MEDICAL INVENTARY MANAGEMENT

GOVERNMENT ARTS COLLEGE-CBE

COLLEGE CODE-asbru0012

Team ID : NM2025TMID23456

Team Size : 4

Team Leader : MITHRADEVI.R
EMAIL: mithrar287@gmail.com

Team member : JENIPHA S
EMAIL: jeniphajeni21@gmial.com

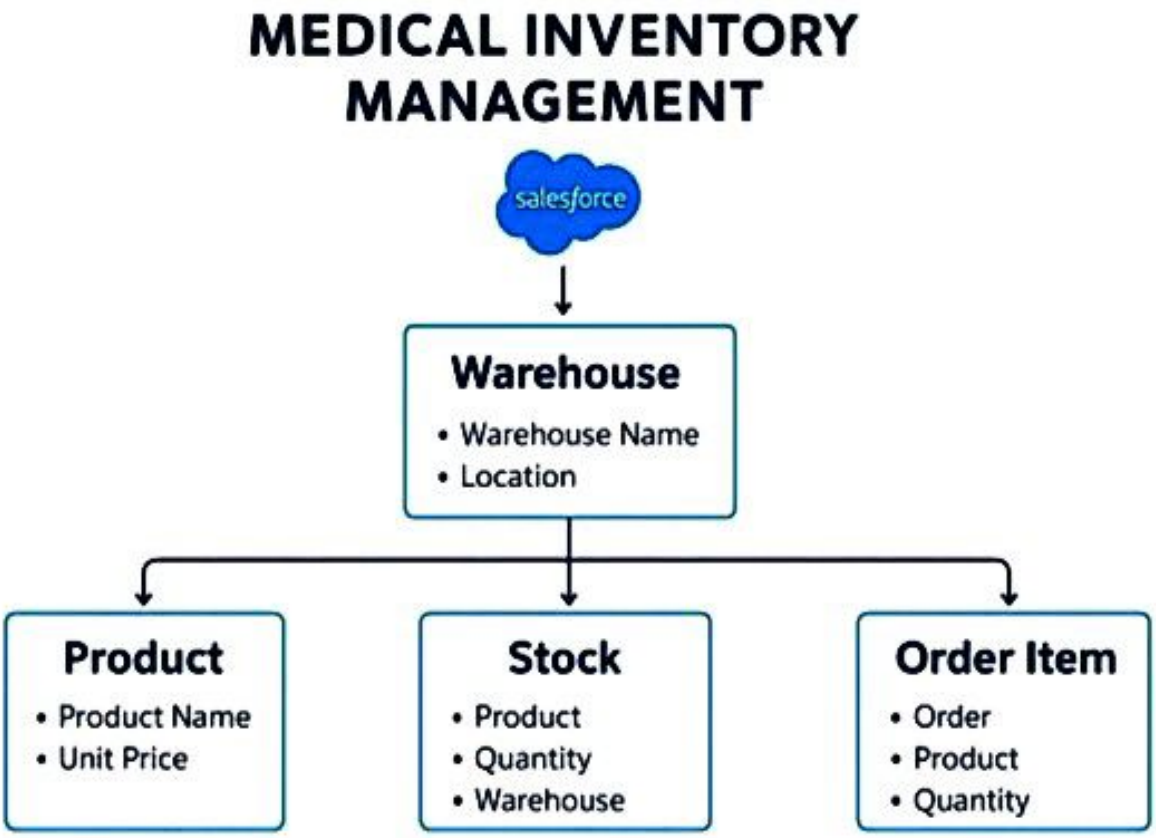
Team member : M SASIREKHA
EMAIL: sasimanimalar2005@gmail.com

Team member : SHANKARI.M
EMAIL: shankarishankari279@gmail.com

MEDICAL INVENTORY MANAGEMENT

1.INTRODUCTION

1.1 Project Overview



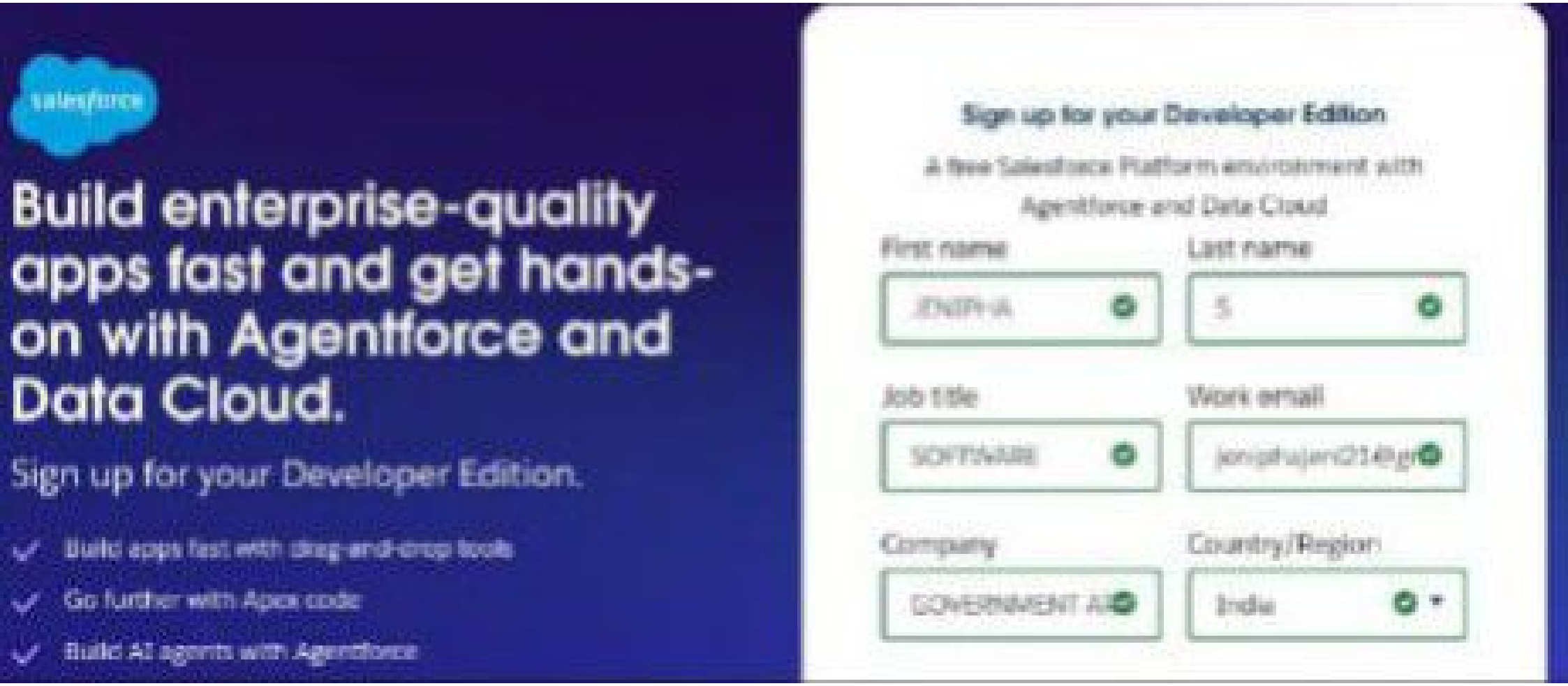
1.2 Purpose

The purpose of a **Medical Inventory Management System** in Salesforce is to track medicines and supplies efficiently, avoid shortages or overstocking, and ensure timely availability for patient care. It automates stock updates, purchase orders, and alerts while maintaining accurate data for compliance. With real-time reports and dashboards, it improves decision-making, reduces errors, and supports better healthcare delivery.

DEVELOPMENT PHASE

Creating Developer Account:

By using this URL - **https://www.salesforce.com/form/developer-signup/?d=pb**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Job title
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Company
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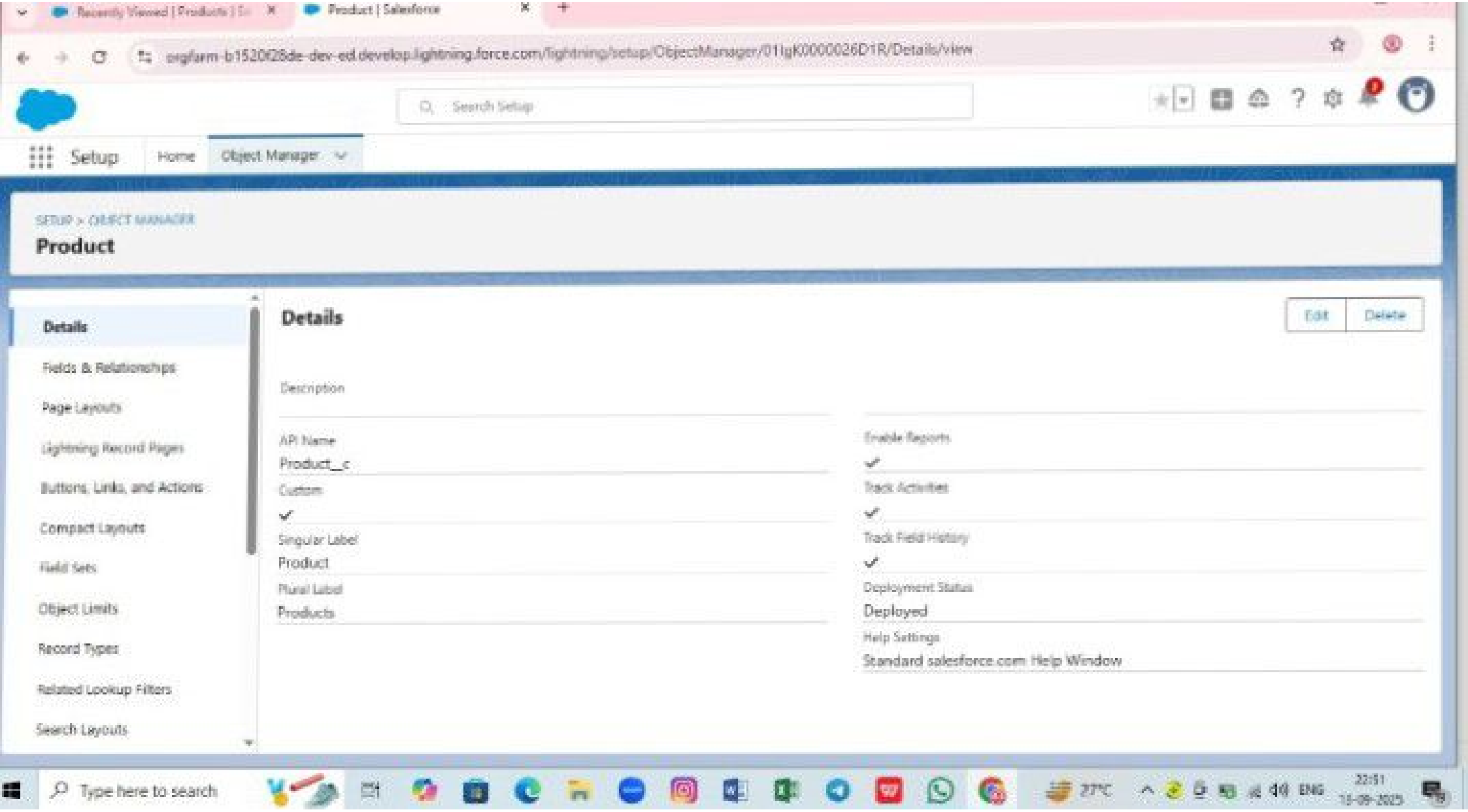
India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Search Setup
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Object Manager
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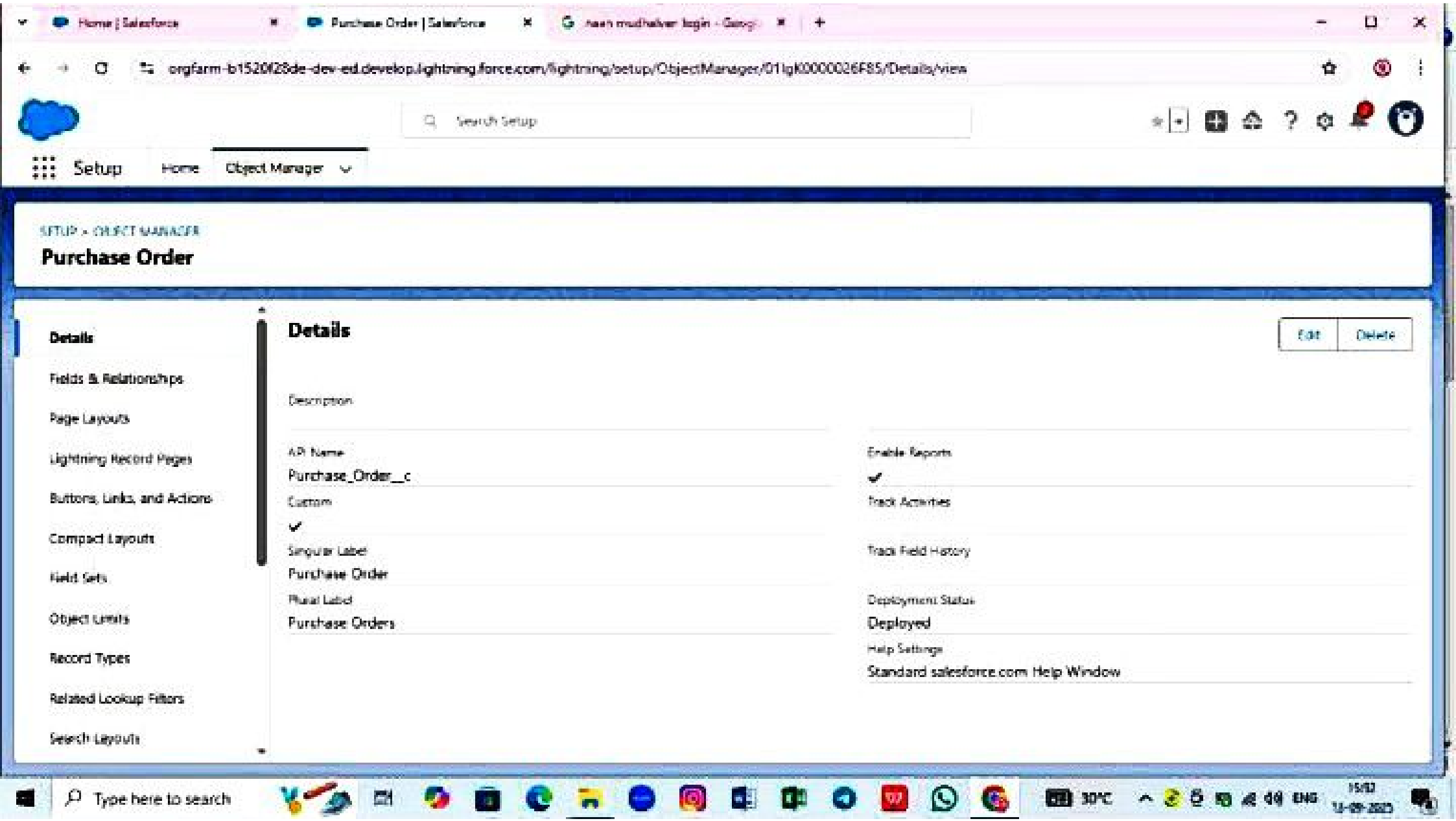
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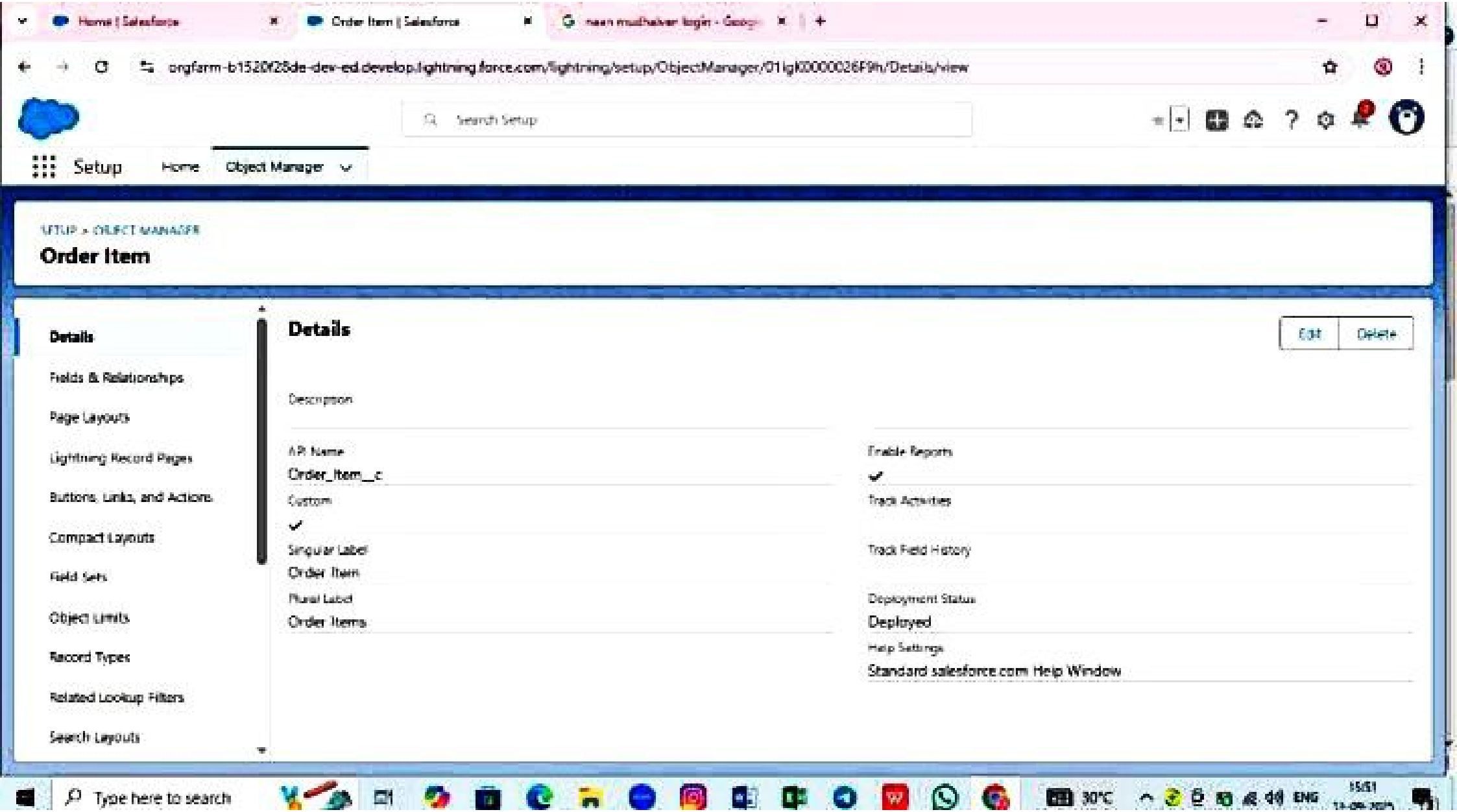
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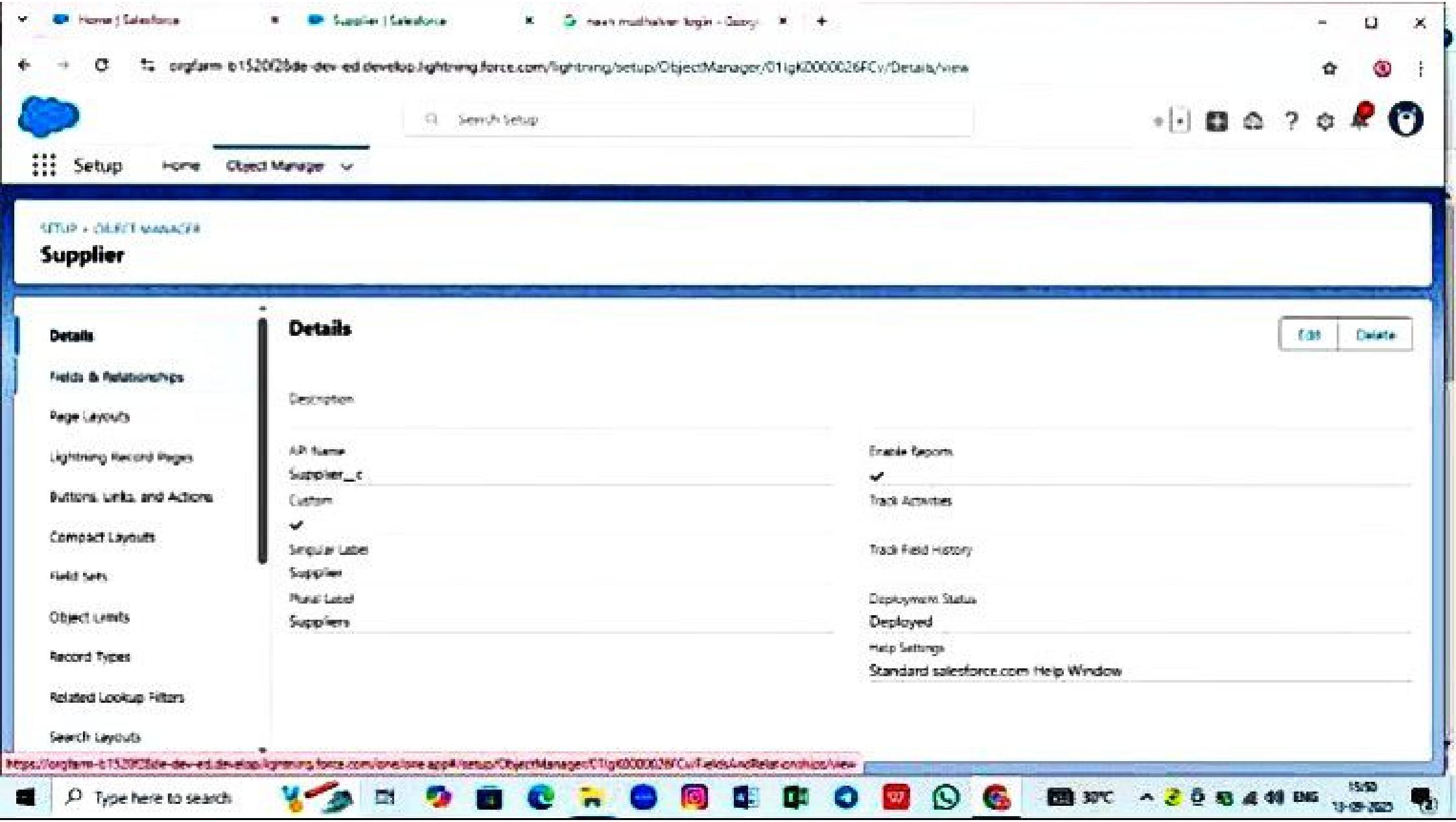
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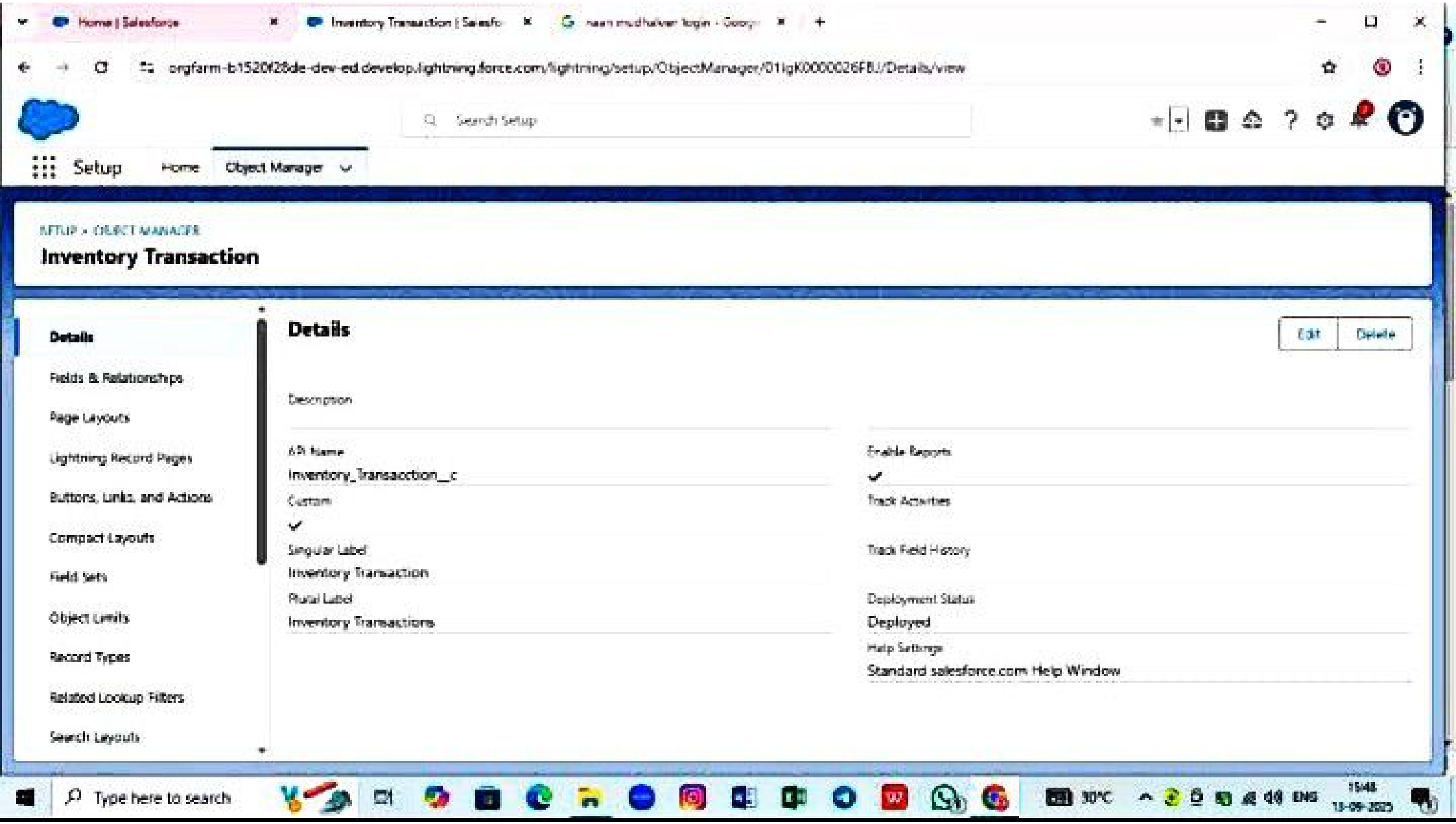
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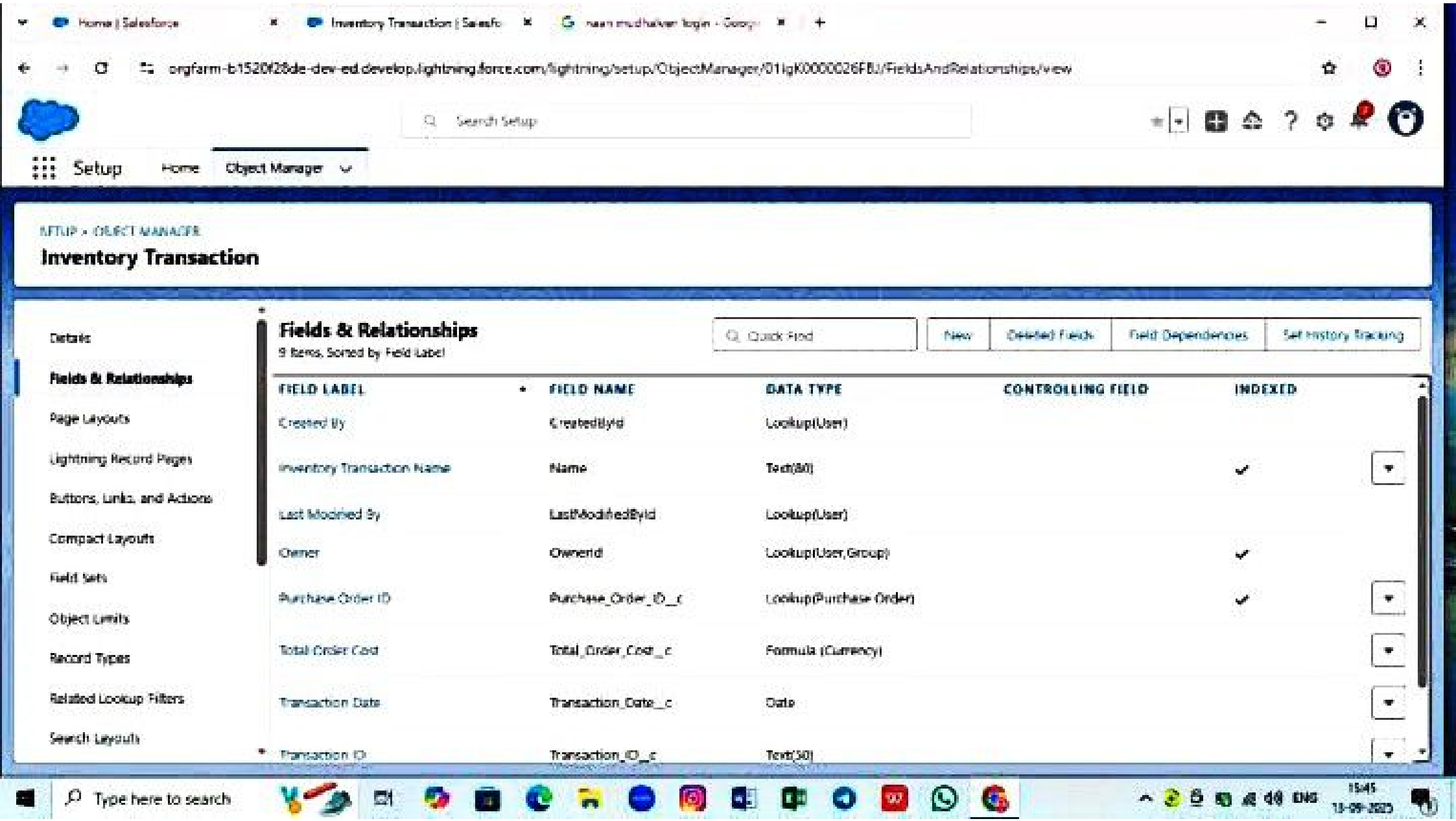
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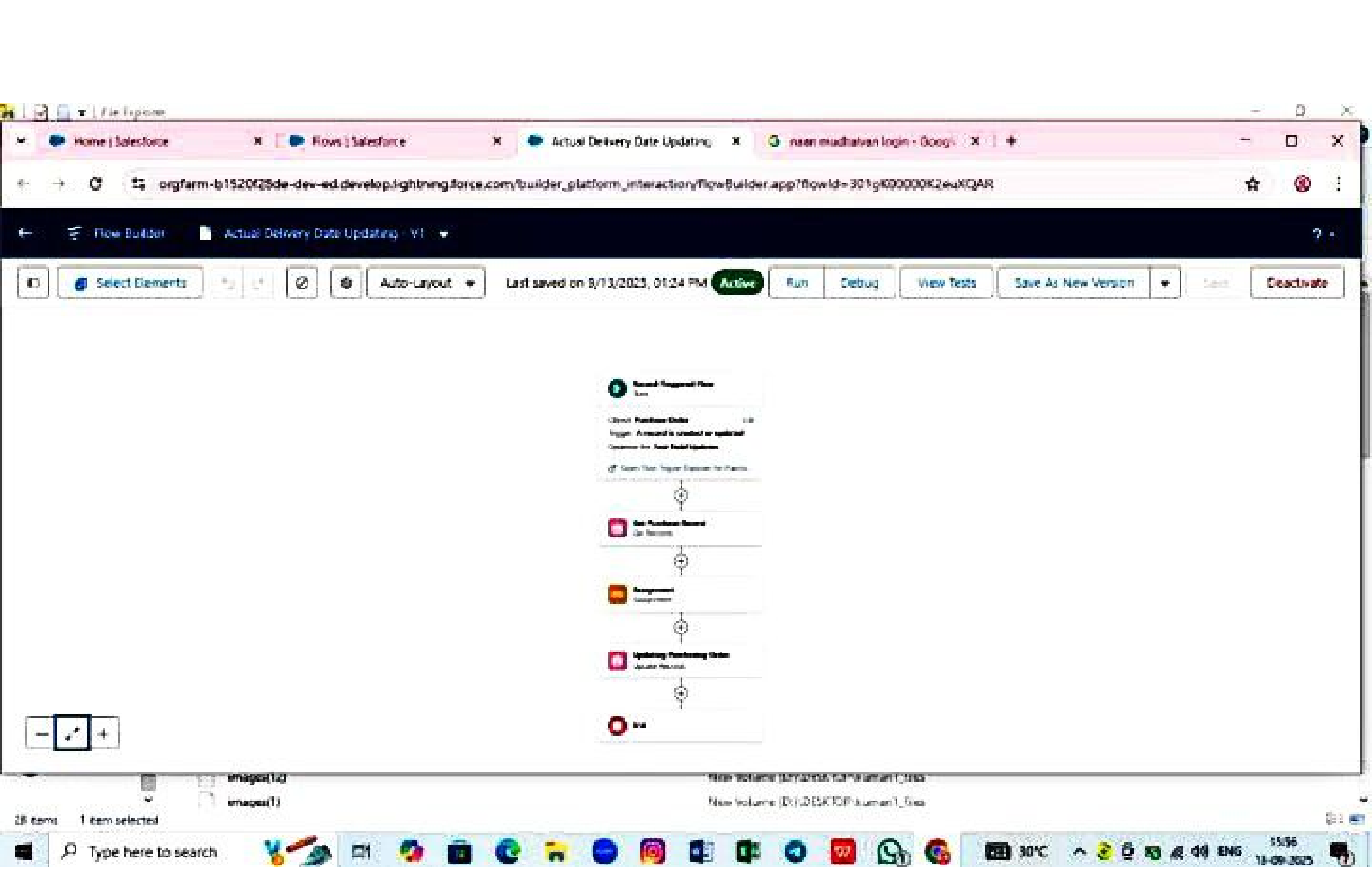
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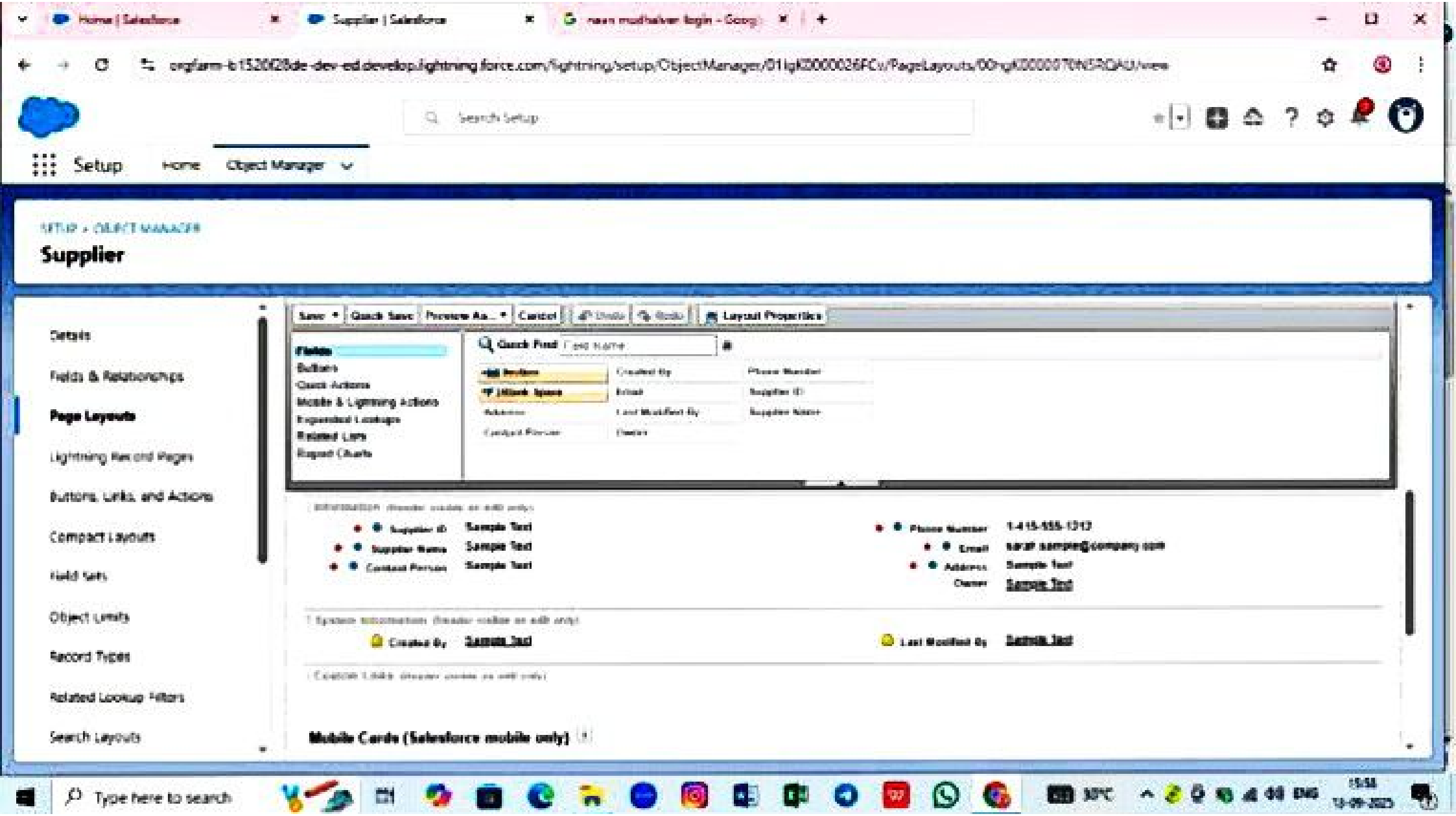
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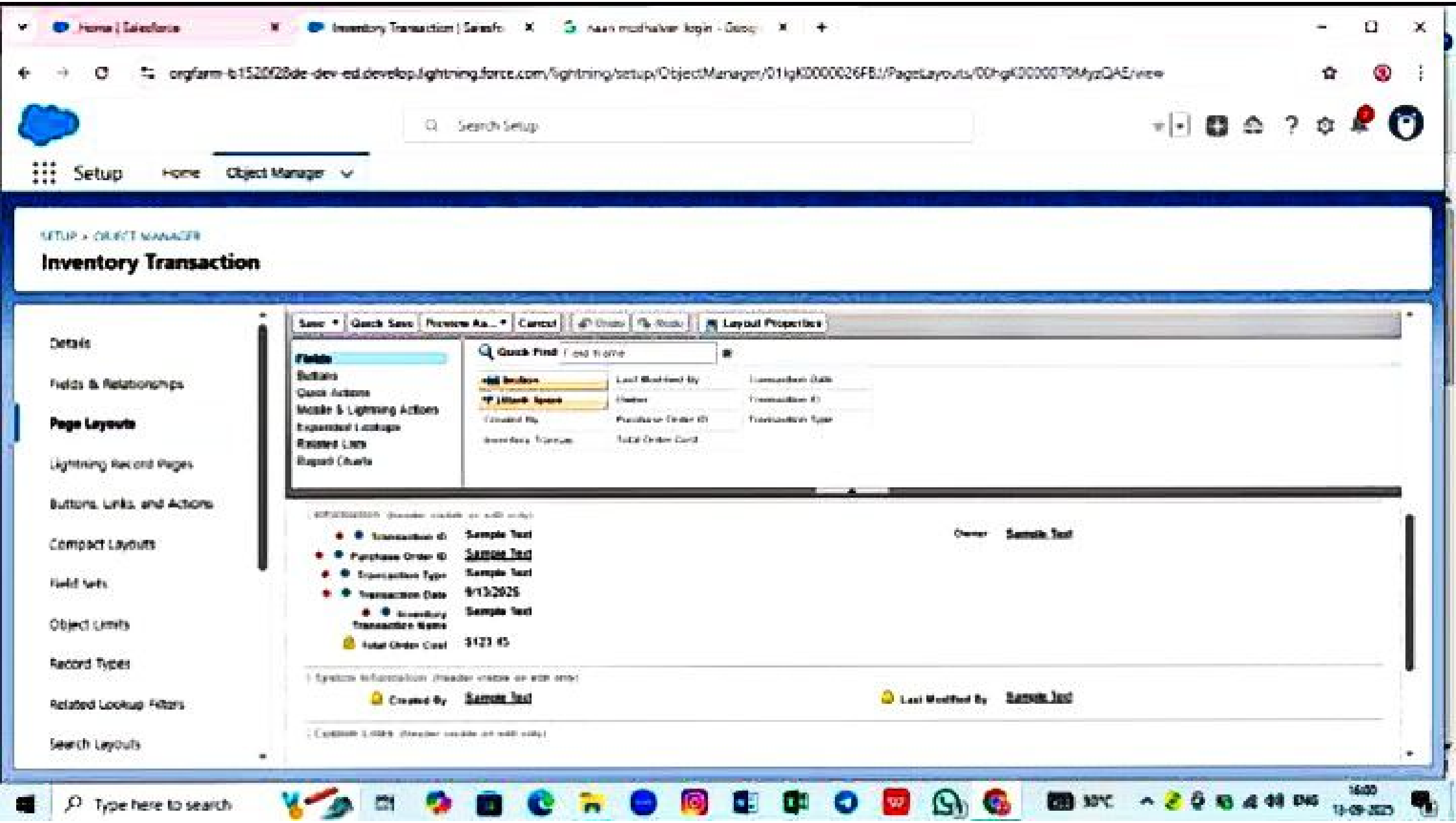
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Quick Find
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Transaction Date
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Created By
Last Modified By
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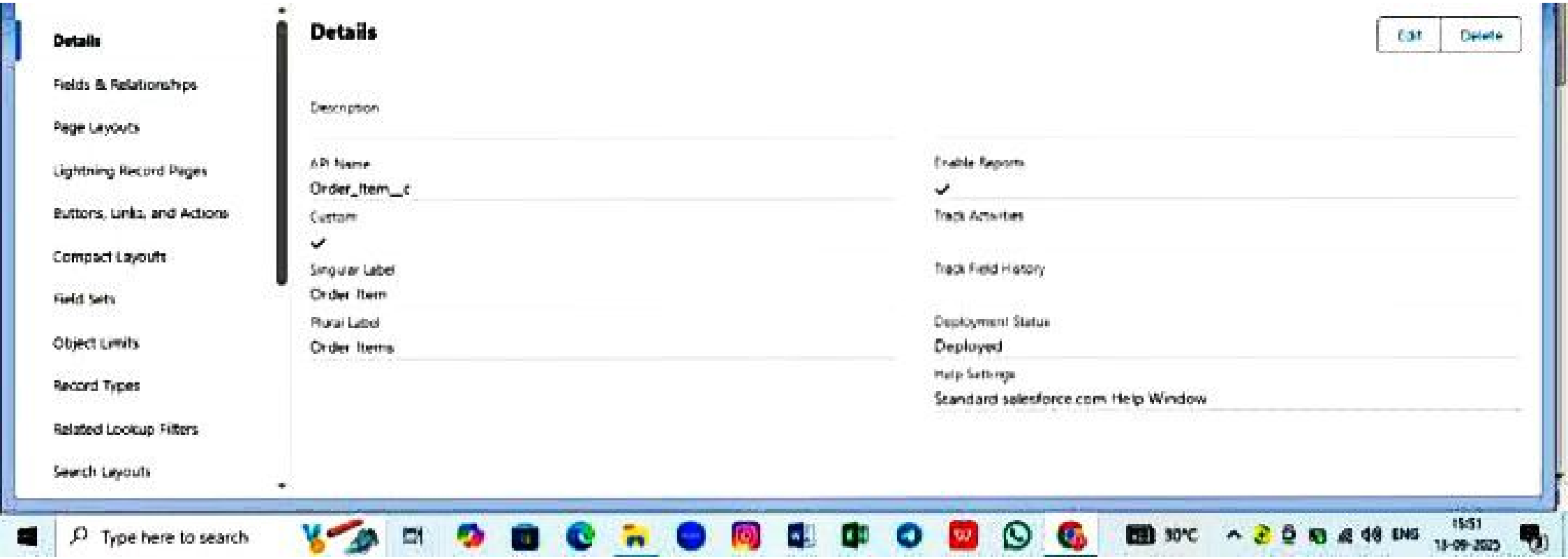
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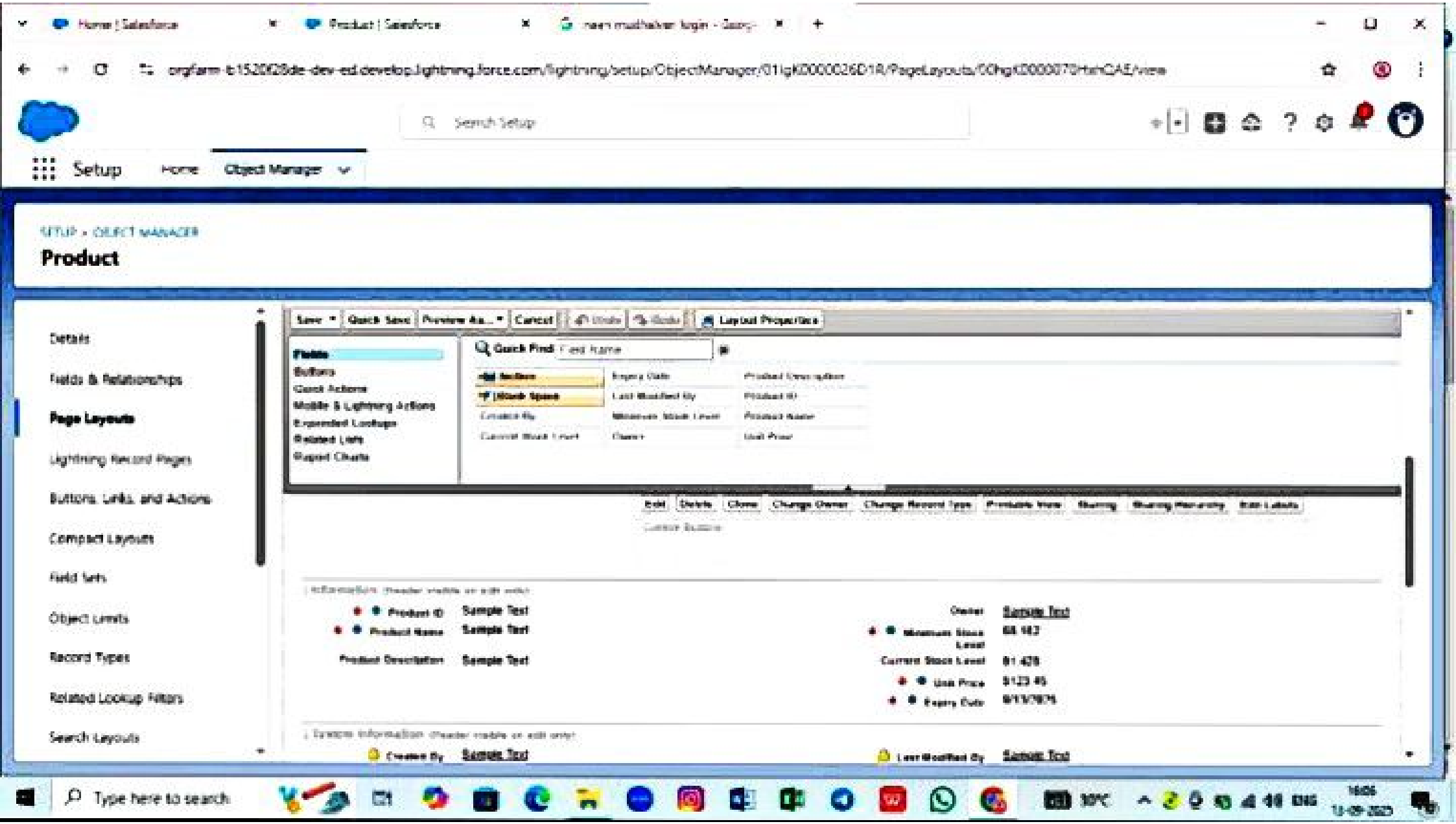
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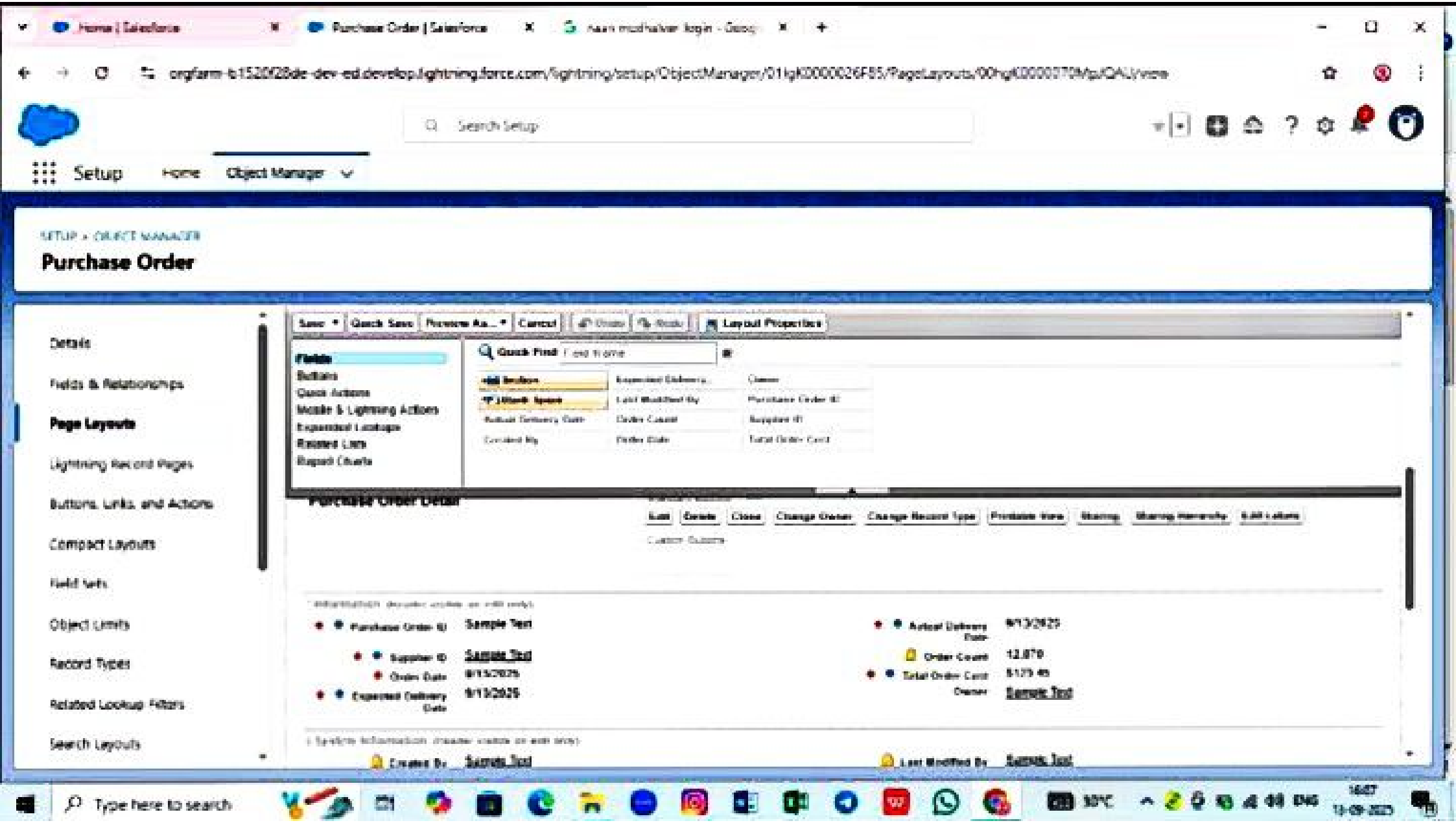
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Sharing
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Supplier ID
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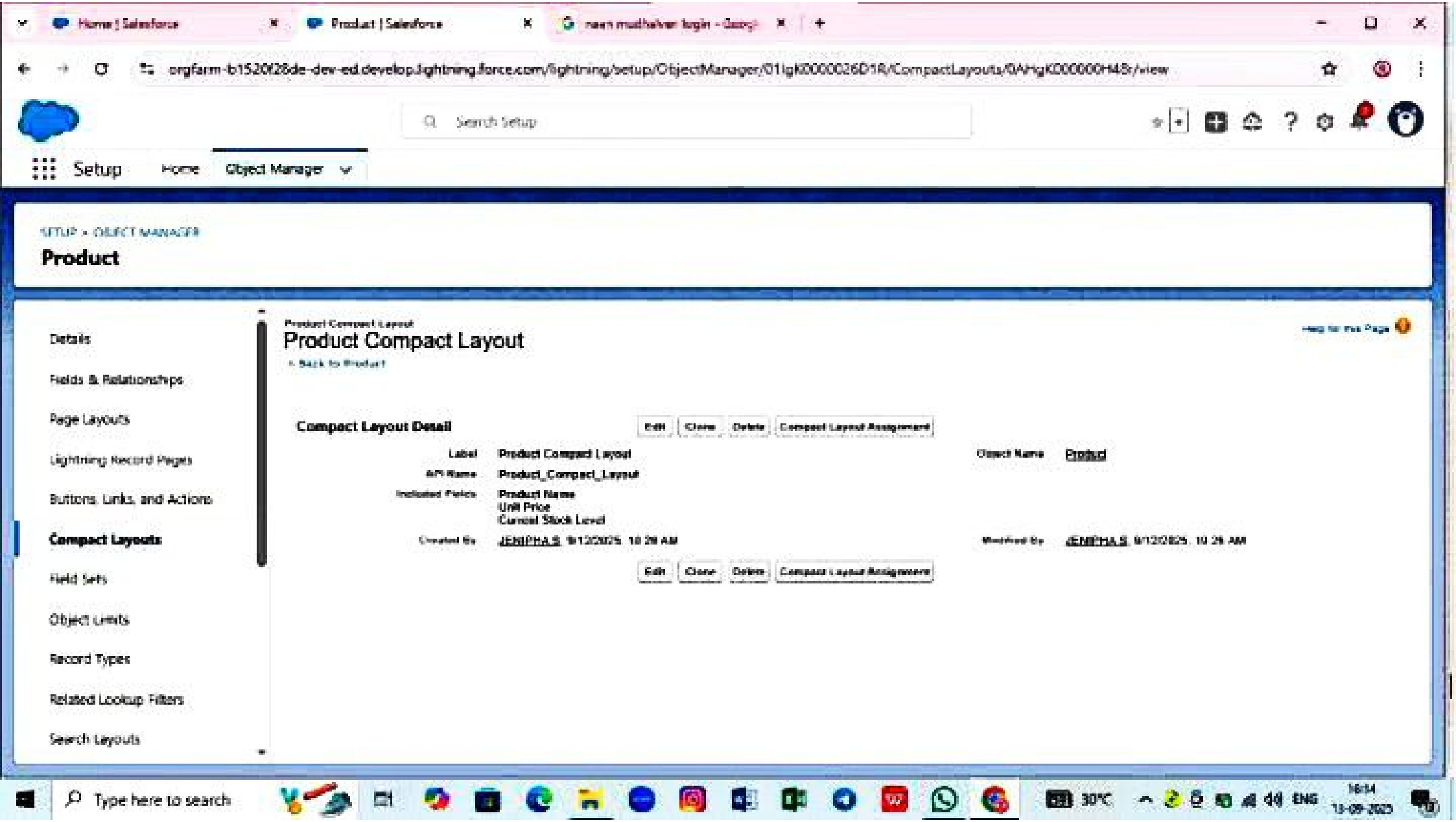
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API Name
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Included Fields
Product Name
Unit Price
Current Stock Level
Object Name
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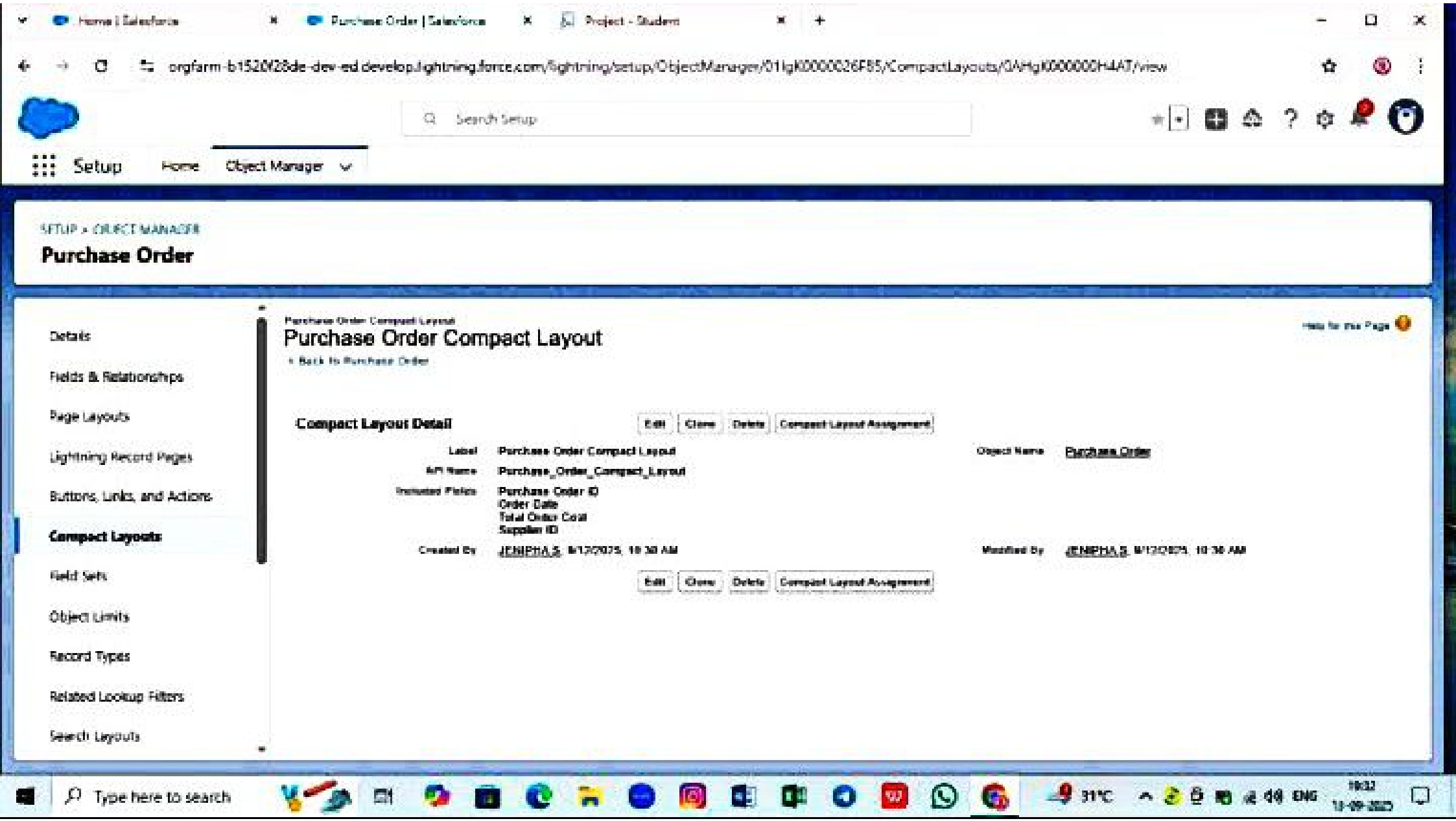
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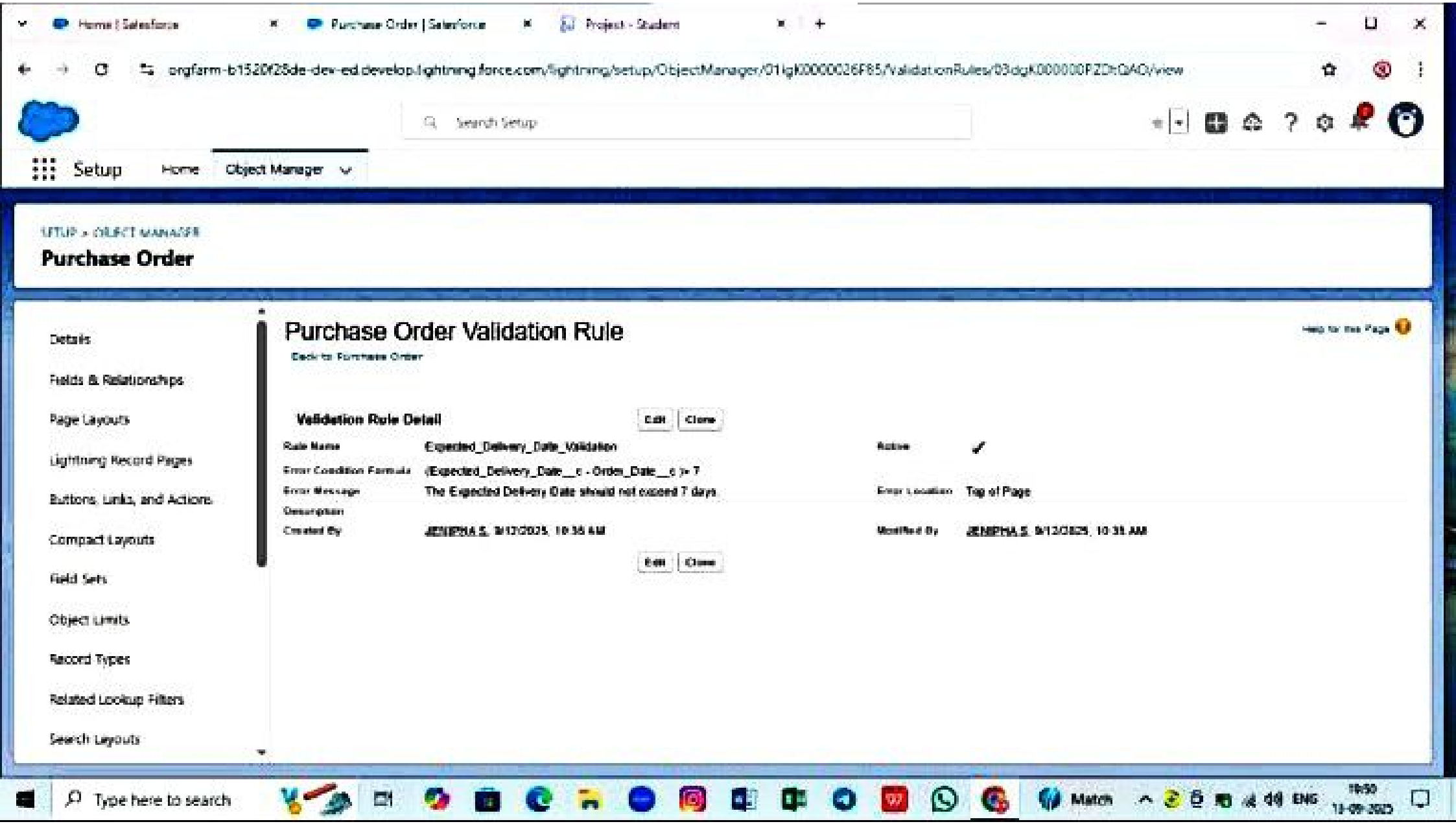
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Purchase Order Validation Rule
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Validation Rule Detail
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Rule Name
Expected_Delivery_Date_Validation
Active
Error Condition Formula
(Expected_Delivery_Date__c - Order_Date__c) > 7
Error Message
The Expected Delivery Date should not exceed 7 days
Error Location
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Description
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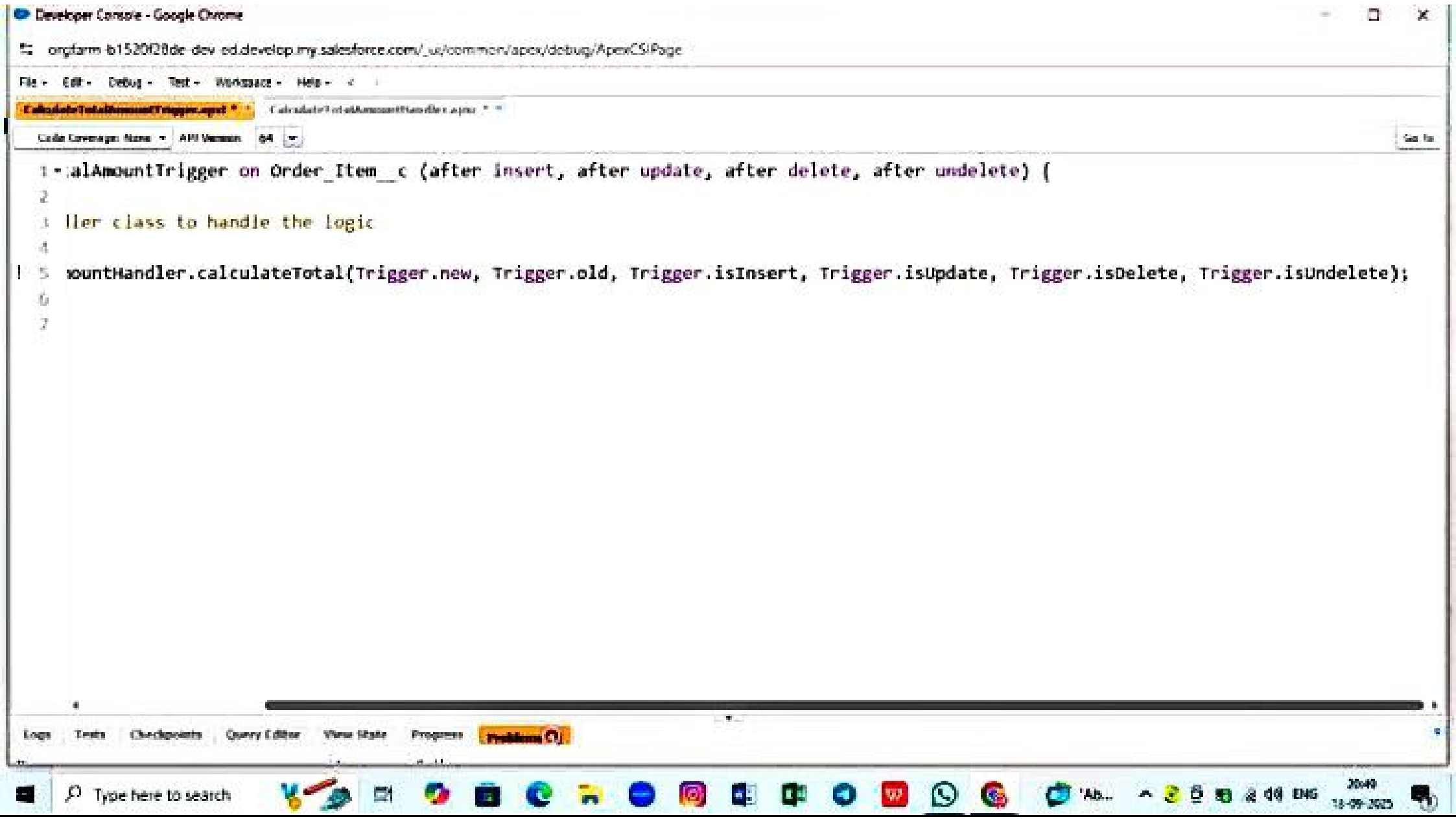
Developer Console - Google Chrome
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Code Coverage: None
API Version
64
alAmountTrigger on Order_Item__c (after insert, after update, after delete, after undelete) {
ller class to handle the logic
ountHandler.calculateTotal(Trigger.new, Trigger.old, Trigger.isInsert, Trigger.isUpdate, Trigger.isDelete, Trigger.isUndelete);
Logs
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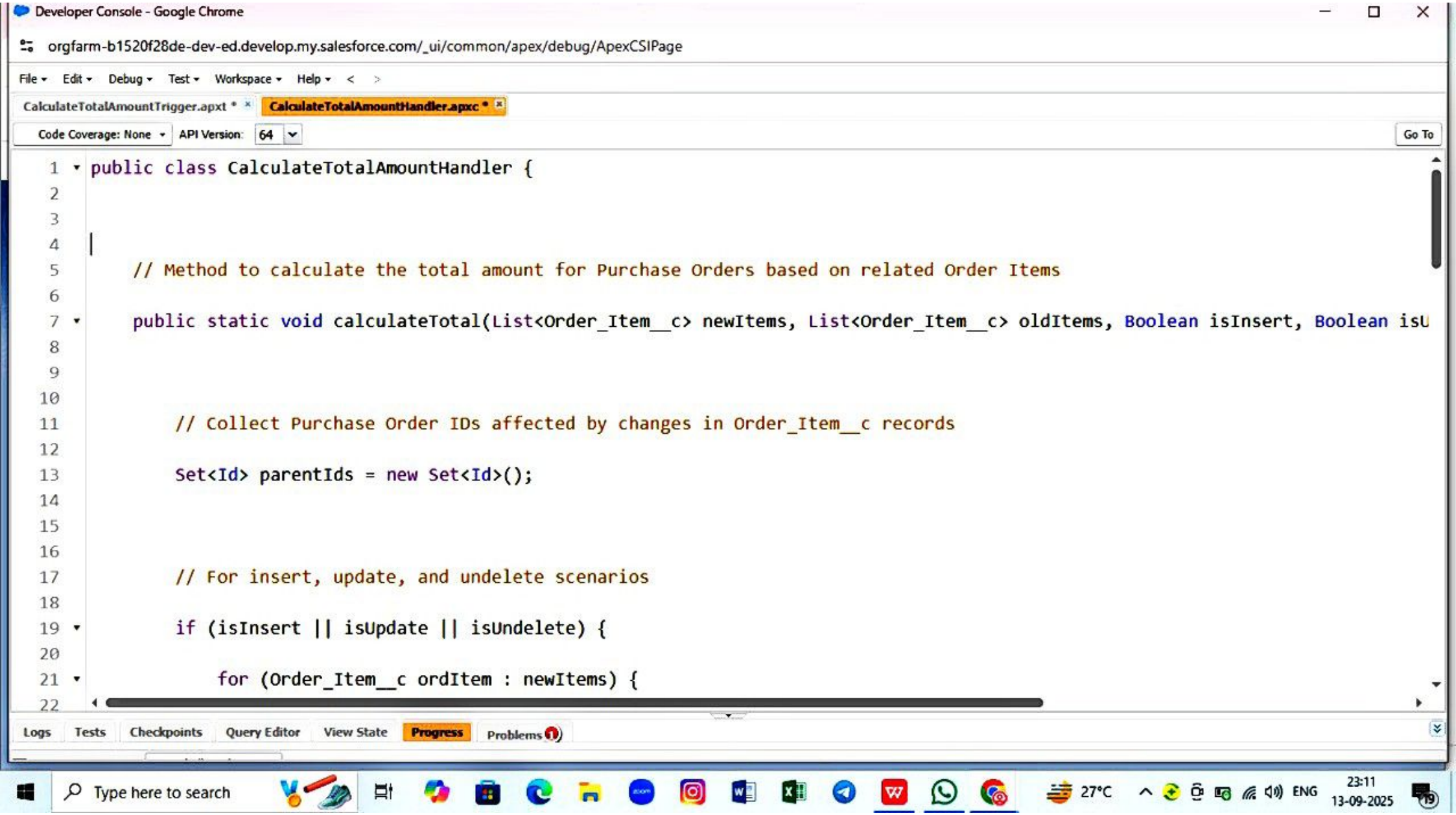
Developer Console - Google Chrome
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File Edit Debug Test Workspace Help
CalculateTotalAmountTrigger.apxt *
CalculateTotalAmountHandler.apxc *
Code Coverage: None
API Version: 64
Go To
public class CalculateTotalAmountHandler {
// Method to calculate 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 isU
// 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) {
Logs
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Checkpoints
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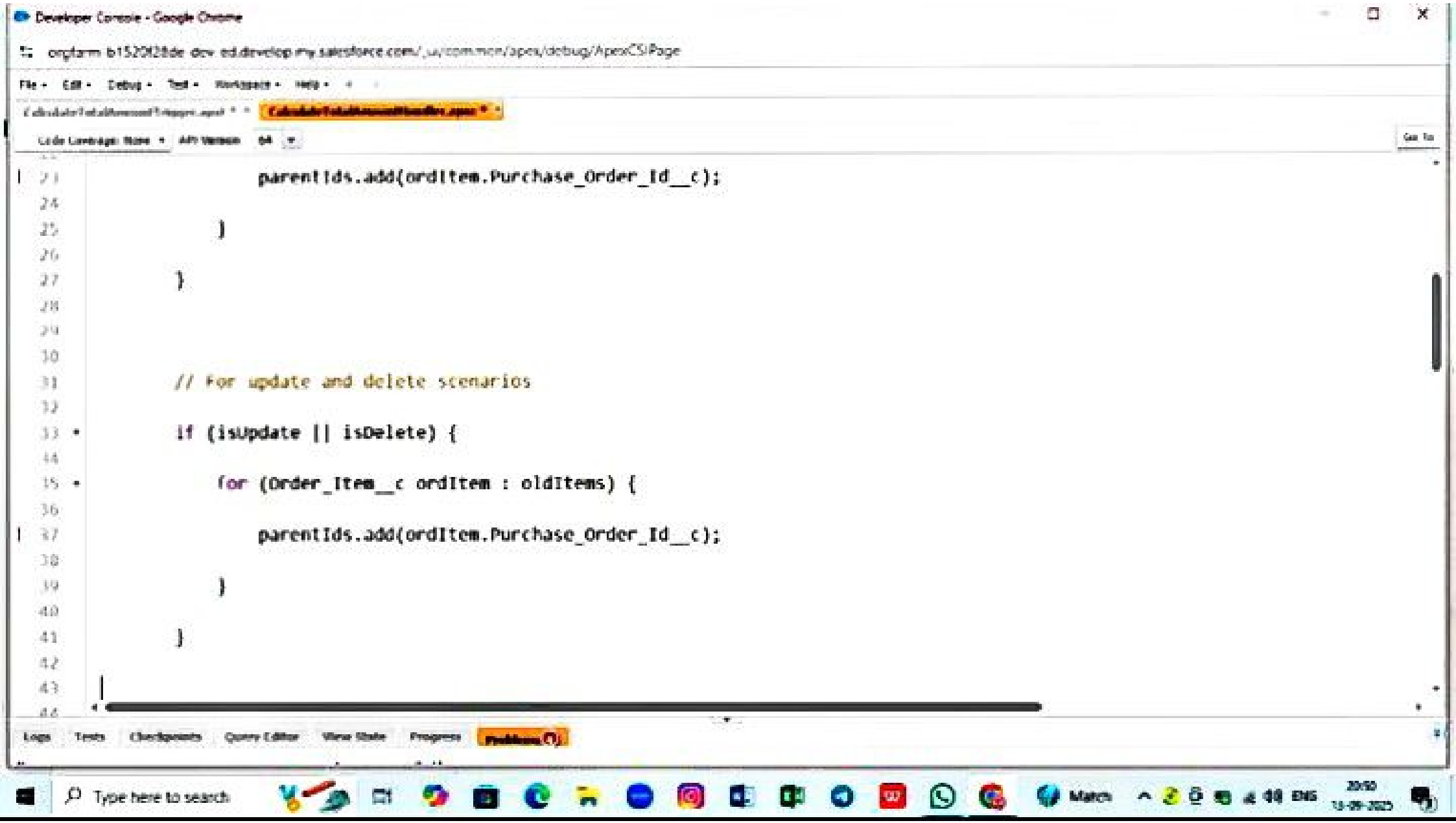
13-09-2025


Developer Console - Google Chrome
File • Edit • Debug • Test • Workspace • Help •
Code Coverage: None • API Version: 64
Go To
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);
}
}
Logs
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Query Editor
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Home | Salesforce | Roles | Salesforce | Project - Student

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Search Setup

Setup | Home | Object Manager

role

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  - Roles
- Feature Settings
  - Sales
    - Contact Roles on Contracts
    - Contact Roles on Opportunities
  - Service
    - Case Teams
      - Case Team Roles
    - Contact Roles on Cases

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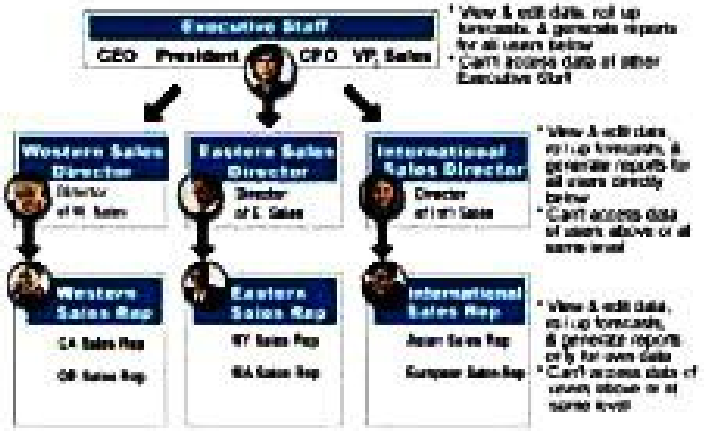
SETUP
Roles

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



Set Up Roles

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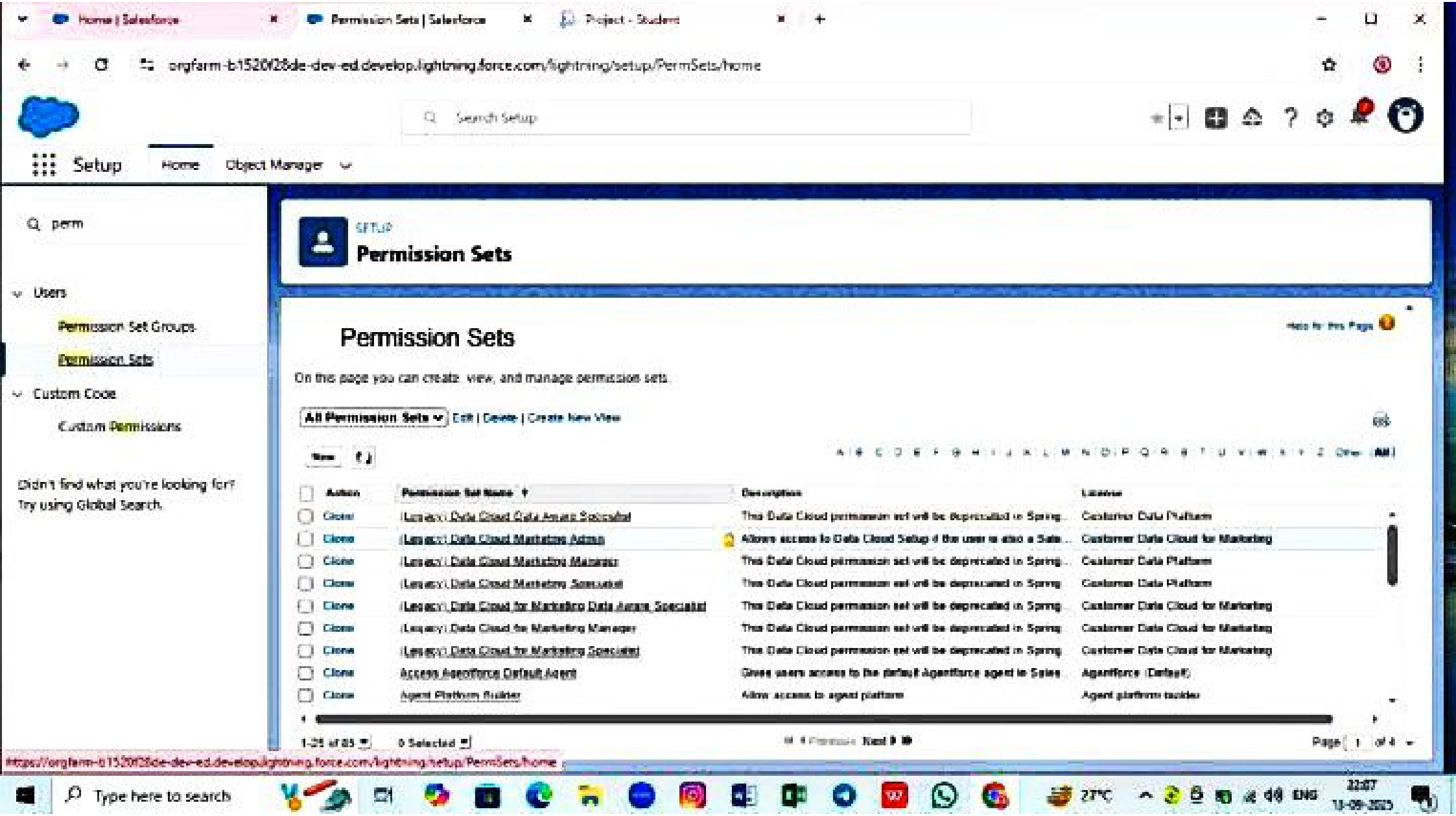
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Permission Sets | Salesforce
Project - Student
orgfarm-b1520f28de-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home
Search Setup
Setup
Home
Object Manager
perm
Users
Permission Set Groups
Permission Sets
Custom Code
Custom Permissions
Didn't find what you're looking for?
Try using Global Search.
SETUP
Permission Sets
Permission Sets
On this page you can create, view, and manage permission sets.
All Permission Sets
Edit | Delete | Create New View
New
Action
Permission Set Name
Description
License
Clone
Access Agentforce Default Agent
Gives users access to the default Agentforce agent in Sales
Agentforce (Default)
Agent Platform Builder
Allow access to agent platform
1-25 of 85
0 Selected
Page 1 of 4
https://orgfarm-b1520f28de-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home
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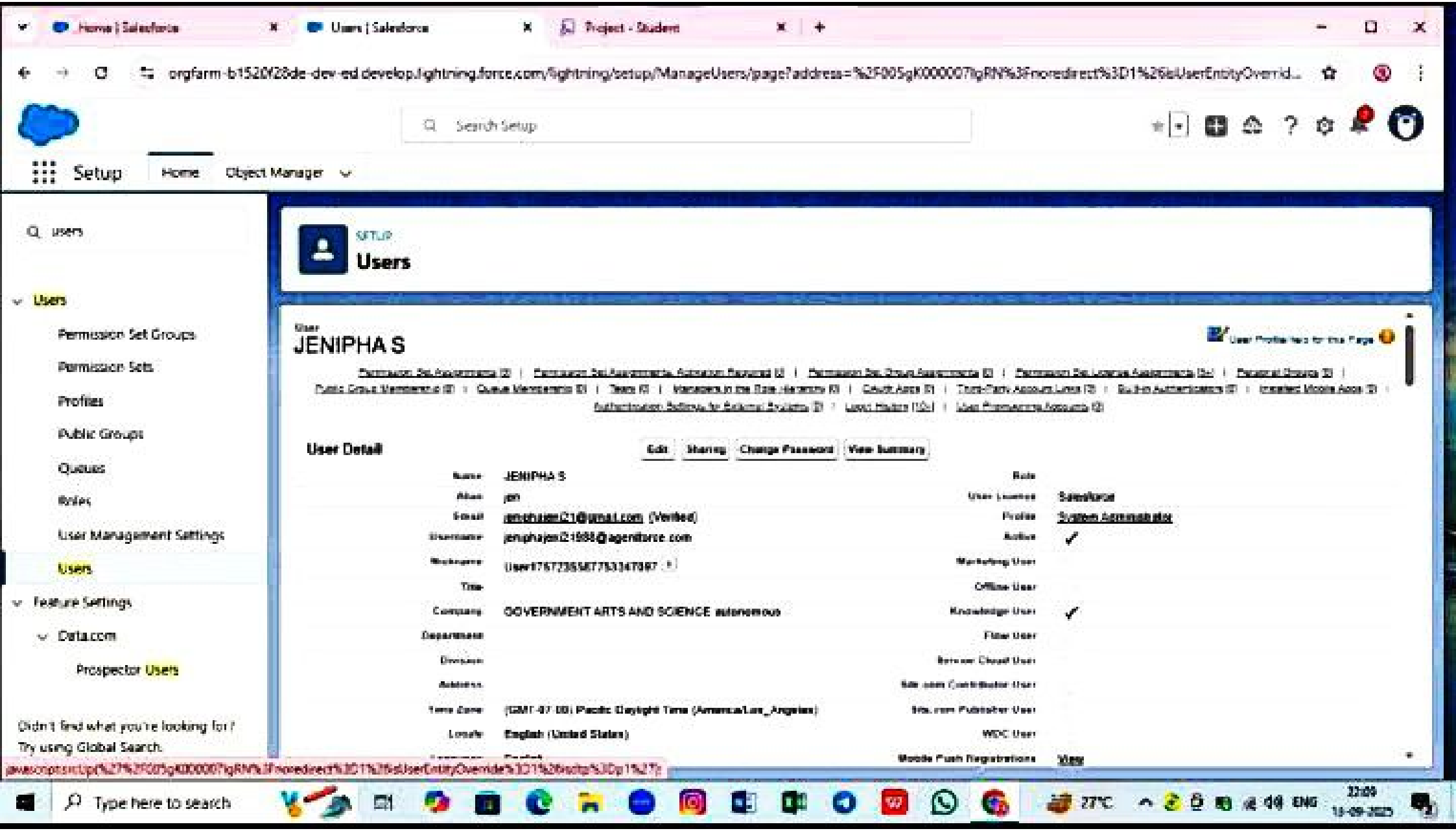
Home | Salesforce
Users | Salesforce
Project - Student
orgfarm-b1520f28de-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005gK000007tgRN%3Fnoredirect%3D1%26isUserEntityOverrid...
Search Setup
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users
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Try using Global Search.
SETUP
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jenphajen21998@agentforce.com
(User1767235E7753347387...)
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English (United States)
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System Administrator
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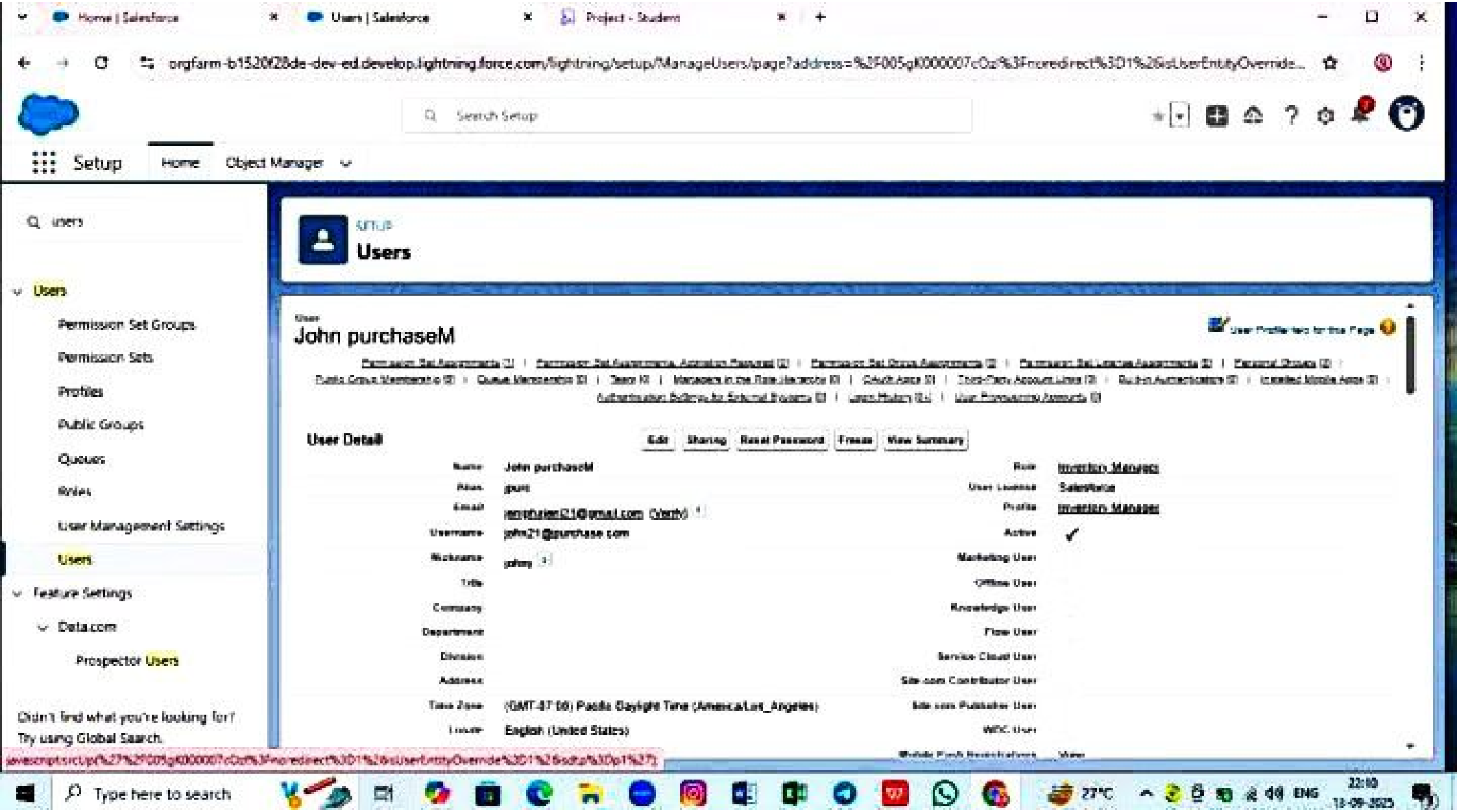
Home | Salesforce
Users | Salesforce
Project - Student
orgfarm-b1520f28de-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005gl0000007cOz%3Fnoredirect%3D1%26isUserEntityOverride...
Search Setup
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Home
Object Manager
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for?
Try using Global Search.
SETUP
Users
User
John purchaseM
User Detail
Edit
Sharing
Reset Password
Freeze
View Summary
Name
John purchaseM
Alias
jpurc
Email
Username
john21@purchase.com
Nickname
johny
Title
Company
Department
Division
Address
Time Zone
(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Locale
English (United States)
Role
Inventory Manager
User License
Salesforce
Profile
Inventory Manager
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Type here to search
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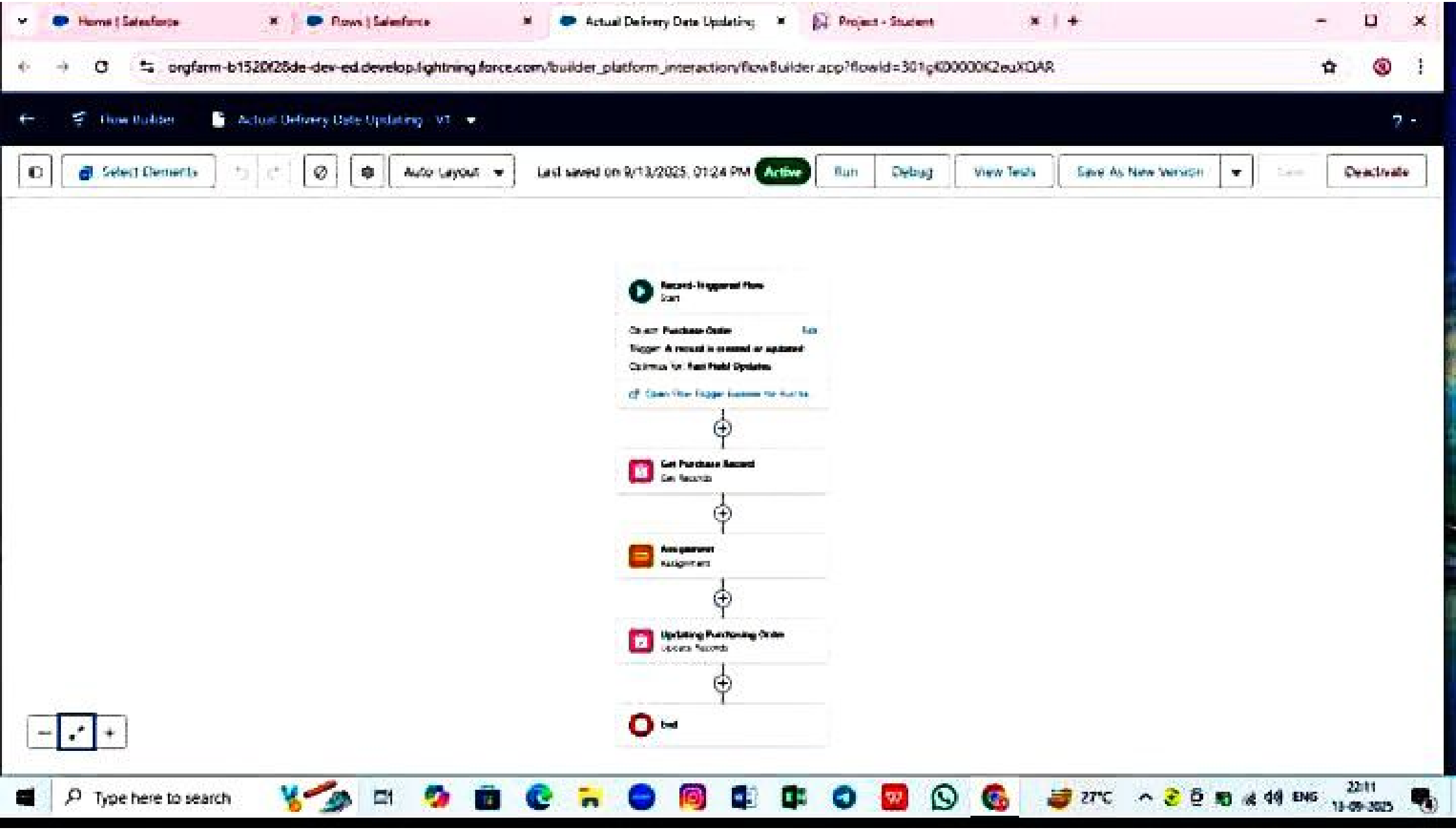
13-09-2025


Home | Salesforce
Flows | Salesforce
Actual Delivery Date Updating
Project - Student
orgfarm-b1520f26de-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301g4000000K2euXQAR
Flow Builder
Actual Delivery Date Updating V1
Select Elements
Auto-Layout
Last saved on 9/13/2025, 01:24 PM
Active
Run
Debug
View Tests
Save As New Version
Deactivate
Get Purchase Record
Assignment
End
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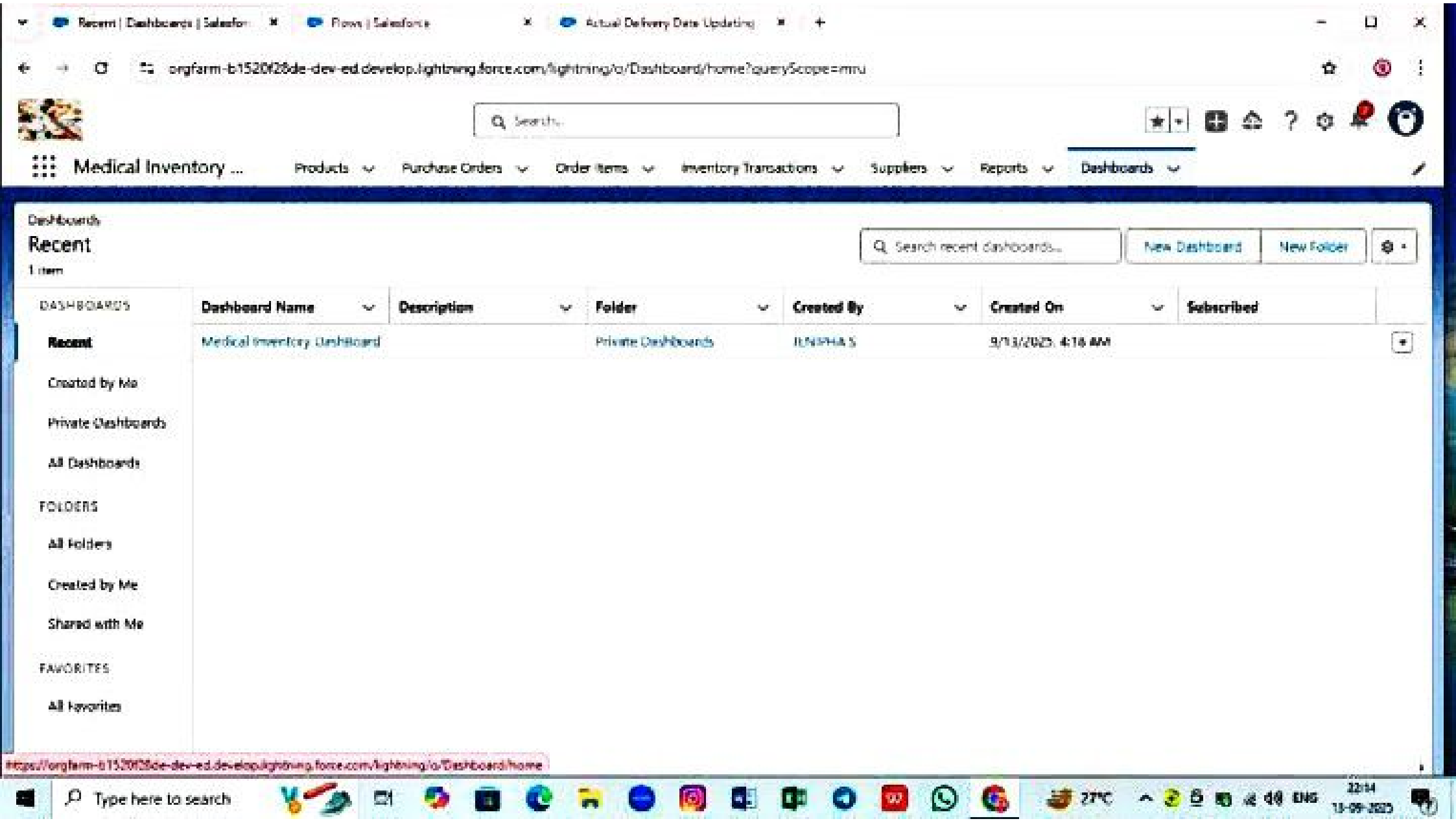
13-09-2025


Recent | Dashboards | Salesforce
Flows | Salesforce
Actual Delivery Date Updating
orgfarm-b1520f28de-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru
Search...
Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Dashboards
Recent
1 item
Search recent dashboards...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Dashboard Name
Description
Folder
Created By
Created On
Subscribed
Medical Inventory Dashboard
Private Dashboards
9/13/2025, 4:16 AM
https://orgfarm-b1520f28de-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home
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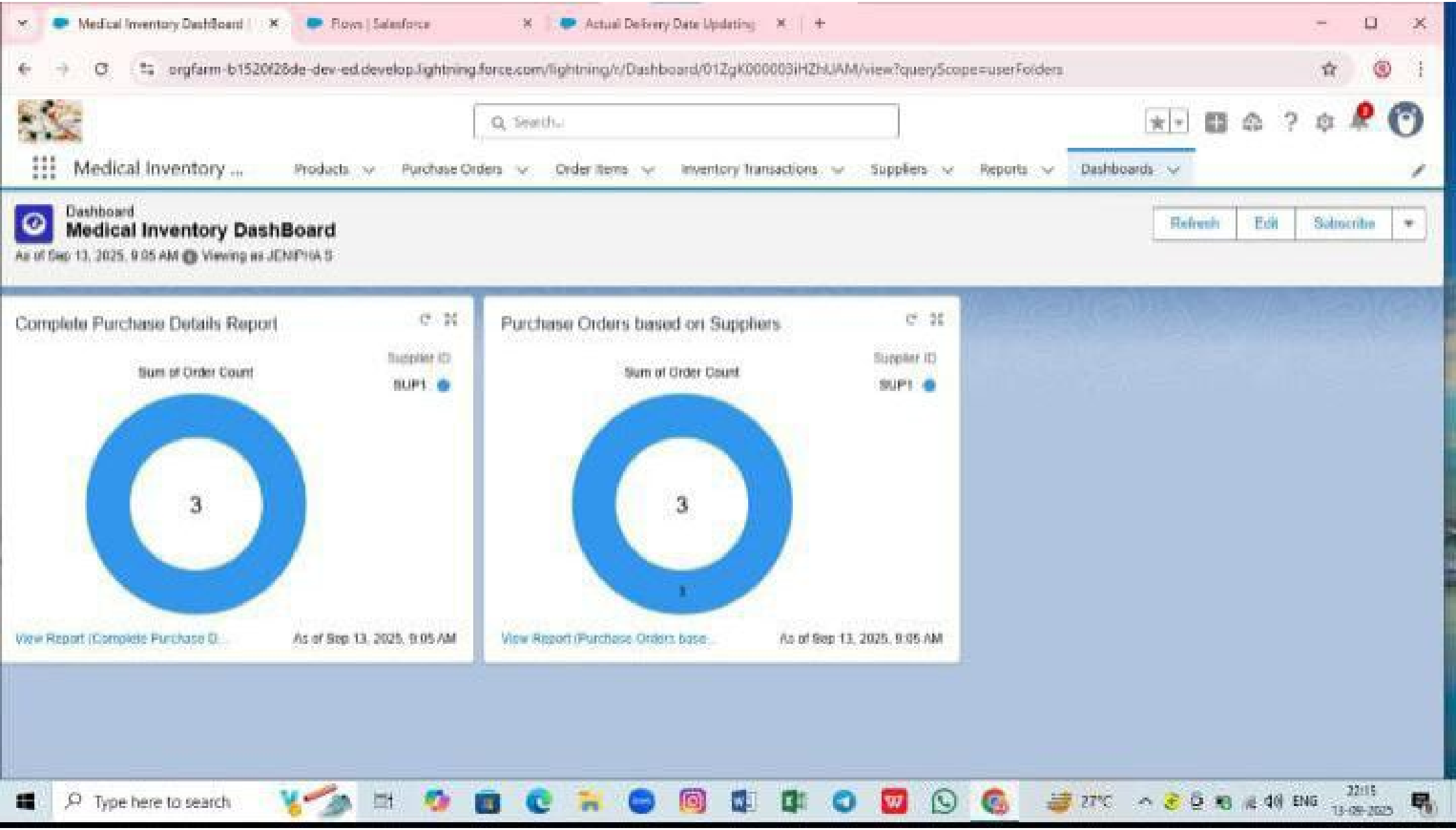
13-09-2025


Medical Inventory DashBoard
Flows | Salesforce
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orgfarm-b1520f28de-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZgK000003iHZhUAM/view?queryScope=userFolders
Search...
Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
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Dashboard
Medical Inventory DashBoard
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Refresh
Edit
Subscribe
Complete Purchase Details Report
Sum of Order Count
Supplier ID
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3
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As of Sep 13, 2025, 9:05 AM
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Sum of Order Count
Supplier ID
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As of Sep 13, 2025, 9:05 AM
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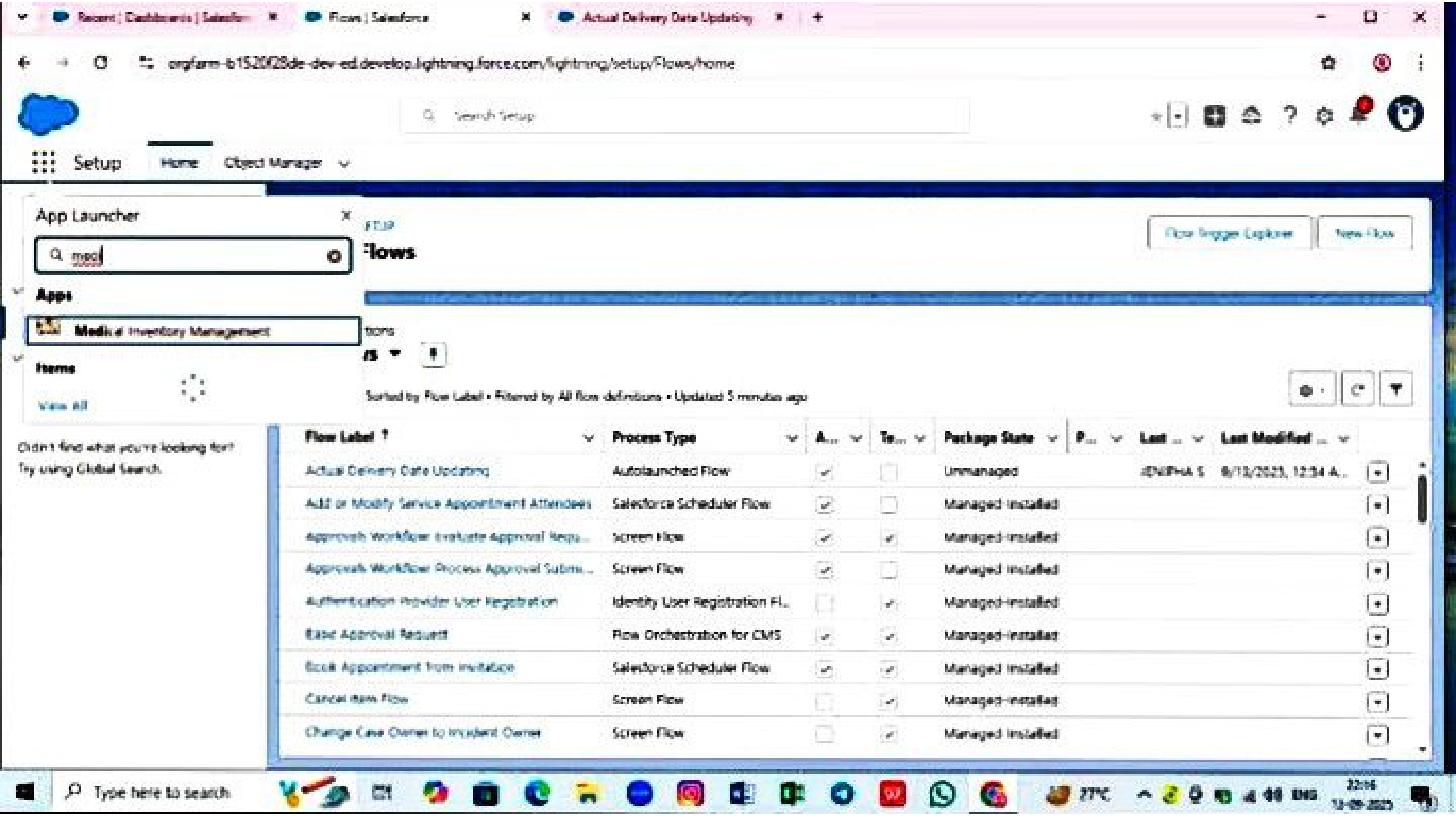
Recent | Dashboards | Salesforce
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orgfarm-b1520f28de-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home
Search Setup
Setup
Home
Object Manager
App Launcher
medi
Apps
Medical Inventory Management
Items
View All
Didn't find what you're looking for?
Try using Global Search.
Flows
Flow Trigger Explorer
New Flow
Sorted by Flow Label • Filtered by All flow definitions • Updated 5 minutes ago
Flow Label
Process Type
Package State
Last Modified
Actual Delivery Date Updating
Autolaunched Flow
Unmanaged
8/13/2023, 12:34 A...
Add or Modify Service Appointment Attendees
Salesforce Scheduler Flow
Managed-Installed
Approvals Workflow Evaluate Approval Requ...
Screen Flow
Managed-Installed
Approvals Workflow Process Approval Submi...
Screen Flow
Managed-Installed
Authentication Provider User Registration
Identity User Registration Fl...
Managed-Installed
Basic Approval Request
Flow Orchestration for CMS
Managed-Installed
Book Appointment from Invitation
Salesforce Scheduler Flow
Managed-Installed
Cancel Item Flow
Screen Flow
Managed-Installed
Change Case Owner to Incident Owner
Screen Flow
Managed-Installed
Type here to search
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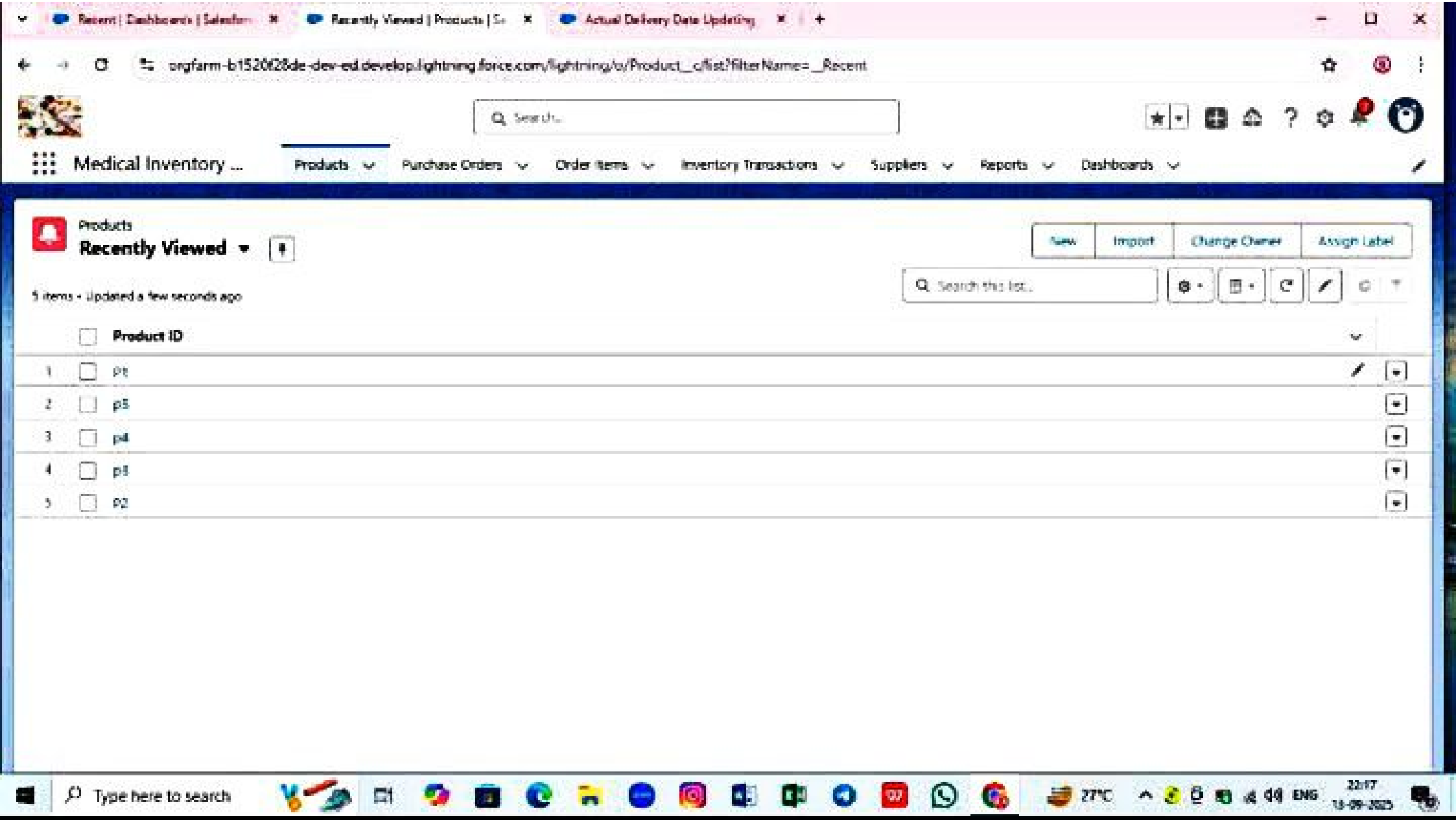
ENG


Recent | Dashboards | Salesforce
Recently Viewed | Products | Sa
Actual Delivery Date Updating
orgfarm-b1520628de-dev-ed.develop.lightning.force.com/lightning/o/Product_c/list?filterName=_Recent
Search...
Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Products
Recently Viewed
New
Import
Change Owner
Assign Label
5 items • Updated a few seconds ago
Search this list...
Product ID
1 p1
2 p5
3 p4
4 p3
5 p2
Type here to search
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13-09-2025

Recently Viewed | Products | Sa

P1 | Product | Salesforce

orgfarm-b1520f28de-dev-ed.develop.lightning.force.com/lightning/r/Product_c/a00gK00000JXXolQAH/view

Search...

Medical Inventory ...

Products | Purchase Orders | Order Items | Inventory Transactions | Suppliers | Reports | Dashboards

Product
PB-vit

Unit Price
$99.00

Current Stock Level
100

New Contact | Edit | New Opportunity

Related | **Details**

Product ID
P1

Product Name
PB-vit

Product Description

Owner
JENIPHA S

Minimum Stock Level
50

Current Stock Level
100

Unit Price
$99.00

Expiry Date
9/30/2025

Created By
JENIPHA S, 9/13/2025, 7:31 AM

Last Modified By
JENIPHA S, 9/13/2025, 7:31 AM

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Type here to search

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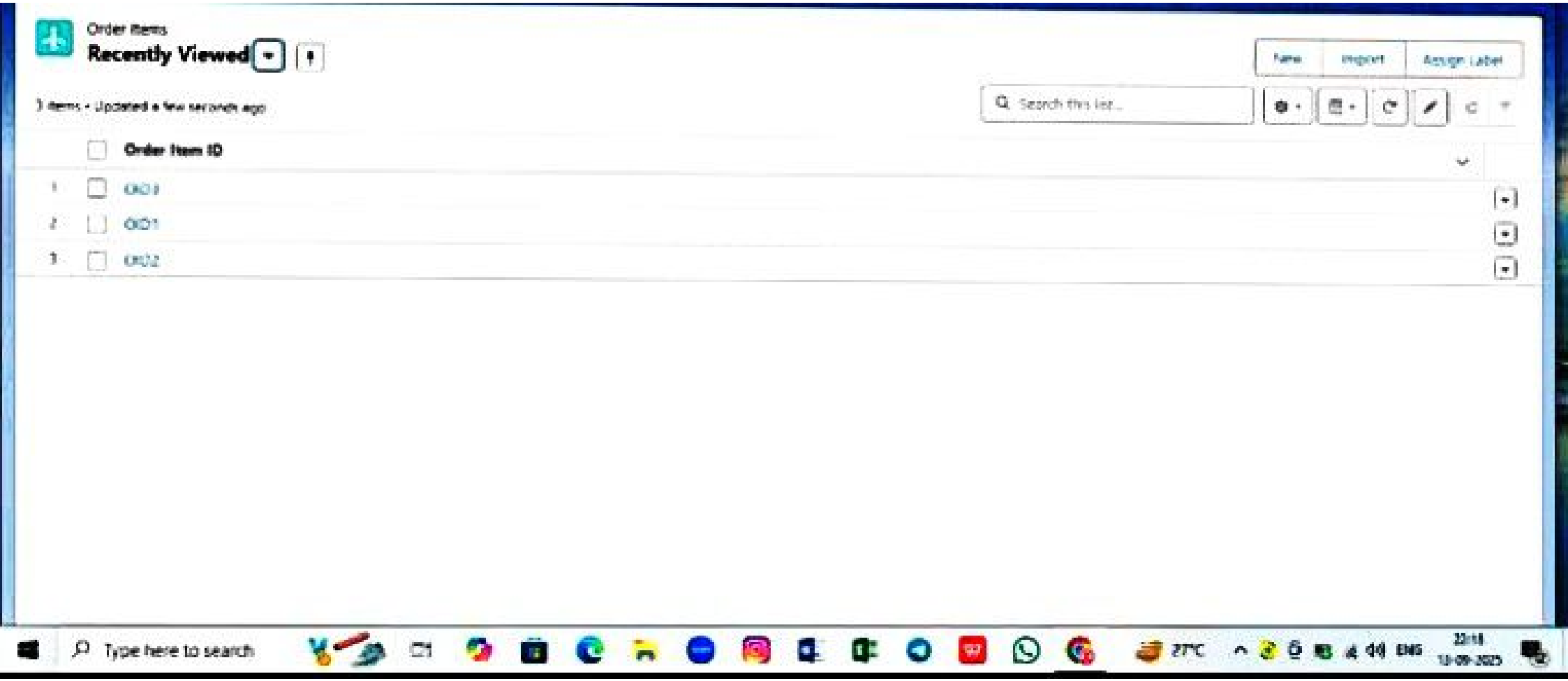
ENG

23:19
13-09-2025


Order Items
Recently Viewed
New
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3 items • Updated a few seconds ago
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Order Item ID
1
OI3
2
OI1
3
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Type here to search
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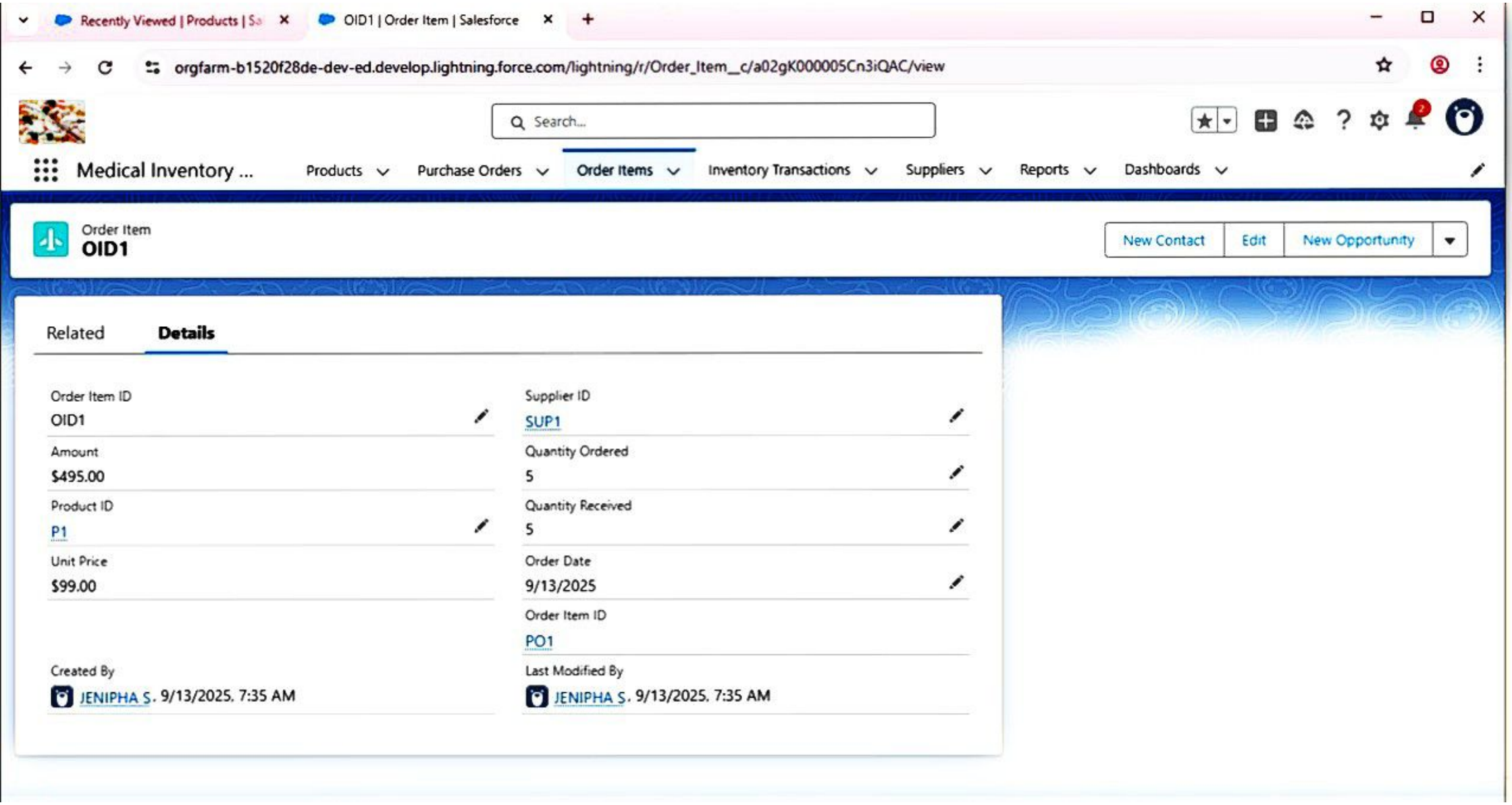
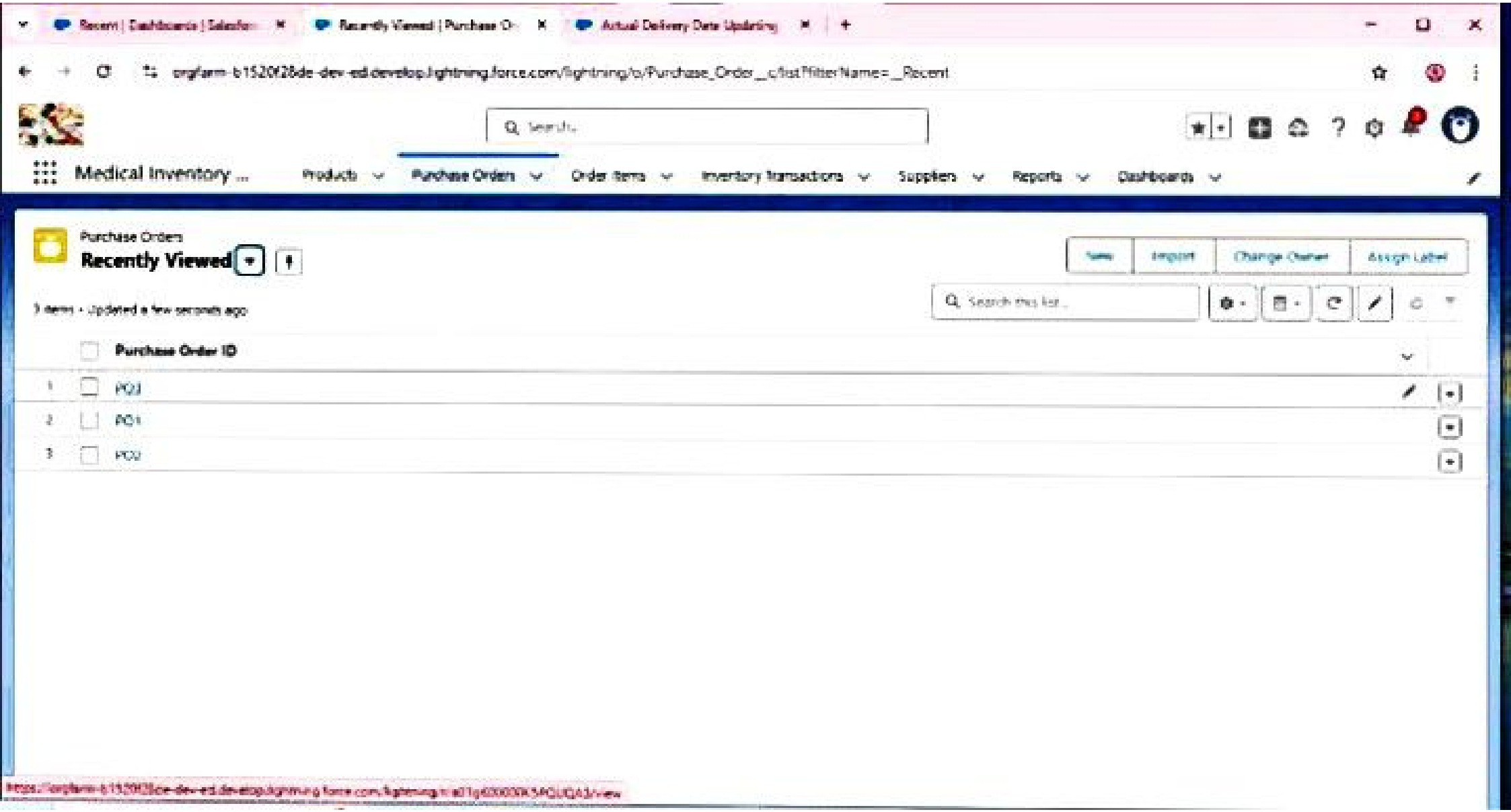
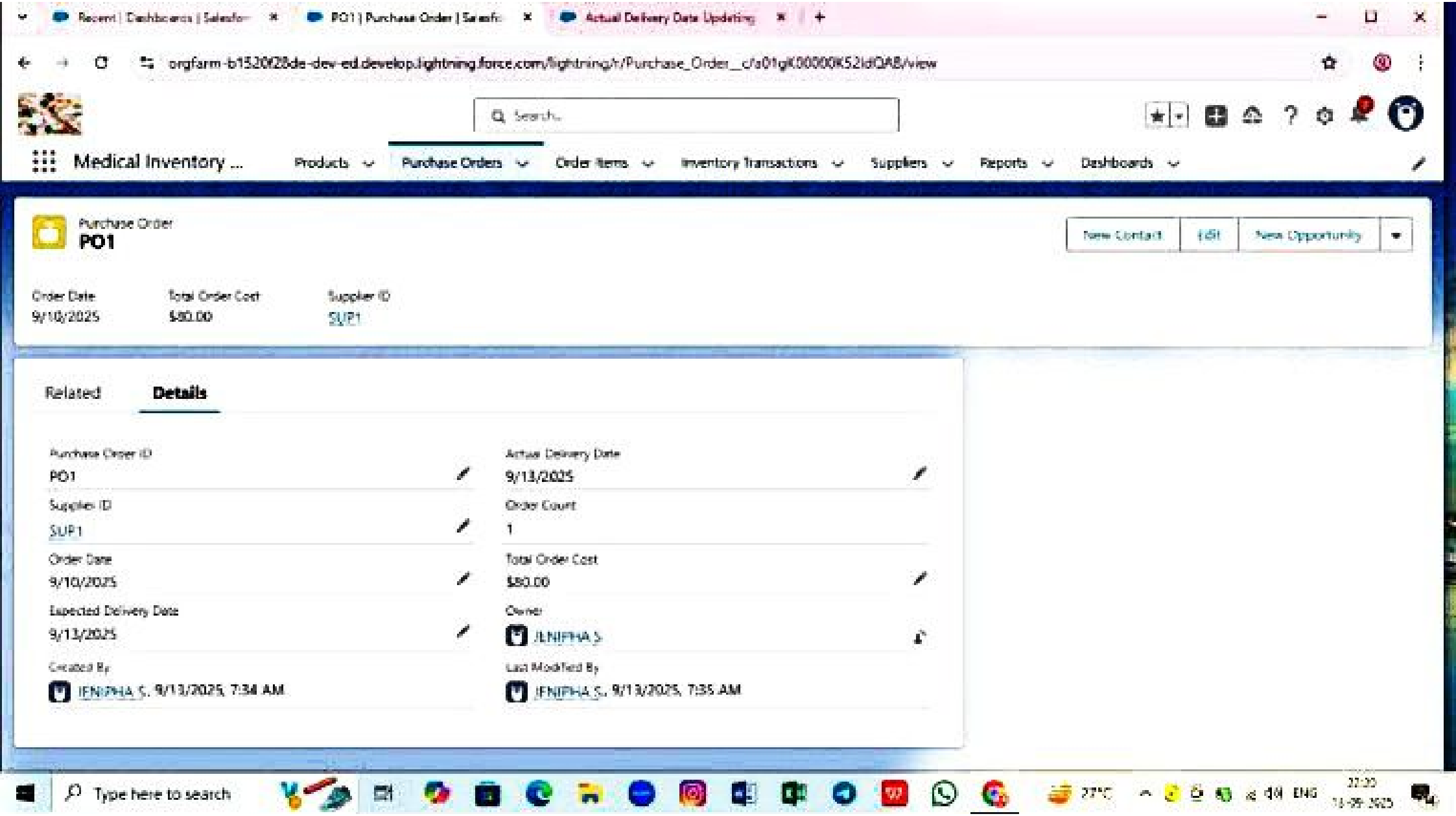

Recently Viewed | Products | Sa
OID1 | Order Item | Salesforce
orgfarm-b1520f28de-dev-ed.develop.lightning.force.com/lightning/r/Order_Item__c/a02gK000005Cn3iQAC/view
Search...
Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Order Item
OID1
New Contact
Edit
New Opportunity
Related
Details
Order Item ID
OID1
Supplier ID
SUP1
Amount
$495.00
Quantity Ordered
5
Product ID
P1
Quantity Received
5
Unit Price
$99.00
Order Date
9/13/2025
Order Item ID
PO1
Created By
JENIPHA S, 9/13/2025, 7:35 AM
Last Modified By
JENIPHA S, 9/13/2025, 7:35 AM


Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Purchase Orders
Recently Viewed
Purchase Order ID
PO3
PO1
PO2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PO1 | Purchase Order | Salesfo
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orgfarm-b1520f28de-dev-ed.develop.lightning.force.com/lightning/r/Purchase_Order__c/a01gK00000K52IdQAB/view
Search...
Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Purchase Order
PO1
New Contact
Edit
New Opportunity
Order Date
9/10/2025
Total Order Cost
$80.00
Supplier ID
SUP1
Related
Details
Purchase Order ID
PO1
Actual Delivery Date
9/13/2025
Supplier ID
SUP1
Order Count
1
Order Date
9/10/2025
Total Order Cost
$80.00
Expected Delivery Date
9/13/2025
Owner
JENIFHA S
Created By
JENIFHA S, 9/13/2025, 7:34 AM
Last Modified By
JENIFHA S, 9/13/2025, 7:35 AM
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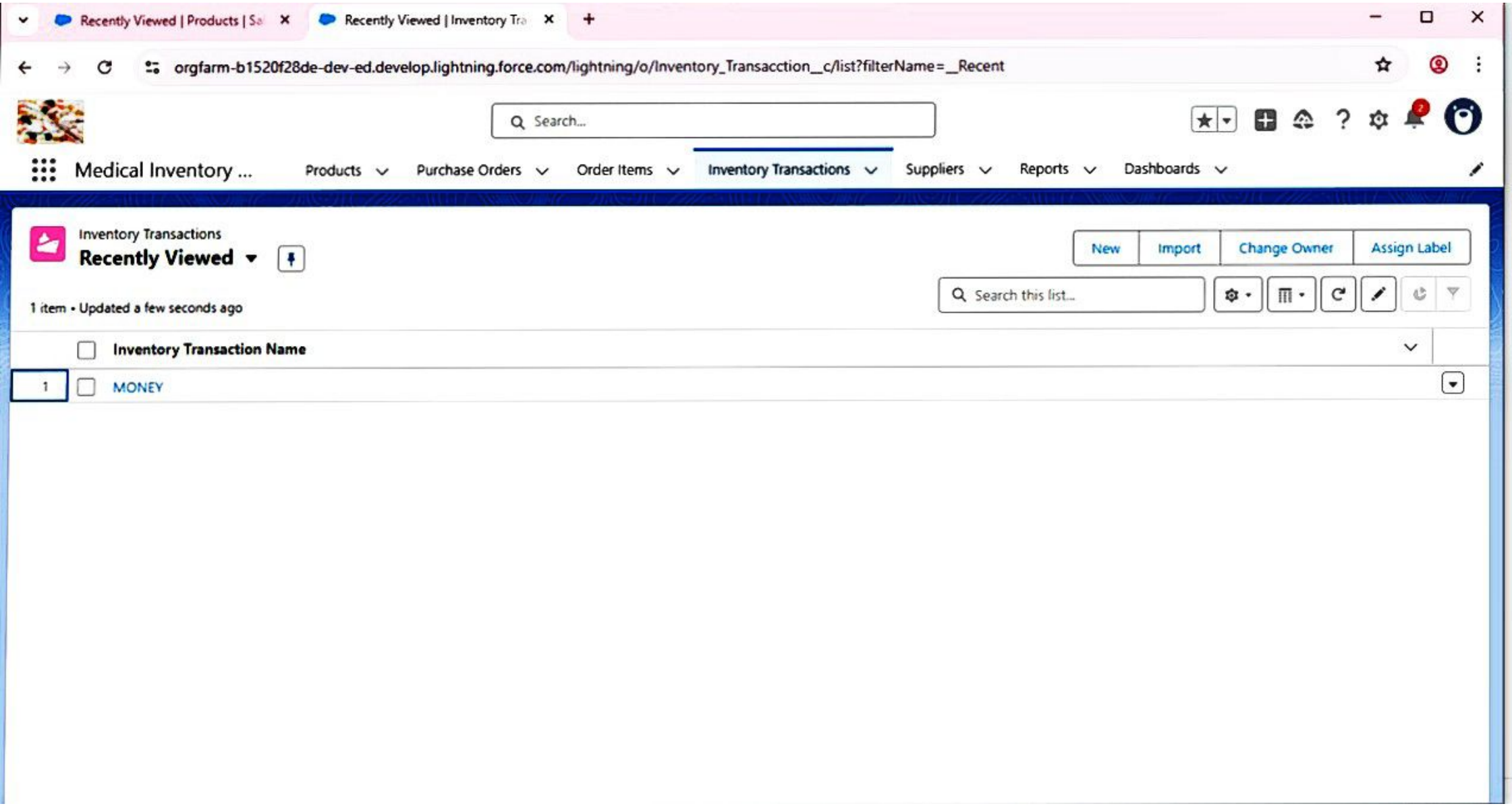
Recently Viewed | Products | Sa
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orgfarm-b1520f28de-dev-ed.develop.lightning.force.com/lightning/o/Inventory_Transacction__c/list?filterName=__Recent
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Medical Inventory ...
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Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
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Import
Change Owner
Assign Label
Search this list...
Inventory Transaction Name
1
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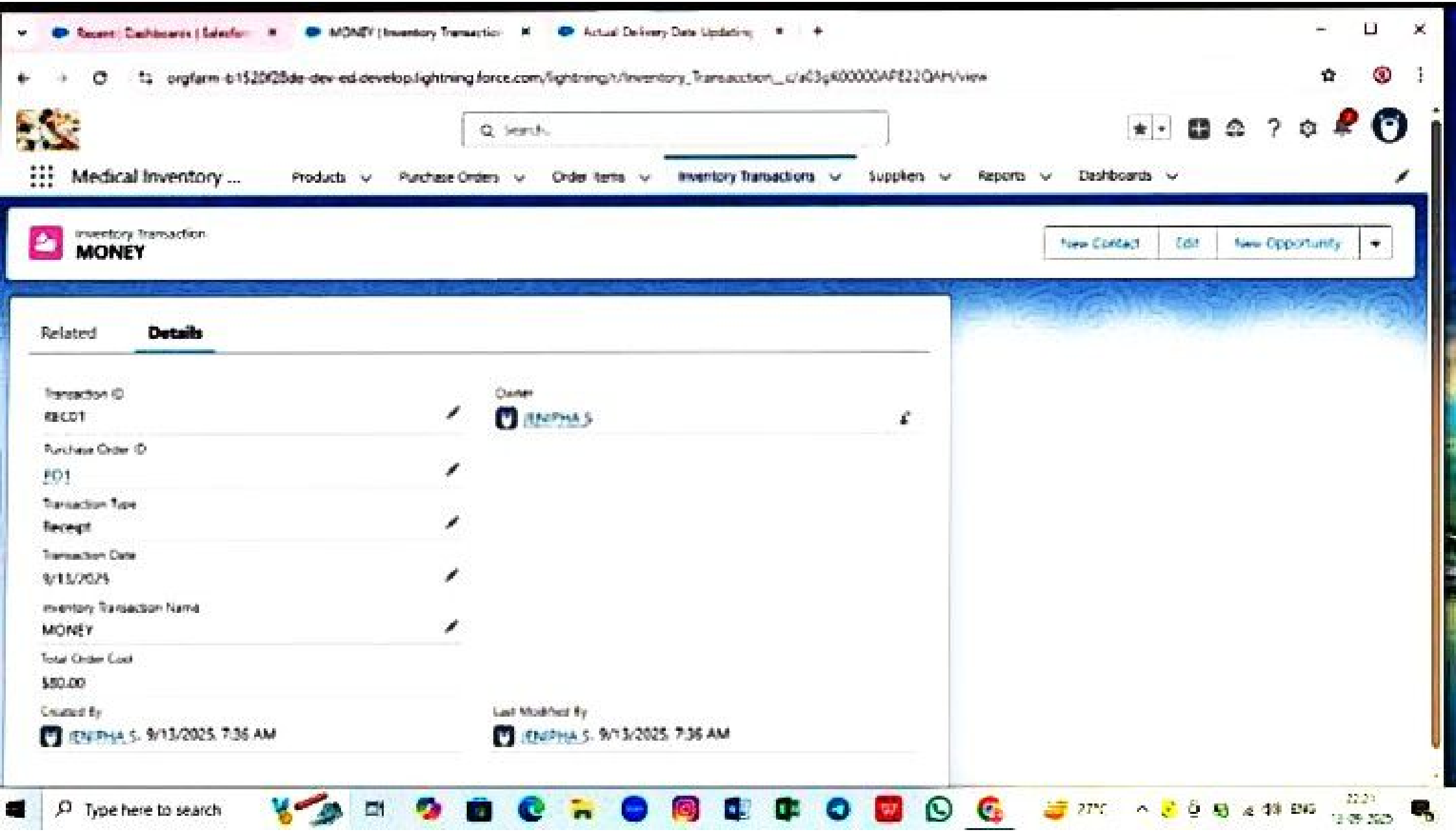
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Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Inventory Transaction
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New Contact
Edit
New Opportunity
Related
Details
Transaction ID
RECO1
Owner
Purchase Order ID
PO1
Transaction Type
Receipt
Transaction Date
9/13/2025
Inventory Transaction Name
MONEY
Total Order Cost
$80.00
Created By
9/13/2025, 7:36 AM
Last Modified By
9/13/2025, 7:36 AM
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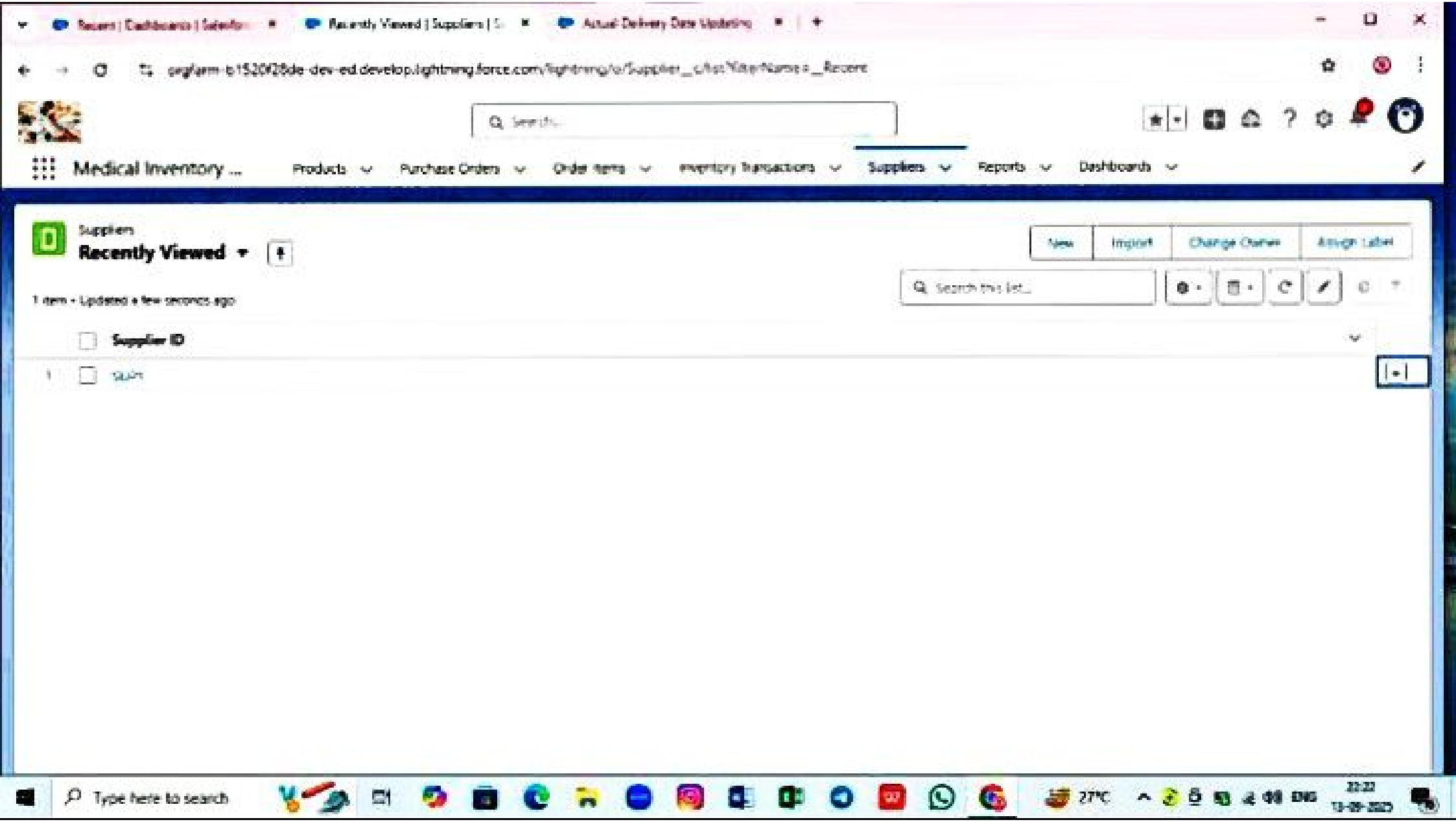
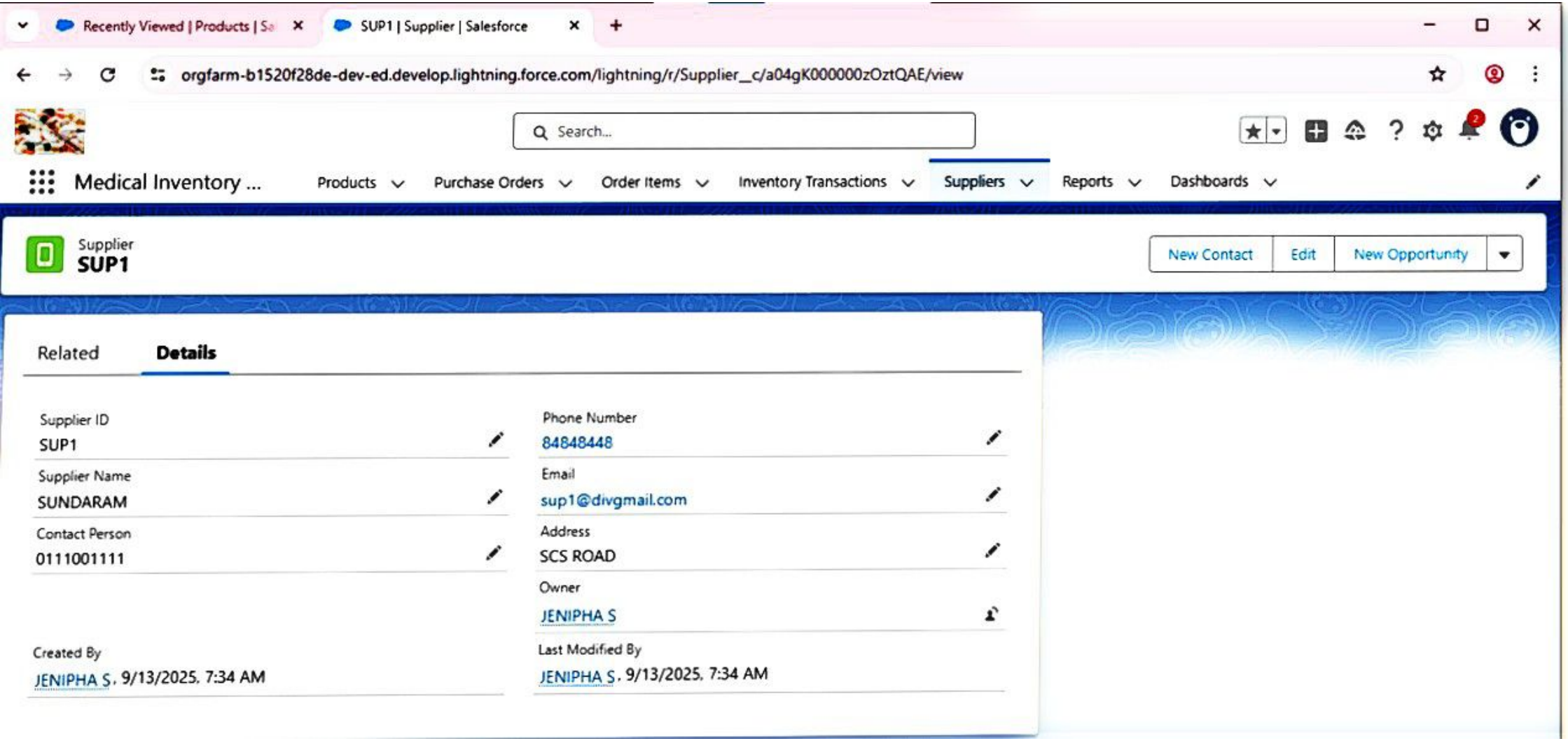
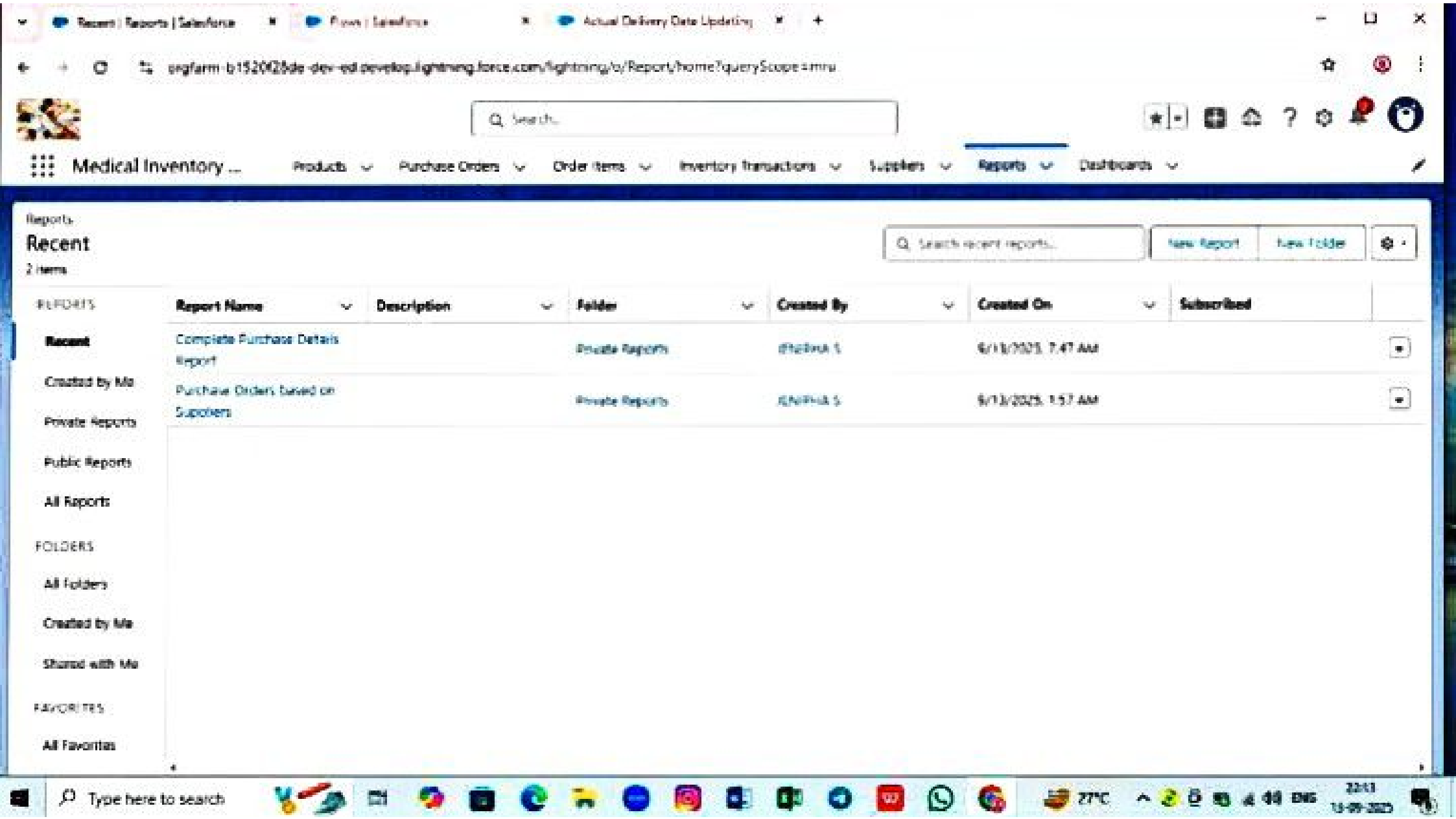

Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Suppliers
Recently Viewed
New
Import
Change Owner
Assign Label
1 item • Updated a few seconds ago
Supplier ID
Type here to search


Recently Viewed | Products | Sa
SUP1 | Supplier | Salesforce
orgfarm-b1520f28de-dev-ed.develop.lightning.force.com/lightning/r/Supplier__c/a04gK000000zOztQAE/view
Search...
Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Supplier
SUP1
New Contact
Edit
New Opportunity
Related
Details
Supplier ID
SUP1
Supplier Name
SUNDARAM
Contact Person
0111001111
Phone Number
84848448
Email
sup1@divgmail.com
Address
SCS ROAD
Owner
JENIPHA S
Created By
JENIPHA S, 9/13/2025, 7:34 AM
Last Modified By
JENIPHA S, 9/13/2025, 7:34 AM


Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Reports
Recent
2 items
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Report Name
Description
Folder
Created By
Created On
Subscribed
Complete Purchase Details Report
Private Reports
6/13/2025 7:47 AM
Purchase Orders based on Suppliers
Private Reports
6/13/2025 1:57 AM
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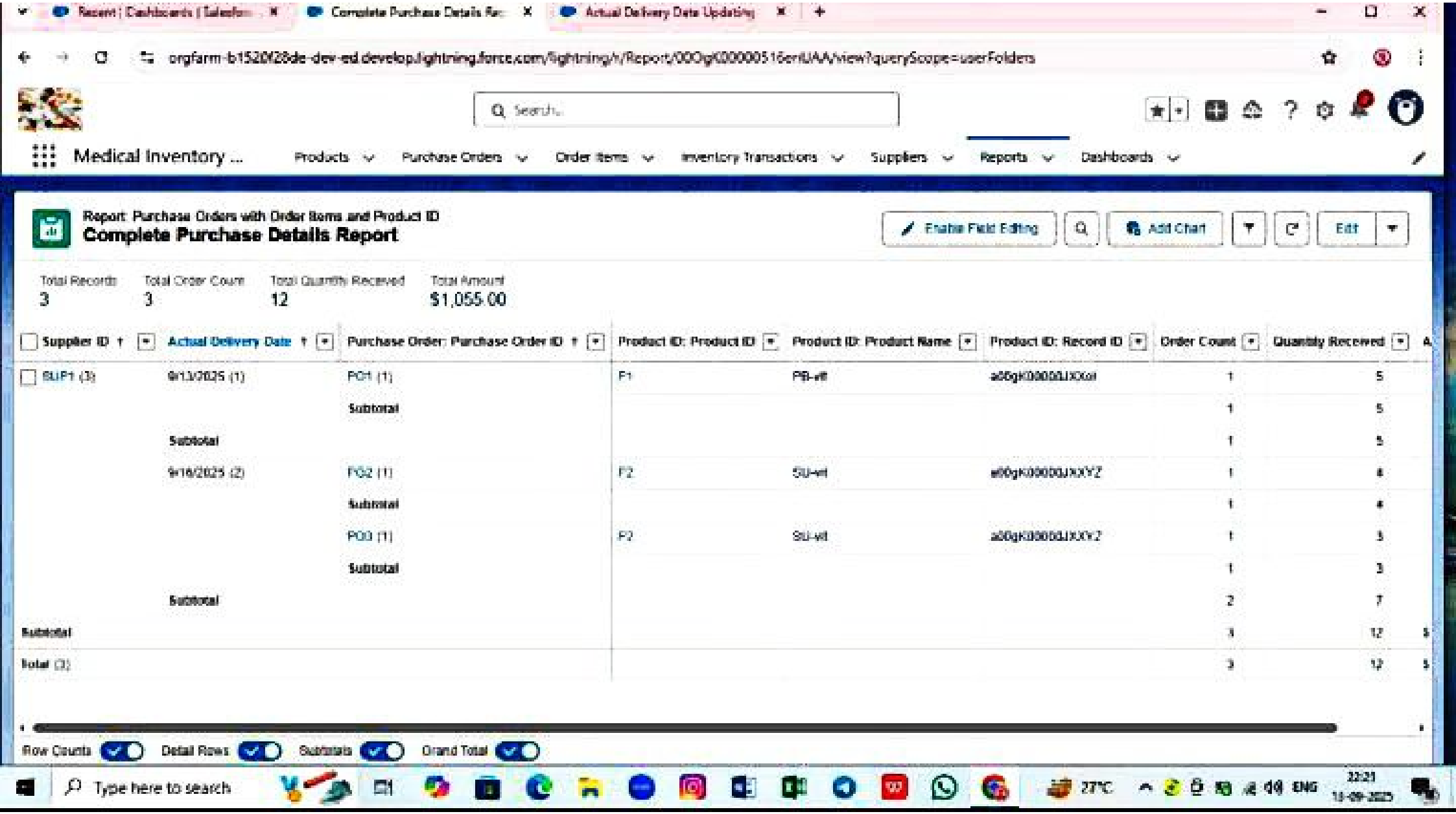
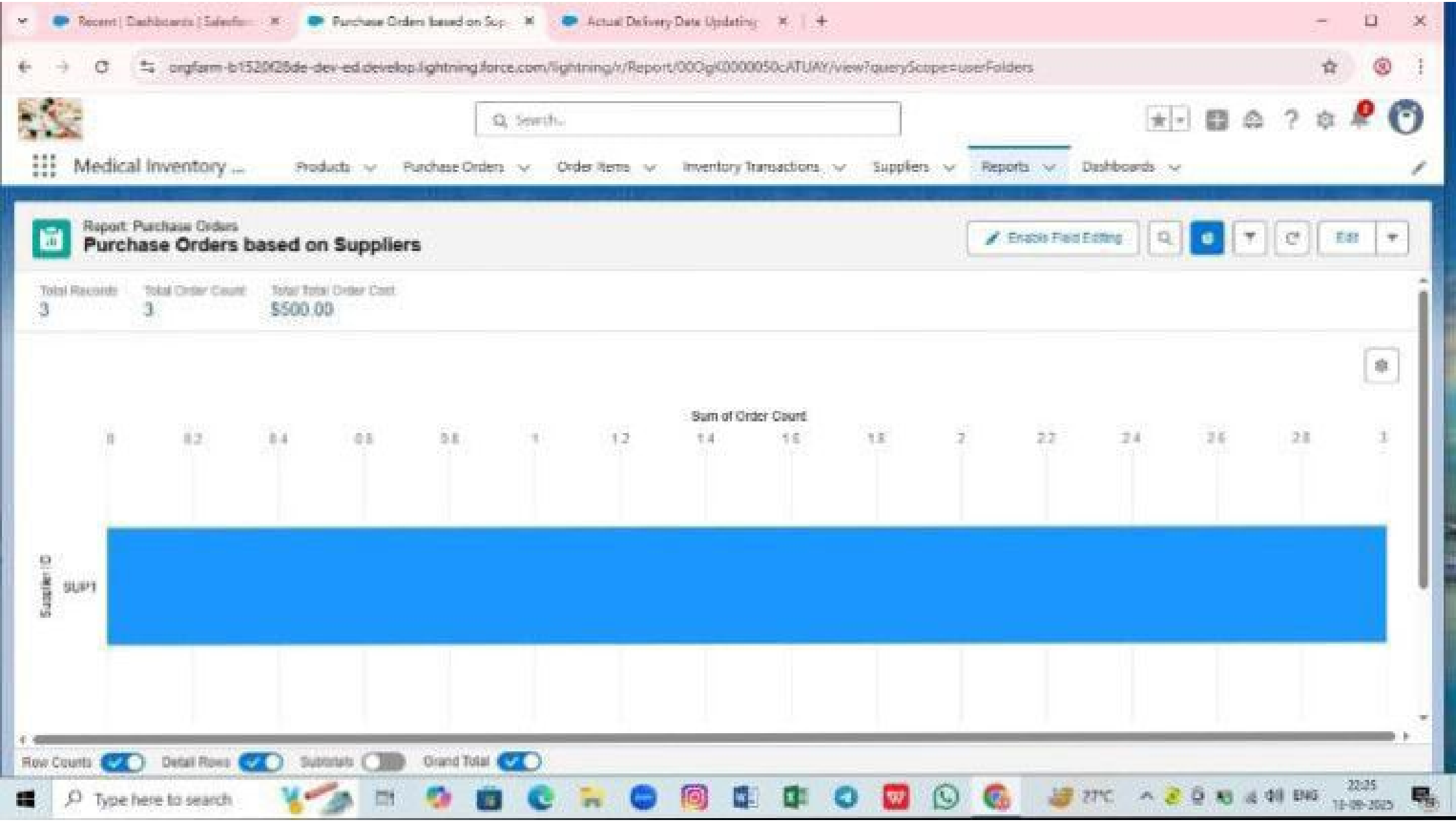
27°C


Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Report: Purchase Orders with Order Items and Product ID
Complete Purchase Details Report
Enable Field Editing
Add Chart
Edit
Total Records 3
Total Order Count 3
Total Quantity Received 12
Total Amount $1,055.00
Supplier ID
Actual Delivery Date
Purchase Order: Purchase Order ID
Product ID: Product ID
Product ID: Product Name
Product ID: Record ID
Order Count
Quantity Received
SUP1 (3)
9/13/2025 (1)
PO1 (1)
P1
PB-vit
1
5
Subtotal
1
5
Subtotal
1
5
9/16/2025 (2)
PO2 (1)
P2
SU-vit
1
4
Subtotal
1
4
PO3 (1)
P2
SU-vit
1
3
Subtotal
1
3
Subtotal
2
7
Subtotal
3
12
Total (3)
3
12
Row Counts
Detail Rows
Subtotals
Grand Total
Type here to search
27°C
ENG


Medical Inventory ...
Products
Purchase Orders
Order Items
Inventory Transactions
Suppliers
Reports
Dashboards
Report: Purchase Orders
Purchase Orders based on Suppliers
Enable Field Editing
Edit
Total Records
3
Total Order Count
3
Total Total Order Cost
$500.00
Sum of Order Count
0
0.2
0.4
0.6
0.8
1
1.2
1.4
1.6
1.8
2
2.2
2.4
2.6
2.8
3
Supplier ID
SUP1
Row Counts
Detail Rows
Subtotals
Grand Total
Type here to search

ADVANTAGES & DISADVANTAGES

Advantages:

Centralized Tracking – Real-time visibility of medicines, stock levels, and expiry dates.

Automation – Auto-alerts for low stock, reorders, and expiry reminders.

Integration – Easily connects with purchase orders, suppliers, and billing systems.

Accuracy – Reduces manual errors in stock management.

Scalability – Can be customized and scaled as hospital/pharmacy grows.

Reports & Analytics – Easy to generate insights for decision-making.

Cloud-based – Accessible from anywhere with secure data storage.

Disadvantages:

Costly Setup – Licensing, customization, and training can be expensive.

Complexity – Requires technical knowledge to configure properly.

Dependency on Internet – Cloud-based system won't work offline.

Customization Time – Tailoring Salesforce to medical needs may take longer.

Data Migration Issues – Shifting from old systems to Salesforce can be tricky.

Ongoing Maintenance – Needs regular updates and admin support

CONCLUSION

Salesforce-based Medical Inventory Management provides an efficient and reliable way to track medicines, manage stock, and automate processes in healthcare organizations. While it requires investment in setup, customization, and training, the long-term benefits such as accuracy, automation, and scalability outweigh the drawbacks. Overall, it ensures better control over medical resources, reduces errors, and supports improved patient care

---

APPENDIX

- **Source Code:** Provided in Apex Classes and Triggers
- a Trigger to Calculate total amount on Order Item

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

{

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

}
```

Apex Class: 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;
        }
    }
  }
}
```