MEDICAL INVENTORY MANAGEMET

COLLEGE NAME: NAVARASAM ARTS AND SCIENCE COLLAGE FOR WOMANS -ARACHALUR

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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

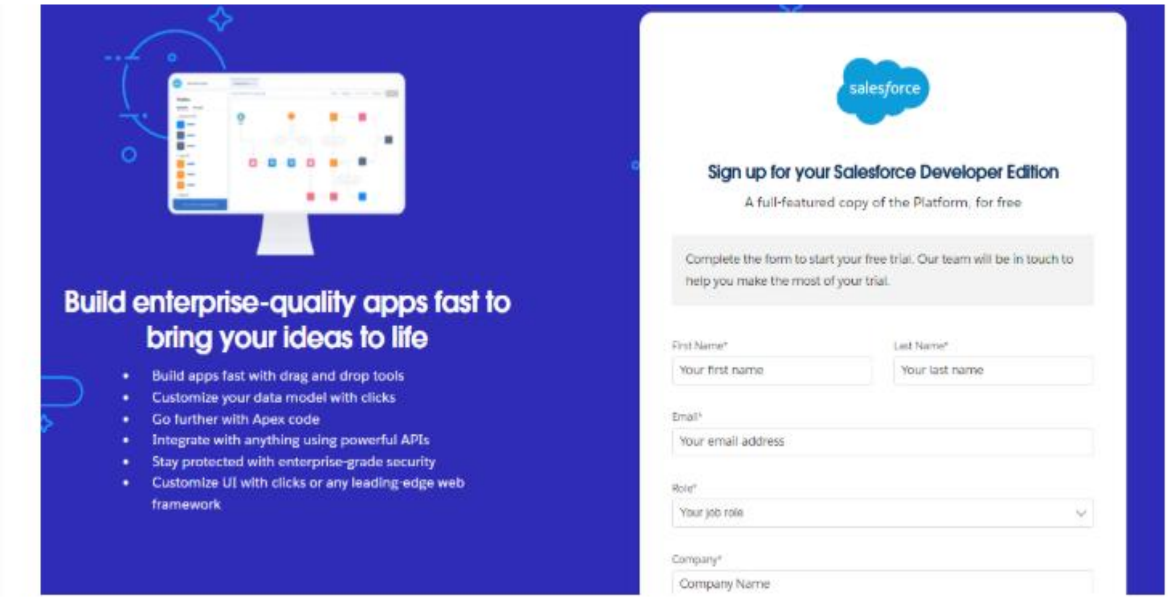
MILESTONE 17 : CONCLUSION

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

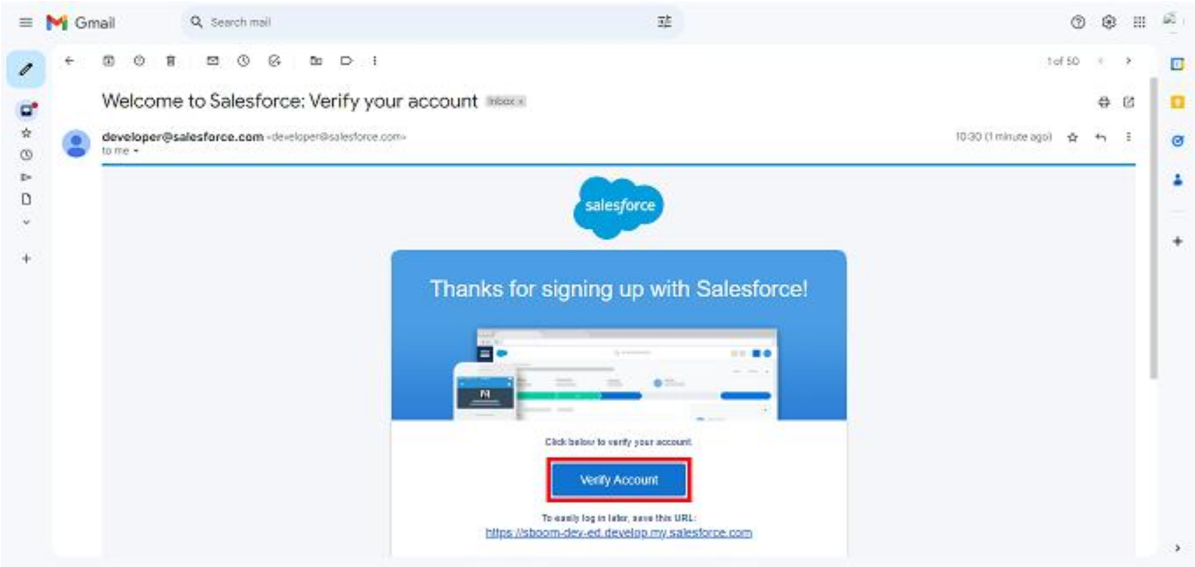


1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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

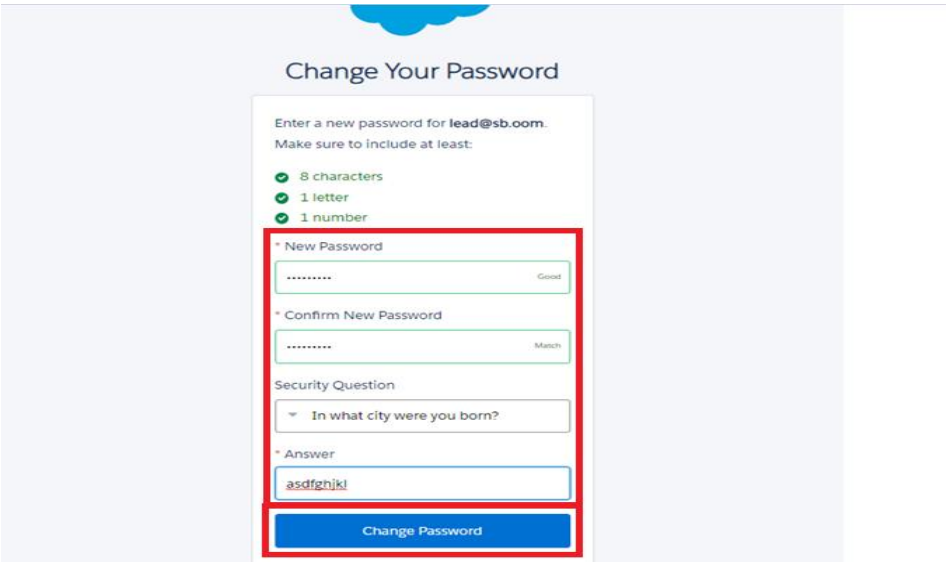
ACTIVITY 2: ACCOUNT ACTIVATION

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

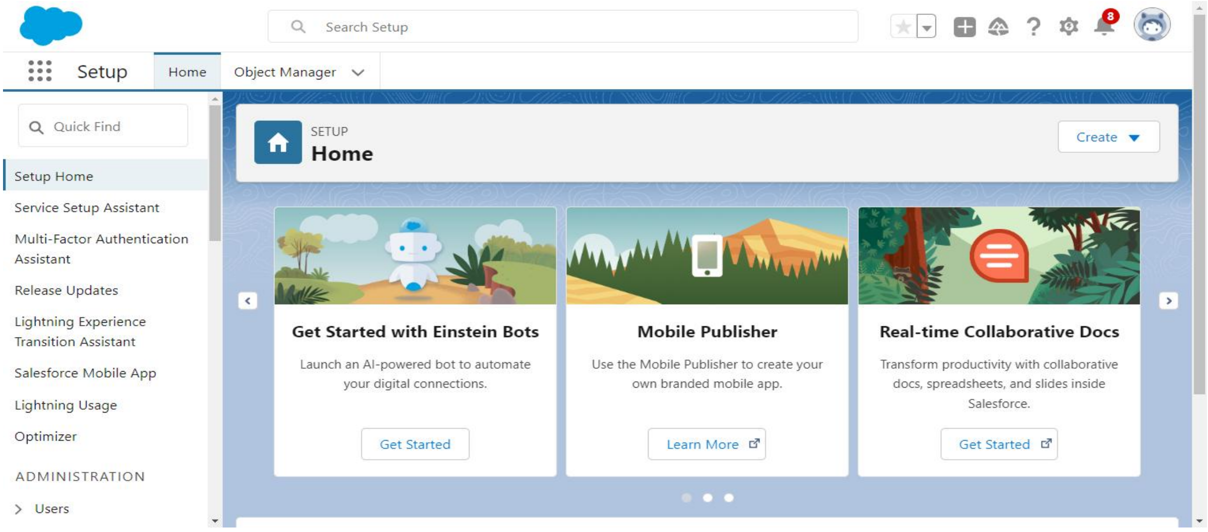


2. Click on Verify Account

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



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



We need to login to the salesforce page like this

MILESTONE 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

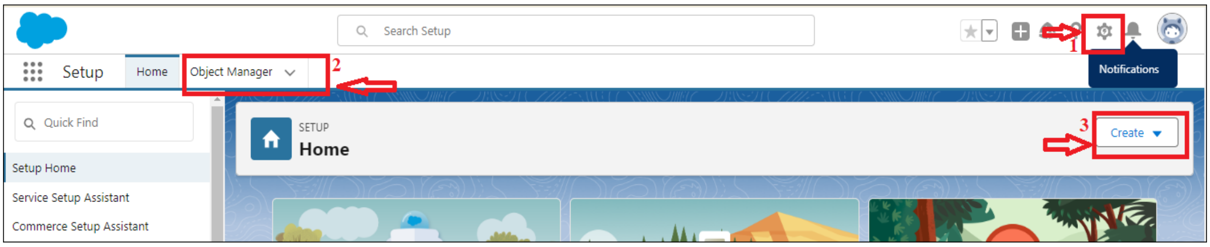
ENTER RECORD NAME AS PRODUCT ID

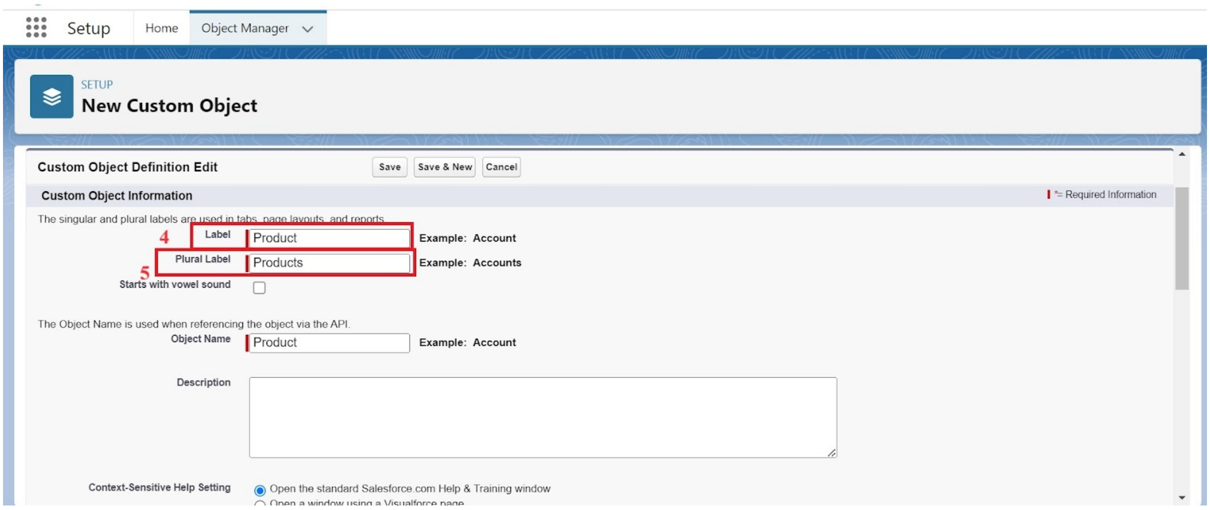
SELECT DATA TYPE AS TEXT.

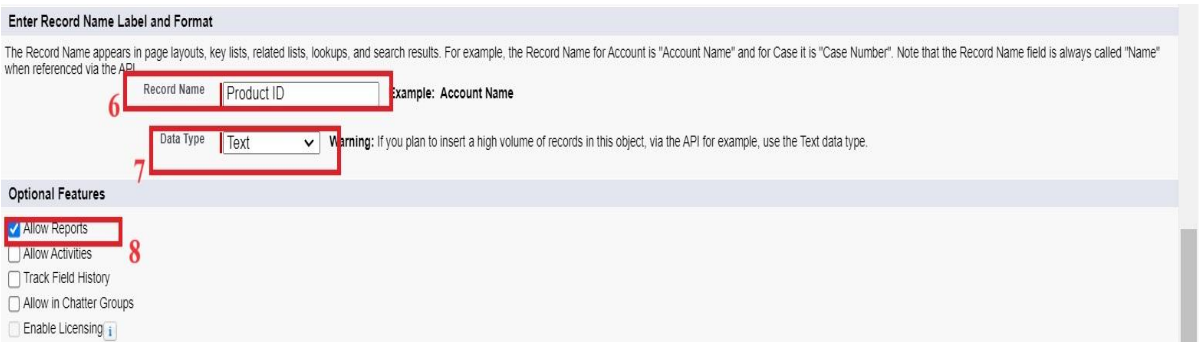
SELECT ALLOW REPORTS.

Select Allow search.

CLICK ON SAVE AND NEW



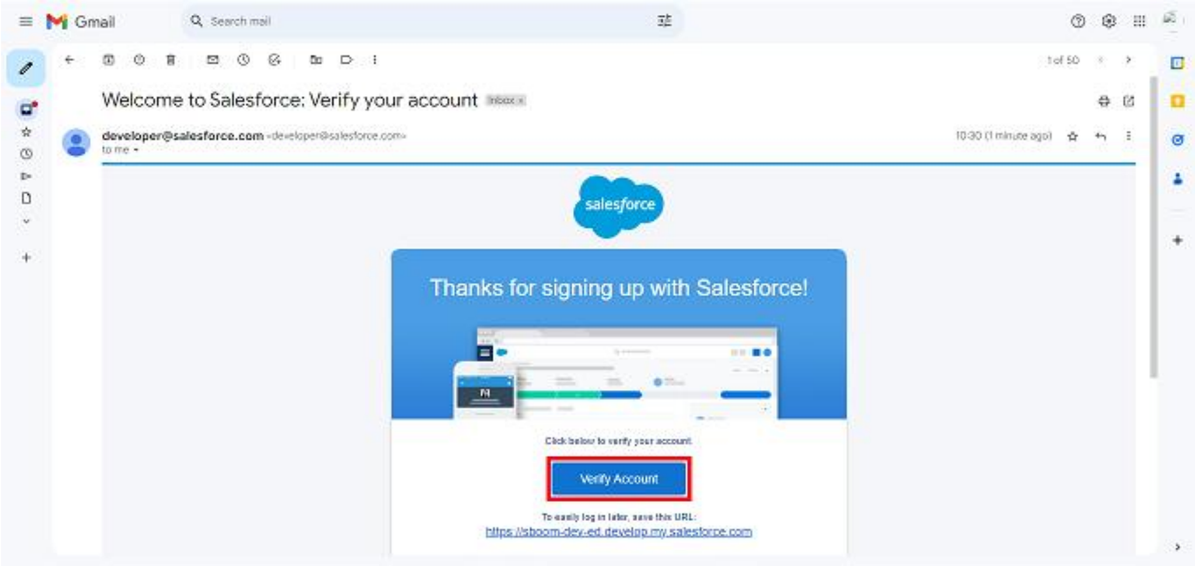




WE NEED TO CREATE IN SALESFORCE OBJECT NAME IS PRODUCTS AND LOGIN IN IN SALESFORCE

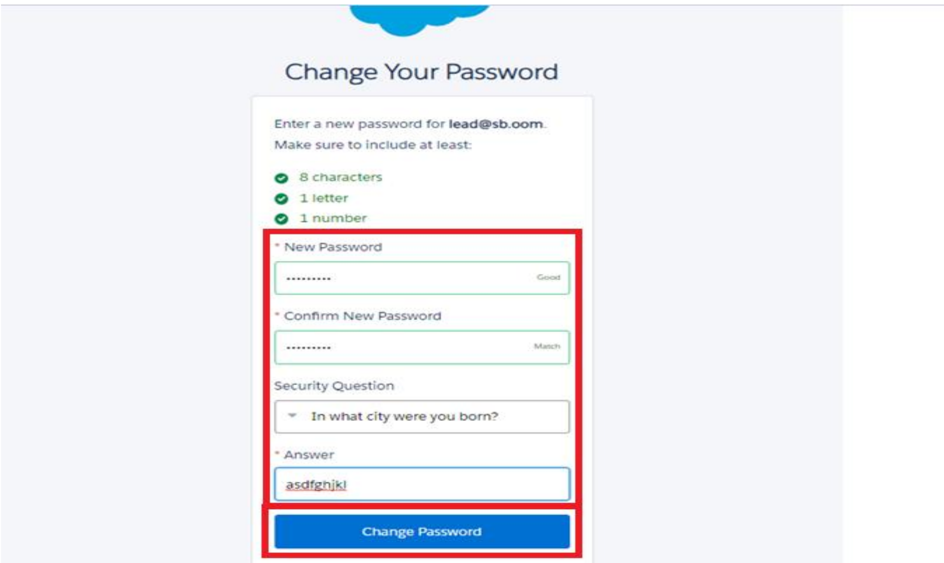
Activity 2: Account Activation

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.

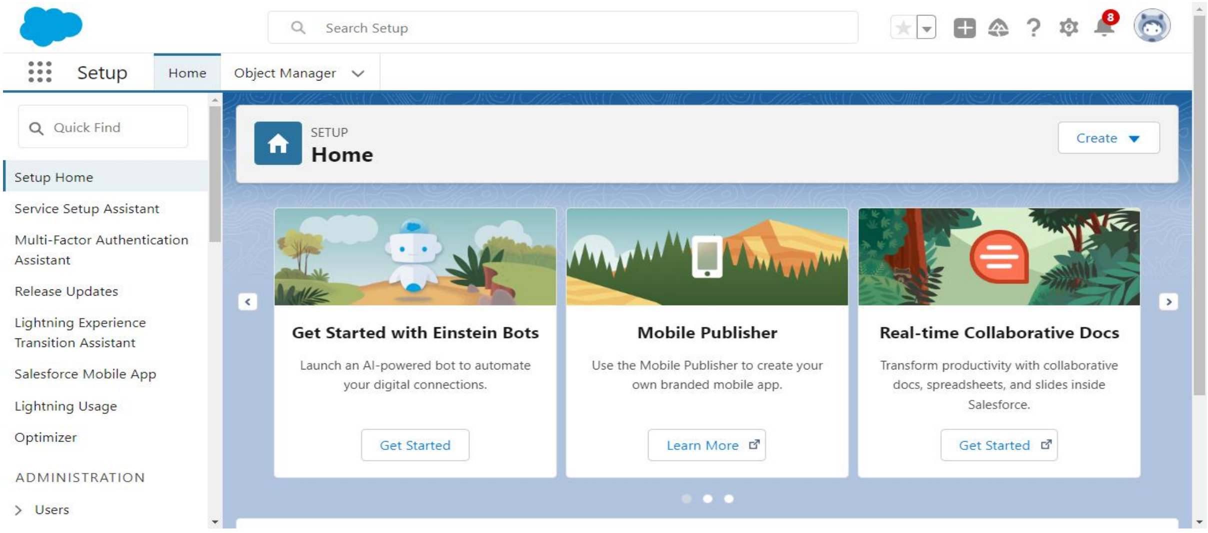


Click on Verify Account

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



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



Follow this steps and do it correctly

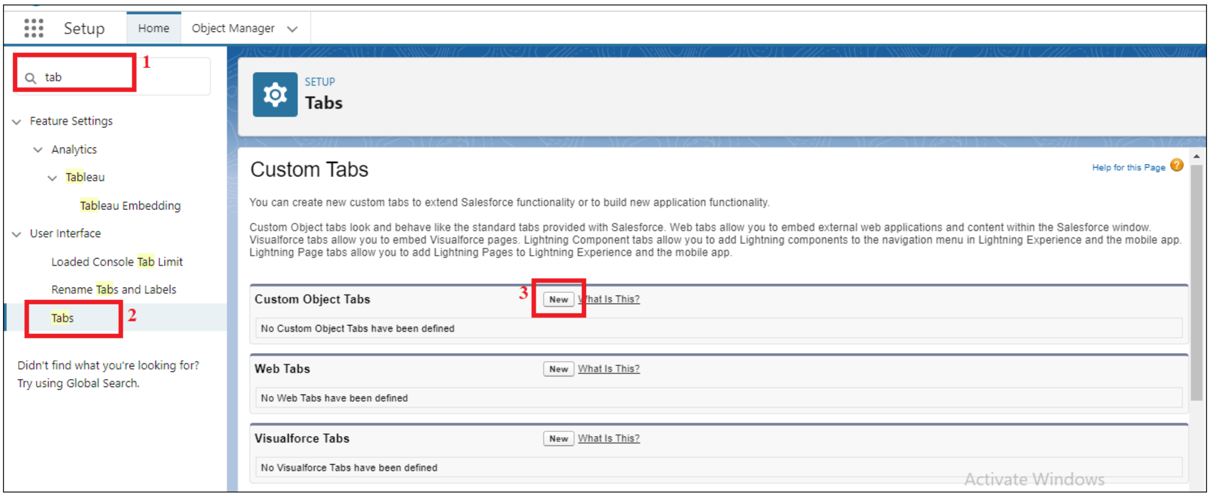
MILESTONE 3-

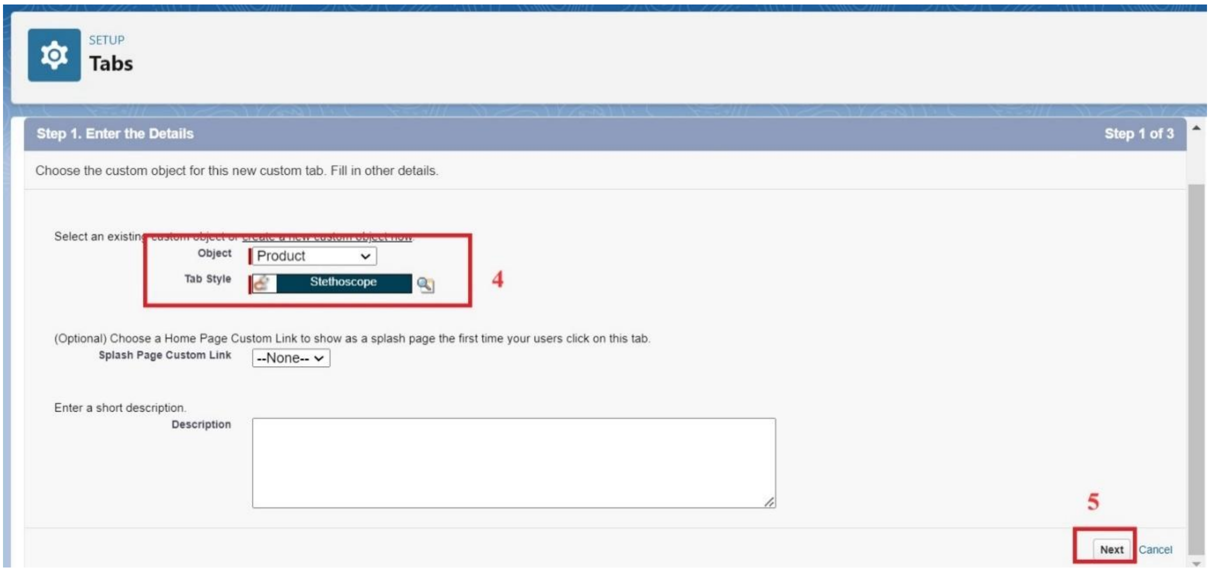
TABS

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



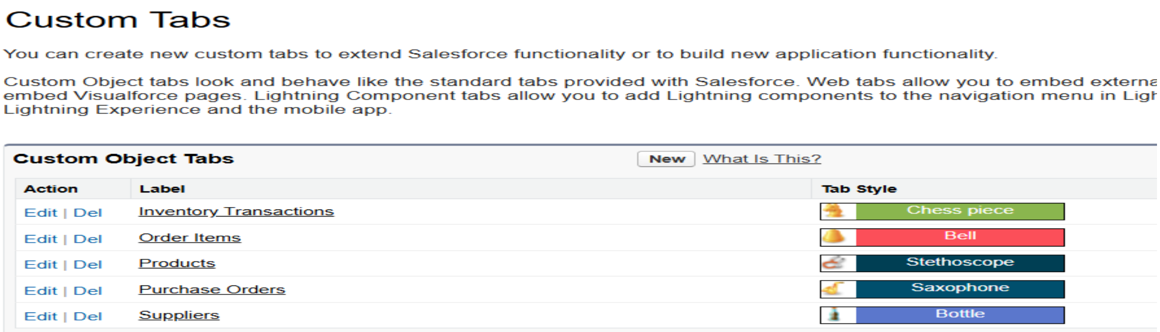


We created this tabs in salesforce

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 externa embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Ligh 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

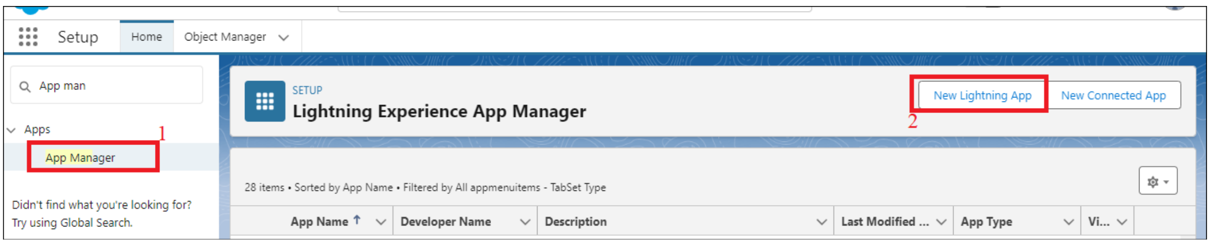
1. Enter Medical Inventory Management as the App Name >> Click on upload image and add an image related to Medical Inventory then click next

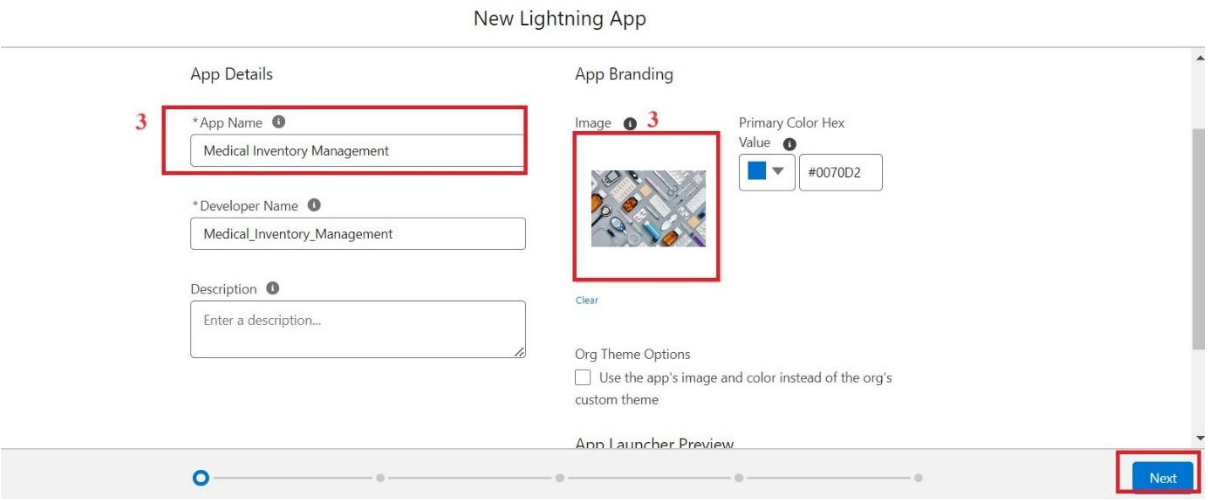
2. Under App Options, leave the default selections and click next.

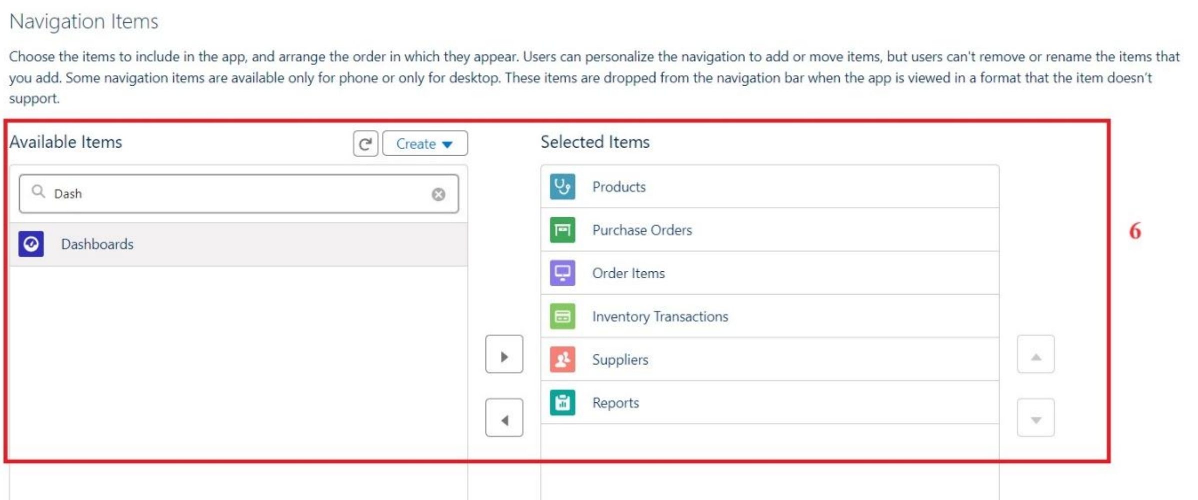
3. Under Utility Items, leave as is and click Next.

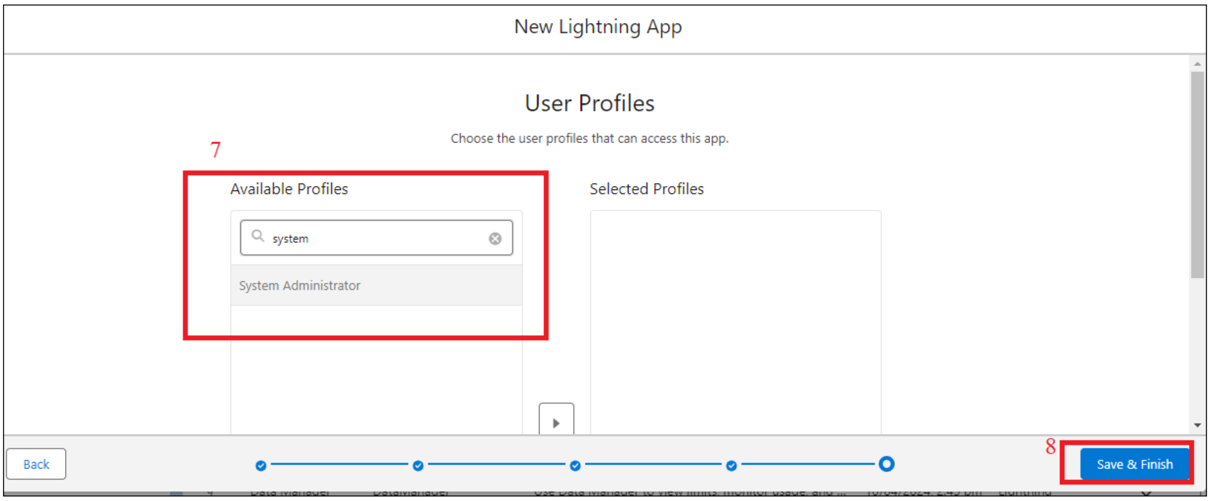
4. From Available Items, select Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards and move them to Selected Item and Click Next.

5. From Available Profiles, select System Administrator and move it to Selected Profiles.

6. 

7. 

8. 

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)

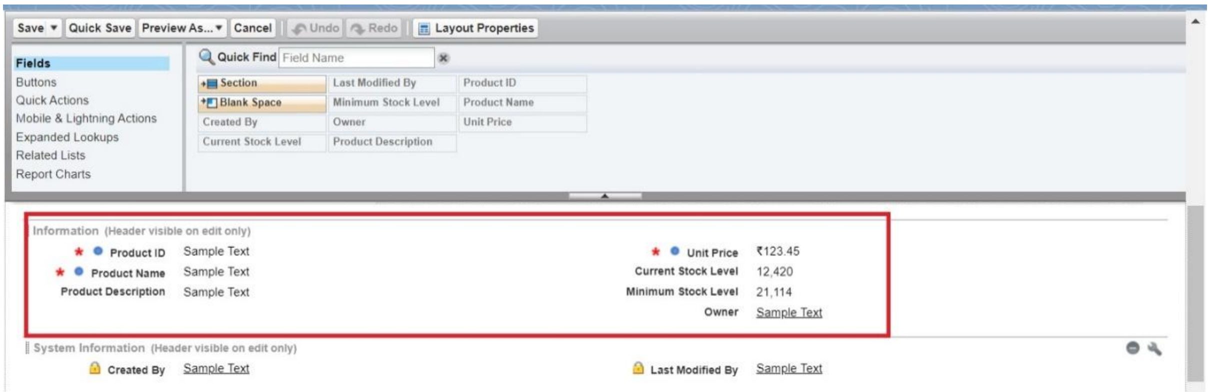
	Order Date	Date
	Expected Delivery Date	Date
	Actual Delivery Date	Date
	Order Count	Roll-Up Summary (COUNT Order Item)
	Total Order Cost	Currency(16, 2)
Order Item	Order Item ID(Standard)	Text
	Product ID	Lookup(Product)
	Purchase Order ID	Master-Detail(Purchase Order)
	Quantity Ordered	Number(18, 0)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

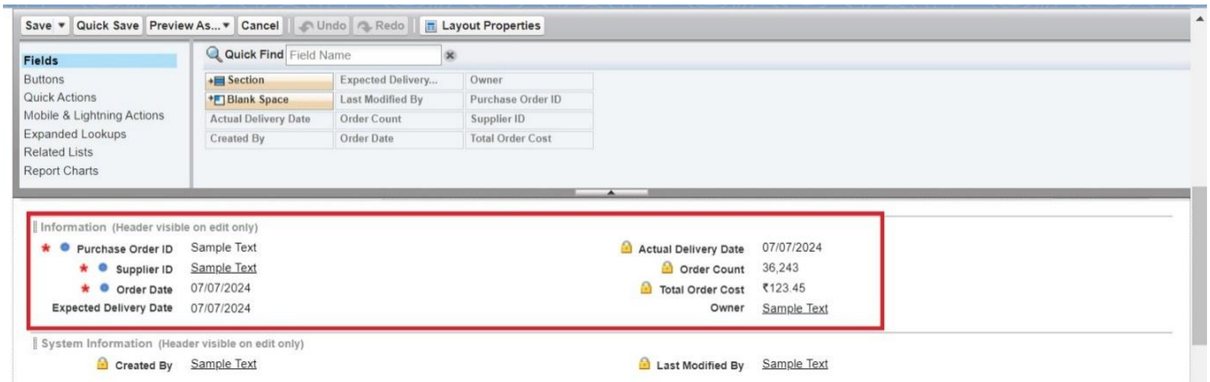
ACTIVITY 1: TO EDIT A PAGE LAYOUT IN PRODUCT OBJECT

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

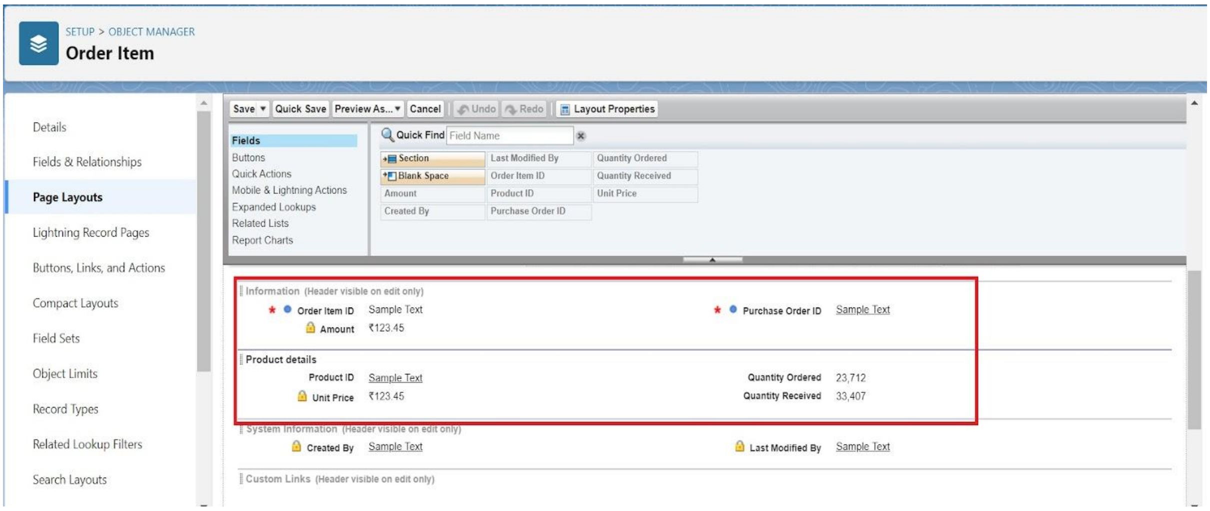


ACTIVITY 3: TO EDIT A PAGE LAYOUT IN ORDER ITEM OBJECT

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

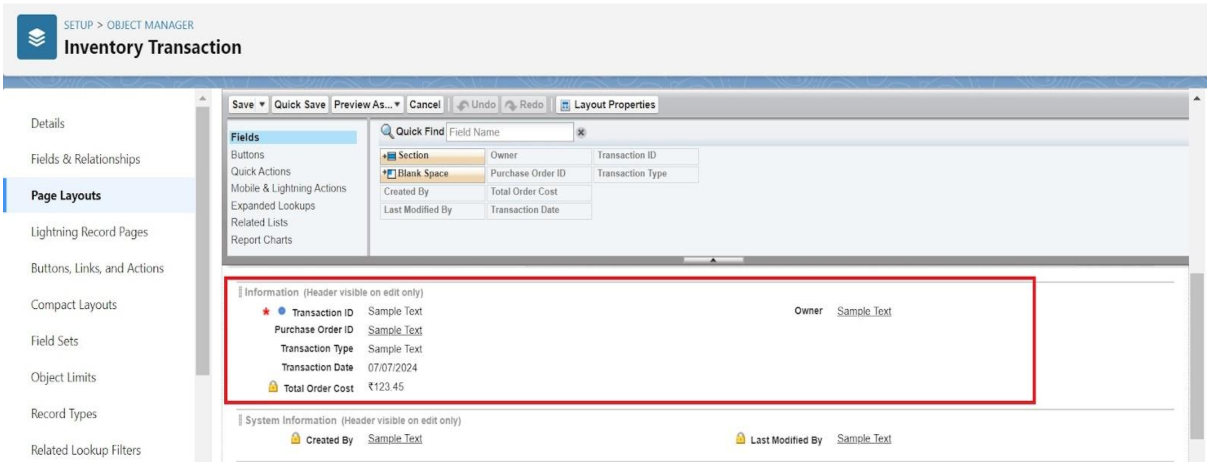


ACTIVITY 4: TO EDIT A PAGE LAYOUT IN INVENTORY TRANSACTION OBJECT

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.

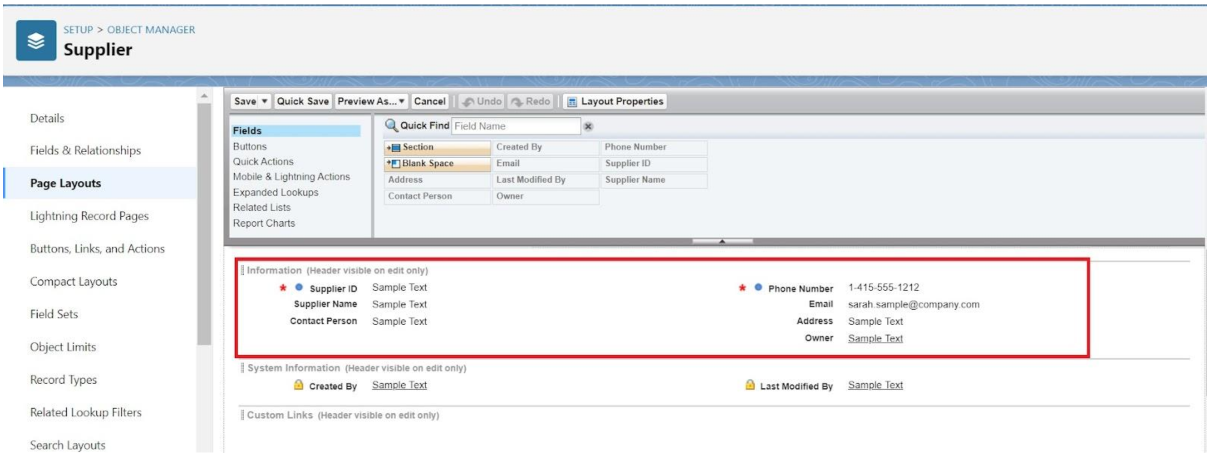
2. Click on the Inventory Transaction Layout

3. Drag and Arrange the field as shown below



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.

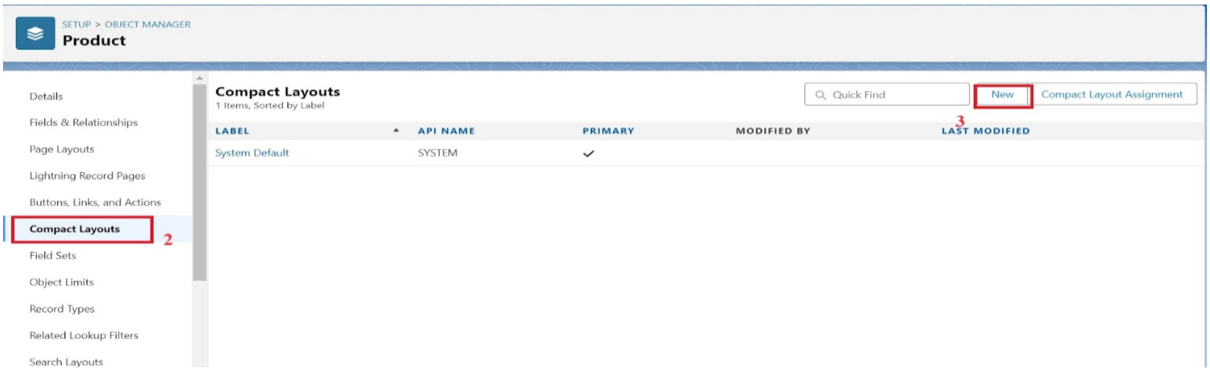
6. Click Save.

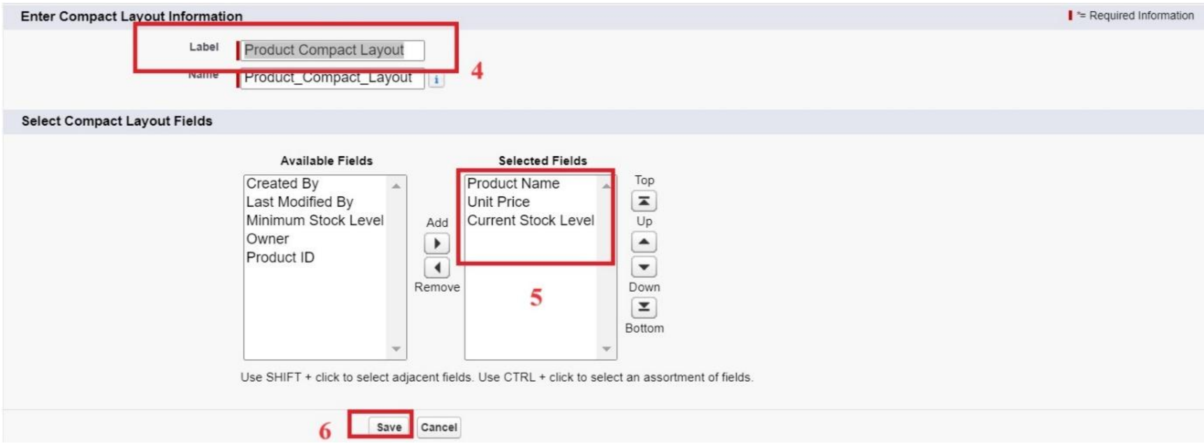
7. Click Compact Layout Assignment.

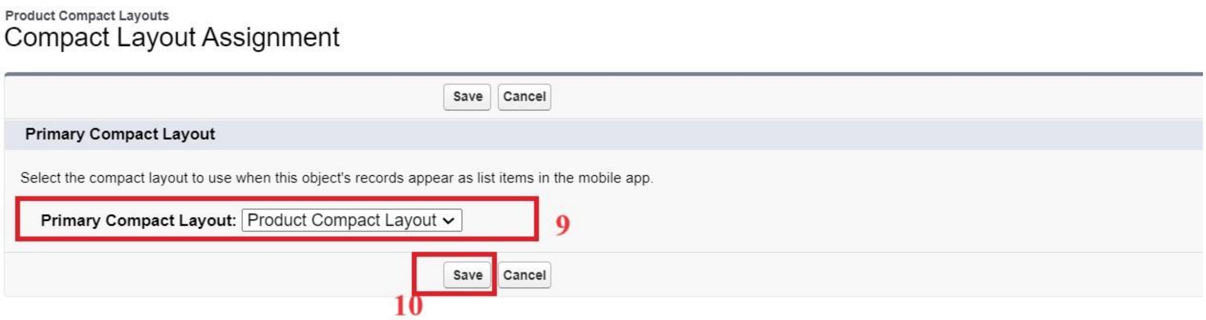
8. Click Edit Assignment.

9. Choose "Product Compact Layout" from the dropdown.

10. Click Save.

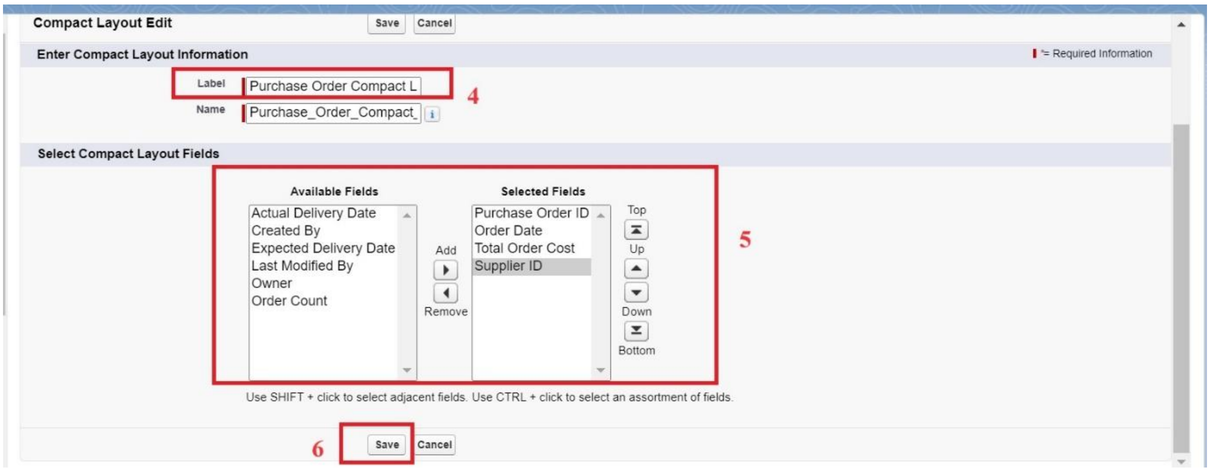


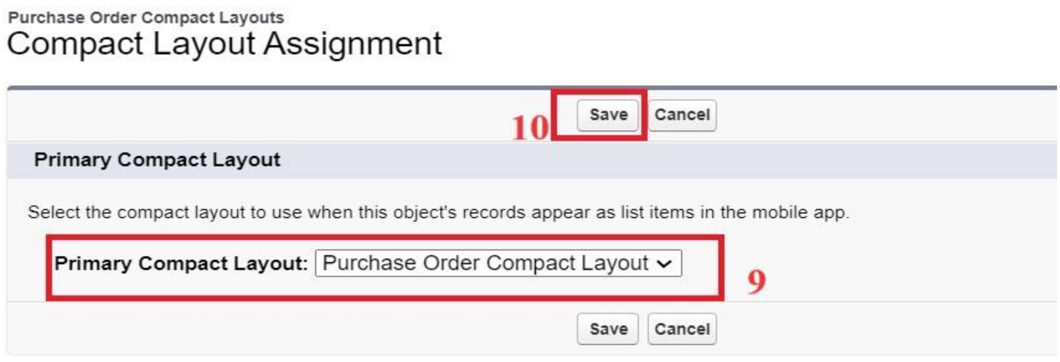




ACTIVITY 2: TO CREATE A COMPACT LAYOUT TO A PURCHASE ORDER OBJECT

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.



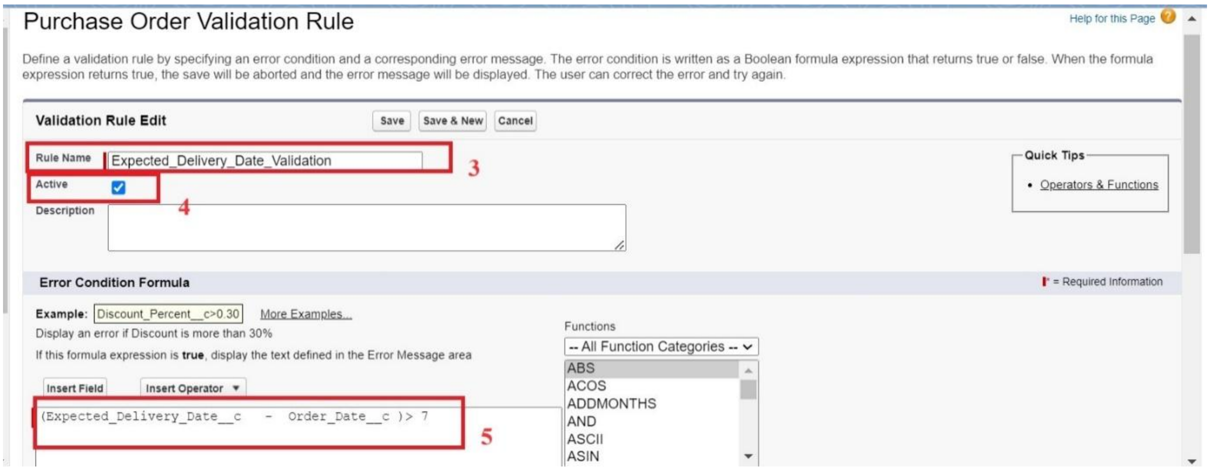


We need to create an Purchase Order Compact Layout in the salesforce like activity 1

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



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

7. Select the Error location as Top of Page

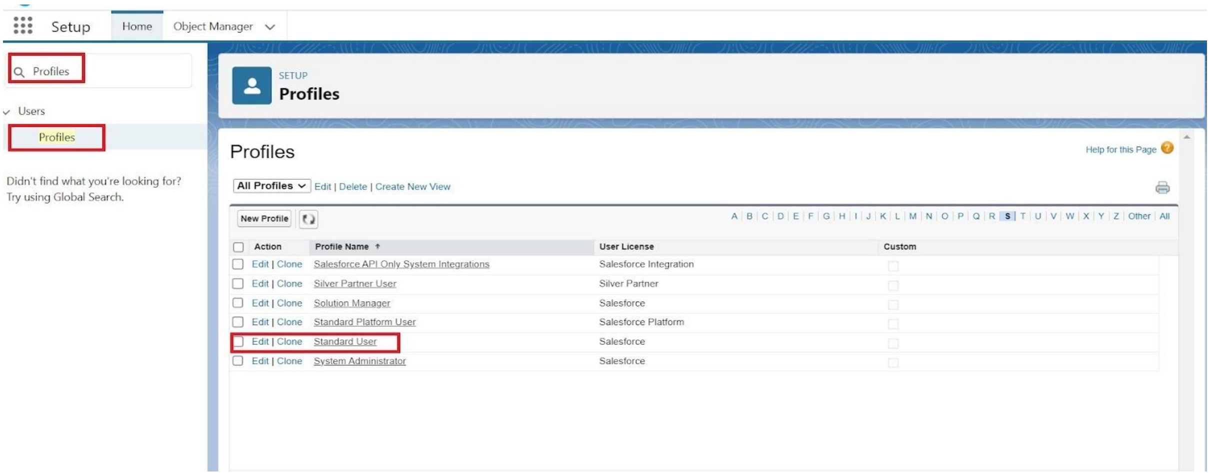
8. Click Save.

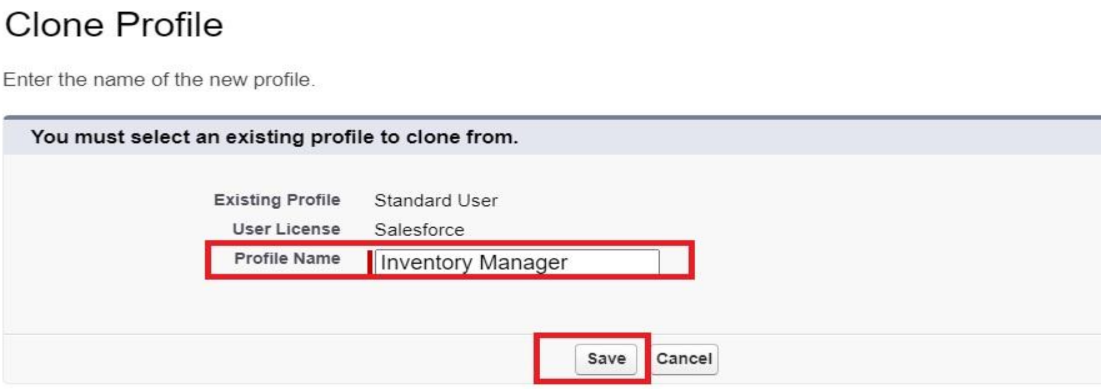
Validation rules in Salesforce are used to ensure data integrity by preventing users from saving invalid data in records. They consist of a formula or expression that evaluates the data in one or more fields and return a value of true or false.

MILESTONE 9 – PROFILES

ACTIVITY 1: TO CREATE AN INVENTORY MANAGER PROFILE

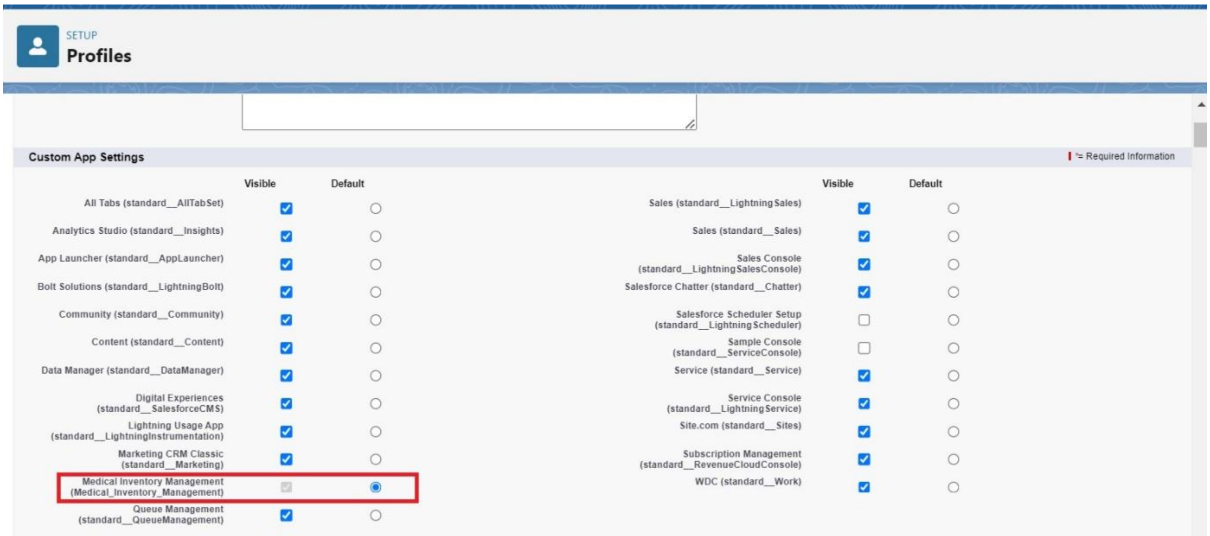
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Inventory Manager) >> Save.



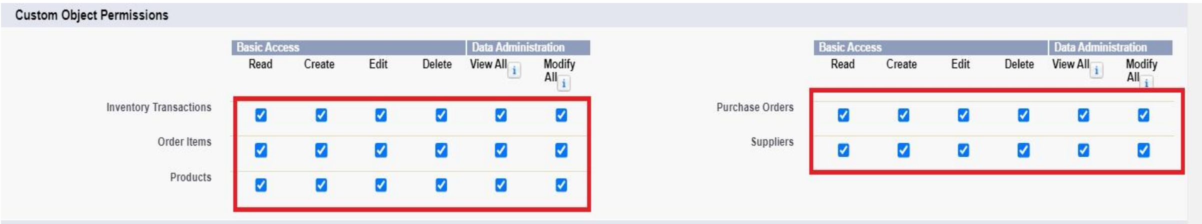


2. While still on the profile page, then click Edit.

3. Select the Custom App settings as default for the Medical Inventory Management.



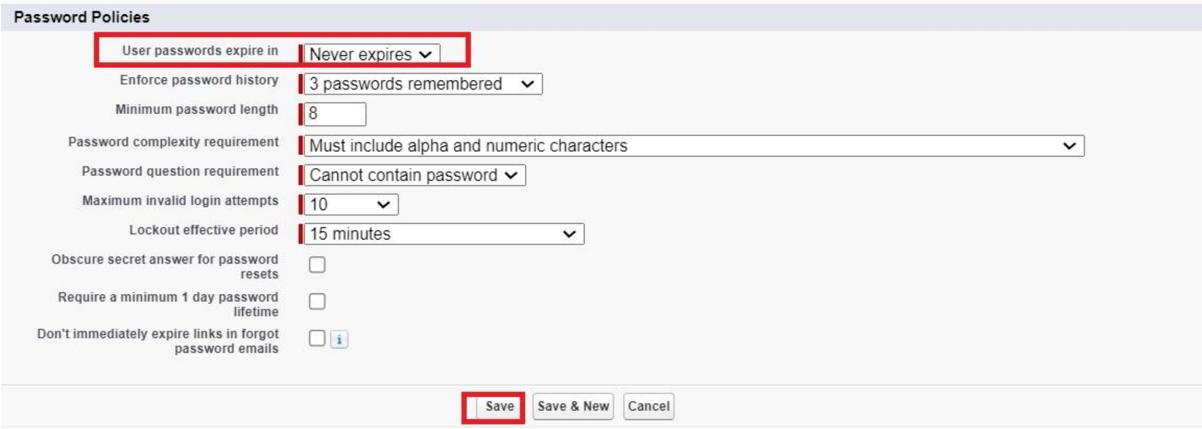
4. Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.



5. Change the password policies as mentioned :

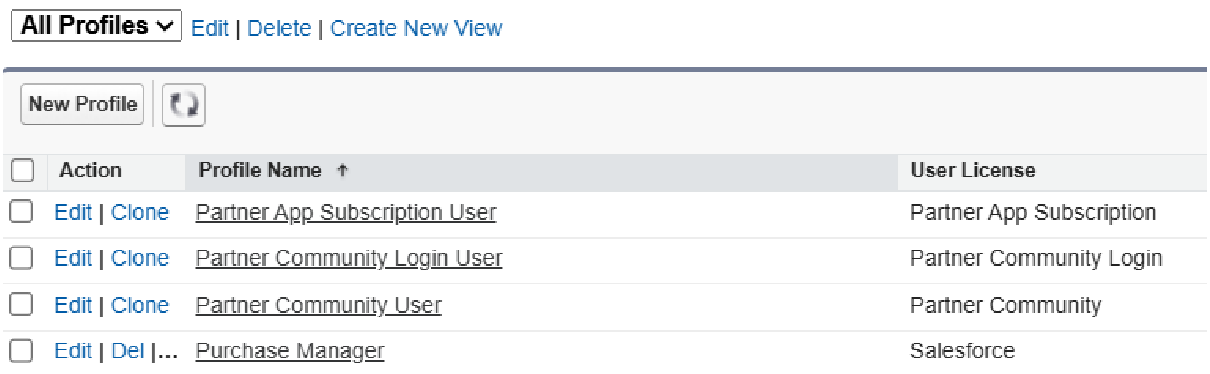
6. User passwords expire in should be " never expires ".

7. Minimum password length should be " 8 ", and click save.



ACTIVITY 2: TO CREATE AN PURCHASE MANAGER PROFILE

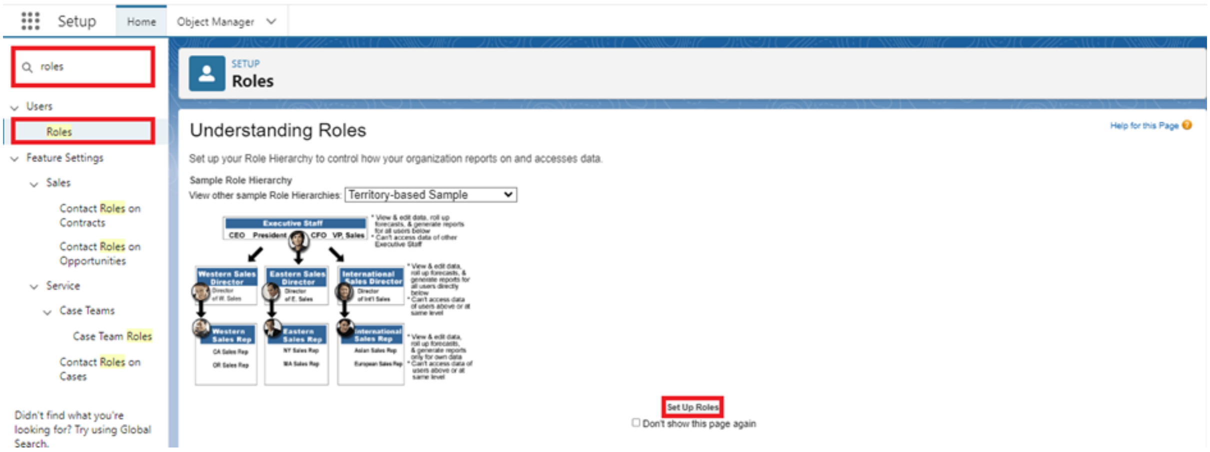
IN THIS CREATING AN PURCHASE MANAGER PROFILE IS SAME LIKE ACTIVITY 1



MILESTONE 10 - ROLES

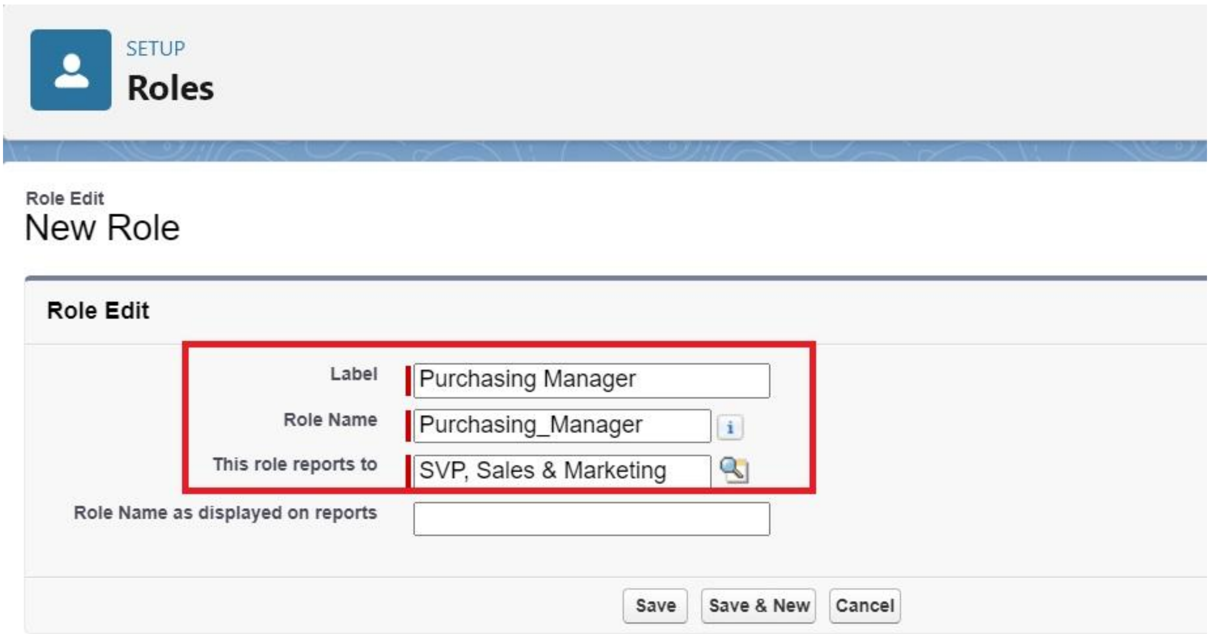
ACTIVITY 1 : CREATE A PURCHASING MANAGER ROLE.

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



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

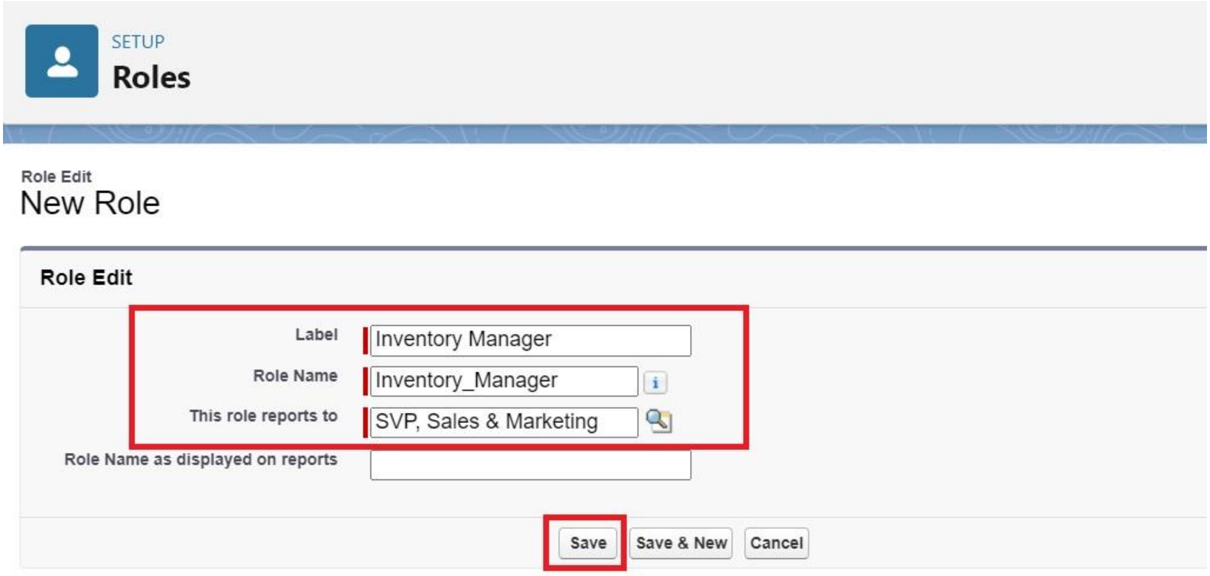
Give Label as "Purchasing Manager" and Role name gets auto populated. Then click on Save.



ACTIVITY 2 : CREATE A PURCHASING MANAGER ROLE.

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

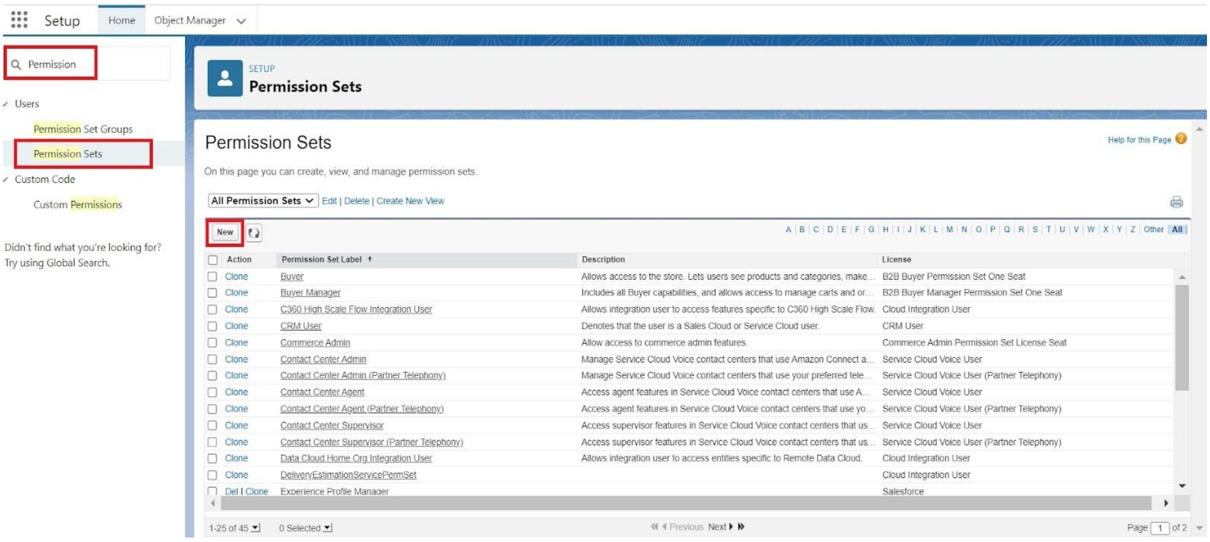
3. Give Label as “Inventory Manager” and the Role name gets auto populated. Then click on Save.



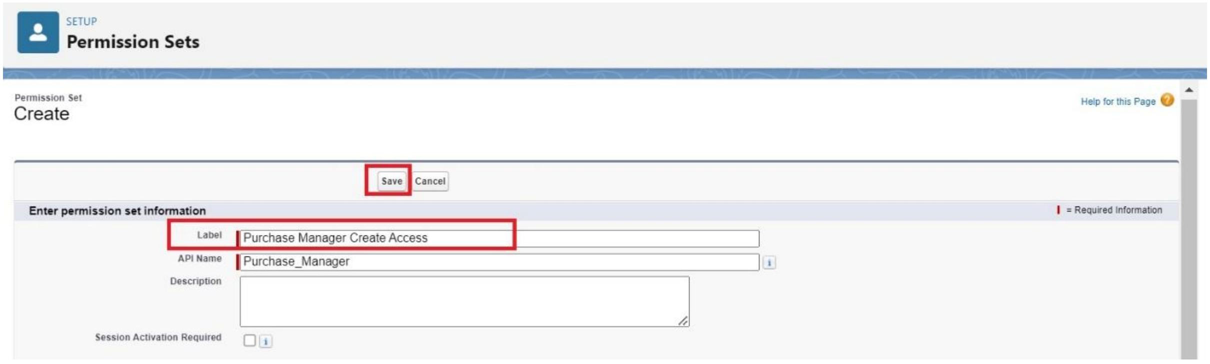
MILESTONE 12 - PERMISSION SETS

ACTIVITY 1 : CREATE A PERMISSION SET.

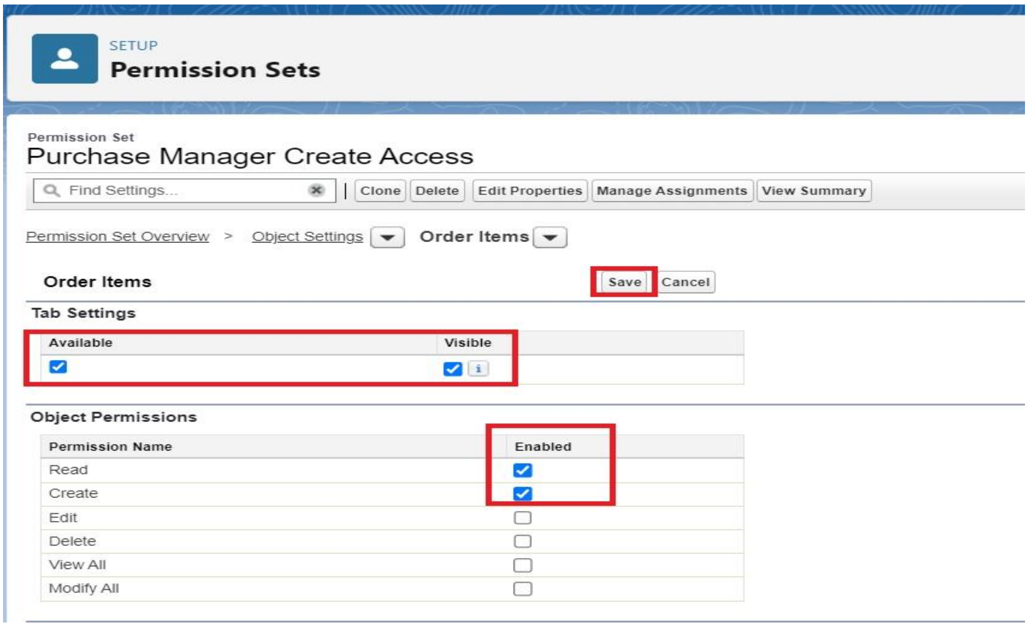
1. Go to setup >> type Permission in quick find box >> Select Permission Set >>
2. click on New.



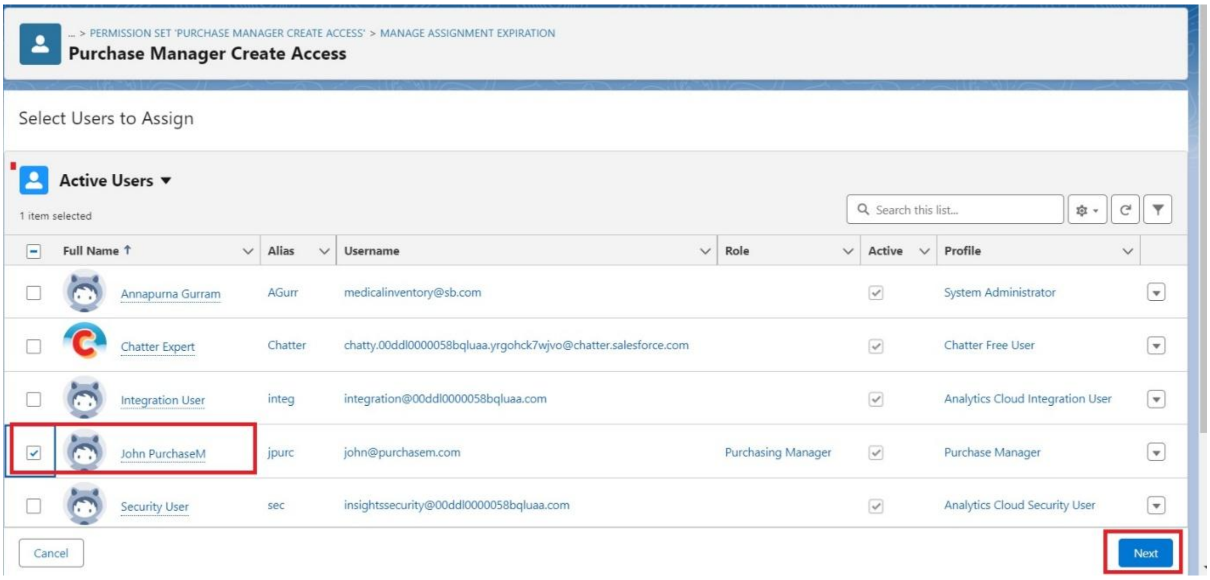
2. Enter Label as Purchase Manager Create Access >> Click on Save.



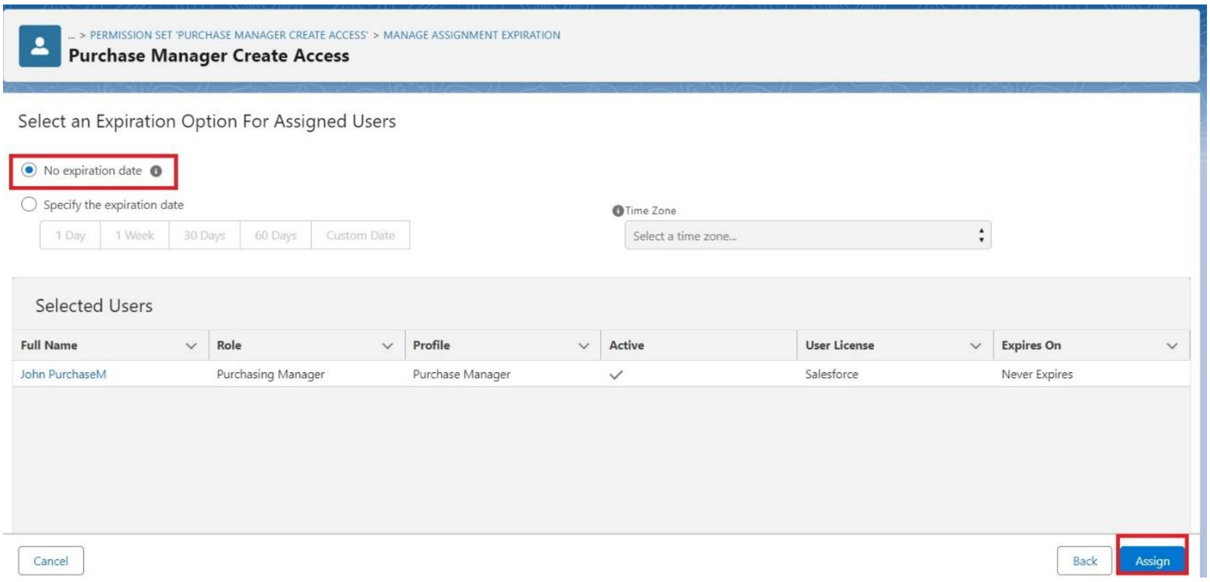
3. From Object Settings >> Select Order Item >> Enable for both Tab Available and Visible >> Enable Read and Create in Object Permissions >> Click on Save.



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.

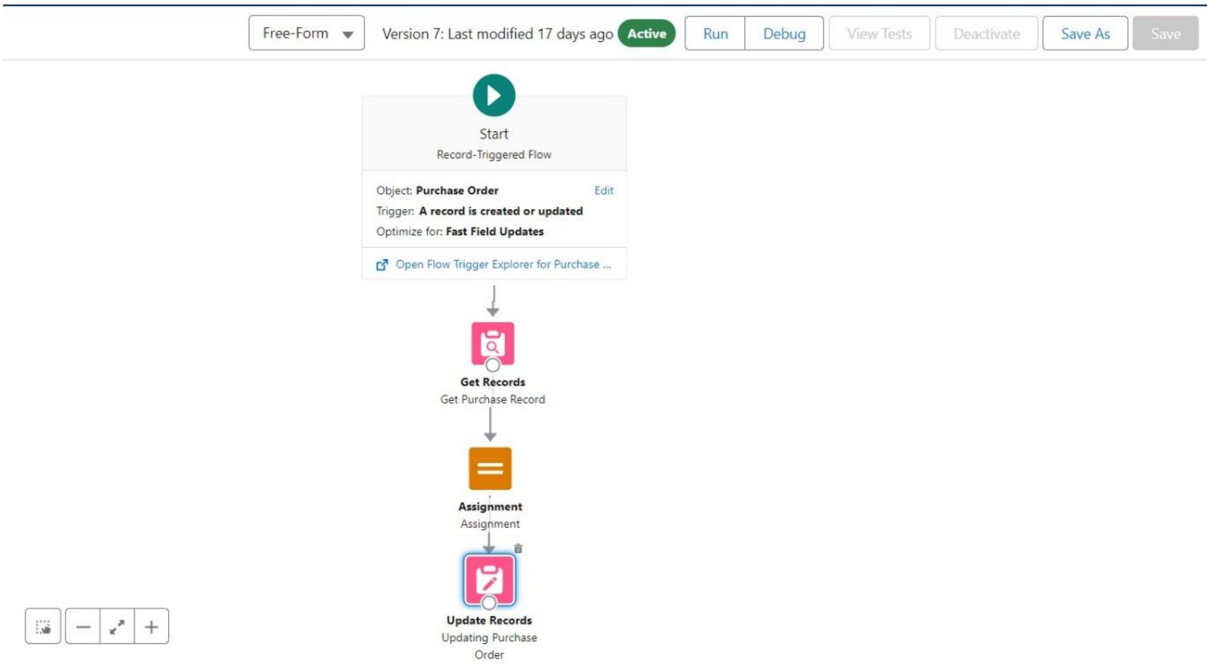


5. Select No Expiration date >> Click on Assign.



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.

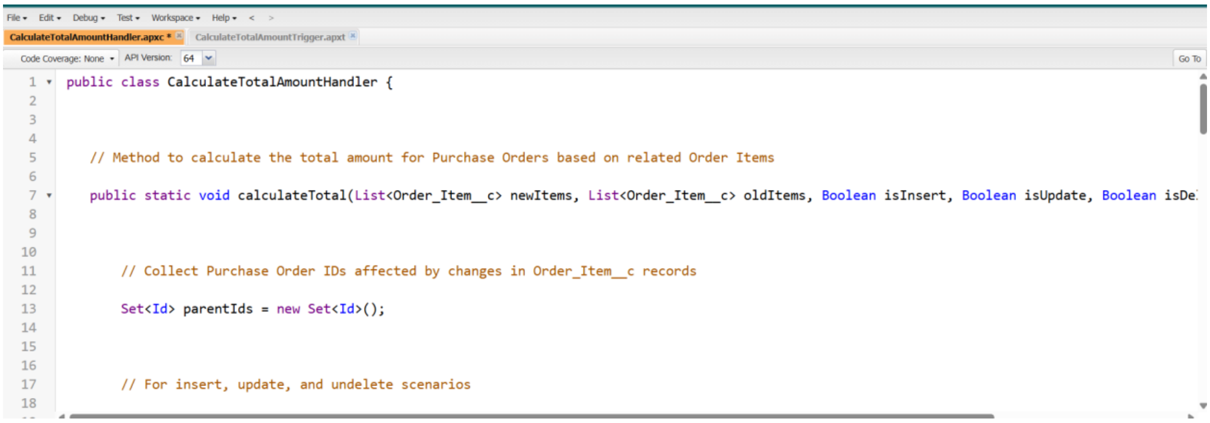
ii)Click on Developer Console: Click on the "Developer Console" option from the Setup menu.   This will open the Developer Console in a new browser tab or window.

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.



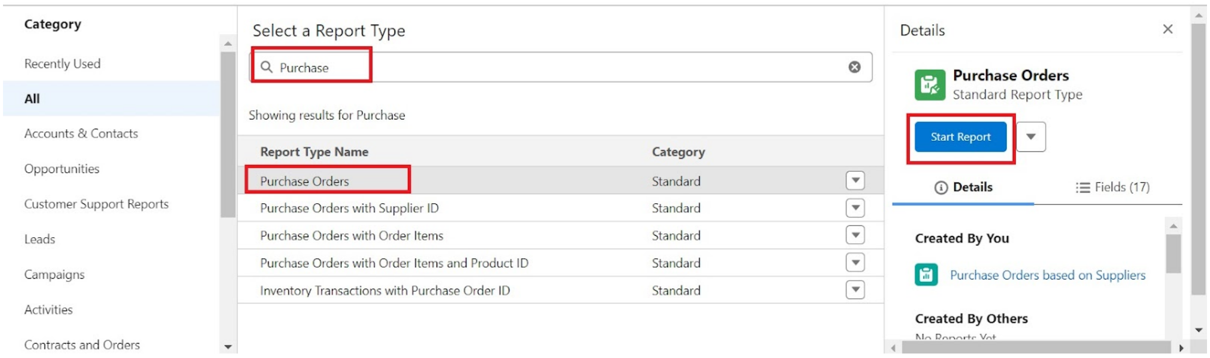
Save it.

MILESTONE 15 - REPORTS

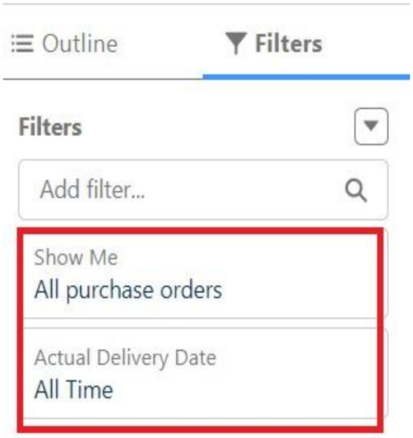
ACTIVITY 1: CREATE A PURCHASE ORDERS BASED ON SUPPLIERS(SUMMARY) REPORT

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.

Create Report



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



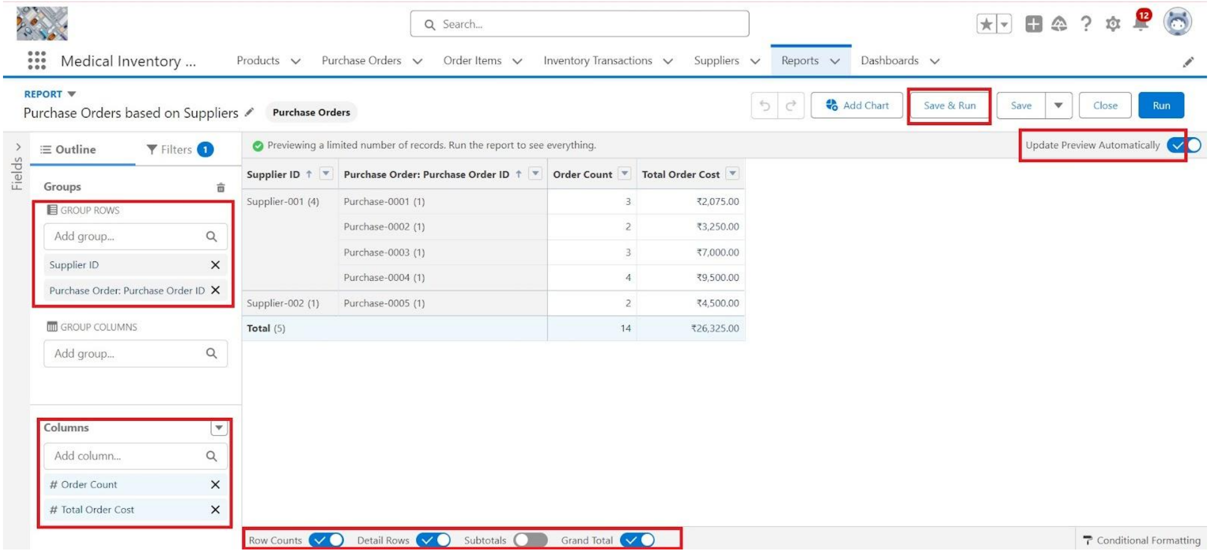
7. Customize your report, in group rows select – Supplier ID, Purchase Order: Purchase Order ID, for columns Order Count, Total Order Cost (In this way we are making a Summary Report).

8. Click save and run
9. Give report name – Purchase Orders based on Suppliers.

10. Click Save

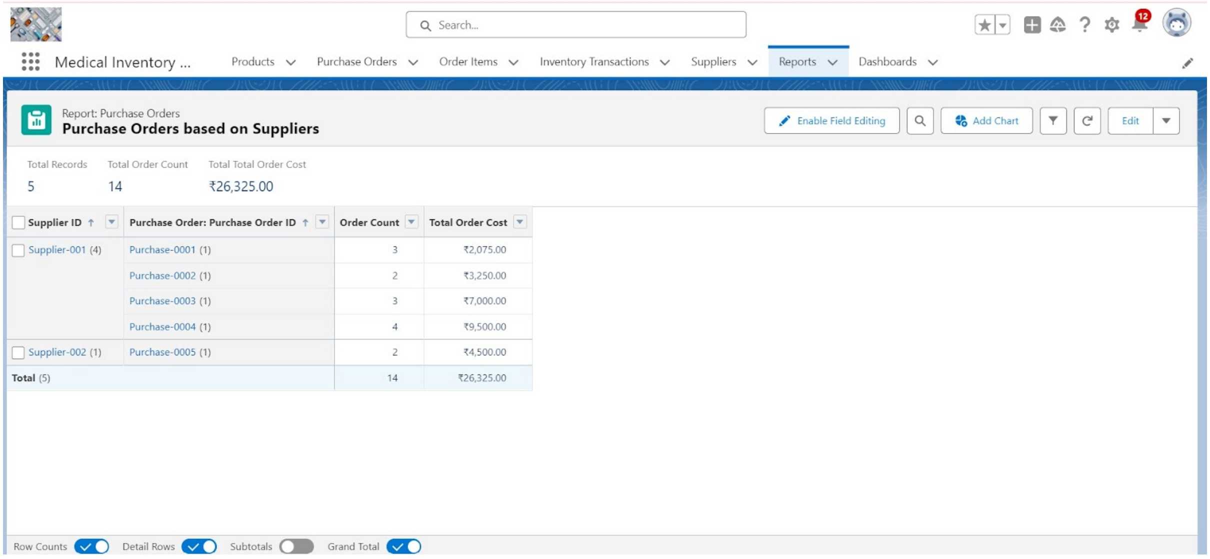
NOTE: In this report you can see your all record of the object you selected for reporting

(What you selects in “Select a report type option”)



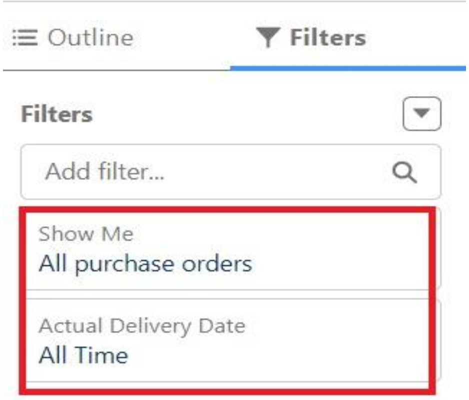
View Report

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.



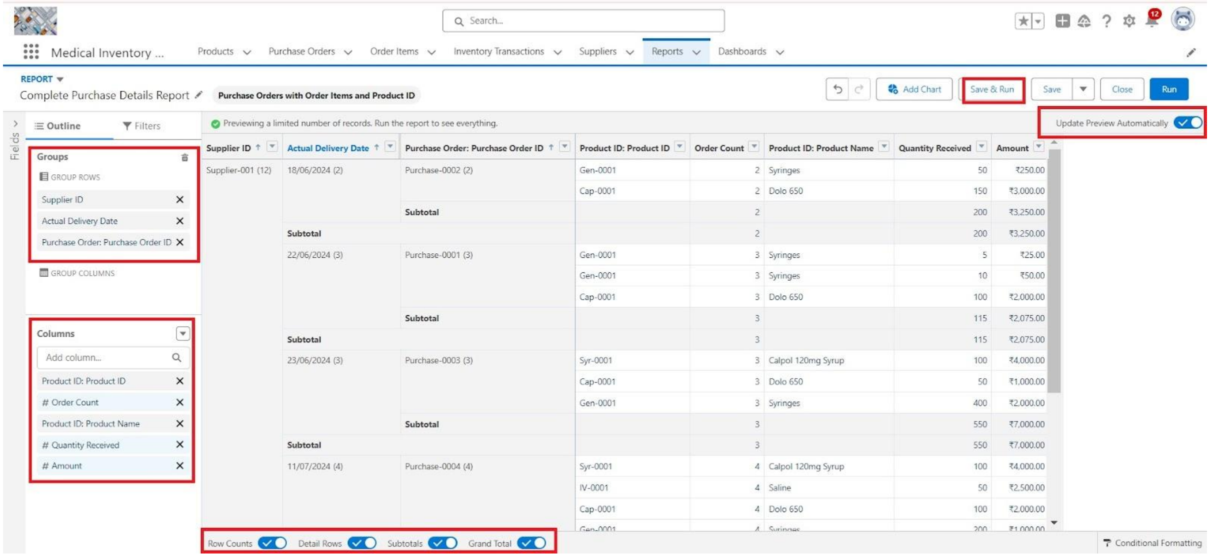
ACTIVITY 2: CREATE A COMPLETE PURCHASE DETAILS REPORT

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).

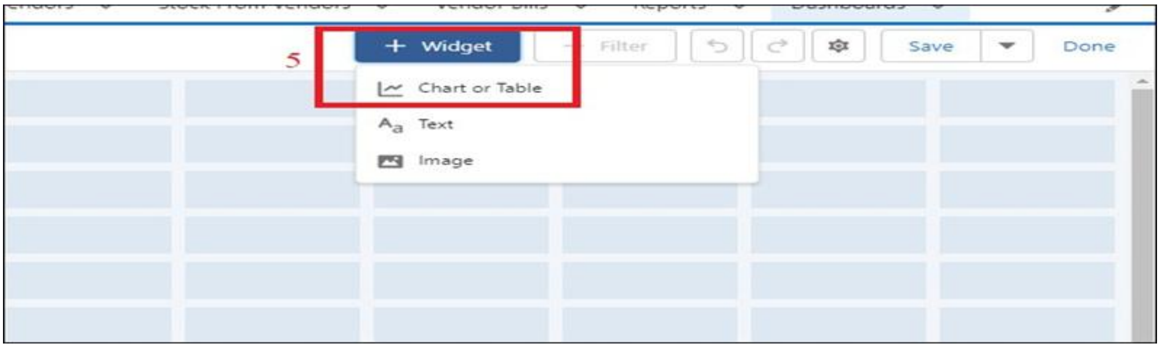
8. Click save and run
9. Give report name – Complete Purchase Details Report
10. Click Save



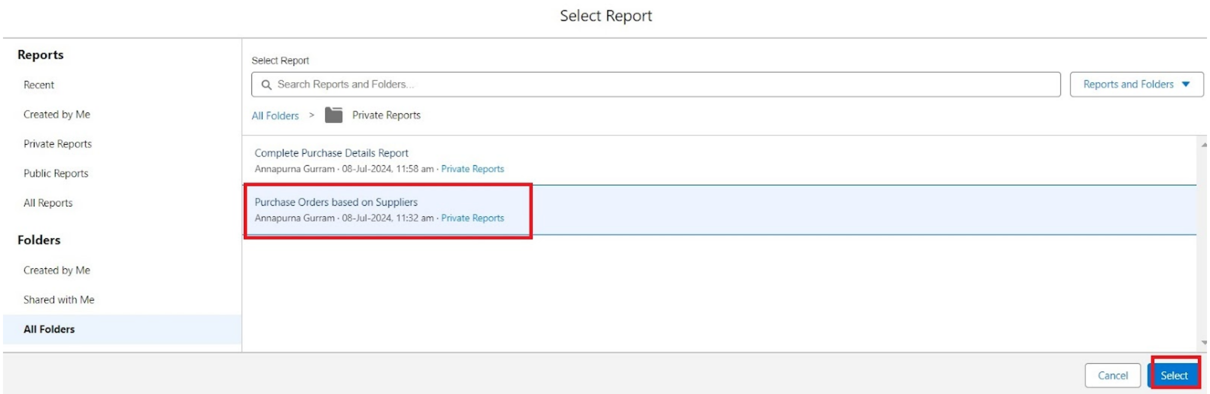
MILESTONE 16 – DASHBOARDS

ACTIVITY 1: - CREATE DASHBOARD

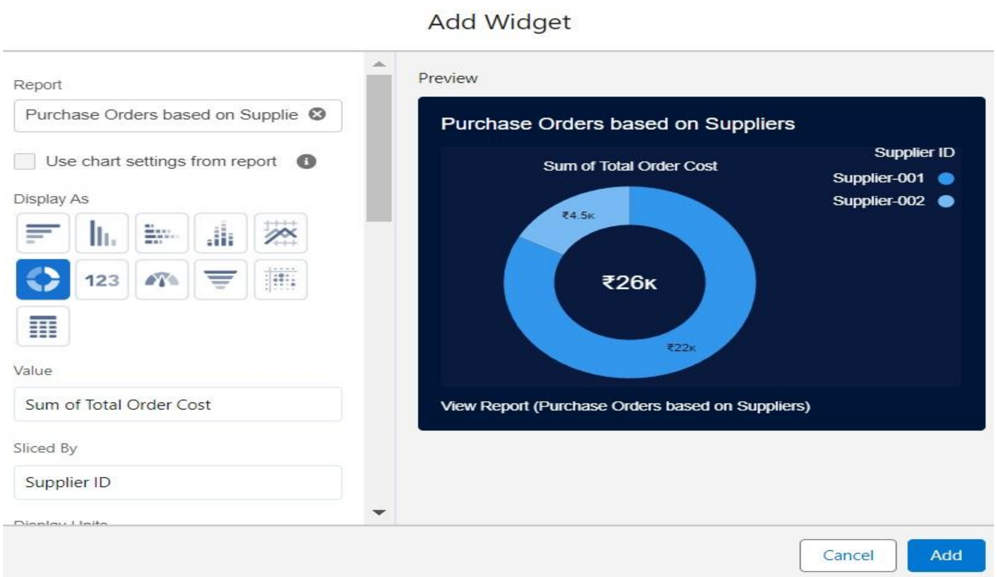
1. Click on the Dashboards tab from the Medical Inventory Management application.
2. Click on the new dashboard.
3. Give name - Medical Inventory DashBoard
4. Click create
5. Click on +widget
6. Select the Purchase Orders based on Suppliers Report
7. For the data visualization select any of the charts,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



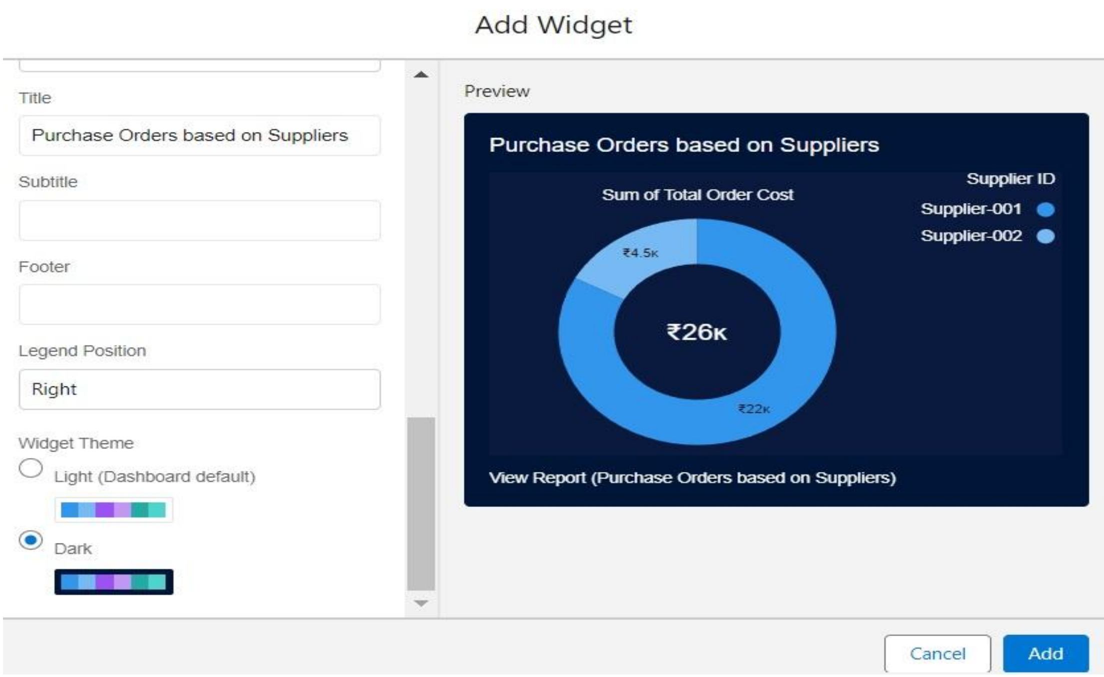
5
Widget
Filter
Save
Done
Chart or Table
Text
Image



Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Created by Me
Shared with Me
All Folders
Select Report
Search Reports and Folders...
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
Use chart settings from report
Display As
123
Value
Sum of Total Order Cost
Sliced By
Supplier ID
Preview
Purchase Orders based on Suppliers
Sum of Total Order Cost
Supplier ID
Supplier-001
Supplier-002
₹4.5K
₹26K
₹22K
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