

PROJECT TITLE:

Medical Inventory Management

College Name:

Sri Vasavi College Self Finance Wing, Erode

College Code: bru17

Team ID: NM2025TMID23315

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Medical Inventory Management Project Documentation

1. Project Overview

The **Medical Inventory Management System** is a Salesforce application designed to streamline the process of managing medical inventory. It helps track suppliers, products, purchase orders, order items, and inventory transactions in a single platform.

This system improves:

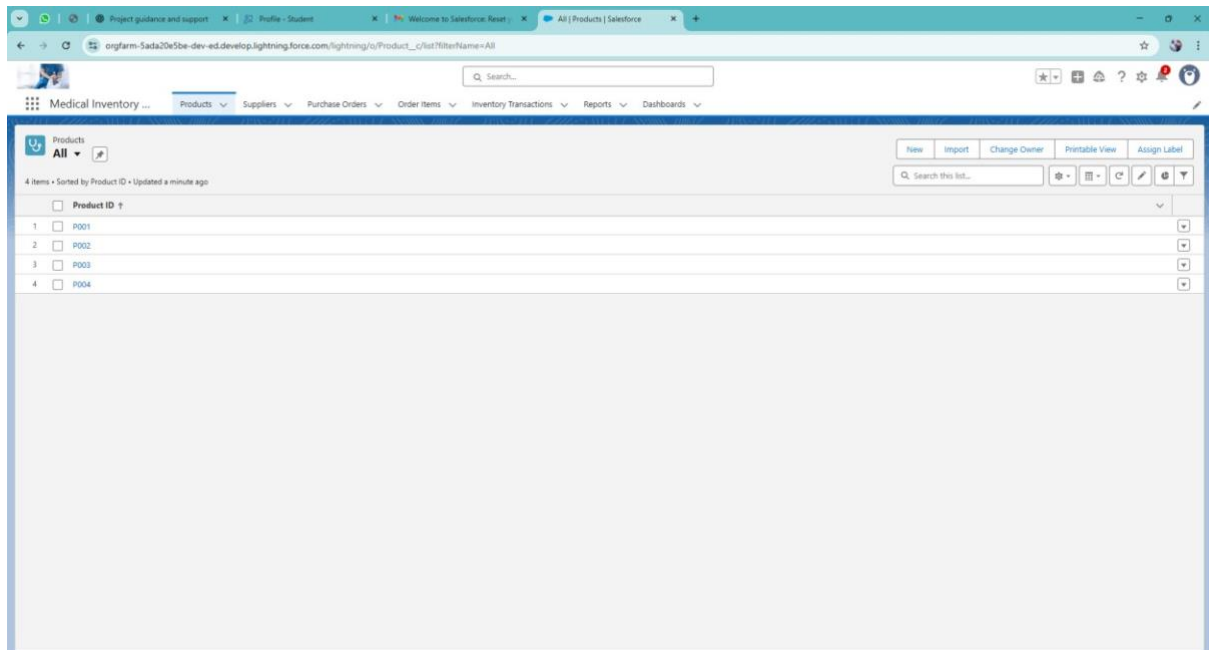
- Supplier tracking
- Stock level monitoring
- Order management
- Expiry date tracking
- Report generation and analytics

2. Objectives

The main objectives of this project are:

1. To efficiently manage and track **medical products** and their **stock levels**.
2. To streamline the **purchase order process** by linking suppliers and products.
3. To ensure **real-time monitoring** of stock and expiry dates.
4. To generate **insightful reports and dashboards** for decision-making.
5. To automate repetitive tasks using Salesforce tools like **flows and validation rules**.

Medical Inventory Management App.



3. Created a developer org in salesforce.

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

Sign up for your Developer Edition
A free Salesforce Platform environment with Agentforce and Data Cloud

First name: Dharani ✓ Last name: C ✓

Job title: Developer ✓ Work email: dharanic897328@gmail.com ✓

Company: Sri Vasavi College ✓ Country/Region: India ✓

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud infrastructure.

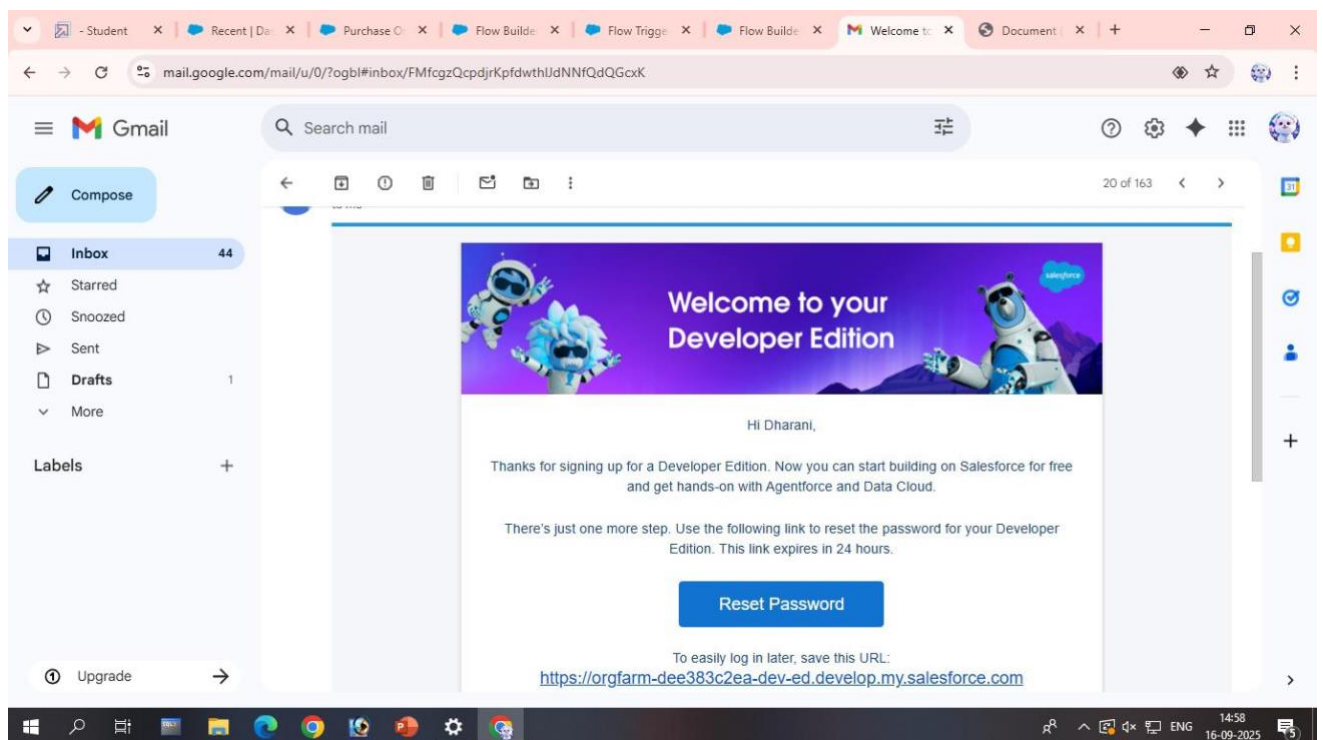
☒ I agree to the Main Services Agreement – Developer Services and Salesforce Program Agreement. I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code

Click on sign me up after filling these.

4.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.com**.
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

..... Good

* Confirm New Password

..... Match

Security Question

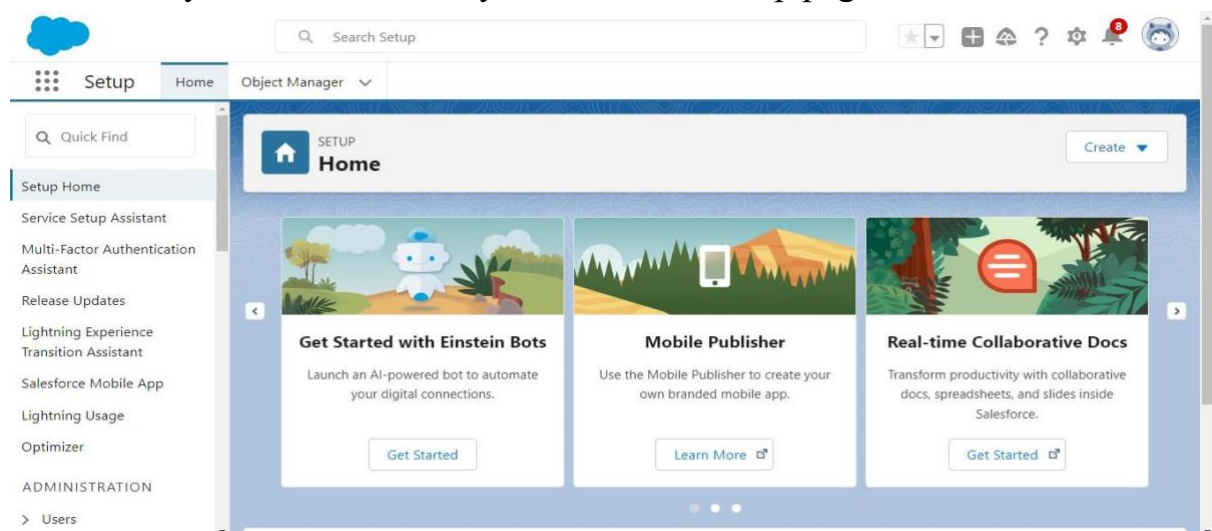
▼ In what city were you born?

* Answer

asdfghjkl

Change Password

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



5. Objects Created

The following **custom objects** were created to manage the system:

Object Name **Purpose**

To store supplier details like name, contact person, phone, **Supplier** and address.

Object Name **Purpose**

Product To store product information like unit price, current stock level, and minimum stock level.

Purchase Order To record order details from suppliers.

Order Item To link products with each purchase order and track quantities and costs.

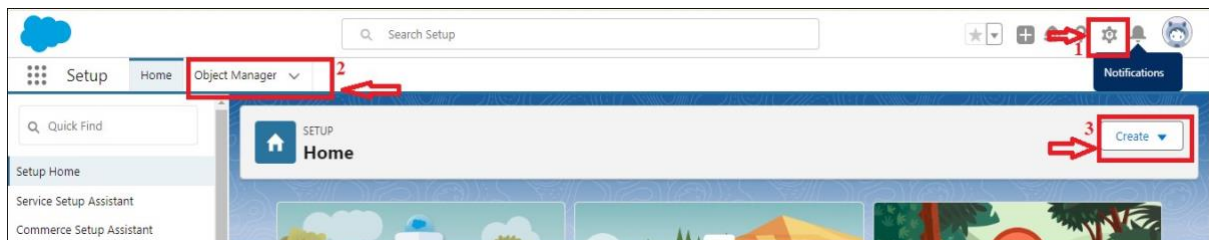
Inventory

Transaction To track stock movement (Inbound/Outbound).

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

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 Save Save & New Cancel

Custom Object Information Required Information

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

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

Deployment Status What is this?

☐ In Development ☒ 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)

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

10 Save Save & New Cancel

Activate Windows
Go to Settings to activate Windows.

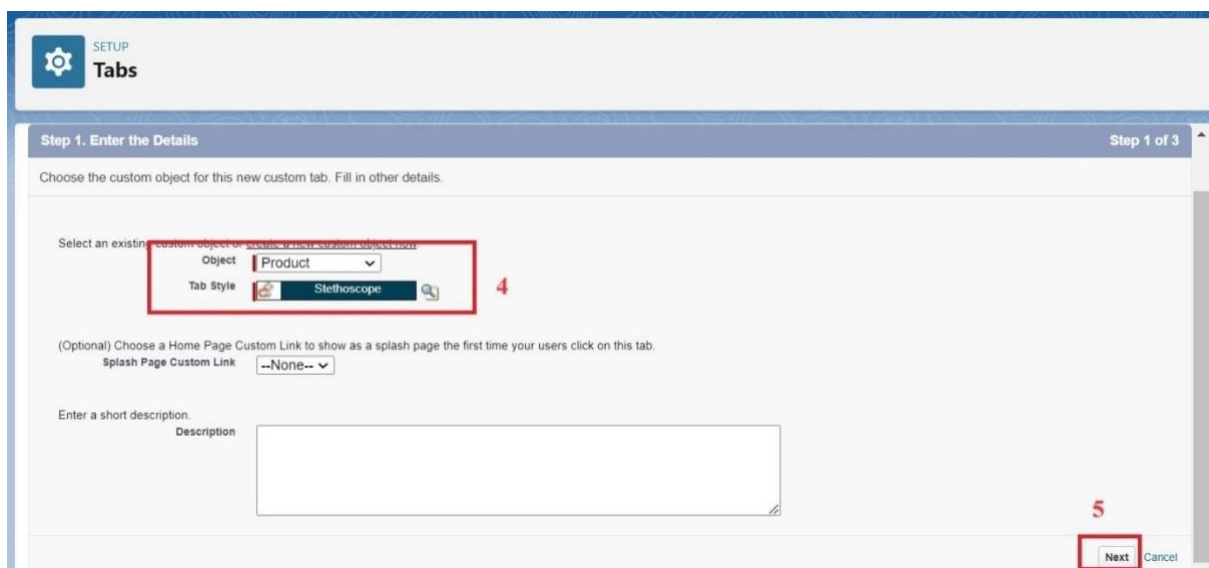
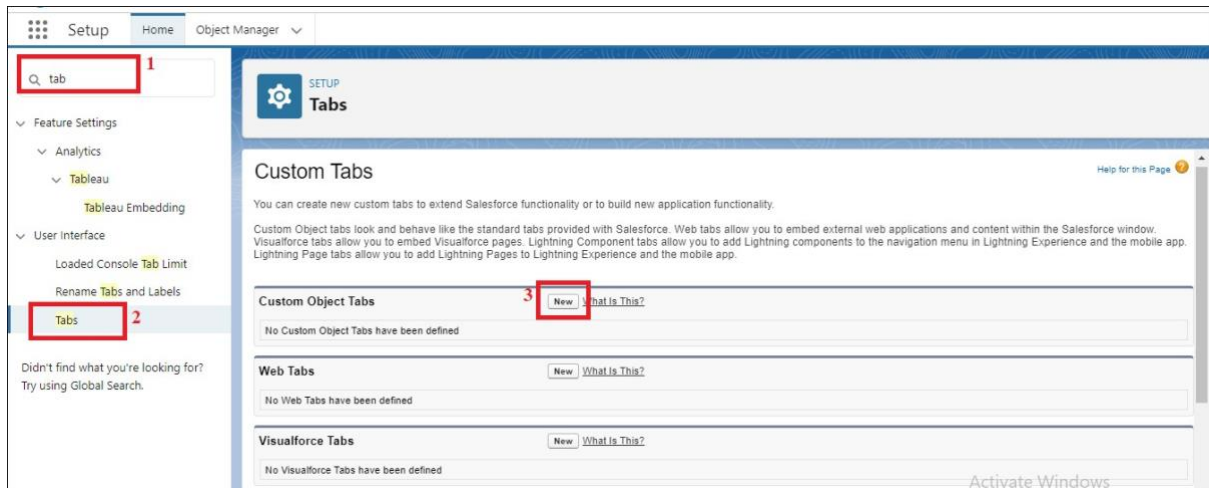
In the same way Created Purchase Order, Order Item, Inventory Transaction and Supplier objects.

6.Tabs Created

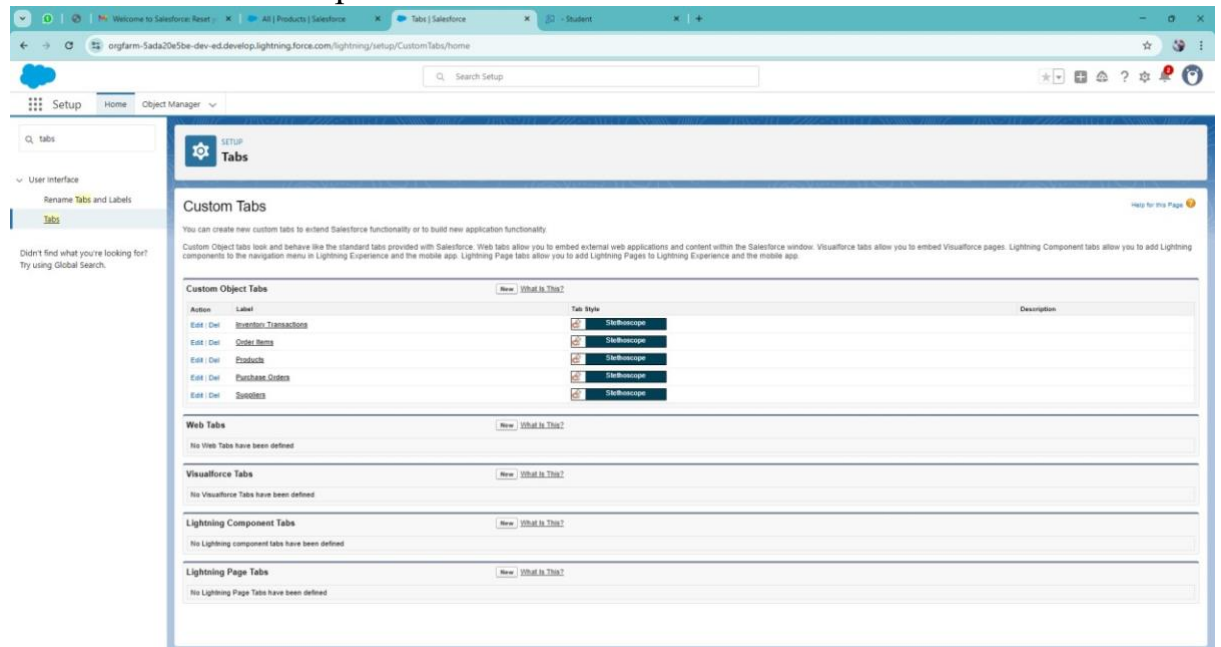
In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

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



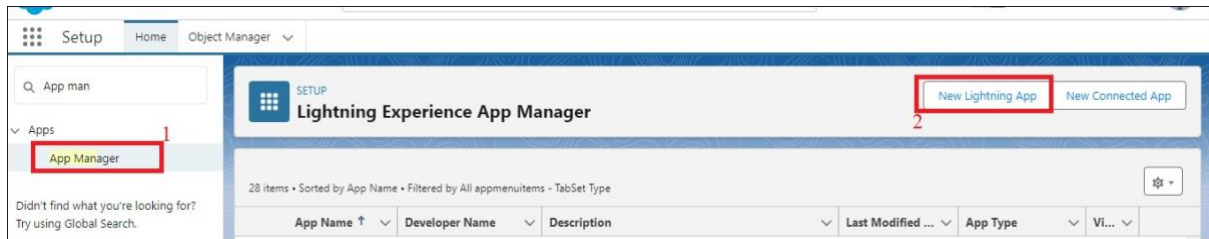
1. Now created the Tabs for the remaining Objects, they are “Purchase Order, Order Item, Inventory Transaction, Supplier”.
2. Followed the same steps as mentioned in above.



7.Created 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

3 *App Name 1
Medical Inventory Management

*Developer Name 1
Medical_Inventory_Management

Description 1
Enter a description...

App Branding

Image 1 3


Primary Color Hex Value 1
#0070D2

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.

Available Items

Create

Dash

Dashboards

Selected Items

Products

Purchase Orders

Order Items

Inventory Transactions

Suppliers

Reports

6

New Lightning App

User Profiles

Choose the user profiles that can access this app.

7

Available Profiles

system

System Administrator

Selected Profiles

8

Back

Save & Finish

8.Created a Text Field in Product 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 Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager' (highlighted with a red box and labeled '2'). The 'Object Manager' page displays a list of objects. The 'Product' object is highlighted with a red box and labeled with a red '3'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Fulfillment Order Product	FulfillmentOrderLineItem	Standard Object			
Opportunity Product	OpportunityLineItem	Standard Object			
Order Product	OrderItem	Standard Object			
Product	Product__c	Custom Object		18/06/2024	✓
Product	Product2	Standard Object			
Product Attribute	ProductAttribute	Standard Object			

The screenshot shows the Salesforce Setup interface for the 'Product' object. The left navigation pane includes 'Details' and 'Fields & Relationships' (highlighted with a red box and labeled '4'). The 'Fields & Relationships' page displays a list of fields. The 'New' button is highlighted with a red box and labeled with a red '5'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Product ID	Name	Text(80)		✓

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

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.

☐ Geolocation

☐ Number

☐ Percent

☐ Phone

☐ Picklist

☐ Picklist (Multi-Select)

☒ Text **6**

☐ Text Area

☐ Text Area (Long)

☐ Text Area (Rich)

☐ Text (Encrypted) **i**

☐ Time

☐ URL

Next Cancel

Step 2. Enter the details

Step 2 of 4

Previous **Next** Cancel

Field Label **Product Name** **i** **7**

Please enter the maximum length for a text field below.

Length **255**

Field Name **Product** **i** **7**

Description

Help Text **i**

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**

9

Field Added in Object:

Object	Field Name	Data Type
Product	Product ID(Standard)	Text
	Product Name	Text
	Product Description	Text Area
	Minimum Stock Level	Number(18, 0)
	Current Stock Level	Number(18, 0)
	Unit Price	Currency(16, 2)

	Expiry Date	Date
--	-------------	------

Purchase Order	Purchase Order ID(Standard)	Text
	Supplier ID	Lookup(Supplier)
	Order Date	Date
	Expected Delivery Date	Date
	Actual Delivery Date	Date
	Order Count	Roll-Up Summary (COUNT Order Item)
	Total Order Cost	Currency(16, 2)
Order Item	Order Item ID(Standard)	Text
	Product ID	Lookup(Product)
	Purchase Order ID	Master-Detail(Purchase Order)
	Quantity Ordered	Number(18, 0)
	Quantity Received	Number(18, 0)
	Unit Price	Formula(Currency)
	Amount	Formula(Currency)
Inventory Transaction	Transaction ID(Standard)	Text
	Purchase Order ID	Lookup(Purchase Order)

Supplier	Transaction Date	Date
	Transaction Type	Picklist
	Total Order Cost	Formula(Currency)
	Supplier ID(Standard)	Text

	Supplier Name	Text
	Contact Person	Text
	Phone Number	Phone
	Email	Email
	Address	TextArea

9.Edited 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.

9.1 Edited a Page Layout in Purchase Order Object

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	Expected Delivery...	Owner
Blank Space	Last Modified By	Purchase Order ID
Actual Delivery Date	Order Count	Supplier ID
Created By	Order Date	Total Order Cost

Information (Header visible on edit only)

★ Purchase Order ID Sample Text	Actual Delivery Date 07/07/2024
★ Supplier ID Sample Text	Order Count 36,243
★ Order Date 07/07/2024	Total Order Cost ₹123.45
Expected Delivery Date 07/07/2024	Owner Sample Text

System Information (Header visible on edit only)

Created By Sample Text Last Modified By Sample Text

9.2 Edited a Page Layout in Order Item Object

SETUP > OBJECT MANAGER

Order Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

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

Quick Find Field Name

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Section

Blank Space

Amount

Created By

Last Modified By

Order Item ID

Product ID

Purchase Order ID

Quantity Ordered

Quantity Received

Unit Price

Information (Header visible on edit only)

Order Item ID Sample Text

Amount ₹123.45

Purchase Order ID Sample Text

Product details

Product ID Sample Text

Unit Price ₹123.45

Quantity Ordered 23,712

Quantity Received 33,407

System information (Header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

Custom Links (Header visible on edit only)

9.3 Edited a Page Layout in Inventory Transaction Object

SETUP > OBJECT MANAGER

Inventory Transaction

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

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

Quick Find Field Name

Fields

Buttons

Quick Actions

Mobile & Lightning Actions

Expanded Lookups

Related Lists

Report Charts

Section

Blank Space

Owner

Purchase Order ID

Created By

Last Modified By

Transaction ID

Transaction Type

Total Order Cost

Transaction Date

Information (Header visible on edit only)

Transaction ID Sample Text

Purchase Order ID Sample Text

Transaction Type Sample Text

Transaction Date 07/07/2024

Total Order Cost ₹123.45

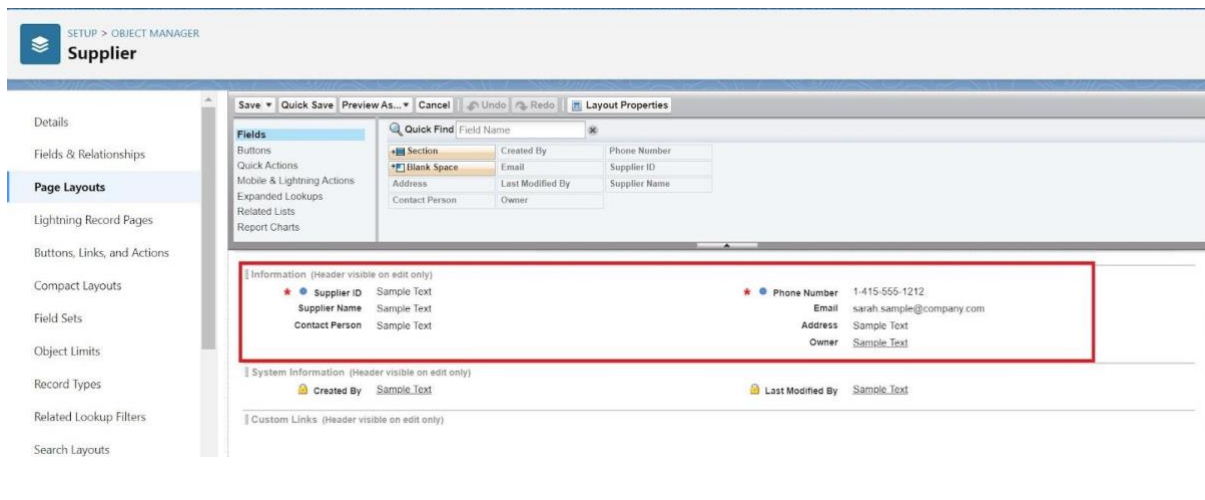
Owner Sample Text

System information (Header visible on edit only)

Created By Sample Text

Last Modified By Sample Text

9.4 Edited a Page Layout in Supplier Object



10. Created 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.

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

Compact Layouts

1 item, sorted by label

LABEL	API NAME	PRIMARY	MODIFIED BY	LAST MODIFIED
System Default	SYSTEM	✓		

Enter Compact Layout Information

Label

Product Compact Layout

Name

Product_Compact_Layout

Select Compact Layout Fields

Available Fields

Created By

Last Modified By

Minimum Stock Level

Owner

Product ID

Add

Remove

Selected Fields

Product Name

Unit Price

Current Stock Level

Top

Up

Down

Bottom

Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.

Save

Cancel

Product Compact Layouts

Compact Layout Assignment

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:

Product Compact Layout

Save

Cancel

10.1 Created a Compact Layout to a Purchase Order Object

The screenshot shows the 'Compact Layout Edit' window. At the top, there are 'Save' and 'Cancel' buttons. Below is the 'Enter Compact Layout Information' section with a red box around the 'Label' field containing 'Purchase Order Compact L' (marked with a red '4') and the 'Name' field containing 'Purchase_Order_Compact'. The main section is 'Select Compact Layout Fields', which is also enclosed in a red box (marked with a red '5'). It contains two lists: 'Available Fields' (Actual Delivery Date, Created By, Expected Delivery Date, Last Modified By, Owner, Order Count) and 'Selected Fields' (Purchase Order ID, Order Date, Total Order Cost, Supplier ID). Between these lists are 'Add' and 'Remove' buttons. To the right of the 'Selected Fields' list are buttons for 'Top', 'Up', 'Down', and 'Bottom'. At the bottom of the window, there is a red box around the 'Save' button (marked with a red '6') and a 'Cancel' button. A small note at the bottom reads: 'Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.'

Purchase Order Compact Layouts

Compact Layout Assignment

The screenshot shows the 'Compact Layout Assignment' window. At the top, there are 'Save' and 'Cancel' buttons, with a red box around the 'Save' button (marked with a red '10'). Below is the 'Primary Compact Layout' section. It contains the text: 'Select the compact layout to use when this object's records appear as list items in the mobile app.' Below this text is a red box around the 'Primary Compact Layout:' dropdown menu, which currently shows 'Purchase Order Compact Layout' (marked with a red '9'). At the bottom, there are 'Save' and 'Cancel' buttons.

11.Create an Expected Delivery Date Validation rule 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 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 :
(Expected_Delivery_Date__c - Order_Date__c)> 7

Purchase Order Validation Rule Help for this Page

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 Save Save & New Cancel

Rule Name: 3

Active: ☒ 4

Description:

Error Condition Formula Required Information

Example: [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

5

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

Quick Tips
 • [Operators & Functions](#)

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.

Error Message

Example:

This message will appear when Error Condition formula is **true**

Error Message: 6

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

Error Location: ☒ Top of Page ☐ Field 7

8 Save Save & New Cancel

12.Created an Inventory Manager Profile

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 ☐

Require a minimum 1 day password lifetime ☐

Don't immediately expire links in forgot password emails ☐ ⓘ

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

12.1 Created an Purchase Manager Profile

SETUP Profiles

Set the permissions and page layouts for this profile.

Profile Edit **Save** **Save & New** **Cancel**

Name **Purchase Manager**

User License **Salesforce**

Description

Custom Profile ☒

Custom App Settings ⓘ Required Information

	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 checked="" 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"/>			

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 ☐

Require a minimum 1 day password lifetime ☐

Don't immediately expire links in forgot password emails ☐ 

Save Save & New Cancel

13.Created a Purchasing Manager Role.

Setup Home Object Manager ▼

roles

Users

Roles

Feature Settings

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.


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** ▼



Set Up Roles

☐ Don't show this page again



SETUP
Roles

Role Edit
 New Role

Role Edit

Label

Purchasing Manager

Role Name

Purchasing_Manager

This role reports to

SVP, Sales & Marketing

Role Name as displayed on reports

Save

Save & New

Cancel

13.1 Created a Inventory Manager Role.

Setup Home Object Manager

Q roles

Users

Roles

Feature Settings

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

Help for this Page

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



Set Up Roles

Don't show this page again



SETUP
Roles

Role Edit
New Role

Role Edit

Label

Role Name

This role reports to

Role Name as displayed on reports

Save

Save & New

Cancel

14.Created a Permission Set.

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

Setup Home Object Manager

Users
 Permission Set Groups
Permission Sets
 Custom Code
 Custom Permissions

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

SETUP
Permission Sets

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

All Permission Sets Edit Delete Create New View

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

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

SETUP
Permission Sets

Permission Set
Create

Enter permission set information

Label **Purchase Manager Create Access**

API Name **Purchase_Manager**

Description

Session Activation Required ☐

Save **Cancel**

Required Information

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

SETUP
Permission Sets

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"/>

- 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

Search this list...

	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Annapurna Gurram	AGurram	medicalinventory@sb.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00dd10000058bqluaa.yrgohck7wjvo@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00dd10000058bqluaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input checked="" type="checkbox"/>	John PurchaseM	jpurc	john@purchasem.com	Purchasing Manager	<input checked="" type="checkbox"/>	Purchase Manager
<input type="checkbox"/>	Security User	sec	insightssecurity@00dd10000058bqluaa.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Cancel Next

5. 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 ⓘ

☐ Specify the expiration date

1 Day 1 Week 30 Days 60 Days Custom Date

Time Zone
Select a time zone...

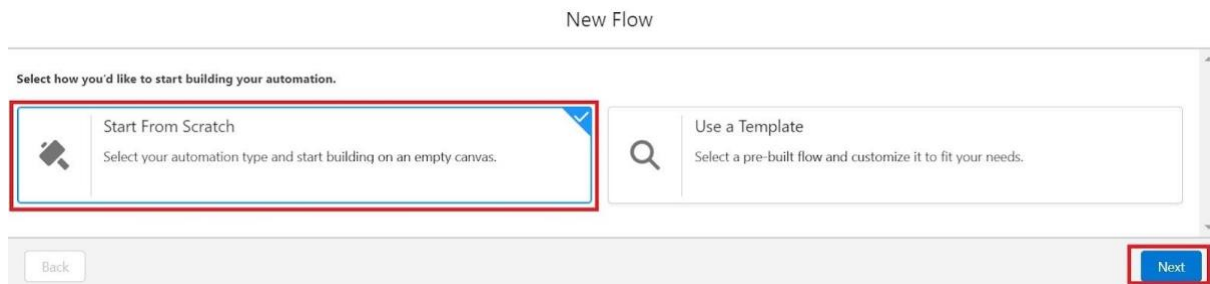
Selected Users

Full Name	Role	Profile	Active	User License	Expires On
John PurchaseM	Purchasing Manager	Purchase Manager	<input checked="" type="checkbox"/>	Salesforce	Never Expires

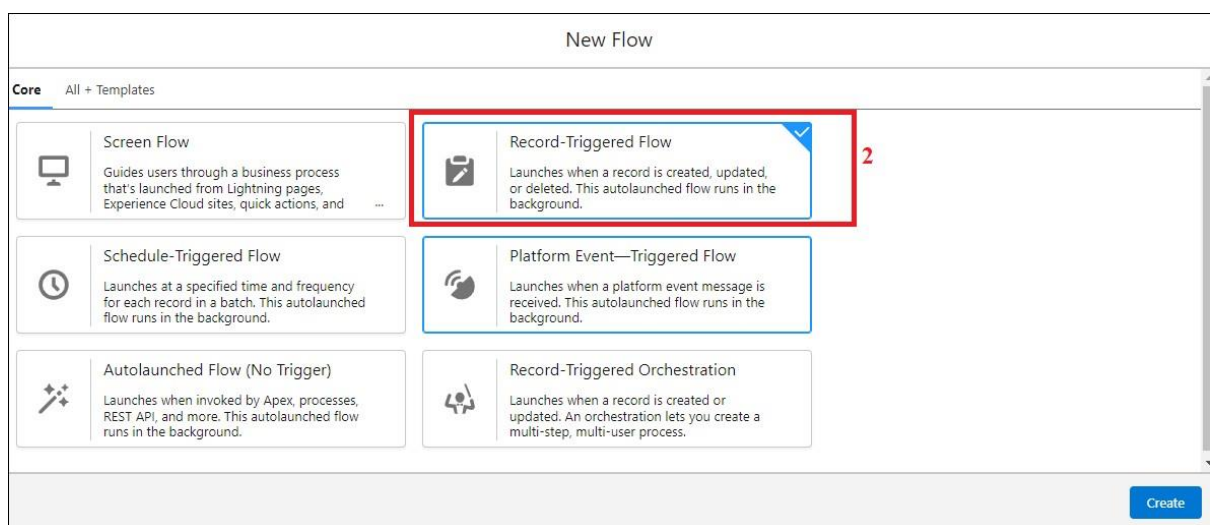
Cancel Back Assign

15.Created Flow to update the Actual Delivery Date.

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

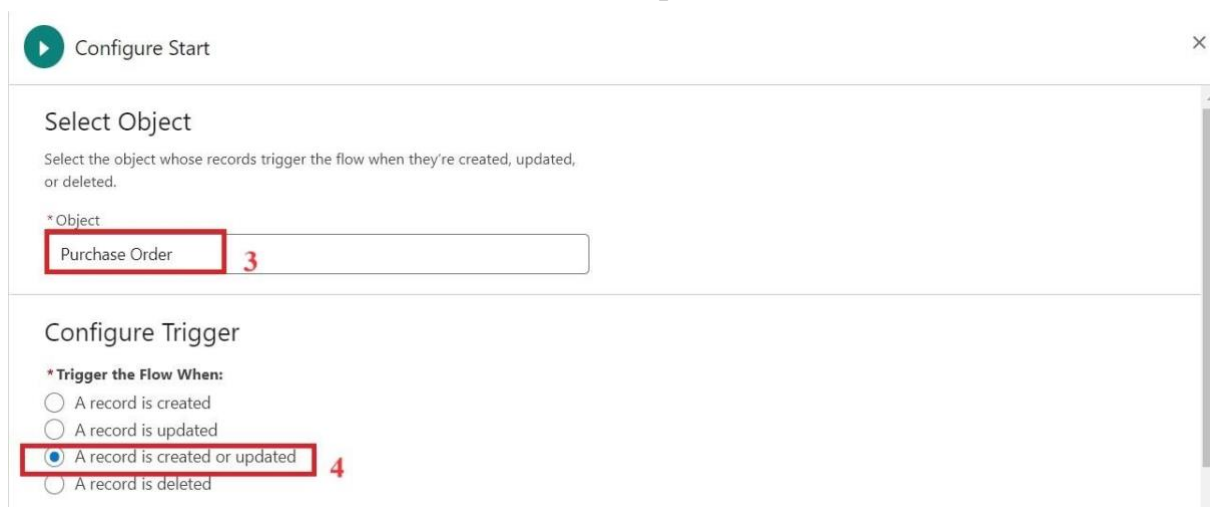


2. Select the record Triggered flow. Click on create.



3. Under Object select “Purchase Order”

4. Select A record is created or updated



5. Set Entry Conditions : None
6. 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

None ▼

5

*Optimize the Flow for:

<p>Fast Field Updates</p> <p>Update fields on the record that triggers the flow to run. This high-performance flow runs <i>before</i> the record is saved to the database.</p>	<p>Actions and Related Records</p> <p>Update any record and perform actions, like send an email. This more flexible flow runs <i>after</i> the record is saved to the database.</p>
---	--

6

☐ 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: **Get Purchase Record** **8** * API Name: **Get_Purchase_Record**

Description:

Get Records of This Object

* Object: **Purchase Order** **9**

Filter Purchase Order Records **10**

Condition Requirements: All Conditions Are Met (AND)

Field	Operator	Value
Id	Equals	\$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

☒ 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 [Close]

* Label: Assignment [Field]
* API Name: Assignment_1 [Field]

Description: [Text Area]

Set Variable Values
Each variable is modified by the operator and value combination.

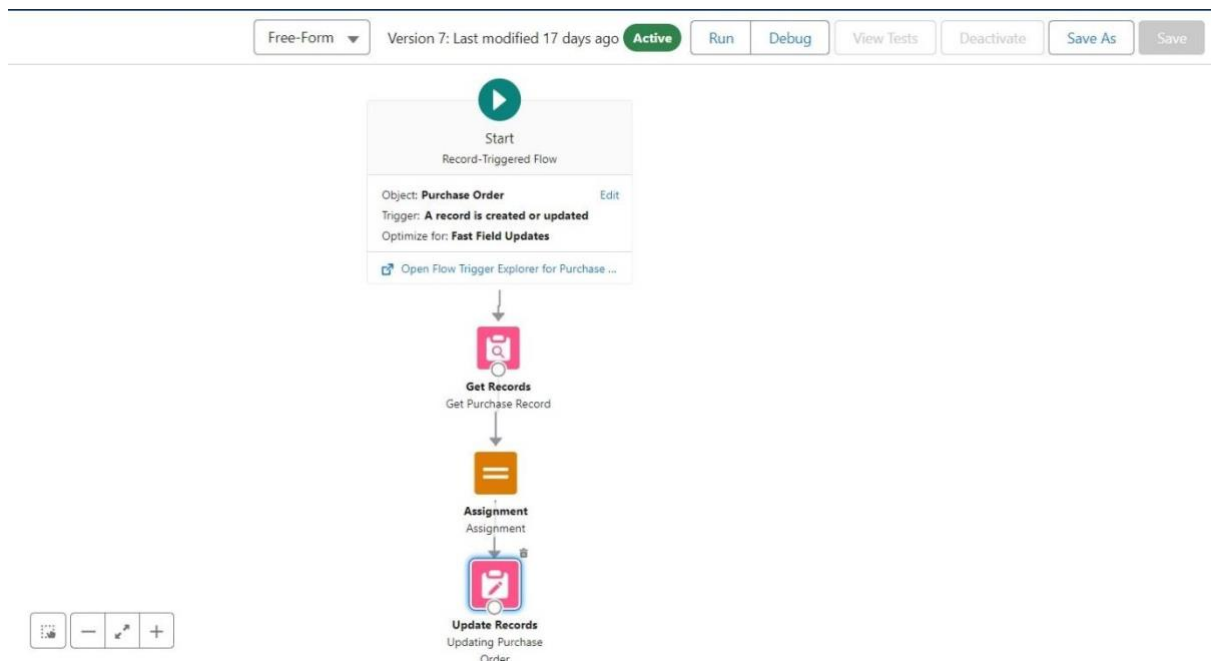
Variable	Operator	Value	
ActualDeliveryDate [X]	Equals [Dropdown]	\$Record > Order Date [X]	[Trash]
ActualDeliveryDate [X]	Add [Dropdown]	3 [Field]	[Trash]

+ 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

Value : {!ActualDeliveryDate}

24. Click Done
25. Save the flow as “Actual Delivery Date Updating”.
26. Activate the flow.



16.Created 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.

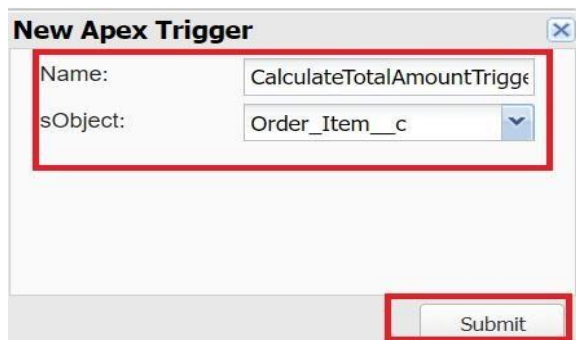
ii)Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

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.



The screenshot shows the 'New Apex Trigger' dialog box. The 'Name' field contains 'CalculateTotalAmountTrigg' and the 'sObject' dropdown is set to 'Order_Item__c'. A red box highlights these fields. The 'Submit' button is at the bottom right, also highlighted with a red box.

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;

    }

    }

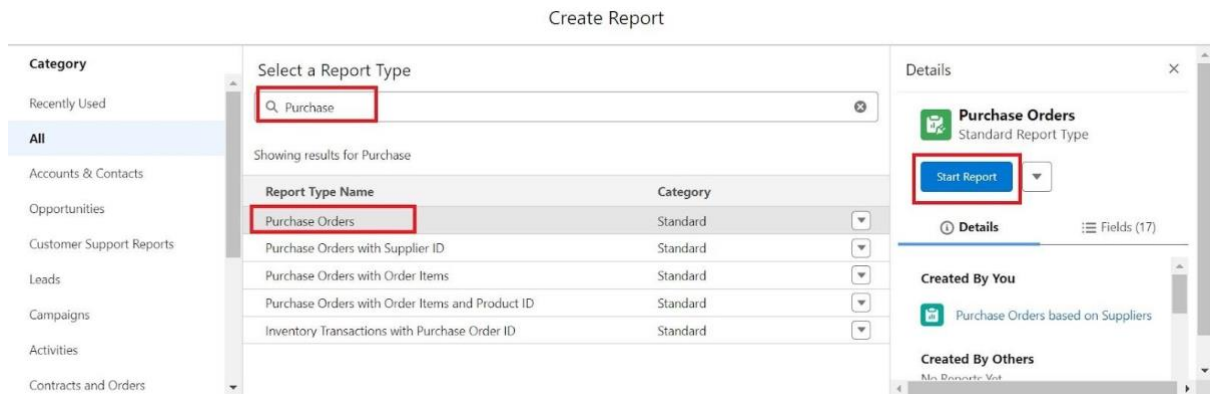
}
}

```

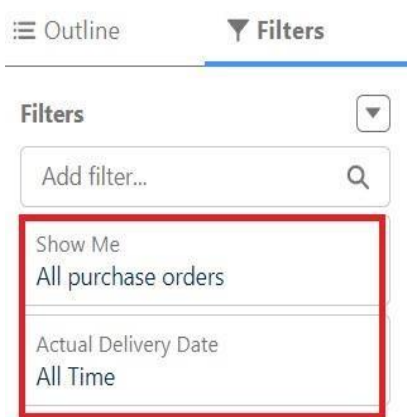
Save all.

17.Created 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



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).

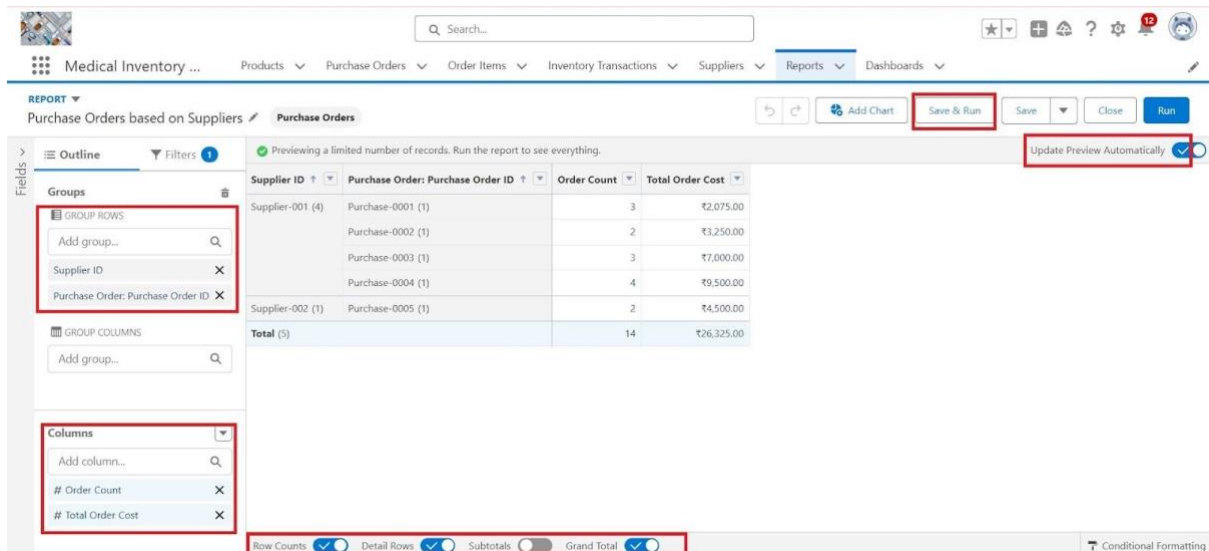
8. Click save and run

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”)



View Report

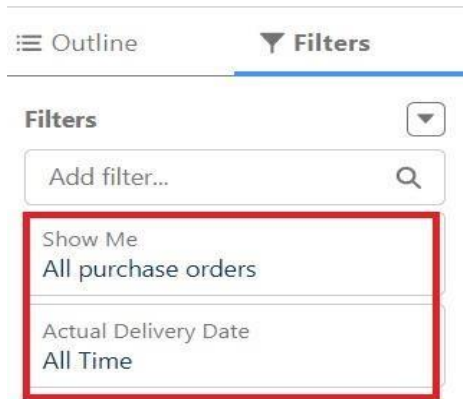
1. Click on App Launcher on the left side of the screen.
2. Search Medical Inventory Management App & click on it.
3. Click on Reports Tab.
4. Click on Purchase Orders based on Suppliers and see records.

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

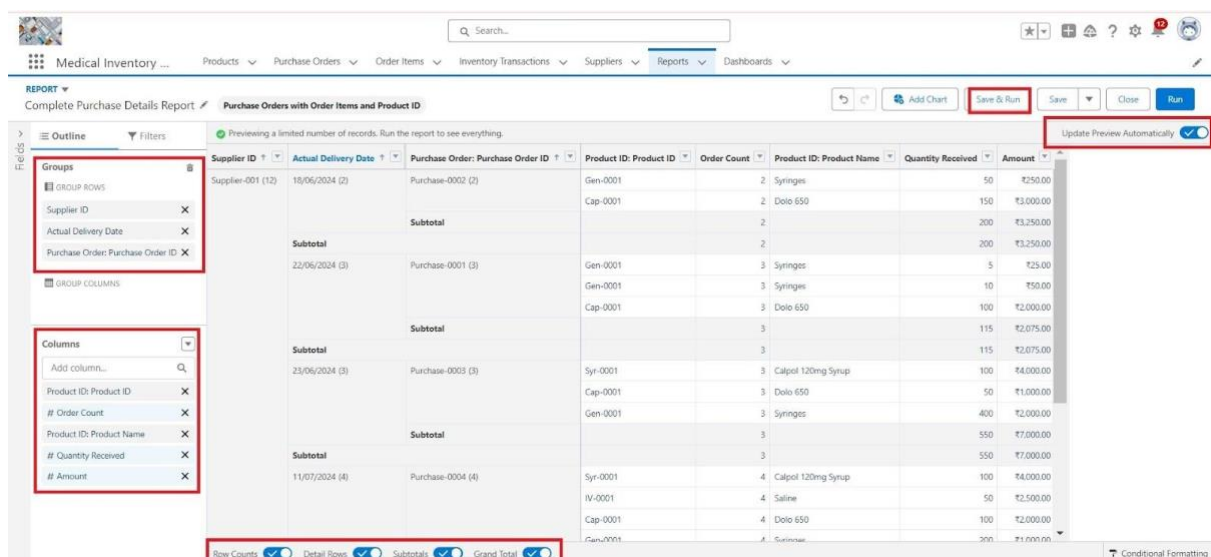
17.1 Created a Complete Purchase Details Report

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 with Order Items and Product ID
>> Click Start report.
6. Click on Filters and select as follows and click on Apply

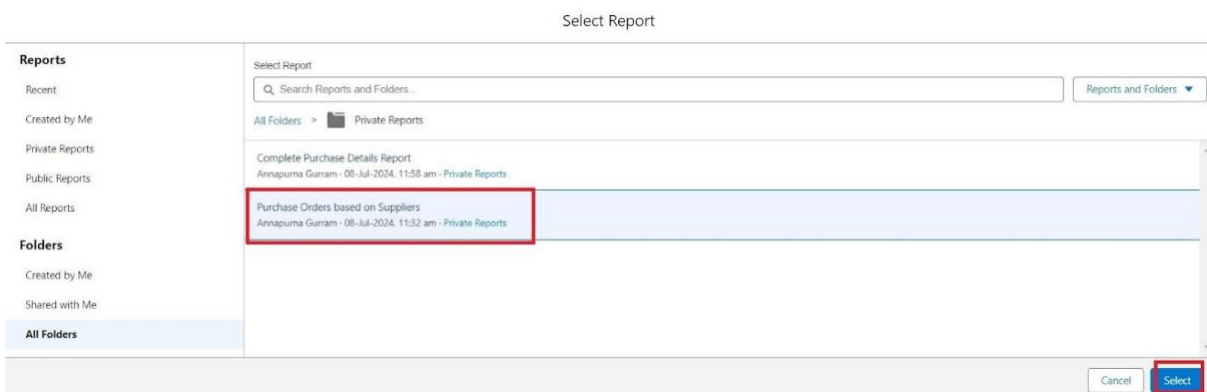
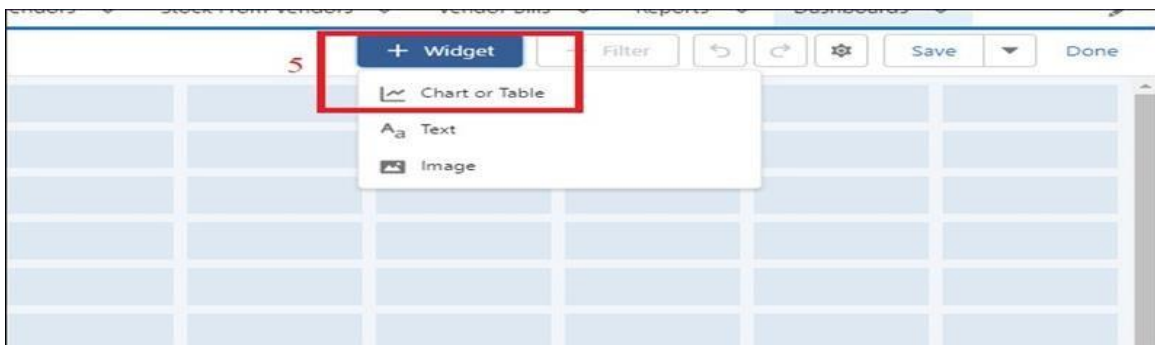


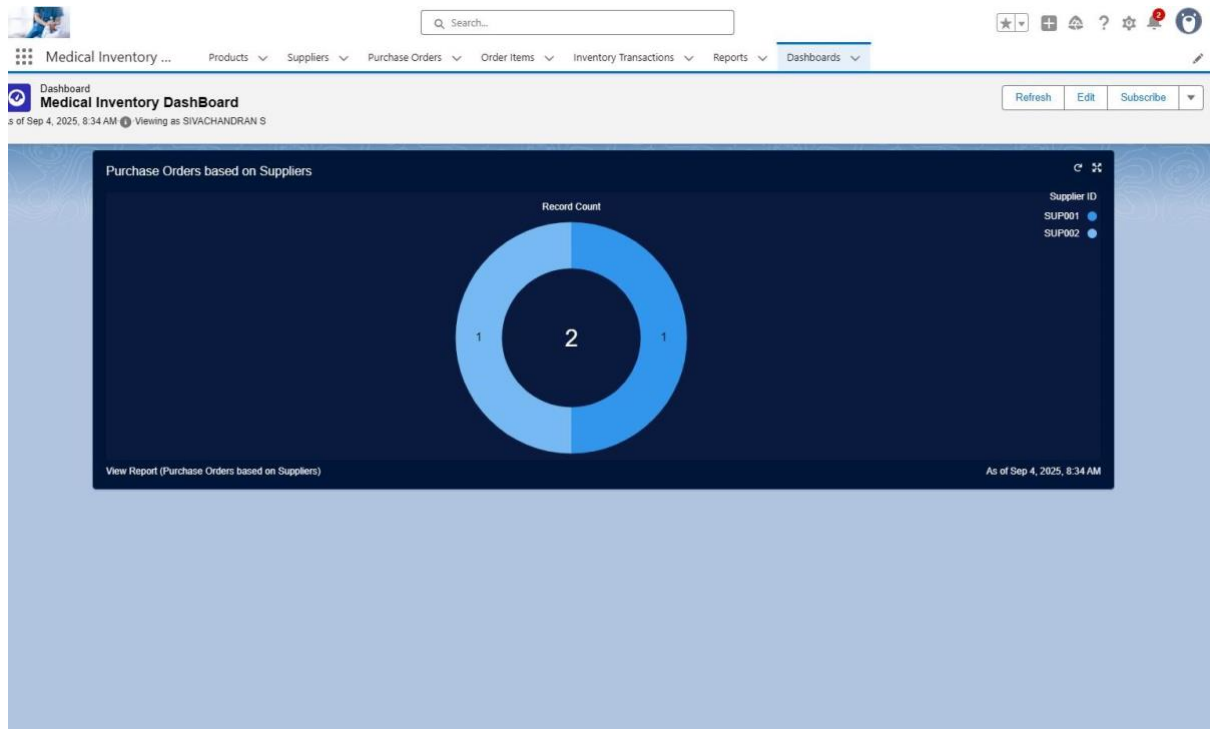
7. Customize your report, in group rows select – Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, for columns Product ID : Product ID, Product ID : Product Name, Order Count, Quantity Received, Amount (In this way we are making a Summary Report).
8. Click save and run
9. Give report name – Complete Purchase Details Report 10. Click Save



18. Created 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.





19. Testing Approach

To ensure the app works as intended:

- **Step 1:** Created sample suppliers, products, purchase orders, and transactions.
- **Step 2:** Verified validations by entering incorrect data.
- **Step 3:** Checked automation by adding inbound transactions to see if stock updated correctly.
- **Step 4:** Reviewed reports and dashboards to ensure accurate totals.

Medical Inventory ...

Products

Suppliers

Purchase Orders

Order Items

Inventory Transactions

Reports

Dashboards

Q Search...

Products

Recently Viewed

New

Import

Change Owner

Assign Label

Q Search this list...

4 items • Updated a few seconds ago

Product ID

1

P004

2

P003

3

P002

4

P001

Medical Inventory ...

Products

Suppliers

Purchase Orders

Order Items

Inventory Transactions

Reports

Dashboards

Q Search...

Suppliers

Recently Viewed

New

Import

Change Owner

Assign Label

Q Search this list...

2 items • Updated a few seconds ago

Supplier ID

1

SUP002

2

SUP001

Medical Inventory ...

Products

Suppliers

Purchase Orders

Order Items

Inventory Transactions

Reports

Dashboards

Q Search...

Purchase Orders

Recently Viewed

New

Import

Change Owner

Assign Label

Q Search this list...

2 items • Updated a few seconds ago

Purchase Order ID

1

P002

2

P001

Medical Inventory ...

Products

Suppliers

Purchase Orders

Order Items

Inventory Transactions

Reports

Dashboards

Q Search...

Order Items

Recently Viewed

New

Import

Assign Label

Q Search this list...

2 items • Updated a few seconds ago

Order Item ID

1

OI002

2

OI001

Medical Inventory ...

Products

Suppliers

Purchase Orders

Order Items

Inventory Transactions

Reports

Dashboards

Q Search...

Inventory Transactions

Recently Viewed

New

Import

Change Owner

Assign Label

Q Search this list...

2 items • Updated a few seconds ago

Inventory Transaction ID

1

T002

2

T001

Medical Inventory ...

Search...

Medical Inventory ...

Products

Suppliers

Purchase Orders

Order Items

Inventory Transactions

Reports

Dashboards

Report: Purchase Orders with Order Items and Product ID

Complete Purchase Details Report

Enable Field Editing

Q

Add Chart

▼

☰

Edit

▼

Total Records: 2

Total Order Count: 2

Total Quantity Received: 90

Total Amount: \$6,600.00

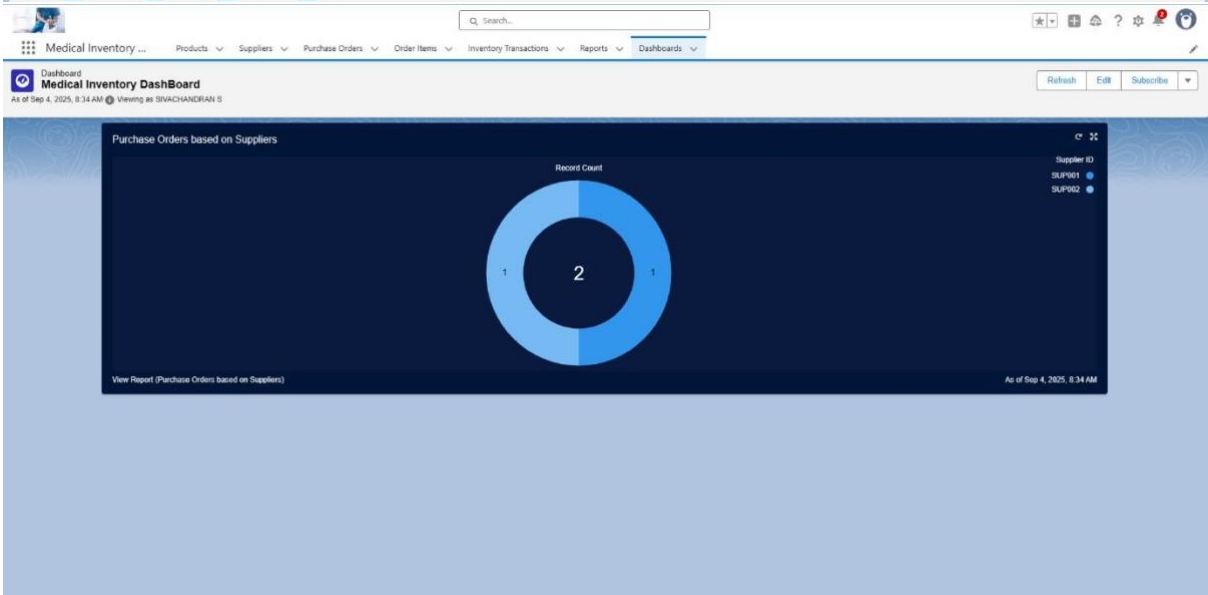
Supplier ID	Actual Delivery Date	Purchase Order: Purchase Order ID	Product ID: Product ID	Order Count	Product ID: Product Name	Quantity Received	Amount
<input type="checkbox"/> SUP001 (1)	9/4/2025 (1)	P001 (1)	01gk000005TAFc	1	Fever Tablet	60	\$3,000.00
		Subtotal		1		60	\$3,000.00
Subtotal				1		60	\$3,000.00
<input type="checkbox"/> SUP002 (1)	9/5/2025 (1)	P002 (1)	01gk000005TTYR	1	Cough Syrup	30	\$3,600.00
		Subtotal		1		30	\$3,600.00
Subtotal				1		30	\$3,600.00
Total (2)				2		90	\$6,600.00

Row Counts

Detail Rows

Subtotals

Grand Total



20. Conclusion

The **Medical Inventory Management System** successfully demonstrates how Salesforce can be used to manage medical products, suppliers, and stock efficiently.

By using custom objects, validation rules, flows, reports, and dashboards, the application provides a complete solution for inventory management with realtime tracking and analytics.