

PROJECT TITLE: MEDICAL INVENTORY MANAGEMENT

Collage name: LRG Government arts college for women

Collage Code: bru07

TEAM ID: NM2025TMID28060

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1.INTRODUCTION

1.1 Project Overview

The Medical Inventory Management System is designed to streamline the management of medicines, suppliers, and purchase transactions within a healthcare organization. It allows users to efficiently manage purchase orders, order items, stock adjustments, and supplier-based reports, while minimizing errors in manual tracking.

1.2 Purpose

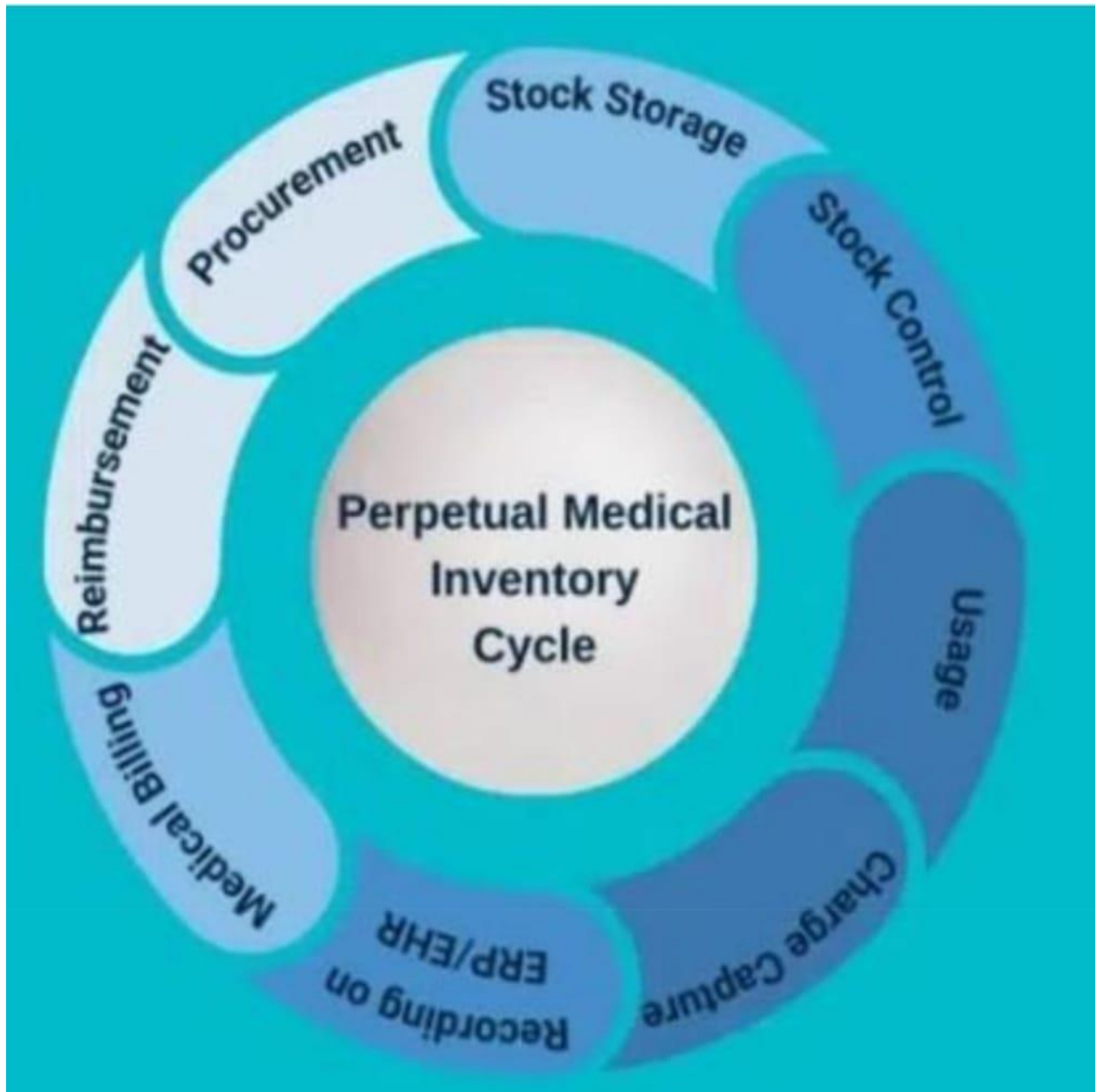
The main purpose of the project is to:

Track and manage purchase orders for medical supplies.

Maintain accurate records of inventory stock levels.

Enable quick generation of reports and dashboards for analysis.

Reduce data entry errors and ensure data integrity through validations.



2. DEVELOPMENT PHASE

Creating Developer Account

The project was developed on Salesforce Developer Org, created via:

<https://developer.salesforce.com/signup>

salesforce

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First name	Last name
<input type="text" value="Rasika"/>	<input type="text" value="C"/>
Job title	Work email
<input type="text" value="Developer"/>	<input type="text" value="rasika9705@gmail"/>
Company	Country/Region
<input type="text" value="LRG Govt Arts Col"/>	<input type="text" value="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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Object created

Purchase Order – To record supplier and order details.

The screenshot shows the Salesforce Setup interface for the 'Purchase Order' object. At the top, there is a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). Below this, a search bar is visible. The main content area is titled 'PURCHASE > OBJECT MANAGER' and 'Purchase Order'. On the left, a sidebar lists various configuration options: Details (selected), 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, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The 'Details' section is expanded, showing a table of object details. The table has two columns: 'Name' and 'Status'. The rows are: 'Description' (empty), 'API Name' (Purchase_Order__c), 'Custom' (checked), 'Singular Label' (Purchase Order), 'Plural Label' (Purchase Orders), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), 'Help Settings' (Standard salesforce.com Help Window), and 'Standard salesforce.com Help Window' (checked). At the top right of the details section, there are 'Edit' and 'Delete' buttons.

Name	Status
Description	
API Name	Purchase_Order__c
Custom	✓
Singular Label	Purchase Order
Plural Label	Purchase Orders
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window
Standard salesforce.com Help Window	✓

Order Item – To capture product-level details such as quantity and cost.

Star

+

?

Search Setup

Setup

Home

Object Manager

SETUP » OBJECT MANAGER

Order Item

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

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Details

Edit

Delete

Description

API Name

Order_Item__c

Custom

✓

Singular Label

Order Item

Plural Label

Order Items

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Supplier – To store supplier information.

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

Supplier

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

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Details

Edit

Delete

Description

API Name

Supplier__c

Custom

✓

Singular Label

Supplier

Plural Label

Suppliers

Enable Reports

✓

Track Activities

Track Field History


Deployment Status








Deployed


Help Settings

Standard salesforce.com Help Window

Inventory – To track stock availability.





 Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Inventory Transaction

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

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Details

EditDelete

Description

API Name

Inventory.Transaction__c

Custom

✓

Singular Label

Inventory Transaction

Plural Label

Inventory Transactions

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

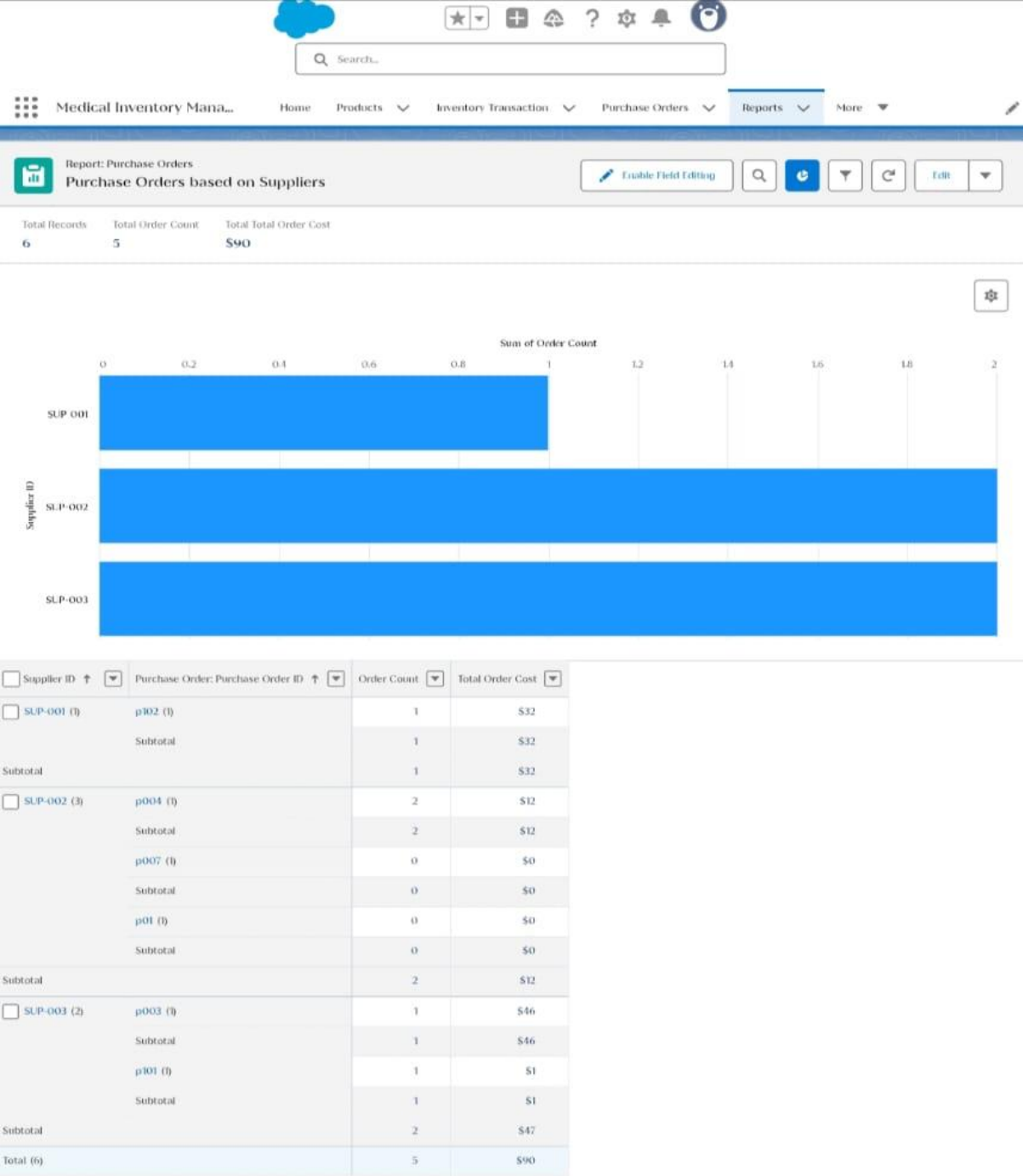
Help Settings

Standard salesforce.com Help Window

Fields & Relationships Configured

- *Lookup relationship between Purchase Order and Supplier.
- *Master-Detail relationship between *Purchase Order and Order Items.
- *Formula field for calculating Total Order Cost.

Dashboard “Medical Inventory Dashboard” with charts for supplier analysis



Report: Purchase Orders

Purchase Orders based on Suppliers

Enable Field Editing

🔍

📄

🔼

🔄

Edit

⌵

Total Records

6

Total Order Count

5

Total Total Order Cost

\$90

Sum of Order Count

0

0.2

0.4

0.6

0.8

1

1.2

1.4

1.6

1.8

2

Supplier ID

SUP-001

SUP-002

SUP-003





Search...



Medical Inventory Mana...

Home

Products

Inventory Transaction

Purchase Orders

Reports

More



Report: Purchase Orders with Order Items and Products
Complete Purchase Details Report

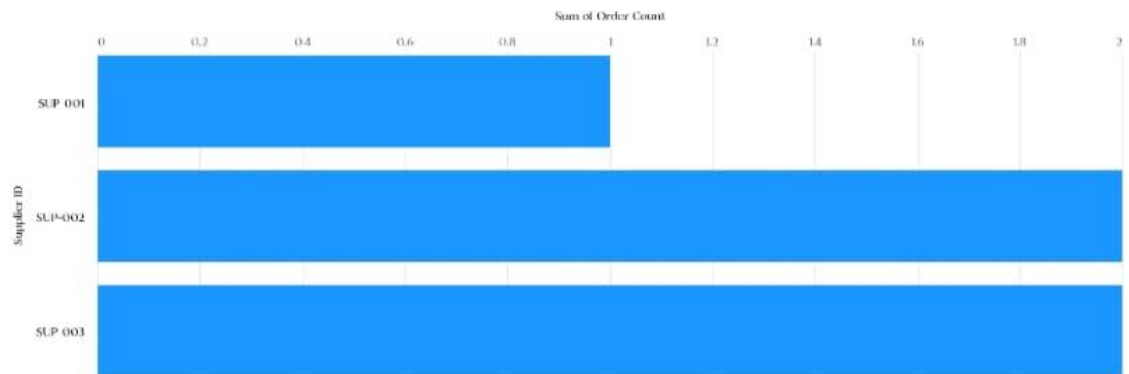
Enable Field Editing



Edit

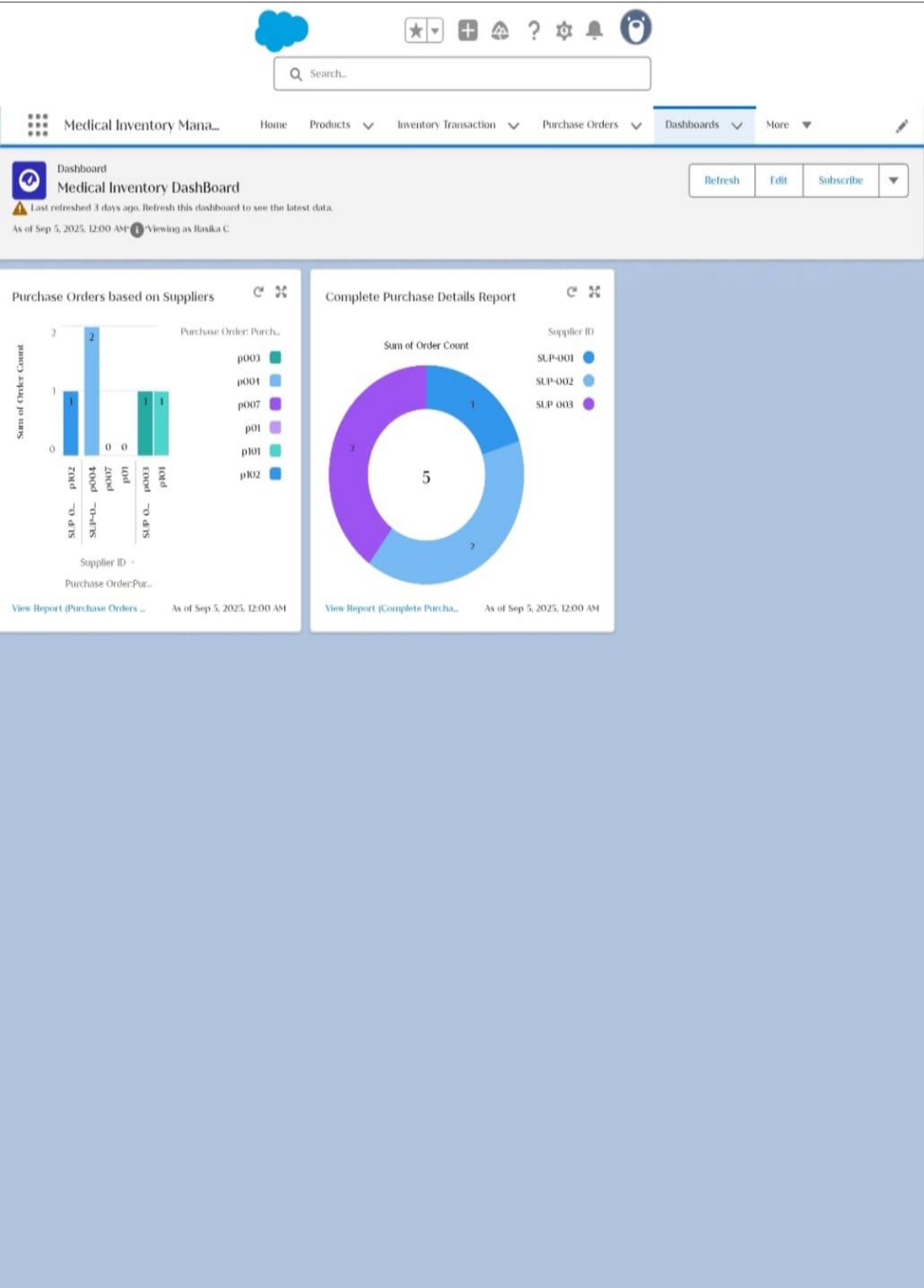


Total Records: 5
Total Order Count: 5
Total Amount: \$90.10



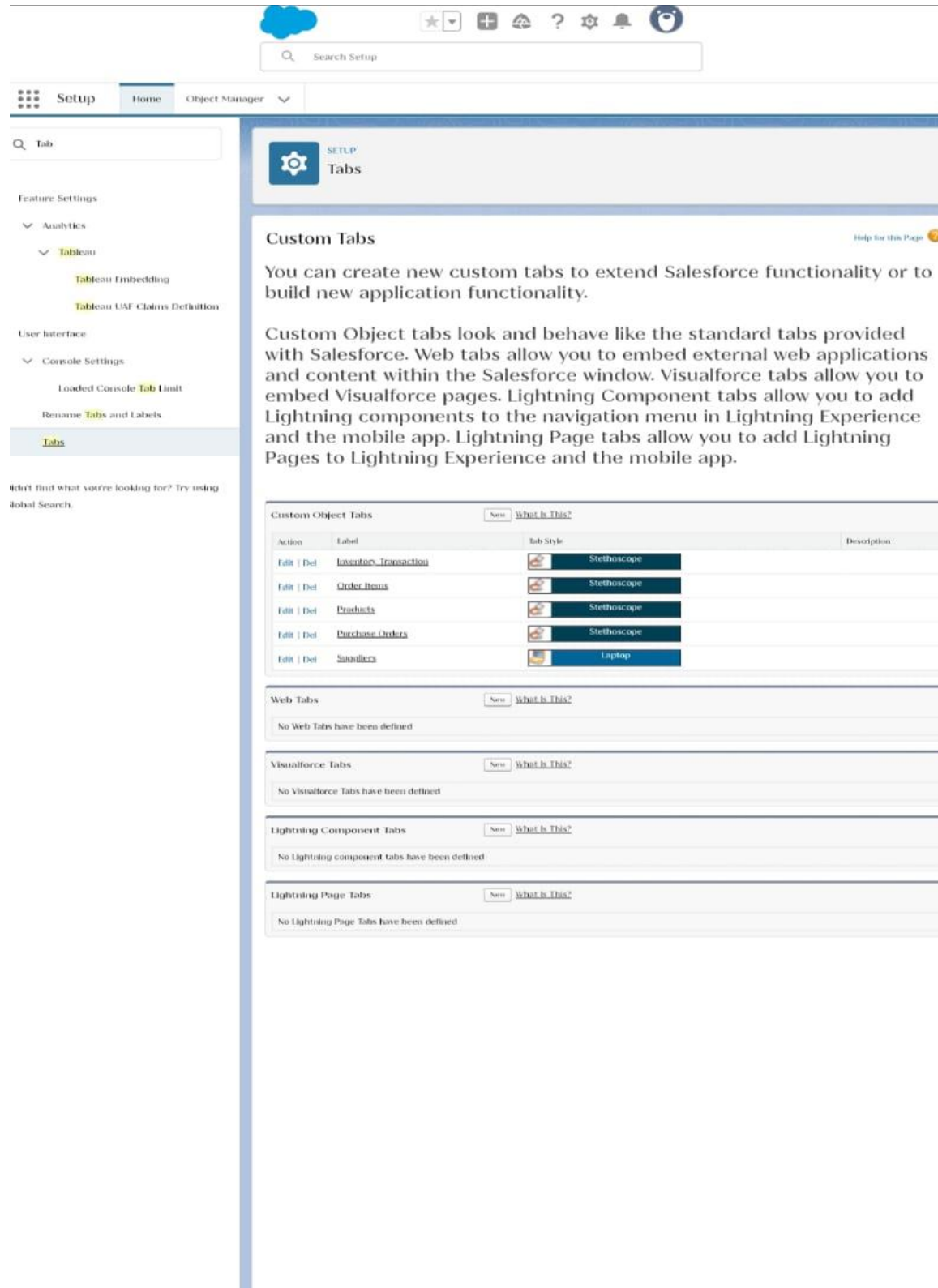
<input type="checkbox"/> Supplier ID	<input type="checkbox"/> Actual Delivery Date	<input type="checkbox"/> Purchase Order: Purchase Order ID	<input type="checkbox"/> Product ID: Product ID	<input type="checkbox"/> Product ID: Product Name	<input type="checkbox"/> Order Count	<input type="checkbox"/> Quantity Received
<input type="checkbox"/> SUP-001 (1)	3/1/2025 (1)	p102 (1)	p102	Zerodol-Sp	1	-
		Subtotal			1	
		Subtotal			1	
		Subtotal			1	
<input type="checkbox"/> SUP-002 (2)	3/1/2025 (2)	p004 (2)	p004	Paracetamol 650	2	-
			p004	Paracetamol 650	2	-
		Subtotal			2	
		Subtotal			2	
		Subtotal			2	
<input type="checkbox"/> SUP-003 (2)	3/1/2025 (2)	p003 (1)	p003	Glucagon	1	-
		Subtotal			1	
		p101 (1)	p101	Dolo T50	1	-
		Subtotal			1	
		Subtotal			2	
		Subtotal			2	
Total (5)					5	

Dashboard “Medical Inventory Dashboard” with charts for supplier analysis



4.IMPLEMENTATION

Tabs: you can create new custom tabs to extend sales for functionality or to build new application functionality.



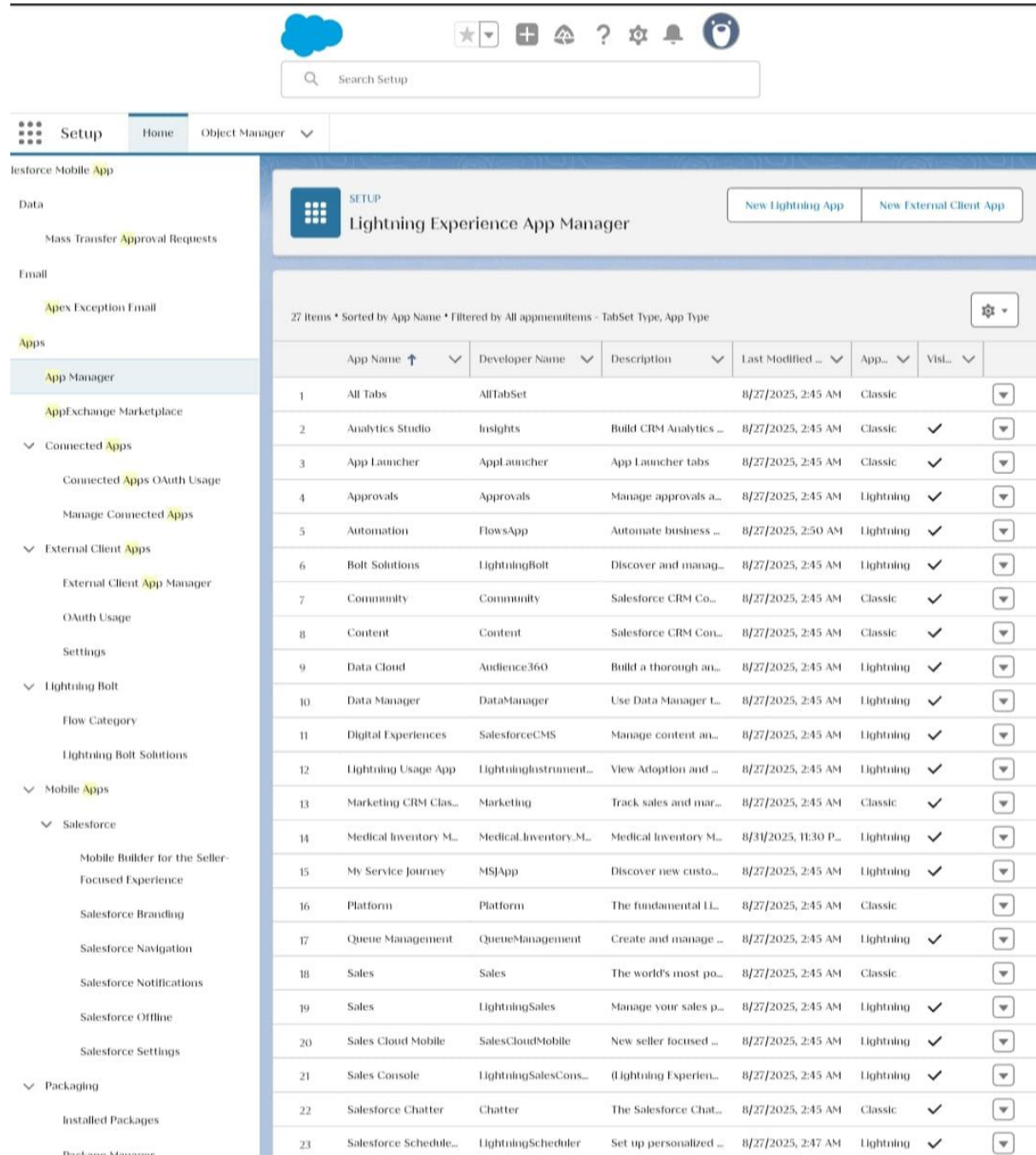
The screenshot displays the Salesforce Setup interface. On the left sidebar, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Feature Settings' section is expanded, and 'Analytics' is selected. Under 'Analytics', 'Tableau' is expanded, and 'Tableau Embedding' is selected. The 'User Interface' section is also expanded, and 'Console Settings' is selected. Under 'Console Settings', 'Loaded Console Tab Limit' is selected. The 'Tabs' link is highlighted in the left sidebar.

The main content area shows the 'Custom Tabs' page. It includes a search bar at the top with the text 'Search Setup'. Below the search bar, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Feature Settings' section is expanded, and 'Analytics' is selected. Under 'Analytics', 'Tableau' is expanded, and 'Tableau Embedding' is selected. The 'User Interface' section is also expanded, and 'Console Settings' is selected. Under 'Console Settings', 'Loaded Console Tab Limit' is selected. The 'Tabs' link is highlighted in the left sidebar.

The 'Custom Tabs' page contains the following sections:

- Custom Object Tabs**: A table listing custom object tabs. The table has columns for 'Action', 'Label', 'Tab Style', and 'Description'. The rows are: 'Inventory Transaction' (Stethoscope), 'Order Items' (Stethoscope), 'Products' (Stethoscope), 'Purchase Orders' (Stethoscope), and 'Suppliers' (Laptop).
- Web Tabs**: A section indicating that no web tabs have been defined.
- Visualforce Tabs**: A section indicating that no visualforce tabs have been defined.
- Lightning Component Tabs**: A section indicating that no lightning component tabs have been defined.
- Lightning Page Tabs**: A section indicating that no lightning page tabs have been defined.

Lightnings App: Is used to create a medical inventory management, which shows as a dashboard in that it allows us to provide the data, reports etc....,,



Setup Home Object Manager

lesforce Mobile App

Data

Mass Transfer Approval Requests

Email

Apex Exception Email

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

External Client Apps

External Client App Manager

OAuth Usage

Settings

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Mobile Builder for the Seller-Focused Experience

Salesforce Branding

Salesforce Navigation

Salesforce Notifications

Salesforce Offline

Salesforce Settings

Packaging

Installed Packages

Package Manager

SETUP

Lightning Experience App Manager

New Lightning App New External Client App

27 Items • Sorted by App Name • Filtered by All appnames - TabSet Type, App Type

	App Name	Developer Name	Description	Last Modified	App..	Visl..	
1	All Tabs	AllTabSet		8/27/2025, 2:45 AM	Classic		
2	Analytics Studio	Insights	Build CRM Analytics ...	8/27/2025, 2:45 AM	Classic	✓	
3	App Launcher	AppLauncher	App Launcher tabs	8/27/2025, 2:45 AM	Classic	✓	
4	Approvals	Approvals	Manage approvals a...	8/27/2025, 2:45 AM	Lightning	✓	
5	Automation	FlowsApp	Automate business ...	8/27/2025, 2:50 AM	Lightning	✓	
6	Bolt Solutions	LightningBolt	Discover and manag...	8/27/2025, 2:45 AM	Lightning	✓	
7	Community	Community	Salesforce CRM Co...	8/27/2025, 2:45 AM	Classic	✓	
8	Content	Content	Salesforce CRM Con...	8/27/2025, 2:45 AM	Classic	✓	
9	Data Cloud	Audience360	Build a thorough an...	8/27/2025, 2:45 AM	Lightning	✓	
10	Data Manager	DataManager	Use Data Manager L...	8/27/2025, 2:45 AM	Lightning	✓	
11	Digital Experiences	SalesforceCMS	Manage content an...	8/27/2025, 2:45 AM	Lightning	✓	
12	Lightning Usage App	LightningInstrument...	View Adoption and ...	8/27/2025, 2:45 AM	Lightning	✓	
13	Marketing CRM Clas...	Marketing	Track sales and mar...	8/27/2025, 2:45 AM	Classic	✓	
14	Medical Inventory M...	Medical.Inventory.M...	Medical Inventory M...	8/31/2025, 11:30 P...	Lightning	✓	
15	My Service Journey	MSJApp	Discover new custo...	8/27/2025, 2:45 AM	Lightning	✓	
16	Platform	Platform	The fundamental LL...	8/27/2025, 2:45 AM	Classic		
17	Queue Management	QueueManagement	Create and manage ...	8/27/2025, 2:45 AM	Lightning	✓	
18	Sales	Sales	The world's most po...	8/27/2025, 2:45 AM	Classic		
19	Sales	LightningSales	Manage your sales p...	8/27/2025, 2:45 AM	Lightning	✓	
20	Sales Cloud Mobile	SalesCloudMobile	New seller focused ...	8/27/2025, 2:45 AM	Lightning	✓	
21	Sales Console	LightningSalesCons...	(Lightning Experien...	8/27/2025, 2:45 AM	Lightning	✓	
22	Salesforce Chatter	Chatter	The Salesforce Chat...	8/27/2025, 2:45 AM	Classic	✓	
23	Salesforce Schedule...	LightningScheduler	Set up personalized ...	8/27/2025, 2:47 AM	Lightning	✓	

Text field: A text field is used whenever you need to capture descriptive or alphanumeric details that identify, describe, or provide context about medical items, suppliers, or transactions.

The screenshot shows the Salesforce Setup interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' (selected). Below this, the breadcrumb trail reads 'SETUP > OBJECT MANAGER > Product'. The main content area is titled 'Details' and contains a list of configuration options on the left and a table of settings on the right. The table has two columns: 'Field Name' and 'Value'. The settings include 'Description' (empty), 'API Name' (Product__c), 'Custom' (checked), 'Singular Label' (Product), 'Plural Label' (Products), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), and 'Help Settings' (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner of the details section.

Field Name	Value
Description	
API Name	Product__c
Custom	✓
Singular Label	Product
Plural Label	Products
Enable Reports	✓
Track Activities	✓
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Validation Rules: Prevent negative or blank quantities.

Setup

Home

Object Manager

Per

Hyperforce Assistant

Users

Permission Set Groups

Permission Sets

Apps

Mobile Apps

Salesforce

Mobile Builder for the Seller-Focused Experience

Feature Settings

Digital Experiences

Salesforce CMS

Settings

Functions

Sales

Accounts

Person Accounts

Salesforce Scheduler

Assignment Policies

Salesforce Scheduler Settings

Scheduling Policies

Skills

Troubleshooter

Service

Omni-Channel

Supervisor

Supervisor Configurations

Supervisor Settings

SETUP

Permission Sets

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

<input type="checkbox"/> Action	Permission Set Name ↑	Description
<input type="checkbox"/> Clone	(Legacy) Data Cloud Data Aware Specialist	This Data Cloud permission set
<input type="checkbox"/> Clone	(Legacy) Data Cloud Marketing Admin	Allows access to Data Cloud Set
<input type="checkbox"/> Clone	(Legacy) Data Cloud Marketing Manager	This Data Cloud permission set
<input type="checkbox"/> Clone	(Legacy) Data Cloud Marketing Specialist	This Data Cloud permission set
<input type="checkbox"/> Clone	(Legacy) Data Cloud for Marketing Data Aware-	This Data Cloud permission set
<input type="checkbox"/> Clone	(Legacy) Data Cloud for Marketing Manager	This Data Cloud permission set
<input type="checkbox"/> Clone	(Legacy) Data Cloud for Marketing Specialist	This Data Cloud permission set
<input type="checkbox"/> Clone	Access Agentforce Default Agent	Gives users access to the defau
<input type="checkbox"/> Clone	Agent Platform Builder	Allow access to agent platform.
<input type="checkbox"/> Clone	Agentforce Default Admin	Allows users to build and mana
<input type="checkbox"/> Clone	Agentforce Service Agent Configuration	Build and manage autonomis
<input type="checkbox"/> Clone	Agentforce Service Agent Object Access	Access knowledge articles and i
<input type="checkbox"/> Clone	Agentforce Service Agent Secure Base	Set up and use Agentforce Serv
<input type="checkbox"/> Clone	Agentforce Service Agent User	Analyze topics and perform act
<input type="checkbox"/> Clone	Authenticated Payer	An authenticated external user
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, a
<input type="checkbox"/> Clone	C360 High Scale Flow Integration User	Allows integration user to acces
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales
<input type="checkbox"/> Clone	Code Builder User	Enables the user to create and.
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce adm
<input type="checkbox"/> Clone	Commerce Session	Allow access to session-based p
<input type="checkbox"/> Clone	ConnectivityServiceCASCPermSet	
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice co
<input type="checkbox"/> Clone	Contact Center Admin (Partner Telephony)	Manage Service Cloud Voice co

Page layout: The Page Layout in the Product object is used to customize how medical product information is displayed, making it easier to manage medicines, ensure compliance, and improve accuracy in inventory management.

The screenshot displays the Salesforce Setup interface for configuring the Purchase Order Page Layout. The left sidebar contains a navigation menu with 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, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules, and Conditional Field Formatting. The main content area is titled 'Purchase Order Layout' and includes a 'Purchase Order Sample' section. This section contains a 'Highlights Panel' for customizing the highlights, 'Quick Actions in the Salesforce Classic' for the Publisher, and 'Salesforce Mobile and Lightning Experience Actions' for predefined actions. Below these, there are 'Standard Buttons' and 'Custom Buttons' for the 'Purchase Order Detail' view. At the bottom, there are two information panels: 'Information' (header visible on edit only) and 'System Information' (header visible on edit only), each displaying a list of fields and their values.

Purchase Order Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Field Name	Field Name	Field Name	Field Name
Expected Delivery...	Order Date	Total Order Cost	
Last Modified By	Owner		
Actual Delivery Date	Order Cost	Purchase Order ID	
Created By	Order Count	Supplier ID	

Purchase Order Sample

Highlights Panel

Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic

Publisher

Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Purchase Order Detail

Standard Buttons

Info Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

Custom Buttons

Information (Header visible on edit only)

Field Name	Field Name	Field Name	Field Name
Purchase Order ID	Sample Text	Actual Delivery Date	9/8/2025
Supplier ID	Sample Text	Order Count	82469
Order Date	9/8/2025	Total Order Cost	\$123.45
Order Cost	51846	Owner	Sample Text
Expected Delivery Date	9/8/2025		

System Information (Header visible on edit only)

Field Name	Field Name	Field Name	Field Name
Created By	Sample Text	Last Modified By	Sample Text



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

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Product Compact Layout

Product Compact Layout

[Help for this](#)

[* Back to Product](#)

Compact Layout Detail

[Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)

Label	Product Compact Layout	Object Name	Product
API Name	Product.Compact.Layout		
Included Fields	Current Stock Level Product Name Unit Price		
Created By	Basika C. 9/1/2025, 6:42 AM	Modified By	Basika C. 9/1/2025, 6:42 AM

[Edit](#) [Clone](#) [Delete](#) [Compact Layout Assignment](#)

Profiles: Profiles in medical inventory management are used to control user permissions. They decide who can view, create, edit, or delete records like Products, Purchase Orders, and Transactions, ensuring data security and proper role-based access.

Setup Home Object Manager

Search Setup

Pro

Hyperforce Assistant

- Users
- Profiles**
- Data
 - Mass Transfer Approval Requests
- Feature Settings
 - Approval Settings
 - Data.com
 - Prospector Preferences
 - Prospector Users
 - Functions
- Marketing
 - Lead Processes
- Sales
 - Products
 - Asset Settings
 - Product Schedules Settings
 - Product Settings
 - Sales Processes
- Salesforce Scheduler
 - Assignment Policies
 - Salesforce Scheduler Settings
 - Scheduling Policies
 - Skills
 - Troubleshooter
- Service
 - Entitlement Management
 - Entitlement Processes
 - Support Processes

Flattened

SETUP Profiles

Profile: Standard User [Help for this Page](#)

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

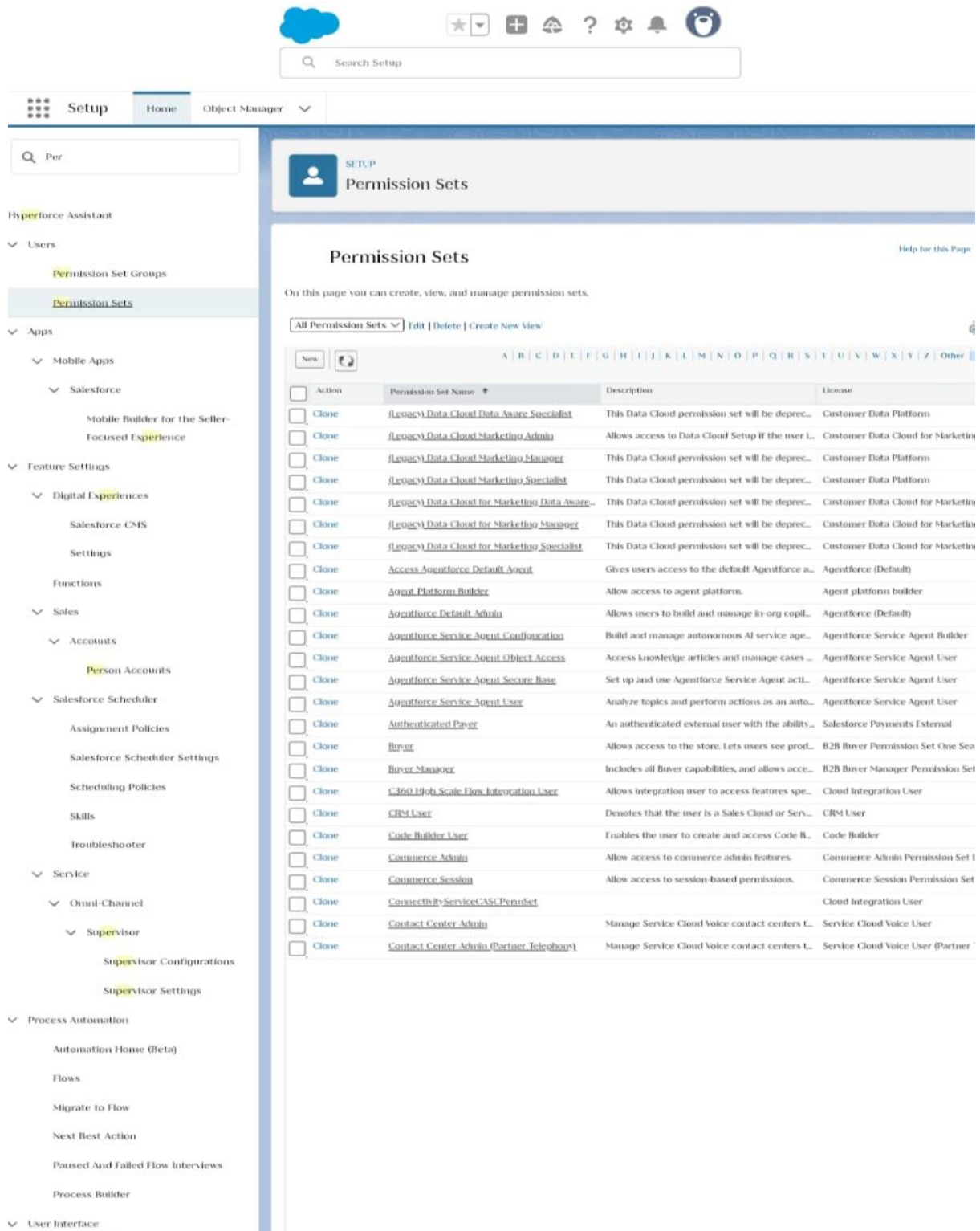
Profile Detail [Edit](#) [Clone](#) [View Users](#)

Name	Standard User	Custom Profile
User License	Salesforce	<input type="checkbox"/>
Created By	salesforce.com, inc., 8/27/2025, 2:45 AM	Modified By: Rasika C. 9/4/2025, 12:13 AM

Page Layouts

Standard Object Layouts			
Global	Global Layout View Assignment	Location Group	Location Group Layout View Assignment
Email Application	Not Assigned View Assignment	Location Group Assignment	Location Group Assignment Layout View Assignment
Home Page Layout	Home Page Default View Assignment	Macro	Macro Layout View Assignment
Account	Account Layout View Assignment	Object Milestone	Object Milestone Layout View Assignment
Alternative Payment Method	Alternative Payment Method Layout View Assignment	Operating Hours	Operating Hours Layout View Assignment
Appointment Invitation	Appointment Invitation Layout View Assignment	Opportunity	Opportunity Layout View Assignment
Asset	Asset Layout View Assignment	Opportunity Product	Opportunity Product Layout View Assignment
Asset Action	Asset Action Layout View Assignment	Order	Order Layout View Assignment
Asset Action Source	Asset Action Source Layout View Assignment	Order Product	Order Product Layout View Assignment
Asset Relationship	Asset Relationship Layout View Assignment	Payment	Payment Layout View Assignment
Asset State Period	Asset State Period Layout View Assignment	Payment Authorization	Payment Authorization Layout View Assignment
Assigned Resource	Assigned Resource Layout View Assignment	Payment Authorization Adjustment	Payment Authorization Adjustment Layout View Assignment
Associated Location	Associated Location Layout View Assignment	Payment Gateway	Payment Gateway Layout View Assignment
Async Operation Log	Async Operation Log Layout View Assignment	Payment Gateway Log	Payment Gateway Log Layout View Assignment
Authorization Form	Authorization Form Layout View Assignment	Payment Group	Payment Group Layout View Assignment

Permission Set: Permission Sets in medical inventory management are used to give additional access to users without changing their profile. They allow specific staff to perform extra tasks like updating stock, approving purchase orders, or viewing reports when needed.



The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: Setup, Home, Object Manager, Hyperforce Assistant, Users, Permission Set Groups, **Permission Sets**, Apps, Mobile Apps, Salesforce, Mobile Builder for the Seller-Focused Experience, Feature Settings, Digital Experiences, Salesforce CMS, Settings, Functions, Sales, Accounts, Person Accounts, Salesforce Scheduler, Assignment Policies, Salesforce Scheduler Settings, Scheduling Policies, Skills, Troubleshooter, Service, Omni-Channel, Supervisor, Supervisor Configurations, Supervisor Settings, Process Automation, Automation Home (Beta), Flows, Migrate to Flow, Next Best Action, Paused And Failed Flow Interviews, Process Builder, and User Interface.

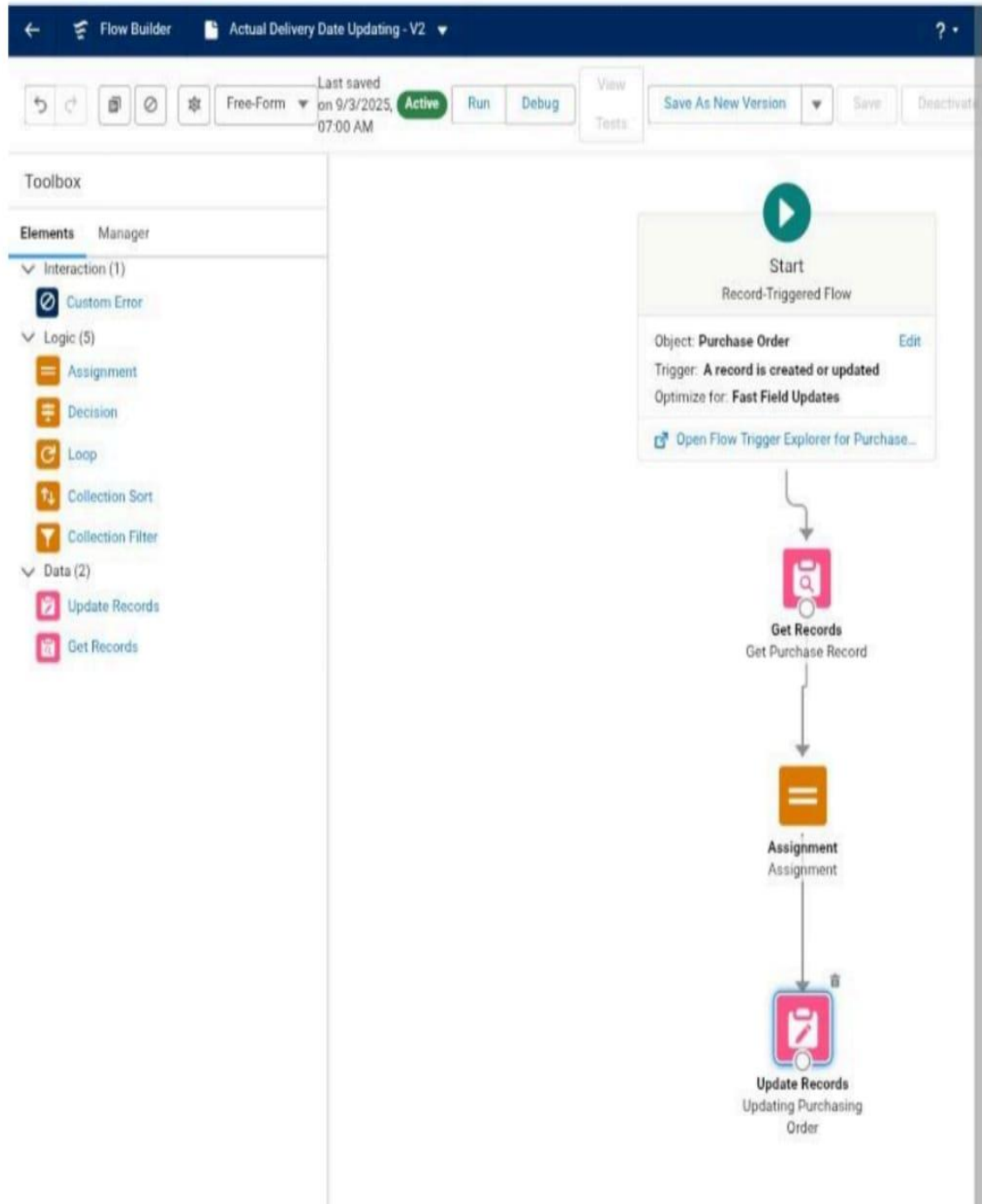
The main content area is titled "Permission Sets" and includes a search bar, a "New" button, and a table of permission sets. The table has the following columns: Action, Permission Set Name, Description, and License.

Action	Permission Set Name	Description	License
<input type="checkbox"/> Clone	/f/ogacv/Data Cloud Data Aware Specialist	This Data Cloud permission set will be deprec...	Customer Data Platform
<input type="checkbox"/> Clone	/f/ogacv/Data Cloud Marketing Admin	Allows access to Data Cloud Setup if the user L...	Customer Data Cloud for Marketin
<input type="checkbox"/> Clone	/f/ogacv/Data Cloud Marketing Manager	This Data Cloud permission set will be deprec...	Customer Data Platform
<input type="checkbox"/> Clone	/f/ogacv/Data Cloud Marketing Specialist	This Data Cloud permission set will be deprec...	Customer Data Platform
<input type="checkbox"/> Clone	/f/ogacv/Data Cloud for Marketing Data Aware	This Data Cloud permission set will be deprec...	Customer Data Cloud for Marketin
<input type="checkbox"/> Clone	/f/ogacv/Data Cloud for Marketing Manager	This Data Cloud permission set will be deprec...	Customer Data Cloud for Marketin
<input type="checkbox"/> Clone	/f/ogacv/Data Cloud for Marketing Specialist	This Data Cloud permission set will be deprec...	Customer Data Cloud for Marketin
<input type="checkbox"/> Clone	Access Agentforce Default Agent	Gives users access to the default Agentforce a...	Agentforce (Default)
<input type="checkbox"/> Clone	Agent Platform Builder	Allow access to agent platform.	Agent platform builder
<input type="checkbox"/> Clone	Agentforce Default Admin	Allows users to build and manage in-org copil...	Agentforce (Default)
<input type="checkbox"/> Clone	Agentforce Service Agent Configuration	Build and manage autonomous AI service age...	Agentforce Service Agent Builder
<input type="checkbox"/> Clone	Agentforce Service Agent Object Access	Access knowledge articles and manage cases ...	Agentforce Service Agent User
<input type="checkbox"/> Clone	Agentforce Service Agent Secure Base	Set up and use Agentforce Service Agent act...	Agentforce Service Agent User
<input type="checkbox"/> Clone	Agentforce Service Agent User	Analyze topics and perform actions as an auto...	Agentforce Service Agent User
<input type="checkbox"/> Clone	Authenticated Payer	An authenticated external user with the ability...	Salesforce Payments External
<input type="checkbox"/> Clone	Buyer	Allows access to the store. Lets users see prod...	B2B Buyer Permission Set One Sea
<input type="checkbox"/> Clone	Buyer Manager	Includes all Buyer capabilities, and allows acce...	B2B Buyer Manager Permission Set
<input type="checkbox"/> Clone	C360 High Scale Flow Integration User	Allows integration user to access features spe...	Cloud Integration User
<input type="checkbox"/> Clone	CRM User	Denotes that the user is a Sales Cloud or Serv...	CRM User
<input type="checkbox"/> Clone	Code Builder User	Enables the user to create and access Code B...	Code Builder
<input type="checkbox"/> Clone	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set 1
<input type="checkbox"/> Clone	Commerce Session	Allow access to session-based permissions.	Commerce Session Permission Set
<input type="checkbox"/> Clone	ConnectivityServiceASCPermSet		Cloud Integration User
<input type="checkbox"/> Clone	Contact Center Admin	Manage Service Cloud Voice contact centers L...	Service Cloud Voice User
<input type="checkbox"/> Clone	Contact Center Admin (Partner Telephony)	Manage Service Cloud Voice contact centers L...	Service Cloud Voice User (Partner

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3



Apex Trigger: Auto-calculate total cost from Order Items.

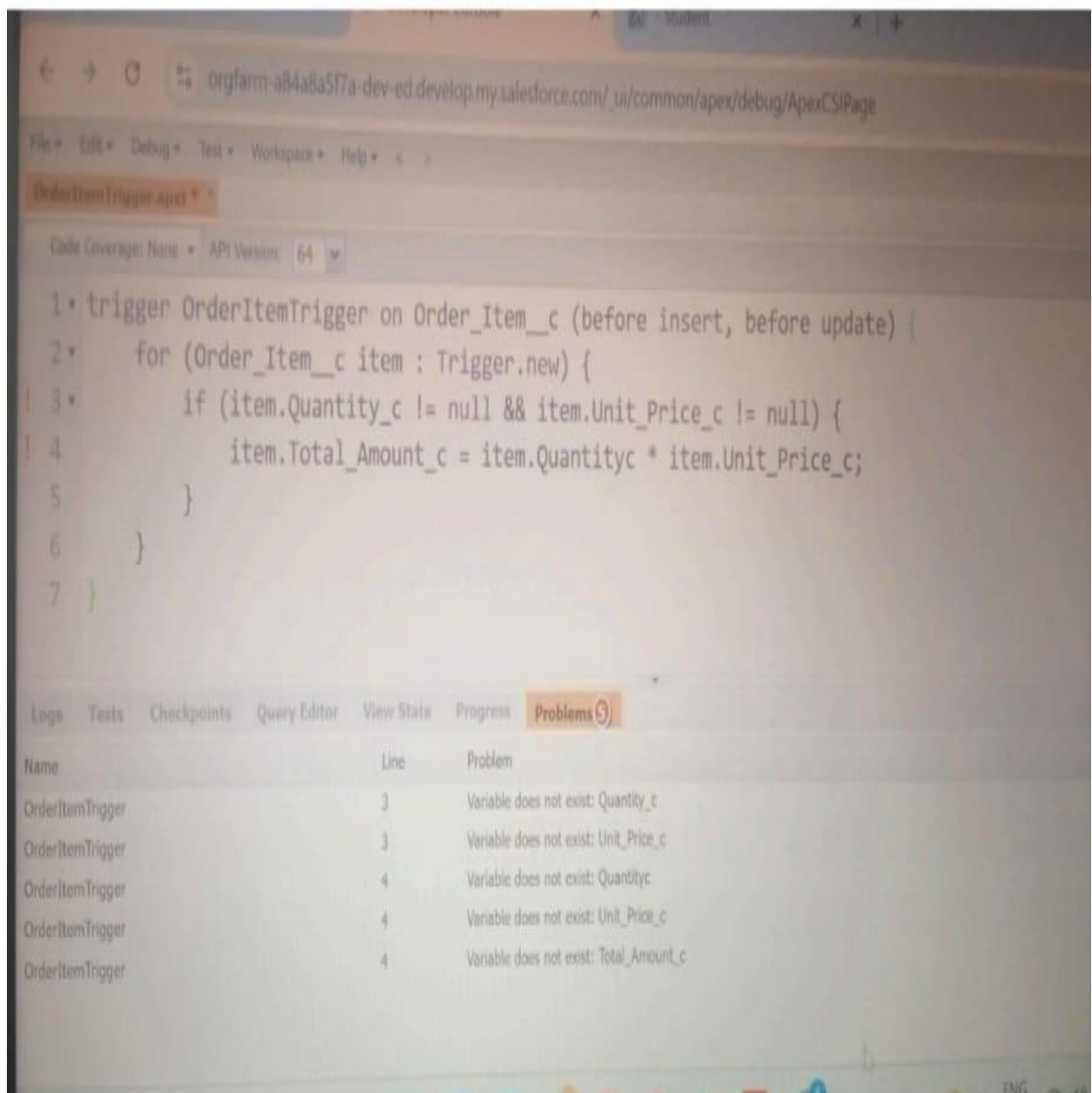
```

File • Edit • Debug • Test • Workspace • Help •
CalculateTotalAmountTrigger.apex • CalculateTotalAmountHandler.apex •
Code Coverage: None • API Version: 64 • Go To

1 • public class CalculateTotalAmountHandler {
2
3
4
5     // Method to calculate the total amount for Purchase Orders based on related Order Items
6
7 •   public static void calculateTotal(List<Order_Item__c> newItem, List<Order_Item__c> oldItem) {
8
9
10
11     // Collect Purchase Order IDs affected by changes in Order_Item__c records
12
13     Set<Id> parentIds = new Set<Id>();
14
15
16
17     // For insert, update, and undelete scenarios
18
19 •   if (isInsert || isUpdate || isUndelete) {
20
21 •       for (Order_Item__c ordItem : newItem) {
22
23           parentIds.add(ordItem.Purchase_Order_Id__c);
24
25       }
26
27   }
28
29
30
31     // For update and delete scenarios
32
33 •   if (isUpdate || isDelete) {
34
35 •       for (Order_Item__c ordItem : oldItem) {
36
37           parentIds.add(ordItem.Purchase_Order_Id__c);
38
39       }
40
41   }
42
43
44
45     // Calculate the total amounts for affected Purchase Orders
46
47     Map<Id, Decimal> purchaseToUpdateMap = new Map<Id, Decimal>();
48
49
50
51 •   if (!parentIds.isEmpty()) {
52
53       // Perform an aggregate query to sum the Amount__c for each Purchase Order
54
55 •       List<AggregateResult> aggrList = [

```

Error Handling: Resolved issues like “field not writable” and “no records found” by modifying field accessibility and report filters.



3. FUNCTIONAL AND PERFORMANCE TESTING

Tested formula fields to ensure automatic total calculation.

Verified report filters to display correct purchase order data.

Simulated user errors such as entering invalid quantity or cost.

Checked dashboard visualizations with multiple test purchase orders.

4. RESULTS

Output screenshots (to be inserted):

Report: Purchase Orders by Supplier.

The screenshot displays a web application interface for managing purchase orders. The background shows a 'Purchase Orders' list with 5 items (P0001 to P0005). The foreground shows a 'New Purchase Order' form with the following fields:

- Purchase Order ID:** P0001
- Supplier ID:** SUP-001
- Order Date:** 9/5/2025 (Format: 12/31/2024)
- Expected Delivery Date:**
- Actual Delivery Date:**
- Total Order Cost:**

Buttons at the bottom: Cancel, Save & New, Save.

5. ADVANTAGES & DISADVANTAGES

Advantages

- 1) Centralized tracking of medical supplies.
- 2) Automated calculation of total costs.
- 3) Supplier-based analysis for better procurement decisions.
- 4) Improved accuracy through validations.

Disadvantages

- 1) Initial setup requires technical knowledge.
- 2) Dependent on Salesforce access and customization.

6. CONCLUSION

The Medical Inventory Management System successfully provides an organized solution for managing medical supplies. By automating purchase orders, inventory tracking, and report generation, it reduces manual errors, improves transparency, and enhances efficiency for healthcare organizations.

7. APPENDIX

Sample Code Snippet – Apex Trigger for Total Order Cost

trigger CalculateTotalCost on Order_Item__c (after insert, after update, after delete) {

Map<Id, Decimal> purchaseToUpdateMap = new Map<Id, Decimal>();

If (Trigger.isInsert || Trigger.isUpdate) {

for (Order_Item__c item: Trigger.new) {

purchaseToUpdateMap.put(item.Purchase_Order__c,


```

purchaseToUpdateMap.get(item.Purchase_Order__c) == null?
item.Quantity__c * item.Price__c:
purchaseToUpdateMap.get(item.Purchase_Order__c) +
(item.Quantity__c * item.Price__c));
}
}

```

```

If (Trigger.isDelete) {
for (Order_Item__c item: Trigger.old) {
purchaseToUpdateMap.put(item.Purchase_Order__c,
purchaseToUpdateMap.get(item.Purchase_Order__c) == null?
0 - (item.Quantity__c * item.Price__c):
purchaseToUpdateMap.get(item.Purchase_Order__c) -
(item.Quantity__c * item.Price__c));
}
}

List<Purchase_Order__c> updateList = new List<Purchase_Order__c>
();

For (Id pold : purchaseToUpdateMap.keySet()) {
updateList.add(new Purchase_Order__c(Id = pold,
Total_Order_Cost__c = purchaseToUpdateMap.get(pold)));
}

update update List;
}

```

