

1. Object Configuration

1.1 Product Object : Contains product-related fields like ID, price, stock levels, etc.

Setup → Object Manager → Product → Fields & Relationships

The screenshot shows the Salesforce Object Manager interface for the 'Product' 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, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Product' and 'Fields & Relationships', showing 9 items sorted by Field Label. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Current Stock Level	Current_Stock_Level__c	Number(18, 0)		
Last Modified By	LastModifiedById	Lookup(User)		
Minimum Stock Level	Minimum_Stock_Level__c	Number(5, 0)		
Owner	OwnerId	Lookup(User,Group)		✓
Product Description	Product_Description__c	Text Area(255)		
Product ID	Name	Text(80)		✓
Product Name	Product__c	Text(255)		
Unit Price	Unit_Price__c	Currency(16, 2)		

1.2 Purchase Order Object : Stores order-related data like expected delivery, supplier, and total cost.

Setup → Object Manager → Purchase Order → Fields & Relationships

The screenshot shows the Salesforce Object Manager 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, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area is titled 'Purchase Order' and 'Fields & Relationships', showing 11 items sorted by Field Label. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Expected Delivery Date	Expected_Delivery_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Order Count	Order_Count__c	Roll-Up Summary (COUNT Order Item)		
Order Date	Order_Date__c	Date		
Owner	OwnerId	Lookup(User,Group)		✓
Purchase Order ID	Name	Text(80)		✓
Supplier ID	Supplier_ID__c	Lookup(Supplier)		✓
Total Order Cost	Total_Order_Cost__c	Roll-Up Summary (SUM Order Item)		
Total Order Cost Manual	Total_Order_Cost_Manual__c	Currency(16, 2)		

1.3 Order Item Object : Connects Products with Purchase Orders and tracks quantity, price, and amount.

Setup → Object Manager → Order Item → Fields & Relationships

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

User

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

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Item ID	Name	Text(80)	✓	
Product	Product__c	Lookup(Product)	✓	
Purchase Order	Purchase_Order__c	Master-Detail(Purchase Order)	✓	
Quantity Ordered	Quantity_Ordered__c	Number(7, 0)		
Quantity Received	Quantity_Received__c	Number(10, 0)		
Unit Price	Unit_Price__c	Formula (Currency)		

1.4 Inventory Transaction Object : Tracks inventory movements like receipts, issues, and adjustments.

Setup → Object Manager → Inventory Transaction → Fields & Relationships

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

User

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

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Inventory Transaction ID	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Purchase Order	Purchase_Order__c	Lookup(Purchase Order)		✓
Total Order Cost	Total_Order_Cost__c	Formula (Currency)		
Transaction Date	Transaction_Date__c	Date		
Transaction Type	Transaction_Type__c	Picklist		

1.5 Supplier Object : Contains supplier information such as contact person and address.

Setup → Object Manager → Supplier → Fields & Relationships

2. Apex Trigger and Class : Custom logic to automatically update the total order cost.

```
File • Edit • Debug • Test • Workspace • Help • < >
CalculateTotalAmountTrigger.apxt CalculateTotalAmountHandler.apxc
Code Coverage: None API Version: 64
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 }
```

2.1 Apex Trigger: CalculateTotalAmountTrigger

Trigger on Order_Item__c that executes after insert/update/delete.

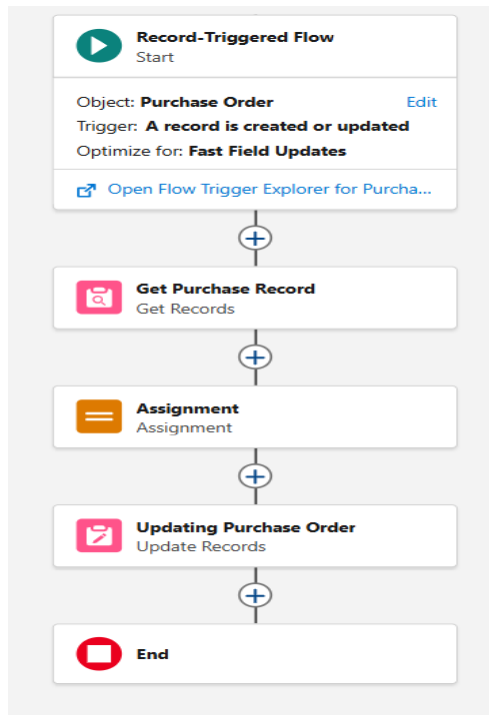
Developer Console → File → Open Trigger → Show Code

```
File • Edit • Debug • Test • Workspace • Help • < >
CalculateTotalAmountTrigger.apxt CalculateTotalAmountHandler.apxc
Code Coverage: None API Version: 64
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 }
```

3. Flow: Actual Delivery Date Calculation

A record-triggered flow that sets actual delivery date based on order date.

Setup → Flows → Actual Delivery Date Updating → Flow Overview



Assignment logic (Order Date + 3 days)

Assignment

* Label

Assignment

* API Name

Assignment

Description

Set Variable Values

Each variable is modified by the operator and value combination.

Variable

Operator

Value

ActualDeliveryDate

Equals

... Purchase_Order__c > Order Date

Variable

Operator

Value


ActualDeliveryDate

Add

3


+ Add Assignment

Update Records screen

 Update Records ×

* Label

Updating Purchase Order

* API Name 

Updating_Purchase_Order

Description


* 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



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

 Actual Delivery Date ×

←

Value

 ActualDeliveryDate ×

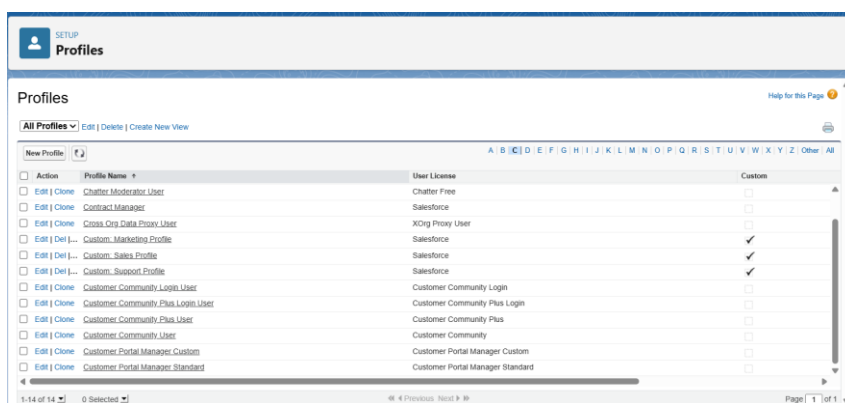


+ Add Field

4. Profiles and Permission Sets

4.1 Profiles : Two profiles were created Inventory Manager and Purchase Manager Permissions were set to control access to custom objects.

Setup → Profiles → Open Profile → Custom Object Permissions



The screenshot shows the Salesforce Setup page for Profiles. The 'Profiles' tab is selected. A table lists various profiles and their associated user licenses. The 'Custom' column has checkboxes for each profile, with some checked.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	Cross-Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Del ...	Custom_Marketing_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Del ...	Custom_Sales_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Del ...	Custom_Support_Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Clone	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/> Clone	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/> Clone	Customer Community Plus User	Customer Community Plus	<input type="checkbox"/>
<input type="checkbox"/> Clone	Customer Community User	Customer Community	<input type="checkbox"/>
<input type="checkbox"/> Clone	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
<input type="checkbox"/> Clone	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>

4.2 Permission Set: Purchase Manager Create Access

Grants create access to Order Items

1: Permission Set Details

Setup

Home

Object Manager

perm

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?

Try using Global Search.

SETUP

Permission Sets

On this page you can create, view, and manage permission sets.

All Permission Sets | Edit | Delete | Create New View

New

Action	Permission Set Name	Description	License
<input type="checkbox"/>	Clone	Agentforce Service Agent User	Agentforce Service Agent User
<input type="checkbox"/>	Clone	Authenticated Buyer	Salesforce Payments External
<input type="checkbox"/>	Clone	Buyer	R2B Buyer Permission Set One Seat
<input type="checkbox"/>	Clone	Buyer Manager	R2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	Clone	C360 High Scale Flow Integration User	Cloud Integration User
<input type="checkbox"/>	Clone	CRM User	CRM User
<input type="checkbox"/>	Clone	Code Builder User	Code Builder
<input type="checkbox"/>	Clone	Commerce Admin	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Clone	Commerce Session	Commerce Session Permission Set License Seats
<input type="checkbox"/>	Clone	ConnectivityServiceCASCPermSet	Cloud Integration User
<input type="checkbox"/>	Clone	Contact Center Admin	Service Cloud Voice User
<input type="checkbox"/>	Clone	Contact Center Admin (Partner Telephony)	Service Cloud Voice User (Partner Telephony)

1-25 of 85

0 Selected

4 Previous Next

Page 1 of 4

2: Object Settings for Order Item

Setup

Home

Object Manager

perm

Users

Permission Set Groups

Permission Sets

Custom Code

Custom Permissions

Didn't find what you're looking for?

Try using Global Search.

SETUP

Permission Sets

Permission Set Edit View

Save

Save As

Delete

Cancel

Step 1: Enter View Name

View Name: All Permission Set

Created By: OrgAdmin@FSC 8/9/2023 12:15 PM

Last Modified By: OrgAdmin@FSC 8/9/2023 12:15 PM

Step 2: Specify Filter Criteria

Setting: Operator: Value: Clear All Rows

Add Row

Examples: Modify All Data equals False, Contact: Modify All equals True

Step 3: Select Columns to Display

Specify the columns to show in the list view. To set the columns, you can add profile details, user permissions, and object-level permissions.

Search: All Find

Available Settings: Too many to display, refine search criteria

Selected Settings: Permission Set Name, Description, License

Add, Remove, Top, Bottom, Up, Down

Save

Save As

Delete

Cancel

3: Assigned Users

Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Data
Email

Setup Home
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Sales Cloud Everywhere
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Data
Email

5. Page Layouts : Custom layouts created to group fields into Product Details, Order Info, etc.

Object Manager → [Object] → Page Layouts → Edited Layouts

Setup Home
Salesforce Go
Service Setup Assistant
Commerce Setup Assistant
Field Service Setup Home (Beta)
Hyperforce Assistant
Release Updates
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
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Setup Home
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Hyperforce Assistant
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Email

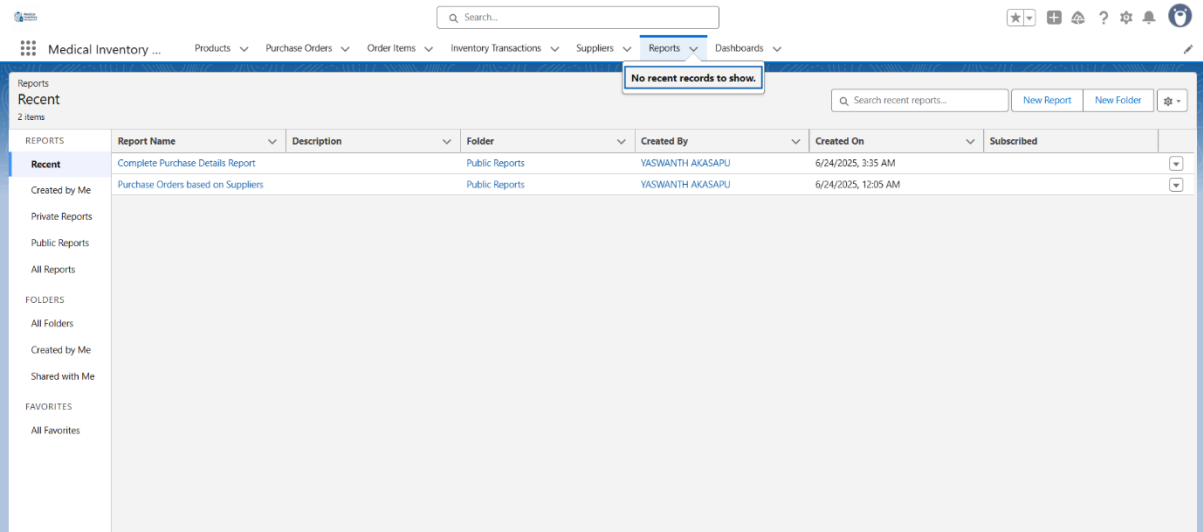
Setup Home
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Optimizer
Sales Cloud Everywhere
ADMINISTRATION
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User Management Settings
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6. Reports : Two reports were created to summarize and visualize data

Purchase Orders Based on Suppliers ,

Complete Purchase Details Report.

1: Report Filters and Grouping Fields:



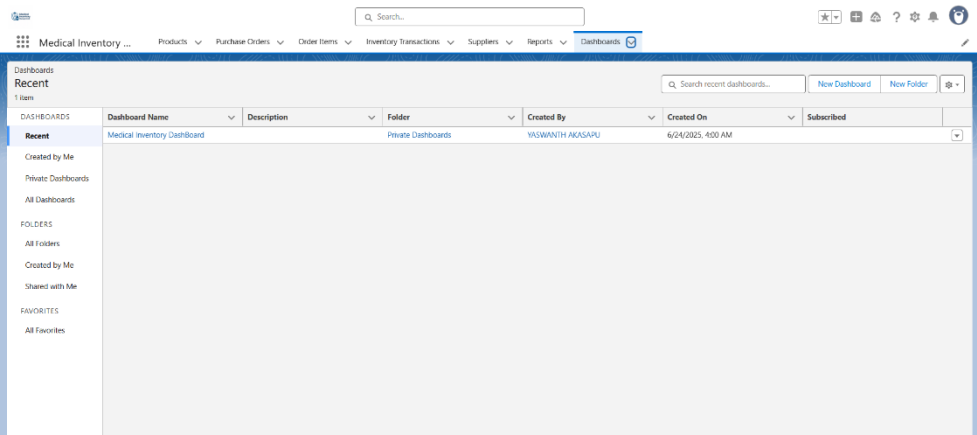
2: Run Report Output :



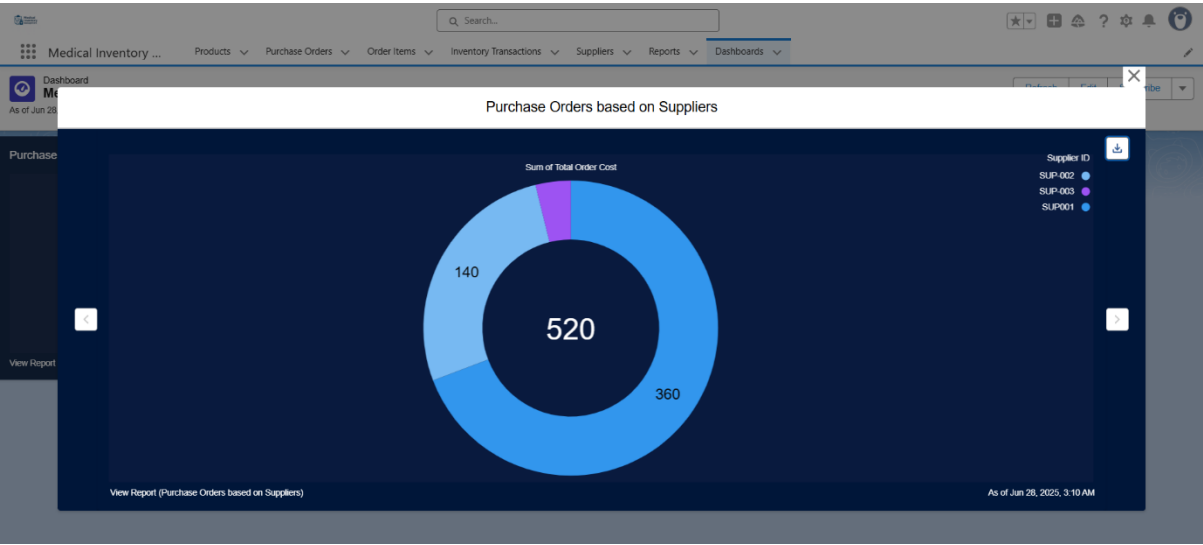
7. Dashboards :

Dashboard created to visually display summarized inventory data.

1: Dashboard Builder View



2: Donut Chart / Table based on Purchase Orders Report :



8. Sample Data Screens : Captured data entered for testing the flow and dashboard.

1: Product Record Screen :

The screenshot shows the "Products" screen with a table of 5 items. The table has columns for "Product ID" and "Product Name". The data is as follows:

Product ID	Product Name
P-002	
P-003	
P-004	
P001	
p101	

The screen includes a sidebar with "Products" and "All" options, and a top navigation bar with "Medical Inventory ...", "Products", "Purchase Orders", "Order Items", "Inventory Transactions", "Suppliers", "Reports", and "Dashboards".

2: Supplier Record Screen :

The screenshot shows the "Suppliers" screen with a table of 3 items. The table has columns for "Supplier ID" and "Supplier Name". The data is as follows:

Supplier ID	Supplier Name
SUP-002	
SUP-003	
SUP001	

The screen includes a sidebar with "Suppliers" and "Recently Viewed" options, and a top navigation bar with "Medical Inventory ...", "Products", "Purchase Orders", "Order Items", "Inventory Transactions", "Suppliers", "Reports", and "Dashboards".

3: Purchase Order Screen :

The screenshot shows the 'Purchase Orders' screen. The top navigation bar includes 'Medical Inventory ...', 'Products', 'Purchase Orders' (selected), 'Order Items', 'Inventory Transactions', 'Suppliers', 'Reports', and 'Dashboards'. A search bar is located at the top right. The main header area displays 'Purchase Orders' with a 'Recently Viewed' dropdown and a list icon. Below this, it states '5 items • Updated a few seconds ago'. The table lists the following items:

	<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	

On the right side, there are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A search bar for the list is also present.

4: Order Item Record :

The screenshot shows the 'Order Items' screen. The top navigation bar is the same as the previous screen, with 'Order Items' selected. The main header area displays 'Order Items' with a 'Recently Viewed' dropdown and a list icon. Below this, it states '9 items • Updated a few seconds ago'. The table lists the following items:

	<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	

On the right side, there are buttons for 'New', 'Import', and 'Assign Label'. A search bar for the list is also present.

5: Inventory Transaction Entry :

The screenshot shows the 'Inventory Transactions' screen. The top navigation bar is the same as the previous screens, with 'Inventory Transactions' selected. The main header area displays 'Inventory Transactions' with a 'Recently Viewed' dropdown and a list icon. Below this, it states '6 items • Updated a few seconds ago'. The table lists the following items:

	<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	

On the right side, there are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A search bar for the list is also present.

