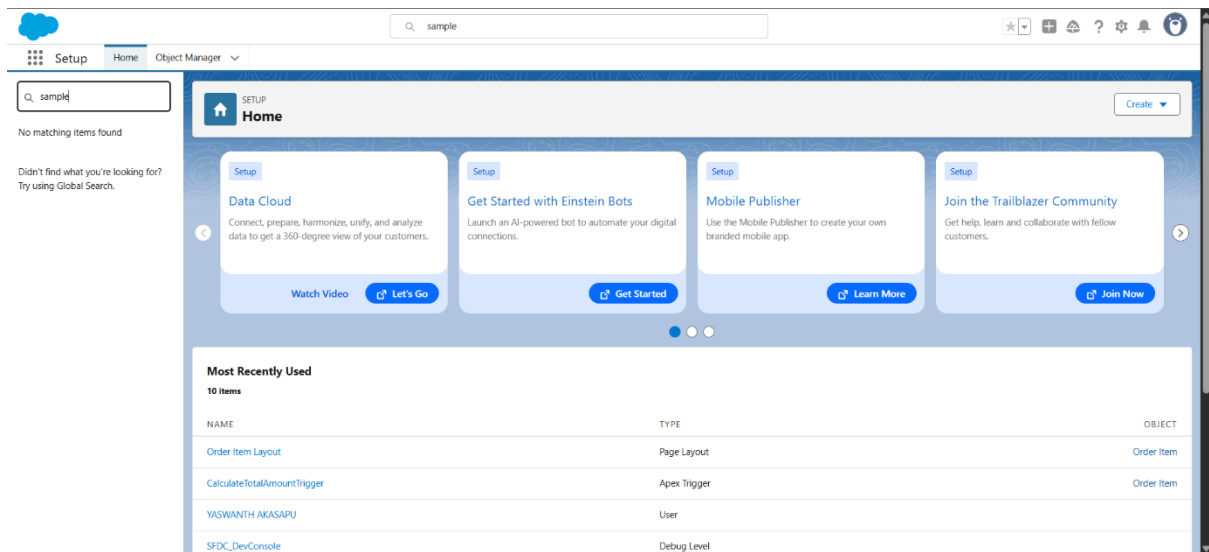
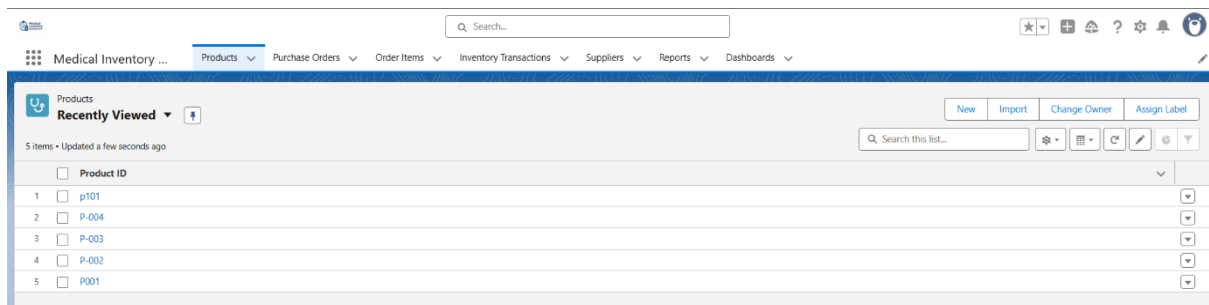


1. Login & App Launcher :

1: Salesforce homepage after login

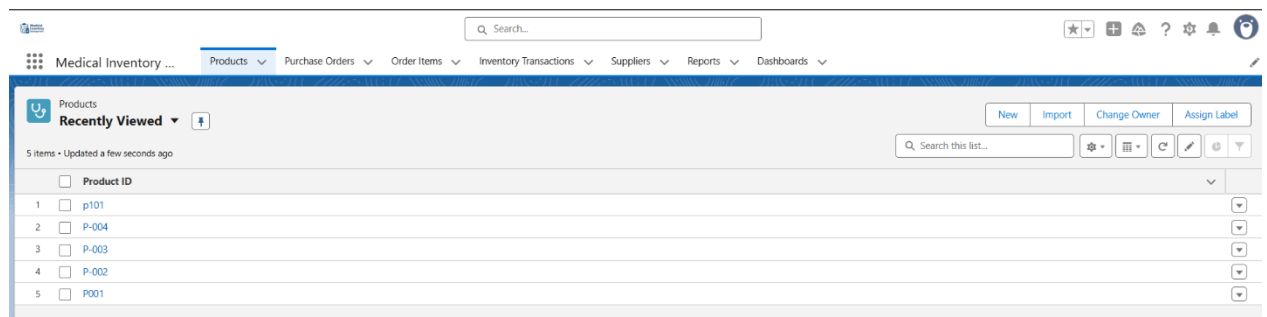


2: App Launcher > Medical Inventory Management app selected.

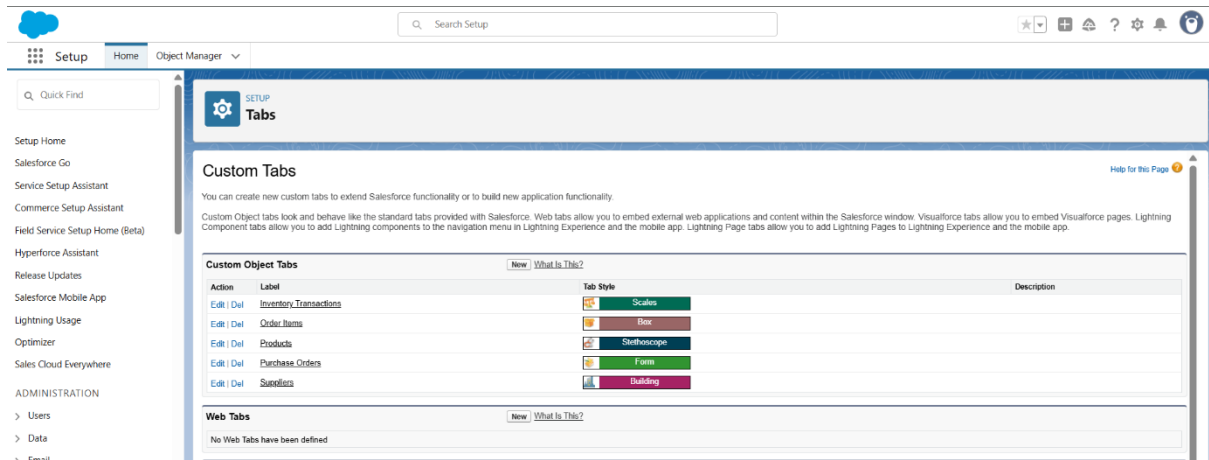


2. Key Tabs and Navigation

1: Home screen of the Medical Inventory Management app



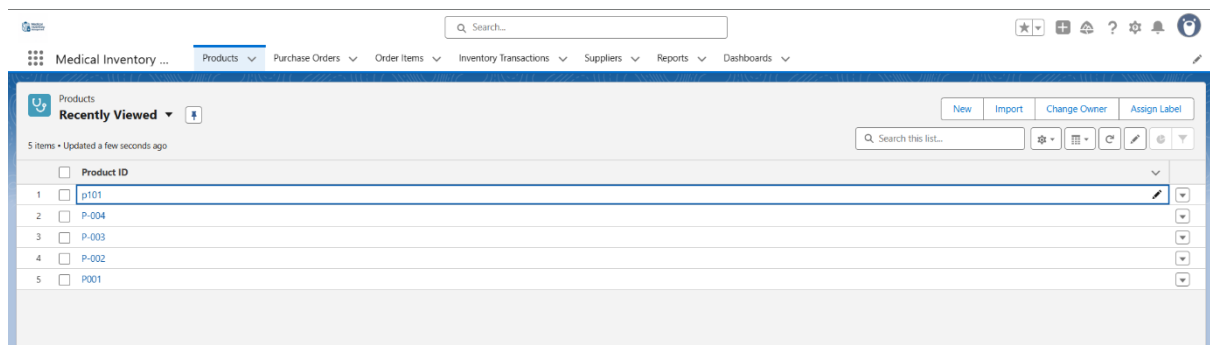
2: Tabs for Products, Suppliers, Purchase Orders, Order Items, Inventory Transactions



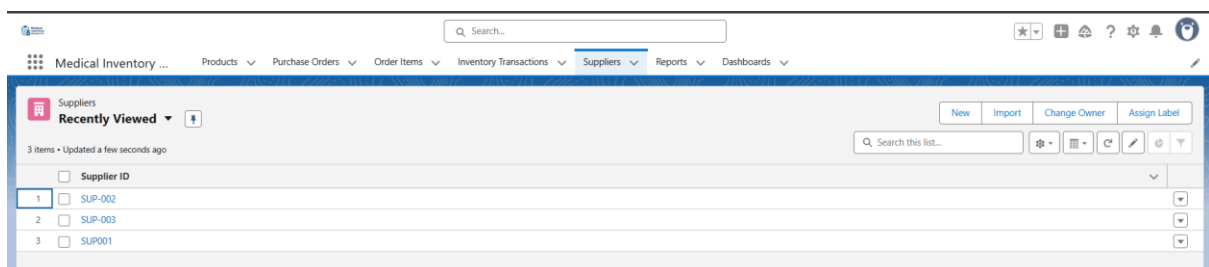
3. Objects & Records

Each object's list view with some records:

1: Products list showing 3+ products with Unit Price, Stock Levels.



2. Suppliers list with Supplier Name, Address, Contact Person



3. Purchase Orders list showing PO ID, Supplier, Total Cost

	<input type="checkbox"/>	Purchase Order ID	
1	<input type="checkbox"/>	po1	
2	<input type="checkbox"/>	PO-004	
3	<input type="checkbox"/>	PO-003	
4	<input type="checkbox"/>	PO001	
5	<input type="checkbox"/>	PO-002	

4. Order Items list showing Product, Quantity, Amount

	<input type="checkbox"/>	Order Item ID	
1	<input type="checkbox"/>	OI111	
2	<input type="checkbox"/>	ot1	
3	<input type="checkbox"/>	OI-007	
4	<input type="checkbox"/>	OI-006	
5	<input type="checkbox"/>	OI-001	
6	<input type="checkbox"/>	OI-005	
7	<input type="checkbox"/>	OI-004	
8	<input type="checkbox"/>	OI-003	
9	<input type="checkbox"/>	OI-002	

5. Inventory Transactions list with Type (Issue, Receipt), Date

	<input type="checkbox"/>	Inventory Transaction ID	
1	<input type="checkbox"/>	IT1	
2	<input type="checkbox"/>	IT-1005	
3	<input type="checkbox"/>	IT-1004	
4	<input type="checkbox"/>	IT-1003	
5	<input type="checkbox"/>	IT-1002	
6	<input type="checkbox"/>	IT001	

4. Detailed Record View (Record Page Layout)

1. One Product record – show all fields like Product Name, Stock Level, Min Stock, Unit Price

The screenshot shows the 'Edit p101' form for a product record. The form is titled 'Edit p101' and includes a search bar at the top. The left sidebar shows a list of products under 'Recently Viewed'. The main form fields are:

- *Product ID: p101
- *Unit Price: \$1.00
- *Product Name: Doko 150
- Current Stock Level: (empty)
- Product Description: (empty)
- *Minimum Stock Level: 200
- Owner: YASWANTH AKASAPU
- Created By: YASWANTH AKASAPU, 6/28/2025, 2:24 AM
- Last Modified By: YASWANTH AKASAPU, 6/28/2025, 2:24 AM

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

2. One Supplier record – show all fields like Name, Contact, Email

The screenshot shows the 'Edit SUP-002' form for a supplier record. The form is titled 'Edit SUP-002' and includes a search bar at the top. The left sidebar shows a list of suppliers under 'Recently Viewed'. The main form fields are:

- *Supplier ID: SUP-002
- *Phone Number: 9123456780
- *Supplier Name: CarePlus Distributors
- Email: anita@careplus.in
- *Contact Person: Anita Mehta
- Address: 45 Wellness Road, Bengaluru, Karnataka
- Owner: YASWANTH AKASAPU
- Created By: YASWANTH AKASAPU, 6/24/2025, 6:17 AM
- Last Modified By: YASWANTH AKASAPU, 6/24/2025, 6:17 AM

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

3. One Purchase Order record – show Actual & Expected Delivery Dates, Total Cost

The screenshot shows the 'Edit po1' form for a purchase order record. The form is titled 'Edit po1' and includes a search bar at the top. The left sidebar shows a list of purchase orders under 'Recently Viewed'. The main form fields are:

- *Purchase Order ID: po1
- Actual Delivery Date: 7/1/2025
- *Supplier ID: SUP-002
- Order Date: 6/28/2025
- Expected Delivery Date: 6/30/2025
- Total Order Cost Manual: \$100.00
- Order Count: 2
- Total Order Cost: 100
- Owner: YASWANTH AKASAPU
- Created By: YASWANTH AKASAPU, 6/28/2025, 2:30 AM
- Last Modified By: YASWANTH AKASAPU, 6/28/2025, 3:08 AM

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

4. One Order Item – Product, Quantity Ordered/Received, Amount

Medical Inventory ...

Products

Purchase Orders

Order Items

Inventory Transactions

Suppliers

Reports

Dashboards

Search...

Order Items

Recently Viewed

9 items • Updated a few seconds ago

Order Item ID

1 ☐ OI111

2 ☐ oi1

3 ☐ OI-007

4 ☐ OI-006

5 ☐ OI-001

6 ☐ OI-005

7 ☐ OI-004

8 ☐ OI-003

9 ☐ OI-002

Edit OI111

* Order Item ID

Purchase Order

Amount
This field is calculated upon save

Product Details

* Product

* Quantity Ordered

Unit Price
This field is calculated upon save

Quantity Received

Created By

Last Modified By

Cancel

Save & New

Save

5. Reports

1. "Purchase Orders based on Suppliers" report – summary format

Medical Inventory ...

Products

Purchase Orders

Order Items

Inventory Transactions

Suppliers

Reports

Dashboards

Search...

Report: Purchase Orders

Purchase Orders based on Suppliers

Enable Field Editing

Q

Add Chart

▼

⌂

Edit

▼

Total Records

5

Total Order Count

9

Total Total Order Cost

520

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
<input type="checkbox"/> SUP001 (2)	PO001 (1)	1	10
	PO-002 (1)	2	350
<input type="checkbox"/> SUP-002 (2)	PO-003 (1)	3	40
	po1 (1)	2	100
<input type="checkbox"/> SUP-003 (1)	PO-004 (1)	1	20
Total (5)		9	520

2. "Complete Purchase Details Report" – grouped by Supplier ID, showing Product, Quantity, Amount

Medical Inventory ...

Products

Purchase Orders

Order Items

Inventory Transactions

Suppliers

Reports

Dashboards

Search...

Report: Purchase Orders with Order Items and Product

Complete Purchase Details Report

Enable Field Editing

Q

Add Chart

▼

⌂

Edit

▼

Total Records

9

Total Order Count

520

Total Quantity Received

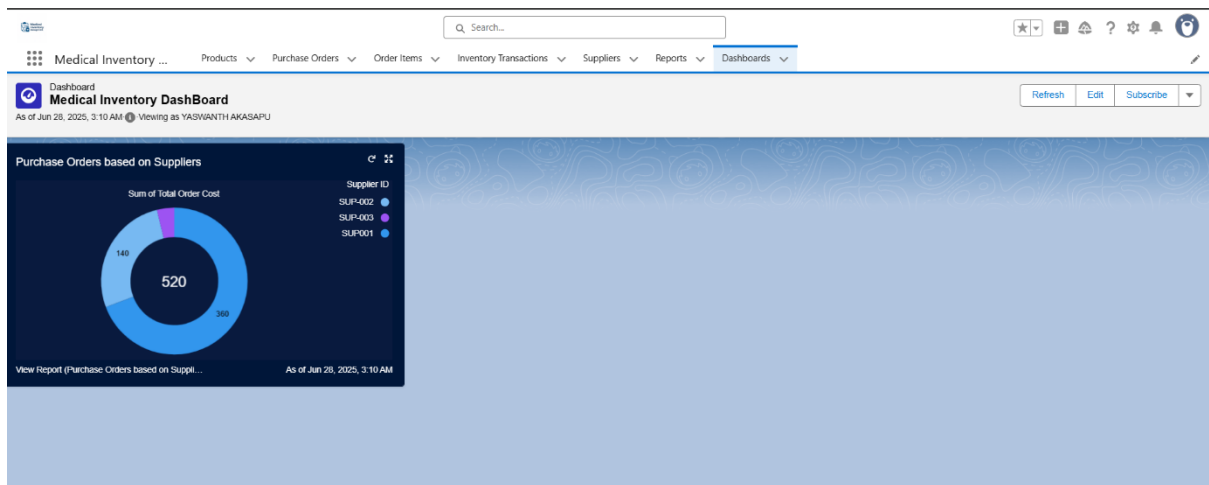
Total Amount

\$1,005.00

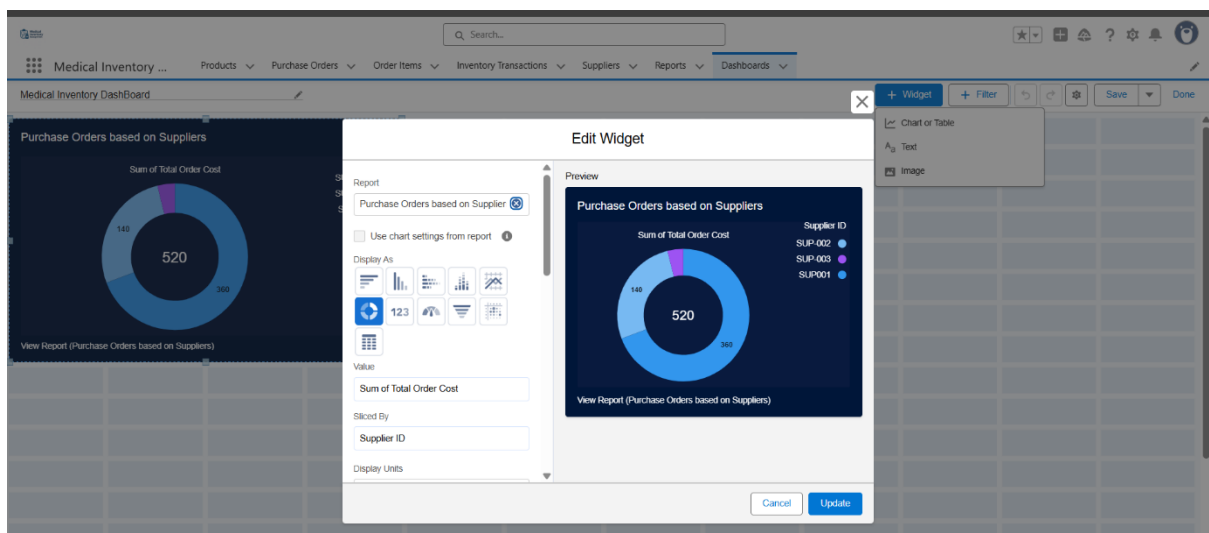
Supplier ID	Actual Delivery Date	Purchase Order: Purchase Order ID	Product: Product ID	Product: Product Name	Order Count	Quantity Received	Amount
<input type="checkbox"/> SUP001 (3)	6/27/2025 (3)	PO001 (1)	P001	Digital Thermometer	1	10	\$150.00
		Subtotal			1	10	\$150.00
		PO-002 (2)	P-002	Paracetamol	2	300	\$300.00
			P-003	Face Masks	2	50	\$100.00
		Subtotal			2	350	\$400.00
Subtotal					3	360	\$850.00
					3	360	\$850.00
<input type="checkbox"/> SUP-002 (5)	6/28/2025 (3)	PO-003 (3)	P-002	Paracetamol	3	10	\$10.00
			P001	Digital Thermometer	3	5	\$75.00
			P-004	Hand Sanitizer 500ml	3	25	\$150.00
		Subtotal			3	40	\$235.00
					3	40	\$235.00
	7/4/2025 (2)	po1 (2)	p101	Dole 150	2	-	\$0.00
			p101	Dole 150	2	100	\$100.00
		Subtotal			2	100	\$100.00
Subtotal					2	100	\$100.00

6. Dashboard

1. “Medical Inventory Dashboard” – show donut chart or bar graph.

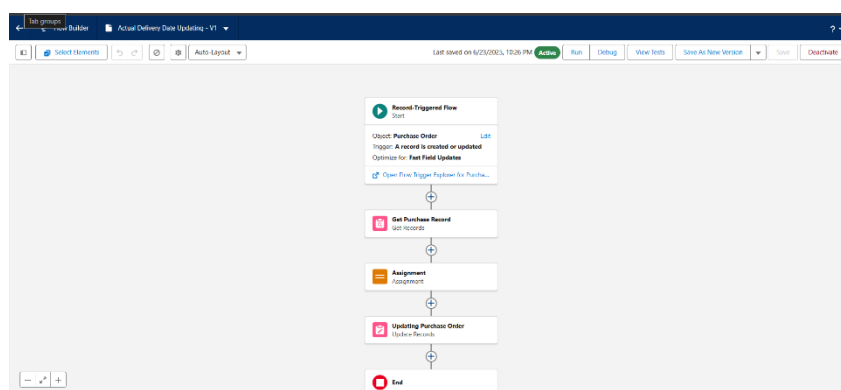


2. Click into widget to show underlying report



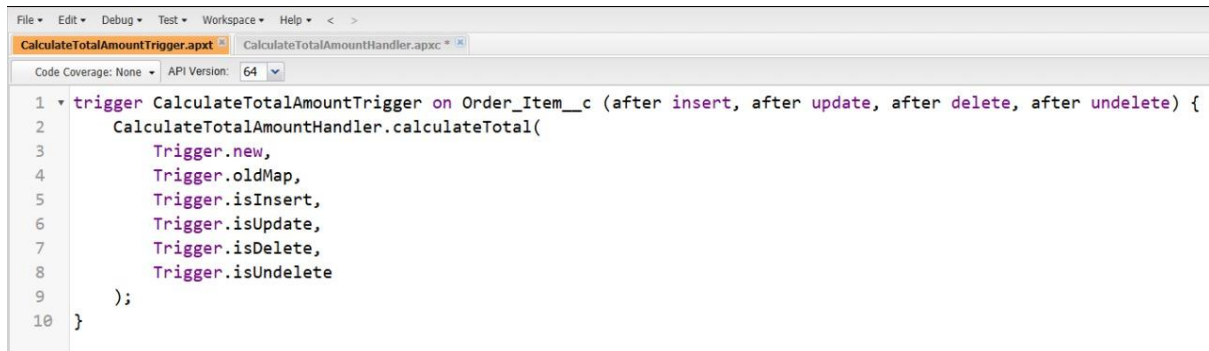
7. Automation/Flow & Trigger

1. Open Flow Builder – show Actual Delivery Date Flow



2. Developer Console > Apex Trigger and Apex Class (trigger + handler)

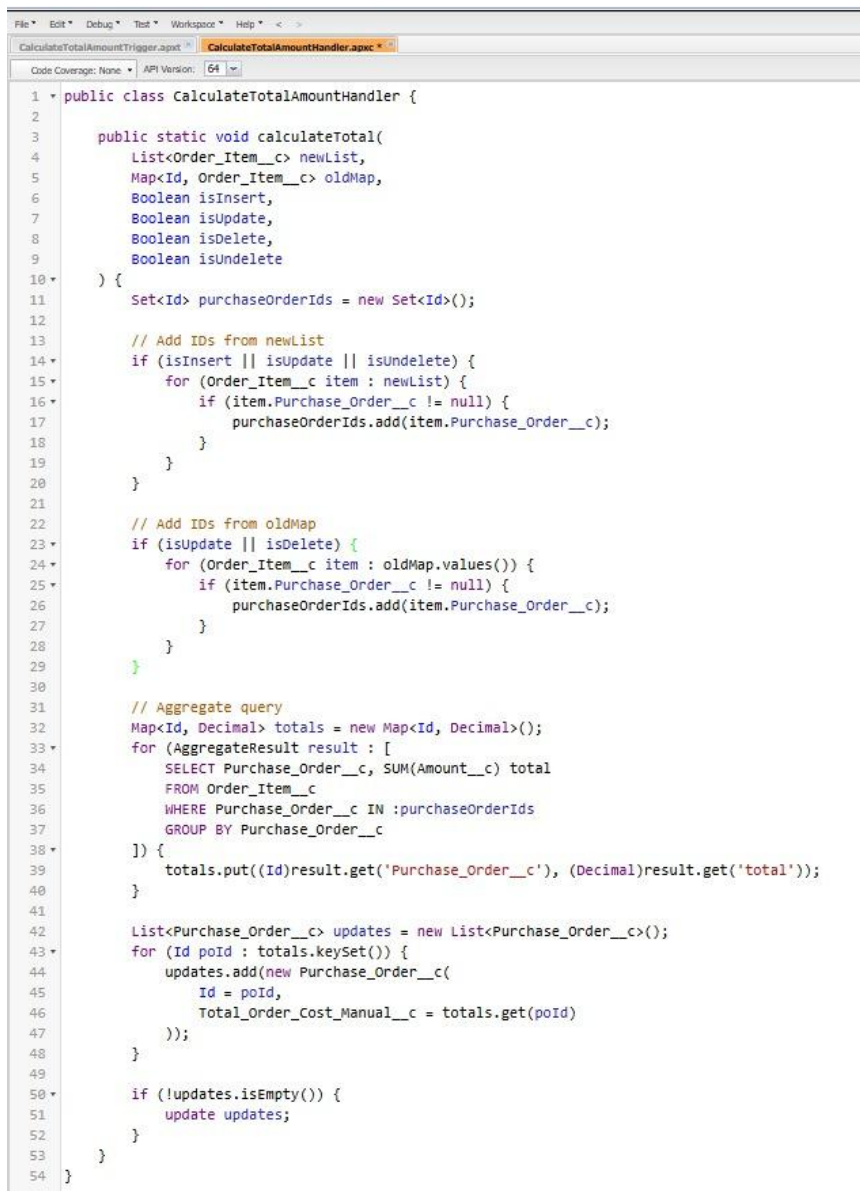
2.1 Apex trigger



The screenshot shows the Apex Trigger code in the Developer Console. The trigger is named `CalculateTotalAmountTrigger` and is triggered on the `Order_Item__c` object. It is configured to run after insert, after update, after delete, and after undelete. The trigger calls the `calculateTotal` method of the `CalculateTotalAmountHandler` class.

```
1 trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
2     CalculateTotalAmountHandler.calculateTotal(
3         Trigger.new,
4         Trigger.oldMap,
5         Trigger.isInsert,
6         Trigger.isUpdate,
7         Trigger.isDelete,
8         Trigger.isUndelete
9     );
10 }
```

2.2 Apex class



The screenshot shows the Apex Class code in the Developer Console. The class is named `CalculateTotalAmountHandler` and contains a static method `calculateTotal`. The method takes a list of `Order_Item__c` objects, a map of `Id` to `Order_Item__c` objects, and four boolean flags (`isInsert`, `isUpdate`, `isDelete`, `isUndelete`) as input. The method performs the following steps:

- Creates a `Set<Id>` named `purchaseOrderIds`.
- Adds IDs from `newList` to `purchaseOrderIds` if `isInsert`, `isUpdate`, or `isUndelete` is true.
- Adds IDs from `oldMap` to `purchaseOrderIds` if `isUpdate` or `isDelete` is true.
- Executes an aggregate query to calculate the total amount for each purchase order ID.
- Creates a list of `Purchase_Order__c` objects named `updates`.
- Updates the `Total_Order_Cost_Manual__c` field for each purchase order ID.
- Updates the `updates` list if it is not empty.

```
1 public class CalculateTotalAmountHandler {
2
3     public static void calculateTotal(
4         List<Order_Item__c> newList,
5         Map<Id, Order_Item__c> oldMap,
6         Boolean isInsert,
7         Boolean isUpdate,
8         Boolean isDelete,
9         Boolean isUndelete
10    ) {
11        Set<Id> purchaseOrderIds = new Set<Id>();
12
13        // Add IDs from newList
14        if (isInsert || isUpdate || isUndelete) {
15            for (Order_Item__c item : newList) {
16                if (item.Purchase_Order__c != null) {
17                    purchaseOrderIds.add(item.Purchase_Order__c);
18                }
19            }
20        }
21
22        // Add IDs from oldMap
23        if (isUpdate || isDelete) {
24            for (Order_Item__c item : oldMap.values()) {
25                if (item.Purchase_Order__c != null) {
26                    purchaseOrderIds.add(item.Purchase_Order__c);
27                }
28            }
29        }
30
31        // Aggregate query
32        Map<Id, Decimal> totals = new Map<Id, Decimal>();
33        for (AggregateResult result : [
34            SELECT Purchase_Order__c, SUM(Amount__c) total
35            FROM Order_Item__c
36            WHERE Purchase_Order__c IN :purchaseOrderIds
37            GROUP BY Purchase_Order__c
38        ]) {
39            totals.put((Id)result.get('Purchase_Order__c'), (Decimal)result.get('total'));
40        }
41
42        List<Purchase_Order__c> updates = new List<Purchase_Order__c>();
43        for (Id poId : totals.keySet()) {
44            updates.add(new Purchase_Order__c(
45                Id = poId,
46                Total_Order_Cost_Manual__c = totals.get(poId)
47            ));
48        }
49
50        if (!updates.isEmpty()) {
51            update updates;
52        }
53    }
54 }
```