

# **MEDICAL INVENTORY MANAGEMENT**

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**College Name:** Navarasam Arts and Science College for Women-Arachalur

## **TEAM MEMBERS:-**

**TEAM LEADERNAME:** S.Haridharani

Email:[haridharani2909@gmail.com](mailto:haridharani2909@gmail.com)

**TEAM MEMBERNAME:** K.Santhyia

Email:[santhiyakrishna24@gmail.com](mailto:santhiyakrishna24@gmail.com)

**TEAM MEMBERNAME:** P.Dhivya

Email:[dhivyadinesh19743@gmail.com](mailto:dhivyadinesh19743@gmail.com)

**TEAM MEMBERNAME:**A.Mahalakshmi

Email:[maharani6374017@gmail.com](mailto:maharani6374017@gmail.com)

## **Introduction**

## **Project Overview**

Medical inventory mismanagement often leads to shortages of essential medicines or surplus stock going unused. This project uses Sales force CRM to build an application that manages the procurement, storage, and distribution of medical supplies. The system connects suppliers, hospitals, pharmacies, and administrators to streamline the supply chain. With the help of custom objects, flows, triggers, and reports, the process is automated and transparent. The project demonstrates how technology can be

applied to ensure efficient medical inventory management and support better healthcare services.

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## Objectives

- **Enhance Medical Supply Distribution Efficiency:** Enable real-time tracking of medicine procurement, stock levels, and delivery to healthcare facilities.
- **Ensure Transparency:** Maintain accurate records of suppliers, purchase orders, and medical inventory usage.
- **Improve Resource Coordination:** Automate purchase requests, restocking alerts, and task assignments for medical staff.
- **Optimize Inventory Management:** Track medicines, equipment, and consumables to avoid shortages or wastage.
- **Enhance Real-Time Visibility:** Provide live updates of stock availability, pending orders, and delivery status for administrators.
- **Promote Healthcare Impact:** Build a transparent and efficient system that ensures essential medical supplies are always available to serve patients.

## Student Outcomes

- **Hands-on Experience with Inventory Automation:** Students gain practical skills in configuring Sales force objects, automating workflows, and managing real-time stock tracking.
- **Understanding of Project Lifecycle in Healthcare CRM:** Students learn the end-to-end process from requirement gathering to deployment, enhancing their ability to execute real-world Sales force projects.
- **Enhanced Analytical and Problem-Solving Skills:** Students develop the ability to identify operational challenges in medical supply management, design solutions, and troubleshoot issues effectively.

- **Improved Collaboration Skills:** Students gain experience working as a team, coordinating tasks like requirement gathering, development, and testing.
  - **Industry-Relevant Exposure:** Students get exposure to real-world use cases of Sales force CRM in healthcare management, preparing them for future career opportunities.
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## System Requirements

### Hardware Requirements

- Computer with minimum 4 GB RAM, Dual-core processor
- Stable internet connection

### Software Requirements

- Sales force Developer Edition Org
- Modern Web Browser (e.g., Google Chrome, Firefox)

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# Project Duration: 31 Hours

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## Phases Overview

Phase No.	Phase Name	Description	Page Numbers
1	<b>Requirement Analysis &amp; Planning</b>	Gathering requirements from suppliers, hospitals, and pharmacies; defining scope and goals; planning data model and workflows.	5
2	<b>Sales force Development – Backend &amp; Configurations</b>	Creating custom objects, fields, relationships; setting up Flows and Apex Triggers for automation.	5-11
3	<b>UI/UX Development &amp; Customization</b>	Building Lightning App, customizing layouts, adding fields, implementing Flows, and developing UI logic.	11-24
4	<b>Data Migration, Testing &amp; Security</b>	Creating Users, Profiles, Public Groups, Sharing Rules; configuring Report Types, Reports, Dashboards; testing functionalities and ensuring data security.	24-31
5	<b>Deployment, Documentation &amp; Maintenance</b>	Designing and finalizing Home Page, deploying solution to live environment, preparing documentation, conclusion, and ongoing system maintenance.	31-35

## Phase 1: Requirement Analysis & Planning

### Medical Inventory Management:

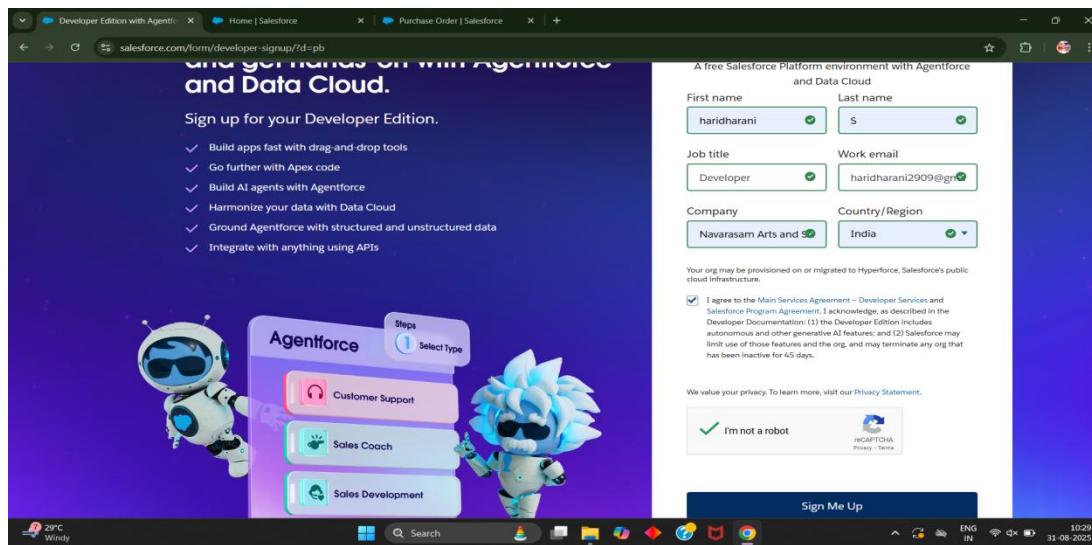
Utilizing Sales force, our project streamlines the procurement, tracking, and distribution of medical supplies, ensuring efficiency, transparency, and uninterrupted availability of essential healthcare resources.

## Phase 2: Salesforce Development – Backend & Configuration

### Milestone1: Salesforce Account

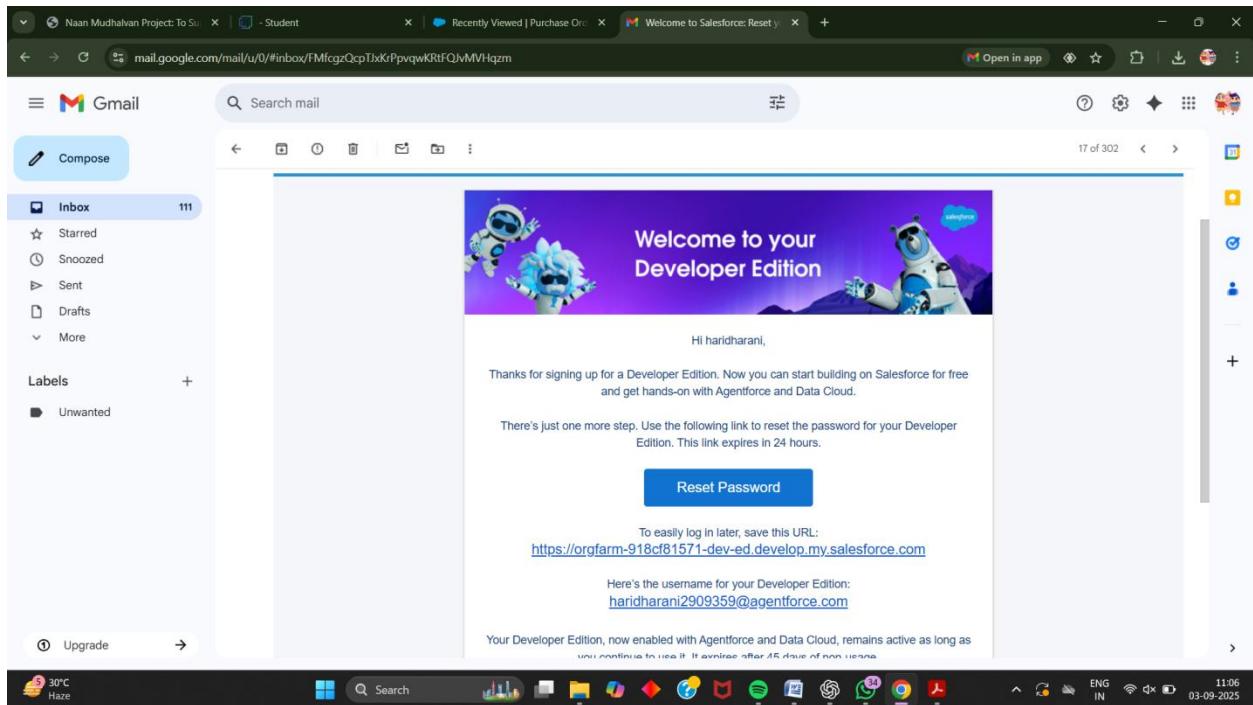
#### Activity 1: Creating developer account

1. Go to <https://developer.salesforce.com/signup>
2. Fill the details in sign up page.



## Activity 2: Account Activation

Go to the inbox in your mail and in this mail give the reset password.



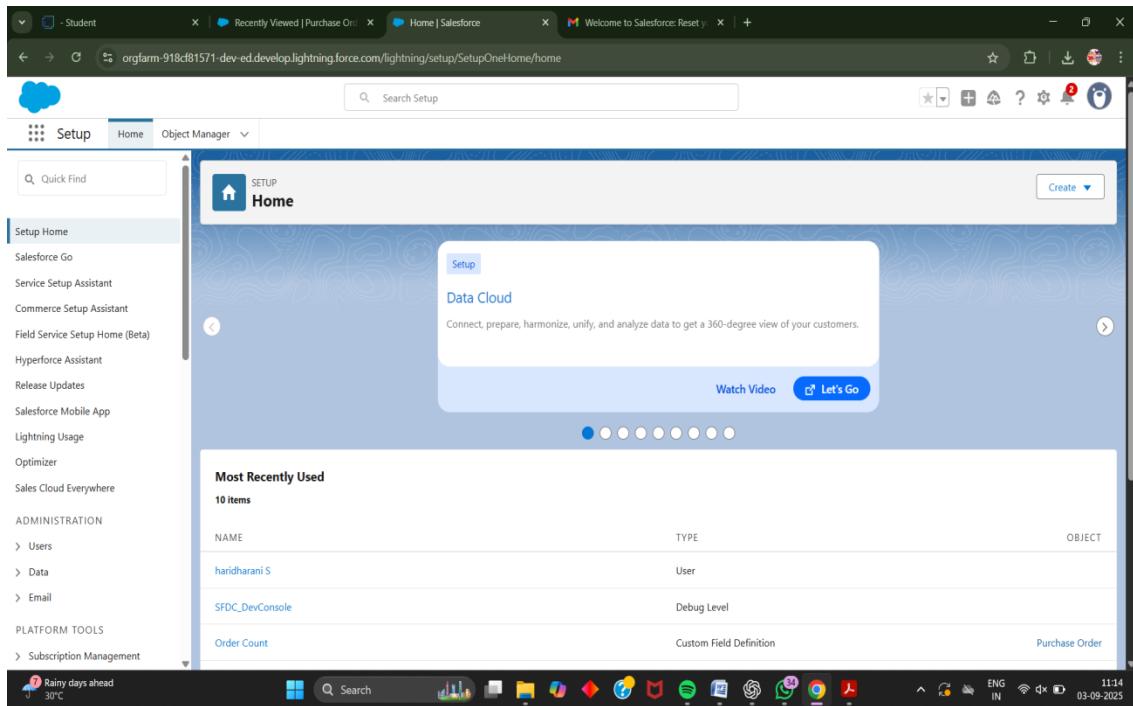
Enter the new password and confirm password with security question.

## Milestone 2: Objects

### Activity 1: Creating a product object

1. Go to setup page, click object manager in that click custom object

## 2. Enter the label name as Product.



Similarly create the Purchase Order, Order Items, Inventory Transaction, Supplier objects.

A screenshot of the Salesforce Object Manager page. The top navigation bar shows "Object Manager | Salesforce". The main content area displays a table of objects, with a search bar at the top right containing "product". The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The data includes:

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	Product2	Standard Object			
Product Attribute	ProductAttribute	Standard Object			
Product Attribute Set Product	ProductAttributeSetProduct	Standard Object			
Product Category Product	ProductCategoryProduct	Standard Object			
Product Consumption Schedule	ProductConsumptionSchedule	Standard Object			
Productt	Productt_c	Custom Object		8/30/2025	✓

The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains "Purchase Order". A table below lists one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Purchase Order	Purchase_order__c	Custom Object		8/30/2025	✓

The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains "Order Item". A table below lists five items:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Fulfillment Order Item Adjustment	FulfillmentOrderItemAdjustment	Standard Object			
Fulfillment Order Item Tax	FulfillmentOrderItemTax	Standard Object			
Order Item	Order_Item__c	Custom Object		8/30/2025	✓
Return Order Item Adjustment	ReturnOrderItemAdjustment	Standard Object			
Return Order Item Tax	ReturnOrderItemTax	Standard Object			

The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains "Inventory Transaction". A table below lists one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Inventory Transaction	Inventory_Transaction__c	Custom Object		8/30/2025	✓

The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for 'Home | Salesforce', 'Object Manager | Salesforce', and '- Student'. Below the tabs is a search bar labeled 'Search Setup'. The main area is titled 'Object Manager' with a sub-header 'SETUP'. It displays a table with one item: 'Supplier' (Label), 'Supplier\_\_c' (API Name), 'Custom Object' (Type), and '8/30/2025' (Last Modified). There is also a 'DEPLOYED' column with a checkmark. A search bar at the top right contains 'Supplier', and buttons for 'Schema Builder' and 'Create' are visible. The bottom of the screen shows a taskbar with various icons and system status.

## Activity 2: Account Activation

Go to the inbox in your mail and in this mail give the reset password.

The screenshot shows a Gmail inbox with 111 unread messages. The main window displays an email from Salesforce with the subject 'Welcome to your Developer Edition'. The email body includes a greeting 'Hi haridharani,' and a message about signing up for a Developer Edition. It provides a 'Reset Password' button and a URL: <https://orgfarm-918cf81571-dev-ed.develop.my.salesforce.com>. The email also mentions a username: 'haridharani2909359@agenforce.com'. The bottom of the email states that the developer edition remains active as long as it's used. The taskbar at the bottom shows various application icons and system status.

Enter the new password and confirm password with security question.

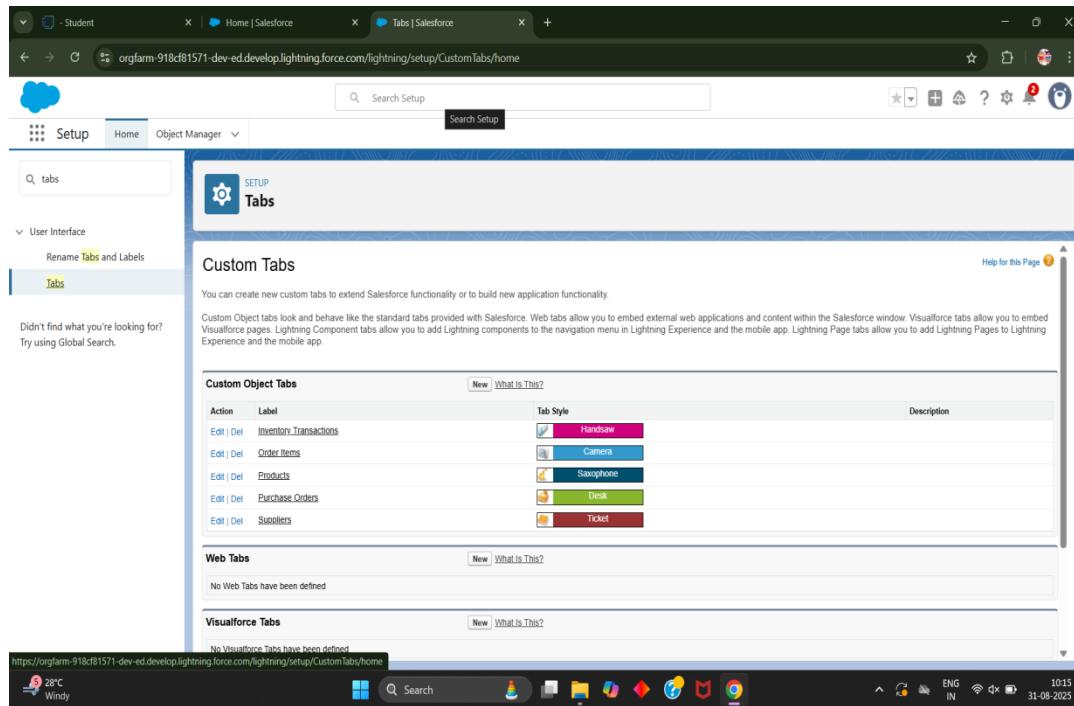
## Milestone 3: Tabs

### Activity 1: Creating A Tab for product object

1. In set up, quick find box search for Tabs click Tabs.
2. Click New in tabs.
3. Select Product as object and Select tab style.
4. Click Next, Next and uncheck the include tab.
5. Click Save.

### Activity 2: Creating remaining tabs

Similar to activity1 create the tab for Purchase Order, Order Items, Inventory Transaction, Supplier objects.



## Phase 3: UI/UX Development & Customization

### Milestone 4: The Lightning App

#### Activity 1: Create a Lightning App for Medical Inventory Management

1. In set up, quick find box search for App Manager.
2. Click New Lightning App.
3. Enter App Name as Medical Inventory Management and upload image.
4. In Navigation Items, Select Products, Purchase Order, Order Items, Inventory Transaction, Supplier, Reports, Dashboard.
5. In User Profiles, Select System Administration.

The screenshot shows the Salesforce App Manager interface. At the top, there's a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. A search bar is located above the main content area. The main area displays a table titled 'Lightning Experience App Manager' with 27 items. The columns are: App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The table lists various apps like Data Manager, Digital Experiences, and Sales. On the left, there's a sidebar with sections for 'Apps' (selected), 'External Client Apps', and a search bar. A message at the bottom left says 'Didn't find what you're looking for? Try using Global Search.' The bottom of the screen shows the Windows taskbar with icons for File Explorer, Task View, and other applications.

App Name ↑	Developer Name	Description	Last Modified ...	App ...	Visi... ▾
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	8/20/2025, 3:36 AM	Lightning	✓
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	8/20/2025, 3:36 AM	Lightning	✓
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	8/20/2025, 3:36 AM	Lightning	✓
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	8/20/2025, 3:36 AM	Classic	✓
14 Medical Inventory Management	Medical_Inventory_Management		8/30/2025, 2:11 AM	Lightning	✓
15 My Service Journey	MSIApp	Discover new customer service capabilities.	8/20/2025, 3:36 AM	Lightning	✓
16 Platform	Platform	The fundamental Lightning Platform	8/20/2025, 3:36 AM	Classic	✓
17 Queue Management	QueueManagement	Create and manage queues for your business.	8/20/2025, 3:36 AM	Lightning	✓
18 Sales	Sales	The world's most popular sales force automation (SFA) solution	8/20/2025, 3:36 AM	Classic	✓
19 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and m...	8/20/2025, 3:36 AM	Lightning	✓
20 Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	8/20/2025, 3:36 AM	Lightning	✓
21 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on o...	8/20/2025, 3:36 AM	Lightning	✓
22 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	8/20/2025, 3:36 AM	Classic	✓
23 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	8/20/2025, 3:38 AM	Lightning	✓

## **Milestone 5: Fields**

### **Activity 1: Creating a Text field in Product object**

1. In set up, go to object manager.
2. Search for Product object, Click Fields & Relationship and then New
3. Select data type as text and field name as Product Name and length as 255, check the required box and Next, Next, save.

### **Activity 2: Creating a TextArea field in Product object**

1. In set up, go to object manager.
2. Search for Product object, Click Fields & Relationship and then New
3. Select data type as TextArea and field name as Product Description and check the required box and Next, Next, save.

### **Activity 3: Creating a Number field in Product object**

1. In set up, go to object manager.
2. Search for Product object, Click Fields & Relationship and then New.
3. Select data type as Number and field name as Current Stock Level and length-18, decimal place-0 check the required box.
4. Click on Next, Next, save.

### **Activity 4: Creating a currency field in Product object**

1. In set up, go to object manager.
2. Search for Product object, Click Fields & Relationship and then New
3. Select data type as Currency and field name as Unit Price and length-16, Decimal place-2, check the required box.
4. Click on Next, Next, save.

The screenshot shows the Salesforce setup interface for the Product object. The left sidebar has 'Fields & Relationships' selected. The main area displays a table of fields:

	Field Label	Type
Created By	CreatedBy	Lookup(User)
Current Stock Level	Current_Stock_Level_c	Number(18, 0)
Expiry Date	Expiry_Date_c	Date
Last Modified By	LastModifiedBy	Lookup(User)
Minimum Stock Level	Minimum_Stock_Level_c	Number(18, 0)
Owner	OwnerId	Lookup(User,Group)
Product Description	Product_Description_c	Text Area(255)
Product Id	Name	Text(80)
Product Name	Product_Name_c	Text(255)
<b>Unit Price</b>	<b>Unit_Price_c</b>	<b>Currency(16, 2)</b>

## Activity 5: Creating a Lookup relationship in Purchase Order object

1. In set up, go to object manager.
2. Search for Purchase Order object, Click Fields & Relationship and then New
3. Select data type as Lookup relationship and Select the related object as Supplier, field name as Supplier ID, check the required box.
4. Click on Next, Next, save.

## Activity 6: Creating a Date field in Purchase Order object

1. In set up, go to object manager.
2. Search for Purchase Order object, Click Fields & Relationship and then New
3. Select data type as Date and field name as Order Date
4. Click on Next, Next, save.

## Activity 7: Creating a Roll-up summary field in Purchase order object

1. In set up, go to object manager.
2. Search for Purchase Order object, Click Fields & Relationship and then New
3. Select data type as Roll-up relationship and field name as Order Count and Select summary object as Order Items, roll-up type as Count.
4. Click on Next, Next, save.

The screenshot shows the Salesforce Object Manager interface for the 'Order Item' object. The left sidebar lists various setup options like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, among others. The main content area is titled 'Fields & Relationships' and displays a table of existing fields. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The listed fields include:

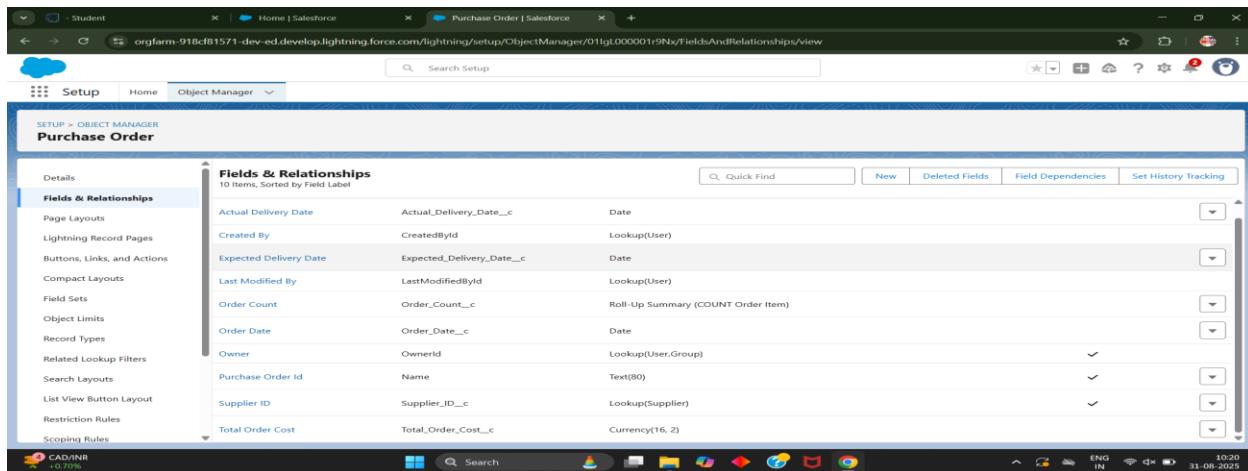
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order Item Id	Name	Text(80)		
Product ID	Product_ID_c	Lookup(Product)		
Purchase Order ID	Purchase_Order_ID_c	Master-Detail(Purchase Order)		
Quantity Ordered	Quantity_Ordered_c	Number(18, 0)		
Quantity Received	Quantity_Received_c	Number(18, 0)		
Unit Price	Unit_Price_c	Formula (Currency)		

## Activity 8: Creating a Unit Price formula field in Order Item object

1. In set up, go to object manager.
2. Search for Order Items object, Click Fields & Relationship and then New
3. Select data type as Formula and field name as Unit Price and Formula return type Currency.
4. Insert Advanced formula: Product\_ID\_\_r.Unit\_Price\_\_c
5. Click on Next, Next, save.

## Activity 9: Creating a Amount Formula fields in Order Item object

1. In set up, go to object manager.
2. Search for Order Items object, Click Fields & Relationship and then New
3. Select data type as Formula and field name as Amount and Formula return type Currency.
4. Insert Advanced formula: Quantity\_Received\_\_c \* Unit\_Price\_\_c
5. Click on Next, Next, save.



## **Activity 10:** Creating a Picklist field in Inventory Transaction object

1. In set up, go to object manager.
2. Search for Inventory Transaction object, Click Fields & Relationship and then New
3. Select data type as Picklist and field name as Transaction Type.
4. Click Enter values, with each value separated by new line, Enter the values following:

Receipt  
Issue  
Adjustment

5. Click on Next, Next, save.

## **Activity 11:** Creating a Total Cost formula field in Inventory Transaction object

1. In set up, go to object manager.
2. Search for Inventory Transaction object, Click Fields & Relationship and then New
3. Select data type as Formula and field name as Total Order Cost and Formula return type Currency.
4. Insert Advanced formula:  
`Purchase_Order_ID__r.Total_Order_Cost__c`
5. Click on Next, Next, save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Student', 'Home | Salesforce', and 'Inventory Transaction | Salesforce'. Below the bar, there's a search bar labeled 'Search Setup' and a toolbar with various icons. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Inventory Transaction'. On the left, a sidebar lists 'Fields & Relationships' under 'Details', with options like 'Page Layouts', 'Lightning Record Pages', and 'Field Sets'. The right side displays a table titled 'Fields & Relationships' with 8 items. The columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data includes fields such as Created By, Inventory Transaction Id, Last Modified By, Owner, Purchase Order ID, Total Order Cost, Transaction Date, and Transaction Type.

## Activity 12: Creating a Phone fields in Supplier object

1. In set up, go to object manager.
2. Search for Supplier object, Click Fields & Relationship and then New
3. Select data type as Phone and field name as Phone Number.
4. Select Required box.
5. Click on Next, Next, save.

## Activity 13: Creating a Email field in Supplier object

1. In set up, go to object manager.
2. Search for Product object, Click Fields & Relationship and then New
3. Select data type as Email and field name as Email
4. Click on Next, Next, save.

**Object Manager - Supplier**

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text Area(255)		
Contact Person	Contact_Person__c	Text(50)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone Number	Phone_Number__c	Phone		
Supplier Name	Supplier_Name__c	Text(60)		
Suppliers Id	Name	Text(80)		✓

## Milestone 6: Editing of page layout

### Activity 1: To edit a page layout in Product object

1. In set up, object manager search for Products object.
2. In Product object, go to Page Layout.
3. Click Product Layout.
4. Drag and place the required fields.
5. Click save.

**Object Manager - Product**

**Page Layouts**

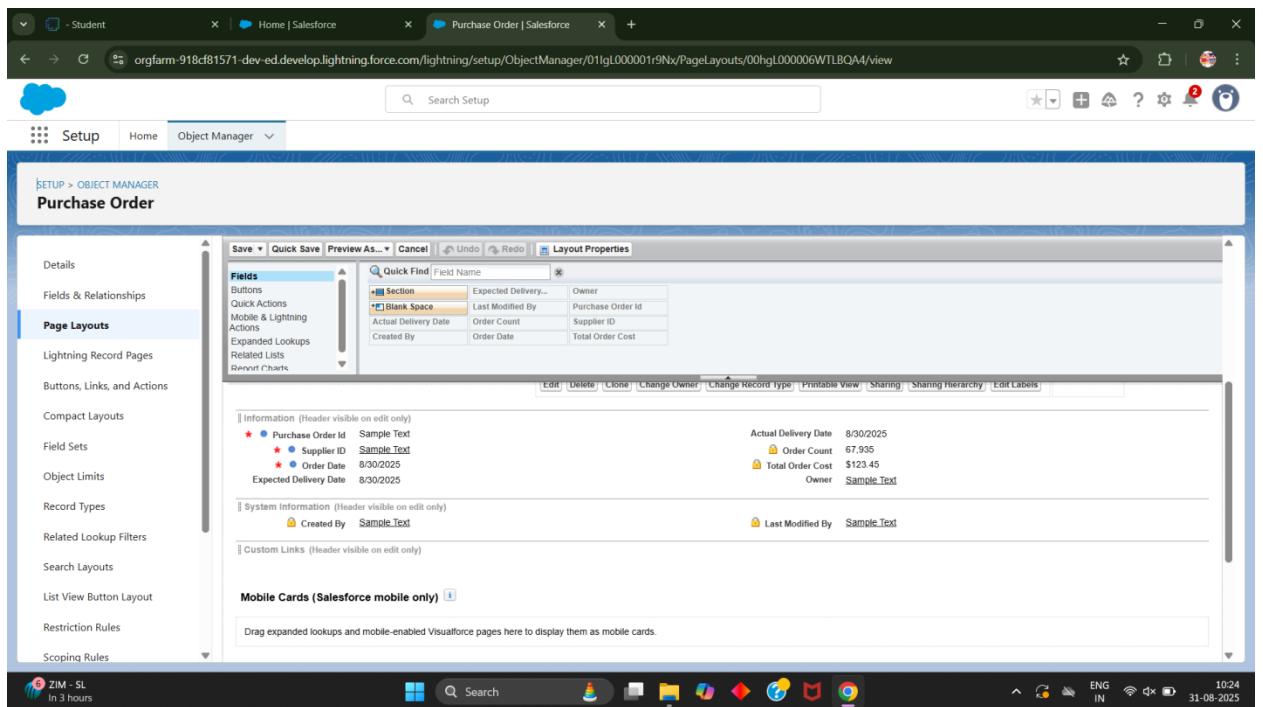
**Product Detail**

Fields:

- Expiry Date
- Product Description
- Unit Price
- Created By
- Last Modified By
- Product Id
- Product Name
- Minimum Stock Level
- Current Stock Level
- Owner

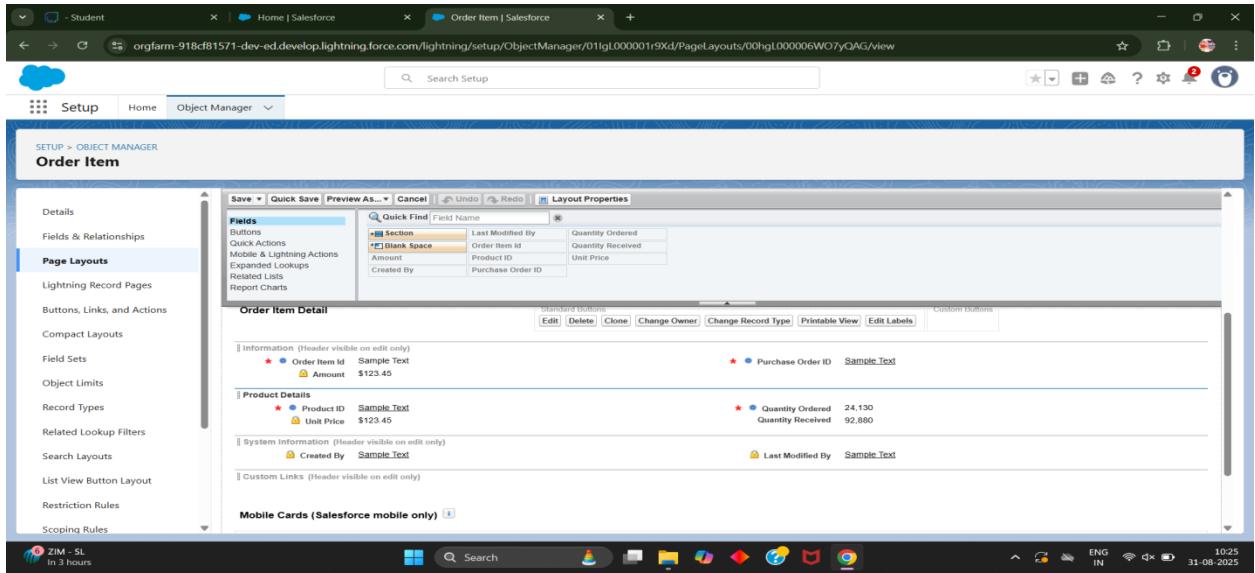
## Activity 2: To edit a page layout in Purchase order object

1. In set up, object manager search for Purchase Order object.
2. In Product object, go to Page Layout.
3. Click Purchase Order Layout.
4. Drag and place the required fields.
5. Click save.



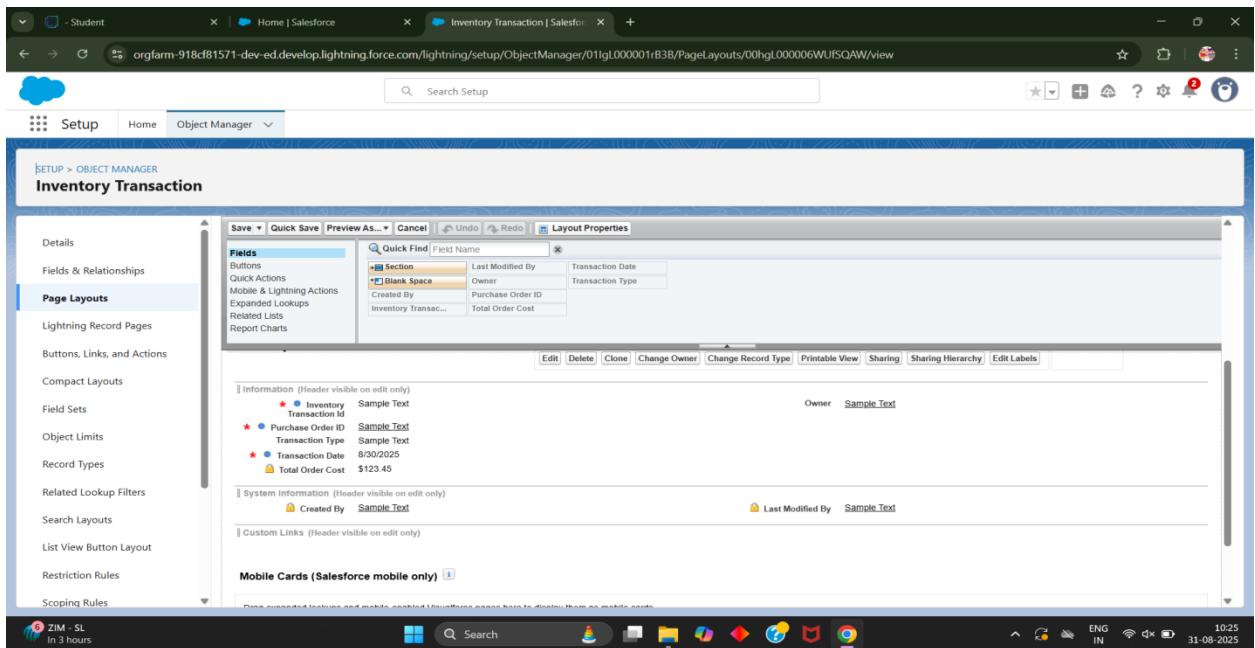
## Activity 3: To edit a page layout in Order Items object

1. In set up, object manager search for Order Items object.
2. In Product object, go to Page Layout.
3. Click Order Items Layout.
4. Drag and place the required fields.
5. Click save.



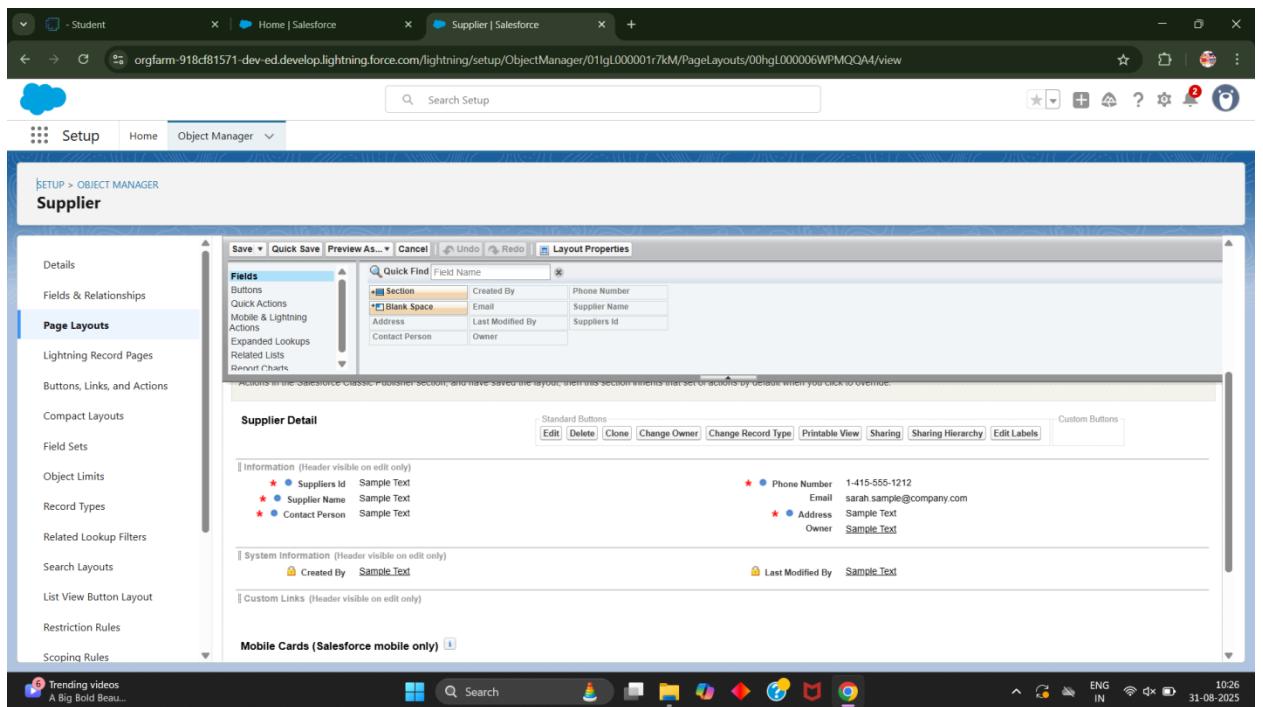
## Activity 4: To edit a page layout in Inventory Transaction object

1. In set up, object manager search for Inventory Transaction object.
2. In Product object, go to Page Layout.
3. Click Inventory Transaction Layout.
4. Drag and place the required fields.
5. Click save.



## Activity 5: To edit a page layout in Supplier object

1. In set up, object manager search for Supplier object.
2. In Product object, go to Page Layout.
3. Click Supplier Layout.
4. Drag and place the required fields.
5. Click save.

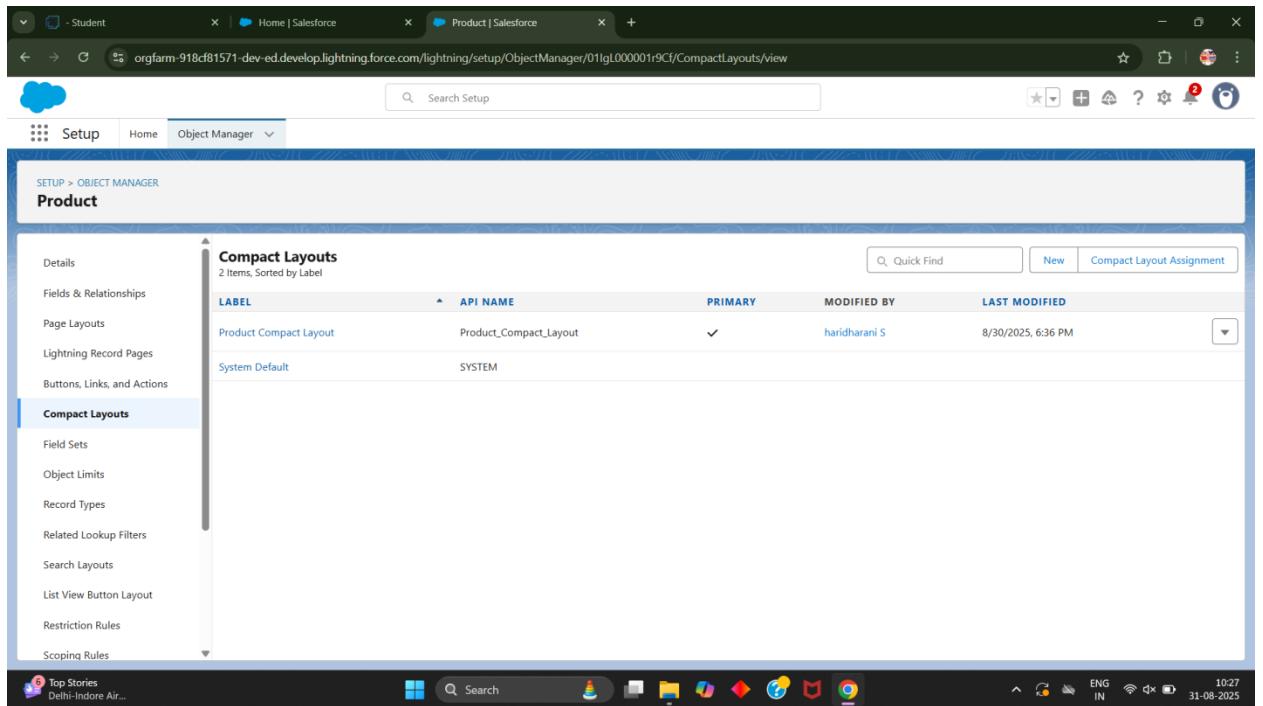


## Milestone 7: Compact Layout

### Activity 1: To create a compact layout to a Product object

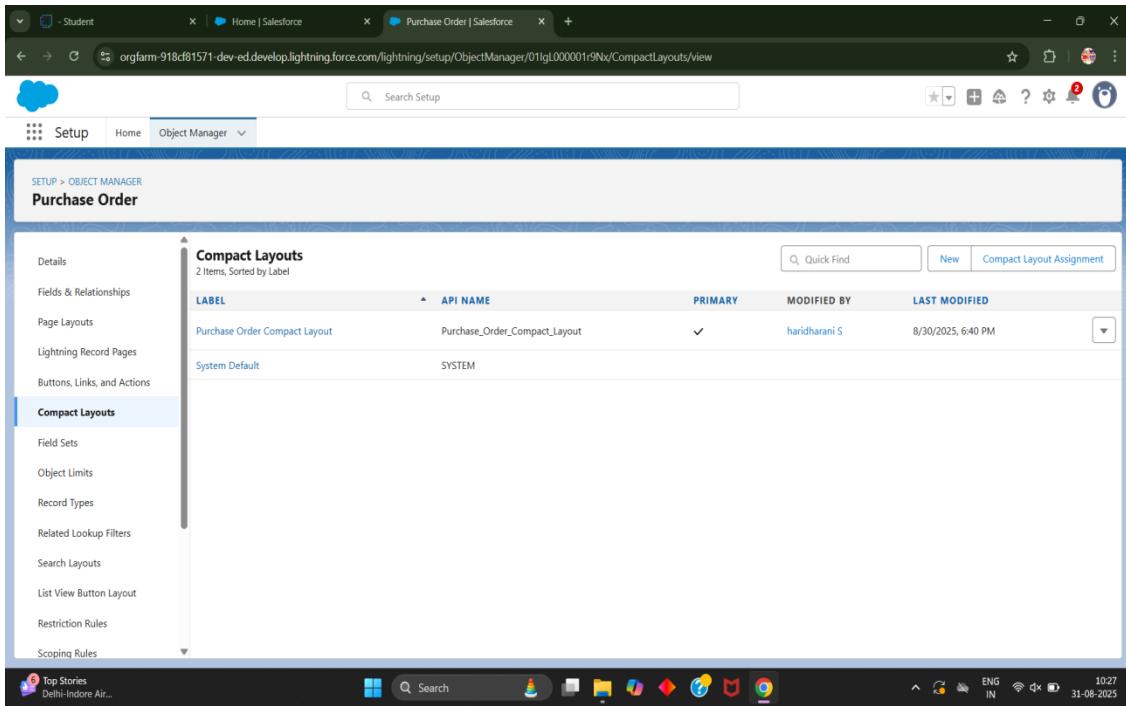
1. In set up, object manager search for Product object.
2. Click on Compact Layout in left panel.
3. Enter label as Product Compact Layout.
4. Select Fields as Product name, Unit Price, Current Stock Level.
5. Click save.
6. Click Compact Layout Assignment.

7. Click Edit Assignment, Click Product Compact Layout from dropdown.
8. Click save.



## Activity 1: To create a compact layout to a Purchase Order object

1. In set up, object manager search for Purchase Order object.
2. Click on Compact Layout in left panel.
3. Enter label as Purchase Order Compact Layout.
4. Select Fields as purchase Order ID, Order ID, Total Order Cost, Supplier ID.
5. Click save.
6. Click Compact Layout Assignment.
7. Click Edit Assignment, Click Purchase Order Compact Layout from dropdown.
8. Click save.



## Milestone 8: Validation Rules

**Activity 1:** To create an Expected Delivery date Validation Rule to a Employee object

1. In set up, object manager search for Purchase Order object.
2. Click on Validation Rules, click New.
3. Rule name as Expected Delivery Date Validation.
4. Select Active.
5. Insert the formula, (Expected\_Delivery\_Date\_\_c - Order\_Date\_\_c) > 7
6. Enter the error msg as “The Expected Delivery Date should not exceed 7 days.”.
7. Error location as Top of Page.
8. Click save.

The screenshot shows the Salesforce Setup interface for the Purchase Order object. On the left, a sidebar lists various setup categories such as Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Validation Rules' and shows a table with one item: 'Expected\_Delivery\_Date\_Validation'. The table columns are RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The row details are: Rule Name 'Expected\_Delivery\_Date\_Validation', Error Location 'Top of Page', Error Message 'The Expected Delivery Date should not exceed 7 days.', Active status checked, and Modified By 'haridharani S.' on '8/30/2025, 10:50 PM'. The bottom of the screen shows the Windows taskbar with various pinned icons and system status.

## Phase 4: Data Migration, Testing & Security

### Milestone 9: Profiles

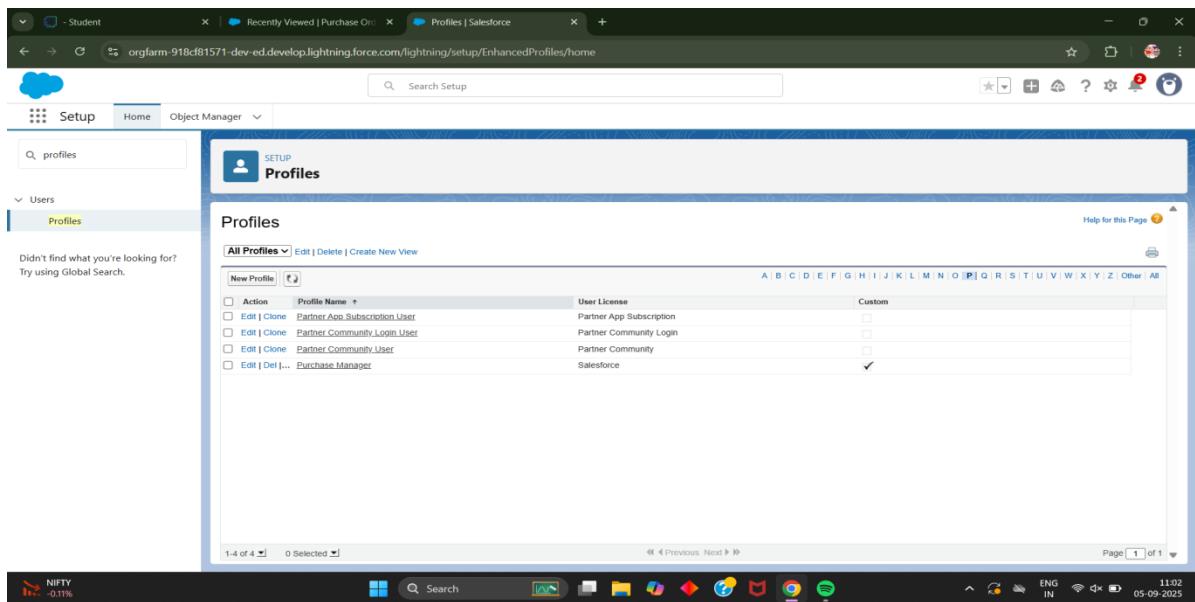
#### Activity 1: To create an Inventory Manager profile

1. In set up, Profiles.
2. Click clone next to Standard User, profile name as Inventory Manager, Click save.
3. Click Edit check the fields which are required.
4. Click save.

The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar shows 'Users' and 'Profiles' selected. The main content area is titled 'Profiles' and displays a table of profiles. The table has columns for Action, Profile Name, User License, and Custom. There are three entries: 'Action' (checkbox), 'Identity\_User' (checkbox), and 'Inventory\_Manager' (checkbox). The User License for 'Identity\_User' is 'Identity' and for 'Inventory\_Manager' is 'Salesforce'. The bottom of the screen shows the Windows taskbar with various pinned icons and system status.

## **Activity 2: To create an Purchase Manager profile**

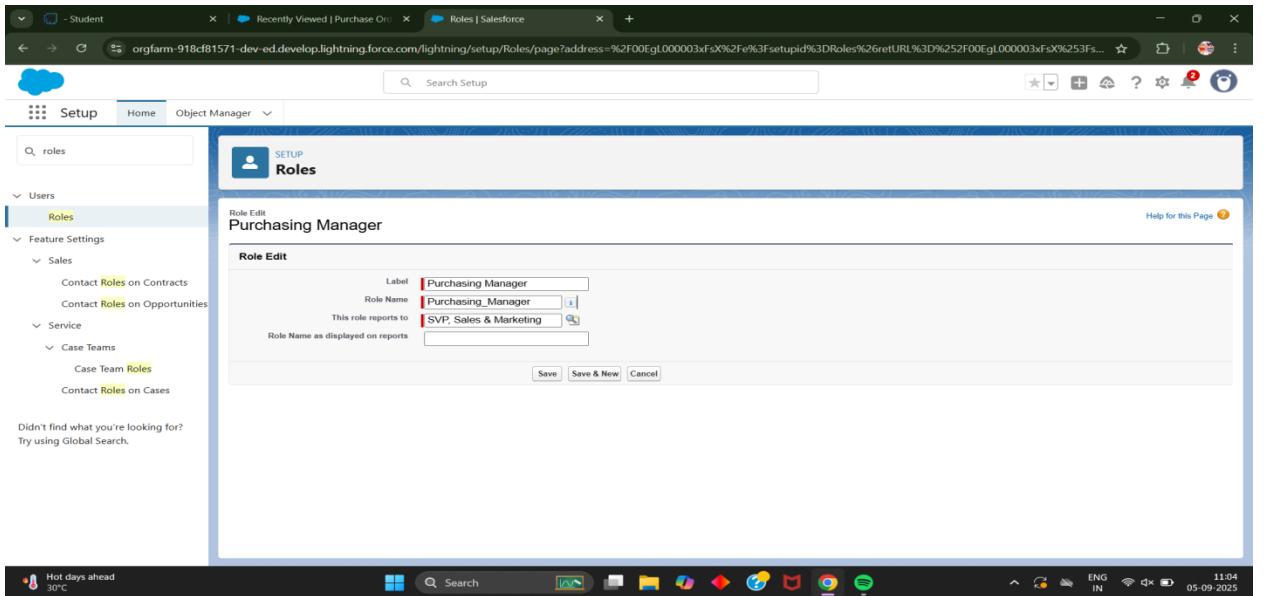
1. In set up, Profiles.
2. Click clone next to Standard User, profile name as Purchase Manager, Click save.
3. Click Edit check the fields which are required.
4. Click save.



## **Milestone 10: Roles**

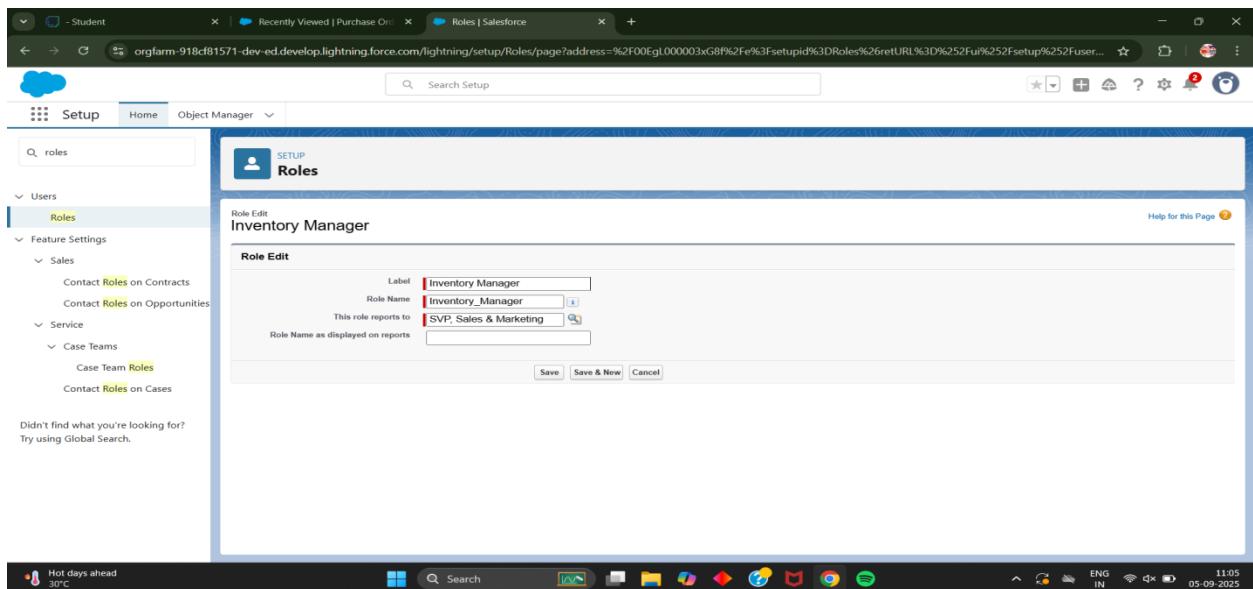
### **Activity 1: Create a Purchase Manager Role**

1. In set up, roles click Set Up Roles.
2. Click Expand all and click add role under SVP,Sales & Marketing role.
3. Label as Purchasing Manager
4. Click save.



## Activity 1: Create a Purchase Manager Role

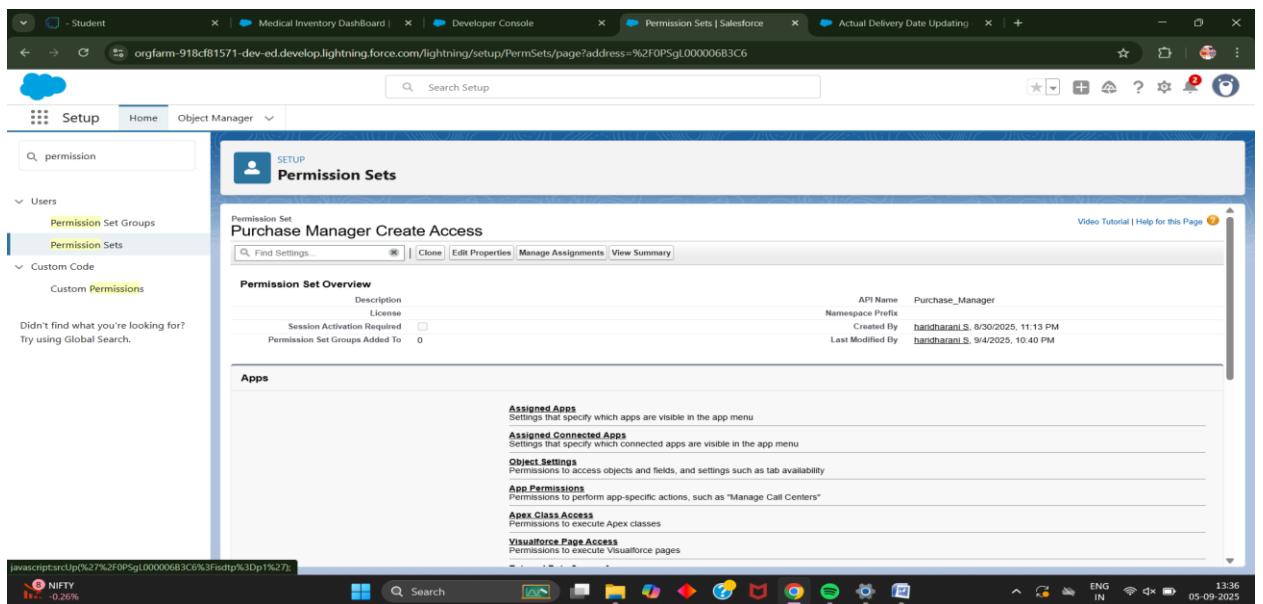
1. In set up, roles click Set Up Roles.
2. Click Expand all and click add role under SVP,Sales & Marketing role.
3. Label as Inventory Manager
4. Click save.



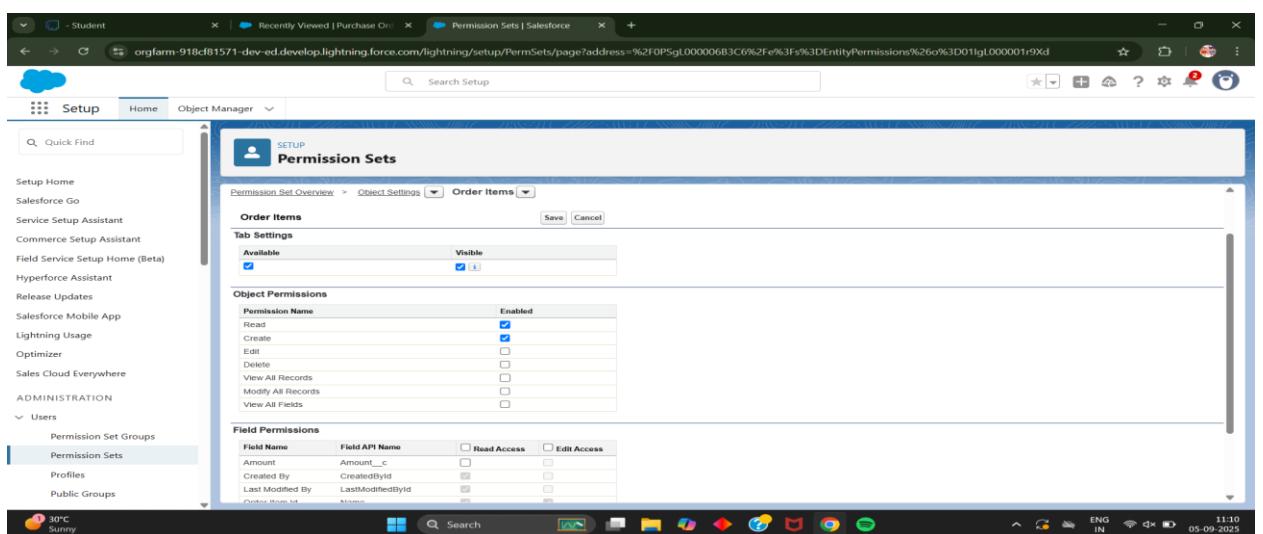
## Milestone 12: Permission sets

### Activity 1: Create a Permission Set

1. In set up, Permission Sets.
2. Click New, Label as Purchase Manager Create Access
3. Click save.



4. Click Object Settings, Select Order Items.
5. Click edit, and check the fields as shown below.



6. Click Manage Assignment, Click Add Assignment, Select John PurchaseM and Click Next.
7. Select No Expiration date.
8. Click Assign.

The screenshot shows the Salesforce Setup interface. The URL in the address bar is `orgfarm-918cf81571-dev-ed.lightning.force.com/lightning/setup/PermSets/0Pg000006B3C6/PermissionSetAssignment/home`. The main content area displays the 'Purchase Manager Create Access' permission set. The 'Current Assignments' section contains a table with the following data:

Full Name	Active	Role	Profile	User License	Expires On
John PurchaseM	✓	Purchasing Manager	Purchase Manager	Salesforce	

The sidebar on the left is titled 'Setup' and includes links for 'Home', 'Object Manager', 'Quick Find', and various setup modules like 'Setup Home', 'Service Setup Assistant', 'Commerce Setup Assistant', etc. The 'Users' section of the sidebar is expanded, showing 'Permission Set Groups', 'Permission Sets' (which is currently selected), 'Profiles', and 'Public Groups'. The system status bar at the bottom shows it's 11:11, ENG IN, and the date is 05-09-2025.

## Milestone 13: Flows

### Activity 1: Create flow to update the Actual Delivery Date

1. In set up, flows click New Flow.
2. Select Start From Scratch, select Record Trigger flow.
3. Select object as Purchase Order.
4. Select A record is created or updated.
5. Entry Condition : None.
6. Select Fast Field Updates
7. Add Get Purchase Record, object as Purchase Order.
8. Condition Required: All Condition are Met(AND).

i)Field: Id      Operator: Equals      Value: { !\$Record.Id }

9. Select Only the First record, Select Choose fields and let Salesforce do the rest.

10. Select field as Order\_Date\_\_c.

11. Select Manage Tab, Click New Resource

12. Select variable, API name as ActualDeliveryDate

13. Select data type as Date, Click Done.

14. Set Variable Values:

a) Variable : {!ActualDeliveryDate}

Operator : Equals

Value : { !\$Record.Order\_Date\_\_c }

b) Variable : {!ActualDeliveryDate}

Operator : Add

Value : 3

15. Click Done.

16. Add Assignment Element, Enter label as Updating Purchasing Order.

17. Select Use the Purchase Order record that triggered the flow. Set Filter Condition: None.

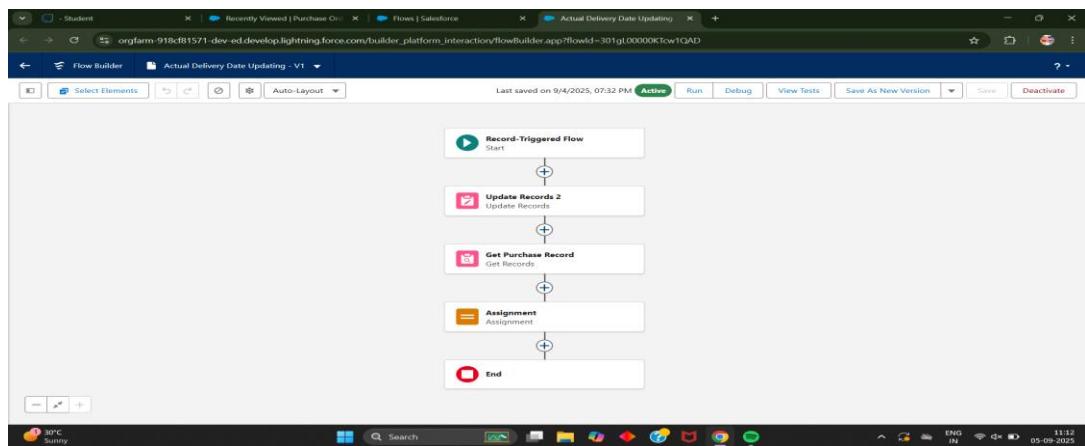
18. Set Field Values for the Trip Record as

Field : Actual\_Delivery\_Date\_\_c

Value : {!ActualDeliveryDate}.

19. Click Done, Save the flow Actual Delivery Date Updating.

20. Activate the flow.



## Milestone 14: Triggers

### Activity 1: Create a Trigger To Calculate Total Amount on Order Item

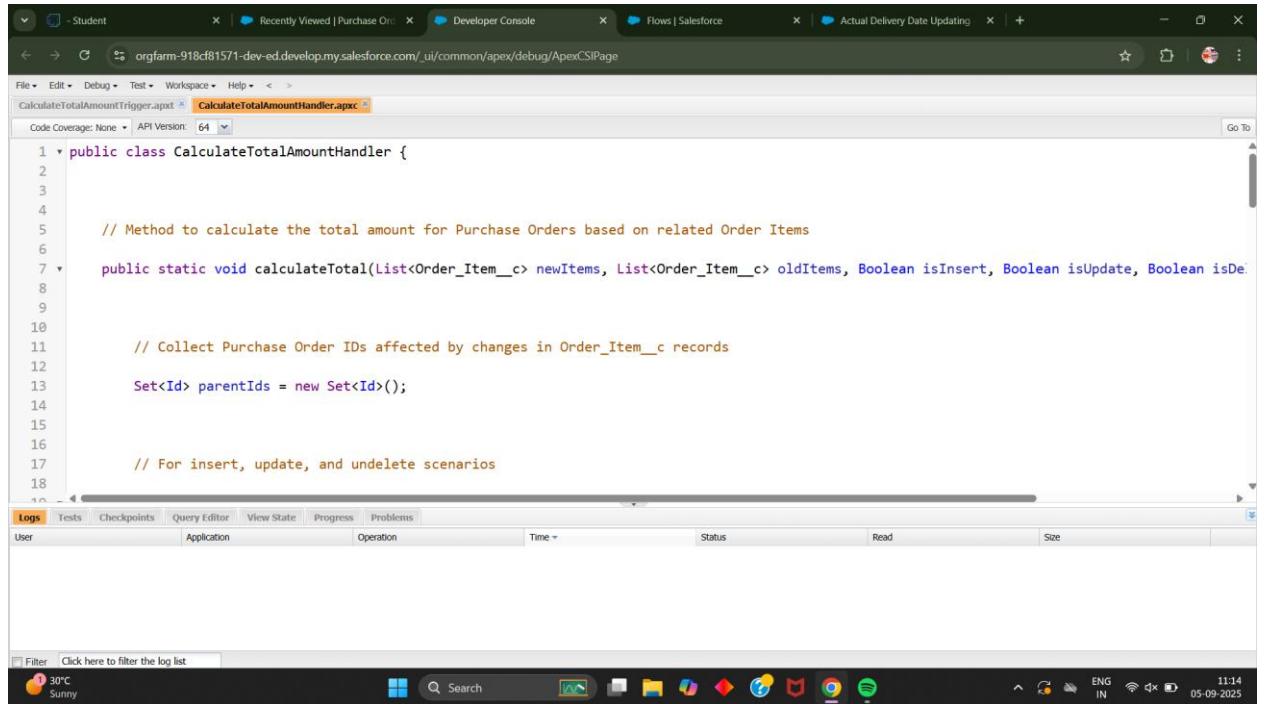
1. In set up, Open Developer Console.
2. In Developer Console, Click New → File → Apex Trigger.
3. Name: CalculateTotalAmountTrigger, sObject: Order\_Item\_\_c.
4. Enter the code.

```

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);
}

```

5. Click New → File → Apex Class.
6. Name: CalculateTotalAmountHandler.
7. Enter the code.



The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes tabs for Student, Recently Viewed, Purchase Order, Developer Console, Flows | Salesforce, and Actual Delivery Date Updating. The main area displays the code for `CalculateTotalAmountHandler.apxc`. The code defines a public class `CalculateTotalAmountHandler` with a static method `calculateTotal` that takes lists of `Order_Item__c` records and boolean parameters for insert, update, and delete operations. It also includes logic to collect purchase order IDs affected by changes in `Order_Item__c` records. The bottom of the screen shows the Windows taskbar with various icons and system status information.

```

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

```

## Phase 5: Development, Documentation & Maintenance

### Milestone 15: Reports

#### Activity 1: Create a Purchase Order based on Supplier(Summary) Report

1. Click App Launcher.
2. Select Medical Inventory Management App.
3. Click Reports → New Report.
4. Select Report type as Purchase Order, Click Start Report.
5. Select show me: All purchase orders.
6. 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).

7. Click Save&Run.
8. Report name: Purchase Order based on Supplier.
9. Click Save.

## View Report

1. Click App Launcher.
2. Select Medical Inventory Management App.
3. Click Reports Tab.
4. Click Purchase Order based on Supplier and see records.

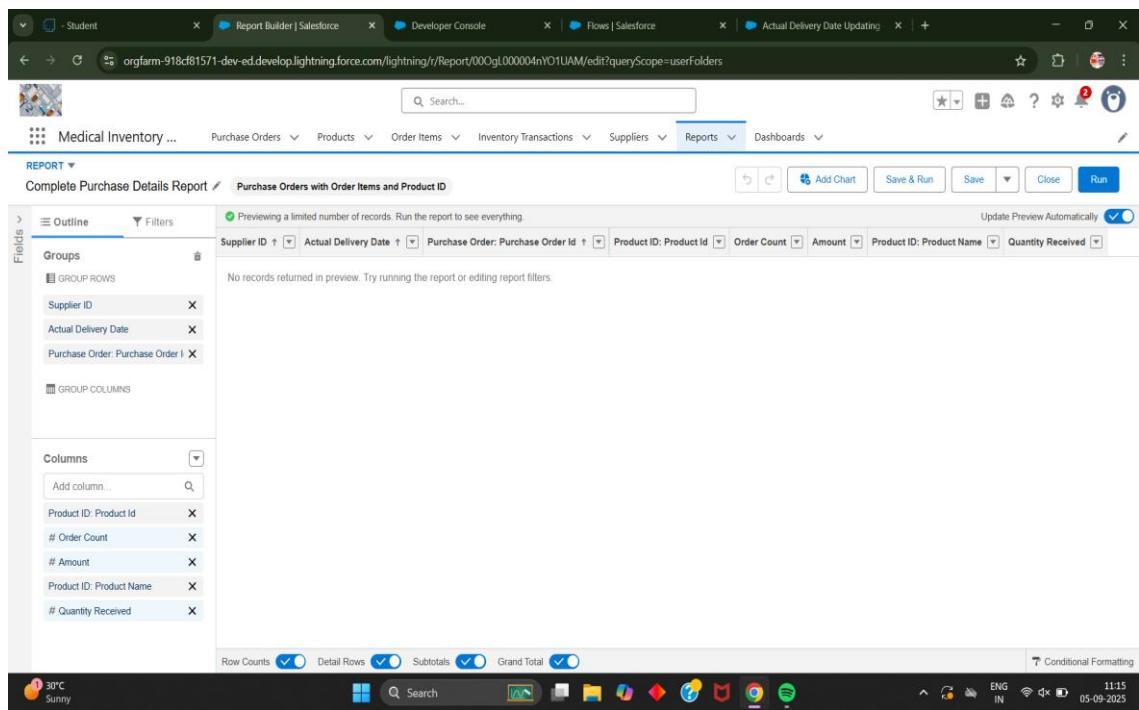
The screenshot shows the Salesforce Report Builder interface. The report title is "Purchase Orders based on Suppliers". The report preview shows data grouped by Supplier ID, with subgroups for Purchase Order ID. The columns are Supplier ID, Purchase Order: Purchase Order Id, Order Count, and Total Order Cost. The data includes records for Supplier 001 and Supplier 002, with a total of 5 purchase orders and a total cost of \$26,325.00.

Supplier ID	Purchase Order: Purchase Order Id	Order Count	Total Order Cost
Supplier 001 (4)	Purchase 0001 (1)	0	\$2,075.00
	Purchase 0002 (1)	0	\$3,250.00
	Purchase 0003 (1)	0	\$7,000.00
	Purchase 0004 (1)	0	\$9,500.00
Supplier 002 (1)	Purchase 0005 (1)	0	\$4,500.00
Total (5)		0	\$26,325.00

## Activity 1: Create a complete Purchase Details report

1. Click App Launcher.
2. Select Medical Inventory Management App.
3. Click Reports → New Report.

4. Select Report type as Purchase Order with Order Items and Product ID, Click Start Report.
5. Select show me: All purchase orders.
6. 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).
7. Click Save&Run.
8. Report name: Purchase Order based on Supplier.
9. Click Save.

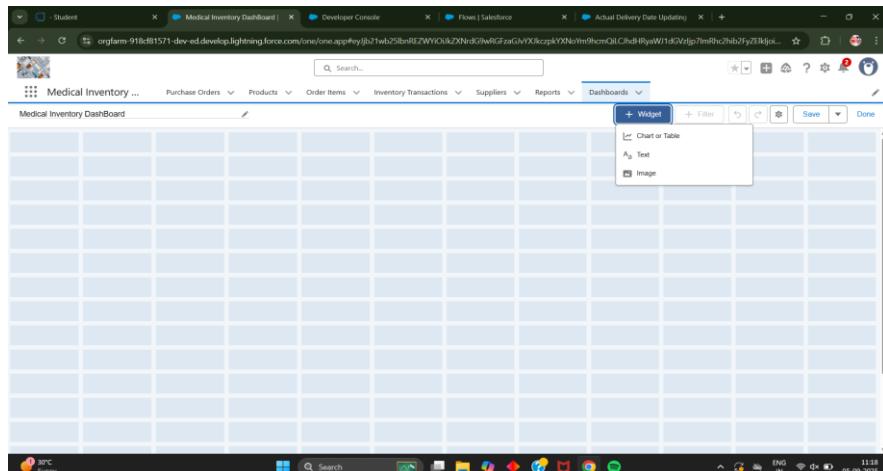


## Milestone 16: Dashboards

### Activity 1: Create Dashboard

1. In Medical Inventory Management App, Click Dashboard Tab.

2. Click New Dashboard.
3. Name: Medical Inventory Dashboard
4. Click Create
5. Click +Widget, Select Purchase Order based on Supplier.
6. For the data visualization select any of the charts, tables etc. as per your choice/requirement
7. Click add → save.



8.

## Activity 2: View Dashboard

1. Click on App Launcher, Search Medical Inventory Management App.
2. In Medical Inventory Management App, Click Dashboard Tab.
3. Click Medical Inventory Dashboard and see the Widget.

