

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 :

The image consists of two side-by-side screenshots. The left screenshot shows a computer monitor displaying a Salesforce application interface, specifically a data visualization or report page. The right screenshot shows a web-based sign-up form for the 'Salesforce Developer Edition'. The form includes fields for First Name, Last Name, Email, Role, and Company, along with a descriptive text about starting a free trial.

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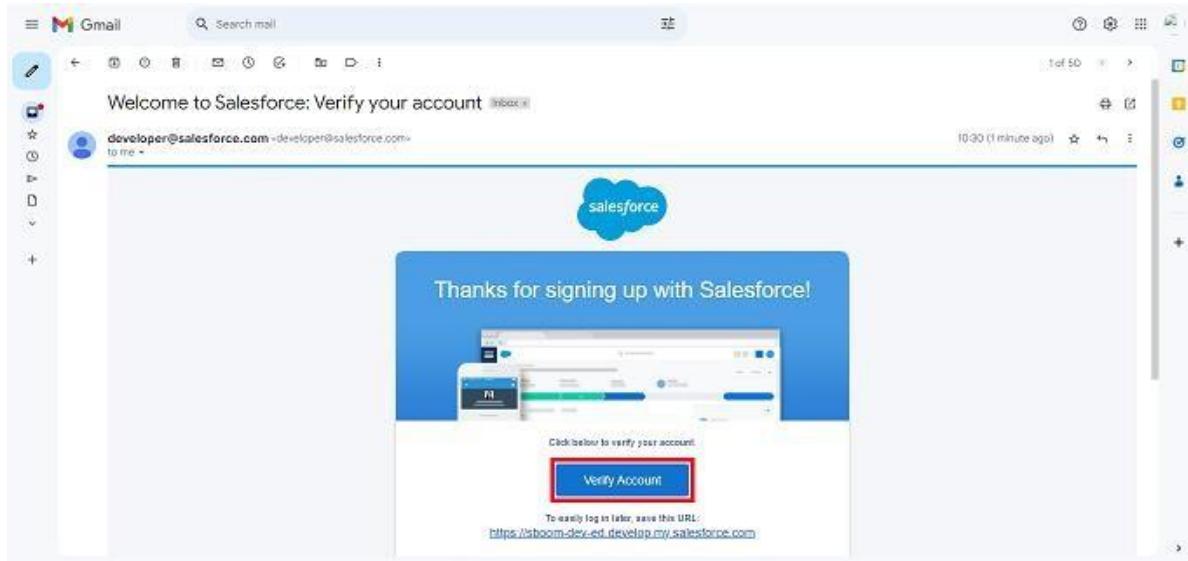
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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

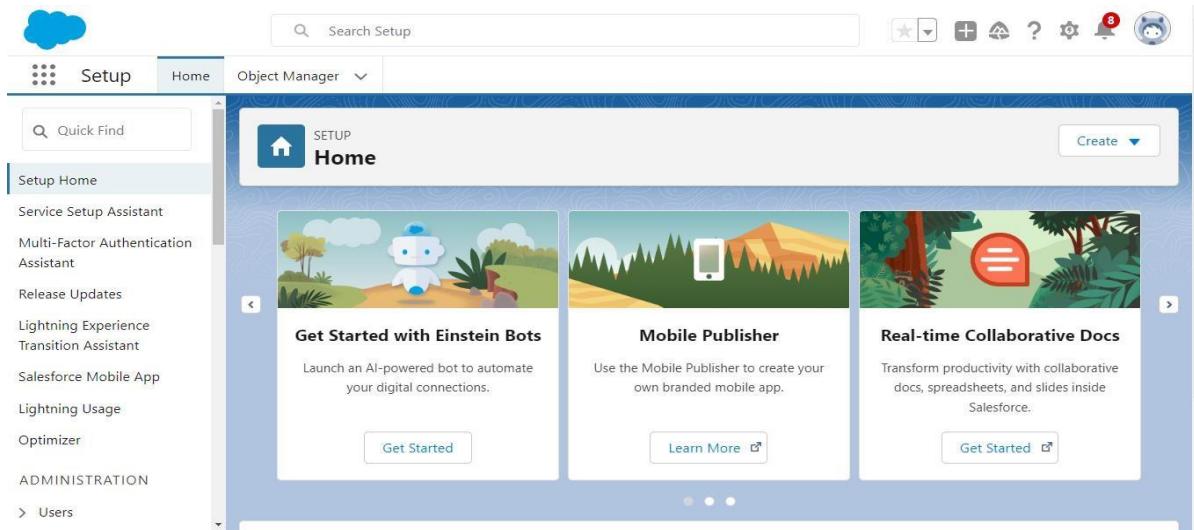
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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

A screenshot of the Salesforce "Change Your Password" page. The title is "Change Your Password". It asks for a new password for "lead@sb.oom" and specifies requirements: "8 characters", "1 letter", and "1 number". The "New Password" field contains "Good" and is marked as "Good". The "Confirm New Password" field contains "Match" and is marked as "Match". The "Security Question" section shows "In what city were you born?" and the "Answer" field contains "asdfghjkl". The "Change Password" button at the bottom is highlighted with a red box.

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

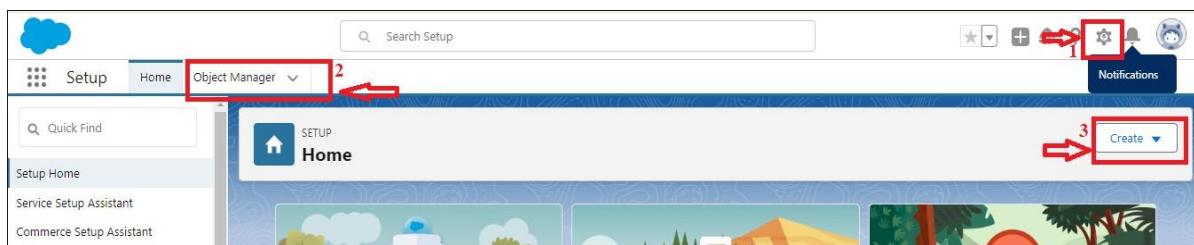


Milestone 2-Objects

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



The screenshot shows the 'Custom Object Definition Edit' page in the Salesforce Setup. The 'Label' field (4) contains 'Product' and the 'Plural Label' field (5) contains 'Products'. The 'Record Name' field (6) contains 'Product ID' and the 'Data Type' dropdown (7) is set to 'Text'. Under 'Optional Features', the 'Allow Reports' checkbox (8) is checked. In the 'Deployment Status' section, the 'Deployed' radio button (9) is selected. At the bottom, the 'Save & New' button (10) is highlighted.

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

The screenshots illustrate the process of creating a custom tab in Salesforce. The top screenshot shows the 'Custom Tabs' page where you can define different types of tabs: Custom Object Tabs, Web Tabs, and Visualforce Tabs. The bottom screenshot shows the detailed configuration for a new custom tab, specifically selecting the 'Product' object as the base for the tab.

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.

New Lightning App

App Details

* App Name Medical Inventory Management 3

* Developer Name Medical_Inventory_Management

Description Enter a description...

App Branding

Image 3 Clear

Primary Color Hex Value #0070D2

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	Selected Items
<input type="checkbox"/> Dash	<input checked="" type="checkbox"/> Products
<input checked="" type="checkbox"/> Dashboards	<input checked="" type="checkbox"/> Purchase Orders
	<input checked="" type="checkbox"/> Order Items
	<input checked="" type="checkbox"/> Inventory Transactions
	<input checked="" type="checkbox"/> Suppliers
	<input checked="" type="checkbox"/> Reports

New Lightning App

User Profiles

Choose the user profiles that can access this app.

7 Available Profiles System Administrator

Selected Profiles

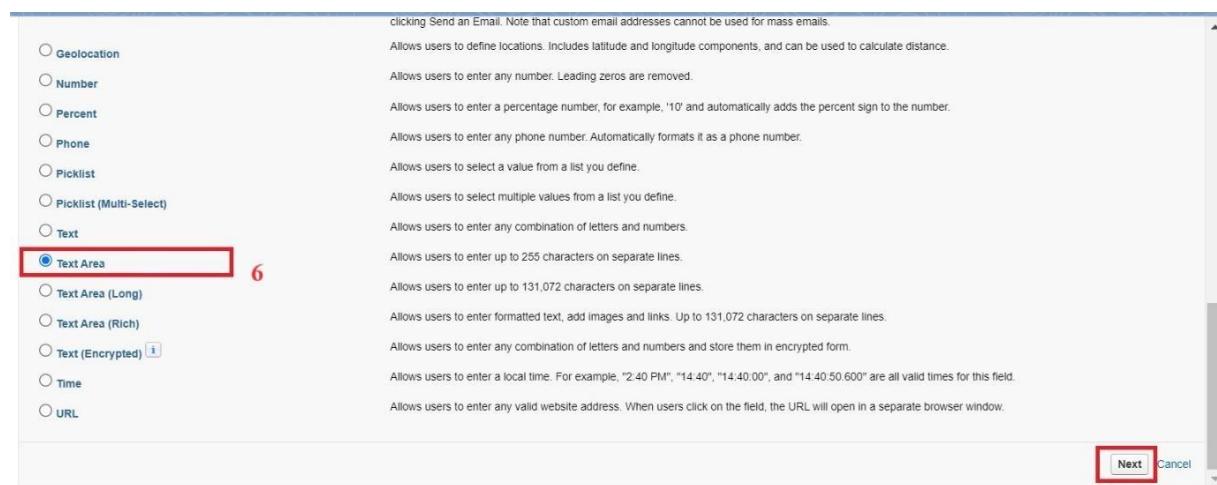
Save & Finish 8

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.



This screenshot shows the 'Step 2. Enter the details' step of the field creation wizard. The 'Field Label' is set to 'Product Description' (labeled 7). The 'Field Name' is set to 'Product_Description'. The 'Description' and 'Help Text' fields are empty. Under 'Required', there is an unchecked checkbox 'Always require a value in this field in order to save a record'. Under 'Auto add to custom report type', there is a checked checkbox 'Add this field to existing custom report types that contain this entity' (labeled 8). The 'Default Value' section contains a 'Show Formula Editor' button and a note about formula syntax. At the top right, it says 'Step 2 of 4' and has 'Previous', 'Next', and 'Cancel' buttons. The 'Next' button is highlighted with a red box.

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.

Step 2. Enter the details

Field Label 5

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length 6 Number of digits to the left of the decimal point
Decimal Places 7 Number of digits to the right of the decimal point

Field Name 8 Description

Help Text

Required Always require a value in this field in order to save a record
Unique Do not allow duplicate values
External ID Set this field as the unique record identifier from an external system

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.

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

Fields

Buttons	Last Modified By	Product ID
Quick Actions	Minimum Stock Level	Product Name
Mobile & Lightning Actions	Owner	Unit Price
Expanded Lookups	Current Stock Level	Product Description
Related Lists	Information (Header visible on edit only)	
Report Charts	* Product ID Sample Text * Product Name Sample Text Product Description Sample Text	

Information (Header visible on edit only)

Product ID	Sample Text	Unit Price	₹123.45
Product Name	Sample Text	Current Stock Level	12,420
Product Description	Sample Text	Minimum Stock Level	21,114
		Owner	Sample Text

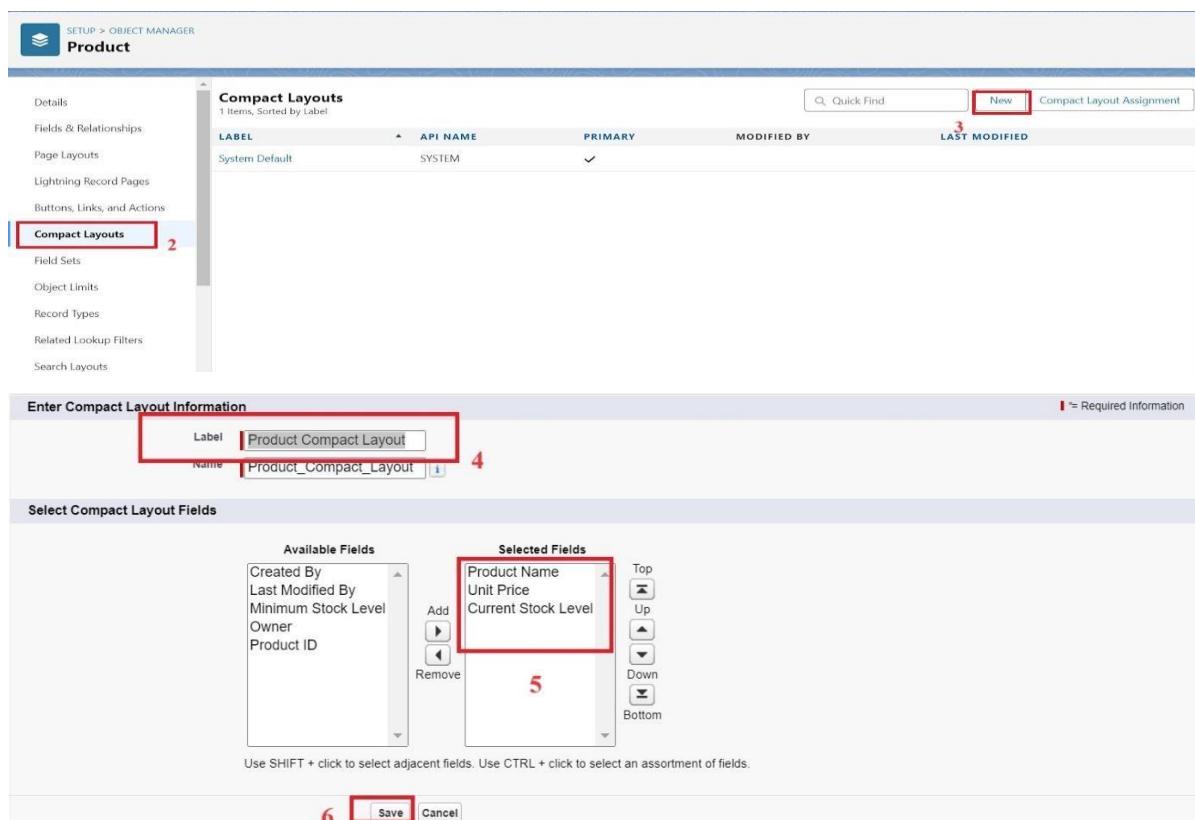
System Information (Header visible on edit only)

Created By Sample Text Last Modified By Sample Text

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.



Product Compact Layouts
Compact Layout Assignment

Primary Compact Layout

Select the compact layout to use when this object's records appear as list items in the mobile app.

Primary Compact Layout: Product Compact Layout 9

10 Save Cancel

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 :
 $(\text{Expected_Delivery_Date_c} - \text{Order_Date_c}) > 7$

Purchase Order Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Help for this Page ?

Rule Name: Expected_Delivery_Date_Validation 3

Active 4

Description:

Error Condition Formula

Example: Discount_Percent_c>0.30 [More Examples...](#)

If this formula expression is true, display the text defined in the Error Message area

Functions

-- All Function Categories -- ▾

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Field Insert Operator ▾ 5

(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.

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message The Expected Delivery Date should not exceed 7 days. **6**

This error message can either appear at the top of the page or below a specific field on the page

Error Location Top of Page Field **7** **8**

Save **Save & New** **Cancel**

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.

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input type="checkbox"/>

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	Inventory Manager

Save **Cancel**

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

Custom App Settings			Visible		Default		Visible			Default	
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>						
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>						
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>						
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>						
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>						
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>						
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>						
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>						
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>						
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>						
Medical Inventory Management (Medical_Inventory_Management)	<input type="checkbox"/>	<input checked="" type="radio"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="radio"/>						
Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>									

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

Custom Object Permissions											
	Basic Access						Data Administration				
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All
Inventory Transactions	<input checked="" type="checkbox"/>										
Order Items	<input checked="" type="checkbox"/>										
Products	<input checked="" type="checkbox"/>										
Purchase Orders	<input checked="" type="checkbox"/>										
Suppliers	<input checked="" type="checkbox"/>										

5. Change the password policies as mentioned :
 6. User passwords expire in should be “ never expires ”.
 7. Minimum password length should be “ 8 ”, and click save.

Password Policies	
User passwords expire in	<input type="text" value="Never expires"/>
Enforce password history	<input type="text" value="3 passwords remembered"/>
Minimum password length	<input type="text" value="8"/>
Password complexity requirement	<input type="text" value="Must include alpha and numeric characters"/>
Password question requirement	<input type="text" value="Cannot contain password"/>
Maximum invalid login attempts	<input type="text" value="10"/>
Lockout effective period	<input type="text" value="15 minutes"/>
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>
Don't immediately expire links in forgot password emails	<input type="checkbox"/>
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>	

Milestone 10-Roles

Activity 1 : Create a Purchasing Manager Role.

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

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy
View other sample Role Hierarchies [Territory-based Sample](#)

Executive Staff

```

graph TD
    CEO[CEO - President] --> CFO[CFO - VP, Sales]
    CFO --> SalesDir[Sales Director]
    CFO --> IntDir[International Sales Director]
    SalesDir --> WestDir[Western Sales Director]
    SalesDir --> EastDir[Eastern Sales Director]
    IntDir --> NYRep[NY Sales Rep]
    IntDir --> EWRRep[EU Sales Rep]
    NYRep --> CARep[CA Sales Rep]
    NYRep --> CHRep[CH Sales Rep]
    EWRRep --> BERep[BE Sales Rep]
    EWRRep --> DERep[DE Sales Rep]
    CARep --> SFRep[SF Sales Rep]
    CARep --> ORRep[OR Sales Rep]
    CHRep --> CHRep[CH Sales Rep]
    BERep --> BERep[BE Sales Rep]
    DERep --> DERep[DE Sales Rep]
  
```

Set Up Roles

Don't show this page again

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.

Role Edit
New Role

Role Edit

Label	Purchasing Manager
Role Name	Purchasing_Manager
This role reports to	SVP, Sales & Marketing

Role Name as displayed on reports

Save Save & New Cancel

Activity 2 : Create a Purchasing Manager Role.

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

The screenshot shows the Salesforce Setup Roles page. The left sidebar has sections for Sales, Service, and Case Teams, with 'Contact Roles' expanded under Sales. The main area displays a 'Sample Role Hierarchy' diagram. At the top is 'Executive Staff' (CEO, President, CFO, VP, Sales). Below them are 'Western Sales Director' (Western Sales Rep, CA Sales Rep, OR Sales Rep), 'Eastern Sales Director' (NY Sales Rep, MA Sales Rep), and 'International Sales Director' (Asian Sales Rep, European Sales Rep). Arrows indicate reporting relationships from the lower-level roles up to their respective directors. A note states: 'View & edit data, roll up forecasts, & generate reports for all users directly or at same level' for the directors. Another note states: 'View & edit data, roll up forecasts, & generate reports for all users directly or at same level' for the sales reps. A 'Set Up Roles' button and a 'Don't show this page again' checkbox are at the bottom.

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.

The screenshot shows the 'Role Edit' page for creating a new role. The 'Label' field is set to 'Inventory Manager'. The 'Role Name' field is set to 'Inventory_Manager'. The 'This role reports to' dropdown is set to 'SVP, Sales & Marketing'. A red box highlights these three fields. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons, with 'Save' being highlighted.

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.

The screenshot shows the 'Permission Sets' page in the Salesforce Setup. The left sidebar includes a search bar ('Q. Permission'), 'Users' section, 'Permission Set Groups' section with a 'Permission Sets' button highlighted by a red box, 'Custom Code', and 'Custom Permissions'. A note at the bottom says ' Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Permission Sets' and contains a table with columns: Action, Permission Set Label, Description, and License. The table lists various permission sets like 'Buyer', 'CRM User', 'Commerce Admin', etc. The 'Label' column for each row is 'Purchase Manager Create Access'.

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

The screenshot shows the 'Create Permission Set' page. It has a 'Label' field containing 'Purchase Manager Create Access' which is highlighted by a red box. Other fields include 'API Name' (Purchase_Manager) and a 'Description' text area. At the top right are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box. A note at the bottom right indicates that the 'Label' field is required.

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

The screenshot shows the 'Purchase Manager Create Access' object settings page. Under 'Tab Settings', the 'Available' and 'Visible' checkboxes are checked and highlighted by a red box. Under 'Object Permissions', the 'Read' and 'Create' checkboxes are checked and highlighted by a red box. At the top right are 'Save' and 'Cancel' buttons, with 'Save' highlighted by a red box.

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.

Purchase Manager Create Access

Select Users to Assign

Active Users

Full Name ↑	Alias	Username	Role	Active	Profile
Annapurna Gurrum	AGurr	medicalinventory@sb.com		<input checked="" type="checkbox"/>	System Administrator
Chatter Expert	Chatter	chatty.00dd0000058bqluaayrgohck7wjvo@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Integration User	integ	integration@00dd0000058bqluaam		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
John PurchaseM	jpurc	john@purchasem.com	Purchasing Manager	<input checked="" type="checkbox"/>	Purchase Manager
Security User	sec	insightssecurity@00dd0000058bqluaam		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Next

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

Purchase Manager Create Access

Select an Expiration Option For Assigned Users

No expiration date (1)

Specify the expiration date

1 Day | 1 Week | 30 Days | 60 Days | Custom Date

Time Zone: Select a time zone...

Selected Users

Full Name	Role	Profile	Active	User License	Expires On
John PurchaseM	Purchasing Manager	Purchase Manager	<input checked="" type="checkbox"/>	Salesforce	Never Expires

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 .

New Flow

Select how you'd like to start building your automation.

Start From Scratch
Select your automation type and start building on an empty canvas.

Use a Template
Select a pre-built flow and customize it to fit your needs.

Back **Next**

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

New Flow

Core All + Templates

- Screen Flow
- Record-Triggered Flow** 2
- Schedule-Triggered Flow
- Platform Event—Triggered Flow
- Autolaunched Flow (No Trigger)
- Record-Triggered Orchestration

Create

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

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object 3

Purchase Order

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated 4
- A record is deleted

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

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None 5

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

6

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 }

Get Records

* Label: Get Purchase Record **8**

* API Name: Get_Purchase_Record

Description:

Get Records of This Object

* Object: Purchase Order **9**

Filter Purchase Order Records **10**

Condition Requirements: All Conditions Are Met (AND)

Field: Id	Operator: Equals	Value: Aa \$Record > Record ID X
-----------	------------------	----------------------------------

+ Add Condition

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.

How Many Records to Store

Only the first record

All records

How to Store Record Data

Automatically store all fields

Choose fields and let Salesforce do the rest

Choose fields and assign variables (advanced)

Select Purchase Order Fields to Store in Variable

Field: ID

Field: Order_Date__c **11**

+ Add Field

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.

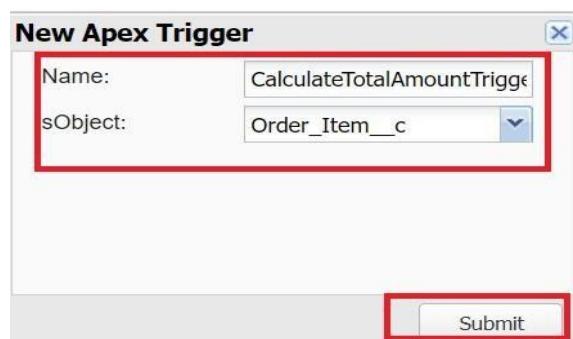
ii) Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

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.

The screenshot shows the 'Create Report' screen. On the left, there's a sidebar with categories like 'Recently Used', 'All', 'Accounts & Contacts', 'Opportunities', 'Customer Support Reports', 'Leads', 'Campaigns', 'Activities', and 'Contracts and Orders'. A search bar at the top says 'Select a Report Type' with 'Purchase' typed in. Below it, a table lists report types: 'Purchase Orders' (selected), 'Purchase Orders with Supplier ID', 'Purchase Orders with Order Items', 'Purchase Orders with Order Items and Product ID', and 'Inventory Transactions with Purchase Order ID'. To the right, a 'Details' panel shows a summary for 'Purchase Orders' (Standard Report Type) with a 'Start Report' button highlighted by a red box. Other sections include 'Created By You' and 'Created By Others'.

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

The screenshot shows the 'Filters' section. It has a 'Filters' button and a 'Show Me' dropdown menu. The 'Show Me' menu is expanded, showing 'All purchase orders' (which is also highlighted with a red box). Below it, another dropdown menu shows 'Actual Delivery Date' and 'All Time'.

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”)

REPORT ▾ Purchase Orders based on Suppliers ▾ Purchase Orders

Fields

Groups

Supplier ID ▾ Purchase Order: Purchase Order ID ▾ Order Count ▾ Total Order Cost ▾

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
Supplier-001 (4)	Purchase-0001 (1)	3	₹2,075.00
	Purchase-0002 (1)	2	₹3,250.00
	Purchase-0003 (1)	3	₹7,000.00
	Purchase-0004 (1)	4	₹9,500.00
Supplier-002 (1)	Purchase-0005 (1)	2	₹4,500.00
Total (5)		14	₹26,325.00

Columns

Add column... ▾ # Order Count ▾ # Total Order Cost ▾

Row Counts Detail Rows Subtotals Grand Total Conditional Formatting

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.

Report: Purchase Orders
Purchase Orders based on Suppliers

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

Supplier ID	Purchase Order: Purchase Order ID	Order Count	Total Order Cost
Supplier-001 (4)	Purchase-0001 (1)	3	₹2,075.00
	Purchase-0002 (1)	2	₹3,250.00
	Purchase-0003 (1)	3	₹7,000.00
	Purchase-0004 (1)	4	₹9,500.00
Supplier-002 (1)	Purchase-0005 (1)	2	₹4,500.00
Total (5)		14	₹26,325.00

Row Counts Detail Rows Subtotals Grand Total

Activity 2: Create a Complete Purchase Details Report

1. Click App Launcher
2. Select Medical Inventory Management App
3. Click on Reports tab
4. Click on New Report.
5. Click the report type as Purchase Orders with Order Items and Product ID >> Click Start report.
6. Click on Filters and select as follows and click on Apply

Outline Filters

Filters

Add filter... 🔍

Show Me
All purchase orders

Actual Delivery Date
All Time

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

The screenshot shows the 'Complete Purchase Details Report' interface. At the top, there are navigation tabs: Products, Purchase Orders, Order Items, Inventory Transactions, Suppliers, Reports, and Dashboards. Below the tabs is a search bar and a toolbar with buttons for Add Chart, Save & Run, Save, Close, and Run.

The main area displays a table of purchase order items. The table has the following columns:

- Supplier ID
- Actual Delivery Date
- Purchase Order: Purchase Order ID
- Product ID: Product ID
- Order Count
- Product ID: Product Name
- Quantity Received
- Amount

The table is grouped by Supplier ID and Actual Delivery Date. Subtotals are shown for each group. The data includes various products like Syringes, Dolo 650, Calpol 120mg Syrup, Saline, and others, with their respective quantities and amounts.

On the left side, there are 'Groups' and 'Columns' configuration panels, both highlighted with red boxes. The 'Groups' panel lists 'Supplier ID' and 'Actual Delivery Date' under 'GROUP ROWS'. The 'Columns' panel lists 'Product ID: Product ID', '# Order Count', 'Product ID: Product Name', '# Quantity Received', and '# Amount' under 'GROUP COLUMNS'.

At the bottom of the table, there are checkboxes for Row Counts, Detail Rows, Subtotals, and Grand Total, all of which are checked.

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

Screenshot of a Microsoft Edge browser window displaying a Salesforce Lightning dashboard titled "Medical Inventory DashBoard".

The dashboard shows a donut chart titled "Purchase Orders based on Suppliers" with the following data:

Supplier ID	Sum of Total Order Cost
SUP001	\$27k
SUP002	\$47k
SUP003	\$22k

The total sum of total order cost is \$96k.

Other sections visible on the dashboard include "Products", "Purchase Orders", "Order Items", "Inventory Transactions", "Suppliers", "Reports", and "Dashboards".

The status bar at the bottom of the screen shows the Windows taskbar with a search bar, pinned icons for File Explorer, Mail, and Google Chrome, and system information including weather (28°C Mostly clear), language (ENG), and date (02-11-2025).

