

MEDICAL INVENTORY MANAGEMENT

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Project overview :

1. Introduction :

The Medical Inventory Management System project aims to design and implement a streamlined solution for tracking, managing, and optimizing the use of medical supplies and equipment within a healthcare facility. The project addresses the critical need for accurate inventory control to ensure the continuous availability of essential medical items, reduce waste, and support efficient healthcare delivery.

This system will enable healthcare staff to monitor inventory levels in real-time, automate reordering processes, track expiration dates, and generate reports for better decision-making. By integrating digital tools such as barcoding, RFID, and inventory management software, the project will minimize human errors, reduce operational costs, and improve compliance with regulatory standards.

The system is intended to serve hospitals, clinics, pharmacies, and laboratories, providing an adaptable and user-friendly platform that supports daily operations and long-term inventory planning.

Milestone 1-Salesforce Account :

Activity 1: Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :

The image shows a composite view of the Salesforce Developer Edition. On the left, there's a promotional graphic with a computer monitor displaying a network diagram, surrounded by abstract blue shapes. Below it, text reads "Build enterprise-quality apps fast to bring your ideas to life" and a bulleted list of features: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right, the actual sign-up form is displayed. It features the Salesforce logo at the top, followed by the heading "Sign up for your Salesforce Developer Edition" and the subtext "A full-featured copy of the Platform, for free". A callout box says "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form itself has fields for "First Name*", "Last Name*", "Email*", "Role*", and "Company*".

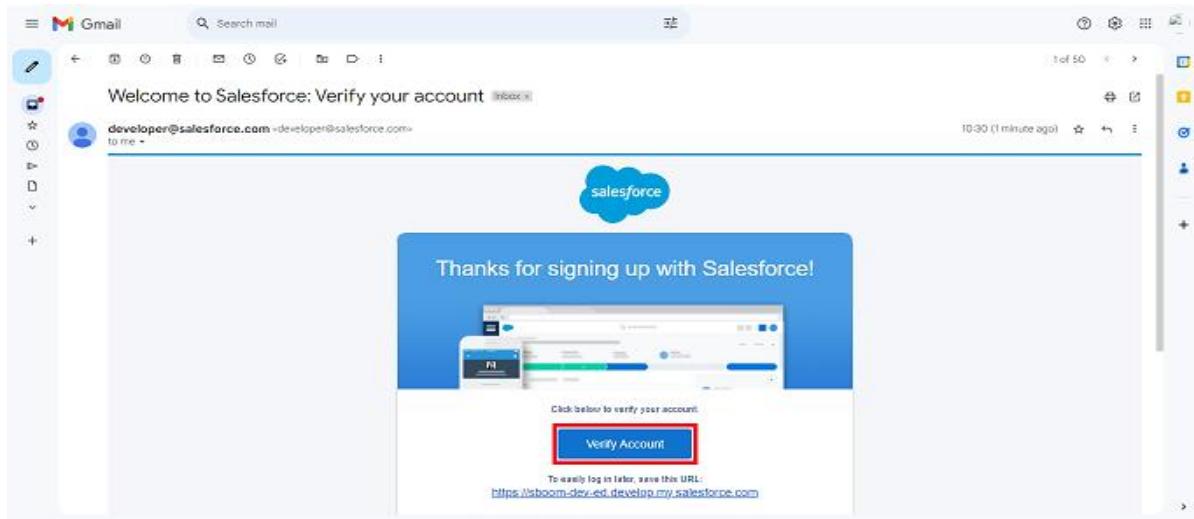
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these.

Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.

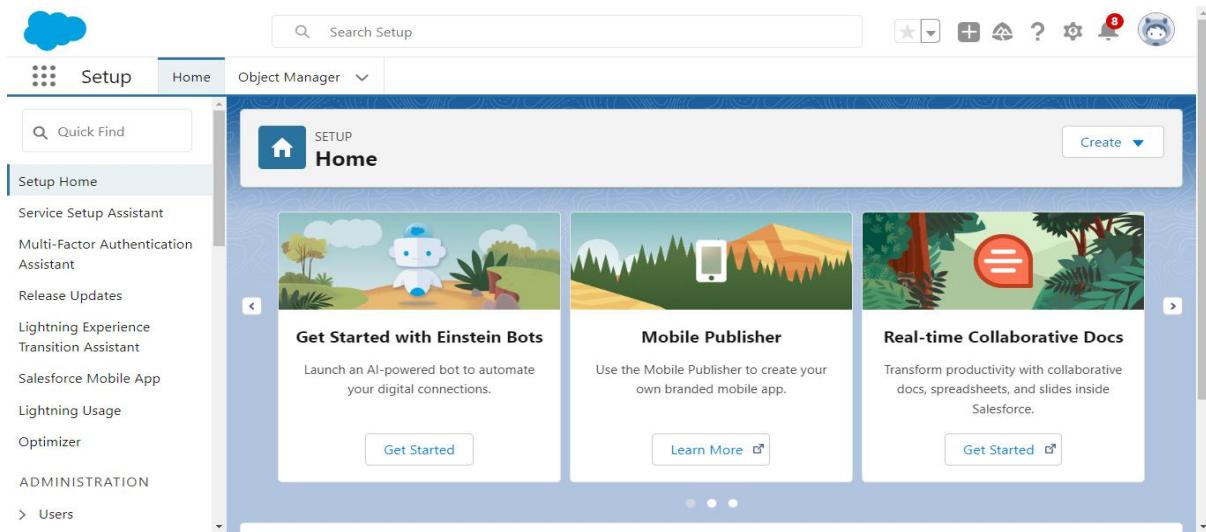


1.Click on Verify Account

2.Give a password and answer a security question and click on change password.

A screenshot of the Salesforce "Change Your Password" page. It shows fields for "New Password" and "Confirm New Password" (both with red boxes around them), a "Security Question" dropdown set to "In what city were you born?", and an "Answer" input field containing "asdfghjkl". A red box also surrounds the "Change Password" button at the bottom.

3.Then you will redirect to your salesforce setup page.



Milestone 2- Objects

Creating a Product Object

*To create an object: Product,Purchase Order, Order Item, Inventory Transaction and Supplier objects.

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orgfarm-a7c7f146dd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z35f/Details/view

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER
Purchase Order

Details

Description

API Name: Purchase_Order_c

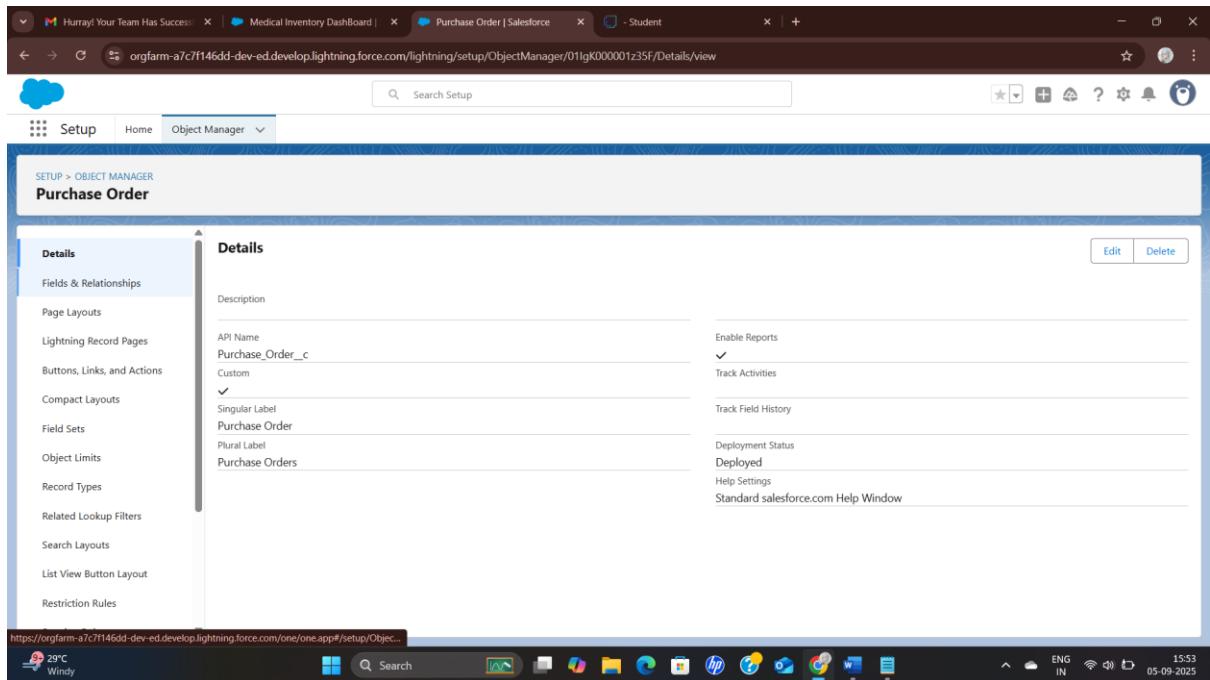
Custom: ✓
Singular Label: Purchase Order
Plural Label: Purchase Orders

Enable Reports: ✓
Track Activities
Track Field History
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

Edit Delete

https://orgfarm-a7c7f146dd-dev-ed.develop.lightning.force.com/one/one.app#/setup/Object...
29°C Windy

ENG IN 1553 05-09-2025



This screenshot shows the 'Purchase Order' object details in the Salesforce setup. The left sidebar lists various configuration tabs like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main pane displays the 'Details' tab, which includes fields for API Name (Purchase_Order_c), Singular Label (Purchase Order), and Plural Label (Purchase Orders). It also shows deployment status as 'Deployed'. The bottom status bar indicates it's 29°C and Windy.

Hurray! Your Team Has Success! | Medical Inventory Dashboard | Order Item | Salesforce - Student

orgfarm-a7c7f146dd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z3GX/Details/view

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER
Order Item

Details

Description

API Name: Order_Item_c

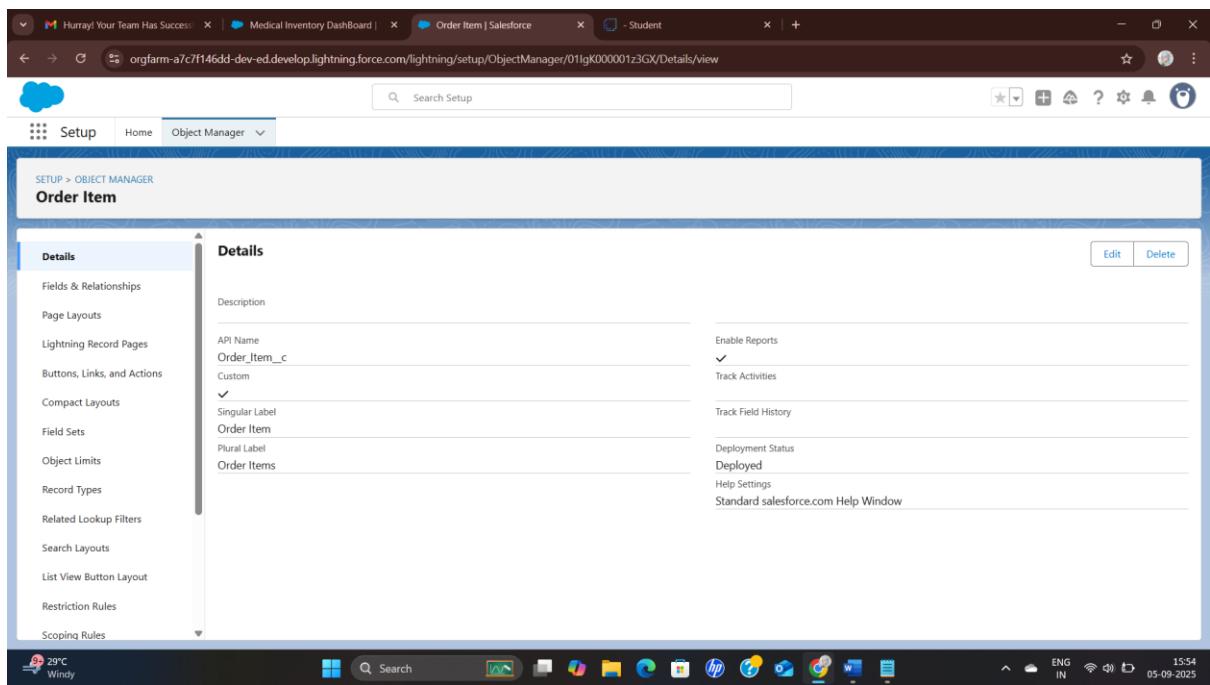
Custom: ✓
Singular Label: Order Item
Plural Label: Order Items

Enable Reports: ✓
Track Activities
Track Field History
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

Edit Delete

https://orgfarm-a7c7f146dd-dev-ed.develop.lightning.force.com/one/one.app#/setup/Object...
29°C Windy

ENG IN 1554 05-09-2025



This screenshot shows the 'Order Item' object details in the Salesforce setup. Similar to the Purchase Order, it has an API name of Order_Item_c, a singular label of Order Item, and a plural label of Order Items. The deployment status is also listed as 'Deployed'. The bottom status bar indicates it's 29°C and Windy.

The screenshot shows the Salesforce Setup interface with the title "SETUP > OBJECT MANAGER" and the object name "Inventory Transaction". The left sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main "Details" tab is selected, displaying fields such as API Name (Inventory_Transaction__c), Singular Label (Inventory Transaction), and Plural Label (Inventory Transactions). On the right, there are sections for Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The browser address bar shows the URL <https://orgfarm-a7cf146dd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z3I9/Details/view>. The system status bar at the bottom indicates it's 29°C Windy, ENG IN, and the date is 05-09-2025.

The screenshot shows the Salesforce Setup interface with the title "SETUP > OBJECT MANAGER" and the object name "Supplier". The left sidebar lists various configuration options. The main "Details" tab is selected, displaying fields such as API Name (Supplier__c), Singular Label (Supplier), and Plural Label (Suppliers). On the right, there are sections for Enable Reports (checked), Track Activities, Track Field History, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). The browser address bar shows the URL <https://orgfarm-a7cf146dd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z3Mz/Details/view>. The system status bar at the bottom indicates it's 29°C Windy, ENG IN, and the date is 05-09-2025.

Milestone 3- Tabs

Creating a tab for Product Object

*Create a tab for Product, Purchase Order, Order Item, Inventory Transaction and Supplier objects.

Custom Object Tabs

| Action | Label | Tab Style | Description |
|------------|------------------------|-------------|-------------|
| Edit Del | Inventory Transactions | Presenter | |
| Edit Del | Order Items | Pencil | |
| Edit Del | Products | Stethoscope | |
| Edit Del | Purchase Orders | Thermometer | |
| Edit Del | Suppliers | People | |

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Milestone 4- The Lightning App

Create a Lightning App for Medical Inventory Management

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: Enter a description...

App Branding

- Image:
- Primary Color Hex Value: #0070D2

Org Theme Options

Use the app's image and color instead of the org's custom theme.

App Launcher Preview

Milestone 5- Fields

Create a fields

*Create a field for Product,Purchase Order, Order Item, Inventory Transaction and Supplier objects.

| Object | Field Name | Data Type |
|-----------------------|-----------------------------|------------------------------------|
| Product | Product ID(Standard) | Text |
| | Product Name | Text |
| | Product Description | Text Area |
| | Minimum Stock Level | Number(18, 0) |
| | Current Stock Level | Number(18, 0) |
| | Unit Price | Currency(16, 2) |
| | Expiry Date | Date |
| Purchase Order | Purchase Order ID(Standard) | Text |
| | Supplier ID | Lookup(Supplier) |
| | Order Date | Date |
| | Expected Delivery Date | Date |
| | Actual Delivery Date | Date |
| | Order Count | Roll-Up Summary (COUNT Order Item) |
| | Total Order Cost | Currency(16, 2) |
| Order Item | Order Item ID(Standard) | Text |

| | | |
|------------------------------|--------------------------|-------------------------------|
| | Product ID | Lookup(Product) |
| | Purchase Order ID | Master-Detail(Purchase Order) |
| | Quantity Ordered | Number(18, 0) |
| | Quantity Received | Number(18, 0) |
| | Unit Price | Formula(Currency) |
| | Amount | Formula(Currency) |
| Inventory Transaction | Transaction ID(Standard) | Text |
| | Purchase Order ID | Lookup(Purchase Order) |
| | Transaction Date | Date |
| | Transaction Type | Picklist |
| | Total Order Cost | Formula(Currency) |
| Supplier | Supplier ID(Standard) | Text |
| | Supplier Name | Text |
| | Contact Person | Text |
| | Phone Number | Phone |
| | Email | Email |
| | Address | TextArea |

Fields & Relationships

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|---------------------|------------------------|--------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Current Stock Level | Current_Stock_Level__c | Number(18, 0) | | |
| Expiry Date | Expiry_Date__c | Date | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Minimum Stock Level | Minimum_Stock_Level__c | Number(18, 0) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Product Description | Product_Description__c | Text Area(255) | | |
| Product ID | Name | Text(80) | | ✓ |
| Product Name | Product_Name__c | Text(255) | | |
| Unit Price | Unit_Price__c | Currency(16, 2) | | |

*The same way to create the another (Purchase Order, Order Item, Inventory Transaction and Supplier) field objects.

Milestone 6 -Editing of Page Layouts

To edit a Page Layout

*To edit a Page Layout in Product,Purchase Order, Order Item, Inventory Transaction and Supplier objects.

Page Layouts

Layout Properties

| Field | Field Name | Description |
|---------------------|---------------------|---------------------|
| Section | Expiry Date | Product Description |
| Blank Space | Last Modified By | Product ID |
| Created By | Minimum Stock Level | Product Name |
| Current Stock Level | Owner | Unit Price |

Information (Header visible on edit only)

- Product ID: Sample Text
- Product Name: Sample Text
- Product Description: Sample Text
- Current Stock Level: 98,688
- Minimum Stock Level: 88,238
- Unit Price: \$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)

Mobile Cards (Salesforce mobile only)

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

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orgfarm-a7c7f146dd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z35F/PageLayouts/00hgK000006bKZQAY/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Purchase Order

Details Fields & Relationships Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

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

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

Quick Find Field Name * Expected Delivery... Purchase Order ID Blank Space Last Modified By Supplier ID Actual Delivery Date Order Count Total Order Cost Created By Order Date

Purchase Order Detail Standard Buttons Edit Delete Clone Change Owner Change Record Type Printable View Edit Labels Custom Buttons

Information (Header visible on edit only)
★ Purchase Order ID Sample Text
★ Supplier ID Sample Text
★ Order Date 9/5/2025
Expected Delivery Date 9/5/2025
Actual Delivery Date 9/5/2025
Total Order Cost \$123.45
★ Order Count Sample Text

Systems Information (Header visible on edit only)
Created By Sample Text Last Modified By Sample Text

Custom Links (Header visible on edit only)

29°C Windy Search ENG IN 16:43 05-09-2025

This screenshot shows the 'Purchase Order' page layout editor in the Salesforce Setup interface. The left sidebar lists various configuration options like Details, Fields & Relationships, and Page Layouts. The main area shows the 'Purchase Order Detail' layout with sections for Information, Systems Information, and Custom Links. Fields like Purchase Order ID, Supplier ID, Order Date, and Total Order Cost are displayed. The bottom status bar shows system information including temperature and date.

Hurray! Your Team Has Success! | Medical Inventory Dashboard | Order Item | Salesforce - Student

orgfarm-a7c7f146dd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z3GX/PageLayouts/00hgK000006m0IPQAY/view

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

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

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

Quick Find Field Name * Last Modified By Purchase Order ID Blank Space Order Count Quantity Ordered Amount Order Item ID Quantity Received Created By Product ID Unit Price

Information (Header visible on edit only)
★ Order Item ID Sample Text
Amount \$123.45
★ Purchase Order ID Sample Text
Order Count 17,215

product details
Product ID Sample Text
Unit Price \$123.45
Quantity Ordered 89,112
Quantity Received 26,454

Systems Information (Header visible on edit only)
Created By Sample Text Last Modified By Sample Text

Custom Links (Header visible on edit only)

29°C Windy Search ENG IN 16:43 05-09-2025

This screenshot shows the 'Order Item' page layout editor in the Salesforce Setup interface. Similar to the Purchase Order layout, it includes sections for Information, Systems Information, and Custom Links. Fields like Order Item ID, Purchase Order ID, and various quantity metrics are shown. The bottom status bar includes weather and system status information.

Hurray! Your Team Has Success! | Medical Inventory Dashboard | Inventory Transaction | Salesforce - Student

orgfarm-a7f146dd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z3I9/PageLayouts/00hgK000006m0NFQAv/view

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

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

Quick Find Field Name *
Section Last Modified By Transaction Date
Blank Space Owner
Created By Purchase Order ID
Inventory Transac... Total Order Cost

Inventory Transaction Detail
Standard Buttons Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels Custom Buttons

Information (Header visible on edit only)
Inventory Transaction ID Sample Text
Purchase Order ID Sample Text
Transaction Date 9/5/2025
Transaction Type Sample Text
Total Order Cost \$123.45
Owner Sample Text

System Information (Header visible on edit only)
Created By Sample Text
Last Modified By Sample Text

Custom Links (Header visible on edit only)

Mobile Cards (Salesforce mobile only)

29°C Windy Search ENG IN 16:44 05-09-2025

Hurray! Your Team Has Success! | Medical Inventory Dashboard | Supplier | Salesforce - Student

orgfarm-a7f146dd-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000001z3Mz/PageLayouts/00hgK000006m0VQAv/view

Setup Home Object Manager

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

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

Quick Find Field Name *
Section Created By Phone Number
Blank Space Email Supplier ID
Address Last Modified By Supplier Name
Contact Person Owner Supplier Name

Supplier Detail
Standard Buttons Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels Custom Buttons

Information (Header visible on edit only)
Supplier ID Sample Text
Supplier Name Sample Text
Contact Person Sample Text
Phone Number 1-415-555-1212
Email sarah.sample@company.com
Address Sample Text
Owner Sample Text

System Information (Header visible on edit only)
Created By Sample Text
Last Modified By Sample Text

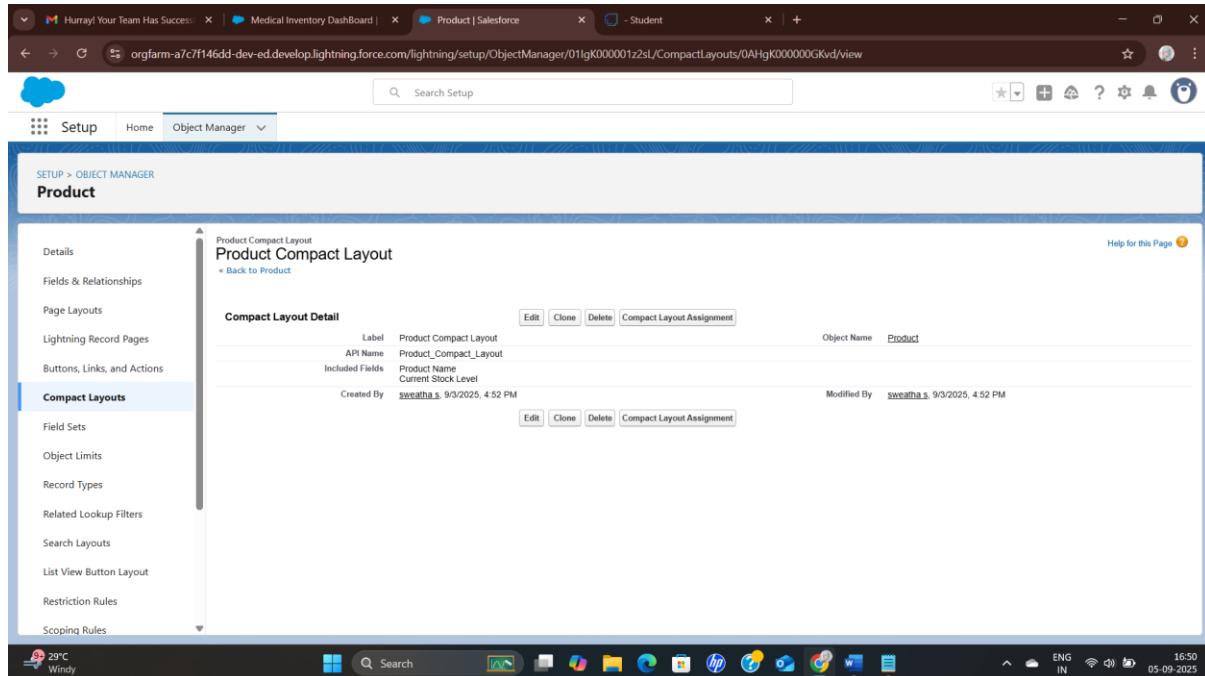
Custom Links (Header visible on edit only)

29°C Windy Search ENG IN 16:45 05-09-2025

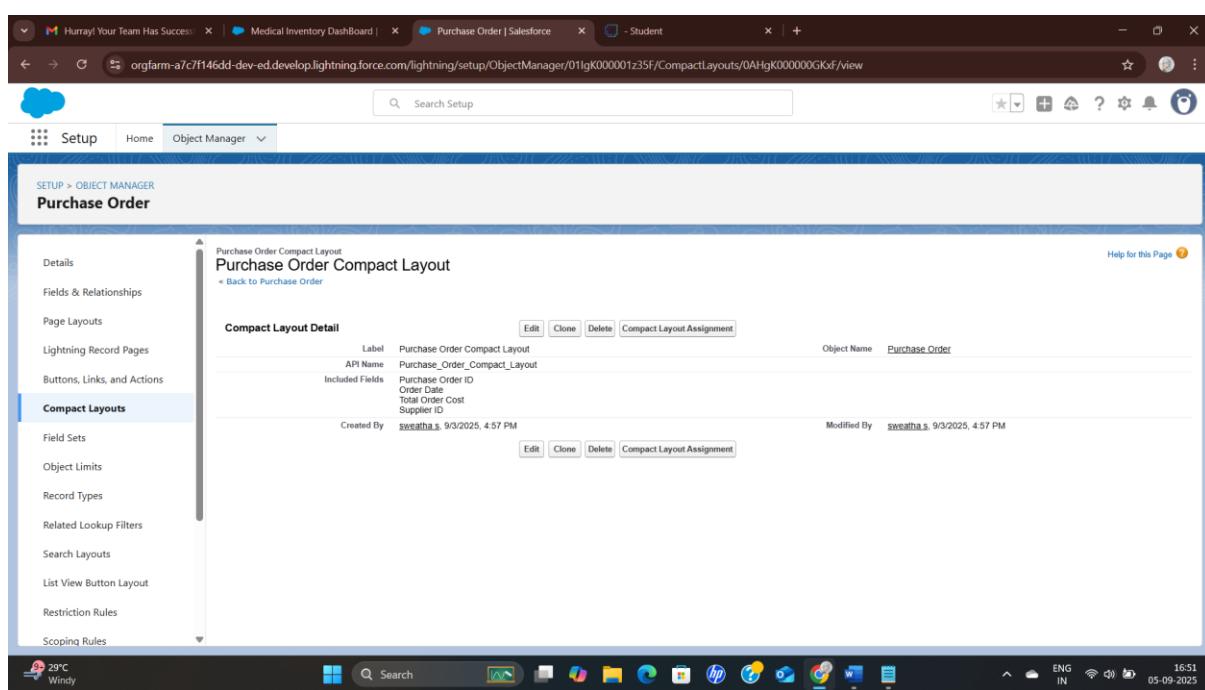
Milestone 7 - Compact Layouts

To create a Compact Layout

*To create a Compact Layout to a product and purchase order objects.



The screenshot shows the Salesforce Setup interface for creating a compact layout for the Product object. The left sidebar navigation bar is visible, with the 'Compact Layouts' option selected under the 'Product' section. The main content area displays the 'Product Compact Layout' detail page, which includes fields for Label (Product Compact Layout), API Name (Product_Compact_Layout), Included Fields (Product Name, Current Stock Level), and Created By (sweatha.s). The page also shows standard edit, clone, delete, and compact layout assignment buttons.



The screenshot shows the Salesforce Setup interface for creating a compact layout for the Purchase Order object. The left sidebar navigation bar is visible, with the 'Compact Layouts' option selected under the 'Purchase Order' section. The main content area displays the 'Purchase Order Compact Layout' detail page, which includes fields for Label (Purchase Order Compact Layout), API Name (Purchase_Order_Compact_Layout), Included Fields (Purchase Order ID, Order Date, Total Order Cost, Supplier ID), and Created By (sweatha.s). The page also shows standard edit, clone, delete, and compact layout assignment buttons.

Milestone 8 - Validation Rules

*To create an Expected Delivery Date Validation rule to a Employee Object

The screenshot shows the Salesforce Object Manager interface for the Purchase Order object. On the left, a sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area displays a 'Purchase Order Validation Rule' record. The 'Validation Rule Detail' section shows the following details:

| Field | Value |
|-------------------------|--|
| Rule Name | Expected_Delivery_Date_Validation |
| Error Condition Formula | (Expected_Delivery_Date__c - Order_Date__c) > 7 |
| Error Message | The Expected Delivery Date should not exceed 7 days. |
| Description | |
| Created By | sweatha.s. 9/3/2025, 5:04 PM |
| Modified By | sweatha.s. 9/3/2025, 5:04 PM |

The status is 'Active' with a checked checkbox. The page includes standard Salesforce navigation and a bottom taskbar.

Milestone 9 – Profiles

To create Profiles

*To create a Inventory Manager and Purchase Manager profiles.

The screenshot shows the Salesforce Setup Profiles screen. The left sidebar lists categories like Users, Data, Marketing, Sales, Products, and Service. The 'Profiles' section is selected. In the center, a 'Profile Edit' form is displayed for the 'Inventory Manager' profile. The form includes fields for Name (Inventory Manager), User License (Salesforce), and Description. The 'Custom App Settings' section contains numerous checkboxes for various apps, many of which are checked. The 'Service Provider Access' section includes a 'Tab Settings' section with a checkbox for 'Override users' personal tab customizations'. The bottom of the screen shows a standard Windows taskbar.

Hurray! Your Team Has Success! | Medical Inventory Dashboard | Profiles | Salesforce - Student

Search Setup

Setup Home Object Manager

Q pro

SETUP Profiles

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 Editions

29°C Windy

Data Share Targets

Data Share Target Connection

Work Types

Work Type Groups

Custom Object Permissions

| Object | Basic Access | | | | | Data Administration | | | | | | | | |
|------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| | Read | Create | Edit | Delete | View All Records | Modify All Records | View All Fields | Read | Create | Edit | Delete | View All Records | Modify All Records | View All Fields |
| Inventory Transactions | <input checked="" type="checkbox"/> |
| Order Items | <input checked="" type="checkbox"/> |
| Products | <input checked="" type="checkbox"/> |

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: None

Password Policies

| | |
|---|---|
| User passwords expire in: | Never expires |
| Enforce password history: | 3 passwords remembered |
| Minimum password length: | 8 |
| Password complexity requirement: | Must include alpha and numeric characters |
| Password question requirement: | Cannot contain password |
| Maximum invalid login attempts: | 10 |
| Lockout effective period: | 15 minutes |
| Obfuscate secret answer for password resets: | <input type="checkbox"/> |
| Require a minimum 1 day password lifetime: | <input type="checkbox"/> |
| Don't immediately expire links in forgot password emails: | <input type="checkbox"/> |

Save Save & New Cancel

ENG IN 16:57 05-09-2025

Hurray! Your Team Has Success! | Medical Inventory Dashboard | Profiles | Salesforce - Student

Search Setup

Setup Home Object Manager

Q pro

SETUP Profiles

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 Editions

29°C Windy

Profile Edit Purchase Manager

Set the permissions and page layouts for this profile.

Profile Edit

Name: Purchase Manager

User License: Salesforce

Description:

Custom Profile:

Custom App Settings

| Custom App | Visible | Default | Visible | Default | |
|---|-------------------------------------|-------------------------------------|--|-------------------------------------|-----------------------|
| All Tabs (standard_AltTabSet) | <input checked="" type="checkbox"/> | <input type="radio"/> | My Service Journey (standard_MTabApp) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Analytics Studio (standard_Insight) | <input checked="" type="checkbox"/> | <input type="radio"/> | Queue Management (standard_QueueManagement) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| App Launcher (standard_AppLauncher) | <input checked="" type="checkbox"/> | <input type="radio"/> | Sales (standard_Sales) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Approvals (standard_Approvals) | <input checked="" type="checkbox"/> | <input type="radio"/> | Sales Cloud Mobile (standard_SalesCloudMobile) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Automation (standard_FlowApp) | <input checked="" type="checkbox"/> | <input type="radio"/> | Sales Console (standard_LightingConsole) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Built Solutions (standard_LightingGrid) | <input checked="" type="checkbox"/> | <input type="radio"/> | Salesforce Chatter (standard_Chatter) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Community (standard_Community) | <input checked="" type="checkbox"/> | <input type="radio"/> | Service Console (standard_ServiceConsole) | <input type="checkbox"/> | <input type="radio"/> |
| Content (standard_Content) | <input checked="" type="checkbox"/> | <input type="radio"/> | Service (standard_Service) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Data Cloud (standard_Audience360) | <input checked="" type="checkbox"/> | <input type="radio"/> | Service Console (standard_LightingService) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Data Manager (standard_DatabaseManager) | <input checked="" type="checkbox"/> | <input type="radio"/> | Site.com (standard_Site) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Digital Experiences (standard_SitecoreXM) | <input checked="" type="checkbox"/> | <input type="radio"/> | Subscription Management (standard_RevenueCloudConsole) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Lightning Usage App (standard_LightingUsageAutomation) | <input checked="" type="checkbox"/> | <input type="radio"/> | WDC (standard_Work) | <input checked="" type="checkbox"/> | <input type="radio"/> |
| Marketing CRM Classic (standard_Marketing) | <input checked="" type="checkbox"/> | <input type="radio"/> | | | |
| Medical Inventory Management (Medical_Inventory_Management) | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | |

Service Provider Access

Tab Settings

Overwrite users' personal tab customizations: Default On:

Standard Tab Settings

ENG IN 17:02 05-09-2025

Custom Object Permissions

| Object | Basic Access | | | | Data Administration | | | |
|------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|--|
| | Read | Create | Edit | Delete | View All Records | Modify All Records | View All Fields | |
| Inventory Transactions | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Order Items | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Products | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Purchase Orders | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Suppliers | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |

Session Settings

Session Times Out After: 2 hours of inactivity

Password Policies

- User passwords expire in: Never expires
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obfuscate secret answer for password resets
- Require a minimum 1 day password lifetime
- Don't immediately expire links in forgot password emails

Milestone 10 - Roles

Create a Roles

*Create a roles for Purchasing Manager and Inventory Manager.

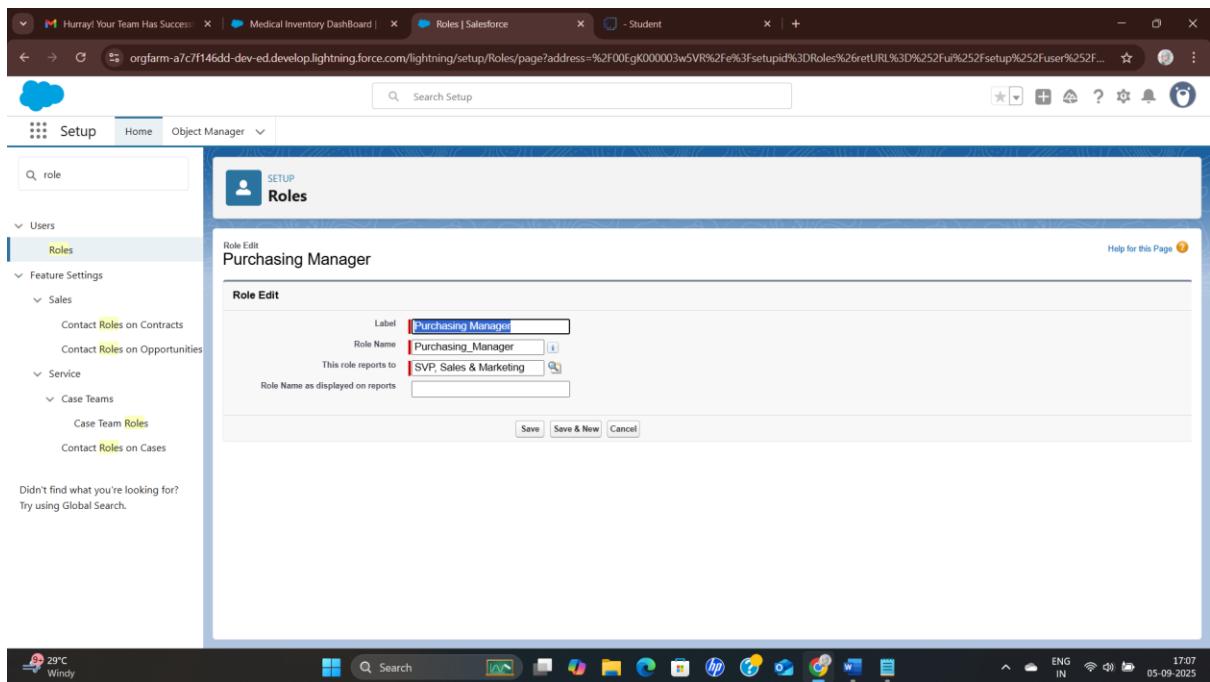
Role Edit

Inventory Manager

Role Edit

| | |
|-----------------------------------|---|
| Label | <input type="text" value="Inventory Manager"/> |
| Role Name | <input type="text" value="Inventory_Manager"/> |
| This role reports to | <input type="text" value="SVP, Sales & Marketing"/> |
| Role Name as displayed on reports | <input type="text"/> |

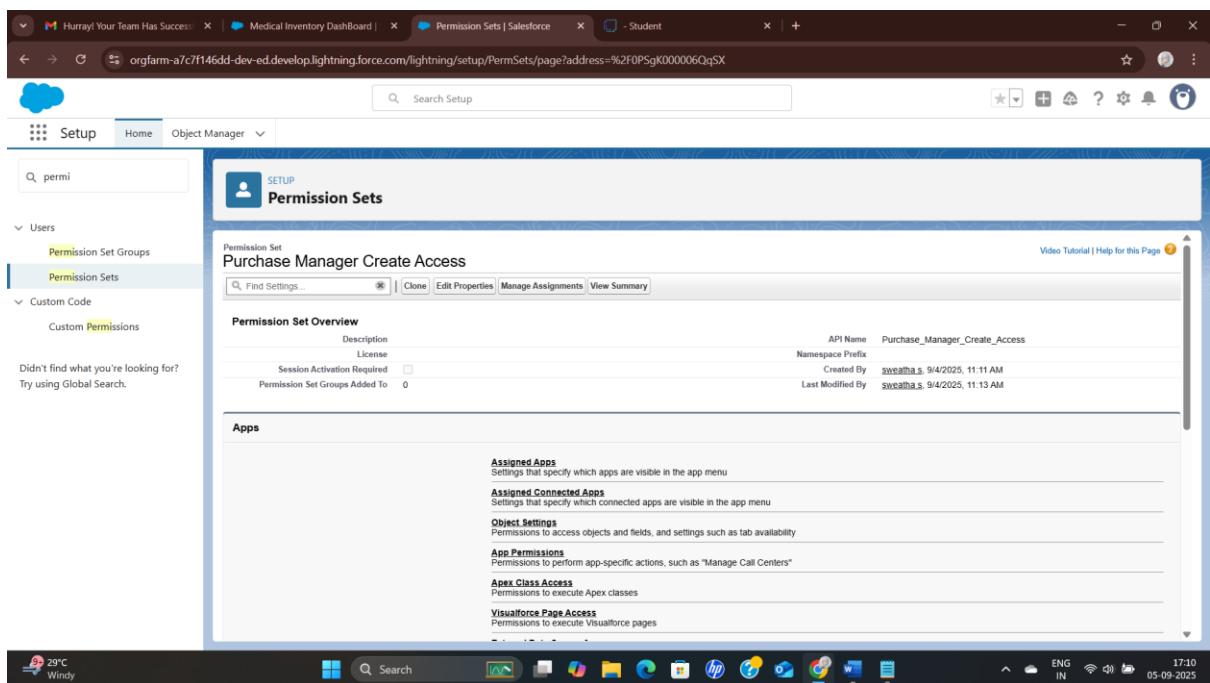
Save Save & New Cancel



Milestone 12 - Permission Sets

Create a Permission Set

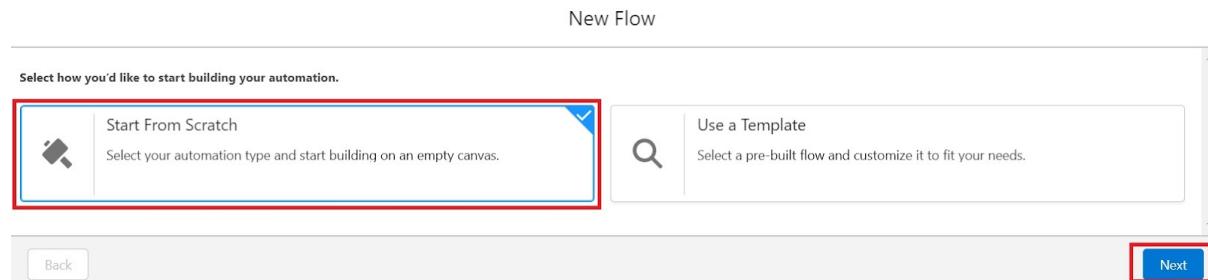
*Create a Purchase Manager Create Access to permission sets.



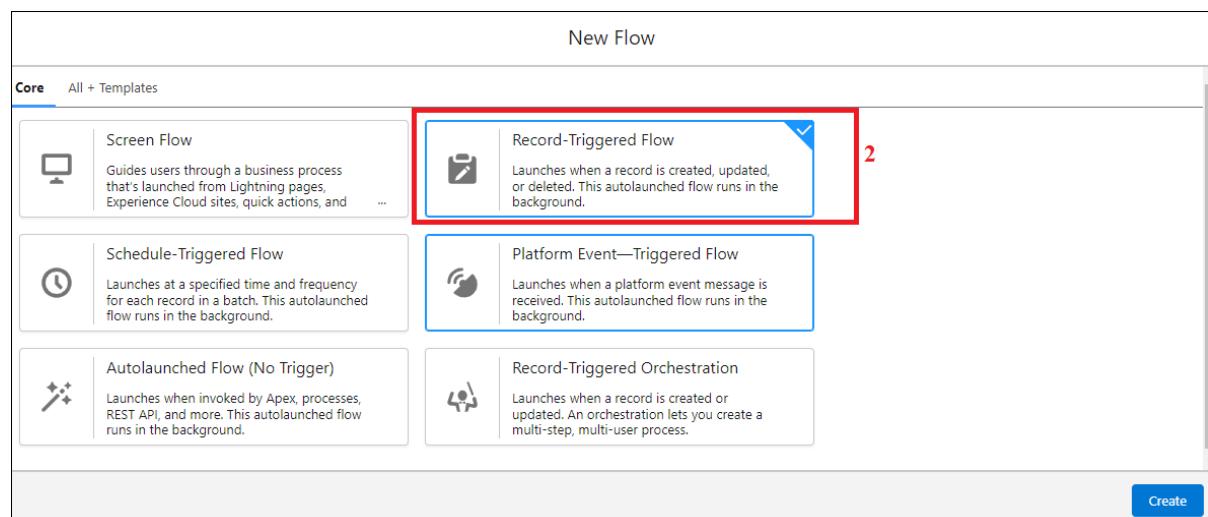
Milestone 13 – Flows

*Create Flow to update the Actual Delivery Date.

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow >> Start From Scratch .



2. Select the record Triggered flow.Click on create.



3. Under Object select “Purchase Order”

4. Select A record is created or updated

Configure Start

Select Object

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

* Object **Purchase Order** 3

Configure Trigger

* Trigger the Flow When:

A record is created

A record is updated

A record is created or updated 4

A record is deleted

5. Set Entry Conditions : None
6. Select Fast Field Updates and click on Done

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.

Condition Requirements

None

5

*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, like send an email. This more flexible flow runs *after* the record is saved to the database.

6

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

7. Under the record trigger flow click on the “+” icon and select Get Records.
8. Enter Label as “ Get Purchase Record ”.
9. For Object select Purchase Order.
10. For Condition Requirements , select All Conditions are Met(AND)

For the first condition select as follows:

Field: Id
Operator: Equals
Value: {!\$Record.Id}

* 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 Id | Operator Equals | Value Aa \$Record > Record ID |
|-------------|--------------------|----------------------------------|

+ Add Condition

11. For How many Records to store Select Only the First Record.
12. For How to Store Record Data select Choose fields and let Salesforce do the rest. Select Field: Order_Date__c. Click on Done.

How Many Records to Store

Only the first record

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

13. In the Flow Builder, click on the Manager tab on the left-hand side >> Click on New Resource >> In the Resource Type dropdown, select Variable.
14. Enter API name as ActualDeliveryDate >> Select Data type as Date >> Click on Done.
15. From the Toolbox drag and drop Assignment element.
16. Enter the label as “Assignment”.
17. Set Variable Values:
 - a) Variable : {!ActualDeliveryDate}

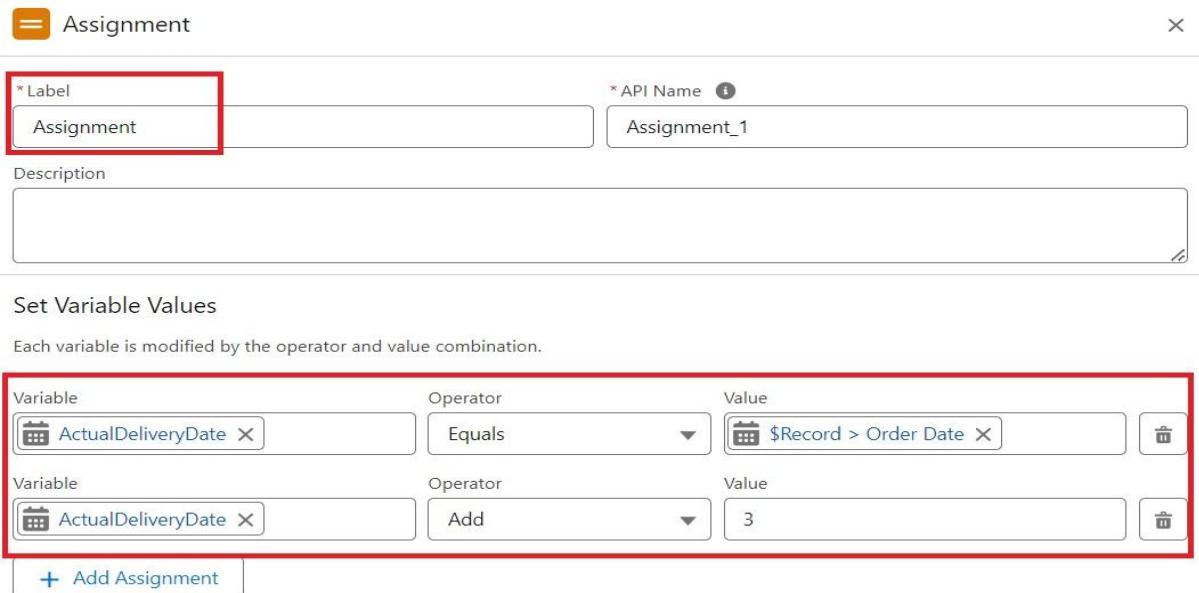
Operator : Equals

Value : {!\$Record.Order_Date__c}

b) Variable : {!ActualDeliveryDate}

Operator : Add

Value : 3

Assignment

* Label **Assignment** * API Name **Assignment_1**

Description

Set Variable Values

Each variable is modified by the operator and value combination.

| Variable | Operator | Value |
|--------------------|----------|-----------------------|
| ActualDeliveryDate | Equals | \$Record > Order Date |
| ActualDeliveryDate | Add | 3 |

+ Add Assignment

18. Click Done

19. From the Toolbox drag and drop Update Records element and connect to the Assignment element.

20. Enter the label as “Updating Purchasing Order”.

21. How to Find Records to Update and Set Their Values : Use the Purchase Order record that triggered the flow

22. Set Filter Conditions : None -Always Update Record

23. Set Field Values for the Trip Record as

Field : Actual_Delivery_Date__c

Value : {!ActualDeliveryDate}

Update Records

* How to Find Records to Update and Set Their Values

- Use the purchase order record that triggered the flow
- Update records related to the purchase order record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Info Because this flow runs *before* a record is saved, you can only update the record that triggered the flow to run. To update other records, configure the trigger to run the flow *after* the record is saved.

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Purchase Order Record

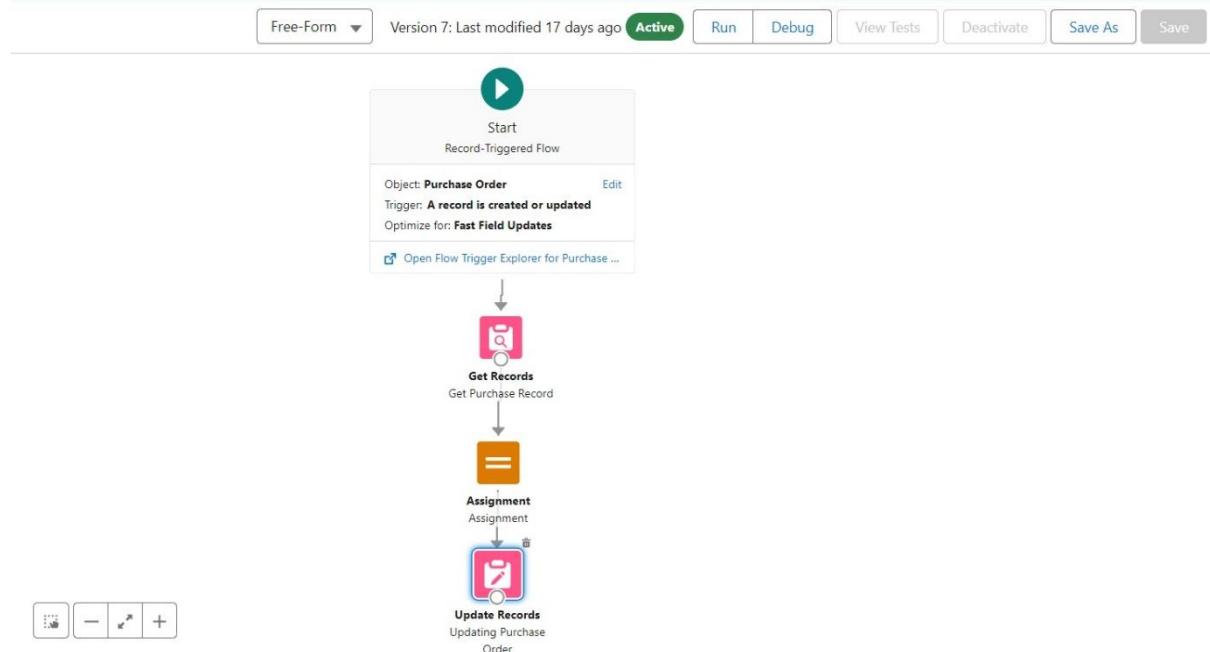
| Field | Value |
|-------------------------|--------------------|
| Actual_Delivery_Date__c | ActualDeliveryDate |

+ Add Field

24. Click Done

25. Save the flow as “Actual Delivery Date Updating”.

26. Activate the flow.



Milestone 14 - Triggers

Create a Trigger to Calculate total amount on Order Item

Step 1 : Login to Salesforce:

Log in to your Salesforce account with administrative privileges.

Step 2:

i) Navigate to Setup: Once logged in, click on the gear icon ?? (Setup) located at the top-right corner of the page. This will open the Setup menu.

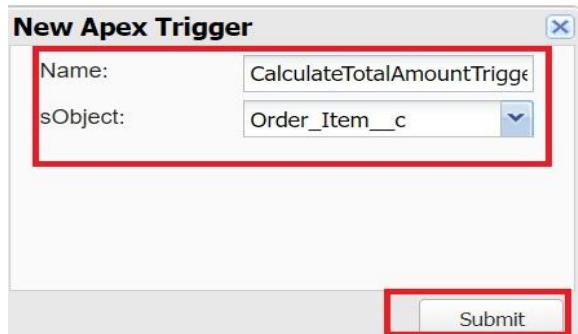
ii) Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

Step 3:

i) In the Developer Console window, go to the top menu and click on "File".

ii) Select New: From the dropdown menu under "File", select "New".

iii) Choose Apex Trigger: This will open a new Apex Trigger editor tab.



Create an Apex Trigger:

```
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);  
}
```

Step 4:

i) In the Developer Console window, go to the top menu and click on "File".

ii)Select New: From the dropdown menu under "File", select "New".

iii)Choose Apex Class: Name it as CalculateTotalAmountHandler

```
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_cost__c = purchaseToUpdateMap.get(purchaseOrderId));
    purchaseToUpdate.add(purchaseOrder);
}

// Update Purchase Orders if there are any changes
if (!purchaseToUpdate.isEmpty()) {
    update purchaseToUpdate;
}

```

}

}

}

}

Save it.

Milestone 15 – Reports

*Create a Purchase Orders based on Suppliers(Summary) Report

The screenshot shows the Salesforce Report Builder interface. The title bar indicates the URL is orgfarm-a7c7f146dd-dev-ed.lightning.force.com/lightning/r/Report/00OgK000004mJxUAU/edit?queryScope=userFolders. The main area displays a report titled "Purchase Orders based on Suppliers". The report builder interface includes sections for "Fields", "REPORT", and "Row Counts". In the "Fields" section, there are "Groups" and "Columns" sections. Under "Groups", "Supplier ID" and "Purchase Order ID" are listed. Under "Columns", "Order Count: Order Item ID" and "# Total Order Cost" are listed. The "REPORT" section shows a preview of the report with filters set to "Supplier ID: Supplier ID" and "Purchase Order ID". The "Row Counts" section has checkboxes for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total", all of which are checked. The bottom of the screen shows the Windows taskbar with various icons and system status information.

*Create a Complete Purchase Details Report

The screenshot shows the Salesforce Report Builder interface. The report title is "Purchase Order with Order Items with Purchase Orders". The left sidebar shows fields grouped by "Supplier ID", "Actual Delivery Date", and "Purchase Order ID". The columns section includes "Product ID: Product Name", "# Order Count", "# Quantity Received", "# Amount", and "Product ID". The top right has buttons for "Add Chart", "Save & Run", "Save", "Close", and "Run". A message at the top says "No records returned in preview. Try running the report or editing report filters." The bottom status bar shows the date as 05-09-2025.

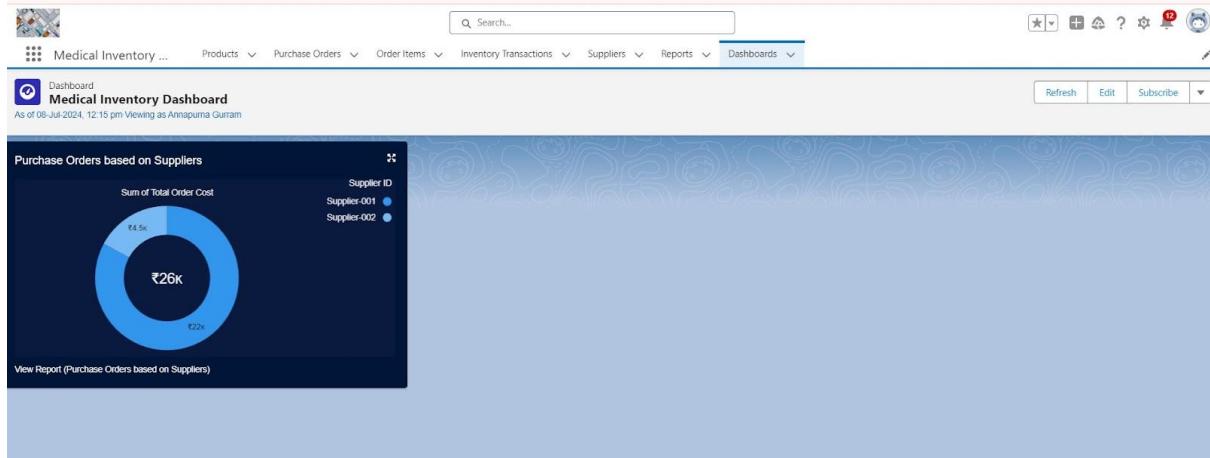
Milestone 16 – Dashboards

Create Dashboard

*Create Dashboard is Medical Inventory DashBoard

The screenshot shows the "Medical Inventory DashBoard". It features two chart cards: "Purchase Orders based on Suppliers" and "Complete Purchase Details Report", both of which display the message "We can't draw this chart because there is no data." The dashboard also shows the date as As of Sep 5, 2025, 12:15 AM. The bottom status bar shows the date as 05-09-2025.

*Then insert the data in purchase orders based on suppliers and complete purchase details report.



Conclusion:

A Medical Inventory Management System on Salesforce improves efficiency, accuracy, and accessibility of medical supplies management. While it requires investment and training, the benefits of automation, real-time tracking, and integration make it a valuable tool for healthcare organizations aiming to enhance patient care and reduce costs.