

MEDICAL INVENTORY MANAGEMENT

College Name: SRI KRISHNA ADITHYA COLLEGE OF ARTS AND SCIENCE

College Code: ASBRUAG

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1. INTRODUCTION

1.1 Project Overview

This project is a comprehensive Salesforce application to streamline and manage various operational aspects of medical inventory. The system aims to efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor the expiry dates of products. Maintain detailed records of suppliers, including contact information. Catalog product information, including descriptions, stock levels. Monitor and track product expiry dates to avoid using expired items. Comprehensive reports to track supplier performance, and purchase orders.

1.2 Purpose

The main objective of the Medical Inventory Management System is to enable medical organizations to efficiently manage suppliers, purchase orders, product inventory, and expiry monitoring. It reduces manual effort, improves data accuracy, enhances operational efficiency, and ensures better tracking of inventory and supplier performance.



2. DEVELOPMENT PHASE

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| | |
|---|---|
| First name | Last name |
| <input type="text" value="aaqil"/> | <input type="text" value="ashath"/> |
| Job title | Work email |
| <input type="text" value="student"/> | <input type="text" value="23bsai101aaqilashath"/> |
| Company | Country/Region |
| <input type="text" value="sri krishna adithya co"/> | <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.

We value your privacy. To learn more, visit our [Privacy Statement](#).

2.1 Objects:

- Created objects: Product, Purchase Order, Order Item, Inventory Transaction and Supplier

The screenshot shows the Salesforce Setup interface for the 'Product' object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Product' and has a 'Details' sub-header. It contains several fields: Description, API Name (Product__c), Custom (checked), Singular Label (Product), Plural Label (Products), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner.

The screenshot shows the Salesforce Setup interface for the 'Purchase Order' object. The left sidebar contains a 'Details' menu with options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Purchase Order' and has a 'Details' sub-header. It contains several fields: Description, API Name (Purchase_Order__c), Custom (checked), Singular Label (Purchase Order), Plural Label (Purchase Orders), Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). There are 'Edit' and 'Delete' buttons in the top right corner.

Setup

Home

Object Manager

Q: Search Setup

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

Details

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

Edit

Delete

Setup

Home

Object Manager

Q: Search Setup

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

Details

Description

API Name

Inventory_Transaction__c

Custom

✓

Singular Label

Inventory Transaction

Plural Label

Inventory Transactions

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

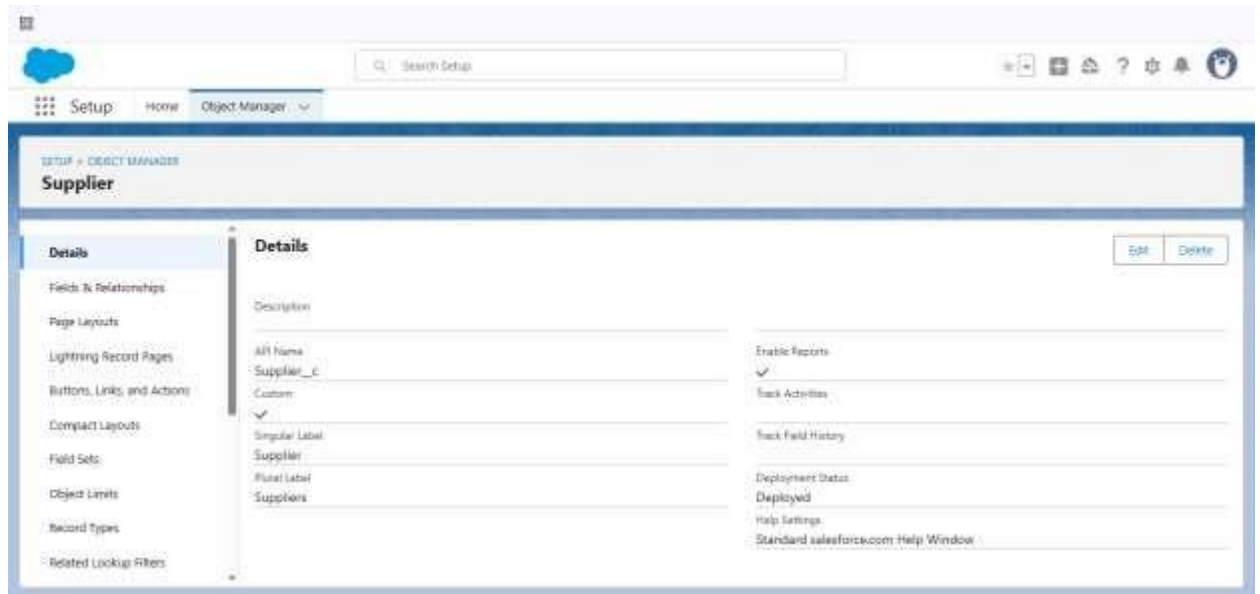
Deployed

Help Settings

Standard salesforce.com Help Window

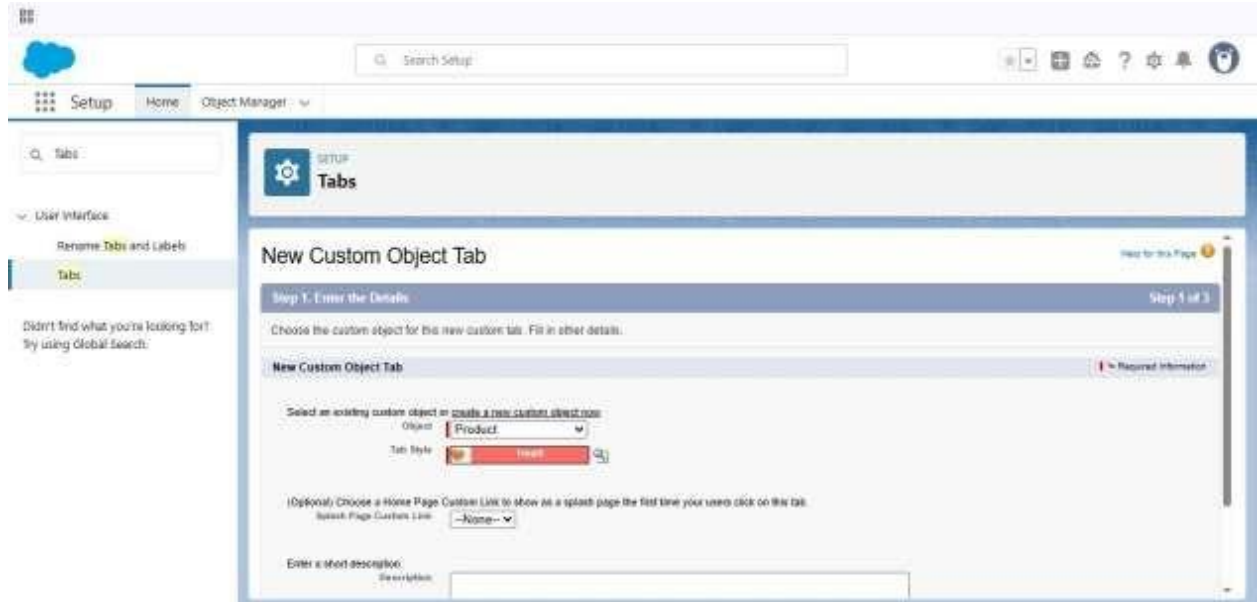
Edit

Delete



2.2 Tabs:

- Creating Tabs for created objects:

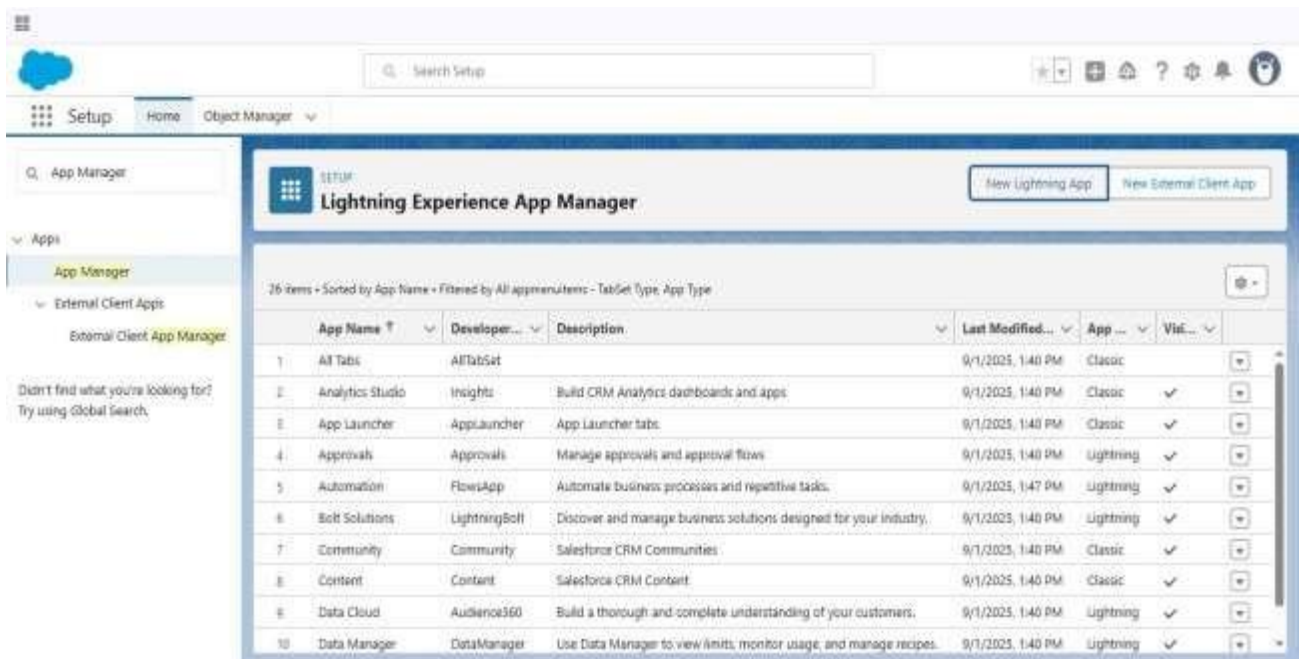




Creating the Tabs for the remaining Objects same like this process, they are “Purchase Order, Order Item, Inventory Transaction, and Supplier”.

2.3 The Lightning App:

- Create a Lightning App for Medical Inventory Management:



Search Setup

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ

Medical Inventory Management


* Developer Name ⓘ

Medical_Inventory_Management

Description ⓘ

App Branding

Image ⓘ



Primary Color Hex Value ⓘ

#0070C2

Next

| | | | | | |
|--------------|-------------|---|-------------------|-----------|---|
| Data Cloud | Audience360 | Build a thorough and complete understanding of your customers. | 8/1/2023, 1:40 PM | Lightning | ✓ |
| Data Manager | DataManager | Use Data Manager to view limits, monitor usage, and manage recipes. | 8/1/2023, 1:40 PM | Lightning | ✓ |

Search Setup

New Lightning App

Available Items

Create

Search

Selected Items

Products

Purchase Orders

Order Items

Inventory Transactions

Suppliers

Reports

Dashboards

Back

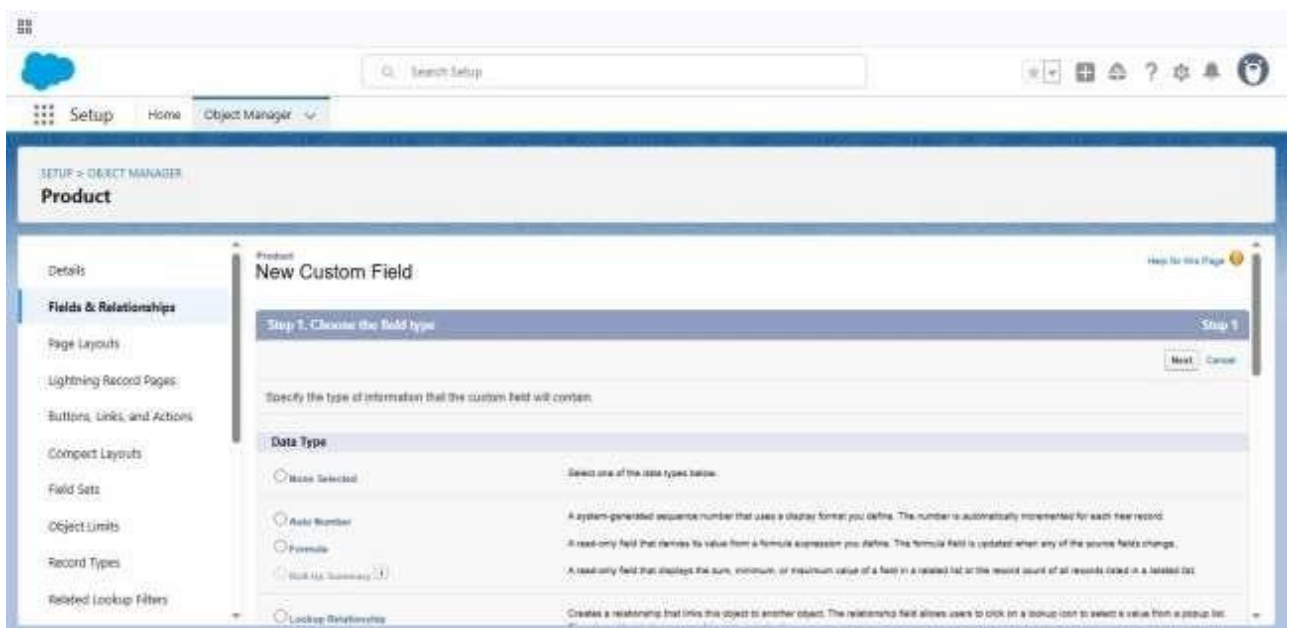
Next

| | | | | | |
|--------------|-------------|---|-------------------|-----------|---|
| Data Cloud | Audience360 | Build a thorough and complete understanding of your customers. | 8/1/2023, 1:40 PM | Lightning | ✓ |
| Data Manager | DataManager | Use Data Manager to view limits, monitor usage, and manage recipes. | 8/1/2023, 1:40 PM | Lightning | ✓ |



2.4 Fields:

- Creating a Text (“Product Name”), Text Area (“Product Description”), Number (“Current Stock Level”), Currency (“Unit Price”) Fields in Product Object:



Setup

Home

Object Manager

Search Setup

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

Product

New Custom Field

Help for this Page

Step 2 of 4

Step 2. Enter the details

PreviousNextCancel

Field LabelProduct Name

Please enter the maximum length for a text field below.

Length225

Field NameProduct_Name

Description

Help Text

Required☒ Always require a value in this field in order to save a record.

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Product

Details

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Buttons, Links, and Actions

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Object Limits

Record Types

Related Lookup Filters

Product

New Custom Field

Help for this Page

Step 2 of 4

Step 2. Enter the details

PreviousNextCancel

Field LabelProduct Description

Field NameProduct_Description

Description

Help Text

Required☐ Always require a value in this field in order to save a record.

Auto add to custom report type☒ Add this field to existing custom report types that contain this entity.

Setup

Home

Object Manager

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Setup > OBJECT MANAGER

Product

Details

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Record Types

Related Lookup Filters

Product

New Custom Field

Help for this Page

Step 2: Enter the details

Step 2 of 4

Previous

Next

Cancel

Field Label

Current Stock Level

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length

18

Decimal Places

0

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Field Name

Current_Stock_Level

Description

Help Text

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Product

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Buttons, Links, and Actions

Compact Layouts

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Object Limits

Record Types

Related Lookup Filters

Product

New Custom Field

Help for this Page

Step 2: Enter the details

Step 2 of 4

Previous

Next

Cancel

Field Label

Unit Price

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length

16

Decimal Places

2

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Field Name

Unit_Price

Description

Help Text

- Creating a Lookup Relationship (“Supplier ID”), Date Field (“ Order Date”), Roll-up Summary Field (“Order Count”) in Purchase Order Object:

The screenshot shows the Salesforce Setup interface for the Purchase Order object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Purchase Order' and 'New Custom Field'. It displays 'Step 1: Choose the field type' with a 'Next' button. Below this, it asks to 'Specify the type of information that the custom field will contain.' A table lists four data types: 'None Selected' (selected), 'Auto Number', 'Formula', and 'Roll-Up Summary'. Each type has a brief description. At the bottom, there is a 'Lookup Relationship' option with a description.

| Data Type | Description |
|--|--|
| <input checked="" type="radio"/> None Selected | Select one of the data types below. |
| <input type="radio"/> Auto Number | A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record. |
| <input type="radio"/> Formula | A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change. |
| <input type="radio"/> Roll-Up Summary | A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list. |

[Lookup Relationship](#) Create a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a lookup list.

The screenshot shows the Salesforce Setup interface for the Purchase Order object, continuing from the previous step. The left sidebar is the same. The main content area is titled 'Purchase Order' and 'New Relationship'. It displays 'Step 2: Choose the related object' with 'Previous', 'Next', and 'Cancel' buttons. It asks to 'Select the other object to which this object is related.' Below this, there is a 'Related To' dropdown menu with 'Supplier' selected. At the bottom, there are 'Previous', 'Next', and 'Cancel' buttons.

Related To: Supplier

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

Order Item

New Custom Field

Step 3 of 5: Define the summary calculation

Select Object to Summarize

Master Object: Purchase Order

Summarized Object: Order Items

Select Roll-Up Type

☒ COUNT

☐ SUM

☐ MIN

☐ MAX

Field to Aggregate:

Filter Criteria:

Previous Next Cancel

Help for this Page

- Creating a Unit Price Formula (“Unit Price”), Amount Formula (“Amount”)Fields in Order Item Object:

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

Order Item

New Custom Field

Step 1 of 1: Choose the field type

Specify the type of information that the custom field will contain.

Data Type

☐ None Selected

☐ Auto Number

☒ Formula

☐ Roll-Up Summary

☐ Lookup Relationship

Select one of the data types below:

A system-generated sequence number that takes a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list.

Next Cancel

Help for this Page

Setup

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Object Manager

Search Setup

Setup > OBJECT MANAGER

Order Item

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Related Lookup Filters

Order Item

New Custom Field

Help for this Page

Step 2: Choose output type

Step 2 of 3

Previous

Next

Cancel

Field Label: Unit Price

Field Name: Unit Price

Auto-add to existing report type: ☒ Add this field to existing custom report types that contain this entity.

Formula Return Type

☐ None Selected

Select one of the data types below:

☐ Checkbox

Calculate a boolean value.
Example: `TODAY() < CloseDate`

☒ Currency

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin + Amount - Cost_c`

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

Order Item

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Fields & Relationships

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Record Types

Related Lookup Filters

Order Item

New Custom Field

Help for this Page

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula button to use additional fields, operators, and functions.

Example: `Gross Margin + Amount - Cost_c` [More Examples...](#)

Simple Formula

Advanced Formula

Unit Price (Currency) =

Product__r.Unit_Price__c

Insert Field

Insert Operator

Functions

All Function Categories

ABS

ACOS

ADDMONTHS

AND

ASCII

ASIN

Insert Selected Function

Quick Tips

• Define Selects

• Operators & Functions

[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](#)

Order Item

New Custom Field

Help for this Page

Step 2 of 5

Previous Next Cancel

Field Label: label Amount

Field Name: label_Amount

☐ Auto add to custom report type
 ☒ Add this field to existing custom report types that contain this entity

Formula Return Type

☐ None Selected
 ☐ Checkbox
 ☒ Currency

Select one of the data types below:

 Calculate a boolean value.
 Example: `{TODAY()} < CloseDate`

 Calculate a dollar or other currency amount and automatically format the field as a currency amount.
 Example: `{Gross Margin > Amount} / Cost__c`

[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](#)

Order Item

New Custom Field

Help for this Page

Step 3 of 5

Previous Next Cancel

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: `{Gross Margin > Amount} / Cost__c`
[More Examples...](#)

Simple Formula

Advanced Formula

Insert Field

Insert Operator

label Amount (Currency) =

Quantity_Received__c * Unit_Price__c

Functions

-- All Function Categories --
 ABS
 ACOS
 ADDMONTHS
 AND
 ASCII
 ASIN

Quick Tip

- Get the Started
- Operators & Functions

- Creating a Picklist Field (“Transaction Type”), Total Order Cost Formula Field (“Total Order Cost”) in Inventory Transaction Object:

The screenshot shows the Salesforce Setup interface for the 'Inventory Transaction' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'New Custom Field' and is at 'Step 1: Choose the field type'. It prompts the user to 'Specify the type of information that the custom field will contain'. Under the 'Data Type' section, there are four radio button options: 'None Selected' (selected), 'Auto Number' (described as a system-generated sequence number), 'Formula' (described as a read-only field derived from a formula), and 'Roll-Up Summary' (described as a read-only field displaying summary values). A 'Lookup Relationship' option is also visible at the bottom.

The screenshot shows the 'New Custom Field' wizard at 'Step 2: Enter the details'. The 'Field Label' is set to 'Transaction Type'. Under the 'Values' section, the 'Use global picklist value set' radio button is selected. Below it, there is a text input field containing the values 'Receipt', 'Issue', and 'Adjustment', separated by new lines. At the bottom, there is a checkbox labeled 'Display values alphabetically, not in the order entered', which is currently unchecked. Navigation buttons 'Previous', 'Next', and 'Cancel' are visible at the top right of the step.

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

New Custom Field

Step 2 of 5: Choose output type

Field Label: Field Name:

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Formula Return Type

☐ Number Select one of the data types below:

☐ Checkbox

☒ Currency

Calculate a boolean value.
Example: `TODAY() < CloseDate`

Calculate a dollar or other currency amount and automatically format the text as a currency amount.
Example: `GrossMargin * Amount / Cost__c`

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

New Custom Field

Step 3 of 5: Enter formula

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula button to use additional fields, operators, and functions.

Example: `GrossMargin * Amount / Cost__c` [More Examples...](#)

`Total_Order_Cost__Currency =`
`Purchase_Order__s.Total_Order_Cost__c`

Functions
 -- All Function Categories --
 ABS
 ACOS
 ADDMONTHS
 AND
 ASCII
 ASIN

Quick Tips

- Getting Started
- Operators & Functions

- Creating a Phone (“ Phone Number”), Email (“Email”) Fields in Supplier Object:

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

Supplier
New Custom Field

Step 1: Choose the field type Step 1

Specify the type of information that the custom field will contain

Data Type

☐ None Selected Select one of the data types below

☐ Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list.

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

Supplier
New Custom Field

Step 2: Enter the details Step 2 of 4

Field Label (*)

Field Name (*)

Description

Help Text

Required ☒ Always require a value in this field in order to save a record

Auto add to standard report type ☒ Add this field to existing custom report types that contain this entity (*)

The screenshot shows the Salesforce Setup interface for the 'Supplier' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'New Custom Field' and 'Step 2: Enter the details'. It includes a 'Field Label' field with 'Email' entered, a 'Field Name' field with 'Email' entered, a 'Description' field, and a 'Help Text' field. At the bottom, there are checkboxes for 'Required', 'Unique', and 'External ID', each with a corresponding description.

Supplier
New Custom Field

Step 2: Enter the details

Field Label: Email

Field Name: Email

Description:

Help Text:

Required: ☐ Always require a value in this field in order to save a record

Unique: ☐ Do not allow duplicate values

External ID: ☐ Set this field as the external system identifier from an external system

2.5 Editing of Page Layouts:

- To edit a page Layout in Product object:

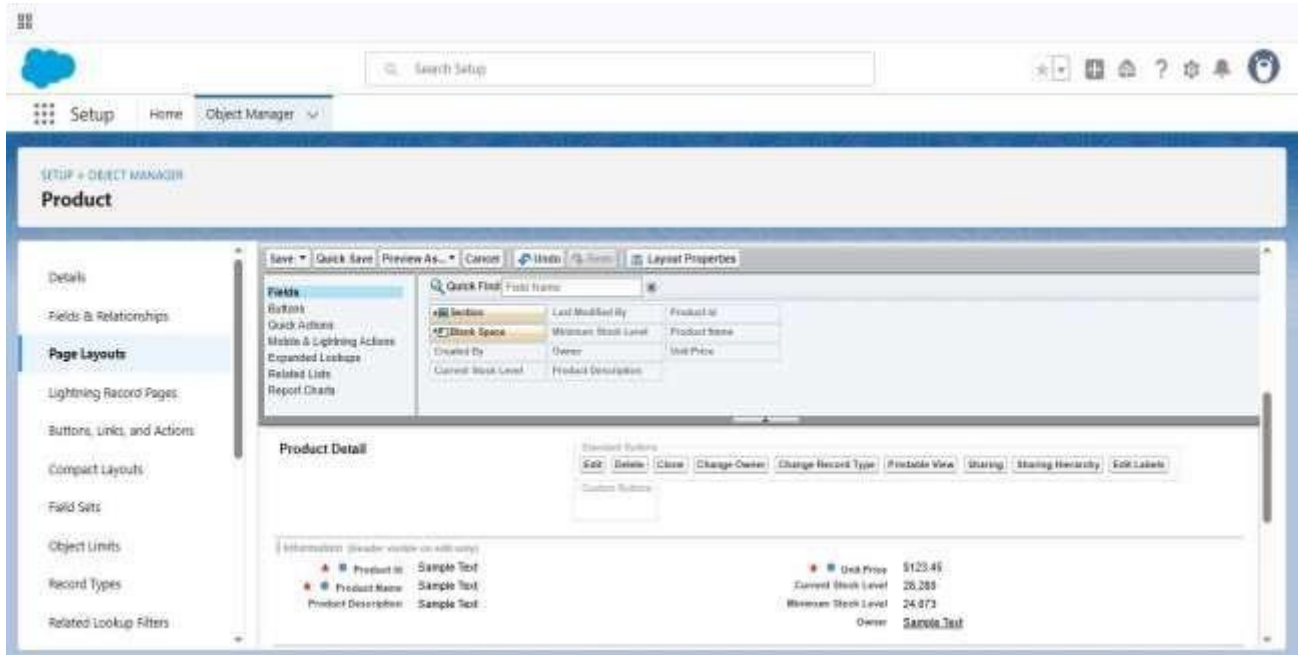
The screenshot shows the Salesforce Setup interface for the 'Product' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Page Layouts' and shows a table with one item, 'Product Layout'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. There are buttons for 'Quick Find', 'New', and 'Page Layout Assignment'.

Product
Page Layouts

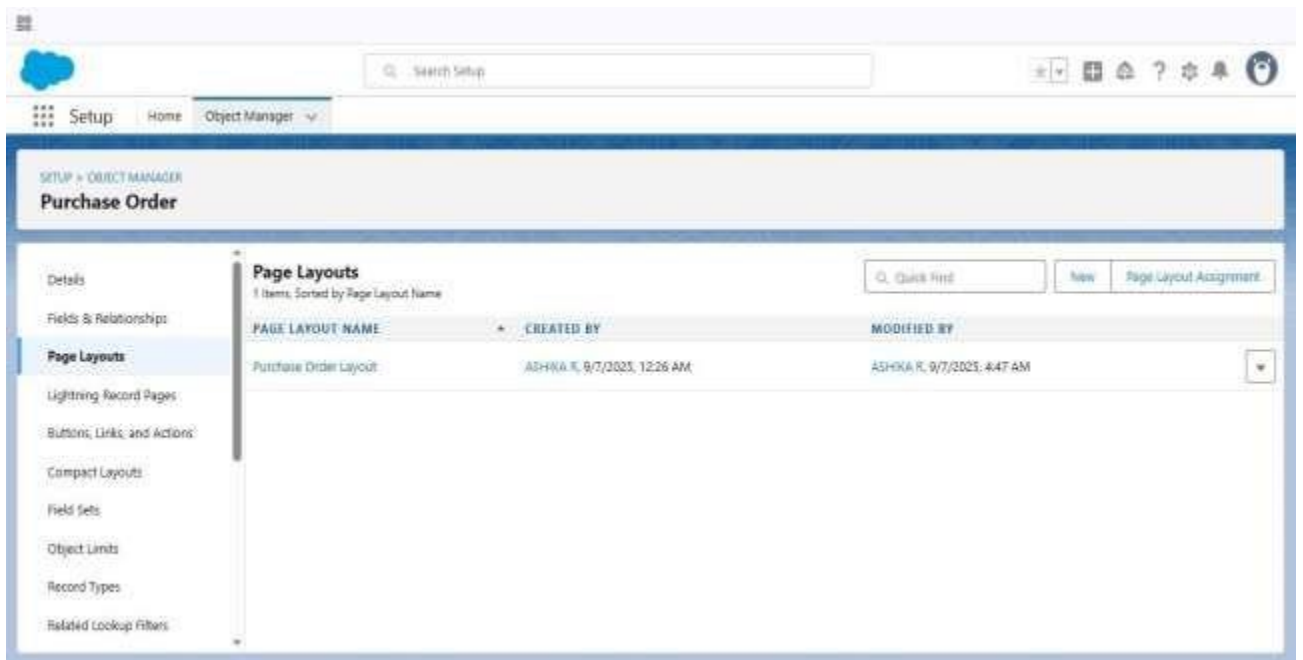
1 items, Sorted by Page Layout Name

Quick Find New Page Layout Assignment

| PAGE LAYOUT NAME | CREATED BY | MODIFIED BY |
|------------------|------------------------------|-----------------------------|
| Product Layout | ASHOKA R, 5/7/2023, 12:07 AM | ASHOKA R, 5/7/2023, 2:20 AM |



- To edit a page Layout in Purchase Order object:



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

Save | Quick Save | Preview As... | Cancel | Print | Fields | Layout Properties

Fields

Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Quick Find

| | |
|------------------------|-------------------|
| Expected Delivery Date | Owner |
| Last Modified By | Purchase Order Id |
| Actual Delivery Date | Order Count |
| Created By | Supplier Id |
| | Total Order Cost |

Information (header visible on edit only)

| | | | |
|------------------------|-------------|----------------------|-------------|
| Purchase Order Id | Sample Test | Actual Delivery Date | 9/7/2025 |
| Supplier Id | Sample Test | Order Count | 47,187 |
| Order Date | 9/7/2025 | Total Order Cost | \$78.85 |
| Expected Delivery Date | 9/7/2025 | Owner | Sample Test |

System Information (header visible on edit only)

| | | | |
|------------|-------------|------------------|-------------|
| Created By | Sample Test | Last Modified By | Sample Test |
|------------|-------------|------------------|-------------|

Custom Links (header visible on edit only)

- To edit a page Layout in Order Item object:

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

Page Layouts

1 item, Sorted by Page Layout Name

Quick Find

New

Page Layout Assignment...

| PAGE LAYOUT NAME | CREATED BY | MODIFIED BY |
|-------------------|------------------------------|-----------------------------|
| Order Item Layout | ASHIKA R, 9/7/2025, 12:27 AM | ASHIKA R, 9/7/2025, 2:28 AM |

Setup Home Object Manager

Search Setup

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

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

Quick Find: Field Name

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Section

Blank Space

Account

Created By

Last Modified By

Order Item M

Product M

Purchase Order M

Quantity Ordered

Quantity Reserved

Unit Price

Information (header visible on edit only)

Order Item Id Sample Text

Amount \$123.45

Purchase Order Id Sample Text

Product details

Product Id Sample Text

Unit Price \$123.45

Quantity Ordered 38.682

Quantity Reserved 937.79

System Information (header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

Custom Links (header visible on edit only)

- To edit a page Layout in Inventory Transaction object:

Setup Home Object Manager

Search Setup

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

Page Layouts

1 Items, Sorted by Page Layout Name

Quick Find

New

Page Layout Assignment

| PAGE LAYOUT NAME | CREATED BY | MODIFIED BY |
|------------------------------|------------------------------|-----------------------------|
| Inventory Transaction Layout | ASHIKA R, 9/7/2025, 12:27 AM | ASHIKA R, 9/7/2025, 4:51 AM |

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

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

Fields

Quick Find:

Section: Last Modified By: Transaction Date: Transaction Type:

Item Name: Item: Transaction Date: Transaction Type:

Created By: Purchase Order ID: Inventory Transaction: Total Order Cost:

Information (header visible on edit only)

| | | | |
|--------------------------|-------------|-------|-------------|
| Inventory Transaction ID | Sample Text | Owner | Sample Text |
| Purchase Order ID | Sample Text | | |
| Transaction Type | Sample Text | | |
| Transaction Date | 9/7/2025 | | |
| Total Order Cost | \$123.45 | | |

System Information (header visible on edit only)

Created By: Sample Text Last Modified By: Sample Text

Custom Links (header visible on edit only)

- To edit a page Layout in Supplier object:

Setup > Object Manager

Supplier

Details

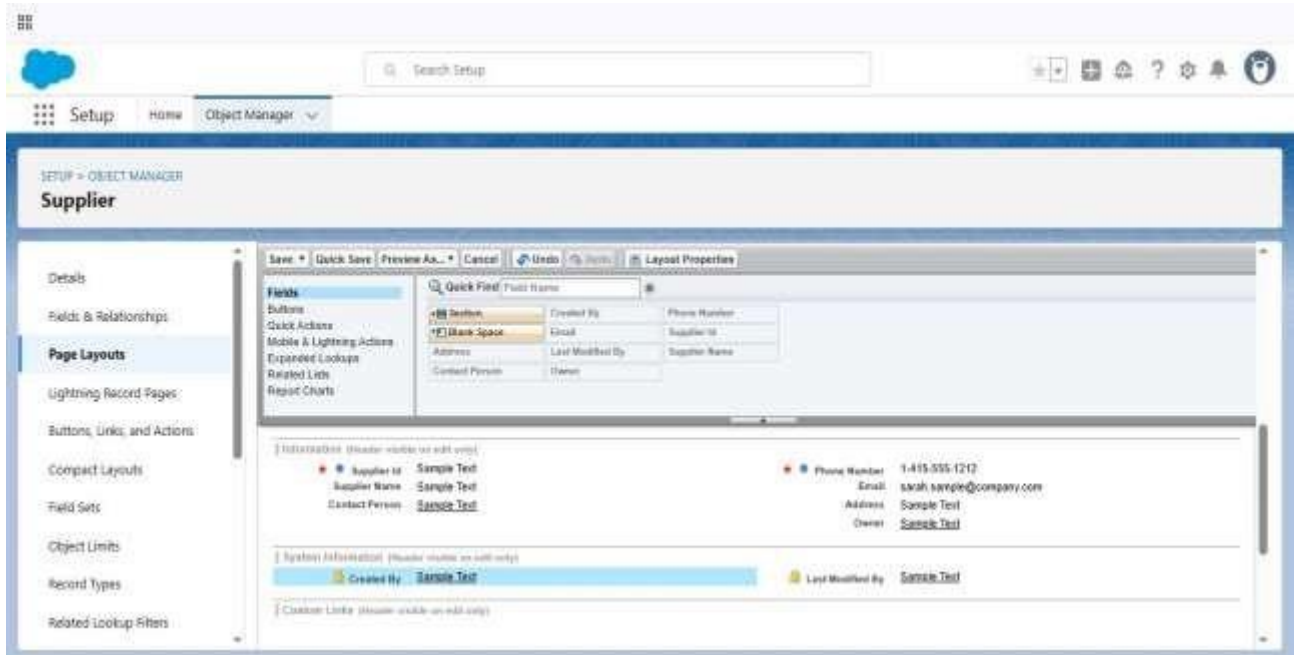
- Fields & Relationships
- Page Layouts**
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters

Page Layouts

1 item, Sorted by Page Layout Name.

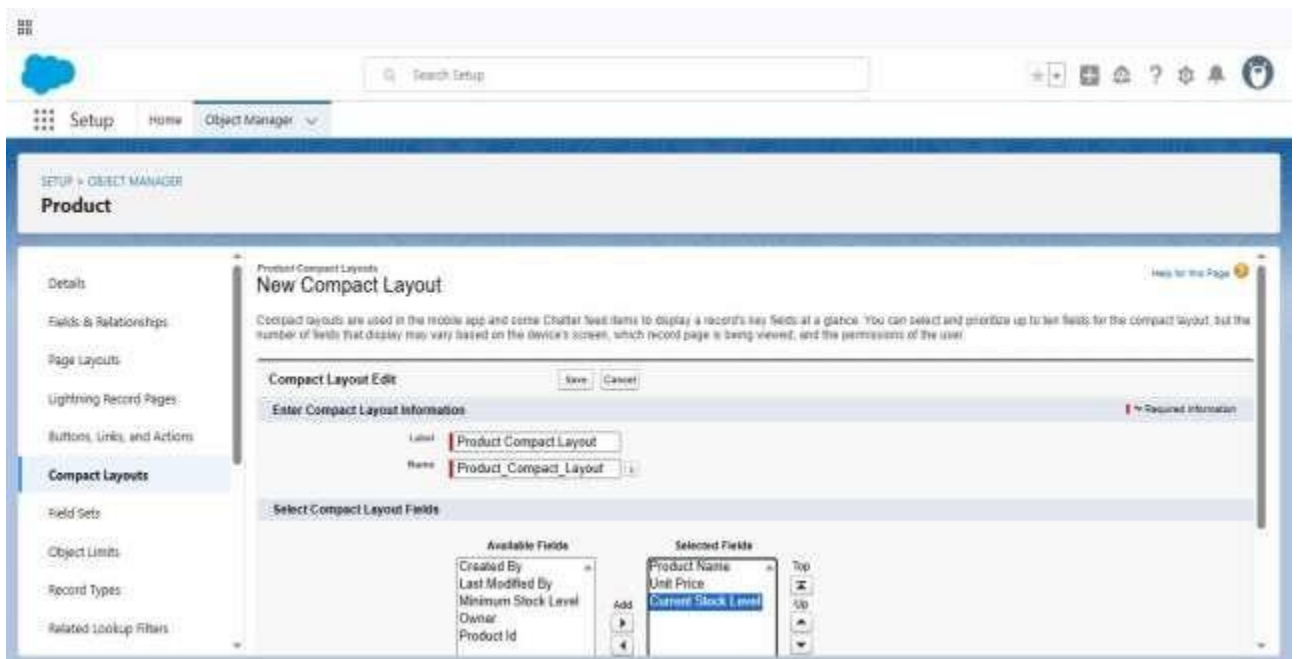
Quick Find: New Page Layout Assignment

| PAGE LAYOUT NAME | CREATED BY | MODIFIED BY |
|------------------------|------------------------------|-----------------------------|
| Supplier object Layout | ASHIKA R, 9/7/2025, 12:28 AM | ASHIKA R, 9/7/2025, 4:54 AM |



2.6 Compact Layouts:

- To Create a Compact Layout to a Product Object:



Setup

Home

Object Manager

Search Setup

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

Product Compact Layouts

Compact Layout Assignment

Back to Product

Edit Assignment

Primary Compact Layout

The primary compact layout defines the fields that display when this object's records appear as list view items in the mobile app.

Primary Compact Layout: System Default

Edit Assignment

Setup

Home

Object Manager

Search Setup

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

Product Compact Layouts

Compact Layout Assignment

Help for this Page

Save Cancel

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

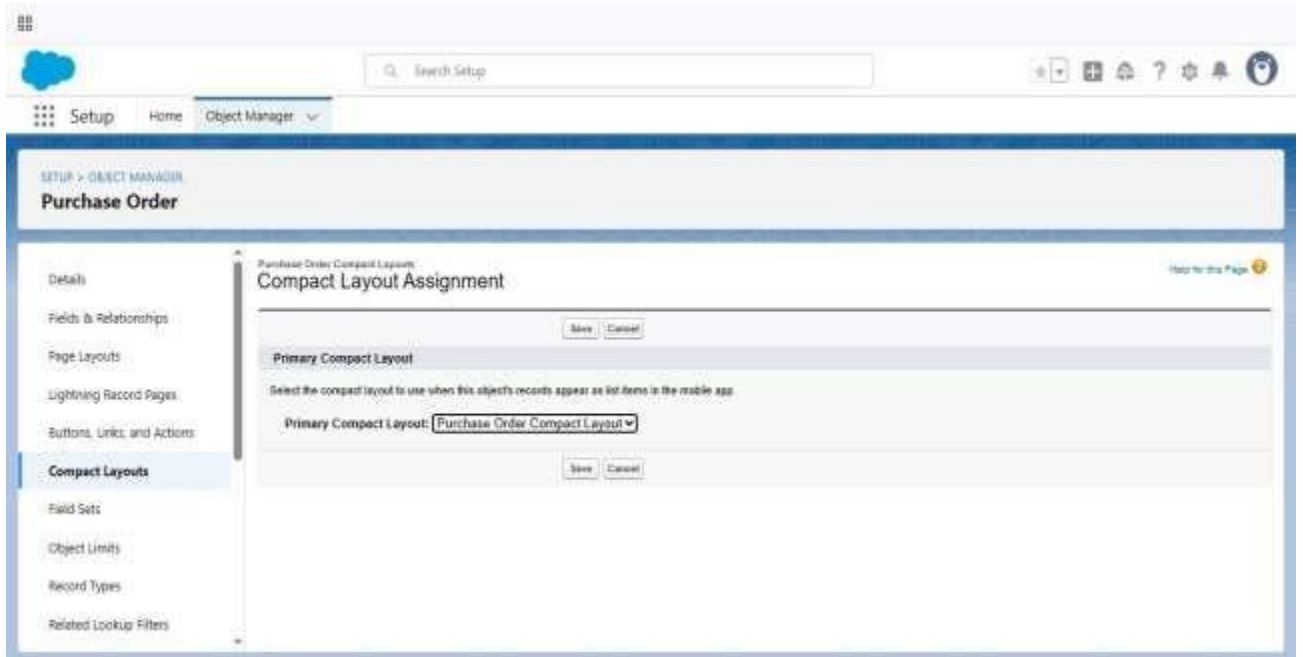
Primary Compact Layout: Product Compact Layout

Save Cancel

- To Create a Compact Layout to a Purchase Order Object:

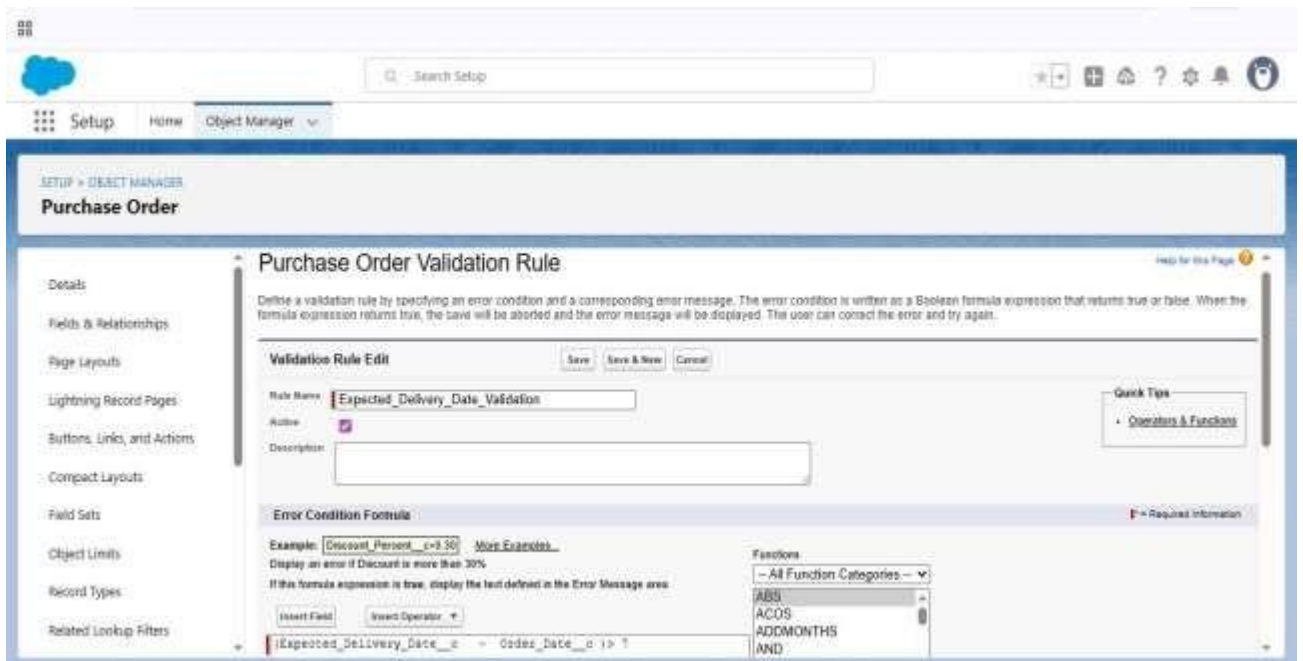
The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts (highlighted), Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Purchase Order Compact Layouts' and 'New Compact Layout'. Below this, there is a 'Compact Layout Edit' section with 'Save' and 'Cancel' buttons. The 'Enter Compact Layout Information' section contains two input fields: 'Label' with the value 'Purchase Order Compact La' and 'Name' with the value 'Purchase_Order_Compact_L'. Below this is the 'Select Compact Layout Fields' section, which includes two columns: 'Available Fields' and 'Selected Fields'. The 'Available Fields' column lists: Actual Delivery Date, Created By, Expected Delivery Date, Last Modified By, Order Count, and Owner. The 'Selected Fields' column lists: Purchase Order Id, Order Date, Total Order Cost, and Supplier ID. There are 'Add' and 'Remove' buttons between the columns, and 'Up' and 'Down' buttons next to the 'Selected Fields' column.

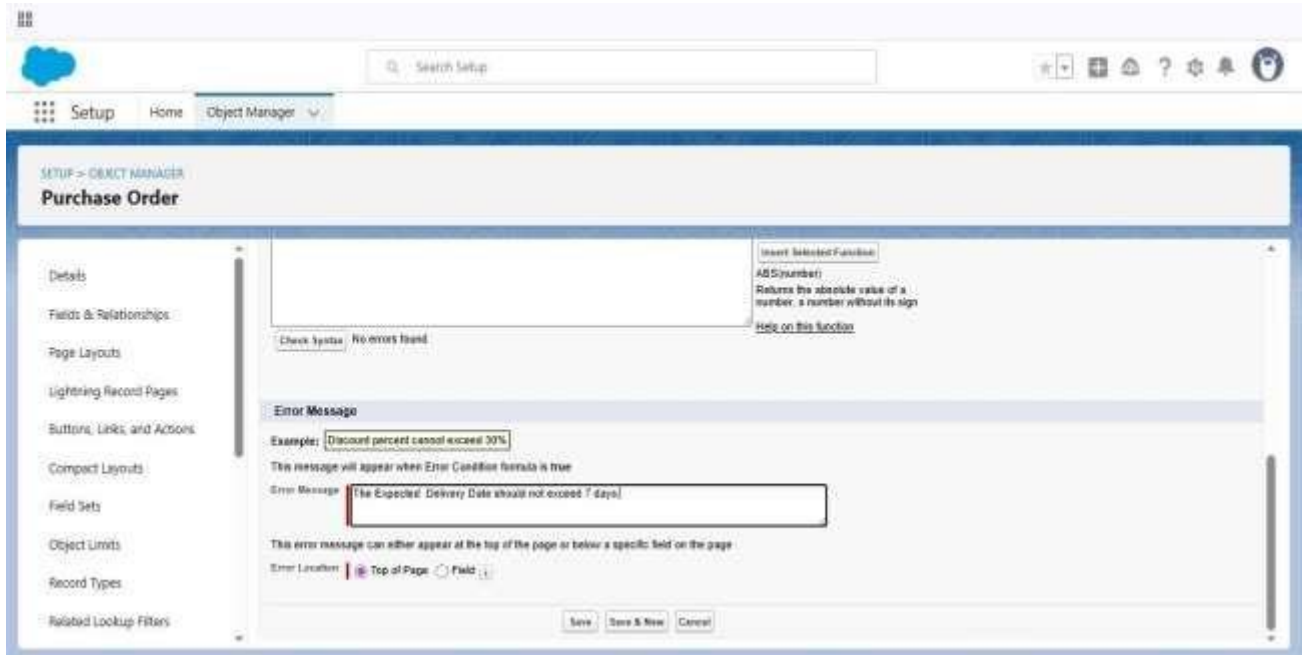
The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts (highlighted), Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Purchase Order Compact Layouts' and 'Compact Layout Assignment'. Below this, there is a 'Primary Compact Layout' section. The 'Primary Compact Layout' section contains a text field with the value 'System Default' and an 'Edit Assignment' button. Above the text field is a 'Back to Purchase Order' link. Below the text field is another 'Edit Assignment' button.



2.7 Validation Rules:

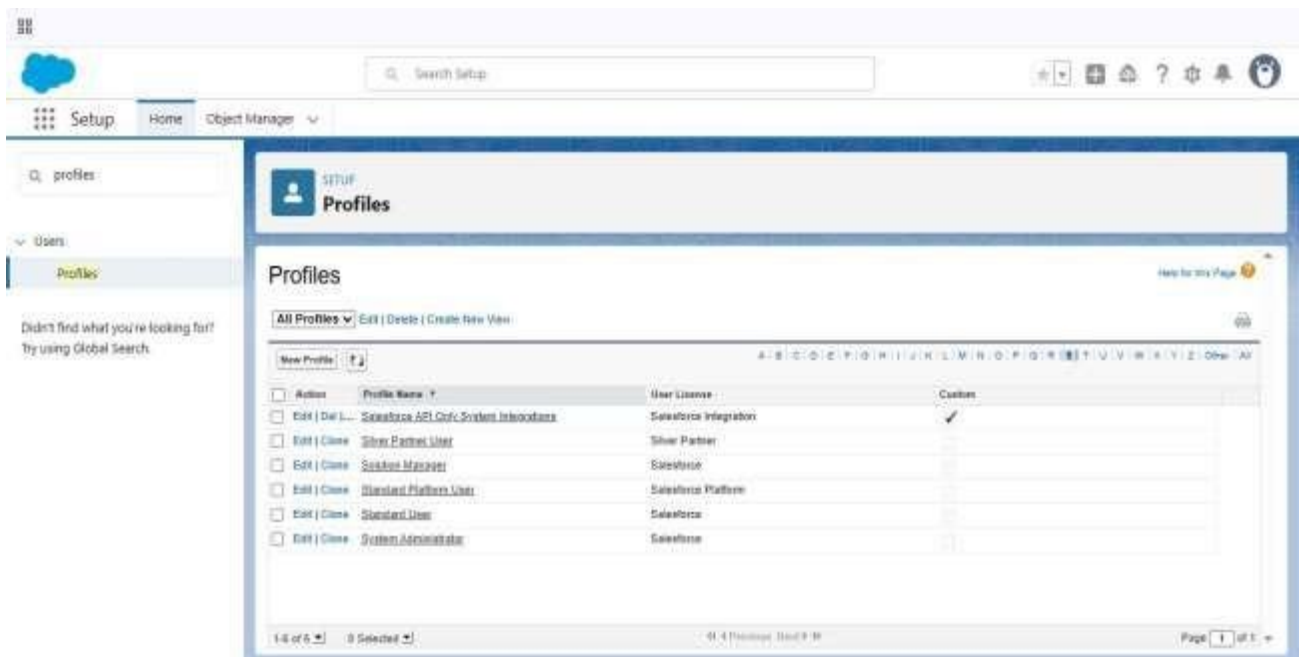
- To Create an Expected Delivery Date Validation Rule to a Employee Object:





2.8 Profiles:

- To Create an Inventory Manager Profile:



Setup

Home

Object Manager

profiles

Users

Profiles

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

Search Setup

Help for this Page

Clone Profile

Enter the name of the new profile

You must select an existing profile to clone from.

Existing Profile

Standard User

User License

Salesforce

Profile Name

Inventory Manager

Save

Cancel

Setup

Home

Object Manager

profiles

Users

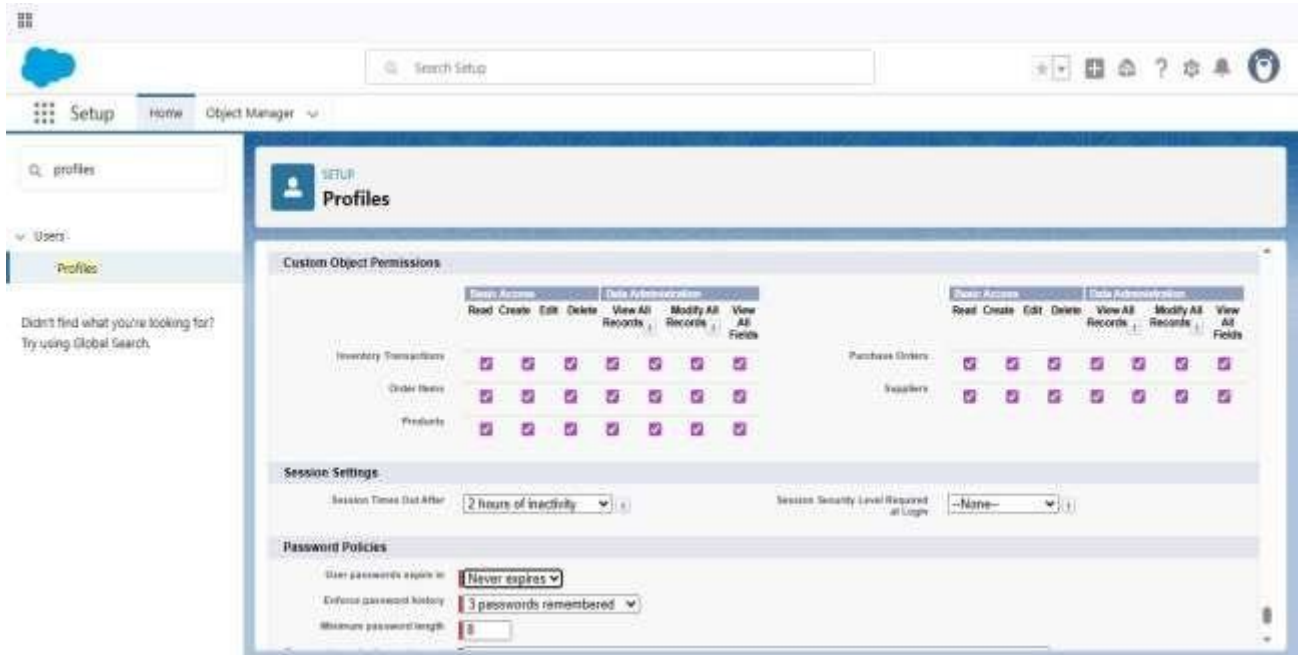
Profiles

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

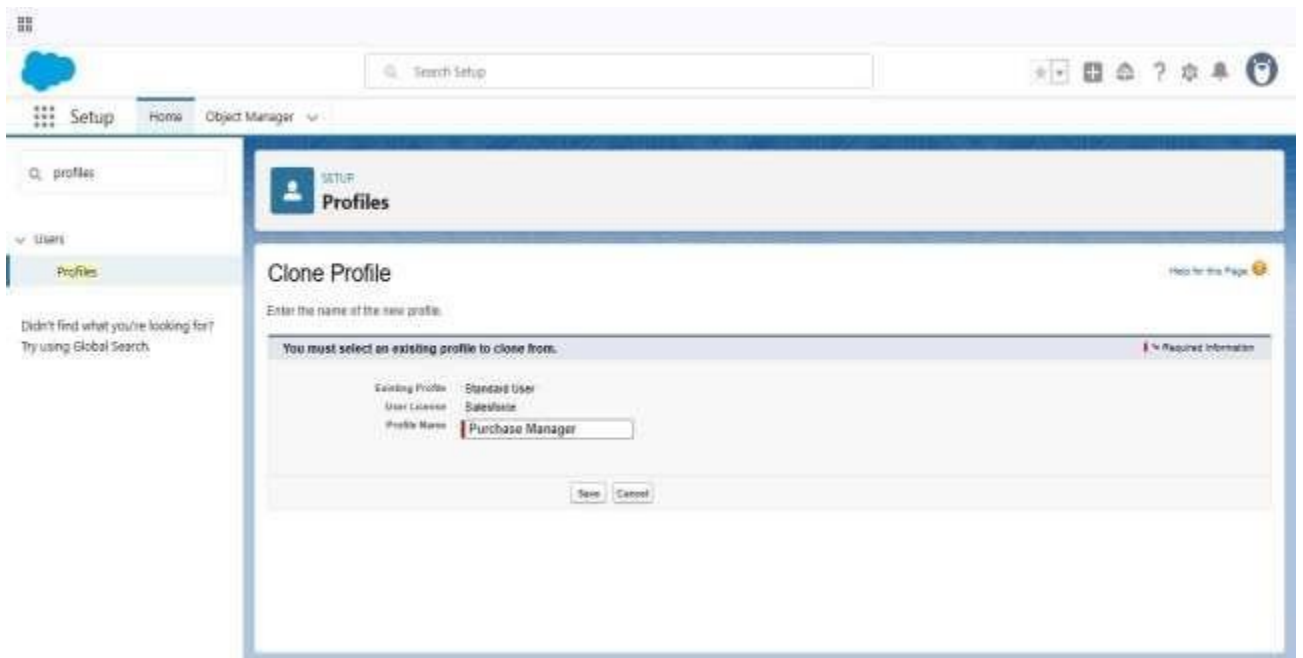
Search Setup

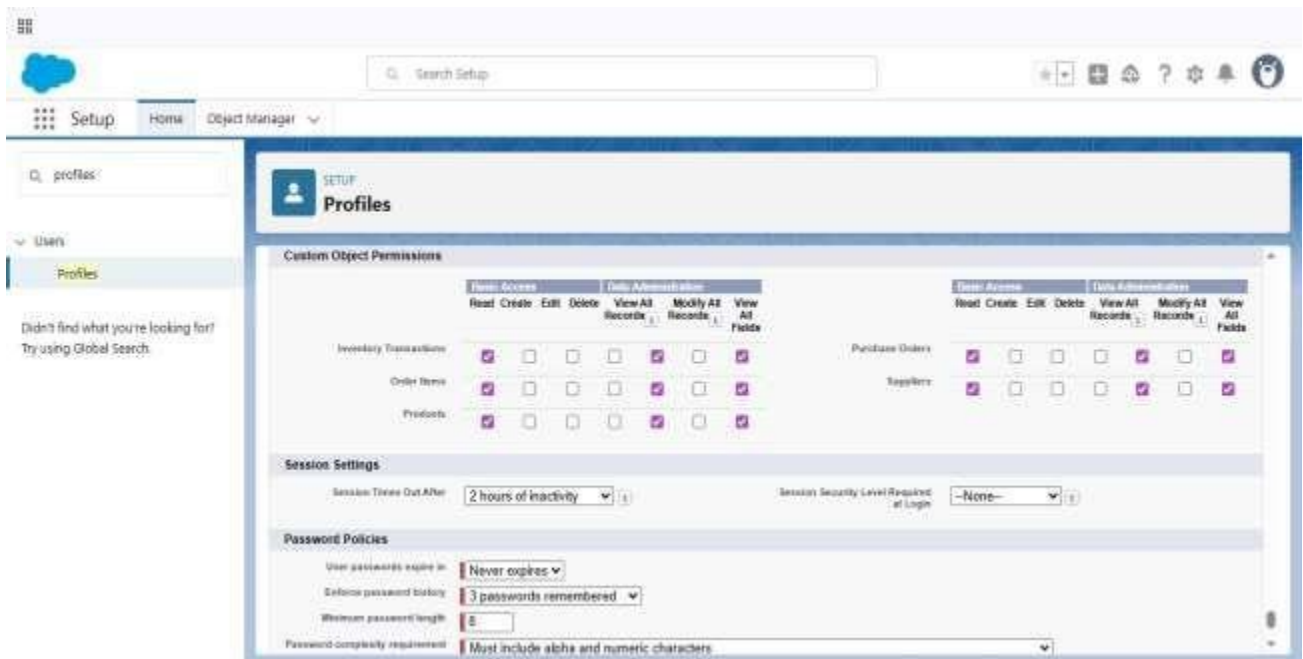
Help for this Page

| | | | | | |
|---|-------------------------------------|-------------------------------------|---|-------------------------------------|--------------------------|
| App Launcher (standard__AppLauncher) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Standard User Management (standard__StandardUserManagement) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Approvals (standard__Approvals) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Sales (standard__LightningSales) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Automation (standard__FlowApp) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Sales (standard__Sales) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Build Solutions (standard__LightningBuild) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Sales Cloud Mobile (standard__SalesCloudMobile) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Community (standard__Community) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Sales Console (standard__LightningSalesConsole) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Content (standard__Content) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Salesforce Chatbot (standard__Chatbot) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Data Cloud (standard__Analytics360) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Salesforce Scheduler Setup (standard__LightningScheduler) | <input type="checkbox"/> | <input type="checkbox"/> |
| Data Manager (standard__DataManager) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Sample Console (standard__ServiceConsole) | <input type="checkbox"/> | <input type="checkbox"/> |
| Digital Experience (standard__SalesforceCMS) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Service (standard__Service) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Lightning Usage App (standard__LightningUsageApp) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Service Console (standard__LightningService) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Marketing CRM Classic (standard__Marketing) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Site.com (standard__Site) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Medical Inventory Management (medical__InventoryManagement) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Subscription Management (standard__ReversalCloudConsole) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| | | | WDC (standard__Work) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |



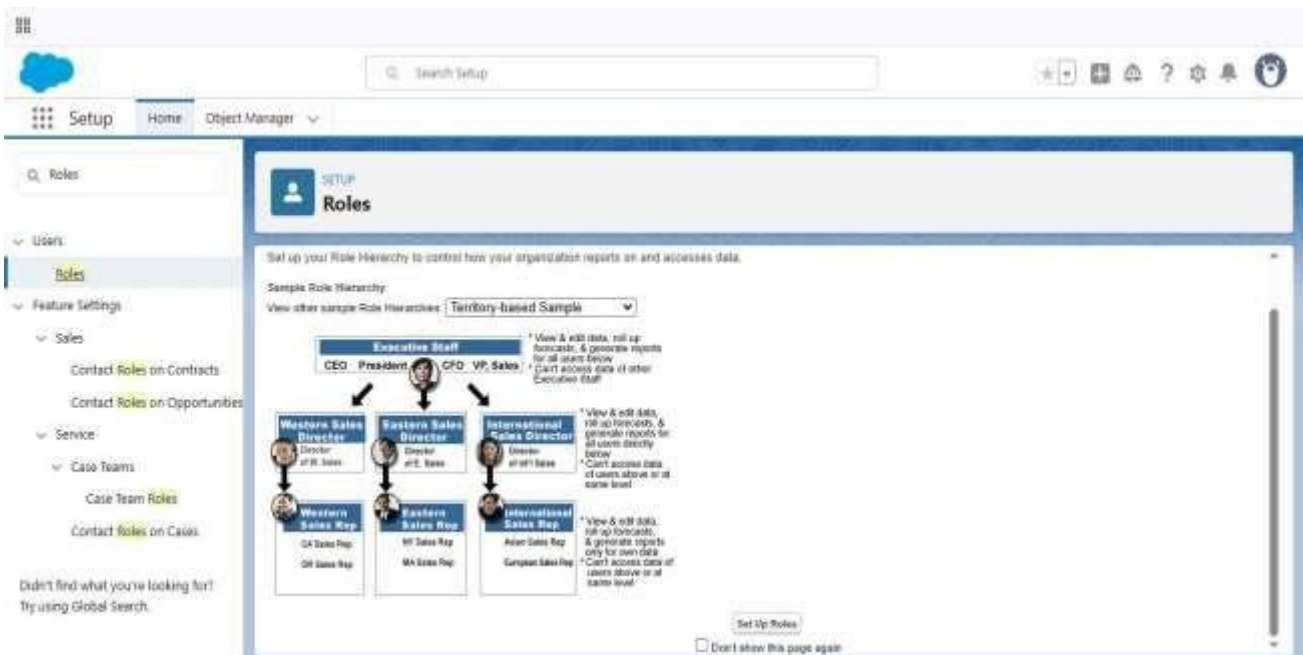
- To Create an Purchase Manager Profile:





2.9 Roles:

- Create a Purchasing Manager Role:



[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

Permission Sets

Create
 [Help for this Page](#)

Save Cancel

Enter permission set information Required Information

Label

Purchase Manager Create Access

API Name

Purchase Manager

Description

Session Activation Required

☐

Select the type of users who will use this permission set

Who will use this permission set?

- Choose --None-- if you plan to assign this permission set to multiple users with different user and permission set licenses.
 - Choose a specific user license if you want users with only one license type to use this permission set.

[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

Permission Sets

Purchase Manager Create Access
 [View Tutorial](#)
[Help for this Page](#)

Find Settings... Clone Delete Edit Properties Manage Assignments View Summary

Permission Set Overview
 Object Settings
 Order Items

Order Items

Save Cancel

Tab Settings

| Available | Visible |
|-------------------------------------|-------------------------------------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Object Permissions

| Permission Name | Enabled |
|-----------------|-------------------------------------|
| Read | <input checked="" type="checkbox"/> |
| Create | <input checked="" type="checkbox"/> |
| Edit | <input type="checkbox"/> |
| Delete | <input type="checkbox"/> |

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.

Select Users to Assign

All Users

1 item selected

Search this list...

Full Name

AL

Username

R

A

Profile

☐

ASHIKA R

23b

23bxa109ashika28@agentforce.com

☒

System Administrator

☐

Chatter Expert

Chatter

chatty.003gk00000aaddhuaz77cv@ghnha@chatter.salesforce.com

☒

Chatter Free User

☐

Integration User

Integ

integration@003gk00000aaddhuaz.com

☒

Analytics Cloud Integration Us...

☒

OrgFarm EPIC

OEPI

epic.c4181330229@orgfarm.safeforce.com

☒

System Administrator

☐

Cancel

Next

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.

Select an Expiration Option For Assigned Users

☒ No expiration date

☐ Specify the expiration date

1 Day1 Week30 Days60 DaysCustom Date

Time Zone
Select a time zone...

Selected Users

Full Name

Role

Profile

Active

User License

Expires On

OrgFarm EPIC

System Administrator

☒

Salesforce

Never Expires

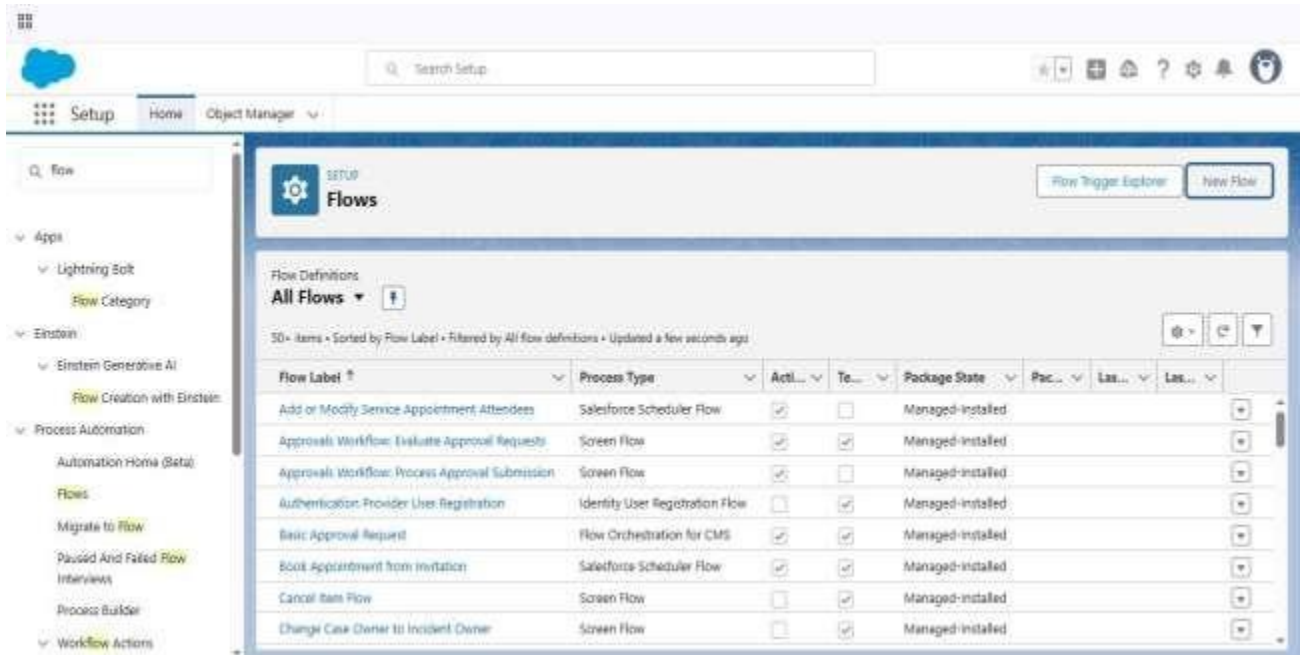
Cancel

Back

Assign

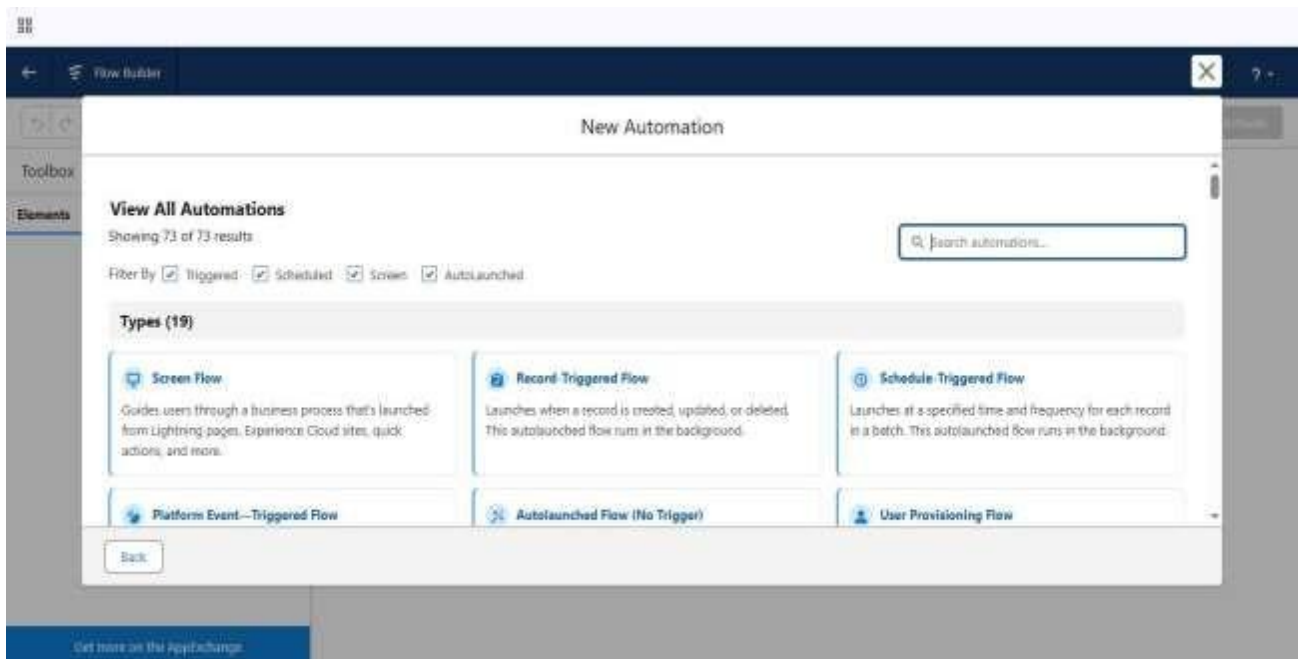
2.11 Flows:

- Create Flow to Update the Actual Delivery Date:



The screenshot shows the Salesforce Setup interface. On the left, the navigation menu is open, showing the 'Setup' tab. The 'Flows' section is highlighted under 'Process Automation'. The main content area displays the 'Flows' page with a search bar and a 'New Flow' button. Below this, there is a table of 'Flow Definitions'.

| Flow Label | Process Type | Acti... | Te... | Package State | Pac... | Las... | Las... |
|---|---------------------------------|-------------------------------------|-------------------------------------|-------------------|--------|--------|--------|
| 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 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 | | | |



The screenshot shows the 'New Automation' dialog in the Salesforce Flow Builder. The dialog is titled 'New Automation' and displays a list of automation types. The 'View All Automations' section shows 73 results. The 'Filter By' section includes checkboxes for 'Triggered', 'Scheduled', 'Screen', and 'Autolaunched'. The 'Types (19)' section lists six automation types:

- Screen Flow**: Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
- Record-Triggered Flow**: Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
- Schedule-Triggered Flow**: Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
- Platform Event—Triggered Flow**
- Autolaunched Flow (No Trigger)**
- User Provisioning Flow**

A 'Back' button is located at the bottom left of the dialog.

Flow Builder

Select Elements | Run | Settings | View Tools | Save As New Version | Save | Activate

Record-Triggered Flow Start

Object: Purchase Order [Edit](#)

Trigger: A record is created or updated

Optimize for: Fast Field Updates

[Open Flow Trigger Explorer for Purchase...](#)

End

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Purchase Order

Configure Trigger

Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Flow Builder

Select Elements | Run | Settings | View Tools | Save As New Version | Save | Activate

Record-Triggered Flow Start

Object: Purchase Order [Edit](#)

Trigger: A record is created or updated

Optimize for: Fast Field Updates

[Open Flow Trigger Explorer for Purchase...](#)

End

Configure Start

Condition Requirements

None

Optimize Flow

Optimize the flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs **before the record is saved** to the database.

Actions and Related Records

Update any record and perform actions. We send an email. This more flexible flow runs **after the record is saved** to the database.

is this flow making an external callout or connecting to an external system?

An asynchronous path is required for flows that involve external systems.

Add Asynchronous Path ☐

Flow Builder

Get Purchase Record

Record-Triggered Flow Start

Object: Purchase Order

Trigger: A record is created or updated

Optimize for: Fast Field Updates

Open Flow Trigger Explorer for Purcha...

Get Purchase Record

Get Records

End

Get Records

*Label

Get Purchase Record

*API Name

Get_Purchase_Record

Description

Get Records of This Object

*Object

Purchase Order

Filter Purchase Order Records

Condition Requirements

All Conditions Are Met (AND)

Field

Record ID

Operator

Equals

Value

Purchase Record + Record ID

Flow Builder

Get Purchase Record

Record-Triggered Flow Start

Object: Purchase Order

Trigger: A record is created or updated

Optimize for: Fast Field Updates

Open Flow Trigger Explorer for Purcha...

Get Purchase Record

Get Records

End

Get Records

How Many Records to Store

☒ Only the first record

☐ All records, up to a specified limit

☐ All records

How to Store Record Data

☐ Automatically store all fields

☒ Choose fields and let Salesforce do the rest

☐ Choose fields and assign variables (advanced)

Select Purchase Order Fields to Store in Variable

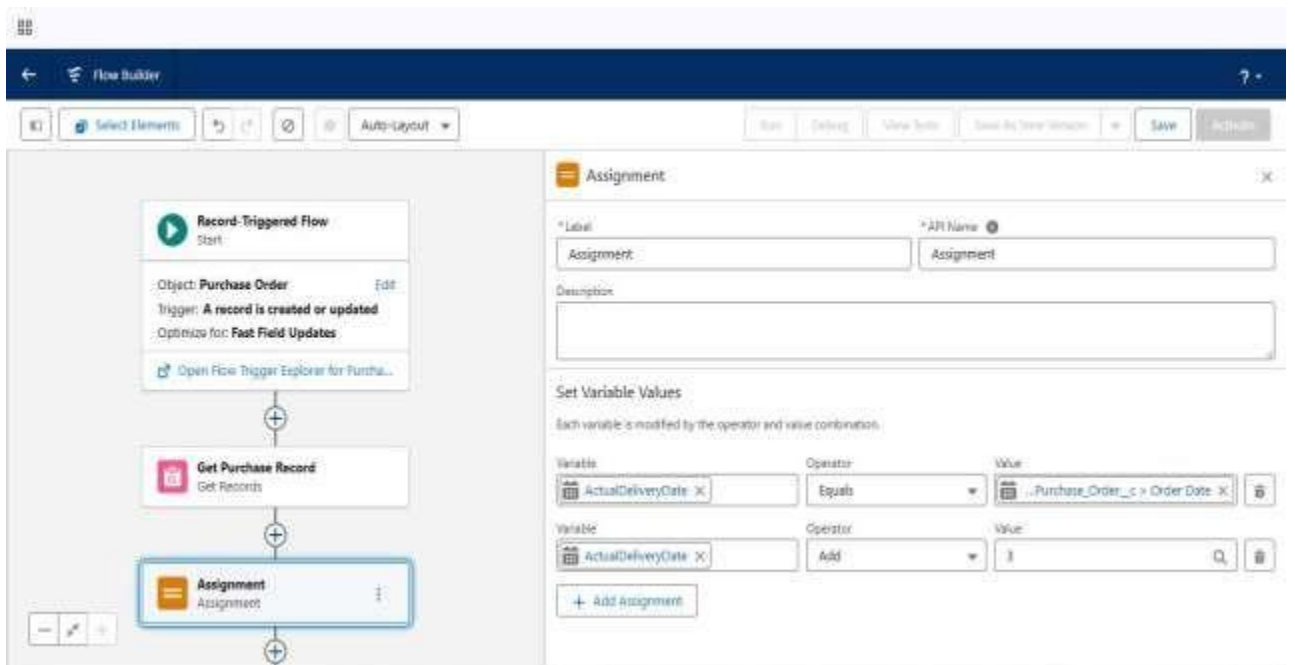
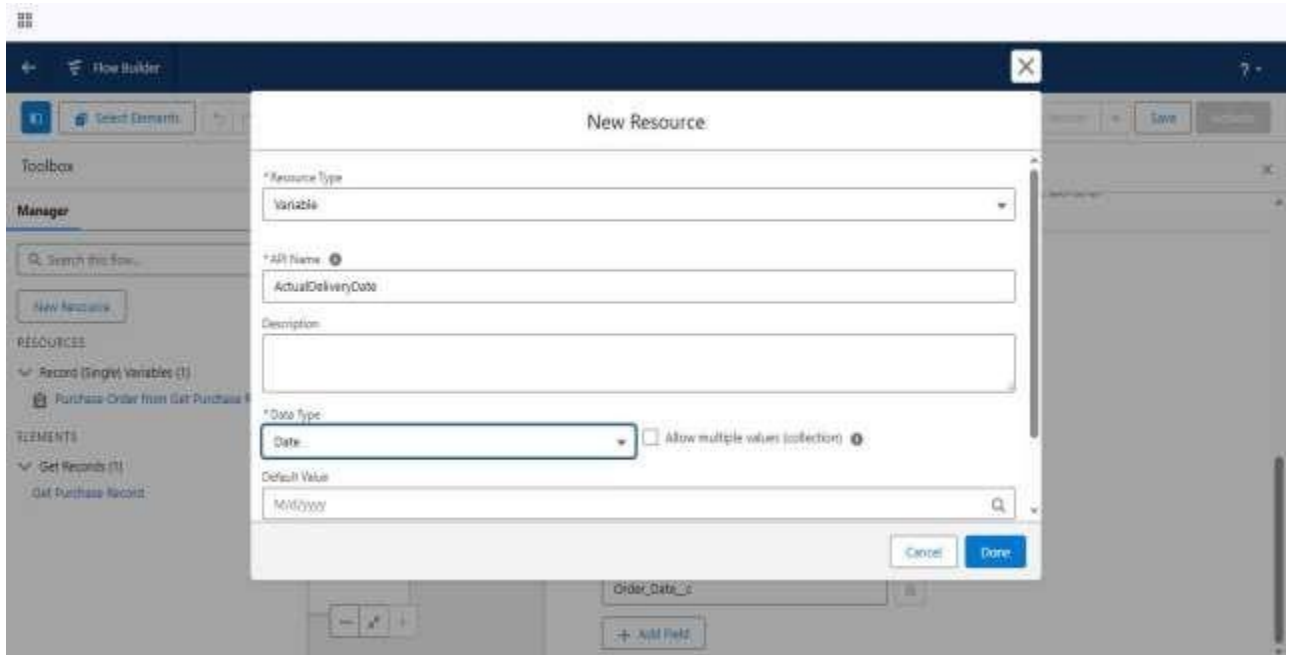
Field

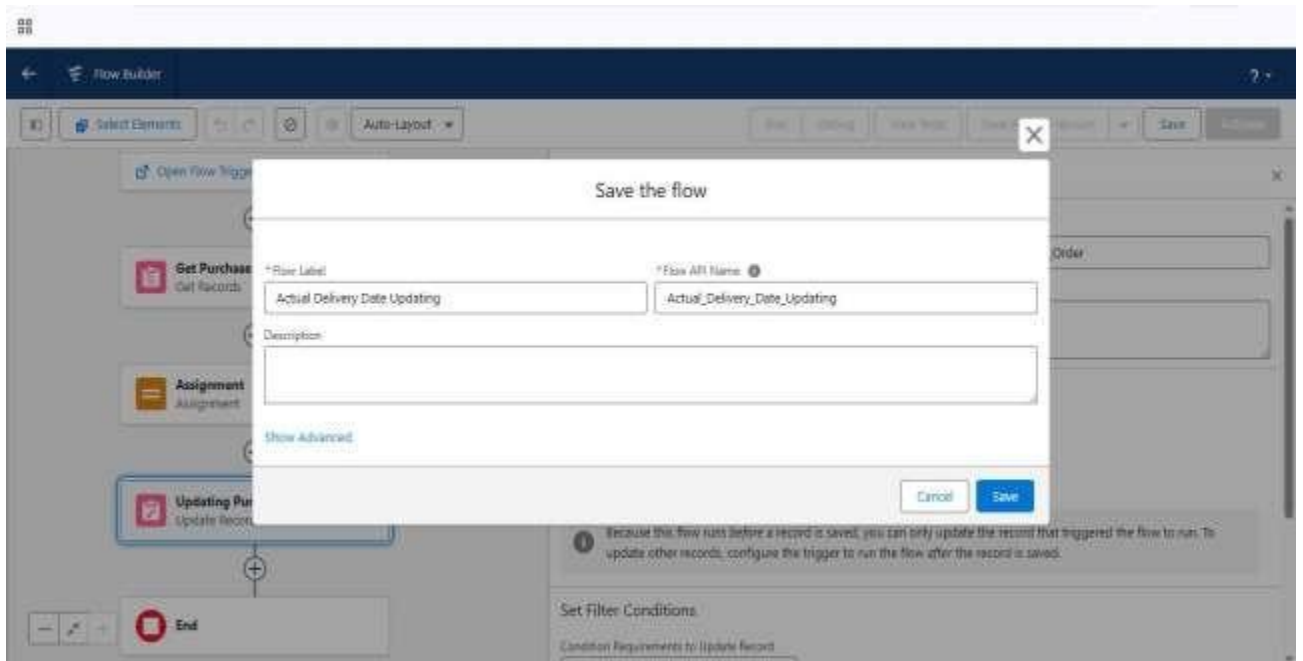
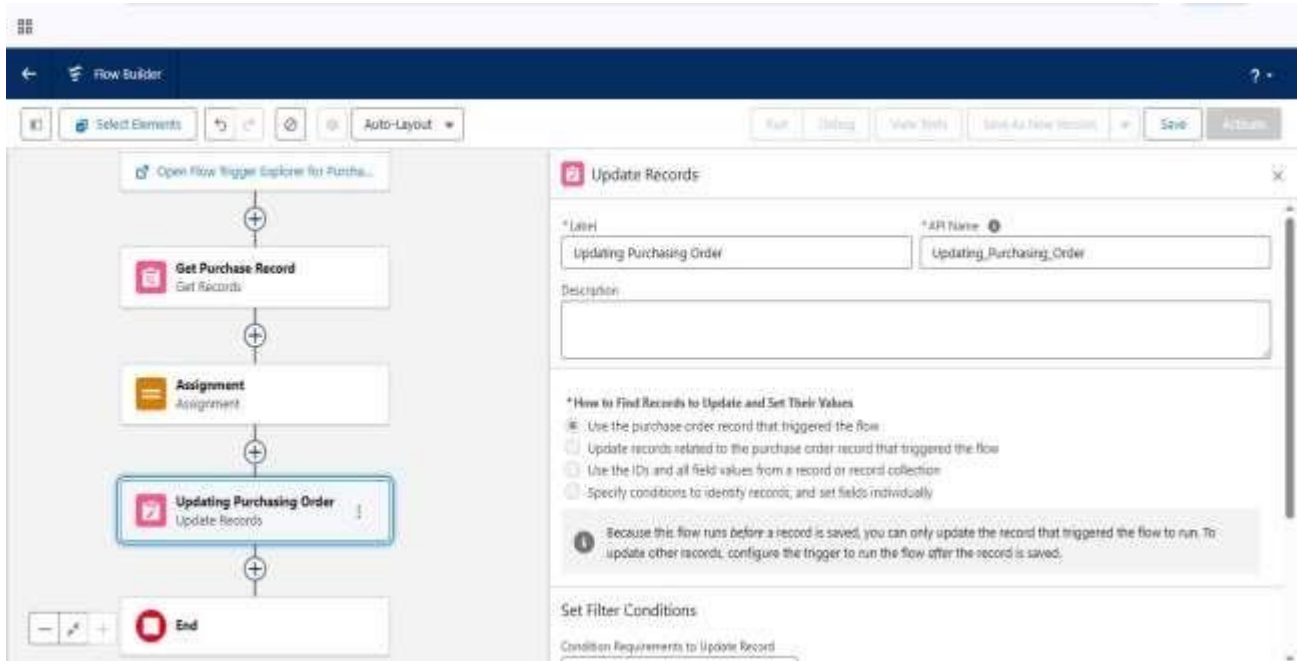
Id

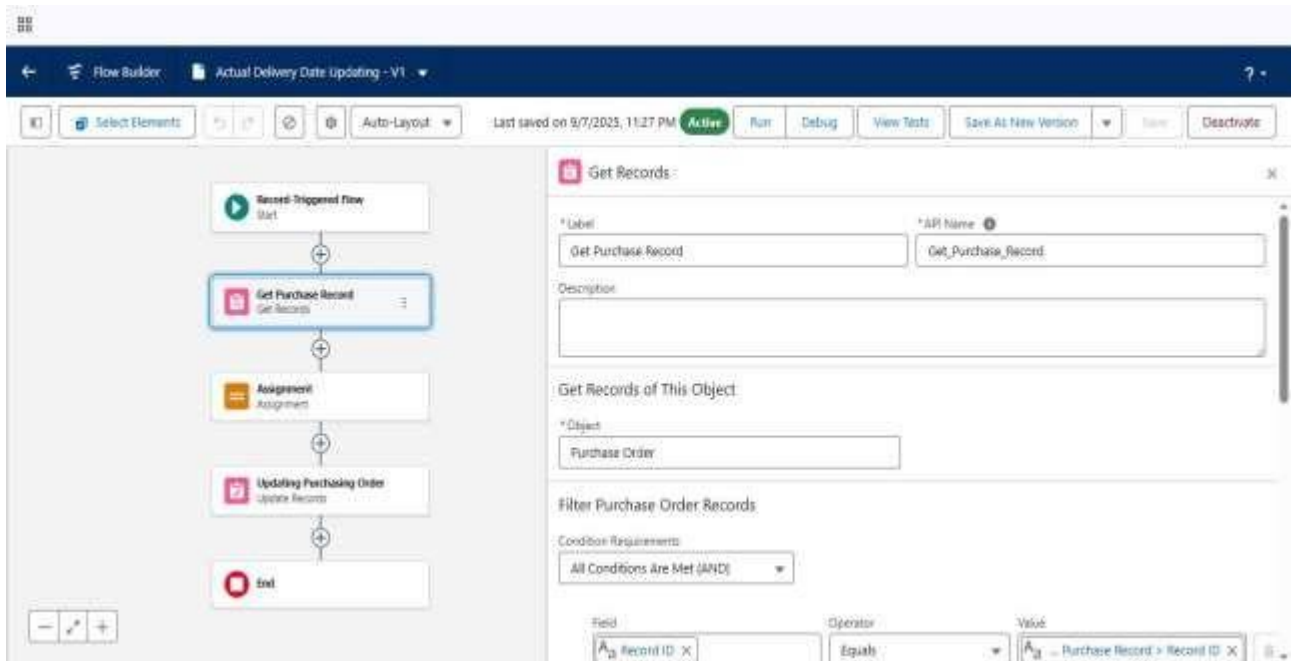
Field

Order_Date_c

+ Add Field

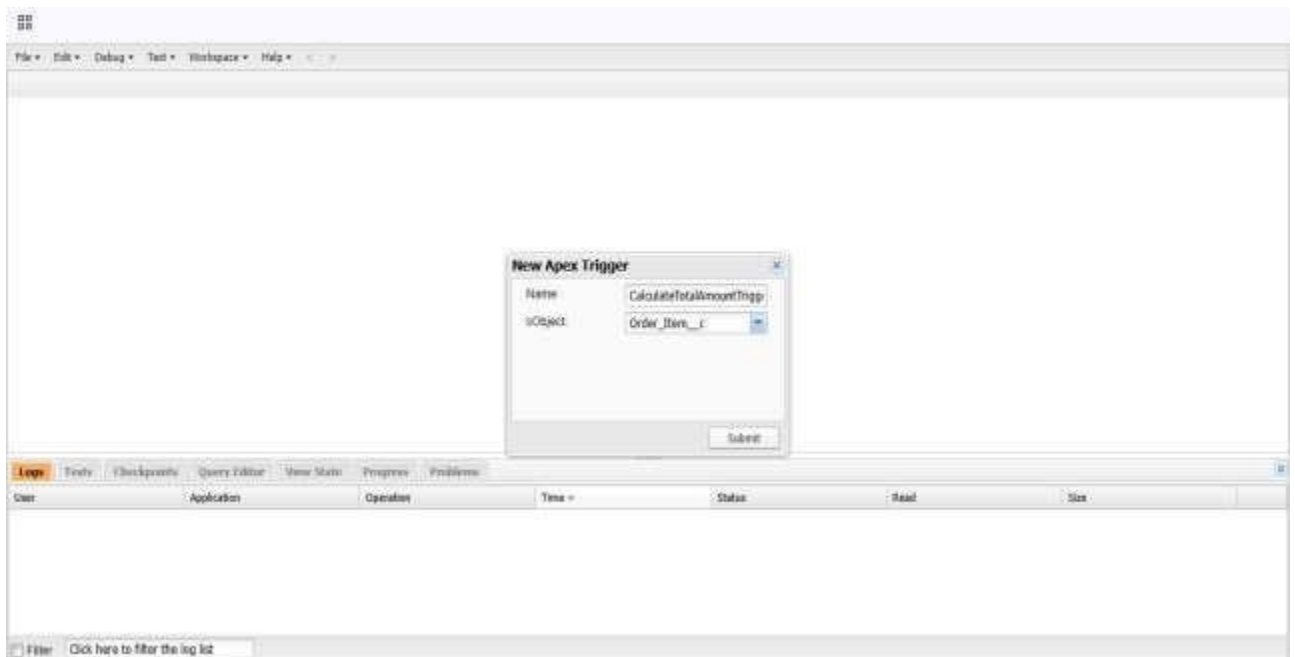


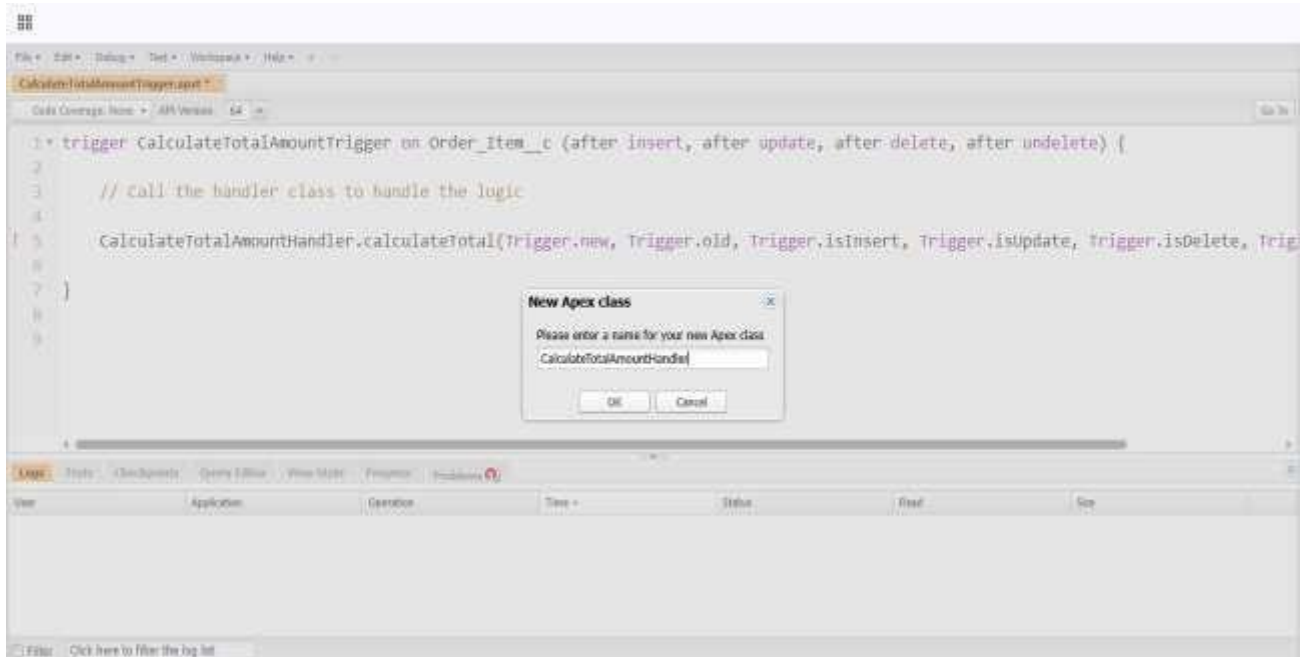




2.12 Triggers:

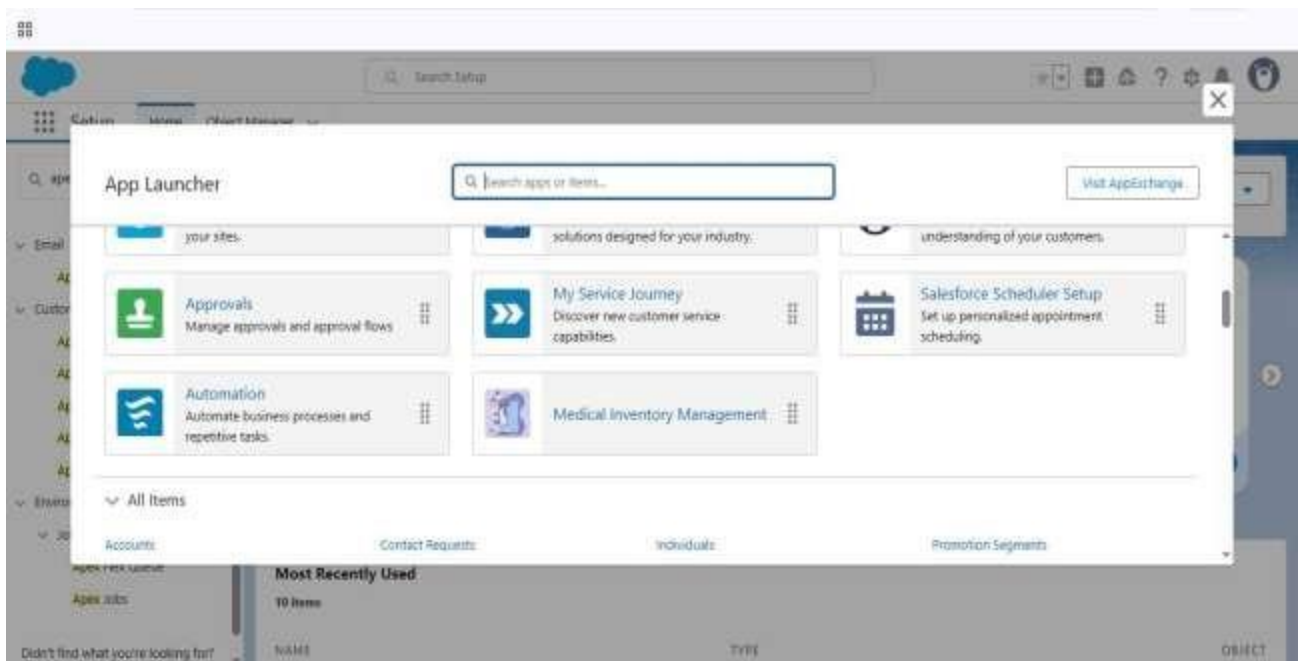
- Create a Trigger to calculate Total Amount on Order Item :

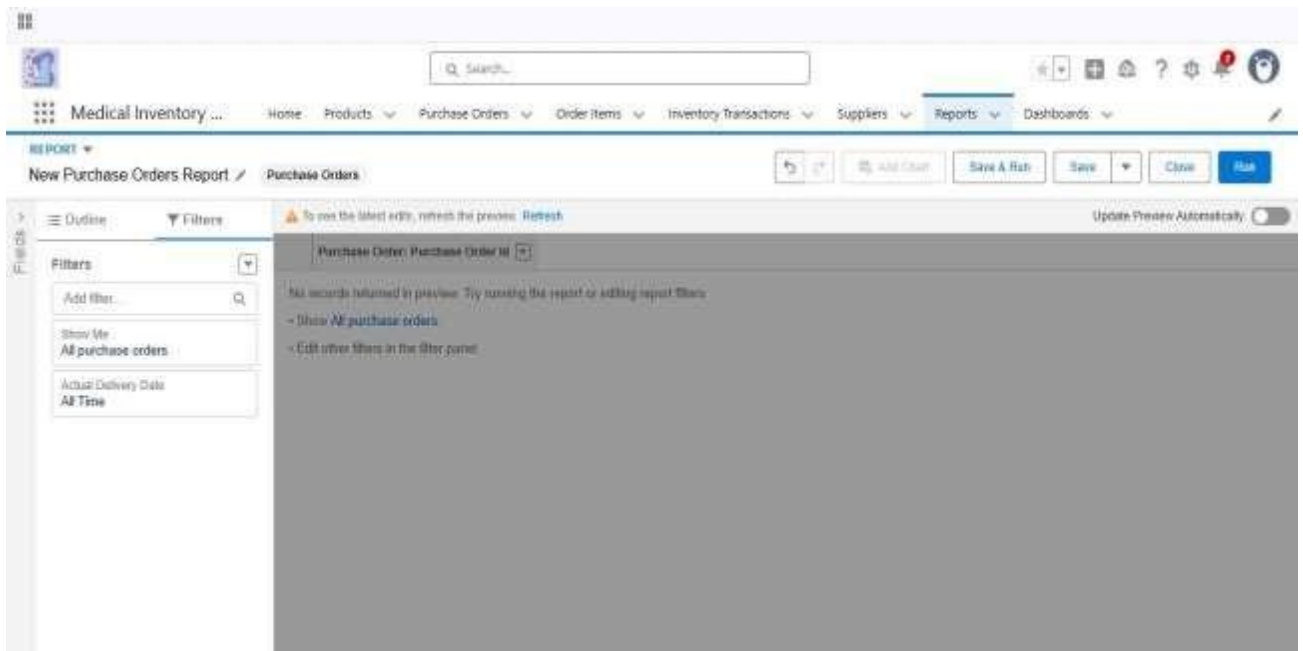
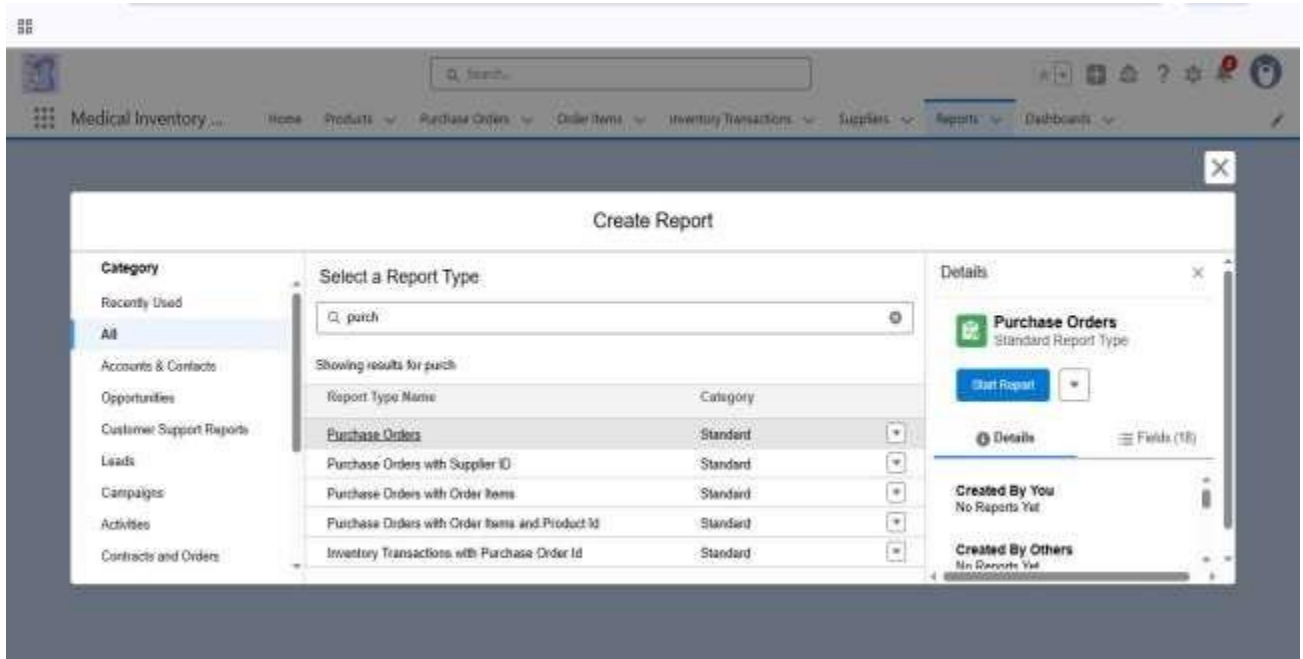




2.13 Reports:

- Create a Purchase Orders based in Suppliers(Summary) Report:





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

REPORT Purchase Orders based on Suppliers Purchase Orders

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

| Supplier ID | Purchase Order: Purchase Order ID | Order Counts | Total Order Costs |
|------------------|-----------------------------------|--------------|-------------------|
| Supplier_001 (4) | Purchase-0001 (1) | 3 | \$2,075 |
| | Purchase-0002 (1) | 2 | \$3,250 |
| | Purchase-0003 (1) | 3 | \$7,000 |
| | Purchase-0004 (1) | 4 | \$9,500 |
| Supplier_002 (1) | Purchase-0005 (1) | 2 | \$4,500 |
| Total (5) | | 14 | \$26,325 |

Row Counts Detail Rows Subtotals Grand Total

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

REPORT New Purchase Orders Report Purchase Orders

Save Report

Report Unique Name: Purchase_Orders_based_on_Suppliers_32K

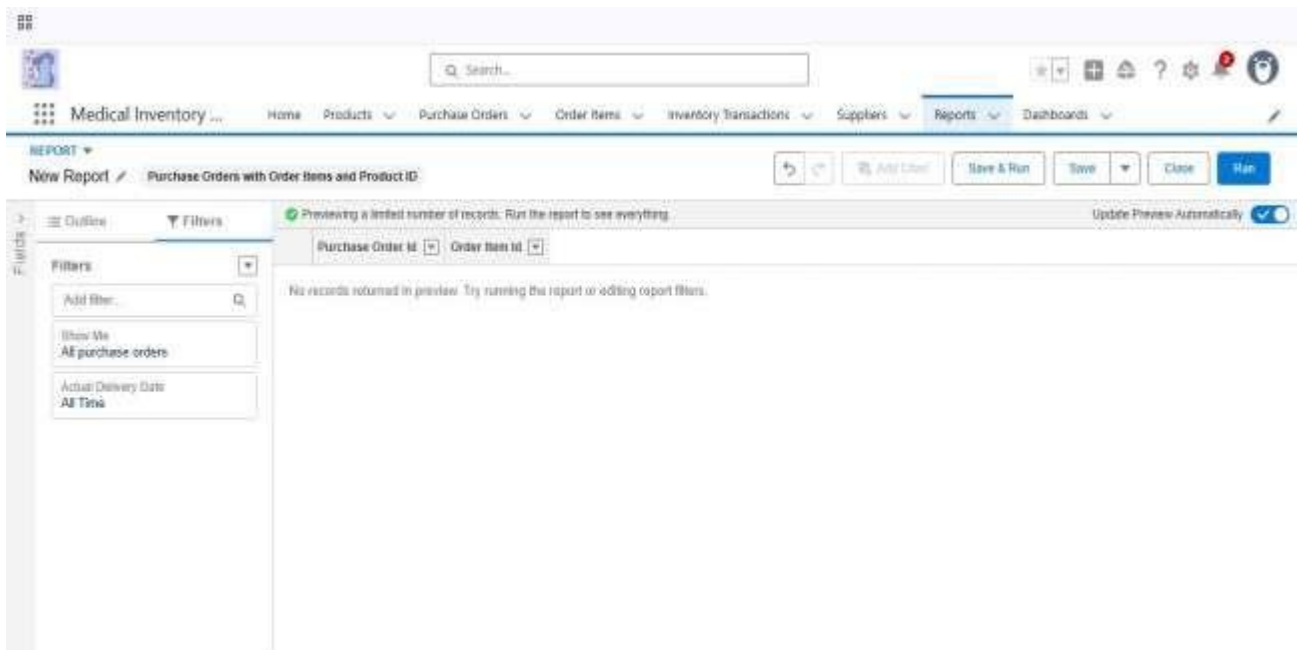
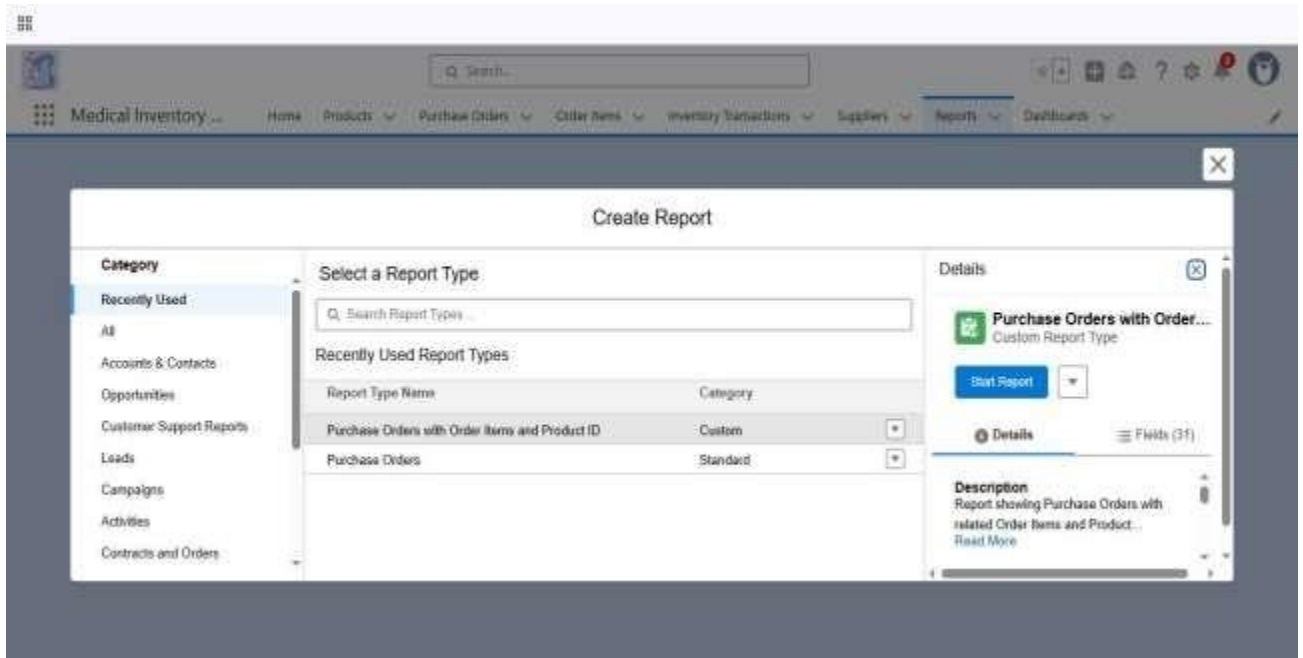
Report Description:

Folder: Private Reports

Cancel Save

Row Counts Detail Rows Subtotals Grand Total

- Create a Complete Purchase Details Report:



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

REPORT ▼

New Report / Purchase Orders with Order Items and Product ID

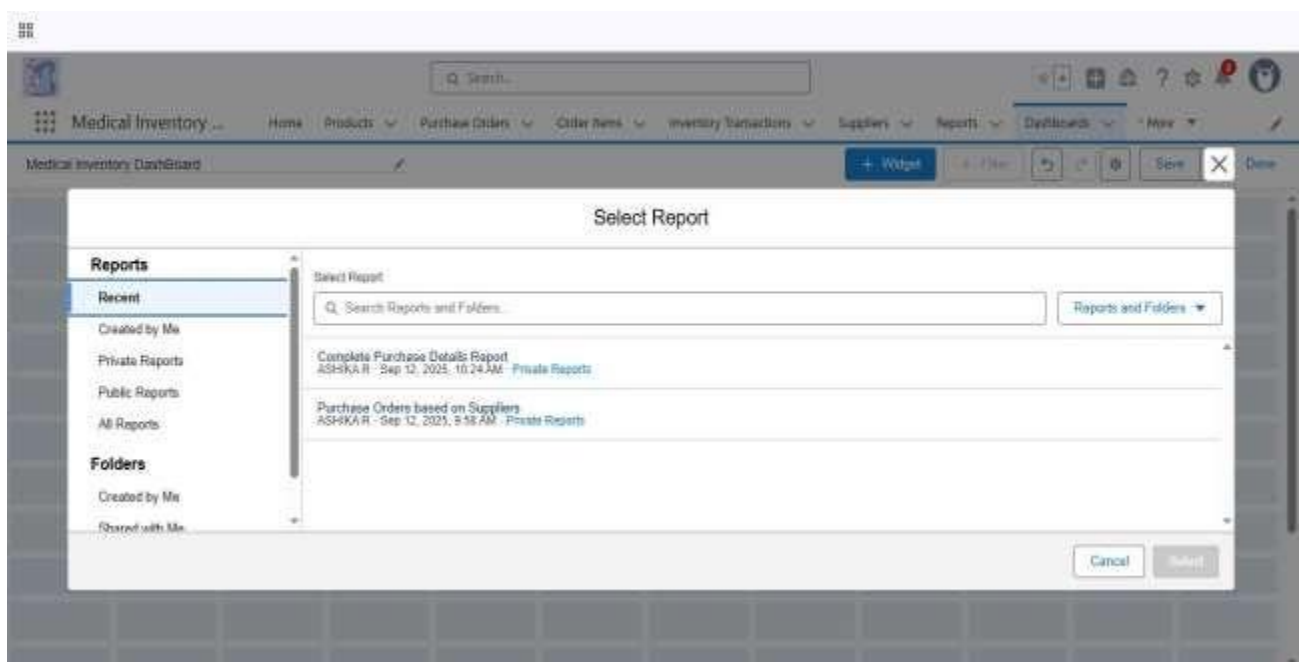
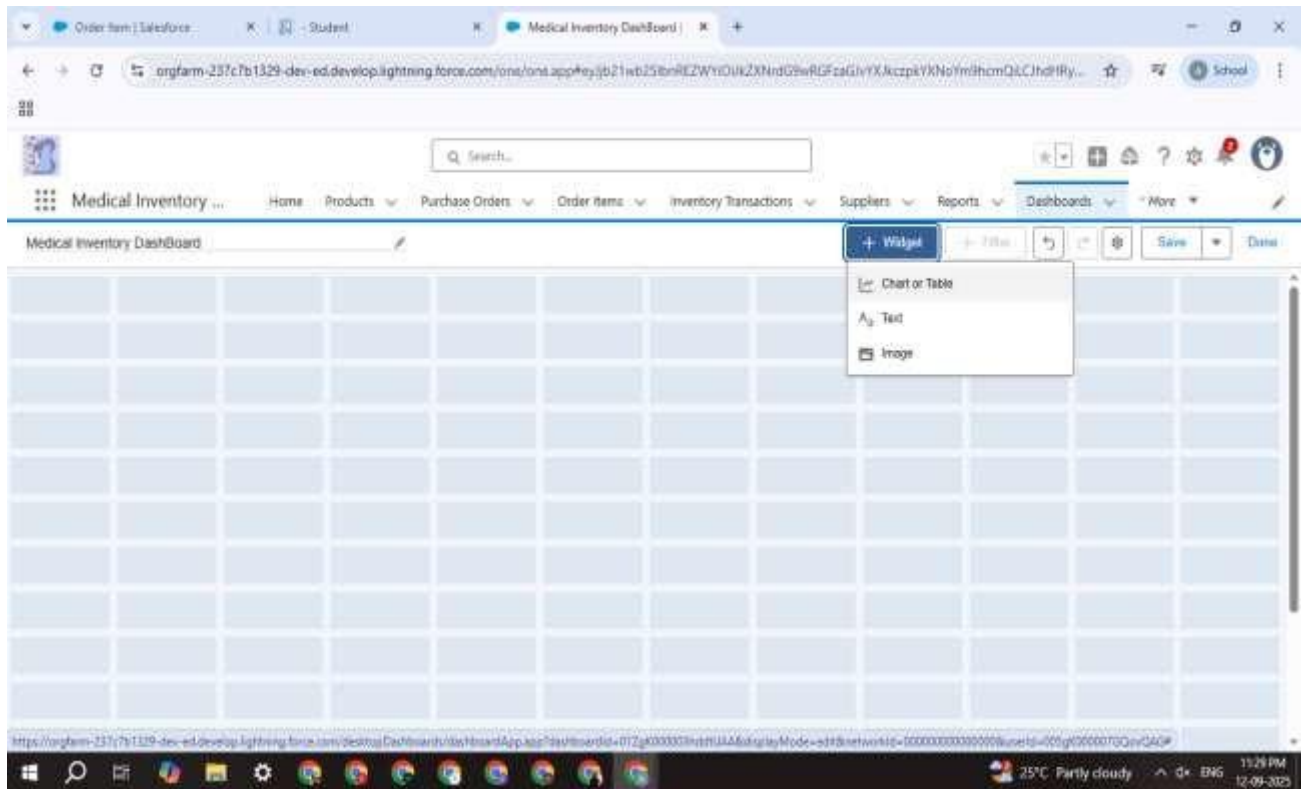
Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

| Supplier ID: Supplier Id | Actual Delivery Date | Purchase Order Id | Order Item Id | Product Id: Product Id | Order Counts | Product Id: Product Name |
|--------------------------|----------------------|---------------------|---------------------|------------------------|--------------|--------------------------|
| Supplier_001 (8) | 8/19/2025 (2) | Purchase-0004 (2) | Syringes (Gen-0004) | | 4 | |
| | | | Dolo 650 (Cap-0004) | | 4 | |
| | | | Subtotal | | 4 | |
| | Subtotal | | | | 4 | |
| 9/21/2025 (2) | Purchase-0001 (2) | Syringes (Gen-0005) | | 3 | | |
| | | | Dolo 650 (Cap-0001) | | 3 | |
| | | | Subtotal | | 3 | |
| | Subtotal | | | | 3 | |
| 9/28/2025 (2) | Purchase-0002 (2) | Syringes (Gen-0002) | | 2 | | |
| | | | Dolo 650 (Cap-0001) | | 2 | |
| | | | Subtotal | | 2 | |
| | Subtotal | | | | 2 | |

Row Counts Detail Rows Subtotals Grand Total Conditional Formatting

2.14 Dashboards:

- Create Dashboards:



Medical Inventory Dashboard

Search...

Home Products Purchase Orders Order Items Inventory Transactions Suppliers Reports Dashboards More

Medical Inventory Dashboard

+ Widget

Close

Save Done

Add Widget

Report: Purchase Orders based on Suppliers

☐ Use chart settings from report

Display As:

123

X Axis: Supplier ID

Preview:

Purchase Orders based on Suppliers

Sum of Order Counts

Supplier ID = Purchase Order: Purchase Order ID

View Report (Purchase Orders based on Suppliers)

Cancel Add

| Supplier ID | Purchase Order ID | Sum of Order Counts |
|-------------|-------------------|---------------------|
| Pur... | Purchase-0001 | 3 |
| Pur... | Purchase-0002 | 2 |
| Pur... | Purchase-0003 | 3 |
| Pur... | Purchase-0004 | 4 |
| Pur... | Purchase-0005 | 2 |

Medical Inventory Dashboard

Search...

Home Products Purchase Orders Order Items Inventory Transactions Suppliers Reports Dashboards More

Medical Inventory Dashboard

+ Widget + Filter

Save Done

Purchase Orders based on Suppliers

Sum of Order Counts

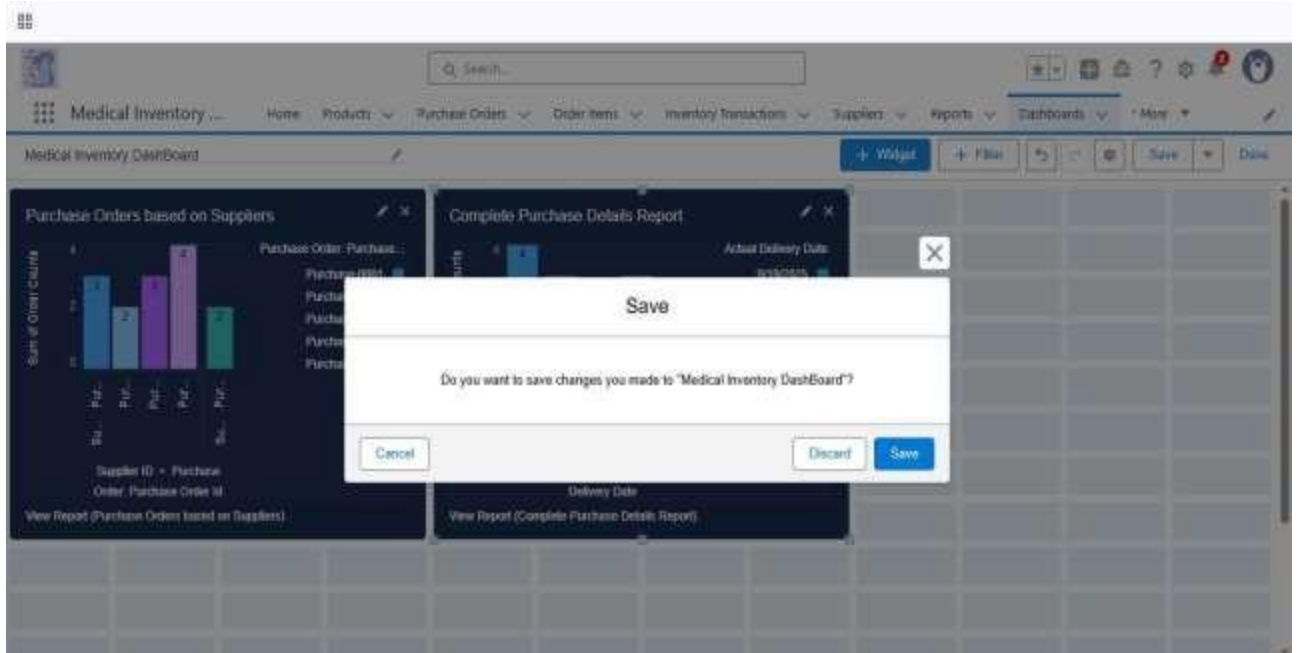
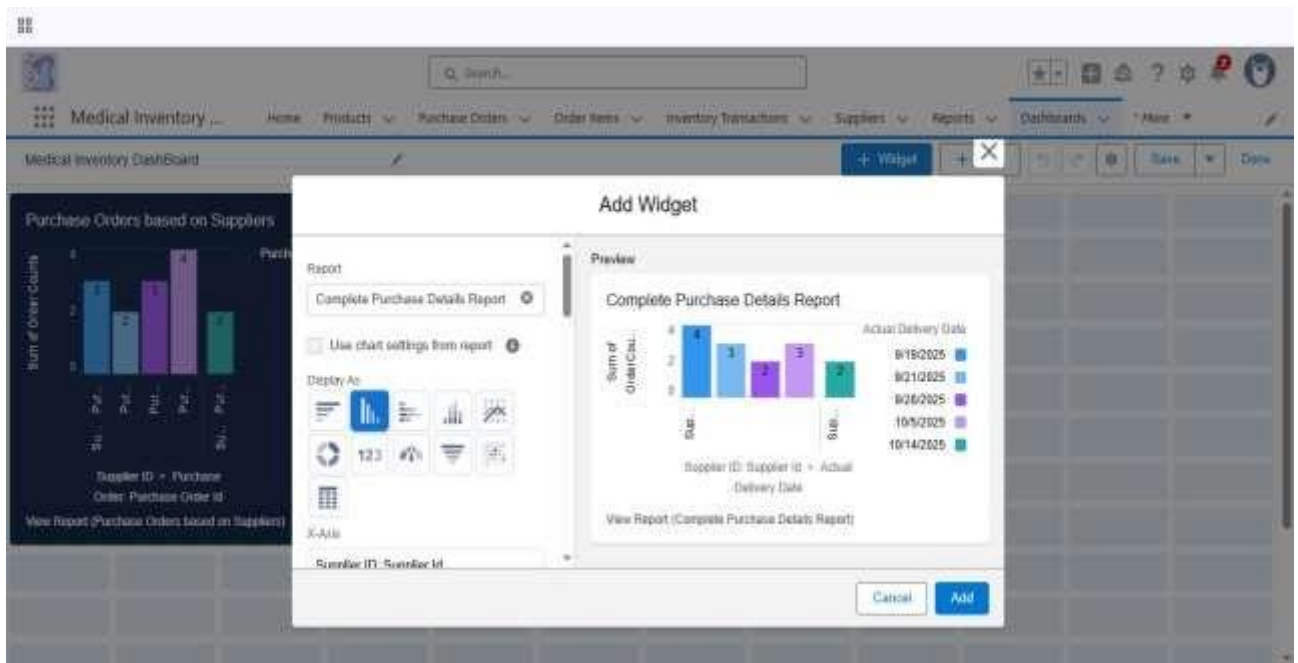
Supplier ID = Purchase Order: Purchase Order ID

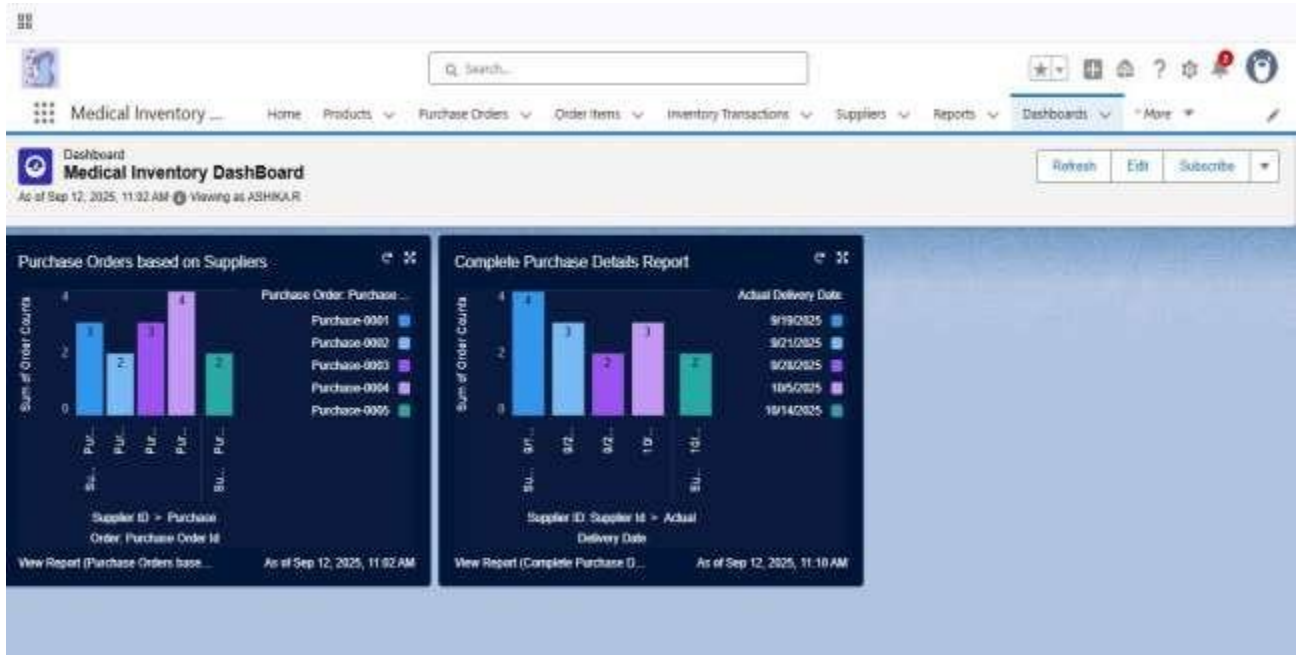
View Report (Purchase Orders based on Suppliers)

Purchase Order: Purchase...

- Purchase-0001
- Purchase-0002
- Purchase-0003
- Purchase-0004
- Purchase-0005

| Supplier ID | Purchase Order ID | Sum of Order Counts |
|-------------|-------------------|---------------------|
| Pur... | Purchase-0001 | 3 |
| Pur... | Purchase-0002 | 2 |
| Pur... | Purchase-0003 | 3 |
| Pur... | Purchase-0004 | 4 |
| Pur... | Purchase-0005 | 2 |





3. CONCLUSION

The Medical Inventory Management System successfully streamlines the operations of medical inventory through a structured, automated Salesforce application. It improves efficiency, accuracy, and transparency in managing suppliers, purchase orders, product inventory, and expiry monitoring, helping medical organizations focus on delivering better healthcare services.

APPENDIX:

- **Source Code:** Provided in Apex Classes and Triggers

CalculateTotalAmountTrigger.apxt:

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

```
// Call the handler class to handle the logic
```

```
CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old, Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete, Trigger.isUndelete);}
```

CalculateTotalAmountHandler.apxc:

```
public class CalculateTotalAmountHandler {

    // Method to calculate the total amount for Purchase Orders based on related Order Items

    public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c> oldItems,
    Boolean isInsert, Boolean isUpdate, Boolean isDelete, Boolean isUndelete) {

        // Collect Purchase Order IDs affected by changes in Order_Item__c records

        Set<Id> parentIds = new Set<Id>();

        // For insert, update, and undelete scenarios

        if (isInsert || isUpdate || isUndelete) {

            for (Order_Item__c ordItem : newItems) {

                parentIds.add(ordItem.Purchase_Order_Id__c);

            }

        }

        // For update and delete scenarios

        if (isUpdate || isDelete) {

            for (Order_Item__c ordItem : oldItems) {

                parentIds.add(ordItem.Purchase_Order_Id__c);

            }

        }

        // Calculate the total amounts for affected Purchase Orders

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

        if (!parentIds.isEmpty()) {

            // Perform an aggregate query to sum the Amount__c for each Purchase Order

            List<AggregateResult> aggrList = [
```

```

SELECT Purchase_Order_Id__c, SUM(Amount__c) totalAmount

FROM Order_Item__c

WHERE Purchase_Order_Id__c IN :parentIds

GROUP BY Purchase_Order_Id__c

];

// Map the result to Purchase Order IDs

for (AggregateResult aggr : aggrList) {

    Id purchaseOrderId = (Id)aggr.get('Purchase_Order_Id__c');

    Decimal totalAmount = (Decimal)aggr.get('totalAmount');

    purchaseToUpdateMap.put(purchaseOrderId, totalAmount);

}

// Prepare Purchase Order records for update

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

for (Id purchaseOrderId : purchaseToUpdateMap.keySet()) {

    Purchase_Order__c purchaseOrder = new Purchase_Order__c(Id = purchaseOrderId,
Total_Order_costs__c = purchaseToUpdateMap.get(purchaseOrderId));

    purchaseToUpdate.add(purchaseOrder);

}

// Update Purchase Orders if there are any changes

if (!purchaseToUpdate.isEmpty()) {

    update purchaseToUpdate;}

}

}

```