

MEDICAL INVENTORY MANAGEMENT

COLLEGE NAME: NAVARASAM ARTS AND
SCIENCE COLLEGE FOR WOMENS -ARACHALUR

TEAM MEMBERS:

TEAM LEADERNAME: B.GOPIKA

Email: gopika21baskar@gmail.com

TEAM MEMBER: D.Nivetha

Email: nivethad3108@gmail.com

TEAM MEMBER: P.Sujithasri

Email: prabasuji48@gmail.com

TEAM MEMBER: S.PriyaDharshini

Email: ssakthivel3672@gmail.com

1.INTRODUCTION

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.

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 FLOW: MILESTONE 1 : CREATION OF DEVELOPER ACCOUNT

MILESTONE 2 : OBJECT CREATION

MILESTONE 3 : TABS

MILESTONE 4 : THE LIGHTNING APP

MILESTONE 5 : FIELDS

MILESTONE 6 : UPDATING OF PAGE LAYOUTS

MILESTONE 7 : COMPACT LAYOUTS

MILESTONE 8 : VALIDATION RULES

MILESTONE 9 : PROFILES

MILESTONE 10 : ROLES

MILESTONE 11 : USERS

MILESTONE 12 : PERMISSION SETS

MILESTONE 13 : FLOWS

MILESTONE 14 : TRIGGERS

MILESTONE 15 : REPORTS

MILESTONE 16 : DASHBOARDS

MILESTONE 17 : CONCLUSION

PHASE 1: SALESFORCE ACCOUNT:

ACTIVITY 1: CREATING DEVELOPER ACCOUNT

Creating a developer org in salesforce. Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

[HTTPS://DEVELOPER.SALESFORCE.COM/SIGNUP](https://developer.salesforce.com/signup)

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

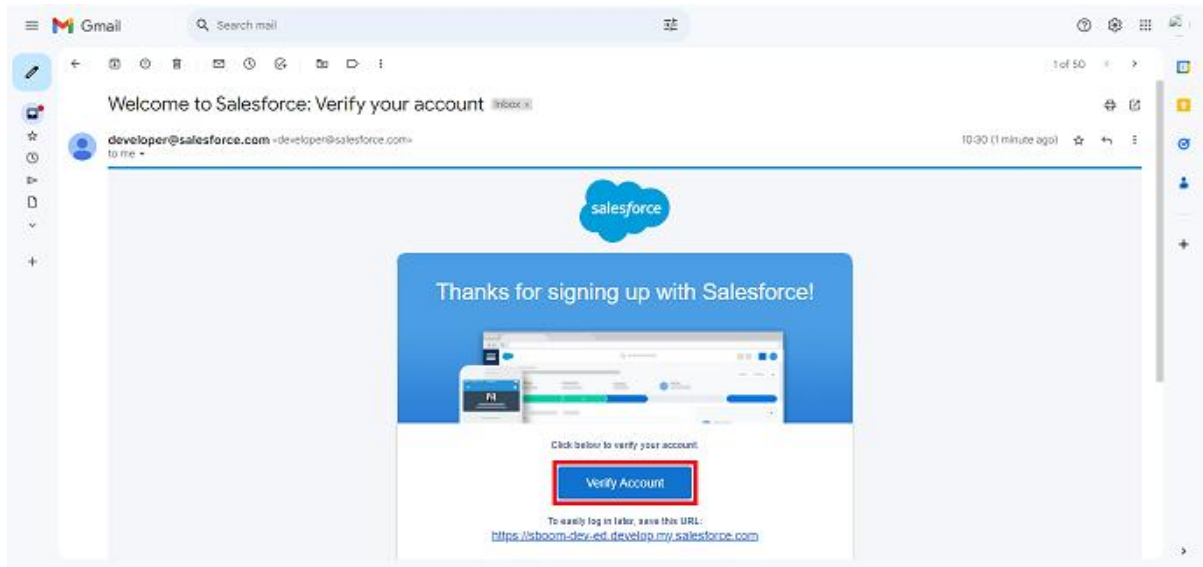
Company*
Company Name

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

ACTIVITY 2: ACCOUNT ACTIVATION

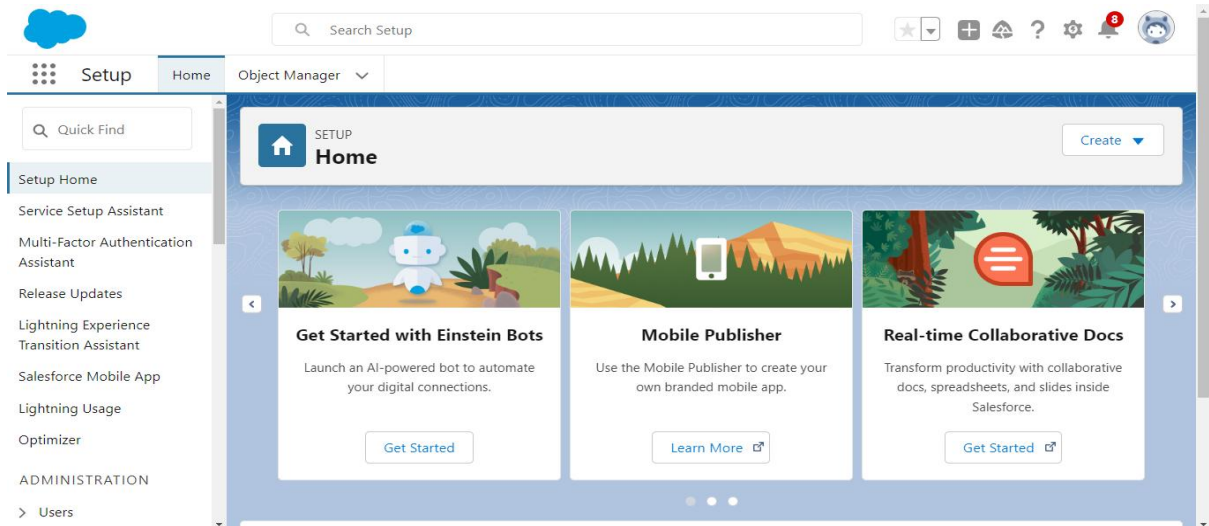
Click on the verify account to activate your account. The email may take 5-10mins.



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

A screenshot of the 'Change Your Password' form in Salesforce. The form is titled 'Change Your Password' and asks to 'Enter a new password for lead@sb.com'. It lists requirements: 8 characters, 1 letter, and 1 number. There are four input fields: 'New Password' (with a 'Good' strength indicator), 'Confirm New Password' (with a 'Match' indicator), 'Security Question' (a dropdown menu showing 'In what city were you born?'), and 'Answer' (containing 'asdfghjkl'). A blue 'Change Password' button is at the bottom, highlighted with a red rectangular box.

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



We need to login to the salesforce page like this

MLESTONE 2 : OBJECT :-

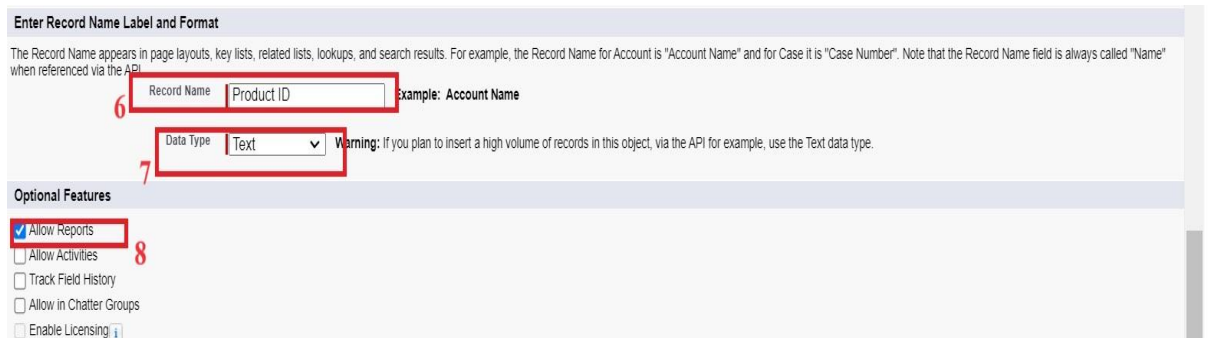
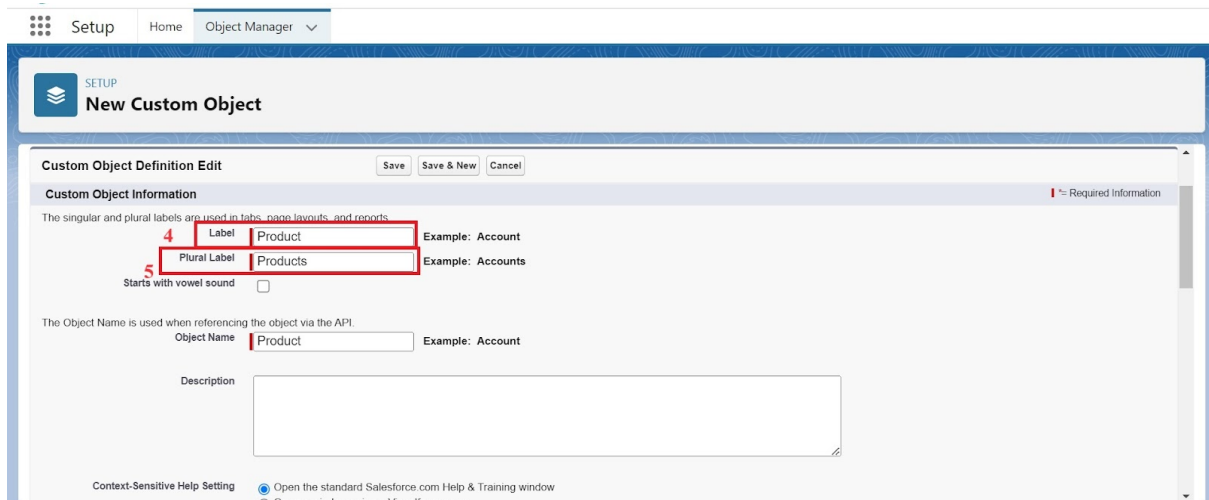
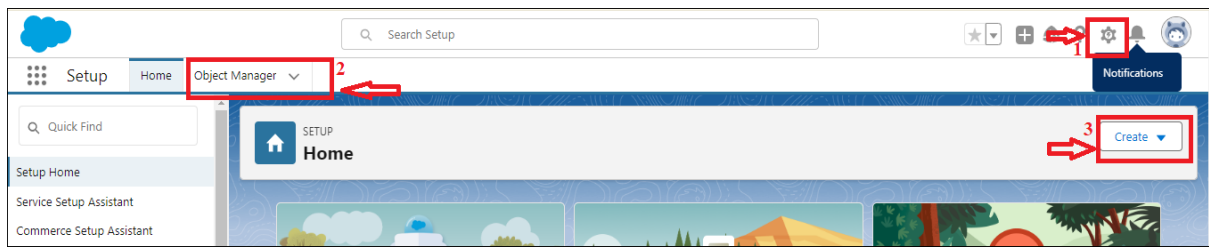
ACTIVITY 1: CREATING A PRODUCT OBJECT

To create an object:

FROM THE SETUP PAGE
CLICK ON OBJECT MANAGER
CLICK ON CREATE >> CLICK ON CUSTOM OBJECT.
ENTER THE LABEL NAME AS PRODUCT
ENTER PLURAL LABEL NAME AS PRODUCTS
ENTER RECORD NAME AS PRODUCT ID
SELECT DATA TYPE AS TEXT.
SELECT ALLOW REPORTS.

Select Allow search.

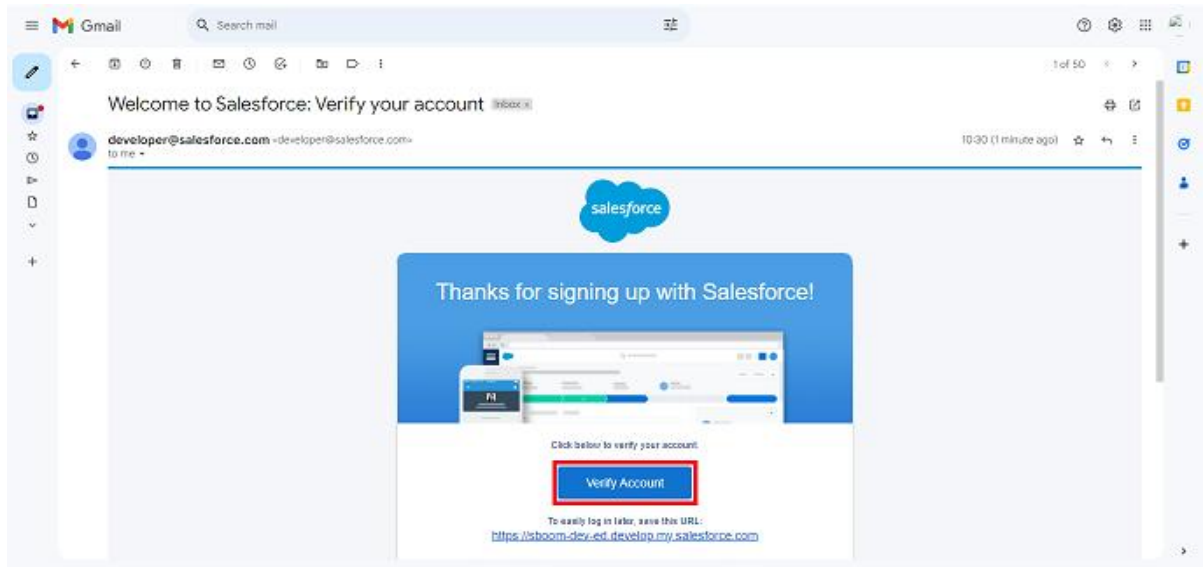
CLICK ON SAVE AND NEW



WE NEED TO CREATE IN SALESFORCE OBJECT NAME IS PRODUCTS AND LOGIN IN IN SALESFORCE

Activity 2: Account Activation

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.

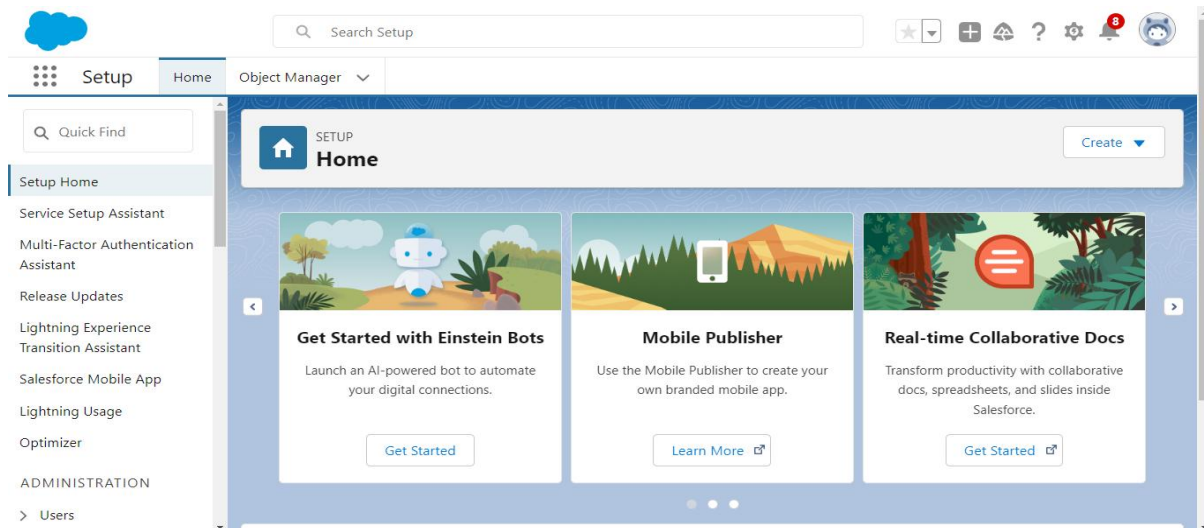


Click on Verify Account

Give a password and answer a security question and click on change password.

A screenshot of the 'Change Your Password' form. The form title is 'Change Your Password'. It asks to 'Enter a new password for lead@sb.oom.' and lists requirements: '8 characters', '1 letter', and '1 number'. There are two password fields: 'New Password' and 'Confirm New Password', both with red outlines. Below them is a 'Security Question' dropdown menu with the option 'In what city were you born?'. The 'Answer' field contains the text 'asdfghjkl'. At the bottom is a blue 'Change Password' button with a red outline.

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



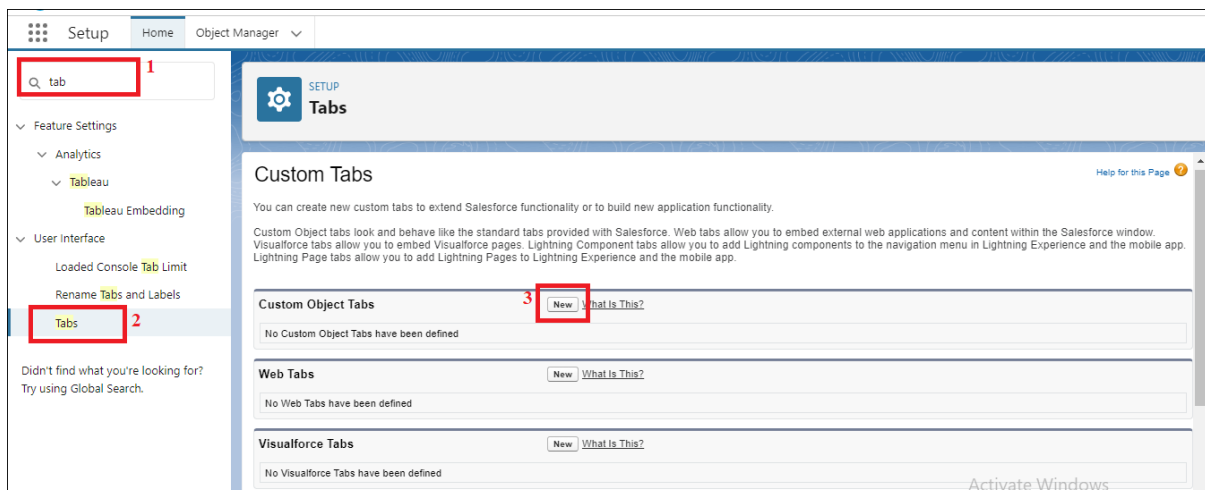
Follow this steps and do it correctly

MLESTONE 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



We created this tabs in salesforce

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 .

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

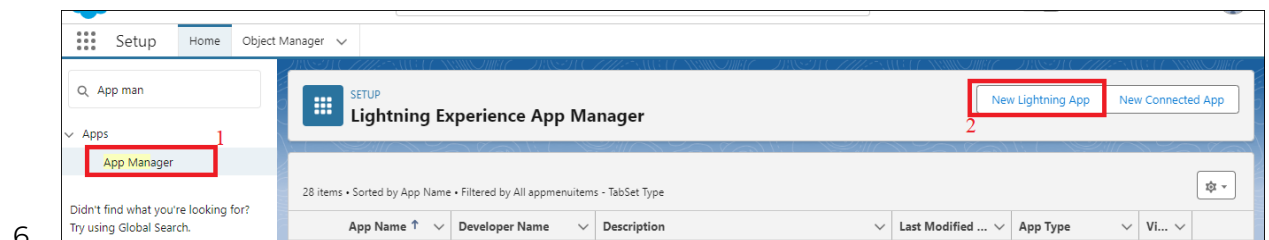
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

Custom Object Tabs			New	What Is This?
Action	Label	Tab Style		
Edit Del	Inventory Transactions	Chess piece		
Edit Del	Order Items	Bell		
Edit Del	Products	Stethoscope		
Edit Del	Purchase Orders	Saxophone		
Edit Del	Suppliers	Bottle		

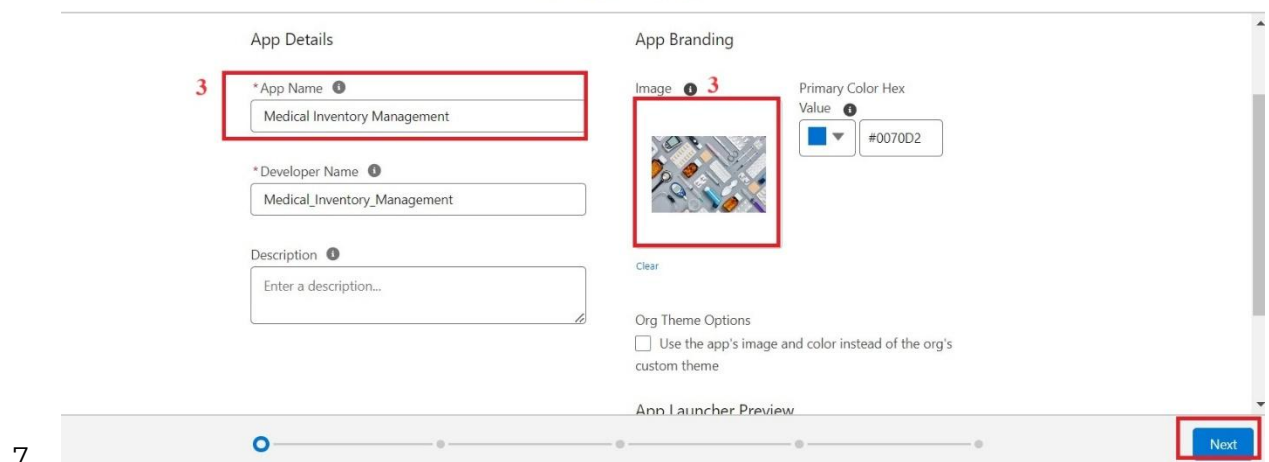
MILESTONE 4- THE LIGHTNING APP

Activity 1: Create a Lightning App for Medical Inventory Management

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

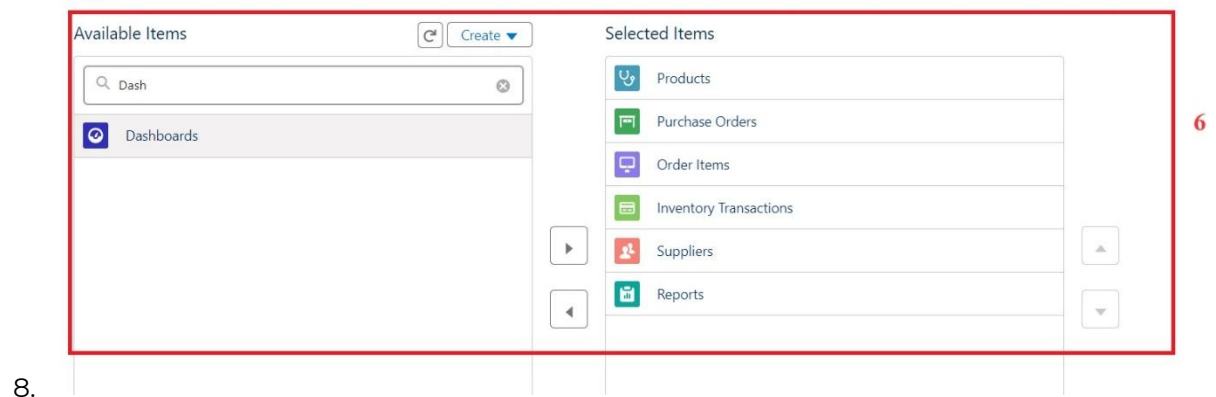


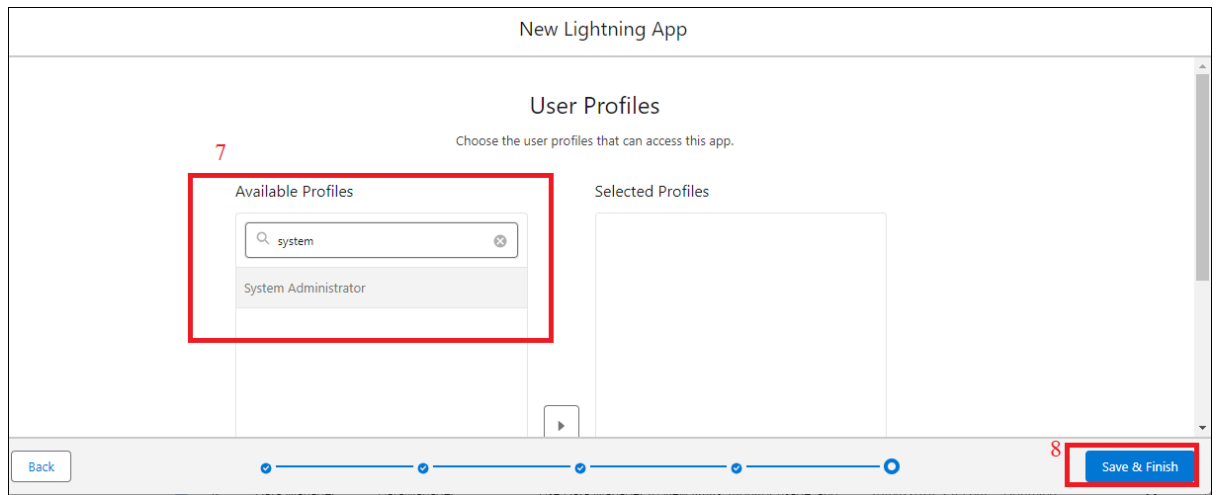
New Lightning App



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.





9.

We created the Medical Inventory Management app in salesforce

MILESTONE 5- FIELDS

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)

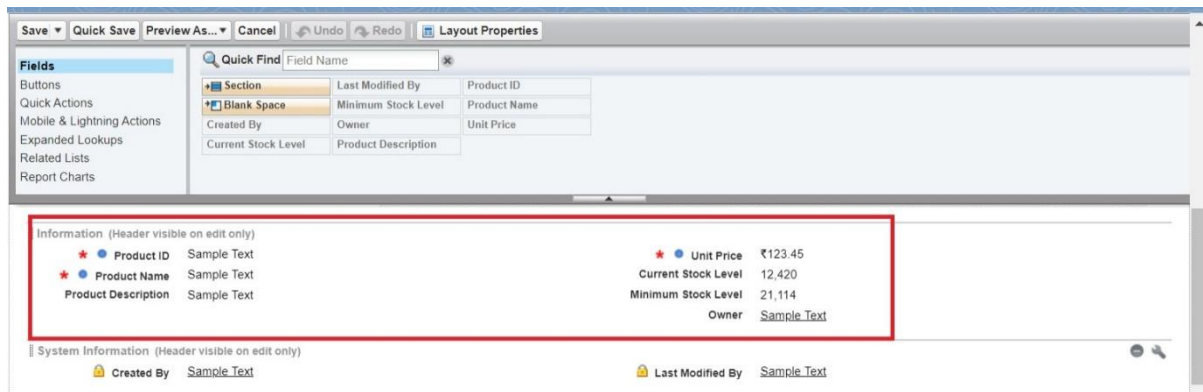
	Order Date	Date
	Expected Delivery Date	Date
	Actual Delivery Date	Date
	Order Count	Roll-Up Summary (COUNT Order Item)
	Total Order Cost	Currency(16, 2)
Order Item	Order Item ID(Standard)	Text
	Product ID	Lookup(Product)
	Purchase Order ID	Master-Detail(Purchase Order)
	Quantity Ordered	Number(18, 0)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

	Total Order Cost	Formula(Currency)
Supplier	Supplier ID(Standard)	Text
	Supplier Name	Text
	Contact Person	Text
	Phone Number	Phone
	Email	Email
	Address	TextArea

MILESTONE 6 -EDITING OF PAGE LAYOUTS

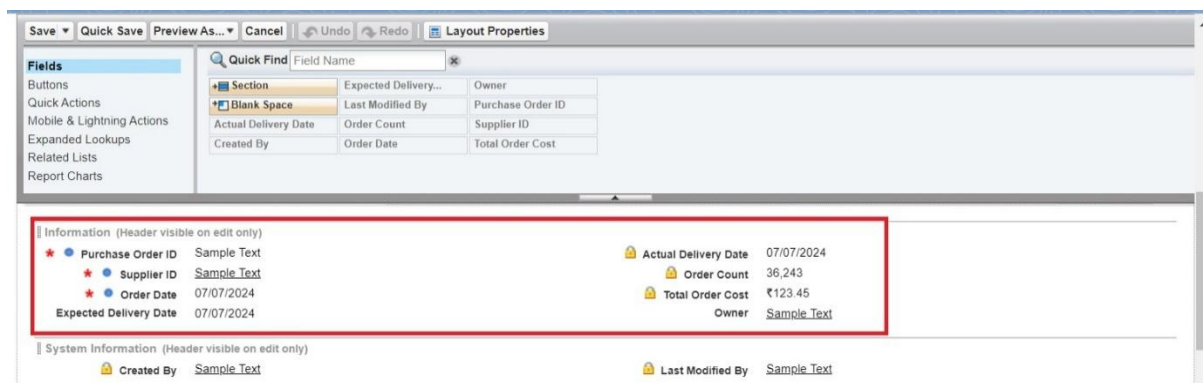
ACTIVITY 1: TO EDIT A PAGE LAYOUT IN PRODUCT OBJECT

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.



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



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

SETUP > OBJECT MANAGER
Order Item

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

Fields

Quick Find Field Name

Section	Last Modified By	Quantity Ordered
Blank Space	Order Item ID	Quantity Received
Amount	Product ID	Unit Price
Created By	Purchase Order ID	

Information (Header visible on edit only)

Order Item ID	Sample Text	Purchase Order ID	Sample Text
Amount	₹123.45		

Product details

Product ID	Sample Text	Quantity Ordered	23,712
Unit Price	₹123.45	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)

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

SETUP > OBJECT MANAGER
Inventory Transaction

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

Fields

Quick Find Field Name

Section	Owner	Transaction ID
Blank Space	Purchase Order ID	Transaction Type
Created By	Total Order Cost	
Last Modified By	Transaction Date	

Information (Header visible on edit only)

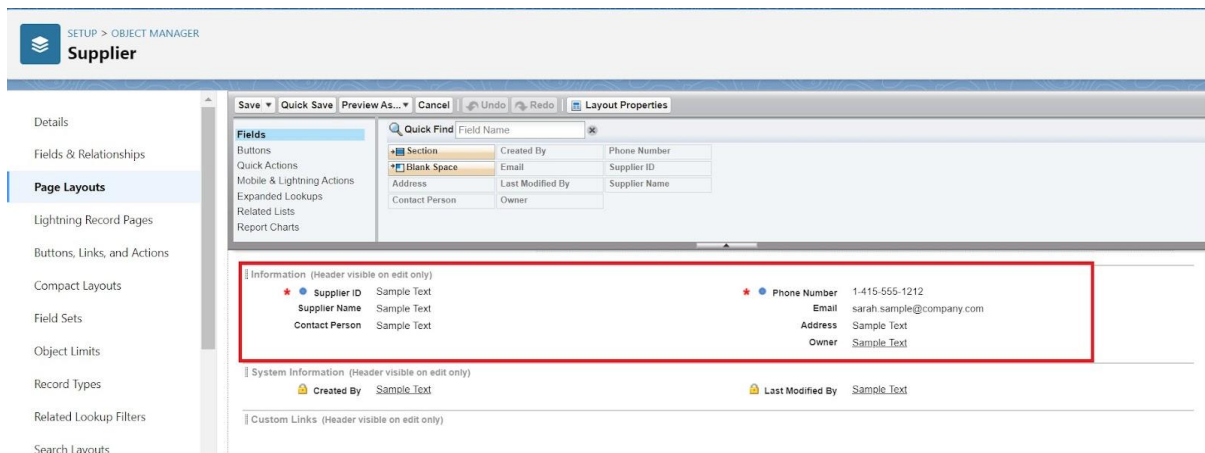
Transaction ID	Sample Text	Owner	Sample Text
Purchase Order ID	Sample Text		
Transaction Type	Sample Text		
Transaction Date	07/07/2024		
Total Order Cost	₹123.45		

System information (Header visible on edit only)

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

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



MILESTONE 7 - COMPACT LAYOUTS

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.

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 Items, Sorted by Label

Quick Find **New** Compact Layout Assignment

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

Enter Compact Layout Information Required Information

Label
Name

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:

Save **Cancel**

ACTIVITY 2: TO CREATE A COMPACT LAYOUT TO A PURCHASE ORDER OBJECT

1. Click on Compact Layouts in the sidebar .
2. Click on New.
3. Enter the Label as “Purchase Order Compact Layout”.
4. Select the Compact Layout Fields : Select Purchase Order ID, Order Date, Total Order Cost, Supplier ID.
5. Click Save.
6. Click Compact Layout Assignment.
7. Click Edit Assignment.
8. Choose "Purchase Order Compact Layout" from the dropdown.
9. Click Save.

The screenshot displays the 'Compact Layout Edit' window. At the top, there are 'Save' and 'Cancel' buttons. Below this is the 'Enter Compact Layout Information' section, which includes a 'Label' field containing 'Purchase Order Compact L' (highlighted with a red box and a red '4') and a 'Name' field containing 'Purchase_Order_Compact_'. The 'Select Compact Layout Fields' section is below, featuring two columns: 'Available Fields' and 'Selected Fields'. The 'Available Fields' list includes 'Actual Delivery Date', 'Created By', 'Expected Delivery Date', 'Last Modified By', 'Owner', and 'Order Count'. The 'Selected Fields' list includes 'Purchase Order ID', 'Order Date', 'Total Order Cost', and 'Supplier ID' (highlighted with a red box and a red '5'). Between these columns 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 'Save' button (highlighted with a red box and a red '6') and a 'Cancel' button. A small note at the bottom states: 'Use SHIFT + click to select adjacent fields. Use CTRL + click to select an assortment of fields.'

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

We need to create an Purchase Order Compact Layout in the salesforce like activity 1

MILESTONE 8 - VALIDATION RULES

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 :
(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

Insert Field Insert Operator

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

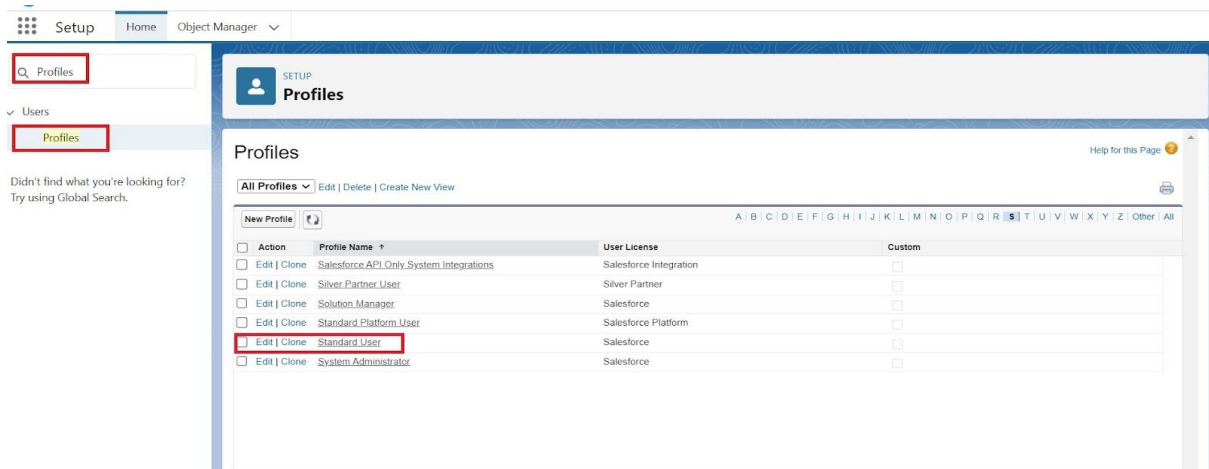
8 Save Save & New Cancel

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.

MILESTONE 9 – PROFILES

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.



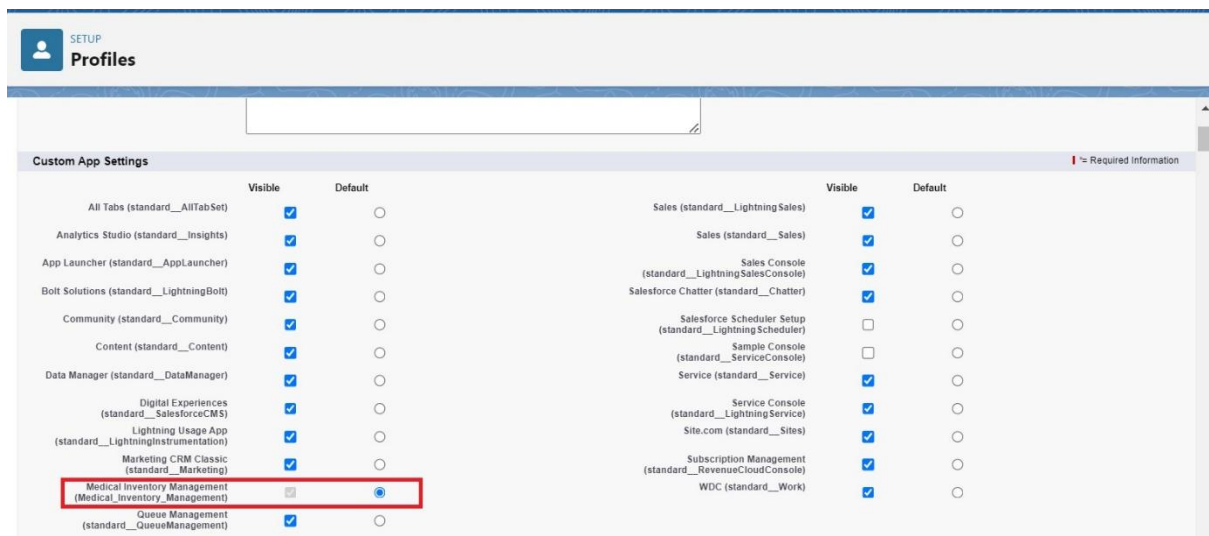
Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

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

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



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	Modify All
Inventory Transactions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Order Items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Purchase Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Suppliers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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"/>
Save Save & New Cancel	

ACTIVITY 2: TO CREATE AN PURCHASE MANAGER PROFILE

IN THIS CREATING AN PURCHASE MANAGER PROFILE IS SAME LIKE ACTIVITY 1

All Profiles Edit Delete Create New View			
New Profile			
Action	Profile Name	User License	
<input type="checkbox"/> Edit Clone	Partner App Subscription User	Partner App Subscription	
<input type="checkbox"/> Edit Clone	Partner Community Login User	Partner Community Login	
<input type="checkbox"/> Edit Clone	Partner Community User	Partner Community	
<input type="checkbox"/> Edit Del ...	Purchase Manager	Salesforce	

MILESTONE 10 - ROLES

ACTIVITY 1 : CREATE A PURCHASING MANAGER ROLE.

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

The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Roles' link is highlighted under the 'Users' section. The main content area is titled 'Understanding Roles' and provides information on setting up a role hierarchy. A sample role hierarchy is displayed for 'Territory-based Sample', showing a hierarchy from 'Executive Staff' down to 'Sales Rep' roles. A 'Set Up Roles' button is located at the bottom right of the main content area.

Click on Expand All and click on add role under SVP, Sales & Marketing role.

Give Label as “Purchasing Manager” and Role name gets auto populated. Then click on Save.




Role Edit
New Role

Role Edit

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

ACTIVITY 2 : CREATE A PURCHASING MANAGER ROLE.

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

 SETUP

Roles

Role Edit

New Role

Role Edit

Label

Inventory Manager

Role Name

Inventory_Manager

This role reports to

SVP, Sales & Marketing

Role Name as displayed on reports

Save

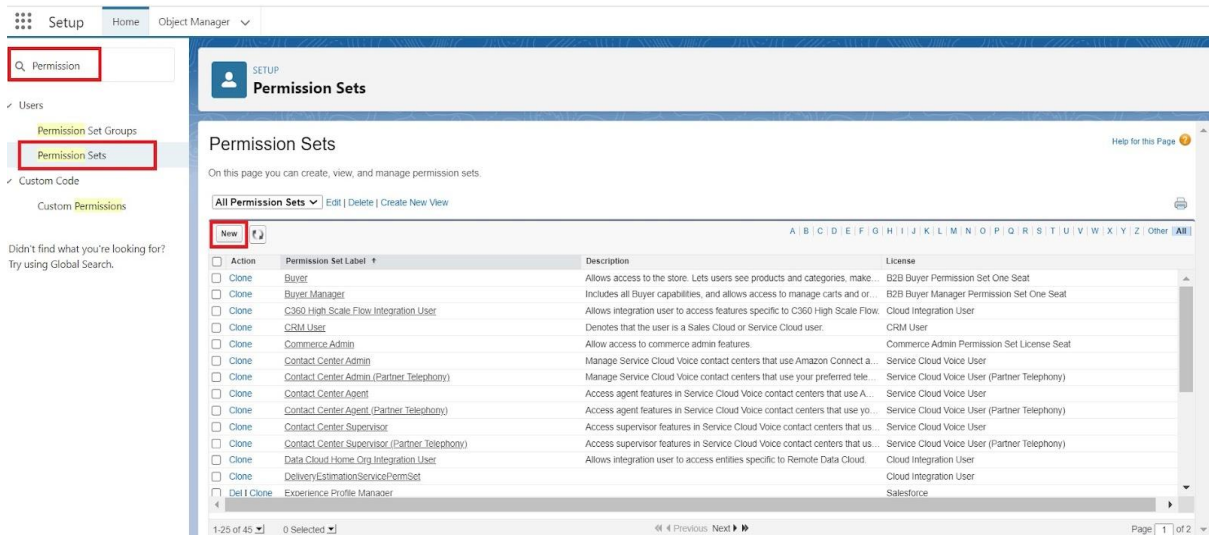
Save & New

Cancel

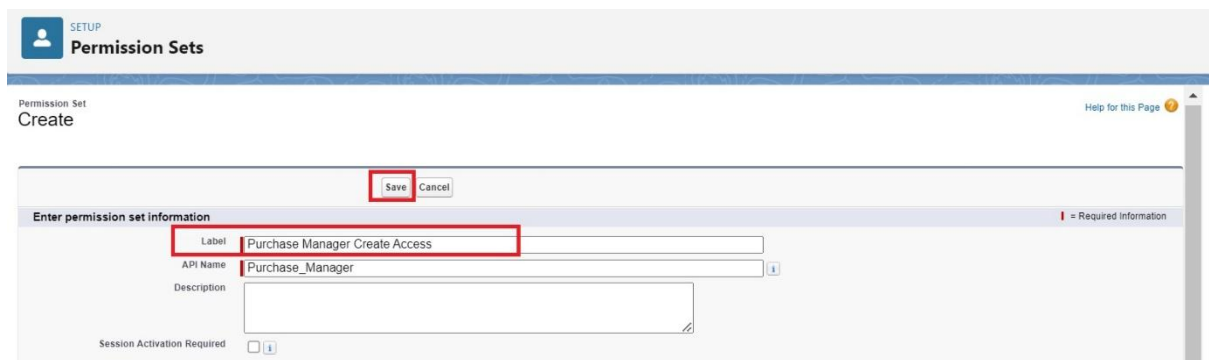
MILESTONE 12 - PERMISSION SETS

ACTIVITY 1 : CREATE A PERMISSION SET.

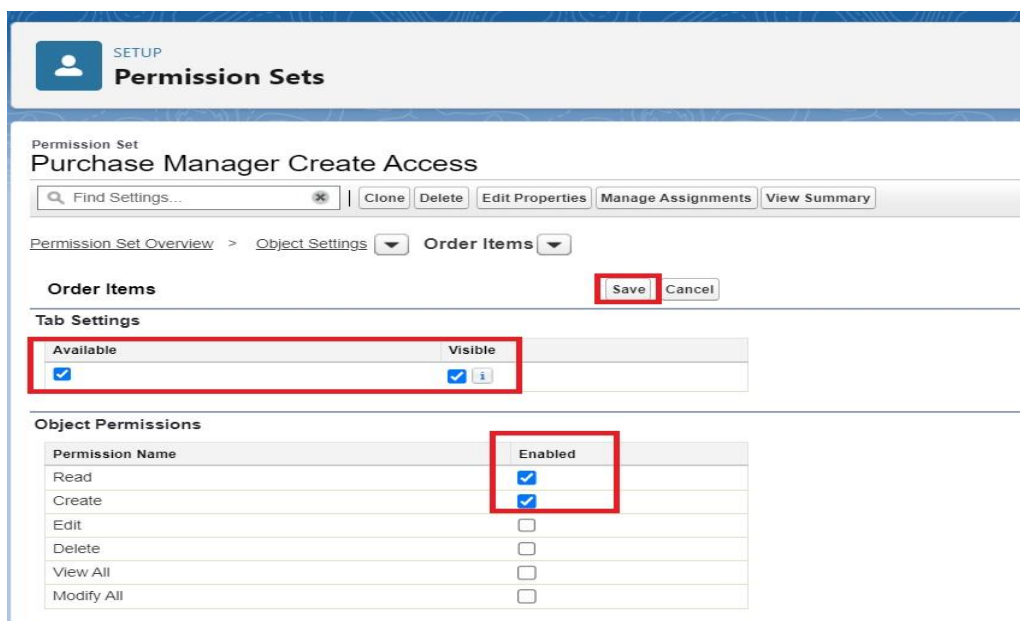
1. Go to setup >> type Permission in quick find box >> Select Permission Set >>
2. click on New.



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



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



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

Search this list...

	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Annapurna Gurram	AGurr	medicalinventory@sb.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00ddl0000058bqluaa.yrgohck7wjvo@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00ddl0000058bqluaa.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@00ddl0000058bqluaa.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	✓	Salesforce	Never Expires

Cancel

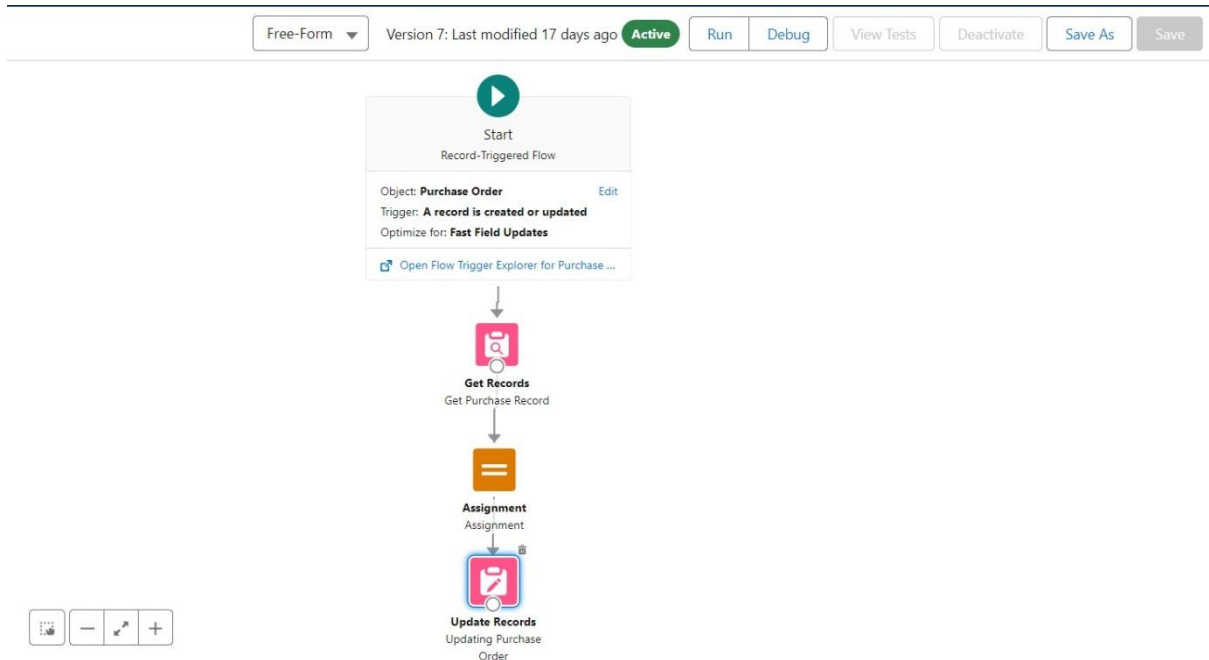
Back

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.



MILESTONE 14 – TRIGGERS

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.

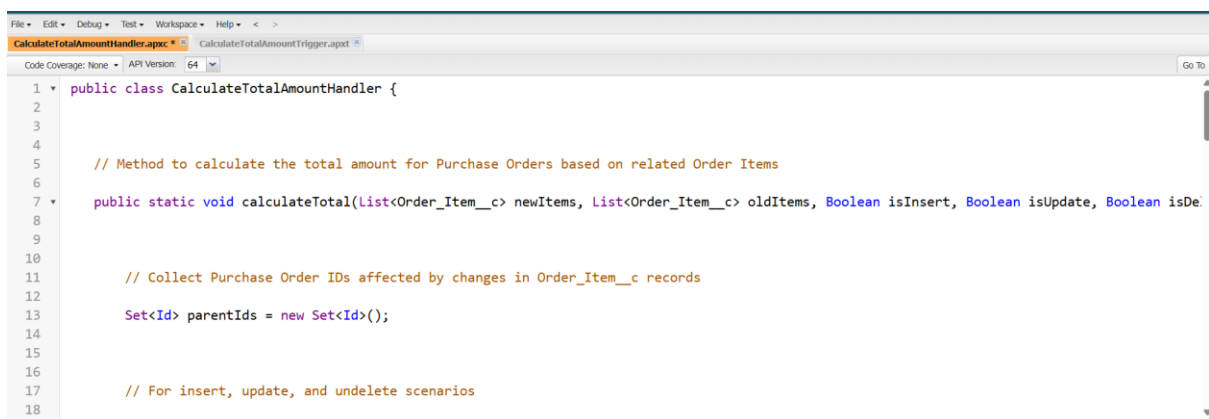
ii) Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

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.



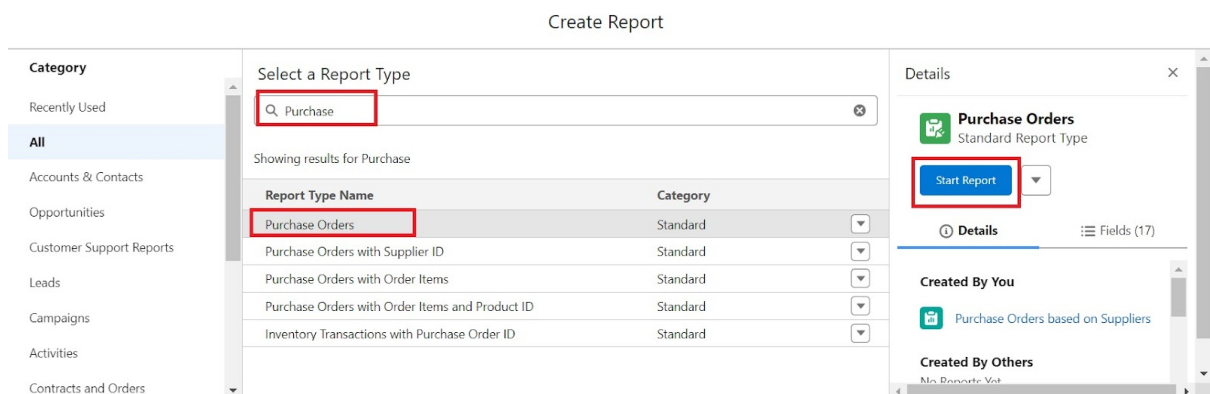
```
1 public class CalculateTotalAmountHandler {
2
3
4
5 // Method to calculate the total amount for Purchase Orders based on related Order Items
6
7 public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean isDe
8
9
10
11 // Collect Purchase Order IDs affected by changes in Order_Item__c records
12
13 Set<Id> parentIds = new Set<Id>();
14
15
16
17 // For insert, update, and undelete scenarios
18
```

Save it.

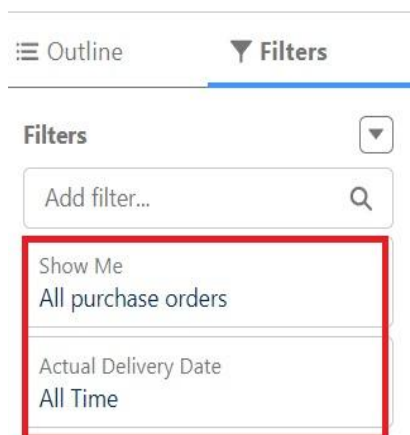
MILESTONE 15 - REPORTS

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



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”)

Medical Inventory ... Products Purchase Orders Order Items Inventory Transactions Suppliers Reports Dashboards

REPORT Purchase Orders based on Suppliers Purchase Orders

Save & Run Save Close Run

Update Preview Automatically

Previewing a limited number of records. Run the report to see everything.

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

Row Counts Detail Rows Subtotals Grand Total

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.

Medical Inventory ... Products Purchase Orders Order Items Inventory Transactions Suppliers Reports Dashboards

Report: Purchase Orders Purchase Orders based on Suppliers

Enable Field Editing Add Chart Edit

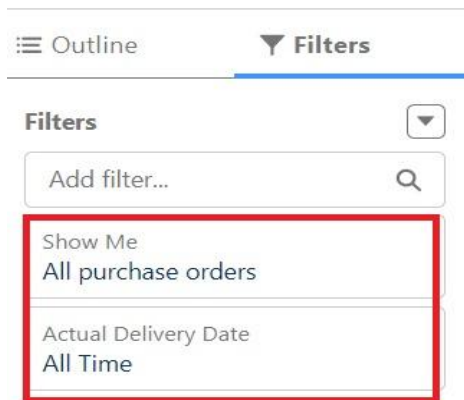
Total Records: 5 Total Order Count: 14 Total Total Order Cost: ₹26,325.00

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

Row Counts Detail Rows Subtotals Grand Total

ACTIVITY 2: CREATE 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

Medical Inventory ... Products Purchase Orders Order Items Inventory Transactions Suppliers Reports Dashboards

REPORT Complete Purchase Details Report Purchase Orders with Order Items and Product ID

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

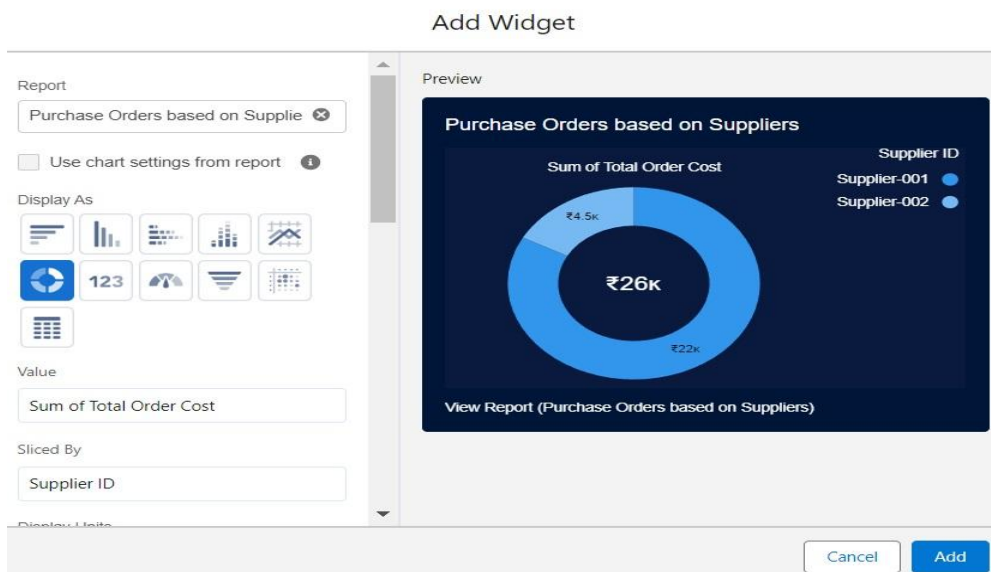
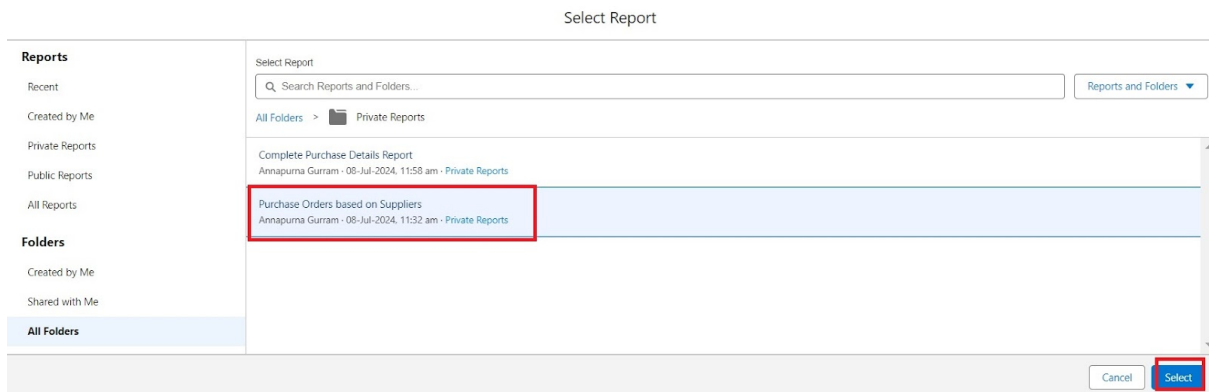
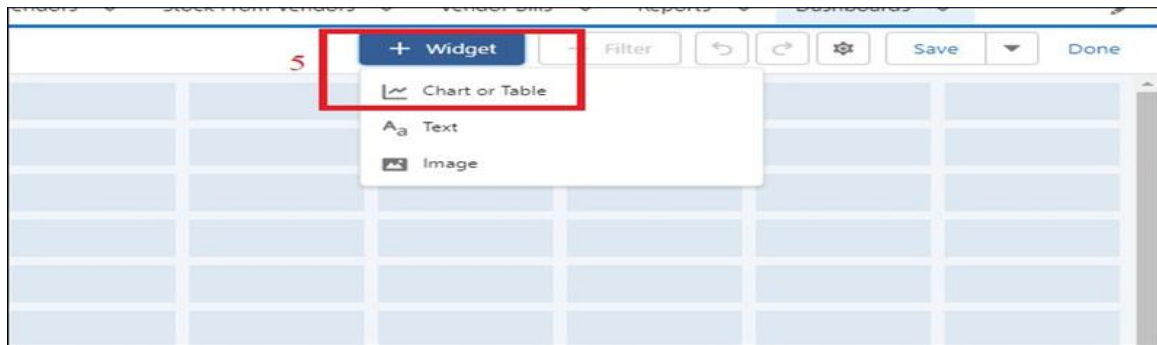
Supplier ID	Actual Delivery Date	Purchase Order: Purchase Order ID	Product ID: Product ID	Order Count	Product ID: Product Name	Quantity Received	Amount
Supplier-001 (12)	18/06/2024 (2)	Purchase-0002 (2)	Gen-0001	2	Syringes	50	\$250.00
			Cap-0001	2	Dolo 650	150	\$3,000.00
			Subtotal	2		200	\$3,250.00
	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
	23/06/2024 (3)	Purchase-0003 (3)	Gen-0001	3	Syringes	115	\$2,075.00
			Cap-0001	3	Dolo 650	100	\$4,000.00
			Gen-0001	3	Syringes	50	\$1,000.00
	11/07/2024 (4)	Purchase-0004 (4)	Gen-0001	3	Syringes	400	\$2,000.00
			Cap-0001	3	Dolo 650	550	\$7,000.00
			Gen-0001	3	Syringes	550	\$7,000.00

Row Counts Detail Rows Subtotals Grand Total

MILESTONE 16 – DASHBOARDS

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.



Add Widget

Title

Subtitle

Footer

Legend Position

Widget Theme


☐ Light (Dashboard default)

☒ Dark

Preview

Purchase Orders based on Suppliers

Sum of Total Order Cost



₹26k

Supplier ID

Supplier-001 ●

Supplier-002 ●

[View Report \(Purchase Orders based on Suppliers\)](#)

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

