

Medical Inventory Management

User Story:

The Medical Inventory Management System is a comprehensive Salesforce application designed to streamline and manage various operational aspects of the medical inventory. It can efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor expiry dates of products, thereby improving operational efficiency, data accuracy, and reporting capabilities.

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.

Milestone 1-Salesforce Account

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

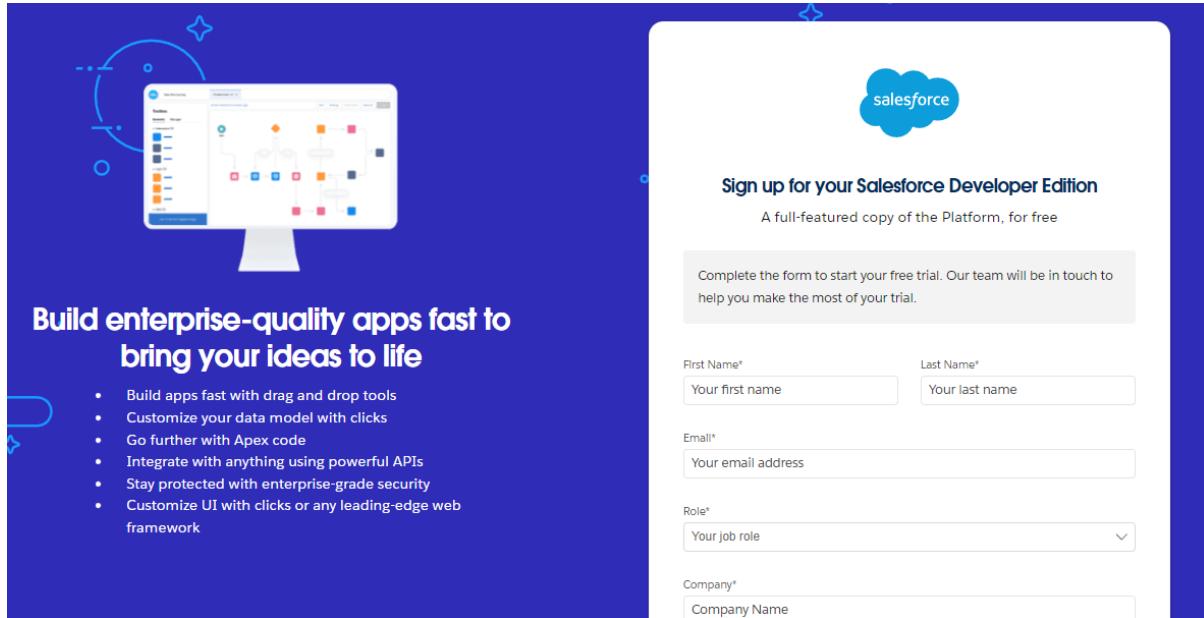
Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized.

Activity 1: Creating Developer Account

Creating a developer org in salesforce.

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



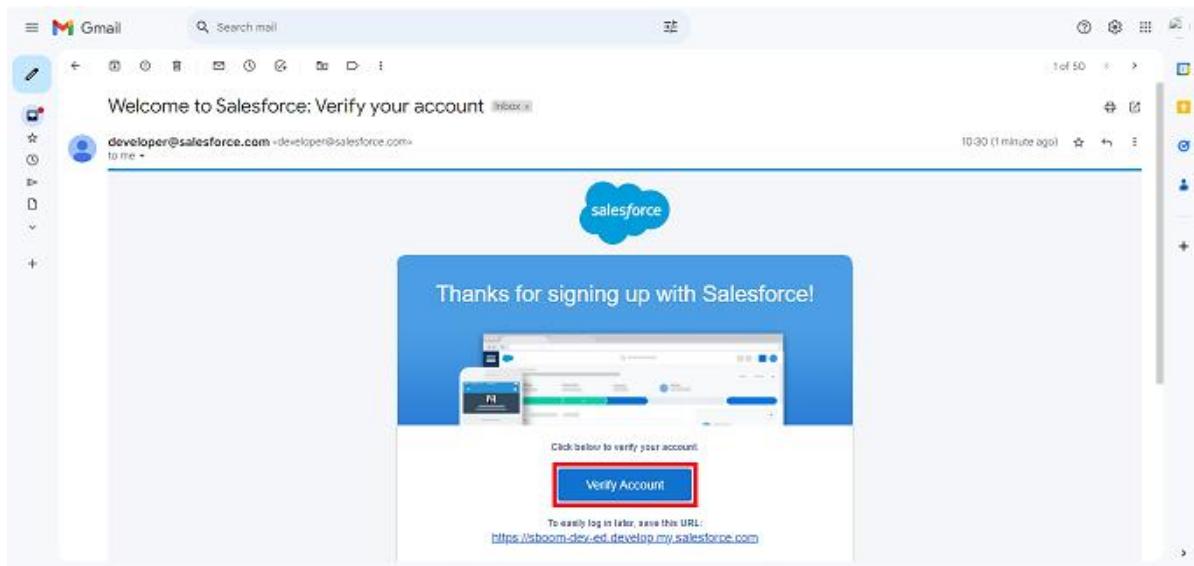
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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

Click on sign me up after filling these.

Activity 2: Account Activation

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



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

Change Your Password

Enter a new password for lead@sb.oom.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

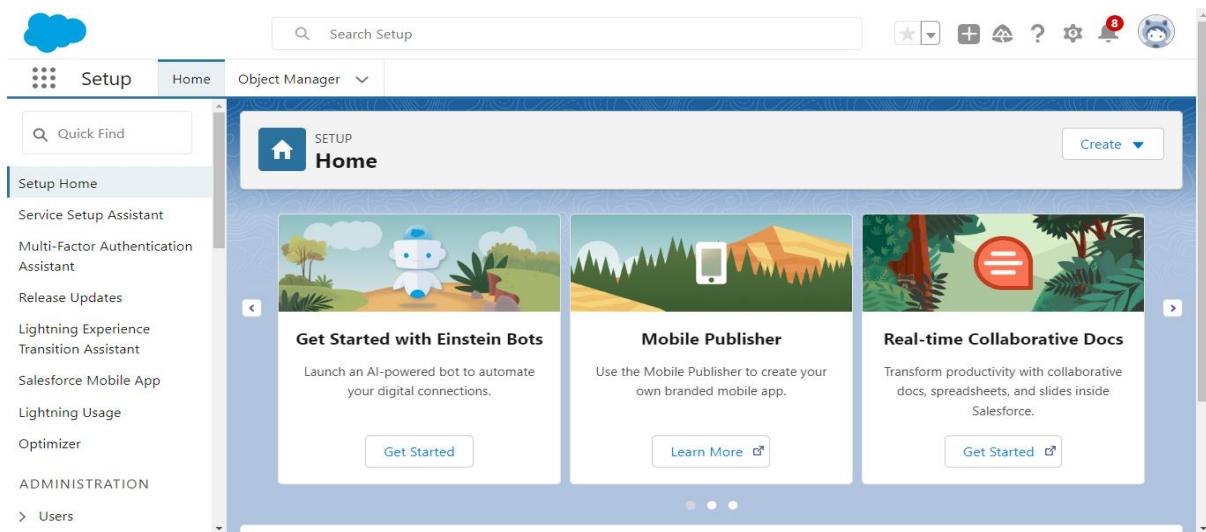
* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
asdfghjkl

Change Password

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



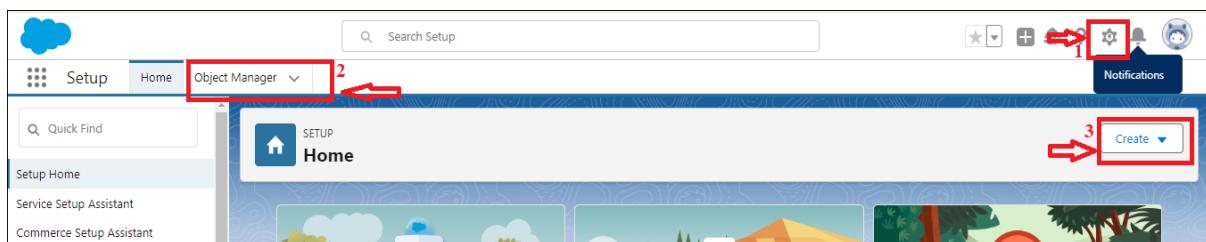
Milestone 2- Objects

In Salesforce, objects are database tables that allow you to store data specific to your organization.

Activity 1: Creating a Product Object

To create an object:

1. From the setup page
2. Click on Object Manager
3. Click on Create >> Click on Custom Object.
4. Enter the label name as Product
5. Enter Plural label name as Products
6. Enter Record Name as Product ID
7. Select Data Type as Text.
8. Select Allow reports.
9. Select Allow search.
10. Click on Save and New



Setup | Home | Object Manager

SETUP New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and records.

4 Label: Product Example: Account
5 Plural Label: Products Example: Accounts
Starts with vowel sound

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

Object Name: Product Example: Account

Description:

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

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.

6 Record Name: Product ID Example: Account Name
7 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

8 Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing [i](#)

Deployment Status

In Development
9 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

9 Allow Search

Object Creation Options (Available only when custom object is first created)

10 Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

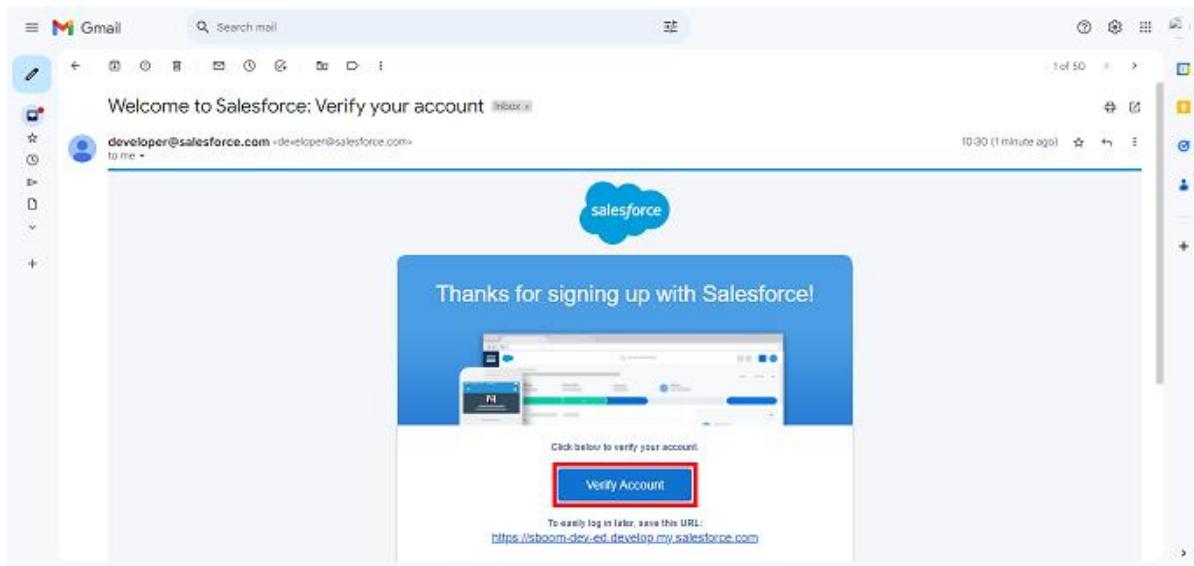
Save Save & New Cancel

Activate Windows
Go to Settings to activate Windows.

In the same way Create Purchase Order, Order Item, Inventory Transaction and Supplier objects.

Activity 2: Account Activation

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



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

Change Your Password

Enter a new password for lead@sb.oom.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password
..... Good

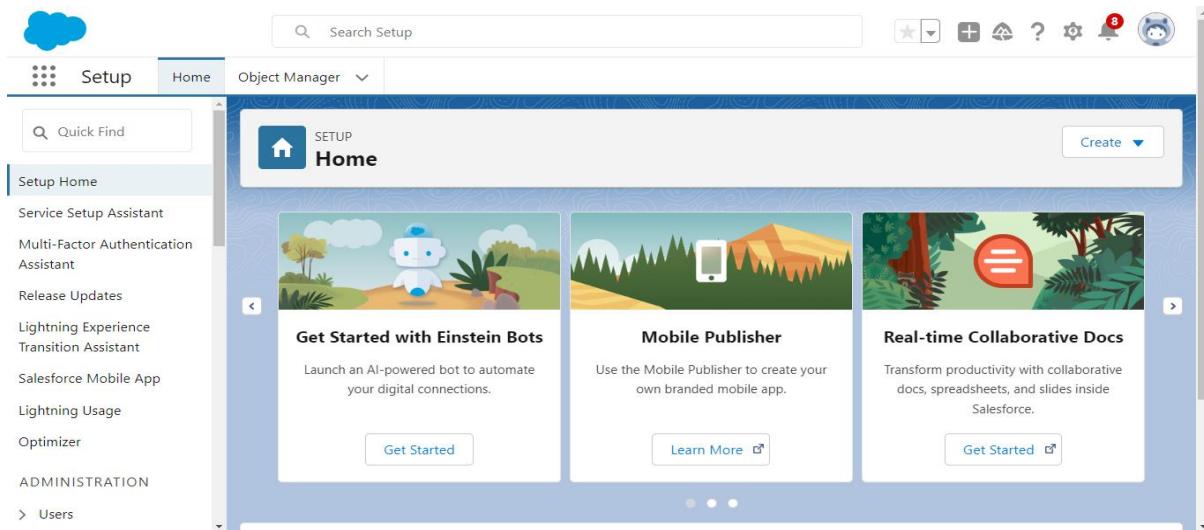
* Confirm New Password
..... Match

Security Question
In what city were you born?

* Answer
asdfghjkl

Change Password

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

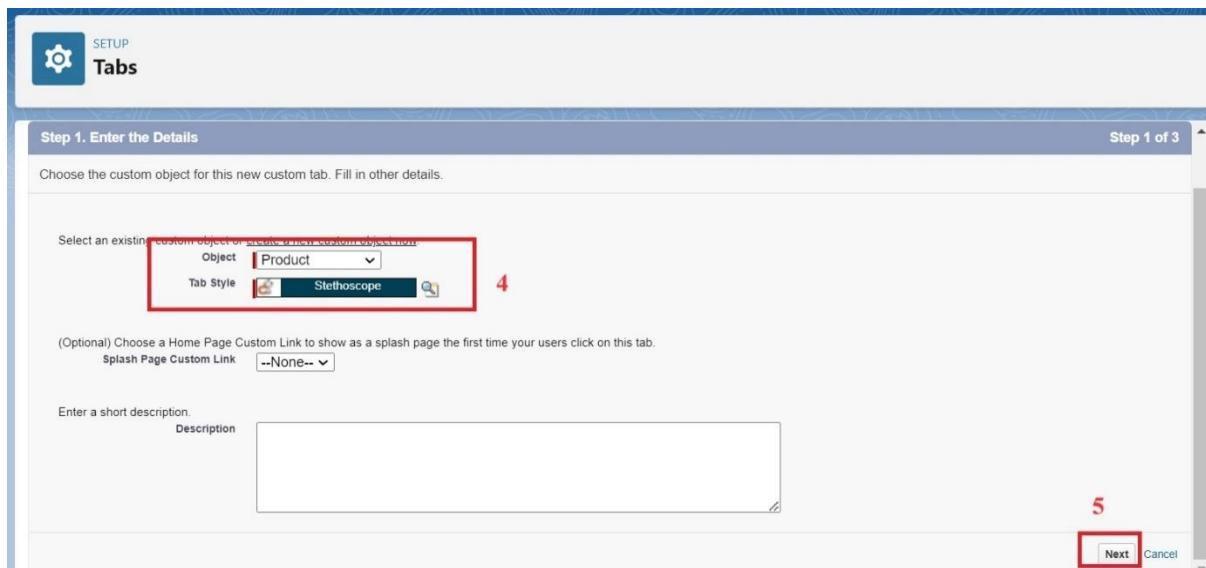


Milestone 3- Tabs

In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

Activity 1: Creating a tab for Product Object

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).
4. Select Object(Product) >> Select the tab style
5. Click on Next >> (Add to profiles page) keep it as default >> Click on Next (Add to Custom App) uncheck the include tab .
6. Make sure that the Append tab to user's existing personal customizations is checked.
7. Click save



Activity 2: Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “Purchase Order, Order Item, Inventory Transaction, Supplier”.
2. Follow the same steps as mentioned in Activity -1 .

Milestone 4- The Lightning App

A Lightning App in Salesforce is a collection of items that work together to serve a particular function for the end-users. These items can include standard and custom objects, tabs, utilities, and other productivity tools. Lightning Apps are designed to provide a more intuitive and efficient user experience compared to traditional Salesforce apps.

Activity 1: Create a Lightning App for Medical Inventory Management

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter Medical Inventory Management as the App Name >> Click on upload image and add an image related to Medical Inventory then click next
4. Under App Options, leave the default selections and click next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and move them to Selected Item and Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles.
8. Click Save & Finish.

New Lightning App

App Details

* App Name 3

* Developer Name

Description

App Branding

Image 3

Primary Color Hex Value

Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

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.

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles 7

System Administrator

Selected Profiles

Save & Finish

Milestone 5- Fields

Activity 1: Creating a Text Field in Product Object

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Product custom object.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select Text field, click Next
7. Enter Field Label as “Product Name” and Length 255.
8. Select Required Field.
9. Click Next, Next, then Save & New.

The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for Setup, Home, and Object Manager (which is highlighted with a red box). A search bar contains the text "Product". On the right side of the header, there are several icons, with the "New" icon highlighted with a red box and the number "1" indicating a new record is available. The main area displays a table of objects, with the "Product" row selected and highlighted with a red box. The "API NAME" column shows "Product_c" with a red box around it and the number "3" above it, indicating three custom fields have been created. Other rows include Fulfillment Order Product, Opportunity Product, Order Product, Product2, and Product Attribute.

The screenshot shows the "Fields & Relationships" section of the Product object setup. At the top, there are tabs for Details, Fields & Relationships (which is highlighted with a red box and has the number "4" above it), and other options like Page Layouts, Lightning Record Pages, etc. The main area shows a table of fields. The first three fields are standard lookup fields: "Created By", "Last Modified By", and "Owner", all pointing to the "User" object. The fourth field, "Product ID", is a custom text field with a length of 250 characters, indicated by the "Text(250)" value in the Data Type column. The "Indexed" column shows checkmarks for the first three fields and a dropdown arrow for the fourth.

clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text 6
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) i
- Time
- URL

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.

Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Step 2. Enter the details Step 2 of 4

Field Label i 7

Please enter the maximum length for a text field below.

Length i 7

Field Name i

Description

Help Text

Required Always require a value in this field in order to save a record 8

Unique Do not allow duplicate values

- Treat "ABC" and "abc" as duplicate values (case insensitive)
- Treat "ABC" and "abc" as different values (case sensitive)

External ID Set this field as the unique record identifier from an external system

Auto add to custom report type Add this field to existing custom report types that contain this entity i

Previous Next Cancel

9

Activity 2: Creating a TextArea Field in Product Object

To create fields in an object:

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Product custom object.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select TextArea field, click Next
7. Enter Field Label as “Product Description” .
8. Click Next, Next, then Save & New.

clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

<input type="radio"/> Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input checked="" type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
<input type="radio"/> Text (Encrypted) 	Allows users to enter any combination of letters and numbers and store them in encrypted form.
<input type="radio"/> Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:600" are all valid times for this field.
<input type="radio"/> URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Step 2. Enter the details

Step 2 of 4 Previous Next Cancel

Field Label	<input style="border: 1px solid red; width: 150px; height: 20px; vertical-align: middle;" type="text" value="Product Description"/> 	7
Field Name	<input style="width: 150px; height: 20px; vertical-align: middle;" type="text" value="Product_Description"/> 	
Description	<input style="width: 600px; height: 40px; vertical-align: middle;" type="text"/>	
Help Text	<input style="width: 600px; height: 40px; vertical-align: middle;" type="text"/>	
Required	<input type="checkbox"/> Always require a value in this field in order to save a record	
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity 	
Default Value	<input style="width: 150px; height: 20px; vertical-align: middle;" type="text" value="Show Formula Editor"/> 	
<small>Use formula syntax. Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadataType__mdt.RecordAPIName Field__c</small>		

Activity 3: Creating a Number Field in Product object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Number” and click Next.
5. Enter Field Label as “ Current Stock Level”.
6. Length - 18, Decimal Places - 0.
7. Click on Next, Next and Save.

Step 2. Enter the details Step 2 of 4

Field Label 5

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length 6 Decimal Places

Field Name 7 Number of digits to the left of the decimal point
Description
Help Text

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

Activity 4: Creating a Currency Field in Product object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Currency” and click Next.
5. Enter Field Label as “ Unit Price”.
6. Length - 16, Decimal Places - 2.
7. Select Required Field.
8. Click on Next, Next and Save.

Step 2. Enter the details Step 2 of 4

Field Label 5

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length 6 Decimal Places 7

Field Name 8 Number of digits to the left of the decimal point
Description
Help Text

Required Always require a value in this field in order to save a record
Auto add to custom report type Add this field to existing custom report types that contain this entity

Activity 5 : Creating Lookup Relationship in Purchase Order Object

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship from Purchase Order to Supplier .

1. Go to the Setup page >> click on Object manager >> type object name(Purchase Order) in the quick find bar >> click on the Purchase Order object.
2. Click on Fields & Relationship
3. Click on New.
4. Select “Lookup relationship” as data type and click Next.
5. Select the related object “Supplier”.
6. Click on Next.
7. Give Field Label as “Supplier ID” .
8. Select Required Field.
9. Click on Next , Next, Next , Save.

Specify the type of information that the custom field will contain.

Data Type

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship** 4 Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
 The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
- External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Purchase Order
New Relationship

Help for this Page ?

Step 2. Choose the related object

Select the other object to which this object is related.

Related To 5 Supplier

Step 2

Previous **Next** Cancel

6

Previous Next Cancel

Activity 6: Creating a Date Field in Purchase Order object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Date” and click Next.
5. Enter Field Label as “ Order Date”.
6. Click on Next, Next and Save.

Activity 6: Creating a Date Field in Purchase Order object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object.
2. Now click on “Fields & Relationships”
3. Click on New.

4. Select Data type as “Date” and click Next.
5. Enter Field Label as “ Order Date”.
6. Click on Next, Next and Save.

Step 2. Enter the details

Step 2 of 4

Previous **Next** **Cancel**

Field Label	<input type="text" value="Order Date"/> 5	
Field Name	<input type="text" value="Order_Date"/> 6	
Description	<input type="text"/>	
Help Text	<input type="text"/>	
Required	<input type="checkbox"/> Always require a value in this field in order to save a record	
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity	
Default Value	<input type="text" value="Show Formula Editor"/> Use formula syntax: Enclose text and picklist value API names in double quotes ("the_text"), 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: \$CustomMetadataType__mdt.RecordAPIName__c	

Activity 8: Creating a Unit Price Formula Field in Order Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Formula” and click Next.
5. Enter field label Unit Price.
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: Product_ID__r.Unit_Price__c
8. Click Next, Next, then Save.

Step 2. Choose output type

Step 2 of 5

Previous **Next** **Cancel**

Field Label	<input type="text" value="Unit Price"/> 5	Field Name	<input type="text" value="Unit_Price"/> 6
Auto add to custom report type <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity			
Formula Return Type <input type="radio"/> None Selected <input type="radio"/> Checkbox <input checked="" type="radio"/> Currency <input type="radio"/> Date <input type="radio"/> Date/Time <input type="radio"/> Number <input type="radio"/> Percent			
Select one of the data types below. Calculate a boolean value Example: <code>TODAY() > CloseDate</code> Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: <code>Gross Margin = Amount - Cost__c</code> Calculate a date, for example, by adding or subtracting days to other dates. Example: <code>Reminder Date = CloseDate - 7</code> Calculate a date/time, for example, by adding a number of hours or days to another date/time. Example: <code>Next = NOW() + 1</code> Calculate a numeric value. Example: <code>Fahrenheit = 1.8 * Celsius__c + 32</code> Calculate a percent and automatically add the percent sign to the number.			

Order Item
New Custom Field

Step 3. Enter formula

Step 3 of 5

Previous Next Cancel

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Gross Margin = Amount - Cost [\[More Examples...\]](#)

Simple Formula **Advanced Formula**

Insert Field **Insert Operator**

Unit Price (Currency) =
Product_ID__r.Unit_Price__c

Functions

-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Activity 9: Creating a Amount Formula Field in Order Item object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Formula” and click Next.
5. Enter field label Amount.
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: Quantity_Received__c * Unit_Price__c
8. Click Next, Next, then Save.

Simple Formula Advanced Formula

Insert Field **Insert Operator**

Amount (Currency) =
Quantity_Received__c * Unit_Price__c

Functions

-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Activity 10: Creating a Picklist Field in Inventory Transaction Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box>> click on the Inventory Transaction Object.
2. Now click on “Fields & Relationships” .

3. Click on New.
4. Select Data type as “Picklist” and click Next.
5. Enter Field Label as “Transaction Type”.
6. In values select “Enter values, with each value separated by a new line” and enter values as shown below.

Receipt

Issue

Adjustment

7. Click on Next, Next and Save.

Step 2. Enter the details

Step 2 of 4

Previous **Next** Cancel

Field Label 5

Values Use global picklist value set
 Enter values, with each value separated by a new line 6

Receipt
Issue
Adjustment

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set 7

Field Name

Description OneDrive - Personal Online

Activity 11: Creating a Total Order Cost Formula Field in Inventory Transaction object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Order Item object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Formula” and click Next.
5. Enter field label Total Order Cost.
6. Select formula return type Currency, Click Next
7. Create and insert Advance formula: Purchase_Order_ID__r.Total_Order_Cost__c
8. Click Next, Next, then Save.

Activity 12: Creating a Phone Field in Supplier object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box>> click on the Supplier object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Phone” and click Next.
5. Enter the Field Label as “ Phone Number”.
6. Select Required Field.
7. Click on Next, Next and Save.

Step 2. Enter the details

Field Label: Phone Number 5

Field Name: Phone_Number

Description:

Help Text:

Required Always require a value in this field in order to save a record 6

Auto add to custom report type Add this field to existing custom report types that contain this entity 7

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_Text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadataType__mdt.RecordAPIName.FieldName__c}

Activity 13: Creating a Email Field in Supplier object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box>> click on the Supplier object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Email” and click Next.
5. Enter the Field Label as “ Email”.
6. Click on Next, Next and Save.

Step 2. Enter the details Step 2 of 4

Field Label 5

Field Name 6

Description

Help Text

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

Auto add to custom report type Add this field to existing custom report types that contain this entity

Default Value

Use formula syntax: Enclose text and picklist value API names in double quotes ("the_text"), include numbers without quotes

Milestone 6 -Editing of Page Layouts

Page layouts in Salesforce are used to customize the organization, structure, and content of pages for viewing and editing records. They determine which fields, related lists, and custom links are visible to users, as well as the order and grouping of those elements.

Activity 1: To edit a Page Layout in Product Object

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product object >> Page Layouts .
2. Click on the Product Layout.
3. Drag and Arrange the field as shown below.

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

Fields

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

Quick Find Field Name

Section	Last Modified By	Product ID
Blank Space	Minimum Stock Level	Product Name
Created By	Owner	Unit Price
Current Stock Level	Product Description	

Information (Header visible on edit only)

Product ID	Sample Text	Unit Price	₹123.45
Product Name	Sample Text	Current Stock Level	12,420
Product Description	Sample Text	Minimum Stock Level	21,114
		Owner	Sample Text

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-------------	------------------	-------------

4. Click on Save.

Activity 2: To edit a Page Layout in Purchase Order Object

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box >> click on the Purchase Order object >> Page Layouts.
2. Click on the Purchase Order Layout
3. Drag and Arrange the field as shown below

4. Click on field Order Date >> click on settings >> select Required and save it.
5. Click on field Total Order Cost >> click on settings >> select Read Only and save it.
6. Click Save.

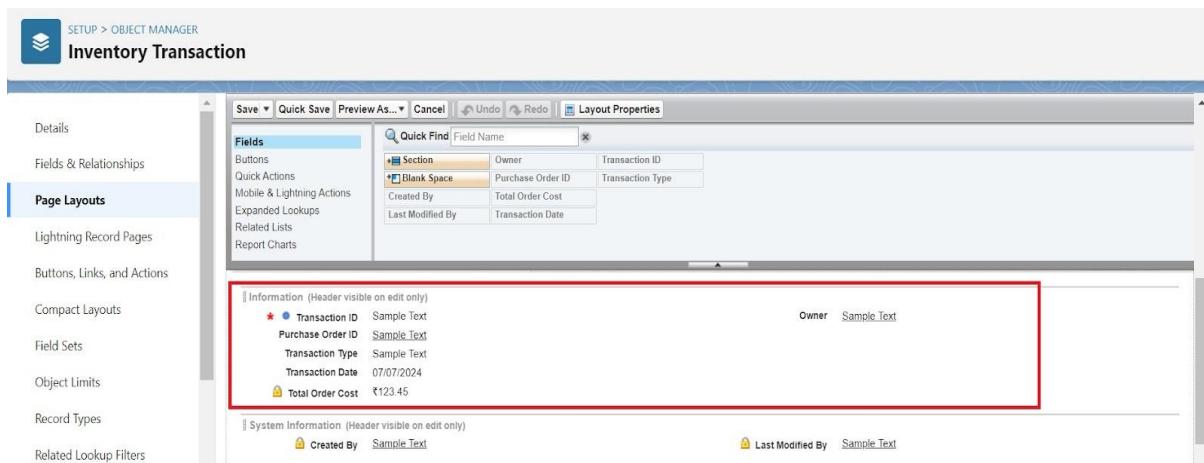
Activity 3: To edit a Page Layout in Order Item Object

1. Go to setup >> click on Object Manager >> type object name(Order Item) in quick find box >> click on the Order Item object >> Page Layouts.
2. Click on the Order Item Layout
3. Drag and Arrange the field as shown below

4. Click Save.

Activity 4: To edit a Page Layout in Inventory Transaction Object

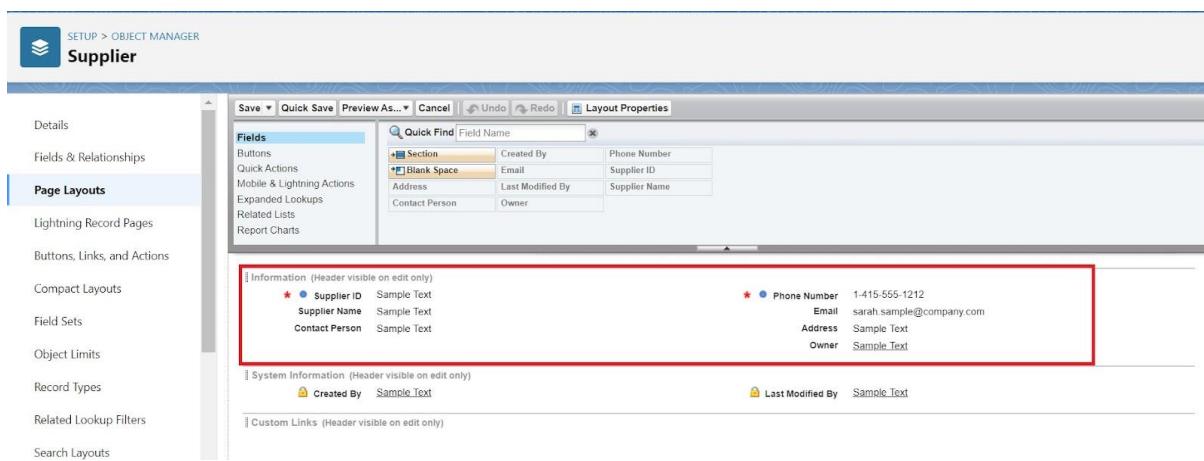
1. Go to setup >> click on Object Manager >> type object name(Inventory Transaction) in quick find box >> click on the Inventory Transaction object >> Page Layouts.
2. Click on the Inventory Transaction Layout
3. Drag and Arrange the field as shown below



4. Click Save.

Activity 5: To edit a Page Layout in Supplier Object

1. Go to setup >> click on Object Manager >> type object name(Supplier) in quick find box >> click on the Supplier object >> Page Layouts.
2. Click on the Supplier Layout
3. Drag and Arrange the field as shown below



4. Click Save.

Milestone 7 - Compact Layouts

Compact layouts display a record's key fields at a glance, providing important information quickly without needing to open the record.

Activity 1: To create a Compact Layout to a Product Object

1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product object
2. Click on Compact Layouts in the sidebar .
3. Click on New.
4. Enter the Label as "Product Compact Layout".
5. Select the Compact Layout Fields : Select Product name, Unit Price, Current Stock Level.
6. Click Save.
7. Click Compact Layout Assignment.
8. Click Edit Assignment.
9. Choose "Product Compact Layout" from the dropdown.
10. Click Save.

The screenshot shows the Salesforce Object Manager for the Product object. The left sidebar has 'Compact Layouts' selected, indicated by a red box labeled '2'. The main area shows a table of compact layouts with one item, 'System Default', listed. A red box labeled '3' is over the 'LAST MODIFIED' column. The top right has a 'New' button in a red box. Below the table is a section titled 'Enter Compact Layout Information' with fields for 'Label' (containing 'Product Compact Layout') and 'Name' (containing 'Product_Compact_Layout'). A red box labeled '4' is over the 'Label' field. The next section is 'Select Compact Layout Fields', showing a list of available fields on the left and selected fields on the right. The selected fields list contains 'Product Name', 'Unit Price', and 'Current Stock Level', all enclosed in a red box labeled '5'. At the bottom are 'Save' and 'Cancel' buttons, with 'Save' in a red box labeled '6'.

Product Compact Layouts
Compact Layout Assignment

This screenshot shows the 'Compact Layout Assignment' screen. At the top, there are 'Save' and 'Cancel' buttons. Below them, a section titled 'Primary Compact Layout' contains a dropdown menu labeled 'Primary Compact Layout: Product Compact Layout'. A red box highlights this dropdown, and the number '9' is placed to its right. At the bottom of the screen are two more 'Save' and 'Cancel' buttons, with the number '10' placed below the bottom 'Save' button.

Activity 2: To create a Compact Layout to a Purchase Order Object

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box >> click on the Purchase Order object
2. Click on Compact Layouts in the sidebar .
3. Click on New.
4. Enter the Label as “Purchase Order Compact Layout”.
5. Select the Compact Layout Fields : Select Purchase Order ID, Order Date, Total Order Cost, Supplier ID.
6. Click Save.
7. Click Compact Layout Assignment.
8. Click Edit Assignment.
9. Choose "Purchase Order Compact Layout" from the dropdown.
10. Click Save.

This screenshot shows the 'Compact Layout Edit' screen. At the top, there are 'Save' and 'Cancel' buttons. Below them, a section titled 'Enter Compact Layout Information' contains fields for 'Label' (set to 'Purchase Order Compact L') and 'Name' (set to 'Purchase_Order_Compact'). A red box highlights the 'Label' field, and the number '4' is placed to its right. The next section, 'Select Compact Layout Fields', contains a grid for managing fields. On the left is a list of 'Available Fields' (Actual Delivery Date, Created By, Expected Delivery Date, Last Modified By, Owner, Order Count). In the center is a list of 'Selected Fields' (Purchase Order ID, Order Date, Total Order Cost, Supplier ID). Between these lists are 'Add' and 'Remove' buttons. On the right, there are sorting arrows for 'Top', 'Up', 'Down', and 'Bottom'. A red box highlights the 'Selected Fields' list, and the number '5' is placed to its right. At the bottom, there are two 'Save' and 'Cancel' buttons, with the number '6' placed below the bottom 'Save' button.

Purchase Order Compact Layouts Compact Layout Assignment

10 **Save** **Cancel**

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

Primary Compact Layout: Purchase Order Compact Layout **9**

Save **Cancel**

Milestone 8 - Validation Rules

Validation rules in Salesforce are used to ensure data integrity by preventing users from saving invalid data in records. They consist of a formula or expression that evaluates the data in one or more fields and return a value of true or false. When the rule's criteria are met (i.e., the expression evaluates to true), an error message is displayed, and the user is prevented from saving the record until the issue is resolved.

Activity 1: To create an Expected Delivery Date Validation rule to a Employee Object

1. Go to setup >> click on Object Manager >> type object name(Purchase Order) in quick find box>> click on the Purchase Order object
2. Click on the validation rule >> click on New.
3. Enter the Rule name as “Expected Delivery Date Validation”.
4. Select Active
5. Insert the Error Condition Formula as :
 $(\text{Expected_Delivery_Date_c} - \text{Order_Date_c}) > 7$

Help for this Page

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 **3**

Active:

Description: **4**

Error Condition Formula

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

Display an error if Discount is more than 30%

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

Insert Field **Insert Operator**

Functions

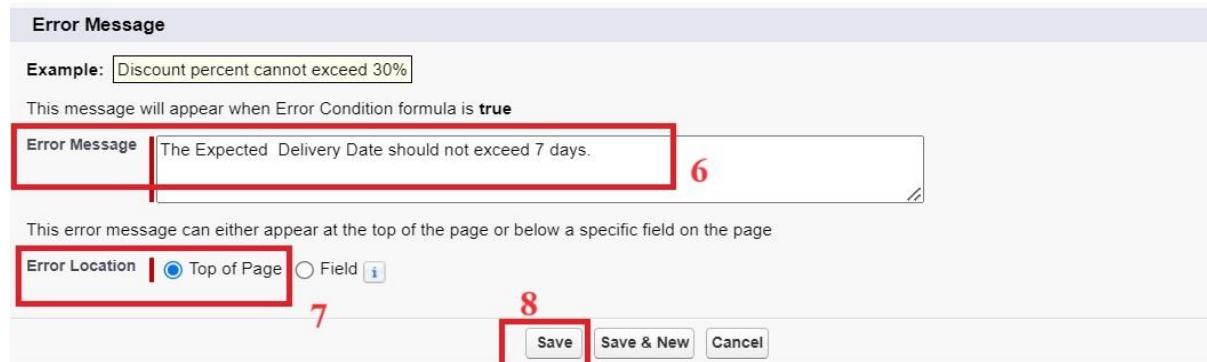
-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

6. Enter the Error Message as “The Expected Delivery Date should not exceed 7 days.”.

7. Select the Error location as Top of Page

8. Click Save.



Milestone 9 - Profiles

Profiles in Salesforce are fundamental to the platform's security model, defining what users can do within the organization. Profiles control a user's permissions to objects, fields, tabs, apps, and other settings. Each user in Salesforce must be assigned a profile, and the profile assigned to a user determines what they can see and do in the system.

Activity 1: To create an Inventory Manager Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Inventory Manager) >> Save.

The screenshot shows the 'Profiles' page in the Salesforce setup. The left sidebar has 'Profiles' selected. The main area shows a table of profiles. The 'Standard User' row is selected and highlighted with a red box, and the number '9' is written next to it. The table includes columns for Action, Profile Name, User License, and Custom. Other profiles listed include 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', and 'System Administrator'. The number '10' is written next to the 'User License' column header.

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

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	Inventory Manager

Save **Cancel**

2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Medical Inventory Management.

SETUP Profiles

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Medical Inventory Management (Medical_Inventory_Management)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>			

4. Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.

Custom Object Permissions

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

5. Change the password policies as mentioned :
6. User passwords expire in should be “ never expires ”.
7. Minimum password length should be “ 8 ”, and click save.

Password Policies

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

Save **Save & New** **Cancel**

Activity 2: To create an Purchase Manager Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Purchase Manager) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Medical Inventory Management.

SETUP Profiles

Set the permissions and page layouts for this profile.

Profile Edit

Name	Purchase Manager	Save	Save & New	Cancel
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>		
Description				

Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>
Medical Inventory Management (Medical Inventory Management)	<input type="checkbox"/>	<input checked="" type="radio"/>			
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>			

4. Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.

Custom Object Permissions

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

5. Change the password policies as mentioned :
6. User passwords expire in should be “ never expires ”.
7. Minimum password length should be “ 8 ”, and click save.

Password Policies

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

Save **Save & New** **Cancel**

Milestone 10 - Roles

Roles in Salesforce are used to control record-level access and define the hierarchy of an organization, determining the level of visibility and sharing of records among users. Roles work in conjunction with profiles to provide a robust security model. While profiles control what actions users can perform (object and field permissions), roles control which records users can see based on their position in the hierarchy.

Activity 1 : Create a Purchasing Manager Role.

1. Go to quick find >> Search for Roles >> click on Set Up Roles.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Users', the 'Roles' link is highlighted with a red box. At the bottom right of the main content area, there is a red box around the 'Set Up Roles' button. The main content area displays a diagram of a role hierarchy titled 'Understanding Roles'. The hierarchy starts with 'Executive Staff' at the top, followed by 'CEO', 'President', 'CFO', 'VP Sales', and 'Executive Staff'. Below them are 'Western Sales' (with 'Sales Director' and 'Mkt Sales'), 'Eastern Sales' (with 'Sales Director' and 'E.C. Sales'), 'International Sales' (with 'Sales Director' and 'Int'l Sales'), and 'Corporate Staff' (with 'HR Sales Rep' and 'OR Sales Rep'). A note on the left says 'Didn't find what you're looking for? Try using Global Search.' A note at the bottom right says 'Help for this Page' with a link icon.

2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as “Purchasing Manager” and Role name gets auto populated. Then click on Save.

SETUP



Roles

Role Edit
New Role

Role Edit

Label	Purchasing Manager
Role Name	Purchasing_Manager i
This role reports to	SVP, Sales & Marketing 🔍
Role Name as displayed on reports	<input type="text"/>

Save **Save & New** **Cancel**

Activity 2 : Create a Purchasing Manager Role.

1. Go to quick find >> Search for Roles >> click on Set Up Roles.

Setup **Home** **Object Manager** [▼](#)

Q: roles

Users

Roles

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Didn't find what you're looking for? Try using Global Search.

SETUP



Roles

Understanding Roles

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

Sample Role Hierarchy

View other sample Role Hierarchies [Territory-based Sample](#) [▼](#)

Executive Staff

- CEO - President
- CFO - VP, Sales
- Other Executive Staff

* View & edit data, roll up data, generate reports for all users below this level, and access data of other Executive Staff

Western Sales Director

- President of Sales
- Other Western Sales Director
- Other Western Sales Director

* View & edit data, roll up data, generate reports for all users directly below this level, and access data of other users at same level

Eastern Sales Director

- President of E. Sales
- Other Eastern Sales Director
- Other Eastern Sales Director

* View & edit data, roll up data, generate reports only for own data, and access data of other users at same level

International Sales Director

- President of Int'l Sales
- Other International Sales Director
- Other International Sales Director

* View & edit data, roll up data, generate reports only for own data, and access data of other users at same level

Set Up Roles Don't show this page again

2. Click on Expand All and click on add role under SVP, Sales & Marketing role.
3. Give Label as “Inventory Manager” and the Role name gets auto populated. Then click on Save.

The screenshot shows the 'Role Edit' screen under the 'Setup' tab. A red box highlights the 'Label' field containing 'Inventory Manager', the 'Role Name' field containing 'Inventory_Manager', and the 'This role reports to' field containing 'SVP, Sales & Marketing'. Below these fields is a 'Role Name as displayed on reports' input field. At the bottom right are three buttons: 'Save' (highlighted with a red box), 'Save & New', and 'Cancel'.

Milestone 12 - Permission Sets

Permission Sets in Salesforce are a powerful tool to extend user permissions beyond what is defined in their profiles. They allow administrators to grant additional access to various tools and functions without altering the user's profile. Permission sets are particularly useful for providing specialized permissions to specific users without the need to create multiple profiles.

Activity 1 : Create a Permission Set.

1. Go to setup >> type Permission in quick find box >> Select Permission Set >> click on New.

The screenshot shows the 'Permission Sets' page under the 'Setup' tab. A red box highlights the 'Permission Sets' link in the sidebar and the 'New' button at the top left. The main area displays a table of existing permission sets, with the first few rows shown below:

Action	Permission Set Label	Description	License
<input type="checkbox"/>	Buyer	Allows access to the store. Lets users see products and categories, make... Includes all buyer capabilities, and allows access to manage carts and or...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer Manager		
<input type="checkbox"/>	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scale Flow...	Cloud Integration User
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect a...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Admin (Partner Telephony)	Manage Service Cloud Voice contact centers that use your preferred tele...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that use A...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent (Partner Telephony)	Access agent features in Service Cloud Voice contact centers that use yo...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/>	Contact Center Supervisor	Access supervisor features in Service Cloud Voice contact centers that us...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Supervisor (Partner Telephony)	Access supervisor features in Service Cloud Voice contact centers that us...	Service Cloud Voice User (Partner Telephony)
<input type="checkbox"/>	Data Cloud Home Org Integration User	Allows integration user to access entities specific to Remote Data Cloud.	Cloud Integration User
<input type="checkbox"/>	Delivery Estimation Service PermSet		Cloud Integration User
<input type="checkbox"/>	Experience Profile Manager		Salesforce

2. Enter Label as Purchase Manager Create Access >> Click on Save.

Permission Set Create

Enter permission set information

Label: Purchase Manager Create Access
API Name: Purchase_Manager

Description:

Session Activation Required:

Save Cancel

3. From Object Settings >> Select Order Item >> Enable for both Tab Available and Visible >> Enable Read and Create in Object Permissions >> Click on Save.

Permission Set Purchase Manager Create Access

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

Permission Set Overview > Object Settings > Order Items

Order Items Save Cancel

Tab Settings

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

Object Permissions

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

4. Navigate to the Permission Set detail page >> Click Manage Assignments >> Click Add Assignments >> Select the user John PurchaseM to assign the permission set to and click Next.

... > PERMISSION SET 'PURCHASE MANAGER CREATE ACCESS' > MANAGE ASSIGNMENT EXPIRATION

Purchase Manager Create Access

Select Users to Assign

Active Users

1 item selected

Full Name	Alias	Username	Role	Active	Profile
Annapurna Gurram	AGurr	medicalinventory@sb.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00dd0000058bqlua.yrgohck7wjo@chatter.salesforce.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Chatter Free User
Integration User	integ	integration@00dd0000058bqlua.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
John PurchaseM	jpurc	john@purchasem.com	Purchasing Manager	<input checked="" type="checkbox"/>	Purchase Manager
Security User	sec	insightssecurity@00dd0000058bqlua.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Analytics Cloud Security User

Search this list...

Cancel Next

- Select No Expiration date >> Click on Assign.

... > PERMISSION SET 'PURCHASE MANAGER CREATE ACCESS' > MANAGE ASSIGNMENT EXPIRATION

Purchase Manager Create Access

Select an Expiration Option For Assigned Users

No expiration date (i)

Specify the expiration date

1 Day | 1 Week | 30 Days | 60 Days | Custom Date

Time Zone
Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
John PurchaseM	Purchasing Manager	Purchase Manager	✓	Salesforce	Never Expires

Cancel | Back | **Assign**

Milestone 13 - Flows

Flows in Salesforce, part of the Lightning Flow product, are powerful automation tools that help you collect data and perform actions in your Salesforce environment. Flows can be used to automate business processes, guide users through tasks, and integrate with external systems. They are highly versatile and can be configured to meet a wide range of business requirements without the need for custom code.

Activity 1 : Create Flow to update the Actual Delivery Date.

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

New Flow

Select how you'd like to start building your automation.

Start From Scratch
Select your automation type and start building on an empty canvas.

Use a Template
Select a pre-built flow and customize it to fit your needs.

Back | **Next**

- Select the record Triggered flow.Click on create.

New Flow

Core All + Templates

- Screen Flow
- Record-Triggered Flow **2**
- Schedule-Triggered Flow
- Platform Event—Triggered Flow
- Autolaunched Flow (No Trigger)
- Record-Triggered Orchestration

Create

The screenshot shows the 'New Flow' interface. Under the 'Core' tab, there are several flow types listed: 'Screen Flow', 'Record-Triggered Flow', 'Schedule-Triggered Flow', 'Platform Event—Triggered Flow', 'Autolaunched Flow (No Trigger)', and 'Record-Triggered Orchestration'. The 'Record-Triggered Flow' option is highlighted with a red box and a red number '2' to its right, indicating it is the selected template.

- Under Object select “Purchase Order”
- Select A record is created or updated

Configure Start

Select Object

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

* Object **3**

Purchase Order

Configure Trigger

* Trigger the Flow When:

A record is created

A record is updated

A record is created or updated **4**

A record is deleted

The screenshot shows the configuration steps for a flow. It starts with 'Configure Start' where the user selects the 'Object' as 'Purchase Order'. Then it moves to 'Configure Trigger' where the user selects the 'Trigger the Flow When' condition as 'A record is created or updated'. Step 3 is highlighted with a red box around the 'Object' input field, and step 4 is highlighted with a red box around the selected radio button.

- Set Entry Conditions : None
- Select Fast Field Updates and click on Done

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

5

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

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

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

For the first condition select as follows:

Field: Id

Operator: Equals

Value: {!\$Record.Id}

Get Records

* Label 8

* API Name

Description

Get Records of This Object

* Object 9

Filter Purchase Order Records

Condition Requirements **10**

All Conditions Are Met (AND)

Field <input type="text" value="Id"/>	Operator <input type="text" value="Equals"/>	Value <input type="text" value="Aa \$Record > Record ID"/>
---------------------------------------	--	---

+ Add Condition

11. For How many Records to store Select Only the First Record.

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

How Many Records to Store

Only the first record

All records

How to Store Record Data

Automatically store all fields

Choose fields and let Salesforce do the rest

Choose fields and assign variables (advanced)

Select Purchase Order Fields to Store in Variable

Field
ID
Order_Date__c

+ Add Field

13. In the Flow Builder, click on the Manager tab on the left-hand side >> Click on New Resource >> In the Resource Type dropdown, select Variable.

14. Enter API name as ActualDeliveryDate >> Select Data type as Date >> Click on Done.

15. From the Toolbox drag and drop Assignment element.

16. Enter the label as “Assignment”.

17. Set Variable Values:

a) Variable : {!ActualDeliveryDate}

Operator : Equals

Value : {!\$Record.Order_Date__c}

b) Variable : {!ActualDeliveryDate}

Operator : Add

Value : 3

Assignment

* Label	* API Name i	
Assignment	Assignment_1	
Description		
Set Variable Values		
Each variable is modified by the operator and value combination.		
Variable	Operator	Value
ActualDeliveryDate	Equals	\$Record > Order Date
Variable	Operator	Value
ActualDeliveryDate	Add	3
+ Add Assignment		

18. Click Done

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

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

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

22. Set Filter Conditions : None -Always Update Record

23. Set Field Values for the Trip Record as

Field : Actual_Delivery_Date_c

Value : {!ActualDeliveryDate}

Update Records

* How to Find Records to Update and Set Their Values

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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Purchase Order Record

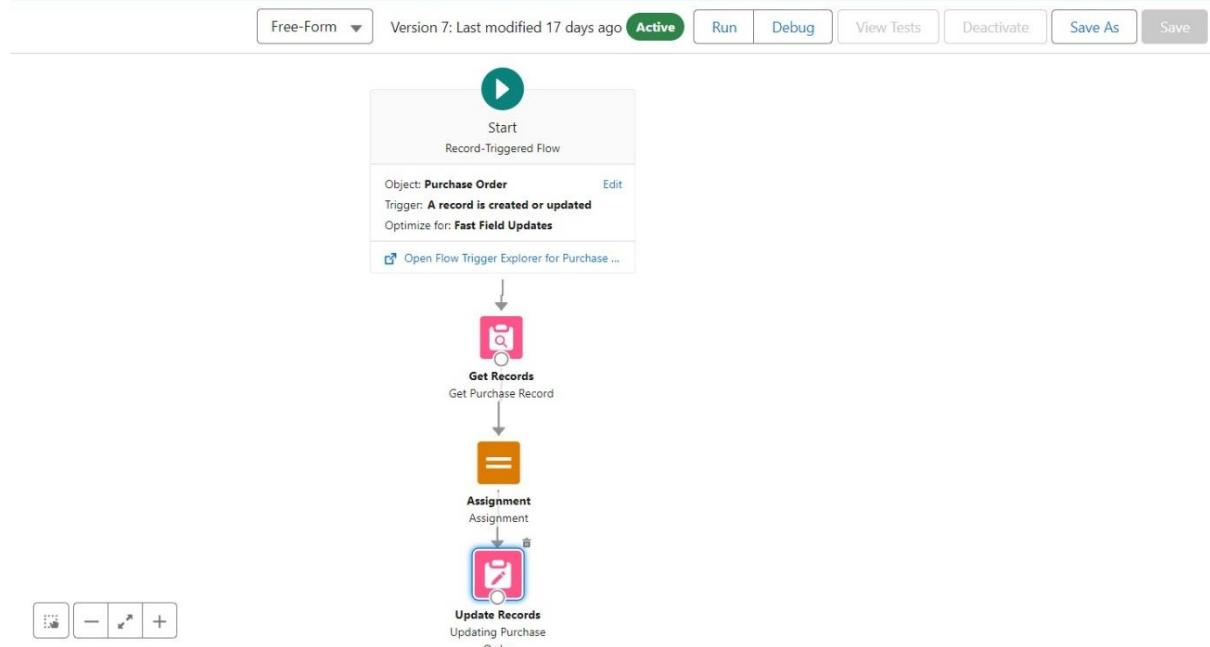
Field	Value
Actual_Delivery_Date__c	ActualDeliveryDate

+ Add Field

24. Click Done

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

26. Activate the flow.



Milestone 14 - Triggers

Triggers in Salesforce are pieces of Apex code that execute before or after specific data manipulation events on Salesforce records, such as insertions, updates, deletions, and undeletions. They are powerful tools for automating complex business logic and ensuring data integrity by enforcing custom validation rules and workflows that cannot be achieved through declarative tools alone.

Activity 1 : Create a Trigger to Calculate total amount on Order Item.

Step 1 : Login to Salesforce:

Log in to your Salesforce account with administrative privileges.

Step 2:

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

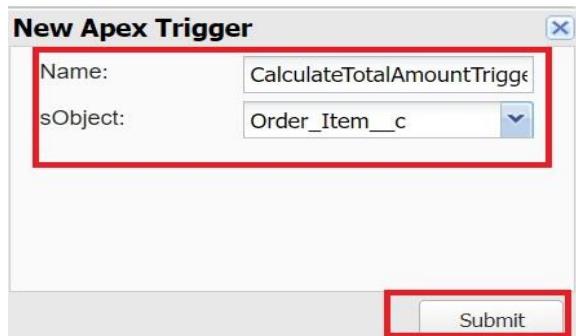
ii)Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

Step 3:

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

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

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



Create an Apex Trigger:

```
trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
```

```
    // Call the handler class to handle the logic
```

```
    CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old, Trigger.isInsert,  
    Trigger.isUpdate, Trigger.isDelete, Trigger.isUndelete);
```

```
}
```

Step 4:

- i) In the Developer Console window, go to the top menu and click on "File".
- ii) Select New: From the dropdown menu under "File", select "New".
- iii) Choose Apex Class: Name it as CalculateTotalAmountHandler

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

```
}
```

```
// Calculate the total amounts for affected Purchase Orders
Map<Id, Decimal> purchaseToUpdateMap = new Map<Id, Decimal>();

if (!parentIds.isEmpty()) {
    // Perform an aggregate query to sum the Amount__c for each Purchase Order
    List<AggregateResult> aggrList = [
        SELECT Purchase_Order_Id__c, SUM(Amount__c) totalAmount
        FROM Order_Item__c
        WHERE Purchase_Order_Id__c IN :parentIds
        GROUP BY Purchase_Order_Id__c
    ];
}

// Map the result to Purchase Order IDs
for (AggregateResult aggr : aggrList) {
    Id purchaseOrderId = (Id)aggr.get('Purchase_Order_Id__c');
    Decimal totalAmount = (Decimal)aggr.get('totalAmount');
    purchaseToUpdateMap.put(purchaseOrderId, totalAmount);
}

// Prepare Purchase Order records for update
List<Purchase_Order__c> purchaseToUpdate = new List<Purchase_Order__c>();
for (Id purchaseOrderId : purchaseToUpdateMap.keySet()) {
    Purchase_Order__c purchaseOrder = new Purchase_Order__c(Id =
    purchaseOrderId, Total_Order_cost__c = purchaseToUpdateMap.get(purchaseOrderId));
    purchaseToUpdate.add(purchaseOrder);
}
```

```

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

```

Save it.

Milestone 15 - Reports

Reports in Salesforce provide a powerful way to visualize and analyze data stored in your Salesforce organization. They allow users to create, customize, and share different types of reports based on data from standard and custom objects. Reports help organizations make informed decisions by providing insights into key metrics, trends, and performance indicators.

Activity 1: Create a Purchase Orders based on Suppliers(Summary) Report

1. Click App Launcher
2. Select Medical Inventory Management App
3. Click on Reports tab
4. Click on New Report.
5. Click the report type as Purchase Orders Click Start report.

6. Click on Filters and select as follows and click on Apply

Outline **Filters**

Filters ▼

Add filter... 🔍

Show Me
All purchase orders

Actual Delivery Date
All Time

7. Customize your report, in group rows select – Supplier ID, Purchase Order: Purchase Order ID, for columns Order Count, Total Order Cost (In this way we are making a Summary Report).

8. Click save and run

9. Give report name – Purchase Orders based on Suppliers.

10. Click Save

NOTE: In this report you can see your all record of the object you selected for reporting (What you selects in “Select a report type option”)

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
Supplier-001 (4)	Purchase-0001 (1) Purchase-0002 (1) Purchase-0003 (1) Purchase-0004 (1)	3 2 3 4	₹2,075.00 ₹3,250.00 ₹7,000.00 ₹9,500.00
Supplier-002 (1)	Purchase-0005 (1)	2	₹4,500.00
Total (5)		14	₹26,325.00

View Report

1. Click on App Launcher on the left side of the screen.
2. Search Medical Inventory Management App & click on it.
3. Click on Reports Tab.

- Click on Purchase Orders based on Suppliers and see records.

The screenshot shows a report interface with the following details:

Report Summary:

Total Records	Total Order Count	Total Total Order Cost
5	14	₹26,325.00

Detailed Purchase Orders:

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
Supplier-001 (4)	Purchase-0001 (1)	3	₹2,075.00
	Purchase-0002 (1)	2	₹3,250.00
	Purchase-0003 (1)	3	₹7,000.00
	Purchase-0004 (1)	4	₹9,500.00
Supplier-002 (1)	Purchase-0005 (1)	2	₹4,500.00
Total (5)		14	₹26,325.00

At the bottom, there are filter controls: Row Counts, Detail Rows, Subtotals, and Grand Total.

Activity 2: Create a Complete Purchase Details Report

- Click App Launcher
- Select Medical Inventory Management App
- Click on Reports tab
- Click on New Report.
- Click the report type as Purchase Orders with Order Items and Product ID >> Click Start report.
- Click on Filters and select as follows and click on Apply

The 'Filters' section is active, showing the following settings:

- Filters** button (highlighted with a red box)
- Add filter...** button
- Show Me** dropdown menu:
 - All purchase orders (highlighted with a red box)
- Actual Delivery Date** dropdown menu:
 - All Time (highlighted with a red box)

- Customize your report, in group rows select – Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, for columns Product ID : Product ID, Product ID : Product Name, Order Count, Quantity Received, Amount (In this way we are making a Summary Report).

8. Click save and run

9. Give report name – Complete Purchase Details Report

10. Click Save

The screenshot shows the 'Medical Inventory' application interface with the 'Purchase Orders with Order Items and Product ID' report open. The report displays a list of purchase orders with their details. The left sidebar includes 'Fields' and 'Filters' sections, with 'Groups' and 'Columns' sections highlighted by red boxes. The main area shows a table with columns: Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, Product ID: Product ID, Order Count, Product ID: Product Name, Quantity Received, and Amount. The table data is as follows:

Supplier ID	Actual Delivery Date	Purchase Order: Purchase Order ID	Product ID: Product ID	Order Count	Product ID: Product Name	Quantity Received	Amount
Supplier-001 (12)	18/06/2024 (2)	Purchase-0002 (2)	Gen-0001	2	Syringes	50	₹250.00
			Cap-0001	2	Dolo 650	150	₹3,000.00
				2		200	₹3,250.00
Supplier-001 (12)	22/06/2024 (3)	Purchase-0001 (3)	Gen-0001	3	Syringes	5	₹25.00
			Gen-0001	3	Syringes	10	₹50.00
			Cap-0001	3	Dolo 650	100	₹2,000.00
Supplier-001 (12)	23/06/2024 (3)	Purchase-0003 (3)		3		115	₹2,075.00
				3		115	₹2,075.00
				3	Calpol 120mg Syrup	100	₹4,000.00
Supplier-001 (12)	23/06/2024 (3)	Purchase-0003 (3)	Cap-0001	3	Dolo 650	50	₹1,000.00
			Gen-0001	3	Syringes	400	₹2,000.00
				3		550	₹7,000.00
Supplier-001 (12)	11/07/2024 (4)	Purchase-0004 (4)		3		550	₹7,000.00
				3		550	₹7,000.00
				4	Calpol 120mg Syrup	100	₹4,000.00
	4	Saline	50	₹2,500.00			
	4	Dolo 650	100	₹2,000.00			
	4	Syringes	300	₹1,000.00			

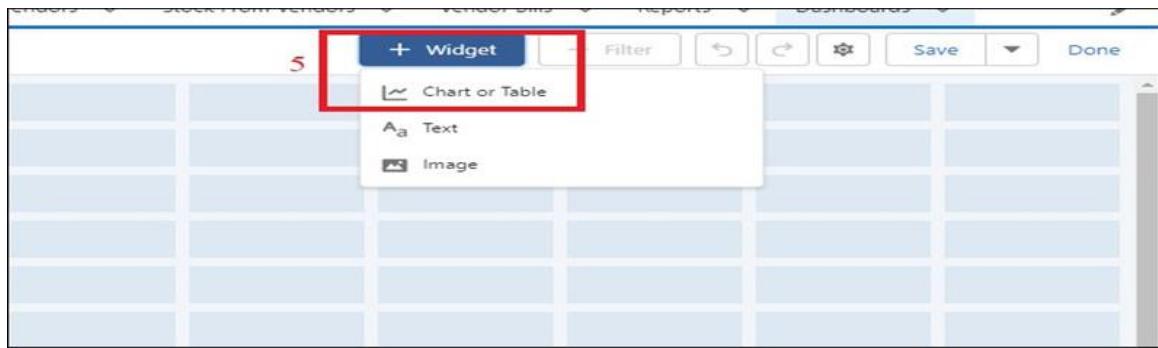
At the bottom, there are buttons for Row Counts, Detail Rows, Subtotals, Grand Total, Add Chart, Save & Run, Save, Close, and Run.

Milestone 16 - Dashboards

Dashboards in Salesforce are dynamic visual representations of key metrics and data from reports, providing a consolidated view of organizational performance and trends. They are powerful tools for monitoring real-time data, tracking progress towards goals, and gaining actionable insights at a glance. Dashboards consist of components such as charts, tables, metrics, and gauges that display data from underlying reports.

Activity 1: - Create Dashboard

1. Click on the Dashboards tab from the Medical Inventory Management application.
 2. Click on the new dashboard.
 3. Give name - Medical Inventory DashBoard
 4. Click create
 5. Click on +widget
 6. Select the Purchase Orders based on Suppliers Report
 7. For the data visualization select any of the charts, tables etc. as per your choice/requirement
 8. Click add.
 9. Click save.



Select Report

Reports

- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports

Folders

- Created by Me
- Shared with Me

All Folders

Select Report

Reports and Folders ▾

All Folders > Private Reports

Complete Purchase Details Report
Annapurna Gurram - 08-Jul-2024, 11:58 am - Private Reports

Purchase Orders based on Suppliers
Annapurna Gurram - 08-Jul-2024, 11:32 am - Private Reports

Cancel
Select

Add Widget

Report

Purchase Orders based on Supplie X

Use chart settings from report i

Display As

Value

Sum of Total Order Cost

Sliced By

Supplier ID

Display Units

Preview

Purchase Orders based on Suppliers

Sum of Total Order Cost

Supplier ID

Supplier-001	
Supplier-002	

View Report (Purchase Orders based on Suppliers)

Cancel
Add

Add Widget

Title
Purchase Orders based on Suppliers

Subtitle

Footer

Legend Position
Right

Widget Theme
 Light (Dashboard default)

 Dark

Preview

Purchase Orders based on Suppliers

Sum of Total Order Cost

Supplier ID
Supplier-001
Supplier-002

View Report (Purchase Orders based on Suppliers)

[Cancel](#) [Add](#)

Activity 2: View Dashboard

1. Click on App Launcher on the left side of the screen.
2. Search Medical Inventory Management & click on it.
3. Click on Dashboard Tab.
4. Click on Medical Inventory DashBoard see graph view of records

