

MEDICAL INVENTORY MANAGEMENT
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INTRODUCTION

1. Project Overview

Efficient management of medical inventory is crucial for hospitals, pharmacies, and healthcare centers to ensure uninterrupted patient care and avoid shortages or overstocking of essential medicines, equipment, and supplies. A *Medical Inventory Management System (MIMS)* is designed to automate, track, and streamline the handling of medical stock, from procurement to usage, thereby improving operational efficiency and reducing human error. The system maintains a digital record of all medical supplies, including drugs, surgical equipment, disposables, and diagnostic tools. It monitors stock levels, expiry dates, and supplier details in real time, enabling timely replenishment and minimizing wastage due to expired items. The system also generates alerts for low-stock and near-expiry products, helping staff take proactive measures. By integrating reporting and analytics features, the system supports decision-making through insights on consumption patterns, supplier performance, and cost optimization. Additionally, role-based access ensures data security, while barcode/QR code scanning can enhance accuracy in stock updates. Overall, the project aims to provide a reliable, user-friendly, and scalable solution that ensures better resource utilization, reduces operational costs, and ultimately contributes to improved healthcare delivery.

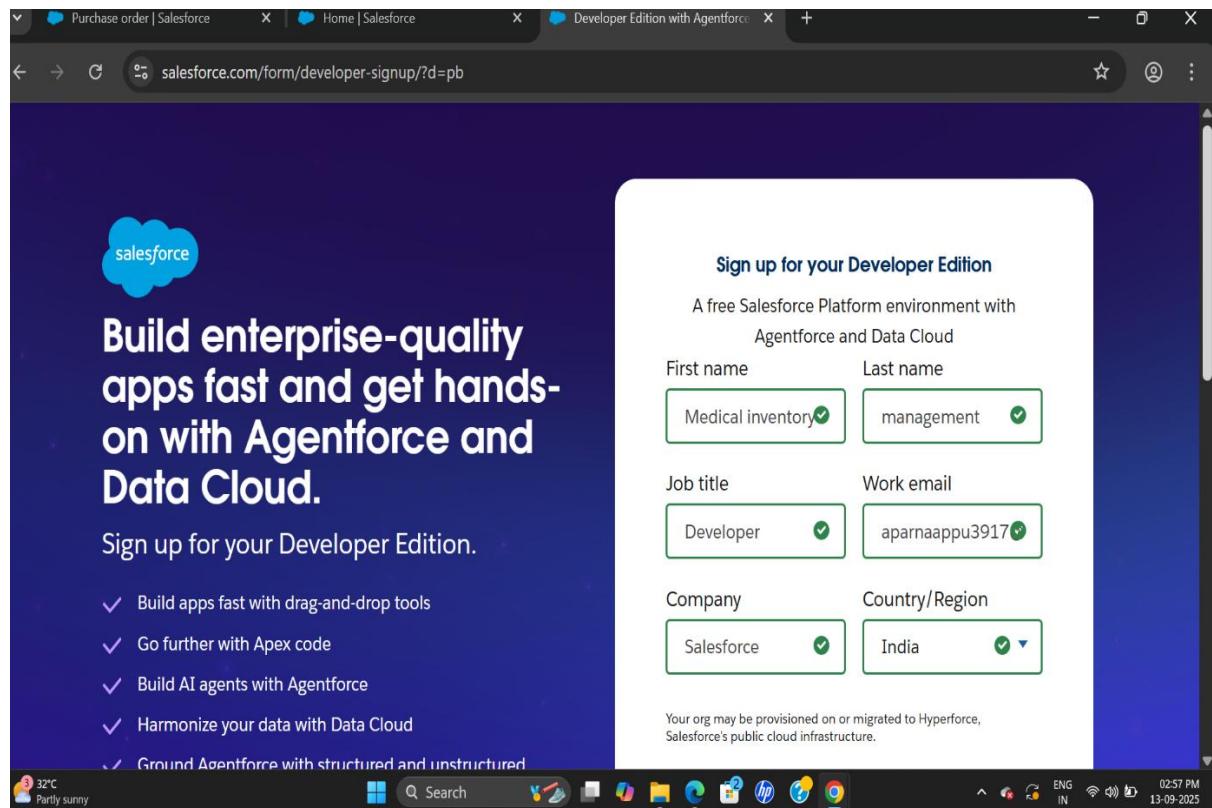
2.Purpose

The main objective of the Medical Inventory Management System is to ensure efficient and accurate handling of medicines, equipment, and other medical supplies within healthcare organizations. The project aims to automate inventory-related processes such as procurement, stock updates, and reporting in order to reduce human errors and save time. It focuses on monitoring the availability of medical items in real time, preventing both shortages and overstocking, while also keeping track of expiry dates to minimize wastage and ensure patient safety. The system will provide timely alerts for low-stock or near-expiry items, enabling staff to take proactive measures. Additionally, it will streamline supplier and purchase management by maintaining supplier details, tracking orders, and analyzing purchasing trends for cost efficiency. Role-based access control will enhance security by allowing only authorized users to manage sensitive data. By generating analytical reports and insights on usage patterns, the system will support better decision-making and resource allocation. Ultimately, the objective of the project is to provide a reliable, scalable, and user-friendly solution that guarantees uninterrupted availability of essential medical resources, reduces operational costs, and improves the overall quality of healthcare delivery.

DEVELOPMENT PHASE

1. Creating Development Account:

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



2. Created Object : Product, Purchase Order, Order Item, Inventory Transaction and Supplier objects.

Setup > Object Manager > Product

Edit Custom Object: Product

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Products **Plural Label:** Products **Example:** Account

Object Name: Product_ID **Record Name:** Product_ID **Description:**

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window

Content Name: None

Enter Record Name Label and Format:

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Product_ID **Example:** Account Name

Data Type: Text **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features:

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Object Classification:

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Help for this Page

Setup > Object Manager > Purchase order

Edit Custom Object: Purchase order

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Purchase order **Plural Label:** Purchase orders **Example:** Account

Object Name: Purchase_order **Record Name:** Purchase_order **Description:**

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window

Content Name: None

Enter Record Name Label and Format:

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Purchase_order **Example:** Account Name

Data Type: Text **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features:

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Object Classification:

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Setup > Object Manager

Order Item

[Edit Custom Object](#)

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in lists, page layouts, and reports. Be careful when changing the name or label as it may affect integrations and merge templates.

Label: Order Item Example: Account

Plural Label: Order Items Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Order_item Example: Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Content Name: Order item ID Example: Account Name

Data Type: Text Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features:

- Allow Reports
- Allow Activities
- Track Field History
- Create in Center Groups
- Enable Licensing

Object Classification:

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Setup > Object Manager

Inventory Transaction

[Edit Custom Object](#)

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in lists, page layouts, and reports. Be careful when changing the name or label as it may affect integrations and merge templates.

Label: Inventory Transaction Example: Account

Plural Label: Inventory Transactions Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Inventory_Transaction Example: Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Content Name: Order item object Example: Account Name

Data Type: Text Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features:

- Allow Reports
- Allow Activities
- Track Field History
- Create in Center Groups
- Enable Licensing

Object Classification:

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access

The screenshot shows the 'Object Manager' section of the Salesforce Setup. A specific object, 'Supplier', is selected for editing. The main area displays the 'Custom Object Definition Edit' page. Key fields visible include:

- Label:** Supplier
- Plural Label:** Suppliers
- Description:** (Empty text area)
- Record Name:** Supplier
- Data Type:** Text
- Optional Features:** Checkboxes for Allow Reports, Allow Details, Track Field History, Allow in Chatter Groups, and Enable Licensing.
- Object Classification:** Checkboxes for Allow Bulk API Access and Allow Streaming API Access.

3. Tabs

The screenshot shows the 'Custom Tabs' page in the Salesforce Setup. It includes sections for:

- Custom Tabs:** A general overview with a note about creating new tabs to extend functionality.
- Custom Object Tabs:** A table listing five tabs:

Action	Label	Tab Style	Description
Edit Del	Inventory_Transactions	Bank	
Edit Del	Order_Items	Fan	
Edit Del	Products	Bell	
Edit Del	Purchase_orders	Apple	
Edit Del	Suppliers	Bridge	
- Web Tabs:** A section stating 'No Web Tabs have been defined'.

4.Developed Lightning App

The screenshot shows the 'App Details & Branding' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings' with 'App Details & Branding' selected. The main area contains fields for 'App Name' (Medical Inventory Management), 'Developer Name' (Medical_Inventory_Management), and 'Description' (Medical Inventory Management). It also includes sections for 'App Branding' (with an image and primary color hex value #0070D2) and 'Org Theme Options' (unchecked). A preview of the app launcher is shown on the right.

The screenshot shows the 'Navigation Items' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings' with 'Navigation Items' selected. The main area displays a list of 'Available Items' (Accounts, Activation Targets, Activations, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations) and a list of 'Selected Items' (Dashboards, Reports, Products, Purchase orders, Order Items, Inventory Transactions, Suppliers). Navigation arrows allow items to be moved between the two lists.

The screenshot shows the Lightning App Builder interface with the URL <https://orgfarm-959f9fd559-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02ugK000006ZPHpQAO&retUrl=https%3A%2F%2Fwww.google.com>. The page title is "Medical Inventory Management". The left sidebar has sections for "App Settings" (selected), "App Details & Branding", "App Options", "Utility Items (Desktop Only)", and "Navigation Items". Under "User Profiles", it says "Choose the user profiles that can access this app." A search bar "Type to filter list..." is at the top of the "Available Profiles" list. The list includes: Analytics Cloud Integration User, Analytics Cloud Security User, Anypoint Integration, Authenticated Website, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, Custom: Marketing Profile, and Custom: Sales Profile. To the right, under "Selected Profiles", "System Administrator" and "Inventory Manager" are listed. There is a footer bar with "javascipt:void(0)".

5. Fields like current stock level, minimum stock level, product description, product ID, product name, unit price

The screenshot shows the Object Manager setup page for a "Product" object. The URL is <https://orgfarm-959f9fd559-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK00002D3TZ/FieldsAndRelationships/>. The page title is "Product". The left sidebar lists various setup categories. The main area shows a "Custom Field Definition Edit" for a field named "Current Stock Level". The "Field Information" section includes: Field Label "Current Stock Level", Field Name "Current_Stock_Level", Description (empty), Help Text (empty), Data Owner "User", Record Usage "None", Data Sensitivity Level "None", and Compliance Configuration with "Available" and "Chosen" checkboxes. The "General Options" section includes: Required (unchecked), Unique (unchecked), External System (unchecked), AI Prediction (unchecked), Default Value (set to "Show Formula Editor"), and a note about AI Predictions. The "Number Options" section includes: Length "15", Decimal Places "0", and a note about decimal places. Buttons for "Change Field Type", "Save", and "Cancel" are at the bottom.

Home | Salesforce | Object Manager | Medical Invento | Tabs | Salesforce

orgfarm-959f9fd559-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000

The screenshot shows the Salesforce Setup interface for the Object Manager. The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, and Validation Rules. The main content area is titled 'Edit Product Custom Field Minimum Stock level'. It contains sections for 'Field Information' (Field Label: 'Minimum Stock level', Field Name: 'Minimum_Stock_level', Data Type: Number), 'General Options' (Required checked, Unique, External ID, AI Prediction, Default Value), and 'Number Options' (Length: 18, Decimal Places: 0). A note at the bottom of the General Options section provides formula syntax information.

Setup Home Object Manager

SETUP > OBJECT MANAGER
Product

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Edit Product Custom Field Minimum Stock level

Custom Field Definition Edit

Field Information

Field Label: Minimum Stock level
Field Name: Minimum_Stock_level
Description:
Help Text:
Data Owner: User
Field Usage: None
Data Sensitivity Level: None
Compliance Categorization:

Available	Chosen
PII	
HIPAA	
GDPR	
PCI	

General Options

Required: Always require a value in this field in order to save a record
 Unique
 External ID
 AI Prediction
 Default Value
 Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes ("Text_Value"), include numbers without quotes : (25), show percentages as decimals (.010), and express date calculations in the standard format: (Today) + 7; To reference a field from a Custom Metadata type record use: \$CustomMetadata_Type__mdtRecord\$FieldName\$Field__c

Number Options

Length: 18
Decimal Places: 0

Change Field Type Save Cancel

The screenshot shows the Salesforce Object Manager interface for a custom field named "Product Description". The "Field Information" section includes fields for Label ("Product Description"), Name ("Product_Description"), Description, Help Text, Data Owner ("User"), Field Usage ("None"), and Date Sensitivity Level ("None"). The "Compliance Categorization" section lists "Available" categories: PII, HIPAA, GDPR, and DLT, with "Chosen" next to PII. The "General Options" section contains a "Required" checkbox (unchecked) and a "Default Value" field. A note at the bottom states: "User can't insert or update record if picklist value (PII) is not selected in dropdown. 'The field' include names without quotes." At the bottom right are "Change Page Type", "Save", and "Cancel" buttons.

orgfarm-959f9fd559-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002D3TZ/FieldsAndRelationships/...

Setup Home Object Manager

SETUP > OBJECT MANAGER Product

Details Fields & Relationships

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

Field Product ID

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Product ID Example: Account Name

Data Type: Text

Recent Accounts

Account Name	City
Acme	New York
Digital Media	Toronto
salesforce.com	San Francisco

Save Cancel Help for this Page

This screenshot shows the 'Product' object's 'Fields & Relationships' section. It displays the 'Product ID' field configuration, which is a standard Text field. A preview window shows recent account records: Acme (New York), Digital Media (Toronto), and salesforce.com (San Francisco). The 'Recent Accounts' table has columns for 'Account Name' and 'City'.

orgfarm-959f9fd559-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002D3TZ/FieldsAndRelationships/...

Setup Home Object Manager

SETUP > OBJECT MANAGER Product

Details Fields & Relationships

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

Custom Product Custom Field Product Name

Custom Field Definition Edit

Field Information

Field Label: Product Name
Field Name: Product_Name
Description:
Help Text:
Data Owner: User
Field Usage: None
Data Sensitivity Level: None
Compliance Categories: Available (HIPAA, GDPR, PCI) Chosen (None)

General Options

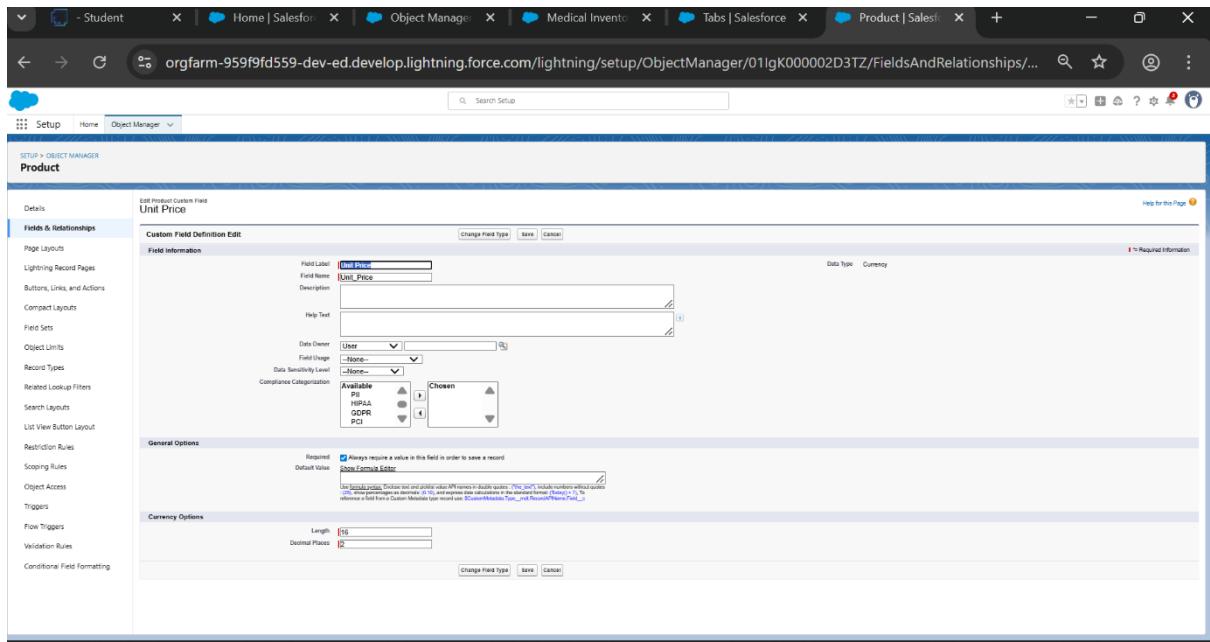
Required: Always require a value in this field in order to save a record
Unique: Do not allow duplicate values
External ID: Set this field as the unique record identifier from an external system
Default Value: Show Formula Editor

Text Options

Length: 255

Change Field Type Save Cancel Help for this Page

This screenshot shows the 'Product' object's 'Fields & Relationships' section. It displays the 'Product Name' custom field configuration, which is a standard Text field. The 'General Options' section includes 'Required' (checked), 'Unique' (unchecked), and 'External ID' (unchecked). The 'Text Options' section shows a length of 255. The 'Change Field Type' button is visible at the bottom.



6. Editing of Page Layouts: Product Object ,Purchase Order Object,Order Item Object, inventory transaction, supplier object.

- Student

Product | Salesforce

orgfarm-959f9fd559-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002D3TZ/PageLayouts/00hgK00...

Setup Home Object Manager

SETUP > OBJECT MANAGER Product

Product Layouts

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 Layouts

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Product Layout

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

Fields

Section

Quick Actions

Buttons

Modals & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Last Modified By Product ID

Created By Minimum Stock Level Product Name

Current Stock Level Unit Price

Product Sample

Highlights Panel

Customize the highlights panel for this page layout.

Quick Actions in the Salesforce Classic Publisher

Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions

Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Product Detail

Standard Buttons Edit Delete Clone Change Owner Change Record Type Printable View Sharing Edit Labels

Information (Header visible on edit only)

Product ID Sample Text

Product Name Sample Text

Product Description Sample Text

System Information (Header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

Custom Buttons

Unit Price \$123.45

Current Stock Level 10000

Minimum Stock Level 20000

Owner Sample Text

32°C ENG 03:20 PM

- Student

Purchase order | Salesforce

orgfarm-959f9fd559-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002CMBh/PageLayouts/00hgK00...

Setup Home Object Manager

SETUP > OBJECT MANAGER Purchase order

Purchase order Layouts

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 Layouts

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Purchase order Layout

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

Fields

Section

Quick Actions

Buttons

Modals & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Expected Delivery Date Purchase Order ID Supplier ID

Actual Delivery Date Total Order Cost

Created By Order Date

Information (Header visible on edit only)

Purchase Order ID Sample Text

Supplier ID Sample Text

Actual Delivery Date \$123.45

Total Order Cost \$123.45

Owner Sample Text

Expected Delivery Date 01/12/2025

System Information (Header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

Custom Buttons

The screenshot shows the Salesforce Object Manager interface for the Order Item object. The left sidebar lists various setup categories like Details, Fields & Relationships, and Page Layouts. The main area is titled 'Order Item Layout' and displays the 'Order Item Sample' page. A 'Highlights Panel' section is visible. Below it, the 'Quick Actions in the Salesforce Classic Publisher' and 'Salesforce Mobile and Lightning Experience Actions' sections are shown. At the bottom, the 'Order Item Detail' section contains fields such as Order item ID, Name, Purchase order, and Last Modified By. A 'Mobile Cards (Salesforce mobile only)' section is also present.

The screenshot shows the Salesforce Object Manager interface for the Inventory Transaction object. The left sidebar lists various setup categories. The main area is titled 'Inventory Transaction Layout' and displays the 'Inventory Transaction Sample' page. Similar to the Order Item layout, it includes sections for Highlights Panel, Quick Actions, and Salesforce Mobile and Lightning Experience Actions. The 'Inventory Transaction Detail' section at the bottom contains fields like Buttons, Quick Actions, and Mobile & Lightning Actions. A note at the bottom indicates the URL for the page layout configuration: <https://orgfarm-959f9fd559-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01lgK000002Cu0T/PageLayouts/page?address=%2Flayouteditor%2FlayoutEditor.apexp%3D01lgK000002Cu0T%26lid%3D...>

The screenshot shows the Salesforce Setup interface for the 'Supplier' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The 'Page Layouts' section is currently selected. The main area displays the 'Supplier Layout' configuration. It includes a toolbar with Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. A 'Fields' section lists Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. Below this is a 'Supplier Sample' panel with sections for Highlights Panel, Quick Actions in the Salesforce Classic Publisher, and Salesforce Mobile and Lightning Experience Actions. At the bottom is a 'Supplier Detail' section with standard buttons like Find, Delete, Create, Change Owner, Print, and Share.

7. Compact layouts: Product object, Purchase object

The screenshot shows the Salesforce Setup interface for the 'Product' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The 'Compact Layouts' section is currently selected. The main area displays the 'Edit Product Compact Layout' configuration. It includes a 'Compact Layout Edit' section with fields for Label (Product_Compact_Layout) and Name (Product_Compact_Layout). Below this is a 'Select Compact Layout Fields' section where fields like Created By, Last Modified By, Minimum Stock Level, Owner, and Product ID can be added to the Selected Fields list. The Available Fields list includes Product Name, Unit Price, and Current Stock Level. A note at the bottom states: 'Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.' There are 'Save' and 'Cancel' buttons at the bottom.

8. Validation rules

9. Profiles: Inventory Manager Profile, Purchase Manager Profile

Action	Profile Name	User License
<input type="checkbox"/> Edit Clone	Salesforce API Only System Integrations	Salesforce Integration
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform
<input type="checkbox"/> Edit Clone	Standard User	Salesforce
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text" value="Inventory Manager"/>

The screenshot shows the Salesforce Setup interface with the following details:

- Profile Edit:** Standard User
- User License:** Standard User
- Custom App Settings:** Shows visibility and default settings for numerous apps like All Tabs, Analytics Studio, App Launcher, Approvals, Automation, Bolt Solutions, Community, Content, Data Cloud, Data Manager, Digital Experiences, Lightning Usage App, Marketing CRM, Medical Inventory Management, My Service Journey, Queue Management, Sales, Sales Cloud Mobile, Sales Console, Salesforce Chatter, Salesforce Scheduler Setup, Sample Console, Service, Site.com, Subscription Management, and WDC.
- Service Provider Access:** Shows tab settings for Home, Accounts, and Contacts.

The screenshot shows the Salesforce Setup interface with the following details:

- Profile Edit:** Standard User
- Setup:** Profiles
- Password Policies:** Configuration for user password expiration and history, minimum length, complexity requirements, password question, maximum invalid logins, lockout period, and obscure secret answer options.

10. Permission Sets

- Student

Permission Sets | Salesforce

orgfarm-959f9fd559-dev-ed.lightning.force.com/lightning/setup/PermSets/home

Setup Home Object Manager

Search Setup

Permission Sets

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

Clone (Legacy) Data Cloud Data Aware Specialist This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfdc... Customer Data Platform

Clone (Legacy) Data Cloud Marketing Admin Allows access to Data Cloud Setup if the user is also a Salesforce admin, manag... Customer Data Cloud for Marketing

Clone (Legacy) Data Cloud Marketing Manager This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfdc... Customer Data Platform

Clone (Legacy) Data Cloud Marketing Specialist This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfdc... Customer Data Platform

Clone (Legacy) Data Cloud for Marketing Data Aware Specialist This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfdc... Customer Data Cloud for Marketing

Clone (Legacy) Data Cloud for Marketing Manager This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfdc... Customer Data Cloud for Marketing

Clone (Legacy) Data Cloud for Marketing Specialist This Data Cloud permission set will be deprecated in Spring '24. Learn more at sfdc... Customer Data Cloud for Marketing

Clone Access Agenforce Default Agent Gives users access to the default Agenforce agent in Salesforce. Agenforce (Default)

Clone Agent Platform Builder Allow access to agent platform. Agent platform builder

Clone Agenforce Default Admin Allows users to build and manage in-org copilot. Agenforce (Default)

Clone Agenforce Service Agent Configuration Build and manage autonomous AI service agents. Agenforce Service Agent Builder

Clone Agenforce Service Agent Object Access Access knowledge articles and manage cases and contacts as an autonomous AI s... Agenforce Service Agent User

Clone Agenforce Service Agent Secure Base Set up and use Agenforce Service Agent actions with enhanced data security. Agenforce Service Agent User

Clone Agenforce Service Agent User Analyze topics and perform actions as an autonomous AI service agent. Agenforce Service Agent User

Clone Authenticated Payer An authenticated external user with the ability to make and manage their payments. Salesforce Payments External

Clone Buyer Allows access to the store. Lets users see products and categories, make purchases. B2B Buyer Permission Set One Seat

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

1-25 of 85 | 0 Selected | Page 1 of 4

- Student

Permission Sets | Salesforce

orgfarm-959f9fd559-dev-ed.lightning.force.com/lightning/setup/PermSets/page?address=%2Fudd%2FPermissionSet%2Fnew...

Setup Home Object Manager

Search Setup

Permission Sets

Permission Set Create

Enter permission set information

Label: Purchase manager create Access * Required Info

API Name: Purchase_manager_create_Access

Description:

Session Activation Required:

Select the type of users who will use this permission set

Who will use this permission set?

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

Not sure what a permission set license is? [Learn more here.](#)

License:

Save Cancel

The screenshot shows the Salesforce 'Permission Sets' page under 'SETUP'. A specific permission set named 'Purchase Manager Create Access' is selected. In the 'Object Settings' section, the 'Order Items' tab is active. Under 'Tab Settings', the 'Available' checkbox is checked and highlighted with a red box. In the 'Object Permissions' section, the 'Enabled' column for 'Create' and 'Edit' permissions is checked and highlighted with a red box. The 'Save' button is also highlighted with a red box.

11. Flows

The screenshot shows the 'New Flow' starting screen. It asks 'Select how you'd like to start building your automation.' Two options are shown: 'Start From Scratch' (selected) and 'Use a Template'. The 'Start From Scratch' option is highlighted with a red box. Below the options is a 'Back' button.

New Flow

Core All + Templates

 Screen Flow Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and ...	 Record-Triggered Flow Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
 Schedule-Triggered Flow Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.	 Platform Event—Triggered Flow Launches when a platform event message is received. This autolaunched flow runs in the background.
 Autolaunched Flow (No Trigger) Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.	 Record-Triggered Orchestration Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

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



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



Because this flow runs *before* a record is saved, you can only update the record that triggered the flow. If you want 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 X
+ Add Field	

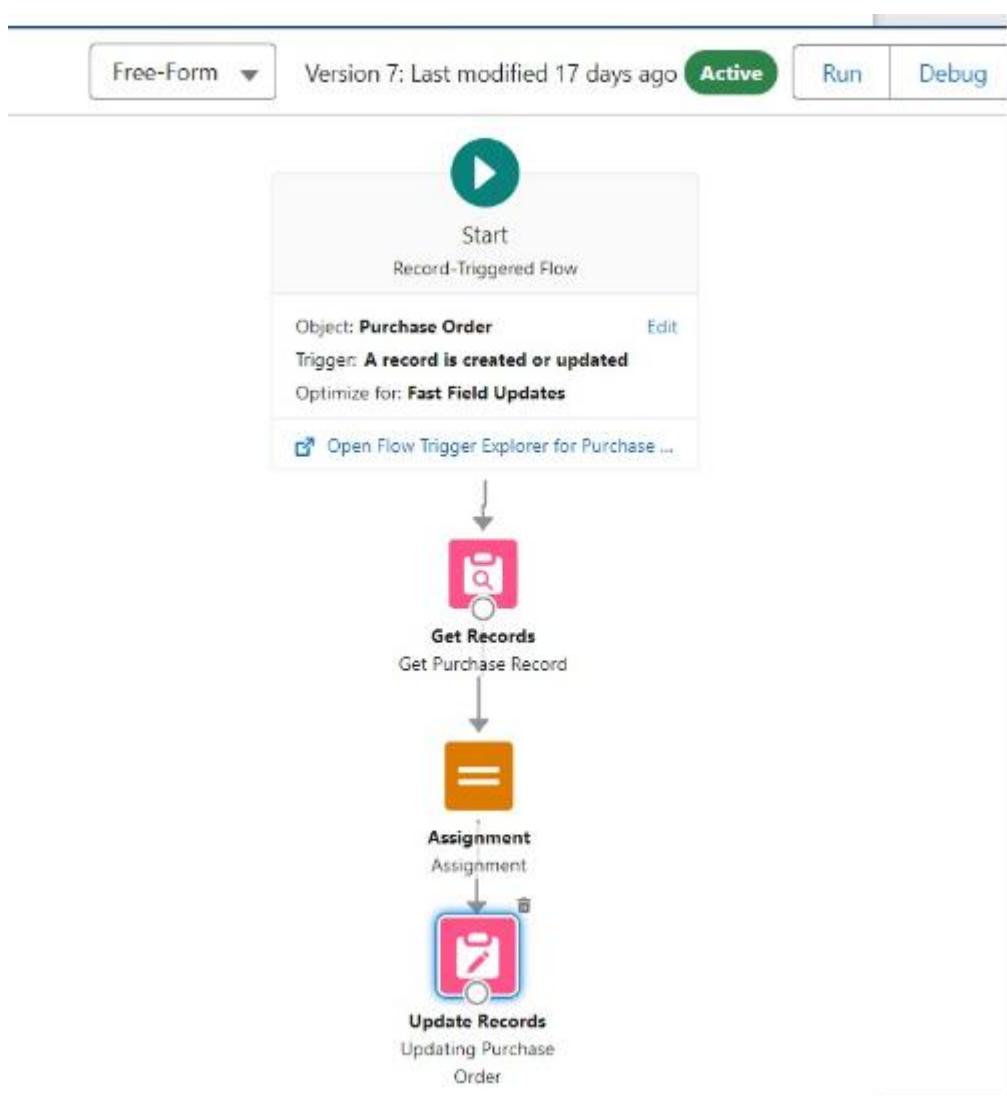
= Assignment

* Label	* API Name
Assignment	Assignment_1
Description	

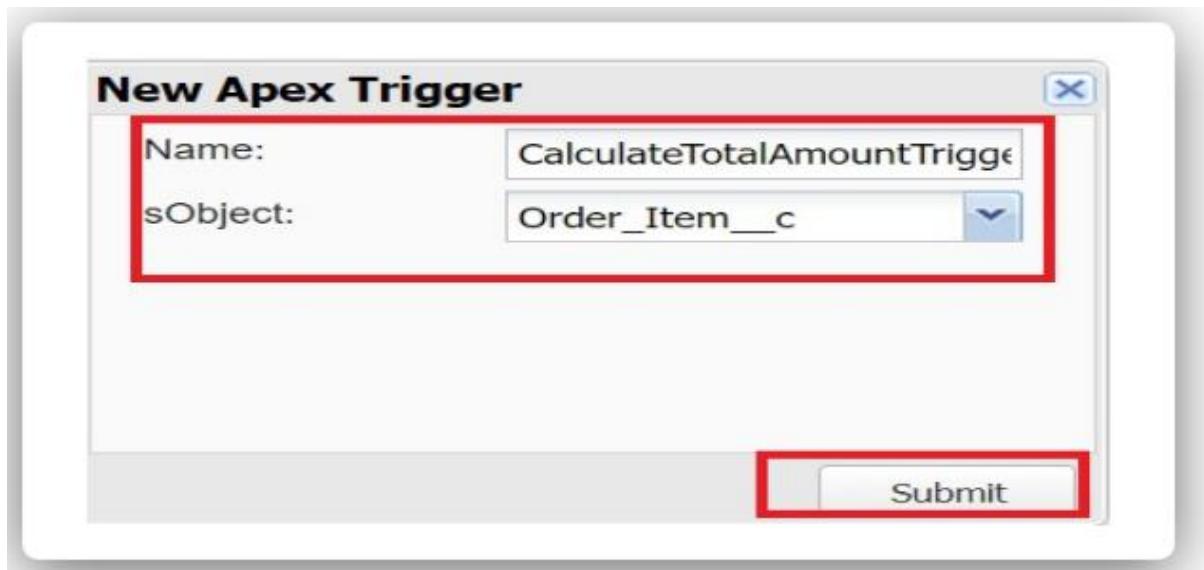
Set Variable Values

Each variable is modified by the operator and value combination.

Variable	Operator	Value
ActualDeliveryDate X	Equals	\$Re
ActualDeliveryDate X	Add	3
+ Add Assignment		



11. Triggers



The screenshot shows the Salesforce Developer Console with the following code:

```
trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete)
{
    // Call the handler class to handle the logic
    CalculateTotalAmountHandler calc = new CalculateTotalAmountHandler();
    calc.calculateTotal(w, Trigger.old, Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete);
}
```

A tooltip for the 'CalculateTotalAmountHandler' class is displayed, showing the 'New Apex Trigger' dialog box with the same settings as the previous screenshot. The tooltip also includes a 'Submit' button. Below the code editor, the 'Logs', 'Tests', 'Checkpoints', 'Query Editor', 'View State', 'Progress', and 'Problems' tabs are visible. The 'Problems' tab shows one error: 'Method does not exist or incorrect signature: void calculateTotal(List<List<Boolean>, Boolean, Boolean, Boolean, Boolean) from the type CalculateTotalAmountHandler'.

12. Reports

Create Report

Category	Report Type Name	Category
Recently Used	Purchase Orders	Standard
All	Purchase Orders with Supplier ID	Standard
Accounts & Contacts	Purchase Orders with Order Items	Standard
Opportunities	Purchase Orders with Order Items and Product ID	Standard
Customer Support Reports	Inventory Transactions with Purchase Order ID	Standard
Leads		
Campaigns		
Activities		
Contracts and Orders		

Filters

Add filter...

Show Me
All purchase orders

Actual Delivery Date
All Time

The screenshot shows a Salesforce report preview window. The title bar reads "orgfarm-959f9fd559-dev-ed.develop.lightning.force.com/lightning/r/Report/00OgK0000050XQvUAM/edit?queryScope=userFol...". The main content area is titled "Purchase Orders based on Suppliers" and "Purchase orders". The left sidebar has sections for "Fields" (Outline, Filters, Groups, Purchase order, Supplier ID) and "Columns" (# Total Order cost). The center pane displays a message: "Previewing a limited number of records. Run the report to see everything." It includes a filter bar with "Purchase order: Purchase order ID", "Supplier ID", and "Total Order cost". Below the message, it says "No records returned in preview. Try running the report or editing report filters." with options to "Show All purchase orders" or "Edit other filters in the filter panel". At the bottom, there are buttons for "Add Chart", "Save & Run", "Save", "Close", and "Run". A status bar at the bottom right shows "Conditional Formatting", "Row Counts", "Detail Rows", "Subtotals", "Grand Total", and a timestamp "13-09-2025".

12. Dashboards

The screenshot shows a "Select Report" dialog box overlaid on a browser window. The browser title is "Medical Inventory DashBoard | Sel...". The dialog has a sidebar with "Reports" (Recent: Created by Me, Private Reports, Public Reports, All Reports) and "Folders" (Created by Me, Shared with Me, All Folders). The main area is titled "Select Report" and contains a search bar "Search Reports and Folders..." and a list of reports: "Purchase Orders based on Suppliers" (Apama M - Sep 13, 2025, 1:04 AM - Private Reports). At the bottom are "Cancel" and "Select" buttons. The status bar at the bottom right shows "Show desktop", "ENG IN", and a timestamp "03:58 PM".

Screenshot of the "Medical Inventory Dashboard" in Salesforce Lightning. The dashboard has a header with tabs: "Dashboards", "Reports", "Products", "Purchase orders", "Order Items", "Inventory Transactions", and "Suppliers". A search bar is at the top right. The main area shows a report titled "Purchase Orders based on Suppliers". The report interface includes a "Report" section with a dropdown for "Purchase Orders based on Supplier", a checkbox for "Use chart settings from report", and a "Display As" section with various chart icons. Below these are "X-Axis" and "Y-Axis" sections with dropdowns for "Purchase order: Purchase order ID" and "Supplier ID" respectively, and a Y-axis metric "Sum of Total Order cost". A preview window on the right shows the same report title and message "We can't draw this chart because there is no data." A "View Report" link is also present. At the bottom right of the report interface are "Cancel" and "Add" buttons.

Screenshot of the "Medical Inventory Dashboard" in Salesforce Lightning, showing the result of adding the gauge chart. The dashboard structure remains the same. The report titled "Purchase Orders based on Suppliers" now displays a gauge chart. The gauge has a scale from \$0 to \$1000, with major ticks at \$0, \$200, \$400, \$600, and \$800. The needle points to \$0. Below the gauge is a link "View Report (Purchase Orders based on Suppliers)". The rest of the dashboard is a blank grid.

ADVANTAGE & DISADVANTAGE

ADVANTAGES

1. Ensures accurate tracking of medicines, equipment, and supplies.
2. Prevents shortages and overstocking of medical items.
3. Reduces wastage by monitoring and managing expiry dates.
4. Automates stock management, saving time and reducing human errors.
5. Provides real-time visibility of inventory levels across departments.
6. Sends alerts for low-stock and near-expiry products.
7. Simplifies supplier and purchase order management.
8. Generates analytical reports for better planning and decision-making.
9. Improves data security with role-based user access.
10. Enhances operational efficiency and reduces overall costs.
11. Supports scalability and integration with other healthcare systems.
12. Ensures uninterrupted availability of resources, improving patient care.

DISADVANTAGES

- 1. High Initial Cost** – Developing or purchasing the system requires significant investment in software, hardware, and setup.
- 2. Training Requirement** – Staff must be trained to use the system effectively, which can take time and resources.
- 3. Technical Issues** – System failures, bugs, or downtime may disrupt inventory operations and affect healthcare services.
- 4. Dependency on Technology** – Over-reliance on the system can be risky if there is a power outage, internet failure, or technical breakdown.
- 5. Data Security Concerns** – If not properly secured, sensitive medical and supplier data can be vulnerable to cyberattacks or misuse.
- 6. Maintenance Costs** – Regular system updates, security patches, and technical support may add to long-term expenses.
- 7. Customization Limitations** – Some systems may not fully meet the specific needs of every hospital or pharmacy without costly customization.
- 8. Resistance to Change** – Some staff may find it difficult to adapt from manual methods to digital inventory systems.
- 9. Integration Challenges** – Linking the system with existing hospital or pharmacy management software can sometimes be complex.
- 10. Data Entry Errors** – Incorrect data input at the initial stage can lead to inaccurate reports or stock mismatches.

CONCLUSION

Medical Inventory Management System plays a vital role in improving the efficiency, accuracy, and reliability of healthcare operations. By automating stock management, tracking expiry dates, and providing real-time updates, the system helps reduce human error, prevent wastage, and ensure the uninterrupted availability of essential medical resources. Although it comes with certain challenges such as high initial costs, training requirements, and dependency on technology, the long-term benefits outweigh these limitations. The system not only enhances operational efficiency and cost-effectiveness but also supports better decision-making through data-driven insights. Ultimately, the Medical Inventory Management System contributes to improved patient care, streamlined resource utilization, and stronger healthcare delivery, making it an essential solution for modern hospitals, pharmacies, and healthcare centers.

APPENDIX

Source code : Provided in Apex classes and Triggers

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);  
}
```

Apex Classes:

```
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;

}

}

}
```