

NAAN MUDHALVAN PROJECT REPORT

MEDICAL INVENTORY MANAGEMENT

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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.

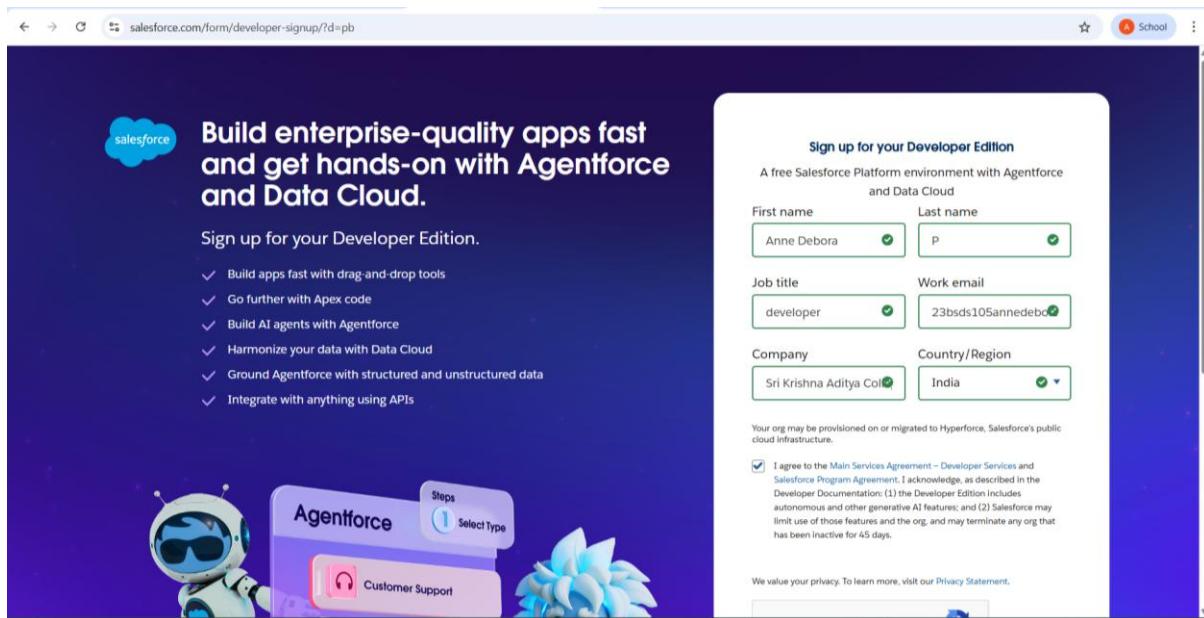
1.2 PURPOSE

The purpose of the **Medical Inventory Management System** project is to design and implement a real-time Salesforce application that streamlines the end-to-end management of medical inventory by maintaining accurate supplier records, tracking purchase orders, monitoring product stock levels and expiry dates, and enabling efficient reporting and analysis.

DEVELOPMENT PHASE

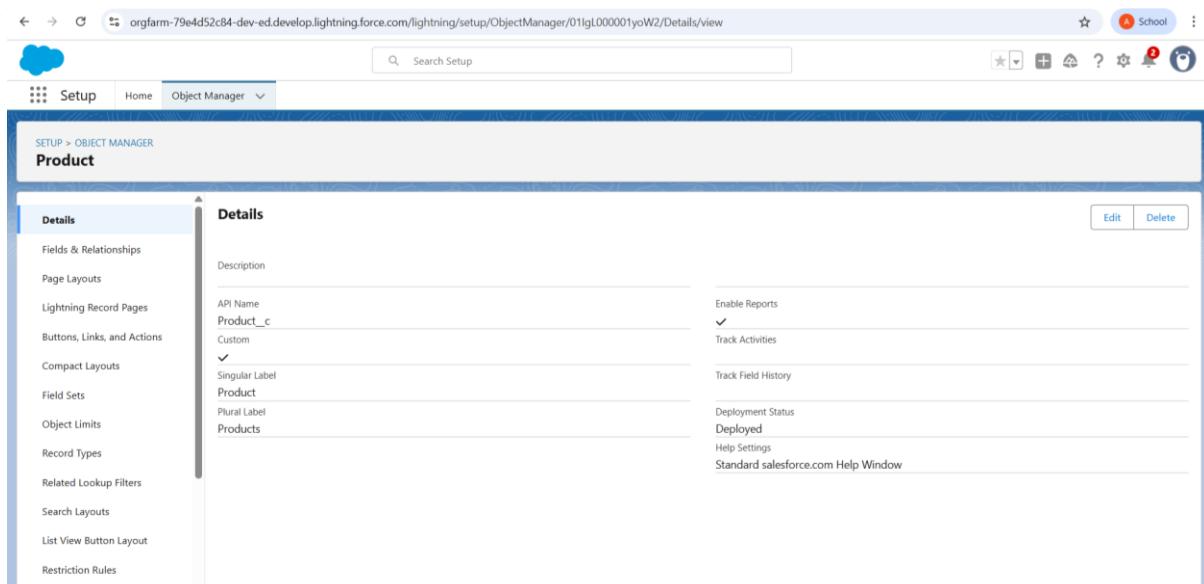
Creating a developer account

By using this url: <https://developer.salesforce.com/signup>



Created Objects

Products



Purchase Order

The screenshot shows the Salesforce Object Manager interface for the 'Purchase Order' object. The left sidebar lists various setup options like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main 'Details' tab displays the following configuration:

Field	Value
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

Buttons at the top right include 'Edit' and 'Delete'.

Order Item

The screenshot shows the Salesforce Object Manager interface for the 'Order Item' object. The left sidebar lists various setup options. The main 'Details' tab displays the following configuration:

Field	Value
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

Buttons at the top right include 'Edit' and 'Delete'.

Inventory Transaction

The screenshot shows the Salesforce Setup interface for the Object Manager. The URL is orgfarm-79e4d52c84-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IgL000001yuTN/Details/view. The page title is "SETUP > OBJECT MANAGER Inventory Transaction". The left sidebar lists various configuration options: 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, and Scoping Rules. The main "Details" section shows the following fields:

Field	Value
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

Buttons at the top right of the details section are "Edit" and "Delete".

Supplier

The screenshot shows the Salesforce Setup interface for the Object Manager. The URL is orgfarm-79e4d52c84-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IgL000001yuYD/Details/view. The page title is "SETUP > OBJECT MANAGER Supplier". The left sidebar lists various configuration options: 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, and Scoping Rules. The main "Details" section shows the following fields:

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

Buttons at the top right of the details section are "Edit" and "Delete".

Custom Tabs

Product, Purchase Order, Order Item, Inventory Transaction, Supplier.

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. On the left, there's a sidebar with 'Feature Settings' (Analytics, Tableau, User Interface), 'Console Settings' (Loaded Console Tab Limit, Rename Tabs and Labels), and 'Tabs'. A note says 'Didn't find what you're looking for? Try using Global Search.' The main area is titled 'Custom Tabs' and contains three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section lists five tabs with icons and labels: 'Inventory Transactions' (blue bottle icon), 'Order Items' (red bell icon), 'Products' (red bell icon), 'Purchase Orders' (red bell icon), and 'Suppliers' (blue bottle icon). Each tab has 'Edit | Del' links and a 'Tab Style' column.

Lightning App for Medical Inventory Management

Name: Medical Inventory Management.

Add Navigation Items: Product, Supplier, Purchase Order, Order Item, Inventory Transaction, Reports, Dashboards.

The screenshot shows the Lightning App Builder interface. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Medical Inventory Management'. The left sidebar has 'App Settings' selected, with 'App Details & Branding' highlighted. Under 'App Details & Branding', there are sections for 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and says 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It includes fields for 'App Name' (Medical Inventory Management), 'Developer Name' (Medical_Inventory_Management), 'Description' (Medical Inventory Management), 'Image' (with an 'Upload' button), and 'Primary Color Hex Value' (#0070D2). Below this is 'Org Theme Options' with a checkbox for 'Use the app's image and color instead of the org's custom theme'. At the bottom is an 'App Launcher Preview' showing a blue square with 'MI' and the text 'Medical Inventory Manage...'.

Lightning App Builder App Settings

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Selected Items

Icon	Name
Home	Home
Products	Products
Purchase Orders	Purchase Orders
Order Items	Order Items
Inventory Transactions	Inventory Transactions
Suppliers	Suppliers
Reports	Reports
Dashboards	Dashboards

User Profiles

Lightning App Builder App Settings

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Selected Profiles

Profile Name
System Administrator
Inventory Manager
Purchase Manager

User Profiles

Fields and relationships

Product

The screenshot shows the Salesforce Object Manager interface for the 'Product' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' and displays 10 items sorted by Field Label. Each row shows a field name, its API name, and its type. For example, 'Created By' is a Lookup(User) field, and 'Unit Price' is a Currency(16, 2) field.

Field Label	API Name	Type
Created By	CreatedBy	Lookup(User)
Current Stock Level	Current_Stock_Level__c	Number(18, 0)
Expiry Date	Expiry_Date__c	Date
Last Modified By	LastModifiedBy	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)

Purchase Order

The screenshot shows the Salesforce Object Manager interface for the 'Purchase Order' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' and displays 11 items sorted by Field Label. Each row shows a field name, its API name, and its type. For example, 'Created By' is a Lookup(User) field, and 'Total Order Cost' is a Currency(16, 2) field.

Field Label	API Name	Type
Created By	CreatedBy	Lookup(User)
Expected Delivery Date	Expected_Delivery_Date__c	Date
Last Modified By	LastModifiedBy	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	Purchase_Order_ID__c	Text(18)
Purchase Order Name	Name	Text(80)
Supplier ID	Supplier_ID__c	Lookup(Supplier)
Total Order Cost	Total_Order_Cost__c	Currency(16, 2)

Order Item

The screenshot shows the 'Fields & Relationships' section for the 'Order Item' object in the Salesforce Object Manager. The sidebar on the left lists various setup options like Details, Page Layouts, Lightning Record Pages, etc. The main area displays 12 items sorted by Field Label, with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Item	Order_Item__c	Lookup(Order Item)		✓
Order Item ID	Order_Item_ID_c	Text(18)		
Order Item Name	Name	Text(80)		✓
Product ID	Product_ID_c	Lookup(Product)		✓
Purchase Order	Purchase_Order__c	Master-Detail(Purchase Order)		✓
Purchase Order ID	Purchase_Order_ID_c	Master-Detail(Product)		✓
Quantity Ordered	Quantity_Ordered_c	Number(18, 0)		

Inventory Transaction

The screenshot shows the 'Fields & Relationships' section for the 'Inventory Transaction' object in the Salesforce Object Manager. The sidebar on the left lists various setup options like Details, Page Layouts, Lightning Record Pages, etc. The main area displays 9 items sorted by Field Label, with columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Inventory Transaction Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Purchase Order ID	Purchase_Order_ID_c	Lookup(Purchase Order)		✓
Total Order Cost	Total_Order_Cost_c	Formula (Currency)		
Transaction Date	Transaction_Date_c	Date		
Transaction ID	Transaction_ID_c	Text(18)		
Transaction Type	Transaction_Type_c	Picklist		

Supplier

The screenshot shows the Salesforce Object Manager interface for the 'Supplier' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'Fields & Relationships' and displays a table of fields. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are Address, Contact Person, Created By, Email, Last Modified By, Owner, Phone Number, Supplier ID, and Supplier Name.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Contact Person	Contact_Person__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
Supplier ID	Supplier_ID__c	Text(18)		
Supplier Name	Name	Text(80)		✓

Editing of Page Layouts

Product layout

The screenshot shows the Salesforce Object Manager interface for the 'Product' object. The left sidebar lists various setup categories. The main content area is titled 'Page Layouts' and shows a configuration screen for a specific page layout. It includes sections for 'Fields' (Buttons, Quick Actions, Mobile & Lightning Actions, etc.), 'Layout Properties' (Quick Find, Field Name), and a preview of the 'Product Detail' section. The preview shows fields like Product ID, Product Name, Expiry Date, Unit Price, Current Stock Level, Minimum Stock Level, and Owner.

Purchase Order Layout

The screenshot shows the 'Purchase Order' object in the Salesforce Object Manager. The 'Page Layouts' tab is selected. A modal window titled 'Layout Properties' is open, showing the 'Fields' section. It lists fields such as 'Expected Delivery Date', 'Owner', 'Total Order Cost', 'Last Modified By', 'Purchase Order ID', 'Order Count', 'Purchase Order Name', 'Actual Delivery Date', 'Order Date', and 'Supplier ID'. Below the modal, the 'Purchase Order Detail' section is visible, containing sections for 'Information', 'System Information', and 'Custom Links'. Standard buttons like Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels are at the bottom.

Order Item Layout

The screenshot shows the 'Order Item' object in the Salesforce Object Manager. The 'Page Layouts' tab is selected. A modal window titled 'Layout Properties' is open, showing the 'Fields' section. It lists fields such as 'Last Modified By', 'Product ID', 'Quantity Received', 'Order Item ID', 'Purchase Order', 'Unit Price', 'Amount', 'Order Item ID', 'Purchase Order ID', 'Order Item Name', and 'Quantity Ordered'. Below the modal, the 'Order Item Detail' section is visible, containing sections for 'Information', 'product details', 'System Information', and 'Custom Links'. Standard buttons like Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Edit Labels, and Custom Buttons are at the bottom.

Inventory Transaction Layout

The screenshot shows the Salesforce Setup interface for configuring the 'Inventory Transaction' layout. The left sidebar lists various layout categories like Details, Fields & Relationships, and Page Layouts, with 'Page Layouts' currently selected. The main area displays the layout configuration for 'Inventory Transaction'. It includes a 'Fields' section with a quick find bar and a list of fields: Section, Blank Space, Created By, Purchase Order ID, Inventory Transac..., Last Modified By, Owner, Transaction ID, Transaction Type, and Total Order Cost. Below this is the 'Inventory Transaction Detail' section, which contains standard buttons for Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels. The detail section is divided into sections for Information, System Information, and Custom Links, each containing sample text entries.

Supplier Layout

The screenshot shows the Salesforce Setup interface for configuring the 'Supplier' layout. Similar to the previous layout, it's under the 'Page Layouts' category in the sidebar. The main area shows the 'Supplier Detail' layout configuration. The 'Fields' section lists fields: Section, Blank Space, Contact Person, Created By, Email, Last Modified By, Phone Number, Supplier ID, and Supplier Name. The 'Supplier Detail' section includes standard buttons for Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Sharing, Sharing Hierarchy, and Edit Labels. Like the inventory transaction layout, it has sections for Information, System Information, and Custom Links, with sample text entries.

Compact Layouts

Product Compact Layout

The screenshot shows the 'Object Manager' section for the 'Product' object. On the left, a sidebar lists various configuration options under 'Compact Layouts'. The main area displays the 'Product Compact Layout' detail page. Key details shown include:

- Label:** Product Compact Layout
- API Name:** Product_Compact_Layout
- Included Fields:** Product Name, Unit Price, Current Stock Level
- Created By:** Anne Debora P 9/13/2025, 4:13 AM
- Modified By:** Anne Debora P 9/15/2025, 10:48 PM

Product Order Compact Layout

The screenshot shows the 'Object Manager' section for the 'Purchase Order' object. On the left, a sidebar lists various configuration options under 'Compact Layouts'. The main area displays the 'Purchase Order Compact Layout' detail page. Key details shown include:

- Label:** Purchase Order Compact Layout
- API Name:** Purchase_Order_Compact_Layout
- Included Fields:** Purchase Order ID, Order Date, Total Order Cost, Supplier ID
- Created By:** Anne Debora P 9/13/2025, 4:15 AM
- Modified By:** Anne Debora P 9/15/2025, 10:49 PM

Validation Rules

Purchase Order Delivery Date Validation

SETUP > OBJECT MANAGER
Purchase Order

Purchase Order Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Rule Name: **Expected_Delivery_Date_Validation** Save Save & New Cancel

Active:

Description:

Error Condition Formula

Example: `Discount_Percent__c < 0.30` [More Examples...](#)

If this formula expression is true, display the text defined in the Error Message area

`(Expected_Delivery_Date__c - Order_Date__c) > 7`

Functions: [All Function Categories](#)

ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign

[Help on this function](#)

Error Message

Example: `Discount percent cannot exceed 30%`

This message will appear when Error Condition formula is true

Error Message: `The Expected Delivery Date should not exceed 7 days.`

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field [\[\]](#)

Save Save & New Cancel

Profiles

Inventory Manager → Access to Product & Inventory.
Purchase Manager → Access to Suppliers & Orders.

Profile Edit
Standard User

Set the permissions and page layouts for this profile.

Profile Edit

Name: Standard User
User License: Salesforce

Save Save & New Cancel

Custom Profile

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard_AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard_MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard_Insights)	<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_LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard_Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard_Sales)	<input type="checkbox"/>	<input checked="" type="radio"/>
Automation (standard_FlowsApp)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Cloud Mobile (standard_SalesCloudMobile)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard_LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard_LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard_Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard_Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Content (standard_Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard_LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Data Cloud (standard_Audience360)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard_ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>

Custom Object Permissions

	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 type="checkbox"/>													
Order Items	<input type="checkbox"/>													
Order Items	<input type="checkbox"/>													
Order Items	<input 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:	90 days <input type="button" value="Help"/>
Enforce password history:	3 passwords remembered <input type="button" value="Help"/>
Minimum password length:	8 <input type="button" value="Help"/>
Password complexity requirement:	Must include alpha and numeric characters <input type="button" value="Help"/>
Password question requirement:	Cannot contain password <input type="button" value="Help"/>
Maximum invalid login attempts:	10 <input type="button" value="Help"/>
Lockout effective period:	15 minutes <input type="button" value="Help"/>
Obfuscate secret answer for password resets:	<input type="checkbox"/>
Require a minimum 1 day password:	<input type="checkbox"/>

Roles And Users

Purchasing and Inventory Manager Roles

User Edit

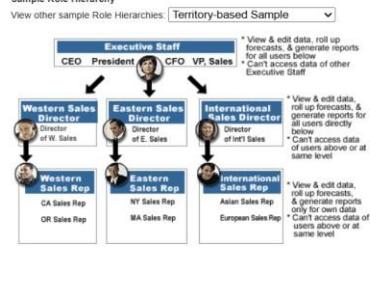
General Information

First Name: Ram
Last Name: Krishna
Alias: kg
Email: 230sd15bsuyabharathip@gmail.com
Username: 230sd15bsuyabharathip
Nickname: User175765072147589923
Title: Data.com
Company: Data.com
Department: Data.com
Division: Data.com
Data.com User Type: None
Data.com Monthly Addition Limit: 300
Accessibility Mode (Classic Only):
High-Contrast Palette on Charts:
Load Lightning Pages While Scrolling:
Debug Mode:

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy



Role Edit

Purchasing Manager

Label: Purchasing Manager
Role Name: Purchasing_Manager
This role reports to: SVP, Sales & Marketing
Role Name as displayed on reports: Purchasing Manager

Role Edit

Inventory Manager

Label: Inventory Manager
Role Name: Inventory_Manager
This role reports to: SVP, Sales & Marketing
Role Name as displayed on reports: Inventory Manager

John → Role: Purchase Manager, Profile: Purchase Manager.

Ram → Role: Inventory Manager, Profile: Inventory Manager.

The image displays three separate screenshots of the Salesforce User Edit page, each showing a different user's profile. The top screenshot shows 'John PurchaseM' with a role of 'Purchasing Manager' and a profile of 'Purchase Manager'. The middle screenshot shows 'Ram Krishna' with a role of 'Inventory Manager' and a profile of 'Inventory Manager'. The bottom screenshot shows another instance of 'John PurchaseM' with the same roles and profiles as the first. Each screenshot includes a sidebar with navigation links like Setup, Home, Object Manager, and various user management settings.

User Edit: John PurchaseM

User Edit: Ram Krishna

User Detail: John PurchaseM

Name	John PurchaseM	Role	Purchasing Manager
Alias	jpuch	User License	Salesforce
Email	23b5ds158suybharathip@skacas.ac.in [Verify]	Profile	Purchase Manager
Username	rtd@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User1757950511534814654	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None-
		Data.com Monthly Addition Limit	300
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
User Provisioning Accounts			

Permission Sets

Permission Set
Purchase Manager Create Access 1

Video Tutorial | Help for this Page ⓘ

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

Permission Set Overview > Object Settings Order Items

Order Items Edit

Tab Settings

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

Object Permissions

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input checked="" type="checkbox"/>
Edit	<input type="checkbox"/>
Delete	<input type="checkbox"/>
View All Records	<input type="checkbox"/>
Modify All Records	<input type="checkbox"/>
View All Fields	<input type="checkbox"/>

All Users ▾

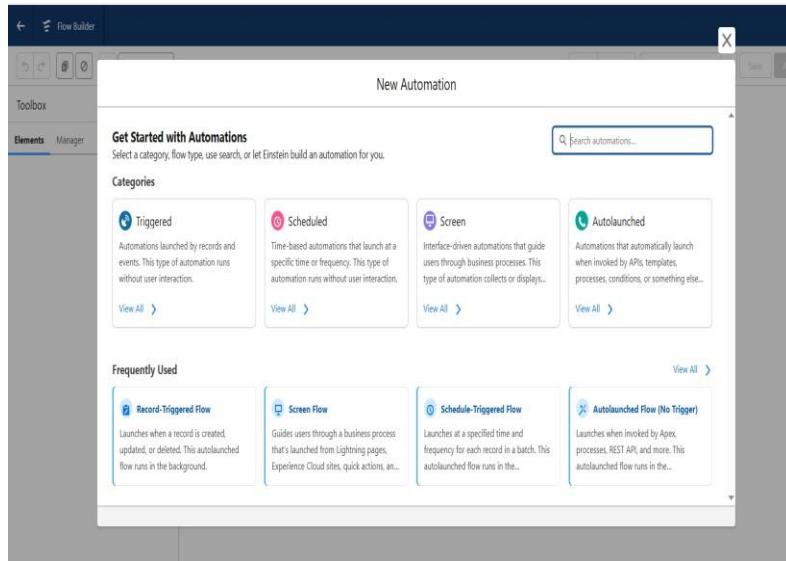
7 items • Sorted by Full Name • Filtered by All users • Updated a few seconds ago

Full Name ↑	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty@00dg00000biuj3uap.heckpoyhqvq1@chatter.salesforce.com	<input checked="" type="checkbox"/>	Purchasing...	Chatter Free User
Integration User	integ	integration@00dg00000biuj3uap.com	<input checked="" type="checkbox"/>	Purchasing...	Analytics Cloud Integration User
John PurchaseM	jpuuch	rfd@gmail.com	<input checked="" type="checkbox"/>	Purchasing...	Purchase Manager
OrgFarm EPIC	OEPIC	epic.e5d59cccd38d1@orgfarm.salesforce.com	<input checked="" type="checkbox"/>	Purchasing...	System Administrator
Ram Krishna	r kri	23bsds158suyabharathi@skacas.ac.in	<input checked="" type="checkbox"/>	Inventory ...	Inventory Manager
Security User	sec	insightssecurity@00dg00000biuj3uap.com	<input checked="" type="checkbox"/>	Purchasing...	Analytics Cloud Security User
Suyabharathi P	23b	23bsds158suyabharathip969@agentforce.com	<input checked="" type="checkbox"/>	Purchasing...	System Administrator

Current Assignments

Full Name ↑	Active	Role	Profile	User License	Expires On
Suyabharathi P	<input checked="" type="checkbox"/>		System Administrator	Salesforce	

Flows



Actual Delivery Date Updating - V1

Last saved on 9/13/2023, 08:20 PM **Active** Run Debug View Info Save As New Version Table Unsubscribe

Assignment

Record-Triggered Flow

Object: Purchase Order
Trigger: A record is created or updated
Optimize for: Fast Field Updates

Get Purchase Record

Assignment

Updating Purchasing Order

Get Records

Set Variable Values

Update Records

Record-Triggered Flow

Object: Purchase Order
Trigger: A record is created or updated
Optimize for: Fast Field Updates

Get Purchase Record

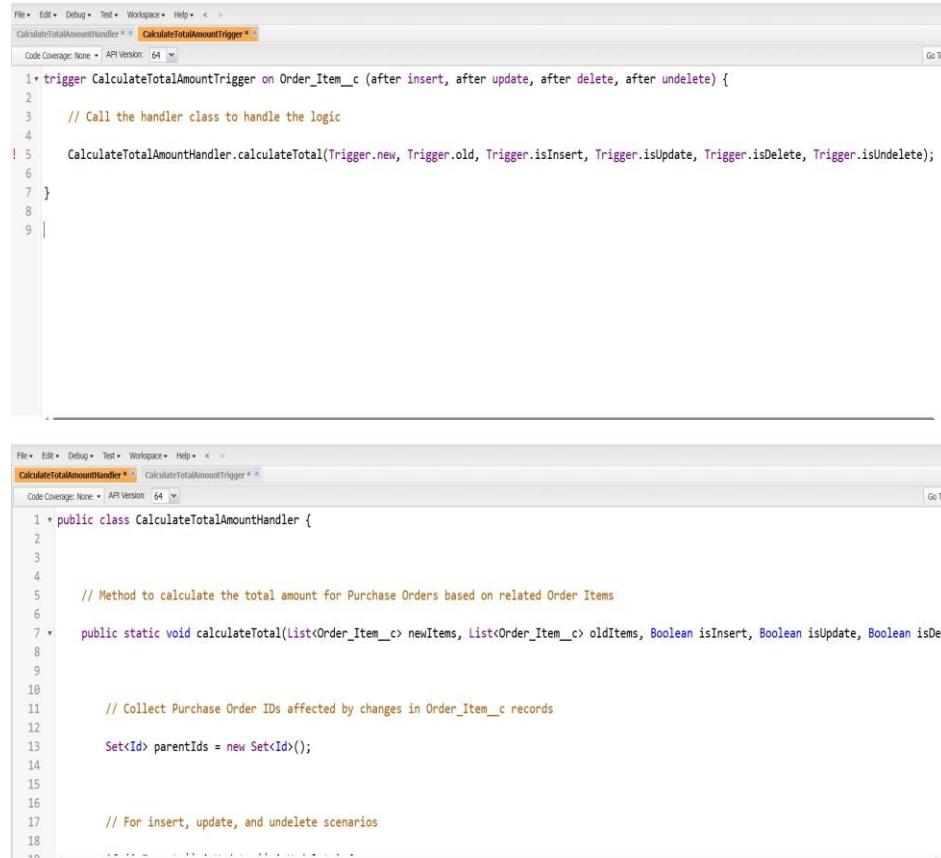
Assignment

Updating Purchasing Order

End

Triggers

Trigger to calculate Total Order Cost from related Order Items and update Purchase Order.



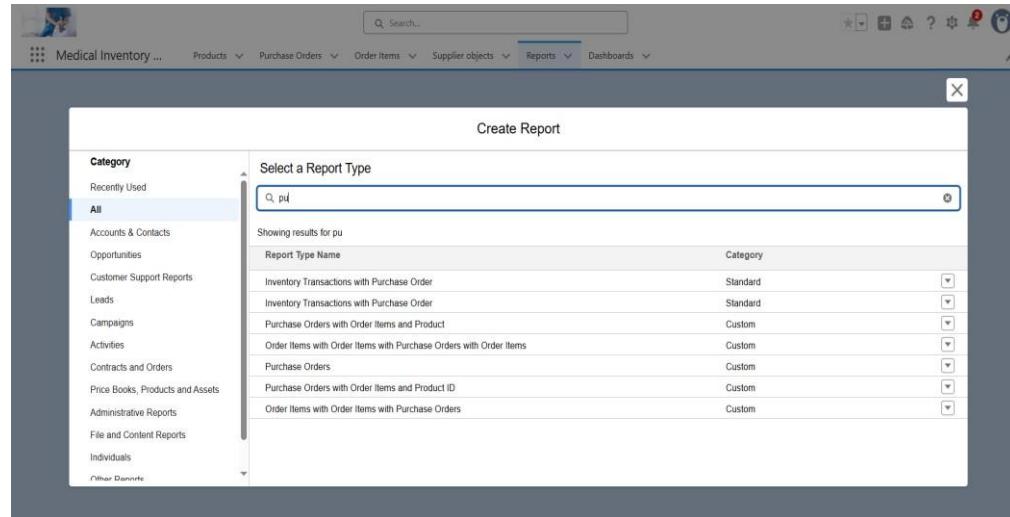
The image shows two side-by-side code editors in a Salesforce development environment. The top editor displays a trigger named 'CalculateTotalAmountTrigger' for the 'Order_Item__c' object. The trigger logic calls a static method 'calculateTotal' from a class named 'CalculateTotalAmountHandler'. The bottom editor shows the implementation of this handler class, which contains a static method 'calculateTotal' that takes lists of new and old order items and boolean parameters for insert, update, and delete operations. It also includes logic to collect purchase order IDs affected by changes in the order item records.

```
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);
}

public class CalculateTotalAmountHandler {
    public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean isDelete, Boolean isUndelete) {
        // Method to calculate the total amount for Purchase Orders based on related Order Items
        // Collect Purchase Order IDs affected by changes in Order_Item__c records
        Set<Id> parentIds = new Set<Id>();
        // For insert, update, and undelete scenarios
    }
}
```

Reports

Purchase Orders by Supplier Report – Group by Supplier ID, show Total Order Cost.



The image shows the 'Create Report' dialog in the Salesforce Reports interface. On the left, there is a sidebar with a 'Category' section containing a list of report types such as Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets, Administrative Reports, File and Content Reports, and Individuals. The 'All' category is currently selected. On the right, a search bar is used to find a report type, with the term 'pu' entered. A list of results is displayed, including 'Inventory Transactions with Purchase Order', 'Purchase Orders with Order Items and Product', 'Purchase Orders with Order Items and Product ID', and 'Order Items with Order Items with Purchase Orders'.

The screenshot shows a software application window with a search results grid on the left and a modal dialog on the right.

Search Results Grid:

- Header: Order Details
- Columns: Order ID, Order Date, Supplier Name, Product Name, Quantity, Unit Price, Total Cost
- Data rows (approximate values):
 - Order ID: 101, Order Date: 2023-09-01, Supplier Name: ABC Corp, Product Name: Widget A, Quantity: 100, Unit Price: \$100, Total Cost: \$10,000
 - Order ID: 102, Order Date: 2023-09-02, Supplier Name: XYZ Inc., Product Name: Widget B, Quantity: 200, Unit Price: \$150, Total Cost: \$30,000
 - Order ID: 103, Order Date: 2023-09-03, Supplier Name: DEF Ltd, Product Name: Widget C, Quantity: 150, Unit Price: \$200, Total Cost: \$30,000
 - Order ID: 104, Order Date: 2023-09-04, Supplier Name: GHI Corp, Product Name: Widget D, Quantity: 250, Unit Price: \$120, Total Cost: \$30,000
 - Order ID: 105, Order Date: 2023-09-05, Supplier Name: JKL Corp, Product Name: Widget E, Quantity: 300, Unit Price: \$180, Total Cost: \$54,000

Modal Dialog (Title: Order Details):

- Fields: Order ID, Order Date, Supplier Name, Product Name, Quantity, Unit Price, Total Cost
- Buttons: Save, Cancel, Delete

Complete Purchase Details Report – Show Supplier, Purchase Order, Products, Quantity, Amount.

The screenshot displays two reports from a software application.

Report: Purchase Orders based on Suppliers

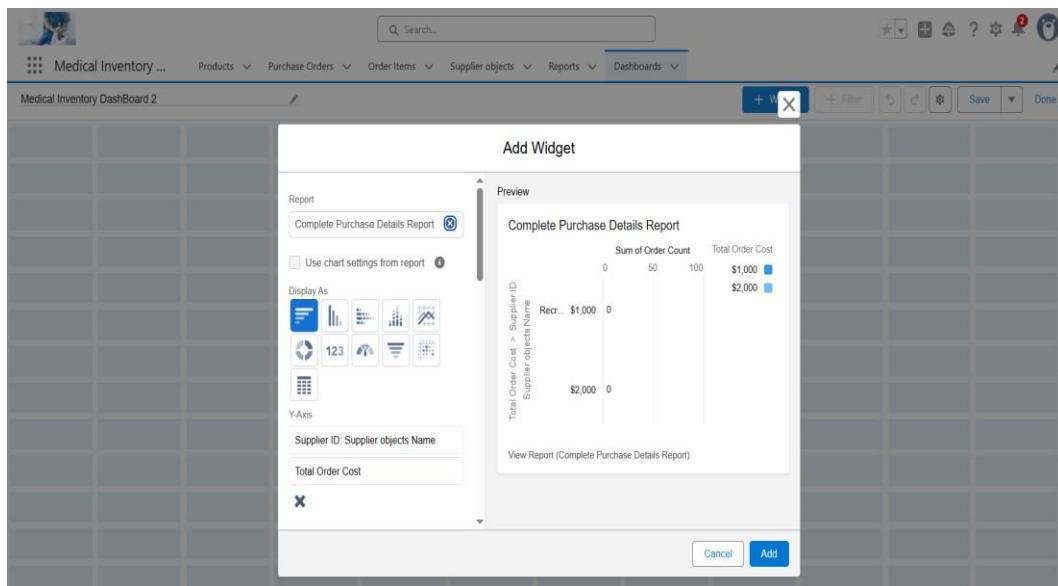
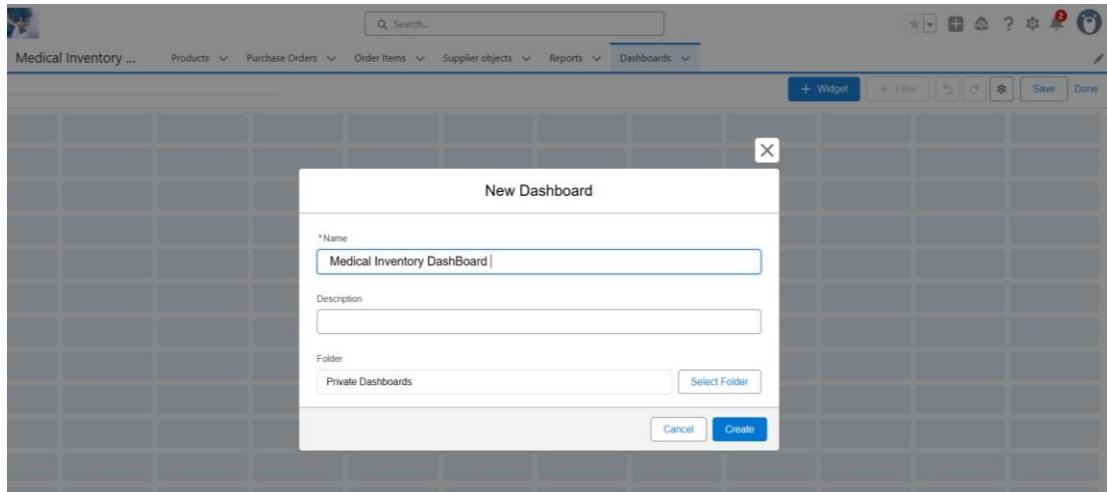
Total Records	Total Total Order Cost	Total Order Count																																										
6	\$10,000	0																																										
<input type="checkbox"/> Supplier ID: Supplier objects Name	<input type="checkbox"/> Purchase Order ID	<input type="checkbox"/> Purchase Order Name	<input type="checkbox"/> Total Order Cost	<input type="checkbox"/> Order Count																																								
<table border="1"> <thead> <tr> <th>Supplier ID</th> <th>Purchase Order ID</th> <th>Purchase Order Name</th> <th>Total Order Cost</th> <th>Order Count</th> </tr> </thead> <tbody> <tr> <td>Recruiter (6)</td> <td>a01g.00000NbK (1)</td> <td>Initial Review</td> <td>\$2,000</td> <td>0</td> </tr> <tr> <td></td> <td>a01g.00000NmPGc (1)</td> <td>Initial Review</td> <td>\$1,000</td> <td>0</td> </tr> <tr> <td></td> <td>a01g.00000NmRWv (1)</td> <td>Recruiter</td> <td>\$1,000</td> <td>0</td> </tr> <tr> <td></td> <td>a01g.00000NmWzZ (1)</td> <td>Recruiter</td> <td>\$2,000</td> <td>0</td> </tr> <tr> <td></td> <td>a01g.00000NmXMD (1)</td> <td>Recruiter</td> <td>\$2,000</td> <td>0</td> </tr> <tr> <td></td> <td>a01g.00000NmmsQ (1)</td> <td>Recruiter</td> <td>\$2,000</td> <td>0</td> </tr> <tr> <td>Total (6)</td> <td></td> <td></td> <td>\$10,000</td> <td>0</td> </tr> </tbody> </table>					Supplier ID	Purchase Order ID	Purchase Order Name	Total Order Cost	Order Count	Recruiter (6)	a01g.00000NbK (1)	Initial Review	\$2,000	0		a01g.00000NmPGc (1)	Initial Review	\$1,000	0		a01g.00000NmRWv (1)	Recruiter	\$1,000	0		a01g.00000NmWzZ (1)	Recruiter	\$2,000	0		a01g.00000NmXMD (1)	Recruiter	\$2,000	0		a01g.00000NmmsQ (1)	Recruiter	\$2,000	0	Total (6)			\$10,000	0
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	a01g.00000NmmsQ (1)	Recruiter	\$2,000	0																																								
Total (6)			\$10,000	0																																								

Report: Purchase Orders with Order Items and Product

Total Records	6						
<input type="checkbox"/> Supplier ID: Supplier objects Name	<input type="checkbox"/> Total Order Cost	<input type="checkbox"/> Purchase Order ID	<input type="checkbox"/> Purchase Order Name	<input type="checkbox"/> Product ID	<input type="checkbox"/> Expected Delivery Date	<input type="checkbox"/> Row Counts	
<input type="checkbox"/> Recruiter (6)							
\$1,000 (2)	a01g.00000NmPGc (1)	-	Initial Review	-	9/24/2025		
	Subtotal						
	a01g.00000NmRWv (1)	-	Recruiter		9/14/2025		
	Subtotal						
\$2,000 (4)	a01g.00000NbK (1)	-	Initial Review		9/23/2025		
	Subtotal						
	a01g.00000NmWzZ (1)	-	Recruiter		10/1/2025		
	Subtotal						
	a01g.00000NmXMD (1)	-	Recruiter		9/20/2025		
	Subtotal						
	a01g.00000NmmsQ (1)	-	Recruiter		9/13/2025		
	Subtotal						
Subtotal							
Row Counts	<input checked="" type="checkbox"/>	Detail Rows	<input checked="" type="checkbox"/>	Subtotals	<input checked="" type="checkbox"/>	Grand Total	<input checked="" type="checkbox"/>

Dashboards

Medical Inventory Dashboard



Medical Inventory ... Products Purchase Orders Order Items Supplier objects Reports Dashboards

Dashboard Medical Inventory DashBoard As of Sep 16, 2025, 7:37 AM Viewing as Suyabharathi P

Complete Purchase Details Report

View Report (Complete Purchase Details ...) As of Sep 16, 2025, 7:37 AM

Complete Purchase Details Report

Supplier ID: Supplier objects Name > Purchase Order ID

Purchase Order ID	Supplier ID: Supplier objects Name
a01gL00000Nbtk	a01gL...
a01gL00000NmPGc	a01gL...
a01gL00000NmRWw	a01gL...
a01gL00000NmXMD	a01gL...
a01gL00000NmnsQ	a01gL...

Sum of Order Count Recruiter

View Report (Complete Purchase Details ...) As of Sep 16, 2025, 7:37 AM

Complete Purchase Details Report

Supplier ID: Supplier objects Name > Purchase Order ID

Record Count	Purchase Order ID
1	a01gL00000Nbtk
1	a01gL00000NmPGc
1	a01gL00000NmRWw
1	a01gL00000NmXMD
1	a01gL00000NmnsQ

View Report (Complete Purchase Details ...) As of Sep 16, 2025, 7:37 AM

Medical Inventory ... Products Purchase Orders Order Items Supplier objects Reports Dashboards

Purchase Orders based on Suppliers

Purchase Order ID > Supplier ID: Supplier objects Name

View Report (Purchase Orders based on ...) As of Sep 13, 2025, 9:37 AM

Complete Purchase Details Report

View Report (Complete Purchase Details ...) As of Sep 13, 2025, 9:37 AM

Purchase Orders based on Suppliers

Supplier ID: Supplier objects Name > Purchase Order ID

Supplier ID: Supplier objects Name	Purchase Order ID
Recruiter	a01gL00000Nbtk
a01gL...	a01gL00000NmPGc
a01gL...	a01gL00000NmRWw
a01gL...	a01gL00000NmXMD
a01gL...	a01gL00000NmnsQ

Sum of Total Order Cost

View Report (Purchase Orders based on ...) As of Sep 13, 2025, 9:37 AM

Purchase Orders based on Suppliers

Supplier ID: Supplier objects Name > Purchase Order ID

Supplier ID: Supplier objects Name	Purchase Order ID
Recruiter	-0aa
	PO-001
	PO-002
	PO-003
	PO-005

Sum of Order Count Recruiter

View Report (Purchase Orders based on ...) As of Sep 13, 2025, 9:37 AM

Purchase Orders based on Suppliers

Supplier ID: Supplier objects Name > Purchase Order ID

Supplier ID: Supplier objects Name	Purchase Order ID
Recruiter	-0aa
	PO-001
	PO-002
	PO-003
	PO-005

Sum of Order Count Recruiter

View Report (Purchase Orders based on ...) As of Sep 13, 2025, 9:37 AM

Conclusion

The **Medical Inventory Management System** developed on Salesforce successfully demonstrates how CRM platforms can be leveraged to manage real-time inventory operations in the medical field. By creating **custom objects, fields, validation rules, flows, triggers, reports, and dashboards**, the project ensures accurate tracking of suppliers, products, purchase orders, and inventory transactions.

Project Achievements:

- Created a streamlined system for supplier and purchase order management.
- Automated order tracking and product stock updates using Flows and Triggers.
- Implemented strong security using Profiles, Roles, and Permission Sets.
- Generated real-time insights through Reports and Dashboards.

Student Learning Outcomes:

- Hands-on Salesforce CRM skills in a real-time use case.
- Ability to design custom objects, automation, and security models.
- Improved teamwork and collaboration in managing project lifecycle.
- Exposure to industry practices in CRM and inventory management.

Future Scope:

- Integration with barcode scanners for product entry.
- Mobile App support for order approvals and supplier management.
- Advanced AI-driven demand forecasting and stock optimization.
- Multi-branch scalability for large healthcare organizations.

