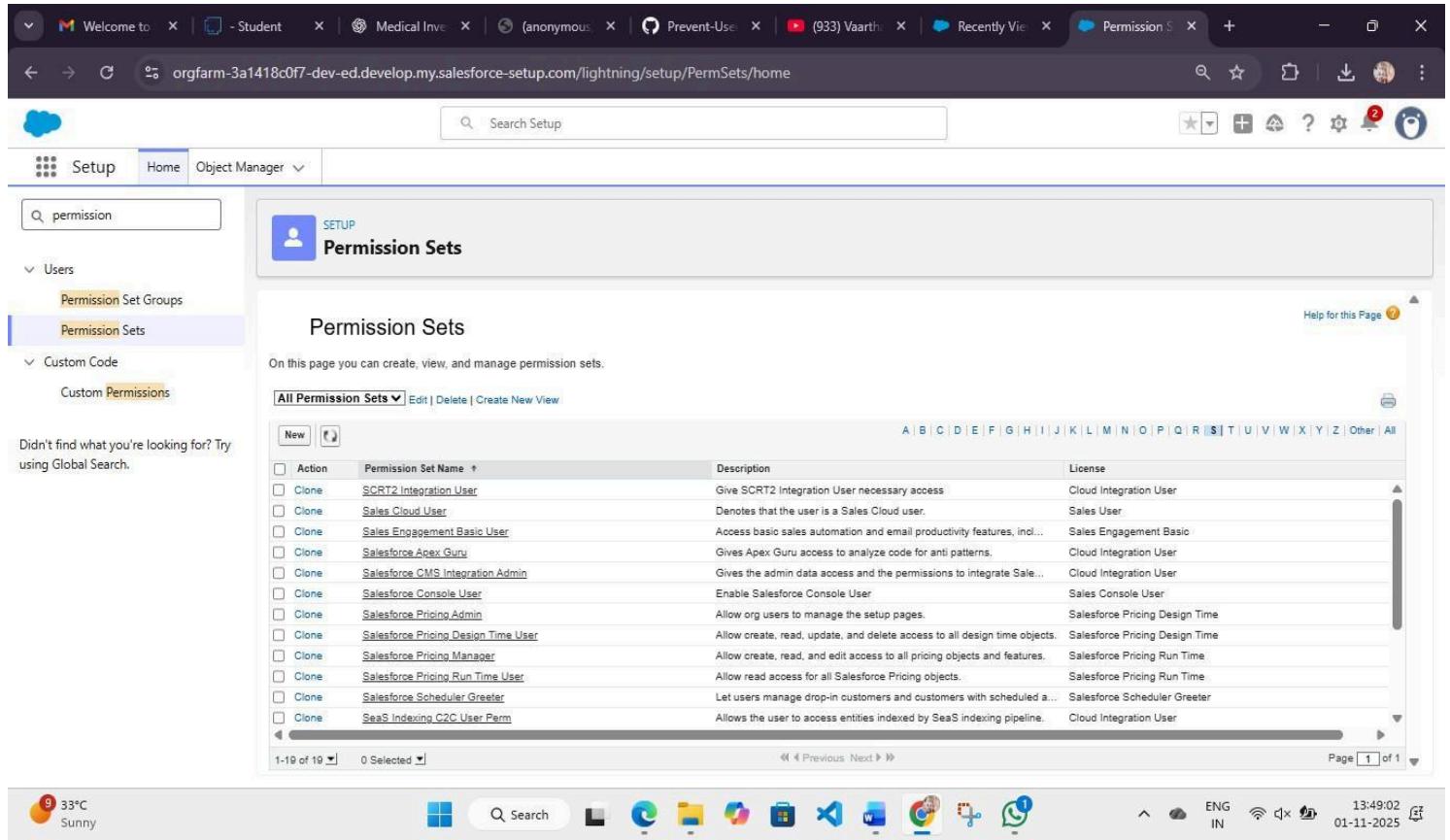
Set Up Roles

Don't show this page again

Very high UV Now 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



The screenshot shows the Salesforce Lightning Setup interface. The top navigation bar includes tabs for 'Welcome to', 'Student', 'Medical Inv...', '(anonymous)', 'Prevent-User...', '(933) Vaarth...', 'Recently Viewed', and 'Permission Sets'. Below the navigation is a search bar and a toolbar with various icons.

The main area is titled 'Permission Sets' under the 'SETUP' tab. On the left, a sidebar menu is open, showing sections like 'Users', 'Permission Set Groups', and 'Permission Sets' (which is selected). Other sections include 'Custom Code' and 'Custom Permissions'. A global search bar at the top left contains the text 'permission'.

The central content area displays a table of 'Permission Sets'. The columns are 'Action', 'Permission Set Name', 'Description', and 'License'. The table lists 19 rows, each representing a different permission set, such as 'SCRT2 Integration User', 'Sales Cloud User', 'Sales Engagement Basic User', etc. At the bottom of the table, there are pagination controls showing '1-19 of 19' and '0 Selected'. There are also links for 'All Permission Sets', 'Edit', 'Delete', and 'Create New View'.

At the very bottom of the screen, a Windows taskbar is visible, showing icons for various applications like File Explorer, Microsoft Edge, and Microsoft Word. The system tray shows the date and time as '01-11-2025 13:49:02'.

Flows

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

The screenshot shows the Salesforce Setup Flows page. On the left, there is a sidebar with a search bar and a navigation menu. The main area displays a table of flow definitions with columns for Flow Label, Process Type, Active, Tem..., Package State, Pac..., Last Modified..., and Last Modified D... . There are 50+ items listed, sorted by Flow Label.

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

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

The screenshot shows the Salesforce Developer Console interface. At the top, the title bar reads "Developer Console - Google Chrome" and the URL is "orgfarm-6ad5dd7908-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The menu bar includes "File", "Edit", "Debug", "Test", "Workspace", "Help", and navigation buttons. Below the menu is a tabs section with "CalculateTotalAmountTrigger.apxt" (selected) and "CalculateTotalAmountHandler.apxc". A status bar at the bottom shows "Code Coverage: None" and "API Version: 65".

The main area contains the Apex trigger code:

```
1 trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
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    );
}
```

Below the code editor is a "Logs" tab, which displays the following log entries:

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

At the bottom of the screen is the Windows taskbar, showing the Start button, a search bar with "Type here to search", and icons for various applications like File Explorer, Edge, and Google Chrome. The system tray shows the date and time as "4:06 PM 10/30/2025" and a notification count of 6.

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

The screenshot shows the Salesforce Lightning interface for a 'Medical Inventory Management' application. The top navigation bar includes links for 'Products', 'Purchase Orders', 'Order Items', 'Inventory Transactions', 'Suppliers', 'Reports' (which is currently selected), and 'Dashboards'. The main content area displays a list of recent reports. The left sidebar has sections for 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', 'Shared with Me', and 'Favorites'. A search bar at the top right allows users to search for recent reports. At the bottom, there's a taskbar with various icons and system status indicators.

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		

Dashboards

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

Screenshot of a web browser showing the "Medical Inventory DashBoard". The dashboard displays a chart titled "Purchase Orders based on Suppliers" showing the record count for two suppliers. Supplier ID 1 has 3 records, and Supplier ID 2 has 2 records. A legend lists Purchase Order IDs: a01g5000001uZAc, a01g5000001udSk, a01g5000001ullF, a01g5000001uYDN, a01g5000001ugf8, and a01g5000001uly9.

Purchase Order ID	Supplier ID	Record Count
a01g5000001uZAc	1	3
a01g5000001udSk	1	2
a01g5000001ullF	1	1
a01g5000001uYDN	1	1
a01g5000001ugf8	2	1
a01g5000001uly9	2	1

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

16Madhubala invited yo 16Madhubala/Naan-Mu Medical Inventory Dash Flows | Salesforce - Student Action required

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

Search... ★ + ? ⚙️ 🔔 👤

Medical Inventory Manage... Products Purchase Orders Order Items Inventory Transactions Suppliers Reports Dashboards

Dashboard Refresh Edit Subscribe

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

Purchase Order: ID

Supplier ID

View Report (Purchase Orders b... As of Oct 28, 2025, 3:35 AM

Air: Moderate Sunday 16:32 ENG IN 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.