

## **Medical Inventory Management in Salesforce**

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### **1. Project Documentation**

#### **Abstract**

Medical Inventory Management is a Salesforce-based solution designed to streamline the tracking, monitoring, and reporting of medicines, equipment, and consumables in hospitals and pharmacies. This project focuses on ensuring stock availability, reducing wastage due to expiry, and providing real-time reports for effective decision-making.

#### **Problem Statement**

Hospitals and pharmacies often face challenges in managing stock due to manual tracking systems, lack of expiry alerts, and delayed reports. This results in medicine shortages, overstocking, or wastage.

#### **Objectives**

- Automate inventory management using Salesforce.
- Provide real-time stock status and expiry alerts.
- Enable suppliers and administrators to monitor usage.
- Generate reports and dashboards for decision-making.

#### **System Requirements**

- **Hardware:** Laptop/PC with internet access.
- **Software:** Salesforce Developer Org, Browser (Chrome/Edge).
- **Skills Required:** Salesforce Objects, Fields, Validation Rules, Flows, Reports, and Dashboards.

#### **Modules / Features**

1. **Stock Management** – Add, update, and monitor medicines and equipment.

2. **Supplier Management** – Track supplier details and order history.
3. **Expiry Alert System** – Automatic notifications for soon-to-expire stock.
4. **Reports & Dashboards** – Visual representation of stock status.
5. **User Roles** – Admin, Pharmacist, and Supplier.

## Implementation in Salesforce

- **Custom Objects:** Medicine, Supplier, Stock Transaction.
- **Fields:** Quantity, Batch Number, Expiry Date, Supplier Name.
- **Automation:** Flow for expiry alerts, approval process for stock requests.
- **Reports:** Daily stock report, Expiry report, Supplier-wise stock report.
- **Dashboard:** Real-time inventory overview.

## Conclusion

The Salesforce-based Medical Inventory Management system reduces manual errors, improves stock visibility, and enhances patient care through timely availability of medicines. Future enhancements may include integration with hospital billing systems and AI-based demand forecasting.

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## 2. Demo Video Presentation Script

### Opening (30 sec):

“Hello everyone, today we are presenting our Salesforce project on *Medical Inventory Management*. This system is designed to solve the common problems faced in hospitals and pharmacies regarding stock tracking, expiry management, and reporting.”

### Problem Explanation (30 sec):

“In many hospitals, medicines are tracked manually which often leads to overstocking, shortages, or wastage due to expiry. Our Salesforce solution helps automate these processes.”

### System Features (1 min):

“Our project includes several modules:

- Stock Management, where administrators can add or update medicines.
- Supplier Management, which tracks supplier details and orders.
- Expiry Alerts, which notify pharmacists before medicines expire.
- Reports and Dashboards, which give real-time visibility into inventory status.”

### Demo Walkthrough (1.5 min):

“In the demo, we will log in as an Admin and add a new medicine to the inventory. Next, we’ll show how expiry alerts are triggered using Salesforce flows. Then, we’ll navigate to the dashboard where stock levels, upcoming expiries, and supplier details are displayed in real-time. Finally, we’ll generate a report that helps management plan reorders efficiently.”

### Closing (30 sec):

To conclude, our Salesforce-based Medical Inventory Management system saves time, reduces errors, and ensures timely availability of medicines. In the future, this project can be extended with AI for demand forecasting and mobile app integration for on-the-go monitoring.

# Medical Inventory Management

## User Story:

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

## Project Overview :

This project is a comprehensive Salesforce application to streamline and manage various operational aspects of medical inventory. The system aims to efficiently maintain supplier details, manage purchase orders, track product details and transactions, and monitor the expiry dates of products. Maintain detailed records of suppliers, including contact information. Catalog product information, including descriptions, stock levels. Monitor and track product expiry dates to avoid using expired items. Comprehensive reports to track supplier performance, and purchase orders.

## 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

## What you'll learn

1. Real Time Salesforce Project
2. Object & their relationship in Salesforce
3. Page Layout
4. Validation Rules
5. Compact Layouts

6. Profiles
7. Roles
8. Users
9. Permission Sets
10. Triggers
11. Flows
12. Reports
13. Dashboards

## **Milestone 1-Salesforce Account**

### Introduction:

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

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

### What Is Salesforce?

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

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

## **Milestone 2- Objects**

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

## **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.

## Milestone 4- The Lightning App

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

## 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)
<b>Inventory Transaction</b>	Transaction ID(Standard)	Text
	Purchase Order ID	Lookup(Purchase Order)
	Transaction Date	Date
	Transaction Type	Picklist
	Total Order Cost	Formula(Currency)
<b>Supplier</b>	Supplier ID(Standard)	Text
	Supplier Name	Text
	Contact Person	Text
	Phone Number	Phone
	Email	Email
	Address	TextArea

## Milestone 6 -Editing of Page Layouts

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

## Milestone 7 - Compact Layouts

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

## Milestone 8 - Validation Rules

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

return a value of true or false. When the rule's criteria are met (i.e., the expression evaluates to true), an error message is displayed, and the user is prevented from saving the record until the issue is resolved.

## **Milestone 9 - Profiles**

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

## **Milestone 10 - Roles**

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

## **Milestone 12 - Permission Sets**

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

## **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**

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

## **Milestone 15 - Reports**

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

## **Milestone 16 - Dashboards**

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

THANKS YOU.

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