Project Planning

Project Milestones & Tasks

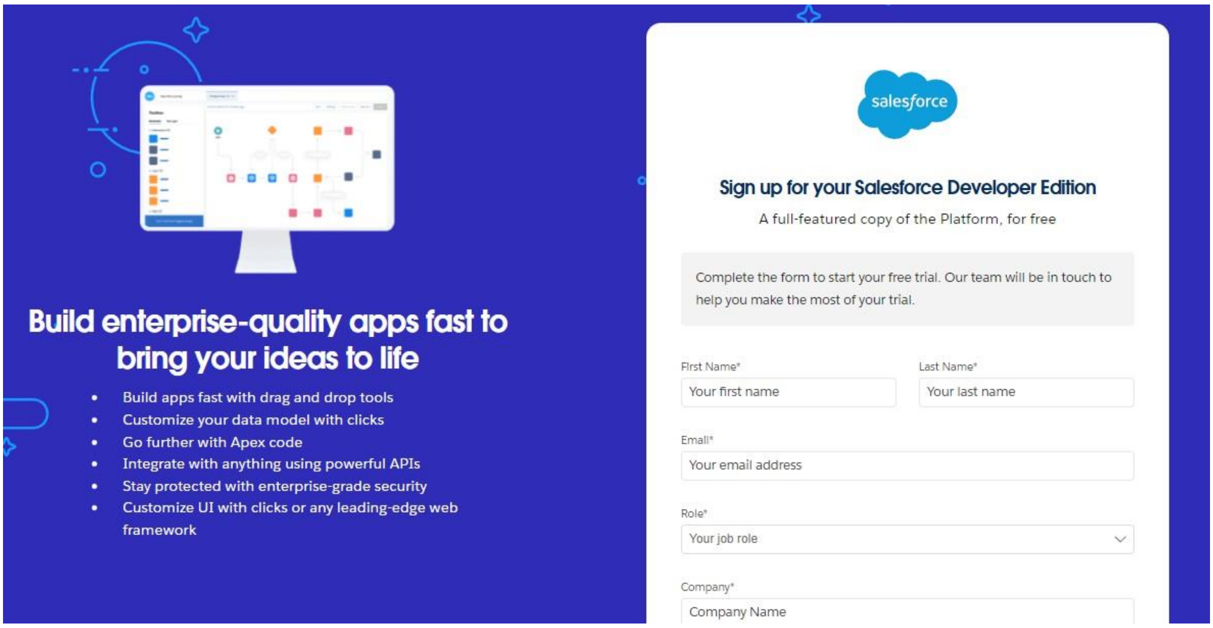
Date	1 November 2025
Team ID	NM2025TMID03427
Project Name	Medical Inventory Management
Maximum Marks	1 Mark

Milestone 1-Salesforce Account

Activity 1: Creating Developer Account

Creating a developer org in salesforce.

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



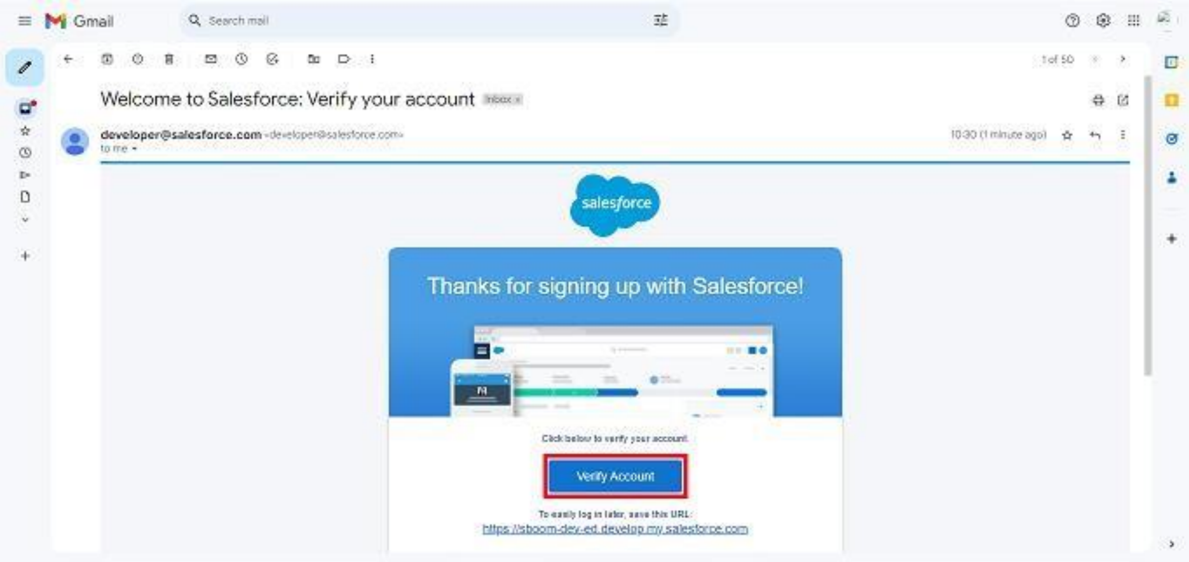
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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

Click on sign me up after filling these.

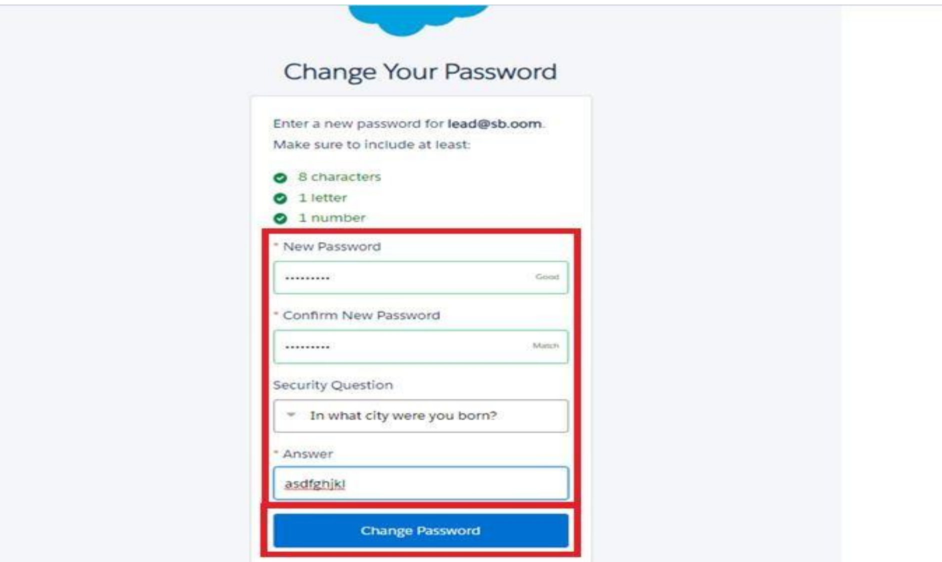
Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.

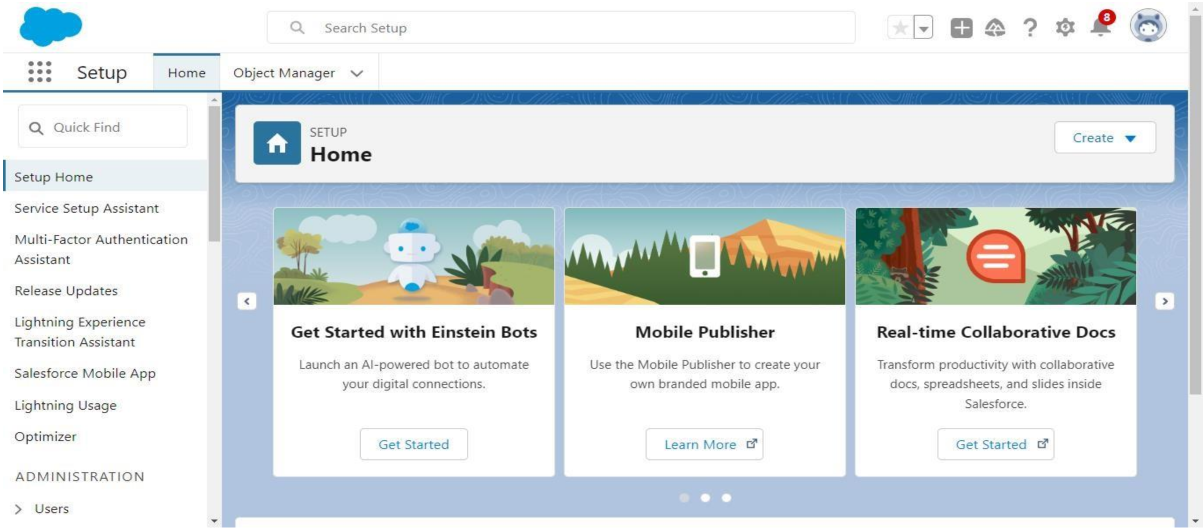


2. Click on Verify Account

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



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

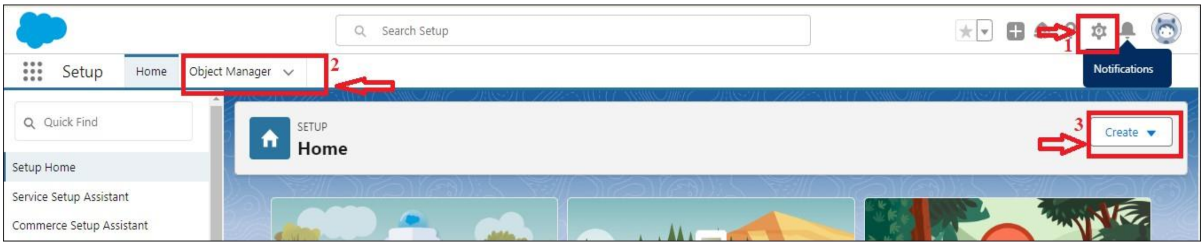


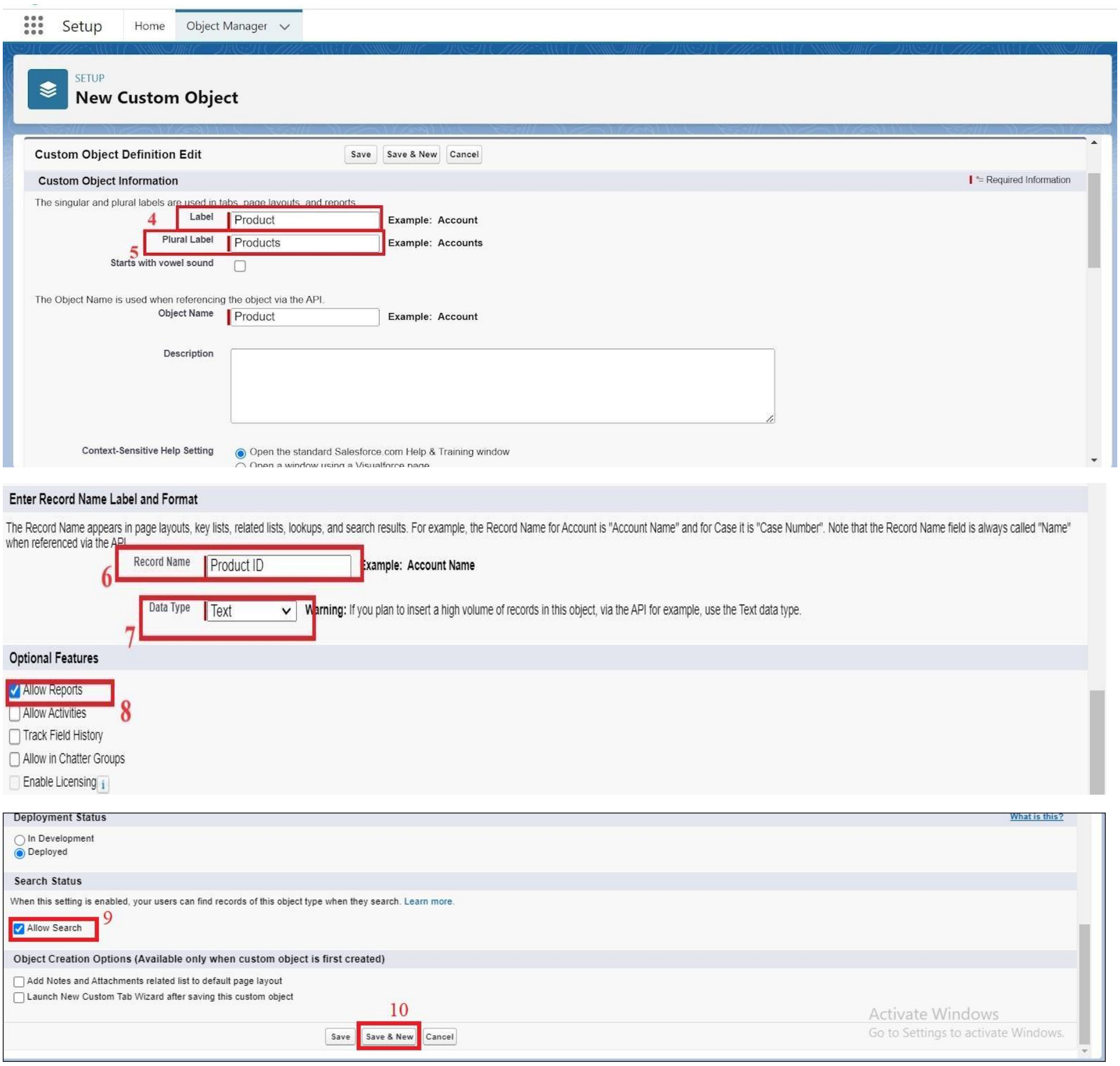
Milestone 2-Objects

Activity 1: Creating a Product Object

To create an object:

1. From the setup page
2. Click on Object Manager
3. Click on Create >> Click on Custom Object.
4. Enter the label name as Product
5. Enter Plural label name as Products
6. Enter Record Name as Product ID
7. Select Data Type as Text.
8. Select Allow reports.
9. Select Allow search.
10. Click on Save and New



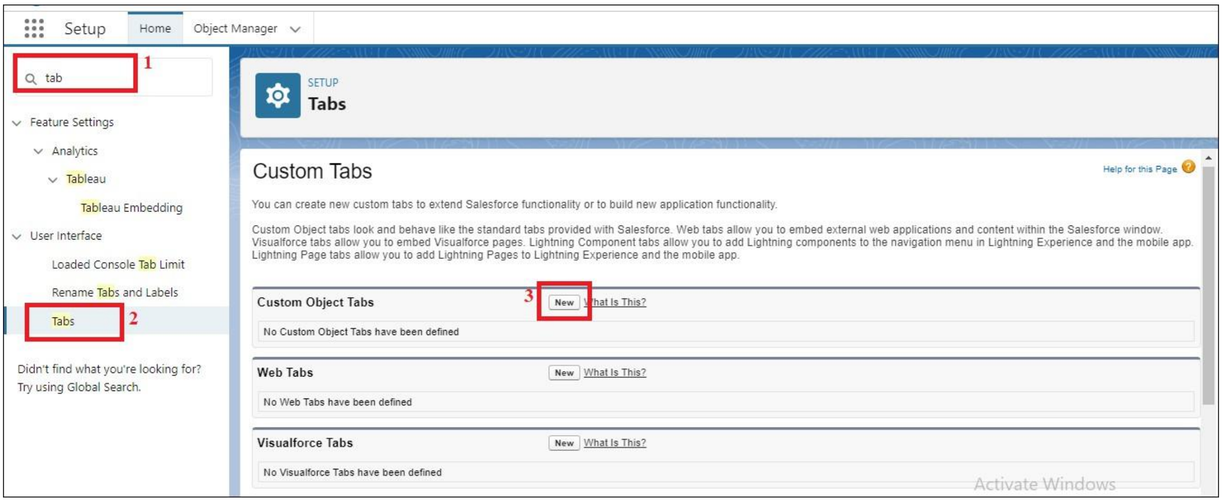


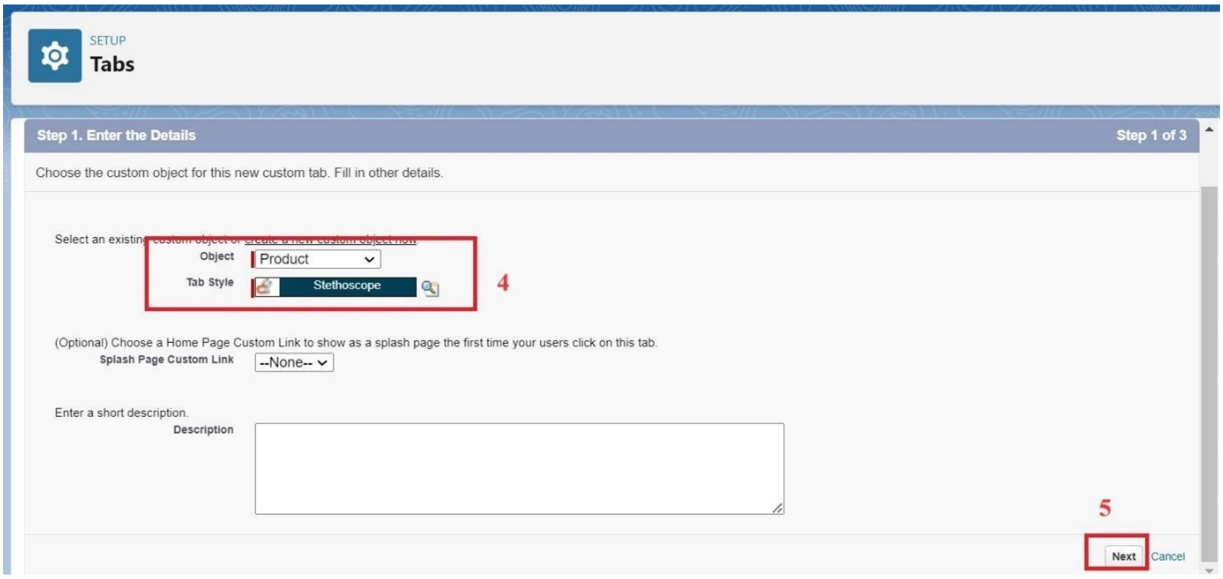
In the same way Create Purchase Order, Order Item, Inventory Transaction and Supplier objects.

Milestone 3-Tabs

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

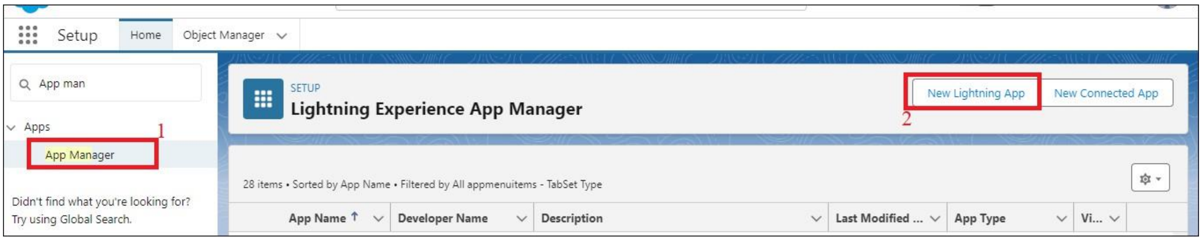


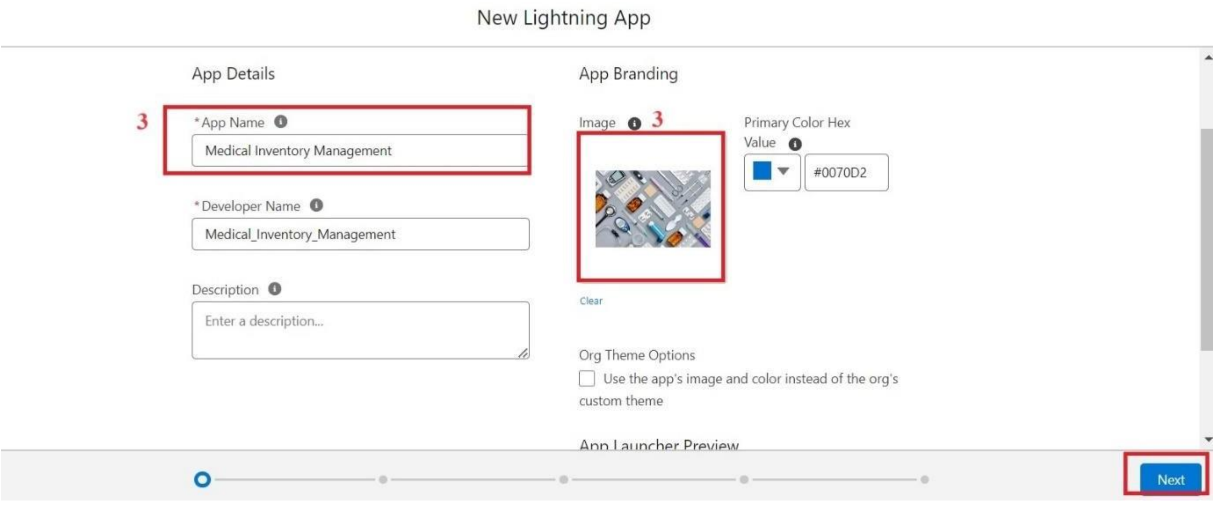


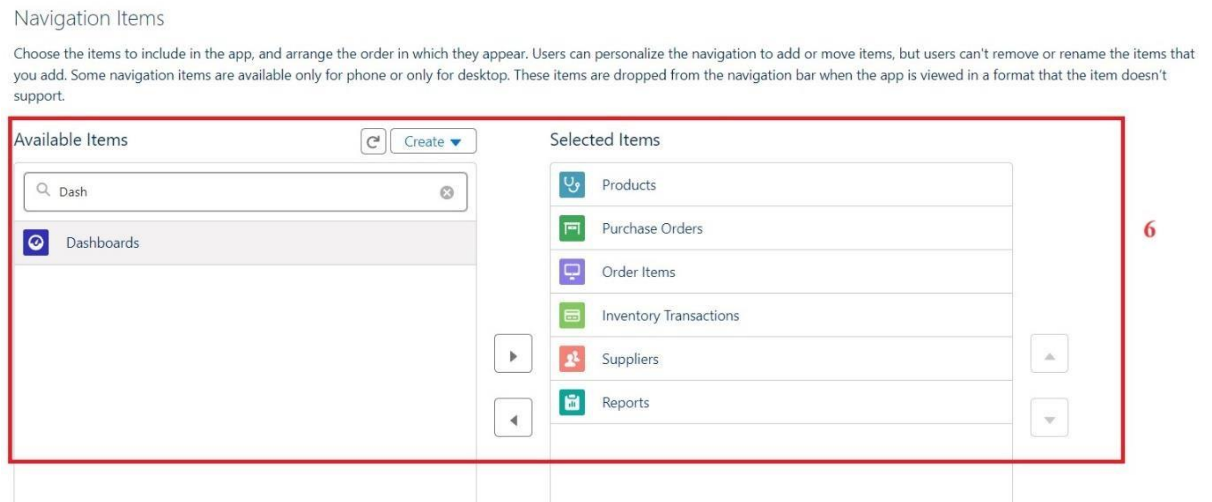
Milestone 4-The Lightning App

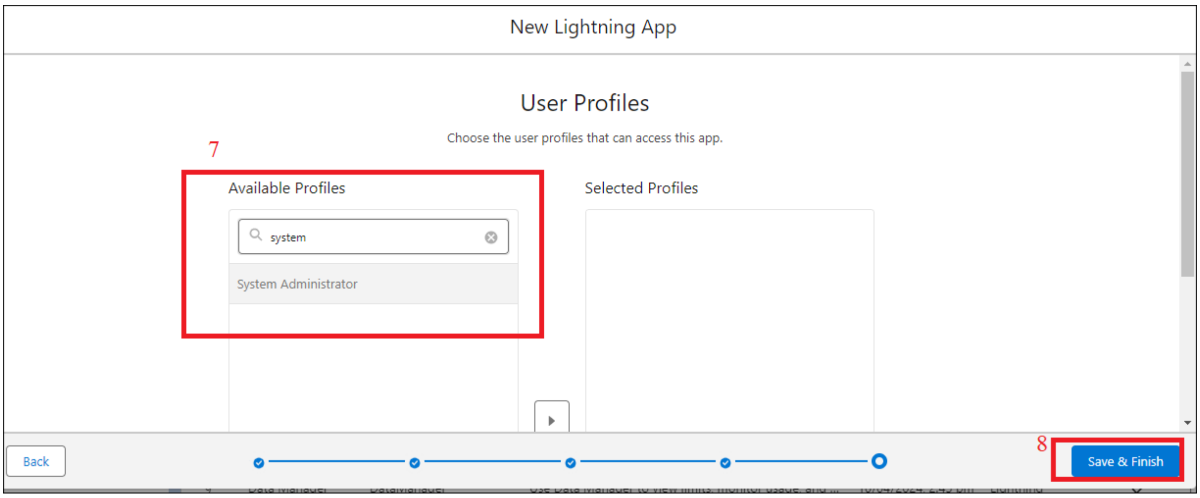
Activity 1: Create a Lightning App for Medical Inventory Management

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


Setup
Home
Object Manager
App man
Apps
App Manager
1
Didn't find what you're looking for? Try using Global Search.
SETUP
Lightning Experience App Manager
New Lightning App
New Connected App
2
28 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type
App Name
Developer Name
Description
Last Modified ...
App Type
Vi...


New Lightning App
App Details
App Branding
3
* App Name
Medical Inventory Management
* Developer Name
Medical_Inventory_Management
Description
Enter a description...
Image
3
Primary Color Hex Value
#0070D2
Clear
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
Next


Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Dash
Dashboards
Selected Items
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
6

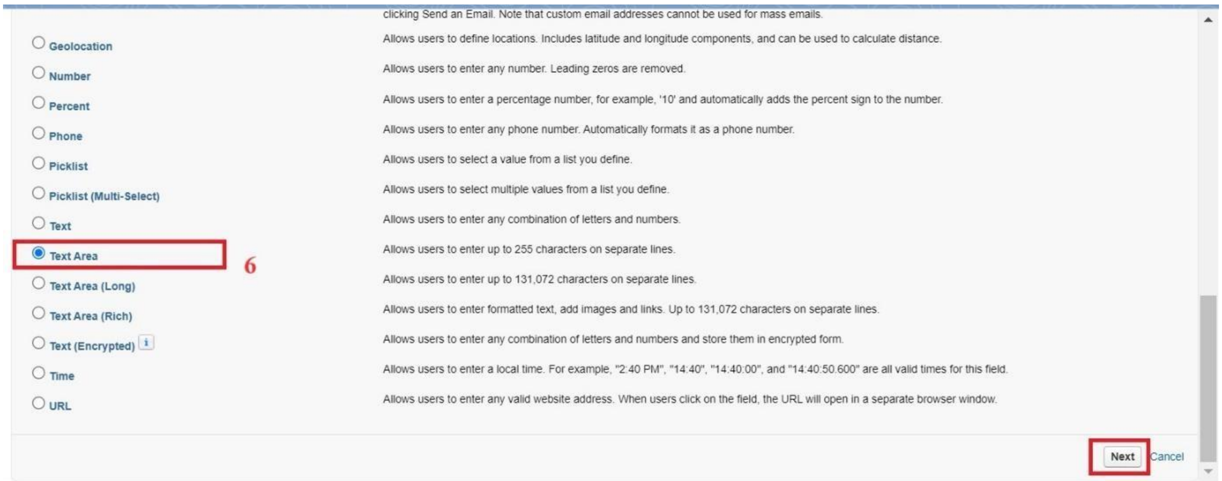

New Lightning App
User Profiles
Choose the user profiles that can access this app.
7
Available Profiles
system
System Administrator
Selected Profiles
Back
8
Save & Finish

Milestone 5 -Fields

Activity 1: Creating a TextArea Field in Product Object

To create fields in an object:

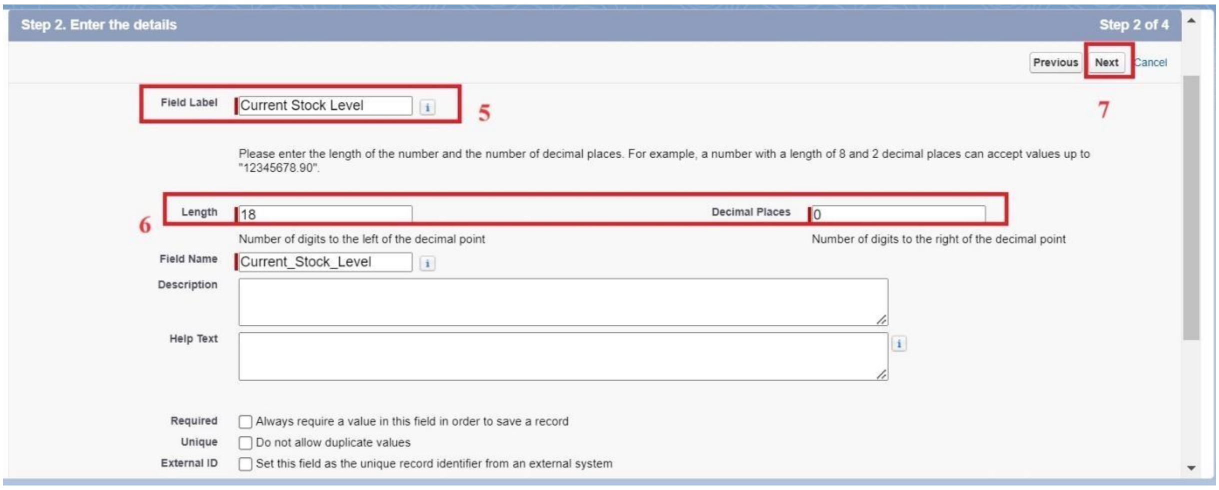
1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Product custom object.
4. Select Fields & Relationships from the left navigation
5. Click on New
6. Select TextArea field, click Next
7. Enter Field Label as “Product Description” .
8. Click Next, Next, then Save & New.



Activity 2: Creating a Number Field in Product object

To create fields in an object:

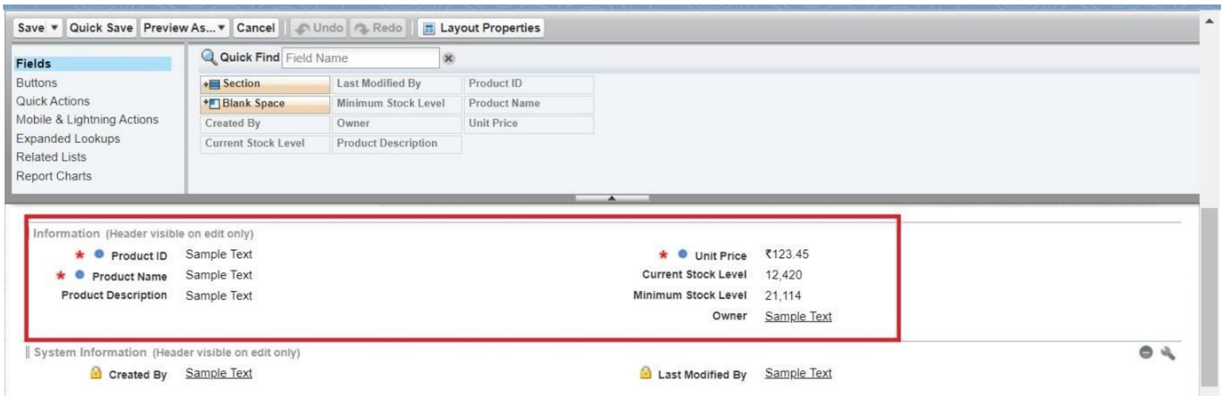
1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product custom object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Number” and click Next.
5. Enter Field Label as “ Current Stock Level”.
6. Length - 18, Decimal Places - 0.
7. Click on Next, Next and Save.



Milestone 6-Editing Of Page Layout

Activity 1: To edit a Page Layout in Product Object

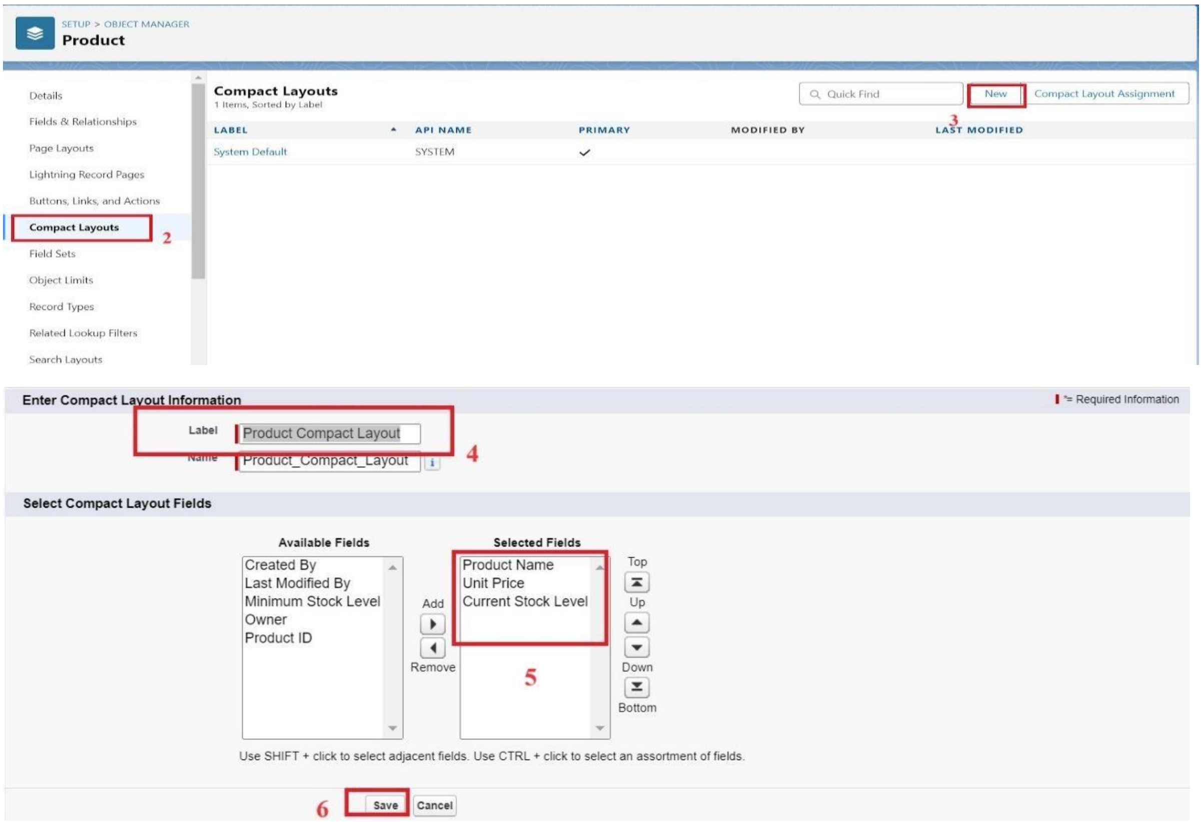
1. Go to setup >> click on Object Manager >> type object name(Product) in quick find box >> click on the Product object >> Page Layouts .
2. Click on the Product Layout.
3. Drag and Arrange the field as shown below.

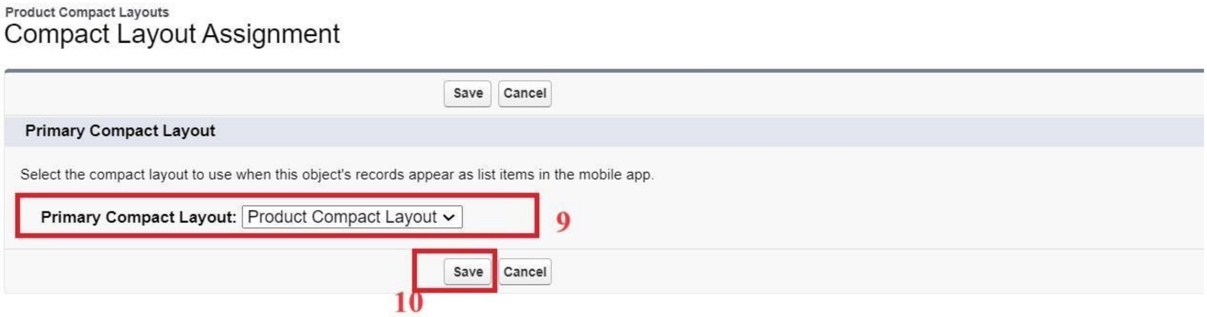


Milestone 7-Compact Layouts

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.

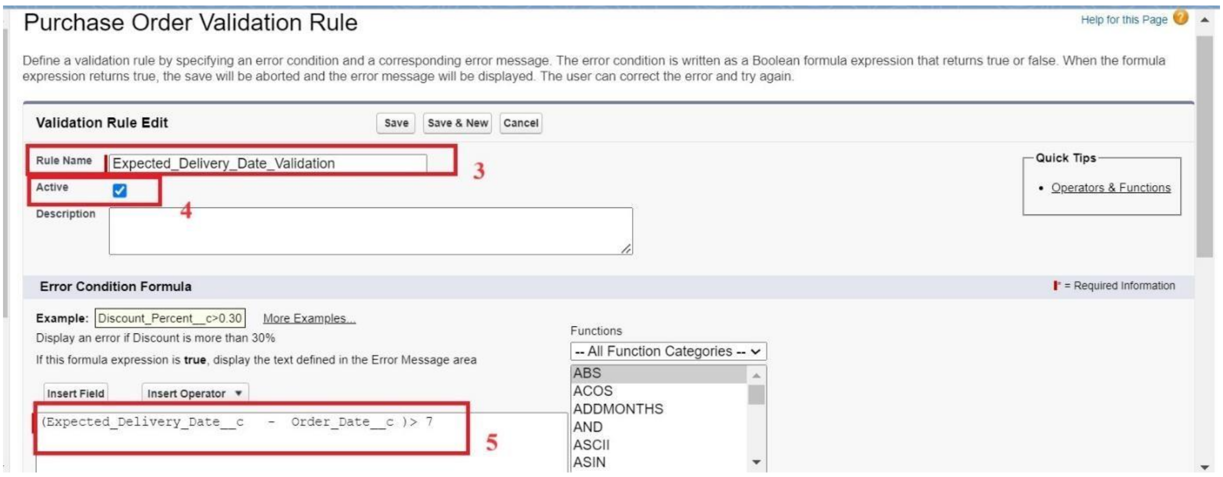




Milestone 8-Validation Rules

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

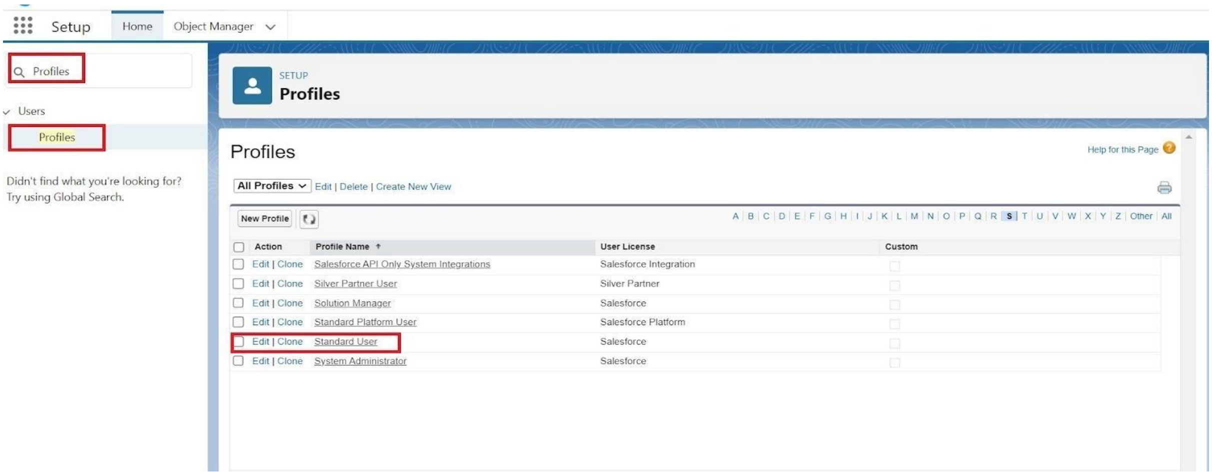


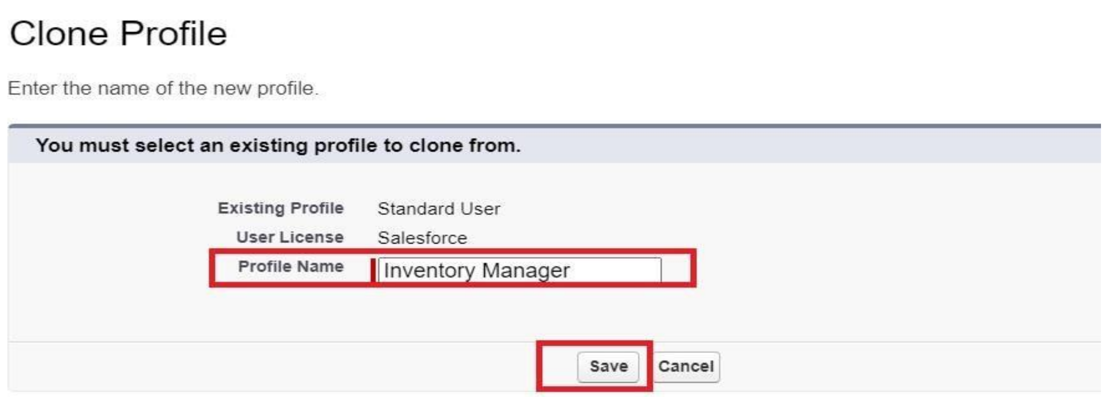
6. Enter the Error Message as "The Expected Delivery Date should not exceed 7days.".
7. Select the Error location as Top of Page
8. Click Save.

Milestone 9-Profiles

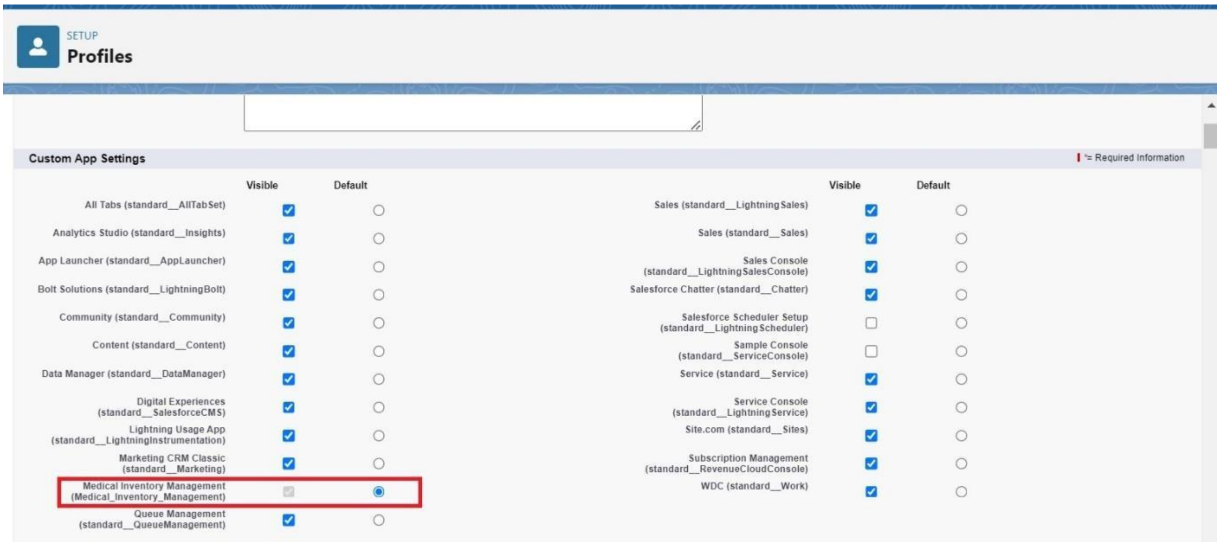
Activity 1: To create an Inventory Manager Profile

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.

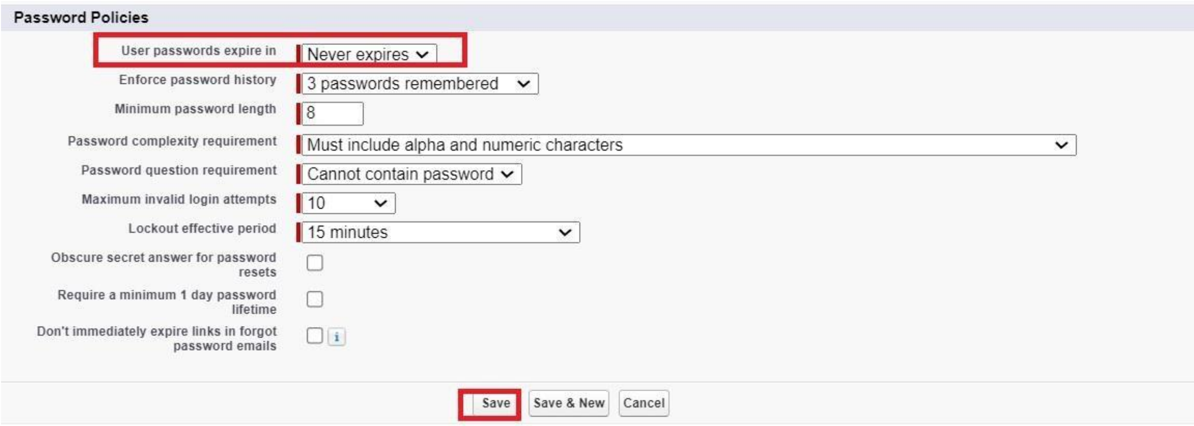


4. Scroll down to Custom Object Permissions and Give access permissions as mentioned in the below diagram.

5. Change the password policies as mentioned :

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

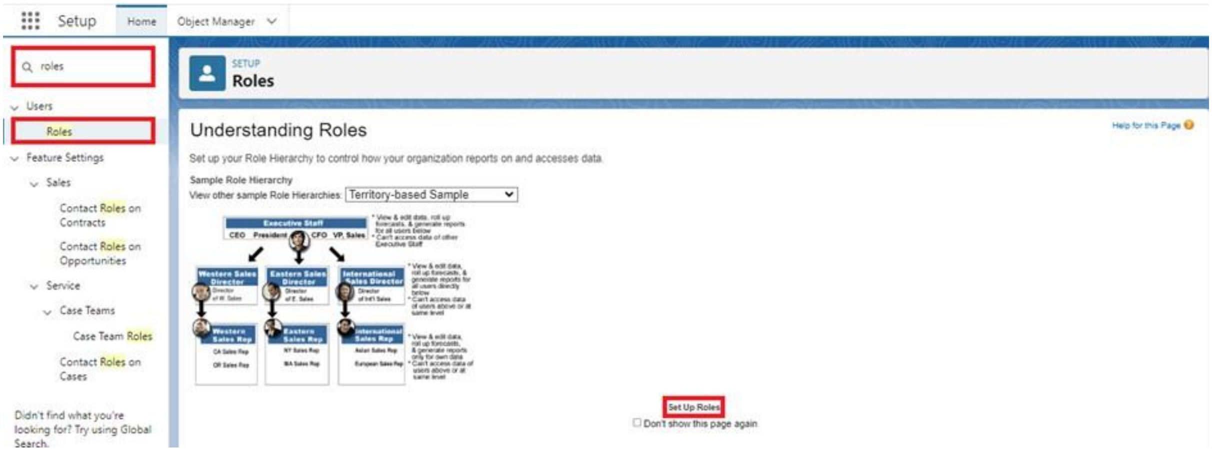
7. Minimum password length should be " 8 ", and click save.



Milestone 10-Roles

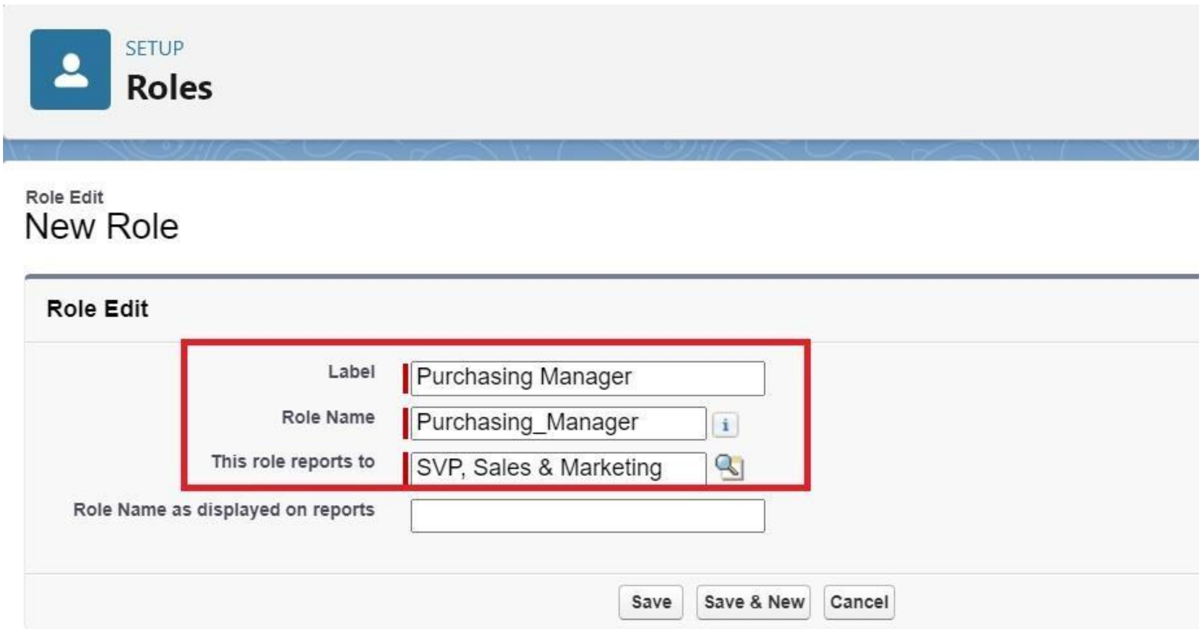
Activity 1 : Create a Purchasing Manager Role.

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



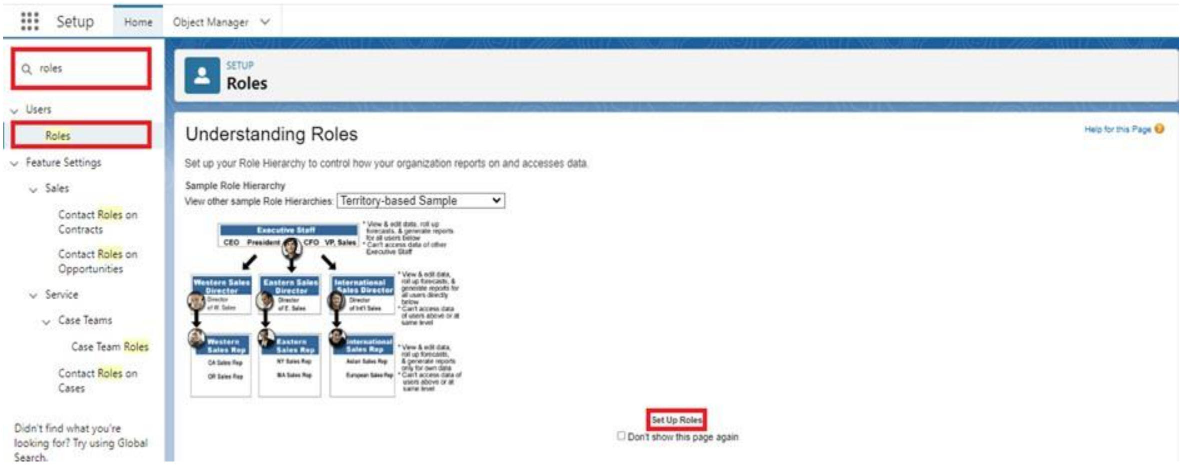
2. Click on Expand All and click on add role under SVP, Sales & Marketing role.

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



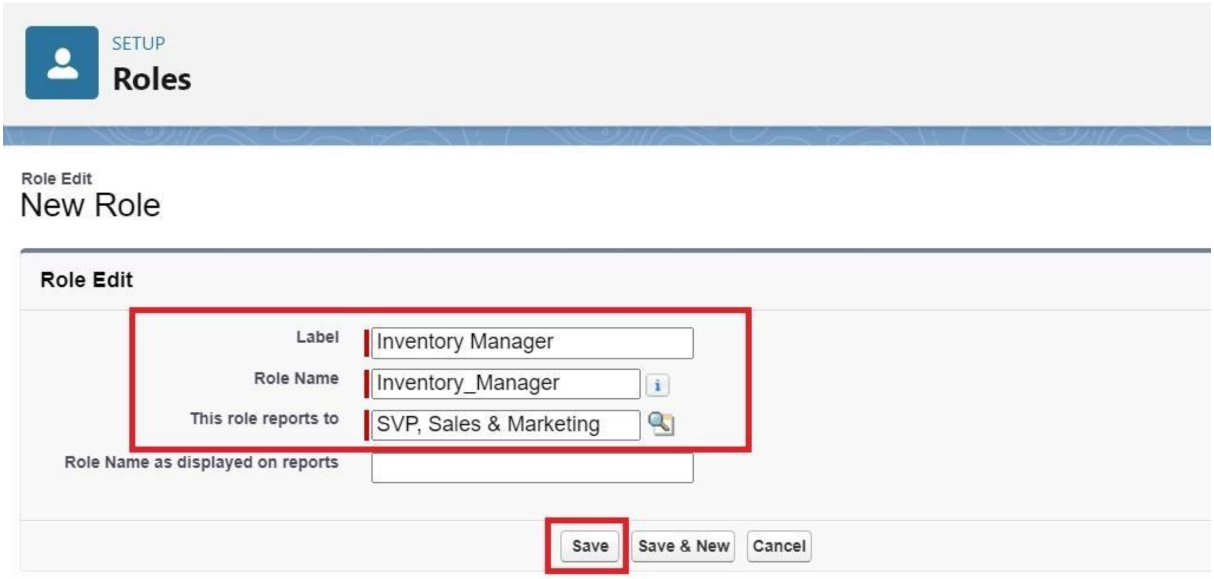
Activity 2 : Create a Purchasing Manager Role.

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



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

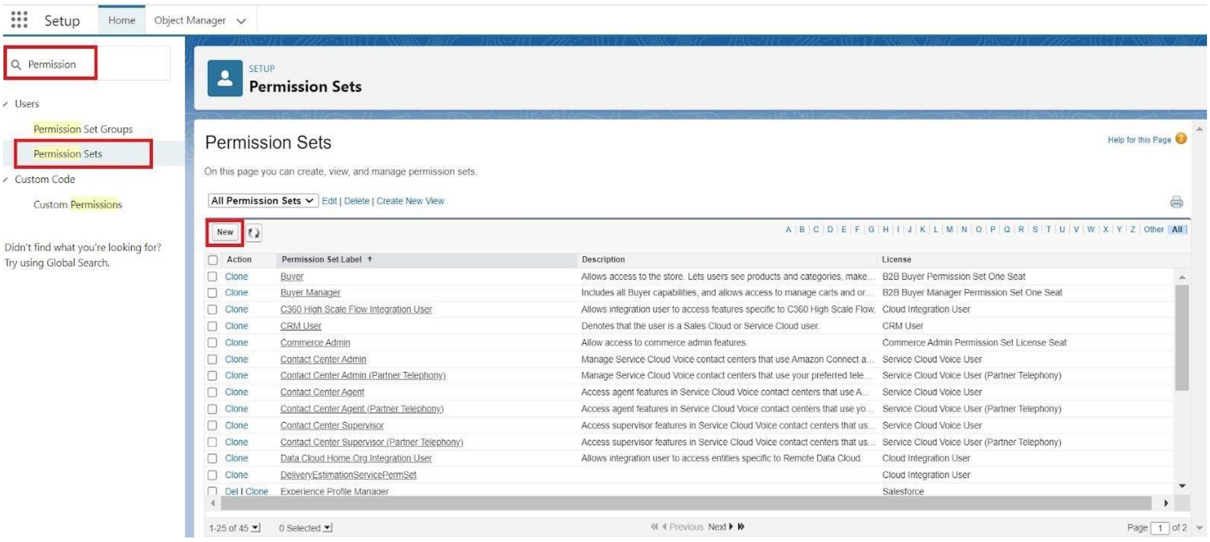
3. Give Label as “Inventory Manager” and the Role name gets auto populated. Then click on Save.



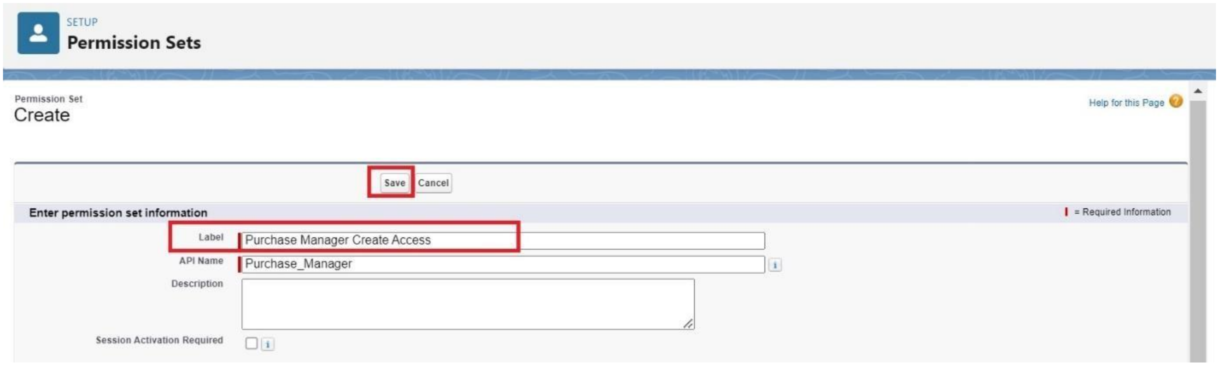
Milestone 11-Permission Sets

Activity 1 : Create a Permission Set.

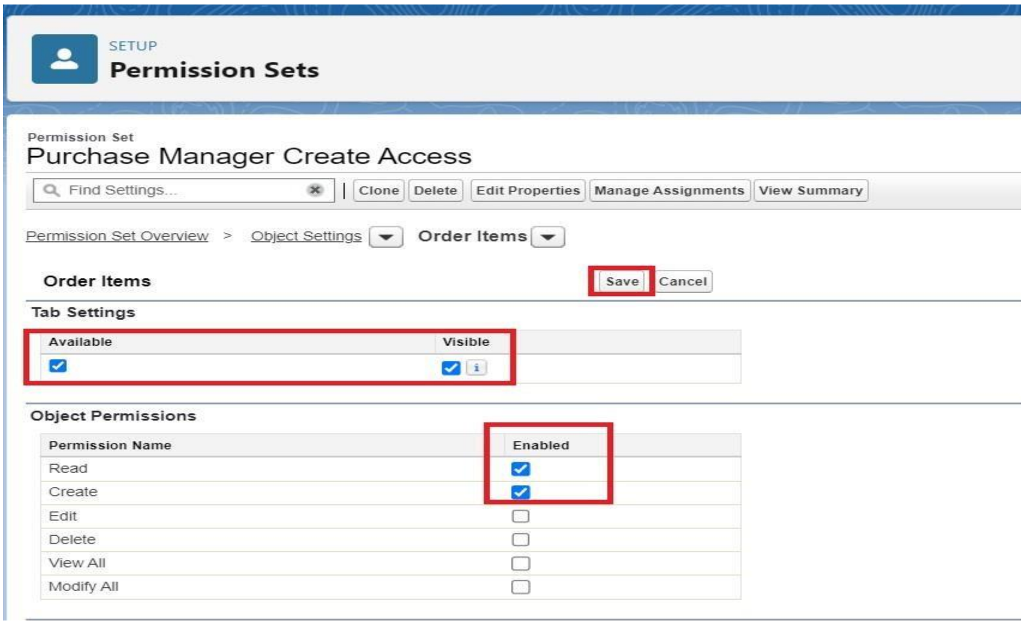
1. Go to setup >> type Permission in quick find box >> Select Permission Set >> click on New.



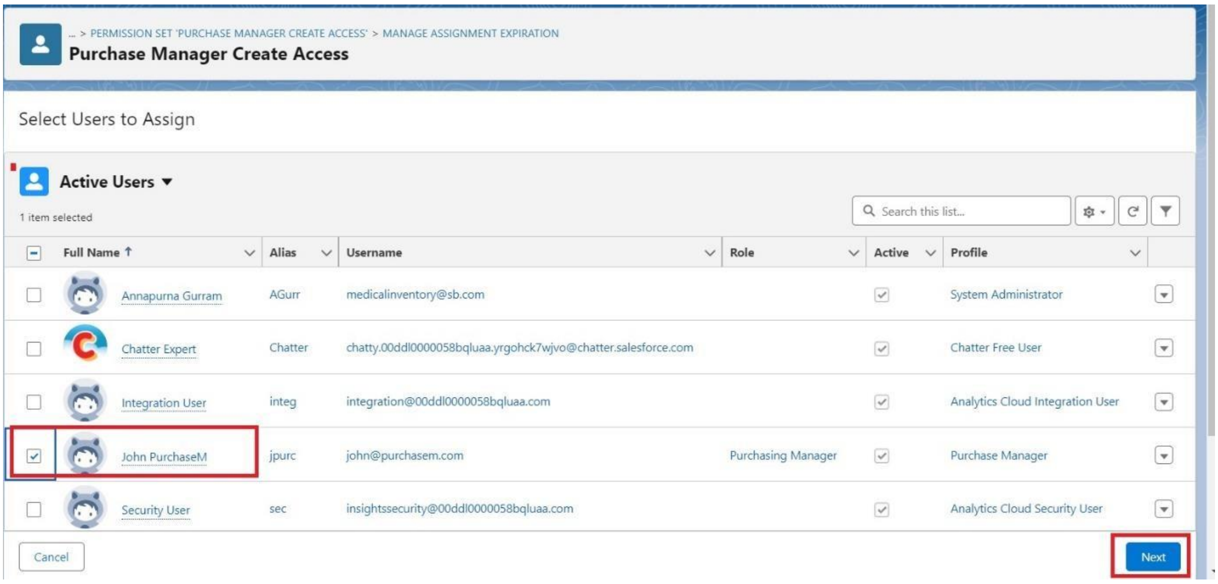
2. Enter Label as Purchase Manager Create Access >> Click on Save.



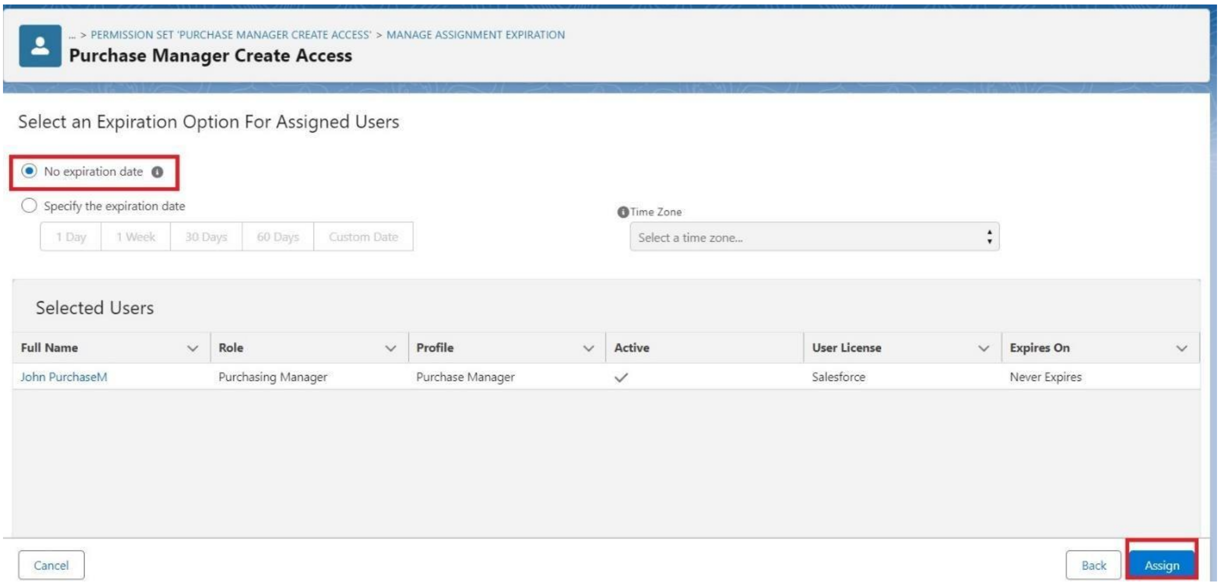
3. From Object Settings >> Select Order Item >> Enable for both Tab Available and Visible >> Enable Read and Create in Object Permissions >> Click on Save.



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.



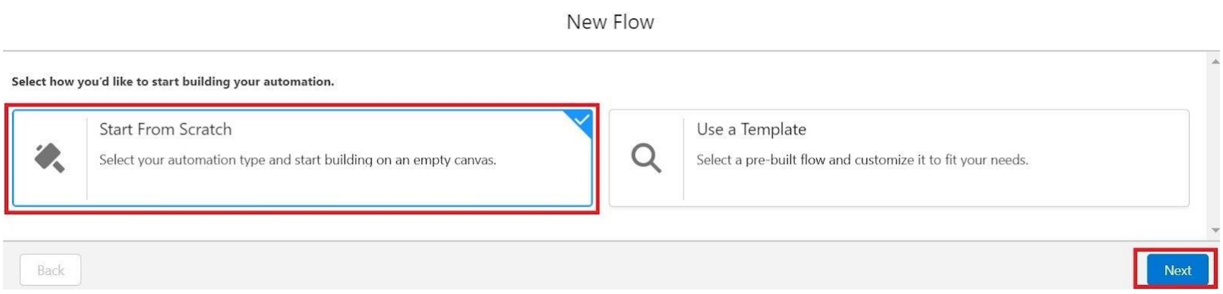
5. Select No Expiration date >> Click on Assign.



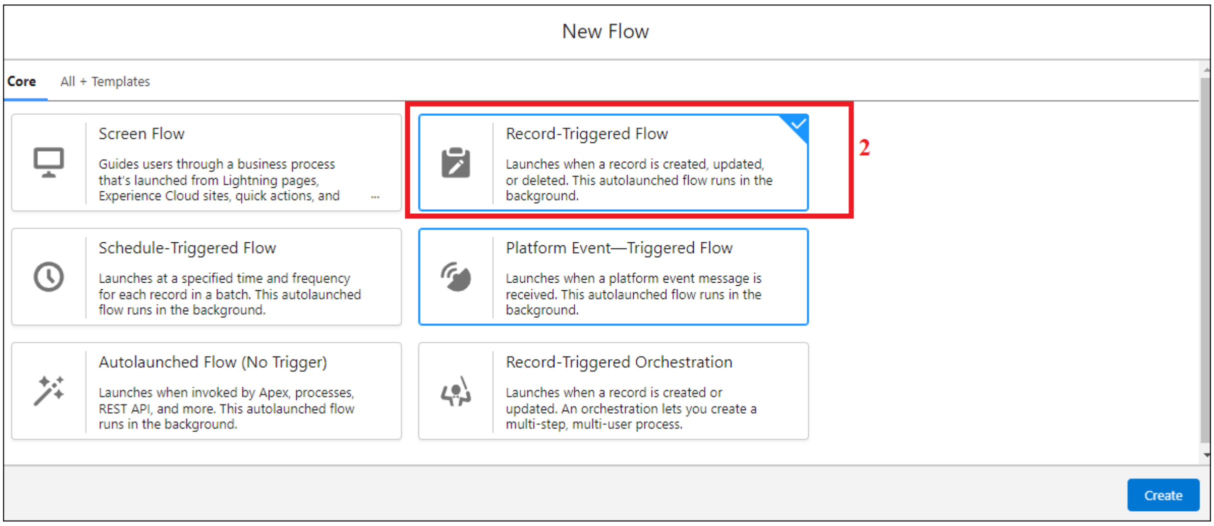
Milestone 12-Flows

Activity 1 : Create Flow to update the Actual Delivery Date.

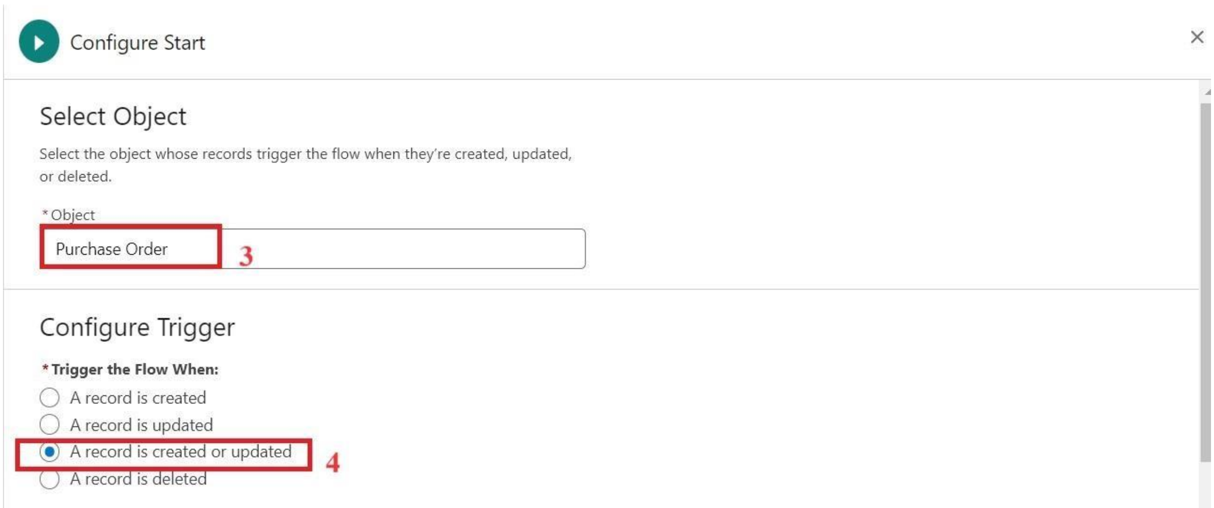
1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow >> Start From Scratch .



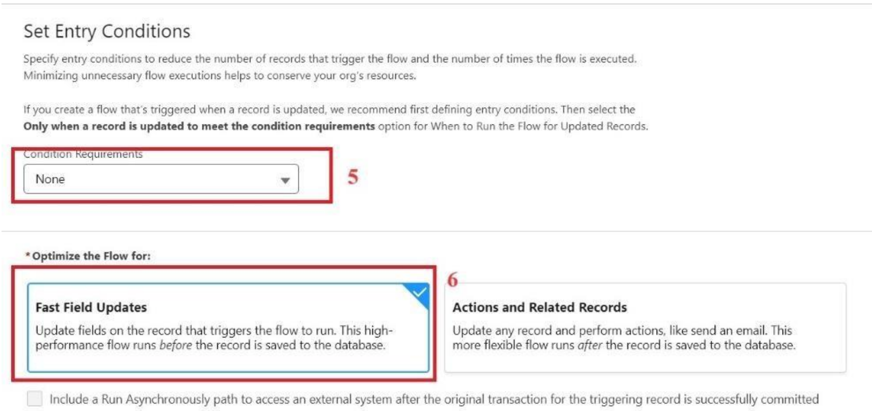
2. Select the record Triggered flow.Click on create.



3. Under Object select "Purchase Order"
4. Select A record is created or updated



5. Set Entry Conditions : None
6. Select Fast Field Updates and click on Done



7. Under the record trigger flow click on the "+" icon and select Get Records.

8. Enter Label as “ Get Purchase Record ”.

9. For Object select Purchase Order.

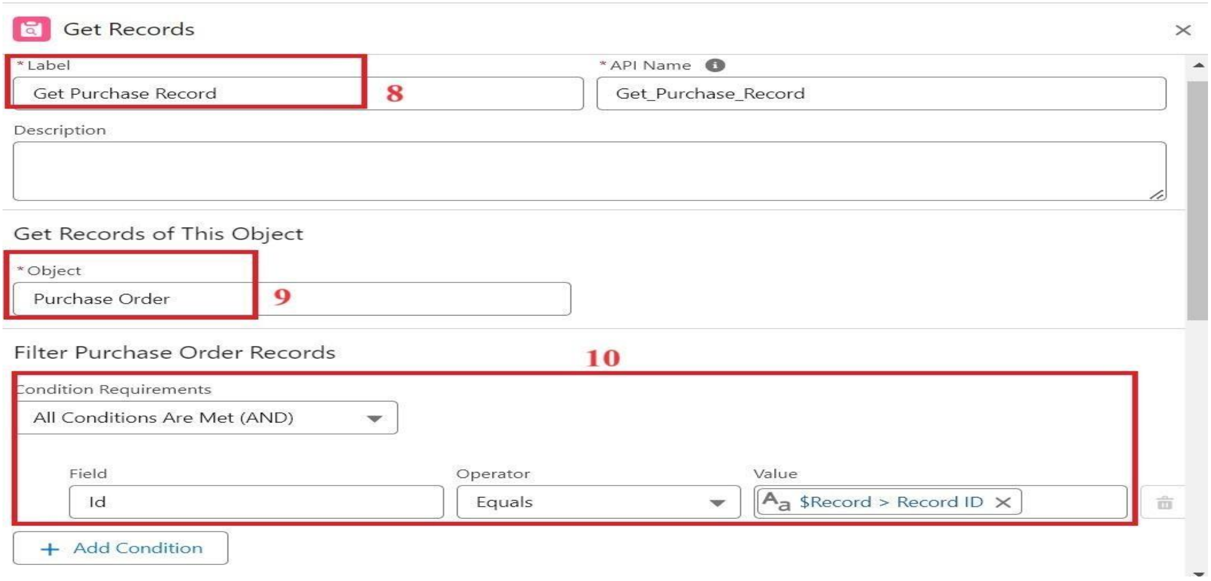
10. For Condition Requirements , select All Conditions are Met(AND)

For the first condition select as follows:

Field: Id

Operator: Equals

Value: {!$Record.Id}



11. For How many Records to store Select Only the First Record.

12. For How to Store Record Data select Choose fields and let Salesforce do the rest. Select Field: Order_Date__c. Click on Done.

Milestone 13-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.

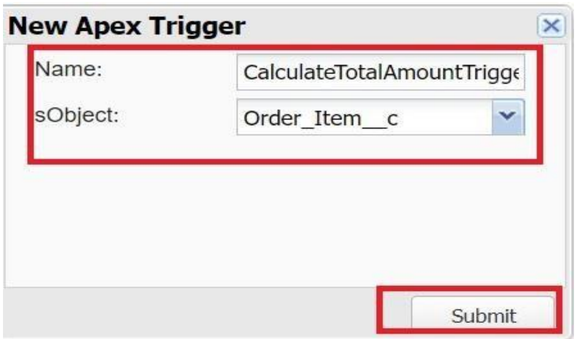
ii) Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

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.



Create an Apex Trigger:

trigger CalculateTotalAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {

// Call the handler class to handle the logic

CalculateTotalAmountHandler.calculateTotal(Trigger.new, Trigger.old, Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete, Trigger.isUndelete);

}

Step 4:

i) In the Developer Console window, go to the top menu and click on "File".

ii) Select New: From the dropdown menu under "File", select "New".

iii) Choose Apex Class: Name it as CalculateTotalAmountHandler

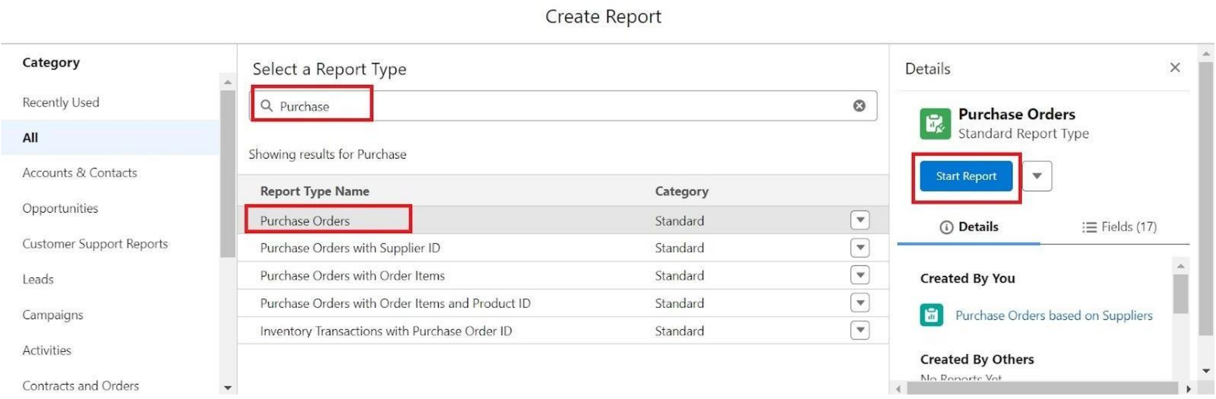
```
public class CalculateTotalAmountHandler {

   // Method to calculate the total amount for Purchase Orders based on related Order Items
   public static void calculateTotal(List<Order_Item__c> newItems, List<Order_Item__c> oldItems, Boolean isInsert, Boolean isUpdate, Boolean isDelete, Boolean isUndelete) {

       // Collect Purchase Order IDs affected by changes in Order_Item__c records
       Set<Id> parentIds = new Set<Id>();

       // For insert, update, and undelete scenarios
       if (isInsert || isUpdate || isUndelete) {
           for (Order_Item__c ordItem : newItems) {
               parentIds.add(ordItem.Purchase_Order_Id__c);
           }
       }

       // For update and delete scenarios
       if (isUpdate || isDelete) {
           for (Order_Item__c ordItem : oldItems) {
               parentIds.add(ordItem.Purchase_Order_Id__c);
           }
       }

       // Calculate the total amounts for affected Purchase Orders
       Map<Id, Decimal> purchaseToUpdateMap = new Map<Id, Decimal>();
```

```
        if (!parentIds.isEmpty()) {
            // Perform an aggregate query to sum the Amount__c for each Purchase Order
            List<AggregateResult> aggrList = [
                SELECT Purchase_Order_Id__c, SUM(Amount__c) totalAmount
                FROM Order_Item__c
                WHERE Purchase_Order_Id__c IN :parentIds
                GROUP BY Purchase_Order_Id__c
            ];

            // Map the result to Purchase Order IDs
            for (AggregateResult aggr : aggrList) {
                Id purchaseOrderId = (Id)aggr.get('Purchase_Order_Id__c');
                Decimal totalAmount = (Decimal)aggr.get('totalAmount');
                purchaseToUpdateMap.put(purchaseOrderId, totalAmount);
            }

            // Prepare Purchase Order records for update
            List<Purchase_Order__c> purchaseToUpdate = new List<Purchase_Order__c>();
            for (Id purchaseOrderId : purchaseToUpdateMap.keySet()) {
                Purchase_Order__c purchaseOrder = new Purchase_Order__c(Id = purchaseOrderId, Total_Order_cost__c = purchaseToUpdateMap.get(purchaseOrderId));
                purchaseToUpdate.add(purchaseOrder);
            }

            // Update Purchase Orders if there are any changes
            if (!purchaseToUpdate.isEmpty()) {
                update purchaseToUpdate;
            }
        }
    }
}
```

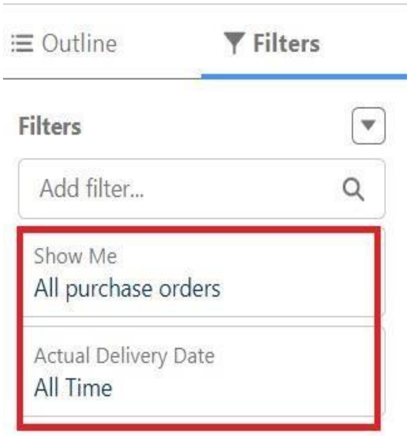
Milestone 14-Reports

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

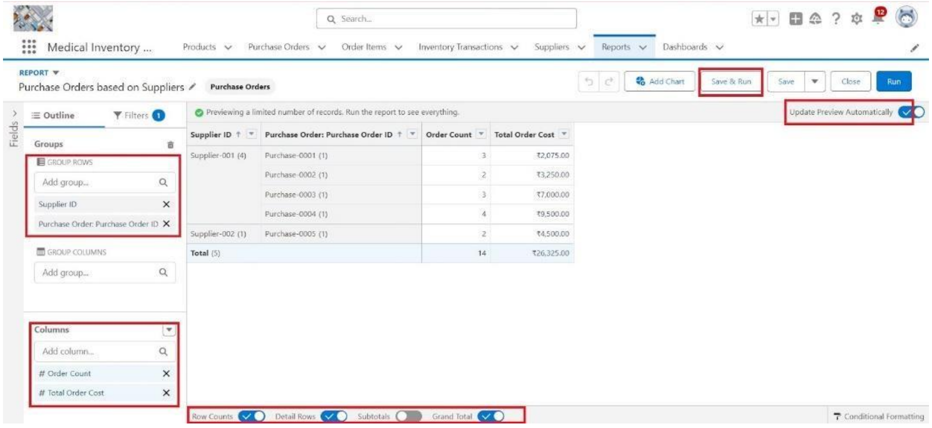


7. Customize your report, in group rows select – Supplier ID, Purchase Order: Purchase Order ID, for columns Order Count, Total Order Cost (In this way we are making a Summary Report).

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

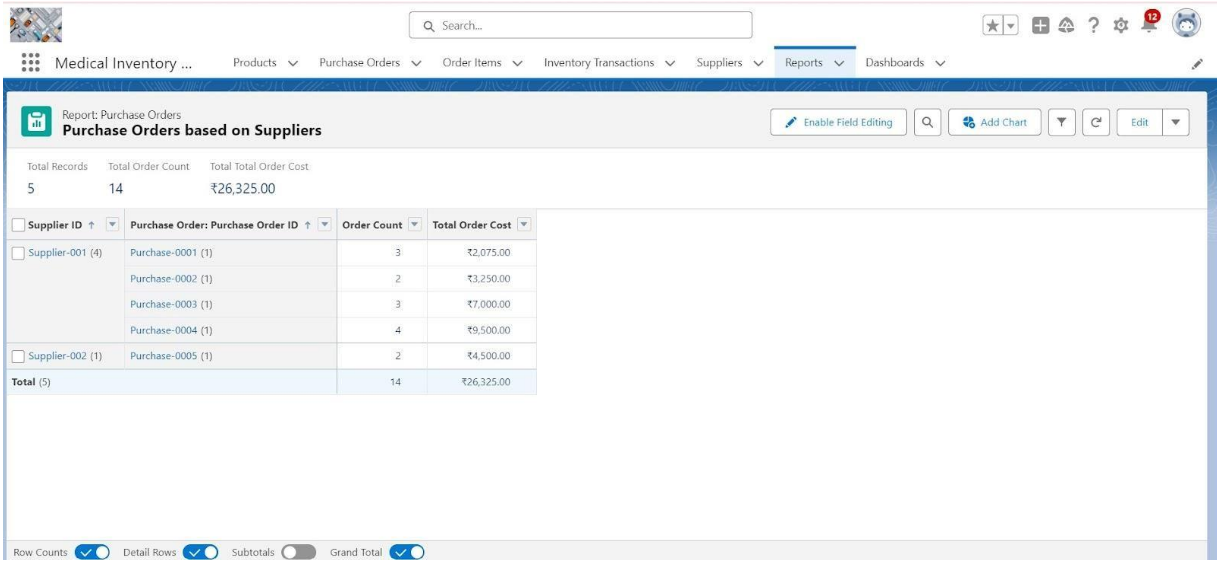
NOTE: In this report you can see your all record of the object you selected for reporting

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



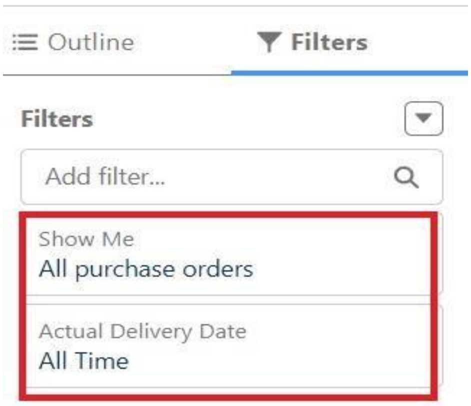
View Report

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

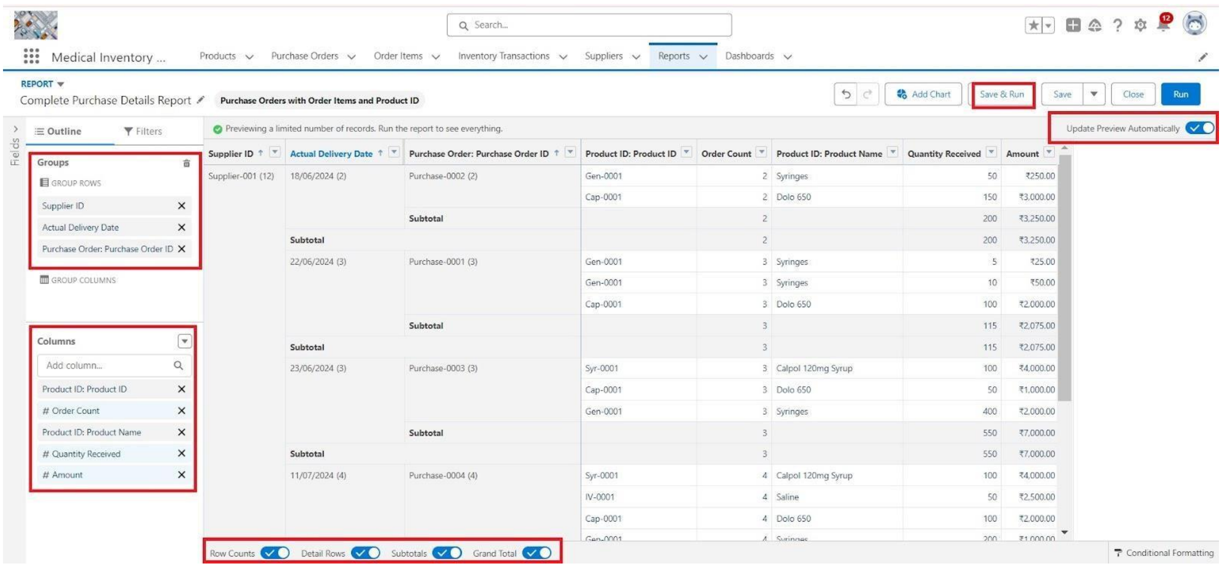


7. Customize your report, in group rows select – Supplier ID, Actual Delivery Date, Purchase Order: Purchase Order ID, for columns Product ID : Product ID, Product ID : Product Name, Order Count, Quantity Received, Amount (In this way we are making a Summary Report).

8. Click save and run

9. Give report name – Complete Purchase Details Report

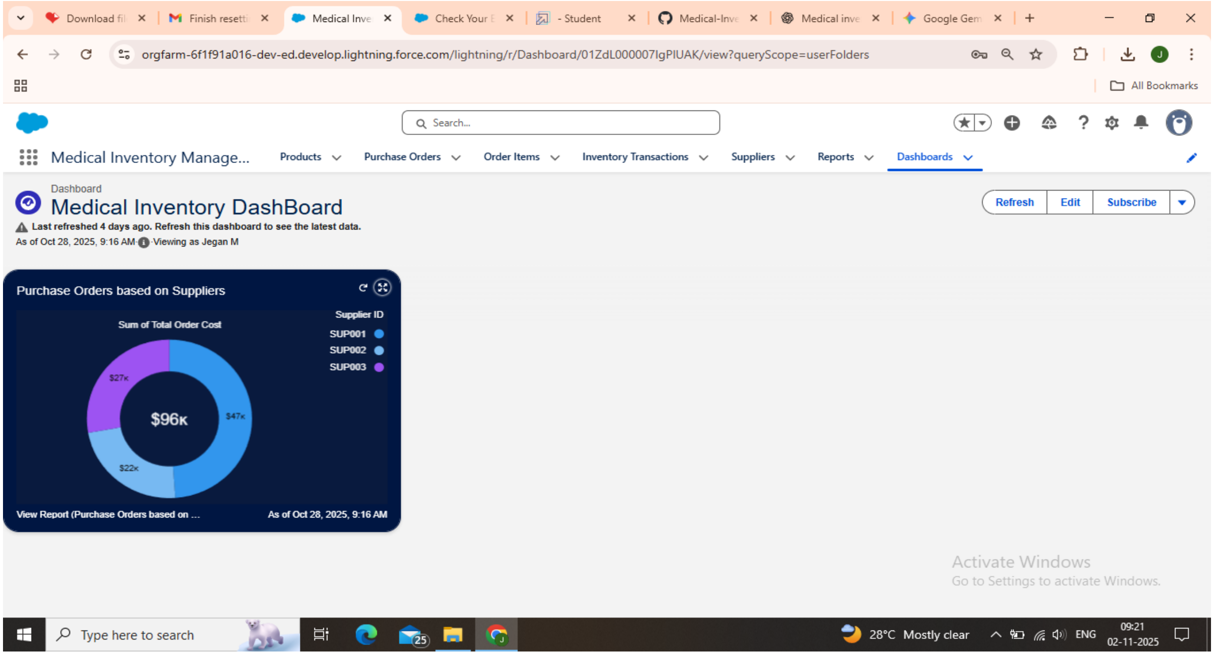
10. Click Save



Milestone14-Dashboard

Activity 1: 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


orgfarm-6f1f91a016-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZdL000007IgPIUAK/view?queryScope=userFolders
Medical Inventory Manage...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Dashboard
Medical Inventory DashBoard
Last refreshed 4 days ago. Refresh this dashboard to see the latest data.
As of Oct 28, 2025, 9:16 AM · Viewing as Jegan M
Refresh
Edit
Subscribe
Purchase Orders based on Suppliers
Sum of Total Order Cost
Supplier ID
SUP001
SUP002
SUP003
$96K
$47K
$27K
$22K
View Report (Purchase Orders based on ...
As of Oct 28, 2025, 9:16 AM
Activate Windows
Go to Settings to activate Windows.
Type here to search
28°C Mostly clear
ENG
09:21
02-11-2025